

User Manual

MDLsolutions – Dialer/Predictive Dialer/Call Center Solution, Call Center Manager and Agent Interface – Version 3.

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Getting Started/Important Links Getting Started/Important Links

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Predictive Dialer/Dialer

Statistic

(See Call Center Manager section for additional call center management, performance graphs and analytics)

The Statistics tab gives the Dialer/Predictive Dialer administrator a general overview of how the Dialer/Predictive Dialer and calls are progressing. It also allows the administrator to start/stop the calls and start/stop the DB connector.



Total Call Counter: Total calls placed in all call lists.

System Status: The system status RUNNING, STOPPED and COMPLETING.

Reasons Calls Stopped: States the reason the system stopped, for example, user input or error.

3CX Controller IP Address (3CX Only): The IP address of the 3CX IP PBX, that is set under the "Configuration File" (Menu items: File/Configuration File) settings.

Email Queue Status: The status of the agent response email queue.

CRM DB Connector Status: The status of the CRM DB connector and the ability to start and stop the CRM DB Connector.

Call Errors: Any SIP call errors produced while calls are being made.

Start Calls: Starts placing calls.

Stop Calls: Stops calls being placed, user needs to wait until all calls stop

normally, after clicking this button.

FAQ: Click to check the online FAQ's for help.

Performance Graph

Blue = Total calls placed. Green = Calls answered. Red = Calls not answered. Yellow = Calls answered by a fax machine or by an answering machine/voice mail.

Real-time Agent/Channel Information (bottom right)

Channels Dialing/Connected = Total amount of channels simultaneously dialing and the total amount of calls currently connected. Currently connected indicator only applies to Bridge Mode.

Agents Waiting For Calls = The total amount of agents waiting for new calls.

			Total Calls Counter:	1				Syste	em Status: STOP	PED
	and in	w.	Reason Calle Stonnod						4.1	
			reason cons stopped.	Stopped by in	enace.			11	And State	11111
	4		Email Queue Status:	No Emails In C	lueue	3CX Plug-I	n IP Address (3)	X Onlyi:	192.168.2.80	Connected
λ	DL·SOLU	TIONS			100 C		1/////	1///	151111	11/
No.	n all your Vole re	eurement CF	M DB Connector Status:	Stopped	Sta	irt 📝	Call Errors	None		
R	sed Agents/Cha	annels: 20				9 <u>7 98</u> 8888	9977772	277	111/1/1	
B	lesults (CPM)	Channel Status								
	Channel ID	Record ID	Number	Enquiries	Call Statu	s	Actio	n Info		
	1	0	none	0	EV_IDLE	46	none			
	2	0	none	0	EV_IDLE		none			
	3	0	none	0	EV_IDLE		none			
	4	0	none	0	EV_IDLE		none			
	5	0	none	0	EV_IDLE		none			
	6	0	none	0	EV_IDLE		none			
	7	0	none	0	EV_IDLE		none			
	8	0	none	0	EV_IDLE		none			
	9	0	none	0	EV_IDLE		none			
	10	0	none	0	EV_IDLE		none			
	11	0	none	0	EV_IDLE		none			
	12	0	none	0	EV_IDLE		none			
	100 (100 (10))	100					11740656			

Channel Grid

"Channel ID" = Numeric id of channel.

"Record ID" = The database record "ID" that is being processed.

"Number" = The telephone number being dialed by the Dialer/Predictive Dialer.

"Enquiries" = Reserved.

"Call Status" = The current status of the call, for example connected, transferred, disconnected and idle.

"Action Info" = The user inputted action/keyword text info that relates to the actual action being processed.

Call Lists

The Call Lists tab is used to upload and manage your imported call lists. Currently only comma delimited text files can be imported. Multiple call lists can be run simultaneously and if need be you can set multiple call lists to multiple call center teams/agent groups.

ID	Call List Name	Created	Active	Records	Records Processed	Status	Agent Group	Campaign
105	Demo Call List	09/25/13	1	4	1	Activated	Default	Default
Re	process Calls That Were	Not Transferred T	a An Agent		Activate Call List F	or Dialing	(Call List totals	are updated every 30: 1. CSV Call List

Reprocess Calls That Where Not Transferred To An Agent: Reprocess all calls that where not transferred to an agent.

Reprocess Calls with Disposition: Reprocess calls that have a certain disposition. **Scrub duplicate telephone numbers from all call lists:** Scrubs duplicate telephone numbers from all call lists.

Activate Call Lists For Dialing: Activate the selected call list for dialing. Deactivate Call Lists For Dialing: Deactivate the selected call list, so it is no longer dialed.

Import .CSV Call List: Import comma delimited text file.

Export List and Results to .CSV: Export a call list and it's results to a .CSV file. **Delete Call List:** Delete selected call list.

Backup Call List: Backup current call lists, for later use.

CALL LIST GRID

"ID"= Record id.

"Call List Name"= Name of the call list.

"Created"= Date the list was imported.

"Active"= If the list is activated for dialing.

"Records"= The number of records in the call list.

"Records Processed"= The number of records processed in the call list.

"Status"= If the list is active, deactivated or complete.

"Agent Group"= The agent group/call center team that the call will be transferred to, for this call list.

"Campaign"= The campaign associated with the call list.

103403 9132977426 ABC Max1 Bob Barker bob@abctech.c SD-67899 1/1/2000 103410 9132977426 ABC Max2 Fred Pinter fred@gon.com IL-69023 1/1/1900 103411 9132977426 ABC Max3 Craig Hamilton chamikton@fero CC61123 1/1/1900 103412 9132977426 ABC Max Mike Marcena mmarcena@joat AA-82213 1/1/1900 103412 9132977426 ABC Max Mike Marcena mmarcena@joat AA-82213 1/1/1900	 ID	Phone #	Company	First Name	Last Name	Email	Tracking ID	SocialSecurityNuml	DOB
103410 9132977426 ABC Max2 Fred Pinter fred@gon.com JL-68023 1/1/1300 103411 9132977426 ABC Max3 Craig Hamiton chamiton@trau CC-61123 1/1/1300 103412 9132977426 ABC Max Mike Marcena mmarcena@ipatt AA-82213 1/1/1300	108409	9132977426	ABC Max1	Bob	Barker	bob@abctech.c	SD-67899		1/1/2000
103411 9132977426 ABC Max3 Craig Hamilton chamiktor@fario CC-61123 1/1/1900 103412 9132977426 ABC Max Mike Marcena mmarcena@ipart. AA-02213 1/1/1900	103410	9132977426	ABC Max2	Fred	Plinter	fred@gcn.com	JL-69023		1/1/1900
103412 9132977426 ABC Max Mike Marcena mmarcena@jpart. AA.82213 1/1/1900	103411	9132977426	ABC Max3	Craig	Hamilton	chamilton@farro	CC-61123		1/1/1900
	103412	9132977426	ABC Max	Mike	Marcena	mmareena@jpart	AA-82213		1/1/1900

View Call List/Change Agent Group: View the selected call list details and if need be change the "Agent Group" for the call list.

Previous/Next: Loads next set of records .

Import Call Lists

Start by mapping the data from the comma delimited text file to the Dialer/Predictive Dialer columns. Then set the "Call List Name" the "Agent Group" and "Campaign", that you created or just use the defaults for "Agent Group" and "Campaign". Optional fields are explained below.

Database Fields (Not all fields required):	5551234, Ted, Task, Itask@abc.c	om, ABC, 12th St, Suite D, Irvine, CA, 920	00, USA, T#553224, Product A, 12.99	
Phone Number: 5551234 💌				
Secondary Number:				
First Name: Ted 💌				
Last Name: Task 💌				
Email Address: 🛙 Itask@abc.cr 💌				
Company: ABC				
Tracking ID: T#553224 💌				
Social Security Number:				
te Of Birth(mm/dd/yyyy):				
Address 1: 12th St 💌				
Address 2: Suite D 💌				
City: Irvine				
State: CA				
Zip/Postal Code: 92000 💌				
Country: USA				
elp-Custom Custom 1: Product A				
Custom 2: 12.99				
unch URL/EXE (with parameters) Help				
Il List Name: Demo Cal Lis	7 Min Number Length	Records Processed:	Check/remove duplicate numbers	
Agent Group: Default 👱	Records Rejected			
Campaign: Default 👱				
Help				

Call List Name: Any call list name you like that is shorter than 40 characters and contains no numeric characters.

Website URL/ Application EXE (supports parameters)(optional): If you require a website/application to be automatically launched when a call is transferred to an agent, then please set the website URL here and use the "Help" button to see what parameters you can pass to the website URL.

Prefix(optional): If your outbound rules in 3CX, require you to use a prefix to dial out of a certain VoIP provider/PSTN provider, then you can insert that prefix here.

Ignore First Records: Ignores the first record in the imported comma delimited text file, as this is sometimes the row that contains the column headings.

Records Imported/Records Rejected: Total records imported into the Dialer/Predictive Dialer and any records that did not meat the import filter/s criteria.

Filters: Two filters are used, minimum length of numbers and duplicate number check.

Search Call Lists

L Sea	a can can cr	Action Recur	dings					×	- Presign
	ID	Phone #	Company	First Name	Last Name	Tracking ID	SocialSecurityNum	DOB	14
Þ	103412	9132977426	ABC Max	Mike	Mareena	44-82213		1/1/1900	
	103409	9132977426	ABC Max1	Bob	Barker	SD-67899		1/1/2000	
	103410	9132977426	ABC Max2	Fied	Pinter	JL-69023		1/1/1900	
	103411	9132977428	ABC Max3	Craig	Hamilton	CC-61123		1/1/1900	

Search Call Lists for specified records or recordings.

Search By: You can search all the call lists using several different fields (Phone Number, Last Name, Process Date, Disposition, Address, City, State, Zip and Agent Extension).

Search Criteria: Enter the related field search criteria to search for.

Search Records: Click to start search.

Call Recordings: Click on "Get Recordings" button to download the WAVE file of the related recorded call. Requires the Bridge Mode (under the "Configuration" tab) feature to be used and call recording setting to be enabled in the dialers/predictive dialers configuration file.

CALL LIST FIELD GRID

See Agent Interface for details on call lists fields.

Call Records/Dialer Reports (See Call Center Manager for Call Center Reports)

The Call Records/Reports tab displays all the calls that have been made by the Predictive Dialer, and allows the administrator to run specific reports.

Call	Records will b	e automatically delete	d after: 7 days.			10. I I		Delete All Call Records
	ID	Dialed #	Call Start Time	Call End Time	Call Length	Call Term Status	Chan #	SIP Term Info
	817	9135554321	11/11/2013 4:57 AM	11/11/2013 4:58 AM	10	EV_TRANSFERRED	1	BYE sip:200@192.
	816	9135554321	11/11/2013 4:56 AM	11/11/2013 4:56 AM	360	EV_TRANSFERRED	1	BYE sip:200@192.
	800	9135551234	11/9/2013 10:47 AM	11/9/2013 10:47 AM	36	EV_CALL_NOT_ANSWE	1	SIP/2.0 487 Reque
tea	al-Time System	n Reporting					- Call R	ecords
184	al-Time System	n Reporting		Start Date: 11/10/	2013 04:32:56		- Call R	ecords oad Call Records

Call Report: The type of report the administrator can run.

Date Range: The Start and End date range of the report.

Load Call Records: Input the amount of call records you want displayed.

Delete All Call Records: Completely delete all call records. Call records are

automatically deleted after 7 days, but this can be changed in the dialer config file.

Call Record Grid:

ID: Record id.

Dialed #: Number that is dialed.

Call Start Time: The time the call started.

Call End Time: The time the call ended.

Call Length: The length of the call in seconds. This will be set if the Agent uses the Agent Interface.

Call Term Status: What was the status of the call, idle (no answer/disconnected) or transferred (to an agent).

Chan #: The Predictive Dialer channel the call is placed on.

Of Enquiries: N/A.

SIP Term Info: Gives the SIP call termination info, reason why call ended.

Do Not Call List

Use this feature if you want to automatically scrub your call lists against the "Do Not Call List" that your country/state/province provides. The "Do Not Call List" can be updated by the agent, please see Agent Interface.

	ID .	Phone Number	Complete Name	Complete Address	
0	11	7145552211	FredFormar	123 First Street Santa Rose CA	
1	12	9495552333	KateMonsur	543 Second Street Anaheim CA	

Delete: Delete all Do Not Call records.

Previous: Moves to previous record.

Next: Moves to next record.

Import: Imports call records from .CSV (comma delimited) text files only, can easily be created using Microsoft Excel or Microsoft Access.

Search List By: Should you need to search/verify the Do Not Call Lists, you can simply select then enter the Telephone Number or Complete Name that you want to search the Do Not Call List for.

Call Record Grid:

ID: Record id. Phone Number: Phone number to be scrubbed from the call list records. Complete Name: The name that is related to the phone number. Complete Address: The address that is related to the phone number.

Navigation

The actions below will determine what will happen to the call once connected. When using 3CX the default settings below are good enough to use and to start testing with.

Id Action/Reyword Navigation Value End 1 Qualify Call AnsMachineDet* 0 2 Transfer To Agent Blind Transfer(3CX) 1 3 Bye End Call 1	usu	Calllin	to Call Decorde Deverte	Do Not Call List Na	diciation De-	anan Ouavaa	Agent Groupe(Teams	Time Tores	Campaigne	Minu America	Confirm
Id Action/Keyword Navigation Value Enal 1 Qualify/Call AnsMachineDet 0 0 2 Transfer To Agent Blind Transfer(3CX) 1 1 3 Bye End Call 1 1 • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • <td< th=""><th></th><th>s can Lis</th><th>ers can records reports </th><th>DU NOT CALLEST MAN</th><th>ngation Ph</th><th>iones/Quedes</th><th>Agent Groups(reams</th><th>1 I mile zones</th><th>campaigns</th><th>view Agents</th><th>Coundr</th></td<>		s can Lis	ers can records reports	DU NOT CALLEST MAN	ngation Ph	iones/Quedes	Agent Groups(reams	1 I mile zones	campaigns	view Agents	Coundr
1 Qualify Coll AnsMachineDet 0 2 Transfer To Agent Blind Transfer(3CX) 1 3 Bye End Call 1	-	Id	Action/Keyword	Navigation		Value					Enab
2 Transfer To Agent Blind Transfer(3CX) 1 3 Bye End Call 1	e	1	Qualify Call	AnsMachineDet	2						0
3 Bye End Call 1		2	Transfer To Agent	Blind Transfer(3	CX)						1
To select an action to update or delete, double click in the grey area next to the action you want to edit or delete. Then edit the fields below and click update if you want to update the action, to add an action is simply fill in the fields below and click add. Do not forget to edit or delete. Then edit the fields below and click update if you want to update the action, to add an action, simply fill in the fields below and click add. Do not forget to edit or delete. Then edit the fields below and click update if you want to update the action, the delete the action. To add an action, simply fill in the fields below and click add. Do not forget to edit or delete. Then edit the fields below and click update if you want to update the action, the delete the action. To add an action, simply fill in the fields below and click add. Do not forget to edit or 3CX plag in, if you are using 'filled Transfer'. Note: When using telecharbed's you can appecify if you would like the Predictive Dialer to delay disconnecting the cell when it finds an answering machine. By simply adding a delay in miliseconds in the value field transfer'.		3	Bye	End Call	22						1
To select an action to update or delete, double click in the grey area next to the action you want to edit or delete. Then edit the fields below and click update if you want to update the action, click delete the action. To add an action, simply fill in the fields below and click add. Do not forget to add our 3CX plag in, if you are using 'Bfind Transfer'. Note: When using MachineDet' you can specify if you would like the Predictive Dialer to delay disconnecting the cell when it finds an answering machine. By simply adding a delay in miliseconds in the value fiel											
AD LINDRING CODINING											
	p – T I click sMac en u corc	o select an a detete to de hineDet' you adating 'Ansh HID: 1	iction to update or delete, double lete the action. To add an action i can specify if you would like th fachineDet. Action/Keyword: Qua	click in the grey area ne singly (II in the fields be te Predictive Dialer to dek niffy Call	nd to the actio slow and click ay disconnecti Action(Call Fi	n you want to ed add. Do not forg ing the call when low): AnsMac	t or delete. Then edit the fi at to add our 3CX plug in, i it finds an answering mac thineDet	ekis below and ci you are using B hine. By simply at /alue:	ick update if you ind Transfer'. No Iding a delay in n	want to update t te: When using miliseconds in the Enal	he action, value fiel ble: 0
AnshachinoDetMessage	p – T I click sMac en uj corc	o select an a delete to de chineDet' you adating 'Ansh LID: 1	iction to update or delete, double lete the action. To add an action r can specify if you would like th vlachineDet. Action/Keyword: Qua	click in the grey area ne singly til in the fields be te Predictive Dialer to dek nifty Call	nd to the action slow and click ay disconnecti Action(Call Fi	n you want to ed add. Do not forg ing the call when low): AnsMac Line AnsMac	t or delete. Then edit the ti et to edd our SCX plug in, i it finds an answering mac himeDet v	elds below and cl you are using 'B hine. By simply at Value:	ick update if you ind Transfer' No sking a delay in n Defautt	uwant to update t ste: When using miliseconds in the Enal	he action, value fiel blie: 0
AnsMachineDetMessage Add Upd Bind Transfer(3CX) Bridge Transfer(3CX) Bridge Transfer(3CX)	p = T t click isMac isMac isMac isMac isMac isMac	o select an a detet to de hineDet you deting 'Anst LID: 1	ction to update or delete, double lefe the action. To add an action con specify if you would like th HachineDet'. Action/Keyword: Qua	click in the grey area ne simply fil in the fields be the Predictive Dialer to dela alify Call f Add	nd to the action low and click ay disconnecti Action(Call Fi	n you want to ed add. Do not forg ing the cell when tow): AnsMac Upp Blind Tr Blind Tr Blind Tr	t or delete. Then edit the fi t to add our SCX plug in, i it finds an answering mac filmeDet himeDetMessage thimeDet ansfer(3CX) (ransfer(3CX)	elds below and cl you are using 'B hine. By simply at Value: Group Na	ick update if you ind Transfer'. No kling a delay in n kling a delay in n me: Default	want to update to the When using miliseconds in the Enal	he action, value fiek ble: 0

Record ID: The action record id.

Action/Keyword: The unique identifier used when adding an action.

Action(Call Flow): The actual call flow action that is performed, once the call is made. Options:

AnsMachineDet: If an answering machine is detected, the dialer hangs up, if not, it continues to next action.

AnsMachineDetMessage: If an answering machine is detected, then it leaves a message, if not, it continues to next action.

Blind Transfer(3CX): Will transfer the call to an agent in a 3CX queue, defined under the "Phone/Queues" tab on the Predictive Dialer.

Bridge Transfer(3CX): Used when calls are not transferred through 3CX, but directly from the VoIP provider/gateway.

Transfer: Transfer the dialer call, to the next available extension in the extension list "Phone System Transfer List".

On # Go Back Steps: If the person being called, press's # during a PlayPromptSurvey action, the Dialer/Predictive Dialer will go back the amount of steps/actions defined in the "Value" field.

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PlayPrompt: Plays a voice prompt Wave file (64 kbps, 8 bit, mono, 8khz). All wave files must be placed in the "Prompts" directory in the Dialer's main directory.

1.Select the second record in the list 'Blind Transfer(3CX)'.

2.Change the "Action" to "Play Prompt" and the "Value" to "welcome.wav". Welcome.wav is a test play prompt that is included with the installation, click "Update". To add your own prompt, create a prompt in the following format "Wave file (64 kbps, 8 bit, mono, 8khz, CCITT-U-LAW)" and copy it into the "Prompts" directory, that is located in the dialer's application directory, and simply change the "Value" to your new prompt name under the "Play Prompt" action.

3.To convert your wave/audio file:

Use Windows Sound Recorded to convert your files.

(a): Launch Sound Recorder in Windows XP (Start/All Programs/Accessories/Entertainment/Sound Recorder).

- (b): Select File/Open select audio file to open.
- (c): Select File/Properties/Convert Now.
- (d): You need to select 8.000 kHz, 8 Bit, Mono CCITT u-Law Format: CCITT u-Law

Attributes: 8.000 kHz, 8 Bit, Mono

- (e). Click OK, click OK again, and then click File/Save.
- (f). Check the file format by right clicking on it, properties/summary.

4. Upload your call list, by clicking on the 'Call List' tab on the dialer.

5. The prompt will now be played when you start the dialer.

NOTE: When using 'Play Prompt Get Key' under the 'Navigation' tab, make sure you include/enable 'AnsMachineDet' before using 'Play Prompt Get Key'.

PlayPromptSurvey: Will play a prompt as described in the "PlayPrompt" action, and will store any key that is pressed by the person dialed, in the SurveyOptions field in the Dialer/Predictive Dialer database. This Survey Option can be exported along with the call list at anytime using the "Call List" tab on the Dialer/Predictive Dialer or Call Center Manager Dashboard. The "PlayPromptSurvey" action also accepts # to repeat the prompt or previous steps using the "On # Go Back Steps" action and accepts 0 to transfer to an operator by using the "Blind Transfer(3CX)" action after the "PlayPromptSurvey" action.

Play Prompt Get Key: Will play a prompt as described in the "PlayPrompt" action, after the Dialer/Predictive Dialer receives a key input from the person dialed, the Dialer/Predictive Dialer will then move to the next action.

Play TTS: Will play any text in the "Value" field up to 512 characters, to the person dialed. If you want to play information from an imported call list/database field, then simply wrap the database field in "F()" and the Dialer/Predictive Dialer will know what to do. Example: F(FirstName). Remember to remove spaces from the call list descriptions, when using them in the F() wrap.

End Call: Ends the dialed call.

Value: (Optional) The value that is passed to the action. Check tab notes.

Enable: Allows the administrator to enable or disable an action.

Group Name: This allows you to assign a unique set of call flow actions to individual call lists, using a pre defined amount of channels that you need to define under the "Agent Groups (Teams)" tab.

Add: Add new action.

Update: Update selected action.

Delete: Delete selected action.

Navigation Grid:

Id: Action record id Action/Keyword: The unique keyword the administrator uses to identify an action. Navigation: The action/s you selected for your calls to follow once the call is connected. Value: Value passed to action if required. Check tab notes. Enable: If the action is enabled or disabled.

Phones/Queues

The 3CX queue (and set of extension/s), or extension/s that the administrator wants the calls transferred to. When using 3CX, all calls must be transferred to a 3CX queue (only).

	ID Name		Extension/Queue	Group Name	Extensions In Queue
	4 3CX Queu	e	873	Default	101,150,100
sta -	- There are two options when o	eeting your transfer kst			
sip -	- There are two options when o	eating your transfer list esiphones that except o	calls drectly from the dalar, by	y setting the extension up this way	r *100g2192.158.2.100*(example). *100* is the actual
elp - - Yo	- There are two options when or ou can singly use VolP soft phon seriextension of the YoUP phone, so us can also use SCX P PAX. Clck	eating your transfer list esiphones that except o nd "192.160.2.100" ist on the FAQ builton at th	sais directly from the dater, by he P address of the actual Vo	y setting the extension up this way P phone. In this scenario features	/ "100g192,168,2,100"(example)."100" is the actual like conference and transfer are not supported. Defair for 30% PEX.
eljo - - Yo - Yo	- There are two options when or ou can singly use VoIP soft phon er/extension of the VoIP phone, s to can also use SCX IP PBX. Click - To select an extension to updat	eating your transfer list esiphones that except o and "1927.66.2.100" is to on the FAQ builton at th on the FAQ builton at th	sails directly from the dater, by re P address of the actual Vo e bottom list of the page to se in the gray erea next to the se	y setting the extension up this way P phone. In this scienario features to how to use 3CX: FAQ: Predictive xtension you want to edit or delete	y "100g2192.185.2.100"(example). "100" is the actual iRe conference and transfer are not supported. e Dialer for 3CX.P.PBX.
elp - - Yo Yo e ex	- There are two options when of ou can singly use VolP soft phon er/extension of the VolP phone, su can also use 3CX IP PBX. Click - To select an extension to updat extension, or just click delete to de	eating your transfer list esiphones that except a nd "1927.163.2100" is to on the FAQ button at th or detete, double click late the extension. To a	Salls directly from the dialer, by he IP address of the actual Vo e bottom left of the page to se in the grey area next to the e dd an extension, simply fil in th	y setting the extension up this way P phone. In this scenario features e how to use 3CX. FAQ: Predictive dension you want to est or delete he fields below and click add.	y "100g2192.168.2.100"(exemple). "100" is the actual like conference and transfer are not supported. a Dialer for 3CX IP PBX- . Then edit the fields below and click update if you want to update

ID: Record ID.

Name: The name of the 3CX queue or name of the person using the extension. **Extension:** Extension number of the 3CX queue or call center employee's extension. **Group Name:** The group of Agents/Call Center team that you want the calls transferred to.

Extensions in Queue: The extensions you want to add to the 3CX queue.

Help:

(a) Create a 3CX queue name and extension number, to the 'Phones/Queues' list as shown below. Leave the 'Group Name' as default, unless you have setup individual call center groups/teams. Add all the agent extension numbers that the calls will be transferred to by the Predictive Dialer.

(b) Should you need to send calls in one call list to one group of agents, and calls in another call list to another group of agents, then please look over the 'Agent Group Setup' on Page 34. Otherwise for testing purposes just select default.

Create/Delete queue in 3CX with/remove extensions: Leave checked if you want the Predictive Dialer to create the queue and extension/s in 3CX for you.

Add: Adds a new queue or extension.

Update: Updates selected queue or extension.

Delete: Delete selected queue or extension.

Phone System Transfer List Grid:

ID: Record id.

Name: The name of the call center employee or 3CX Queue name.

Extension: Extension of the call center employees phone or extension number of the 3CX queue, that the calls are sent to.

Group Name: Call center agents group/call center team.

Extension in Queue: Extensions in the 3CX queue.

Agent Groups(Teams)

The administrator will only need to create a separate agent group if multiple calls lists need to be run at the same time and transferred to different sets of extensions/3CX queues, commonly known as call center teams or agent groups. If this is not required just leave the default settings.

Example: If you have 4 agents that will work with English calls and 4 agents that will work with Spanish calls, and you have an English call list and Spanish call list, then you can create 2 agent groups/call center teams. You can simply do this by adding one agent group record with 4 "Simultaneous Dialer Channels" and name it English Team and add another agent group record with 4 "Simultaneous Dialer Channels" and name it Spanish Team. Remember to make sure you enable both agent group records.

0	- Chamber	
	1	1

ID: Record ID.

Group Name: The name of the agent group/call center team.

Caller ID: If supported by VoIP or PSTN provider, this will be the caller id that will be shown on the receivers phone when calls are placed. May require the dialers Bridge Mode feature. Tab "Configuration/Bridge Mode".

SIP Contact=CallerID: Reserved.

Simultaneous Dialer Channels: The amount of Predictive Dialer channels you want to set to the agent group/call center team. We recommend you assign at least one channel per agent.

Enable: Allows the administrator to enable or disable an agent group.Add: Adds a new agent group.Update: Updates selected agent group.Delete: Delete selected agent group.

Agent Group(Call Center Teams) List Grid:

ID: Record id.

Group Name: The name of the agent group/call center team used in the "Phones/Queues" and "Call Lists".

Caller ID: The caller id for the agent group/call center team.

SIP Contact=Caller ID: Reserved.

Channels Assigned To Group: Amount of simultaneous channels assigned to the agent group/call center team.

Enabled: Allows the administrator to enable or disable an agent group/call center team.

Time Zones

Time zones are used when calling different states, provinces and countries from your own that have different time zones. Time zones are simply managed by entering the dialing code for that state, province or country, and then entering the GMT offset (time zone) and start and time relevant to that time zone.

	Time Zone	Start Time	End Time	Caller ID
4 714	-8	9	18	5559000
5 949	-8	9	18	5558000
		the set the set of	and a Deducation	

ID: Record ID.

Area Code: The are code of the actual city, state, province, country you are dialing. Example: If you are calling Santa Ana, California from the East Coast of USA, then the prefix would be 1714. From another country is may be 001714, check your country requirements online to be sure.

Time Zones (GMT Offset): This is the GMT offset that applies to the city, state, province and country you are calling. Check online for this information.

Start Time Hour (24 hour format): The call start time relevant to the above GMT offset. End Time Hour (24 hour format): The call end time relevant to the above GMT offset. Caller ID: Each time zone can support it's own outbound caller id. This features is only supported using the dialers Bridge Mode feature. Tab "Configuration/Bridge Mode". Add: Adds a new time zone.

Update: Updates selected time zone.

Delete: Delete selected time zone.

Import: Import your own time zone list. These can be purchased online, and require the dialing code and GMT offset to be included in the list as shown in the screen shot above.

Campaigns

Campaigns are used for grouping call lists together that target a specific criteria (Campaign). Once a campaign is defined, it can be reference through out the Predictive Dialer.



ID: Record ID.

Name: Name of the campaign.
Description: A brief description of the campaign.
Cost: Reserved for later versions.
Add: Adds a new campaign.
Update: Updates selected campaign.
Delete: Delete selected campaign.

View Agents

View agents is used for seeing which agents have launched their Agent Interface and are ready to receive calls, or are on a call.

MOCOddroop	Diddroop	Eutomaian	Amont Status	Last Status Undata
MACAULI ESS	102 160 2 23	101	Agent Status	Last Status Optiate

MACAddress: MAC Address of the computer that the Agent Interface is installed on. **IPAddress:** IP Address of the computer that the Agent Interface is installed on. **Extension:** Extension of the agent.

Agent Status: If the agent is ready to receive calls or is on a call.

Last Status Update: The last time the agent clicked on "Ready to receive calls". **Total Agents:** The total amount of agents connected to the predictive dialer.

Configure

Configuration is used for configuring predictive dialer algorithm, registration and global settings. Please note there are additional global settings for the Predictive Dialer / Dialer config file, Page 19.

	g rigorium j	i (meulum call rate, som	e calls may have to	hold in a queue) <u>•</u> Set Cal	I Answer Timeout: 30 Set Second
Phone System R	Registration (Dialing	Through Phone System)	Bridge Mode (Dir	ct To VolP Provider) Please sto	op the dialer when changing this informatic
		s	' SIP Registration - 3	X Phone System Only	
User ID(3CX E	xtension): 200		Password:	** 3CX Se	nver: 192.168.2.80
	looun		r,		
Realm/	Question 13CAPhe	nesystem	Status:	egisterea	
			Re	ister	
Help - 3CX user	rs, please enfer "3CXPh	oneSystem" in the "Realm#)	Re uestion field. If you an	ister	a Wreshark/PCAP frace while trying to register
Help - 3CX user and look under (3CX plug in): Se other phones sy	rs, please enfer "3CXPh (407 Proxy Authenticeti et the extension number ystems must use "Bridg	oneSystem" in the "Realm&a on Required), or enail the PC to the queue in 3CX that you e Mode".	Re uestion field, if you ar CAP to support@mdiso u want to transfer the	ister	a Wireshark/PCAP frace while trying to register t Disposition Interface (Do not forget to use our the 'Bind Transfer' on the 'Navigation' tab. "All
Help - 3CX user and look under 1 3CX plug in); Se other phones sy	rs, please enfer "3CXPh (407 Proxy Authenticati et the extension number ystems must use "Bridg	oneSystem" in the "Realm/G on Required), or email the PC to the quaue in SCX that you e Mode".	Re uestion field, If you ar CAP to support@mdisc a want to transfer the	ister not sure of your Realin question, simply run ubons com. Other settings when using Agen alls to on the "Prones/Gueues" tab and use t	a Wireshark/PCAP frace while trying to register t Disposition Interface (Do not forget to use our the 'Blind Transfer' on the 'Navigation' tab*All
Help - 3CX user and look under 1 3CX plug in): Se other phones sy	rs, please enter "3CXPh (407 Proxy Authenticati et the extension number ystems must use "Bridg	oneSystem" in the "Realm.Q on Required), or email the PC to the queue in 3CX thet you e Mode". Call Start Time Call Start Time	Re uestion field, If you an AP to support@mdls u want to transfer the	ister not sure of your Realm question, simply run vitons com. Other settings when using Agen rats to on the 'Phones/Gueues' tab and use t 	a Wireshark/PCAP trace while trying to register It Disposition Interface (Do not forget to use our the Blind Transfer' on the 'Navigation' tab. *All
Help - 3CX user and look under 3CX plug in): Se other phones sy	rs, please enter "SOXPh (407 Proxy Authentical) the extension number ysterie must use "Bridg 10 10	oneSystem" in the "Realm/G on Required), or email the PC to the queue in 3CX that you e Mode". Call Start Time 1:05 AM	Re uestion field. If you ar CAP to support@mdisc u want to transfer the	Ister Instance of your Realm question, simply run utions com. Other settings when using Agen ratis to on the 'Phones/Gueues' tab and use t Call End Time 11:59 PM	a Wireshark/PCAP frace while trying to register It Disposition Interface (Do not forget to use our the 'Blind Transfer' on the 'Navigation' tab. *All
Help - 3CX user and look under 3CX plug in): Se other phones sy	rs, please enter "3CXPh (407 Proxy Authenticati et the extension number ysterins must use "Bridg ID 10	oneSystem" in the "RealmOs on Required), or email the PC to the queue in 3CX that you e Mode". Call Start Time 1:05 AM	Re JAP to supportigendis a want to transfer the	Ister not sure of your Realin question, simply run tions con. Other settings when using Agen tals to on the 'Phones/Queues' tab and use t Call End Time 11:59 PM	a Wireshark/PCAP frace while trying to register It Disposition Interface (Do not forget to use our the Blind Transfer' on the 'Navigation' tab. "All

Predictive Dialing Algorithm: Set the Predictive Dialer to the user selected algorithm. Options:

Exact: Makes sure there is an agent available for each call.

Medium: Medium call rate, some calls may have to hold in the 3CX queue.

High: High call rate, extra calls will be waiting in the 3CX queue.

Max: As many calls as possible, extra calls will wait in the 3CX queue.

Call Answer Timeout: The amount of time the Predictive Dialer / Dialer waits for the call to be answered before disconnecting.

SIP Registration/Device Information (Outbound Calls):

SIP User ID: The user ID required by the SIP endpoint in order to register.

SIP Password: The password required by the SIP endpoint in order to register.

SIP Server: The IP Address of the SIP endpoint you are registering with or/and sending your outbound calls to.

Realm/Challenge Question: May need to be provided. Please check with your VoIP provider or reference your VoIP gateway or IP PBX user guide.

Status: If your registration was successful or not.

Register: Click the registration button to submit your registration information to

the SIP endpoint. You can also select the check box if the Predictive Dialer / Dialer is not required to register with the SIP end point.

Start Stop Time Grid:

"Call Start Time"=The global time you want the calls to start dialing.

"Call End Time"=The global time you want the calls to stop dialing.

Start Time: The time you want the calls to start dialing.

End Time: The time you want the calls to stop dialing.

Run On Weekends(Sat/Sun): If you want the Dialer/Predictive Dialer to run on weekends according to the defined time schedule then check this box.

Turn Dialer Off After 8pm: Use this setting if you need to make 100% sure the dialer is stopped/tuned off after 8pm.

MDL solutions Predictive Dialer / Dialer - Version 3.3.7 (Trial Release

•	ID 2	VolP Provider - IF 4.50.100.100	/Domain Name	Account 6572359000	Password tesfdggre	Phone System VP Acco 17149291018	ount Agent Group Default	Prefix
•	2	4.50.100.100		6572359000	tesfdggre	17149291018	Default	
								1.
17	Enable	Iridge Mode		Add	Update	Delete External IP	Address: 64.100.123.200	
4	Enable	Iridge Mode	Cali Start	Add	Update	Delete External IP	Address: 64.100.123.200	1
4	Enable	ridge Mode ID 1	Call Start 1:05 AM	<u>A</u> dd	Update	Delete External IP Call End Time 11:59 PM	Address: 64.100.123.200	

Bridge Mode (Place calls directly with VoIP Provider):

VoIP Provider – IP Domain Name: The IP Address or domain name of your VoIP provider or PSTN gateway.

Account: The VoIP providers or PSTN gateways account/username information. **Password:** The VoIP providers or PSTN gateways password information.

Additional Settings When used with 3CX

Phone System VP Account: The inbound DID created in 3CX, where the dialer calls will be transferred to. Make sure to map this inbound 3CX DID to a 3CX call queue. Agent Group: The agent group used to process the desired call actions, call queues and call lists.

Prefix: If a VoIP provider/VoIP gateway prefix is required, please enter it here. Enable Bridge Mode: Check this box after setting the external IP address to enable Bridge Mode.

External IP Address: Input your external IP address. If you not sure of your external IP address, simply type "My IP Address" using Google on the dialer computer.

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Menu Options (Move to first page)

Below are the details on several of the menu options offered by the Predictive Dialer / Dialer.

Select "Backup/Restore" to backup/restore the Predictive Dialer / Dialer SQL database.

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	cords/Repor	ts Do Not Call List N	avigation Phones/Queues	Agent Groups(Teams) Ti	me Zones Campaig	gns View Agents Confi
C Vershien Cile						
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	dicative, with		cans rei williace	Call Answer Timeout.	Seconds	5
		SIP Registration/Dev	rice Information to ATA, Vo	P Gateway, VolP Provider or	IP PBX.	
ID: 200	Passwo	ord: ***	Server: 192.168.2.72	Realm/Ouestion:	CXPhoneSystem	Status: Registered
Register		neck to simply enter IF	Address of SIP Gateway	rovider/Server where calls i	vill be sent, do not re	egister.
– If you are using a	n instant online a	ccount (sipstation.com), the	en simply set the "User ID" to "S	IP Username", "Password" to "SIF	Password" and the re	st has been filled in for you.
click "Register" and	you are good to	go. The sipstation.com acc	ounts are good for +- 2100 min	tes of calling a month. If you nee	d more minutes simply o	call MDL solutions or
dwidth.com to upgra	ide your account	.*Asterisk users, please er	nter "asterisk" in the "Realm Qu	stion field. *3CX users, please er	ter "3CXPhoneSystem"	in the "Realm Question field. I
are not sure of your	Realm question,	simply run a Wireshark/PC.	AP trace while trying to register	and look under (407 Proxy Authe	entication Required), or	email the PCAP to
port@mdlsolutions.c	om. If you are ma	king calls through your IP P	BX phone system, simply creat	e an extension in your IP PBX and	enter the details above	. Other settings when using
nt Disposition Interte	ice (Do not forge	t to use our 3CX plug in): 30	Acterials and all other IP PBY	per to the queue in 3CX that you	want to transfer the cal	is to on the Phone System
ne System Transfer	list'	ster on the Navigation tab.	Astensiks and all other in PDA	isers, you need to set the extens	ion and iP address of tr	ie actual voie priorie in trie
	C 225 P.11					-
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Select "File"/"Configuration" to set the Predictive Dialer / Dialer global configuration settings.

	T Configuration File Setting	atal Calle	Counter 4	1			estam Statues Stop		
	SDI Compation String	Conversio	anhantsol EVERESS (akin	I Catalaga-MDL	ah éisne Dialac Hose ID -		isou1224		
1	IP ordress of Dialer	localbost	Canosi Geleza ne Sosnik	(detauthor	silver)	sa,i assword-med	lagivi234,		5 17
MDL-S	3CX Controler IP address:	GCX IP A	DDBESS	-	an weig			sted	
Ronall vol	SMTP Server IP address:	EmailServ	/61	_					
di Results	From Email Address:	info@md	solutions.com	<u> </u>					
3	To Email Address 1:	support@	mdisolutions.com	-				-	
	To Email Address 2:	info@loca	alhost					ered	0
2.4	SMTP Username:	support@	mdisolutions.com	-				x or VM	Ö
	SMTP Password	seiko1		-					
1.8	Total Channels:	1	Demo limitations - Max 4	channels 'Blind	Transfer' using 3CK, Ma	ax 2 channels usin	g standard 'Transfer'.		
1.2	Call Recording(1=on):	0							
1015/011	Managed Agent Calls:	false	Set to 'false' if you are u	sing 3CX, otherv	rise set to 'true'.				
0.6	Automated Dialer.	true	Set to 'true', if you are go	oing to use only	he automated dialing fe	ature.		±01	
0							Update Clos	*	
-			10	10	20	2.5			

Set:

a. SQLConnectingString(Value) to your database server IP address, same IP Address (localhost) as this computer if you are going to install SQL Server on this computer.

c. LocalIP(Value) to the IP Address of the computer you are installing the dialer on. The default "localhost" should work just fine.

d. 3CXController(Value) to the IP address of your 3CX phone server that has the MDLsolutions plug in. To install the plug in, simply download it from the MDLsolutions website (dialer web page) and copy/paste it into "C:\Progam File\3CX PhoneSystem\Bin" (2003/XP Pro) - c:\Program Files(x86)\3CX PhoneSystem\Bin (2008/Windows 7), double click on the plug in. Click minimize for plug-in to be hidden and added to the bottom right system tray.

e. FromEmailAddress(Value) to the email address you want your email notifications to come from.

f. ToEmailAddress1(Value)/ToEmailAddress2(Value) to the email address you want your email notifications to go to.

h. Username(Value) to your SMTP server login username. Use

hMailserver(free), if you need an SMTP server.

h. Password(Value) to your SMTP server login password. i. Total Channels the total amount of channels the Dialer/Predictive Dialer can run simultaneously. Cannot exceed your total licensed amount. Demo max is 4 channels.

Page 24

k. ManagedAgentCalls (Value) to false if you are using 3CX, otherwise true. Also set to true when playing pre recorded messages.

I. DialerModeOnly(Value) to false if you are using 3CX, otherwise true when just playing pre recorded messages.

m. PredictiveDialerLoad(Value) The Predictive Dialing algorithm will try to make 100% sure there is always an agent available for every call, but if that is not a requirement and you want the Predictive Dialer to make more calls then available agents, then just increment this setting to increase the call rates. Calls not immediately answered by the agents will be left in the 3CX queue, please make sure you have a message playing that explains why a client was called, and that they need to hold on.

Select "Settings"/ "CRM DB Connector" to set the values necessary to connect to a SQL database that contains the call records you want imported and dialed. Max is 5 connections in the trial/production version.

MDLsolutions Pro				
File Settings Hos	The Agent Interface would then use the CBM lead/record id fro	m the Predictive Dialer database to launch the web lead	form (UBL) for the CBM	
Statistics Call Lists	on the agent computer through the Agent Interface.			/iew Agents Configure
	ID SQL Connection String	SQL Query	SQLUpdate	
	12 Server=192.168.2.96\SQLEXPRESS;Initial Cata	SELECT ID AS LeadId, TelNum AS Telephone1,	UPDATE SQLorCRM	ED
	14 Server=192.168.2.96\SQLEXPRESS;Initial Cata	SELECT ID AS LeadId, TelNum AS Telephone1,	UPDATE SQLorCRM	
				Connected
MDL·SOLL	<u> </u>	Scroll right for	urther information->	
Licensed Argente Ch	SQL Connection String (Used to connect to the CRM SQL data	base)		
Channel ID				
Channer ID	Custom SQL Query (Used to retrieve leads/records from CRM d	atabase, Make sure you assign the lead/record id to fiel	d/variable "LeadId".):	
2	COL COM Lindste Chine II land to undete a COM land/second in	the CDM detabases as the second is not retrieved again		
3	State Child Opticale Stilling (Used to update a Child leadylecold in	The Child database so the record is not retrieved again.	Help	
4	CRM URL Template (Used to launch the CRM agent web interf	acel:		
*		2007	Help	
	Connection Call List Name (Will be used to create a call list used	d for importing records to, from your CRM SQL database	1	
	Polling Interval:			
	10000 Milliseconds (1000 to 360000)	Include Second Phone Number (As additional second Phone Number (As addititational second Phone Number (As addititatita	nal record) Help	
	Agent Group:			
		Include Mobile Phone Number (As addition	al record) Help	
	Campaign:			
	L			
IMPORTANT NOTE -	Add (Update Delete	Close	your IP PBX. FAQ
L.	i du can cleate	a maximum or 5 SQL connections.		

SQL Connection String: The SQL connection string for the SQL Database. Custom SQL Query: The SQL query used for finding the leads you require in the SQL Database.

SQL CRM Update String: Used to updated the SQL call record, so it is not imported again. Suggestion, use "DoNotPhone" for MS Dynamics.

Polling Interval: How long you want the Predictive Dialer to wait before polling your database for more records.

CRM URL Template: The URL the Agent Interface will use to launch the CRM lead. MS Dynamics only - The [LEAD_ID], is usually put after the 'id=', between '%' and after the two initial characters ie: '7b'.

Connection Call List Name: Will be used to create a call list used for importing records to, from your CRM SQL database. Page 25

Select "Help" General help information	and how to contact support
(support@mdlsolutions.com)	

istics Call Lists Call Records/F	Installation Manual	ation Phones	Queues Agent Groups(T	eams) 🛛 Time 2	Zones Campaigns	View Agents Conf
ID Call List Name	Contact Support	Records	Records Processed	Status	Agent Group	Campaign
190 MSDynamicsLeads	FAQ's Activate	26	6	Complete	Default	Default
Reprocess Calls That Where	Not Transferred To An Agent		Activate Call List F	or Dialing		ort .CSV Call List
Reprocess Calls That Where Reprocess Calls with Disposition	Not Transferred To An Agent		Activate Call List F Deactivate Call List	or Dialing For Dialing	Imp Export Li	ort .CSV Call List st and Results to .CS

2: Agent Interface

Agent Interface

The Agent Interface is used by the agents to see which client has been transferred to them and to update and set new/updated client information and dispositions.

🦻 MDLsolutio	ns,Inc. Agent Disposition Interface - Ver 3,34 (Connected)	
Options He	P	
🕂 Agent Inter	ace 🥁 Reminders 👔 Script 🛛 🖂 Statistics 🛛 强 Configuration	#DL SOLUTIONS
Record ID:	103444 Caller ID: 9132977426 Campaign: Default	Interface: 3CX
First Name:	Teb Last Name: Forber	Status: Call Ended
Emait	tforber@abcmax.com SSN: 00-00-0000 D0B: 1/1/1900	Date Processed: 10/31/2013 10:17:00 AM
Address 1:	549 Fifth St Address 2: Suite 22	
City:	CA State: CA Postal Code/Zip: 99940	Country: USA
Company:	ABC Max Tracking ID: AA-82213	Controls
These case	Product Price	Ready to receive calls
	Product A 150.77	Record Off
_	Category Website	End Cal
		Make Cal
	No message when phone number is not found. Auto Launch URL/EXc Launch	
Search Field:	Search Value: Search	Auto Queue Logour hep
Survey		Email Response: Thank You For Purchase Rev 1
Comments		Disposition: Qualified
	Last Updated: Thursday, October 31, 2013 - 10:16 AM By Agent Extension (101)	Update
		Update with Reminder
		Send SMS Text Message
Preview Diat	<u></u>	Call History:
	Record ID Number Dialed First Name Last Name DOB Add	(633
E		
Agent extension	POL	

Record ID: The actual record id of the call record.

Caller ID: The telephone number of the client, that has been transferred to the agent. **Campaign:** The campaign the call record was assigned to.

Interface: 3CX or Direct, currently 3CX is recommended.

Status: Whether the call is connected or disconnected.

First Name: The first name of the client, that has been transferred to the agent.

Last Name: The last name of the client, that has been transferred to the agent.

Email: The email of the client, that has been transferred to the agent.

Record: The call record id for future reference.

SSN: The social security of the client, that has been transferred to the agent.

DOB: The date of birth of the client, that has been transferred to the agent.

Date Processed: The date the call record was processed.

Page 27

Address 1: The first address of the client, that has been transferred to the agent. Address 2: The second address of the client, that has been transferred to the agent.

City: The city of the client, that has been transferred to the agent.

State: The state of the client, that has been transferred to the agent.

Postal Code/Zip: The postal code or zip code of the client, that has been transferred to the agent.

Country: The country of the client, that has been transferred to the agent.

Company: The company of the client, that has been transferred to the agent.

Tracking ID: A custom transaction id, that can be set by the agent or call list provider.

Custom 1: A custom field that can be set by the call center manager.

Custom 2: A custom field that can be set by the call center manager.

Custom 3: A custom field that can be set by the call center manager.

Custom 4: A custom field that can be set by the call center manager.

Auto Launch URL/EXE: Will automatically launch the website/URL or application/EXE that is directly related to the call list when checked. This can be defined when the call list is imported through the Dialer/Predictive Dialer.

Launch: Test the URL/EXE related to the call list record.

Survey: Allows the agent to ask the person dialed a set of questions that were previously defined by the Call Center Manager Dashboard, and that are recorded in the Predictive Dialer database, that can be exported with the call list. The value/s are stored under "SurveyOptions" field.

Search Field: Search the selected call record field, in order to find a specific call record. Search Value: The value to search for.

Search: Click button to search.

Comments: Any comments you want to add/update for the current call record.

Preview Dial: Allows the agents to see the calls the Predictive Dialer is dialing.

Ready to receive calls/Stop receiving calls: Allows the agents to tell the Predictive Dialer when they are ready to receive calls and when they no longer want to receive calls.

Record On/Off: Allows the agent to turn on and off call recording.

End Call: End the current call.

Make Call: Make a call using the textbox on the left.

Disposition: Set the disposition that best describes the result of the discussion that the agent had with the client.

Update: Update the call record with the new disposition and any comments or fields that were changed during the call.

Update with Reminder: Update the call records with the new disposition and any comments or fields that were changed during the call, and at the same time set a date/time reminder, that will automatically remind you to call the client back.

Send SMS Text Message: Use to send the current caller id an SMS message. Requires user to signup to an SMS service provided through MDLsolutions.

Call History: Keeps a selectable record of all previous agent calls.

You can view the additional 12 custom fields by clicking on the down arrow button on the left hand side.

Agent Inter	ace 🥃 Reminders 🗐 🎹 Script 🛛 🚈 Statistics	🛛 🙀 Configuration	NDI 1010			
Record ID:	103444 Caller ID: 9132977426	Campaign: Default	Interface: 3CX			
First Name:	Teb	Last Name: Forber	Status: Call Ended			
Emait	tlorber@abcmax.com	SSN: 00-00-0000 DOB: 1/1/1900	Date Processed: 10/31/2013 10:25:00 AM			
Address 1:	549 Filth St Address 2: Suite 22					
City:	CA State: CA	Postal Code/Zip: 99940	Country: USA			
Company:	ABC Max Tracking ID: AA	-82213	Controls			
	Product	Price	Ready to receive calls			
	Product A	150.77	Record OR			
	Category	Website	EndCall			
	No message when phone number is not found Credit Card #	t Auto Launch URL/EXE Launch	V Auto Queue Logout Help			
	(RECENCE)	10/10/2020				
	Note used/Later use	Note used/Later use	Email Response:			
		1	Disposition: Qualified			
	Note used/Later use	Note used/Later use	Update			
] [Update with Reminder			
	Note used/Later use	Note used/Later use	Send SMS Text Message			
	Note used/Later use	Note used/Later use	Cat History:			
		1	Record ID Number Dialed First Name			
	Note used/Later use	Note used/Later use				
			<			

Additional Custom Fields 1 to 12: A custom field that can be set by the call center manager.

Reminders

Reminders are set when the agent uses the "Update with Reminders" button. Simply double click on any reminder to see the details. Reminders are automatically launched when the date/time becomes relevant.



Id: Database id of the reminder.

Date/Time: Date/Time that the reminder will be launched. **Information:** The information related to the reminder.

<u>Scripts</u>

Scripts are used so that agents can have pointers/information available to them in order to best serve their clients. Multiple scripts are supported.



Script: The script text.

Script name: The reference name for each individual script.

Refresh: When the script is updated by supervisor/call center manager, simply click on refresh to see the latest script information.

Statistics





Period: Select the period that you want displayed on the graph. **Refresh:** Simply click on refresh to see the latest information.

Integrated CRM Web Page

Used to show the CRM webpage that was previously loaded/configured, and that is populated at time of incoming call. Check Agent Interface config file setting - "IntegratedWebItfc", set to true.



Configuration

The configuration settings are used to connect the Agent Interface to the Predictive Dialer SQL database and 3CX IP PBX, as well as set the agent extension number, interface (3CX/Direct), date format (if the Predictive Dialer operating system uses a different date format from the agent interface operating system) and the administrator password, used to access this configuration tab to make changes.

🗫 MDLsolutions.Inc. Agent Disposition Interface - Ver 3.34 (Connected)			
Options Help	300		
🖷 Agent Interface 🙀 Reminders 🗊 Script 🖂 Statistics 💰 Configuration			
- Configuration file settings			
SQL String: Server=10.10.21\SQLEXPRESS(Initial Catalog=MDLsolutionsDialer)User ID=sa,Password=mediagw12341;	Update		
Extension: 101			
3CX Network Controller: 10.10.2.2			
Interface: 3CX (3CX or Direct)			
Date Format: Default			
Dialing Prefix: None Set to None' if not used.			
Remove digits from caller id: 1 Set to None' if not used.			
Admin Password: default Set to 'None' if not used.			
3CX Queue Map/Company: 0			
Info (Troubleshooling)	{i		
	0		
1	<u>×</u>		

SQL String: The SQL string that is used to connect to the Predictive Dialer SQL database. Usually the IP address is the only value you need to change.

Extension: The agents 3CX extension.

3CX Network Controller: The IP address of the 3CX computer/operating system.

Interface: Set to 3CX if you are using 3CX as your IP PBX, otherwise Direct.

Date Format: If the date format of the Predictive Dialer operating system is different from the Agent Interface computer, then set the date format here.

Admin Password: Set the password for making changes to the Agent Interface configuration tab here.

Dialing Prefix/Remove digits from caller id: If you use a dialing prefix in the call records that 3CX uses to route calls, then input that under Dialing Prefix. If the caller id does not match your call records, then remove the leading numbers until it does.

AgentAltQueue: Which is only found in the AgentDispositionInterface.exe.config file in the Agent Interface application folder under Program Files, is used when an Agent Is receiving calls from an incoming 3CX queue and from the Predictive Dialer at the same time. The "AgentAltQueue" value needs to be set to the extension number in the incoming 3CX queue. This will then allow the Agent Interface to manage all the agents calls correctly.

Info(Troubleshooting): Please email any error information you receive in this text box to support@mdlsolutions.com.

1 Step Call Processing

The agent has the option to use either 3 step call processing or 1 step call processing. 1 step call processing automates almost all of the call process steps (end call, update call record and log back into queue) when processing a call, by simply selecting the disposition, using the disposition drop down box.

Agent Interface Configuration					
Help - Before this application will work and assist you in setting the call dispositions and client details on incoming agent calls. You need to set the five settings below. You can also set these settings in the "AgentDispositionInterface.exe.config" file in the application directory. [Only use notepad.exe]					
1. Set the IP address in the 'SQL String' value to the IP address of the Dialers SQL database. (Will be encrypted.)					
SQL String:	Server=192.168.0.1\SQLEXPRESS;Initial Catalog=MDLsolutionsDialer;User ID=sa;Password=mediagw;				
2. Set the 'Exter extension numb then this is one	nsion' value to the extensioners (only number not IP ad of the extension numbers	on the agent will be using. If you are using the "Interface" = "Direct" then this is one of the Idress) in the "Phone System Transfer List" in the dialer. If you are using "Interface" = "3CX" in the 3CX queue.			
Extension:	101				
3. (3CX Only) Set the '3CX Network Controller' value to the IP address of your 3CX phone server that is running our 3CX plug in.					
3LX Network	Controller: 192.168.0.2				
 4. '1step' will complete all the steps (end call, update call record and log back into the queue) by just clicking on the disposition. '3step' will require 3 steps to complete each call, but allows for more control/options. Call Process Step: 1step 					
5. Set the "Interface" value to "Direct" if you are NOT using 3CX and are transferring your calls directly to VoIP phones. If you are using 3CX and transferring the calls to a queue within 3CX set the "Interface" value to "3CX".					
Interface:	3CX	(3CX or Direct)			
6. Date format o	of Predicative Dialer comp	uter/server (if set incorrectly SQL will return an error).			
Date Forma	t Default				
7. Admin passw	ord (Used to view/change	the Agent Interface configuration settings. Will be encrypted. Can be left as default.)			
Password:	default				
Password:	default	Confirm			
	1				
		Update Cancel			
		Page 35			

Once the Agent Interface has been configured to use 1 step call processing using the Agent Interface configuration application (ConfigApplication.exe), found in the Agent Interface application folder or at time of installation, the Agent Interface will then display '1 Step Call Process Enabled', below the disposition panel. Once the call has ended and the agent has entered all the necessary information, all the agent needs to do is simply select the disposition he requires, and then wait for the next call.

🎐 MDLsolutio	ons,Inc. Agent Disposition Interface - Ver	3.35 (Connected)	
Options He	łp		
He Agent Inter	face 🧕 Reminders 📶 Script 🖂 Statistics	🗟 Configuration	#SL COLUTION
Record ID:	103412 Caller ID: 9132977426	Campaign: Default	1 Step Call Process Enabled Interface: 3DX
First Name:	Mike L	ast Name: Mareena	Status: Call Ended
Email:	mmareena@jparts.com S	SN: DOB: 1/1/1900	Date Processed: 11/8/2013 7:40:00 PM
Address 1:	54988 Fifth	Address 2: Suite 22R	
City:	CA State: CA	Postal Code/Zip: 99940	Country.
Company:	ABC Max Tracking ID: AA-S	2213	Controls
	Product	Price	Ready to receive calls
	Product Z	653.00	Record Off
	Category	Webste	End Cal
	No mercane when phone number is not found	24	Make Call
Search Field:	Telephone Number Search Value: 91	12977426 Search	Auto Queue Logout
Survey.			Email Response:
C 1			Disposition: Qualified
Comments;		Update	
	Updated: Wednesday, September 23, 2013 - 204 PM By Agent Extension [101]		
	Last Updated: Wednesday, September 25,	Send SMS Text Message	
Preview Diat		2 2	Call History:
	Record ID Number Dialed First Nar	ne Last Name DDB Addre	ess and a second se
	-		
Agent extension	101		
Agent Interface Receiving Inbound Calls

When an inbound call (caller id) is received for the first time through a 3CX queue that the agent is connected to, the agent interface will notify the agent that the caller id does not exist, if it cannot be found in the current predictive dialer call list/s. It will then give the agent the option to add the number/caller id, and enter the clients information.

MDL solutio	ns.Inc. Agent Disposition Interface - Ver 3.36 (Connected)	
Options Hell	9	whit totution
Record ID:	Caller ID:	Interface: 3DX
First Name:	Last Name:	Status: Active Call
Emait	S\$N: DOB:	Date Processed
Address 1:	Address 2	
City:	State: Postal Code/Zip:	Country
Company:	Tracking ID:	Controls
	Product MDLselutions - Agent Interface	Stop receiving calls
·	Category No record exists for this number: 7149758471, would you like to add this numb	er? End Call Make Call
Search Field	Search Value:	Auto Queue Logout Help
Survey		Email Response: Second
Comments		Update
		Update with Reminder
		Send SMS Text Message
Preview Diał:		Call History:
	neuviu no rivunuen Dialegi Frist Name Last Name DUB Addies	
leant astancius	101	

Once the agent has entered all the required client information into the agent interface, all the agent needs to do is select a relevant disposition and click update.

Contraction and the second second	103467 Caller ID: 7149758471	Campaign: Defau	ult Interface: 3DX	
First Name:	John	.ast Name: Dobler	Status: Active Call	
Emait [idoubler@inb.com	SSN: DOB:	Date Processed.	
Address 1: [987 Harold St	Address 2: Apt D		
City: [San Fel State: CA	Postal Code/Z	ip: 90011 Country: USA	
Company:	FNB Tracking ID:		Controls	-
1	Product	Price	Stop receiving calls	
[Product Z	59.00	Record Off	
~	Category	Website	End Cal	
			Make (Tail
	No message when phone number is not found.	Auto Launch URL/EXE	unch	
arch Field	Search Value:	Searc	ch 🖌 🖂 Li Auto Queue Logout 🔶 Help	£
Survey			Email Response:	Y
			Disposition:	v
Comments			2 Undate	
			Hadata alle Provider	-
			Opdate with Heninder	_
			Send SMS Text Message	_
eview Diał:			Call History:	

**View "Inbound Calls/Automatic Call List Creation" under the Call Center Manager section, to view the automatically created inbound call list.

Configure Agent Interface for Inbound Calls with Unique Call Lists

By default if an inbound call is received, the predictive dialer will create a general inbound call list. However in some situations it may be required that unique call lists are created for inbound calls depending on the 3CX queue the calls are originating from.



In order to accomplish this the following steps need to be completed.

The first step is to set the "MapQueueToCompany" value to "True" in the AgentDispositionInterface.exe.config file. For each agent interface.

The second step is to create a 3CX Queue with a "Name" that will be used to create the inbound call list in the predictive dialer. Below we have used "Company Name A".

Collections hald collected a second contribution		
 Cali queues noid calis in a queue until an agent is a 	avaliable to answer the call	
eneral		
Configure the Number, Name, and Time-out of queue)	
Virtual Extension Number	800	0
Name	Company Name A	0
Polling Strategy	Round Robin	- 0
Ring timeout(seconds)	30	
all Queue Agents	15 15 21 BI	12 12
Select which extensions will be agents for this Call Qu	jeue, User must also login to the Call Queue to :	start taking calls.
Extensions	Members	
100 agent one	101 agent two	
102 agent p1 agent	dd 150 Call Center Supervisor	Up
103 agent p2 103		
104 agent p3	nove	Down
120 Extension 120 Agent 😽	20	
Add External Agent Number	Add Edit 🥥	
88. JCHC 88	, <u></u>	
estination if no answer		
Select a destination for this call if it reaches Maximum	I Queue Wait Time, if no agent is logged in, or if	caller presses the *
O End Call		
Connect to Extension	100 scent one	- 0
	100 agent one	
Connect to Queue / Ring Group	820 Phone1	
Connect to Digital Receptionist		- 0
O Voicemail box for Extension	100 agent one	
		and a second

The third step is to route calls coming in from your VoIP provider/VoIP gateway to the 3CX queue you just created.

Edit Port :19132977427				
pip Provider port no 19132977427 on SoTel		-	State Sector	
Virtual Extension Number (Unique)		10000	0	
Authentication ID		19132977427	0	
Authentication Password		*****	0	***
3 Way Authentication ID			0	
Port identification		19132977427	0	
Onfigure where calls should be routed during office ho	urs.	100 scent one		- 0
onfigure where calls should be routed during office ho © End Call © Connect to Extension	urs.	100 agent one		• 0
onfigure where calls should be routed during office ho C End Call Connect to Extension O Connect to Queue / Ring Group	urs.	100 agent one 800 Company Name A		• 0 • 0
Configure where calls should be routed during office ho C End Call Connect to Extension Connect to Queue / Ring Group Connect to Digital Receptionist	urs.	100 agent one 800 Company Name A		• 0 • 0 • 0
 configure where calls should be routed during office hor Connect to Extension Connect to Queue / Ring Group Connect to Digital Receptionist Voicemail box for Extension 	urs.	100 agent one 800 Company Name A 100 agent one		× 0 × 0 × 0
 Configure where calls should be routed during office hor End Call Connect to Extension Connect to Queue / Ring Group Connect to Digital Receptionist Voicemail box for Extension Forward to Outside Number 	urs.	100 agent one 800 Company Name A 100 agent one		• 0 • 0 • 0 • 0
onfigure where calls should be routed during office ho Call Connect to Extension Connect to Queue / Ring Group Connect to Digital Receptionist Voicemail box for Extension Forward to Outside Number Send fax to	urs.	100 agent one 800 Company Name A 100 agent one email of extension 888		× 0 × 0 × 0 × 0 × 0
Configure where calls should be routed during office how Connect to Extension Connect to Queue / Ring Group Connect to Digital Receptionist Voicemail box for Extension Forward to Outside Number Send fax to Send fax to Set up Specific Office Hours	urs.	100 agent one 800 Company Name A 100 agent one email of extension 888 Set up Specific Of	fice Hours	· 0 · 0 · 0 · 0 · 0 · 0

When an inbound call (caller id) is received for the first time through a 3CX queue that the agent is connected to, the agent interface will notify the agent that the caller id does not exist, if it cannot be found in the current predictive dialer call list/s. It will then give the agent the option to add the number/caller id, and enter the clients information.

	Caller ID:		Campaign:		Interface: 3CX	
irst Name:	2 17 18 17	Last Name:			Status: Active Call	
Emait		SSN:	DOB:		Date Processed	
Address 1:			Address 2:			
City:	State	:[]	Postal Code/Z	lip:	Country:	
Company:	Tracking ID	:[Cor	slott	
	Product MDLsolutions - Agent	Interface			Stop receiving	calls
arch Field:	🗌 No messar	Ves	No	ah 🕑 [L] A	uto Queue Logout	Make Call
Survey				C Emai	Response:	
Comments:				Dispo	stion: Update	
					Update with Re	minder
					Send SMS Text N	lessage
				👻 Call Hi	story	
aview Diał:						

If the agent chooses to add the new caller id/client information, the agent interface will automatically populate the "Company" field with the 3CX queue name. This "Company" information will be used to create the inbound call list name in the Predictive Dialer.

Record ID:	103469	Caller ID:	7149758471		Campa	ign: Default		Interface: 3CX	
First Name:				Last Name:				Status: Active	e Call
Email				SSN:		DOB:		Date Processed:	
Address 1:					Address 2	: [
City:			State:		Po	stal Code/Zipx		Country:	
Company:	Company Name	2	Tracking ID:					Controls	
	Product			Price				Stop rece	eiving calls
	Calegory			halabeita				Rec	ord Off
	Calegory			WEUSRE			-	Enx	i Cal
6	No message	when phone a	number is not foun	d. 🔲 Auto L	aunch URL/EXE	Launch		1	Make Call
arch Field:		~	Search Value:			Search		Auto Queue Logout	Help
Survey:							~	Email Response:	8
200000000000000000000000000000000000000								Disposition:	6
Comments:								Up	date
								Update wi	th Reminder
								Send SMS 1	Text Message
eview Diat							4	Call History:	
	Record ID	Number Diale	ed First N	lame l	ast Name	D08	Addr	ess	

Once the agent has entered all the required client information into the agent interface, all the client needs to do is select a relevant disposition and click update.

Record ID:	103469 Caler ID: 7149758471		Campaign: Default	Interface: 3CK	
First Name:	Tom	Last Name: Tredstun		Status: Active Call	
Emait	ltrendstun@cna.com] SSN:	DOB:	Date Processed:	
Address 1:	789 Task St	Ad	tress 2: Apt Y		
City:	San Migual State:	CA.	Postal Code/Zip: 9046	7 Country: USA	
Company:	Company Name A Tracking ID:			Controls	
	Product	Price		Stop receiving cal	18
	Category	Website		Record Off	
				EndCal	C
	No message when phone number is not f	ound. 🔲 Auto Launch UF	L/EXE Launch		Make Call
earch Field:	Search Value	e [Search 💉		нер
Survey			0	Email Response:	~
Comments:			2	Disposition: Fresh Lead	2
				Update	4.4
				Send SMS Text Next	an a
				Call History	nagee.
review Diat	Record ID Number District C	at blama Last blama	009		

**View "Inbound Calls/Automatic Call List Creation" under the Call Center Manager section to view the automatically created unique inbound call lists.

3: 3CX Plug-in

3CX Plug-in

The 3CX Plug-in is used for connecting the Predictive Dialer and Agent Interface to the 3CX IP PBX. Simply install and launch this application, everything else is automated. If you minimize this application, it will hide itself in the operating system tray. Just right click on the 3CX Plug-in tray icon to restore.

🖶 MDLsolutions 3CX Predictive Dialer-CRM Network Plug-in Version 1.23 (Production Version for 3CX Version 10 CCE)	
Transactions 9CX Extension length is set to: [3] 12/1/2011 3:21:28 PM - Listening on port:6002 Running	×
Extended error information:	M
Enable transactions (for debugging only) Close	Clear

Transactions: Shows all plug-in transactions, used by MDL solutions support.

Extended error information: Please email any error information you receive in this text box to support@mdlsolutions.com.

Enable transactions: For use by MDL solutions support.

Close: If you close this application the Predictive Dialer/Agent Interface will no longer work with 3CX.

Clear: Clears the transactions, used by MDL solutions support.

4: Call Center Manager

(Call Center Monitoring, Performance Graphs, Reports, and Agent/Call Center Management)

Statistics/Graphs/Analytics

The Statistics/Graphs/Analytics used to monitor the call center real time displaying call, agent, call list, channel information and call center analytics/performance graphs.

Call	overview	graphs.

	Manager Dashboar	ra - version 3.3.3				
Help						
Chattanting (Country)	÷ Call Links Managan	and Annat Defermine	n /Custam Danasta	Call Dasanda	Curtan Catting	
Statistics/Graphs	Can Lists Managen	nent Agent Performanc	e/System Reports	Call Records	System Settings	n Hite
stem Overview Graphs	Call List Graphs	Dialer Total Calls: 4	Calls Per Minute	e: 0 Activ	e Channels: 0	Agents Waiting For Calls: 1
						All graphs are measured in calls per mi
			Dialer Total Calls			
24					1	Total Calls Placed
1.8	-				_	Calls Not Answered
1.2						Calls To Fax or VM
U	þ	10 15	s 21	F.	25	
24 18 12 0.6						Calls Answered Calls Not Answered Calls Not Answered Calls To Fax or VM
0	5	10 15	20	25		Default 😽
nt Performance X	kgent List					
in renormance in r						
Performance of the						
s Performance						
3-7						Call List Calls Placed
3 24 1.8	-10				<u> </u>	Call List Calls Placed Calls Answered Calls Not Answered
3 24 18 12						Call List Calls Placed Calls Answered Calls Not Answered Calls To Fax or VM
2 Portonumerol 24 18 12 05 0						Call List Calls Placed Calls Answered Calls Not Answered Calls To Fax or VM

Dialer Total Calls: Total calls made in all call lists, that have not been reset.
Calls Per Minute: Total calls made per/every minute by the dialer.
Active Channels: Total channels being used by the dialer simultaneously.
Agents Waiting For Calls: Total agents waiting for calls to be transferred.
Status: The system status RUNNING, STOPPED and COMPLETING.
Start Calls: Click on green arrow/server at the top left.
Stop Calls: Click on red arrow/server at the top left.

Performance Graphs:

All performance graphs are broken down as follows:

Blue = Total calls placed.

Green = Calls answered.

Red = Calls not answered.

Yellow = Calls answered by a fax machine or by an answering machine/voice mail. *First Graph:* Total calls placed in all call lists.

<u>Second Graph</u>: Total calls placed for the selected agent group.

Third Graph: Total calls placed in the selected call list.

Call list/agent overview information.

Lsolutions Call Center	Manager Dashboard	Version 3.3.5							
Help									147 - 14
1 3 3	÷								
Statistics/Graphs	Call Lists Manageme	nt Agent Perfo	rmance/Syst	em Reports	Call Reco	ords Syste	m Settings		
stem Overview Graphs	Call List Graphs	Dialer Total Calls:	4	Calls Per Minute	: 0	Active Channel	s: 0	Agents Waiting Fo	r Calls: 1
							"All g	iraphs are measure	d in calls permi
			Dialer	Total Calls					
10				Ű		Ť.		Total Calle As	lls Placed
6			- 3	1				Calls No	t Answered
2			3	8			ŝ	Calls 10	Fax or VM
0	5	10	15	20	8	25			
0751	07	1.82.1	11.064	202	2	12396			
40.									
MACAddress	IPAddress	Extensio	n Age	nt Status				Last Status	Update
0003EE6AE647	192 168 2 164	101	Rea	ty to receive	calls			Nov 8 2013	12:50PM
ient Performance Ag	ent List × anne Creater	d Active	Records	Records		Status	Agent Gro	up (Campaign
ARD Daws Oak	Unt DOVOCH	0 1	4	A		a set oper of	Defeult	-81	
Demo Call	List 09/25/1	a 1	4	4		Activated	Derault	Jen Jen	erauit
all List Performance	Call List ×								
STOPPED									

CALL LIST GRID

MACAddress: MAC Address of the computer that the Agent Interface is installed on. IPAddress: IP Address of the computer that the Agent Interface is installed on. Extension: Extension of the agent.

Agent Status: If the agent is ready to receive calls or is on a call.

Last Status Update: The last time the agent clicked on "Ready to receive calls".

CALL LIST GRID

"Call List Name"= Name of the call list.

"Created"= Date the list was imported.

"Active"= If the list is activated for dialing.

"Records"= The number of records in the call list.

"Records Processed"= The number of records processed in the call list.

"Status"= If the list is active, deactivated or complete.

"Agent Group"= The agent group that the call will be transferred to, for this call list.

"Campaign"= The campaign associated with the call list.

Call Center Performance Graphs/ Analytics (Real-Time).



"Transfer results/Donut graph"= Shows the total amount of calls placed by the dialer, that are either transferred to agents or that were not transferred to agents.

"Call Transfer Results/Pie graph"= Shows the total amount of calls in the call center that are transferred to agents and how those calls were dispositioned/processed.

"Leads Called to Sales Revenue/Bar graph"= Shows the total amount of calls in the call center that were placed, and the revenue made from theses leads. Requires certain custom fields to be populated. Check Import form, under Call Lists tab.

"Agent Performance/Bar graph"= Breakdown of calls transferred/dispositioned to agents.

Further breakdown can be done by using the "Disposition" and "Call Lists" drop downs.

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Call Lists

The Call Lists tab is used to upload and manage your imported call lists. Currently only comma delimited text files can be imported. Multiple call lists can be run simultaneously and if need be you can set different call lists to call centers teams/agent groups.

📽 MDL	solution	ns Call Center	Manager Da	shboard - Vei	rsion 3.3.5					
File	Help									
	0	0	÷.							0
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	100	Demo Call L	ist	09/25/13	1	4	4	Activated	Default	Default
	101	General Nu	nbers	10/29/2013	0	8	0	Deactivated	Default	Default
	102	Sales Call L	ist	10/29/2013	1	8	0	Activated	Default	Default
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-									(Call List totals	are updated every 30 seconds.)
		Reprocess Call	That Where N	ot Transferred To	An Agent	,	Activate Call List	For Dialog	im	port ESV Call List
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Reprocess Calls That Where Not Transferred To An Agent: Reprocess all calls that where not transferred to an agent.

Reprocess Calls with Disposition: Reprocess calls that have a certain disposition. Scrub duplicate telephone numbers from all call lists: Scrubs duplicate telephone numbers from all call lists.

Activate Call Lists For Dialing: Activate the selected call list for dialing.

Deactivate Call Lists For Dialing: Deactivate the selected current call list so it is no longer dialed.

View List/Change Agent Group: View the selected call list details and if need be change the "Agent Group/Call Center Team" for the call list.

Import .CSV Call List: Import comma delimited text file.

Export Call Lists.

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105	Demo Call List	09/25/13	1	4	32	Activated	Default	Default
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Export Call List/Call List Results to .CSV: Export a summary of the call list and results to .CSV file. To include all call list fields, simply click on "Include All Fields".

Delete Call List: Delete selected call list.

Backup Call List: Backup call lists for later use.

CALL LIST GRID

"ID"= Record id.

"Call List Name"= Name of the call list.

"Created"= Date the list was imported.

"Active"= If the list is activated for dialing.

"Records"= The number of records in the call list.

"Records Processed"= The number of records processed in the call list.

"Status"= If the list is active, deactivated or complete.

"Agent Group"= The agent group/call center team that the call will be transferred to for this call list.

"Campaign"= The campaign associated with the call list.

Backed Up Call Lists

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	ID	Call List Name	Created	Active	Records	Records Processed	Status	Agent Group	Campaign
•	102	Sales Call List	10/29/2013	1	8	0	Activated	Default	Default
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				Vie	willist	Restore Call Lis	it 👘		
Statu	STO	PPED							

View List: View backed up call list. Restore Call List: Restore backed up call list.

CALL LIST GRID

"ID"= Record id.

"Call List Name"= Name of the call list.

"Created"= Date the list was imported.

"Active"= If the list is activated for dialing.

"Records"= The number of records in the call list.

"Records Processed"= The number of records processed in the call list.

"Status"= If the list is active, deactivated or complete.

"Agent Group"= The agent group/call center team that the call will be transferred to for this call list.

"Campaign"= The campaign associated with the call list.

Search Call Lists

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ID	Phone #	Company	First Name	Last Name	Tracking ID	SocialSecurityNum	DOB	RecordProcessed	Proc
1033	345 9132977426	ABC Max2	Fred	Plinter	JL-69023		1/1/1900	1	11/8
1033	344 91 32977426	ABC Max1	Bob	Barker	SD-67899		1/1/2000	1	11/8/
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- "Recoil sch By: {	rding is only suppor Disposition	ted in Bridge Mode.	Search Onteria: 🖸	mplete		Search Records			

Search By: You can search all the call lists using several different fields (Phone Number, Last Name, Process Date, Disposition, Address, City, State, Zip and Agent Extension).

Search Criteria: Enter the related field search criteria to search for. **Search Records:** Click to start search.

Call Recordings: Please check "Search Call Lists" under the dialer section, to retrieve call recordings.

CALL LIST FIELD GRID

See Agent Interface for details on call lists fields.

Call Records

The Call Records/Reports tab displays all the calls that have been made by the Dialer/Predictive Dialer.

Statistics/	Graphs Call Lists Ma	inagement Agent Perfo	mance/System Reports	Call Records	System Settings	
all Records						
ID	Dialed #	Call Start Time	Call End Time	Call Length	Call Term Status	Chan ‡
906	9132977426	11/9/2013 10:48 AM	11/9/2013 10:48 AM	2	EV_TRANSFERRED	1
807	9132977426	11/9/2013 10:48 AM	11/9/2013 10:48 AM	5	EV_TRANSFERRED	
806	9132977426	11/9/2013 10:48 AM	11/9/2013 10:48 AM	1	EV_TRANSFERRED	1
805	9132977426	11/9/2013 10:48 AM	11/9/2013 10:48 AM	2	EV_TRANSFERRED	1
804	9132977426	11/9/2013 10:48 AM	11/9/2013 10:48 AM	5	EV_TRANSFERRED	1
803	9132977426	11/9/2013 10:47 AM	11/9/2013 10:47 AM	9	EV_TRANSFERRED	1
802	9132977426	11/9/2013 10:47 AM	11/9/2013 10:47 AM	3	EV_TRANSFERRED	Ð
801	9132977426	11/9/2013 10:47 AM	11/9/2013 10:47 AM	4	EV_TRANSFERRED	1
900	7148381831	11/9/2013 10:47 AM	1179/2013 10:47 AM	36	EV CALL NOT ANSWERED	1
800						
000						

Load Call Records: Input the amount of call records you want displayed, and then click on Load Call Records.

Search Records By: Allows you to search call records by "Dialed Number", "Call Term Status" and "Custom Field 1".

Delete All Call Records: Completely delete all call records. Call records are automatically deleted after 7 days, but this can be changed in the dialer config file.

Call Record Grid:

ID: Record id. Dialed #: Number that is dialed. Call Start Time: The time the call started. Call End Time: The time the call ended. Call Length: The length of the call in seconds. This will be set if the Agent uses the Agent Interface.

Call Term Status: What was the status of the call, idle (no answer/disconnected) or transferred (to an agent). Chan #: The Predictive Dialer channel the call is placed on. # Of Enquiries: Reserved.

Agent Performance Overview/Call Center Reports

The Agent Performance Overview tab displays important real-time information about the agents in the Call Center, and provides call center reports.



View: Allows the manager/supervisor to view the current real-time call center agent information, as well as up to 7 days in the past.

Agent Performance Graph: Allows the manager/supervisor to view the current realtime per agent call performance graph.

Export View to .CSV file: Any View can be exported to a .CSV file for further examination/processing.

Agent Performance Grid:

Agent Extension: The extension number of the current agent.

Current Agent Status: If the agent is ready to receive calls or is on a call.

Calls Received: The total calls received for the day.

Average Time On Calls: The average time (in seconds) the agent has spent on all the calls he received for the day.

Current Campaign: The campaign the agent is working on/receiving calls from.

Current Agent Group: The Agent Group the agent is assigned to/part of.

Calls Per Hour: The amount calls the agent received in the last hour.

Agent First Active: When the agent received his first call for the day.

Agent Last Active: When the agent received his last call for the day.

Reports:

Reports: Simply select a report from the options displayed in the drop down box. Then set the start date and end date of the calls/data you want in your report, then click "Run".

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	Agent Totals	
	Agent 101 Total Calls 8 Total Sales 673.00	
	Agent 102 Total Calls: 11 Total Sales: 1658.47	
	Agent 103 Total Calls, 6 Total Sales 904.62	
	Agent 105 Total Calls 2 Total Sales 301 54	
	Agent 106 Total Calls: 5 Total Sales: 452.31	
	Agent 107 Total Calls: 1 Total Sales: 150.77	
	Agent 108 Total Calls: 3 Total Sales: 301 54	
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and the second second	Agent 111 Total Calls 1 Total Sales: 150.77	
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Detailed performance extension information. Enables the call center manager to view the records processed for each agent in each call list for all or for specified dispositions.

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Call List: The cal list that the agent has processed call records in. **Records Processed:** The amount of records processed in that call list. **Filter By Disposition:** Filter results by a specific disposition. Detailed performance extension information. Enables the call center manager to view the call answered for each agent in a bar graph view.



Calls Answered: The total amount of calls answered by the agent selected, for the period shown.

Agent Dropdown: Used to select the agent extension, that will be viewed in the graph.

Agent Administration

The Agent Administration tab, enables the call center manager to set a username and password for the agents, for login/logout purposes, or to set system wide Agent Interface settings.

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	ID E	xtension	Username	Password	Required	Button On/Off	Auto Logout	Auto Launch	Message
	1 10	21	101	dfg567!	1	1	1	0	0
	4 10	12	102	ffds22!	0	1	17	0	0
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p – smar ow i ture out f nes i	You can contro trie and passwo s except for log seture/stop red in .*No Number Extension:	I some of the ord for the setting the ging in and eiving calls Wessages" Username	he settings of your Agent Internet extension and then set "Login For extension number first and it the recording button. Settings, feature after the agent receive = Checks the feature that stop s	aces and the ability to ask lequired to "1", this also e len selecting "0" for "off" Description: "Record Butt se a cal "Auto Lsunch" = s a cal "Auto Lsunch" = s a cal "Auto Lsunch" = s the Agent Interface from Password	them to login using the natives the oblifty to run m"1" for "on" for the fe on On XP(1" = Twrns the Checks the auto URL is displaying a message Login Required	settings below, 1. Log login/ogout reporting. Journe you want enable Agent interface record unch resture, that auto when a number contest t. Record Button On/	ging in is requested 2. Turning on or off Ing button on or off. restocally launches i in that is not in the Off: Auto Logout	by the Agent Interfe some of the Agent in the area "Auto Lagout" = Ch dialer database. Auto Launch:	ace when you set Interface features fy to set all these ecks the auto que ce when a cal No Number Mess
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Extension: The extension of the Agent Interface/Agent.

Username: The login username for the Agent Interface.

Password: The password for the Agent Interface.

Login Required: Set to 1 if you require the Agent Interface to login, otherwise 0.

Record Button On/Off: Set to 1 if you require the Agent Interface "Record Call" button to be displayed on the Agent Interface, otherwise 0.

Auto Logout: Set to 1 if you require the Agent Interface "Auto Logout:" check box to be checked on the Agent Interface, otherwise 0.

Auto Launch: Set to 1 if you require the Agent Interface "Auto Launch:" check box to be checked on the Agent Interface, otherwise 0.

No Number Message: Set to 1 if you require the Agent Interface "No Number Message" not to be displayed on the Agent Interface, otherwise 0.

The Agent Groups/Predictive Dialing Algorithm tab, enables the call center manager to set the Predictive Dialing Algorithm, and setup agent groups/call center teams.

The administrator will only need to create a separate agent group if multiple calls lists need to be run at the same time and transferred to different sets of extensions/3CX queues, commonly known as call center teams or agent groups. If this is not required just leave the default settings.

Example: If you have 4 agents that will work with English calls and 4 agents that will work with Spanish calls, and you have an English call list and Spanish call list, then you can create 2 agent groups/call center teams. You can simply do this by adding one agent group record with 4 "Simultaneous Dialer Channels" and name it English Team and add another agent group record with 4 "Simultaneous Dialer Channels" and name it Spanish Team. Remember to make sure you enable both agent group records.

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				(O)
Statistics/Graphs Call Lists Management	Agent Performance/System Repor	ts Call Records 5	System Settings	
				12
Agent Performance Grid/System Reports Agent Gr	ouns/Predictive Dialing Algorithm	View Ace	nts Agent A	
			1112	
	a			(2001) (2002)
Predictive Dialing Algorithm: Medium (Medium call rate, some of	calls may have to hold in a queue)			
ID Group Name	Caller ID	SIP Contact=CallerID	Simultaneous Dialer Channels	Enabled
17 Default		0	1	1
HelpYou may want to assign a group of spent extensions(create	call center team) or queues to one or a s	al of callists, and then set a	rother aroun of agent extensions or a	eves to another set
of call lists. For example, you may have one group of agents that sp	beaks a specific language other than Engl	ish, and a set of call lists whe	ere that language preference is require	d. You can then send
a the calls from those language specific call lists over to the agent	s that speak that language.	male that you want are imad	to that once in when the dialar in startar	E Atter you have
completed this step please assign your groups to the extensions or	queues that you have under the 'Phone	System Transfer List". Only e	nabled groups will be used when you	start the Predictive
Daler. Groups that are not enabled can be stored for rater use.				
ID: Group Name:	Caller ID:	SIP Contact=CallerID:	Channel/s Assigned To Group:	Enabled:
		U M		U 💌
Licensed Channels: 20	Add Update	Delete		FAQ
Status: STOPPED				

Predictive Dialing Algorithm: Set the Predictive Dialer to the user selected algorithm. Options:

Exact: Makes sure there is an agent available for each call.

Medium: Medium call rate, some calls may have to hold in the 3CX queue.

High: High call rate, extra calls will be waiting in the 3CX queue.

Max: As many calls as possible, extra calls will wait in the 3CX queue.

Page 60

Group Name: The name of the agent group/call center team.

Caller ID: If supported by VoIP or PSTN provider, this will be the caller id that will be shown on the receivers phone when calls are placed. May require the dialers Bridge Mode feature. Tab "Configuration/Bridge Mode".

SIP Contact=CallerID: Reserved.

Simultaneous Dialer Channels: The amount of Predictive Dialer channels you want to set to the agent group/call center team. We recommend you assign at least one channel per agent.

Enable: Allows the administrator to enable or disable an agent group.

Add: Adds a new agent group.

Update: Updates selected agent group.

Delete: Delete selected agent group.

Agent Group(Call Center Teams) List Grid:

ID: Record id.

Group Name: The name of the agent group/call center team used in the "Phones/Queues" and "Call Lists".

Caller ID: The caller id for the agent group/call center team.

SIP Contact=Caller ID: Reserved.

Channels Assigned To Group: Amount of simultaneous channels assigned to the agent group/call center team.

Enabled: Allows the administrator to enable or disable an agent group/call center team.

View Agents

View agents is used for seeing which agents have launched their Agent Interface and are ready to receive calls, or are on a call.

	ter Manager Dashovaru - V	ersion 3.3.5				
Help						
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Statistics/Graphs	Call Lists Management	Agent Perform	ance/System Reports	Call Records	System Settings	
			l l	-	11	CD C
		C				
t Performance Grid/Sv	stem Reports Ager	t Groups/PredictiveD	ialing Algorithm	View A	dents	Agent Administration
				u		
MACAddress	IPAddress	Extension	Agent Status			Last Status Update
0003FF6AF547	192 168 2 164	101	Ready to receive calls	20 00 10 10		Nov 9 2013 10:46AM
0023AEB435FC	192.168.2.23	102	Not ready to receive c	als		Nov 9 2013 11:38AM

MACAddress: MAC Address of the computer that the Agent Interface is installed on. **IPAddress:** IP Address of the computer that the Agent Interface is installed on. **Extension:** Extension of the agent.

Agent Status: If the agent is ready to receive calls or is on a call.

Last Status Update: The last time the agent clicked on "Ready to receive calls". **Total Agents:** The total amount of agents connected to the predictive dialer.

Email Manager

The Email Manager is used to create a client response email/s for the agent/agent interface/s.



Email Name: Unique name used to identify the response email to the agent, through the agent interface.

Email Message: The user created email message along with the required call list fields that will be emailed to the client once the agent selects it, using the associated Email Name.

(Call List Fields-Passable): The following call list fields can be passed from the related client information on the agent interface, to the response email. They are [firstname], [lastname], [address1], [address2], [city], [stateprovince], [zippostal], [country], [trackid], [custom1] and [custom2]. Additional fields can be included upon request.

Agent Script

The Agent Script Manager is used to create an agent script/s response for the agent/agent interface/s, when talking to the client.

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Statistics/Graphs	Call Lists Managemen	t Agent Performance/System Report	s Call Records	System Settings	
nail Manager	Settings	Igent Scripts Custom Labels (Adent	Interfacei		
nt Interface Scripts		W			
cript Text:	Create a nev	w script by typing in a unique name (50 characters	nex), or select from the o	drop down of current scripts,	
sip: Please add or update	your agent interface scripts he	IE.			
		Add Update	Delete		

Script Name: Unique name used to identify the agent script to the agent, through the agent interface.

Script Text: The user created script text that will be read to the client once the agent selects it, using the associated Script Name.

Email Settings

The Settings tab is used to setup your companies information, which is mainly used in the reports, and to setup the emails (SMTP) settings for the agent response emails.

Statistics/Graphs Call Lists Management Agent Performance/System Reports Call Records System Settings Final Manager Settings Agent Scripts Custom Labels (Agent Interface) Company Information (Reports) Company Information (Reports) Company Name: MDL solutionsm Inc. Address: 1401 Tustin Ave, Sube 210 City: Sate Ana State/Province: CA Country: 32705 SMTP Email Settings (Agent Folow Up Emails) Email Settings (MDL solutions thark: you for you purchase!
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Email Manager Settings Agent Scripts Compary Information (Reports) Custom Labels (Adent Interface) Compary Nome: MDLsolutionsm Inc. Address: 1401 Tustin Ave, Stube 210 City Santa Ana State/Province: CA Country: 92705 SMTP Email Settings (Agent Follow Up Emails) Email Server (IP Address of Domain Name): 192.158.2.95 From Email Address: sales@mdisolutions con Email Subject: MDLsolutions thark you for you purchase!
Email Manager Settings Agent Scripts Custom Labels (Adent Interface) Company Information (Reports) Company Name: MDLsolutionsm Inc. Address: 1401 Tustin Ave, Sube 210 City Santa Ana State/Phovince: CA Country: 92705 Update: SMTP Email Settings (Agent Follow Up Emails) Email Server (IP Address or Domain Name): 152,158,2.96 From Email Address: sales@mdisolutions com Email Subject: MDLsolutions thank you for you purchase!
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From Email Address: sales@imdtsolutions.com Email Subject: MDLsolutions thank you for you purchase!
Email Subject MDEsolutions thank you for you purchase!
Username: sales@indisduitions.com
Password selso1
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Company Information

Company Name: Your companies name. Address: Your companies street address. City: Your companies city address. State Province: Your companies state/provincial address. Country: The country your company resides in.

SMTP Email Server Settings

Email Server (IP Address or Domain Name): The IP address or domain name of your companies SMTP/Email server. Email server must support SMTP.

From Email Address: The associated SMTP email address that you want used/displayed to your clients in your agents response emails.

Email Subject: The subject that you want displayed to your clients in your agent response emails.

Username: The username of the From Email Address.

Password: The password of the From Email Address.

Call Center Manager - Menu Options

File:

Configuration: Allows the user to determine which Predictive Dialer Database he wants to connect to.

Agent Interface Configurations:

Configure Survey Questions: Allows the call center manager/supervisor to setup a unique set of questions, in order to create a survey that the agents can use when speaking to their clients.

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File	Help						
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	ID	Call List Name	Created Active Rec	ords Records Processed	Status	Agent Group	Campaign
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	105	Demo Call List	0				Default
			Survey Question 1 (85 char max)				
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			Survey Question 7 (85 char max):			_	
			Survey Question 8 (85 char max):			- 1 ²	
			Survey Question 9 (85 char max):			-	
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				22 XX		(Call List totals	are updated every 30 seconds.)
		Reprocess Calls That Where	of Transferred To An Agent	Activate Call	List For Dialing	- 1 (Inc	ort.CSVCalList
	Reproce	sss Calls with Disposition		💌 🚺 Deactivate Ca	I List For Dialing	Export Call List	(.CSV)
	Scrub	duplicate telephone numbers h	n all call lists	View List/Char	nge Agent Group	Delete Call Li	t Backup Call List
Help -	Import an	y .CSV text file into the dialer t	clicking on "Import .CSV". These List's co	n easily be created through Micro	osoft Excel using the "S	Save As" feature under th	ne "File" menu option. Select
Status	STOP	PED					

Configure agent Dispositions/Call Rules: Allows the call center manager/supervisor to setup a unique set of dispositions/call rules, that can be used by the agents and the call center reporting.

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104	Test Call List	10/30/2013	0	8	8	Complete	Default	Default
105	Demo Call List	09/25/13	1	4	32	Activated	Default	Default
			Agent Dispos	sitions/Call P	Rules 🛛 📓			
			Dispositions:	6				
			Add to Do No	t Call List	~			
			Input/Update	Disposition Des	scription			
			Add to Do No	t Call List				
			Call Rule:		Days:			
			Mark Record	Complete - Defa	olt 🔽 0			
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			Call back in [0) [days] on	Busy or No Answer Update			
				212	14		(Call List totals	are updated every 30 sec
E	Reprocess Calls That Whe	ere Not Transferred T	o An Agent		Activate Call List F	or Dialing		poit .CSV Cal List
Reprocess	s Calls with Disposition			~	Deactivate Call List	For Dialing	Export Cal List	(CSV) 📄 Include Al
Scrub du	ublicate telephone number	s from all call lists			View List/Change A	aent Group	Delete Call Li	et Backup Call

Disposition: Select a current disposition or add a new one.

Input/Update Disposition Description: Enter or update a unique description for you disposition.

Call Rule: Select the call rule that you want to apply to the disposition.

Days: Call back days that apply to the call rule.

Call Back: Select the amount of days you want the dialer to wait before calling a client back if the clients number is busy or not answered.

Inbound Calls/Automatic Call List Creation

By default when an inbound call is received, the predictive dialer will create a general inbound call list (General Inbound Call List). All the same reporting and analytics are available for the inbound call list, as with outbound call lists. Also you have the option to "Activate" the inbound call list and call all the clients back that previously called.

Statistics/Graphs Call Lists Management Agent Performance/System Reports Call Records System Settings Image: Search Call Lists ID Cal List Name Created Active Records Records Processed Status Agent Group Cample 105 Demo Call List 03/25/13 1 4 0 Activated Default Default 113 General Inbound Call List 0 1 1 Complete Default Default	Call Lists Management Agent Performance/System Reports Call Records System Settings its Backed Up Call Lists Search Call Lists Call List Name Created Active Records Records Processed Status Agent Group Campaig Demo Call List 03/25/13 1 4 0 Activated Default Default General Inbound Call List 0 1 1 Complete Default Default	Call Lists Management Agent Performance/System Reports Call Records System Settings Call Lists Backed Ub Call Lists Search Call Lists Search Call Lists D Call List Name Created Active Records Records Processed Status Agent Group Cample 05 Demo Call List 03/25/13 1 4 0 Activated Default Default 13 General Inbound Call List 0 1 1 Complete Default Default	Graphs Call Lists Management Agent Performance/System Reports Call Records System Settings Backed Up Call Lists Search Call Lists Search Call Lists Search Call Lists Search Call Lists al List Name Created Active Records Records Processed Status Agent Group Campaignemo Call List on Call List 09/25/13 1 4 0 Activated Default Default emeral Inbound Call List 01 1 Complete Default Default	Call Lists Management Agent Performance/System Reports Call Records System Settings It Lists Backed Uo Call Lists Search Call Lists Search Call Lists Call List Name Created Active Records Records Processed Status Agent Group Carl Demo Call List 09/25/13 1 4 0 Activated Default Default Default General Inbound Call List 0 1 1 Complete Default Default	Call Lists Management Agent Performance/System Reports Call Records System Settings Call Lists Backed Up Call Lists Search Call Lists Search Call Lists Call List Name Created Active Records Records Processed Status Agent Group Camput 5 Demo Call List 0: 1 4 0 Activated Default Default 3 General Inbound Call List 0: 1 1 Complete Default Default	Call Lists Management Agent Performance/System Reports Call Records System Settings Lists Backed Up Call Lists Search Call Lists Search Call Lists Call List Name Created Active Records Records Processed Status Agent Group Camp Demo Call List 03/25/13 1 4 0 Activated Default Default General Inbound Call List 0 1 1 Complete Default Default
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You can view the inbound call you receive by selecting the inbound call list and clicking on the "View List" button, or run a report on the inbound call list.

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	103469	7149758471	Company Name A	Tom	Tredstun	ttrendstun@cna			1/1/1900	
					10.00					

If you have decided to create unique inbound call lists (see "Inbound Calls, Unique Call List Configuration" under the agent interface section), the predictive dialer will create a unique call list using the 3CX queue name that the inbound calls originate from. All the same reporting and analytics are available for the inbound call list/s, as with outbound call lists. Also you have the option to "Activate" the inbound call list/s and call all the clients back that previously called.

P	<u>e</u>							
Statis	tics/Graphs Call List:	s Management	Agent Perfo	rmance/Syst	tem Reports Call Rec	ords Syste	m Settings	
e Call I	Lists Backed Up Call I	Lists Search	Call Lists					
ID	Call List Name	Created	Active	Records	Records Processed	Status	Agent Group	Campaig
105	Demo Call List	09/25/13	1	4	0	Activated	Default	Default
115	Company Name A		0	1	0	Complete	Default	Default
							(Call List totals	are updated every?
	Reprocess Calls That When	e Not Transferred To	An Agent		Activate Call List	For Dialing	(Call List totals	are updated every: cort. CSV Call List
ергосе	Reprocess Calls That When	e Net Transferred To	An Agent		Activate Call List	For Dialing	(Call List totais	are updated every' sort CSV Call List (<u>LCSV)</u> _ Inck

You can view the inbound call you receive by selecting the inbound call list and clicking on the "View List" button, or run a report on the inbound call list.

and a set of	ilutions Call Center	Manager Dashboard -	Version 3.5.3						- 0
He	b								
)	P B		-						
/	Statistics/Graphs	Call Lists Management	t Agent Perfe	ormance/System Reports	Call Records	System Settings	£		
- 10			0					_	-
Call	List Record View								×
	ID Phone #	Company	First Name	Last Name	Email	Tracking ID	SocialSecurityNuml	DOB	B
	103467 7149758471	FNB	John	Dobler	jdoubler@fnb.com			1/1/1900	1
11	0.00	[63] I.							>
	110								9950
	10 25			-			~		-
der?	Group: Defaul	~	Update	Previous	Ne			Close	
Beer	0.0000000000000000000000000000000000000			67	10.000		75		_
2000									
2199 1	Scrub dublicate telepho	ne numbers from all call lists		View1	Jst/Change Agent Gro	up	Delete Call List	Backup (Call
2 ⁹⁴⁹	Scrub duplicate telepho	ve numbers from all call lists		View L	ist/Change Agent Gro	w 🚺 🛄	Delete Call List	Backup (Call

5: Configuration Tips

Configuring Agent Groups/Call Center Team

Start off by creating an Agent Group and assigning channels to it that will be used to make the calls for that Agent Group. Your total assigned channels must not exceed the amount of licensed channels that where purchased. The trial version includes 4 channels.

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Help										
1 3.	38	4								
Statist	tics/Graphs	Call Lists Mana	gement	Agent Perfor	mance/System	Reports Call	Records	System Settin	gs	
				6	1			1		03
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ent Perform	ance Grid/Svst	em Reports	Agent G	roups/Predictive	Dialing Algorithm	n	View Ad	ents	Agent /	Administration
		110								
dictive Dialin	ig Algorithm:	Medium (Medium	call rate, some	calls may have to	hold in a queue)					× (
ID	Group Nar	ne		11	Caler ID	SIP Contac	st=CallerID	Simultane	ous Dialer Channels	Enabl
17	Default					0		1		1
- You may a lists. For a se calls from	wart to assign exempte, you m those language	a group of agent ex sy have one group o specific call lists o	lensions(creat f agents that a	e call center tean speaks a specific ts that speak that	i) or queues to on language other th	e or a set of call list an English, and a se	s, and then set a t of call lists wh	mother group of ere that language	agent extensions or q	ueues to another ed. You can then a
) – You may al lists, For a re calls from for create an pyted this at ar. Orougs th	warf to assign example, you m those language agent group, si het are not enak	a group of agent ex ay have one group o specific call lists or pply create a unique in your groups to th led can be stored fo	lensions(creat f agents that ser to the agen group name a extensions or r later uso.	e call center tean speaks a specific ts that speak that and the amount of in queues that you	 a) or queues to on language other th language. simultaneous dial u have under the " 	e or a set of call list an English, and a se er channels that you Phone System Tran	s, and then set a t of call lists wh u want assigned sfer List*. Only o	nother group of ere that language to that group wi mabled groups v	agent extensions or q e preference is require then the dater is starte will be used when you	ueues to another d. You can then d. After you have start the Predictiv
) – You may al lists. For a re calls from for create an pyteted this at ar. Groups th Gro	ward to assign example, you m those language agent group, si het are not onak sup Name:	a group of agent ex sy have one group o specific call lists or nply create a unique ny our groups rough for led can be stored fo	lensions(creat f agents that ser to the agen group name a group name a r later use.	e call center tean speaks a specific ts that speak that and the amount of in queues that you Call	 a) or queues to on language other th language. simultaneous dial u have under the " ar ID: 	e or a set of call list an English, and a se er channels that you Phone System Tran SIP Cont	s, and then set a t of call fists wh J want assigned sfer List*. Only a act=CallerID:	nother group of ere that language to that group wi inabled groups v Channel/s/	agent extensions or q e preference is require then the dialer is starte will be used when you Assigned To Group:	ueues to another ed. You can then d. After you have start the Predictiv Enabled:
You may at lists. For a to calls from for create an price of the state in . Orouge th Gro	warit to assign example, you m those language agent group, si tep please assi het are not onak sup Name:	a group of agent ex sy have one group o specific call lists o pay create a unique pay call groups to th led can be stored fo	lensions(creat f agents that are to the agen group name a group name a r later use.	e call center tean speaks a specific ts that speak that and the amount of r queues that you Call	i) or queues to on language other th Ianguage. sinutaneous dial i have under the " or ID:	e or a set of call list an English, and a se er channels that you Phone System Tran SIP Cont 0	s, and then set a t of call lists wh u want assigned sfer List". Only o act-CalleID:	Inother group of ere that language to that group wi inabled groups v Channel/s	agent extensions or q e preference is require hen the daler is starte- vit be used when you Assigned To Group:	ueues to another ed. You can then i d. After you have start the Predictio Enabled: 0
You may al lists. For e so calls from "o create an pleted this st Gro Gro mand Charm	want to assign example, you m those longuage agent group, si het are not enait sup Name:	a group of agent ex ay have one group o specific call lists o nphy create a unique y cuer groups to th led can be stored fo	lensions(creat f agents that ser to the agen extensions o r later use.	e call center tean speaks a specific ts that speak that is that speak that r queues that you Calk	i) or queues to on language other th language. sihuftareous dal u have under the " ar ID: Update	e or a set of call list en English, and a se er channels that you Phone System Tran SIP Cont 0 Dates	s, and then set a t of call lists wh u want assigned sfer List*. Only o act=CalletID:	nother group of ere that language to that group wi enabled groups v Channel/s	agent extensions or q e preference is require nen the dater is starte vill be used when you Assigned To Group:	ueues to another ed. You can then d. After you have start the Predictiv Enabled 0
Now create 3CX queues using the Agent Groups you created above, and assign your extensions for that Agent Group/Call Center team. Note: The 3CX queues that you create in this Predictive Dialer tab will be automatically created in 3CX for you, by the Predictive Dialer.

1	ID Name		Extension/Queue	Group Name	Extension	ns In Queue
2	4 3CX Q	ueue	873	Default	101,150,1	00
leip -	- There are two options wh	n creating your transfe	r let.			
Help Help	- There are two options wh fou can simply use VolP soft	n creating your transfe	rr fist. Jept calls directly from the dale	, by setting the extension up this way	, "100@192.166.2.100"(ex	sample), "100" is the actual
telp - Yi - Yo	- There are two options wh fou can simply use VoIP soft ser/extension of the VoIP pho us can also use SCX P PBX.	n creating your transfe honesightones that acc he, and "192.168.2.100 Lick on the FAQ builton	r lict. Sept calls directly from the data I is the P address of the actua at the bottom left of the page to	r, by setting the extension up this way YOP phone. In this scenario features see how to use 3CXF.FAQ. Predictive	r *100@192.168.2.100*(ex like conference and transis Dider for 30X P PBX	ample). "100" is the actual fer are not supported.
telo I - Yi Vunb - Yo	- There are two options wh fou can simply use VoIP soft ser/extension of the VoIP pho co can also use 3CX IP PBX. - To select an extension to c	n creating your transfe honesightones that acc e, and "192.160.2.100 Dick on the FAQ builton date or delete, double	er list. Sept calls directly from the claie I's the P address of the actual at the bottom left of the page to click in the grey area next to th	r, by setting the extension up this way VOP phone. In this scenario features see how to use 3CX. FAQ: Predictive e extension you want to edit or delete	r "100@192.168.2.100"(ex like conference and trans c Dalar for 30X P PBX. Then edit the fields belov	ample). "100" is the actual fer are not supported. v and click update if you want to update
telp - Yi - Yo - Yo - Yo felp	- There are two options wh fou can singly use VolP soft ber/extension of the VolP pho ou can also use 3CX IP PBX. - To select an extension to extension, or just click delete	in creating your transfe transsiphones that exc ne, and "192-168.2.100 lick on the FAQ button date or detete, double o detete the extension.	er list. Tept cells directly from the dele I's the P address of the actua at the locition list of the page to click in the grey area next to th To add an extension, simply fill	r, by setting the extension up this way VoP phone. In this scenario features is see how to use 3CX. FAQ: Predictive extension you want to edite in the fields below and click add.	r *100@192.166.2.100*(ex Rice conference and trans a Dialer tor 3CX IP PBX. 5. Then edit the fields below	ample). "100" is the actual fer are not supported. v and click update if you want to update

When importing your call list, make sure you select the correct Agent Group, for your call list.

l Import		
Database Fields (Not all Phone Number:	fields required): Phone Numb	Record/D. Phone Number, Campaign, Company. First Name, Last Name, Email Address, Tracking ID, DOB, SocialSecurityNumber, Proc 103409,9132977426, Default ABC Max1, Bob, Barker, bob@abctech.com, SD-67899,171/2000 12:00.00 AM, 11/28/2013 12:49:00 PM 103410,9132977426, Default ABC Max2, Fred, Printer, fred@gen.com, JL-69023,171/1900 12:00.00 AM, 11/28/2013 12:50:00 PM, Tra 103410,9132977426, Default ABC Max2, Fred, Printer, fred@gen.com, JL-69023,171/1900 12:00.00 AM, 11/28/2013 12:50:00 PM, Tra
Secondary Number:	×	103411,913297/426,Default.ABC Max3, Lrag, Hamilton, chamiton/grariom.com, LU-61123,1717190012,00:00 AM, 10/28/201312/30 103412,9132977426,Default.ABC Max, Mike, Mareena, mmareena@jpats.com, AA-82213,1717190012,00:00 AM, 10/28/201312:49:0
First Name:	First Name 😿	
Last Name:	First Name 😿	
Email Address:	Email Addres 💌	
Company:	Company 🖌	
Tracking ID:	Tracking ID 👻	
Social Security Number:	×	
Date Of Birth(mm/dd/yyy):	×	
Address 1	Address1 🐱	
Address 2:	Address2	
City	City 💉	
State:	State 💌	
Zip/Postal Code:	Zip 💌	
Country:	Country 💉	
Help-Custom 1:	~	
Custom 2:		
Launch URL/EXE (with pa	rameters)	
		7 Min Number Length Records Processed: Vice Check/remove duplicate num
Agent Group: Default	i List	Records Rejected:
Campaign: Default	~	
Prefix	Help	
Ignore First	Record	
[mport	Close	C

Configuring Call Navigation (Call Flow)

Call navigation can be combined to run many different types of call actions, before running a custom set of call actions, please test them using your mobile/test phone, to make sure the action set works correctly and there are no error's.

Call navigation for	just playin	g a message	when the	call is con	nected.
	J	9			

ld		Action/Keyword	Navi	ation		3	Value						Enab
17		Play Message	Play	Prompt	t		welcome.	vav					0
31		End Call	End	all									1
- To se	lect an	action to update or delete, dou	use click in the	grey ard	ea next to the	action you	want to edit	r delete. Then edit	the fields	below and c	lick update if you	u want to update t	the action
- To se click dek Machine	lect an	action to update or delete, dou elete the action. To add an acti	ble click in the on, simply fill it	grey are the fiel Dialer fiel	ea next to the dds below and o delay discou	action you click add. [want to edit	r delete. Then edit	the fields g in, if you machine	below and c are using B By simply as	lick update if you ind Transfer. N	u want to update t ote: When using	the action
– To se click dele Machine n updati	lect an ste to c Det' yr	action to update or delete, dou elete the action. To add an acti u can specify if you would like MachineDet.	ble click in the on, simply fill the Predictive	grey are the fiel	ea next to the ds below and o delay discor	action you click add. [necting the	want to edit Do not forget call when it	r delete. Then edit o add our 3CX plug inds an answering	the fields g in, if you g machine	below and c are using B By simply ac	lick update if you lind Transfer'. Ni dding a delay in r	u want to update t ote: When using milliseconds in the	the action
— To se click dele Machine n updati	lect an ete to o Det 'yn ng 'An	action to update or delete, dou elete the action. To add an acti u can specify if you would like MachineDet'.	tole click in the on, simply fill the Predictive	grey are the fiel Dialer to	ea next to the ids below and o delay discor	action you click add. I inecting the	want to edit Do not forget c call when it	r delete. Then edit o add our 3CX plug inds an answering	the fields g in, if you a machine	below and c are using B By simply au	lick update if you lind Transfer'. Ni Idding e delay in r	u want to update ote: When using milliseconds in the	the action

Call navigation for checking for an answering machine/faxmachine first and then transferring a connected call to 3cx. In this example it shows you can disable call actions. So make sure your "AnsMachineDet" is enabled if you want to check for answering/fax machines first before transferring to 3CX.

		Predictive Dialempian	er - Ver	sion 1.4.7							
	Settings	Updates Purchase Hel	p								
tisti	cs Call	Lists Call Records/Repo	rts Do	Not Call List	Navigation	Phones/Queue	s Agent Groups(Teams)	Time Zones	Campaigns	View Agents	Configu
	i.			2							
	Id	Action/Keyword		Navigation		Value					Enab
	17	Human Voice Detect		AnsMachin	eDet						0
	30	Transfer 3CX Queue		Blind Trans	fer(3CX)						1
	31	End Call		End Call							1
-				6							
	To select a	an action to update or delete, d	ouble clic	k in the grev ar	eg next to the	action you want to	edit or delete. Then edit the file	ds below and clic	sk update if vou	u want to update t	he acti
	To select a	in action to update or delete, d	ouble clici	k in the grey ar	ea next to the	action you want to	edit or delete. Then edit the file	ds below and clic	sk update if you	i want to update t	he actic
	To select a	an action to update or delete, d	ouble clict	k in the grey ar	ea next to the	action you want to	edit or delete. Then edit the file	ds below and clic	sk update if you	want to update t	he actic
lic	To select a	n action to update or delete, d delete the action. To add an a	ouble clici	k in the grey ar	ea next to the	action you want to click add, Do not fr	edit or delete. Then edit the fie rget to add our 3CX plug in, fi	ds below and clic	sk update if you nd Transfer'. No	i want to update t	he actio
lic	To select a k delete to	in action to update or delete, d delete the action. To add an you can specify if you would	ouble clici ction, sim	k in the grey ar ply fill in the file addretue Dialer t	ea next to the a Ids below and	action you want to click add. Do not fr	adīt or deleta. Then edīt the file rīget to add our 3CX pilug iņ, if - nī finds an answering mach	ds below and clic you are using 'Blic e. Bv simoly ado	ck update if you id Transfer', ho iling a delay i	I want to update t te: When using Miliseconds in the	he actio
	To select a k delete to chineDet'	an action to update or delete, d e delete the action. To add an a you can specify if you would i	ouble clici ction, sim	k in the grey ar ply fill in the file cdictive Dialer t	ea next to the Ids below and o delay discon	action you want to click add. Do not fr necting the call wh	edit or delete. Then edit the file rget to edd our 3CX plug in, if 1 an it finds an answering machu	ds below and cli ou are using 'Bir ne. By simply adc	sk update if you d Transfer'. No ling a delay in n	i want to update t ste: When using nilliseconds in the	he actio
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	To select a k delete to chineDet' updating 'A	in action to update or delete, d delete the action. To add an a you can specify if you would li insMachineDet'.	ouble clic iction, sim ike the Pre	k in the grey ar ply fill in the fie edictive Dialer t	ea next to the t Ids below and o delay discon	action you want to click add. Do not fr necting the call wh	edit or delete. Then edit the file rget to add our 3CX plug in, if en it finds an answering mach	ds below and clic you are using 'Blir ne. By simply add	ck update if you di Transfer'. No iling a delay in n	i want to update t zte: When using nilliseconds in the	he actio value fi
	To select a k delete to chineDet' ipdating 'A	in action to update or delete, d i delete the action. To add an a you can specify if you would i insMachineDet'.	ouble clici ction, sim ike the Pre	k in the grey ar ply fil in the fre edictive Dialer t	ea next to the Ids below and o delay discon	action you want to click add. Do not fo necting the call wh	adit or delete. Then edit the file rget to add our 3CX plug in, if r nit finds an answering mach	ds below and cli ou are using 'Bir ne. By simply ado	sk update if you nd Transfer'. No iling a delay in n	i want to update t ste: When using illiliseconds in the	he action
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	To select a k delete to chineDet apdating 'A	in action to update or delete, d delete the action. To add an a you can specify if you would li insMachineDet'.	ouble clici iction, sim ike the Pre	k in the grey ar ply fill in the fie adictive Dialer t	ea next to the Ids below and o delay discon	action you want to click add. Do not fo necting the call wh	adit or delete. Then edit the file rget to add our 3CX plug in, if en it finds an answering mach	ds below and clic you are using 'Blir ne. By simply add	ck update if you nd Transfer'. No Jing a delay in n	i want to update t ste: When using milliseconds in the	he action value fi
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	To select a k delete to chineDet' apdating 'A rd ID:	in action to update or delete, d delete the action. To add an a you can specify if you would li insMachineDet'. Action/Keyword	ouble cilcl iction, sim ike the Pro	k in the grey ar ply fill in the file cdictive Dialer t	es next to the i ids below and o delay discon Actic	action you want to click add. Do not tr necting the call wh m:	edit or delete. Then edit the file rget to add our 3CX plug in, if r an it finds an answering mach	ds below and clic you are using 'Bir ne. By simply add	sk update if you nd Transfer'. No ling a delay in n	r want to update t the: When using milliseconds in the Enal	he action value fi ble:
- ic la	To select a k delete to chineDet apdating 'A rd ID:	an action to update or delete, d eletet the action. To add an a you can specify if you would I insMachineDet. Action/Keyword	ouble clici iction, sim ike the Pre	k in the grey ar ply fil in the fie adictive Dialer t	ea next to the Ids below and o delay discon Actic Add	action you want to click add. Do not fo necting the call wh on: Update	edit or delete. Then edit the file rget to add our 3CX plug in, if r en it finds an answering mach Valu	ds below and clic you are using 'Blir ne. By simply add e:	sk update if you nd Transfer'. No Jing a delay in n	i want to update t de: When using milliseconds in the Enal	he acti value ble:

Call navigation for checking for an answering machine and leaving a message if one is detected after the call is connected.

	angs Upd	lates Purchase Help	sion 1.4.7						
atistics	Call Lists	s Call Records/Reports Do	Not Call List Navigation	Phones/Queues	Agent Groups(Teams)	Time Zones	Campaigns	View Agents	Configure
ld	I A	Action/Keyword	Navigation	Value					Enable
17	7 D	etect Fax Leave Message	AnsMachineDetMessag	je welcon	ne.wav				0
31	I E	nd Call	End Call						1
*									
lp — Tos t click de IsMachin 1en upda	elect an act slete to delet reDet' you c iting 'AnsMa	ion to update or delete, double clic ie the action. To add an action, sim an specify if you would like the Pr ichineDet	s in the grey area next to the ply fill in the fields below and solctive Dialer to delay discon	action you want to click add, Do not for necting the call whe	ndit or delete. Then edit the fir get to add our 3CX plug in, if n it finds an answering mach	elds below and cli you are using 'Bli inie. By simply ad	ck update if you nd Transfer', No ding a delay in n	want to update t ite: When using illiseconds in the	he action, c value field
lp – To s t click de 1sMachir 1en upde iecord I	elect an act slete to delet neDet' you c rting 'AnsMa D: 17	ion to update or delete, douible clic te the action. To add an action, sim an specify if you would like the Pr schineDet. Action/ Keyword: Deter	c in the grey area next to the ply fill in the fields below and adictive Dialer to delay discon t Fax Leave Mes Actio	action you want to e click add. Do not for inecting the call whe m: AnsMachinet	ndit or delete. Then edit the fir get to add our 3CX plug in, if n it finds an answering mach DetMessage Vah	elds below and cil you are using 'Bli ine. By simply ad ne: welcome.v	ck update if you nd Transfer'. Nc ding a delay in n wav	want to update t te: When using nilliseconds in the Enal	he action, c value field ble: 0

Loading the Predictive Dialer/Increasing Call Rates (Try Predictive Dialing Algorithms first on the "Configuration" tab, before changing the loading values.)

In the Predictive Dialer configuration file, in the application directory (C:\MDLsolutions\MDLsolutions Dialer - Predictive Dialer\Dialer.exe.config) you will find one setting that is not included in the standard configuration interface. It is called PredictiveDialerLoad (<add key="PredictiveDialerLoad" value="0" />), as seen below.

By default, the Predictive Dialer is setup to make sure there is an agent available for every call, and no calls are left in the 3CX queue. But some call lists have a lot of numbers that are either invalid, fax machines, answering machines or people who do not accept call center calls. In this case you may need to place a lot of calls at once in order to get one or two calls a minute per agent. If this is the case you can simply increase the "PredictiveDialerLoad" value until this call rate is reached. With this said, you may get from time to time a called client waiting in the 3CX queue. So please make sure you have a message playing for the 3CX queue that explain why this person was called and to please hold on for the next available agent.

Finally the "PredictiveDialerLoad" cannot be higher than the total amount of channels your Predictive Dialer is licensed for.

Text to Speech (TTS) settings

If you want to change the sound of the TTS voice or the speed at which it speaks, then you can adjust the TTSVoice setting and the TTSRate setting. Current voices that are available (check your OS for availability) are Microsoft Mary/Mike/Sam. Please look online for other Microsoft voices, if need be.

```
AppSettings>

<add key="SQLConnectionString" value="server=192.168.2.96\SQLEXPRESS;Initial Catal(

<add key="SQLConnectionStringAISRecords" value="server=192.168.2.96\SQLEXPRESS;Initial Catal(

<add key="LocalIP" value="localhost" />

<add key="LocalIP" value="localhost" />

<add key="EmailServer" value="localhost" />

<add key="ToEmailAddress" value="mail.localhost" />

<add key="ToEmailAddress1" value="admin@localhost" />

<add key="ToEmailAddress2" value="info@localhost" /
```

Bridge Mode

Bridge Mode is used to place calls directly with your VoIP Provider/Gateway. If you are using our Predictive Dialer/Call Center Solution version, you will still be able to transfer calls to a 3CX queue using Bridge Mode. Bridge Mode is also required for call centers with a CPM of more than 50. It is always a good idea to verify that your VoIP provider is setup to handle high CPM's in order to support your call center. Or you can use our call center certified VoIP Provider.

Step 1 is to add your external IP Address and your VoIP provider/VoIP gateway information to the Bridge Mode tab.

Phone	System Re	gistration (Dialing TI	hrough Phone Sy	stem) Bridge Mod	le (Direct To VolP Pro	wider)	'Please stop the d	lialer when changin	ng this information	
	ID	VolP Provider - IP/Domain Name		Account	Password	Phone Syste	em VP Account	Agent Group	Prefix	
۲.	2	4.59.189.225		6572359901	1	714929101	8	Default	1	
		o mono						s: 67.219.100.120		
		ID	Call Start	Time		Call End	Time		1	
		· •	1:05 AM			11:59 PW			2	

See "Configuration/Bridge Mode" under the Dialer/Predictive Dialer section for further details on this tab.

	and the local division of		rsion 3.3.3 (Production Release)		
8	Start/Stop	Call Lists Multi Client	lpdates Help		
tist	tics Call	Lists Call Records/Reports	B Do Not Call List Navigation Ph	iones/Queues Agent Groups(Teams) Time Zones Camp	oaigns View Agents Configu
_	1000				
_	ld	Action/Keyword	Navigation	Value	Enat
	1	Qualify Call	AnsMachineDet		0
	3	Transfer To Agent	Bridge Transfer(3CX)		1
	4	Bye	End Call		1
				nor und to side scients. They side the finds below and slick unde	
cli	- To select s	n action to update or delete, dou delete the action. To add an act	ble click in the grey area next to the action on, simply fill in the fields below and click	n you want to edit or delete. Then edit the fields below and click upda add. Do not forget to add our 3CX plug in, if you are using "Bind Tran	te if you want to update the action, ster . Note: When using
o	- To select s lick delete t tschineDef	n action to update or delete, dou delete the action. To add an acti you can specify if you would like	ble click in the grey area next to the action or, simply fill in the fields below and click the Predictive Dialer to delay disconnecti	n you want to edit or delete. Then edit the fields below and click upda sid. Do not forget to add our 3CX plug in, if you are using "Bind Tran ing the call when it finds an answering machine. By simply adding a d	te if you want to update the action, afer'. Note: When using elay in miliseconds in the value fiel
	- To select a lick delete t tschineDef updating 'A	in action to update or delete, dou delete the action. To add an acti you can specify if you would like nsMachineDet".	ble click in the grey area next to the action on, simply fill in the fields below and click the Predictive Dialer to delay disconnecti	n you want to edit or delete. Then edit the fields below and click upda add. Do not forget to add our 3CX plug in, if you are using "Blind Tran ing the call when it finds an anevering machine. By simply adding a d	te if you want to update the action ster". Note: When using elay in milliseconds in the value he
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cli in in	- To select a lick delete to lick himsbor updating "A and ID: 3	n action to update or delete, dou delete the action. To add an acti you can specify if you would like nsMachineDet". Action/Keyword:	ble click in the grey area next to the action on, simply fill in the field's below and click the Predictive Dialer to delay disconnect ansfer To Agent Action(Call Fi	n you want to edit or delete. Then edit the fields below and click upda add. Do not forget to add our 3CX plug in, it you are using 'Bind Tran ing the call when it finds an anewering machine. By simply adding a d low): Bridge Transfer(3CX)	te if you want to update the actic ster'. Note: When using elay in millseconds in the value T Enable: 1

Step 2 is to setup the actions/call flow for the Bride Mode calls.

See "Navigation (Call Flow)" under the Dialer/Predictive Dialer section for further details on this tab.

10 N. 1944	actoris "Predictive Dialer	/Diater - Version 3.5.3 (Production Release)		
tistic:	s Call Lists Call Reco	rds/Reports Do Not Ca) Il List Navigation Pho	nes/Queues Agent Groups(Tear	ns) Time Zones Campaigns View Agents Configu
1	I I			1	
	ID Name		Extension/Queue	Group Name	Extensions in Queue
Help - 1 - Yo numbe ! - You ! - You the ex	-There are two options whi w can simply use VoIP prot can also use SXLP Point - To select an extension to u tension, or just click delete t Name:	en creating your transfer is chones/phones that except ne, and '192.168.2.100° is 1 Click on the FAQ button at it pulate or delete, double click to delete the extension. To a Extension	calls directly from the daler, he IP address of the actual v e locition left of the page to a in the grey area next to the dd en extension, simply fill in the grey actual states of the second the second states of the second states of the second states of the second states of the second states of the second states of the second states of the second states of the second states of the second states of the second states of the second states of the second states of the second states of the	by setting the extension up this way ¹⁴ foll phone. In this scenario features lik extension you want to exit or delete. T the fields below and click add. D Name:	100(2)192.165.2.100"(example). "100" is the actual e conference and transfer are not supported. later for 3CX IP FBX. hen edt the fields below and click update if you want to update Extensions in Queue (Example: 101,102,103,104)
Help – 1 - Yo numbe 2 - You Help – the ex	- There are two options wh w can simply use VolP soft er/extension of the VoIP pho u can also use 3CX (P PeX. - To select an extension to u tension, or just click delete t Name:	en creating your transfer is chones/phones that except ne, and '192.168.2.100° is 1 Click on the FAQ button at its pulste or delete, double click to delete the extension. To a Extension	calls directly from the daler, he IP address of the actual v e lottom left of the page to a in the grey area next to the ad an extension, simply fill in the grey and the set Grou Defa	by setting the extension up this way ¹⁴ fold phone. In this scenario features lik extension you want to exit or deter. T the fields below and click add. D Name: uit	100(2)192.168.2.100*(example), "100* is the actual e conference and transfer are not supported, later for 3CX P PBX, hen edit the fields below and click update if you want to update Extensions in Queue (Example: 101,102,103,104)

Step 3 is to setup the 3CX queue for the Bride Mode calls.

See "Phones/3CX Queues" under the Dialer/Predictive Dialer section for further details on this tab.

Step 4 is to setup a VoIP Provider in 3CX to receive the transferred calls from the Predictive Dialer when using Bride Mode.

Provider De	tails	of using even ideals CTD Constant					
Enter the i	nostname and port	or your provider's SIP Server.		192.168.0.10			
SIP server	hostname or IP		192.168.0.10			0	
SIP server	port			5060		0	
Outbound	proxy hostname o	r IP		192.168.0.10		2	
Outbound	proxy port (defaul	t is 5060)		5060		0	
Authentica Authentica 3 Way Aut	ation ID ation Password chentication ID			17149291018		2 2 2 2 2	
Simultaneou	us Calls			10	100		
Maximum S	5imultaneous Calls			100		0	

Enter the IP Address of the Predictive Dialer server. Then enter the same number you used in the "Phone System VP Account" under the Bride Mode settings, in the "Authentication ID" field and "Port Identification" field. Set Max Calls to the amount of licensed Predictive Dialer channels.

Ster	o 5 set the	"PBX	Delivers	Audio"	and	"Requires	registration	for"	settinas.
0.01	0 0 0 0 0 0 0 0 0 0	1 0/1	0	,	0.110	1.094.00	regionation		ootanigoi

Edic VOIP (Provider settings and	d click OK or Apply to save chan	ges			
General	Advanced	Outbound Parameters	Inbound Parameters	Source ID	DID	
Provider Ca	apabilities					
Configure	Advanced options					
Supports I	Re-Invite					
Supports '	'Replace'					
PBX Delive	ers Audio	20				
Switch on	Secure RTP (SRTP)					
Disable Vio	deo					
Registration	n Settings					
Configure	Advanced options					
Time betw	een registration atte	empts (in seconds)	60	0		
Require re	gistration for:		Do not requi	re	- 0	
Which IP t	o use in 'Contact' fie	ld for registration:	External(S	5TUN resolved)		0
			O Internal	18		0
				IP		0
ų.				1946 - J		
Codec prior	ities					
Specify wh	nich codecs to use ar	nd their priority				
Available	Codecs		Assigned Codecs			
Speex			G.711 U-law			
iLBC		Add >	G.711 A-law		Up	
G729		< Remove	GSM-FR		Down	
G722					<u>, , , , , , , , , , , , , , , , , , , </u>	
, Ali		<u></u>		- 6		

Set the "PBX Delivers Audio" to checked and "Requires registration for" setting to "Do not require".

Step 6 is to setup the 3CX queue that will be used by this VoIP Provider, for the Bridged transferred calls.

Edit VOIP Provider		
Edit Port :17149291018		
/oip Provider port no 17149291018 on MDLsolutionsTwo -		
Virtual Extension Number (Unique)	10003	
Authentication ID	17149291018	
Authentication Password	***	
3 Way Authentication ID		
Port identification	17149291018	
Office Hours Configure where calls should be routed during office hou Configure Call	ırs.	
Connect to Extension	100 agent one 👻	C
Connect to Queue / Ring Group	873 3CX Queue 🗸 🗸	0
Connect to Digital Receptionist	· · · · · · · · · · · · · · · · · · ·	C
🔘 Voicemail box for Extension	100 agent one 🗸 🗸	0
Forward to Outside Number		C
🔘 Send fax to	email of extension 888 🔹 👻	0
🕅 Set, up Specific Office Hours	Set up Specific Office Hours	
🕅 Include holidays	0	
${ar l}$ Apply the same routing logic Outside of office hours		
Other Options		
Set other general options for this specific port		
Outbound Caller ID	Ø	
Allow outbound calls on this line		
Allow incoming calls on this line		
Maximum simultaneous calls	100	
Play Holiday Prompt on Public Holiday		

Select the 3CX queue you created earlier in the dialer interface/tab. That's it, you are done.

Dialer/Predictive Dialer Configuration File

Detailed explanation of the dialer/predictive dialer configuration settings. This configuration file can be found in the following directory: C:\MDLsolutions\MDLsolutions Dialer - Predictive Dialer\ Dialer.exe.config

<add key="SQLConnectionString" value="Server=localhost\SQLEXPRESS;Initial Catalog=MDLsolutionsDialer;User ID=sa;Password=mediagw1234!;" />

Details: The SQL connection string used to connect the dialer to the local/dialers SQL database. Default is 'localhost'.

<add key="SQLConnectionStringAISRecords" value="Server=localhost\SQLEXPRESS;Initial Catalog=MDLsolutionsDialer;User ID=sa;Password=mediagw1234!;" /> Details: Reserved. Default is 'localhost'.

<add key="LocalIP" value="localhost" /> Details: The IP address of the originating SIP traffic. Default 'localhost'.

<add key="3CXController" value="192.168.2.80" /> Details: The IP address of the originating SIP traffic. Default 'localhost'.

<add key="EmailServer" value="EmailServer" /> Details: The email server (SMTP) IP Address or Domain name you want the dialer notification emails sent to.

<add key="FromEmailAddress" value="info@mdlsolutions.com" /> Details: The from email address that you want the notification emails to originate from.

<add key="ToEmailAddress1" value="support@mdlsolutions.com" /> Details: The destination email address that you want the notifications emails sent to.

<add key="ToEmailAddress2" value="info@localhost" /> Details: The second/backup destination email address that you want the notifications emails sent to.

<add key="Username" value="support@mdlsolutions.com" /> Details: The email server (SMTP) account username, for the originating email address.

<add key="Password" value="seiko1" /> Details: The email server (SMTP) account password, for the originating email address.

<add key="TotalChannels" value="2" /> Details: The total amount of channels you want the dialer/predictive dialer to use at anytime. Cannot exceed the maximum amount of licensed channels.

<add key="FailedCallRecognitionNotificationCounter" value="3" /> Details: Reserved.

```
<add key="TransferedToAnAttendantCounter" value="4" /> Details: Reserved.
```

```
<add key="MultiNavDelay" value="3" /> Details: Reserved.
```

<add key="DebugMode" value="0" /> Details: Used to provide additional dialer/log file details to resolve complex issues.

<add key="CallRecording" value="1" /> Details: Set value to 1 to enable call recording. Supported in Bridge Mode only. Default: 0, off.

<add key="ASRSampleSizeInSeconds" value="11" /> Details: Reserved.

<add key="InterEnquiryDelayMax" value="1" /> Details: Reserved.

<add key="ASRModeOn" value="0" /> Details: Reserved.

<add key="ManagedAgentCalls" value="false" /> Details: Used for running dialer calls, see FAQ's.

<add key="DialerModeOnly" value="false" /> Details: Used for running dialer calls, see FAQ's.

<add key="PredictiveDialerLoad" value="0" /> Details: Used to fine tune the predictive dialer call rate. Higher value increase the call rate, but decreases the accuracy and visa versa. Use increments of 1 to test. Default 0.

<add key="TTSVoice" value="Name=Microsoft Mary" /> Details: The Microsoft Text To Speech voice used by the dialer/predictive dialer. If your Windows OS has other Microsoft Text To Speech voices loaded, you can use them as well. Default: Name=Microsoft Mary.

<add key="TTSRate" value="2" />

Details: The Microsoft Text To Speech voice rate at which the text is played back at. Default: 2.

<add key="PDAlgCallIntervalStartDelay" value="15" /> Details: A short delay given before the predictive dialer starts dialing. Default: 15 seconds.

<add key="DeleteCallRecordsAfterInDays" value="7" /> Details: Deletes call records after a certain amount of days. Default: 7 days.

<add key="InterCallDelay" value="1" /> Details: Reserved.

<add key="AgreedToTerms" value="0" />

Details: If set to 1, states the user of this software agrees to all the terms of use, and no longer displays the user agreement message when the dialer/predictive dialer starts up. Default: 0.

<add key="EnableDST" value="1" />

Details: Enables day light savings time. Default: 1, enabled.

<add key="NoMoreRecordsFoundTimeZoneDelayRetry" value="10" /> Details: The multiple time zone call record check delay. Default: 10 seconds.

<add key="TimeZonePrefixMatchLength" value="3" />

Details: Used to identify the time zone, by using the telephone number prefix. Default: 3 digits.

<add key="AdditionalPrefix" value="1" />

Details: When using Bridge Mode, you can add a prefix to the numbers in your call lists when dialed.

Default: 1.

<add key="PCMCodec" value="PCMU" />

Details: Select between PCMU law and PCMA law call media setting. Default: PCMU.

<add key="TimeZoneMargin" value="2" />

Details: The buffer between the time the last call can be dialed in a certain time zone. Example: Time Zone -8, Start Time 9am, End Time 6pm. Last call will be called at 5:58pm.

Default: 2 minutes.

Agent Interface Dialer Configuration File

Detailed explanation of the agent interface configuration settings. This configuration file can be found in the following directory: C:\Program Files\MDLsolutions, Inc\MDLsolutions - Agent Disposition Interface\AgentDispositionInterface.exe.config

<add key="SQLConnectionString"

value="rN6hZwbh7o+7n2K6GTvRyaD+1tZrgwuXHEhyuJY6y+dyzL1o8WQiS8pu6iy8Ze VkWggT75vjY41U+AEKSPL7qkqfxGay6dw6uQKtMoBbpbgNH1f25kGA+x5uCgRzk0NR VB62+mvuNnFhKC61gMFIDGSkIdhDW7kK" />

Details: The encrypted SQL connection string used for connecting the agent interface to the dialer/predictive dialer database. Can be configured using the ConfigApplication.exe application in the same folder.

<add key="Extension" value="100" /> Details: The extension used for the agent/agent interface.

<add key="3CXCRMNetworkControllerIPAddress"

value="3CX_PHONE_SYSTEM_IP_ADDRESS" /> Details: The IP Address of the 3CX server/MDL-3CX plug-in.

<add key="Interface" value="3CX" /> Details: The phone system used.

<add key="DateFormat" value="Default" /> Details: The DateFormat of the agent interface date fields.

<add key="AdminPassword" value="H05GaAnq++o=" /> Details: The administration password for the agent interface. Can be configured using the ConfigApplication.exe application in the same folder.

<add key="AgentAltQueue" value="not set" />

Details: Can be used to automatically log another 3CX extension out of a queue, while logging in the current agent/agent interface extension in.

<add key="RecordUpdateStep" value="3step" />

Details: Determines the amount of agent steps/clicks taken to update a call record in the agent interface. 3step takes more steps but allows for more control. 1step is quicker, but allows for less control.

<add key="IntegratedWebItfc" value="false" /> Details: If set to true, the agent interface will launch the web URL passed to the agent interface in a custom Agent Interface tab.

<add key="SysNoMessage" value="False" />

Details: If set to true, will prevent the "Number Does Not Exist" message from displaying.

<add key="SysAutoLaunch" value="False" />

Details: If set to true, will launch the Web URL passed to the agent interface.

<add key="SysAutoQueue" value="True" />

Details: If set to true, the agent will be automatically logged out of the 3CX queue, after receiving a call.

<add key="DialingPrefix" value="None" /> Details: Reserved.

<add key="RDFCallerID" value="None" />

Details: Removes the prefix added by 3CX from the caller id of the transferred call. Example: Caller ID = 017145551234, if RDFCallerID is set to 2, then the 01 will be removed from the Caller ID=7145551234. The Caller ID needs to match the call records in the call lists.

<add key="MapQueueToCompany" value="False" /> Details: See "Inbound Calls, Unique Call List Configuration".

<add key="EnableEncryptedFields" value="False" />

Details: Encrypts the data in the SQL dialer/predictive dialer database for agent interface custom fields 5 and 6, for sensitive information like credit card information.

Getting Started Quickly/Important Links

Getting started quickly. Downloads, documentation and videos: http://www.mdlsolutions.com/GetStartedQuickly.aspx

To get your Predictive Dialer/Dialer configured quickly, go to our online FAQ's at: <u>http://www.mdlsolutions.com/DialerFAQ.aspx</u>

Setup the Predictive Dialer to work with 3CX: http://www.mdlsolutions.com/DialThrough3CX.aspx

Setup stand alone auto dialer, play TTS/recorded messages and/or receive client responses : <u>http://www.mdlsolutions.com/DialerPlayPrompt.aspx</u>

Install 3CX plug-in: http://www.mdlsolutions.com/PlugIn.aspx

Install Agent Interface: http://www.mdlsolutions.com/AgentDisposition.aspx

Information on integrating/importing records into the MDLsolutions Dialer/Predictive Dialer. http://www.mdlsolutions.com/manuals/ImportingRecordsDialerPredictiveDialer.pdf

Viewing log files and reporting errors: http://www.mdlsolutions.com/ErrorHelp.aspx