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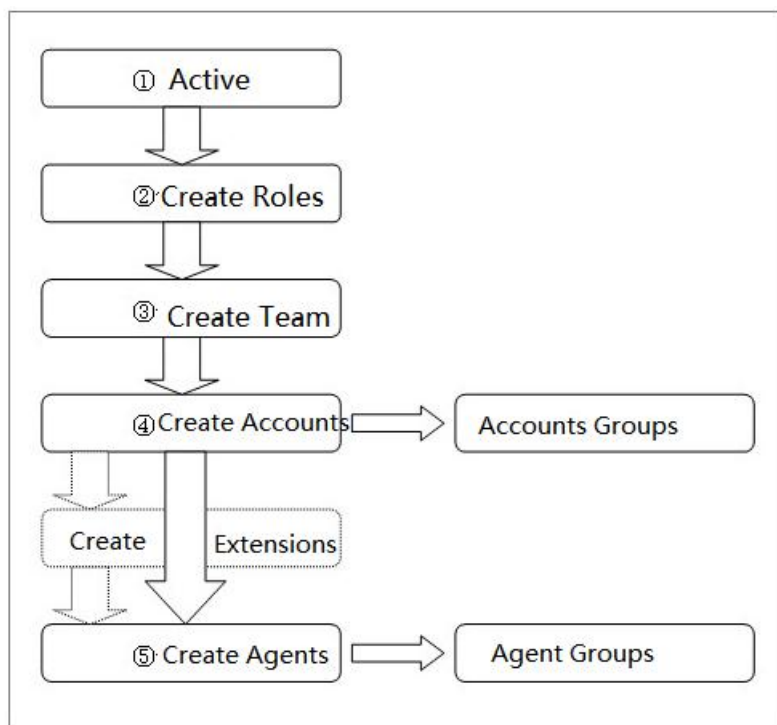
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1. Accounts and Privilege

1.1 VINA-PBX Accounts Structure



The basic unit of VINA-PBX is account. Every team member needs his account and password to login the system, and it is also the basic unit for rating.

There are three kinds of accounts:

- System Administrator
- Team Administrator
- User

Only after setting the accounts can add extensions and set agents on the system be done. That is because every extension or agent belongs to an account.

The different kinds of accounts relates to different kinds of privilege. Such as the system administrator can manage the entire system and team manager can manage his team, but the user can only see his own info.

In addition to the account, the system also supports the role configuration. Roles are used to define their accounts' privilege on different modules, including viewing, editing, deleting, exporting.

At the same time in order to facilitate the management, the system also introduces the user group and agent group.

User groups are mainly used to limit their extensions' calling authority.

The agent groups are for tasks allocation.

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User groups are mainly used to limit their extensions' calling authority.

The agent groups are for tasks allocation.

1.2 Teams

The teams are like different companies. Each team has unrelated extension numbers, agent numbers, rates. And agnts, extensions and queues etc. belong to a team. Therefore the very first step of setting up the system should be to add a team.

In the manage list on the left side, click **User** -> Teams, then you will enter the page of the figure below to add a team:

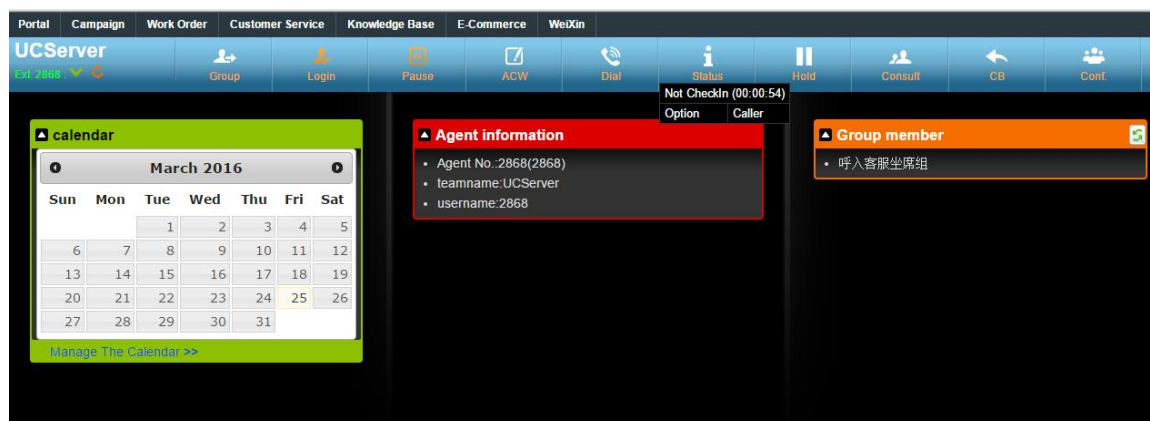
- **Name***: the name of the custom team, eg: VINA-PBX;
- **Identity***: identify your own team so it can be distinguished from others. It must be unique and composed of numbers or letters;



The identity can not be modified after being created.

- **Max Account Num***: the maximum number of the accounts permitted in the team;
- **Max Agent Num***: the maximum number of the agents permitted in the team;

- **Max Device Num*:** the maximum number of the devices permitted in the team;
- **Max Queue Num*:** the maximum number of the queues permitted in the team;
- **Max MeetRoom Num*:** the maximum number of the conference rooms permitted;
- **Trunk Type:** set the outbound trunk for the team members. you can choose "trunk" or "trunk group" according to the situation;
 - Trunk is a line that can be allocated, such as voipstunt;
 - Trunk group consists of a few existing lines, arranging multiple trunks, so that the outbound calls will be able to choose an available trunk when the initial one doesn't work.
 - Pre-paid, when the money is insufficient, the calls can be made no more, which means you must pay the bill before hand.
- **Allow Internal Calls:** whether inside calls within the team is allowed;
- **Monitor Force:** whether to allow mandatory recording. Off by default; If set enable, the system will record forcibly for all accounts and extensions of this team, including inbound calls and out bound calls.
- **Limit Type(Dial Limit Type):** no limit, postpaid or prepaid. Each account will have a certain amount of funds used to call. When money runs out, you can choose whether the calls can still be made or not.
 - No-limit means there is no limitation towards the calls;
 - Post-paid means the money spent cannot exceed the amount limit;
 - Pre-paid, when the money is insufficient, the calls can be made no more, which means you must pay the bill before hand.
- **Agent REC file access(Record&CDRs):** No Access(No) means no need of recording or CDRs. CDRs&Recordings means the system will do CDRs and recording for these team members. Recording means the system will only do recording.
- **Rec Condition:** Answer means the system will only record answering calls. All means the system will record both received calls and answering calls.
- **Display Name:** for controlling the name displayed in the agent platform; The maximum length of the field is 15 characters.

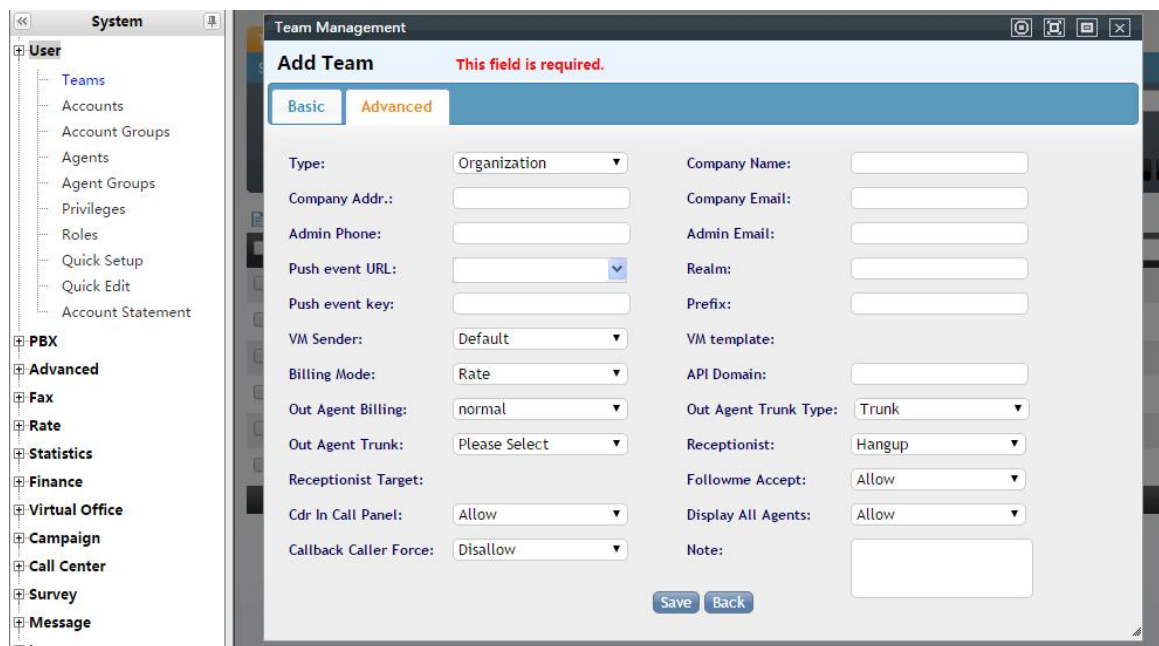


- **LOGO:** The uploaded logo will display when the agent login his background.
- **Language:** Set the default language for your team.

Note: * Items are obliged to fill, the rest can be filled out when you find it necessary. when you complete, click "Save" button.

Advanced

- Type: Your company's type
- Company Name
- Company Addr
- Company Email
- Admin Phone



The screenshot shows the 'Team Management' window with the 'Add Team' form. The 'Advanced' tab is selected. The form contains the following fields:

- Type: Organization (dropdown)
- Company Name: (text input)
- Company Addr.: (text input)
- Company Email: (text input)
- Admin Phone: (text input)
- Admin Email: (text input)
- Push event URL: (dropdown menu)
- Realm: (text input)
- Push event key: (text input)
- Prefix: (text input)
- VM Sender: Default (dropdown)
- VM template: (text input)
- Billing Mode: Rate (dropdown)
- API Domain: (text input)
- Out Agent Billing: normal (dropdown)
- Out Agent Trunk Type: Trunk (dropdown)
- Out Agent Trunk: Please Select (dropdown)
- Receptionist: Hangup (dropdown)
- Receptionist Target: (text input)
- Followme Accept: Allow (dropdown)
- Cdr In Call Panel: Allow (dropdown)
- Display All Agents: Allow (dropdown)
- Callback Caller Force: Disallow (dropdown)
- Note: (text area)

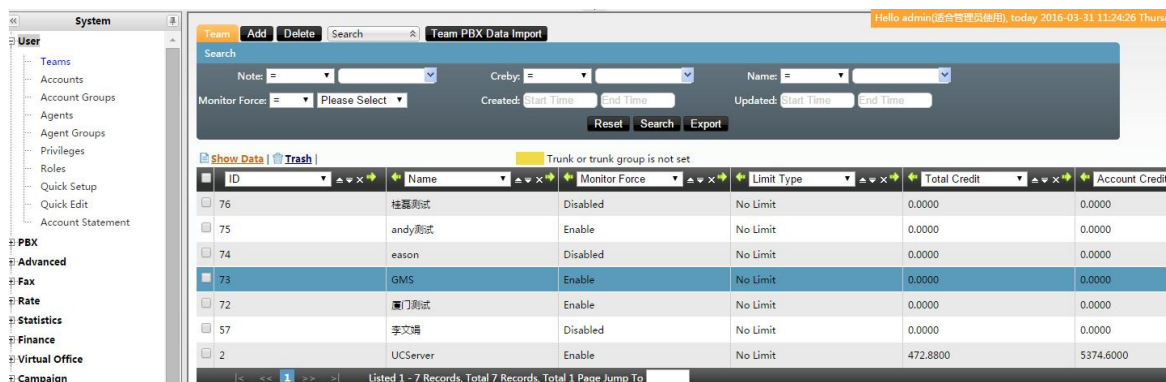
Buttons: Save, Back

- Admin EMAIL
- Push event URL
- Realm
- Prefix: If set, this prefix is required when calls made from other team within the same system.
- VM Sender
- VM Template
- Billing Mode: By rate or minute
- API Domain
- Out Agent Billing
- Out Agent Trunk Type:
- Out Agent Trunk
- Receptionist
- Followme Accept
- Cdr In Call Panel
- Display All Agents:
- Callback Calller Force

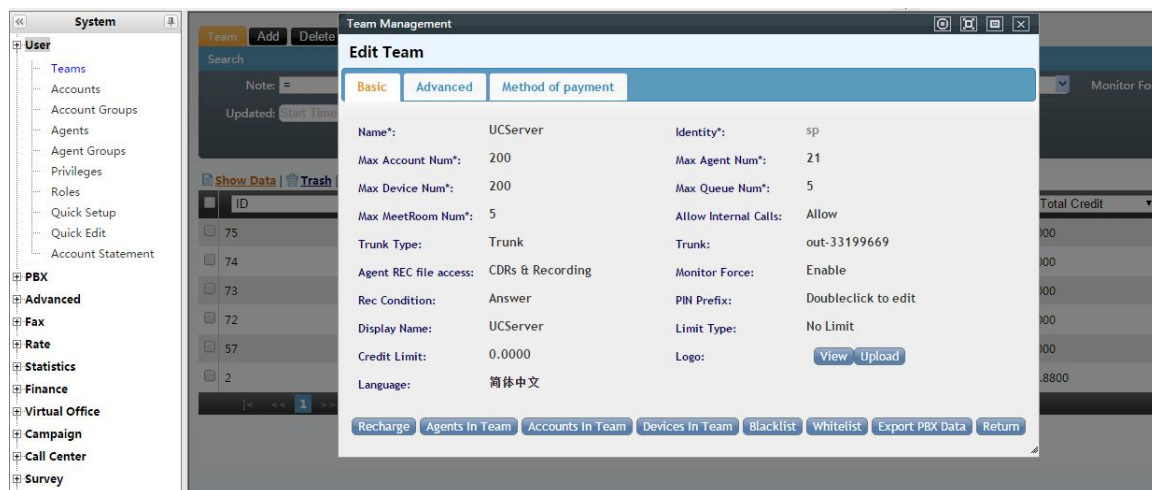
- Note

Edit Team

After closing the team management page, you will see the data already added in.

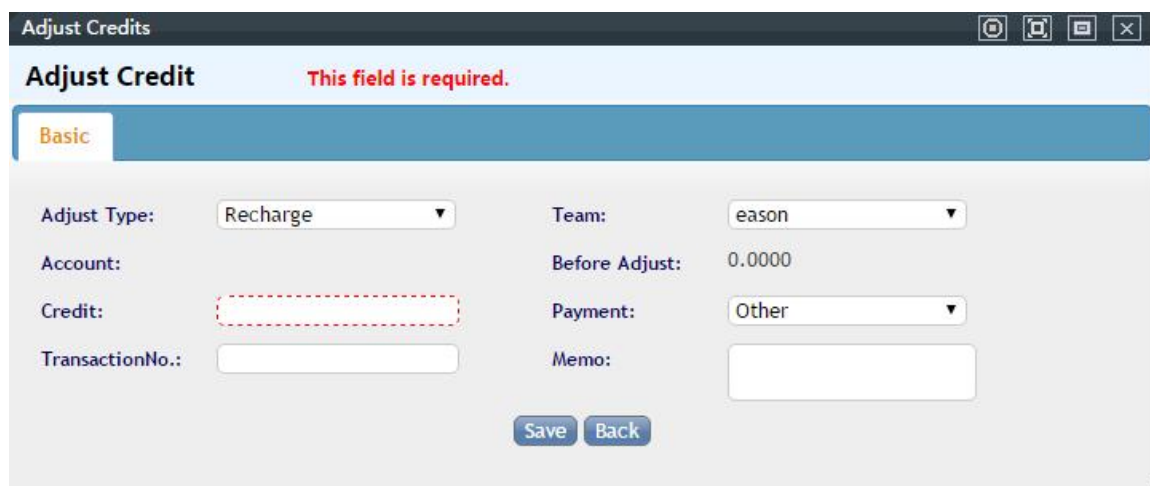


Double click your team to edit it. The characters in black can be edited, and the grey ones are only for view.

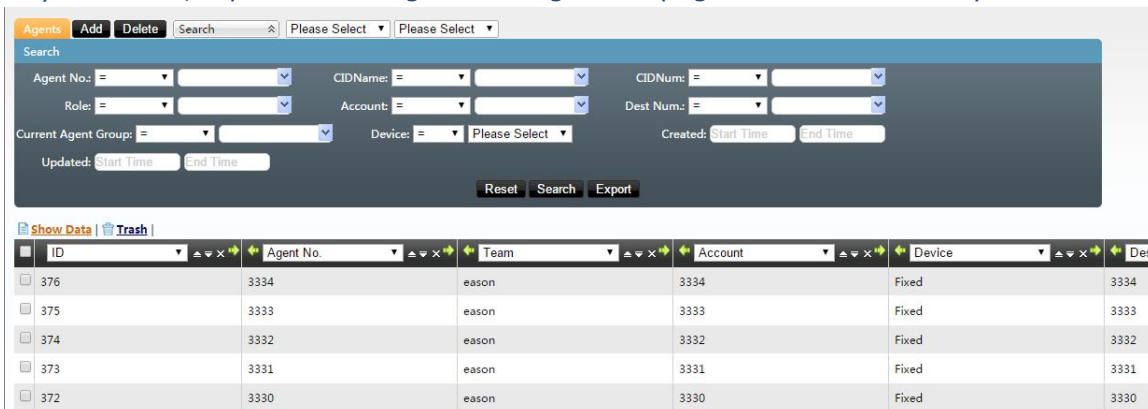


There are eight more buttons appearing on the bottom of the edit page:

- Recharge:** Click it and a new window will popup which shows how to do recharging for your team.

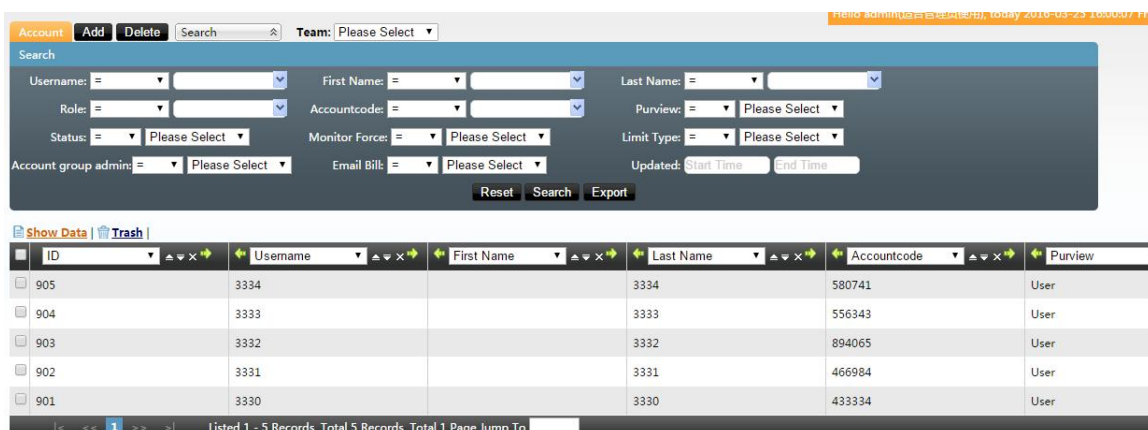


- **Agents in Team:** Click it and a new window will popup which shows all the agents in your team, equals to the agent management page. You can search by team.



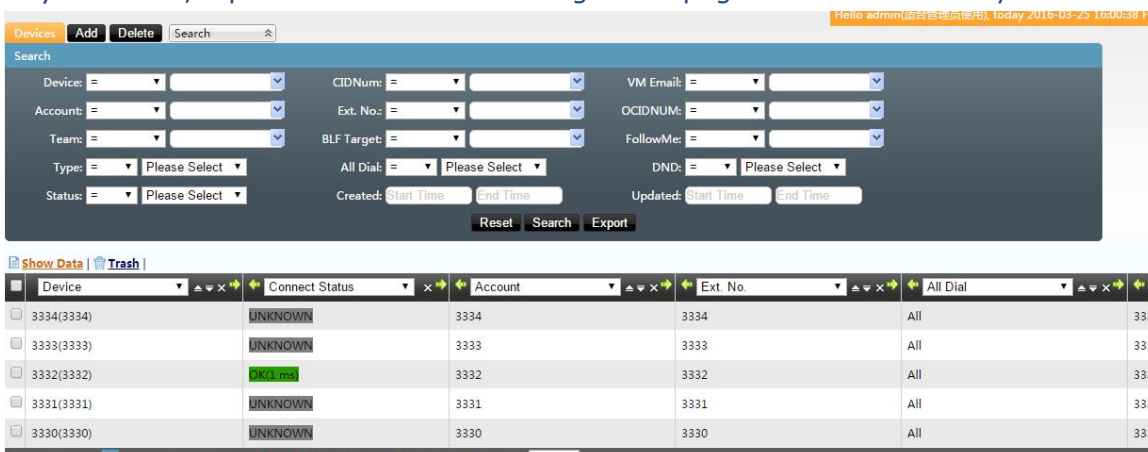
ID	Agent No.	Team	Account	Device	Dest
376	3334	eason	3334	Fixed	3334
375	3333	eason	3333	Fixed	3333
374	3332	eason	3332	Fixed	3332
373	3331	eason	3331	Fixed	3331
372	3330	eason	3330	Fixed	3330

- **Accounts in Team:** Click it and a new window will popup which shows all the accounts in your team, equals to the accounts management page. You can search by team.



ID	Username	First Name	Last Name	Accountcode	Purview
905	3334		3334	580741	User
904	3333		3333	556343	User
903	3332		3332	894065	User
902	3331		3331	466984	User
901	3330		3330	433334	User

- **Devices in Team:** Click it and a new window will popup which shows all the devices in your team, equals to the devices management page. You can search by team.

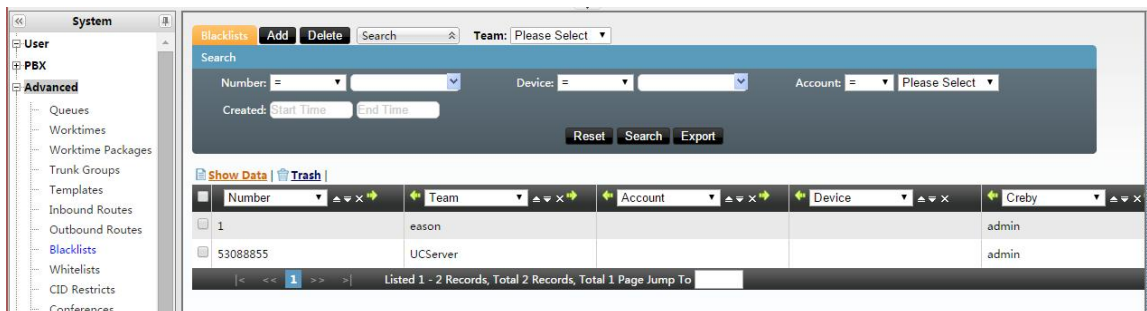


Device	Connect Status	Account	Ext. No.	All Dial	Dest
3334(3334)	UNKNOWN	3334	3334	All	3334
3333(3333)	UNKNOWN	3333	3333	All	3333
3332(3332)	OK (1 min)	3332	3332	All	3332
3331(3331)	UNKNOWN	3331	3331	All	3331
3330(3330)	UNKNOWN	3330	3330	All	3330

- **Blacklist:** Click it and a new window will popup where you can check and add blacklist here. Enter the numbers, click [Add to blacklist] button, and all the numbers in the blacklist will not be able to dial in to your team.



- ◆ Blacklist are numbers be forbidden to call into your team.
- ◆ Click Advanced →Blacklists, can also open Blacklists



- **Whitelists:** Click it and a new window will popup where you can check and add whitelist here. Enter the numbers, click the [Add to White List] button, and only the numbers in this list are able to dial in to your team
- Whitelists are numbers which allows to call into the team
- Click Advanced →Whitelists, can also open Whitelists
- **Export PBX Data:** Click it then the team's data will be exported and saved under Call Center—Shell Exports.

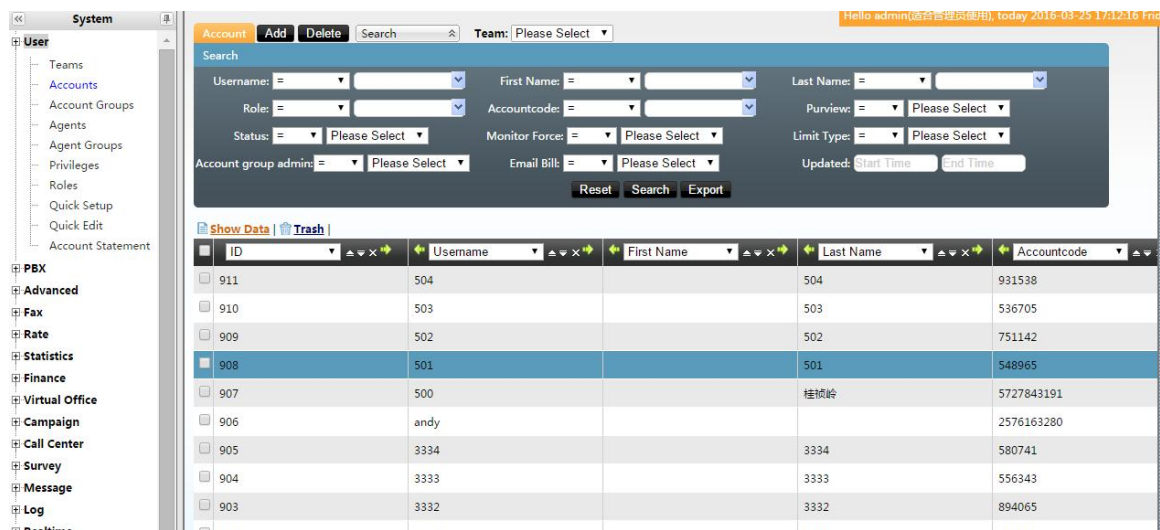
Note

Only administrator has the right to create a team.

1.3 Accounts

Account is the basic unit of system users, by setting different account types and roles, which will limit their use of the system's functions

Click User→Account,it will show all the accounts in the system.

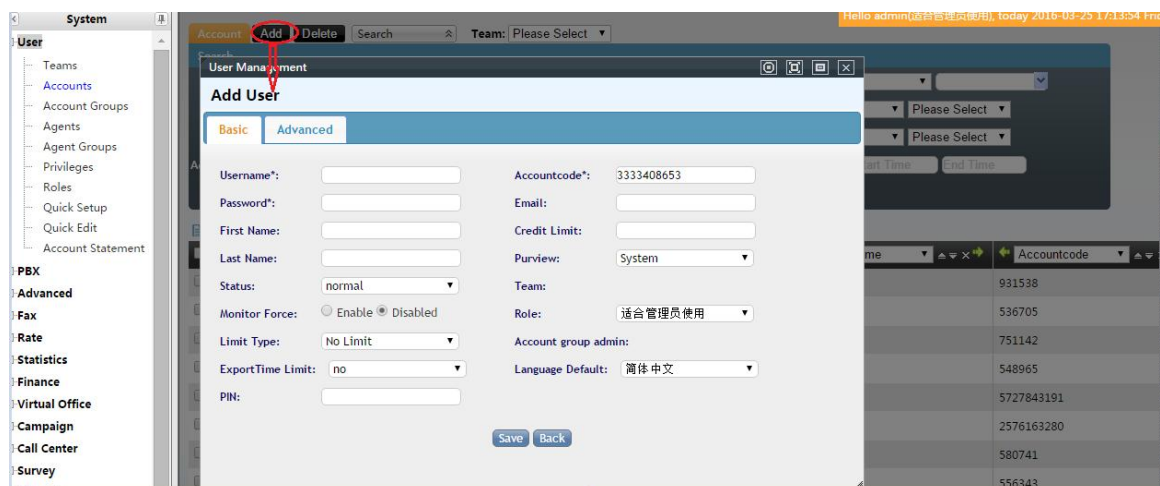


The screenshot shows the 'User Management' interface. On the left is a sidebar with a tree view containing: System, User (Teams, Accounts, Account Groups, Agents, Agent Groups, Privileges, Roles, Quick Setup, Quick Edit, Account Statement), PBX, Advanced, Fax, Rate, Statistics, Finance, Virtual Office, Campaign, Call Center, Survey, Message, and Log. The main area has a top bar with 'Account' tab, 'Add', 'Delete', 'Search', and 'Team: Please Select'. Below this is a search form with fields for Username, First Name, Last Name, Role, Accountcode, Purview, Status, Monitor Force, Limit Type, Account group admin, Email Bill, and Updated (Start Time, End Time). There are 'Reset', 'Search', and 'Export' buttons. Below the search form is a table with columns: ID, Username, First Name, Last Name, and Accountcode. The table contains several rows of data, with row 908 highlighted in blue.

ID	Username	First Name	Last Name	Accountcode
911	504		504	931538
910	503		503	536705
909	502		502	751142
908	501		501	548965
907	500		桂树岭	5727843191
906	andy			2576163280
905	3334		3334	580741
904	3333		3333	556343
903	3332		3332	894065

Add Account

Click Add to add new accounts



The screenshot shows the 'Add User' dialog box. The 'Basic' tab is selected. The form contains the following fields: Username*, Password*, First Name, Last Name, Status (normal), Monitor Force (radio buttons for Enable and Disabled, with Disabled selected), Limit Type (No Limit), ExportTime Limit (no), PIN, Accountcode* (3333408653), Email, Credit Limit, Purview (System), Role (适合管理员使用), Account group admin, and Language Default (简体中文). There are 'Save' and 'Back' buttons at the bottom.

Mandatory fields

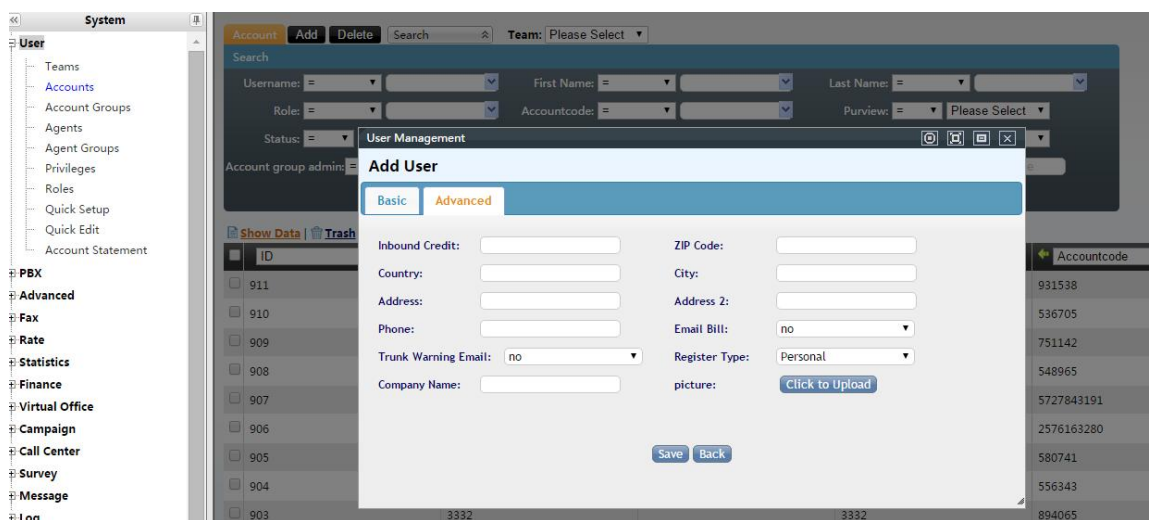
- **Username*:** which may consist of letters, numbers, characters, underscores and @, served as the login user name displayed in the system. Within one team, there should not be any same name. You can not use the system administrator's user name as your user name;
- **Account code*:** a string of numbers generated by the system automatically to identify you in the system, which will never change;
- **Password*:** The password used to login the system;
- **Email:** Enter your e-mail address that we can connect with you via it, and the system-related business information will be sent to this mailbox;
- **First Name:** The account's first name
- **Purview:** Set the purview for this account. There are three kinds of privilege available: System, team, and users.
 - **System:** The account will have the system administrator's privilege. It can manage the whole system and all the accounts. This is the highest privilege.

- Team: The account will be the team administrator, which manage all the accounts under its team.
- User: The account is the common user , and have common privilege.
- **Status:**Enable or disable this account.The default is enable.
- **Monitor Force(Record):** whether to mandatorily record this account, forbidden by default.
- **Role:** the account is to be appointed to a certain role, so he will have the rights under this name;
- **Limit Type(Dial Limit Type):** no limit, postpaid or prepaid. Each account will have a certain amount of funds used to call.When money runs out, you can choose whether the calls can still be made or not.
- No-limit means there is no limitation towards the calls;
- Post-paid means the money spent cannot exceed the amount limit;
- Pre-paid, when the money is insufficient, the calls can be made no more, which means you must pay the bill before hand.
- **Export Time Limit:** If set yes,when the account does exporting mission, it has to obey the time sets on the system. The default is No.
- **Language Default:** Set the default language for your account.
- **PIN:XX**

Optional

- **Last Name:** The account's last name
- **Credit Limit:** The amount of money allowed to exceed;If the Limit Type is post-paid or prepaid, the max credit limit has to be set accordingly.
- **Team:** Add the account to a team.This option will be active when the account's purview is a manager or user.
- **Account Group Admin:** It is allowed to have several account groups in a team, here this account can be set as the administrator of the group.. Only when the account's purview is user need this setting.

Advanced



The screenshot displays the EQUINET User Management interface. On the left is a sidebar menu with categories like System, User, PBX, and Advanced. The main area shows a 'User Management' window with an 'Add User' form. The form has two tabs: 'Basic' and 'Advanced'. The 'Basic' tab is active, showing fields for Inbound Credit, Country, Address, Phone, Trunk Warning Email, Company Name, ZIP Code, City, Address 2, Email Bill, Register Type, and a picture upload button. The 'Advanced' tab is also visible. Below the form is a table with columns for ID and Accountcode, listing various user accounts.

- **Inbound Credit:** When this account's role is agent, and we have set inbound calling fee to this agent, then this field will show its total inbound calling fee.
- **ZIP Code:**
- **Country:**
- **City:**
- **Address:**
- **Address2:**
- **Phone:**
- **Email Bill:** If set yes, the bill will send to your email address. The default is No.
- **Trunk Warning Email:** If set yes, when the trunk dead, it will send warning to your email address. The default is No.
- **Register Type:** Personal or organization
- **Company Name**
- **Picuture(Profile Image):** This account's profile image

Note

* Items are obliged to fill, the rest can be filled out when you find it necessary. when you complete, click "Save" button.

Edit Account

We add three more wizards to the accounts with the purview of user. (View Device, Add Device and Config Agent). The other purview doesn't have these wizards. The rest wizards are common for all account purview.

View Device: This page shows all the extensions under this account. Click View Detail, it will go to PBX-> Devices. You can edit these extensions if needed. It equals to device edit function.

User	devicename	secret	deviceexten	devicestatus	Detail	Delete
andy测试-504	504	504	504	Enable	ViewDetail	<button>Delete</button>

Return

Add Device: It equals to PBX->Devices->【Add】.You can add extensions to this account if needed.

Add Device

Basic | **Advanced**

Device Name*:	<input type="text"/>	Secret:	<input type="text"/>
Team*:	<input type="text" value="eason"/>	Account*:	<input type="text" value="3334"/>
Ext. No.*:	<input type="text"/>	DND*:	<input type="text" value="no"/>
CIDNum:	<input type="text"/>	CIDName:	<input type="text"/>
OCIDNUM:	<input type="text"/>	OCIDNAME:	<input type="text"/>
Username:	<input type="text"/>	Device Type*:	<input type="text" value="SIP"/>
Status*:	<input type="text" value="Enable"/>	Templates:	<input type="text" value="default sip device"/>
ExteralNumber:	<input type="text"/>	All Dial:	<input type="text" value="All"/>
Timeout:	<input type="text" value="30"/>	MgcplLine:	<input type="text"/>

OK Return

Config Agents: It equals to Users->Agents->【Add】.You can add,edit and delete agent if needed.

Agent Management

Config Agent

Basic | **Advanced**

Agent No. *: Password *:

Team: Account:

Device: Dest Num.:

Status: Role:

Agentname: Email:

agentno	isdevice	dest	Delete
3334	Fixed	3334	<input type="button" value="Delete"/>

- **Blacklist:** Click it and a new window will popup where you can check and add blacklist here. Enter the numbers, click [Add to blacklist] button, and all the numbers in the blacklist will not be able to dial in to your team.

Add Blacklist

Blacklist

CIDNum:

CIDNum	Delete
1	<input type="button" value="Delete"/>

- ◆ Blacklist are numbers be forbidden to call into your team.
- ◆ Click Advanced → Blacklists, can also open Blacklists

System

User

PBX

Advanced

Queues

Worktimes

Worktime Packages

Trunk Groups

Templates

Inbound Routes

Outbound Routes

Blacklists

Whitelists

CID Restricts

Conferences

Blacklists |

Search

Number: Device: Account:

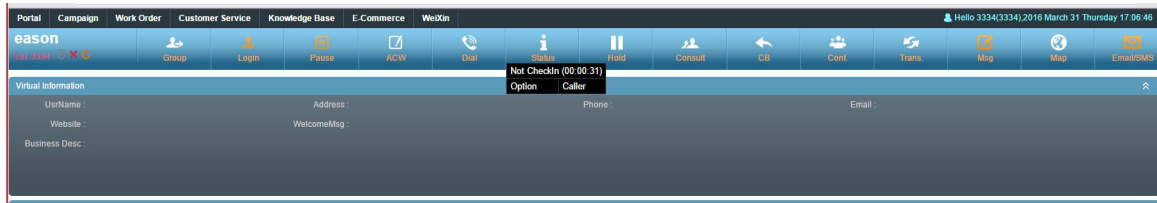
Created:

Number	Team	Account	Device	Creby
1	eason			admin
53088855	UCServer			admin

Listed 1 - 2 Records, Total 2 Records, Total 1 Page Jump To

- **Whitelists:** Click it and a new window will popup where you can check and add whitelist here. Enter the numbers, click the [Add to White List] button, and only the numbers in this list are able to dial in to your team
- Whitelists are numbers which allows to call into the team
- Click Advanced → Whitelists, can also open Whitelists

- **Login as account:** Click it and the page will turn to this account's login page. It will load the agent desk, agent administrator's desk, IVR CDRs, etc.

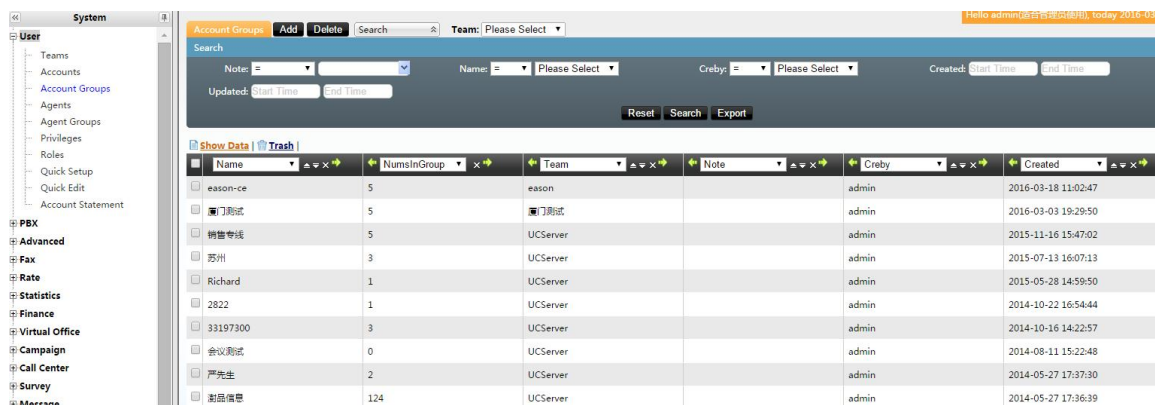


1.4 Account Group



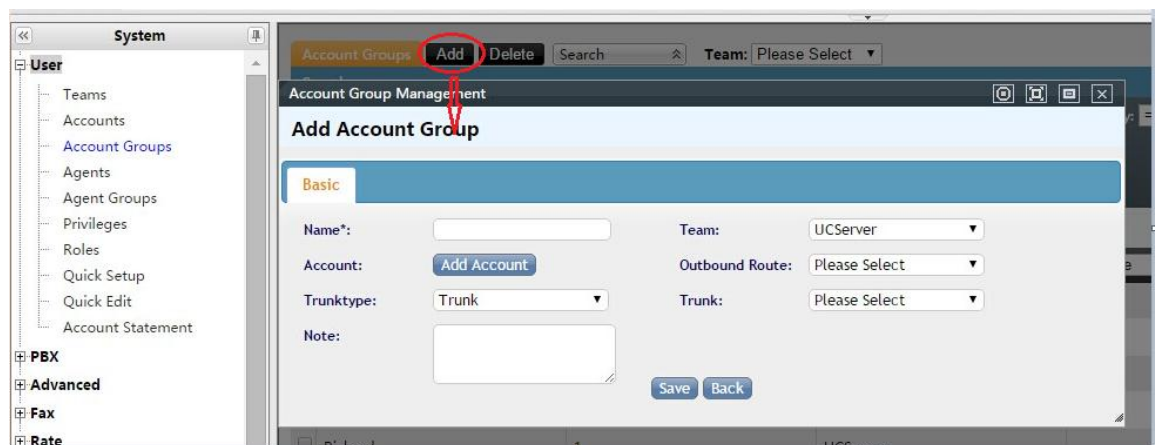
The account group is used to help Rate management → Agent incoming call rate management. You can put the accounts with the same policies into a group to unify the charge calculation, which can simplify the management of the numerous accounts and agent rates.

Under the manage list on the left side, click Users → Account groups management, enter the page as below to add an account groups:



Add Account Group

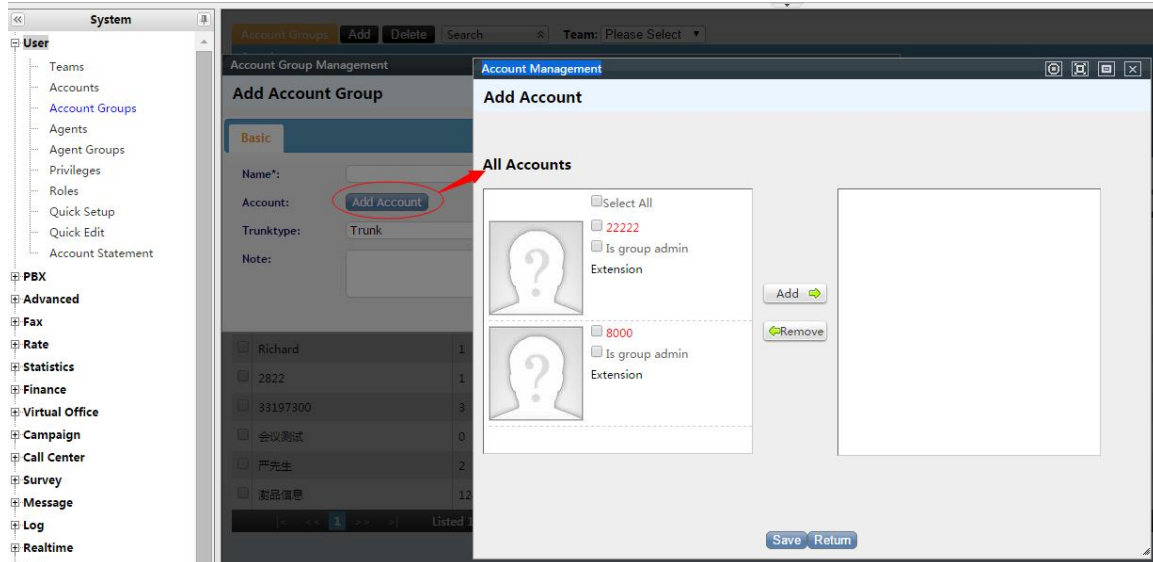
Click **Add** to add a new account group



Mandatory fields

- **Name:** Write a name for your group as an identification

- **Team:** You can choose which team you belong to. And only the accounts under this team can get in this group.
- **Account:** Click the button "Add account" to enter the page where you can choose the accounts.



The accounts which can be chosen into the group are listed on the left, click the "Add" button to add them into the group. The accounts in the list on the right are those already in the account group, you can click "Remove" button to remove them.

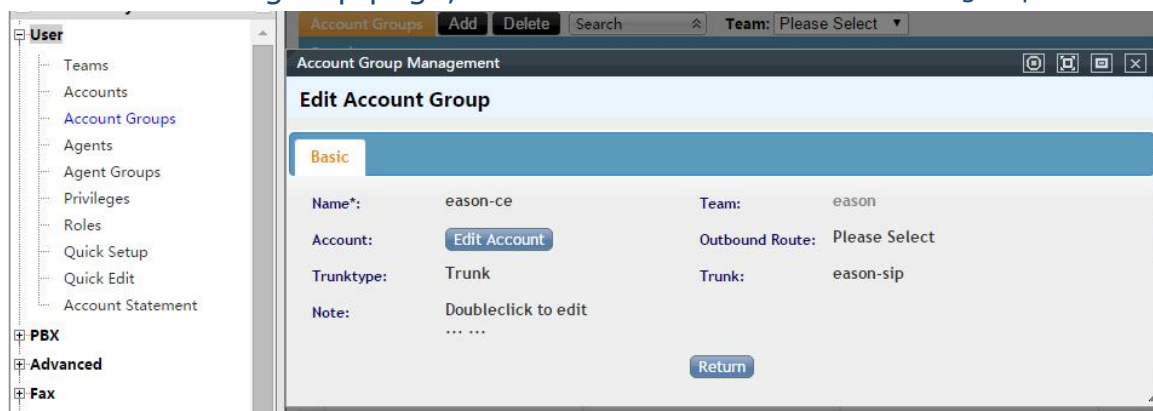
Optional FielDs

- **Outbound Route:** Add an outbound route to this account group;
- **Trunk:** Whether set a trunk or trunk group to this account group;
- **Trunk/Trunk Group:** :Choose the trunk name and trunk group name;
- **Note:** Leave a note on this account group for reminding.

When you finished this step, click "Save" button and a new account group is completed.

Edit the account group

On the account group page, double-click the new added account group to edit it.



The information in black means they are editable, and the grey ones are not.

The "Edit the account" button means exactly the same as adding accounts. They are all for adding or removing accounts of the group.

At this point, you have already known how to set up a team and an account.

1.5 Agent

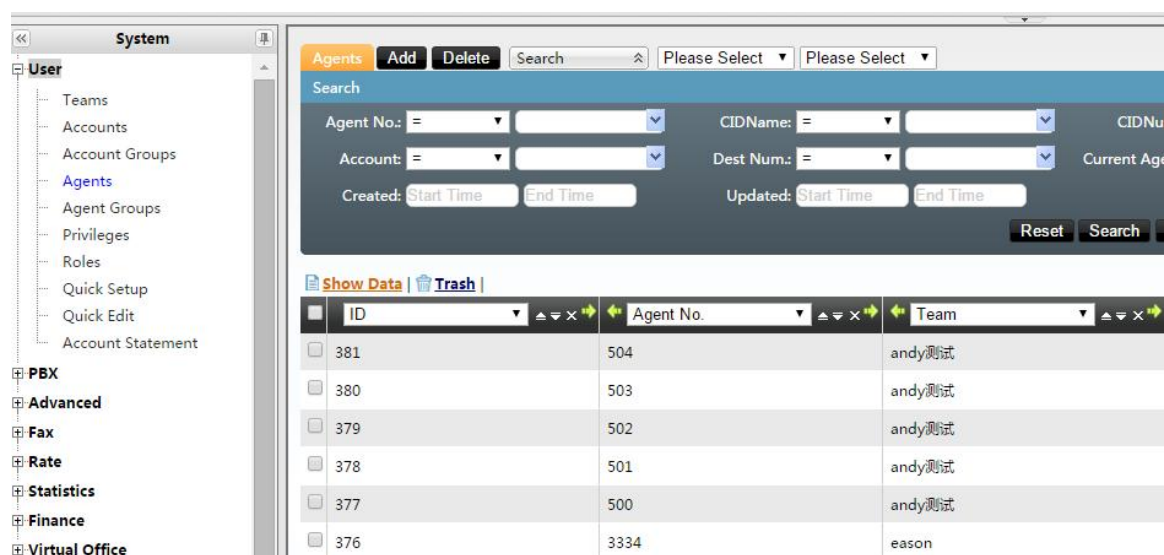
Agent is the one who take care of call center task. Every agent account is associated with a system account. Each agent has a unique job numbers consists of digits. This job number is mainly the agent's identity in the system. In addition, in some applications, before call established, the caller will hear an announcement that "number XXXX service for you,". So agents' job numbers must consists of digits.

Each agent has a phone numbers, it can be system extension or other effective phone numbers.

When agents using click to call function, the system will call agent firstly, then call the target numbers.

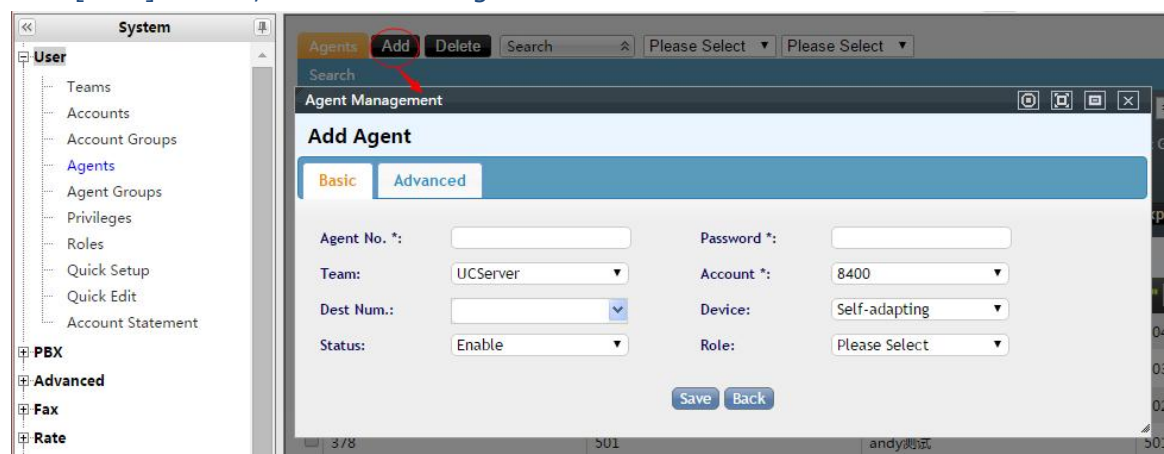
Add Agent

Management list, click on the Users -> Agents into the agent management page.



ID	Agent No.	Team
381	504	andy测试
380	503	andy测试
379	502	andy测试
378	501	andy测试
377	500	andy测试
376	3334	eason

Click **[Add]** button, to add a new agent:



Add Agent

Basic | **Advanced**

Agent No. *: Password *:

Team: Account *:

Dest Num.: Device:

Status: Role:

Save **Back**

Mandatory fields

- **Agent No.:** It is the identification of the agent. The agent numbers should not be the same as other agents's in the same group, and it must consist of digits
- **Password:** Please use numbers only, it is the agent login password;
- **Team:** Select a team to this agent;
- **Account:** Select an account to this agent;

Optional Fields

- **Device:**
 - **Fixed:** If set fixed, means this agent is corresponding to a fixed extension, and this extension can not be changed;
 - **Dynamic:** If set dynamic, means this agent can change its corresponding extension. Please refer to agent page on how to change it;
 - **Self-adapting:** The agent will match an extension automatically;
- **Dest Num:** The account's corresponding phone numbers. It can be the extension or other inused numbers, like cellphone numbers or analogue phone numbers.
- **Status:** Enable or disable this account. The default is enable.
- **Role:** The agent is to be appointed to a certain role, so he will have the rights under this role (It is also the main menu of agent login page) ;

Advanced

The screenshot shows a web application window titled 'Agent Management'. Inside, there's a section titled 'Add Agent' with a red error message 'This field is required.' above it. Below this, there are two tabs: 'Basic' and 'Advanced'. The 'Advanced' tab is selected. The form contains several input fields: 'Bank Name', 'Bank Account', 'Bank ZIP', 'Account Name', 'Ignore CF' (a dropdown menu currently showing 'Outbound'), 'Application Code', 'CIDName', 'CIDNum', and a 'Note' field. At the bottom right of the form, there are 'Save' and 'Back' buttons.

- **Bank Name:** The agent's bank name. (Make payment to parttime agent);
- **Bank Account:**
- **Bank ZIP:**
- **Account Name:**
- **Ignore CF (Call Forward):** When agent logs in, the system will ignore the call forward function set for this extension;
- **Application Code:** It is for verifying when sending a request by API;
- **CID Name:**

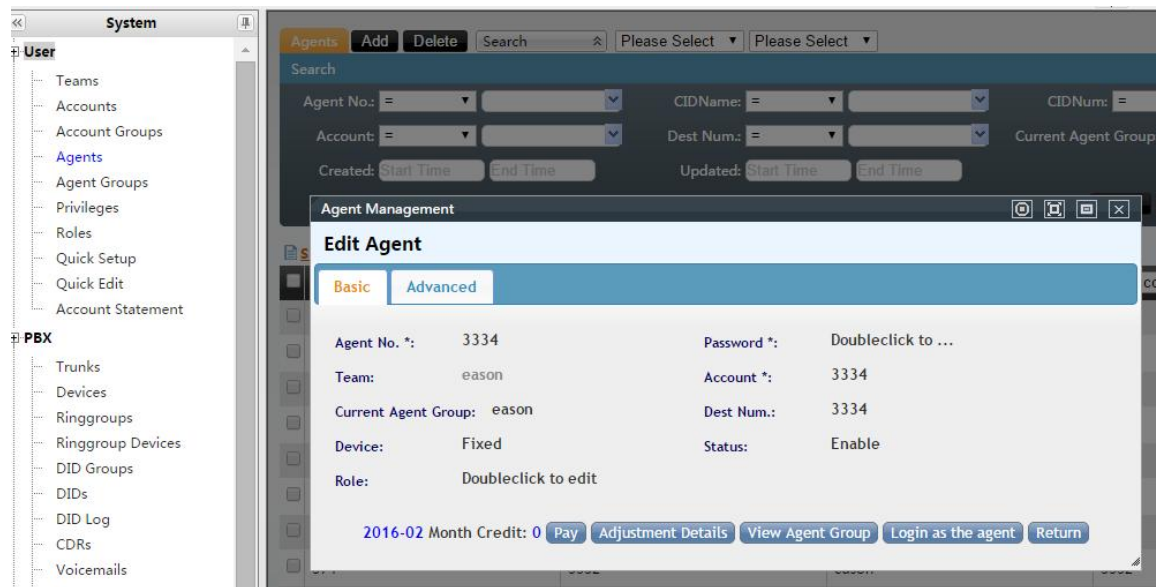
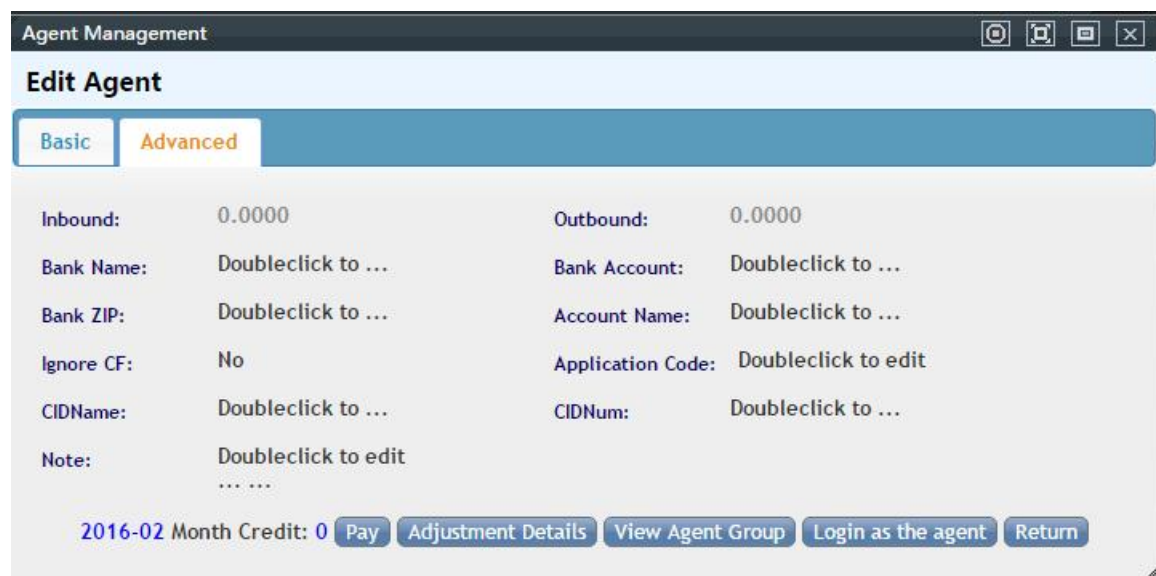
•CID Num:

•Note:

When you finished this step, click "Save" button and a new agent is completed.

Edit Agent

After the save is finished, you can see the newly added data in the agent management page, double-click the data can be edited to modify the operation.

Under the Advanced page, there are two more fields:

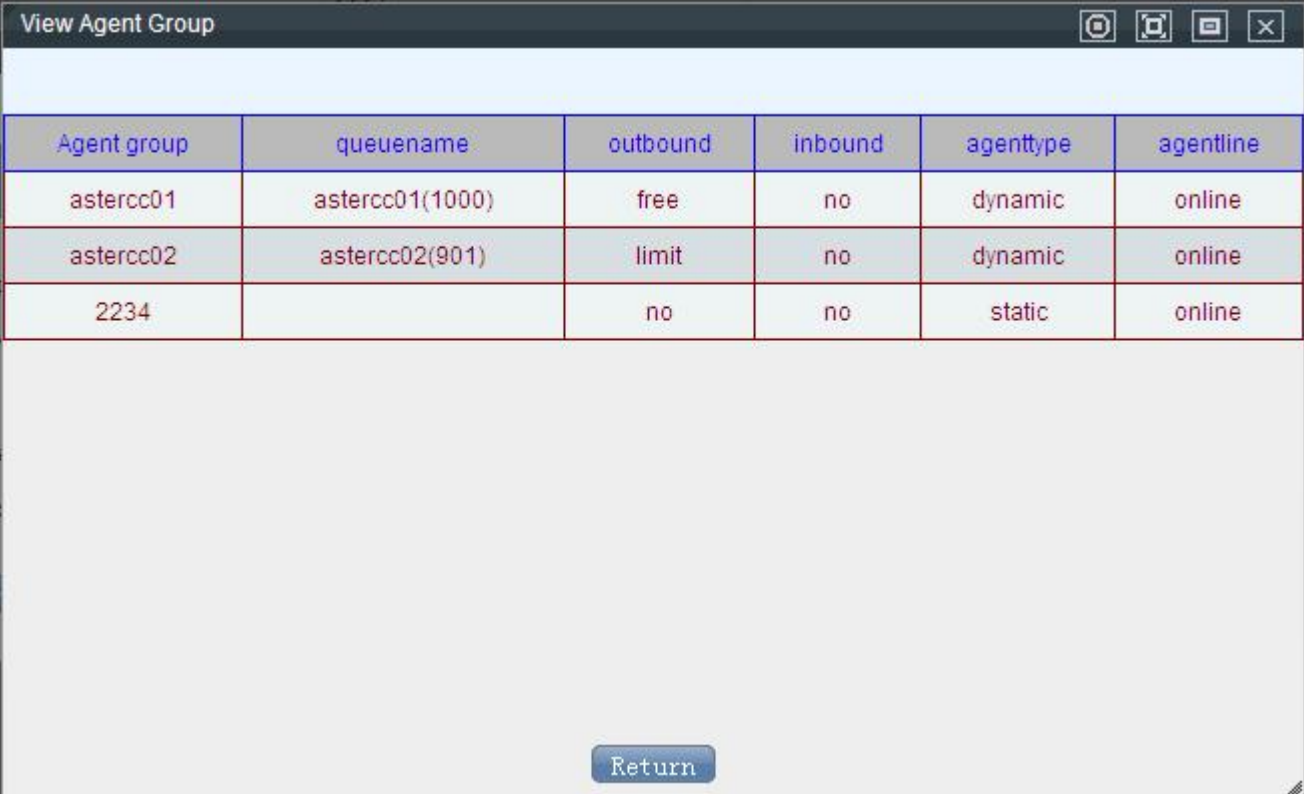
- **Inbound:** It can be viewed only and calculates the inbound fee of this agent.(Please refer to Rate->Agent Rates);
- **Outbound:** It can be viewed only and calculates the outbound fee of this agent.(Please refer to Rate->Customer Rate);

To the edit page button:

Pay: Click on this button, the system will pay the money showing beside the button to this agent.

Adjustment Details: Click on this button will pop-up financial statistics → agent accounting log page. It is used to view the agent's financial statistics;

View Agent Group: Click it will pop up the agent group;



The screenshot shows a window titled "View Agent Group" with a table containing the following data:

Agent group	queuename	outbound	inbound	agenttype	agentline
astercc01	astercc01(1000)	free	no	dynamic	online
astercc02	astercc02(901)	limit	no	dynamic	online
2234		no	no	static	online

Below the table is a large empty area and a "Return" button at the bottom center.

Login as Agent: Click it will load the agent's desk .

1.6 Agent Groups

On the left menu, please click Users → Agent Groups to open the agent group management page. In the real cases, an agent cannot handle one job alone, so we make an agent group as a unit. We put agents with the same job to one group, and one agent can belong to many groups.

Agent Groups Add Delete Search

Search: Name: [] Notes: [] Portal: [] Queue: [] Transferout: [Please Select] Work Way: [Please Select] Open Virtual Office Ta: [Please Select] Auto Pause: [Please Select] Media Attr: [Please Select] Updated: Start Time End Time [] [Reset] [Search] [Export]

Show Data | Trash | Unselected Queue

ID	Team	Agents Num.	Team
73	andy测试	2	andy测试
72	andy测试	3	andy测试
71	eason	5	eason
70	GMS	4	GMS
69	UCServer	5	UCServer
10	UCServer	1	UCServer
8	UCServer	0	UCServer
7	UCServer	6	UCServer
5	UCServer	4	UCServer

Listed 1 - 9 Records, Total 9 Records, Total 1 Page Jump To []

Add agent group

Click Add

Agent Group Management

Add Agent Group

Basic Advanced

Name*: [] Team: UCServer

Agents in group: Add Agent Queue: Please Select

Portal: Default Login Information: No

Work Way: Self-selection Outbound: Allowed

CF external: Yes Shift Type: Group Admin

Current Application Type: Campaign Current Application: Please Select

ACW: OFF Auto Stop ACW(s): []

Media Attr: Idle or Media Auto Pause: No

ConsultAgent Range: My Current Group Show queue status for agen No

Auto Answer Sip Header: Queue No Dialer No Click To Call Yes

Save Back

Mandatory fields

- **Name:** Name this group;
- **Team:** To which team this group belongs, and only the agents in that team can be added to the group;
- **Agents in group:** Click it to add agents to this group;

Optional fields

- **Agents in group:** 【Add agents】 to edit the agents in this group.

- **Queue:** Inbound group needs to set a queue, thus, the customers can call into this group. Similarly, the outbound group needs a queue too. We will give more information about queue in the next chapter.
- **Portal:** You can customize business interface shown on the agent working screen (it can tell the agent working time, left tasks, who has been recently contacted...), here enter the URL of this page. If leave this blank, then the agent's screen will show nothing. Here, the system offers a default pattern.
- **Login information:** Whether to send agent number, password or other login information to the other embedded CRM system.
- **Work way:**
 - All: All agents in the group can make inbound and outbound calls;
 - Self-selection: Agents within this group can select the working way for herself;
 - Dialin-only: Agents can only receive calls and cannot place calls;
 - Dialout-only: Agents can only make calls and cannot receive calls;
- **Outbound:** (Allowed, Not Allowed) If agent is allowed to make outbound calls (except for numbers in campaign), when it's Not Allowed, agent is only able to dial numbers in his contact history



If agent is working for a campaign, he could dial all the numbers in the campaign even it's "Not Allowed"

- **CF External:** Set to Yes if agents are allowed to consult an external number, Set to No if agents are only allowed to consult other agents
- **Shift Type**
 - Group Admin: The shift designed by the group administrator
 - Self: Do the shift personally
- **Current Application Type:**
- **Current Application:**
 - **ACW:** After call work, means when an agent finishes a call, it will automatically enter ACW status, while the group he belongs will not give him any call. The agent can deal with data during this time before he turns into idle status.
 - Off: it won't enter ACW automatically.
 - Ring ACW: regardless of whether get through, it enters ACW after ring.
 - Answered ACW: it only enters ACW when the call is answered.
 - Self-Selection: Agent could change his ACW policy
- **Auto Stop ACW(s):**
- **Media Attr:**
- **Auto Pause:** When Yes, if one agent missed a call, the agent will get paused automatically
- **Consult Agent Range:**

- **Show queue status for agent**
- **Auto Answer SIP Header**
- **Click To Call:**

Edit Agent group

- Double click to edit an agent group

Agent Groups Add Delete Search

Search

Agent Group Management

Edit Agent Group

Basic Advanced

Name*: eason Team: eason

Agents in group: [Edit Agent](#) Queue: eason(600)

Portal: Default Login Information: No

Work Way: Self-selection Outbound: Allowed

CF external: Yes Shift Type: Group Admin

Current Application Type: Customerservice Current Application: 呼入客户-e

ACW: OFF Auto Stop ACW(s): 0

Media Attr: Idle or Media Auto Pause: No

ConsultAgent Range: My Current Group Show queue status for agent: No

Auto Answer Sip Header: Queue No Dialer No Click To Call Yes

Type	ID	Priority
CustomerService	呼入客户-e	0

[Agents In Group](#) [Return](#)

Agent Management

Edit

Unassigned Agents

Select All

Add

Remove

All Agents

Select All

All set to: Please Select

Group has the following privileges by default



- get rid of error calls
- live monitor
- spy, barge-in, whisper ...
- predictive dialer controller (need campaign and dialer module)

Note:

After save the page, you will find that one more agents has been added. And there is a yellow bar on the top, means you need to apply the changes to the system.

Queues.conf has been changed, click to apply.

Click the bar, you will see "Reload Success", which means the setting is applied.

System Message

Reload Succeed

Back OK

1.7 Privileges

Privilege is used to set the privilege of every module for user. If change the setting here, it will affect the privilege in [Role](#).



Just systemadmin can add or edit the privilege

Click [User](#) -> [Privilege](#), open the page, it will show all the page in the list

Controller ▲▼	Category ▲▼
Receive SMS	Message
Customer Search	Customer Service
Customer Field	Customer
Contact Log	Customer
Organization Customer Tag	Customer
Logistics Import	E-Commerce
Customization Field	E-Commerce
History Order Details	E-Commerce
Order Details	E-Commerce
History Orders	E-Commerce

< << 1 2 3 4 5 >> > | Listed 1 - 10 Records, Total 199 Records, Total 20 Page Jump To

Click the page which you wanna edit, it can show the privilege of page and you can edit the privilege

Edit Accounts Page Privilege

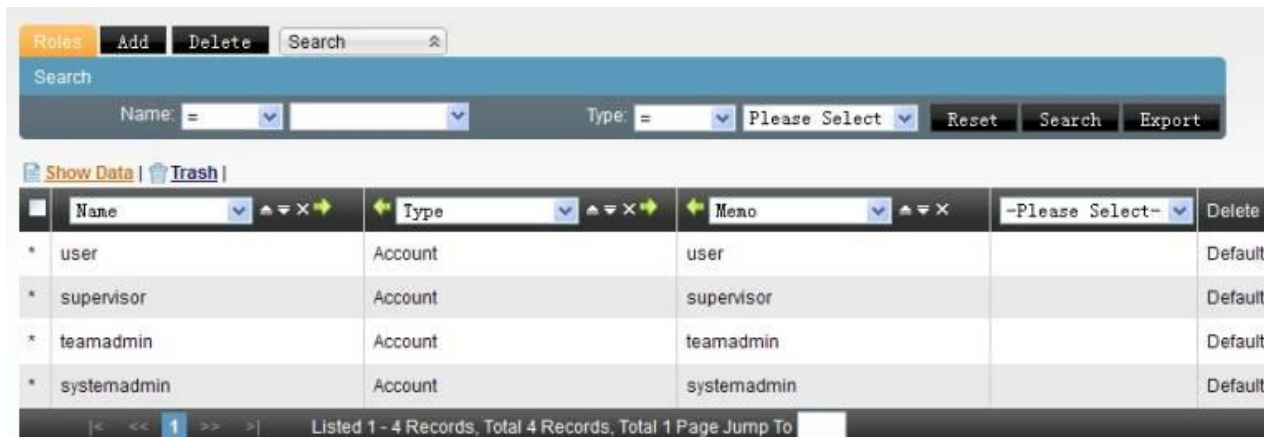
☒ Add ☒ Delete ☒ View ☒ Export ☒ Edit ☐ Truncate

OK Cancel

< << 16 17 18 19 20 >> > | Listed 191 - 199 Records, Total 199 Records, Total 20 Page Jump To

1.8 Role

Role is a collection of different privileges, we will assign different privileges to different roles so that we can manage user easily



Name	Type	Memo		Delete
* user	Account	user		Default
* supervisor	Account	supervisor		Default
* teamadmin	Account	teamadmin		Default
* systemadmin	Account	systemadmin		Default

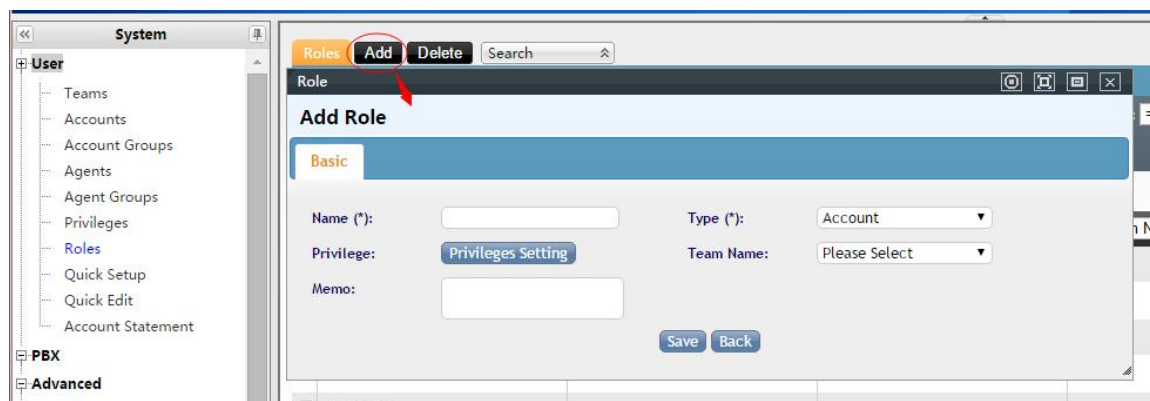
Listed 1 - 4 Records, Total 4 Records, Total 1 Page Jump To

By default, system provides 4 roles

- Account: Applicable to systemadmin (has all privileges and it's not editable)
- Agent: Applicable to agent (with editable privileges)

Add a role

Click <Add> to create a new role



Add Role

Basic

Name (*): Type (*):

Privilege: Team Name:

Memo:

Mandatory fields

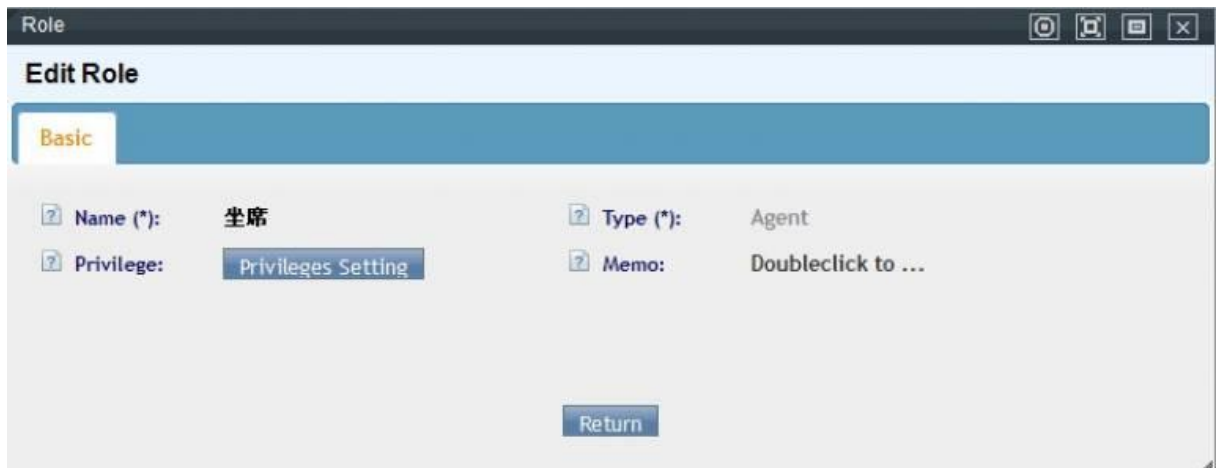
- **Name:** Give it a name to identify it.
- **Type:** Can be Account or agent.
- **Privilege:**



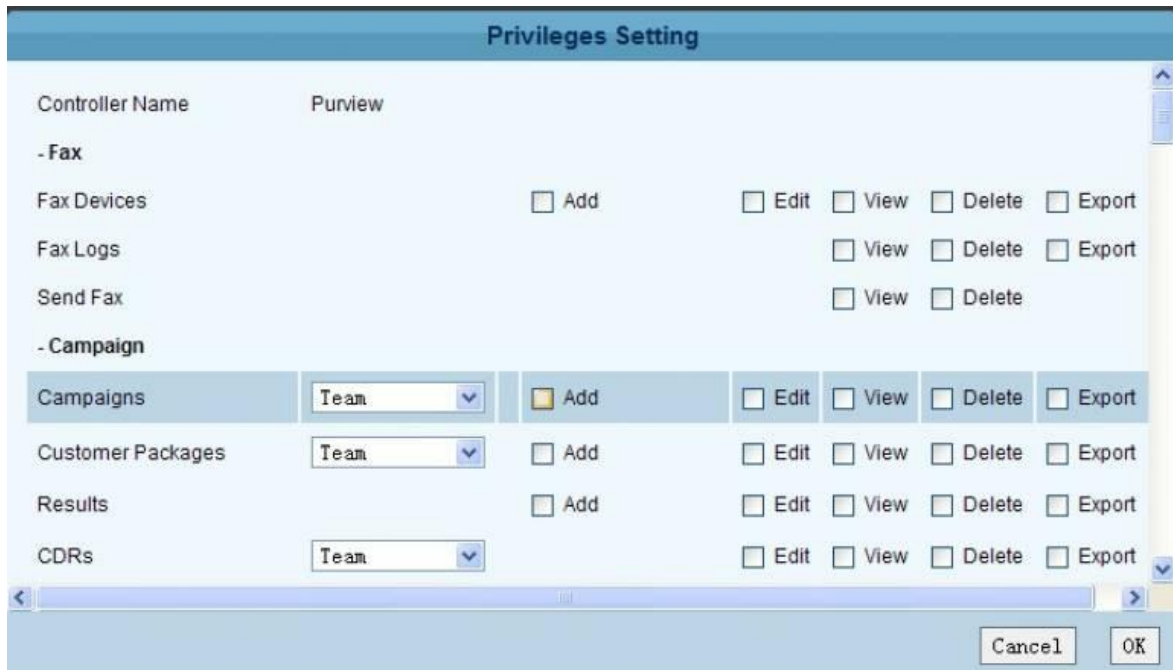
Click privilege to set privilege to the role, the range of the privilege here can only affect on his user type, for system, team or user himself

Edit a role

Double click the record, you can edit the role:



Click <**Privilege Setting**>, you can change the privilege of the role



Click the bold font, you can hide or show functions for each modules

1.9 Quick Start

First Login

- After installation, enter the server ip in your browser, such as: <http://192.168.1.110>, 192.168.1.110 is the IP of VINA-PBX server, the default system administrator user & password is admin and VINA-PBX.
- we suggest that user use FireFox or Chrome browser.



The image shows the UCServer login page. At the top is the UCServer logo with the tagline 'Data & Voice Solutions'. Below it is a login form with the text 'Please enter your Username and Password'. The form includes a 'Language' dropdown menu set to 'English', a 'Username' text box containing 'admin', and a 'Password' text box with masked characters. There is a 'Remember Me' checkbox and a 'login' button. Below the login form is a banner with the Chinese text '更好的联络体验' and the English text 'Better Contact Experience', accompanied by a photo of a smiling woman wearing a headset. At the bottom of the page, there is a disclaimer: 'Please use Microsoft Internet Explorer(>= 8.0) or Firefox(> 3.0) or Chrome for full functionality'. Below this is the company name '上海海品信息科技有限公司 荣誉出品', the current version 'Current Version: core-2.4-rc2', the server response time 'Server response Time: 394.86 ms.', and the copyright notice '©2007-2014 ucserver.org Inc. All Rights Reserved'.

Please enter your Username and Password

Language

Username

Password

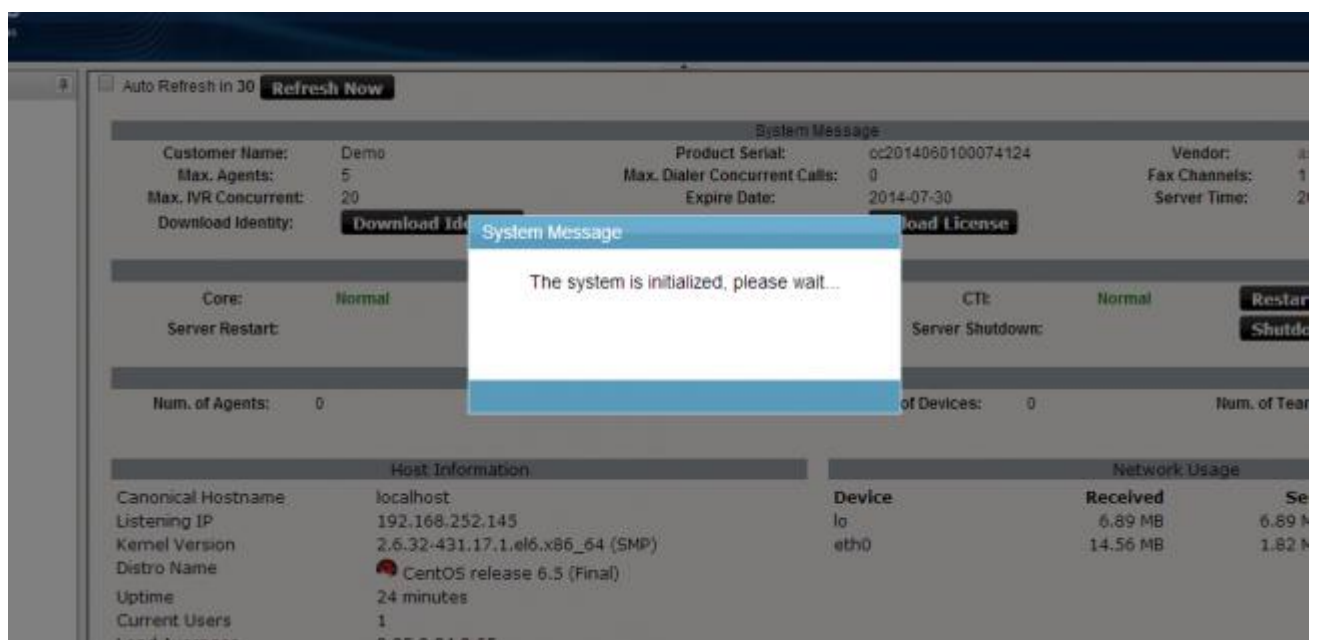
UC Server

☐ Remember Me

更好的联络体验
Better Contact Experience

Please use Microsoft Internet Explorer(>= 8.0) or Firefox(> 3.0) or Chrome for full functionality
上海海品信息科技有限公司 荣誉出品
Current Version: core-2.4-rc2 Server response Time: 394.86 ms.
©2007-2014 ucserver.org Inc. All Rights Reserved

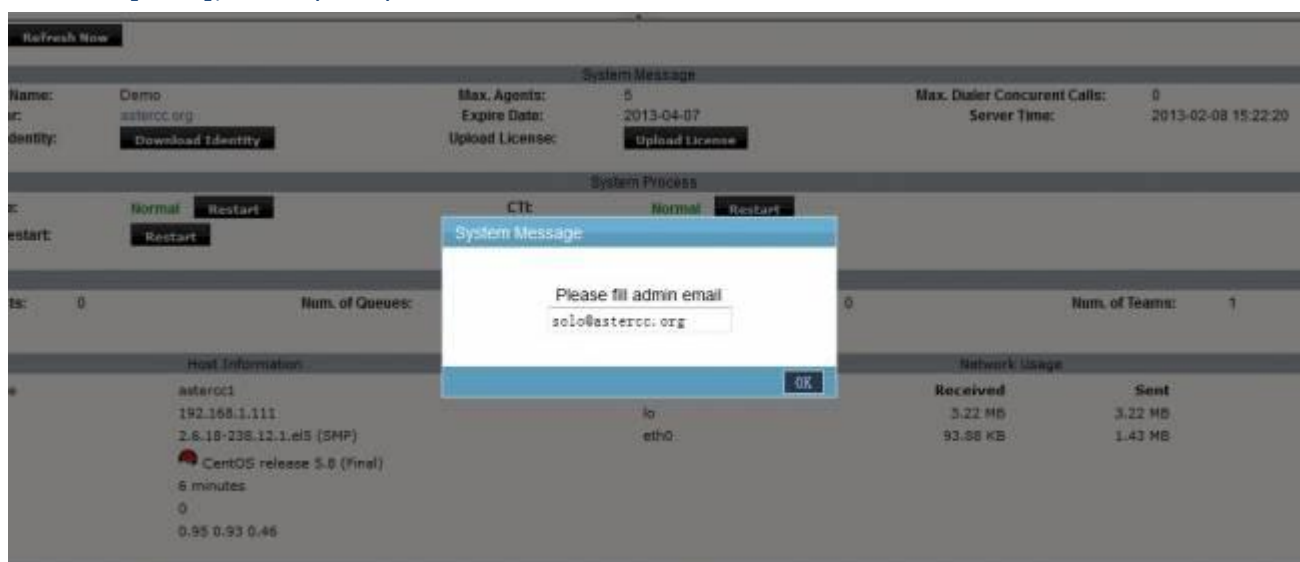
- When it's your first login, it will do initialization



- then it will prompt to select the default language



- Click [Next], it will prompt to enter a email box for administrator



Quick Setup

Quick Setup helps to generate accounts, devices and agents in bulk.

- Login as system admin or account admin.
- On the left menu, click [User] → [Quick Setup], go to quick setup page, we can add a batch of account, devices and agents.
- Select a team: Select a team for the new added accounts and agents.
- Account: Create New, the system will generate a random account for new added devices and agents. If selected an account, then the new added devices and agents will be based on this account.
- Select an Object

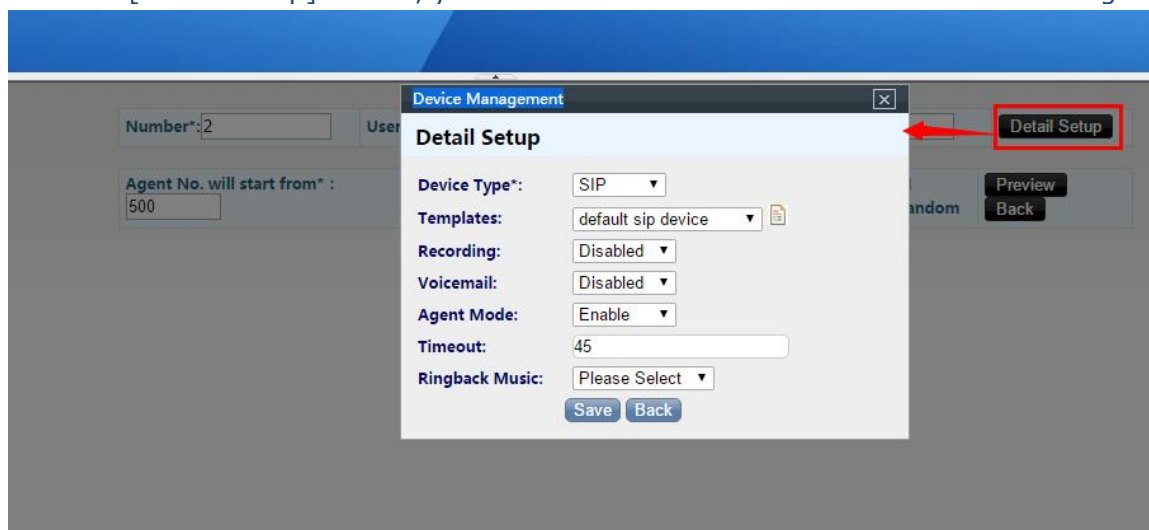
Device: Generate devices only;

Device&Agent: The system will generate agents and devices together

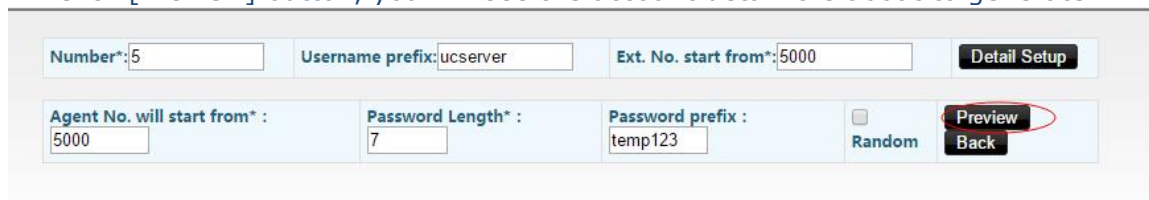
Agent: When agent is not using the system device (extension), please select this option. And you have to send the phone numbers for the agent under agent management.



- Click [Next] go to the setup page.
- Number: 5, we will add 5 accounts, devices and agents;
- Username prefix: astercc, all username of the accounts will start from astercc;
- Ext. No. Start from: 5000, all ext. number which we add this time will start from 5000
- Agent No. will start from: 5000, all agent no. which we add this time will start from 5000;
- Password Length: 7, the length of password will be 7;
- Password Prefix: temp23, the password prefix of account password and agent password, when the length of password prefix is same as password length, means it will use same password above.
- Click [Detail Setup] button, you will see the new added account's detail settings.



- Click [Preview] button, you will see the account detail it is about to generate.



Number*: 5
Username prefix: ucserver
Ext. No. start from*: 5000
Detail Setup

Agent No. will start from*: 5000
Password Length*: 7
Password prefix: temp123
Random
Preview
Back

Edit Password
Save

This team
can create 5 accounts, had created 5 accounts, need to create 5 accounts, there will be 5 account disabled
can create 5 agents, had created 5 agents, need to create 5 agents, there will be 5 agents disabled

Username(Password)	Extension(Password)	Agent No.(Password)	[Email]
For web ui login	For phone login	For agent check-in via phone	
ucserver0 temp123	5000 temp123	5000 temp123	
ucserver1 temp123	5001 temp123	5001 temp123	
ucserver2 temp123	5002 temp123	5002 temp123	
ucserver3	5003 temp123	5003 temp123	

- Click [Save] button, it will generate the accounts, devices and agents.
- A system message will popup to suggest you to download the csv file.

System Message

The data has been saved, do you want to download the csv file?

Back OK

- We will see a reload bar at the top, click the bar, the changes we made will be applied.

Devices.conf has been changed, click to apply.



System

1.10 Quick Edit

Quick edit is for editing objects in bulk.

Choose an object

On the left menu, click [User] → [Quick Edit], go to quick edit page. Choose the team and the edit object

Select a team :
UCServer ▼

Edit object :
Please Select ▼
Please Select
Device
Agent
Account

Next

Select a team :
UCServer ▼

Edit object :
Device ▼

Next

013161883679(2786)	> <	
1003(1003)		
13564139158(2674)		
13564471592(2676)		
13584921246(2767)		
13817540403(2679)		
13918788017(2672)		
15000262540(2671)		
15801815658(2677)		
15821148420(2673)		
15900593253(2670)		
15921756109(6688)		
18021248890(2566)		
18616201690(2675)		



You can use Shift button,
Control button and mouse to do multiselecting.

Edit Device

You can mass edit devices name, passwords, CID numbers etc. here. After finished the settings, please click Preview to check the changes. The system will show one device's settings as an example.

Device Name	Prefix <input type="text"/>	Ext. No.	Prefix <input type="text"/>	Secret	Prefix <input type="text" value="2"/>
	Suffix <input type="text"/>		Suffix <input type="text"/>		Suffix <input type="text" value="3"/>
	<input type="checkbox"/> Reset Password				
CIDNum	Prefix <input type="text"/>	CIDName	Prefix <input type="text"/>	Outbound CIDNum	Prefix <input type="text"/>
	Suffix <input type="text"/>		Suffix <input type="text"/>		Suffix <input type="text"/>
	<input type="checkbox"/> Delete				
Outbound CIDName	Prefix <input type="text"/>	DND Status	Please Select ▼		Account
	Suffix <input type="text"/>				Please Select ▼
	<input type="checkbox"/> Delete				
Device Status	Please Select ▼		Recording	Please Select ▼	
All Dial	Please Select ▼		Timeout	<input type="text"/>	
Agent Mode	Enable ▼		Ringback Music	Please Select ▼	
PBX Template	sip: Please Select ▼		iax2	Please Select ▼	
			dahdi	Please Select ▼	
<input type="button" value="Preview"/> <input type="button" value="Back"/>					

					<input type="button" value="Update"/>
Device Name	2578	Ext. No.	2578	Secret	23
CIDNum	2578	CIDName	2578	Outbound CIDNum	
Outbound CIDName		DND Status	No	Account	2800
Device Status	Enable	Recording	Disabled	VM Status	Disabled
All Dial	All	Timeout	45	Pickup Limit	Team
Agent Mode	All	Timeout	45	Pickup Limit	Team
Agent Mode	Enable	Ringback Music	Please Select		
PBX Template					

Edit Agent

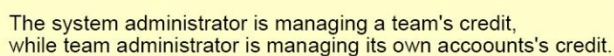
Agent No.	Prefix <input type="text"/>	Agent Password(Prefix+Agent No.+Suffix)	Prefix <input type="text" value="1"/>	Status	Please Select ▼
	Suffix <input type="text"/>		Suffix <input type="text" value="2"/>		
Is Device	Please Select ▼		Role	Please Select ▼	
<input type="button" value="Preview"/> <input type="button" value="Back"/>					

					<input type="button" value="Update"/>
Agent No.	2860	Agent Password	128602	Status	Enable
Is Device	Dynamic	Role	Not Modify		

Edit Account

- Prefix: Add prefix for the account
- Suffix: Add suffix for account
- Status:
 - Normal: All the accounts selected will be activated
 - Disable: All the accounts selected will be disable
- Monitor Force:
 - Enable: All the accounts will do recording automatically
 - Disable: All the accounts will not do recording automatically
- Limit Type:
 - No Limit
 - Post-paid
 - Prepaid
- Role: Change role to all accounts
- Send Bill: To receive bill or not

The account statement is for managing team and accounts' credit, including recharging and deducting.



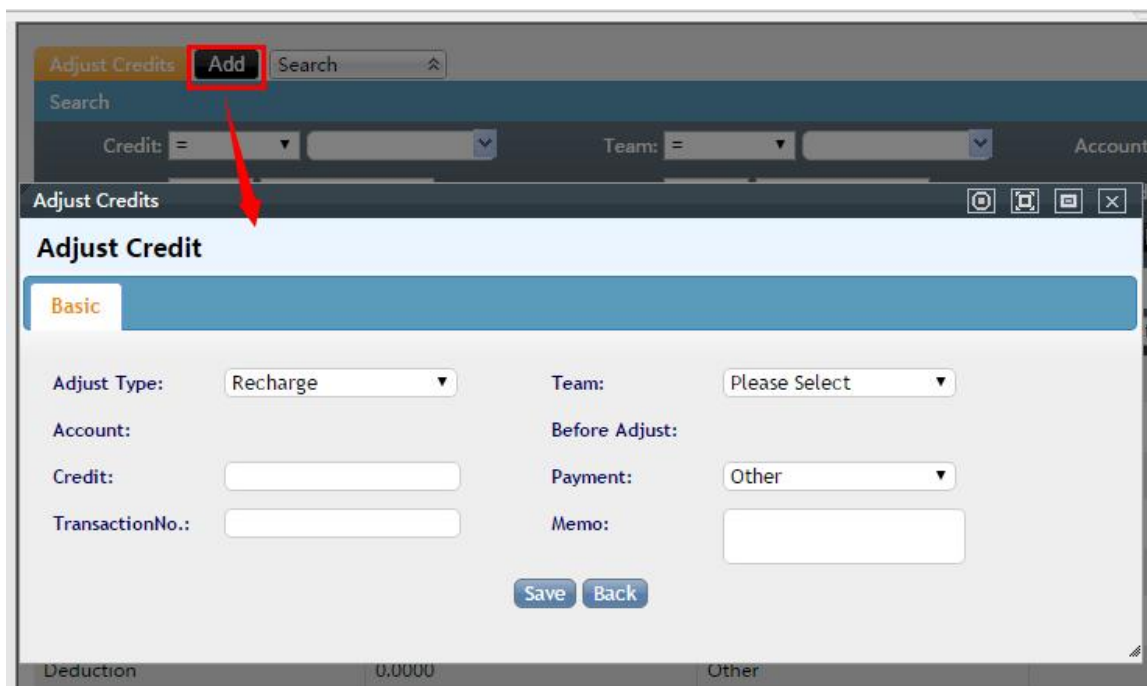
On the left menu, please click Users->Account Management to open the management page.

[illegible]

Add Account Credit

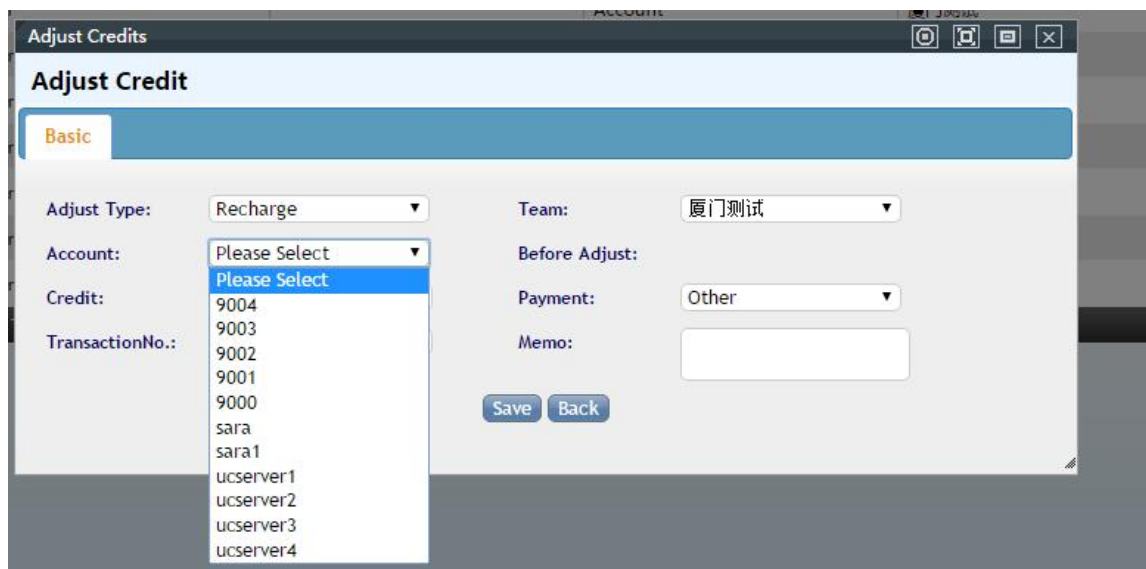
Click **【Add】** button, the following window will pop up.

If login as system administrator, you will see the following page:



The system administrator can recharge or deduce the team's credit here.

② Login as team administrator, you will see the following page:



Mandatory fields

- **Adjust Type :**
 - **【Recharge】** The administrator recharge for its team or accounts, its credit will get smaller accordingly.
 - **【Deduction】** The administrator reduces credit from its team or accounts, its credit will get more accordingly.

- **Team:**
 - If login as system administrator, choose a team, then adjust its credit.
- If login as team administrator, it will show the team name.
- **Credit** : Adjust the credit
- **Payment:** Other, credit card, Paypal, Wire Transfer, Cash

Optional Fields

- **Account** : It will be editable if login as team administrator
- **Before Adjust** :
 - If login as system administrator, it will show the team's left credit
 - If login as team administrator, it will show the device's left credit
- **Memo** : Leave note for this adjustment

When you finished the settings, click "Save" button and a new Account Statement is completed. You can find a new data on the account statement page. If you don't want to save it, just click "Return" or close the window.

Note



Double click to check and modify is invalid under Account Statement page

2. PBX

2.1 Trunk

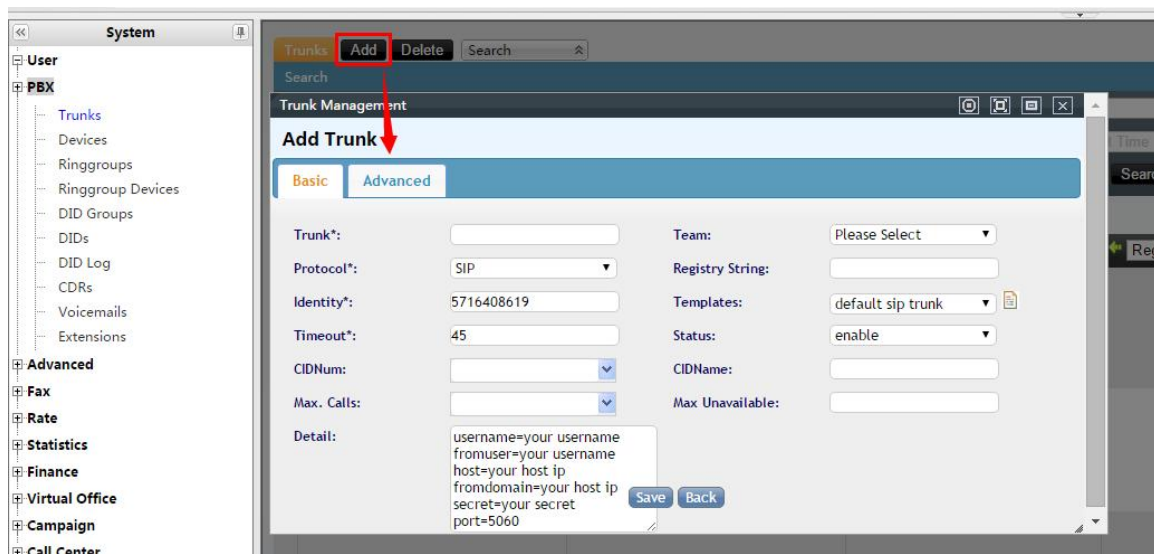
A trunk is a route connecting the local telephone network and other telephone network (mainly the traditional PSTN network or other IP PBX system).

Trunks can be cataloged by the transmission media

- Internet trunk (SIP, IAX)
- Analog trunk (FXO)
- Digital trunk (E1 PRI)

Add a trunk

On the left menu, click **[PBX]** → **[Trunk]** → **[Add]** to open the trunk add page.



Ma

natory fields

- **Trunk** Set the name for the trunk for identification.
- **Team** Selece a team to which this trunk belongs. And after setting, this trunk can only be used in this team. If you do not assign this trunk a team, then all teams can use this trunk.
- **Protocol** Choose a protocol for this trunk.
- **Registry string** When you choose SIP or IAX, and in order to receive the calls from this trunk, you need to enter a registry string of the trunk sometime. Standard format:**username:password@voip.sonicwell.com:5060**
- **Identity** The only identity. The system would automatically generate a string of number as the identity. And for some internet trunks, the identity needs to be the same as the trunk name, thus, manual adaption is needed here.
- **Time out** When the call attempt exceeds this tim and still not gets conneted, it is considered a failure.
- **Status** Whether to enable this trunk

Optional fields

- **Templates:** Select a trunk for this trunk. The use of templates makes it easy to manage the internet trunks of the same type.
- **CID Num:** The CID number displays
- **CID name:** CID name displays (now only supports some trunks).
- **Details:** enter the configuration parameter of the trunk
- **Max Unavailable:** When the call failed constantly via the trunk, it will be disabled, it often applies to predictive dialer, using a trunk group, this could avoid whole campaign fail due to one trunk problem. 0 means this feature is disabled.

- **Max calls:** the max. concurrent calls allowed in the trunk

Advanced

The screenshot shows a web application window titled "Trunk Management" with a sub-header "Add Trunk". Below the header are two tabs: "Basic" and "Advanced", with "Advanced" being the active tab. The form contains several fields and dropdown menus arranged in two columns. The left column includes "Enforce Use Rate:" (dropdown set to "No"), "Int gain:" (dropdown set to "0"), "Custom Dial String:" (text input), "Cluster Trunk host:" (text input), "Whitelist:" (text input), and "Sip Header:" (text input). The right column includes "Always use trunk CID:" (dropdown set to "No"), "Ext gain:" (dropdown set to "0"), "Cluster Trunk:" (dropdown set to "No"), "Memo:" (text input), and "Blacklist:" (text input). At the bottom of the form are two buttons: "Save" and "Back".

- **Enforce use rate:** When system try make a call via this trunk, it would try match a device rate of the trunk. If you use the enforce rate, you can't dial out if it failed to match a rate, if this option is not set to yes, system can dial out event no device rate match.
- **Always use trunk CID:** If you choose "yes" here, then no matter what number has been set outside this page, the number set in this trunk will be used.
- **Cluster trunk** If you use this system and other systems together, choose "yes"
- **Cluster trunk host** enter the cluster trunk host address.
- **Black list:** Numbers in this list cannot be placed or received.
- **Black list:** If you enter numbers in this list, then only the number in this list can be placed or received.
- **Detail:** For discriptive information, like its purpose etc.

Edit trunk

Double click the item to open the edit page.

Trunk Management

Edit Trunk

Basic | **Advanced**

Trunk*: eason-sip Team: eason

Protocol*: sip Registry String: 02151191685:334...

Identity*: 3594788555 Templates: default sip trunk

Timeout*: 45 Status: enable

CIDNum: Doubleclick to edit CIDName: Doubleclick to ...

Max. Calls: Unlimited Failed Response: Doubleclick to ...

Max Unavailable: 0 Detail: username=021511...

Type	ID	Priority
------	----	----------

[Add Customer Rate](#) [Edit Rule](#) [Return](#)

Click [Edit rule] to open the trunk rule editor

Trunk Management

Edit Trunk

Basic | **Advanced**

Trunk*: eason-sip

Protocol*: sip

Identity*: 3594788555

Timeout*: 45

CIDNum: Doubleclick to edit

Max. Calls: Unlimited

Max Unavailable: 0

Rules

Edit Rule

Basic

Trunk Name: eason-sip object: Dst Number

Rule Status: Enable Match Type: Callee Prefix

Ori. Prefix: default Ori. Length: 0

Remove Prefix: Add Prefix:

[OK](#) [Return](#)

Type	ID	Priority
------	----	----------

[Add Customer Rate](#) [Edit Rule](#) [Return](#)

When a number enters the trunk, and it will match by the rule you set, and if it matches, the prefix will be deleted or added by you rules.

Rule Status: Including Enable, Disable, Refuse

Object: Including Dst Number, Callerid Number, Callerid Name

Ori prefix: What kind of number with this prefix will match. IF you enter 0411, then the number start with 0411 will be matching this rule and execute by the rules.

Ori length: the length of the number that matches.

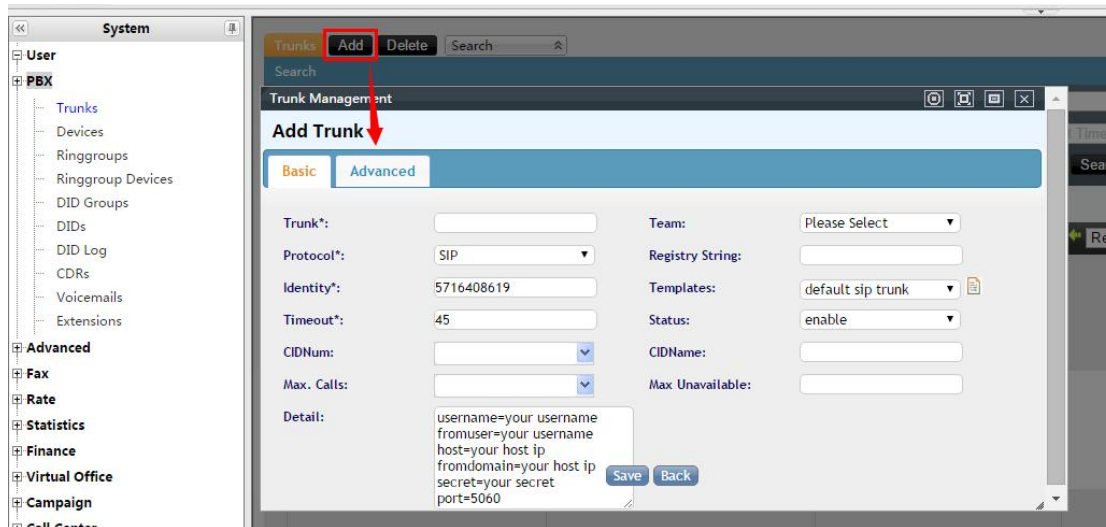
Remove prefix: When the number matches, the prefix you entered will be removed.

Add prefix: When the number matches, the prefix you entered will be added.

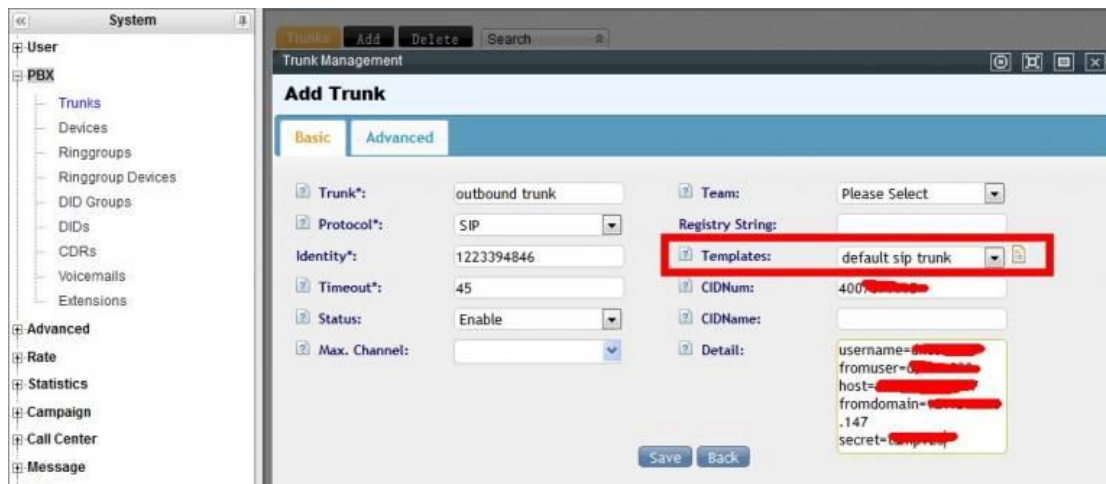
Click [save] after finishing the rule set, and the new information will be displayed on the table on the bottom.

Adding SIP Trunk

- On the leftmenu,click [PBX] →[Trunk],open the Trunk page,click the [Add] button to open the add page,as follow:



- fill the trunk information
- When use the “default sip trunk” template,is the typical sip trunk settings,like this:
- username=your username
- fromuser=your username
- host=your host ip
- fromdomain=your host ip
- secret=your secret
- port=5060




some providers require the trunk identity is the same with the username

trunk premeter,refer to [Trunk](#)



Use the templates can help you quickly to set the trunk details and manage it easily



Please ask the provider for CIDNum and CIDName whether need to set the specified number

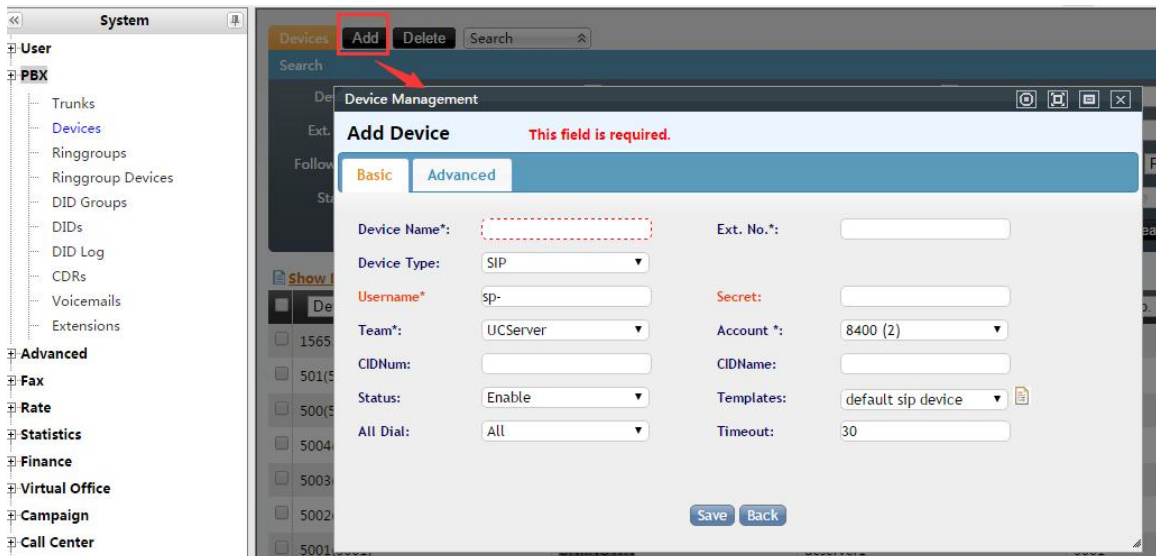
2.2 Devices

This is used to manage all devices in the system, devices including:

- (DAHDI)
 - SIP, IAX2, MGCP via internet
 - or any telephone (outside line) which can also be one device of the system.
- Module function:** Add and set the device parameters, and make sure the devices are connected to the system.

Add device

On the left menu, Click[**PBX**]→ [**Devices**], click[**Add**]to open the device add page.



Required fields

- **Device Name:** The name of the device, you can enter anyname;
- **Ext. No.:** The internal number of the extension, used for internal calls. Inside a team, same number cannot be repeated.
- **Username:** The system automatically this username automatically, the format is team identification- ext. no., e.g., astercc-5000 (when configuring the softphone, in account and authentication username shall enter this)
- **Secret:** Enter a password for the device. (when configuring the softphone, enter this in the password.)
- **Team:** Select a team the device belongs to

- **Account:** Choose the account the the device is under, the number in the bracket is the number of the already existing devices.
- **Device type:** Four types:(SIP, IAX2, MGCP,DADHI and outside line devices)



Outside line devices can only answer calls inside the system, but cannot place calls

- **Status:** Whether to enable this device
- **Template:** The parameter template the device uses. Using template can help us batch adjust the parameter of devices quickly;
- **Allow dial:** Whether allow the device to dial the number outside the system.

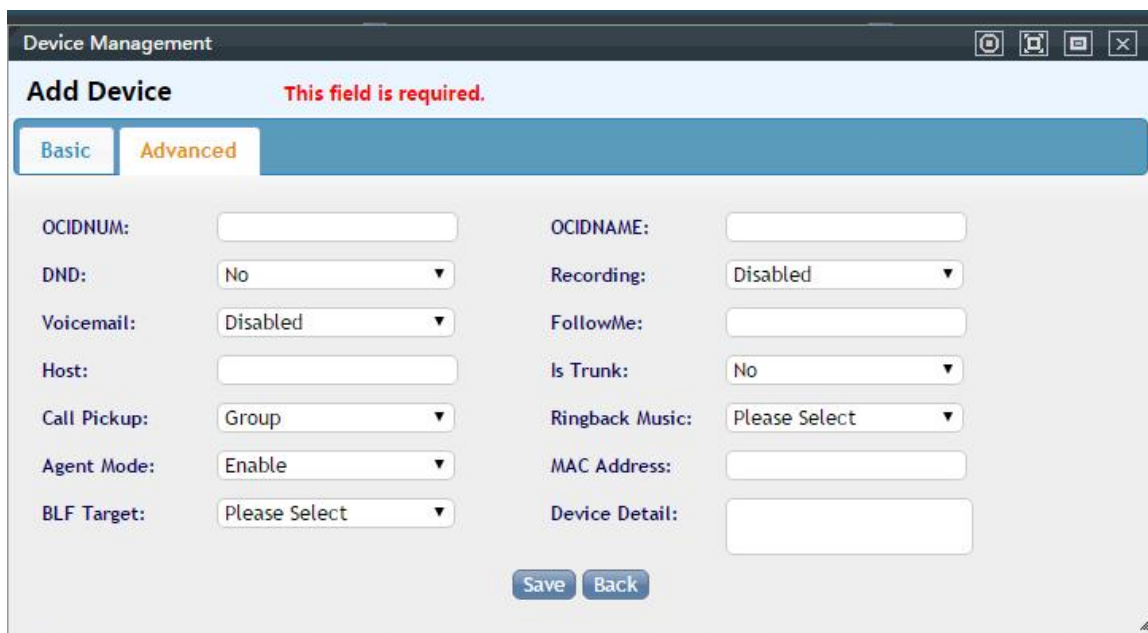


When you choose external in the device type, the system will show the field requiring external number to be entered

Optional fields

- **CID number:** set the CID number (internal calls)
- **CID name:** set the CID name (internal calls, only IP phones support CID name)
- **Time out:** calling a device and it is not answered within this time, then the call is failed.

Advanced



Device Management

Add Device This field is required.

Basic Advanced

OCIDNUM:

OCIDNAME:

DND:

Recording:

Voicemail:

FollowMe:

Host:

Is Trunk:

Call Pickup:

Ringback Music:

Agent Mode:

MAC Address:

BLF Target:

Device Detail:

Save Back

- **OCID NUM:** Set the OCID number (outside calls);
- **OCID Name:** Set the OCID name (outside lines, only support IP lines);

- **DND:** Whether to enable the DND function of this device;
- **Recording:** Whether to enable the recording function of this device;
- **Voice mail:** Whether to enable the voice mail function;
- **voicemail box password:** Put a pin to access your voice mail box(when [Voice Mail] enable, it will show up)
- **Voicemail Email:** The voice mail will be sent to this email box(when [Voice Mail] enable, it will show up)
- **Host:** When you set this, only the devices of this address can register (limited to internet devices);
- **Is Trunk:** Whether to assign an outbound trunk to this device;
- **Call pick:** The range of call picks
- **Group** Agents can only pick calls from the same group;
- **Team** Agents can pick the calls from the same team.
- **Ringback music:** The music the customer hear when he calls in and waits to be picked up.
- **Device detail:** for some customised configuration.
- **Agent Mode:**
- **MAC Address:**
- **BLF Target**

Edit the device

In the device list, double click a device to open the edit window:

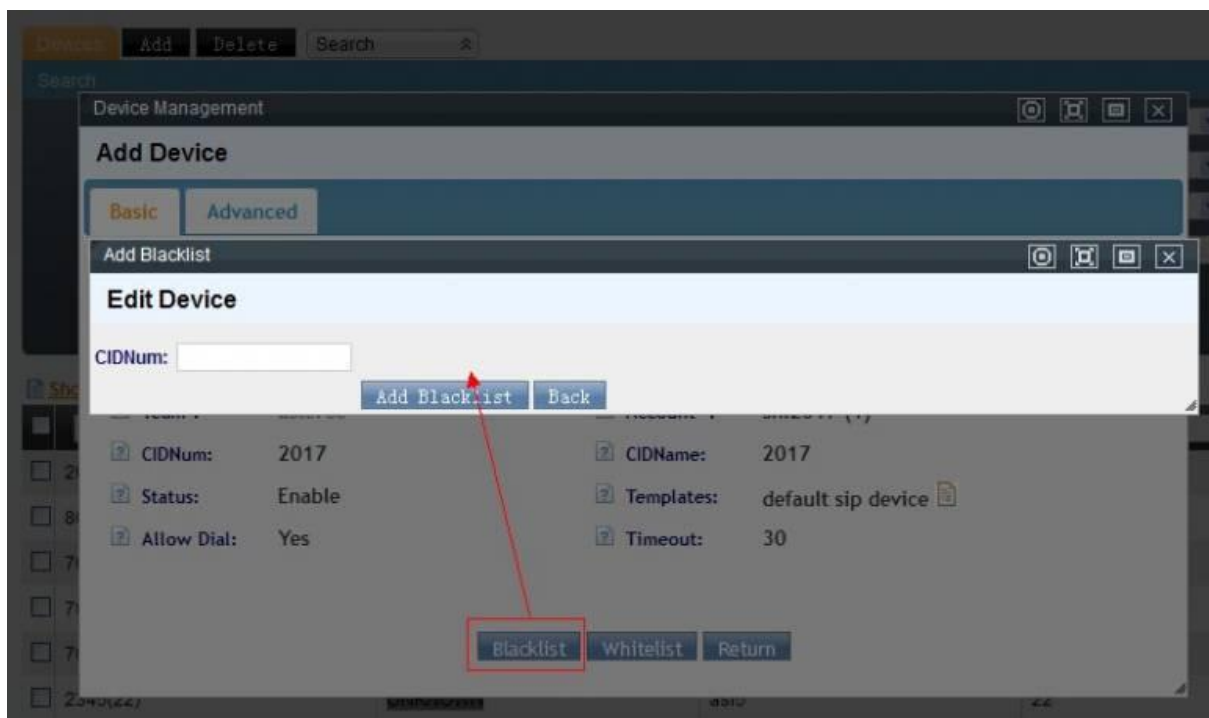
Device Management

Add Device

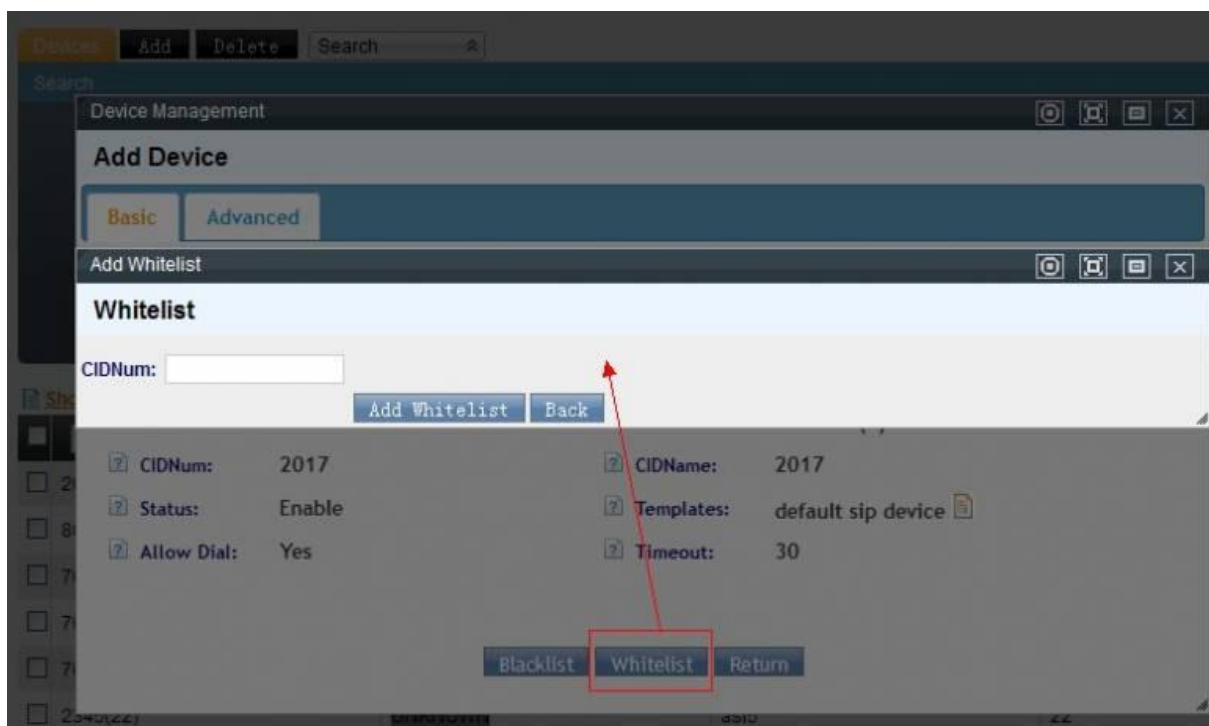
Basic Advanced

Device Name*:	15651832265	Ext. No.*:	2777
Device Type:	external	ExternalNumber:	15651832265
Team*:	UCServer	Account *:	2877 (2)
CIDNum:	2777	CIDName:	15651832265
Status:	Enable	Templates:	
All Dial:	All	Timeout:	30

Blacklist Whitelist Return



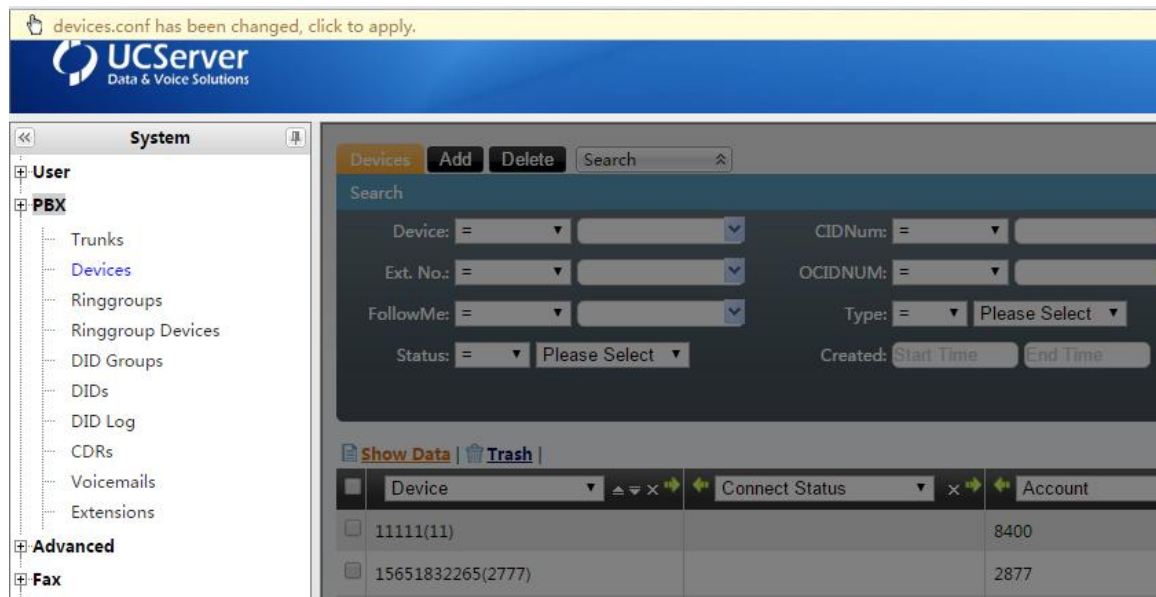
- Black list: set a list of numbers which are not able to get through to this device.



- White list: set a list of numbers and only the numbers on the list can call in.
- Click[Advanced]→[Blacklist]and[Advanced]→[Whitelist],also can open the blacklist/whitelist page

Tips

After saving the device information, a yellow banner shows up and asks for apply. Click it and make the set take effect.



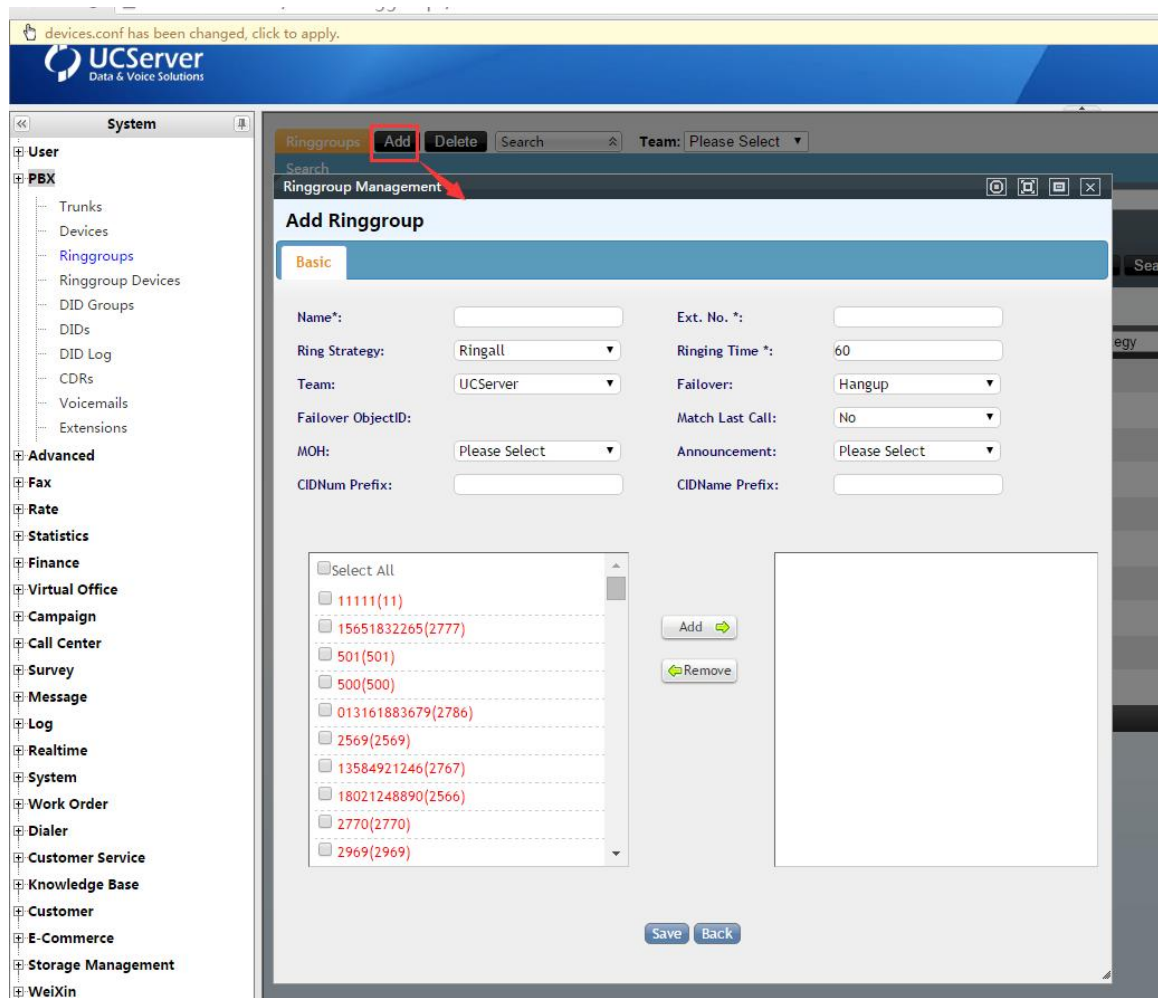
2.3 Ring Group

A ring group take a group of devices as one object. Firstly the ring group receives a request (e.g., extensions only dial inside numbers within the group, or switch to the ring group through IVR), then the ring group will ring one or more devices at the same time or one after another.

The ring group and the queue work mostly the same way, but ring group does not need to sign in.

Add ring group

On the left menu, click[[PBX](#)][→](#) [[Ringgroup](#)], click [[Add](#)] to open the ring group add page.



required fields

- **Name:** Name this ring group.
- **Ext. No.:** Extensions can dial this number to ring this ring group.
- **Ring strategy:**
 - Ring all: all devices ring when calls get in.
 - Hunt: Ring ext. one by one
 - Hunt-next: Let's say we have three ext. :1001,1002,1003. It will ring 1001 first, then next call it will run 1002, then 1003, if the ext. didn't answer, it will ring next ext.
 - Memory Hunt: Let's say we have three ext. :1001,1002,1003. First it will ring 1001, if no answer, it will ring 1001 and 1002, then 1001, 1002, 1003 together.
 - First available: Memory Hunt: only ring available ext.
- **Ringing time:** How long the ring lasts.
- **Team:** Which team this ring group belongs to.
- **Match last call:** Whether to call the extension that has the most recent call.

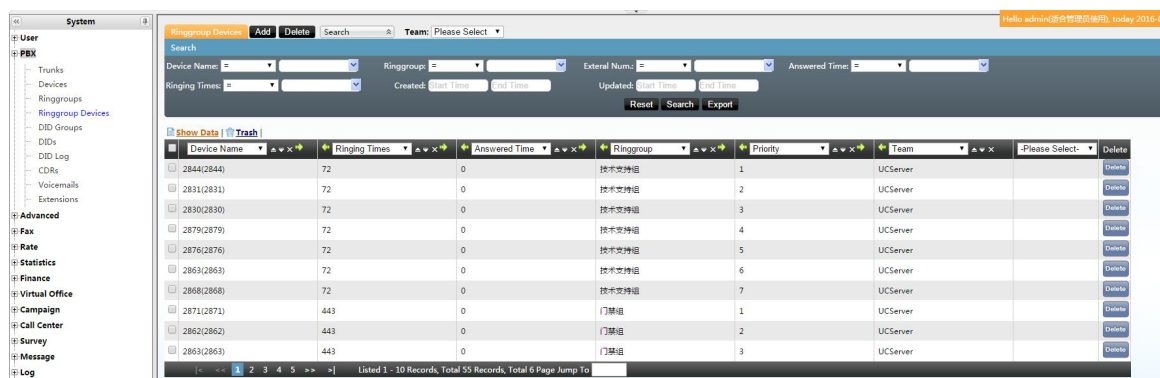
On the left list on the bottom you can see all the devices in the team, tick and click [Add]. The ring devices on the right are about to join this group, and the order of the devices on the right is the order it rings.

Optional fields

- **Announcement:** Select the type of the sound file in order to be found easily.
- **MOH:** Music on hold
- **CID Num Prefix:** Number only. When ring group calls devices, the calling number will be added with this prefix.
- **CID Name Prefix:** When ring group calls devices, the calling name will be added with this prefix.
- **Failover:** If failover, go to
(Hangup,Announce,IVR,Queue,Extension,Ringgroup,VoiceMail,Busy)

2.4 Ringgroup Devices

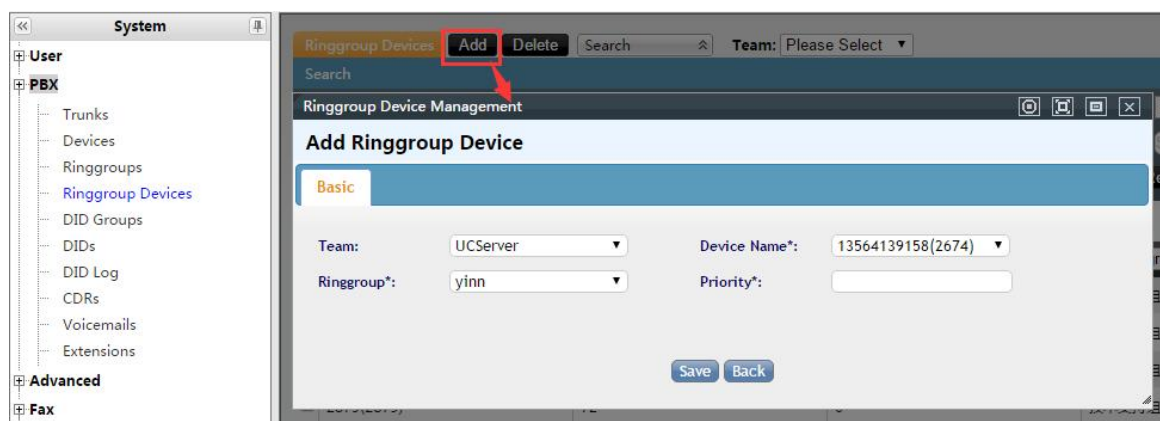
Ring group is used to manage and adjust the device within the ring group. This page shows the number of outbound and inbound call of devices in different ring groups.



Device Name	Ringing Times	Answered Time	Ringgroup	Priority	Team	Please Select	Delete
2844(2844)	72	0	技术支持组	1	UCServer		Delete
2831(2831)	72	0	技术支持组	2	UCServer		Delete
2830(2830)	72	0	技术支持组	3	UCServer		Delete
2879(2879)	72	0	技术支持组	4	UCServer		Delete
2876(2876)	72	0	技术支持组	5	UCServer		Delete
2863(2863)	72	0	技术支持组	6	UCServer		Delete
2868(2868)	72	0	技术支持组	7	UCServer		Delete
2871(2871)	443	0	门禁组	1	UCServer		Delete
2862(2862)	443	0	门禁组	2	UCServer		Delete
2863(2863)	443	0	门禁组	3	UCServer		Delete

Add ring group device

In the left menu [PBX] → [Ringgroup device], click [Add] to open the ring group device add page.



Ringgroup Device Management

Add Ringgroup Device

Basic

Team: Device Name*:

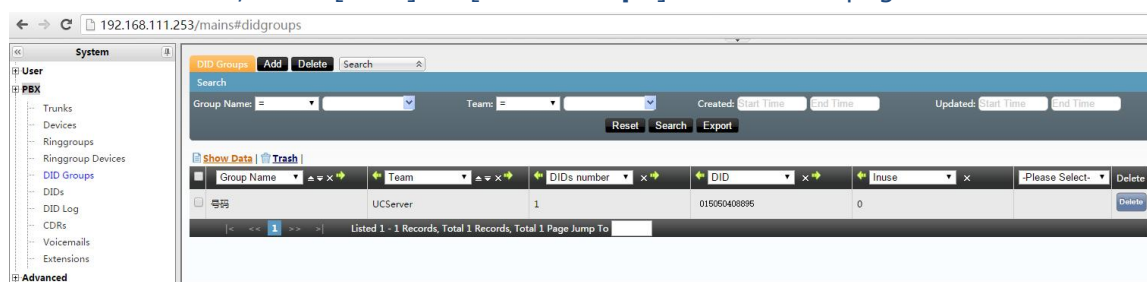
Ringgroup*: Priority*:

Required fields

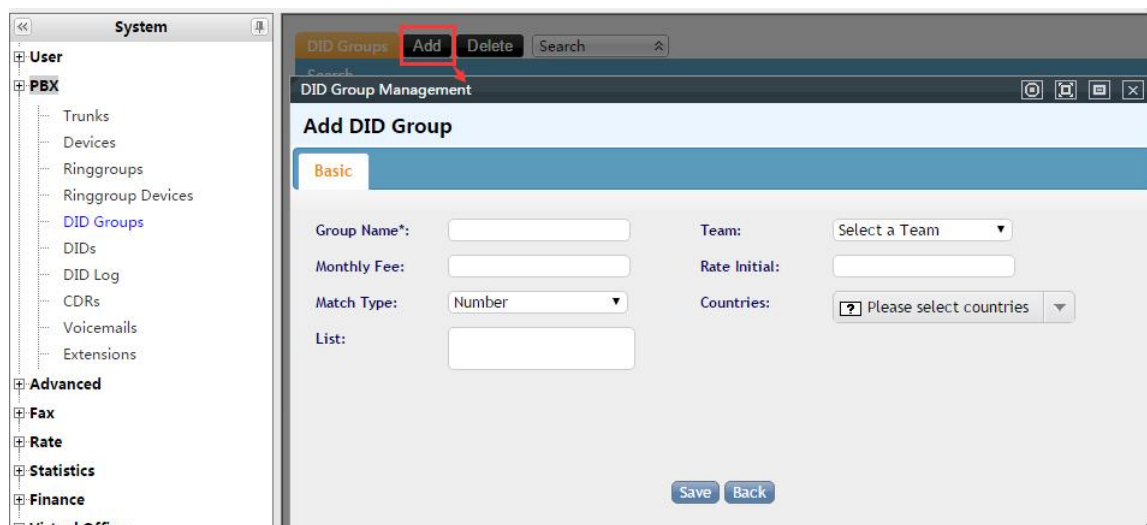
- **Team:** Select the team which the device to be set belongs to
- **Device name:** Choose a device in this team
- **Ringgroup:** Choose a group you want the device to be assigned to
- **Priority:** Set the priority level of the ring group, enter 0-9, the larger the number, the higher the priority. (If they are of the same priority, the system will sequence them by the order they were added.)

2.5 DID Group

On the left menu, select[PBX]→ [DID Groups] to enter the page below.



Module Function: To build or edit a DID group, and to gather the DIDs of the same type. Click[Add]to open the DID group add page.



Group name:Set a name for this DID group to identity its function and role.

Team: Which team this group belongs to

Monthly Fee:

Rate Initial:

Match type: either *number* match or *prefix* match.

Countries:

List: set the matching number or prefix in this team, distinguish them by line-feeds.

Click [Save]to save the data. In the DID group page you can see the newly added data.

Double click the data to re-open the editing page to edit the data.

DID Group Management

Edit DID Group

Basic

Group Name*: 号码 Team: UCTeam

Monthly Fee: 0.0000 Rate Initial: 0.0000

Match Type: Number Countries: [?] Please select countries ▼

List: 015050408895

Type	ID	Priority
------	----	----------

[Detail](#) [DIDs in group](#) [Return](#)

Click [Detail](#) to open the following window

DID Group Management

Edit DID Group

Route Management

view Route

Route Name	Detail
ppppp	View Detail

[Return](#)

964502

Type	ID	Priority
------	----	----------

[Detail](#) [DIDs in group](#) [Return](#)

This page shows all the routes about this DID group. Click each **[Detail]** to switch to the incoming route page, this can be used for searching DID in the incoming route page.

Click [DIDs in group](#) and the browser will pop up a new tab to show all the DIDs under this group, this can be used for searching DID in the DID page.

2.6 DIDs

DID, direct inward dial, is the number that customers dial. The function of DID in the system is to make different incoming routes by recognising DID number. For example, it can directly call a device, a ring group, or enter an IVR or a queue.

Add DID

On the left menu, Click[**PBX**]→ [**DID**], entering the management page, and click[**Add**]to open the following window,

The screenshot shows the 'Add DID' form in the EQUINET VINA-PBX interface. The left sidebar has a tree view with 'PBX' expanded and 'DIDs' selected. The main window has a top bar with 'DID', 'Add', 'Delete', and 'Search' buttons. The 'Add DID' form is titled 'DID Management' and has a 'Basic' tab. It contains fields for DID Number*, Account, DID Group, Rate Initial Type, Monthly Fee, Supplier, Language, Team, Device Name, Status, Rate Initial, Cost, Countries, and DID Memo. A red arrow points to the 'Add' button in the top bar.

Required fields

- **DID Number:** Set a DID number.
- **Team:** Every DID number has to belong to a team.

Optional fields

- **Account:** Which account this DID number is using (after selecting, all of the devices under this account will be listed)
- **Device name:** In the account you have chosen, pick a device, and after that, when the DID is dialed, the system will automatically route the call to this device without the need of an extra route setting.
- **DID group:** Which group this DID is assigned to.
- **Status:** Whether to enable this DID.
- **Rate Initial Type:**
 - Rate Initial:
 - Monthly Fee:
 - Cost:
 - Supplier:
 - Countries:
 - Language:
- **DID memo:** To describe this DID number.

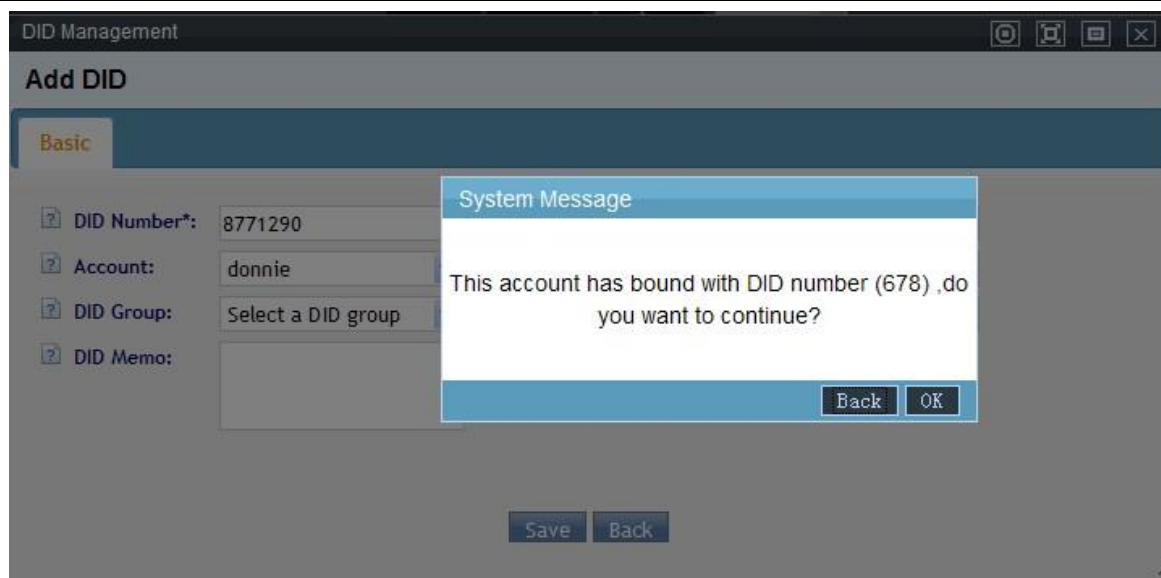


Putting DID under an account makes it convenient to bill the incoming calls

The screenshot shows the 'DID Management' interface. At the top, there are buttons for 'Add', 'Delete', and a 'Search' dropdown. Below this is a 'Search' section with filters for 'DID', 'Account', 'DID Group Name', 'Credby', 'Created' (with 'Start Time' and 'End Time' inputs), and 'Updated' (with 'Start Time' and 'End Time' inputs). There are 'Reset', 'Search', and 'Export' buttons, with 'Export' set to 'xls file'. Below the search section is a table with columns: 'DID', 'DID Group Name', 'Account', 'Team', and 'Memo'. The table contains one record with DID '87212990', DID Group Name 'ds', Account 'astercc', and Team 'astercc'. At the bottom, it says 'Listed 1 - 1 Records, Total 1 Records, Total 1 Page Jump To'.

- When the DID is assigned to an account, the system will automatically check whether other DID has been binded with this account. And different instructions will show up to avoid the mess that one account is binded with multiple DID.

The screenshot shows the 'Add DID' form in the 'DID Management' window. The form has a 'Basic' tab and fields for 'DID Number*', 'Account', 'DID Group', and 'DID Memo'. The 'DID Number*' field contains '8771290', 'Account' contains 'astercc0', and 'DID Group' is set to 'Select a DID group'. A 'System Message' dialog box is overlaid on the form, displaying the text 'This account has not been used'. The dialog has 'Back' and 'OK' buttons. At the bottom of the form, there are 'Save' and 'Back' buttons.

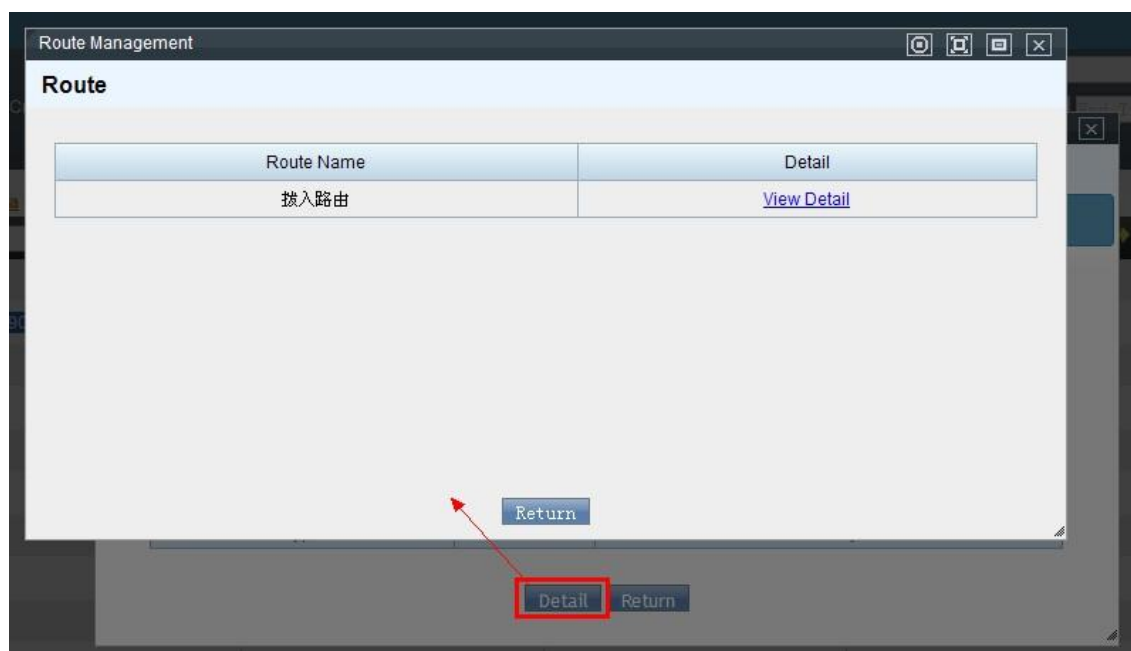


Edit DID

Double click the item to open the DID editing window.

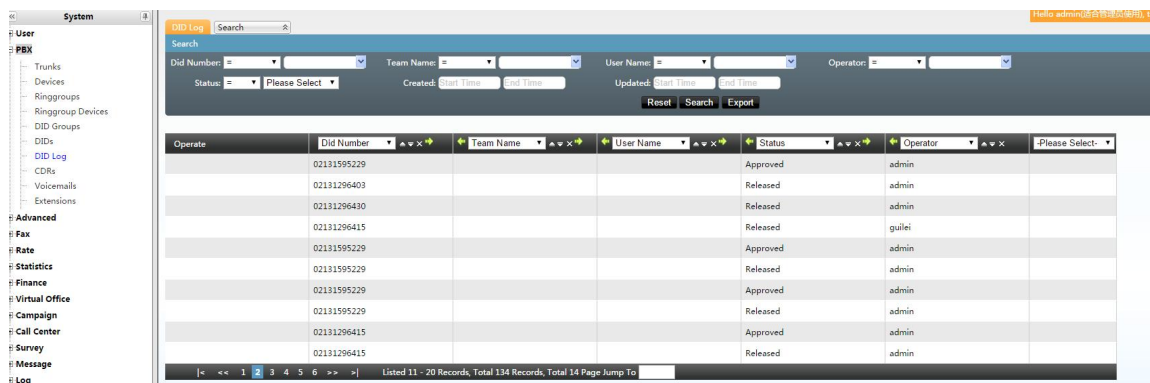


Click **[Detail]** to see the condition of DID in the incoming route.



2.7 DID Log

On the left menu, Click[**PBX**]→ [**DID Log**], entering the management page, and click[**Add**]to open the following window,



Module Function: It is for checking all the calling log.

The item which has this icon  ahead means this call log can be listened to online.

Click  to download the call record.

Double click one log,you can check its detailed info.

DID Log

DID Log

Basic

Did-didnumber*: Empty

Team Name: Empty

User Name: Empty

Status: Released

Operator: admin

Created: 2015-12-24 17:33:42

Updated: 2015-12-24 17:33:42

2.8 CDRs

On the left menu, click [PBX]-->[CDRs] to open bellow page:

Outbound Amount : 0 Outbound Duration : 00:00:00 Outbound Credit : 0 Inbound Amount : 0 Inbound Duration : 00:00:00 Inbound Credit : 0 Team Credit : 0 System Credit : 0

Record	Download	CIDNum	Dst	Call Date	Billsec	Calltype	ACT CIDNum	Outbound Credit
<input type="checkbox"/>		2668	017715389898	2016-04-06 19:36:20	00:00:18	DIALOUT	2668	0.7000
<input type="checkbox"/>		13584921246	2668	2016-04-06 19:35:16	00:01:27	DIALIN		0.0000
<input type="checkbox"/>		2668	017715389898	2016-04-06 19:34:12	00:00:35	DIALOUT	2668	0.7000
<input type="checkbox"/>		13584921246	2668	2016-04-06 19:32:59	00:01:45	DIALIN		0.0000
<input checked="" type="checkbox"/>		01057273440	33199669	2016-04-06 19:17:30	00:00:00	DIALIN		0.0000
<input checked="" type="checkbox"/>		15000262540	2870	2016-04-06 18:15:55	00:00:00	TRANSFER		0.0000
<input type="checkbox"/>		15000262540	2876	2016-04-06 18:15:11	00:00:50	DIALIN		0.0000
<input checked="" type="checkbox"/>		2660	888	2016-04-06 18:07:17	00:00:00	DIALOUT	2660	0.0000
<input type="checkbox"/>		2660	2888	2016-04-06 18:05:00	00:01:52	DIALOUT		0.0000
<input type="checkbox"/>		2867	67820741	2016-04-06 18:03:24	00:01:08	DIALOUT	33190727	0.7000

Listed 1 - 10 Records, Total 123 Records, Total 13 Page Jump To

Module Function: to see all call records in the system

The item which has this icon ahead means this call record can be listened to online.

Click to download the call record.

Click to delete the call record.

Double click an item to see the details of the call.

CDRs

View Cdr

Basic

CIDNum:	2668	Dst:	017715389898	CIDName:	2668
DID:	017715389898	Disposition:	ANSWERED	Agent No.:	
User Field:	device dialout	Calltype:	DIALOUT	ACT CIDNum:	2668
Groupname:	设备信息	Outbound Credit:	0.7000	Inbound Credit:	0.0000
Duration:	45	Call Date:	2016-04-06 19:34:12	Answertime:	2016-04-06 19:34:22
Billsec:	35	Destination:	设备	Status:	Normal
Ivrduration:	0	Record:			

Dst.	Call Date	Answer Time	Duration	Billsec	Agent No.	Agentgroupname	Destination	Status	Consult Type	Consult Group Name	Outbound Credit	Inbound credit	Call Type	userfield	Disposition
Return															

Duration: End time minus start time.

IVR duration: End time minus answer time.

2.9 Voicemails

On the left menu, click [PBX]→ [Voicemails], and enter the following page,

System

User

PBX

Trunks

Devices

Ringgroups

Ringgroup Devices

DID Groups

DIDs

DID Log

CDRs

Voicemails

Extensions

Advanced

Fax

Team	Device	Contact	Created Time	Filename	Option
UCServer	2669/2669	*2870* <2870>	2016-03-25 09:34:43	msg0013.wav	
UCServer	2669/2669	*2803* <2803>	2016-03-25 09:34:04	msg0012.wav	
UCServer	2669/2669	*2803* <2803>	2016-03-25 09:33:48	msg0011.wav	
UCServer	2669/2669	*设备* <2879>	2016-03-11 10:47:52	msg0010.wav	
UCServer	2669/2669	*设备* <2879>	2016-03-09 13:15:34	msg0009.wav	
UCServer	2669/2669	*2865* <2865>	2016-03-04 09:34:15	msg0008.wav	
UCServer	2669/2669	*2865* <2865>	2016-03-04 09:33:57	msg0007.wav	
UCServer	2669/2669	*2868* <2868>	2016-02-25 18:40:09	msg0006.wav	
UCServer	2669/2669	*设备* <2879>	2015-12-08 13:16:04	msg0005.wav	
UCServer	2669/2669	*2862* <2862>	2015-12-07 10:26:35	msg0004.wav	

Listed 1 - 10 Records, Total 15 Records, Total 2 Page Jump To

In this page, you can manage this voicemail in the system. The voicemails are listed in reverse-chronological order of the messages.

Module: Listen to the voicemail message. If someone left you a message, you can hear it in this page.

Team, Device: To which device of which team the message is left.

Contact: Who leaves this message.

Created time: Time the voicemail creates.

File name: The name of the voicemail in the system.

The voicemails are stored in server: /var/spool/asterisk/voicemail/团队标识/分机号码/INBOX/

Click to listen to the voicemail online;

Click to download the voicemail;

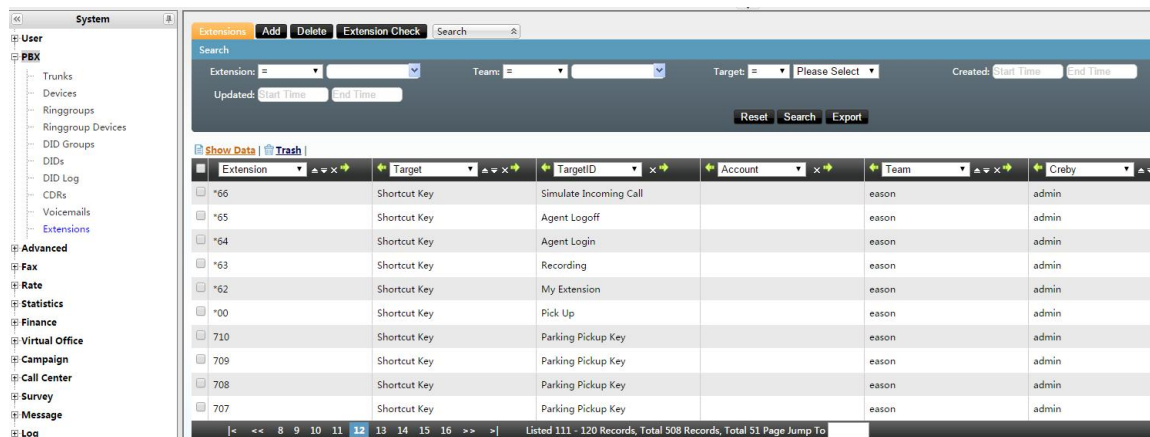
Click to delete the message.

Whether you can leave a device a message depends on whether this device has enabled Voicemail status.

when you select Template in Team→ Advanced, VM Sender, and when the system gets new voicemail, it will be sent to the set email address of the device as an email.

2.10 Extensions

On the left menu, click[**PBX**]-> [**Extensions**], and enter the page below



The data in the page come from

- 【Device】
- 【Queue】
- 【Ring group】
- 【IVR】
- 【Conference】
- 【short key】
- 【Hotkeys】
- 【System application】

In this page you can set extension number for the modules above. Click 【Add】 to open the adding page,

Extension: add extension number for inside calls.

Team: which team this extension nubmer belongs to.

Target: the target module.

Target ID: the corresponding data.

Then Click [Save], and you can see the newly added information shown in this page.

Extension	Target	TargetID	Account	Team
<input type="checkbox"/> 707	Shortcut Key	Parking Pickup Key		Línea de camión
<input type="checkbox"/> 706	Shortcut Key	Parking Pickup Key		Línea de camión
<input type="checkbox"/> 705	Shortcut Key	Parking Pickup Key		Línea de camión
<input type="checkbox"/> 704	Shortcut Key	Parking Pickup Key		Línea de camión
<input type="checkbox"/> 703	Shortcut Key	Parking Pickup Key		Línea de camión
<input type="checkbox"/> 702	Shortcut Key	Parking Pickup Key		Línea de camión
<input type="checkbox"/> 701	Shortcut Key	Parking Pickup Key		Línea de camión
<input type="checkbox"/> 700	Shortcut Key	Parking Key		Línea de camión
<input checked="" type="checkbox"/> *90	Shortcut Key	Forward All Cancel Key		Línea de camión
<input type="checkbox"/> *92	Shortcut Key	Busy Forward Key		Línea de camión

< << 1 2 3 4 5 6 >> > Listed 11 - 20 Records, Total 636 Records, Total 64 Page Jump To

【Number Duplication】 Related to both extension number and team. If one shares the same of the both, the system will note you the number duplication.

【Data Delete】 In the extension page, you can delete the number added to the module here, and for those data that were not added in this page, it will jump to the corresponding module, and you can delete the data in that page.

Double click the item to enter the edit page.

Extension Management

Edit Extension

Basic

Extension*:

*81

Team:

Línea de camión

Target:

Shortcut Key

TargetID:

Skip DNC

Return

In the sub-edit page, data in grey means unchangeable, and only extension numbers can be changed. And if duplicated number appears, the system will note you.

3. Advanced

3.1. Queues

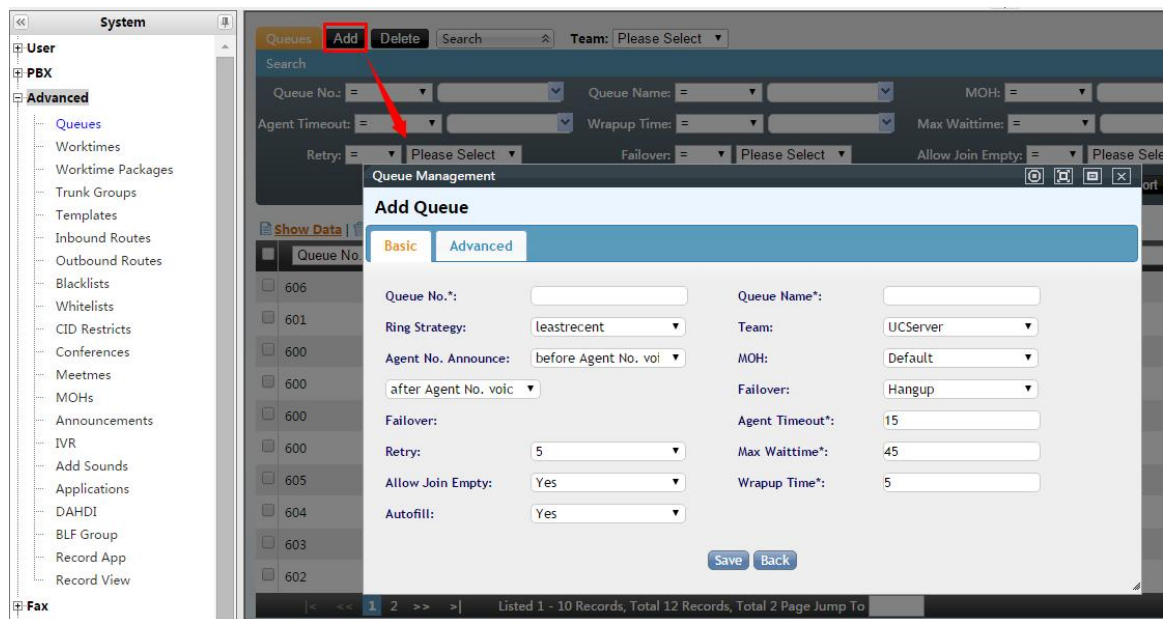
Queue and agent group work together. Agent groups are for setting and managing staff, while queues are for configuring parameters in the calling process. A queue without a bound agent group has no use.

Add a queue



When saving an agent group without a queue, the system will remind you of assigning a queue for this group.

On left menu please go to **[Advanced]** → **[Queues]** → **[Add]** to add a new queue.



Mandatory fields

Queue No.: Made up of numbers, serves as the queue's internal extension within this team, cannot be repeated.

Queue Name: name this queue.

Ring Strategy:

- **lastrecent:** agent who is being idle for the longest from the last call has the priority.
- **fewestcalls:** it rings the agent who has made the least calls first, if he does not answer, it will ring the second least one.
- **randmo:** it rings agents randomly.
- **rrmemory:** ringing each available interface

Team: which team is using this queue

Agent number announce: Choose a piece of voice message to play before or after announcing the agent number. Before is like "This is agent 2000", and after is like "2000 agent is speaking".

MOH: the music playing when the agents are in the queue waiting.

Failover: when the agent has been waiting longer than the queue timeout, it will be transferred to failover: hangup, announcement, IVR, queue, device, ringgroup, voicemail, or play busy tone.

Failover: When you select what failover, select the target here

Agent Timeout: when this agent does not pick up the phone within the time, the queue will call the agent holding the next priority.

Retry: After how long will it call the agent again after one timeout.

Max Wait time: When the agent wait for this long, the call will be transferred to the failover target.

Allow Join Empty: When choose yes, even if there is on agent in the queue, the customer can still be waiting in the queue; when choose no, and there is no agent signing in, the caller will be transferred to the failover target.

Wrapup Time: When failed to call one agent, for after how long it will call the next agent.

Autofill: When choose yes, and how many caller waitng in queue will the queue assign there caller to the available agents. Otherwise, the system will assign them accordingly.

Advanced

The screenshot shows the 'Queue Management' window with the 'Add Queue' form. The 'Advanced' tab is selected. The form contains the following fields:

- Auto-switch:
- Add CIDNum Prefix:
- Agent Privilege:
- Rate Announce:
- Queue Press:
- Queue Press Target ID:
- Periodic Announce:
- Maxlen:
- Add CIDName Prefix:
- Matched Last Call:
- Join Announce:
- Agent Announcement:
- Queue Press Target:
- Periodic Announce Frequency:
- Announce Frequency:
- Weight:

Buttons: Save, Back

Auto-Switch: Can be used to choose a queue automatically

Let's say we have an IVR to ask caller to choose the language, then there's a global variable LANGUAGE=cn, here we put "LANGUAGE=cn", then system will allow customer to join this queue

How to config IVR so system can choose queue automatically:

config a global variable in IVR

in IVR, transfer choose "Queue", active id select "Auto Switch"

The screenshot shows the 'Flow Management' window with the 'Edit Main Flow' form. The 'Transfer' tab is selected. The form contains the following fields:

- Name: rate for agent
- Conditions:
- ActionID *:
- Trans From *: inputcode
- Transfer:
- Skip Circular Queue:

Buttons: Save, Back

[Fold Upper Param](#)

Conditions	Transfer	Delete
0	Hangup	Details Delete Edit
1	Announce	Details Delete Edit
2	IVR	Details Delete Edit

Add CIDName Prefix:Add a prefix to CallerID Name

Add CIDNum Prefix:Add a number to CallerID Number

Matched Last Call: If set Yes, it will match the last call.

Agent Privilege (Conference) : Whether the agent is allowed to start a conference

Join Announcement: The message play to caller once they join the queue

Rate Announce: The message play to agent before they can rate to the agent

Agent Announcement: The message play to agent when agent pick up a call;

Queue Press: Set a quick press;

Queue Press Target: The target for the quick press, IVR or voicemail;

Queue Press Target ID: Choose an ID for this target;

Periodic Announce Frequency: The frequency for playing the periodic announcement;

Periodic Announce: The content of the announcement;

Announce Frequency: The frequency for playing the queue No.;

Maxlen: The max length of a queue;

After the edit, click "Save" and you will see



Click the yellow bar to apply the changes, after the click, the bar will disappear, and give a reload success message

double click the record to open the edit window, then you can edit the options

Queue Management			
Edit Queue			
Basic		Advanced	
Queue No.*:	600	Queue Name*:	eason
Ring Strategy:	fewestcalls	Team:	eason
Agent No. Announce:	before Agent No. voice	MOH:	CE SHI
	after Agent No. voice	Failover:	Hangup
Failover:		Agent Timeout*:	15
Retry:	5	Max Waittime*:	45
Allow Join Empty:	Yes	Wrapup Time*:	5
Autofill:	Yes		
Return			

3.2.Worktimes

On the leftmenu[**Advanced**]-> [**Worktimes**],open the page.

The screenshot shows the 'Worktime' management interface. At the top, there are tabs for 'Add', 'Delete', and 'Search'. Below the tabs is a search bar and several filter fields: 'Startweek', 'Endweek', 'End Date', 'Start Date', 'Name', 'Start', and 'End'. There are also 'Reset', 'Search', 'Export', and 'xls file' buttons. Below the filters is a table with columns: 'Name', 'Start Date', 'End Date', 'Start', and 'End'. The table contains five rows of data for packages named 'astercc01' through 'astercc05'. At the bottom, there is a pagination bar showing 'Listed 1 - 5 Records, Total 5 Records, Total 1 Page Jump To'.

Name	Start Date	End Date	Start	End
astercc05	00-00	00-00	00:00:00	23:59:00
astercc04	00-00	00-00	08:30:00	17:00:00
astercc03	00-00	00-00	09:00:00	18:00:00
astercc02	00-00	00-00	00:00:00	23:59:00
astercc01	00-00	00-00	08:00:08	17:00:00

Module function: Set a working time period, like 8 a.m. to 5 p.m. from Monday to Wednesday every week.

Add

Click Add to add work time for the work time package module.

The screenshot shows the 'Add WorkTime' form. At the top, there are tabs for 'Add', 'Delete', and 'Search'. Below the tabs is a search bar and several filter fields: 'Name', 'Start Date', 'End Date', 'Start', and 'End'. There are also 'Reset', 'Search', 'Export', and 'xls file' buttons. Below the filters is a table with columns: 'Name', 'Start Date', 'End Date', 'Start', and 'End'. The table contains five rows of data for packages named 'astercc01' through 'astercc05'. At the bottom, there is a pagination bar showing 'Listed 1 - 5 Records, Total 5 Records, Total 1 Page Jump To'. The 'Add WorkTime' form is open, showing fields for 'Name*', 'End Date', 'End', 'Team', 'Start Date', 'Start', and 'Weekday'. A red dashed box highlights the 'Name*' field, and a red arrow points to it. A red error message 'This field is required.' is displayed above the 'Name*' field. The 'Weekday' field is a slider with values 1 through 7. At the bottom, there are 'Save' and 'Back' buttons.

Name: name this package.

The setting contains three part, date, time and week.

Start date: the date the work starts on

End date: the date the work ends on



The work time comes to efficiency and loses efficiency on these two dates.

Star

t (time)

End (time)



The work time comes to efficiency and loses efficiency at these two time points each day

Week day



The work time comes to efficiency and loses efficiency in these weeks

Team: select which team this work time is for.

As shown above in the picture. We have set a national holiday work shift time table, it is from 9 am to 4 pm from Oct.1 to Oct.7.

Click save and return to the work time management page to see the newly added data.

Edit

Double click the item to edit.

WorkTime Management

Edit WorkTime

Basic

Name*: 休息2 Start Date: 00-00

End Date: 00-00 Start: 18:00:00

End: 23:55:00 Weekday: 1 2 3 4 5 6 7

Team: UCServer

Confirm **Return**

Weekday: After adjusting the scroll bar, remember to click **【confirm】**.

3.3. Worktime Packages

On the left menu, **[Advanced]** → **[Worktime Package]**, open the page

Name	Note	Status	Creby	Created	Delete
222		Enable	admin	2016-01-07 15:35:42	Delete
测试		Enable	admin	2014-09-26 14:36:08	Delete

Listed 1 - 2 Records, Total 2 Records, Total 1 Page Jump To

Module function: According to your business needs, we can put work times together as a worktime package.

Worktime package is often used by the dialer in Campaign module to control the work time of the dialer (in what period of time does the dialer work).

Add

Adding page:

The screenshot shows the 'WorkTimePackage Management' window with the 'Add WorkTimePackage' dialog box open. The dialog has a 'Basic' tab and contains the following fields:

Name*:	<input type="text"/>	Status:	Enable
Team:	UCServer	Worktime*:	Select Options
Note:	<input type="text"/>		

At the bottom of the dialog are 'Save' and 'Back' buttons. A red box highlights the 'Add' button in the background interface, with a red arrow pointing to the dialog title.

Name: name this worktime package

Status: whether to enable this time package

Team: To which team this package belongs.

Work time: choose one or more work time(s) to build up a work time package.

Note: notes for this package.

Save and see the newly added data.

Edit

Double click the item and edit

The screenshot shows the 'WorkTimePackage Management' window with the 'Edit WorkTimePackage' dialog box open. The dialog has a 'Basic' tab and contains the following fields:

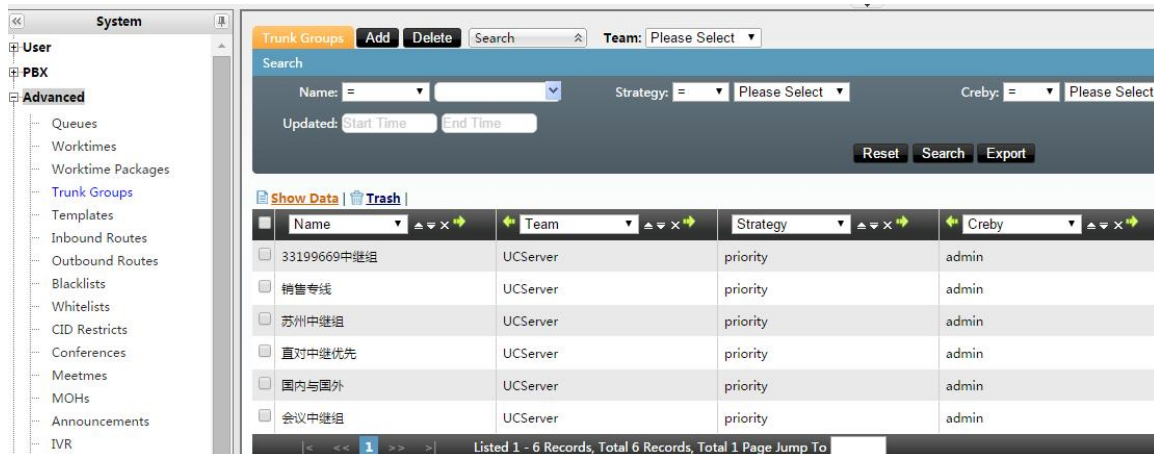
Name*:	222	Status:	Enable
Team:	UCServer	Worktime*:	休息, 休息2,
Note:	Doubleclick to edit		

At the bottom of the dialog is a 'Return' button. In the background, a table lists worktime packages with '222' highlighted in a red box and a red arrow pointing to the dialog title.

The items in black bold are editable.

3.4.Trunk Group

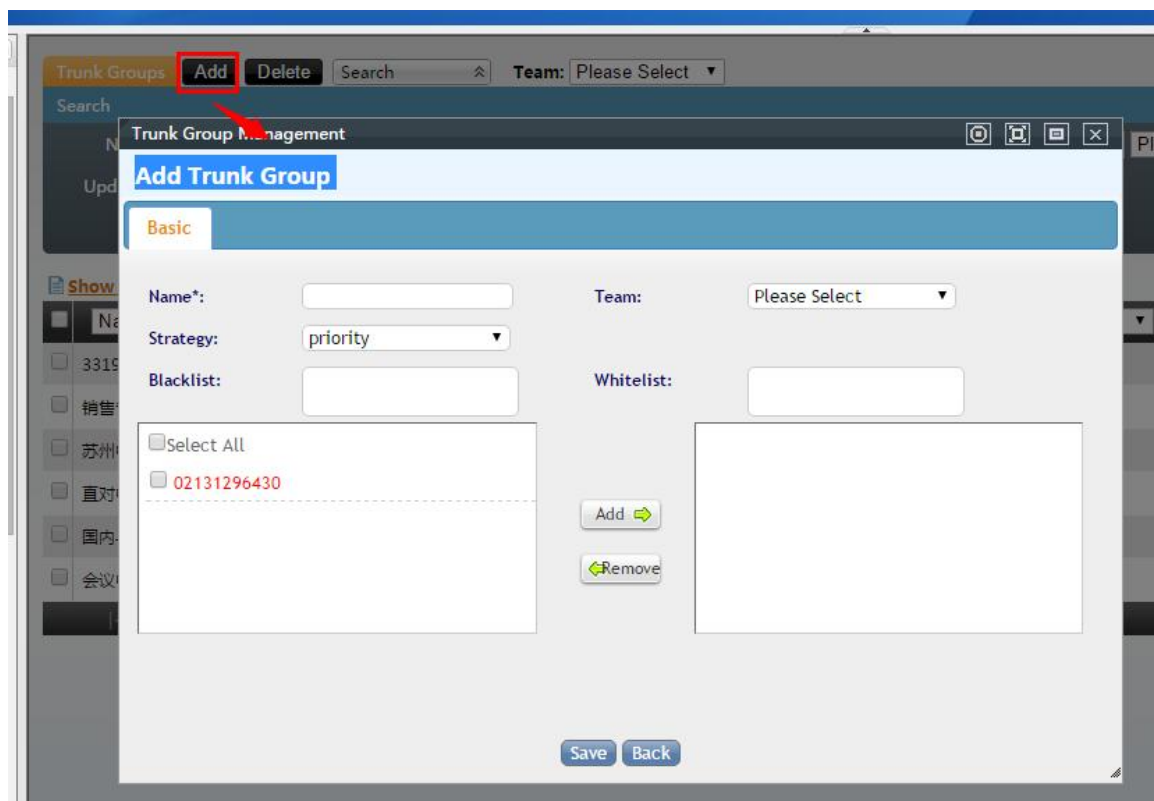
On the leftmenu, **[Advanced]** → **[Trunk Groups]**, open the page



Module function: put trunks together, easy to configure and manage.

Add

Click add to open the trunk group add page.



Name: Name this trunk group.

Team: to which team this trunk group belongs.

Strategy: The strategy this trunk group uses: priority, random, hunt

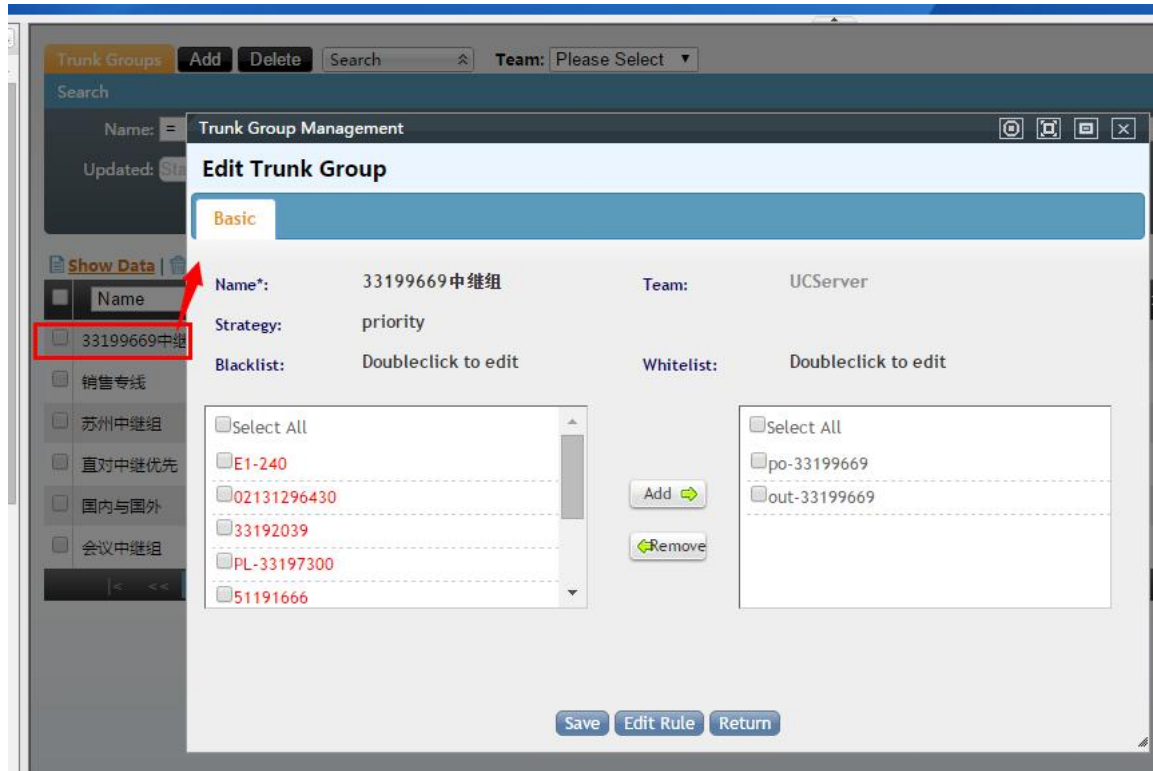
Blacklist: numbers in the blacklist cannot get through the trunk.

Whitelist: once set the trunk group, only the numbers in the whitelist can get through the trunk.

Tick the trunks on the left and add them to the right. Click save and see the newly added data.

Edit

Double click the item to open the edit page.



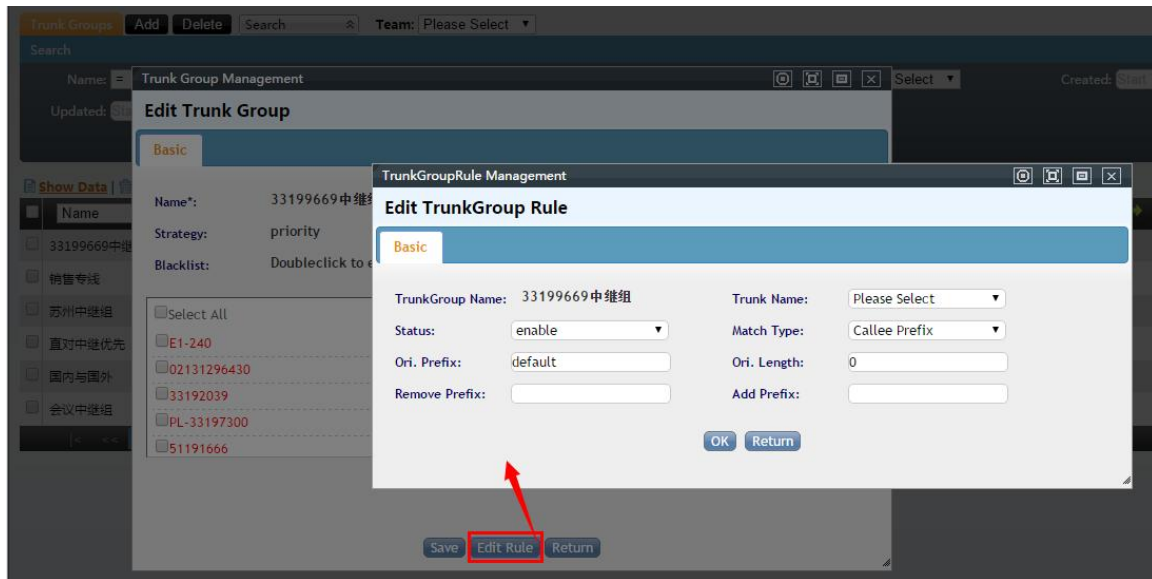
Move the trunk from left to right to add to the trunk group.

Move the trunk from right to left to remove it from the trunk group.

And remember to click save.

Add trunkgroup rule

Click edit rule.



Trunkgroup name: to which trunkgroup the rule is going to be added.

Trunk Name: you can select a trunk under this group.

Status: enable, disabled, refuse

Match Type: Callee Prefix, Callee Area, Callerid Prefix, Callerid Area

Ori. Prefix: it will match the rule when they have same prefix

Ori. Length: it will match the rule when it match the length

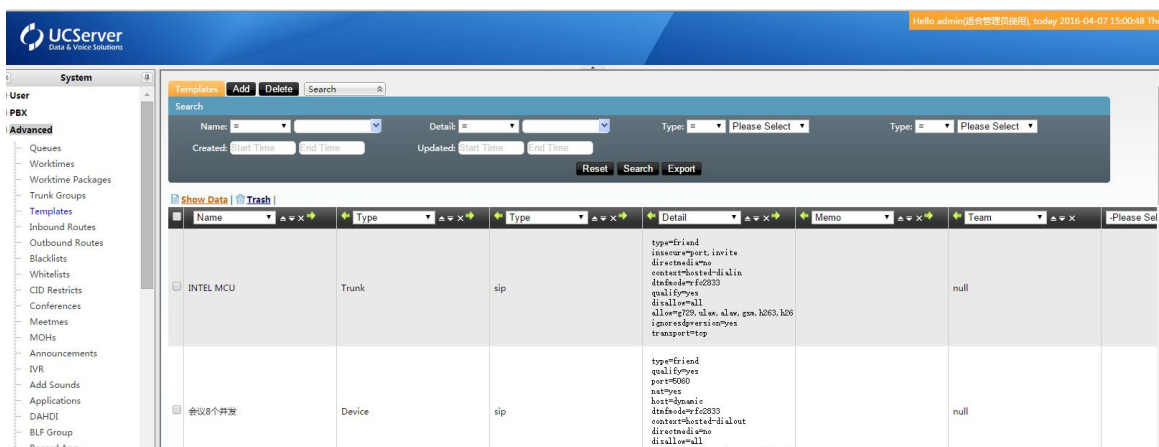
Remove prefix: remove the prefix if it match the rule

Add Prefix: add a prefix if it match the rule

Click "Ok" to save the rule

3.5. Templates

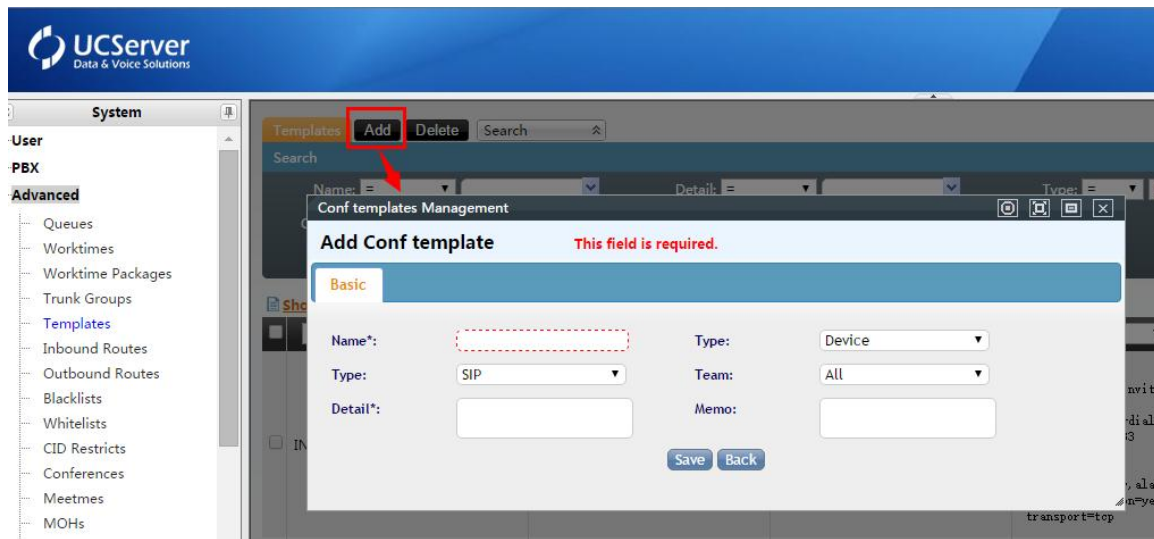
PBX template is for managing trunk or extensions on Asterisk. You can have different templates for new added trunks or extensions. If there is any modification on the template, the trunk or extensions which using this template will do the same modification accordingly. On the left menu, click [Advanced] -> [Template] to enter below page:



Module Function: To offer template for trunk or devices according to different protocol;

Add

Click **【Add】** to open template adding page.



Name: name the template;

Type: Choose type for this template (device or trunk)

Type(Protocol): Choose protocol type for the template(SIP,IAX2,MGCP,DAHDI)

Team: Set a team for this template;

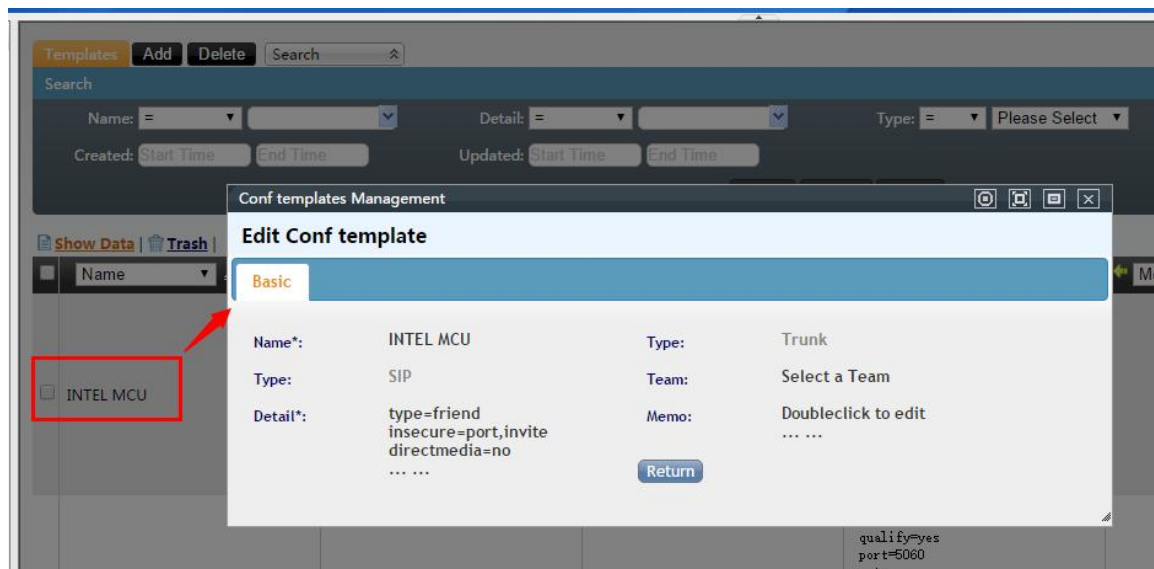
Detail: The detailed configuration formate;

Memo: Give a memo for this template;

Click save and see the newly added data.

Edit

Double click to edit a template:



3.6.Inbound Routes

Inbound route is for routing incoming calls to different destination according to a certain rule.



If accounts and devices are configured in DID page, then the inbound route will not work.

Add inbound route

Menu on the left,[**Advanced**]→ [**Inbound Routes**], click add to open this page.

The screenshot shows the UCServer web interface. On the left, the 'System' menu is expanded, and 'Inbound Routes' is selected under the 'Advanced' section. The 'Add' button in the 'Inbound Routes' header is highlighted with a red box. A red arrow points from this button to the 'Add Inbound Route' dialog box. The dialog box has a 'Basic' tab selected. The 'Name' field is empty and has a red dashed border with the text 'This field is required.' above it. Other fields include 'Team' (set to 'UCServer'), 'DID Match' (set to 'None'), 'CID Match' (set to 'None'), 'Transfer' (set to 'Auto Match'), 'Trunk Match' (set to 'Please Select'), 'Status' (set to 'Enable'), 'Account Name' (set to 'Select a account'), 'Worktime' (set to 'Please Select'), and 'Priority' (empty). 'Save' and 'Back' buttons are at the bottom right of the dialog.

Mandatory fields

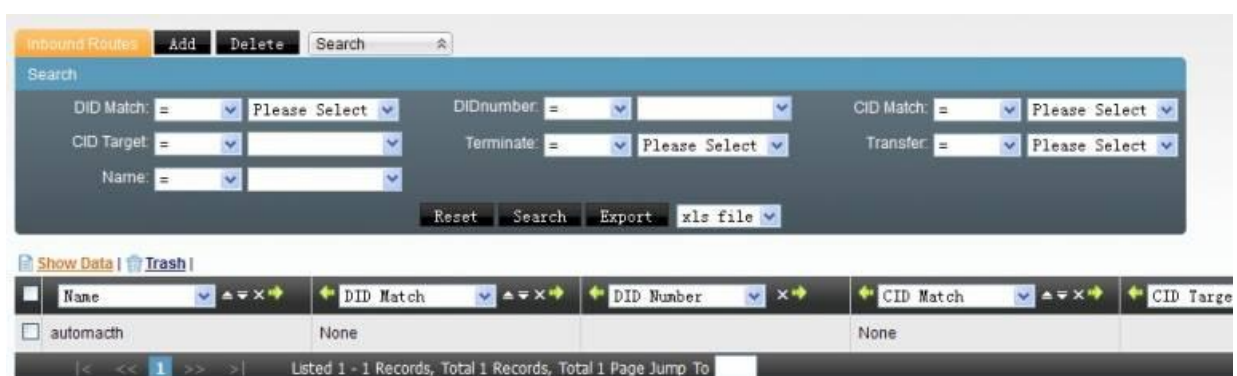
- **Name:** name this route.
- **Team:** to which team this route belongs.

Optional fields

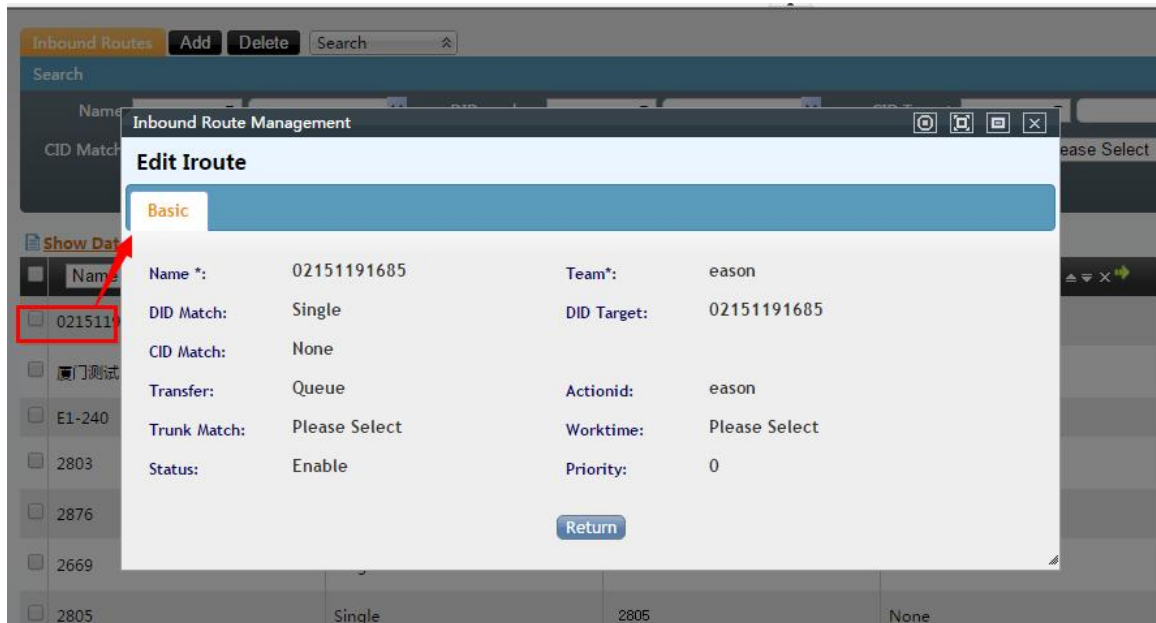
- **DID Match:** whether to enable DID match.
- None: not enable DID match.
- Completed
- Prefix
- Phonearea
- Single: match only one DID number;
- Group: match a DID number group (may contains more than one number).
- When DID is enabled, you need to select **CID Target:** DID number list or DID group list.
- **CID match:** whether to enable CID match.
- **Transfer:** where to transfer the number after match
- Auto match: the number being dialed will be matched in the system.

- Internal numbers will be transferred after being matched.
- If the number cannot be matched in the system as internal number, then we need the trunk to call this number, and we have to choose an account.
You can transfer the call to
 - Ringgroup
 - Queue
 - IVR
 - Device
 - Voicemail
 - Application
 - End (end the call directly)
 - Meeting room
 - Fax
- **Trunk Match:** Whether to enable trunk match.
- **Trunk:** When enables the trunk match, select which trunk need to be matched.
- **Work time:** Select when to enable this inbound trunk, if leave it blank, the route works all the time.
- **Account Name:** Its list changed when the Transfer value changed. Its list including ringing group,queue,IVR, devices and voicemail.
- **Priority:** set the priority level for this route, use number here, the larger the number, the higher the priority.
- **Status:** whether to enable this inbound route.

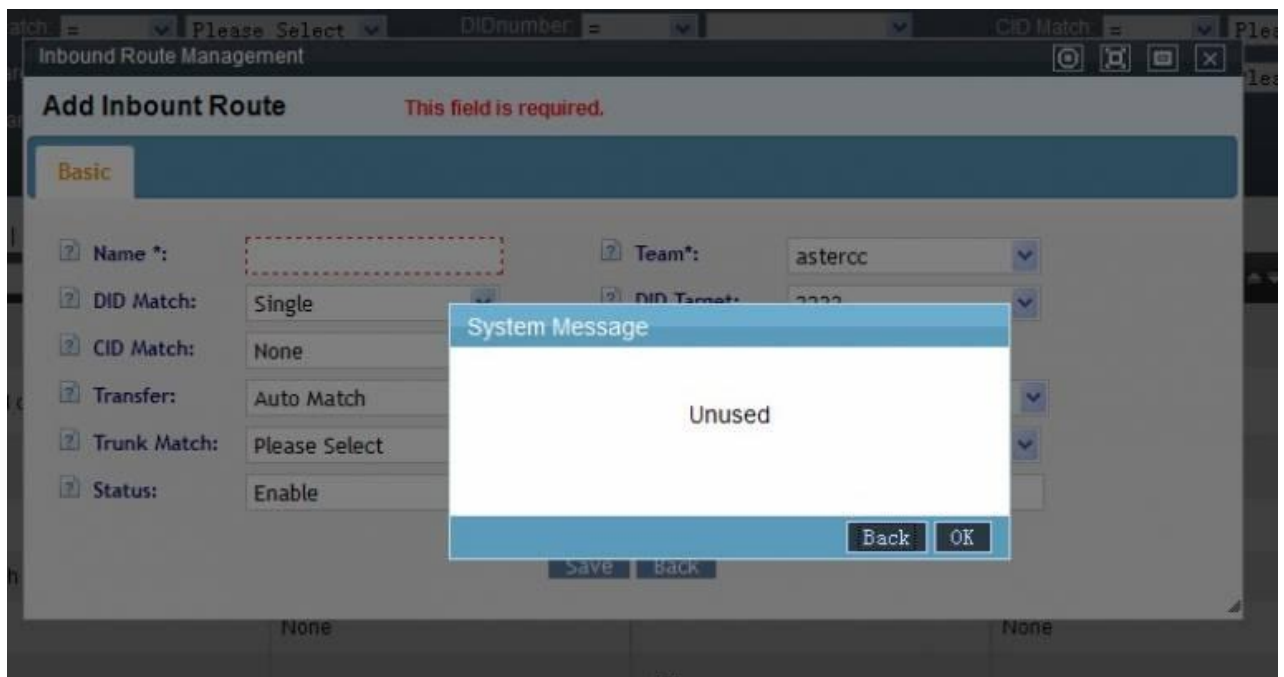
Edit the route

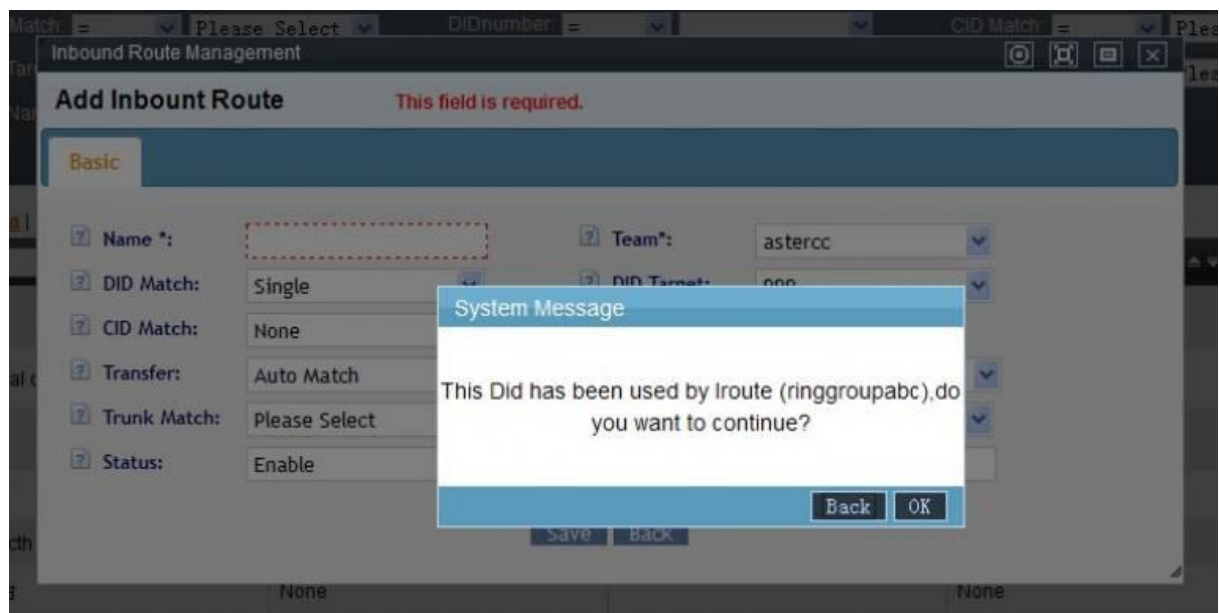


- Double click the item to open the edit page.
- When using the DID match, hover the mouse pointer to see the numbers in that DID group.



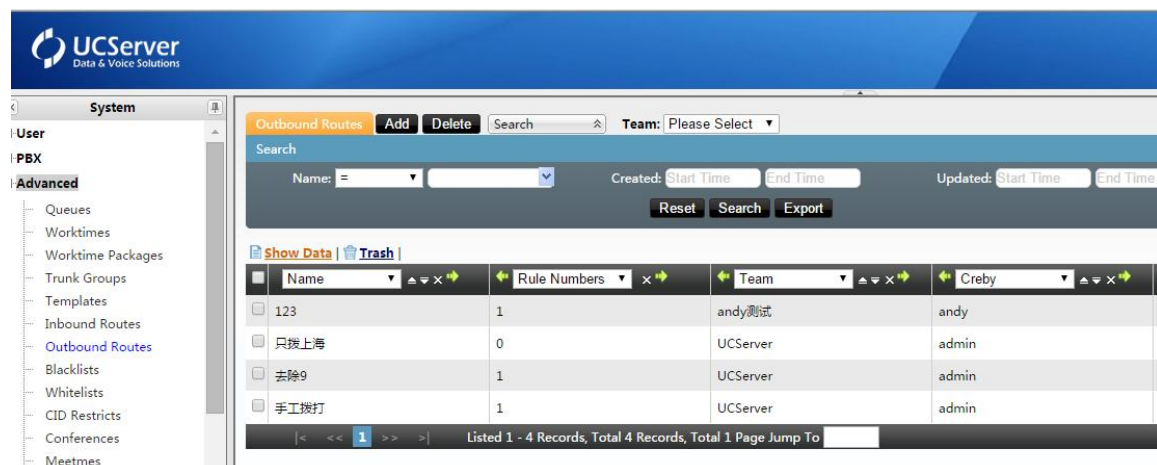
- When using DID match, and choosing the DID ID, the system will show the DID/DID group using status.





3.7.Outbound Routes

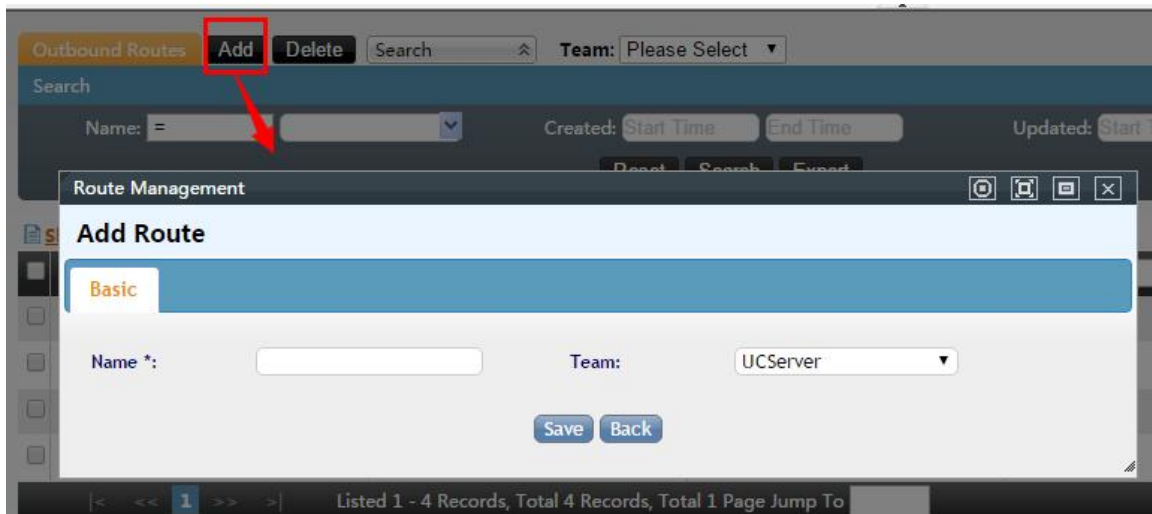
On the left Menu, click [PBX] → Outbound route to open the management page:



Module function: for the account group. You can handle outbound requests in different ways for different account range (account group)

Add

Click add to open the outbound route adding page.



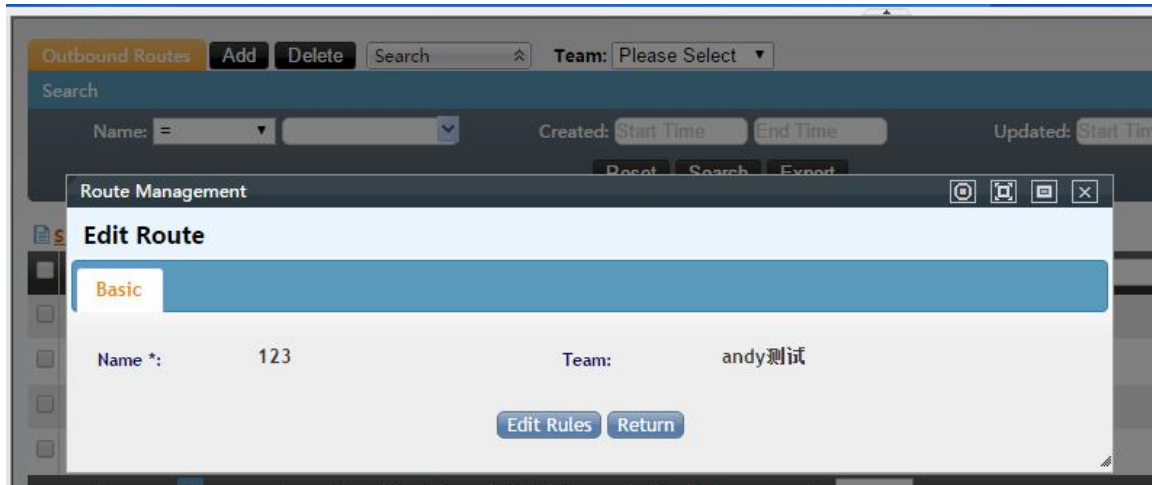
Name: name this route

Team: to which team this route belongs.

Click save and you can see the data on the outbound route page.

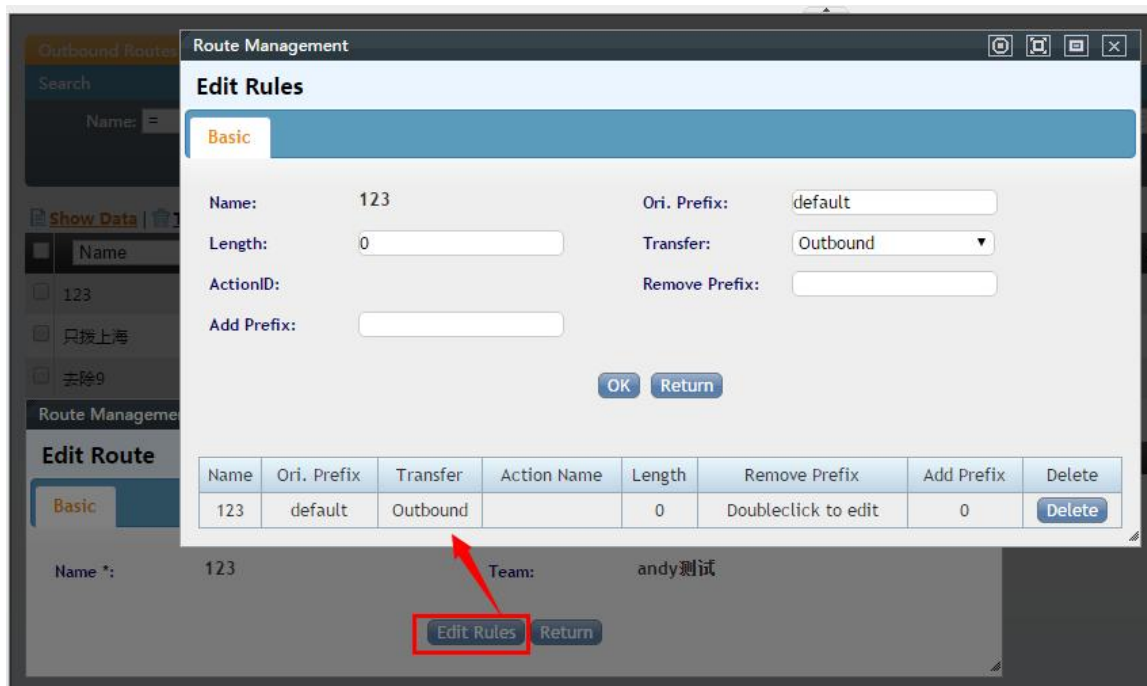
Edit

Double click the item to open the edit page.



Edit rules

Open the route rule edit page.



Ori. Prefix: for number match, and best match the one, if cannot match, choose "default".

Length: Set the length of the number to distinguish the number with the same prefix and different length.

Transfer: what to do after match

- Outbound: make outbound calls directly.
- Ring group
- Queue
- IVR
- End

Action ID: According the different transfer destination, offer different lists (ringgroup, queue or IVR)

Remove prefix: Set a prefix, remove this prefix before matching the number.

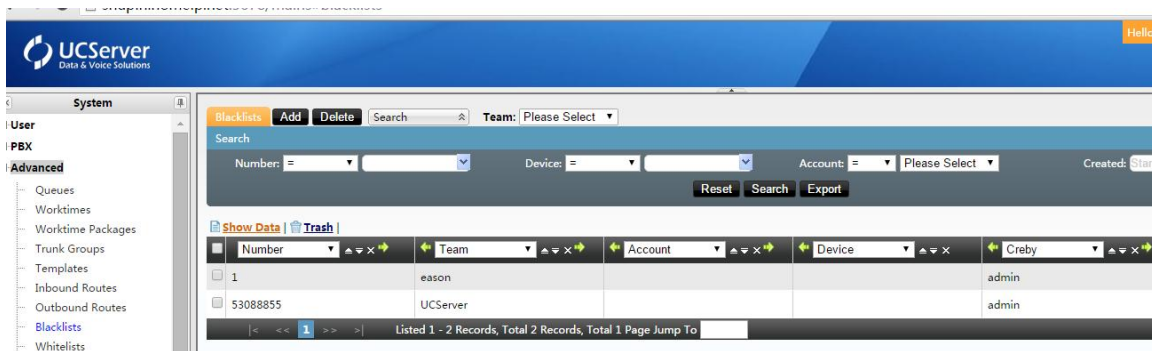
Add prefix: Set a prefix, add this prefix before matching the number.

Click save and the new added rule will be shown on the table below.

Name	Ori. Prefix	Transfer	Action Name	Length	Remove Prefix	Add Prefix	Delete
testOroute	default	Outbound		0	Doubeclck to edit	Doubeclck to edit	Delete

3.8.Blacklists

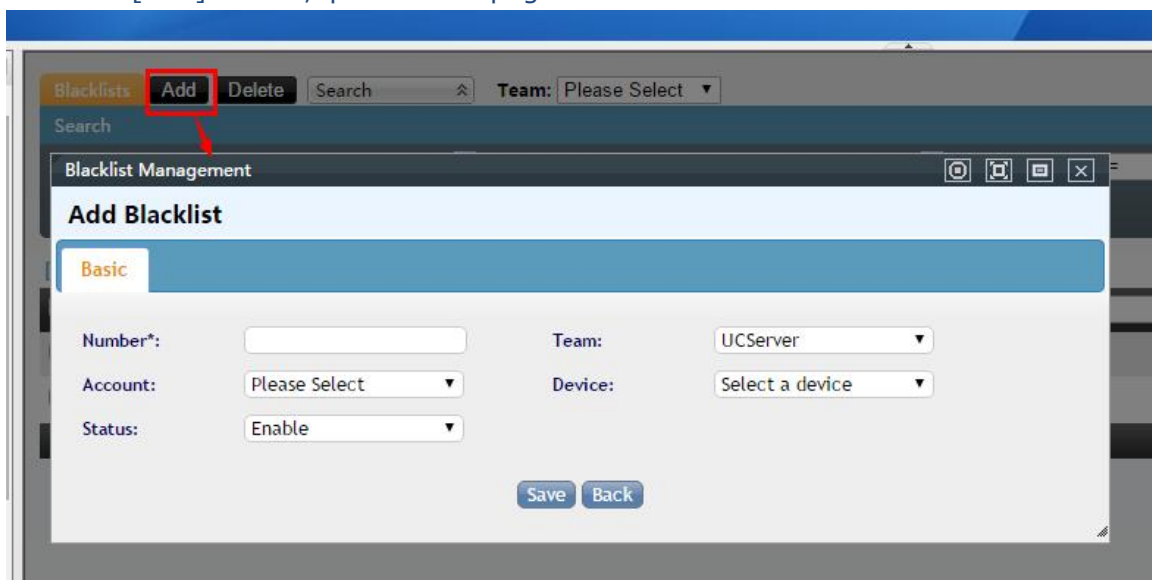
On the leftmenu,click[**Advanced**]-> [**Blacklists**],open the page



Function: Forbid the phone dialin the call center. Once add the blacklist for team , account or device, then the phone will not dialin to the team account or device.

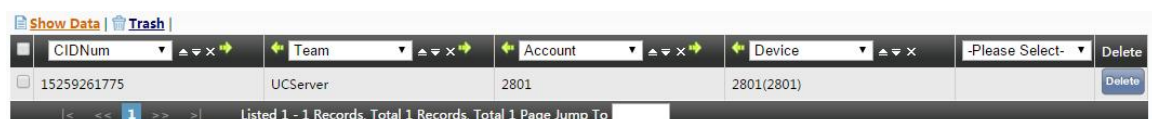
Add

Click the [Add] button, open the addpage

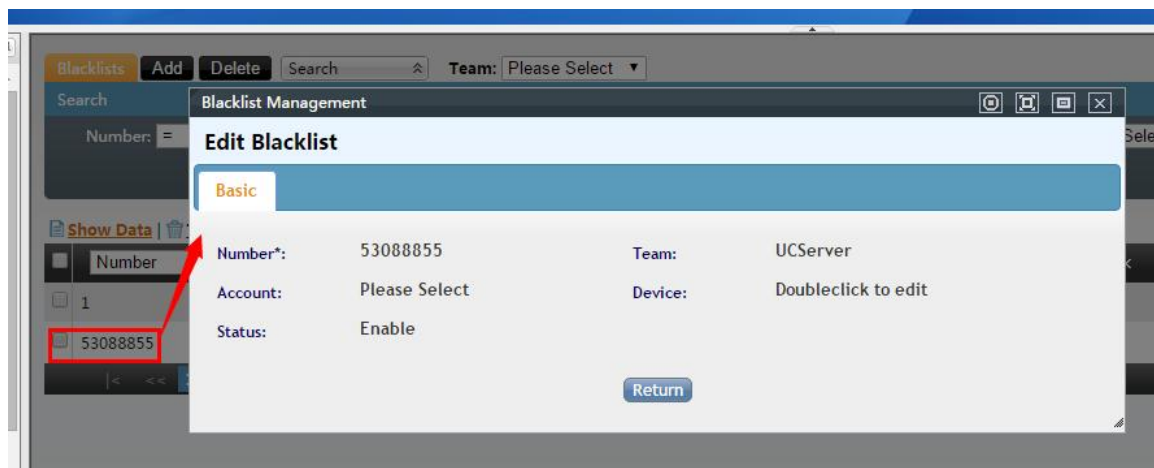


- **Number:** set which phone number to blacklist.
- **Team:** which team is effected by this blacklist rule.
- **Account:** Not required, which account is effected by this blacklist rule.
- **Device:** Not required, which device is effected by this blacklist rule.
- **Status:** whether to enable the blacklist.

Save the data, you can see the data in the page list:

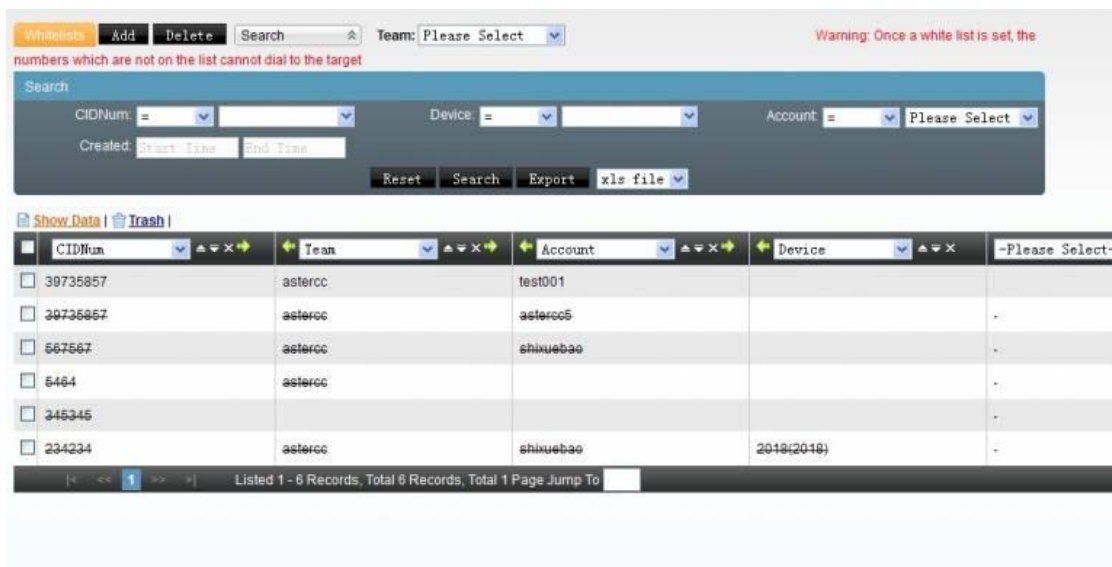


double click the data, can edit this blacklist.



3.9. Whitelists

On the leftmenu,click[**Advanced**]-> [**Whitelists**],open the page



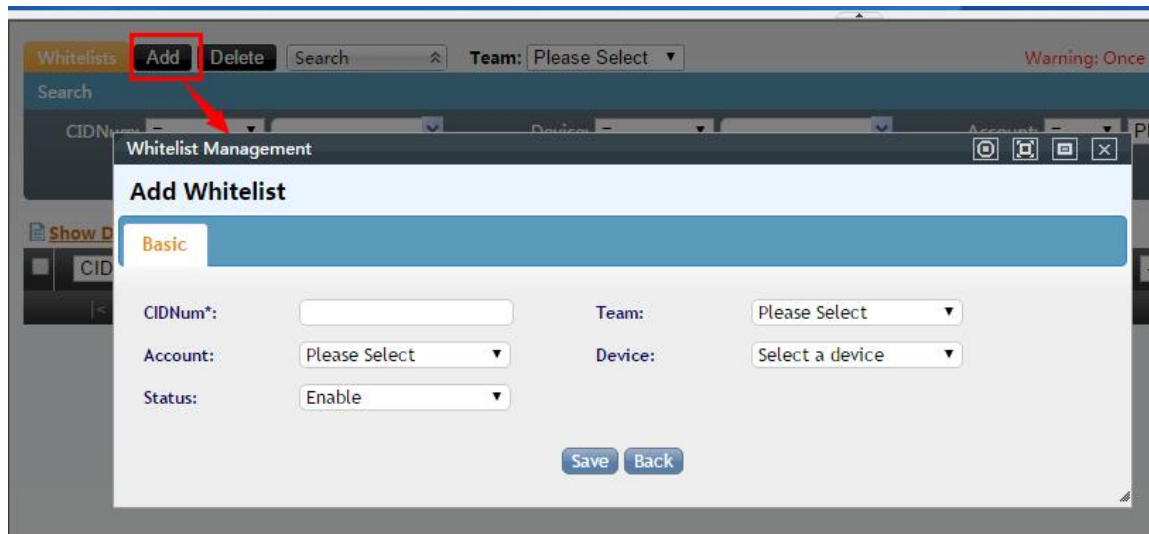
Function:Just only allow the number to dialin.Once a white list is set, the numbers which are not on the list cannot dial to the target



If set the whitelist,the number except the whitelist can not dialin the system

Add Whitelists

Click the [Add] button,open the add page.



- **CIDNum:** Which number needs to be in the whitelist.
- **Team:** Which team the whitelist belongs to.
- **Account:** Not required. If only the team is chosen, it will work under the team. If one account is chosen, it will work under the account.
- **Device:** Not required. If one is chosen, the whitelist will work under the device.
- **Status:** Whether the whitelist can be used.

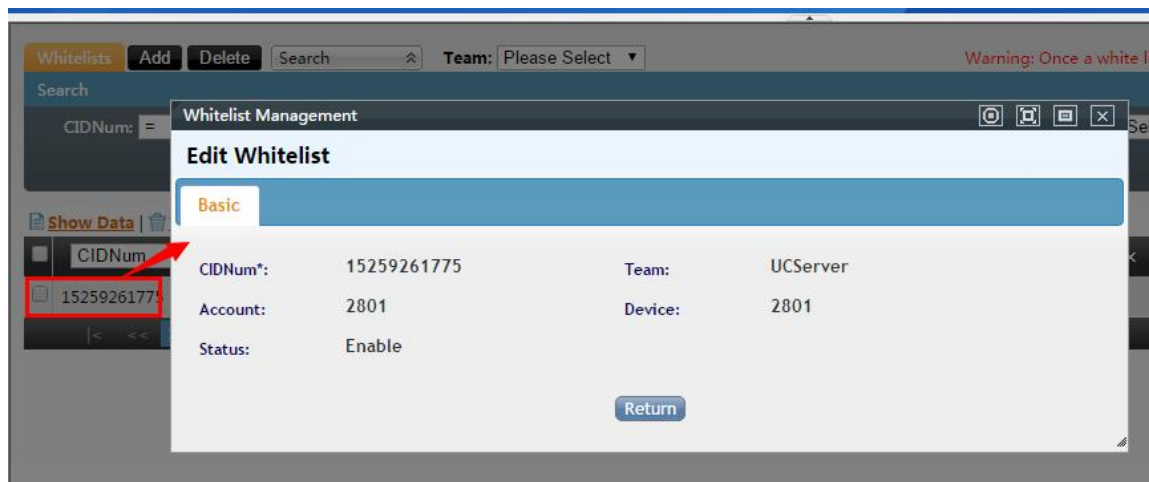
After finishing the data, you can click the [Save] button to save the data. Then you can see the data shown in the list.

	CIDNum	Team	Account	Device	
<input type="checkbox"/>	15259261775	UCTeam	2801	2801(2801)	Delete

Listed 1 - 1 Records, Total 1 Records, Total 1 Page Jump To

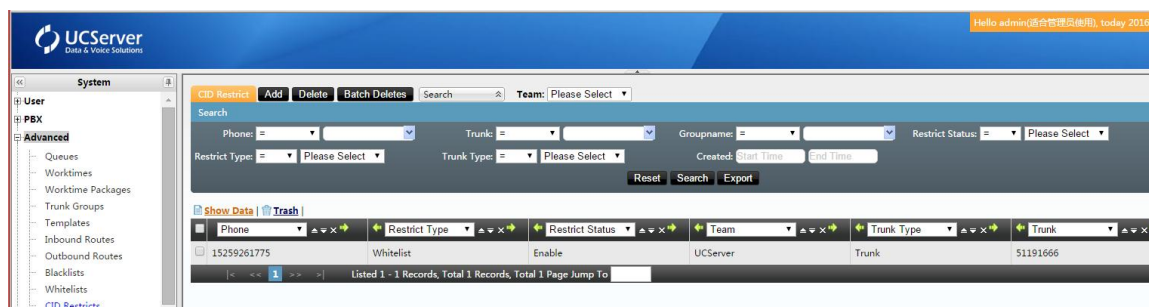
Edit Whitelist

Click the data, can open the edit page, then update the data.



3.10.CID Restricts

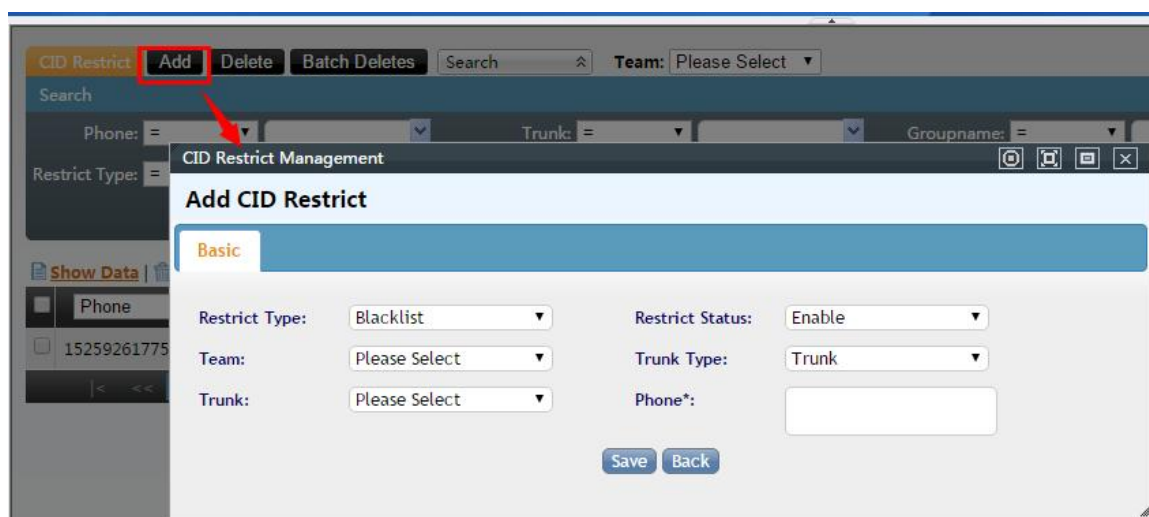
On the leftmenu,click[**Advanced**]-> [**CID Restricts**],open the page



Module Function: Set blacklist and whitelist for trunk or trunk group

Add

Click the [Add] button,open the add page.



Restrict Type:

- Blacklist, the phone numbers listed can not use the trunk to make outbound calls;
- Whitelist, only the phone numbers listed can not use the trunk to make outbound calls;

Restrict Status: Enable or disable this restrict;

Team: Which team is the restrict belongs to.

Trunk Type: trunk or trunk group

Trunk: The trunk or trunk group available listed;

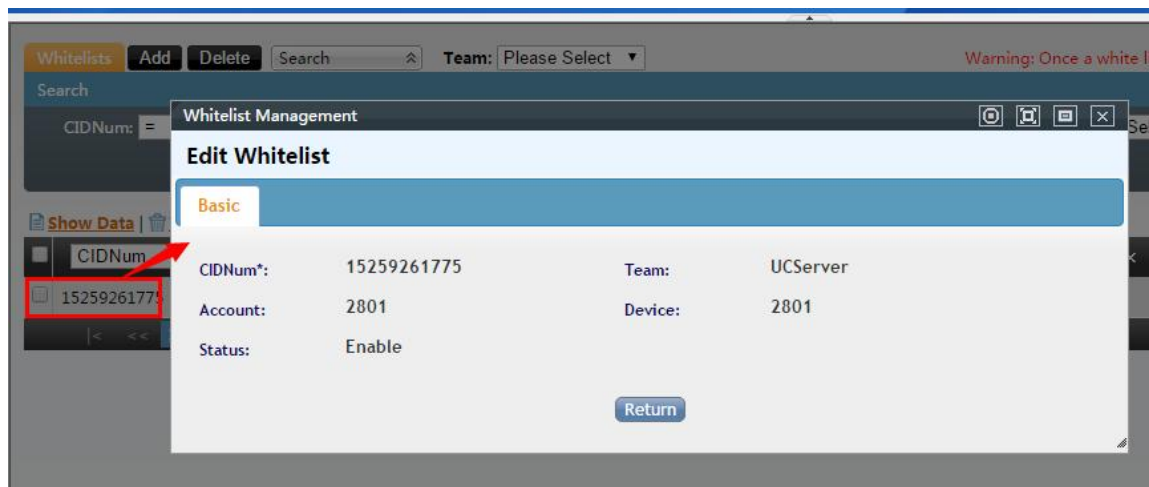
Phone: List the restricted phone numbers

After finished the data,you can click the [Save] button to save the data.Then you can see the data shown in the list.

Phone	Restrict Type	Restrict Status	Team	Trunk Type	Trunk
15259261775	Whitelist	Enable	UCServer	Trunk	51191666

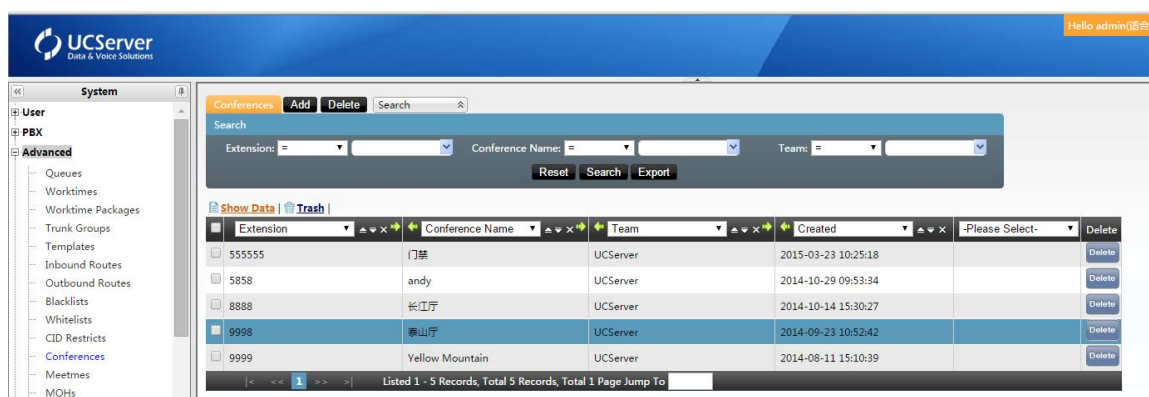
Edit

Double click the data,can open the edit page,then update the data.



3.11. Conferences

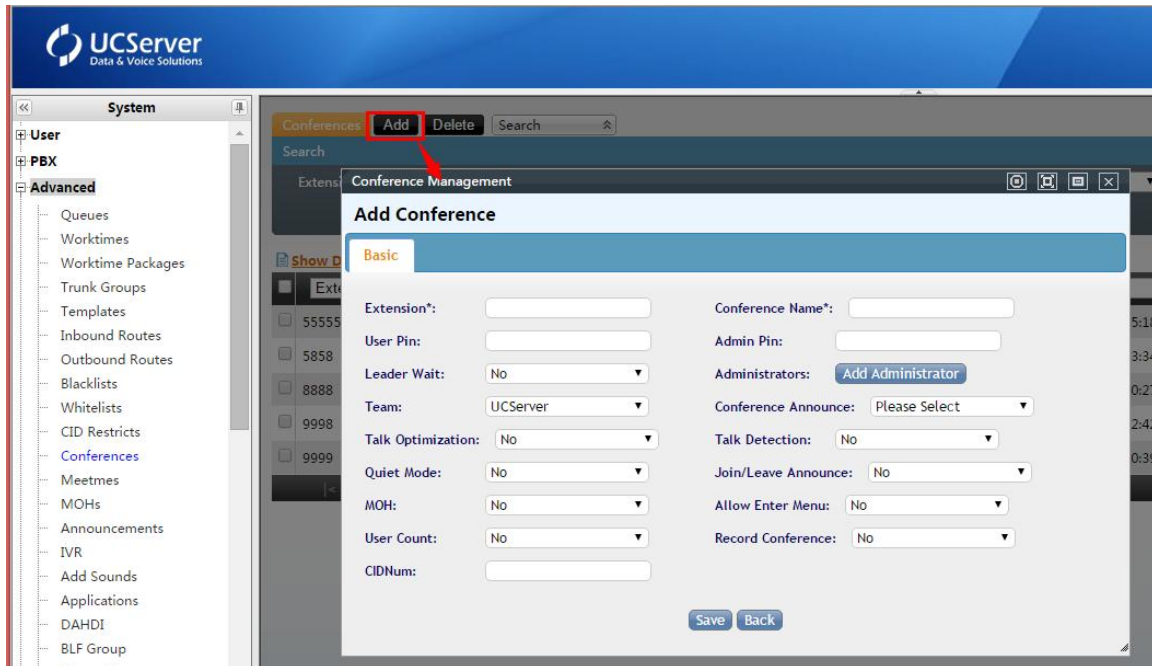
On the left menu, click **[Advanced]** -> **[Conferences]**, open the page



Module Function: To set conference rooms

Add

Click **[Add]** to add new conference room:



Extension: The conference room number, the extensions can call this number to enter the conference;

Conference Name: Name the conference room;

User Pin: The user login password, can be left blank;

Admin Pin: The admin login password, can be left blank;



Note: The user pin and admin pin should not be the same.

Leader Wait: Whether to set wait or not;

Team: To which team this conference belongs to;

Conference Announce: To select an announcement for this conference room

Talk Optimization: Whether to optimize the audio quality or not;

Talk Detection: Whether to optimize the audio quality or not;

Quiet Mode: Whether to set quiet mode or not;

Join/Leave Announce: Whether to set user join or leave or not;

MOH: Whether to set music on hold or not;

Allow Enter Menu: Whether allow to enter menu or not;

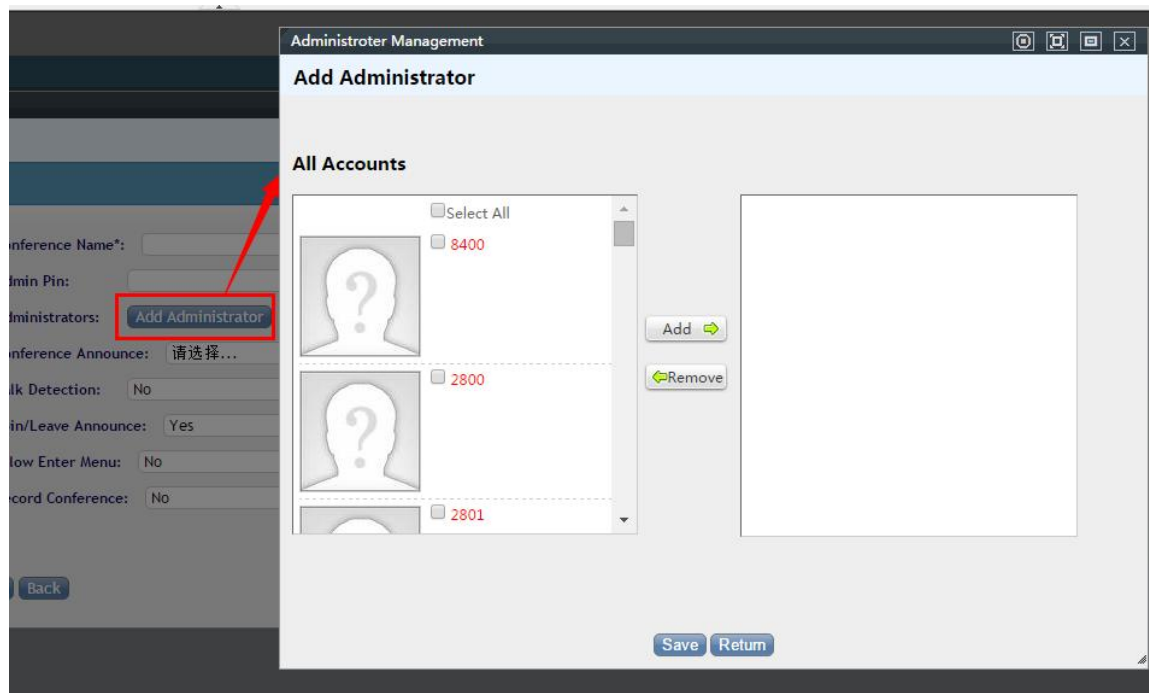
User Count: Whether to count user quantities or not;

Record Conference: Whether to record conference or not;

CID Num: To show CID numbers on the invited party's phone or not;

Add Administrator

Click **【Add Administrator】** to open below page:



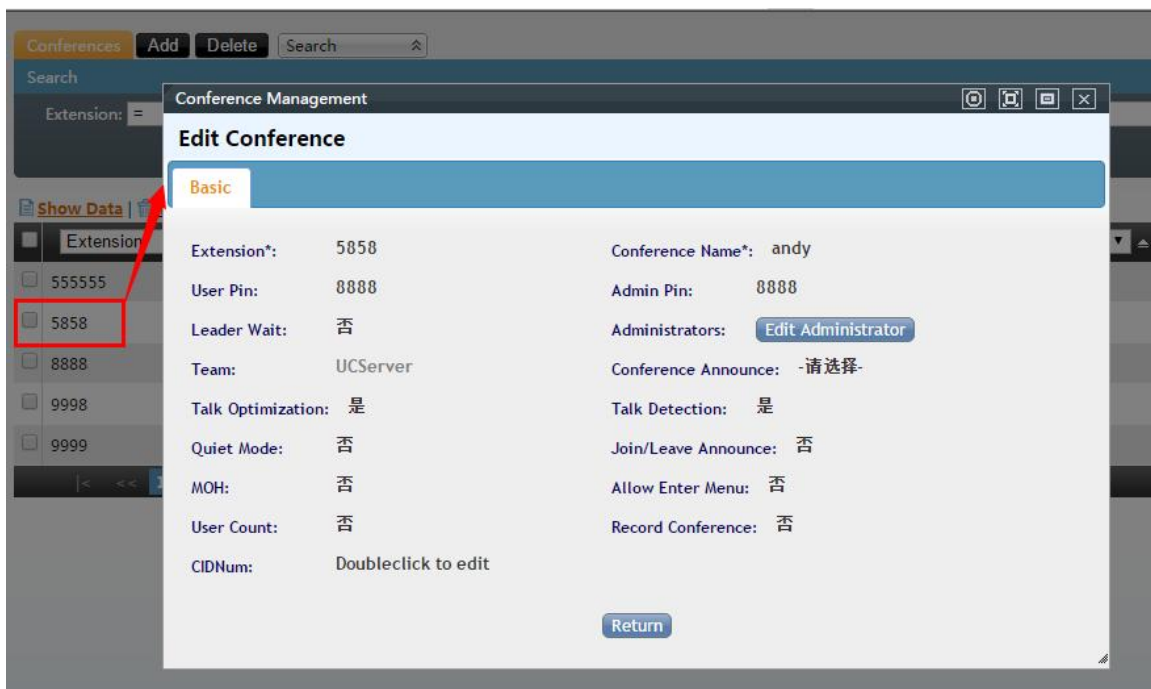
Add the account numbers which you want it to be the conference administrator to the left side, then click Save button.

After finished the data, you can click the [Save] button to save the data. Then you can see the data shown in the list.

Show Data Trash					
Extension	Conference Name	Team	Created	-Please Select-	Delete
555555	门禁	UCServer	2015-03-23 10:25:18		Delete

Edit

Double click the data, can open the edit page, then update the data.



The date in gray is not editable.

3.12.Meetmes

On the leftmenu,click[**Advanced**]-> [**Meetmes**],open the page

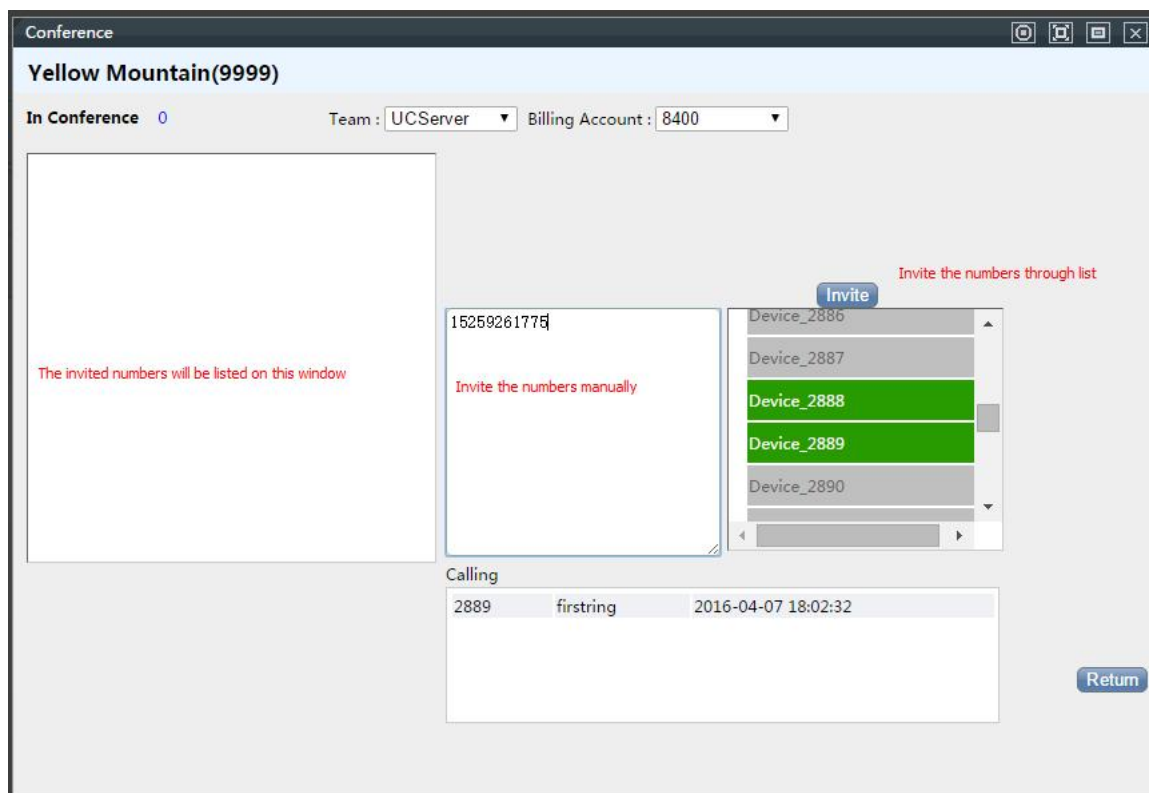



Module Functions: It is for holding a meeting.

If there is no conference room under Conference setting, click this page will go to Conference setting page.

If there are conference rooms, when enter Meetmes page, it will show all the conference rooms, like above picture shows.

Double click a conference room, the bellow page will show:



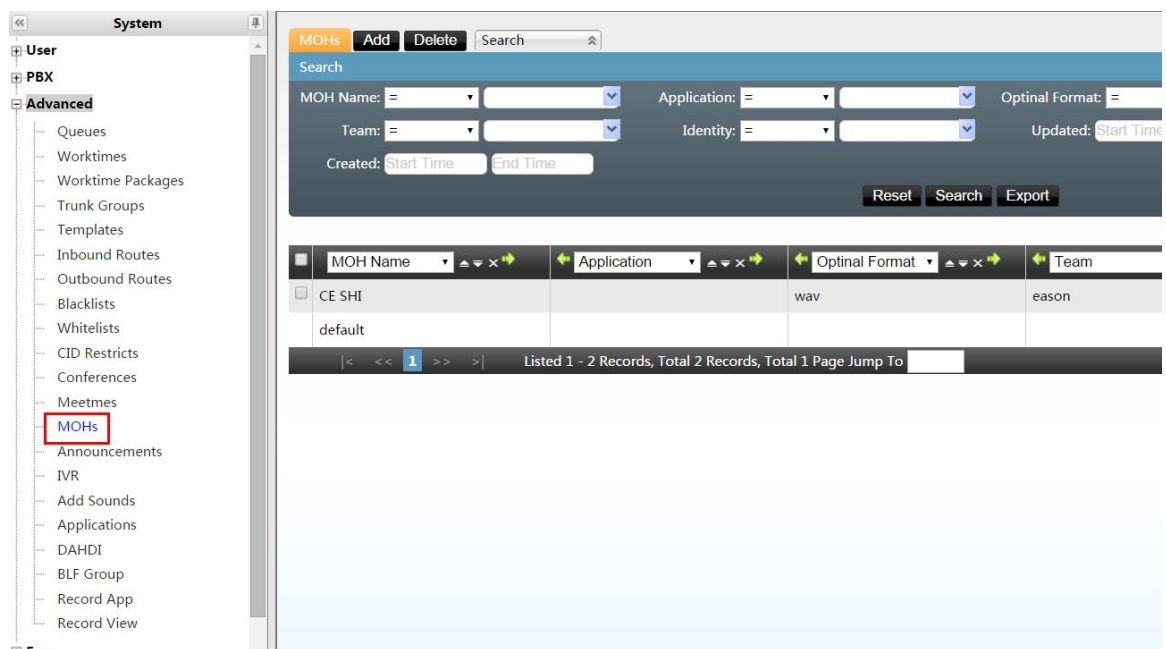
The left window lists all the invited numbers. There are two ways to invite people into the meeting. One is choose the existed extensions or phone numbers from the right drop window, the other is entering the numbers on the mid window. After click  button, the system will call the numbers automatically.



Note: When invite numbers manually, please give newline for different numbers.

3.13.MOH

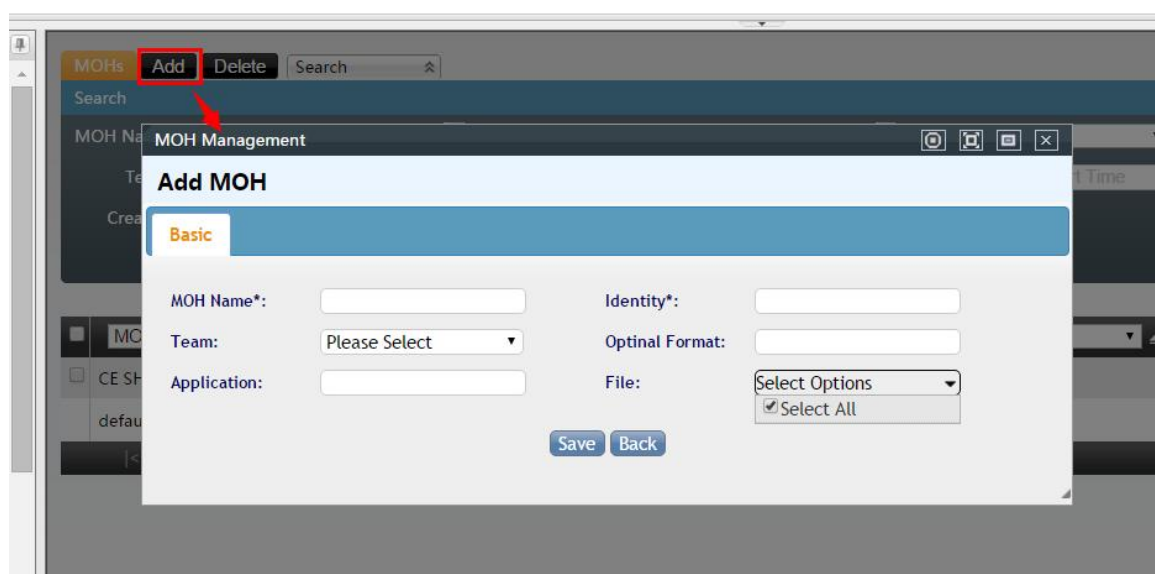
On the left menu, click **[Advanced]** -> **[MOH]**, open the page



Module Function: To manage the Music On Hold

Add

Click **[Add]** button to open the MOH management page:



MOH Name: Name the MOH;

Identity: To give an unique identity to the MOH;

Team: Select a team which will apply this MOH;

File: Choose a MOH file from the file list;

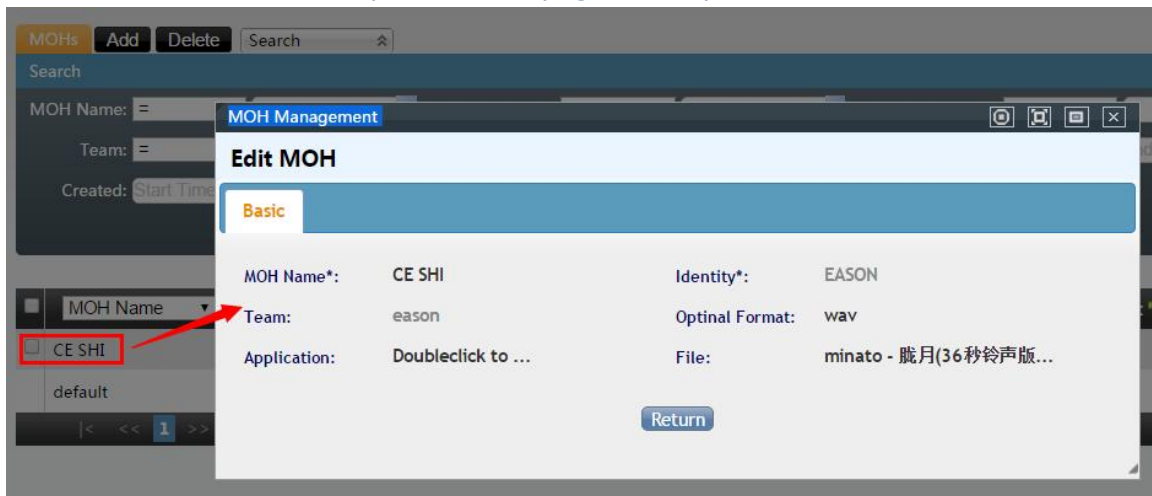
Optinal Format: None.

Application: None

After finished the data,you can click the [Save] button to save the data.Then you can see the data shown in the list.

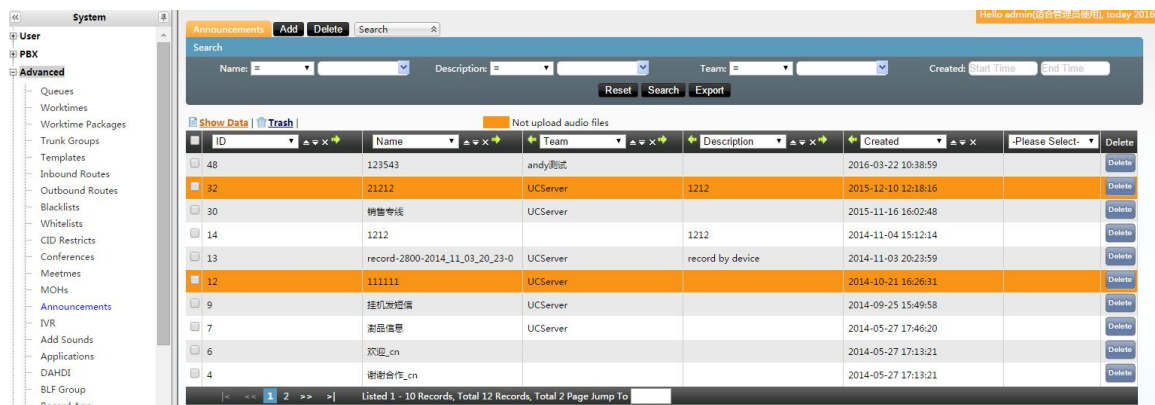
Edit

Double click the data,can open the edit page,then update the data.



3.14. Announcements

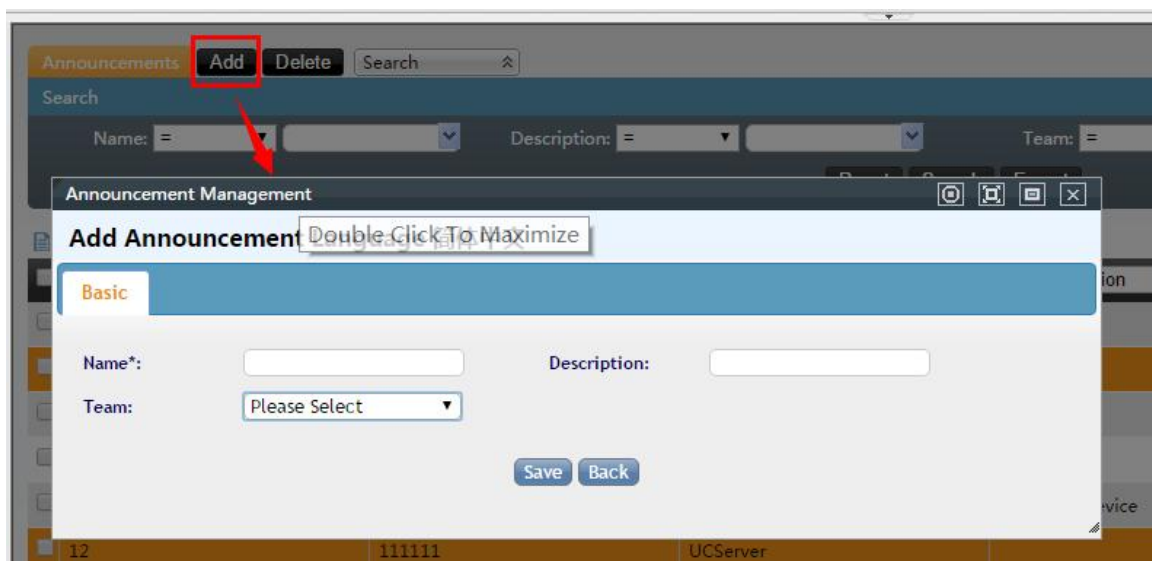
On the leftmenu,click[**Advanced**]-> [**Announcements**],open the page



Module Function: To manage callin announcements

Add

Click [Add] button to open bellow page:

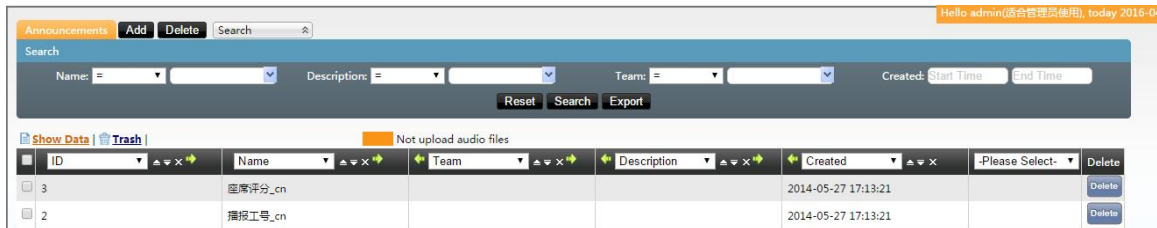


Name: Name this announcement;

Description: Give a description to this announcement

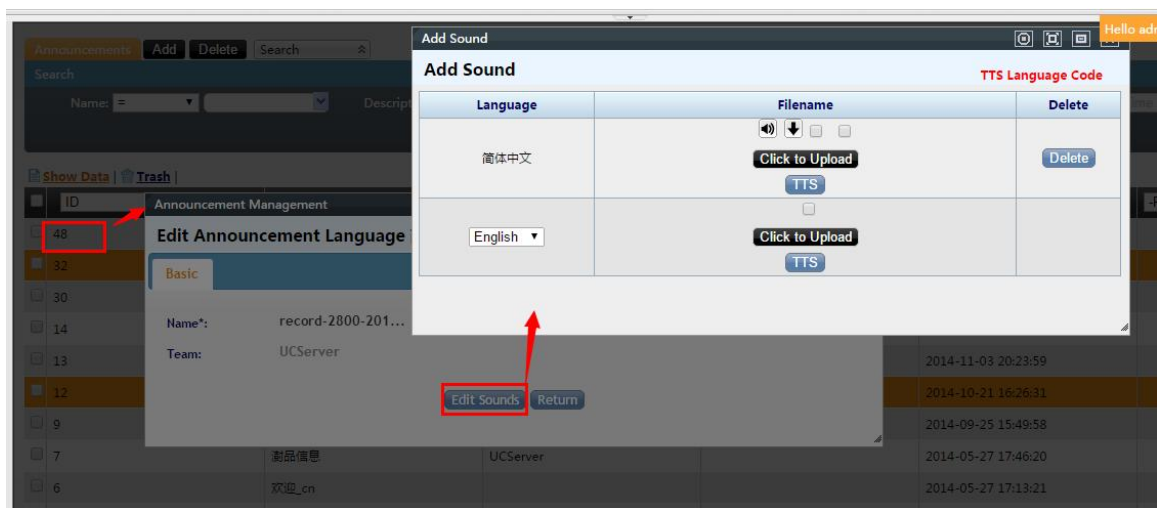
Team: Select a team which the announcement will apply to;

After finished the data,you can click the [Save] button to save the data.Then you can see the data shown in the list.



Edit

Double click the data,can open the edit page,then update the data.



Choose the language, then upload the announcement

Click **Click to Upload** icon to upload the announcement;

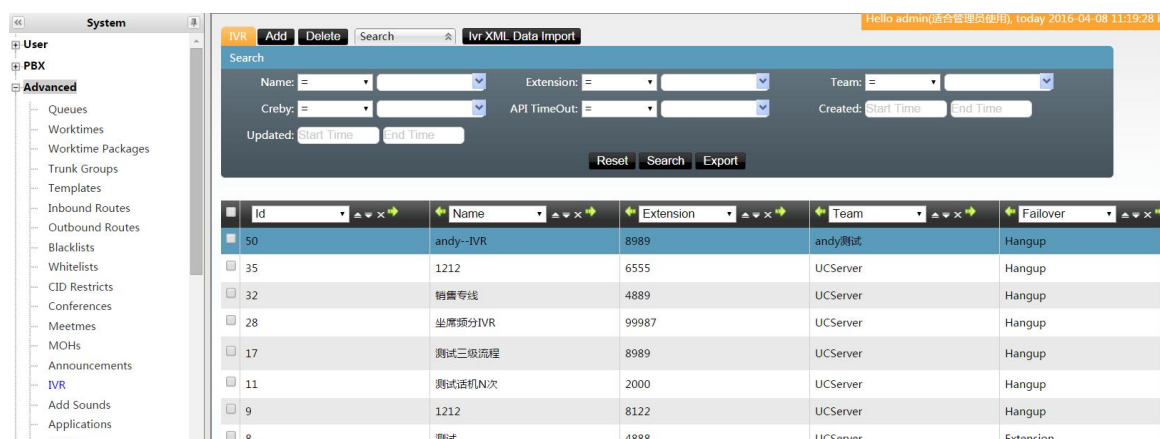
Click  icon to check the announcement online;

Click  icon to download the announcement;

3.15.IVR

Interactive voice response is what we call IVR. When you dial 10086 and you will hear voice instruction to guide you for services. IVR can be used to guide customers, deal interactive services, play voice broadcast etc.

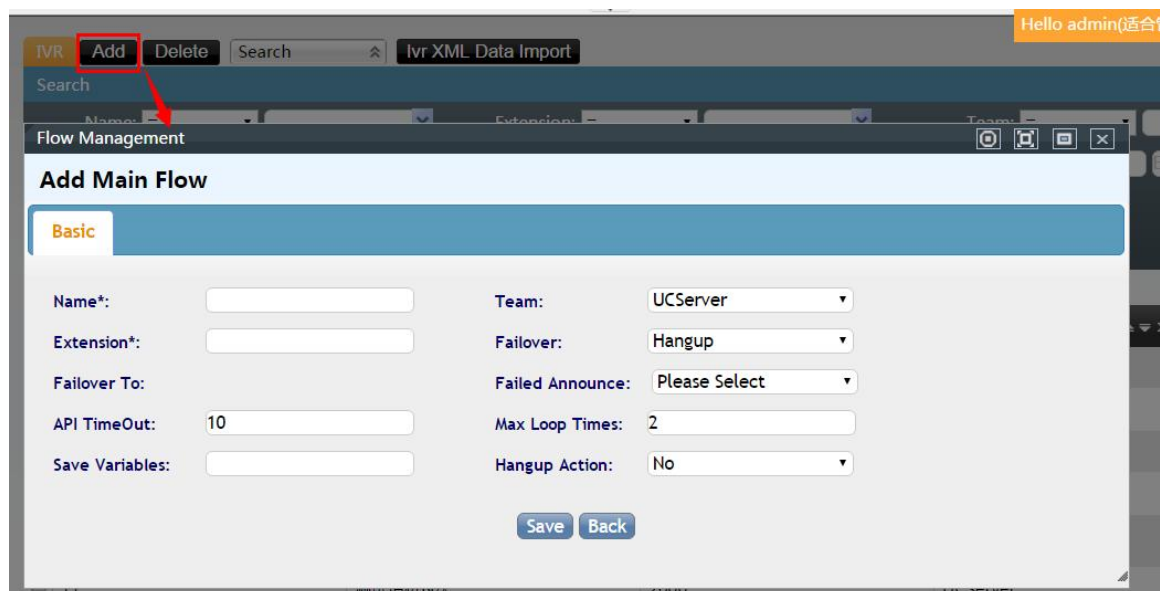
On the leftmenu,click[**Advanced**]-> [**IVR**],open the page



Module function: Set the voice process and control the IVR flow.

Add Main Flow

Click **【Add】** button to open the Add Main Flow page:



Add main ivr flow, which contains many sub-flow. And only main flow can be the original entrance for ivr, and can have an independent extension number

Name: Name the IVR, to show the purpose or function of this ivr.

Team: Apply the data to which team. And when the team is set, the system will automatically get the voice file and queue information under this team.

Extension: We can see this as the telephone number of this ivr in the system, and take this ivr as an automatic interaction telephone. Extension number can only be numbers and not be the same as other extensions.

Failover: When the main flow fails, where will the call go to. There are several reasons cause the failover: ivr reaches the max loop time; fail to call web service; fail to play broadcast; no target has been set to the flow; IVR fails to switch to the device. When these situations occur, the flow will be switched to this target set here.

Failover to: Except failover to hangup and busy, the rest Failover needs choose failover to target

Failed Announcement: Choose an announcement to play when failed over;

Max Loop Time:How many times will an IVR replay before turn to Failover.

Save Variable: To pass the variable to business layer 于给业务层传递的变量。

Hungup Action: webservice, HTTP

Edit

Double click the data,can open the edit page,then update the data.

Flow Management

Edit Main Flow

Basic Action Transfer

Name*: andy--IVR Team: andy测试

Extension*: 8989 Failover: Hangup

Failover To: Failed Announce: Please Select

API TimeOut: 10 Max Loop Times: 2

Save Variables: Doubleclick... Hangup Action: No

Return View Sub IVR Flow

Action

Flow Management

Edit Main Flow

Basic Action Transfer

Name: andy--IVR Action: Answer

Failover: Hangup Failover To:

Failed Announce: Please Select Memo:

Save Back

Save Action Order Fold Upper Param

Action	Action Parameter	Operate	Open All
Answer	Failover : Hangup ;	Delete Edit	
ReadData	Announcement Type : System ;	Delete Edit	

Action: Choose an action for this IVR;

Failover: When the action mission not carry out, the system will do a failover;

Failover to: Except failover to hangup and busy, the rest Failover needs choose failover to target;

Failed Announcement: Choose an announcement to play when failed over;

Meno: Give a description for this IVR;

Save Action Order, you can edit the other action.

Transfer:

Flow Management

Edit Main Flow

Basic Action **Transfer**

Name: andy--IVR Trans From *: inputcode

Conditions: Transfer: Extension

ActionID *: Auto Failover: Hangup

Failover To: Failed Announce: Please Select

Save Back

Fold Upper Param

Conditions	Transfer	Delete
0	Extension (ActionID : 500)	Delete Edit
default	Extension (ActionID : Auto)	Delete Edit

Trans From: Input the transfer code

Conditions: default or blank

Transfer: If carry out transfer action, where it will go to. Please select from the drop list

Action ID: The transfer target;

When finish settings, please save it. You can edit the other transfer.

3.16.Add Sounds

On the left menu, click **[Advanced]** -> **[Add Sounds]**, open the page

System

Queues
Worktimes
Worktime Packages
Trunk Groups
Templates
Inbound Routes
Outbound Routes
Blacklists
Whitelists
CID Restricts
Conferences
Meetmes
MOHs
Announcements
IVR
Add Sounds
Applications
PAHNT

Hello admin(适合管理员使用), today

Bulk Upload How to?

Select Team : Please Select To upload the audio file format conversion : Repeat data, updating the voice file : Execute

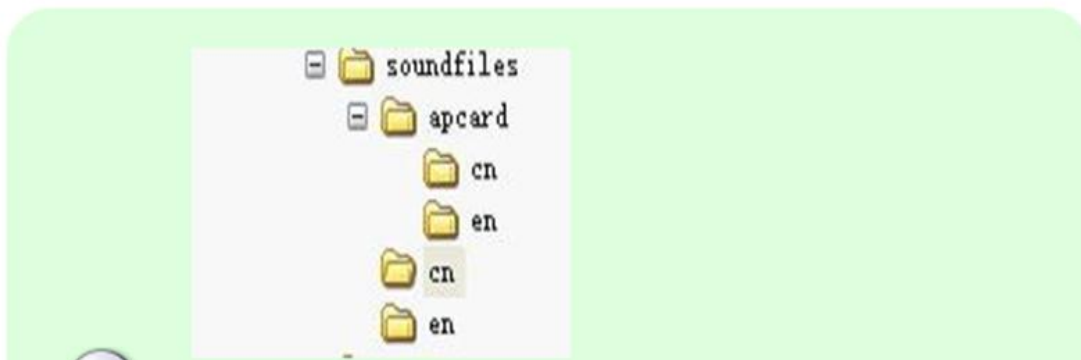
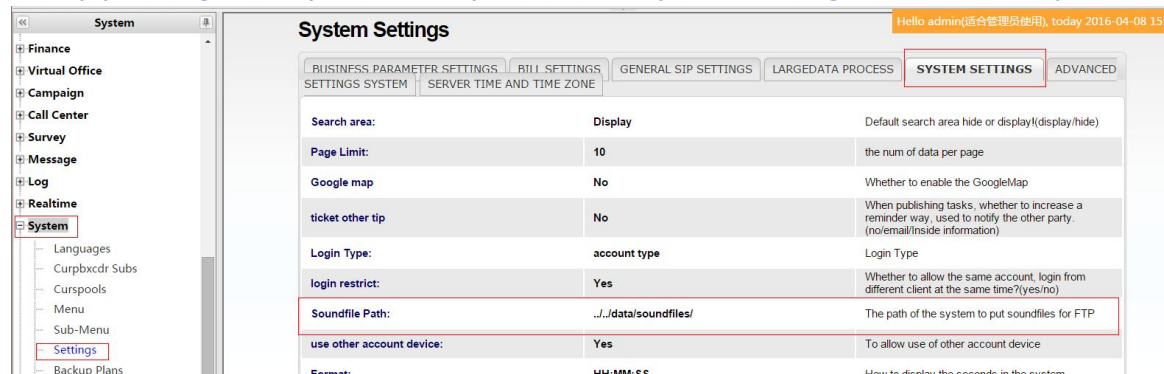
Sound Filelist

File Name	Language
	en cn

Module Function: To save the uploaded sound file in sound file management and call in sound file management

Choose the file language. If the language file is there, it can be clicked, if not, can not be clicked.

Firstly, please go to [System] -> [Systems] -> [System Settings] -> [Soundfile path]



Then when you reenter the add sounds page, it will list all the sound files under this file.

Select Team : --Please Select--

To which team this sound file will be added to. If you choose a team, the system will list all the file under this team. If leave it blank, it will list all the files under Soundfiles catalogue.

To upload the audio file format conversion : ☒

If click, it will list all the mp3 and wav format files.

Click 【Execute】, it will save all the files selected into list, eg:

批量添加语音文件

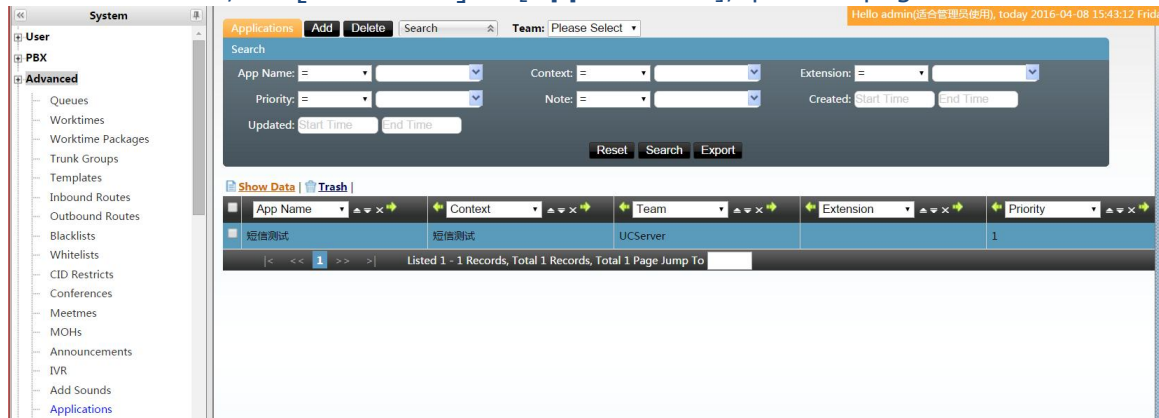
选择团队 : 语音文件 : ☒

语音文件列表

文件名称	语言	<input type="checkbox"/> en	<input type="checkbox"/> cn	<input type="checkbox"/> jp	<input type="checkbox"/> kr	<input type="checkbox"/> ru	<input type="checkbox"/> fr	<input type="checkbox"/> de	<input type="checkbox"/> es
enter-conference-number.wav	<input checked="" type="checkbox"/> en	<input type="checkbox"/> cn	<input type="checkbox"/> jp	<input type="checkbox"/> kr	<input type="checkbox"/> ru	<input type="checkbox"/> fr	<input type="checkbox"/> de	<input type="checkbox"/> es	
mljenmp3team.mp3	<input type="checkbox"/> en	<input type="checkbox"/> cn	<input type="checkbox"/> jp	<input type="checkbox"/> kr	<input type="checkbox"/> ru	<input type="checkbox"/> fr	<input type="checkbox"/> de	<input type="checkbox"/> es	
mljenwavteam.wav	<input type="checkbox"/> en	<input type="checkbox"/> cn	<input type="checkbox"/> jp	<input type="checkbox"/> kr	<input type="checkbox"/> ru	<input type="checkbox"/> fr	<input type="checkbox"/> de	<input type="checkbox"/> es	
mljcnmp3team.mp3	<input type="checkbox"/> en	<input checked="" type="checkbox"/> cn	<input type="checkbox"/> jp	<input type="checkbox"/> kr	<input type="checkbox"/> ru	<input type="checkbox"/> fr	<input type="checkbox"/> de	<input type="checkbox"/> es	
mljcnwavteam.wav	<input type="checkbox"/> en	<input type="checkbox"/> cn	<input type="checkbox"/> jp	<input type="checkbox"/> kr	<input type="checkbox"/> ru	<input type="checkbox"/> fr	<input type="checkbox"/> de	<input type="checkbox"/> es	

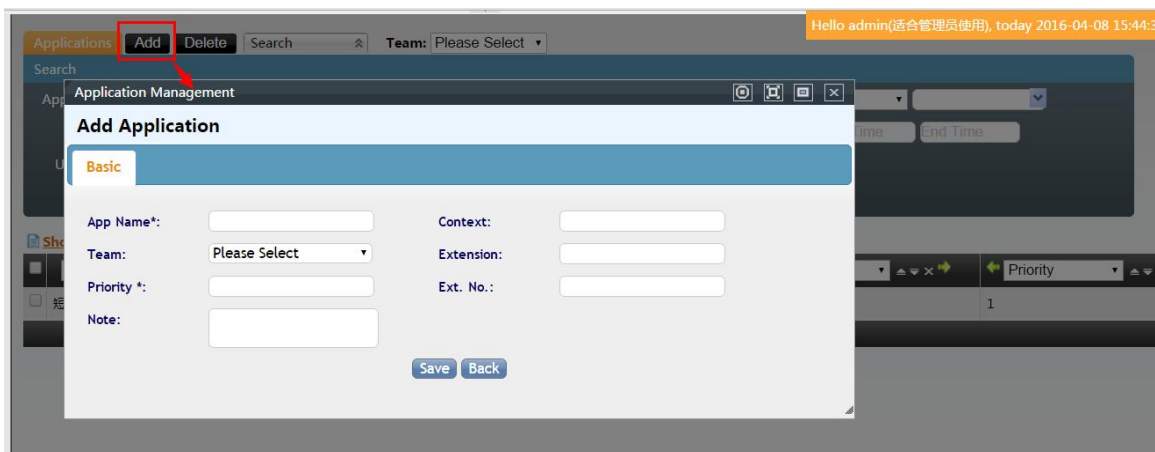
3.17.Applications

On the leftmenu,click[**Advanced**]-> [**Applications**],open the page



Add

Click [**Add**] button to open the Add Application page:



App Name: Name this application;

Context: The background of this application;

Team: To which team this application belongs to;

Extension: Set a start mark;

Priority: Set the priority level;

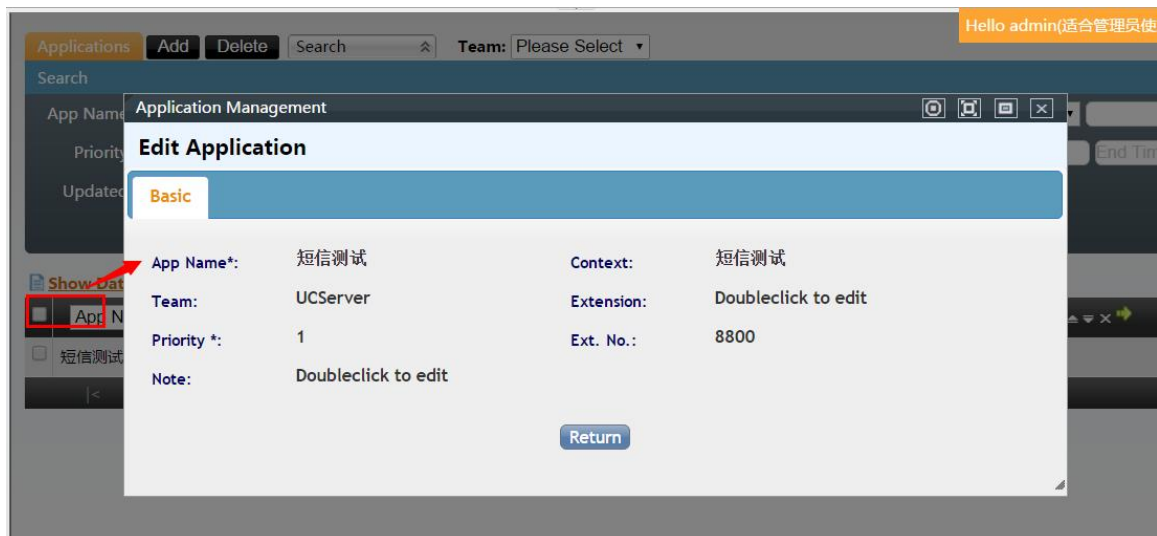
Ext.No.: Set an extension for this application;

Note: Give a note to this application

After finished the data,you can click the [Save] button to save the data.Then you can see the data shown in the list.

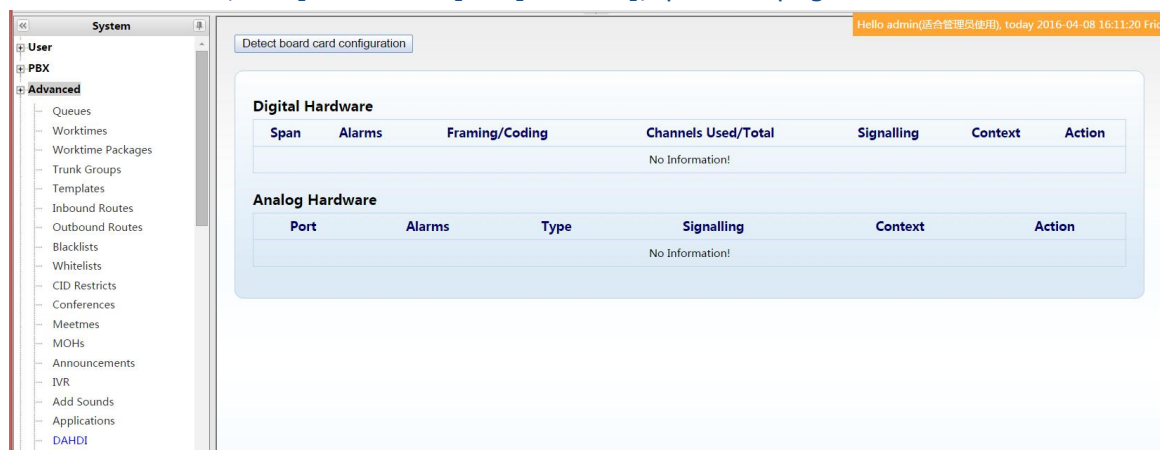
Edit

Double click the data,can open the edit page,then update the data.



3.18.DAHD

On the leftmenu,click[**Advanced**]-> [**DAHD**],open the page



Module Function: To edit the system hardware info, including Digital Hardware and Analog Hardware.

Digital Hardare Page:

Span: wanpipe 5

基本资料

Alarms:	OK	Channels:	30/4
Framing/Coding:	<input type="text"/>	Signalling:	PRI - CPE
Switchtype:	National ISDN 2 (defa	Sync/Clock Source:	0
Line Build Out:	0 db (CSU)/0-133 fee	Pridialplan:	National
Prilocaldialplan:	National	Group:	0
Context:	hosted-from-pstn	DID:	<input type="text"/>
Channels:	30	From: 1-15 , 17-30 Reserved: 16	
Status:	Enable	Advanced Settings: <div></div>	

保存 返回

Status: The status of this hardware

Group: Group for channels

Channels: Set Channel numbers for this hardware

Advanced Settings: To write advanced settings.

After saving the device information, a yellow banner shows up and asks for apply. Click it and make the set take effect.



Same steps for analog hardware settings.

3.19. BLF

Set BLF to detect extension status with busy light, such as 'ringing' and 'talking'

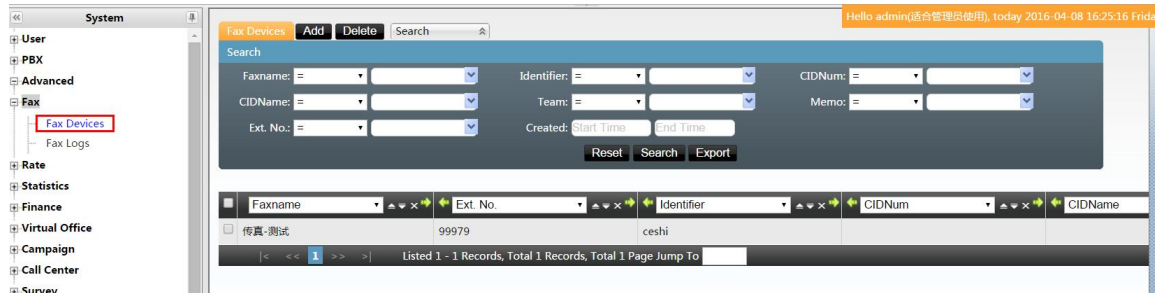
3.20. Voice Messages

3.21. Playback Messages

4. Fax

4.1 Fax Device

On the leftmenu, click **[Advanced]** -> **[Applications]**, open the page.



Module Function: To manage the sending and receiving function of fax device.

Click **【Add】** button to open the Add Fax page:

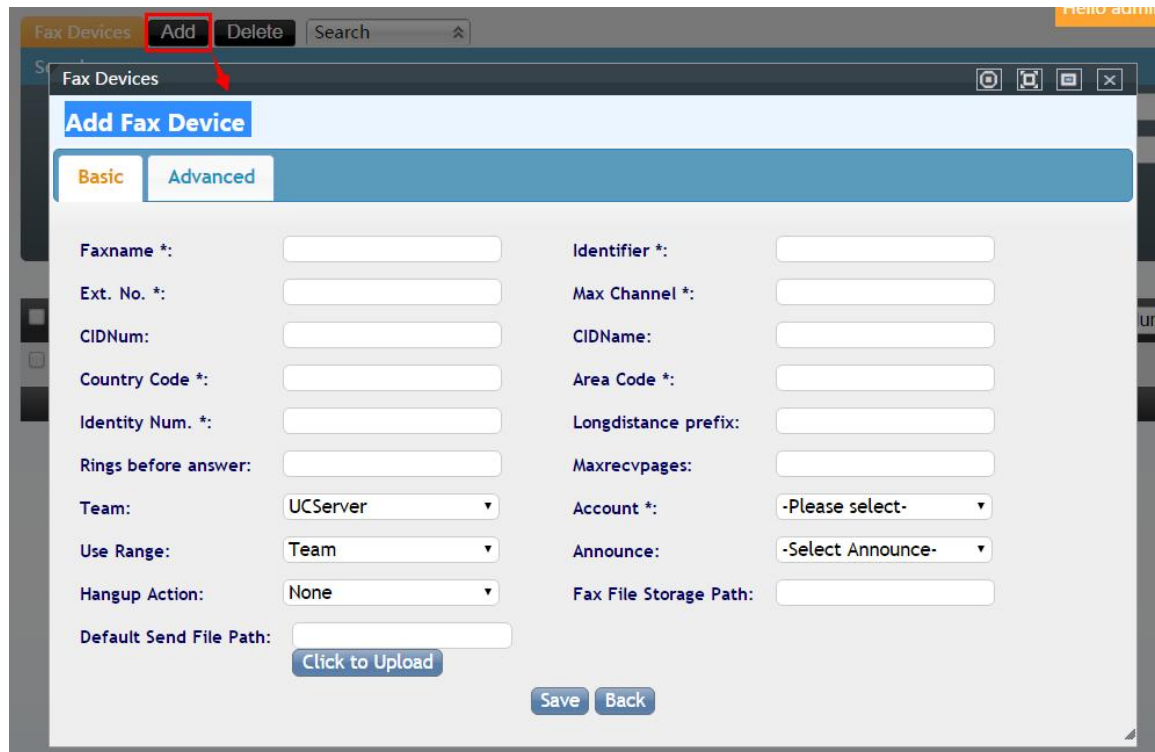
Faxname: Name this fax device

Identifier: The name which will show on the receiving side.

Ext.No:

Max Channel:

CIDNum:



CID Name:

Country Code:

Area Code:

Identity Num:

Longdistance Prefix:

Rings before answer:

Maxrecvpage:

Team: Which team this fax device belongs to

Account: The accounts can use this fax

Use Range:

Announce:

Hungup Action:

Fax file storage path:

Default send path:

Click Advanced to enter the advanced page:

Memo: Give a description to this device.

After finished the data, you can click the [Save] button to save the data. Then you can see the data shown in the list.

4.2 Fax Log

On the left menu, click [Advanced] -> [Fax Log], open the page.

The received fax are all listed here, you can download or delete them.

Download Fax	FAX Type	Extension	FAX	Src
<input type="checkbox"/> DOWNLOAD	AT		传真-测试	99979
<input type="checkbox"/> DOWNLOAD	MT	7003	传真-测试	99979
<input type="checkbox"/> DOWNLOAD	AT		传真-测试	99979
<input type="checkbox"/> DOWNLOAD	MT	7003	传真-测试	99979
<input type="checkbox"/> DOWNLOAD	MT	7003	传真-测试	99979
<input type="checkbox"/> DOWNLOAD	MT	7003	传真-测试	99979
<input type="checkbox"/> DOWNLOAD	AT		传真-测试	99979
<input type="checkbox"/> DOWNLOAD	AT		传真-测试	99979

5 Rate

5.1 Rate

System rate is used to count the call cost of every trunk and the total call cost of the system. When the outbound call trunk matches the trunk the system rate assigned, and the number dialed matches the rate rules, the system will calculate the cost of this call via the matched rate, and add up to the call cost of the trunk and the system.



Only system administrator can set the system rate

Click **[Rate]** → **[System rate]**, and it shows the current system rate list

Add system rate

Click "Add" to add a new piece of rate.

Rq

Required fields

- **Prefix:** The prefix of the called number which matches this rate. E.g., "0" for domestic long-distant dials, "00" for international numbers, "001" for American numbers, "default" for any number.
- **Billing block:** How often it bills.
- **Status:** Enable or disable the rate control.
- **Length:** We can rule by setting the length of the number, and "0" for no restriction.

Optional fields

- **Destination:** Name this rate, for example "local calls", "long distant calls" or "American"
- **Connect charge:** The rate once the call is connected
- **Init block:** The duration for the connect charge
- **Rate:** Rate per minute
- **Team:** The team this rate applies to. If leave it blank, this rate would apply to all teams. And during use, the system would priorly find the assigned rate of the team, and if nothing is found, then it will search for the unassigned rate.
- **Trunk:** The name of the trunk this rate applies to



- Entering *default* in the prefix means it matches all prefix.
- If the length is 0, it means it matches all lengths.
- Teams in a group actually have little meaning.
- If you do not choose a trunk, the cost will be added to cost record but no trunk cost will increase.
- The set of system rate has nothing to do with the in-use trunk selection, only to be used to count the call cost.
- Only when a trunk is used in the outbound calls, will the system find the corresponding rate in the system rate.

Edit system rate

Double click a rate to enter the edit page.

System Rates | Add | Delete | Search

Search

Prefix: Length: Dest:

Connect Charge

Billing Block

Show Data

Prefix

001

Rate Management

Edit Rate

Basic

Prefix*:	001	Length:	13
Dest.:	US	Connect Charge:	0.0000
Init Block:	0	Rate:	0.3000
Billing Block:	12	Status:	Enable
Team:	Please Select	Trunk:	po-33190727

Return

5.2 Team Rate

Team rate is the rate the system has sold the teams at, aka the calling cost.

Click[Rate]→ [Team rate]on the left to see the current team rate list.

Add team rate

Click **[Add]** to enter the add rate page.

Required fields

- **Prefix:** The prefix of the called number which matches this rate. E.g., "0" for domestic long-distant dials, "00" for international numbers, "001" for American numbers, "default" for any number.
- **Length:** We can rule by setting the length of the number, and "0" for no restriction.
- **Billing block:** How often it bills
- **Status:** Enable or disable the billing control

Optional fields

- **Destination:** Name this rate, for example "local calls", "long distant calls" or "American"
- **Connect charge:** The rate once the call is connected
- **Init block:** The duration for the connect charge
- **Rate:** Rate per minute

- **Team:** The team this rate applies to. If leave it blank, this rate would apply to all teams. And during use, the system would priorly find the assigned rate of the team, and if nothing is found, then it will search for the unassigned rate.
- **Trunk:** The name of the trunk this rate applies to



team rate is read only to team administrator

Edit rate

Click [Save] after finishing, the page will show the newly added the data. You can double click to open the edit page again to edit the data.

The screenshot shows the 'Rate Management' interface with an 'Edit Rate' dialog box open. The dialog has a 'Basic' tab and contains the following fields:

Prefix*	default	Length:	0
Destination:	Doubleclick to ...	Connect Charge:	0.0800
Init Block:	0	Rate:	0.0000
Billing Block:	60	Status:	Enable
Team:	UCServer	Trunk:	out-33199669

A red arrow points to the 'Prefix' dropdown menu in the background, which shows 'default' selected.

5.3 Customer Rate

Except for billing the device's outbound calls, it also selects trunk. The rate matching rule divides calls into corresponding trunks.

The order of trunk select:

1. account-level rate match
2. team-level rate match
3. system-level rate match

The order of rate match under the same rate level:

1. Prefix and length at the same time
2. Length match
3. Prefix match
4. Default rate match

Click[**Rate**]-> [**Customer rate**], and it shows all device rate.



- Login as the administrator, you will see all device rates under the team and the default device rate.
- The default rate is read only to the team.

Add device rate

Click **[Add]** to enter the add rate page.

The screenshot shows the 'Rate Management' window with the 'Add Rate' form. The 'Add' button in the top navigation bar is highlighted with a red box. The form has a 'Basic' tab selected. The fields are as follows:

Field	Value
Prefix*	default
Length	0
Destination	
Connect Charge	
Init Block	
Rate	
Billing Block	60
Status	Enable
Team	Please Select
Group	Please Select
Trunk	Please Select

Buttons: Save, Back

Required fields

- **Prefix:** The prefix of the called number which matches this rate. E.g., "0" for domestic long-distant dials, "00" for international numbers, "001" for American numbers, "default" for any number.
- **Rate:** Rate per minute
- **Billing block:** How often it bills, say the billing block is 60, means system will bill as 60 seconds even the call last 1 second.
- **Status:** If the rate is in use
- **Length:** We can rule by setting the length of the number, and "0" for no restriction.

Optional fields

- **Destination:** Name this rate, for example "local calls", "long distant calls" or "American"
- **Connect charge:** The rate once the call is connected
- **Init block:** The duration for the connect charge
- **Team:** The team this rate applies to. If leave it blank, this rate would apply to all teams. And during use, the system would priorly find the assigned rate of the team, and if nothing is found, then it will search for the unassigned rate.

- **Group:** Which group the changed rate applied to, if leave it unchosen, it means this rate will be applied to all groups.
- **Trunk:** The name of the trunk this rate applies to



- When add device rate, if do not choose a group, this rate will be applied to all groups.
- If the length is 0, it means it matches all lengths.
- Entering *default* in the prefix means it matches all prefix.

Edit device rate

Double click the rate to open the edit page.

Rate Management

Edit Rate

Basic

Prefix*:	default	Length:	0
Destination:	谢品	Connect Charge:	0.7000
Init Block:	0	Rate:	0.0000
Billing Block:	60	Status:	Enable
Team:	UCServer	Group:	谢品信息
Trunk:	Doubleclick to edit		

[Return](#)

5.4 Agent Rate

Agent rate is to bill the length of the agent answering incoming calls, thus no prefix and number length. By setting the agent inbound rate, every call an agent answered will gain the agent corresponding payment. This function is often used to calculate the payment of part-time agents.

Click[Rate]--> [Agent rate], entering the following page.

System

- User
- PBX
- Advanced
- Fax
- Rate
 - System Rates
 - Team Rates
 - Customer Rates
 - Agent Rates**
- Statistics

Rate Management

Agent Rate

Length: [] Destination: [] Connect Charge: []

Init Block: [] Rate: [] Billing Block: []

Agent No.: [] Group: [Please Select]

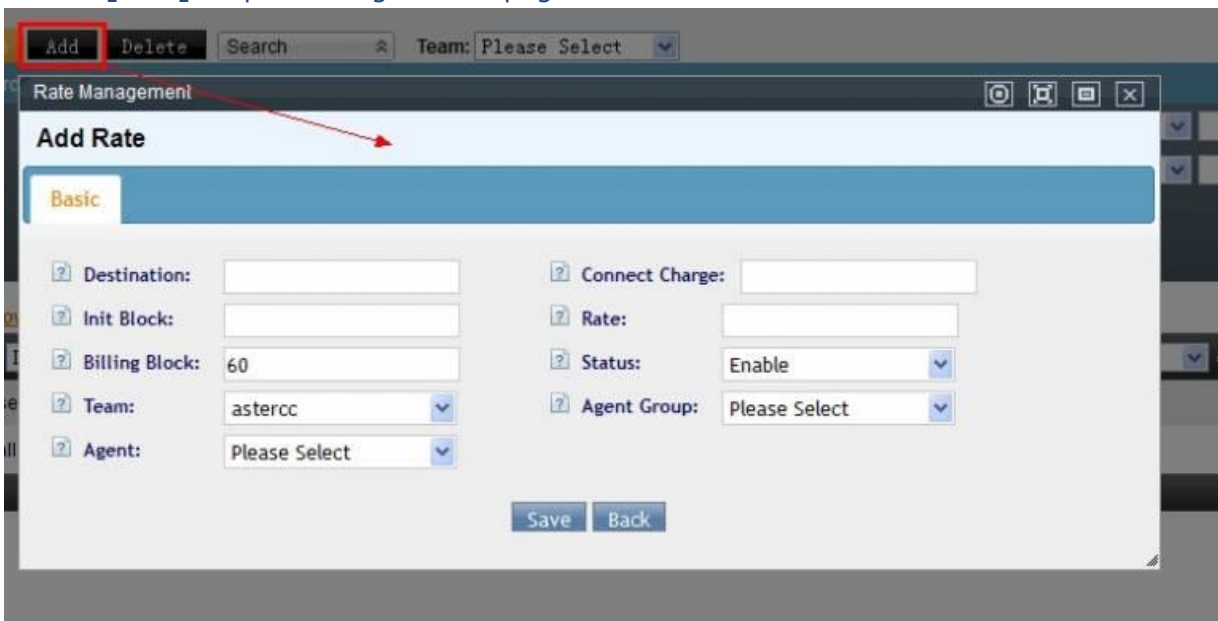
[Reset](#) [Search](#) [Export](#)

[Show Data](#) [Trash](#)

Destination	Connect Charge	Init Block	Rate	Billing Block
Listed 0 - 0 Records, Total 0 Records, Total 0 Page Jump To				

Add agent rate

Click **Add** to open the agent rate page.



Required field

- **Billing block:** How often it bills

Optional fields

- **Destination:** Name this rate, for example "local calls", "long distant calls" or "American"
- **Connect charge:** The rate once the call is connected
- **Init block:** The duration for the connect charge
- **Rate:** Rate per minute
- **Status:** Enable or disable the rate control
- **Team:** The team this rate applies to. If leave it blank, this rate would apply to all teams. And during use, the system would priorly find the assigned rate of the team, and if nothing is found, then it will search for the unassigned rate.
- **Agent group:** Where the agent rate is based on agent group, that is, different groups have different rates.
- **Agent:** You can also bill one or some specific agents in a group. Leaving it unchosen means it applies to the whole group.

The screenshot shows the 'Rate Management' window with the 'Add Rate' tab selected. The form contains the following fields:

Field	Value
Destination	
Init Block	
Billing Block	60
Team	UCServer
Agent	Please Select
Connect Charge	
Rate	
Status	Enable
Agent Group	Please Select

Buttons: Save, Back

Edit agent rate

Click[**Save**]when finishing the page, then it will show the newly added data on the page. You can double click the field to re-open the edit page and edit them.

The screenshot shows the 'Rate Management' window with the 'Edit Rate' tab selected. The form contains the following fields:

Field	Value
Destination	Doubleclick to ...
Init Block	0
Billing Block	60
Team	UCServer
Agent	Please Select
Connect Charge	0.0000
Rate	22.0000
Status	Enable
Agent Group	Please Select

Buttons: Return

6 Statistics

6.1 Agent Details

- Agent Details page is used to show statistics based agent, go to[**statistics**]→[**agent_details**]

System

User

PBX

Advanced

Fax

Rate

Statistics

Agent Details

IVR Details

Outbound Details

Inbound Details

Agent Group Details

Outbound

System

Import

Agent Group Graph

Agent Graph

Rate Log

Stats Number

Regional Report

Finance

today yesterday thisWeek thisMonth lastThreeMonth thisYear lastYear 2016-04-04 00:00:00 2016-04-10 23:59

Hello admin(适合管理员使用), today 2016-04-08 17:36:33

Select Team: Total

Agent Group: Total Agent: Total TimeMode: ByTotal View Export xls Selected Columns

Agent No.	AgentName	Agent Group	Calldate	Dialin Count
3333	3333	eason	2016-04-08	0
3332	3332	eason	2016-04-08	0
2867	2867	呼入客服坐席组	2016-04-08	5
2876	2876	呼入客服坐席组	2016-04-08	4
3333	3333	eason	2016-04-07	0
3332	3332	eason	2016-04-07	0
2867	2867	呼入客服坐席组	2016-04-07	4
2876	2876	呼入客服坐席组	2016-04-07	3
3333	3333	eason	2016-04-06	0
3332	3332	eason	2016-04-06	0

today yesterday thisWeek thisMonth lastThreeMonth thisYear lastYear 2016-04-04 00:00:00 2016-04-10 23:59

Hello admin(适合管理员使用), today 2016-04-08 17:37:34 Friday

Select Team: Total

Agent Group: Total Agent: Total TimeMode: ByTotal View Export xls Selected Columns

- Select the time range of the report
- Select how to list the result, view in page or export to excel/csv file

Statistics

- **Agent No.**
- **Agent Name:** Account Name in Agent →[advanced]
- **Agent Group**
- **Call Date**
- **Dialin Count:** calls agent received, include calls from customer or transferred from other agents
- **Dialin Answered Count:** calls agent answered
- **Avg. Dialin Answered:** average talking time for inbound calls
- **Avg. Dialin Ringing:** average ringing time for inbound calls
- **Dialin Talking Duration:** total talking time for inbound calls
- **Dialin Duration:** total duration for inbound calls, including ringing
- **Dialout Count:** calls agent made
- **Dialout Answered Count:** calls agent made and answered
- **Avg. Dialout Answered:** average talking time for outbound calls
- **Avg. Dialout Ringing:** average ringing time for outbound calls
- **Dialout Talking Duration:** total talking time for outbound calls
- **Dialout Duration:** total outbound calls duration
- **Dialin Consult Count:**total consult times for inbound calls
- **Avg. Dialin Consult:** average consult duration for inbound calls
- **Dialout Consult Count:** total consult times for outbound calls
- **Avg. Dialout Consult:** average consult duration for outbound calls

- **Dialin Conf Count:** total conference times for inbound calls
- **Avg. Dialin Conf:** average conference duration for inbound calls
- **Dialout Conf Count:** total conference times for outbound calls
- **Avg. Dialout Conf:** average conference times for outbound calls
- **Dialin Transfer Count:** transferred times for inbound calls
- **Dialout Transfer Count:** transferred times for outbound calls
- **ACW Count:** total ACW times
- **ACW Duration:** total ACW duration
- **Avg. ACW Duration:** average ACW duration
- **Onhold Count:** total times when agent put customer on hold
- **Avg. Onhold Duration:** average onhold duration
- **Login Duration:** total agent login duration
- **Check-in Duration:** total agent check-in duration
- **Check-in Duration/8:** usually agent will work 8 hrs per day, this is used to get the percentage of check-in time
- **Busy Duration:** duration when agent pause himself
- **Busy Percentage:** (Busy Duration / Check-in duration) x 100%
- **Lunch break Pause:** duration when agent pause himself as lunch break
- **Meeting Pause:** duration when agent pause himself as meeting
- **Rest Pause:** duration when agent pause himself as rest
- **Leave of absence Pause:** duration when agent pause himself as leave of absence
- **Training Pause:** duration when agent pause himself as training
- **Other Pause:** duration when agent pause himself as other
- **Auto Pause:** duration when agent is paused by system, this will happen when agent group enabled auto pause
- **Admin Pause:** duration when agent is paused by admin
- **Work Rate:** (talking duration + ACW duration)/login duration x 100%
- **Busy Rate:** (ringing duration + talking duration + ACW duration)/login duration x 100%
- **Efficiency:** (ringing duration + talking duration + ACW duration)/(login duration - pause duration) x 100%
- **Onhold Rate:** onhold count/(dialin count + dialout count) x 100%
- **Dialin Transfer Rate:** dialin transfer count/dialin answered count x 100%
- **Dialout Consult Rate:** dialout consult count/dialin answered count x 100%

6.2 IVR Details

On the leftmenu,click[**Statistics**]-> [**IVR Details**],open the page

System

today yesterday thisWeek thisMonth lastThreeMonth thisYear lastYear 2016-04-08 00:00 2016-04-08 23:59

Select Team: Please Select Business Type: Total View export xls

StartTime	EndTime	Duration	IvrStatus	Src	Dst	EndStatus	TeamName
2016-04-08 17:34:41	2016-04-08 17:34:52	00:00:11	normal	057185028228	33199669	ivr hangup when action	UCServer
2016-04-08 16:35:59	2016-04-08 16:36:14	00:00:15	normal	18016468686	2867	ivr to extension	UCServer
2016-04-08 15:17:30	2016-04-08 15:17:39	00:00:09	normal	80233630	33199669	ivr hangup when action	UCServer
2016-04-08 14:36:53	2016-04-08 14:37:03	00:00:10	normal	38919137	2867	ivr to extension	UCServer
2016-04-08 14:20:20	2016-04-08 14:20:39	00:00:19	normal	13816000832	2867	ivr to extension	UCServer
2016-04-08 13:18:05	2016-04-08 13:18:14	00:00:09	normal	80215791	2867	ivr to extension	UCServer
2016-04-08 13:17:22	2016-04-08 13:17:27	00:00:05	normal	51827576	2868	ivr to extension	UCServer
2016-04-08 13:16:34	2016-04-08 13:17:00	00:00:26	normal	80215704	33199669	ivr to extension	UCServer
2016-04-08 12:02:35	2016-04-08 12:02:51	00:00:16	normal	18918650403	2867	ivr to extension	UCServer
2016-04-08 10:33:20	2016-04-08 10:33:26	00:00:06	normal	15651832265	2870	ivr to extension	UCServer

Module Function: To check the IVR Status

System

today yesterday thisWeek thisMonth lastThreeMonth thisYear lastYear 2016-04-08 00:00 2016-04-08 23:59

Select Team: Please Select Business Type: Total View export xls

- Select the time range of the report
- Select how to list the result, view in page or export to excel/csv file

Statistics

- **Start Time:** ivr starts time;
- **EndTime:** ivr ends time;
- **Duration:** the duration of this IVR
- **Ivr Status:** ivr status
- **EndStatus:** What action the system takes when IVR ends;

6.3 Outbound Details

On the leftmenu,click[Statistics]-> [Outbound Details],open the page

System

today yesterday thisWeek thisMonth lastThreeMonth thisYear lastYear 2016-04-04 00:00 2016-04-10 23:59 View export

SelectTeam: Total Object: agent

AgentNo	AgentName	src	dst	StartTime	EndTime	RingTime	Billsec	TotalTime	EndStatus
2876	2876	2876	61436290	2016-04-08 17:42:17	2016-04-08 17:42:53	00:00:04	00:00:32	00:00:36	
2876	2876	2876	61436296	2016-04-08 17:41:49	2016-04-08 17:42:00	00:00:05	00:00:06	00:00:11	
2876	2876	2876	4000805170	2016-04-08 17:28:36	2016-04-08 17:31:54	00:00:10	00:03:08	00:03:18	
2867	2867	2867	2865	2016-04-08 16:16:08	2016-04-08 16:16:23	00:00:03	00:00:12	00:00:15	
2867	2867	2867	18616201690	2016-04-08 16:04:43	2016-04-08 16:07:29	00:00:15	00:02:31	00:02:46	
2867	2867	2867	2865	2016-04-08 15:45:46	2016-04-08 15:46:34	00:00:09	00:00:39	00:00:48	
2876	2876	2876	2865	2016-04-08 15:12:45	2016-04-08 15:12:48	00:00:03	00:00:00	00:00:03	
2876	2876	2876	018021248890	2016-04-08 11:36:32	2016-04-08 11:37:12	00:00:10	00:00:30	00:00:40	
2876	2876	2876	18021248890	2016-04-08 11:36:18	2016-04-08 11:36:21	00:00:03	00:00:00	00:00:03	
2876	2876	2876	018221248890	2016-04-08 11:36:04	2016-04-08 11:36:07	00:00:03	00:00:00	00:00:03	
total						ringsectotal	billsectotal	durationtotal	count
						00:14:10	01:50:14	02:04:25	108

Module Function: the outbound calls details

System

today yesterday thisWeek thisMonth lastThreeMonth thisYear lastYear 2016-04-04 00:00 2016-04-10 23:59 View export

SelectTeam: Total Object: agent

- Select the time range of the report
- Select how to list the result, view in page or export to excel/csv file

Statistics

- **Start Time:** outbound call starts time;
- **EndTime:** outbound call ends time;
- **Ringtime:**

If calls established, ringtime=answered time-start time

If calls fails, ringtime=end time-start time

- **Duration:** the duration of this call
- **Total time:** The length from ringing to call hungups.
- **EndStatus:** What action the system takes when call ends;

6.4 Inbound Details

On the left menu,click[**Statistics**]-> [**Inbound Details**],open the page

AgentNo	AgentGroupName	AgentName	src	dst	StartTime	EndTime	IvrDuration	QueueTime	RingTime	Billsec	TotalTime
2867	呼入客服坐席组	2867	18016468686	2867	2016-04-08 16:35:59	2016-04-08 16:37:22	00:00:15	00:00:00	00:00:06	00:01:02	00:01:23
2876	呼入客服坐席组	2868	65963999	2868	2016-04-08 16:01:58	2016-04-08 16:05:43	00:00:00	00:00:00	00:00:04	00:03:41	00:03:45
2876	呼入客服坐席组	2879	65963999	2879	2016-04-08 15:37:57	2016-04-08 15:39:25	00:00:00	00:00:00	00:00:05	00:01:23	00:01:28
2867	呼入客服坐席组	2867	38919137	2867	2016-04-08 14:36:53	2016-04-08 14:39:28	00:00:10	00:00:00	00:00:05	00:02:20	00:02:35
2876	呼入客服坐席组	2879	65963999	2879	2016-04-08 14:32:01	2016-04-08 14:37:21	00:00:00	00:00:00	00:00:05	00:05:15	00:05:20
2867	呼入客服坐席组	2867	13816000832	2867	2016-04-08 14:20:20	2016-04-08 14:21:57	00:00:19	00:00:00	00:00:05	00:01:13	00:01:37
2867	呼入客服坐席组	2867	80215791	2867	2016-04-08 13:18:05	2016-04-08 13:21:52	00:00:09	00:00:00	00:00:03	00:03:35	00:03:47
2867	呼入客服坐席组	2867	18918650403	2867	2016-04-08 12:02:35	2016-04-08 12:05:42	00:00:16	00:00:00	00:00:07	00:02:44	00:03:07
2876	呼入客服坐席组	2868	057585354954	2868	2016-04-08 09:32:16	2016-04-08 09:32:26	00:00:00	00:00:04	00:00:17	00:00:06	00:00:10
2867	呼入客服坐席组	2867	61081888	2867	2016-04-07 16:45:16	2016-04-07 16:47:25	00:00:14	00:00:00	00:00:08	00:01:47	00:02:09

Module Function: the inbound calls details

today yesterday **thisWeek** thisMonth lastThreeMonth thisYear lastYear 2016-04-04 00:00 2016-04-10 23:59 View export

xls

SelectTeam: Total Object: agent

- Select the time range of the report
- Select how to list the result, view in page or export to excel/csv file

Statistics

- **StartTime:** Count from ringing;
- **EndTime:** The calls end time;
- **IVR Duration:** StartTime-customer enter IVR time;
- **Queue Time:** How long a customer waits for agent picking up the call;
- **Ringtime:**

If calls established, ringtime=answered time-start time

If calls fails, ringtime=end time-start time

- **Duration:** the duration of this call
- **Total time:** The length from ringing to call hungups.

- **EndStatus:** What action the system takes when call ends;

6.5 Agent Group Details

Agent group details is used to show statistics for a given agent group, go to **[Statistics]** → **[Agent Group Details]**

The screenshot shows the 'Agent Group Details' page in the EQUINET VINA-PBX system. The left sidebar contains a tree view with categories: User, PBX, Advanced, Fax, Rate, Statistics, Finance, and Virtual Office. Under 'Statistics', 'Agent Group Details' is selected. The main content area displays a table of statistics for the 'Total' team, filtered by 'thisMonth' (April 2016). The table has five columns: AgentGroupName, StartTime, Dialincount, dialinansweredcount, and DialinAnsRate. The data is sorted by StartTime in descending order.

AgentGroupName	StartTime	Dialincount	dialinansweredcount	DialinAnsRate
呼入客服坐席组	2016-04-09	2	0	0%
eason	2016-04-09	0	0	0%
呼入客服坐席组	2016-04-08	10	5	50%
eason	2016-04-08	0	0	0%
呼入客服坐席组	2016-04-07	7	6	86%
eason	2016-04-07	0	0	0%
呼入客服坐席组	2016-04-06	10	7	70%
eason	2016-04-06	0	0	0%
外呼营销坐席组	2016-04-05	0	0	0%
eason	2016-04-05	0	0	0%

- Select the time range of the report
- Select how to list the result, view in page or export to excel/csv file

Statistics

- **Dialincount:** Total number of inbound calls
- **Dialinansweredcount:** Answered calls number of inbound calls
- **DialinAnsRate:** $(\text{Dialinansweredcount} / \text{Dialincount}) \times 100\%$
- **DialinAvgSec:** Agent Talking/Dialincount
- **AgentRingAvgSec:** Inbund Ringing/Dialincount
- **AvgQueueSec:** Waiting time of answered calls/Dialinansweredcount
- **AnsweredIn10Rate:**

$$\text{AnsweredIn10Rate} / (\text{AnsweredIn10Rate} + \text{AnsweredIn20Rate} + \text{AnsweredIn30Rate} + \text{AnsweredIn60Rate} + \text{AnsweredOut60Rate})$$
- **AnsweredIn15Rate:**

$$(\text{AnsweredIn10Rate} + \text{AnsweredIn15Rate}) / (\text{AnsweredIn10Rate} + \text{AnsweredIn20Rate} + \text{AnsweredIn30Rate} + \text{AnsweredIn60Rate} + \text{AnsweredOut60Rate})$$
- **AnsweredIn20Rate:**

$$(\text{AnsweredIn10Rate} + \text{AnsweredIn15Rate} + \text{AnsweredIn20Rate}) / (\text{AnsweredIn10Rate} + \text{AnsweredIn20Rate} + \text{AnsweredIn30Rate} + \text{AnsweredIn60Rate} + \text{AnsweredOut60Rate})$$

- **AnsweredIn30Rate:**

$$\frac{(\text{AnsweredIn10Rate} + \text{AnsweredIn15Rate} + \text{AnsweredIn20Rate} + \text{AnsweredIn30Rate})}{(\text{AnsweredIn10Rate} + \text{AnsweredIn20Rate} + \text{AnsweredIn30Rate} + \text{AnsweredIn60Rate} + \text{AnsweredOut60Rate})}$$
- **AnsweredIn60Rate:**

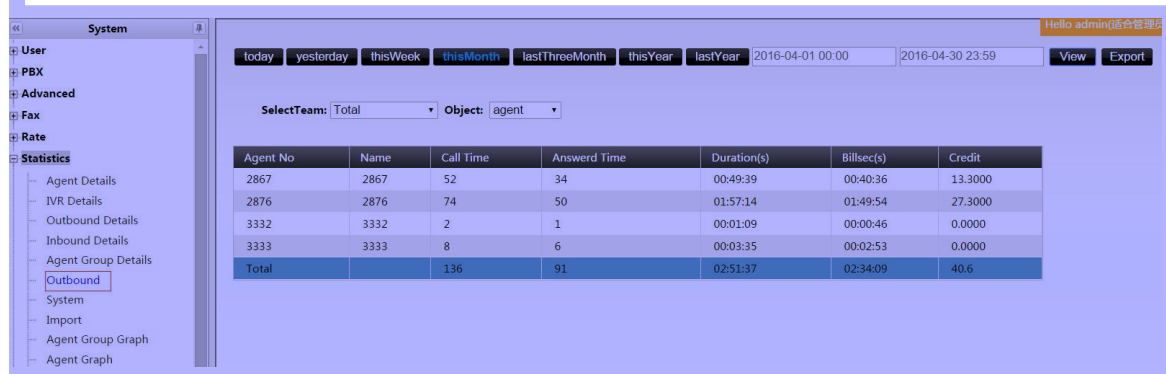
$$\frac{(\text{AnsweredIn10Rate} + \text{AnsweredIn15Rate} + \text{AnsweredIn20Rate} + \text{AnsweredIn30Rate} + \text{AnsweredIn60Rate})}{(\text{AnsweredIn10Rate} + \text{AnsweredIn20Rate} + \text{AnsweredIn30Rate} + \text{AnsweredIn60Rate} + \text{AnsweredOut60Rate})}$$
- **AnsweredOut60Rate:**

$$\frac{\text{AnsweredOut60Rate}}{(\text{AnsweredIn10Rate} + \text{AnsweredIn20Rate} + \text{AnsweredIn30Rate} + \text{AnsweredIn60Rate} + \text{AnsweredOut60Rate})}$$
- **Dialinbillsec:** ringing and talking time of inbound calls
- **Dialoutcount:** total number of outbound calls
- **Dialoutansweredcount:** answered calls number in outbound calls
- **DialoutAnsRate:** $\text{Dialoutansweredcount} / \text{Dialoutcount} \times 100\%$
- **DialoutAvgRingSec:** Total ring duration of outbound calls / Dialoutcount
- **DialoutAvgAnswerSec:** Total answered time of outbound calls / Dialoutansweredcount
- **DialoutBillsec:** Total answered time of outbound calls
- **Dialinconsultcount:** Total agent consult number of inbound calls
- **Dialoutconsultcount:** Total agent consult number of outbound calls
- **Dialinconfcount:** Total agent conference number of inbound calls
- **Dialoutconfcount:** Total agent conference number of outbound calls
- **followupcount:** Total number of ACW
- **followupsecAvg:** Average duration of ACW
- **onholdcount:** Total number when agent put a call on hold
- **onholdsecAvg:** Average onhold duration
- **giveupcount:** Total number of abandon calls
- **dialingiveupAvg:** Average waiting time for abandon calls in inbound calls,
- **giveuprate:** $\text{giveupcount} / \text{dialincount} \times 100\%$
- **dialintransfer:** total transfer number for inbound calls
- **dialouttransfer:** total transfer number for outbound calls
- **dialintransferrate:** $\text{dialintransfer} / \text{Dialinansweredcount} \times 100\%$
- **dialinconsultrate:** $\text{Dialinconsultcount} / \text{Dialinansweredcount} \times 100\%$
- **dialinconftrate:** $\text{Dialinconfcount} / \text{Dialinansweredcount} \times 100\%$
- **onholdrate:** $\text{onholdcount} / \text{Dialinansweredcount} \times 100\%$
- **dialinspeedAvg:** Total waiting time/dialinansweredcount
- **callhandleAvg:** total talking time + total ACW time / dialinansweredcount

- **dialinavgringvolume**: total ringing time of answered calls / dialinansweredcount

6.6 Outbound

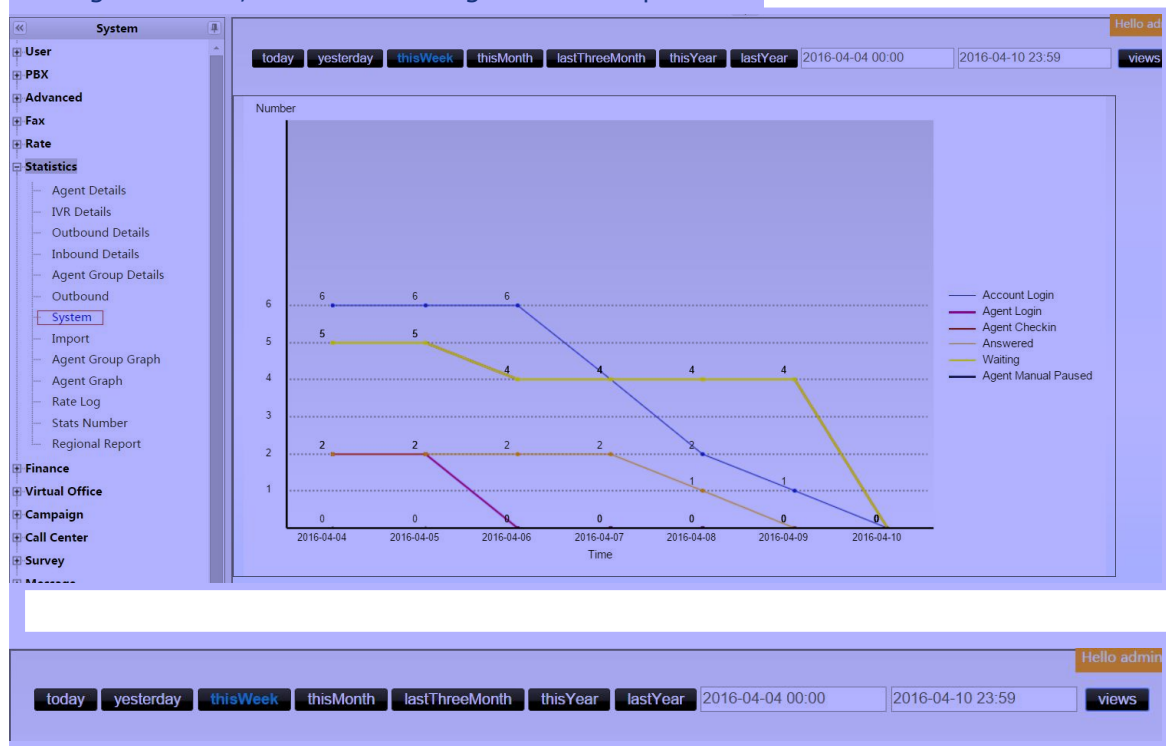
On the leftmenu,click[**Statistics**]-> [**Outbound**],open the page



Module Function: To check agent's workload

6.7 System

On this page,can choose a period of time to view the system data,include the amount of account login, the amount of agent login, the amount of answered customer, the amount of waiting customer,the amount of agent manual paused.



- Select how to list the result, view in page or export to excel/csv file

If the selected time period is one day, then the statistical data will be five minutes as a time point for statistics



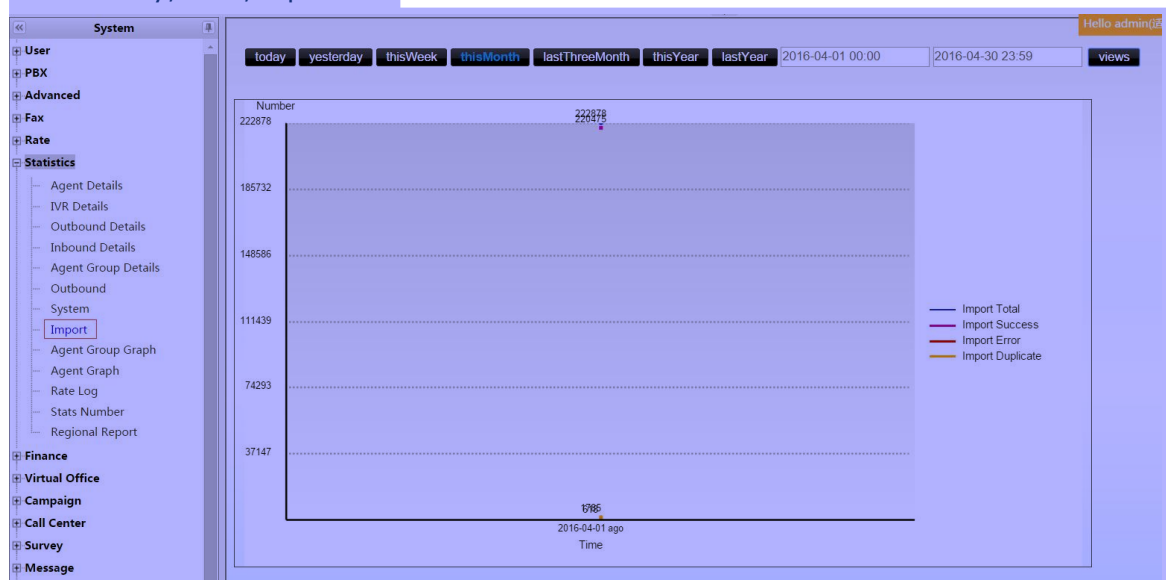
If the selected time period is over one day, but in one year, then the statistical data will be one day as a time point for statistics

If the selected time period is over one year, then the statistical data will be one year as a time point for statistics

- **Account Login** : how many account login the system when every time point
- **Agent Login** : How many agent login the system to work. The agent need to use the account to login the system, so the amount of agent login is included in the amount of account login.
- **Agent Checkin** : how many agent login the queue
- **Answered** : How many customer are talking with the agent
- **Waiting** : There are no more idle agent to answer the calls, so the customers are waiting to be answered
- **Agent Manual Paused** : How many the agent click pause button to pause manually

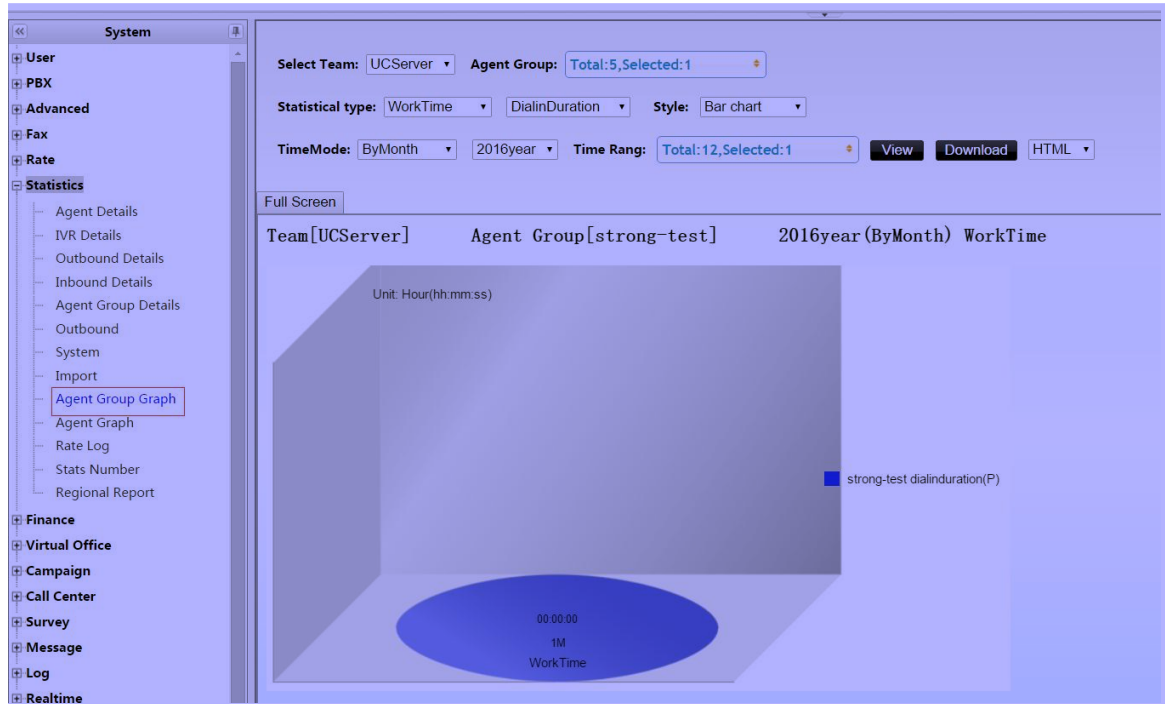
6.8 Import

On the left menu, click **[Statistics]** -> **[Import]**, open the page
Statistic amount of import which range a time, and amount of import successfully, error, duplicate.



6.9 Agent Group Graph

On the left menu, click **[Statistics]** -> **[Agent Group Graph]**, open the page



Module Function: To check an agent group's workload.

Select Team: UCServer Agent Group: Total:5,Selected:1

Statistical type: WorkTime ConsultSec Style: Linear graph

TimeMode: ByHour 2016year April 19day Time Rang: Total:24,Selected:1 View Download HTML

Select Team: Select a team to check its graph;

Statistical Type: There are six options available, work time, call volume, work rate,ave volume,service level;

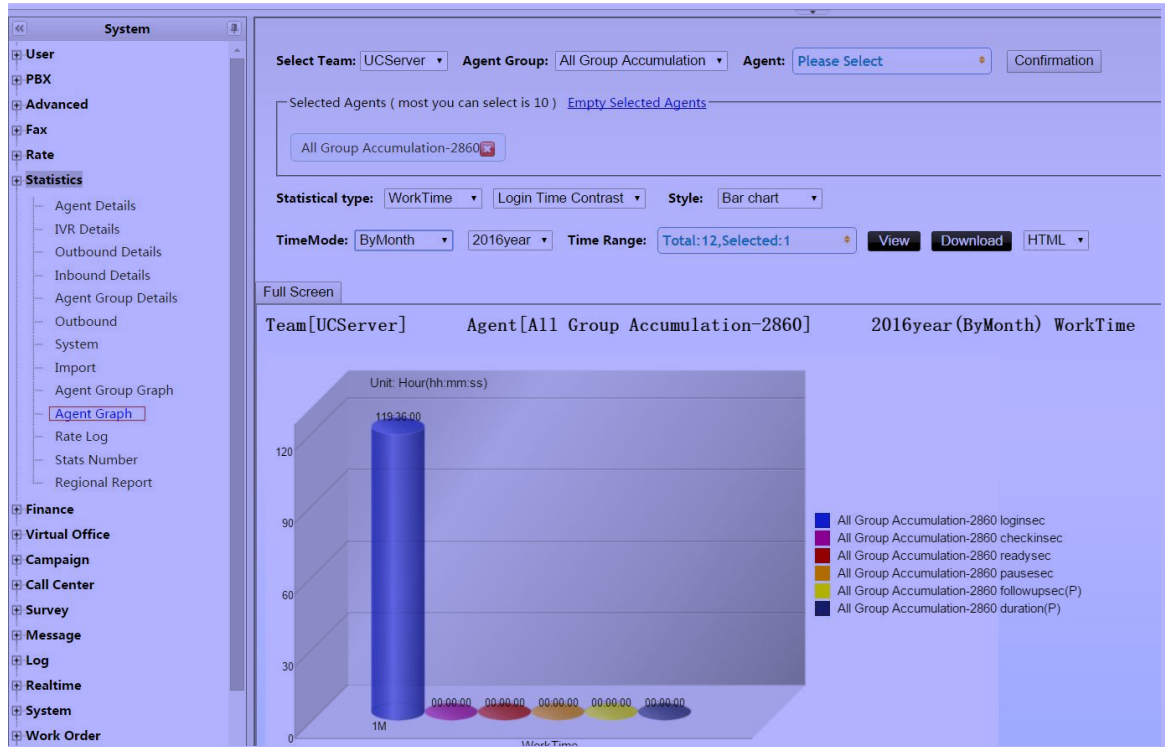
Style: How to show these statistic, bar chat or linear graph;

Time Mode: Select the time range of the report

Download: The statistics can be download in HTML, Image,or PDF
Click View to view in page.

6.10 Agent Graph

On the leftmenu,click[Statistics]-> [Agent Graph],open the page



Module Function: To check a team's agent workload.

Select Team: UCServer Agent Group: Total:5,Selected:1

Statistical type: WorkTime ConsultSec Style: Linear graph

TimeMode: ByHour 2016year April 19day Time Rang: Total:24,Selected:1 View Download HTML

Select Team: Select a team to check its graph;

Statistical Type: There are six options available, work time, call volume, work rate,ave volume,service level;

Style: How to show these statistic, bar chat or linear graph;

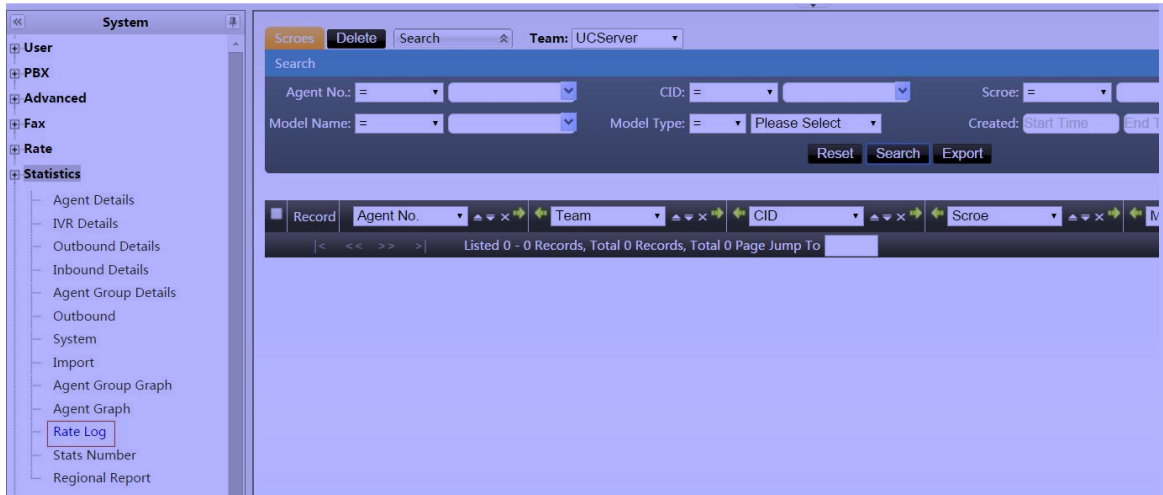
Time Mode: Select the time range of the report

Download: The statistics can be download in HTML, Image,or PDF.

Click View to view in page.

6.11 Rate Log

On the leftmenu,click[Statistics]-> [Rate Log],open the page



Module Function: Check a group's rate log;

6.12 Stats Number

On the leftmenu,click[**Statistics**]-> [**Stats Number(DID Statistic?)**],open the page



Module Function: To check the use of DID.

Select the DID numbers and the time range, then click View to check the statistics:



6.13 Regional Report

On the leftmenu,click[**Statistics**]-> [**Regional Report**],open the page

The screenshot shows the 'Statistics' menu on the left, with 'Regional Report' selected. The main area displays a table of DID usage for the team 'UCServer' on 2016-04-09. The table has columns for DID, Province, City, Calls, and Percent.

DID	Province	City	Calls	Percent
2222	Total		0	100%
2669	Total		0	100%
2803	Total		0	100%
2805	Total		0	100%
2868	Total		0	100%
2876	Total		0	100%
2898	Total		0	100%
33190388	Total		0	100%
33190727	浙江	嘉兴	1	50.0%
33190727	江苏	扬州	1	50.0%
33190727	Total		2	100%
33191588	Total		0	100%
33192039	Total		0	100%
33197300	Total		1	100.0%
33197300	Total		1	100%
33199669	江西	南昌	1	50.0%
33199669	浙江	杭州	1	50.0%
33199669	Total		2	100%

Module Function: To check the use of DIDs in a region

The screenshot shows the 'Statistics' menu on the left, with 'Regional Report' selected. The main area displays a table of DID usage for the team 'All' on 2016-04-10. The table has columns for DID, Province, City, Calls, and Percent.

DID	Province	City	Calls	Percent
2222	Total		0	100%
2669	Total		0	100%
2803	Total		0	100%
2805	Total		0	100%
2868	Total		0	100%
2876	Total		0	100%
2898	Total		0	100%
33190388	Total		0	100%
33190727	浙江	嘉兴	1	50.0%
33190727	江苏	扬州	1	50.0%
33190727	Total		2	100%
33191588	Total		0	100%
33192039	Total		0	100%
33197300	Total		1	100.0%
33197300	Total		1	100%
33199669	江西	南昌	1	50.0%
33199669	浙江	杭州	1	50.0%
33199669	Total		2	100%

- Choose a team, select the call Type(Dialin/Dialout), select the DID , the province and city.
- Select how to list the result, view in page or export to excel/csv file

7 Finance

7.1 Adjust Payment

On the left menu, click **[Finance]** -> **[Adjust Payment]** to open the page

The screenshot shows the 'Adjust Payments' page. It includes a search bar with fields for Credit, Agent No., and Bill Type. Below the search bar is a table with columns for Agent No., Credit, Bill Type, Month, and Credit Before. The table shows one record for Agent No. 2863 with a Credit of 1000.00 and a Bill Type of Add.

Agent No.	Credit	Bill Type	Month	Credit Before
2863	1000.00	Add	0	0.00

Add Payment

Click **[Add]** to enter the add payment page.

Adjust Payments Add Delete Search

Search

Adjust Payments

Adjust Payment

Basic

Team: Please Select Agent Group: Please Select

Agent No.: Please Select Last Name:

Bank Account: Bank Account Name:

Pay Credit: Credit *:

Save Back

Module Function: to adjust agent's credit
Required fields

- **Team:** Select a team, then agent groups belong to this team will show up.

Adjust Payments

Adjust Payment

Basic

Team: UCServer Agent Group: strong-test

Agent No.: 2800 Username: 2800

Last Name: 2800 Bank Name:

Bank Account: Bank ZIP:

Bank Account Name: Balance: 0.00

Pay Credit: 0.00 Bill Type: Add

Credit *: Memo: Add Reduce

Save Back

- **Agent Group:** Select the agent group, then the agent numbers belong to this group will list up.
- **Agent No.:** Select an agent No. which needs adjust the credit.
- **Bill Type:** There two kinds of bill, add or reduce.
- **Credit:** How much credit will be adjusted

Optional Fields

- **Credit:** How much credit will be adjusted
- **Memo:** Give a memo to this adjustment;

Note:

The team, agent group and agent No. are related values.

In addition, if login with team leader account, there will be only one team showing under Team field, that is the team which the account belongs to.

- **Bank Name:** The bank name of the agent(for part-time agent)
- **Bank Account**
- **Bank Zip**
- **Bank Account Name**

After finished the data,you can click the [Save] button to save the data.Then you can see the data shown in the list.The listed data can not be modified or changed by double clicking.

7.2 Agent Summarizies

On the leftmenu,click[**Finance**]-> [**Agent Summarizies**] to open the page

- Select the time range of the report,and the agent group;
- Select how to list the result, view in page or export to excel/csv file

7.3 Credit Statistics

On the leftmenu,click[**Finance**]-> [**Credit Statistics**] to open the page

Module Function: To check the credit status of accounts and teams;

- **Form Style:** Which way you would like to view the credit statistics, table form or chat form.
- **Select Team:**To select the target teams;
- **Select Account:** To select the target accounts;
- **Search By Time:** To define the time,by total,by year,by month or by day;
- Select the time range of the report to view it.

7.4 System Invoice

On the left menu, click **[Finance]** -> **[System Invoice]** to open the page

The screenshot displays the 'System Invoices' page. On the left is a sidebar menu with categories like User, PBX, Advanced, Fax, Rate, Statistics, Finance, Virtual Office, Campaign, Call Center, Survey, Message, Log, Realtime, System, and Work Order. The 'Finance' category is expanded, showing sub-items: Adjust Payments, Agent Summaries, Credit Statistics, System Invoices (highlighted), and Account Invoices. The main content area has a search bar and filters for 'Creby', 'Statement startdate', 'Statement enddate', and 'Invoicedate'. Below these is a table of invoices with columns for dates, Creby, and actions (View, Send). The table shows 10 records, with a footer indicating 'Listed 1 - 10 Records, Total 41 Records, Total 5 Page Jump To'.

Statementsstartdate	Statementenddate	Invoicedate	Creby	Bill	Mail To Mailbox
2016-03-01	2016-03-31	2016-04-01	Shell-bill	View	Send
2016-03-01	2016-03-31	2016-04-01	Shell-bill	View	Send
2016-03-01	2016-03-31	2016-04-01	Shell-bill	View	Send
2016-02-01	2016-02-29	2016-03-01	Shell-bill	View	Send
2016-02-01	2016-02-29	2016-03-01	Shell-bill	View	Send
2016-02-01	2016-02-29	2016-03-01	Shell-bill	View	Send
2016-01-01	2016-01-31	2016-02-01	Shell-bill	View	Send
2016-01-01	2016-01-31	2016-02-01	Shell-bill	View	Send
2016-01-01	2016-01-31	2016-02-01	Shell-bill	View	Send
2015-12-01	2015-12-31	2016-01-01	Shell-bill	View	Send

Module Function: If you enable the invoice function, then the system will generate a system invoice for you. You can check your invoice online or email to a mailbox. All the system administrators' invoice will show on the front page. Please click **[View]** to check online or **[Send]** to send to default mailbox.



电子账单

admin

Admin账单总结

账单日 Statement Date	本期应还金额 Current Balance
2012-04-4~2012-05-4	-2119

姓名 Name	电话号码 Phone number	地址 Address	电子邮箱 E-mail
admin			

账单打印日期 Invoice Date: 2012-05-14 账单日 Statement Date: 2012-04-4~2012-05-4
 到期还款日 Payment Due Date: 2012-05-10

团队名称 Team Name	费用 Credit	成本 Cost
	966	0

本期应还金额 Current Balance : ￥-2119

本期应还金额 Current Balance	=	上期账单金额 Balance B/F	-	上期支付金额 Payment	+	本期账单金额 New Charges	+	本期调整金额 Adjustment	+	利息 Interest
￥-2119		￥-2119		￥0		￥0		￥0		￥0

月租费 Monthly fee :	￥0.00	外呼 DialOut :	￥0
呼入 DialIn :	￥0.00	其他 Other :	无

7.5 Team Invoices

On the left menu, click **[Finance]** -> **[System Invoice]** to open the page

System

Team Invoices Search

Search

Creby: Teamname: StatementStartDate: End Time

StatementEndDate: Invoicedate: End Time

Reset Search

StatementStartDate	StatementEndDate	Invoicedate	Teamname	Please Select	Bill	Mail To Mailbox
2016-03-01	2016-03-31	2016-04-01	GMS		View	Send
2016-03-01	2016-03-31	2016-04-01	andy测试		View	Send
2016-03-01	2016-03-31	2016-04-01	andy测试		View	Send
2016-03-01	2016-03-31	2016-04-01	andy测试		View	Send
2016-03-01	2016-03-31	2016-04-01	UCServer		View	Send
2016-03-01	2016-03-31	2016-04-01	UCServer		View	Send
2016-02-01	2016-02-29	2016-03-01	null		View	Send
2016-02-01	2016-02-29	2016-03-01	null		View	Send
2016-02-01	2016-02-29	2016-03-01	null		View	Send
2016-02-01	2016-02-29	2016-03-01	null		View	Send

Listed 1 - 10 Records, Total 60 Records, Total 6 Page Jump To

Module Function: If you enable the invoice function, then the system will generate a system invoice for you. You can check your invoice online or email to a mailbox. All the system administrators' invoice will show on the front page. Please click [View] to check online or [Send] to send to default mailbox.



UCServer
Data & Voice Solutions

电子账单

2229

团队管理员账单总结

账单日 Statement Date	本期应还金额 Current Balance
2012-04-4~2012-05-4	0

姓名 Name	电话号码 Phone number	地址 Address	电子邮箱 E-mail
2229			

账单打印日期 Invoice Date: 2012-05-14 账单日 Statement Date: 2012-04-4~2012-05-4

到期还款日 Payment Due Date: 2012-05-10

用户名称 User Name	费用 Credit	成本 Cost
2229	0	0

本期应还金额 Current Balance : ￥0

本期应还金额 Current Balance	=	上期账单金额 Balance B/F	-	上期支付金额 Payment	+	本期账单金额 New Charges	+	本期调整金额 Adjustment	+	利息 Interest
￥0		￥0		￥0		￥0		￥0		￥0

月租费 Monthly fee :	￥0.00	外呼 DialOut :	￥0
呼入 DialIn :	￥0.00	其他 Other :	无

7.6 Account Invoice

On the leftmenu,click[Finance]-> [System Invoice] to open the page

Module Function: If you enable the invoice function, then the system will generate a system invoice for you. You can check your invoice online or email to a mailbox. All the system administrators' invoice will show on the front page. Please click [View] to check online or [Send] to send to default mailbox.

电子账单

345

用户账单总结

账单日 Statement Date	本期应还金额 Current Balance
2012-04-4~2012-05-4	0

姓名 Name	电话号码 Phone number	地址 Address	电子邮箱 E-mail
345			

账单打印日期 Invoice Date:	2012-05-14	账单日 Statement Date:	2012-04-4~2012-05-4
到期还款日 Payment Due Date:	2012-05-10		

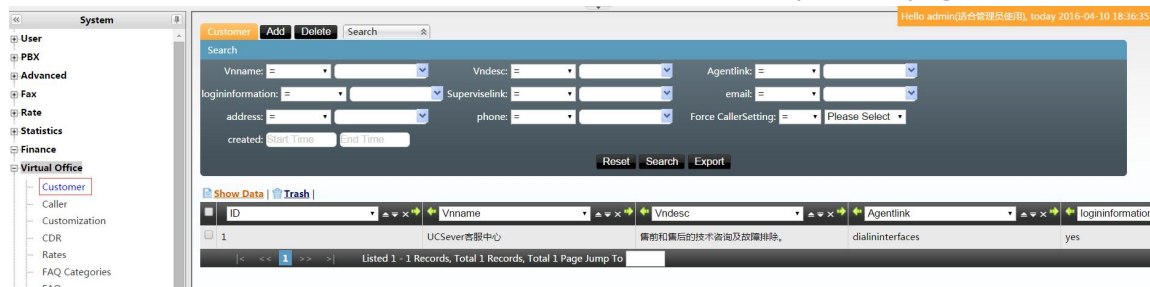
本期应还金额 Current Balance :	¥0				
本期应还金额 Current Balance	=	上期账单金额 Balance B/F	-	上期支付金额 Payment	本期账单金额 New Charges
¥0		¥0		¥0	¥0
				本期调整金额 Adjustment	利息 Interest
				¥0	¥0

月租费 Monthly fee :	¥0.00	外呼 DialOut :	¥0
呼入 DialIn :	¥0.00	其他 Other :	无

8 Virtual Office

8.1 Customer

On the leftmenu,click[**Virtual Office**]-> [**Customer**] to open the page



Module Function: Make a storage of virtual office customers and business' settings.

Add team rate

Click[**Add**]to enter the add rate page.

Required Field

- **Vname:** Name this virtual customer;
- **Team:** To which team this virtual customer belongs to;
- **Agentlink:** The agent 's link(customer company's call popup window)
- **Supervise Link:** The supervisor's link;
- **Surveys:** Can select one survey or multi surveys;

- **Login Information:** When open the customer page, whether to send out the login information or not;

Optional Field

- **AgentGroup Name:** To which agent group these virtual customers belong to;
- **Email:** The virtual customer's email address;
- **Address:** The virtual customer's contact address;
- **Phone:** The virtual customer's phone numbers;
- **Website:** The virtual customer's website;
- **Always new caller:** Always save new caller's information;
- **Upload Pic:** To upload virtual customer's picture, to show on virtual customer's desk
- **Call Hint:** Whether to enable call hint on the bottom right or not;
- **Vndesc:** To give a description on this virtual customer's business;
- **Welcome:** The welcome announcement the agents need to say after receiving the call hint;

Advanced

The screenshot shows a web application window titled 'Virtualcustomer Management'. Inside, there's a section 'Add Virtualcustomer' with two tabs: 'Basic' and 'Advanced'. The 'Advanced' tab is selected. The form contains several fields: 'CIDName' (text input), 'Cvnumber-callerid' (text input), 'Force CallerSetting' (dropdown menu set to 'no'), 'transfer' (dropdown menu set to 'att'), 'Transferpriv' (dropdown menu set to 'free'), 'ConsultAgent IsEdit' (dropdown menu set to 'no'), and 'Serverip' (text input). At the bottom right of the form are 'Save' and 'Back' buttons.

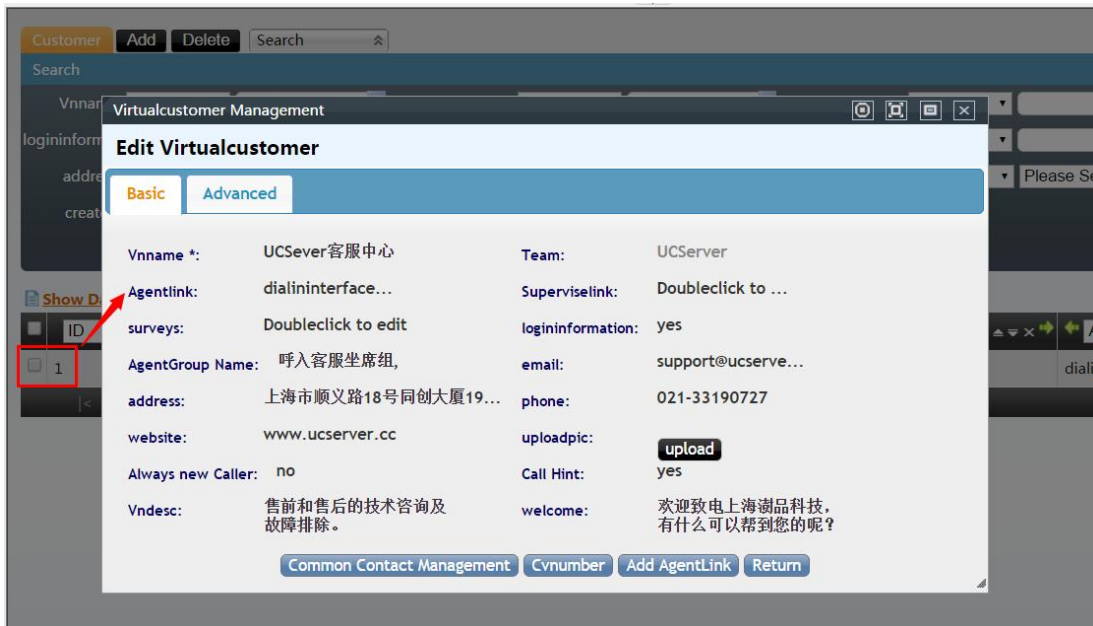
- **CIDName:** The CID name (Only for IP phones)
- **Cvnumber-callerid:** The CID numbers (Only for IP phones)
- **Force Caller Setting:**
- **Transfer:** To set the transfer type of the virtual customer, including attended transfer, blind transfer or both. This setting will be showed under the virtual customer page.
- **Transferpriv:** Restrict the transfer numbers. Free means can transfer to any numbers, contact means only can transfer to numbers in the contact.
- **ConsultAgent Is Edit:**
- **Server IP:** The trusted server IP. If this customer needs outside server to enable call center event, then you needs to write down the outside server IP here, if not, then leave it blank.

Click[**Save**]when finishing the page, then it will show the newly added data on the page.

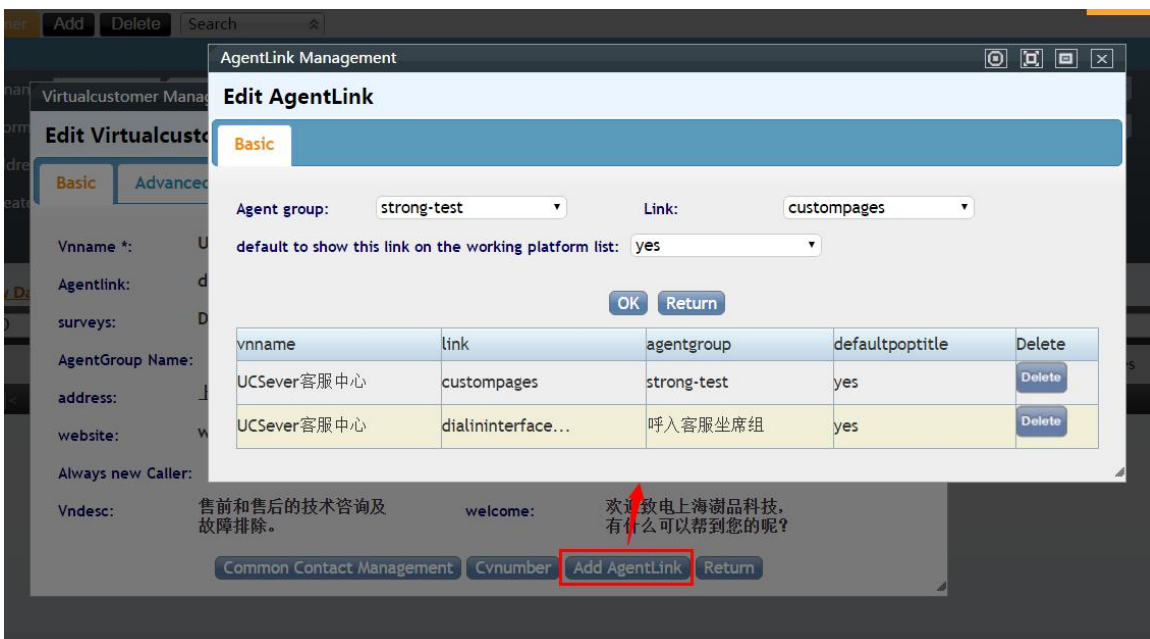
Show Data Trash			
ID	Vnname	Vndesc	Agentlink
1	UCSever客服中心	售前和售后的技术咨询及故障排除。	dialininterfaces

Edit

You can double click the field to re-open the edit page and edit them.



The gray field is can not be edited, only the black field is editable;
Click **【Add AgentLink】** to open the edit agent link page.

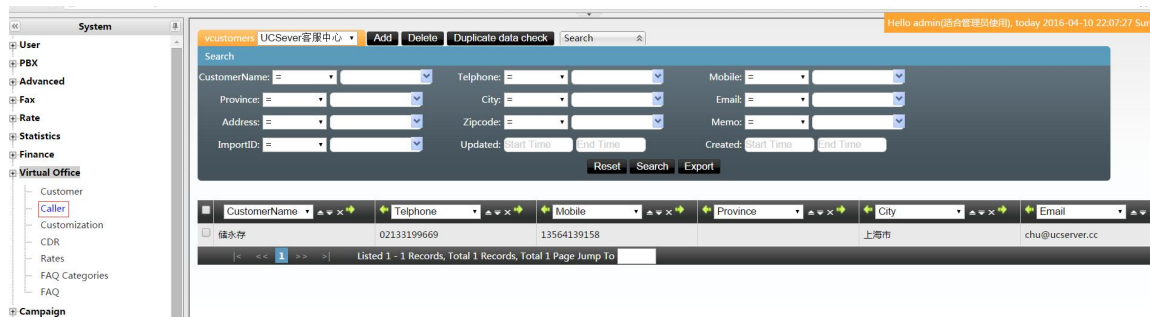


Module Function: To set different agent working platform for agent groups.

- **Default to show this link on the working platform list::** If set yes, this link will show up in the setting page of agent platform. The agent can check this link anytime, don't need to wait until get call hint.
- **Link:** The links listed are all those we setted under Link management page;
Click [Save] after finishing, a new added link will show on the bellow list.

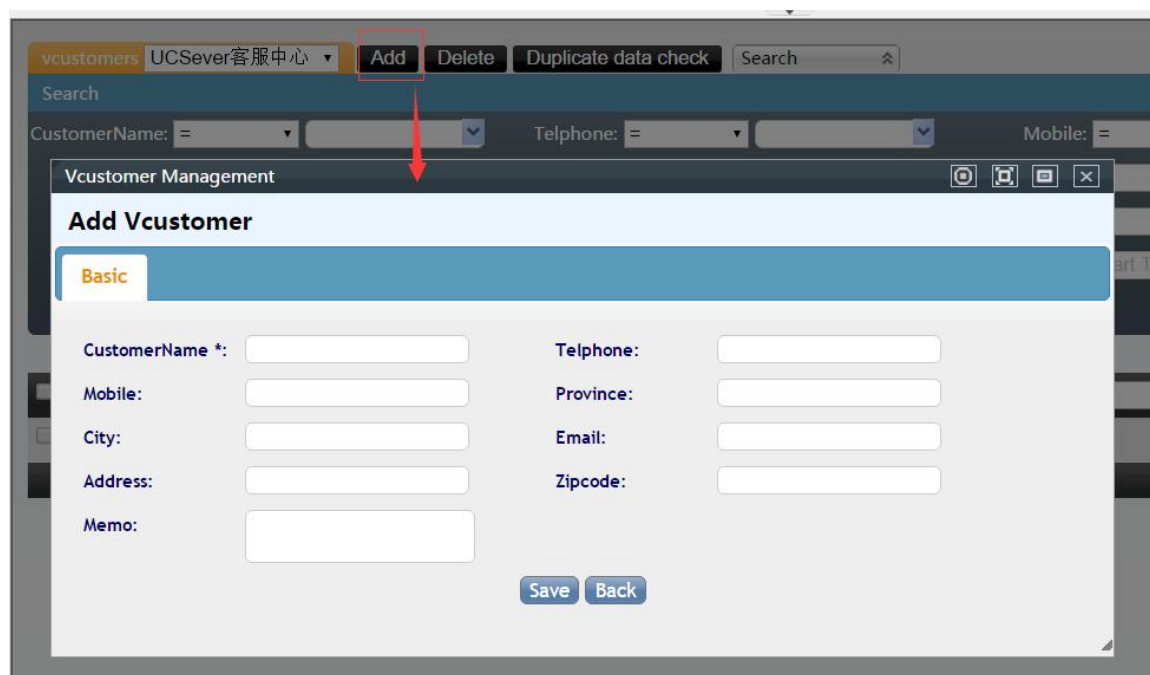
8.2 Caller

On the left menu, click **[Virtual Office]** -> **[Caller]** to open the page



Add Vcustomer

Click **[Add]** to enter the add Vcustomer page.



Fill the basic customer info. Click **[Save]** after finishing, the page will show the newly added the data..

Edit

You can double click to open the edit page again to edit the data

Vcustomer Management

Edit Vcustomer

Basic

CustomerName *: Mr Shi Telephone: 01050008000

Mobile: 13900000000 Province: Liaoning

City: Dalian Email: support@astercc.org

Address: Dalian Zipcode: 116203

Hello: asdasd Memo: Doubleclick to edit

Test4: Doubleclick to edit

Return

Double click the field, it will turn to input field

Memo:

After input the value, click your mouse out of the input box, the data will be saved.

Memo: New Customer
Editor Successful



The fields in red box are customized fields.
You can go to Customization setting to add them.

8.3 Customization

System

- User
- PBX
- Advanced
- Fax
- Rate
- Statistics
- Finance
- Virtual Office
 - Customer
 - Caller
 - Customization
 - CDR
 - Rates
 - FAQ Categories
 - FAQ

Customization Add Delete Search

Search

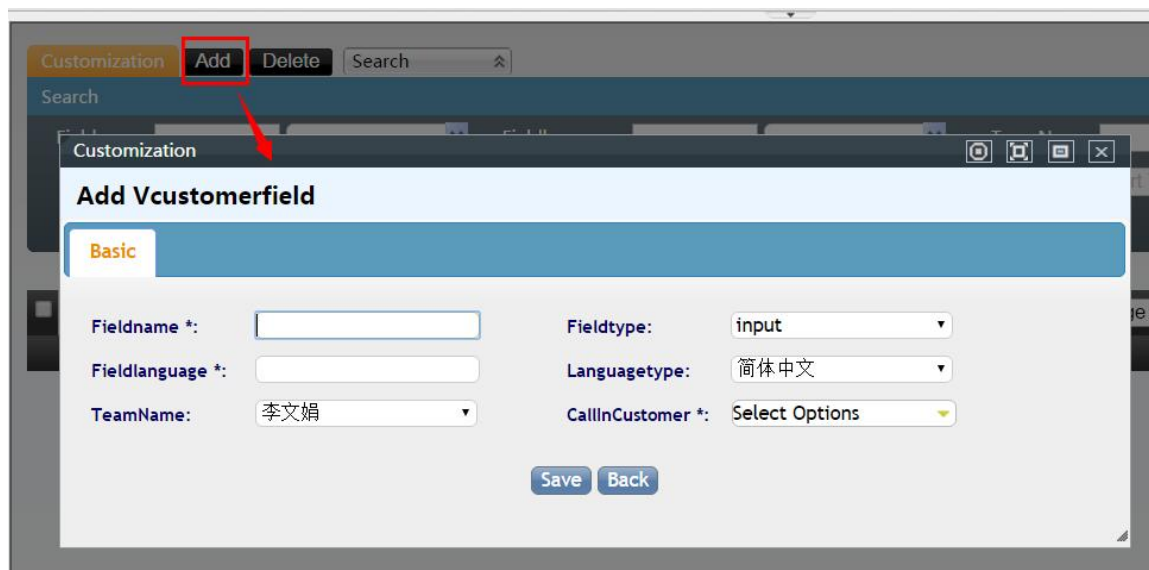
Fieldname: Fieldlanguage: TeamName: Fieldtype: Please Select Creby: Please Select Created Time: Start Time End Time

Reset Search Export

Fieldname	Fieldtype	Language	Fieldlanguage	SelectO
Listed 0 - 0 Records, Total 0 Records, Total 0 Page Jump To				

Module Function: To customize field for call in customer for special requirement;

Add



Fieldname: Name the field;

Fieldtype: Customized fields including input,select,text,upload,date,datetime and link

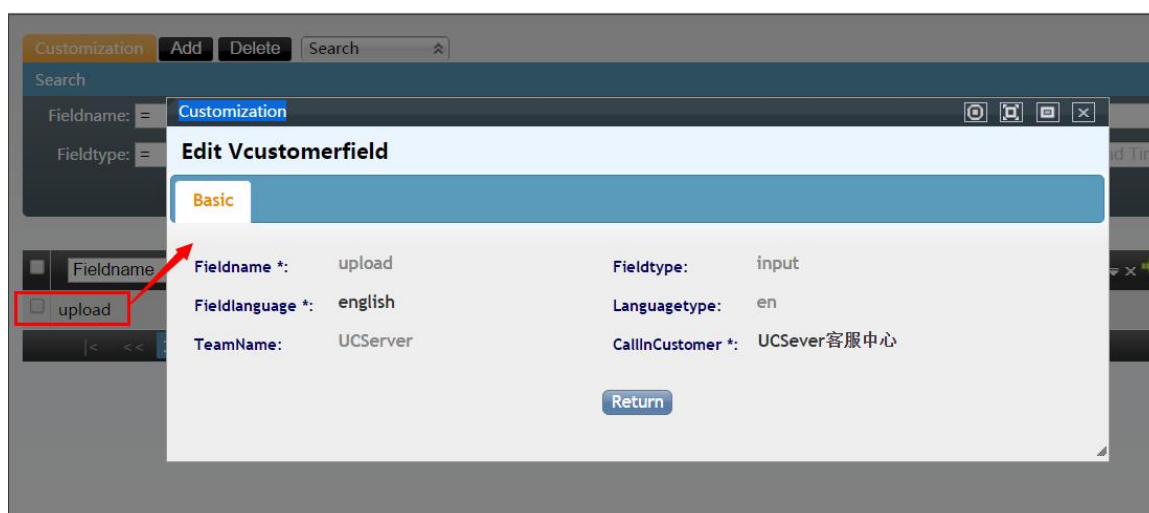
Fieldlanguage: The customized field's language,the language should in the default language ;

Languagetype: In which language catalog this customized field belongs to;

TeamName: Choose the callin customer's team name;

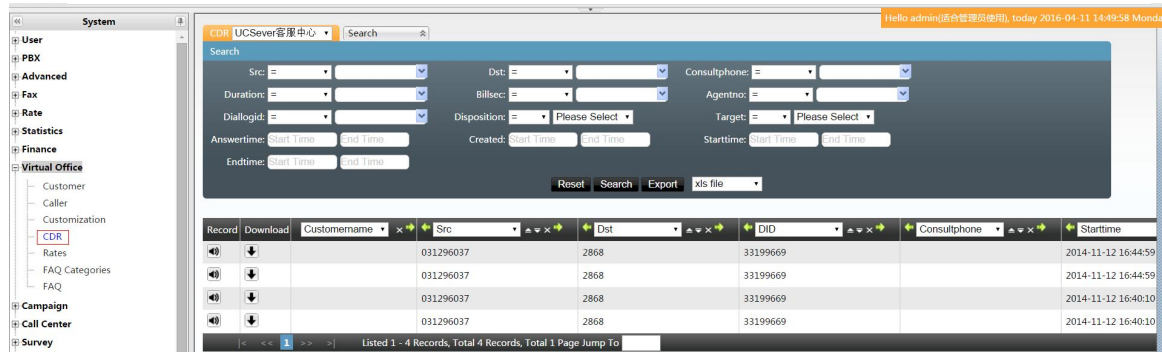
Callin Customer: To choose the target callin customers;

Edit



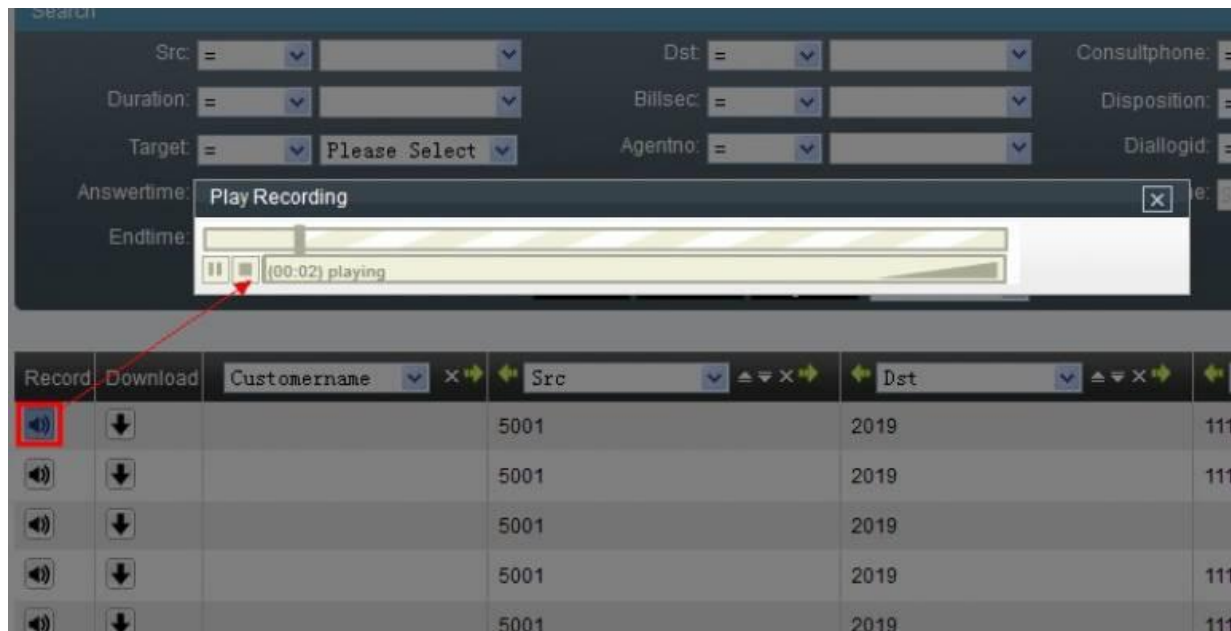
The gray field is can not be edited, only the black field is editable;

8.4 CDR

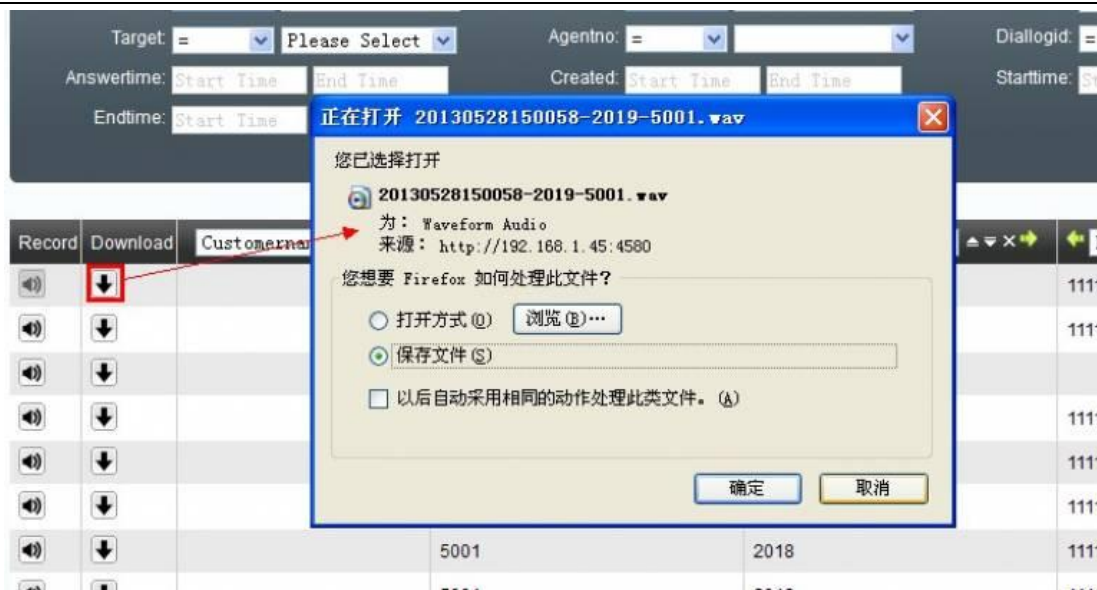


Module Function: To check the system's CDR info.

Can click  to listen the customer cdr, like this:

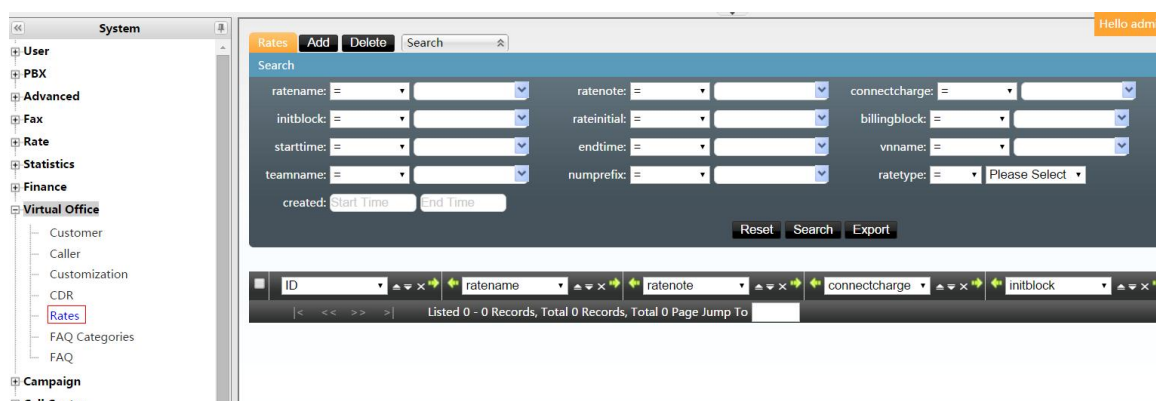


Can click  to download the cdr monitor like this:



8.5 Rates

Rate page is used to create rate for different customer, use the rate to bill for the customer by incoming and transfer.



Add

Click the add button, can see the follow page:

The screenshot shows the 'Add Virtual Rate' dialog box in the EQUINET VINA-PBX interface. The dialog is titled 'Add Virtual Rate' and has a 'Basic' tab. It contains various input fields for configuring a new rate, including teamname, vnname, ratename, connectcharge, initblock, rateinitial, billingblock, starttime, endtime, ratetype, numprefix, and ratenote. A red box highlights the 'Add' button in the top navigation bar, with an arrow pointing to the 'Add Virtual Rate' dialog.

Req

Required

ratename: Rate name, is used to distinguish the different rate

rateinitial: The rate per minute

billingblock: How long to charge by the rate

Optional

teamname: the team which the current rate belongs to

vnname: according to the team, can select the caller to create the rate for it

connectcharge: the rate when connect

initblock: the seconds of the connect charge

starttime: the effective start time of the current rate

endtime: the effective end time of the current rate

ratetype: rate type, include dialin and transfer

numprefix: use with the rate type. when the rate type is transfer, can fill the numprefix

ratenote: save the rate message

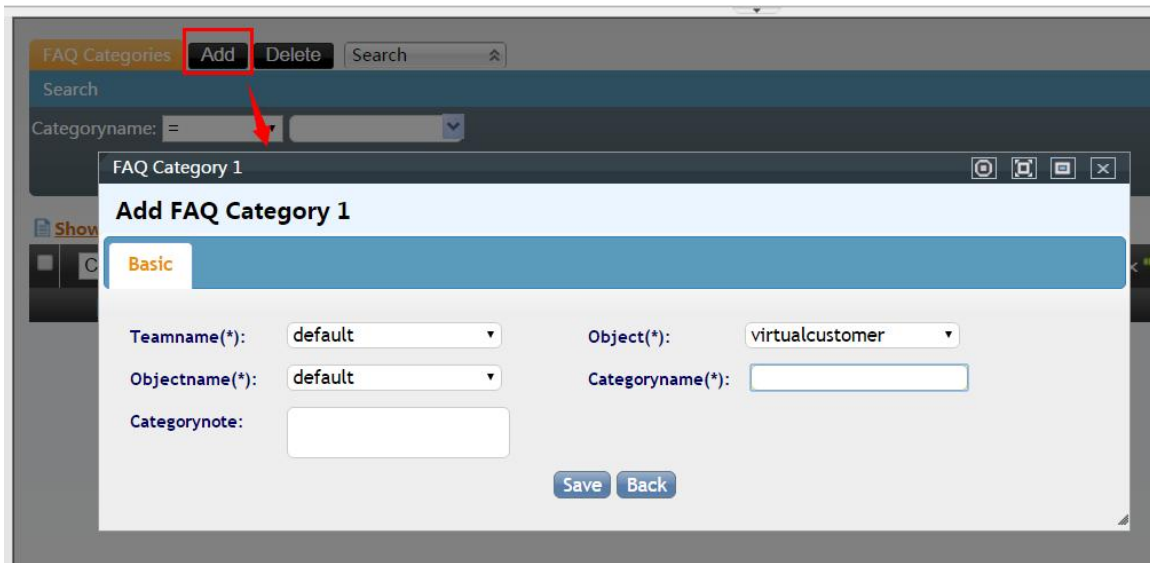
Edit

After saving successfully, can double click the data to open the edit page, can update the parameter, like this:

8.6 FAQ Categories

Add FAQ Category 1

Click [Add] button to open the add page

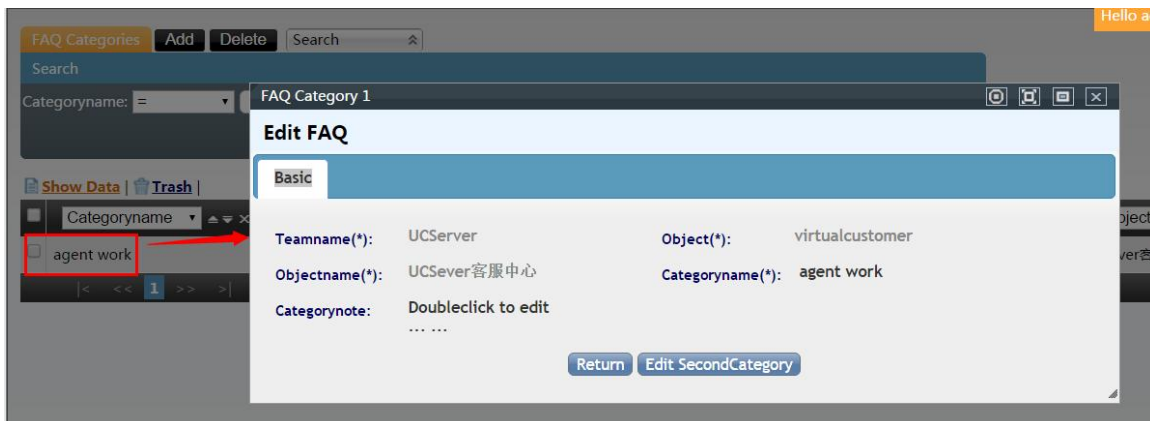


Fill relate message,then click [save] button to save the data.The saved data will be shown in the list.



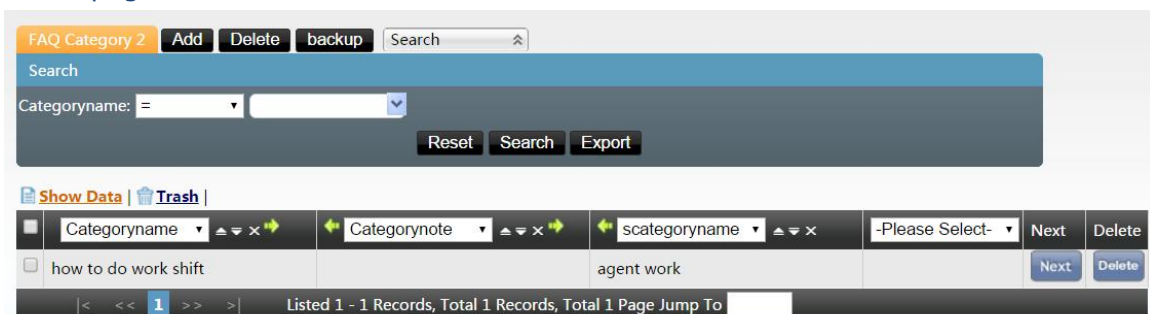
Categoryname	Categorynote	Teamname	Knowledge type	Objectname	-Please Select-	Next	Delete
agent work		UCServer		virtualcustomer	UCSever客服中心	Next	Delete

Double click the data,can edit it.



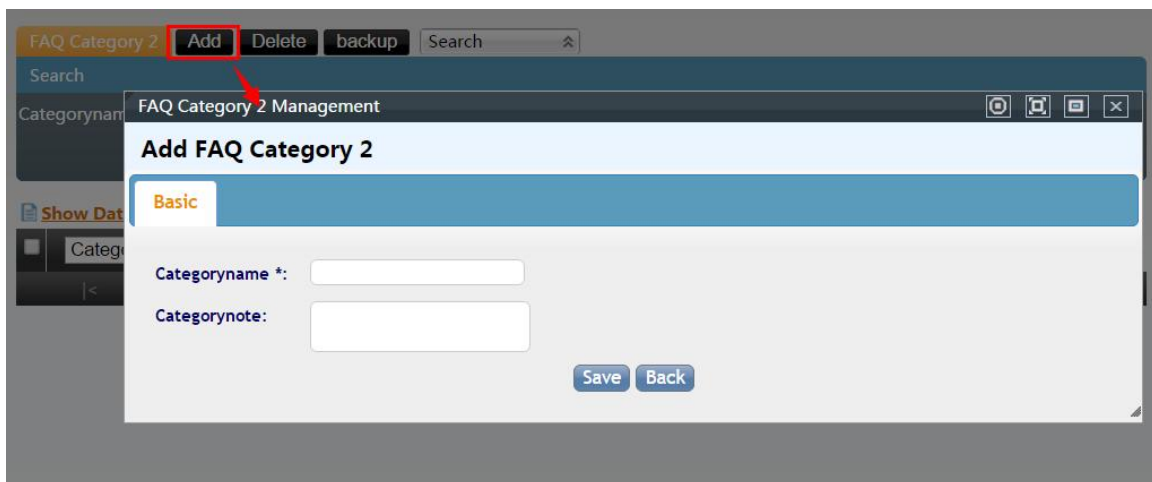
The cursor mouse out,will update the value automatically.

Click [EditSecondBtn] button or click [next] button in the page list to open `FAQ Category 2`'s page.

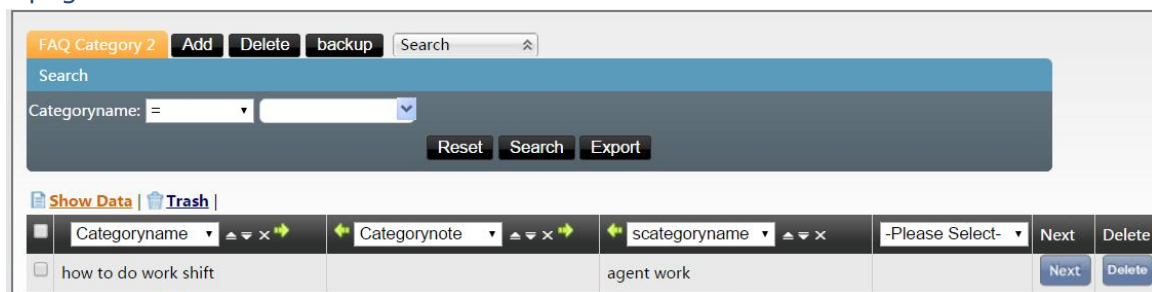


Categoryname	Categorynote	scategoryname	-Please Select-	Next	Delete
how to do work shift		agent work		Next	Delete

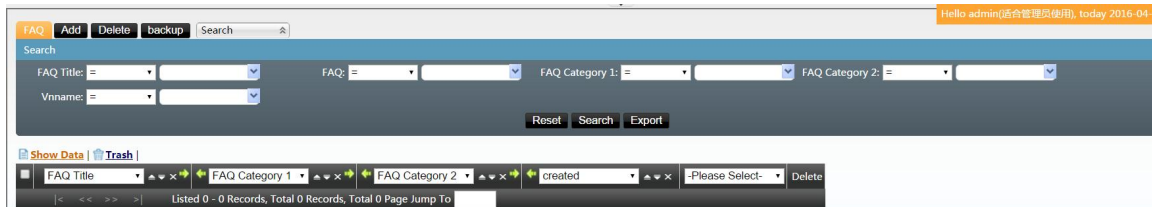
On the `FAQ Category 2`'s page,click [add] to add `FAQ Category 2`'s data.



After fill the information, then click the [save] button to save it. The data will be shown in the page list.



Click [next] button to open the FAQ page.



Click [Add] page to create FAQ for the `FAQ Category 2`

Click [save] to save the data, then it will be shown in the page list.

Show Data Trash					
FAQ Title	FAQ Category 1	FAQ Category 2	created	-Please Select-	Delete
The shift	agent work	how to do work shift	2016-04-12 08:47:38		Delete

Double click the data, can edit it.

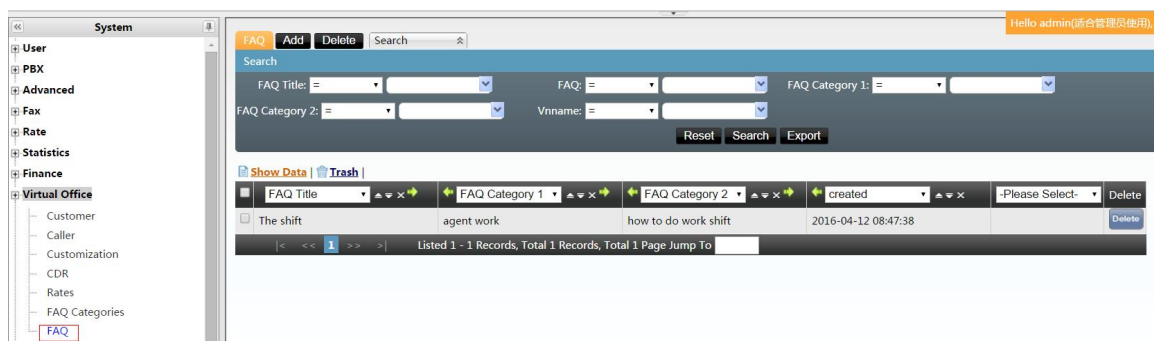
`FAQ Category 1` and `FAQ Category 2` just like the tag, it will help you easily to find it. Just like sports is the `FAQ Category 1` and football is `FAQ Category 2` of `FAQ Category 1`. They have relationship.

So, the FAQ can be "How many person of one team will apperence in the stadium at the same time? Answer: 11 person"

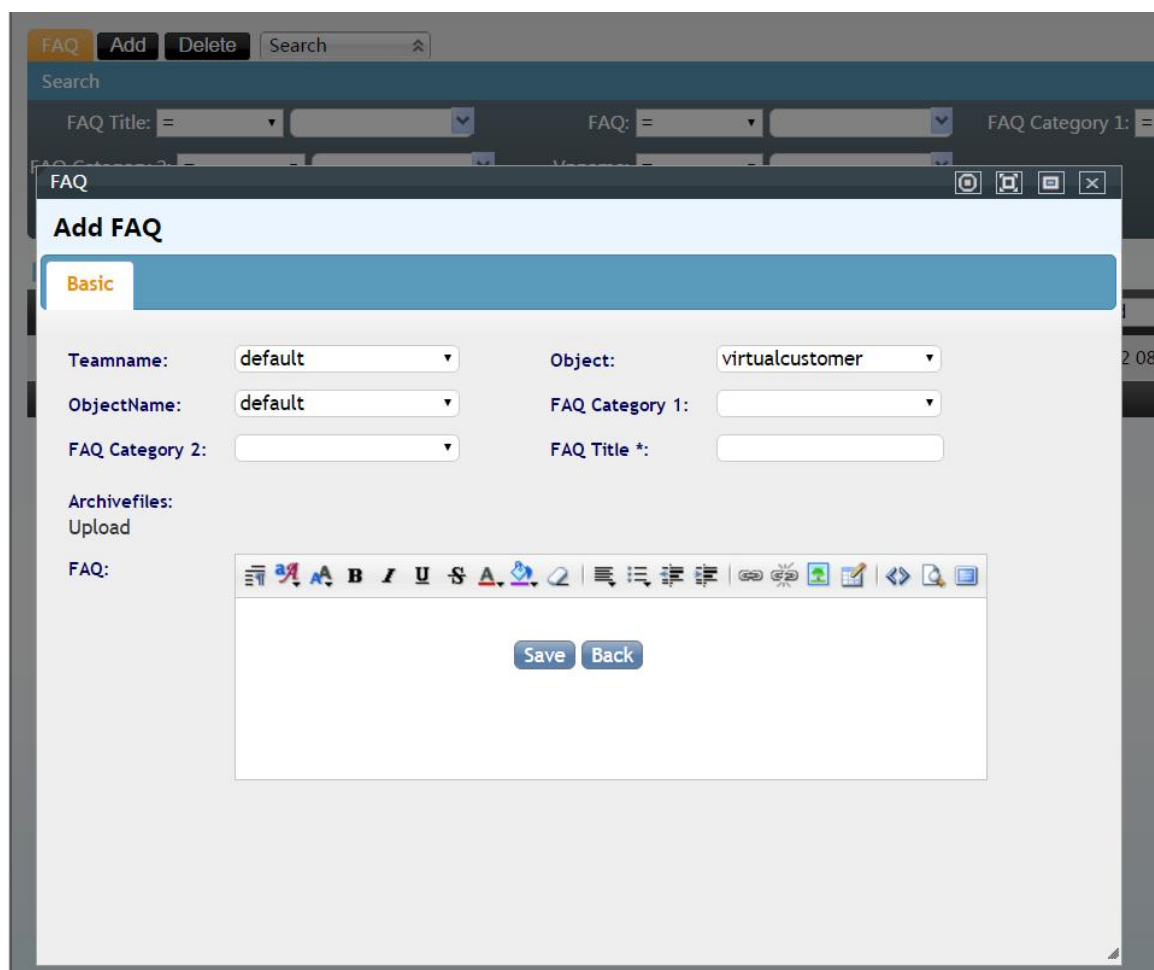
8.7 FAQ

Create FAQ Category to manage the FAQ for the customer, to help the agent to resolve the problem for caller.

On the left menu, Virtual Office → FAQ Category 1, open the FAQ page



Click Add button to open the add page



Teamname: which team need to use the FAQ. If choose `default`, all the customer can use the FAQ.

Objectname: which customer need to use the FAQ. If choose `default`, all the customer of the team can use the FAQ.

FAQ Category 1: The FAQ Category 1, choose one category, then the `FAQ Category 2` related will be shown in the `FAQ Category 2` premeter's select

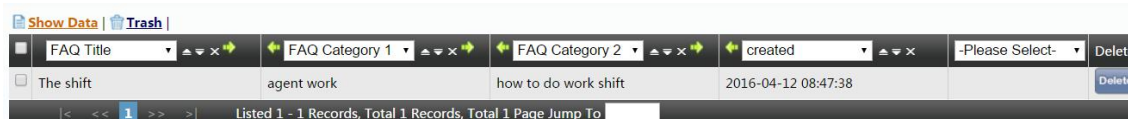
FAQ Category 2: The FAQ Category 2, the select option value is related with the `FAQ Category 1`

FAQ Title: Simply describe the FAQ function

Archivefiles: support upload the file for FAQ. So the agent servers for the customer can download the file to read.

FAQ: FAQ content

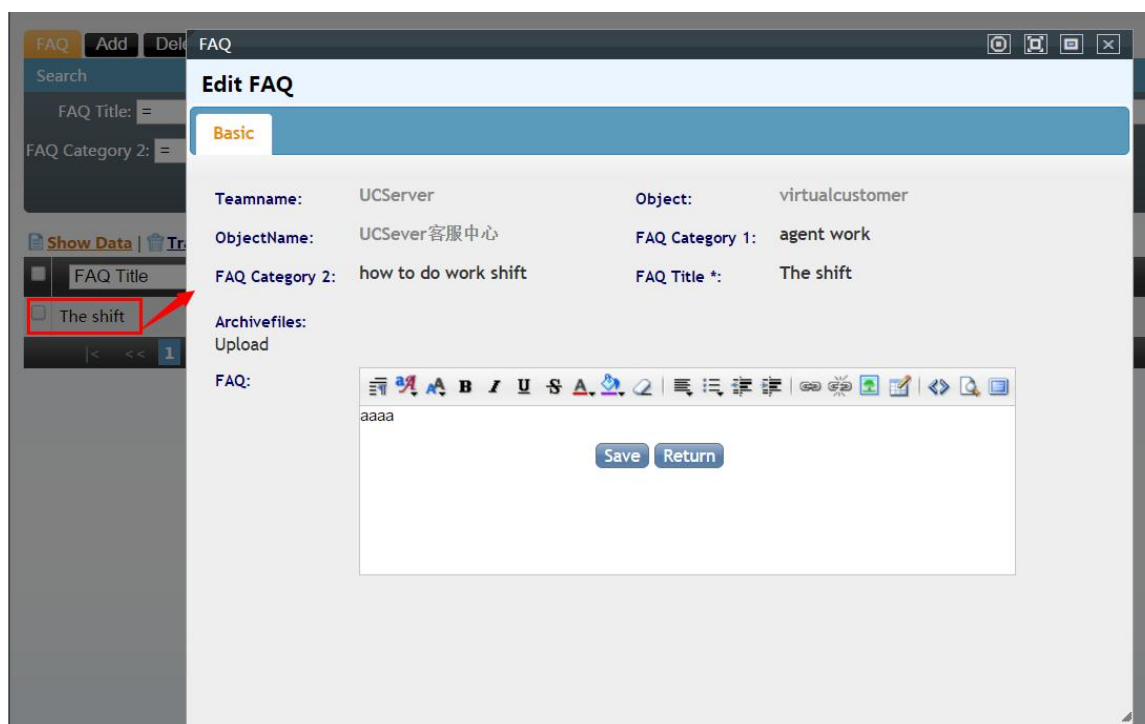
Click [Save] button to save the FAQ, then it will be shown in the page list:



FAQ Title	FAQ Category 1	FAQ Category 2	created	-Please Select-	Delete
The shift	agent work	how to do work shift	2016-04-12 08:47:38		Delete

Listed 1 - 1 Records, Total 1 Records, Total 1 Page Jump To

Double click the data, can edit the data:



Edit FAQ

Basic

Teamname: UCServer Object: virtualcustomer

ObjectName: UCSever客服中心 FAQ Category 1: agent work

FAQ Category 2: how to do work shift FAQ Title *: The shift

Archivefiles:
Upload

FAQ:

aaaa

Save Return

Double click the `FAQ Category 1` premeter, can edit it. Change the `FAQ Category 1` select, it will relate the `FAQ Category 2` category to show in the `FAQ Category 2` premeter's select. So if confirm it, you can click [Confirm] button to update the FAQ.

9 Campaign

9.1 Campaigns

On the left menu, please go to [Campaign] -> [Customer] to open the page

Import	Clone	ID	Campaign	Use Main Table	Memo
<input type="checkbox"/>	<input type="button" value="Clone"/>	99	123	No	
<input type="checkbox"/>	<input type="button" value="Clone"/>	98	测试外呼	No	
<input type="checkbox"/>	<input type="button" value="Clone"/>	97	Eason测试	No	
<input type="checkbox"/>	<input type="button" value="Clone"/>	96	总表任务	Yes	
<input type="checkbox"/>	<input type="button" value="Clone"/>	95	外呼任务1	No	
<input type="checkbox"/>	<input type="button" value="Clone"/>	91	Gms	No	
<input type="checkbox"/>	<input type="button" value="Clone"/>	49	VT	No	
<input checked="" type="checkbox"/>	<input type="button" value="Clone"/>	48	VINCENT TEST	No	
<input type="checkbox"/>	<input type="button" value="Clone"/>	40	aaaa	No	
<input type="checkbox"/>	<input type="button" value="Clone"/>	37	机构客户测试	Yes	

The module function: set a campaign and agents can work in this page.

Assign this campaign to some agents, which customers the agents will be calling, which fields of the customer information can be seen or edited by the agents, or by the background administrator; whether the agent can check the working pace of the group fellows, and the proportion of the work to be checked by the quality control.

Add

Campaign Management

Add Campaign

Basic | Advanced | Predictive Dialer | Survey | E-commerce

Campaign *:

Priority:

Customer Package:

Agent Get Customer:

Agent Max. Own:

Agent Group*:

Allow Add New:

Hangup When Submit:

Load Contact History:

Phone Attribute:

Status:

Customer Package:

Worktime:

Each Fetch:

Team:

Campaign URL *:

exit ACW when submit:

Remove Callback After Submit:

Default Status:

Listed 1 - 10 Records, Total 19 Records, Total 2 Page Jump To

In this page, you can see three tags, Basic, Advanced, Predictive Dialer, Survey and E-commerce.

Basic

- **Campaign:** name this campaign.
- **Status:**
- **Enable:** This campaign is enabled to all users
- **Agent Campaign List Disabled:** Agent could not see this campaign in his campaign page
- **Disabled:** User could not see this campaign
- **Priority:** The display order in the agent campaign page, priority level: Urgent > common.
- **Customer package(增加 Type):** The type of the customer package assigned to the campaign: Individual or Organization.
- **Customer package:** You can create a new independent customer package or use a main table package (Individual Customer Table or Organization Customer Table).
- Create new customer package : The newly created campaign involves creating a new customer package, and they share the same name, this customer package has nothing to do with any other packages
- Individual Customer Table/Organization Customer Table: AKA "main table", a team package for individual/organization customers, in the package a customer will link to a customer in main table, you can move a customer into(out of from) a package from main table, only main table campaign can use work order



If you use main table, you can't use predictive dialer.

- **Work time:** To control the working time of the campaign. Any time means it works anytime. When you choose like 8am to 5 pm, then the campaign working during these hours.
- **Agent Get Customer:** Whether the agents can manually obtain the data in the campaign page.
- No by default. Agents cannot obtain customers, only the administrator can assign them customers.
- If choosing yes, then in the campaign page, you can see the button to obtain customers
- **Each Fetch:** The customer number agent could get each time by clicking the button.
- **Agent Max.Own:** The max. number an agent could have under his "New" tab
- **Team:** The campaign team
- **Agent Group:** the agent group which will work for this campaign

- **Campaign URL:** The working page to be opened when the agents opens the campaign in the agent working page.
- **Allow add new (customer):** Whether allows the agents to add new customers to the customer package in this plan.
- If no, not allow.
- Yes by default, that is allow agents to add new customers. In the campaign page you can see the[**Add customer**]button.
- **exit ACW when submit:** Whether to exit ACW after the agent saves the call result.
- If Yes, exit ACW if agent is in, the agent becomes idle for next call.
- If No, agent has to click ACW to exit ACW mode.
- **Default status:** The default status when agent get a customer popup.

Advanced

The screenshot shows the 'Add Campaign' form in the 'Advanced' tab. The form is divided into two columns of settings. The left column includes fields for Dialway (Default), QC percentage, Auto Re-dial, CIDName, Force CallerSetting (No), Transfer Priv. (All Numbers), Blacklist Direct (Team), ConsultAgent IsEdit (No), AllowManualPopCustomer (No), New Tab Order (ID ASC), Call Hint (Yes), and a Memo field. The right column includes fields for Count Down (10), Delay(seconds), Verify when submit (ignoredial), CIDNum, Hiding contact info. (No), Agent cant edit after QC (Yes), RankingList View (No), Update Customer Status (Assigned Agent), Quick Schedule (3h, 1h, 2h, 30m, 1d, 1w), Check Reassign (No), Agent PlayRecord (No), Submit Post, and Serverip. At the bottom, there are 'Save' and 'Back' buttons.

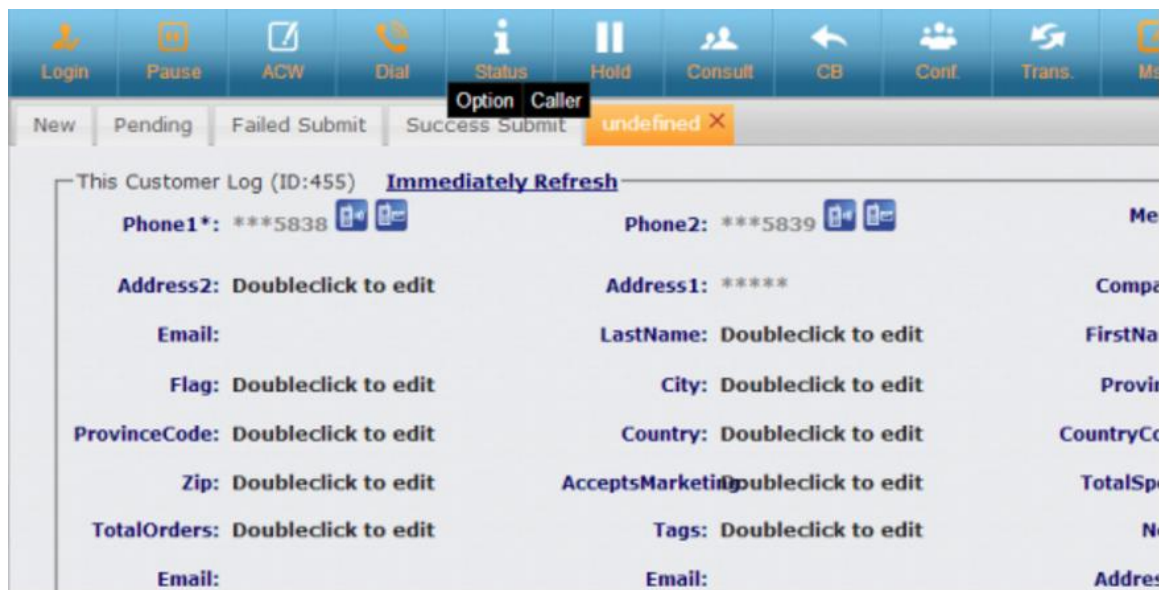
- **Dial Way:** Select how to dial in this campaign
- Default: Agent need to open the customer and click the dial icon to dial
- Preview: When agent open a customer, system will dial automatically
- Auto: Agent click "Start Work" button, system will dial customers one by one, when agent finish one customer, system will start count down, then open and dial another customer, for more information about auto dialing, please read [auto_dialing](#)
- Optional: Agent could choose his dial way.

- **Count Down:** The count down seconds when using auto dialing
- **QC percentage:** To tell QC agents how many recordings should get review
- **Delay(seconds):** In auto dialing, it will extend seconds in count down when agent click "Delay" button
- **Auto Re-dial:** The maximum dialing times in auto dialing and predictive dialer
- **Dial 2-legs:** To ensure agent could talk to customer, by default system will dial agent phone first, when agent answered, it dial customer number, by enabling dial 2-legs, you can speed up the dial process by dialing both parties at same time.
- **Verify when submit:** To define when agent could save call result and submit a survey
- **ignoredial:** Agent could save call result and survey any time
- **checkdial:** As long as agent talked to customer, he's able to save call result; Only when agent is talking to customer, he can process a survey, when the call is done, agent could not check more survey questions, to avoid agent submit fake survey.
- **checkstart:** As long as agent talked to customer, he's able to save call result; Only when agent is talking to customer, he can start a survey, but agent can process or save a survey no matter he is in a call.
- **CIDName,CIDNum:** CallerID used in this campaign
- **Force CallerSetting:** When select "Yes", campaign callerid will overwritten callerid setting in agent (when agent dial directly from his phone)



When force callersetting is no and agent dial from his phone, 1st callerid is to use agent caller id, if agent caller id is not defined, it will use device caller id, and then campaign caller id

- **Survey Fullscreen:** When customer information popup, if the survey(if has) will become full screen
- **Hiding contact info.:** When enabled, agent could not read customer phone number, fax number, email and address



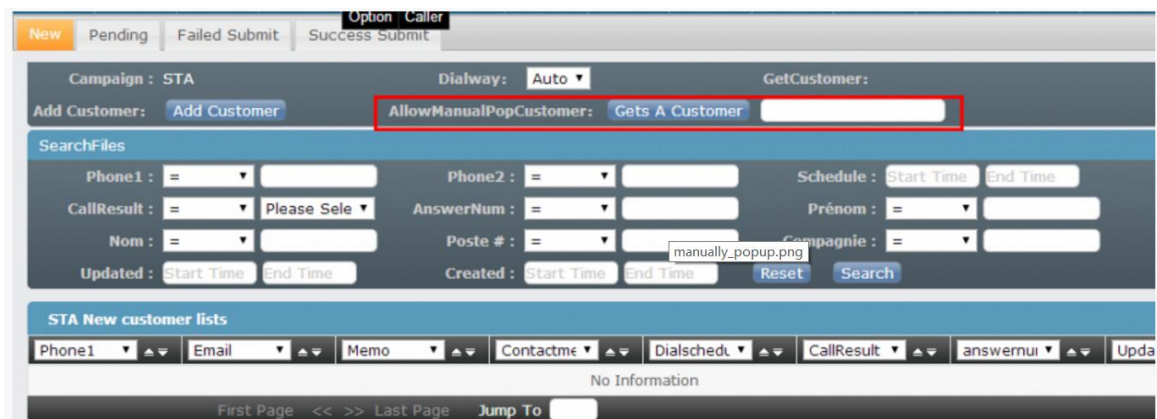
- **Transfer Priv.:** If agent is able to transfer the call to any number
- **Agent cant edit after QC:** If agent is able to edit a customer which has been reviewed in QC page
- **Load Contact History:** When customer popup, if it loads history records
 - Manually: Agent needs to click the link to load history records
 - Auto: System will load history records when popup
 - Forbidden: Agent could not see history records
- **Blacklist Direct:** When agent select call result "DNC", the number will be sent to black list
- **Team:** The whole team will not be able to dial this number any more
- **Current Campaign:** Agent is not able to dial this number only in current campaign
- **RankingList View:** Agent rank



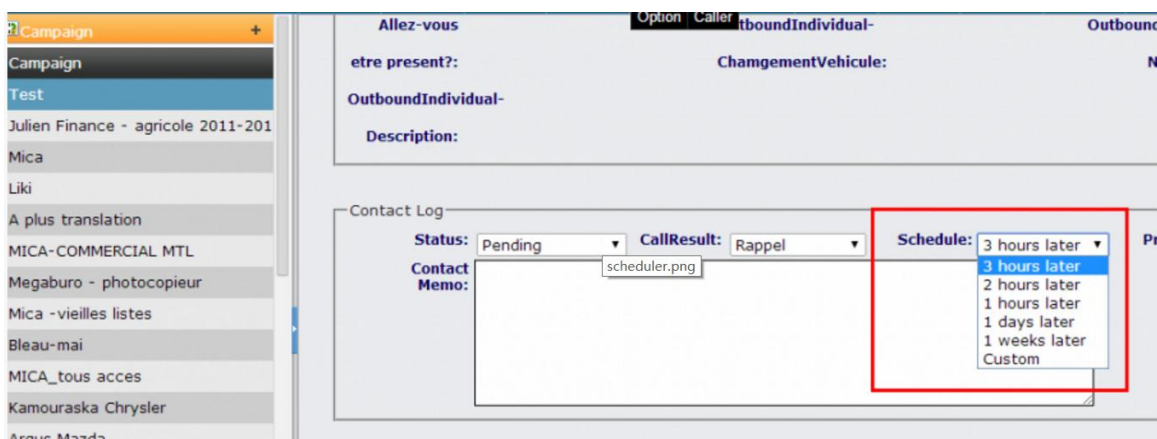
This feature is resource consuming, enable only when you don't have much agents and customers



- **ConsultAgent IsEdit:** When agent consult another agent, the other agent also get popup, this option is used to control if he can edit this customer.
- **Update Customer Status:** If any agent or only assigned agent could change customer status
- **AllowManualPopCustomer:** If Yes, agent will see a button to get a new popup customer or search by phone number



- **Quick Schedule :** h = hour, d = day, w = week, for 3h,1h,2h,1d,1w you will have



- **New Tab Order:** the default sort order in New tab

- **Check reassign:** If yes, and the customer calling in does not belong to this agent, the customer information will not pop up, only a reminder comes out. The agent transfers the call or doing consulting.
- **Call hint:** whether there is a reminder in the lower right corner when calls come in.
- **Agent Play Record:** Whether to allow agent to play record or not.
- **Reset when no contact in(Days):** How many days will the campaign reset when no contact in;
- **Submit Post:**
- **Memo:** Give a description to this campaign.
- **Server IP:** If you want to use API to this campaign from external system, you need put the source ip

Predictive Dialer

The screenshot shows the 'Campaign Management' window with the 'Add Campaign' form. The 'Predictive Dialer' tab is active. The form includes the following fields:

Field	Value
Dialer Status:	Enable
Dialer Account*:	8400
Hangup Ring When No Idle:	Disabled
Dial-in Exten.*:	Current AgentGroup
No Answer Redial Delay:	
Ringing Timeout:	30 s
Remote Fields:	Select Options
Dialer MaxChannel:	0
Dialer Cap:	10
Dialer Interval:	3 s
Dialerring:	15
Dialer answer:	60
Dialeranswerate:	50 %
Followup Rate:	15
Short Call:	15 s
Short Call(%):	50 %
Short Call ACW:	0 s
Callee Wait:	10 s

Buttons: Save, Back

Module Function: It is used to configure & check pre-dictive dialer(PD)

- **Dialer Status:** if you want to enable predictive dialer for this campaign



When the campaign is using main table, you can't use predictive dialer

- **Dialer Account:** Billing account when you use the dialer
- **Hangup Ring When No Idle:**
- **Dial-in Exten:** What dialer do when customer answer
- Current AgentGroup: transfer to the queue which is bind to the campaign
- IVR: transfer to pre-defined system IVR
- **No Answer Redial Delay:** Total redial delay time for no answered calls

- **Ringing Timeout:** Max. ringing time in PD
- **Remote Fields:**
- **Dialer MaxChannel:** Max. calls in this PD
- **Dialer Cap:** Max. number PD dialed each time
- **Dialer Interval:** Dialing interval in PD
- **Dialerring:** Ringing time PD assumed
- **Dialer answer:** Talking time PD assumed
- **Dialeranswerrate:** Answer rate PD assumed
- **Followup Rate:** ACW duration PD assumed
- **Short Call:** Short call duration PD assumed
- **Short Call(%):** Short call rate PD assumed
- **Short Call ACW:** ACW duration for short calls PD assumed
- **Callee Wait:** Max. callee waiting time in the queue PD assumed

Survey

The screenshot shows the 'Add Campaign' window in the Campaign Management system. The 'Survey' tab is active. The 'Script Mode' is set to 'text', 'Script Fullscreen' is set to 'Manual', and 'Bind Survey' is set to 'Select Options'. A large text input area with a rich text editor toolbar is provided for entering the survey script.

Script Mode: Text or survey;

Script Fullscreen: Fullscreen manually or answerauto; 手动或者客户接通后自动全屏。

Bind Survey: Select a survey;

Text: Input the text input box;

E-commerce

Select a E-commerce.

Edit Campaign

When a campaign is set up, click save, and it will be shown in the list.

Double click and open this page, that shows buttons Report Alias, Background Fields, Agent Fields, Auto Assign Customers, Manual Assign Customers, Add Hangup Action, Clone, Import, Return.

Report Alias, you can set an alias for the title of the statement to be export of this campaign. Background Fields and Agent Fields, are to control which fields are to be displayed on the background page or agent working page, and which are editable.

Auto Assign Customers and Manual Assign Customers, are different ways to assign customers for agents in the group.

Fields in grey are not editable.

Report Alias

Click **Report Alias** to open this page,

The screenshot shows the 'Edit Campaign' interface with the 'FieldSet' window open. The 'FieldSet' window contains a table with two columns: 'FieldDisplay' and 'Alias'. The table lists various fields with their corresponding aliases. A red box highlights the 'Report Alias' button in the left sidebar.

FieldDisplay	Alias
ID	
individualname	
gender	
age	
birthdate	
phone1	
phone2	
fax1	
email	
address1	
country	
memo	

You can give each field a name, and if leave it blank, the default names will be used. This applies to [campaign_customers] and[qcpages] under Campaign.

Customer Fields

- In a campaign, we have "Agent Fields" which is used to control agent privilege, and "Background Fields" which is used to control user privilege.
- Click "Agent Fields", you can configure which information is readable, editable or mandatory.

FieldSet

EditField

FieldDisplay	<input type="checkbox"/> Check All	<input type="checkbox"/> Check All	<input type="checkbox"/> Check All
address1	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
phone1	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
individualname	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
phone2	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Edit	<input type="checkbox"/> Required
shixuebao	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Edit	<input type="checkbox"/> Required
mslt	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
selectCompound	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
test_datetime	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
test_date	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
test_date1	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Edit	<input type="checkbox"/> Required

OK

- In the window, you can drag a field to control the display sequence.

Customer Assign

- System provides two assign method
- Auto Assign: Good if you don't care customer details
- Manually Assign: Good if you want to do precisely assign

Auto Assign

- Click "Auto Assign Customers", it will popup a assign window

Auto Assign Customers

Customers in package : 21 person Finished : 0 person Assigned : 20 person Unassigned : 1 person Invalid : 0 person

Progress : No assign plan. Execution time : 2013-05-27 13:26:50

Agent No.	<input type="radio"/> by all New	<input checked="" type="radio"/> by all noassign	<input type="radio"/> By InvalidNumber	<input type="radio"/> By quota	average distribution	<input type="button" value="By allAgent"/>	New	Finished
2001		0	%	0	person		0	0
00		0	%	0	person		0	0
2227		0	%	0	person		2	0
1986		0	%	0	person		0	0
2018		100	%	1	person		18	0
1000		0	%	0	person		0	0
2019		0	%	0	person		0	0

OK Return

- For auto assign, you need to set an execution time, in "Process" you can see the current assign job status

Auto Assign Customers

Customers in package : 21 person Finished : 0 person Assigned : 20 person Unassigned : 1 person Invalid : 0 person

Progress : Will 2013-05-27 13:26:50 start assign plan. Execution time : 2013-05-27 13:27:46

Agent No.	<input checked="" type="radio"/> by all New	<input type="radio"/> by all noassign	<input type="radio"/> By InvalidNumber	<input type="radio"/> By quota	average distribution	By allAgent	New	Finished
2001	0	%	0	person			0	0
00	0	%	0	person			0	0
2227	0	%	0	person			2	0
1986	0	%	0	person			0	0
2018	0	%	0	person			18	0
1000	0	%	0	person			0	0
2019	0	%	0	person			0	0

OK Return

- In auto assign, you can assign by percentage or by number

Manually Assign

- Click **Manually Assign Customers** button, it will popup a new window so you can assign customers to agents manually.



If you have a survey in this campaign, and in the survey you configured quote, it will show the quote status here.

Manual Assign Customers

Hello admin(适合管理员使用), today 2016-04-12 10:52:50 Tuesday

Customers in package : 3 person Submitted : 0 person New : 3 person

Search

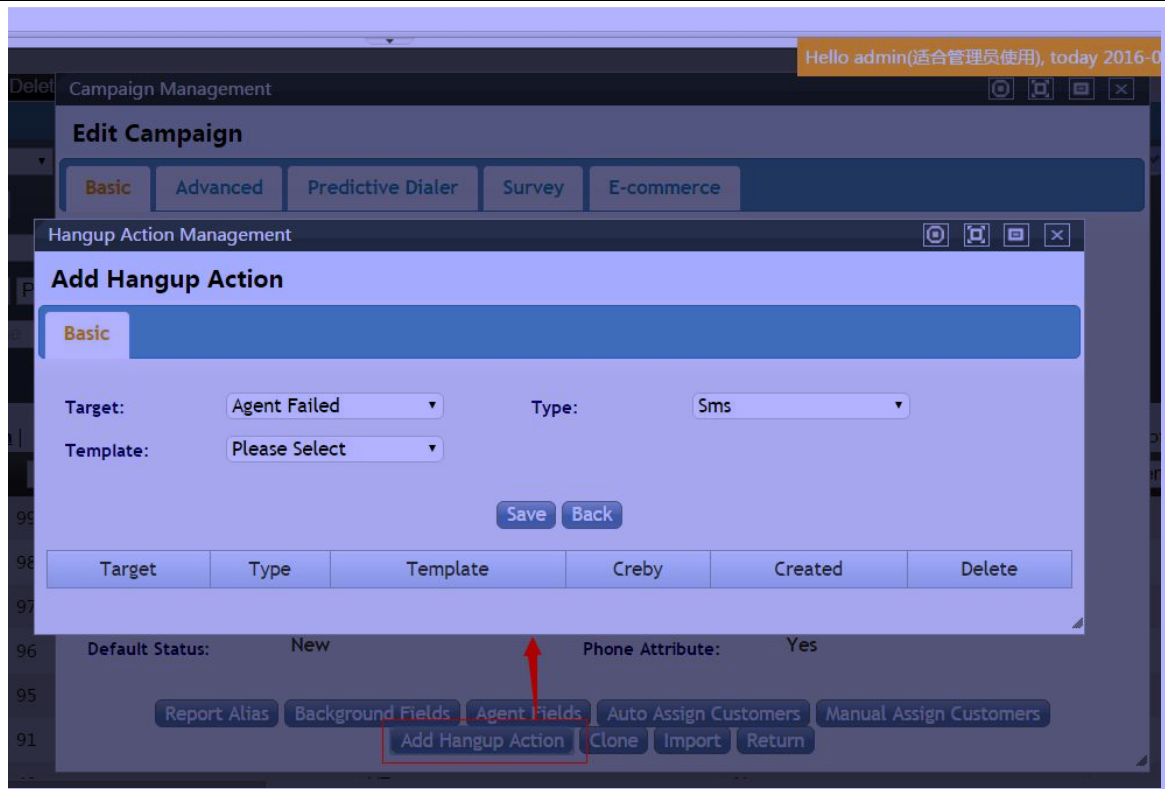
individualname: = age: = phone1: =
 phone2: = fax1: = email: =
 address1: = country: = memo: =
 flag: = OutboundIndividual-c: = creby: =
 contactmemo: = Auto Dialed: = Answernum: =
 noanswerum: = CallPath: = gender: = Please Select
 Status: = open By Agent: = Please Select dataresult: = Please Select
 birthdate: Start Time End Time created: Start Time End Time updated: Start Time End Time

Reset Search

NO.	Agent No.	individualn	gender	age	birthdate	phone1
1	0	张老师	unknown		2015-10-19	2869

- You can search and then assign customers to agents, select the agent number you want to assign the customers to, input the sequence number, click "OK" to assign.

Add Hungup Action:



Target: select a target;

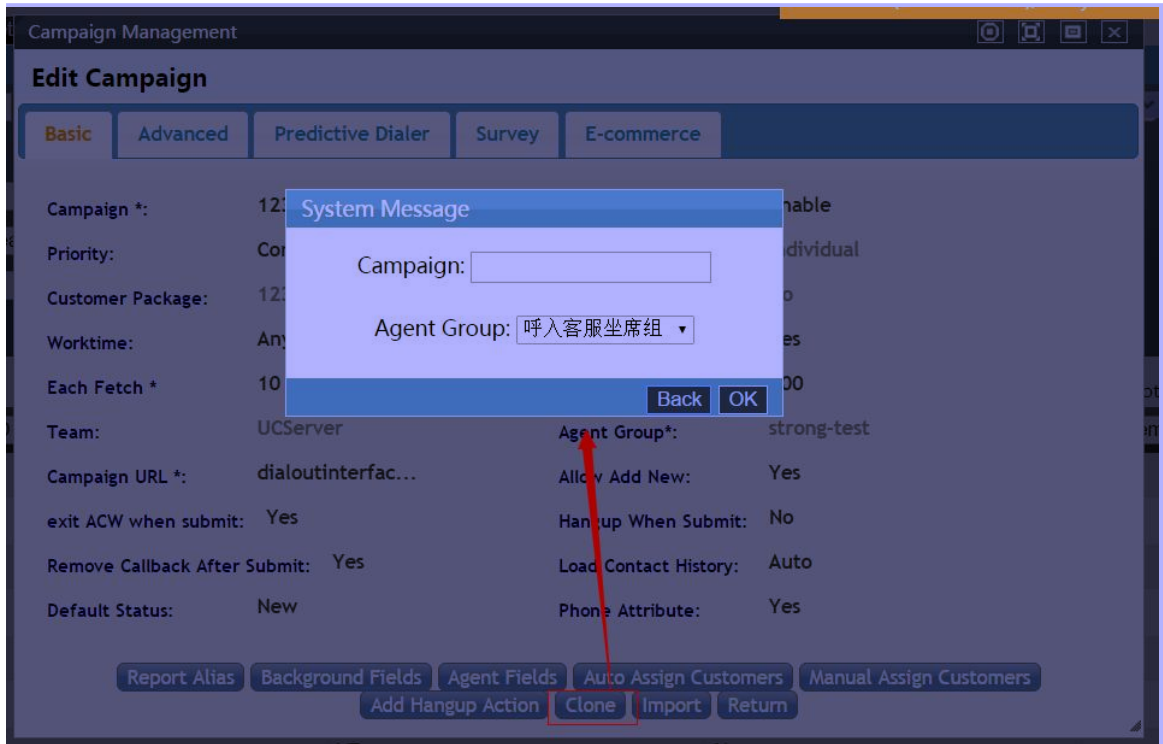
Type: short message or Email;

Template: Select a template;

After Save, a new data will list in the page.

Clone

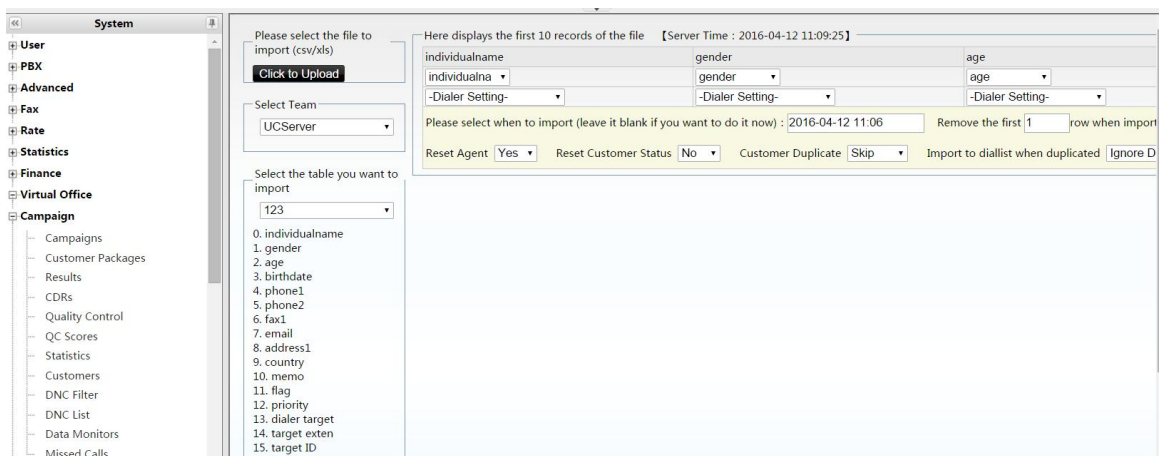
Click Clone, a system message will popup:



After the settings, it will clone a new campaign.

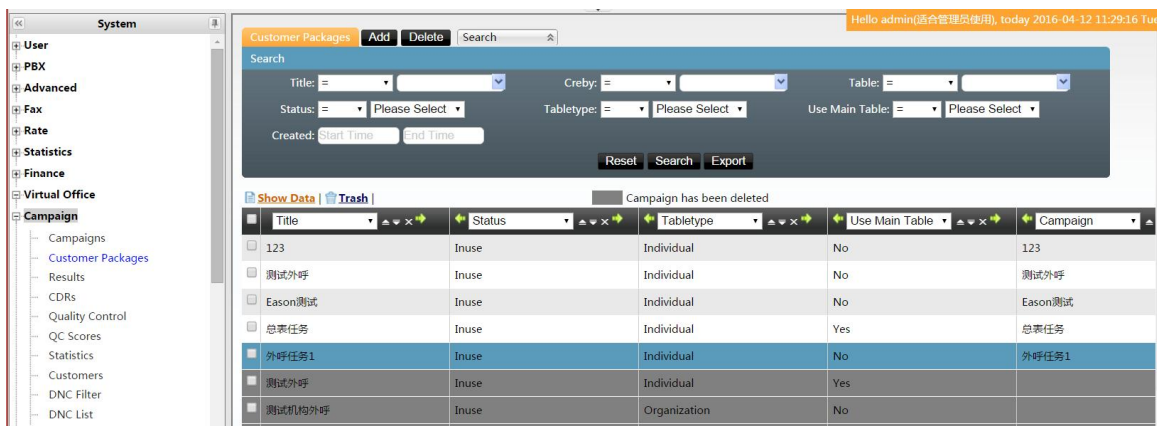
Import

Click Import ,it will turn to bellow page. Please click [Click to Upload](#) to upload new csv or Xls file.



9.2 Customer Packages

On the left menu, please go to **[Campaign]** -> **[Customer Packages]** to open the page

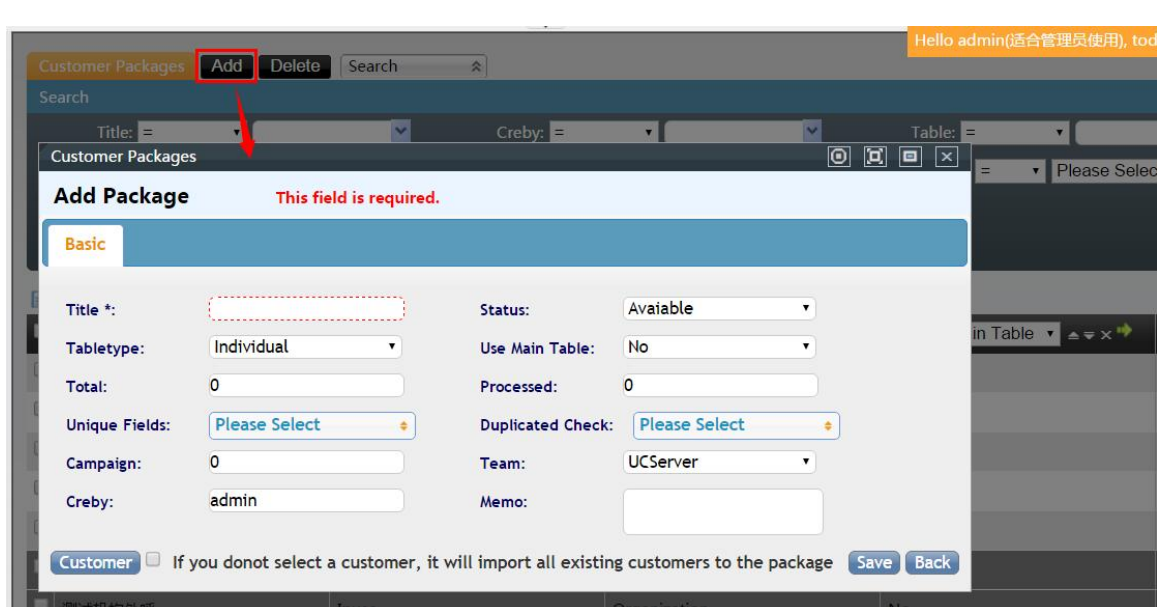


Module Function: Customer package is a customer contact info list of an enterprise or individual. This customer list is packed with its rules and requirement, then apply to a campaign. Each campaign will correspond to a customer package. When create a package, system will automatically establish a separate data sheet, name as individual customers table or corporate customers table. In this way, it is easy to manage customer contact info and can protect the main original table data from being destroyed.

You can import the data in bulk through "Import"

In this module, you can edit, delete and import (csv or xls) the customer info by searched result. This module can be added customer info repeatedly, deleted or exported customer data.

Add



Title: Name this package, mostly it is the same as the campaign.

Tabletype: Individual or organization, it links to different table type.

Unique Fields: Set a field or several fields as unique, to prevent duplication when import data manually. The default unique field is Phone.

Duplicated Check: The common search field is set to the duplicated check, to speed up the search operation. The default is Phone1 and Phone2.

Team: To which team this customer package belongs to. Only this team can select this customer package in campaign.

Click **【Customer】** button to import customer info to this package from main table. (If you don't select a customer, it will import all existing customers to the package).

ID	Name	Gender	Age	Birthday	Phone1	Phone2	Fax1	Email	Address1	Country	Last Contact ID
53	九喜祥云张帆	unknown		2016-03-29							0
52	极米陈总	unknown		2016-03-29							0
51	联合货币	unknown		2015-12-01							0
50	知诺	unknown		2015-12-01							0
49	展玉	unknown		2015-11-19							0
48	基顿	unknown		2015-11-18							0

Or you search out the customer info before importing. When finished, please click Confirm.

Edit:

Edit Package	
Title *	123
Tabletype:	Individual
Total:	3
Unique Fields:	phone1,
Table:	cc10_99_individualpackages
Team:	UCServer
Memo:	Doubleclick to edit
Status:	Inuse
Use Main Table:	No
Processed:	0
Duplicated Check:	phone1,phone2,
Campaign:	123
Creby:	admin

The gray field is can not be edited, only black field is editable.

The Unique Field and Duplicated Chek is also editable. But if there is duplicated data in your package, these two fields are not editable. Please go to Customer to delete the duplicated data.

Select from main database : To add customer info to this package:

ID	Name	Gender	Age	Birthday	Phone1	Phone2	Fax1	Email	Address1	Country	Last Contact ID
53	九露祥云张帆	unknown		2016-03-29	[REDACTED]	[REDACTED]					0
52	极米陈总	unknown		2016-03-29	[REDACTED]	[REDACTED]					0
51	联合货币	unknown		2015-12-01	[REDACTED]	[REDACTED]					0
50	知诺	unknown		2015-12-01	[REDACTED]	[REDACTED]					0
49	展玉	unknown		2015-11-19	[REDACTED]	[REDACTED]					0
48	基臻	unknown		2015-11-18	[REDACTED]	[REDACTED]					0

Export: To export customer info from customer package.

System Message

Please select execution time : 2016-04-12 14:26

☐ Send to email when export is done

Back OK

Edit Package

Basic

Title *: 123

Tabletype: Individual

Total: 3

Unique Fields: phone1, Duplicated Check: phone1,phone2,

Table: cc10_99_individualpackages Campaign: 23

Team: UCServer Creby: admin

Memo: Doubleclick to edit

Select from main database Export Customers Return

Click OK, then this package will be exported.

Click"Return", to back to operation platform.Click"Ok" to enter export job page:

Export Jobs [Refresh Now](#)

File Name	Page	Status	Data Number	Export SQL	Executed At	Creby	Cancel	Download	Delete
customerpackages_20160412-142917.xls	Customer Packages	Pending	0	View SQL	2016-04-12 14:26:00	admin			Delete
exportteam2_20160401-142112.tar.gz	Teams	Closed	0	View SQL	2016-04-01 14:21:12	admin		Download	Delete
exportteam72_20160401-142029.tar.gz	Teams	Closed	0	View SQL	2016-04-01 14:20:29	admin		Download	Delete
exportteam76_20160401-134735.tar.gz	Teams	Closed	0	View SQL	2016-04-01 13:47:35	admin		Download	Delete
exportteam75_20160330-171203.tar.gz	Teams	Closed	0	View SQL	2016-03-30 17:12:03	admin		Download	Delete
exportteam2_20160330-101909.tar.gz	Teams	Closed	0	View SQL	2016-03-30 10:19:09	admin		Download	Delete
agentrepresents_20160316-100317.xls	Agent Details	Closed	0	View SQL	2016-03-16 10:03:17	admin		Download	Delete
exportteam2_20160115-162621.tar.gz	Teams	Closed	0	View SQL	2016-01-15 16:26:21	admin		Download	Delete
exportteam2_20160115-162558.tar.gz	Teams	Closed	0	View SQL	2016-01-15 16:25:58	admin		Download	Delete
exportteam53_20151221-140603.tar.gz	Teams	Closed	0	View SQL	2015-12-21 14:06:03	admin		Download	Delete

RecordingFile Export [Refresh Now](#)

DirectoryName	Page	Status	Data Number	Export SQL	Executed At	Creby	Download	Delete
pbxcdr_20140926142517_admin	cc10_today_pbxcdrs	Closed	35	View SQL	2014-09-26 14:25:00	admin	Download	Delete

Double click it to edit.

Customer Packages

Edit Package

The campaign binded to this package is deleted, the package can not be used any more

Basic

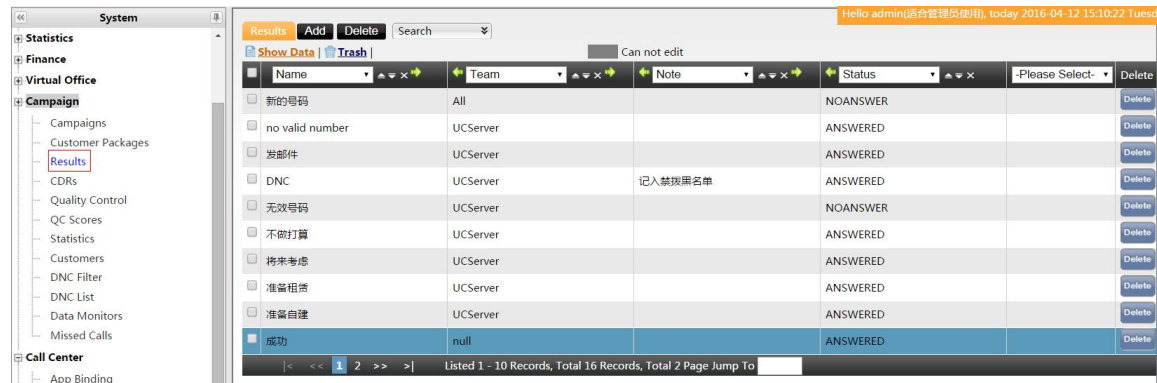
Title *:	CESHI	Status:	Inuse
Tabletype:	Individual(Use Individual Table)	Use Main Table:	Yes
Total:	0	Processed:	0
Unique Fields:	outbound_individual_id,	Duplicated Check:	outbound_individual_id,
Table:	cc10_101_individualpackages	Campaign:	null
Team:	dai	Creby:	admin
Memo:	Doubleclick to edit		

[Export Customers](#) [Return](#)

9.3 Result

On the left menu, please go to **[Campaign]** -> **[Result]** to open the page
Call result display in agent outbound interface. When the agents finish calls with customers, they need to choose the dealing status, fill out the contact details, and call results (an overview of the call).

In the Campaign Statistics, it will list all the calling result.



The screenshot shows the 'Results' tab in the 'Campaign' section. It displays a table with columns: Name, Team, Note, Status, and a Delete button. The table lists various calling results with their respective statuses.

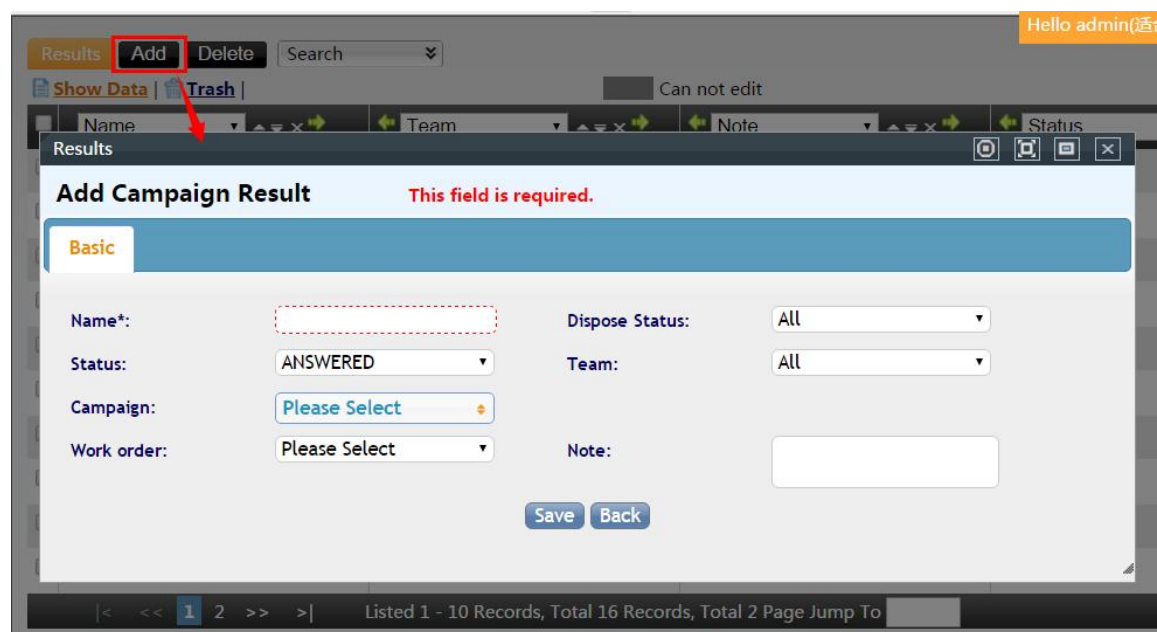
Name	Team	Note	Status	Delete
新的号码	All		NOANSWER	Delete
no valid number	UCServer		ANSWERED	Delete
发邮件	UCServer		ANSWERED	Delete
DNC	UCServer	记入禁拨黑名单	ANSWERED	Delete
无效号码	UCServer		NOANSWER	Delete
不做打算	UCServer		ANSWERED	Delete
将来考虑	UCServer		ANSWERED	Delete
准备租赁	UCServer		ANSWERED	Delete
准备自建	UCServer		ANSWERED	Delete
成功	null		ANSWERED	Delete

At the bottom, it indicates 'Listed 1 - 10 Records, Total 16 Records, Total 2 Page Jump To'.

To set a detailed calling result, and choose the corresponding result will help add value for the customer data. When it is used for the second time, it is easy to filter more effective customer, save time and improve the work efficiency.

Add

Click **【Add】** to open the Add Campaign Result page.



The screenshot shows the 'Add Campaign Result' form. It has a 'Basic' tab and a red message 'This field is required.' above the 'Name*' field. The form includes fields for Name*, Status, Campaign, Work order, Dispose Status, Team, and Note. There are 'Save' and 'Back' buttons at the bottom.

Name*: (Required field, currently empty)

Status: ANSWERED

Campaign: Please Select

Work order: Please Select

Dispose Status: All

Team: All

Note: (Empty text area)

Buttons: Save, Back

At the bottom, it indicates 'Listed 1 - 10 Records, Total 16 Records, Total 2 Page Jump To'.

Name: Name this result (eg: no answer, no interest, wrong No.)

Dispose Status: Select a status, (All, New, Pending, Success Submit, Failed Submit). Only when an agent chooses a status will the result show.

Status: Whether to show this result in the status of answered or noanswered. The agent platform will shift according to different status.

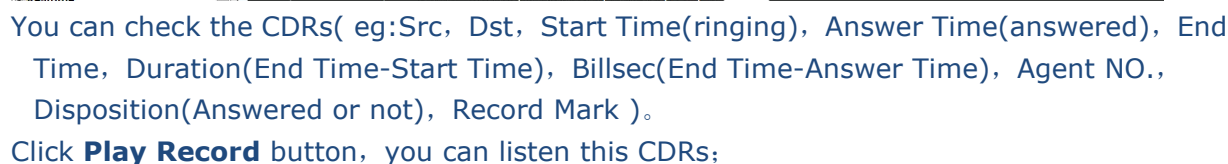
Team: To which team this result will show.

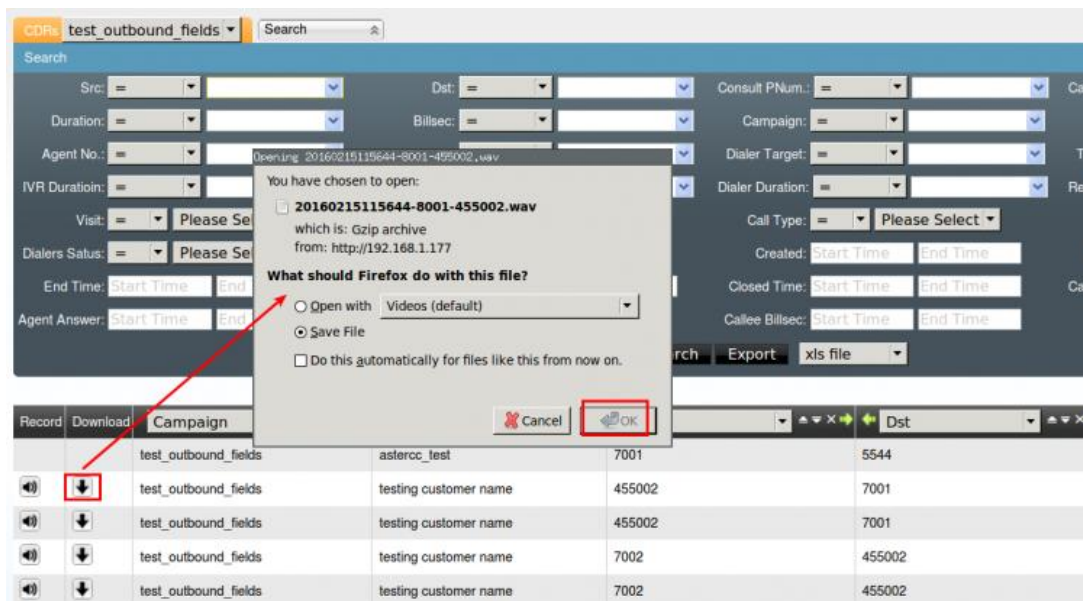
Campaign: If set a campaign, this result will only show under this campaign.

Work Order: Please select a work order.

Note: Give a note to this result.

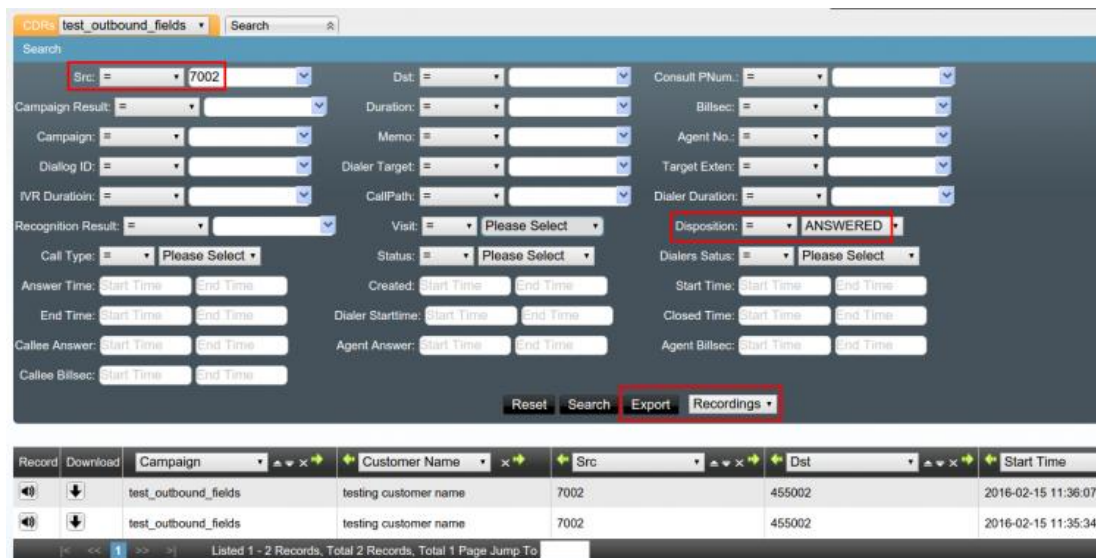
On the left menu, please go to **Campaign** -> **CDRs** to open the page





How to Bulk Export Recording

You should searching the CDRs according to conditions first, then set the exporting type to "Recordings", export the recording of CDRs via clicking the [Export] button.



After clicking [Export] button, the system settings of original recording will popup.

The default setting don't delete the original recordings after exported. You also can delete them after exporting if the space of server isn't enough.



The original recording files will be deleted if you choose "Delete".

After clicking the [OK] button, the system will jar recordings to a package on the background, then it give you a task name to downloading the recordings.

Two ways to download the recordings:

- 1、 If you set the "Monitor WebDownload" option under [System]→[Settings]→[ADVANCED SETTINGS SYSTEM] to "Yes", you can download the recording jar in [Call Center]→[Shell Exports]→[Export Jobs] on Web, you can find the jobs according to the name above.
- 2、 You also use ftp tools, enter the /var/www/html/astercc/data/monitor_download directory, you can find the recording file named suffix with "tar.gz".

Fields Introduction

Campaign:The calls from which campaigns.

Customer Name:The name of customer in customer information.

Src:The phone number of caller of this call.

Dst:The phone number of callee of this call.

Diallog ID:It is used to identity a session, it is unique in one system.

Created:It record the creation time of session, or processing time of session, sometimes it usually mark the call's starting time, it also record the saving customer information from agent, it will be the earliest time among these time, this value is little useful in our actual business.

Start Time:The starting time of call.

End Time:The ending time of call.

Dialer Starttime:The time of dialing when via the predictive-dialer.

Answer Time:The answering time of callee, it is different from "Agent Answer".

Agent Answer:Only using predictive-dialer, it isn't null, otherwise is: 0000-00-00 00:00:00.

CallPath:It is the processing of calls, eg: entersystem,queue3,AGENT:8000, it means that the call enter the astercc system, then transfer to the agent from queue.

Duration:The total duration which includes the ringing time.

Billsec:The duration between answer time and end time.

Dialer Duration:It is effective only using predictive-dialer, it is the total duration which includes the ringing time when using predictive-dialer.If you dialing manually, it is equal to: 00:00:00.

Dialer Target:The calls arrive the first target after entering the astercc system, for example: queue, IVR, device and so on.

Target Exten:The extensions' number of "Target", eg: the device's Exten is:5000, 5001,...; the queue Exten is 600, 601,

Disposition:To mark the status of calls, whether ANSWERED or NOANSWERED.

Call Type:The type of calls, include DialIn and DialOut.

Status:The customer status of this call number.

Dialers Status:The status of calling when it is end, eg: Open, Agent Answered, Call Callee, Agent Failed, and so on.

9.5 Quality Control

On the left menu, please go to[**Campaign**]-> [**Result**] to open the page.

Quality Control Customer visit Survey No Surveys QC Percent: 100% Completed: 0% Search

Search

QC Status: = Please Select Result: = Please Select QC Agent No.: =

Agent No.: = 2018 Status: = Please Select Phone: =

Address1: = Name: = cesTest: =

City: = ImportID: = Test: =

Gender: = Please Select Age: = Fax1: =

Email: = Country: = Memo: =

Input: = School: = CallResult: = Please Select

Contactmemo: = Updated: Start Time End Time Created: Start Time End Time

Reset Search Export xls file

Record	Download	CDRs	Quality Action	QC Rate	Agent No.	Dialout Count	answermum	QC St
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	<input type="button" value="QC Rate"/>	2018	1	1	No
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	<input type="button" value="QC Rate"/>	2018	0	0	No
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	<input type="button" value="QC Rate"/>	2018	1	1	No
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	<input type="button" value="QC Rate"/>	2018	0	0	No
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	<input type="button" value="QC Rate"/>	2018	2	2	No

Listed 1 - 5 Records, Total 5 Records, Total 1 Page Jump To

- Select campaign and survey(if it has one), then it will list all submitted records
- For each record, it has three parts, QC action, Customer Information, Survey
- **Recording** If agent talked to customer, you will see recording icon, click the icon you can listen to the conversation

Play Recording

(00:05) stopped

address1	phone1	individualname	phone2	shixuebao	mslt	selectCompound	test_datetime	test_date	test_da
	1986344512	3453	435435		China	Yes	0000-00-00 00:00:00		

Question	Answer
Q1 Your?	
Q2 what?	
Q6 How?	
Q4 Where?	Q4 Option One
Q3 Who?	Q3 Option One
Q5	Q5 Option One

- In the same page, you can read customer and survey information.
- **View**, when there're several conversation in the conversation(as transfer), you can listen to specific recording.

QC Status: Result: QC Agent No.:

Agent No.: Status: Phone:

Address1: Name: OutboundIndividual:

OutboundIndividual:

test_date1:

City:

Gender:

Email:

Flag:

input:

Contactmemo:

OutboundIndividual:

test_datetime:

Quality Control

CDRs

Record	Download	Src	Dst	Agent No.	Start Time	Answer Time	End Time	Duration	Billsec	Target	D
<input type="text" value="2227"/>	<input type="text" value="1986"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-12-05 09:51:06	2012-12-05 09:51:09	2012-12-05 09:51:15	9	6	MainCdrA	<input type="text" value=""/>
<input type="text" value="1986"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-08-16 17:36:14	2012-08-16 17:36:24	2012-08-16 17:36:35	11	11	MainCdrA	<input type="text" value=""/>
<input type="text" value="2227"/>	<input type="text" value="1986"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-09-02 17:46:47	2012-09-02 17:46:49	2012-09-02 17:55:21	512	512	MainCdrA	<input type="text" value=""/>
<input type="text" value="1986"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-08-16 16:13:19	2012-08-16 16:13:31	2012-08-16 16:13:54	23	23	MainCdrA	<input type="text" value=""/>
<input type="text" value="2227"/>	<input type="text" value="1986"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-12-05 09:51:55	2012-12-05 09:51:58	2012-12-05 09:52:31	33	33	MainCdrA	<input type="text" value=""/>
<input type="text" value="2227"/>	<input type="text" value="5000"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-07-10 16:22:47	2012-07-10 16:22:57	2012-07-10 16:23:20	23	23	MainCdrA	<input type="text" value=""/>
<input type="text" value="2227"/>	<input type="text" value="1002"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-06-21 17:00:47	2012-06-21 17:00:52	2012-06-21 17:01:01	14	9	MainCdrA	<input type="text" value=""/>
<input type="text" value="2227"/>	<input type="text" value="1986"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-07-17 16:16:28	2012-07-17 16:16:37	2012-07-17 16:16:46	18	9	MainCdrA	<input type="text" value=""/>
<input type="text" value="2227"/>	<input type="text" value="5000"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-07-17 15:19:08	2012-07-17 15:19:31	2012-07-17 15:19:32	24	1	MainCdrA	<input type="text" value=""/>
<input type="text" value="2227"/>	<input type="text" value="1986"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-07-17 15:25:15	2012-07-17 15:25:19	2012-07-17 15:25:25	10	6	MainCdrA	<input type="text" value=""/>
<input type="text" value="1986"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	2012-08-16 13:16:14	2012-08-16 13:16:22	2012-08-16 13:16:28	14	6	MainCdrA	<input type="text" value=""/>

Back

Record	Download	CDRs	Quality Action	QC Rate	Agent No.	Dialout Count	answernum
<input type="text" value="2227"/>	<input type="text" value="1986"/>	<input type="text" value="2227"/>	Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	<input type="button" value="QC Rate"/>	2227	72	72
<input type="text" value="1986"/>	<input type="text" value="2227"/>	<input type="text" value="2227"/>	Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	<input type="button" value="QC Rate"/>	2227	25	25
<input type="text" value="2227"/>	<input type="text" value="1986"/>	<input type="text" value="2227"/>	Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	<input type="button" value="QC Rate"/>	2227	22	22

Listed 1 - 3 Records, Total 3 Records, Total 1 Page Jump To

Quality Action

Qualified: ☐ Yes ☐ No

Qualified: ☐ Yes ☐ No

Qualified: ☐ Yes ☒ No

- Click QC passed or failed
- If you want to rate the record, click "QC Rate" button

Quality Control

Quality Control

Play Record

QC Standard

- ☐ 10 The use of polite language
- ☐ 5 No spoken language or the colloquial phenomenon
- ☐ 5 To be submitted to the opening or closing remarks
- ☐ 10 And call no questions asked, and imperative
- ☐ 10 Not interrupted the customers speak and kibitz phenomenon
- ☐ 10 Active response to the client, service enthusiasm; at the right time to ask questions to obtain customer information, no ice
- ☐ 10 Call in all patience and eager to hang up phenomenon

Save Back

- For rate item, you can config in [\[qcrates\]](#)

How to export success submit recordings

- First set the condition, select campaign and survey(if it has), then in Status, select "Success Submit", in QC Status, select "Yes"

Quality Control Customer visit Survey test2 QC Percent 100 Completed 0 Search

Search

QC Status: = Please Select Result: = Please Select QC Agent No.: =

Agent No. = Status = Success Closec Phone: =

Address1 = Name = OutboundIndividual shouebao: =

City: = ImportID = OutboundIndividual test: =

Gender: = Please Select Age = Fax1: =

Email: = Country: = Memo: =

input: = OutboundIndividual school: = CallResult: = Please Select

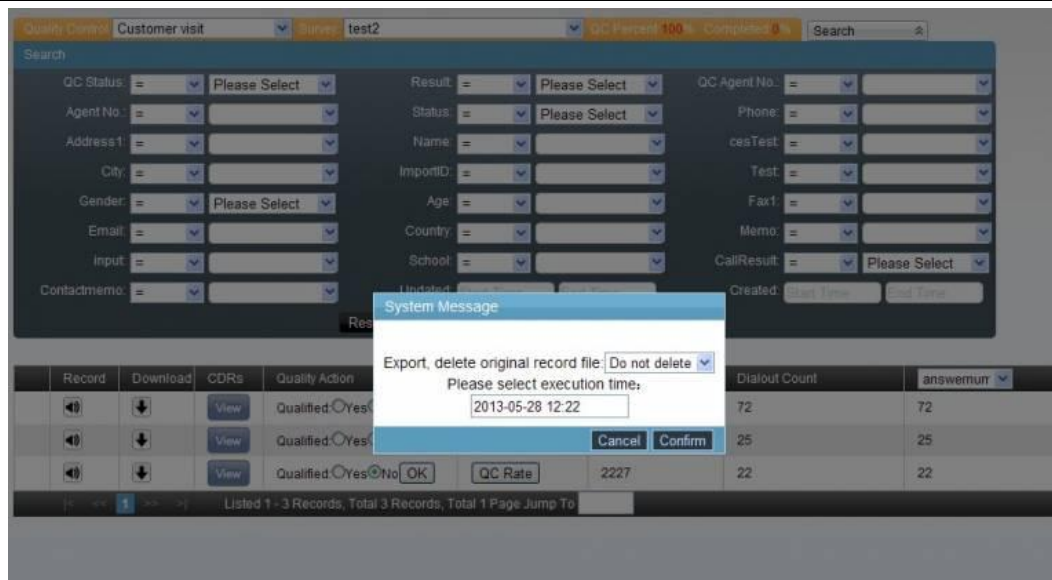
Contactmemo: = Updated: Start Time End Time Created: Start Time End Time

Reset Search Export Recordings

Record	Download	CDRs	Quality Action	QC Rate	Agent No.	Dialout Count	answernum
		View	Qualified: <input type="radio"/> Yes <input type="radio"/> No OK	QC Rate	2227	72	72
		View	Qualified: <input type="radio"/> Yes <input type="radio"/> No OK	QC Rate	2227	25	25
		View	Qualified: <input type="radio"/> Yes <input type="radio"/> No OK	QC Rate	2227	22	22

Listed 1 - 3 Records, Total 3 Records, Total 1 Page Jump To

- after Export button, select "Recording", then click Export



Quality Control Customer visit Survey test2 QC Percent: 100% Completed: 0%

Search

QC Status: Please Select Result: Please Select QC Agent No.:
 Agent No.: Status: Please Select Phone:
 Address1: Name: cesTest:
 City: ImportID: Test:
 Gender: Please Select Age: Fax1:
 Email: Country: Memo:
 Input: School: CallResult: Please Select
 Contactmemo: Created: Last Time Last Time

System Message

Export, delete original record file: Do not delete
 Please select execution time:
 2013-05-28 12:22
 Cancel Confirm

Record	Download	CDRs	Quality Action	Dialout Count	answerum
1	View	Qualified: Yes	OK	72	72
2	View	Qualified: Yes	OK	25	25
3	View	Qualified: Yes	OK	22	22

Listed 1 - 3 Records, Total 3 Records, Total 1 Page Jump To

- System will prompt exporting setting, the time or if you want to remove recordings when export is done(not by default)
- After save, system will give you the name of the exported file



System Message

Export monitor shellplan create successfully! Please remember the folder name (qcpages_20130528122249_admin), so you can find the download monitor file package when you need

Back OK

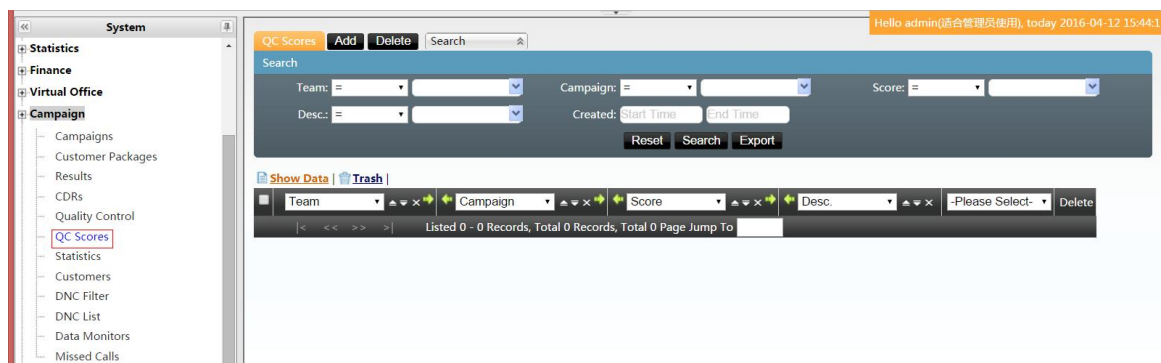
- Download
- If you enabled Web download, you can go to Call Center → Export to download
- If you want to use ftp, please go to /var/www/html/asterCC/data/monitor_download



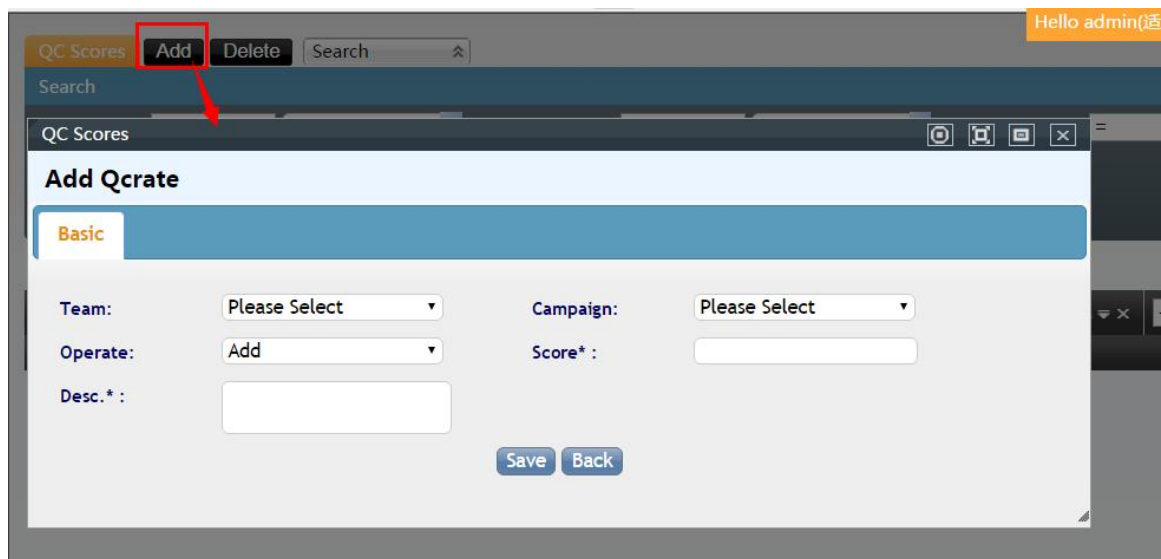
It will only export the fields you configured in campaign → background fields

9.6 QC Scores

On the left menu, please go to **[Campaign]** → **[QC Scores]** to open the page.



Click the [Add] button, open the QC Scores' add page, add one score.



Team: optional, do not select the team, it will effect all the team. On the Quality Control page, all the team's quality inspector will see this score.

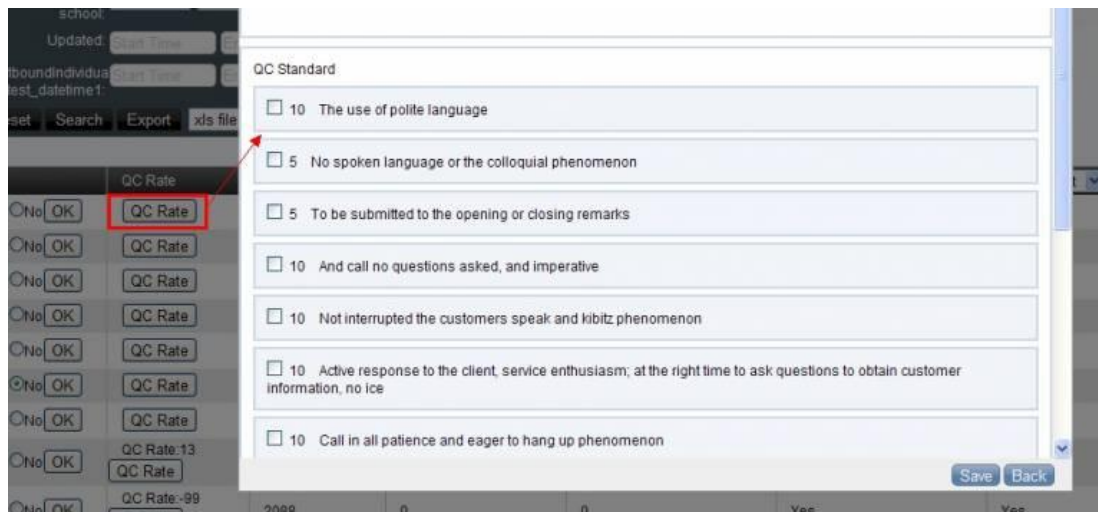
Campaign: If choose one campaign, the score will effect this campaign, the quality inspector will see this score when quality the chosen campaign.

Operate: Include `Add` and `Reduce`. Generally, all the scores will be belonged to one operate, should not add the duplicate scores for two different operation.

Score: Just for number, it will be used to add or reduce scores.

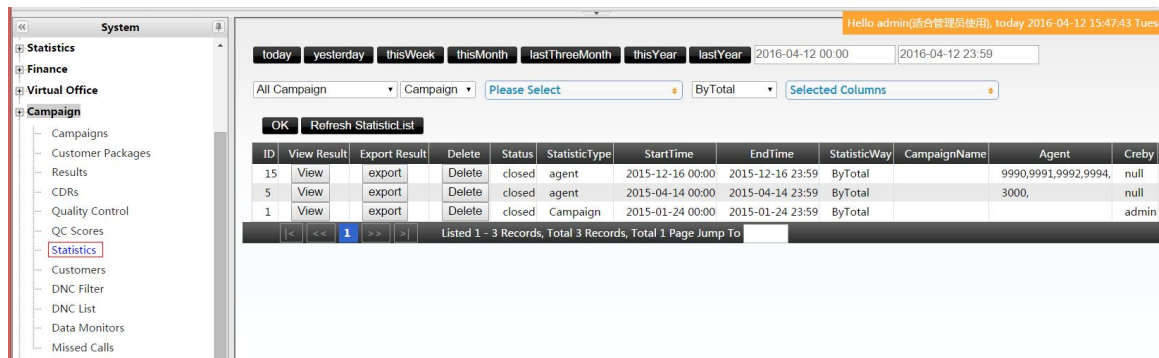
Desc.: The description of this score, give the reason.

Finished, click the save button. Then go to the [QC Control] to see whether the score is used.



9.7 Statistics

On the left menu, please go to **[Campaign]** -> **[Statistics]** to open the page.



As shown above,

The first line is for time range choosing. You need to set the time range during which the statistics are being analysed (the system chooses that date by default).

The second line is the statistic conditions.

The first pull-down box is for the statistic method, is by Campaign (mainly by campaign, it lists all agents in the campaign and the total number), or by Agent(it lists the chosen agent's performance in his campaign).

The second pull-down box is for the view range (choose the campaign for the statistics), on all campaigns or a specific one.

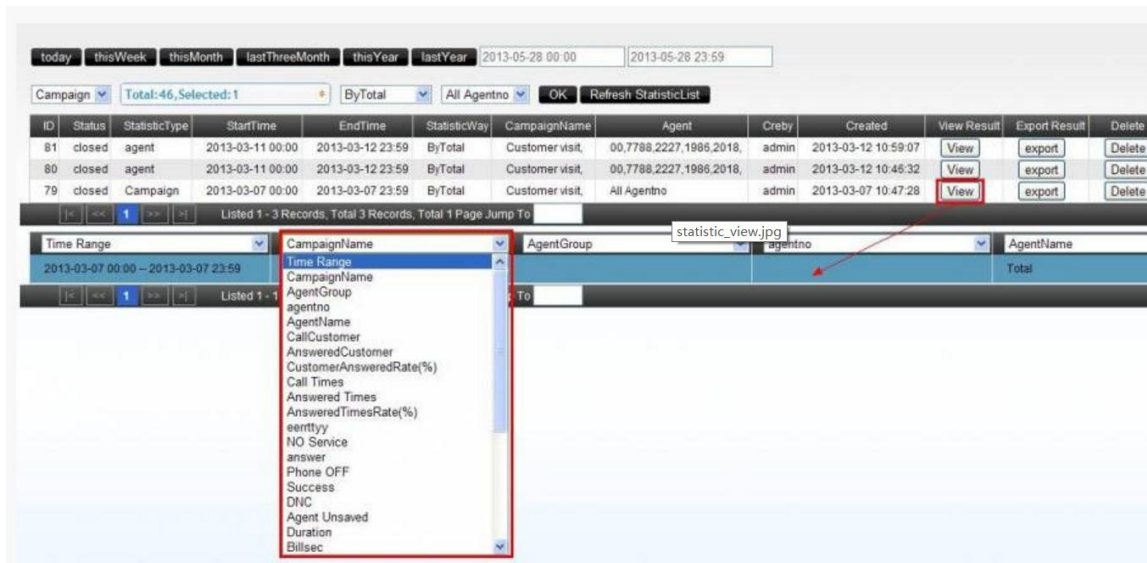
The third pull-down box is for the output form of the statistic statement, which is by total, year, quarter, month, week, day or hour.

When finishing setting, click OK to establish the statistic task. Because of the huge amount of information, the system will stat in the background.

When it is established, it will be shown on the table below. Click Refresh Statistic list to check the process. When the status is closed, the result can be seen or exported.

ID	View Result	Export Result	Delete	Status	StatisticType	StartTime	EndTime	StatisticWay	CampaignName	Agent	Creby
15	View	export	Delete	closed	agent	2015-12-16 00:00	2015-12-16 23:59	ByTotal		9990,9991,9992,9994,	null

Click View and see the results:



Time range: The time range of this piece of data.

Agent name: The last name of the agent account.

Call customer: The number of customers the agent called. (if he called one customer ten times, the number here still is one.)

Answered customer: The number of customers who answered the call. (if he called one customer 5 times, and the customer answered four times, the number here still is one.)

Customer answered rate: Answered customer/call customer

Call times: The time that the agent called.(If he called one customer five times, the call times would be five.)

Answered times: The time that the calls were answered (If he called one customer ten times, and the customer answered five time, the number here is five.)

Answered times rate: Answered times/Call times

Call Results: It lists how many times this "call results" are saved by agents, "call results" might be different different depends on the campaign.

Agent Unsaved: If the agent did not save the contact record (there is no call result in the record), then the result will become unsaved by default.

Duration: During this time, how much time agents spent on phone (including ringing and talking)

Billsec: During this time, how much time agents talked

Invalid Number: The number of no answered calls

Invalid Rate: Invalid Number/Customer number

Callback Number: Total number when agent save a customer with status pending

Callback Rate: Callback Number/Customer Called

Practical Success Number: The success customer number after QC

Conversation Rate: Practical Success Number/Answered Customer Number

Success Rate: Practical Success Number/Called Customer Number

QC Success Number: No matter the customer status, the number passed quality control

Agent Submit Success Number: The number of customer with status "Success Submit"

Submit Success and QC: The number of customer with status "Success Submit" and checked in QC

Submit Success and QC Success: The number of customer with status "Success Submit" and passed in QC

Submit Success and QC Failed: The number of customer with status "Success Submit" but failed in QC

9.8 Customers

On the left menu, please go to **[Campaign]** -> **[Customer]** to open the page.

Module Function: To check the detail customer info of a Customer package

Add

The fields are corresponding to Campaign background display fields(editable) and order. After finish, click Save to save the data. The new added data will show on the list.

Edit

Customers Gms Add Delete Delete All By Conditions ☒ Delete only the predictive dialer list customer

Search

Customers

Edit Campaign Customer

Basic

custom0_127: Doubleclick to ... phone1*: 100856

custom2_128: Doubleclick to ... phone2: Doubleclick to ...

flag: Doubleclick to ... Status: open

Dialer Status: Open memo: Doubleclick to edit ...

Back

<input type="checkbox"/> open	Open	100856
<input type="checkbox"/> open	Agent Answered	余小琼 13816863425
<input type="checkbox"/> open	Agent Answered	客服中心 10086

< << 1 >> > Listed 1 - 3 Records, Total 3 Records, Total 1 Page Jump To

The fields are corresponding to Campaign background display fields(editable) and order. Only for those fields which set editable on the campaign background can be editable in this page.

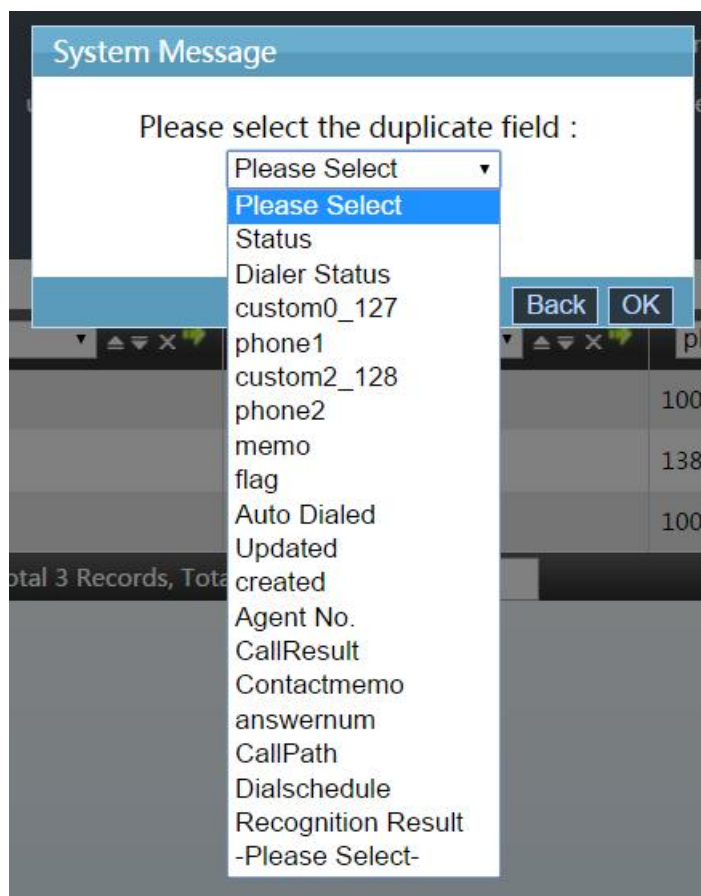
Duplicate data check

Click **Duplicate data check** to check the duplicate data.

Customers Gms Add Delete Delete All By Conditions ☒ Delete only the predictive dialer list customer Duplicate data check

Search

Hello admin(适合管理员使用), today 2016-0



Select the duplicated field.

Delete



When select the records listed on the page, then click Delete or Delete All condition, only delete predial list customer data in Campaign, not including the customer package data. If not click the record, it will delete predial list data and the customer package data at the same time.

Delete

Click Delete to delete all the customers' data listed below.

Delete all by condition

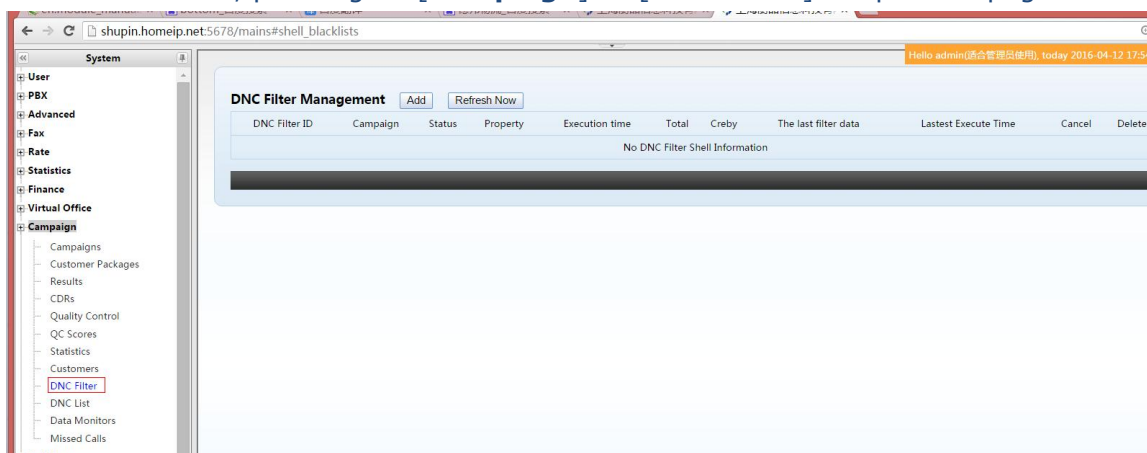
Delete the customer data by condition.



For those data showing up by click 'Duplicated Data Check' button, please use 'Delete all by condition' carefully. As it will delete all the data match the conditions, not only those show on the page. Click 'Search' before delete.

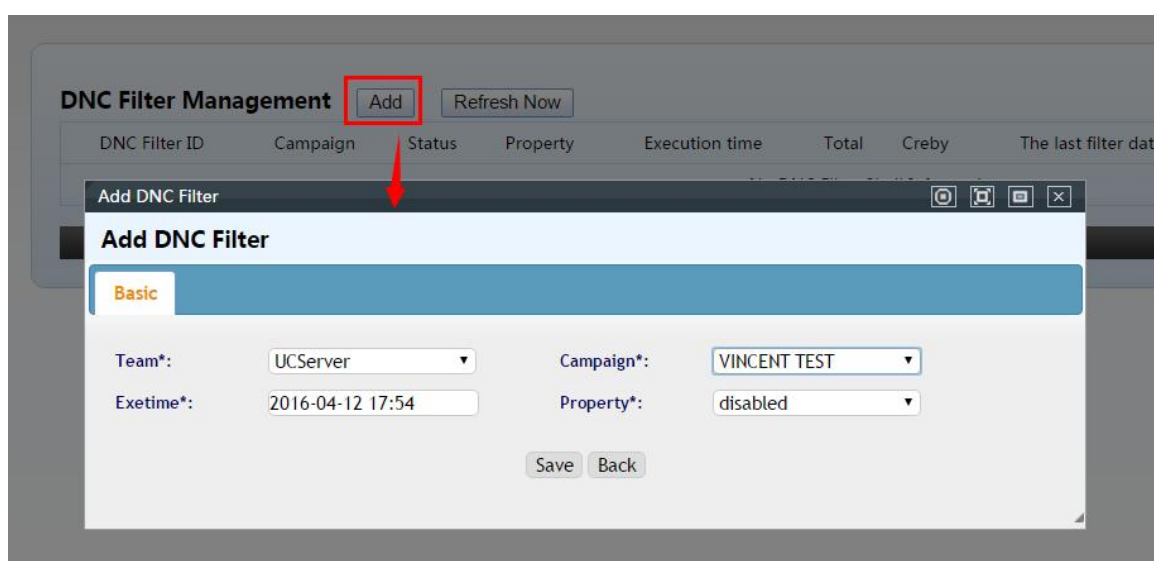
9.9 DNC Filter

On the left menu, please go to **[Campaign]** -> **[DNC Filter]** to open the page.



Module Functions: To have a DNC filter plan for a campaign. With the help of DNC list, you can filter numbers from a customer package.

Add



Team: To which team this DNC belongs to;

Campaign: Select a campaign;

Exetime: To select a fixed time to do the filter;

Property: The status of filter plan;

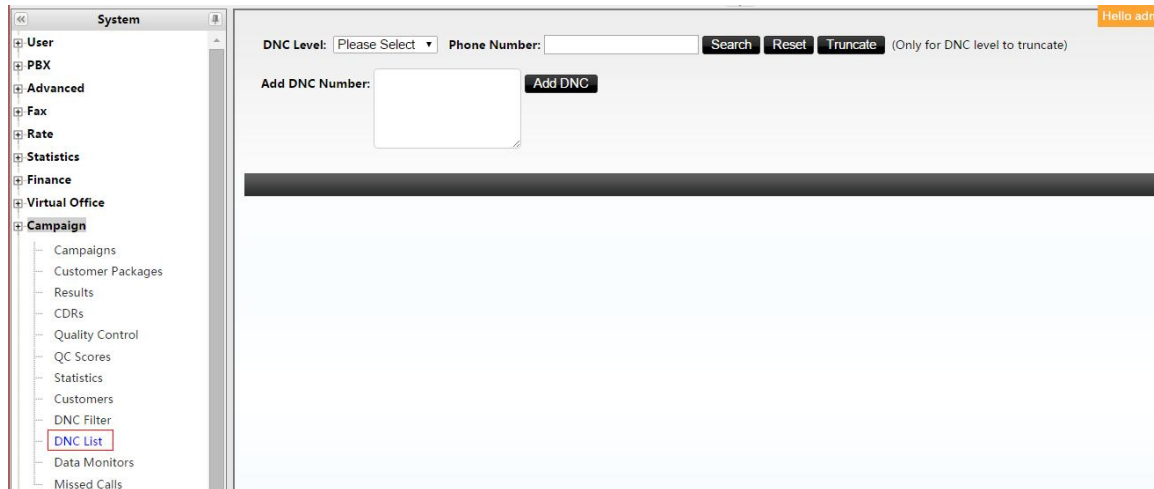
Click **[Save]** when finishing the page, then it will show the newly added data on the page.

Edit

You can double click the field to re-open the edit page and edit them. After reset the Exetime, the data will become a new one. For those used filter, you can download it in the list.

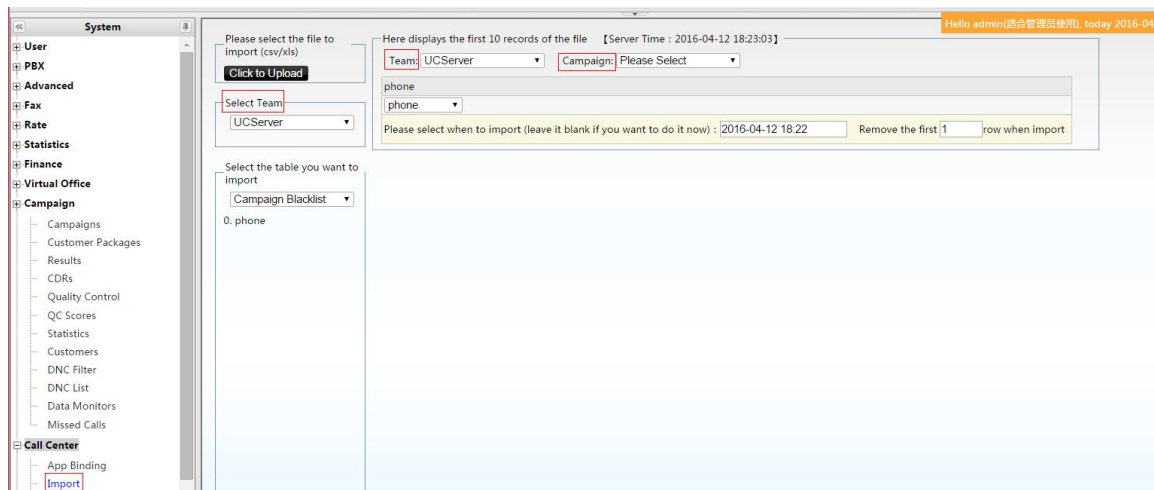
9.10 DNC List

On the left menu, please go to **[Campaign]** -> **[DNC List]** to open the page.



Import

You can import DNC list Under **[Call Center]** -> **[Import]**:



On the left menu, select the Campaign Blacklist, then on the left select a team and campaign.

- If leave Team and Campaign blank, the import blacklist will be system level to filter all calls.
- If only select a team, the import blacklist will be team level to filter calls in this team.
- If select a team and a campaign, the import blacklist will be campaign level to filter calls in this campaign.

When finish, Click To Upload. A new data will show up under DNC list after uploading. 执行导入会提交一个 导入计划来由后台执行 黑名单的导入操作, 参见[导入计划管理](#)

如果后台执行导入成功后, 可以在 外呼营销模块下的禁拨黑名单页面进行查看 已经存在的禁拨黑名单数据

禁拨黑名单的查看



You can check the blacklist according to different DNC Level(System,Team,Campaign)

DNC Level: Phone Number: (Only for DNC level to truncate)

Add DNC Number:

9.11 Data Monitors

On the left menu, please go to **[Campaign]** -> **[Data Monitors]** to open the page.

Campaign Name	Customer Total	Import Total	Dialed Total	Success Total	Undialed Total	Diallist Total	Last Recover Date	Revocer Count
aaaa	0	0	0	0	0	0	0000-00-00 00:00:00	0
VINCENT TEST	0	0	0	0	0	0	0000-00-00 00:00:00	0
VT	0	0	0	0	0	0	0000-00-00 00:00:00	0

Module Function: can view the detail of campaign by this page

Select the campaign's multi checkbox, can choose the campaign to view the details of chosen campaign.

Choose the `Customer visit` campaign

Campaign Name	Customer Total	Import Total	Dialed Total	Success Total	Undialed Total	Diallist Total	Last Recover Date	Revocer Count
aaaa	0	0	0	0	0	0	0000-00-00 00:00:00	0
VINCENT TEST	0	0	0	0	0	0	0000-00-00 00:00:00	0
VT	0	0	0	0	0	0	0000-00-00 00:00:00	0

If want to choose many campaigns, every campaign will be divided into line to show the detail

Customer Total: the total in the customerpackage of current campaign

Import Total: the number of customers in the customerpackage by import

Dialed Total: the number of customers had been dialed

Success Total: the number of customers' status is `successclosed` which had been dialed

Undialed Total: the number of customers have not been dialed

Diallist Total: the number of customers in the campaign diallist belong to the current campaign.If the campaign disabled the dialer,it will show 0.

Last Recover Date:the time which last recovered customer for the campaign diallist

Revocer Count:recover customer count

9.12 Missed Calls(未完)

On the left menu, please go to[**Campaign**]-> [**Missed Calls**] to open the page.

Module Function:

10 Call Center

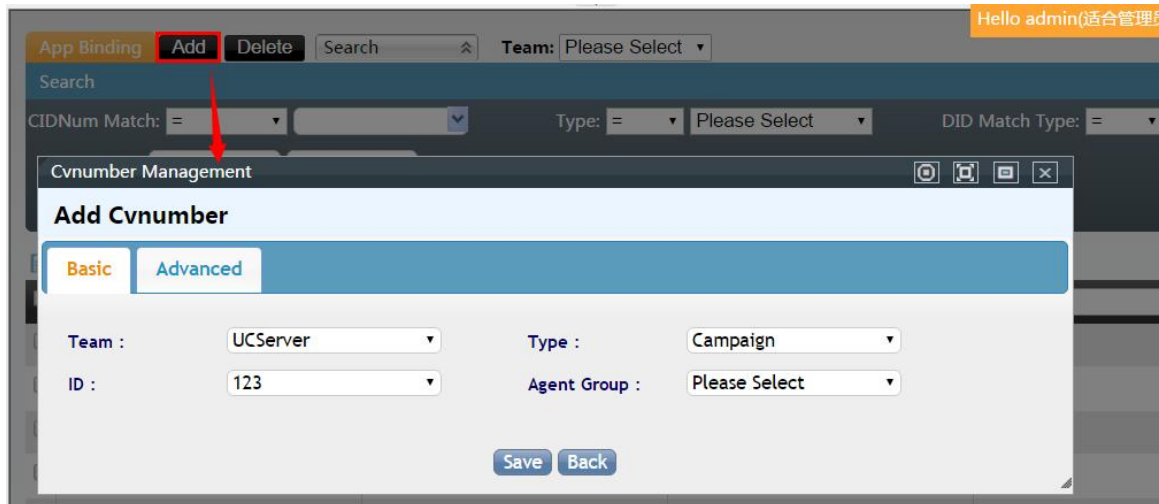
10.1 App Binding

On the left menu, please go to[**Call Center**]-> [**App Binding**] to open the page.

Team	Type	ID	Priority	Delete
UCServer	Campaign	测试外呼	0	Delete
andy测试	Campaign	外呼任务1	0	Delete
eason	CustomerService	呼入客户-e	0	Delete
GMS	Campaign	Gms	0	Delete
厦门测试	Campaign	厦门外呼	0	Delete
UCServer	CustomerService	测试呼入客服	0	Delete
UCServer	Campaign	测试客户唯一	0	Delete
UCServer	CustomerService	UCServer呼入客服	0	Delete

Module Function: The function of module is binding the application and DID together, the application includes: Virtual office, Campaign and Customer Service. It can implement the popup when dialing in.

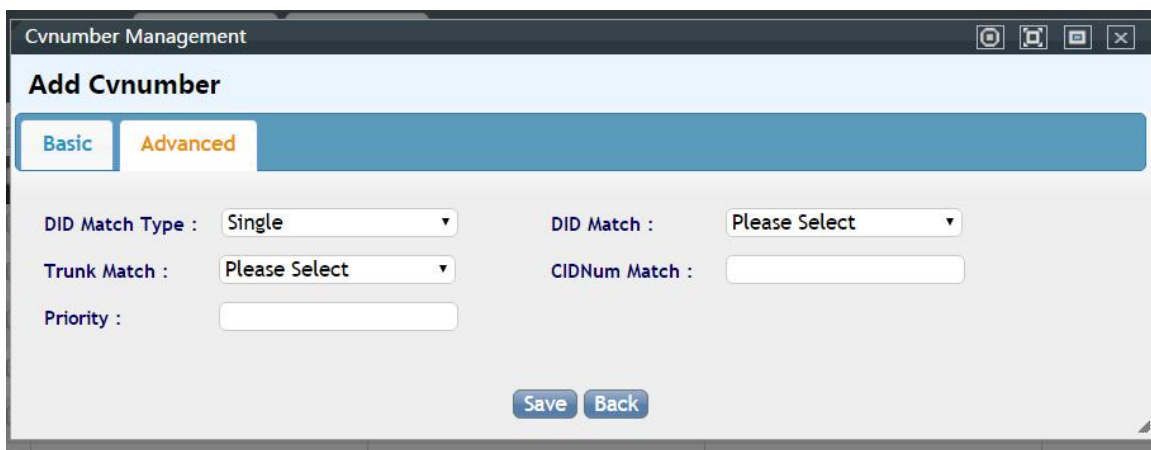
Assign the Application



Team, Type and **ID** are interrelated, they can help you select the target of application, and you can bind it with DID or Trunk setting under "Advanced" tag.

Agent Group: The application of virtual or customer service can be undertaken by several agent groups, you can also assign a fixed agent group to undertake the application. It will trigger the default agent group if you select nothing here.

How to Bind



DID Match Type and **DID Match:** We can bind one or several DID numbers with application.

What's DID number? If the company has a customer service department, the customer should dial a phone number into it, we call the phone number a DID number. The system will prompt the application automatically to agent via match DID number.

Trunk Match: Select the matching type of trunk. Maybe you have several trunks, but we can only bind one trunk to application here.

CIDNum Match: Whether bind the caller ID to this application.

Priority: Set the priority of application binding among all app bindings. The larger the value the more priority.

You can combined more than one conditions to limit application binding, for example: you can use the united limits likes DID, Trunk and CIDNum to binding a application.

The Default App Binding

Sometimes, we can use device to work as Agent Mode directly. To simplify operation, we can bind a default application to Agent Groups. That is to say, not only as the agent, but also as device, the group will work for a default application if we set the "App Binding" before.

10.2 Import

On the left menu, please go to **[Call Center]** -> **[Import]** to open the page.

Module Function: With import function, you can import data to system

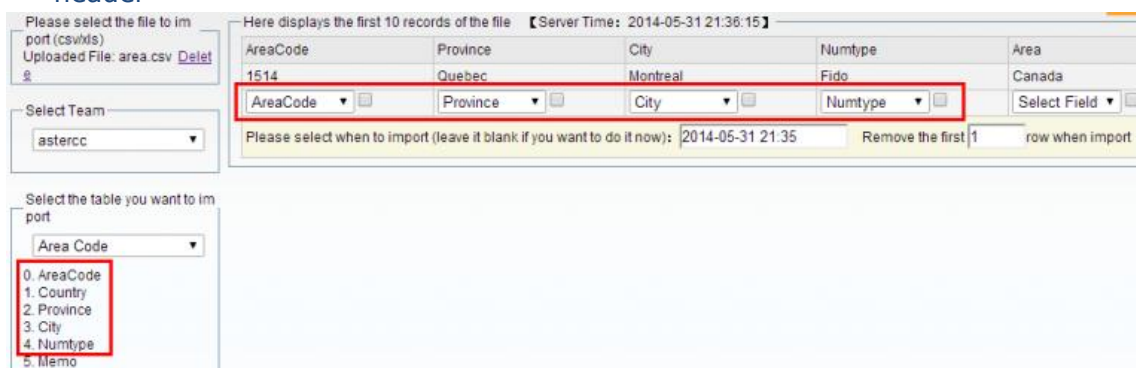
- Make sure you select the team you want to import the data to
- click "Click to Upload" button, system support csv or xls file, make sure it's UTF-8 when using csv file
- after uploading finished, it will appear the file information on right panel, if you want to upload another file, just click the "delete" link

- On right panel, it will give you the first 10 records in the file

- Select which table you want to import the file to, including
- mass target customer table – used for batch email & sms
- individual customer table – main table for individual customers
- organization customer table – main table for organization customers
- campaign blacklist – a Do Not Call list for campaigns
- area code – used to put some information based on phone prefix, list phone area, timezone, etc
- DID – to import did numbers
- black list – numbers you don't want them to dial in
- white list – numbers you only want them to dial in
- campaign customers

Import

- After importing, select the table your want to import to, system will try to match the header



Please select the file to import (csv/xls)
 Uploaded File: area.csv [Delete](#)

Select Team
 astercc

Select the table you want to import
 Area Code

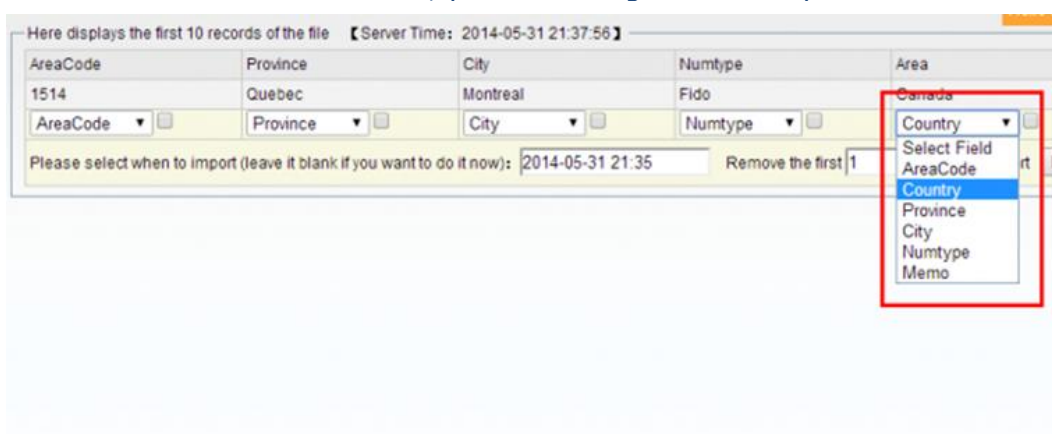
0. AreaCode
 1. Country
 2. Province
 3. City
 4. Numtype
 5. Memo

Here displays the first 10 records of the file 【Server Time: 2014-05-31 21:36:15】

AreaCode	Province	City	Numtype	Area
1514	Quebec	Montreal	Fido	Canada

Please select when to import (leave it blank if you want to do it now): 2014-05-31 21:35 Remove the first 1 row when import

- If the header doesn't match, you can change it manually



Here displays the first 10 records of the file 【Server Time: 2014-05-31 21:37:56】

AreaCode	Province	City	Numtype	Area
1514	Quebec	Montreal	Fido	Canada

Please select when to import (leave it blank if you want to do it now): 2014-05-31 21:35 Remove the first 1 row when import

Country
 Select Field
 AreaCode
 Country
 Province
 City
 Numtype
 Memo

- System gives the option to set a import time and remove top records

Here displays the first 10 records of the file **【Server Time: 2014-05-31 21:42:10】**

AreaCode	Province	City	Numtype	Area
1514	Quebec	Montreal	Fido	Canada
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please select when to import (leave it blank if you want to do it now): Remove the first row when import



If your import job is not processed in 1 minute, please make sure your server time is correct

- You can go to Call Center → Shell Jobs to check import process

System Server Time: 2014-05-28 02:51:08

Import Jobs

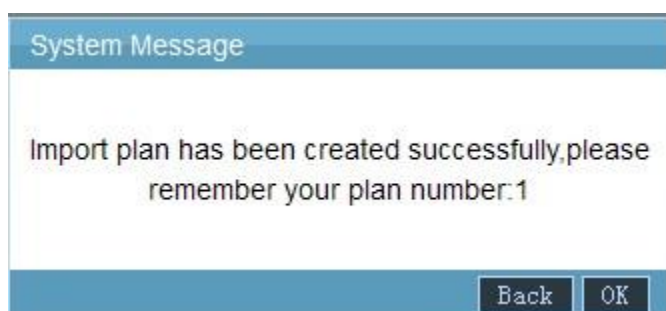
ID	Target	Filename	Status	Total	Success	Error	Duplicate	Success Rate	Executed At	Creby	Success Data	Error Data	Duplicated Data	Original Data	Delete
6	sales leads	customers.csv	Import	0	0	0	0	0%	2014-05-28 22:40:00	admin					<input type="button" value="Delete"/>
5	leads5	customers.csv	Closed	540	440	86	14	81%	2014-05-25 23:52:00	admin	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>
4	leads4	customers.csv	Closed	540	440	86	14	81%	2014-05-25 22:31:00	admin	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>
3	leads3	customers.csv	Closed	540	440	86	14	81%	2014-05-25 22:14:00	admin	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>
2	leads	customers.csv	Closed	540	440	86	14	81%	2014-05-25 21:51:00	admin	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>

- Click [Import], you probably see this alert

System Message

The file you want to import does not have same name as the package, click OK to continue?

- You see the alert because the file name doesn't match the customer package name, it's to avoid the import mistake between the file and the customer package
- If you are sure all are good, click [OK] to continue



- System will give you the ID of the job, go to [call_center] → [shell_jobs], you can see all import process, when status is "close", means the job is done.
- In this page, you can download
- Success Data
- Error Data
- Duplicated Data
- Original Data
- When there're duplicated records or error records, you can download the file to check what's wrong.

【Server Time: 2014-05-31 21:46:23】

Import Jobs [Refresh Now](#)

ID	Target	Filename	Status	Total	Success	Error	Duplicate	Success Rate	Executed At	Creby	Success Data	Error Data	Duplicated Data	Original Data	Delete
3	phonearea	area.csv	Closed	1	1	0	0	100%	2014-05-31 21:35:00	admin	Download			Download	Delete
2	Customer Care	customers.csv	Closed	540	440	86	14	81%	2014-05-31 20:22:00	admin	Download	Download	Download	Download	Delete
1	客户关怀	customers.csv	Closed	540	440	86	14	81%	2014-05-31 13:44:00	admin	Download	Download	Download	Download	Delete

< << 1 >> >

Import & Start

- From version 2.1, we provide a new features named "Import & Start", for a new campaign or new main table, system will create all fields based on the file you import, you don't need to set customized fields and change orders any more.

Please select the file to import (csv/xls)

[Click to Upload](#)

Select Team

eason

Select the table you want to import

Organization CustomerTable

Here displays the first 10 records of the file 【Server Time : 2016-04-13 10:11:42】

organizationname	organizationtype	legalrepresentative
organization	organization	legalrepresente

Please select when to import (leave it blank if you want to do it now) : 2016-04-13 10:11 Remove the first 1 row when import

☐ Import & Start

- Click "Import & Start", you will see system will create the fields based on the header

Time: 2014-05-26 02:46:00

Email	Company	Address1	Address2	City	Province	Province
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	St-Laurent	Quebec	QC
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Calgary	Alberta	AB
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Terrebonne	Quebec	QC
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	LaSalle	Quebec	QC
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Mississauga	Ontario	ON
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	montreal	Quebec	QC
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Hastings	Ontario	ON
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Montréal	Quebec	QC
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Mascouche	Quebec	QC

Use as ema...
 -Select Field-
 Regular
 Use as phone
 Use as email
 Use as fax
 Use as address

Regular
 -Dialer Setting-
 Regular
 -Dialer Setting-
 Regular
 -Dialer Setting-
 Regular
 -Dialer Setting-
 Regular
 -Dialer Setting-

Remove the first 1 row when import

Import

- In your header, it will try to match some special fields, you can adjust if it's wrong
- Email – show email icon
- Phone – show click to call icon and sms icon
- Fax – show fax icon
- Address – show map icon
- Go to Campaign → Campaign to adjust agent view if you want

System

Campaign Management

Edit Campaign

Basic Advanced Adv-Setting

Campaign #: sales leads

Priority: Common

Customer Package: sales leads

Worktime: Any Time

Agent Get Customer: No

Agent Group #: 600

Allow Add New: Yes

Default Status: New

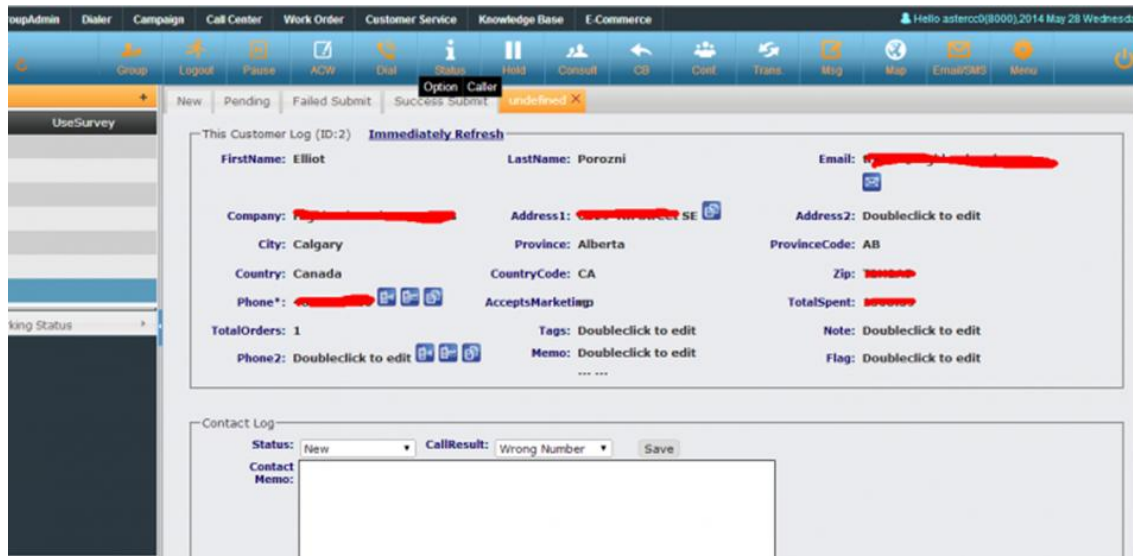
Report Alias Background Fields Agent Field Add Fields

Fieldset

EditField

FieldDisplay	Check All	Check All	Check All
FirstName	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
LastName	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Email	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Company	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Address1	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Address2	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
City	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Province	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
ProvinceCode	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Country	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
CountryCode	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Zip	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Phone	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Required
AcceptsMarketing	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
TotalSpent	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required

- Login as agent, check the customer information, you will see it's exactly same as the data you imported.



- When you try to import another file to same campaign, you will see the header will match by itself

Here displays the first 10 records of the file 【Server Time: 2014-05-31 21:51:57】

First Name	Last Name	Email	Company	Address1	Address2	City	Province	
Maria	Mattia	mmattia@incotel-gh.com	Incotel-QH IP Solutions	2397 Guenette		St-Laurent	Quebec	P
Elliot	Porozni	trevor@highlanderwine.com	Highlander Wine & Spirits	6028 4th Street SE		Calgary	Alberta	A
David	Allain	dallain@promenu.com	CMR progiciels	1150 Lévis	bureau 201	Terrebonne	Quebec	C
Minh-Man	Bui	minhbui@hotmail.com		846 Lussier		LaSalle	Quebec	C
Mahmoud	Badran	mabadran@hotmail.ca		7250 Triumph Lane		Mississauga	Ontario	C
g	m	g.moise@outlook.com	gm	6774		montreal	Quebec	C
Karen	Brodie	kfb29@msn.com		P.O.57	21 Rosecliff Court	Hastings	Ontario	C
Dan	Hanganu	h.sambault@hanganu.com	Dan S Hanganu Architecte	404 St-Dizier		Montréal	Quebec	C
Mathieu	Therault	mtorio@gmail.com		2358 Francois-Villon		Mascouche	Quebec	C

Please select when to import (leave it blank if you want to do it now): 2014-05-31 21:51 Remove the first 1 row when import Import

Reset Agent Yes Reset Customer Status No Customer Duplicate Skip Import to diallist when duplicated Ignore Duplicated

Options when import to customer package

- Reset Customer Status
- When set to Yes, if the customer is duplicated, their status will be reset to New
- Customer Duplicate
- Skip: Don't insert if duplicated customer found
- Update: Update customer information if duplicated customer found

Options when using predictive dialer

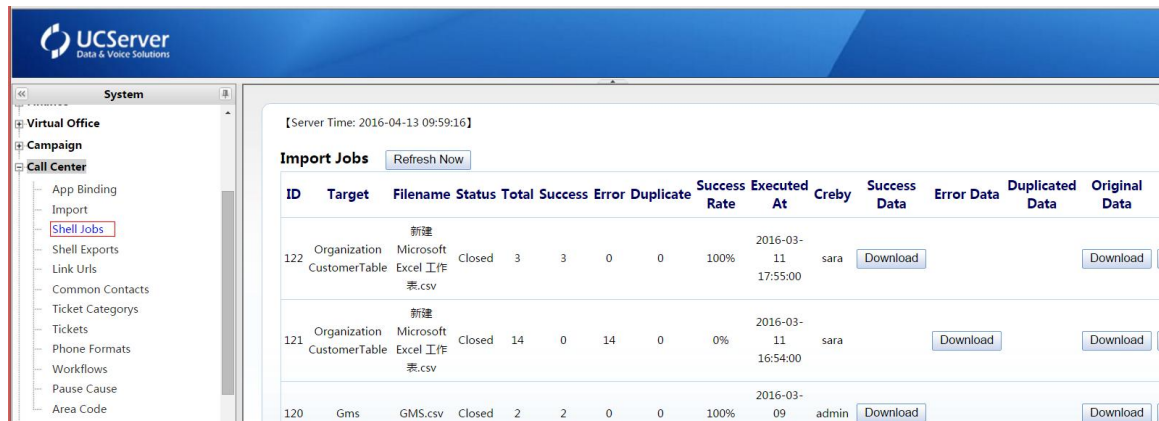
- When the campaign is using predictive dialer, it would have another line for dialer
- Pre dialing Phone field: the number you want to import to predictive dialer list
- Dialer Priority: customer priority in predictive dialer
- Dialer Scheduler: time to dial

Country Code	Zip	Phone	Accepts Marketing	Total Spent	Total Orders	Tags
CA	H4R 2E9	5147456000 x302	yes	723.66	1	
CA	T2H2A5	4036407759	no	1368.39	1	
CA	J6W596	5146925828	no	121.82	1	
CA	H8R 3X1	514-364-1935	yes	290.97	1	
CA	L5N0C5	4162582732	yes	0.00	0	
CA	h1y 2r9		yes	0.00	0	
CA	K0L 1Y0	7056961897	yes	0.00	0	
CA	H2Y3T3	514-288-1890	yes	0.00	0	
CA	J7K4E6	4504173383	yes	0.00	0	
Country Coc	Zip	Phone	Accepts Ma	Total Spent	Total Orders	Tags
-Dialer Setting-	-Dialer Setting-	Pre dialing phone field	-Dialer Setting-	-Dialer Setting-	-Dialer Setting-	-Dialer
		Dialer Setting-				
		Pre dialing phone field				
		Dialer Priority				
		Dialer Schedule				

- Reset Agent
- deduplicated customers will get un-assigned
- Import to diallist when deduplicated
- Ignore deduplicated: don't import if deduplicated found
- All: import to dial list any way
- Ignore success: don't import if deduplicated found and customer status is success

10.3 Shell Job

On the left menu, please go to [Call Center] -> [Shell Job] to open the page.



ID	Target	Filename	Status	Total	Success	Error	Duplicate	Success Rate	Executed At	Creby	Success Data	Error Data	Duplicated Data	Original Data
122	Organization CustomerTable	Microsoft Excel 工作表.csv	Closed	3	3	0	0	100%	2016-03-11 17:55:00	sara	Download			Download
121	Organization CustomerTable	Microsoft Excel 工作表.csv	Closed	14	0	14	0	0%	2016-03-11 16:54:00	sara	Download			Download
120	Gms	GMS.csv	Closed	2	2	0	0	100%	2016-03-09	admin	Download			Download

Module Function: In this page, you can check the all the import jobs.

ID: After doing import, the system will generate a job ID, please use this ID to find the corresponding importing job.

Target: Which table will this job import to.

Filename: The imported filename, to check is the file the right one.

Status: The status of the import job.

Total: The total import data.

Why it shows 100 data while my file only has 80 data?

There have 20 blank data at the end of your file, please open the excel file to delete the blank data.

Success: How much data is imported successfully.

Error: How much data is failed to import.

Success Rate: The success rate;

Executed At: At what time to execute the import.

I set the executed time as 10:51, it is 11:00 now, but it is still not executed, why?

Please check the date and your server time. Please contact your administrator to check is the import job active?

Creby: The import job is created by whom.

Success Data: The success imported data.

Error Data: The fail imported data.

Duplicated Data: The duplicated data. 下载重复的数据

Original Data: The original data.

Delete: Delete imported record.



If the job is importing, it can not be deleted.

10.4 Shell Export

On the left menu, please go to [Call Center] -> [Shell Export] to open the page.

Export Jobs Refresh Now

File Name	Page	Status	Data Number	Export SQL	Executed At	Creby	Cancel	Download	Delete
customerpackages_20160412-143610.xls	Customer Packages	Closed	0	View SQL	2016-04-12 14:36:00	admin		Download	Delete
customerpackages_20160412-142917.xls	Customer Packages	Closed	3	View SQL	2016-04-12 14:26:00	admin		Download	Delete
exportteam2_20160401-142112.tar.gz	Teams	Closed	0	View SQL	2016-04-01 14:21:12	admin		Download	Delete
exportteam72_20160401-142029.tar.gz	Teams	Closed	0	View SQL	2016-04-01 14:20:29	admin		Download	Delete
exportteam76_20160401-134735.tar.gz	Teams	Closed	0	View SQL	2016-04-01 13:47:35	admin		Download	Delete
exportteam75_20160330-171203.tar.gz	Teams	Closed	0	View SQL	2016-03-30 17:12:03	admin		Download	Delete
exportteam2_20160330-101909.tar.gz	Teams	Closed	0	View SQL	2016-03-30 10:19:09	admin		Download	Delete
agentrepresents_20160316-100317.xls	Agent Details	Closed	0	View SQL	2016-03-16 10:03:17	admin		Download	Delete
exportteam2_20160115-162621.tar.gz	Teams	Closed	0	View SQL	2016-01-15 16:26:21	admin		Download	Delete
exportteam2_20160115-162558.tar.gz	Teams	Closed	0	View SQL	2016-01-15 16:25:58	admin		Download	Delete

RecordingFile Export Refresh Now

DirectoryName	Page	Status	Data Number	Export SQL	Executed At	Creby	Download	Delete
pbxcdr_20140926142517_admin	cc10_today_pbxcdrs	Closed	35	View SQL	2014-09-26 14:25:00	admin	Download	Delete

Module Function: In this page, you can check the all the export jobs and export recording files.

Export Jobs

The export file is under system /var/www/html/asterCC/data/shellexport/.

File Name: The exported file name

Page: In which page to execute the export.

Status: The status of the export job.

Data Number:How much data has been exported.

Export SQL: To check the export structured query language

Executed At: At what time to execute the export.

Creby: The export job is created by whom.

Cancel: Cancel the importing job.

Download: Download the exported job.

Delete: Delete the exported jobs and files

Recording File Export

Directory Name: The directory for saving the exported recording.

Page: In which page to execute the recording export.

Status: The status of the export job.

Data Number:How much data has been exported.

Export SQL To check the export structured query language

Executed At: At what time to execute the export.

Creby: The export job is created by whom.

Download: Download the exported job.

Delete: Delete the exported jobs and files



If the executed time has passed but job not carry out, please check if the server time the same as your local time.

10.5 Link Urls

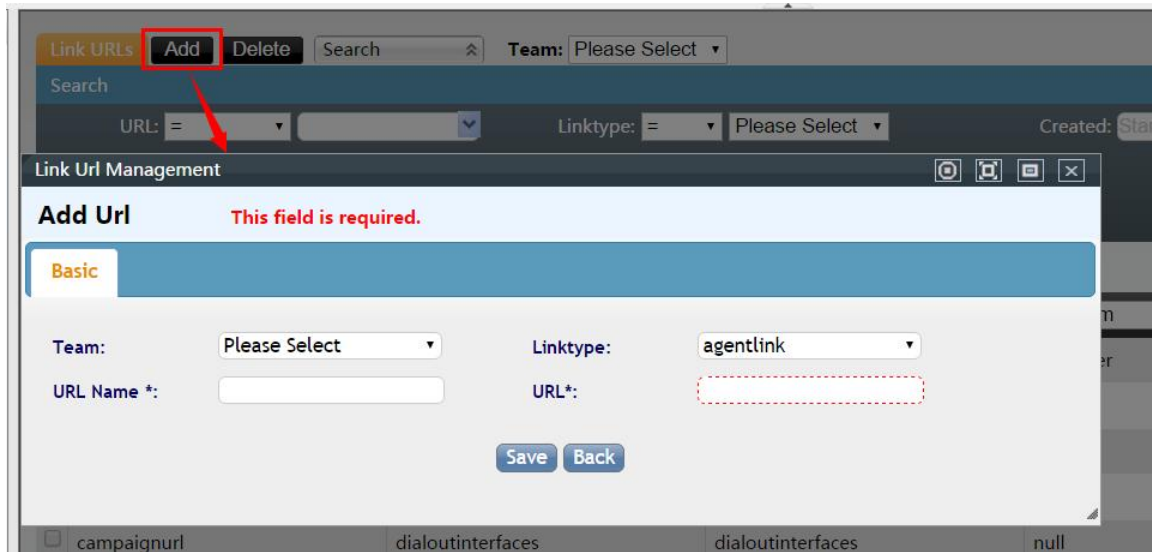
On the left menu, please go to[**Call Center**]-> [**Link Urls**] to open the page.

Linktype	URL Name	URL	Team	Delete
agentlink	长隆销售系统	http://www.baidu.com	UCServer	Delete
agentlink	dialininterfaces	dialininterfaces	null	Delete
eventurl	writeeventlogs	http://127.0.0.1/writeeventlogs	null	Delete
groupworklink	groupworkpages	groupworkpages	null	Delete
campaignurl	dialoutinterfaces	dialoutinterfaces	null	Delete
agentlink	vdialin	custompages	null	Delete

Module Function: To set a link URI for system application module.This module is very useful as the URL can be used repeatedly.

Add

Click **【Add】** to open the page.



Team: To which team this link url belongs to.

Linktype:

Agentlink, the virtual office agent platform link url(the working platform of virtual office agent);

Superviselink, the virtual office agent's supervising link;

Groupworklink, choose this link when setting agent group, it is for customizing working platform for agents in this group.

Campaignurl, the campaign working platform url.

ivreventlink, the ivr event link.

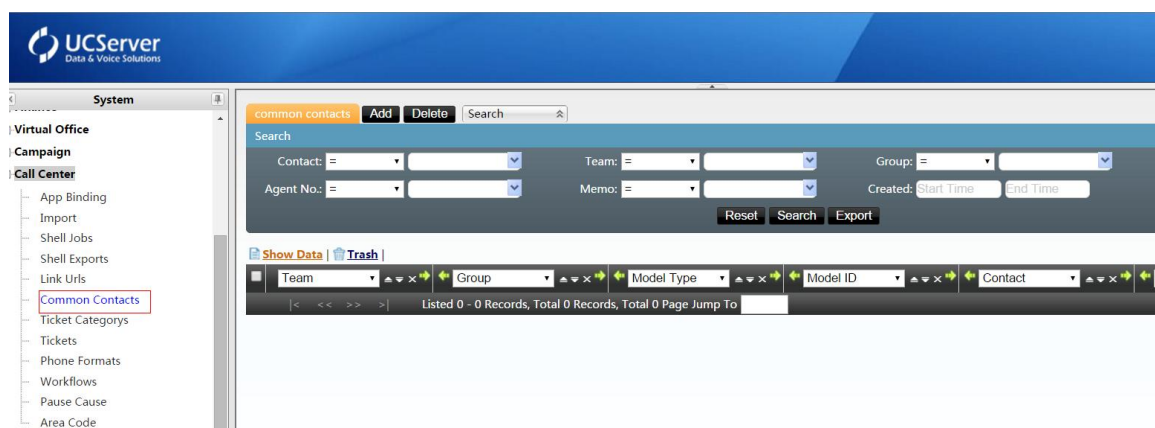
Eventlink, the system calling event sending link, to record the calling.

URL Name: Name this URL,

URL: Input the url, like http://www.uscserver.cc

10.6 Common Contacts

On the left menu, please go to **【Call Center】**→ **【Common Contacts】** to open the page.



Module Function: Is like a phone book, which record common phone numbers and set a link URI for system application module. This module is very useful as the URL can be used repeatedly. (It will show up when agent click Consult and when doing transfer in virtual office)



- Login as the administrator, you will see all device rates under the team and the default device rate.
- The default rate is read only to the team.

Add

Click **Add** to add common contact.

The screenshot shows the 'Common Contact Management' window with the 'Add Common Contact' tab selected. The form contains the following fields:

- Team*:** Dropdown menu with 'UCServer' selected.
- Group:** Dropdown menu with 'Please Select' selected.
- Model Type*:** Dropdown menu with 'All' selected.
- Model ID:** Dropdown menu with 'Please Select' selected.
- Contact*:** Text input field.
- Phone*:** Text input field.
- Show Phone*:** Dropdown menu with 'Yes' selected.
- Memo:** Text input field.
- Status:** Dropdown menu with 'Custom options not s' selected.

At the bottom of the form are 'Save' and 'Back' buttons.

Team: To which team this common contact belongs to.

Group: To which team this common contact belongs to.

Model Type: Select a model type, All, Campaign, Virtual Customer, Business Apps.

Model ID: Select a model ID.

Contact: The contact name;

Phone: The contact phone number, for consulting and transferring;

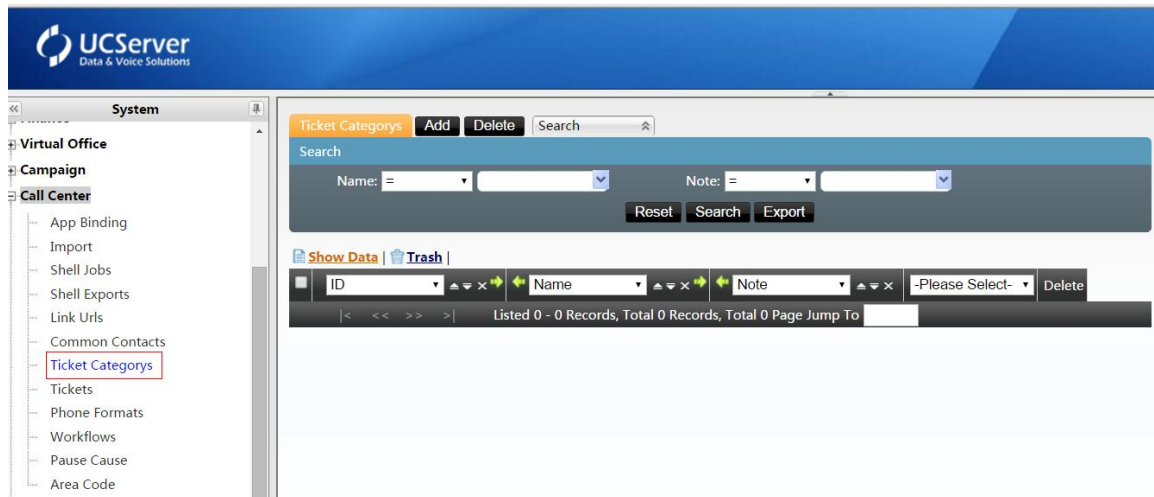
Show Phone: Whether to show the phone number to agent or not;

Memo: Give a description to this contact

Status: To inform virtual office agent when to contact this contactor;

10.7 Ticket Category

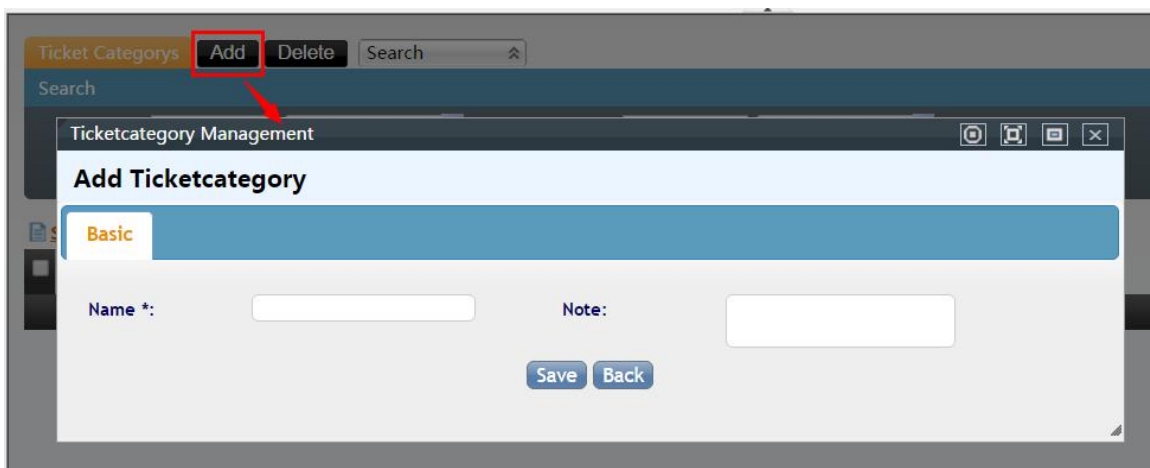
On the left menu, please go to **[Call Center]** -> **[Ticket Category]** to open the page.



Module Function: To classify the tasks, for better task management;

Add

Click **【Add】** to open the page.



Name: Name this category;

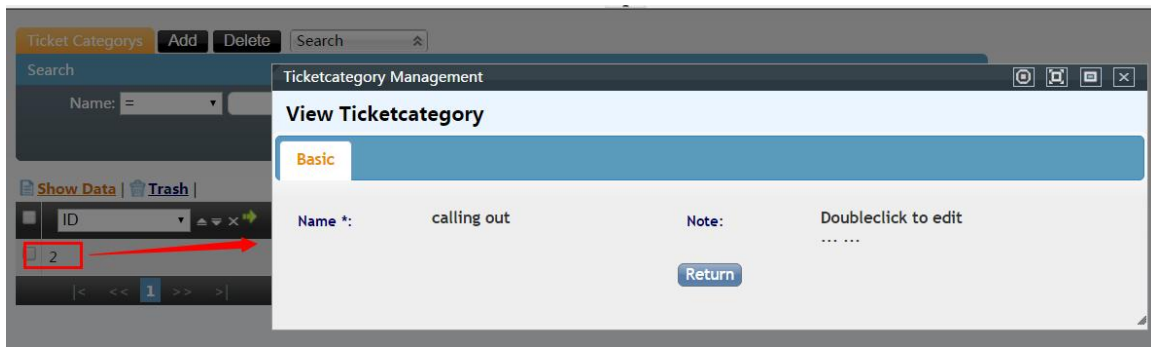
Note: Give a note to this category;

Click **【Save】** when finishing the page, then it will show the newly added data on the page

ID	Name	Note	-Please Select-	Delete
2	calling out			Delete

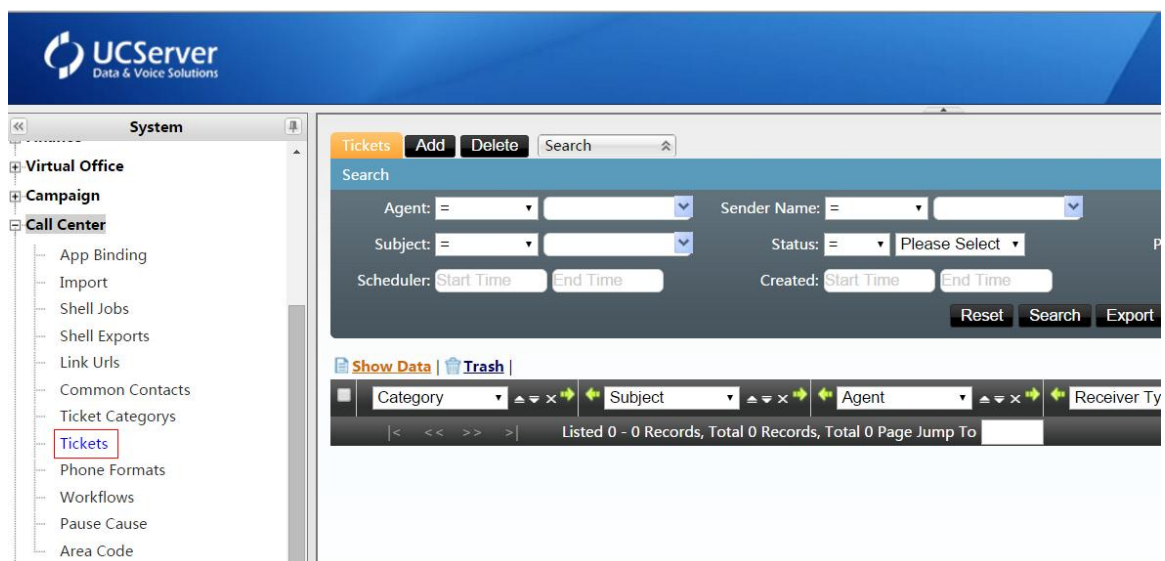
Edit

You can double click the field to re-open the edit page and edit them. Double click the field before editing.



10.8 Tickets

On the left menu, please go to **[Call Center]** -> **[Ticket]** to open the page.



Module function: To release and manage tasks.

Add

Click **【Add】** to open the page.

The screenshot shows a web application window titled 'Ticket Management' with a sub-header 'addTicket'. The 'Basic' tab is selected. The form contains the following fields:

- Subject:** A text input field.
- Category:** A dropdown menu with 'calling out' selected.
- Team:** A dropdown menu with 'UCServer' selected.
- Priority:** A dropdown menu with 'Normal' selected.
- Agent Group:** A dropdown menu with '--Please Select Agent' selected.
- Scheduler:** A text input field.
- Agent:** A dropdown menu with '--Please Select Accol' selected.
- Files:** An 'Upload' button.
- Desc.:** A rich text editor with various formatting icons.

At the bottom of the form are 'Save' and 'Back' buttons.

Subject: Name this task;

Category: To select a category;

Team: To which team this task assign to;

Priority: The priority of this category (Normal, Important, urgent, very urgent);

Agent Group: To which group to complete the task; If no agent group selected, the Agent field can be extension or no agent. If agent group selected, the Agent field can be agent or no agent.

Agent: Which agent to complete the task. If no agent selected, then the whole agent group will complete the task.

Scheduler: When to carry out this task;

Upload: To upload attachment;

Desc: To give a description to this task;

Click **【Save】** when finishing the page, then it will show the newly added data on the page

Show Data Trash	Category	Subject	Agent	Receiver Type	Status	Priority
	calling out	ucserver	2864	Account	accepted	Normal

Edit


You can double click the field to re-open the edit page and edit them.

Edit Ticket

Ticket Management

Subject: subject	Status: accepted	Created: 2016-04-13 17:43:19
Category: 1	Agent: 3330(Account)	Sender Name: admin(Account)
Priority: Normal		
Scheduler: 2016-04-13 17:43:00		

Ticket Description



aaa

Edit Ticket

Ticket Management

Subject: subject	Status: accepted	Created: 2016-04-13 17:43:19
Category: 1	Agent: 3330(Account)	Sender Name: admin(Account)
Priority: Normal		
Scheduler: 2016-04-13 17:43:00		

Ticket Description


aaa

There are five parts in this page

a. Ticket Management

Edit Ticket

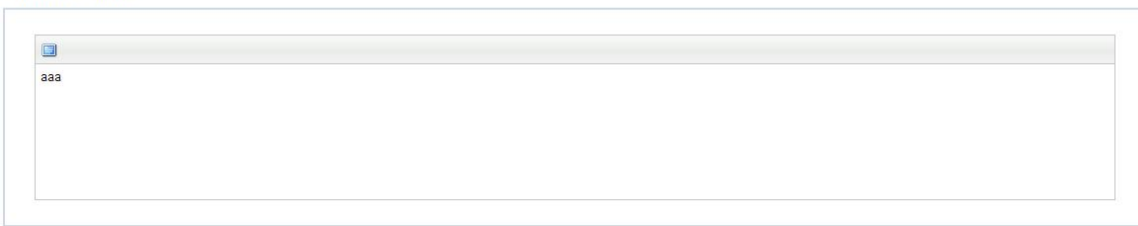
Ticket Management

Subject: subject	Status: accepted	Created: 2016-04-13 17:43:19
Category: 1	Agent: 3330(Account)	Sender Name: admin(Account)
Priority: Normal		
Scheduler: 2016-04-13 17:43:00		

The gray field is not editable while the black field is editable. These are basic info of this ticket.

b. Ticket Description

Ticket Description




The description of this ticket;

c.File

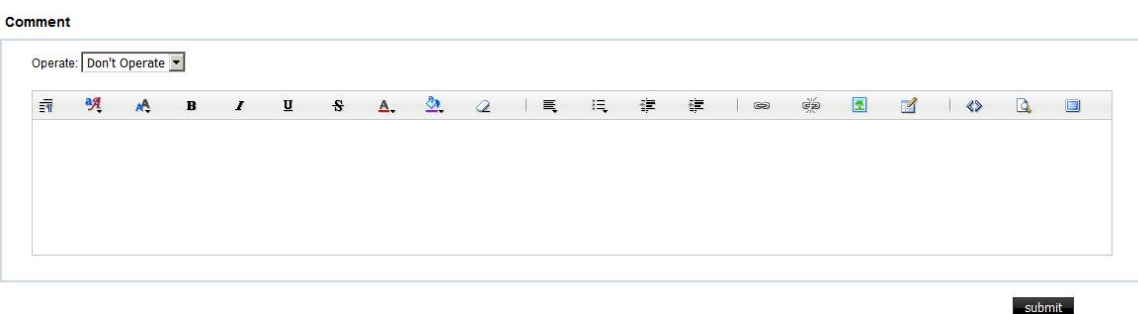


d.Ticket List



The ticket modified history;

e.Comment



Give comment and feedback to this ticket;

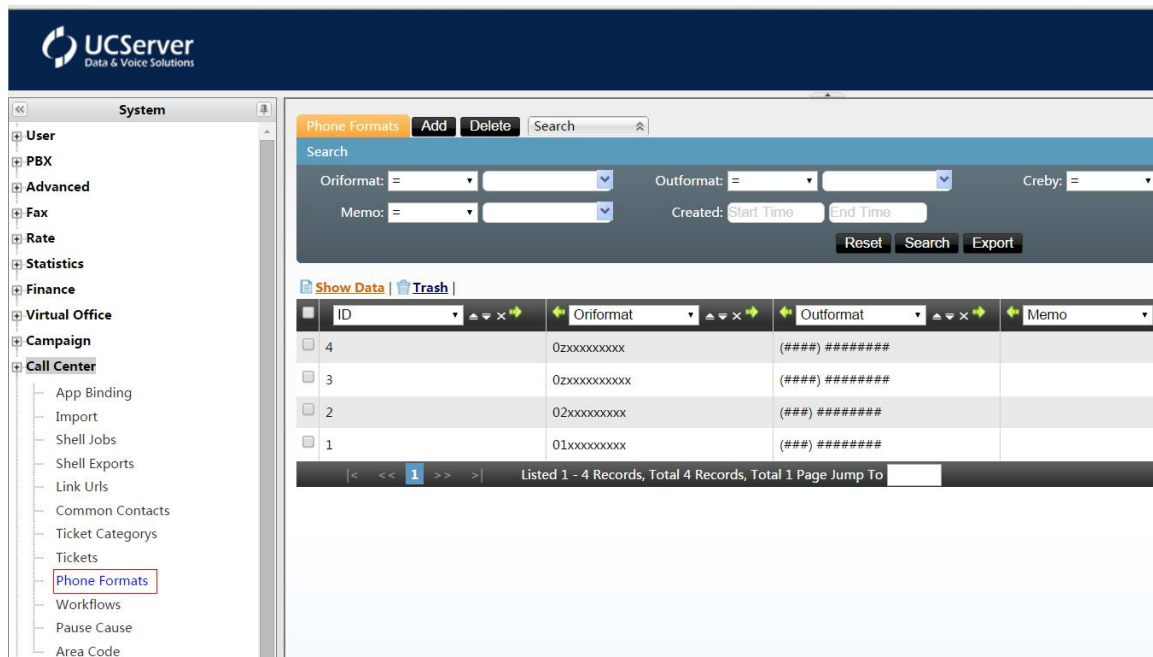
Operate: You can shift and receive the ticket.Also can give operation to the ticket status(completed,return, cancel)

Text: To reply on this ticket;

*The ticket list will show every ticket modification.At the same time, the system will send hint to the other side of ticket.

10.9 Phone Formats

On the left menu, please go to[**Call Center**]-> [**Phone Formats**] to open the page.

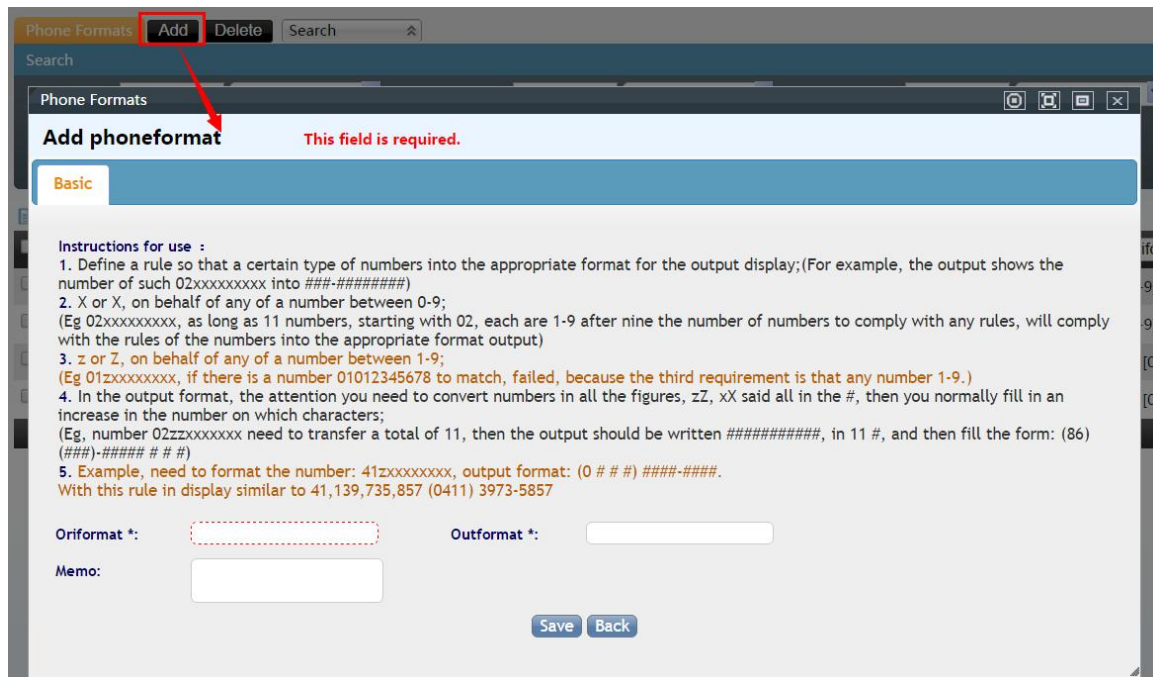


Module Function: To set the phone numbers' format;

As the customer contact data are from different resource. Some are importing, some are added by agents. In order to make these data's format the same, when importing or adding new data, the system will filter all special characters and then save them as numbers. It is not convenient to show numbers only, so it needs this module to keep the format the same.

Add

Click **【Add】** to open the page.



Instructions for use :

1. Define a rule so that a certain type of numbers into the appropriate format for the output

display;(For example, the output shows the number of such 02xxxxxxxx into ###-#####)

2.X or X, on behalf of any of a number between 0-9;

(Eg 02xxxxxxxx, as long as 11 numbers, starting with 02, each are 1-9 after nine the number of numbers to comply with any rules, will comply with the rules of the numbers into the appropriate format output)

3.z or Z, on behalf of any of a number between 1-9;

(Eg 01xxxxxxxx, if there is a number 01012345678 to match, failed, because the third requirement is that any number 1-9.)

4.In the output format, the attention you need to convert numbers in all the figures, zZ, xX said all in the #, then you normally fill in an increase in the number on which characters;

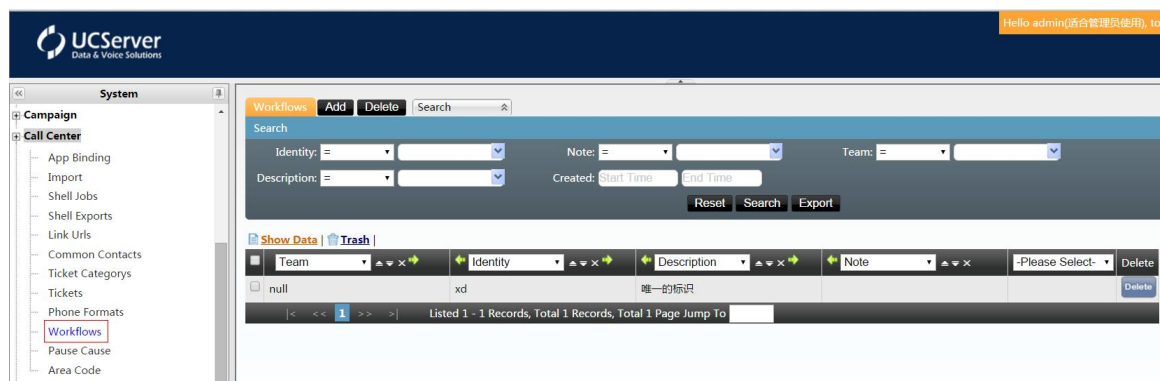
(Eg, number 02zzxxxxxxxx need to transfer a total of 11, then the output should be written #####, in 11 #, and then fill the form: (86) (###)-##### # # #)

5.Example, need to format the number: 41xxxxxxxx, output format: (0 # # #) #####-#####.

With this rule in display similar to 41,139,735,857 (0411) 3973-5857

10.10 Workflows

On the left menu, please go to[**Call Center**]-> [**Workflows**] to open the page.



Add

The screenshot shows the 'Workflow Management' interface. At the top, there is a navigation bar with 'Workflows', 'Add', 'Delete', and a search icon. Below this is a search section with filters for Identity, Note, Team, Description, and Created (Start Time, End Time). The main content area is titled 'Add Workflow' and has a 'Basic' tab selected. The form contains the following fields:

- Team: Please Select (dropdown)
- Identity *: (text input)
- Description *: (text input)
- Note: (text input)

At the bottom of the form are 'Save' and 'Back' buttons. A red arrow points to the 'Add' button in the top navigation bar.

Team: to which team this workflow belongs to;

Identity: The unique identity of this workflow;

Description: Give a description on this workflow's function;

Note: Give a note to this workflow;

Click **[Save]** when finishing the page, then it will show the newly added data on the page

Edit

You can double click the field to re-open the edit page and edit them. Double click the field before editing. Only the field in black is editable.

The screenshot shows the 'Workflow Management' interface with the 'Edit Workflow' form open. The form has a 'Basic' tab selected. The fields are pre-filled with the following values:

- Team: (dropdown menu)
- Identity *: xd
- Description *: 唯一的标识
- Note: Doubleclick to edit

At the bottom of the form are 'Add Work Node' and 'Return' buttons. In the background, a table with columns 'Team' and 'Identity' is visible. A red arrow points to the 'Team' field in the table, which contains the value 'null'.

Add Work Node

The screenshot displays two overlapping windows from the EQUINET VINA-PBX system. The top window, titled 'Workflow Management', has a tab labeled 'Basic' and contains fields for 'Team: eason', 'Identity *: eason', 'Description *: ad', and 'Note: Doubleclick to edit'. Below these fields are two buttons: 'Add Work Node' (highlighted with a red rectangle) and 'Return'. The bottom window, titled 'Work Node Management', also has a 'Basic' tab and is titled 'Add Work Node'. It contains several fields: 'Workflow: eason', 'Type: New' (dropdown), 'Desc. *: ' (text input), 'Objecttype: Account Group' (dropdown), 'Note: ' (text input), 'Parent Node: Please Select' (dropdown), 'Verify Type: All' (dropdown), and 'Team: eason' (dropdown). Below these fields are checkboxes for 'Verify', 'Attachment', 'Note', 'Invite', and 'eason-ce'. There are also 'Add' and 'Remove' buttons with arrows. At the bottom of this window are 'Save' and 'Return' buttons. A red arrow points from the 'Add Work Node' button in the top window to the 'Add Work Node' window.

Workflow: The team which need to add the workflow;

Parent Node: Select a parent node to add a children node;

Type: The type of this node, New, Notice and verify. Notice means if reach current node, it will only send out notice while verify means the verification needs.

Verify Type: Including All and Part; If select all, then the node will be effective only when all are verified. If select part, only a part of members verify it will pass.

Desc*: Give a description to this node;

Team: To which team this node belongs to, same as workflow;

Object Type: Who will do the verify and notice.

Note: Give a note to this node;

10.11 Pause Cause

On the left menu, please go to [Call Center] -> [Pause Cause] to open the page.

UCServer
Data & Voice Solutions

System

- Campaign
 - Call Center
 - App Binding
 - Import
 - Shell Jobs
 - Shell Exports
 - Link Urls
 - Common Contacts
 - Ticket Categories
 - Tickets
 - Phone Formats
 - Workflows
 - Pause Cause**
 - Area Code
- Survey
- Message
- Log
- Realtime

Pause Cause Search

Reason: = Team: = Memo: =

Status: = Please Select Group Admin Approve: = Please Select Created: Start Time End Time

Reset Search Export

Show Data | Trash

Reason	Memo	Status	Group Admin App
<input type="checkbox"/> training	培训	Enable	No
<input type="checkbox"/> meeting	会议	Enable	No
<input type="checkbox"/> leave	请假	Enable	Yes
<input type="checkbox"/> lunch	午休	Enable	No
<input type="checkbox"/> rest	小休	Enable	No
<input type="checkbox"/> other	其它	Enable	No

Listed 1 - 6 Records, Total 6 Records, Total 1 Page Jump To

When the agent is pausing or paused by groupadmin, it should fill in the reason of pause. At the same time, the pause time should be counted in Statistics Module. The system don't permit adding、updating or deleting.

Edit

Pause Cause

Edit Reason

Basic

Reason: meeting Team: Please Select

Status: Enable Group Admin Approval: No

Memo: 会议

Return

Reason: The reason of pausing.

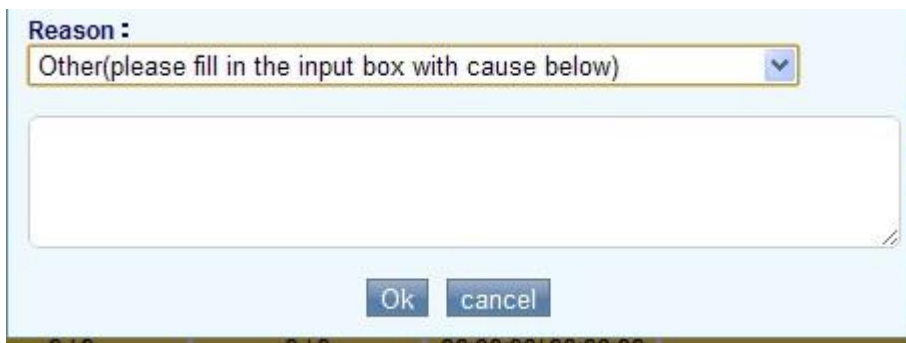
Team: It belongs to all system while a team default, so it can be used no matter agent or groupadmin.

Status: Eable or Disable this reason of pause.

Group Admin Approval: If "yes", the agent need to enter the group password to verify the administrator's account when he need pause, only pass the verification, the agent can be paused.

Memo: Explain the reason of pause.

The textarea rectangle will appear, when agent's pause reason choosed to be "Other".

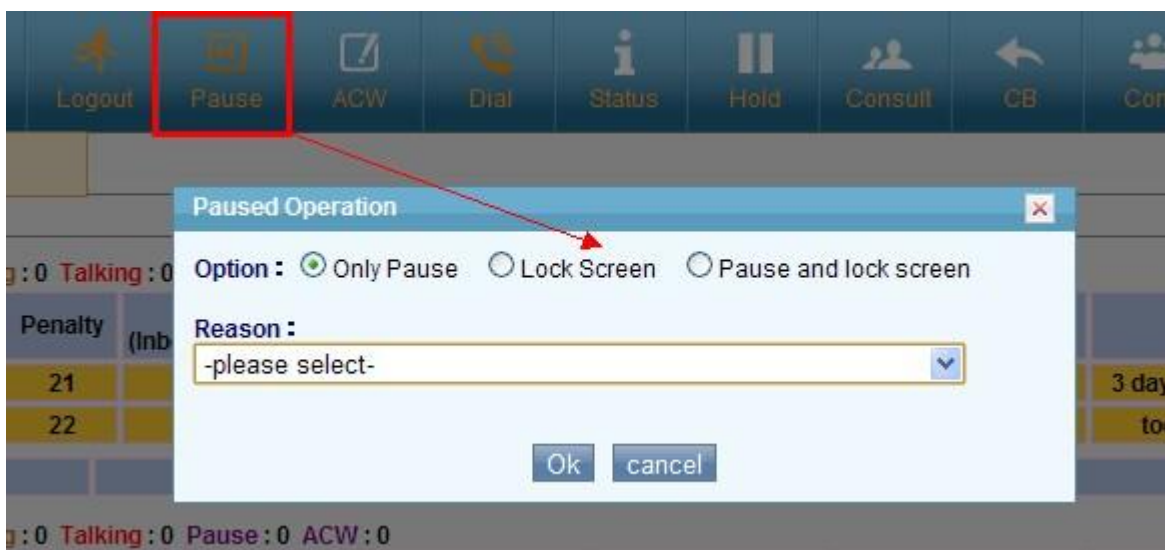


Reason :

Other(please fill in the input box with cause below)

Ok cancel

The Agents' working Page



Logout Pause ACW Dial Status Hold Consult CB

Paused Operation

Option : ☒ Only Pause ☐ Lock Screen ☐ Pause and lock screen

Reason : -please select-

Ok cancel

g : 0 Talking : 0 Pause : 0 ACW : 0

If the agent need to pause, he just click the pause button which on the top of working page, then choose "Option" and "Reason", if it need verification of group admin, you can see as follows:



To select this reason, you need to enter the group password to verify the administrator's account

resskillid : Group1

Groupadmin Account :

Groupadmin Password :

back Ok

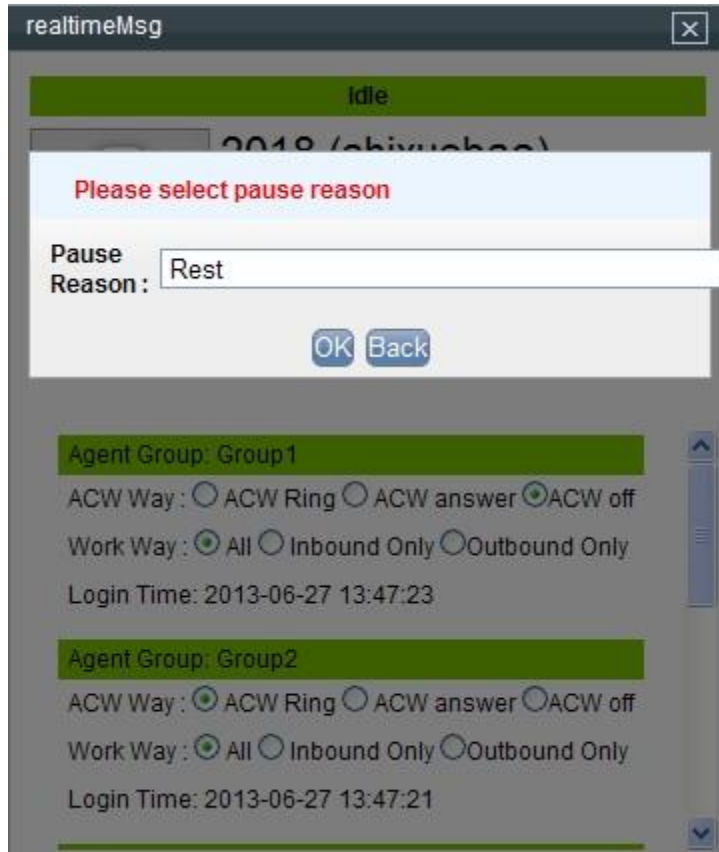
Reason : Leave of absence

Ok cancel

only input the correct account and password, the pause will be executed.

The Live Monitor Page

The group administrator can not only monitor real-time, but also force pause to agents. It also need choose a reason, but needn't input admin's account and password.



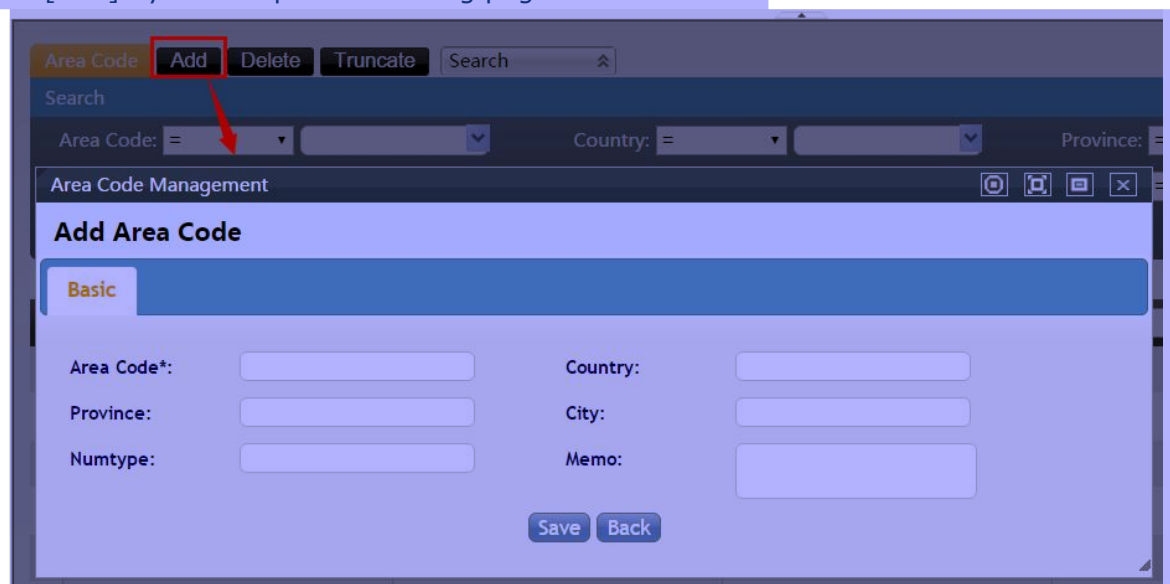
10.12Area Code

Click [Call Center]→[Area Code], you can enter the page of area's code. The area is assigned with leading digits of the telephone number, also we can import the area list via [Call Center]→[Import]



Add

Click [Add], you will open the adding page of area code:



- **Area Code:** The leading digits of the telephone number.
- **Country:** The country of the telephone number.
- **Province:** The province of the telephone number.
- **City:** The city of the telephone number.
- **Numtype:** The type of telephone number, include: Fixed, China Mobile, China Telecom and China Unicom.
- **Memo:** Give a note to this area;

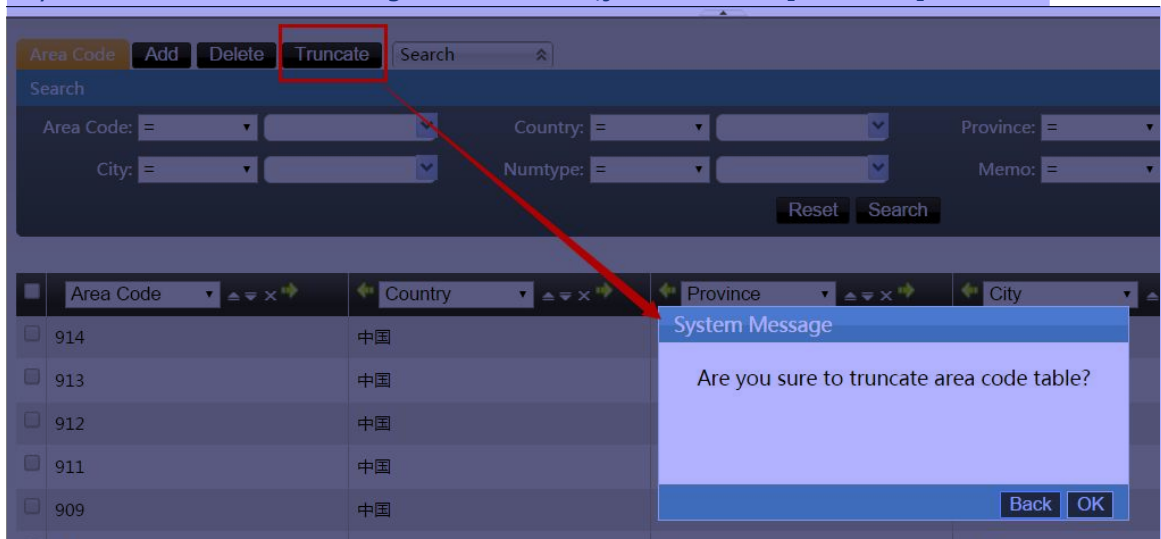
Edit

We also edit the data by Double-click it, as follows:



Truncate

If you want delete all message of area code, just click the [Truncate] button.

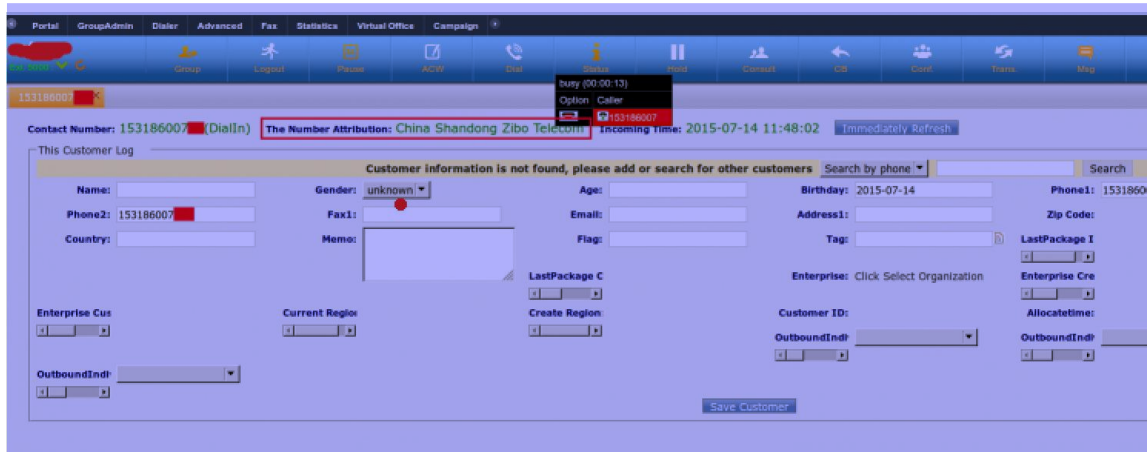


The prompt which execute clear up the table via clicking "OK" empty will pop up after clicked [Truncate] button.

Display on Agent Page

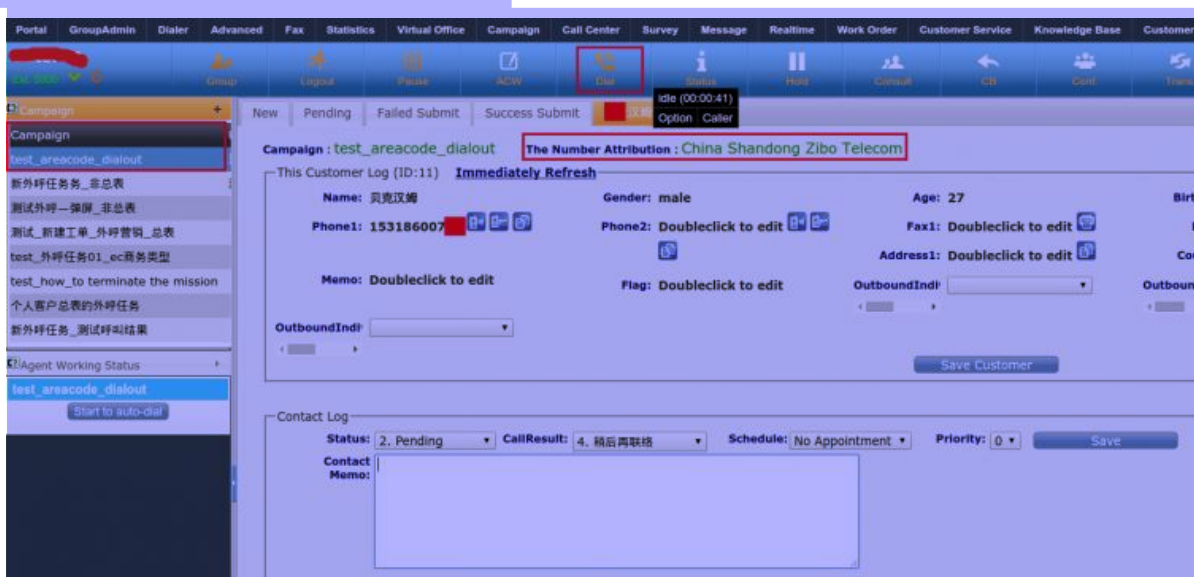
Display on Customer Service

After completed the adding of area code, "The Number Attribution" will appear if the calls dialing into agent, as shown below:



Display on Campaigns

The Number Attribution appears on the top of customers' information when agent dial out by button or device, as shown below:



11 Survey

11.1 Survey

On the left menu, please go to **[Survey]** -> **[Survey]** to open the page.

Add

Click **[Add]** you can add a new survey, as following:

Basic

Team: Set the survey belongs one team, only the module belongs the team can use the survey.

Surveytype: It consists of commontype and voicetype.

Status: The default status is "Idle", it will turn to be "Assigned" when the survey is binded to "Campaign" or "Virtual Office". One survey can't be binded to two module one time.

ClosedQuota: The default value is "Yes", means that don't norm the number of survey answered.

Name: The identification of the survey.

The combo box behind the "Name*" is used to add survey by copying existed survey or not.

The "New Survey" means you need set question group, option and items. If you choose the existed survey, it will copy the group, option and items to this survey automatically.

Advanced

Welcome word: The prompt given to customer from agents before the beginning of survey.

End word: The prompt when the survey finished.

Quotatext: The prompt when the number of survey answered reach the "Quota".

Survey Memo: Describe the purpose of the survey or other details.

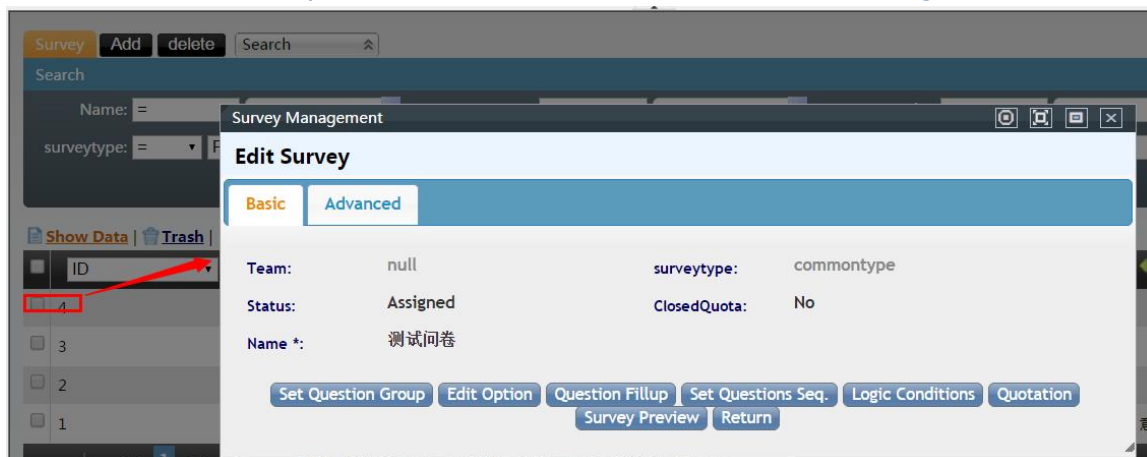


The welcome and end word use text when surveytype is commontype, it use announcements in Advanced module when surveytype is voicetype.

After finishing the survey, please click [Save] button.

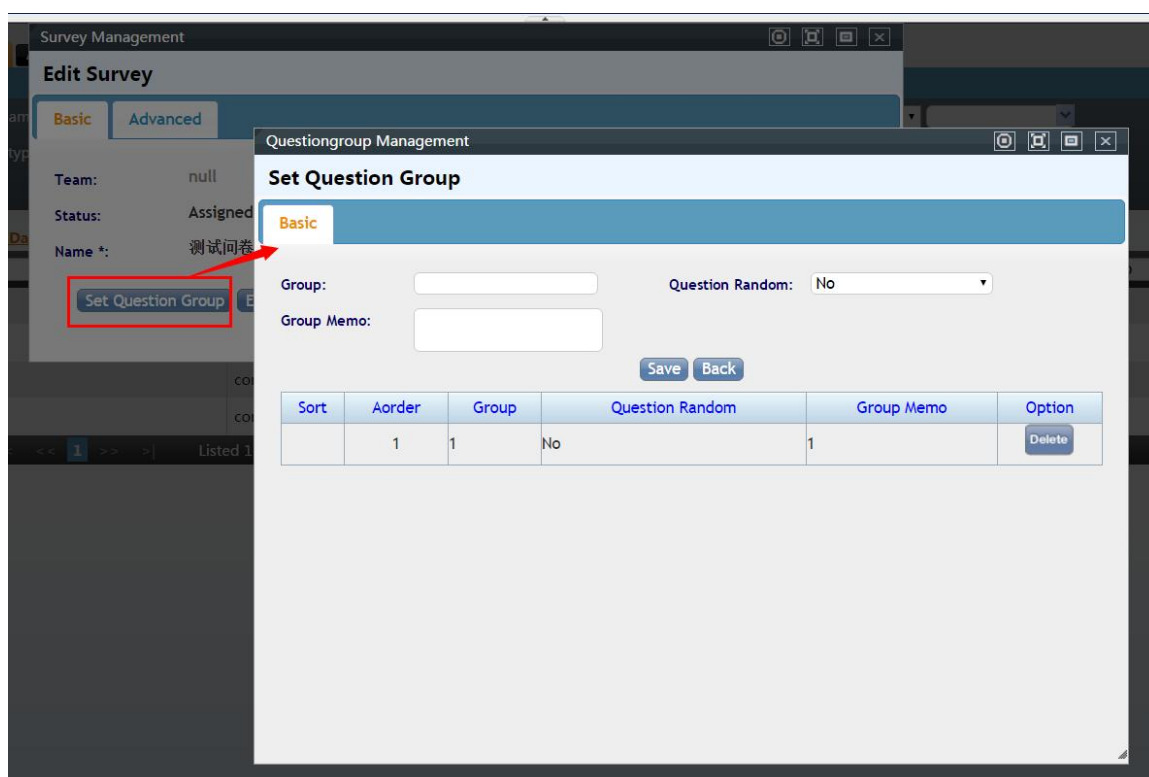
Edit

Double-click the survey has been added, we can edit it, as following:



Set Question Group

Click [Set Question Group] button, you can open the page:



Group: To distinguish the question group different from others.

Question Random: Whether the question random when customers answer it.

Group Memo: Description of the question group and other details that the agent can get.

After saved, it will be appeared below , you can sort it by "Aorder", the more prior the "Aorder" more small in this group.

Edit Option

Survey Management

Edit Survey

Basic Advanced

Team: null surveytype: commontype

Status: Assigned ClosedQuota: No

Name *: 测试问卷

Set Question Group **Edit Option** Question Fillup Set Questions Seq. Logic Conditions Quotation

Survey Options Management

Add Survey Option

Basic

Name: 测试问卷 Group: 1

Question: Question Qtype: Single choice

Qloop: No Mandatory: Yes

Reference: No

Sound File: Qmemo:

OK Back

Group	Survey Option	Option Memo	Option Type	Qloop	Sqloop	Mandatory	Item Num.	maxitem	minitem	Reference	Reference Table	Reference Edit	Ref
1	是否有呼叫中心需求	Doubleclick to edit	Radio	No	No	No	2	0	0	No			

Group: The survey options belong to this question group.

Question: Fill in the blank with question.(For example: How long have you concerned in our company?)

Qtype: The type of questions, it include "Single Choice(Only one choice can be choosed)", "Multiple Choice(You can choose several items, and you can set maxitem and minitem)", "Text(You can input many words or sentences)", "Combined(A big topic include deals of small questions)".

Qloop: Whether change the order of items or not.

Mandatory: Whether must answer this question or not. When it is "Yes", customer can't answer the next question if he is unfinished current one.

Reference: If there is a question can be answered using customers' information, whether associate automatically with it.

Reference Edit: Whether the agent can modify the reference contents which associated with customers' information.

Reference Table: Which module's table can be refered, it decided by survey's module.

Reference Field: You should choose the value of field you need in the table, to fill the answers about questions.

For example: What's brand of your car ? A.Bentley B.BMW C.Benz D.Mustang

Now, if there is a field named "The brand owned cars currently"="Bentley" in customer detail.

This question will be answered automatically when the customer come across it.

Additionally, the system can make a choice based on the information of customer. The answers can be edited by agent if "Reference Edit" is "yes".

Qmemo: Question memo. To guide customers to answer surveys, call attention to what's the situation, warning or informed answer to the question. Survey option will appear below after you finished and clicked the [OK] button.

The order of question in accordance with the following norms:

First, Order by "Group" Second, order by the creating turns of "Survey Option"

Add Item

On the Survey Option adding page, there is a [Add] button behind every question which have saved. Click the button, you can open item adding page.

First, let me introduce the "Item adding" pages of Single and Multiple choice.

Add Survey Option

SurveyoptionsItem Management

Add Item

Basic

Name: 是否有呼叫中心需求 Qtype: Radio

Answer: Option ExportShow:

Enable export display: No Atext: ☐

Quick Reference: Amemo:

Sort	Aorder	Item Name	Export display	Enable export display	Atext	Item Memo	Option
1	有	DoubleClick to edit	No	No	DoubleClick to edit	Delete	
2	无	DoubleClick to edit	No	No	DoubleClick to edit	Delete	

Answer: The content of item. (For example: A.Yes, B.No or A.\$5, B.\$4, C.\$3, D.\$2)

Option ExportShow: It take place of survey content when it exported. It makes statistics more easily.

Enable export display: Whether display the content which were replaced.

Atext: Add the text area behind items. (For example: Other(...))

Quick Reference: You can add quickly the options been used once, no matter the items in this survey or from template.

We usually put the frequent items into a template. For example, the gender template: female, male and secret.



Read more about answer templates. refer to: [Answer Templates](#)

Amemo: Additional memo to explain the warning attention.

It will be save below after you click the [OK] button.

Second, let me open the page of combination options and items. It applies to several question which can answered by same items.

As shown in image above, the row is option, the column is question. We can choose option type of Combination.

It includes Radio(Single choice) and Checkbox(Multiple choice). At the same time, you can set up "whether to add the input box" to every item behind question.

You can order items and option directly by clicking the direction arrow.

Set Questions Seq.

After finished the option and question, we should sort the questions.

Click [Set Questions Seq.], you can see "System Message" of which question group should be sort, as following:

Click [OK] after selected the question group, you can sort the questions belong to this question group by pressing the question and move up and down. Click [View] you can preview items about this question, as following:

Set Questions Seq. - Google Chrome

192.168.1.175/surveys/SetOptionNo?sid=6&gid=11

1. View Q1

2. View Q2

	Yes	No	Secret
Are you Male ?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you like film?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you have experience of study abroad?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. View Q6 What's the channels did you through to know the [FILL] brand car ?

4. View Q5 What's the brand of car do you like?

- ☐ A.Bentley
- ☐ B.BMW
- ☐ C.Benz
- ☐ D.Mustang

5. View Q3

6. View Q4

Save Option No. Close

At last, click [Save Option NO.] to save the order of question.

Question Fillup

When the question need the answered option to fill up, we should use the "[FILL]" element. For example: Q6.What's the channels did you through to know the "_. _ . _ . _ ." brand car ?

(Please quote the result of Q5)

First, the admin can edit the question as following: What's the channels did you through to know the [FILL] brand car?

Then, open the fill question setup page:

fill question setup

Step one,select which question to fillup?

Q6 What's the channels did you through to know the [FILL] brand car ?

Step two,select use which answer to fillup?

Q5 What's the brand of car do you like?

Save Close

question to fillup	use which answer to fillup	Option
Q6 What's the channe...	Q5 What's the brand ...	Delete

You should confirm the question which need to be filled up, and choose which question's answer to fill the question.

If we choose "Bentley" in Q5, then the Q6 turn to: What's the channels did you through to know the "Bentley" brand car? .

Logic Conditions

It used to logic transfer "Jump question、Hidden question、Hidden answer and And question" after answer the question. Astercc allows serveral questions from different question group combined to do logical process.

Design the questionnaire logic, the administrator need to have ability to analysis(analysis customers' questionnaire request) and to thinking logically(use of logic conditions, to meet the demand of customer).

Question	Conditions	Answer	Action	Target question	Target option	Related	Option
Q5 What's the brand of car do you l...	Meq	A.Bentley	Jumpq	Q6 What's the channels did you thro...			Delete
Q5 What's the brand of car do you l...	Meq	B.BMW	Jumpq	Q6 What's the channels did you thro...			Delete
Q5 What's the brand of car do you l...	Meq	C.Benz	Jumpq	Q6 What's the channels did you thro...			Delete
Q5 What's the brand of car do you l...	Meq	D.Mustang	Jumpq	Q6 What's the channels did you thro...			Delete

As shown in image above, first confirm which question need execute logic setting. Second, you may choose the logic conditions, include Meq(equal)、Mlike and Unlike. Then, we need select function action, include "Jump question、Hidden question and Hidden answer".

Last, select logical destination, eg: jump to some question, hidden some options and so on. The logic diagram above is equal to:

Question	Conditions	Answer	Action	Target question	Target option	Related	Option
Q5 What's the brand of car do you l...	Mlike	A.Bentley B.BMW C.Benz D.Mustang	Jumpq	Q6 What's the channels did you thro...			

If you want choose several option to execute in logic conditions, you can press the "Ctrl" key and click the conditions same time.

You can test the logic condition is correct or not.

Survey Preview

The image shows a survey preview window titled "test_survey". Inside, there is a light blue box with the text "Welcome word" and "Welcome to our survey ! !". Below this text is a button labeled "Survey Start".

Survey Preview is used to simulate the process of answering, so administrators should check followings:

Check the questions and options of survey;

Check the orders of question and question group;

Check the logic of questions;

Quotation

Only when the "ClosedQuota" is "No", the "Quota" button will be appeared.

The image shows the "Edit Survey" interface in the "Survey Management" system. The "Basic" tab is selected. The "Quotation" button is highlighted with a red box. Below the "Edit Survey" window, the "Surveyquota Management" window is open, showing the "Basic" tab. The "Quotation" field is set to "0". The "Overflow number" is set to "0". The "Limited question" is set to "--No Settings--". The "Limited answer" is set to "--No Settings--". The "Save" and "Close" buttons are visible. At the bottom, there is a table with columns: No., Type, Name, Survey, Option, Item, Name, use, table, Quota, information, Number, completed, Number, Limited, Process, Num, Res. The table is currently empty, showing "No data."

The quotation is to restrict the counts of survey answered, that is to say, the agent needn't to visit the customer when the count reach to quotation.

Survey Quotation Type

1. Limited by survey, question or answer.
2. Limited by information of customer.

1. Solution for Limited by Survey

Quotation: It is a maximum about survey answered.

Overflow Type: Include Number and Percent; When the survey allows a certain quotas exceeded, the quota number counted by overflow type.

Overflow number: The number beyond the quota allowed.

When Overflow Type is Number, the total of survey = Quotation + Overflow number;

When Overflow Type is Percent, the total of survey = Quotation * (1 + Overflow number / 100);

Limited survey: Controlled the quota by number of survey (The default type of quota).

Limited question: Controlled the quota by number of question.

Limited answer: Controlled the quota by number of item.

Click [Save] to finish the limit of survey, you can see the quota below.

2. Solution for Limited by Information of Customer

When the type of survey quota is "information", there are several fields below, as following:

1. You can tick "According to value of the selected field, all add (how many possibilities, increase how many quota.)", and then, if you only use field and don't select any value, the quota will be created as many as values.

You can add fields by clicking [Add] button to create a new quota.

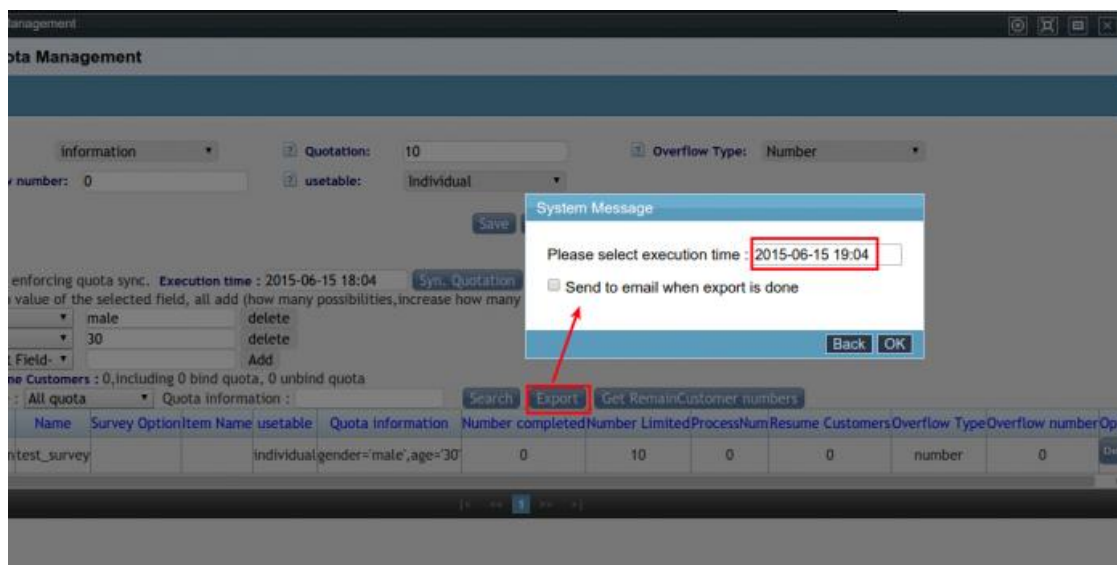
2. You can fill in the value of field manually. For example, "gender is male": it means that you add a quota which the gender is "male".

Syn. Quotation: Only in the type of information, quota will be synchronous into customer information to ensure agents' eligible operation.

Effective Resume Customers、Get RemainCustomer numbers: It is used combined with quota of information, to look over how many survey remaining, and to warn the administrator to upload the new data.

Search: It used to view quota no matter finished or not.

Export: It will export the data into EXCEL according to quota after filled the execution time, as following:



After the expoting task build, system will offer a task number, you can find the task in [Call Center]→[Shell Exports] according to task ID.



How to answer the survey, please refer to: [Agent Work Portal](#)

Statistics of Survey Result

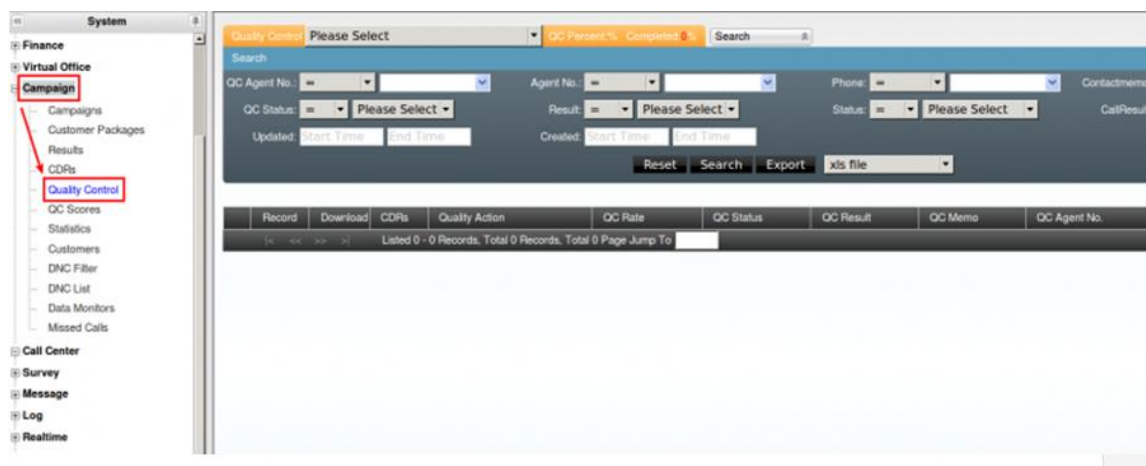


Only the survey result of customer whose status is "Success Submit" or "Failed Submit" can be investigated.

How to

View the Detail Result of Survey

On the left menu, click [Campaign]→[Quality Control] button, you can enter the Quality Control page, as follows:



and then, you should select the campaigns and survey correspondingly, you can view the result of survey after clicking the [search] button, as follows:

The screenshot shows the EQUINET system interface. On the left is a sidebar with navigation options: System, Finance, Virtual Office, Campaign, Call Center, Message, Log, Realtime, and System. The main area displays a search form for 'test_survey_result'. The form includes fields for QC Agent No., Agent No., Phone, Name, Age, Fax1, Email, Address1, Country, Memo, Flag, OutboundIndividual, Contactmemo, QC Status, Result, Status, Gender, and CalResult. Below the form is a table with columns: Record, Download, CDRs, Quality Action, QC Rate, Campaign, Agent No., Agent Name, and Status. The table shows four records, all with a status of 'Failed Submit'. A red arrow points to the 'Search' button.

This screenshot is identical to the one above, showing the EQUINET system interface with the 'test_survey_result' search results. The search form and table are the same, with a red arrow pointing to the 'Search' button.

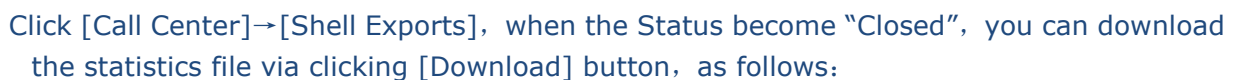
The screenshot shows a table of survey results. The table has columns: Status, dataresult, NoTitle, NoTitle, NoTitle, NoTitle, NoTitle, NoTitle, and NoTitle. The table shows various survey results, including 'Success Submit', 'Failed Submit', and 'Success Submit'.

Status	dataresult	NoTitle	NoTitle	NoTitle	NoTitle	NoTitle	NoTitle	NoTitle
Success Submit	不要紧, 呵呵	BBether	B.2 years	CVirtual Office	astice	ad	astice	
Success Submit	成功	ABest	C.3 years	ACampaign/BCustomer	26	TS	Marvelous, 太好了, 简直不能同一月	
Failed Submit	失败	DBad	C.3 years	CVirtual Office/DStatistic/EPre-Dialer	30	hr	good	
Failed Submit	不要紧, 约时间去	BBether	A.1 year	ACampaign/BCustomer	36	NOC	BEst	
Success Submit	不要紧, 呵呵	ABest	D.4 years	DStatistic/EPre-Dialer	23	NOC	BEst	
Failed Submit	DNC	BBether	B.2 years	ACampaign/BCustomer	35	HR	Marvelous, more than I can say	
Success Submit	成功	COood	A.1 year	BCustomer/CVirtual Office/DStatistic	28	TS	OK	

How

to Export the Report of Survey Result

First you should select the type of exporting file, then click the [export] button, and select the execution time.



11.2 Answer Templates

1.Score grade template: 10 points, 9 points, 8 points....;

2.Satisfaction degree template: very good, good, fair, poor, very poor;

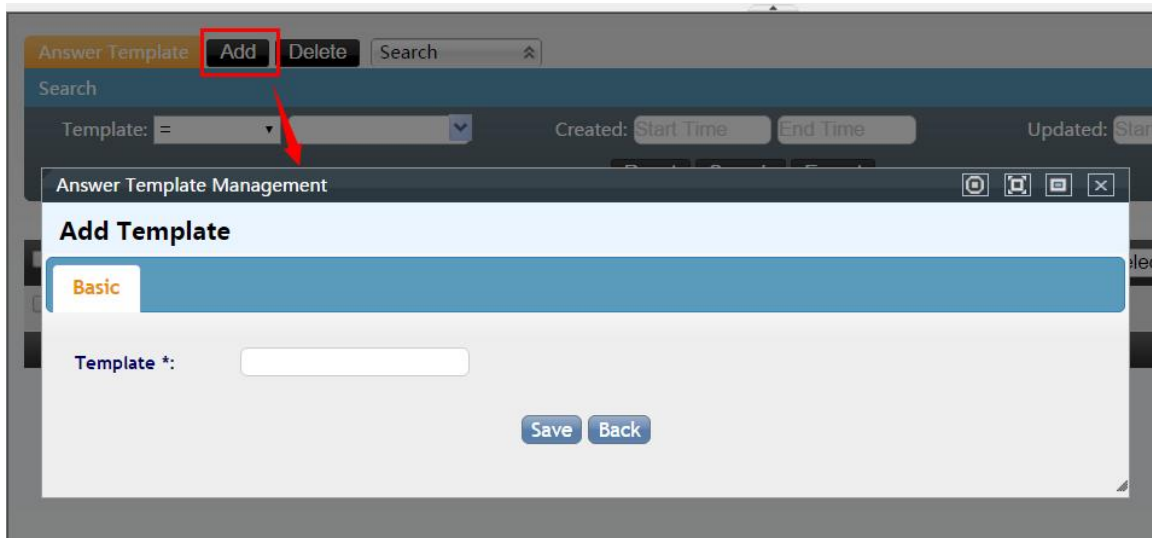
3. Quality level template: very good, good, fair, poor, very poor;

4. Gender template: male, female, unknown, Secret;

and so on. It is trouble that we need input above contents every time when we add item in [Surveys]→[Surveys]→[Edit Option]→[Add], so we need add template to provided “Quick Reference” when we edit option which analogous to above.

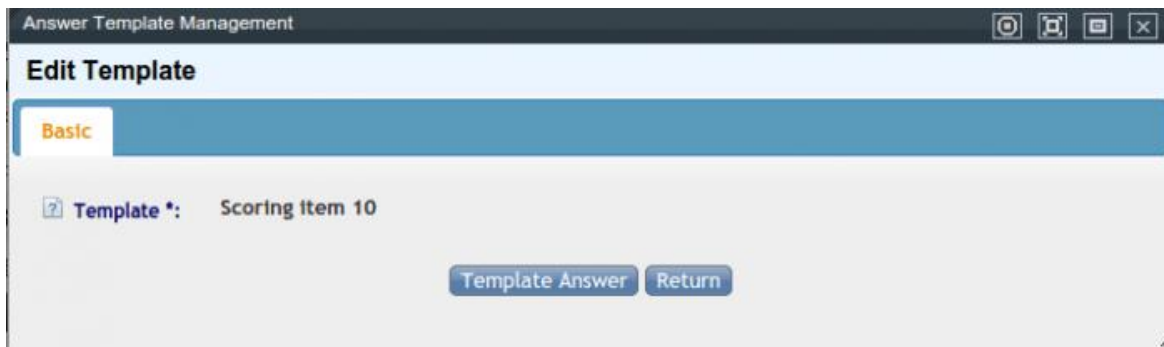
Add Template

Click [Surveys]→[Answer Templates]→[Add], you can see the adding template page, as following:



The screenshot shows the 'Answer Template Management' window with the 'Add Template' tab selected. The 'Basic' sub-tab is active. A red box highlights the 'Add' button in the top navigation bar, with a red arrow pointing to the 'Template *' input field. The input field is empty. Below the input field are 'Save' and 'Back' buttons.

Input a template name, used to identify its function. Click [save] after inputting template name. You should double-click the template when you want to edit it.



The screenshot shows the 'Answer Template Management' window with the 'Edit Template' tab selected. The 'Basic' sub-tab is active. The 'Template *' input field contains the text 'Scoring Item 10'. Below the input field are 'Template Answer' and 'Return' buttons.

Click [Template Answer] button, you can see the "Adding Templateanswer" page, as following:

Answer Template Management

Edit Template

Basic

Template *: Scoring Item 10

Template Answer Return

Template Answer Management

Add TemplateAnswer

Basic

Answer: Atext: No

Expanswer: Export: No

Amemo:

OK Back

Template Name	Answer	Option ExportShow	Enable export display	atext	memo	created	Option
Scoring item 10	6	6	no	no		2015-06-10 15:13:14	Delete
Scoring item 10	7	7	no	no		2015-06-10 15:13:09	Delete
Scoring item 10	8	8	no	no		2015-06-10 15:13:03	Delete
Scoring item 10	9	9	no	no		2015-06-10 15:12:59	Delete

Answer: edit the answer contents. For example, you should input scores in scoring template.

Atext: Whether add text area behind answer to explain the means of contents. For example: Others(please input).

Expanswer: It will replace the answer contents when we export the data(For example: to compute the result of statistics, we can replace answer contents with numbers.

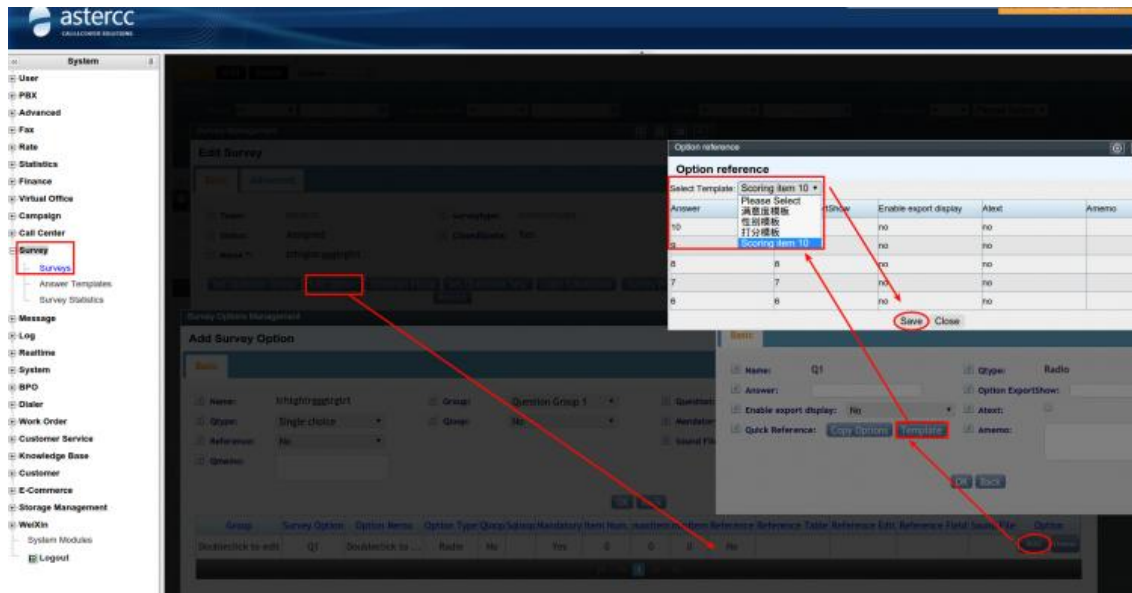
Export: Whether replace answer contents with "Expanswer".

Amemo: Describe the answer to agent.

The answer will appear below after clicking [OK] button. Double-click the data when you modify it.

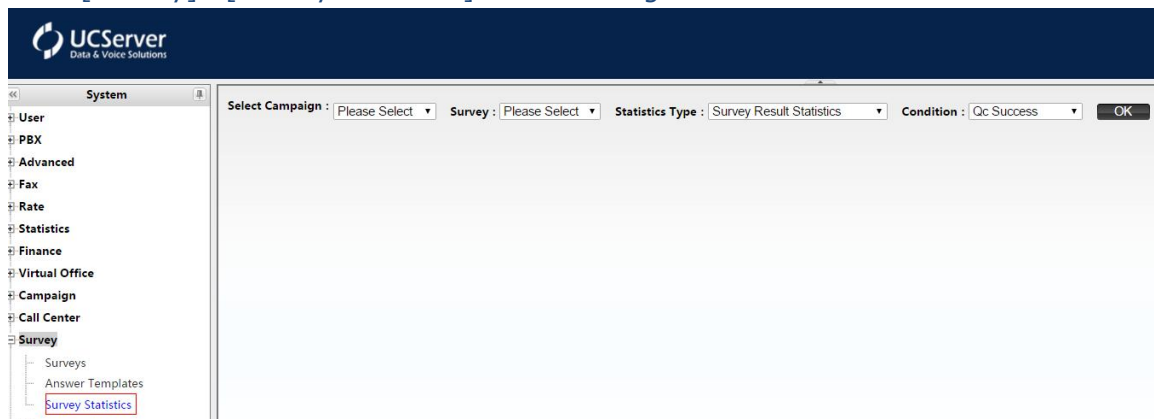


Taking advantage of answer template, we can save time by [Quick Reference]→[Template]



11.3 Survey Statistics

Click [Survey]→[Survey Statistics], as following:



Module Function: Count situation of survey about each campaign, for example: how many people answered, how many people submitted successfully, how many times each option is selected, and so on. Statistics vary due to the difference of "Statistics Type".

First, select the campaign, and then select the survey that belongs the campaign.

Second, select the statistics type, include "Survey Result Statistics(count the number and the proportion of each question and each option)" and "Survey Completed Statistics(Statistics the number of survey be made per day within a certain time)".

Last, select the condition, include "Qc Success(The data qualified by QC)" "Submit Success (The data submitted successfully by agent)" "Submit Failure(The data submitted successfully by agent)".

Survey Result Statistics

Select Campaign : Customer visit Survey : test2 Statistics Type : Survey Result Statistics Condition : Qc Success

test2

G1

Question 1 Q1 Your?

Q1 item1		0	0
		Total	0

Question 2 Q2 what ...?

1 Whether it is satisfied?

yes		0	0
no		0	0
unknow		0	0
		Total	0

2 Whether it is intention?

Survey Completed Statistics

Select Campaign : Customer visit Survey : test2 Statistics Type : Survey Completed Statistics Condition : Qc Success

Select Time : 2013-05-01 2013-05-28 OK

test2

2013-05-01(Wednesday)	0
2013-05-02(Thursday)	0
2013-05-03(Friday)	0
2013-05-04(Saturday)	0
2013-05-05(Sunday)	0
2013-05-06(Monday)	0
2013-05-07(Tuesday)	0
2013-05-08(Wednesday)	0
2013-05-09(Thursday)	0
2013-05-10(Friday)	0
2013-05-11(Saturday)	0

12 Message

12.1 Templates

On the left menu, please go to[**Message**]-> [**Templates**] to open the page.

Templates Add Delete Search

Search

Name: = [] Note: = [] Subject: = []

Type: = [Please Select] Target: = [Please Select] Attach a file: = []

Use Wildcard: = [Please Select] Language: = [Please Select] Created: [Start Time] [End Time]

Reset Search Export xls file

Show Data | Trash |

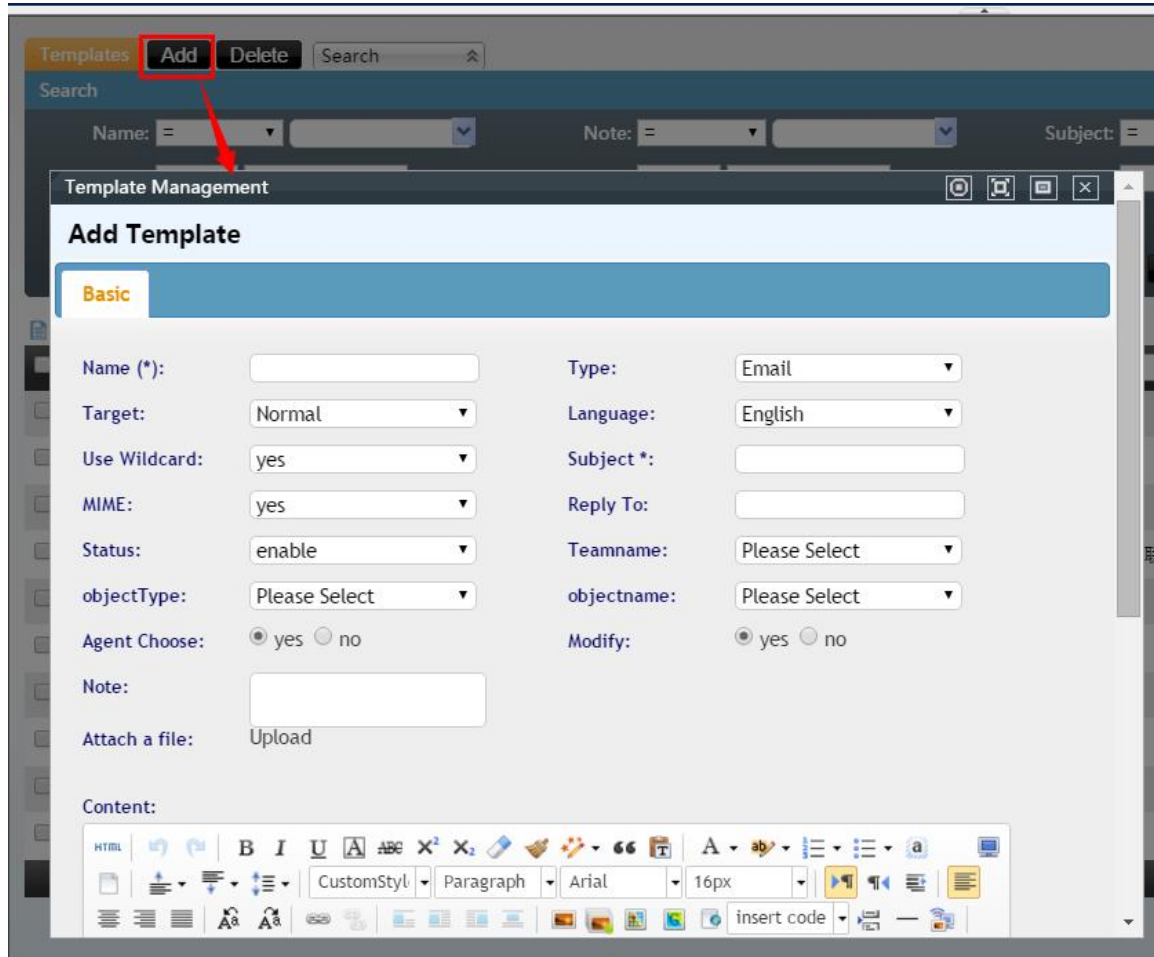
Name	Status	Target	Teaxname	Use Wildcard
<input type="checkbox"/> user bill	enable	userbill		yes
<input type="checkbox"/> team bill	enable	teambill		yes
<input type="checkbox"/> admin bill	enable	adminbill		yes
<input type="checkbox"/> voicemail	enable	voicemail		yes
<input type="checkbox"/> Task template	enable	task		yes

Listed 11 - 15 Records, Total 15 Records, Total 2 Page Jump To

Module Function:The template reduces the input work when sending messages or emails. Set the contents that are used frequently or batch sent as templates, and that will high increase the working efficiency.

Some templates are preset by the system as the service notification. You can modify their contents and layout.

Add



The screenshot shows the 'Template Management' window with the 'Add Template' tab selected. The 'Add' button in the top navigation bar is highlighted with a red box and an arrow. The form contains the following fields:

- Name (*):** Text input field
- Type:** Dropdown menu (set to 'Email')
- Target:** Dropdown menu (set to 'Normal')
- Language:** Dropdown menu (set to 'English')
- Use Wildcard:** Dropdown menu (set to 'yes')
- Subject *:** Text input field
- MIME:** Dropdown menu (set to 'yes')
- Reply To:** Text input field
- Status:** Dropdown menu (set to 'enable')
- Teamname:** Dropdown menu (set to 'Please Select')
- objectType:** Dropdown menu (set to 'Please Select')
- objectname:** Dropdown menu (set to 'Please Select')
- Agent Choose:** Radio buttons (selected 'yes')
- Note:** Text input field
- Attach a file:** 'Upload' button
- Content:** Rich text editor with various formatting tools

Name : Enter a name for this template, better reflecting this purpose.

Type : For SMS, email, or fax.

Only SMS can be sent with the SMS template, and the same for emails and faxes.

Target: Normal template or application template

If you are just to send some ads, notices, choose normal.

Application template includes tasks, bills, voicemails, working as the notice function of the corresponding modules in the system. When you need to redefine these templates, you can refer to the default templates of the system: add a new template, and change the status of the default template to **Disable**, and enable your new template. Next time the system would use your new template to send messages.

Language: The language in the template (a same email can be set in different languages), thus agents can send them to customers with different language preference.

Optional languages are from **System → Language**

Use Wildcard: let the system know whether your email uses wildcards. The system will replace the variables for you.

For example, the SMS is: Dear ##param0##, your balance is \$\$\$param1##, the left net flow is ##param2##M.

We call parameters like ##param0## system variables (they are assigned by the system, we will explain later).

Subject: Email template needs this for the email subject.

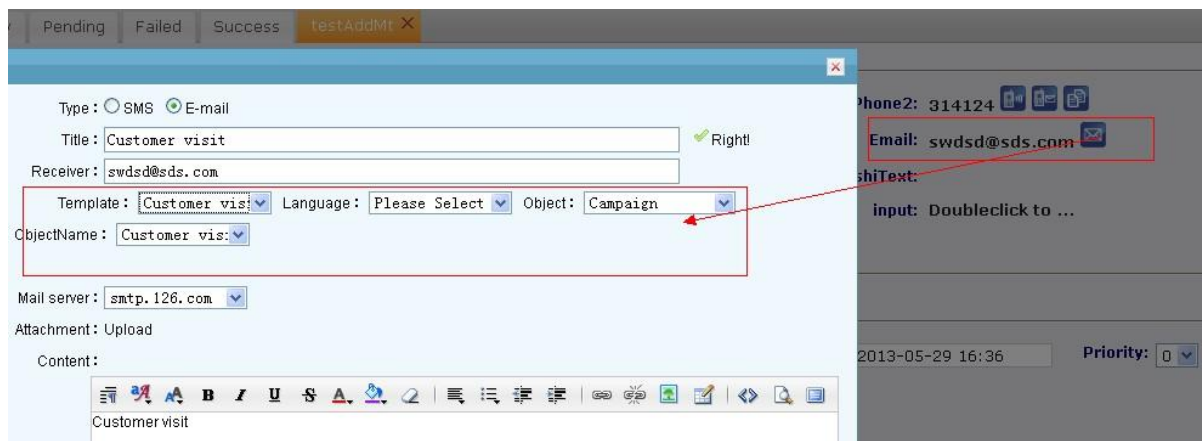
MIME: for email template. Please choose "yes" (the templates are html), to identity the email contains more than words.

Status: Only available template can be chosen. Only one application template (task, bill, voicemail) of one language can be chosen by a team. Because applicaiton templates are for system, and if there are multiple available templates, the system will not be sure which template the messages are sent from.

Team name: If enter a team name here, then this template can only be used within this team. Leave it blank and all teams can use it.

Object type, object name: mark the application range, applying to which application under which module.

If you set a special module for an application, when agents click send (email or sms) button on campaign popup or customer Service popup, the system will choose templates for you automatically.



Agent choose: templates which allow agents to see and choose from.

Modify: Whether allow senders to modify the contents when using this template.

In the sms or email sending page, agent chooses a template, and the system will add the subject and contents into the page. If this template do not allow modify, then it shall be sent exactly the same as it has been set. If modify is allowed, agent can change some variables and then send.

Note: like remarks, for remind you of the purpose or etc of this template. And you can leave it blank.

Attach a file: You have to upload a file when this template is for fax, and it has to be pdf, doc or docx.

And the template for email can be anything according to your needs.

Content: the content of emails or sms.

The content of SMS may contain text content, including Chinese characters, English characters, symbols. This does not support images or music. Each sms contains 140 characters. Contents exceed the limit will be split into more than one sms.

The contents of emails do not have limit. Paste contents which has been cut or copied for txt notebook, because the system cannot analyse some symbols from Word, thus would cause a loss of the contents. Plus, you can copy the contents from Word and paste in Gmail, and google will change them into html.

Variables

When you send sms or emails, you need to change some information in a template first.

Then you need to use variables in the email.

Like when the ticket has been booked successfully, an sms with the ticket number will be sent to the customer. The content of the sms can be like this:

You have booked ##param1## ticket(s) of Cinema ##param0##. The order number is ##param2##. Please use before June, 30, 2013.

When you are sending mass sms, the system will correspond the data row with the parameters according to the customer information and sms template. The information will replace the variables automatically.

Please select the file to import (csv/xls)
 Uploaded File: test.csv [Delete](#)

Select Team
 astercc

Select the table you want to import
 Mass target custom

0. email
 1. phone
 2. param0
 3. param1
 4. param2
 5. param3

Here displays the first 10 records of the file 【Server Time : 2013-05-29 16:35:39】

1381234112	XXX	2	xxx00992145	tuan800
1381234113	XXX	2	xxx03456704	tuan800
1381234114	XXX	2	xxx09232119	tuan800
1381234115	XXX	2	xxx01234213	tuan800
1381234116	XXX	2	xxx00992234	tuan800
1381234117	XXX	2	xxx33992215	tuan800
1381234118	XXX	2	xxx00925256	tuan800
1381234119	XXX	2	xxx00563212	tuan800

phone ☐ param0 ☐ param1 ☐ param2 ☐ flag ☐

Please select when to import (leave it blank if you want to do it now): 2013-05-29 16:35 Remove the first ☐ row when import

What parameters are provided by the system? What do they mean?

1. In mass sms, we provide 10 variables, that is

##param0##, ##param1##.....##param9##. The senders can define which parameter correspond to what data.


the following variables, system will replace the content with the value in system.

2. Task template

? Name (*):	Task template	? Type:	Email
? Target:	task	? Language:	English <small>other: Success-fail</small>
? Use Wildcard:	yes	? Subject *:	Task Notice
? MIME:	yes	? Status:	enable
? Teamname:	Please Select	? objectType:	Please Select
? objectname:	Please Select	? Agent Choose:	no
? Modify:	yes	? Note:	Release task or...

? Attach a file: Upload

? Content:



###taskid##: ##title##

Sender Name: ##sender## | Receiver Name: ##receiver##

Sender Type: ##sendertype## | Receiver Type: ##receivertype##

Scheduler: ##scheduler## | Status: ##status##

Priority: ##priority## | TicketCategory: ##ticketcategoryname##

Changes (by ##email##):

* ##option##

##taskid##: The id of the task;

##title##: the title of the task;

##sender##: who releases the task, aka the sender

##sendertype##: the type of the sender

##receiver##: the receiver of the task

##receivertype##: the type of the receiver

##status##: the status of the task

##scheduler##: the predicted start time of the task;

##priority##: the priority level of the task

##ticketcategoryname##: the name of the task's category

##email##: the sender

##option##: the content of the task or modification histories.

3. voicemail(The template of voicemail, when you get voice message, the system will inform the device)


Edit Template

Basic

Name (*):	voicemail	Type:	Email
Target:	voicemail	Language:	English
Use Wildcard:	yes	Subject *:	voicemail
MIME:	yes	Status:	enable
Teamname:	Please Select	objectType:	Please Select
objectname:	Please Select	Agent Choose:	no
Modify:	no	Note:	voicemail

Attach a file: Upload

Content:



This is the voicemail template example

##teamname## is the team name
 ##devicename## is the device name
 ##origdate## is the time
 ##callerid## is the callerid

##teamname##: team name

##devicename##: device name

##origdate##: the time when the message happens

##callerid##: the phone number of the person who calls

4. admin bill, team bill, user bill, phone bill which sent on the same set time every month

asterCC Electronic Bill		Admin					
##param_zipcode## ##param_country## ##param_city## ##param_address## ##param_username##		<table border="1"> <thead> <tr> <th>Statement Date</th> <th>Current Balance</th> </tr> </thead> <tbody> <tr> <td>##param_statementstart##~##param_statementend##</td> <td>##param_currentbalance##</td> </tr> </tbody> </table>		Statement Date	Current Balance	##param_statementstart##~##param_statementend##	##param_currentbalance##
Statement Date	Current Balance						
##param_statementstart##~##param_statementend##	##param_currentbalance##						
Name	Phone number	Address	E-mail				
##param_username##	##param_phonenumber##	##param_address##	##param_email##				
Invoice Date: ##param_invoice##		Statement ##param_statementstart##~##param					
Payment Due Date: ##param_paymentdue##		Date: _statementend##					
##param_datalist##							
Team Name		Credit	Cost				
Current Balance: Y ##param_currentbalance##							

##param_logo##: the logo of the bill, astercc's logo at default. To change the picture please go to /var/www/html/asterCC/data/billpage/astercc_logo.png

##param_zipcode##: the zipcode of the target account.

##param_country##: the country of the target account.

##param_city##: the city of the target account.

##param_address##: the address of the target account.

##param_username##: target account

##param_statementstart##: the start date of the bill

##param_statementend##: the end date of the bill

To know about the meaning of the variables please refer to the Chinese name of the parameters.

12.2 Send in bulk

This page is for sending sms or emails in bulk.

Customer Source

Import data to mass target customers

Call Center → *Import*, upload the file, and choose mass target customer (See the picture)

The data in the file contains three parts, the first we call it target, and it is a must, that is the telephone number or email address of the customer. The second part is the variable data (e.g., the customer name, remaining balance, order number etc.). If the template does not employ any variable, you do not need to put such data in the file. The third part is what we call a tag, and it is a must, too, for marking the customers we uploaded. You can take it as a category. The bulk-sent messages are delivered by the tags.

Please select the file to import (csv/xls)

Here displays the first 10 records of the file 【Server Time : 0000-00-00 00:00:00】

Select Team

UCServer

Select the table you want to import

Mass target customers table

Acco

rding to the settings of the template you are going to use, match the customer information with the variables accordingly. See the picture,

Here displays the first 10 records of the file 【Server Time : 2013-06-13 09:59:21】

Phone	Name	Numbers	Code	Flag
1381234112	XXX1	2	xxx00992145	tuan800
1381234113	XXX2	2	xxx03456704	tuan800
1381234114	XXX3	2	xxx09232119	tuan800
1381234115	XXX4	2	xxx01234213	tuan800
1381234116	XXX5	2	xxx00992234	tuan800
1381234117	XXX6	2	xxx33992215	tuan800
1381234118	XXX7	2	xxx00925256	tuan800
1381234119	XXX8	2	xxx00563212	tuan800

phone ☐ param0 ☐ param1 ☐ param2 ☐ flag ☐

Please select when to import (leave it blank if you want to do it now) : 2013-06-13 09:56 Remove the first 1 row when import

Select Field

- email
- phone
- param0
- param1
- param2
- param3
- param4
- param5
- param6
- param7
- param8
- param9
- flag

param0、param1...param9

Generally, the first line of the file is the title, not the actual data, so we need to remove the first line. At the meantime, we need to set the execution time of importing, that the system will import the data at that time. When the time is before the present time, it means import immediately.

Here displays the first 10 records of the file 【Server Time : 2013-06-13 10:05:58】

Phone	Name	Numbers	Code	Flag
1381234112	XXX1	2	xxx00992145	tuan800
1381234113	XXX2	2	xxx03456704	tuan800
1381234114	XXX3	2	xxx09232119	tuan800
1381234115	XXX4	2	xxx01234213	tuan800
1381234116	XXX5	2	xxx00992234	tuan800
1381234117	XXX6	2	xxx33992215	tuan800
1381234118	XXX7	2	xxx00925256	tuan800
1381234119	XXX8	2	xxx00563212	tuan800

phone ☐ param0 ☐ param1 ☐ param2 ☐ flag ☐

Please select when to import (leave it blank if you want to do it now) : 2013-06-13 09:56 Remove the first 1 row when import

Click **Import** and appears the following notice,



Remember this plan number, and go to *Call Center* → *Import* to check the progress with this number.

Call Center

App Binding
Import
Shell Import Jobs
Import Dict
Shell Exports
Link Urls
Business APPs
Common Contacts
Field Categories
Fields

【Server Time: 2013-06-13 10:07:48】

Import Jobs Refresh Now

ID	Target	Filename	Status	Total	Success	Error	Duplicate	Success Rate	Executed At	Creby	Success Data	Error Data	Duplicated Data	Original Data
422	Temp Guide	test.csv	Closed	8	8	0	0	100%	2013-06-13 09:56:00	admin	Download			Download
421	Temp Guide	test.csv	Closed	8	8	0	0	100%	2013-05-29 18:42:00	admin	Download			Download
420	Temp	test.csv	Closed	8	8	0	0	100%	2013-05-29	admin	Download			Download

How to bulk send

Messages → *Bulk Send*

Step 1, choose sms or email and the customer source. (See the picture)

Bulk Send Guides (Step 1)

Please select messages type

First, you need to determine what message you want to send in bulk.

SMS: Select this, then we will list the customers who have mobile phone number in database.

EMAIL: Select this, then we will list the customers who have the email information in database.

e.g.: Select sms, then we will list the customers who have the mobile informations in the second step;

Please select what message to send:

☒ SMS

☐ Email

Select the target customer source:

Mass target customers table

Next

Step 2, Choose a label and find the target customers in the source.

1. If mass customers list is being used, you will see,

Bulk Send (Step 2)

Confirm customers

This step will determine which customers to send.

First select the customers label, then it will show the number of this label behind the label name;[LabelName(numbers of the customers has email or mobile/numbers of the customer owned)]

owned the total numbers of customers 1771 person

please select the label : tuan800 (32/32) Delete

According to your choice,we list the top 12 customers information(The actual number of sending message is subject to the numbers of customer who have email or mobile) under this label:

target	param0	param1	param2	param3	param4	param5	param6	param7	param8
1381234112XXX	2	xxx00992145							
1381234113XXX	2	xxx03456704							
1381234114XXX	2	xxx09232119							
1381234115XXX	2	xxx01234213							
1381234116XXX	2	xxx00992234							

Up Next

The first 12 data are default shown under the label for you to check whether the corresponding relation is correct. (The relation between the variables and data is determined when imported.)

2.If individual customers list is being used, you will see,

Bulk Send (Step 2)

Confirm customers

This step will determine which customers to send.

First select the customers label, then it will show the number of this label behind the label name;[LabelName(numbers of the customers has email or mobile/numbers of the customer owned)]

owned the total numbers of customers 1339 person

please select the label : Empty (1223/1229)

According to your choice,we list the top 12 customers information(The actual number of sending message is subject to the numbers of customer who have email or mobile) under this label:

Please select	Please select	Please select	target	P1
age	birthdate	idcard	phone1	pho
27	1986-08-01		043181159018	
	0000-00-00		13843674818	

Up Next

These tabs from Customer → Individual Tags. Only when customers have chosen this labels can we find them through the labels.

Like 1, 12 data are shown here; but you have to choose corresponding relation between data and variables.

You must choose target and tell the system which line is the target number (telephone number field) or email (email address field). The system will send the sms or email to the target.

Secondly choose which data match which parameters.

Please select	param0	Please select	target
age	birthdate	Please select	phone1
27	1986-08-01	target	043181159018
	0000-00-00	param0	13843674818

We can also see the following information in step 2,

We have XXXX customers, which means how many customers are there in this list.

A series of numbers is behind each label, the names of the labels (1/2)

1 means the number of people who have emails or phone numbers (due to your way of sending), that is the number of people that are to be send the message to actually.

2 means the total number of the people who have this label.

Step 3, choose a template and set sending time.

Bulk Send (Step 3)

select templates

We will send your e-mail or SMS by your setting format

schedule: 0000-00-00 00:00

content:

The success of your ##param0## movie ticket reservation

##param1## zhang. Order number ##param2##, please before

30 June 2013 to use.

template

Field search

cinema ticket

99999999

ssssms

12sss

Up Next

Double click a template, and let its content shown on the content area.

Step 4, preview. See the picture,

Bulk Send (Step 4)

Preview content and style

title:

affix: <noAffix>

content:

The success of your XXX movie ticket reservation 2 zhang. Order number xxx00992145, please before 30 June 2013 to use.

Up Next

The system will replace the parameters with information of the first customer, and you can check whether it is correct.

Step 5, send.

Bulk Send (Step 5)

Send Message

This is the last step of temp guide

This page lists the data described in detail in this temp guide, if properly, need to change, please return to the third step to correct!

Sendmode: sms	Customer: tuan800
Pre-send number: 32	Pre-send schedule: 0000-00-00 00:00
Template Name: cinema ticket	

Confirm that the above information is without errors, click the bottom right corner **【Send】** button to start sending the messages!

Up Send

You have to confirm the way of send, customers, the number of messages, setting time, the name of the template.

If you are to send emails, you have to choose the email server, that is, which emails address you are using to send customer emails.

Click **Send**. Seeing the notice of sending successfully means the data are in the sending queue.



You can check the messages which are failed to be sent or unsent in Messages → Archive.

After the messages are sent successfully, they will be moved to 群发 Message →

Batchcontact Sents.

12.3 Batchcontacts

The process that operators send SMS or email in the system is the starting a send task, and batch processing. Therefore the working efficiency will be increased and the waiting time of staff will be decreased during the sending process.

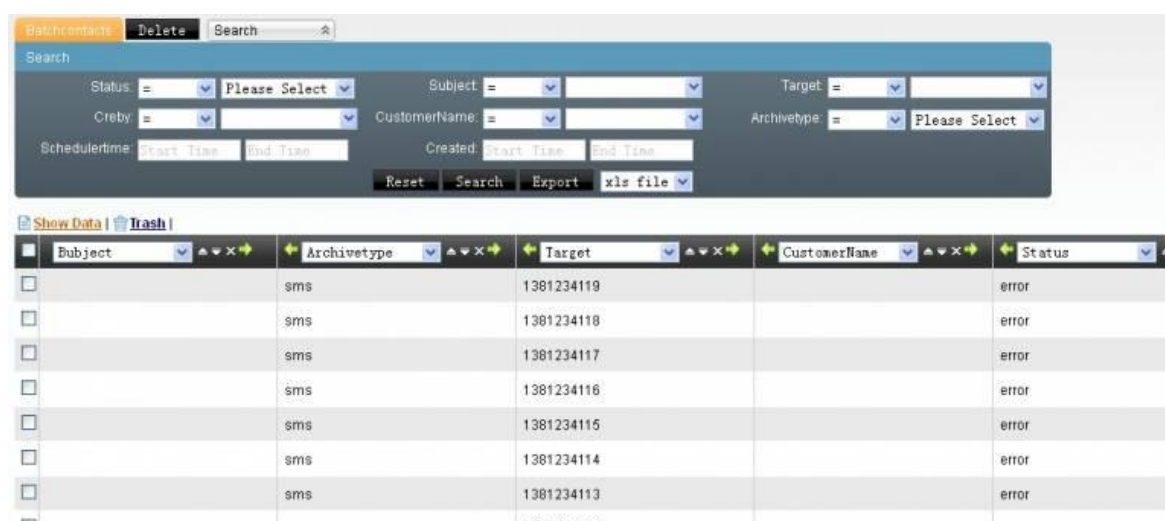
Unprocessed tasks and tasks unsuccessfully processed (can be searched with status field) will be listed on the batch contacts page. You can see this page as a journal list.

What data are on the batch contacts page?

1. unprocessed SMS and email
2. SMS and email being sending
3. SMS and email failed to send

You can search with the status field to see the data that are of the same type.

If the SMS or the email has been sent successfully, then the system will transfer the data from this page to **Archives**.



Double the message in the list to edit the message.

Batchcontact Management

viewBatchcontact

Basic

CustomerName: Subject: Doubleclick to ...

Target: 13817463918 Status: new

Archivetype: sms Created: 2016-03-17 13:2...

Schedulertime: 0000-00-00 00:00:00

Content: 通4余有王企鹅

[Return](#)

You can modify the data of the failed message, and change the status into "New", and the system will try to send it again.

12.4 Batchcontact Sents

It works as the send log, it will keep all messages which are sent successfully
On the left menu, please go to **[Message]** -> **[Batchcontact Sents]** to open the page.

Batchcontact Sents

Search

Subject: Target: CustomerName: Creby: Team: Archivetype: Created: Schedulertime: Contacttime:

[Reset](#) [Search](#) [Export](#)

Archivetype	Subject	Target	CustomerName	Status	Contacttime	Schedulertime
email	[工单]#4-3: 来电咨询	guilei@ucserver.cc		success	2015-12-10 15:38:03	0000-00-00 00:00:00
email	[工单]#4-3: 来电咨询	guilei@ucserver.cc		success	2015-12-10 15:36:03	0000-00-00 00:00:00
email	[工单]#4-2: 客户投诉	guilei@ucserver.cc		success	2015-12-10 14:45:03	0000-00-00 00:00:00
sms		18616201690		success	2015-03-26 12:34:02	0000-00-00 00:00:00
sms		18616201690	未知	success	2015-03-26 12:32:42	0000-00-00 00:00:00
sms		13701688752	曹辉	success	2014-10-22 13:48:38	0000-00-00 00:00:00
sms		013564139158		success	2014-10-22 09:18:52	0000-00-00 00:00:00
sms		15021743313	fan	success	2014-10-21 17:20:58	0000-00-00 00:00:00
sms		15021743313	fan	success	2014-10-21 17:15:30	0000-00-00 00:00:00
sms		13669235338		success	2014-09-26 19:32:29	0000-00-00 00:00:00

If you want to re-sent a message, you can edit the record, change the status to "New"

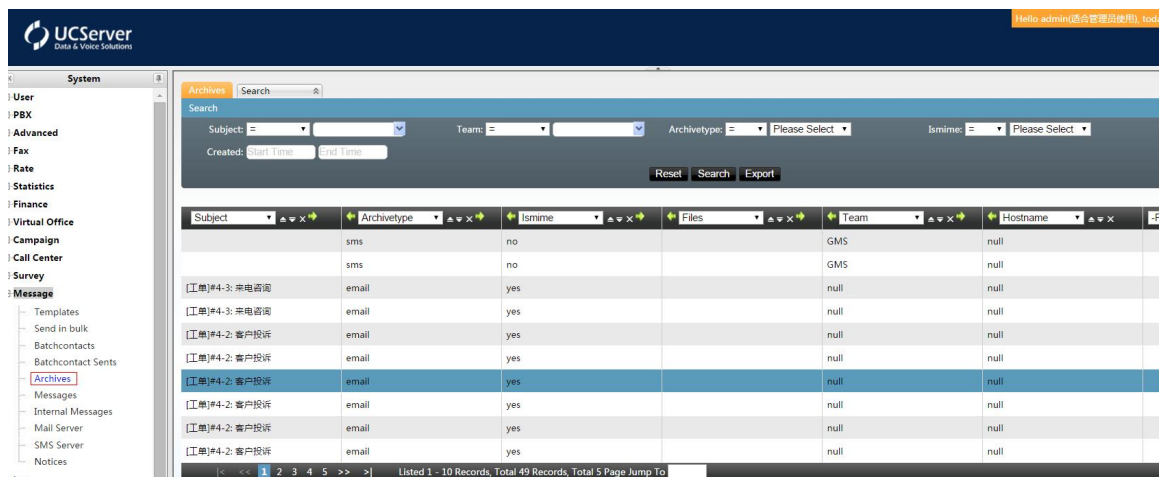


12.5 Archives

This page is designed to work with Batchcontacts and Batchcontact Sents.

It mainly shows the information of the messages, like which server the sender has chosen when sent this message, what attachment has been uploaded, which template has been used and the contents of the messages.

On the left menu, please go to **[Message]** → **[Archives]** to open the page.



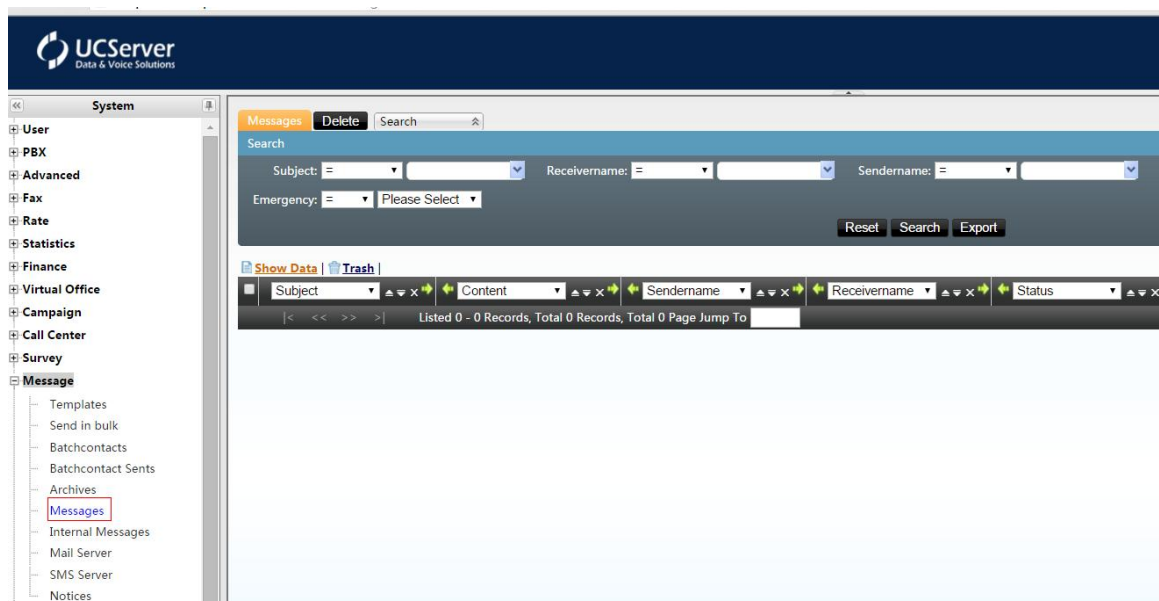
Double click the data in the list to see details.



Archives are for view only, cannot be added, edited, or deleted.

12.6 Message

This page is for checking the internal messages you sent and received.



The "unread" status means the receiver has not read the message. When the receiver double click the message record, the status would turn to "read"

Message

View Message

Basic

Subject: sdfdfdfdf Sendername: admin

Receivername: admin Sender Type: account

Receiver Type: account Sender Team:

Receiver Team:

Emergency: normal Status: read

Created: 2011-01-14 16:56:43

Content:

CCCCCCCC

Return

12.7 Internal Message

Internal Message is used to send messages between system users.

receiver: Please select the staff list

title:

content:

accounter template

-Select F search

☐ Select All

☐ test001 Account astercc

☐ testteamadmin Account astercc

☐ shi2017 Account astercc

☐ 7002 Account astercc

☐ 7001 Account astercc

☐ 7000 Account astercc

☐ asf5 Account astercc

☐ asf4 Account astercc

☐ bao Account

☐ 修正科技6 Account 修正药业

☐ lol Account shi

☐ webao Account astercc

☐ shi Account astercc

☐ 9349 Account astercc

☐ 9348 Account astercc

☐ 22 Agent astercc

☐ 23 Agent astercc

☐ 42 Agent astercc

sent reset

How to send a internal message:

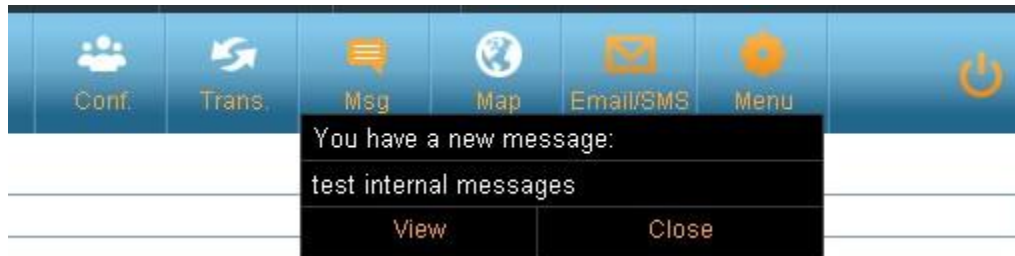
1. Select the target, you can select several accounts when you send a message
2. Write a message, you can use template

3. Write a subject

4. Send the message

When the message is sent, you can check it from [archives](#)

The receiver will read the message notice



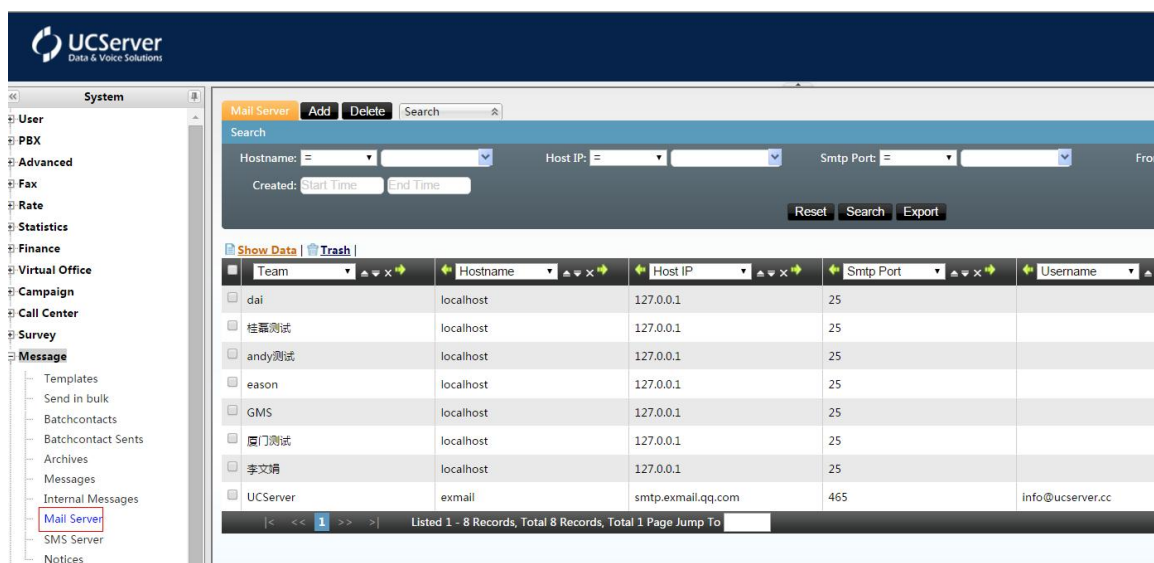
en/module

12.8 Mail Server

When the system or team has set a valid email account, and astercc system will send emails out of this email address.

This is used in Send in bulk, Agent Message, Invoice, Work Order etc.

Message→ Mail server to enter the page below.



Add

Click [Add] to open the mail server add page.

The screenshot shows the EQUINET Mail Server management interface. At the top, there are buttons for 'Add' (highlighted with a red arrow) and 'Delete', along with a search bar. Below these are filters for 'Hostname', 'Host IP', 'Smtip Port', and 'Created' (with 'Start Time' and 'End Time' dropdowns). A modal window titled 'Smtipserver Management' is open, displaying the 'Add Email Server' form. The form has a 'Basic' tab selected. It contains the following fields:

- Team: Select Team (dropdown)
- Mode: Daemon (dropdown)
- Host IP *: (text input)
- From *: (text input)
- Status: Enable (dropdown)
- Username *: (text input)
- Server Type: SMTP (dropdown)
- Hostname *: (text input)
- Smtip Port: 25 (text input)
- Default: Yes (dropdown)
- SSL: No (dropdown)
- Password *: (text input)

At the bottom of the form are buttons for 'Test Connect', 'Save', and 'Back'.

Team: If you do not choose a team, this mail server will be used to send emails at system level. If you assign a team, this team will be using this email address to send emails.

Server type: SMTP. Reliable. If your email address has not been blacklisted by the service provider, all emails can be sent. Setting this kind of emails needs account and password. When the system sends emails, it will submit review to the service provider, after passed, the emails will be sent. (You can understand this way: someone login your email with your account and password and send an email)

Local host. Unreliable, but easily set. Enter an email address randomly, even if it dose not belong to you. Emails can be sent by the name of that address.

If the email suffix (content after @)you enter dismatch your server and SMTP server, the email basically cannot be sent successfully. (QQ mail, 163 mail are most likely to be rejected, gmail can send successfully sometime.)

Mode: After created, whether the email will be sent immediately or enter the background for Daemon.

Php, means send immediately. When created the email, choose this kinds of email server, click [send]. The system will send this email immediately, and now you need to wait for the result (successful or fail). According to the result the system will show an archives journal (successful) or a due out message journal (fail). The advantage of this mode is to send one email immediately without waiting for the process. The disadvantage is that you need to wait for the result which can take long.

Daemon, same spped as php. This mode process a batch of emails every minute, and you do not need to wait for the results. That agents create the email and click send equals saving a due out journal in the system, and the emails will be sent according to the journal.

When send a large volume of emails, we recommend you use Daemon mode.

Hostname: If you have an email account `menglj@163.com`, we call 163 mail the host, aka the service provider.

You can enter anything here for identity the source or purpose of this email. Thus, agents will be aware of which mail server is to choose.

Host IP: The server IP of the service provider. For instance, you want to send emails with your gmail account, you should enter `smtp.gmail.com`. For other host ip, please consult the provider.

SMTP port: the SMTP port. Gmail enter 465. For others, please consult the provider.

From: Your email address, that is, from which address will the emails be sent. E.g., `menglj@hotmail.com`

Default: to tell the system which server will be used when sending emails. Each team can only have one default server (servers with no team selected can only have one default server, too)

Like when system send bills at fixed period, we would use the system default server. When the work order changes, we use default server to send to the cc.

When send mail manually, sender can choose which mail server to use, default means to use this mail server when no one is chosen.

Status: Only when it is available can this server be selected by the sender. Similarly, only available server can be used when the system sends emails.

SSL: SSL is a network communication safety protocol. This shall be written by the provider. Mostly, we choose *no*, but if you use gmail, please choose *yes* here.

User name, password: When you choose Server type=SMTP, please enter the use name and password of your (sender's) email address.

According to different requirement of providers, user names can be different.

If you use gmail and the email address is `menglj@astercc.com`, you need to enter `menglj@hotmail.com` in the user name;

If you use 163 email, your address is `menglj@163.com`, you need to enter `menglj` in the user name.

For others please consult providers.

Enter the **password** to your email account here.

When server type= php, username and password are not necessary.

Test connect: Finishing all and click **[Test connect]** (aims at Server type= SMTP), when you see the red tips saying: *connect success!*, the server works, otherwise the server

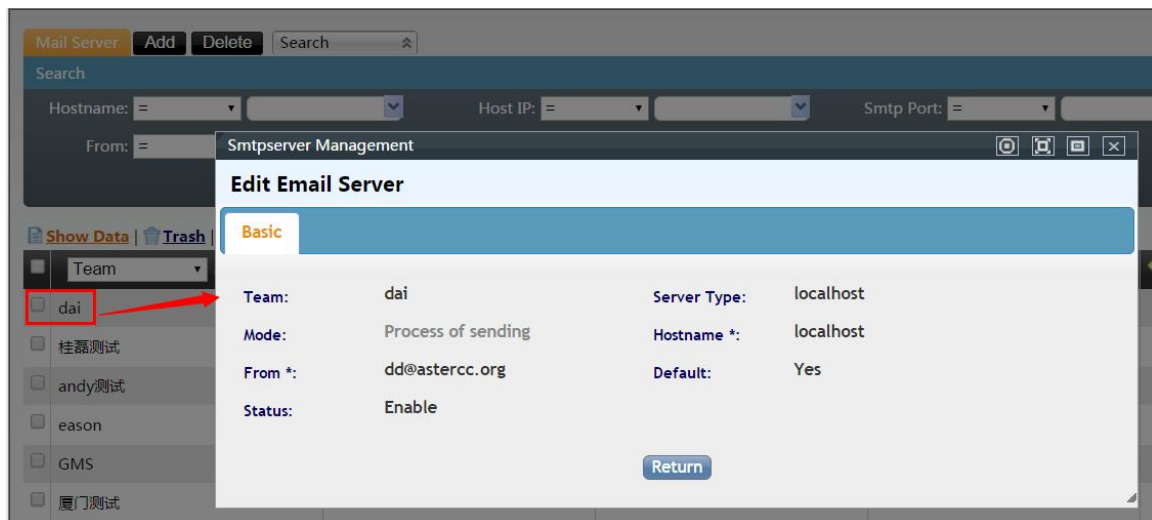


cannot send emails.

After finishing it, please click [Save] button.

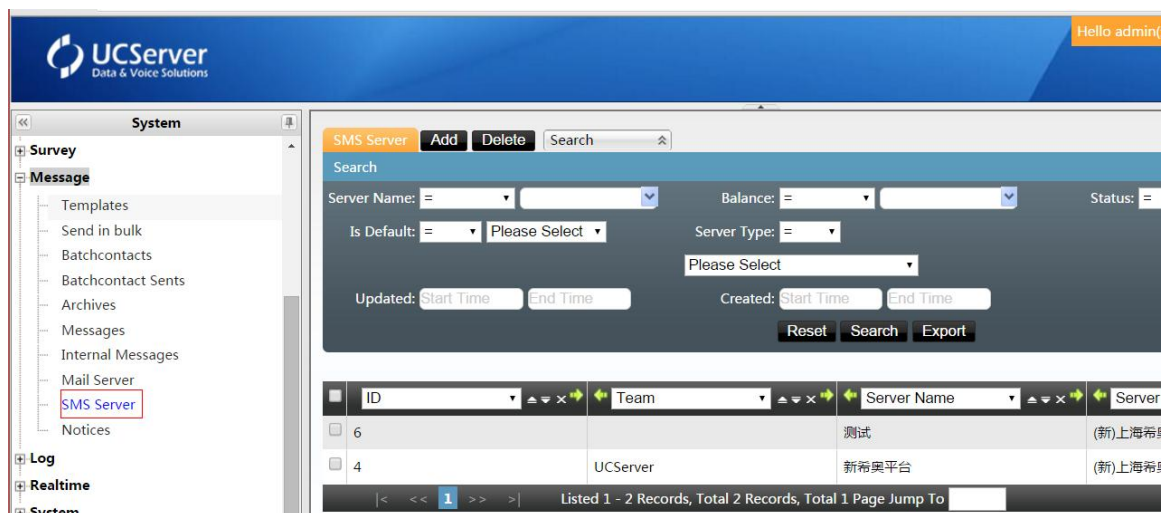
Edit

Double-click the server has been added, we can edit it, as following:



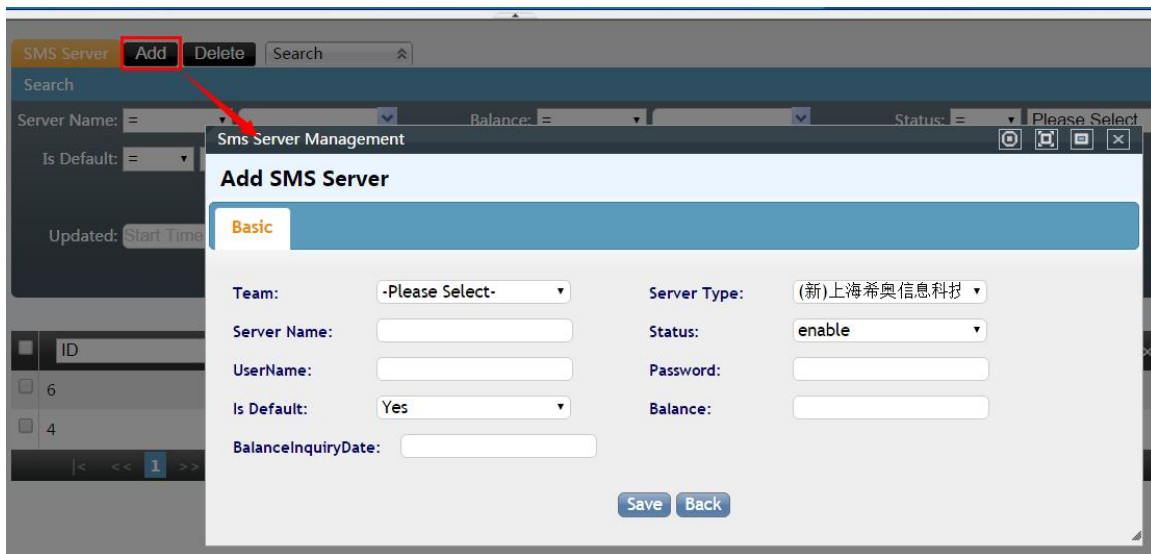
12.9 SMS Server

On the left menu, please go to **[Message]** -> **[SMS Server]** to open the page.



Add

Click **[Add]** to open the SMS server add page.



The screenshot shows the 'SMS Server Management' interface. At the top, there are buttons for 'Add' (highlighted with a red box and arrow) and 'Delete', along with a search bar. Below these are filters for 'Server Name', 'Is Default', and 'Updated: Start Time'. A table lists servers with columns for 'ID' and 'Status'. A modal dialog titled 'Add SMS Server' is open, featuring a 'Basic' tab. The dialog contains the following fields:

- Team: -Please Select-
- Server Name: [Text Input]
- Username: [Text Input]
- Password: [Text Input]
- Is Default: Yes
- Balance Inquiry Date: [Text Input]
- Server Type: (新)上海希奥信息科技
- Status: enable

At the bottom of the dialog are 'Save' and 'Back' buttons.

Team: If you do not choose a team, this SMS server will be used to send SMS at system level.
If you assign a team, this SMS server is team level.

Server type: Select a server type

Server Name: You can enter anything here for identity the source or purpose of this SMS.
Thus, agents will be aware of which SMS server is to choose.

Status: Only when it is available can this server be selected by the sender. Similarly, only available server can be used when the system sends SMS.

User name, password: Give a user name and password this server.

IS Default: to tell the system which server will be used when sending SMS by default. Each team can only have one default server (servers with no team selected can only have one default server, too)

When send mail manually, sender can choose which mail server to use, default means to use this SMS server when no one is choosen.

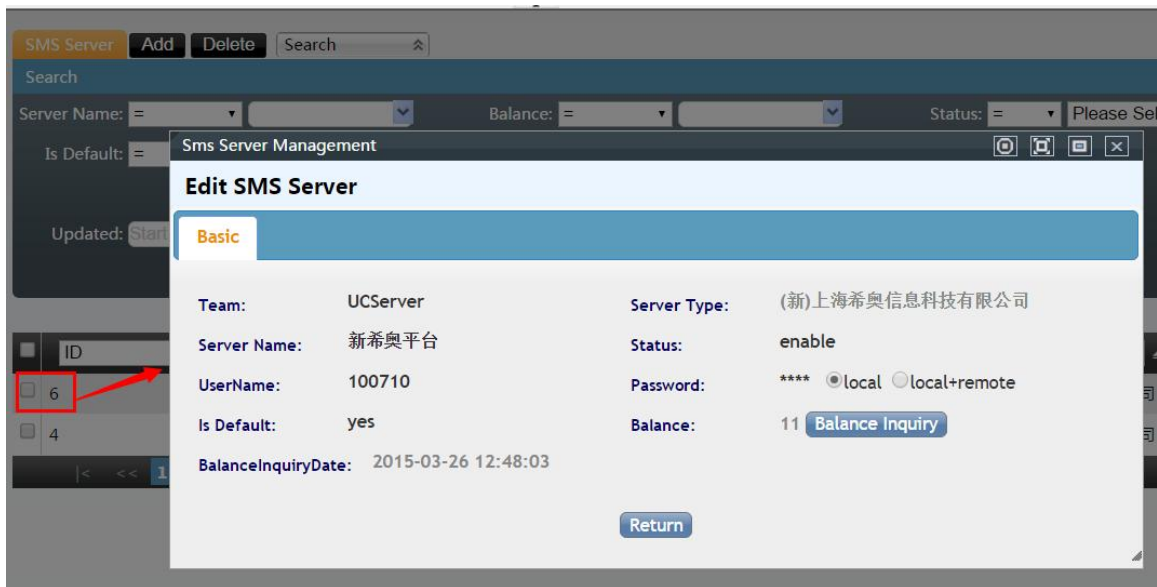
Balance: How much balance left for sending SMS.

Balance Inquiry Date :

After finishing it, please click [Save] button.

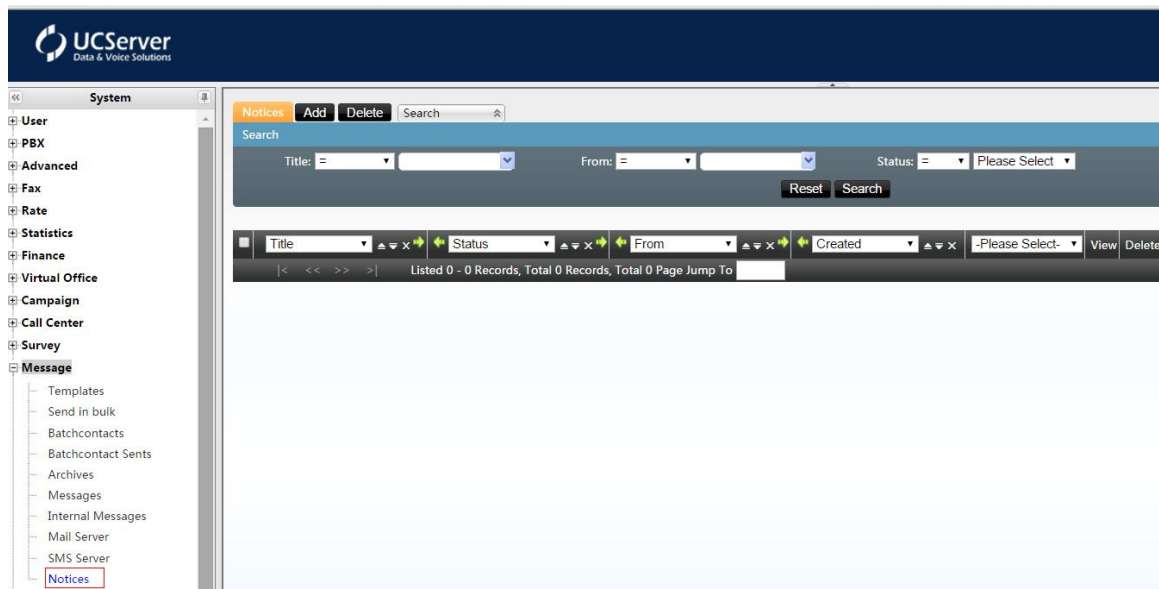
Edit

Double-click the server has been added, we can edit it, as following:



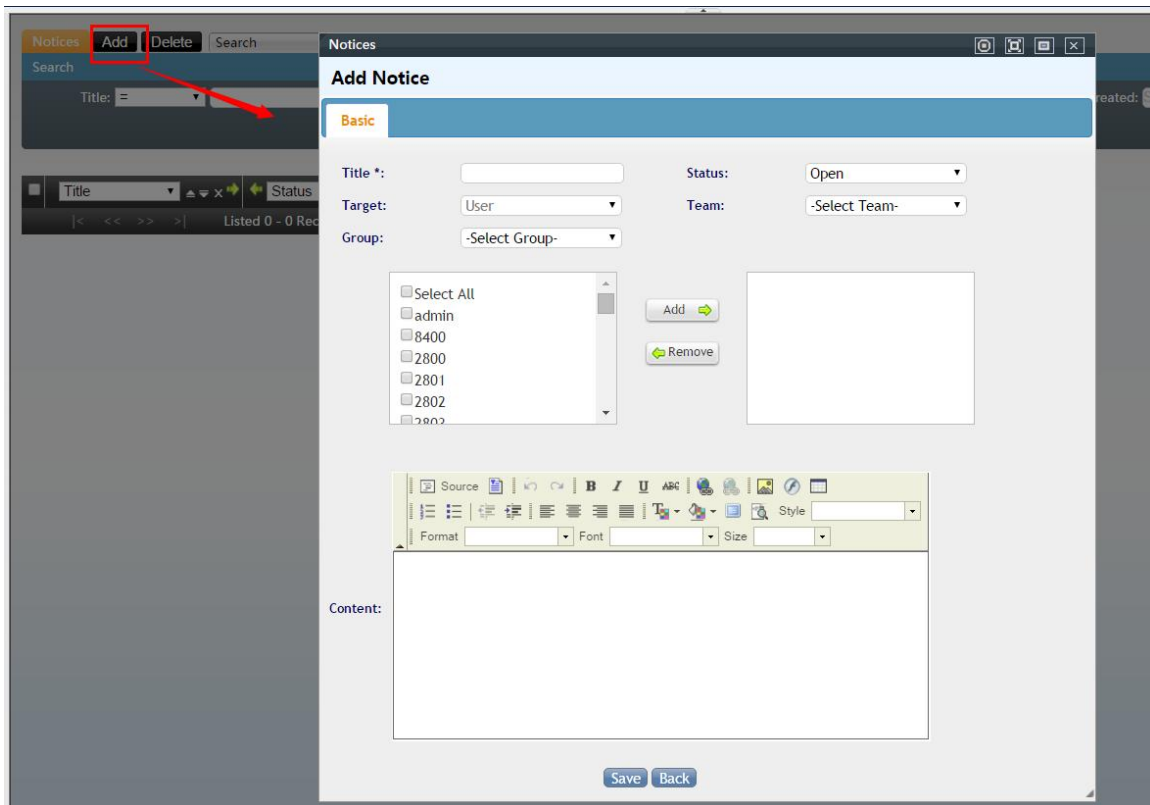
12.10 Notice

On the left menu, please go to **[Message]** -> **[Notices]** to open the page.



Module function: to release notices (automatically generate html page) and can define the range of visibility to accounts.

Add



Title: The title of the notice

Status: the status of the notice, including open, stick, disable; can also be seen as the level of the notice.

Disable: nobody can read the notice

Open, anyone within the range can see this notice; notices of this status are listed reverse chronologically.

Stick, the notice will always show up at top, if you have more than one stuck notice, it will sort by publish date

Target, Team, Group: for selecting the accounts that can see the notice in the system.

Choose team only and no group means the whole team can see this notice.

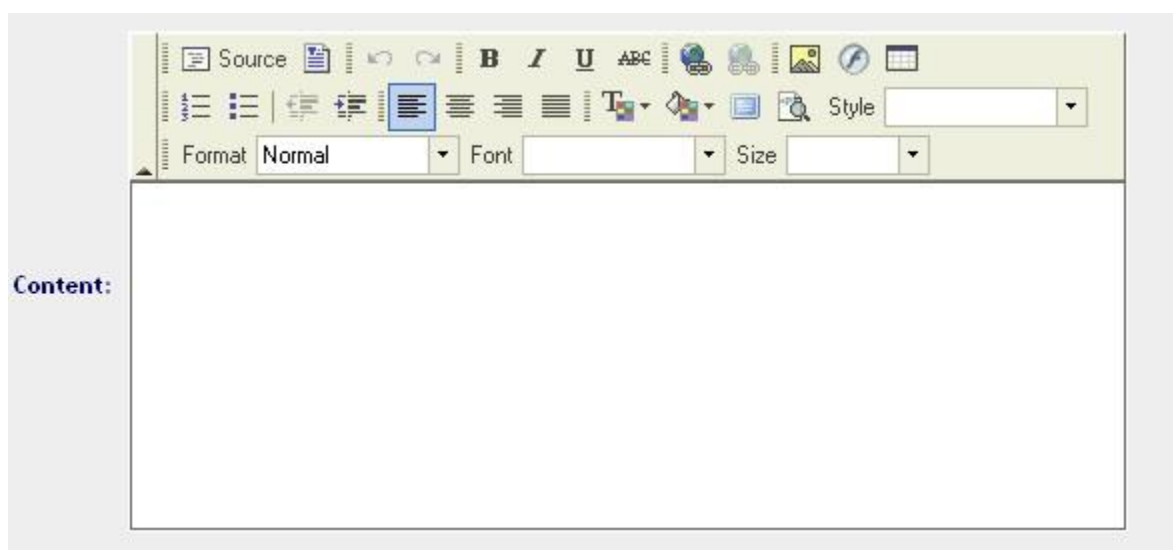
Choose a team and a group and no account means the whole group can see this notice.

No team and group has been chosen means all accounts in the system can see this notice.

Drag the accounts on the left to the right to give them the permission to the notice.



html editor is used for writing notices. The system will help you generate the html page.



The effect when you edit is the effect will be shown on the web page.

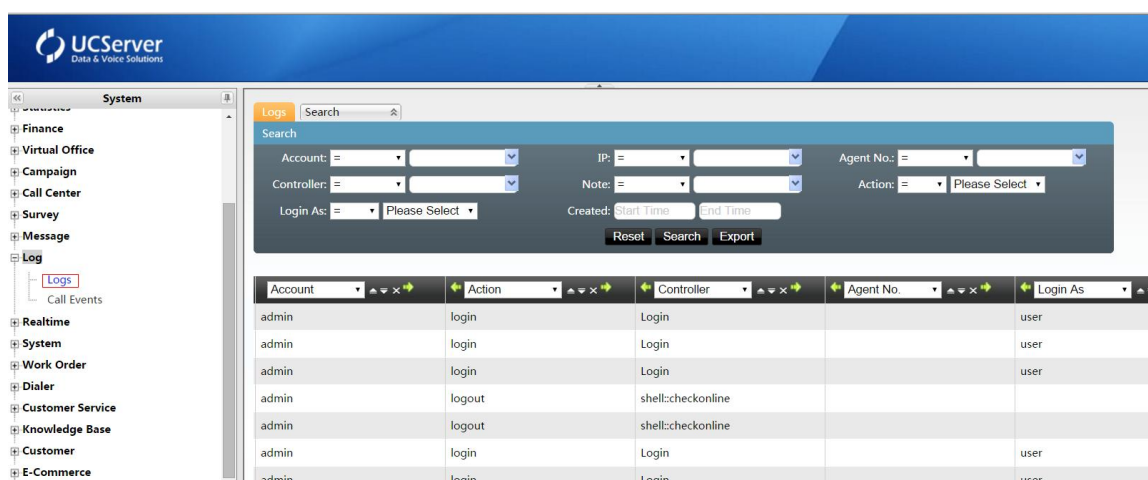
When the notice is released or stick, the system will push messages to the responding accounts that new notices have come out.



13 Log

13.1 Logs

On the left menu, please go to[Log]-> [Logs] to open the page.



Function : Save the account,agent's action operate and page's operate.

Account : account's username;

Action : the operate,include `login`,`add`,`update`,`delete`,`adduser`,`logout`

Controller : Which page the operate came from.

Agent No. : The agent number;

Login As : Login type;

IP : Where the account login.

Note : details of the operate;

Created : when the operate occurred;

13.2 Call Events

On the left menu, please go to[Log]-> [Logs] to open the page.

Agent No.	Active Num.	Source	Event	Uniqueid
2876	2876	CONVERSATION	Hangup	0
2876	2876	AGENT	Hangup	848
2876	4001005678	CALLEE	Hangup	849
2876	4001005678	CALLEE	Ringin	849
2876	2876	AGENT	Answer	848
2876	2876	AGENT	Ringin	848

Module Function: It is for checking the event log of agent work. The main events contain:

(ring, pick up, hang up, conference, incoming call, call pause, call resume, check in, check out, pause, cancel pause, init,close AWC, ring AWC, answer AWC, start AWC, end AWC, screen lock, close screen lock, call in only, call out only, , start,end,input,fail etc.)。

Team, group, agent no.: To identify the event belongs to which agent under which team and group.

Active Num.: To show the source number of this call, the agent number or the customer number.

Source: The source of this event (caller,callee, agent, consulting party,call finish, dialer, voice service)

Event: to show what events happened (ring, pick up, hang up, conference, incoming call, call pause, call resume, check in, check out, pause, cancel pause, init,close AWC, ring AWC, answer AWC, start AWC, end AWC, screen lock, close screen lock, call in only, call out only, , start,end,input,fail etc.) 。

Unique id: to show the ip the agent uses when performs this act.

Description: to give reasons for the log off/check out (normal check out, forced check out due to time out or system background operation)

Created: The time the log has been created

Example: A check out log like this one below

2018	2018	AGENT	Logoff	192.168.1.197
------	------	-------	--------	---------------

Agent 2018 performed a normal check out, the ip is 192.168.1.197

Example: a call log like this one below

2018	5001	CALLER	Incoming	33
------	------	--------	----------	----

At XXX (time), customer whose phone number is 5001 called in and it rang agent 2018.

14 Realtime

14.1 Agents

On the left menu, please go to **[Realtime]** -> **[Agent]** to open the page.

Agent No.	Active Num.	Source	Event	Uniqueid
end	18056582666	CONVERSATION	Hangup	0
2201	2201	AGENT	Logoff	192.168.111.217
2876	2876	CONVERSATION	Hangup	0
2876	2876	AGENT	Hangup	826
2876	4001005678	CALLEE	Hangup	827
2876	4001005678	CALLEE	Ringing	827
2876	2876	AGENT	Answer	826
2876	2876	AGENT	Ringing	826
0	18056582666	IVR	end	3
0	18056582666	IVR	input	3

Module Function: show the online agents and their working status;

Agent No: Agent number;

Active No.: The active NO.;

Source: The status of the agents;

Event: How many inbound calls the agent has answered;

Uniqueid:

Additional:

Team: team the agent belongs to;

Group:

Created: time when the agent logs in; ;

Sessionid

Calltype:

Model type:

Event Url

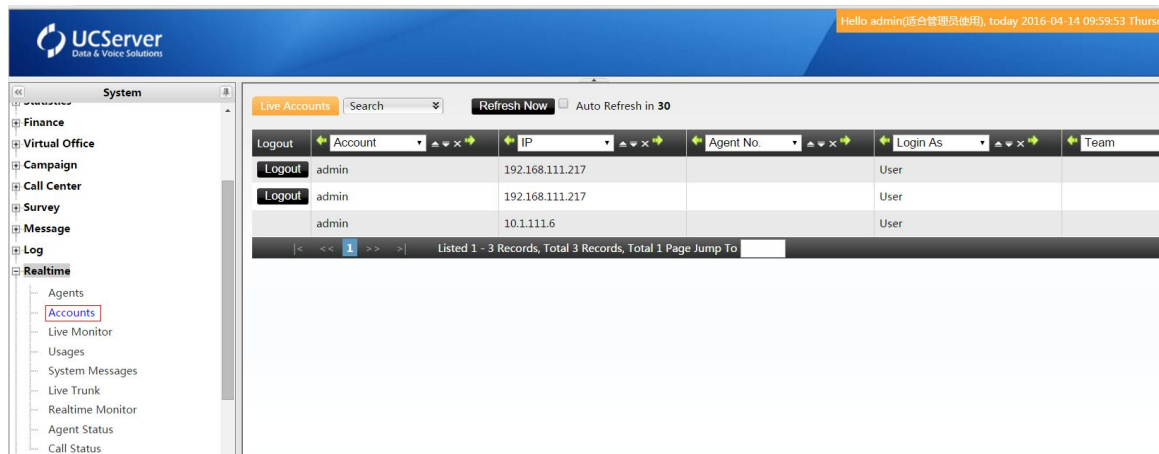
Pause Reason:

In this page, if you click ☐ Auto Refresh in 30, then it will refresh the page every 30 sec . Or you can click **refresh now** to get the newly refreshed information of accounts on line.

14.2 Accounts

On the left menu, please go to **[Realtime]** -> **[Accounts]** to open the page.

You can see the accounts information logged on. Before every piece of information (except for this account), there is a logout button which can be clicked to kick the account out of the system.



Module Function: to show the accounts on line;

Account: the account of the user;

IP: the IP where the account logs in the system;

Login as: the type of the accounts in the system;

Team: which team the account belongs to;

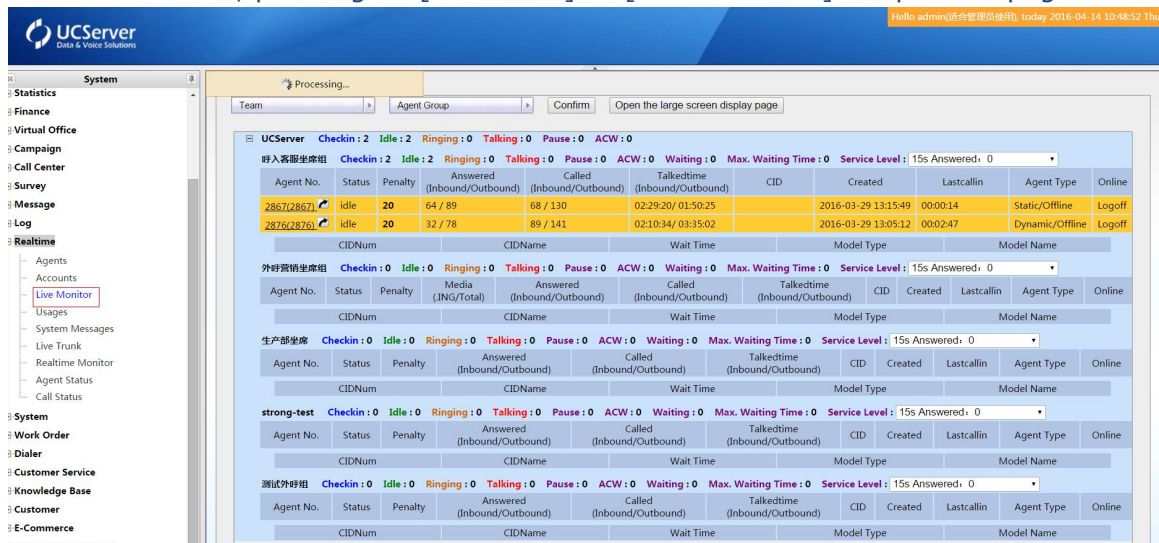
Group: which group the account belongs to;

Created: when the account logs in;

In this page, if you click ☐ **Auto Refresh in 30**, then it will refresh the page every 30 sec. Or you can click **refresh now** to get the newly refreshed information of accounts on line.

14.3 Live Monitor

On the left menu, please go to **[Realtime]** -> **[Live Monitor]** to open the page.



Module Function: To show the realtime agents' calling info.

Team&Agent Group: To select a team and a agent group,then press Confirm, the page will show this agent group's info. If not select, the page will show all agent groups' info.
The team's total agents' realtime info:Chekin,Idle,Ringing,Talking,Pause,ACW

UCServer	Checkin : 2	Idle : 2	Ringing : 0	Talking : 0	Pause : 0	ACW : 0
----------	-------------	----------	-------------	-------------	-----------	---------

The agent's realtime info: Chekin,Idle,Ringing,Talking,Pause,ACW

strong-test

Checkin : 0

Idle : 0

Ringing : 0

Talking : 0

Pause : 0

ACW : 0




Waiting : 0

Max. Waiting Time : 0

Service Level : 15s Answered : 0

Agent No.	Status	Penalty	Answered (Inbound/Outbound)	Called (Inbound/Outbound)	Talkedtime (Inbound/Outbound)	CID	Created	Lastcallin	Agent Type	Online
	CIDNum		CIDName	Wait Time		Model Type			Model Name	

If the agent is in the call, the bar will turn to red, and show the CID number.

呼入客服坐席组												Checkin : 2	Idle : 1	Ringing : 0	Talking : 1	Pause : 0	ACW : 0	Waiting : 0	Max. Waiting Time : 0	Service Level :	15s Answered : 0	
Agent No.	Status	Penalty	Answered (Inbound/Outbound)		Called (Inbound/Outbound)		Talkedtime (Inbound/Outbound)		CID	Created	Lastcallin	Agent Type	Online									
2867(2867)	 busy	20	66 / 89		70 / 130		02:30:21 / 01:50:25		 15002100458	2016-03-29 13:15:49	00:23:42	Static/Offline	Logoff									
2876(2876)	 idle	20	32 / 78		89 / 141		02:10:34 / 03:35:02			2016-03-29 13:05:12	00:43:30	Dynamic/Offline	Logoff									
CIDNum			CIDName			Wait Time			Model Type			Model Name										

Agent No.: the agent NO.;

Status: The status of this agent(Idle,busy,ringing,consulting etc.)

Penalty: The penalty of this agent.The smaller the penalty, the more possibility it will get the incoming calls. You can double click the penalty to edit it.

Answered: How many calls the agent answered;

Called: How many calls the agent made;

Talked Time: How much talked time this agent has;

CID: The customer's phone number;

Created: The agent login time;


Last Callin: How long from the last callin;

Agent Type: "/"Whether the agent is static or dynamic, offline or online;

Online: Whether the agent is login or logoff;

14.4 Usages

On the left menu, please go to[**Realtime**]-> [**Usages**] to open the page.



System Usage


Agent Used/Max. : 50 / 100

Device Used/Max. : 223

queue Used/Max. : 13

Account Use/Max. : 197

Conference Use/Max. : 5 / Unlimited



Team Name: UCSERVER

Agent Used/Max. : 21 / 21

Device Used/Max. : 177 / 200

queue Used/Max. : 7 / 5


Account Use/Max. : 144 / 200

Conference Use/Max. : 5 / 5

Company Addr. :

Admin Phone :

Admin Email :



Team Name: 李文娟

Agent Used/Max. : 0 / 0

Device Used/Max. : 2 / 5

queue Used/Max. : 0 / 5

Account Use/Max. : 1 / 5

Conference Use/Max. : 0 / 5

Company Addr. :

Admin Phone :

Admin Email :

Module Function: It shows the teams' usages in current system.

14.5 System Message

On the left menu, please go to[Realtime]-> [System Message] to open the page.

Processing...

System Message

Customer Name:	上海海品信息科技有限公司	Product Serial:	cc2014052700074081	Vendor:	ucserver.org
Max. Agents:	100	Max. Dialer Concurrent Calls:	400	Max. IVR Concurrent:	400
Fax Channels:	2	Max. WeiXin:	2	Current Version:	core-2.4-rc2
Expire Date:	No Expiration	Download Identity:	Download Identity	Upload License:	Upload License
Server Time:	2016-04-14 10:08:01				

System Process

Core:	Normal	Restart	CTI:	Normal	Restart
Server Restart:	Restart		Server Shutdown:	Shutdown	

System Usage

Num. of Agents:	50	Num. of Queues:	13	Num. of Devices:	223	Num. of Teams:	8
-----------------	----	-----------------	----	------------------	-----	----------------	---

Host Information			Network Usage			
Canonical Hostname	UCServer-CC1		Device	Received	Sent	Err/Drop
Listening IP	192.168.111.253		lo	37.88 GB	37.88 GB	0/0
Kernel Version	2.6.18-371.1.2.el5 (SMP)		eth0	251.90 GB	11.92 GB	0/0
Distro Name	CentOS release 5.10 (Final)					
Uptime	20 days 20 hours 33 minutes					
Current Users	1					
Load Averages	0.00 0.00 0.00					

Mounted Filesystems

Mount	Type	Partition	Percent Capacity	Free	Used	Size
/monitor	cifs	//192.168.111.4/monitor	11% (1%)	2999.08 GB	380.44 GB	3379.52 GB
/boot	ext3	/dev/sda1	4% (5%)	343.44 MB	16.54 MB	379.58 MB
/	ext4	/dev/sda3	60%	10.14 GB	17.91 GB	29.64 GB
/dev/shm	tmpfs	tmpfs	0% (1%)	1.93 GB	0.00 KB	1.93 GB
Totals :			12%	3011.49 GB	398.36 GB	3411.45 GB

System message

Customer name: the name of this authorised user

Max agents: the authorised max number of agents

Max dialer concurrent calls: the max concurrent calls of the authorised dialer

Vendor: the software releaser

expire date: the expire date of the authorisation

Server time: the server time

Download identity: download identity

upload licence: upload licence for authentication

System process

Core: the status of the core. you can reboot by clicking the button behind.

CTI: the current CTI status. you can reboot CTI by clicking the button behind.



Click the field behind CTI and see the status of each process. There is restart button and running link. See the picture below.

CTI:	Normal	
CTI Core	Running	Restart
realtime	Running	Restart
dialer	Running	Restart
datamover	Running	Restart
autodialer	Running	Restart
0.00 KB		

Server Restart: restart the server

Server Shutdown: shut down the server

System usage

num of agents: How many agents the system has now.

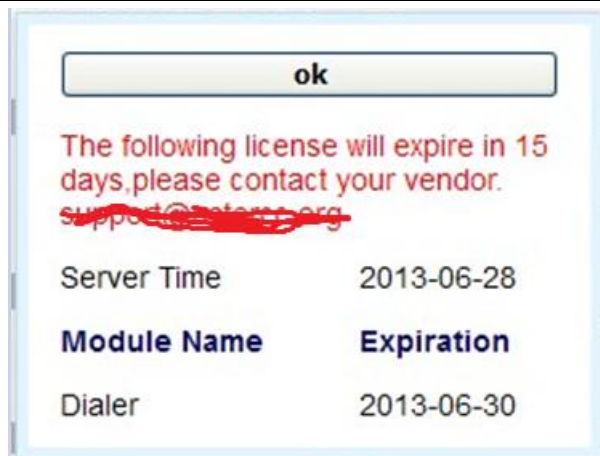
num of queues: How many queues the system has now.

num of devices: How many devices the system has now.

num of teams: How many teams the system has now.

System Module Expire Promot

If the module will be expired in 15 days, it will promote on this page, like this:



the following are all the information about the server where the software is

Host Information				Network Usage		
Canonical Hostname	UCServer-CC1	Device	lo	Received	Sent	Err/Drop
Listening IP	192.168.111.253	eth0		37.88 GB	37.88 GB	0/0
Kernel Version	2.6.18-371.1.2.el5 (SMP)			251.90 GB	11.92 GB	0/0
Distro Name	CentOS release 5.10 (Final)					
Uptime	20 days 20 hours 33 minutes					
Current Users	1					
Load Averages	0.00 0.00 0.00					

Mounted Filesystems						
Mount	Type	Partition	Percent Capacity	Free	Used	Size
/monitor	cifs	//192.168.111.4/monitor	11% (1%)	2999.08 GB	380.44 GB	3379.52 GB
/boot	ext3	/dev/sda1	4% (5%)	343.44 MB	16.54 MB	379.58 MB
/	ext4	/dev/sda3	60%	10.14 GB	17.91 GB	29.64 GB
/dev/shm	tmpfs	tmpfs	0% (1%)	1.93 GB	0.00 KB	1.93 GB
Totals :				12%	3011.49 GB	398.36 GB
					3411.45 GB	

14.6 Live Trunk

On the left menu, please go to **[Realtime]** -> **[Live Trunk]** to open the page.

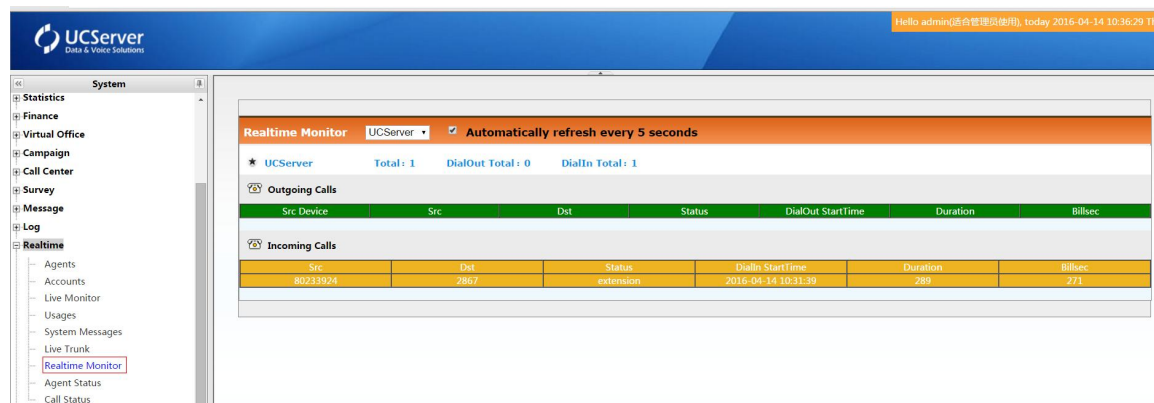


On the page, it will automatically refresh every 5 seconds (If do not need, please cancel the checkbox's checked status), show the calls on the trunk

This page shows the dailin details and dialout details by team.

14.7 Realtime Monitor

On the left menu, please go to[Realtime]→ [Realtime Monitor] to open the page.



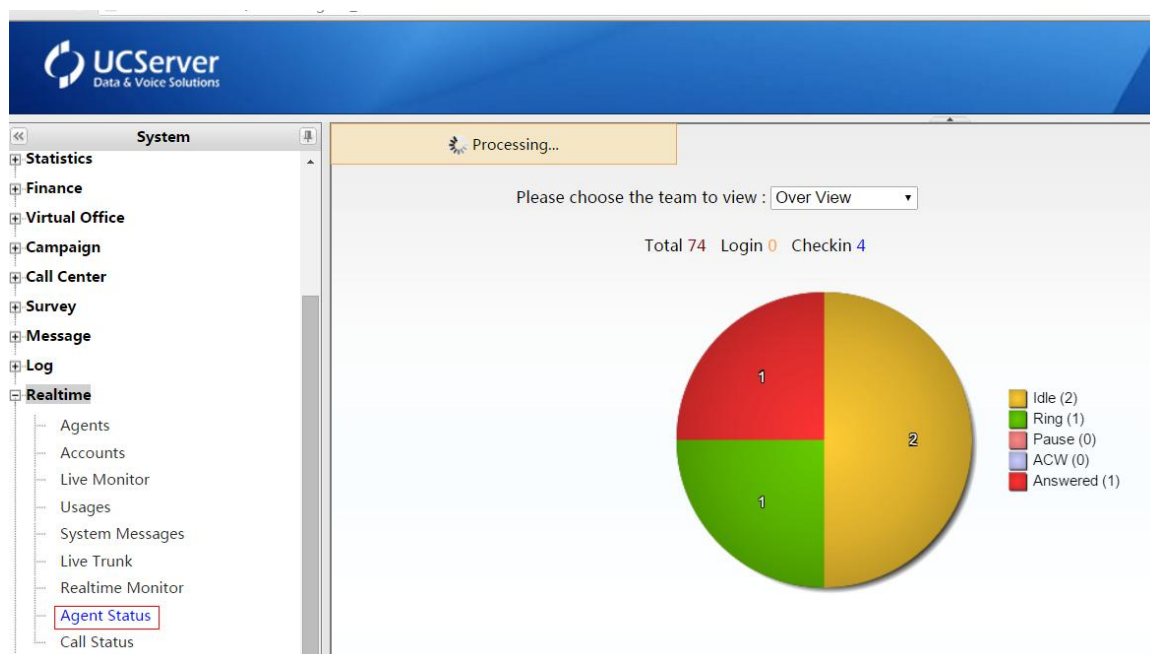
Module Function: show the realtime calling statues of a team.

On the page,it will automatically refresh every 5 seconds(If do not need,please cancel the checkbox's checked status).

This page shows the outgoing calls details and incoming details by team, please select the team from the drop box.

14.8 Agent Status

On the left menu, please go to[Realtime]→ [Agent Status] to open the page.

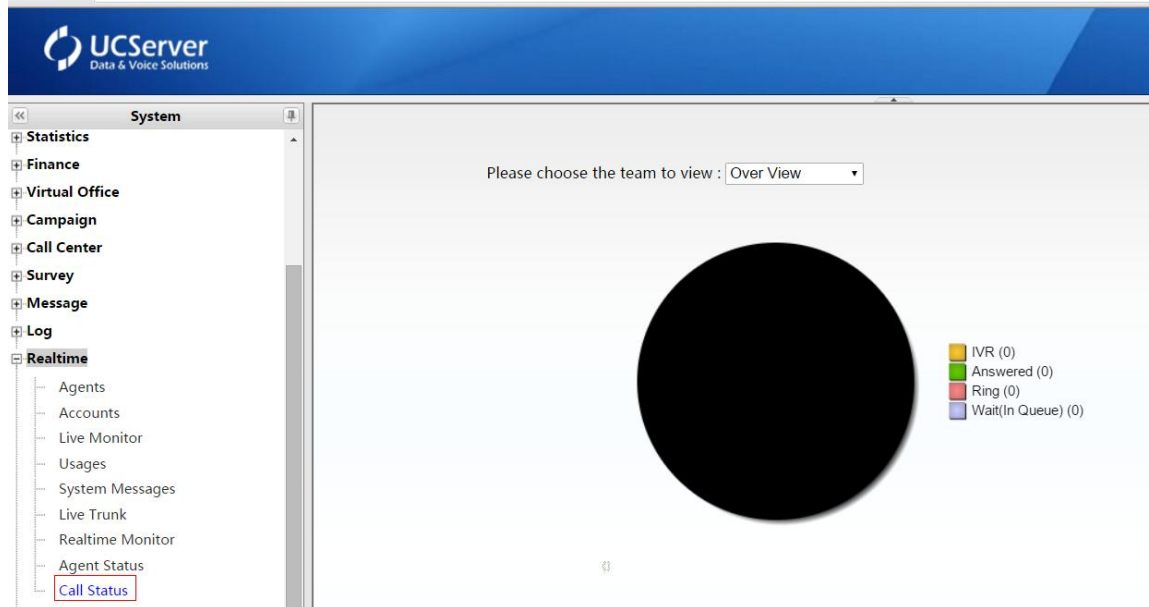


Module Function: show the realtime agent status.

Please select a team firstly, then it will show the Idle,Ring,Pause,ACW,Answered status of this agent team.

14.9 Call Status

On the left menu, please go to **[Realtime]** -> **[Call Status]** to open the page.

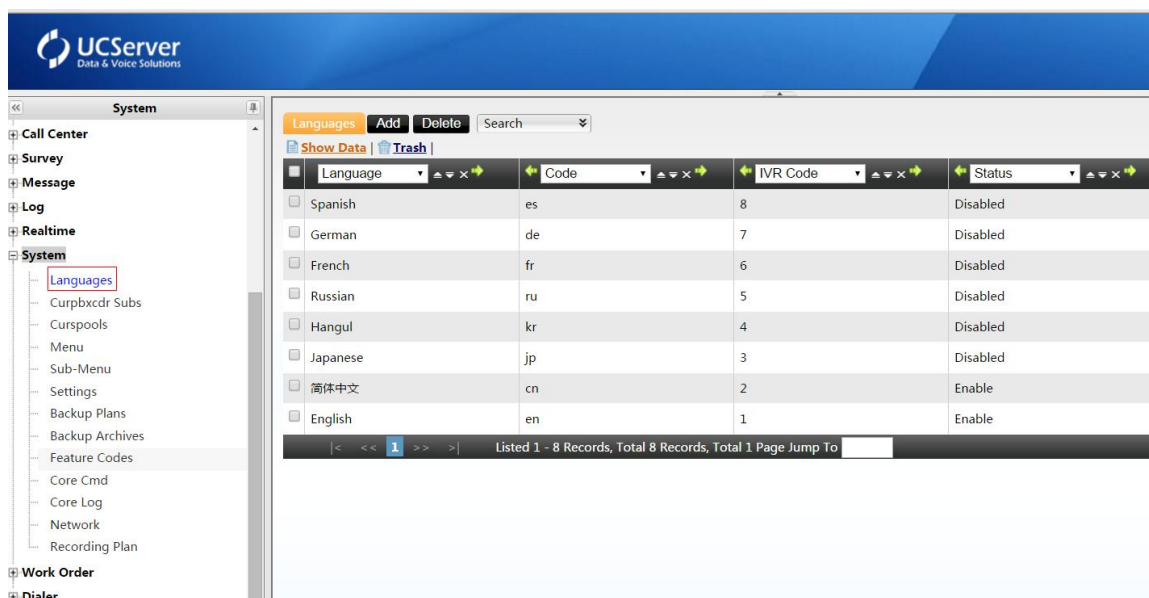


Please select a team firstly, then it will show the IVR, Ring, Answered, Wait(In Queue) status of this team.

15 System

15.1 Language

On the left menu, please go to **[System]** -> **[Languages]** to open the page.



Module Function: This module take care of system language,IVR language,customer data language, email template language etc.

There are eight default languages in the system, please do not modified it, or the system will be unnormal;

Language: The language

Code: The code for language;

IVR Code: The ivr code, please don't modified it once set, or the IVR will go wrong.

Status: Whether the language is enable or disable;

Note: Give a note to this language;

15.2 Curpbx cdr Subs

On the left menu, please go to[**System**]-> [**Curpbx cdr Subs**] to open the page.

ID	Calldate	Answertime	Endtime	CID
78	2013-06-20 16:05:30	2013-06-20 16:05:36	0000-00-00 00:00:00	5001
77	2013-06-20 16:05:29	2013-06-20 16:05:36	0000-00-00 00:00:00	5001

Module Function: 这 This is a temporary table,which record the calls' realtime data.Duo to unextected reason, the call signal will be abnormal, which causes error on the data in this table.The agnts' work will be affected, to ensure the progress of the agent work, you can delete the data in this table.Before delete, please confirm the agents has been idle for more than 1 min.

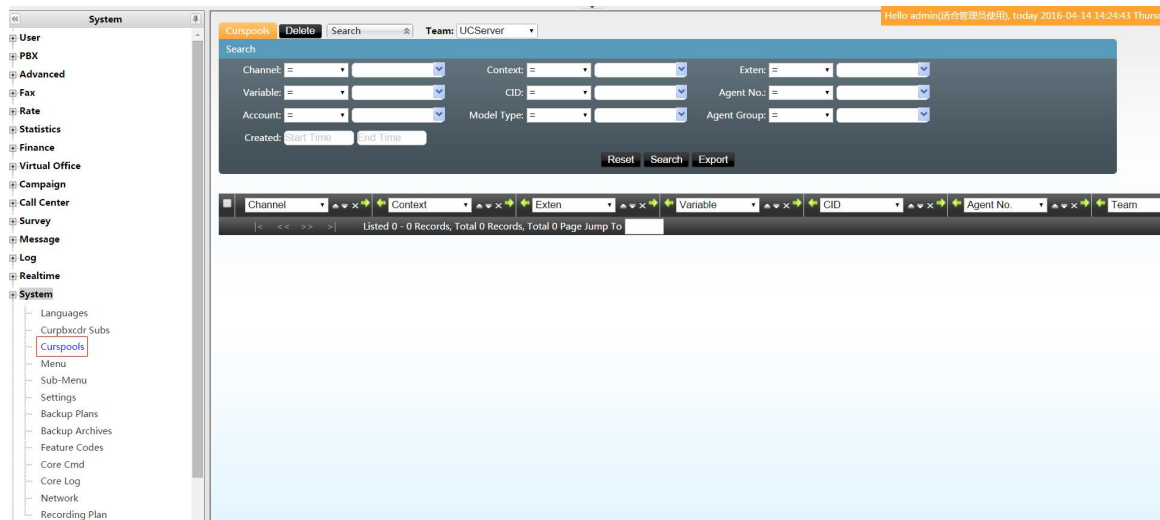
The agents can delet these data in their working platform, but the privilege requires.

Only agents and agent administrator with privilege can delete these data.

In the background, only team administrators and system administrator have the privilege.

15.3 Curspools

On the left menu, please go to[**System**]-> [**Curspools**] to open the page.



Module Function: When the lines have problem or system down, the numbers waiting for dialing out will remain in the predial list and not been clear timely.

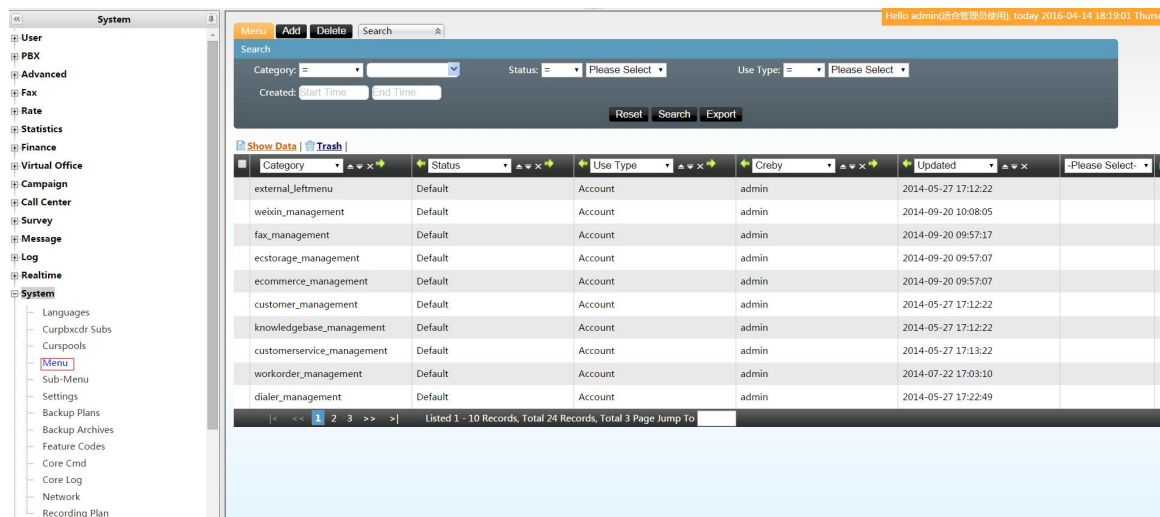
If the agents calls out, the system will give the prompt“please don’t dail repeatedly “.The administrator has to enter this page to delete the wrong data.

Before deleting the data, please comfirm:

- 1.The created time is longer than 1 min;
- 2.The agent has not had conversation with this customer.

15.4 Menu

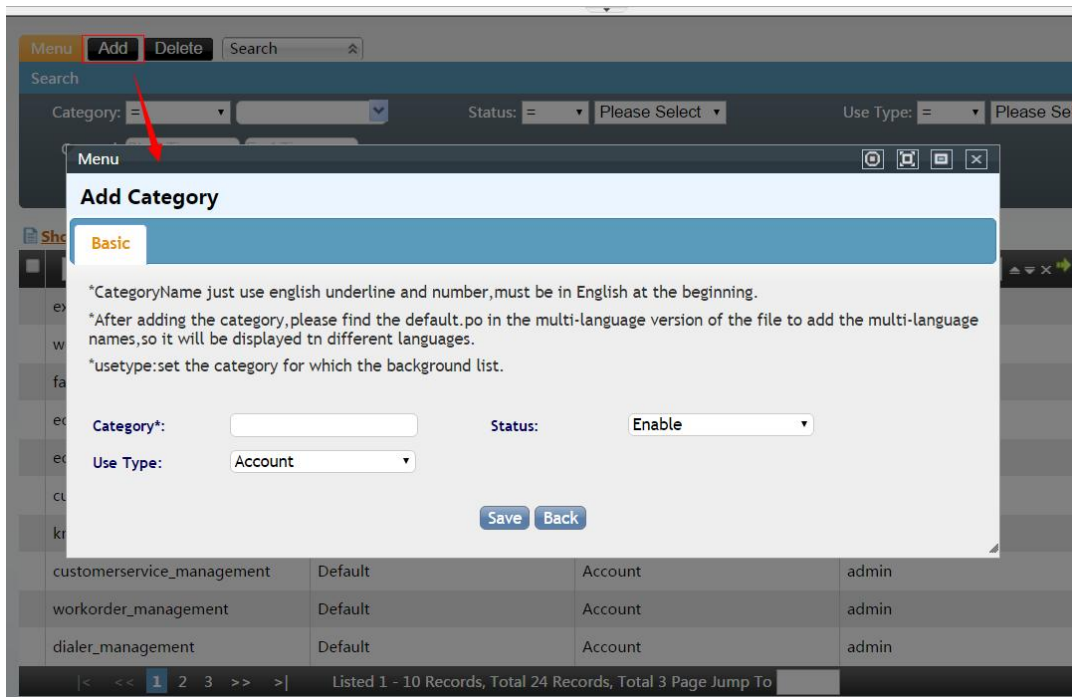
On the left menu, please go to[**System**]-> [**Menu**] to open the page.



Module Function: To save and reorder the system catagories.

Add

Click [Add] to open the menu add page.



*CategoryName just use english underline and number,must be in English at the beginning.

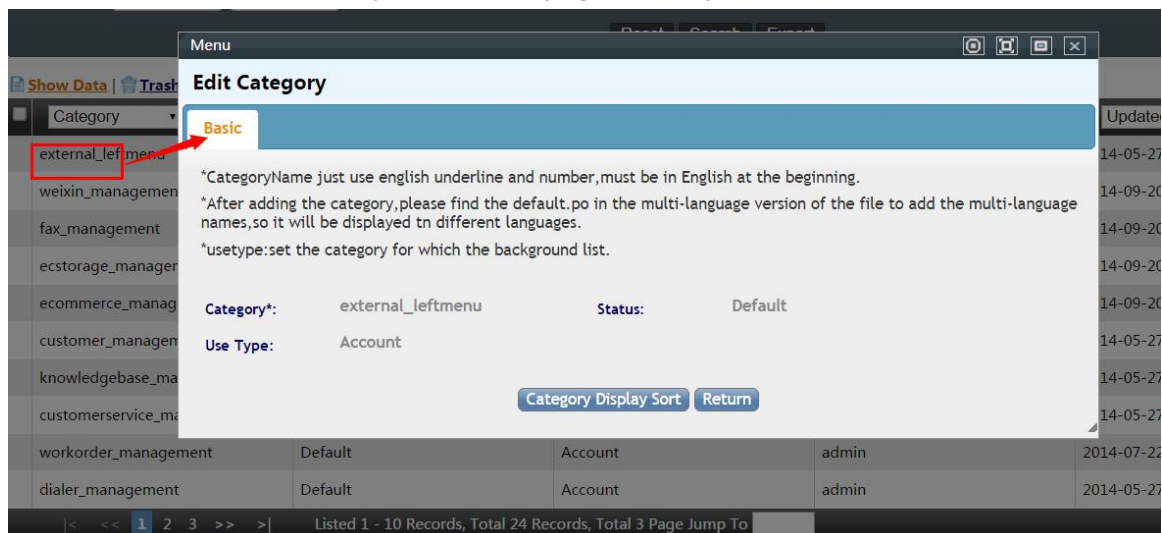
*After adding the category,please find the default.po in the multi-language version of the file to add the multi-language names,so it will be displayed tn different languages.

*usetype:set the category for which the background list.

After finished the data,you can click the [Save] button to save the data.Then you can see the data shown in the list.

Edit

Double click the data,can open the edit page,then update the data.



The gray field is uneditable while the black field is editable.

Click 【Category Display Sort】 to open the bellow page:

1.	User (user_management)
2.	PBX (pbx_management)
3.	Advanced (pbxadvanced_management)
4.	Fax (fax_management)
5.	Rate (rate_management)
6.	Statistics (statement_statistics)
7.	Finance (adjustment_statistics)
8.	Virtual Office (callcenter_virtualcustomer)
9.	Campaign (callcenter_outbound)
10.	Call Center (callcenter_advanced)
11.	Survey (survey_management)

You can swift these orders by draft the items. Click [Save Current Order](#) button after finishing.

When fresh the system, you will see it has list the catagory by your new settings.

15.5 Sub-Menu

On the left menu, please go to[**System**]-> [**Sub-Menu**] to open the page.

Sub-Menu Add Delete Search

Search Controller: Category: Status: Please Select
Used for agent: Please Select Used for account: Please Select Created: Start Time End Time
Reset Search Export

Show Data Trash

Controller	Category ID	Use Type	Creby	Updated	Please Select
area_reports	statement_statistics	Default	admin	2016-02-01 12:28:55	
dialer_noanswercases	dialer_management	Default	admin	2016-02-01 12:26:10	
call_status	systemrealtime_management	Default	admin	2014-11-03 08:30:30	
wx_menus	weixin_management	Default	admin	2014-09-20 10:12:03	
wx_accounts	weixin_management	Default	admin	2014-09-20 10:08:05	
faxsends	fax_management	Default	admin	2014-09-20 09:57:17	
faxlogs	fax_management	Default	admin	2014-09-20 09:57:17	
faxdevices	fax_management	Default	admin	2014-09-20 09:57:17	
ecfinancial_logs	ecstorage_management	Default	admin	2014-09-20 09:57:07	
ecfinancial_inputs	ecstorage_management	Default	admin	2014-09-20 09:57:07	

Listed 1 - 10 Records, Total 180 Records, Total 18 Page Jump To

Module Function: To save and reorder the sub-menu catagories.

Add

Click [Add] to open the sub-menu add page.

Sub-Menu Add Delete Search

Search

Sub-Menu

Add Leftmenu

Basic

*Page URL,if it is an external url,please fill in the whole url,if it is in the framwork,please fill in the controller name.

*Select a category, the module will appear under in this category.

*If it is a page in the Framwork,please check the following permissions page features, identify what actions can be done on this page.

*The system will automatically check the permissions for this page is generated sql statement, and added to the database. Otherwise you need to add to the database itself.

*The external page does not have this functions,according to yourself to make it.

☐ Add ☐ Delete ☐ Edit ☐ View ☐ Export

为以下角色添加权限:
Select Options

Controller: Category ID: user_management

Status: Enable Display: Background: ☐ Portal: ☐

Save Back

*Page URL,if it is an external url,please fill in the whole url,if it is in the framwork,please fill in the controller name.

*Select a category, the module will appear under in this category.

*If it is a page in the Framwork,please check the following permissions page features, identify what actions can be done on this page.

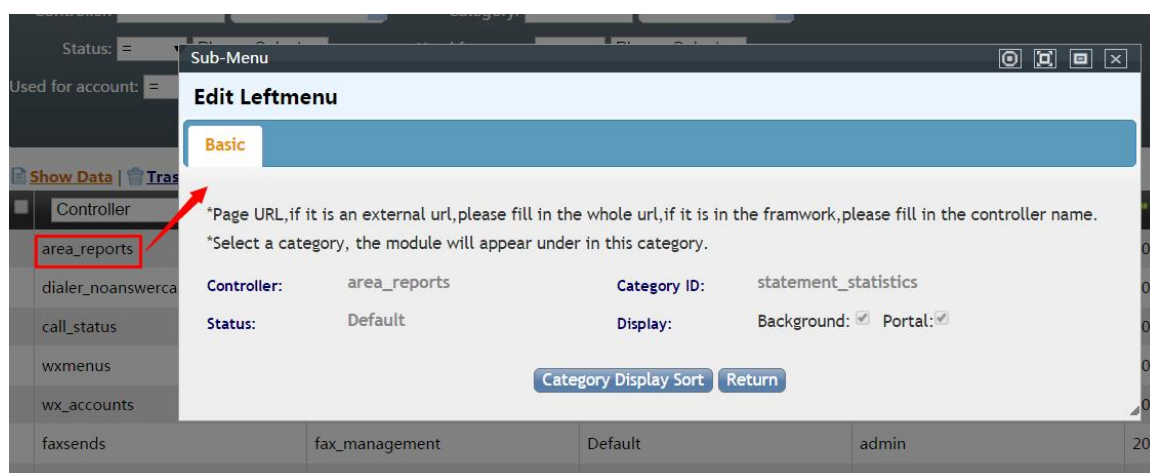
*The system will automatically check the permissions for this page is generated sql statement, and added to the database. Otherwise you need to add to the database itself.

*The external page does not have this functions,according to yourself to make it.

After finished the data,you can click the [Save] button to save the data.Then you can see the data shown in the list.

Edit

Double click the data,can open the edit page,then update the data.



The gray field is uneditable while the black field is editable.
Click **Category Display Sort** to open the bellow page:



You can swift these orders by draft the items. Click **Save Current Order** button after finishing.

When fresh the system, you will see it has list the catagory by your new settings.

15.6 Settings

On the left menu, please go to **[System]** -> **[Settings]** to open the page.

Business Parameter Settings

System Settings

BUSINESS PARAMETER SETTINGS		
<div> <div>BILL SETTINGS</div> <div>GENERAL SIP SETTINGS</div> <div>LARGEDATA PROCESS</div> <div>SYSTEM SETTINGS</div> </div>		
<div> <div>ADVANCED SETTINGS SYSTEM</div> <div>SERVER TIME AND TIME ZONE</div> </div>		
Max. SMS Number:	12	The max. amount of SMS sent to each person by system each day
Max. Email Number:	12	The max. amount of email sent to each person by system each day

Max.SMS Number: The max number of SMS sends to the same phone numbers daily.

Max Email Number: The max number of emails sends to the same email address daily.

Eg, If the quantity of SMS sendings to xxxxx today is more than current set value, the system will prompt the excess part is failed to send.

Bill Settings

System Settings		
<div> <div>BUSINESS PARAMETER SETTINGS</div> <div>BILL SETTINGS</div> <div>GENERAL SIP SETTINGS</div> <div>LARGEDATA PROCESS</div> <div>SYSTEM SETTINGS</div> <div>ADVANCED</div> </div>		
<div> <div>SETTINGS SYSTEM</div> <div>SERVER TIME AND TIME ZONE</div> </div>		
Billing Status:	enable	If we want to enable billing features.
statement date:	1	Billing cycle.
payment_due_date:	10	Due Date.
Interest(%):	0	Monthly interest.

Bill Status:Whether to enable the billing features;

Statement data: The billing cycle(eg: if sets 1, then the billing is from 1st of last month to 1st this month;0 means the end of every month.)

Payment due data:The payment due date of every month. If you do not pay the money before this date, the system will calculate the interest at the beginning of this date.。

Interest(%): Monthly interest;

General SIP Settings

System Settings

BUSINESS PARAMETER SETTINGS	BILL SETTINGS	GENERAL SIP SETTINGS	LARGEDATA PROCESS	SYSTEM SETTINGS	ADVANCED
SETTINGS SYSTEM	SERVER TIME AND TIME ZONE				
allowguest:	No	allowguest			
tos_sip:	cs3	tos_sip			
tos_audio:	ef	tos_audio			
tos_video:	af41	tos_video			
trustrpid:	No	trustrpid			
sendrpid:	No	sendrpid			
videosupport:	Yes	videosupport			
externip:	180.175.179.249	externip			
externhost:	180.175.179.249	externhost			
externrefresh:	60	externrefresh			
localnet:	192.168.0.0/16,172.0.0.0/8,10.0.0.0/8	localnet			
realm:	ucserver-cc	realm			
bindport:	5060	bindport			
bindaddr:	0.0.0.0	bindaddr			

allowguest**tos_sip****tos_audio****tos_video****trustrpid****sendrpid****videosupport****externip****externhost****externrefresh****localnet****realm****bindport****bindaddr****rtpkeepalive****rtptimeout****useragent****srvlookup**

Large Data Process

System Settings

BUSINESS PARAMETER SETTINGS	BILL SETTINGS	GENERAL SIP SETTINGS	LARGEDATA PROCESS	SYSTEM SETTINGS	ADVANCED
SETTINGS SYSTEM	SERVER TIME AND TIME ZONE				
Current PbxCdr Table Data	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 90	The pbxcdr table data retention time(day).The data which exceeds that time will be saved into history tables.			
History PbxCdr Table Data	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 6	The history of pbxcdr table data retention time(month).The data which exceeds that time will be deleted.			
WorkOrder RetentionTime	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 3	The recent fixed of work order retention time(month).			
Team ContactLog RetentionTime	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 90	The team contact log retention time(day).			
E-commerce data RetentionTime	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 90	The recent E-commerce data retention time(day).			
StatisticData RetentionTime	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 180	The statistic data retention time(day).The data which exceeds that time will be deleted.			
SystemLog RetentionTime	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 90	The system log retention time(day).The data which exceeds that time will be deleted.			
CallEventLog RetentionTime	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 30	The call event log retention time(day).The data which exceeds that time will be deleted.			
Campaign ContactLog RetentionTime	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 90	The campaign contact log retention time(day).The data which exceeds that time will be saved into history tables.			
TripData RetentionTime	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 7	The trip data retention time(day).The data which exceeds that time will be deleted.			
Message RetentionTime	MONTH:ALLWEEK:ALLDAY:ALLHOUR:1MINUTE:0 7	The message table data retention time(day).			

Current PbxCdr Table Data: The pbxcdr table data retention time(day).The data which exceeds that time will be saved into history tables.

History PbxCdr Table Data: The history of pbxcdr table data retention time(month),The data which exceeds that time will be deleted.

WorkOrder RetentionTime: The recent fixed of work order retention time(month).

Team ContactLog RetentionTime: The team contact log retention time(day).

E-commerce data RetentionTime: The recent E-commerce data retention time(day).

StatisticData RetentionTime: The statistic data retention time(day),The data which exceeds that time will be deleted.

SystemLog RetentionTime: The system log retention time(day),The data which exceeds that time will be deleted.

CallEventLog RetentionTime: The call event log retention time(day),The data which exceeds that time will be deleted.

Campaign ContactLog RetentionTime: The campaign contact log retention time(day).The data which exceeds that time will be saved into history tables.

TripData RetentionTime: The trip data retention time(day),The data which exceeds that time will be deleted.

Message RetentionTime: The message table data retention time(day).

System Settings

System Settings

BUSINESS PARAMETER SETTINGS	BILL SETTINGS	GENERAL SIP SETTINGS	LARGEDATA PROCESS	SYSTEM SETTINGS	ADVANCED
SETTINGS SYSTEM	SERVER TIME AND TIME ZONE				
Search area:	Display	Default search area hide or display!(display/hide)			
Page Limit:	10	the num of data per page			
Google map	No	Whether to enable the GoogleMap			
ticket other tip	No	When publishing tasks, whether to increase a reminder way, used to notify the other party. (no/email/Inside information)			
Login Type:	account type	Login Type			
login restrict:	Yes	Whether to allow the same account, login from different client at the same time?(yes/no)			
Soundfile Path:	../data/soundfiles/	The path of the system to put soundfiles for FTP			
use other account device:	Yes	To allow use of other account device			
Format:	HH:MM:SS	How to display the seconds in the system			
Monetary Unit	CNY	-			
default export format	xls	-			
Export Data Paging:	500000	The max number of data rows each export file			
export time limit:	0	export time limit			
Export file encoding:	UTF-8	The character encoding the export file(UTF-8 or ANSI).			
Remind Panel Work Way:	Popup Window	Agent platform to remind the way(PopWindow or FlashingButton).			
Display Agent DebugMenu:	Yes	Display agent the debug menu			

Search area: Default search area hide or display!(display/hide)

Page Limit: the num of data per page

Google map: Whether to enable the GoogleMap

ticket other tip: When publishing tasks, whether to increase a reminder way, used to notify the other party.(no/email/Inside information)

Login Type: Login Type

login restrict: Whether to allow the same account, login from different client at the same time?(yes/no)

Soundfile Path: The path of the system to put soundfiles for FTP

use other account device: To allow use of other account device

Format: How to display the seconds in the system

Monetary Unit

default export format

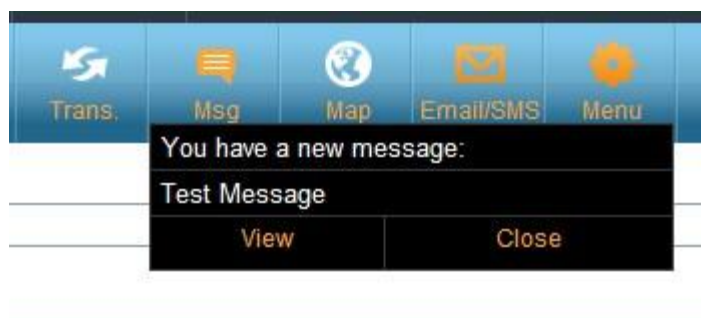
Export Data Paging: The max number of data rows each export file

export time limit: export time limit

Export file encoding: The character encoding the export file(UTF-8 or ANSI).

Remind Panel Work Way: Agent platform to remind the way(PopWindow or FlashingButton).

- Pop window : If set pop window, when new message comes, the agent will see bellow page:



- Flash button : If set flash button, when new message comes, the agent will see



Advanced Settings System

System Settings		
BUSINESS PARAMETER SETTINGS	BILL SETTINGS	GENERAL SIP SETTINGS
LARGEDATA PROCESS	SYSTEM SETTINGS	ADVANCED
SETTINGS SYSTEM	SERVER TIME AND TIME ZONE	
user domain	Doubleclick to edit	User login of domain name ,so that the same browser open simultaneously agent interface and user interface.
agent domain	Doubleclick to edit	Agent login of domain name ,so that the same browser open simultaneously agent interface and user interface.
IP AccessLimit	Doubleclick to edit	Access limit, each row save a IP segment, only IP section IP can access system.exp: 192.168.1.1-100 192.168.1.190-198
Login Route	enable	Login Route
HTTP Push Link	http://127.0.0.1/agentindesks/pushagent	HTTP Push Link
Secury Password	disabled	Enable the web security password.
license to	admin	-
System Language	Chinese	-
Announce Language	简体中文	-
dial method	processdial	Dial method.
Restart services in scheduler	MONTH:All WEEK:All DAY:All HOUR:3 enable	-
Default Team	Doubleclick to edit	Default team
Monitor WebDownload	Yes	Whether to allow to use web to download monitor files
Compress Recording	Yes	Whether Compress Recording.
Auto Download UpgradePack	Yes	Every night to automatically download upgrade pack.
Auto Add DID	Yes	Whether to open auto add the did function.
Trunk Error Duration	0	When use the trunk to dial,if the duration less than this setting value,it will be considered to occur a error

user domain: User login of domain name ,so that the same browser open simultaneously agent interface and user interface.

agent domain: Agent login of domain name ,so that the same browser open simultaneously agent interface and user interface.



You can set an account domain and a agent domain, if this way you can login the system background with these two different domain in the same browser.

IP AccessLimit: Access limit, each row save a IP segment, only IP section IP can access system.exp:

192.168.1.1-100

192.168.1.190-198

Login Route: Login Route

HTTP Push Link: HTTP Push Link

Security Password: Enable the web security password.

license to: Whom to give the license to

System Language: The default system login language

Announce Language: The default announce language
dial method

Restart services in scheduler: Whether to enable system restart automatically or not, when to restart the system;

Default Team: Default team

Monitor WebDownload: Whether to allow to use web to download monitor files

Compress Recording: Whether Compress Recording.

Auto Download UpgradePack: Every night to automatically download upgrade pack.

Auto Add DID: Whether to open auto add the did function.

Trunk Error Duration: When use the trunk to dial, if the duration less than this setting value, it will be considered to occur a error

System Time and Time Zone

System Settings

BUSINESS PARAMETER SETTINGS
BILL SETTINGS
GENERAL SIP SETTINGS
LARGEDATA PROCESS
SYSTEM SETTINGS
ADVANCED

SETTINGS SYSTEM
SERVER TIME AND TIME ZONE

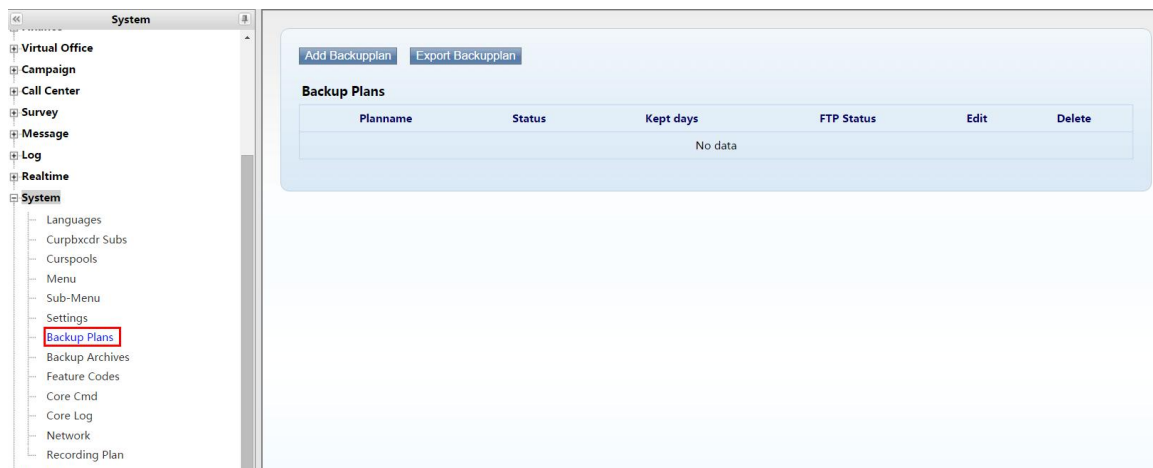
Time Synchronization	pool.ntp.org	Immediate	Time synchronization
Server Time	2016-04-15 10:13:06 Asia/Chongqing		Note: this modification is successful, the system will automatically restart the database. In order to avoid data loss, please make this parameter in unmanned work modification.

Time Synchronization: Time synchronization

Server Time: The current server time

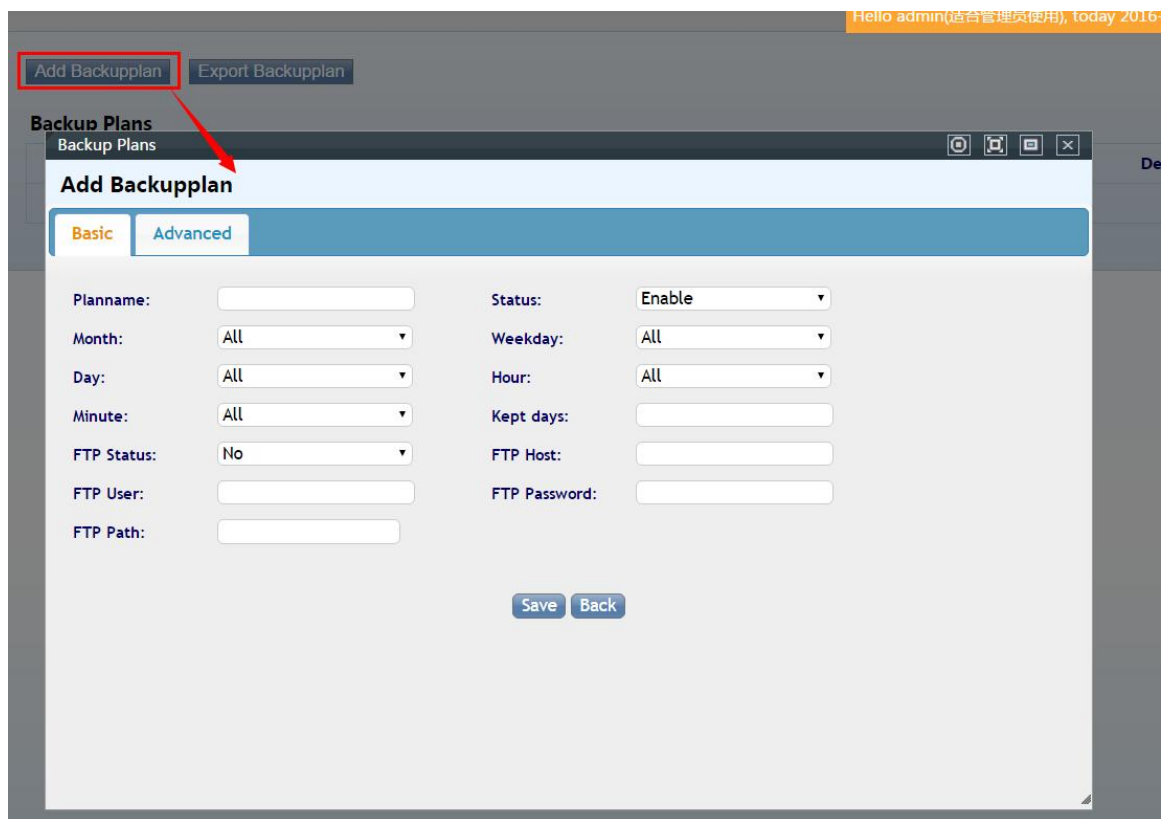
15.7 Backup Plans

On the left menu, please go to **[System]** -> **[Backup Plans]** to open the page.



Module function: To make a backup of system file and database. It supports make a backup file ftp to other server.

Add Backup Plan



Plan Name: Name the aims or content of this plan;

Status: Whether to enable this plan or not;

How to set the plan running time?

- Month: Which month to run the backup, all means every month;
- Weekday: Which weekday to run the backup, all means a whole week;
- Day: Which day to run the backup, all means every day in a month;
- Hour: What hour time to run the backup, all means every hour in a day;

- **Min:** What min time to run the backup, all means every min in a hour;

Eg1: Run at 0:00 every day

Month=All, Weekday=All, Day=All, Hour=0, Min=0

Eg 2: Run at 2:00 every Sunday

Month=All, Weekday=All, Day=All, Hour=2, Min=0

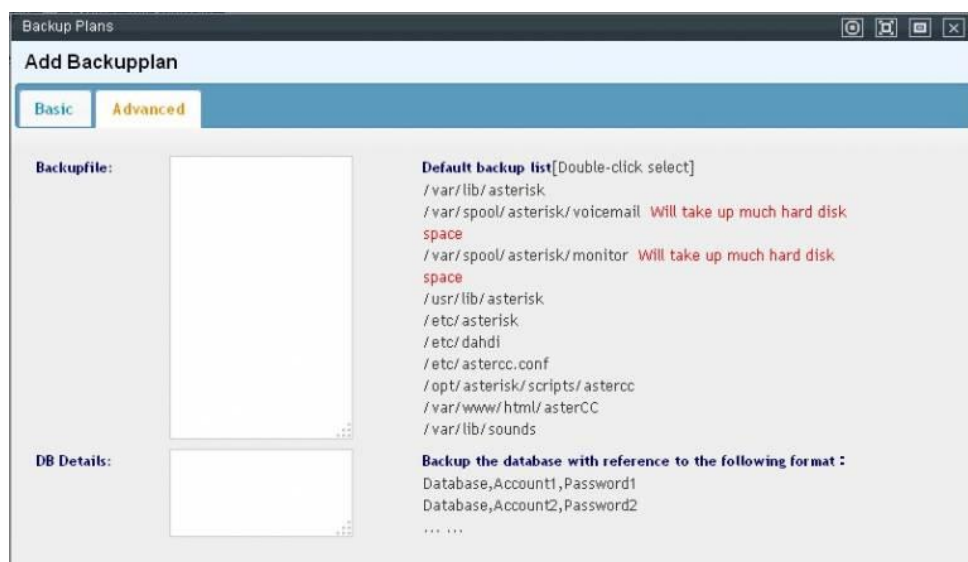
Kept Days: How many days to keep this backup file in the server.

As the system disk space is limited, it is recommended to backup files for 3-7 days. The extended files will be deleted directly by the system.

How to ftp backup file to other server?

- **FTP Status:** Whether to use ftp to back file to other server
- **FTP Host:** The host server IP: eg 192.168.1.88
- **FTP User:** The Host server login user name
- **FTP Password:** The Host server login password
- **FTP Path:** The backup file saving path

The local backup file still there if enable ftp backup.



Backupfile: It list the key system file path, please double click it to add to the Backupfile box.

DB Details: Write in line, one line is a database. On the right with the format reference.

15.8 Backup Archives

On the left menu, please go to **[System]** -> **[Backup Archives]** to open the page.

System

Virtual Office

Campaign

Call Center

Survey

Message

Log

Realtime

System

Languages

Curpbxcdr Subs

Curspools

Menu

Sub-Menu

Settings

Backup Plans

Backup Archives

Feature Codes

Core Cmd

Core Log

Network

Recording Plan

Database backup

Filename	Time	Download	View	Delete
tr.22.2016-04-05-14-55	2016-04-05 14:55	Download	View	Delete
backup.22.2016-03-23-14-30	2016-03-23 14:30	Download	View	Delete
backup.22.2016-03-22-14-30	2016-03-22 14:30	Download	View	Delete

< < 1 > >

Listed 1 - 3 Records, Total 3 Records, Total 1 Page Jump To

Module Function: To back up database,system config file, audio file regularly according to system config file parameter. To use backup file to recover system timely (Only the backup file with the same version of system can do the recovery)

Click **【Fresh】** button,the system will backup the file regularly according to your settings. You can delete,view,and download the backup file list on the page.Only when the backup file with the same version of system will the **【Recovery】** button clickable.)

Click **【Recovery】** , the system will ask you to select what to recover:database,Asterisk Config,audio file.

After the recovery, it will create a new database. If it requires privilege, please enter the administrator's database account and password.

When finish, the system will give a feedback on this recovery(success or fail).

Please relogin the system after recovery.



Please make sure no one is using the system before doing the recovery.

15.9 Feature Codes

On the left menu, please go to **[System]** -> **[Feature Codes]** to open the page.

Featurecode

SHORTCUT KEY HOT KEY Default ▾			
Parking Key:	700	Parking Key	enable
Pick Up:	*00	Pick Up	enable
My Extension:	*62	My Extension	enable
Recording:	*63	Recording	enable
Agent Login:	*64	Agent Login	enable
Agent Logoff:	*65	Agent Logoff	enable
Simulate Incoming Call:	*66	Simulate Incoming Call	enable
DND Activate:	*67	DND Activate	enable
DND Deactivate:	*68	DND Deactivate	enable
agent workway switch to normal mode:	*69	agent workway switch to normal mode	enable
agent workway switch to outbound mode:	*100	agent workway switch to outbound mode	disabled
agent workway switch to inbound mode:	*72	agent workway switch to inbound mode	enable
Play/CallBack last contacted number:	*73	Play/CallBack last contacted number	enable
Skip DNC:	*81	Skip DNC	enable
My Voicemail:	*97	Enter own voicemail memu	enable
Dial Voicemail:	*98	Enter voicemail memu by voicemail number	enable

【Shortcut Key】 To define the shortcut key for those extensions registered in this system.eg:

The*00 is the shortcut key for pick up,when press *00 on the phone's keypad, it will pick up the incoming call.

Please check the shortcut key name, keys and the explanation on this page.And you can change the shortcut keys' value if you like.Double click it to do the modification.

 ▾

if setting default, all teams will use the same shortcut keys.Or select a team to modify its shortcut keys.,

【HotKey】

SHORTCUT KEY HOT KEY Default ▾			
Blind Transfer:	*51	Blind Transfer	enable
Attended Transfer:	*52	Attended Transfer	enable
Consult To Agent:	*54	Consult To Agent	enable
Consult To Phone:	*55	Consult To Phone	enable

【Hot Key】 To define the hot key for ongoing calls.

Eg,during a call, enter the hotkey*51, the call will do blind transfer.

Please check the hot key name, keys explanation and status on this page.And you can change the shortcut keys' value if you like.Double click it to do the modification.

All the hot keys are the same for all teams defaultly.

If change **【Blind Transfer】** and **【Consult to Agent】** , you need to apply the changes.



featurecodes.conf has been changed, click to apply.

New featruecodes.conf file updates after you click the bar.

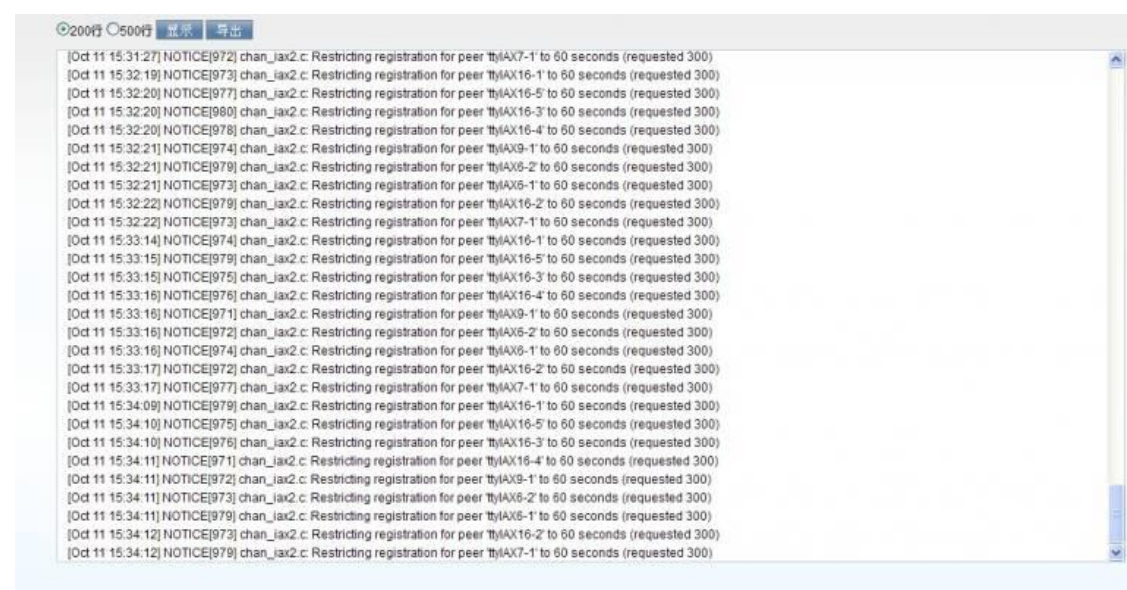
15.10 Core Cmd

If you know more about asterisk,you can execute the cmd on this page.

Execute it,will return the result.E.g.,execute "core show calls"



15.11 Core Log



On this page,you can use this page to view system kernel related log.

15.12 Network

Function: configure the system network

The screenshot shows the 'NETWORK' configuration page. It includes a 'NETWORKING' section with a table for 'HOSTNAME' and 'GATEWAY'. Below this is a 'DNS' section with an 'ADD' button and a table for 'DNS' entries. At the bottom is an 'ETH' section with a table for network interfaces.

NETWORKING	HOSTNAME	GATEWAY	EDIT
yes	astercc10dev.astercc	192.168.1.1	EDIT

DNS [ADD](#)

DNS	DELETE
8.8.8.8	DELETE

ETH

DEVICE	BOOTPROTO	IPADDR	NETMASK	GATEWAY	ADD	EDIT
eth0	none	192.168.1.1	255.255.255.0	192.168.1.1	ADD	EDIT
eth0.1	none	192.168.1.2	255.255.255.0	192.168.1.1		EDIT
eth0.10	none	192.168.1.10	255.255.255.0	192.168.1.1		EDIT
eth0.2	none	192.168.1.2	255.255.255.0	192.168.1.1		EDIT
eth0.3	none	192.168.1.3	255.255.255.0	192.168.1.1		EDIT
eth0.4	none	192.168.1.4	255.255.255.0	192.168.1.1		EDIT
eth0.5	none	192.168.1.5	255.255.255.0	192.168.1.1		EDIT
eth0.6	none	192.168.1.6	255.255.255.0	192.168.1.1		EDIT
eth0.7	none	192.168.1.7	255.255.255.0	192.168.1.1		EDIT
eth0.8	none	192.168.1.8	255.255.255.0	192.168.1.1		EDIT

NETWORK

Can edit the NETWORK's parameter

The screenshot shows the 'NETWORK' configuration page with an 'EDIT' button highlighted. A dialog box titled 'NETWORK' is open, showing the 'Basic' tab. The dialog box contains fields for 'NETWORKING *', 'HOSTNAME *', and 'GATEWAY *'. The 'Save' and 'Back' buttons are at the bottom of the dialog box.

NETWORKING	HOSTNAME	GATEWAY	EDIT
no	UCServer-CC1	192.168.111.1	EDIT

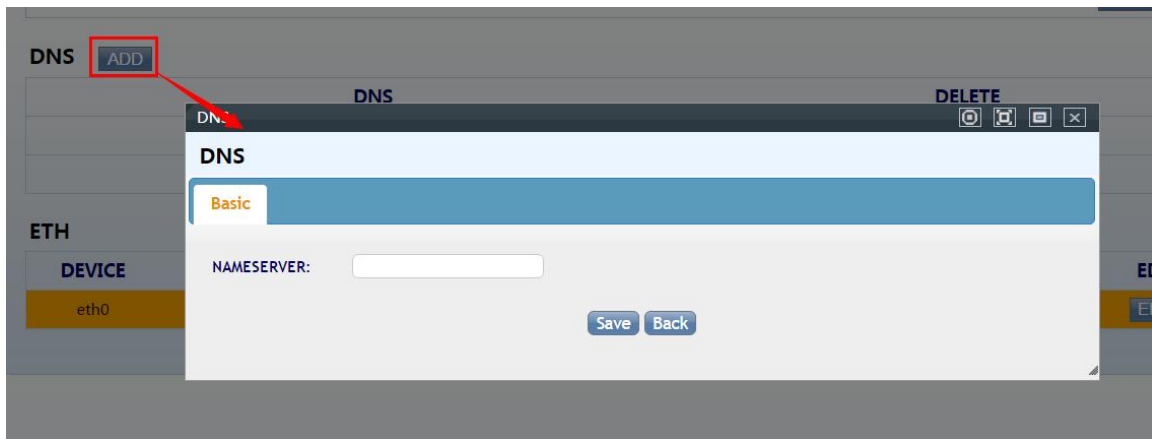
DNS [ADD](#)

ETH

DEVICE	BOOTPROTO	IPADDR	NETMASK	GATEWAY	ADD	EDIT
eth0	static	192.168.111.253	255.255.255.0		ADD	EDIT

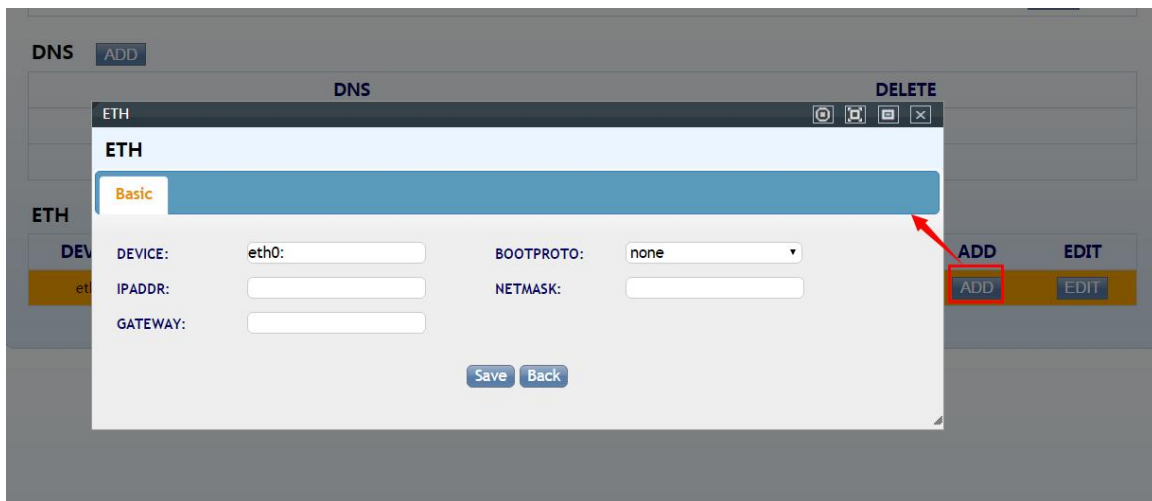
DNS

Click ADD button behind the DNS to add the DNS for system

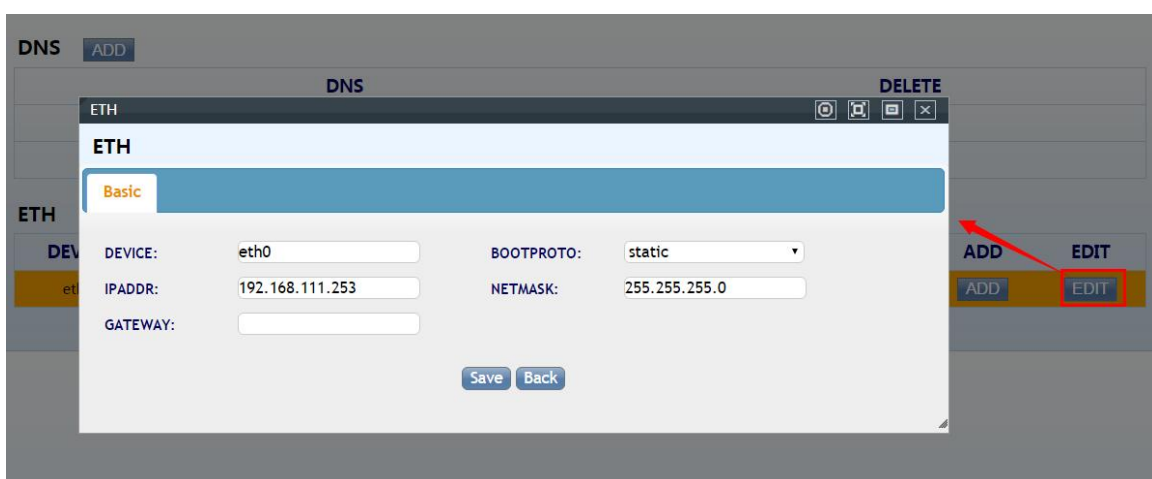


ETH

Add sub ETH for eth0

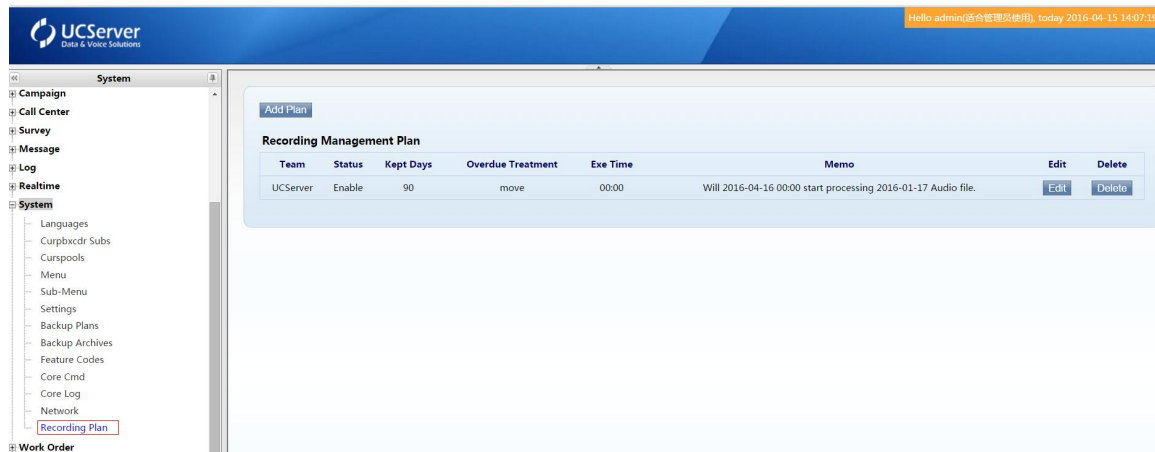


Can edit the ETH parameters



15.13 Recording Plan

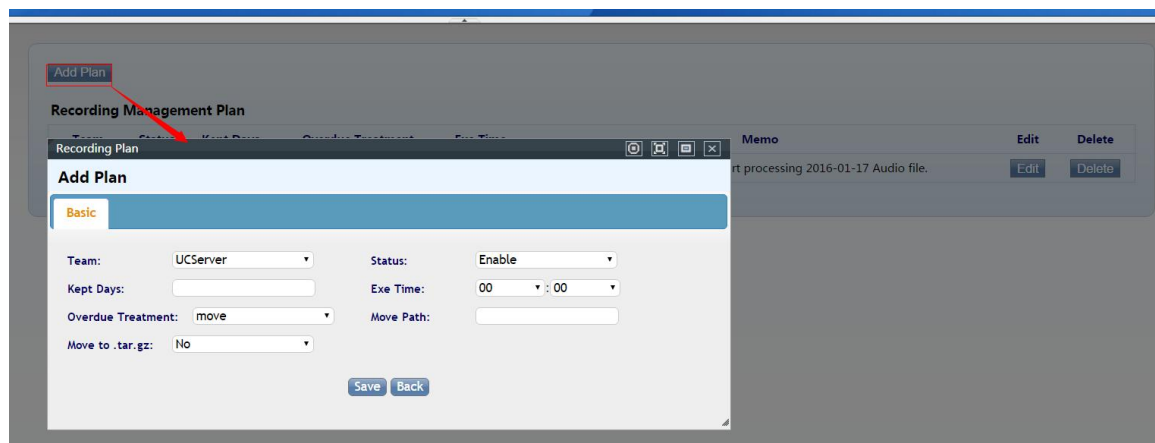
On the left menu, please go to **[System]** -> **[Recording Plan]** to open the page.



Due to the limited space of hard disk space, the system is unable to save a large number of recording files for a long time. So we need to set up a recording plan, the system backstage script will follow this plan to transfer the recording(to server or harddisk) or delete it.

Add

Click [Add] to open the plan add page.



Team: Set up this plan for whose recording file.If there are several teams' recording files require dealing with, then add a plan to each team.

The system only take care of one recording plan at a time, so please differentiate the execute time of every plan. It suggests at least have one hour difference.

Status: Only when enable will the plan be executed.

Kept Days: How many days to keep this recording file in the server.The extended files will be transferred or deleted directly by the system.

Eg, say if put 5, it is 11th April 2016 now, if enable this plan today, then on 16th April, the system will carry out this plan. (you will see on the Recording Management Plan, there is a memo "Will 2016-04-16 00:00 start processing 2016-01-17 Audio file..")

If this is the first time setting a plan, the recordings before 11th have to transfer or delete manually.

Exe Time: The executed time daily (At what time will the system deal with this team's recordingfile every day. Please set an idel time, like evening time.)

Overdue Treatment:

Move: move the recording file to a hard disk

Delete: delete the recording file

Move Path: The path for moving overdue recording file.

Move to tar.gz: Whether to compress the recording file to tar.gz format. It will save space if doing compress, but then you can not listen the recording file on line or download it.

16 Work Order

16.1 Work Order

Work order is a ticket system, working with campaign or customer service, it is used to control a work flow for customers. A work order is like a tracer, so all work on the work order could get recorded, archived and traced.

Work order could be used for e-commerce, customer service, education, sales, out sourcing etc.

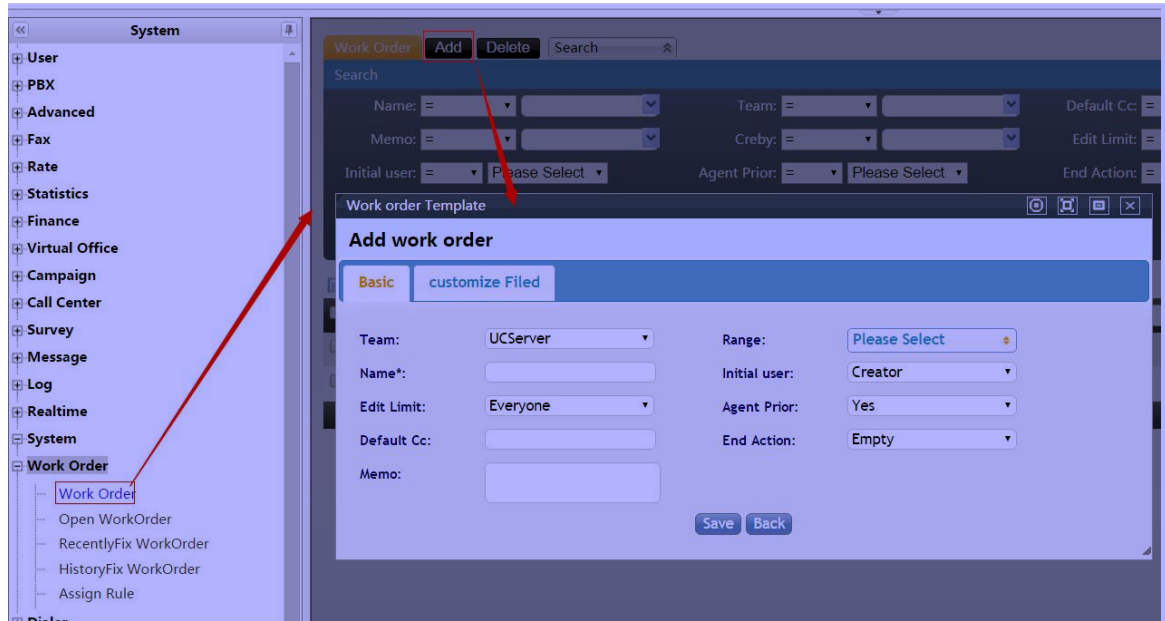
So how to create a work order? Let's start with a e-commerce company to show you how to use work order to manage the work.

1. agent in **Sales Group** get a call, customer want to place an order for some products, agent will create the orders and a work order, then forward the work order to **Finance Group**.
2. agent in **Finance Group** will check if all are correct in the order, waiting for the payment, and then forward the work order to **Warehouse Group**.
3. agent in **Warehouse Group** will do the products check list and finish the package, then forward the work order to **Logistics Group**.
4. agent in **Logistics Group** will send the package, trace the transport status, make sure customer receive the products, then forward the work order to the agent who created the work order
5. agent in **Sales Group** will do customer care, collect feed back and finally, close the work order

When any process goes wrong, it can be return to group supervisor or previous node(group)

Before start, we need to create a work order for this work flow, go to Work Order

Parameters



- **Team Name:** Define which team this work order belongs to
- **Range:** Define the agent groups which could process this work order (invalid if you configured work flow)
- **Name:** Put a name for this kind of work order, such as "Complain", "Sales"
- **Initial user:** When the work order is created, how it gets processed
- **Creator:** the owner is the agent when he creates it
- **Group:** the work order will go to agent group, group admin need to assign this work order or it will assign to some agent by assign_rule
- **Edit Limit:** Define who can modify the work order
- **Everyone:** the owner and group admin could change the content and status, the other agents who could see the work order, they can reply or change the content, but could not change status
- **Owner:** the owner and group admin could change the content and status, the other agents who could see the work order, for them work order is read-only.
- **Agent Priority:** Let's say currently the work order belongs to A in G2 (created by B in G1), when A finish his work, the work order is supposed to go to G3.
- **Yes:** when the work order goes to G3, it will first check if B the creator is in G3, if yes, the work order will go to B, if not, it will check if A is in G3, if not it will waiting for assignment by group admin
- **No:** work order will stay in G3, waiting for assignment by group admin
- **End Action:** The action when the work order is finished
- **Empty:** Do nothing
- **Create New:** Create a new work order for this customer if the work order is finished, this would give admin the option to make a work flow

- **Agent Decided:** The last agent/admin could decide if to create a new work order or just close this one.
- **Default CC:** When the work order status changed, it will send an email to the emails defined here, use semicolon (;) as separator if you have more than one.

Customization

We can define customized filed for a work order to meet some specific needs.

Work order Template

Add work order

Basic customize Filed

Language type: English Type: input

Identity *: Display As *: Add Field

Type	Identity	Display As	Language type	Selectoption	Select Can Enter	Delete

Save Back

- **Language:** For multiple language usage
- **Type:** The type of the field, includes "input" (input box), "select" (drop down menu), text(text area), upload(for attachment),date(for a date),datetime(for a date and time)
- **Identity:** Letters only, it will be used to create a database table
- **Display As:** The display name for the field
- **select Options:** Appear when the type is select, define the options for drop down menu, use comma to separate each option.
- **Select Can Enter:** Appear when the type is select, if agent is allowed to enter text which is not defined in the select options.

Work Flow

If you want to forward the work order to another group when it's finished in one group, you can define the work flow between agent groups here. Please double click the work flow just create.

Work order Template

Edit Work order

Basic customize Filed Auto Range

Process Group: Group1 Process Memo:

Add Auto Range

Sort	Order Number	Process Group	Process Memo	Delete
↓	1	Group1	The customer service personnel, to confirm the job content	Delete
↑ ↓	2	Group2	Financial audit, verification data correctness, confirmation of payment	Delete
↑ ↓	3	Group3	Warehouse picking packing	Delete
↑ ↓	4	Group4	Delivery logistics group, waiting for customers sign	Delete
↑	5	Group1	Back to the customer service, care visit	Delete

- As in the diagram, the work order will go from group1 to group5, and no matter which group creates the work order, it will always go to group1, then other groups according to priority.
- When it's done in group5, the work order status will become "Done" as we mentioned above, when you use work flow, the work range will be invalid

FAQ: How to use a work order?

- In VINA-PBX, there're two modules which could work with work order: Campaign and Customer Service.
- To use work order, you need to bind the work order with a call result

Campaign

- Campaigns
- Blacklists
- Customer Packages
- Data Logs
- Results
- CDRs
- Quality Control
- QC Scores
- Data Monitors

Customer Service

- Customer Service
- Call Results
- CDR
- Missed Calls
- Statistics

Team: [Select] Work order: Please Select

CustomerService: Please Select

Note:

Please Select

Shopping

Consult

Complain

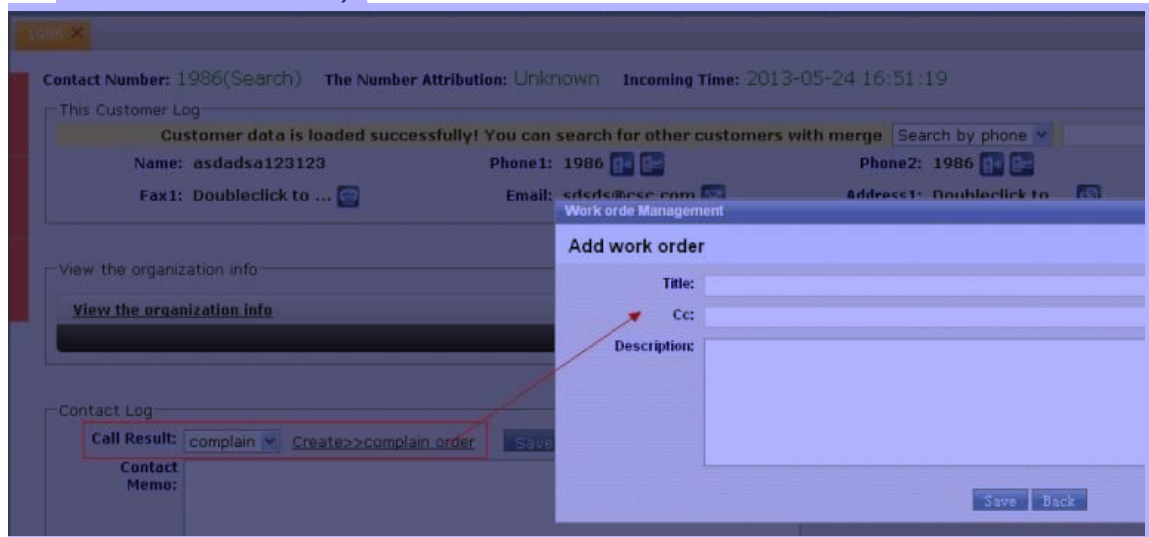
maintenance

- When work order is bind, when selecting the call result for a call, you will see the link to create a work order

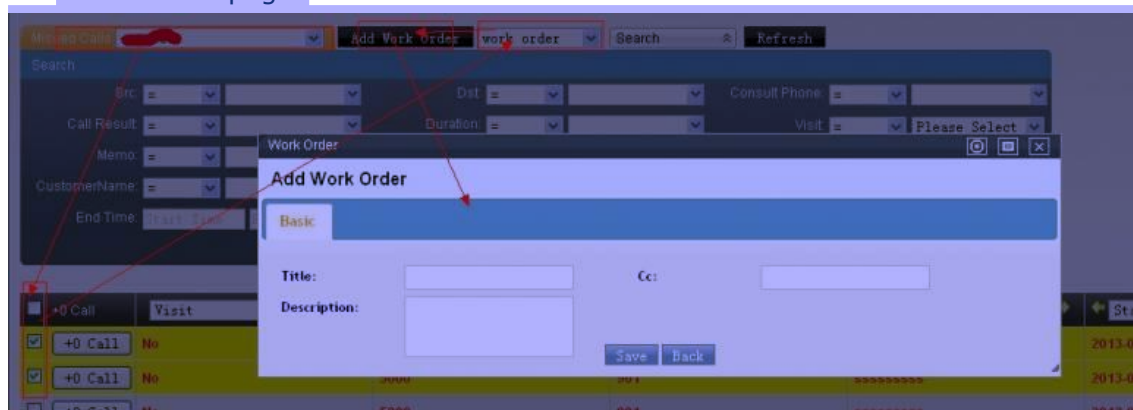
FAQ: Where I can create a new work order?

In VINA-PBX, we have 4 pages where you can create a new work order:

- Customer Service popup page (if it's bind to customer service call result and agent selects the call result)



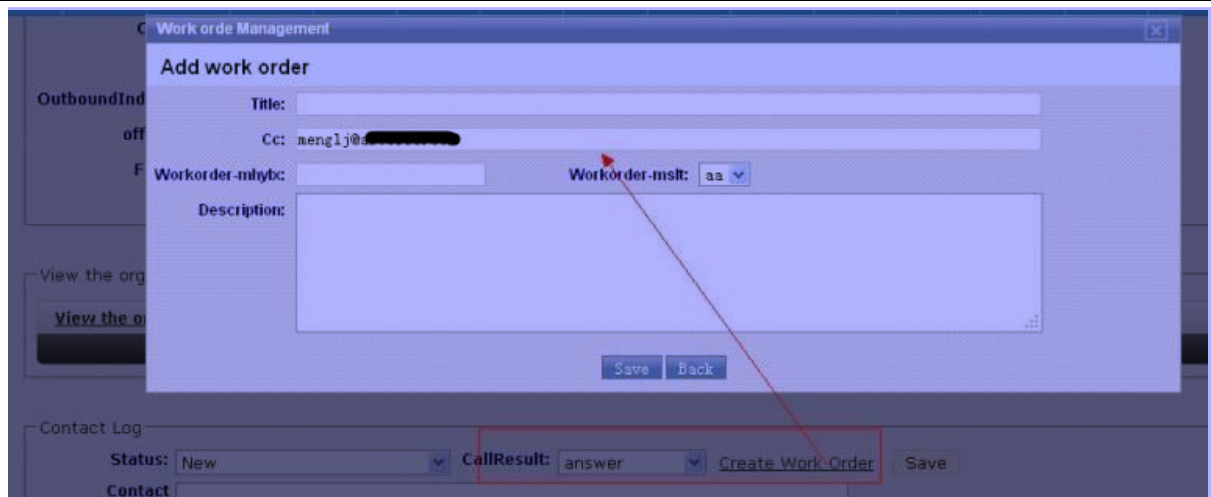
- Missed Calls page



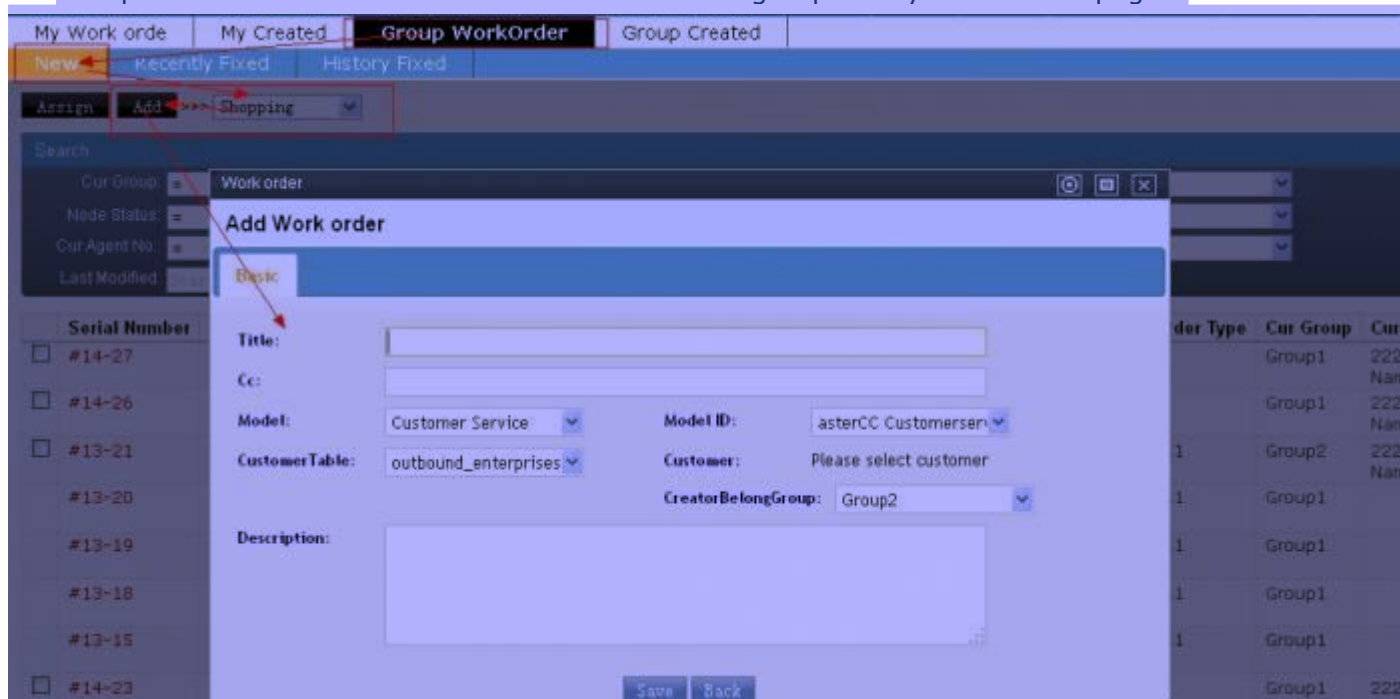
Missed call means when calls reach a queue, but the caller hangup before he talks to any agent, this calls will go to missed call list

Admin could create a special work order for such callers, don't miss any customers :)

- Campaign popup page (if it's bind to customer service call result and agent selects the call result)



- Group admin could create a new work order for his group in "My Work Order page"



FAQ: What should get noticed when I create a new work order?

- Keep it simple in Work Order name
- use CC to notify customer
- put more information in description so your co-worker know what need to do

If you see Group when you create a work order

Group: Group1

means you need to select which group you want to send this work order to

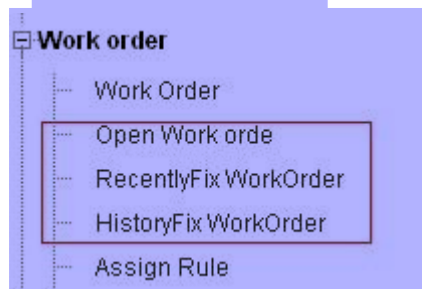
- When group admin create a work order, there're extra fields
- Model:** Select Campaign or Customer Service

- **Model ID:** Select the specific campaign or customer service
- **Table Name:** "outbound_enterprises" or "outbound_individuals", so you can select customer
- **Customer:** Select a customer which this work order belongs to
- **Group:** select which group you want to send this work order to

16.1 Work Order Log

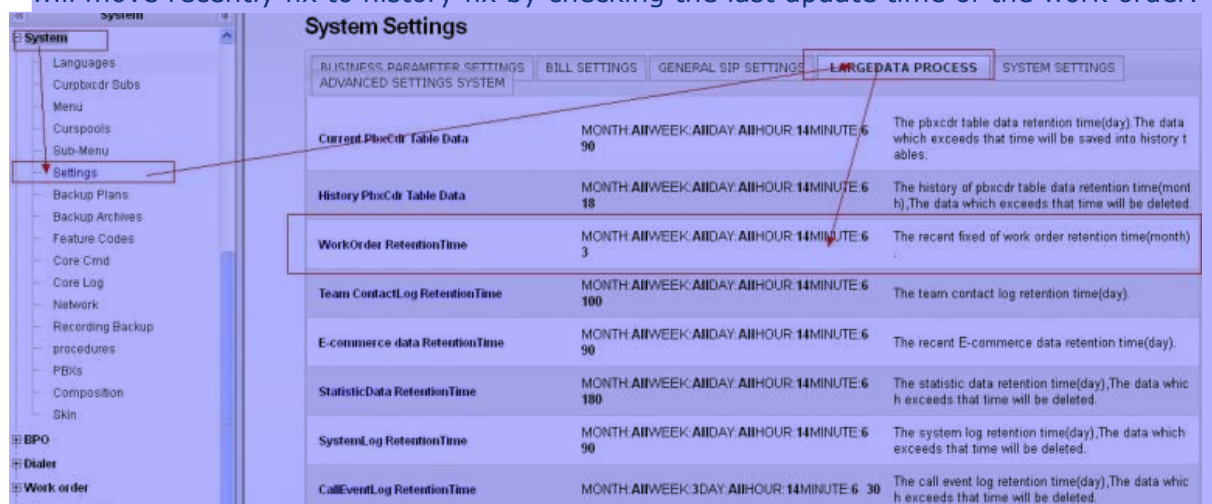
Every time when a work order template is created, system will create three new tables for it: unfinished, recently finished, history finished.

Admin could go to "Open Workorder" (unfinished), "RecentlyFix WorkOrder" and "HistoryFix WorkOrder" to check

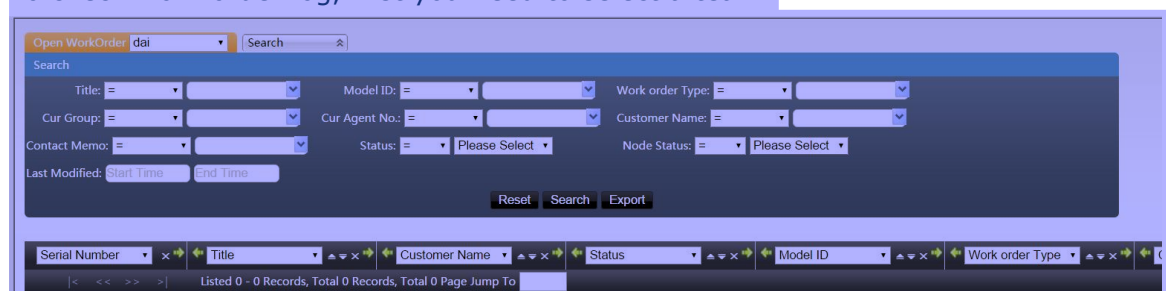


A new work order will go to "Open" automatically, when it's closed, it will go to "RecentlyFix" table.

Based on System → Settings → Large Data Process → WorkOrder Retention Time, system will move recently fix to history fix by checking the last update time of the work order.



To check work order log, first you need to select a team



Double click the work order, you can open it, for all work orders, finished or not, you can not change it

Work Order#13-21

Title: autoedit qfbqot ewf wotwotfwot
Cc: zhang3@astercc.com

Status: new Work order Type: test Model: Customer service

Model ID: astercc Group: Group2 Agent No.: 2227(My Name)

Customer Name: Mr Zhang Contact Memo: 5000 Created: 2013-05-15 16:13:37

Cur Group: Group2 Cur Agent No.: 2227(My Name) Last Modified: 2013-05-18 16:16:45

Workorder-hyic: Workorder-lqdt: Workorder-hyic: my

Workorder-gzpz: Workorder-ddrq: 2013-05-15 Workorder-jzsr: 2013-05-15 16:11:00

Workorder-jy:

Customer Information

Name: Mr Zhang Phone1: 50001 Phone2:

Email: zhang3@astercc.org Fax: 9999999 Address1: LianJing

Tag: BlackList: No ImportID: 0

LastContact Date: 2013-05-15 16:13:37 LastContact AgentNo: 2227 Enterprise: 0

Province: Beijing City: Beijing OutboundIndividual-district: ChaoYang

OutboundIndividual-office: ChaoYang Age: 44 Birthday: 1969-05-15

Description

Related Records Operation History of file Description Customer Information Back Top

If it's not finished, the current agent or agent group admin could make change. If the work order is set to "Everybody could change", then all agents could edit, but they can't change work order status.

Columns

History/Fix WorkOrder Please Select Search

Search

Title: = Model ID: = Cur Group: =

Cur Agentno: = Customer Name: = Contact Memo: =

Work order Type: = Please Select Status: = Please Select Last Modified: Start Time End Time

Reset Search Export

Serial Number Title Customer Name Status Model ID

Listed 0 - 0 Records, Total 0 Records, Total 0 Page Jump To

Serial Number
Title
Customer Name
Status
Model ID
Work order Type
Cur Group
Cur Agentno
Last Modified
Description
Cur UserName
Contact Memo
Created
UserName
Agentno
Group
Reset Title

Serial Number: # + work order template id + work order sequence number

Title: Title of the work order

Customer Name: Customer Name or Customer ID

Status: The status of the work order: Open, Pending, Closed

Node Status: he status of a node, New(not assigned), Pending, Return(the work order is returned by a node, or return by group admin/agent), Waiting For Verifying(waiting group admin to approve)

Model Id: From which model the work order is created from, such as a campaign, customer service etc.

Work order type: Work order template name

Description: When the work order is created, the creator will put some description about this work order

Agent Group: Current agent group

Agent No.: Agent number or empty(means the work order is not assigned yet)

Account: Account Username

Last Modified: Last modified time of the work order

Creator agent group: Agent group name of the creator

Creator agent number: Agent number of the creator

Creator: Username of the creator

Created: Created Time

16.2 Assign Rule

Please read [**work_order**] first before you start.

When a work order template is created, it will create a "assign rule" fro all groups in the work order, then group admin could change this rule.

In [**work_order**], the work order we created includes 5 nodes and 4 agent group, so you will see 4 records in Assign Rules page

These rules tell system, when there's a new work order in the group, how does the system assign them to agent. When agent finish his work, if it's mandatory to approve by group admin, these rules is only editable for group admin, nobody else could change even for system admin.

Parameters



Assign Rule is only editable for group admin

The screenshot shows two dropdown menus. The first is labeled 'AssignRule:' and has a dropdown arrow. The second is labeled 'Verify:' and also has a dropdown arrow. Both menus are open, showing the following options:

- AssignRule:** Manually Assigned, AgentNo. Order, fewest missons
- Verify:** Manually Assigned, AgentNo. Order, fewest missons

- **Assign Rule**
- **Manually Assign:** Default value, group admin will go to "My Work Order" assign work order to agents in the group
- **AgentNo. Order:** Automatically assign by system, new work orders will get assigned one by one, first goes to 1000, next goes to 1001, next goes to 1002 etc.
- **Fewest Missions:** Automatically assign by system, the agent who has fewest unfinished work order has higher priority

The screenshot shows a dropdown menu labeled 'GroupRule:' with a dropdown arrow. The menu is open, showing the following options:

- GroupRule:** Online, All

- **Group Rule** The range when system assign work order
- **Online:** only assign to online agents in the group
- **All:** assign to all agents in the group

The screenshot shows a dropdown menu labeled 'Verify:' with a dropdown arrow. The menu is open, showing the following options:

- Verify:** Yes, No

- **Verify:** When the work order is done by agent, if it requires group admin to verify to continue
- **Yes:** Need verify by group admin, if it's not pass, the work order will return to the agent
- **NO:** Don't need verify

16.3 My Work Order

Please login as agent to check My Work Order.

When an agent has unfinished work order, when they login, system will open "My Work Order" page.

My Work order

My Created

Group WorkOrder

Group Created

new

Recently Fixed

History Fixed

Search

Cur Group:

Work order Type:

Model ID:

Node Status:

Please Select

Status:

Please Select

Title:

Cur Agent No.:

Customer Name:

Contact Memo:

Last Modified:

Work Time

End Time

Reset

Search

Serial Number	Title	Customer Name	Contact Memo	Status	Node Status	Model ID	Work Order Type	Cur Group	Cur Agent No.	Last Modified
<input type="checkbox"/> #14-27	test return	Mr H	04318523452	pending	return	hostel	mmm w	Group1	2227(My Name)	2013-05-18 16:30:36
<input type="checkbox"/> #14-26	AUTO #14-25 33333333333	Meng1986	1986	new	Verify	M test	mmm w	Group1	2227(My Name)	2013-04-20 09:33:28
<input type="checkbox"/> #13-21	sdasd31wacasdas edasd	Zhang3	5000	new	new	hostel	test w1	Group2	2227(My Name)	2013-05-18 16:16:45
<input type="checkbox"/> #14-23	AUTO #14-21 test			new	new	hostel	mmm w	Group1	2227(My Name)	2013-05-06 15:18:11
<input type="checkbox"/> #13-14	AUTO #13-12 meng dd	asdadsa123123	1986	pending	new	hostel	test w1	Group1	2227(My Name)	2013-04-19 14:46:54
<input type="checkbox"/> #14-22	laqeo	LNa	13904369901	new	new	hostel	mmm w	Group1	2227(My Name)	2013-04-18 17:11:59
<input type="checkbox"/> #13-10	dfgsdgd	Long d	5000	new	new	hostel	test w1	Group2	2227(My Name)	2013-03-22 15:11:13
<input type="checkbox"/> #14-19	ccccvvvvvvvvvv	Long d	5000	new	new	hostel	mmm w	Group1	2227(My Name)	2013-03-22 15:08:53
<input type="checkbox"/> #14-18	dsadsdasdasdasdsd	Long d	5000	new	new	hostel	mmm w	Group1	2227(My Name)	2013-03-22 15:08:53

AgentGroup Portal

My Work order

Campaign

MyPopup

You can also open the page from the menu



GMS											
Sat 08/08/2023											
Group		Login		Pause		ACW		Dial		Status	
My WorkOrder		My Created				Not Checkin (00:00:13)		Hold		Consult	
New		Recently Fixed		History Fixed		Option		Caller		CB	
										Conf	
										Trans	
										Meg	
										Map	
Search											
Title =				Status =		Please Select		Node Status =		Please Select	
Model ID =				Work order Type =				Cur Group =			
Cur Agent No =				Customer Name =				Contact Memo =			
Last Modified		Start Time		End Time		Reset		Search			
Serial Number		Title		Customer Name		Contact Memo		Status		Node Status	
Model ID		Work Order Type		Cur Group		Cur Agent No.		Last Modified			
Listed 0 - 0 Records, Total 0 Records, Total 0 Page Jump To											

Categories

There four categories in "My Work Order"

- **My Work Order:** all work orders assigned to the agent
- **My Created:** all work orders created by the agent
- **Group WorkOrder:** only for group admin, all work orders belongs to the group
- **Group Created:** only for group admin, all work orders created by the group

There are three tags under each category

- **New**
- **Recently Fixed**
- **History Fixed:** all work orders which exceed a time (3 days by default, could be modified in System → Settings) will be moved from recently fixed to history fixed

Columns:

- **Serial Number:** # + Work Order Template ID + Work Order ID
- **Status:**
- **New**
- **Pending**

- **Done**
- **Node Status:**
- **New** not assigned or agent doesn't start yet
- **Pending** agent is working on it
- **Return** work order is returned by next node or not denied by group admin
- **Verify** waiting for verify by group admin

Double click the work order, check detail. **Edit Limit** in [work_order] decide if the agent has edit access. If the status is done, no body could change anymore.

Assign

Group admin is able to assign or re-assign work orders

The screenshot shows the 'Group WorkOrder' tab in the VINA-PBX interface. It includes search filters for 'Cur Group', 'Node Status', 'Cur Agent No.', 'Work order Type', 'Status', 'Model ID', 'Title', and 'Contact Memo'. Below the filters is a table of work orders with columns: Serial Number, Title, Customer Name, Contact Memo, Status, Node Status, Model ID, Work Order Type, Cur Group, Cur Agent No., and Last Modified. A red box highlights the first three rows of the table.

Serial Number	Title	Customer Name	Contact Memo	Status	Node Status	Model ID	Work Order Type	Cur Group	Cur Agent No.	Last Modified
#14-27	test return	Mr H	043185730828	pending	return	hostel	mmm w	Group1	2227(My Name)	2013-05-18 16:30:36
#14-26	AUTO#14-25 33333333333	meng1986	1986	new	Verify	M test	mmm w	Group1	2227(My Name)	2013-04-20 09:33:28
#13-21	sasdaq4444ss	Zhang3	5000	new	new	hostel	test w1	Group2	2227(My Name)	2013-05-18 16:16:45

Select the work order you want to assign


	Serial Number	Title	Customer Name	Contact Memo	Status	Node Status	Mo
<input checked="" type="checkbox"/>	#14-27	test return	Mr H	043185730828	pending	return	ho
<input checked="" type="checkbox"/>	#14-26	AUTO#14-25 33333333333	meng1986	1986	new	Verify	M
<input checked="" type="checkbox"/>	#13-21	sasdaq4444ss	Zhang3	5000	new	new	ho

Click [Assign] button

You must select the same agent group work order assignment

You can't assign work orders together when they are not in same group

System Message

Target Agent: Please Select 


Please Select

2001 (du)

00 (du)

2227 (My Name)

1986 (Jon)



select an agent, assign the work orders you selected

Why there're no check boxes for some work orders?

If it's configured auto flow in the work order, and it's waiting for assign by system, group admin is able to re-assign when it's finish

Work Order Detail

Double click in work order list, you can see all the information of the work order.

Work Order#14-27

Title: test return
Cc: meng@...com

Status: pending
ModelID: hotel
Customer Name: Mr H
Cur Group: Group1
Workorder-mtylc: ssssss

Work order Type: mmm w
Group: Group1
Contact Memo: 0131324540828
Cur Agent No.: 2227 (My Name)
Workorder-mslt: aa

Model: Customer service
Agent No.: 2227 (My Name)
Created: 2013-04-19 18:33:27
Last Modified: 2013-05-10 16:30:36

Customer Information











Name: Mr H
Email:
Tag:
LastContactDate: 0000-00-00 00:00:00
Province:
OutboundIndividual-office:

Phone1: 0131324540828 
Fax1:
BlackList: No
LastContactAgentNo:
City:
Age:

Phone2:
Address1: Jilin
ImportID: 332
Enterprise: 0
OutboundIndividual-district:
Birthday: 0000-00-00


          

First you will see work order information and customer information, double click the **bold text** to edit, grey text means read-only

short cut tools bar will stay at the bottom, you can use click-to-call, sms, email, fax, or click the shut cut so it show you the right messages

Description


dsadasd23sadasdasd

The description when the work order is created, read-only

fileFiles: aaa.csv [\[Delete\]](#) [\[Download\]](#) [\[Insert\]](#)

It will list all attachment of the work order, click [upload] to upload new file

History of

Changed by 2227(My Name) at 2013-04-19 18:34:35

Description: 2227Begin processing the node work

Contact with customers have the intention to buy

Changed by 2227(My Name) at 2013-04-19 18:35:17

Description: 2227Finished processing,WorkOrder continued downward flow

The sale of cigarettes in 10 boxes of \$130

History shows all note of the work order

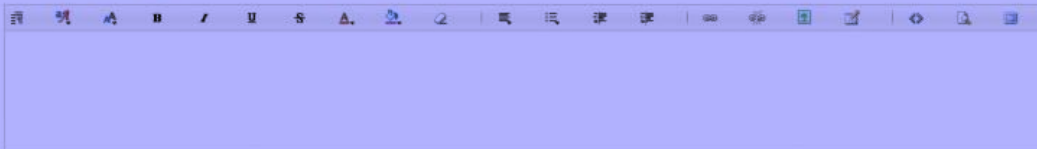
Changed by 2227(My Name) at 2013-04-19 18:34:35

Description: 2227Begin processing the node work

Contact with customers have the intention to buy

Related Records[Contact Log](#) [Recent purchase records](#)[Contact Way](#)[Contact Target](#)[campaignresult](#)[Memo](#)[AgentInfo](#)[Created](#)[Details](#)

Here you can read contact history and purchase history (need e-commerce module)

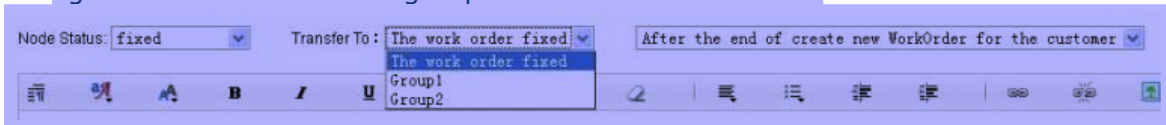
OperationNode Status: 

submit

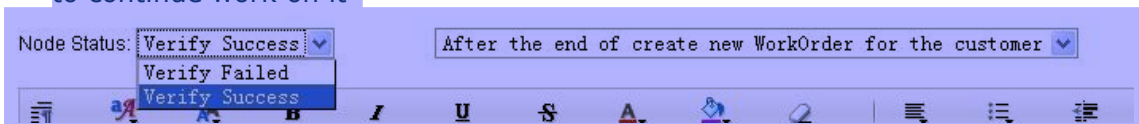
When agent edit a work order, besides the customization fields, he also need to put reply and change node status (node status is only editable by current owner and group admin)

For node status, we have "pending", "done", "return to node", "return to group", "verified", "denied"

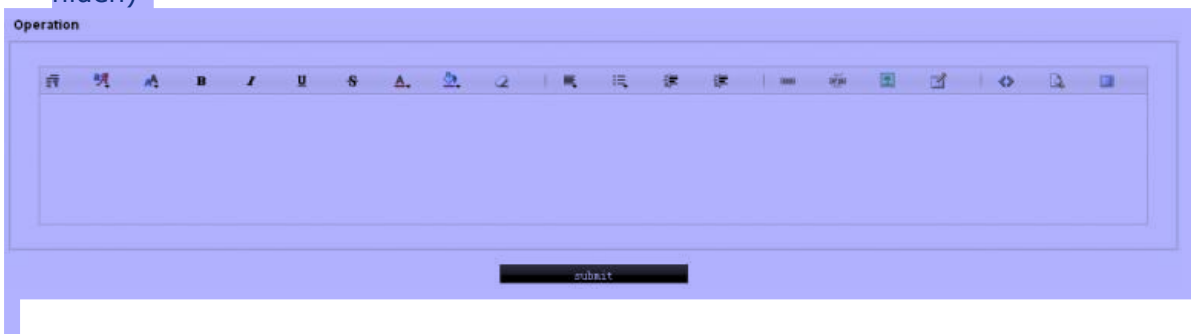
- if agent doesn't finish, please leave it as "pending"
- if agent finish the work order, please select "done", if there's no verify required then
- work order goes to next group (auto flow)
- agent is asked to select a group or finish the work order



- When the work order requires verify, nobody could change it unless group admin approve or deny
- When group admin deny the work order, the node status will change, and the agent have to continue work on it



- When it's the last node, when group admin approve, the whole work order will finish
- Depends on Edit Limit, if you don't have the access, you can only reply (status will be hidden)



17 Dialer

17.1Dialer

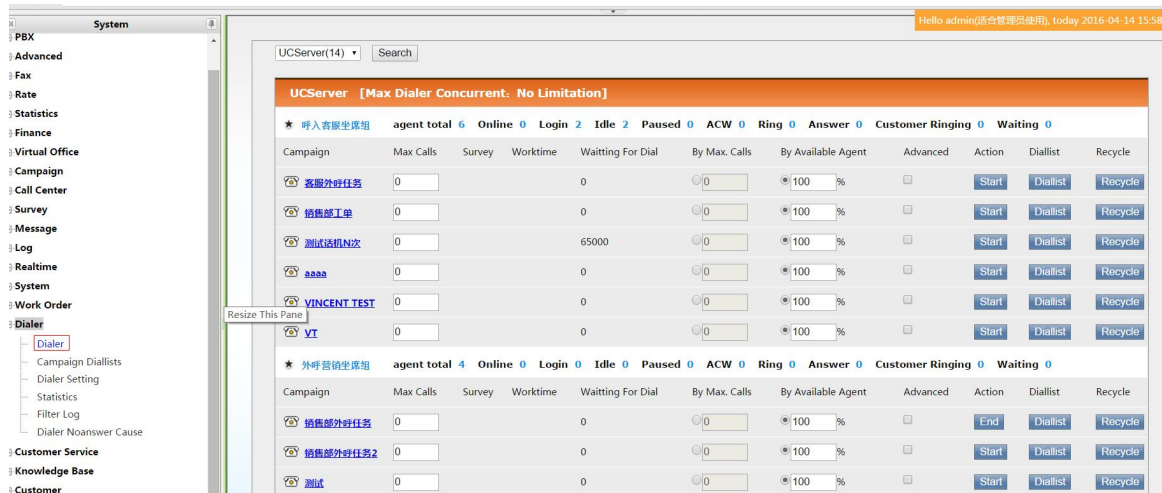
Usually can be called pre dial, which allows agents always on the phone talking.

When using predictive dialer, system will dial a batch of customer numbers, and customer answer the call, system will transfer the call to a queue, then call agents in the queue to talk to customers

- If no calls are connected, even there are idle agents, they would not get any calls
- When customer answered a call, they will go to a queue, if there are idle agents, agent phone will ring, and when agent answered the call, they will talk to the customer

The benefits of using predictive dialer:

- agent don't need wait for ringing time
- agent don't need wait for not available phones
- agent don't need to do anything but answer calls



Flow: The dialer calls the customer, when the customer picks up the phone, the dialer switches the call to the idle agent.

Advantages: Save agents' time which should have been used in dialing and waiting, and avoid the customers who cannot get connected.

Use: Outbound marketing campaign, promoting, broadcasting; playing record after picking up; phone number filter (Distinguish the numbers can be reached from those cannot in a pile of numbers.)

System administrator, team administrator and group leader are able to enter the dialer page to set the dialer.

First we may want to know the structure of the dialer page.



“VINA-PBX” is the name the system administrator set for this team.

“Max dialer concurrent: 10” The system administrator and the team administrator can set this in the dialer setting page. In this whole team, 10 calls can happen at the same time maximally, that is, the total number of the calls get connected, be waiting, and ringing cannot exceed 10. Even if the three add up to 10 and you still have 2 idle agents, the system will not keep placing calls. This number have influence on the effects of the dial.



Group 1 is the name of the agent group, and the parameters behind are the agents statistics.

Only the outbound campaign which opened the dialer will be shown in the table below (the task of group 1).

Campaign	Max Calls	Survey	Worktime	Waiting For Dial	By Max. Calls	By Available Agent	Advanced	Action	Diallist	Recycle
 Customer visit	<input type="text" value="0"/>			0	<input checked="" type="radio"/> 1	<input type="radio"/> 0 %	<input type="checkbox"/>	<button>Start</button>	<button>Diallist</button>	<button>Recycle</button>

Campaign: the name of the campaign, click the name and you can see the real time call information (how many are ringing, how many are waiting and how many are on the call.)

Ringing: 0																							
Phone		Customer		Start Time		Ringing(s)		Phone		Customer		Start Time		Ringing(s)									
Talking: 0																							
Phone		Customer		phone/No./name		Answer Time		Wait Time		Billsec		Phone		Customer		phone/No./name		Answer Time		Wait Time		Billsec	
Waiting: 0																							
Phone		Customer		Start Time		Answer Time		Wait(s)		Phone		Customer		Start Time		Answer Time		Wait(s)					

Max calls: the function is the same as the max dialer concurrent, only this one is for this specific task. This parameter valid in the "By max calls" mode.

Worktime: the dialer dials in the specific time range. Not entering anything here means it dials all the time as long as the dialer is enabled.(if it is in "By available agent" mode, only when there is signed in agent can it dial.)

Waiting for dial: How many customers are left in the list to be called. If there are not enough, please recycle in time.

By max calls: Dial according to available concurrent. Generally, available concurrent = max-occupied. But in the advanced settings, some parameters can affect the available concurrent. You can regard this as the top limit.

Max call concurrent follows: license limit >= team >= campaign >= current setting



If your concurrent setting exceeds the above one, then the above one will be replaced by the new figure you have set.

By available agent: Dial according to the idle percentage of agents. (When using this mode, if there is no agent signed in, the system will stop dialing.) If one online agent is idle, and the percentage we enter 200, that means every time it dials 2 customers. (The parameter in the advanced settings will influence the customer number here.)

Click **【Start】** to enable the dialer.

Advanced setting

Tick "Advanced" and open the advanced setting page to configure the advanced settings to cooperate with the dialer.

Campaign	Max Calls	Survey	Worktime	Waiting For Dial	By Max. Calls	By Available Agent	Advanced	Action	Diallist	Recycle			
 客服外呼任务	<input type="text" value="0"/>			<input type="text" value="0"/>	<input type="radio"/> 0	<input checked="" type="radio"/> 100 %		<input type="button" value="Start"/>	<input type="button" value="Diallist"/>	<input type="button" value="Recycle"/>			
Dial Limit	<input type="text" value="10"/>	Dialer Interval	<input type="text" value="3"/>	Answered Rate	0.0%	<input type="text" value="50"/>	Answered Ringing	0	<input type="text" value="15"/>	Customer Waiting	<input type="text" value="10"/>	Hangup Ring When No Idle	disabled
Enable Adv-setting	<input checked="" type="checkbox"/>	Talking Time	0	<input type="text" value="60"/>	ACW Time	27	<input type="text" value="15"/>	Short Call Time	<input type="text" value="15"/>	Short Call ACW Time	<input type="text" value="0"/>	Short Call Rate	<input type="text" value="50"/> %

These parameters have influence on the predicted effect, and administrators shall adjust it according to the reference value the system gives, in order to make sure that each agent can get another call as soon as he hang up one call (ideal situation). Due to the fact that each task requires different length of call and the number quality differs so that the efficiency of the dialer decreases(at first many get connected, then many cannot), we need the team leader observe carefully during a task.

These are the parameters in the advanced settings,

Dial Limit: The max number of calls each time the dialer places.

Let's assume that we dial **by available agent**, the idle agents are **3** and the percentage is **300%**, the max concurrent of your team is **20**, the number of customers in call is **7**, and the number of customers in ring is **2**, the number of customers waiting is **4**, and the dial limit is **5**.

Theoretically, the dialer is placing $3 \times 300\% = 9$ calls, but according to the concurrent setting of the team, there should be only $20 - 7 - 2 - 4 = 7$ calls, and now we found that the dial limit is 5, then the dialer only places 5 calls this time. This limit is to distribute the customers in ring more averagely (to split the calls to several times to get a better agent answer rate), avoid too many customers answering the call at the same time, which would be a waste of customer data. And mathematically, there will be less idle agents.

Dialer interval: How many seconds between two calls the dialer dials.

The dialer is detecting the campaign which enables the dialer function and calling the customers automatically.

For example, if you enter 8 here, and the first time the task placed the call on 17:58:21, and on 17:58:25 it detected that this task enables the dialer, but the time gap has not reached 8 seconds, so there will be no dialing now. Only on 17:58:29 will the dialer dials. This function too is for avoiding too many customers answering the call at the same time, which would be a waste of customer data. And mathematically, there will be less idle agents.

Answered rate: The number ahead the box is the number the system calculated (by now, answered customers/dialed customers), administrator can enter the predicted answered rate according to this number and adjust the dialer concurrency.

Assume that there are 2 idle agents, and the system predicts that there is going to be another idle one, and to make sure they will get calls immediately, we need to call 3 customers and they must all answer, so the three agents can be engaged. But the answered rate is 80%, which means we call 10, and 8 will answer. So the system predicts that $3 / 0.8 = 3.75 \approx 4$ customers shall be called.

This number follows the concurrent limit for whole campaign and concurrent limit for every single time. If this number exceeds the limit, we use the lowest limit number.

Answered ringing: By now in all the customers who answered, how long it rings until the phone is picked up. You can enter according to the number which the system calculated, that is, the possible customer who will answer. After the time set here, we may consider this customer will not answer the call.

Assuming that there are 3 idle agents, the customers in ringing are A(2s), B(2s), C(5s) and D(11s), the average answered ringing time is 9s, and we mentioned that in order to fulfill the 3 agents we have to call 4 customers. ABC are all in ringing, and D has already exceeded 9s, so the dialer predict that there are only 3 may answer the call. And now we just need to call $4 - 3 = 1$ customer to fulfill these 3 agents.

Customer waiting: All the customers who has picked up the phone will be put into a waiting queue, and the system will assign these customers to idle agents. This is how long a customer waits to be get connected to the agent after picking up the phone. That is, customers in the queue who has been waiting for less than this time are likely to get connected to the agents.

That means when the dialer dials again, it will dial less customers. Some may ask, **since there are no idle agents, why does it still dial?** That's because as soon as the agent becomes idle, the customer in the queue will be connected to the agent, so that there won't be more customers in waiting (therefore, this parameter would reduce the answered

customer loss). **You may ask, why system continue dial even there're no idle agents?**

To reduce the agent idle time, it's necessary to predict when the call will end, so agent and customer will perfectly match

Enable Adv. Settings When its checked, the following options will be applied to dialer

Talking time: The average talking time between agents and customers.

ACW time: If the agent group is configured to use ACW, when agent hangup a call, they will enter ACW mode, system will think the agent is not ready to take another call, this means the average time for agent to exit acw mode

Short call means for some customer, after they start to talk with agents, they just hangup or refuse to continue after a period of time.

Short call time: The average taking time for a "short call"

Short call acw time: How long it will take agent to finish a "short call" if acw is enabled.

Short call rates: The percentage of short calls in all answered calls.



When using By Max Calls, only Dial Limit and Dialer interval will affect

Fo

rmula in dialer

Now we talk about the algorithm

By Max. Calls

- **Numbers to dial** = Max. Calls - Ringing customers - Waiting customers - Talking customers

By available agents

- Available Agents = All idle agents (exclude the "Outbound Only")
- Valid Ringing Customers = (Ringing time \leftarrow "Answered Ringing") * Answered Rate
- Valid Waiting Customers = Customer waiting time < "Customer Waiting"
- **Numbers to dial** = (Available Agents - Valid Ringing Customers - Valid Waiting Customers)/Answered Rate* Percentage

By available agents (Enabled Adv. setting)

- Available Agents = All idle agents (exclude the "Outbound Only")
- Available Agents from ACW = Agent who is in ACW and his his ACW time is greater than ("ACW Time" - "Answered Ringing")
- Available Agents from short calls = Current answered customer number * short call rate

Duration of a call should be greater than (Short call time + short call ACW time - Answered Ringing)

- Available Agents from long call = Current call duration is greater then short call time and greater than (Talking time + ACW time - Answered Ringing)
- Valid ringing customers = (Current ringing \leftarrow Answered Ringing) * Answered rate
- Valid waiting customers = Current waiting time < "Customer Waiting"

- **Numbers to dial**= (available agent + available agent from ACW + available agent from short calls + available agent from long calls - valid ringing - valid waiting) / Answered Rate * Agent percentage



The numbers is the max number it is supposed to dial, but the actual numbers dialed will be limit by campaign max calls, max calls for each dial, license in predictive dialer, dial limitation of the team

Di

al list

From the dial list, it would list all numbers waiting in the list

All	Customer	Phone Num.	Dialer Status	Priority	autocount	Start Time	Dial Time	Duration	Agent Billsec	Callee Billsec
<input type="checkbox"/>	12332111111	12332111111	Open	12	0	0000-00-00 00:00:00	0000-00-00 00:00:00	00:00:00	00:00:00	00:00:00
<input type="checkbox"/>		1366426227	Open	0	0	0000-00-00 00:00:00	0000-00-00 00:00:00	00:00:00	00:00:00	00:00:00
<input type="checkbox"/>		1986	Open	0	0	0000-00-00 00:00:00	0000-00-00 00:00:00	00:00:00	00:00:00	00:00:00
<input type="checkbox"/>		5000	Open	0	0	0000-00-00 00:00:00	0000-00-00 00:00:00	00:00:00	00:00:00	00:00:00
<input type="checkbox"/>		9501	Open	12	0	0000-00-00 00:00:00	0000-00-00 00:00:00	00:00:00	00:00:00	00:00:00

If the dial status is not open, means the dialer dialed the number, but the record is not removed yet, it will take 1 minute to remove the data when the call finish.

"Delete Checked": delete checked records from current page

"Delete All": delete all matched records from dial list



You can only delete when the status is open

Re

cycle

This function is used to copy the numbers from customer list to the predictive dialer list.

Dialer data collection

Recycle Checked Recycle All By Conditions [Hide Search](#)

Search

Customer: LIKE Agent No.: LIKE Dialer Status: = Please Select

Phone: LIKE Duration: LIKE Agent Billsec: LIKE

Callee Billsec: LIKE autocount: = Customer Status: = Please Select

Dial Time: Start Time End Time Callee Answer: Start Time End Time Agent Answer: Start Time End Time

Created: Start Time End Time

Reset Search

<input type="checkbox"/> All	Recycle	Customer	Agent No.	Customer Status	Dialer Status	Phone1	Phone2	Duration	Agent Billsec	Callee Billsec	autocou
<input type="checkbox"/>	Recycle		0	open	Open	18888888888		00:00:00	00:00:00	00:00:00	0
<input type="checkbox"/>	Recycle		0	open	Open	18666666666		00:00:00	00:00:00	00:00:00	0
<input type="checkbox"/>	Recycle		0	open	Open	18777777777		00:00:00	00:00:00	00:00:00	0
<input type="checkbox"/>	Recycle		0	open	Open	1366426227		00:00:00	00:00:00	00:00:00	0
<input type="checkbox"/>	Recycle		0	open	Open	1986		00:00:00	00:00:00	00:00:00	0

Recycle Checked, only recycle the checked customers

Recycle All By Conditions, recycle all customers in the package which math the conditions

You need put the following parameters before recycle

Phone Num: The field which will be copied to dial list.

Priority: An integer, the bigger it is, the higher priority it has.

Scheduler: When you want the dialer call the number, it is 0000-00-00 00:00:00 by default, means any time.

Recycle Customer

Choose Recycle Conditions

Choose Phone Num. to recycle: Phone1

Priority: 0

Schedule: 0000-00-00 00:00:00

Save Back

You could recycle the customers according to your actual needs. Usually you'd like to recycle dial status = Customer Answered, which means customers answered the call but somehow agent didn't talk to them.

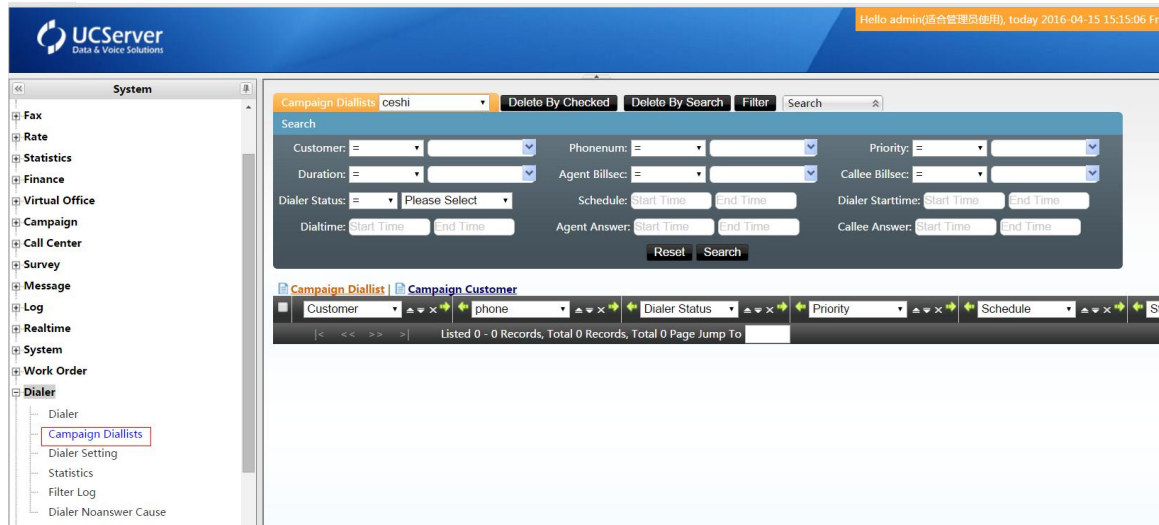
17.2 Campaign Diallists

The Diallist is the extended module of Dialer, except for managing diallist and recover data, 预 it also has filter function.

The relationship between diallist and customer package: Customer package is the real existence of customer data, every time you import data, are imported into the customer package. The campaign diallist is the duplication of customer package, only for dialing. After finishing the campaign, the system will reimport the data into customer package, and these data will be deleted from the diallist, indicates finishing one predail. Please use recycle function if you want to reuse the data in the customer package, copy them to diallist.

Campaign Diallist Data

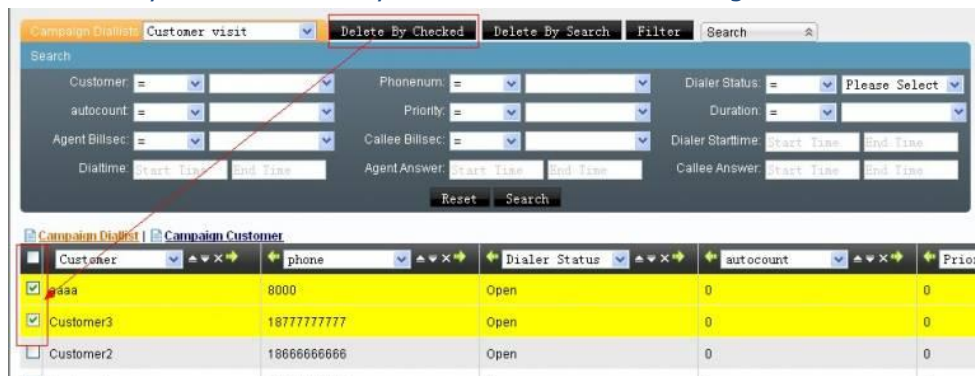
On the left menu, please go to **[Dial]** -> **[Campaign Diallists]** to open the page. Select a team from Campaign Diallist:



Once the dial plan enable and there are agents login, the system will dial the customers' numbers on the diallist automatically.

If there are numbers you don't want to dial out, you can delete them.

【Delete by Checked】 : only a few data needs deleting



【Delete by Search】 : huge data needs deleting

Please set the search conditions on below page. It suggests not deleting data more than 5000 at once.

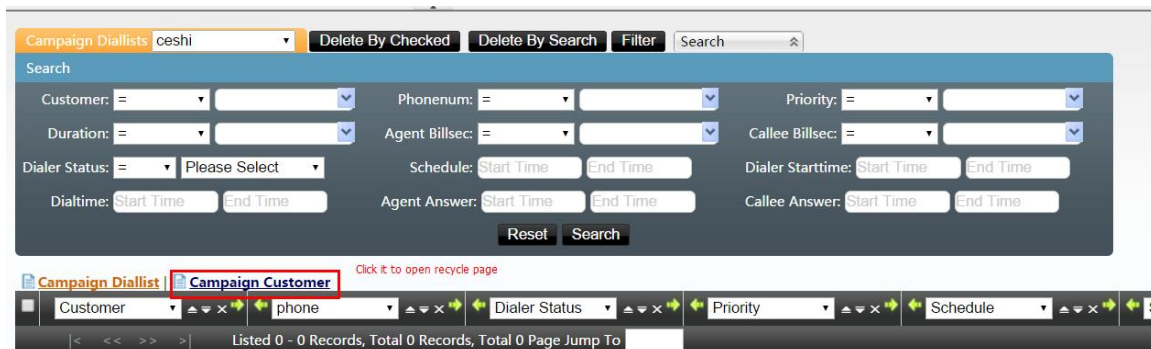


If no search condition, all the data will be deleted.

Note: Only those data stands by for dialing can be deleted. The reset date will be moved automatically.

Recycle

Click **【Campaign Customer】** to customer package, it shows all the date in the customer package. Please do recycling here.



The screenshot shows the 'Campaign Customer' interface. At the top, there's a 'Campaign Diallists' dropdown set to 'ceshi'. Below it are buttons for 'Delete By Checked', 'Delete By Search', 'Filter', and a search bar. The main section is a search form with various filters: Customer, Phonenum, Priority, Duration, Agent Billsec, Callee Billsec, Dialer Status, Schedule, Dialer Starttime, Dialtime, Agent Answer, and Callee Answer. Each filter has a dropdown menu and a time range selector. At the bottom, there are 'Reset' and 'Search' buttons. Below the search form, there's a navigation bar with 'Campaign Diallist' and 'Campaign Customer' (highlighted with a red box). A link 'Click it to open recycle page' is next to 'Campaign Customer'. Below the navigation bar, there's a table with columns: Customer, phone, Dialer Status, Priority, and Schedule. The table is currently empty, showing 'Listed 0 - 0 Records, Total 0 Records, Total 0 Page Jump To'.

【Recycle by Checked】 : only a few data needs recycling



The screenshot shows the 'Recycle by Checked' interface. At the top, there's a 'Campaign Diallists' dropdown set to 'ceshi'. Below it are buttons for 'Filter', 'Recycle by checked' (highlighted with a red box), 'Recycle by conditions', and a search bar. The main section is a search form with various filters: Customer, Phone1, agentno, Recognition Result, Priority, Duration, Agent Billsec, Callee Billsec, gender, age, birthdate, fax1, email, address1, country, memo, flag, Status, Dialer Status, created, updated, Schedule, Dialer Starttime, Dialtime, Agent Answer, and Callee Answer. Each filter has a dropdown menu and a time range selector. At the bottom, there are 'Reset' and 'Search' buttons.

【Delete by Search】 : huge data needs recycling

Please set the search conditions on bellow page. It suggests not recycling data more than 5000 at once.

Campaign Diallists: ceshi Filter Recycle by checked Recycle by conditions Search

Search

Customer: = Phone1: =
Phone2: = Agentno: =
Recognition Result: = Priority: =
Duration: = Agent Billsec: =
Callee Billsec: = gender: =
age: = birthdate: =
fax1: = email: =
address1: = country: =
memo: = flag: =
Status: = Please Select Dialer Status: = Please Select
created: Start Time End Time updated: Start Time End Time
Schedule: Start Time End Time Dialer Starttime: Start Time End Time
Dialtime: Start Time End Time Agent Answer: Start Time End Time
Callee Answer: Start Time End Time

Reset Search

If no search condition, all the data will be recycled.
The bellow windown will popup when click Recycle:

Recycle Customer

Choose Recycle Conditions

Choose Phonenum: phone1
Priority: 0
Schedule: 2016-04-15 15:37
Reset Agent: ☒

Save Back

Choose Phone Num: Which phone number field to select.

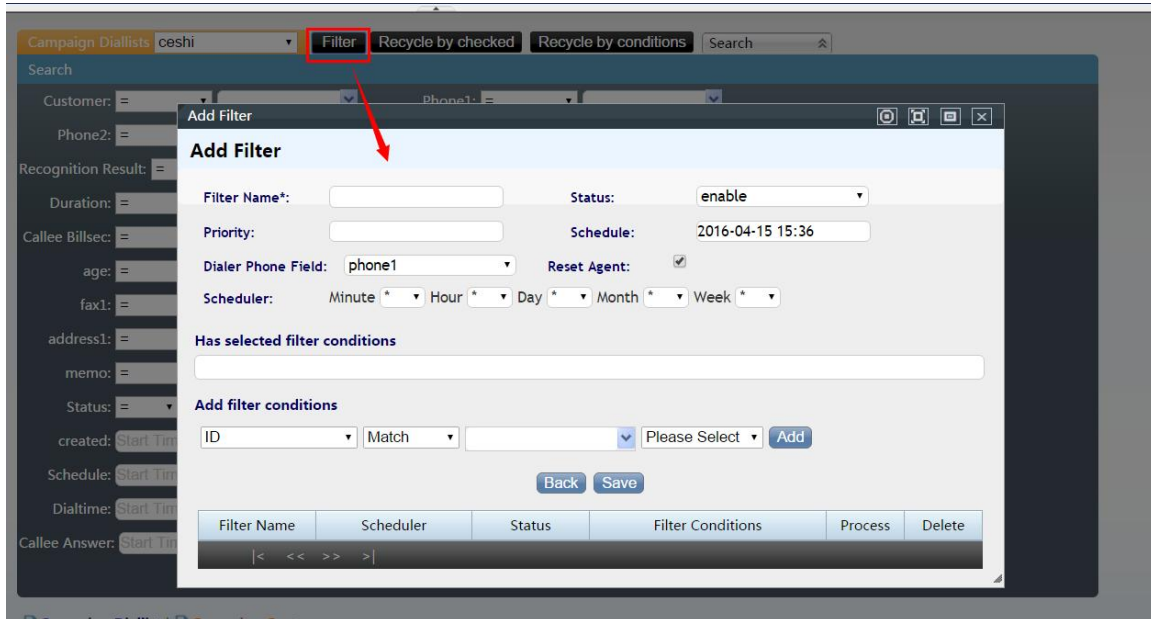
Priority: The priority of the phone numbers, the bigger the priority the higher priority.

Schedule: When to make the calls. Default value 0000-00-00 00:00:00 is anytime.

Filter

We always need to recycle a same data when using campaign diallist. In order to avoid this, we can use the Filter.

Click **Filter** to open Add Filter page:



Filter Name: Name this filter

Status: Only when enable will the system doing recycling on this filter.

Priority: the priority of the filter. The bigger the filter, the higher priority.

Schedule: When to make the calls. Default value 0000-00-00 00:00:00 is anytime.

Dialer Phone Field: Which customer phone field to call.

Scheduler: When will the filter begin recycling.

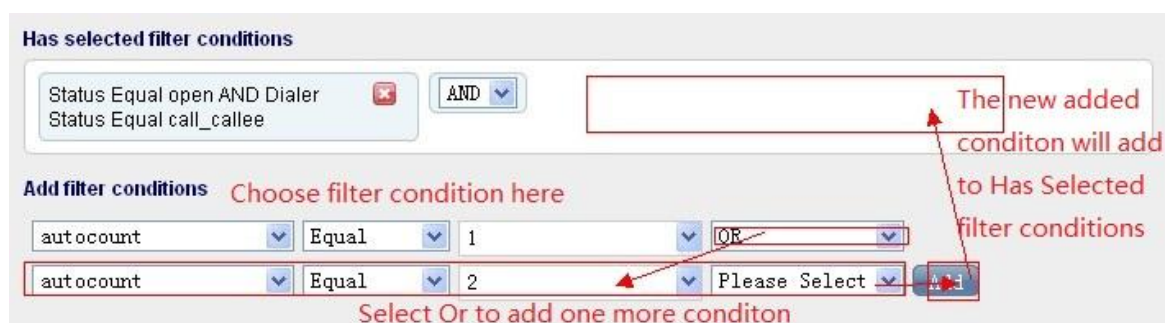
If set Minute, Hour, Day, Month and Week value as *, the filter will recycle anytime when the matched data occurs. If you want it recycles every day, you can set 0 Minute 0 Hour *Day *Month *Week, then it will recycle at 00:00 every day.

Has Selected filter conditions:

This box shows the has added filter conditions.

Add filter conditions

Add the filter condition on below:

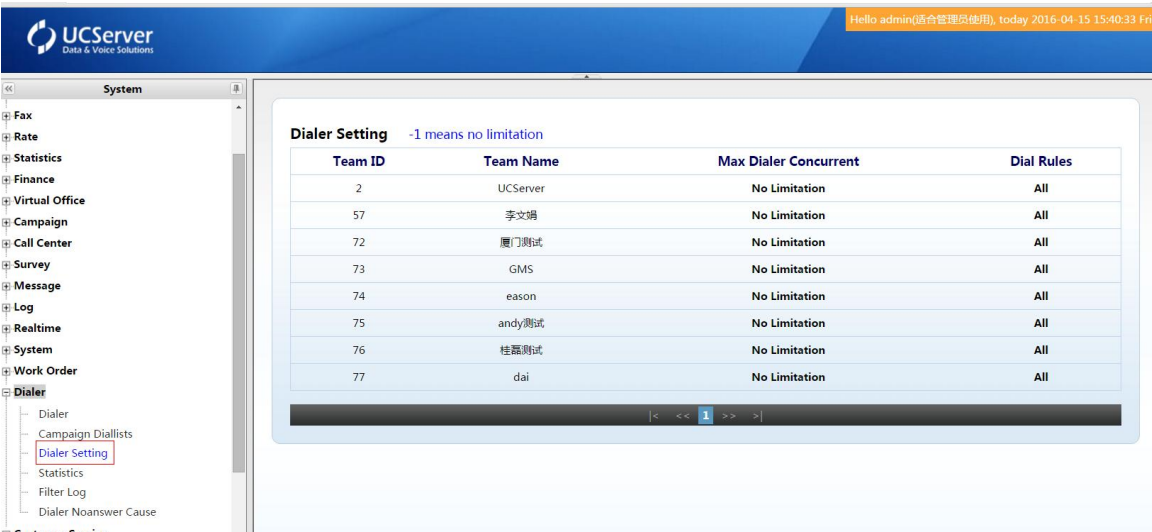


Please go to Filter Log to check the filter execute time, end time and total etc.

The filter in fact, is to imitate the process of artificial data recycle, and to reduce the amount of labor. You only need to set up the conditions one time, then the system follow the time to do the recycle.

17.3 Dial Setting

On the left menu, please go to [Dialer] -> [Dialer Setting] to open the page.



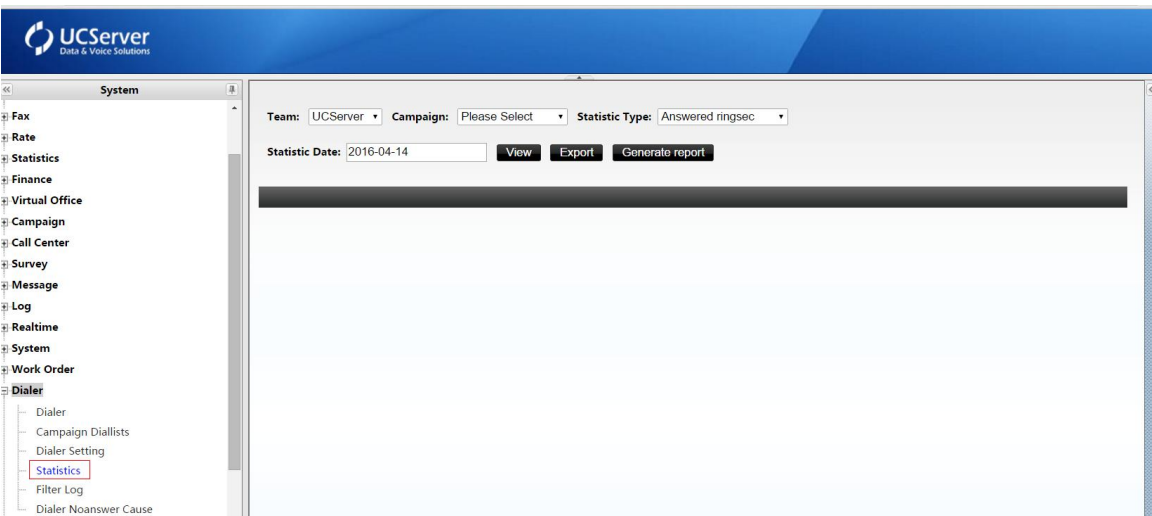
Dialer Setting -1 means no limitation

Team ID	Team Name	Max Dialer Concurrent	Dial Rules
2	UCServer	No Limitation	All
57	李文娟	No Limitation	All
72	厦门测试	No Limitation	All
73	GMS	No Limitation	All
74	eason	No Limitation	All
75	andy测试	No Limitation	All
76	桂磊测试	No Limitation	All
77	dai	No Limitation	All

This page shows all the teams' dialer setting, their max dialer concurrent and dial rules. You can double click each team's max dialer concurrent and dial rules to edit them.

17.4 Statistics

On the left menu, please go to **[Dialer]** -> **[Statistics]** to open the page.



Team: UCServer Campaign: Please Select Statistic Type: Answered ringsec

Statistic Date: 2016-04-14 View Export Generate report

This statistics only record data of pre dial.
The dialing is within the statistic scope and not calling out at
0000-00-00 00:00:00

Statistic Type

Callee waitsec

Firstly, we need to understand the process of pre-dial. Pre-dial is the system calls customer firstly, when customer answers the call, the system will swift the established call to idle agent. In a word, the customer's talking time maybe longer than agent's talking time.

That is because when call established, there maybe no idle agent, then the customer talking time – agent talking time > 0, callee with waiting time.

This callee waitsec calculates the data of [customer answering time!=0000-00-00 00:00:00 and customer talking time – agent talking time > 0]

[2013-06-14] mittop Team web_kids Campaign Callee waitsec Statistical report		
Time(S)	Number	Percentage(%)
1	2412	89.5
2	62	2.3
6	33	1.2
4	27	1
3	26	1

This pic shows 2412 callees wait 1secs before agent gets the call. 62 callees wait 2 secs.

Time = how long the customers wait

Number = the callee numbers based on different waiting time

Percentage = Number/total callees

Callee Giveupsec

Giveup, means the callee gives up the call before agent answer the call. Including a special situation that the callee hangs up the moment agent answers the call. Means the agent has answered time, but talking time=0.

This callee giveupsec calculates the data of [customer answering time!=0000-00-00 00:00:00 and customer talking time=0]

[2013-06-14] mittop Team web_kids Campaign Callee giveupsec Statistical report		
Time(S)	Number	Percentage(%)
6	26	20
7	16	12.3
8	14	10.8
11	14	10.8
9	12	9.2

The above pic shows 20% of callees will wait 6 secs before hangup.

Time = how long the callees wait

Number = the callee numbers based on different waiting time

Percentage = Number/total callees

Answered Ringsec

For those established callees, how many rings before they picking up.

It calculates the data of [customer answering time!=0000-00-00 00:00:00]

[2013-06-14] mittop Team web_kids Campaign Answered ringsec Statistical report		
Time(S)	Number	Percentage(%)
13	326	8.4
11	314	8.1
12	303	7.8
14	289	7.5
15	280	7.2

The above pic shows 326 callees answered the call after 13 seconds.

Time = how long the callees wait

Number = the callee numbers based on different waiting time

Percentage = Number/total callees

Success Billsec

It calculates the data of[customer status=success and answering time>0]

[2013-06-14] mittop Team web_kids Campaign Success billsec Statistical report		
Time(S)	Number	Percentage(%)
99	2	6.7
189	2	6.7
208	1	3.3
144	1	3.3
215	1	3.3

The above pic shows 2 success callees with talking time 99 secs, its percentage is 6.7%

Time = how long the callee talks

Number = the callee numbers based on different waiting time

Percentage = Number/total success callees

Failed Billsec

It calculates the data of[customer status=failed and answering time>0]

[2013-06-14] mittop Team web_kids Campaign Failed billsec Statistical report		
Time(S)	Number	Percentage(%)
13	157	4.3
14	154	4.2
12	149	4.1
17	128	3.5
16	126	3.4
19	125	3.4

The above pic shows 157 failed callees with talking time 13 secs, its percentage is 4.3%.

Time = how long the callee talks

Number = the callee numbers based on different waiting time

Percentage = Number/total failed callees

Pending Billsec

It calculates the data of[customer status=pending and answering time>0]

[2013-06-14] mittop Team web_kids Campaign Pending billsec Statistical report		
Time(S)	Number	Percentage(%)
33	2	4.8
57	2	4.8
39	2	4.8
153	2	4.8
189	1	2.4

The above pic shows 2 pending callees with talking time 33 secs, its percentage is 4.8%.

Time = how long the callee talks

Number = the callee numbers based on different waiting time

Percentage = Number/total pending callees

Open Billsec

It calculates the data of[customer status=open and answering time>0 and result=0]

The agent has talked with this customer, but for some reason, not record this call.

[2013-06-14] mittop Team web_kids Campaign Open billsec Statistical report		
Time(S)	Number	Percentage(%)
12	2	16.7
35	1	8.3
16	1	8.3
47	1	8.3

The above pic shows 2 open callees with talking time 12 secs, its percentage is 16.7%.

Time = how long the callee talks

Number = the callee numbers based on different waiting time

Percentage = Number/total open callees

Success followupsec

The follow time, how long the agents take to deal with finished calls(save record, modify customer info).

It calculates the data of follow up time of [customer status=success]

If agent not enable followup module, then the followupsec is 0.

[2013-06-14] mittop Team web_kids Campaign Success followupsec Statistical report		
Time(S)	Number	Percentage(%)
0	30	100

Listed 1 - 1 Records, Total 1 Records, Total 1 Page Jump To

Time = how long the callee talks

Number = the callee numbers based on different waiting time

Percentage = Number/total success callees

Failed followupsec

It calculates the data of follow up time of [customer status=failed]

Time = how long the callee talks

Number = the callee numbers based on different waiting time

Percentage = Number/total failed callees

Pending followupsec

It calculates the data of follow up time of [customer status=pending]

Time = how long the callee talks

Number = the callee numbers based on different waiting time

Percentage = Number/total pending callees

Distribute Rate

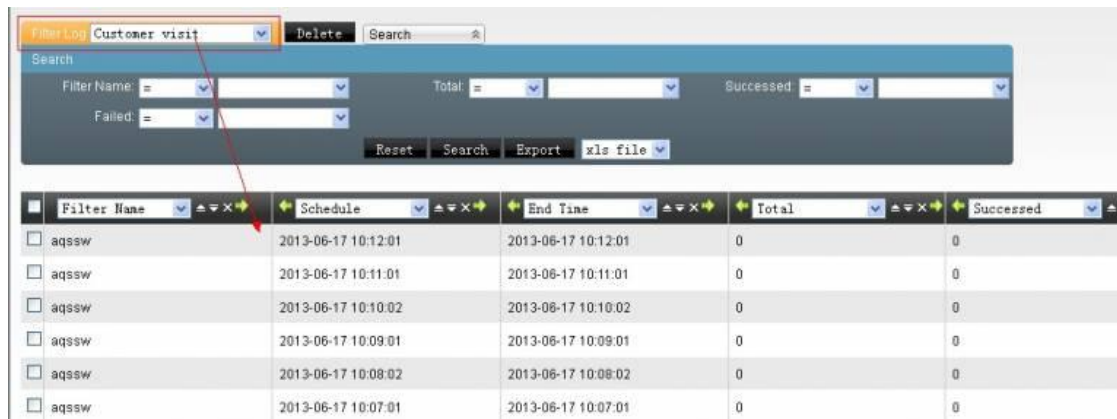
[2013-06-14] mittop Team web_kids Campaign Distribute Rate Statistical report		
Item	Number	Percentage(%)
No Answer	5544	58.9
giveup	1180	12.5
success	30	0.3
failed	3693	39.2
pending	42	0.4
No Save	5652	60

Listed 1 - 6 Records, Total 6 Records, Total 1 Page Jump To

These items' percentage is base on the total pre dial numbers.

17.5 Filter Log

The filter logs of each dialer are shown according to different dial plan.



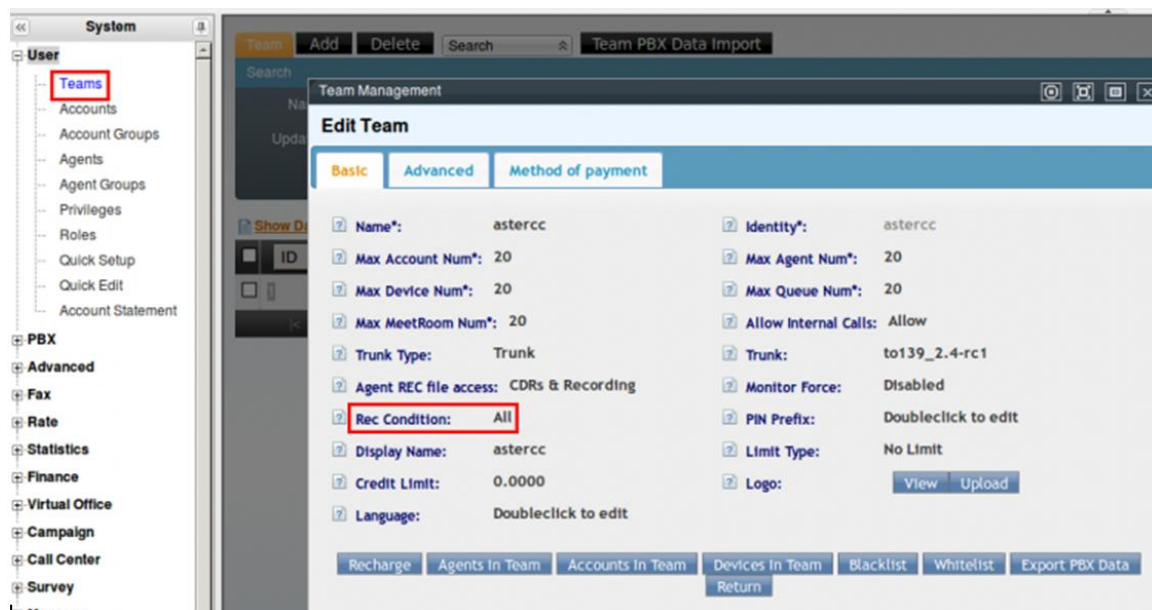
Filter Name	Schedule	End Time	Total	Succeeded
<input type="checkbox"/> aqssw	2013-06-17 10:12:01	2013-06-17 10:12:01	0	0
<input type="checkbox"/> aqssw	2013-06-17 10:11:01	2013-06-17 10:11:01	0	0
<input type="checkbox"/> aqssw	2013-06-17 10:10:02	2013-06-17 10:10:02	0	0
<input type="checkbox"/> aqssw	2013-06-17 10:09:01	2013-06-17 10:09:01	0	0
<input type="checkbox"/> aqssw	2013-06-17 10:08:02	2013-06-17 10:08:02	0	0
<input type="checkbox"/> aqssw	2013-06-17 10:07:01	2013-06-17 10:07:01	0	0

In this log, we can see the start time and end time of each performance, and the theoretical customer number and the actual recycled customer number under the filter condition. In the dialer chapter, we said each filter shall have its own name so as to be identified, or the log will not show that by which filter it is generated.

17.6 Dialer No Answer Cause



This function is used to count the recognition of phone status. we need to set the Rec Condition of teams to "All" before enable this function. as it shown below:



System

- User
 - Teams**
 - Accounts
 - Account Groups
 - Agents
 - Agent Groups
 - Privileges
 - Roles
 - Quick Setup
 - Quick Edit
 - Account Statement
- PBX
- Advanced
- Fax
- Rate
- Statistics
- Finance
- Virtual Office
- Campaign
- Call Center
- Survey
- Message

Team Management

Edit Team

Basic | Advanced | Method of payment

Name*: astercc | Identity*: astercc

Max Account Num*: 20 | Max Agent Num*: 20

Max Device Num*: 20 | Max Queue Num*: 20

Max MeetRoom Num*: 20 | Allow Internal Calls: Allow

Trunk Type: Trunk | Trunk: to139_2.4-rc1

Agent REC file access: CDRs & Recording | Monitor Force: Disabled

Rec Condition: All | PIN Prefix: Doubleclick to edit

Display Name: astercc | Limit Type: No Limit

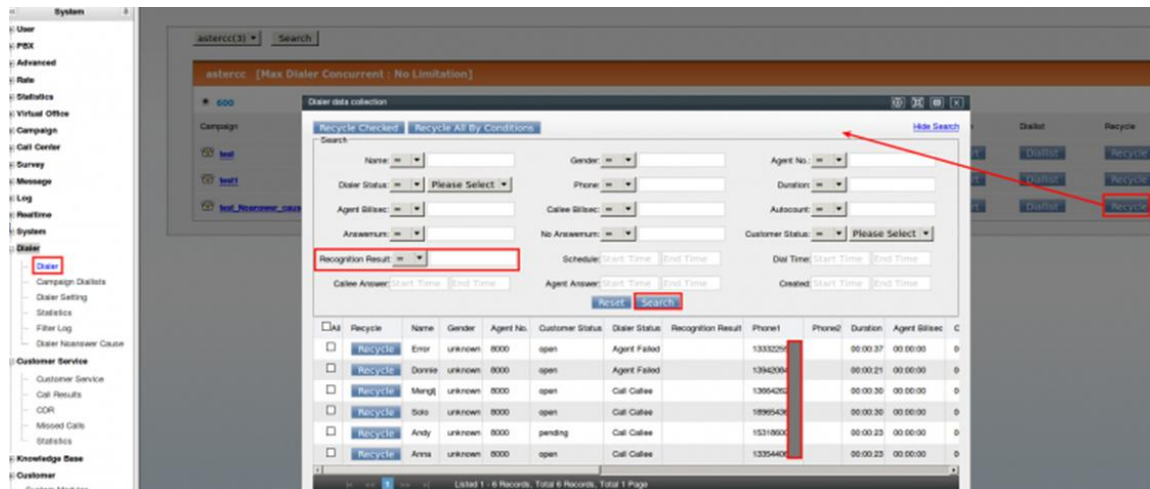
Credit Limit: 0.0000 | Logo: View Upload

Language: Doubleclick to edit

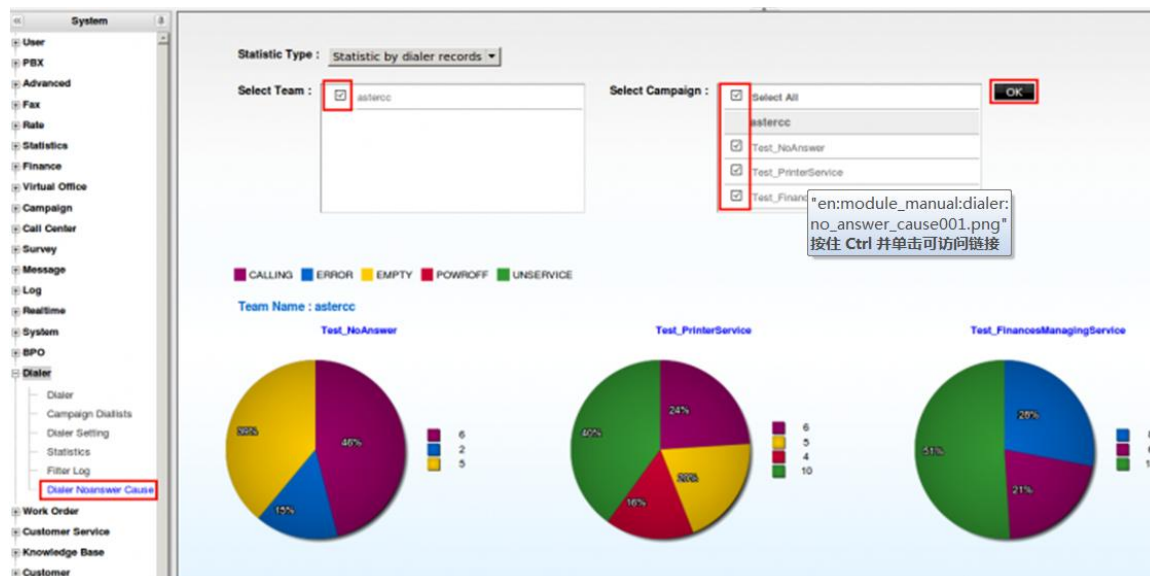
Recharge | Agents In Team | Accounts In Team | Devices In Team | Blacklist | Whitelist | Export PBX Data | Return

Predictive Dialer

We usually use the Predictive Dialer function to achieve the campaign, and we can recycle the customer data by condition, for example: Customer Status, Dialer Status, and so on. Now we also according to condition named "Recognition Result" to recycling, as following:



Click [Dialer]→[Dialer Noanswer Cause], you will enter the statistics page of Noanswer calling. You should select the team and campaign, then click the "OK" button, you can see the reason and proportion of the calling that no answered, as it shown below:



Manual Dialing

You can dial out as a device or agent, you can view Record Results of them in [PBX]→[CDRs], as following:

The screenshot shows the EQUINET VINA-PBX User Manual interface. On the left, the 'System' menu is visible with 'PBX' and 'CDR' highlighted. The main area displays a search form for call records. Below the search form, there is a table of call data with columns: Record, Download, CIDNum, Dst, Call Date, Rec Result, Model Name, and File. The table contains several rows of call records, including one with '13332255' and another with '15318600'.

18 Customer Server

18.1 Customer Server

On the left menu, please go to **[Customer Server]** -> **[Customer Server]** to open the page.

The screenshot shows the UCServer interface. On the left, the 'System' menu is visible with 'Customer Service' highlighted. The main area displays a search form for customer service records. Below the search form, there is a table of customer service data with columns: ID, Name, Memo, and E-commerce. The table contains several rows of customer service records, including one with '14' and another with '13'.

Add

Click **[Add]** to open the Add Customer Server page:

Customer Service Management

Add Customer Service

Basic

Name *:	<input type="text"/>	Status:	Enable ▾
Team:	UCServer ▾	Agent Group*:	呼入客服坐席组 ▾
PopupURL *:	dialininterfaces ▾	Default Read History:	Yes ▾
Add Customer Priority:	Only Individual ▾	E-commerce:	Please Select ▾
CIDName:	<input type="text"/>	CIDNum:	<input type="text"/>
Force CallerSetting:	No ▾	Agent PlayRecord:	No ▾
ConsultAgent IsEdit:	No ▾	Priority Call:	closed ▾
Call Hint:	Yes ▾	Memo:	<input type="text"/>

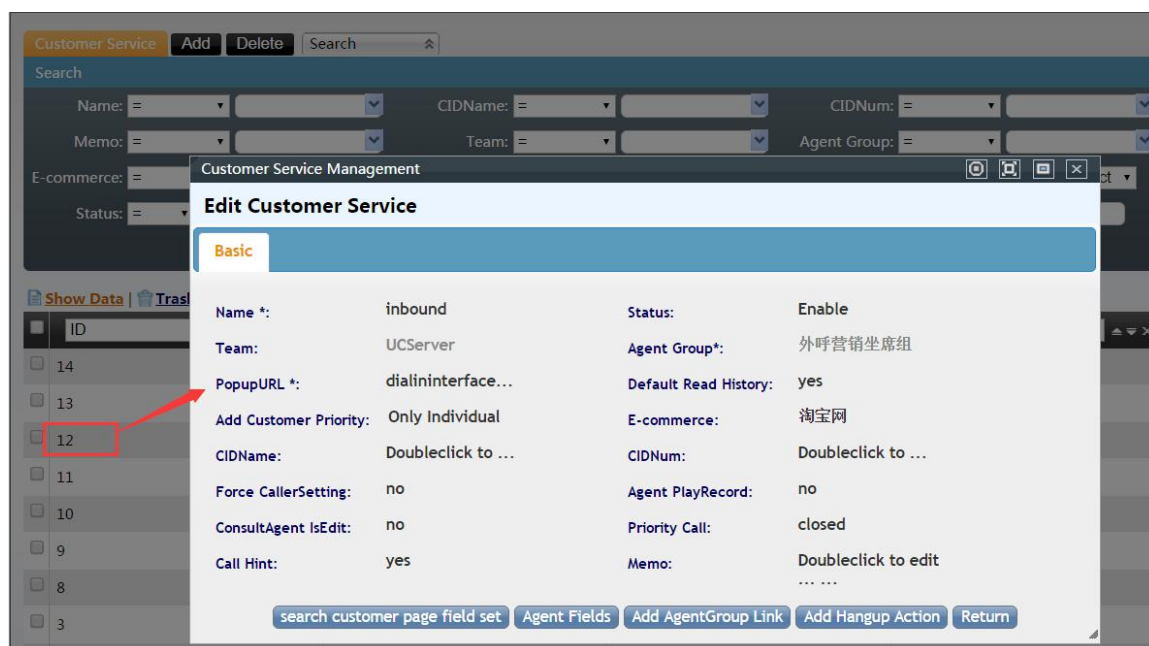
- **Name:** Name this customer server
- **Status:** Whether to enable this customer server or not;
- **Team:** Which team this customer server belongs to.
- **Agent Group:** Which agent group will server this customer server;
- **Popup URL:** The popup URL of this customer server 指定当前呼入客服来电弹屏的地址
- **Default Read History:** Whether to enable default read customer read history on Popup window or not.
- **Add Customer Priority:**
 - Only Individual: Only can be saved as individual;
 - Individual Priority : Set individual as default setting, but can swift to organization customer data on the page and save as organization if needed.
 - Only Organization : Only can be saved as organization;
 - Organization Priority: Set organization as default setting, but can swift to individual customer data on the page and save as individual if needed.
- **E-Commerce:** Select an E-commerce for incoming agents;
- **CID Name:** The CID name of this customer server;
- **CID Num:** The CID number of this customer server;
- **Force Call Setting:** Whether to use the setted CID name and CID number forcely or not;
- **Agent Play Record:** Whether the agent can play record or not;
- **Consult Agent is Edit:** Whether the agent can edit customer data or not;
- **Priority Call:** To closed priority call; Incoming calls to current agent or last contact agent
- Closed : To disable priority call

- Current agent : Incoming calls to current agent;
- Last contact agent:Incoming calls to last contact agent;
- **Call Hint:** Whether to enable call hint or not;
- **Memo:**To give a memo to this customer server;

After finished the data,you can click the [Save] button to save the data.Then you can see the data shown in the list.

Edit

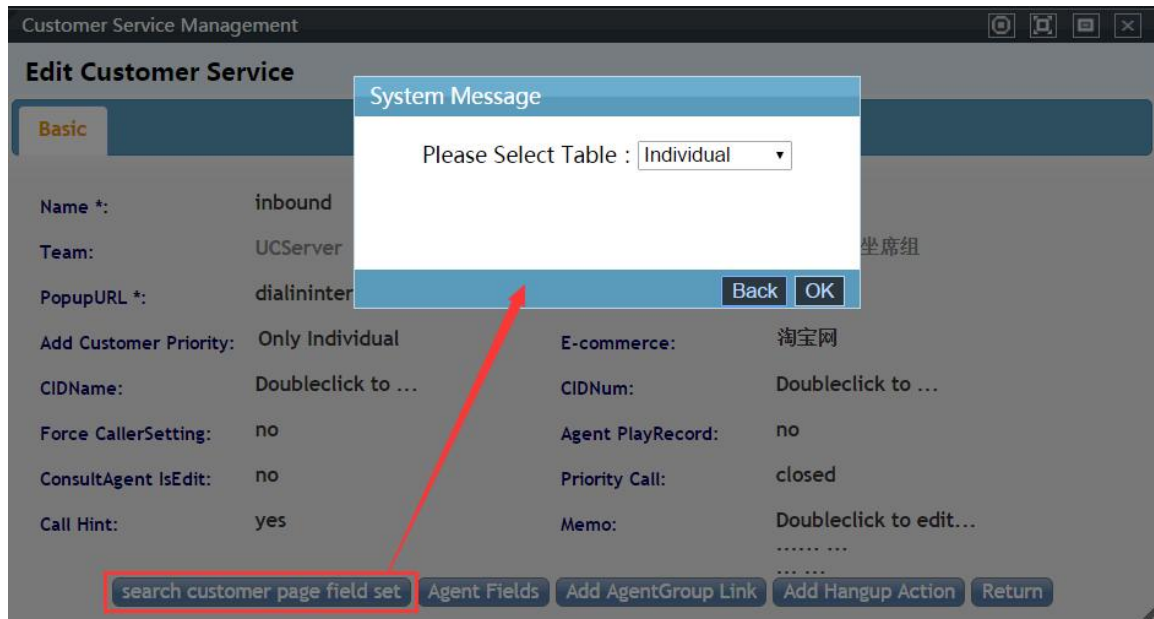
Double click the data,can open the edit page,then update the data.



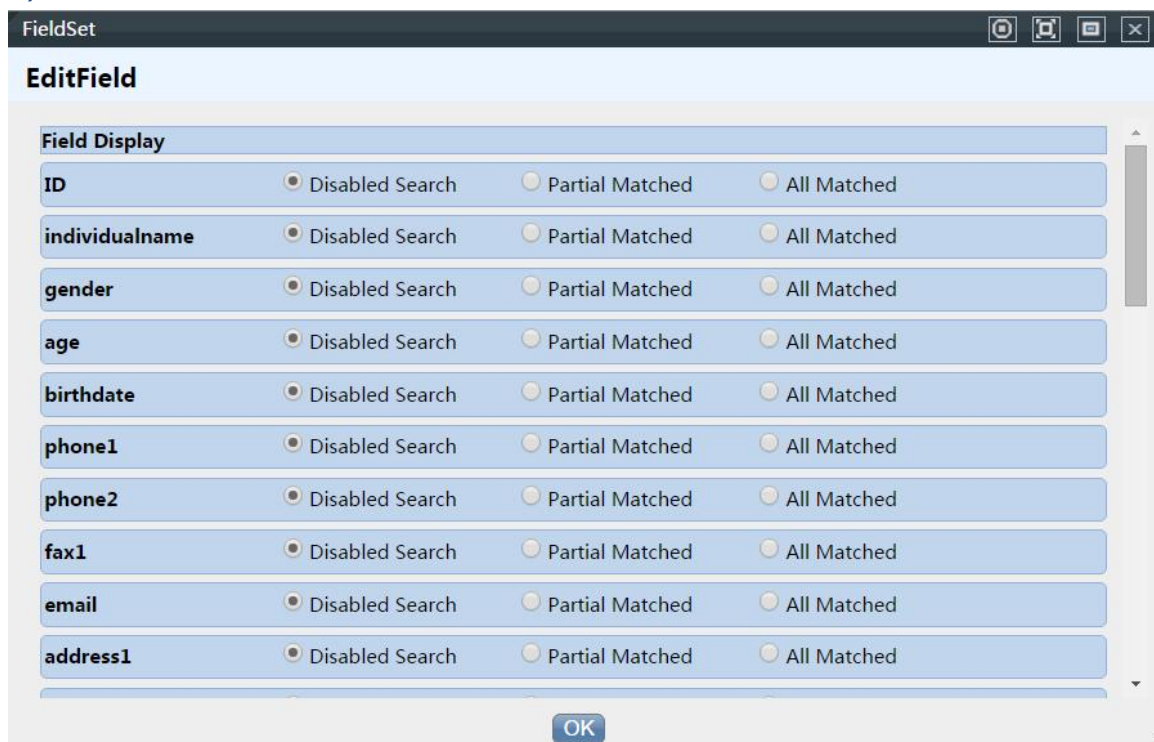
Search Customer Page Field Set

Click **Search customer page field set** to open this customer server's search customer page,and set privilege on the fields.

A) Select a table firstly:



B) Select the individual table to edit the field:



- **Disable Search:** This field will not on customer search page;
- **Partial Matched:** This field will on customer search page,and it is partial matched;
- **All Matched:** This field will on customer search page,and it is all matched;

Agent Field

Click **【Agent Field】** to set popup window field: view,edit and required;

A) Select a table firstly:

support team.

AgentGroup LinkUrl Management

Add AgentGroup Link

Basic

Name *: Agent Group: strong-test Link Url: custompages

Team: Call Result: Default Call Result

PopupURL *: OK Return

Service Name	Link Url	Agent Group	Call Result	Delete
inbound	custompages	strong-test	Default Call Re...	Delete
inbound	custompages	呼入客服坐席组	Default Call Re...	Delete

search customer page field set Agent Fields **Add AgentGroup Link** Add Hangup Action Return

- **Agent Group:** Select an agent group;
- **Link Url:** Select a link URL for this agent group;
- **Call Result:** This can be set under Call Result. You can set different key pressing according to different call result on the IVR.

Add Hungup Action

Click **【Add Hungup Action】** to open the bellow page.

Customer Service Management

Edit Customer Service

Hangup Action Management

Add Hangup Action

Basic

Target: Agent Answered Type: Sms

Template: Please Select

Save Back

Target	Type	Template	Creby	Created	Delete
--------	------	----------	-------	---------	--------

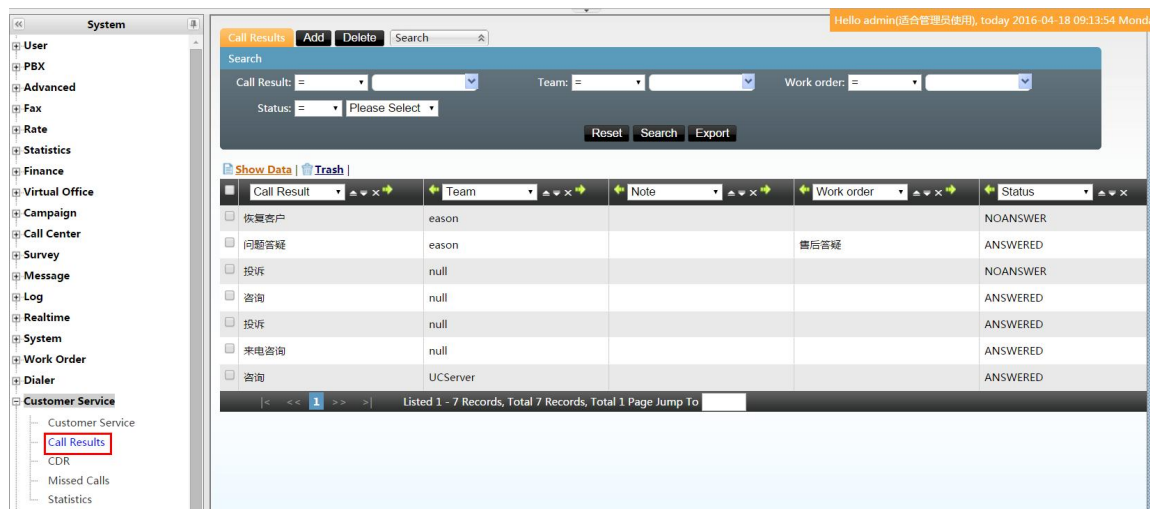
Call Hint: yes Memo: Double click to edit...

search customer page field set Agent Fields Add AgentGroup Link **Add Hangup Action** Return

- **Target:** Select a target, is hangup after agent answered or when agent no answered.
- **Type:** Which kind of action to take, send sms or email.
- **Template:** Select a template for this action.

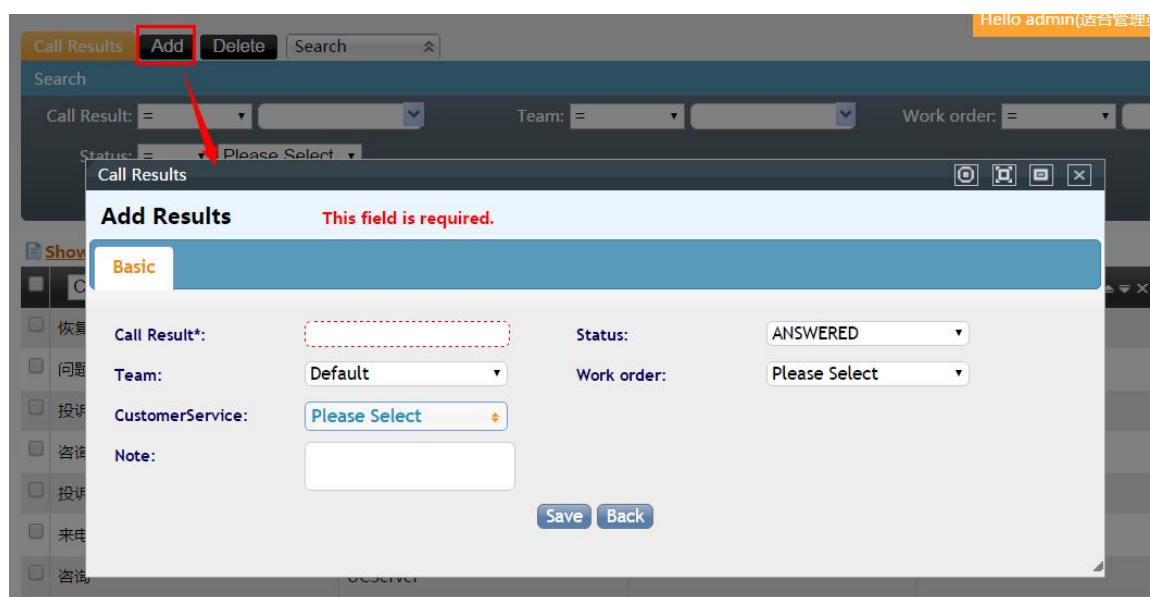
18.2 Call Result

On the left menu, please go to [Customer Server] -> [Call Result] to open the page.



Add

Click "Add" to open the add result page:



- **Call Result:** Give a name to this call result;
- **Status:** Whether answer or not answer;
- **Team:** Which team this call result belongs to;
- **Work Order:** Which call order to use;
- **Customer Server:** Which customer server to use this call result;
- **Note:** Give a note to this call result;

After finished the data, you can click the [Save] button to save the data. Then you can see the data shown in the list.

Edit

Double click the data,can open the edit page,then update the data.

18.3CRD

On the left menu, please go to[**Customer Server**]-> [**CRD**] to open the page.

On the data list:

- The red data are incoming calls which agent failed to answer;
- The green data are outgoing calls which customers no answered;

Click  to listen to the recordings online while click  to download the recording;

18.4Missed Calls

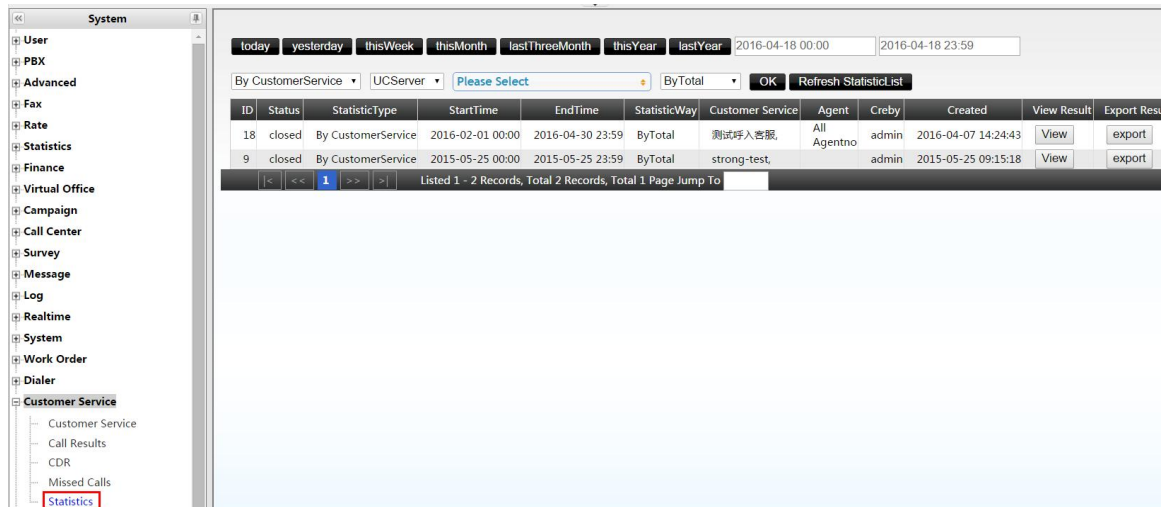
On the left menu, please go to[**Customer Server**]-> [**Missed Calls**] to open the page.

On the data list:

- The red data are missed calls no requiring visit;
- The green data are missed calls applying visit;

18.5 Statistics

On the left menu, please go to [Customer Server] -> [Statistics] to open the page.

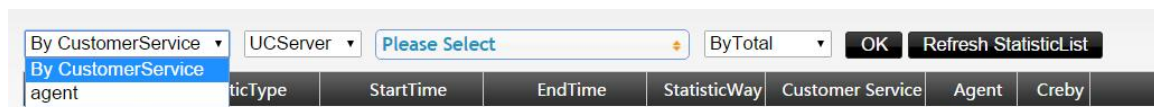


1) Select the statistic time range:

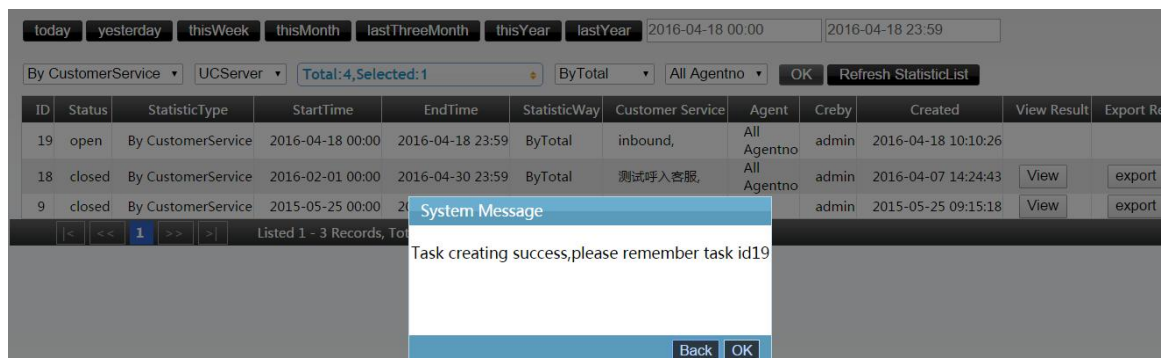


2) Select how to show this statistic, by customer service or by agent;

3) Select a team and its agents which will show later



4) After finishing, click OK button, a window will popup:



A new statistic task is taking care by the background now. When the task closed, you can view, export the task. Click view, the detail statistic will show:

ID	Status	StatisticType	StartTime	EndTime	StatisticWay	Customer Service	Agent	Creby	Created	View Result	Export Resu
19	open	By CustomerService	2016-04-18 00:00	2016-04-18 23:59	ByTotal	inbound,	All Agentno	admin	2016-04-18 10:10:26		
18	closed	By CustomerService	2016-02-01 00:00	2016-04-30 23:59	ByTotal	测试呼入客服,	All Agentno	admin	2016-04-07 14:24:43	View	export
9	closed	By CustomerService	2015-05-25 00:00	2015-05-25 23:59	ByTotal	strong-test,		admin	2015-05-25 09:15:18	View	export
Listed 1 - 3 Records, Total 3 Records, Total 1 Page Jump To											
时间段	呼入客服	坐席工号	姓名	呼入次数	呼入接通次数	呼入接通率	呼入总时长	呼入通话时长	呼出次数	呼出接通次数	呼出接通率
2016-02-01 00:00 -- 2016-04-30 23:59	测试呼入客服	2860	2860	0	0	0	00:00:00	00:00:00	1	0	0
2016-02-01 00:00 -- 2016-04-30 23:59	测试呼入客服	2866	strong	0	0	0	00:00:00	00:00:00	0	0	0
2016-02-01 00:00 -- 2016-04-30 23:59			总计	0	0	0	00:00:00	00:00:00	1	0	0
Listed 1 - 3 Records, Total 3 Records, Total 1 Page Jump To											

19 Knowledge Base

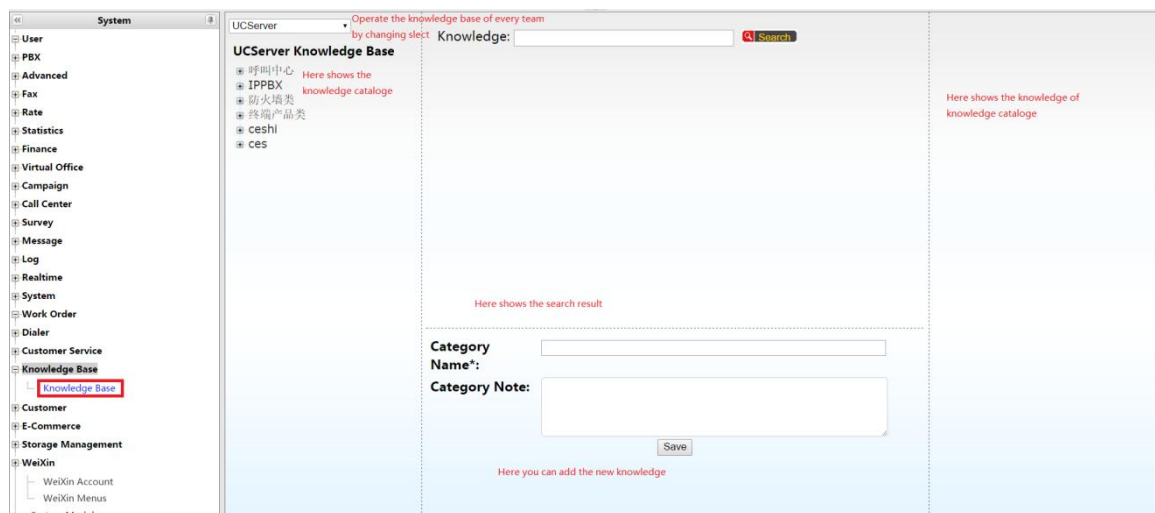
The function of knowledge base

The function of knowledge base is:

- agents can share their knowledge of products and experiences.
- save agents' time to learn, and avoid repeating work
- reduce the pressure of agents
- the turnover of this industry is fast, new agents can handle the knowledge easier.
- increase the satisfaction of the employer company.

Add Knowledge Category

On the leftmenu,[Knowledgebase] → [Knowledgebase],open the page,like this:



Change the select on the left top of page,choose the team to save the knowledge for it
As above picture,click 'astercc Knowledge Base' to add the first knowledge category
After finished adding a new category,click the save button.If save success,it will be shown on the left



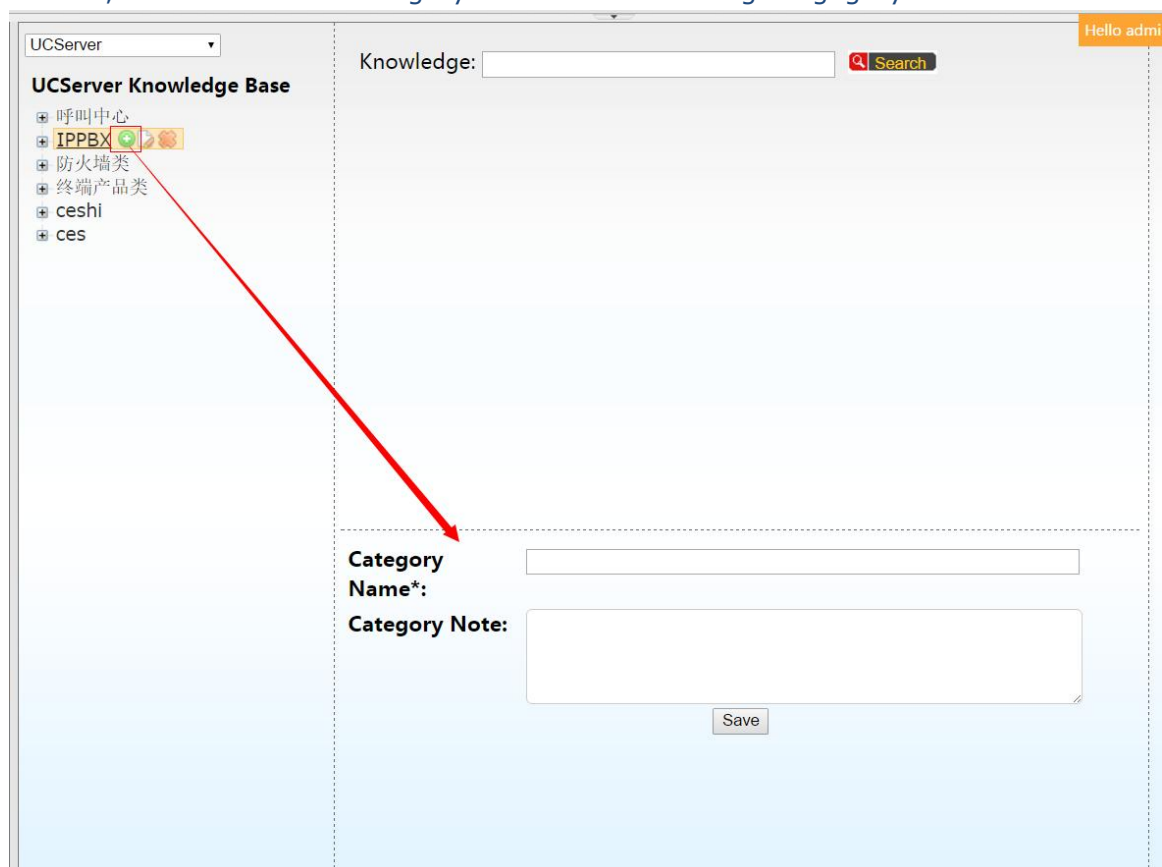
If you want to add more the same level knowledge category,please click ' Knowledge Base' to add

Click the knowledge category,like this:

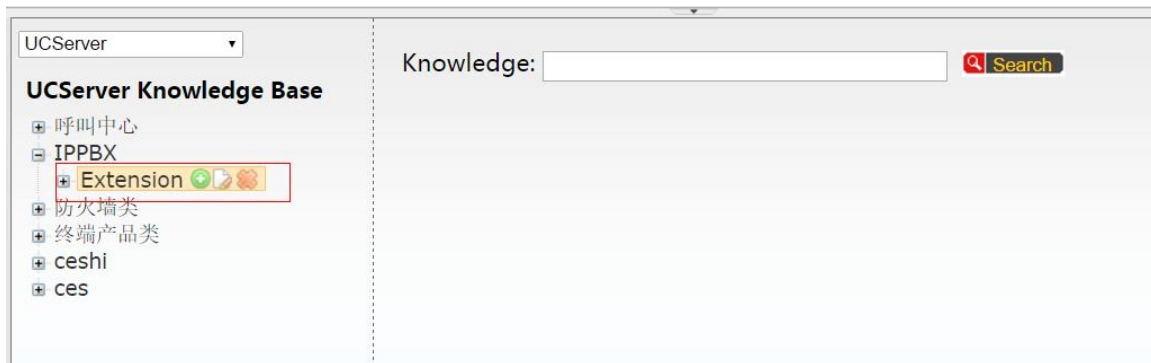


Three picture appear after the knowledge category name,besides   

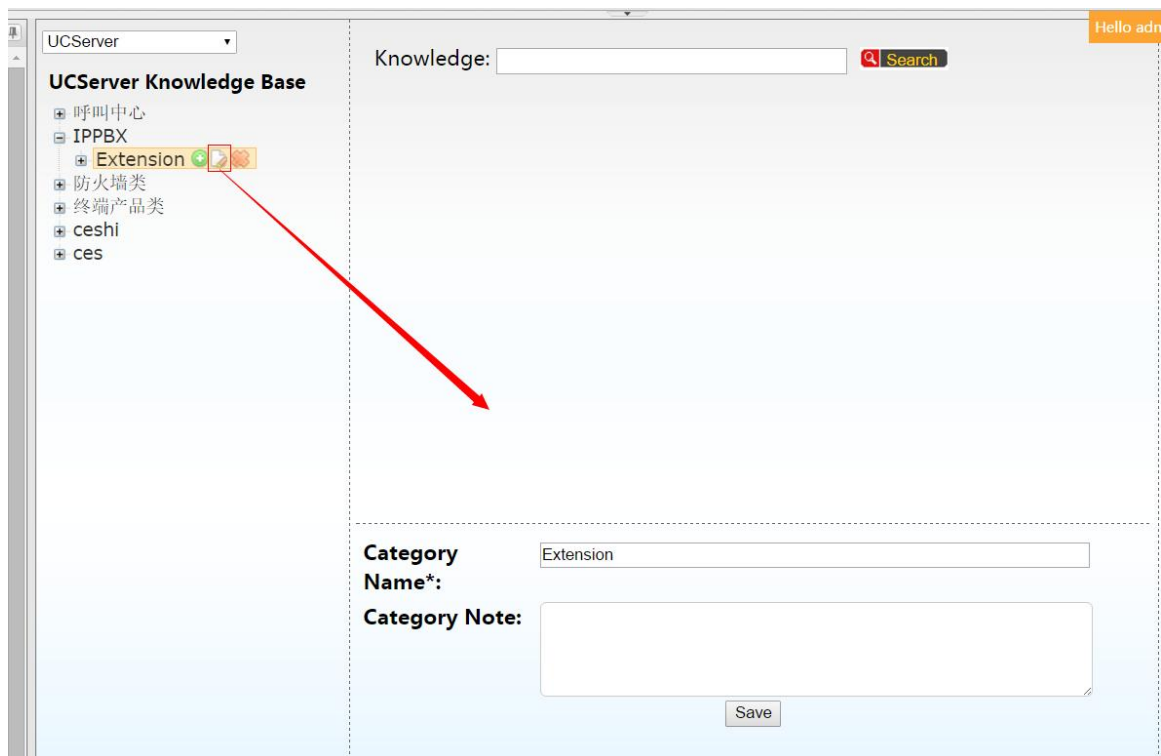
Click ,can save the sub category for current knowledge categyory



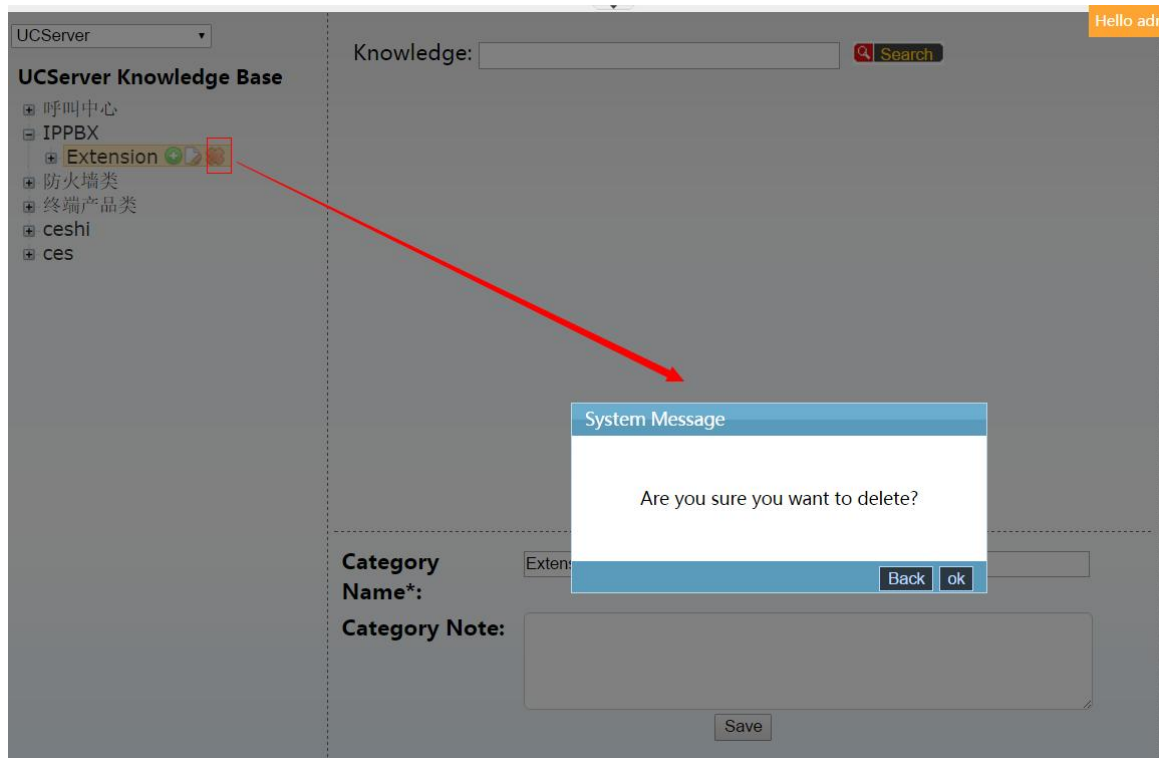
After finished,click save to the sub category,it will be shown on the left under the parent category,like this:



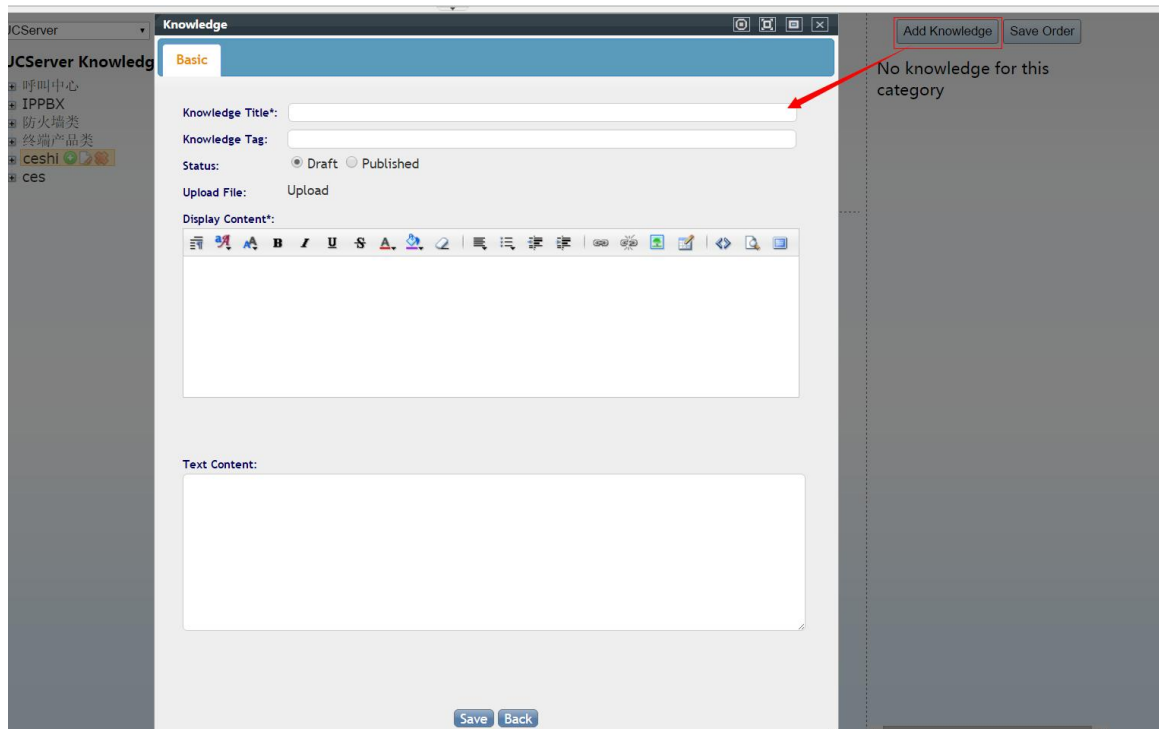
Click  to edit the category



Click  to delete the category

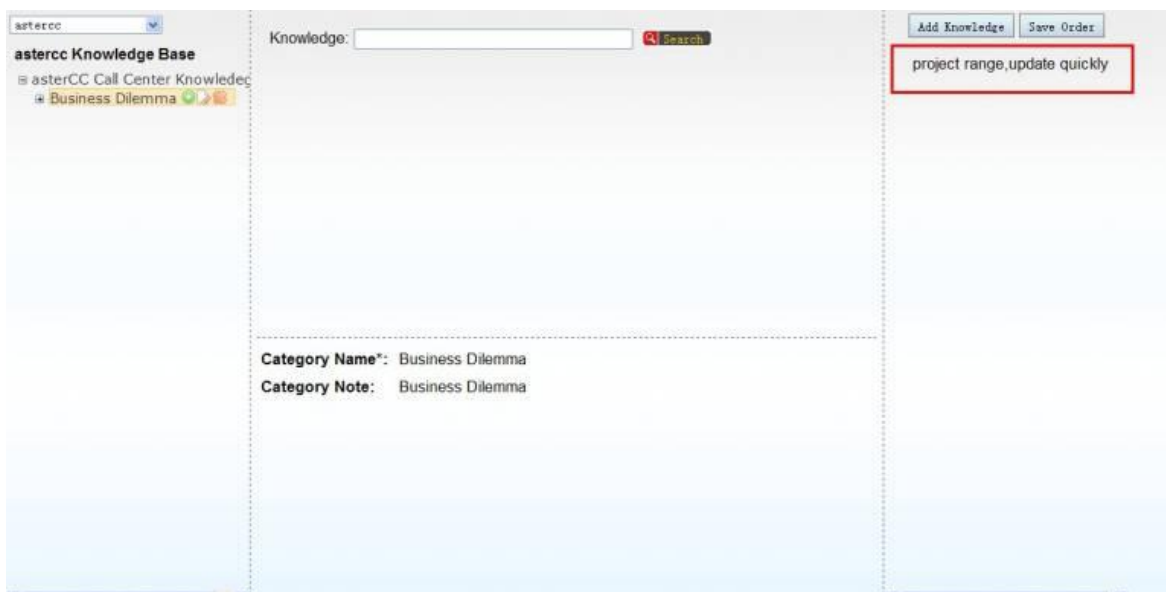


Click one category,you can click the add knowledge button to save the knowledge for the category



- Knowledge Title : The knowledge name to briefly describe the knowledge
- Knowledge Tag: Add knowledge tag, it will quickly search the knowledge. Split multiple tags with spaces.
- Status: The knowledge's status

- Draft : Just can see the knowledge created by myself,others can not see this knowledge
- Published : The knowledge can be saw by others who has the privilege of view the knowledge
- Pending Approval : The current dosesn't have the release privilege,when create the knowledge,it's not really published.It need to be audit by the account which has the release privilege.If audit success,the privilege will be published.
- Reject :the knowledge doesn't audit success
- Upload File : upload some file,so others can download the file and view the message
- Display Content : can fill some formatted text,so the content will be shown clearly
- Text Content : the same with the `Display Content`,but it doesn't have layout format.When you need to search the knowledge,it will be use this field to search After finished,click the [Save] button to save the knowledge.If save success,it will be shown on the right and open a new page to show the detail of the knowledge at the same time.



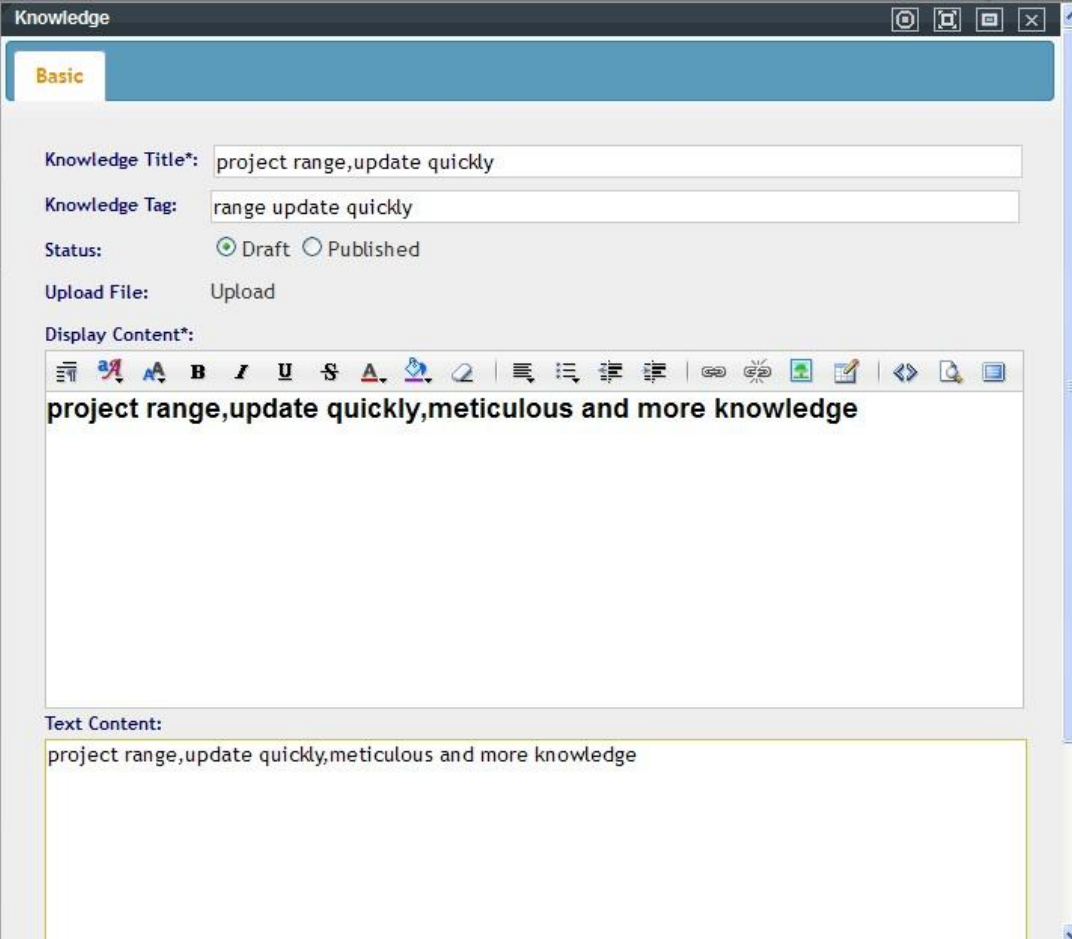
The screenshot shows the 'astercc Knowledge Base' interface. On the left, there's a sidebar with 'asterCC Call Center Knowledge' and 'Business Dilemma'. The main area has a 'Knowledge:' input field with a search icon. Below it, 'Category Name*' is set to 'Business Dilemma' and 'Category Note' is 'Business Dilemma'. On the right, there are 'Add Knowledge' and 'Save Order' buttons. A red box highlights the text 'project range,update quickly' in the knowledge content area.

Knowledge Other Information			
Knowledge Title:	project range,update quickly		
Knowledge Tag:	range,update,quickly		
Status:	Draft	Upload File:	<No upload file>

Knowledge Content	
project range,update quickly,meticulous and more knowledge	

Mouse over the knowledge name,it will change color to blue and two picture button will appear after the knowledge name

Click button,will see



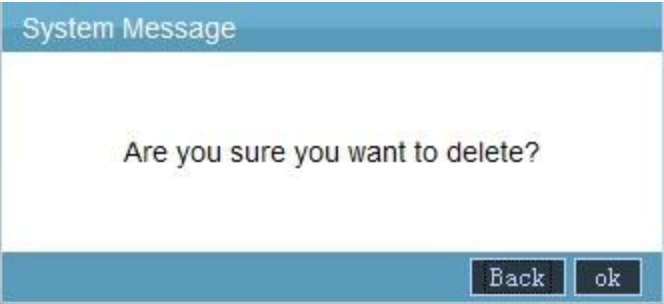
The screenshot shows a web application window titled "Knowledge". It has a "Basic" tab selected. The form contains the following fields:

- Knowledge Title*:** project range,update quickly
- Knowledge Tag:** range update quickly
- Status:** ☒ Draft ☐ Published
- Upload File:** Upload
- Display Content*:** A rich text editor with a toolbar. The content is "project range,update quickly,meticulous and more knowledge".
- Text Content:** A plain text area containing the same text as the rich text editor.

On this page,can update the content of the knowledge

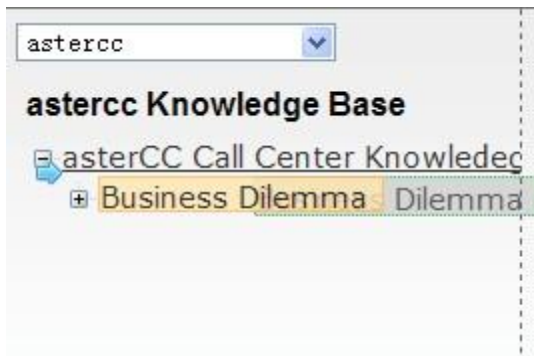
Click one knowledge name,will open a new page to show the knowledge detail

Click will popup a prompt box.If click ok,will delete the knowledge



The screenshot shows a "System Message" dialog box with the text "Are you sure you want to delete?". At the bottom, there are two buttons: "Back" and "ok".

If want to order the knowledge category or knowledge,can drag one and move it to the appropriate location,like this:



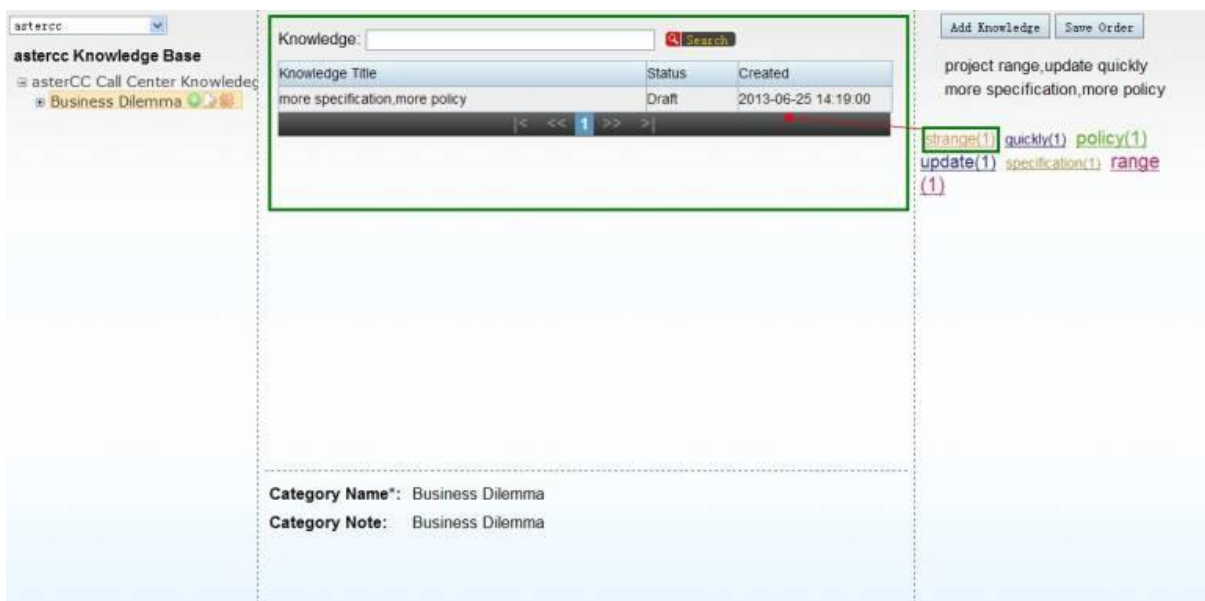
Drag the knowledge category to the appropriate location, then release the left mouse button, it will save the new order

Order the knowledge is the same with the knowledge category



Search Knowledge

On the right bottom of page show the knowledge base's tag, like :



Click one tag, will search and show the knowledge related with the tag on the middle top of page. The tag will quickly help you search the knowledge.

And you can search the knowledge by the search box. Fill in the message, then click search, then will show the knowledge matched with the search message, displayed in the list

Knowledge: Search

Knowledge Title	Status	Created
project range, update quickly	Draft	2013-06-25 14:09:27
more specification, more policy	Draft	2013-06-25 14:19:00

< << 1 >> >

Control the knowledge page by the role

Knowledgebase page can be controlled by the role, can control the account's privilege

Open [User] -> [Role] page, to create or edit one role, click the [Privileges Setting] button to open the privilege setting page, find the Knowledge Base page, like:


Privileges Setting

Individuals	<input type="checkbox"/> Select All	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Export
Organization	<input type="checkbox"/> Select All	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Export
Individual Customer Tag	<input type="checkbox"/> Select All	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Export
Organization Customer Tag	<input type="checkbox"/> Select All	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Export
Contact Log	<input type="checkbox"/> Select All			<input type="checkbox"/> View		<input type="checkbox"/> Export
Customer Field	<input type="checkbox"/> Select All			<input type="checkbox"/> View		
- Knowledge Base						
Knowledge Base	<input type="checkbox"/> Select All	<input type="checkbox"/> Add Categories <input type="checkbox"/> Add Knowledges	<input type="checkbox"/> Edit	<input type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Release
- E-Commerce						
E-Commerce	<input type="checkbox"/> Select All	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Export
Products	<input type="checkbox"/> Select All	<input type="checkbox"/> Add	<input type="checkbox"/> Edit	<input type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Export

Cancel OK

Can see the privilege of the knowledge base page

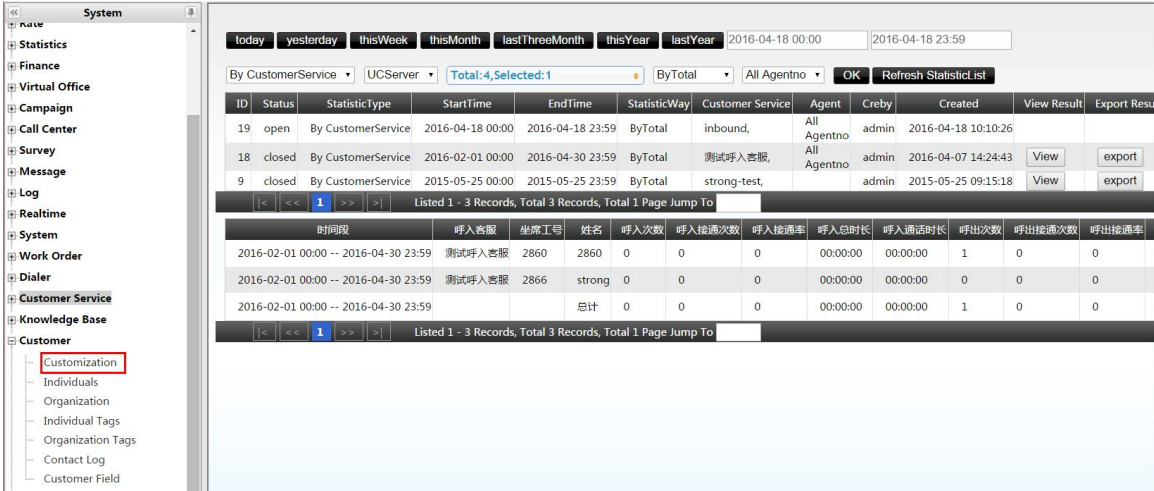
- **Add Categories** : whether the role will have the privilege to add knowledge category. If not checked, can not add knowledge category, and click one knowledge category, can not see the button after the knowledge name.
- **Add Knowledges** : whether the role will have the privilege to add knowledge. If not checked, can not see the add knowledge button on the right
- **Edit** : whether the role will have the privilege to edit the knowledge category or knowledge. If not checked, click the knowledge category or knowledge, will not see the button and can not order at the same time

- View : whether the role will have the privilege to view the page.If not checked, the role's account will not see the knowledgebase page
- Delete : whether the role will have the privilege to delete knowledge category or knowledge.If not checked,can not delete the knowledge category or knowledge,can not see the 
- Release : whether the role will have the privilege to publish the knowledge.Just the account's role have this privilege will publish the knowledge and audit others' knowledge which the status is `Pending Approval`.The published knowledge just can be used by each other;if not check this privilege,when you add a new knowledge and choose status to publish,then it will be needed to audit.

20 Customer

20.1 Customization

On the left menu, please go to[Customer]-> [Customization] to open the page.



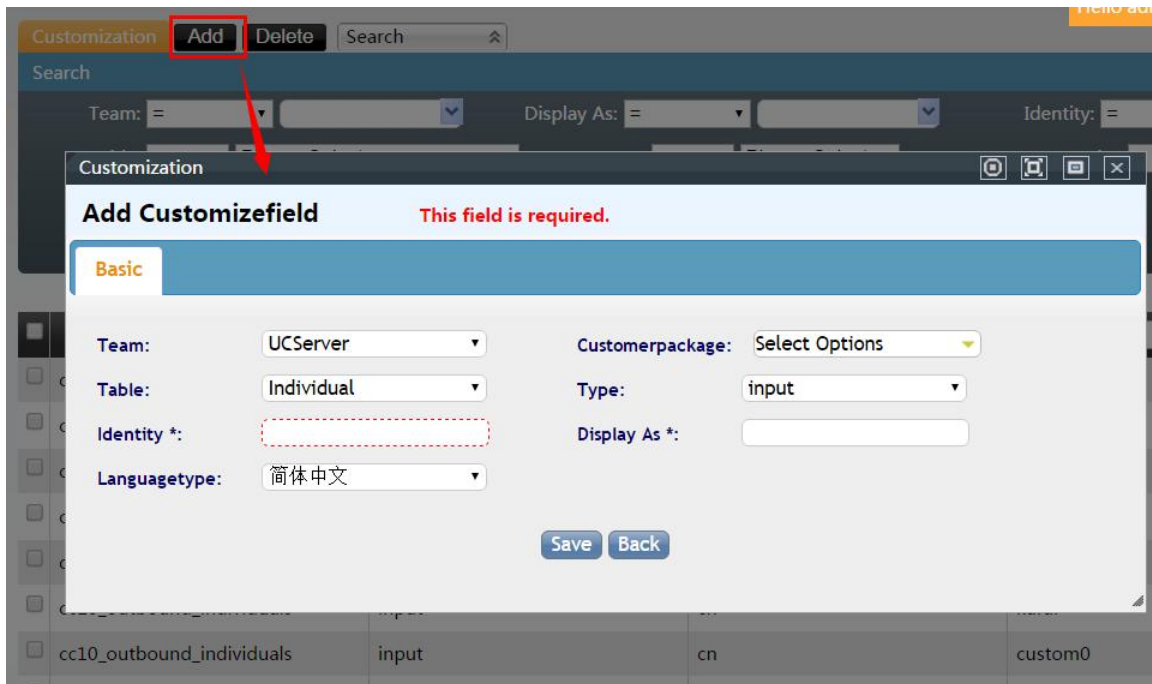
ID	Status	StatisticType	StartTime	EndTime	StatisticWay	Customer Service	Agent	Creby	Created	View Result	Export Result
19	open	By CustomerService	2016-04-18 00:00	2016-04-18 23:59	ByTotal	inbound,	All Agentno	admin	2016-04-18 10:10:26		
18	closed	By CustomerService	2016-02-01 00:00	2016-04-30 23:59	ByTotal	测试呼入客服,	All Agentno	admin	2016-04-07 14:24:43	View	export
9	closed	By CustomerService	2015-05-25 00:00	2015-05-25 23:59	ByTotal	strong-test,	admin	admin	2015-05-25 09:15:18	View	export

时间段	呼入客服	坐席工号	姓名	呼入次数	呼入接通次数	呼入接通率	呼入总时长	呼入通话时长	呼出次数	呼出接通次数	呼出接通率
2016-02-01 00:00 -- 2016-04-30 23:59	测试呼入客服	2860	2860	0	0	0	00:00:00	00:00:00	1	0	0
2016-02-01 00:00 -- 2016-04-30 23:59	测试呼入客服	2866	strong	0	0	0	00:00:00	00:00:00	0	0	0
2016-02-01 00:00 -- 2016-04-30 23:59			总计	0	0	0	00:00:00	00:00:00	1	0	0

Module Function:

- To add new customer fields, we can go to Customer → Customization to add or edit customer information
- In this page, we can customize individual or organization main table, or individual customer package
- You can also edit/delete/export customized fields

Add



- Team: mandatory, you need to select which team you want to add this field to
- Table:
- Individual: customer package type is individual
- Organization: customer package type is organization
- Customer Package:
- select if you only want to add this field to specific customer package
- if you don't select any customer package, this field will be add to main customer package and all new customer packages.

FAQ: I have a package A, now I want to add a new field "level" into it, and I want system create this field for all new packages, in this case, we need to create two customization



1st, we select package A, add a "level" field

2nd, we don't select any package, add a "level" field, so all new packages have this field

- Type
- Input: for shot information
- select: drop down menu
- Select Can Enter: When the type is select, besides select from drop down menu, if it's allowed to enter information

Nation:

- Selectoption: When the type is select, you can put user selection, separated with comma ,

Gender: unknown

OutboundIndividual-fillstt: my fill

option1

option2

option3

Back

- integer: integer number
- text: for memo

Memo:

- upload: for upload files, images

photo: Upload

- date: year, month and day

date: 2013-05-23

OutboundIndividual

May 2013

week	Mon	Tue	Wed	Thu	Fri	Sat	Sun
18			1	2	3	4	5
19	6	7	8	9	10	11	12
20	13	14	15	16	17	18	19
21	20	21	22	23	24	25	26
22	27	28	29	30	31		

Thursday, 23. May 2013

00 00

- datetime: year, month, day, hour, minute and second

datetime: 2013-05-23 12:43

Out

May 2013

week	Mon	Tue	Wed	Thu	Fri	Sat	Sun
18			1	2	3	4	5
19	6	7	8	9	10	11	12
20	13	14	15	16	17	18	19
21	20	21	22	23	24	25	26
22	27	28	29	30	31		

Thursday, 23. May 2013

12 43

- relate: for country/province/city

Province: please select

City*: please select

district: please select

office: please select

- Identity: need to be unique in the package and english letters only, will be used as column name for database
- Display As: what we will see

How to use relate field

- Let's say you want to add relationship field for country, province and city
- first we need to put three fields name into Identity, separated with comma(,)

Identity *: province,city,district

- put three Display As, separated with comma(,)

Display As *: province,city,district

- select input method for relate field
- textarea: you can put the data from the page
- upload: you can upload a txt file which include all information

Selectoption:

☒ By Textarea

LiaoNing,ShenYang,HuangGu;LiaoNing,ShenYang,DaDong;LiaoNing,DaLian,ZhongShan;LiaoNing,DaLian,XiGang;BeiJing,BeiJing,HaiDian;BeiJing,BeiJing,ChaoYang;

Province, City, District; Province, City, District; Province, City, District;

☐ By Upload TXT File

Selectoption: ☐ By Textarea ☒ By Upload TXT File

Upload

Just support txt file to upload!

relate.txt - 记事本

文件(F) 编辑(E) 格式(O) 查看(V) 帮助(H)

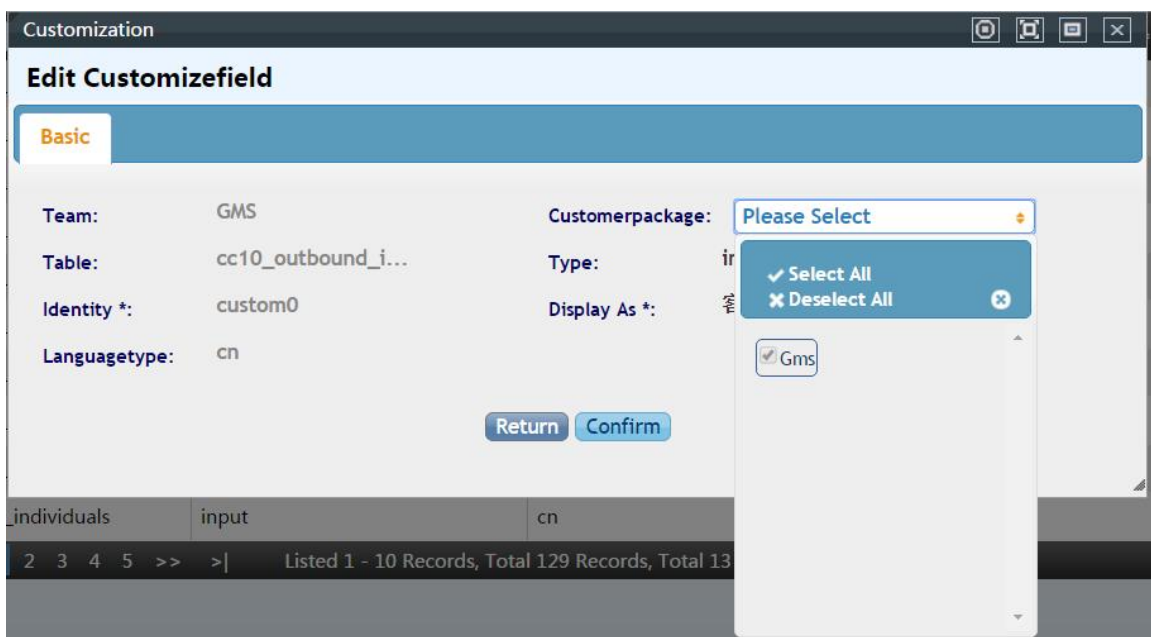
LiaoNing,ShenYang,HuangGu;
LiaoNing,ShenYang,DaDong;
LiaoNing,DaLian,ZhongShan;
LiaoNing,DaLian,XiGang;
BeiJing,BeiJing,HaiDian;
BeiJing,BeiJing,ChaoYang;

Edit

- Double click to open a customization record



- When the field is grey, means it's not editable



- If you didn't select any customer package when you created, you are not allowed to change this
- If you select customer packages, when you edit, you are only allowed to add more customer package, and you are not allowed to de-select

Customization

Edit Customizelfield

Basic

Team: GMS Customerpackage: Total: 1, Selected: 1

Table: cc10_outbound_i... Type: select

Identity *: custom0 Display As *: 客户名名称

Language type: cn Select Can Enter: No

Selection:
 e.g.: China, Korea, Japan

[Return](#) [Confirm](#) [Confirm](#)

- When type is input or select, you can change it to select or input

Display

- For customer service module, you can go to Customer → Custom Fields to adjust display order, hide a field or change user permission

Statistics

Finance

Virtual Office

Campaign

Call Center

Survey

Message

Log

Realtime

System

Work Order

Dialer

Customer Service

Knowledge Base

Customer

- Customization
- Individuals
- Organization
- Individual Tags
- Organization Tags
- Contact Log
- Customer Field

E-Commerce

Storage Management

WeiXin

- System Modules

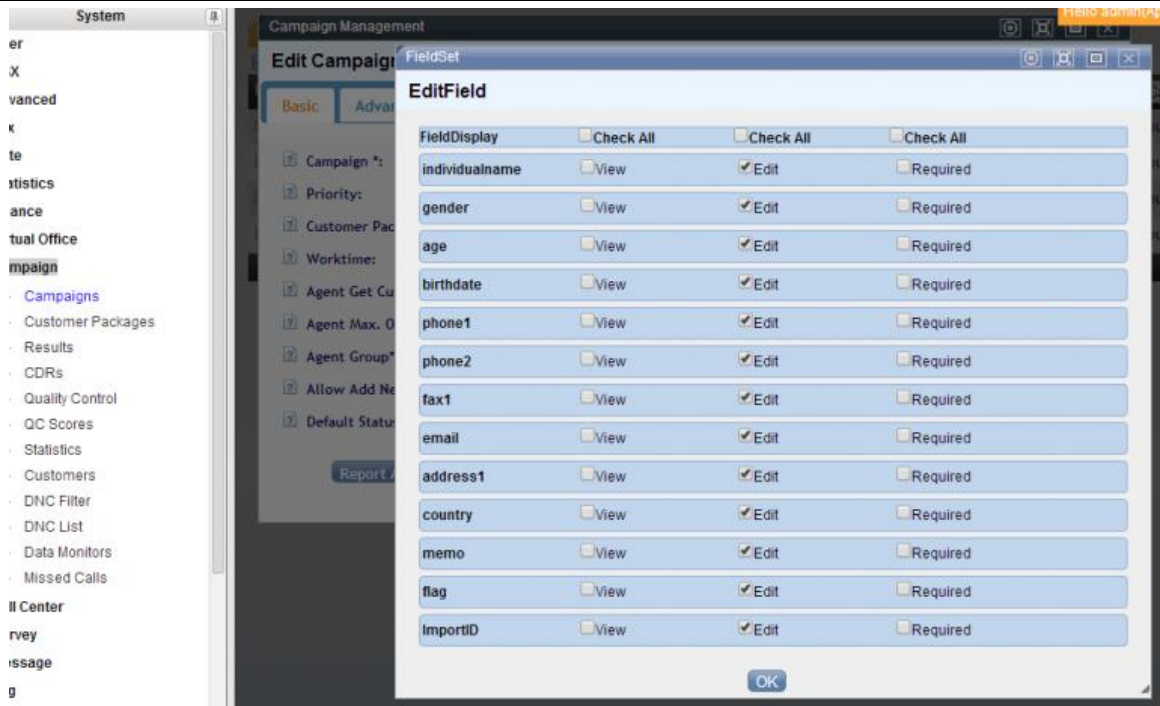
Customer Field

TeamUCServer

TypeIndividual

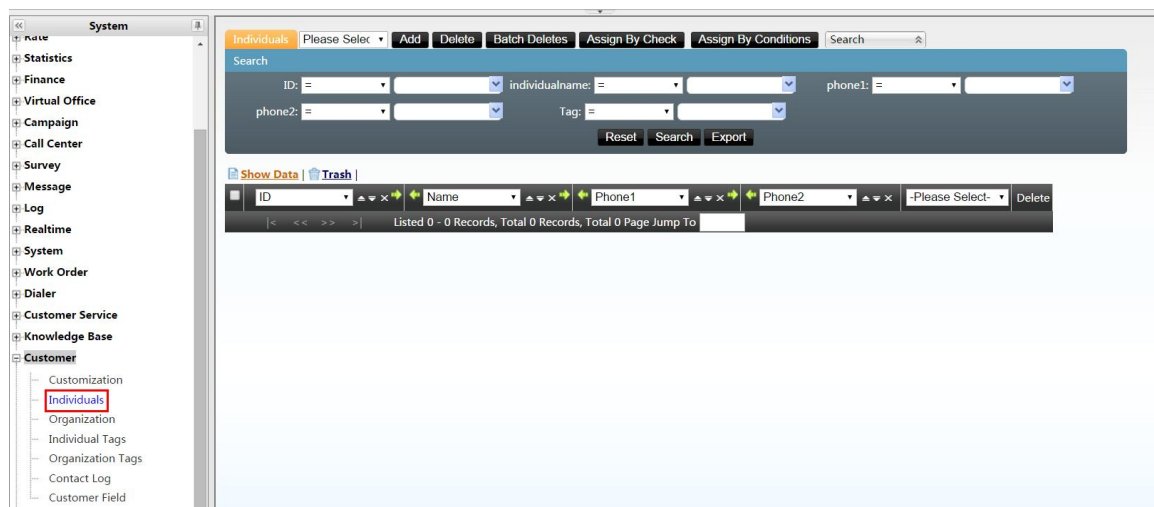
Field Display	<input type="checkbox"/> Check All	<input type="checkbox"/> Check All	<input type="checkbox"/> Check All
ID	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Name	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Required
Gender	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Age	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Birthday	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Phone1	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Required
Phone2	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Fax1	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Email	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Address1	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Country	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Last Contact ID	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Memo	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
ImportID	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Creby	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Bind Customer ID	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required

- For campaigns, you can go to Campaign → Campaign, background field and agent field to change



20.2 Individuals

On the left menu, please go to **[Customer]** -> **[Individuals]** to open the page.



Module Funtion: It is for managing individual customer list. When create a team, the system will create an individual customer list and an organization customer list. The list can be used for customer server and customer campaign.

The search fields, title, add field and edit field are all defined by **[Customer Field]**

Data Source

1. Bulk adding from **[Call Center]** -> **[Import]**:

Import directly to individual customer list;

Import through individual customer package

2. Add through **[Customer]** -> **[Individual]**

- 3.Add by agent after finishing a call;
- 4.Add through [**Campaigns**] →[**Customers**]

Add

Name: Name this Individual

Age, Birthday: Fill one field, the other will be filled automatically, eg, if put birthday =1980-01-01, the system will calculate Age=2016-1980=36;

Blacklist: If choose "Yes", then the numbers filled will be added to Advanced->Blacklist. These numbers can not be call in to the system. We suggest if setting Yes for blacklist, please also fill Blacklist Reason field (Please add Blacklist Reason field under Customer->Customization)

Current Package: Which customer package this customer will belong to. One customer can only belong to one customer package.

Tag: Click  to add a tag for a customer. The available tag are setted under [Customer]->[Individual Tags].

Enterprise: To link Individual customer to Organization customer. Means this customer also blong to this organization. Only organizations within the same team are available.

Select Organization

ID: Name: Legalrepresentative:

Search

ID	Name	Legalrepresentative	Organizationtype	Headquartersaddress
1682	Guop	unknown	unknown	
1679	YuanS	unknown	unknown	

Navigation: |< << 100 101 102 103 104 >> >|

Back

Customize Enterprise: Click Select Organization Enname:

Quick Search

Quick search, it is like you click a quick link, then the system fill all fields automatically and press search button. It is designed for deducing steps for search.

Customer Tag: Click a customer tag to quick search customers belong to this tag.

creby: = flag: = BlackList: = Please Select

Tag: match | BlackList

birthdate: Start Time End Time

created: Start Time End Time LastContactDate: Start Time End Time

updated: Start Time End Time

Reset Search Export xls file

Customer Tag: Empty [DNC](#) **BlackList** [potential customer](#) [Test](#) [new customer](#) [Platinum](#)

[member](#) [Diamond member](#)

Customer Package: To search customers belong to this package.

[member](#) [Diamond member](#)

Customer Package: **All** [UnAssign](#) [MMJU](#) [SOkwL](#) [Test Pack](#)

region assign: According to the selected customer assign to center LiaoNing -Please Select-

individualname phone1 province

1.1 Batch Delete

To batch delete customers according to search result. If not select any conditions, it will delete all customers.



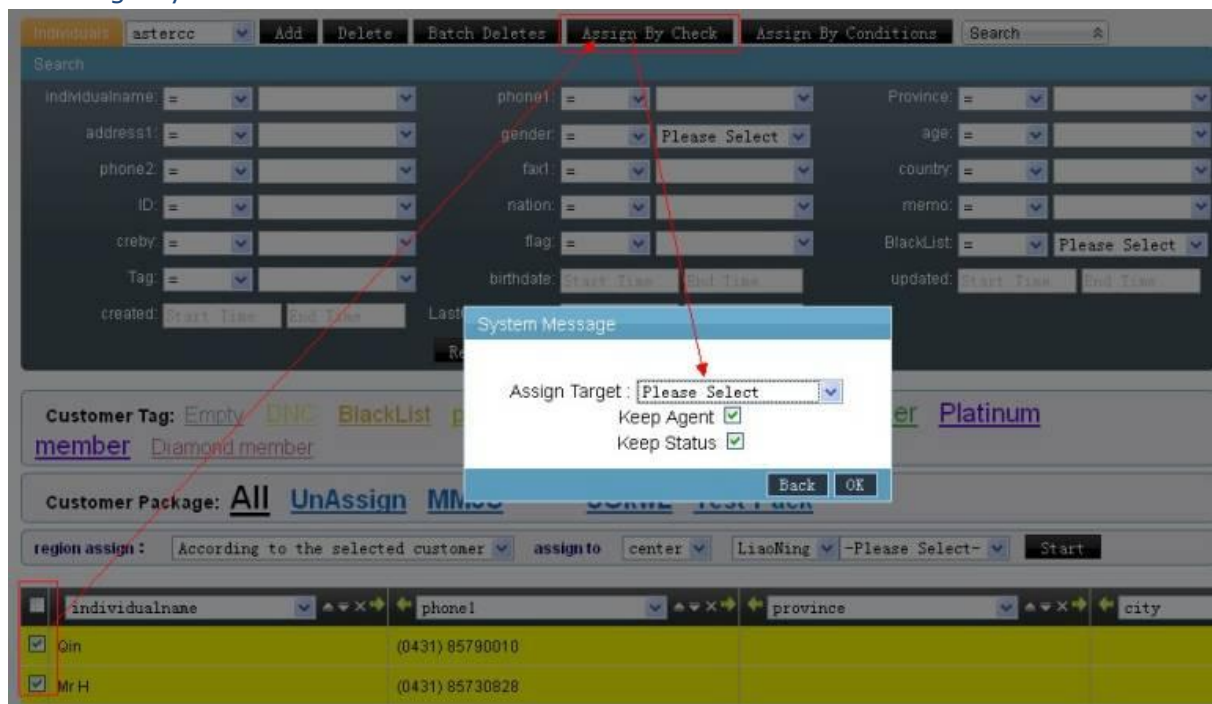
It suggests searching before batch delete. If there are huge customers, please delete them in different times. The suggested max delete customers are 3000 in a time.

Assign Customers

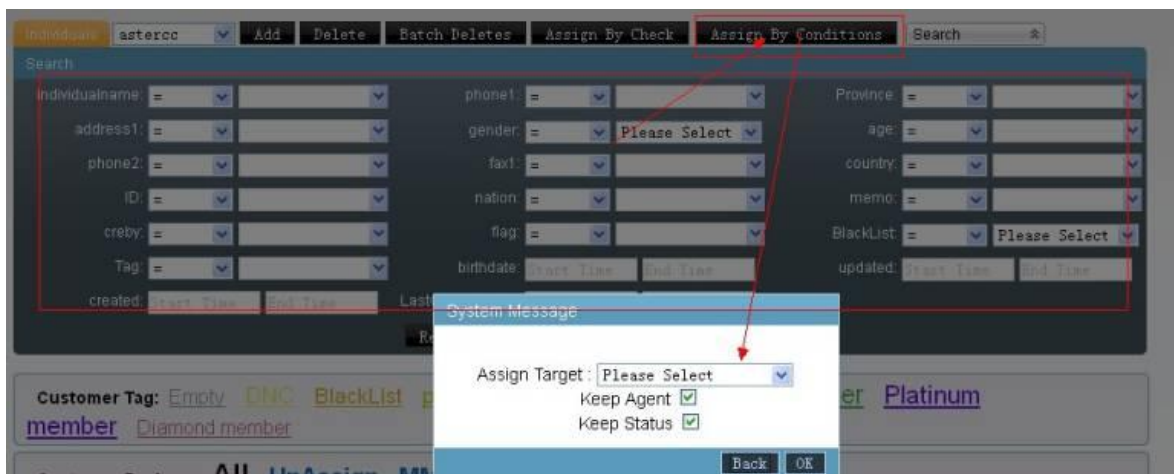
It is for assigning customers to customer package. One customer can only belong to one customer package. If assign a customer who has belonged to one customer package, it will resign to this new customer package.

There are three ways of assigning customer:

1. Assign by check



2. Assign by condition. It is similar to batch delete, the suggested max assign customers are 3000.

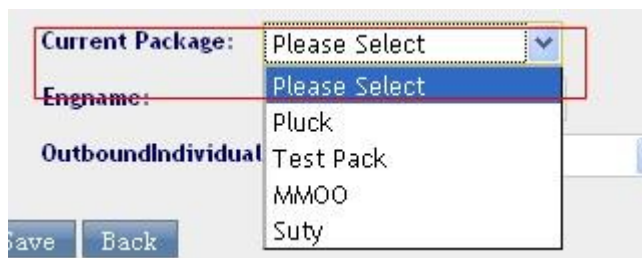


For the above two ways, please select assign target:

Keep Agent: Say if customer belongs to A customer package and is taking care by agent 1000. Now you will assign this customer to customer package B. The system will check if agent 1000 also in package. If yes, this customer will assign to agent 1000 directly.

Keep Status: If customer in package A is pending, and now you assign it to package B, the system will keep its status pending.

3. Assign customer package when adding a new customer. If this field is not editable, please follow 1 and 2 to do the assigning.



1.2 Region Assign

Only region assign system will show below fields. Select customer data to assign region, then click start.

It is a copy of last node customers to next node.



20.3 Organization

On the left menu, please go to [Customer] -> [Organization] to open the page.

Module Funtion: It is for managing organization customer list. When create a team, the system will create an individual customer list and an organization customer list. The list can be used for customer server and customer campaign.

The search fields, title, add field and edit field are all defined by [**Customer Field**]

Data Source

1. Bulk adding from [**Call Center**] → [**Import**]:

Import directly to individual customer list;

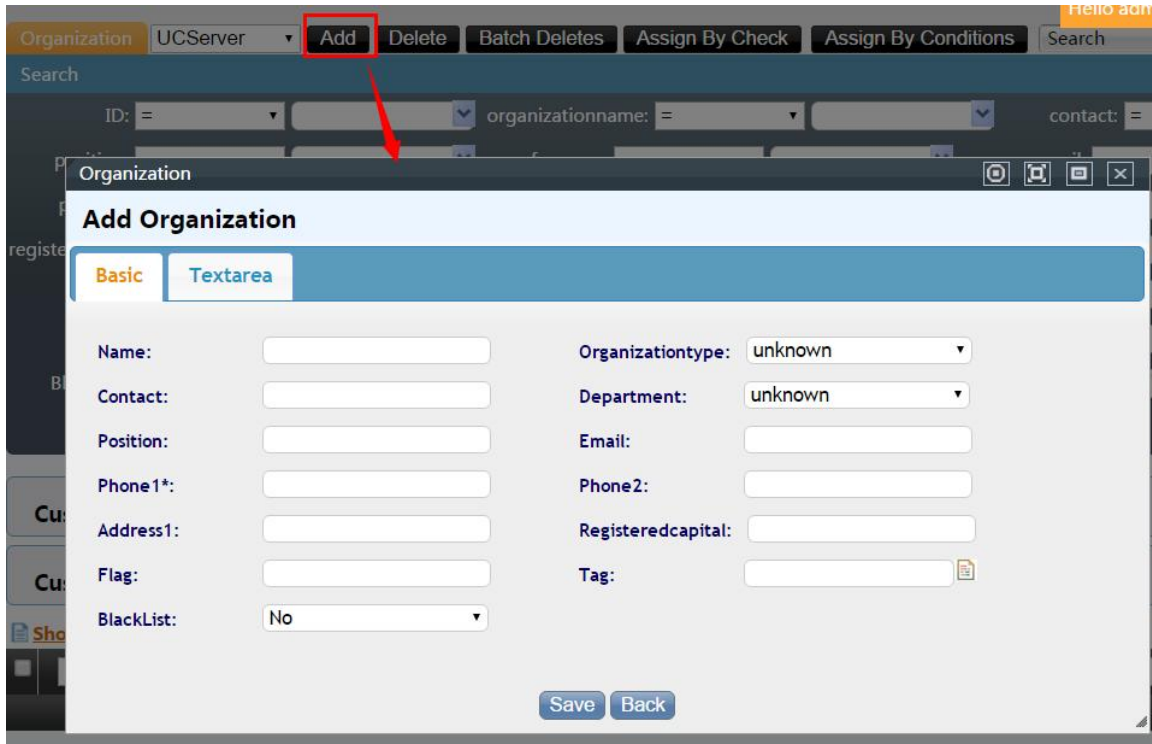
Import through individual customer package

2. Add through [**Customer**] → [**Organization**]

3. Add by agent after finishing a call;

4. Add through [**Campaigns**] → [**Customers**]

Add




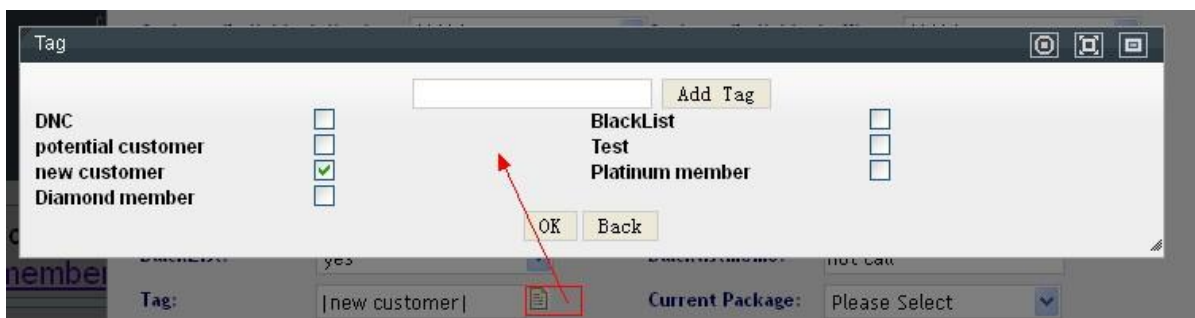
Name: Name this organization customer

Blacklist: If choose "Yes", then the numbers filled will be added to

Advanced->Blacklist. These numbers can not be call in to the system. We suggest if setting Yes for blacklist, please also fill Blacklist Reason field (Please add Blacklist Reason field under Customer->Customization)

Current Package: Which customer package this customer will belong to. One customer can only belong to one customer package.

Tag: Click  to add a tag for a customer. The available tag are setted under [Customer]->[Organization Tags].



Quick Search

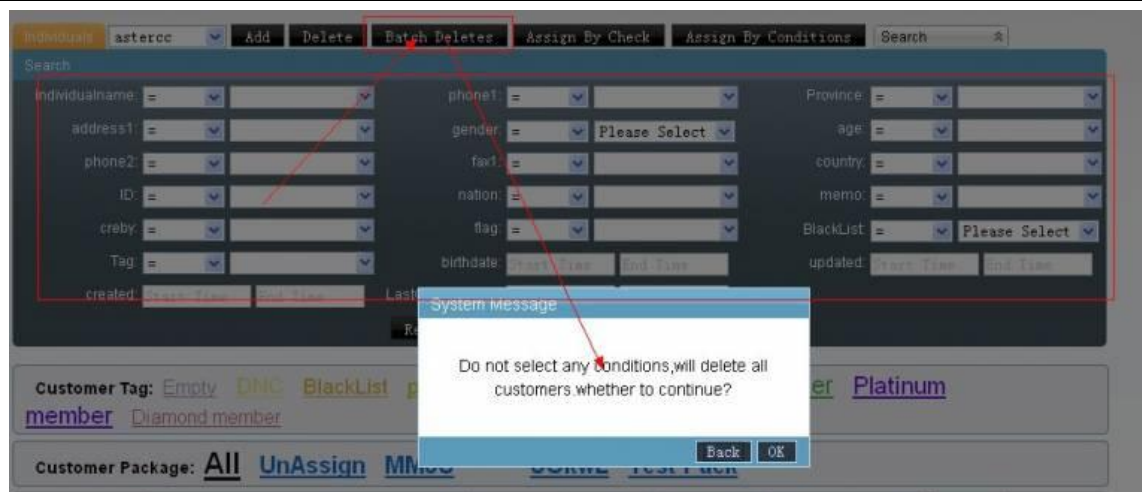
Quick search, it is like you click a quick link, then the system fill all fields automatically and press search button. It is designed for deducing steps for search.

Customer Tag: Click a customer tag to quick search customers belong to this tag.

Customer Package: To search customers belong to this package.

1.3 Batch Delete

To batch delete customers according to search result. If not select any conditions, it will delete all customers.



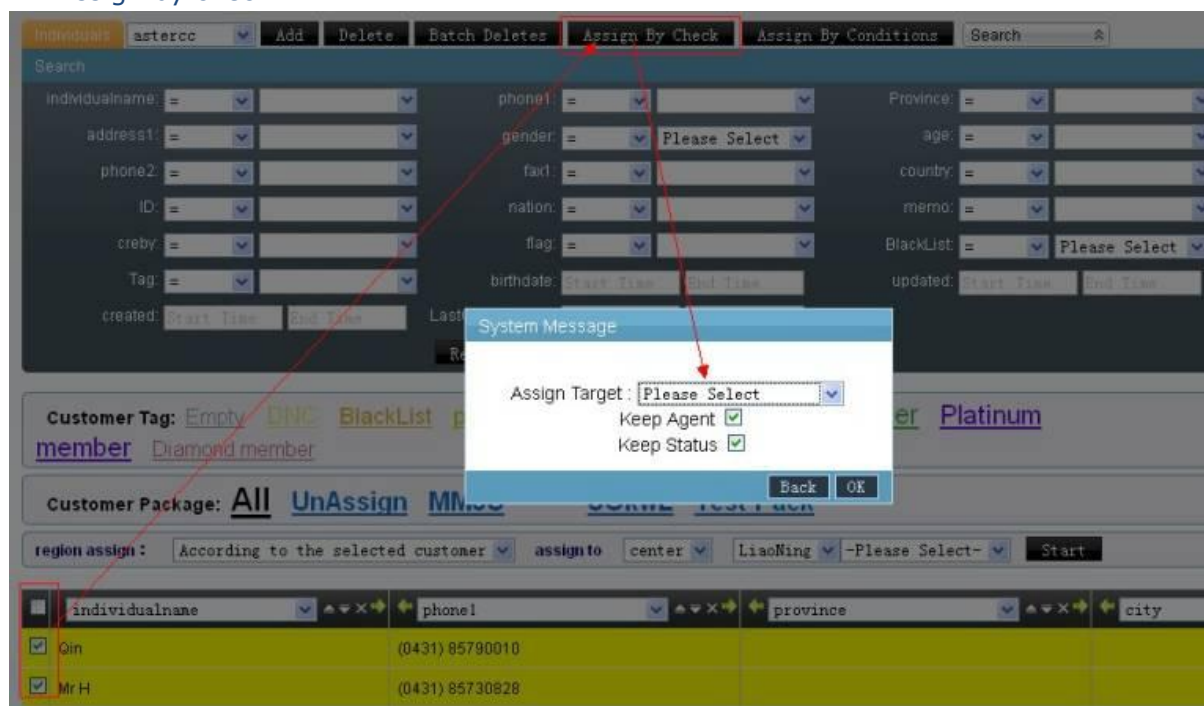
It suggests searching before batch delete. If there are huge customers, please delete them in different times. The suggested max delete customers are 3000 in a time.

Assign Customers

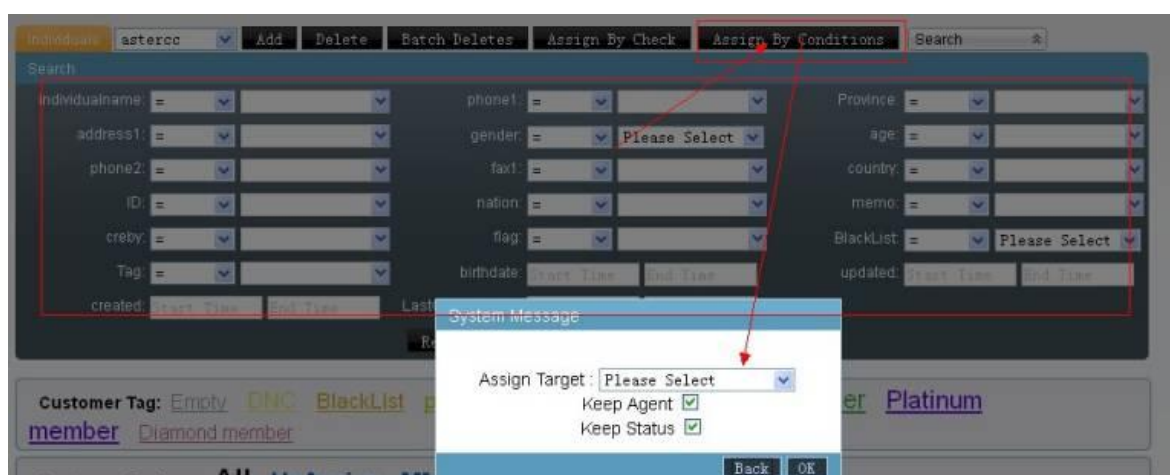
It is for assigning customers to customer package. One customer can only belong to one customer package. If assign a customer who has belonged to one customer package, it will resign to this new customer package.

There are three ways of assigning customer:

2. Assign by check



2. Assign by condition. It is similar to batch delete, the suggested max assign customers are 3000.

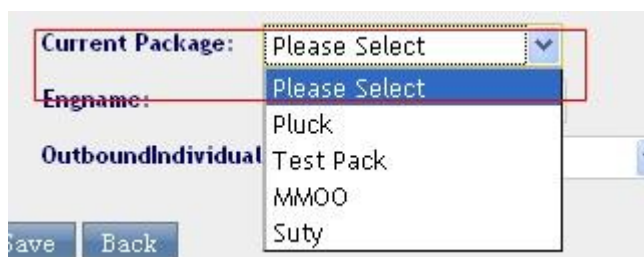


For the above two ways, please select assign target:

Keep Agent: Say if customer belongs to A customer package and is taking care by agent 1000. Now you will assign this customer to customer package B. The system will check if agent 1000 also in package. If yes, this customer will assign to agent 1000 directly.

Keep Status: If customer in package A is pending, and now you assign it to package B, the system will keep its status pending.

3. Assign customer package when adding a new customer. If this field is not editable, please follow 1 and 2 to do the assigning.



1.4 Region Assign

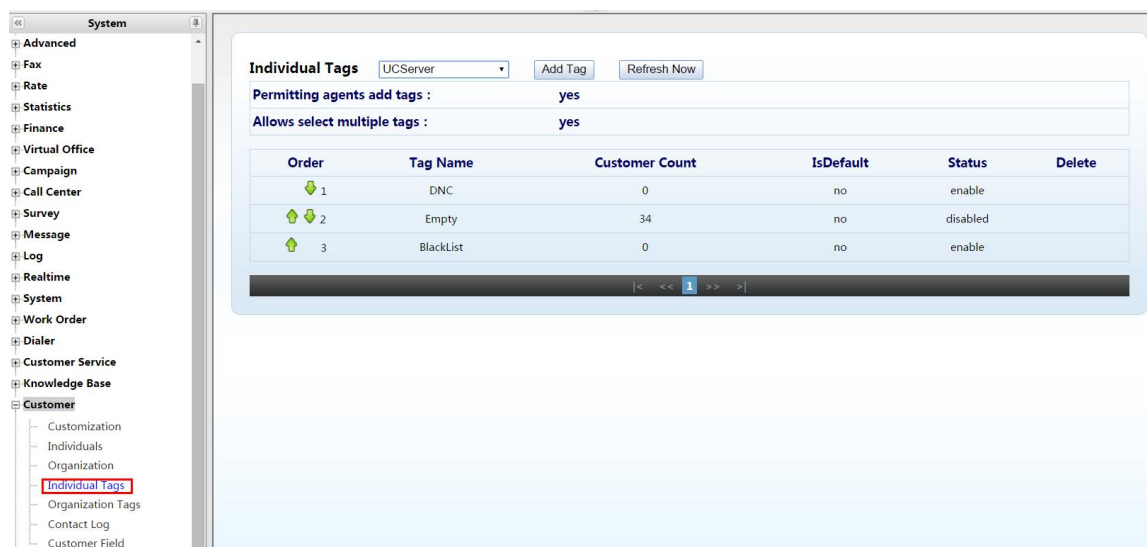
Only region assign system will show below fields. Select customer data to assign region, then click start.

It is a copy of last node customers to next node.



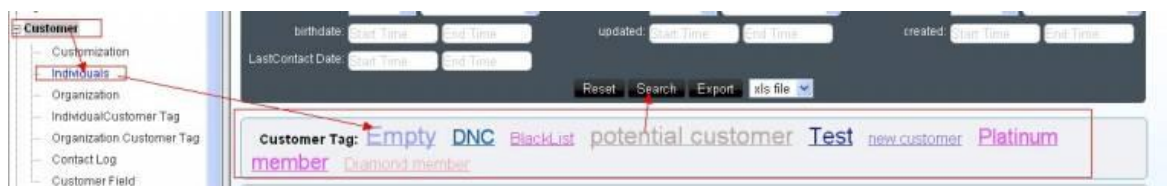
20.4 Individual Tag

On the left menu, please go to [Customer] -> [Individual Tag] to open the page.



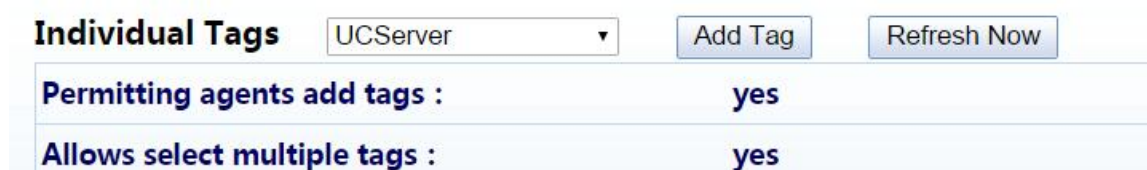
Module Function: It sets the individual customer tag fields.

Tag Name: It is similar to type, description. Your business relates to how you define the tag. Eg: Set tag as new customer, Blacklist, potential Customer. Next time, you can quick search these customers under Individual settings.



1.5 The tag adding permission

It defines a team's permission:

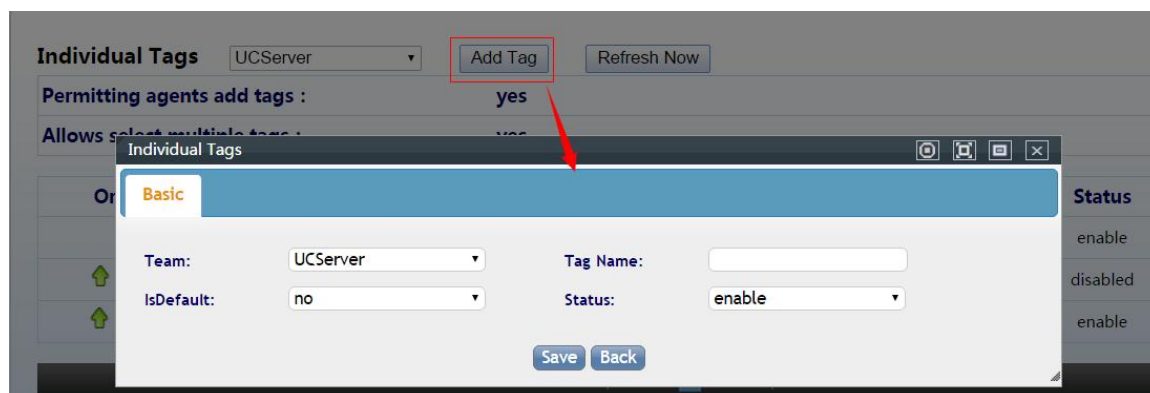


Permitting agents add tags: When agent adding or editing a customer, he needs adding a new tag for this customer, but this tag has not been created by administrator. Whether allow agent to adding a new tag or not. (If yes, then all agents in the same team can use this new tag).

Allows select multiple tags: Whether allow select multiple tags for a same customer. It depends on your business. If the tag for processing, choose No. If the tag for customer description, choose Yes.

1.6 Add Tag

Click Add Tag to add a new individual tags



Team: Which team this tag will apply to;

Tag Name: Name this tag;

Is Default: If set default, the system will add this tag to imported customers automatically. In addition, when adding a new customer, this tag is clicked by default.

If set No, then a team can only have one default tag.

Status: Only when enable will this tag applying to customer data.

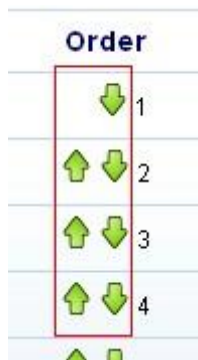
1.7 Edit Tag

Double click the black tag to edit.

Order	Tag Name	Customer Count	IsDefault	Status	Delete
1	Empty	1226	no	disabled	
2	DNC	0	no	enable	
3	BlackList	0	no	enable	
4	potential customer	0	no	enable	Delete
5	Test	0	no	enable	Delete
6	new customer	0	yes	enable	Delete
7	Platinum member	0	no	enable	Delete

Customer Count: How many individual customers have use this tag. Click **Delete** to, delete a tag. But it will not delete the tag in current customer data. Eg, customer A is with tag "vip", when you delete tag "vip" under Individual Tag, customer A still with "vip" field.

Order: To give orders to tags. The smaller the number, the more priority the tag has.



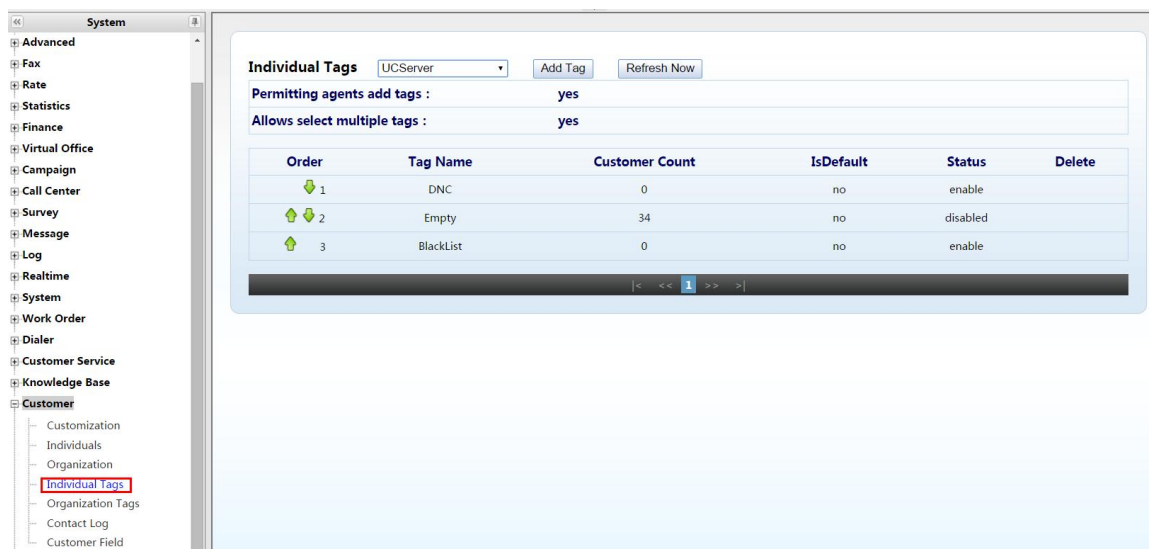
1.8 Default Tag

Empty: To search customers who without any tag. The empty tag is not available for selecting. When there is no tag for a customer, you can search it through tag= empty.

DNC: Blacklist. When a customer does not want you to call him, you can put this tag to it. The default tags can not be deleted and edited, but you can change their orders.

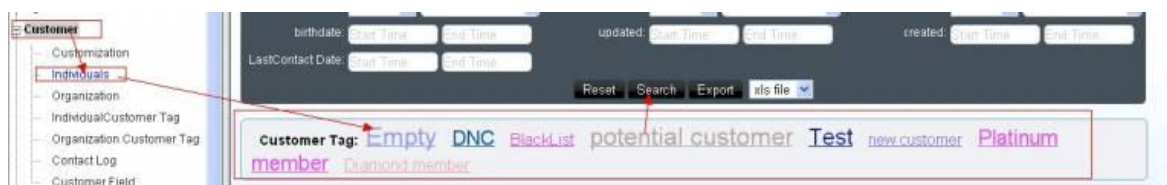
20.5 Organization Tag

On the left menu, please go to **[Customer]** -> **[Organization Tag]** to open the page.



Module Funtion: It sets the organization customer tag fields.

Tag Name: It is similar to type, description. Your business relates to how you define the tag. Eg: Set tag as new customer, Blacklist, potential Customer. Next time, you can quick search these customers under Organization settings.



1.9 The tag adding permission

It defines a team's permission:

Organization Tags UCServer Add Tag Refresh Now

Permitting agents add tags : yes

Allows select multiple tags : yes

Order	Tag Name	Customer Count	IsDefault	Status	Delete
1	Empty	0	no	disabled	
2	DNC	0	no	enable	
3	BlackList	0	no	enable	

Permitting agents add tags: When agent adding or editing a customer, he needs adding a new tag for this customer, but this tag has not been created by administrator. Whether allow agent to adding a new tag or not. (If yes, then all agents in the same team can use this new tag).

Allows select multiple tags: Whether allow select multiple tags for a same customer. It depends on your business. If the tag for processing, choose No. If the tag for customer description, choose Yes.

1.10 Add Tag

Click Add Tag to add a new individual tags

Organization Tags UCServer Add Tag Refresh Now

Permitting agents add tags : yes

Allows select multiple tags : yes

Organization Tags

Basic

Team: UCServer **Tag Name:**

IsDefault: no **Status:** enable

Save Back

Team: Which team this tag will apply to;

Tag Name: Name this tag;

Is Default: If set default, the system will add this tag to imported customers automatically. In addition, when adding a new customer, this tag is clicked by default.

If set No, then a team can only have one default tag.

Status: Only when enable will this tag applying to customer data.

1.11 Edit Tag

Double click the black tag to edit.

Order	Tag Name	Customer Count	IsDefault	Status	Delete
1	Empty	1226	no	disabled	
2	DNC	0	no	enable	
3	BlackList	0	no	enable	
4	potential customer	0	no	enable	Delete
5	Test	0	no	enable	Delete
6	new customer	0	yes	enable	Delete
7	Platinum member	0	no	enable	Delete
8	Diamond member	0	no	enable	Delete

Customer Count: How many organization customers have use this tag. Click **Delete** to delete a tag. But it will not delete the tag in current customer data. Eg, customer A is with tag "vip", when you delete tag "vip" under Individual Tag, customer A still with "vip" field.

Order: To give orders to tags. The smaller the number, the more priority the tag has.

Order
1
2
3
4

1.12 Default Tag

Empty: To search customers who without any tag. The empty tag is not available for selecting. When there is no tag for a customer, you can search it through tag= empty.

DNC: Blacklist. When a customer does not want you to call him, you can put this tag to it. The default tags can not be deleted and edited, but you can change their orders.

20.6 Contact Log

On the left menu, please go to **[Customer]** -> **[Contact Log]** to open the page.

Module Function: It is for checking a team's contact log. Means the individual customer contact log and organization customer contact log are all save in this page.

The team's contact logs are saved into two table. One is current contact logs, one is history contact logs. A new log will save in current contact log. According to System → Setting → Large Data Process → Current PbxCdr Table Data, The data which exceeds that time will be saved into history tables.

It shows the current data by default, if you want to view history data, please click "Selected View History Contact Logs".

1.13 Search Fields

Customer Name: The customer name saved in the log;

Contact Way: The contact way, phone, sms email or fax;

Contact Target: It is linked with contact way, to show the detail of phone (saved customer phone number), sms (saved customer sms phone number), email (saved customer email address), and fax ((saved customer fax number)

Call Result: The call result of customer campaign or customer server.

Agent Name: The agent name who take care of this customer;

Status: Only for customer campaign, the status agent set for this call log.

Memo: The memo left on the log memo;

Creby: The agent work numbers who created this customer log.

Created time: The time when create this log;

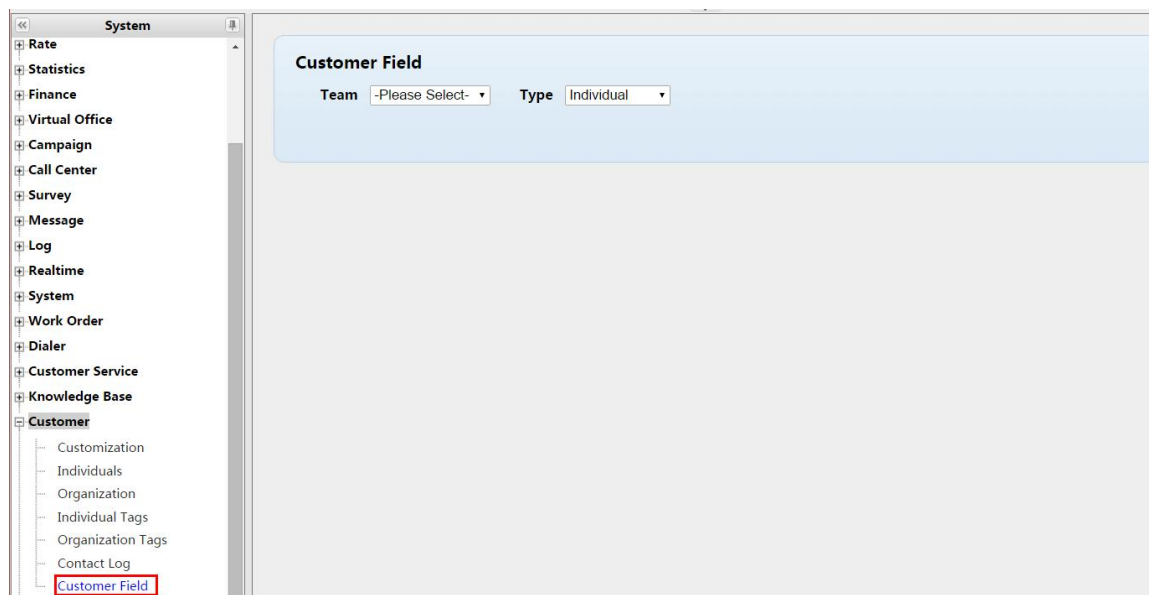
Create Region: Only available for region configuration system. Where this log created.

Customer Create Region: Only available for region configuration system. Where this log created. Where this customer belongs to.

Customer create region ID: Only available for region configuration system. Where this log created. The ID of this customer in this region.

20.7 Customer Field

On the left menu, please go to [Customer] -> [Customer Field] to open the page.



Module Funtion: It is for controlling individual customers and organization customers' managing page, which fields to show and to be edited.

Firstly, please choose a team and the type.

Customer Field

Team	UCServer	Type	Individual
			Individual
Field Display	<input type="checkbox"/> CH	<input type="checkbox"/> Organization	<input type="checkbox"/> Check All
ID	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Name	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Required
Gender	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Age	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Birthday	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Phone1	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Required
Phone2	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Fax1	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Email	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Address1	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Country	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Last Contact ID	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Memo	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
ImportID	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Creby	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Bind Customer ID	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required
Flag	<input type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input type="checkbox"/> Required

View: If checked, this field can not be viewed during adding and can only be viewed under editing page.

Edit: If checked, this field can be viewed and edited under adding and editing page.

No matter check View or Edit, this field will be show on title or on searching area.If leaving these two fields blank, it will show no where.

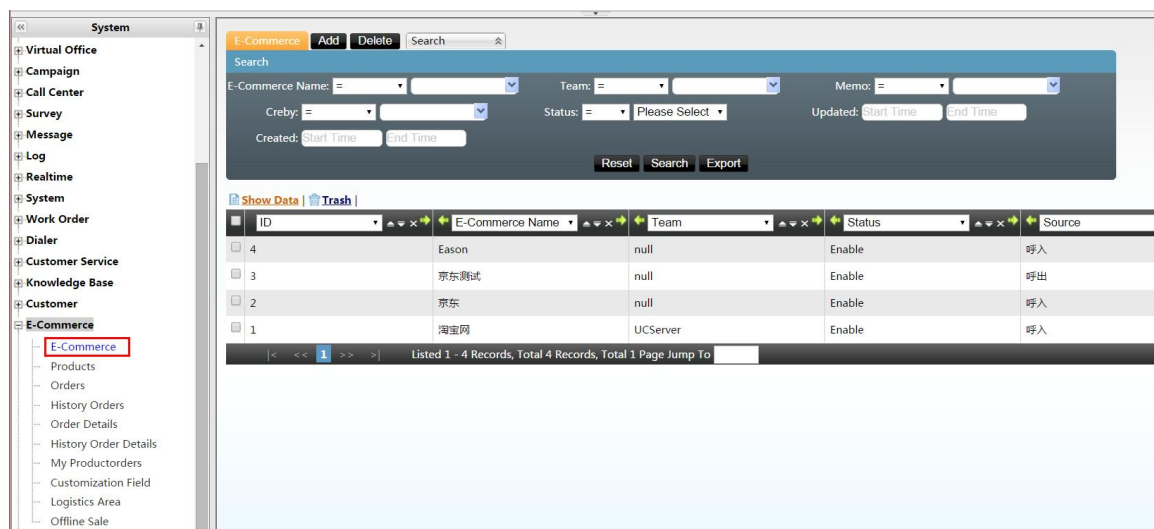
Required: Whether to set this field as required field when adding and editing customer info or not.

When you create a team, the system will check all fields as edit, only phone and name are required. You can modify on this page.

21 E-Commerce

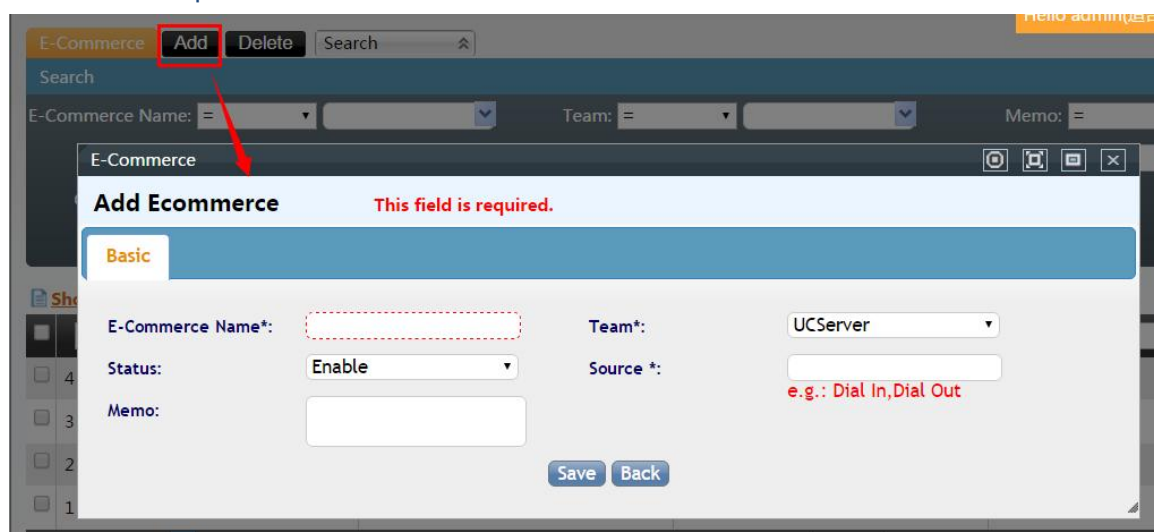
21.1 E-Commerce

On the left menu, please go to[E-Commerce]-> [E-Commerce] to open the page.



Add

Click Add to open the add Ecommerce:



E-Commerce Name: Name this E-Commerce;

Team: Which team this E-commerce belongs to;

Status: Whether to enable this E-commerce or not;

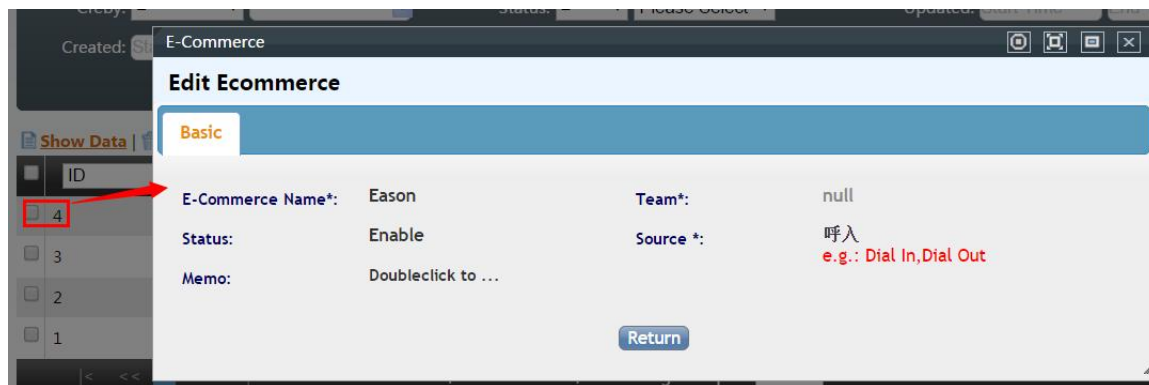
Source: How to get this E-Commerce, eg, from dial in customer or from dial out campaign;

Memo: Give a memo for E-Commerce;

Click[**Save**]when finishing the page, then it will show the newly added data on the page.

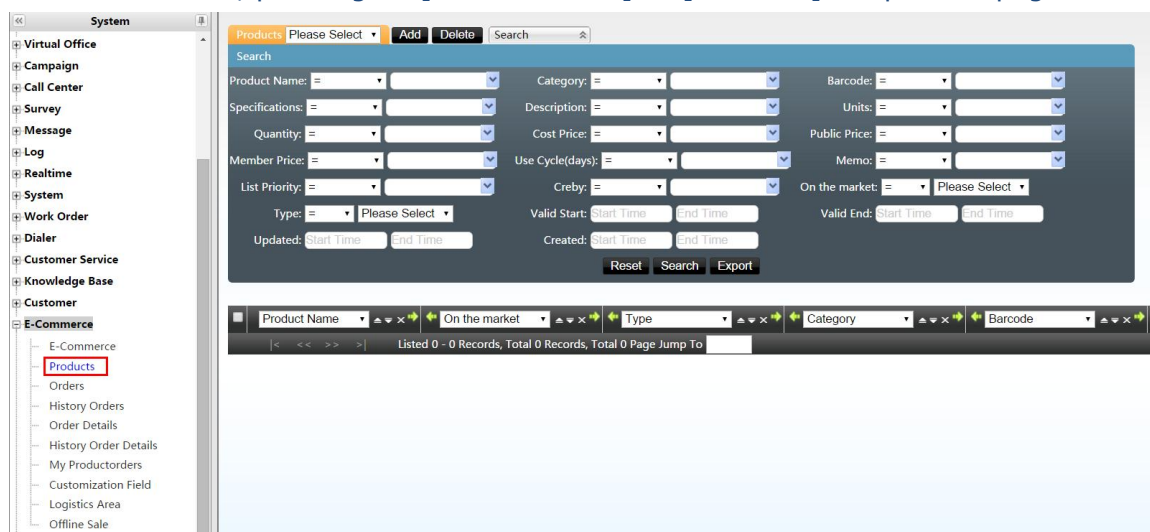
Edit

You can double click the field to re-open the edit page and edit them.



21.2 Product

On the left menu, please go to[**E-Commerce**]-> [**Product**] to open the page.



Add

Select a team then click Add to open the add Product:

The screenshot shows the 'Add Product' form in the EQUINET VINA-PBX system. At the top, there is a 'Products' dropdown menu with 'Eason' selected. Next to it are 'Add' and 'Delete' buttons. A red box highlights the 'Add' button, and a red arrow points from it to the 'Add Product' form. The form has a 'Basic' tab and contains the following fields:

Product Name:	<input type="text"/>	On the market:	Yes <input type="button" value="v"/>
Type:	Solid <input type="button" value="v"/>	Category:	<input type="text"/>
Barcode:	<input type="text"/>	Specifications:	<input type="text"/>
Units:	<input type="text"/>	Quantity:	<input type="text"/>
Cost Price:	<input type="text"/>	Public Price:	<input type="text"/>
Member Price:	<input type="text"/>	Valid Start:	0000-00-00 <input type="text"/>
Valid End:	0000-00-00 <input type="text"/>	List Priority:	<input type="text"/>
Use Cycle(days):	<input type="text"/>	Related Product:	Select Options <input type="button" value="v"/>
Description:	<input type="text"/>	Memo:	<input type="text"/>

At the bottom of the form are 'Save' and 'Back' buttons.

Product Name: Name this Product;

On the market: Whether the manufacturer has on the market or not;

Type: What kind of product it is, Solid, Virtual or Service;

Category: What is its category;

Barcode: The product's barcode.

Specification: The specification of this product;

Unit: The unit of this product, piece, carton etc.;

Quantity: How many of this product;

Cost Price: Its cost price;

Public Price: Its selling price;

Member Price: Its member price;

Valid Start: The product's valid start time;

Valid End: The product's valid end time;

List Priority: The priority of this product;

Related Product: What is its related product;

Description: Give a description to this product;

Memo: Give a memo to it;

Click **[Save]** when finishing the page, then it will show the newly added data on the page.

Edit

You can double click the field to re-open the edit page and edit them.

21.3 Orders

On the left menu, please go to **[E-Commerce]** -> **[Orders]** to open the page.

The screenshot shows the 'Orders' page in the VINA-PBX system. The left sidebar has a 'System' menu with 'E-Commerce' expanded, and 'Orders' is selected. The main area contains a search form with fields for OrderCode, Model Name, Customer Name, Original Price, Discount Amount, Amount Receivable, Express Name, ExpressCode, DeliveryMan, DeliveryPhone, DeliveryMobile, Consignee, ConsigneePhone, ConsigneeMobile, ConsigneeAddress, ConsigneeZipcode, Consignee Province, Consignee City, Consignee District, Invoice Details, Invoice Code, Memo, Account, Agent, Status, SMS Service, Order Info SMS, Logistics Status, Sales Model, Shipping Info SMS, Invoice, Participate Statistics, ShippedDate, ArrivalDate, and Updated. Below the form is a table with columns: OrderCode, Model Type, Model Name, Customer Name, and Status. The table shows 0 records.

Select an E-commerce and define on the search fields, then press Search, it will show all current orders belong to this team.

If no team selected, it will show all current orders in the system:

The screenshot shows the 'Orders' page with a team selected. The 'Orders' dropdown is set to '京东测试'. The search form is filled with values, and the 'Search' button is highlighted with a red arrow. The table below shows 3 records.

OrderCode	Model Type	Model Name	Customer Name	Status
00000000005	null	0		undelivered
00000000004	Campaign	null	未知	shipped
00000000003	Campaign	null	未知	intransit

21.4 History Orders

On the left menu, please go to **[E-Commerce]** -> **[History Orders]** to open the page.

System

- Virtual Office
- Campaign
- Call Center
- Survey
- Message
- Log
- Realtime
- System
- Work Order
- Dialer
- Customer Service
- Knowledge Base
- Customer
 - E-Commerce
 - Products
 - Orders
 - History Orders**
 - Order Details
 - History Order Details
 - My Productorders
 - Customization Field
 - Logistics Area
 - Offline Sale

History Orders Please Select Delete Search

Search

OrderCode: Model Name: Customer Name: Original Price: Discount Amount: Amount Receivable: Express Name: Express Code: DeliveryMan: DeliveryPhone: DeliveryMobile: Consignee: ConsigneePhone: ConsigneeMobile: ConsigneeAddress: ConsigneeZipcode: Consignee Province: Consignee City: Consignee District: Invoice Details: Invoice Code: Memo: Account: Agent: Source: Status: SMS Service: Order Info SMS: Logistics Status: Sales Model: Shipping Info SMS: Invoice: Participate Statistics: ShippedDate: Start Time End Time ArrivalDate: Start Time End Time Updated: Start Time End Time Created: Start Time End Time

Reset Search Export

OrderCode Model Type Model Name Customer Name Status

Listed 0 - 0 Records, Total 0 Records, Total 0 Page Jump To

Select an E-commerce and define on the search fields, then press Search, it will show all history orders belong to this team.

If no team selected, it will show all history orders in the system:

History Orders Eason Delete Search

Search

OrderCode: Model Name: Customer Name: Original Price: Discount Amount: Amount Receivable: Express Name: Express Code: DeliveryMan: DeliveryPhone: DeliveryMobile: Consignee: ConsigneePhone: ConsigneeMobile: ConsigneeAddress: ConsigneeZipcode: Consignee Province: Consignee City: Consignee District: Invoice Details: Invoice Code: Memo: Account: Agent: Source: Status: SMS Service: Order Info SMS: Logistics Status: Sales Model: Shipping Info SMS: Invoice: Participate Statistics: ShippedDate: Start Time End Time ArrivalDate: Start Time End Time Updated: Start Time End Time Created: Start Time End Time

Reset Search Export

OrderCode Model Type Model Name Customer Name Status

00000000001	Campaign	null	代义亮	undelivered
-------------	----------	------	-----	-------------

Listed 1 - 1 Records, Total 1 Records, Total 1 Page Jump To

21.50 Order Detail

On the left menu, please go to [E-Commerce] -> [Order Detail] to open the page.

Order Details 京东测试

Search

ID: OrderCode: Model ID:

CustomerName: Product Name: Amount Receivable:

Discount Amount: Agent: Status: Please Select

Next Purchase: Start Time End Time Updated: Start Time End Time Created: Start Time End Time

Reset Search Export

ID	OrderCode	Status	Model	Model ID
5	00000000005	undelivered	null	0
4	00000000004	shipped	Campaign	null
3	00000000003	intransit	Campaign	null
2	00000000002	success	null	0

Listed 1 - 4 Records, Total 4 Records, Total 1 Page Jump To

Select an E-commerce and define on the search fields, then press Search, it will show all current orders detail belong to this team.

If no team selected, it will show all orders detail in the system.

21.6 History Order Details

On the left menu, please go to **[E-Commerce]** -> **[History Order Detail]** to open the page.

History Order Details Please Select

Search

ID: OrderCode: Model ID:

CustomerName: Product Name: Amount Receivable:

Discount Amount: Agent: Status: Please Select

Next Purchase: Start Time End Time Updated: Start Time End Time Created: Start Time End Time

Reset Search Export

ID	OrderCode	Status	Model	Model ID
----	-----------	--------	-------	----------

Listed 0 - 0 Records, Total 0 Records, Total 0 Page Jump To

Select an E-commerce and define on the search fields, then press Search, it will show all history orders detail belong to this team.

If no team selected, it will show all orders detail in the system.

21.7 My Product Orders

On the left menu, please go to **[E-Commerce]** -> **[My Product Orders]** to open the page.

Select an E-commerce and define on the search fields, then press Search, it will show all orders detail belong to this team.

If no team selected, it will show all orders detail in the system.

21.8 Customization Field

On the left menu, please go to **[E-Commerce]** -> **[Customization Field]** to open the page.

Add

Click Add to open the add Customization Field:

Team: Which team this filed belongs to;

E-commerce: Which E-commerce this field blongs to;

Table: Which table this field belongs to,

Field Type: input,select,radio,relate,text,upload,link,data,deattime;

Field: The name of this field;

Default Language: The default language of it;

Field Display: The other display language

21.9 Logistics Area

On the left menu, please go to[E-Commerce]-> [Logistics Area] to open the page.

ID	Area Name	Team	Logistics Group	Storage
2	华东	null	null	测试
1	华北	null	null	测试

Add

Click Add to open the add logistics area:

Add Logistics Area

Basic

Area Name: Team:

Storage: Memo:

Logistics Group: Logistics Agent:

Province: City:

Area List

Area Name: Define the area;

Team: Which team it belongs to;

Storage: Which storage it belongs to;

Memo: Give a memo to it;

Logistics Group: Which logistics group it belongs to;

Logistics Agent: Select agents who take care this area;

Province: Select a province;

City: Select a city;

Click[**Save**]when finishing the page, then it will show the newly added data on the page.

21.10 Offline Sale

On the left menu, please go to[**E-Commerce**]-> [**Offline Sale**] to open the page.

Offline Sale

E-Commerce - 淘宝网

Product Name: Type: Barcode:

Product Name	Type	Category	Barcode	Specifications	Units	Quantity	Public Price	Member Price	Description	Operation
企业级防火墙一体机	Solid	防火墙一体机		UCS-500	台	10	3000.00	2500.00	具备路由, 防火墙、上网行为管理, IPPBX等功能, VPN流量可达30M	<input type="button" value="+"/>
运营级防火墙一体机	Solid	防火墙一体机		UCS-550	台	10	5000.00	4500.00	具备路由, 防火墙、上网行为管理, IPPBX等功能, VPN流量可达200M	<input type="button" value="+"/>

.. related products

Product Name	Type	Category	Barcode	Specifications	Units	Quantity	Public Price	Member Price	Description	Operation																				
<table border="1"> <thead> <tr> <th>Product Name</th> <th>Barcode</th> <th>Specifications</th> <th>Unit-Price</th> <th>Quantity</th> <th>Original Price</th> <th>Discount Amount</th> <th>Amount Receivable</th> <th>related products</th> <th>Cancel</th> </tr> </thead> <tbody> <tr> <td colspan="10">Total receivables 0.00</td> </tr> </tbody> </table>											Product Name	Barcode	Specifications	Unit-Price	Quantity	Original Price	Discount Amount	Amount Receivable	related products	Cancel	Total receivables 0.00									
Product Name	Barcode	Specifications	Unit-Price	Quantity	Original Price	Discount Amount	Amount Receivable	related products	Cancel																					
Total receivables 0.00																														

Source:

SMS Service: Invoice:

Consignee: ConsigneeMobile: ConsigneePhone:

ConsigneeZipcode: Consignee Province: Consignee City:

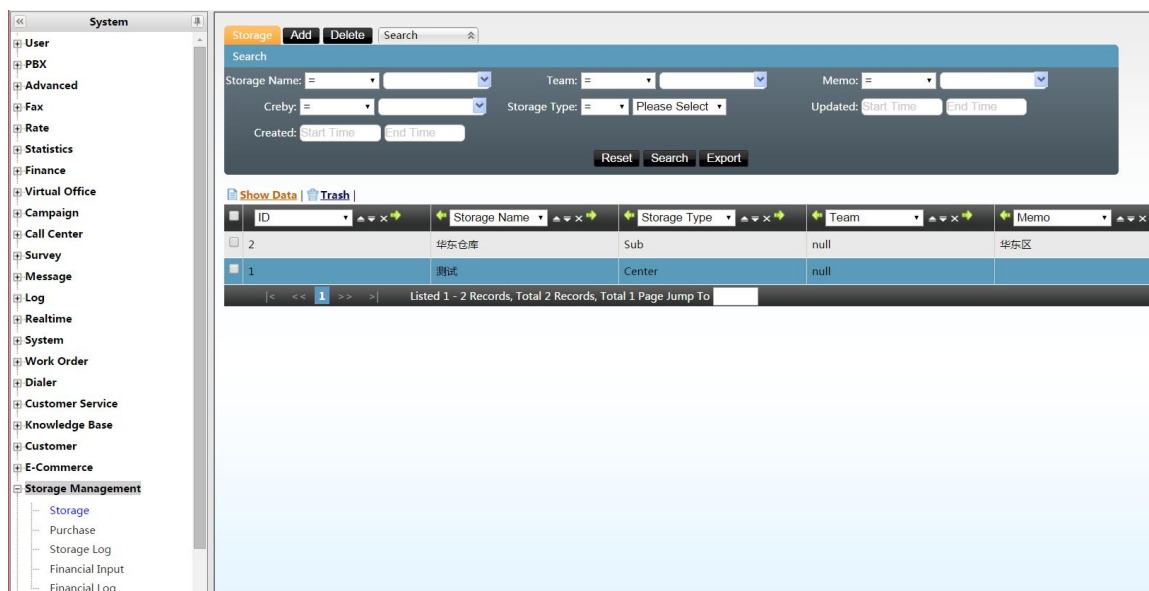
Consignee District: ConsigneeAddress:

Memo:

22 Storage Management

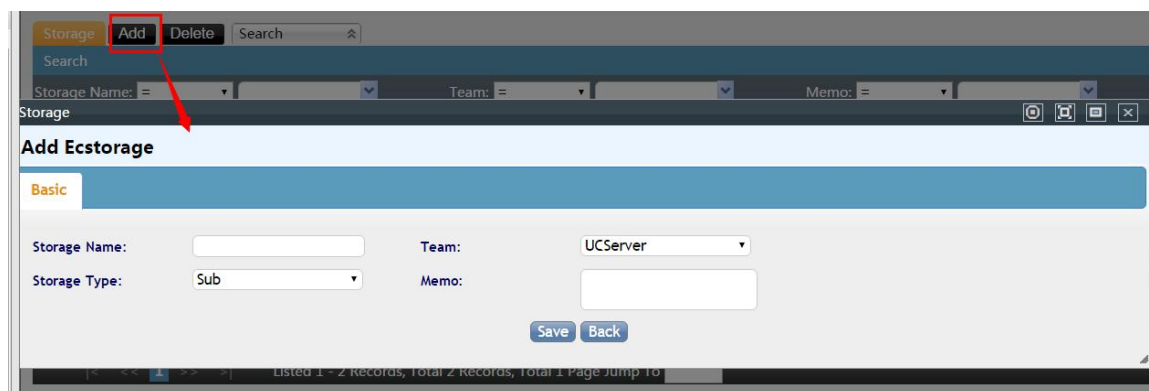
22.1 Storage

On the left menu, please go to **[Storage Management]** -> **[Storage]** to open the page.



Add

Click Add to open the add ecstorage page



Storage Name: Name this storage;

Team: Which team this storage belongs to;

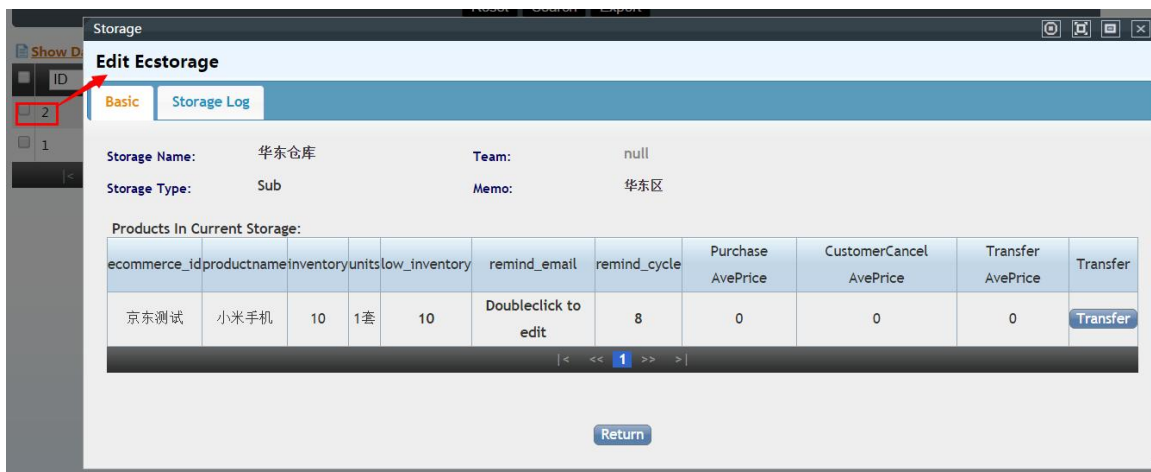
Storage Type: What kind of storage it is, center or sub; A team can only have one center storage, but can have several sub-storage.

Memo: Give a memo for this storage;

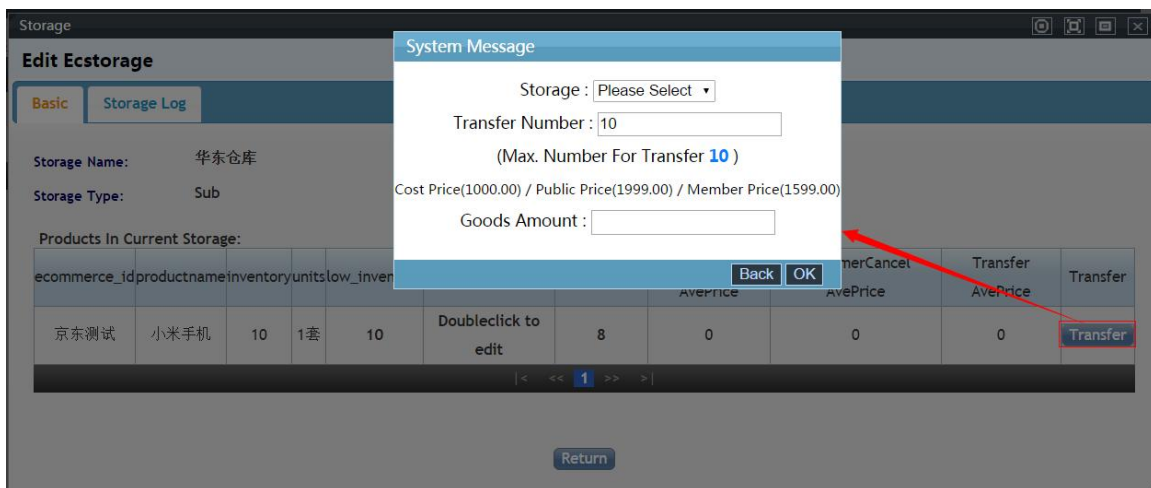
Click **[Save]** when finishing the page, then it will show the newly added data on the page.

Edit

You can double click the field to re-open the edit page and edit them.



On the Basic page, it will show the products in this storage, click Transfer, you can transfer them into another storage:

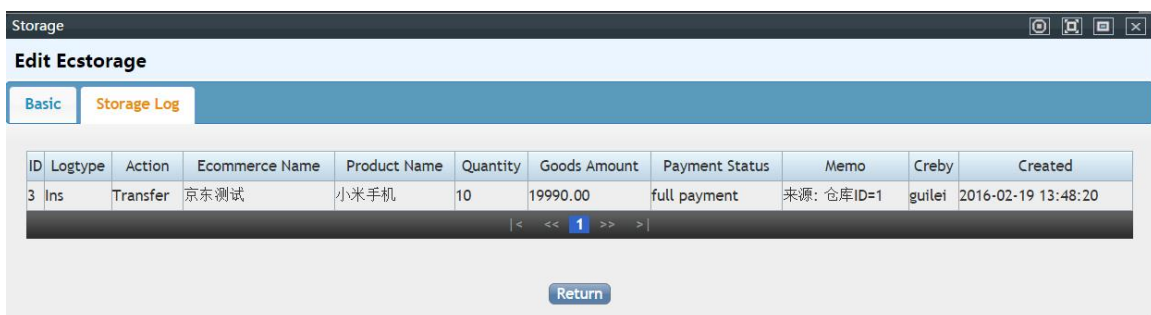


Storage: Select a storage name;

Transfer Number: How many products will be transferred;

Good Amount: How much these transferred products cost;

On the Storage Log page, it shows more info about this storage:



22.2 Purchase

On the left menu, please go to [Storage Management] -> [Purchase] to open the page.

Add

Click Add to open the add ecstorage page

Team Name: Which team this purchased product belongs to;

Ecommerce Name: Which ecommerce this purchased product belongs to;

Product Name: Select a product name;

Quantity: HowThe quantity of purchased product;

Units: What is the unit;

Amount: How much cost;

Supplier: Purchase from which supplier;

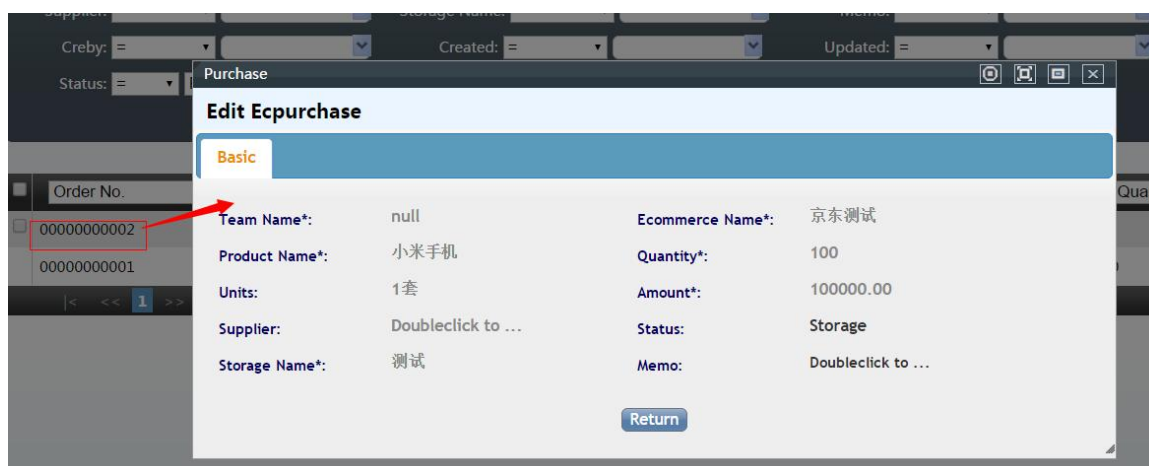
Status: Select a status for this purchase, New, Payment,Arrived,Storage,Return;

Memo: Leave a memo for this purchase;

Click[**Save**]when finishing the page, then it will show the newly added data on the page.

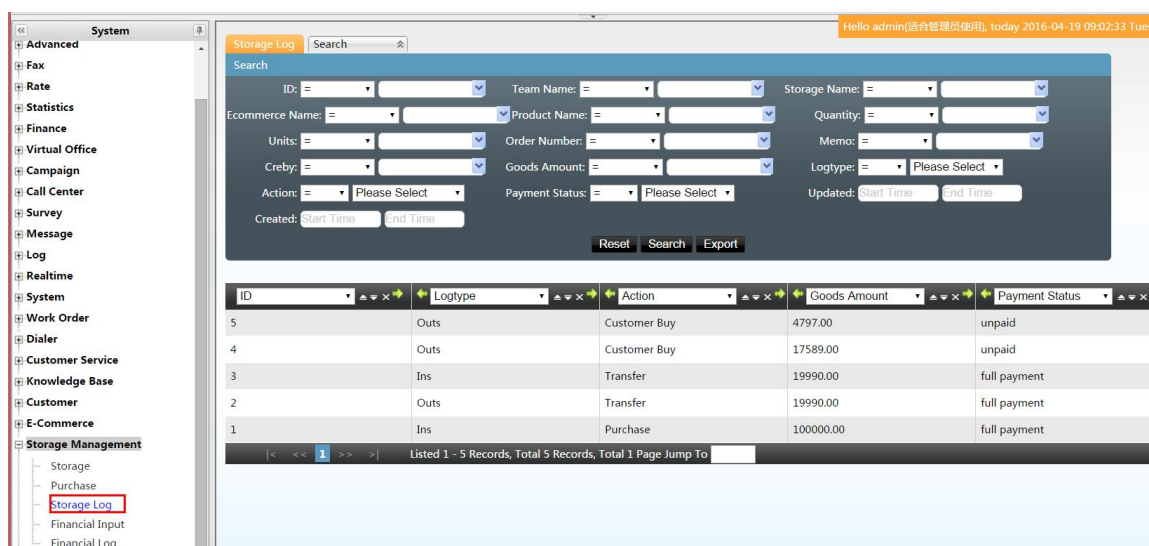
Edit

You can double click the field to re-open the edit page and edit them.



22.3 Storage Log

On the left menu, please go to **[Storage Management]** -> **[Storage Log]** to open the page.



This page shows the the storage log, please double click one data to check detailed info:

Units: =
Creby: =
Action: =
Created: Start Time

Storage Log

View EcstorageLog

Basic

Storage Name:	测试	Team Name:	null
Ecommerce Name:	京东测试	Product Name:	小米手机
Quantity:	3	Units:	1套
Goods Amount:	4797.00	Payment Status:	unpaid
Logtype:	Outs	Action:	Customer Buy
Order Number:	0000000005	Memo:	Doubleclick to ...
Creby:	9995	Updated:	2016-02-22 11:02:17
Created:	2016-02-22 11:02:17		

Return

22.4 Financial Input

On the left menu, please go to **[Storage Management]** -> **[Financial Input]** to open the page.

Financial Input

Financial Type: Pay Way: Amount: Due Date:

Cause:

Save The Bill

Bank Info

Receive BankName: Receive AccountName: Receive Account Number:

Payment BankName: Payment AccountName: Payment Account Number:

Business Objects

Team: Storage: E-Commerce: Object Type:

ID: Order Number: Payment Status: Action:

Created: **Search** **Reset**

ID	Logtype	Action	Goods Amount	Payment Status	Product Name	Quantity	Order Number	Memo	Creby	Created
< << >> >										

Please write down the detail financial info of a purchase.

22.5 Financial Log

On the left menu, please go to **[Storage Management]** -> **[Financial Log]** to open the page.

Double click one data to view its detail financial log. The gray field is not editable, only those field in black is editable.

View Financial Log			
Basic			
ID:	1	Team:	null
Financial Type:	Receive	Pay Way:	Bank
Amount:	17589.00	Due Date:	0000-00-00
Receive BankName:	农业银行	Receive AccountName:	测试
Receive Account Number:	622721412789126...	Payment BankName:	建设银行
Payment AccountName:	测试1	Payment Account Number:	622712312412412...
Storage:	测试	E-Commerce:	京东测试
Object Type:	order	Storage Log ID:	,4,
Cause:	Doubleclick to ...	Creby:	admin
Updated:	2016-02-22 10:48:25	Created:	2016-02-22 10:48:25

23 Agent Platform

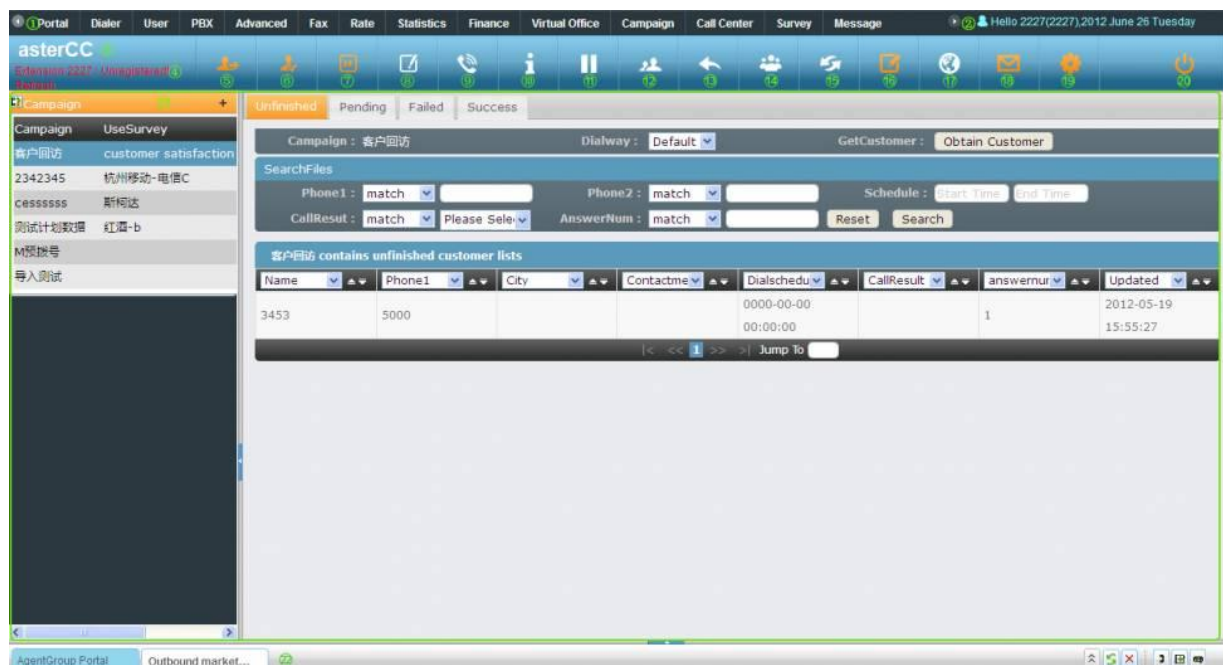
23.1 Agent Platform function keys

Login the agent platform



Please use Microsoft Internet Explorer(>=8.0) or Firefox(>3.0) or Chrome for full functionality.

Panel Function Keys



1. Function menu bar
2. Displays the current login information
3. Team name

4. VoIP extension Status Bar: When using the VoIP device registration, where the extension will display the speed of the device to the server
5. Check In button
6. Outbound dialing button: Click Dial panel will appear
7. Call Status button: Click to call panel will appear
8. Pause button
9. Consulting button:
10. Back button:
11. Tripartite Meeting on the button:
12. Transfer button
13. Task reminder button: Click the task to remind the panel will appear
14. Google Maps button: Click the map panel will appear
15. Mail / SMS button: Click the message text panel will appear
16. Settings button
17. Exit button
18. System framework
19. Display the menu bar label

23.2 Agent functions

Agent Account, Agent Number and Device

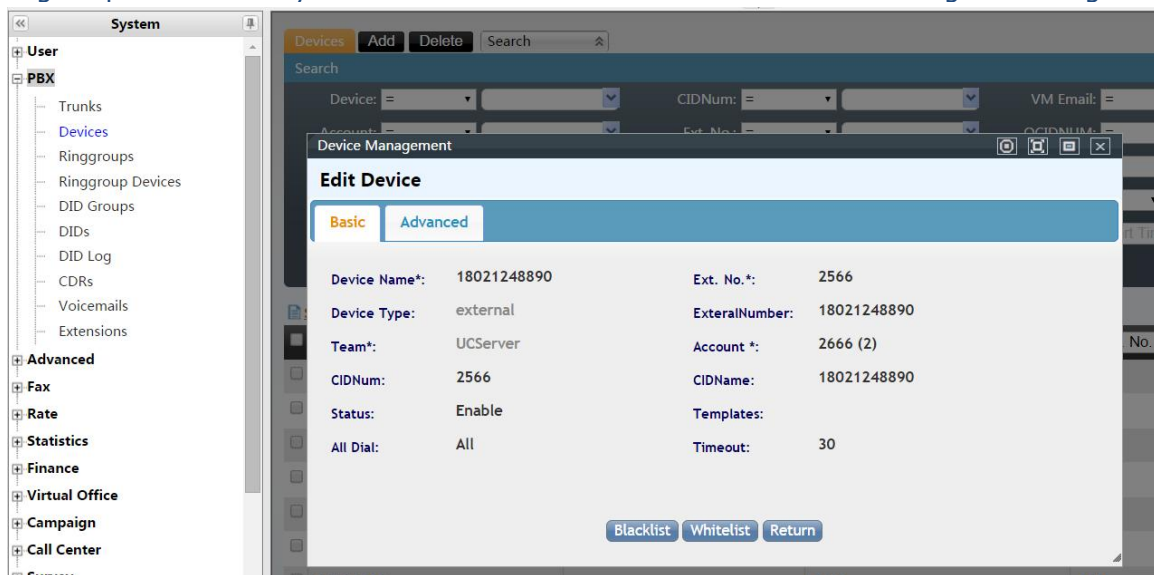
In VINA-PBX commercial, there are entries like team, user, user group, extension, agent, agent group, agent group administrator, agent extension, agent number and agent password.

- Each team can be regarded as a individual system, which needs a unique identification for the team identity (e.g., the default team identity is astercc). Teams will not be able to influence each other. Each team has their only administrator, and can assign one trunk or a trunk group as their default outbound calling trunk (group).
- User is a login unit (to login via a website, username and password are necessary) and billing unit. A user can belong to the system or a team. The system does not cap the user number.
- User group is the set of users. A user group can assign a trunk or a trunk group, which functions when the extensions under that group place calls.
- An extension must belong to a user; and one user can have more than one extension. Extension can be either an internet extension (soft phone, audio gateway, IP phone), or a phone number (cell phone, landline telephone).



Unlike most system, when register an internet extension, the form of username has to be **team identity-extension number**, e.g., astercc-5000. Please do not use the same password for registration and login.

- An agent is the basic unit of a call center. Each agent must belong to a user.
- An agent extension can be either a system extension or a number. Agent extensions can be divided into:
 - fixed extension: the extension number is unchangeable
 - self-adapting: before sign in, an agent can pick a number that has not been used by other extensions.
 - dynamic: the system will first check if a soft phone from a same IP has already registered, and if not, it will select the number that soft phone is corresponding.
- Agent group: this is the working unit of agents. Each agent must belong to at least one agent group.
- Agent group administrator: the administrator has more access. E.g., the administrator can monitor, whisper, etc. When the group is undergoing an outbound task, the administrator can also acquire the following access by default, like to import data, export statement, record, etc. Each agent group can have 0 or more administrators.
- Agent number: only used when sing in through a telephone or announce the agent number.
- Agent password: only used when invoke functions related to that agent through API.



The screenshot displays the EQUINET VINA-PBX web interface. On the left is a navigation tree under the 'System' header, with 'User' expanded to show options like Teams, Accounts, Account Groups, Agents (highlighted), Agent Groups, Privileges, Roles, Quick Setup, Quick Edit, and Account Statement. Below 'User' is the 'PBX' section with Trunks, Devices, Ringgroups, and Ringgroup Devices. The main content area is titled 'Agent Management' and contains an 'Edit Agent' form. The form has two tabs: 'Basic' (selected) and 'Advanced'. The 'Basic' tab shows the following fields: Agent No. *: 502, Password *: Doubleclick to ..., Team: andy测试, Account *: 502, Current Agent Group: andy客服坐席组, Dest Num.: 502, Device: Fixed, Status: Enable, and Role: Doubleclick to edit. At the bottom of the form, there is a credit summary: '2016-03 Month Credit: 0' followed by buttons for 'Pay', 'Adjustment Details', 'View Agent Group', 'Login as the agent', and 'Return'. The top of the interface includes a search bar and two dropdown menus labeled 'Please Select'.

System

- User**
 - Teams
 - Accounts
 - Account Groups
 - Agents**
 - Agent Groups
 - Privileges
 - Roles
 - Quick Setup
 - Quick Edit
 - Account Statement
- PBX**
 - Trunks
 - Devices
 - Ringgroups
 - Ringgroup Devices

Agent Management

Edit Agent

Basic **Advanced**

Agent No. *: 502 Password *: Doubleclick to ...

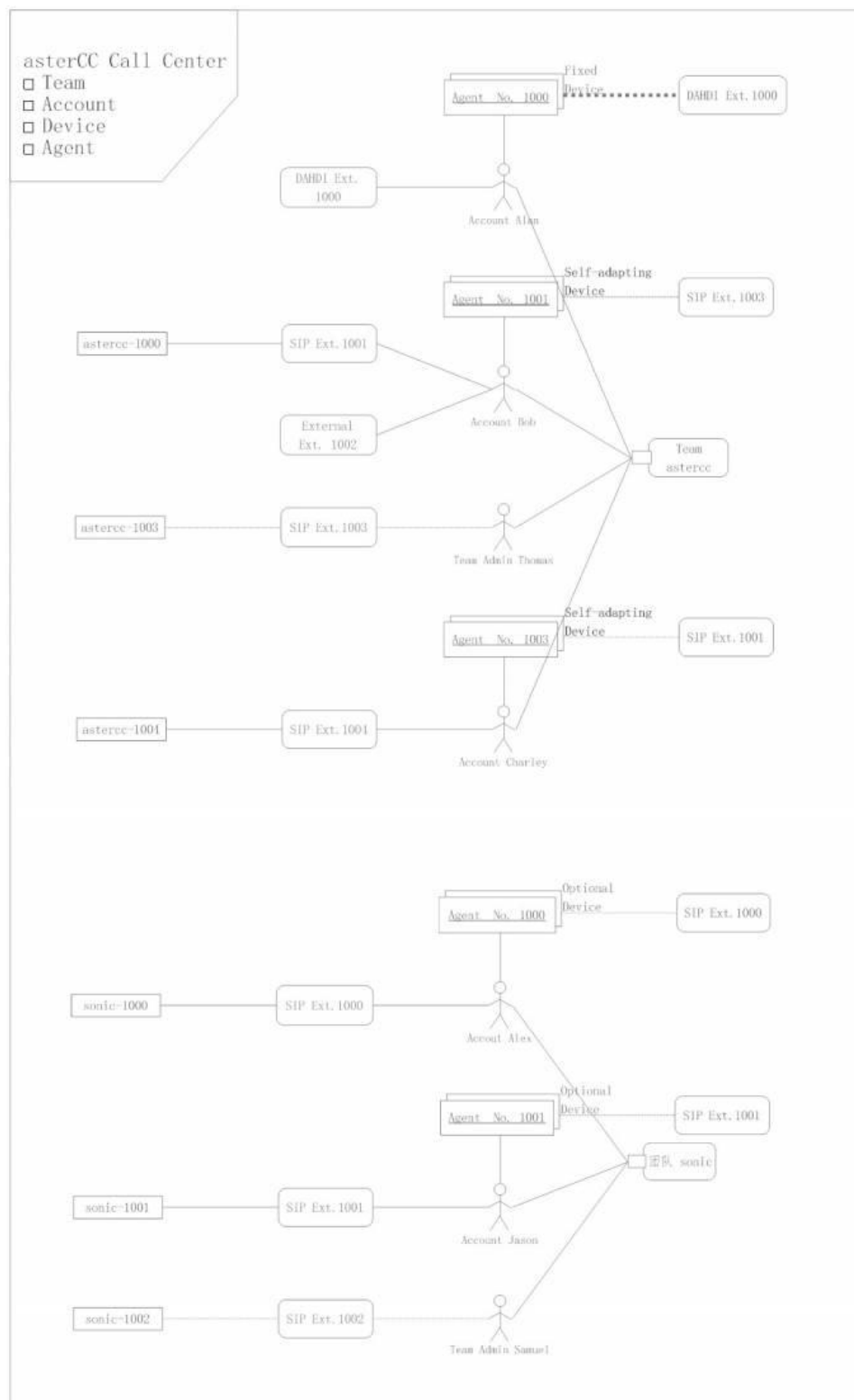
Team: andy测试 Account *: 502

Current Agent Group: andy客服坐席组 Dest Num.: 502

Device: Fixed Status: Enable

Role: Doubleclick to edit

2016-03 Month Credit: 0 [Pay](#) [Adjustment Details](#) [View Agent Group](#) [Login as the agent](#) [Return](#)



Call Popup

Call popup is a frequently-used agent function in call centers, often integrated with business systems, like CRM and telesales system. In order to achieve call popup, we are in

need of a configured business system for agents. Astercc commercial offers multiple types of business functions for customers, including:

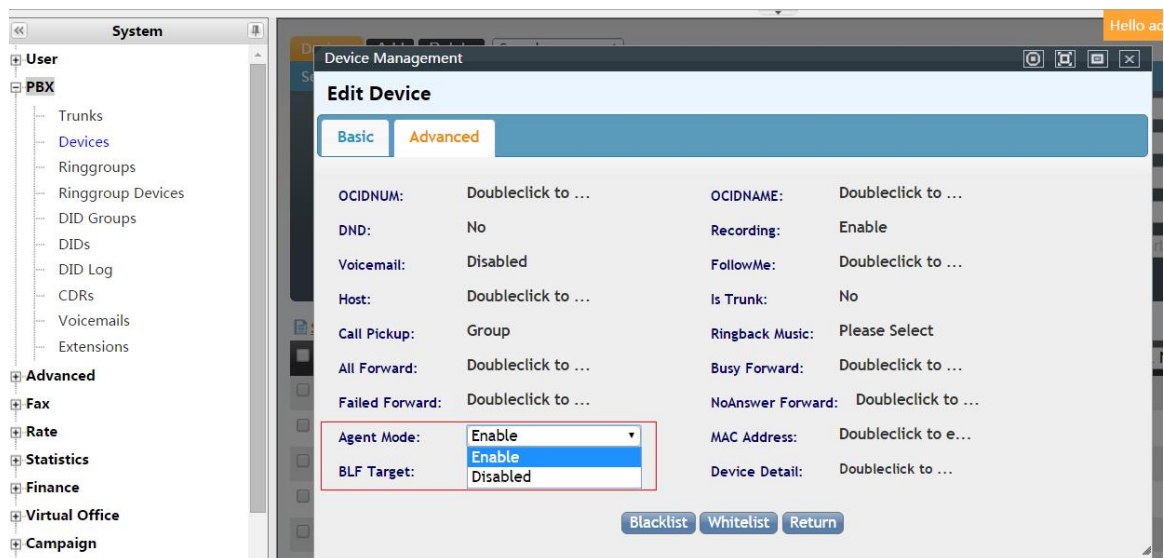
- [campaign](#)
- [customer service](#)
- [virtual office](#)

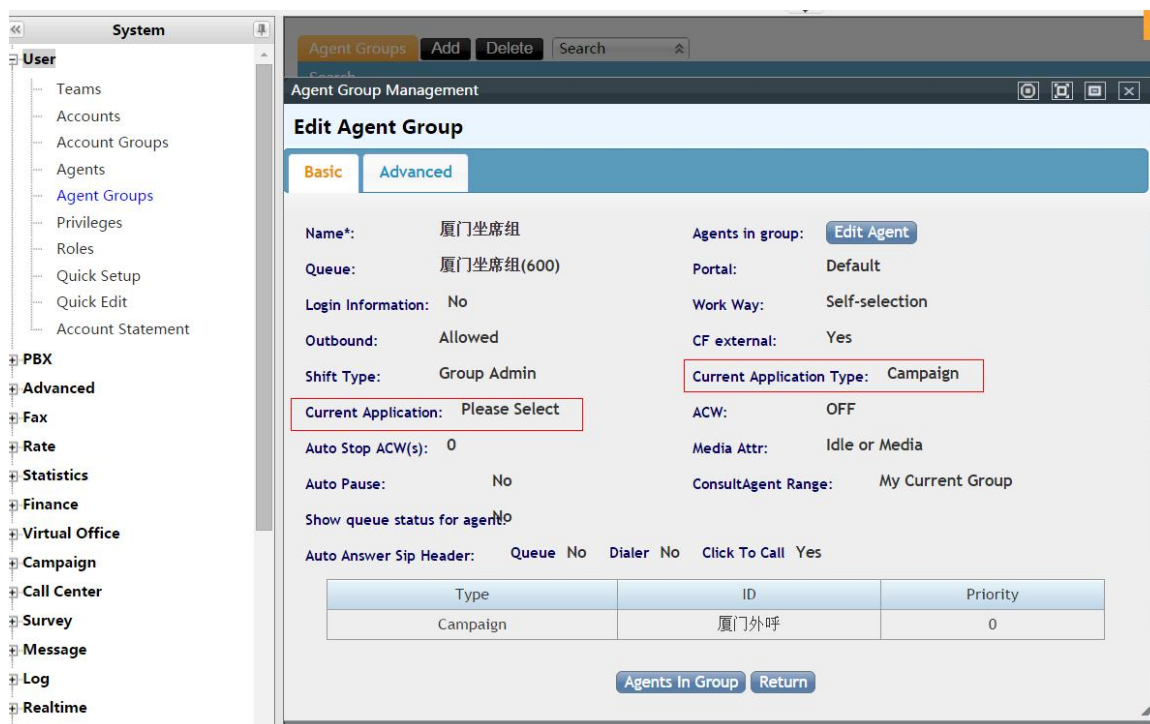
And at the same time, the system supports a third party system for integrate, and customers can easily have their own systems pops up.

1)Outbound Popup

Outbound popup means agents directly dial their corresponding number. When using it, agents have to pay attention to the following tips,

- The extension has to enable the agent mode
- the agent has to be in signed in status
- signed in through agent page
- signed in through dialing *64 from a telephone
- fixed agent does not need to sign in
- the agent group that the agent signs in has to have a business module

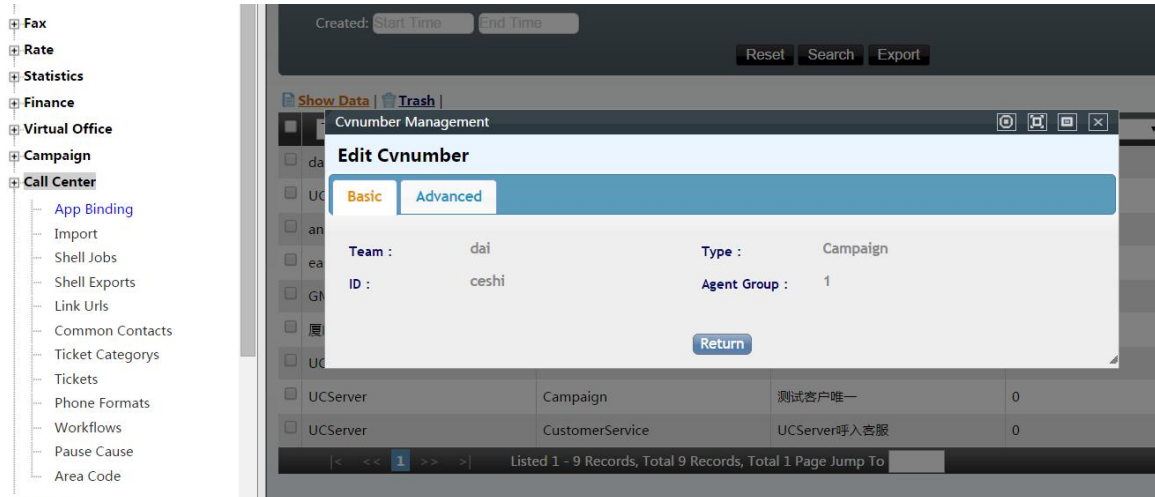




2) Direct Inbound Popup

Direct inbound popup means that the call is not from a queue, such as a DID binding call, or a call from a ring group

- There are two conditions for a direct inbound popup
- the extension has to enable the agent mode
- A corresponding popup application can be found in the binding inbound application



3) Popup from Queue Inbound Call

Popup from queue inbound call is mostly wide used in call center, like inbound calls and predial Pay attention to the following tips when using popup from queue inbound call,

- Make sure the agents are in the signed in status
- Make sure corresponding applications can be found in [**Call Center**]→[**APP Binding**] when calls come in.

Click Dial

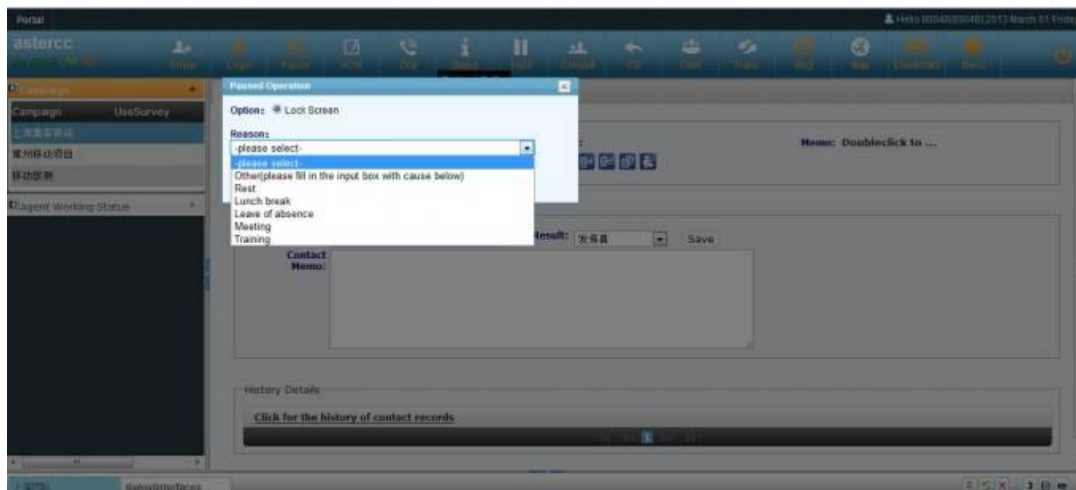
Click dial means to click the button on the page to place calls, which comes with the business system, and agents can also enter numbers to call in the call panel (the agent must have outbound permission).



The working procedure of click dial- the system calls the agent extension, after getting through, the system will then call the customer number. We suggest that agents enable the auto answer function.



Only when the group that the agent signed in has a corresponding business system can the calls be placed through the page.

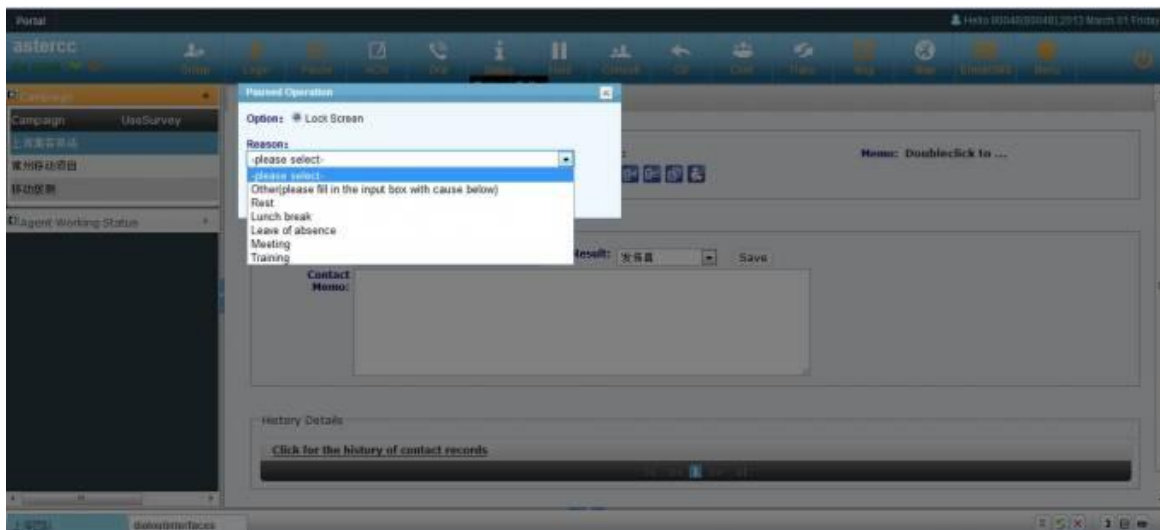


Pause

Agents can use this function when they need a pause, and the total time and reason will be shown in the agent performance statement.

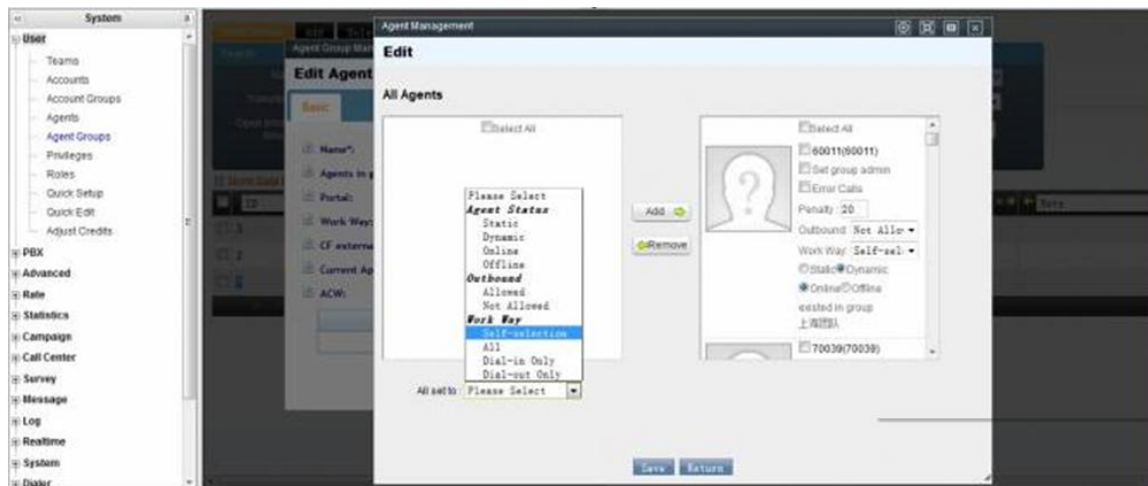


Only in the ACW and idle status can an agent pauses





- Dial-out only: agents can only practice outbound calls, and will not receive calls assigned by the group
- Dial-in only: agents can only receive calls from the queue, and cannot place outbound calls
- All: agents can do both
- Self-selection: agents can switch among the previous three ways.





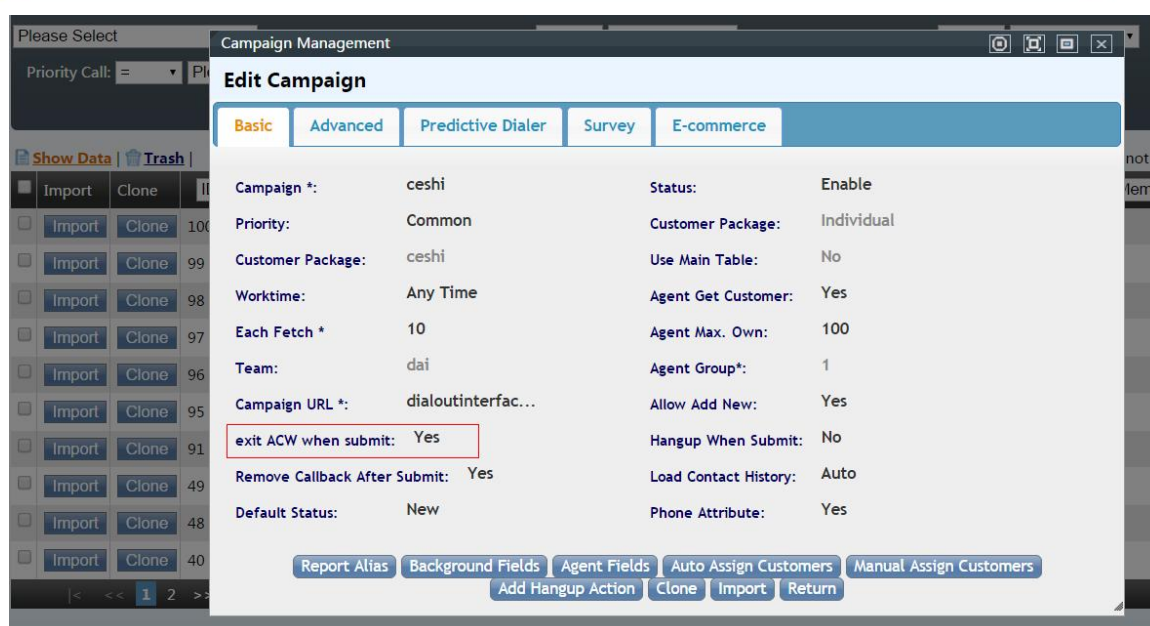
ACW

ACW means when an agent finishes a call, it will automatically enter ACW status, while the group he belongs will not give him any call. The agent can deal with data during this time before he turns into idle statue.

- Ring: regardless of whether get through, it enters ACW after ring.
- Answered: it only enters ACW when the call is answered.
- Disabled: it won't enter ACW automatically.



In Campaign, the system would exits ACW when submit



Transfer Consult and Conference

Agents can use the consult function to tranfer the call or enter a conference during a call

- Click the consult icon, select or enter the number that is being consulted
- When the consulted party answers the call, the agent will be talking to that party, and meanwhile the client will be listening to the MOH
- The agent clicks transfe and enters ACW or idle status, and the clients will be talking to the consulted party
- The agent click conference and it will become a three-party conference
- The agent can hang up any call party or all with the call panel.



asterCC supports a 30-party call conference started by an agent

Hold

During a call, the agent can use this function to pause a call, and at the same time, the customer will be listening to the MOH. Click it again to resume the call.



23.2 Supervisor Features

In a call center, the supervisor's job is responsible for the daily work of the agents in his group, guidance and supervision and to generate statistical reports.

Live Monitor

Login as group admin, then you will see agent's portal page, then go to "Group Admin", "Live Monitor"

Portal GroupAdmin Dialer User PBX Advanced Fax Rate Statistics Finance Virtual Office Campaign Call Center * Hello shixuebao(2018), 2013 June 13 Thursday

asterC Live Monitor

Duty Logout Pause ACW Dial Status Hold Consult CB Conf Trans Msg Map EmailSMS Menu

Processing...

Option Caller

Agent No.	Status	Penalty	Answered (Inbound/Outbound)	Called (Inbound/Outbound)	Talkedtime (Inbound/Outbound)	CID	Created	Lastcallin	Agent Type	Online
2018(shi)	idle	20	0/0	0/0	00:00:00/00:00:00		5 days ago 09:25:16		Static/Online	Logout
2227(shi Name)	idle	20	0/0	0/1	00:00:00/00:00:00		5 days ago 09:25:16	3day20hour59min1sec	Static/Online	Logout
2018(时)	idle	22	0/0	0/0	00:00:00/00:00:00		today 09:49:17		Dynamic/Online	Login

CIDNum CIDName Wait Time Model Type Model Name

Group2 Checkin: 2 Idle: 2 Ringing: 0 Talking: 0 Pause: 0 ACW: 0

Agent No.	Status	Penalty	Answered (Inbound/Outbound)	Called (Inbound/Outbound)	Talkedtime (Inbound/Outbound)	CID	Created	Lastcallin	Agent Type	Online
2227(shi Name)	idle	20	0/0	0/0	00:00:00/00:00:00		5 days ago 09:25:16		Static/Online	Logout
2018(时)	idle	20	0/0	0/0	00:00:00/00:00:00		today 09:49:20		Dynamic/Online	Login

CIDNum CIDName Wait Time Model Type Model Name

agent group Checkin: 1 Idle: 1 Ringing: 0 Talking: 0 Pause: 0 ACW: 0

Agent No.	Status	Penalty	Answered (Inbound/Outbound)	Called (Inbound/Outbound)	Talkedtime (Inbound/Outbound)	CID	Created	Lastcallin	Agent Type	Online
2018(时)	idle	20	0/0	0/0	00:00:00/00:00:00		today 09:49:18		Dynamic/Online	Login

CIDNum CIDName Wait Time Model Type Model Name

客户关怀 Checkin: 1 Idle: 1 Ringing: 0 Talking: 0 Pause: 0 ACW: 0

Agent No.	Status	Penalty	Answered (Inbound/Outbound)	Called (Inbound/Outbound)	Talkedtime (Inbound/Outbound)	CID	Created	Lastcallin	Agent Type	Online
2018(时)	idle	20	0/0	0/0	00:00:00/00:00:00		today 09:49:19		Dynamic/Online	Login

CIDNum CIDName Wait Time Model Type Model Name

On this page, it will give live status of each agent and agent group, you can click to open a agent, get a pop-up window, as follows

realtimeMsg

Consult

2018 (shixuebao)

Groupadmin Number : 2018

Answer: 5001
Consult 2019

Agent Group: Group1

ACW Way : ☐ ACW Ring ☐ ACW answer ☒ ACW off

Work Way : ☒ All ☐ Inbound Only ☐ Outbound Only

Login Time: 2013-06-13 09:49:17

Agent Group: Group2

ACW Way : ☒ ACW Ring ☐ ACW answer ☐ ACW off








Work Way : ☒ All ☐ Inbound Only ☐ Outbound Only

Login Time: 2013-06-13 09:49:20

in the picture above, you can see agent status, and you can do **Hangup**、**Spy**、**Call barge**、**Whisper**、**Force release**、**Force pause**、**Force idle** and **Force logoff**

Frame ① you can see the agent status, it has

1. Idle : Agent is idle, and ready to take calls, it uses color

2. Ringing : When one of the call party is ringing (inbound or outbound), it uses color 
3. Busy : When agent is in a conversation, it uses color 
4. Conference : When agent is in a conference, it uses color 
5. Pause : When agent is paused, it uses color 
6. ACW : When agent is in After Call Work, he would not receive calls, it uses color 
7. * *(agent number) is calling for consult : When there's other agent is calling this agent for consult, and it's ringing, it uses color 
8. * *(agent number) is consulted by * *(agent number) : This agent is in a consult conversation with another agent, it uses color 

Frame ② The avatar of the agent







Frame ③ The agent number and username



Frame ④ The action icon, it has **Hangup, Spy, Call Barge, Whisper, Force release, Force busy, Force idle** and **Force logoff**



If the agent is not in a call, **Hangup**、**Spy**、**Call Barge**、**Whisper**、**Force release** icon will be unusable

When agent is static in the agent group, then **Force logoff** is not available

- Hangup : Hangup all live calls of the agent
- Spy : Spy the call, means group admin could hear the conversation, but neither agent or customer would hear group admin
- Call Barge : Group admin will join the conversation
- Whisper : Talk to the agent, but customer would not hear
- Forced release : Group admin will talk to the customer instead of agent, agent will hang up.
- Forced pause : Change agent status to "Pause", agent would not receive any calls from the queue.

- Forced idle : Change agent status to "Idle", agent would start receive calls from the queue.
- Forced logoff : Log off the agent from a queue.

To use **Spy**、**Call Barge**、**Whisper**、**Force release** , by default, it will use the extension number of the group admin.

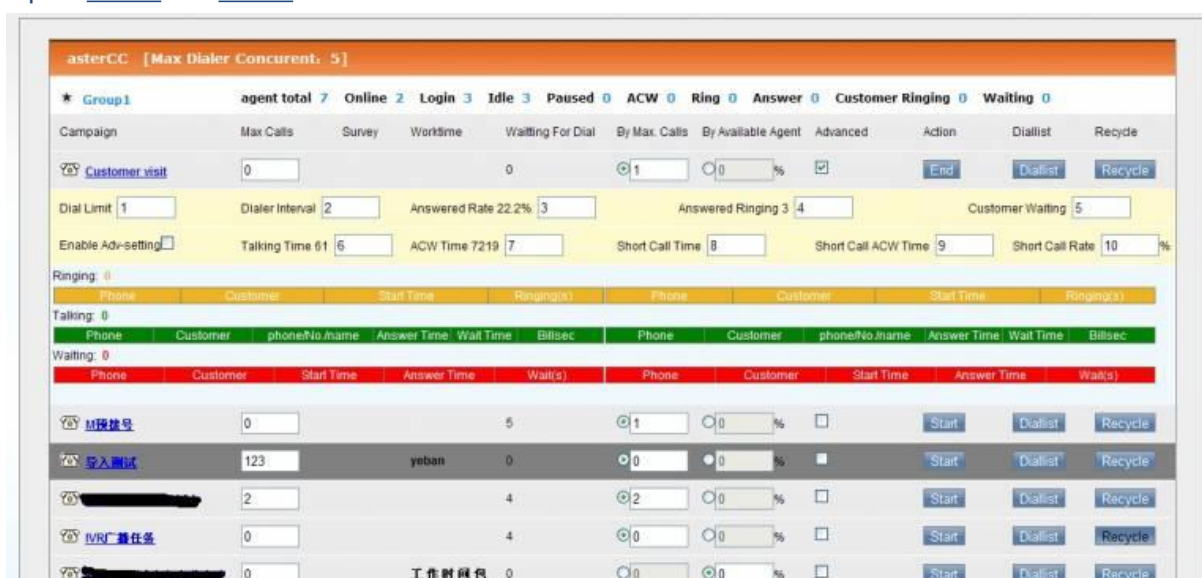
Frame ⑤ If there's a call, it will appear caller id, if it's a consult call, it will appear the number of consult party

Frame Display all agent groups of the agent logged in, group admin can change the work mode and ACW mode in the group

Predictive dialer

Group admin could control the predictive dialer of his group(s), config dialer strategy, recycle customer to dial list, start/stop the dialer

Open [dialer](#) -> [dialer](#) to check all available dialer



In this page, group admin could change the dial strategy of each campaign, check customers in the dial list or recycle dialed numbers back to the dial list

go to [dialer](#) for more information

Report Statistics

When the group admin role gets the privilege to reports page, they can see the reports of their campaigns,

Quality Control

This is used to control the call quality, make sure agents use correct words when they talk to customers

go to [campaign](#) -> [qcpages](#), there's a list for all calls waiting for quality control

Search:

QC Status: Please Select Result: Please Select QC Agent No:

Agent No: Status: Please Select Phone:

Address: Name: OutboundIndividual:

City: ImportID: OutboundIndividual:

Gender: Please Select Age: Fax:

Country: Memo: Flag:

Contactmemo: Updated: Start Time: End Time: Created: Start Time: End Time:

Reset Search Export xls file

Record	Download	CDRs	Quality Action	QC Rate	Agent No	Dialout Count	Answer Rate	QC Status	QC Result
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	QC Rate: <input type="text"/>	2227	0	0	No	Unknown
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	QC Rate: <input type="text"/>	2227	0	0	No	Unknown
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	QC Rate: <input type="text"/>	2227	25	25	Yes	Yes
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	QC Rate: <input type="text"/>	2227	0	0	No	Unknown
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	QC Rate: <input type="text"/>	2018	1	1	No	Unknown
			Qualified: <input type="radio"/> Yes <input type="radio"/> No <input type="button" value="OK"/>	QC Rate: <input type="text"/>	00	71	71	No	Unknown

Check [qcpages](#) for more information

24 System Modules

On the left menu, go to the System Modules, open the page

This page is used to upgrade the system, install modules, upgrade the module, uninstall the module

Current system version : core-2.4-rc2 [Get Upgrade Information](#)

If you want to install multiple updates upgrade, you must start from the old version.

After downloading the upgrade package, please put into the system [/var/www/html/asterCC/data/_cache/] directory or directly to upload, and ensure that the directory has read and write permissions.

System components expand, as long as the current system can meet the minimum version required.

Upgrade Package Upload: 未选择任何文件

System Upgrade

	Version Name	Rev	File Size(MB)	Install Date / Release Date	Expiration	Option
Current System Version	core-2.4-rc2	22	35.00	2016-02-01/2016-01-16	Permanent	
Current system is latest version, no need to upgrade!						

Installed Modules

Module Name	Version Name	Rev	File Size(MB)	Install Date / Release Date	Expiration	Option
Campaign	Current Version	campaign-2.4	20	1.10	2016-02-01/2016-01-16	Permanent <input type="button" value="uninst"/>
Dialer	Current Version	dialer-2.4	19	8.40	2016-02-01/2016-01-16	Permanent <input type="button" value="uninst"/>
Virtual Office	Current Version	virtualoffice-2.3	17	0.40	2016-02-01/2015-09-27	Permanent <input type="button" value="uninst"/>
Survey	Current Version	survey-2.1	14	0.10	2016-02-01/2015-09-27	Permanent <input type="button" value="uninst"/>
Customer Service	Current Version	customerservice-2.0	14	0.80	2016-02-01/2016-01-16	Permanent <input type="button" value="uninst"/>
Fax	Current Version	fax-1.8	10	0.10	2016-02-01/2015-09-27	Permanent <input type="button" value="uninst"/>
Work Order	Current Version	workorder-1.7	10	1.00	2016-02-01/2016-01-16	Permanent <input type="button" value="uninst"/>

As above, you can see the version of system, installed modules and not install modules

System Upgrade: show the current version of system. If there are the new version, there will show the upgrade version.

Installed Modules: show the installed modules in the system. (the system upgrade to the next version, the installed modules will show the upgrade information if there is the upgrade)

Can Be Install Module: show the modules which can be used to install in the system

On the above picture, you can see the current version is 2.0-beta, and next upgrade version is 2.0

System upgrade step, include

- Auto download the upgrade file in the system
- Download the upgrade file by manual (if there is no upgrade files in the system by auto)

The system upgrade file needs to be put into `/var/www/html/asterCC/data/_cache/`. When there are the files, so reopen the 'System Modules' page, you will see the 'upgrade' button shown on behind, and click it will auto upgrade.

Current system version: core-2.0-beta [Get Upgrade Information](#)

If you want to install multiple updates upgrade, you must start from the old version.
After downloading the upgrade package, please put into the system [/var/www/html/asterCC/data/_cache/] directory or directly to upload, and ensure that the directory has read and write permissions.
System components expand, as long as the current system can meet the minimum version required.

Upgrade Package Upload: [选择文件](#) [未选择文件](#) [Upload](#)

System Upgrade	Version Name	Rev	File Size(MB)	Install Date / Release Date	Expiration	Option
Current System Version	core-2.0-beta	11	45.00	2014-03-13/2013-10-22		
Upgraded To		12	49.00	2014-03-13	2014-05-11	UPGRADE

Patch package. Upgrade from core-2.0-beta to core-2.0.

Installed Modules	Module Name	Version Name	Rev	File Size(MB)	Install Date / Release Date	Expiration	Option
Customer Service	Current Version	customerservice-1.4	5	0.80	2014-03-13/2013-10-22	2014-05-11	uninst

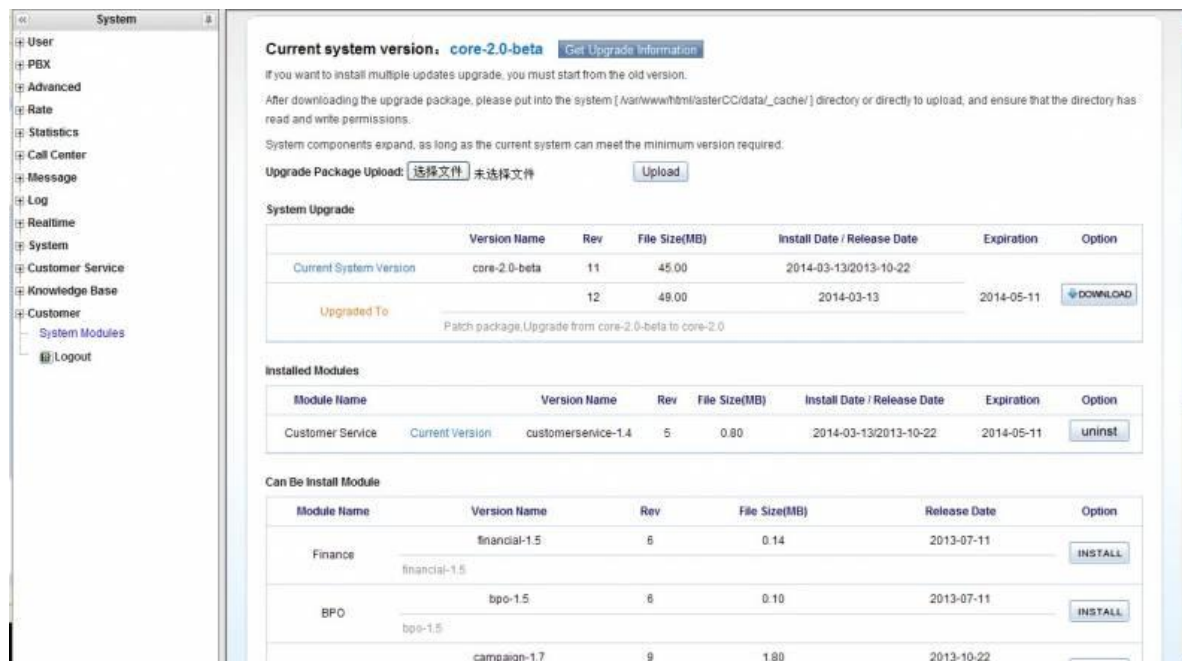
Can Be Install Module	Module Name	Version Name	Rev	File Size(MB)	Release Date	Option
Finance	financial-1.5	6	0.14	2013-07-11	INSTALL	
BPO	bpo-1.5	6	0.10	2013-07-11	INSTALL	

- System auto download the upgrade file

On System → Settings page, under the 'ADVANCED SETTINGS SYSTEM' menu, you can see the 'Auto Download UpgradePack' parameter. If it is yes, then the system will auto download the upgrade package early in the morning. If you set this parameter to no, you need to download the upgrade file manually

- Manually download

If you see the upgrade information, you can click the 'download' button to download the upgrade package. Then you will see the picture, like this:



Current system version: core-2.0-beta [Get Upgrade Information](#)

If you want to install multiple updates upgrade, you must start from the old version.

After downloading the upgrade package, please put into the system [/var/www/html/asterCC/data/_cache/] directory or directly to upload, and ensure that the directory has read and write permissions.

System components expand, as long as the current system can meet the minimum version required.

Upgrade Package Upload: [选择文件](#) 未选择文件 [Upload](#)

System Upgrade

	Version Name	Rev	File Size(MB)	Install Date / Release Date	Expiration	Option
Current System Version	core-2.0-beta	11	45.00	2014-03-13/2013-10-22		
Upgraded To		12	48.00	2014-03-13	2014-05-11	DOWNLOAD
Patch package, Upgrade from core-2.0-beta to core-2.0						

Installed Modules

Module Name	Version Name	Rev	File Size(MB)	Install Date / Release Date	Expiration	Option
Customer Service	Current Version	customerservice-1.4	5	0.80	2014-03-13/2013-10-22	2014-05-11 uninst

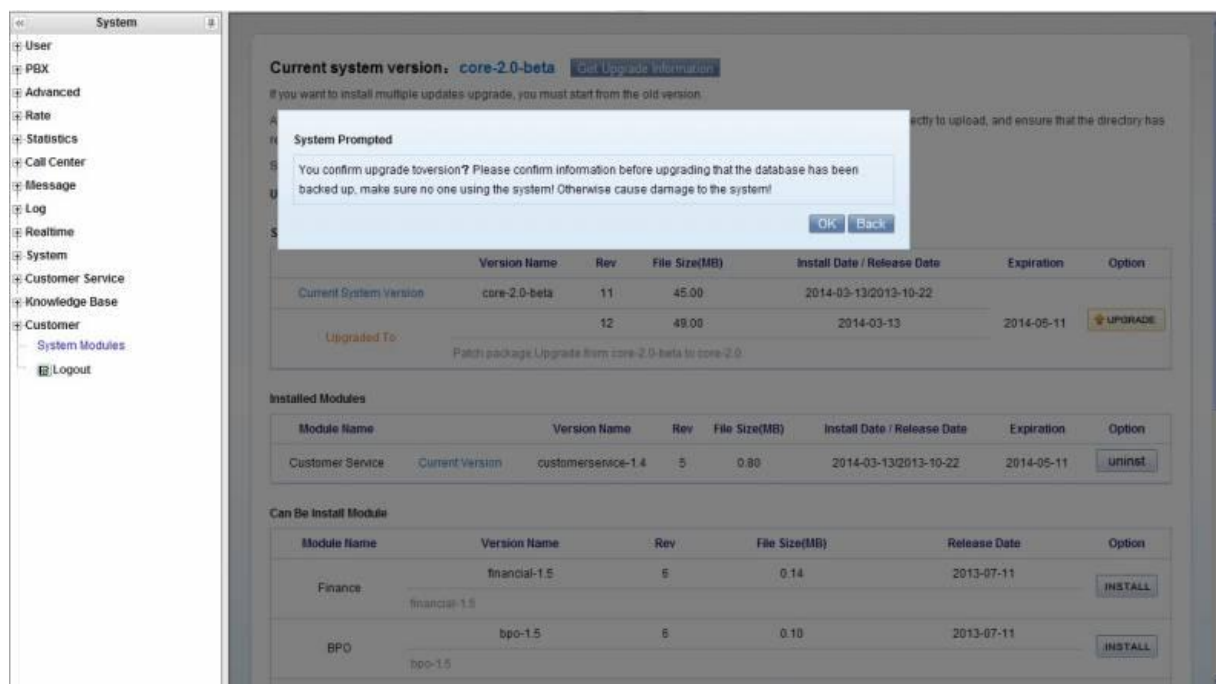
Can Be Install Module

Module Name	Version Name	Rev	File Size(MB)	Release Date	Option
Finance	financial-1.5	6	0.14	2013-07-11	INSTALL
BPO	bpo-1.5	6	0.10	2013-07-11	INSTALL
	campaign-1.7	9	1.80	2013-10-22	

Choose one to download, After finishing it, you can upload the upgrade package to /var/www/html/asterCC/data/_cache/, there are two pattern to upload

- Upload by FTP tools
- Upload by click the upload button on the page

When click the upgrade button, it will show:



Current system version: core-2.0-beta [Get Upgrade Information](#)

If you want to install multiple updates upgrade, you must start from the old version.

After downloading the upgrade package, please put into the system [/var/www/html/asterCC/data/_cache/] directory or directly to upload, and ensure that the directory has read and write permissions.

System components expand, as long as the current system can meet the minimum version required.

Upgrade Package Upload: [选择文件](#) 未选择文件 [Upload](#)

System Upgrade

	Version Name	Rev	File Size(MB)	Install Date / Release Date	Expiration	Option
Current System Version	core-2.0-beta	11	45.00	2014-03-13/2013-10-22		
Upgraded To		12	48.00	2014-03-13	2014-05-11	UPGRADE
Patch package, Upgrade from core-2.0-beta to core-2.0						

Installed Modules

Module Name	Version Name	Rev	File Size(MB)	Install Date / Release Date	Expiration	Option
Customer Service	Current Version	customerservice-1.4	5	0.80	2014-03-13/2013-10-22	2014-05-11 uninst

Can Be Install Module

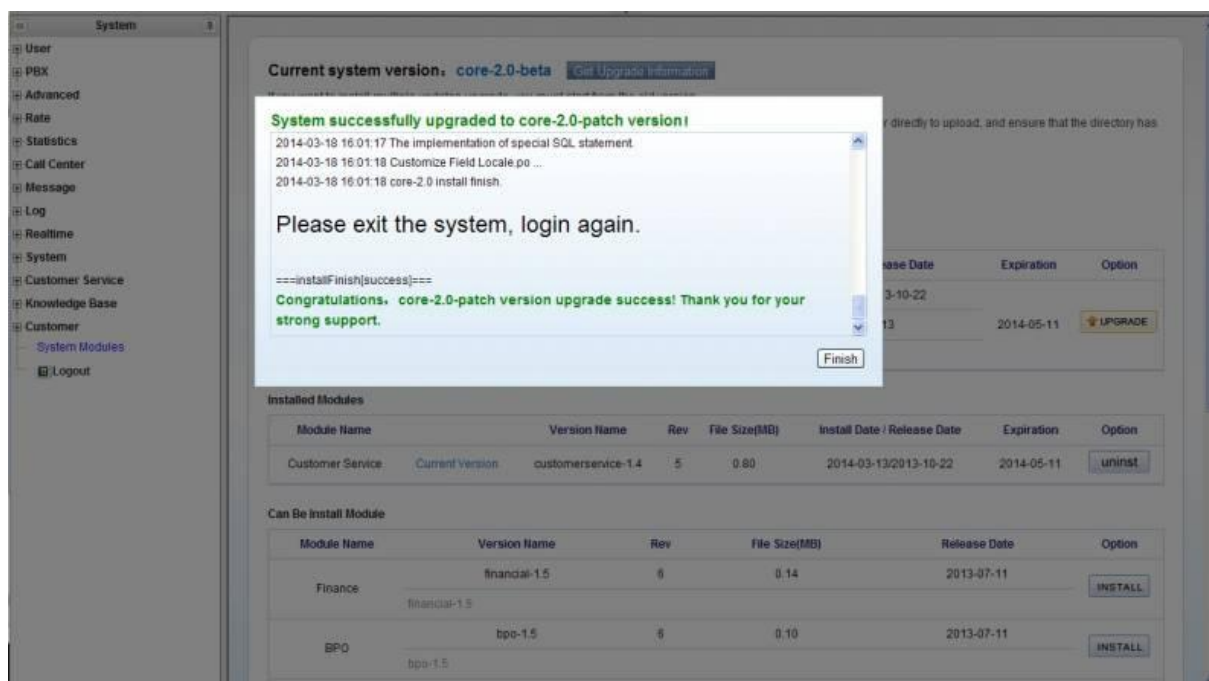
Module Name	Version Name	Rev	File Size(MB)	Release Date	Option
Finance	financial-1.5	6	0.14	2013-07-11	INSTALL
BPO	bpo-1.5	6	0.10	2013-07-11	INSTALL
	campaign-1.7	9	1.80	2013-10-22	

System Prompted

You confirm upgrade to version? Please confirm information before upgrading that the database has been backed up, make sure no one using the system! Otherwise cause damage to the system!

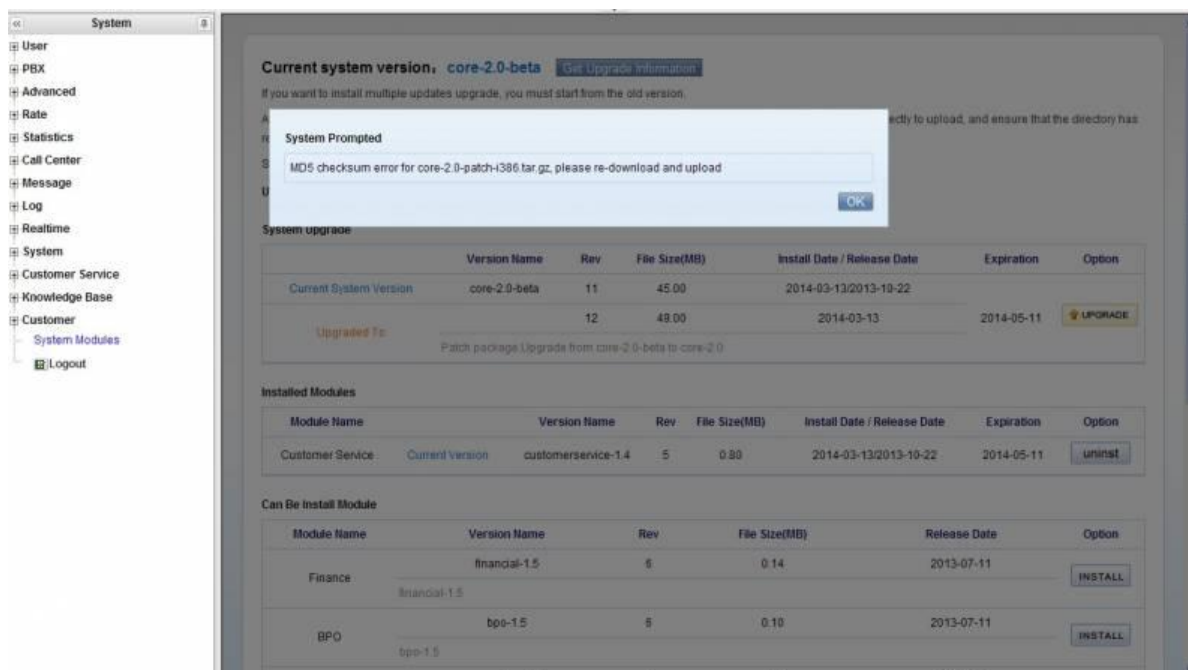
[OK](#) [Back](#)

If you want to continue, click ok, then it will upgrade

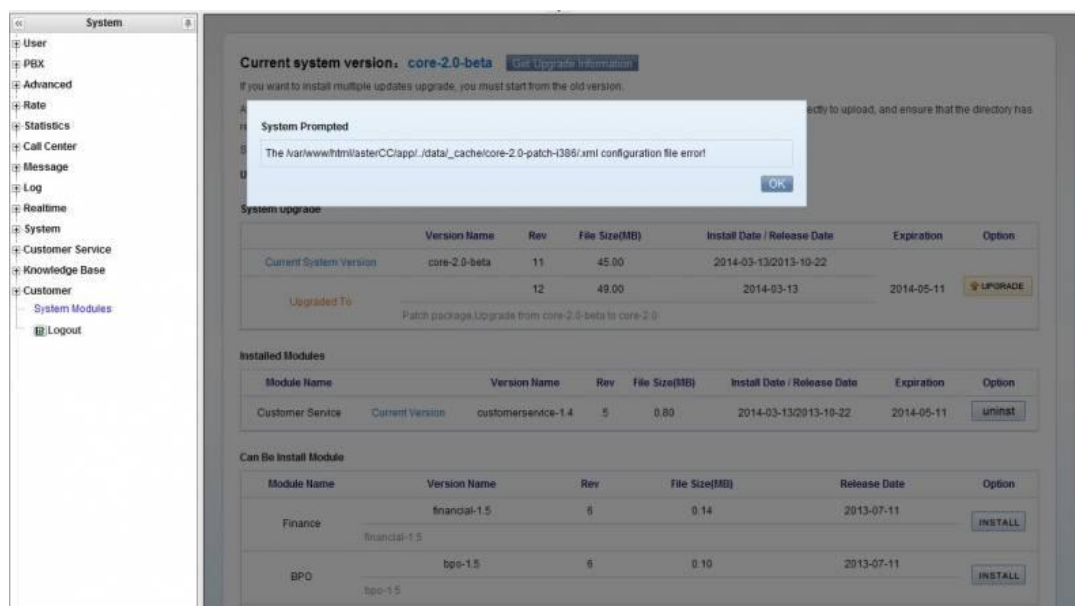


In the upgrade process, there will disappear several problems:

- Upgrade package MD5 check error, like this:

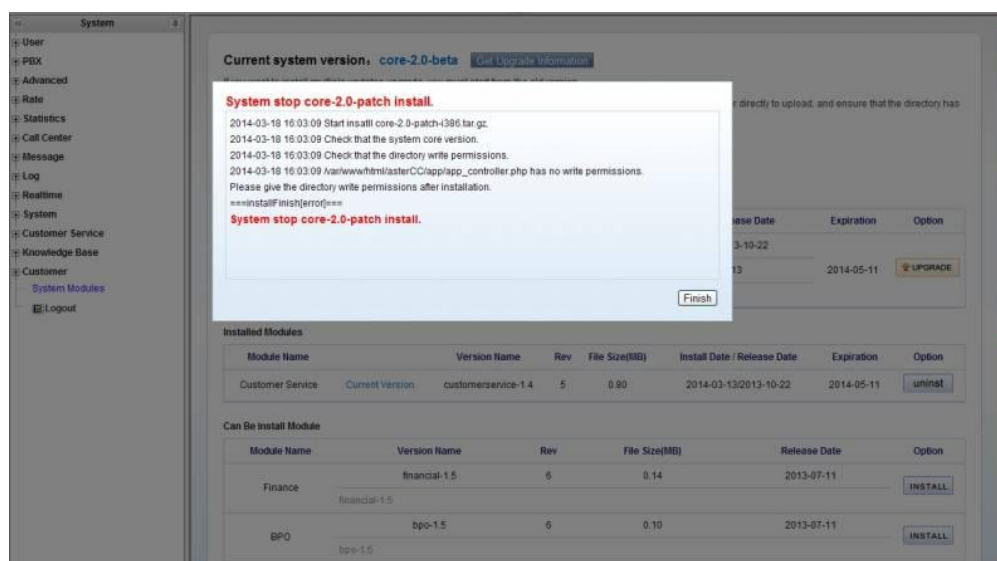


- Configure file error, like below:



For above problems, you can delete the upgrade file in /var/www/html/asterCC/data/_cache/, then re-download the upgrade package file and upgrade again

Stop upgrade process



It doesn't have the system file's permission, so you can login the system by SSH, then execute below code:

```
chmod 777 /var/www/html/asterCC/app/app_controller.php
```

let the app_controller.php file's permission to 777

413 Request Entity Too Large



Use SSH tool to login the system, then execute this code:

```
vi /etc/php.ini
```

open the PHP configure file, and find :

```
upload_max_filesize = 20M
```

change 20M to 80M (the value need to high the file size of upgrade package)

```
upload_max_filesize = 80M
```

and execute :

```
vi /usr/local/nginx/conf/nginx.conf
```

open the nginx configure file, find:

```
client_max_body_size 20M;
```

change 20M to 80M

```
client_max_body_size 80M;
```

save the change, then execute

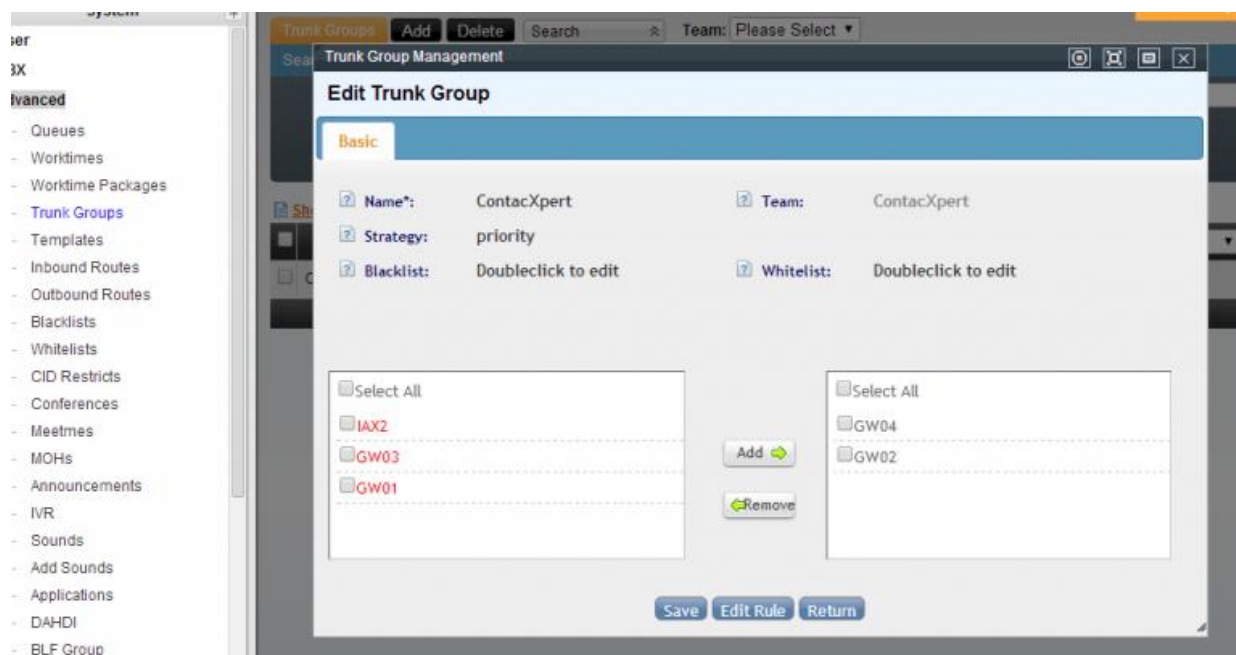
```
service nginx restart
```

restart Nginx server, and upload again.

25 FAQ

25.1 How to configure to use a specific trunk for special numbers

- put all trunks you want to use into one group
- read [trunkgroup](#) for more information for trunk group

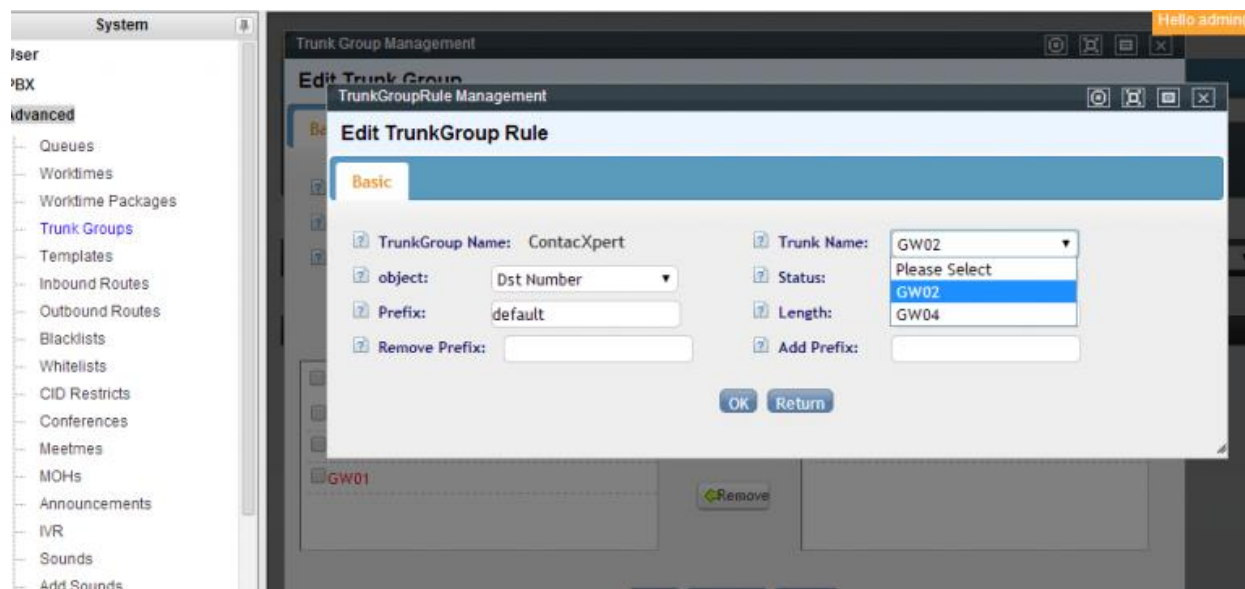


Config trunk rules

- You can use prefix, length and then select a trunk, in this case, if the dialed number match the rule, it will choose the trunk



You can also change caller id for inbound calls from this trunk group



Apply the rule for whole team

- If you want to apply the outbound rules for whole team, just go to team, select this trunk group

System

Team Management

Edit Team

Basic **Advanced**

Name*: ContactXpert Identity*: 100

Max Account Num*: 100 Max Agent Num*: 15

Max Device Num*: 100 Max Queue Num*: 100

Max MeetRoom Num*: 10 Allow Internal Calls: Allow

Trunk Type: Trunk Group **Trunk: ContactXpert**

Agent REC file access: No Access Monitor Force: Disabled

Display Name: Doubleclick to edit Limit Type: No Limit

Credit Limit: 0.0000 Logo: [View](#) [Upload](#)

Language: French

[Agents In Team](#) [Accounts In Team](#) [Devices In Team](#) [Blacklist](#) [Whitelist](#) [Return](#)

Apply the rule for specific users

- If you only want some user to use this rules, you can group the users to one account group, and select to use trunk group only for this group.

System

Account Groups

Edit Account Group

Basic

Name*: Scandie Team: ContactXpert

Account: [Edit Account](#) Outbound Route: Doubleclick to edit

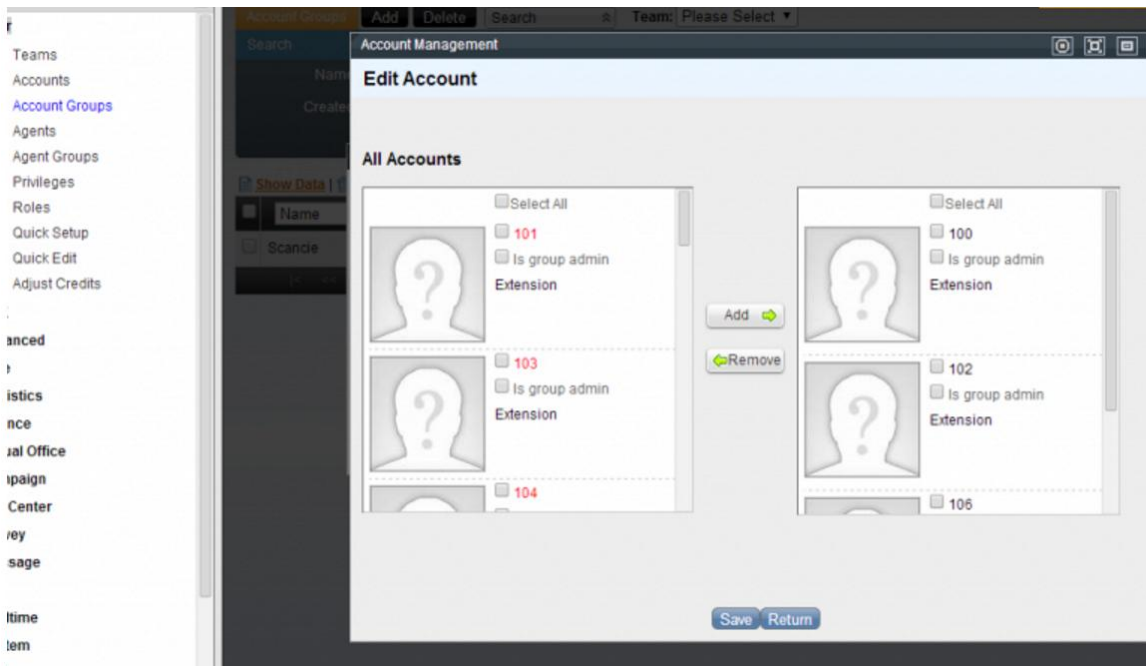
Trunktype: Trunk Group Trunk: ContactXpert

Note: Doubleclick to ...

[Return](#) [Confirm](#)



Agent will use rules which is applied to his account



25.2 The use of astercc rate

astercc provides a multi-level and flexible billing mechanism for users in system. In addition to billing, via different rate, you can set trunk for different numbers, that is, the system will call different numbers to choose according to match the corresponding outbound trunk. Besides outbound billing, astercc also provides the rates for agent when answer inbound calls.

- **System rates**

System rates the system buying rates, this is generally used to bill system outbound cost.

- **Team rates**

Rate of the system sales to team rates, or the cost of team, it can be used for billing on the team.

For the above two rates, we can see the following options:

- **Number Prefix:** The rate matched the called number prefix, for example, "0" for domestic long-distance, "00" indicates an international number, "001" that the United States, using the "default" that can match any number,
- **Number Length:** We can also limit the number of lengths to set the rules, 0 for unlimited
- **Destination:** To this target rate of application of a name, such as "local call", "long" or "U.S."
- **Connection charge:** the rate when call is connected
- **Initial Duration:** for how long we will apply connection charge
- **Rate:** the rate per minute
- **Billing Block:** How long we will charge
- **Team:** Select the application rate of the team (team), if not choice, that the rate can be applied to all the teams, the process of using the system will give priority to matching the

rate within the team, if not find any matches, then it will search the team rate which is did not specify to any team.

- Trunk: the trunk need to get billed



- in systemrate, the team in fact doesnt mean team, it's just used to list the trunks under the team.
- for team admin, team rate is readonly.

- Customer rate: Customer rate is the rate for the end user, also when number rule matched, it will call via the trunk configed in this rate



- in team rate and device rate, when the team is not selected, then for team admin, the rate is read only.

For example, we can set all the teams all use the trunk A, local call, \$0.2 for the first 3 minutes, after that \$0.1 per minute:

prefix: default, destination: local call, Length: 8, connection rate: 0.2, initial duration: 180, billing block: 60 , the rate: 0.1, the team: not selected, trunk: A

In customer rate, besides same parameters in the system rates and the team rates, there is a "group account", that can be classified into a group of some devices in the reunification of rate management, if no account group is selected, means that the rate can be used for any devices.

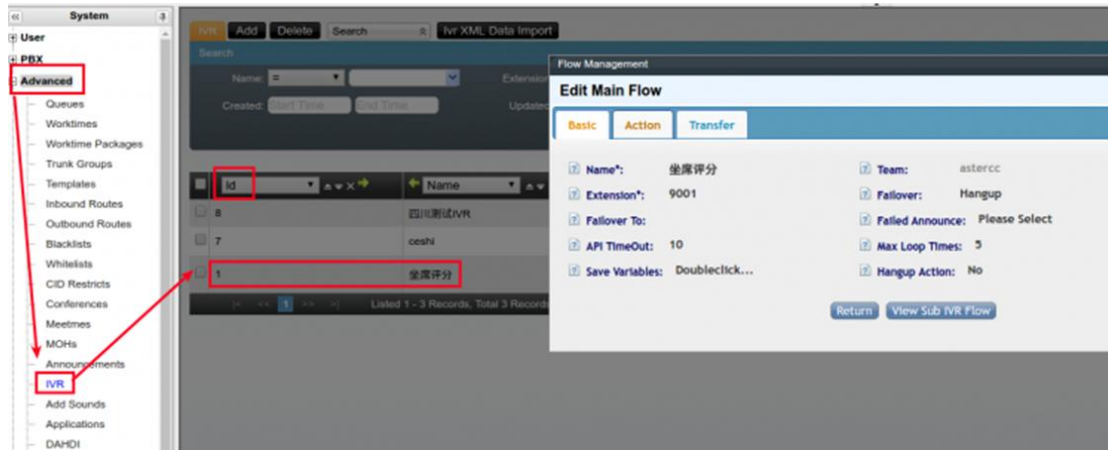
- Agent inbound rates

Rates are for agents answer incoming calls and billing, so dont have prefix and number length. By agent rate, you can pay your agent based the calls he answered, this is often used for part-time agent.

- Agent Group: Agent inbound rate is based agent group, agent in same agent group will share same rate.
- Agent: You can also only set the rate for specific agent, if no select, means the rate will apply in the entire agent group.

25.3 How to Implement After Call Survey for Agent

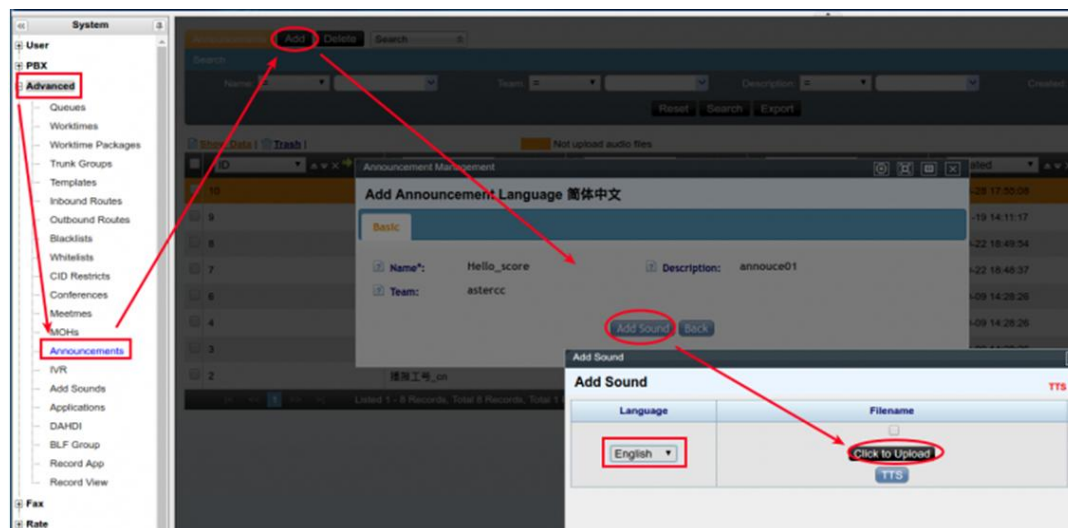
In asterCC system, there is a default IVR of after call survey for agent, but that's a Chinese version, so we should create a new one to implement the survey function.



1. Upload Announcements

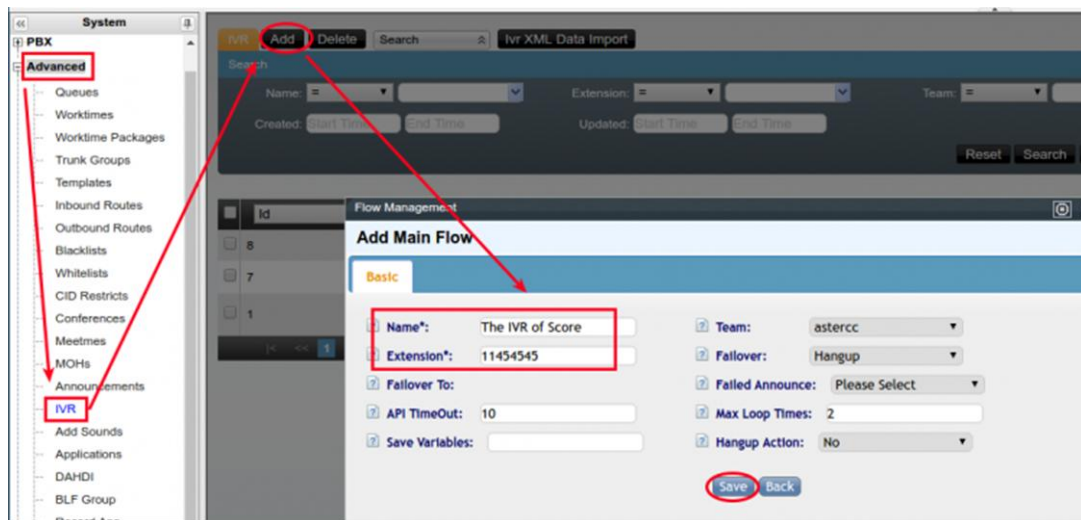
We need upload the announcements which will be used in IVR after hung up, for example: "Please make an evaluation for the service...." "Welcome to call us anytime..." and so on.

On the [Advanced]→[Announcements] page, you can upload announcement via click the [Add] button, as follows:



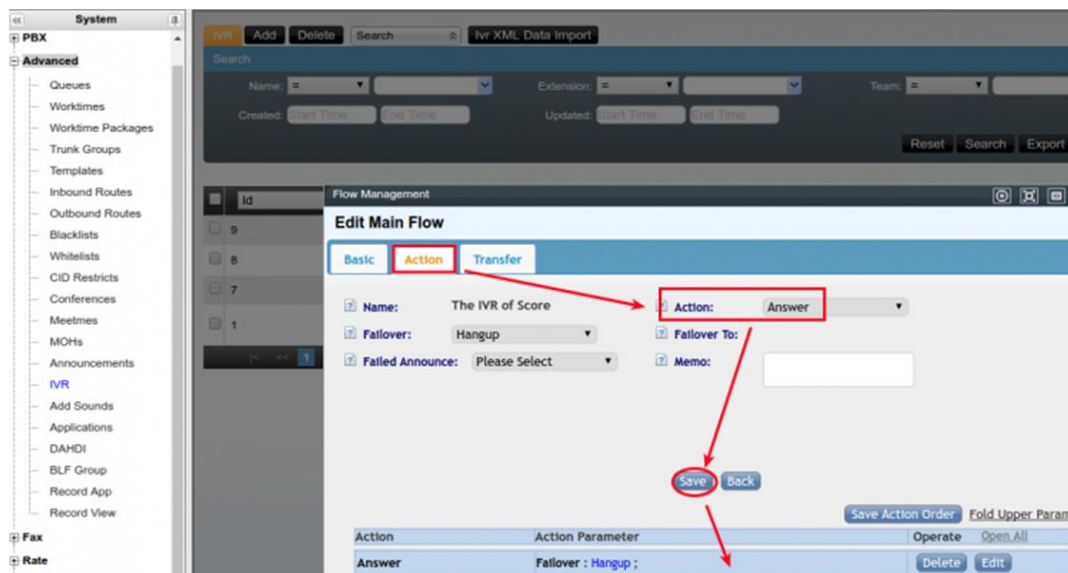
1) Add IVR of After Call Survey

Press the [Advanced]→[IVR] on the left menu to enter the IVR adding page, you can create a new IVR via clicking the [Add] button, as follows:



2)Add the Answer Action

Add the first action,this action is an **Answer** action,as follows:



Add the ReadData Action

Then add the second action whose action is **ReadData**,add the Announcement which we uploaded into it,to prompt the customer enter the evaluation IVR,as follows:

Flow Management

Edit Main Flow

Basic **Action** **Transfer**

Name: The IVR of Score Action: ReadData

Announcement Type: System Announcement *: Hello_score

Loop Times: 2 Save Variables:

Digits Restrict: 0 1 Time Out: 3

TimeOut Announce: Please Select Timeout Replay Menu: Yes

Error Input Announce: Please Select ErrorInput Replay Menu: Yes

Check Transfrom: No Fallover: Hangup

Fallover To: Failed Announce: Please Select

Memo:

Save Back

Save Action Order Fold Upper Param

Action	Action Parameter	Operate	Open All
Answer	Fallover : Hangup ;	Delete	Edit

4)Add the Webservice Action

Last action but not the least, as we use the webservice in asterCC system,so fill the blanks with specific content as follows:

Edit Main Flow

Basic **Action** Transfer

Name: The IVR of Score

WS Address *: <http://127.0.0.1/agentcallrate.php?wsdl>

WS Param: AGENTNO|TEAMID|AGENTGROUPID|sessionid|inputcode|callerid|MODELTYPE|MODELID

Action: Webservice

WS Function *: saverate

WS Return:

Failover: Hangup

Failed Announce: Please Select

Globalvar:

Fallover To:

Memo:

Save Back

Save Action Order Fold Upper Param

Action	Action Parameter	Operate	Open All
Answer	Fallover : Hangup ;	Delete	Edit
ReadData	Announcement Type : System ;	Delete	Edit

- WS Address:** <http://127.0.0.1/agentcallrate.php?wsdl>
- WS Function:** saverate
- WS Param:**
AGENTNO|TEAMID|AGENTGROUPID|sessionid|inputcode|callerid|MODELTYPE|MODELID

5) Add the Failed Transfer



The Conditions' value in transfer isn't the score for agent, it is the return parameter of webservice.

The

first condition is 0:

Edit Main Flow

Basic Action **Transfer**

Name: The IVR of Score

Conditions: 0

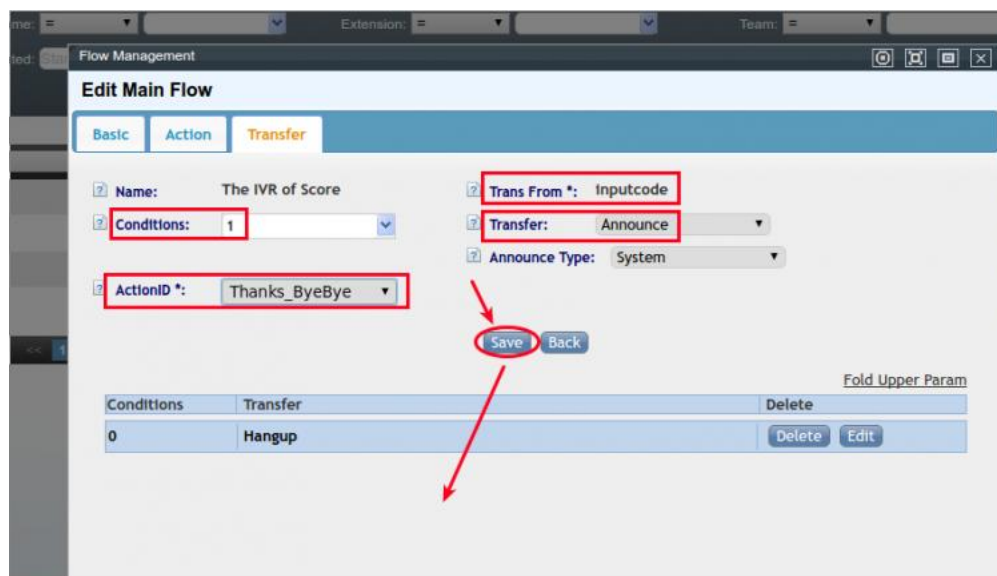
Trans From *: inputcode

Transfer: Hangup

Save Back

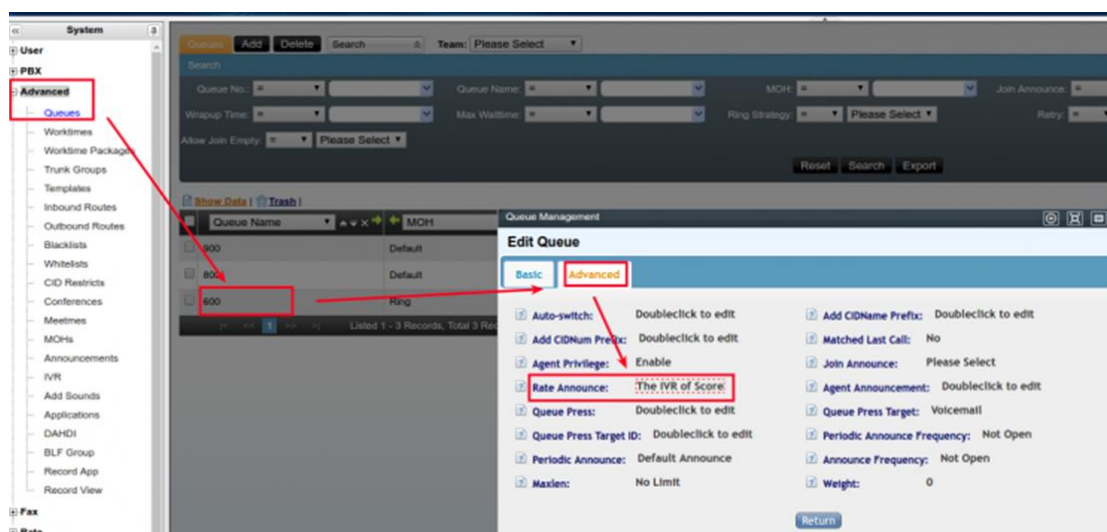
6) Add the Success Transfer

The second condition is 1:

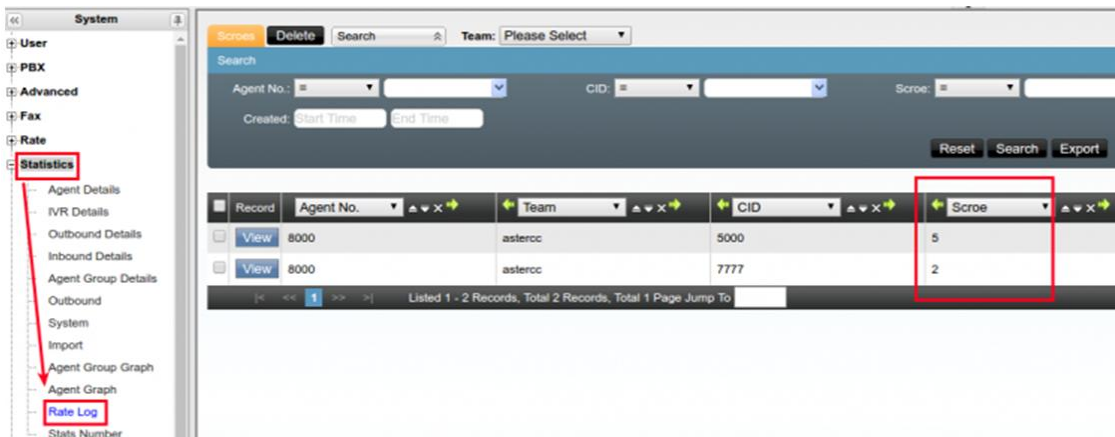


2.Assign the IVR to Queue

Double-click the [Advanced]→[Rate Announce] under [Advanced]→[Queues] directory,as follows:



You can enter the [Statistics]→[Rate Log] directory below to evaluate agent:



25.4 What is the difference between Login, Logout, Checkin and Checkout

- Login: means the agent or the account enter the system with his username password
- Logoff: means the agent or the account exits the system, this action may be actively log out, is also possible that the system log off the user due to timeout.
- Checkin: means agents get into the queue and ready to work, so the queue will send calls to him based queue rules
- Check out: that agents exit from the queue, the queue will not send calls to him any more.

For the agents, in general, when logoff he will also check out, but if there are two browser login and checkin with the same agent account, then one of them close the window, the system will keep the agent status as checkin, and then when the second agent logoff or close the window, the system will automatically check him out.

25.5 How to choose dial method in campaign

asterCC provides several dial methods in a campaign, here we list how they work and what scenario they could be used in

	Direct Dial	Click to call	preview dial	auto dialing	predictive dialer
Method	Dial out via phone	Click the icon next to phone number	Open a customer in the mean time system dial	Click auto-dial button, system open customer one by one and dial	In dialer page, start dialing according to a specific policy
Scenario	Regular Company	agent want to read customer profile before talk	agent wants to control the progress	call to specific customers, like customer care	low answering rate, more than 10 agents

Realm	agent	agent	agent	agent	agent group
-------	-------	-------	-------	-------	-------------

25.6 How to Setup Recording



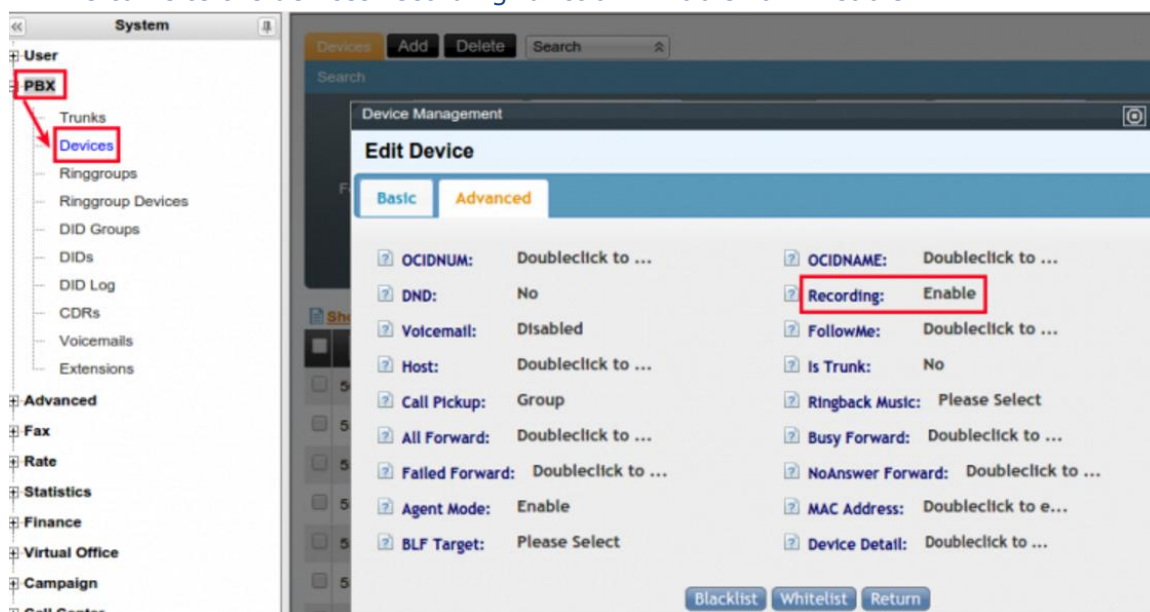
Recording can be sited in four places, there are Teams, Users, Agents and Devices

Agents' calls recording

- Agents' calls means the conversation started or accepted by agents. In asterCC, all of agent's calls could be monitor force automatically, needn't to site manually.

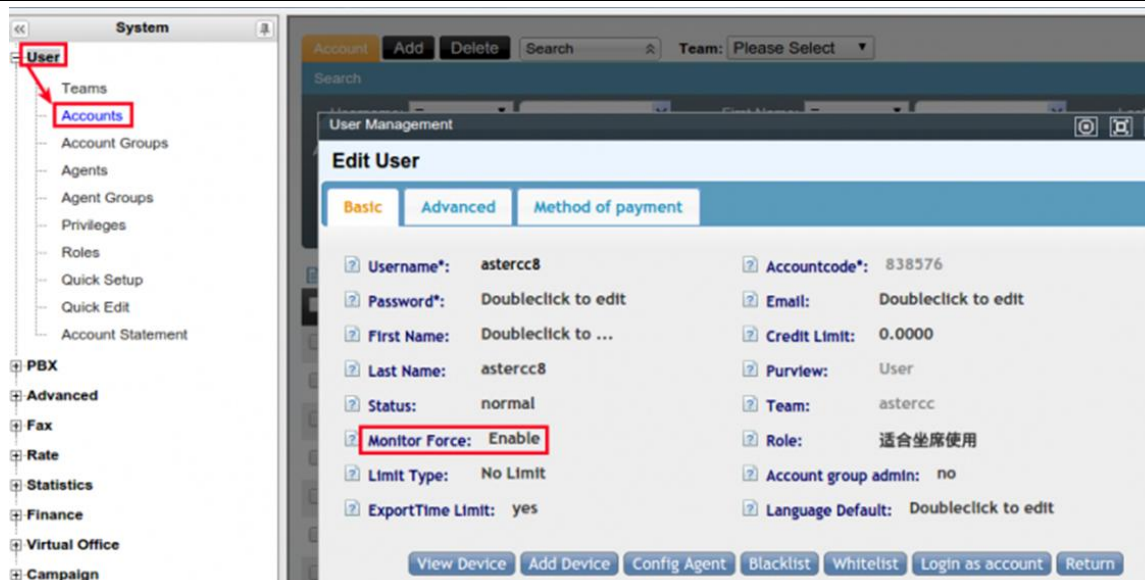
Devices' calls recording

- Devices' Recording
- We can site the devices recording function "Enable" or "Disable"



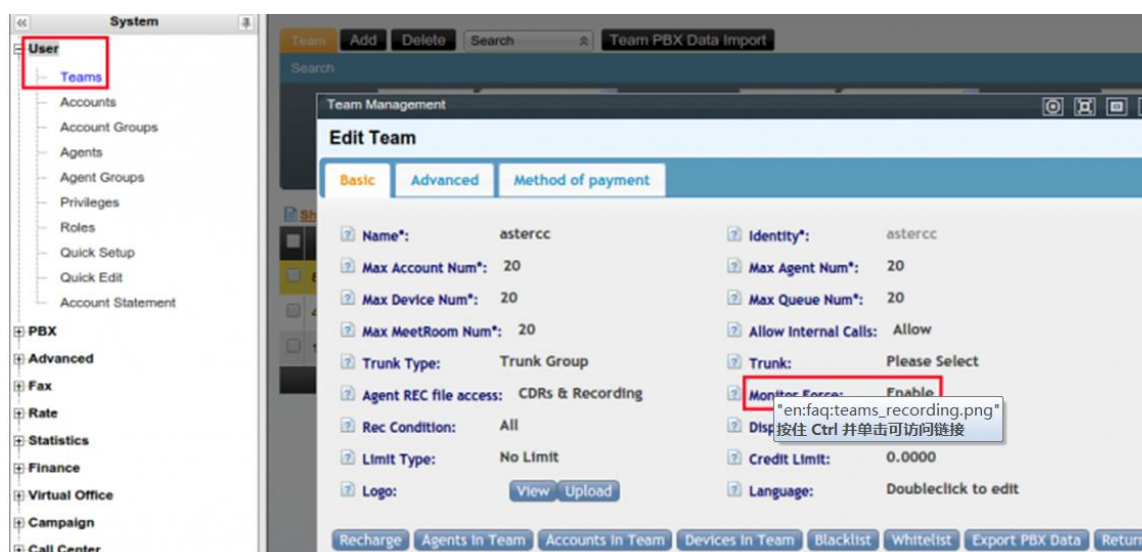
Users' calls recording

- Users' force monitoring:
- We can site recording function of all devices belong this account to be "Enable" or "Disable"



Teams' calls recording

- Teams' force monitoring:
- We can site recording function of all devices belong this team to be "Enable" or "Disable"



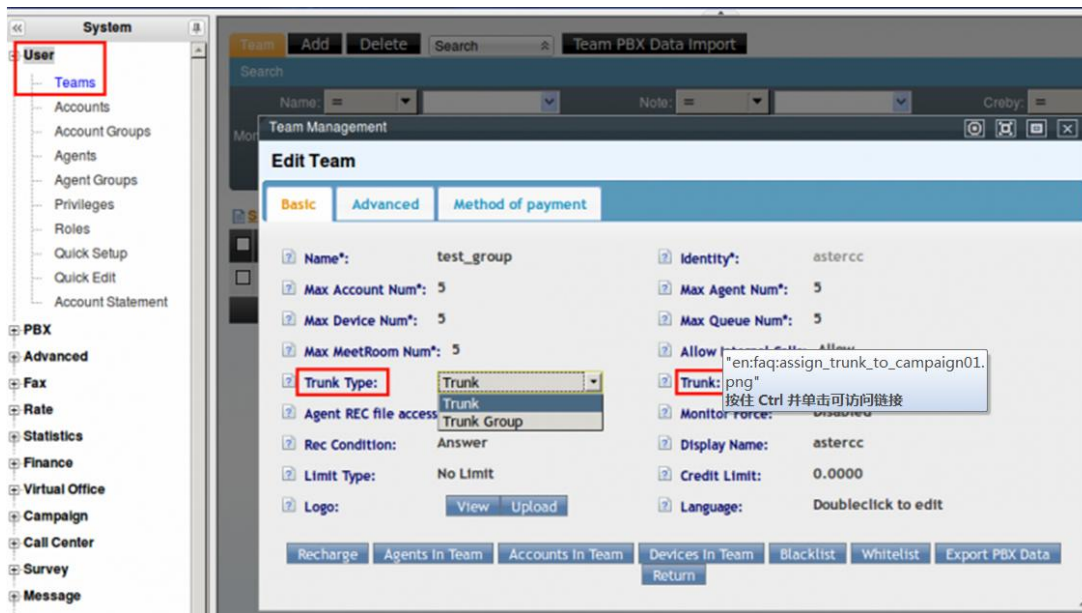
25.7 How to Assign the Trunk to Campaign



Trunk is a route connecting the local telephone network and other telephone network (mainly the traditional PSTN network or other IP PBX system).

Set the Trunk in Team

If the team has one trunk only, you just need change it in teams, as follows:



Set the Trunk in Account Groups

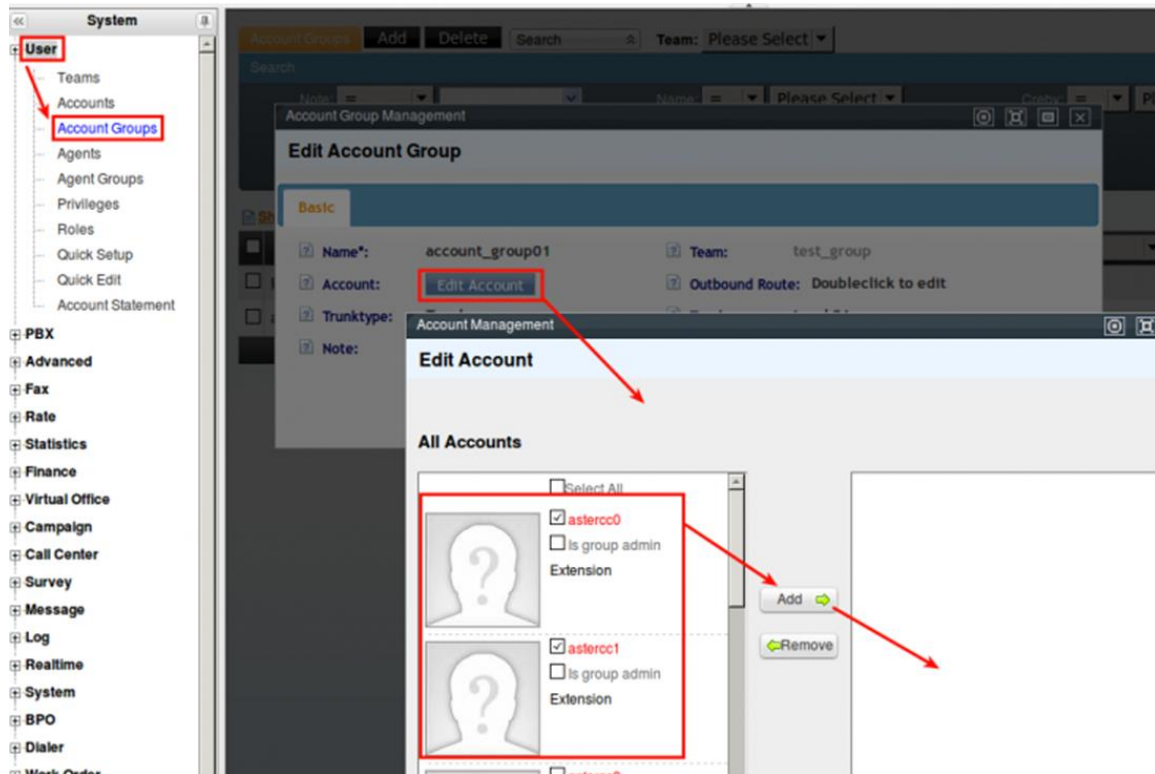


The campaign need bind to a agent group,at the same time,agent has one account belongs to himself.

For example: There are 5 accounts in team named "test_team", the accounts' name from astercc0 to astercc4. The team uses a trunk group named "trunkgroup01", and there are 3 trunks in it, these are trunk01, trunk02 and trunk03. Now, we will assign a special trunk (e.g.: trunk01) or trunk group to campaign, what should we do?

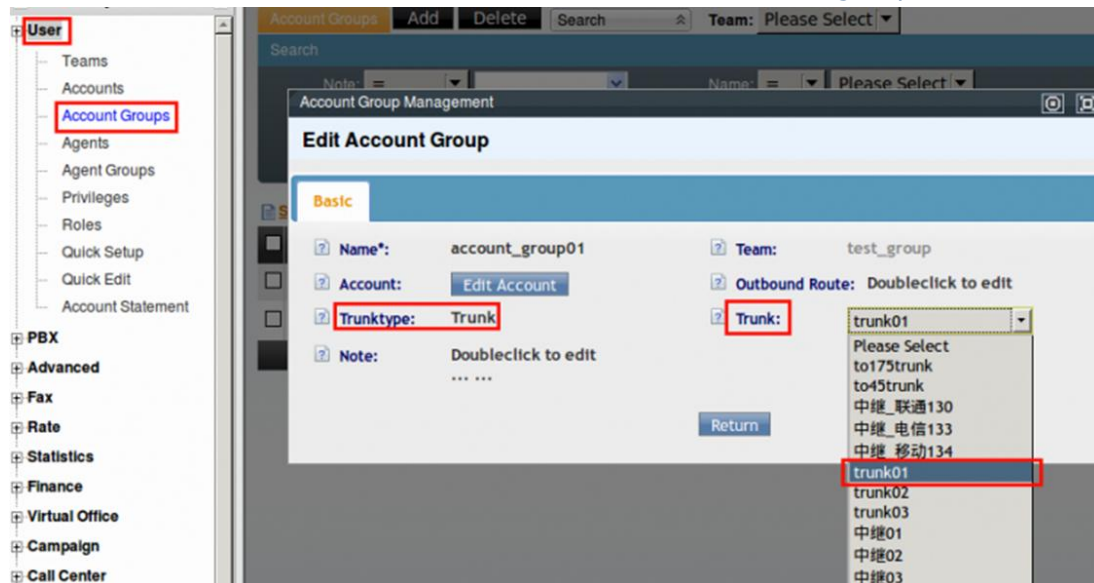
1) Add the Agents' Accounts to a Account Group

e.g.: If we want to use trunk01 dial out when as agent01 or agent02, we should add astercc0 and astercc1 to account_group01, as follows:



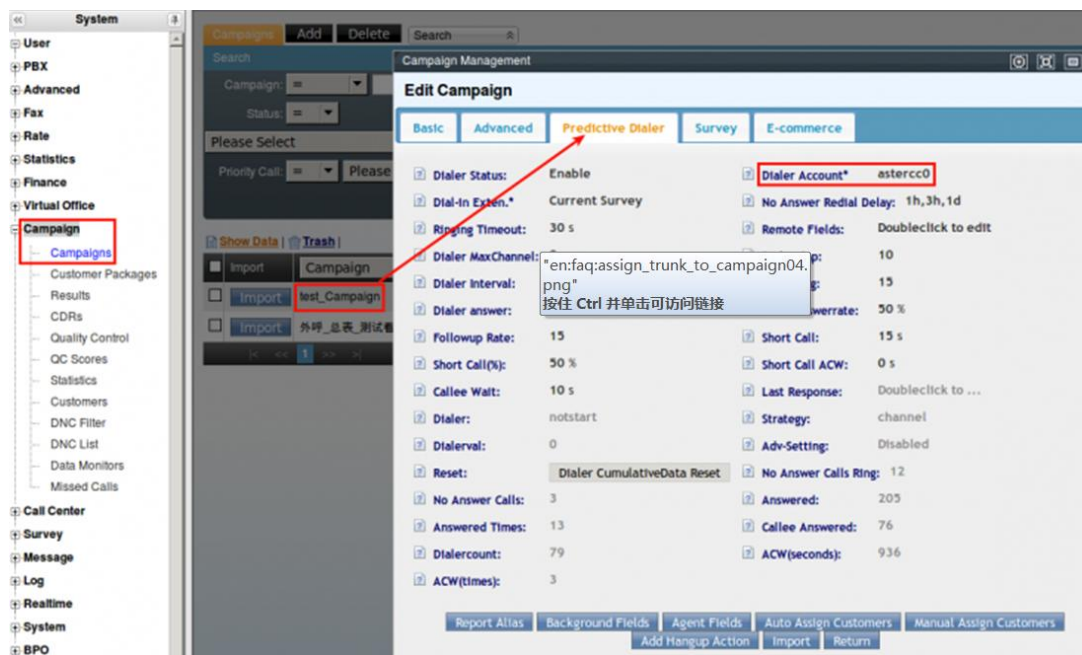
2)Assign the Trunk(or trunk group) to Account Group

Then, we should bind trunk named "trunk01" to the account group,as follows:



How to Assign the Trunk to Predictive Dialer

If dial out through Predictive Dialer,we should appoint the account belongs to account_group01 to assign the trunk, as follows:



25.8 How to edit the SMTP Server to send voicemail

How the system choose the SMTP Server to send the email?

1. According to the voicemail owner's team, search whether there is a SMTP server of this team. If it exists, then use it to send the email.
2. If no SMTP Server on Step 1, then use the default SMTP server which do not belong to any team.
3. If no SMTP Server on Step 1, Step 2, stop send the voicemail

Now, we know the rule which how to choose the SMTP Server, then we can edit the satisfied SMTP Server to send the voicemail

25.9 How to Control Concurrent Calls in Predictive Dialer

The Trunk Provider

Above all, we should recognize the maximum volume of trunk that bought from provider.

System

Open the left management list, click [Realtime]→[System Messages], you can see the "Max. Dialer Concurrent Calls" on the message page of whole system, as follows:

Teams

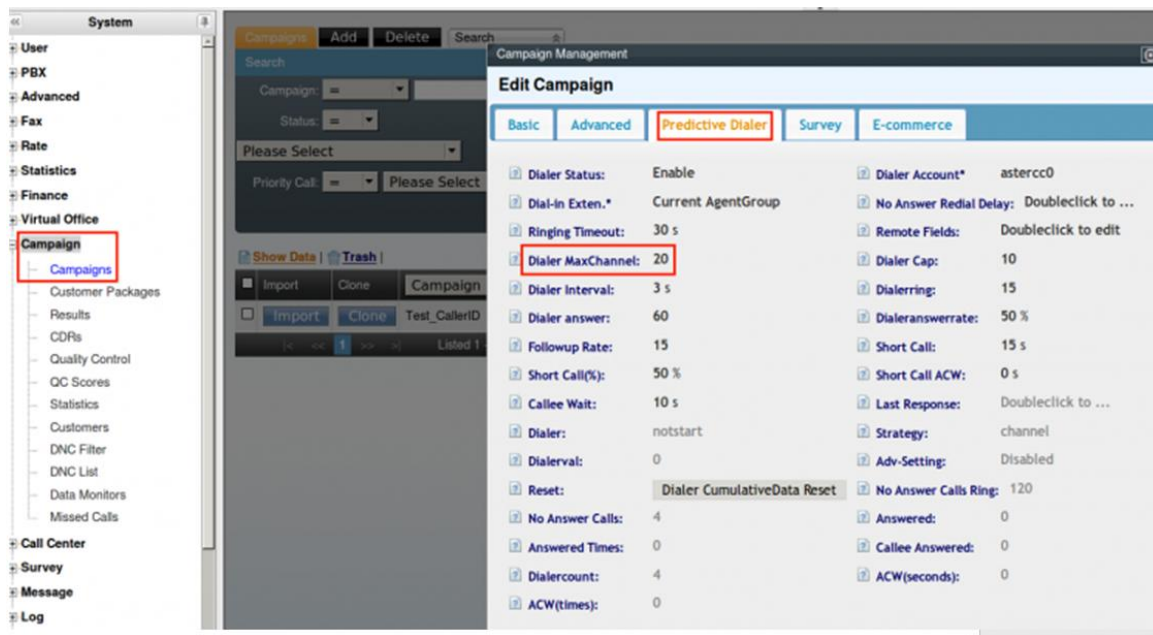
Open the management list on the left, click [Dialer]→[Dialer Setting], you can see the “Max Dialer Concurrent” of all teams, “-1” means “No Limitation”, as follows:



If your trunk bind to one team only. To avoid wasting customer data which caused by inappropriate setting of dialer, you can set the maximum volume of trunk here.

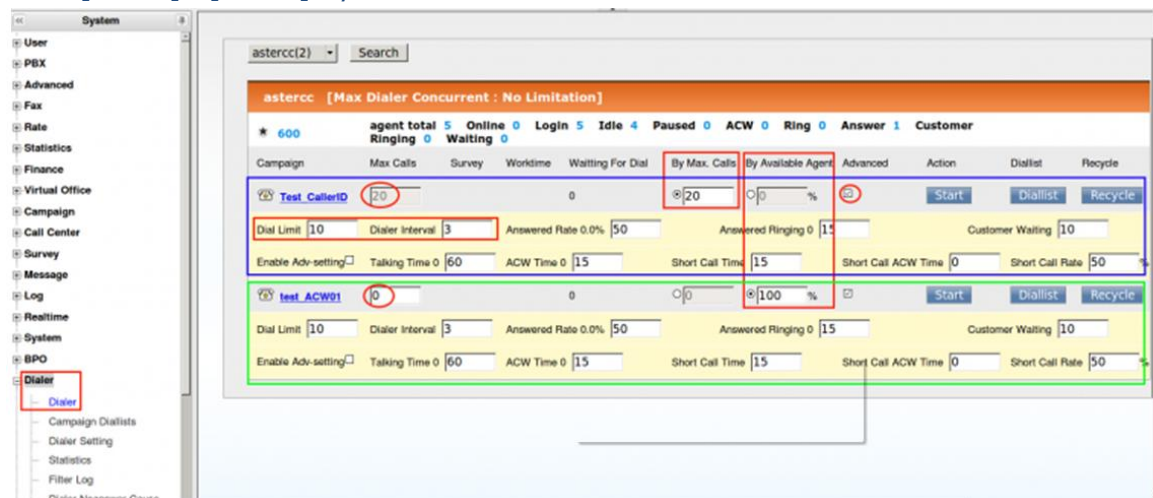
Campaigns

Besides setting in System and Teams, we also set the “Max Dialer Channel” in campaigns. Click [Campaign]→[Campaigns], under “Predictive Dialer” label, there is a field named “Dialer MaxChannel”, it will worked as “Max Calls” on “Advanced” page of Dialer, 0 means “No Limitation”, as follows:



Advanced of Dialer

Click [Dialer]→[Dialer], you can enter the dial console, as follows:



Note:

Max Calls: This value can be set in campaign above. 0 means "No Limitation".

When dialer use "By Max. Calls", although the value of "By Max. Calls" higher than "Max Calls", the number of concurrent will reduced to "Max Calls" automatically.



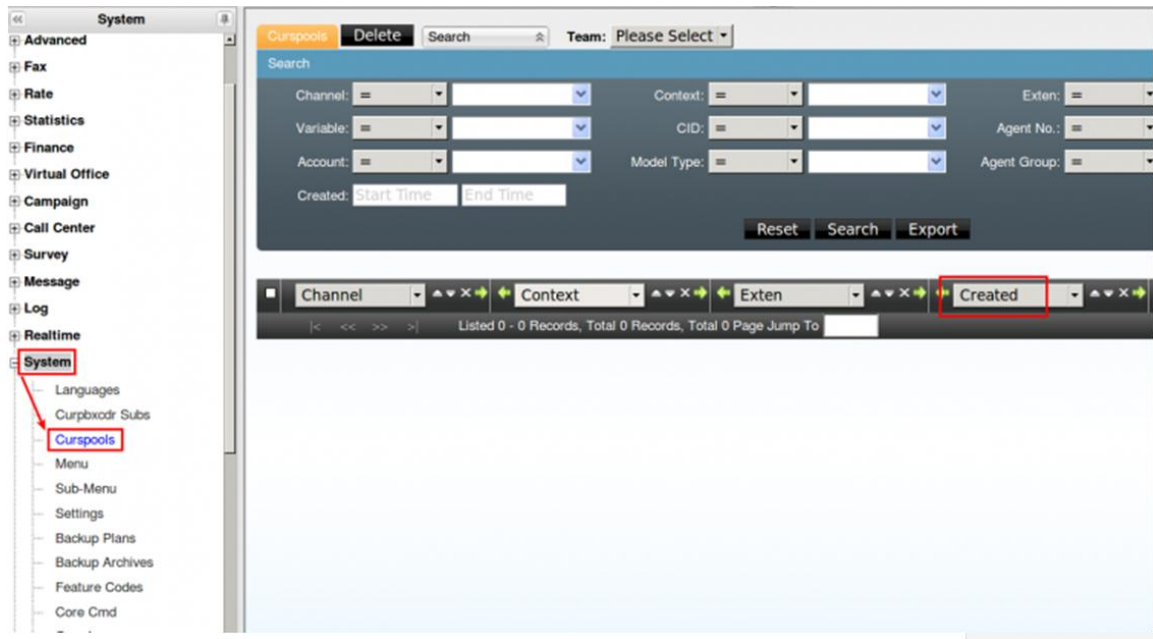
When dialer use "By Available Agent", the number of concurrent=(Logged Quantity × Percent of Available Agent)/Answered Rate. No matter concurrent you set up, it no more than "Max Calls".

Dial Limit: How many calls are going to be dialed each time.

Dialer Interval: How often does the predictive-dialer dial.

Curspools

If the concurrent still as much as before, and less than your expected value after settings above. Please check the data in [System]→[Curspools] ordered by "Created", if the created time of data is long time to now, for example: more than half an hour and so on, we can treat them as wrong data. Please select and delete the wrong data, as follows:



Many calls can only continue 1-2 seconds, this kind of calls can't be displayed on concurrent page, but it can occupy the actual concurrent of trunk.

r

25.10 Enable the Google Map

Setting

On the setting page, you can find the google map under the `system setting` tag



- If enable the Google map, set it to yes
- If disable the Google map, set it to no



If the system can not connect to the internet, please do not enable the Google map. It will cause the agent portal page load slowly



As above, the purpose may be:

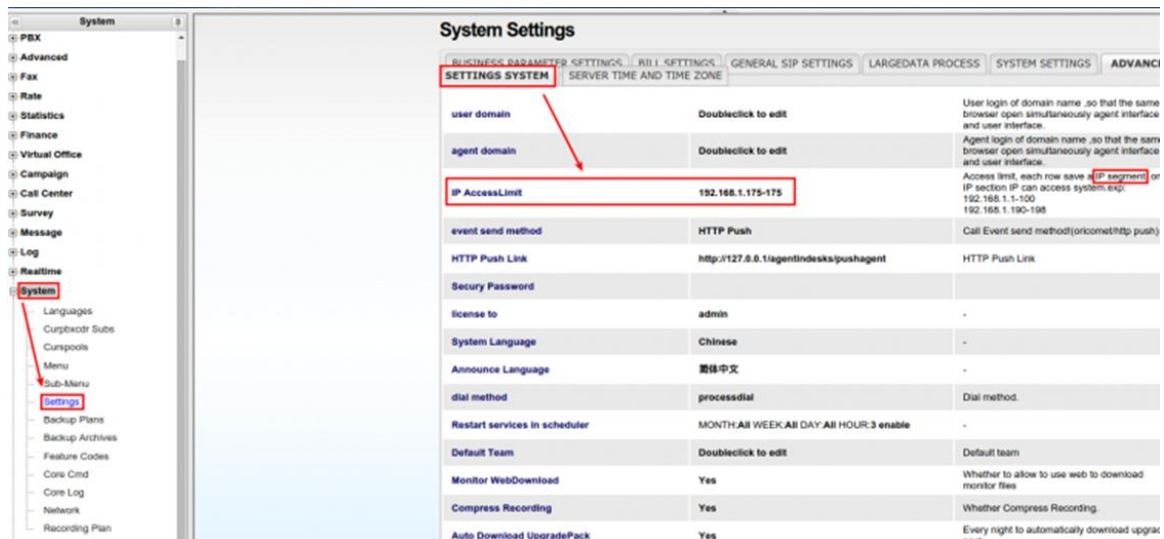
- System can not connect to internet
- Google map is disabled
- Google map file loaded failed

25.11 How to Cancel the IP AccessLimit

The purpose of IP AccessLimit is to specify which IP can be allowed to log in this system. If you set "192.168.1.175" to AccessLimit only, you should write it as: 192.168.1.175-175.

Modify the Setting in VINA-PBX System

Click [System] → [Settings] → [ADVANCED SETTINGS SYSTEM], you can cancel the limit of IP segment via double-click it, as shown below:



It means that access of IP is not prohibited when it saves nothing.

25.12 Difference and connection between Account, Agent and Device

- Account: mainly used for management systems, including system admin, team admin and users
- System admin: to manage the entire system, have full privilege in system.
- Team admin: to manage a team, have full privilege in a team, including accounts, seating, and PBX and so on.
- User: the basic unit in astercc, and is charging unit, a user may include zero or more agents and devices.
- Device: device can be divided into internal and external extension, between devices, they can reach each other by dialing extension number.
- internal device: internal device is device connect to the asterisk, such as SIP, IAX or DAHDI (ZAP), internal device can be reach by extension number, and when internal device dial an outside line, the system will calculate the costs will be incurred to the user which belongs to.
- external device: refers to an ordinary telephone number, such as mobile or landline, external device can only receive calls.
- extension: Each device will have an extension number, internal device can dial the extension number to reach the others, for example, extension 5000 is an external device (number 041139735857), then some internal device dial 5000, the system will try to call the number 041139735857.



- When external device receive calls from the system, the costs incurred will be recorded in the corresponding accounts.

Agents: for call center operations, including inbound and outbound campaign, before work, agents will first be allocated to different agent groups and then assigned to different campaign, when adding agents, we need to choose an device for the agent, or input an outside number.

25.13 How to choose dtmf mode

What is DTMF

DTMF (dual tone multi frequency) is the signal to the phone company that you generate when you press an ordinary telephone's touch keys.

What's DTMF for

Without correct DTMF, a IVR could not understand what's customer input.

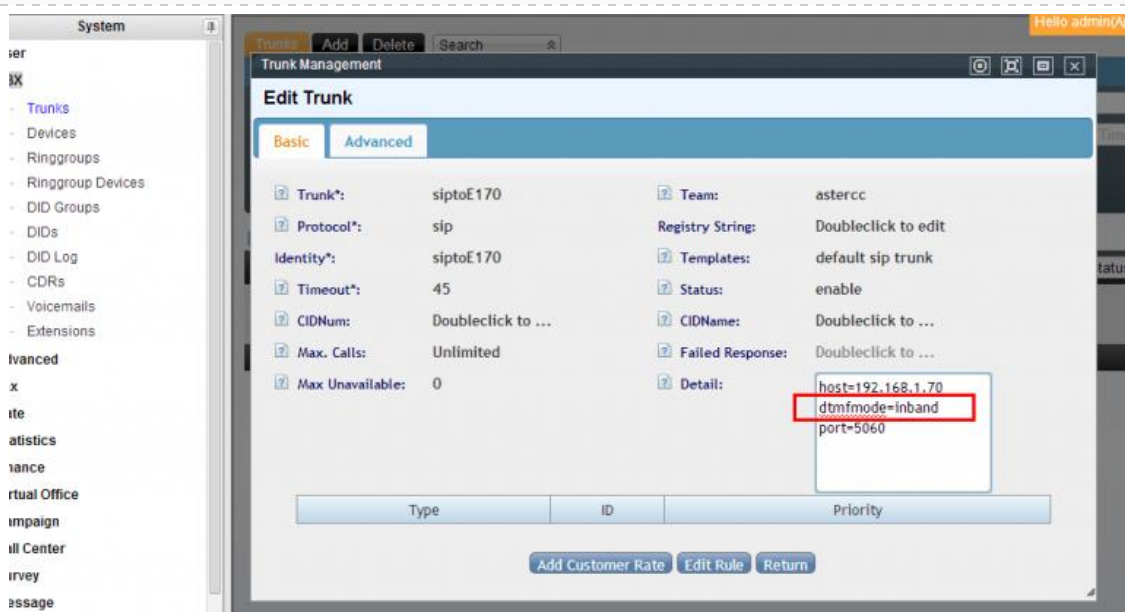
Set DTMF

Usually we just need to make sure it's using correct dtmfmode in the trunk. The option is dtmfmode= the options are

- auto
- inband
- info
- rfc2833

For example

```
dtmfmode=rfc2833
```

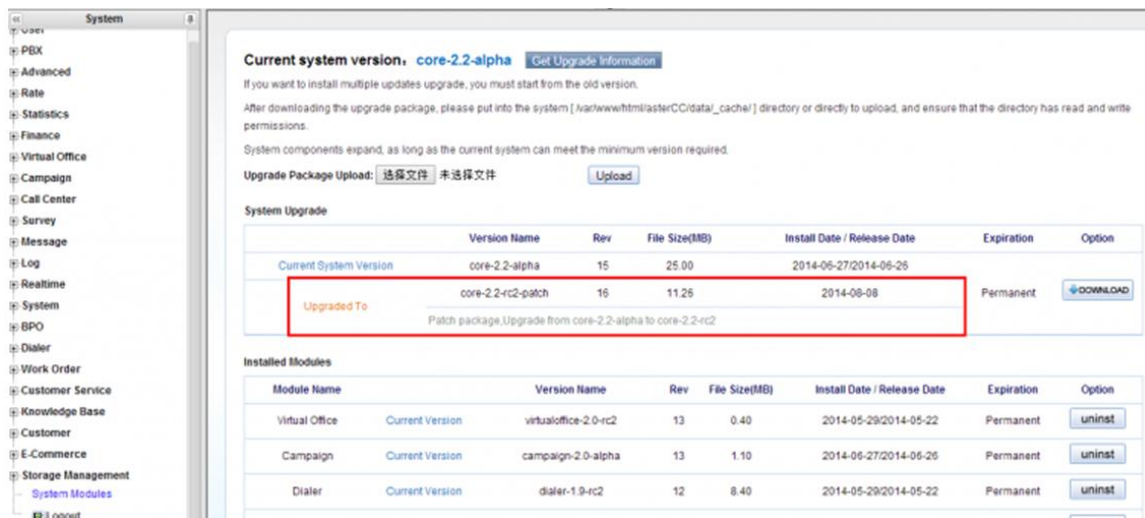


How to config DTMF

- For inbound/outbound, you need to make sure you configured correct dtmfmode same as your provider asked, in most case, use rfc2833
- When you are using inband, the codec need to be ulaw or alaw

25.14 How to upgrade system

- When there's a new version available, you can find the information in System Modules



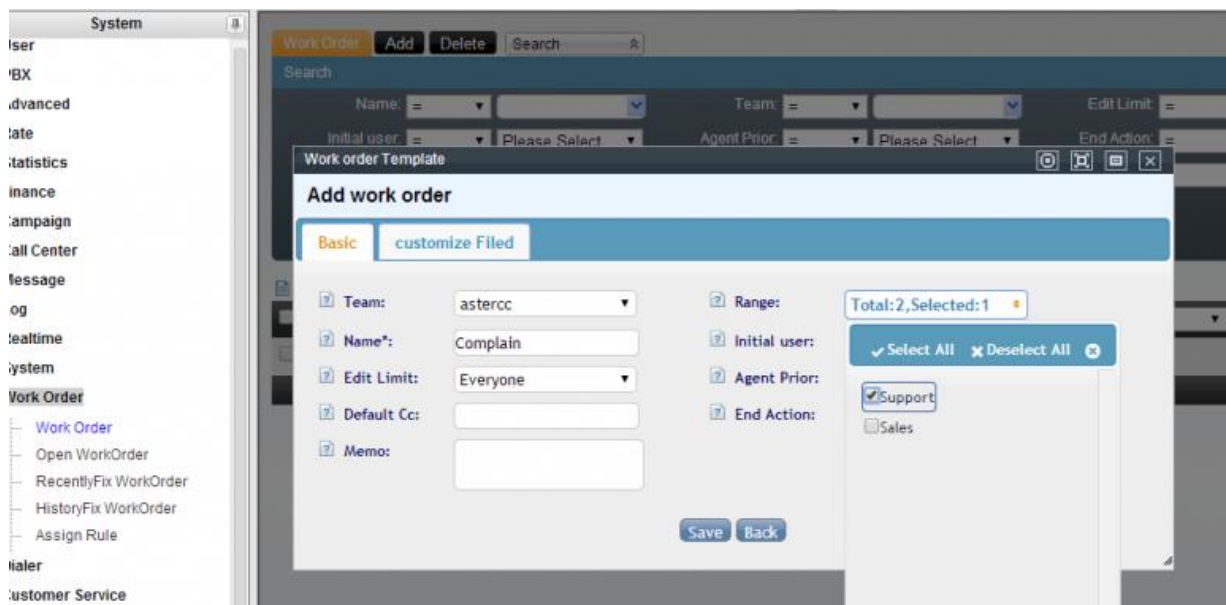
- Download the upgrade package, for core upgrade, usually it is very big, not easy to upload via GUI, you can download to your local computer and then upload to server via FTP or SFTP, or you can ssh to the server and download to VINA-PBX directly
- When you upload (or download) the package, refresh the page, you can find the "Upgrade" button
- Click the button to perform the upgrade

26 How To

26.1 How to use work order in campaign module

1)Config Work Order

- Create a work order, in Range, you need to select which agent group(s) could use (create or get involved) in this work order



2) Config Campaign

- To use work order in a campaign, the campaign must use main table

ID	Campaign	Use Main Table
3	Customer Support	Yes
2	Test	No
1	Customer Care	No



You can't change Customer Package when the campaign is created

- Bind the work order to a campaign call result

System

- User
- PBX
- Advanced
- Rate
- Statistics
- Finance
- Campaign
 - Campaigns
 - Customer Packages
 - Results
 - CDRs
 - Quality Control
 - QC Scores
 - Statistics
 - Customers
 - DNC Filter
 - DNC List
 - Data Monitors

Results Add Delete Search

Search

Results

Add Campaign Result

Basic

Name*: Camplain

Status: ANSWERED

Campaign: Please Select

Work order: Complain

Dispose Status: All

Team: astercc

Note:

Save Back

Send Email All ANSWERED

3) Create Work Order in campaign popup

- In the campaign popup, select the call result which is bind to a work order, you can see a link to create the work order

Save Customer

Contact Log

Status: Success Submit

CallResult: Camplain

Create Work Order

Save

Contact Memo:

History Details New WorkOrder Recently Fixed WorkOrder History Fixed WorkOrder

Click for the history of contact records

|< << 1 >> >|

The screenshot shows a web application interface for 'Enterprise Work order Management'. A modal dialog titled 'Add work order' is open. It contains the following fields: 'Title' (text input), 'Cc' (text input), 'Group' (dropdown menu with 'Support' selected), and 'Description' (text area). At the bottom of the dialog are 'Save' and 'Back' buttons. The background interface shows a sidebar with 'Enterprise' and 'OutboundIndivi' dropdowns, and a main area with tabs for 'History Details', 'New WorkOrder', 'Recently Fixed WorkOrder', and 'History Fixed WorkOrder'. A link 'Click for the history of contact records' is visible below the tabs.

4) Create Work Order as group admin

- If agent is group admin, he can go to Group Work Order to create one

The screenshot shows the 'astercc' web application interface. The top navigation bar includes 'Portal', 'GroupAdmin', 'Dialer', 'Campaign', 'Call Center', 'Work Order', 'Customer Service', and 'Knowledge Base'. The 'Work Order' tab is active, and the 'My WorkOrder' button is highlighted with a red box. Below the navigation bar, the 'Group WorkOrder' tab is selected. The 'Add Work order' dialog box is open, showing a 'Basic' tab. It contains the following fields: 'Title' (text input), 'Cc' (text input), 'Model' (dropdown menu with 'Campaign' selected), 'Model ID' (dropdown menu with 'Customer Support' selected), 'CustomerTable' (dropdown menu with 'outbound_individuals' selected), 'Customer' (text input with 'Please select customer'), 'Group' (dropdown menu with 'Support' selected), and 'Description' (text area). At the bottom of the dialog are 'Save' and 'Back' buttons. The background interface shows a sidebar with 'Assign', 'Add', and 'Complain' buttons, and a main area with tabs for 'My WorkOrder', 'My Created', 'Group WorkOrder', and 'Group Created'.

26.2 How to config a campaign

In a campaign, we will import customer information first from a csv or excel file, then we can assign the customers to agents, agent login and dial the customer one by one, they can select the call result, make a scheduler for next call or mark the customer as failed/success.

During the call, if customer is interested, agent could send email/SMS/fax in agent portal page.

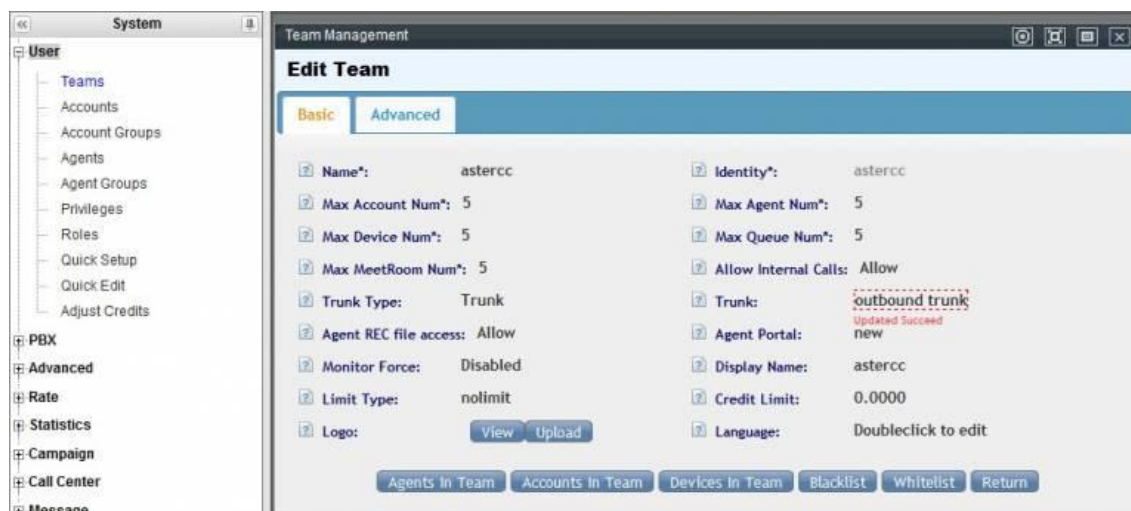
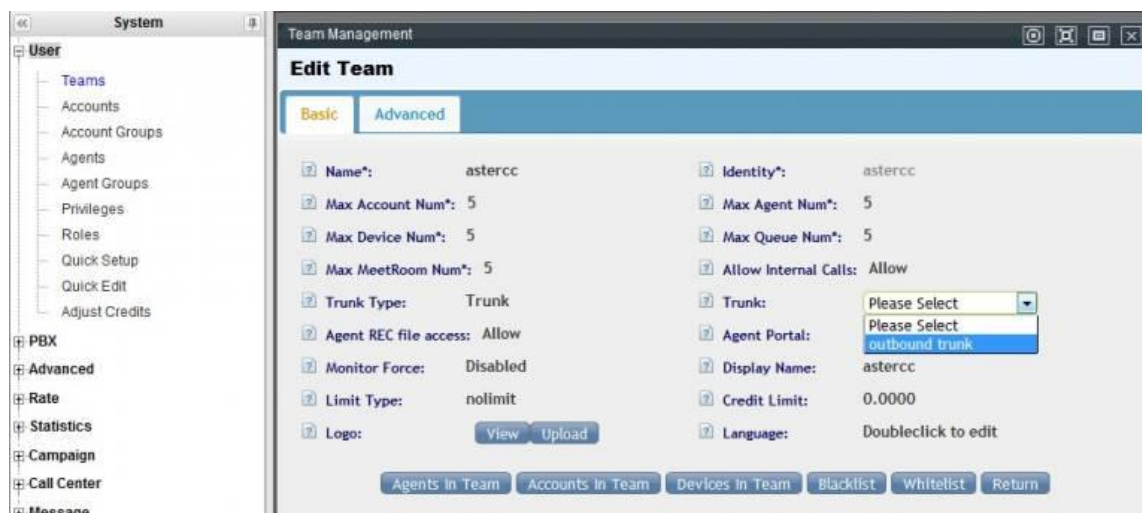
We will learn how to config the following features in asterCC:

1. setup a phone system
2. config a campaign
3. import customers and assign
4. agent portal
5. config email server
6. config fax

3)Outbound Testing

Now we test if the extension of the team can call

- assign the trunk to team, and make every call placed by this team go trough this trunk



- in the menu on the left, PBX→Devices, choose an unused extension and double-click it to check its login name and password

Top Screenshot: Devices Management

Search filters: Device, VM Email, Allow Dial, Status, CIDNum, Account, OCIDNum, Type, Ext No., DND, Created, Updated.

Device	Account	Ext. No.	Allow Dial	CIDNum
5004(5004)	astercc4	5004	Yes	5004
5003(5003)	astercc3	5003	Yes	5003
5002(5002)	astercc2	5002	Yes	5002
5001(5001)	astercc1	5001	Yes	5001
5000(5000)	astercc0	5000	Yes	5000

Listed 1-5 Records, Total 5 Records, Total 1 Page Jump To

Bottom Screenshot: Edit Device

Device Management: Edit Device

Basic | Advanced

Device Name*: 5000 | Ext. No.*: 5000

Username*: astercc-5000 | Secret*: temp123

Team*: astercc | Account*: astercc0 (1)

Device Type: sip | CIDName: 5000

CIDNum: 5000 | Templates: default sip device

Status: Enable | Timeout: 30

Allow Dial: Yes

Buttons: Blacklist, Whitelist, Return

- Register a soft phone
- try to call, and if there are problems, continue the checks on the trunk.

4) Creating Agent Group

To achieve better service, we need to build a agent group to answer the customers who need operator services.

- In the menu on the left, choose User→Agent Groups,and *Add* agent group.
- Portal: When agents login the agent interface, the system will open a page by default. Here we choose *default*.

System

User

- Teams
- Accounts
- Account Groups
- Agents
- Agent Groups
- Privileges
- Roles
- Quick Setup
- Quick Edit
- Adjust Credits

PBX

Advanced

Rate

Statistics

Agent Groups

Add Delete Search Team: Please Select

Agent Group Management

Add Agent Group

Basic

Name*: Campaign

Agents in group: Add Agent

Portal: Please Select

Work Way: Optional

CF external: yes

ACW: OFF

Team: astercc

Queue: Please Select

Login Information: no

Outbound: Not Allowed

Shift Type: groupleader

Open Inbound Window: no

Save Back

- Click [Add Agent], and select the agents into the group, then save.
- Here we assign agent number 5000 the monitor of the group.

Agent Management

Add Agent

All Agents

Select All

Add Remove

404

Select All

5000(asterc...)

☒ Set group admin

errorcall

Outbound: Not Allowed

Work Way: Optional

static dynamic

Online Offline

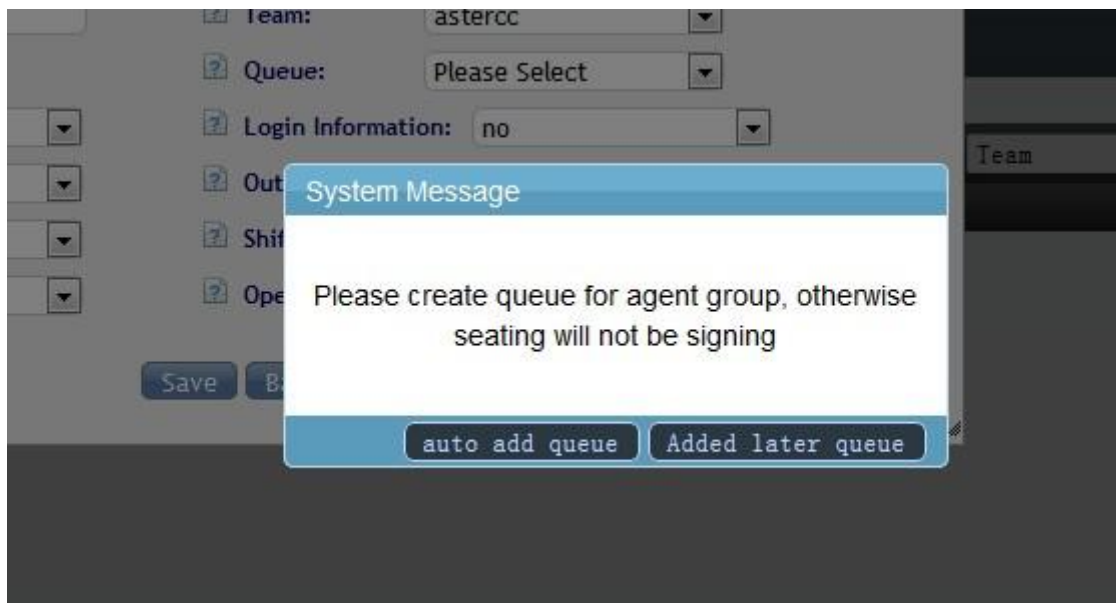
Group

5001(asterc...)

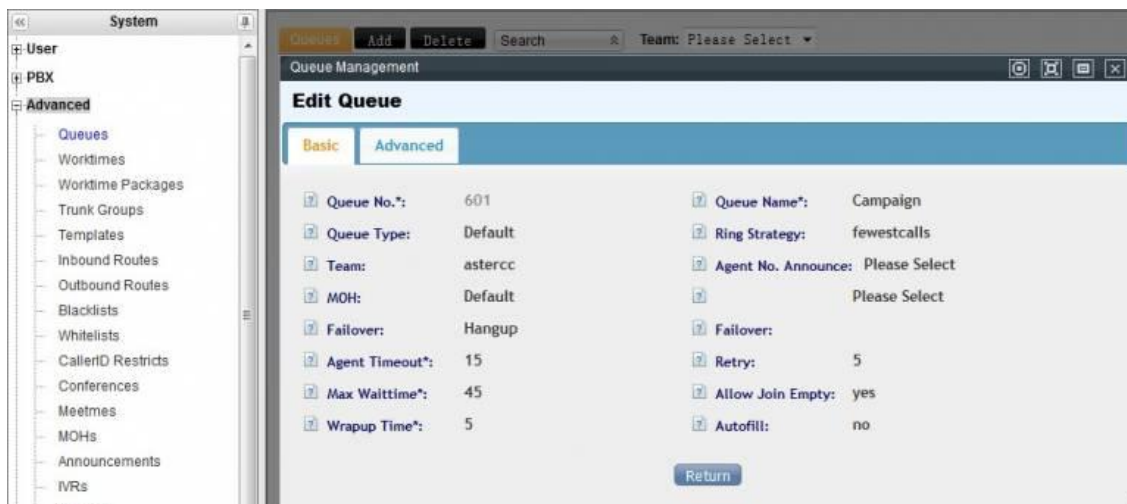
Set group admin

Save Return

- Each group needs a queue, and if the system cannot find there is no queue when you save, there will popup a tip asking if a queue is to be created, and now we choose "auto add queue".



- In the menu on the left, Advanced→Queue: In the Queue management page we can see the automatically added queue. Double-click to modify.
- In this case, agent would not receive calls from the queue, so we don't need to change anything



5)Creating a Campaign

- click Campaign → Campaigns, open the campaign management page, click [Add] for adding a new campaign
- Agent Group: select the agent group "Campaign" which we just created
- Agent Obtain: if agent could get customers information from the customer package of the campaign
- Each Fetch: when Agent Obtain is "yes", we could use this number to set how many records agent could get each time

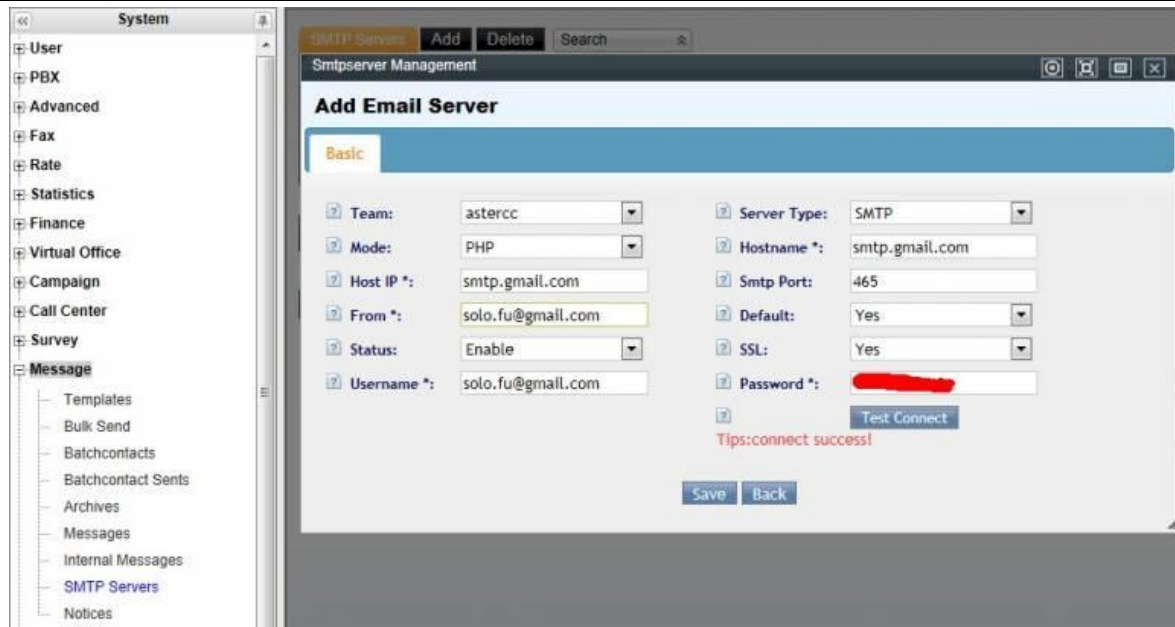
- Agent Max. Own: the max. records agent could get each day
- Customer Package: the target of the campaign, if you dont select one when you add a campaign, system will create an empty one for you.

- click Campaign → Customer Packages, you can see the customer package created by system for this campaign
- a customer package will store the customer information which is waiting for dialing in the campaign.

6)Config a Email Server



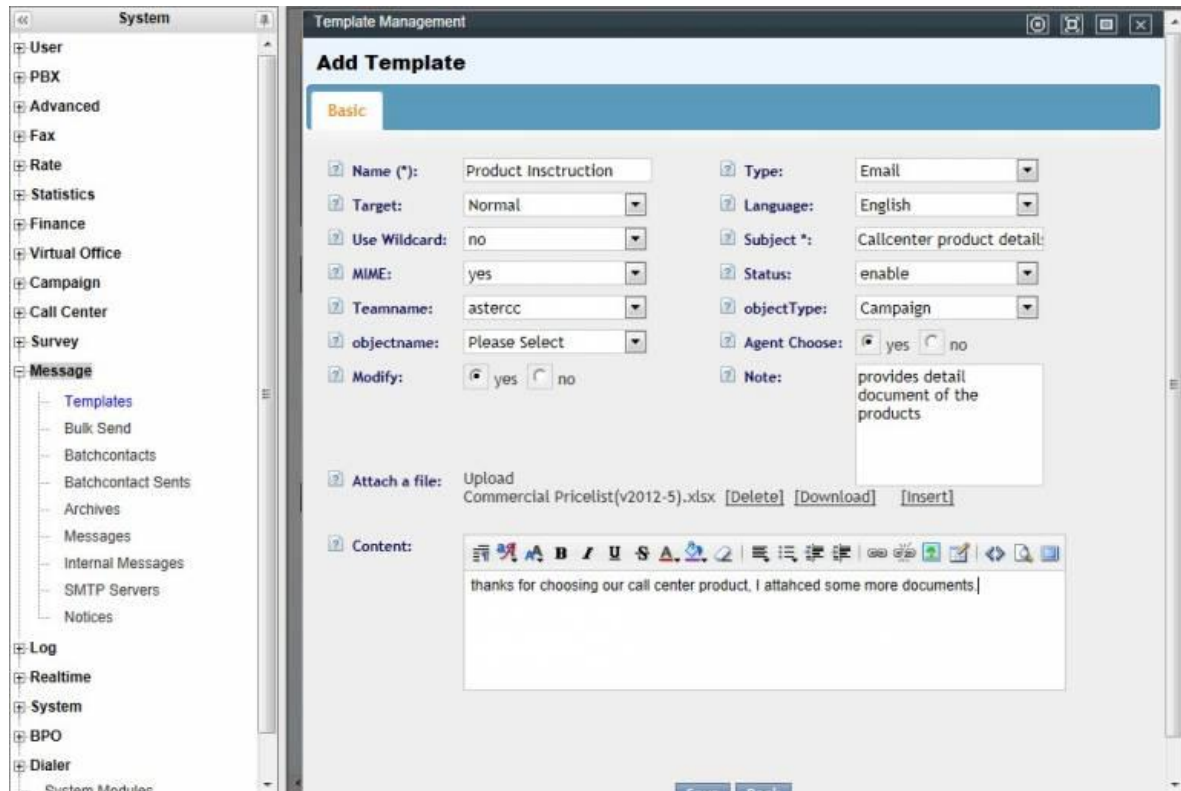
if you dont need send email in the campaign, you dont need a email server, just skip this section



7)Config email template

We could add one or several email templates for the campaign, so agent could select one template to send to customers during the call.

- click Messages → Templates, click [Add]
- "objectType" choose "Campaign"
- "objectname": you could select "Sales" which means this template is only available in this campaign, if not select any, means it's available in all campaigns
- "Agent Choose": "Yes" means agent could choose this template in the campaign
- "Modify": "Yes" means agent could modify the template before sending to customer (this modification would not change the template)



System

- User
- PBX
- Advanced
- Fax
- Rate
- Statistics
- Finance
- Virtual Office
- Campaign
- Call Center
- Survey
- Message
 - Templates
 - Bulk Send
 - Batchcontacts
 - Batchcontact Sents
 - Archives
 - Messages
 - Internal Messages
 - SMTP Servers
 - Notices
- Log
- Realtime
- System
- BPO
- Dialer

Template Management

Add Template

Basic

Name (*): Product Instruction Type: Email

Target: Normal Language: English

Use Wildcard: no Subject *: Callcenter product detail

MIME: yes Status: enable

Teamname: astercc objectType: Campaign

objectname: Please Select Agent Choose: ☒ yes ☐ no

Modify: ☒ yes ☐ no Note: provides detail document of the products

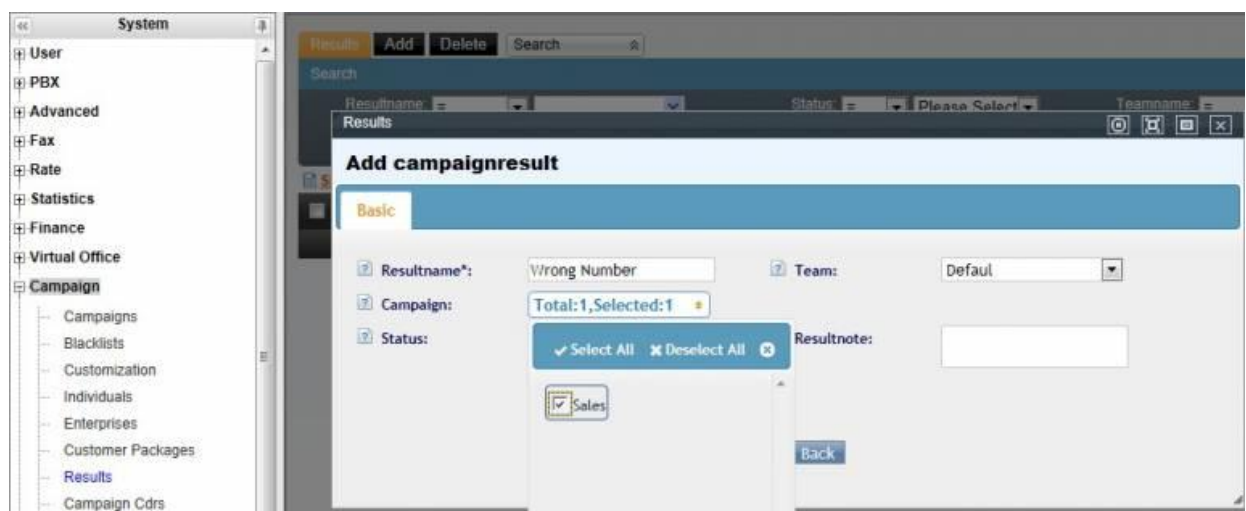
Attach a file: Upload Commercial Pricelist(v2012-5).xlsx [Delete] [Download] [Insert]

Content: thanks for choosing our call center product, I attahced some more documents

8)Config Campaign Result Code

We could config a call code to sort the numbers we called.

- go to Campaign → Results, click [Add]
- the code could be configured for global or just for a team.
- it could be also assign to one or several campaign.
- we could define the result for "Answer" or "No Answer", system will switch based the call automatically.



System

- User
- PBX
- Advanced
- Fax
- Rate
- Statistics
- Finance
- Virtual Office
- Campaign
 - Campaigns
 - Blacklists
 - Customization
 - Individuals
 - Enterprises
 - Customer Packages
 - Results
 - Campaign Cdrs

Results Add Delete Search

Resultname: Status: Please Select Teamname: Team: Default

Add campaignresult

Basic

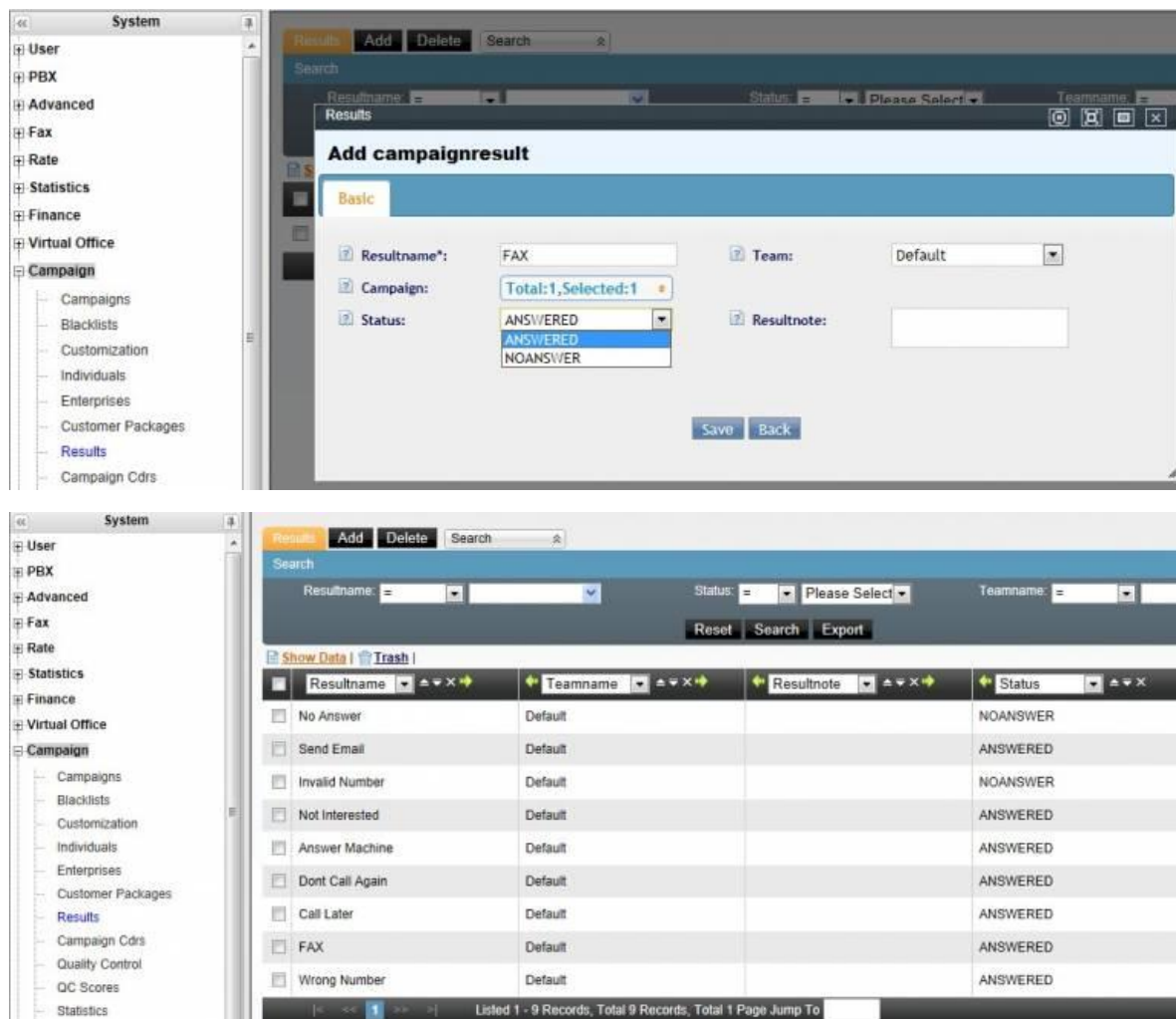
Resultname*: Wrong Number Team: Default

Campaign: Total: 1, Selected: 1

Status: ☒ Select All ☐ Deselect All ☐ Resultnote:

☒ Sales

Back



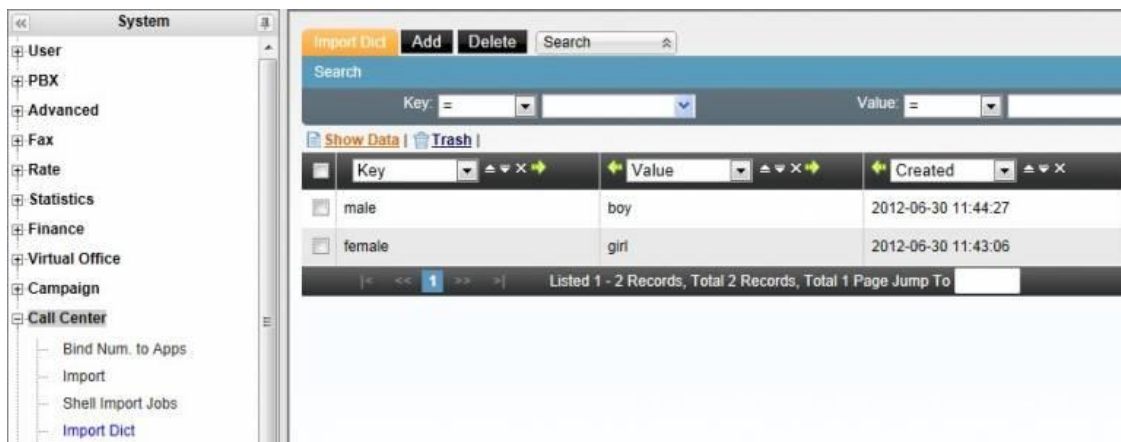
The screenshot displays the EQUINET system interface. On the left is a sidebar menu with categories like User, PBX, Advanced, Fax, Rate, Statistics, Finance, Virtual Office, and Campaign. The 'Campaign' category is expanded, showing sub-items like Campaigns, Blacklists, Customization, Individuals, Enterprises, Customer Packages, Results, and Campaign Cdrs. The main area shows the 'Add campaignresult' form. The form has a 'Basic' tab and fields for Resultname* (FAX), Team (Default), Campaign (Total:1, Selected:1), Status (ANSWERED), and Resultnote. There are 'Save' and 'Back' buttons. Below the form is a table with columns: Resultname, Teamname, Resultnote, and Status. The table contains 9 records. At the bottom, it says 'Listed 1 - 9 Records, Total 9 Records, Total 1 Page Jump To'.

Resultname	Teamname	Resultnote	Status
No Answer	Default		NOANSWER
Send Email	Default		ANSWERED
Invalid Number	Default		NOANSWER
Not Interested	Default		ANSWERED
Answer Machine	Default		ANSWERED
Dont Call Again	Default		ANSWERED
Call Later	Default		ANSWERED
FAX	Default		ANSWERED
Wrong Number	Default		ANSWERED

9)Config Dict

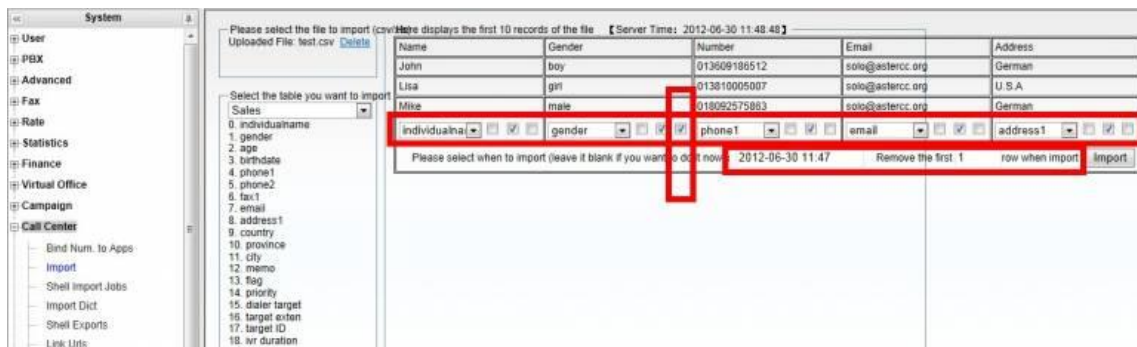
In order to unify the data format, the system supports "dictionary", here we config a dictionary for gender

- go to Call Center → Import Dict, [Add], we already know that for individual records, we use male and female for gender
- add record male ← boy
- add female ← girl

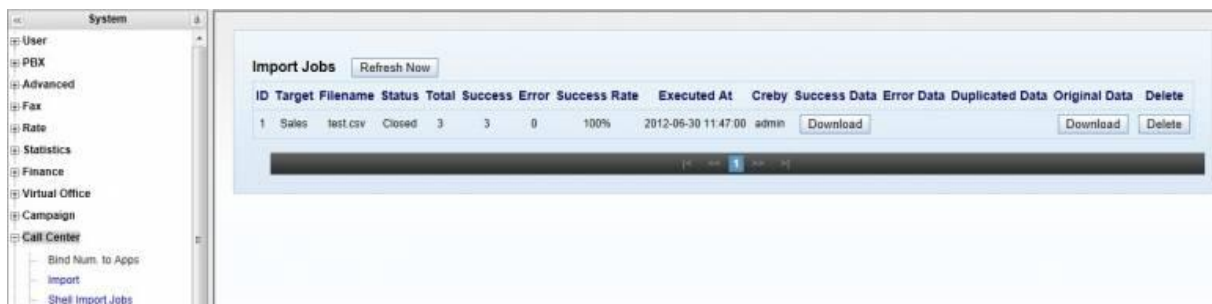


10) Import

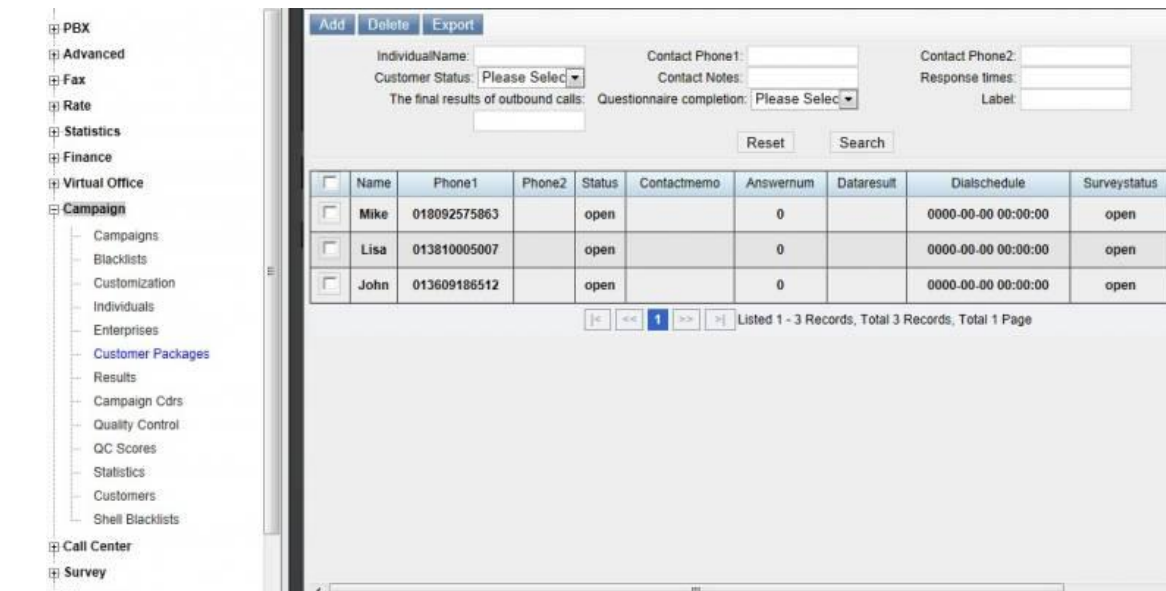
- go to Call Center → Import
- upload the file you want to import (csv or excel)
- choose the package "Sales" on left drop down menu
- select the field we want to import under the column
- check the first checkbox for view only, the second checkbox for edit
- for gender, check the checkbox "dict"
- put remove the first 1 row for removing the title
- ignore the warning



- go to Call Center → Shell Import Jobs
- the import job should be finished in 2 minutes



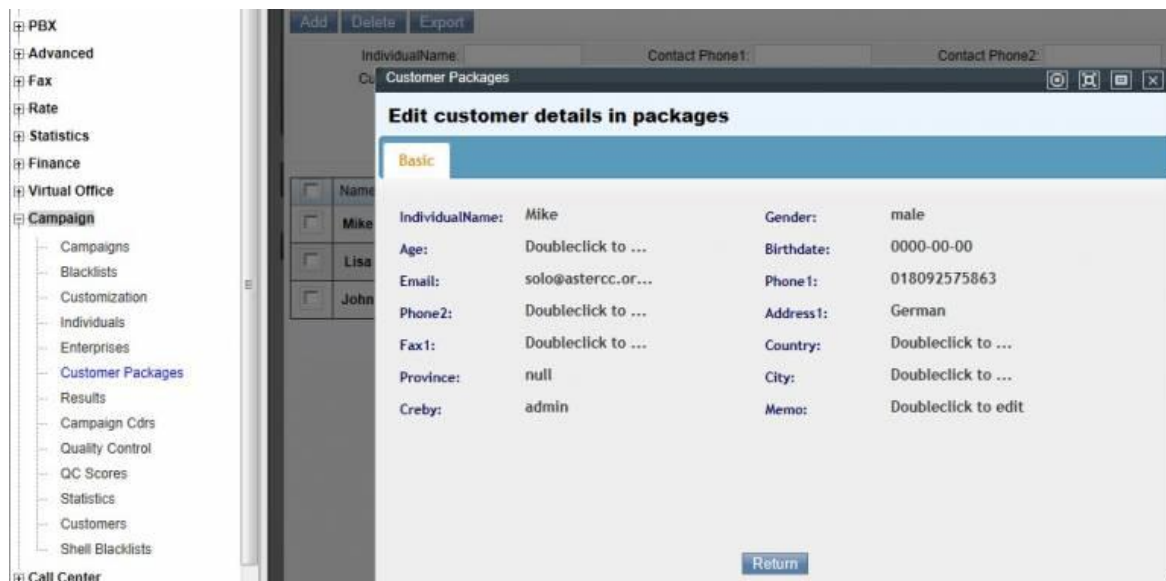
- go to Campaign → Customer Packages, double click "Sales" , click [Edit Customer In Customerpage] to check the records in the package
- click [Add] to add customers from main customer database
- double click a record to open the edit window



The screenshot shows the VINA-PBX interface. On the left is a navigation menu with the following items: PBX, Advanced, Fax, Rate, Statistics, Finance, Virtual Office, Campaign, Campaigns, Blacklists, Customization, Individuals, Enterprises, Customer Packages (highlighted), Results, Campaign Cdrs, Quality Control, QC Scores, Statistics, Customers, Shell Blacklists, Call Center, and Survey. The main area displays the 'Customer Packages' section. At the top, there are input fields for 'IndividualName', 'Contact Phone1', 'Contact Phone2', 'Customer Status' (a dropdown menu), 'Contact Notes', 'Response times', and 'Label'. Below these are 'Reset' and 'Search' buttons. A table lists customer records:

	Name	Phone1	Phone2	Status	Contactmemo	Answernum	Dataresult	Dialschedule	Surveystatus
<input type="checkbox"/>	Mike	018092575863		open		0		0000-00-00 00:00:00	open
<input type="checkbox"/>	Lisa	013810005007		open		0		0000-00-00 00:00:00	open
<input type="checkbox"/>	John	013609186512		open		0		0000-00-00 00:00:00	open

Below the table, it says 'Listed 1 - 3 Records, Total 3 Records, Total 1 Page'. There are also 'Add', 'Delete', and 'Export' buttons at the top left of the main area.



The screenshot shows the 'Edit customer details in packages' window. The window has a title bar with 'Customer Packages' and standard window controls. Below the title bar is a tab labeled 'Basic'. The form contains the following fields:

IndividualName:	Mike	Gender:	male
Age:	Doubleclick to ...	Birthdate:	0000-00-00
Email:	solo@astercc.or...	Phone1:	018092575863
Phone2:	Doubleclick to ...	Address1:	German
Fax1:	Doubleclick to ...	Country:	Doubleclick to ...
Province:	null	City:	Doubleclick to ...
Creby:	admin	Memo:	Doubleclick to edit

At the bottom right of the window is a 'Return' button. On the left side of the window, there is a list of customer names with checkboxes: Mike, Lisa, and John.

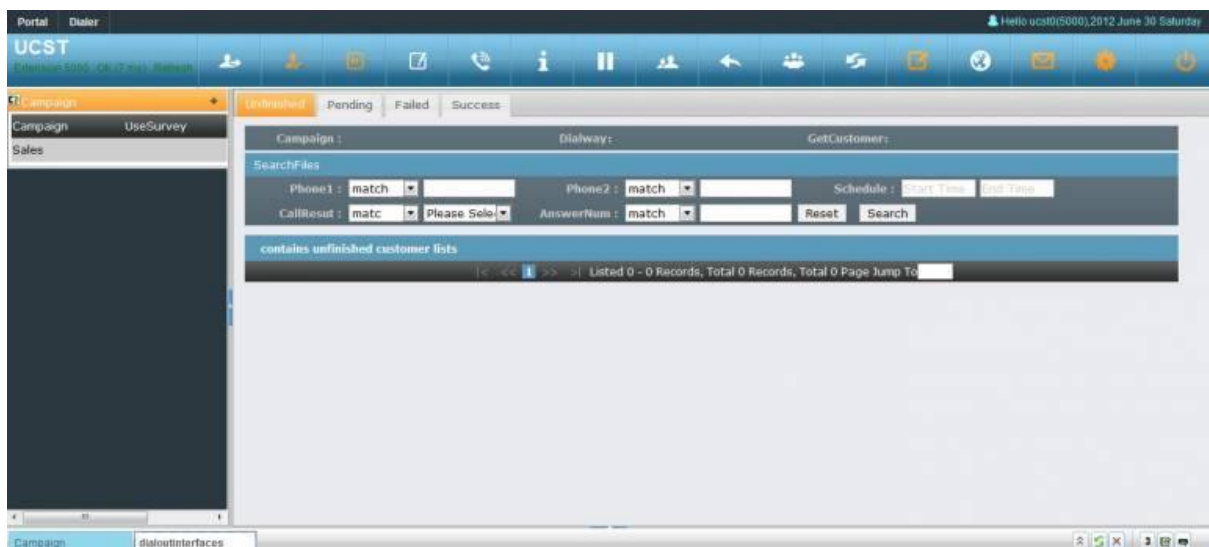
11)Agent Portal

login from an agent account

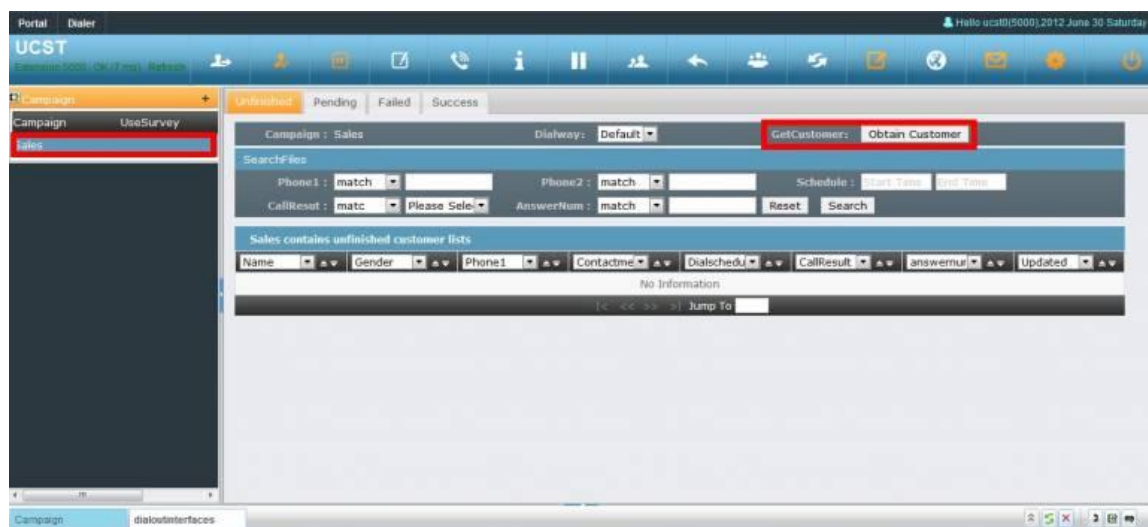
- the agent portal is



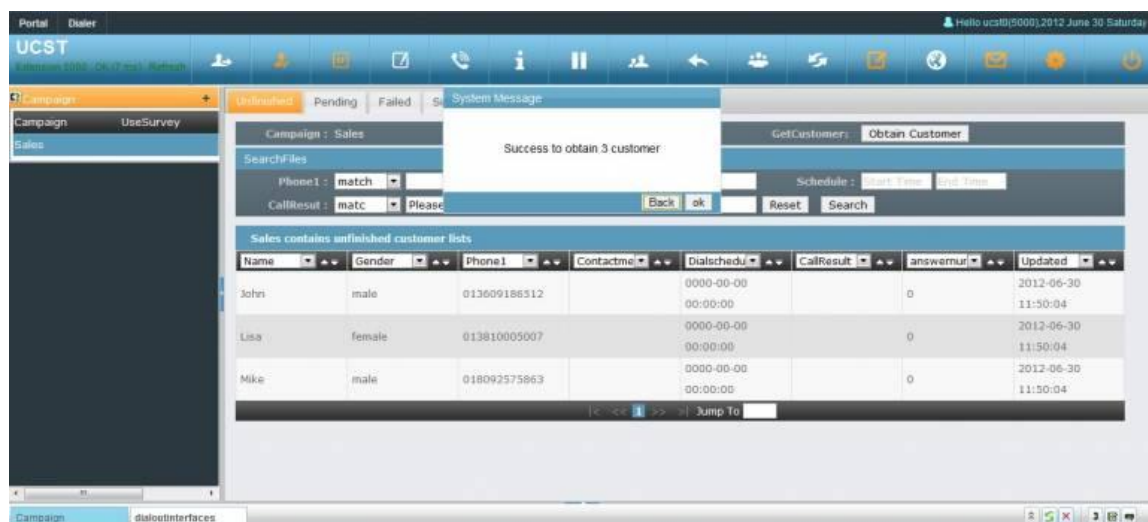
- click tab "dialoutinterface", open campaign module



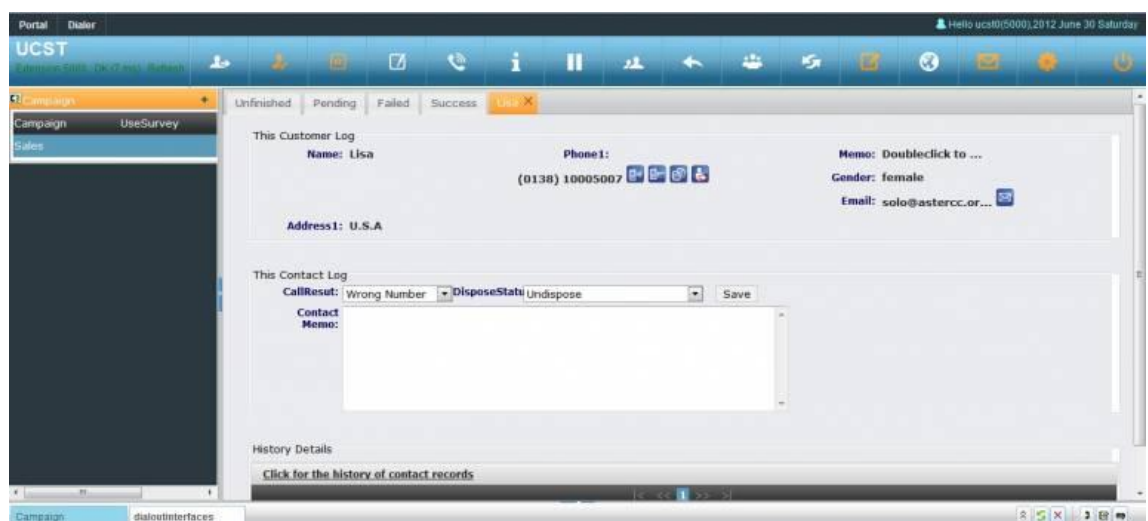
- click campaign "Sales" on left panel
- for the agent, we dont assign any customers yet, but we enabled [Agent Obtain], click the button to get some customers



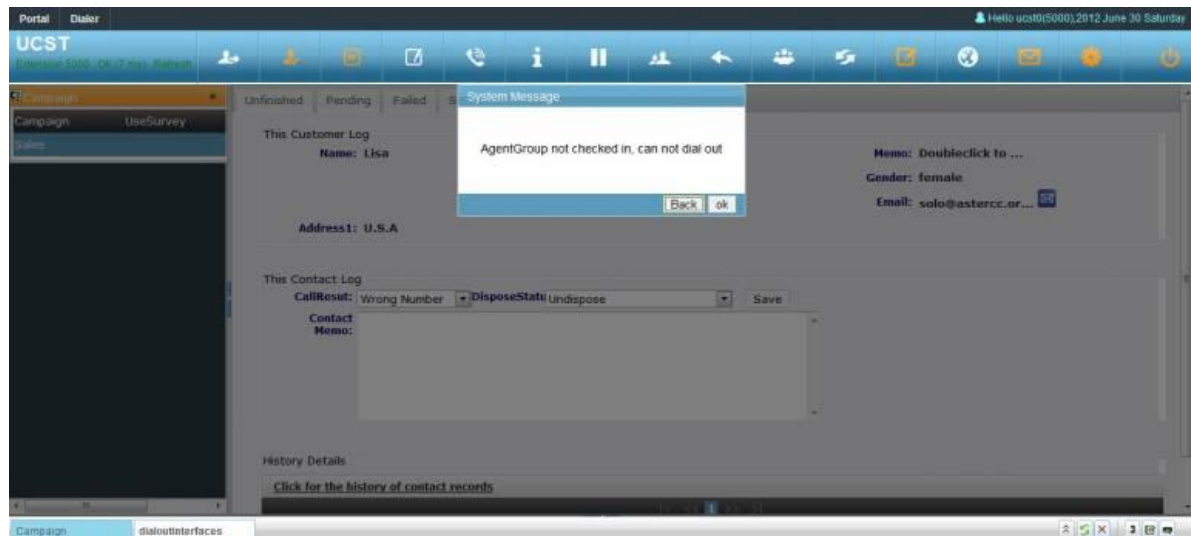
- we only imported 2 records, so this time, agent only get two



- double click to open the customer



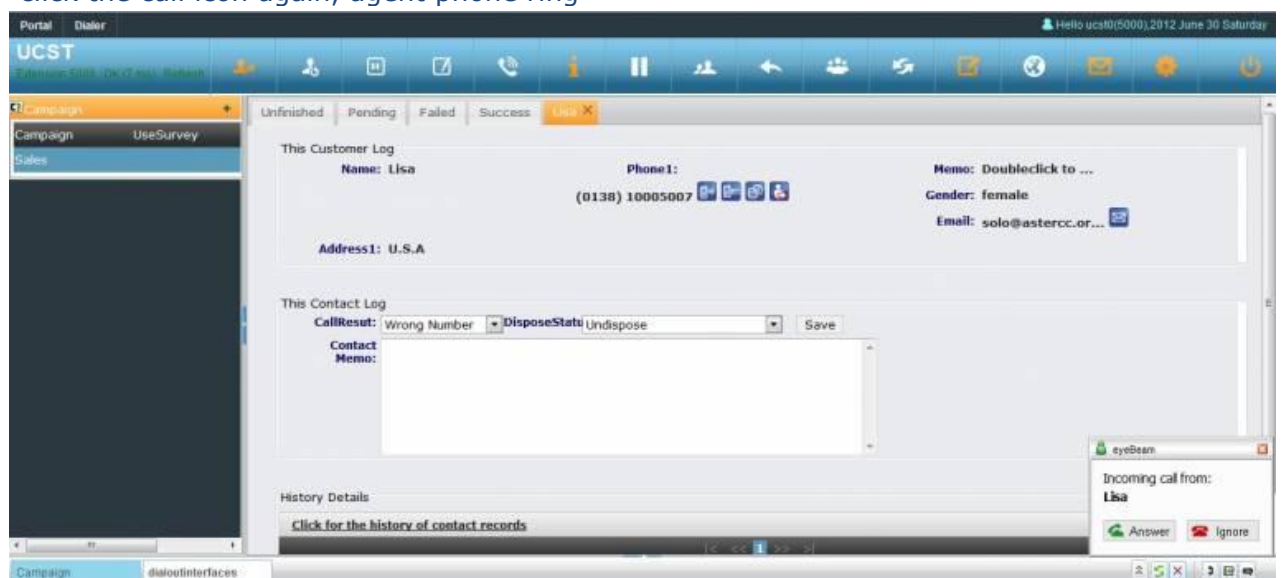
- click the icon after the phone number, system prompt that agent need check in first



- click the agent group icon (first one on tools bar), check-in the agent group

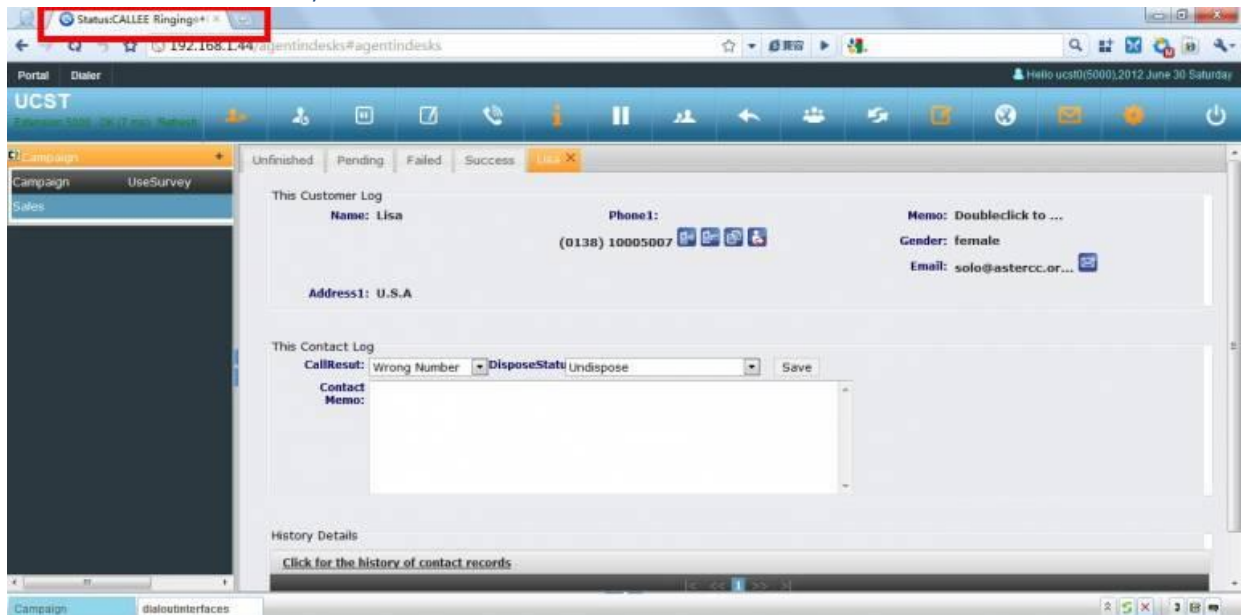


- click the call icon again, agent phone ring

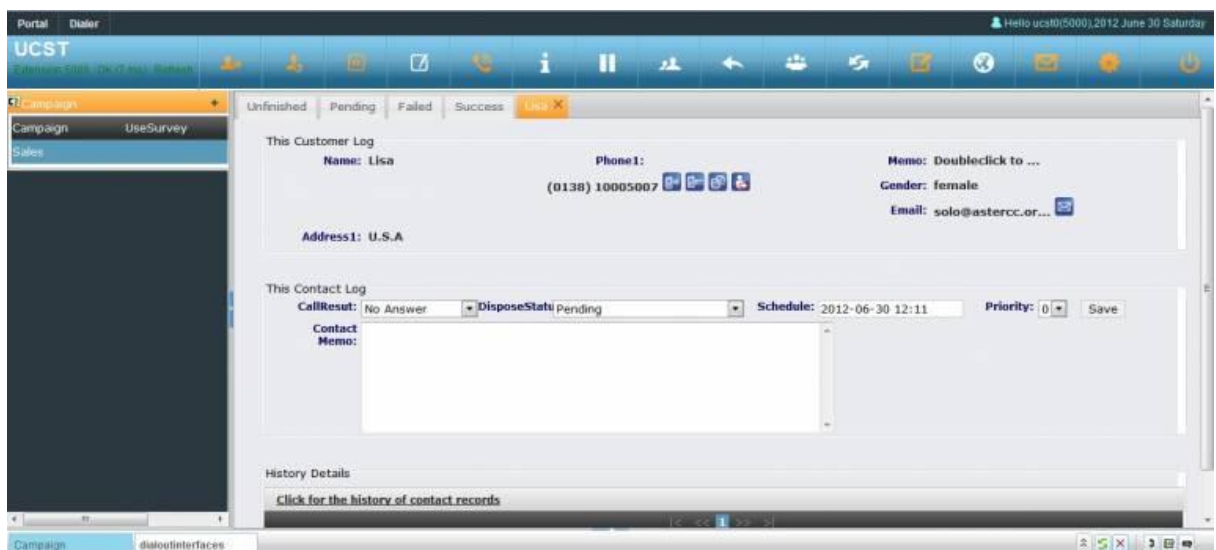


- after agent answered, system will call customer number

- from the browser title, we can see current status



- when select "pending", system will ask for a scheduler and a priority



- click the tab, you can see the customers under different tab

Portal Dialer UCST
 Unfinished Pending Failed Success
 Campaign: Sales Dialway: Default
 SearchFiles
 Phone1: match Phone2: match Schedule: Start Time End Time
 CallResult: match Please Sele AnswerNum: match Reset Search
 Sales contains pending customer lists

Name	Gender	Phone1	Contactme	Dialschedu	CallResult	answemur	Updated
Lisa	female	013810005007		2012-06-30 12:11:00	No Answer	0	2012-06-30 12:15:11

Jump To

Unfinished Pending Failed Success John X

This Customer Log

Name: John Gender: male Age: Doubleclick to ...
 Birthday: 0000-00-00 Phone1: (0136) 09186512 Phone2: Doubleclick to ...
 Fax1: Doubleclick to ... Email: solo@astercc.or... Address1: German
 Province: null City: Doubleclick to ... Country: Doubleclick to ...
 Creby: admin Flag: Doubleclick to edit Memo: Doubleclick to ...
 Created: Updated:

SENDMAIL

This Contact Log

CallResult: Wrong Number DisposeStatu Undispose Save
 Contact Memo:

26.3 How to configure the filter



Since we have already learned how to pre-dial, you may need to know about the filter, which plays an important role in assisting the pre-dial function. When the pre-dialed number needs to be recycled, or be placed into the dialer list again, the filter can recycle all the numbers that meet your settings in a certain period of time. The filter will save the agents a lot of time which they might have used to recycle the numbers one by one. This raises the efficiency significantly.

In the system management interface, Call center outbound management- Campaign customers:

Campaign Customers **asterccdev** **Add** **Delete** **Filter** Search

Search

individualname: **match** phone1: **match** phone2: **match**
 address1: **match** city: **match** memo: **match**
 updated: Start Time End Time created: Start Time End Time
Reset **Search** **Export** xls file

	individualname	phone1	memo	Updated
<input type="checkbox"/>	newcustomer	15171533287		2012-03-22 10:05:01
<input type="checkbox"/>	liuman	13407277334		2012-03-22 10:05:01
<input type="checkbox"/>	xiezhengguo	13607228239		2012-03-22 10:05:01
<input type="checkbox"/>	dengjianfang	13807221581		2012-03-22 10:05:01
<input type="checkbox"/>	lidajiao	13886993768		2012-03-22 10:05:01
<input type="checkbox"/>	liuqing	15271143129		2012-03-22 10:05:01
<input type="checkbox"/>	anlan	15027291367		2012-03-22 10:05:01
<input type="checkbox"/>	chenyan	13593988483		2012-03-22 10:05:01
<input type="checkbox"/>	liuqunping	15827974952		2012-03-22 10:05:01
<input type="checkbox"/>	jiangdaibing	15871506927		2012-03-22 10:05:01

Open "Add filter".

Add Filter

Add Filter

Filter Name*: Property: enable Dialer Phone Field: phone1

Process Scheduling: Minute * Hour * Day * Month * Week *

Has selected filter conditions

Add filter conditions

individualname Match Please Select Add

Back Save Filter

Filter Name	Process Scheduling	Property	Filter Conditions	Process	Delete
< << >> >					

Filter name: name this filter.

Property: enable the filter or not.

Dialer phone field: is the firstly identified number by the system. When there are two or more telephone numbers in the customer information, you can choose which one to be pre-dialed firstly.

Process scheduling: when you would like the filter to start to work. There are five dropdown menu. When all the five are "*", it means this filter is working all the time. And the same telephone numbers will not be imported into the dialer list again if it's already in it. Select the time you want the filter to start at.

For example

If you want the filter to work at the 0th minute every hour every day, set it like this:

Process Scheduling: Minute 0 Hour * Day * Month * Week *

If you want the filter to perform at 9:15 on the first day of each month, set it like this:

Process Scheduling: Minute 15 ▾ Hour 9 ▾ Day 1 ▾ Month * ▾ Week * ▾

If you want the filter to perform at the 15th minute of each hour on every Monday of March, set it like this:

Process Scheduling: Minute 15 ▾ Hour * ▾ Day * ▾ Month 3 ▾ Week 1 ▾



Through those example you can better understand the rule of setting the time. "Day" and "Week" cannot be set at the same time.

Now, set the filter conditions

Add filter conditions

id ▾ Match ▾ ▾ Please Select ▾ Add

fields under the campaign input the information Back Save Filter

Filter Name	Process Scheduling	Property	Filter Conditions	Process	Delete
-------------	--------------------	----------	-------------------	---------	--------

In the "add filter conditions", choose the field name you need to set and the condition which including Match, Less than, Equal, Greater than, Unequal. Enter the condition in the box. The choice box has all the logical relation.

For example, if you want to add all the customers aged above 25 and surnamed Wang, choose "age" "greater than", and enter "25", then choose "or", and choose the "individual name" field name, "Match" as a condition, finally enter "Wang" in the box.

Add filter conditions

individualname ▾ Match ▾ wang ▾ OR ▾

individualname ▾ Match ▾ li ▾ Please Select ▾ Add

Back Save Filter

Click "Add" to set a condition. If you still want to set more conditions, you should allow the system to recycle the data into the dialer list, then you can go on with the setting and adding of the conditions. The added conditions will appear in the chosen pre-dial filter conditions. After saving, you can preview the data in the form at the bottom of the interface.

Add Filter

Filter Name*: Property: Dialer Phone Field:

Process Scheduling: Minute * Hour * Day * Month * Week *

Has selected filter conditions

individualname Match wang OR OR

individualname Match li

Add filter conditions

Match

Filter Name	Process Scheduling	Property	Filter Conditions	Process	Delete
asd	*****	enable	(individualname Match li)	Immediate	Delete

Now we have finished configuring the filter. You can log in the agent interface to see the dialer list.

Portal User PBX Pbxadvanced Fax Rate Statement Statistics Adjustment Statistics CallCenter Business CallCenter Virtualcustomer CallCenter Outbound

Personals AgentCdrs VoiceMails Real times Adjust Payments **Dialer** Work Loads Messages Notices Scheduling

agent total 3 login 0 paused 0 idle 0 ring 0 answer 0

Survey	WorktimePackage	Waiting For Dial	Max Channel	Agent Percentage	Advanced Settings	Action	view diallist	Data Recover
astercc 工作时间	18	0	0	100 %		Start	view diallist	Recover
agent total 3	login 0	paused 0	idle 0	ring 0	answer 0			
Survey	WorktimePackage	Waiting For Dial	Max Channel	Agent Percentage	Advanced Settings	Action	view diallist	Data Recover
500888		0	0	0 %		Start	view diallist	Recover
外拨企业拨号计划		0	0	0 %		Start	view diallist	Recover
4万多数据		0	0	0 %		Start	view diallist	Recover
stepOfCampaign		0	0	0 %		Start	view diallist	Recover
测试562		0	0	0 %		Start	view diallist	Recover
时字宝测试建立企业客户		2	0	0 %		Start	view diallist	Recover
asterccdex	campaign	3509	0	0 %		Start	view diallist	Recover

Open any recycle list

We can put the number matching the filter conditions into the dialer list. If the recycled customer called “大连 (Dalian)”, the filter with the field name containing “大连(Dalian)” will perform immediately. Then we go back to check the dialer list:

Show Dial List

Delete Checked Delete All

Search

Customername: LIKE li Phonenum: LIKE dialerstatus: = Please Select

Duration: LIKE agent billsec: LIKE callee billsec: LIKE

Priority: LIKE Start Time: Start Time End Time Dial Time: Start Time End Time

callee answer: Start Time End Time agent answer: Start Time End Time

Reset Search

<input type="checkbox"/> All	Customername	Phonenum	dialerstatus	Priority	Start Time	Dial Time	Duration	agent billsec	callee billsec	agent e
<input type="checkbox"/>	lijianmeng	15871539219	open	0	0000-00-00 00:00:00	0000-00-00 00:00:00	0	0	0	0000-0
<input type="checkbox"/>	liguizhi	15971176617	open	0	0000-00-00 00:00:00	0000-00-00 00:00:00	0	0	0	0000-0
<input type="checkbox"/>	zhangli	15871511092	open	0	0000-00-00 00:00:00	0000-00-00 00:00:00	0	0	0	0000-0
<input type="checkbox"/>	liuqunping	15827974952	open	0	0000-00-00 00:00:00	0000-00-00 00:00:00	0	0	0	0000-0
<input type="checkbox"/>	liuqing	15271143129	open	0	0000-00-00 00:00:00	0000-00-00 00:00:00	0	0	0	0000-0
<input type="checkbox"/>	lidajiao	13886993768	open	0	0000-00-00 00:00:00	0000-00-00 00:00:00	0	0	0	0000-0
<input type="checkbox"/>	liuman	13407277334	open	0	0000-00-00 00:00:00	0000-00-00 00:00:00	0	0	0	0000-0

The customer numbers which match the conditions now appear in the dialer list, and the system will dial in sequence.



If the number exists in the dialer list, it won't be recycled into the dialer list again by the filter.

26.4 How to config customer server module for inbound calls

A company can store all their customer information in main table individual and organization, when customer dial in, agent could get a popup with customer profile, call history, ticket history event purchase history, so they can provide better service.

Add a trunk

please see [Trunk](#)

Create Agent Group

To make clear the division of agents' work, an agent group is assigned to serve the inbound customer services. Start a new agent group, add the agents responsible for inbound customer services into this group. See [Agent Group](#)

Add Queue

After saving the new agent group, select create queue automatically instead of start a new queue for this group by your own. If the queue has not been created, add one, and select this queue in the group that has been created previously.

See [Queue](#)

Add DID

If the company possesses multiple businesses, use DID to serve them each.

See [DID](#)

Add Inbound Customer Service

To add an inbound customer service for a particular business, assign an agent group to work for the inbound customer service applications.

See [Customer Service](#)

Add Binding Inbound Applications

If you do not need DID, you need to bind the inbound customer service with the trunk. If you choose to use DID, bind the inbound customer service with DID.

1.Agent Interface

When calls come in the system, the specified page will pop up, like the Dial in interface by default.

1.1New customer

If the call is from a new customer, an interface to be added by the agent will pop up.

5000 x

Option Caller

Contact Number: 5000(DialIn) The Number Attribution: Unknown Incoming Time: 2013-05-17 16:51:21

This Customer Log Switch to the organization customer

Customer information is not found, please add or search for other customers Search by phone Search

Division of regional customers: center -Please Select-

Name*: Phone1*: 5000 Phone2: 5000

Email: Fax1: Address1:

Tag: Enterprise: Click Select Organization Province*: Please Select

City: Please Select OutboundIndividu Please Select OutboundIndividu Please Select

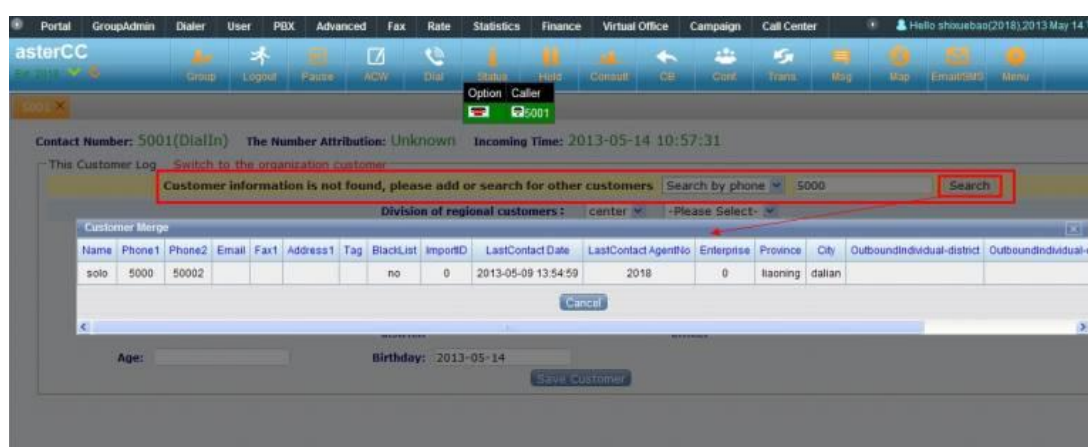
Age: Birthday: 2013-05-17 office:

Save Customer

- ① the number that is calling in
- ② the number's area, which needs to be added in [Area Code](#), or import the number attribution field through [Import](#).

- ③ the call in time
- ④ change the type of customers to be saved. Here, we can configure through the field "New customer priority" in the inbound customer service. Please refer to the explanation of new customer priority in [Customer Service](#)
- ⑤ You can search whether the numbers that call in have already been in the system by the numbers.
- ⑥ To assign customers into different areas, we need the customer service to open the field

Click the search in ⑤, and if the number belongs to a certain customer, an interface will pop up:



Choose a customer, click the bind button behind, and a tip will pop up:



In the table above, you can update the binding customer field with the new incoming call number through the button in red.

- Do not update: means not to bind the number to the customer.
- Phone number1 and Phone number2: save the number as phone number1 or 2 to the customer. When next time this number calls in, the binding information will pop up.

In the new customer pop up, we can change the type of customers to be saved in ④

The customer will be save as individual customer, and you can change it into company customer turning to the company customers add page.

1.2 Pre-existing Customers

If the number calling in already belongs to a customer in the system, a page with customer information will pop up.

- ① is the number calling in
- ② the number's attribution, which needs to be added in Area Code, or import the number attribution filr through Import.
- ③ the time that the number calling in
- ⑤ You can search whether the numbers that call in have already been in the system by the numbers.
- ⑥ To assign customers into different areas, we need the customer service to open the field `

Click the search in ⑤, and if the number belongs to a certain customer, an interface will pop up:

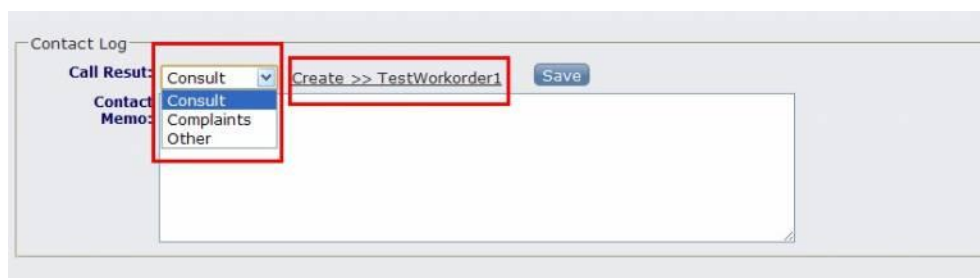
Choose a customer, click the bind button ahead, and a tip will pop up:



Click Ok and bind the customer with the customer that is calling in

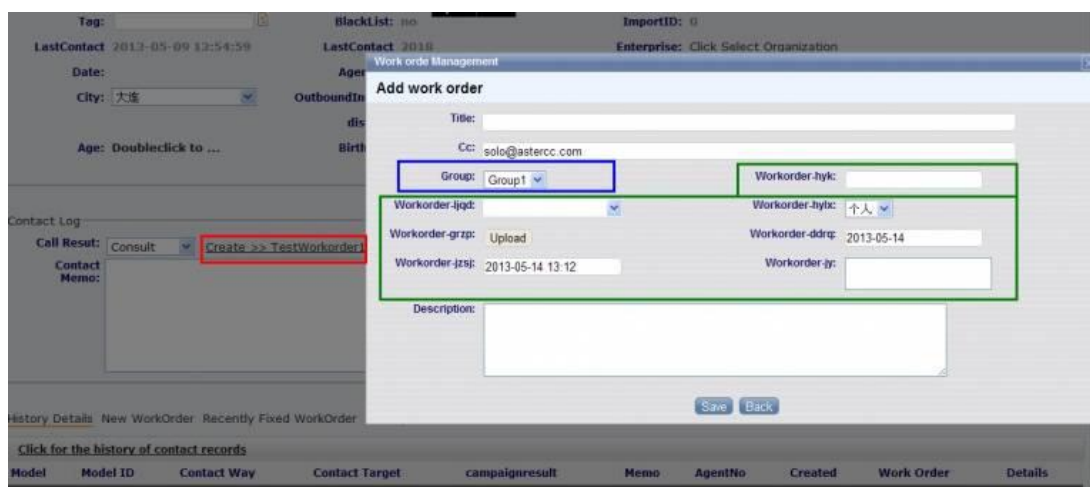
1.3 Contact Log

In the customer information popup, add this contact log this time to the contact log of that customer:



What dose the call is for in the red. Add the call purpose(result) at Call Result. If you chose to bind the purpose with work order, there will be a corresponding work order in the drop-box of call result, you can click and add work order.

Click Add work order:

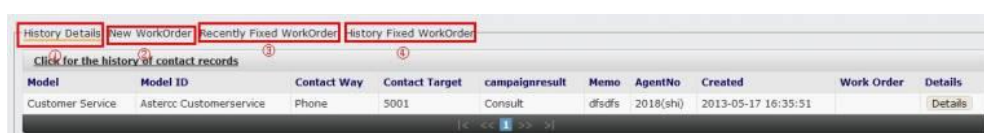


Fields in green are user-defined for the work order.

Agent group in blue means the work order has not been set for auto-transfer. The new added work order needs to pick a transfer group in the transfer range.

2. History Details, New Work Order, Recently Fixed Work Order, History Fixed Work Order

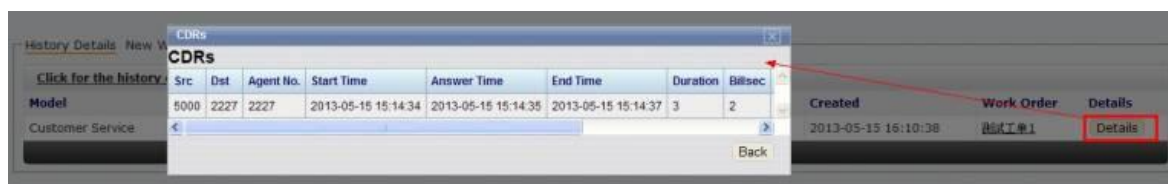
Through this you can see **History Details, New Work Order, Recently Fixed Work Order, History Fixed Work Order** of the customer in the popup



page.

2.1 History Details

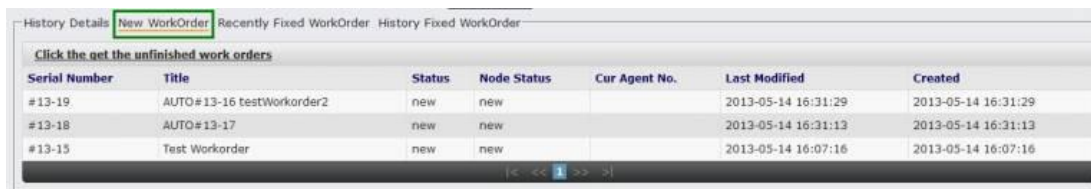
The History Details chosen by default in the popup page. When you set the "Default Read History" as yes, the contact details will be saved automatically when calls coming in and pages popup.



Like the picture above, click "Details" behind each record for more information.

2.2 New Work Order

Click New Work Order to see the unfinished work order under that customer.



2.3 Recently Fixed Work Order

Click Recently Fixed Work Order and it will list the work orders your finished recently

History Details New WorkOrder Recently Fixed WorkOrder History Fixed WorkOrder					
Click the get recently completed work orders					
Serial Number	Title	Status	Cur Agent No.	Last Modified	Created
#13-16	testWorkorder2	fixed		2013-05-14 16:31:29	2013-05-14 16:29:26
[< << 1 >> >]					

2.4History Fixed Work Order

Click Recently Fixed Work Order and see the finished work orders formerly.

History Details New WorkOrder Recently Fixed WorkOrder History Fixed WorkOrder					
Click the get history completed work orders					
Serial Number	Title	Status	Cur Agent No.	Last Modified	Created
#13-17	testWorkorder3	fixed		2013-05-14 16:31:13	2013-05-14 16:29:45
[< << 1 >> >]					

E Commerce

Install the E-commerce module into the system, and bind the module with the inbound customer service, then you can see the E-commerce module in the popup customer interface:

E-Commerce - testCommerce										
Product Name:		Type: -Please Select-	Barcode:		Search		Reset			
Product Name	Type	Category	Barcode	Specifications	Units	Quantity	Public Price	Member Price	Description	Operation
牛奶	Solid	奶制品	FASDEQWFFFGS9874	12瓶/1箱 每瓶400ml	1箱	1	42.00	40.00	牛奶饮品	
beer	Solid	drink	7BSFASD5F6A4755	12*500ml*1box	box	1	72.00	70.00	Drink	
[< << 1 >> >]										
Product Name	Barcode	Specifications	Unit-Price	Quantity	Original Price	Discount Amount	Amount Receivable	Cancel		
beer	7BSFASD5F6A4755	12*500ml*1box	<input checked="" type="radio"/> Public Price 72.00 <input type="radio"/> Member Price 70.00	1	72.00	0	72.00	<input type="button" value="Cancel"/>		
							Total receivables	72.00		
Sms	no		Invoice	no		InvoiceRequire				
Consignee	时李宝		ConsigneeMobile	5001		ConsigneePhone		5001		
ConsigneeZipcode			ConsigneeAddress							
Memo										
<input type="button" value="Save the order"/>										
Click the get recently purchase records										
[< << 1 >> >]										

In ①, search products via product name, type and barcode. The result will be shown in the list in ②.

③ shows the product list on sale. You can move the products from ② to ③ and put them on sale by clicking the button behind them.

You can modify the price, quantity, discount amount, and amount receivable. You can remove the products by clicking the cancel button behind them.

In ④, when you finish the product information, you need to save the order for the customer. The default consignee, telephone number and phone number are all from the customer

popup page. Finish all the information, click save the order and system will give a tip for a successful order.

- ⑤ shows the recent purchase history of that customer, and it won't be displayed automatically, you need to click to get recent purchase records to obtain the information. It will be shown in the

Click the get recently purchase records

ID	OrderCode	Model	Model ID	Product Name	Quantity	Unit-Price	Original Price	Discount Amount	Amount Receivable	AgentNo	Created
3	00000000003	Customerservice		beer	1	72.00	72.00	0.00	72.00	2018	2013-05-15 10:56:57
4	00000000003	Customerservice		牛奶	1	42.00	42.00	0.00	42.00	2018	2013-05-15 10:56:57
2	00000000002	Customerservice		牛奶	1	42.00	42.00	0.00	42.00	2018	2013-05-15 10:45:49

list. |< << >> >|

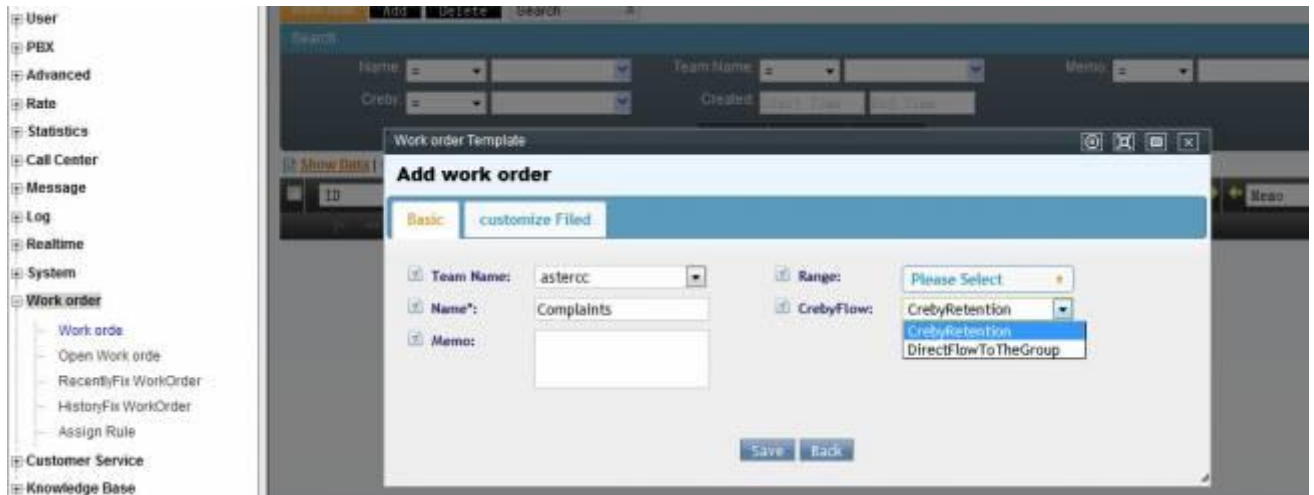
The picture above shows the recent purchase record of that customer:

- Order Code
- Module: by which module in the system the work order has been generated
- Module ID: the specific name of the module that generated the work order
- Product name: name of the product purchased
- Quantity: the quantity of the product purchased
- Unit Price
- Original Price
- Discount Amount: the discount amount of this product for this specific customer
- Amount Receivable: the final price of each product
- Agent No: the number of the agent that made the order
- Created: the time that the order was created.

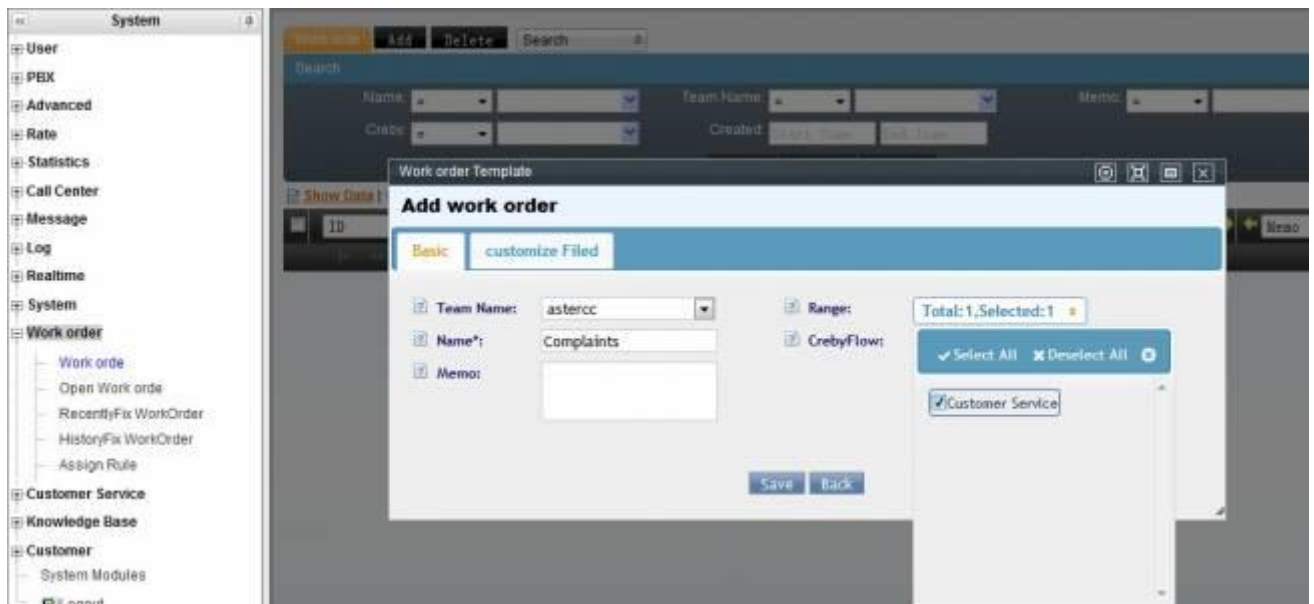
26.5 how to use work order in customer service module

Create a kind of work order

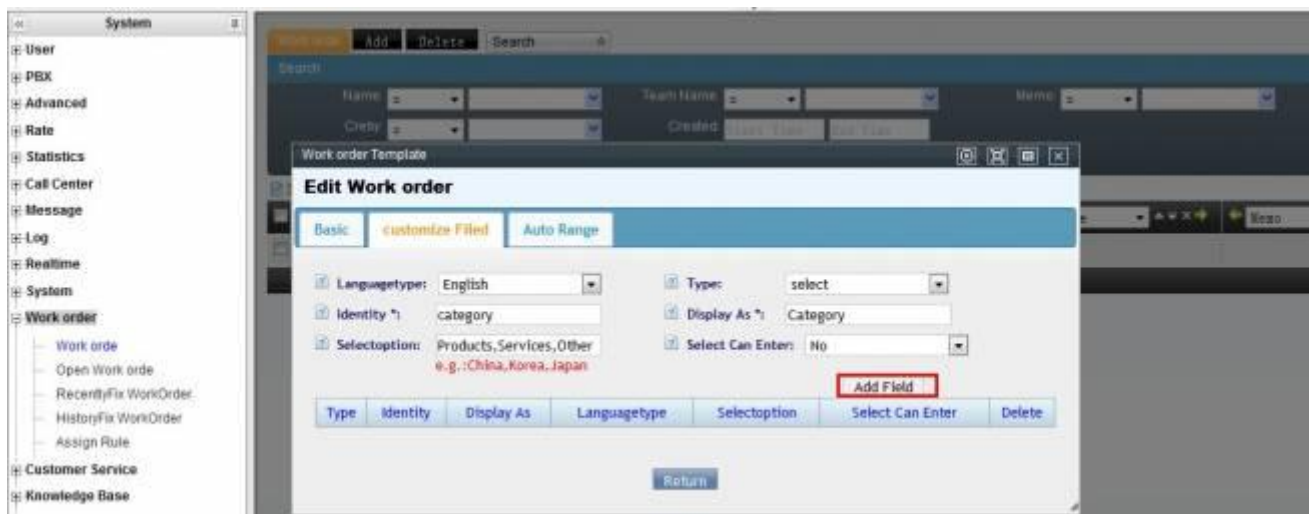
- go to [Work order] → [Work order], click [Add], we can add many kinds of work order as required
- We can config where the new work order should go, including CrebyRetention and DirectFlow to group
 - CrebyRetention: the work order will be assigned to the agent who create it.
 - DirectFlow to group: the work order will stay in unassigned status, until the agent group assign it to some agent



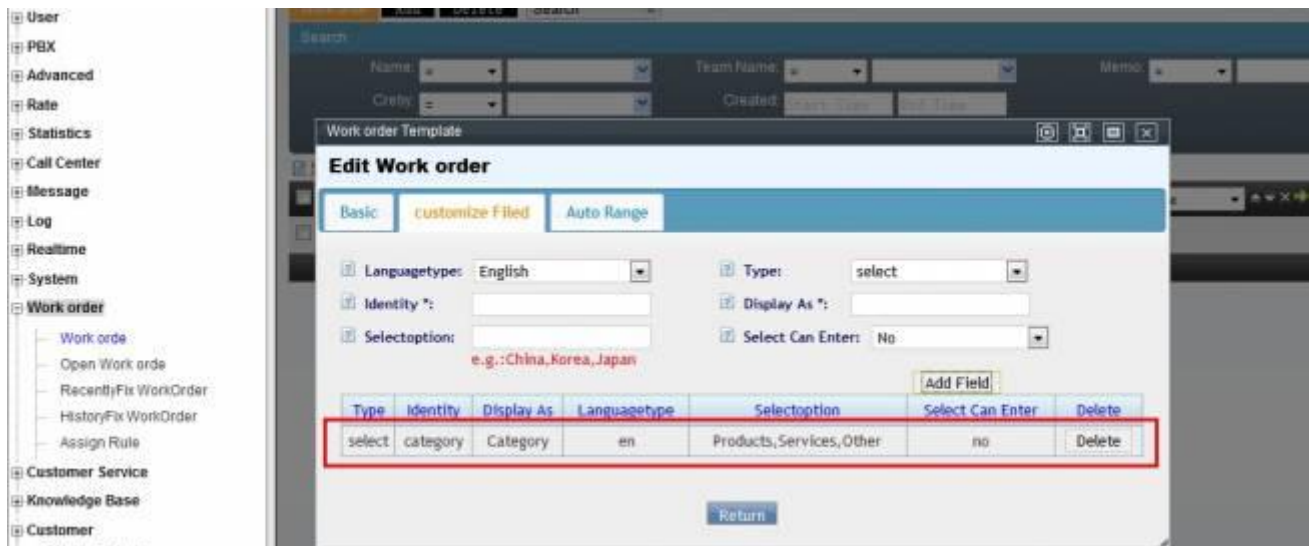
- We need select the range to determine which groups the work order could go



- Go to "customize Filed", we could add any fields we need in this work order

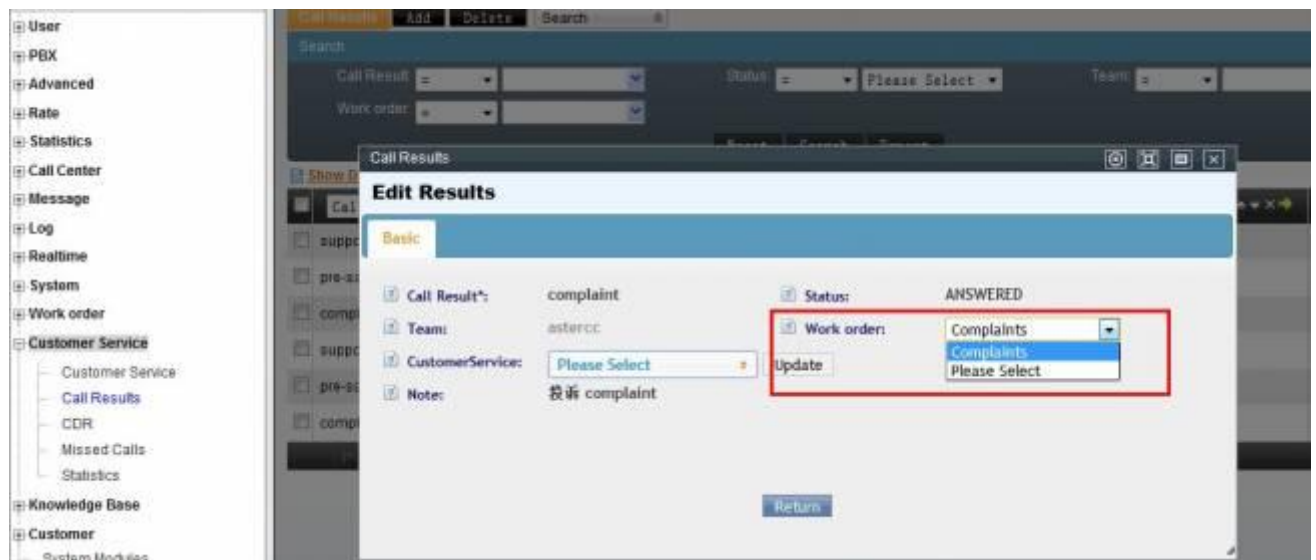


- Click [Add Field], we can read the customized fields list



Binding Work Order

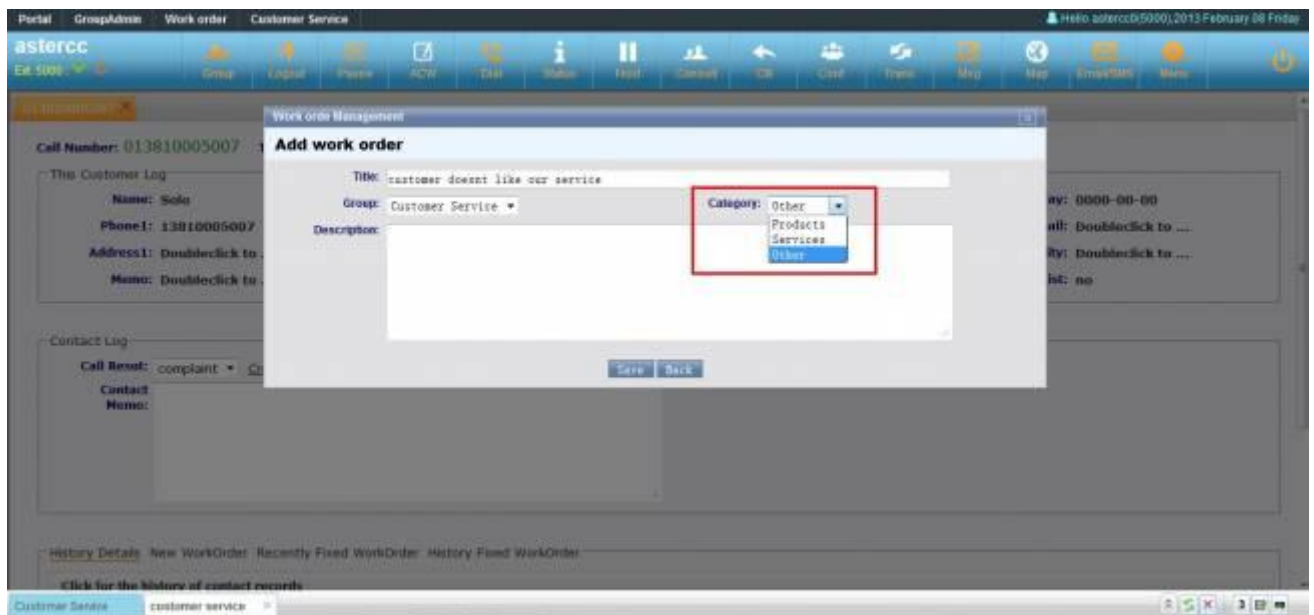
- We could bind customer service call result with a work order, when select this call result, we could get the link to create the work order



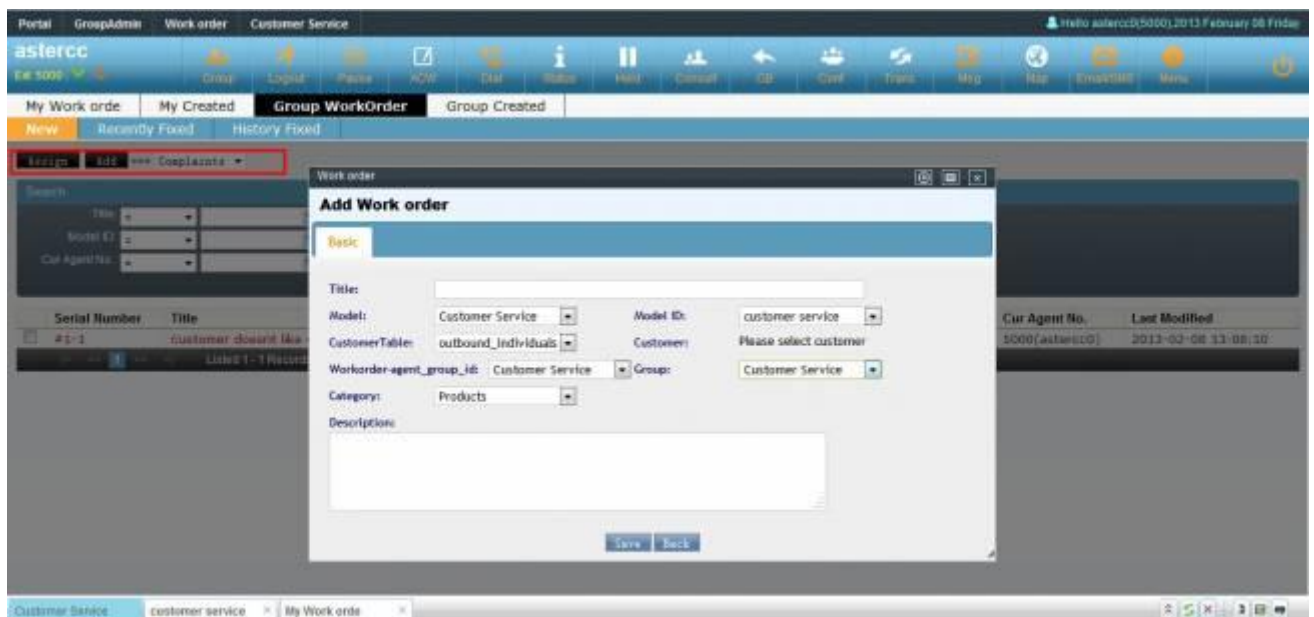
Create a work order

- Agent could create work order from customer service popup page
- select the call result, it will display the link to create the work order



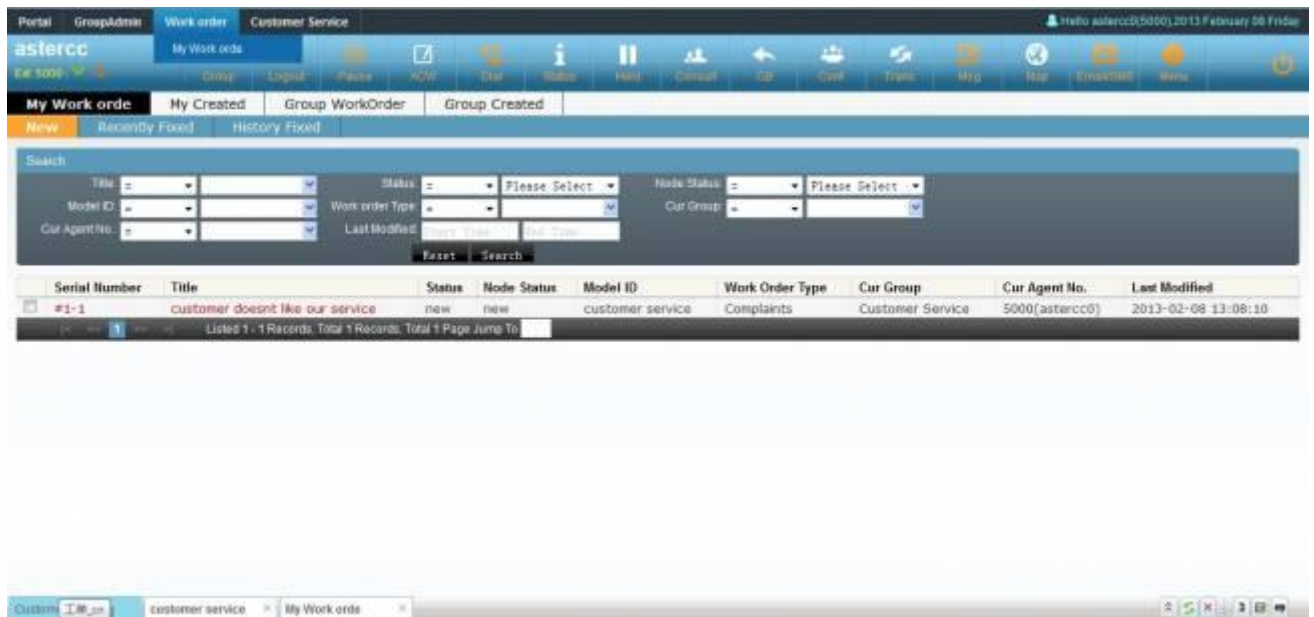


- As agent group, he can create a work order and assign them to agents

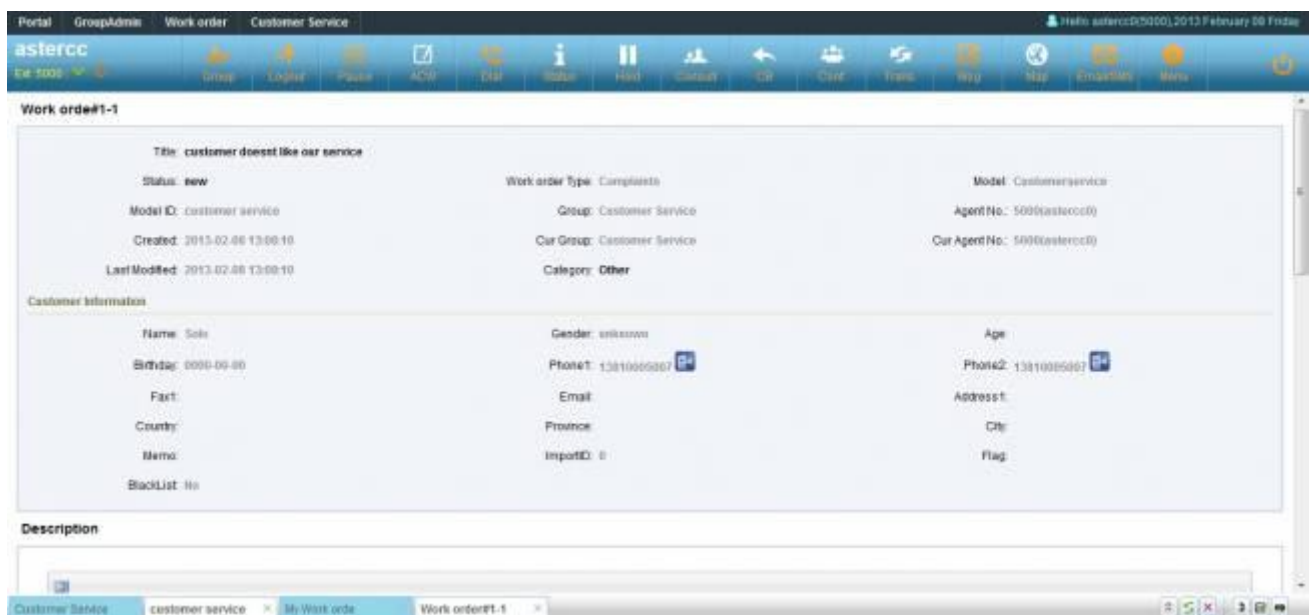


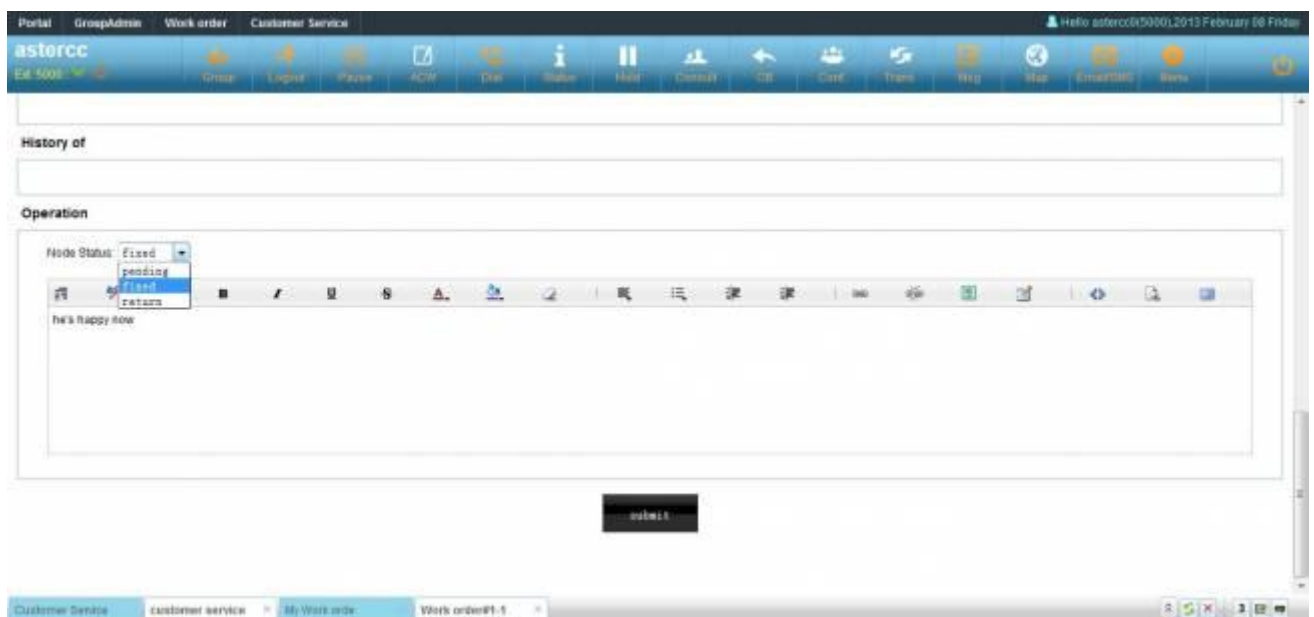
Work Order Flow

- Agent could see his unfinished work order list in [My Work Order] → [New]

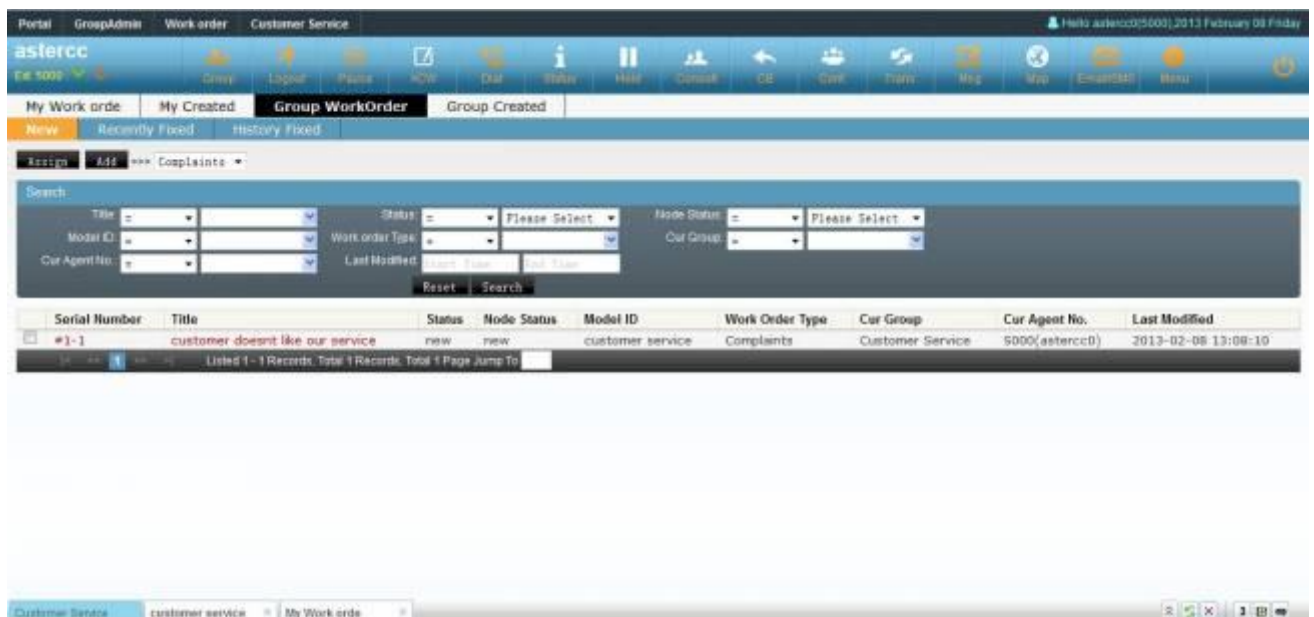


- Double click the work order it will display the detail

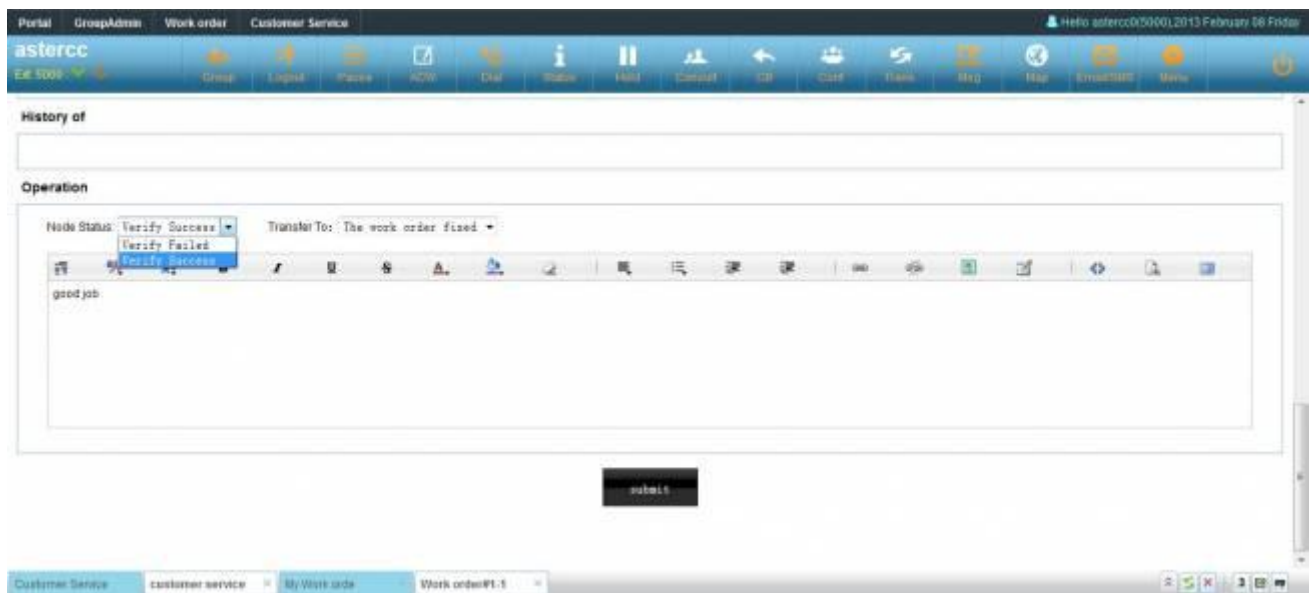




- When the work order is fixed, agent could update status of the work order
- When agent job is done, the work order will wait to get verify, group admin could read these work order under new tab

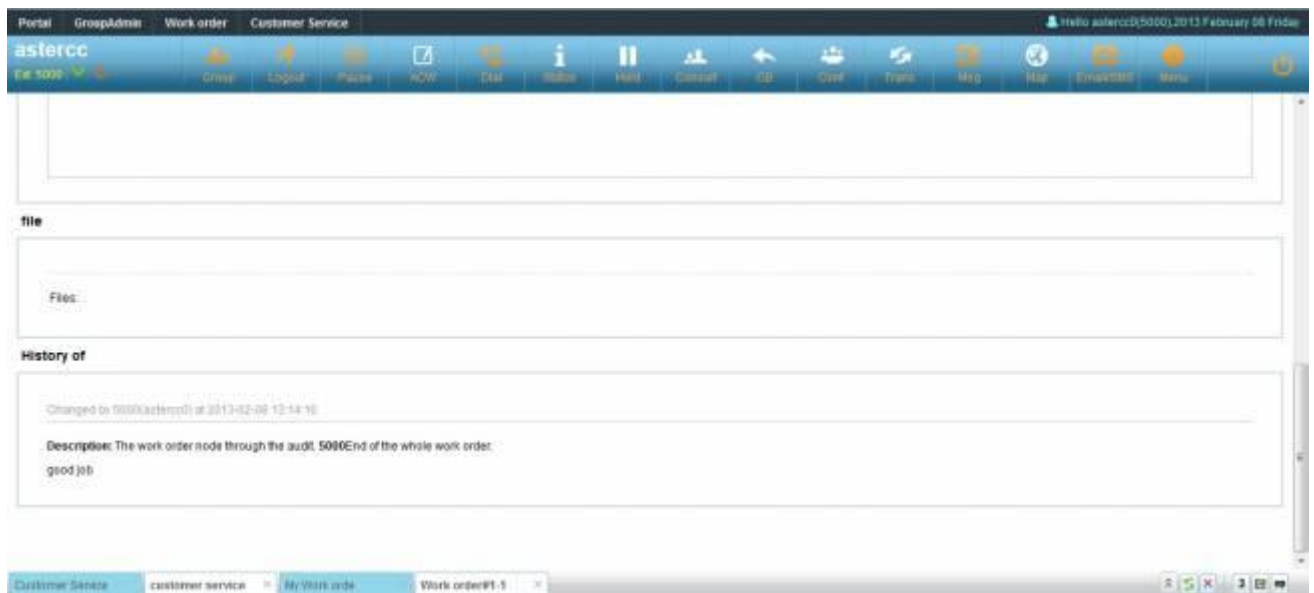


- Group admin could set if a work order is done, he can choose "Verify Failed", return the work order to agent, or "Verify Success", close the work order or send it to another group

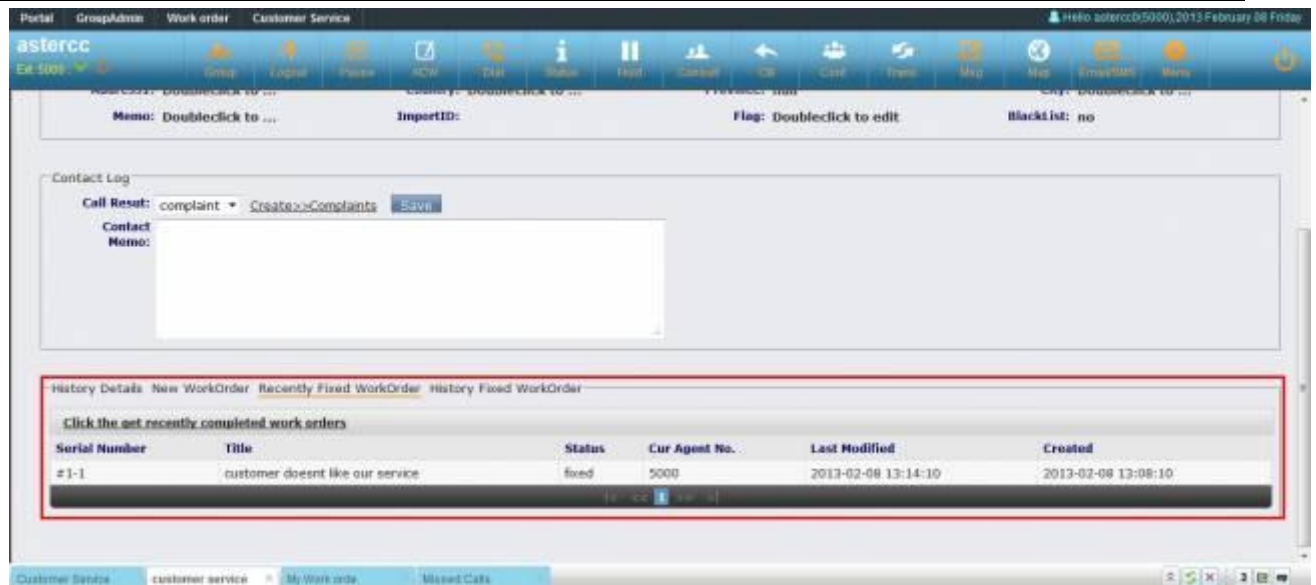


- Group admin could see all work orders, and all operation of the work order will be saved



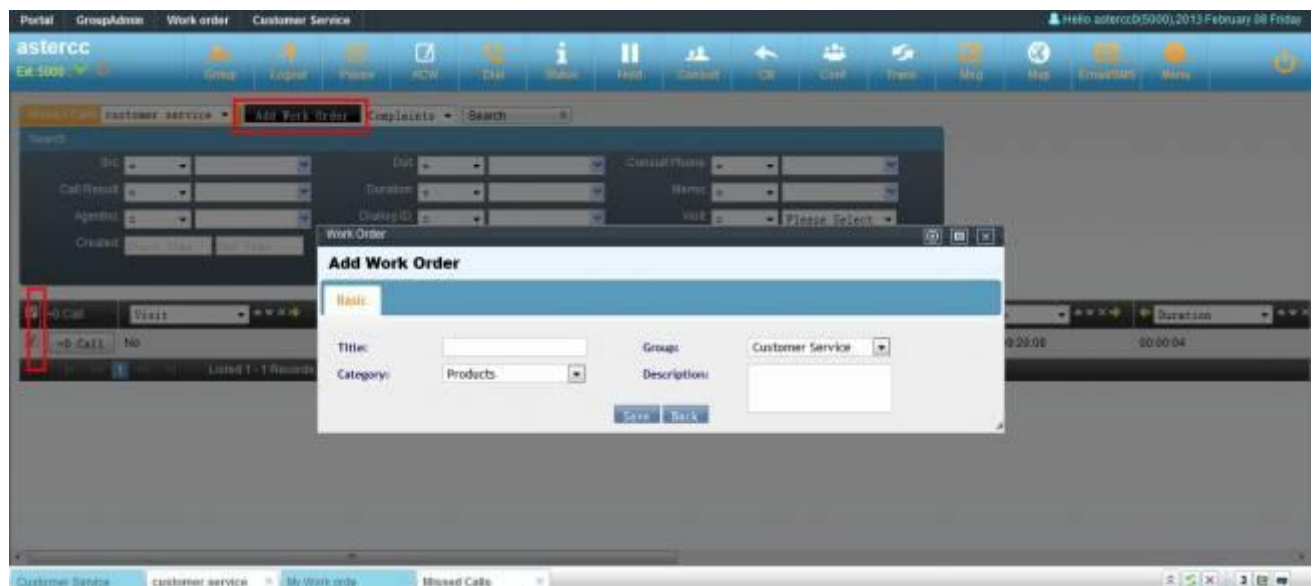


- Agent could see work order history of a customer in customer service popup page



Missed Calls

- Go to [Customer Service] → [Missed Calls], group admin could add work order for missed calls



26.6 How To Use E-Commerce In Customer Service Module

Create E-Commerce

- go to [E-Commerce] → [E-Commerce], click [Add].We can create different type of E-Commerce by need;

E-Commerce

Add Ecommerce

Basic

E-Commerce Name*: testCommerce

Team*: astercc

Status: Enable

Memo: TEST E-Commerce

Save Back

Create Products For E-Commerce

- go to [E-Commerce] → [Products], choose the select on the top of page, choose one E-Commerce, then click [Add], add product for this E-Commerce

Products

Add Product

Basic

Product Name: beer

Type: Solid

Barcode: 78SFASD5F6A47SS

Units: box

Public Price: 72

Valid Start: 2013-05-14

List Priority: 1

On the market: No

Category: drink

Specifications: 12*500ml*1 box

Quantity: 1

Member Price: 70

Valid End: 2013-05-15

Description: Drink

Memo:

Save Back

As shown picture above, add product for testCommerce

The parameter on the add page, please refer to product

If you need to add more, please repeat this setup.

Bind E-Commerce For Customer Service

On the customer service page. Whether add or edit the customer service, it can select the E-Commerce for current customer service to bind

Customer Service Management

Edit Customer Service

Basic

Name *:	asterCC Custome...	Status:	Enable
Team:	astercc	Agent Group*:	asterCC坐席组
EventURL:	eventfile	PopupURL *:	dialininterface...
Default Read History:	yes	Add Customer Priority:	Only Individual
E-commerce:	testCommerce	CIDName:	Doubleclick to ...
CIDNum:	Doubleclick to ...	Force CallerSetting:	no
Agct AssignCustomerRegion:	no	Memo:	Doubleclick to ...

search customer page field set Agent Fields Add AgentGroup Link Return

After binded the E-Commerce, so you can see the E-Commerce part on the customer Pop page with this E-Commerce

Customer Popup Page On The Agent Work Page

Use agent's account to login the system, redirect to the agent work page, like this

asterCC

agentgroupname Check In ACW Way Work Way

Group2

Group1

May 2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Manage The Calendar >>

Agent information

- Agent No.: 2018(8f)
- teamname: astercc
- username: shixuebao

Group member

- Group2
- Group1
- Agent No.: 2019 idle

When the customer dialin,to the Customer Service,the agent will popup the customer,like



If the Customer Service bind the E-Commerce,the customer popup page's content won't show all,split the page into two picture,as below



Customer data is loaded successfully! You can search for other customers with merge Search by phone Search

Division of regional customers: center -Please Select- Confirm

Name*: Test Customer Phone1*: 5001 Phone2: 5001

Email: Doubleclick to ... Fax1: Doubleclick to ... Address1: Doubleclick to ...

Tag: BlackList: no ImportID: 0

LastContact 2013-05-21 09:44:56 LastContact 2018 Enterprise: Click Select Organization

Date: AgentNo: Province*: 辽宁省

City: 大连 OutboundIndividu 沙河河口 OutboundIndividu

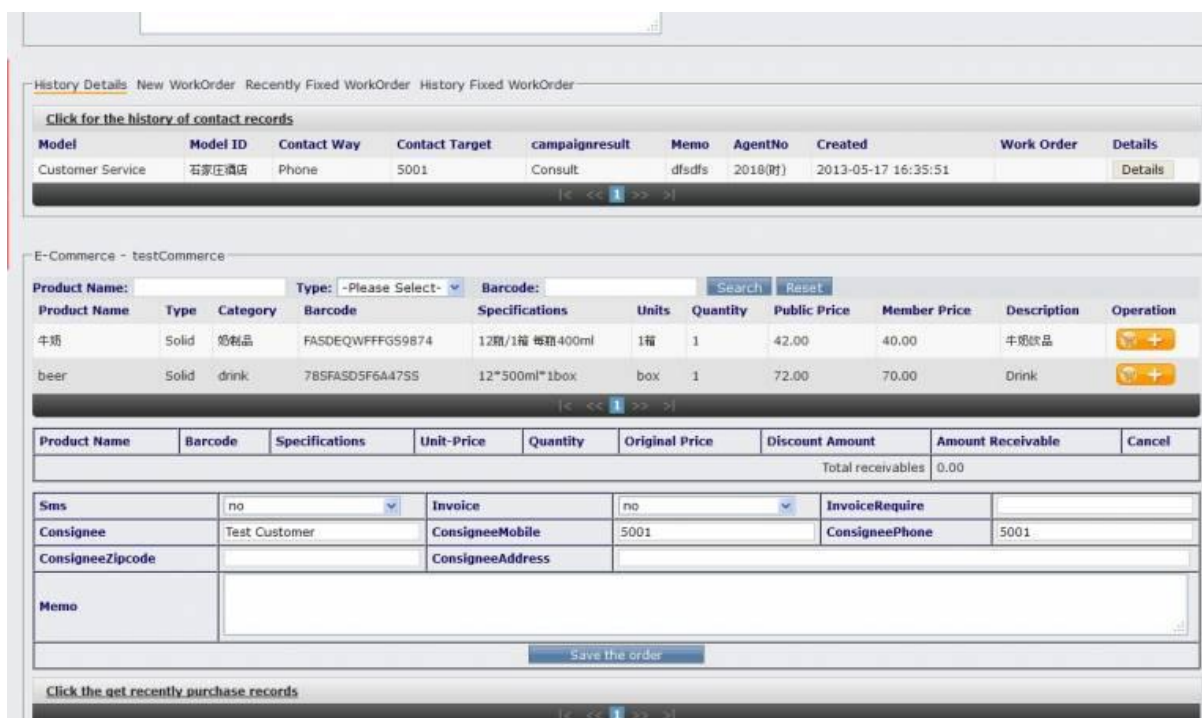
Age: Doubleclick to ... Birthday: 2013-05-15 office:

Save Customer

Contact Log

Call Result: 咨询 Create>>测试工单1 Save

Contact Memo:



History Details New WorkOrder Recently Fixed WorkOrder History Fixed WorkOrder

Click for the history of contact records

Model	Model ID	Contact Way	Contact Target	campaignresult	Memo	AgentNo	Created	Work Order	Details
Customer Service	石家庄酒店	Phone	5001	Consult	dfsdfs	2018(时)	2013-05-17 16:35:51		Details

E-Commerce - testCommerce

Product Name: Type: -Please Select- Barcode: Search Reset

Product Name	Type	Category	Barcode	Specifications	Units	Quantity	Public Price	Member Price	Description	Operation
牛奶	Solid	奶制品	FASDEQWFFG59874	12瓶/1箱 每箱400ml	1箱	1	42.00	40.00	牛奶饮品	+
beer	Solid	drink	78SFASD5F6A4755	12*500ml*1box	box	1	72.00	70.00	Drink	+

Product Name	Barcode	Specifications	Unit-Price	Quantity	Original Price	Discount Amount	Amount Receivable	Cancel
Total receivables							0.00	

Sms no Invoice no InvoiceRequire

Consignee Test Customer ConsigneeMobile 5001 ConsigneePhone 5001

ConsigneeZipcode ConsigneeAddress

Memo

Save the order

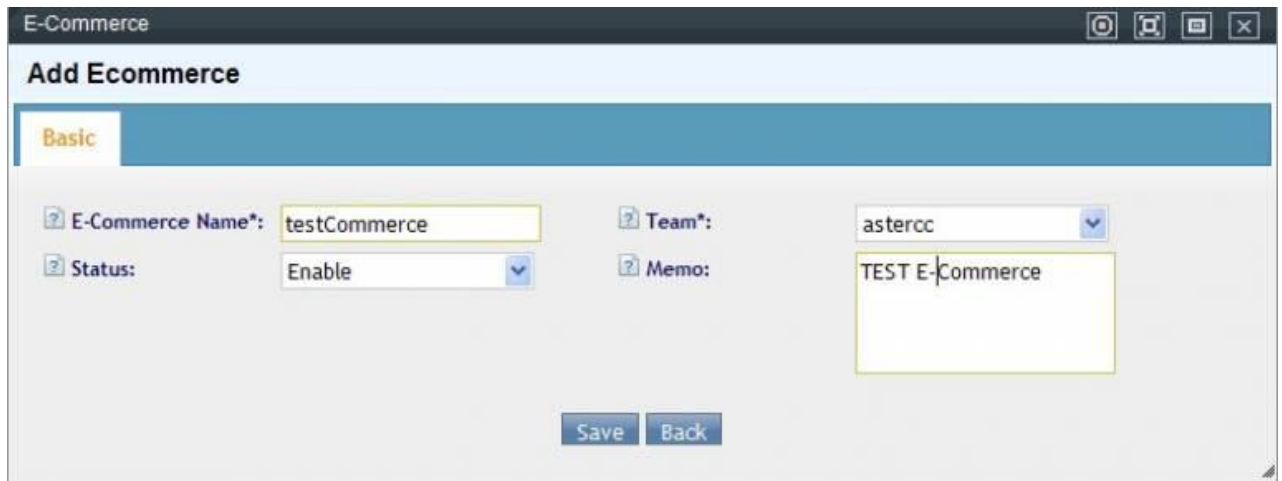
Click the get recently purchase records

As above,you can see the E-Commerce on the custoemr popup page.The agent can sale the product to customer and order it

26.7 How to Config E-Commerce In A Campaign

Create E-Commerce

- go to [E-Commerce] → [E-Commerce], click [Add].We can create different type of E-Commerce by need;



The screenshot shows a web application window titled "E-Commerce" with a sub-header "Add Ecommerce". Below the header is a tab labeled "Basic". The form contains the following fields:

- E-Commerce Name*:** A text input field containing "testCommerce".
- Team*:** A dropdown menu with "astercc" selected.
- Status:** A dropdown menu with "Enable" selected.
- Memo:** A text area containing "TEST E-Commerce".

At the bottom of the form are two buttons: "Save" and "Back".

Create Products For E-Commerce

- go to [E-Commerce] → [Products], choose the select on the top of page,choose one E-Commerce,then click [Add],add product for this E-Commerce

Products

Add Product

Basic

Product Name:	beer	On the market:	No
Type:	Solid	Category:	drink
Barcode:	78SFASD5F6A47SS	Specifications:	12*500ml*1box
Units:	box	Quantity:	1
Public Price:	72	Member Price:	70
Valid Start:	2013-05-14	Valid End:	2013-05-15
List Priority:	1	Description:	Drink
Memo:			

Save **Back**

As shown picture above,add product for testCommerce

The parameter on the add page,please refer to product

If you need to add more,please repeat this setup.

Bind E-Commerce For Campaign

On the campaign page.Whether add or edit the campaign,it can select the E-Commerce for current campaign to bind

Campaign Management

Edit Campaign

Basic | Advanced | Adv-Setting

Campaign *:	Customer visit	Status:	Enable
Priority:	Common	Customer Package:	Individual
Customer Package:	asterccctest	Use Main Table:	No
Worktime:	Any Time	Bind Survey:	海尔客户满意度调研问卷+家用空调,
Agent Obtain:	Yes	Each Fetch *	2
Agent Max. Own:	2000	Team:	astercc
Agent Group*:	Group1	Event URL:	eventfile
Campaign URL *:	dialoutinterfac...	Allow Add New:	No
Check Reassign:	No	exit ACW when submit:	Yes
Call Hint:	Yes	Default Status:	Pending
E-commerce:	testCommerce		

Report Alias | Background Fields | Agent Fields | Auto Assign Customers | Manual Assign Customers | Return

After binded the E-Commerce,so you can see the E-Commerce part on the customer Pop page with this E-Commerce

Customer Popup Page On The Agent Work Page

Use agent's account to login the system,redirect to the agent work page,like this

asterCC

agentgroupname: Check In ACW Way Work Way

Campaign: Group2

Customer visit

Test Survey

Agent Working Status

SearchFiles

Phone1: = 5001 Phone2: = Schedule: Start Time End Time

CallResult: = Please Sele AnswerNum: = Updated: Start Time End Time

Created: Start Time End Time Reset Search

Customer visit New customer lists

Name	Phone1	Phone2	Contactme	Dialschedu	CallResult	answemur	Updated
Customer5001	5001	5002		0000-00-00 00:00:00	DNC	8	2013-05-21 11:32:50

First Page << 1 >> Last Page total 1 number of data Jump To

When click the customer data in the page list or the customer dialin,the agent will popup the customer,like



If the E-Commerce is installed, and the E-Commerce is binded with the campaign, it will be shown on the customer popup page

Because the Campaign bind the E-Commerce, the customer popup page's content won't show all, split the page into two picture, as below

asterCC

Group Logout Pause ACW Dial Status Hold Consult CB Call Trans Mail Mail Email/SMS Menu

Campaign New Pending Failed Success **Option Caller**

Campaign UseSurvey
Customer visit Test Survey

Agent Working Status

This Customer Log

Name: Mr. Zhang Phone1: Doubleclick to ...
Phone2: 5001 Address1: Doubleclick to ...
Fax1: Doubleclick to ... Email: Doubleclick to ...
Flag: Doubleclick to edit

Contact Log

Status: Pending CallResult: Answered Workorder Schedule: 2013-05-22 10:05
Priority: 0 Save
Contact Memo:

History Details

Click for the history of contact records

E-Commerce - testCommerce

Product Name: Type: -Please Select- Barcode: Search Reset

Product Name	Type	Category	Barcode	Specifications	Units	Quantity	Public Price	Member Price	Description	Operation
牛奶	Solid	奶制品	FASDEQWFFFGS9874	12箱/1箱 每箱400ml	1箱	1	42.00	40.00	牛奶饮品	+ -
beer	Solid	drink	78SFASD5F6A475S	12*500ml*1box	box	1	72.00	70.00	Drink	+ -

Total receivables 0.00

Sms	no	Invoice	no	InvoiceRequire	
Consignee	李杨	ConsigneeMobile		ConsigneePhone	5001
ConsigneeZipcode		ConsigneeAddress			

Memo


Save the order

Click the get recently purchase records

Explain the E-Commerce on the customer popup page:

E-Commerce - testCommerce

Product Name: Type: Barcode:

Product Name	Type	Category	Barcode	Specifications	Units	Quantity	Public Price	Member Price	Description	Operation
beer	Solid	drink	78SFASD5F6A47SS	12*500ml*1box	box	1	72.00	70.00	Drink	 <input data-bbox="1380 336 1412 380" type="button" value="+"/>

|< << 1 >> >|

Product Name	Barcode	Specifications	Unit-Price	Quantity	Original Price	Discount Amount	Amount Receivable	Cancel
							Total receivables	0.00

Sms	<input type="text" value="no"/>	Invoice	<input type="text" value="no"/>	InvoiceRequire	<input type="text"/>
Consignee	Customer 5001	ConsigneeMobile	<input type="text"/>	ConsigneePhone	5001
ConsigneeZipcode	<input type="text"/>	ConsigneeAddress	<input type="text"/>		
Memo	<input type="text"/>				

[Click the get recently purchase records](#)

|< << 1 >> >|

In box ①, can search the product by `Product Name` `Type` and `Barcode`, the search result will be shown at box ② list

box ③ show the product which the agent is choosing product for customer, can click the order button behind the product message to order the product. After click, the box ③ will show the ordered product

Can modify the `Unit-Price` `Quantity` `Original Price` `Discount Amount` `Amount Receivable` of product, if wanna cancel the product, click the cancel button behind every ordered product

In box ④, when finished choose the products, can save the purchase order for customer. `Consignee` will be automatically entered the popup customer's name, `ConsigneeMobile` will be automatically entered the popup customer's phone1 and `ConsigneePhone` will be automatically entered the popup customer's phone2. Finished order message, click `Save the order` button to save order, if save successfully, it will get the message.

In box ⑤, it shows the recent purchase records, Default is not loading the data, need to click `Click the get recently purchase records` link to get data. The recent purchase record will be shown in the data list.

[Click the get recently purchase records](#)

ID	OrderCode	Model	Model ID	Product Name	Quantity	Unit-Price	Original Price	Discount Amount	Amount Receivable	AgentNo	Created
7	00000000005	Campaign	Customer visit	beer	2	72.00	144.00	20.00	124.00	2018	2013-05-21 09:57:28

|< << 1 >> >|

As above, it shows the recent purchase records of every product's order record

- OrderCode : The order code of the purchase order
- Model : the module which created the order
- Model ID : the module's name which created the order
- Product Name : the product name of the order

- Quantity : the purchase number with this product
- Unit-Price : the unit price of this product
- Original Price:the original price of this product.Maybe the agent discount the product for customer
- Discount Amount:the discount number of this product which the agent discount for customer
- Amount Receivable:the final transaction price of the order,after discount.
- AgentNo:the agentno who created the purchase order
- Created:when created the order

As above picture,add one prodcut for testCommerce

The premeter on the add page,refer to product

As box ⑤,Customer5001 buy the product,will create the order and purchase records,that's will be shown on the `Orders` and `History Orders` under the E-Commerce module.

go to [E-Commerce] → [E-Commerce] ,open the page,like this

The screenshot shows the EQUINET VINA-PBX E-Commerce module interface. On the left, a sidebar menu lists various system modules, with 'E-Commerce' expanded and 'Orders' selected. The main content area displays a search form for orders. The form includes fields for OrderCode, Model Name, Customer Name, Original Price, Discount Amount, Amount Receivable, Express Name, ExpressCode, DeliveryMan, DeliveryPhone, DeliveryMobile, Consignee, ConsigneePhone, ConsigneeMobile, ConsigneeAddress, ConsigneeZipcode, Status, Sms, SmsUndelivered, SmsShipped, Invoice, InvoiceRequire, InvoiceCode, IsVerify, Memo, Account, Agent, ShippedDate, ArrivalDate, Created, and Updated. A red box highlights the 'Please Select' dropdown for the 'Status' field. Below the form is a table with columns: OrderCode, Model Type, Model Name, Customer Name, and Status. The table shows 'Listed 0 - 0 Records, Total 0 Records, Total 0 Page Jump To'.

choose the select in the red box on the top,and choose `testCommerce`,like this

OrderCode	Model Type	Model Name	Customer Name	Status
00000000005	Campaign	Customer visit	Customer5001	undelivered
00000000004	Customerservice			undelivered
00000000002	Customerservice			undelivered
00000000001	Customerservice			undelivered

As above,you can see the order message of the customer `Customer5001` (00000000005)

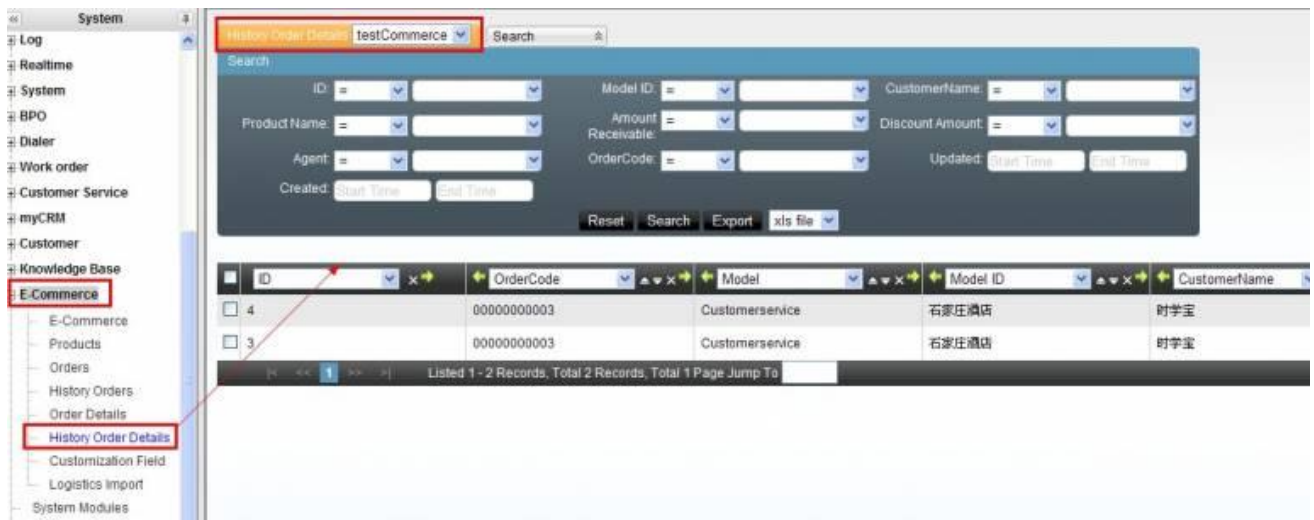


Why the order message of the `Module Type` is Customerservice in the page list?Because the E-Commerce can be binded to Customer Service too,and the customer of Customer Service had the order

go to [E-Commerce] → [Orders],open the page,like this:

ID	OrderCode	Model	Model ID	CustomerName
0				

choose the select in the red box on the top,and choose `testCommerce`,like this



Can set the premeter `E-commerce data RetentionTime` under `LargeData Process` in the setting page to control how long the order and the purchase records reserved

E-commerce data RetentionTime	MONTH:AllWEEK:AllDAY:AllHOUR:14MINUTE:6	The recent E-commerce data retention time(day).
	90	

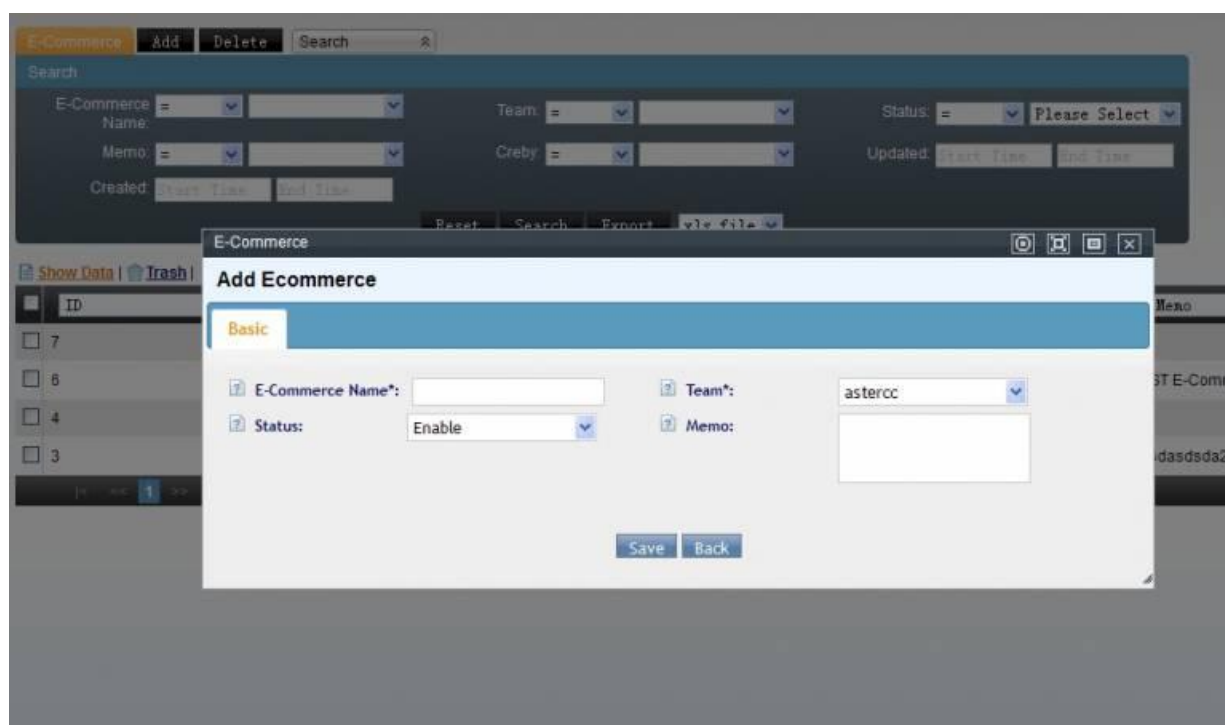
the system can deal with the order and purchase records which created before the premeter value By this premeter to `History Orders` and `History Order Details` by this premeter

Can go to [E-Commerce] → [History Orders] and [History Order Details] to view the history order and purchase records

26.8 How to use E-Commerce in the Customer Service

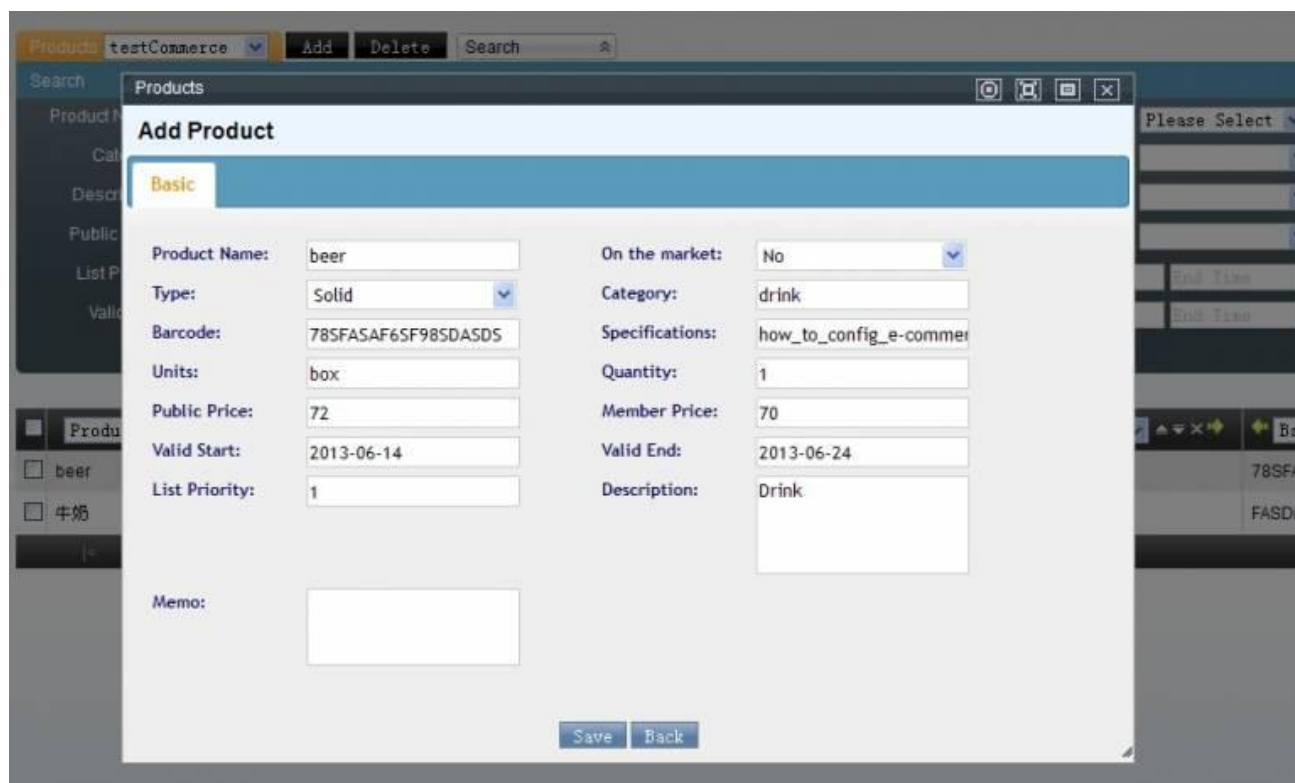
Create E-Commerce

- On the leftmenu,go to [E-Commerce] → [E-Commerce], click [Add] button. According to different needs, we can create different E-Commerce



Add product for E-Commerce

- On the left menu, go to [E-Commerce] → [Products], Choose the assigned E-Commerce by the select on the top of page, then click [Add] button to add product for the E-Commerce



As above,add one product for `testCommerce`

The parameter on the add page,refer to Product

If need to add many products for current E-Commerce,please repeat the step,untill finished to add product

Bind E-Commerce

On the add page or edit page,both can bind the E-Commerce for the Customer Service

The screenshot shows the 'Edit Customer Service' form in the 'Customer Service Management' system. The 'Basic' tab is active. The form contains the following fields:

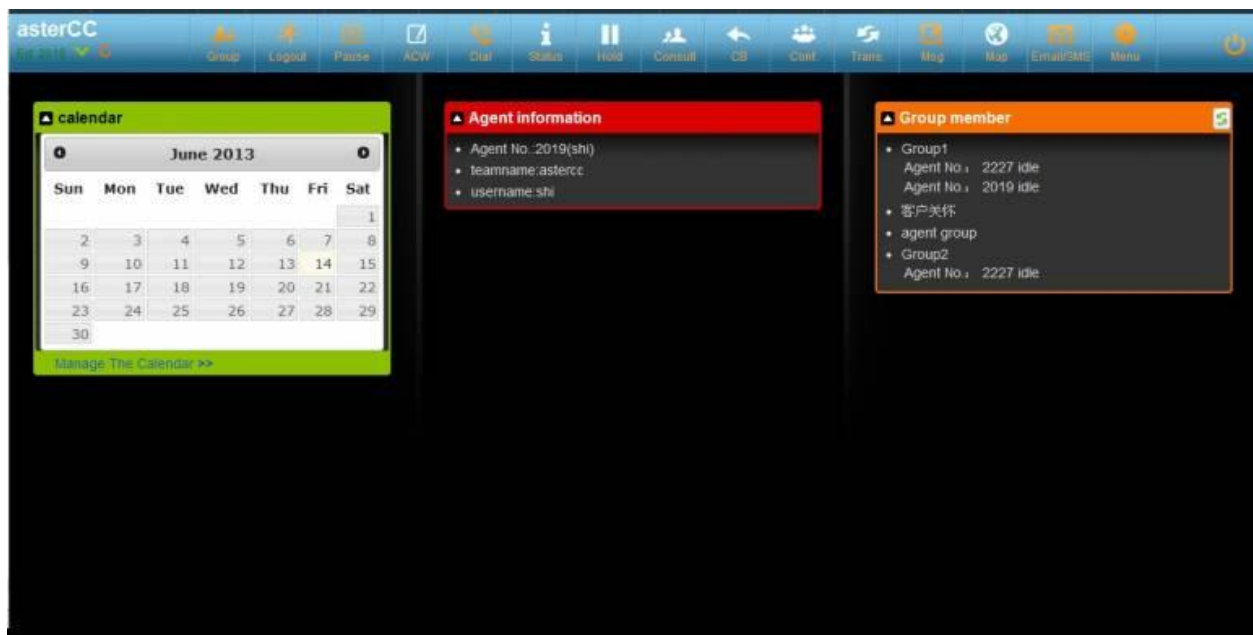
Field	Value
Name *	asterCC Custome...
Team	astercc
EventURL	eventfile
Default Read History	yes
E-commerce	testCommerce
CIDNum	Doubleclick to ...
ConsultAgent IsEdit	no
Memo	Doubleclick to ...
Status	Enable
Agent Group*	asterCC坐席组
PopupURL *	dialininterface...
Add Customer Priority	Only Individual
CIDName	Doubleclick to ...
Force CallerSetting	no
Agel AssignCustomerRegion	no

At the bottom of the form, there are four buttons: 'search customer page field set', 'Agent Fields', 'Add AgentGroup Link', and 'Return'.

After binded the E-Commerce,can see the binded E-Commerce on the customer popup page

E-Commerce of the customer popup page on Agent Work Portal Page

login the system by agent,login the agentgroup to work,like this:



The customer will popup when the call dialin



The content is long on the customer popup page, so split the page into two pages to show. you can see the E-Commerce by scroll bar



History Details New WorkOrder Recently Fixed WorkOrder History Fixed WorkOrder

Click for the history of contact records

Model	Model ID	Contact Way	Contact Target	campaignresult	Memo	AgentNo	Created	Work Order	Details
Customer Service	石家庄酒店	Phone	5001	Consult	dfsdfs	2018(时)	2013-05-17 16:35:51		Details

E-Commerce - testCommerce

Product Name: Type: -Please Select- Barcode: Search Reset

Product Name	Type	Category	Barcode	Specifications	Units	Quantity	Public Price	Member Price	Description	Operation
牛奶	Solid	奶制品	FASDEQWFFFGS9874	12瓶/1箱 每瓶400ml	1箱	1	42.00	40.00	牛奶饮品	
beer	Solid	drink	78SFASD5F6A47S5	12*500ml*1box	box	1	72.00	70.00	Drink	

Product Name	Barcode	Specifications	Unit-Price	Quantity	Original Price	Discount Amount	Amount Receivable	Cancel
Total receivables							0.00	

Sms	no	Invoice	no	InvoiceRequire	
Consignee	Test Customer	ConsigneeMobile	5001	ConsigneePhone	5001
ConsigneeZipcode		ConsigneeAddress			
Memo					

Save the order

Click the get recently purchase records

As above,can see the binded E-Commerce on the customer popup page.So the agent can sale the products and create order for customer.

26.9 how to configure a voice survey with predictive dialer

1)Mass upload sound files

login to system, go to Add Sounds page, according to introduction:

System

PBX

Advanced

- Queues
- Worktimes
- Worktime Packages
- Trunk Groups
- Templates
- Inbound Routes
- Outbound Routes
- Blacklists
- Whitelists
- CID Restricts
- Conferences
- Meetmes
- MOHs
- Announcements
- IVRs
- Sounds
- Add Sounds**
- Applications
- DAHDI
- BLF Group

Bulk Upload How to?

Instructions for use

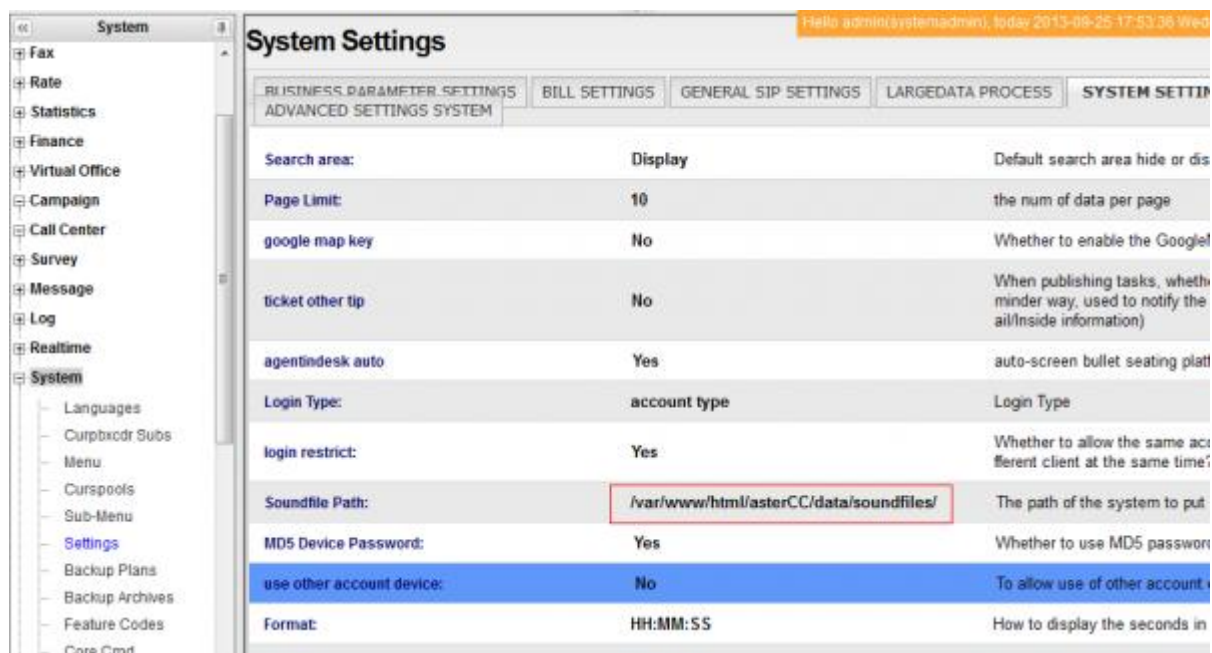
- 1.The sound files are uploaded to the System Settings->Soundfile Path
- 2.Path rule: TeamIdentity\LanguageCode\soundfiles(Only belongs to a team) OR LanguageCode\soundfiles(Does not belong to any team)
- 3.Select a team, the sound files add to team.
- 4.If you checked **Sound File**, representative list only MP3 and WAV format file upload.
- 5.Click **Execute** button, the selected sound files will be added to the database.

Select Team: --Please Select-- Sound File: ☐ Execute

Sound Filelist

File Name	Language	en	cn	jp	kr	ru	de	es
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

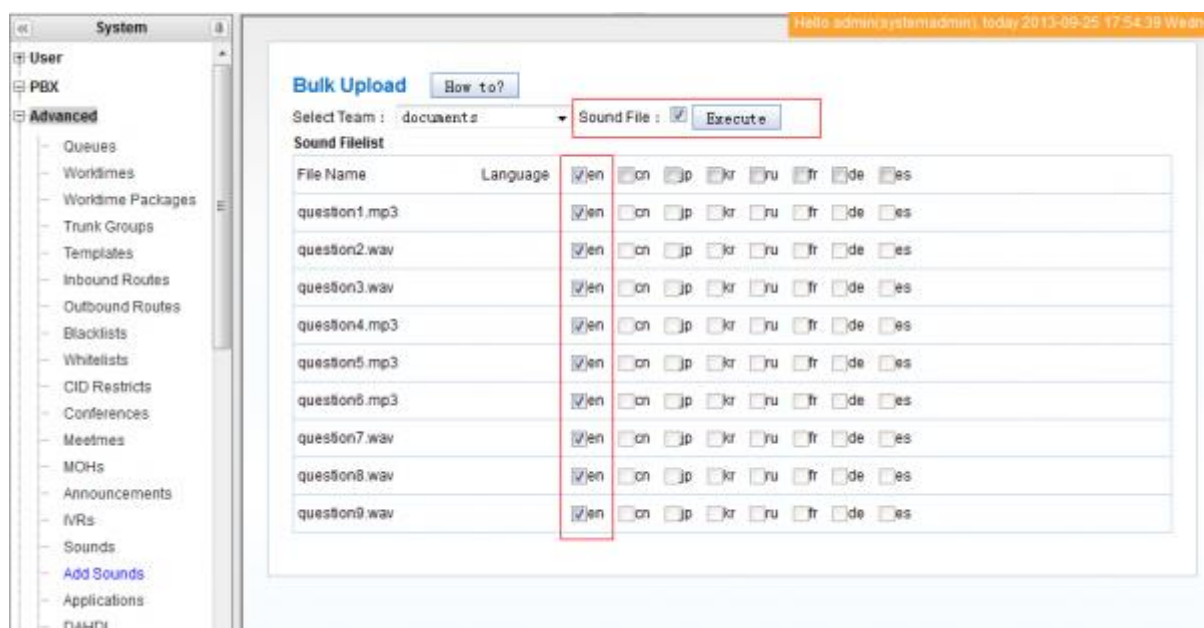
upload sound files to Soundfile Path that set in system settings page with ftp or sftp.



Search area:	Display	Default search area hide or display
Page Limit:	10	the num of data per page
google map key	No	Whether to enable the Google
ticket other tip	No	When publishing tasks, whether to use the reminder way, used to notify the user (inside information)
agentindesk auto	Yes	auto-screen bullet seating platform
Login Type:	account type	Login Type
login restrict:	Yes	Whether to allow the same account to be used by different clients at the same time
Soundfile Path:	<u>/var/www/html/asterCC/data/soundfiles/</u>	The path of the system to put soundfiles
MD5 Device Password:	Yes	Whether to use MD5 password
use other account device:	No	To allow use of other accounts
Format:	HH:MM:SS	How to display the seconds in

the default Soundfile Path is "/var/www/html/asterCC/data/soundfiles/" , you should create directory teamidentity/languagecode under this path. like this("document" is the teamidentity): /var/www/html/asterCC/data/soundfiles/document/cn

click Execute button to upload



File Name	Language	<input checked="" type="checkbox"/> en	<input type="checkbox"/> cn	<input type="checkbox"/> jp	<input type="checkbox"/> kr	<input type="checkbox"/> ru	<input type="checkbox"/> fr	<input type="checkbox"/> de	<input type="checkbox"/> es
question1.mp3		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
question2.wav		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
question3.wav		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
question4.mp3		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
question5.mp3		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
question6.mp3		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
question7.wav		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
question8.wav		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
question9.wav		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

View uploaded soundfiles in Advanced/Announcements

The screenshot shows the 'Announcements' menu on the left sidebar, which is highlighted with a red box. The main area displays a table of announcements. The table has columns for Name, Team, Description, and Created. The 'Name' column is highlighted with a red box, and the 'question4' row is highlighted with a blue box.

Name	Team	Description	Created
question9	documents	admin Batch processing.	2013-09-25 17:55
question8	documents	admin Batch processing.	2013-09-25 17:55
question7	documents	admin Batch processing.	2013-09-25 17:55
question6	documents	admin Batch processing.	2013-09-25 17:55
question5	documents	admin Batch processing.	2013-09-25 17:55
question4	documents	admin Batch processing.	2013-09-25 17:55
question3	documents	admin Batch processing.	2013-09-25 17:55
question2	documents	admin Batch processing.	2013-09-25 17:55
question1	documents	admin Batch processing.	2013-09-25 17:55
welcome	documents	admin Batch processing.	2013-09-24 13:43

At the bottom of the table, it says: Listed 1 - 10 Records, Total 61 Records, Total 7 Page Jump To

2) Add a Survey

When you upload all your voice files, go to Survey → Surveys, to add a new Survey

Here you need name the survey, in surveytype, select "voicetype" then go to Advanced, select the welcome announcement and end announcement in the survey.

select Yes for "Close Quota", because in voicesurvey, it doesn't support quota yet. (quota is used when you only want get a number of survey from specific people, like 30 men, 30 women, survey will end if we already have enough survey)

The screenshot shows the 'Add Survey' form in the 'Survey Management' section. The form has two tabs: 'Basic' and 'Advanced'. The 'Basic' tab is selected. The form contains the following fields:

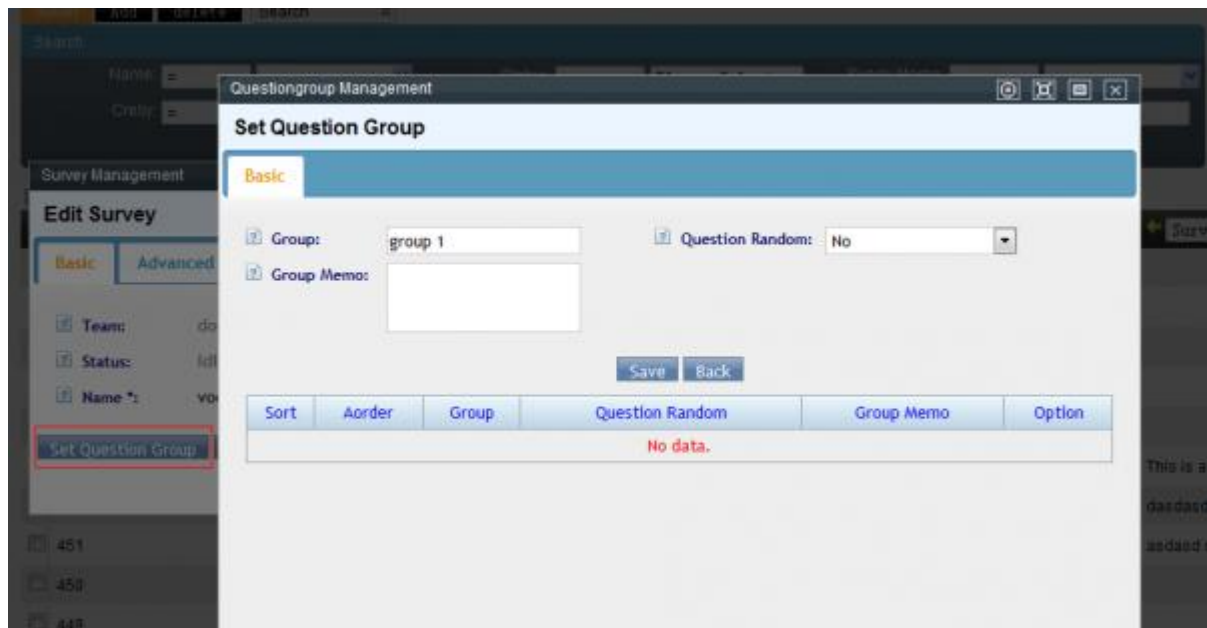
- Team:** documents
- Status:** Idle
- Name *:** voice survey1
- surveytype:** voicetype
- ClosedQuota:** Yes
- Save** and **Back** buttons

Below the 'Basic' tab, the 'Advanced' tab is visible. It contains the following fields:

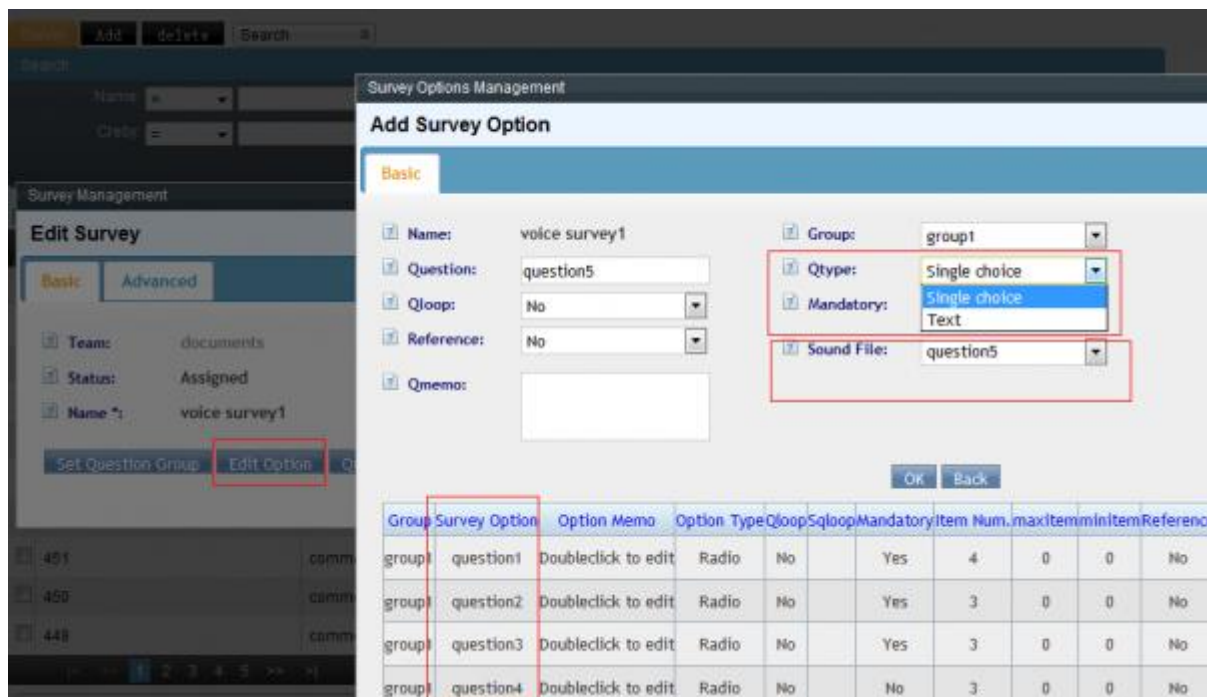
- Welcome word:** welcome
- End word:** bbbbbb
- Quotatext:** (empty text area)
- Survey Memo:** (empty text area)

At the bottom of the form, it says: Listed 1 - 10 Records, Total 263 Records, Total 27 Page Jump To

You need group all the questions for easier management, so we need add Question Group first



Then we start to add questions



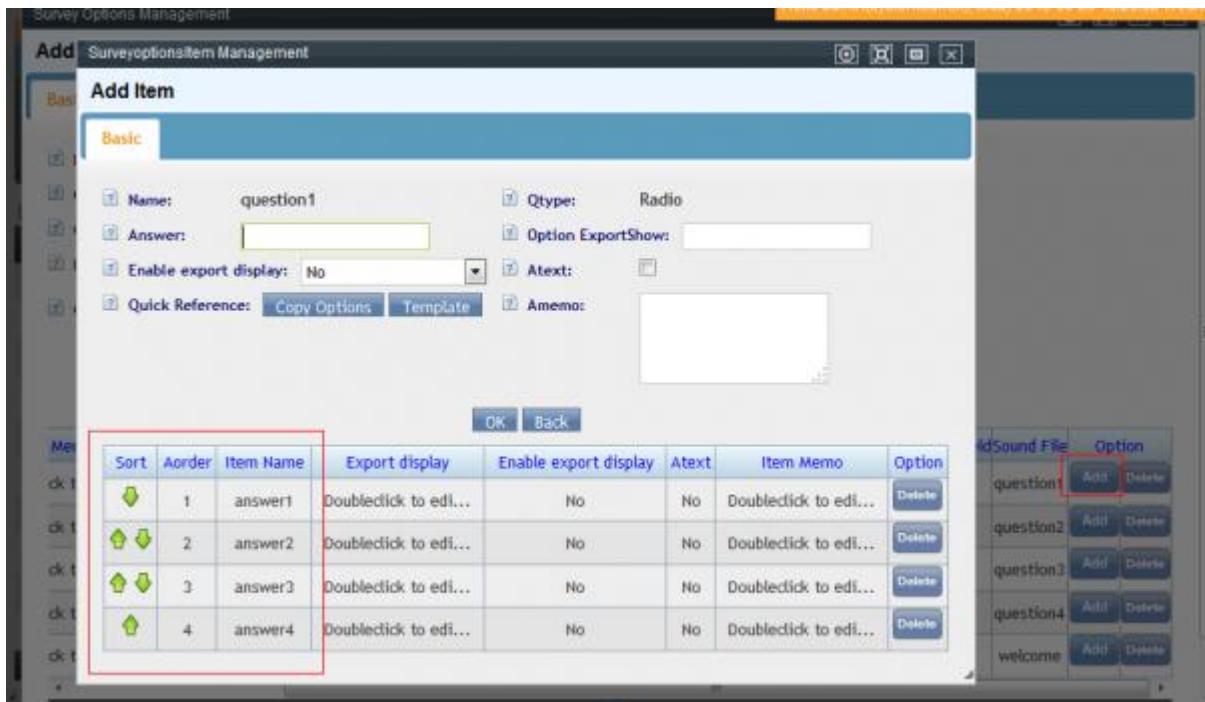
In a voice survey, for now we only have two types "single choose" and "text" Example: Single Choose: please rate for the service: press 1 for worse, 2 for normal, 3 for satisfy, 4 for wonderful Text: please give a score for the service, from 0 to 100. Compared with the general questionnaire, you need to select an announcement for each question (the files you uploaded above). Mandatory: when callee answer the question via phone pad, when the 1st time it plays the questions, callee doesn't input anything or they press a invalid key,

system will play the question again, if system still could not get a valid input, and this question is mandatory, the survey will end with a failure result, on the other way, if it is not mandatory, system will go to next question.

When it's set, click "OK" for next question.

After the question is set, if it's "Single Choose", you need put options for it(text question doesn't need this step), it has no different with the regular question.

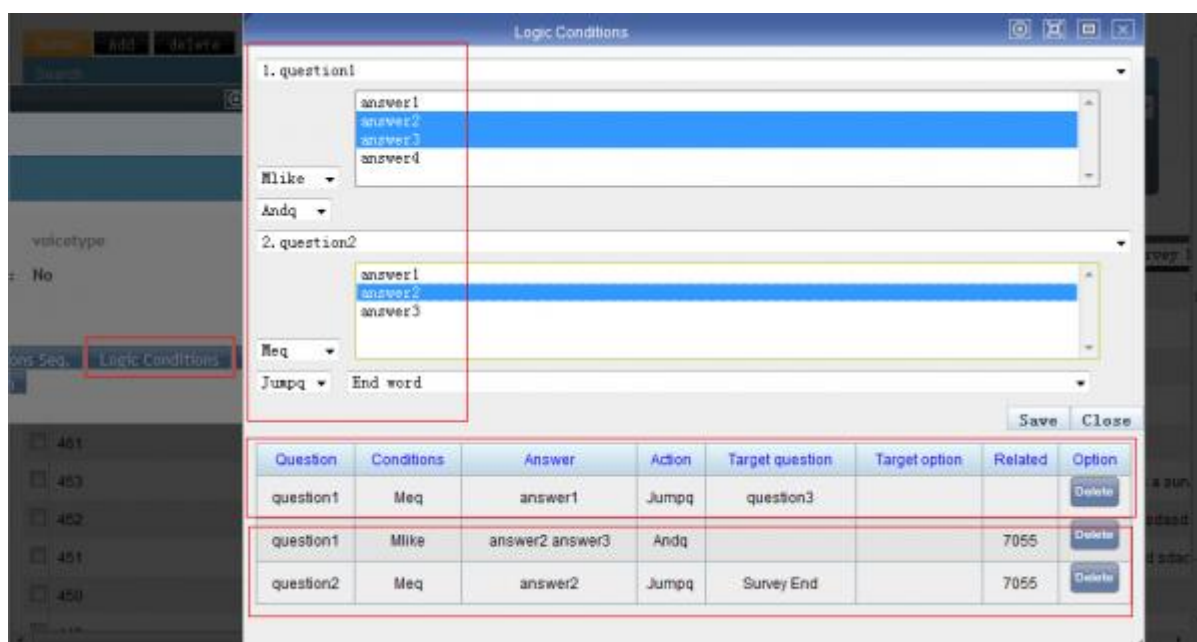
Please note that the user key input numbers and the serial number is the corresponding option, the user inputs 1, it shows chose the first answer to this question, so when you want to record a voice note and answers correspondence.



The screenshot shows the 'Survey Options Management' window with the 'Add Item' dialog open. The dialog has a 'Basic' tab and fields for Name, Answer, Qtype, Option ExportShow, Enable export display, Quick Reference, Atext, and Amemo. Below the dialog is a table with columns: Sort, Aorder, Item Name, Export display, Enable export display, Atext, Item Memo, and Option. The table contains four rows of options for 'question1'.

Sort	Aorder	Item Name	Export display	Enable export display	Atext	Item Memo	Option
1	1	answer1	Doubleclick to edi...	No	No	Doubleclick to edi...	Delete
2	2	answer2	Doubleclick to edi...	No	No	Doubleclick to edi...	Delete
3	3	answer3	Doubleclick to edi...	No	No	Doubleclick to edi...	Delete
4	4	answer4	Doubleclick to edi...	No	No	Doubleclick to edi...	Delete

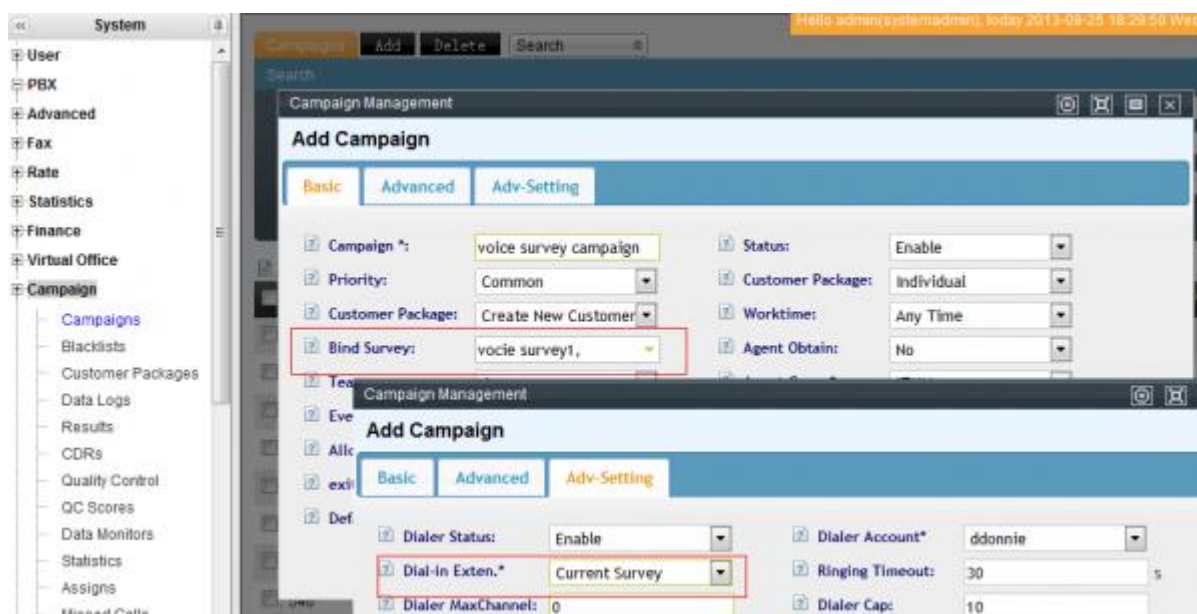
If you need to follow the user to enter the questionnaire answers questions to jump, then you need to set the questionnaire logic, set in the same way with ordinary questionnaire



The figure above jumps to set up two logical rules, one is a single conditional jump (choose one of the options for question 1 1, jump to question 3), and the other one is a compound conditional jumps (when the problem a select option 2 or three, and the answer to question 2 select 2, the end of the questionnaire)

3)Add a campaign

Go to Campaign → Campaigns, create a campaign for the survey, and you need select an agent group for the campaign(even no agent need in this campaign at all), and select the voice survey we just created. In tag "Adv-Setting" → Dial-in Exten, choose Current Survey, then when customer answer a call, system will transfer the call to the voice survey which is bound with the campaign.

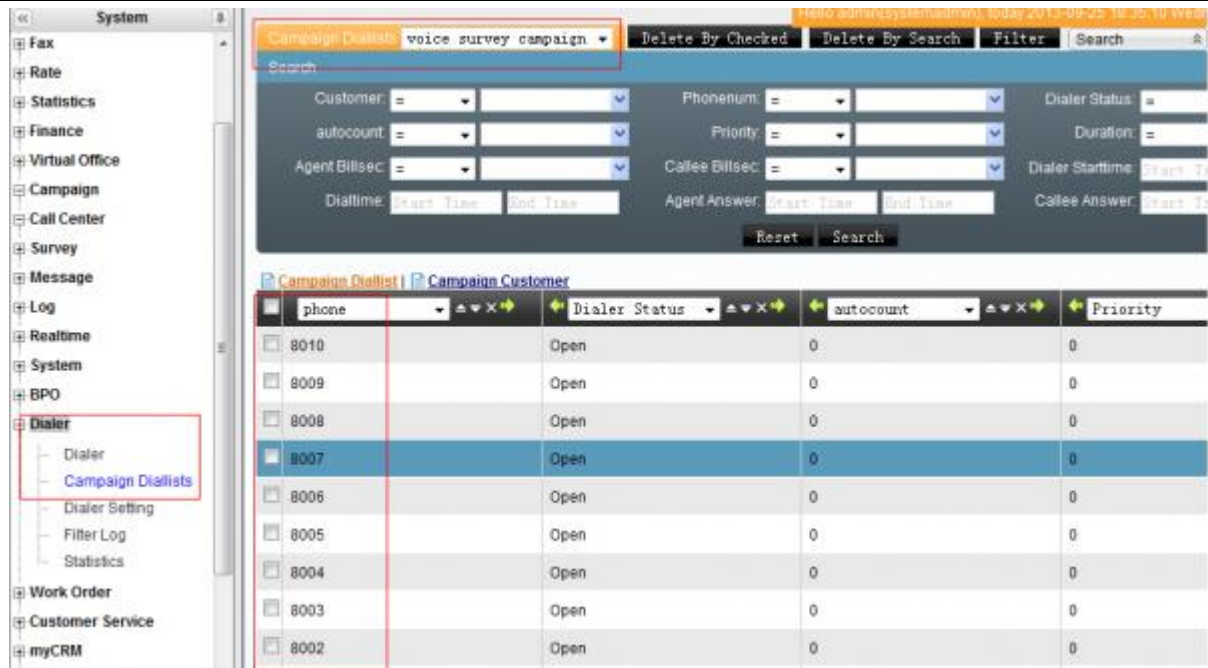


Import of pre-dial numbers, number list file upload (comma separated csv mode, utf8 coding best), select the team and select the previous step to create a task corresponding outbound client package (selection table), select the corresponding column in the list corresponds to customer data item, select the telephone number listed below pre-dial telephone (numbers only checked into the pre-dial list), and click the data into a table to generate export plan.

Go to Call Center → Shell Import Job, you can see the status of the importing job.

ID	Target	Filename	Status	Total	Success	Error	Duplicate	Success Rate	Executed At	Creby	Success Data
23	voice survey campaign	success_5_3333.csv	Import	0	0	0	0	0%	2013-09-25 18:33:00	admin	

When it's done, you can go to Campaign → Customers to check the customer list, go to Dialer → Campaign Diallist to check the numbers in dialer list.



4) Start Dialer

Go to Dialer → Dialer, select the team, find the campaign, because we don't need agent in the voice survey, we just use "By Max Calls" which means how many concurrent calls this campaign will have, click "Start" to fire.

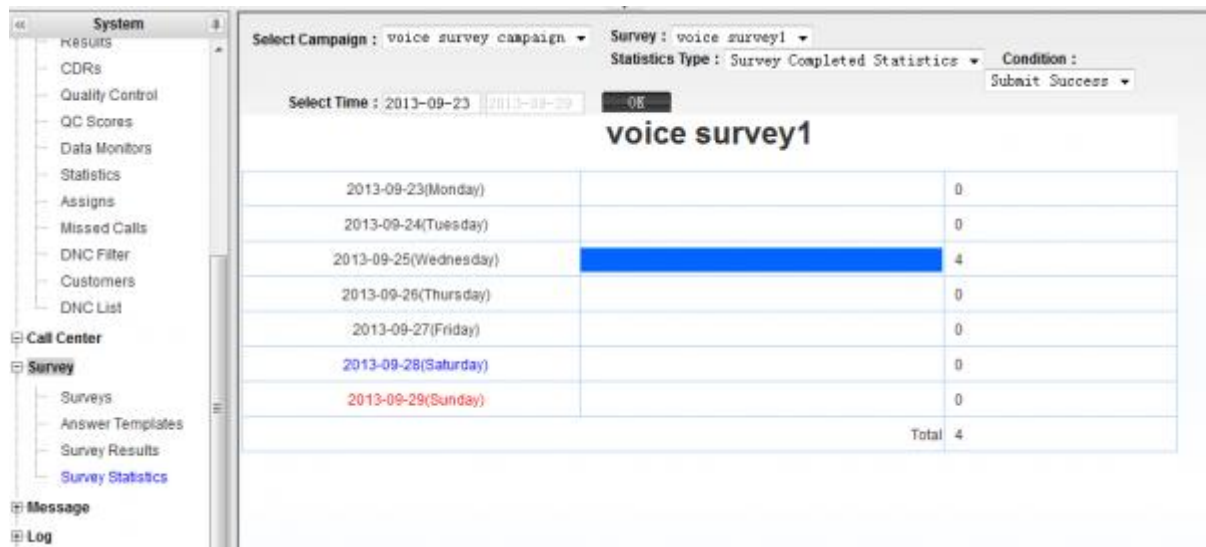


Customer Answered means it's connected.

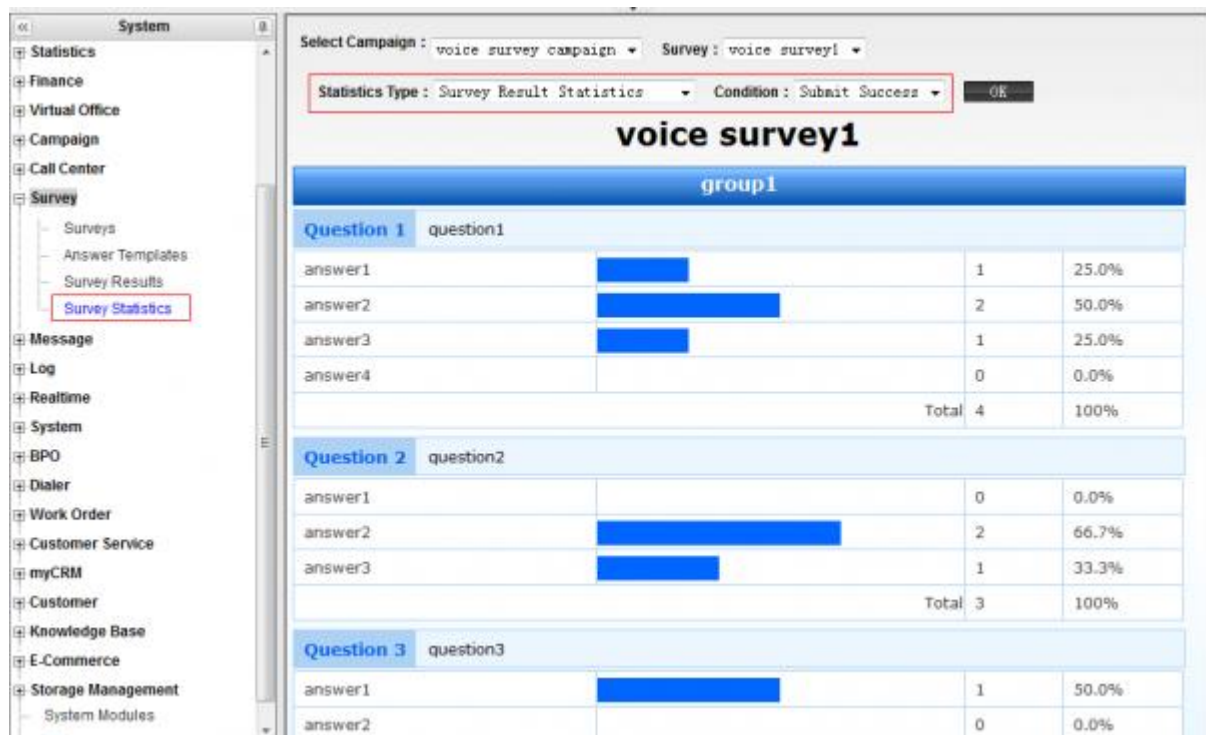
5) Statistics

Go to Survey → Survey Statistics, you can get

How many callees finished the survey.



The scale for each option in a question.



For detail, you can go to Campaign → Quality Control to check

The screenshot displays the 'voice survey campaign' search interface. The top section contains a search bar with 'voice survey campaign' and 'voice survey1' entered. Below this is a grid of filters including QC Status, Agent No., Name, Fax, Country, CallResult, Created, Resue, Status, Gender, Email, Memo, Contactmemo, Birthay, QC Agent No., Phone, Age, Address1, Flag, and Updated. At the bottom of the filters are buttons for 'Reset', 'Search', and 'Export' with a dropdown for 'xlsx file'.

phone1	Status	No1Title	No2Title	No3Title	No4Title	No5Title
8000	errordosed	answer4	answer2	answer3		
8001	errordosed					
8004	successdosed	answer1		answer1	answer1	100
8005	successdosed	answer2	answer2			
8006	successdosed	answer3	answer3	answer3	answer3	50
8007	errordosed					
8008	successdosed	answer2	answer2			
8009	errordosed					
8010	errordosed					

8000: customer answered 1,2,3 and then hangup, error closed

8004: customer answered, choose option 1 in the 1st question, and jump to question 3 by the logical in question, and finished all rest question 3 4 5, so it is success closed

8005: customer choose option 2 in the 1st question, jump to end, then it is a success closed.

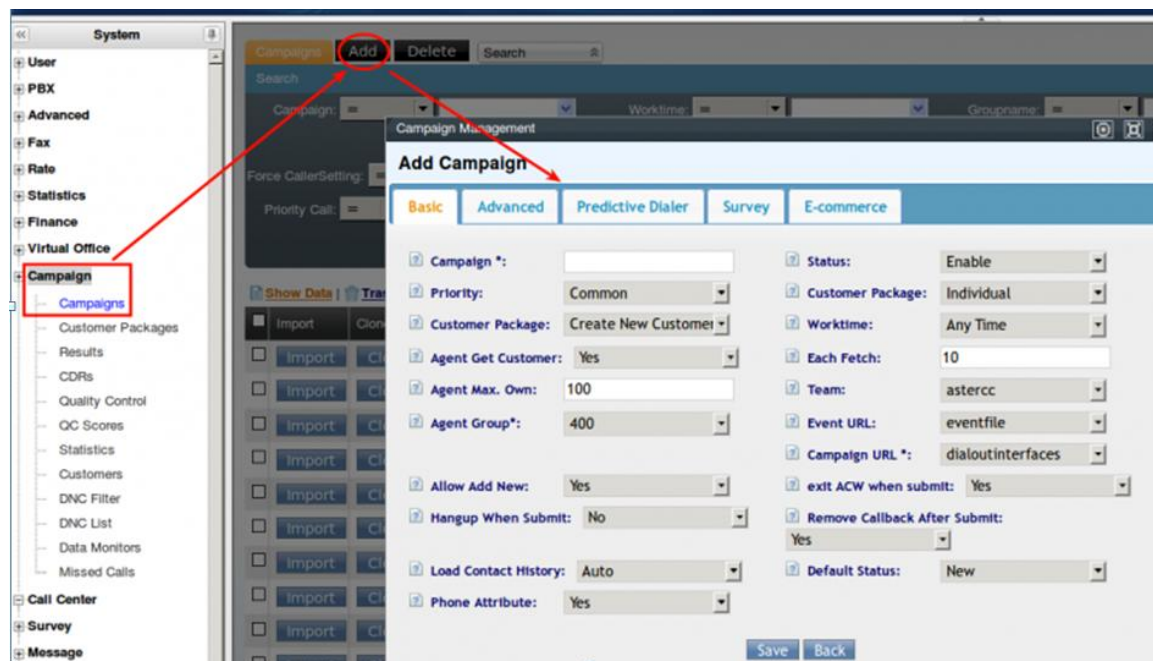
8006: answer all questions, success closed

8007 8009 8010: customer has no valid input, error close

26.10 How to Config Inbound Popup for Campaign

1) Create the Campaign

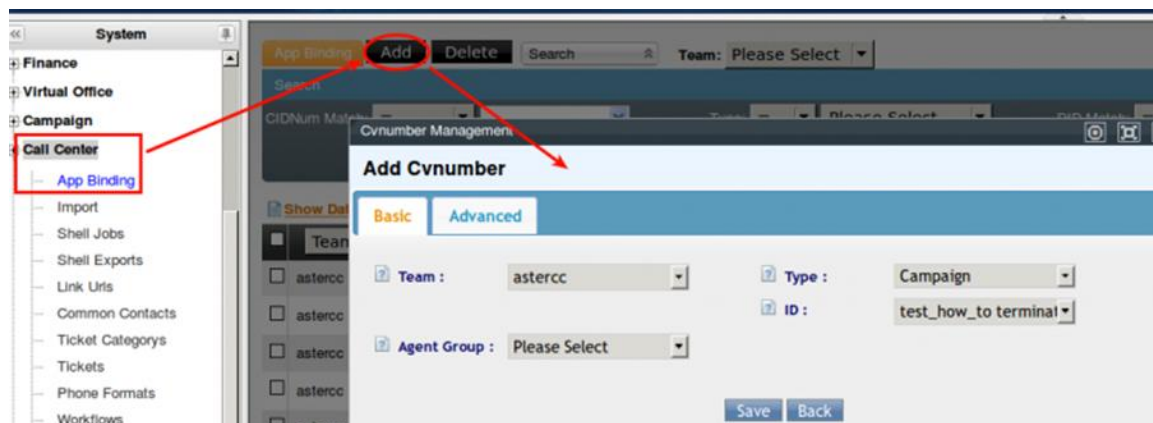
Go to [Campaign] → [Campaigns], you can go to adding interface via click "Add" on the top of page, as the figure shown below:



You can refer to Campaigns to realize the meaning of fields in this interface, then configure it according to your needs.

2) Add the Application Binding

After added the campaign, we will go to [Call Center] → [App Binding] and bind the application with DID number.



Select the target of campaign after selecting the “Type”, you also add limit of DID and CIDNumber at the same time.

3)The Inbound Popup on Agent Portal

AgentNo	CallType	campaignresult	Status	Memo
8000	DialIn	已购买其他产品	Pending	
8000	DialIn	退出再联系	Pending	

The details of customer will popup under the campaign dialout interface, although the customer dialed in. You can modify and save the details after double-click. And the History details is following, include AgentNo, CallType, CampaignResult and so on.

26.11 How to customize customer information fields and import data



When we try to import data to the customer package, the column doesn't exist, we have to customise new fields in the customer package to match the newly added customer information, and import the corresponding customer information. We will learn how to do this in this chapter.

1) Add custom fields in the outbound list

Under the system management page, callcenter outbound → customise fields,

The screenshot shows a web application window titled 'Customize Fields'. Inside, there's a section 'Add Customfield' with a 'Basic' tab selected. The form contains the following fields:

- Tablename:** A dropdown menu with 'ap_outbound_individu' selected.
- Fieldtype:** A dropdown menu with 'input' selected.
- Fieldname *:** An empty text input field.
- Fieldlanguage *:** An empty text input field.
- Selectoption:** An empty text input field.
- Teamname:** A dropdown menu with 'Please Select' selected.
- Customerpackage:** A dropdown menu with 'Select Options' selected.
- Language:** A dropdown menu with 'English' selected.
- Creby:** A text input field with 'admin' entered.


At the bottom of the form are two buttons: 'Save' and 'Back'.

The system provides more than 30 basic fields by default for the 2 customer information lists. When dealing with special customer information groups, and the data cannot be input with the default fields, you can add fields that are needed here to those lists.


Choose the Tablename, for enterprise customer or individual customer list.

Fieldtype: four for option: input, select, text, datetime

The interfaces differ when you choose different fieldtype:

input  ;

select  , you can select in the dropdown menu;

text  , you need to enter text;



datetime Monday, 26. Mar 2012 15:24, you need to enter time here.

Fieldname: the name of the newly added field, and may contain letters and numbers. The name cannot be started with a number. Fieldlanguage: enter the fieldname to be displayed. If the default language is Chinese, you should enter a Chinese name, and the same applies to English.

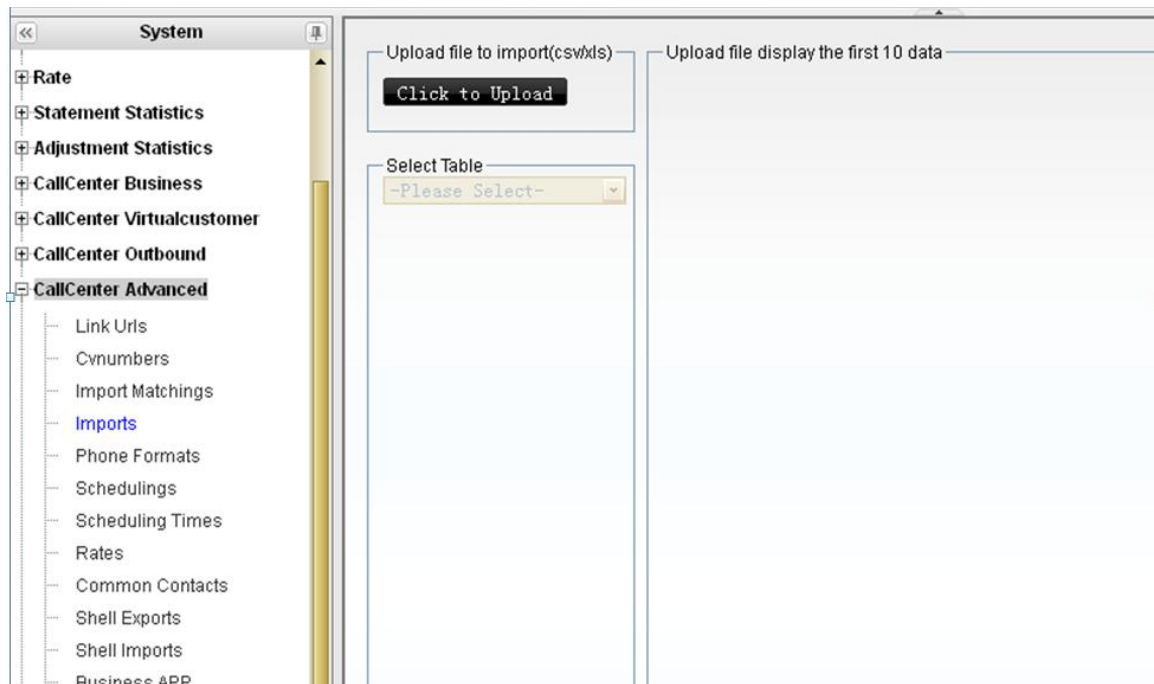
If you are going to add a identification number field, enter "identification number" in the fieldlanguage (on condition that the default language of the system is English).

After choosing teamname and customer package, click [save].

And now, you have finished adding a custom field, and the new data will be shown at top of the list.

2)Import data of customers

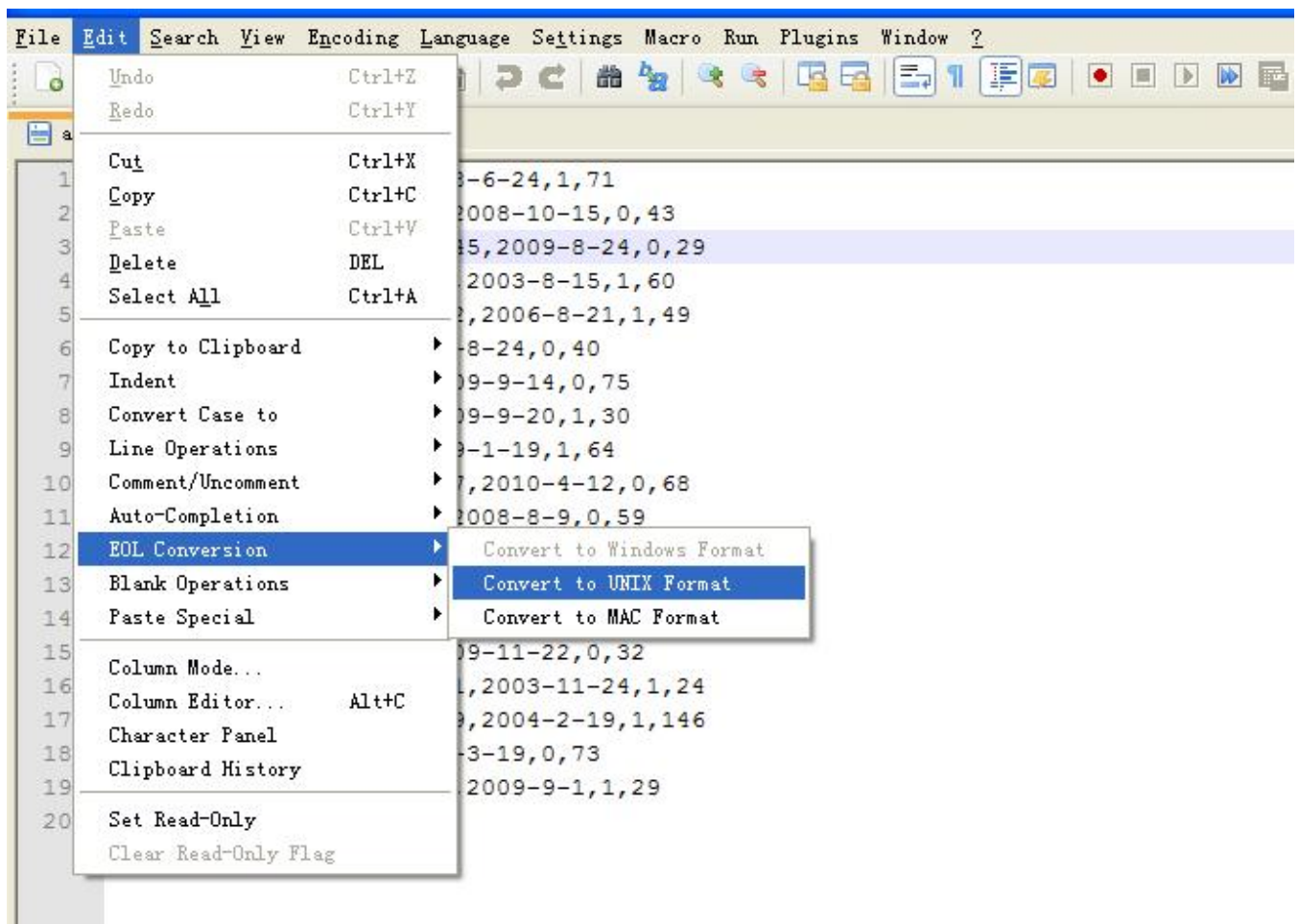
Then we are going to import the customer information which involves these fields. Under the system management, opne Callcenter advanced→ Imports.

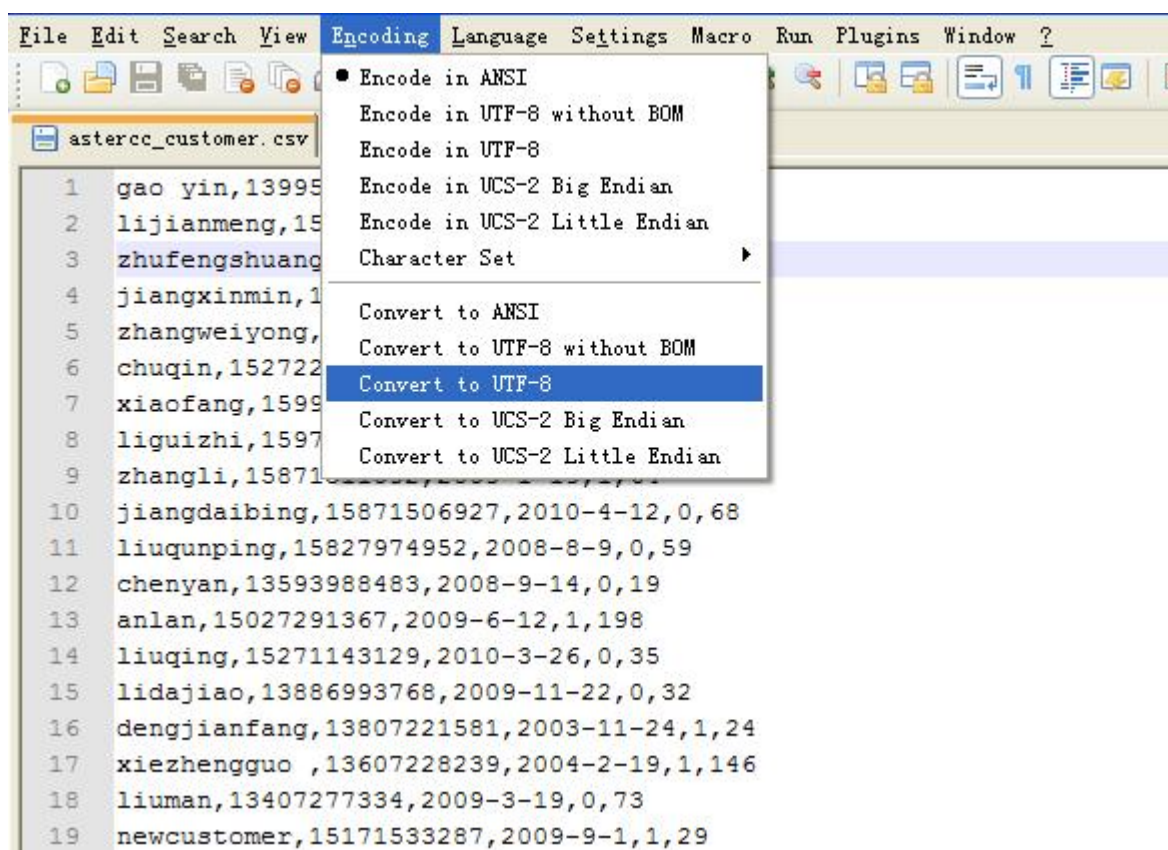


Choose the file to be imported, and the first 10 items will be shown.

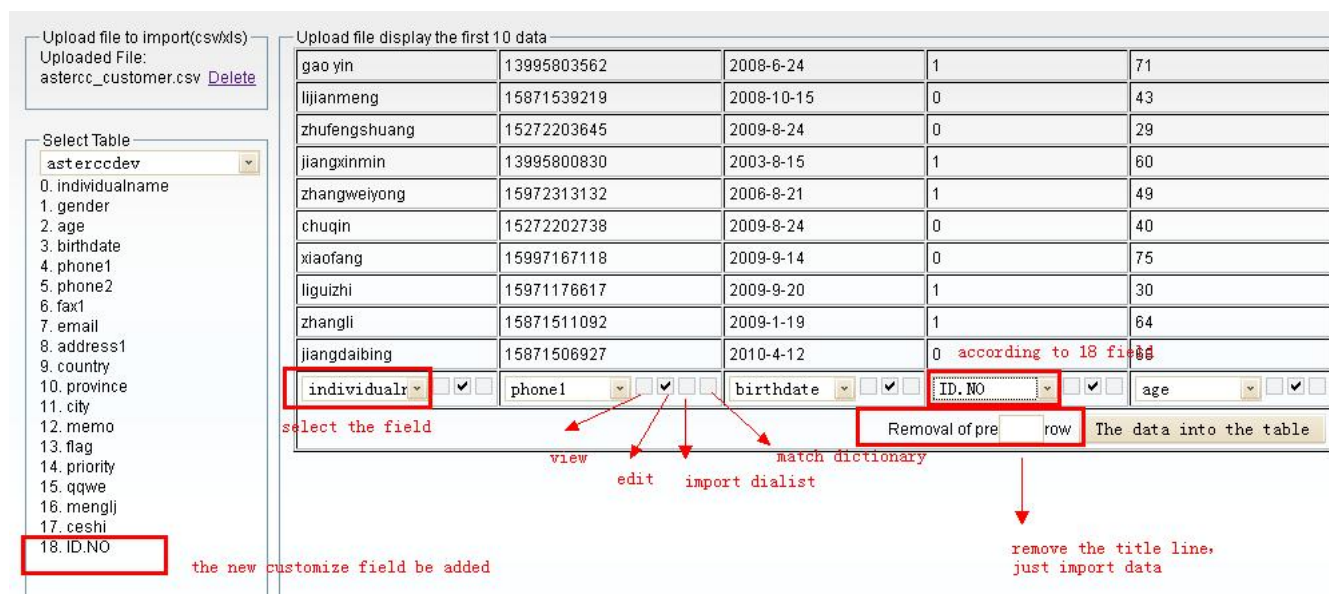
Before upload, you need to convert the format if the it is a csv file following these steps:

Open your file in Notepad++, do as the picture shows:





Choose the customer package in the pulldown menu, and all the field will be listed.



All fields are listed, including the newly added ones. In the dropdown menu under each column, you will find all the fields in the table that you have just selected. There are 3 boxes that you can tick. The first is for view only, the second one allows you to edit, and the third one represents a match dictionary. There is another box that means it will import the dialer list.

Import data matching

The function of the match dictionary



Every field is followed with a box, and you can choose whether to match this field to the dictionary, which equals to the system's matching function of the imported data. Tick the box if the field can be imported into the database only when it matches the dictionary.

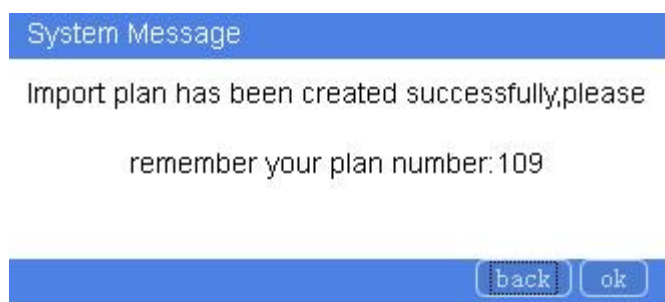
Unmatched cases happen when the words are not exactly the same as the default ones. For instance, in the gender field, there could be man and male, which will lead to an unmatched case, causing a data loss.



Before importing the data, you can choose to delete the first few lines. Generally, the first line, which usually is the title, is always deleted and will not be imported into the database. So we delete the first lines of titles and notes only to let the data being imported.

Import plans

Click the "The data into the table" button, you will be prompted the import is done and shown the plan number.



The data is being imported in the background.

You can check the shell import management. Under Callcenter Advanced, open Shell Imports.

Shell Import Management

Refresh Now

ShellImport ID	Target	Upload File	Status	Total	Success	Error	Success Rate	Created	Creby	Success Data	Error Data	Duplicate Data	Original Data	Delete
109	asterccdev	astercc_customer.csv	closed	19	19	0	100%	2012-03-26 16:44:56	admin	<div>Download</div>			<div>Download</div>	<div>Delete</div>
108	asterccdev	astercc_customer.csv	closed	19	19	0	100%	2012-03-22 10:04:22	admin	<div>Download</div>			<div>Download</div>	<div>Delete</div>

"Download" would appear when the data is imported. If you are notified a failure or a repeated download, you need to back to the campaign management of that customer package and check the information.

Field set

Open the campaign management of the customer package, double-click the item.

The screenshot displays the 'Campaign Management' interface. On the left, the 'editCampaign' form is shown with two tabs: 'Basic' and 'Advanced'. The 'Basic' tab is active, showing various campaign details. At the bottom of this form, there are two buttons: 'ManagementFieldSet' and 'InterfaceFieldSet'. A red circle highlights these buttons, and a red arrow points from the 'InterfaceFieldSet' button to the 'FieldSet' table on the right.

The 'FieldSet' table is titled 'EditField' and contains the following fields and options:

Field	View	Edit
FieldDisplay	<input type="checkbox"/>	<input type="checkbox"/>
individualname	<input type="checkbox"/>	<input checked="" type="checkbox"/>
engname	<input type="checkbox"/>	<input type="checkbox"/>
gender	<input type="checkbox"/>	<input type="checkbox"/>
age	<input type="checkbox"/>	<input type="checkbox"/>
birthdate	<input type="checkbox"/>	<input type="checkbox"/>
idcard	<input type="checkbox"/>	<input type="checkbox"/>
phone1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
phone2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
phone3	<input type="checkbox"/>	<input type="checkbox"/>
phone4	<input type="checkbox"/>	<input type="checkbox"/>
phone5	<input type="checkbox"/>	<input type="checkbox"/>
fax1	<input type="checkbox"/>	<input type="checkbox"/>
fax2	<input type="checkbox"/>	<input type="checkbox"/>
email	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the interface we can see two buttons of fieldset, in which we can set whether a specific piece of customer information can be viewed or edited. Interface field set is for agents. All the fields are not displayed in the agent interface by default. Here in [Interfacefieldset] you can set for agents, while [Managementfieldset] is for administrator's own use.

After setting, you may need to enter the Campaign Management of the customer package to see if the data have been imported successfully. They should all be in the list.

Campaign Customers:

Search

individualname: phone1: phone2:

address1: city: memo:

updated: created:

<input type="checkbox"/>	individualname	phone1	memo	Updated
<input type="checkbox"/>	newcustomer	15171533287		2012-03-26 18:45:02
<input type="checkbox"/>	liuman	13407277334		2012-03-26 18:45:02
<input type="checkbox"/>	xiezhengguo	13607228239		2012-03-26 18:45:02
<input type="checkbox"/>	dengjianfang	13807221581		2012-03-26 18:45:02
<input type="checkbox"/>	lidajiao	13886993768		2012-03-26 18:45:02
<input type="checkbox"/>	liuqing	15271143129		2012-03-26 18:45:02
<input type="checkbox"/>	anlan	15027291367		2012-03-26 18:45:02
<input type="checkbox"/>	chenyan	13593988483		2012-03-26 18:45:02
<input type="checkbox"/>	liuqunping	15827974952		2012-03-26 18:45:02
<input type="checkbox"/>	jiangdaibing	15871506927		2012-03-26 18:45:02

26.11 How To Verify Validity Of Credit Card In IVR Module



Purpose: implement the function of IVR to verify validity of credit card, including validity of card's digit and date. It can return a value after judging by a program(http/webservice), the value is valid or invalid.

1. Add Announcements

As an example to "Welcome", other IVR announcements could be added in the same way.

[Advanced] → [Announcements], click the [Add], make a name and click [Save], then [Add/Edit Sound] → [TTS], as following:

System

User

PBX

Advanced

Queues

Worktimes

Worktime Packages

Trunk Groups

Templates

Inbound Routes

Outbound Routes

Blacklists

Whitelists

CID Restricts

Conferences

Meetmes

MOHs

Announcements

IVR

Add Sounds

Applications

DAHDI

Announcements:

Search

Announcement Management

Edit Announcement Language 简体中文

Basic

Name*: Description:

Team:

Add Sound

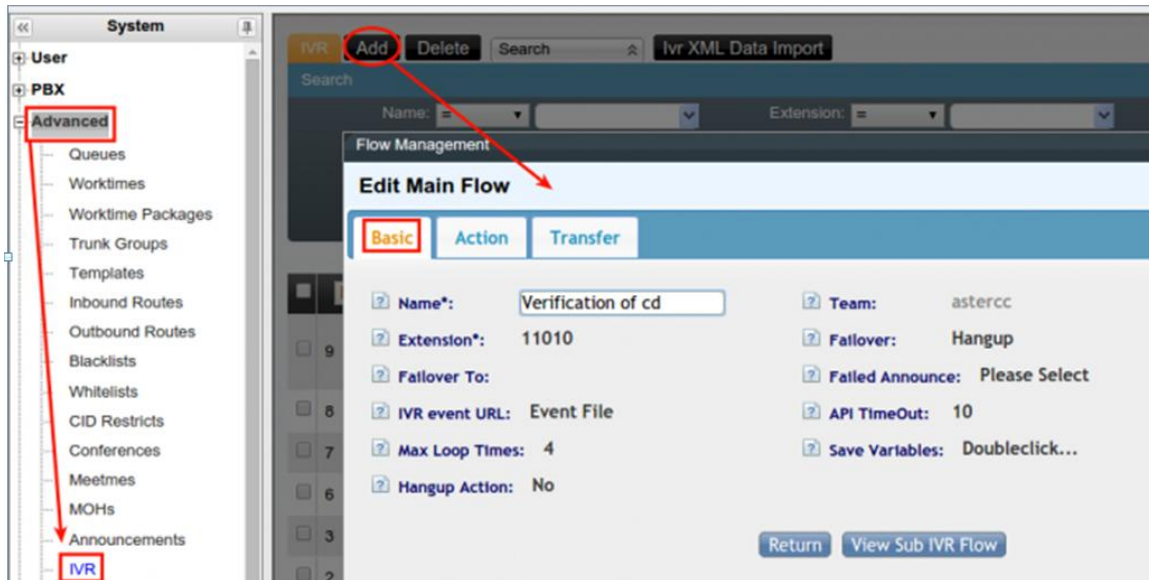
Add Sound

TTS Language Code Merge Announce

Language	Filename	Delete
English	<input type="button" value="Click to Upload"/> Hello , welcome to the credit card center,please input your card number,and end by #,	<input type="button" value="Delete"/>

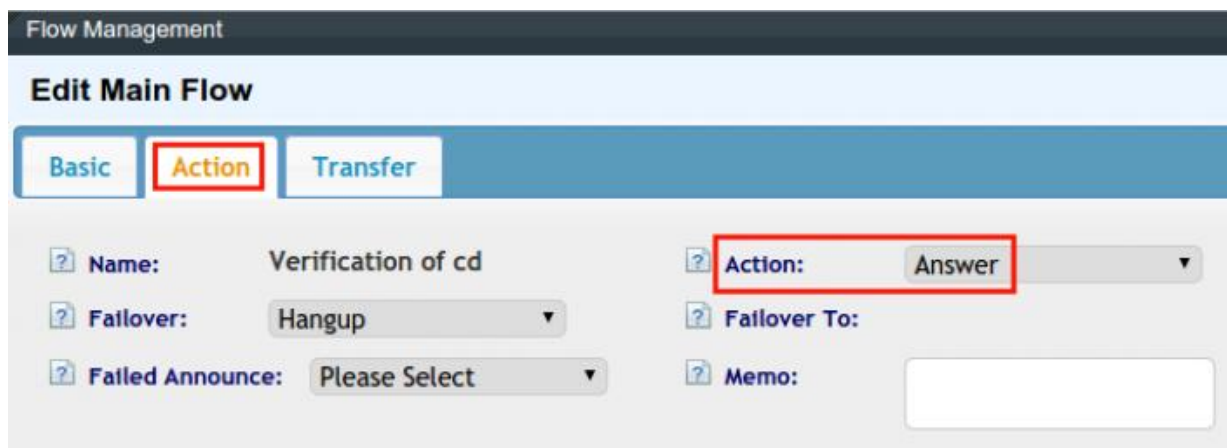
2.Add Main IVR Flow

The main Flow used to Verify the credit number. Click[Advanced]→[IVR]→[Add], you can new a page of main flow, as following:



2.1 Action

1).Add the "Answer" action.



2).Add the "ReadData" action, you can hear "Hello, welcome to the credit card center,please input your card number,and end by # ", and then put the card number into the variable quantity named"CARDNO".

Flow Management

Edit Main Flow

Basic **Action** Transfer

? Name: Verification of cd ? Action: ReadData

? Announcement Type: System ? Announcement *: cd_welcome

? Loop Times: 3 ? Save Variables: CARDNO

? Digits Restrict: 16 16 ? Time Out: 5

? TimeOut Announce: cd_out of date ? Timeout Replay Menu: Yes

? Error Input Announce: cd_cardNo/date incor ? ErrorInput Replay Menu: Yes

? Check Transfrom: No ? Fallover: Hangup

? Fallover To: ? Failed Announce: Please Select

? Memo:

3).Add the "Play Announce" action, you can hear "The number you input is: ", loop time is 1.

Flow Management

Edit Main Flow

Basic **Action** Transfer

? Name: Verification of cd ? Action: Play Announce

? Announcement Type: System ? Announcement *: cd_The number you ii

? Loop Times: 1 ? Fallover: Hangup

? Fallover To: ? Failed Announce: Please Select

? Memo:

4).Add the "Saydigits" action , you can hear the number stored in variable quantity named"CARDNO". Distinguish the difference between "Saydigits" and "Saynumber".

Flow Management

Edit Main Flow

Basic **Action** Transfer

Name: Verification of cd

Content *: CARDNO

Fallover To:

Memo:

Action: Saydigits

Fallover: Hangup

Failed Announce: Please Select

5).Add the "ReadData" action, you can hear "Press 1 mean confirming, else press 2", and store the press number into the variable quantity named "OK1".

Flow Management

Edit Main Flow

Basic **Action** Transfer

Name: Verification of cd

Announcement Type: System

Loop Times: 2

Digits Restrict: 1 1

TimeOut Announce: Please Select

Error Input Announce: Please Select

Check Transfrom: Yes

Fallover To:

Memo:

Action: ReadData

Announcement *: cd_confirm or cancel

Save Variables: OK1

Time Out: 3

Timeout Replay Menu: Yes

ErrorInput Replay Menu: Yes

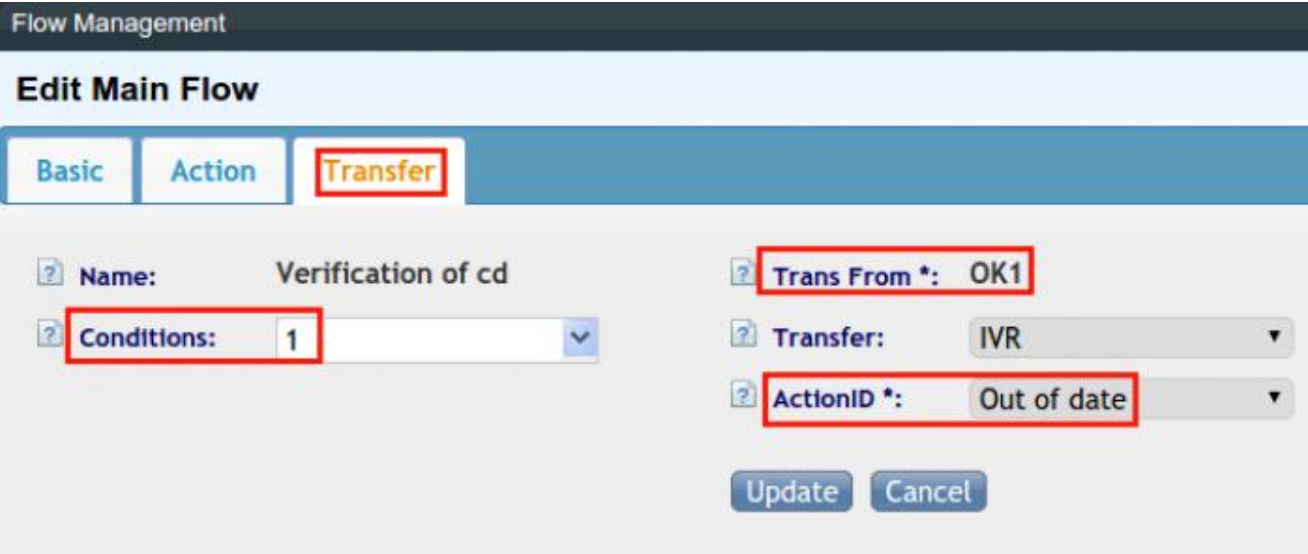
Fallover: Hangup

Failed Announce: Please Select

2.2 Transfer

On the main flow above, the last action can be get a value, and put it into the variable quantity named "OK1".

When the value is "1", transfer to the "first sub IVR flow", enter the IVR named "Out of date" to verify validity of card date.



Flow Management

Edit Main Flow

Basic Action **Transfer**

Name: Verification of cd

Conditions: 1

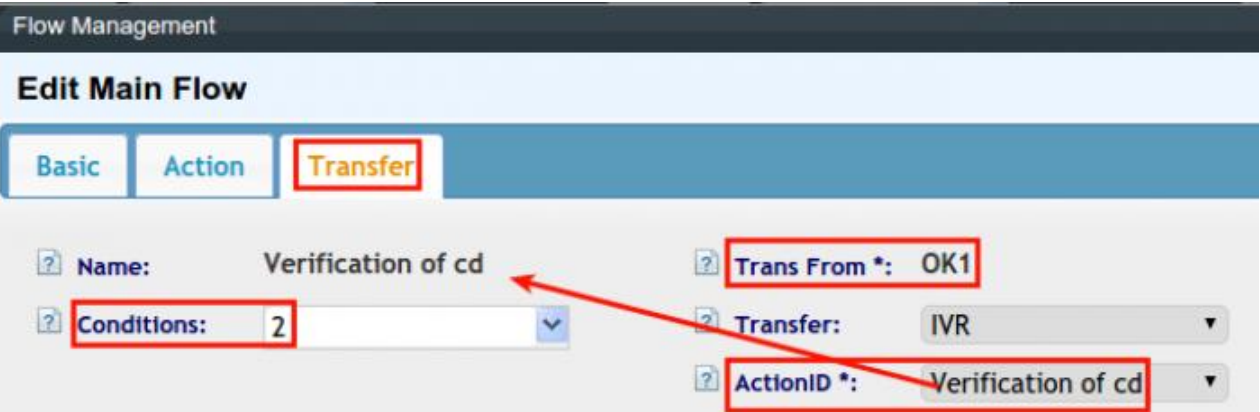
Trans From *: OK1

Transfer: IVR

ActionID *: Out of date

Update Cancel

When the value is "2", return to this "Main IVR Flow", enter the IVR named "Verification of cd" to obtain the card number.



Flow Management

Edit Main Flow

Basic Action **Transfer**

Name: Verification of cd

Conditions: 2

Trans From *: OK1

Transfer: IVR

ActionID *: Verification of cd

3 .Add the "First Sub IVR Flow"

This sub flow used to judge validity date of the card. To [Transfer] label, "Transfer" to IVR, click "OK" on the right of ActionID, Click [Save], we will turn to sub IVR adding/editing page automatically, as following:

Flow Management

Edit Main Flow

Basic Action **Transfer**

? Name: Verification of cd

? Conditions: 1

? Trans From *: OK1

? Transfer: IVR

? ActionID *: Create

OK

when edit it again, you can Click[Advanced]→[IVR], double click the main IVR flow, then click [View Sub IVR Flow], as following:

System

PBX

Advanced

Queues

Worktimes

Worktime Packages

Trunk Groups

Templates

Inbound Routes

Outbound Routes

Blacklists

Whitelists

CID Restricts

Conferences

Meetmes

MOHs

Announcements

IVR

Add Sounds

Applications

DAHDI

BLF Group

Record App

Record View

Fax

Rate

IVR Add Delete Search Iv XML Data Import

Name: Extension: Creby: Updated: Start Time End Time

Reset Search Export xls file

Name	Extension	Team
Verification of cd	11010	astercc

Flow Management

Edit Main Flow

Basic Action **Transfer**

? Name*: Verificati...

? Extension*: 11010

? Team: astercc

? Faller: Hangup

? Faller To:

? IVR event URL: Event File

? Max Loop Times: 4

? Hangup Action: No

? Failed Announce: Please Select

? API TimeOut: 10

? Save Variables: Doubleclick...

Return View Sub IVR Flow

3.1 Action

1).Add the "ReadData" action. you can hear "Please input valid date of the card: for example, October of 2015, you should press 1 5 1 0", then put the date value to "DATENO".

Sub IVR Flows Add Delete Search Main IVR Name : Verification of cd

Search

Flow Management

Edit Sub Flow

Basic Action Transfer

Name: Out of date Action: ReadData

Announcement Type: System Announcement *: cd_input the valid da

Loop Times: 2 Save Variables: DATENO

Digits Restrict: 4 4 Time Out: 5

TimeOut Announce: cd_out of date Timeout Replay Menu: Yes

Error Input Announce: cd_cardNo/date incor ErrorInput Replay Menu: Yes

Check Transform: No Failover: Hangup

Failover To: Failed Announce: Please Select

Memo:

2).Add the “Play Announce” action. you can hear “the valid date of card you input is: ”, loop time is 1.

Flow Management

Edit Sub Flow

Basic Action Transfer

Name: Out of date Action: Play Announce

Announcement Type: System Announcement *: cd_the date you input

Loop Times: 1 Failover: Hangup

Failover To: Failed Announce: Please Select

Memo:

3).Add the “Saydigits” action, you can hear the date stored in the variable quantity named “DATENO”.

Flow Management

Edit Sub Flow

Basic Action Transfer

Name: Out of date

Action: Saydigits

Content *: DATENO

Fallover: Hangup

Fallover To:

Failed Announce: Please Select

Memo:

4).Add the "ReadData" action, you can hear "Press 1 mean confirming, else press 2", and store the press number into the variable quantity named "OK2".

Flow Management

Edit Sub Flow

Basic Action Transfer

Name: Out of date

Action: ReadData

Announcement Type: System

Announcement *: cd_confirm or cancel

Loop Times: 2

Save Variables: OK2

Digits Restrict: 1 1

Time Out: 3

TimeOut Announce: Please Select

Timeout Replay Menu: Yes

Error Input Announce: Please Select

ErrorInput Replay Menu: Yes

Check Transfrom: Yes

Fallover: Hangup

Fallover To:

Failed Announce: Please Select

Memo:

3.2 Transfer

The last action in the main IVR flow is "ReadData", the data obtained be stored into the variable quantity named "OK2".

When the value of "OK2" is "1", transfer to the "second sub IVR flow", enter the IVR named "the IVR__http" to pass two values of card to HTTP/Webservice.

Flow Management

Edit Sub Flow

Basic Action **Transfer**

? Name: Out of date

? Conditions: 1

? Trans From *: OK2

? Transfer: IVR

? ActionID *: the IVR_http

When the value of "OK2" is "2", return to this "Sub IVR Flow", enter the IVR named "Out of date" to obtain the valid date of the card.

Flow Management

Edit Sub Flow

Basic Action **Transfer**

? Name: Out of date

? Conditions: 2

? Trans From *: OK2

? Transfer: IVR

? ActionID *: Out of date

4.Add the "Second Sub IVR Flow"

The purpose of this IVR flow is obtain the return values from HTTP/Webservice, and then put the values into the global variability named "R1" (R1 can be calling in all IVR). At the same time, HTTP/Webservice also return a default value to "inputcode".

4.1Action

Add the "HTTP" action, pass two values into two parameters of HTTP/Webservice, return a values into the global variability named "R1".

Flow Management

Edit Sub Flow

Basic **Action** Transfer

? Name: the IVR__http

? HTTP Address * http://127.0.0.1/creditc:

? HTTP Return R1

? Fallover: Hangup

? Failed Announce: Please Select

? Action: HTTP

? HTTP Param cardno=CARDNO|validdat

? Globalvar: R1

? Fallover To:

? Memo:

Notice:



1.The format of "HTTP Param": inputcode|cardno=CARDNO|validdate=DATENO. (cardno and validdate are parameters from HTTP/Webservice. CARDNO and DATENO are number and date of card respectively from IVR. The head of them is "inputcode" default, so we don't write it usually. Two variabilities should be separated by "|". So, we fill here as following : cardno=CARDNO|validdate=DATENO.

2.The format of "HTTP Return": inputcode|return value. The head is "inputcode" default, so we don't write it usually. The value of return obtain from HTTP program. If return several return values, we need separate them by "|".

3.If you set the return value from HTTP to be global variabilities, you should definite it by capital letters. The global variabilities of "Globalvar" should be same as "HTTP Return" exactly.

4.2 Transfer

When the value of "inputcode" is "1", transfer to the "third sub IVR flow", enter the IVR named "cd_Overage" to broadcast "The overage of your credit card is:".

Flow Management

Edit Sub Flow

Basic Action **Transfer**

? Name: the IVR__http

? Conditions: 1

? Trans From *: Inputcode

? Transfer: IVR

? ActionID *: cd_Overage

When the value of "inputcode" is "0", transfer to the "fourth sub IVR flow", you can hear "The card number you entered does not exist, press * if you want to re-enter".

Flow Management

Edit Sub Flow

Basic Action **Transfer**

? Name: the IVR__http

? Conditions: 0

? Trans From *: Inputcode

? Transfer: IVR

? ActionID *: cd_NoExist

5.Add the "Third Sub IVR Flow"

If the number and date of card are correct, you can hear the overage. You should press 0 if you want to listen again.

5.1Action

1).Add "Play Announce" action, you can hear "The overage of your credit card is:".

Flow Management

Edit Sub Flow

Basic **Action** Transfer

? Name: cd_Overage

? Announcement Type: System

? Loop Times: 1

? Fallover To:

? Memo:

? Action: Play Announce

? Announcement *: cd_your overage is

? Fallover: Hangup

? Failed Announce: Please Select

2).Add "Sayamount" action. Broadcasting the return value which have been stored in the global variability named "R1" from HTTP.

Flow Management

Edit Sub Flow

Basic **Action** Transfer

? Name: cd_Overage

? Content *: R1

? Fallover To:

? Memo:

? Action: Sayamount

? Fallover: Hangup

? Failed Announce: Please Select

3).Add "ReadData" action. You can hear "You should press 0 if you want to listen again".

Flow Management

Edit Sub Flow

Basic **Action** Transfer

? Name: cd_Overage

? Announcement Type: System

? Loop Times: 2

? Digits Restrict: 1 1

? TimeOut Announce: Please Select

? ErrorInput Replay Menu: Yes

? Fallover: Hangup

? Failed Announce: Please Select

? Action: ReadData

? Announcement *: cd_You should press 0

? Save Variables:

? Time Out: 3

? Timeout Replay Menu: Yes

? Error Input Announce: Please Select

? Check Transfrom: Yes

? Fallover To:

? Memo:

5.2 Transfer

When inputcode is 0 in the above "ReadData" action from the third Sub IVR Flow, it will transfer to IVR named "cd_Overage".

Flow Management

Edit Sub Flow

Basic Action **Transfer**

? Name: cd_Overage

? Conditions: 0

? Trans From *: Inputcode

? Transfer: IVR

? ActionID *: cd_Overage

6.Add the "Fourth Sub IVR Flow"

In the transfer of "the Second Sub IVR Flow", When the "inputcode" is 0, it will turn to this flow.

6.1 Action

Add "ReadData" action, you can hear "The card number you entered does not exist, press * if you want to re-enter".

Flow Management

Edit Sub Flow

Basic **Action** Transfer

? Name: cd_NoExist

? Announcement Type: System

? Loop Times: 2

? Digits Restrict: 1 1

? TimeOut Announce: Please Select

? ErrorInput Replay Menu: Yes

? Failover: Hangup

? Failed Announce: Please Select

? Action: ReadData

? Announcement *: cd_The card number

? Save Variables:

? Time Out: 3

? Timeout Replay Menu: Yes

? Error Input Announce: Please Select

? Check Transfrom: Yes

? Failover To:

? Memo:

6.2 Transfer

When "inputcode" get * in above "ReadData" action, it will turn to the most beginning-"Main IVR Flow" named "Verification of cd".

Flow Management

Edit Sub Flow

Basic Action **Transfer**

? Name: cd_NoExist

? Conditions: *

? Trans From *: Inputcode

? Transfer: IVR

? ActionID *: Verification of cd

26.12 How to build a voice broadcasting to IVR system

By combining marketing campaign, IVR and dialer functions, it is possible to create a great broadcasting system with astercc. This system configured as per the instructions below, will be able to place calls according to certain conditions. The way this works is that when the call is connected, the system transfers the call to an IVR where the customer will be listening to a recording and pressing buttons to move through a menu. Users of astercc can configure and use this feature free of charge provided it is done on a reasonable scale in relation to astercc predial offers.

Below, we will guide you in the design of a voice broadcasting system using transfers to queues. By following these instructions, you will also learn how to:

1. Build important parts of a telephone system
2. Set an IVR
3. Configure a campaign
4. Use the predictive dialer
5. Use the agent interface

1.Trunk

You need a trunk for outbound calls in the first place.

Get the following resources according to different types of trunks:

- Network trunk– asterCC supports trunks with SIP and IAX2 protocol. We do not need extra facilities when using such trunk. Different ITSP have different connection way. For instance, most would offer user name, password and server address for connection.
- E1 – we need a E1 voice card and audio gateway (AG) with SIP protocol for transferring E1 calls into SIP calls.
- Analog trunk– we do not recommend analog trunks for outbound system, since most analog trunks do not have reverse polarity signals, thus, the system cannot recognise user status, which means, when the calls are not answered or the numbers do not exist, the system would think there is an answer signal and would transfer the call to IVR. Therefore, we do not recommend an analog trunk in this condition. To build an analog trunk, we need an analog voice card (FXO interface) or an audio gateway (AG) of the analog trunk.

Quickly Setup Extension and Agent

We need at least one account to bill the campaign, and two or more extensions to test the trunk. We also need to take into account the agents which may be used someday.

- Please refer to: [quick setup, quick add extensions and agents in bulk](#)
- Considering the system offers 5 agents' license, we now build 5 accounts, and each account has an extension and an agent.



We can add accounts and extensions in bulk regardless of agents

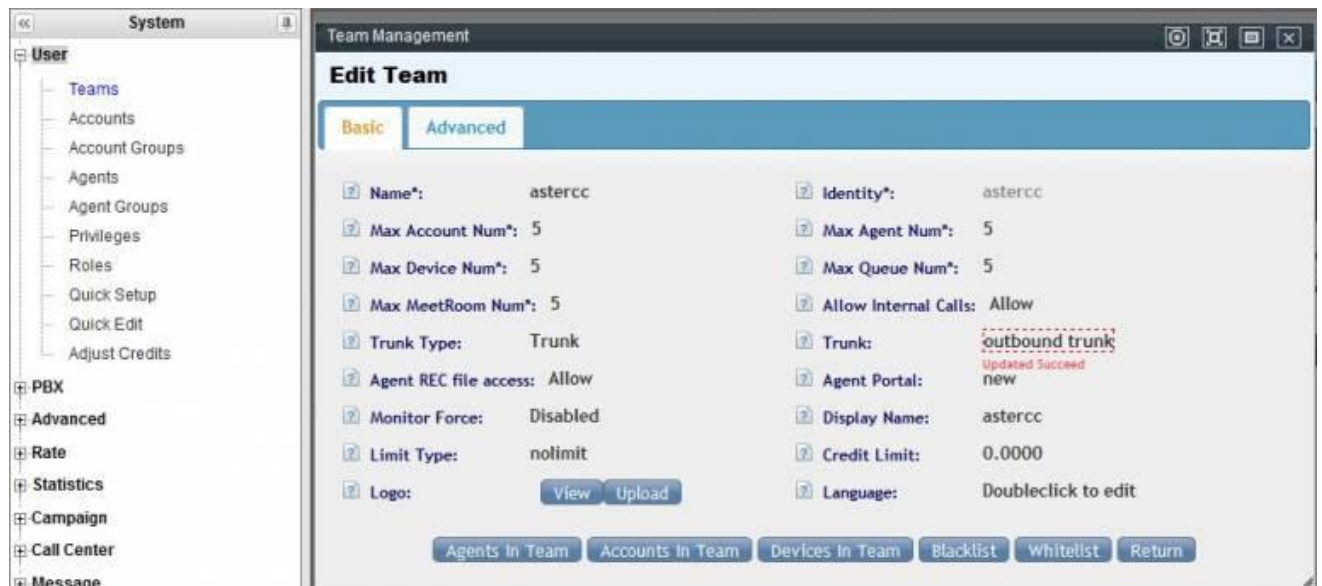
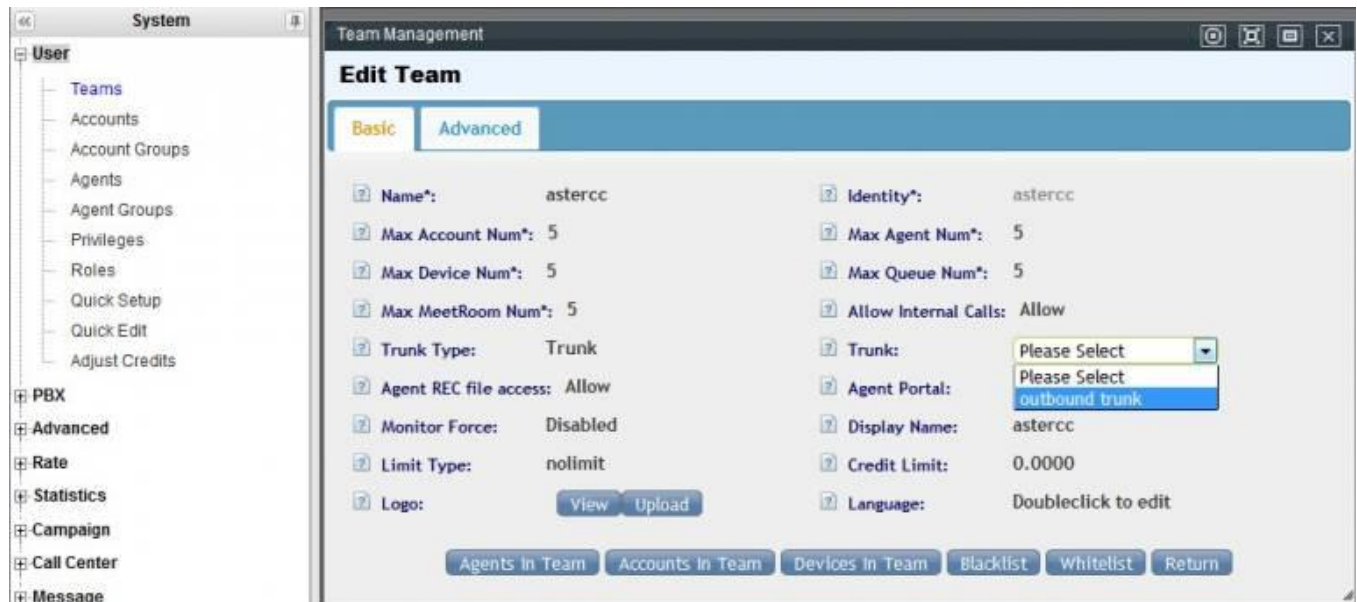
2.Adding Trunk

- Please refer to: [Adding Trunk, configuring a trunks](#), and build a trunk for campaign.

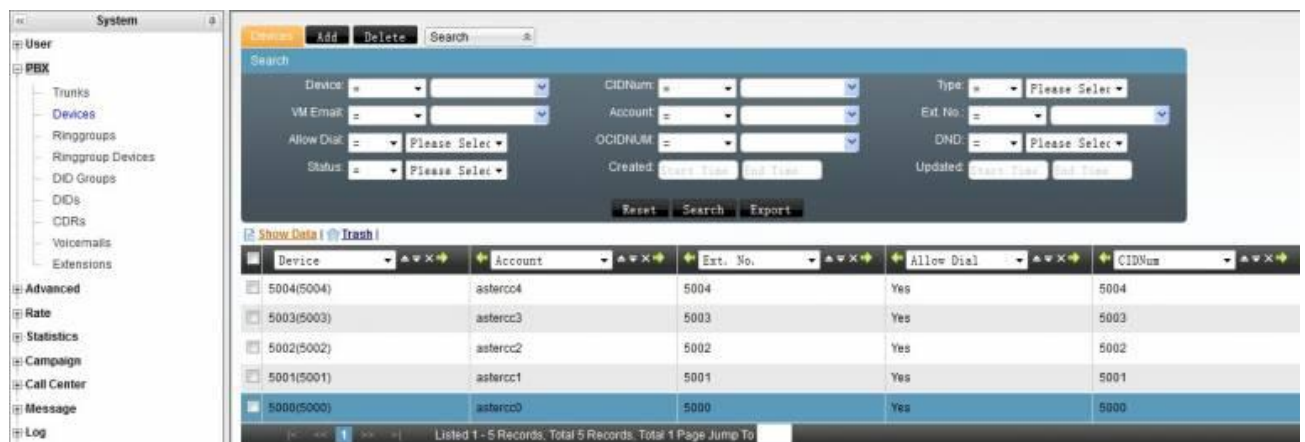
3.Outbound Testing

Now we can test if the extension of the team can call

- Assign the trunk to the team, and make all calls placed by this team go through this trunk



- In the menu on the left, PBX→Devices, choose an unused extension and double-click it to check its login name and password

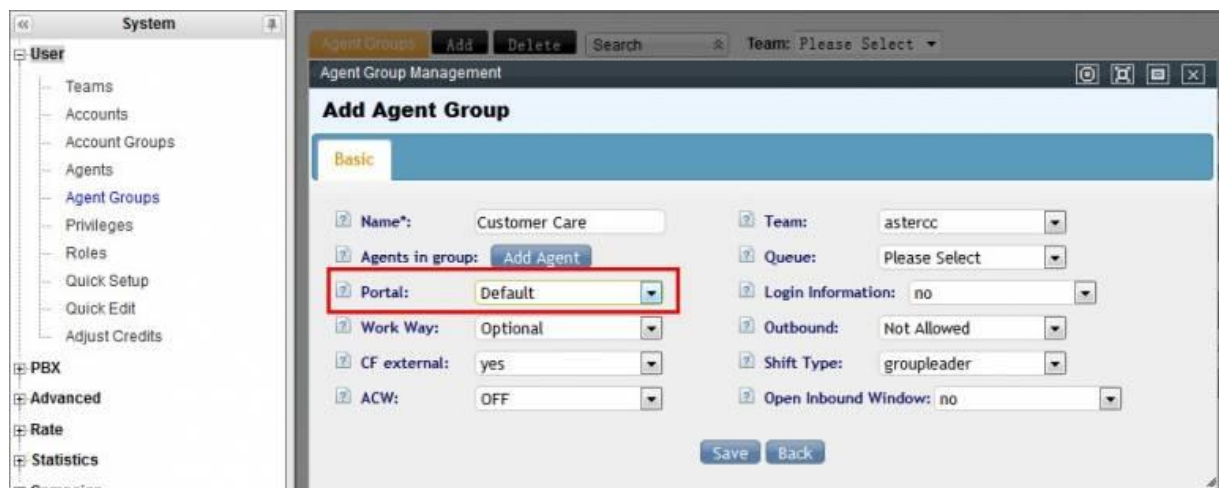


- Register a softphone
- Try to make calls. If there is a problem, review the settings of the trunk.

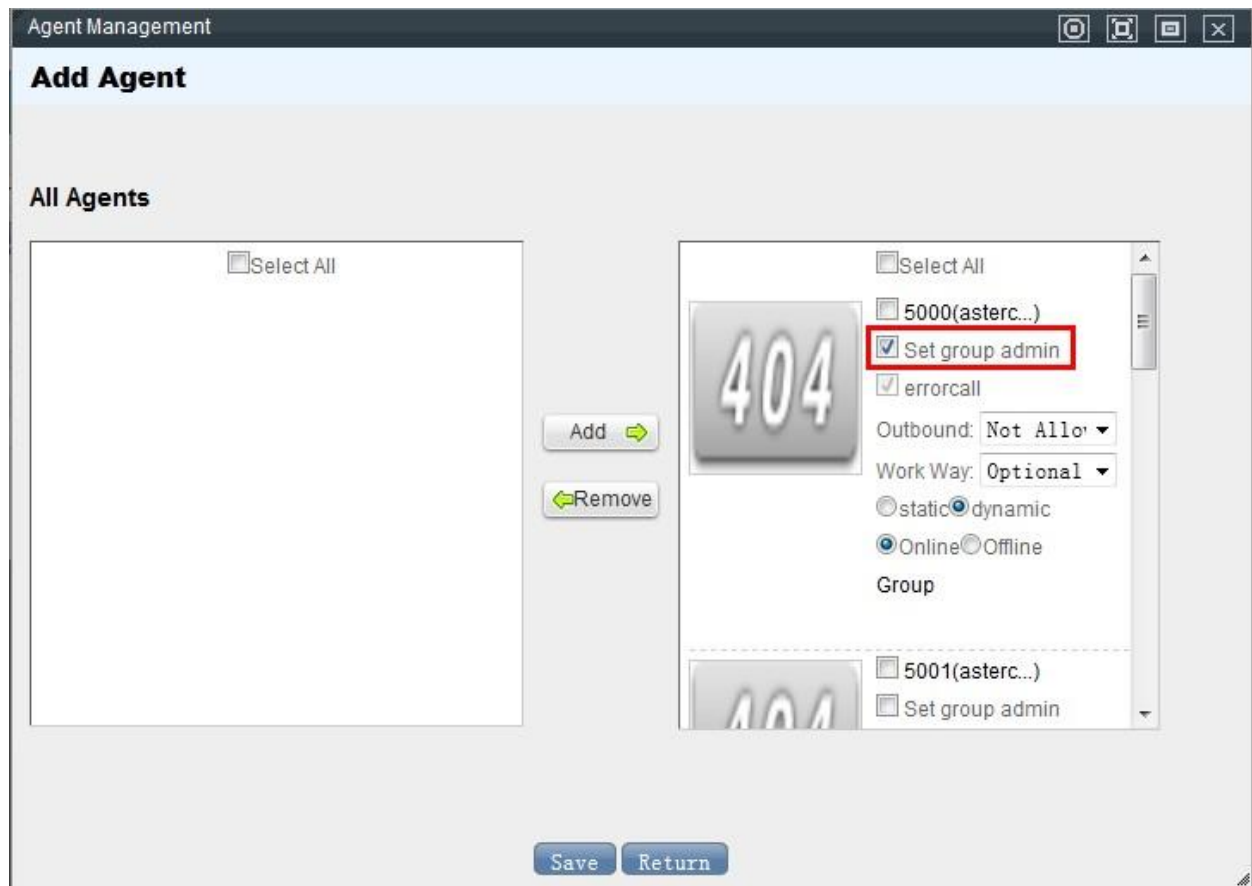
3.Creating an Agent Group

To put in place a better service, you will need to build an agent group to answer the customers who need operator services.

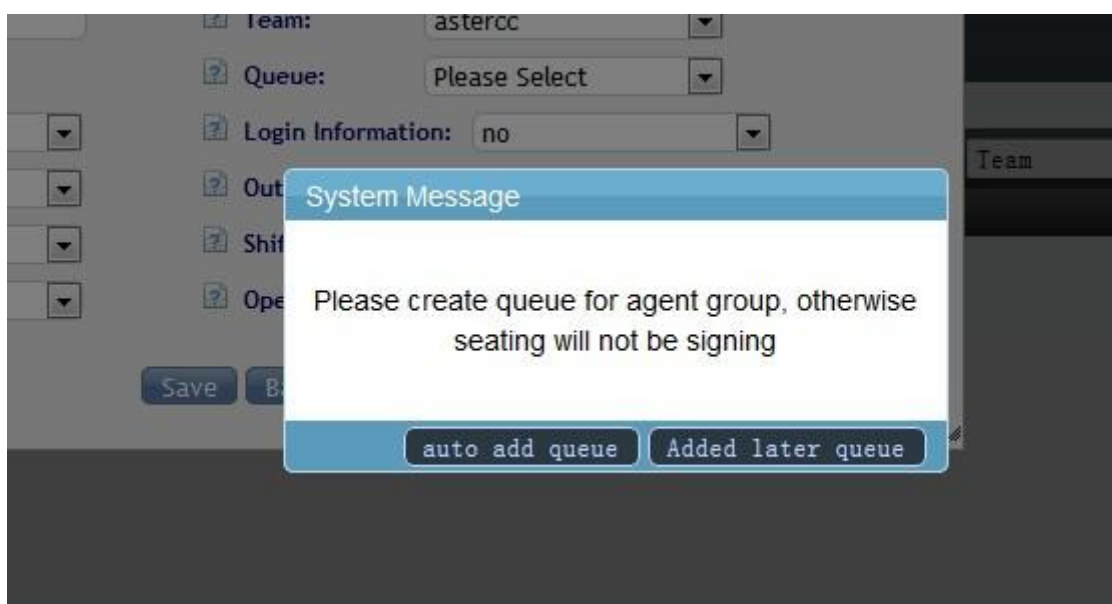
- In the menu on the left, choose User→Agent Groups,and *Add* agent group.
- Portal: When agents login the agent interface, the system will open a page by default. Here we choose *default*.



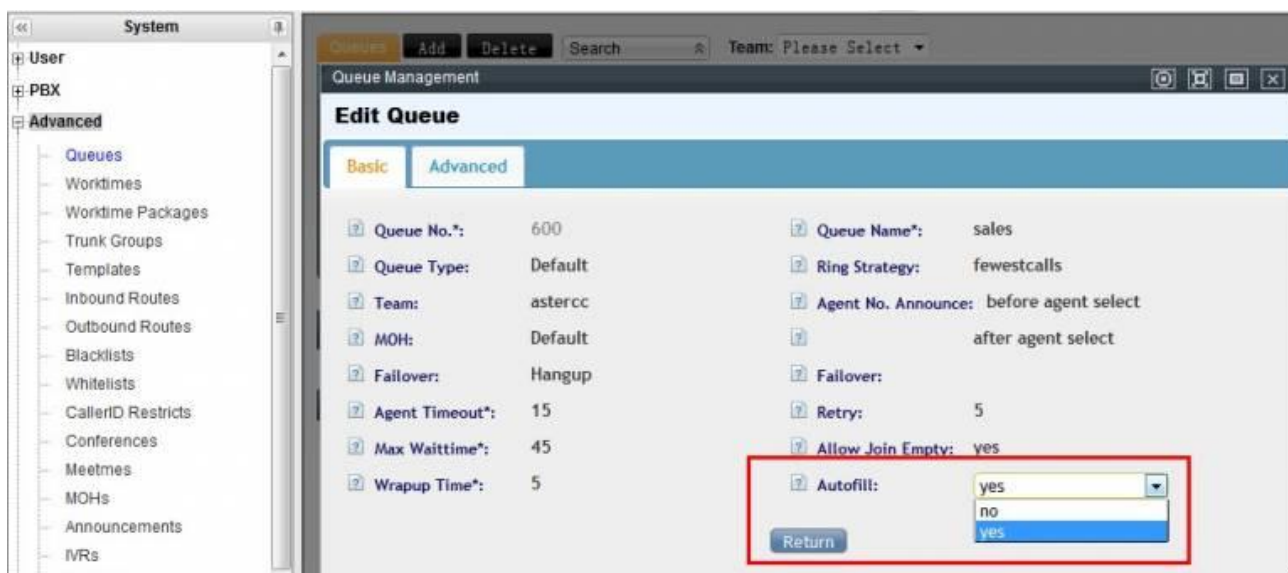
- Click [Add Agent], and select the agents into the group, then save.
 - Here we assign agent number 5000 the monitor of the group.



- Each group needs a queue. If the system cannot find one when you save, there will be a pop-up asking if a queue is to be created. Choose "auto add queue".



- In the menu on the left, Advanced→Queue: In the Queue management page we can see the queue that was automatically added. Double-click to modify it.
 - For a queue which that needs to play an agent number to the caller, you can config "Agent No. Announce". Select two files for the voice between Agent No. and one for the voice after Agent No. By default asterCC provides "play_agentno_en1"(Agent) and "play_agentno_en2"(is at your service)
 - Please select Autofill so the agents can answer calls as soon as they are connected.



4.Add an IVR

Please refer to [configuring a simple ivr](#)

5.Add Campaign

- Campaign→ Campaigns→ Campaign management
- Add a campaign, Dialer Status-Enable, Campaign URL: IVR ... Broadcasting IVR
 - Event URL- Event file
 - In pre-dialer, we don't assign customers to agents, so we need to choose *no* after *check reassign*.

System

Campaign Management

Add Campaign

Basic Advanced

Campaign *: Broadcasting IVR

Priority: Common

Customer Package:

Bind Survey: Select Options

Each Fetch: 10

Team: astercc

Dialer Status: Enable

Dial-in Exten.*: Current AgentGroup

Campaign URL *: Current AgentGroup

check reassign: rate for agent

Call Hint: Yes

Status: Enable

Customer Package: individual

Worktime: Any Time

Agent Obtain: No

Agent Max. Own: 0

Agent Group*: Customer Care

Dialer Account: astercc0

Event URL: eventfile

Allow Add New: Yes

Autoidel: Yes

Save Back

System

Campaign Management

Edit Campaign

Basic Advanced

Campaign *: broadcasting IVR

Priority: Common

Customer Package: broadcasting IVR

Bind Survey: Doubleclick to edit

Each Fetch: 10

Team: astercc

Dialer Status: Enable

Dial-in Exten.*: Current AgentGroup

Campaign URL *: dialoutinterfac...

check reassign: No

Call Hint: Yes

Status: Enable

Customer Package: individual

Worktime: Any Time

Agent Obtain: No

Agent Max. Own: 0

Agent Group*: Customer Care

Dialer Account: Doubleclick to edit

Event URL: eventfile

Allow Add New: Yes

Autoidel: Yes

ManagementFieldSet InterfaceFieldSet Auto-distribution plan Manual of the distribution plan Return



Choose agent group in Dial-In-Exten, when you want to transfer the calls to the assigned agent group.

- After adding a campaign, the system automatically creates a customer package. To see it, go in the left menu and click Campaign→ Customer Packages

System

- User
- PBX
- Advanced
- Rate
- Statistics
- Campaign**
 - Campaigns
 - Blacklists
 - Customization
 - Individuals
 - Enterprises
 - Customer Packages**
 - Results
 - Campaign Cdrs
 - Quality Control
 - QC Scores
 - Statistics
 - Customers

Customer Packages Add Delete Search

Edit Customerpackage

Basic

Title *:	broadcasting IV...	Status:	inuse
Tabletype:	individual	Creby:	Doubleclick to ...
Total:	0	Process:	0
Uniquekey Field:		Dup_field:	phone1,phone2,
Tablename:	cc10_2_individualpackages	Campaign:	broadcasting IV...
Team:	astercc	Memo:	Doubleclick to ...

Edit Customer IN CustomerPage Export Customers Return

6.Config Dict

To unify the data format, the system supports dictionary matching. Here we take gender as an example to show you how to match the dictionary.

- In the menu on the left, Call center→ Import dict, and *Add* male and female

System

- User
- PBX
- Advanced
- Rate
- Statistics
- Campaign
- Call Center**
 - Bind Num. to Apps
 - Import
 - Shell Import Jobs
 - Import Dict**
 - Shell Exports

Import Dict Add Delete Search

Search

Key: Value: Re

Show Data | Trash |

	Key	Value	Created
<input type="checkbox"/>	female	girl	2012-06-26 09:54:13
<input type="checkbox"/>	male	boy	2012-06-26 09:53:58
<input type="checkbox"/>	male	Mr.	2012-06-26 09:53:50
<input type="checkbox"/>	female	Ms.	2012-06-26 09:53:41

Listed 1 - 4 Records, Total 4 Records, Total 1 Page Jump To

7.Import

- Call Center→ Import

- Select the files to be imported
- Select *broadcasting IVR* that we just built in the pull-down menu
 - Choose which field to import under each line of data
 - The first 2 boxes are whether to allow agents to view, or whether to allow agents to edit. The third box is whether to match dictionary. In the field just below the boxes, select "Pre dialing phone field" for the column containing the numbers that need to be dialed.
 - There is an option to "remove first rows" so we can skip the title line(s)
 - Please ignore the mismatching warning
 - If you are using csv and see "Failure", please make sure the format of the file is UTF-8

Please select the file to import (csv/xls)
 Uploaded File: test.csv [Delete](#)

Select the table you want to import

Sales

0. individualname
 1. gender
 2. age
 3. birthdate
 4. phone1

Here displays the first 10 records of the file 【Server Time: 2012-07-06 02:50:19】

Name	Gender	Number	Email	Address
John	boy	13609188512	solo@astercc.org	Germany
Lisa	girl	13640005007	solo@astercc.org	U.S.A
Mike	male	18092575863	solo@astercc.org	Germany

individual: ☐ ☒ ☒
 gender: ☐ ☒ ☒
 phone1: ☐ ☒ ☒
 email: ☐ ☒ ☒
 address1: ☐ ☒ ☒

-Dialer Setting- -Dialer Setting- Pre dialing phone field -Dialer Setting- -Dialer Setting-

Please select when to import (leave it blank if you want to do it now): 2012-07-08 20:1

Remove the first 1 row when import

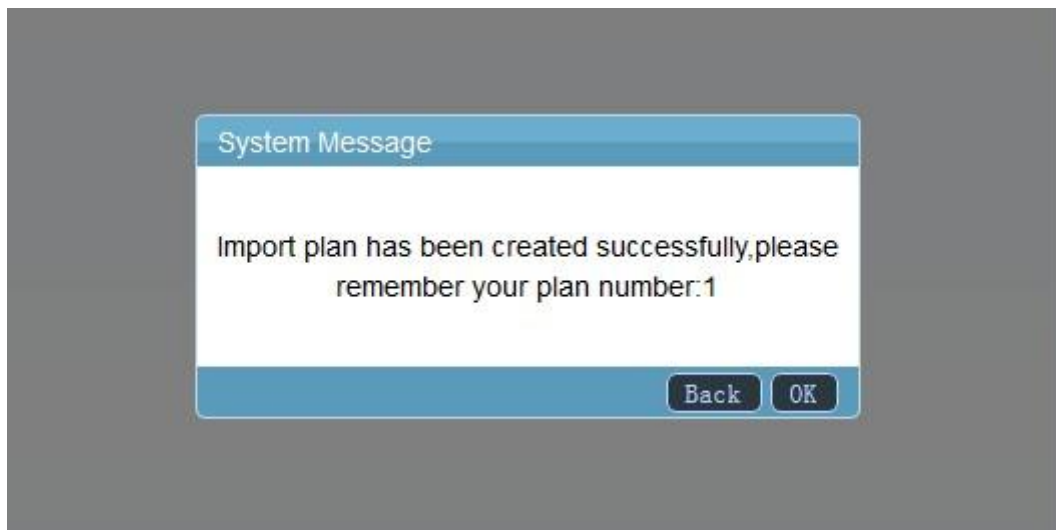
Please select when to import (leave it blank if you want to do it now): 2012-06-26 22:2

Remove the first

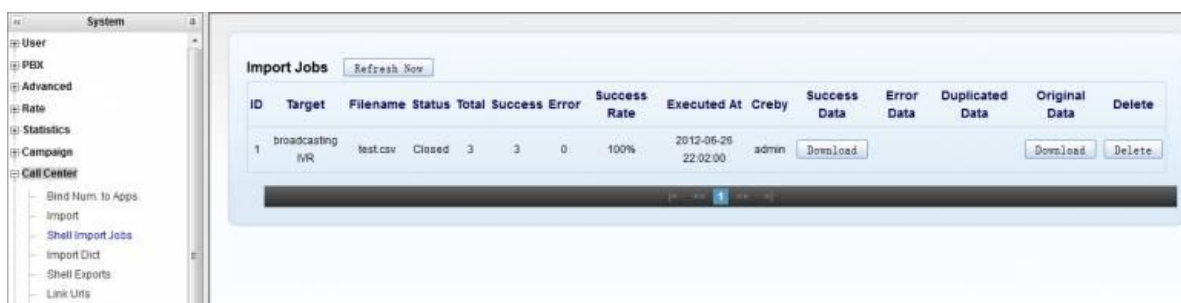
System Message

The file you want to import do not have same name as the package, click OK to continue?

[Back](#)
[OK](#)

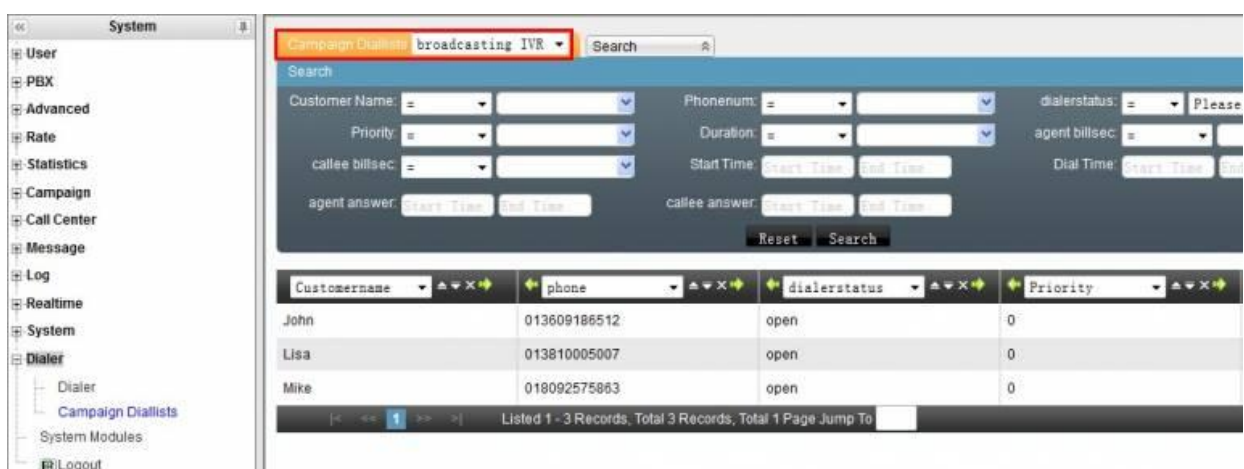


- Go in Call Center→ Shell Import Jobs to see the job you just have just done
 - This is usually finished in two minutes. You can hit refresh in your navigation bar if you want.



8. Predictive Dialer

- Go in Dialer→ Campaign Diallist. Here you can see the numbers that are to be dialed.

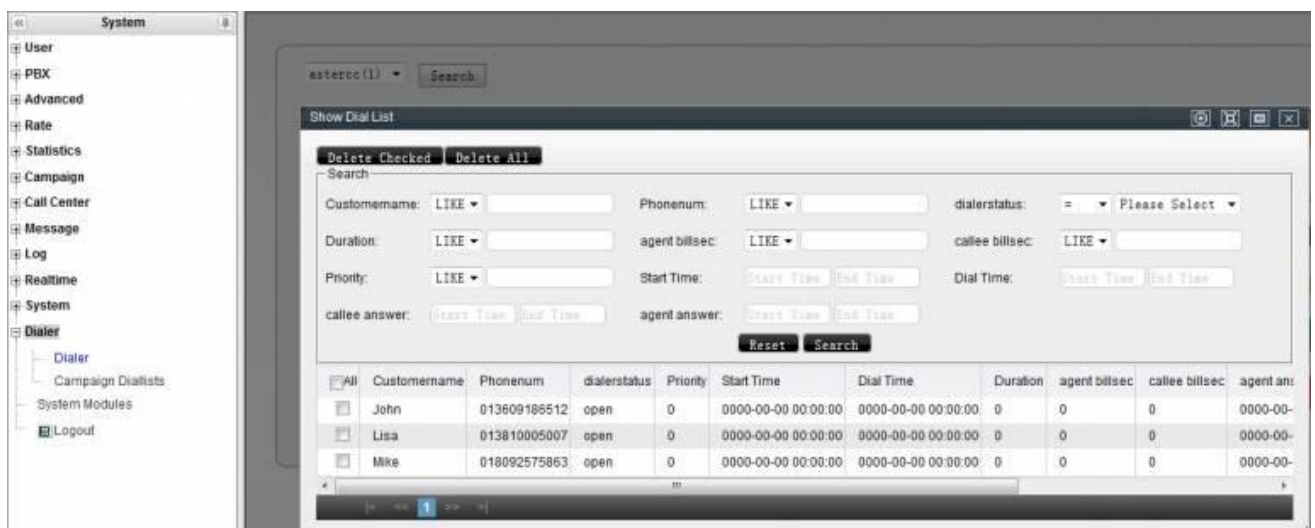


- In Dialer→ Dialer, click the Campaign name to see see how the dialer is progressing.

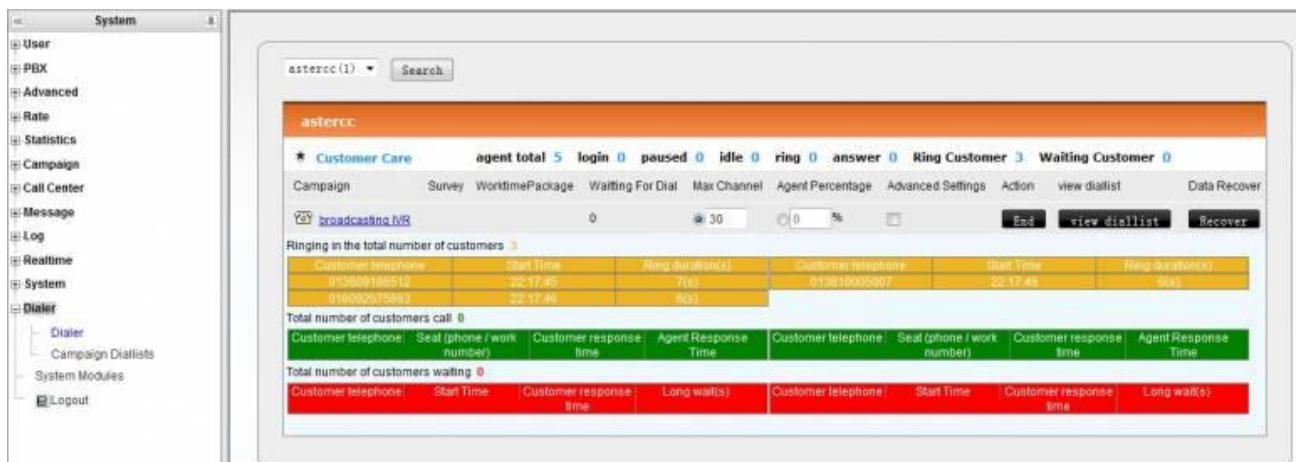
- In this case we use the max calls number limit to control the dialer (by default, the dialer module provides simultaneous 20 calls maximum)
- In Dialer Settings, under the Dialer section (not shown here), change the value of “Max Dialer Concurrent” to a minimum value of 2 and a maximum value lower than the number of corresponding channels that your trunk provider is allowing for the SIP account used in your system. Gateway or trunk providers usually supply 2 channels to allow one call. You can ask them for more channels. They will give them to you if you justify your request and most of all use them.



- If you click [viewDiallist], you will see the numbers that are to be dialed. You can delete data here if you need to.



- Click [Start] and the dialer and the system will automatically start doing its work
 - In the dialer page we can see the work related to the dialer going on.



System

astercc (1) Search

astercc

★ Customer Care agent total 5 login 0 paused 0 idle 0 ring 0 answer 0 Ring Customer 3 Waiting Customer 0

Campaign Survey WorktimePackage Waiting For Dial Max Channel Agent Percentage Advanced Settings Action view diallist Data Recover

☒ broadcasting IVR 0 30 0 % End view diallist Recover

Ringing in the total number of customers 0

Customer telephone	Start Time	Ring duration(s)	Customer telephone	Start Time	Ring duration(s)
013609185512	22:17:45	7(s)	013810005007	22:17:46	6(s)
018092575883	22:17:46	6(s)			

Total number of customers call 0

Customer telephone	Seat (phone / work number)	Customer response time	Agent Response Time	Customer telephone	Seat (phone / work number)	Customer response time	Agent Response Time

Total number of customers waiting 0

Customer telephone	Start Time	Customer response time	Long wait(s)	Customer telephone	Start Time	Customer response time	Long wait(s)



System

astercc (1) Search

astercc

★ Customer Care agent total 5 login 0 paused 0 idle 0 ring 0 answer 0 Ring Customer 0 Waiting Customer 1

Campaign Survey WorktimePackage Waiting For Dial Max Channel Agent Percentage Advanced Settings Action view diallist Data Recover

☒ broadcasting IVR 0 30 0 % End view diallist Recover

Ringing in the total number of customers 0

Customer telephone	Start Time	Ring duration(s)	Customer telephone	Start Time	Ring duration(s)

Total number of customers call 0

Customer telephone	Seat (phone / work number)	Customer response time	Agent Response Time	Customer telephone	Seat (phone / work number)	Customer response time	Agent Response Time

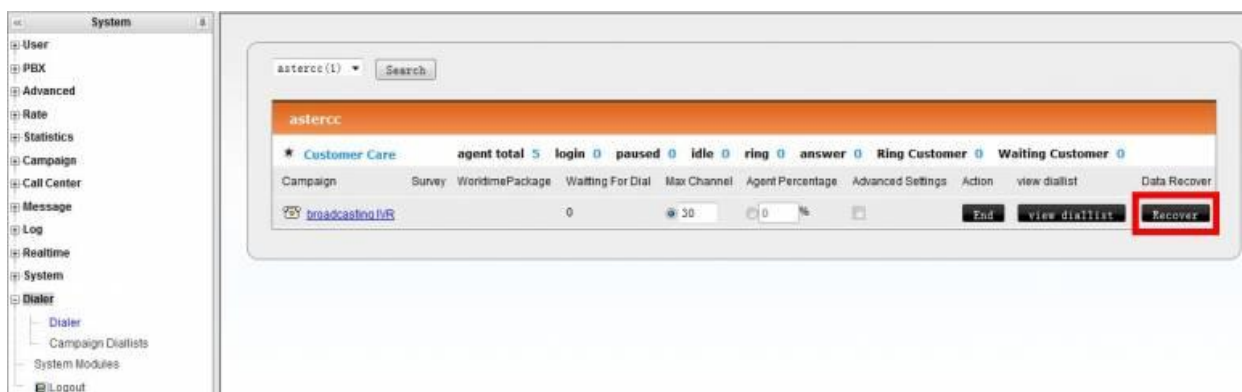
Total number of customers waiting 1

Customer telephone	Start Time	Customer response time	Long wait(s)	Customer telephone	Start Time	Customer response time	Long wait(s)
013810005007	22:20:01	22:20:09	10(s)				

9.Number Recycle

Predialer has a recycle function. You can re-add the numbers that have already been dialed. The system will then be able to re-dial them again.

- Dialer→ Dialer, click [recover]



System

astercc (1) Search

astercc

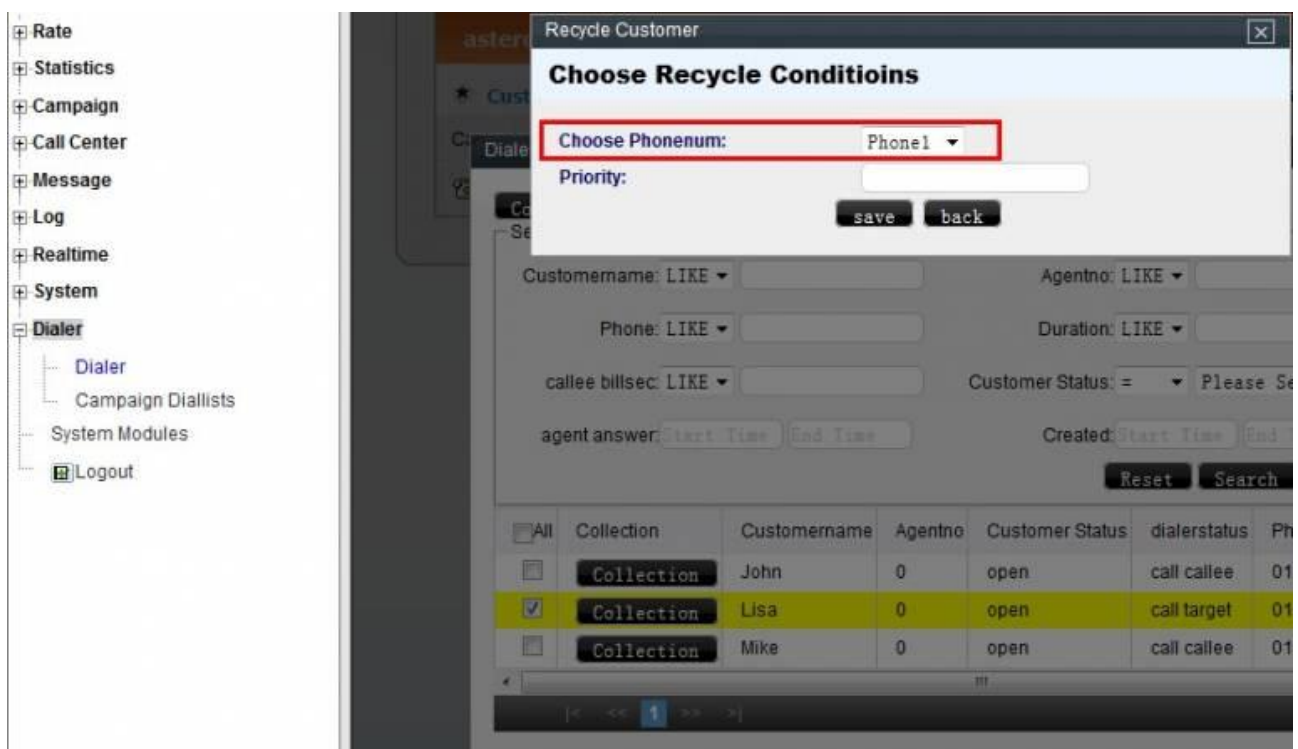
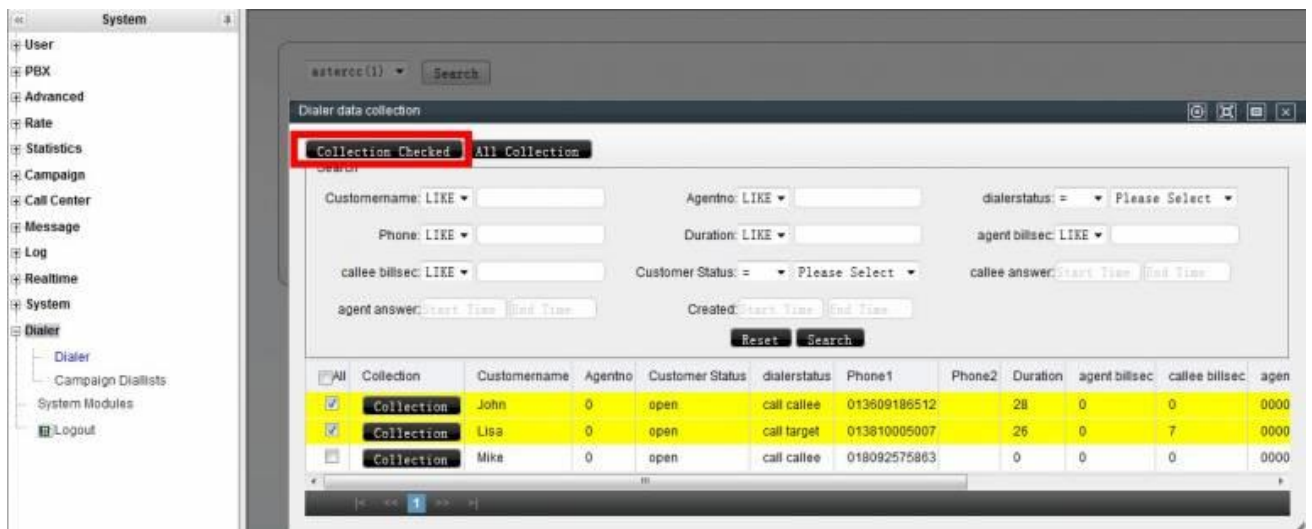
★ Customer Care agent total 5 login 0 paused 0 idle 0 ring 0 answer 0 Ring Customer 0 Waiting Customer 0

Campaign Survey WorktimePackage Waiting For Dial Max Channel Agent Percentage Advanced Settings Action view diallist Data Recover

☒ broadcasting IVR 0 30 0 % End view diallist Recover

- In the check-boxes, mark the the data that needs to be recycled. Then click [collection checked]

- There are numbers in a package, therefore the system will ask you which set of numbers is to be recycled.



10.Report

- Campaign→Campaigns, and double click campaign and *advanced*, you can see the stats of predialer campaign.

System

- User
- PBX
- Advanced
- Rate
- Statistics
- Campaign**
 - Campaigns
 - Blacklists
 - Customization
 - Individuals
 - Enterprises
 - Customer Packages
 - Results
 - Campaign Cdrs
 - Quality Control
 - QC Scores
 - Statistics
 - Customers
- Call Center
- Message
- Log
- Realtime
- System
- Dialer

Campaign Management

Edit Campaign

Basic Advanced

Dialway: Default Interval time: 30

QC percentage: 0 % Delay(second): 10

Dialermax: 1 Sametime Dial: No

Survey Limit: ignoredial Survey Fullscreen: manual

CIDName: Doubleclick to edit CIDNum: Doubleclick to edit

Hiding contact info.: No Transfer Priv.: free

Memo: Doubleclick to ... Serverip: 127.0.0.1

Dialer: start Dialertype: channel

Dialerval: 30 Dialer_ringnoanswer: 28

Dialer_totalringnoanswer: 1 Dialer_answerduration: 0

Dialer_totalanswer: 0 Dialer_calleeanswer: 2

Dialercount: 9 Dialerring: 0

Dialeranswer: 0 Dialeranswerrate: 0

ManagementFieldSet InterfaceFieldSet Auto-distribution plan Manual of the distribution plan Return

- In Campaign→ Campaign Cdrs, you can see the detailed call records
 - Choose the campaign you want to check on the top first

System

- User
- PBX
- Advanced
- Rate
- Statistics
- Campaign**
 - Campaigns
 - Blacklists
 - Customization
 - Individuals
 - Enterprises
 - Customer Packages
 - Results
 - Campaign Cdrs
 - Quality Control
 - QC Scores
 - Statistics
 - Customers
- Call Center
- Message
- Log
- Realtime
- System
- Dialer
 - Dialer
 - Campaign Dialists

Campaign Cdrs broadcasting IVR Search

Search

Src: Dst: Consultphone: Bitsec: calltype: Agentno: dialer target: Answer time: Start time: End time: Created: Last Time End Time

Reset Search Export xls file

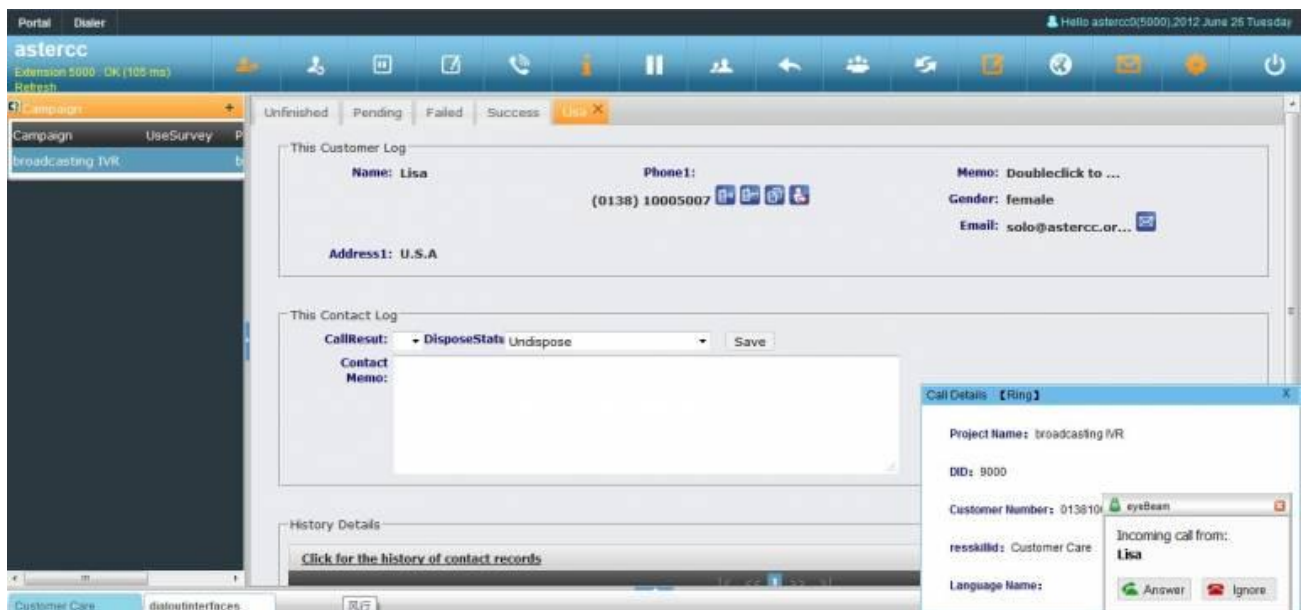
Record	Download	Campaignname	Customername	Src	Dst	Starttime
		broadcasting IVR	Lisa	013810005007	5000	2012-06-26 22:36:57
		broadcasting IVR	Lisa	013810005007	9000	2012-06-26 22:35:47
		broadcasting IVR	Lisa	013810005007	9000	2012-06-26 22:34:32
		broadcasting IVR	Lisa	013810005007	9000	2012-06-26 22:21:41
		broadcasting IVR	Lisa	013810005007	600	2012-06-26 22:20:09
		broadcasting IVR	John	013609186512	600	2012-06-26 22:29:01
		broadcasting IVR	John	013609186512	600	2012-06-26 22:17:48
		broadcasting IVR	Mike	018092575863	600	2012-06-26 22:17:52
		broadcasting IVR	Lisa	013810005007	600	2012-06-26 22:17:49

11. Agent Interface

- Set a monitor account and sign in before hand.



- As a monitor, the person has a supervisory control on pre-dialer
- When an operator service is chosen, the customer will be transferred to this group. Any agent who has signed in and is online will be rung and popped up.



26.13 How to Use Predictive Dialer in a Campaign



As a necessary tool in an effective call center, predial function raises the speed of dialing by batch-reading the telephone numbers, batch-dialing according to certain rules, and switch the phone calls to agents when the customers answer the phone. The number of the predialed calls can be dynamic regulated at any time, and the number of agents can be adjusted according to the network state. You are going to learn how to use this in the following tutorial.

Add a Campaign

At the system management interface, click "add" at the "Campaigns" page. Then start to configure it:

The screenshot shows the 'addCampaign' form in the Campaign Management interface. The 'Add' button is highlighted with a red circle and an arrow pointing to the form title. The form has two tabs: 'Basic' and 'Advanced'. It contains various fields for campaign configuration, including Campaignname, Priority, Customerpackage_id, Usemeetme, Userate, Campaignstatus, CustomerpackageType, Worktimepackage_id, Forcerecording, Surveyname, Allow_obtaindata, Agenttown_num, Eachfetchnum, Totalfetchnum, Team, billing account, Eventurl, Addnewcustomer, Autoidel, and Call Hint. At the bottom are 'Save' and 'Back' buttons.

Here you are going to choose which agents under which agent groups will be participating in the outbound dialing, which customers will the agents be assigned to dealing with, which fields of the customer information are visible and which are editable, whether the agents can see the process of their peers in the same group. You can also set the proportion of the whole assignment the quality inspector needs to do.

Campaign name: enter a name to identify it.

Customer package type: individual and enterprise. "Individual" means a list of all individual customers' information. "Enterprise" means the list of the enterprise's information under campaign management, including the its basic contact information.

Customer package id: the package of a number of selected customer information (from individual/enterprise list) for outbound dialing according to a certain rule or demand. Every campaign corresponds a customer package. The system would set up a datasheet, called sub table of individual or enterprise, everytime a package is created. It is for a convient management of the customer base and to prevent the data in the main table from destruction.

Allow obtain data: whether allow the agents to obtain data from the customer package on their own,

Agent own number: the max number of customers per agent can have.

Each fetch number: the max number of customers agent can be assigned to each time.

Qc percentage: qc = quality control. Set the proportion of the whole assignment the quality inspector needs to do. E.g. if you set a 50% here, and there are 100 data need to be checked, the quality inspector has to check 50 everyday.

Group agent id: choose an agent group under a team to work for the campaign.

More detailed settings to be completed in the "Advanced" menu.

Click **【save】** and a campaign is set up. The new campaign appears on the first line of the data list. Double-click the piece of data to edit.

Add a dial list

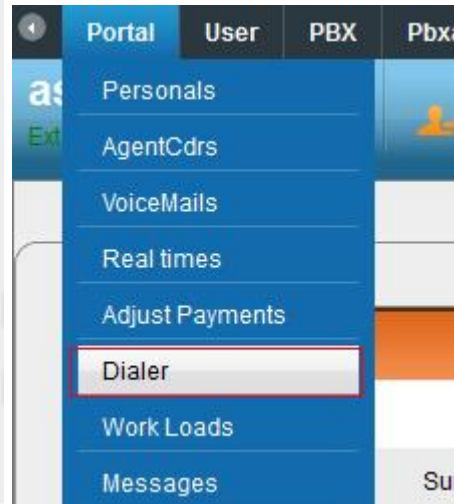
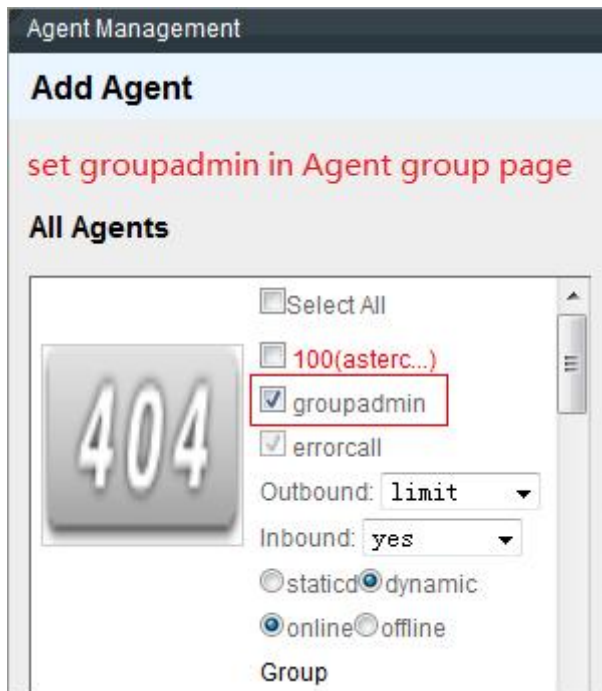
We have chosen the customer package type in the previous process. If no customer package has been assigned, the system would generate a customer package which has the same name as the campaign name.

Add customer information and import dial list into this package. You can check the dial list in the dialer interface of the agent's work interface.

In the previous chapter we have introduced how to configure fields and import customer information. Referring to those tutorials when necessary.

Predictive dialing

After adding the dial list, we can start the pre-dialing. Enter "Dialer" page under the agent's work interface as a **groupadmin**:



asterCC呼叫中心									
★ astercc01	agent total 4 login 1 paused 0 idle 1 ring 0 answer 0								
Campaign	Survey	WorktimePackage	Waiting For Dial	Max Channel	Agent Percentage	Advanced Settings	Action	view diallist	Data Recover
Sxxssx			0	0	0 %		Start	view diallist	Recover
stepOfCampaign			0	0	0 %		Start	view diallist	Recover
asterccdev		3516	0	0	0 %		Start	view diallist	Recover
2012new		0	0	0	0 %		Start	view diallist	Recover
234234		0	0	0	0 %		Start	view diallist	Recover
★ astercc02	agent total 4 login 0 paused 0 idle 0 ring 0 answer 0								
Campaign	Survey	WorktimePackage	Waiting For Dial	Max Channel	Agent Percentage	Advanced Settings	Action	view diallist	Data Recover

“Sxxssx” is the campaign assigned to the agent group “astercc01”. Followings are some of the fields:

Waiting for dial: the number of customers who are waiting for dialing.

Max channel: the number of this means how many calls can be made at the same time. E.g., you enter a 50 here, and the dialer senses that there are 30 in outbound calls, and 10 are ringing, the dialer would make another 10 calls to keep the whole number of calls being made staying at 50.

Agent percentage: the number of agents available multiplied by this percentage is the number of calls to be made. E.g., we set a 120% here, and the dialer senses that there are 40 agents available and there are 10 ringing in the campaign. Here $40 - 10 = 30$, and $30 * 120\% = 36$. The 36 is the number of calls to be made.

View diallist: open it and you will see the telephone numbers waiting for dialing.

Statement of agent stats:

Select AgentGroup: Total		TimeMode: ByTotal		View		export		xls	
AgentGroupBase	dialoutcount	dialoutansweredcount	DialoutAnsRate	DialoutAvgRingSec	DialoutAvgAnsSec	dialoutbillsec			
5009	4326	2555	59%	00:00:19	00:01:02	44:04:54			
5013	5227	2094	40%	00:00:23	00:00:52	30:00:15			
5024	5978	3419	57%	00:00:22	00:01:08	64:36:41			
5003	5475	3188	58%	00:00:19	00:01:10	61:46:01			
5021	5312	3138	59%	00:00:19	00:01:08	59:18:57			
5010	6622	3079	46%	00:00:20	00:01:13	62:39:11			
5001	8397	4127	49%	00:00:20	00:01:04	73:55:51			
5012	6279	3462	55%	00:00:19	00:01:05	62:55:13			
5008	6584	3559	54%	00:00:20	00:01:05	63:46:27			
5005	5340	2939	55%	00:00:20	00:01:06	53:44:18			

they can be onverted to xls/csv files also:

	A	B	I	J	K	L	M	N	O	P	Q
1	agentno	agentgroup	Dialout Count	CallOut	averageDial	average	dialoutB	consultNu	average	Confere	averageCon
2	5009	astercc	250	139	00:00:55	00:00:1	02:09:07	0	00:00:0	0	00:00:00
3	5013	astercc	89	51	00:00:52	00:00:2	00:44:47	0	00:00:0	0	00:00:00
4	5024	astercc	208	145	00:00:55	00:00:1	02:14:25	0	00:00:0	0	00:00:00
5	5003	astercc	193	126	00:01:10	00:00:2	02:27:42	0	00:00:0	0	00:00:00
6	5021	astercc	254	158	00:00:38	00:00:1	01:41:32	0	00:00:0	0	00:00:00
7	5010	astercc	229	127	00:01:06	00:00:1	02:20:39	0	00:00:0	0	00:00:00
8	5001	astercc	277	159	00:00:41	00:00:1	01:49:13	0	00:00:0	0	00:00:00
9	5012	astercc	108	67	00:01:22	00:00:2	01:32:23	0	00:00:0	0	00:00:00
10	5022	astercc	179	108	00:01:09	00:00:2	02:04:51	0	00:00:0	0	00:00:00
11	5008	astercc	207	133	00:01:09	00:00:1	02:34:59	0	00:00:0	0	00:00:00
12	5005	astercc	193	129	00:01:16	00:00:1	02:45:15	0	00:00:0	0	00:00:00
13	5011	astercc	124	67	00:01:02	00:00:1	01:10:17	0	00:00:0	0	00:00:00
14	5039	astercc	122	68	00:01:03	00:00:1	01:12:09	0	00:00:0	0	00:00:00
15	5034	astercc	247	131	00:00:55	00:00:1	02:01:54	0	00:00:0	0	00:00:00
16	5002	astercc	196	97	00:01:04	00:00:2	01:43:34	0	00:00:0	0	00:00:00
17	5017	astercc	210	136	00:01:02	00:00:1	02:22:33	0	00:00:0	0	00:00:00
18	5016	astercc	201	104	00:01:24	00:00:1	02:26:28	0	00:00:0	0	00:00:00
19	5023	astercc	161	101	00:01:29	00:00:1	02:29:49	0	00:00:0	0	00:00:00
20	5006	astercc	199	131	00:01:06	00:00:1	02:25:04	0	00:00:0	0	00:00:00

	A	O	P	Q	R	S	T	U	V	W	X
1	AgentGro	dialoutcount	dialoutans	DialoutA	DialoutAvgR	DialoutAv	dialoutbil	consult	consultA	confere	conferen
2	astercc	4463	2646	59%	00:00:19	00:01:02	45:30:33	0	00:00:00	0	00:00:00
3	astercc	9383	4811	51%	00:00:26	00:01:55	153:09:18	0	00:00:00	0	00:00:00
4	astercc	15556	7961	51%	00:00:26	00:02:25	321:10:26	0	00:00:00	0	00:00:00
5	astercc	5227	2094	40%	00:00:23	00:00:52	30:00:15	0	00:00:00	0	00:00:00
6	astercc	18225	9105	50%	00:00:26	00:02:19	350:34:19	0	00:00:00	0	00:00:00
7	astercc	26137	13279	51%	00:00:25	00:01:39	364:58:48	0	00:00:00	0	00:00:00
8	astercc	5978	3419	57%	00:00:22	00:01:08	64:36:41	0	00:00:00	0	00:00:00
9	astercc	5475	3188	58%	00:00:19	00:01:10	61:46:01	0	00:00:00	0	00:00:00
10	astercc	18436	9548	52%	00:00:25	00:01:57	309:44:04	0	00:00:00	0	00:00:00
11	astercc	19208	9934	52%	00:00:25	00:02:00	332:12:55	0	00:00:00	0	00:00:00
12	astercc	5312	3138	59%	00:00:19	00:01:08	59:18:57	0	00:00:00	0	00:00:00
13	astercc	6622	3079	46%	00:00:20	00:01:13	62:39:11	0	00:00:00	0	00:00:00
14	astercc	18668	9785	52%	00:00:24	00:02:04	337:28:50	0	00:00:00	0	00:00:00
15	astercc	8397	4127	49%	00:00:20	00:01:04	73:55:51	0	00:00:00	0	00:00:00
16	astercc	14903	8720	59%	00:00:24	00:01:54	276:50:38	0	00:00:00	0	00:00:00
17	astercc	6279	3462	55%	00:00:19	00:01:05	62:55:13	0	00:00:00	0	00:00:00
18	astercc	12212	6878	56%	00:00:23	00:02:42	310:18:47	0	00:00:00	0	00:00:00
19	astercc	6584	3559	54%	00:00:20	00:01:05	63:46:27	0	00:00:00	0	00:00:00
20	astercc	18710	9527	51%	00:00:25	00:01:37	255:34:43	0	00:00:00	0	00:00:00

The digitized workload is helpful for further decisions on your business.