

TxDialer v 2.0.2.3



User Manual

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Introduction

TxDialer is an automated dialer designed for call centers to make outbound calls. The dialer is set up to function in various modes namely - Preview, Progressive, Predictive, Manual and Auto.

- **Preview Dialing**

Agents can pick or preview the caller to be dialed from the contact list and click to dial to reach the customer. Agents have a predefined amount of time to gather information about the caller.

- **Progressive Dialing**

Dials the caller only when the agent is available.

- **Predictive Dialing**

Advanced dialing system that uses a dialing algorithm to dial out the customer depending on the rate at which the calls are answered and the agent availability. Connects agents to callers only when the callers answer thus freeing the agents from reaching the automated services. Agents are utilized at a highest rate if the call volume is high.

- **Auto Dialing**

Automatically starts dialing the contacts in the contact list of a campaign and plays a pre-recorded message. Useful in broadcasting or any reminder services where agents may not be required to be involved in the call.

- **Manual Dialing**

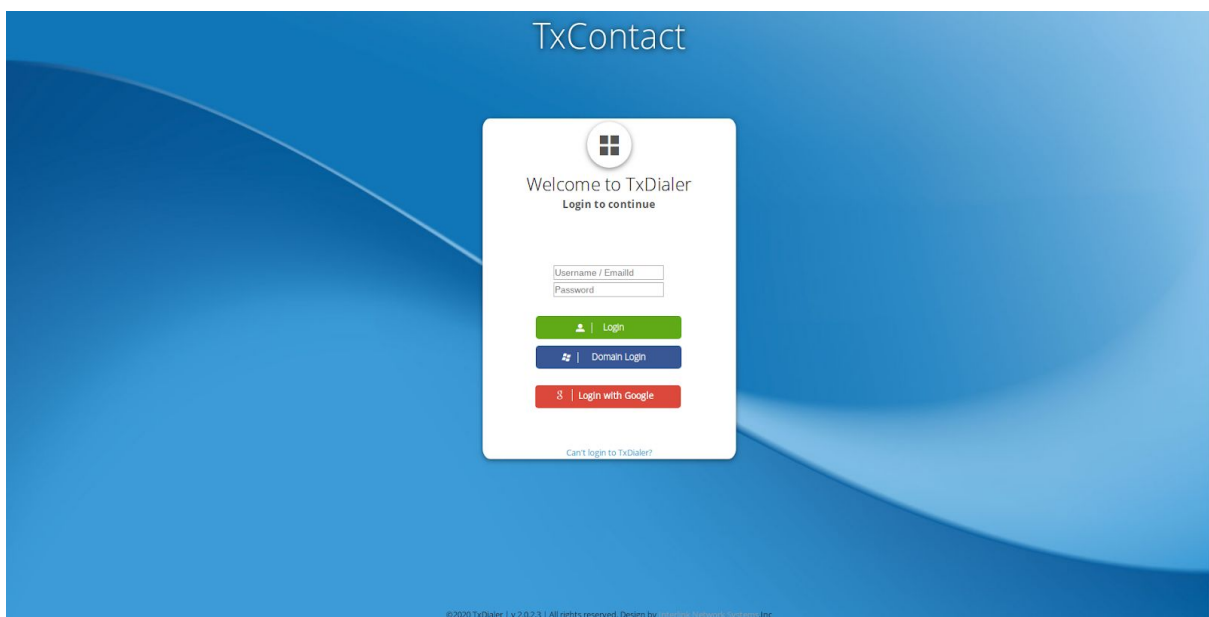
Manual Dialing mode, Agent can manually dial the contacts to be called.

Admin Interface

Admins can login to TxDialer web interface to configure and manage campaigns and do various operations on contacts.

Login Page

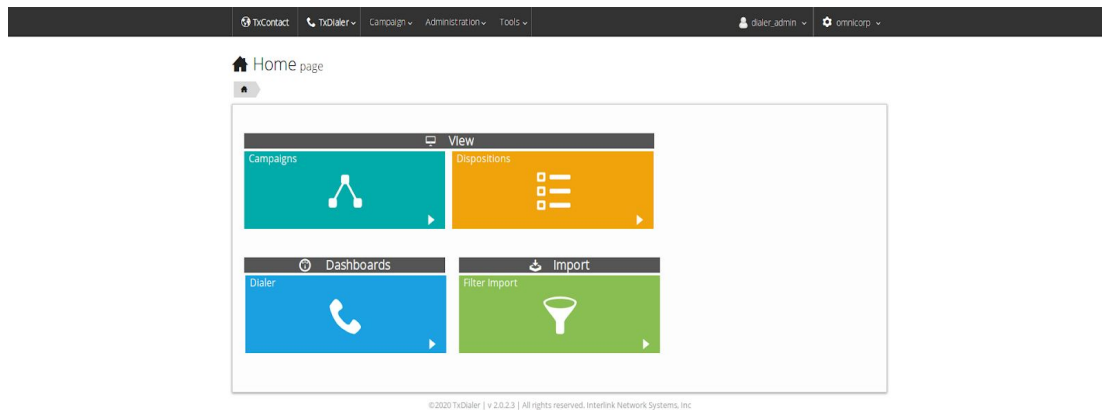
The user needs to provide login details at the Admin login page, The user can also login using google Oauth. Once logged in, the user is redirected to the Home page.



Home Page

The homepage shows a set of information that can be helpful to the user. It also provides various shortcuts to view the campaign configurations, dashboards, and various reports required.

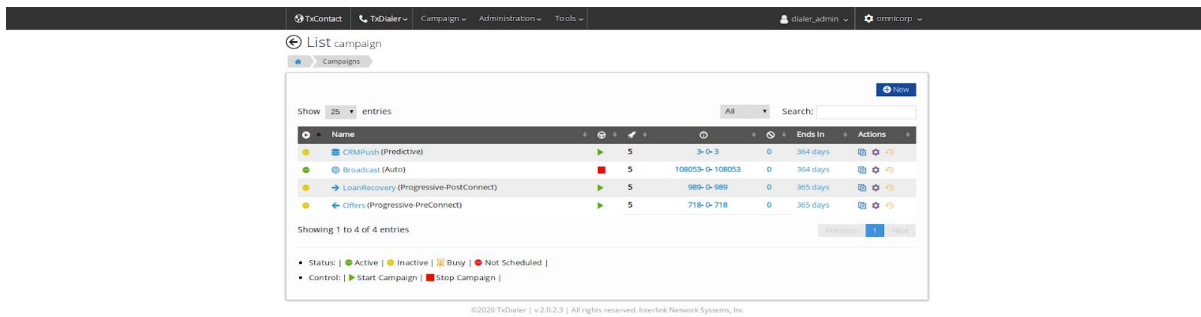
Clicking on any of the tiles below redirects the user to the respective page. The user can also make use of the navigation drop-down above



Campaigns

List Campaigns

The list campaigns page lists out all the campaigns along with their status (active or inactive), priority, total number of contacts uploaded along with number of called and not called contacts and the time until when the campaign is set to be active.



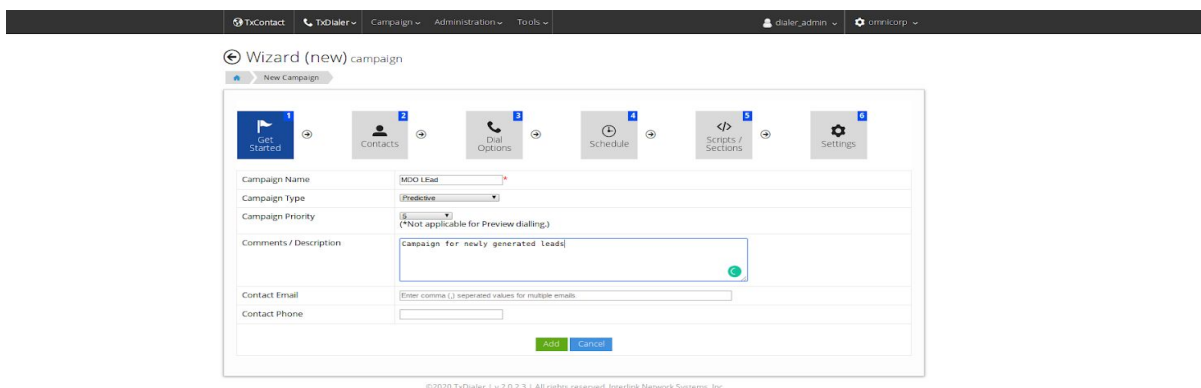
The page also provides controls to start or stop a campaign, along with actions required for each campaign (upload sounds, IVR editor, campaign report, change settings).

Add Campaign

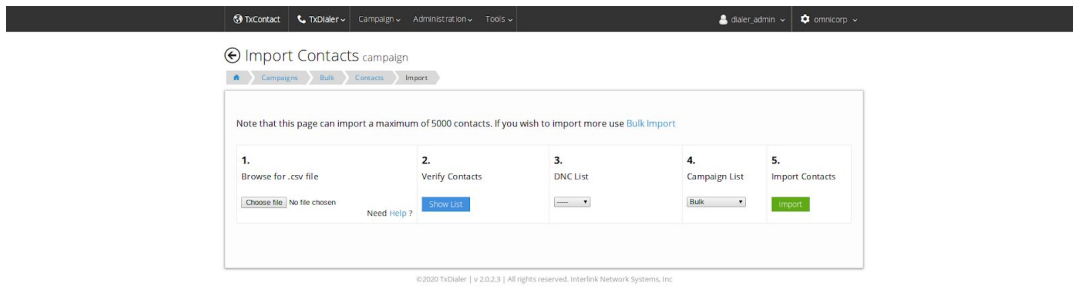
An Admin user can create a new campaign, upload contacts to the campaign, set dial options, schedule the campaign, upload scripts for agent support.

Steps to create a new campaign.

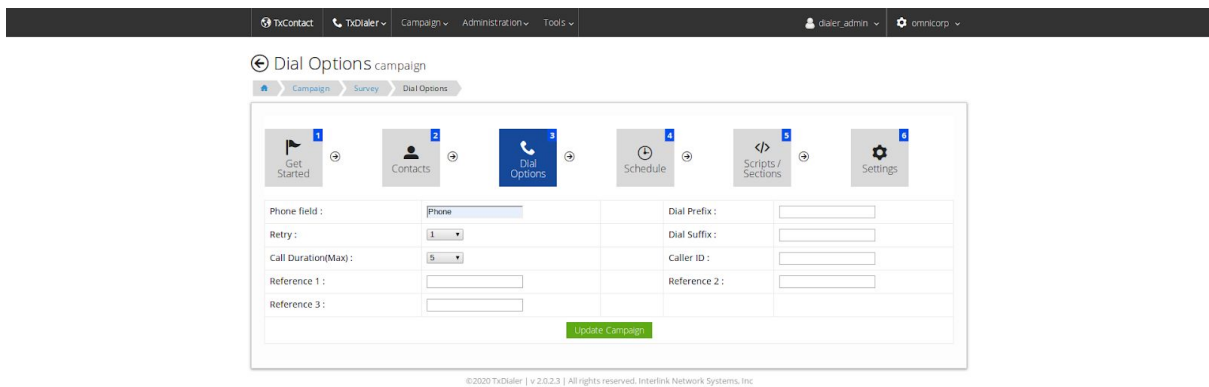
- Click on the 'New Campaign' button on the List campaign page.
- This will redirect the user to the Wizard (new) page which will ask for the basic required campaign details.
- Enter the details and click on the 'Add' button below.



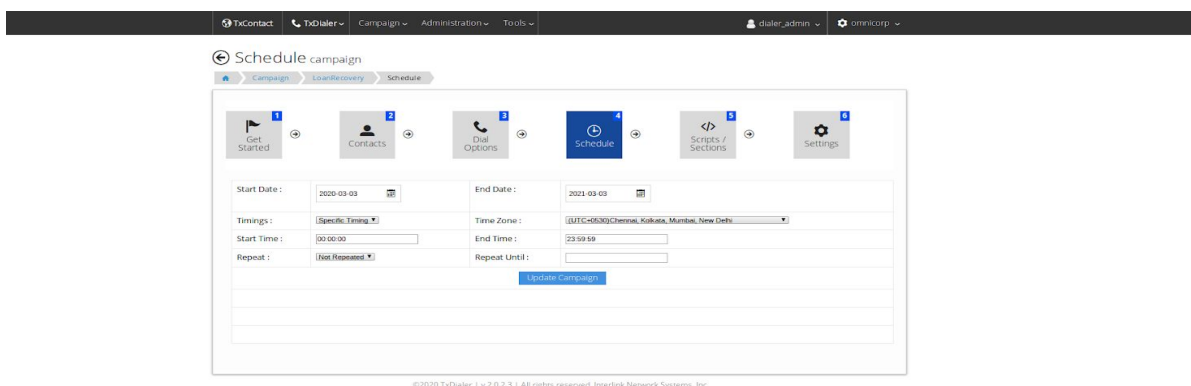
- It will redirect the user to the import contacts page, where the user can upload a CSV file. Once imported the user will be redirected to the Dial Options page.



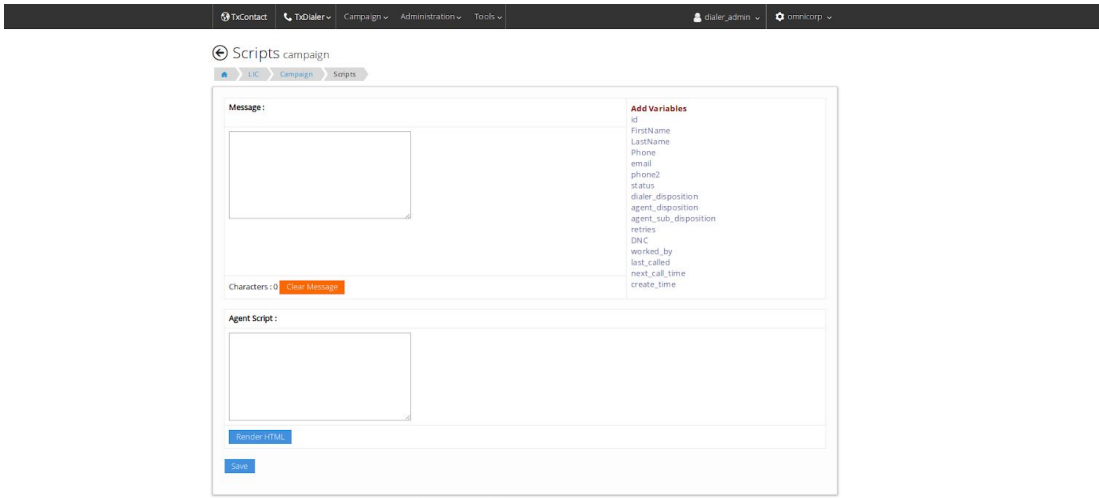
- In this page, the user can set various dialing options such as adding prefix, suffix, choosing which phone field to call, etc.



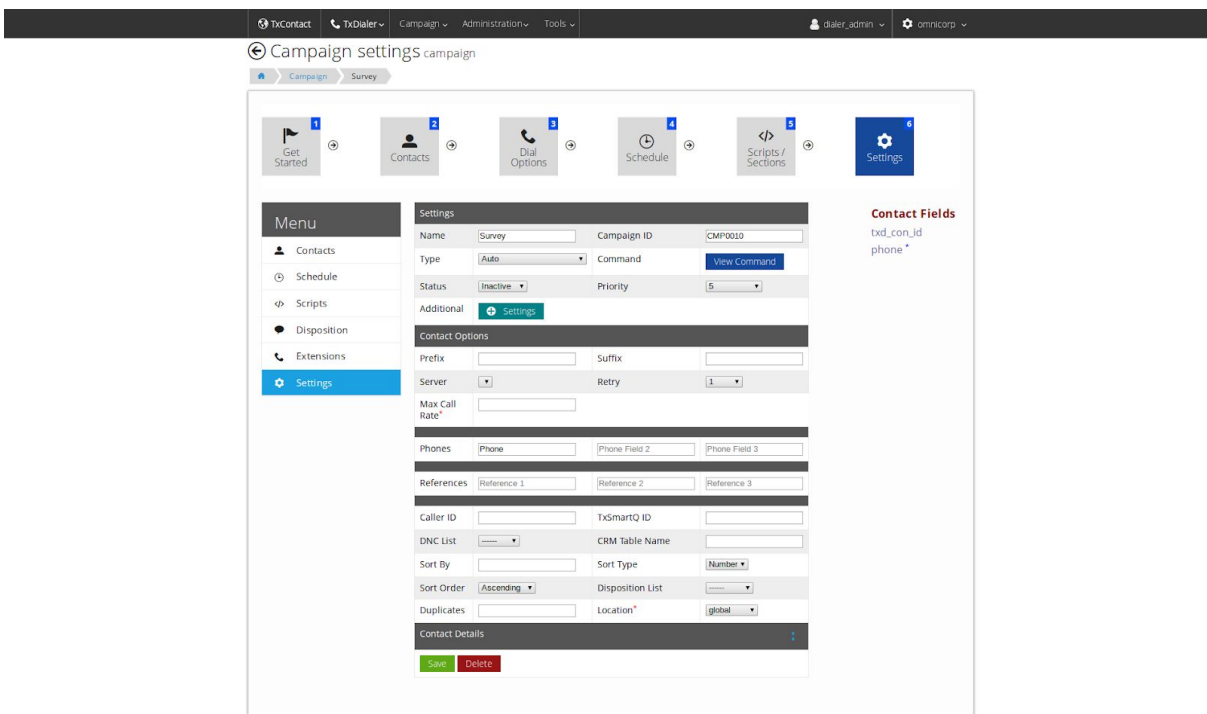
- Once Updated, the user is redirected to the schedule campaigns page where he/she can schedule campaigns for any particular time period. Once done click on 'Update'.



- This leads the user to a scripts page where he/she can type down scripts for agents support during production hours.



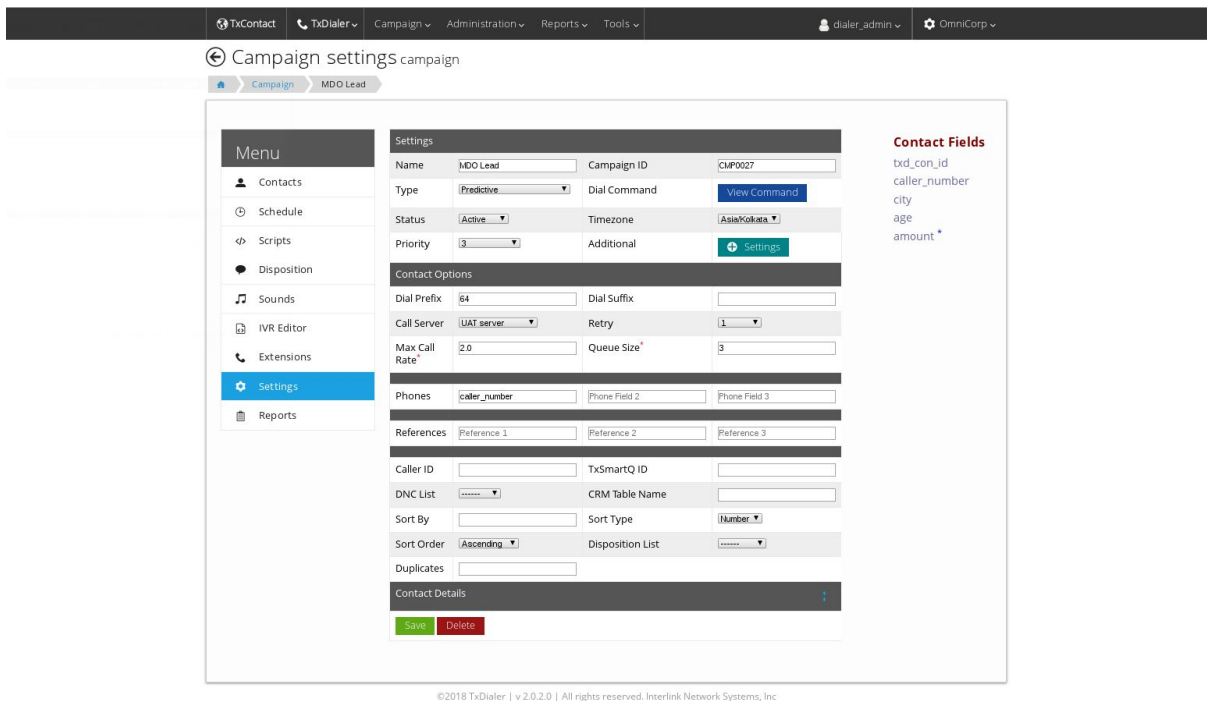
- Once it's Saved, the user is redirected to the settings page where the user can configure the campaign options and contacts.



- Click on the 'Save' button below to create a new campaign.

Campaign Settings

The Settings page lets the user edit campaign configuration values such as dial options, contact details, etc.



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- **Name** : This field is for the name of the campaign.
- **Campaign ID** : Auto generated unique campaign id shows up here.
- **Type** : The dialer is set up to function in various modes namely - Auto, Preview, Progressive, Predictive and Manual. One can select the type of the dialing mode here.
- **Status** : Indicates whether the campaign is active or inactive.
- **Timezone** : It is the timezone in which campaign schedule is set.
- **Priority** : This sets the priority for the campaigns..
- **Dial Prefix and Suffix** : It is the configuration required for making calls as required by the gateway.
- **Call Server** : The PBX(call servers) IP address that can be used to make calls or auto dialing campaigns.
- **Retry** : The number of times the contact should be dialed if the call fails when dialed first.
- **Max Call Rate** : This field is for Auto and Predictive type of campaigns,

For Auto Dialer - The configuration is to specify what is the max number of calls to handle at any given point of time.

For Predictive Dialer - The configuration is to specify what is the max number of calls to dial over a period of one minute.

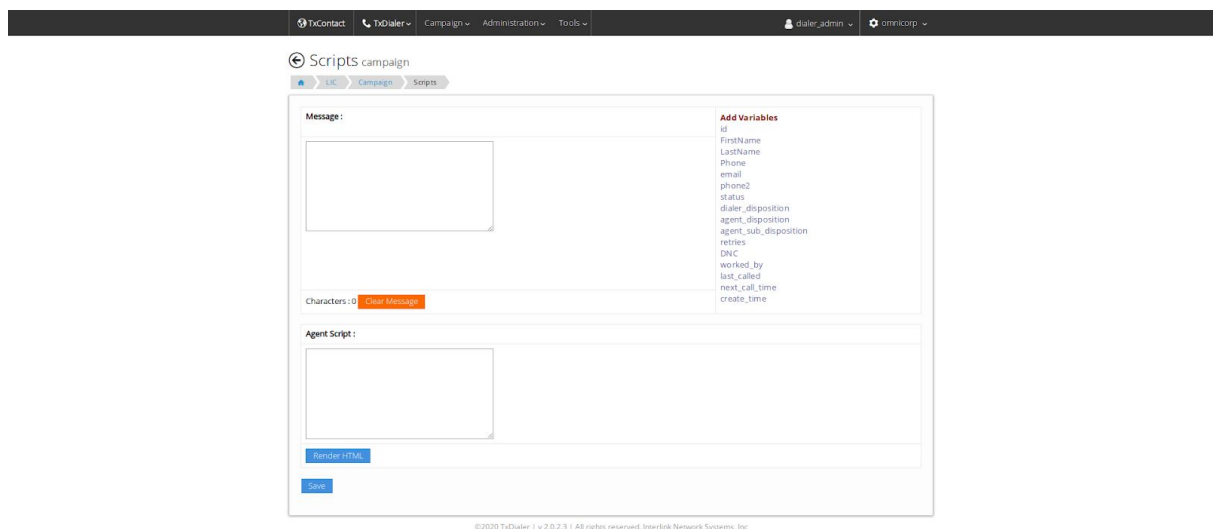
The web takes values in max calls per second. Thus, the actual max call rate would be $60 * (\text{value from the web})$

- **Progressive Pacing** : Progressive pacing is for Progressive-PostConnect, it is the configuration to control the number of contacts to dial per available agent.

- **Queue Size** : Queue size is for Predictive dialing. It is set in order to define the maximum number of calls that can be queued.
- **Phones** : The field name of the contacts that should be called, provided that field is present in contacts field.
- **References** : Additional fields that are unique in the uploaded contacts.
- **Caller ID** : The number to be displayed in the customer's phone when you make calls.
- **TxSmartQ ID** : SmartQ ID for which the campaign should be mapped.
- **DNC List** : Do Not Call Registry makes sure that it doesn't call out to phone numbers that are registered on DNC lists. The user can add multiple DNC lists to the dialer and run DNC checks on campaigns on DNC lists that are added to TxDialer.
- **CRM Table Name** : This field is used for CRM integration.
- **Sort** : Sorts the contacts in the order(ascending/ descending) and by the 'Sort by' field in which one wants to start the campaign, provided 'Sort By' fields should be one among the contact fields.
- **Disposition List** : It is the list of agent disposition that is to be considered for that particular campaign.
- **Duplicates** : This field checks duplicate entries for the fields mentioned in the uploaded contacts, only if the field exists in the 'contact fields'. It can check a single field, multiple fields or across fields.
- **Contact Details** : This field holds the details of the owner of that particular campaign, so that the owner will get updates regarding the campaign.

Scripts

The scripts page helps to provide assistance to agents on call and to set the IVR message to be played on call. This provides agents with up-to-date information while servicing prospects and clients. Administrators can define the contents of the script window from this page, and allow agents to view the most relevant information. Agent Script field is available only if the campaign type is 'Preview'.



To Enter IVR message :

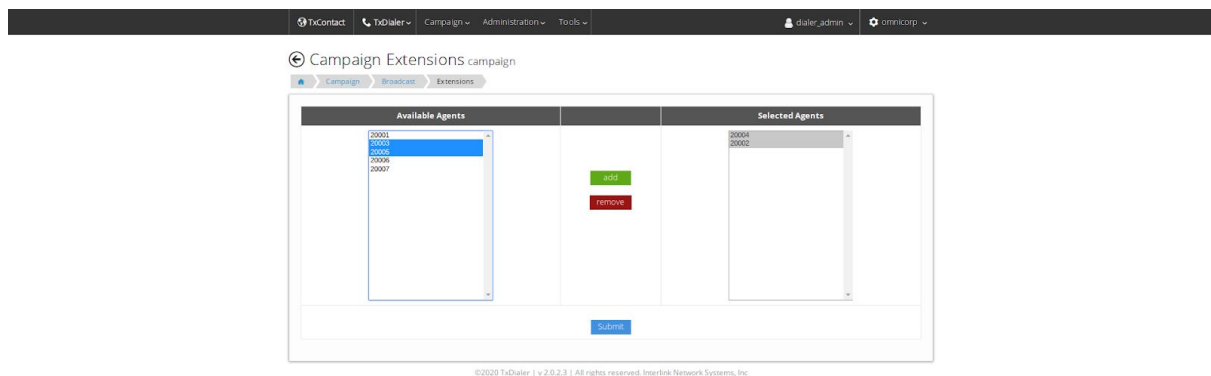
- Enter the message to be played.
- To insert variables in between the messages, click on the variables displayed on the right side of the IVR Message field.
- Click on the 'Save' button below.

To Enter an Agent Script Message :

- Enter the Agent Script message to be displayed.
- To see how the agent script will look on the agent's screen, click on '_Render As HTML'_.
- Click on the 'Save' button below.

Extensions

Each campaign needs a specific set of extensions for the agents to execute the campaign. The page allows the user to add extensions to a campaign from the available extensions.



To Add Extensions to Campaign :

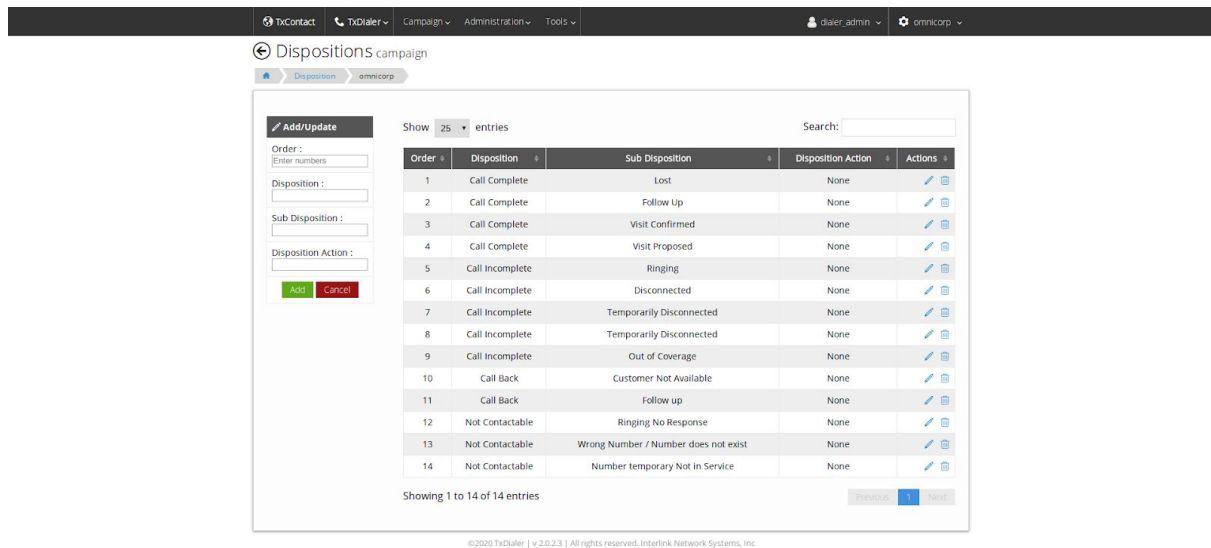
- Select extensions to be added from the Available Extensions field by clicking on the extensions. Select multiple extensions by clicking and dragging till the required extensions.
- Click on 'Add'.
- Click on the 'Update' button below.

To Remove Extensions from Campaign :

- Select extensions to be removed from the Selected Extensions field by clicking on the extensions. Select multiple extensions by clicking and dragging till the required extensions
- Click on 'Remove'.
- Click on the 'Update' button below.

Dispositions

Once an agent hangs up the call which he was attending, he needs to set the disposition for that particular call from the Agent screen. This page lists out all the dispositions created by the administrator. It also allows the administrator to add more , edit or delete current dispositions.



To Add a Disposition List:

- Enter the Disposition list name.
- Enter the Order of the Disposition.
- Add the Disposition and corresponding Sub Disposition(if required) for the Disposition list.
- Mention the action with reference to the Disposition.

To Edit a Disposition List:

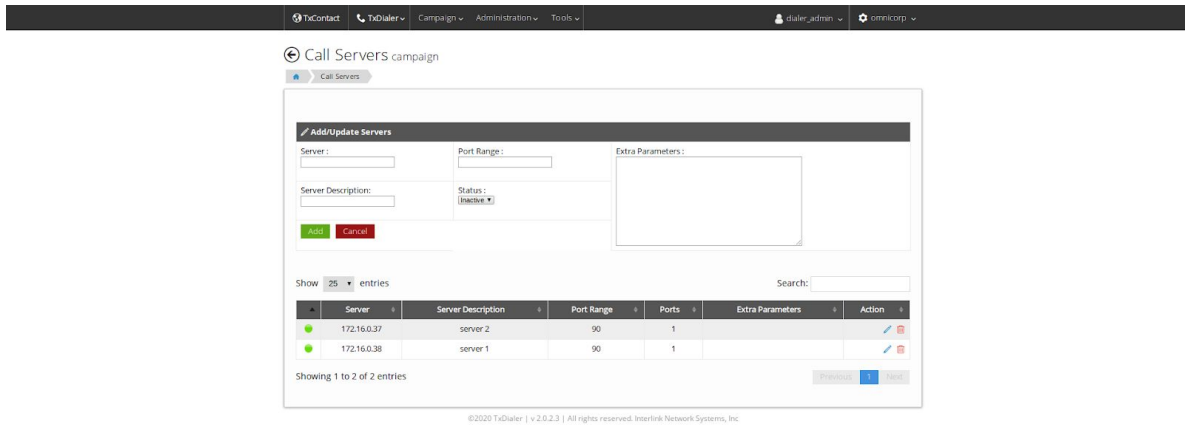
- Click on Edit Icon next to the Disposition List you want to edit.
- Dispositions under that list will get populated on the right side of the form.
- You can Add the new Dispositions for that list by entering the appropriate information and clicking on the 'Add' button.
- You can Edit the existing Dispositions by clicking on Edit Icon.
- You can Delete the Disposition from the Disposition List by clicking the Delete icon next to it.

To Delete a Disposition List:

- Click on the Delete icon next to the Disposition List.

Call Servers

The PBX(call servers) that can be used to make calls or auto dialing campaigns can be added from this page. The extra parameters like port, password and other values required for connecting to the call server can be specified in the extra parameters field.



To Add a Call Server :

- Enter the Server name.
- Enter the Port Range (extension range) that can be used on that particular server.
- Set the Status of the server.
- Enter the Extra Parameters(in JSON string) that are required to connect to the call server.

To Edit a Call Server :

- Click on Edit Icon next to the call server to be edited.
- The call server details get populated in the Add/Update server form on the left.
- Make appropriate changes to the form.
- Click on the 'Update' button below.

To Delete a Call Server

- Click on Delete Icon next to the call server to be deleted.

Dashboard

This page displays campaign details (Name, Type), Contact details (Total contacts uploaded, called contacts, contacts that are not called, contacts that are being dialed, contacts that are failed), Call details(number of calls that are going on, the total number of calls done) against all the campaigns.

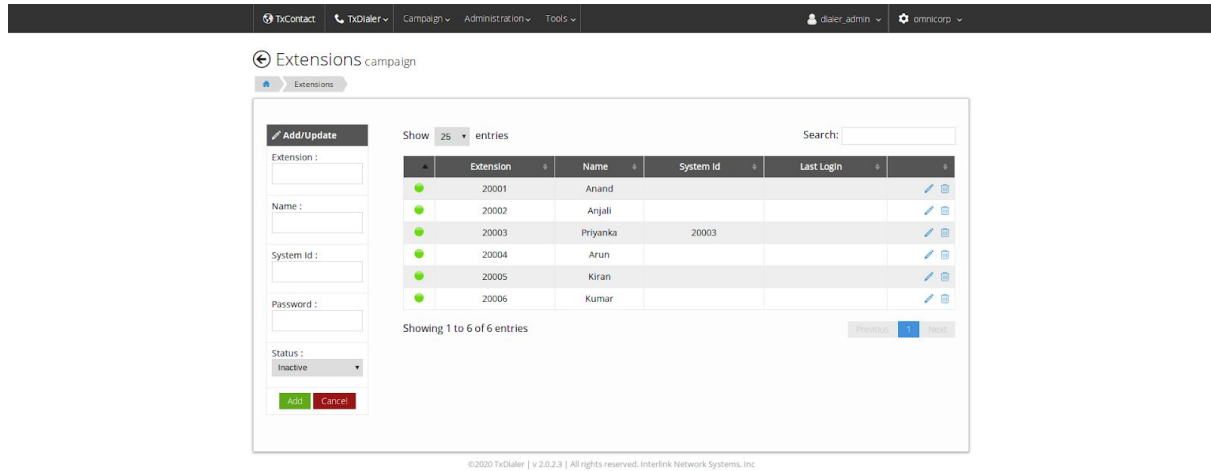
The screenshot shows the TxDialer Dashboard interface. At the top, there is a navigation bar with menu items: TxContact, TxDialer, Campaign, Administration, Reports, Tools, and user information (dialer_admin, omniscorp). Below the navigation bar, the page title is "Dashboard" with a breadcrumb trail: Home > Dashboard. The main content area is titled "Campaigns" and features a search bar and a table of campaign data. The table has columns for Campaign Name, Not Called / CallBack, Loaded, On Call, Called, Failed, and Total. The data is as follows:

Campaign Name	Not Called / CallBack	Loaded	On Call	Called	Failed	Total
ClickToCall	50638/0	403	80	5642	498	56778
MDO Lead	30838/0	240	43	10554	1032	42424
IND-MUM-AUTO	838/0	43	35	53	323	1214
CRMOutbound	7838/0	45	98	903	984	9725

Below the table, it says "Showing 1 to 1 of 1 entries" with "Previous" and "Next" navigation buttons. At the bottom of the dashboard, there is a copyright notice: "©2018 TxDialer | v 2.0.2.0 | All rights reserved. Interlink Network Systems, Inc."

Extensions

Extensions can be added to the TxDialer from the Extensions page. These extensions can be later assigned to the campaign from the campaign's extension page.



Add an Extension :

- Enter an extension.
- Enter the Name of the extension.
- Enter the password for the extension.
- Set the Status of the extension.
- Click on the 'Add' button below.

To Edit an Extension :

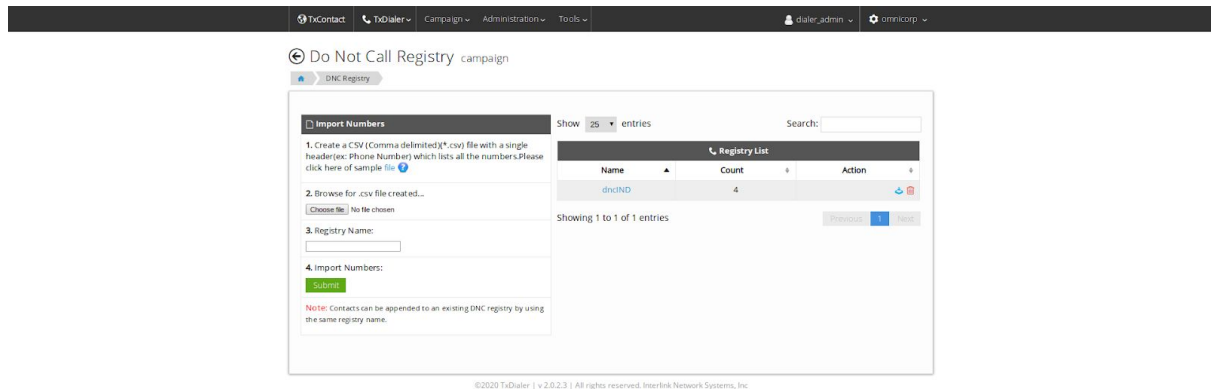
- Click on edit next to the extension to be edited.
- The extension details get populated in the Add/Update form on the left.
- Make appropriate changes,
- Click on the 'Update' button below.

To Delete an extension :

- Click on Delete Icon next to the extension to be deleted.

DNC Registry

Do Not Call Registry gives people a choice about whether to receive telemarketing calls at home, so the dialer needs to make sure it doesn't call out to phone numbers that are registered on DNC lists. The user can add DNC lists to the dialer from this page so that calls are not made to those numbers. The user can add multiple DNC lists to the dialer from this page and run DNC checks on campaigns on DNC lists that are added to TxDialer on the Contacts page of the campaigns.



To Add a DNC Registry :

- Click on 'Choose File' and select a CSV file that contains the phone numbers to be imported to the DNC Registry.
- Enter a DNC Registry Name.
- Click on the 'Import' button below.

To Delete a DNC Registry :

- Click on Delete Icon next to the DNC Registry to be deleted.
- Clicking on the Registry Names takes you to the page below that lists all the phone numbers under that DNC Registry.

To Delete a Phone Number from DNC Registry :

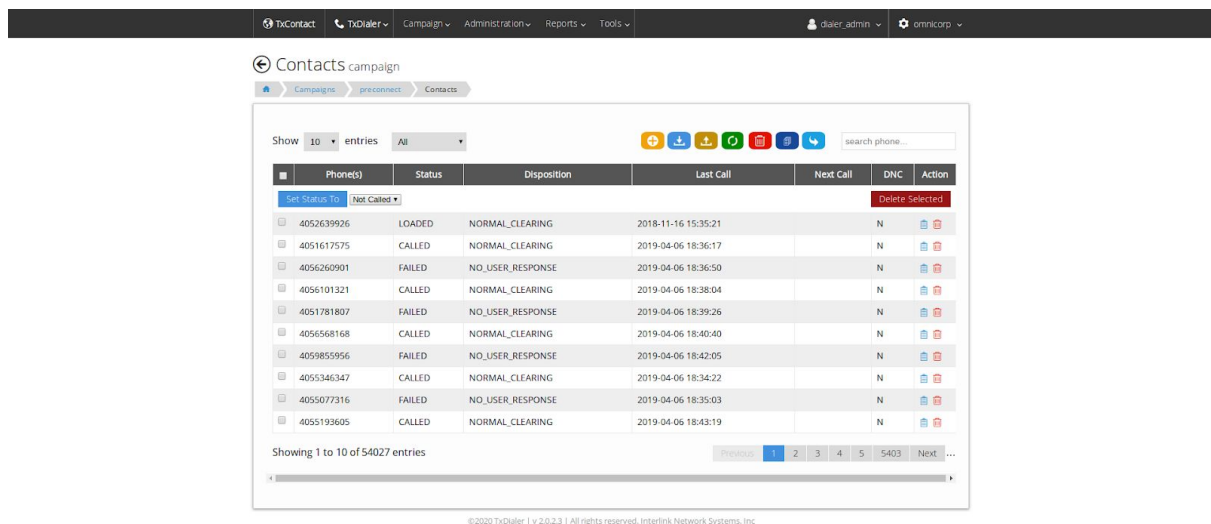
- Click on Delete Icon next to the phone number to be deleted.

Contacts

List Contacts

The list contacts page lists out all the contact details uploaded under that campaign. Contact details include Phone numbers, Retry count, Status (called or not called), contact added time, last called time, worked by (User), Call disposition, DNC(yes or no), along with actions to edit or delete a particular contact. This page contains a filter tool that can filter the contacts based on their status.

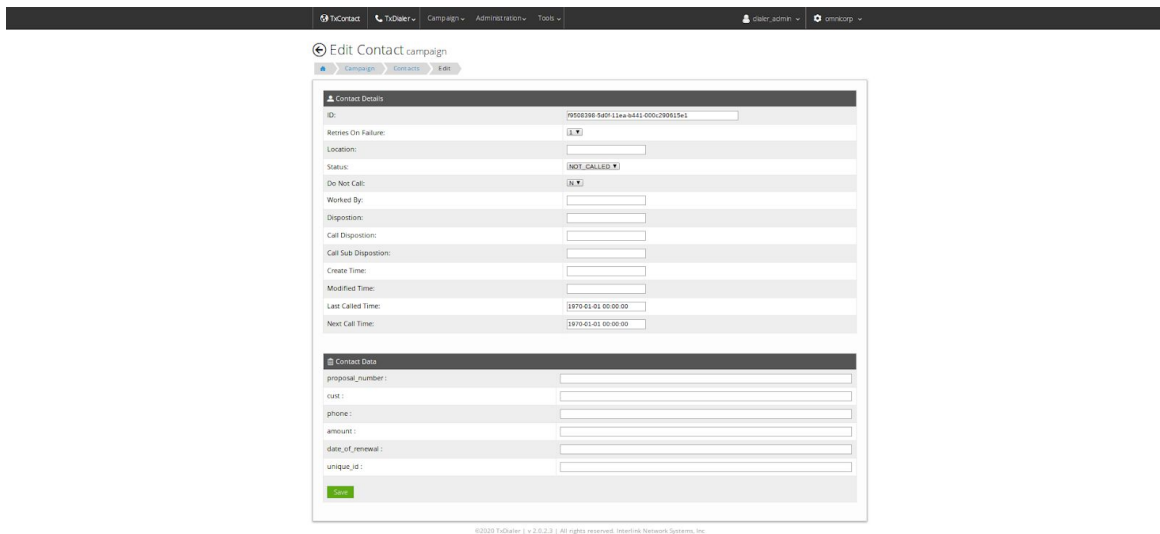
This page provides tools to add, import, export and find the duplicate contacts. This page also provides a useful tool to run DNC checks over the uploaded contacts.



Add/Import Contacts

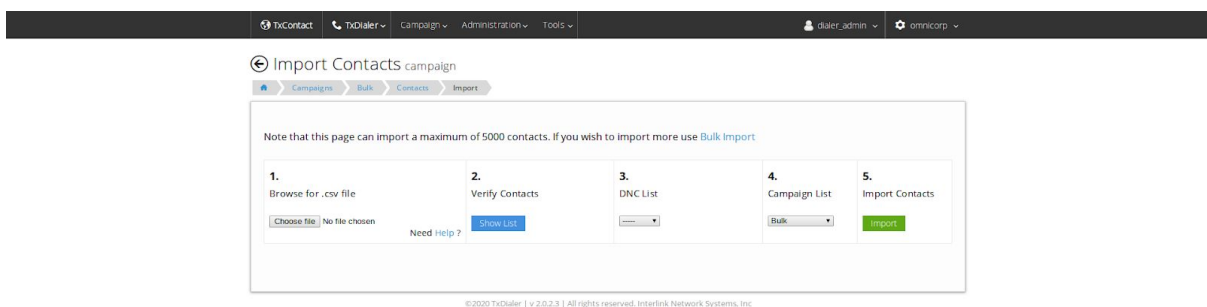
The user can add contacts to any particular campaign either individually or can import contacts from a CSV file.

The Add Contact page allows users to add individual contacts to a campaign. The user should provide basic contact data such as First Name, Mobile Phone, Email, etc.



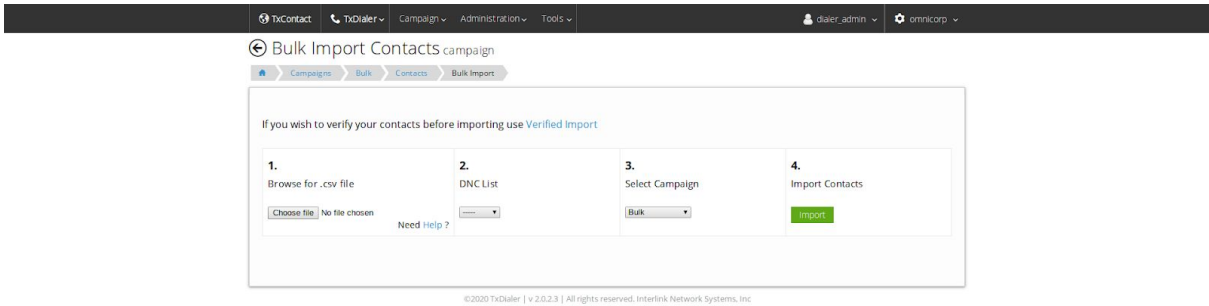
The Import contact page allows users to import contacts from any CSV file. The user should upload the file and click on the 'Show List' button which will list all the contacts. Then the user should select the contacts to be imported. Please note that a maximum of 5000 contacts only can be uploaded using this page. If the user wishes to import more contacts at once he/she should use the 'Bulk Import' feature available.

Below is the import page.



The Bulk Import contact page lets the user import contacts in a bulk quantity. The user should upload a CSV file and import contacts. The importing process will be held in the background while the user can continue with other configurations.

Please note this page does not verify your contacts. If the user wishes to verify the contacts before uploading, he/she may use the Import feature available.



Export Contacts

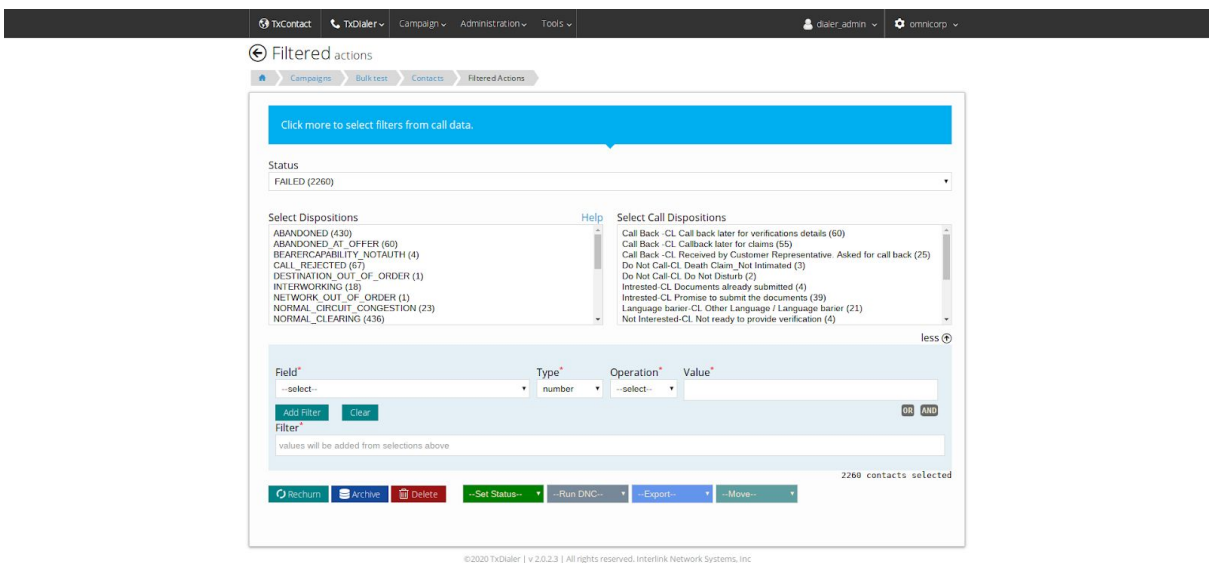
This tool helps the user to export contact data to a CSV file. There are three kinds of export available.

- Export - Exports call data to a CSV file.
- Export Plus - Exports call data and dialer data to a CSV file.
- Export Archives - Exports previously archived data to a CSV file.

Rechurn Contacts

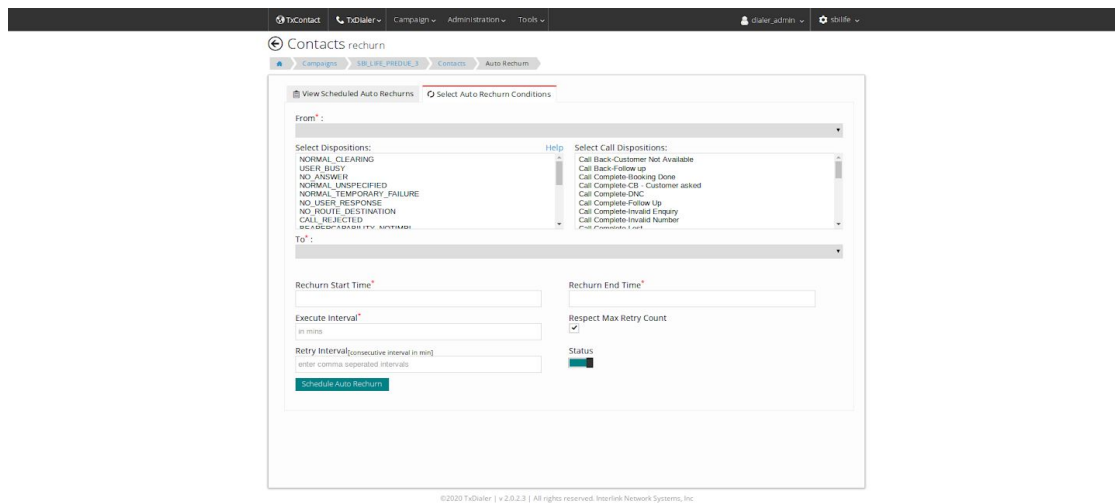
Rechurn can be used to retry the contacts which are previously dialed. Users can either do this manually with the Rechun feature or automate this with Auto-Rechurn.

Manual rechurn can be done based on either dialer disposition or agent disposition as shown in the screenshot below.



An auto rechurns can be used to automate this task. Temporary call failure such as 'Network Failure', 'User_Busy', 'Normal_unspecified' (Dialer Dispositions), etc can be automatically re-dialed using the Auto-Return feature of TxDialer Users can select numbers to be re-churned based on the Dialer Dispositions and Agent Dispositions for

the dialer to load the associated numbers into the dial list. This results in an improved Connect rate and achieves the SLA target.



Delete Contacts

Delete contacts will delete the contacts from the particular campaign.

There are four kinds of deletions available.

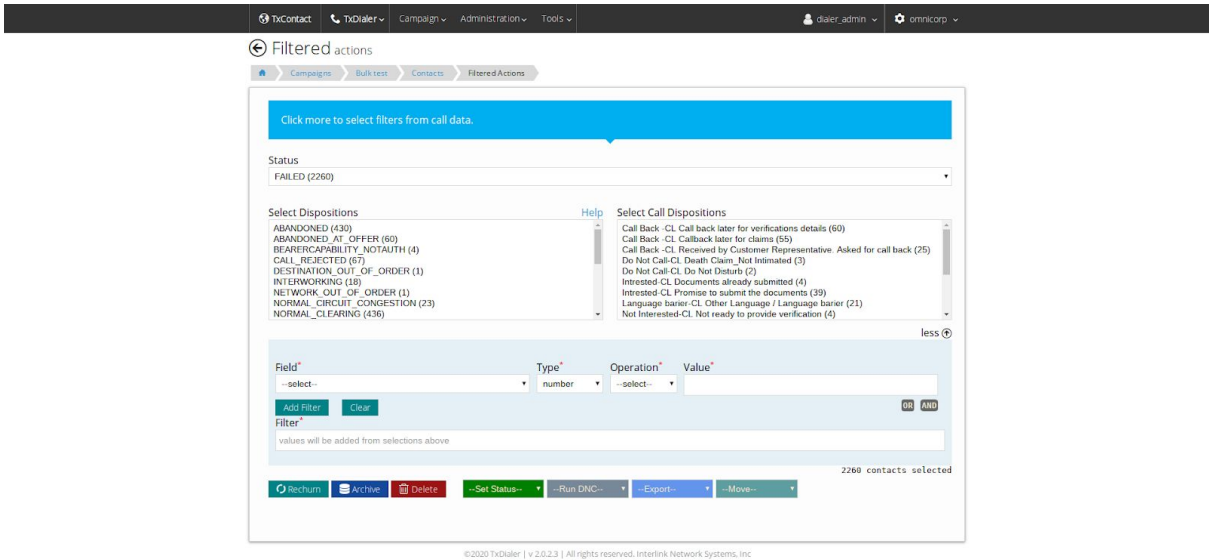
- All Contacts - Deletes all the contacts from the campaign.
- Except CB - Deletes all the contacts except contacts scheduled for the callback.
- Delete Table - Deletes all the contacts along with the call data structure.
- Delete Archives - Deletes all previously archived contacts.

Filtered Actions

Filtered action allows users to perform actions on selective contacts. This feature provides filters on contact status, dialer disposition, agent disposition, call data, and dialer data.

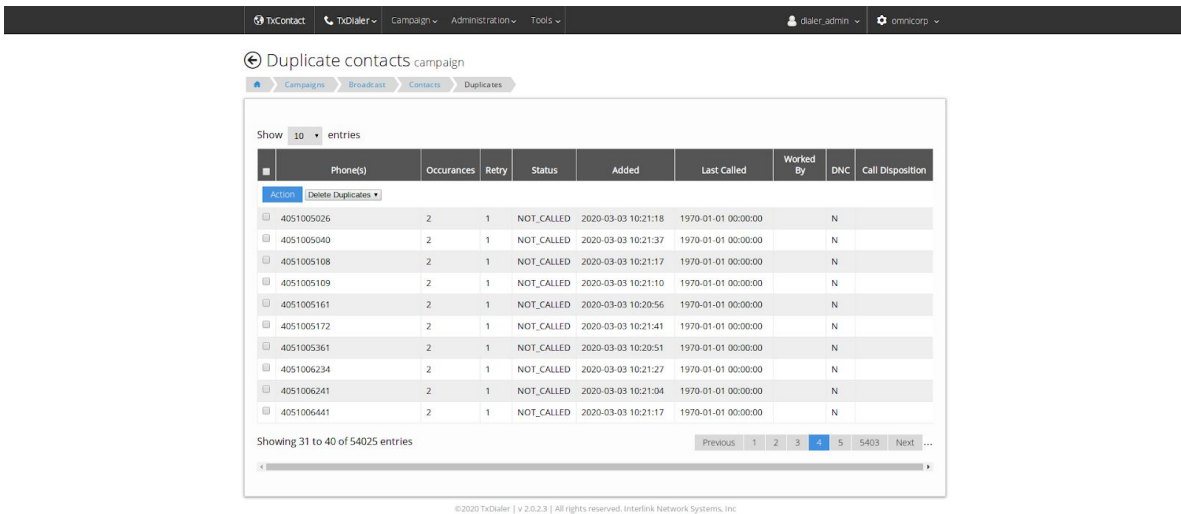
Below actions can be performed in filtered actions:

- Rechurn
- Archive
- Delete
- Set Status
- Run DNC
- Export



Duplicates

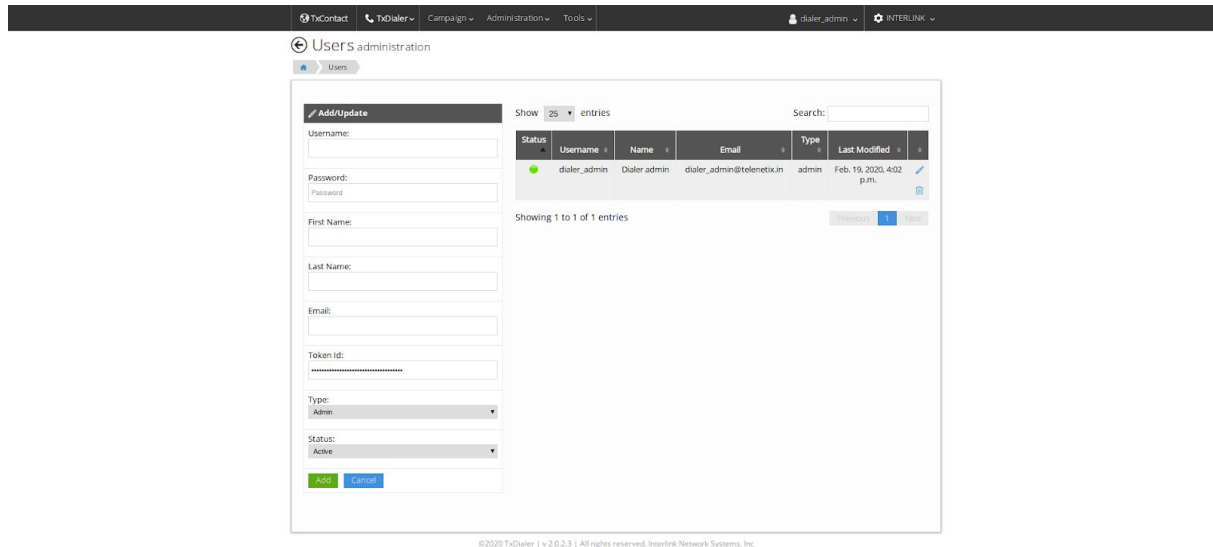
This tool provided by TxDialer to find the duplicate contacts from the list of imported contacts. The page lists out all the duplicate contacts along with the total number of occurrences and other contact details. The user can either delete all contacts or delete duplicate contacts



Administration

Users

This page lists out all the users for TxDiabler . The page also gives an option to add more users , edit and delete the current users.



To add a User

- Enter the username, password, first name, last name, and Email Id.
- Token Id will be auto-generated.
- Select the type of user(admin or supervisor) and set the status for the user(active or inactive).
- After filling all the details, click on the Add button below.

To Edit a User

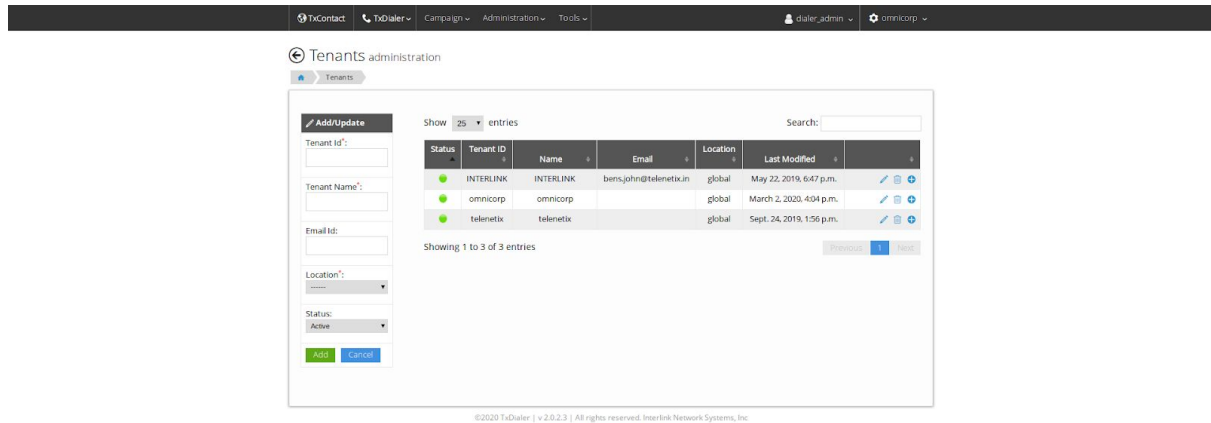
- Click on Edit Icon next to the user to be edited.
- The User details get populated in the Add/Update user form on the left.
- Make appropriate changes to the form.
- Click on the Update button below.

To Delete a User

- Click on Delete Icon next to the User to be deleted.

Tenants

This page lists out all the tenants under TxDialer. It also gives SuperAdmin User, an option to add more tenants, edit and delete the current tenant.



To add a Tenant

- Enter the Tenant Id, Tenant Name and Email Id.
- Set the status for the tenant (active or inactive).
- After filling all the details, click on the Add button below.

To Edit a Tenant

- Click on the Edit Icon next to the tenant to be edited.
- The tenant details get populated in the Add/Update tenant form on the left.
- Make appropriate changes to the form.
- Click on the Update button below.

To Delete a Tenant

- Click on Delete Icon next to the tenant to be deleted.

Agent Interface

TxDialer provides agent login for preview dialing. The user needs to provide login details at the Agent login page, The agent can also use domain login.



Once logged in, the agent is redirected to the home page where the user gets to select from campaigns to which he/she is assigned to.



Agents can click on the 'new' button to fetch contact along with the details.

Once the agent is ready to take the call he/she can click on the call button which will initiate a call to the customer.

After the call is completed the agent can dispose of the call on the same page.

LIC Workspace

Customer Details
Script

New

Campaign Name :	LIC
Phone :	5055054200 - Phone 📞
Status :	Called ⬇
Disposition :	-- select disposition -- ⬇
Sub Disposition :	-- select sub disposition -- ⬇
Comments :	<input style="width: 100%; height: 20px;" type="text"/>
	Submit

id :	61996158-9189-11e8-95f7-000ec4ce90e3
FirstName :	ContactfNBulk510
LastName :	ContactLNBulk510
email :	510abc@xyz.com
status :	LOADED
dialer_disposition :	
agent_disposition :	
agent_sub_disposition :	
retries :	1
DNC :	N
worked_by :	
last_called :	2018-10-22 17:41:42
next_call_time :	1970-01-01 00:00:00
create_time :	2018-07-27 16:09:46

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