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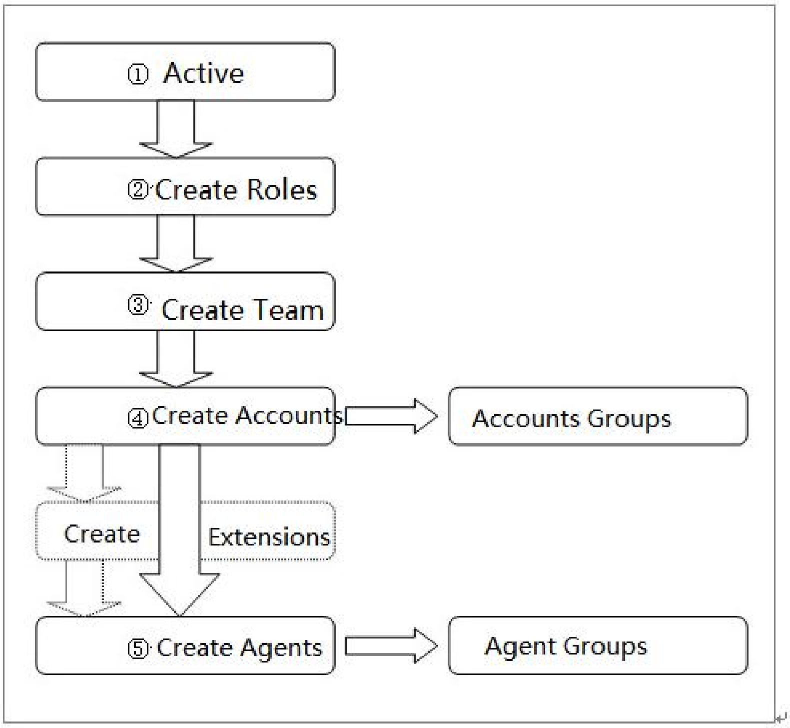
1. Accounts and Privilege

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 sett 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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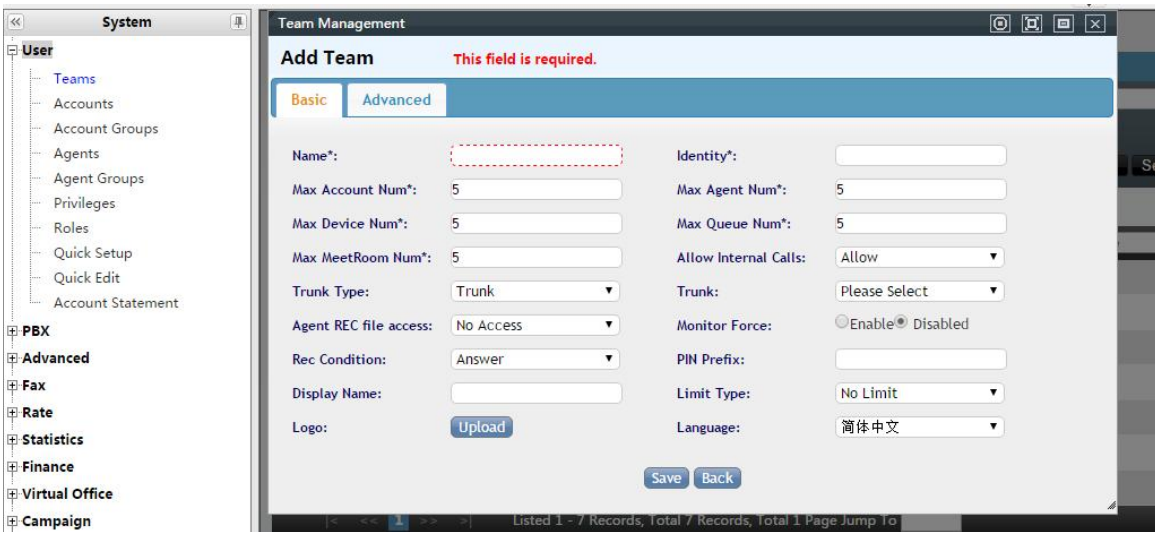
User groups are mainly used to limit their extensions'calling authority.
The agent groups are for tasks allocation.

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 seting 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:

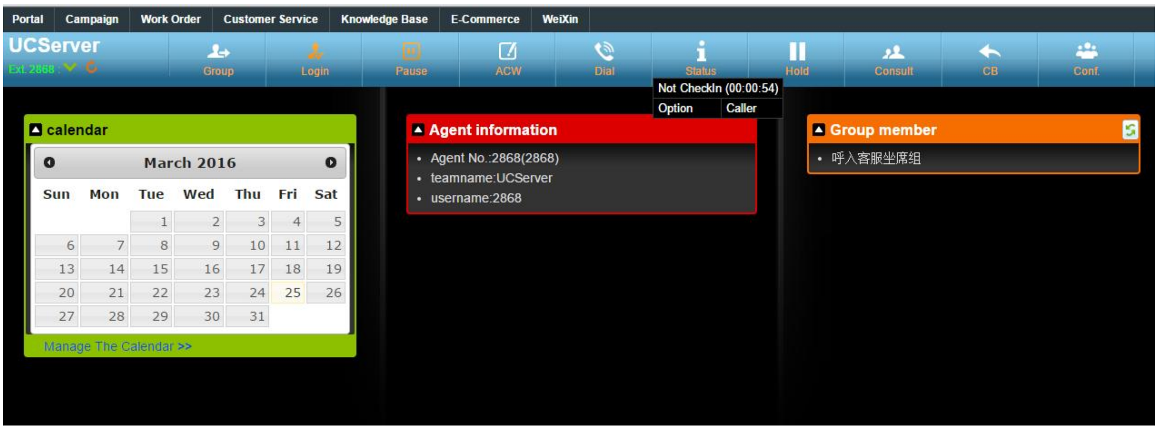


- **Name*:** the name of the custom team, eg: VINA-PBX;,
- **Identity*:** identify your own team so it can be distinguished from others It must be unique and composed of numbers or letters;

> The idengity 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 forcely 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.

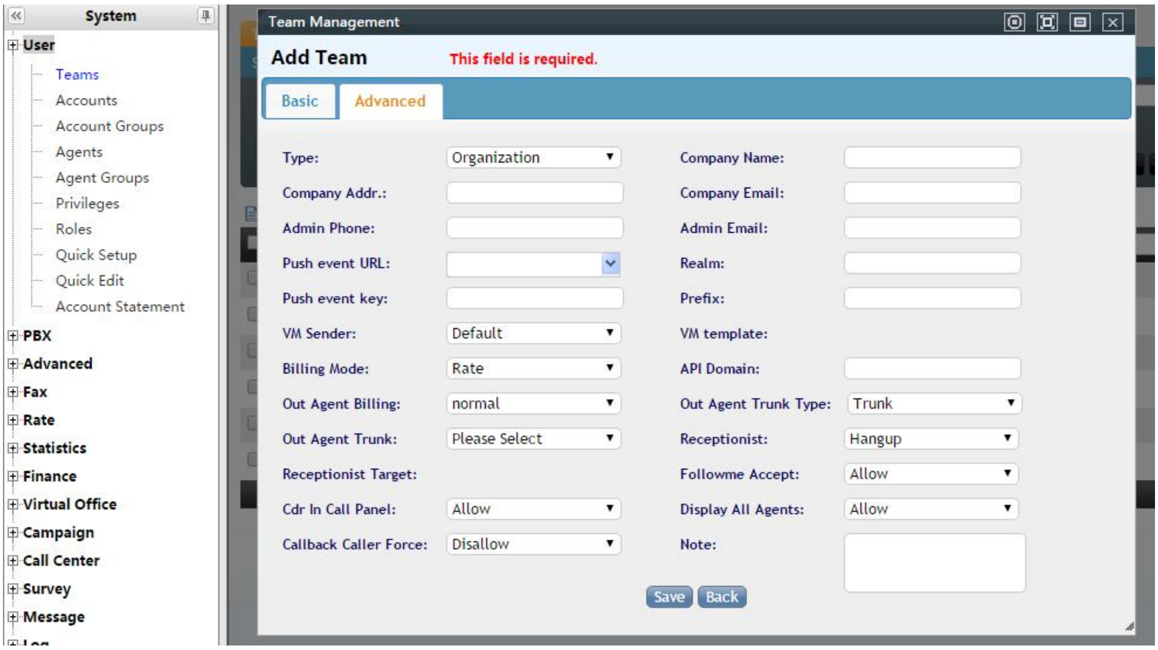


- **LOGO:**The uploaded logo will display when the agent login his background.
- **Language:** Set the default language for your team.

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

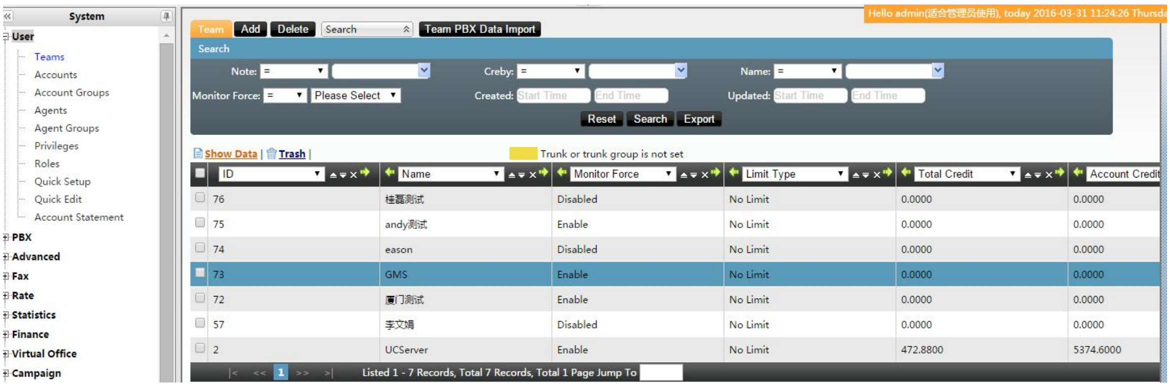


- Admin EMAIL
- Push event URL
- Realm
- Prefix: If set, this prefix is required when calls made from other team within the same system.
- VM Sender
- VM Template
- Billing Mode: By rate or minute
- API Domain
- Out Agent Billing
- Out Agent Trunk Type:
- Out Agent Trunk
- Receptionist
- Followme Accept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

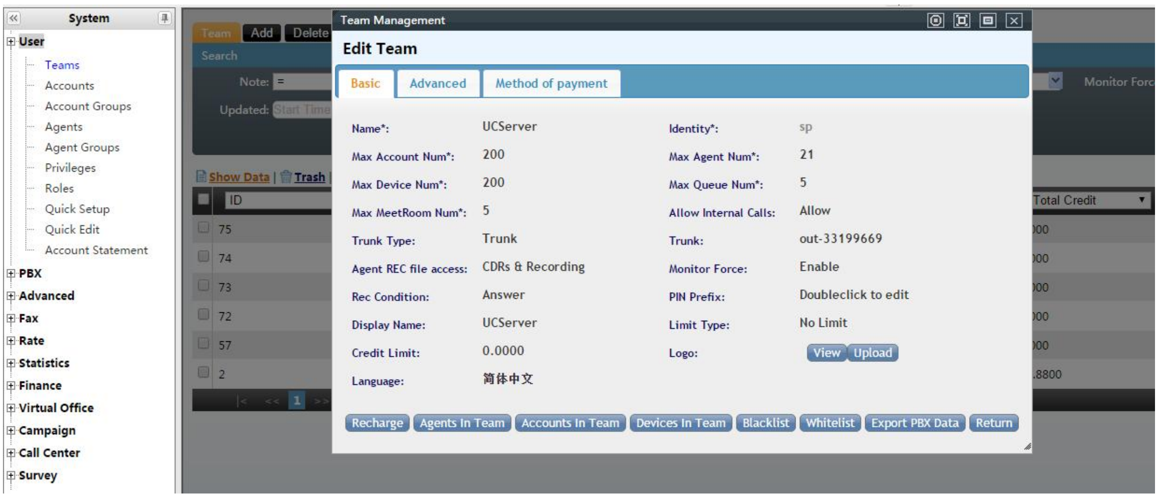
- Note

Edit Team

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

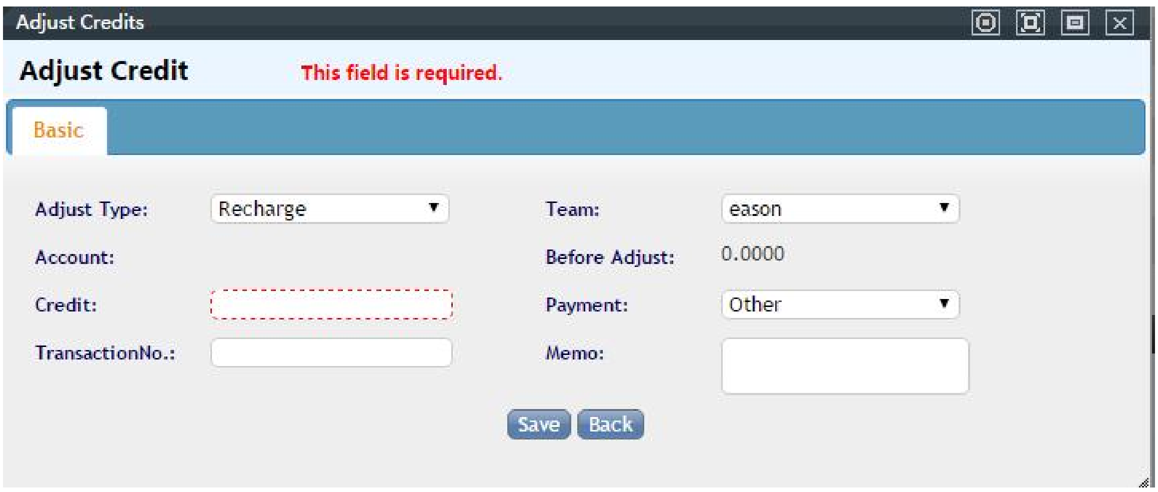


Double clike your team to edit it. The characters in black can be edited, and the grey ones are only for view.

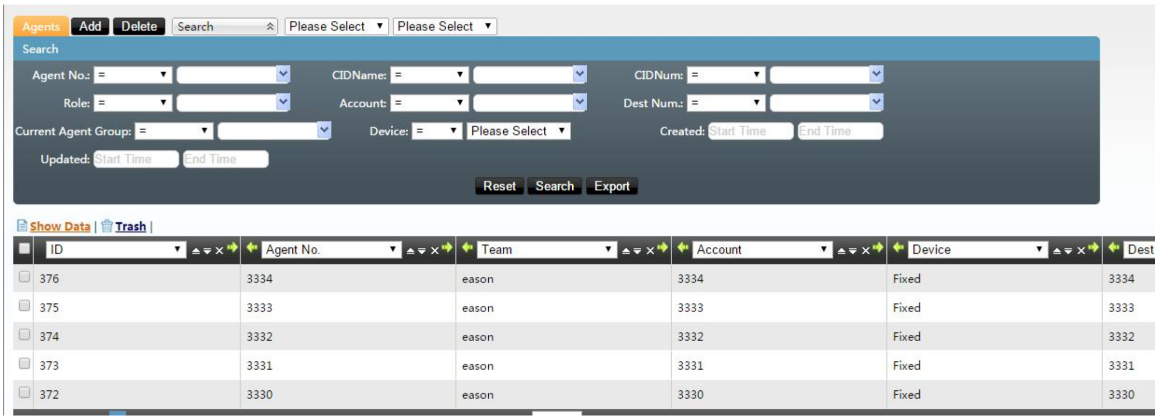


There are eight more buttons appearing on the bottom of the edit page:

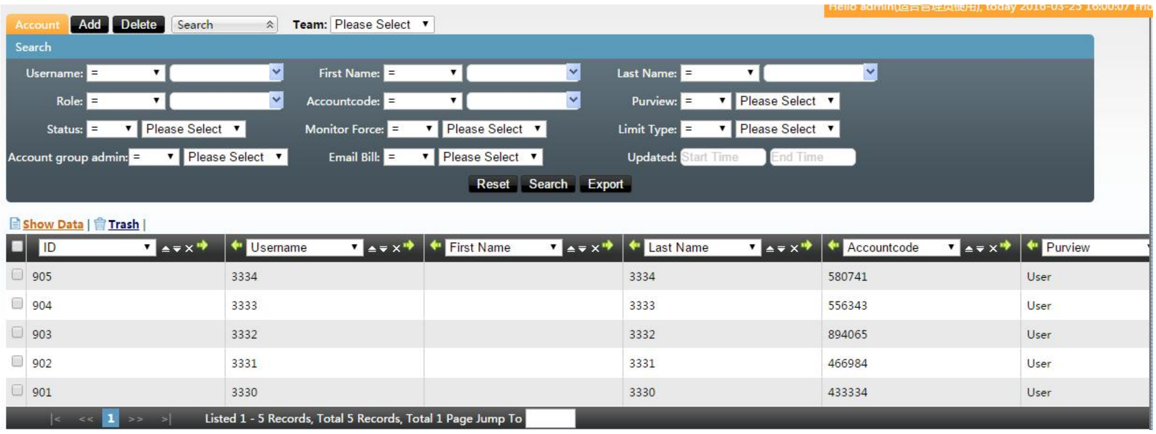
- **Recharge:** Click it and a new window will popup which shows how to do recharging for your team.



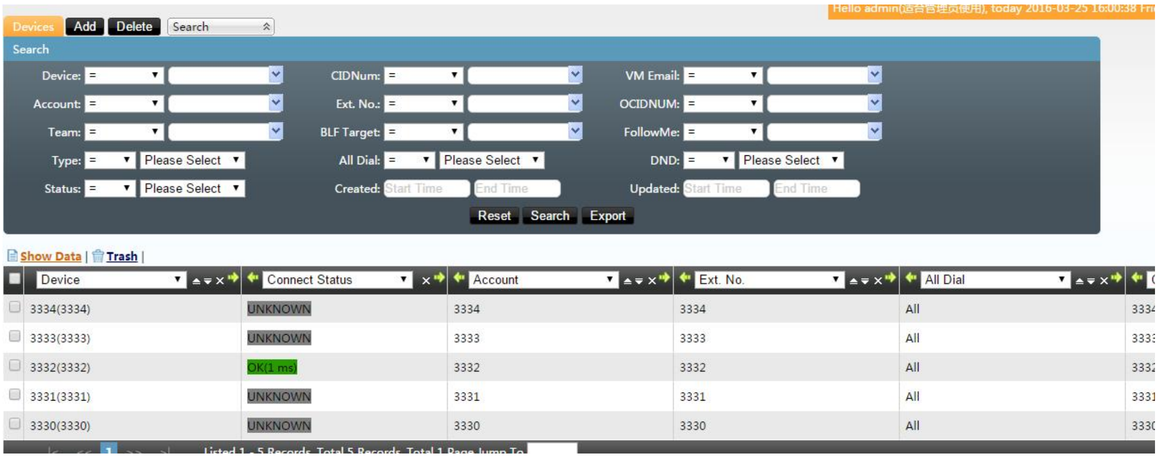
- **Agents in Team:** Click it and a new window will popup which shows all the agents in your team, equals to the agent management page. You can search by team.



- **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.

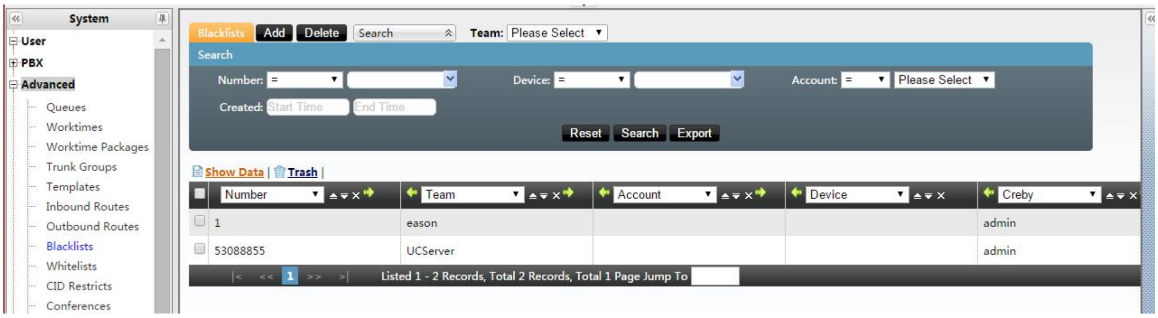


- **Devices in Team:** Click it and a new window will popup which shows all the devices in your team, equals to the devices management page. You can search by team.



- **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.

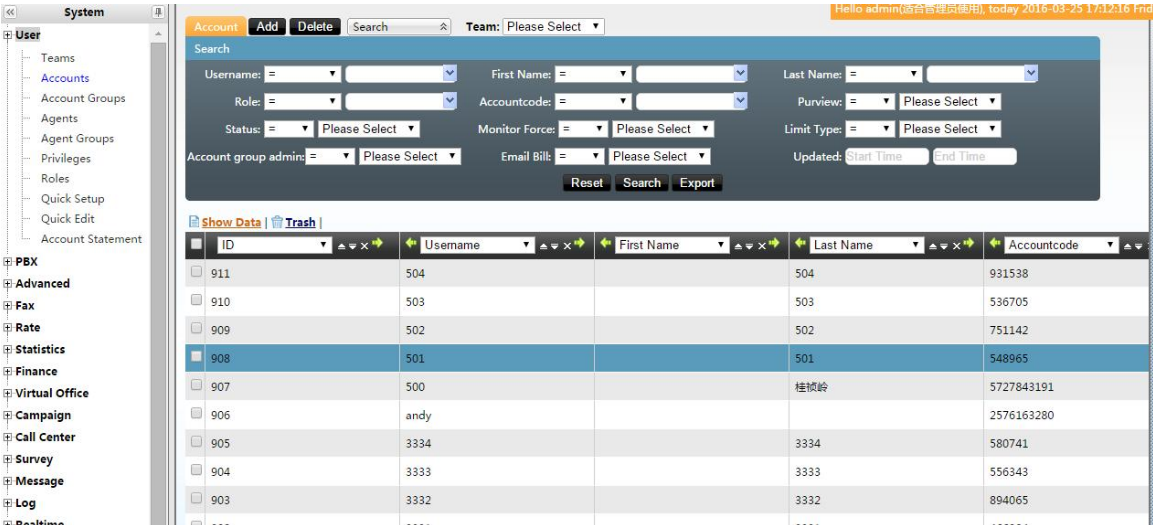
Note

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

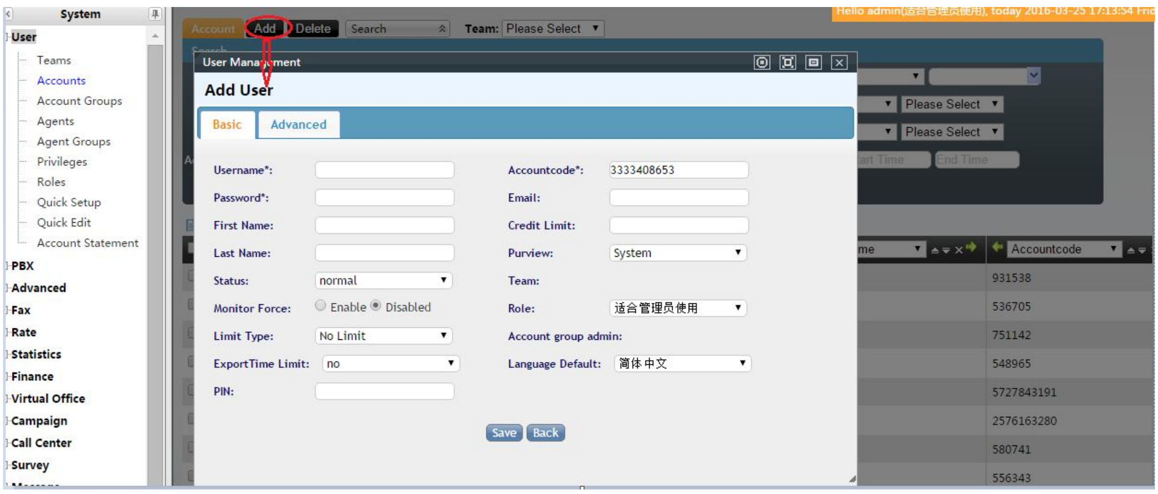
Click User–>Account,it will show all the accounts in the system.



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		桂禎岭	5727843191
906	andy			2576163280
905	3334		3334	580741
904	3333		3333	556343
903	3332		3332	894065

Add Account

Click Add to add new accounts



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.

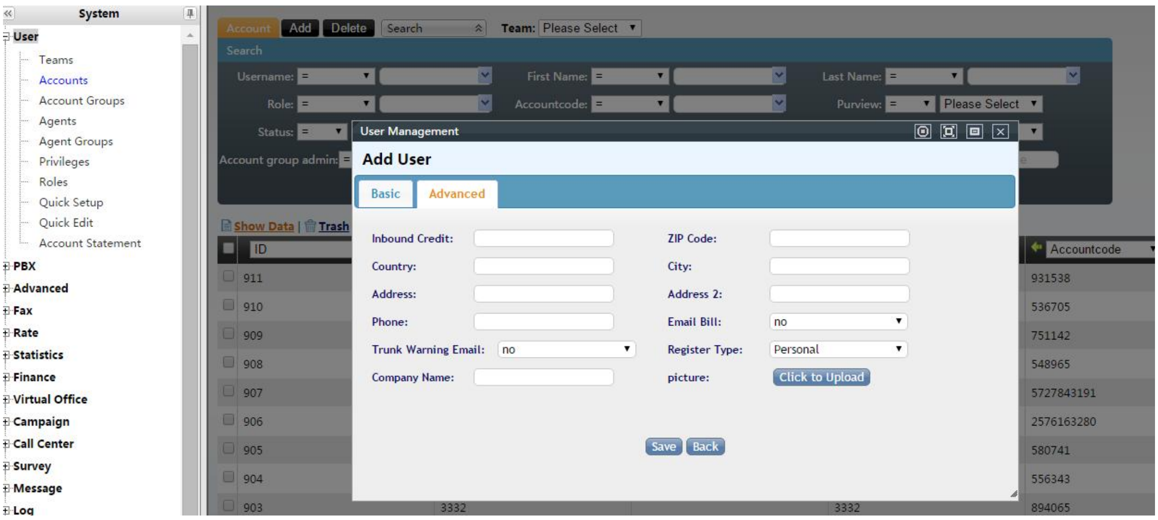
- Team: The account will be the team administrator, which manage all the accounts under its team.
- User: The account is the common user , and have common privilege.

- **Status:**Enable or disable this account.The default is enable.
- **Monitor Force(Record):** whether to mandatorily record this account, forbidden by defult.
- **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



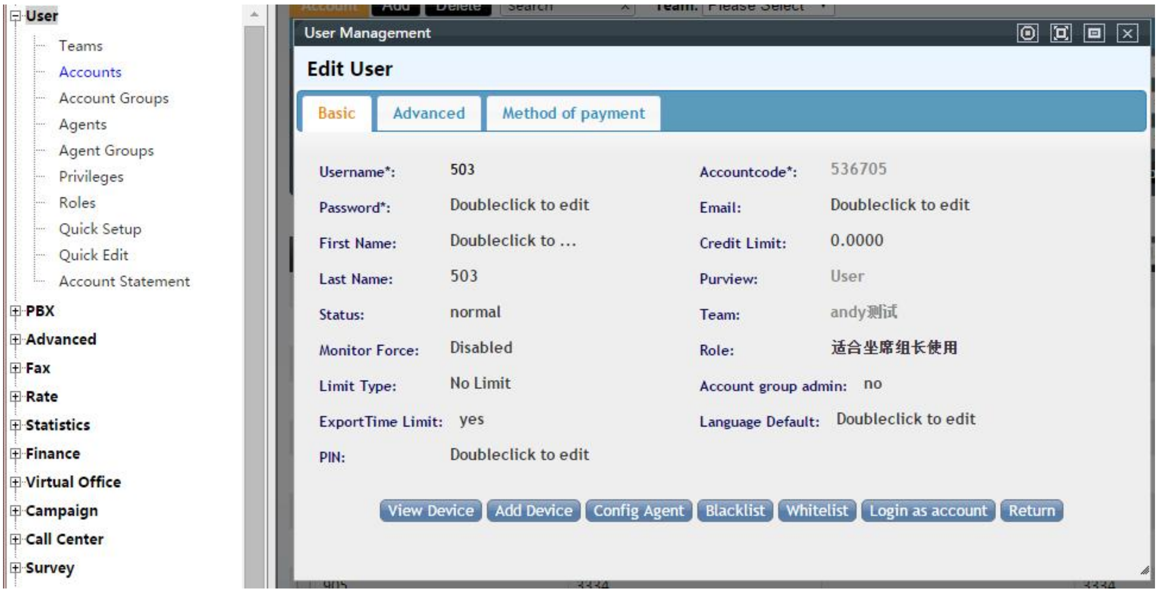
- **Inbound Credit:** When this account's role is agent, and we have set inbound calling fee to this agent, then this field will show its total inbound calling fee.
- **ZIP Code:**
- **Country:**
- **City:**
- **Address:**
- **Address2:**
- **Phone:**
- **Email Bill:**If set yes, the bill will send to 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

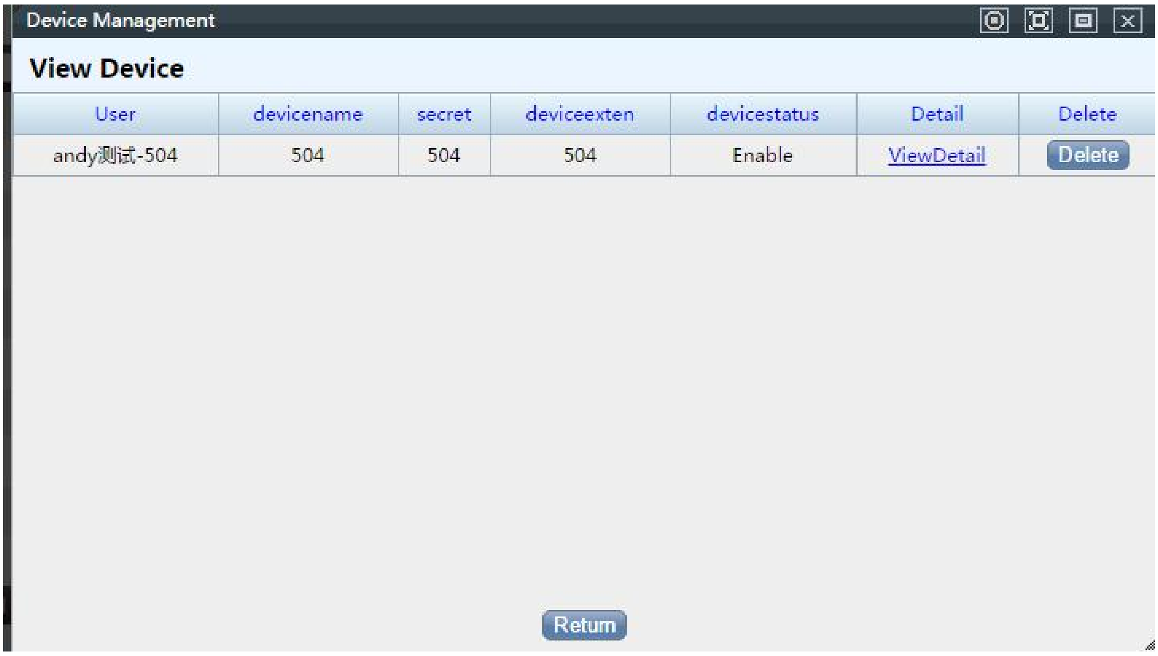
* Items are obliged to fill, the rest can be filled out when you find it necessary. when you complete, click "Save" button.

Edit Account

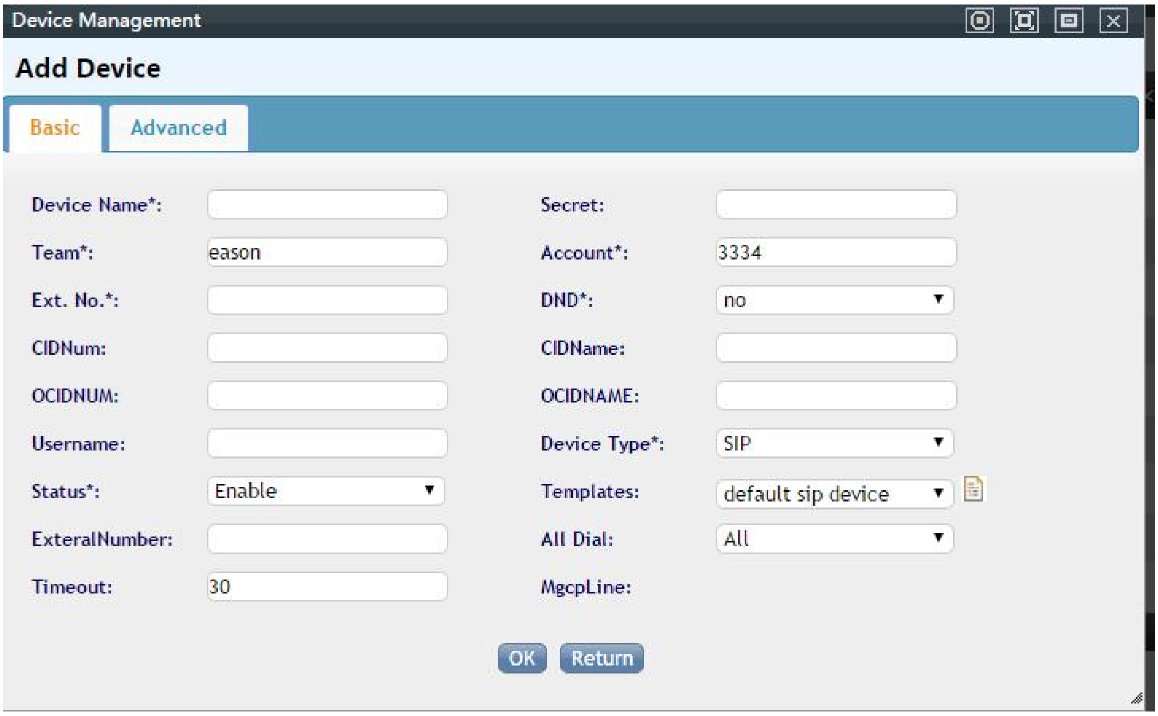
We add three three more wizards to the accounts with the purview of user.(View Device,Add Device and Config Agent). The other purview doesn't have these wizards. The rest wizards are common for all account purview.



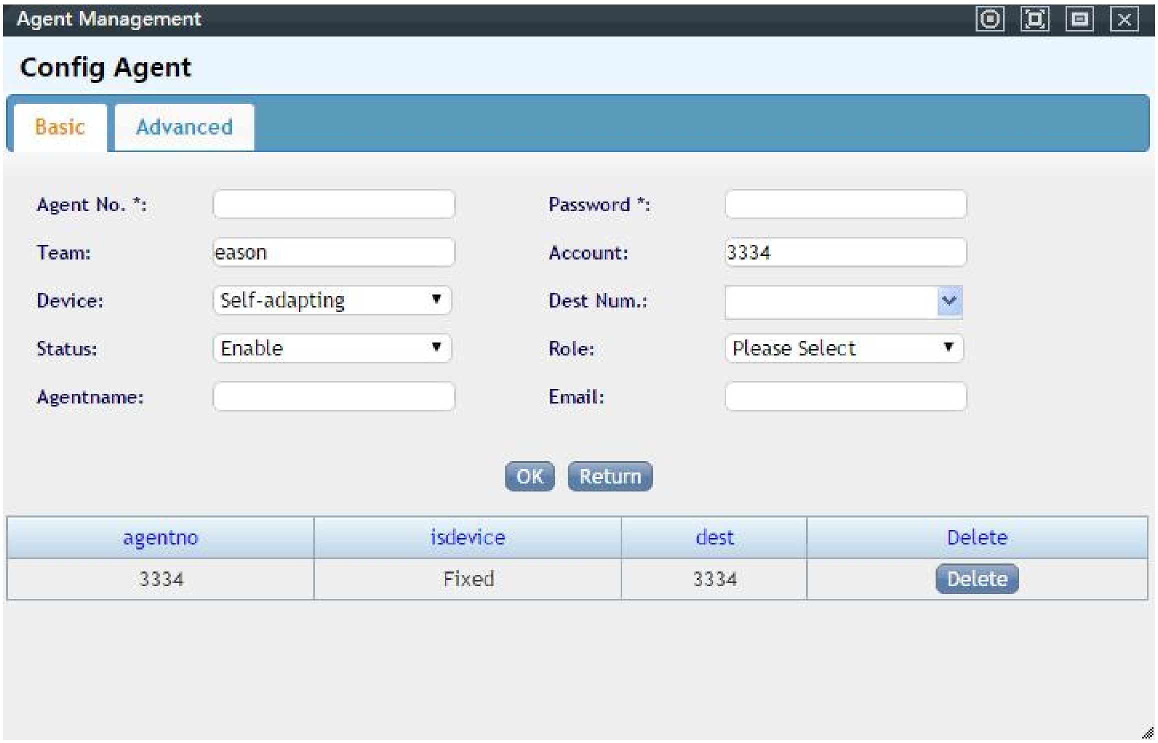
View Device: This page shows all the extensions under this account. Click View Detail, it will go to PBX–> Devices. You can edit these extensions if needed.It equals to device edit function.



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

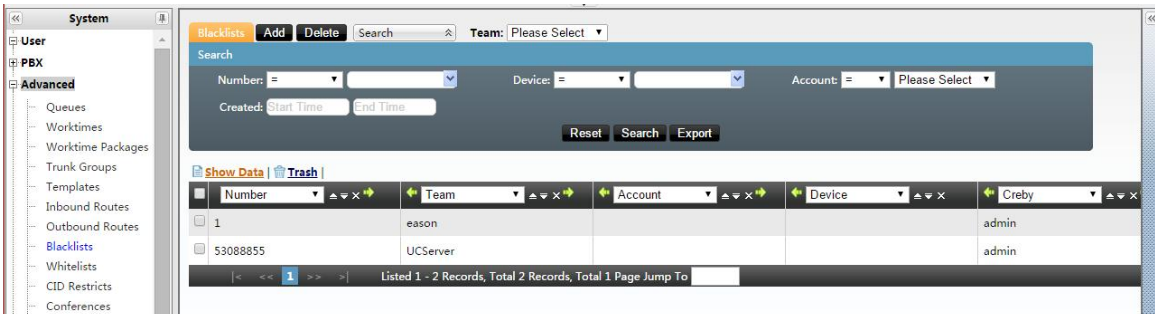


Config Agents: It equals to Users–>Agents->【Add】.You can add,edit and delete agent if needed.



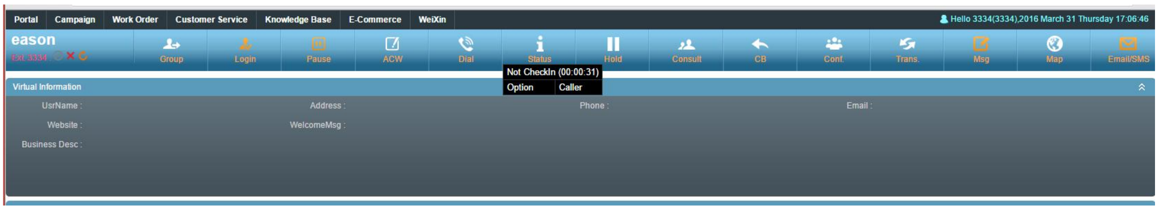
- **Blacklist**：Click it and a new window will popup where you can check and add blacklist here. Enter the numbers, click [Add to blacklist] button, and all the numbers in the blacklist will not be able to dial in to your team.

- 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

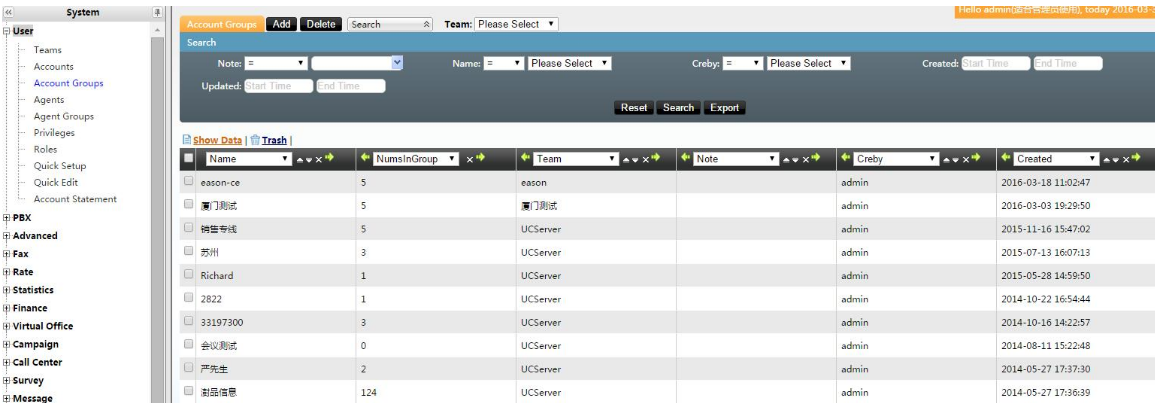
- **Login as account**: Click it and the page will turn to this account's logoin page.It will load the agent desk, agent administrator's desk, IVR CDRs,ect.



1.4 Account Group

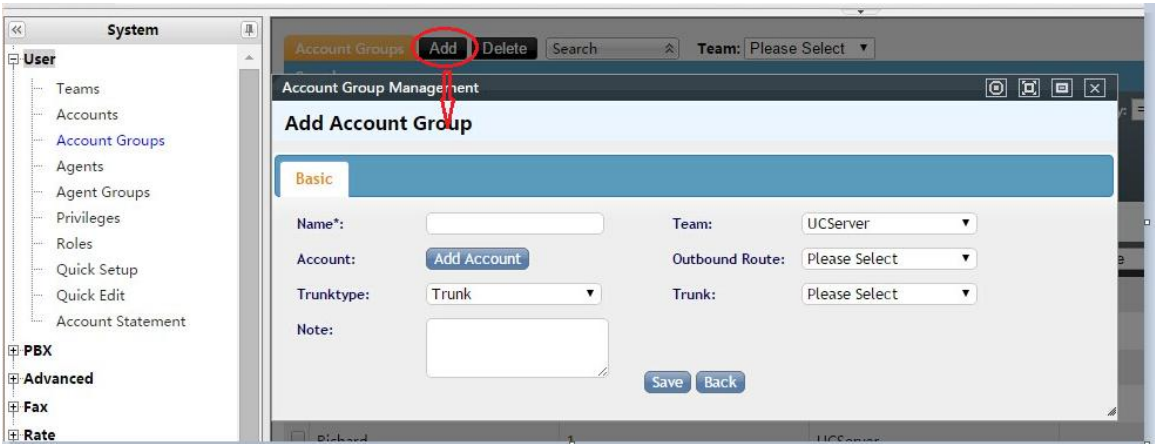
The account group is used to help Rate management → Agent incoming call rate management. You can put the accounts with the same policies into a group to unify the charge calculation, which can simplify the management of the numerous accounts and agent rates.

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

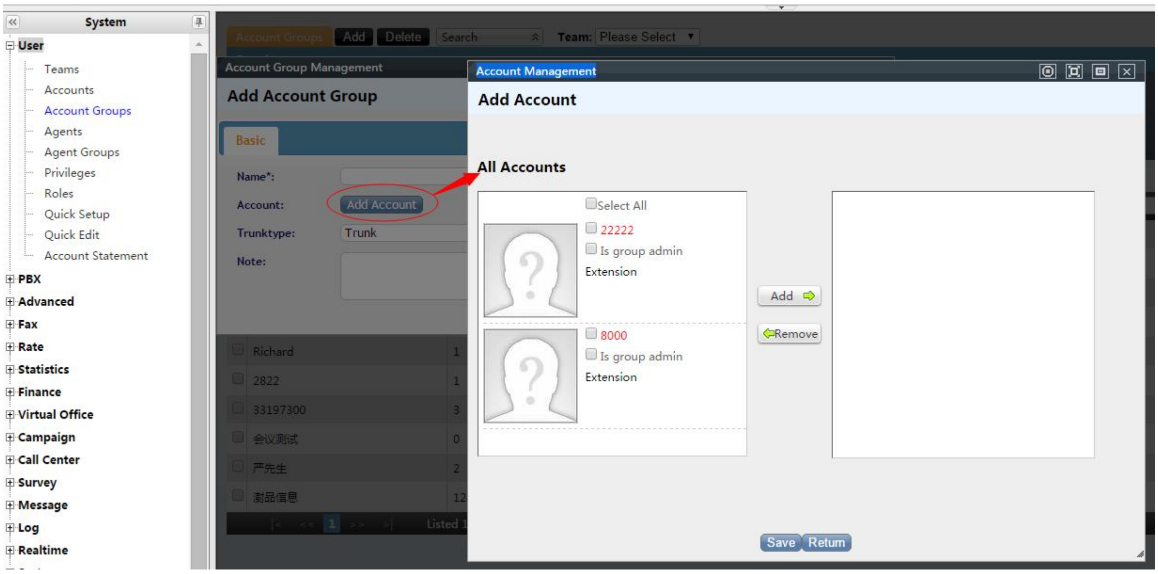
Click【Add】to add a new account group



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.

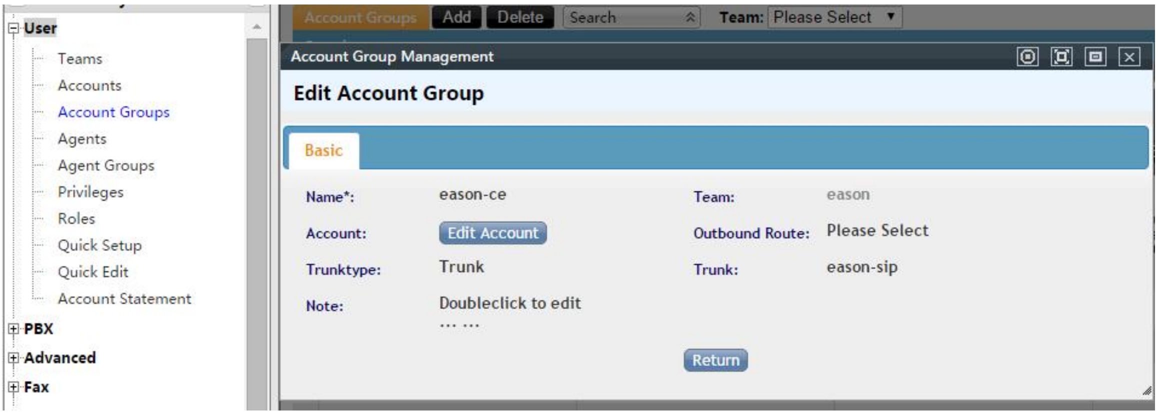
Optional Fiels

- **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

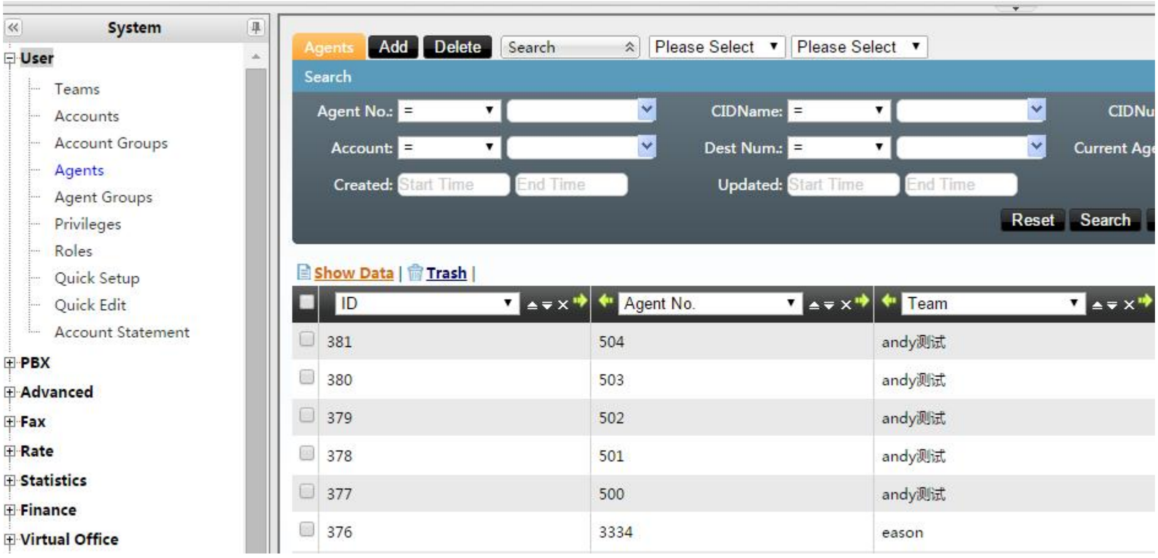
Agent is the one who take care of call center task.Every agent account is associated with a system account. Each agent has a unique job numbers consists of digits.This job number is mainly the agent's identity in the system. In addition, in some applications, before call established, the caller will 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.

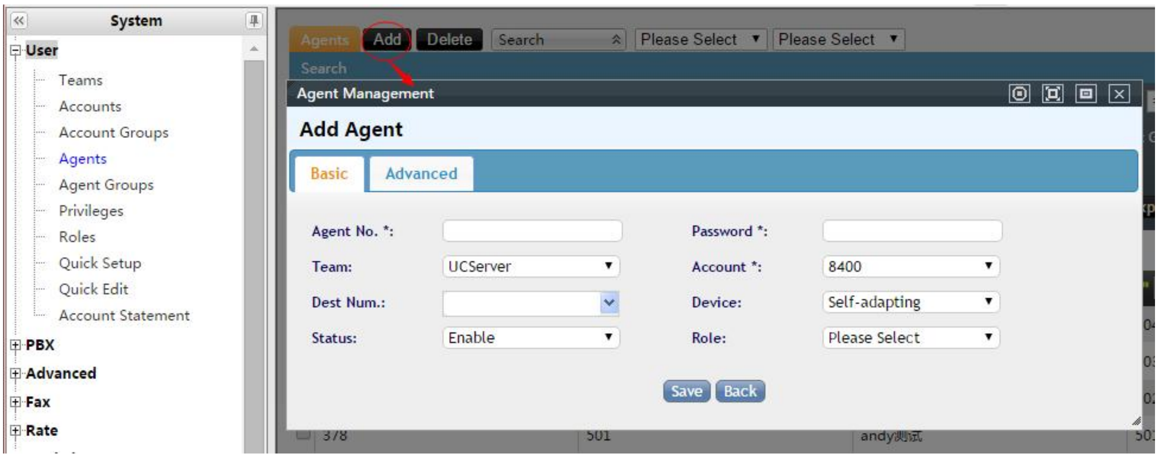
When agents using click to call function, the system will call agent firstly, then call the target numbers.

Add Agent

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



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



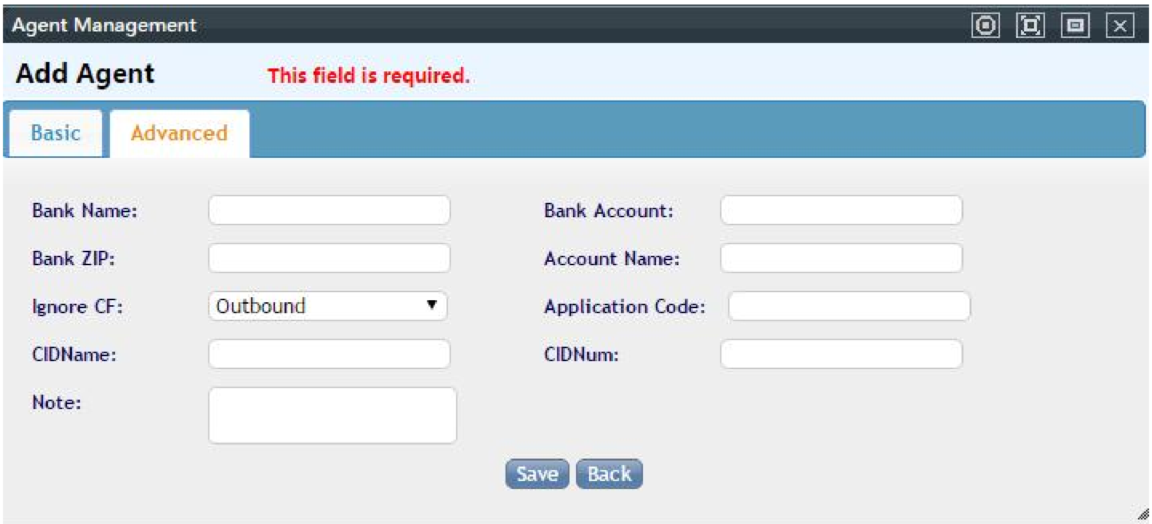
Mandatory fields

- **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



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

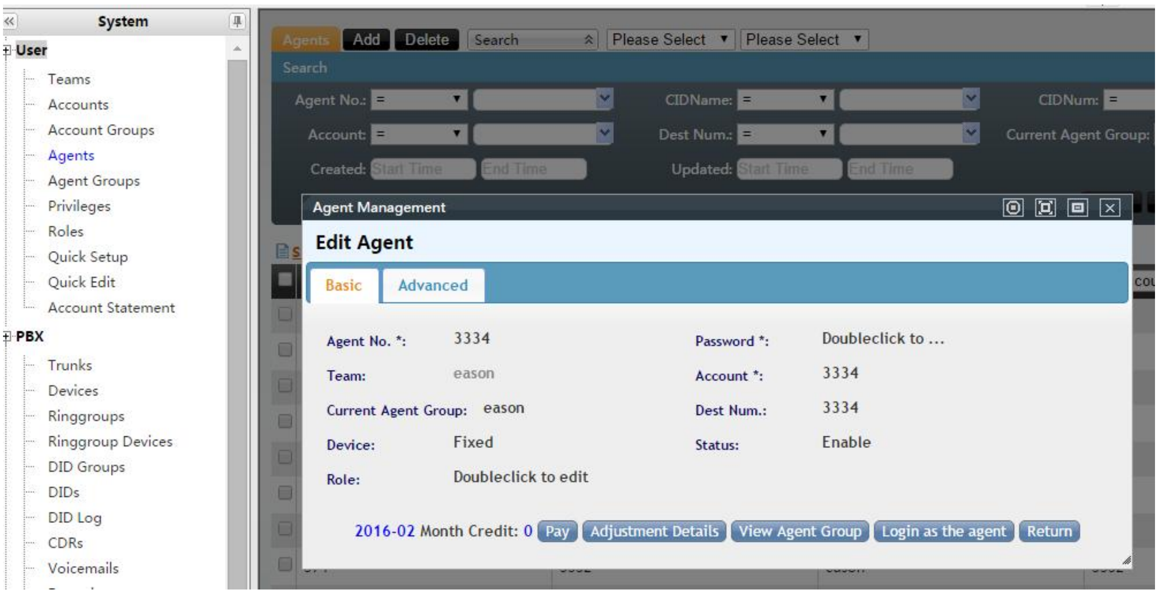
•**CID Num:**

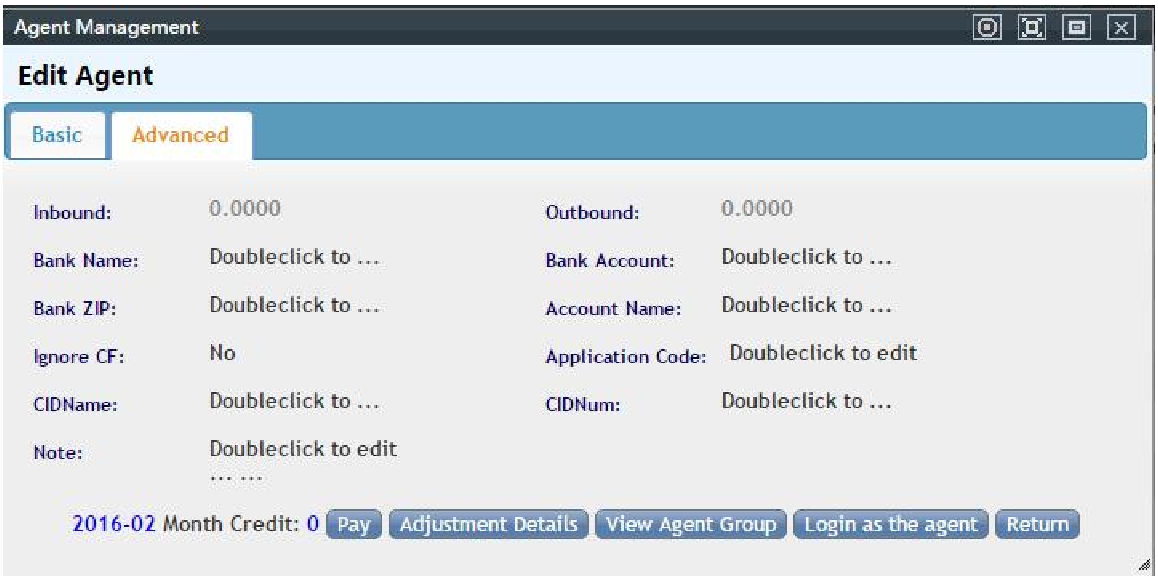
•**Note:**

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:

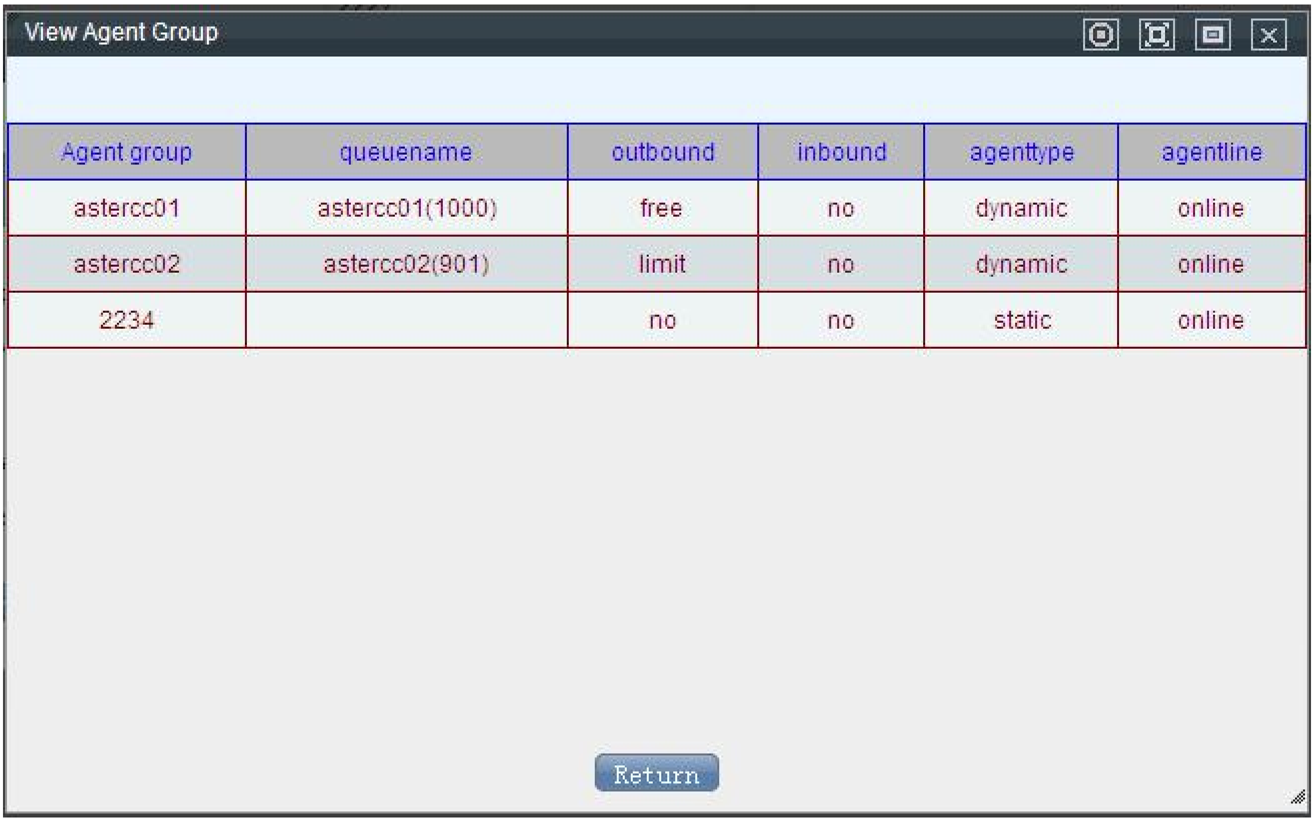
- **Inbound:** It can be viewed only and calculates the inbound fee of this agent.(Please refer to Rate->Agent Rates);
- **Outbound:** It can be viewed only and calculates the outbound fee of this agent.(Please refer to Rate->Customer Rate);

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;


View Agent Group

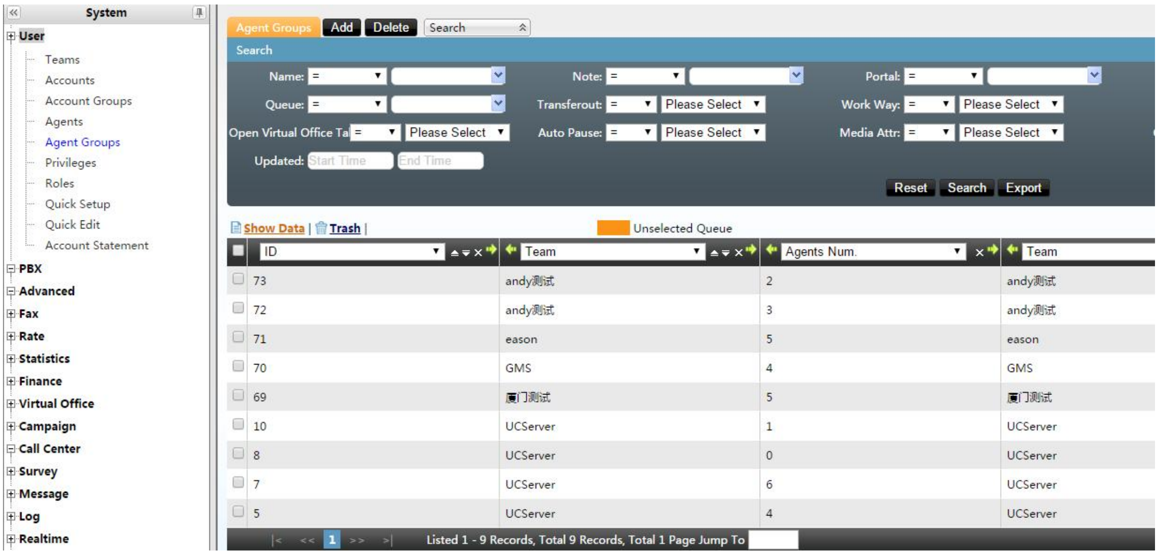
Agent group	queuename	outbound	inbound	agenttype	agentline
astercc01	astercc01(1000)	free	no	dynamic	online
astercc02	astercc02(901)	limit	no	dynamic	online
2234		no	no	static	online

Return

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

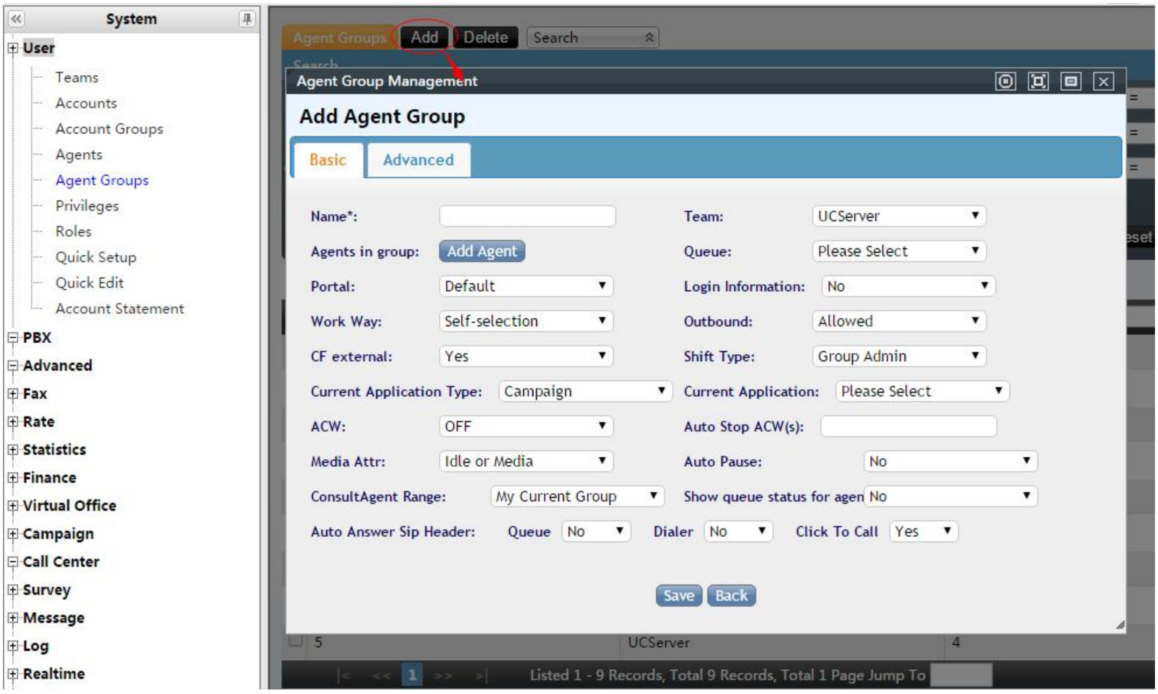
1.6 Agent Groups

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.



Add agent group

Click Add



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 numberm, 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 selece 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

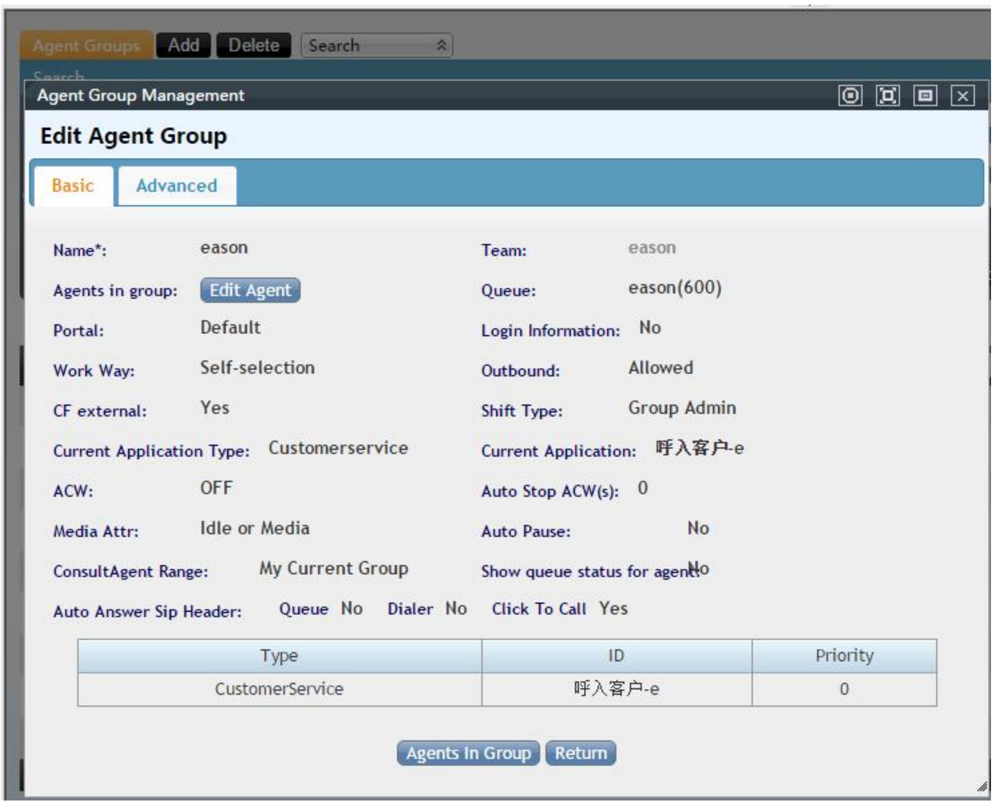
If agent is working for a campaign, he could dial all the numbers in the campaign even it's "Not Allowed"

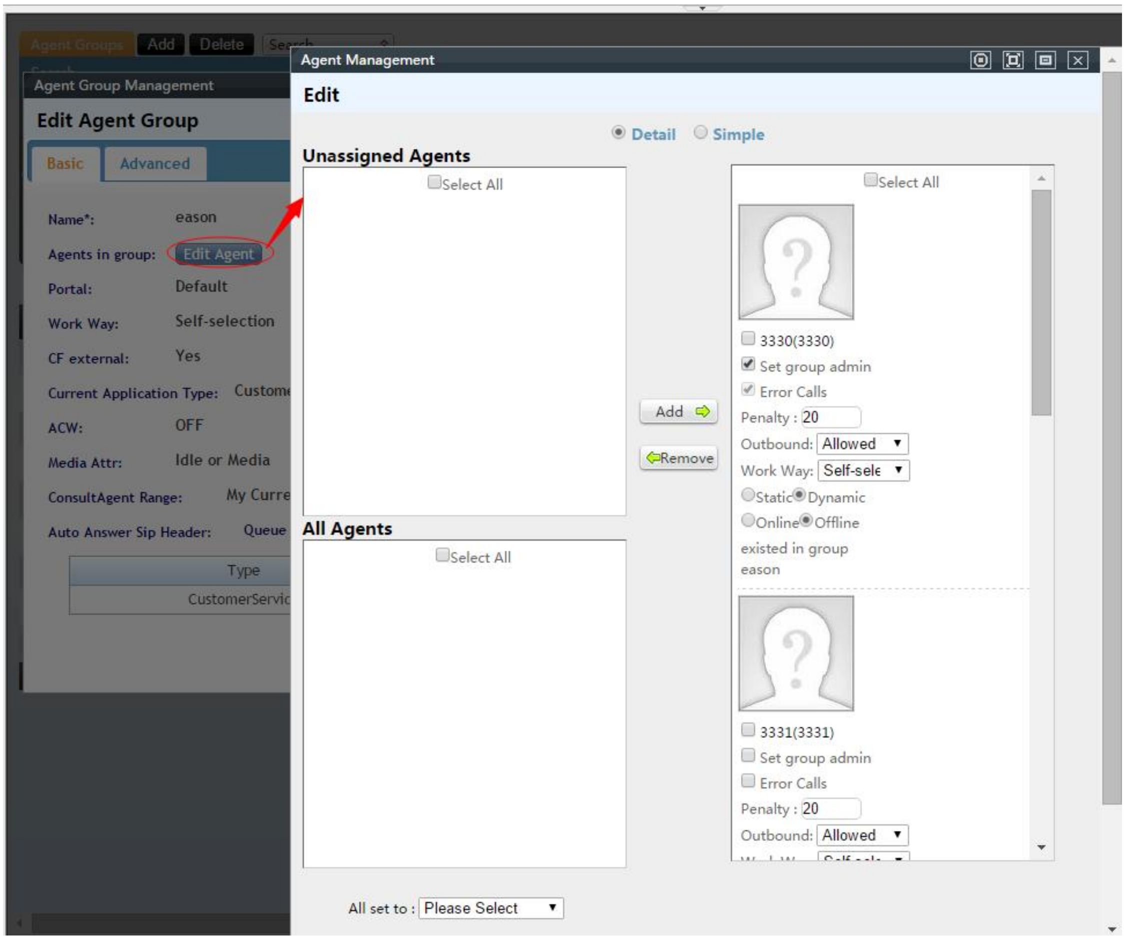
- **CF External**：Set to Yes if agents are allowed to consult an external number, Set to No if agents are only allowed to consult other agents
- **Shift Type**
- Group Admin: The shift designed by the group administrator
- Self: Do the shif personaly
- **Current Application Type:**
- **Current Application:**
- **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 automaticly
- **Consult Agent Range**:

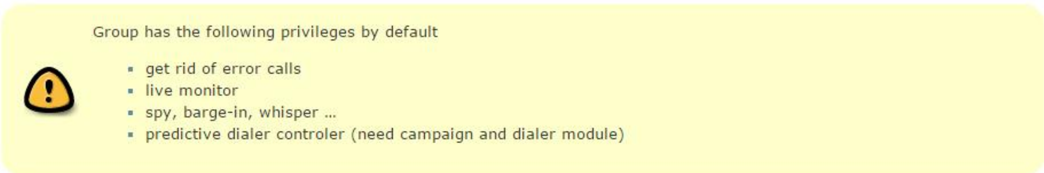
- **Show queue status for agent**
- **Auto Answer SIP Header**
- **Click To Call:**

Edit Agent group

- Double click to edit an agent group



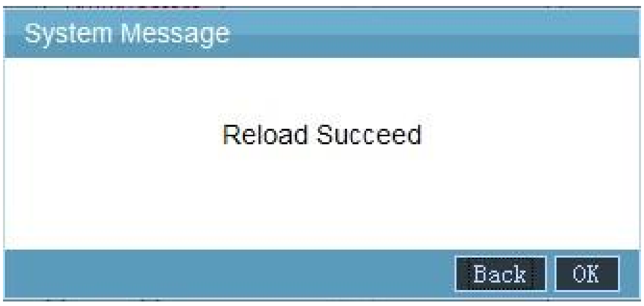




Note:

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.

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

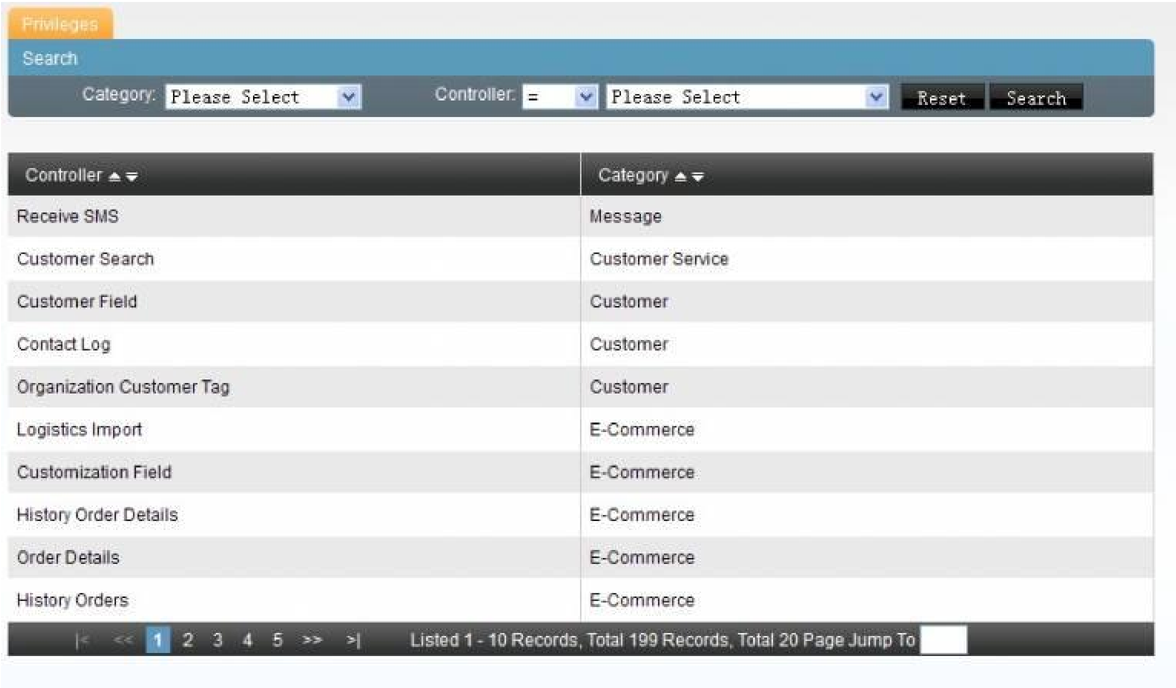


1.7 Privileges

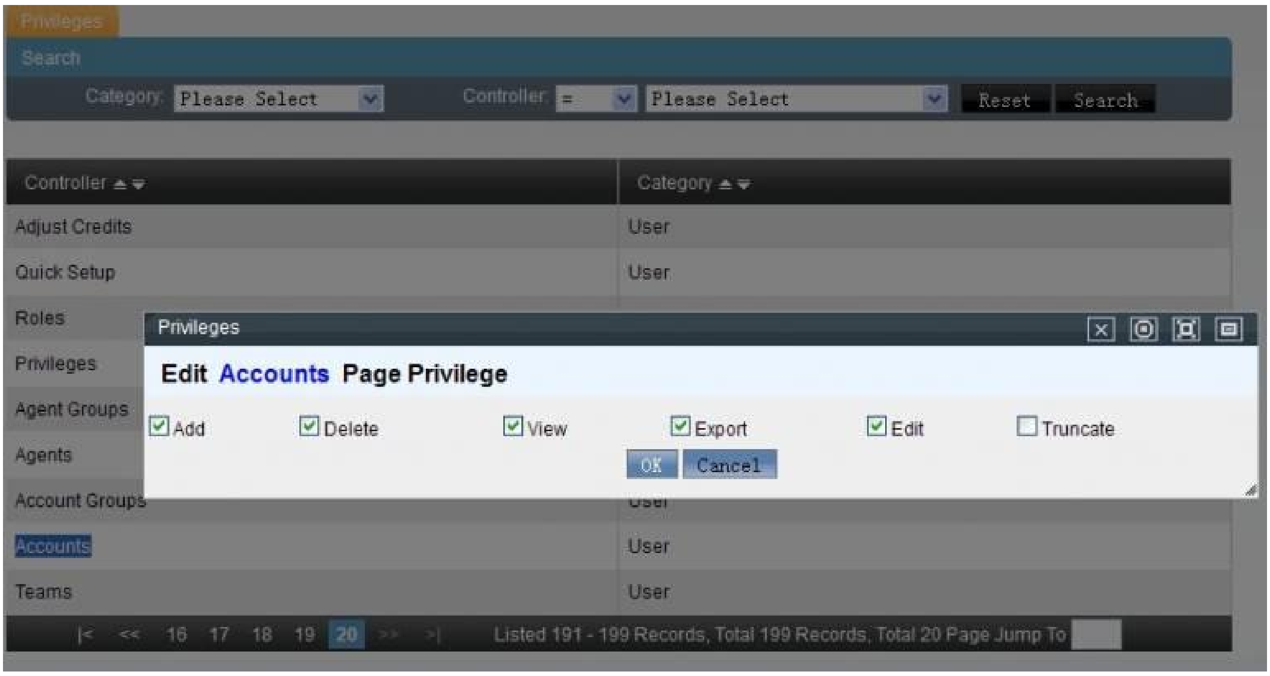
Privilege is used to set the privilege of every module for user.If change the setting here,it will affect the privilege in Role.

Just systemadmin can add or edit the privilege

Click User–>Privilege,open the page,it will show all the page in the list

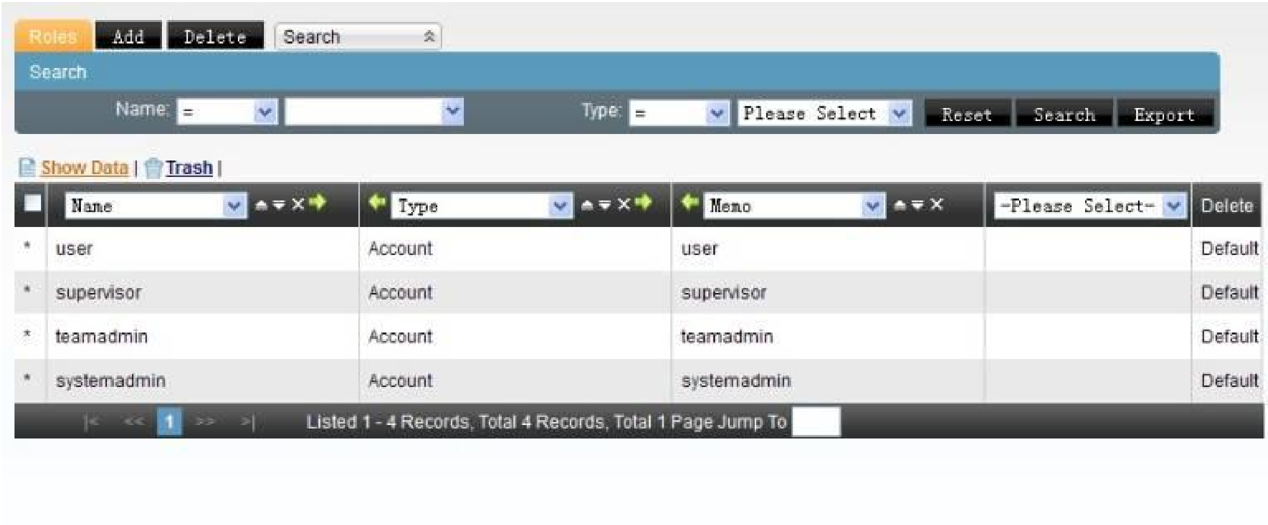


Click the page which you wanna edit,it can show the privilege of page and you can edit the privilege



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

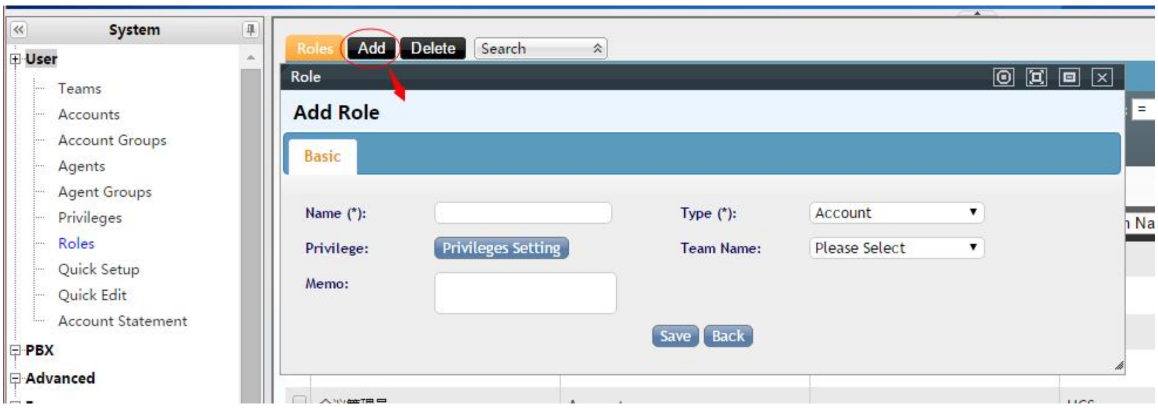


By default, system provides 4 roles

- 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



Mandatory fields

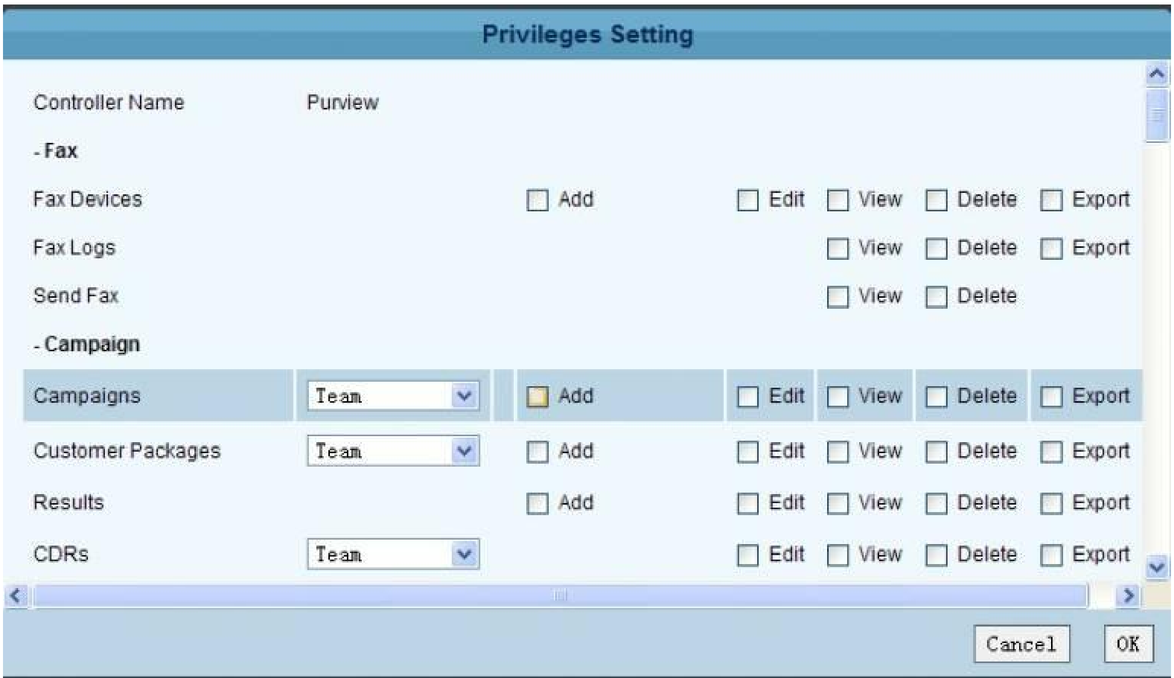
- **Name:** Give it a name to identify it.
- **Type:** Can be Account or agent.
- **Privilege:**

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



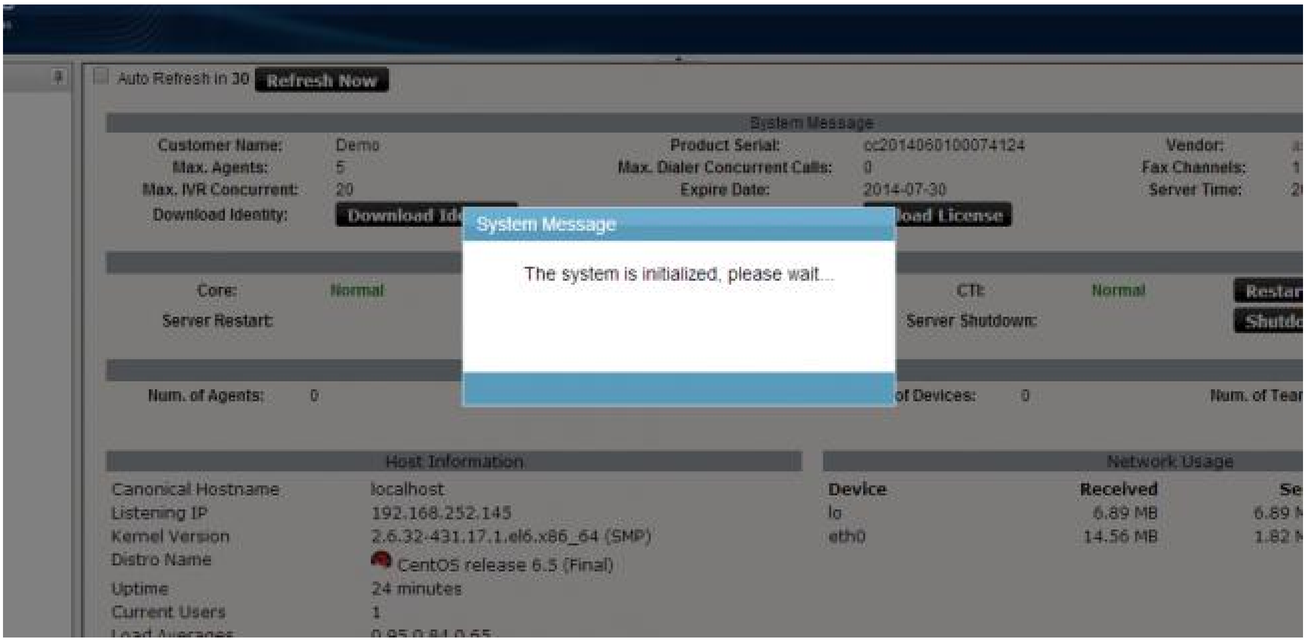
Click the bold font, you can hide or show functions for each modules

1.9 Quick Start

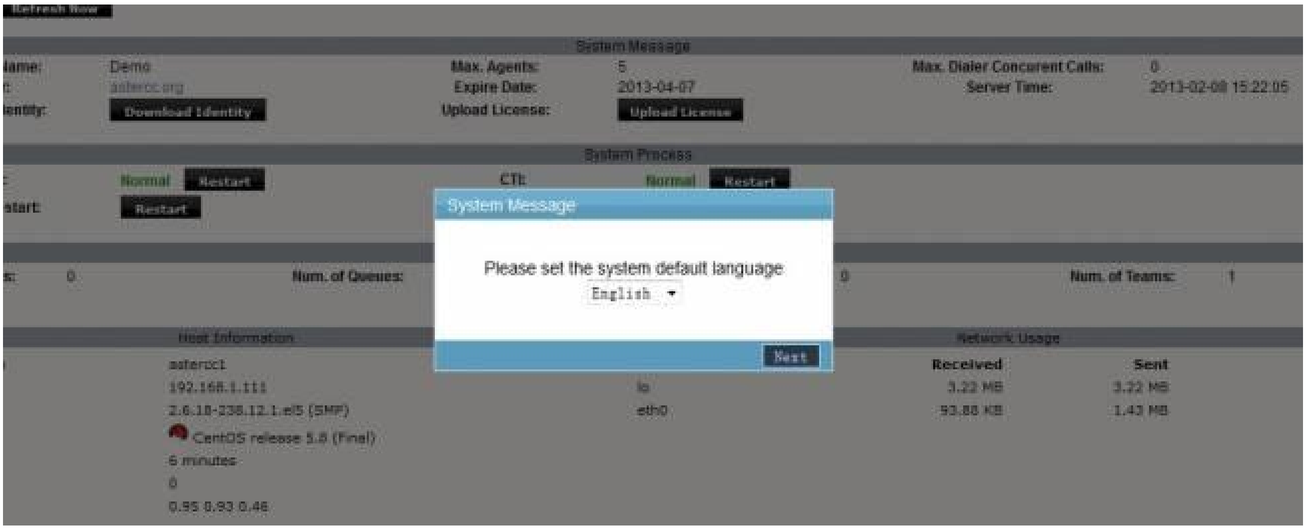
First Login

- After installation, enter the server ip in your broswer, 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.

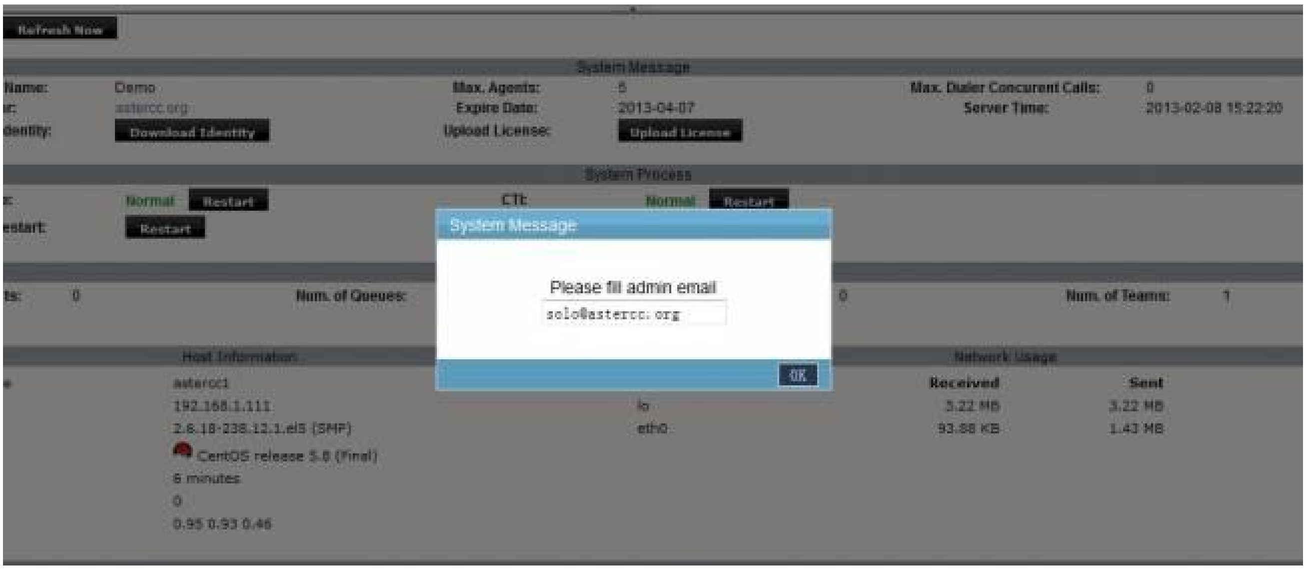
- When it's your first login, it will do initialization



- then it will prompt to select the default language



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



Quick Setup

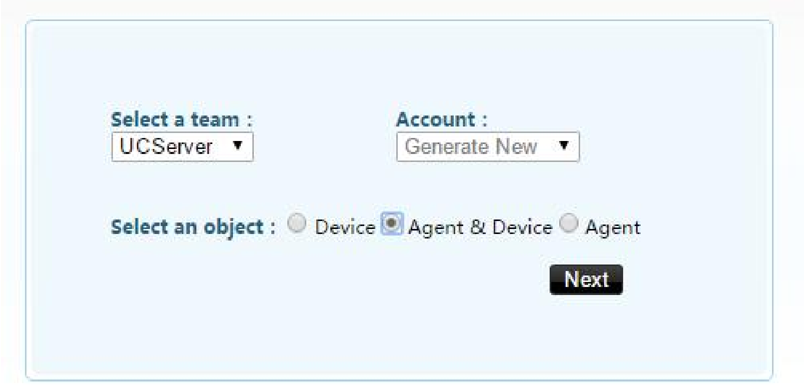
Quick Setup helps to genereate accounts, devices and agents in bulk.

- Logo in as system admin or account admin.
- On the left menu, click [User] → [Quick Setup], go to qucik 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: Creat 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 based on this account.
- Select an Object

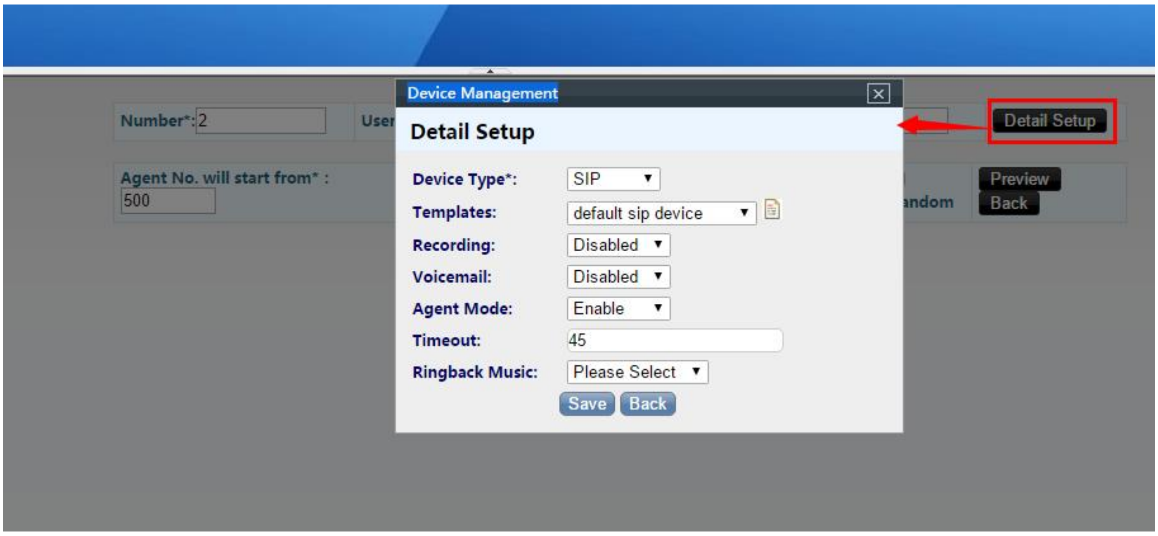
Device: Generate devices only;

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

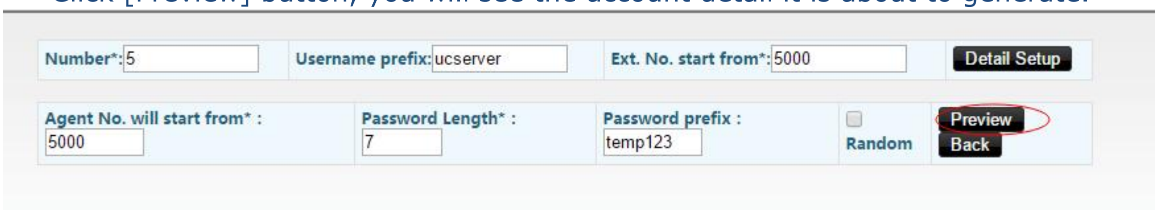
Agent:When agent is not using the system device(extension), please select this option.And you have to sent the phone numbers for the agent under agent management.

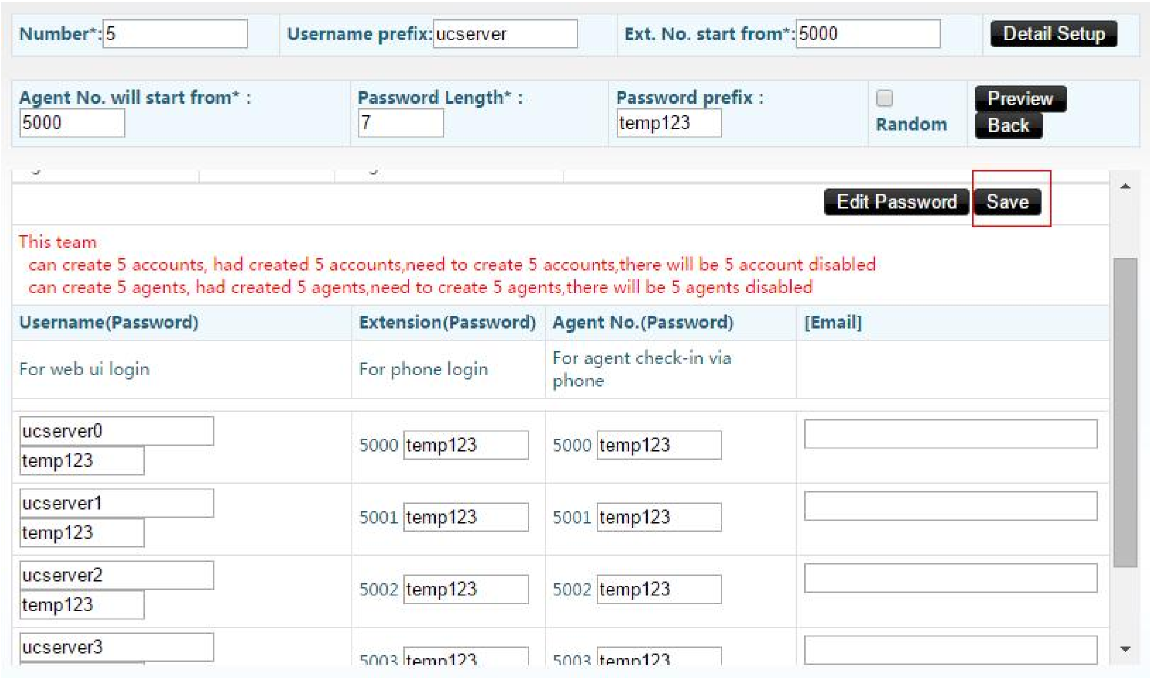


- Click [Next] go to the setup page.
- Number: 5, we will add 5 accounts, devices and agents;
- Username prefix: astercc, all username of the accounts will start from astercc;
- Ext. No. Start from: 5000, all ext. number which we add this time will start from 5000
- Agent No. will start from: 5000, all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

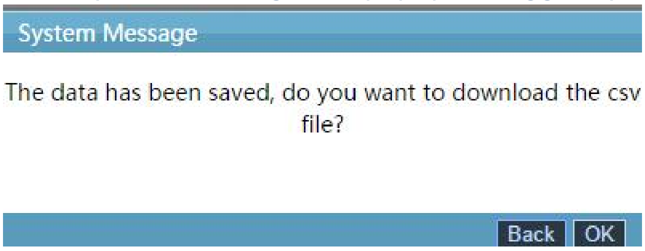


- Click [Preview] button, you will see the account detail it is about to generate.

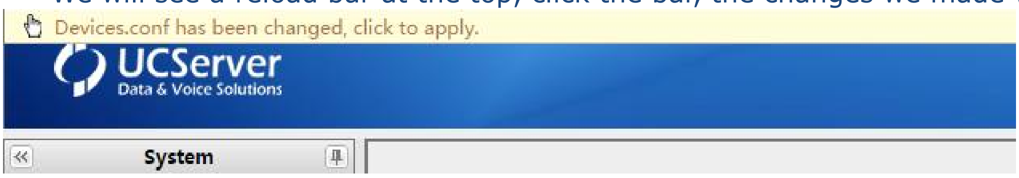




- Click [Save] button, it will generate the accounts, devices and agents.
- A system message will popup to suggest you to download the csv file.



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

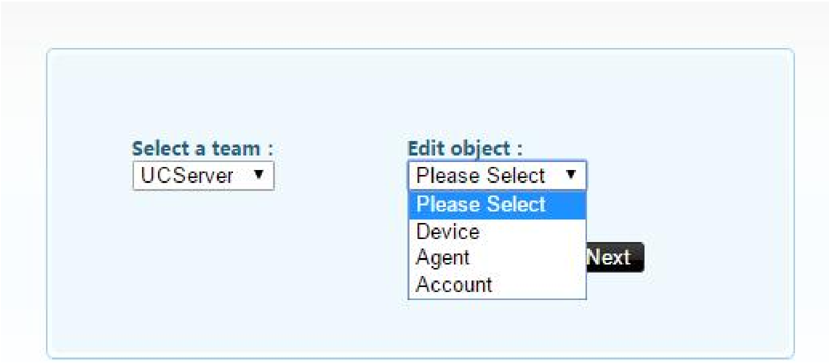


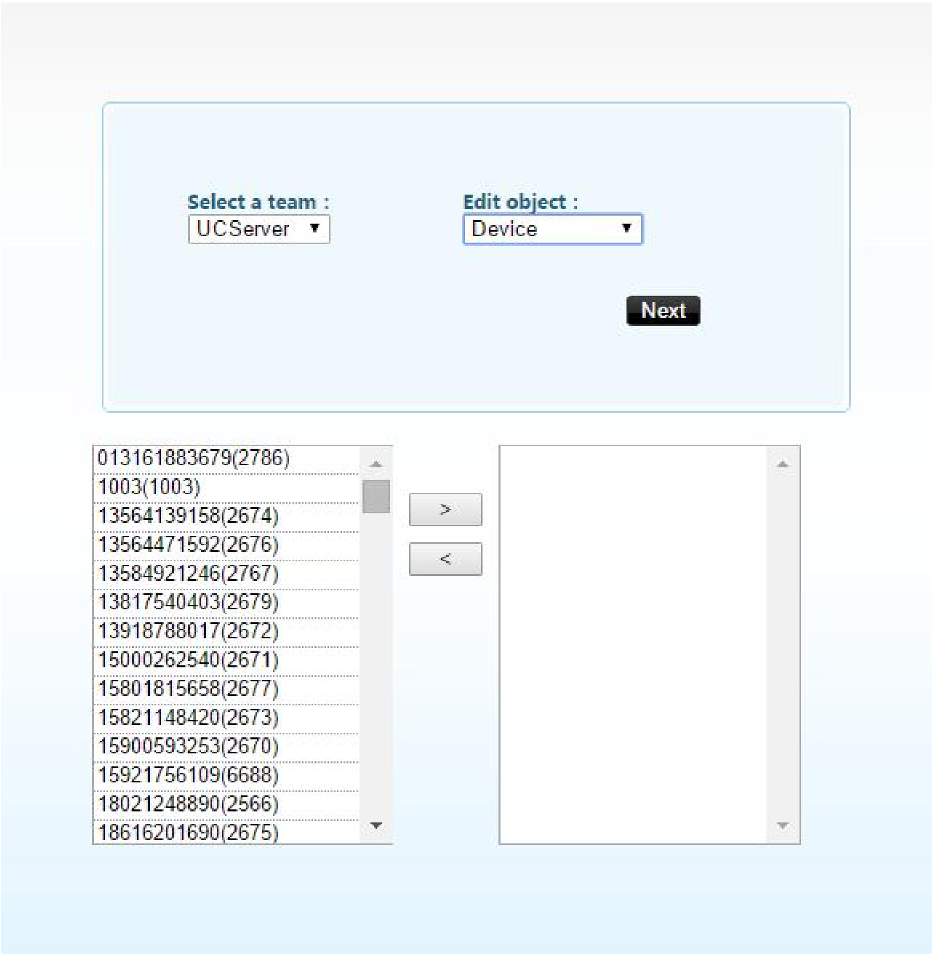
1.10 Quick Edit

Quick endit is for editing objects in bulk.

Choose an object

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

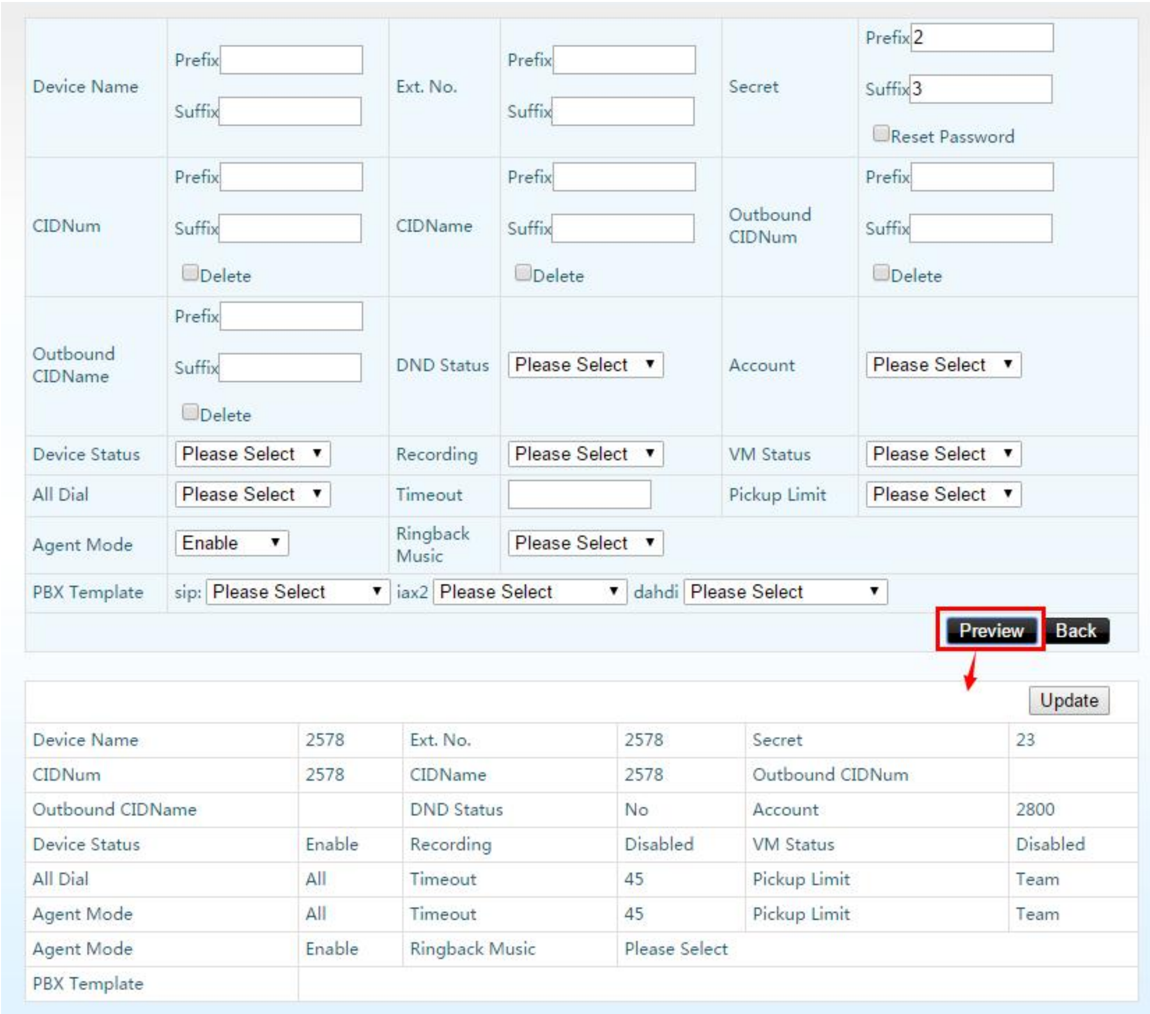




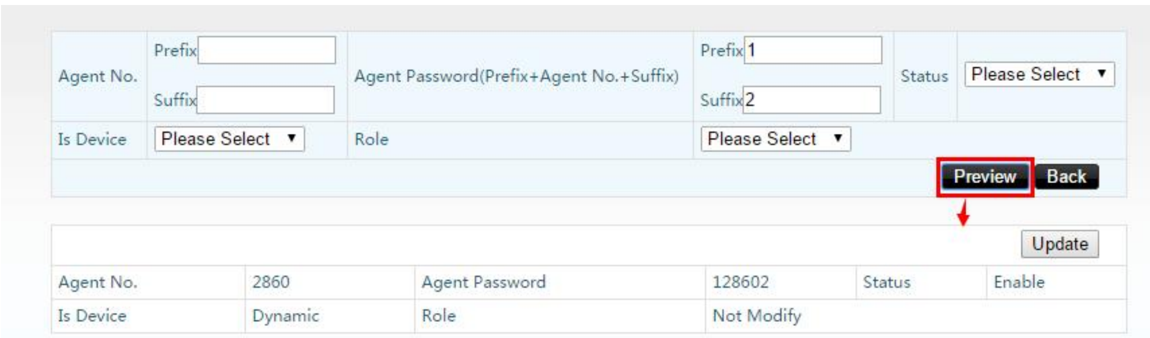
You can use Shift button,
Control button and mouse to do multiselecting.

Edit Device

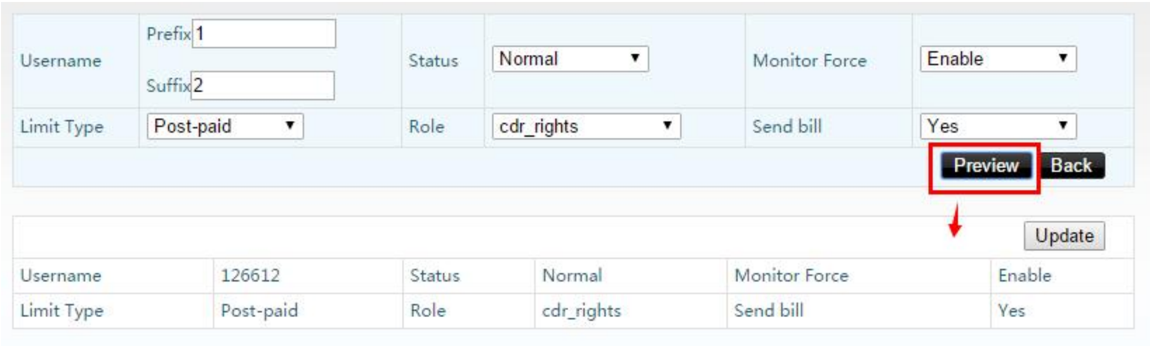
You can mass edit devices name, passwords,CID numbers etc.here. After finished the settings, please click Preview to check the changes.The system will show one device’s settings as an example.



Edit Agent



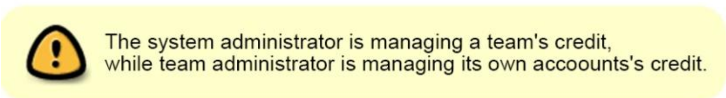
Edit Account



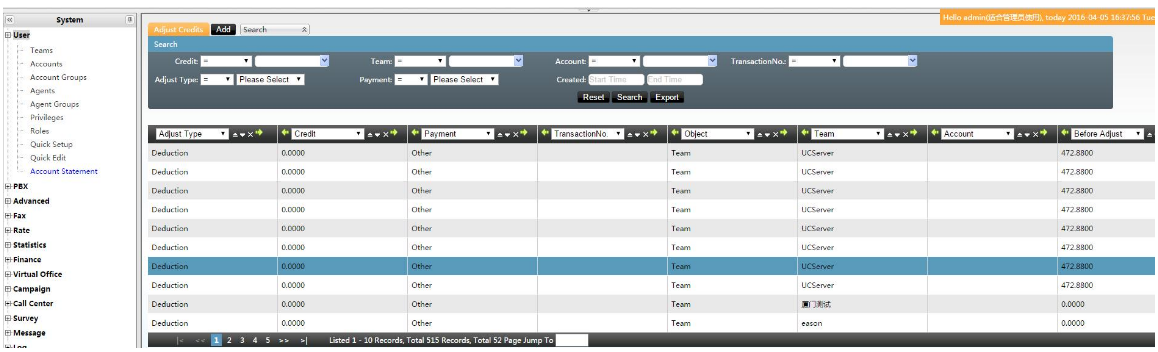
- Prefix: Add prefix for the account
- Suffix: Add suffix for account
- Status:
  - Normal: All the accounts selected will be actived
  - Disable: All the accounts selected will be disable
- Monitor Force:
  - Enable: All the accounts will do recording automatically
  - Disable: All the accounts will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

1.11 Account Statement

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



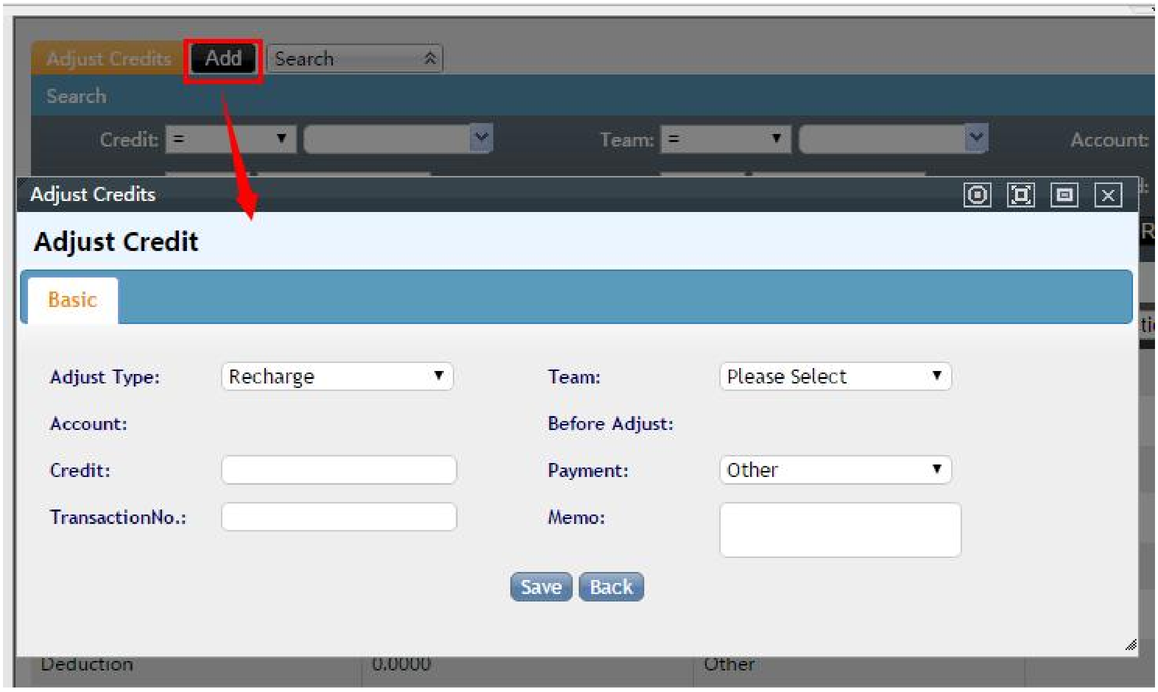
On the left menu,please click Users–>Account Management to open the management page.



Add Account Credit

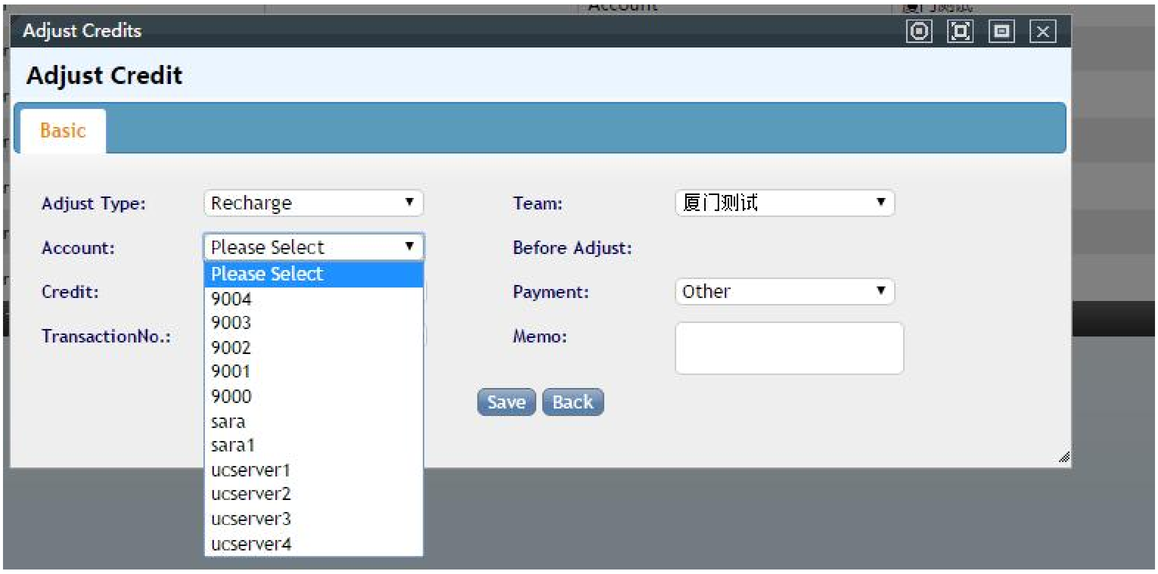
Click【Add】button, the following window will pop up.

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



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

② Logoin 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 logoin as system administrator, choose a team, then ajust its credit.
- If logoin 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

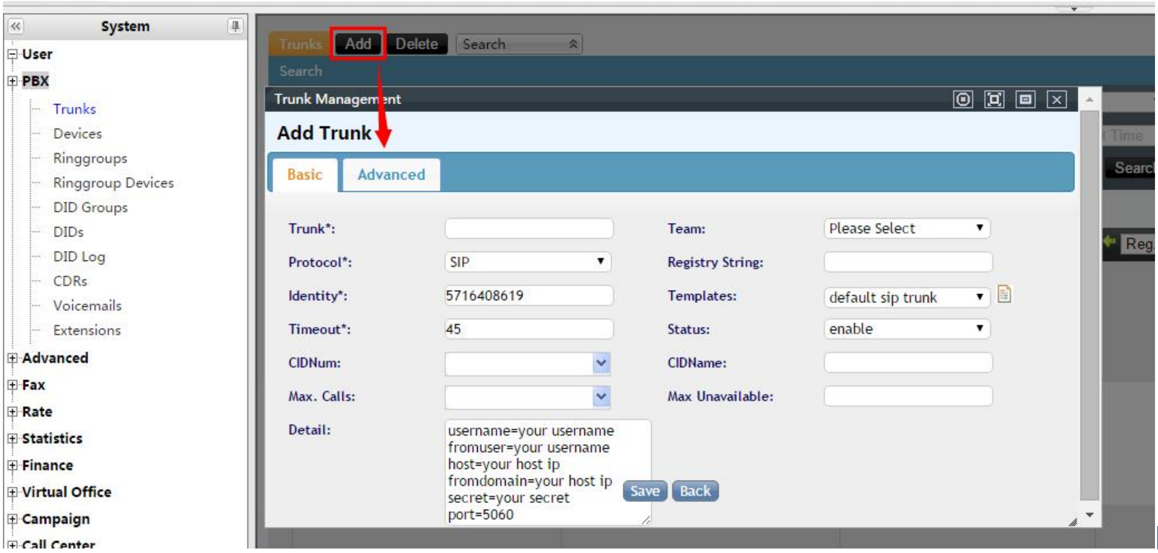
2.1 Trunk

A trunk is a route connecting the local telephone network and other telephone network (mainly the traditionl 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

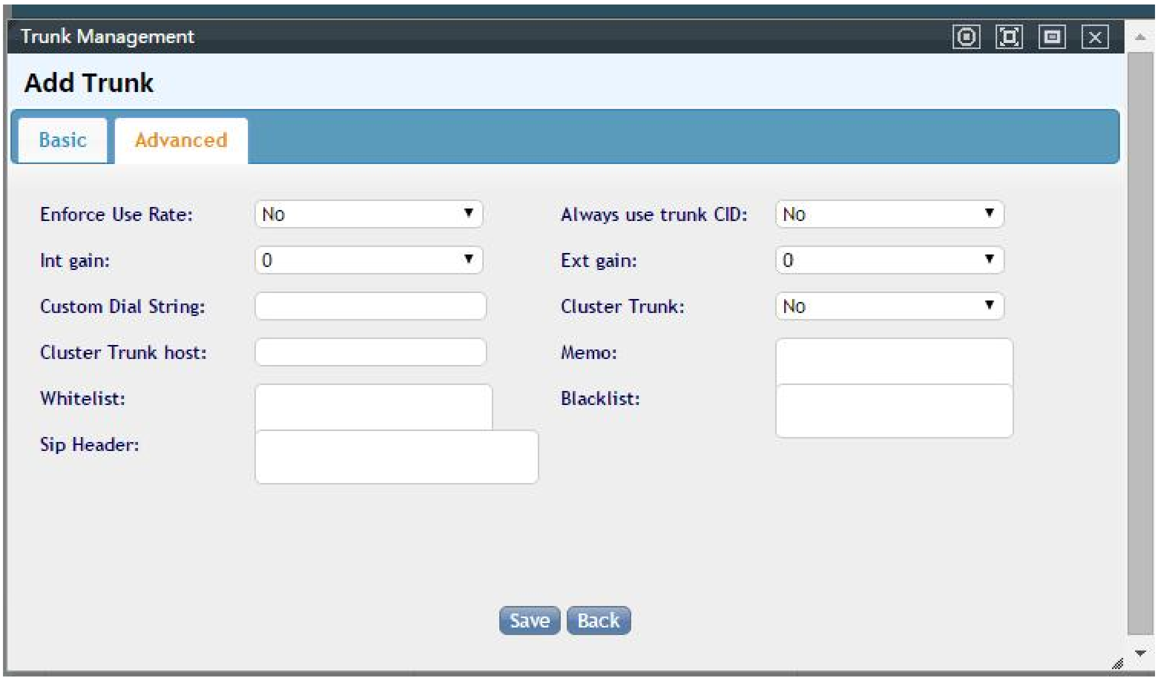
- **Trunk** Set the name for the trunk for identification.
- **Team** Selece a team to which this trunk belongs. And after setting, this trunk can only be used in this team. If you do not assign this trunk a team, then all teams can use this trunk.
- **Protocol** Choose a protocol for this trunk.
- **Registry 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

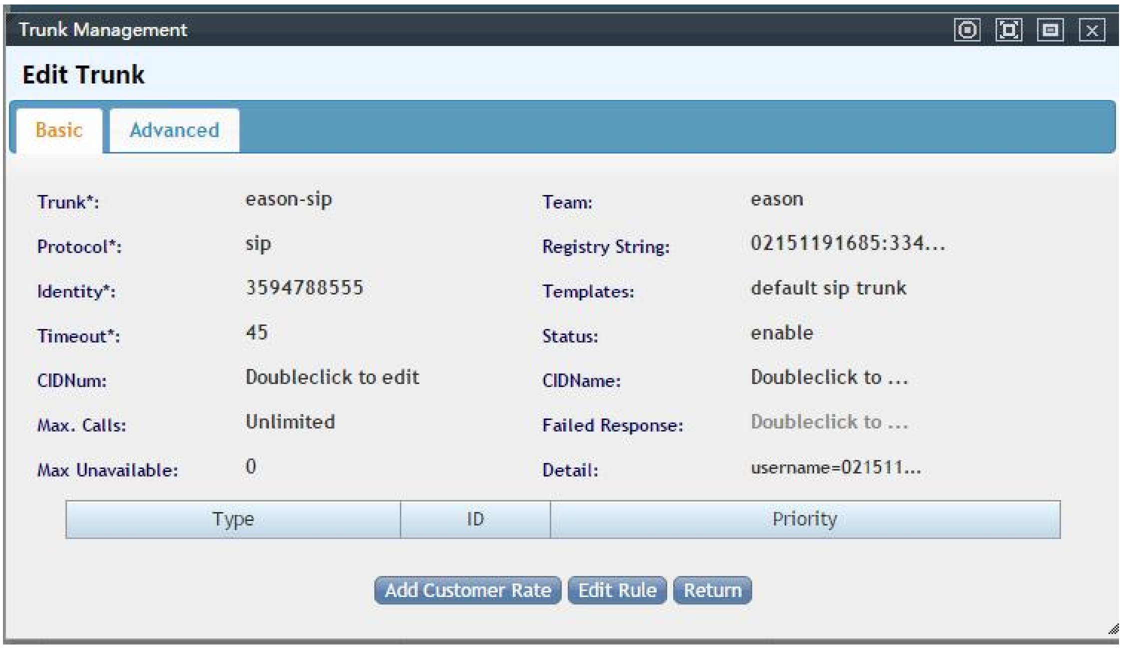
Advanced



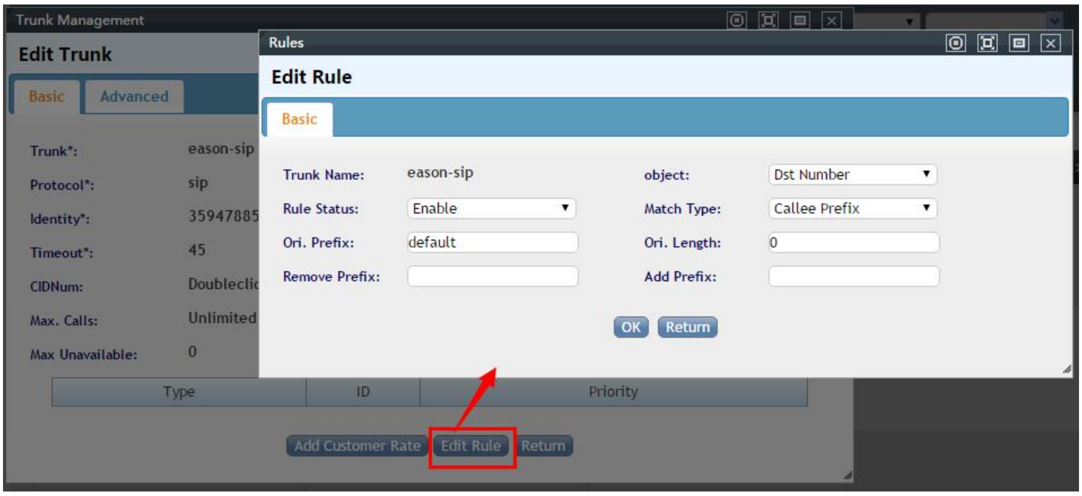
- **Enforce use rate**: When system try make a call via this trunk, it would try match a device rate of the trunk. If you use the enforce rate, you can't dial out if it failed to match a rate, if this option is not set to yes, system can dial out event no device rate match.
- **Always use trunk CID**: 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.



Click [Edit rule] to open the trunk rule editer



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, Calleriid 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.

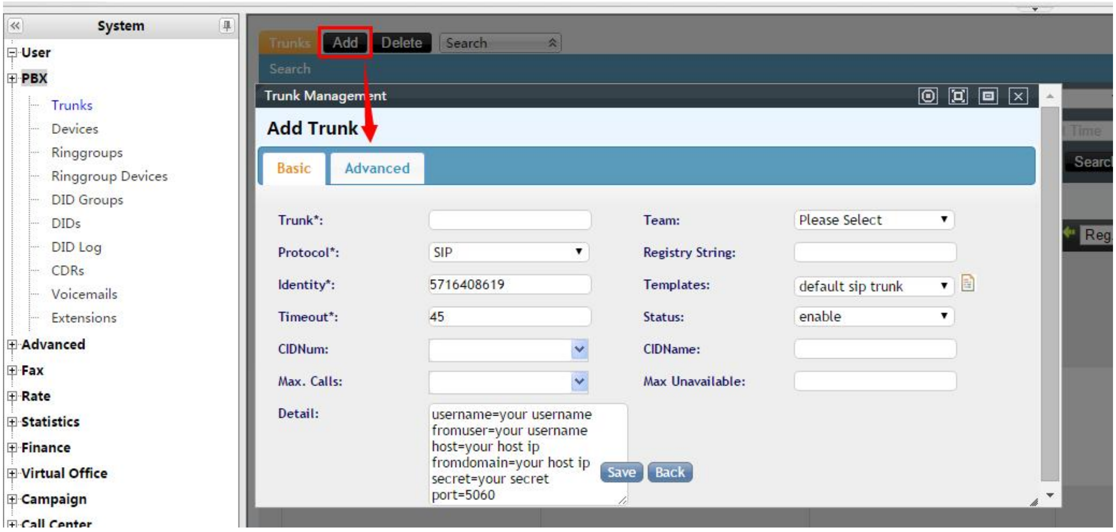
Remove prefix: When the number matches, the prefix you entered will be removed.

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

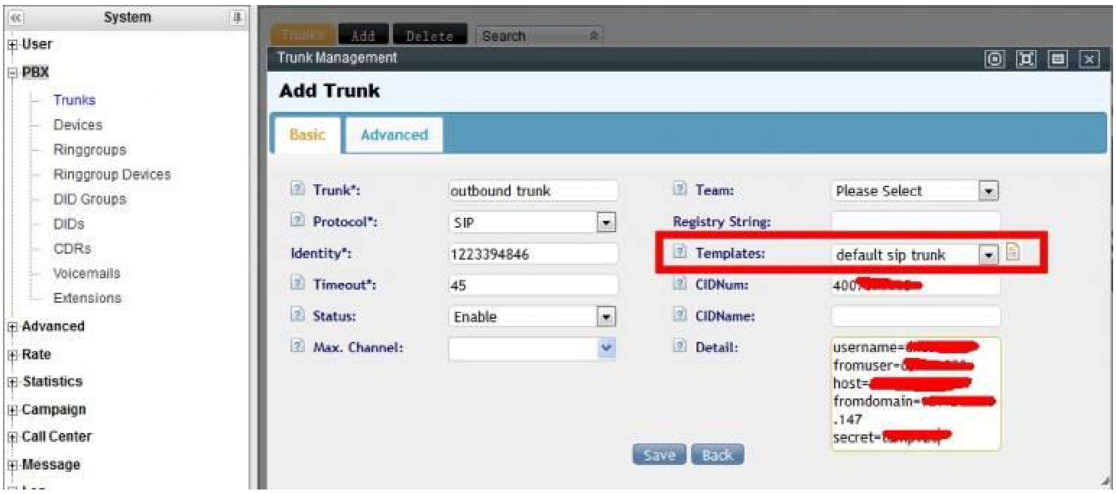
Click [save] after finishing the rule set, and the new information will be displayed on the table on the bottom.

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

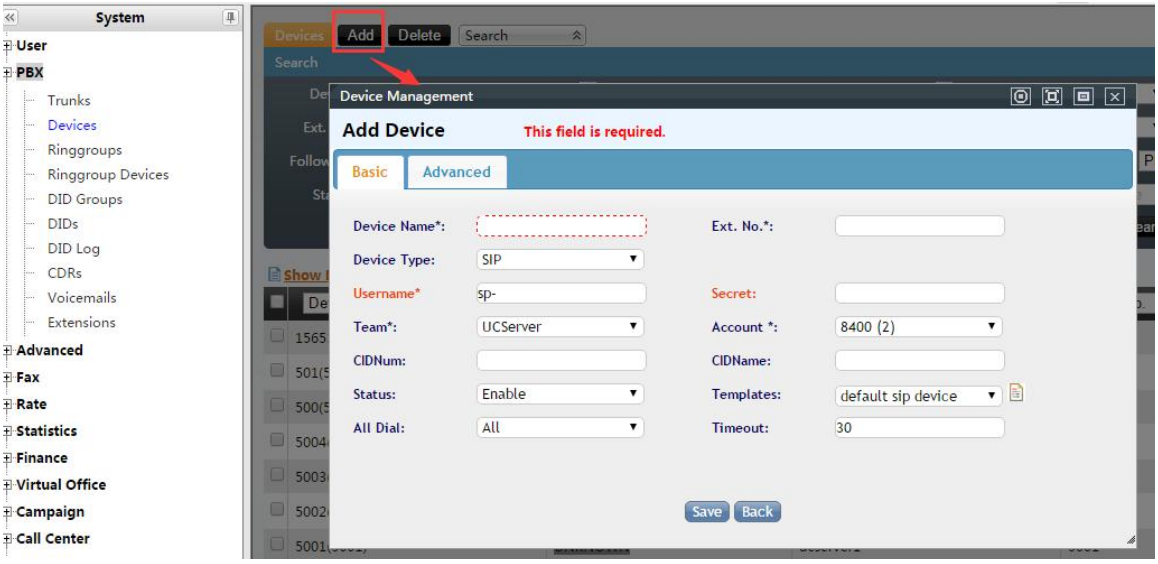
This is used to manage all devices in the system, devices including:

- (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.



Rquired 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 fomat 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 delongs 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

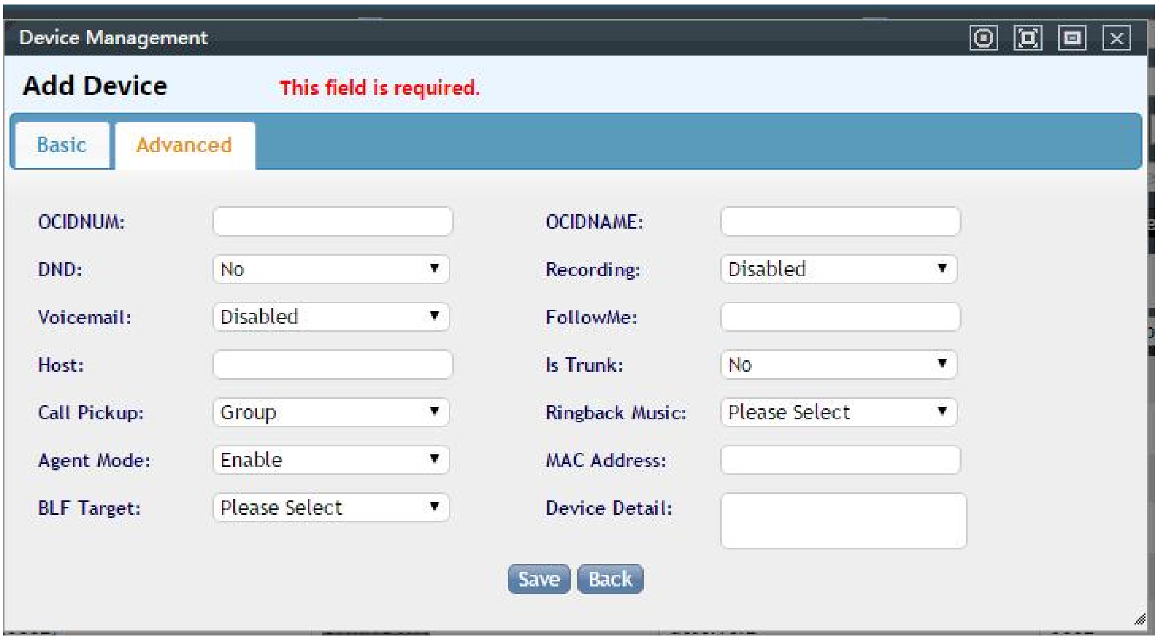
- **Status**：Whether to enable this device
- **Template**：The parameter template the device uses. Using template can help us batch adjust the parameter of devices quickly;
- **Allow dial**：Whether allow the device to dial the number outside the system.

> 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.

Advnced

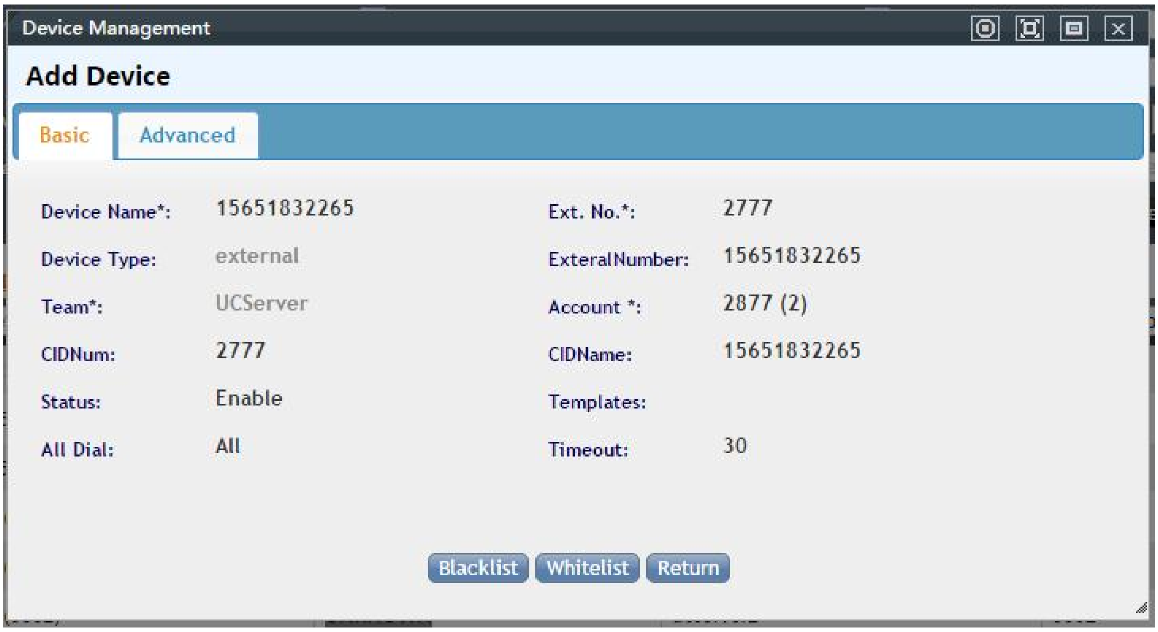


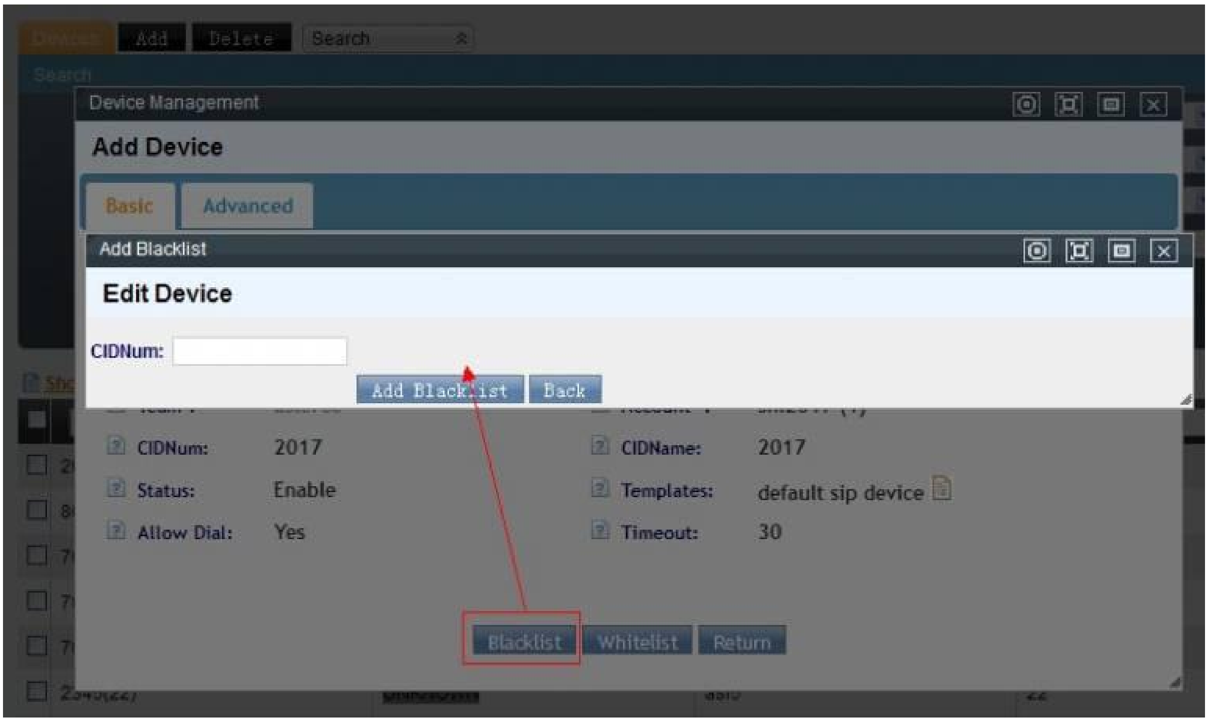
- **OCID NUM**：Set the OCID number (outside calls);
- **OCID Name**：Set the OCID name (outside lines, only support IP lines);

- **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**

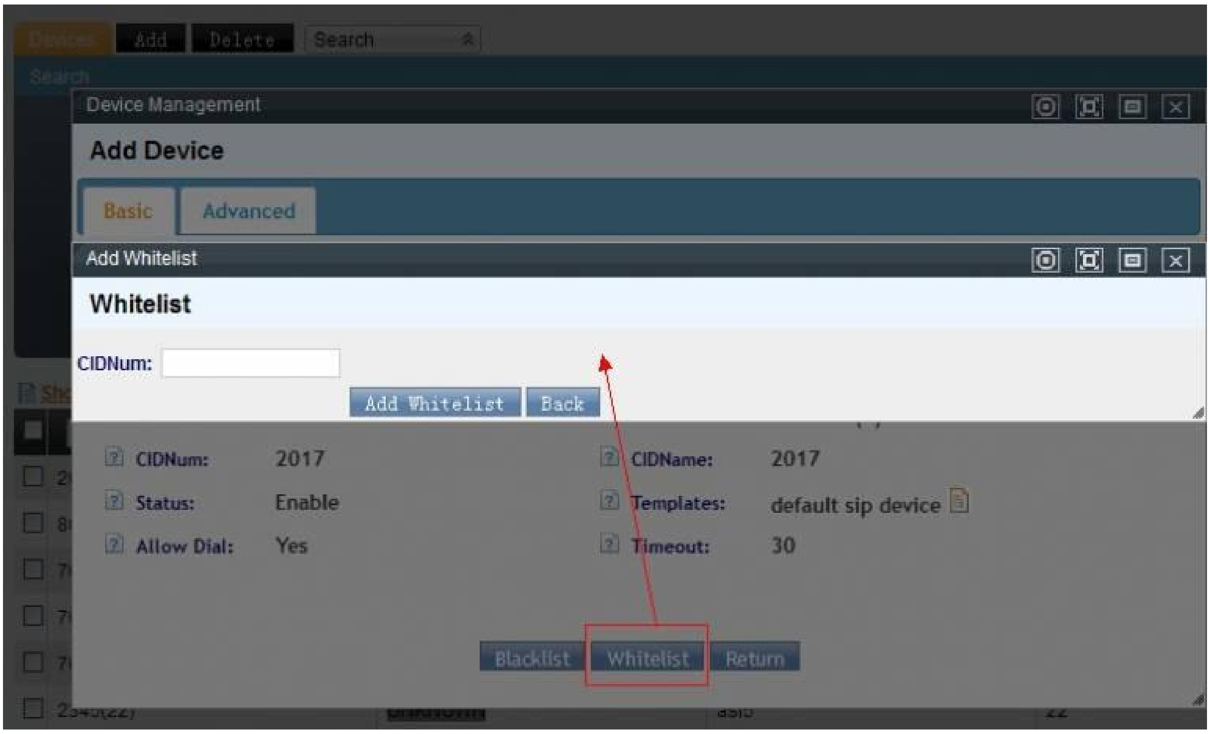
Edit the device

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





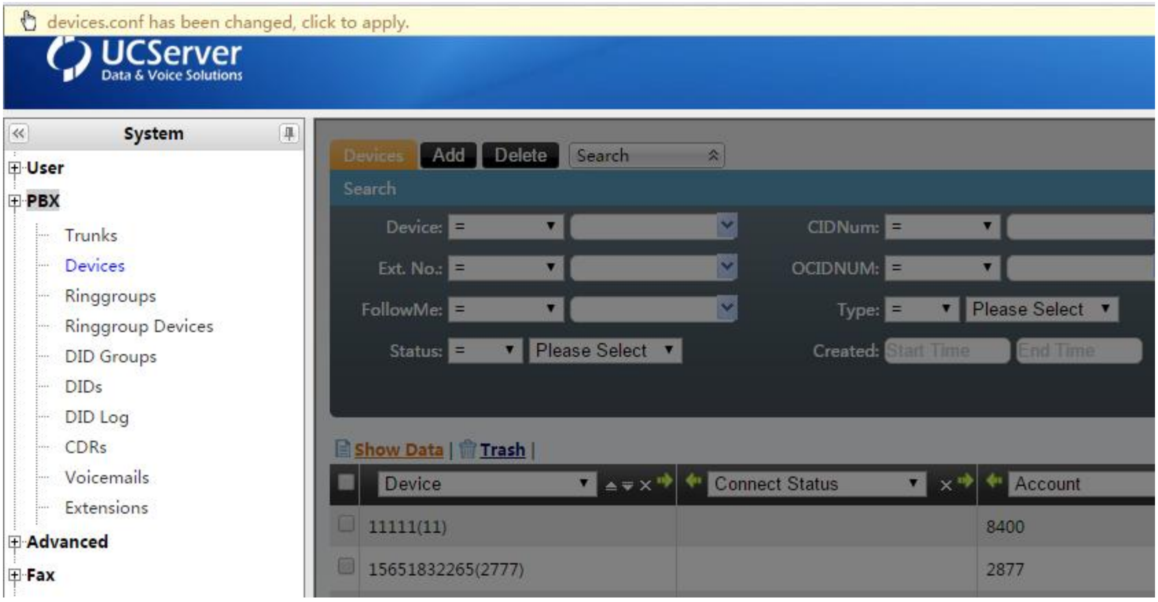
- Black list: set a list of numbers which are not able to get through to this device.



- 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.



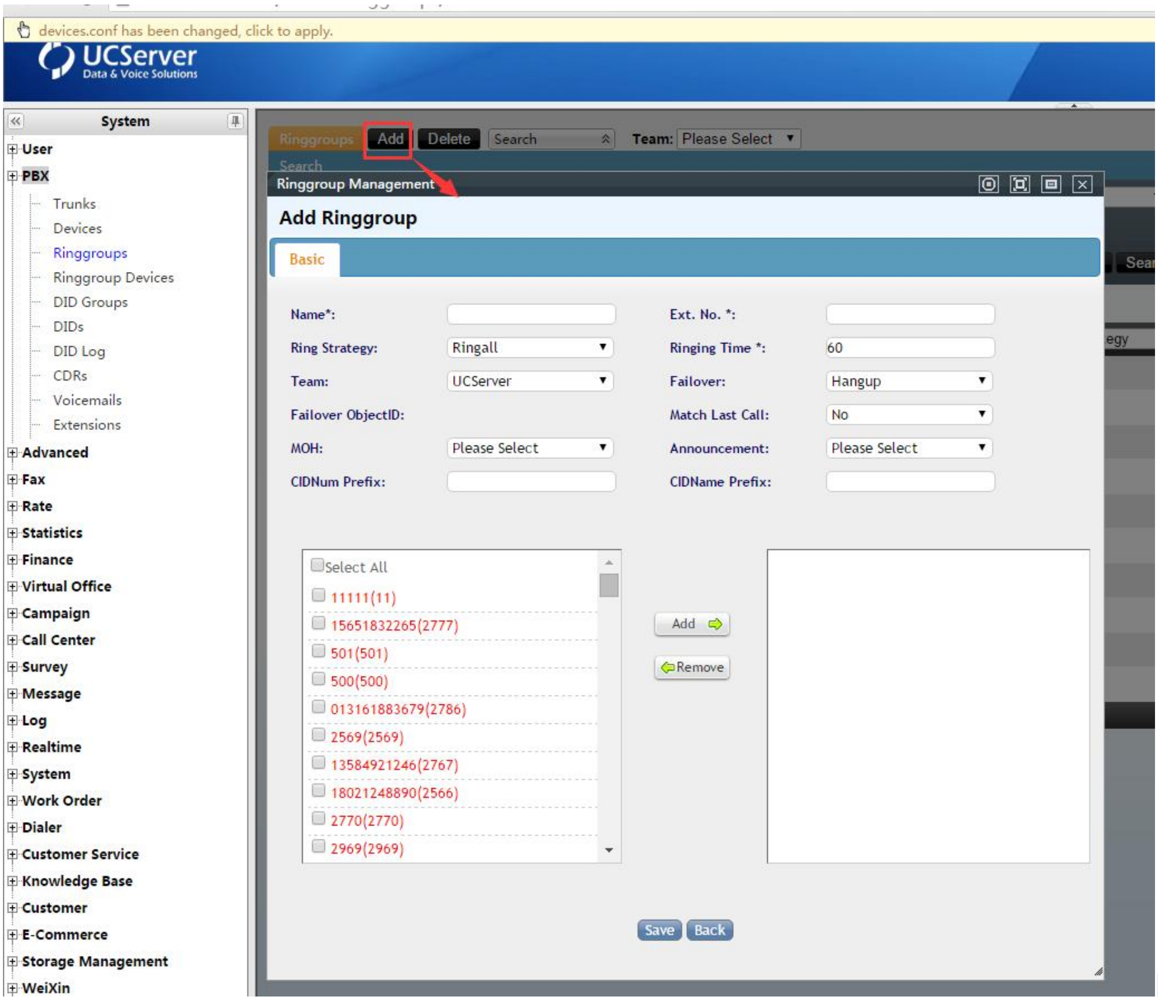
2.3 Ring Group

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.

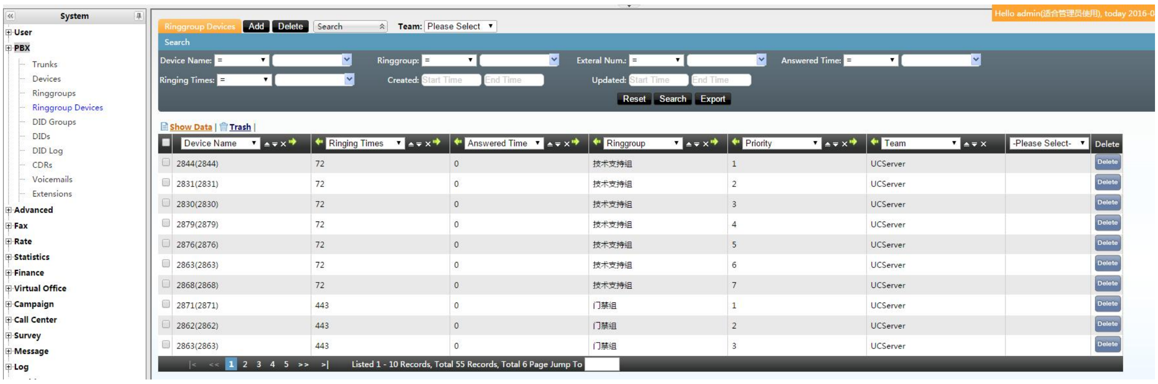
Optional fields

- **Annoucement**：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,Extession,Ringgroup,Voicemail,Busy)

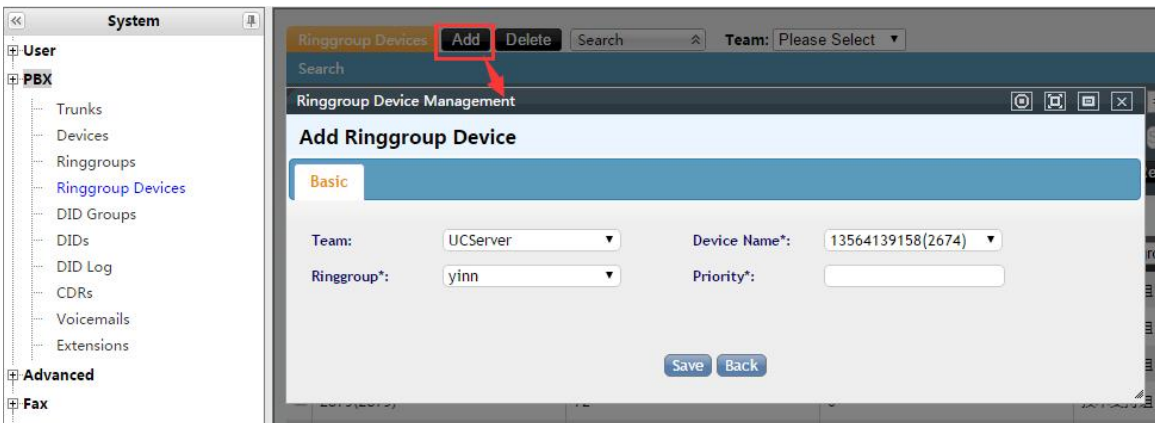
2.4 Ringgroup Devices

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.



Add ring group device

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

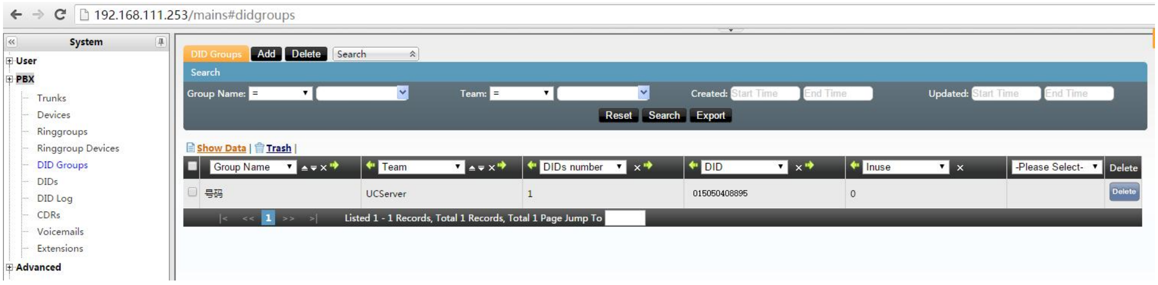


Required fields

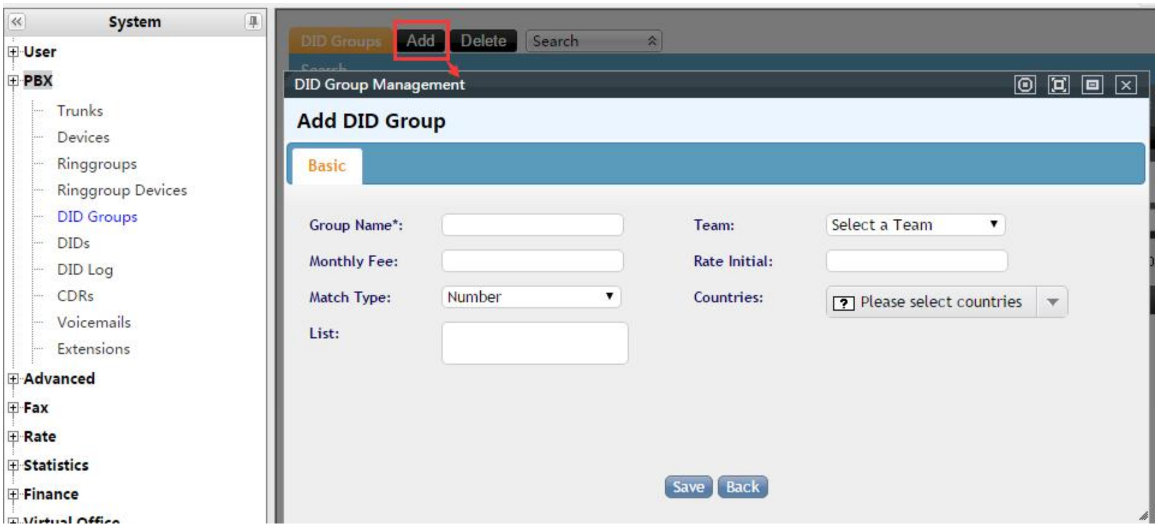
- **Team**: Select the team which the device to be set belongs to
- **Device name**: Choose a device in this team
- **Ringgroup**: Choose a group you want the device to be assigned to
- **Priority**: Set the priority level of the ring group, enter 0-9, the larger the number, the higher the priority. (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:

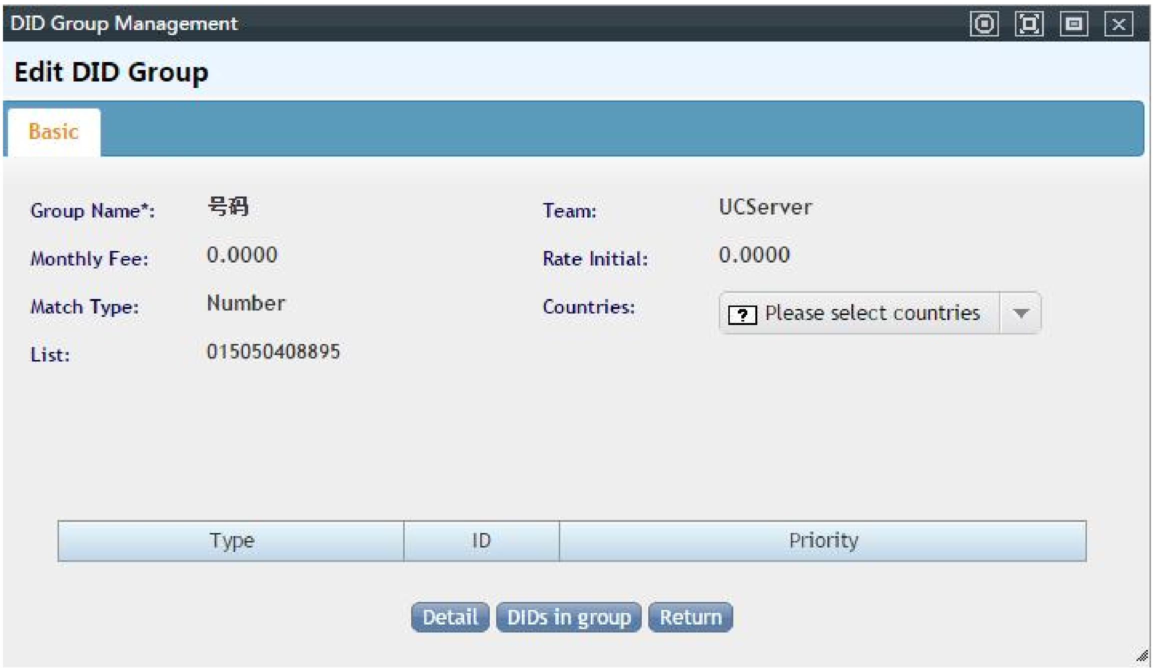
Rate Initial:

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

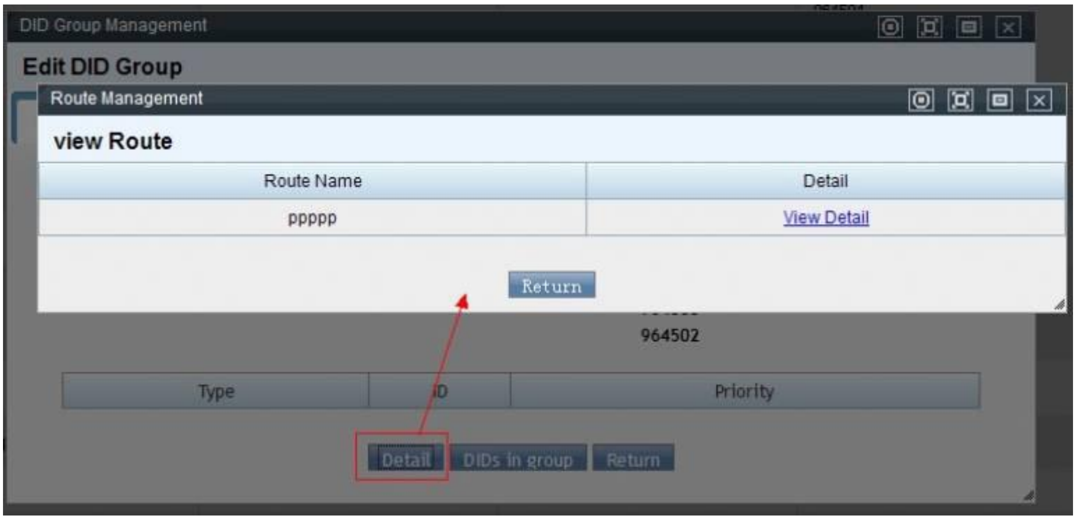
Countries:

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.



Click Detail to open the following window



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.

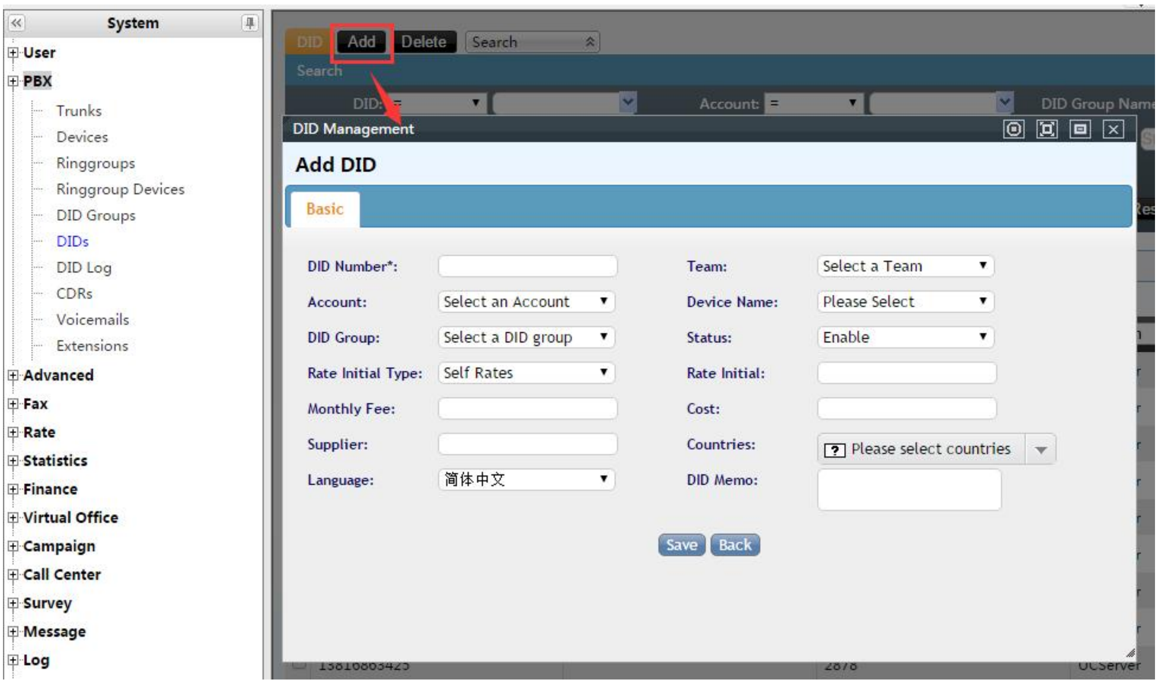
Click DIDs in group and the browser will pop up a new tab to show all the DIDs under this group, this can be used for searching DID in the DID page.

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,



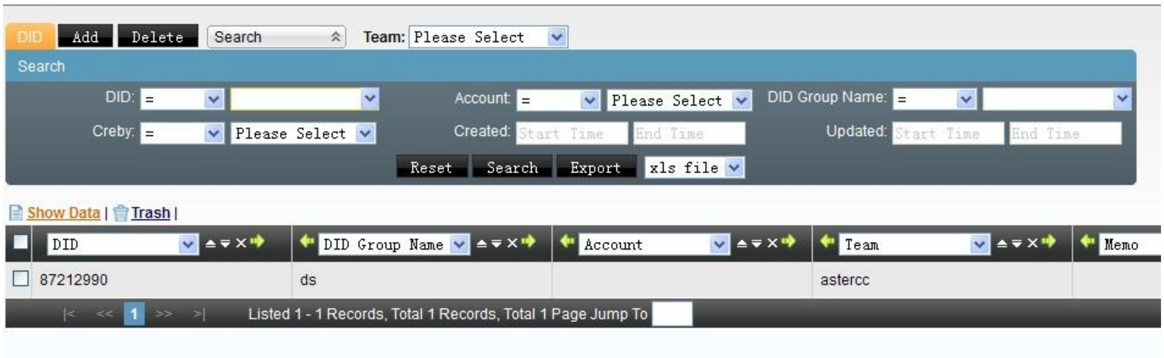
Required fields

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

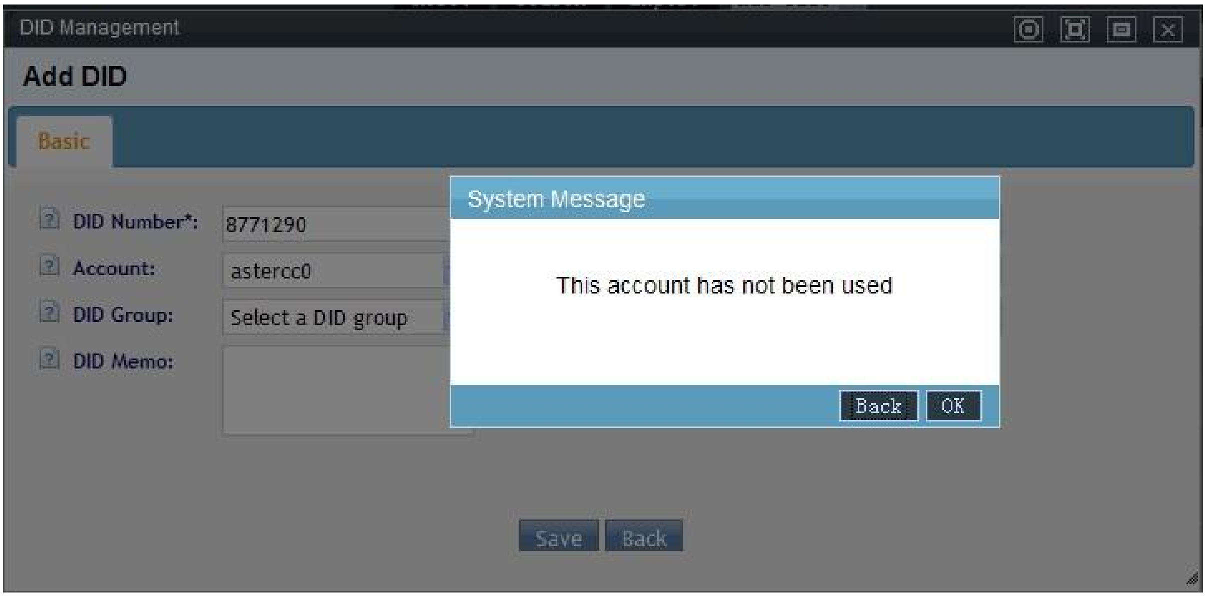
Optional fields

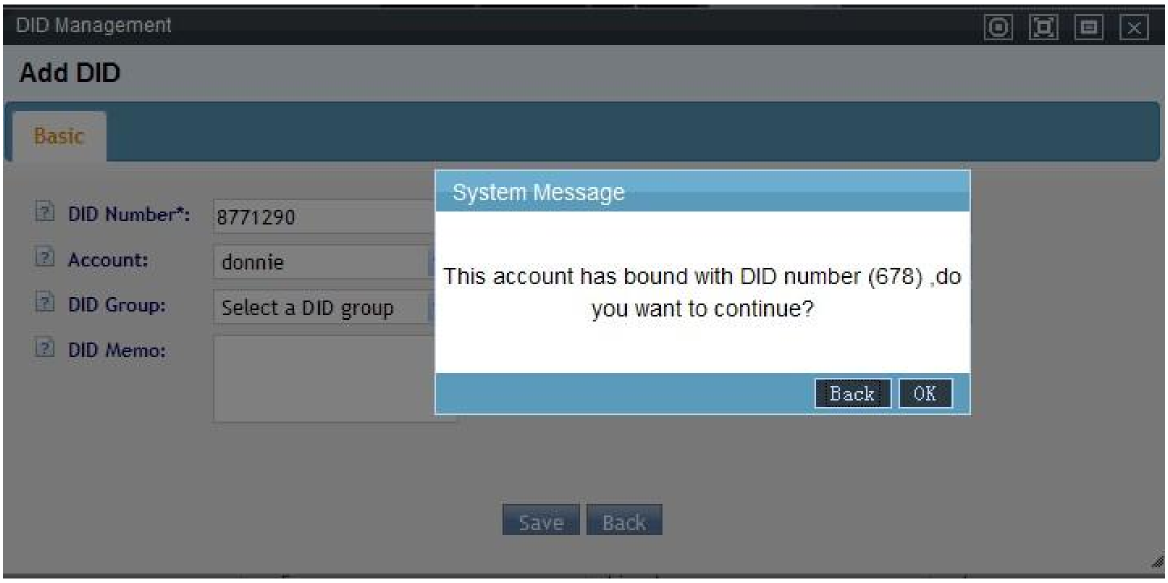
- **Account**：Which account this DID number is using (after selecting, all of the devices under this account will be listed)
- **Device name**：In the account you have chosen, pick a device, and after that, when the DID is dialed, the system will automatically route the call to this device without the 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



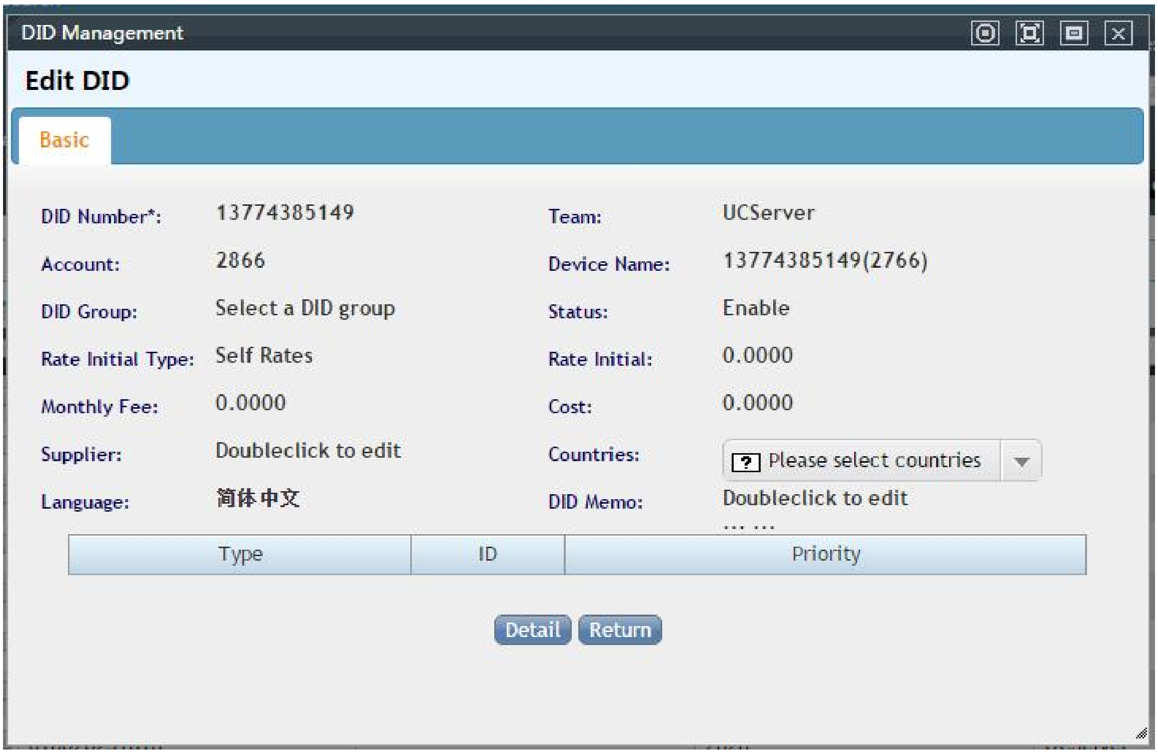
- When the DID is assigned to an account, the system will automatically check whether other DID has been binded with this account. And differnet instructions will show up to avoid the mess that one account is binded with multiple DID.



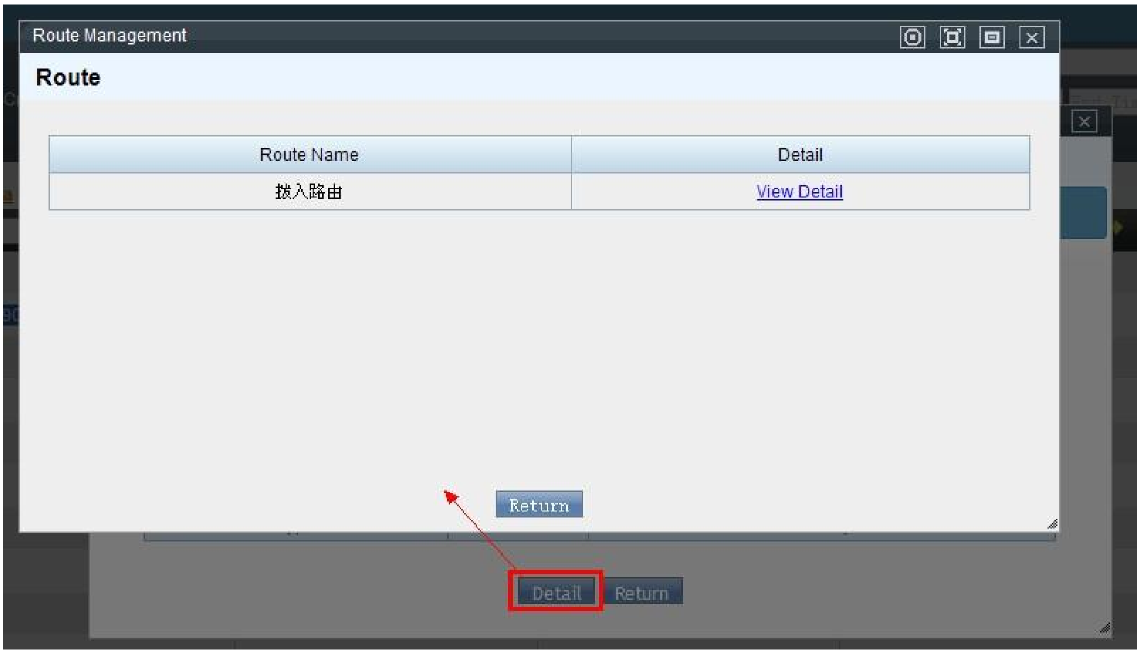


Edit DID

Double click the item to open the DID editing window.

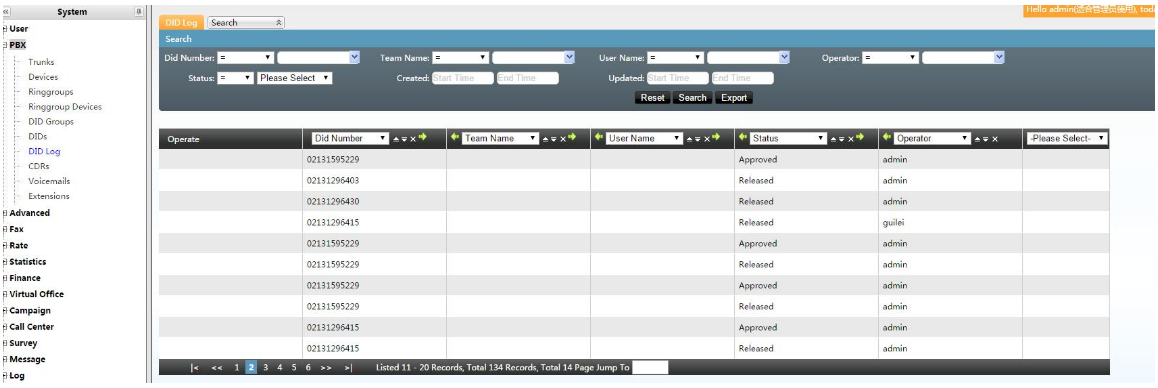


Click **[Detail]** to see the condition of DID in the incoming route.



2.7 DID Log

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

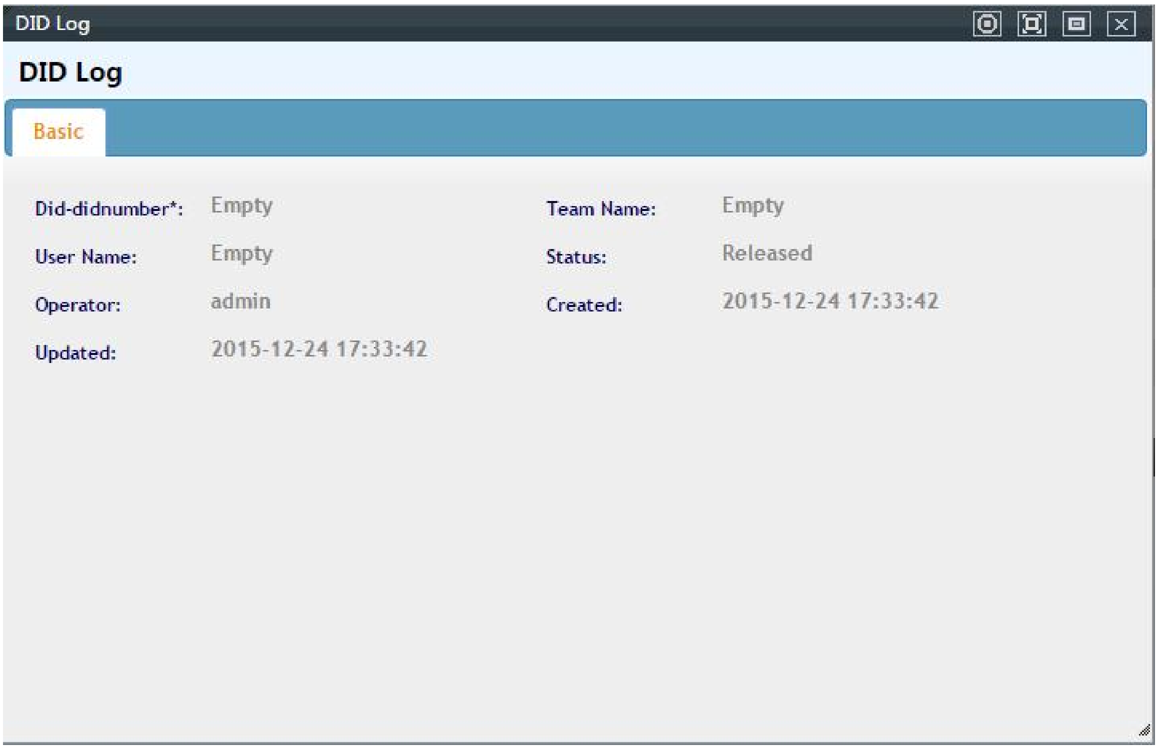


Module Function: It is for checking all the calling log.

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

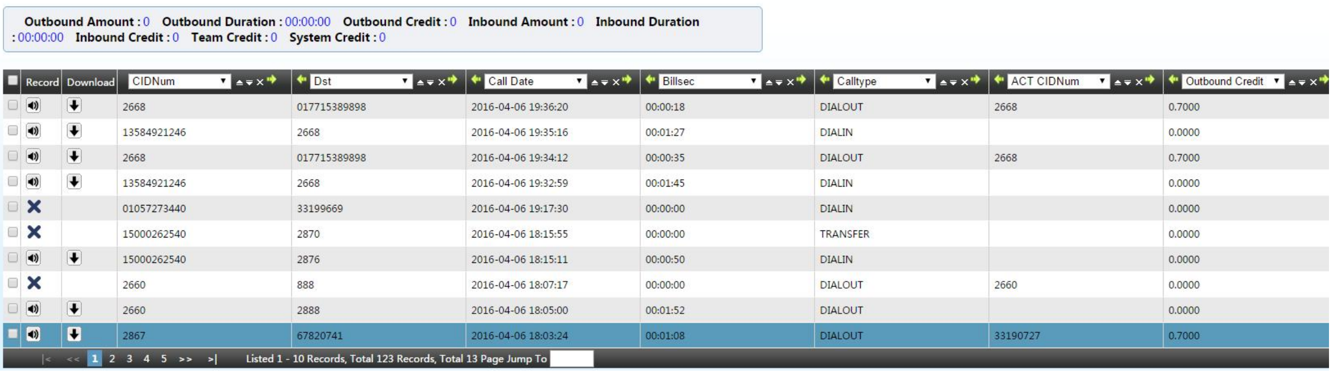
Clickto download the call record.

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



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
		2668	017715389898	2016-04-06 19:36:20	00:00:18	DIALOUT	2668	0.7000
		13584921246	2668	2016-04-06 19:35:16	00:01:27	DIALIN		0.0000
		2668	017715389898	2016-04-06 19:34:12	00:00:35	DIALOUT	2668	0.7000
		13584921246	2668	2016-04-06 19:32:59	00:01:45	DIALIN		0.0000
		01057273440	33199669	2016-04-06 19:17:30	00:00:00	DIALIN		0.0000
		15000262540	2870	2016-04-06 18:15:55	00:00:00	TRANSFER		0.0000
		15000262540	2876	2016-04-06 18:15:11	00:00:50	DIALIN		0.0000
		2660	888	2016-04-06 18:07:17	00:00:00	DIALOUT	2660	0.0000
		2660	2888	2016-04-06 18:05:00	00:01:52	DIALOUT		0.0000
		2867	67820741	2016-04-06 18:03:24	00:01:08	DIALOUT	33190727	0.7000

|< << 1 2 3 4 5 >> >| 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 delate the call record.

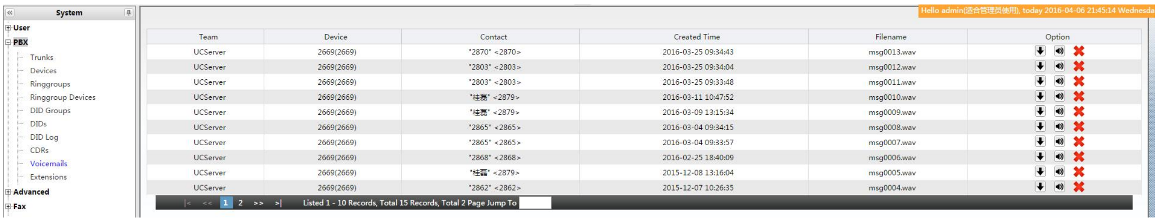
Double click an item to see the details of the call.

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,



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;

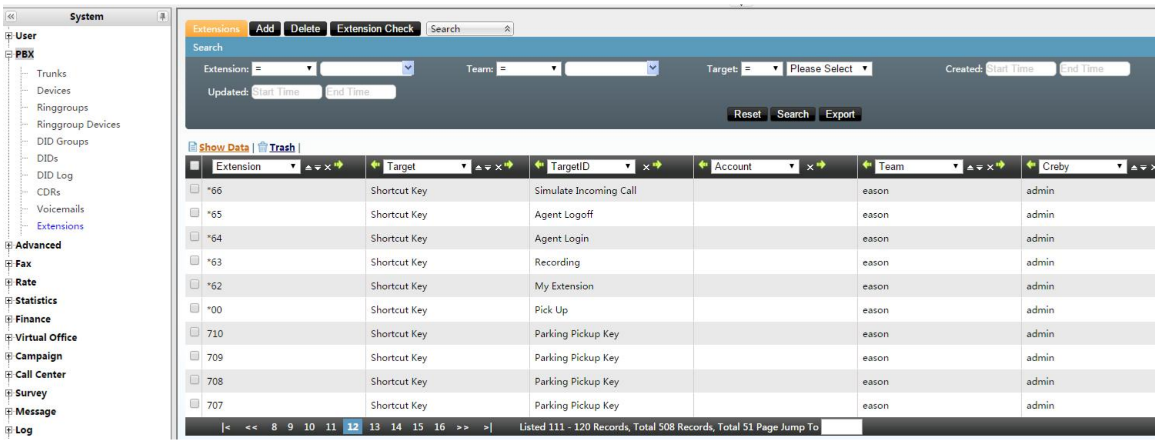
Click to delete the message.

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

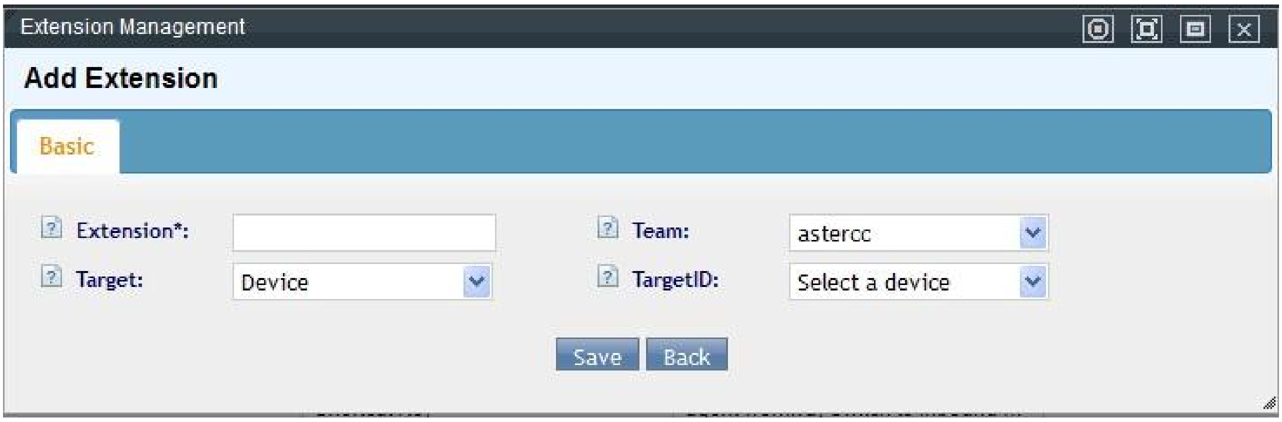
when you select Templpate in Team→ Advanced, VM Sender, and when the system gets new voicemail, it will be sent to the set email address of the device as an email.

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.

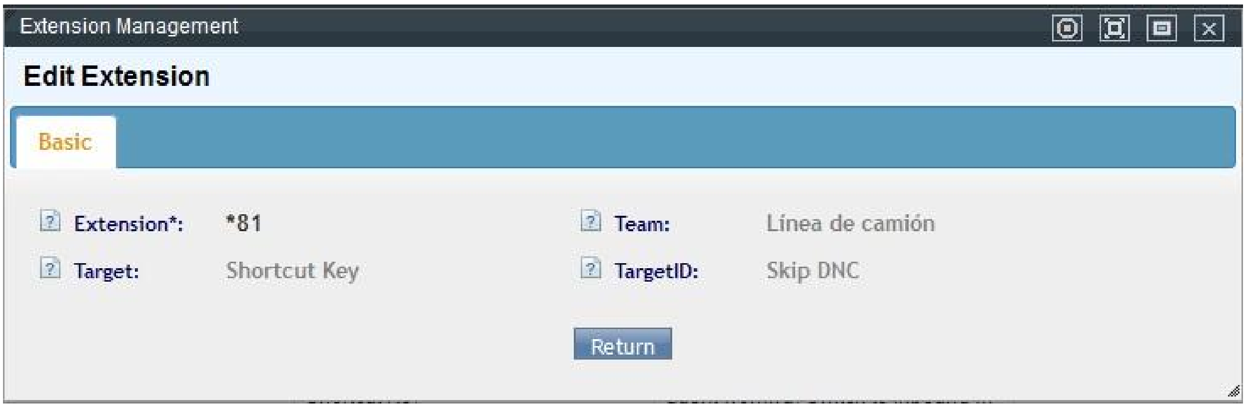
Extension	Target	Target ID	Account	Team
707	Shortcut Key	Parking Pickup Key		Línea de camión
706	Shortcut Key	Parking Pickup Key		Línea de camión
705	Shortcut Key	Parking Pickup Key		Línea de camión
704	Shortcut Key	Parking Pickup Key		Línea de camión
703	Shortcut Key	Parking Pickup Key		Línea de camión
702	Shortcut Key	Parking Pickup Key		Línea de camión
701	Shortcut Key	Parking Pickup Key		Línea de camión
700	Shortcut Key	Parking Key		Línea de camión
*90	Shortcut Key	Forward All Cancel Key		Línea de camión
*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 corrsponding module, and you can delete the data in that page.

Double click the item to enter the edit page.



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

3. Advanced

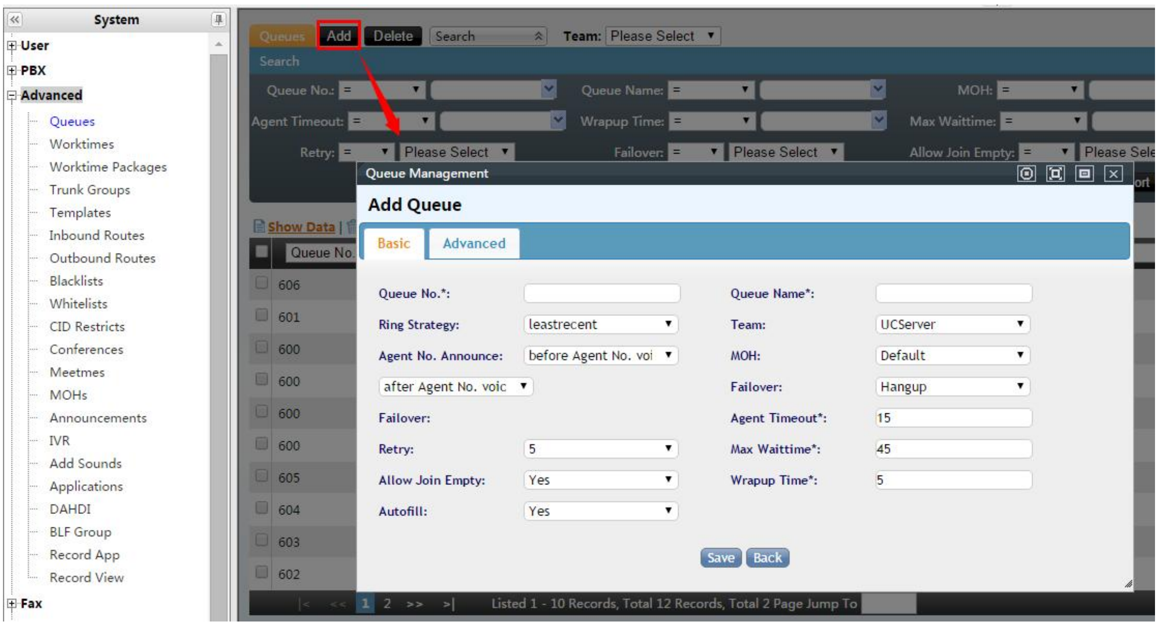
3.1.Queues

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 repeatd.

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.

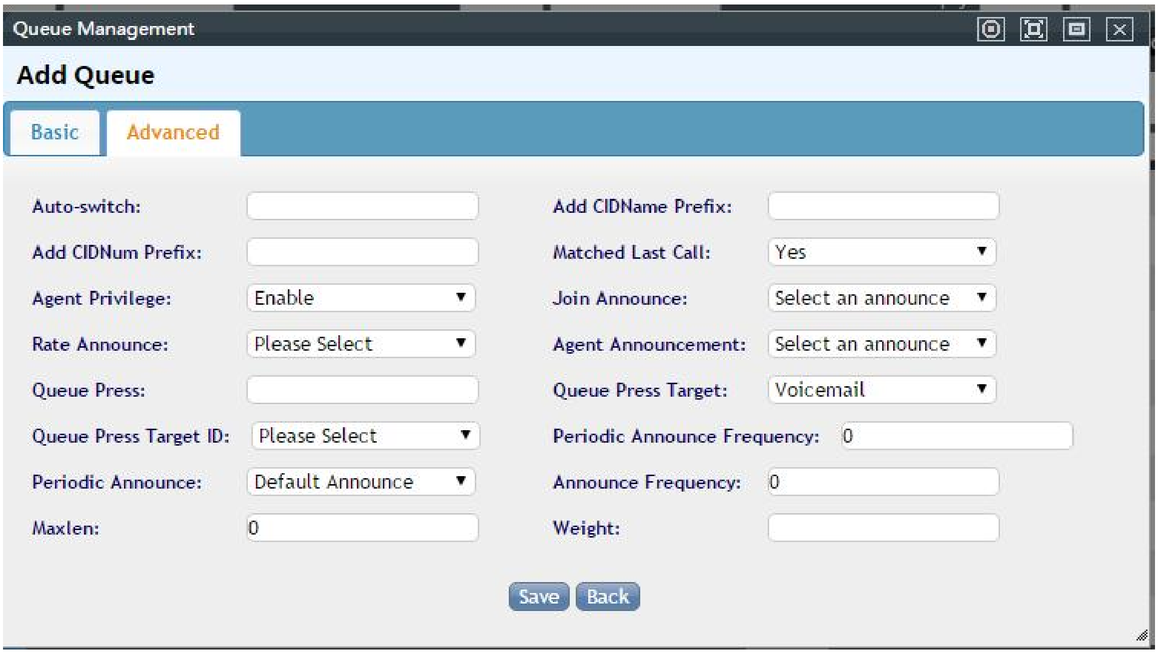
Max Wait time: When the agent wait for this long, the call will be transferred to the failover target.

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



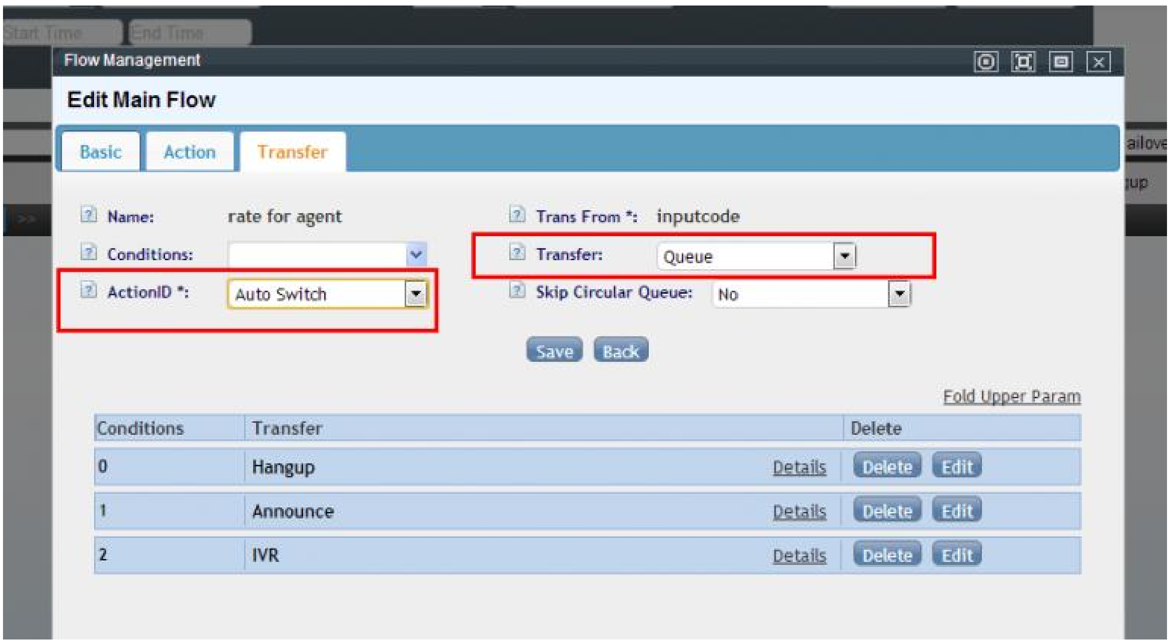
Auto-Switch：Can be used to choose a queue automatically

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"



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 matach 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;

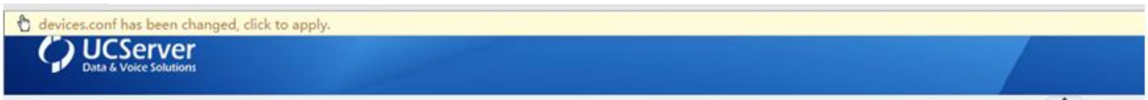
Periodic Announce Frequency: The frequency for playing the periodic announcement;

Periodic Announce: The content of the announcement;

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

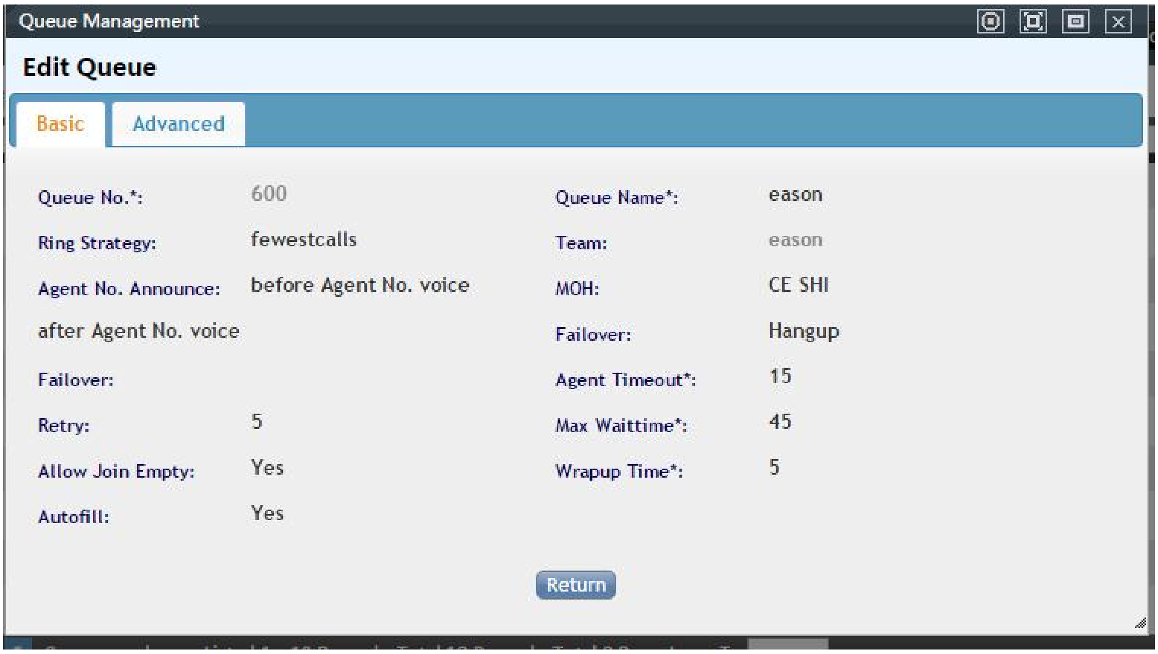
Maxlen: The max length of a queue;

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



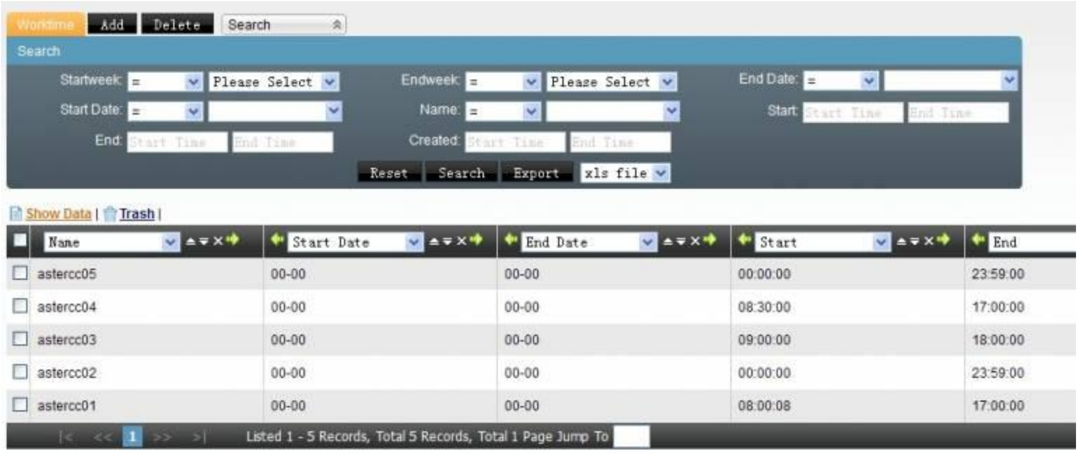
Click the yellow bar to apply the changes, after the click, the bar will disappear, and give a reload success message

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



3.2.Worktimes

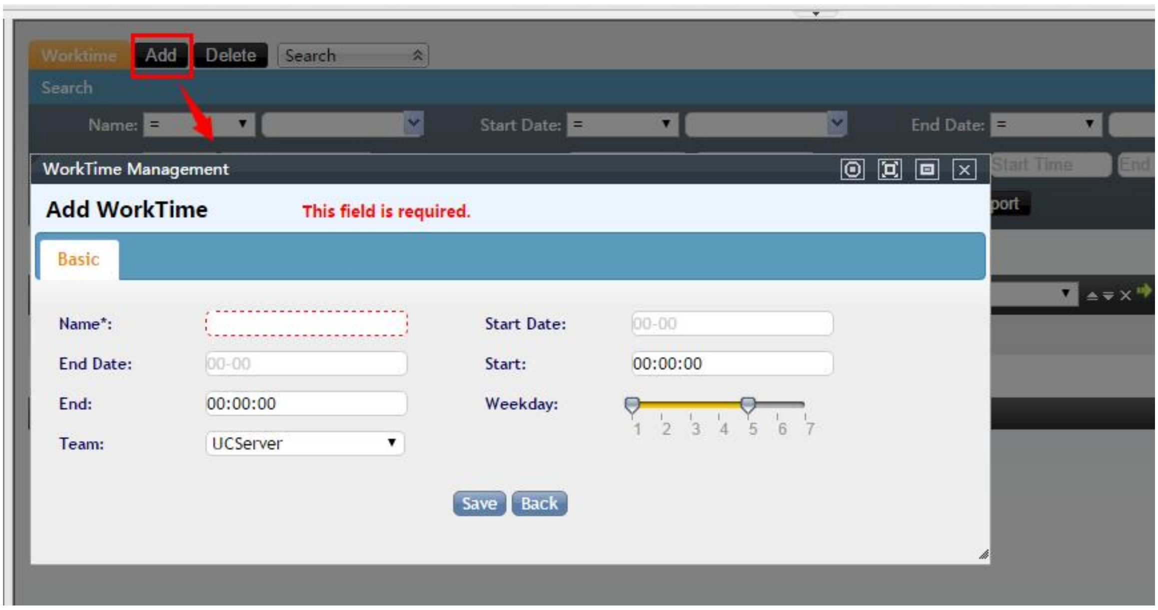
On the leftmenu[**Advanced**]–> [**Worktimes**],open the page.



Module funciton: 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.



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 eficiency on these two dates.

Star

t (time)

End (time)

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

Week day

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

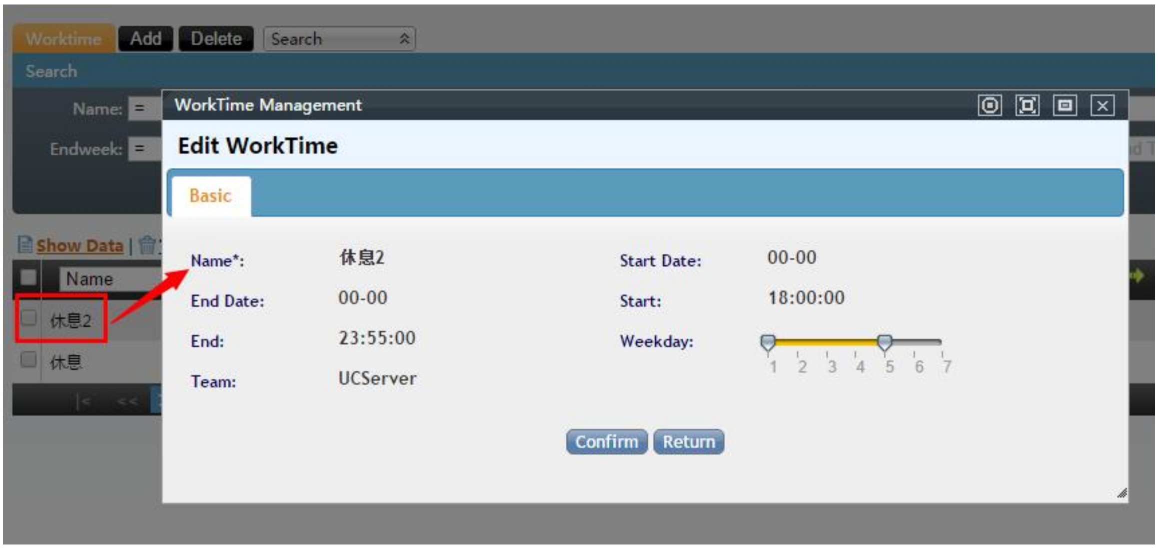
Team: select which team this work time is for.

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

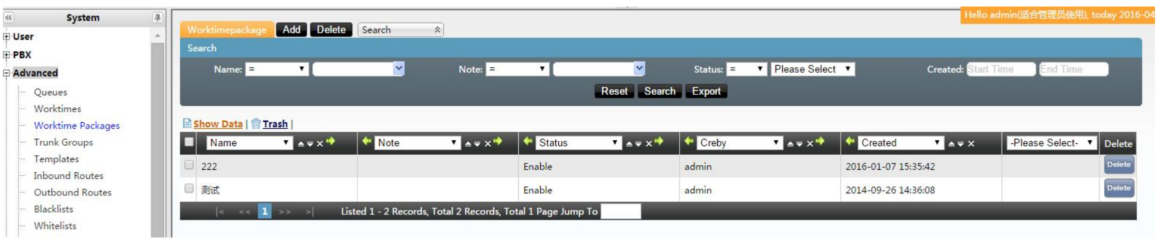
Double click the item to edit.



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

3.3.Worktime Packages

On the leftmenu,[**Advanced**]–> [**Worktime Package**],open the page

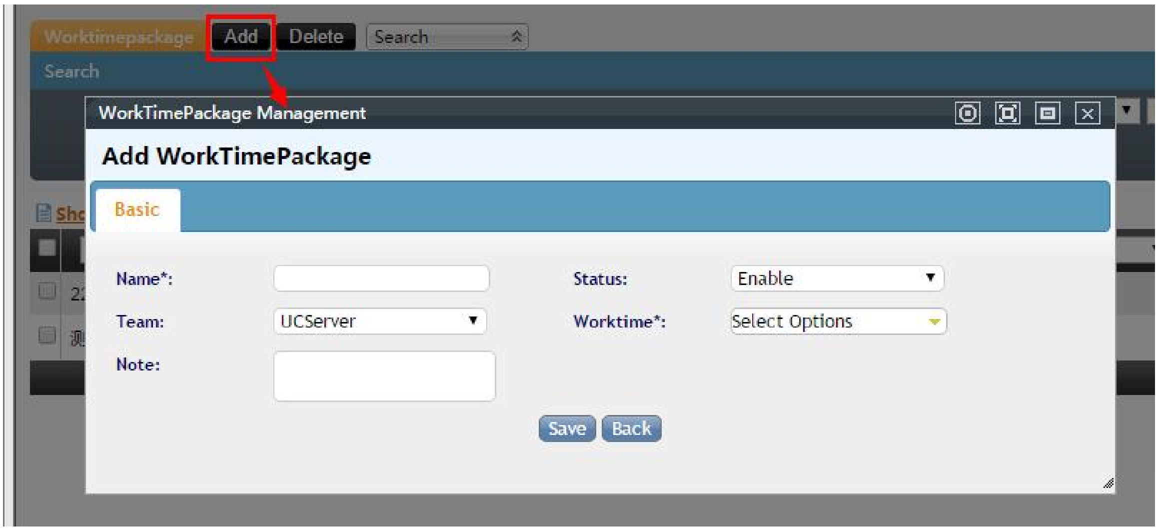


Module function: According to your business needs, we can put work times together as a worktime package.

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

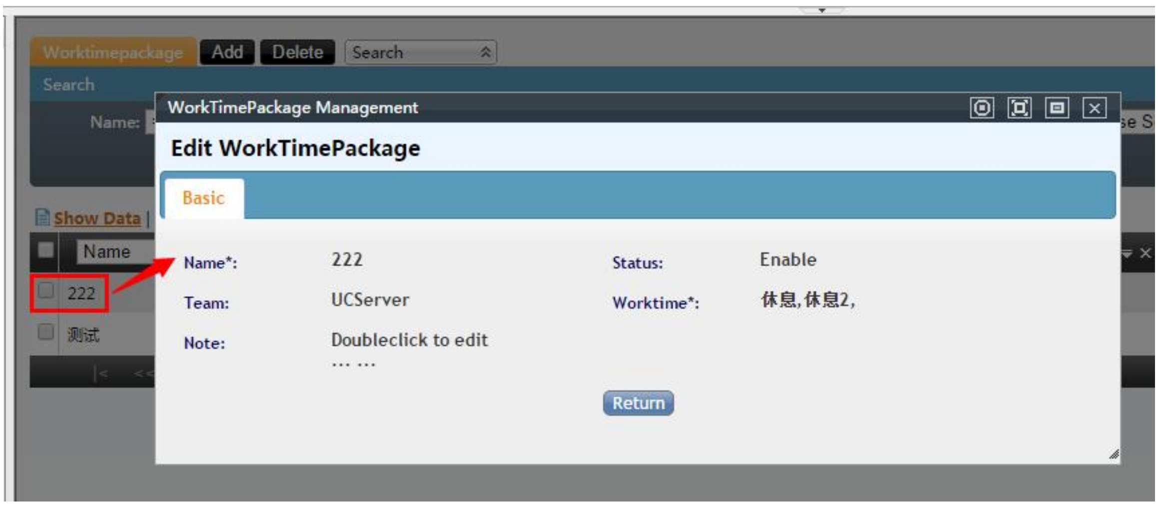
Adding page:



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

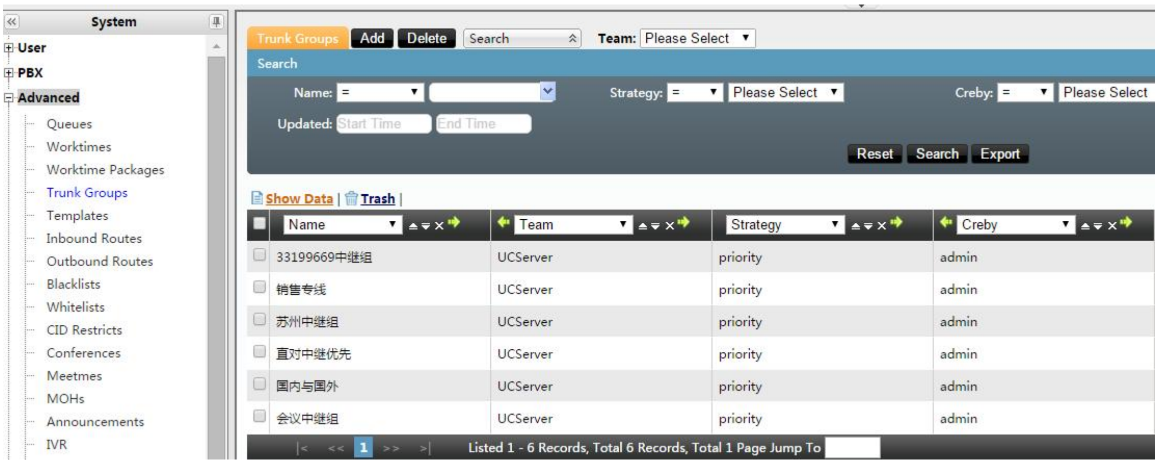
Double click the item and edit



The items in black bold are editable.

3.4.Trunk Group

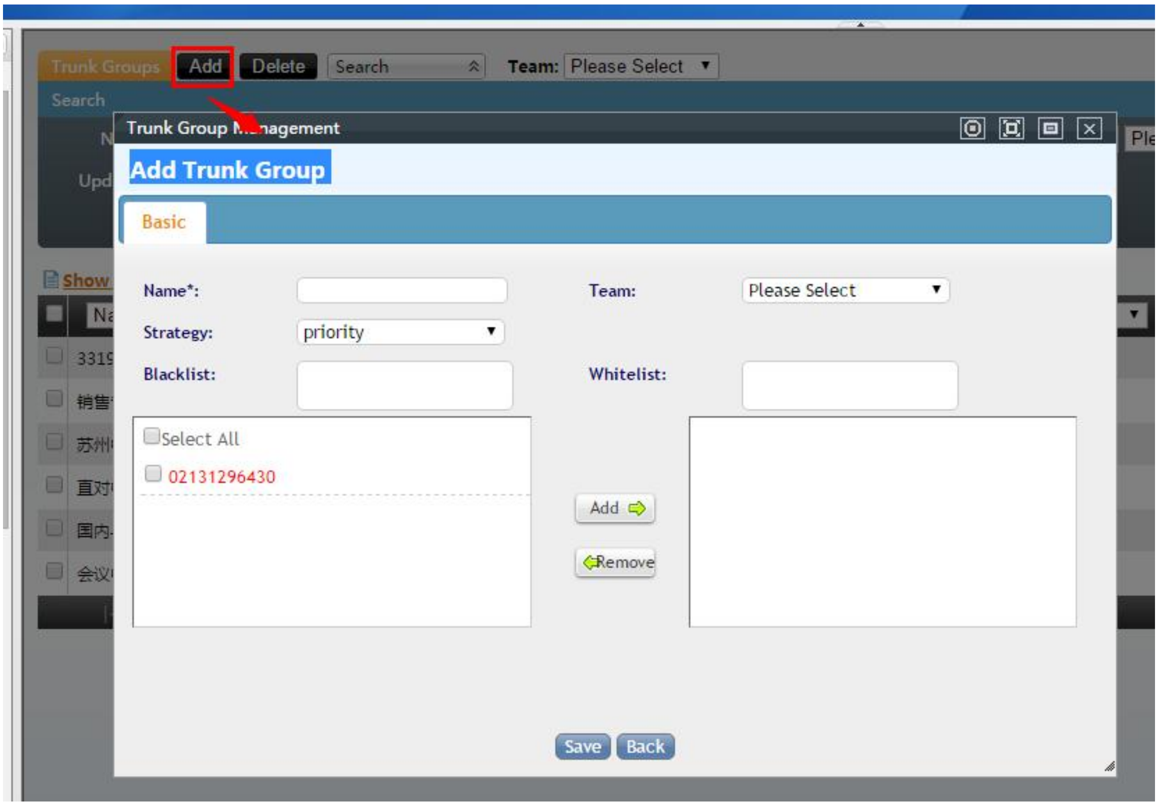
On the leftmenu,[**Advanced**]→[**Trunk Groups**],open the page



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

Add

Cilck add to open the trunk group add page.



Name: Name this trunk group.

Team: to which team this trunk group belongs.

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

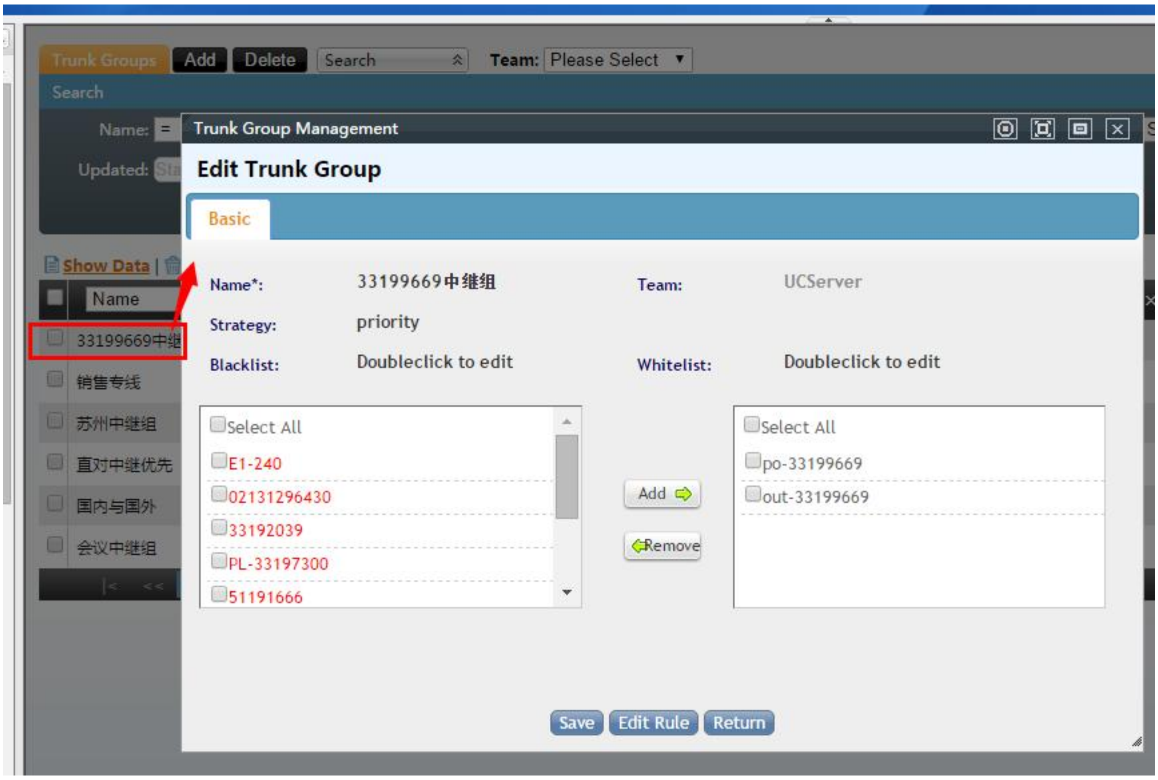
Blacklist: numbers in the blacklist cannot get through the trunk.

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

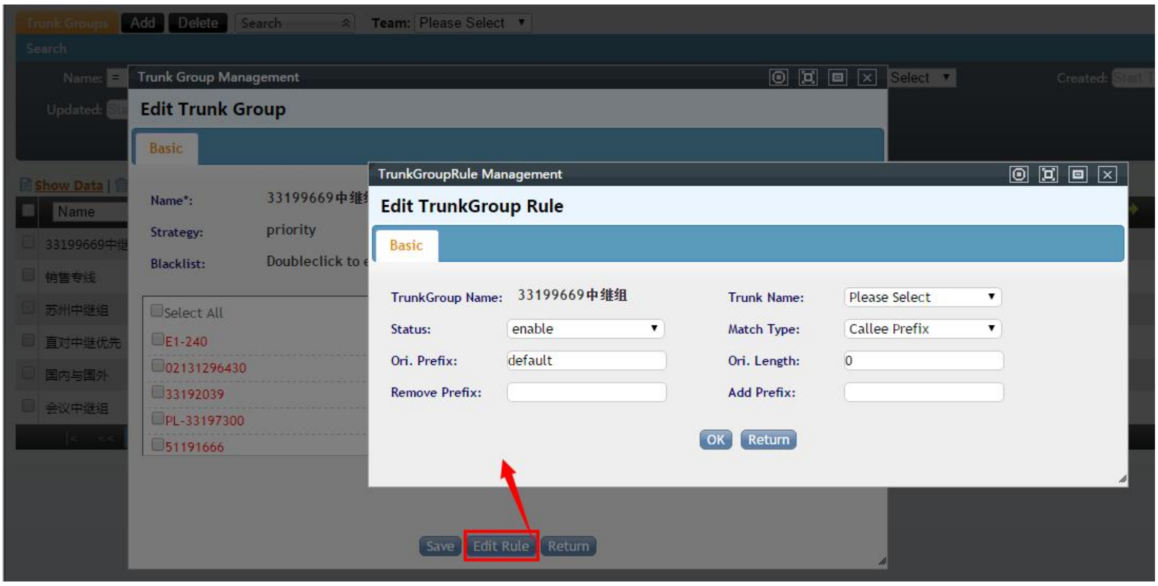
Double click the item to open the edit page.



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

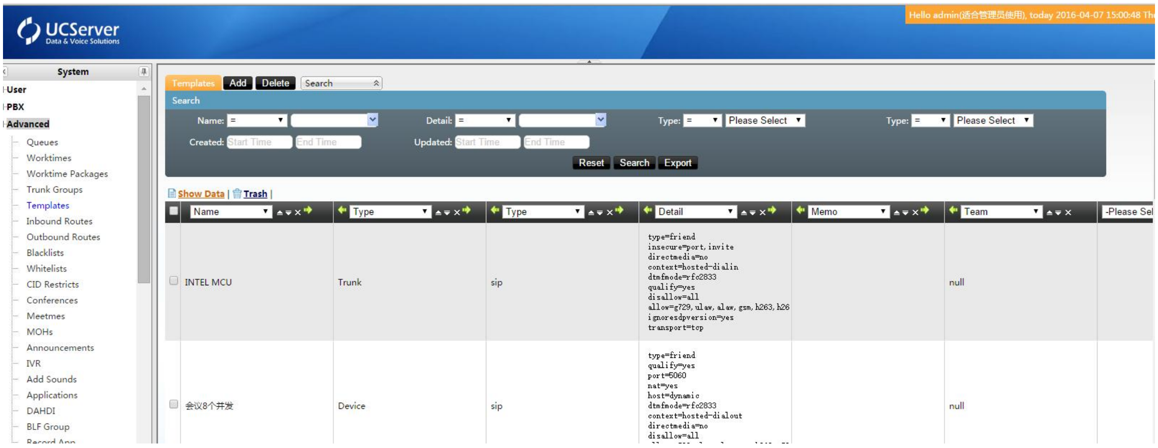
Click edit rule.



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

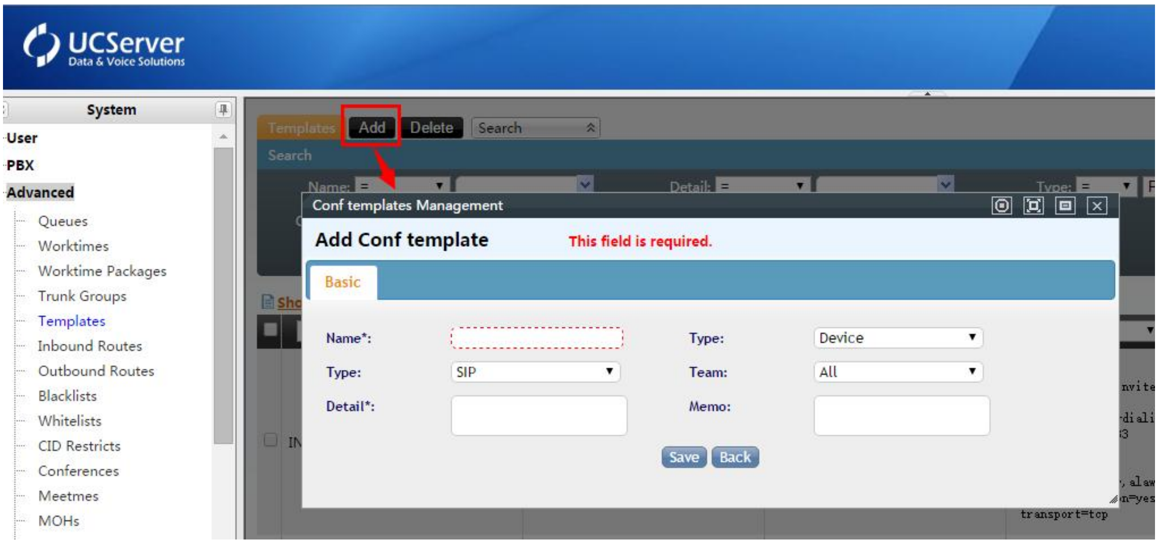
PBX template is for managing trunk or extensions on Asterisk.You can have different templates for new added trunks or extensions. If there is any modification on the template, the trunk or extensions which using this template will do the same modification accordingly.
On the left menu，click [Advanced]->[Template]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

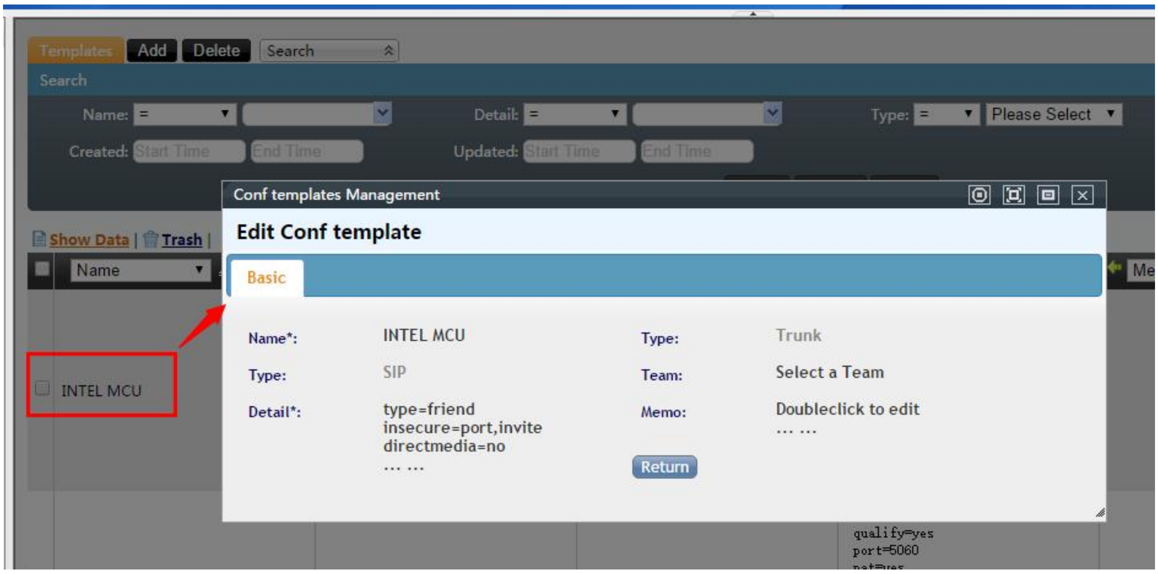
Detail: The detailed configuration formate;

Memo: Give a memo for this template;

Click save and see the newly added data.

Edit

Double click to edit a template:



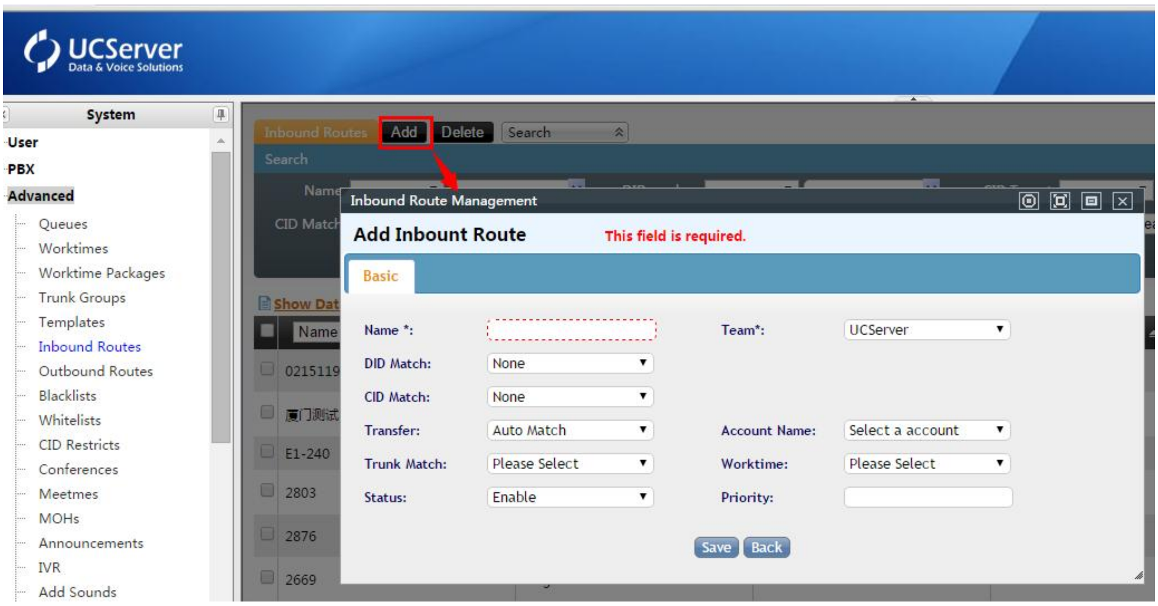
3.6.Inbound Routes

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.



Mandatory fields

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

Optional fields

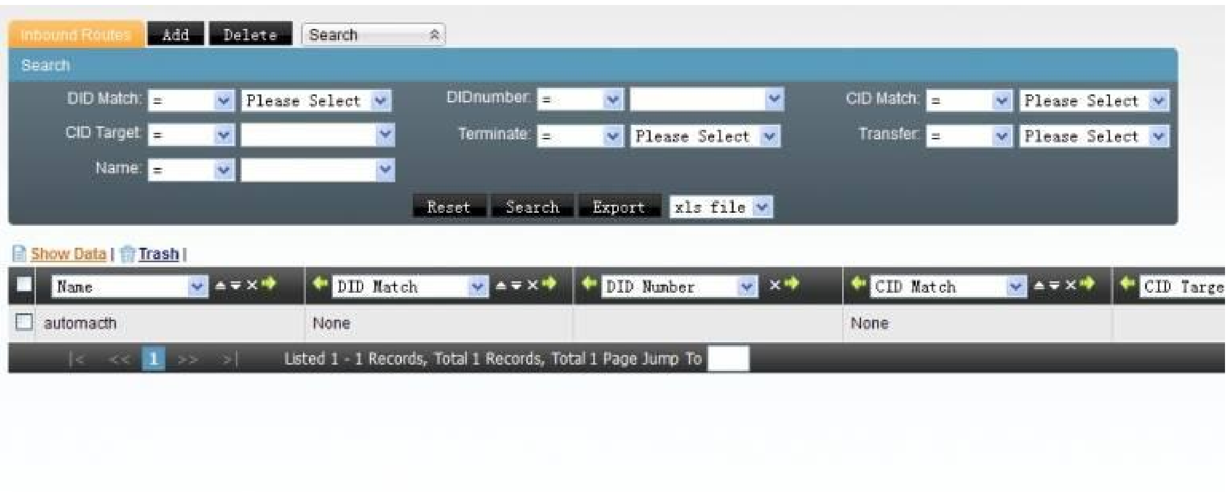
- **DID Match**：whether to enable DID match.
- None：not enable DID match.
- Completed
- Prefix
- Phonearea
- Single：match only one DID number;
- Group：match a DID number group (may contains more than one number).
- When DID is enabled, you need to select **CID Target**：DID number list or DID group list.
- **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 transfered 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.

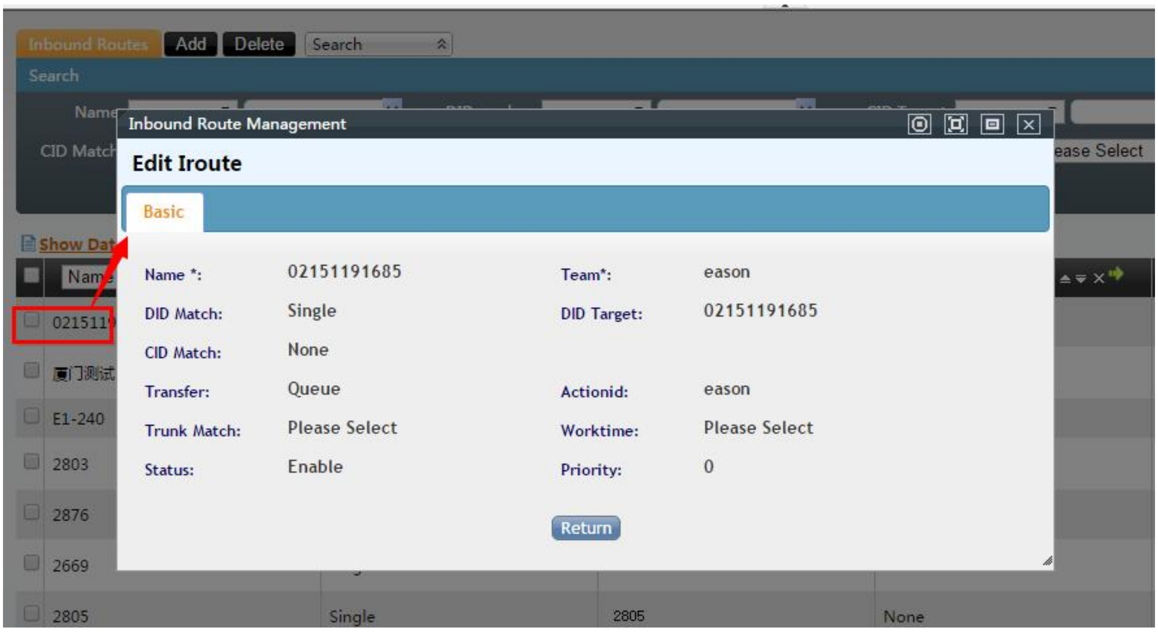
You can transfer the call to

- 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.

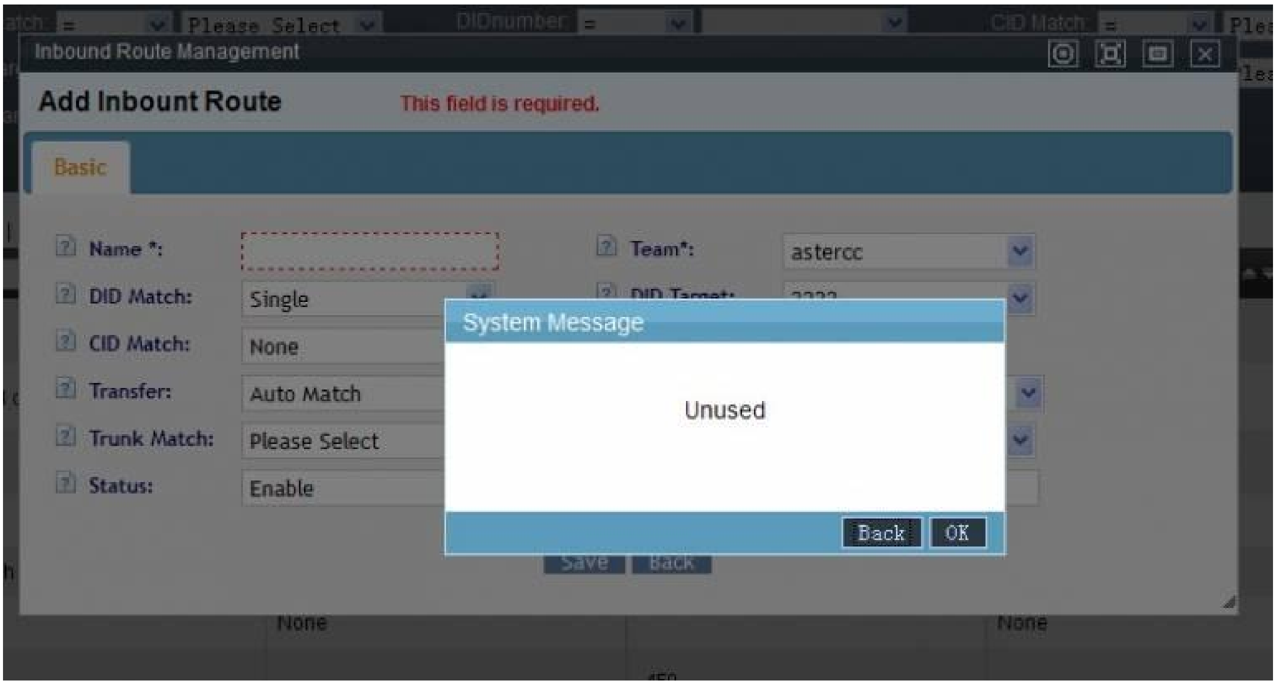
Edit the route

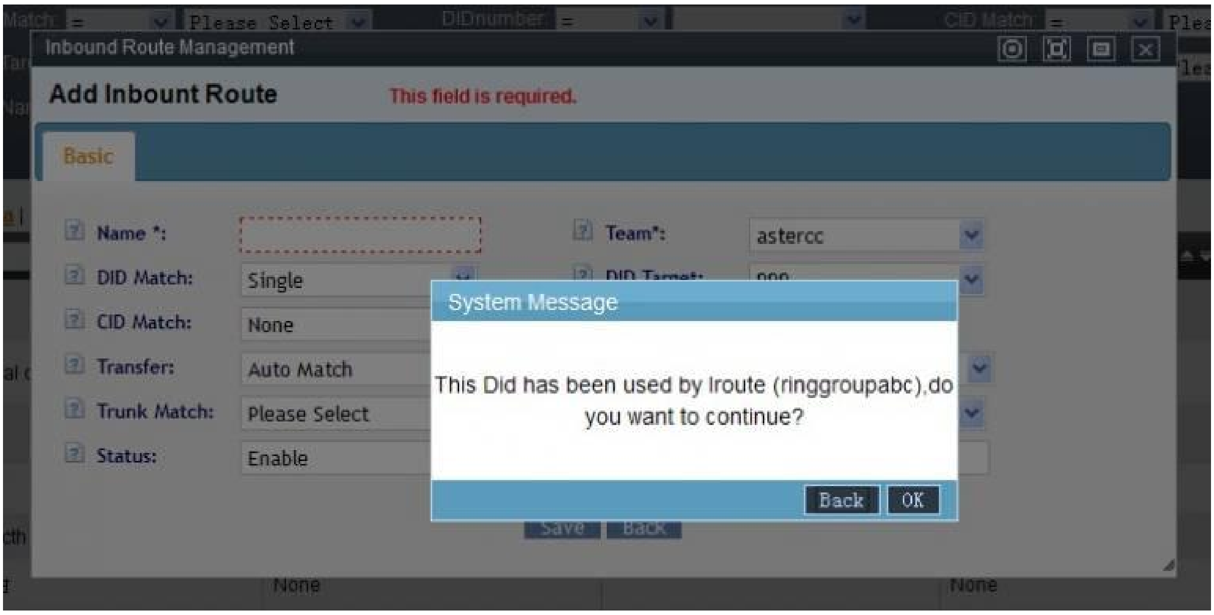


- Double click the item to open the edit page.
- When using the DID match, hover the mouse pointer to see the numbers in that DID group.



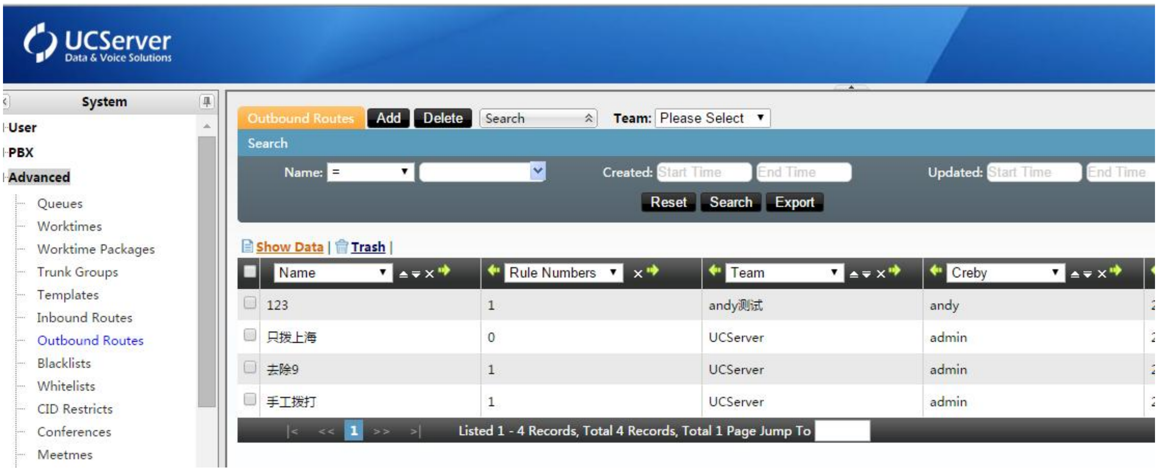
- When using DID match, and choosing the DID ID, the system will show the DID/DID group using status.





3.7.Outbound Routes

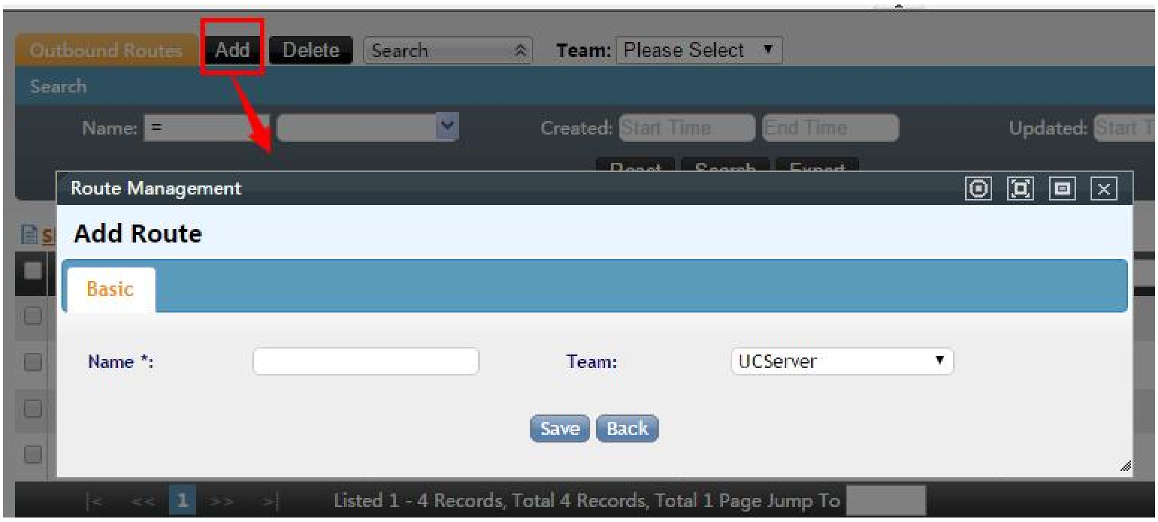
On the left Menu, click [PBX] → Outbound route to open the management page:



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.



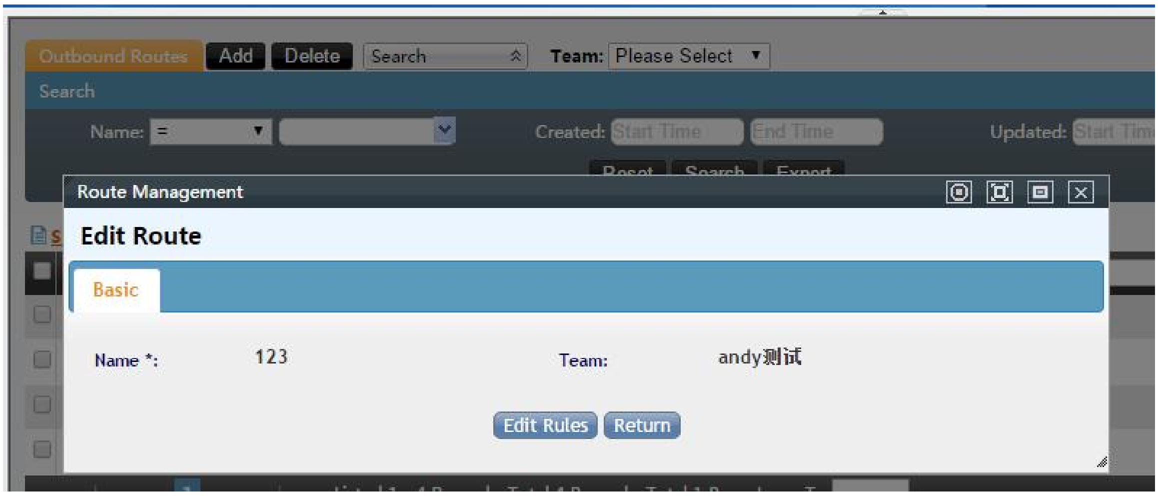
Name: name this route

Team: to which team this route belongs.

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

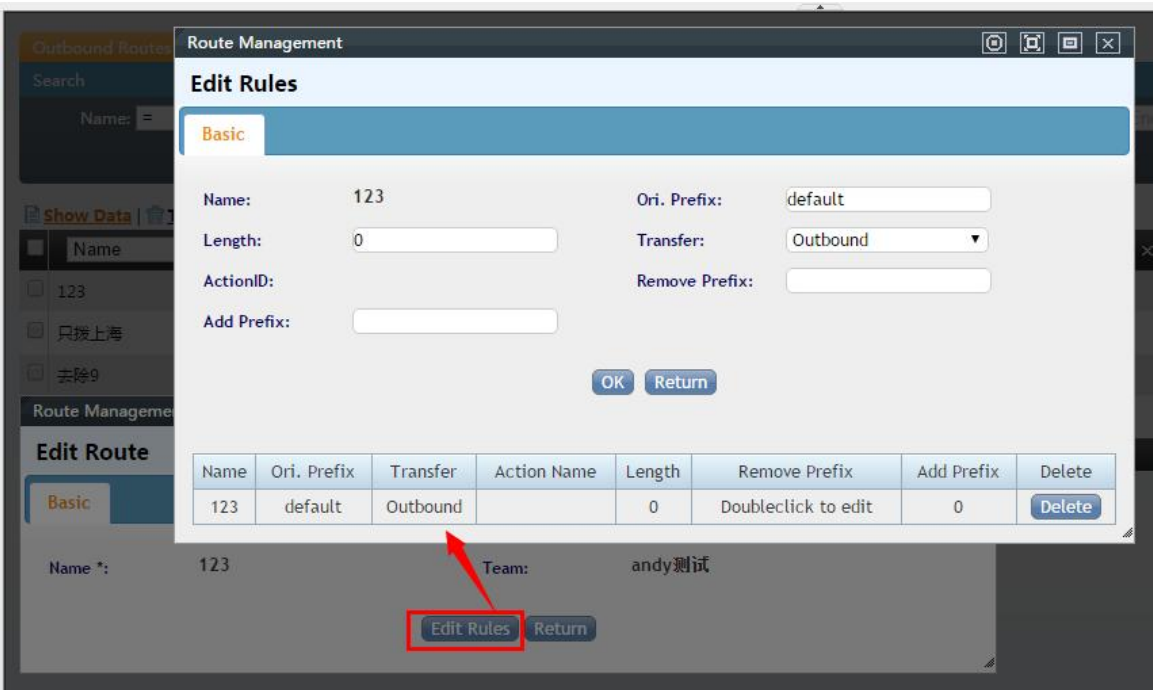
Edit

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.

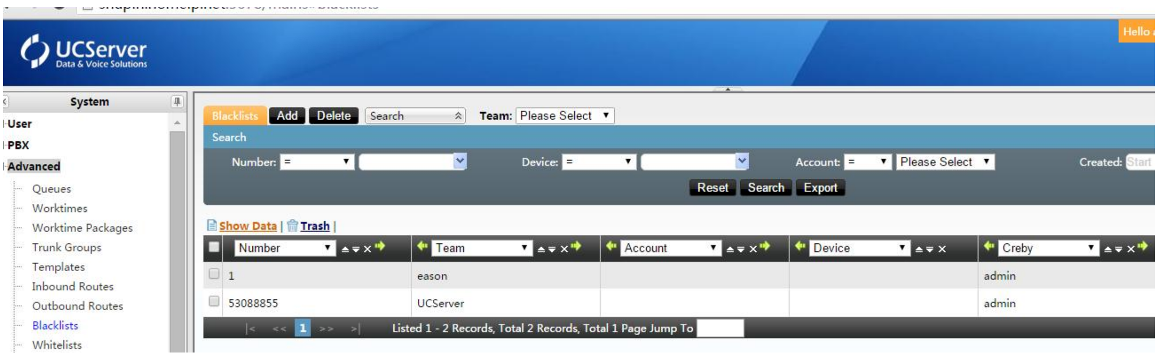
Add prefix：Set a prefix, add this prefix before matching the number.

Click save and th 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	Doubleclick to edit	Doubleclick to edit	Delete

3.8.Blacklists

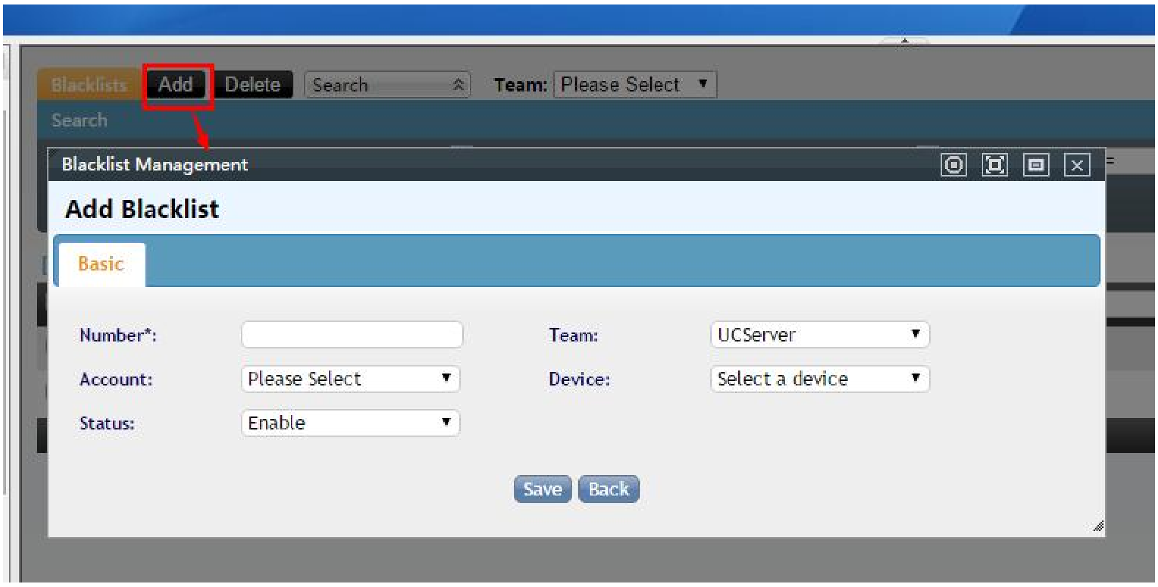
On the leftmenu,click**[Advanced]**–> [**Blacklists**],open the page



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.

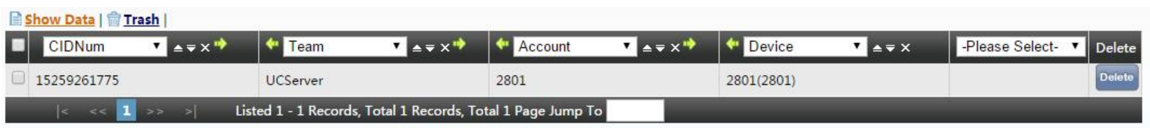
Add

Click the [Add] button,open the addpage

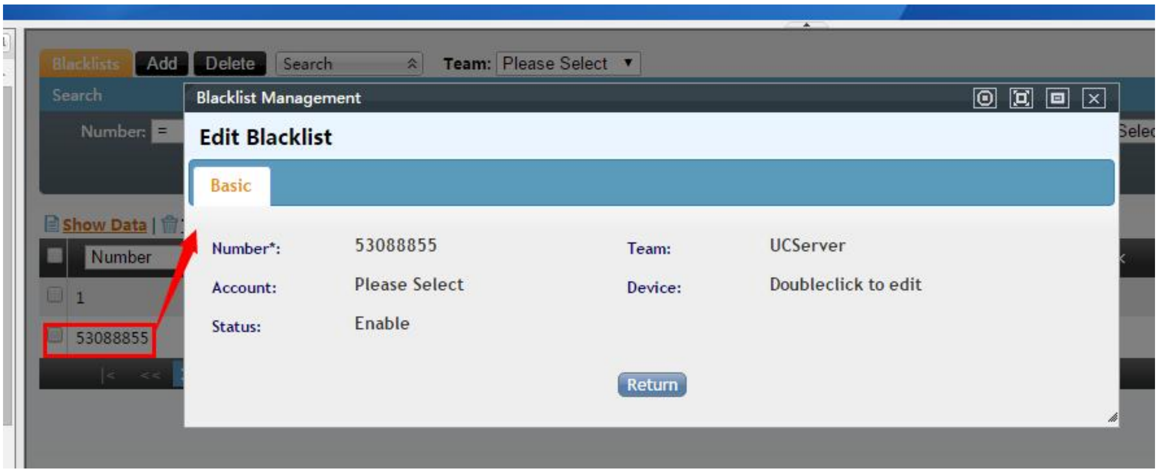


- **Number:**set which phone number to blacklist.
- **Team:**which team is effectived by this blacklist rule。
- **Account:**Not required,which account is effectived by this blacklist rule.
- **Device:**Not required,which device is effectived by this blacklist rule.
- **Status:**whether to enable the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

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

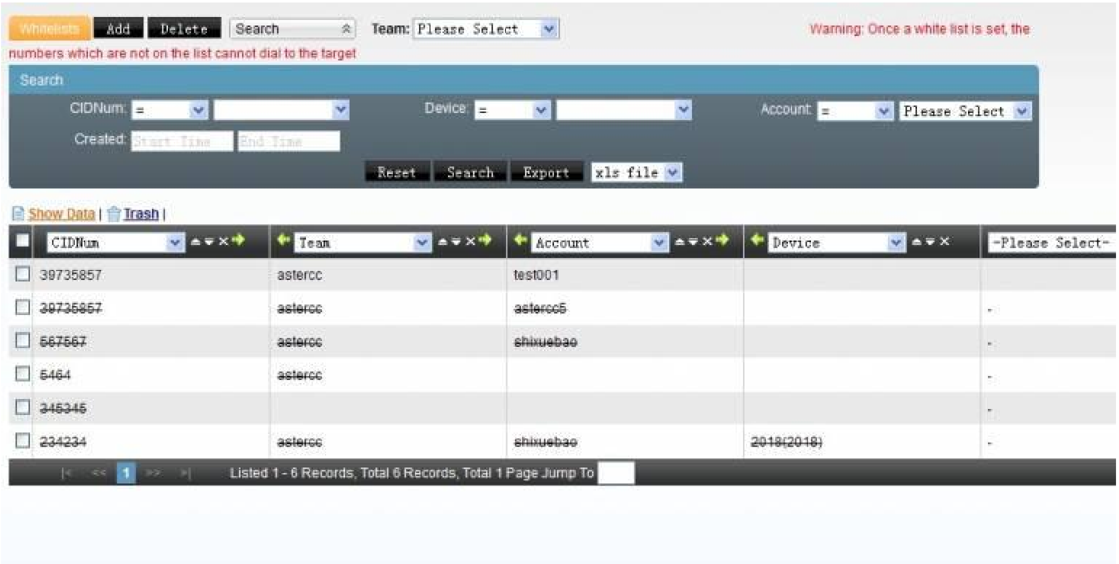


double click the data,can edit this blacklist.



3.9.Whitelists

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

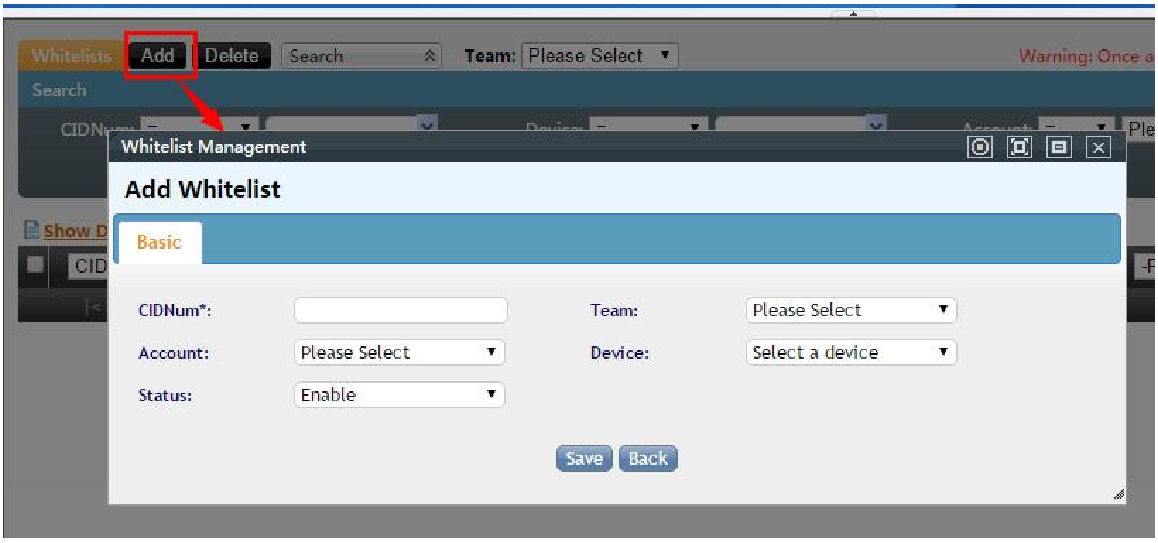


Function: Just only allow the number to dialin.Once a white list is set, the numbers which are not on the list cannot dial to the target

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

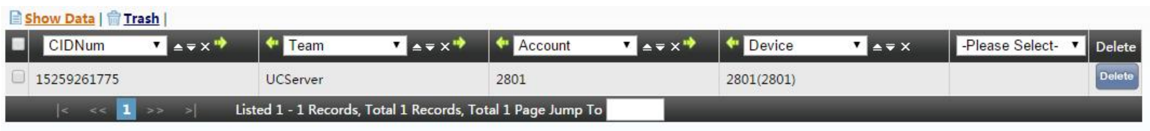
Add Whitelists

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



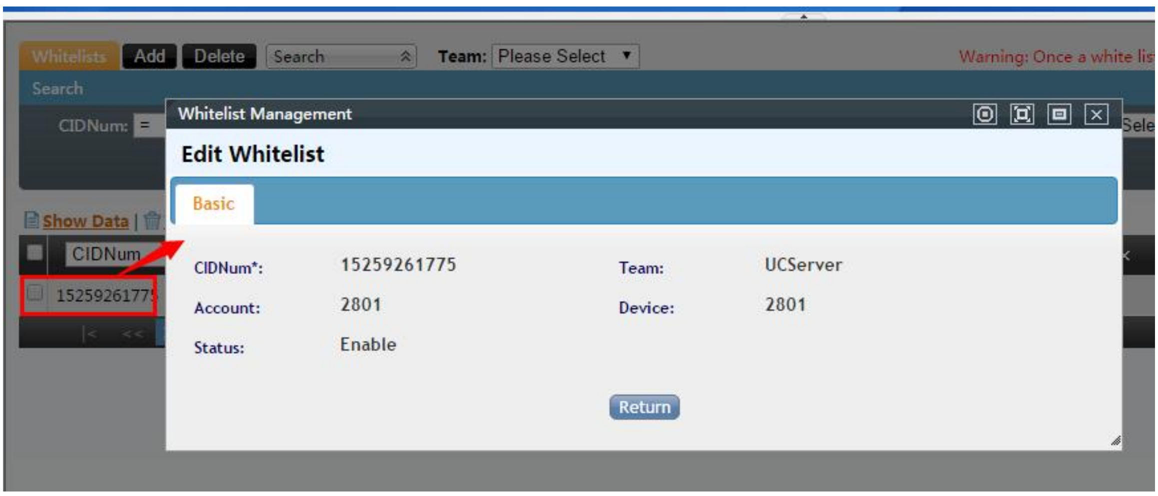
- **CIDNum:**Which number need to be in the whitelist.
- **Team:**Which team is the whitelist belongs to.
- **Account:**Not required,If only the team,it will work under the team.If choose one account,it will work under the account
- **Device:**Not required,If choose one,the whitelist will work under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

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



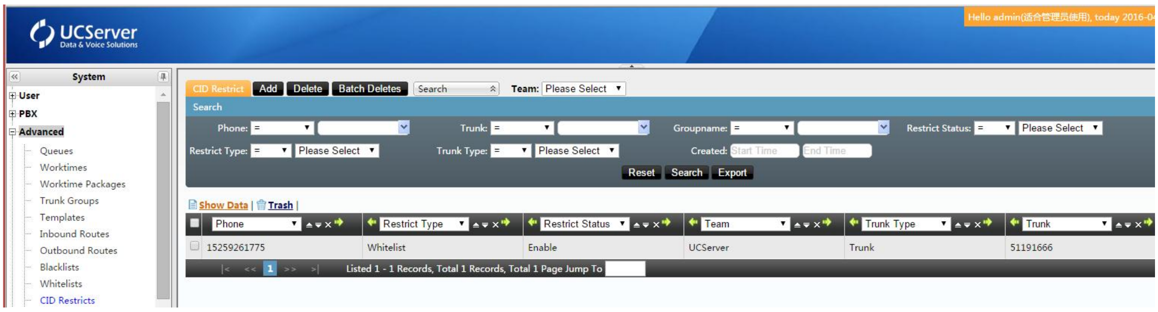
Edit Whitelist

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



3.10.CID Restricts

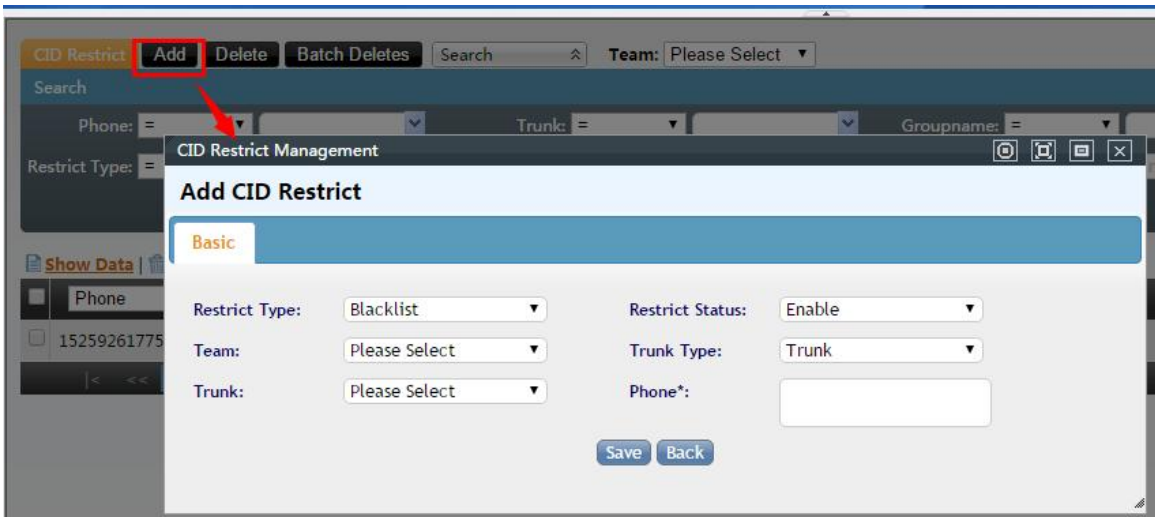
On the leftmenu,click**[Advanced]**–> [**CID Restricts**],open the page



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 testrict belongs to.

Trunk Type: trunk or trunk group

Trunk: The trunk or trunk group available listed;

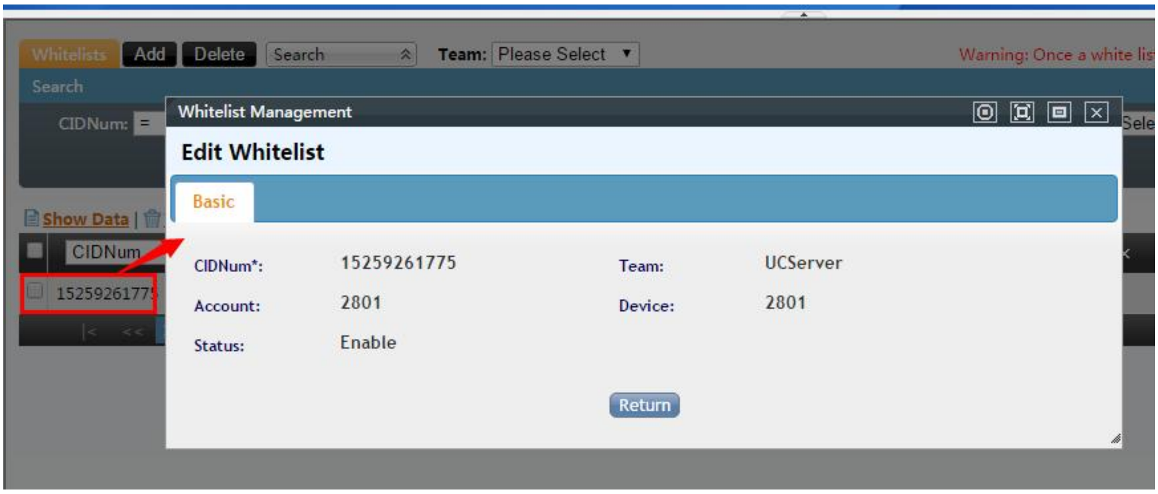
Phone: List the restricted phone numbers

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

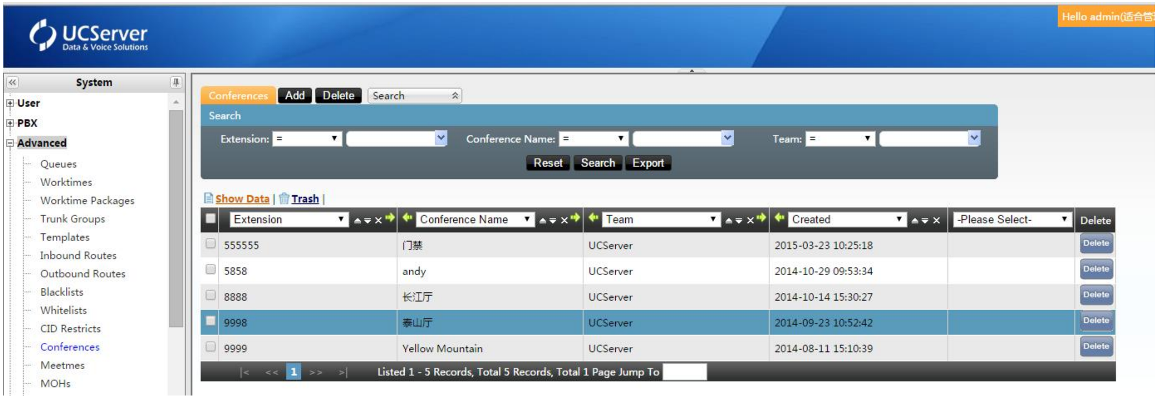
Edit

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



3.11.Conferences

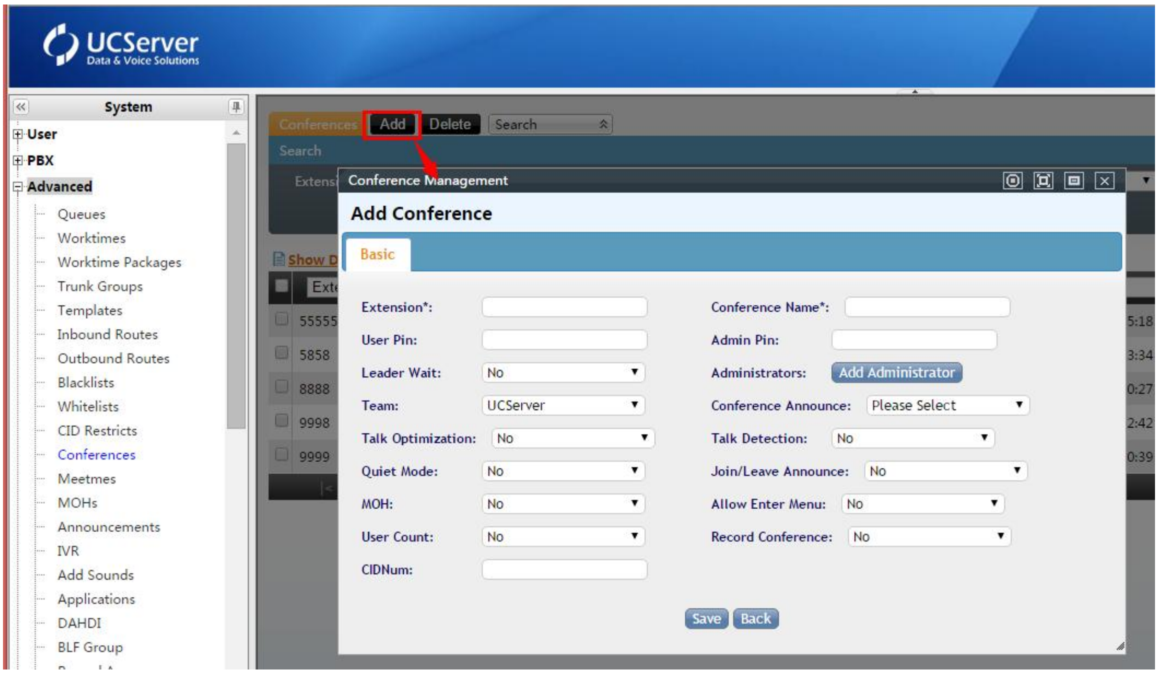
On the leftmenu,click**[Advanced]**-> [**Conferences**],open the page



Module Function：To set conference rooms

Add

Click【Add】to add new conference room:

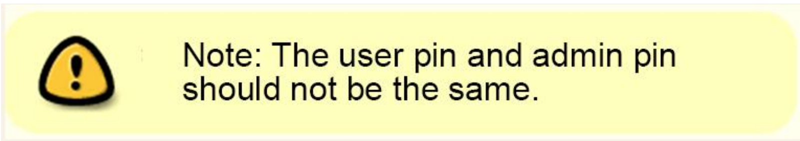


Extension：The conference room number, the extensions can call this number to enter the conference;

Conference Name: Name the conference room;

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

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



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;

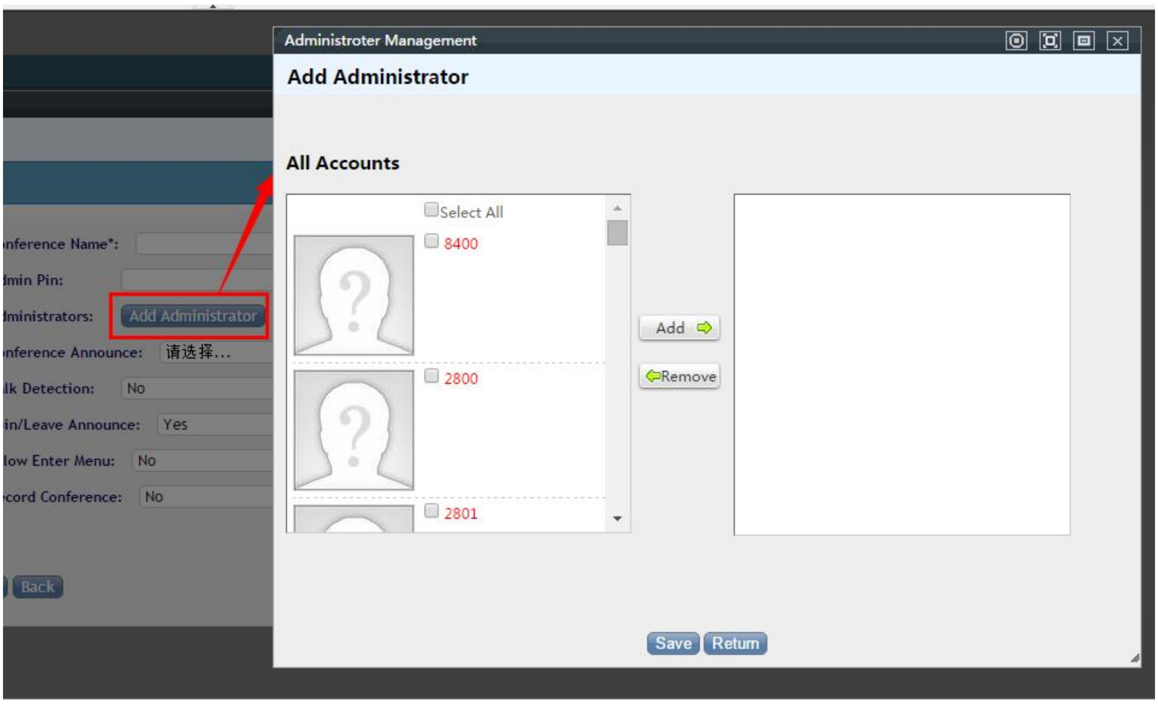
User Count：Whether to count user quantities or not;

Record Conference：Whether to record conference or not;

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

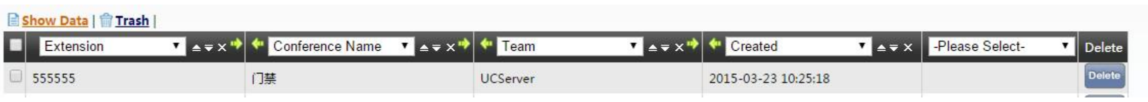
Add Administrator

Click【Add Administrator】to open bellow page:



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

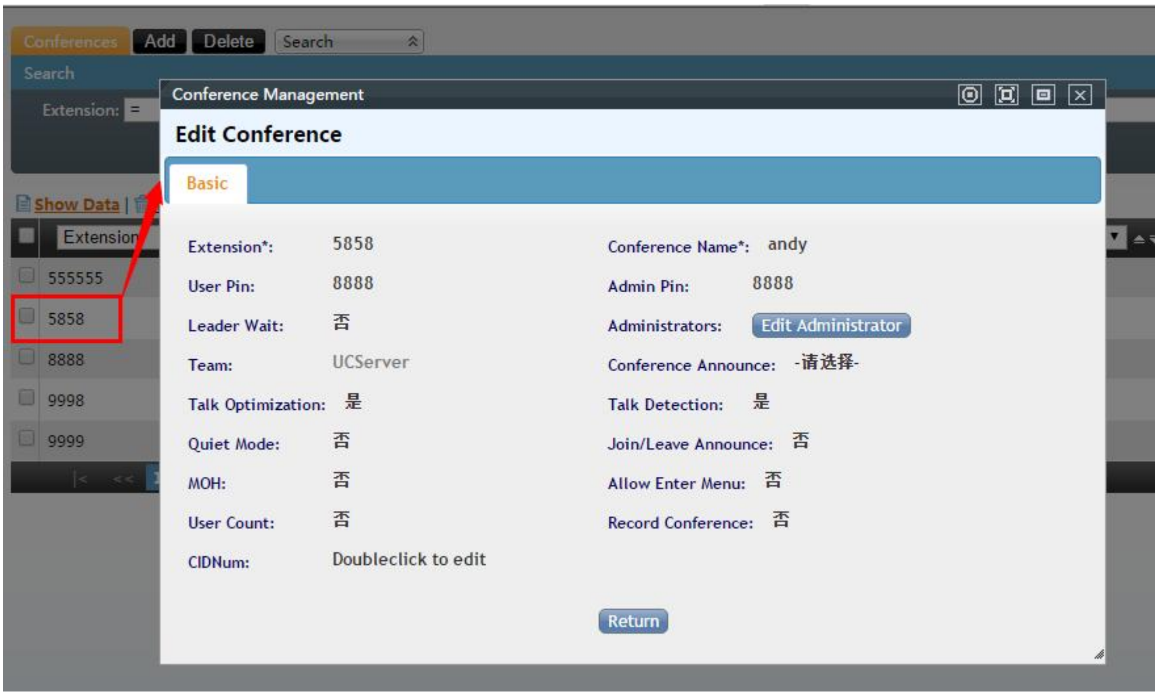
After finished the data,you can click the [Save] button to save the data.Then you can see the data shown in the list.


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

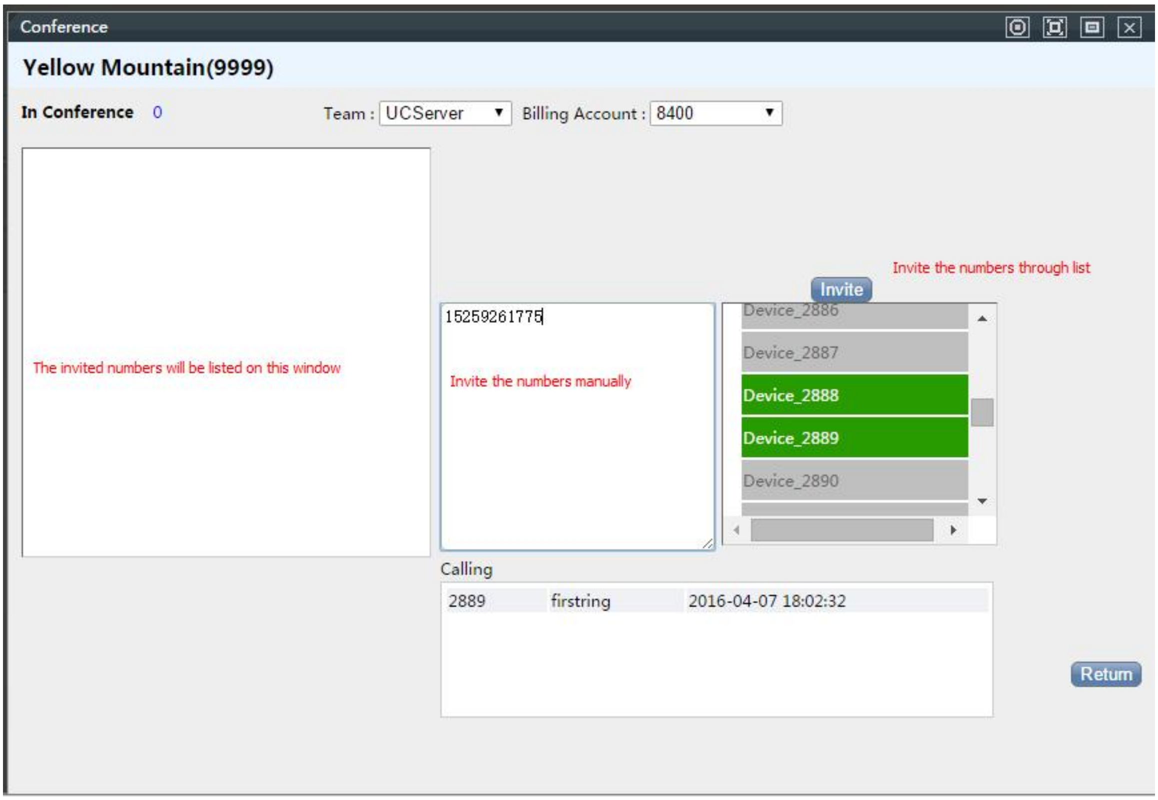
On the leftmenu,click**[Advanced]**–> **[Meetmes]**,open the page

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.

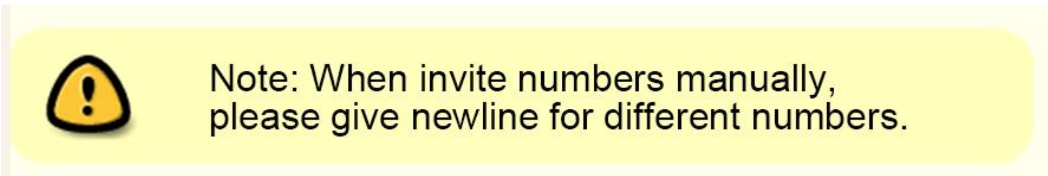
If there are conference rooms, when enter Meetmes page, it will show all the conference rooms, like above picture shows.

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



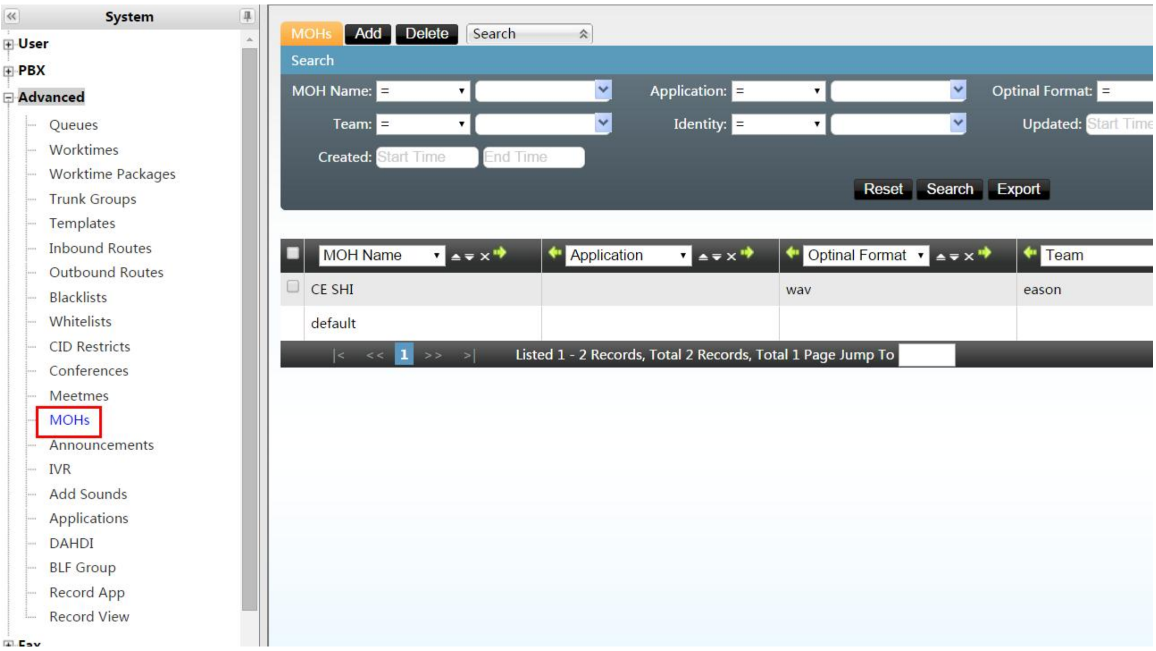
The left window lists all the invited numbers.There are two ways to invite people into the meeting. One is choose the existed extensions or phone numbers from the right drop window, the other is entering the numbers on the mid window. After click 

button, the system will call the numbers automatically.



3.13.MOH

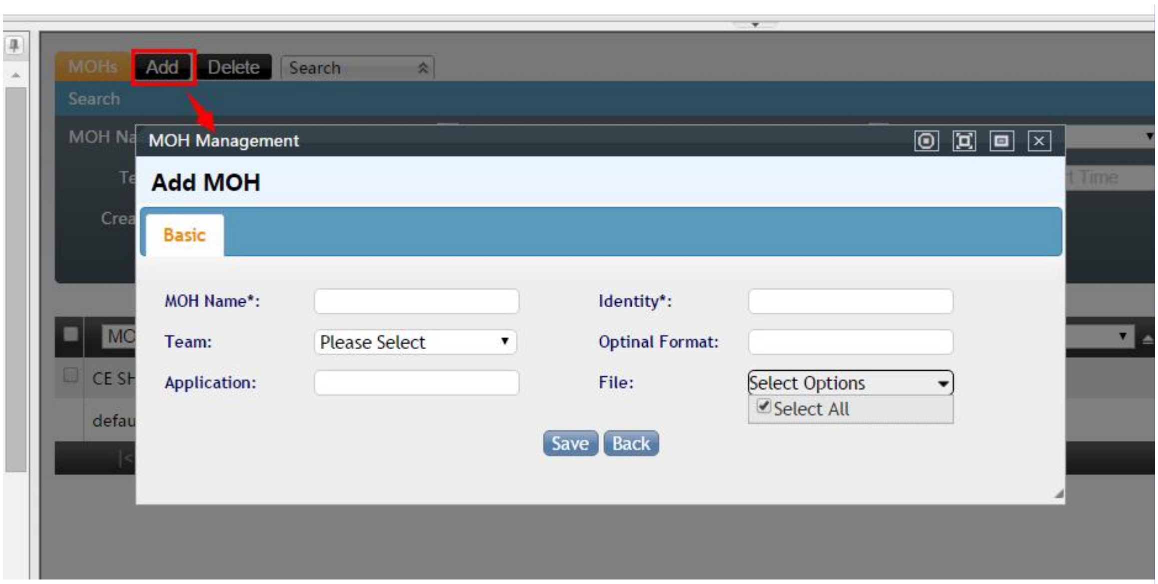
On the leftmenu,click[**Advanced**]-> [**MOH**],open the page



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;

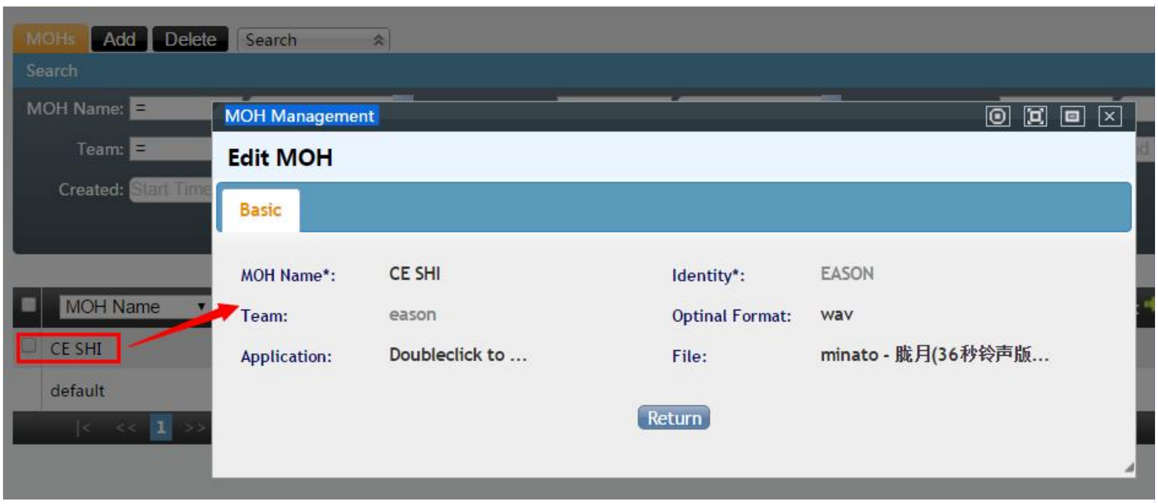
Optional Format: None。

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.

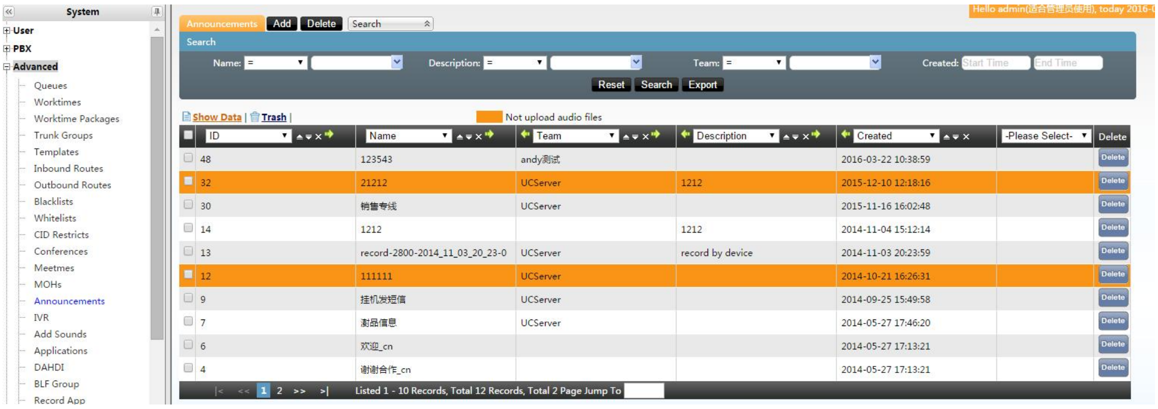
Edit

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



3.14.Announcements

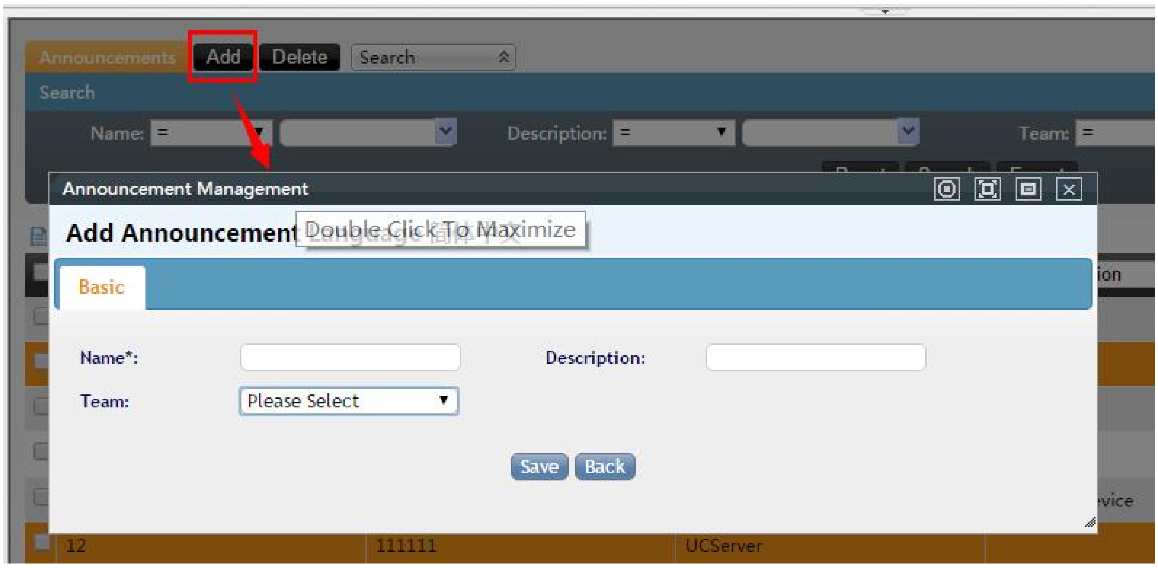
On the leftmenu,click[**Advanced**]-> [**Announcements**],open the page



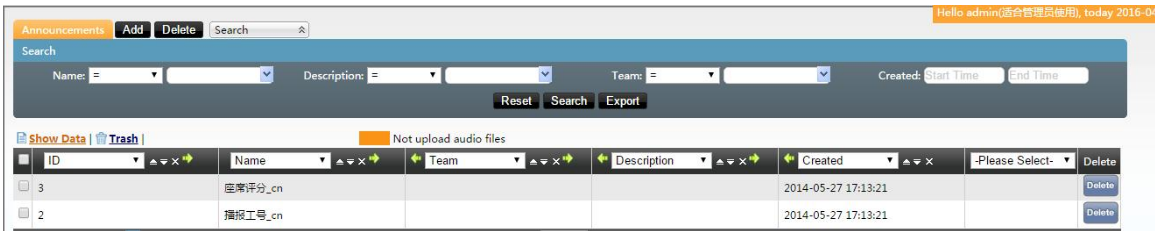
Module Function: To manage callin announcements

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

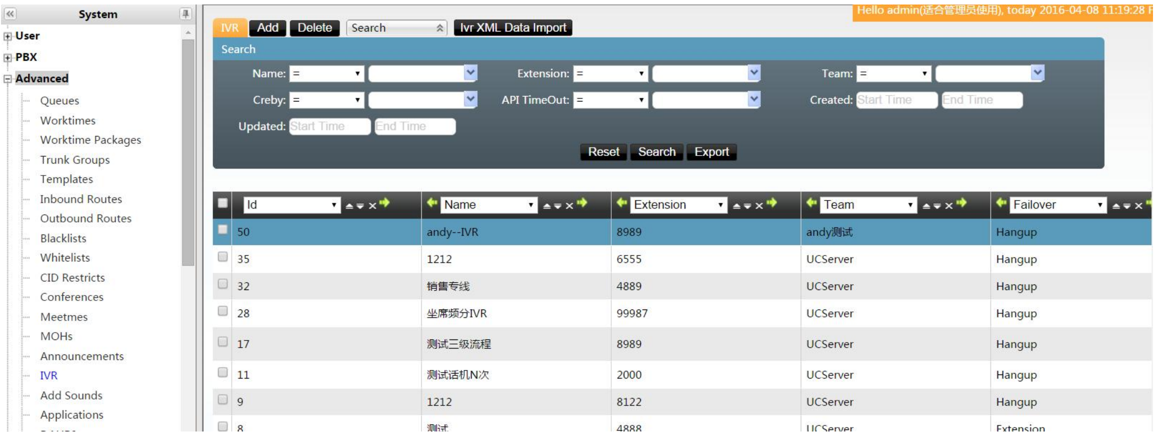
Click  icon to upload the announcement;

Click  icon to check the announcement online;

Click  icon to download the announcement;

3.15.IVR

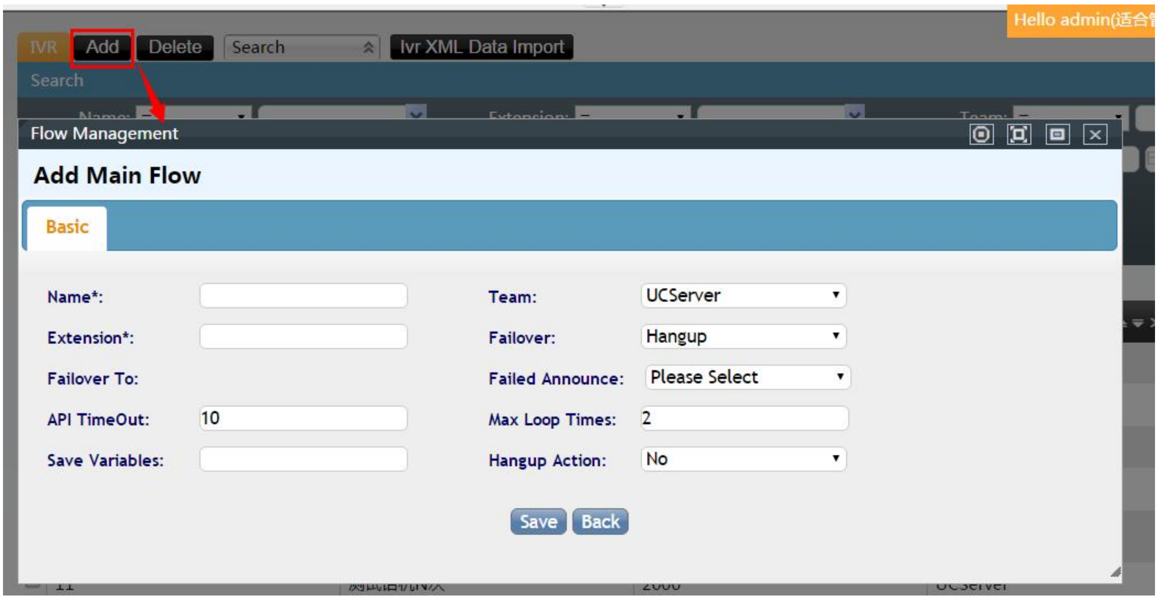
Interactive voice response is what we call IVR. When you dial 10086 and you will hear voice instruction to guide you for services. IVR can be used to guide customers, deal interactive services, play voice broadcast etc.
On the leftmenu,click[**Advanced**]-> [**IVR**],open the page



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 extionsion 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.

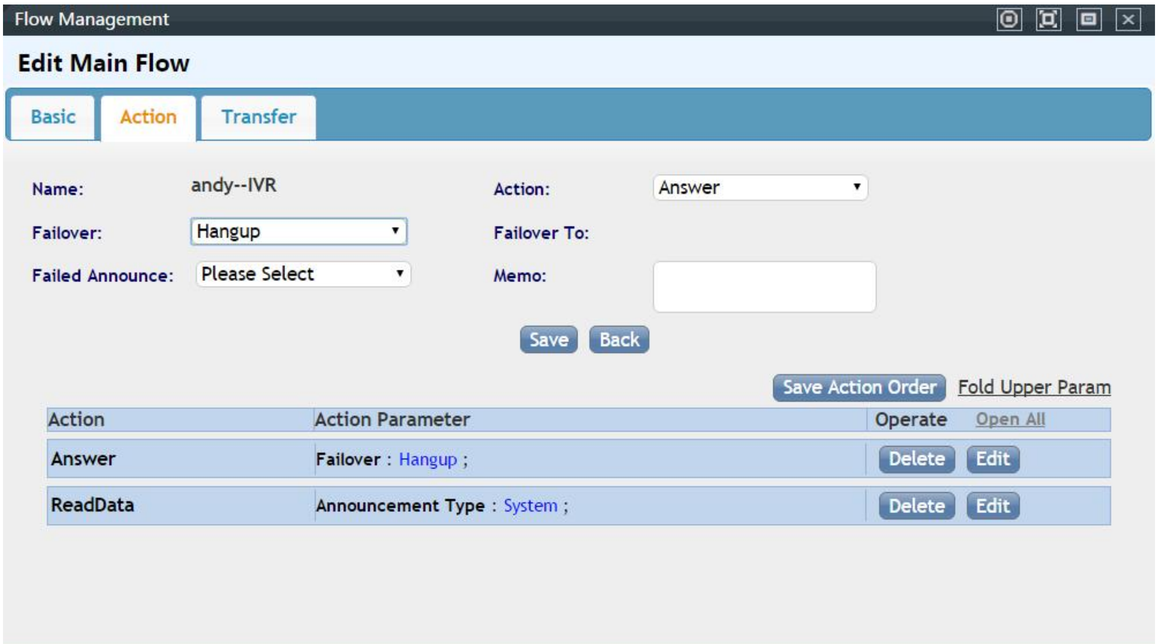
Save Variable：To pass the variable to business layer 于给业务层传递的变量。

Hungup Action：webservice，HTTP

Edit

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

Action



Action：Choose an action for this IVR;

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

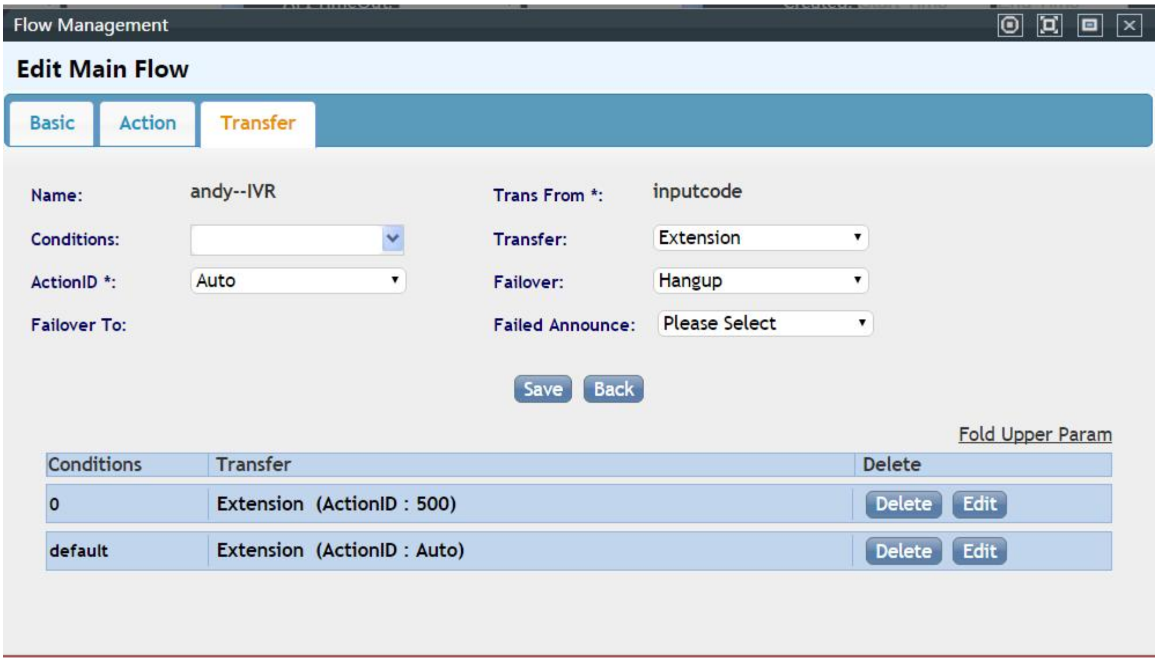
Failover to：Except failover to hangup and busy, the rest Failover needs choose failover to target;

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

Meno：Give a description for thisIVR;

Save Action Order, you can edit the other action.

Transfer：



Trans From: Input the transfer code

Conditions：default or blank

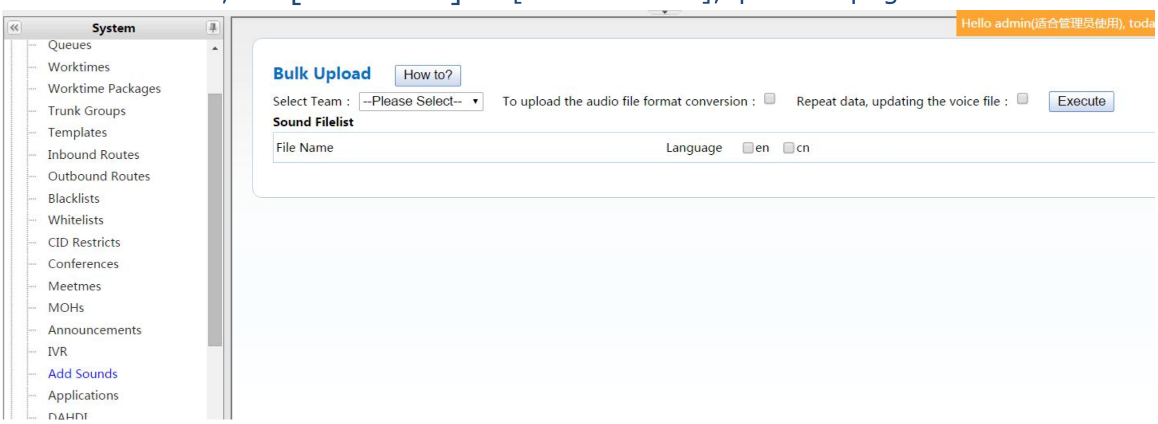
Transfer：If carry out transfer action, where it will go to.Please select from the drop list

Action ID：The transfer target;

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

3.16.Add Sounds

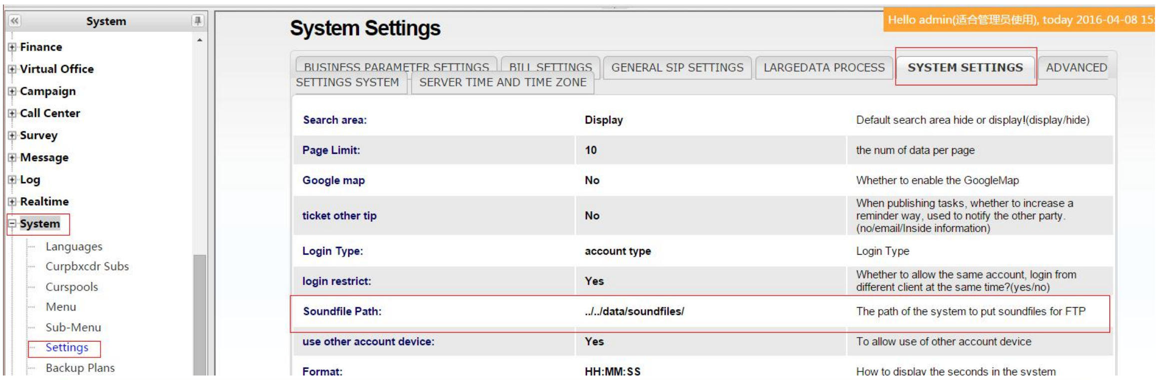
On the leftmenu,click[**Advanced**]-> [**Add Sounds**],open the page

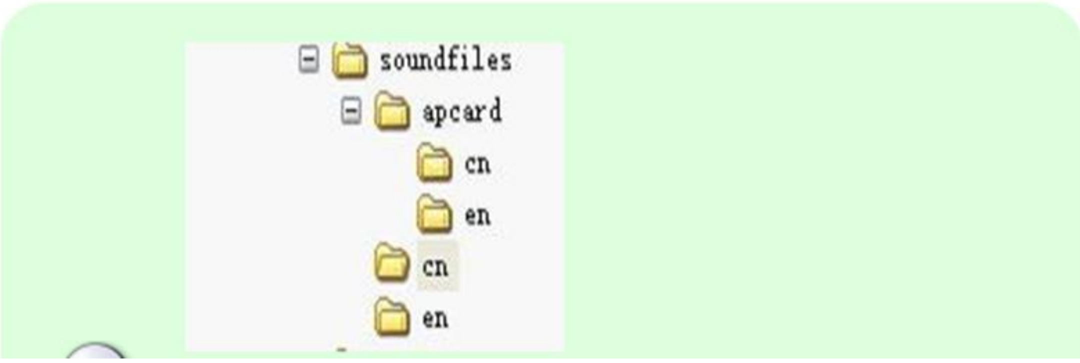


Module Function：To save the uploaded sound file in sound file management and callin sound file management

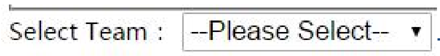
Choose the file language.If the language file is there, it can be clicked, if not, can not be clicked.

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

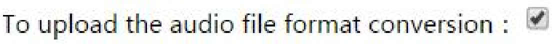




Then when you reenter the add sounds page,it will list all the sound files under this file.



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 Sounfiles cataloge.

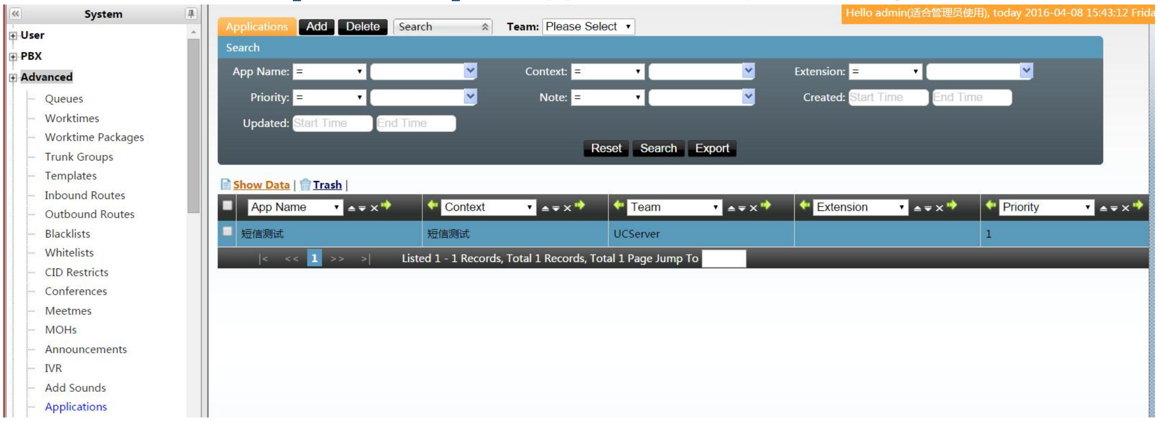


If click, it will list all the mp3 and wav format files.

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

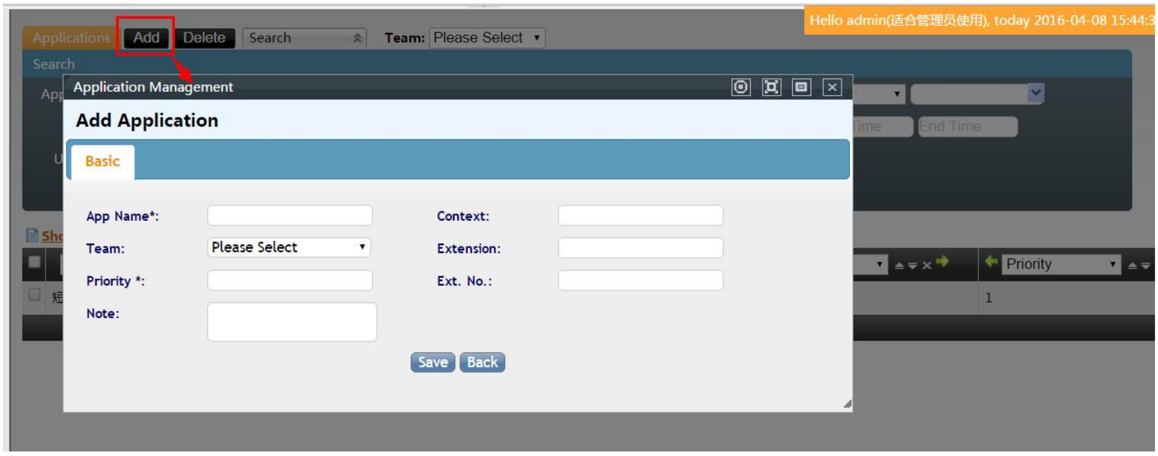
3.17.Applications

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



Add

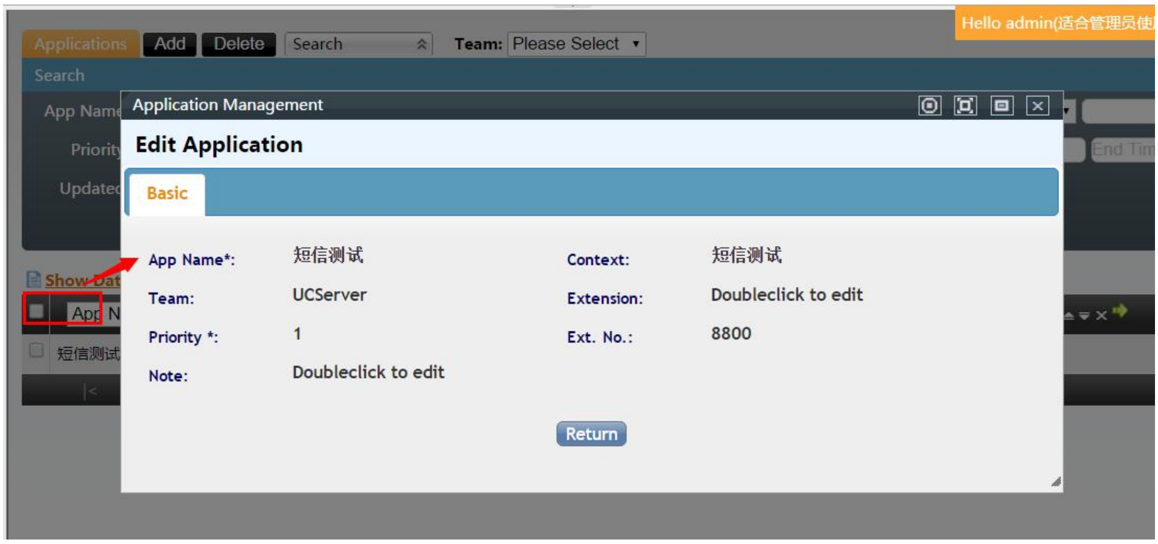
Click【Add】button to open the Add Application page:



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.

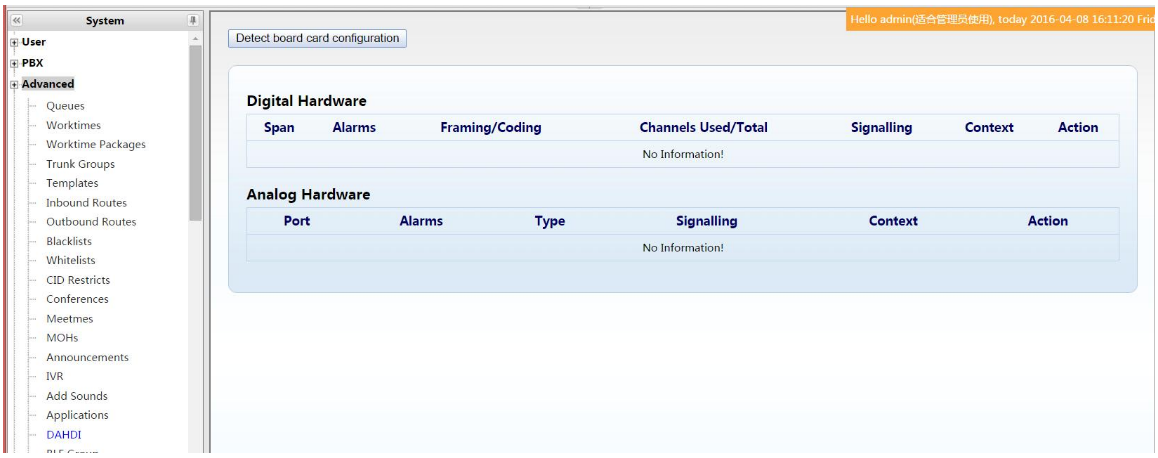
Edit

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



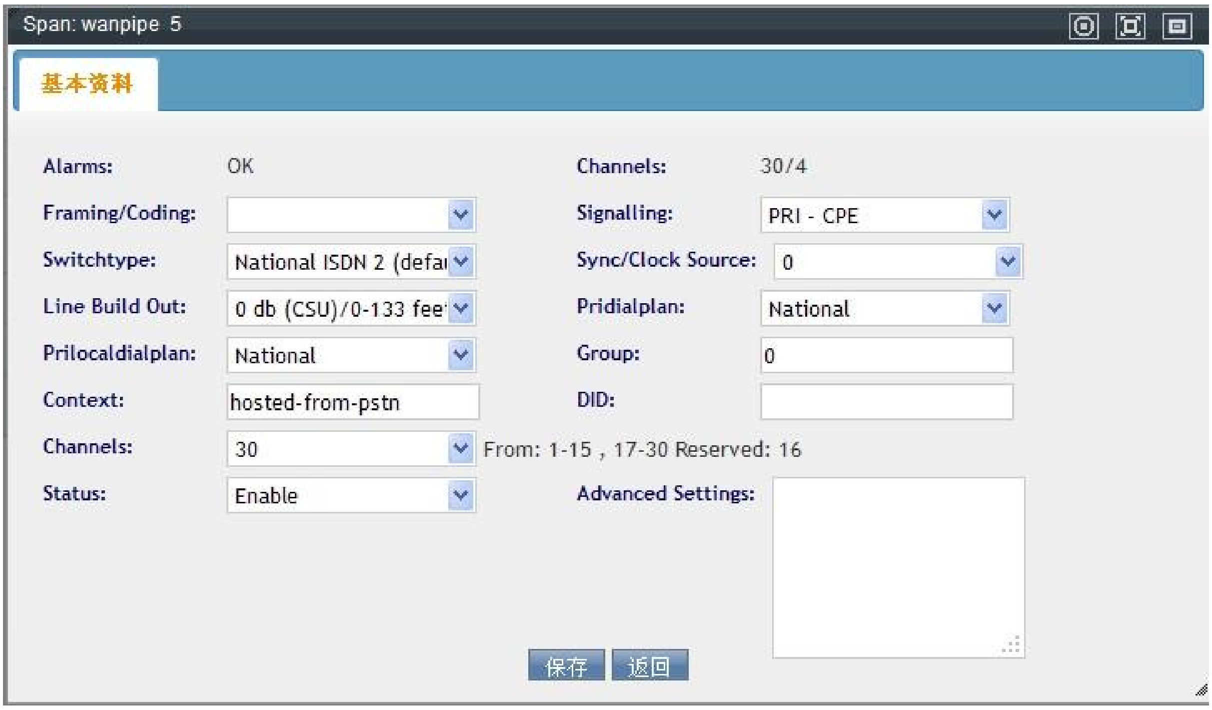
3.18.DAHDI

On the leftmenu,click[**Advanced**]–> [**DAHDI**],open the page



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

Digital Hardare Page：



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'

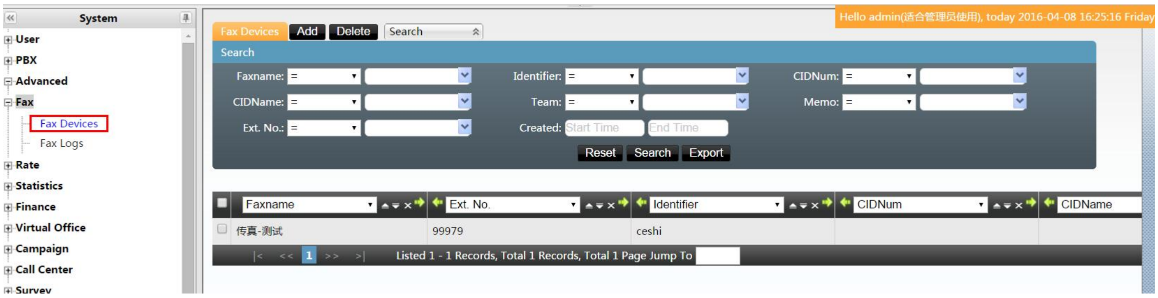
3.20.Voice Messages

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:

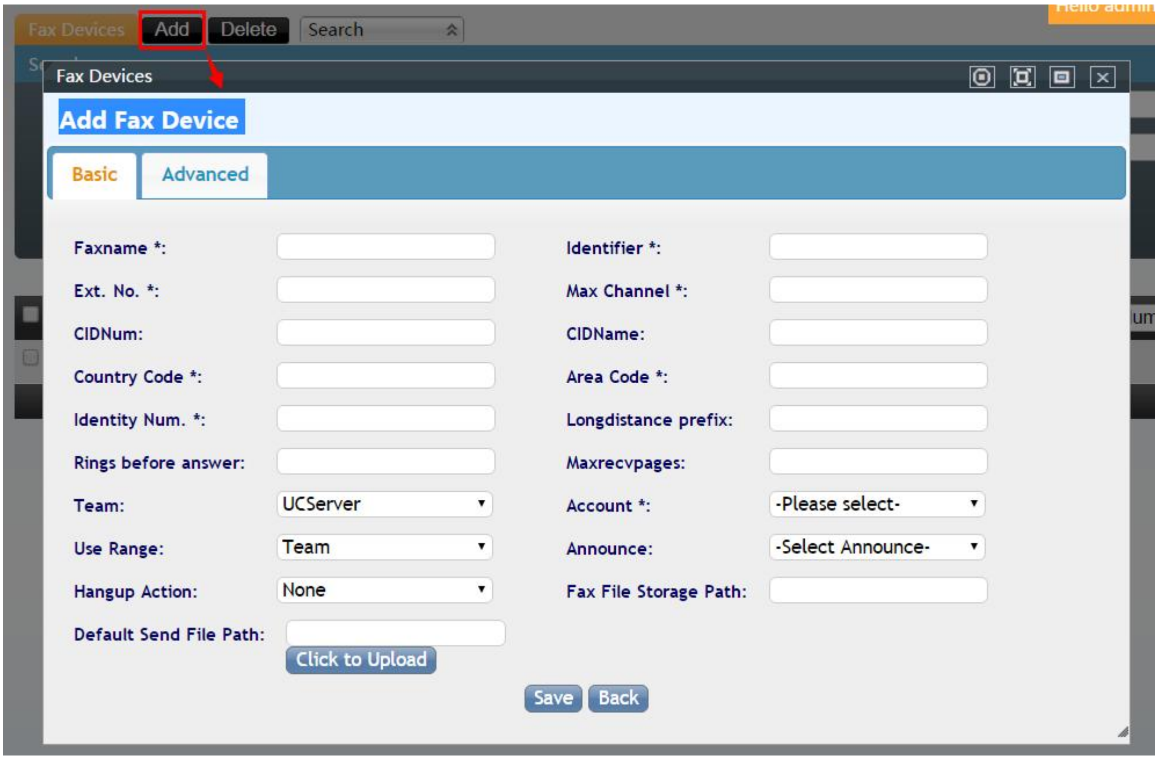
Faxname：Name this fax device

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:

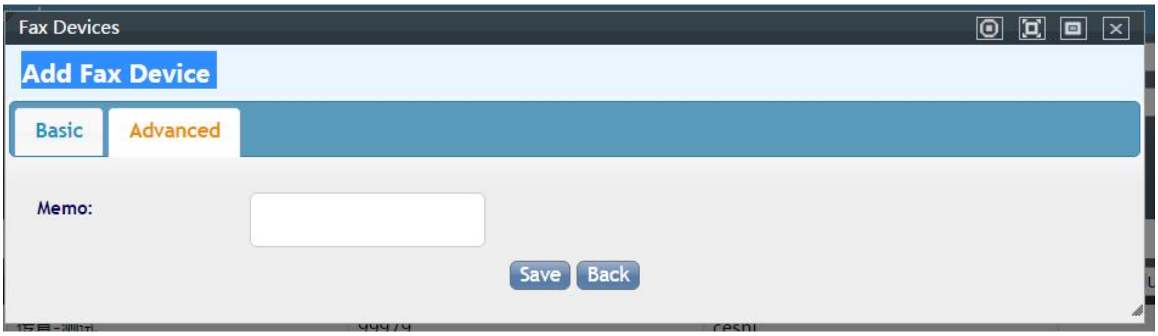
Rings before answer：

Maxrecvpage:

Team：Which team this fax device belongs to

Account：The accounts can use this fax

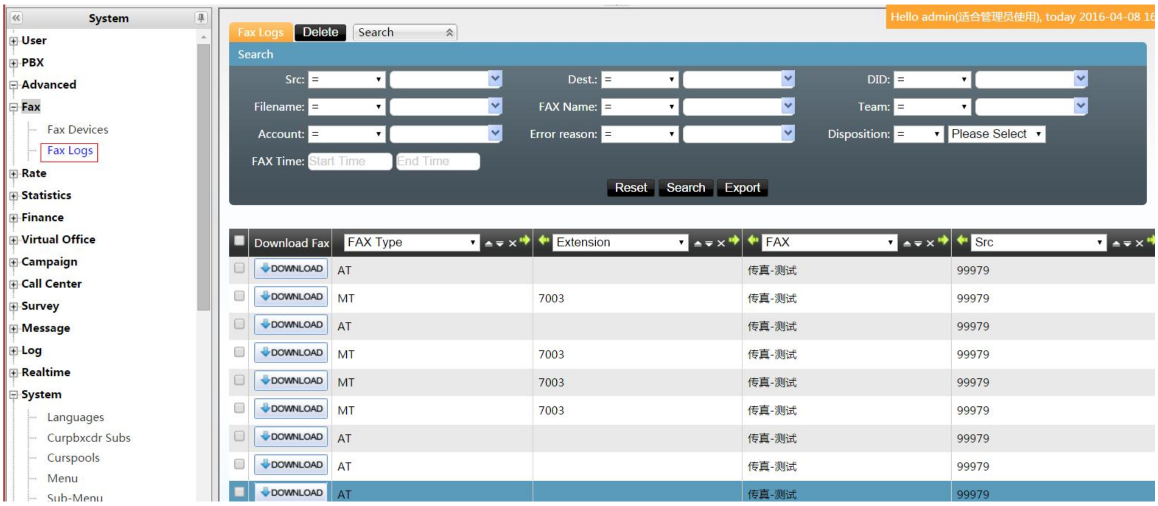
Use Range:
Announce:
Hungup Action:
Fax file storage path:
Default send path:
Click Advanced to enter the advanced page:



Meno: Give and 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 leftmenu,click[**Advanced**]-> [**Fax Log**],open the page.
The received fax are all listed here, you can download or delete them.



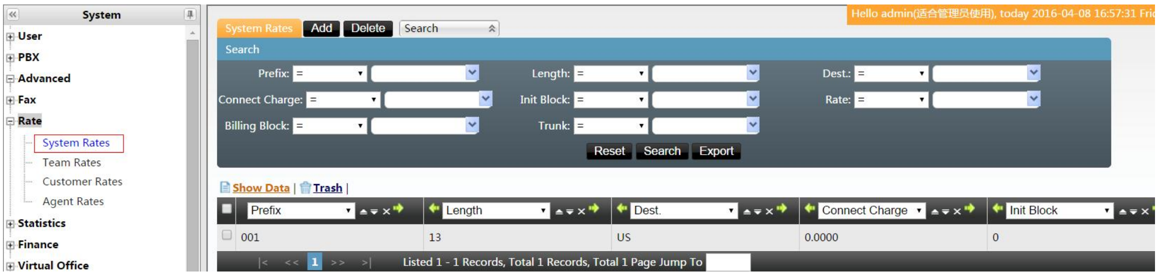
5 Rate

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 carculate the cost of this call via the matched rate, and add up to the call cost of the trunk and the system.

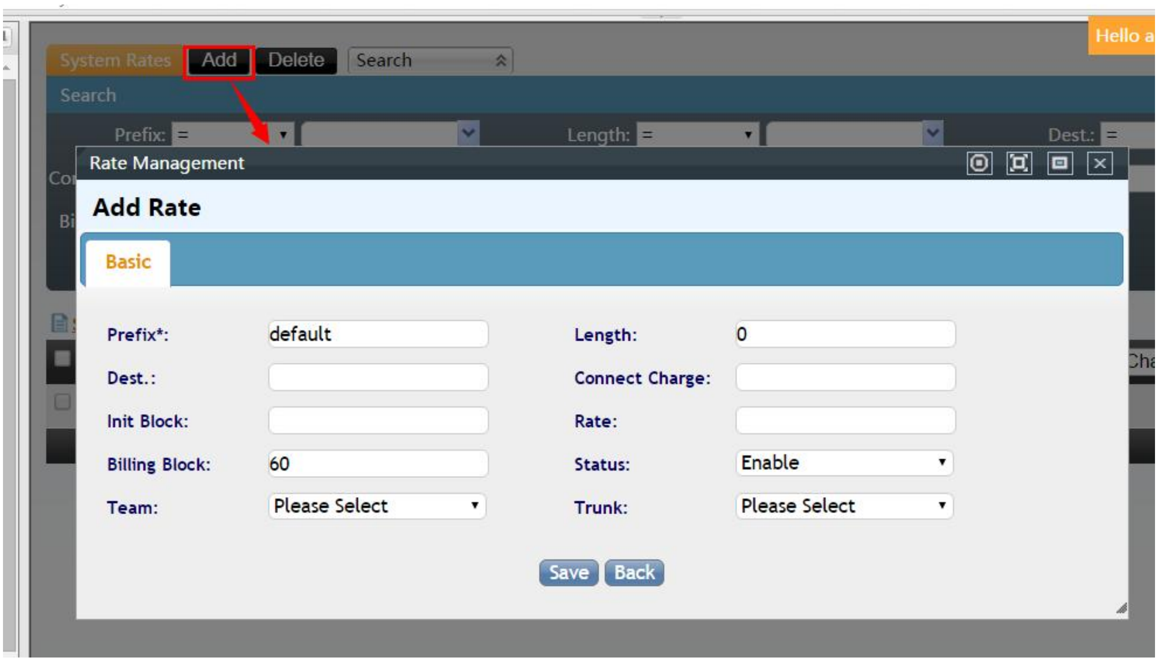
Only system administrator can set the system rate

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 uired 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 Amrican 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.

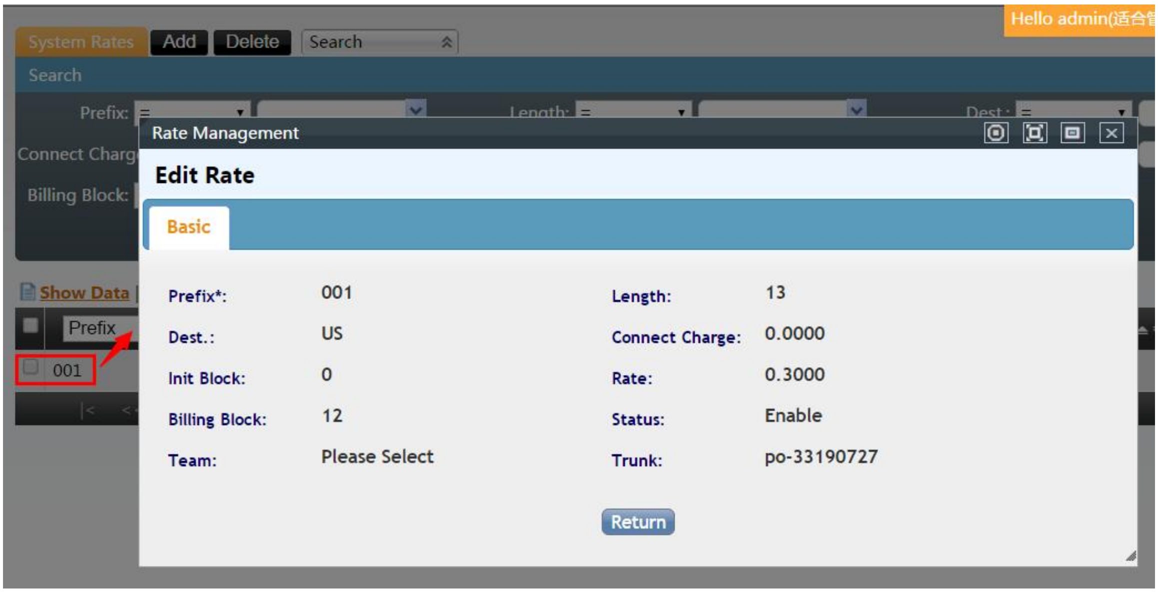
Optional fields

- **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 outbounding calls, will the system find the corresponding rate in the system rate.

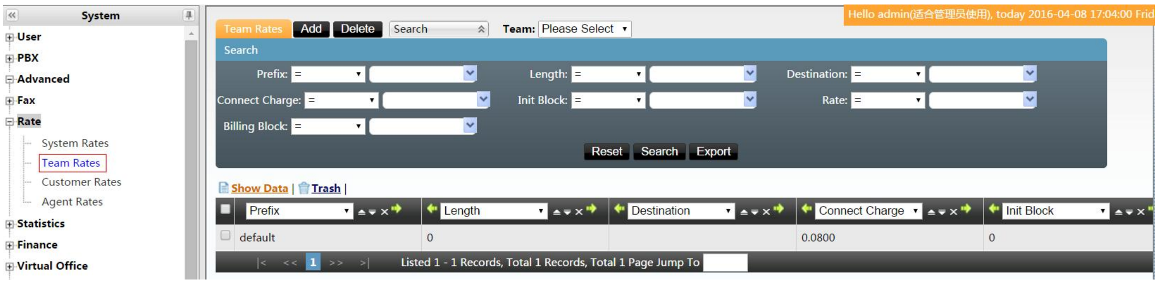
Edit system rate

Double click a rate to enter the edit page.



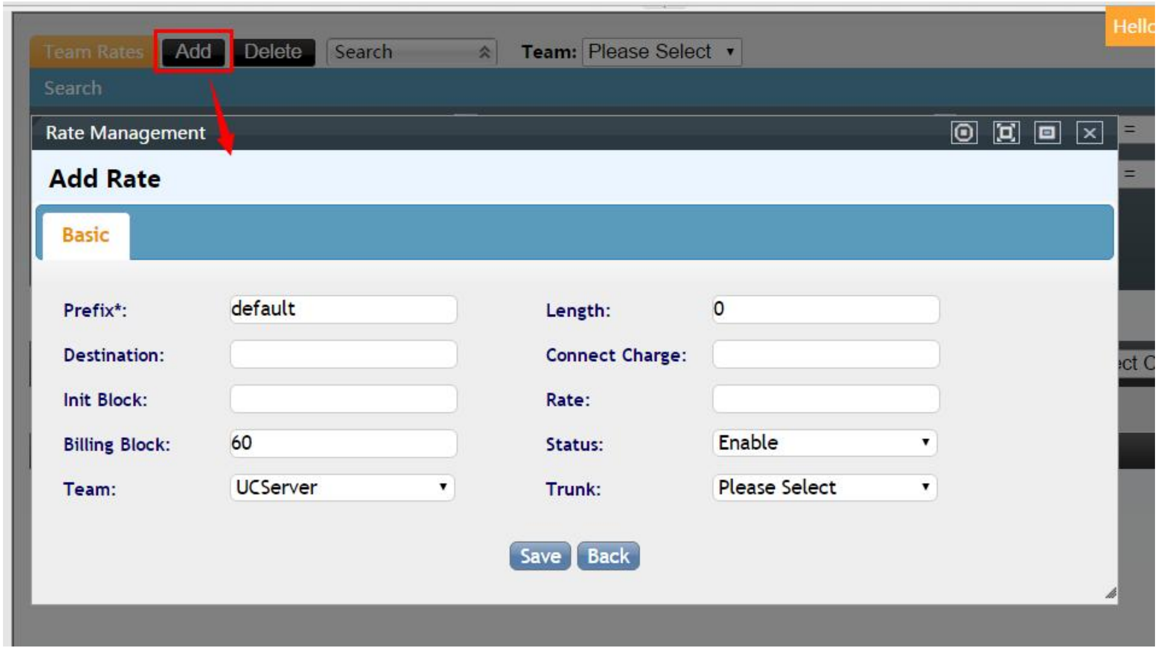
5.2 Team Rate

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 Amrican 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

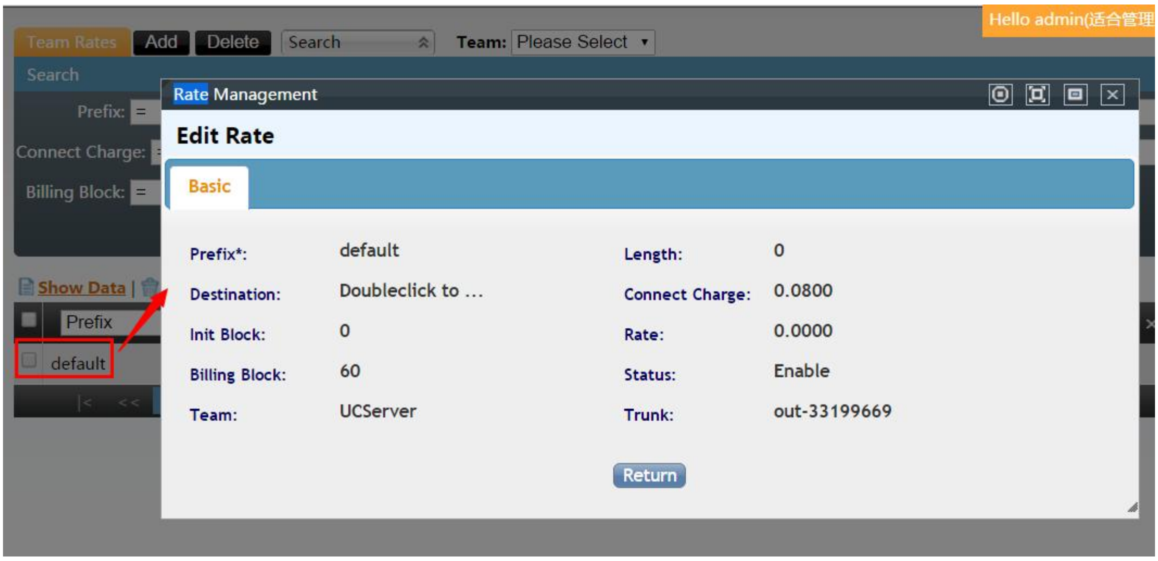
- **Destination**: Name this rate, for example “local calls”, “long distant calls” or “American”
- **Connect charge**: The rate once the call is connected
- **Init block**: The duration for the connect charge
- **Rate**: Rate per minute

- **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.



5.3 Customer Rate

Except for billing the device's outbounding 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:

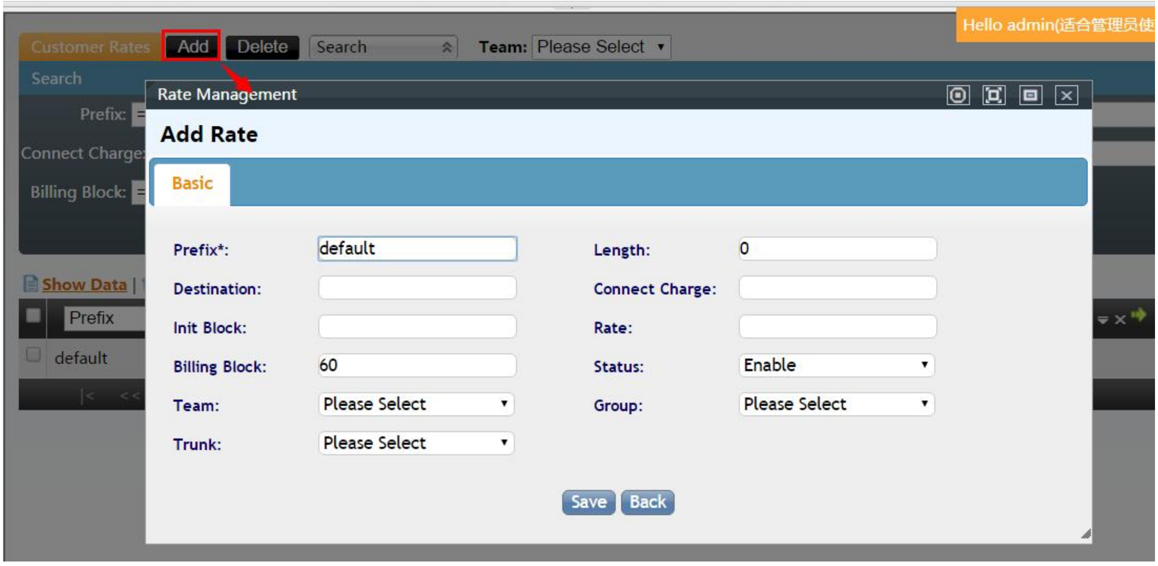
1. Prefix and length at the same time
2. Length match
3. Prefix match
4. Default rate match

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.



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 Amrican 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

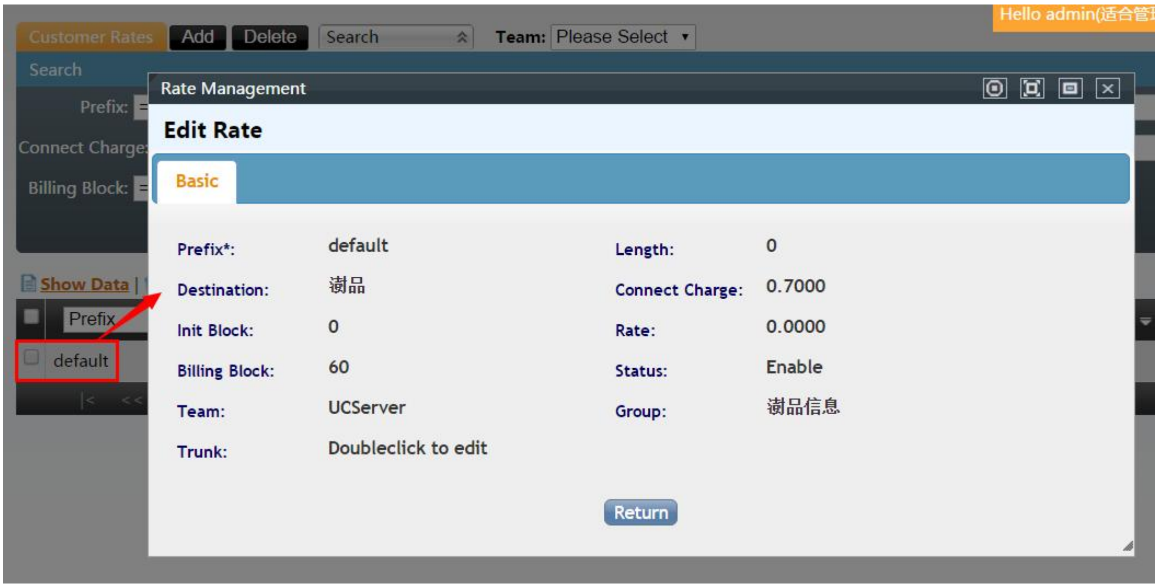
- **Destination**: Name this rate, for example "local calls", "long distant calls" or "American"
- **Connect charge**: The rate once the call is connected
- **Init block**: The duration for the connect charge
- **Team**: The team this rate applies to. If leave it blank, this rate would apply to all teams. 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

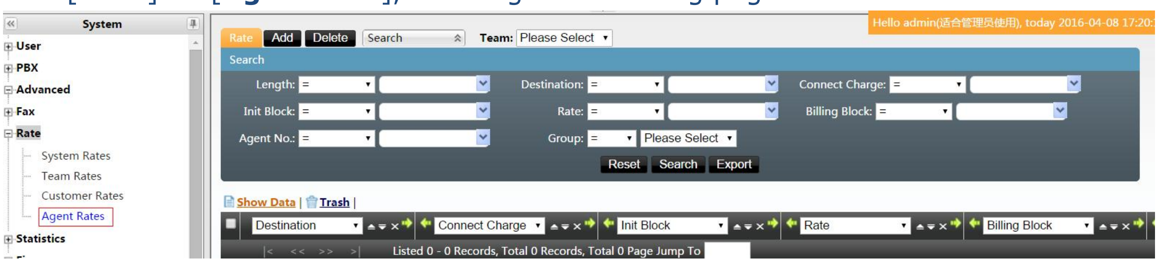
Double click the rate to open the edit page.



5.4 Agent Rate

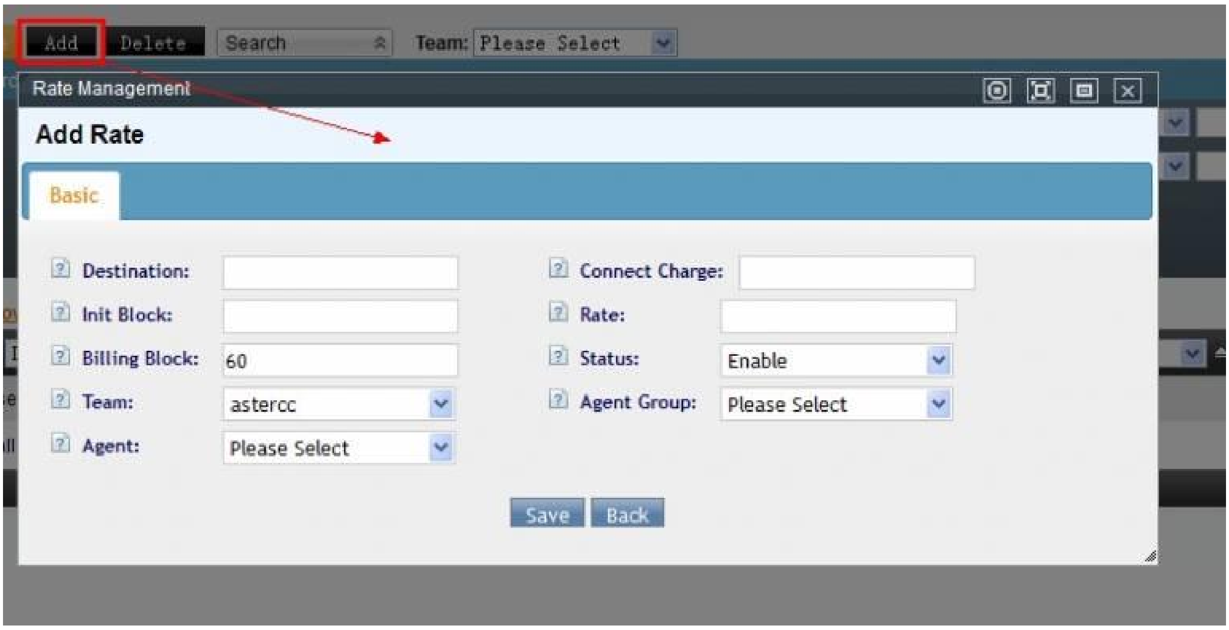
Agent rate is to bill the length of the agent answering incoming calls, thus no prefix and number length. By setting the agent inbound rate, every call an agent answered will gain the agent corresponding payment. This function is often used to carculate the payment of part-time agents.

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



Add agent rate

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

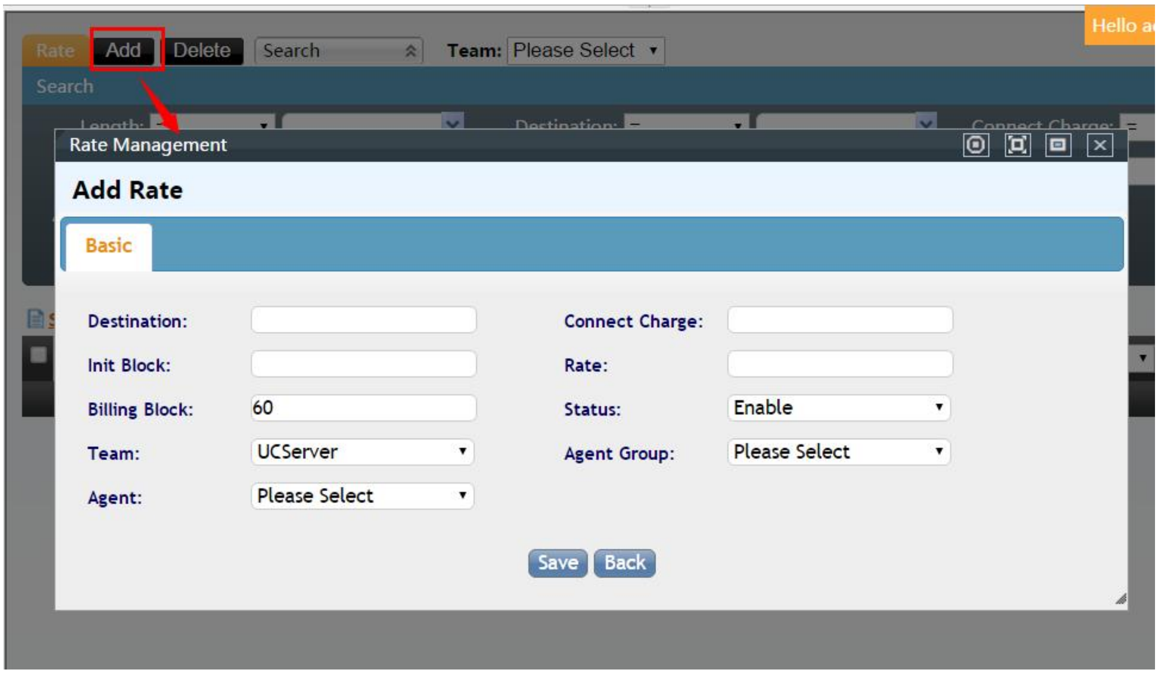


Required field

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

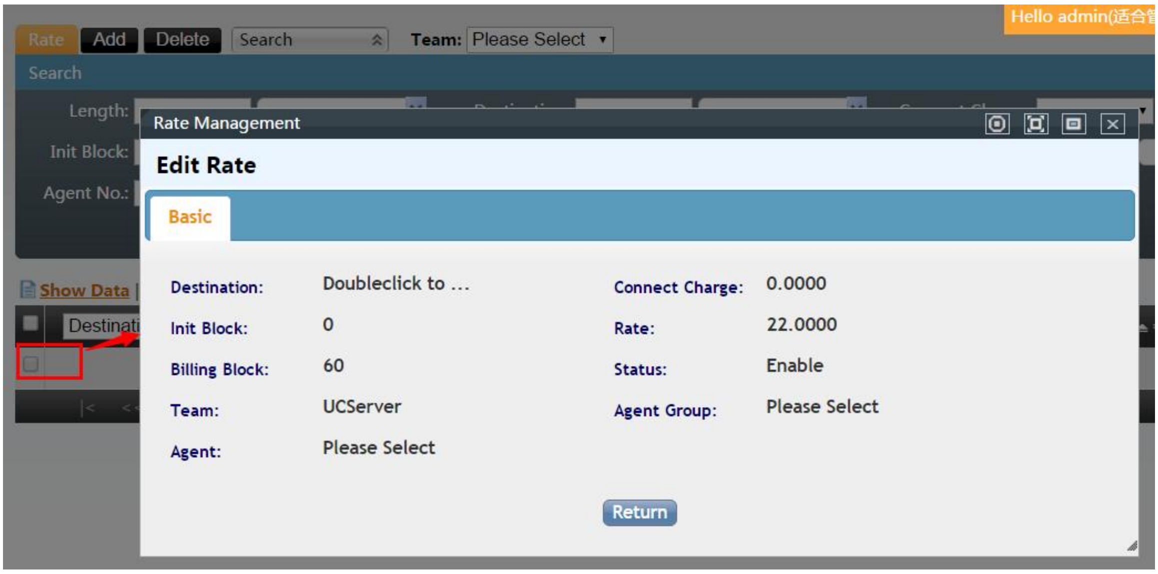
Optional fields

- **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.



Edit agent rate

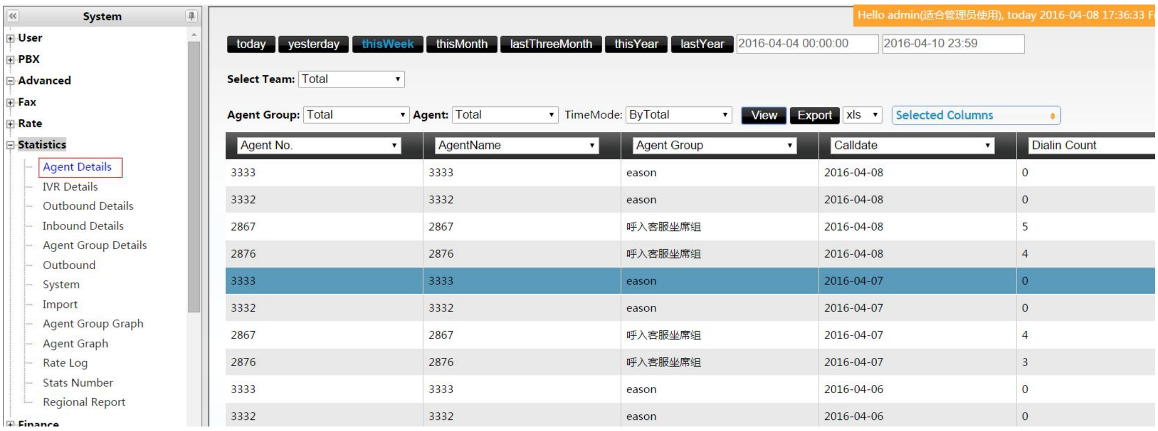
Click**[Save]**when finishing the page, then it will show the newly added data on the page. You can double click the field to re-open the edit page and edit them.



6 Statistics

6.1 Agent Details

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



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

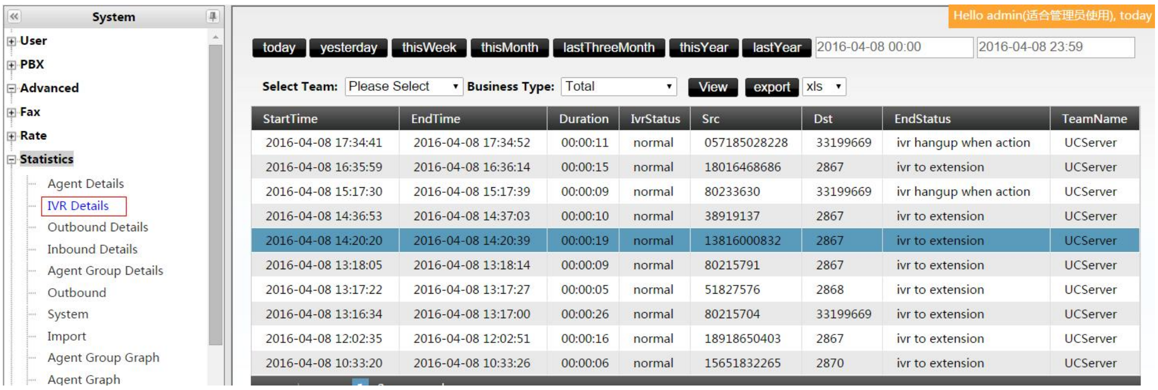
Statistics

- **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



Module Function: To check the IVR Status

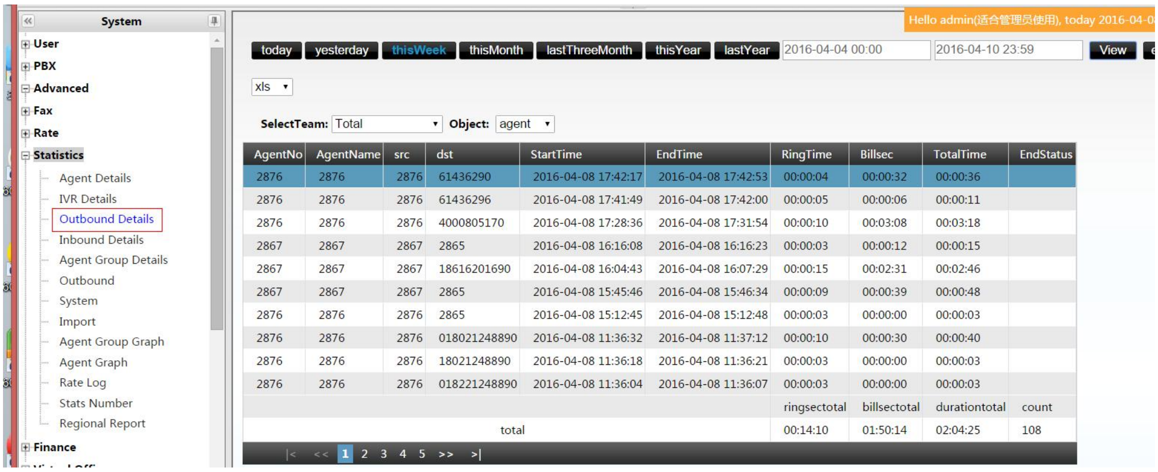
- Select the time range of the report
- Select how to list the result, view in page or export to excel/csv file

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



Module Function: the outbound calls details

- 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**：

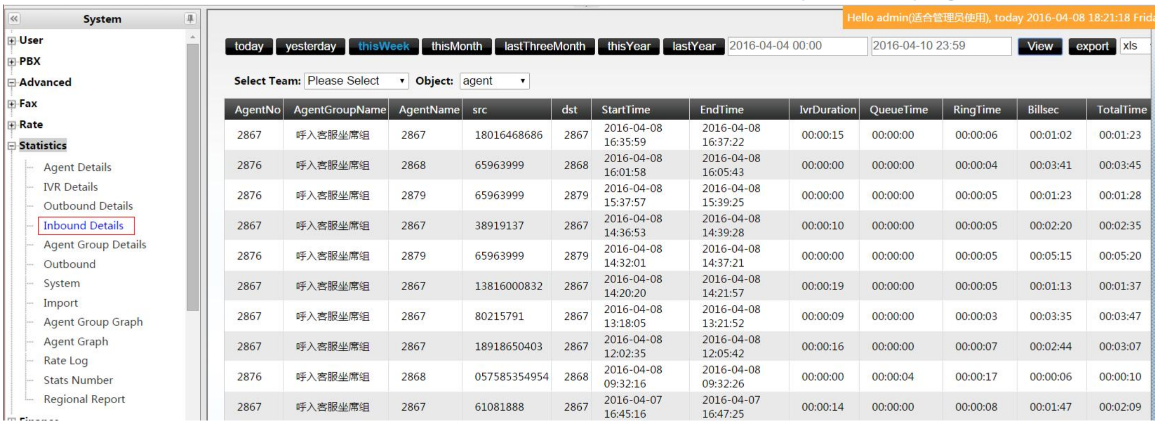
If calls established，ringtime=answered time-start time

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



Module Function：the inbound calls details

- 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

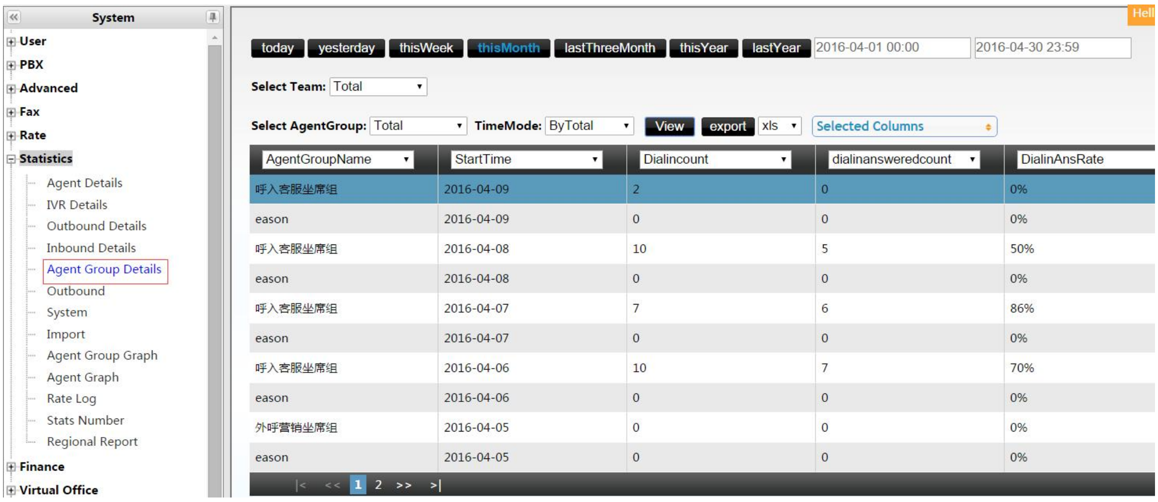
If calls fails，ringtime=end time-start time

- **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**]



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

Statistics

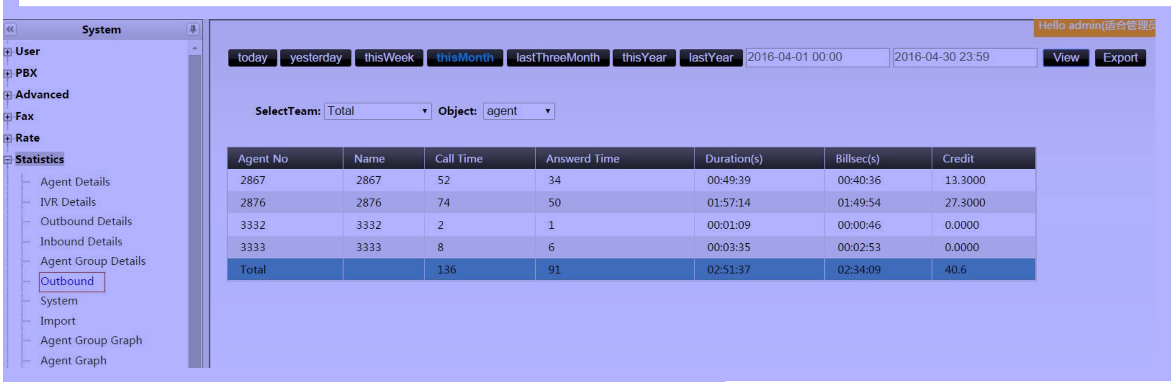
- **Dialincount**: Total number of inbound calls
- **Dialinansweredcount**: Answered calls number of inbound calls
- **DianinAnsRate**: (Dialinansweredcount / Dialincount) x 100%
- **DialinAvgSec**: Agent Talking/Dialincount
- **AgentRingAvgSec**: Inbund Ringing/Dialincount
- **AvgQueueSec**: Waiting time of answered calls/Dialinansweredcount
- **AnsweredIn10Rate**: AnsweredIn10Rate/(AnsweredIn10Rate+AnsweredIn20Rate+AnsweredIn30Rate+AnsweredIn60Rate+AnsweredOut60Rate)
- **AnsweredIn15Rate**: (AnsweredIn10Rate+AnsweredIn15Rate)/(AnsweredIn10Rate+AnsweredIn20Rate+AnsweredIn30Rate+AnsweredIn60Rate+AnsweredOut60Rate)
- **AnsweredIn20Rate**: (AnsweredIn10Rate+AnsweredIn15Rate+AnsweredIn20Rate)/(AnsweredIn10Rate+AnsweredIn20Rate+AnsweredIn30Rate+AnsweredIn60Rate+AnsweredOut60Rate)

- **AnsweredIn30Rate**: (AnsweredIn10Rate+AnsweredIn15Rate+AnsweredIn20Rate+AnsweredIn30Rate)/(AnsweredIn10Rate+AnsweredIn20Rate+AnsweredIn30Rate+AnsweredIn60Rate+AnsweredOut60Rate)
- **AnsweredIn60Rate**: (AnsweredIn10Rate+AnsweredIn15Rate+AnsweredIn20Rate+AnsweredIn30Rate+AnsweredIn60Rate)/(AnsweredIn10Rate+AnsweredIn20Rate+AnsweredIn30Rate+AnsweredIn60Rate+AnsweredOut60Rate)
- **AnsweredOut60Rate**: AnsweredOut60Rate/(AnsweredIn10Rate+AnsweredIn20Rate+AnsweredIn30Rate+AnsweredIn60Rate+AnsweredOut60Rate)
- **Dialinbillsec**: ringing and talking time of inbound calls
- **Dialoutcount**: total number of outbound calls
- **Dialoutansweredcount**: answered calls number in outbound calls
- **DialoutAnsRate**: Dialoutansweredcount/Dialoutcount x 100%
- **DialoutAvgRingSec**: Totoal ring duration of outbound calls / Dialoutcount
- **DailoutAvgAnswerSec**: Total answered time of outbund calls / Dialoutansweredcount
- **DialoutBillsec**: Totoal 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
- **onholdsecAvgt**: Average onhold duration
- **giveupcount**: Total number of abandon calls
- **dialingiveupAvg**: Average waiting time for abandon calls in inbound calls,
- **giveuprate**: giveupcount/dialincound x 100%
- **dialintransfer**: total transfer number for inbound calls
- **dialouttransfer**: total transfer number for outbound calls
- **dialintransferrate**: dialintransfer/Dialinansweredcount x 100%
- **dialinconsultrate**: Dialinconsultcount/Dialinansweredcount x 100%
- **dialinconfrate**: Dialincoufcount/Dialinansweredcount x 100%
- **onholdrate**: onholdcount/Dialinansweredcount x 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

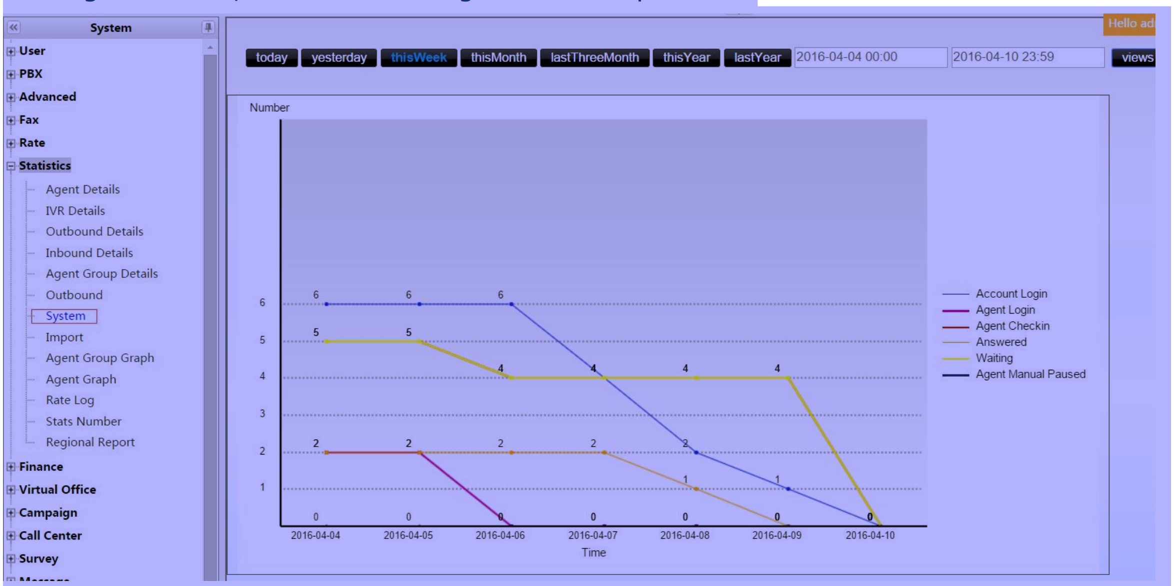
On the leftmenu,click[**Statistics**]-> [**Outbound**],open the page

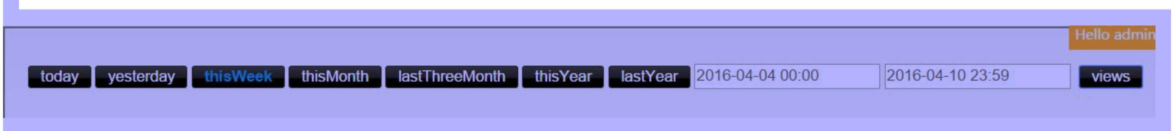


Module Function: To check agent's workload

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

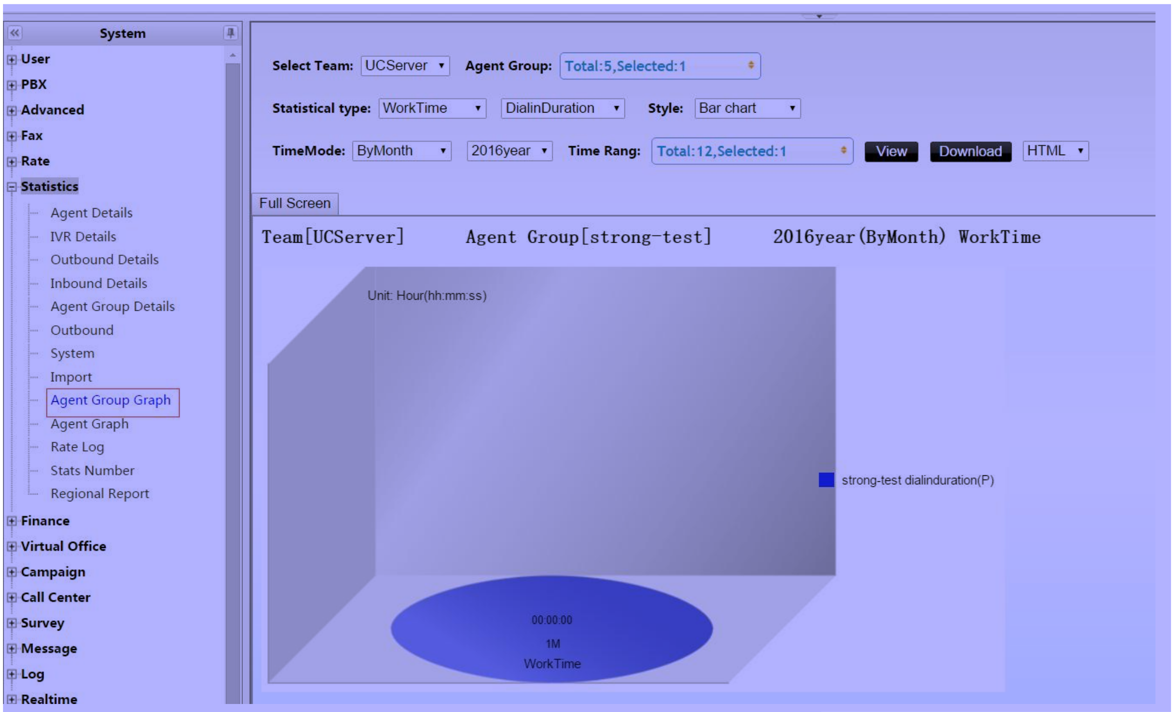
- **Account Login :** how many account login the system when every time point
- **Agent Login :** How many agent login the system to work.The agent need to use the account to login the system,so the amount of agent login is included in the amount of account login.
- **Agent Checkin :** how many agent 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 leftmenu,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 leftmenu,click[**Statistics**]–> [**Agent Group Graph**],open the page



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

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;

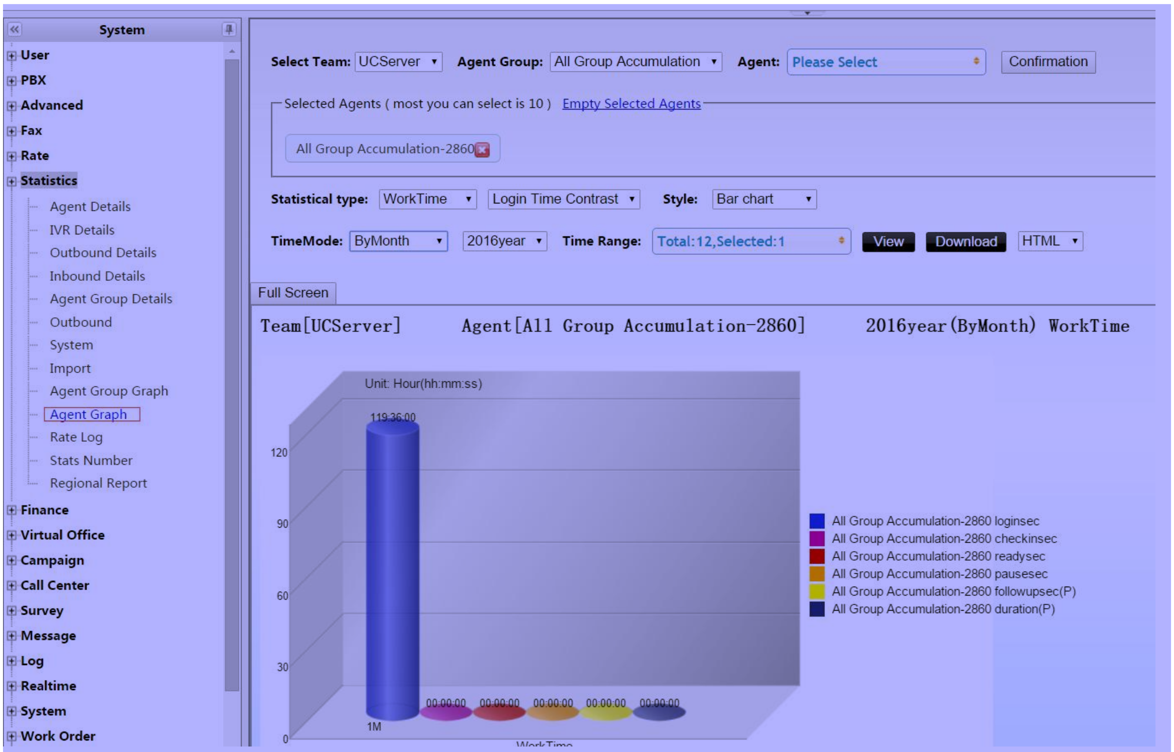
Time Mode: Select the time range of the report

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: 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;

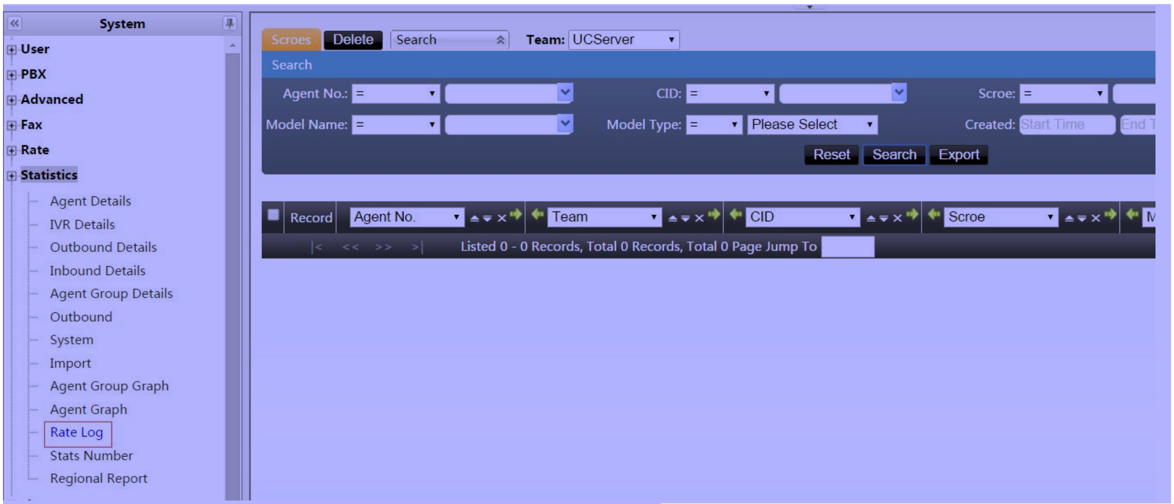
Time Mode: Select the time range of the report

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



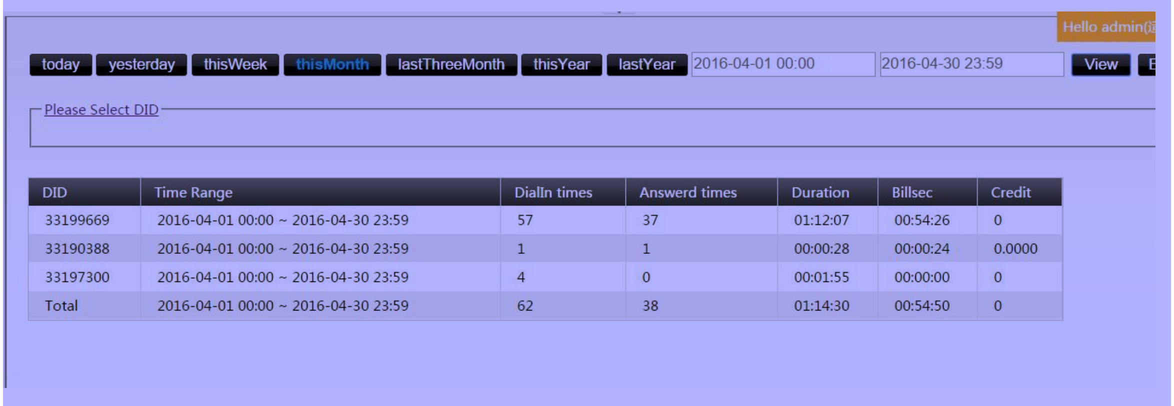
Module Function: Check a group's rate log;

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

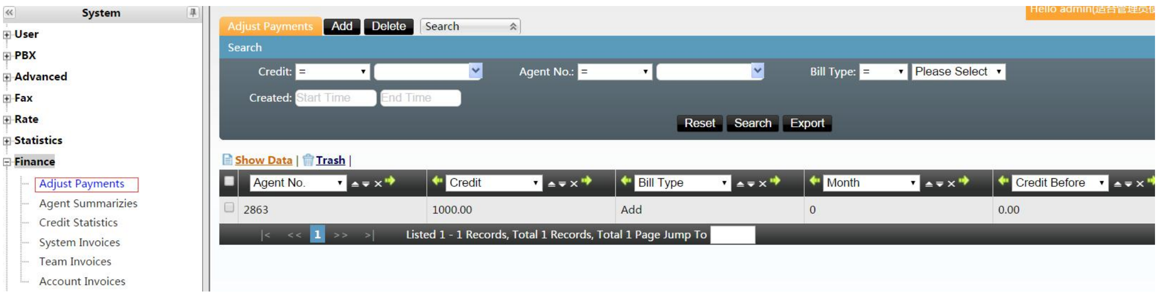
Module Function: To check the use of DIDs in a region

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

7 Finance

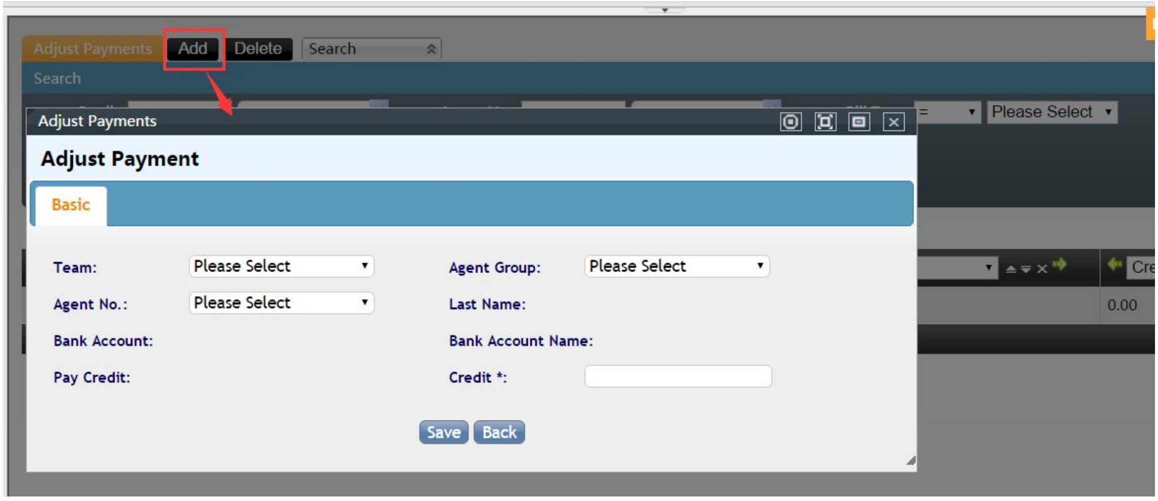
7.1 Adjust Payment

On the leftmenu,click[**Finance**]–> [**Adjust Payment**] to open the page



Add Payment

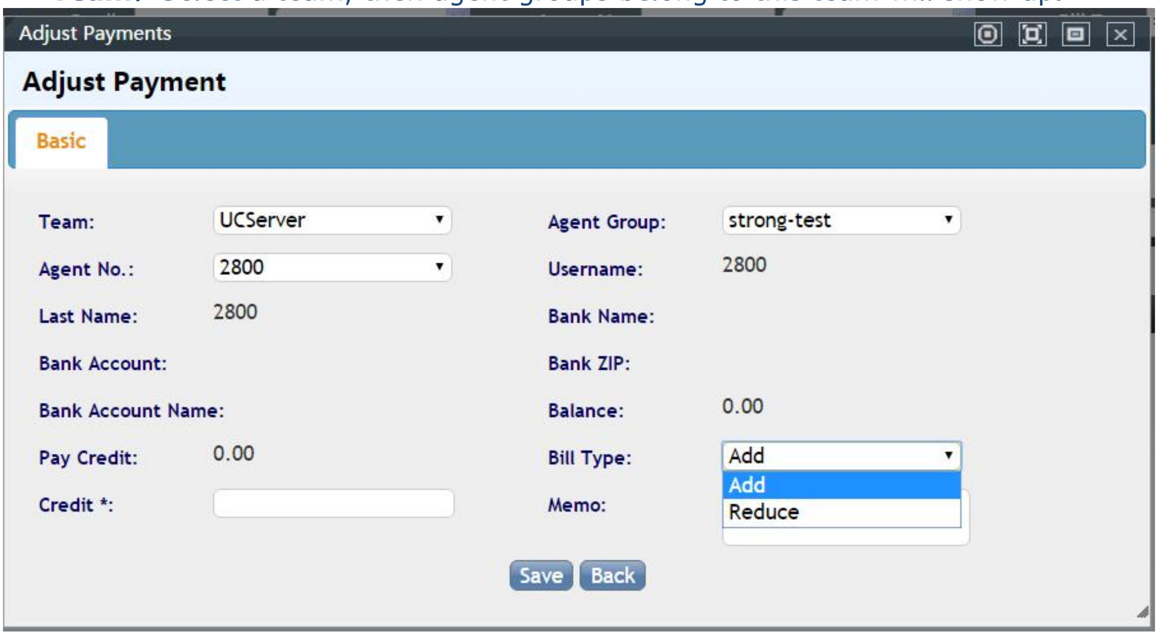
Click**[Add]**to enter the add payment page.



Module Function: to adjust agent's credit

Required fields

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



- **Agent Group:** Select the agent group, then the agent numbers belong to this group will list up.
- **Agent No.:**Select an agemt 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.

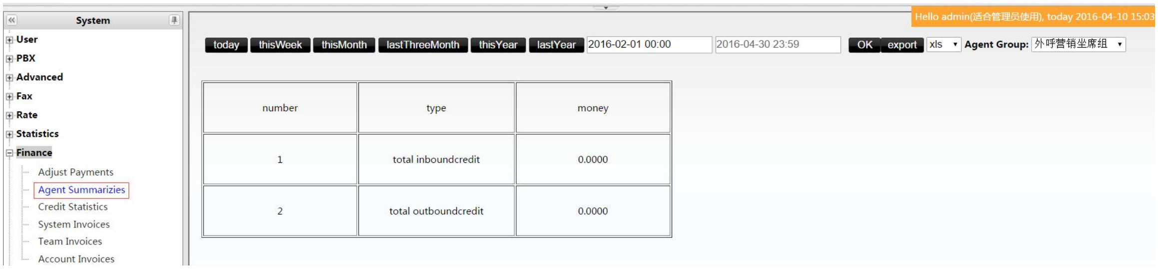
In addition, if logo in with team leader account, there will be only one team showing under Team field, that is the team which the account belongs to.

- **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

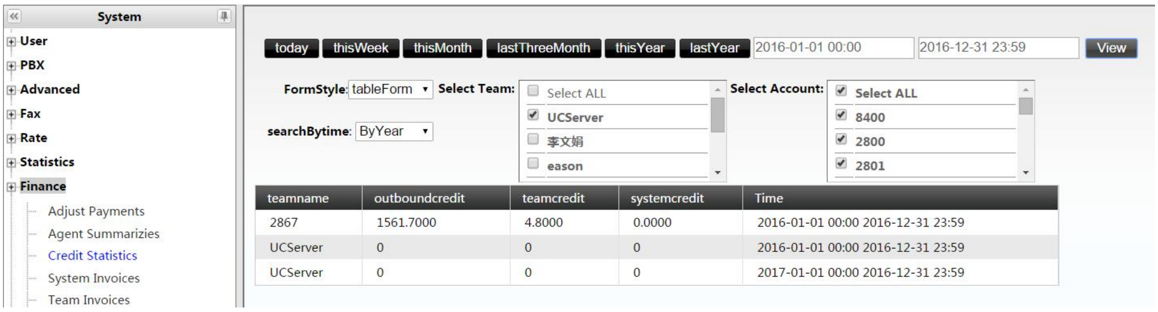
On the leftmenu,click[**Finance**]–> [**Agent Summarizies**] to open the page



- 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

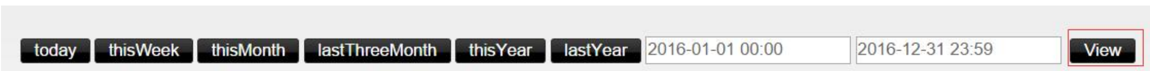
7.3 Credit Statistics

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



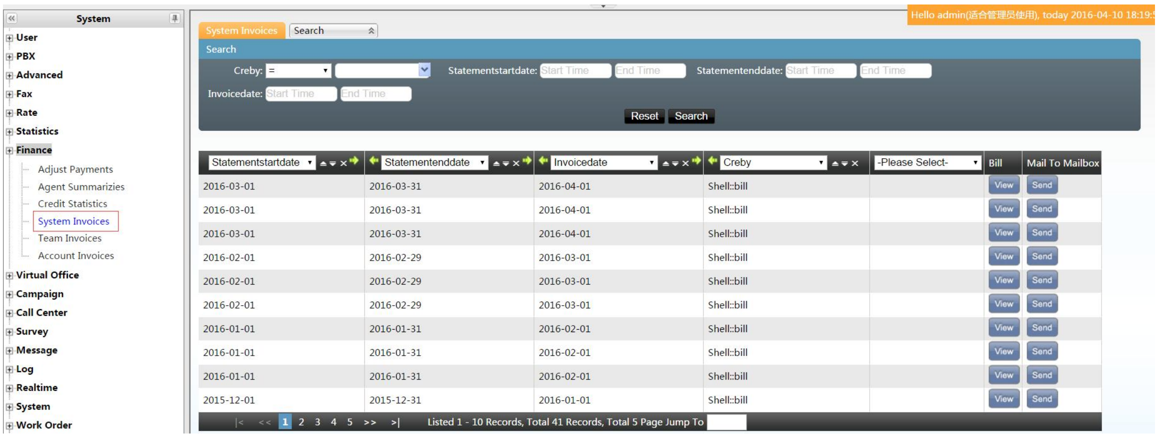
Module Function: To check the credit status of accounts and teams;

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



Module Function: If you enable the invoice function,then the systm will generate a system invoice for you. You can check your invoice online or email to a mailbox.

All the system administrators' invice 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

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
[redacted]	966	0

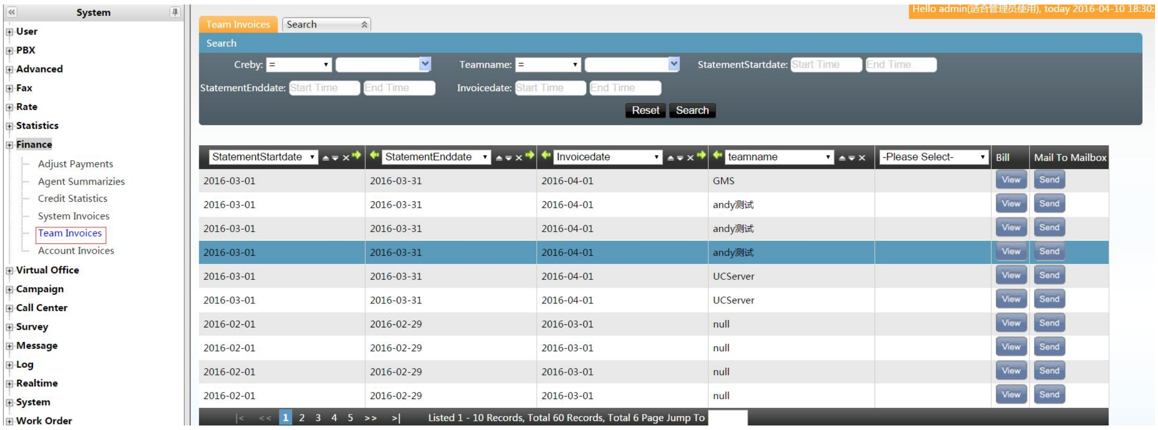
本期应还金额 Current Balance : ￥-2119

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 leftmenu,click[**Finance**]–> [**System Invoice**] to open the page



Module Function: If you enable the invoice function,then the systm will generate a system invoice for you. You can check your invoice online or email to a mailbox.

All the system administrators' invice will show on the front page. Please click [View] to check online or [Send] to send to default mailbox.

UCServer
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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

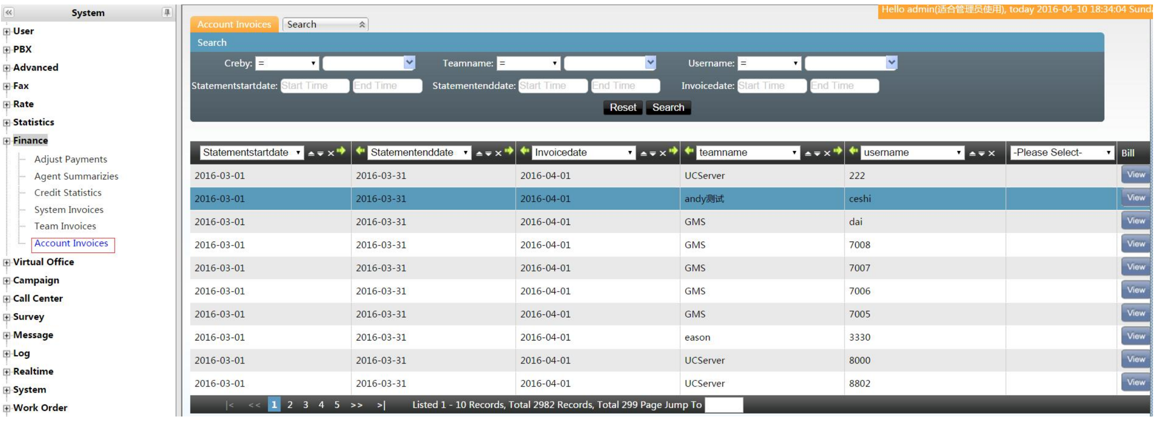
本期应还金额 Current Balance: ¥0

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 systm will generate a system invoice for you. You can check your invoice online or email to a mailbox.

All the system administrators' invice 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

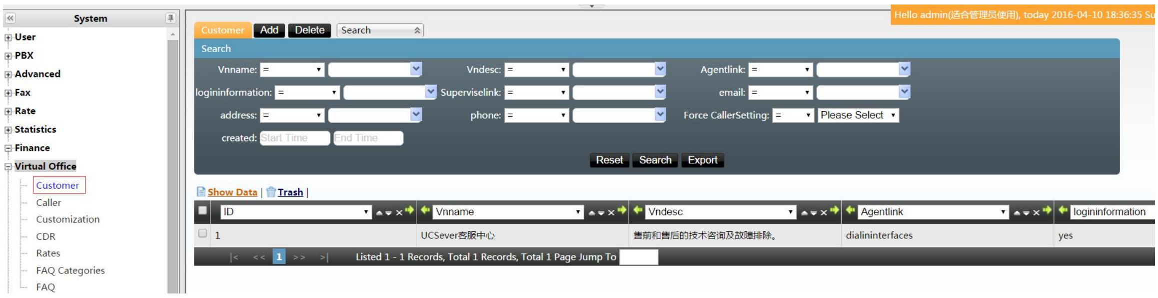
本期应还金额 Current Balance	=	上期账单金额 Balance B/F	-	上期支付金额 Payment	本期账单金额 New Charges	本期调整金额 Adjustment	利息 Interest
¥0		¥0		¥0	¥0	¥0	¥0

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

8 Virtual Office

8.1 Customer

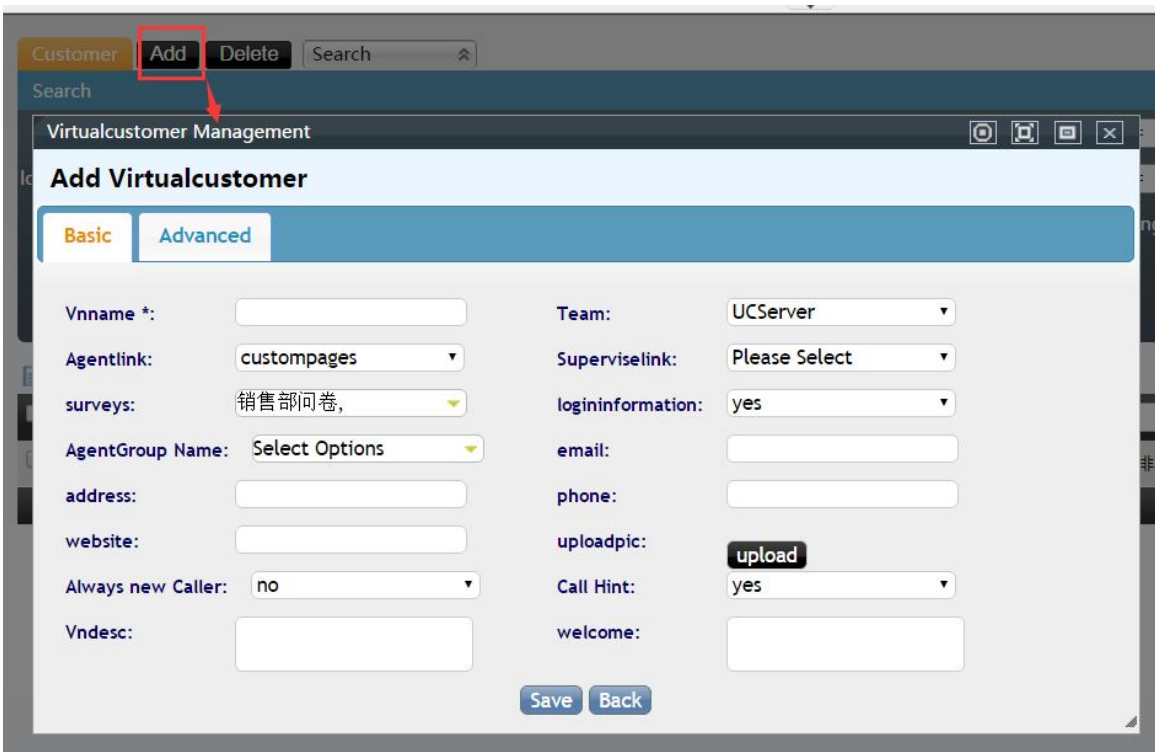
On the leftmenu,click[**Virtual Office**]-> [**Customer**] to open the page



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

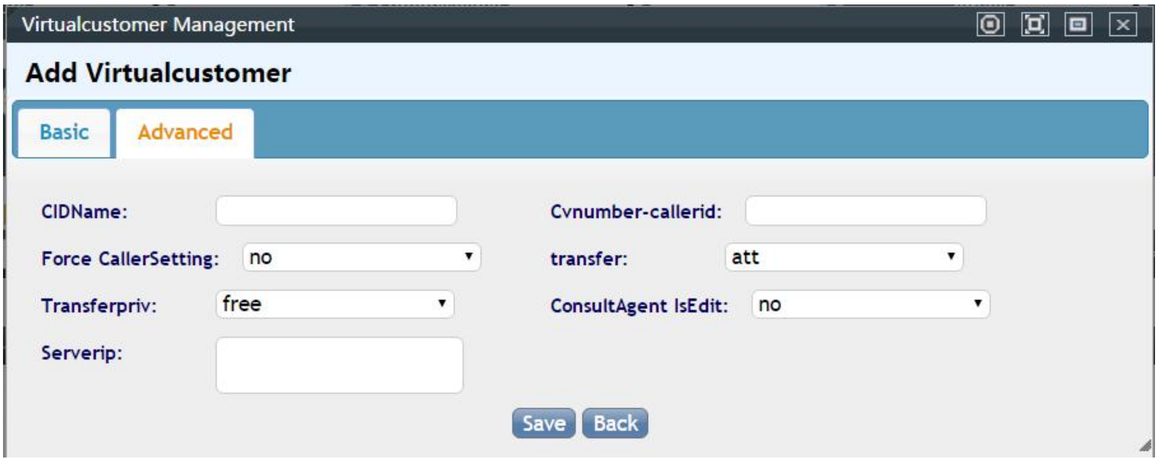
- **Vnname:** Name this virtual customer;
- **Team:** To which team this virtual customer belongs to;
- **Agentlink:** The agent 's link(customer company's call popup window)
- **Supervise Link:** The supervisor's link;
- **Surveys:** Can select one survey or multi surveys;

- **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 picuture, 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

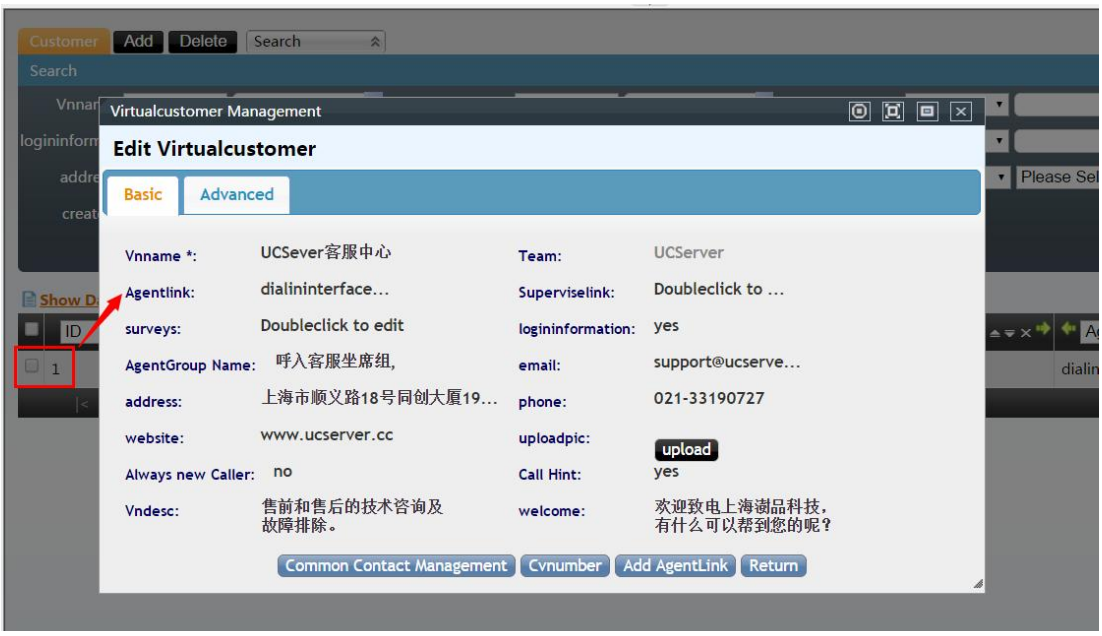


- **CIDName**: The CID name（Only for IP phones）
- **Cvnumber-callerid**: The CID numbers（Only for IP phones）
- **Force Caller Setting**:
- **Transfer**: To set the transfer type of the virtual customer, including attended transfer, blind transfer or both. This setting will be showed under the virtual 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.

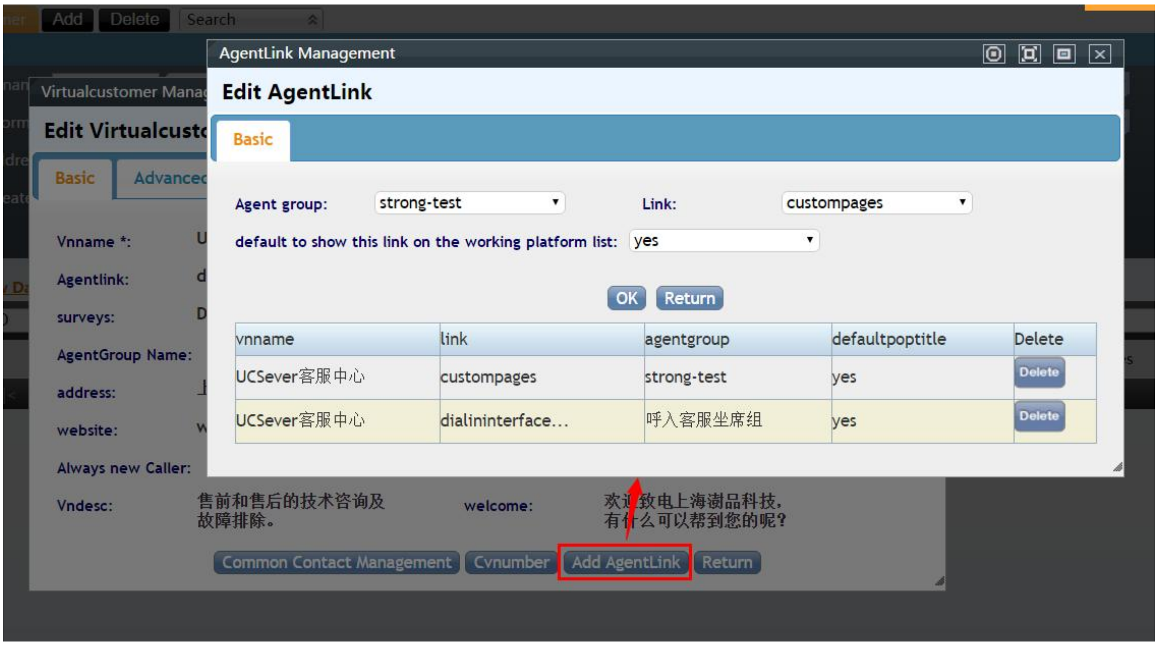
Click**[Save]**when finishing the page, then it will show the newly added data on the page.

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.



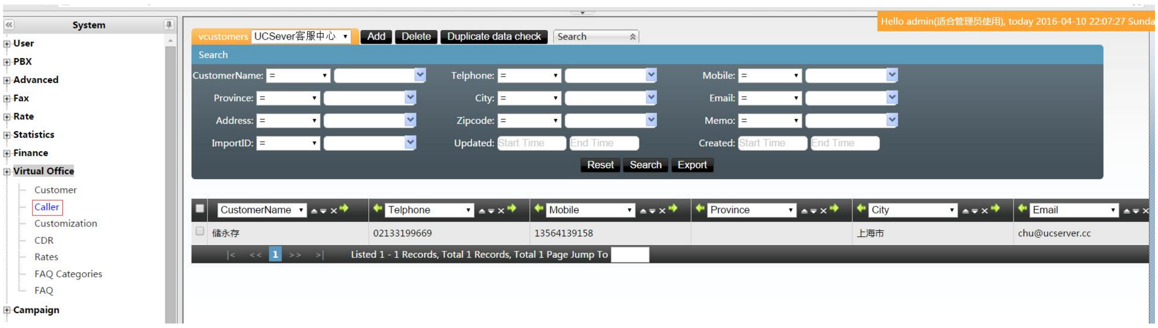
Module Function：To set different agent working platform for agent groups.

- **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.

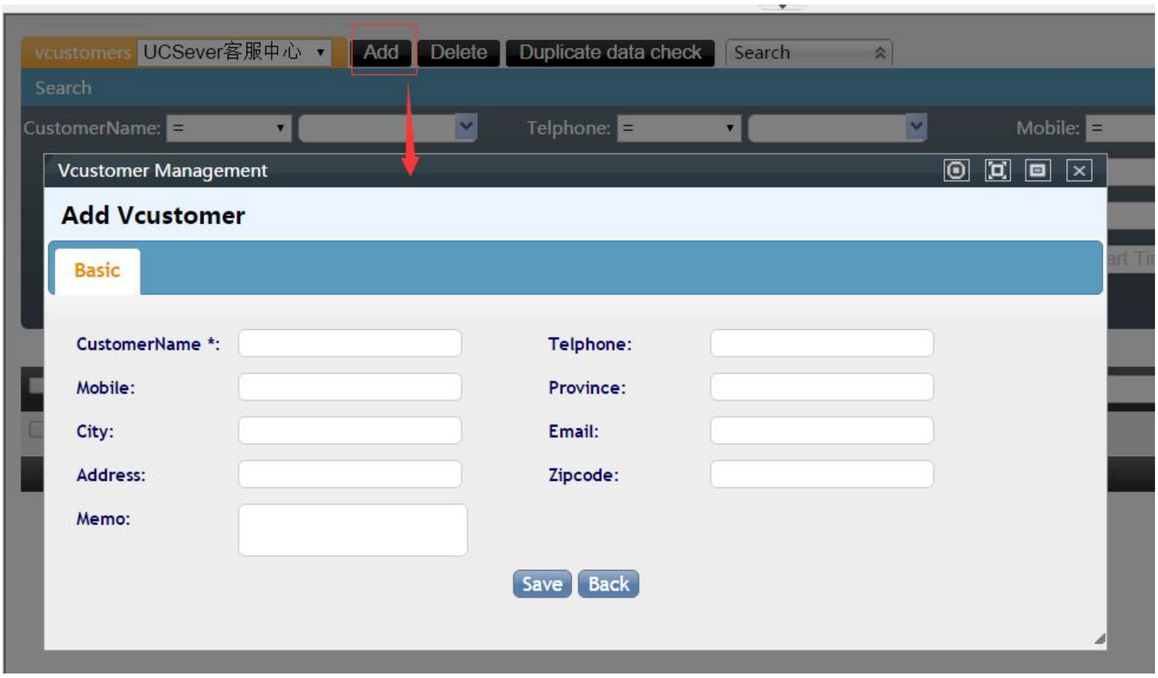
8.2 Caller

On the leftmenu,click[**Virtual Office**]–> [**Caller**] to open the page



Add Vcustomer

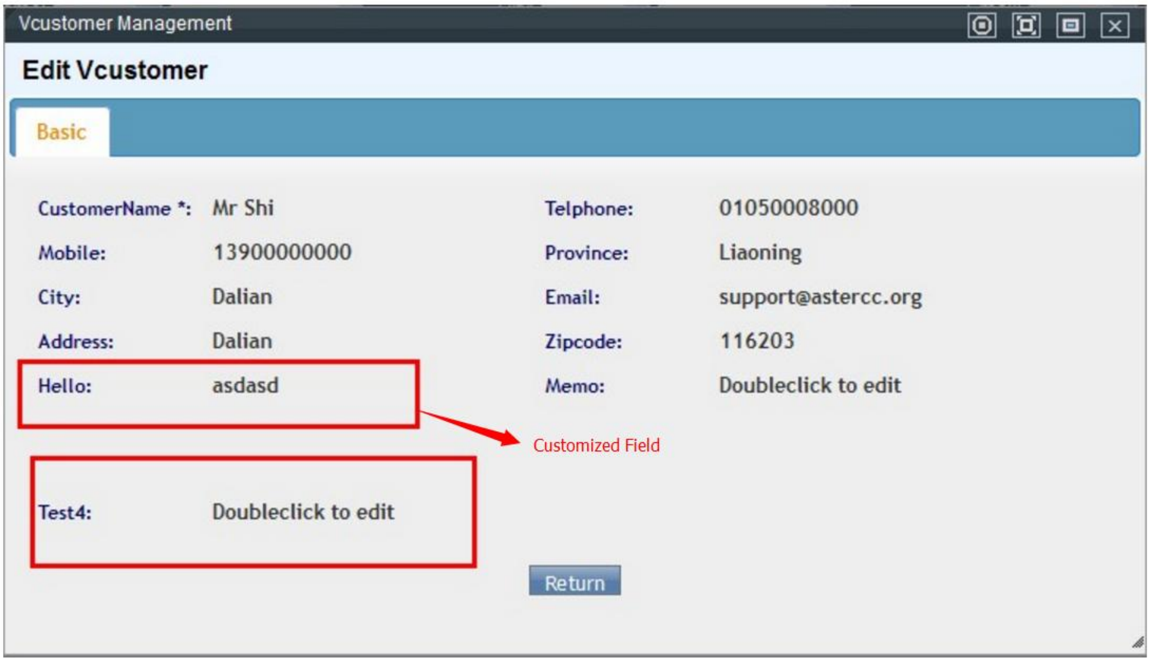
Click**[Add]**to enter the add Vcustomer page.



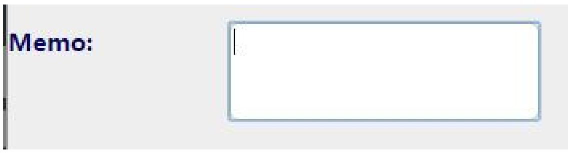
Fill the basic customer info. Click [Save] after finishing, the page will show the newly added the data..

Edit

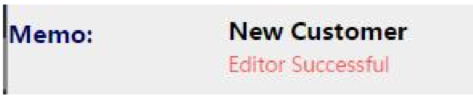
You can double click to open the edit page again to edit the data



Double click the field, it will turn to input field

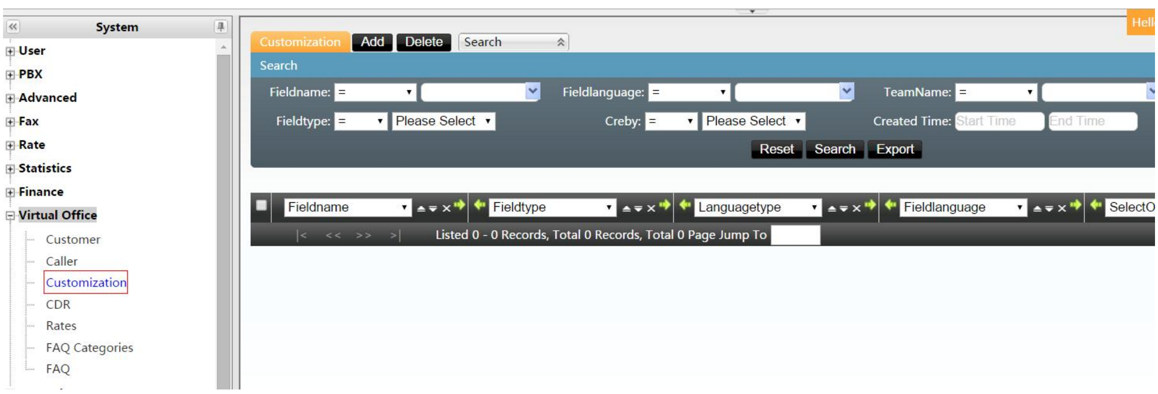


After input the value, click your mouse out of the input box, the data will be saved.



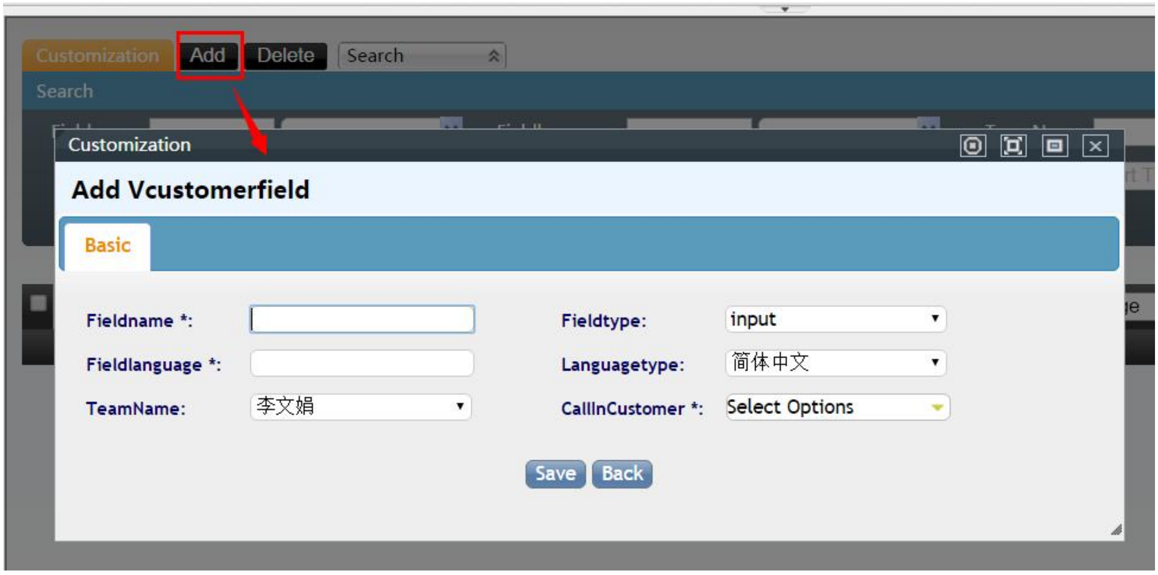
The fields in red box are customized fields.
You can go to Customizatiion setting to add them.

8.3 Customization



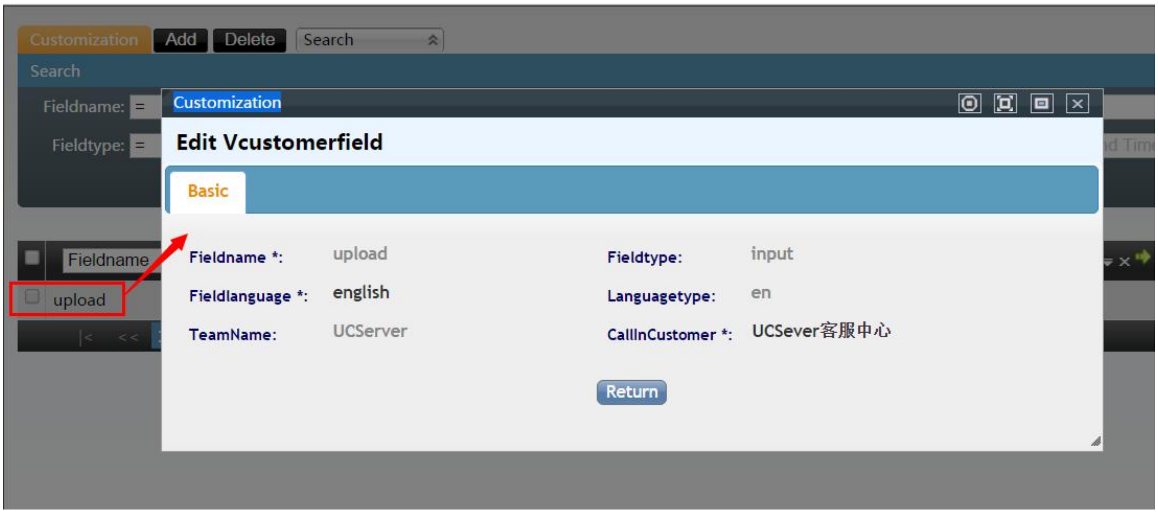
Module Function: To customize field forcallin customer for special requirement;

Add



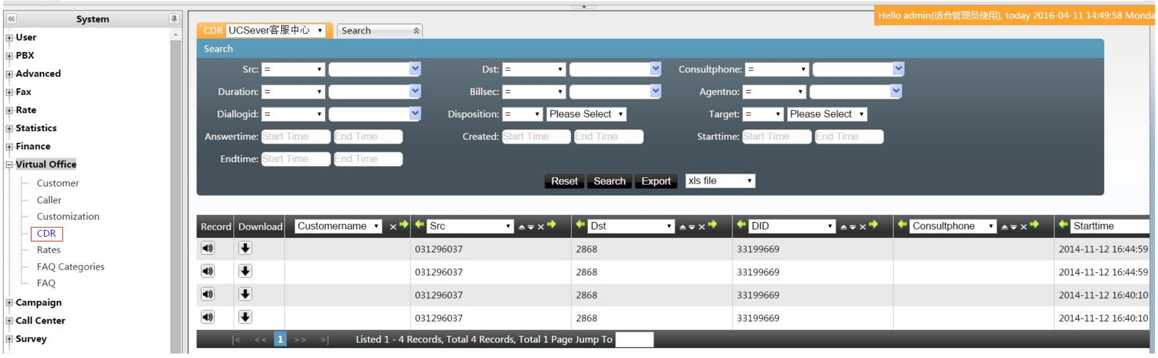
Fieldname: Name the field;
Fieldtype: Customized fields including input,select,text,upload,date,datetime and link
Fieldlanguage: The customized field’s language,the language should in the default language ;
Languagetype: In which language catalog this customized field belongs to;
TeamName: Choose the callin customer’s team name;
Callin Customer: To choose the target callin customers;

Edit



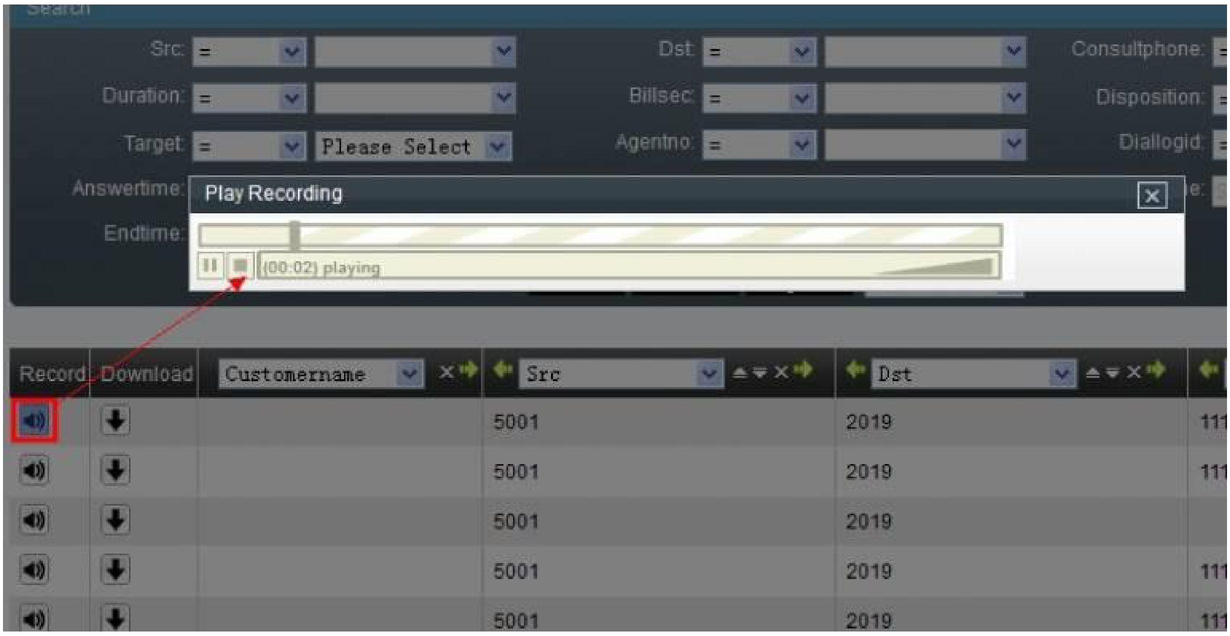
The gray field is can not be edited, only the black field is editable;

8.4 CDR

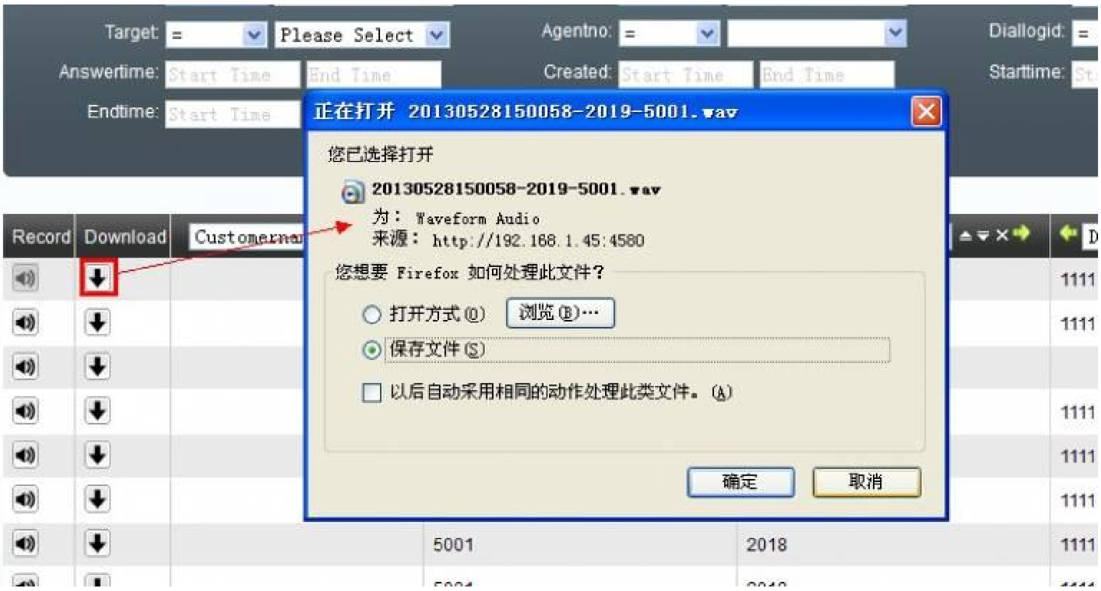


Module Function: To check the system's CDR info.

Can click  to listen the customer cdr,like this:

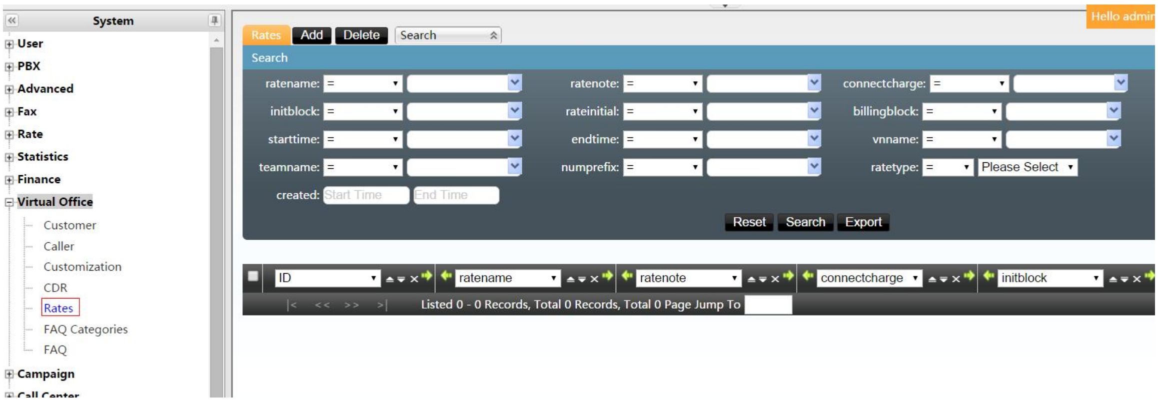


Can click  to download the cdr monitor like this:



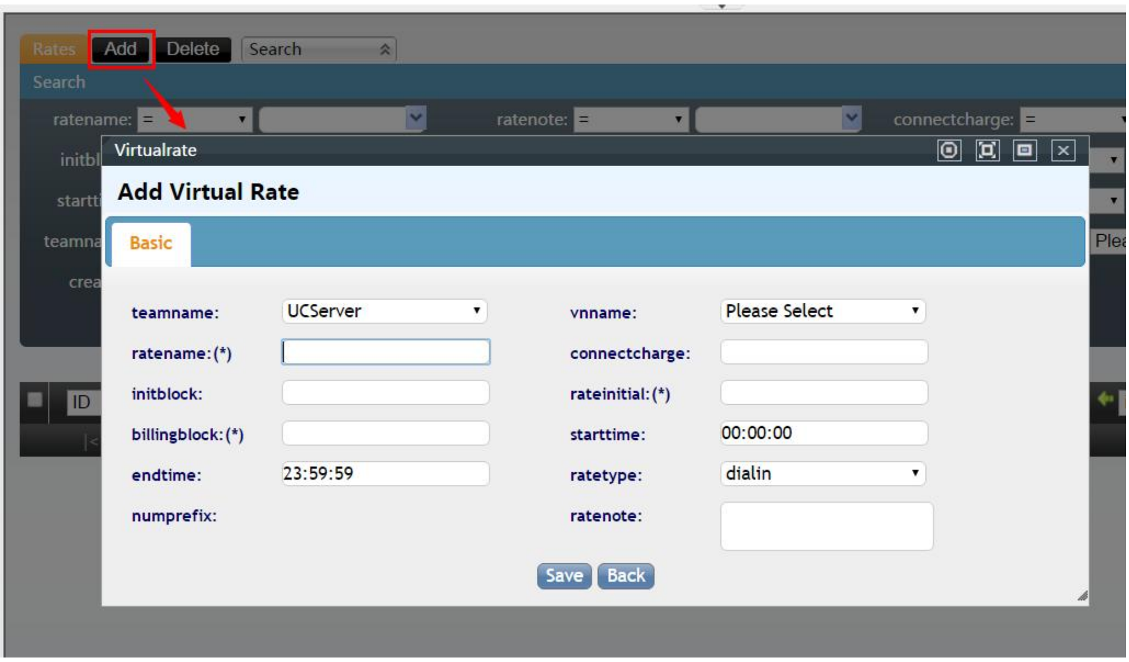
8.5 Rates

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:



Required

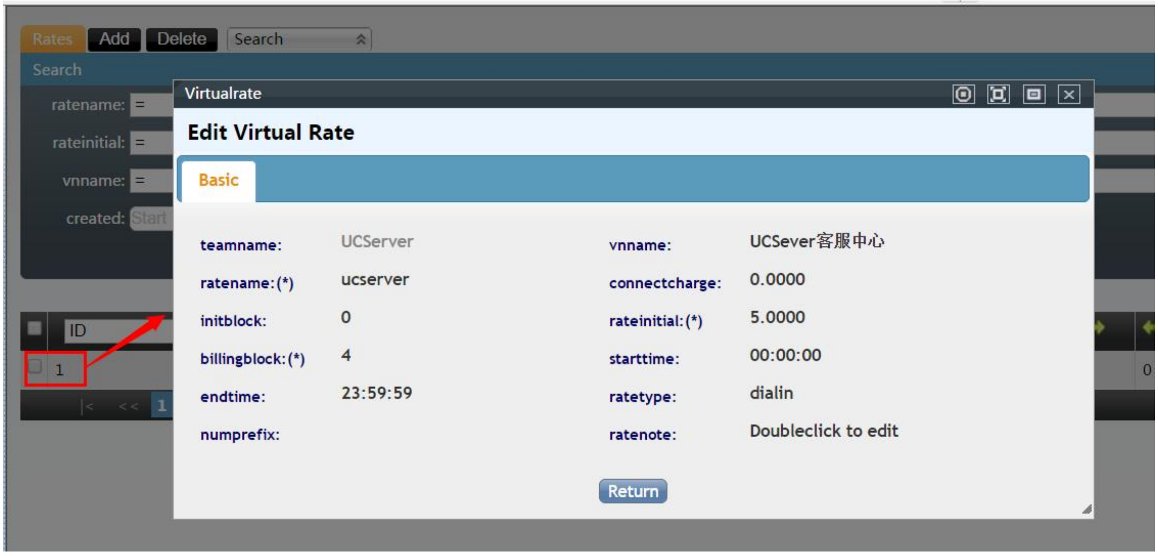
ratename: Rate name,is used to distinguish the different rate
rateinitial: The rate per minute
billingblock: How long to charge by the rate

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

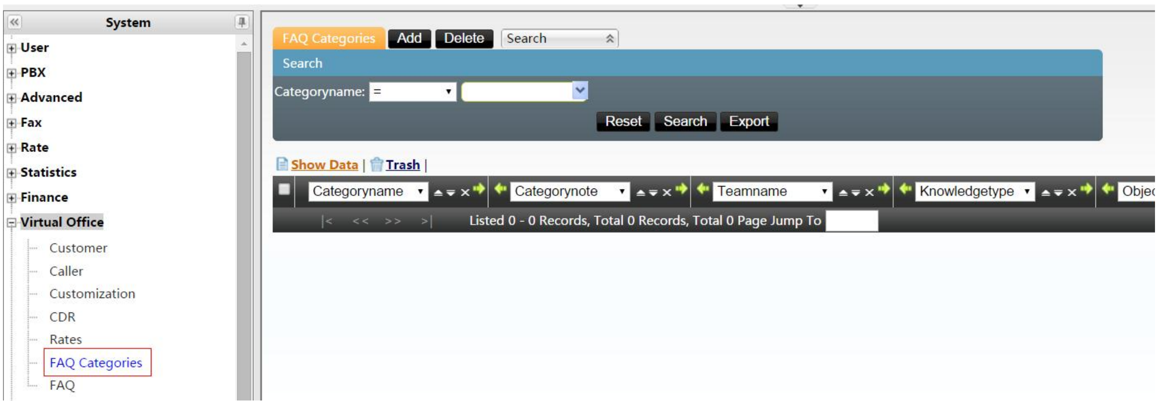
Edit

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



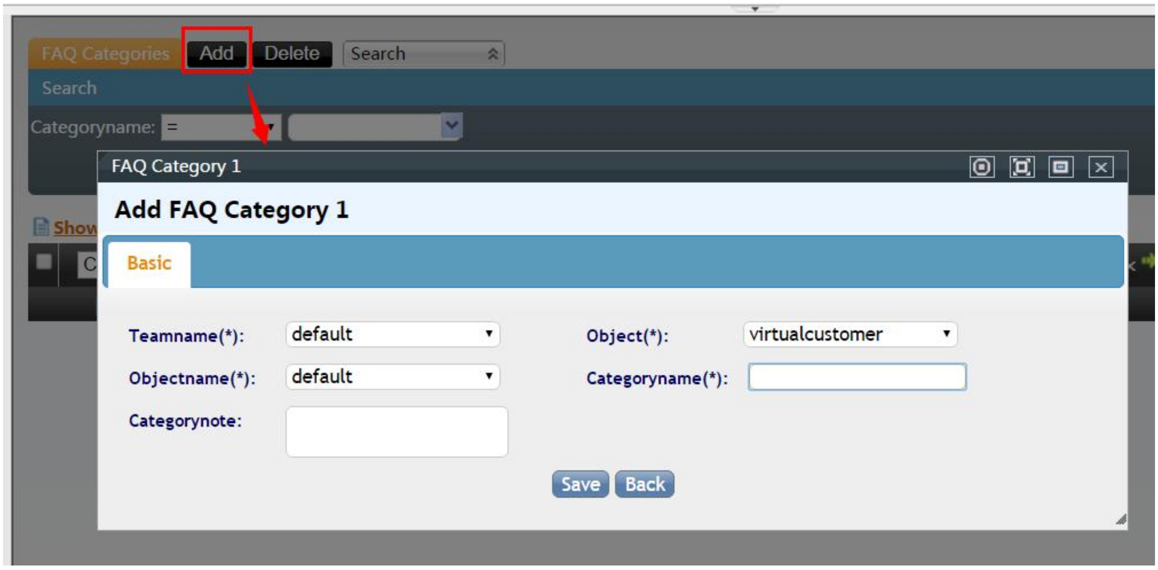
8.6 FAQ Categories

FAQ Category include FAQ Category 1 and FAQ Category 2 ,so it can division into details. On the leftmenu, Virtaul Office –> Knowledge,open the FAQ Category 1.



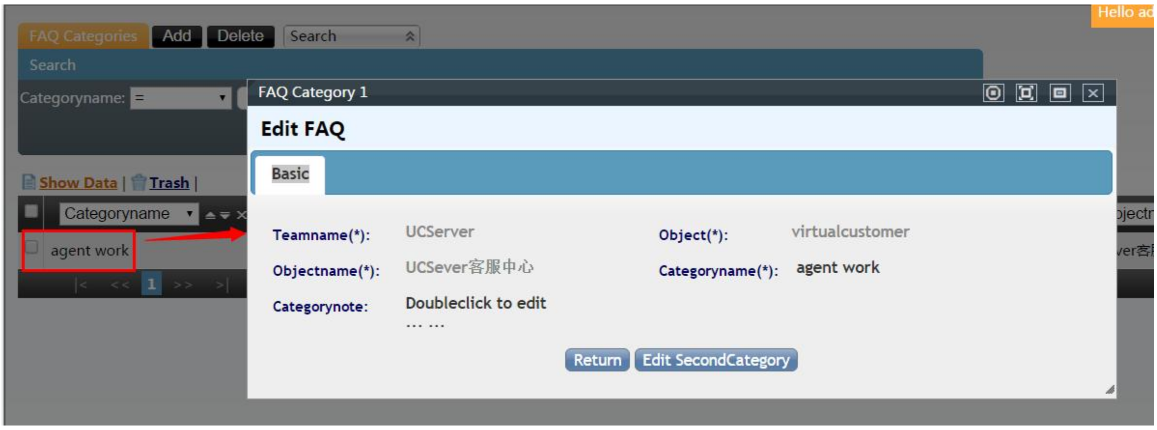
Add FAQ Category 1

Click [Add] button to open the add page



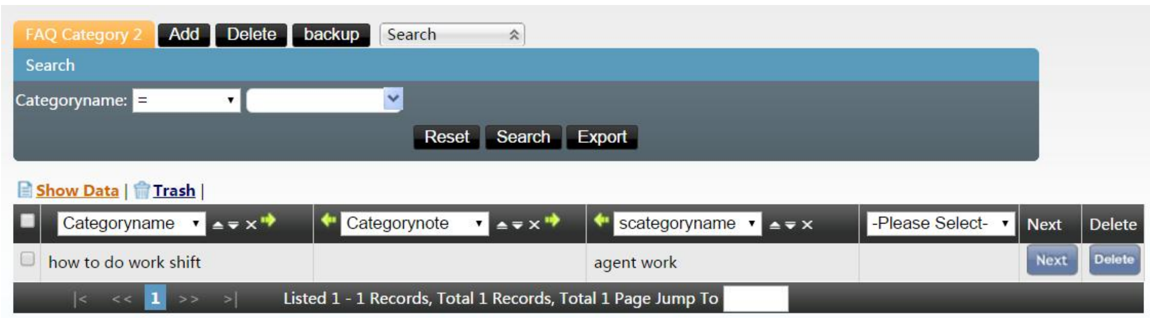
Fill relate message,then click [save] button to save the data.The saved data will be shown in the list.

Double click the data,can edit it.

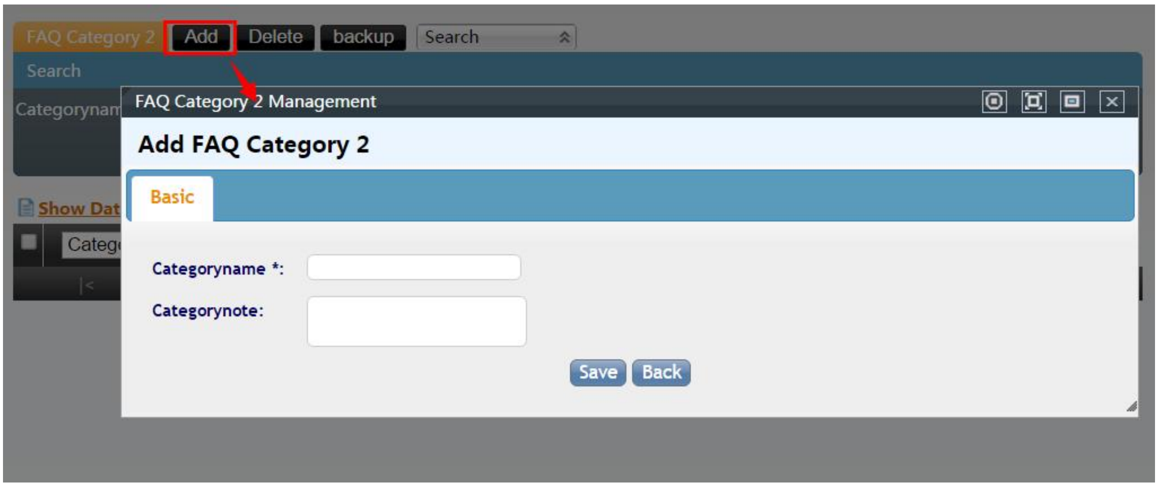


The cursor mouse out,will update the value automatically.

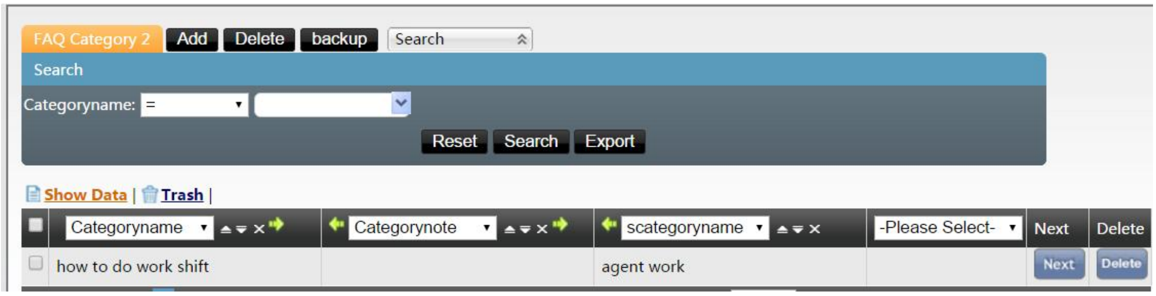
Click [EditSecondBtn] button or click [next] button in the page list to open `FAQ Category 2`'s page.



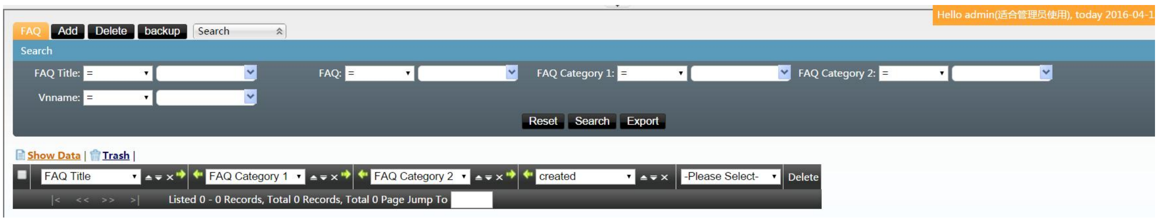
On the `FAQ Category 2`'s page,click [add] to add `FAQ Category 2`'s data.



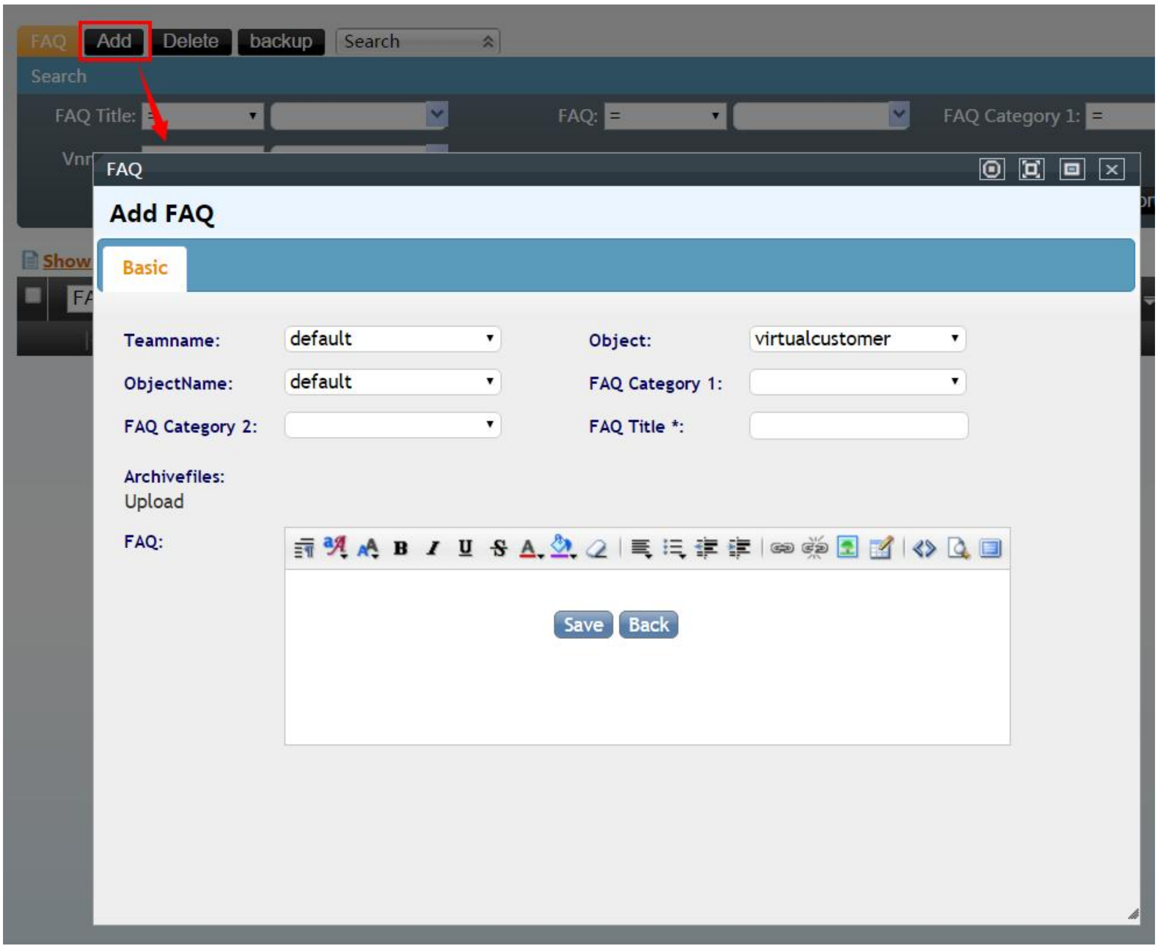
After fill the information,then click the [save] button to save it.The data will be shown in the page list.



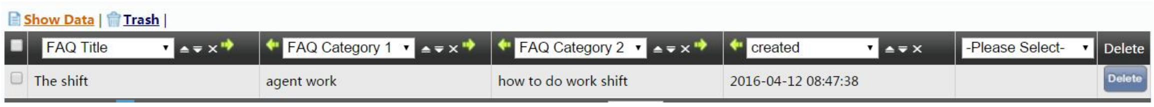
Click [next] button to open the FAQ page.



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.



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。

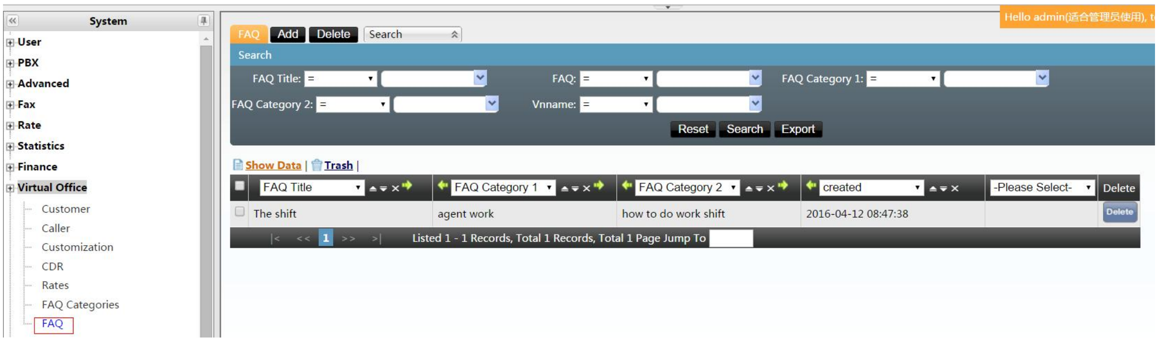
Just like sports is the `FAQ Category 1` and football is `FAQ Category 2` of `FAQ Category 1`.They have relationship.

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

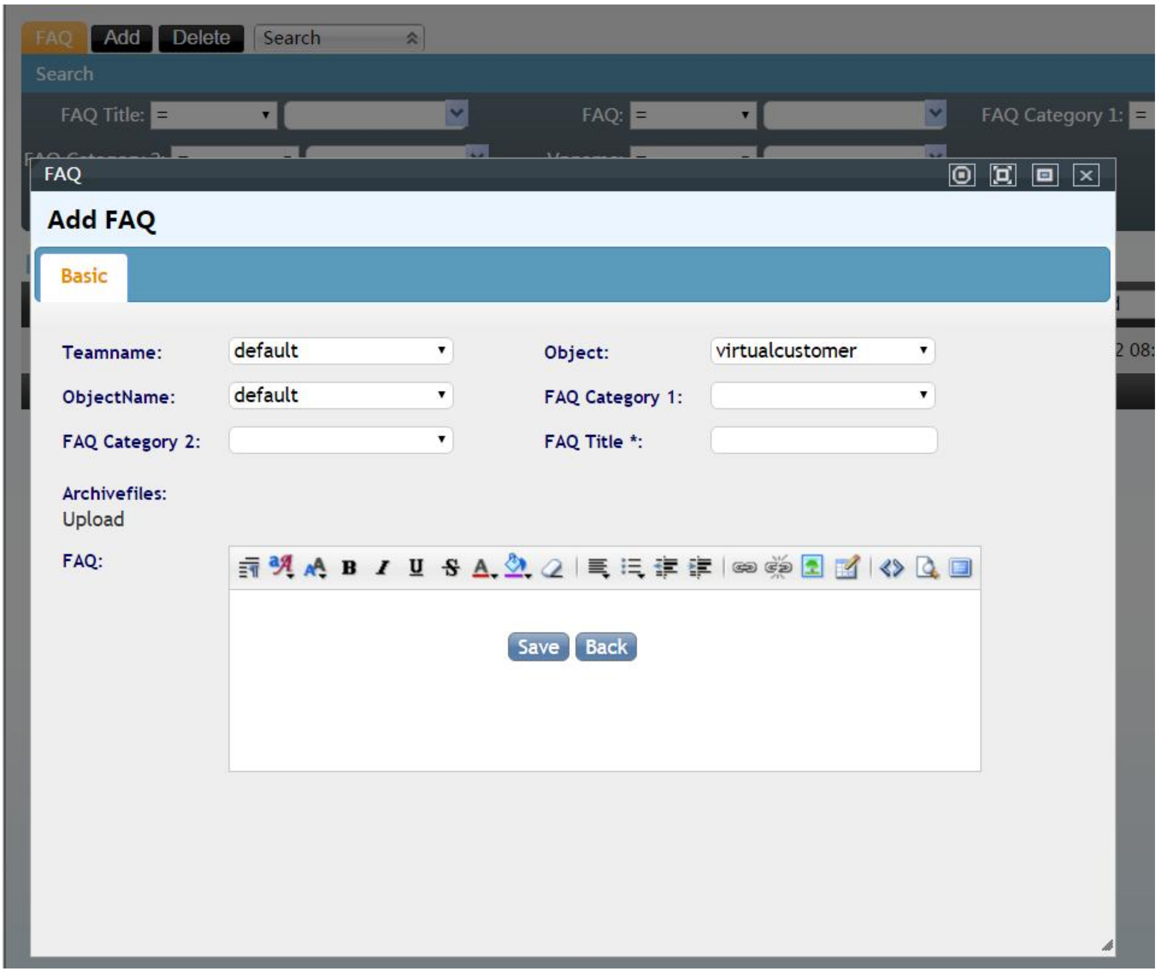
8.7 FAQ

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

On the leftmenu,Virtual Office –> FAQ Category 1, open the FAQ page



Click Add button to open the add page

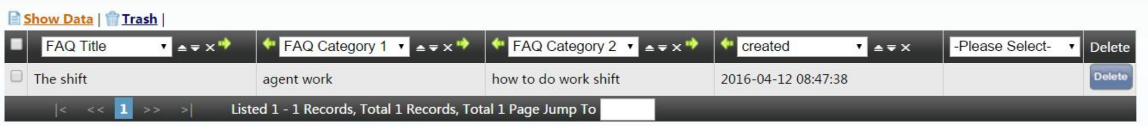


Teamname: which team need to use the FAQ.If choose `default`,all the customer can use the FAQ.
Objectname: which customer need to use the FAQ.If choose `default`,all the customer of the team can use the FAQ.
FAQ Category 1: The FAQ Category 1,choose one category,then the `FAQ Category 2` related will 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

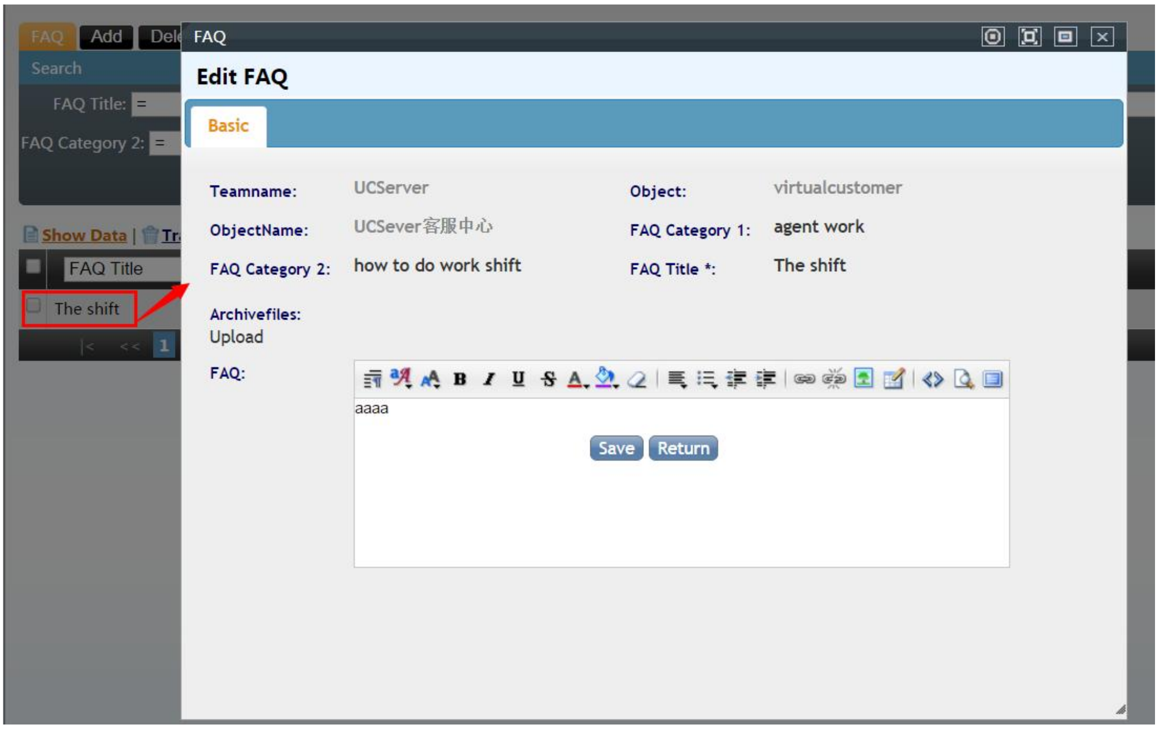
Archivefiles:support upload the file for FAQ.So the agent servers for the customer can download the file to read.

FAQ: FAQ content

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



Double click the data,can edit the data:

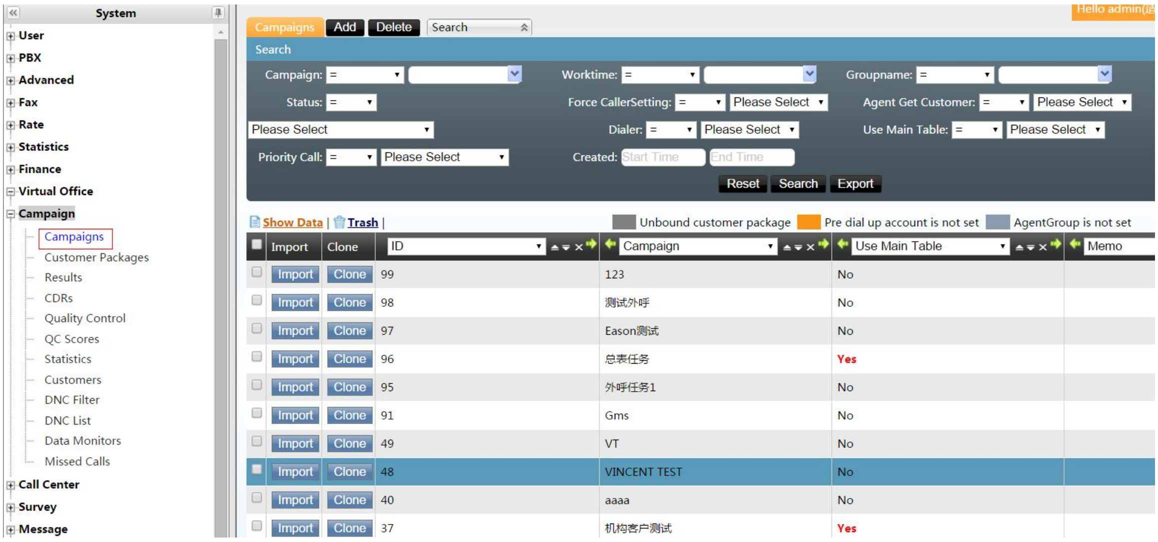


Double click the `FAQ Category 1` premeter,can edit it.Change the `FAQ Category 1` select,it will relate the `FAQ Category 2` category to show in the `FAQ Category 2` premeter's select.So if confirm it,you can click [Confirm] button to update the FAQ.

9 Campaign

9.1 Campaigns

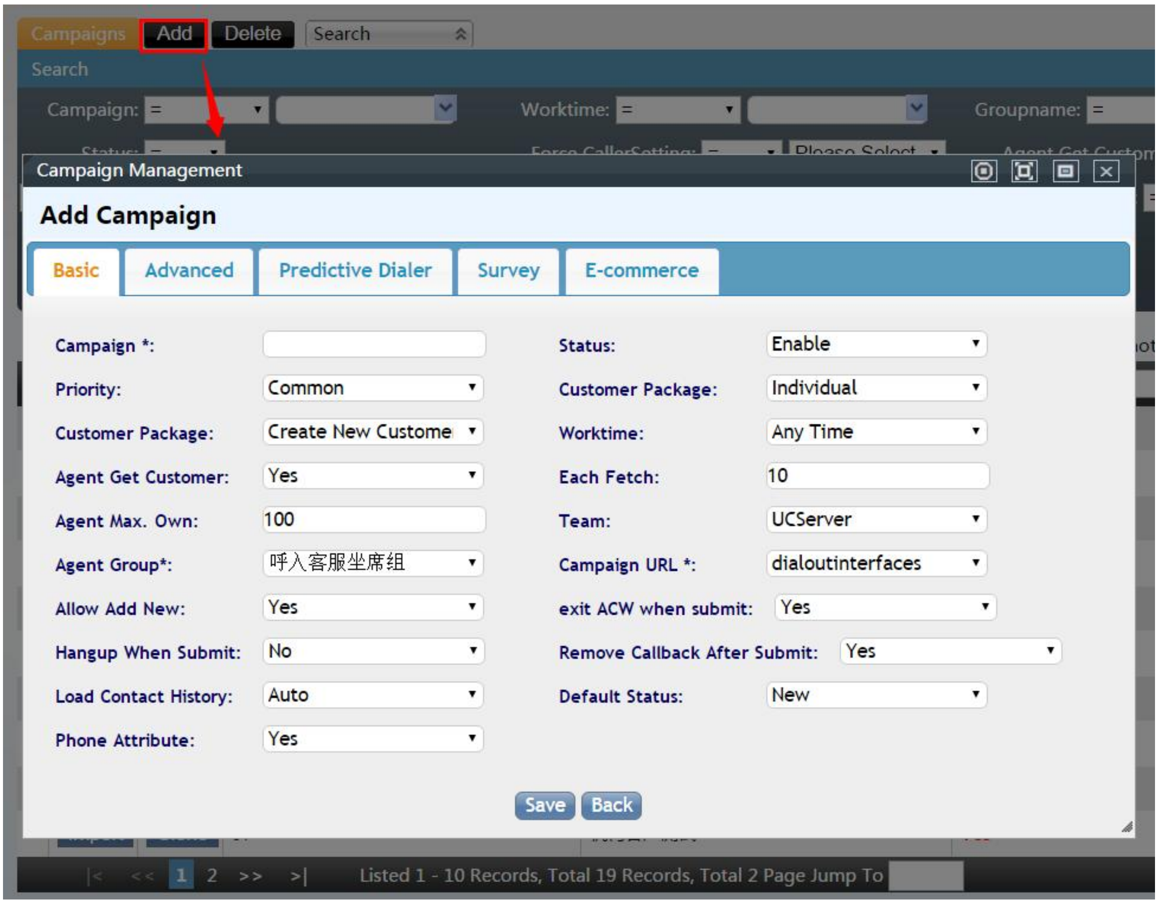
On the left menu, please go to[**Campaign**]–> [**Customer**] to open the page



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



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

Basic

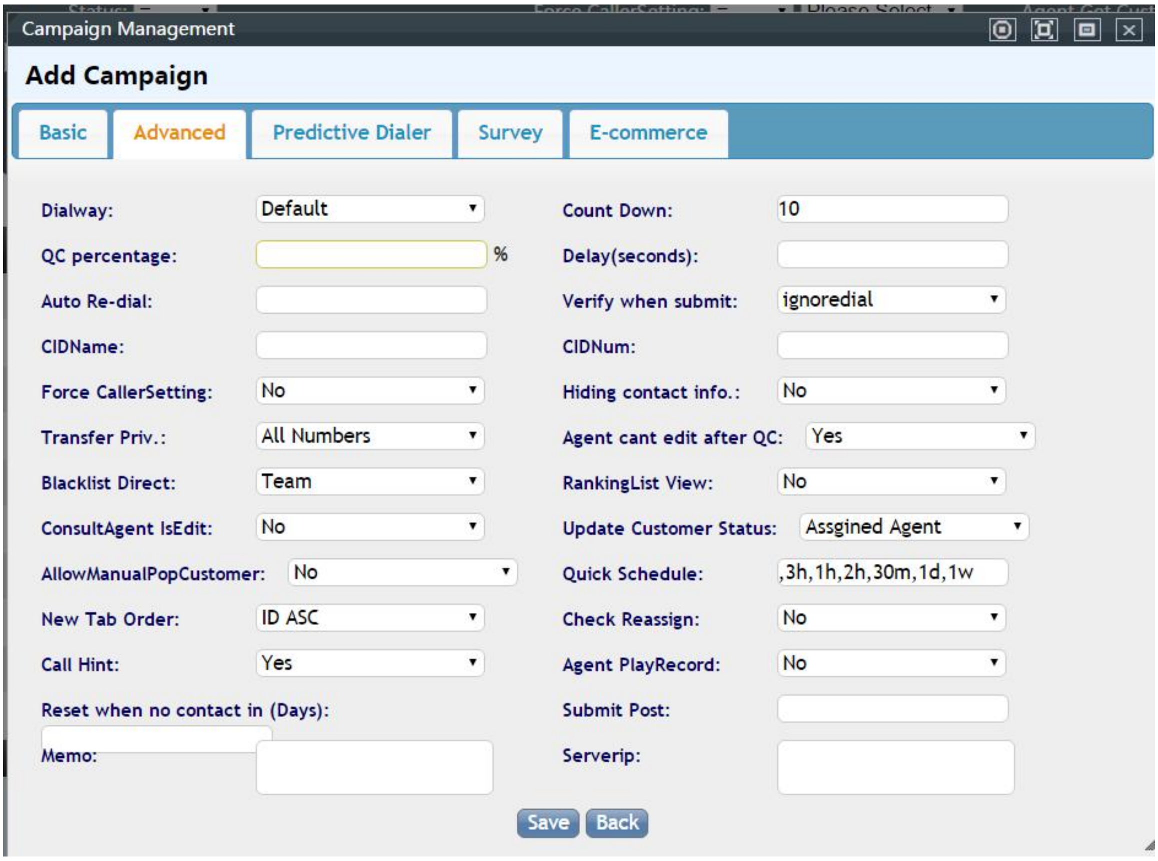
- **Campaign**：name this campaign.
- **Status**：
- **Enable**: This campaign is enabled to all users
- **Agent Campaign List Disabled**: Agent could not see this campaign in his campaign page
- **Disabled**: User could not see this campaign
- **Priority**：The display order in the agent campaign page, 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

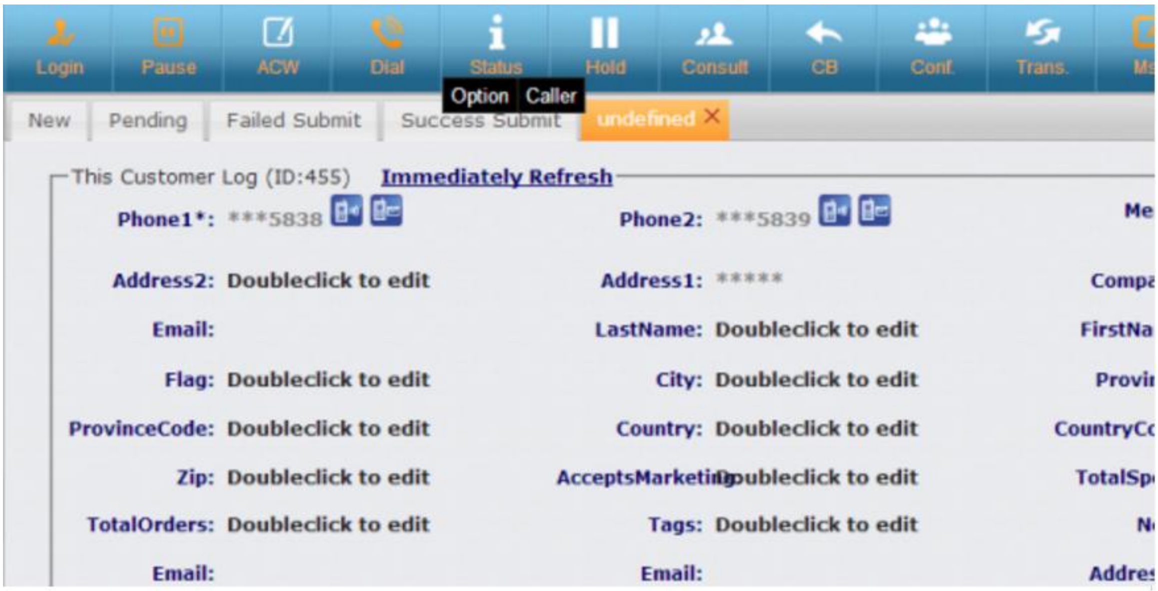


- **Dial Way**: Select how to dial in this campaign
- Default: Agent need to open the customer and click the dial icon to dial
- Preview: When agent open a customer, system will dial automatically
- Auto: Agent click "Start Work" button, system will dial customers one by one, when agent finish one customer, system will start count down, then open and dial another customer, for more information about auto dialing, please readauto_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

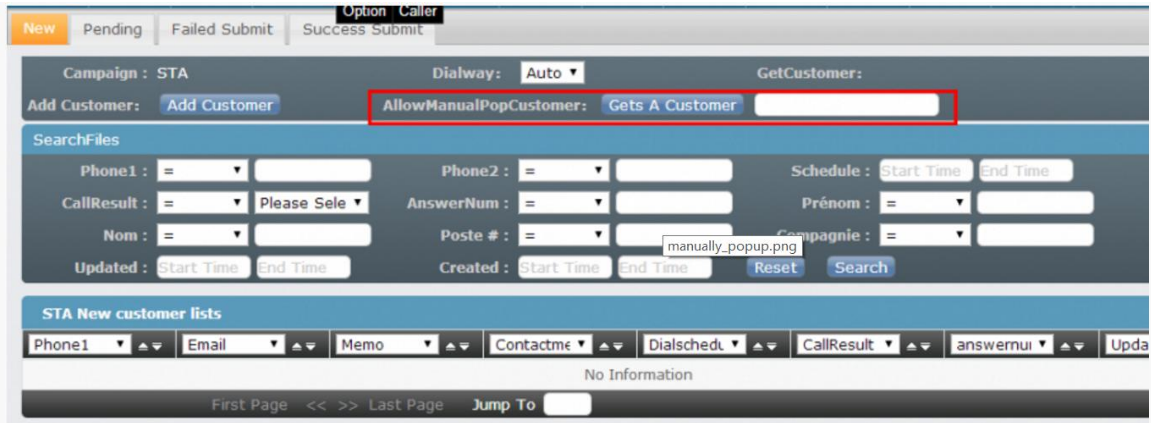
- **Survey Fullscreen**: When customer information popup, if the survey(if has) will become full screen
- **Hiding contact info.**: When enabled, agent could not read customer phone number, fax number, email and address



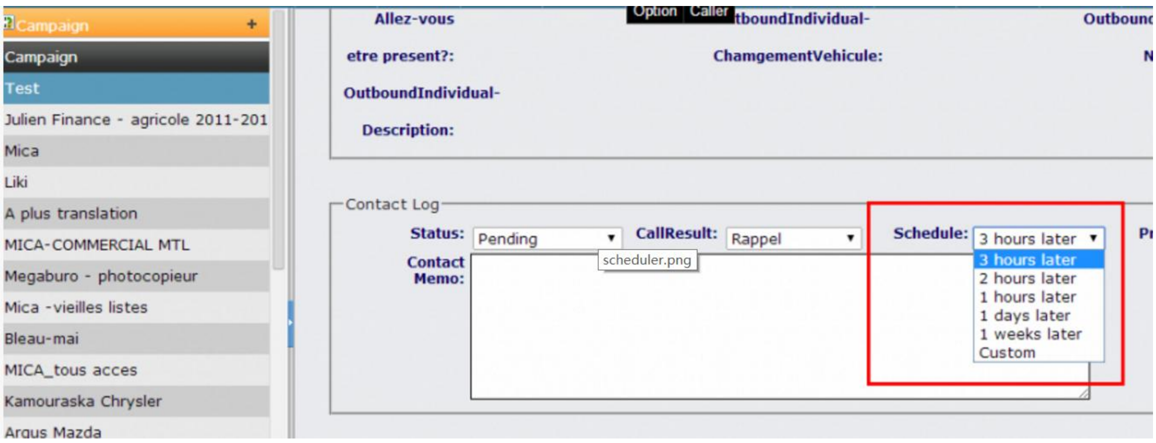
- **Transfer Priv.**: If agent is able to transfer the call to any number
- **Agent cant edit after QC**: If agent is able to edit a customer which has been reviewed in QC page
- **Load Contact History**: When customer popup, if it loads history records
- Manually: Agent needs to click the link to load 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



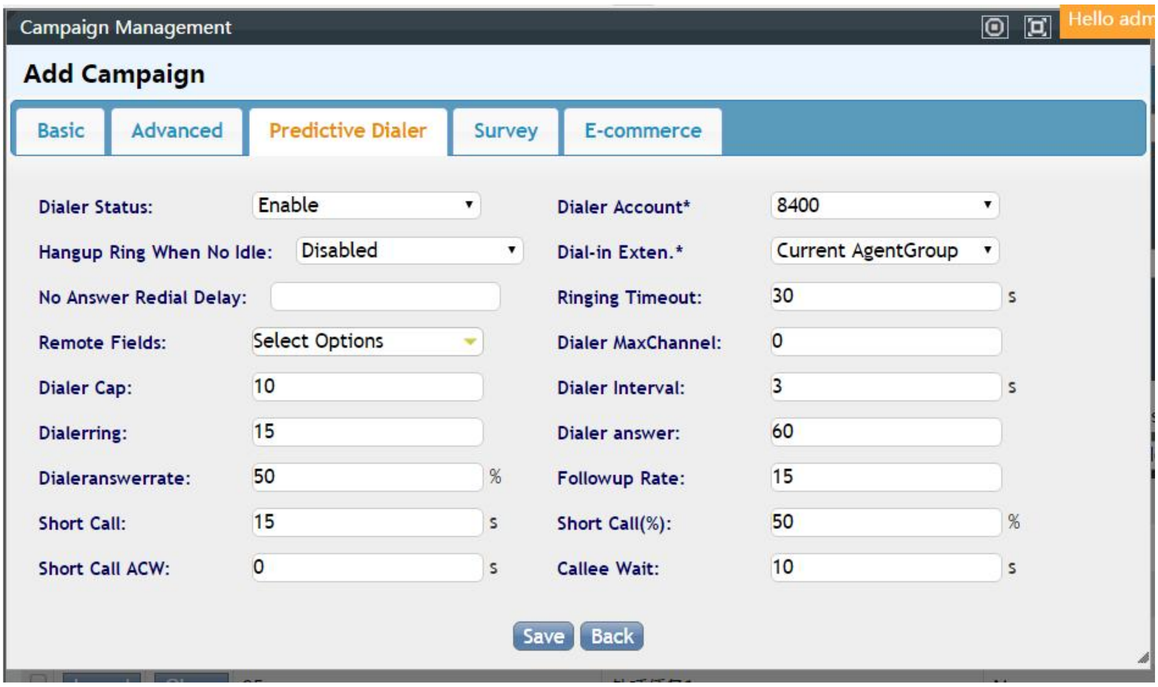
- **Quick Schedule:** : h = hour, d = day, w = week, for 3h,1h,2h,1d,1w you will have



- **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 campaingn.
- **Server IP**: If you want to use API to this campaign from external system, you need put the source ip

Predictive Dialer



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

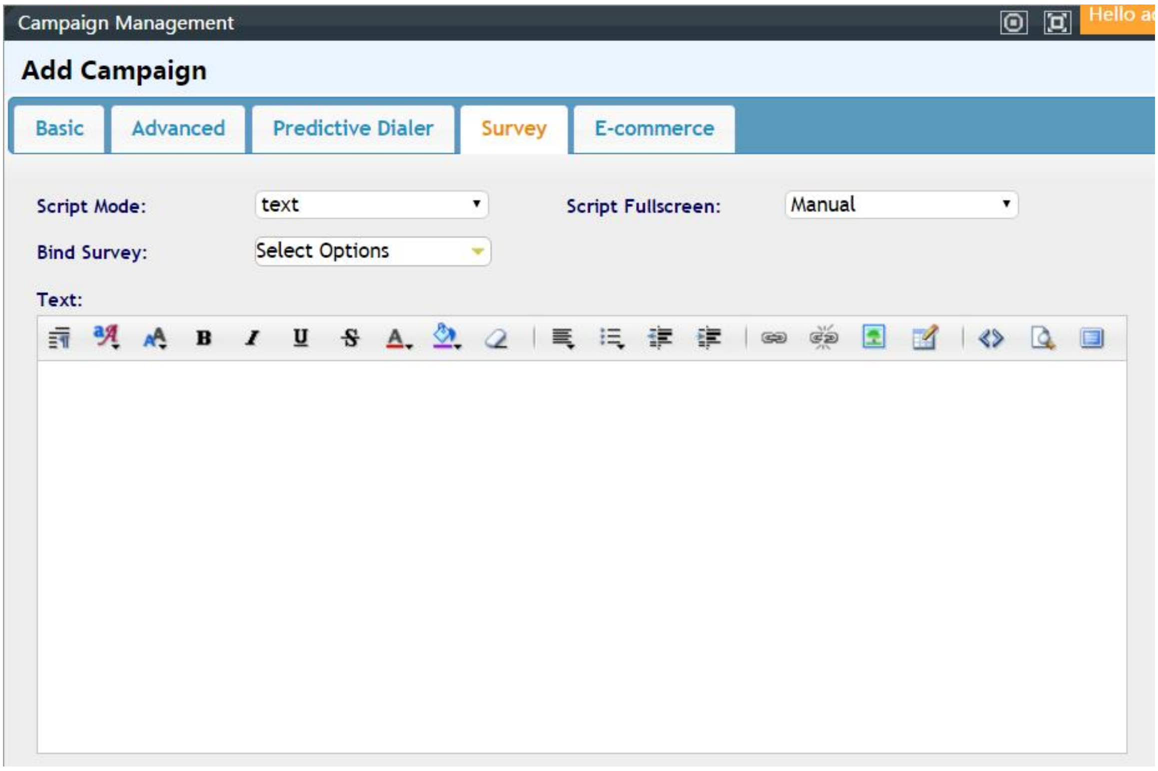
- **Dialer Status**: if you want to enable predictive dialer for this campaign

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 campagin
- IVR: transfer to pre-defined system IVR
- **No Answer Redial Delay**: Total redial delay time for no answered calls

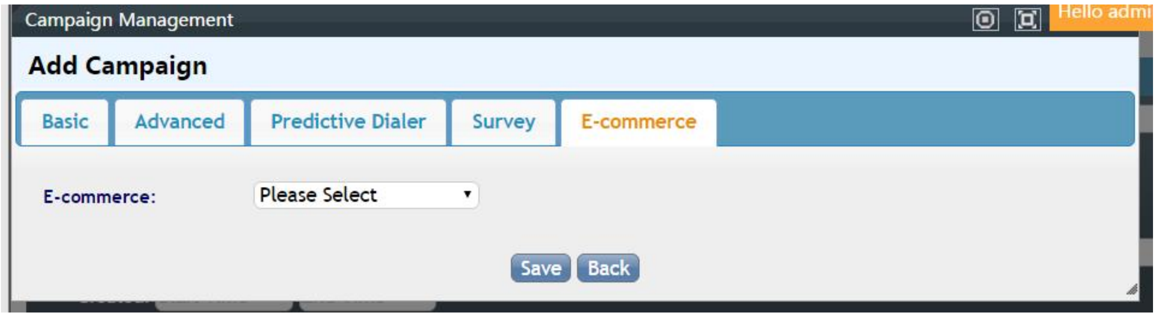
- **Ringing Timeout**: Max. ringing time in PD
- **Remote Fields**:
- **Dialer MaxChannel**: Max. calls in this PD
- **Dialer Cap**: Max. number PD dialed each time
- **Dialer Interval**: Dialing interval in PD
- **Dialerring**: Ringing time PD assumed
- **Dialer answer**: Talking time PD assumed
- **Dialeranswerrate**: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

Survey



Script Mode：Text or survey;
Script Fullscreen：Fullscreen manually or answerauto;动或者客户接通后自动全屏。
Bind Survey：Select a survey;
Text：Input the text input box;

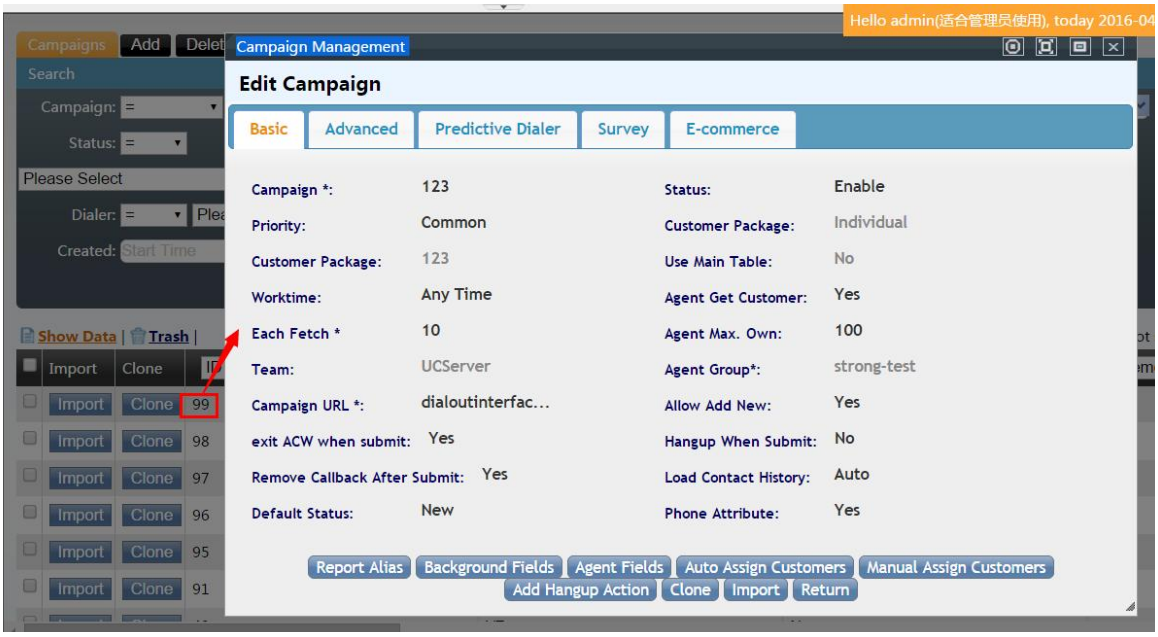
E-commerce



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.

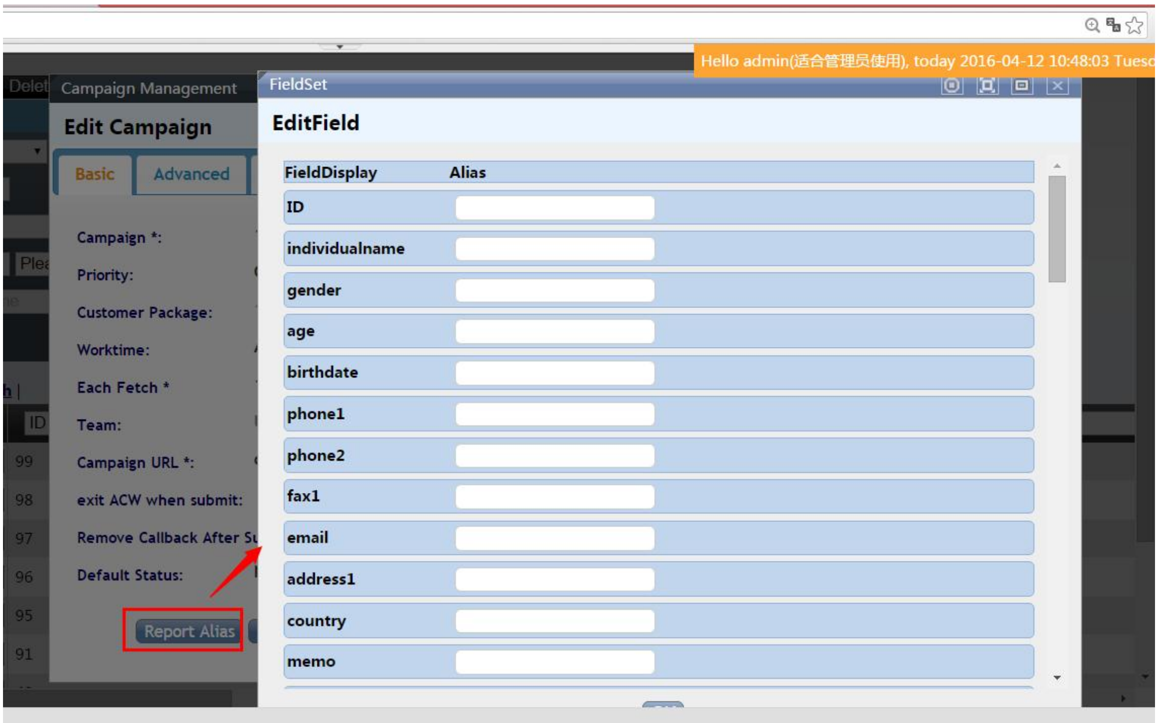
Background Fields and Agent Fields, are to control which fields are to be displayed on the background page or agent working page, and which are editable.

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,



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.

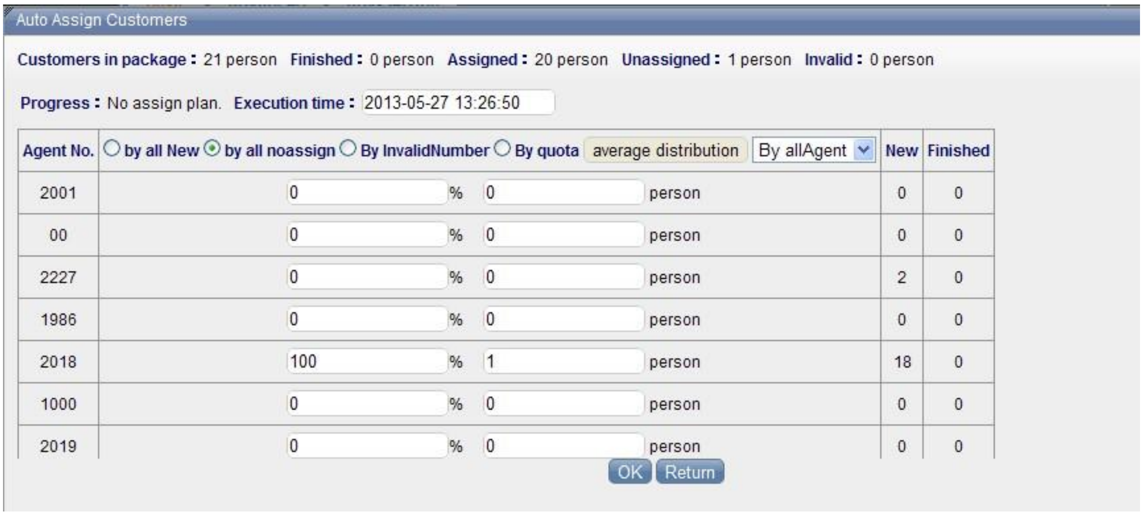
- In the window, you can drag a field to control the display sequence.

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



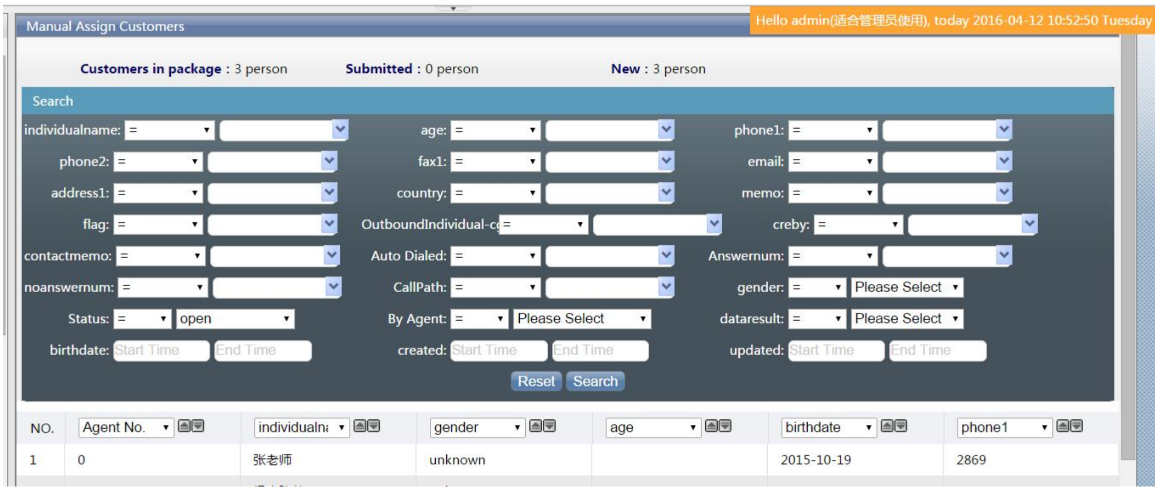
- For auto assign, you need to set an execution time, in "Process" you can see the current assign job status

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

Manually Assign

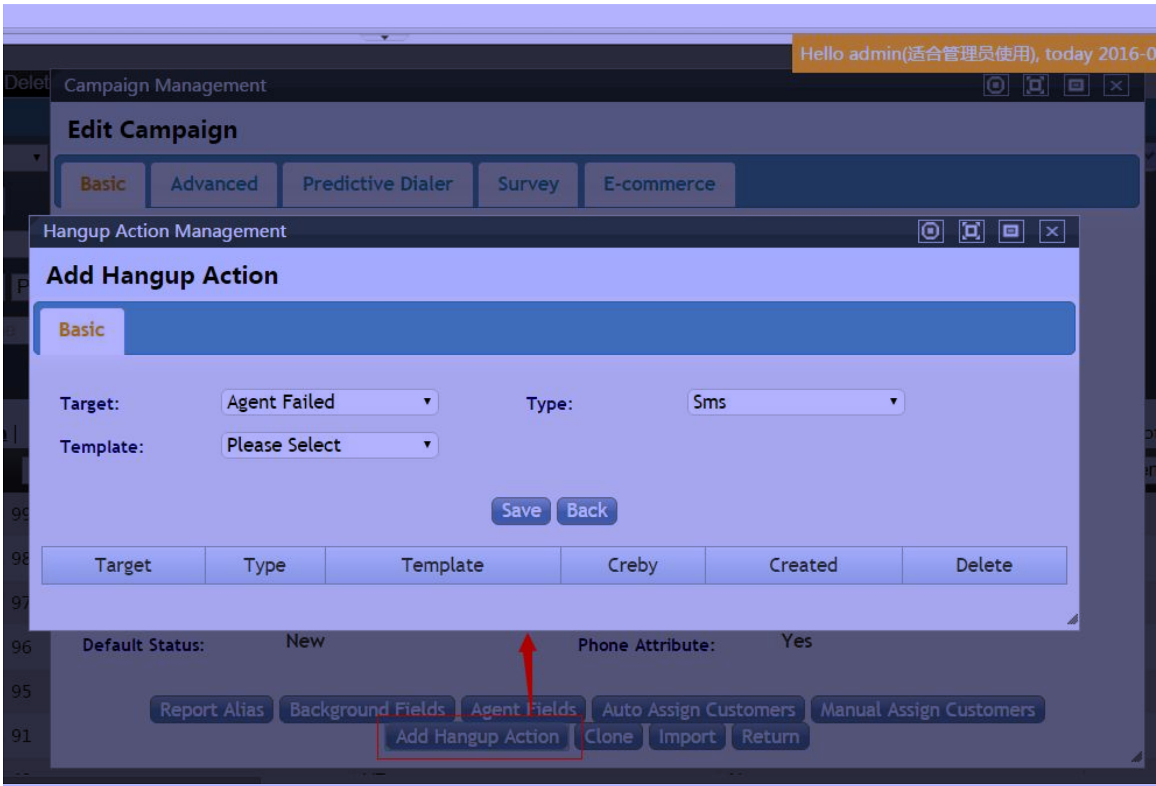
- Click **Manually Assign Customers** button, it will popup a new window so you can assign customers to agents manually.

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



- 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;

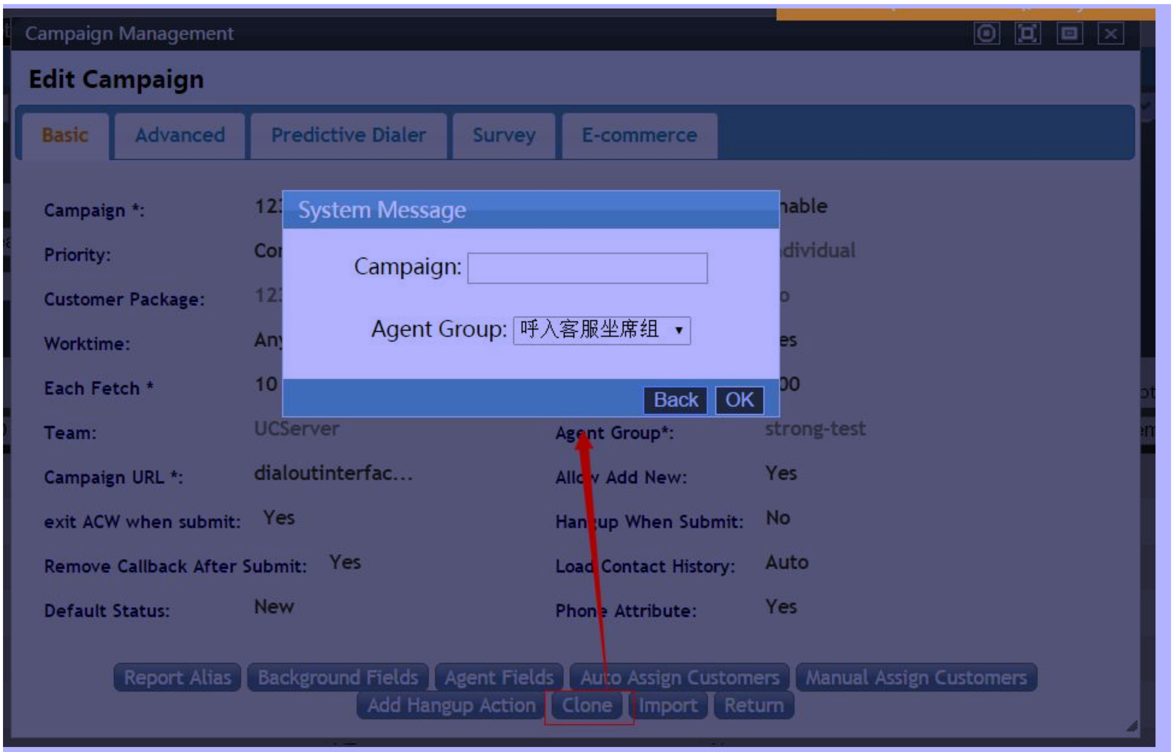
Type: short message or Email;

Template: Select a template;

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

Clone

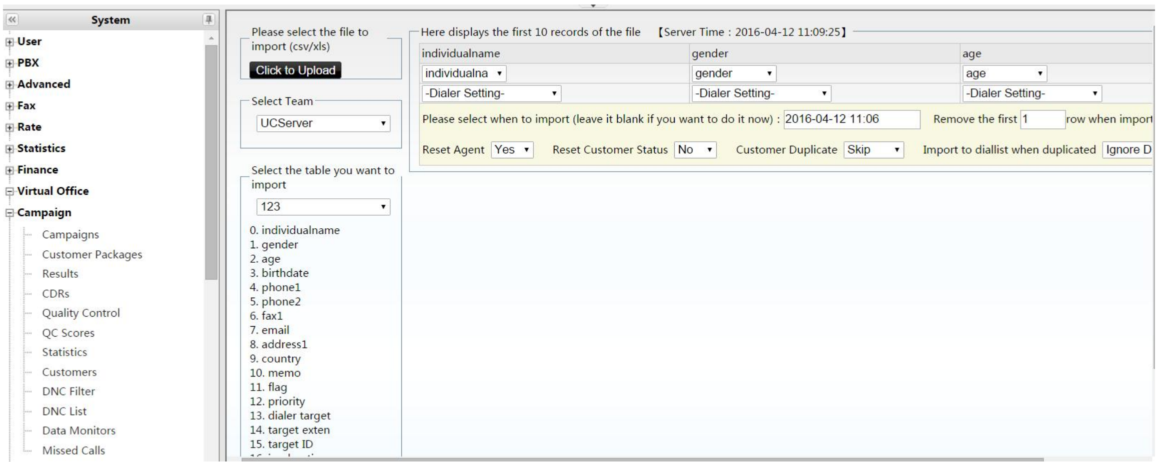
Click Clone, a system message will popup:



After the settings, it will clone a new compaign.

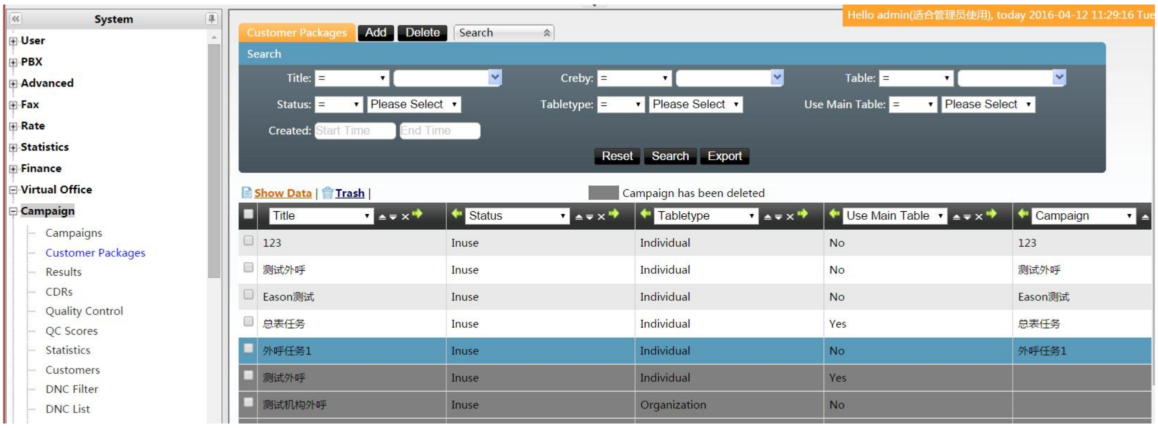
Import

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

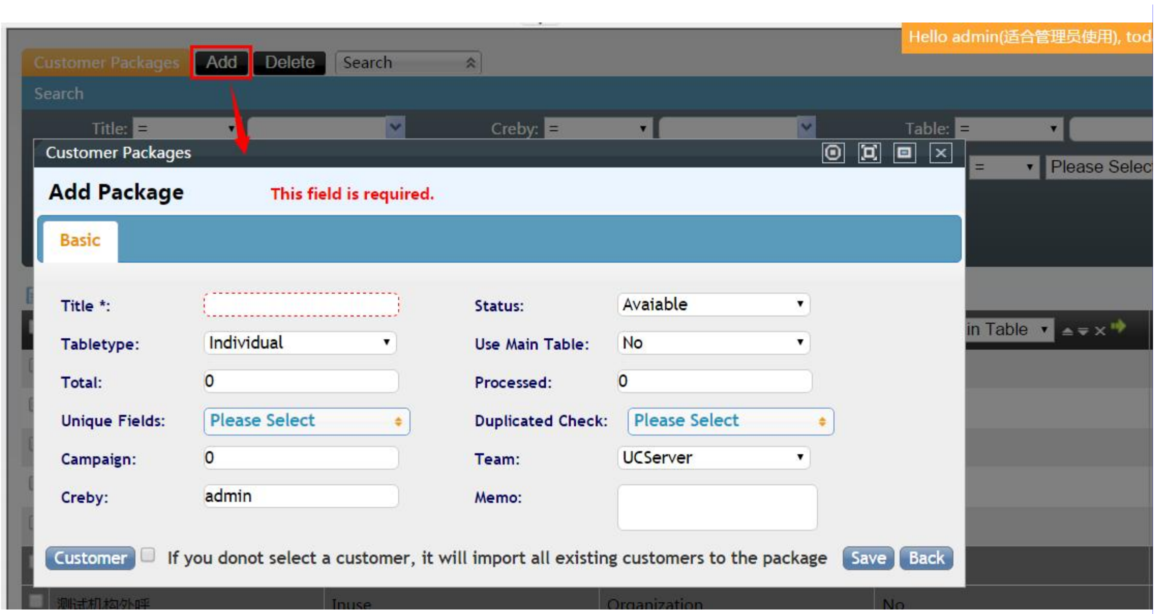


Module Function: Customer package is a customer contact info list of an enterprise or individual.This customer list is packed with its rules and requirement ,then apply to a campaign.Each campaingn will correspond to a customer package.When create a package, system will automatically establish a separate data sheet, name as individual customers table or corporate customers table.In this way,it is easy 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,delate and import(csv or xls) the customer info by searched result. This module can be added customer info repeately ,deleted or exported customer data.

Add



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

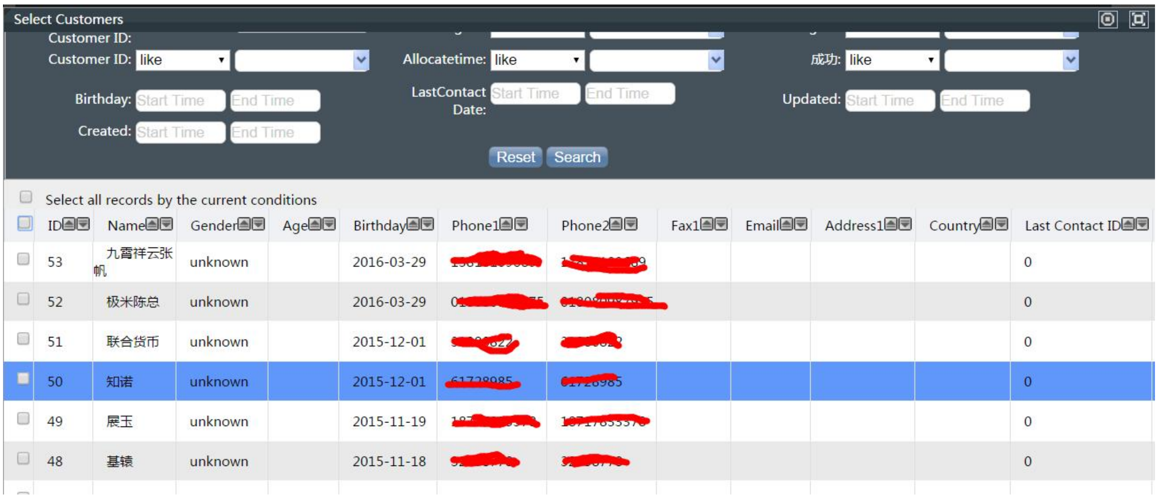
Tabletype: Individual or organization,it links to different table type.

Unique Fields: Set a field or several fields as unique, to prevent duplication when import data 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.

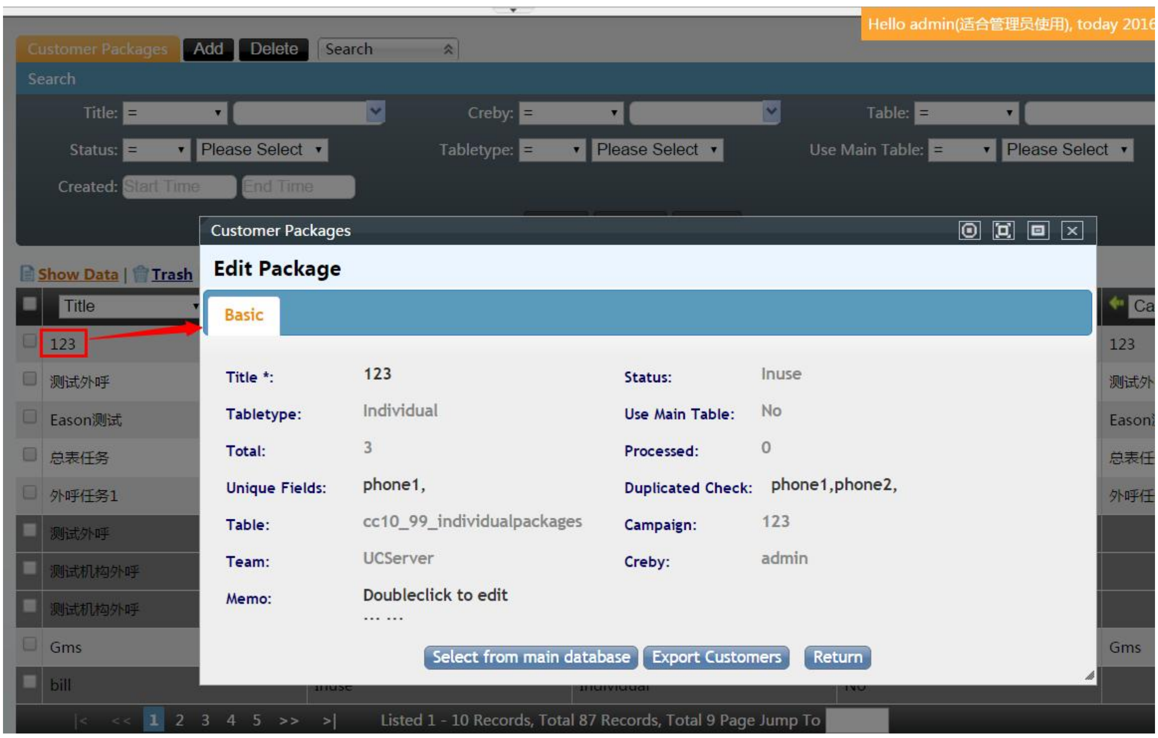
Team： To which team this customer package belongs to.Only this team can select this customer package in campaign.

Click【Customer】button to import customer info to this package from main table.(If you donot select a customer, it will import all existing customers to the package).



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

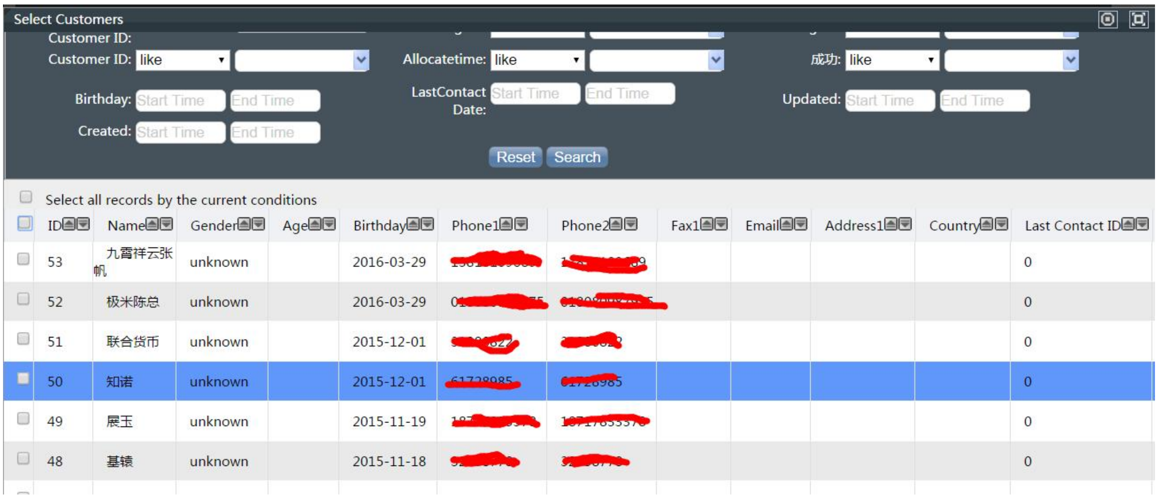
Edit:



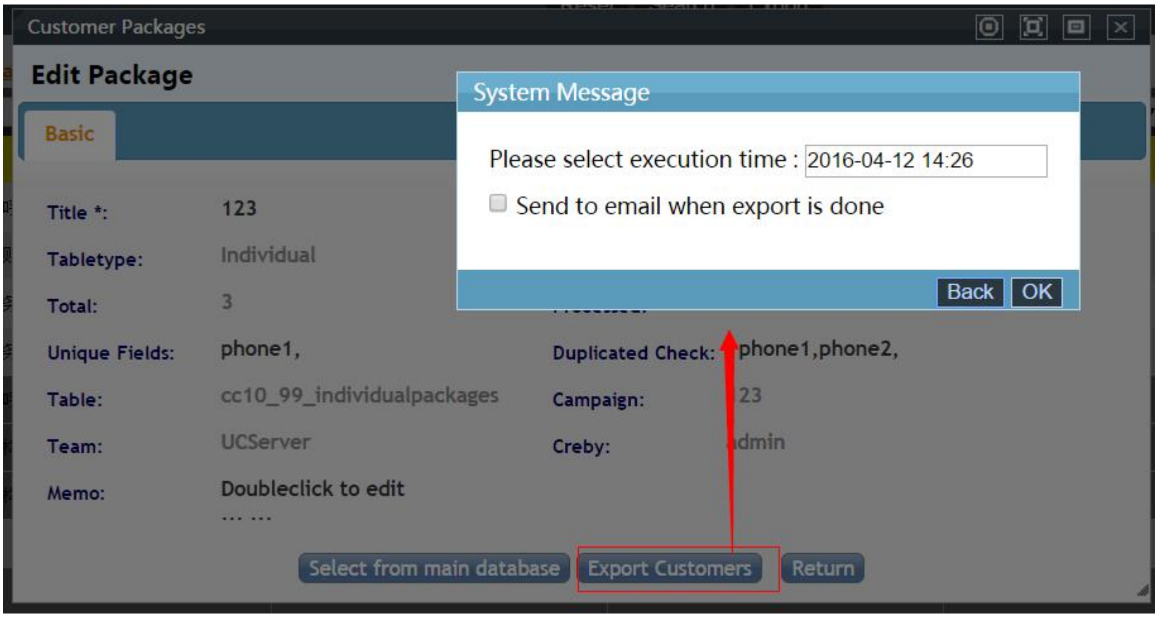
The gray field is can not be edited, only black field is editable.

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:

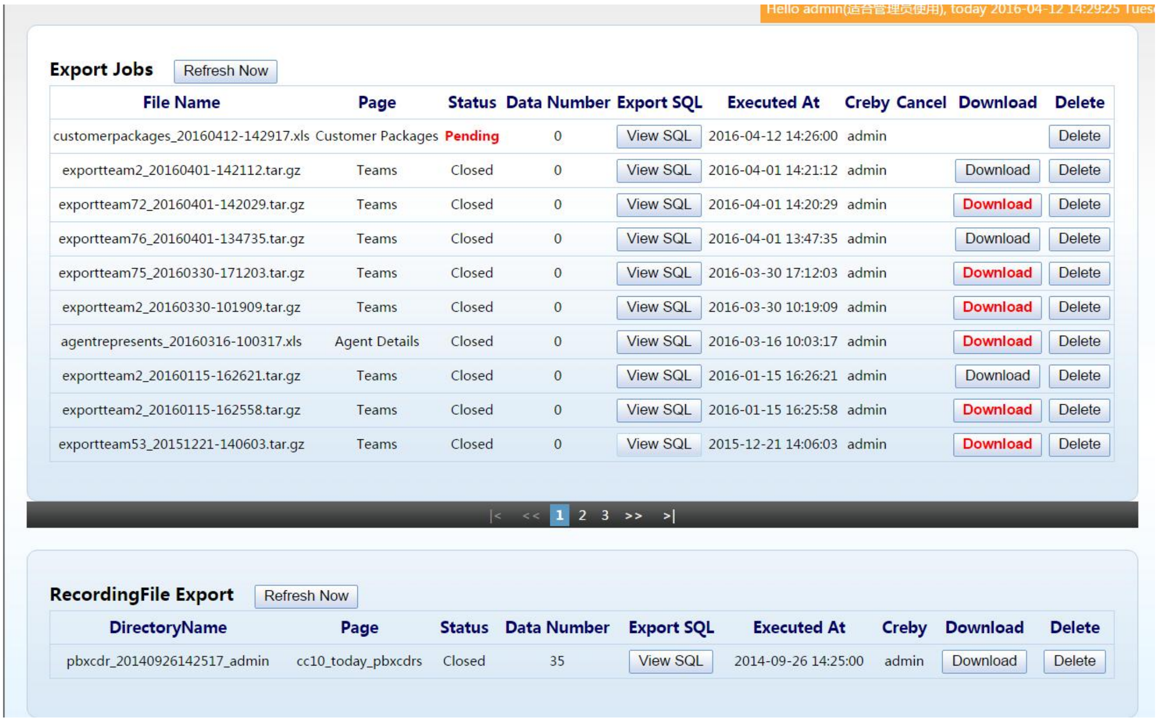


Export: To export customer info from customer package.

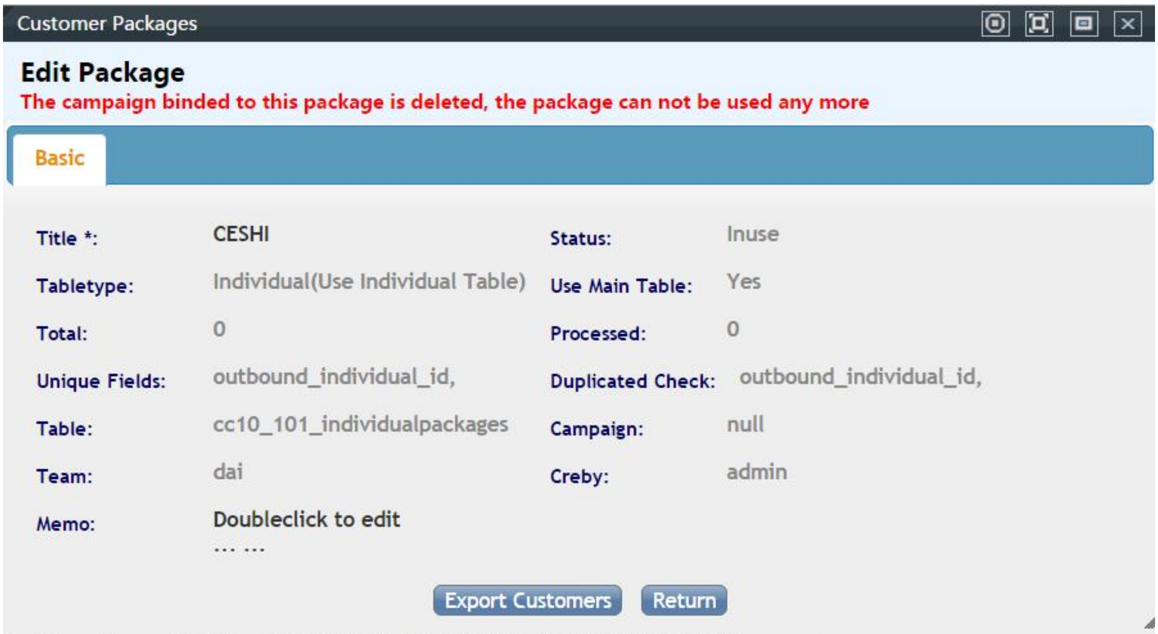


Click OK, then this package will be exported.

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



Double click it to edit.

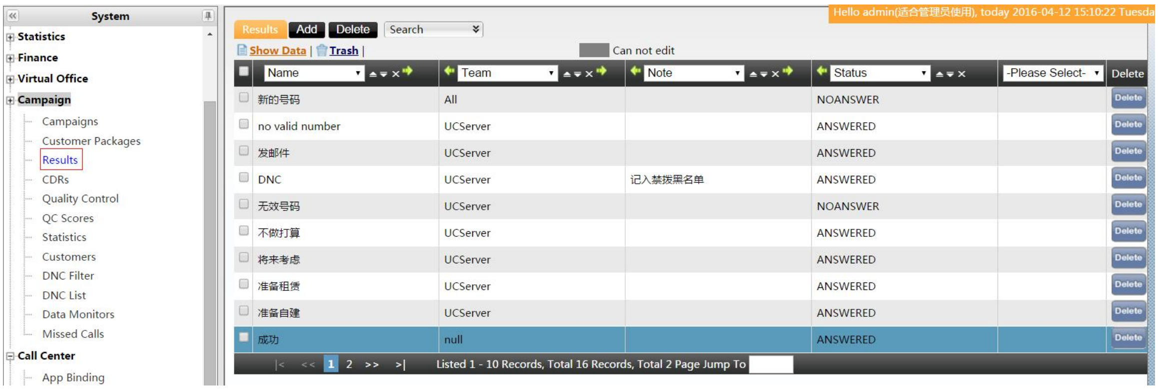


9.3 Result

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).

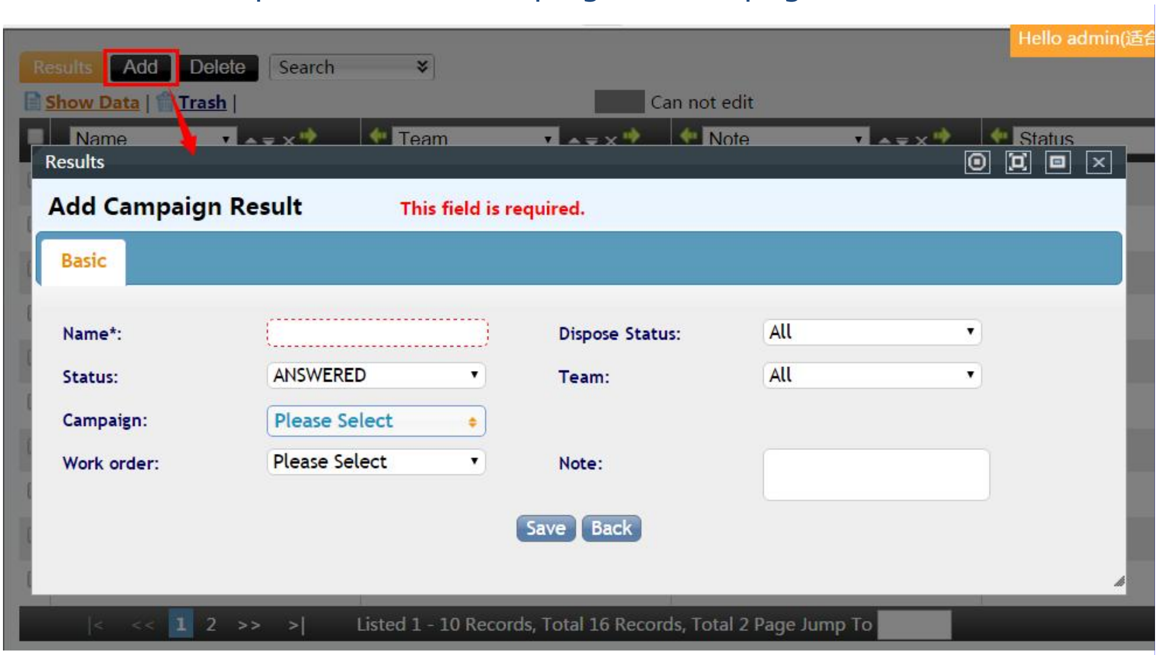
In the Campaingn Statistics, it will list all the calling result.



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.



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

Dispose Status：Select a status,(All,New,Pending,Success Submit,Failed Submit).Only whenagent choose 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 whh team this result will show.

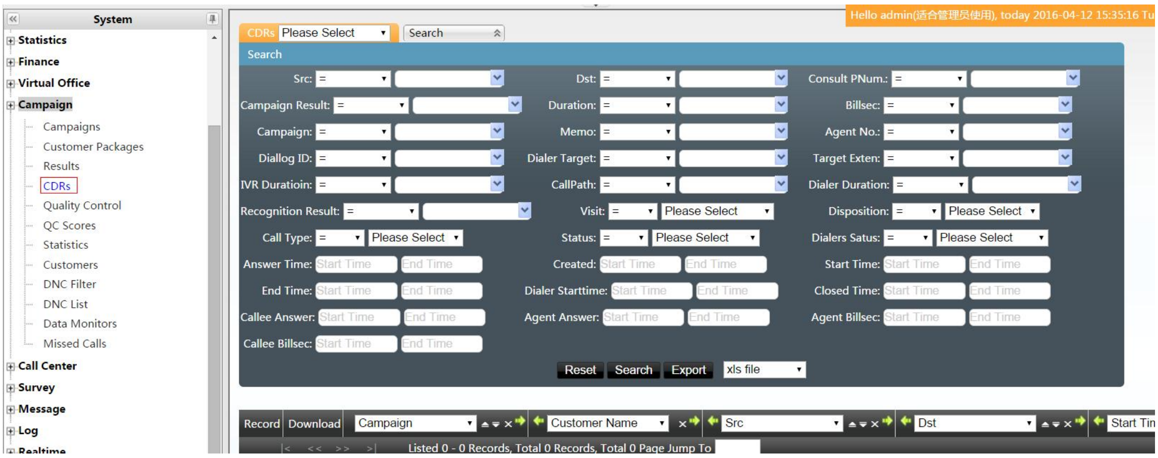
Campaign：If set a campaign, this result will only show under this campaign.

Work Order: Please select a work order.

Note：Give a note to this result.

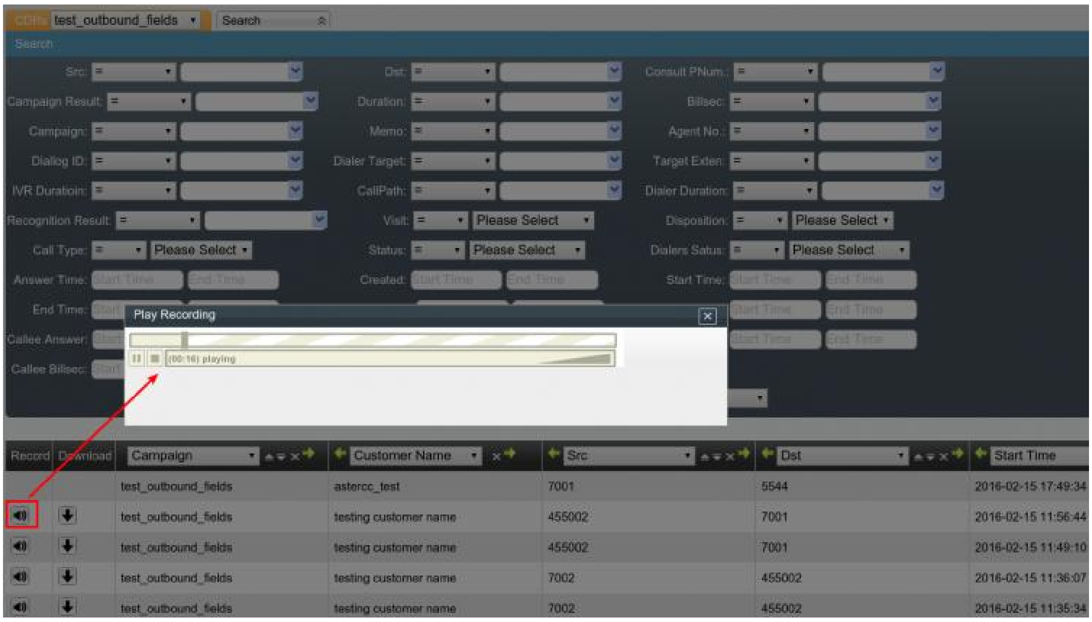
9.4 CDRs

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

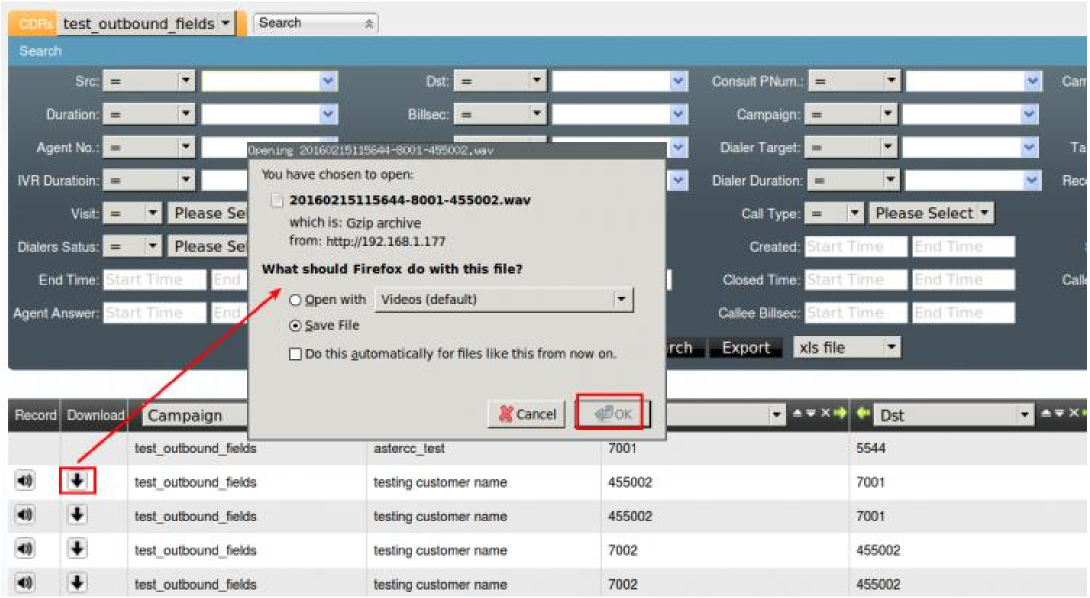


You can check the CDRs(eg:Src，Dst，Start Time(ringing)，Answer Time(answered)，End Time，Duration(End Time-Start Time)，Billsec(End Time-Answer Time)，Agent NO.，Disposition(Answered or not)，Record Mark)。

Click **Play Record** button，you can listen this CDRs；

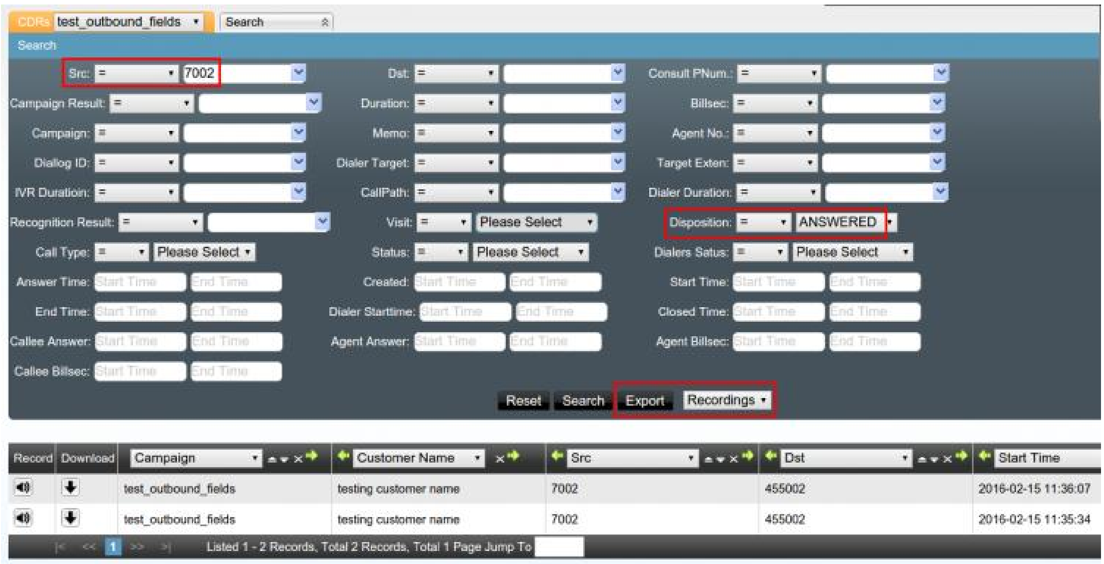


Click **Download** button，you can download the record file of CDRs；

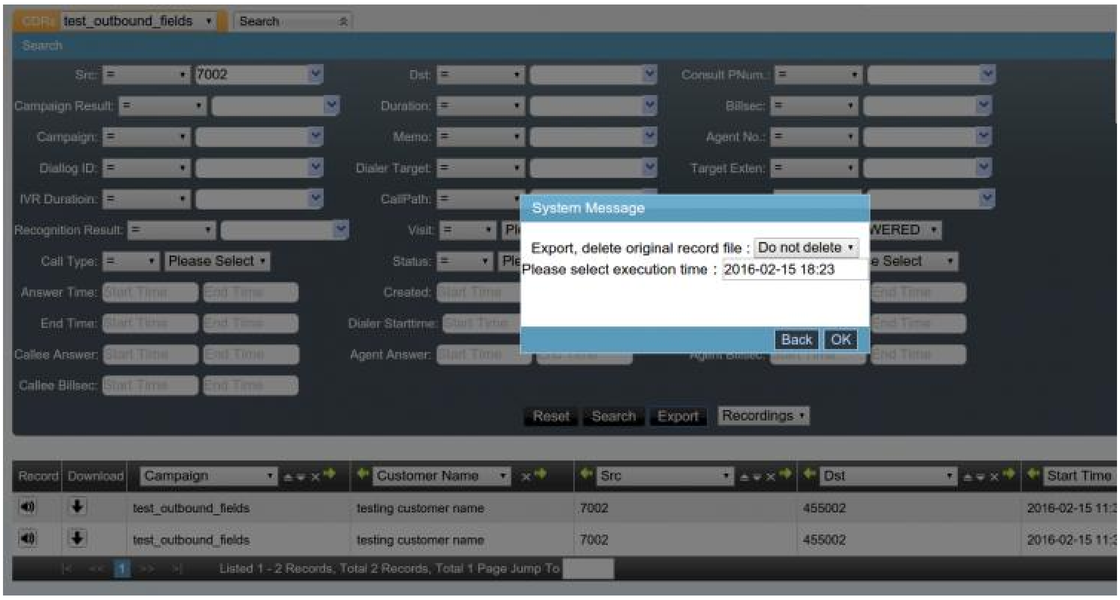


How to Bulk Export Recording

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.



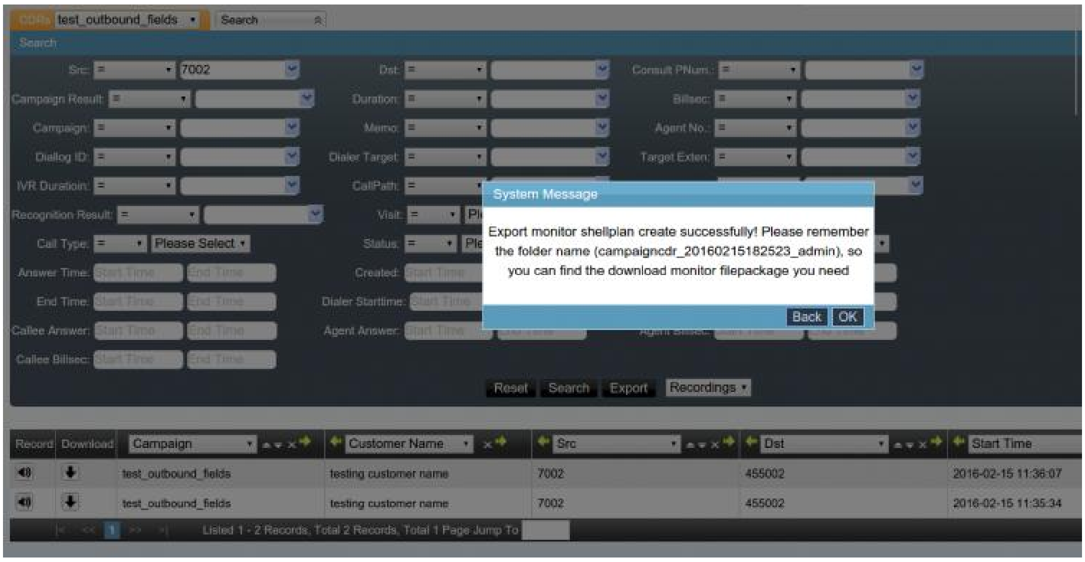
After clicking [Export] button, the system settings of original recording will popup.



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.

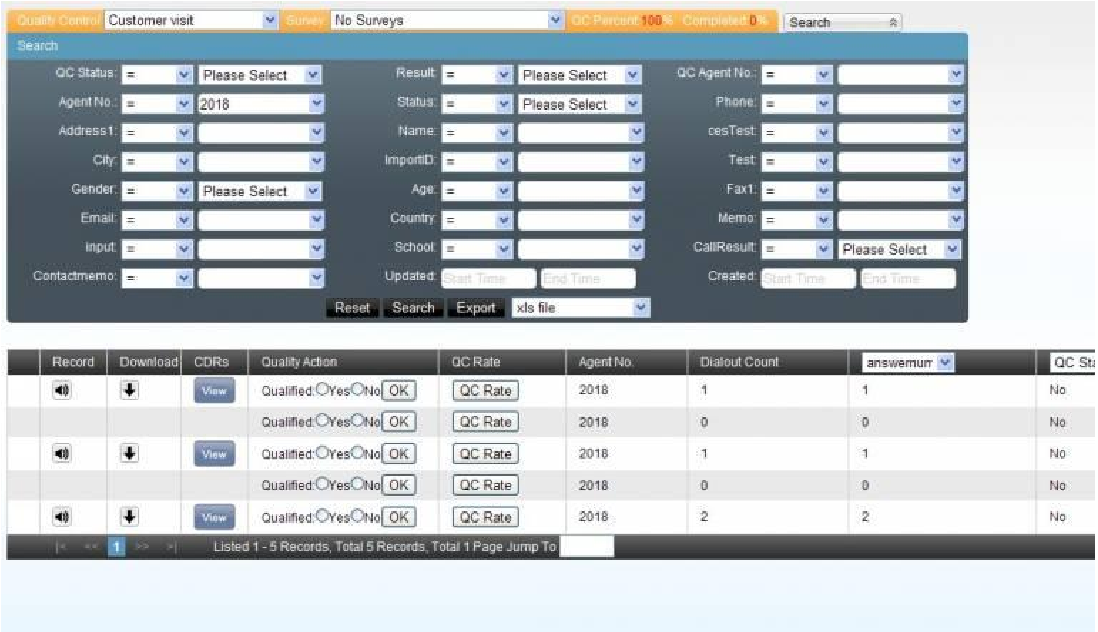
2、You also use ftp tools, enter the /var/www/html/astercc/data/monitor_download directory, you can find the recording file named suffix with "tar.gz".

Fields Introduction

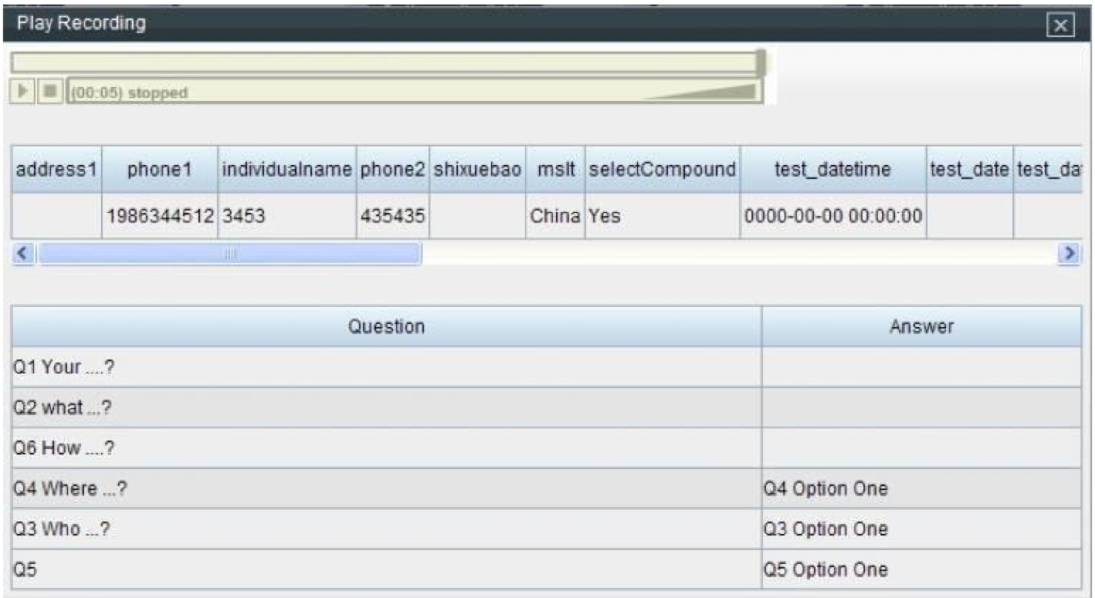
Campaign:The calls from which campaigns.
Customer Name:The name of customer in customer information.
Src:The phone number of caller of this call.
Dst:The phone number of callee of this call.
Diallog ID:It is used to identity a session，it is unique in one system.
Created:It record the creation time of 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

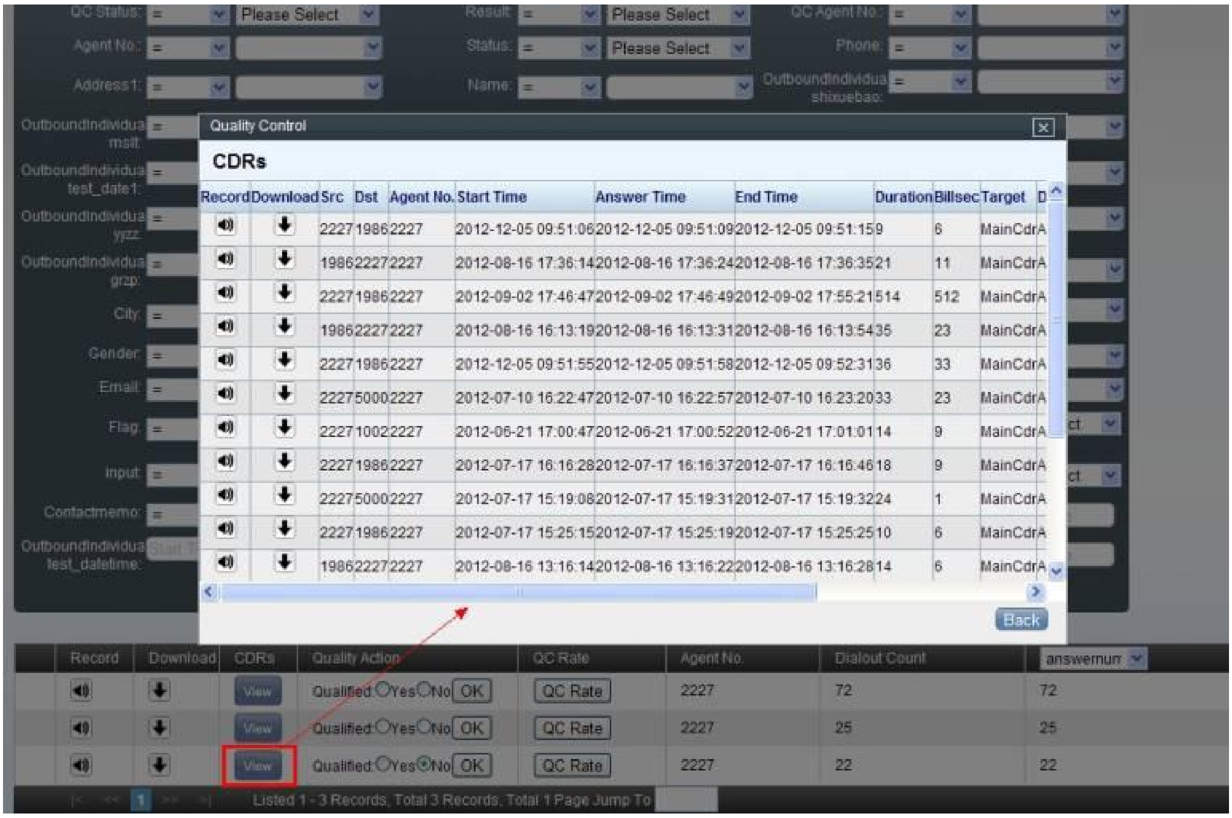
On the left menu, please go to[**Campaign**]–> [**Result**] to open the page.

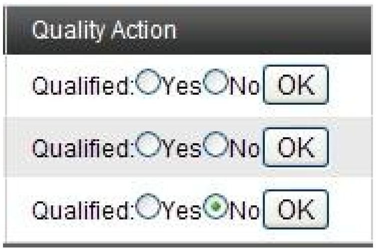


- Select campaign and survey(if it has one), then it will list all submitted records
- For each record, it has three parts, QC action, Customer Information, Survey
- **Recording** If agent talked to customer, you will see recording icon, click the icon you can listen to the conversation

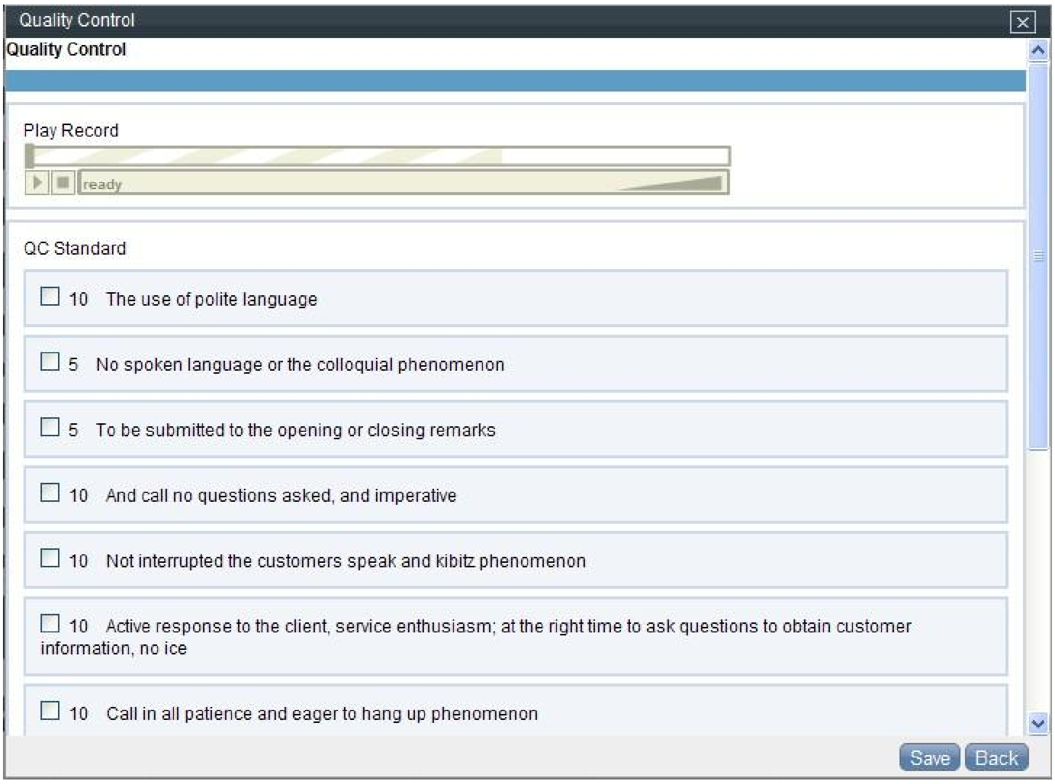


- In the same page, you can read customer and survey information.
- **View**, when there're several conversation in the conversation(as transfer), you can listen to specific recording.





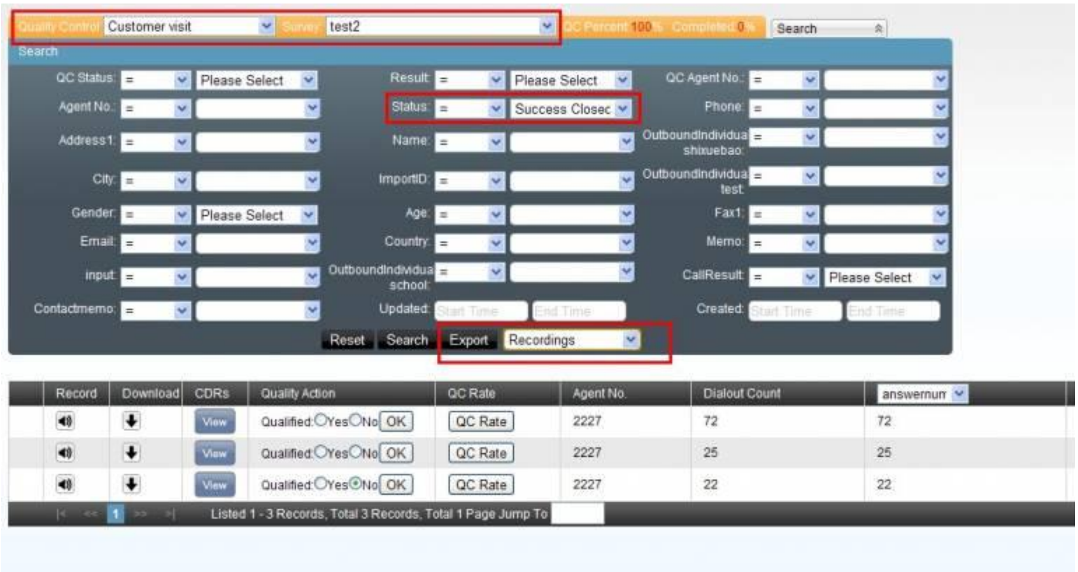
- Click QC passed or failed
- If you want to rate the record, click "QC Rate" button



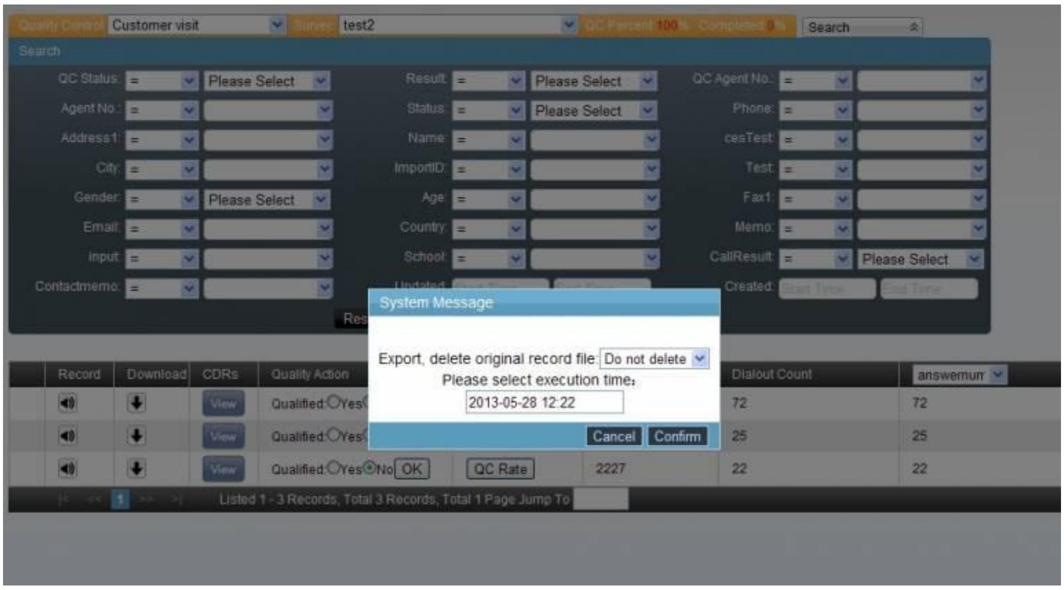
- For rate item, you can config in[qcrates]

How to export success submit recordings

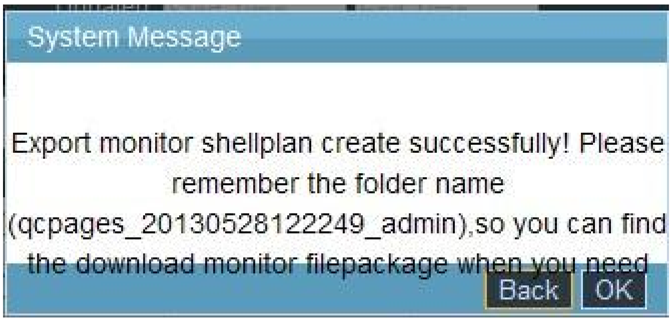
- First set the condition, select campaign and survey(if it has), then in Status, select "Success Submit", in QC Status, select "Yes"



- after Export button, select "Recording", then click Export



- System will prompt exporting setting, the time or if you want to remove recordings when export is done(no by default)
- After save, system will give you the name of the exported file

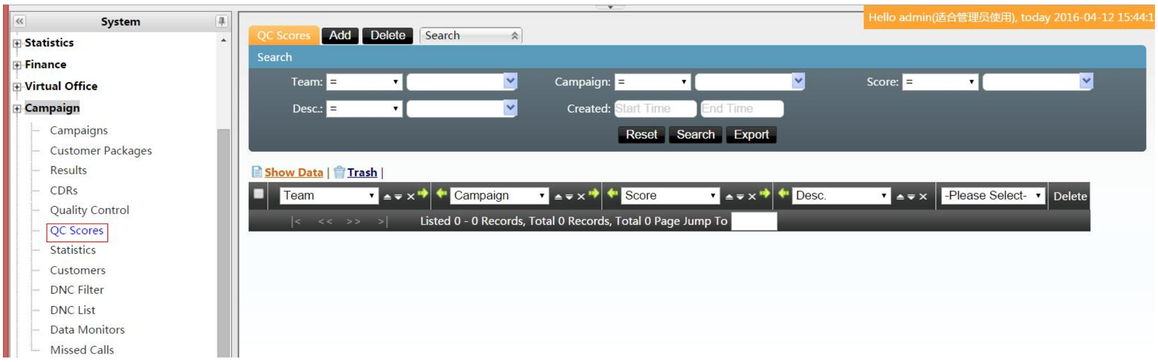


- Download
- If you enabled Web download, you can go to Call Center → Export to download
- If you want to use ftp, please go to /var/www/html/asterCC/data/monitor_download

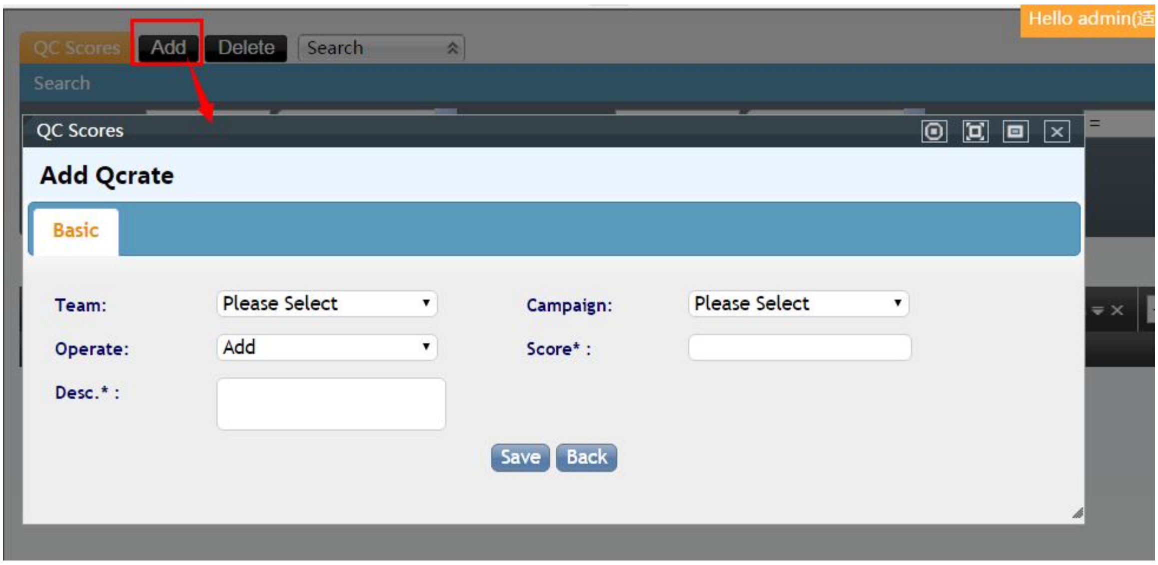
> It will only export the fields you configured in campaign → background fields

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 note select the team,it will effect all the team.On the Quality Contol 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.

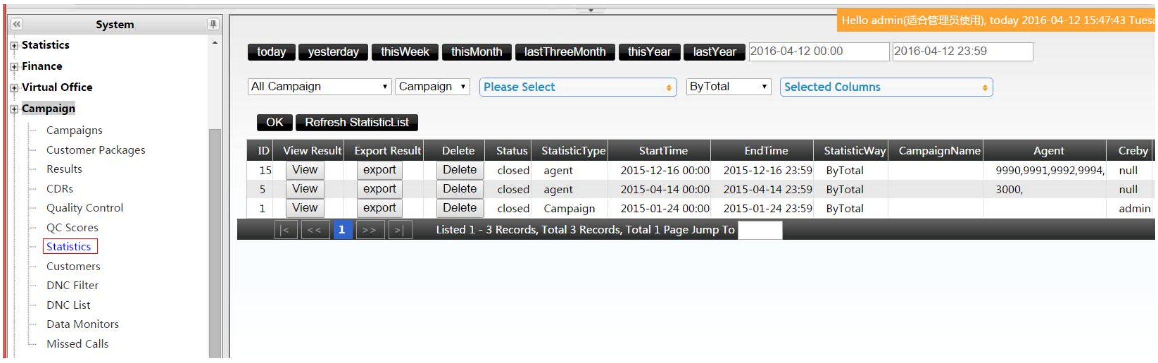
Score: Just for number,it will be used to add or reduce scores.

Desc.: The description of this score,give the resion.

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.

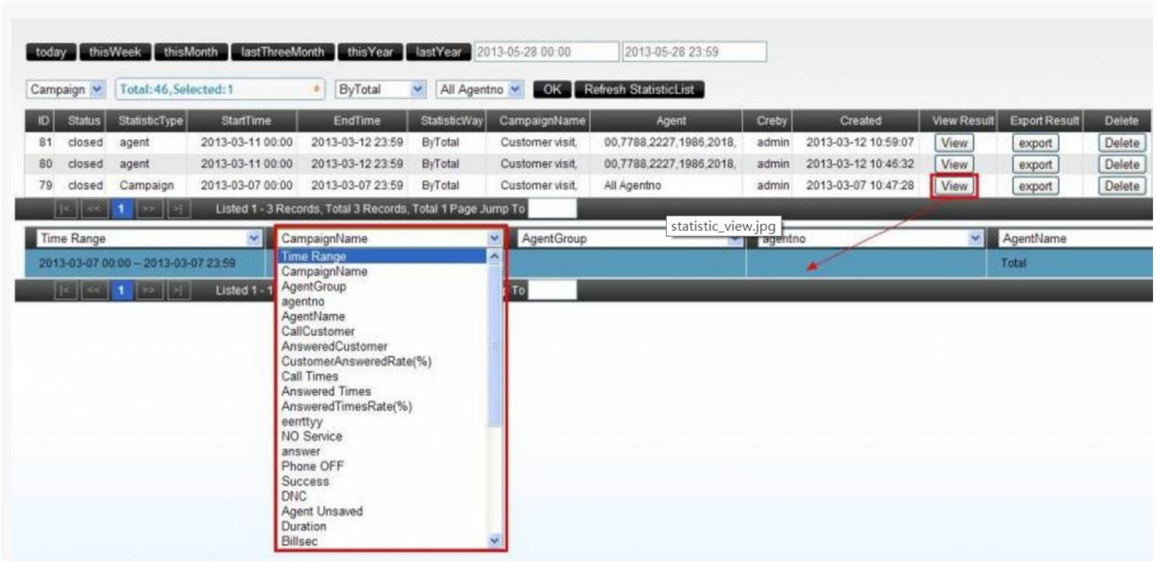
The third pull-down box is for the output form of the statistic statement, which is by total, year, quarter, month, week, day or hour.

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 campaigin.
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
Pratical Success Number: The success customer number after QC
Conversation Rate: Pratical Success Number/Answered Customer Number
Success Rate: Pratical 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

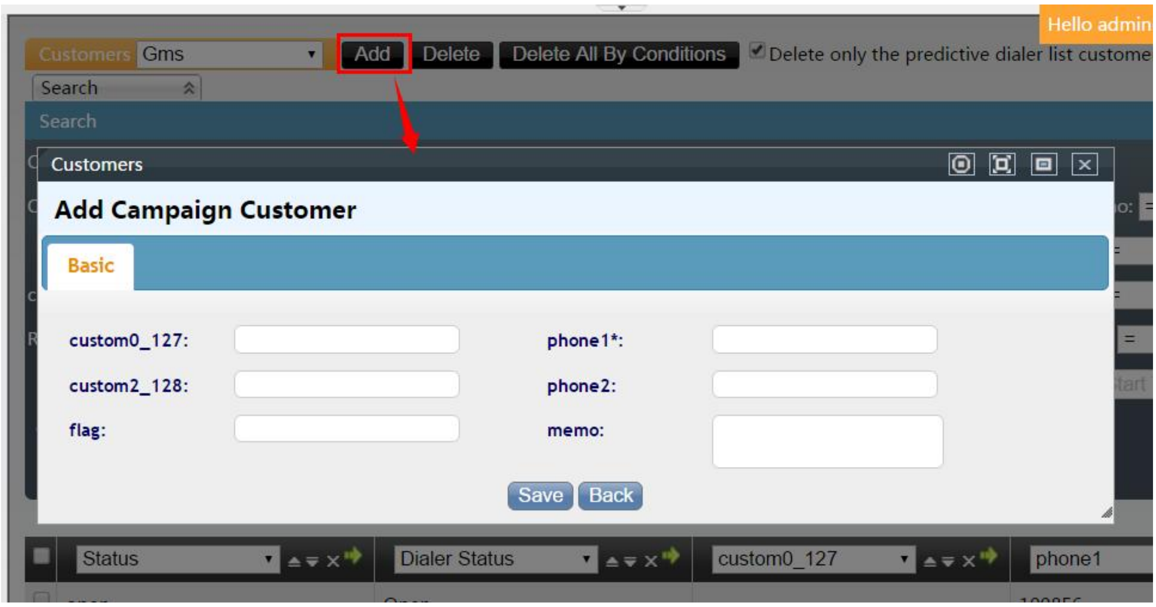
Submit Success and QC Failed: The number of customer with status "Success Submit" but failed in QC

9.8 Customers

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

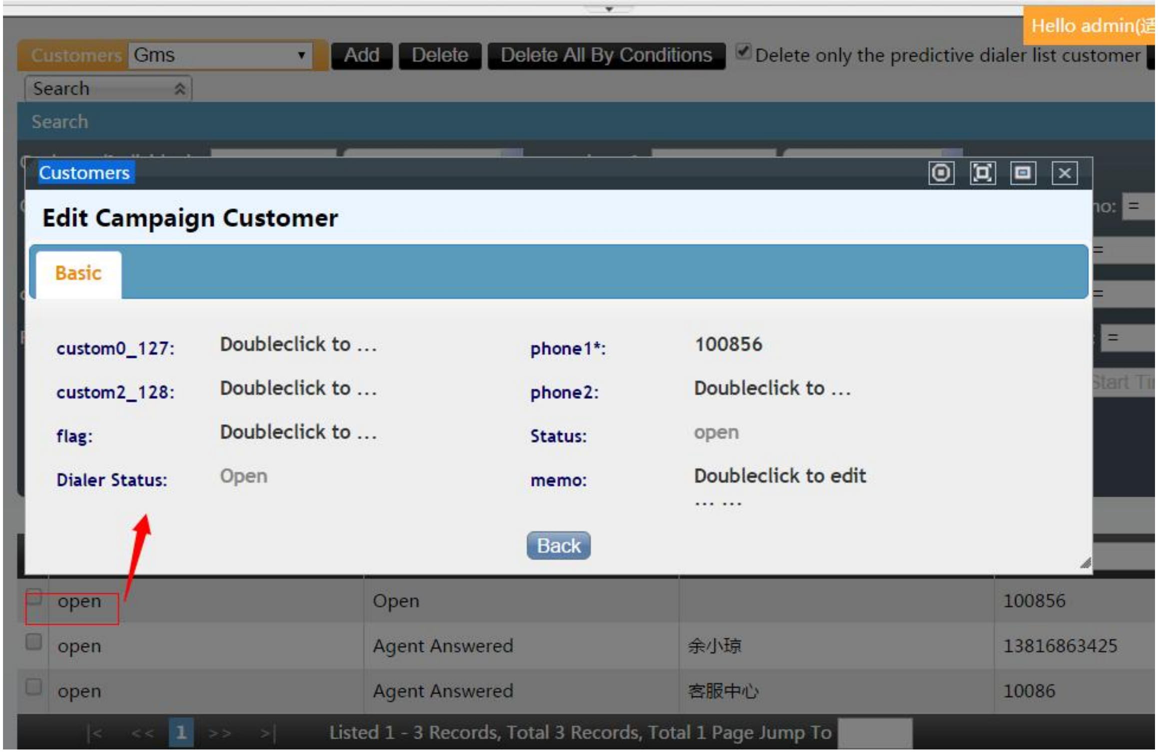
Module Function: To check the detail customer info of a Customer package

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

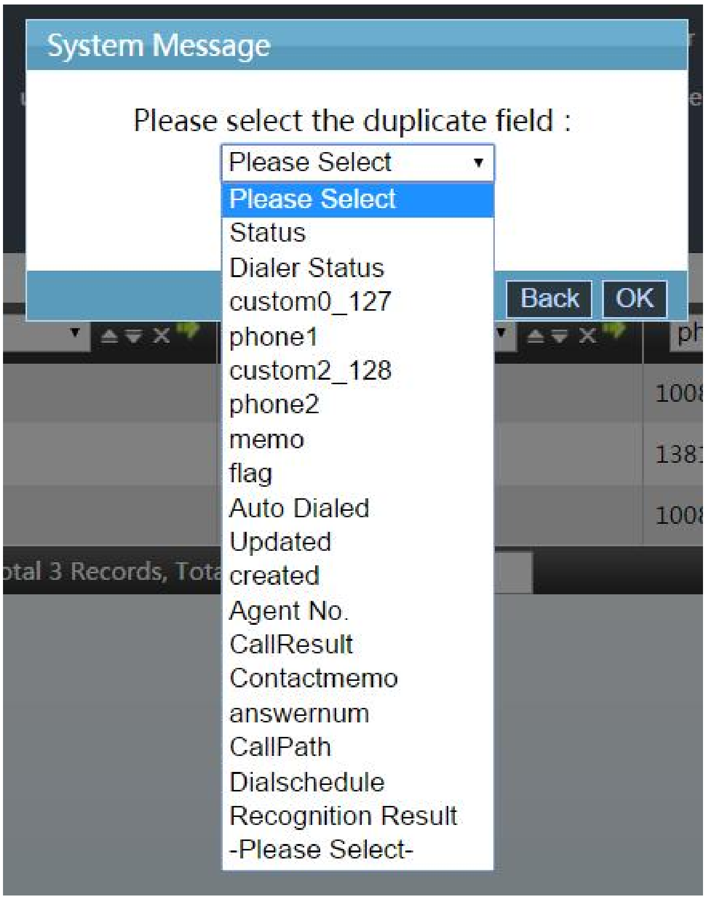


The fields are corresponding to Campaign background display fields(editable) and order. Only for those fields which set editable on the campaign background can be editable in this page.

Duplicate data check

Click 

to check the duplicate data.



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 delet predial list data and the customer package data at the same time.

Delete

Click Delete to delete all the customers' data listed bellow.

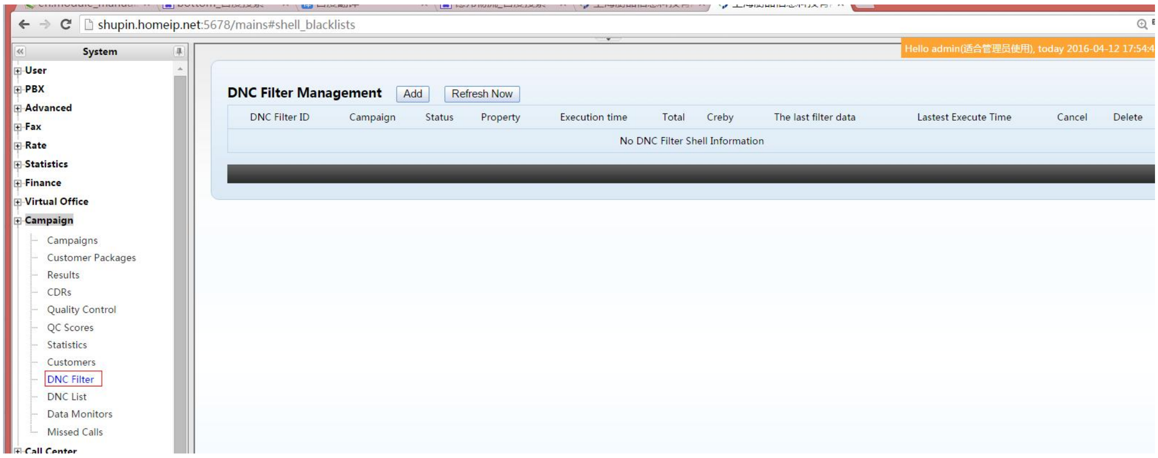
Delete all by condition

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.

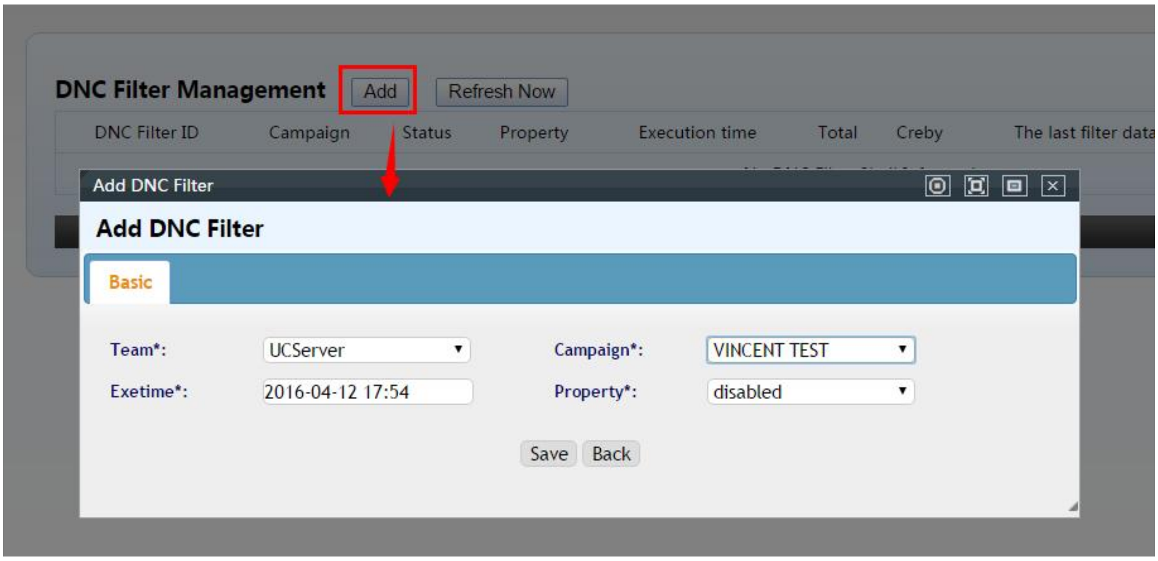
9.9 DNC Filter

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



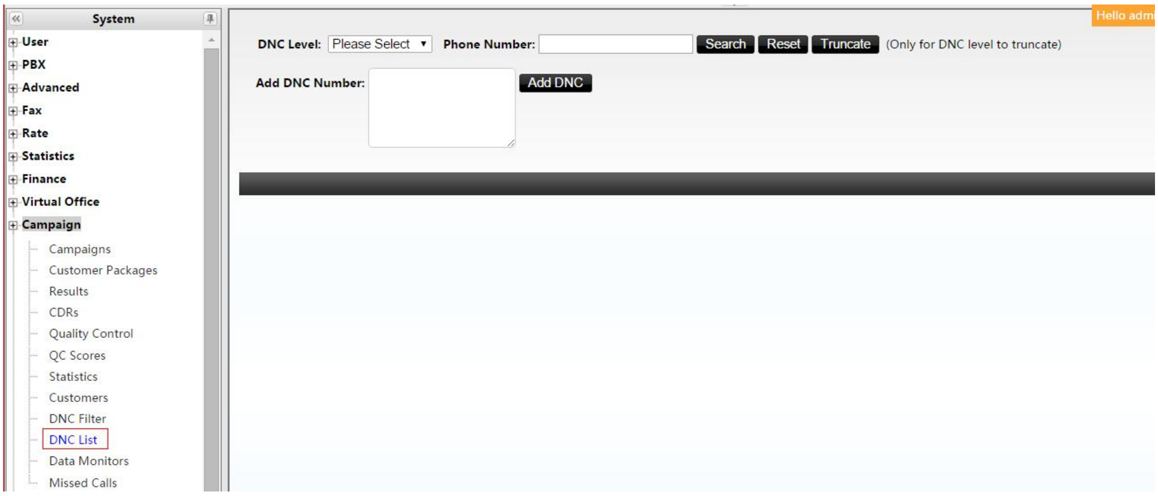
Team: To which team this DNC belongs to;
Campaign: Select a campaign;
Exetime: To select a fixed time to do the filter;
Property: The status of filter plan;
Click**[Save]**when finishing the page, then it will show the newly added data on the page.

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.

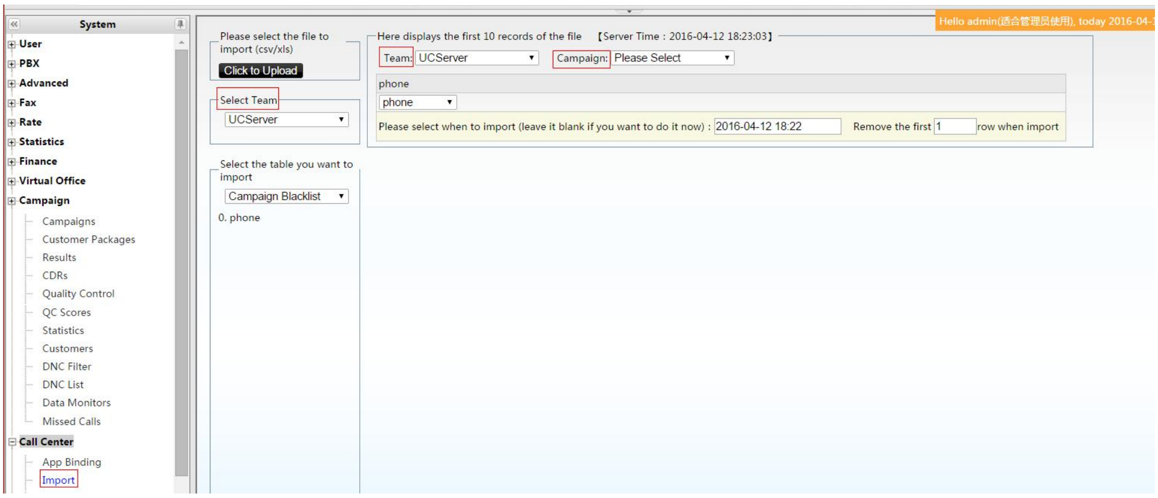
9.10 DNC List

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.

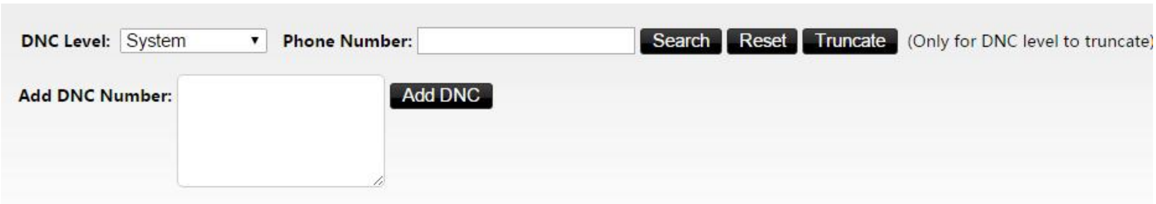
- If leave Team and Campaign blank,the import blacklist will be system level to filter all calls.
- If only select a team, the import blacklist will be team level to filter calls in this team.
- If select a team and a campaign, the import blacklist will be campaign level to filter calls in this campaign.

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

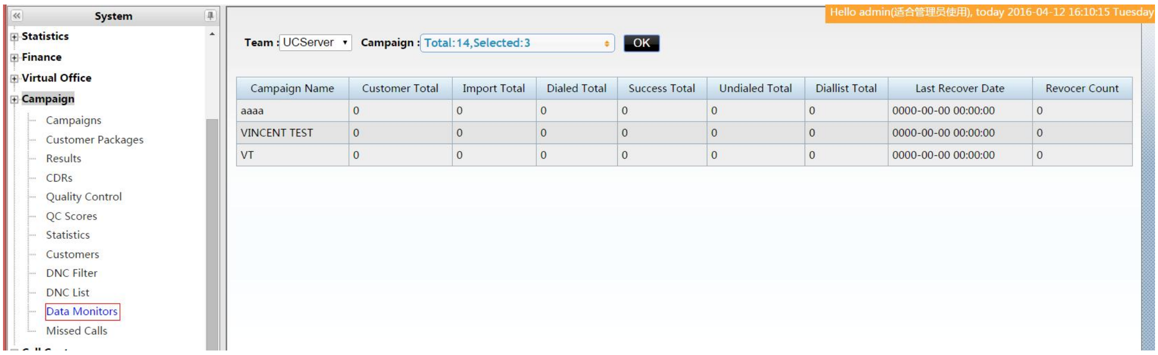
禁拨黑名单的查看

You can check the blacklist according to different DNC Level(System,Team,Campaign)



9.11 Data Monitors

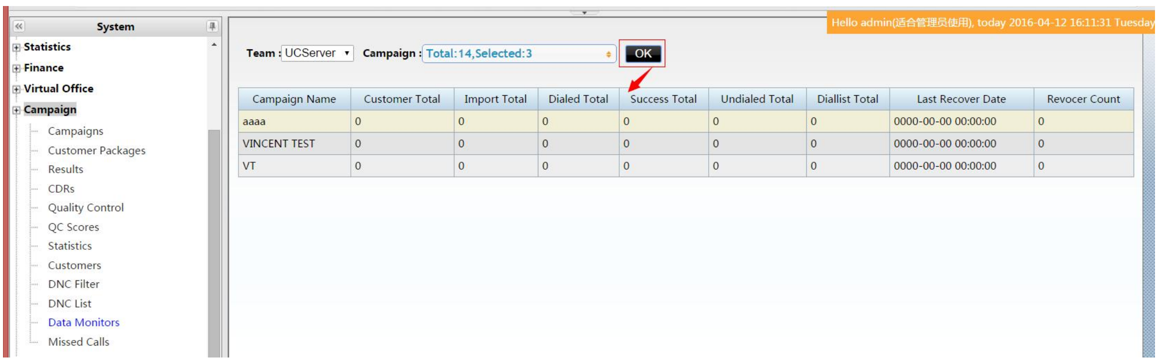
On the left menu, please go to[**Campaign**]–> [**Data Monitors**] to open the page.



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 visist` campaign

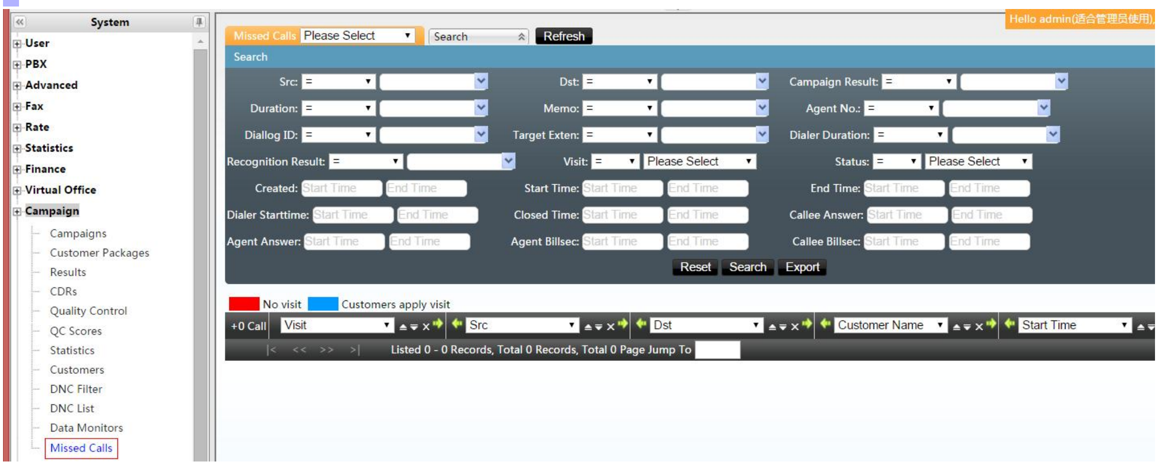


If want to choose many campaigns,every campaign will be individed into line to show the detail

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.

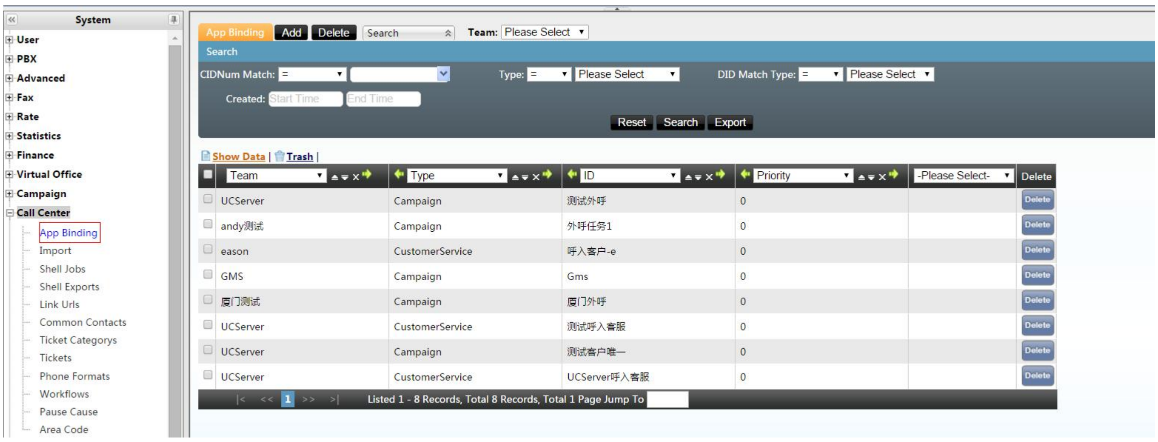


Module Function:

10 Call Center

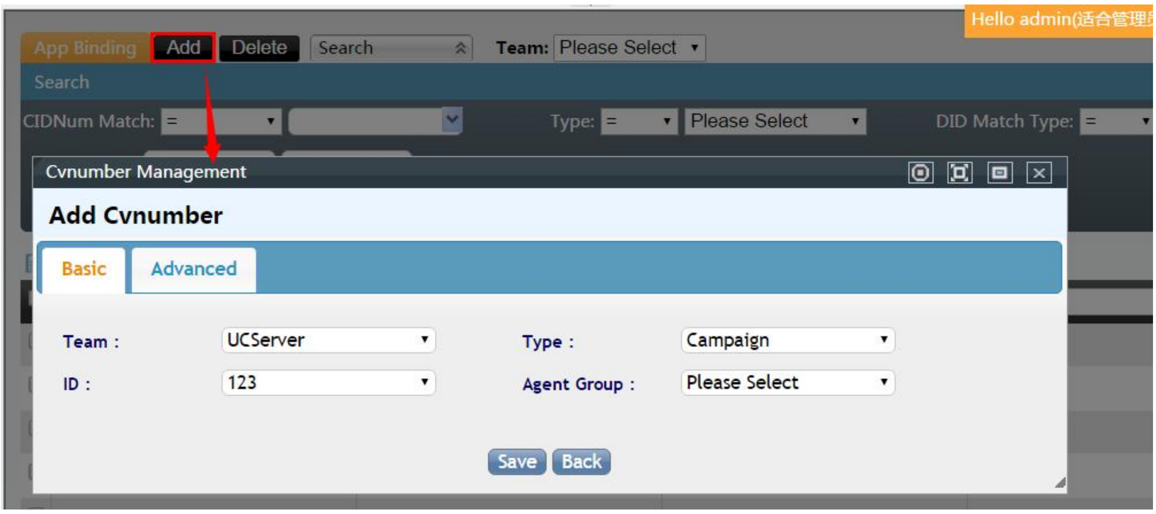
10.1 App Binding

On the left menu, please go to[**Call Center**]-> [**App Binding**] to open the page.



Module Function: The function of module is binding the application and DID together, the application includes: Virtual office, Campaign and Customer Service.It can implements 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 numnber?If the company has customer service department,the customer should dail a phone number into it,we call the phone number is 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.

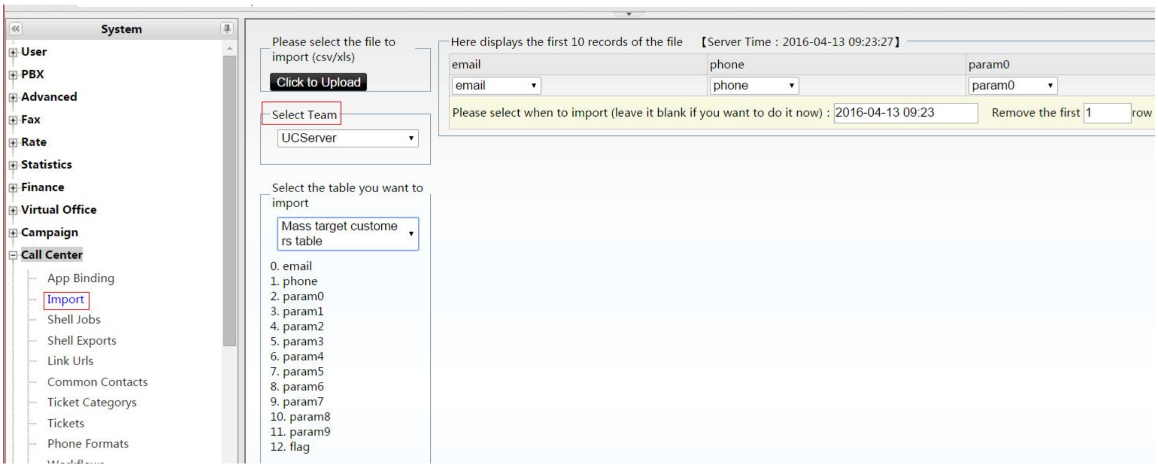
You can combined more than one conditions to limit application binding,for example: you can use the united limits likes DID,Trunk and CIDNum to binding a application.

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.

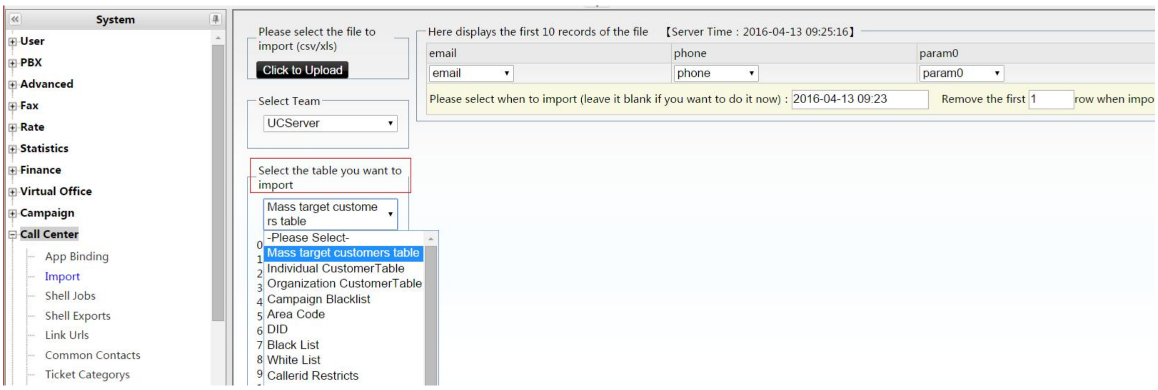
10.2 Import

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



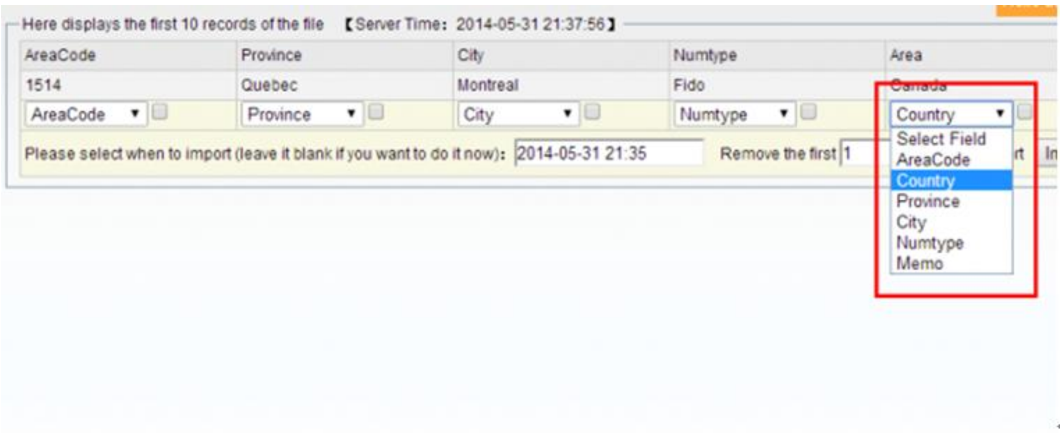
- On right panel, it will give you the first 10 records in the file

- 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

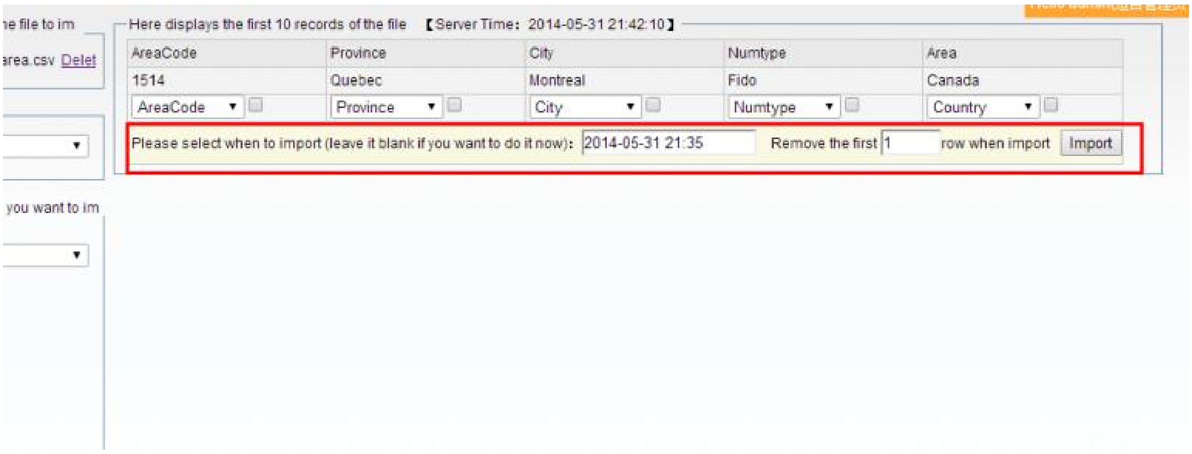
Import

- After importing, select the table your want to import to, system will try to match the header

- If the header doesn't match, you can change it manually

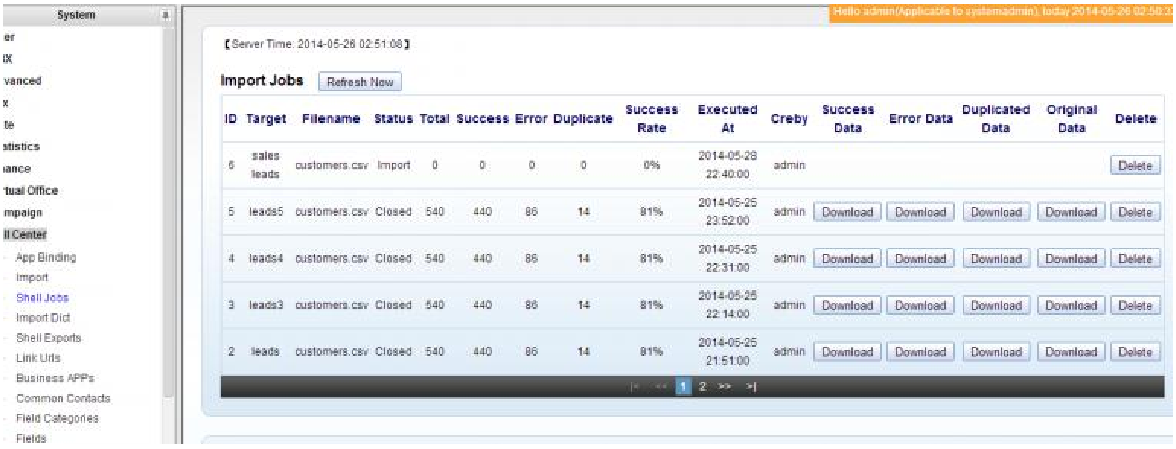


- System gives the option to set a import time and remove top records

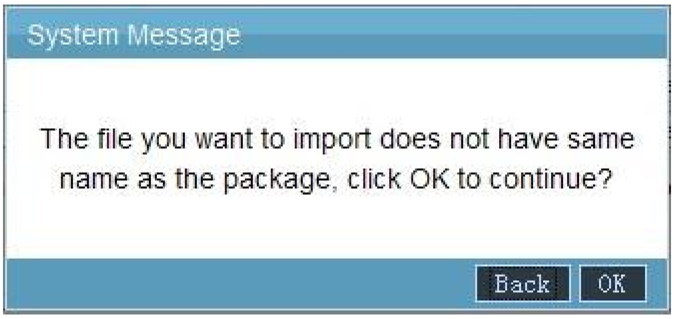


If your import job is not processed in 1 minute, please make sure your server time is correct

- You can go to Call Center → Shell Jobs to check import process



- Click [Import], you probably see this alert



- 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.

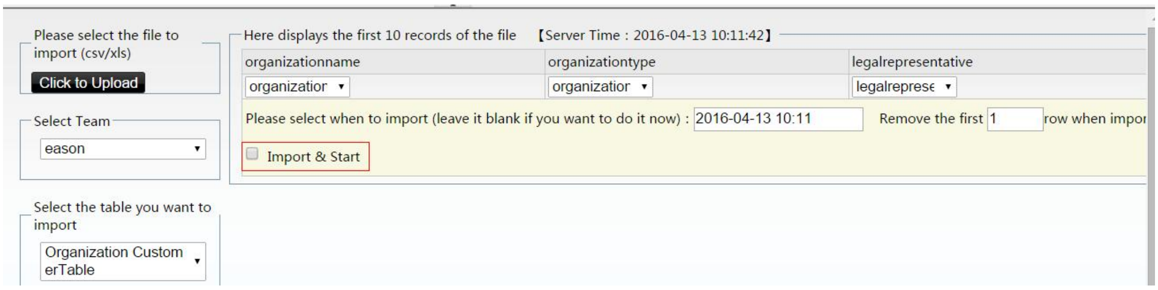

【Server Time: 2014-05-31 21:46:23】

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

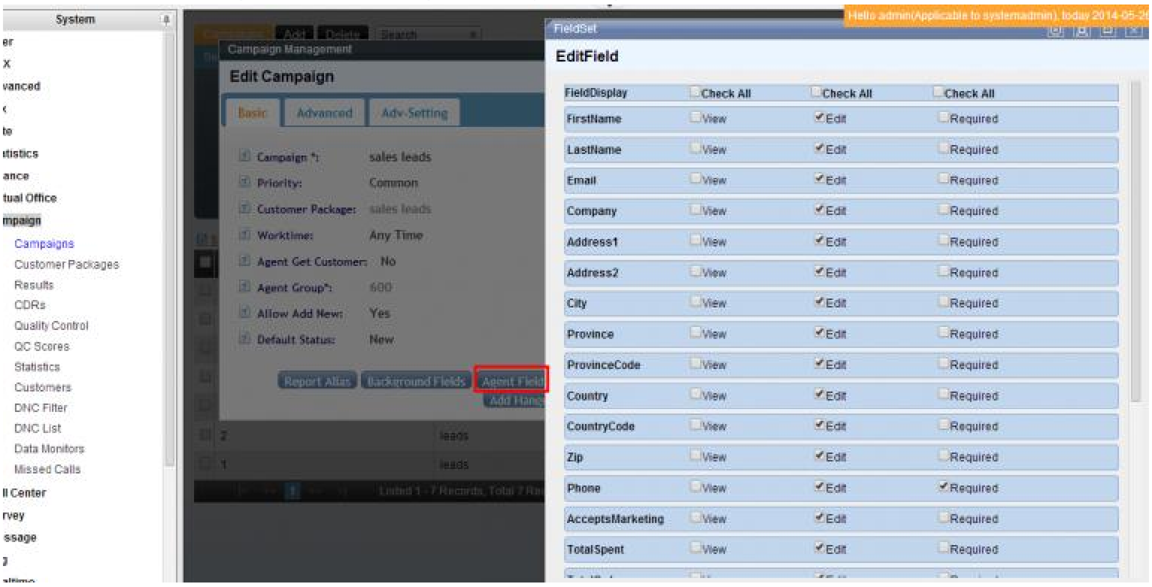
Import & Start

- 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.

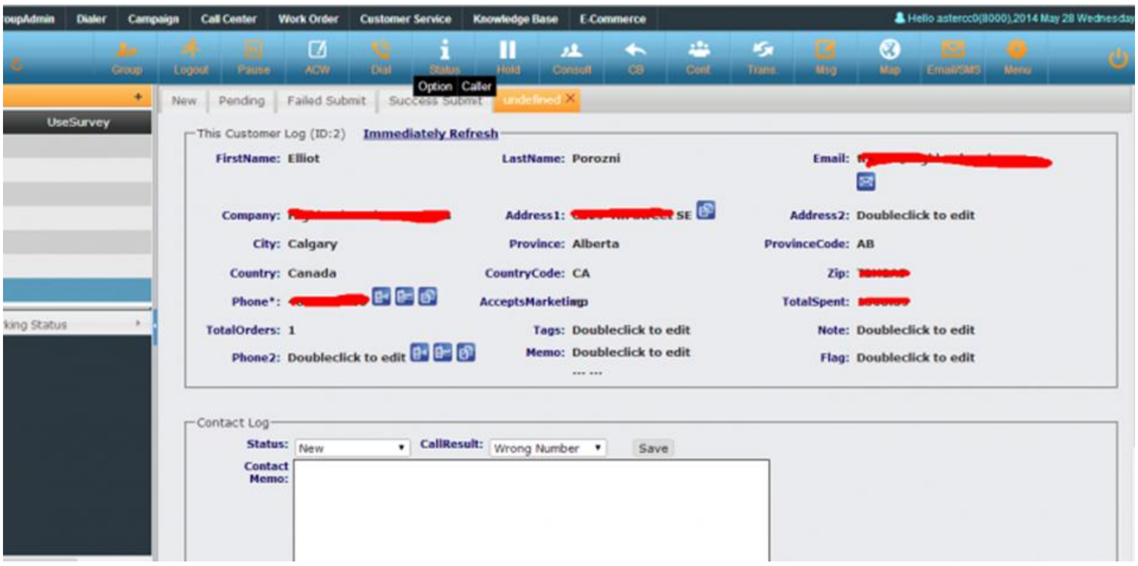


- Click "Import & Start", you will see system will create the fields based on the header

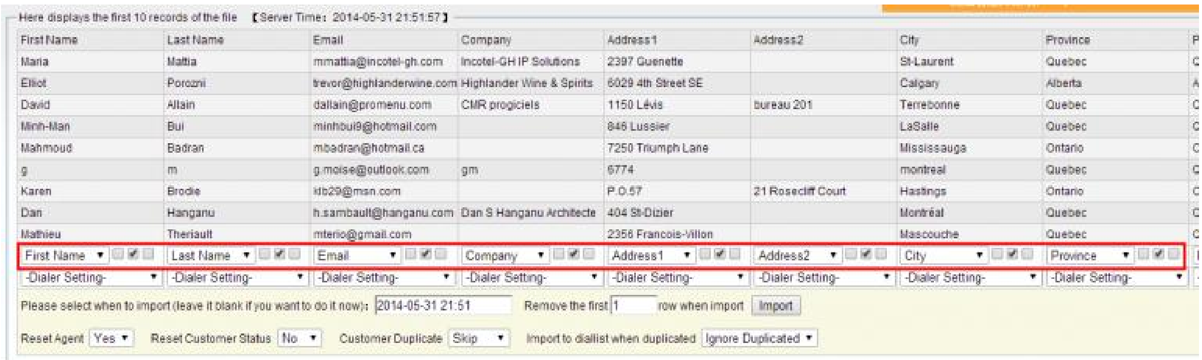
- In your header, it will try to match some special fields, you can adjust if it's wrong
- Email – show email icon
- Phone – show click to call icon and sms icon
- Fax – show fax icon
- Address – show map icon
- Go to Campaign → Campaign to adjust agent view if you want



- 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



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

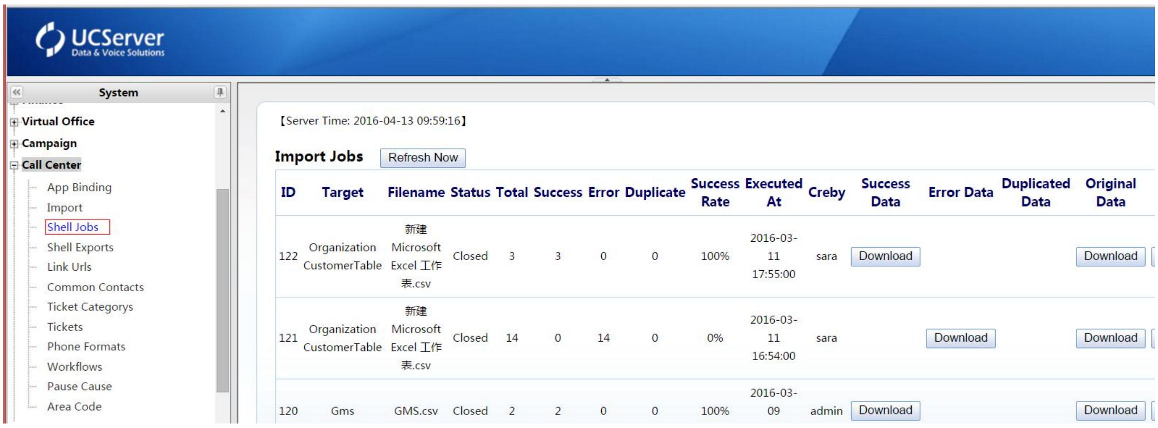
Options when using predictive dialer

- 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

- Reset Agent
- duplicated customers will get un-assigned
- Import to diallist when duplicated
- Ignore duplicated: don't import if duplicated found
- All: import to dial list any way
- Ignore success: don't import if duplicated 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.

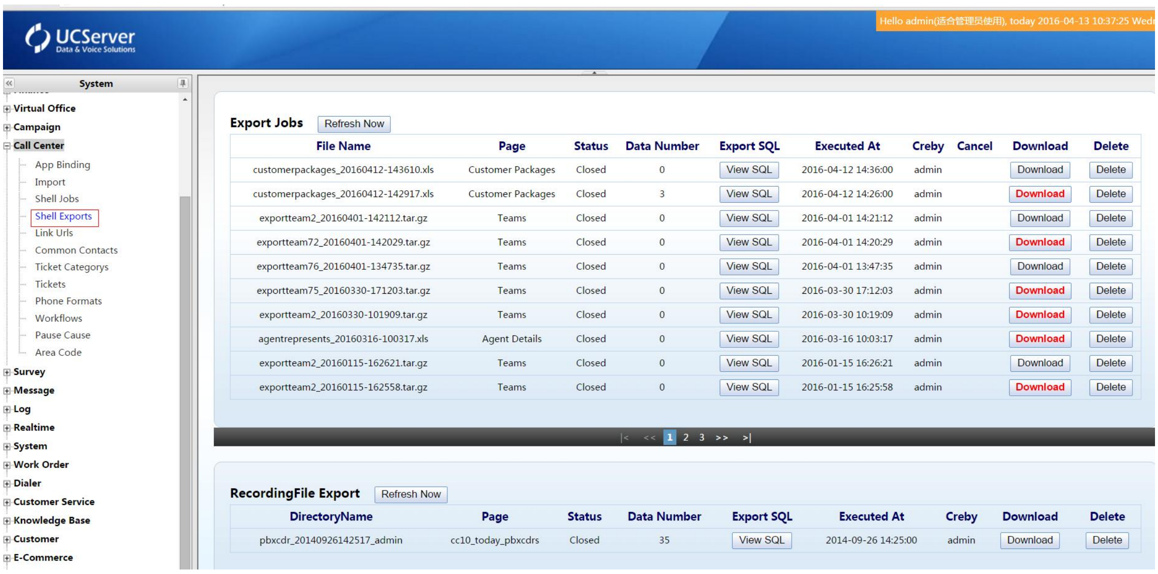


Module Function: In this page, you can check the all the import jobs.
ID: After doing import, the system will generate a job ID, please use this ID to find the corresponding importing job.
Target: Which table witll this job import to.
Filename: The imported filename, to check is the file the right one.
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 importe.
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.

10.4 Shell Export

On the left menu, please go to[**Call Center**]-> [**Shell Export**] to open the page.



Module Function: In this page, you can check the all the export jobs and export recording files.

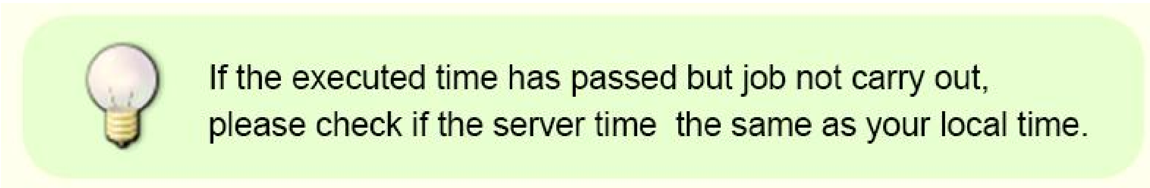
Export Jobs

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

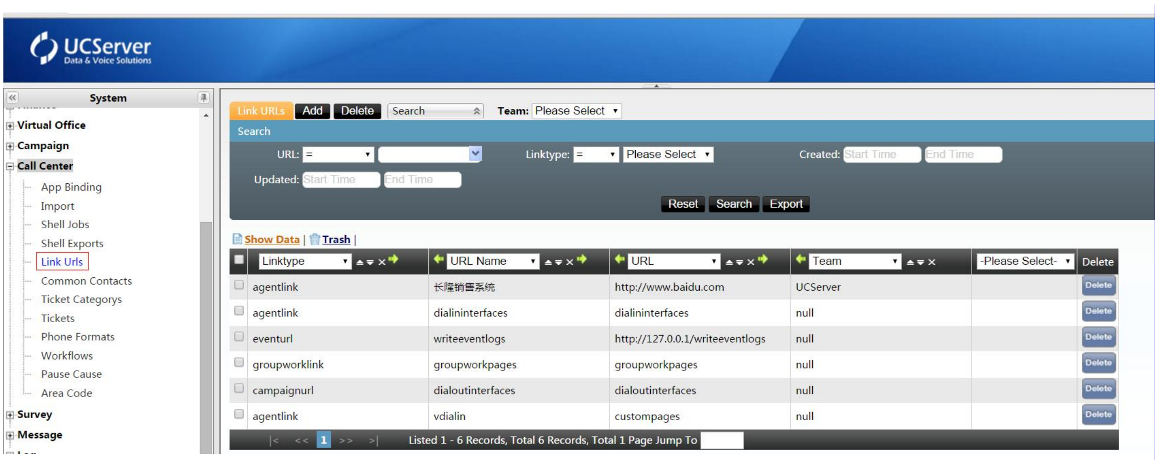
Recording File Export

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



10.5 Link Urls

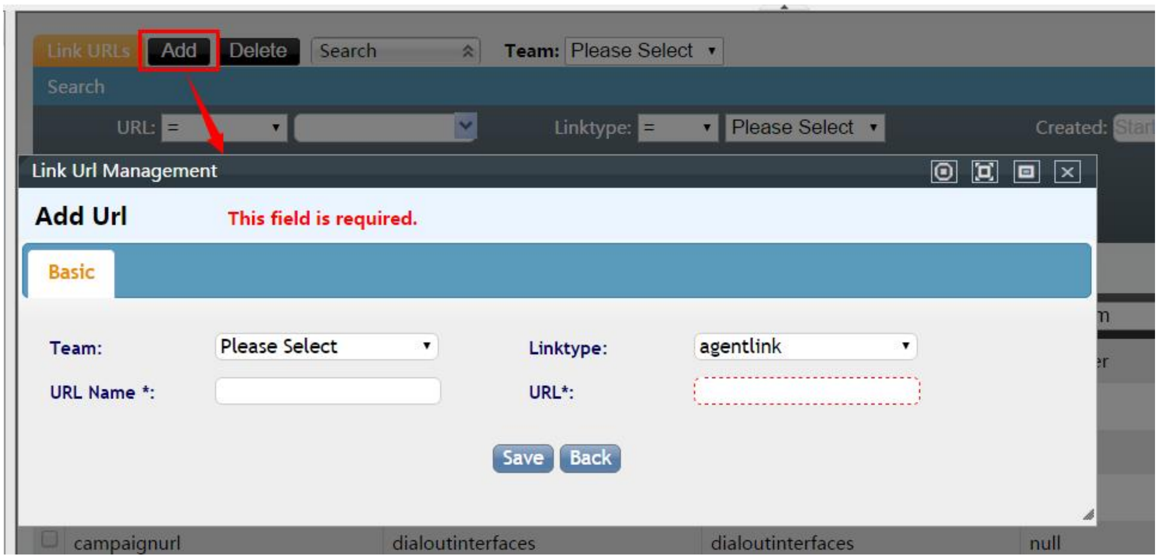
On the left menu, please go to[**Call Center**]–> [**Link Urls**] to open the page.



Module Function: To set a link URl for system application module.This module is very useful as the URL can be used repeatly.

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.

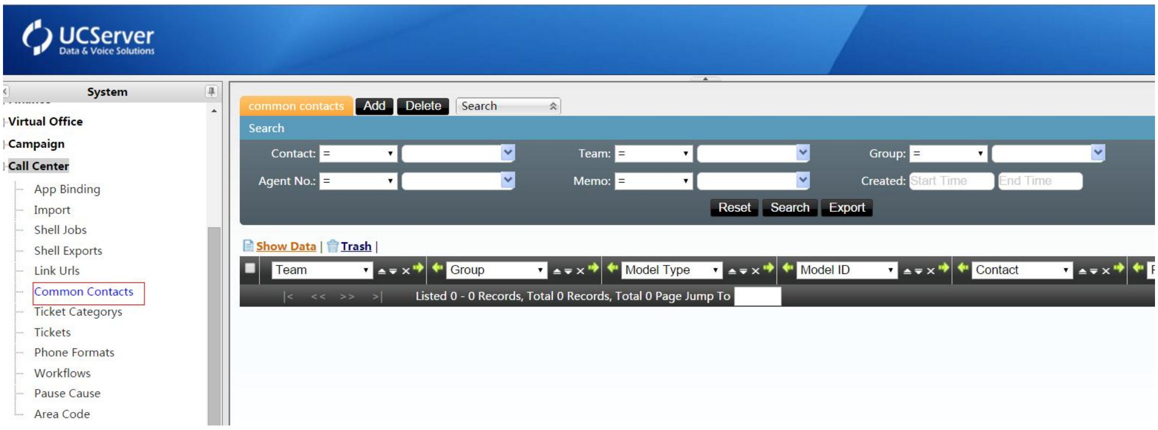
Eventlink，the system calling event sending link, to record the calling.

URL Name： Name this URL，

URL: Input the url, like http://www.uscerver.cc

10.6 Common Contacts

On the left menu, please go to[**Call Center**]–> [**Common Contacts**] to open the page.

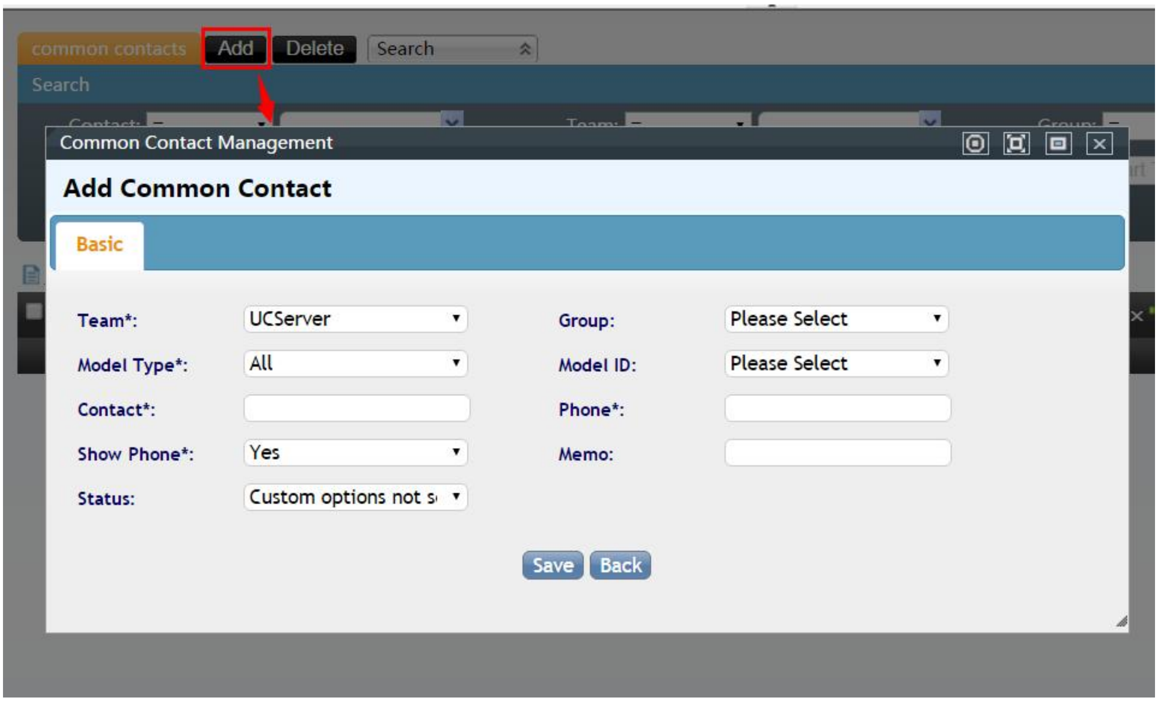


Module Function: Is like a phone book, which record common phone numbers and set a link URl for system application module.This module is very useful as the URL can be used repeatly.(It will show up when agent click Consult and when doing transfer in virtual office)

- 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

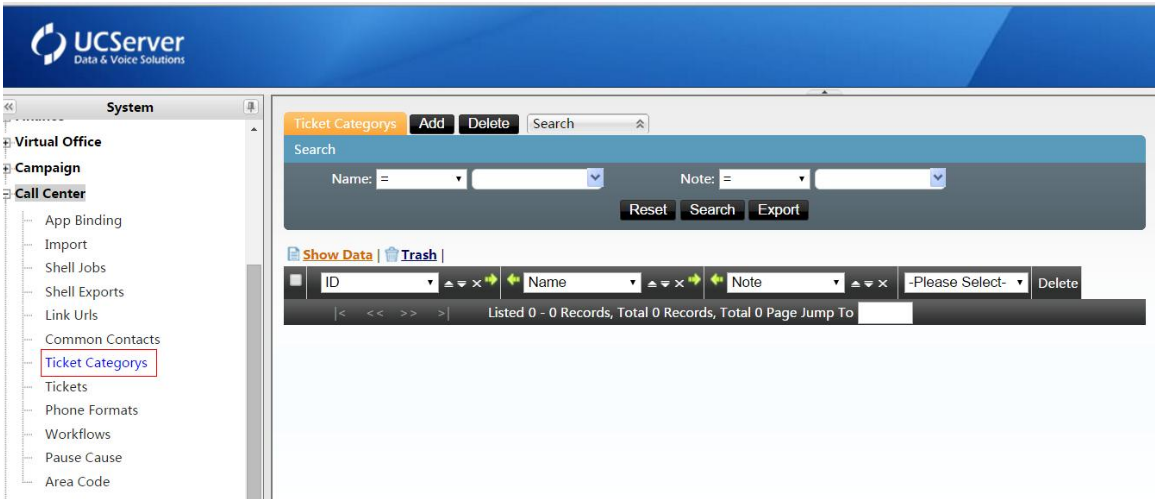
Click**[Add]**to add common contact.



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

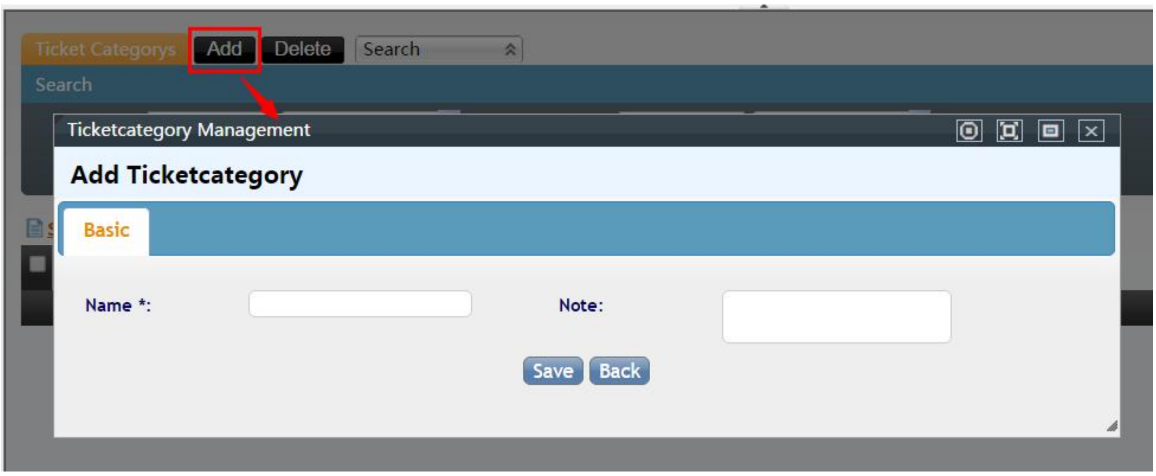
On the left menu, please go to[**Call Center**]–> [**Ticket Category**] to open the page.



Module Function: To classify the tasks, for better task management;

Add

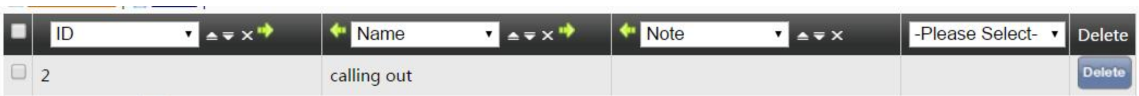
Click【Add】to open the page.



Name: Name this category;

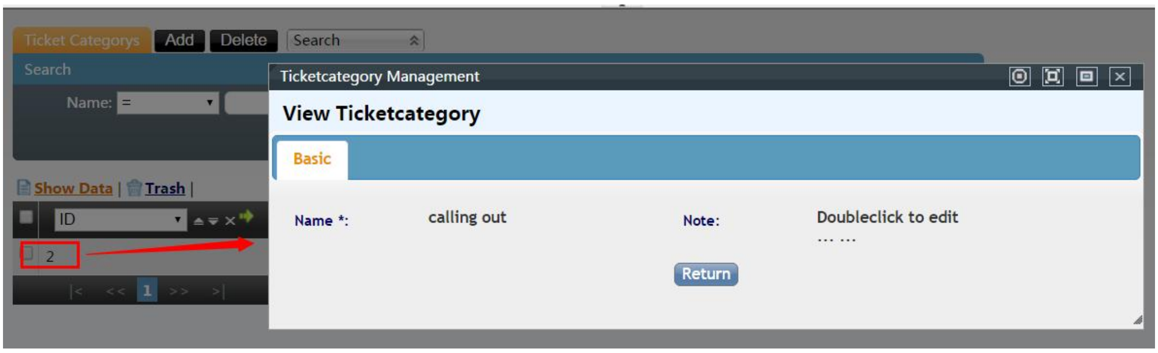
Note: Gvie a note to this category;

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



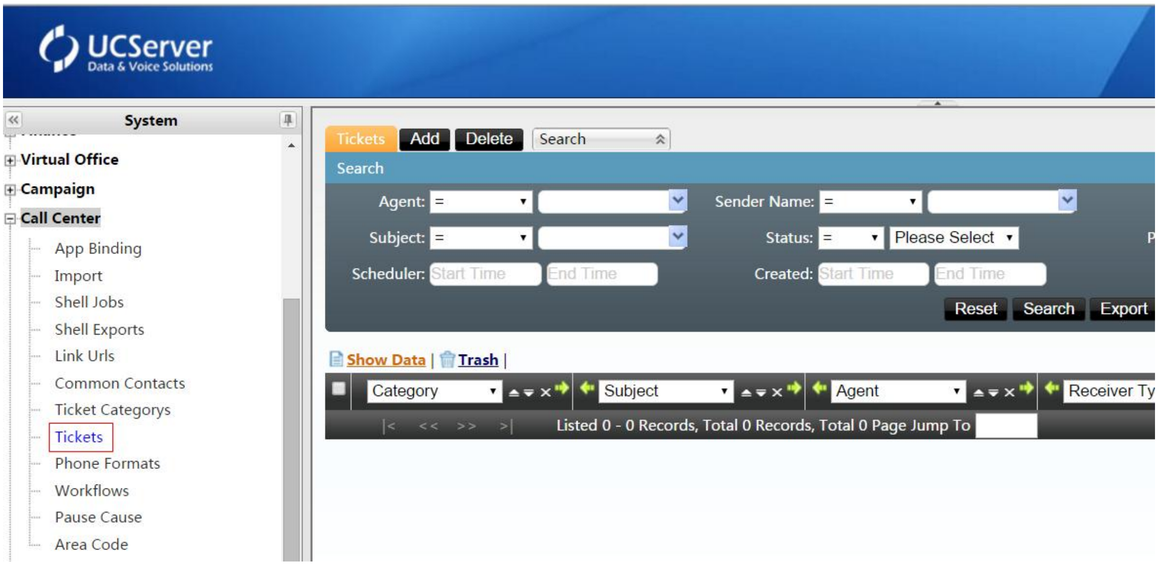
Edit

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



10.8 Tickets

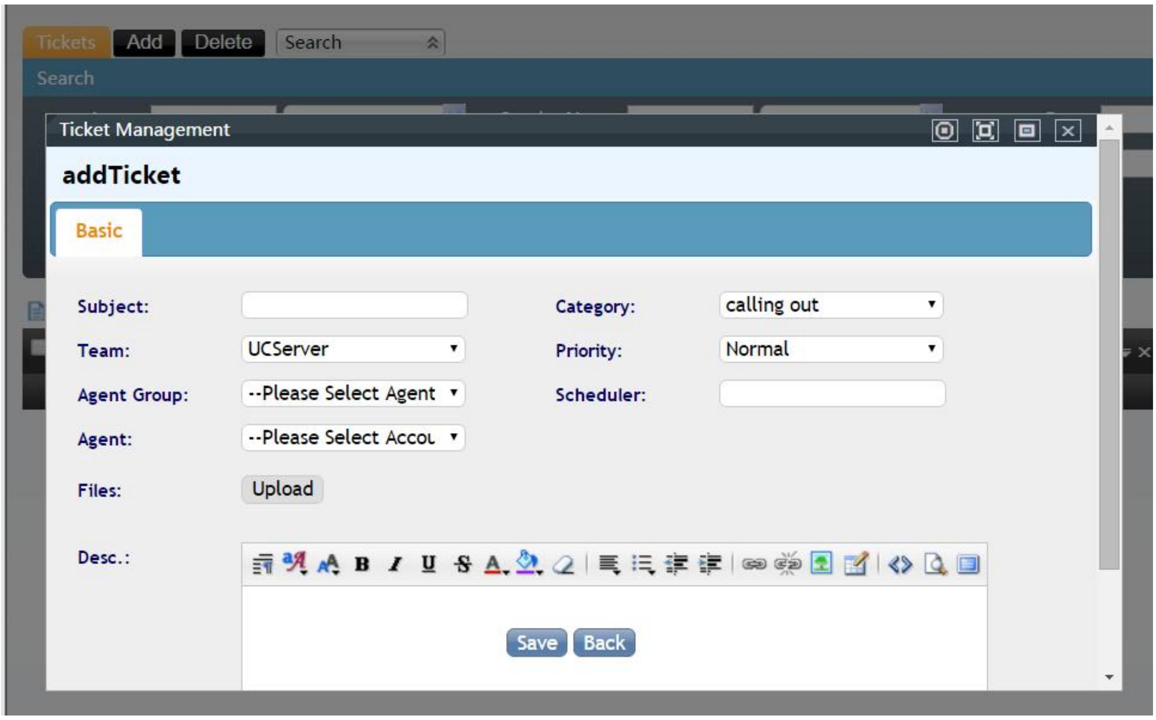
On the left menu, please go to[**Call Center**]–> [**Ticket**] to open the page.



Module function: To release and manage tasks.

Add

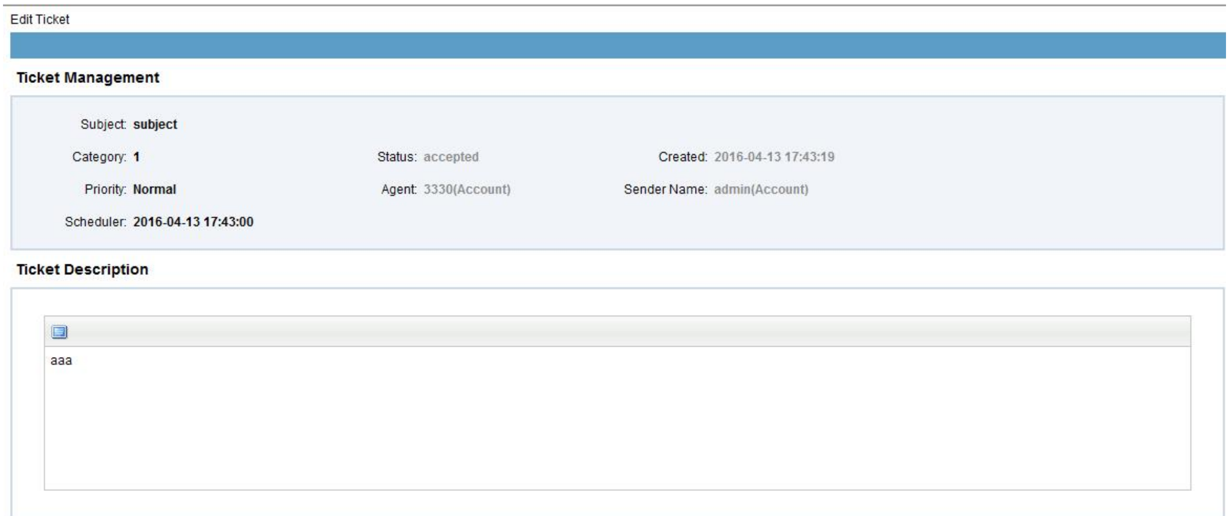
Click【Add】to open the page.

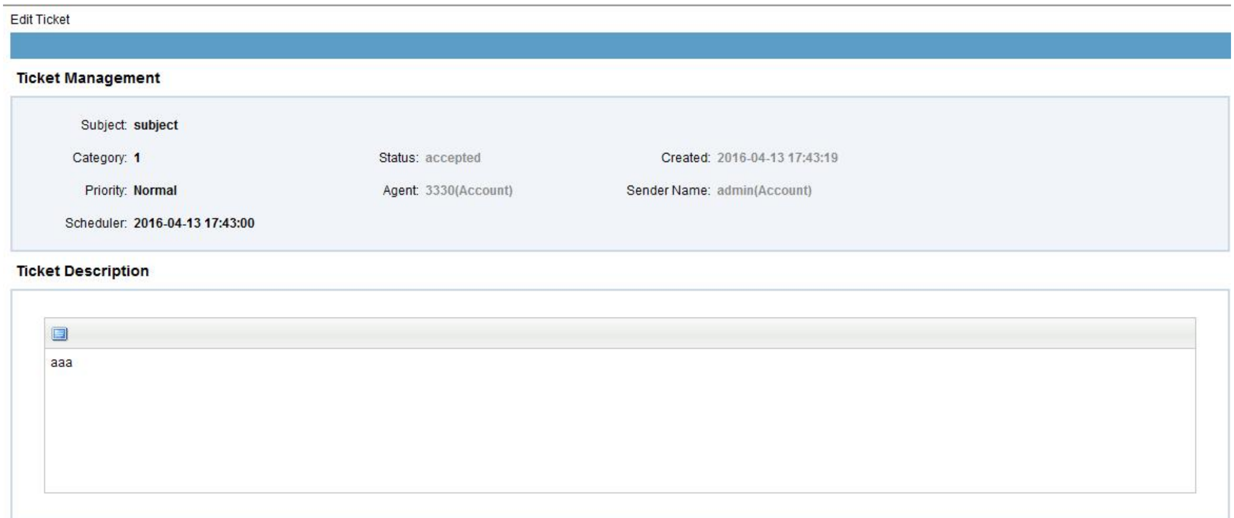


Subject：Name this task;
Category：To select a category;
Team: To which team this task assign to;
Priority: The priority of this category(Normal,Important,urgent,very urgent);
Agent Group：To which group to complete the task; If no agent group selected, the Agent field can be extension or no agent.If agent group seleted, 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

Edit

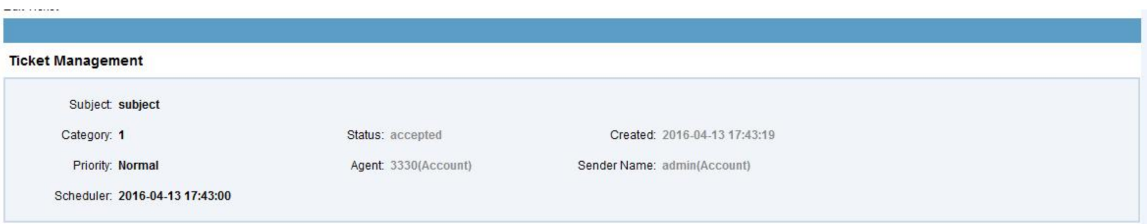
You can double click the field to re-open the edit page and edit them.





There are five parts in this page

a.Ticket Management



The gray field is not editable while the black field is editable.These are basic info of this ticket.

b.Ticket Description

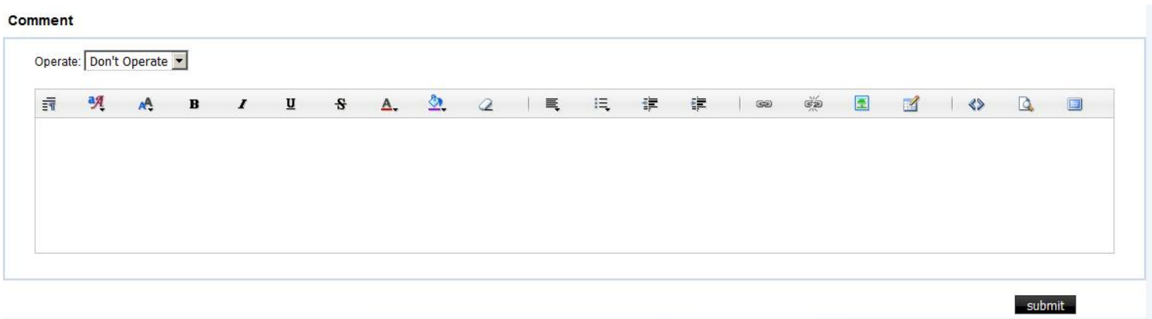
The description of this ticket;

c.File

d.Ticket List

The ticket modified history;

e.Comment



Give comment and feedback to this ticket;

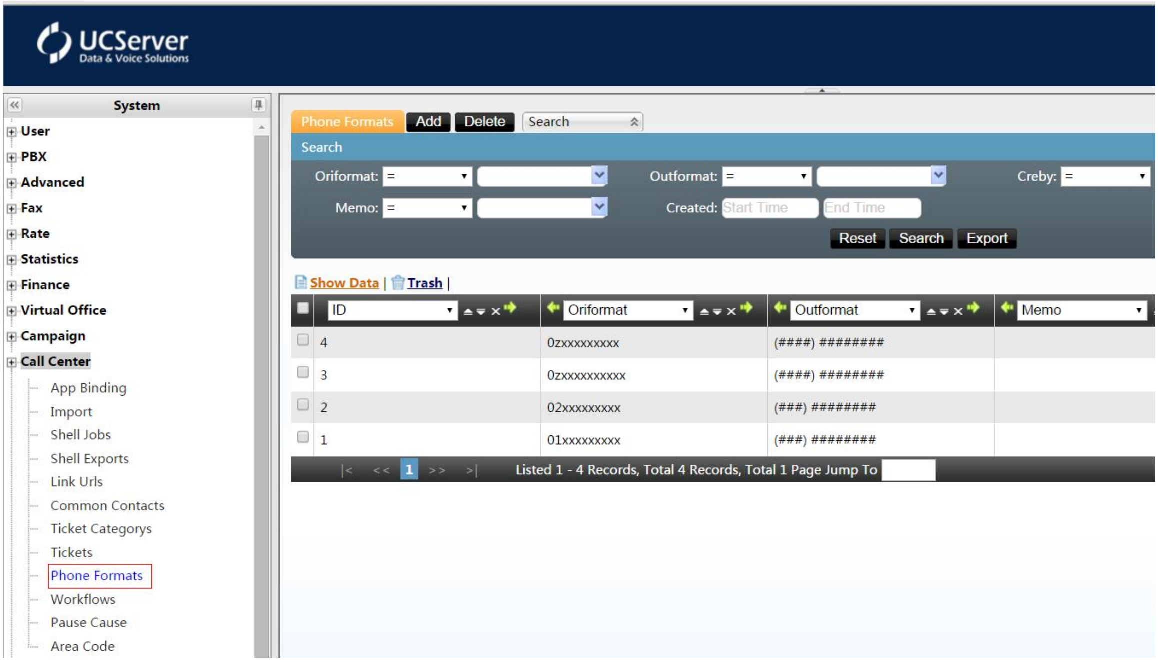
Operate: You can shift and receive the ticket.Also can give operation to the ticket status(completed,return, cancel)

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.

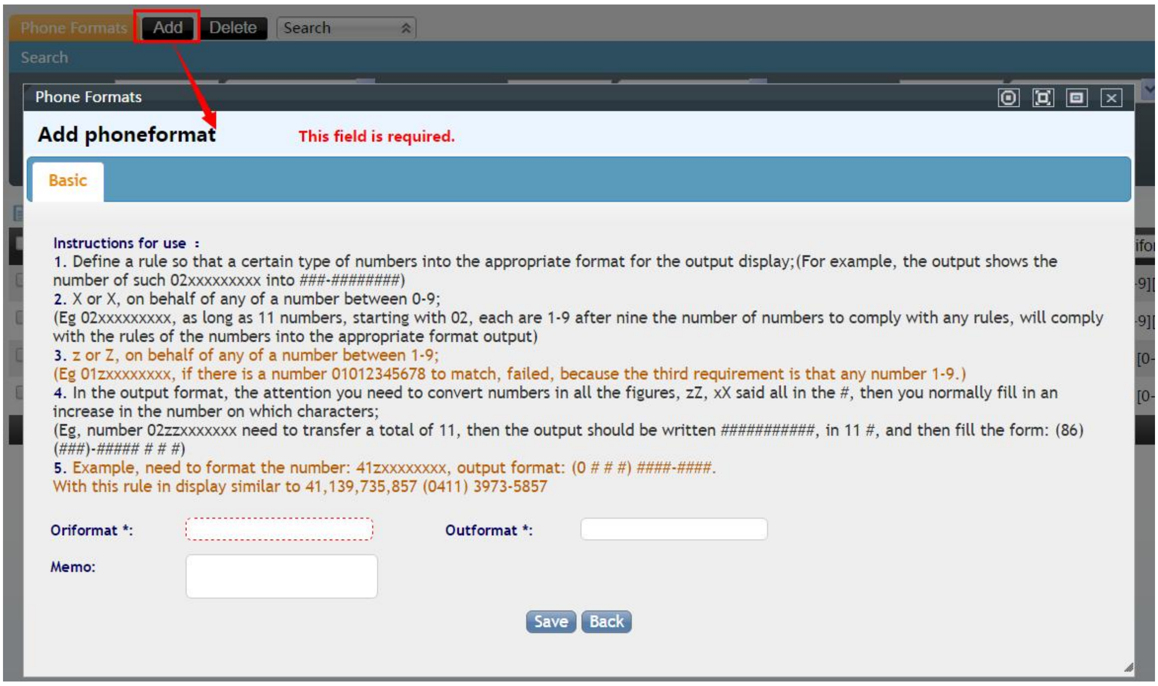


Module Function: To set the phone numbers' format;

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 02xxxxxxxxx into ###-########)

2.X or X, on behalf of any of a number between 0-9;

(Eg 02xxxxxxxxx, 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 01zxxxxxxxx, 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;

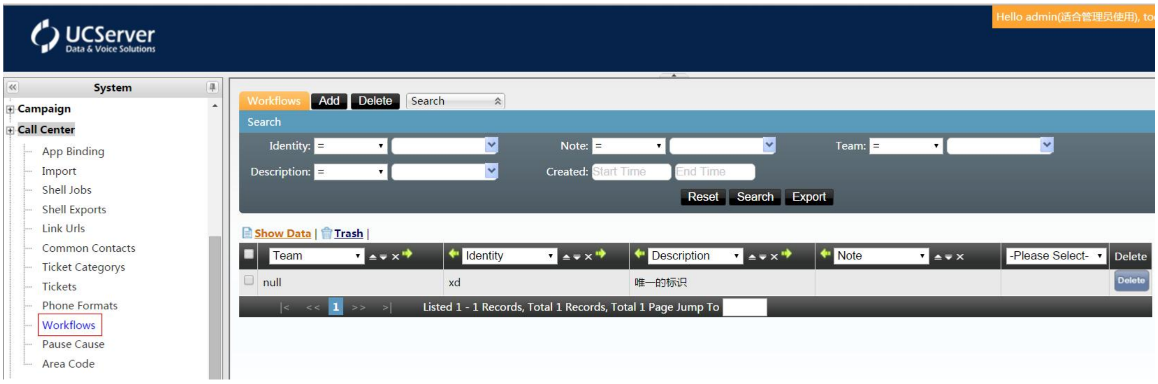
(Eg, number 02zzxxxxxxx need to transfer a total of 11, then the output should be written ###########, in 11 #, and then fill the form: (86) (###)-##### # # #)

5.Example, need to format the number: 41zxxxxxxxx, output format: (0 # # #) ####-####.

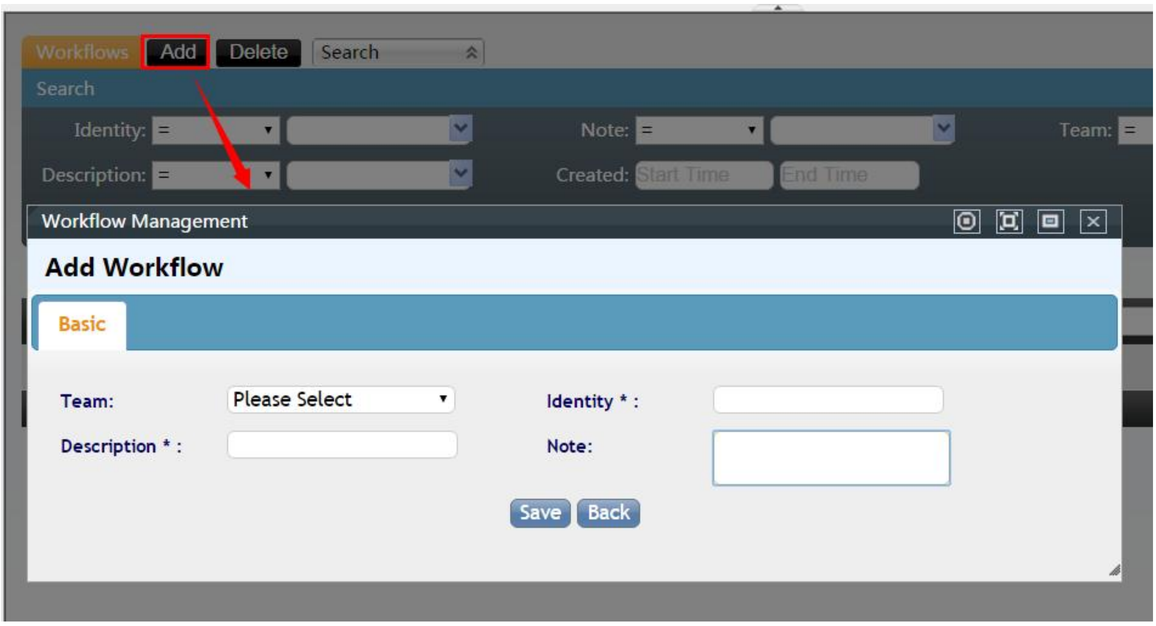
With this rule in display similar to 41,139,735,857 (0411) 3973-5857

10.10 Workflows

On the left menu, please go to[**Call Center**]–> [**Workflows]** to open the page.



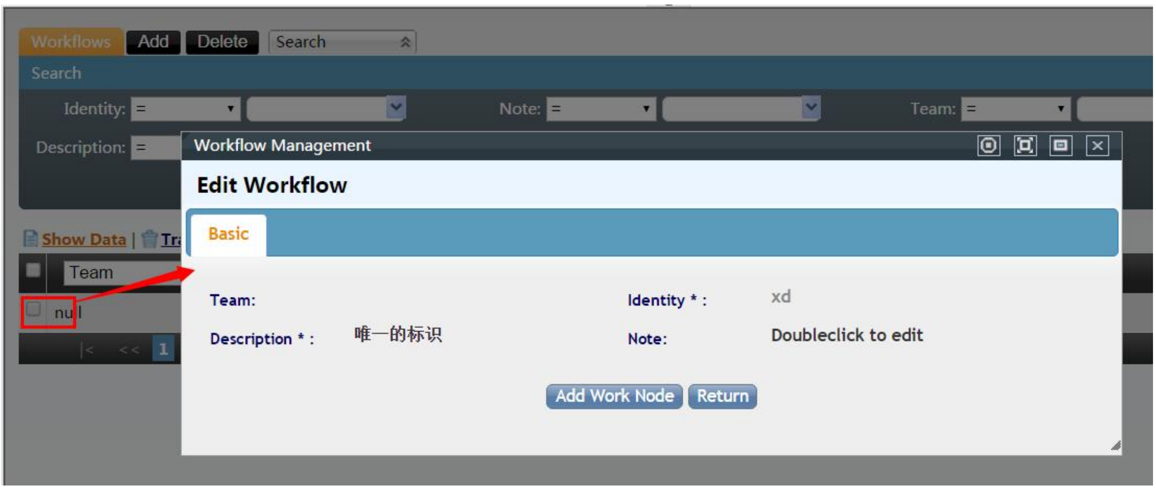
Add



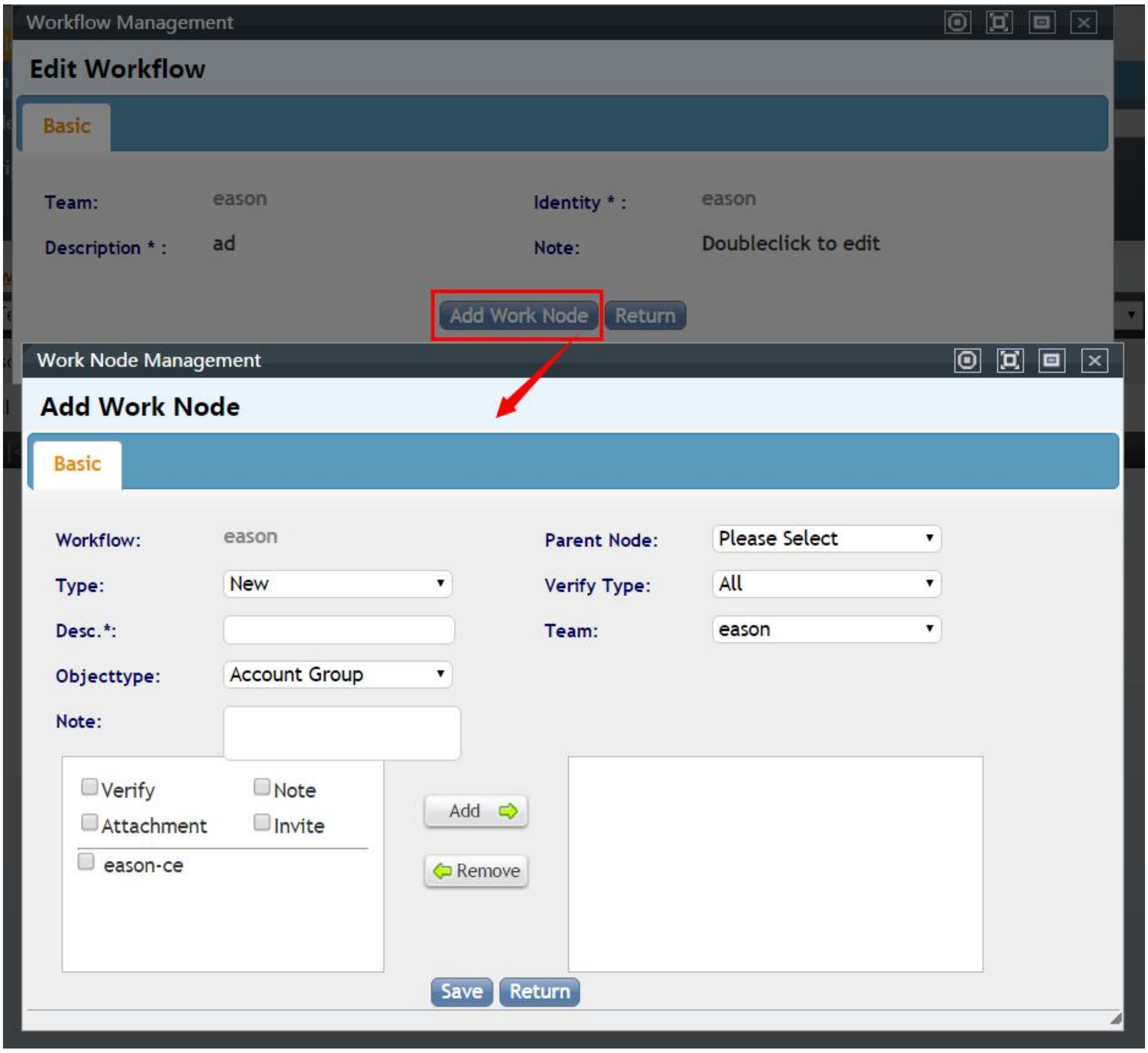
Team: to which team this workflow belongs to;
Identity: The unique identity of this wokflow;
Description: Give a description on this workflow's function;
Note: Give a note to this workflow;
Click **[Save]** when finishing the page, then it will show the newly added data on the page

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.



Add Work Node



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.

Veryfy 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;

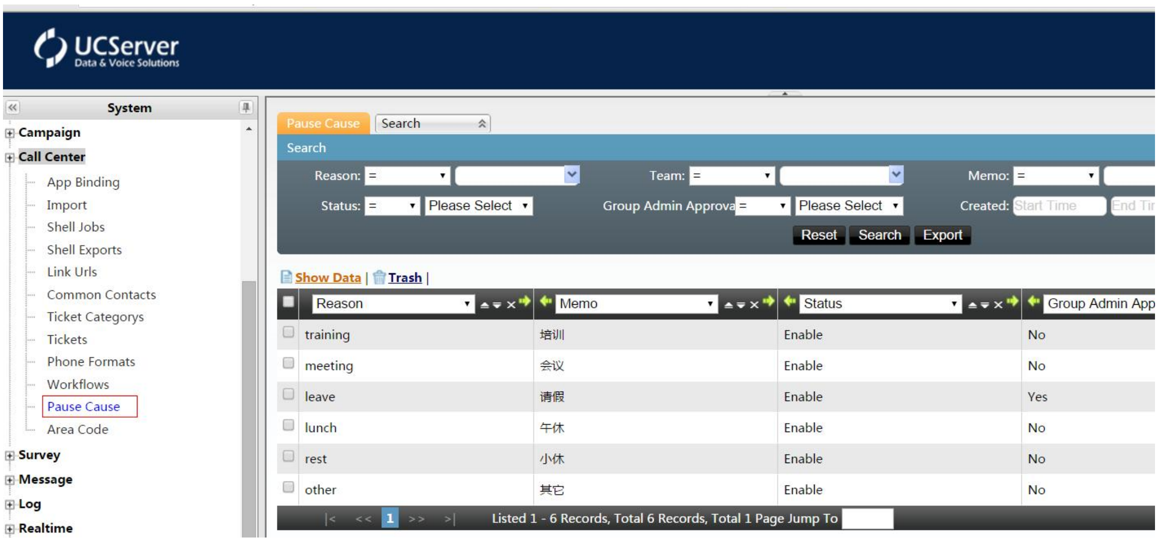
Team: To which team this node belongs to, same as workflow;

Object Type: Who will do the verify and notice.

Note: Give a note to this node;

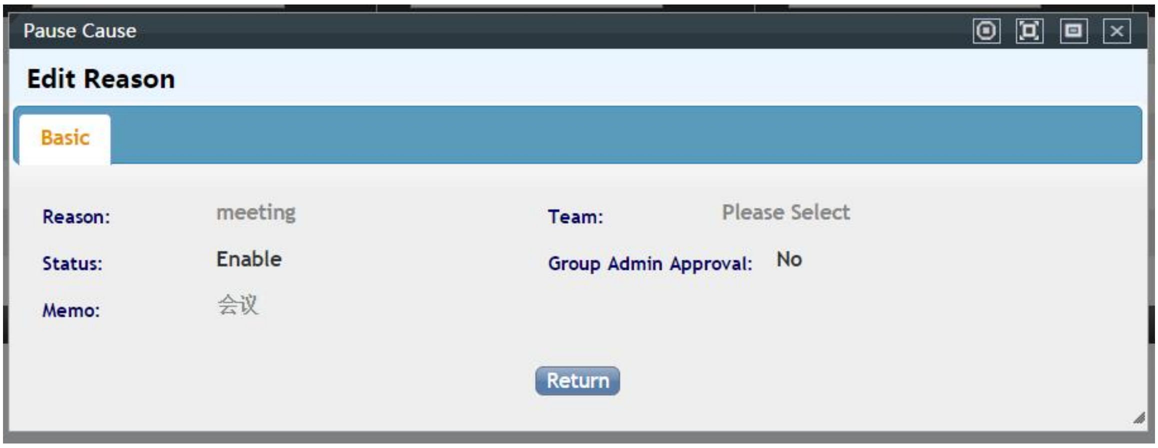
10.11 Pause Cause

On the left menu, please go to[**Call Center**]–> [**Pause Cause**] to open the page.



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



Reason: The reason of pausing.

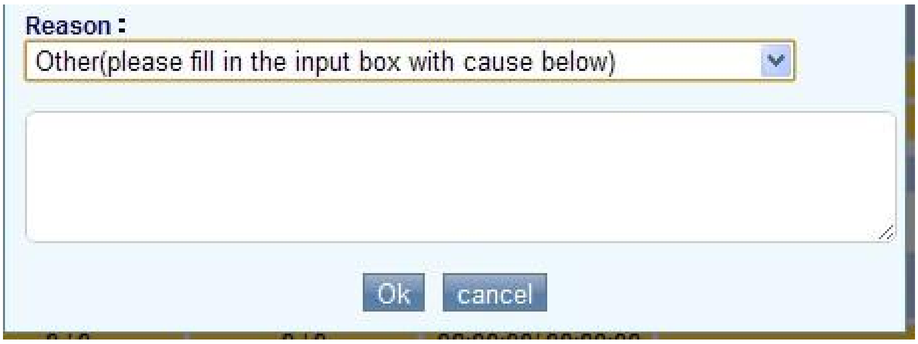
Team: It belongs to all system while a team default，so it can be used no matter agent or groupadmin.

Status: Eable or Disable this reason of pause.

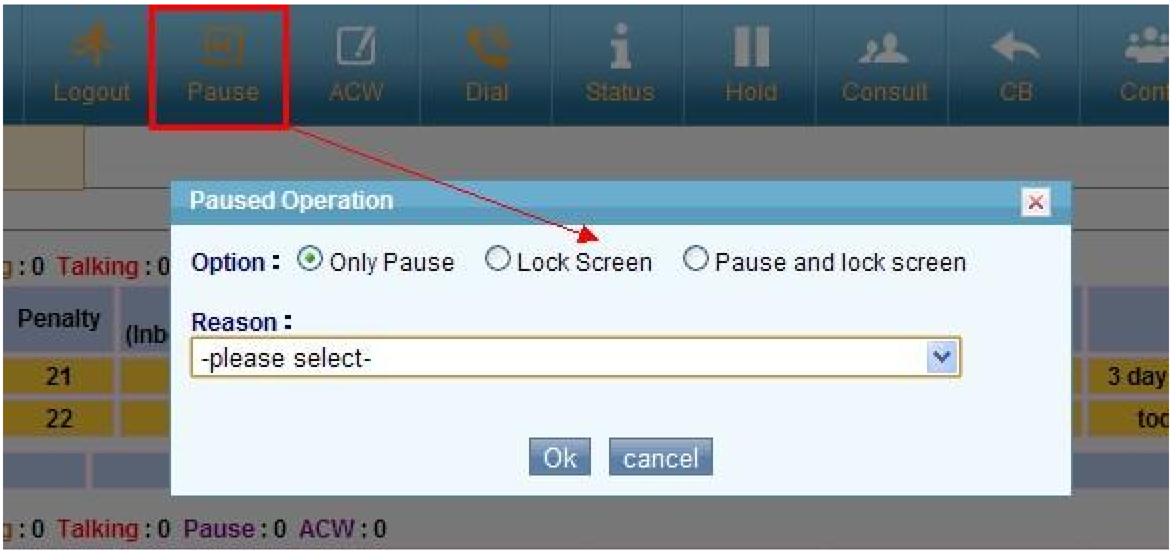
Group Admin Approval: If "yes"，the agent need to enter the group password to verify the administrator's account when he need pause，only pass the verification，the agent can be paused.

Memo: Explain the reason of pause.

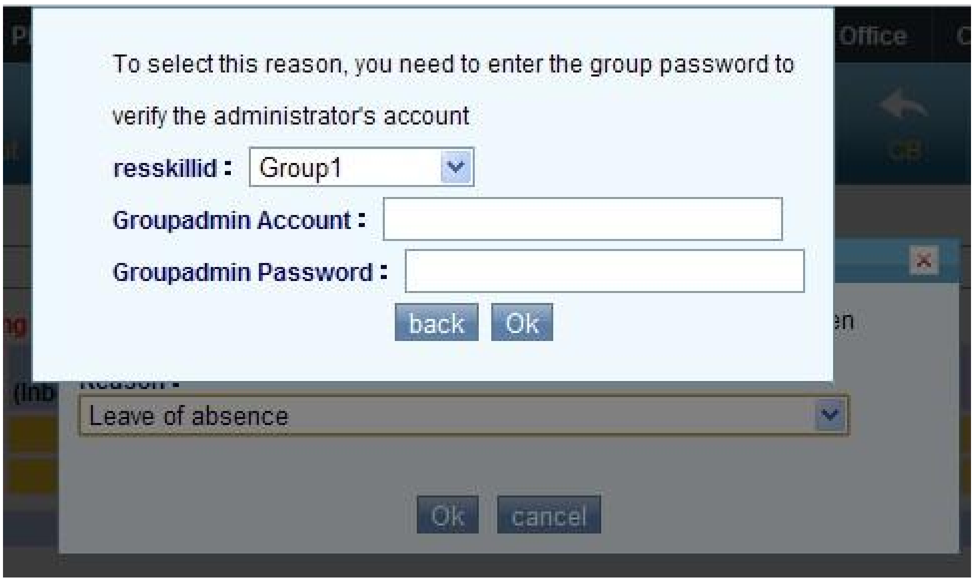
The textarea rectangle will appear，when agent's pause reason choosed to be "Other".



The Agents' working Page



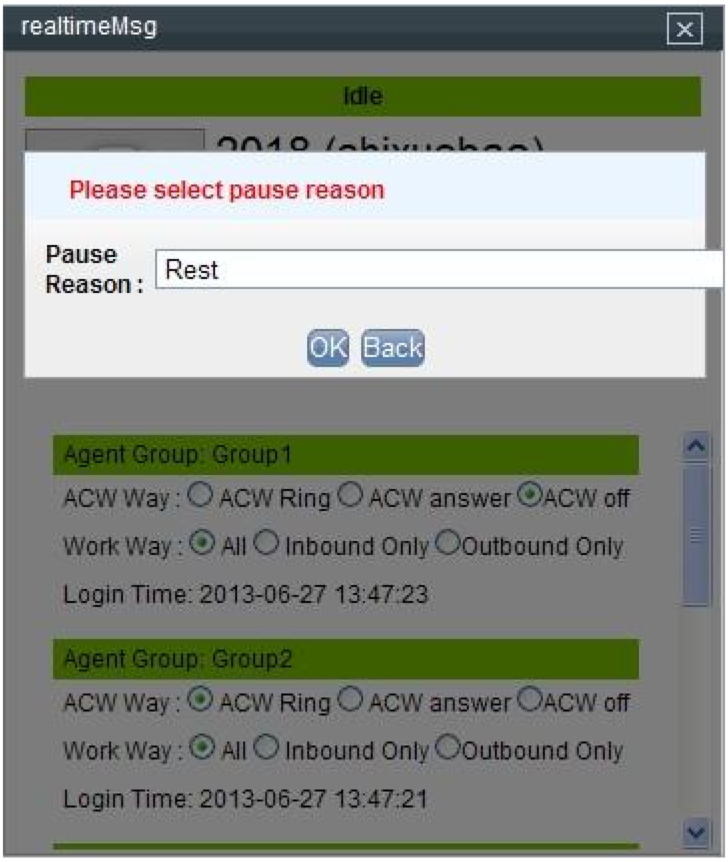
If the agent need to pause，he just click the pause button which on the top of working page，then choose "Option" and "Reason"，if it need verification of group admin，you can see as follows:



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.

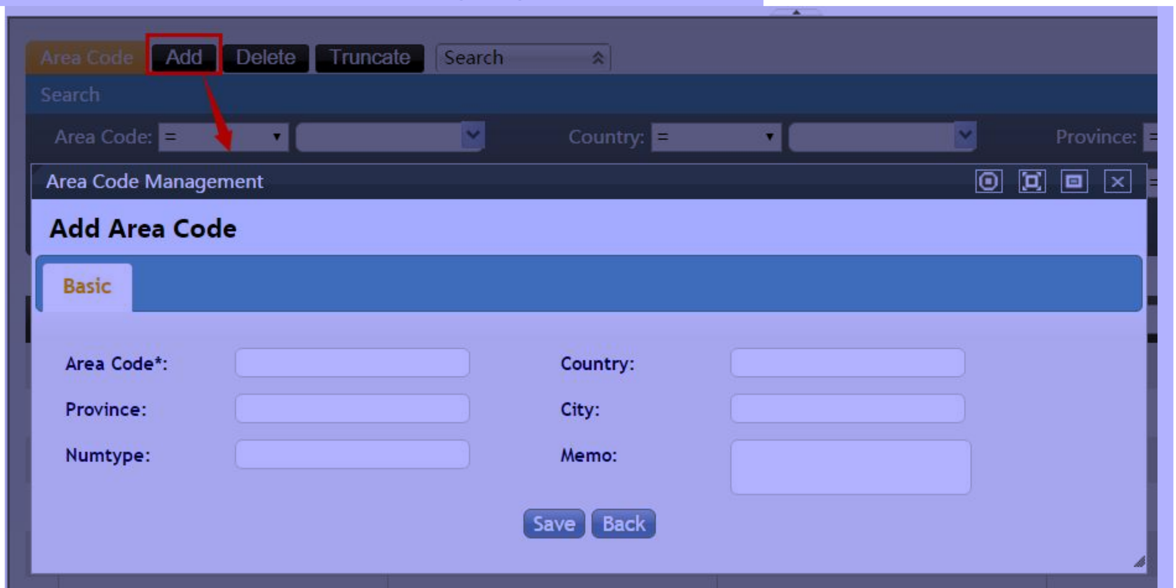


10.12Area Code

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：



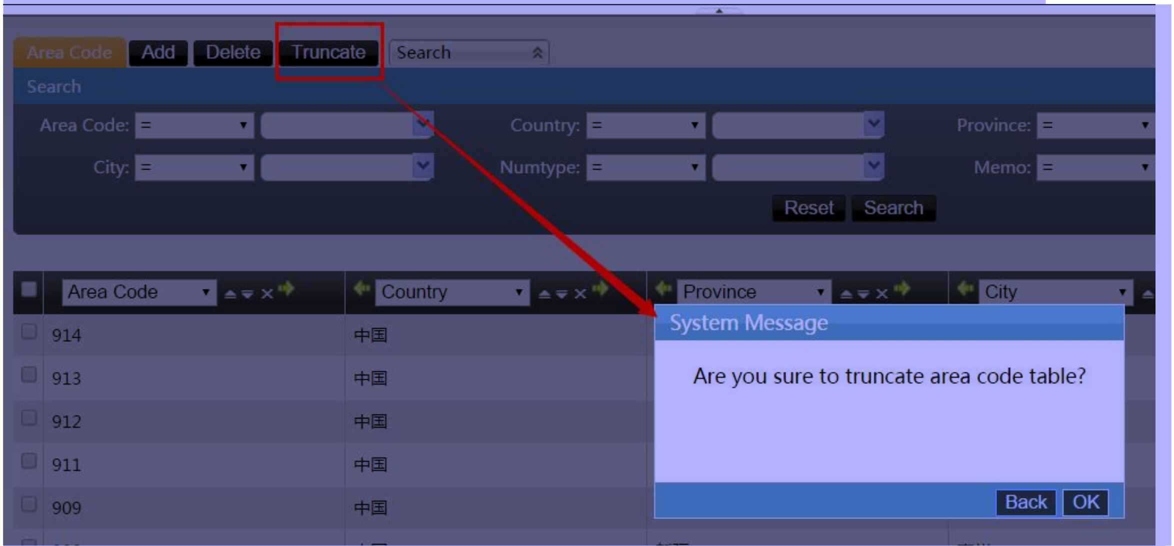
- **Area Code**：The leading digits of the telephone number.
- **Country**：The country of the telephone number.
- **Province**：The province of the telephone number.
- **City**：The city of the telephone number.
- **Numtype**：The type of telephone number,include:Fixed，China Mobile，China Telecom and China 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.

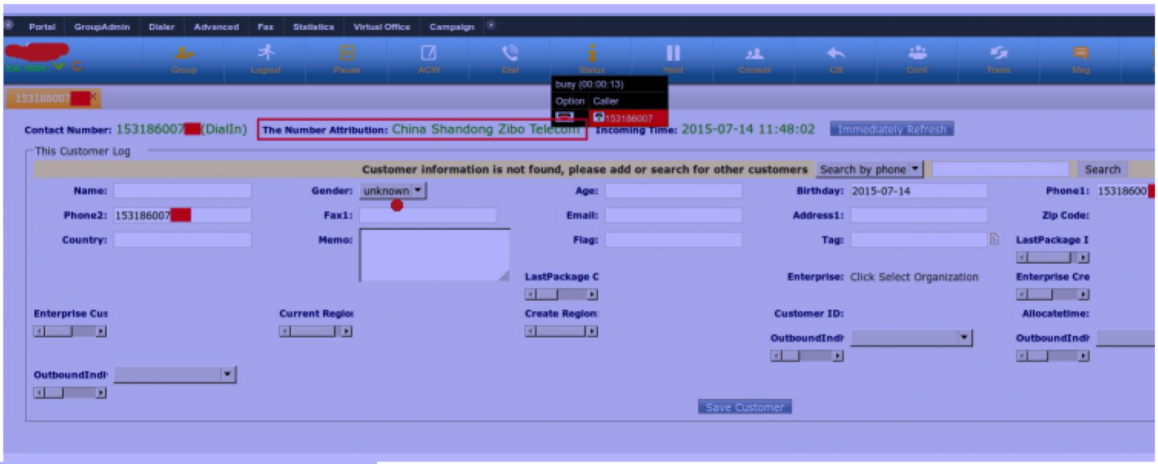


The prompt which execute clear up the table via clicking "OK" empty will pop up after clicked [Truncate] button.

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：

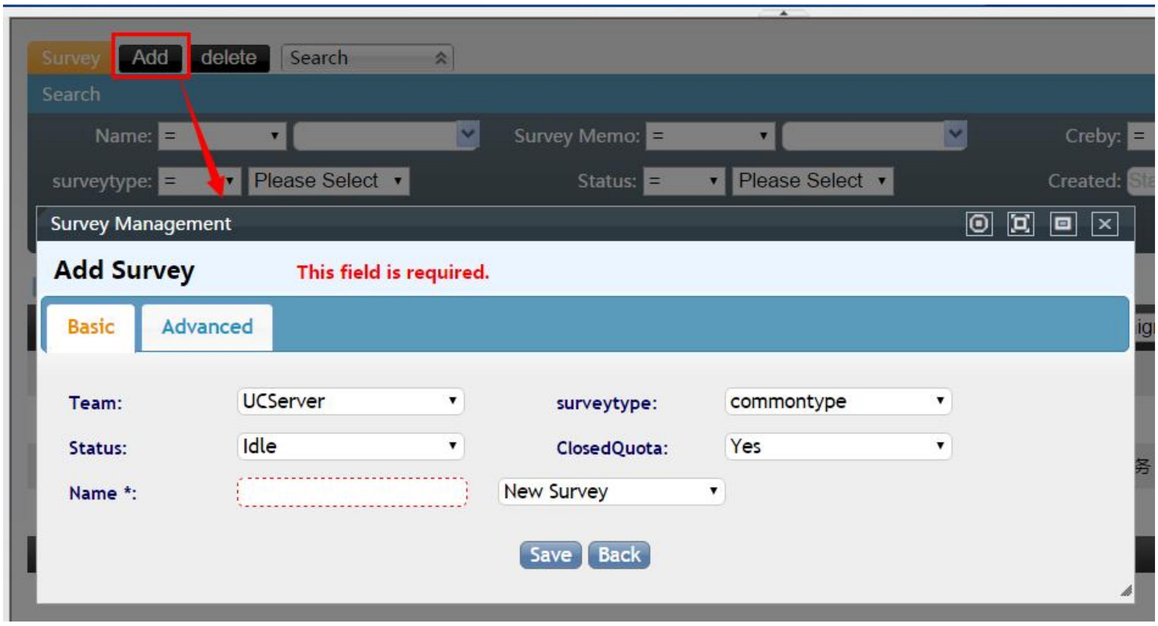
11 Survey

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.

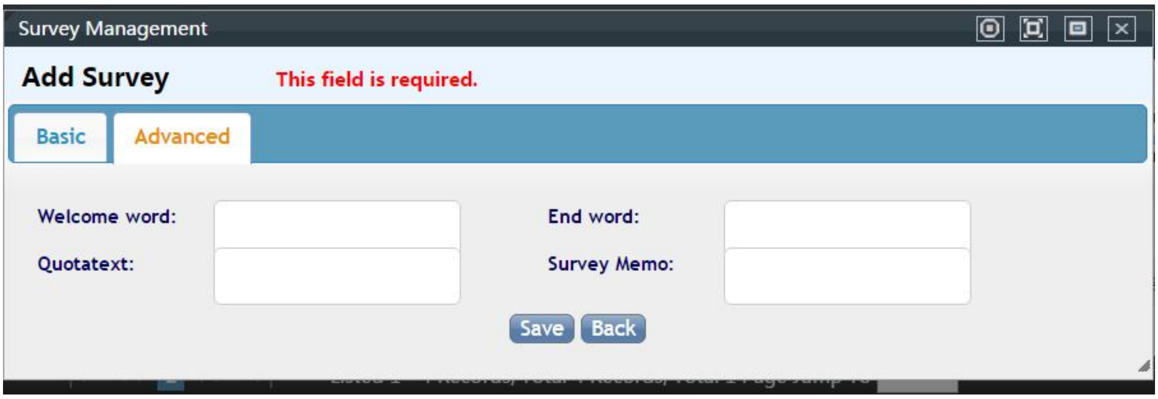
Surveytype：It consists of commontype and voicetype.

Status：The default status is "Idel"，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".

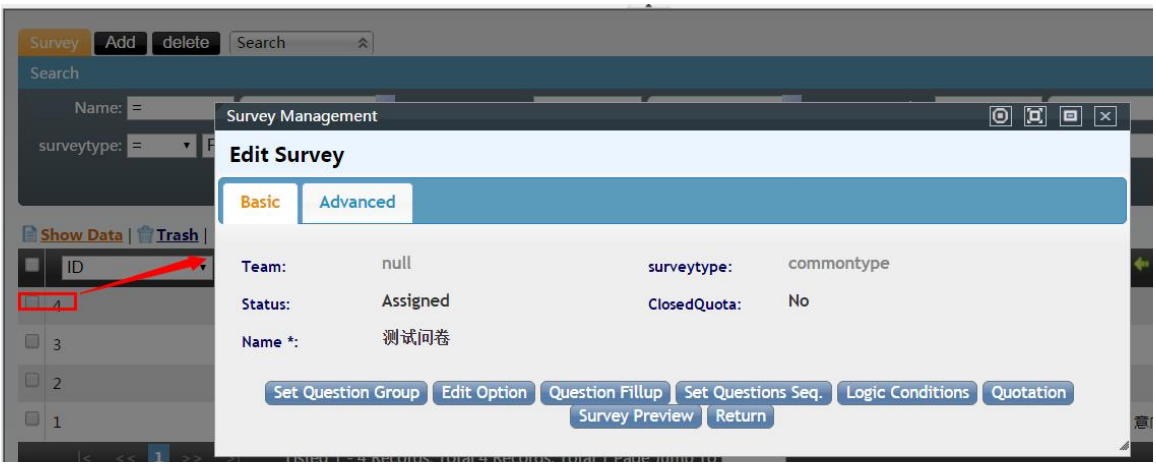
Survey Memo：Describe the purpose of the survey or other details.

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.

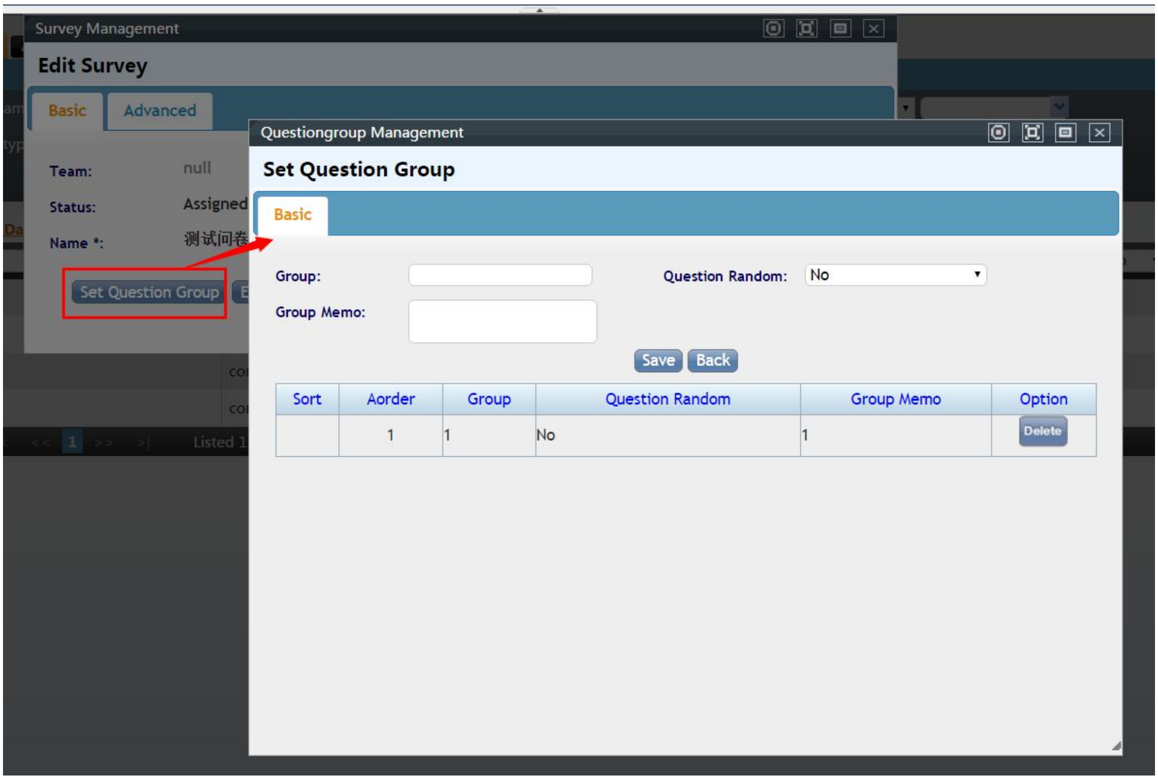
Edit

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：



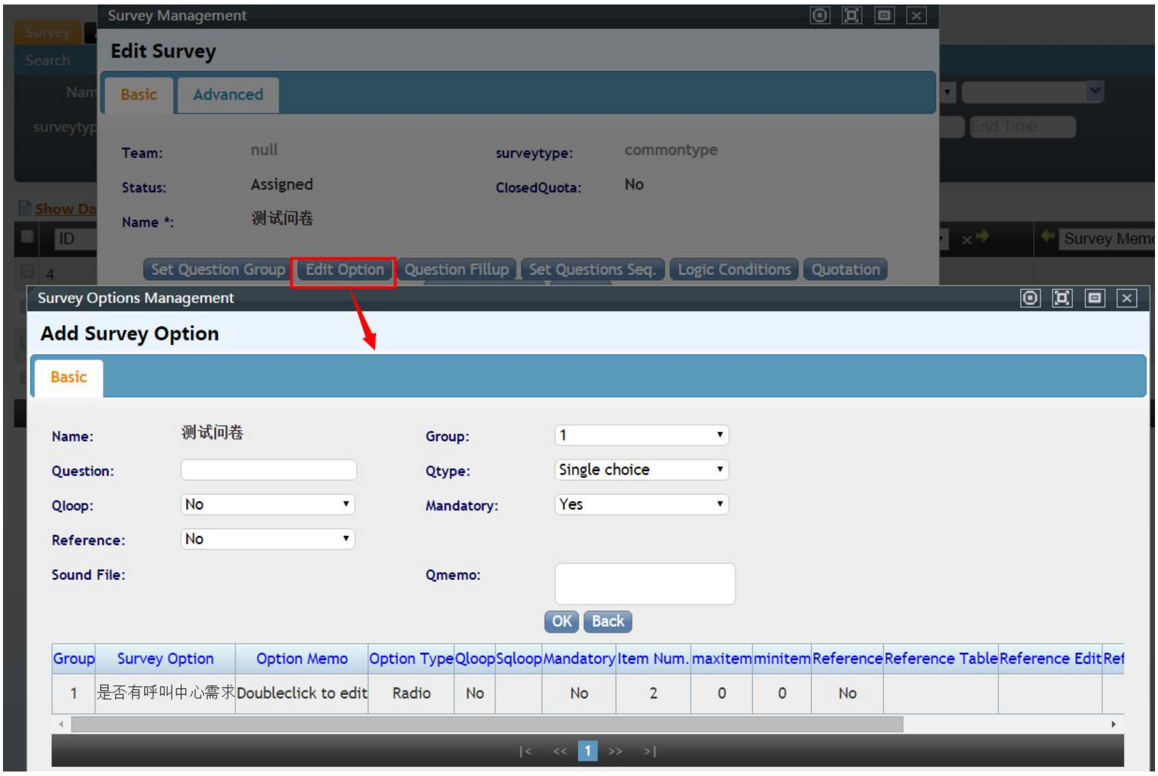
Group：To distinguish the question group different from others.

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



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 custormer 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.

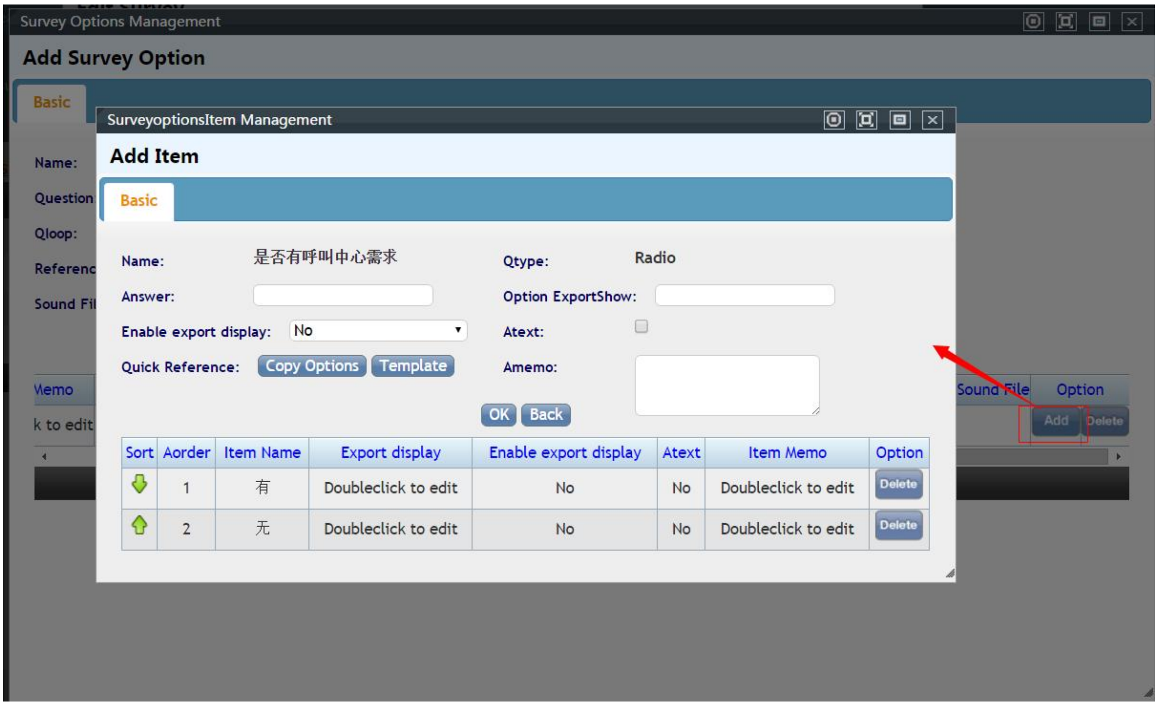
The order of question in accordance with the following norms:

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.



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.

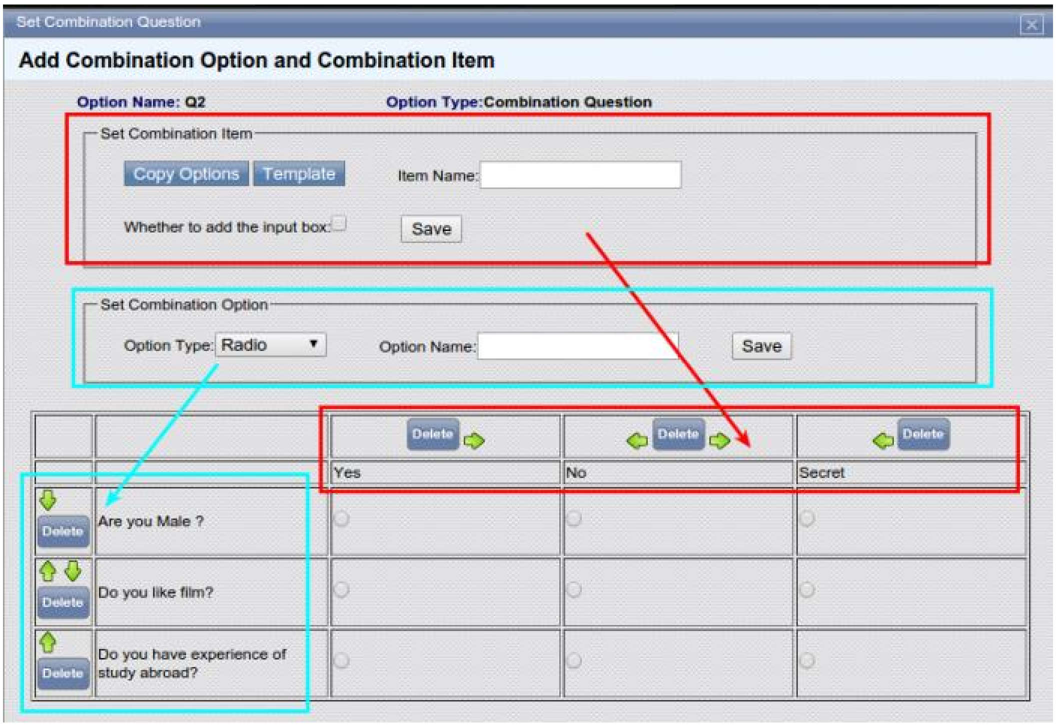
We usually put the frequent items into a template. For example, the gender template: female, male and secret.

> Read more about answer templates, refer to:Answer Templates

Amemo: Additional memo to explian 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 serveral 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.

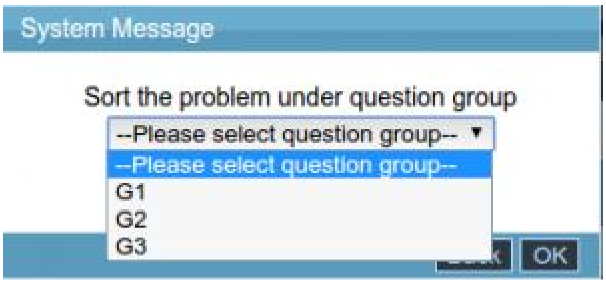
It includes Radio(Single choice) and Checkbox(Multiple choice). At the same time, you can set up "whether to add the input box" to every item behind question.

You can order items and option directly by clicking the direction arrow.

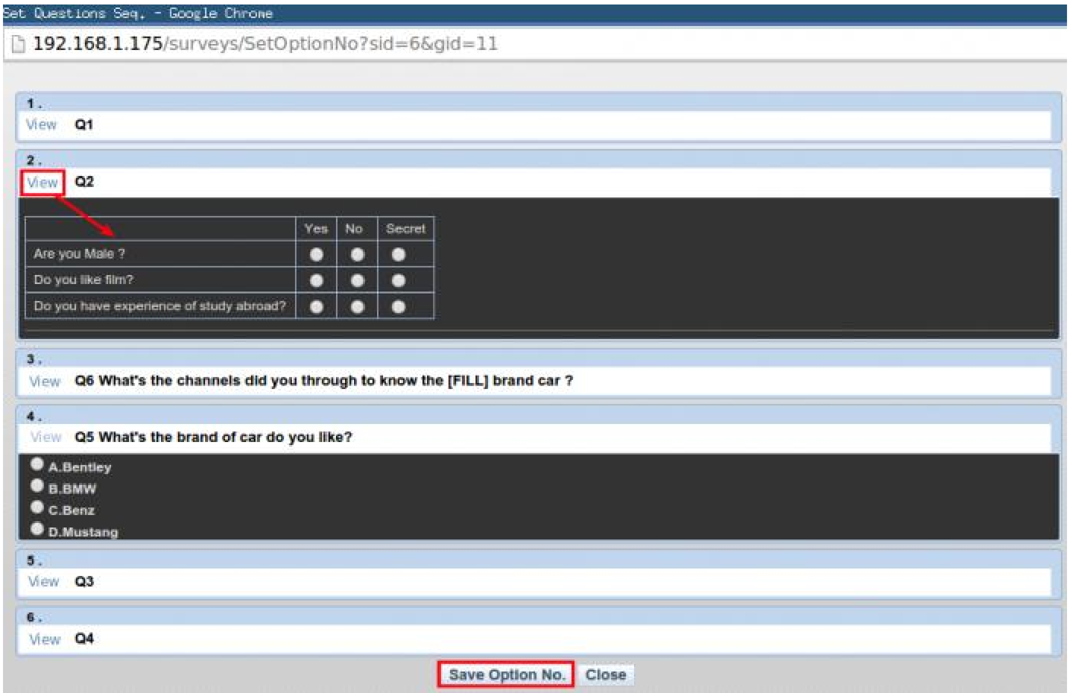
Set Questions Seq.

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:



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:

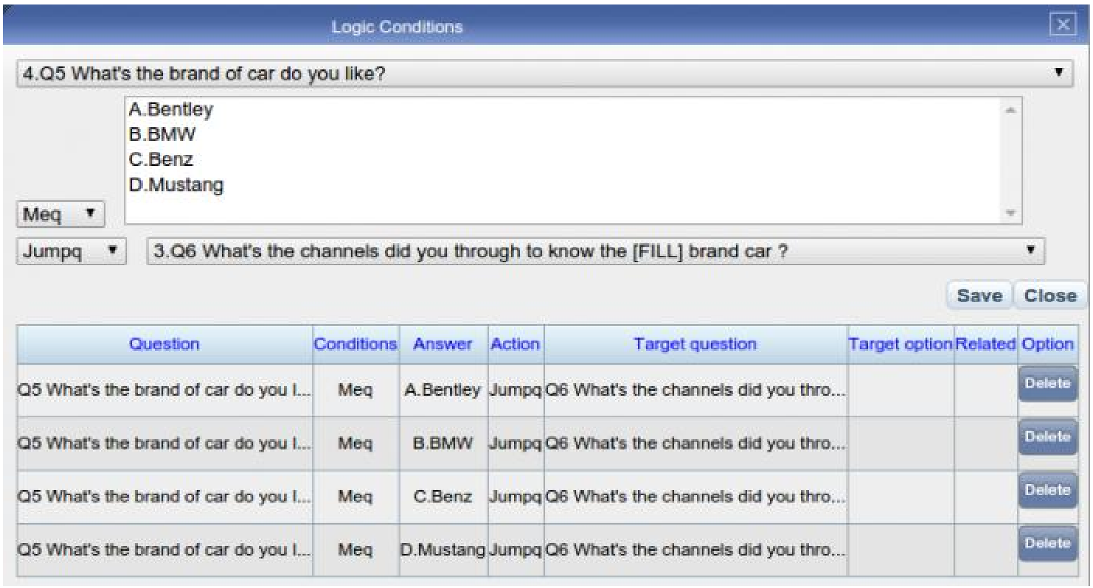
You should confirm the question which need to be filled up, and choose which question's answer to fill the question.

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).



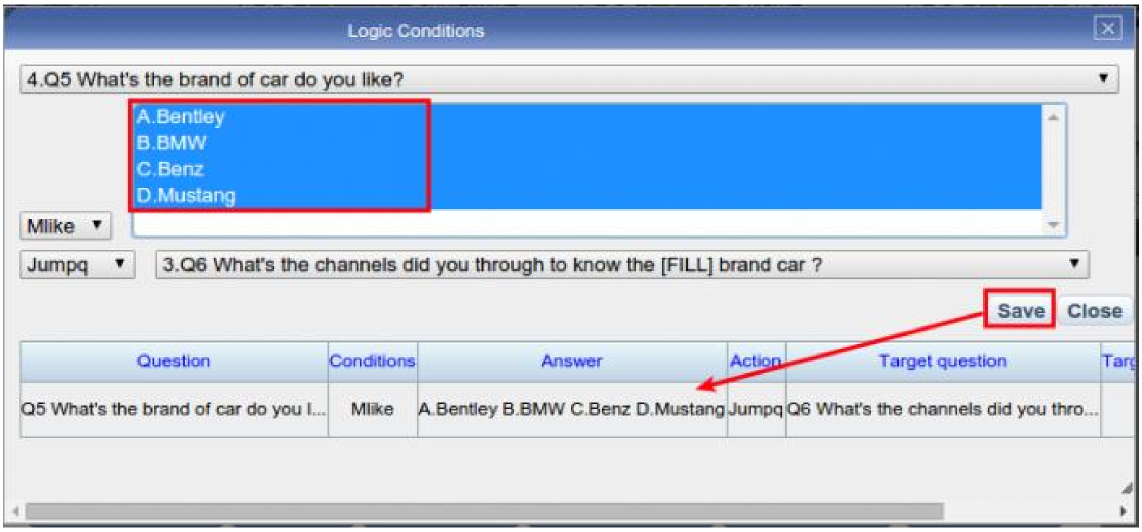
As shown in image above，first confirm which question need execute logic setting.

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 equel to：



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

Survey Preview is used to simulate the process of answering, so administrators should check followings:

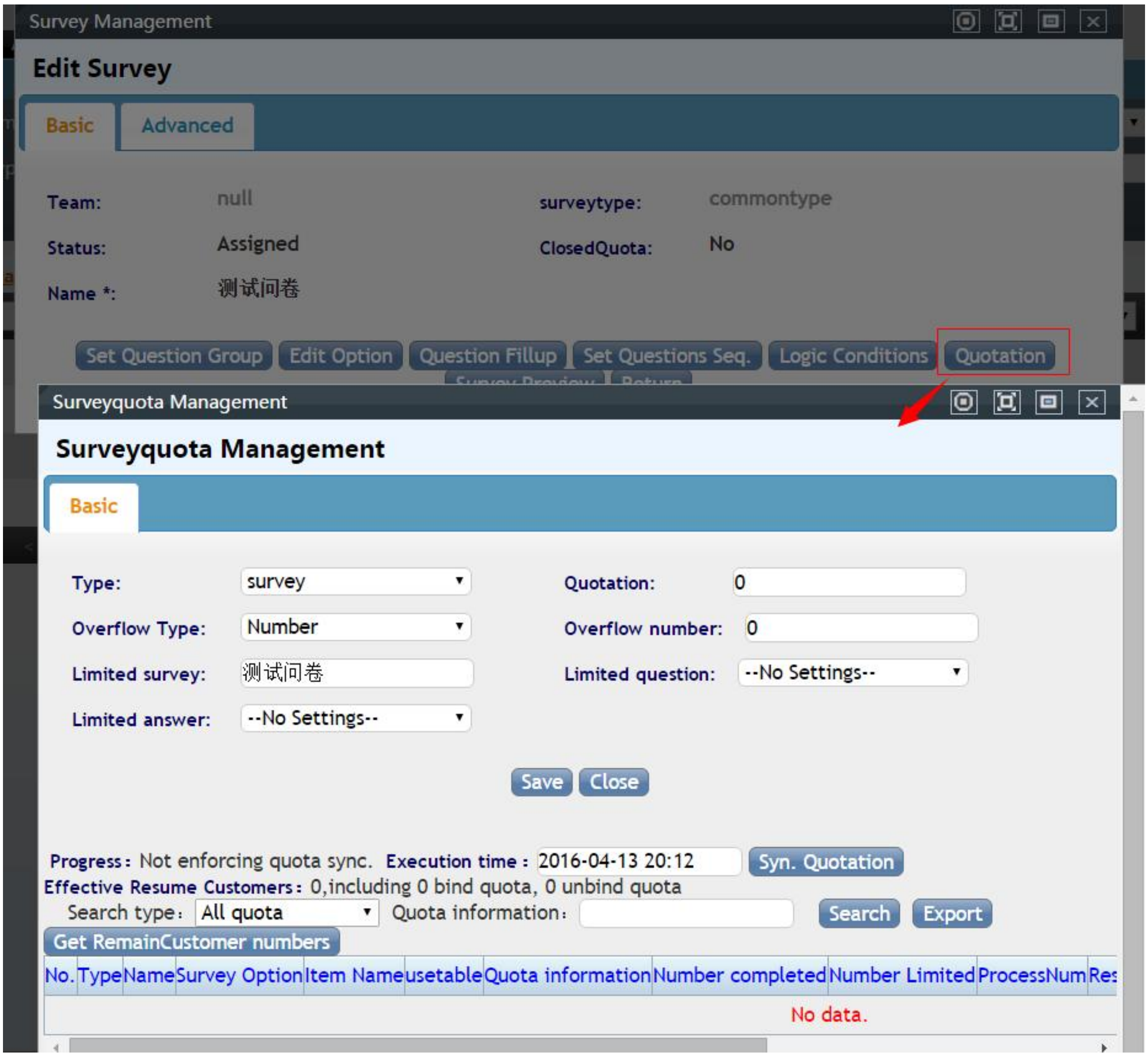
Check the questions and options of survey;

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 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);

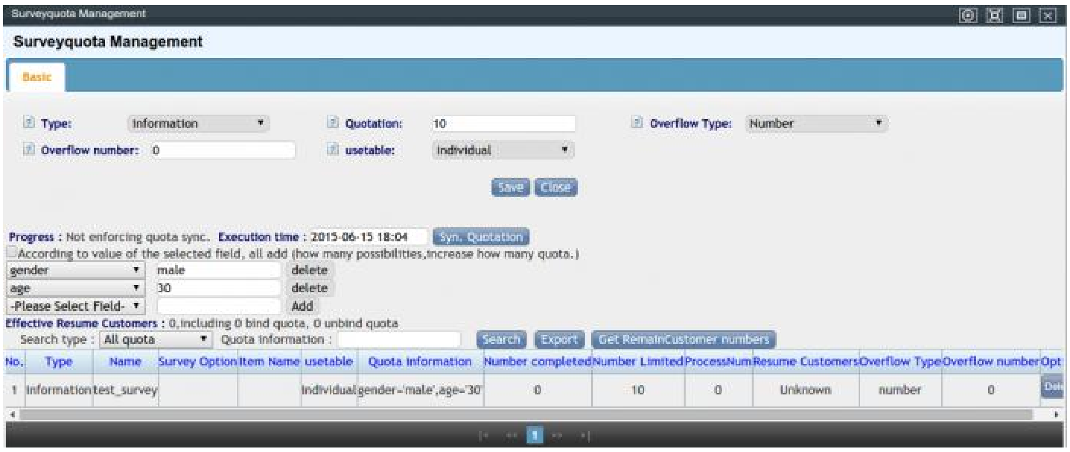
Limited survey:Controled the quota by number of survey(The default type of quota).

Limited question:Controled the quota by number of question.

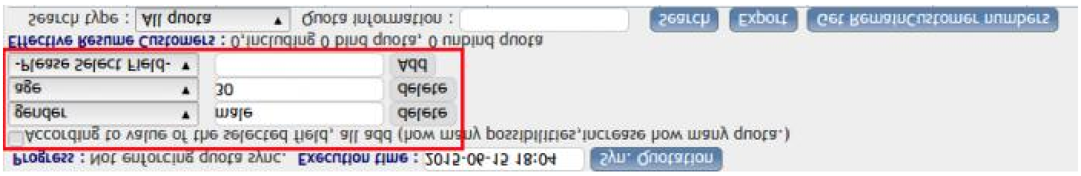
Limited answer:Controled the quota by number of item.

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.

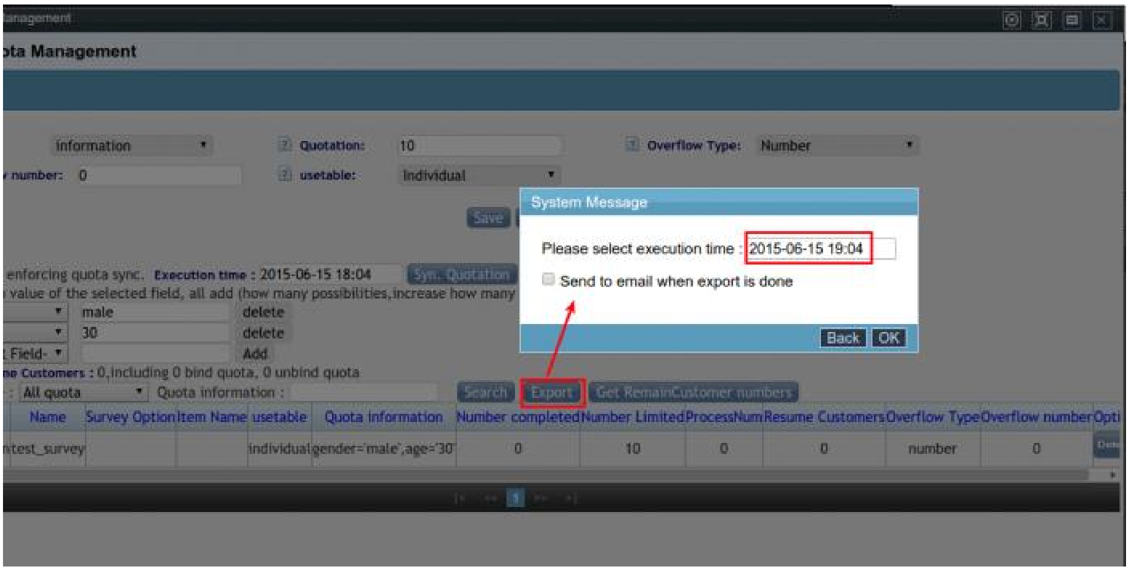
2.You can fill in the value of field manually. For example, "gender is male": it means that you add a quota which the gender is "male".

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.

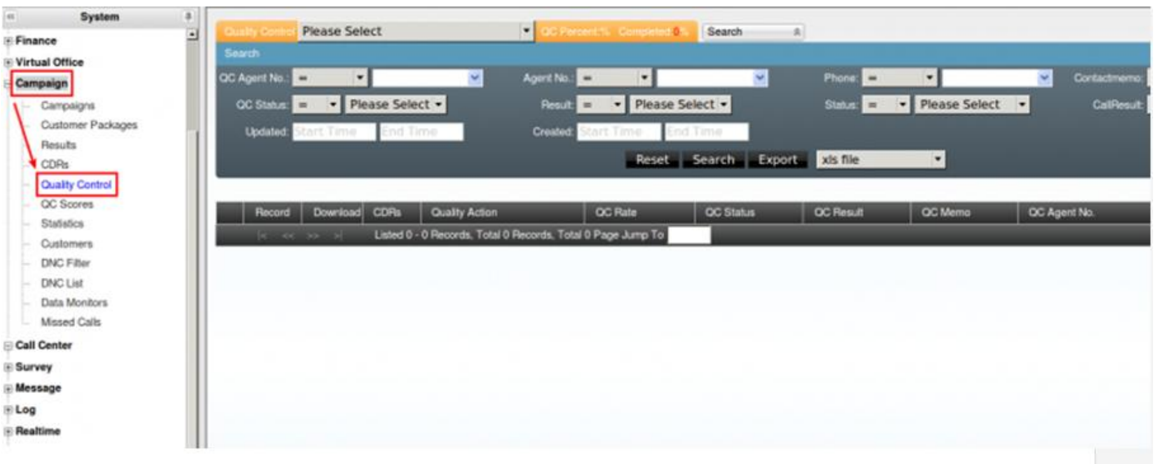
How to answer the survey，please refer to： Agent Work Portal

Statistics of Survey Result

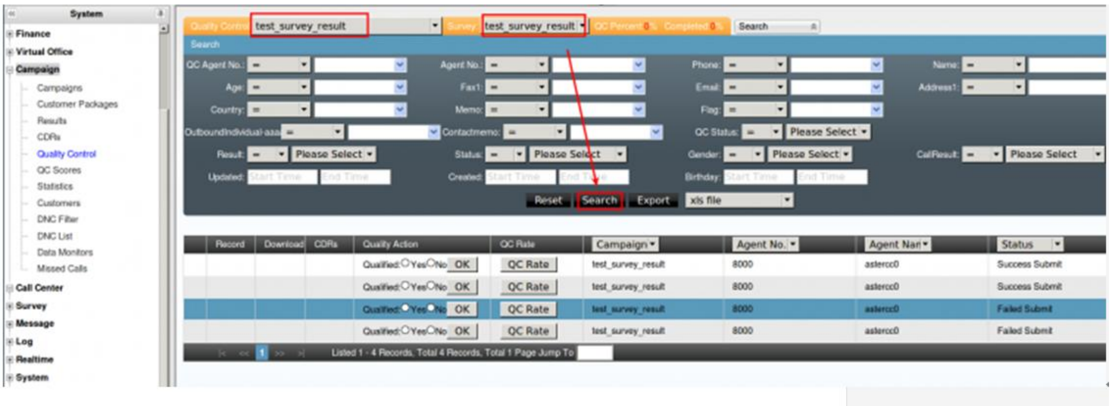
Only the survey result of customer whose status is "Success Submit" or "Failed Submit" can be investigated.

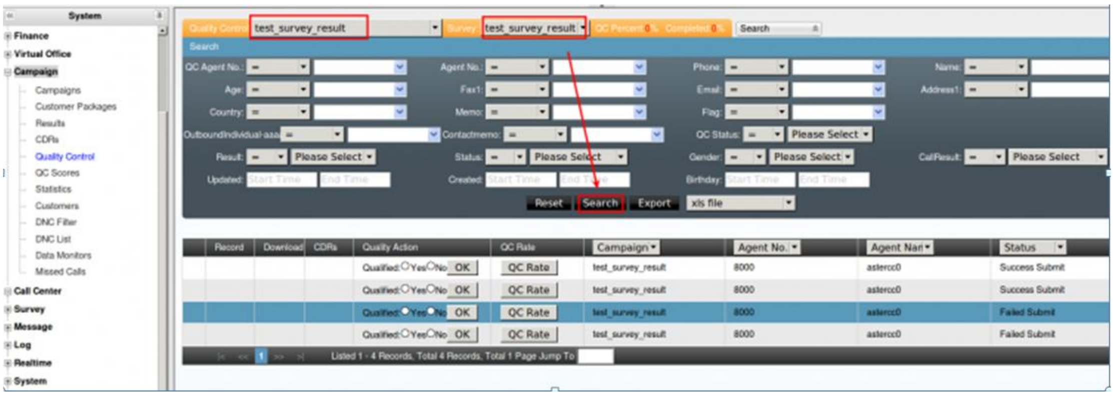
How to View the Detail Result of Survey

On the left menu，click [Campaign]→[Quality Control] button，you can enter the Quality Control page，as follows：



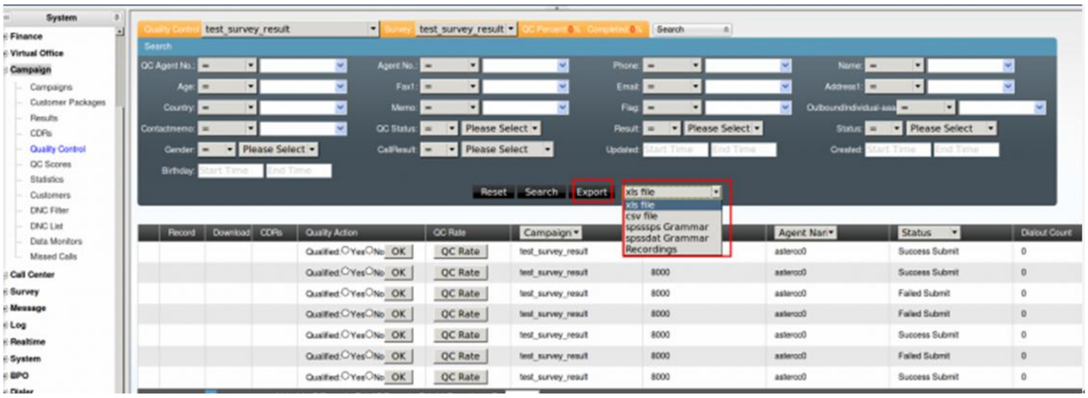
and then, you should select the campaigns and survey correspondingly, you can view the result of survey after clicking the [search] button, as follows:



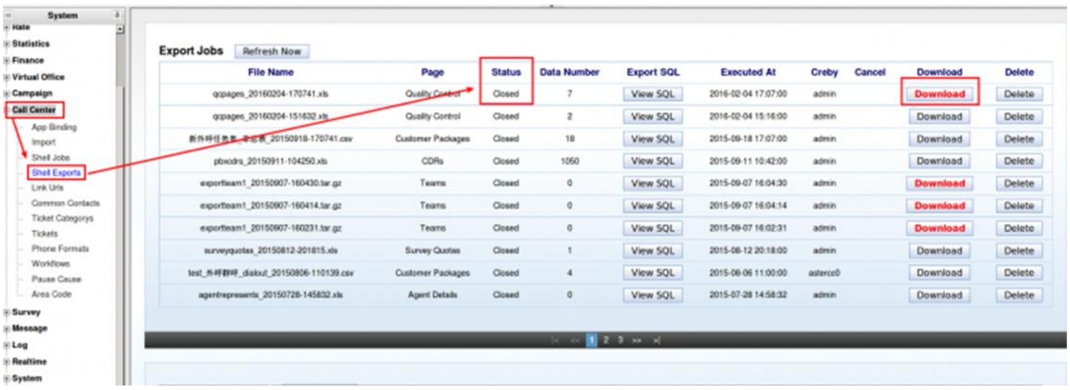


How to Export the Report of Survey Result

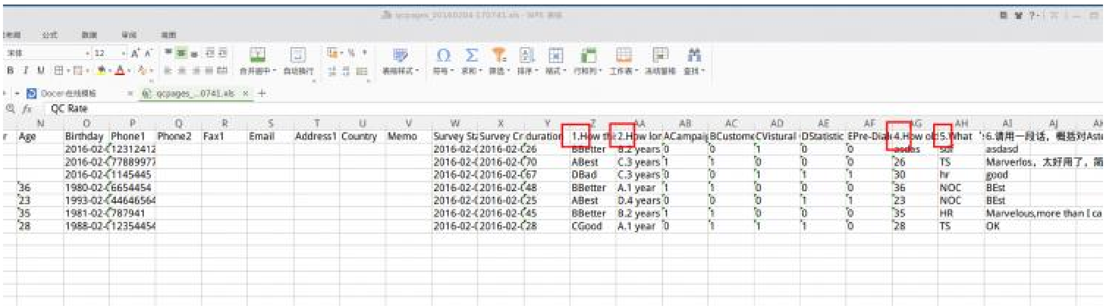
First you should select the type of exporting file, then click the [export] button, and select the execution time.



Click [Call Center]→[Shell Exports], when the Status become "Closed", you can download the statistics file via clicking [Download] button, as follows:



Open the file, you can see the survey result statistics.



11.2 Answer Templates

The purpose of building answer templates is to save time when we add surveys.

We usually use templates as following conditions:

1.Score grade template: 10 points, 9 points, 8 points….;

2.Satisfaction degree template: very good, good, fair, poor, very poor;

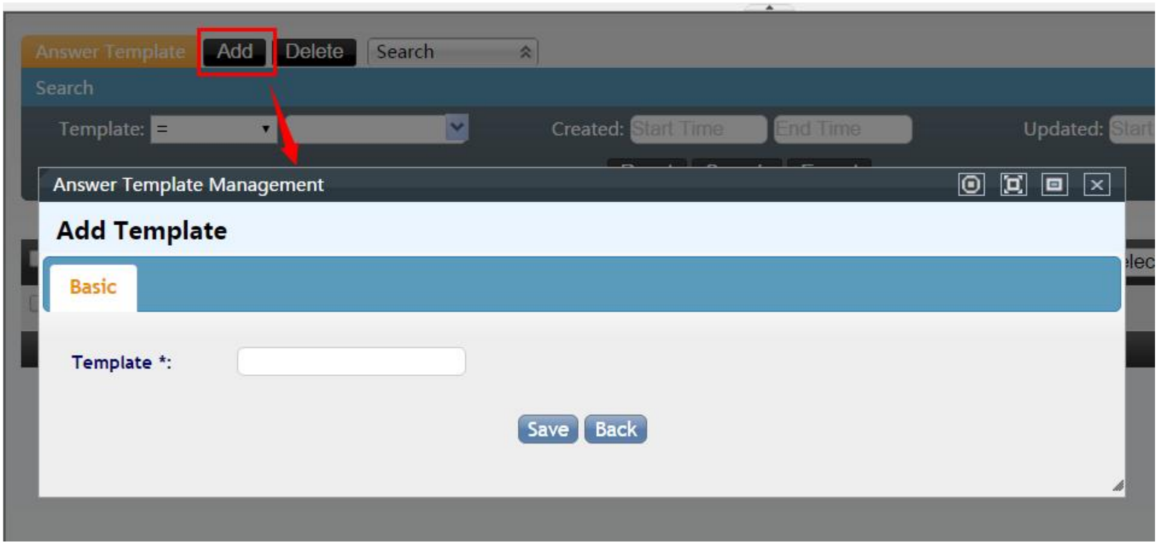
3.Quality level template: very good, good, fair, poor, very poor;

4.Gender template: male, female, unknown, Secret;

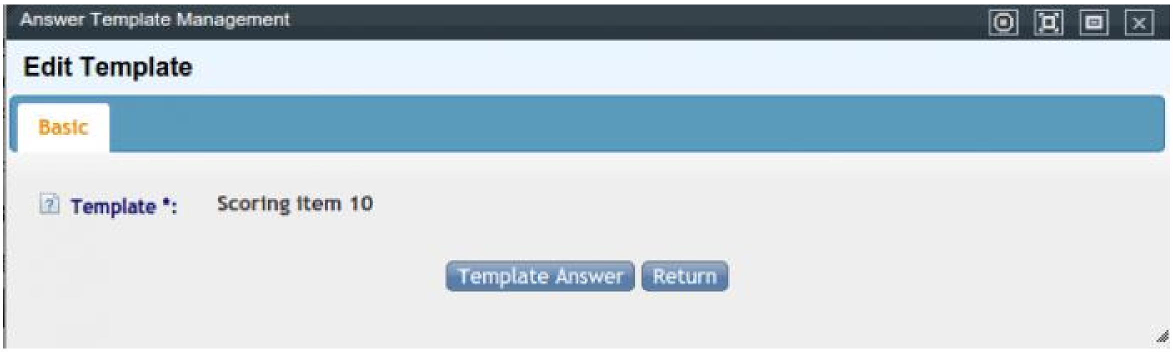
and so on. It is trouble that we need input above contents every time when we add item in [Surveys]→[Surveys]→[Edit Option]→[Add], so we need add template to provided "Quick Reference" when we edit option which analogous to above.

Add Template

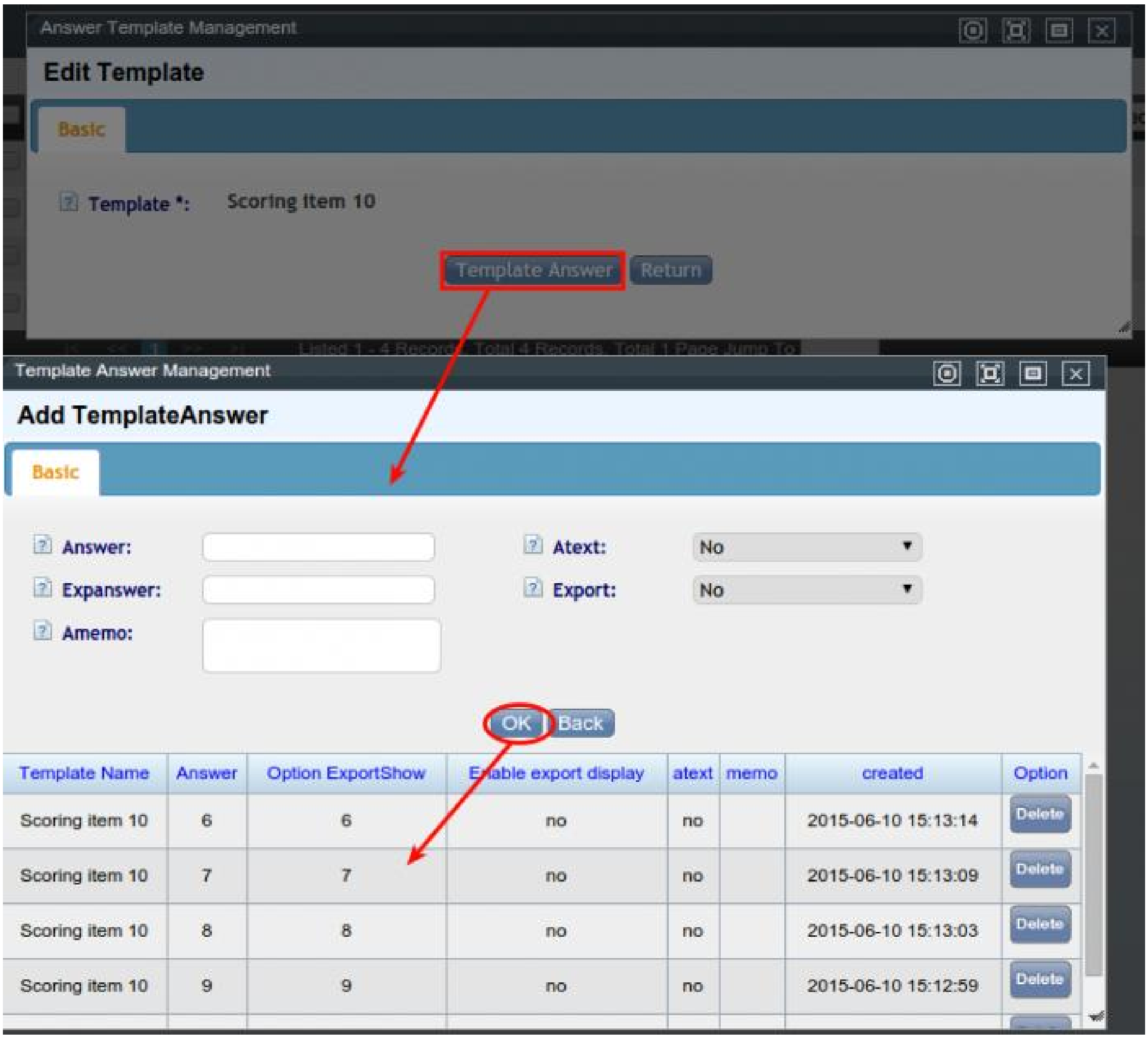
Click [Surveys]→[Answer Templates]→[Add], you can see the adding template page, as following:



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.



Click [Template Answer] button, you can see the "Adding Templateanswer" page, as following:



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(plesea input).

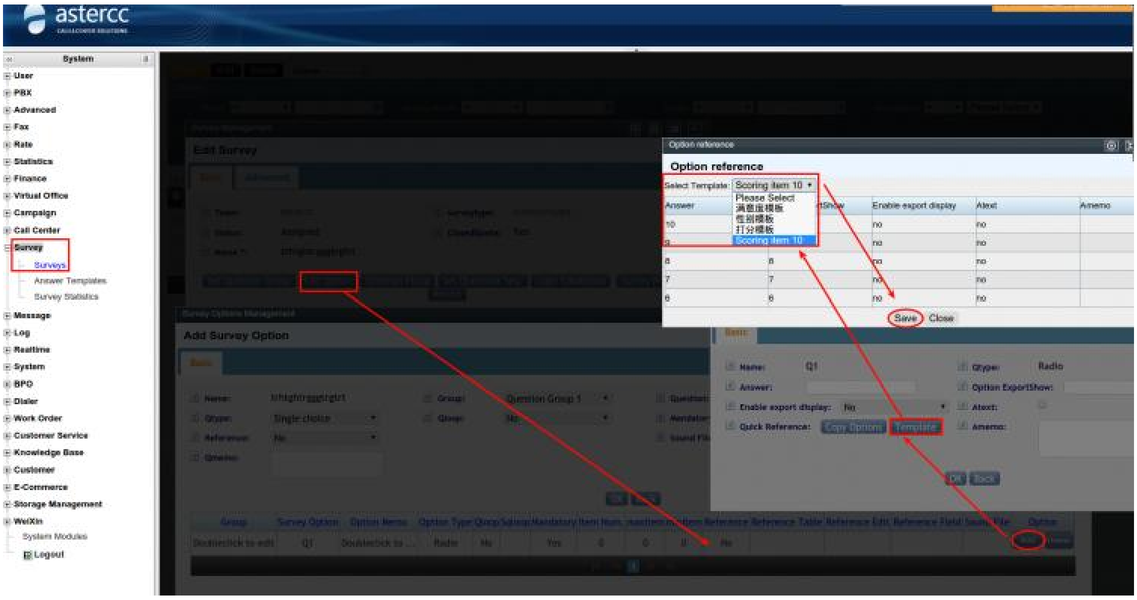
Expanswer: It will replace the answer contents when we export the data(For example: to compute the result of statistics, we can replace answer contents with numbers.

Export: Whether replace answer contents with "Expanswer".

Amemo: Describe the answer to agent.

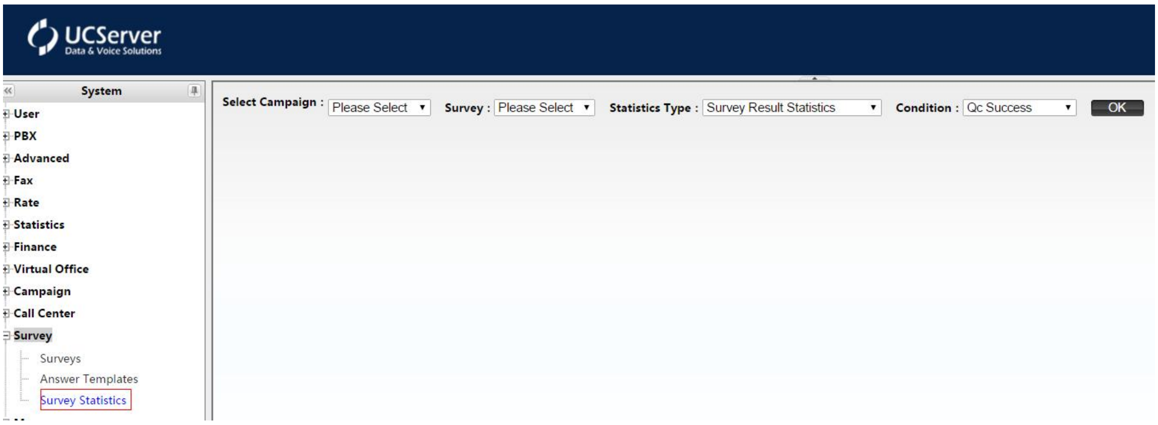
The answer will appear below after clicking [OK] button. Double-click the data when you modify it.

Taking advantage of answer template, we can save time by [Quick Reference]→[Template]



11.3 Survey Statistics

Click [Survey]→[Survey Statistics], as following:



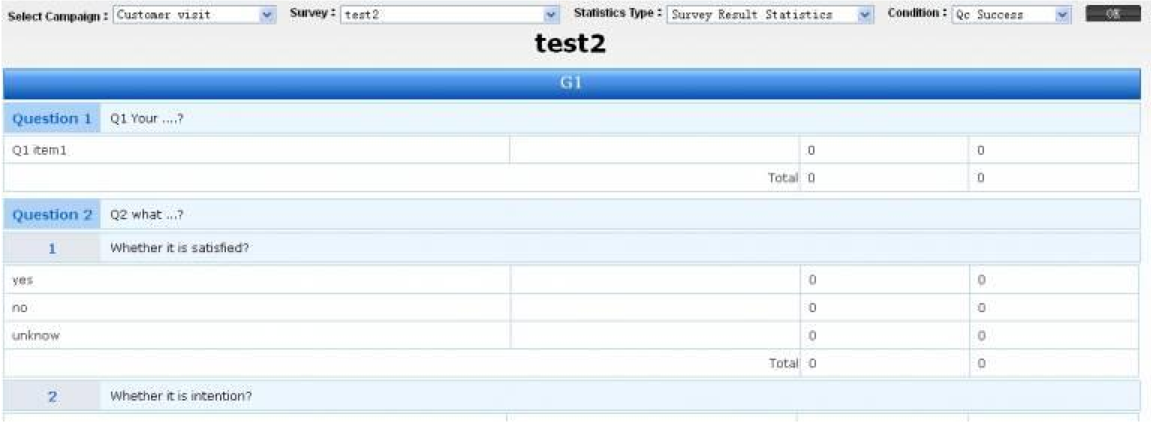
Module Function: Count situation of survey about each campaign, for example: how many people answered, how many people submited successfully, how many times each option is selected, and so on. Statistics vary due to the difference of "Statistics Type".

First, select the campaign, and then select the survey that belongs the campaign.

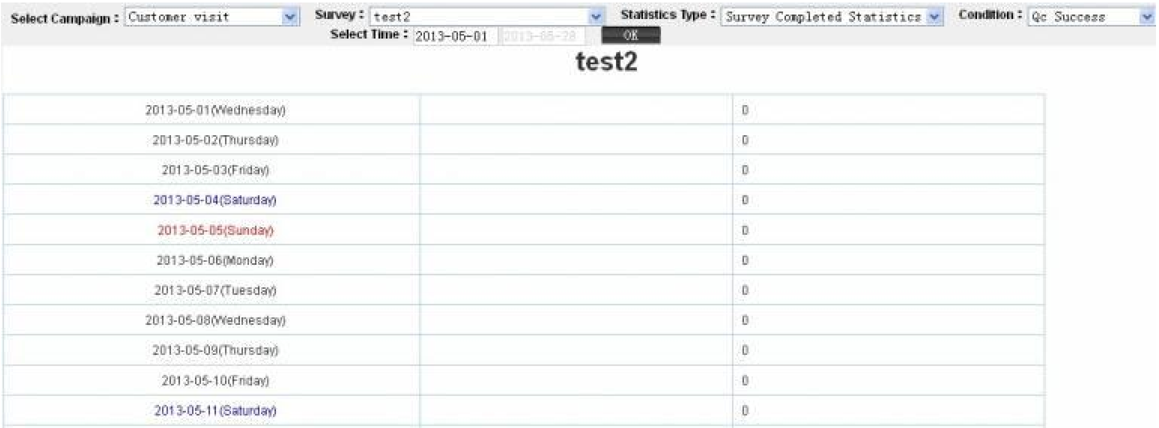
Second, select the statistics type, include "Survey Result Statistics(count the number and the proportion of each question and each option)" and "Survey Completed Statistics(Statistics the number of survey be made per day within a certain time)".

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



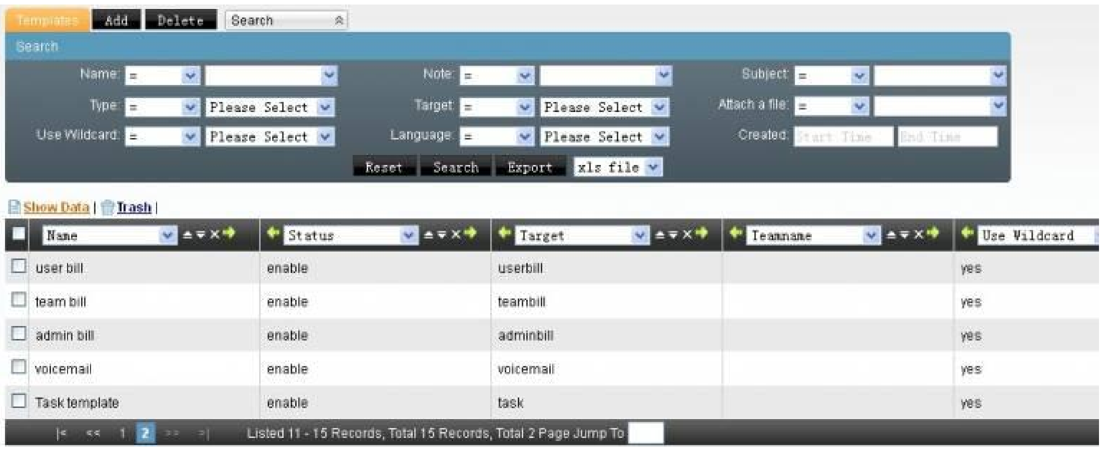
Survey Completed Statistics



12 Message

12.1 Templates

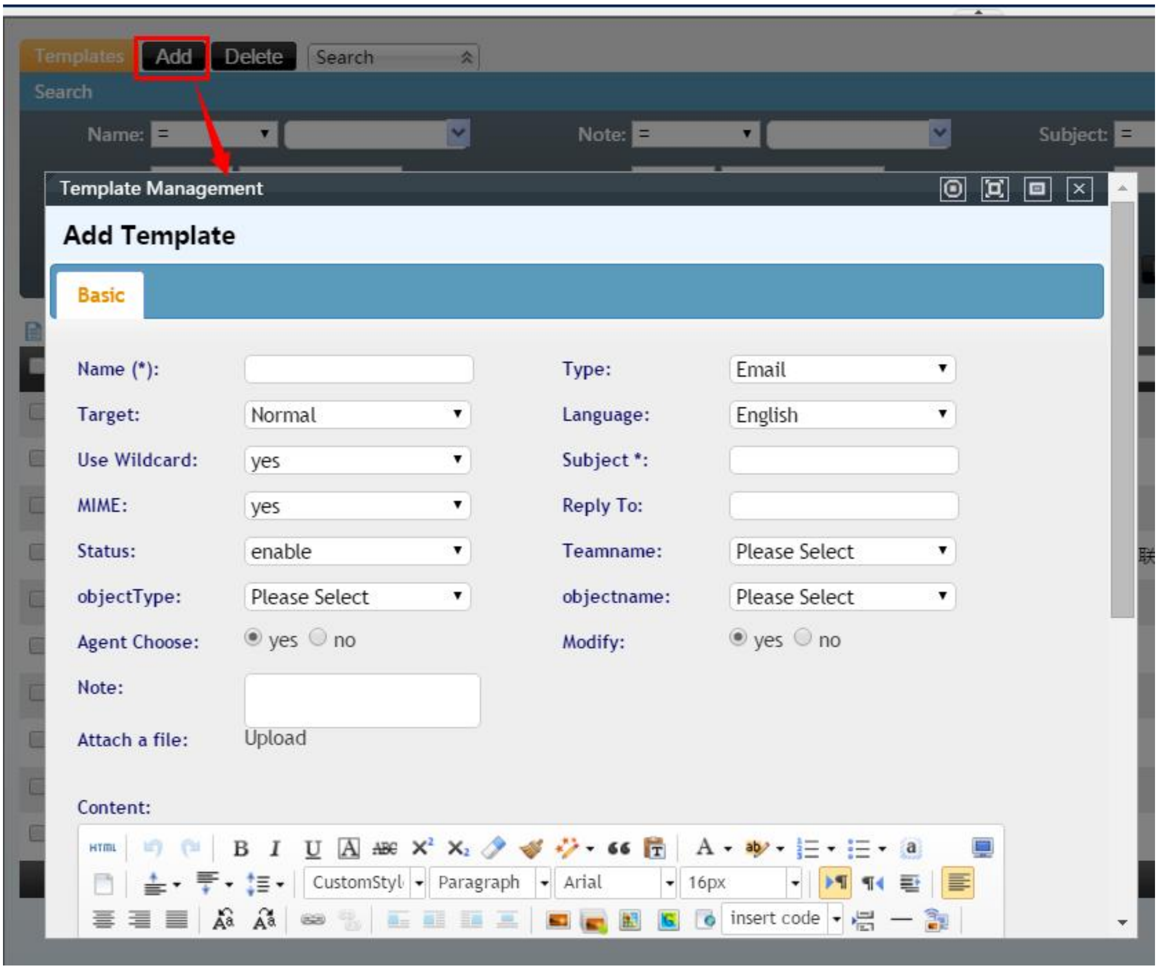
On the left menu, please go to[**Message**]–> [**Templates**] to open the page.



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 eficiency.

Some templates are preset by the system as the service notification. You can modify their contents and layout.

Add



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 redifine 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.

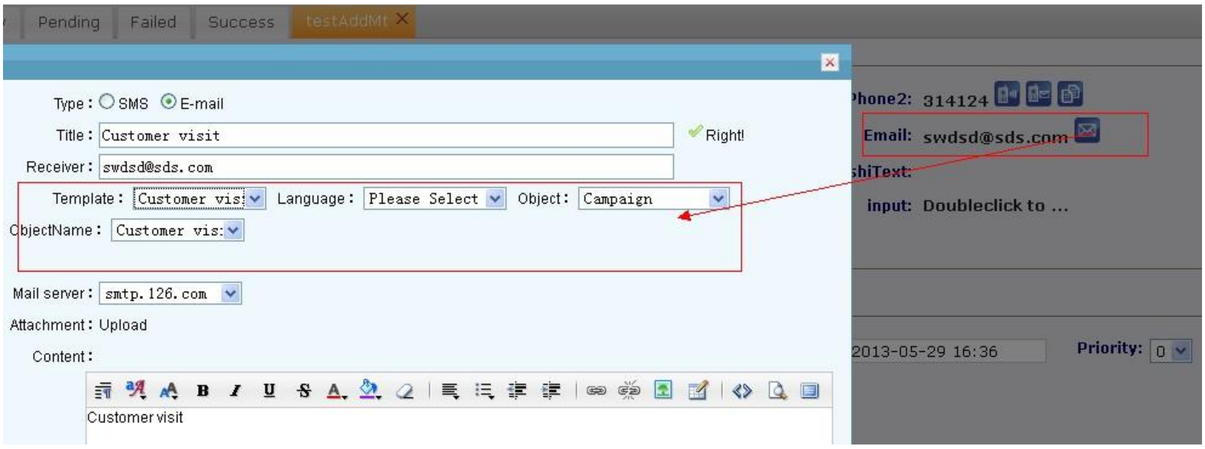
MIME: for email template. Please choose "yes" (the templates are html), to identity the email contains more than words.

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 splited 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.

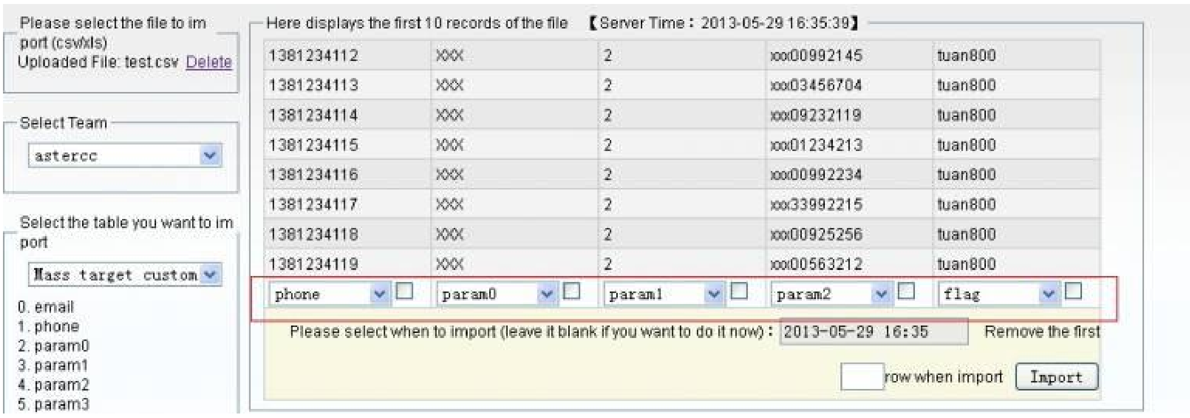
Variables

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.

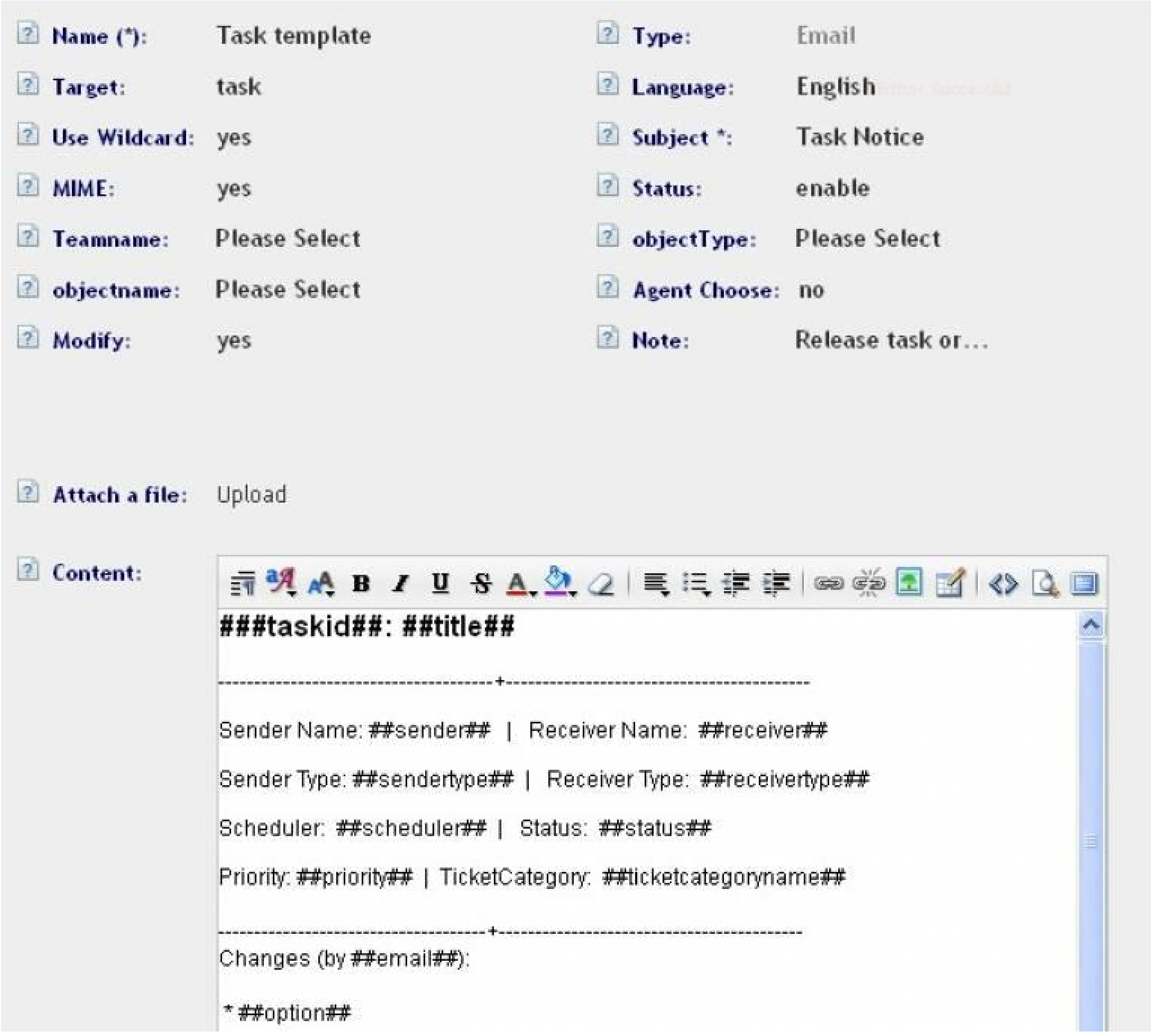


What parameters are provided by the system? What do they mean?

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



##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 ofthe receiver

##status##: the status of the task

##scheduler##: the predcted start time of the task;

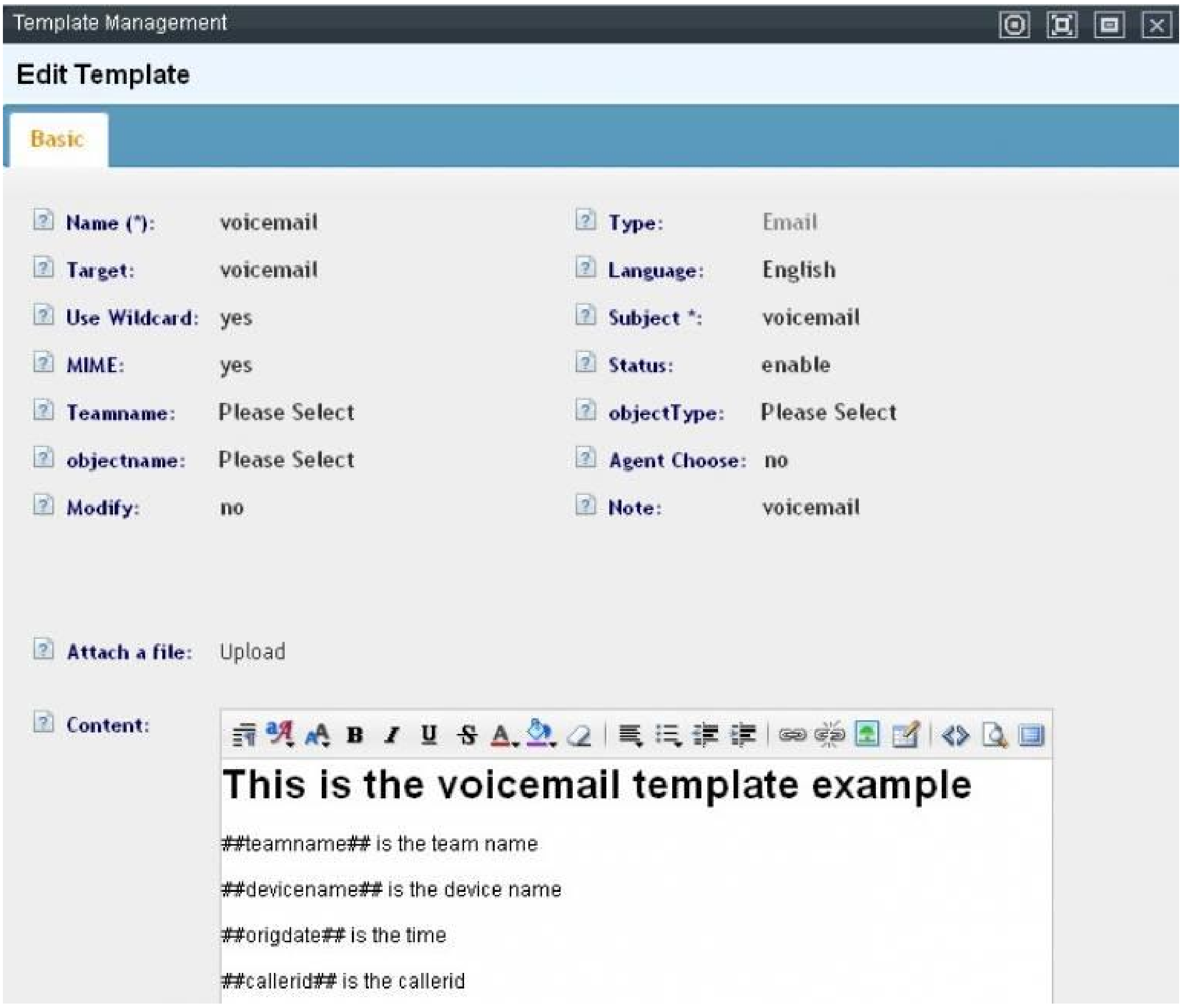
##priority##: the priority level of the task

##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)



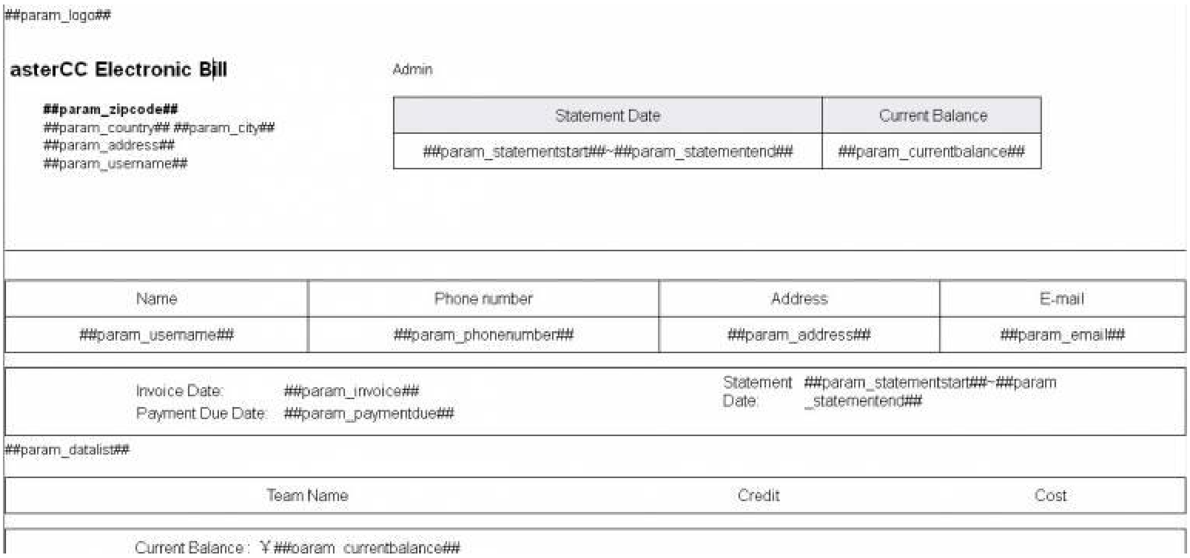
##teamname##：team name

##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



##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.

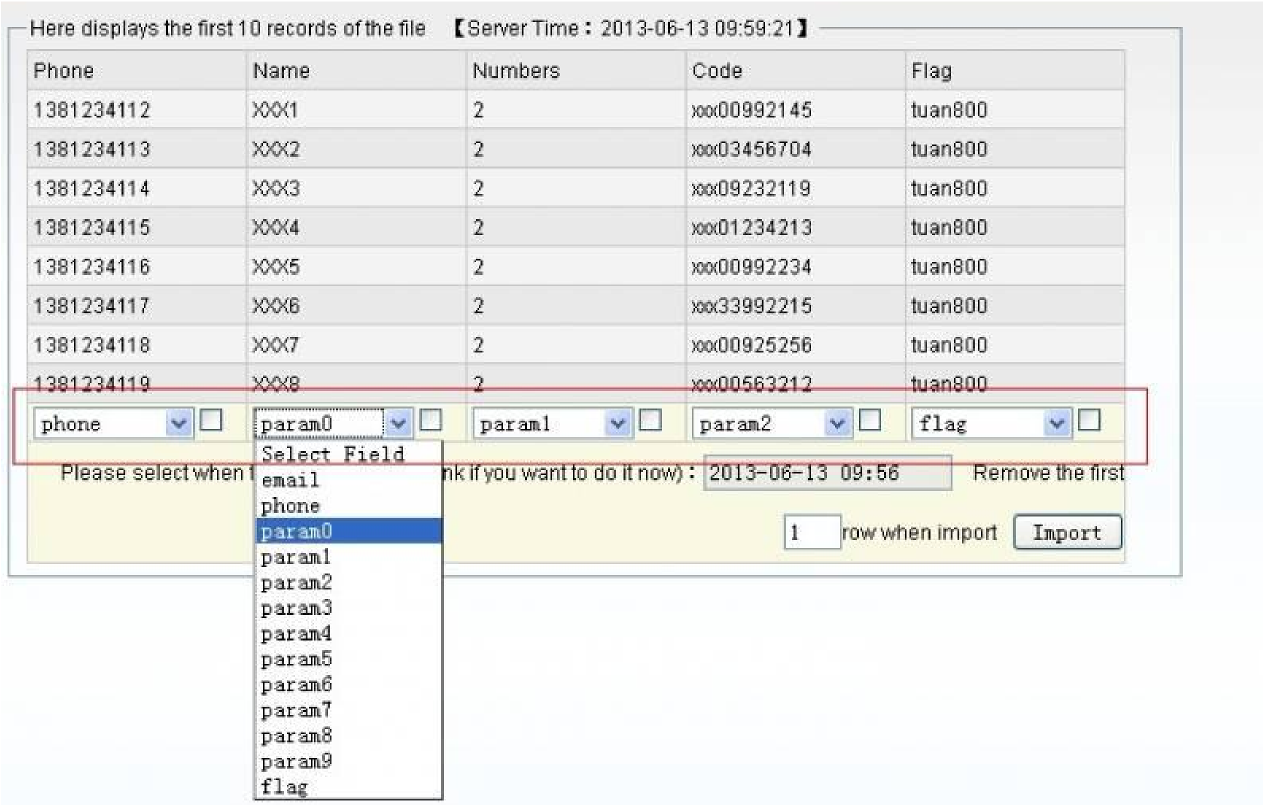
Customer Source

Import data to mass target customers

Call Center → Import, upload the file, and choose mass target customer (See the picture)

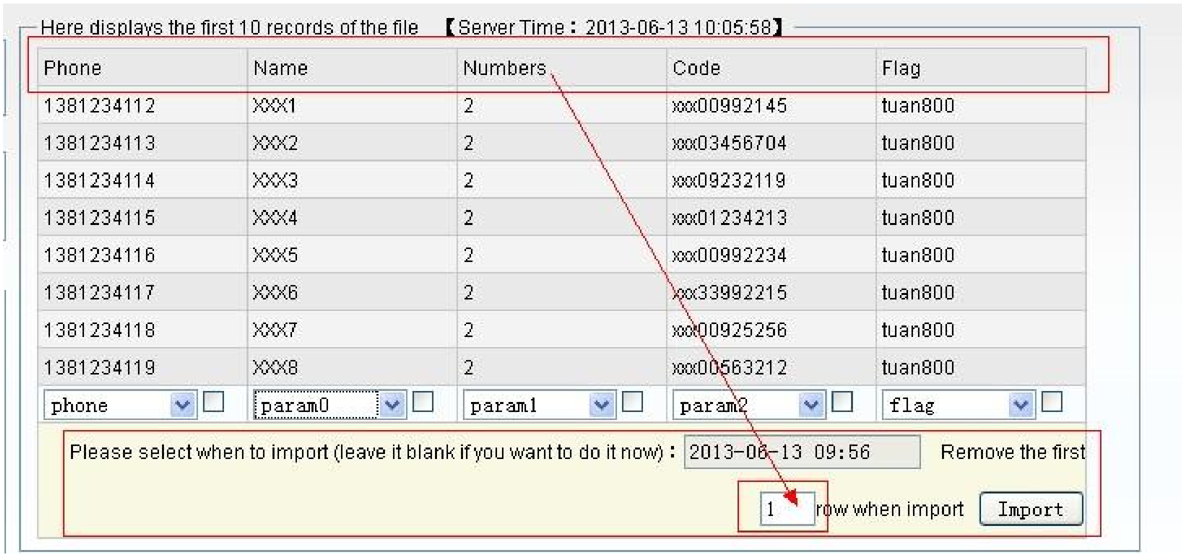
The data in the file contains three parts, the first we call it target, and it is a must, that is the telephone number or email address of the customer. The second part is the variable data (e.g., the customer name, remaining balance, order number etc.). If the template does not employ any variable, 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.

According to the settings of the template you are going to use, match the customer information with the variables accordingly. See the picture,

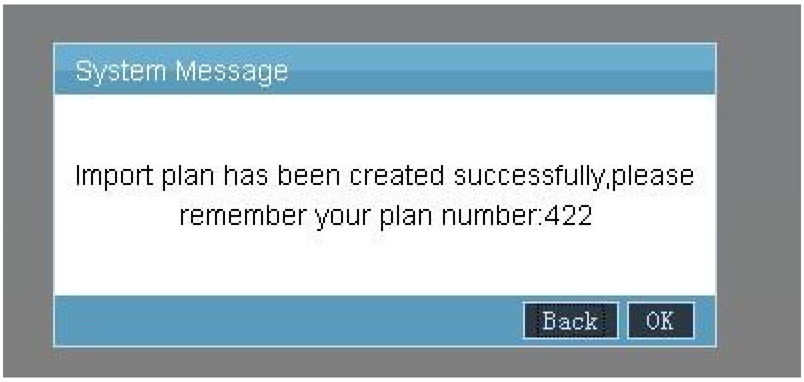


param0、param1…param9

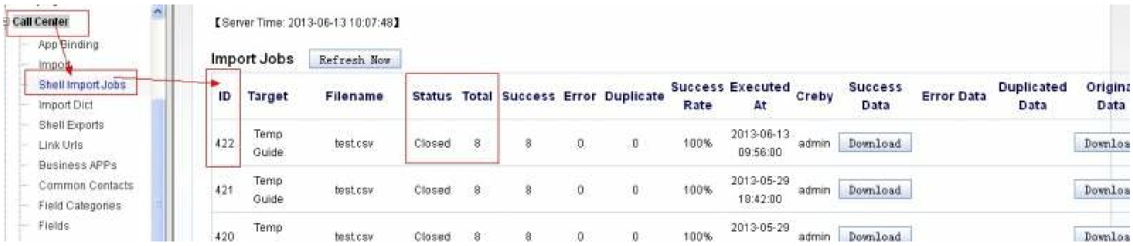
Generally, the first line of the file is the title, not the actual data, so we need to remove the first line. At the meantime, we need to set the execution time of importing, that the system will import the data at that time. When the time is before the present time, it means import immediately.



Click **Import** and appears the following notice,



Remembe this plan number, and go to *Call Center* → *Import* to check the progress with this number.



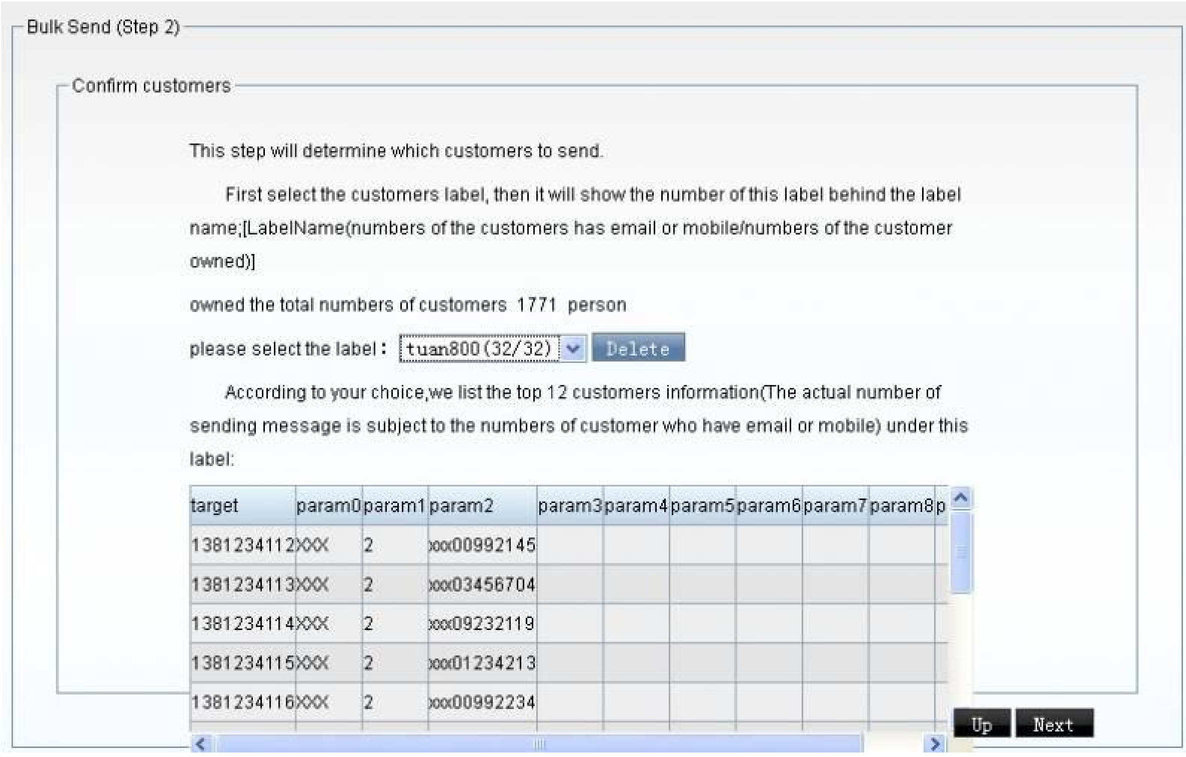
How to bulk send

Messages → *Bulk Send*

Step 1, choose sms or email and the customer source.(See the picture)

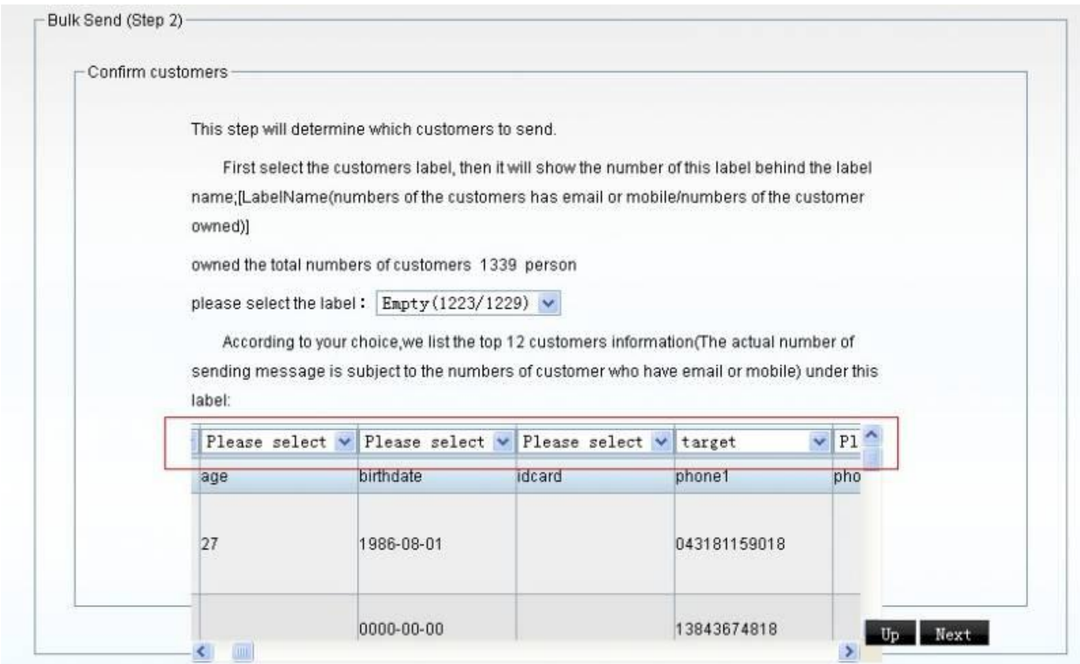
Step 2, Choose a label and find the target customers in the source.

1.If mass cusomters list is being used, you will see,



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,

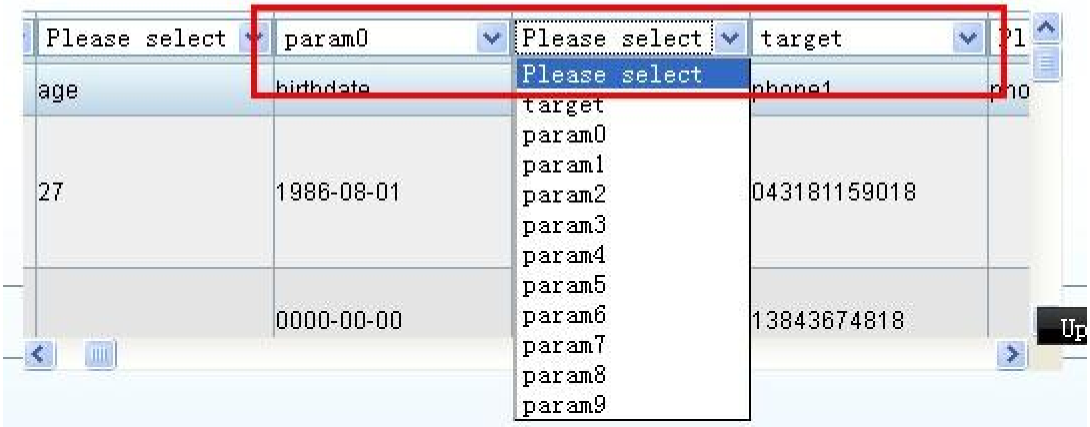


These tabs from Customer → Individual Tags. Only when customers have chosen this labels can we find them through the labels.

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.



We can also see the following information in step 2,

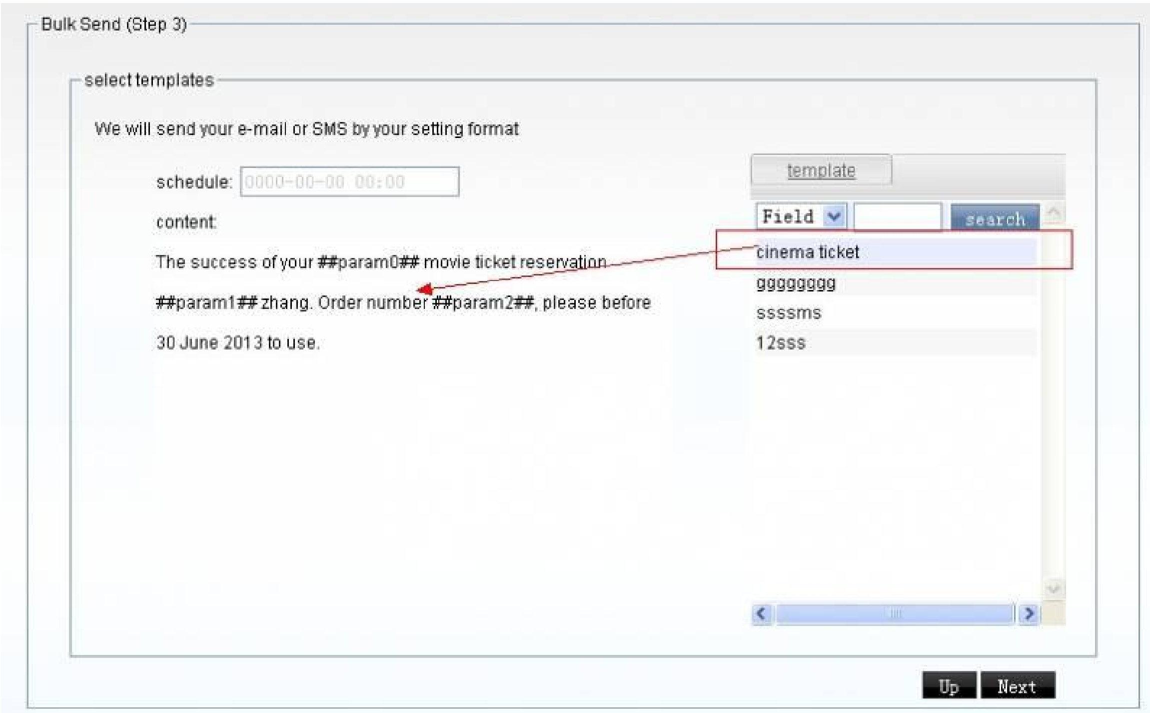
We have XXXX customers, which means how many customers are there in this list.

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.

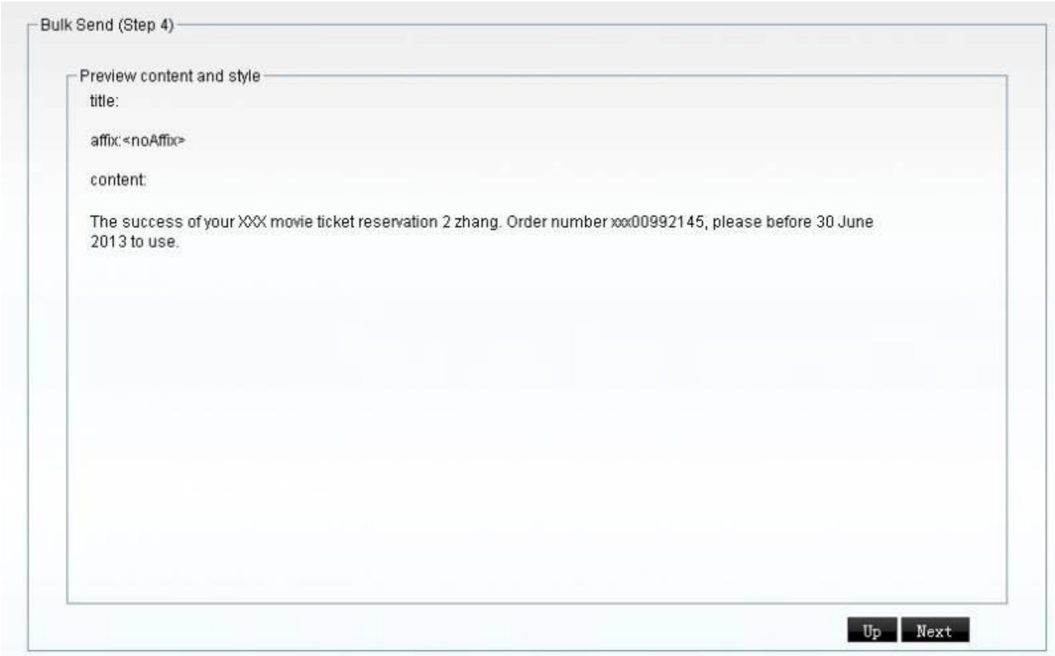
2 means the total number of the people who have this label.

Step 3, choose a template and set sending time.



Double click a template, and let its content shown on the content area.

Step 4, preview. See the picture,



The system will replace the parameters with information of the first customer, and you can check whether it is correct.

Step 5, 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 th working efficiency will be increased and the waiting time of staff will be decreased during the sending process.

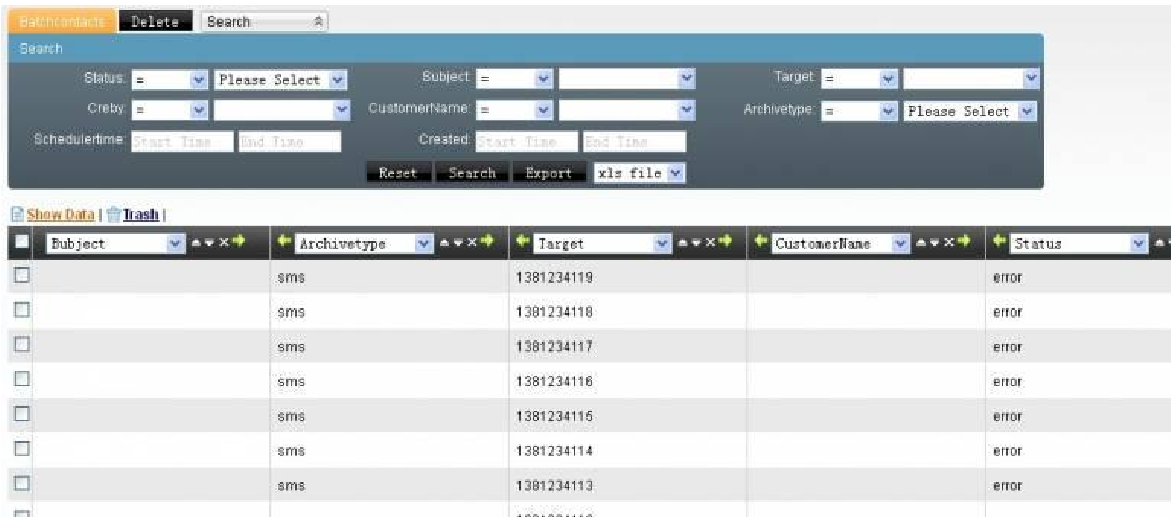
Unprocessed tasks and tasks unsuccessfully processed (can be searched with status field) will be listed on the batch contacts page. You can see this page as a joural list.

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**.



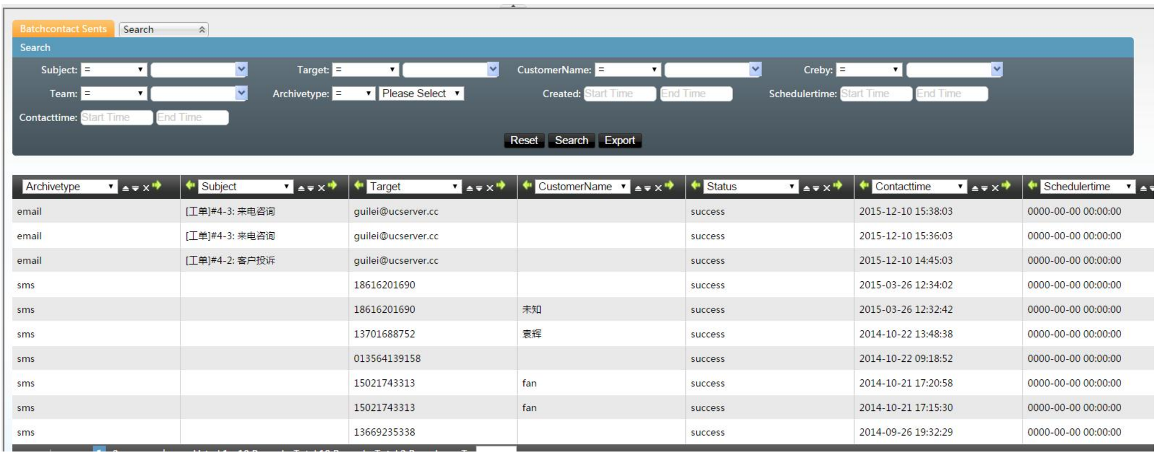
Double the message in the list to edit the message.

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.



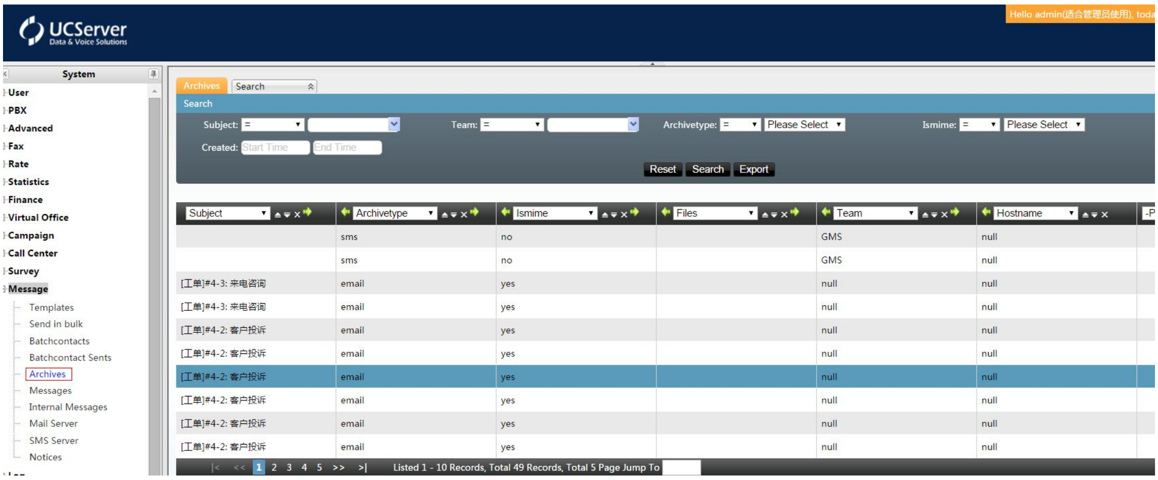
If you want to re-sent a message, you can edit the record, change the status to “New”

12.5 Archives

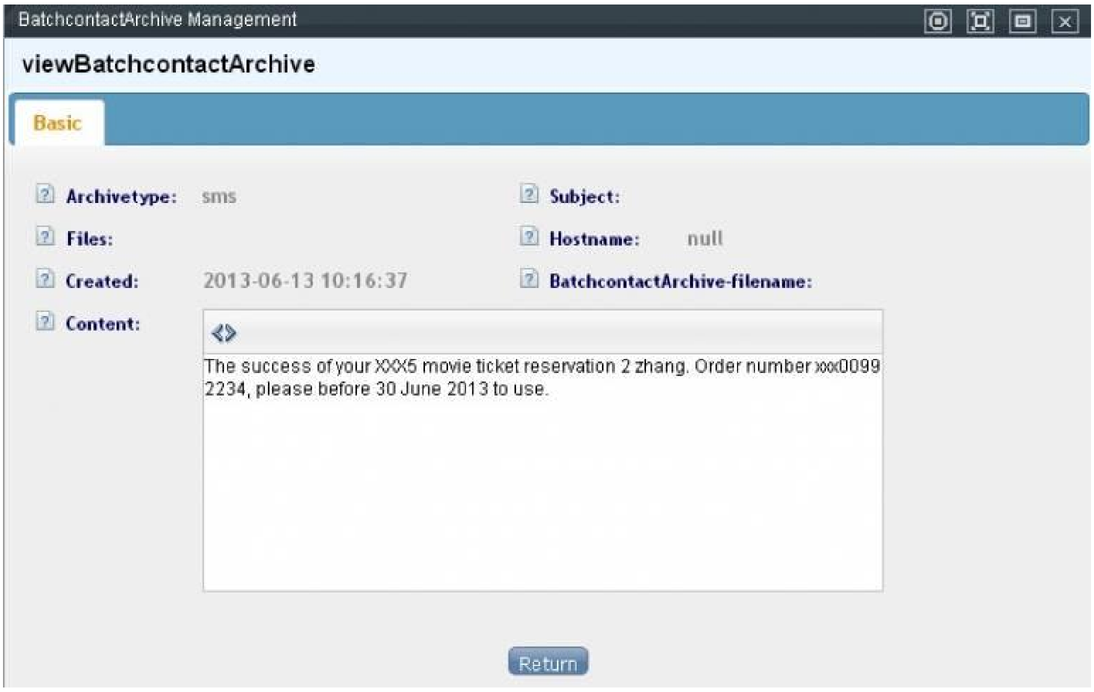
This page is designed to work with Batchcontacts and Batchcontact Sents.

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.



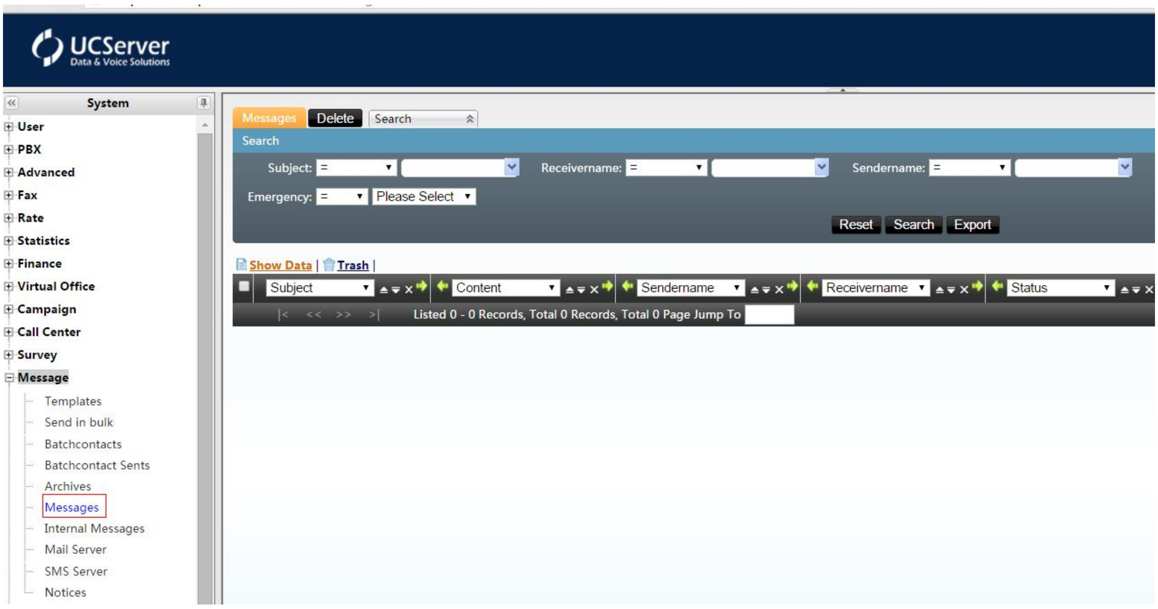
Double click the data in the list to see details.



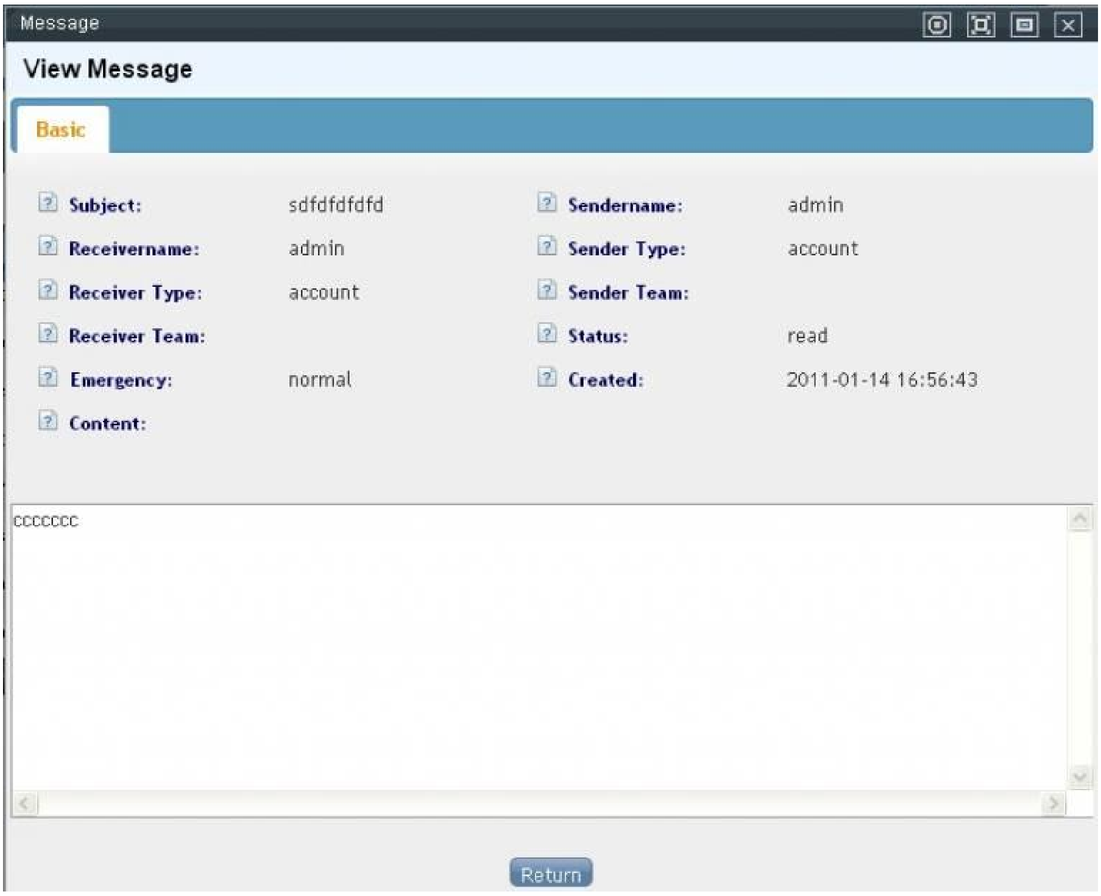
Archives are for view only, cannot be added, edited, or deleted.

12.6 Message

This page is for checking the internal messages you sent and received.

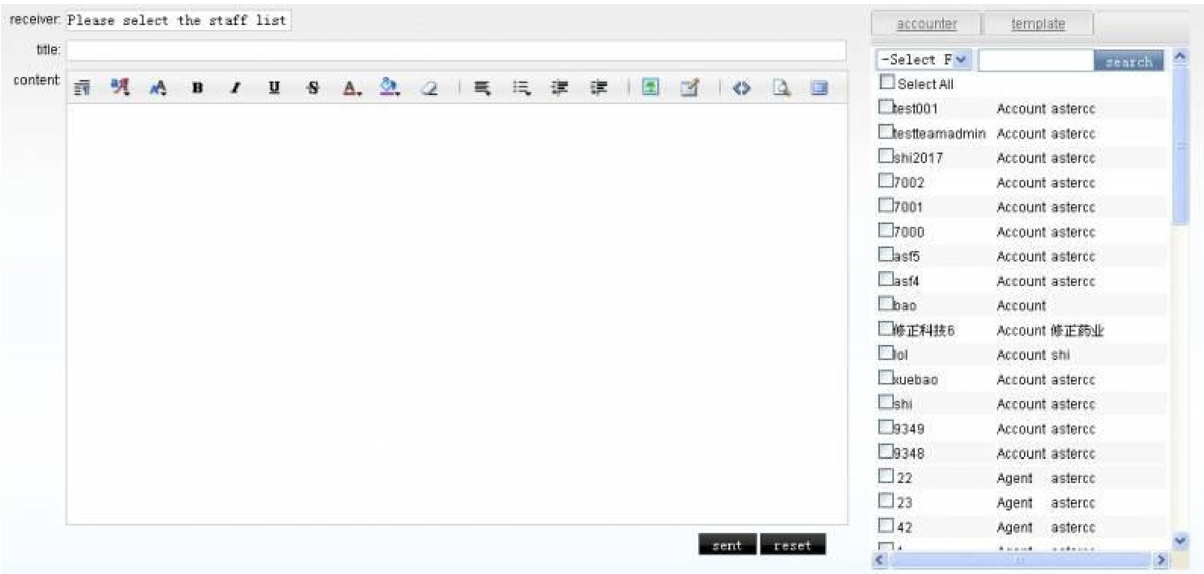


The "unread" status means the receiver has not read the message. When the receiver double click the message record, the status would turn to "read"



12.7 Internal Message

Internal Message is used to send messages between system users.



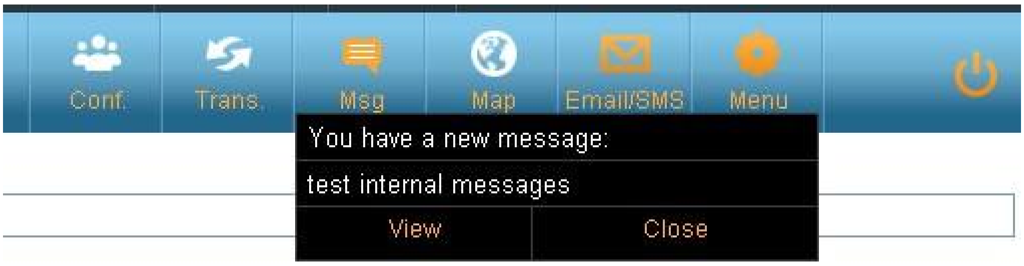
How to send a internal message:

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



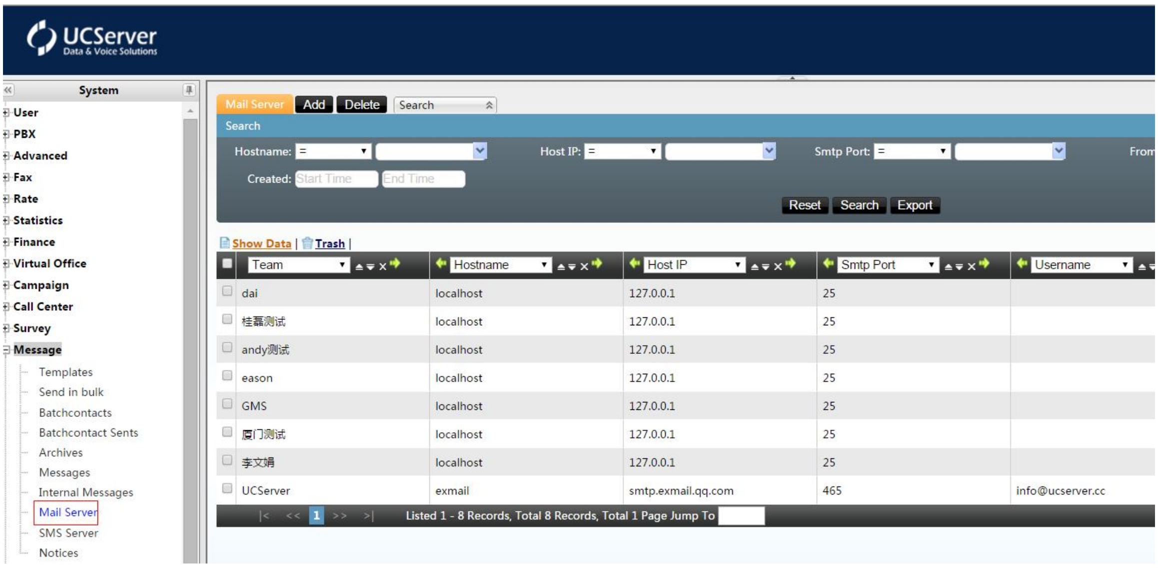
en/module

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.

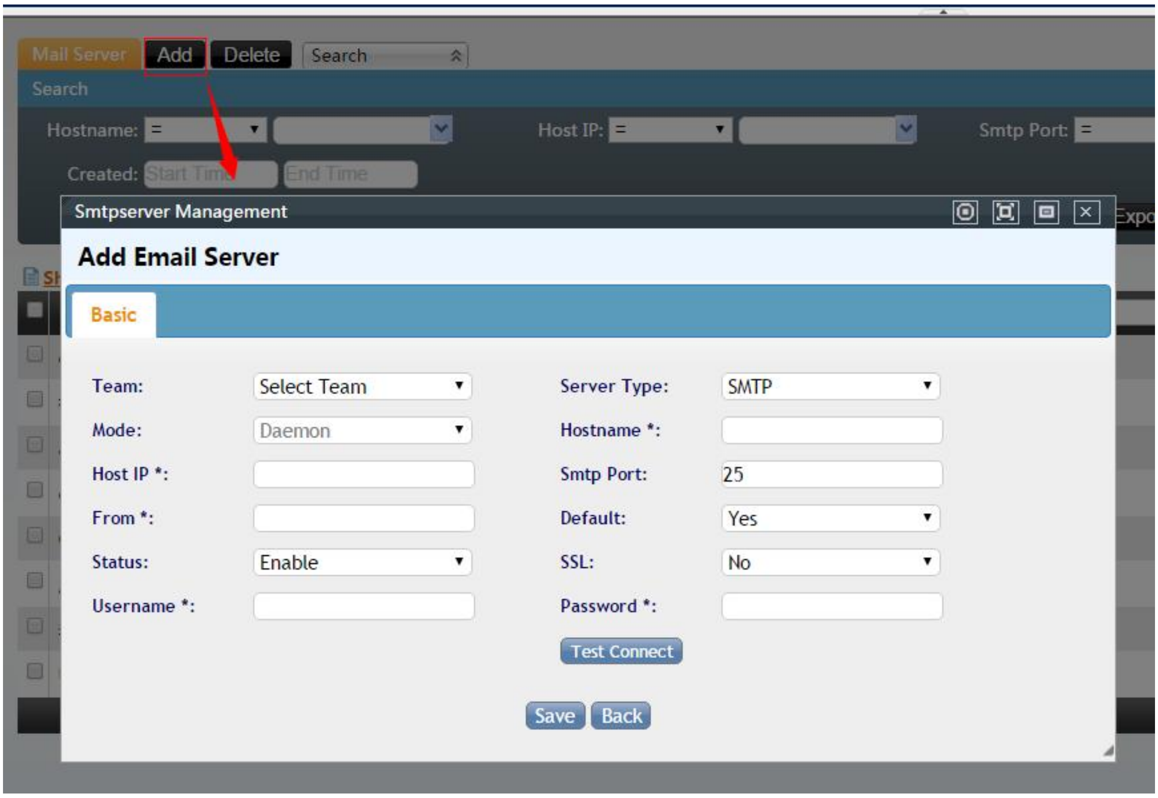
This is used in Send in bulk, Agent Message, Invoice, Work Order etc.

Message–> Mail server to enter the page below.



Add

Click [Add] to open the mail server add page.



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 porvider. For instance, you want to send emails with you 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 choosen.

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 writen 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 yo email account here.

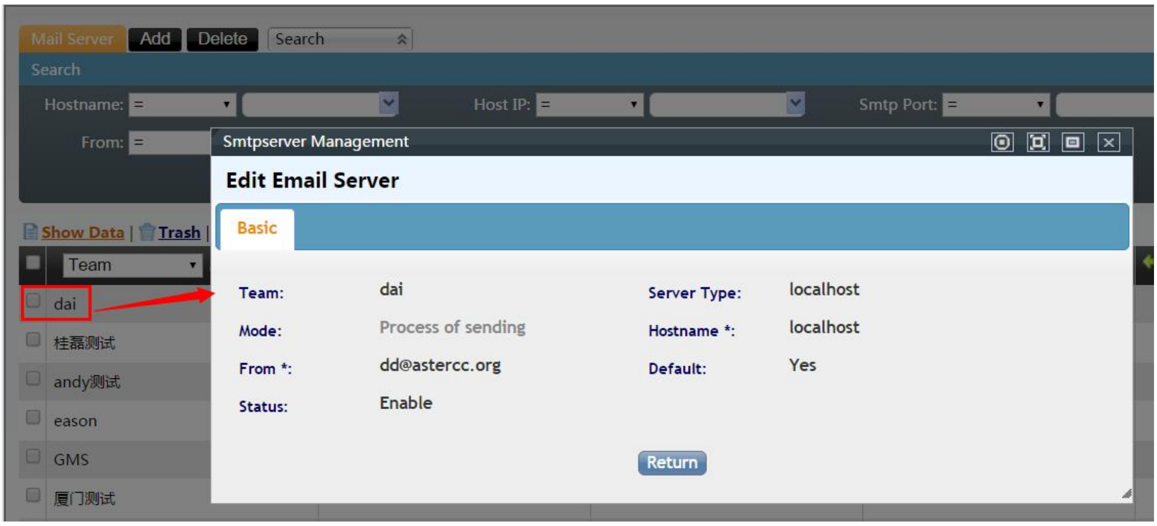
When server type= php, username and password are not neccessary.

Test connect：Finishing all and click **[Test connect]** (aims at Sever 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.

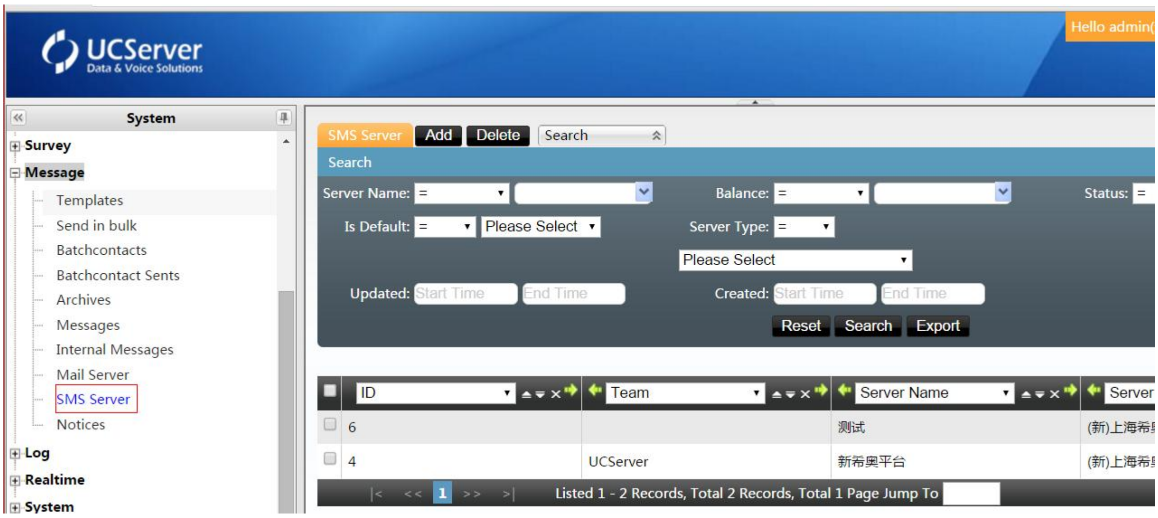
Edit

Double-click the server has been added，we can edit it，as following：



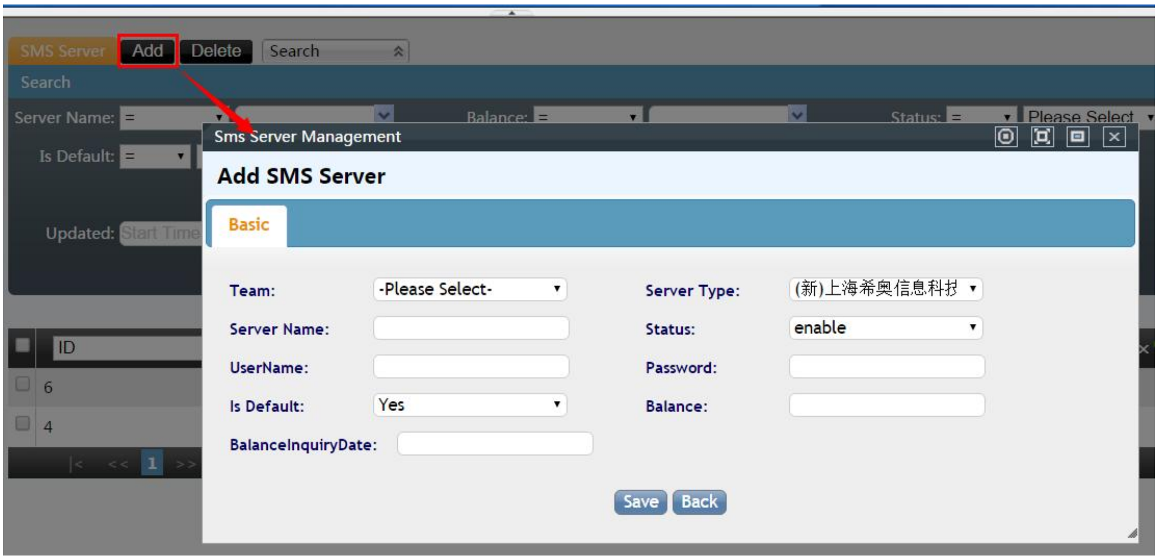
12.9 SMS Server

On the left menu, please go to[**Message**]–> [**SMS Server**] to open the page.



Add

Click [Add] to open the SMS server add page.



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.

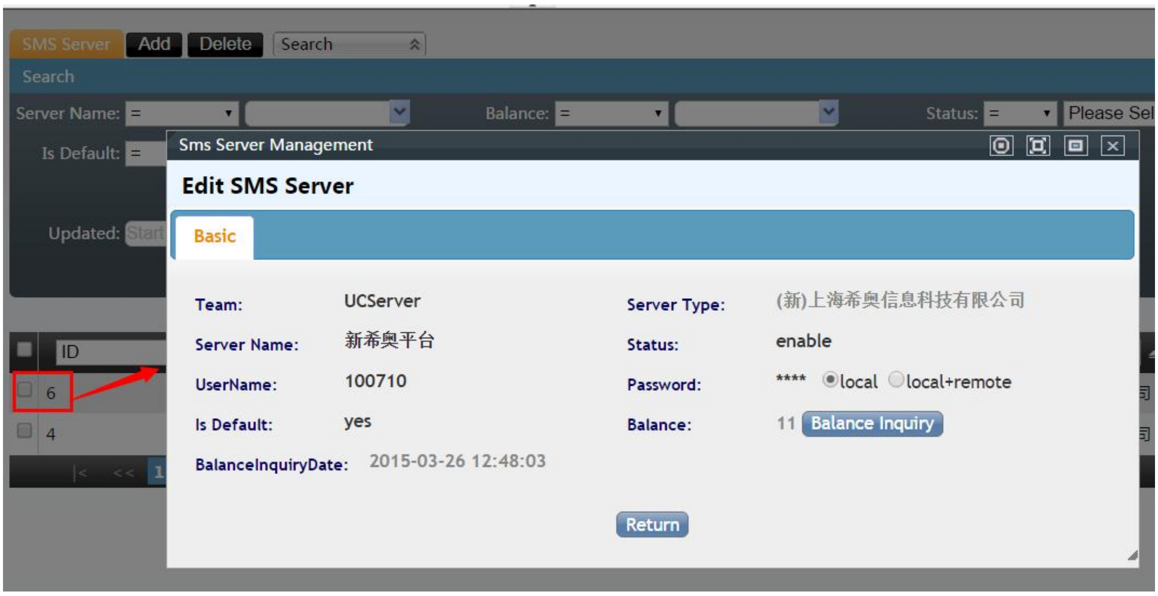
Balance: How much balance left for sending SMS.

Balance Inquiry Date :

After finishing it, please click [Save] button.

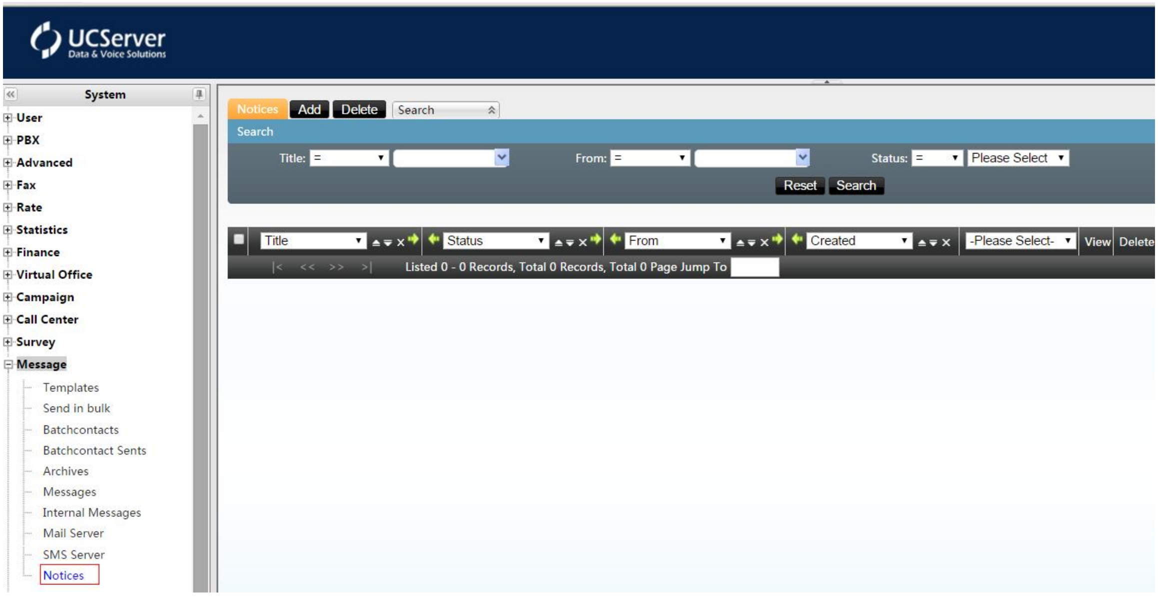
Edit

Double-click the server has been added, we can edit it, as following:



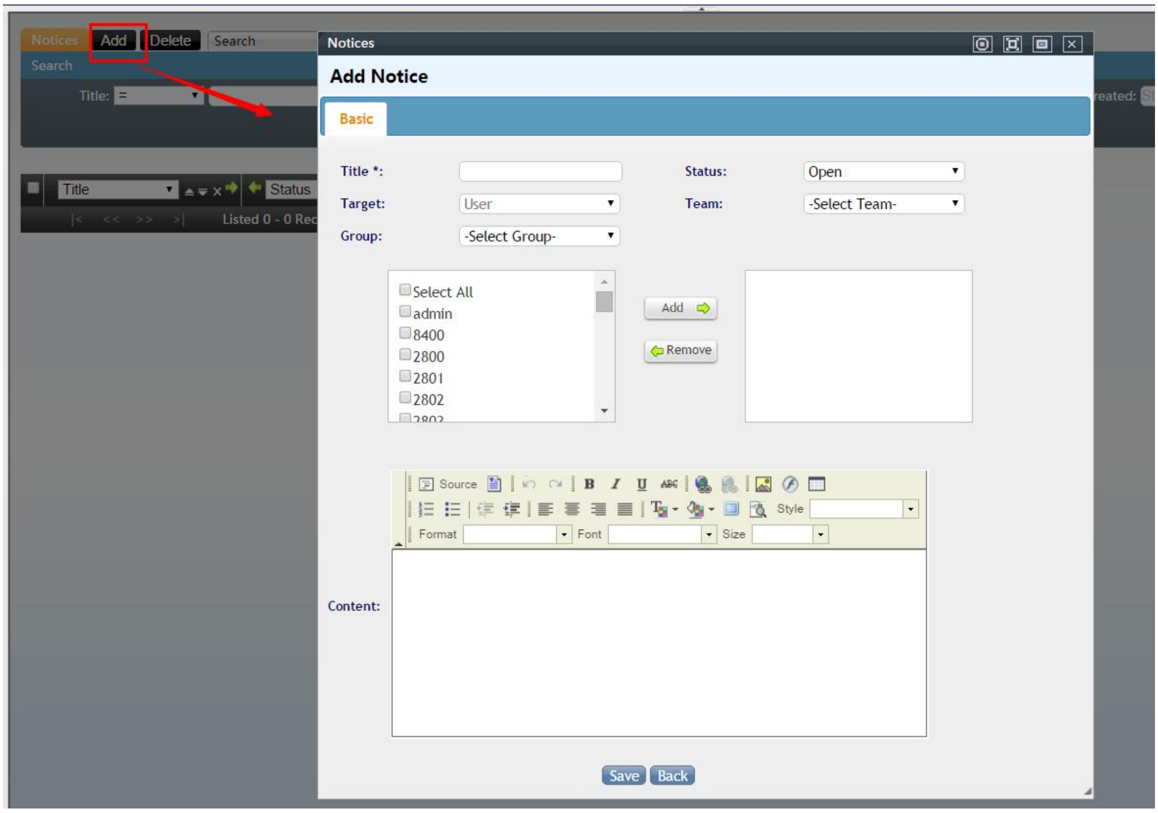
12.10 Notice

On the left menu, please go to[**Message**]-> [**Notices**] to open the page.



Module function: to release notices (automatially 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

Opne, 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 sticked notice, it will sort by publish date

Target, **Team**, **Group:** for selecting the accounts that can see the notice in the system.

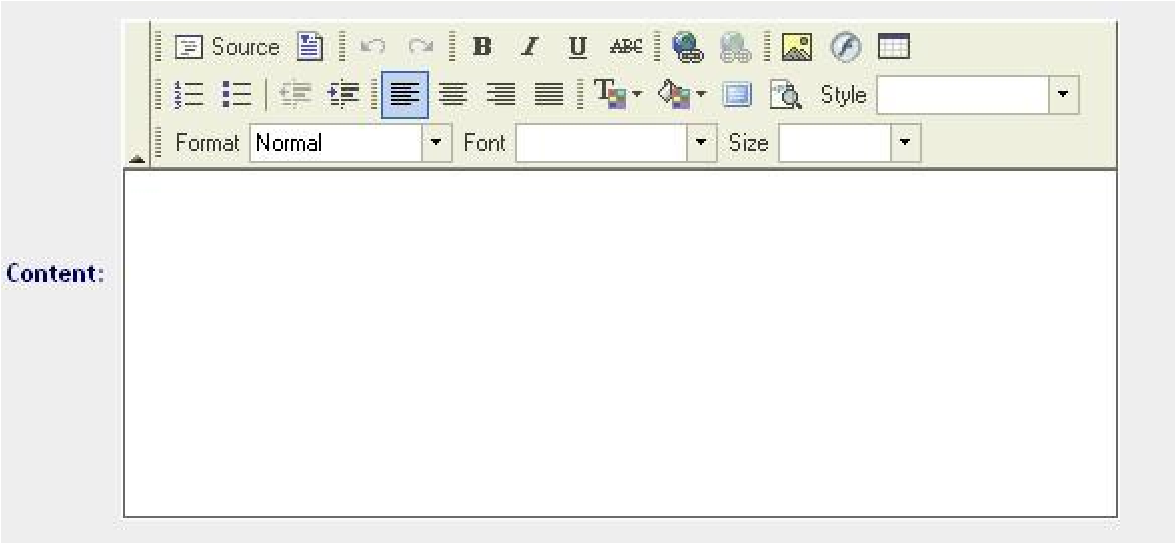
Choose team only and no group means the whole team can see this notice.

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.



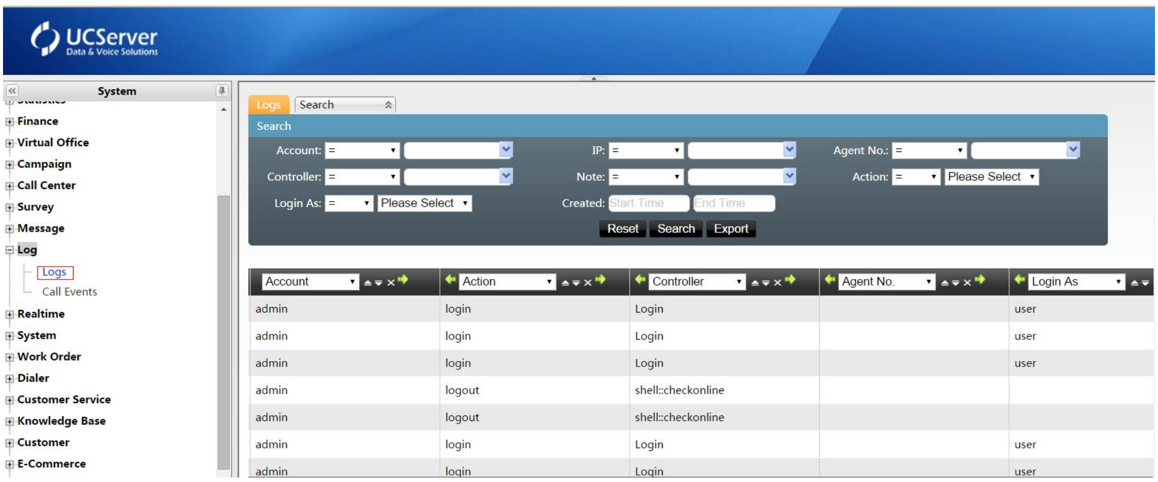
The effect when you edit is the effect will be shown on the web page.

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.

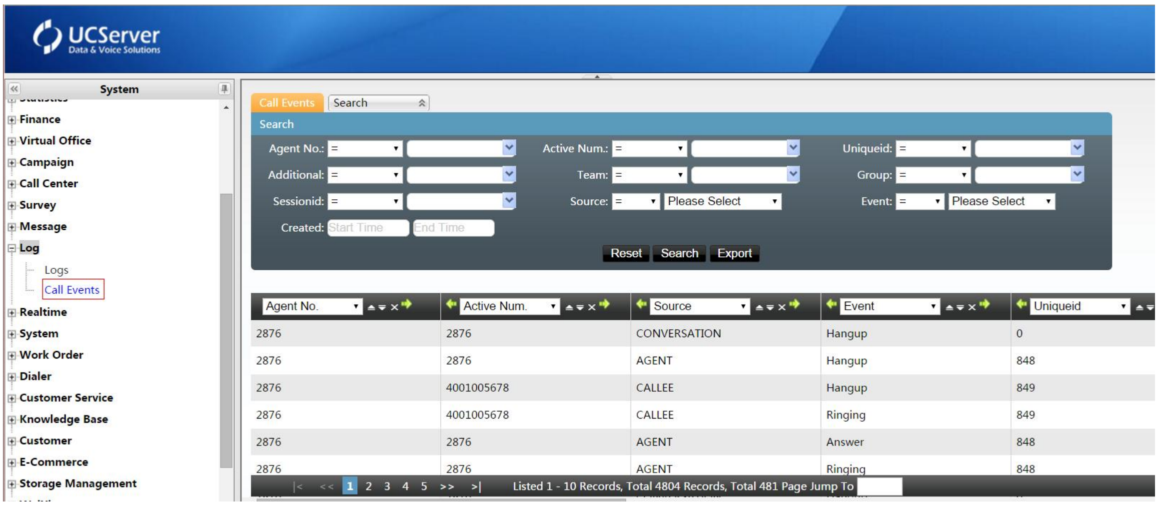
Account : account's username;

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.



Module Function: It is for checking the event log of agent work. The main events cantain:（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

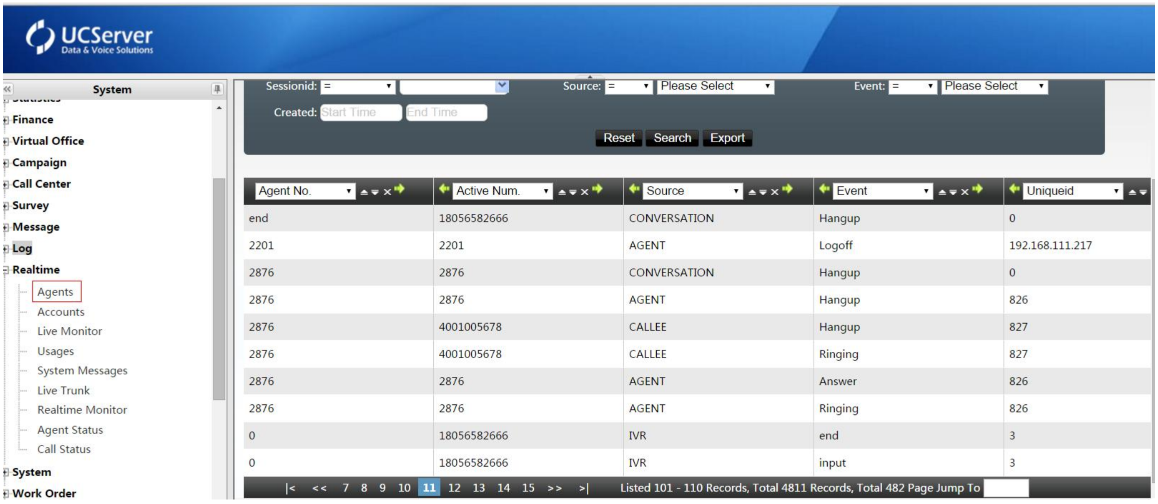
2018	5001	CALLER	Incoming	33

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

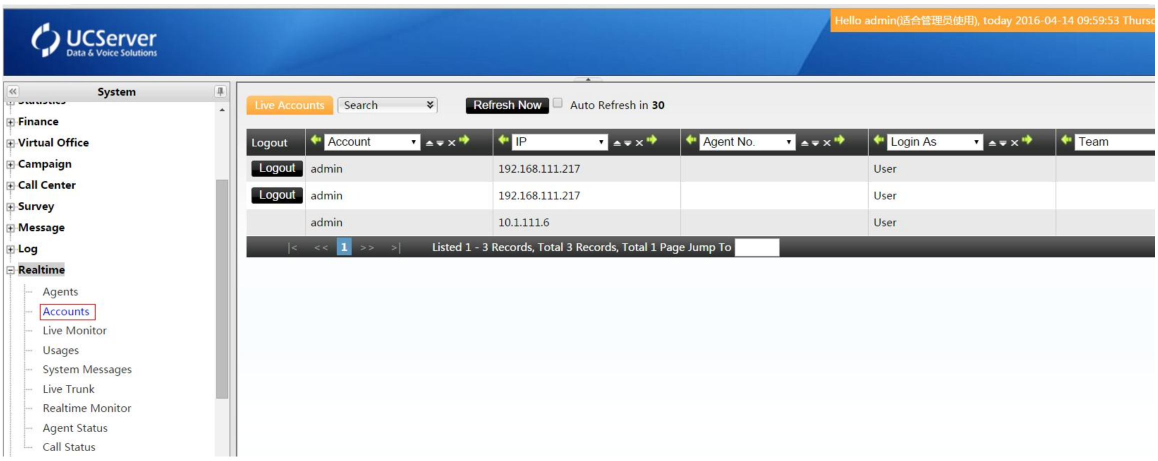
Pause Reason:

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;

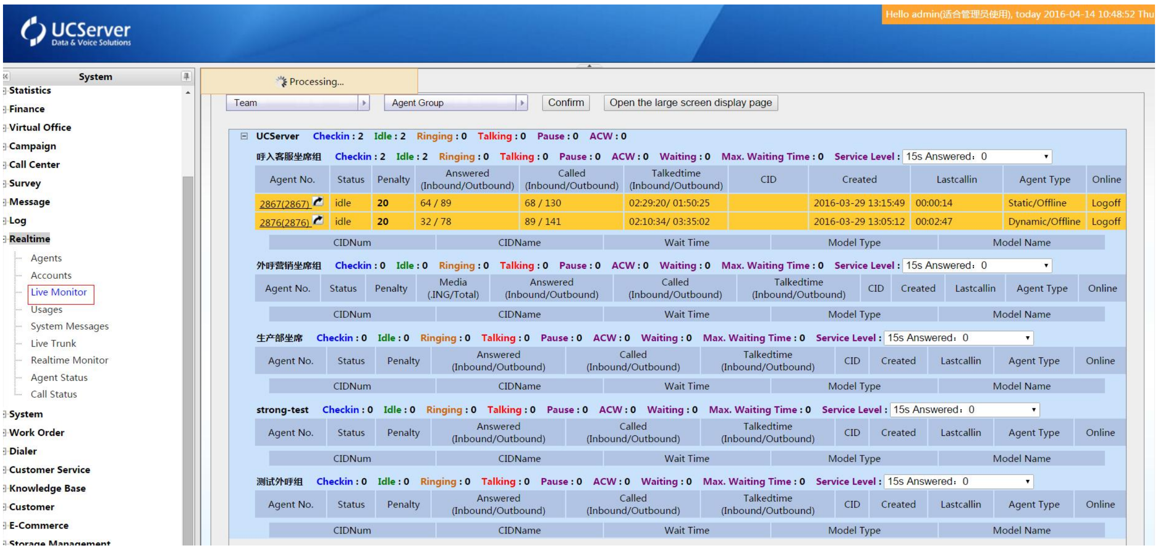
Group: which group the account belongs to;

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.

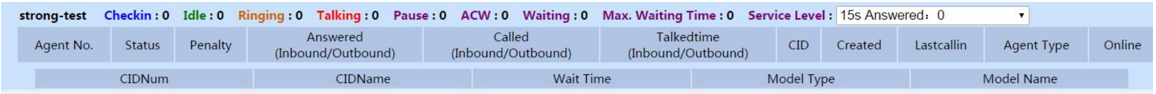


Module Function: To show the realtime agents' calling info.

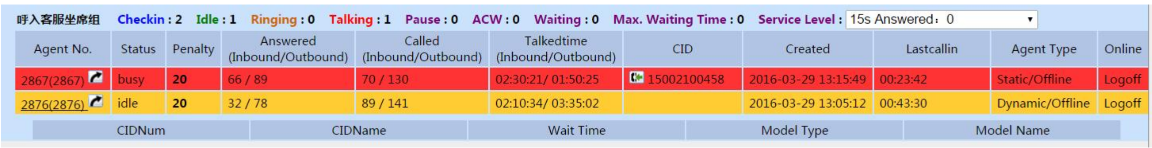
Team&Agent Group: To select a team and a agent group,then press Confirm, the page will show this agent group's info. If not select, the page will show all agent groups' info.

The team's total agents' realtime info:Chekin,Idle,Ringing,Talking,Pause,ACW

The agent's realtime info: Chekin,Idle,Ringing,Talking,Pause,ACW



If the agent is in the call, the bar will turn to red, and show the CID number.



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;

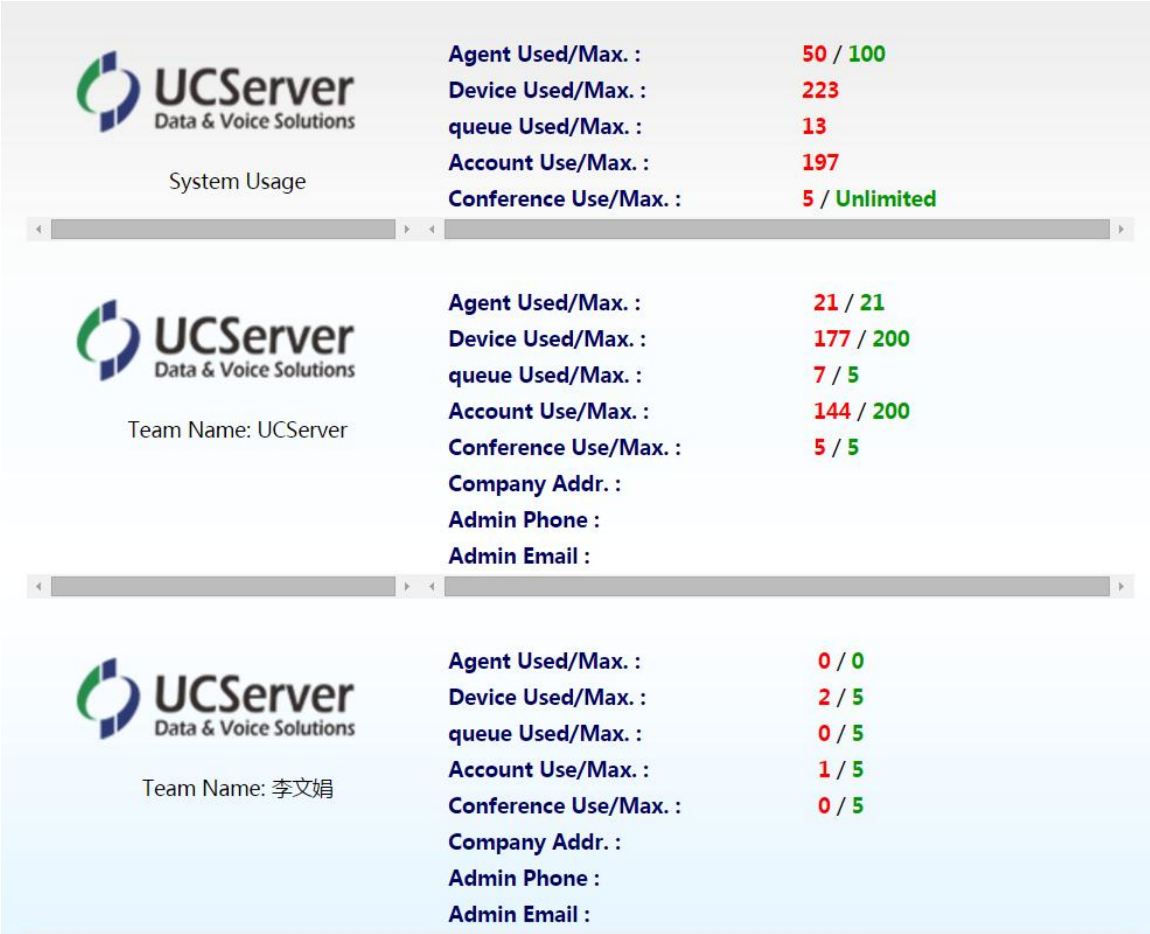
Last Callin: How long from the last callin;

Agent Type: "/"Whether the agent is static or dynamic, offline or online;

Online: Whether the agent is logoin or logoff;

14.4 Usages

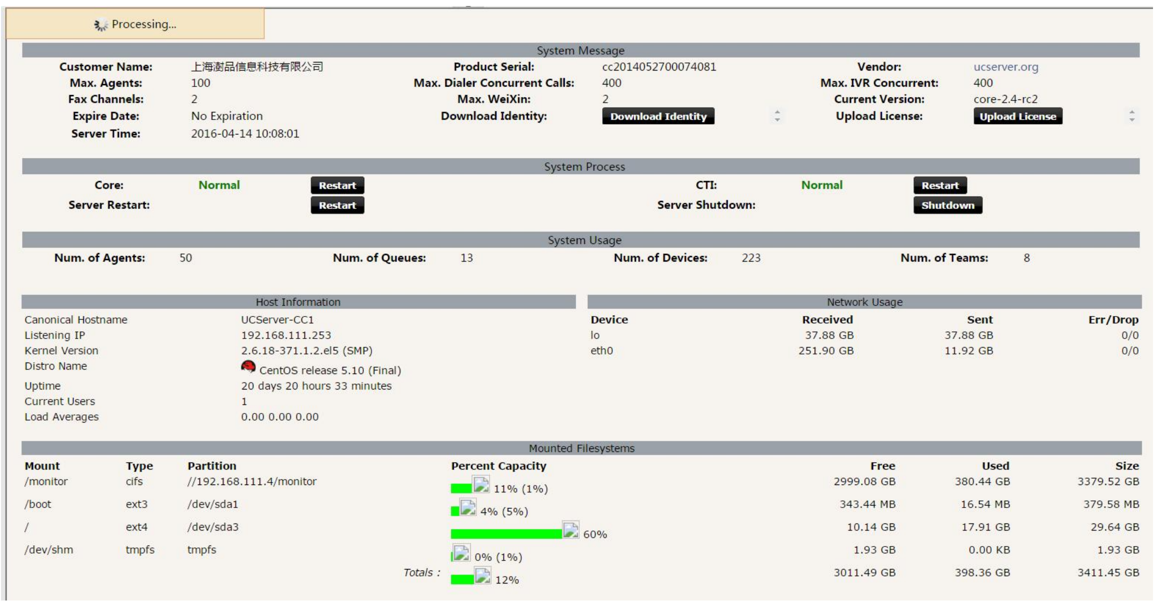
On the left menu, please go to[**Realtime**]-> [**Usages**] to open the page.



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.



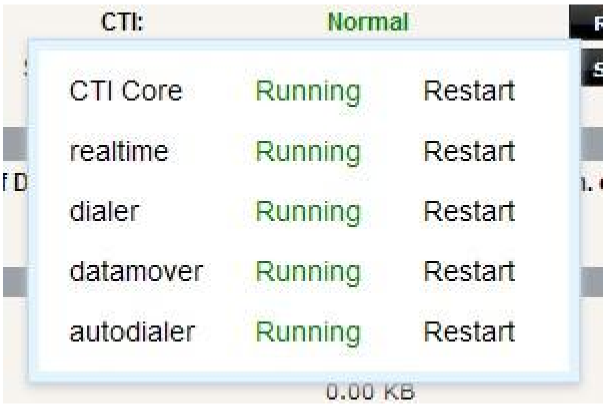
System message

Customer name: the name of this authorised user
Max agents: the authorised max number of agents
Max dialer concurent calls: the max concurrent calls of the authorised dialer
Vendor: the software releaser
expire date: the expire date of the authorisaton
Server time: the server time
Download identity: download identity
upload lisence: upload lisence for authentation

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.



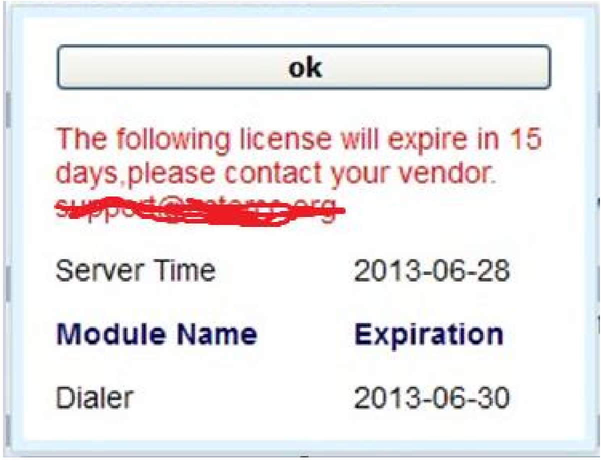
Server Restart: restart the server
Server Shutdown: shut down the server

Systen usage

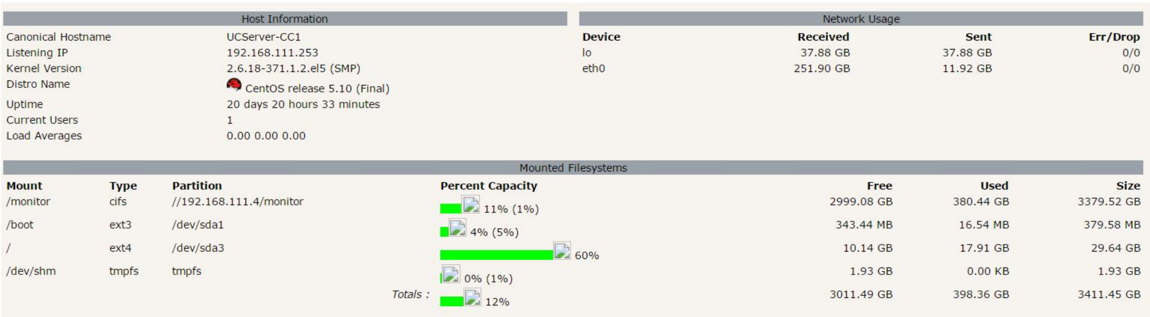
num of agents:How many agents the system has now.
num of queues: How many queues the system has now.
num of devices: How many devices the system has now.
num of teams: How many teams the system has now.

System Module Expire Promot

If the module will be expired in 15 days,it will promot on this page,like this:

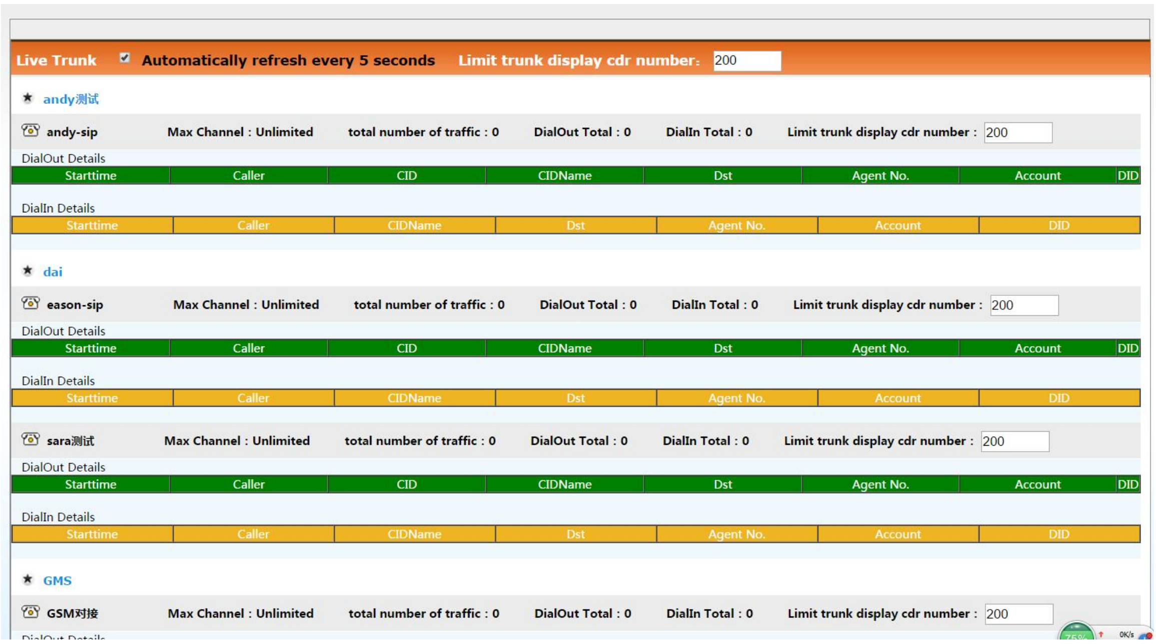


the following are all the information about the server where the software is



14.6 Live Trunk

On the left menu, please go to[**Realtime**]–> [**Live Trunk**] to open the page.

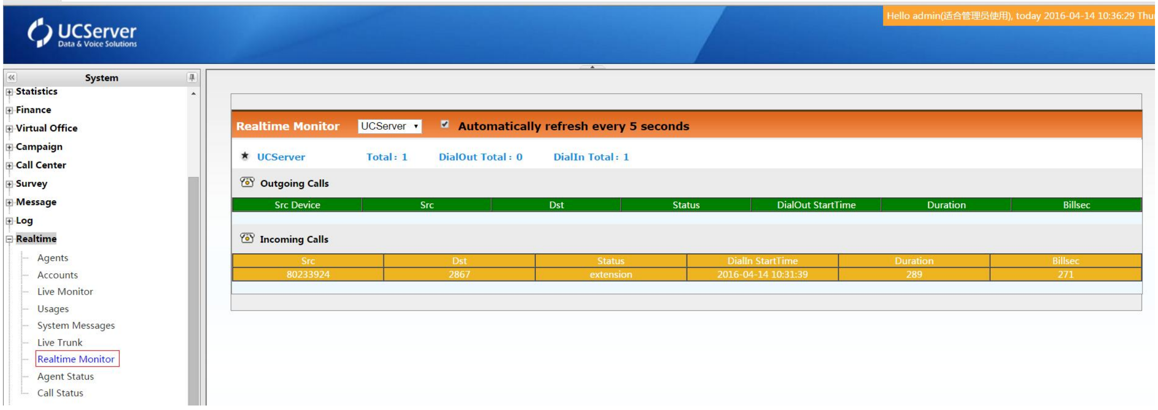


On the page,it will automatically refresh every 5 seconds(If do not need,please cancel the checkbox's checked status),show the calls on the trunk

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.



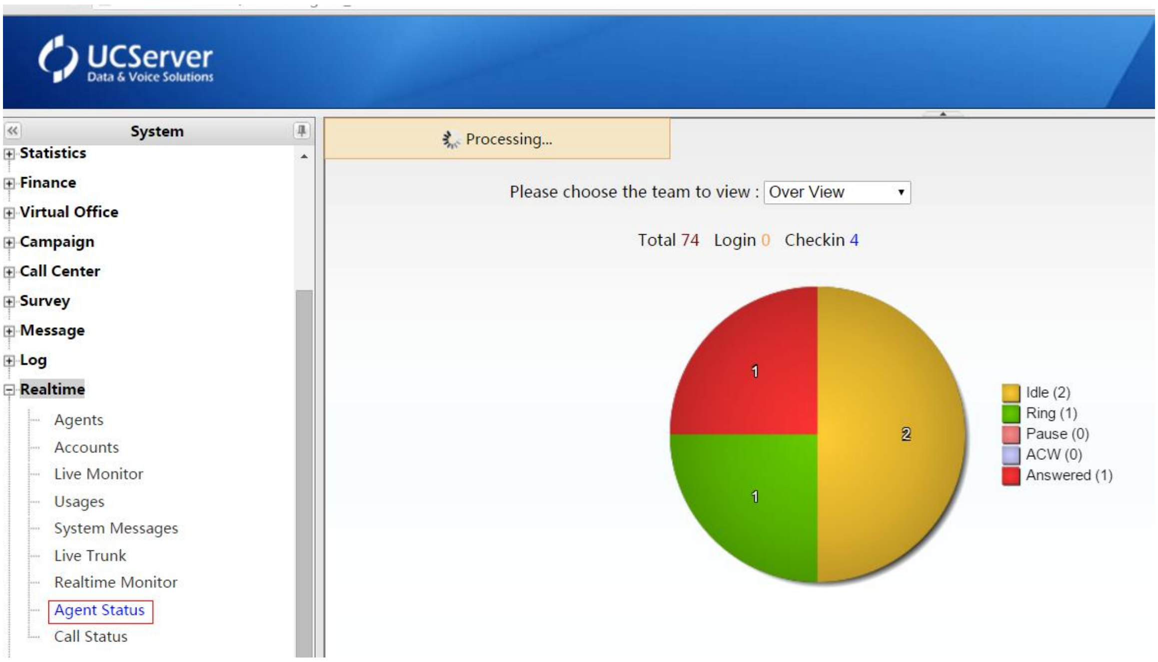
Module Function: show the realtime calling statues of a team.

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.

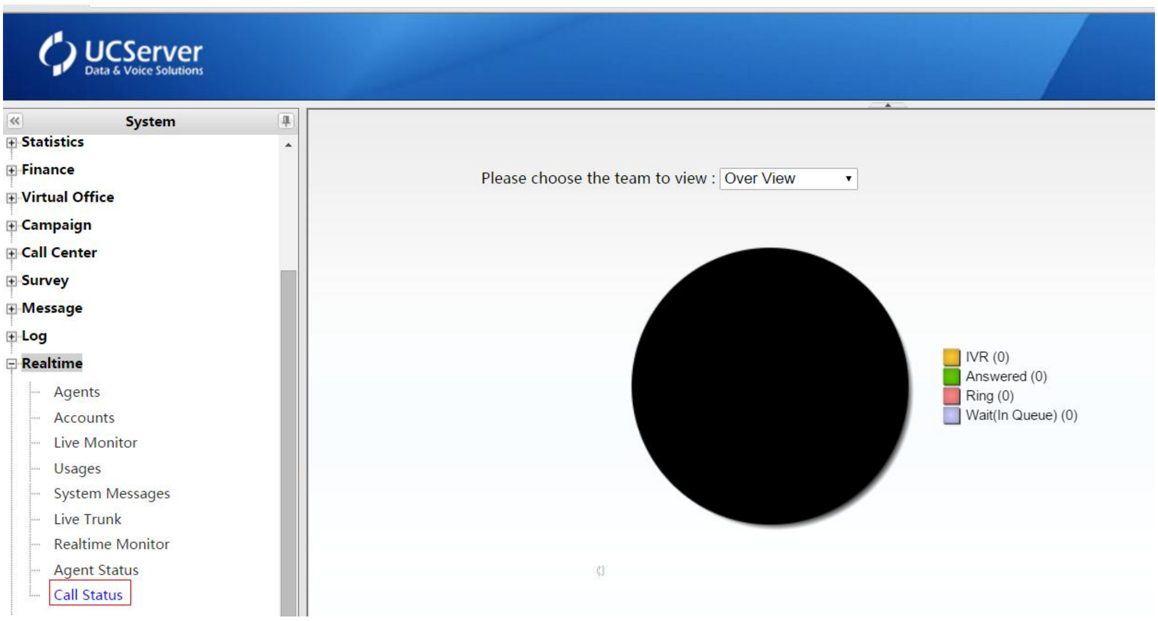


Module Function: show the realtime agent status.

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.

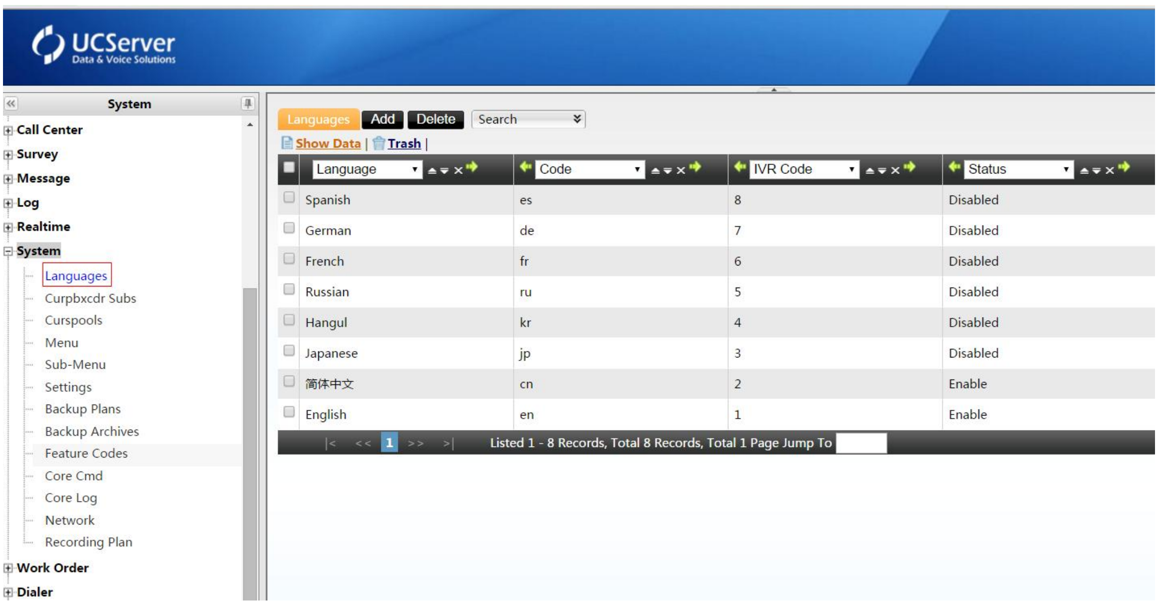


Please select a team firstly, then it will show the IVR,Ring,Answered ,Wait(In Queue)status of this team.

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;

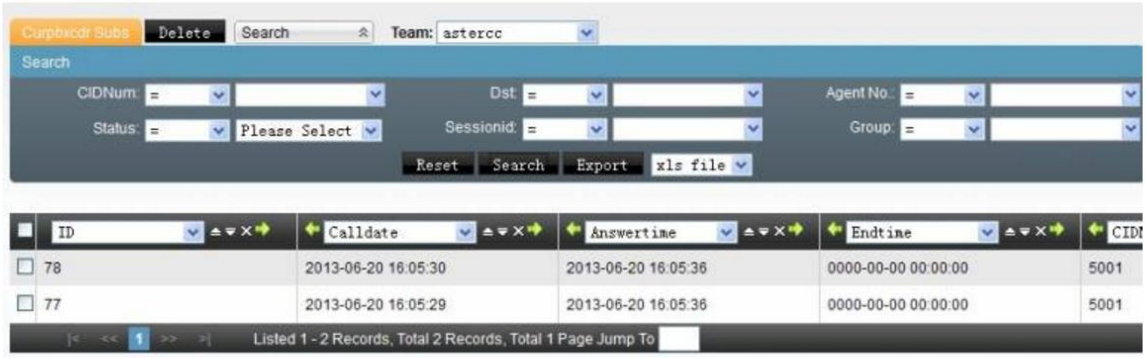
IVR Code: The ivr code, please don’t modified it once set, or the IVR will go wrong.

Status: Whether the language is enable or disable;

Note: Give a note to this language;

15.2 Curpbxcdr Subs

On the left menu, please go to[**System**]–> [**Curpbxcdr Subs**] to open the page.



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.

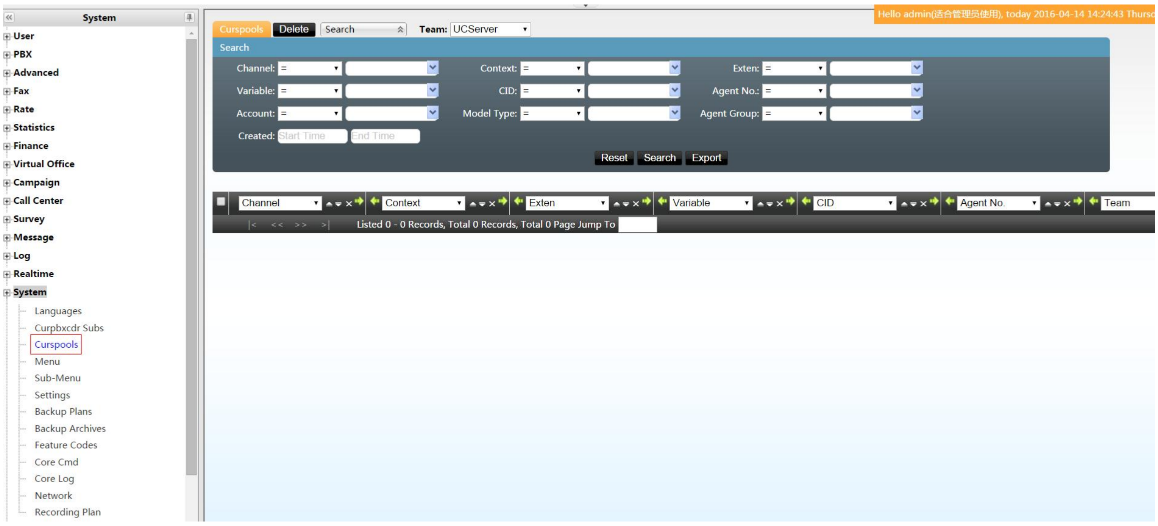
The agents can delet these data in their working platform, but the privilege requires.

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 repeatly ".The administrator has to enter this page to delete the wrong data.

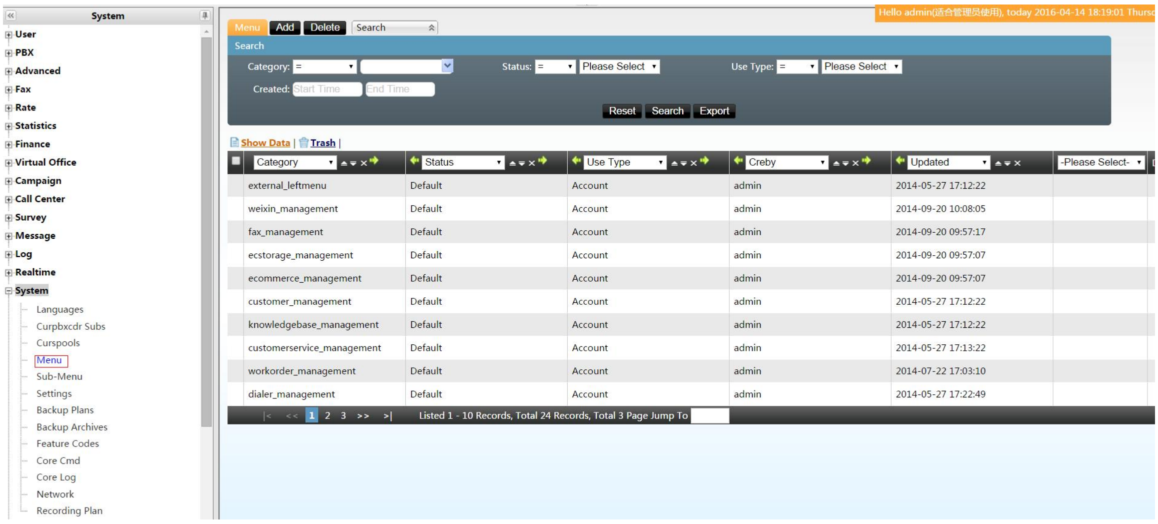
Before deleting the data, please comfirm:

1.The created time is longer than 1 min;

2.The agent has not had conversation with this customer.

15.4 Menu

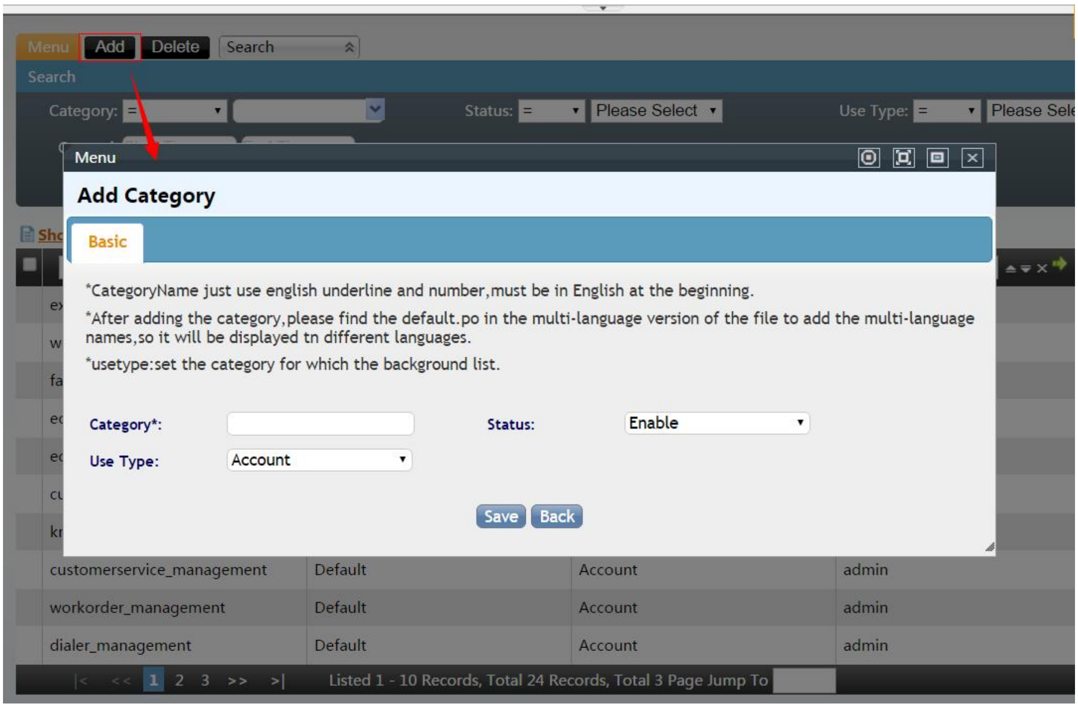
On the left menu, please go to[**System**]–> [**Menu**] to open the page.



Module Function: To save and reorder the system catagories.

Add

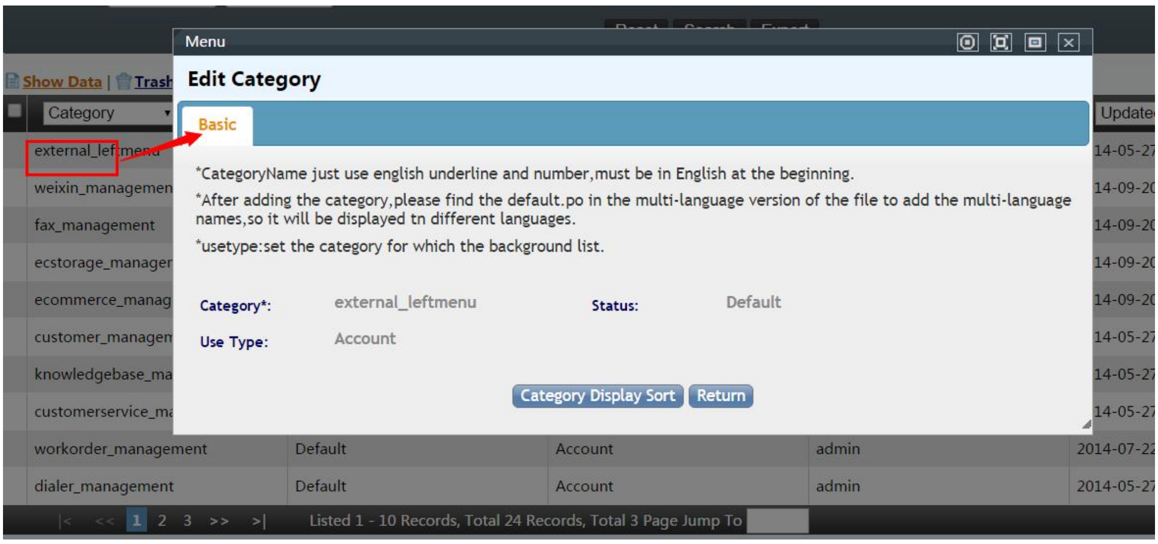
Click [Add] to open the menu add page.



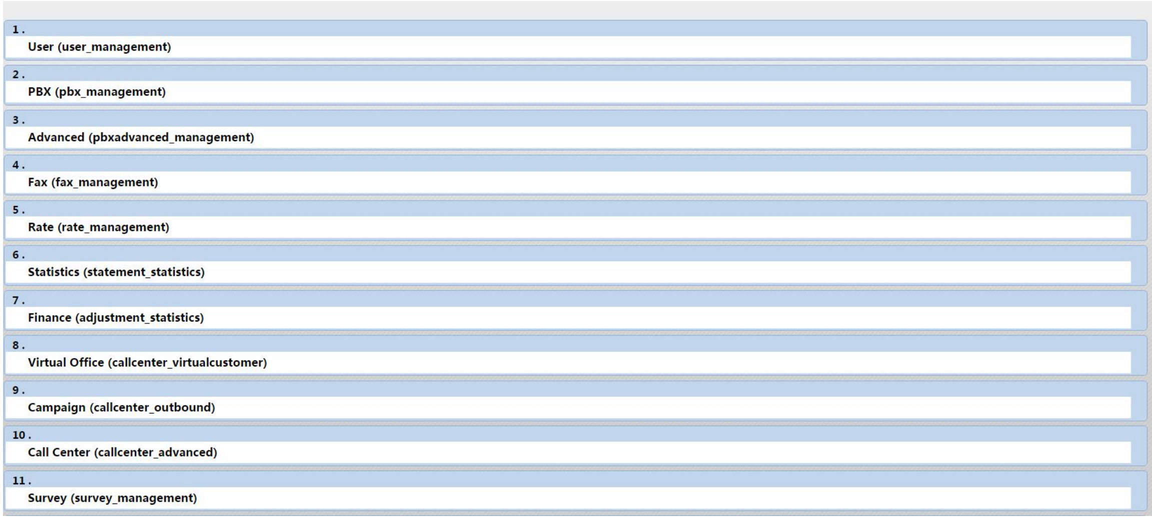
*CategoryName just use english underline and number,must be in English at the beginning.
*After adding the category,please find the default.po in the multi-language version of the file to add the multi-language names,so it will be displayed tn different languages.
*usetype:set the category for which 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:

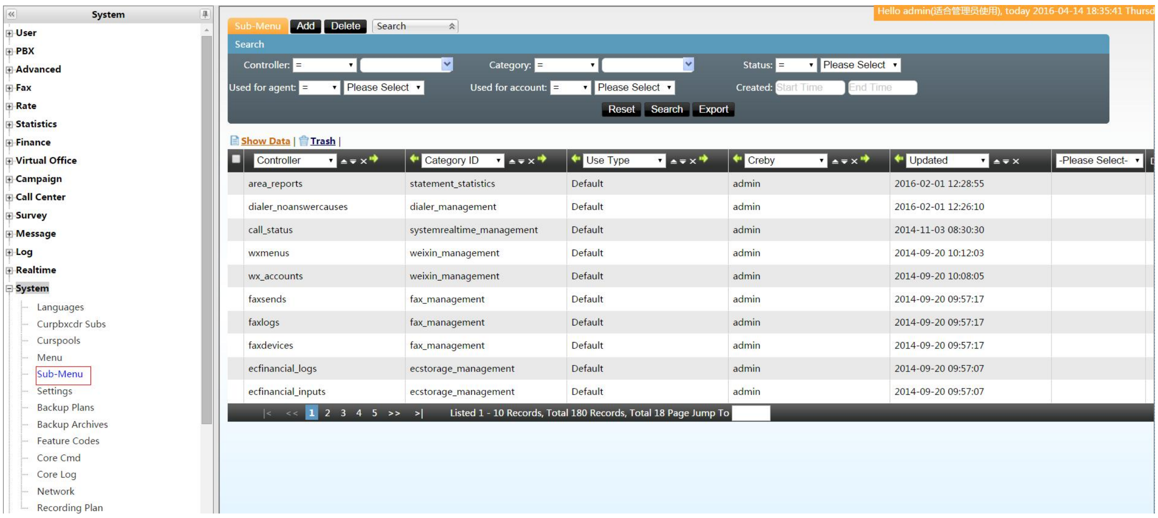


You can swift these orders by draft the items. Click Save Current Order button after finishing.

When fresh the system, you will see it has list the catagory by your new settings.

15.5 Sub-Menu

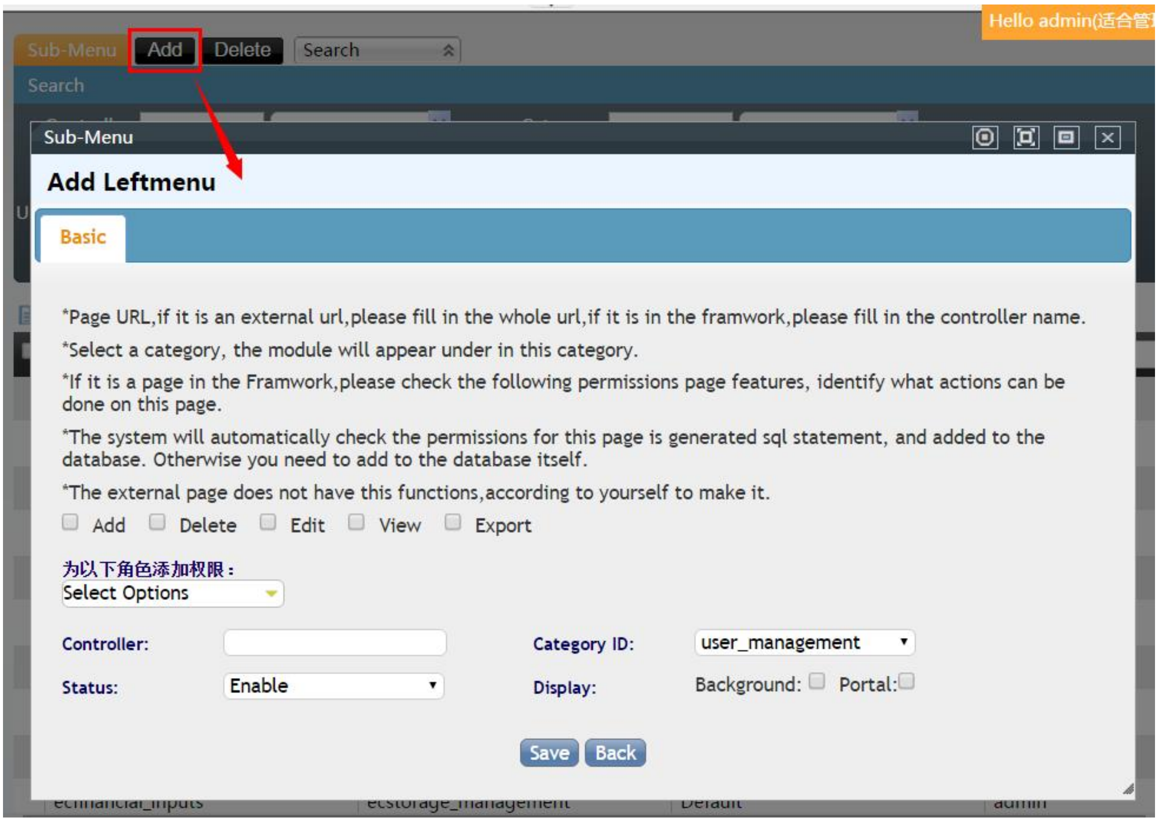
On the left menu, please go to[**System**]–> [**Sub-Menu**] to open the page.



Module Function: To save and reorder the sub-menu catagories.

Add

Click [Add] to open the sub-menu add page.

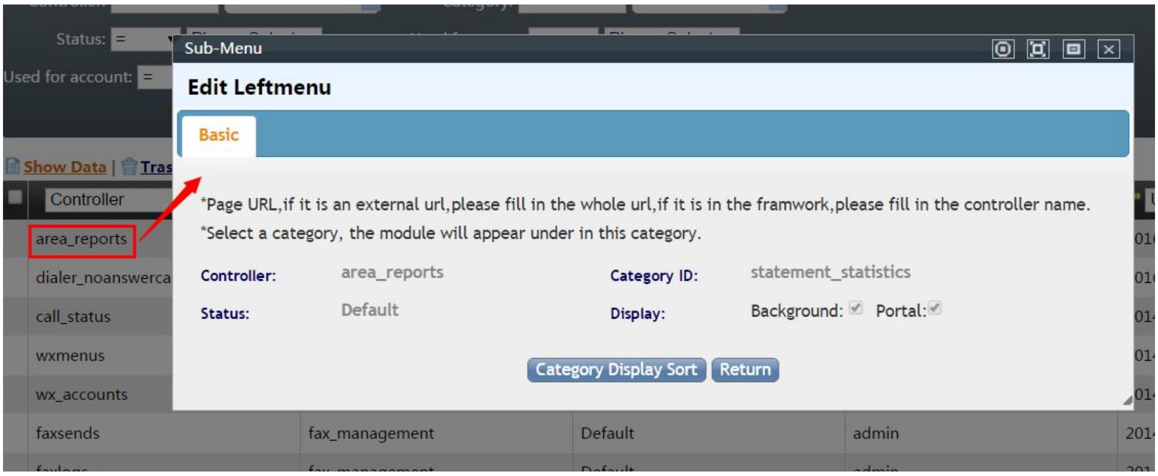


*Page URL,if it is an external url,please fill in the whole url,if it is in the framwork,please fill in the controller name.

*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.



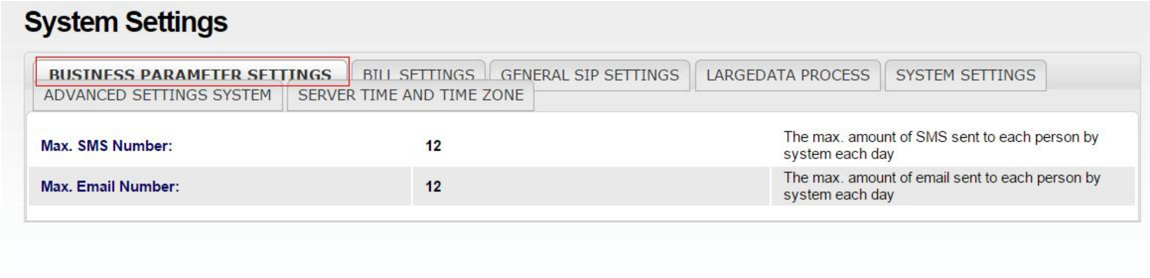
The gray field is uneditable while the black field is editable.
Click【Category Display Sort】to open the bellow page:

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

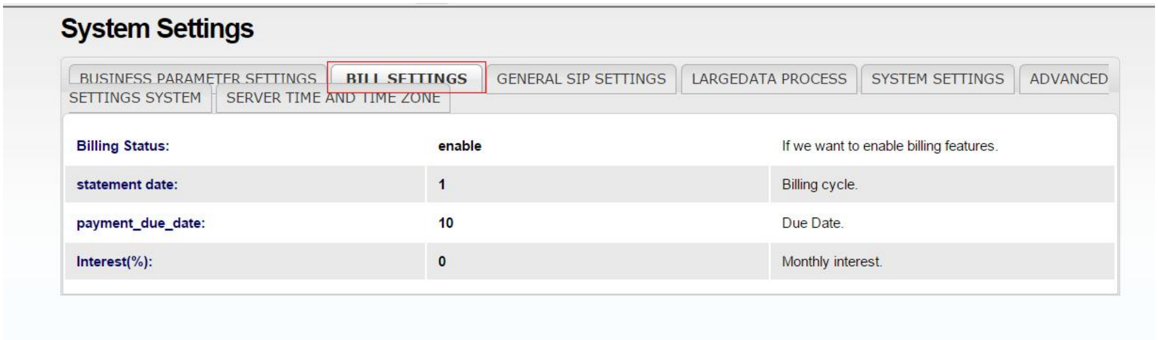


Max.SMS Number: The max number of SMS sends to the same phone numbers daily.

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



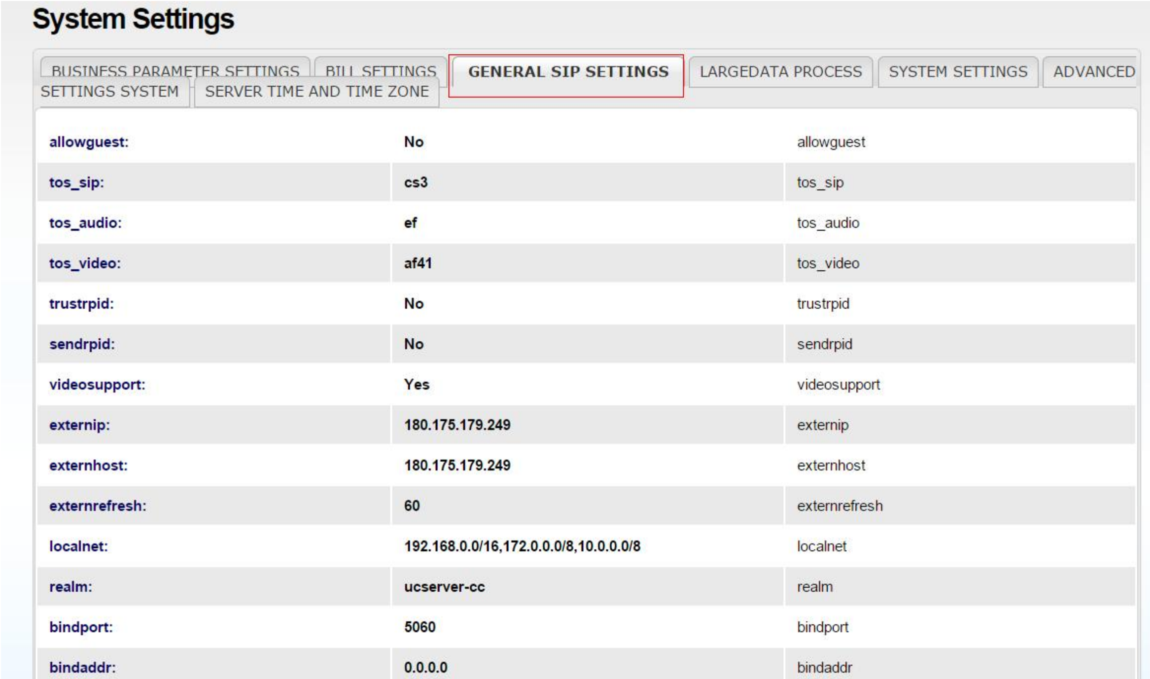
Bill Status: Whether to enable the billing features;

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



allowguest

tos_sip

tos_audio

tos_video

trustrpid

sendrpid

videosupport

externip

externhost

externrefresh

localnet

realm

bindport

bindaddr

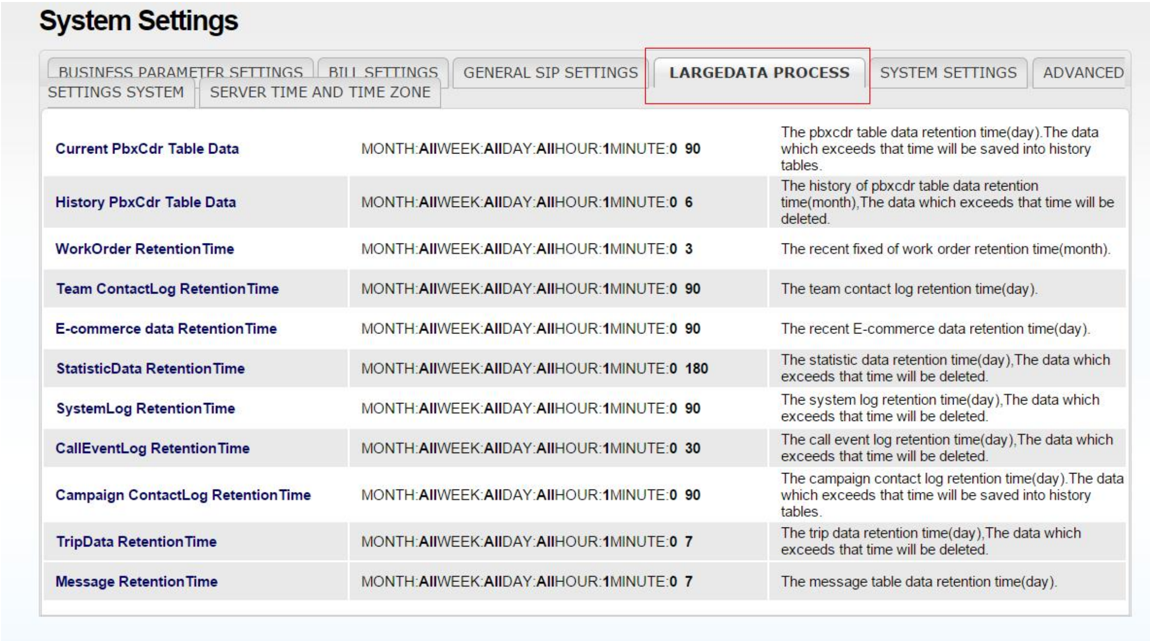
rtpkeepalive

rtptimeout

useragent

srvlookup

Large Data Process



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.

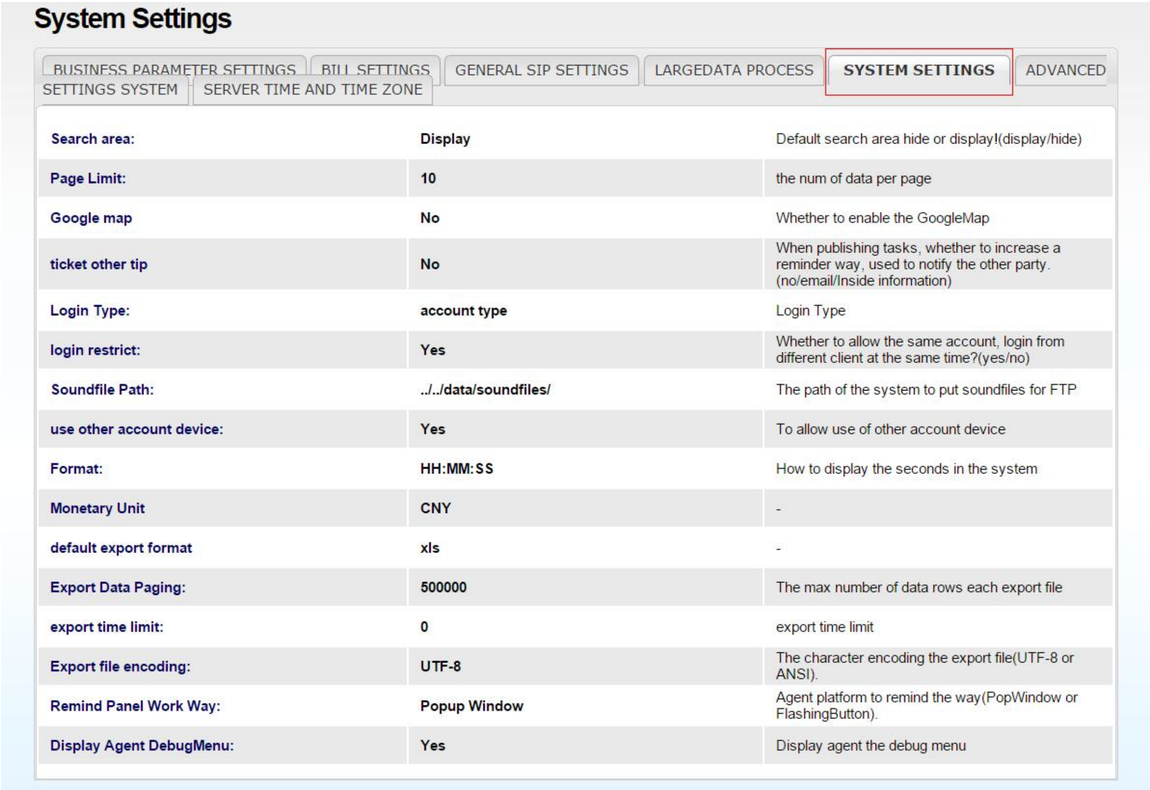
CallEventLog RetentionTime: The call event log retention time(day),The data which exceeds that time will be deleted.

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



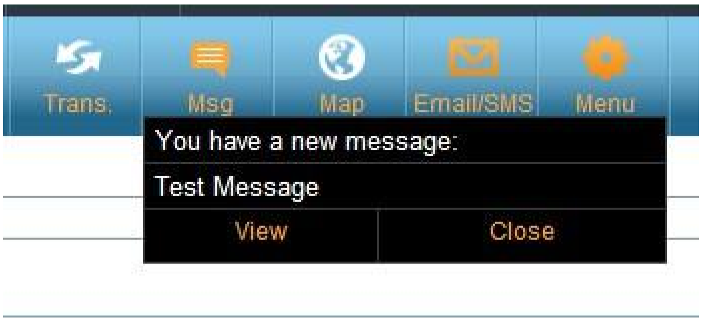
System Settings

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

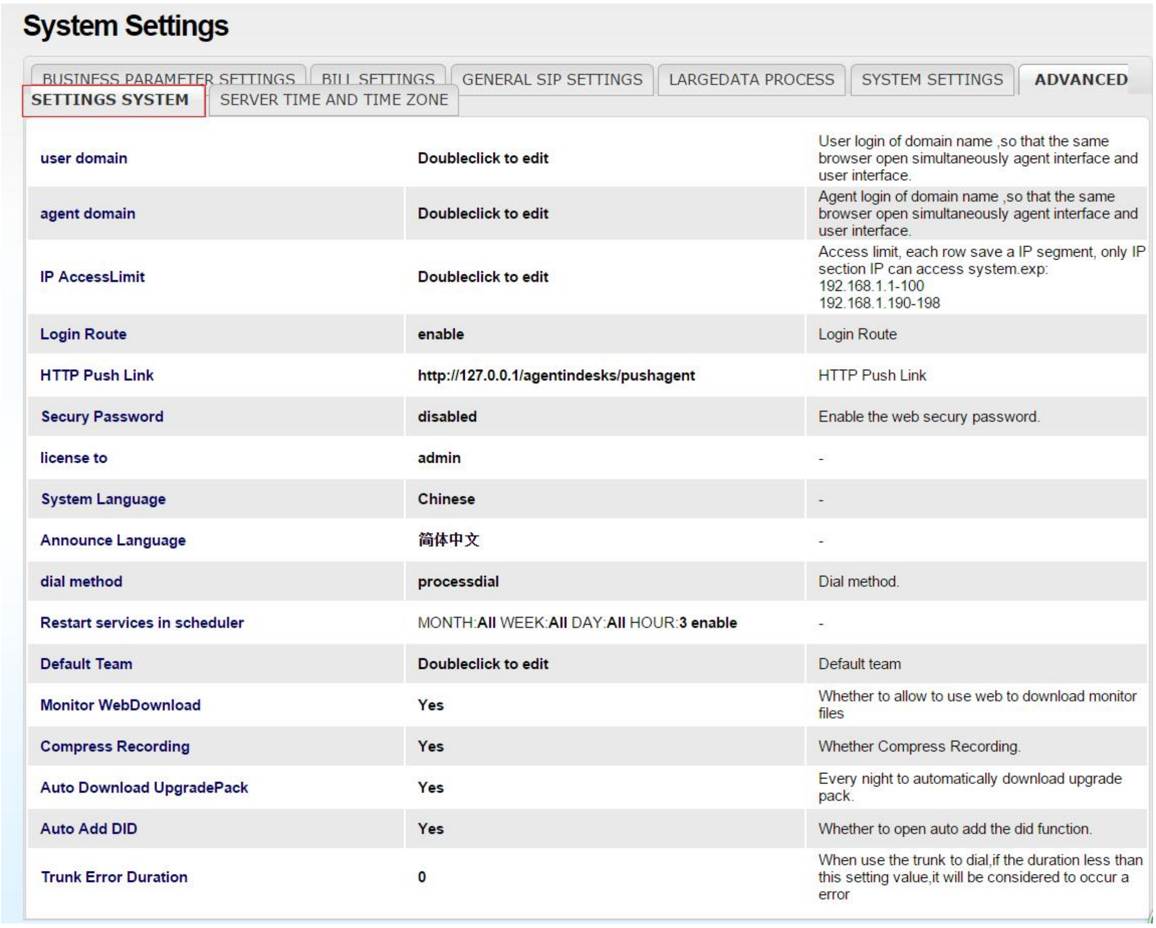
Search area: Default search area hide or display!(display/hide)
Page Limit: the num of data per page
Google map: Whether to enable the GoogleMap
ticket other tip: When publishing tasks, whether to increase a reminder way, used to notify the other party.(no/email/Inside information)
Login Type: Login 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:



- Flah button ： If set flash button, when new message comes, the agent will see

Advanced Settings System



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 secury 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 logoin 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

Secury Password: Enable the web secury password.

license to: Whom to give the license to

System Language: The default system logoin 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

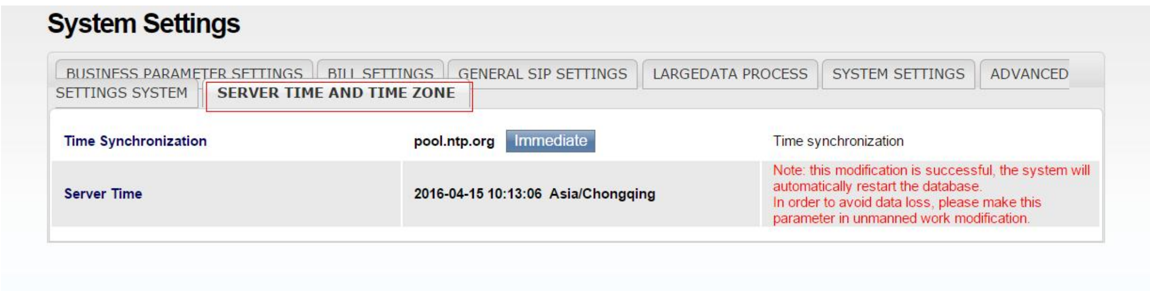
Compress Recording: Whether Compress Recording.

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

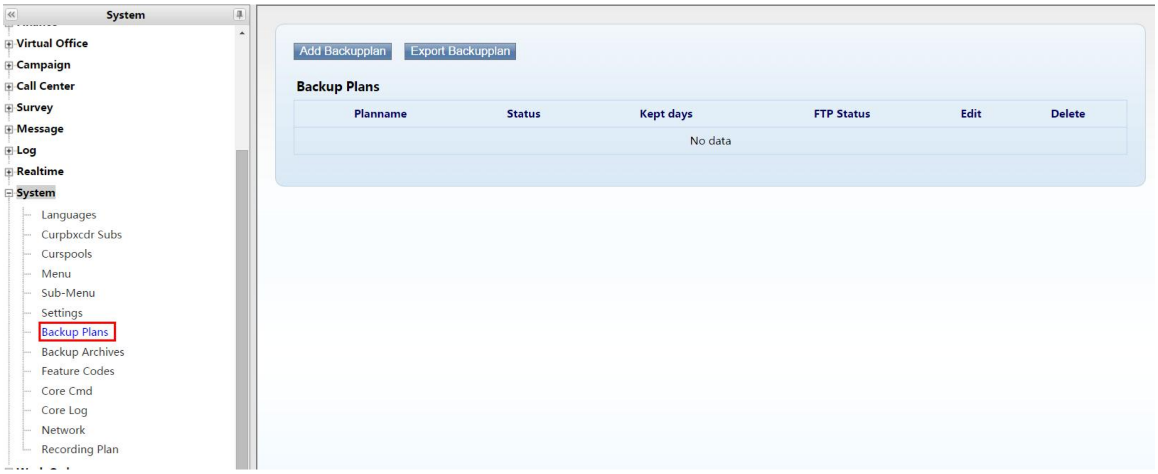


Time Synchronization: Time synchronization

Server Time: The current server time

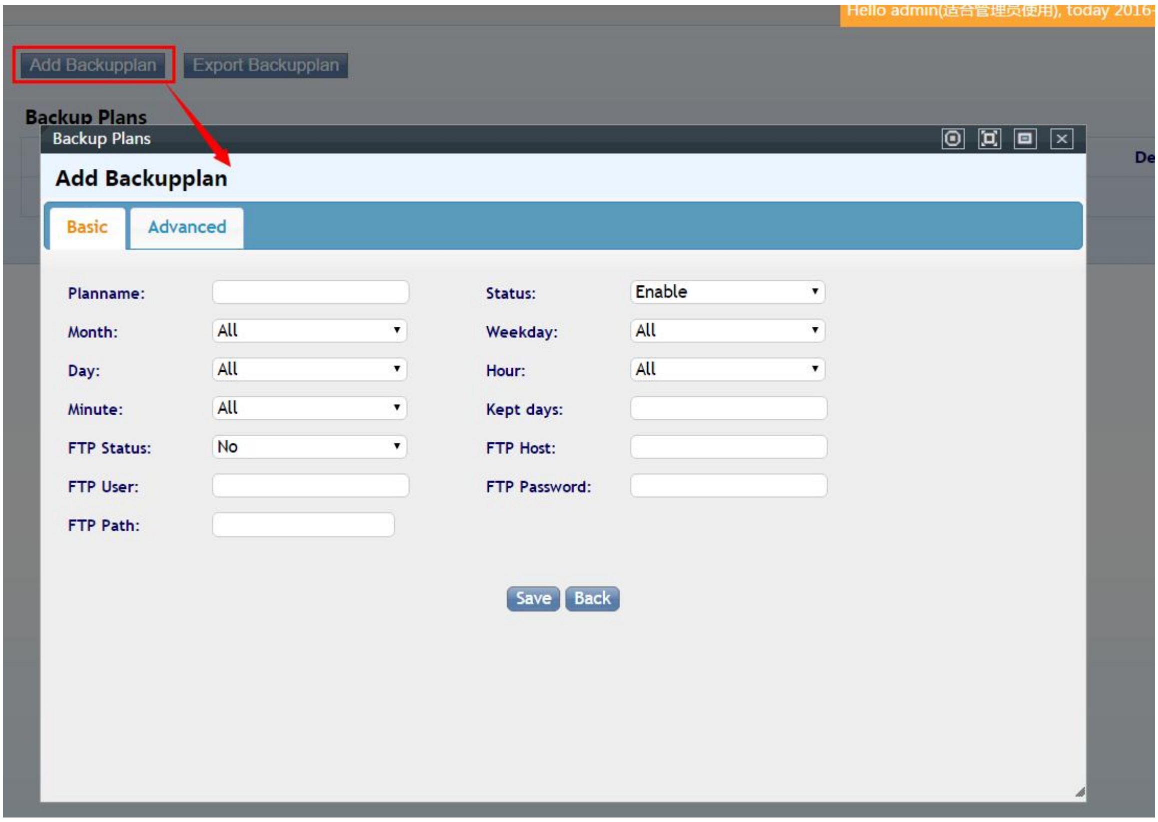
15.7 Backup Plans

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

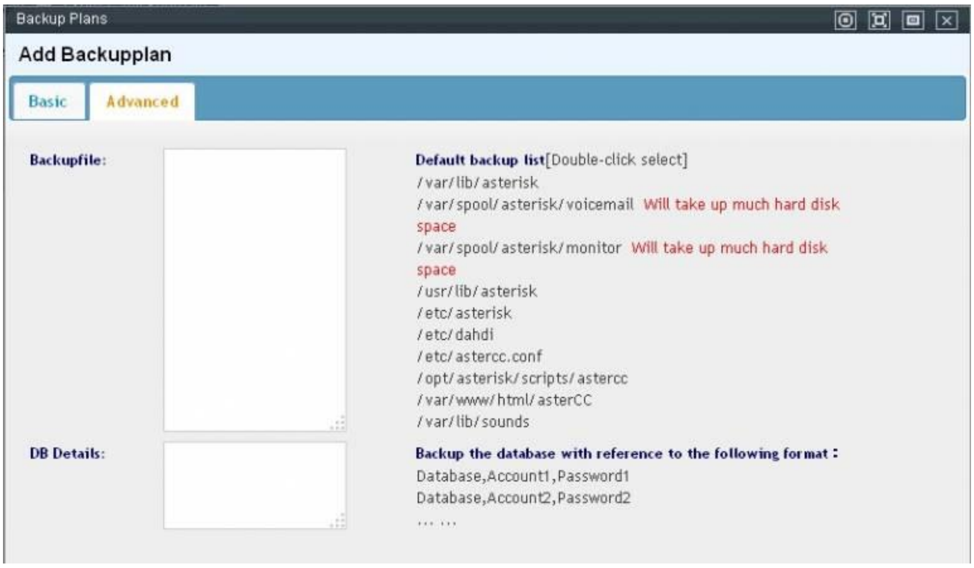
Kept Days：How many days to keep this backup file in the server.

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.

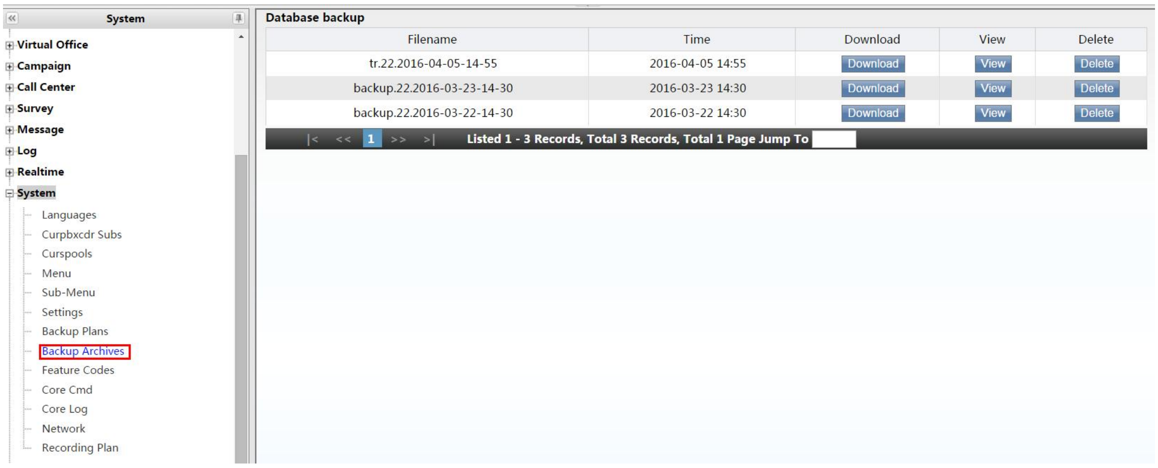


Backupfile：It list the key system file path, please double click it to add to the Backupfile box.

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.



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）

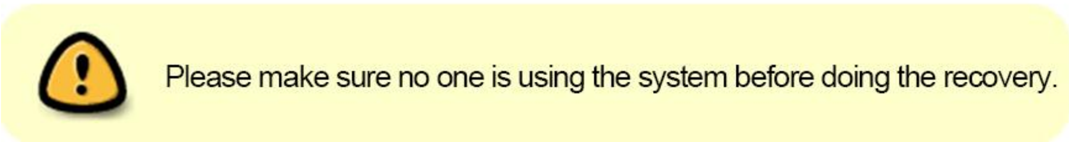
Click【Fresh】 button,the system will backup the file regularly according to your settings. You can delete,view,and download the backup file list on the page.Only when the backup file with the same version of system will the【Recorvery】 button clickable.)

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 relogoin the system after 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.

Default 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.

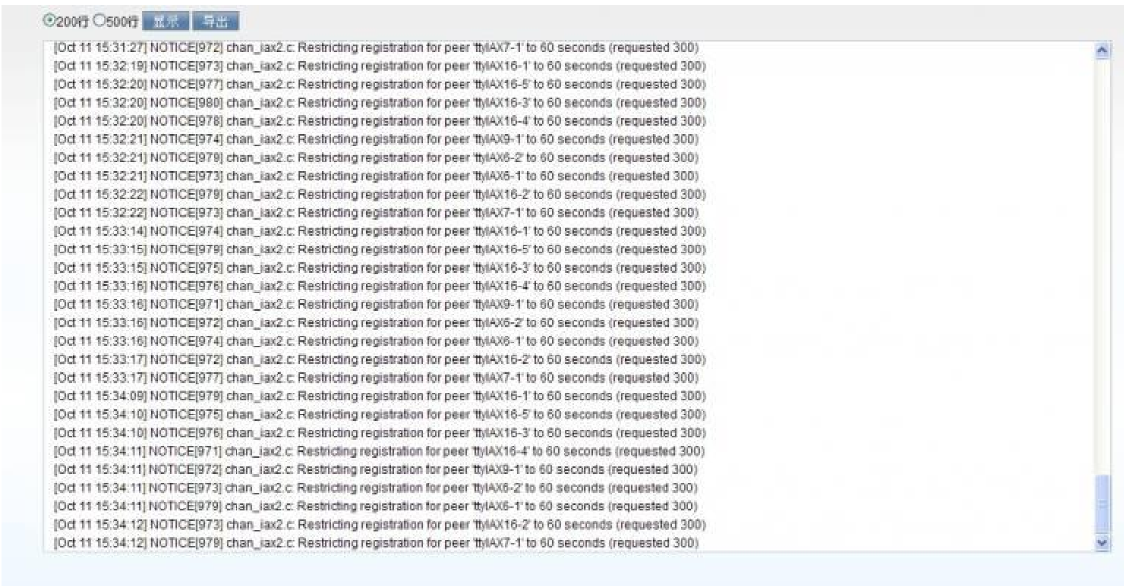
If change【Blind Transfer】and【Consult to Agent】, you need to apply the changes.

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"

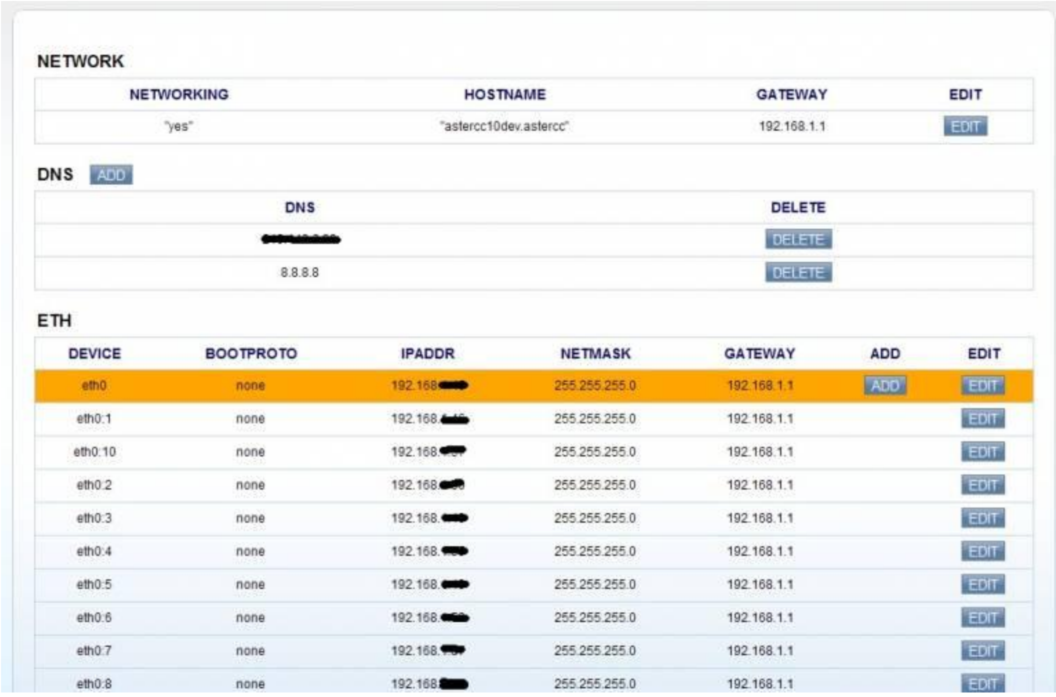
15.11 Core Log



On this page,you can use this page to view system kernel related log.

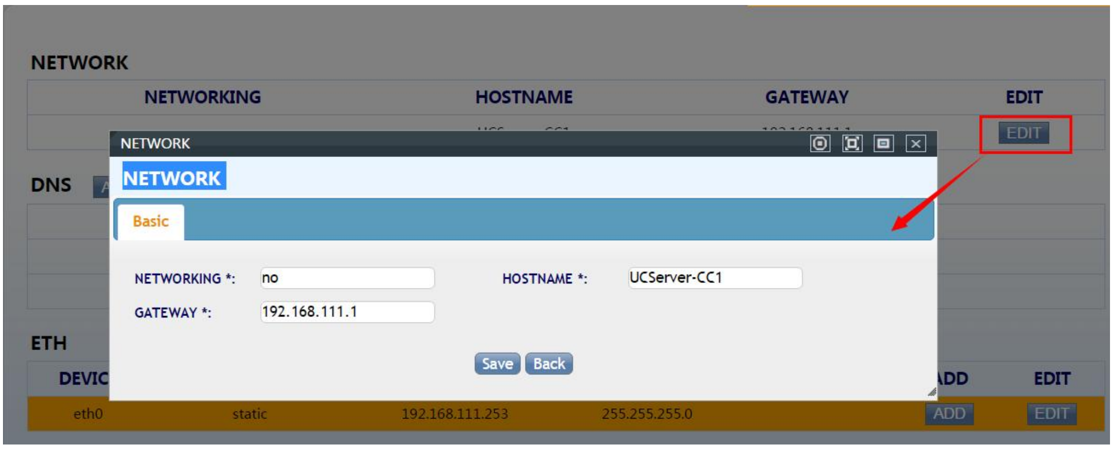
15.12 Network

Function: configure the system network



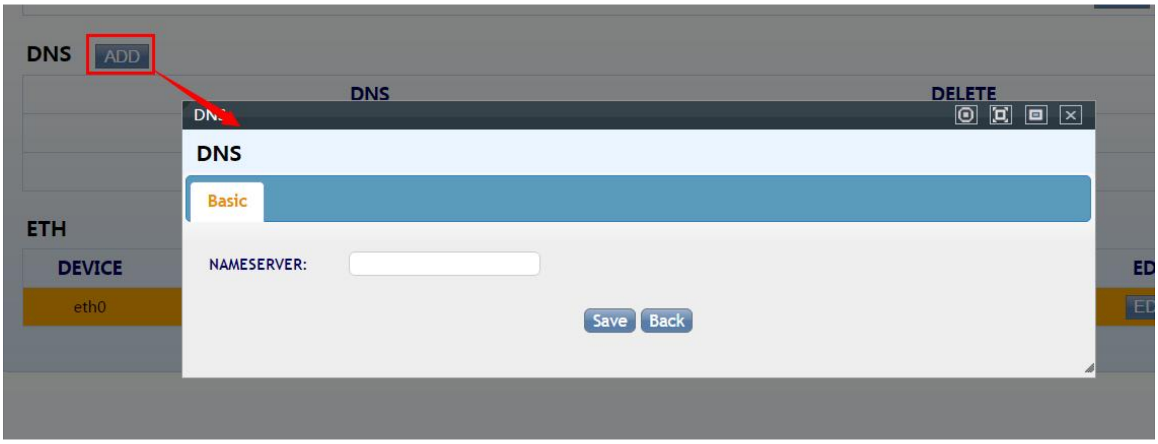
NETWORK

Can edit the NETWORK's parameter



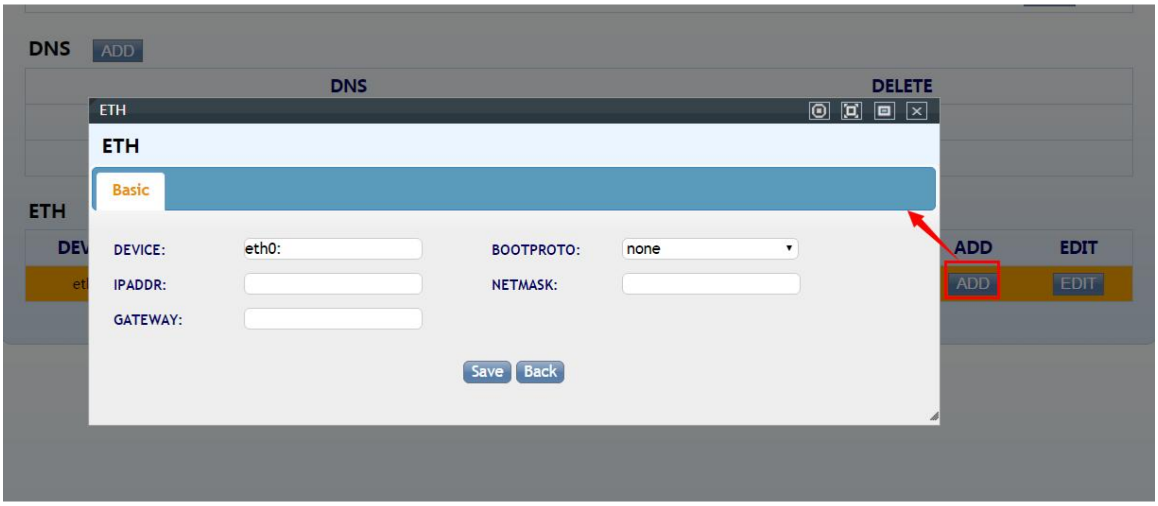
DNS

Click ADD button behide the DNS to add the DNS for system

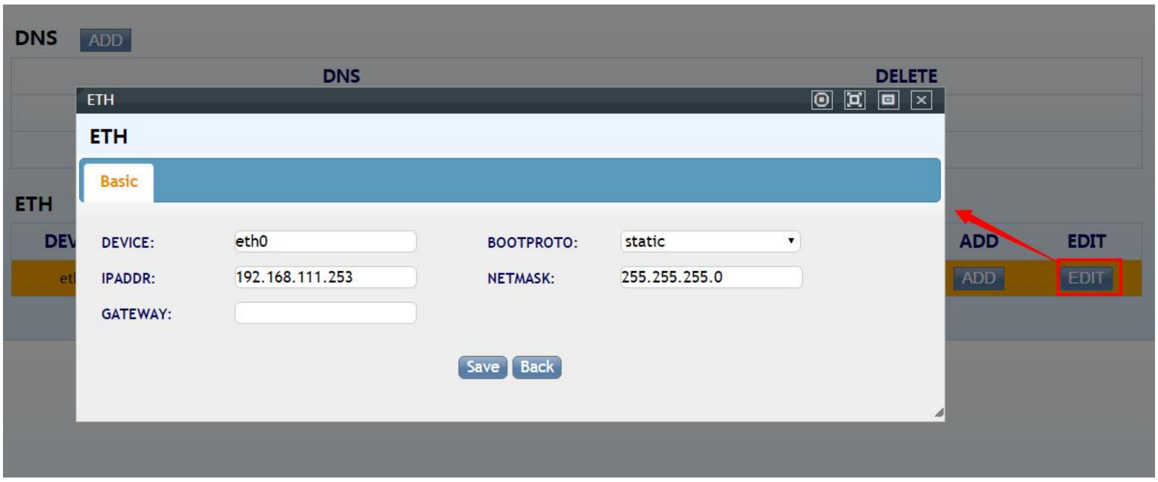


ETH

Add sub ETH for eth0

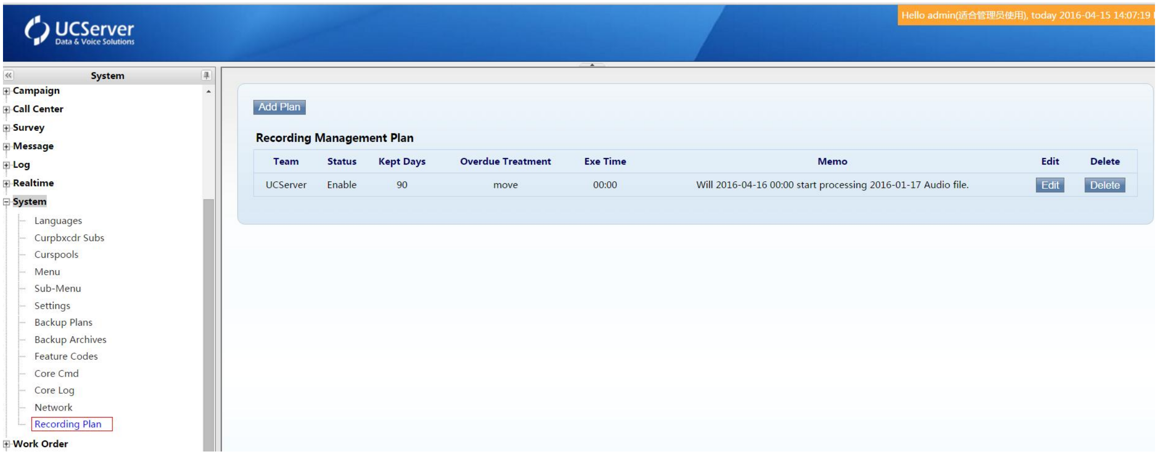


Can edit the ETH parameters



15.13 Recording Plan

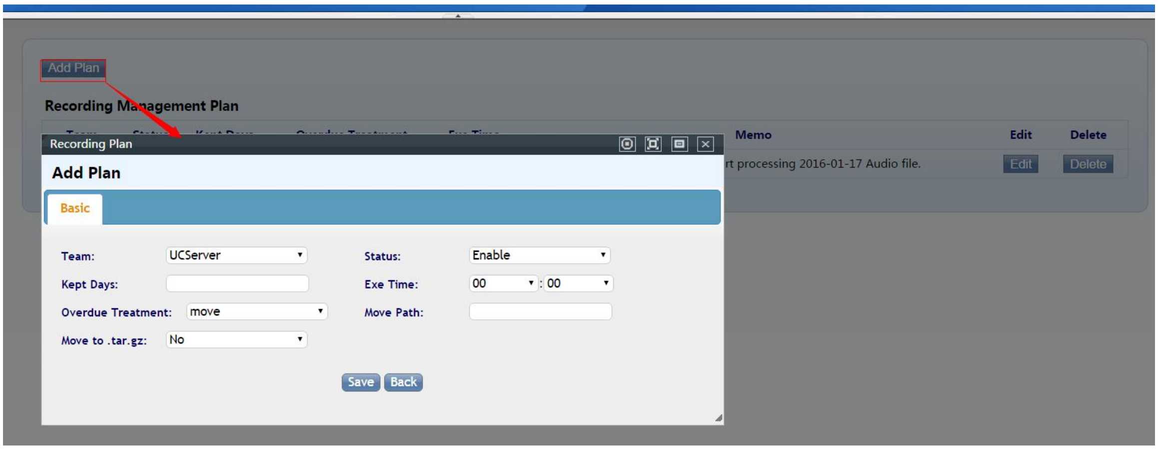
On the left menu, please go to[**System**]–> [**Recording Plan**] to open the page.



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 meno "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.

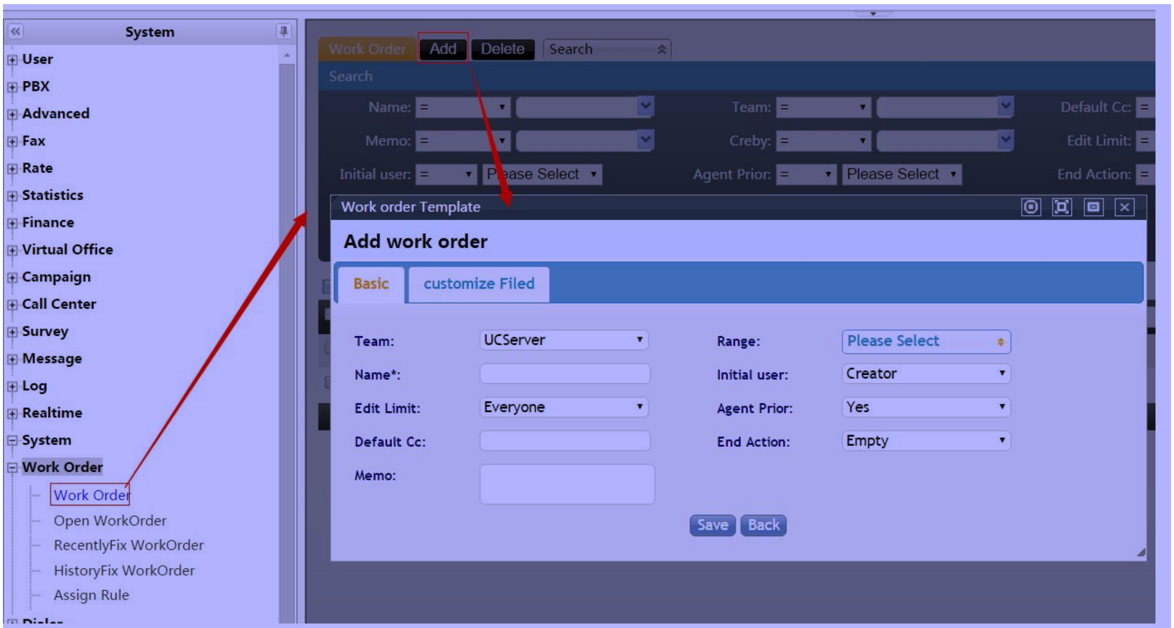
So how to create a work order? Let's start with a e-commerce company to show you how to use work order to manage the work.

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

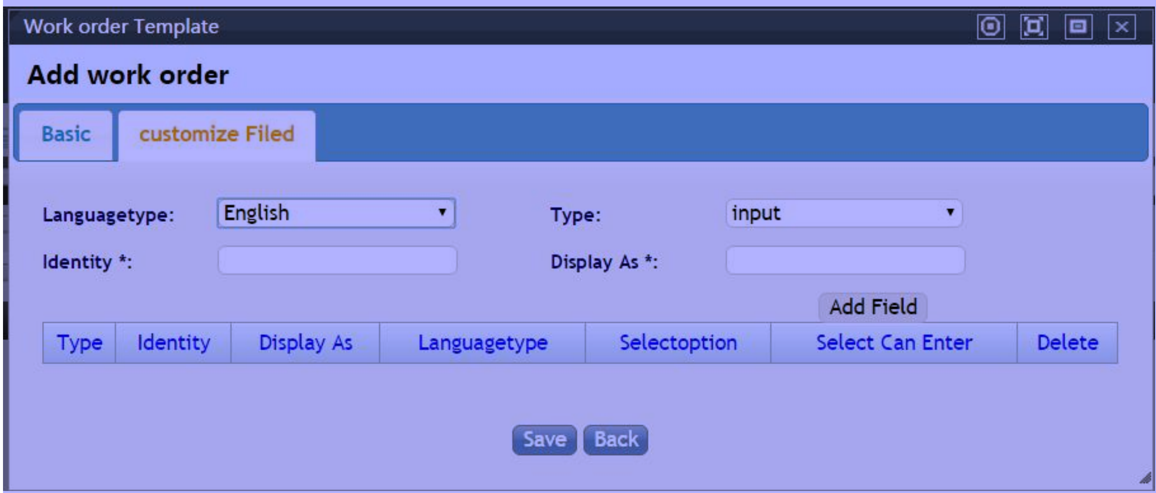


- **Team Name**: Define which team this work order belongs to
- **Range**: Define the agent groups which could process this work order (invalid if you configured work flow)
- **Name**: Put a name for this kind of work order, such as "Complain", "Sales"
- **Initial user**: When the work order is created, 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 byassign_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

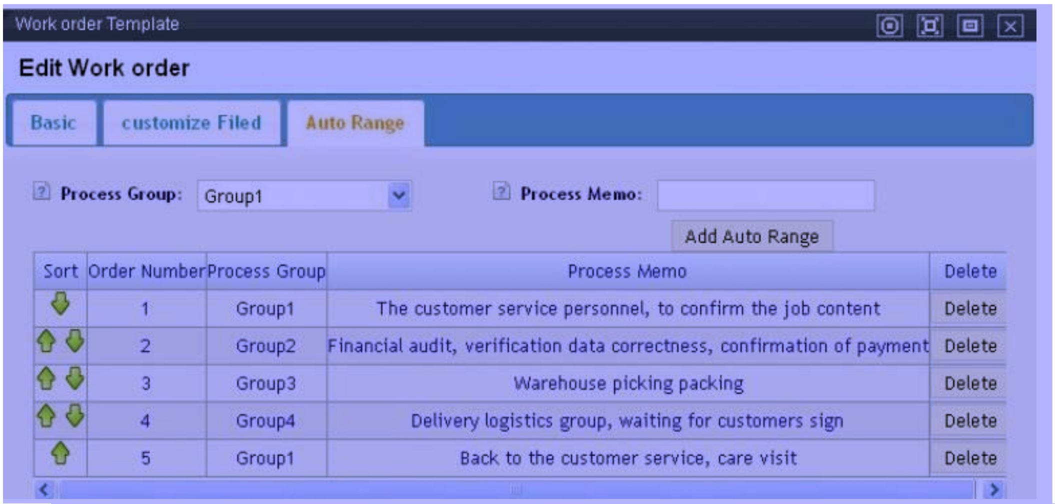
We can define customized filed for a work order to meet some specific needs.



- **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.

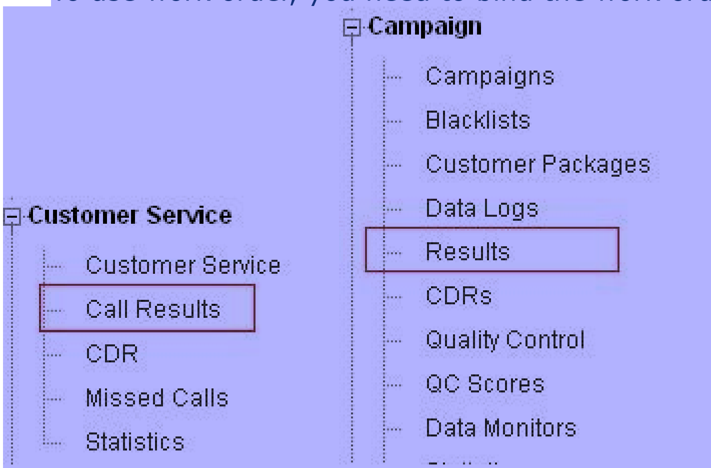


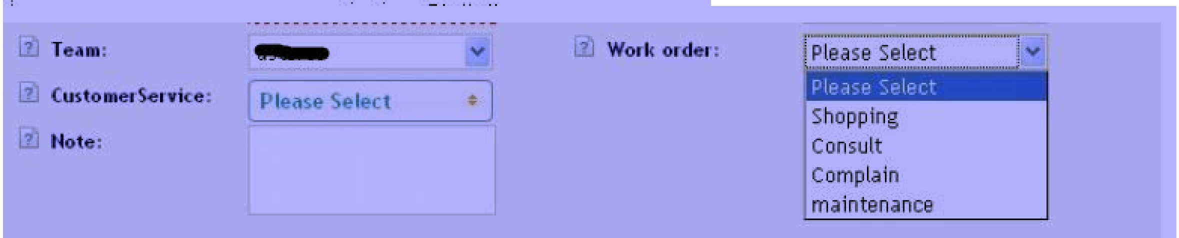
- As in the diagram, the work order will go from group1 to group5, and no matter which group creates the work order, it will always go to group1, then other groups according to priority.
- When the it's done in group5, the work order status will become "Done"

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



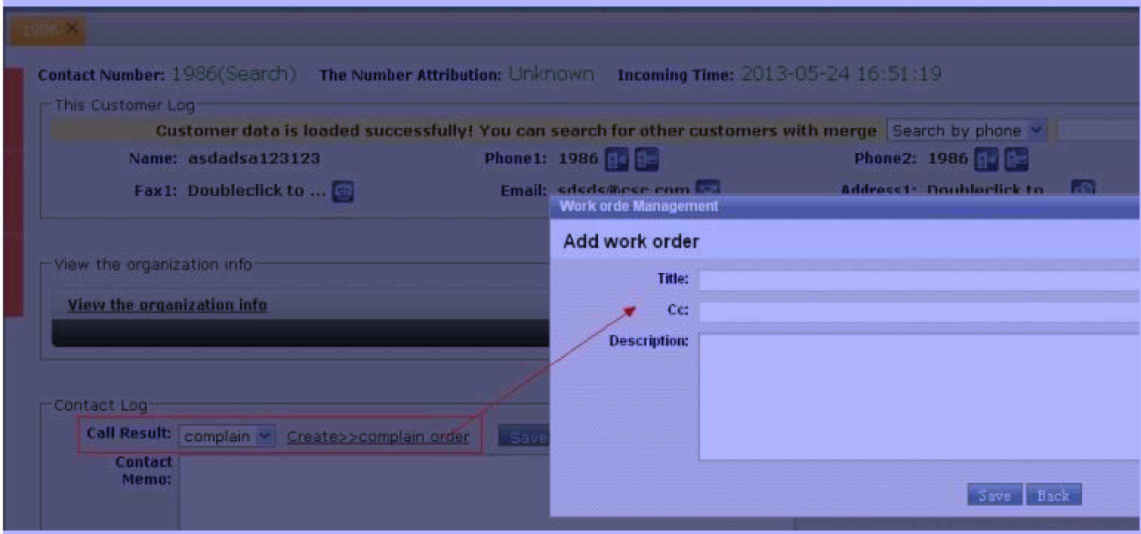


- When work order in bind, when selecting the call result for a call, you will see the link to create a work order

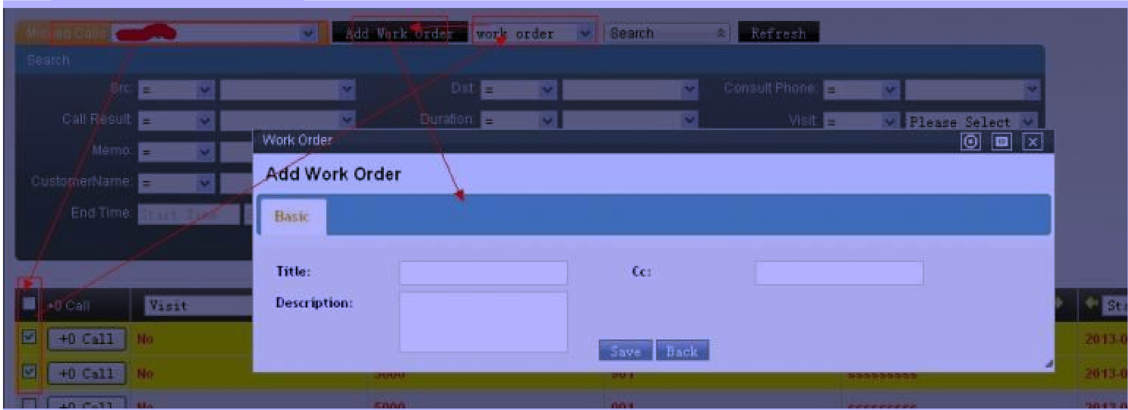
FAQ: Where I can create a new work order?

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)

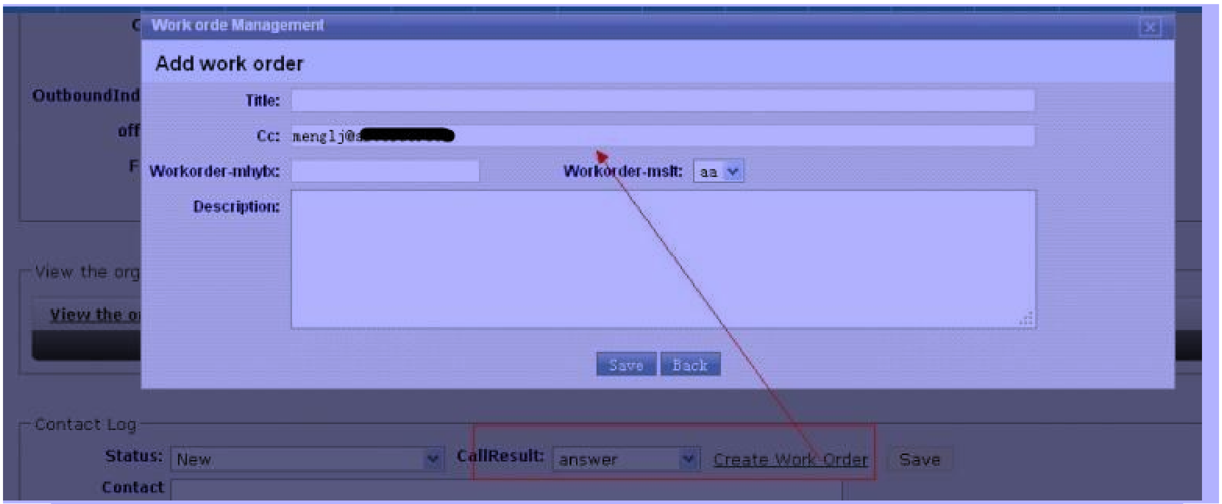


- Missed Calls page

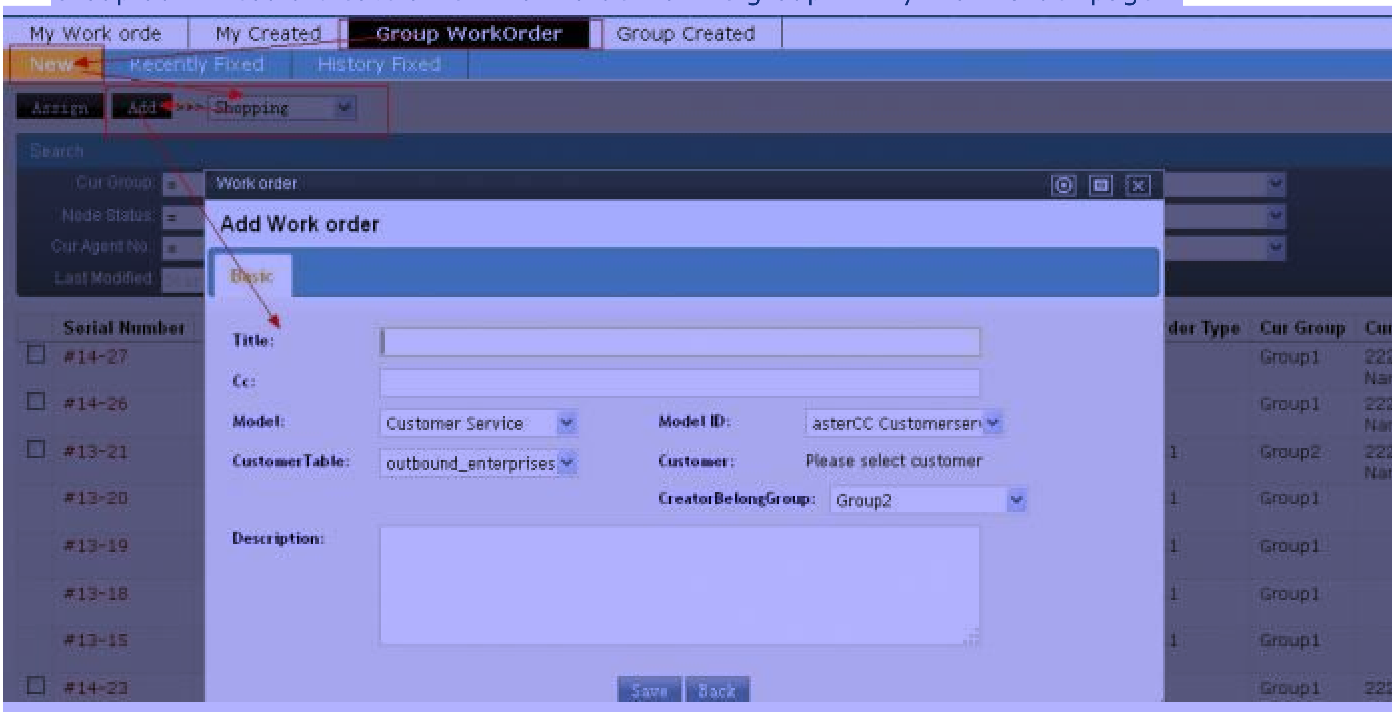


Missed call means when calls reach a queue, but the caller hangup before he talks to any agent, this calls will go to missed call list
Admin could create a special work order for such callers, don't miss any customers :)

- 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

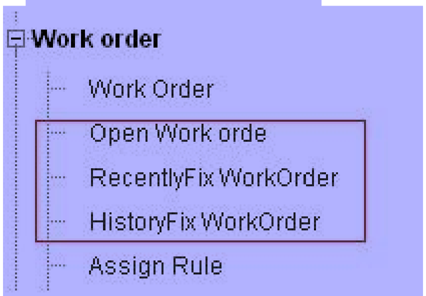
- When group admin create a work order, there're extra fields
- **Model**: Select Campaign or Customer Service

- **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

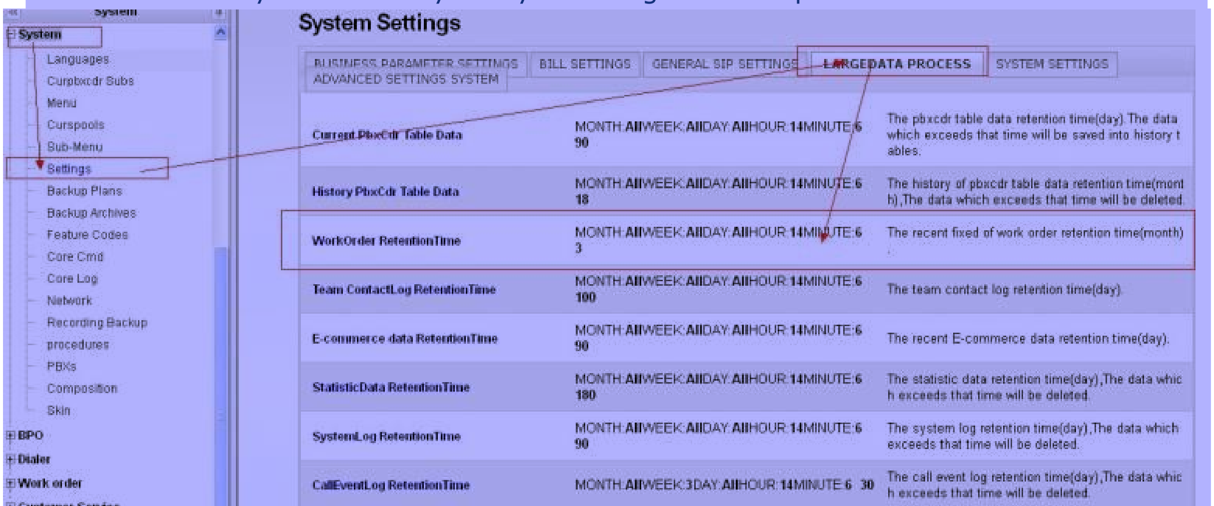
Every time when a work order template is created, system will create three new tables for it: unfinished, recently finished, history finished.

Admin could go to "Open Workorder" (unfinished), "RecentlyFix WorkOrder" and "HistoryFix WorkOrder" to check

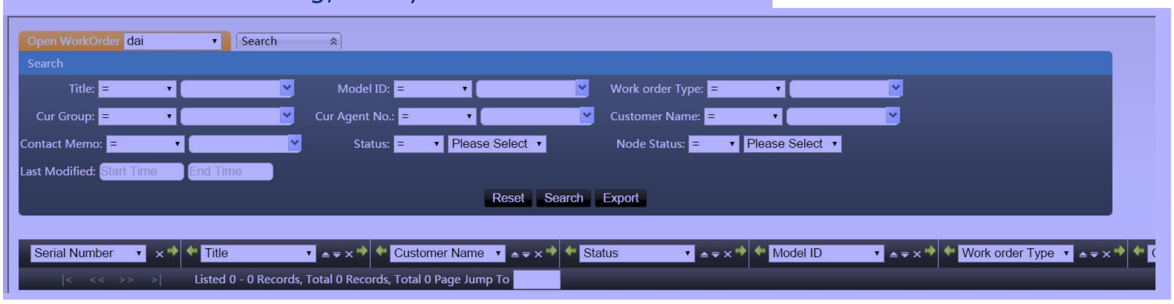


A new work order will go to "Open" automatically, when it's closed, it will go to "RecentlyFix" table.

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.



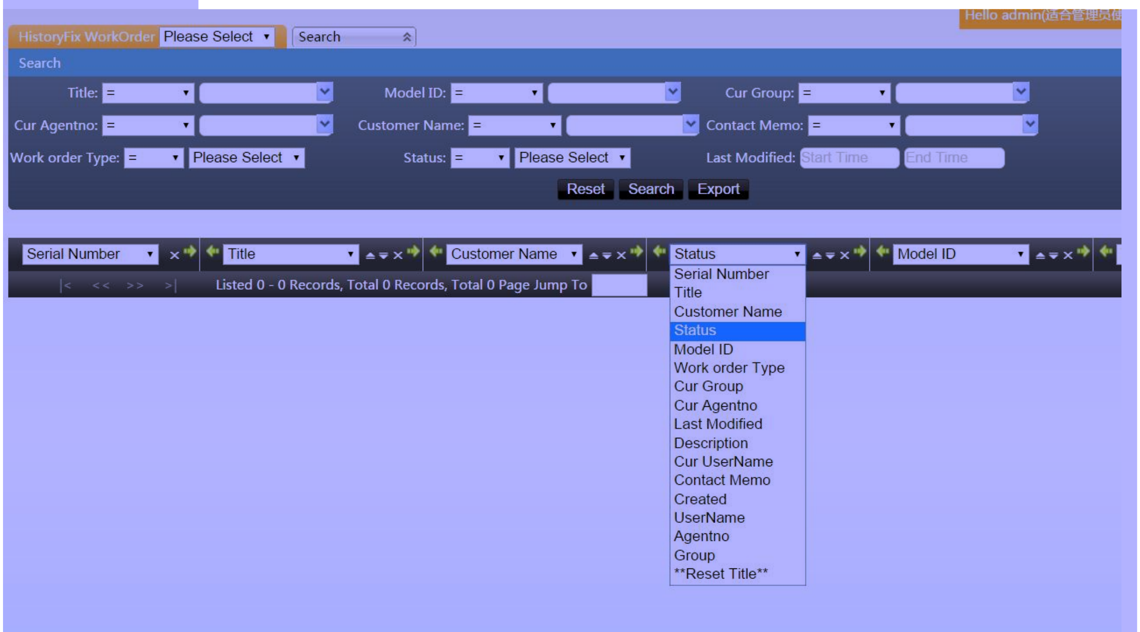
To check work order log, first you need to select a team



Double click the work order, you can open it, for all work orders, finished or not, you can not change it

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



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

16.2Assign Rule

Please read [**work_order**] first before you start.

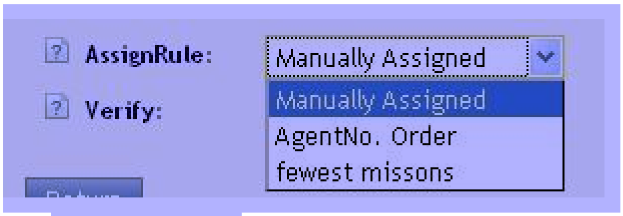
When a work order template is created, it will create a "assign rule" fro all groups in the work order, then group admin could change this rule.

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

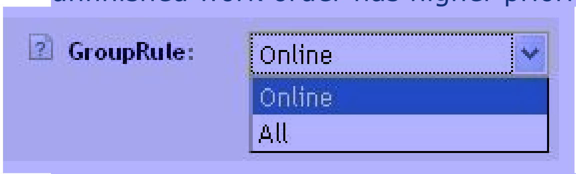
These rules tell system, when there's a new work order in the group, how does the system assign them to agent. When agent finish his work, if it's mandatory to approve by group admin, these rules is only editable for group admin, nobody else could change even for system admin.

Parameters

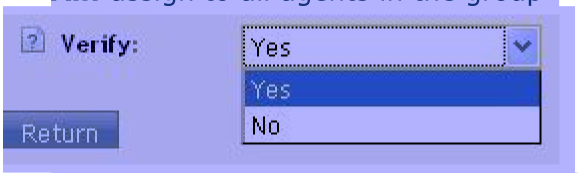
> Assign Rule is only editable for group admin



- **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



- **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

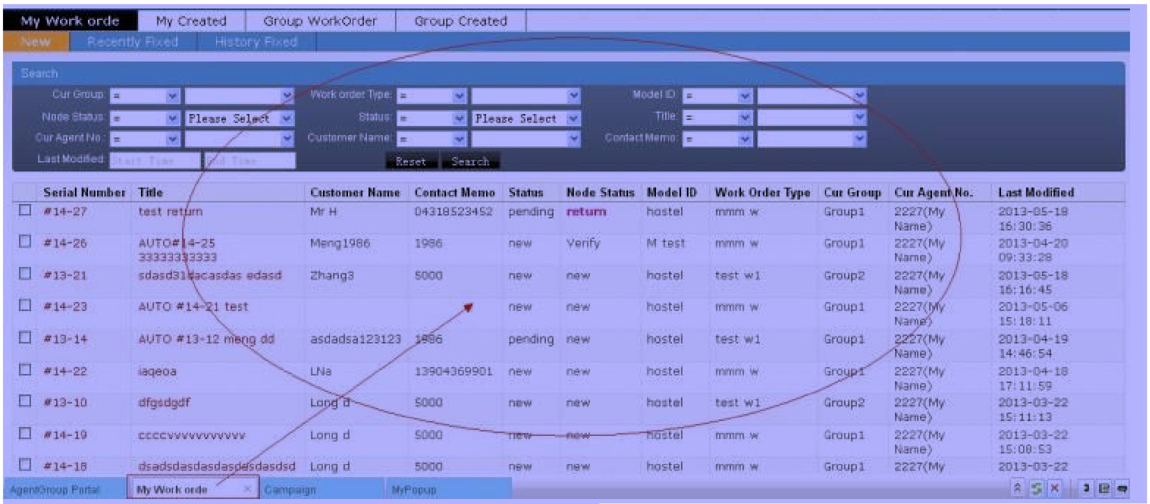


- **Verify**: When the work order is done by agent, if it requires group admin to verify to continue
- **Yes**: Need verify by group admin, if it's not pass, the work order will return to the agent
- **NO**: Don't need verify

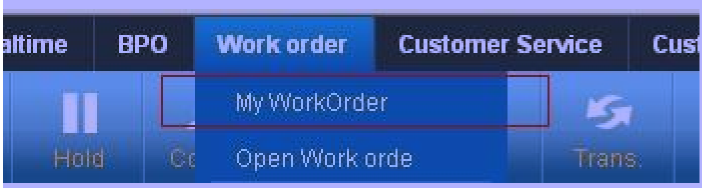
16.3My Work Order

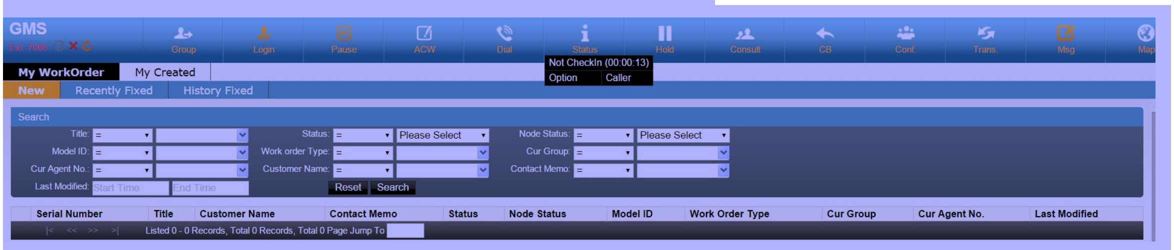
Please logo in as agent to check My Work Order.

When an agent has unfinished work order, when they login, system will open “My Work Order” page.



You can also open the page from the menu





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

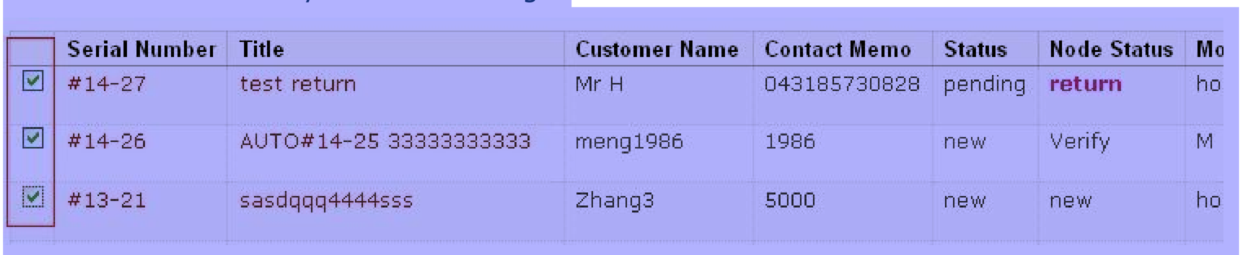
Double click the work order, check detail. **Edit Limit** in [**work_order**] decide if the agent has edit access. If the status is done, no body could change anymore.

Assign

Group admin is able to assign or re-assign work orders

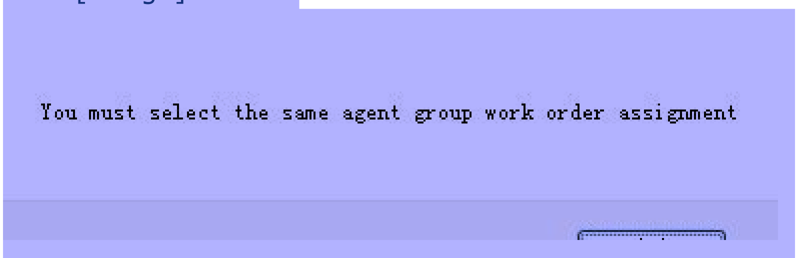
Serial Number	Title	Customer Name	Contact Memo	Status	Node Status	Model ID	Work Order Type	Cur Group	Cur Agent No.	Last Modified
#14-27	test return	Mr H	043185730828	pending	return	hostel	mmm w	Group1	2227(My Name)	2013-05-18 16:30:36
#14-26	AUTO#14-25 33333333333	meng1986	1986	new	Verify	M test	mmm w	Group1	2227(My Name)	2013-04-20 09:33:28
#13-21	sasdqqq4444sss	Zhang3	5000	new	new	hostel	test w1	Group2	2227(My Name)	2013-05-18 16:16:45
#13-20	dc2wacacv	Zhang3	5000	new	new	hostel	test w1	Group1		2013-05-15 16:10:38
#13-19	AUTO#13-16 test2	shixb	5000	new	new	hostel	test w1	Group1		2013-05-14 16:31:29
#13-18	AUTO#13-17	shixb	5000	new	new	hostel	test w1	Group1		2013-05-14 16:31:13
#13-15	test workorder	shixb	5000	new	new	hostel	test w1	Group1		2013-05-14 16:07:16
#14-23	AUTO #14-21 ok dddw			new	new	hostel	mmm w	Group1	2227(My	2013-05-06

Select the work order you want to assign

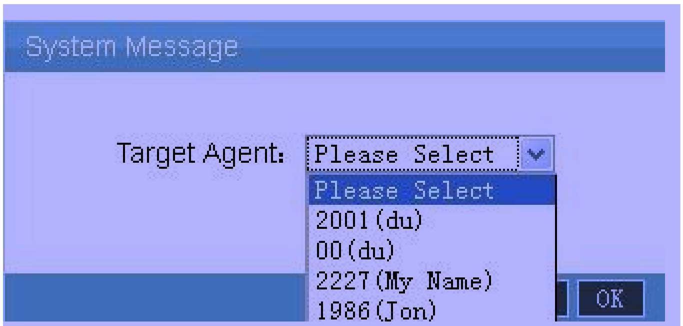


Serial Number	Title	Customer Name	Contact Memo	Status	Node Status	Mo
#14-27	test return	Mr H	043185730828	pending	return	ho
#14-26	AUTO#14-25 33333333333	meng1986	1986	new	Verify	M
#13-21	sasdqqq4444sss	Zhang3	5000	new	new	ho

Click [Assign] button



You can't assign work orders together when they are not in same group



select an agent, assign the work orders you selected

Why there're no check boxes for some work orders?

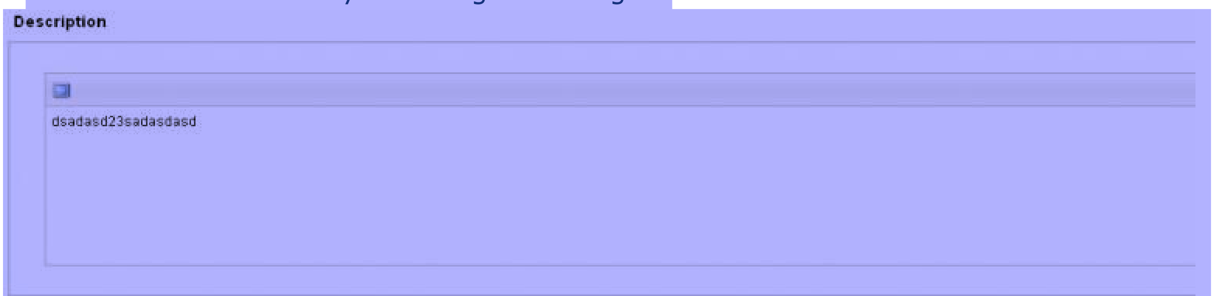
If it's configured auto flow in the work order, and it's waiting for assign by system, group admin is able to re-assign when it's finish

Work Order Detail

Double click in work order list, you can see all the information of the work order.

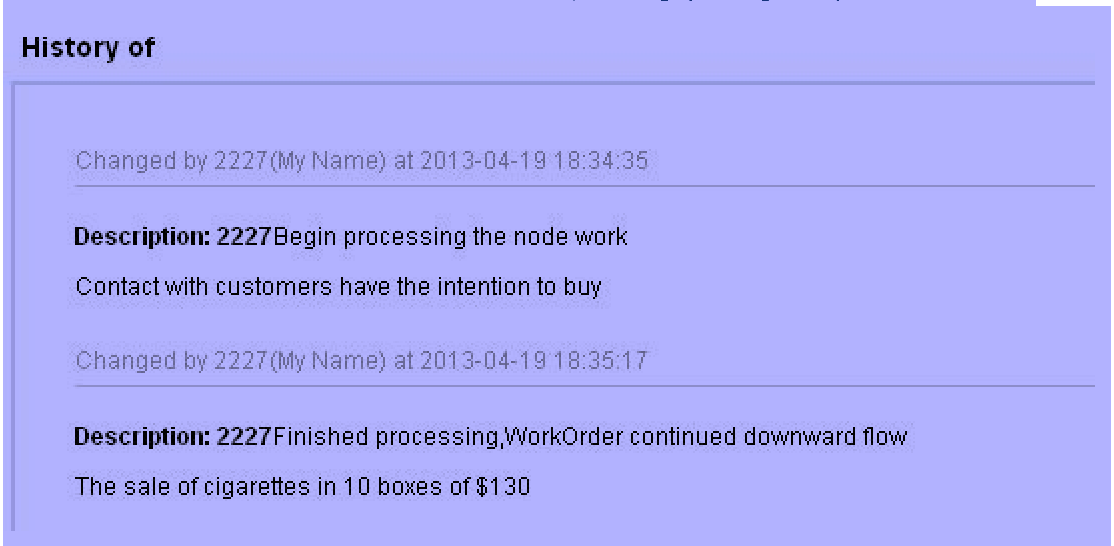
First you will see work order information and customer information, double click the **bold text** to edit, grey text means read-only

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

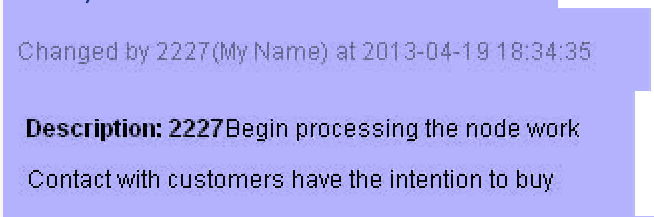


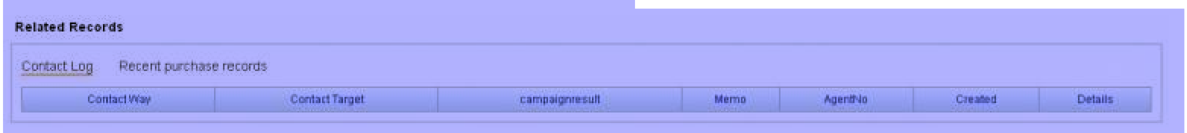
The description when the work order is created, read-only

It will list all attachment of the work order, click [upload] to upload new file

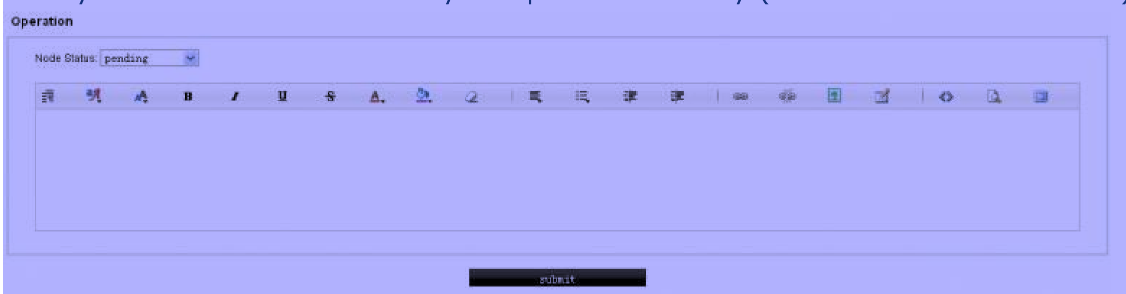


History shows all note of the work order





Here you can read contact history and purchase history (need e-commerce module)

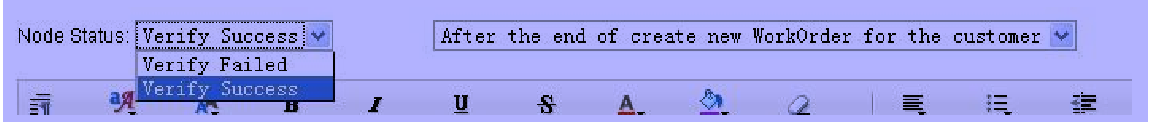


When agent edit a work order, besides the customization fields, he also need to put reply and change node status (node status is only editable by current owner and group admin)

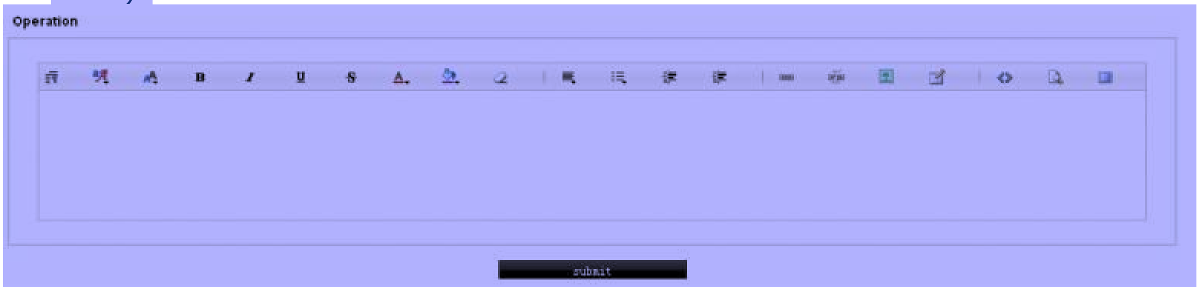
For node status, we have “pending”, “done”,”return to node”,”return to group”,”verified”,”denied”

- 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 hiden)



17 Dialer

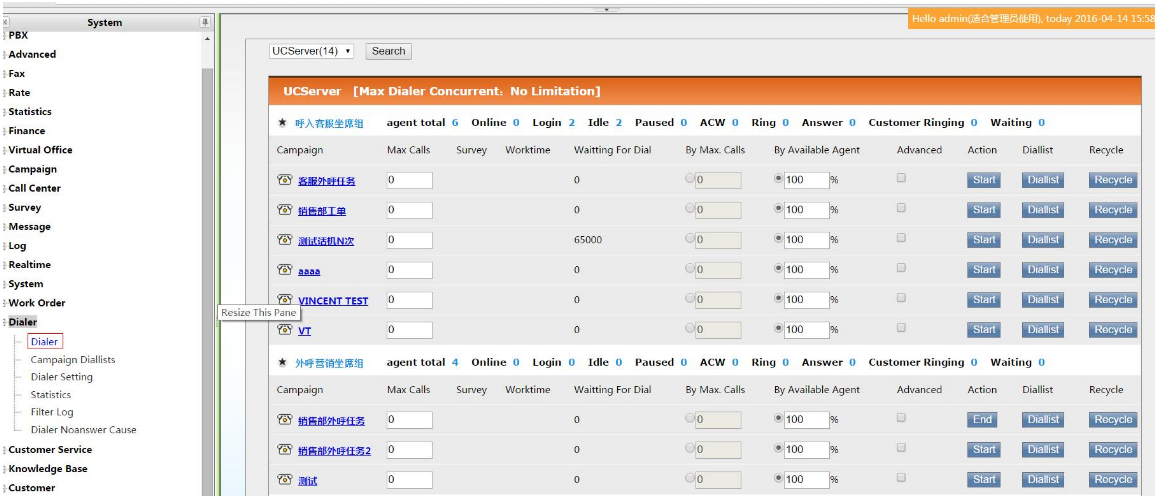
17.1Dialer

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.

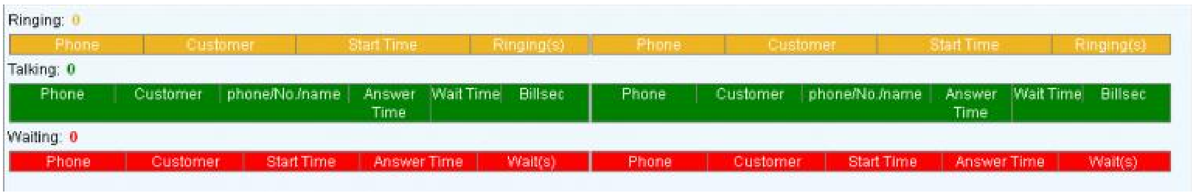
"VINA-PBX" is the name the system administrator set for this team.

"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: 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.)



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

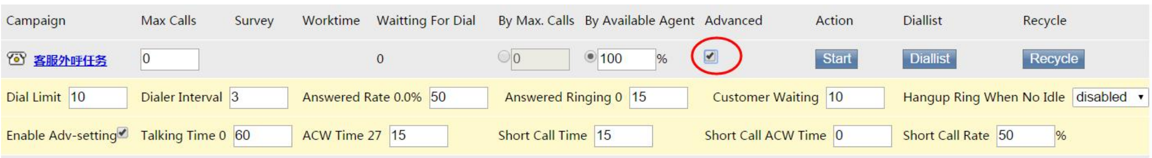
If your concurrent setting exceeds the above one, then the above one will be replaced by the new figure you have set.

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.



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 efficency 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*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≈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

Formula 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 ⇐ "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)
```

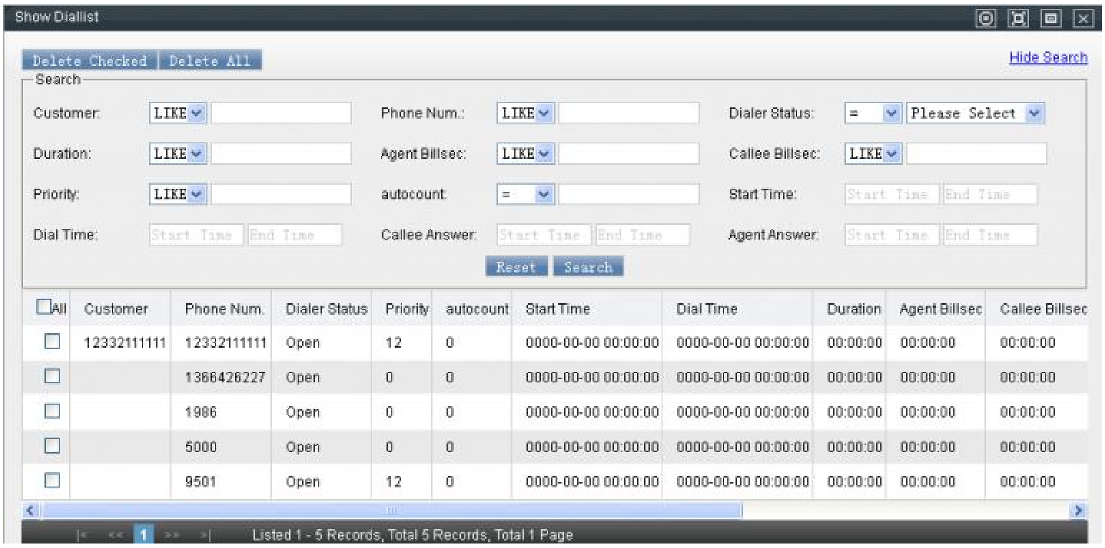
- Available Agents from long call = Current call duration is greater then short call time and greater than (Talking time + ACW time - Answered Ringing
- Valid ringing customers = (Current ringing ⇐ Answered Ringing) * Answered rate
- Valid waiting customers = Current waiting time < "Customer Waiting"

- **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

Dial list

From the dial list, it would list all numbers waiting in the list



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.

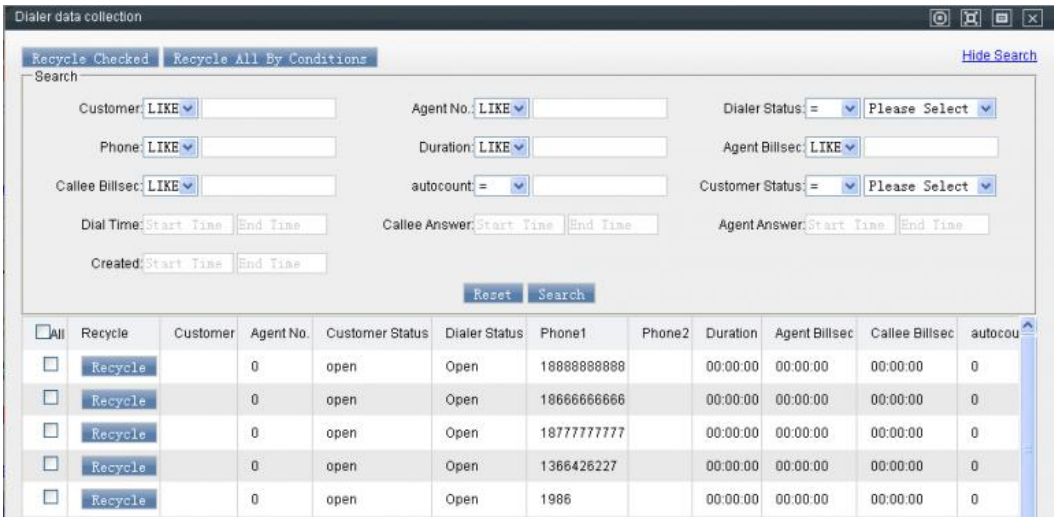
"Delete Checked": delete checked records from current page

"Delete All": delete all matched records from dial list

You can only delete when the status is open

Recycle

This function is used to copy the numbers from customer list to the predictive dialer list.



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.

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.

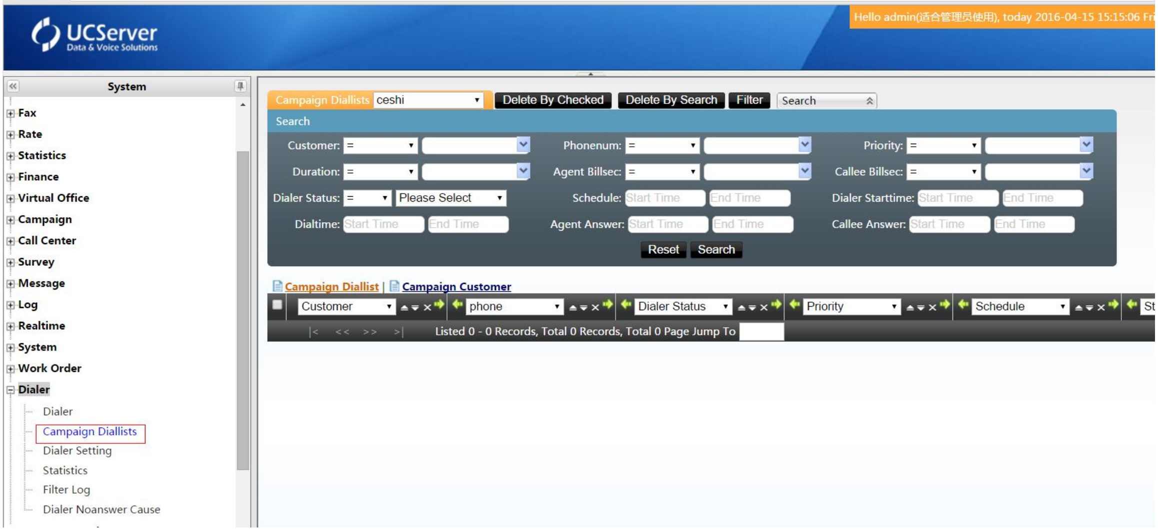
17.2Campaign Diallists

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 daillist, 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

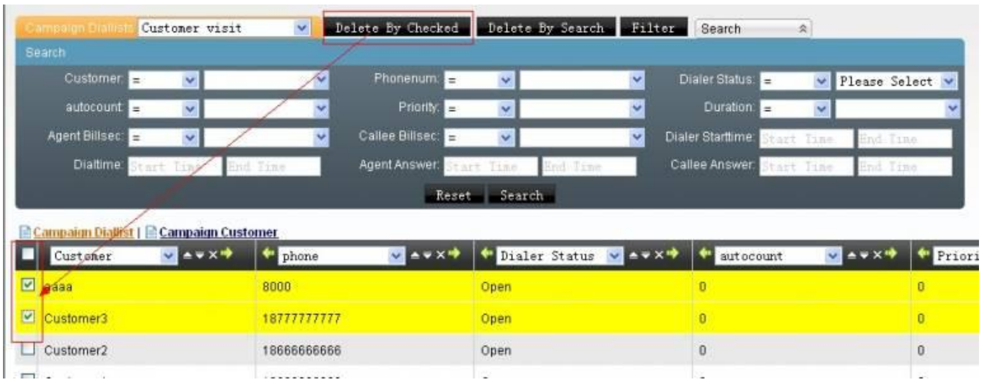
On the left menu, please go to[**Dial**]–> [**Campaign Diallists**] to open the page. Select a team from Campaign Diallist:



Once the dial plan enable and there are agents login, the system will dial the customers' numbers on the diallist automatically.

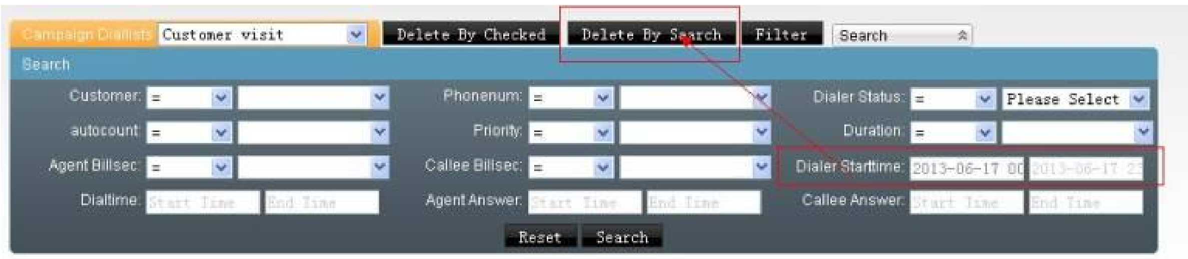
If there are numbers you don't want to dial out,you can delete them.

【Delete by Checked】: only a few data needs deleting



【Delete by Search】: huge data needs deleting

Please set the search conditions on bellow page. It suggests not deleting data more than 5000 at once.

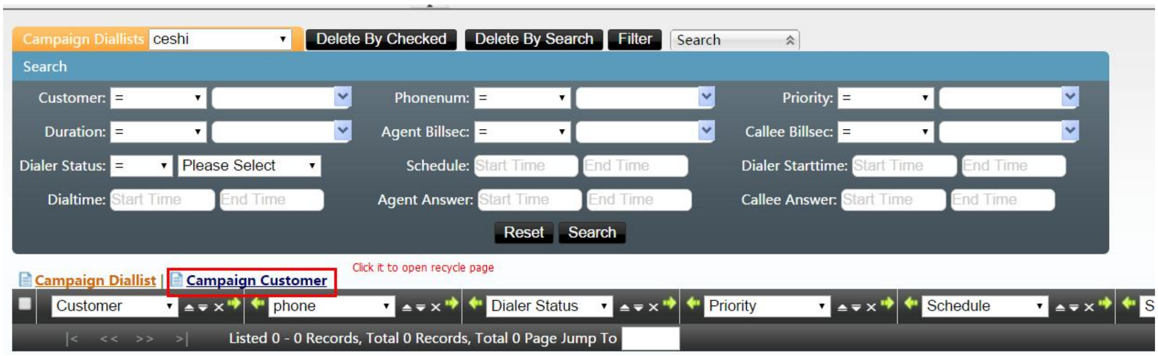


If no search condition, all the data will be deleted.

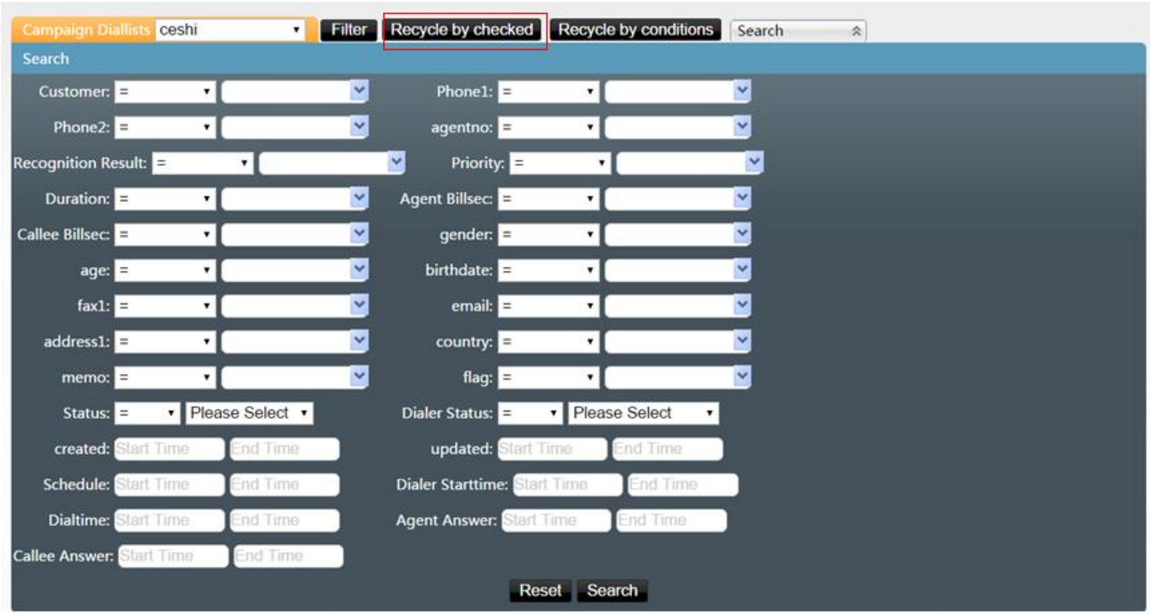
Note: Only those data stands by for dialing can be deleted. The resest date will be moved automatically.

Recycle

Click【Campaign Customer】to customer package, it shows all the date in the customer package. Please do recycling here.

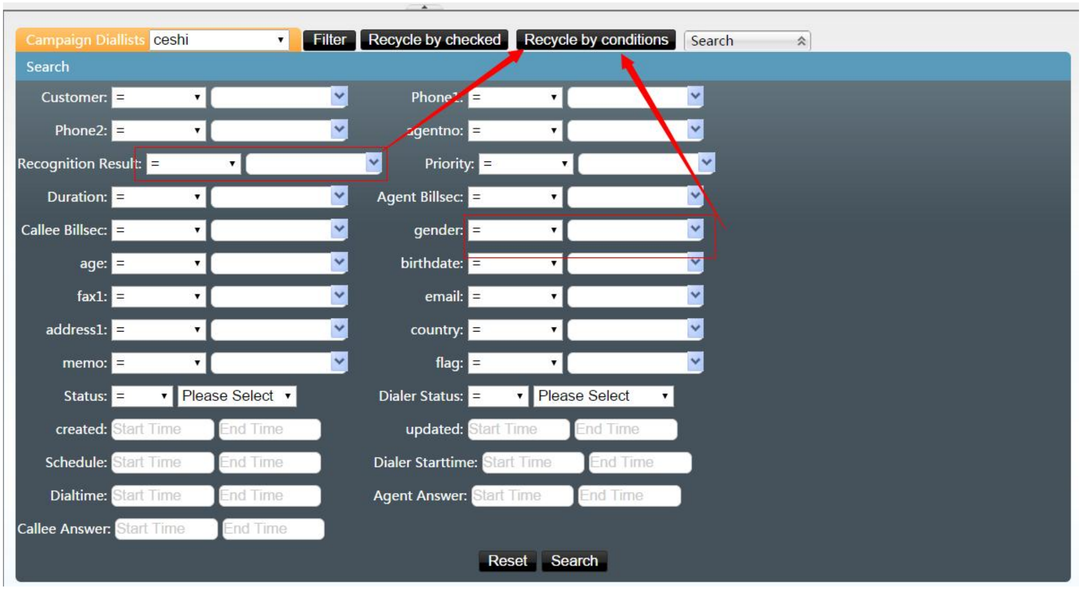


【Recycle by Checked】: only a few data needs recycling



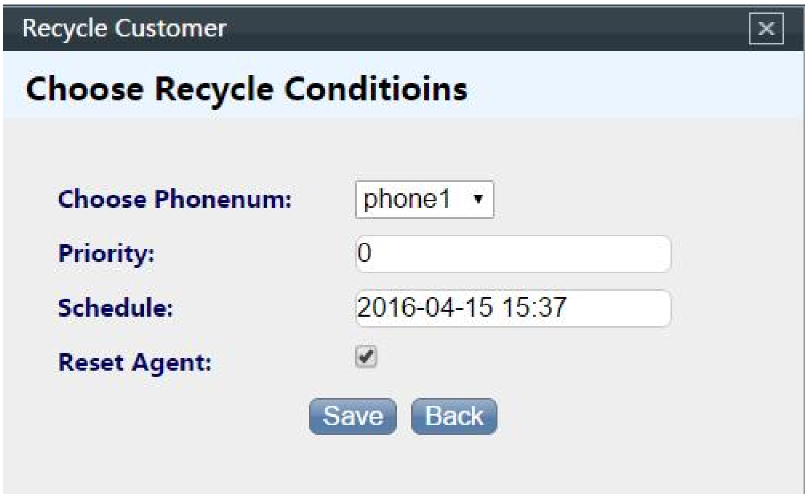
【Delete by Search】: huge data needs recycling

Please set the search conditions on bellow page. It suggests not recycling data more than 5000 at once.



If no search condition, all the data will be recycled.

The bellow windown will popup when click Recycle:



Choose Phone Num： Which phone number field to select.

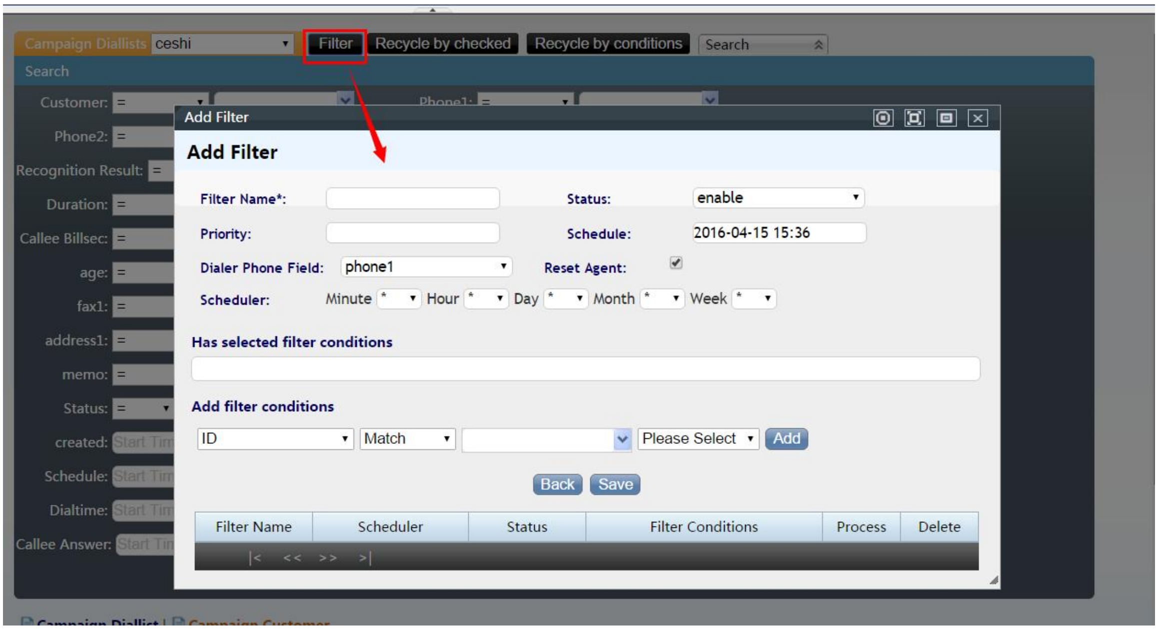
Priority：The priority of the phone numbers, the bigger the priority the higher priority.

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.

Sheduler: When will the filter begin recycling.

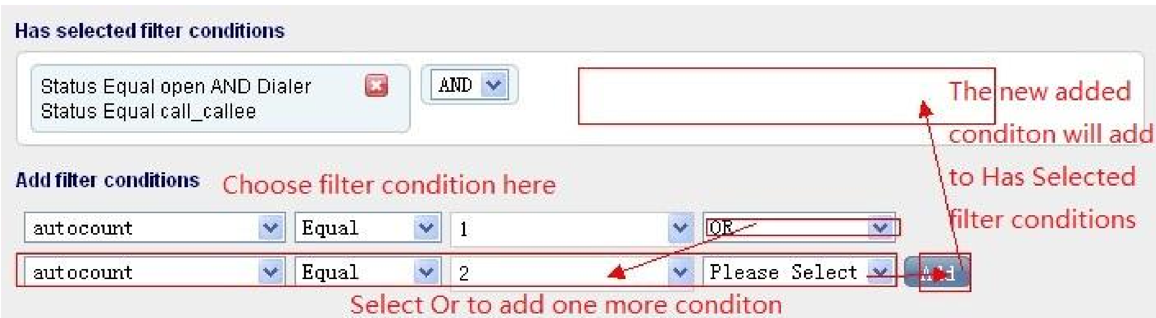
If set Minute,Hour,Day,Month and Week value as *,the filter will recycle anytime when the matched data occurs.If you want it recycles every day, you can set 0 Minute 0 Hour *Day *Month *Week, then it will recycle at 00:00 every day.

Has Selected filter conditions:

This box shows the has added filter conditons.

Add filter conditions

Add the filter condition on bellow:

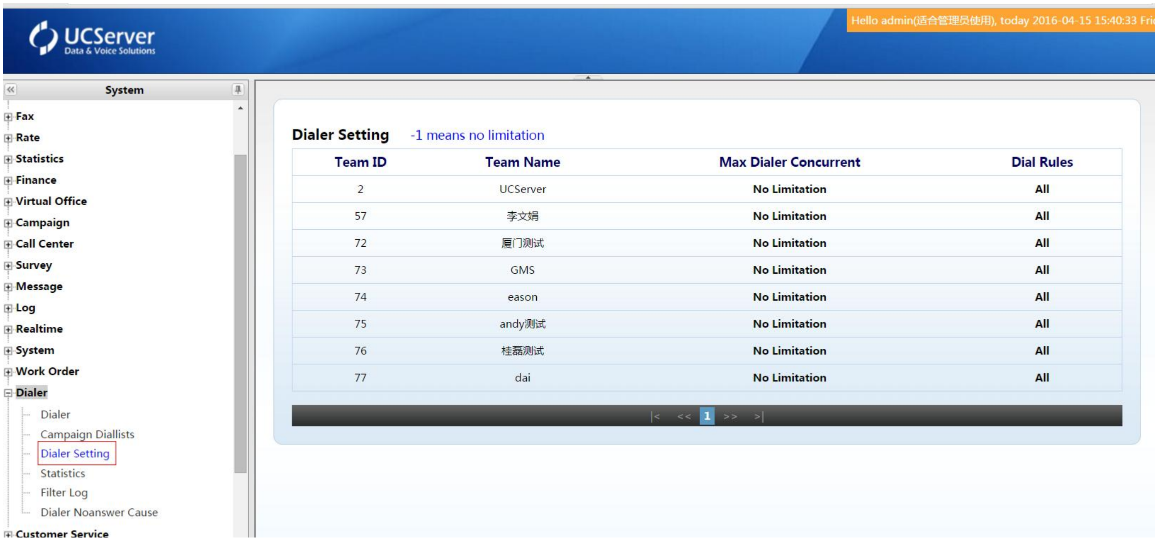


Please go to Filter Log to check the filter execute time,end time and total etc.

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.

17.3Dial Setting

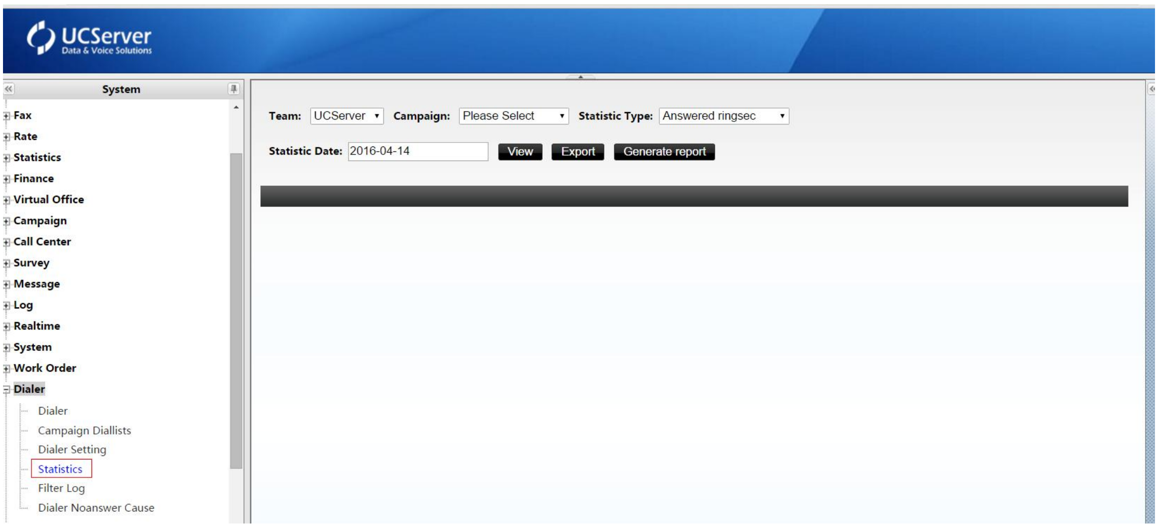
On the left menu, please go to[**Dialer**]–> [**Dialer Setting**] to open the page.



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.



This statistics only record data of pre dial.
The dailing 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 customerfirstly, 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 gent, 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 calee 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 pendig 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 reson, 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 agen 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

|< << 1 >> >| 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

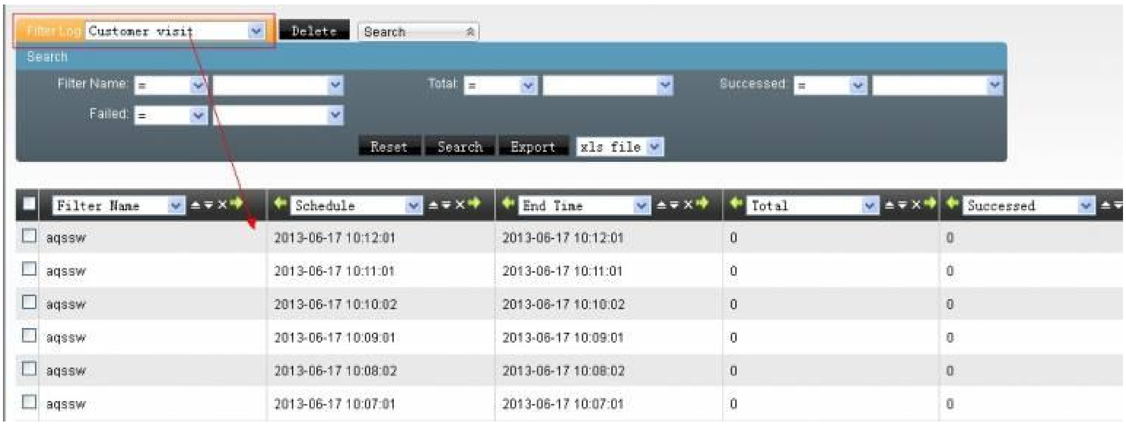
Item	Number	Percentage(%)
No Answer	5544	58.9
giveup	1180	12.5
success	30	0.3
failed	3693	39.2
pending	42	0.4
No Save	5652	60

|< << 1 >> >| Listed 1 - 6 Records, Total 6 Records, Total 1 Page Jump To

These intems' percentage is base on the total pre dial numbers.

17.5Filter Log

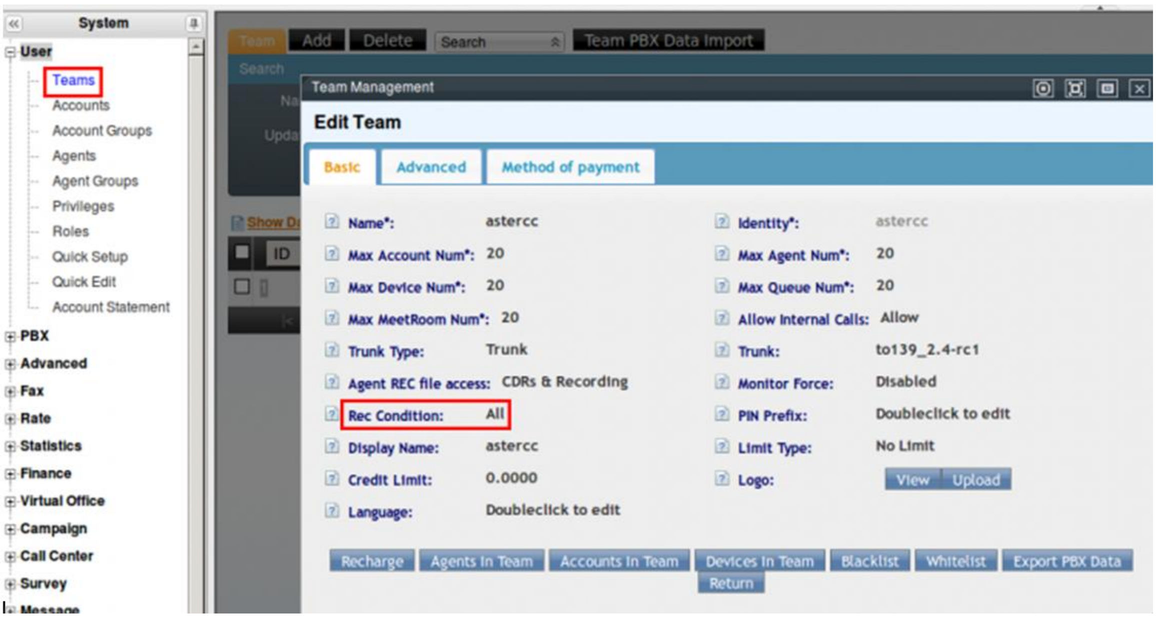
The filter logs of each dialer are shown according to different dial plan.



In this log, we can see the start time and end time of each performance, and the theoretical cusomter 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 indentified, or the log will not show that by which filter it is generated.

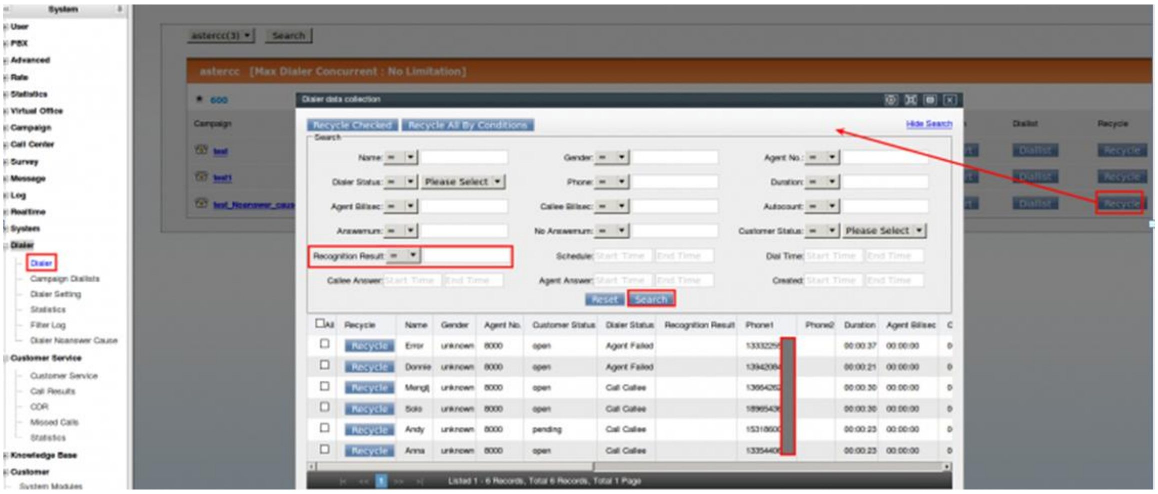
17.6Dialer No Answer Cause

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:

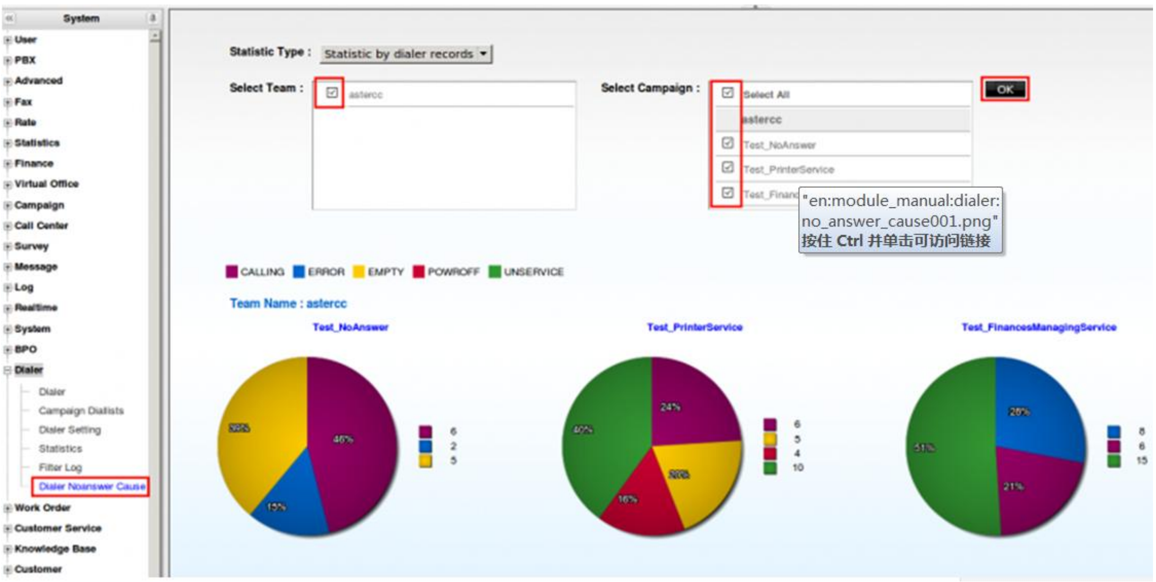


Predictive Dialer

We usually use the Predictive Dialer fuction to achieve the campaign，and we can recycle the customer date by condition，for example：Customer Status，Dialer Status，and so on.Now we also according to condition named “Recognition Result” to recycling，as following：

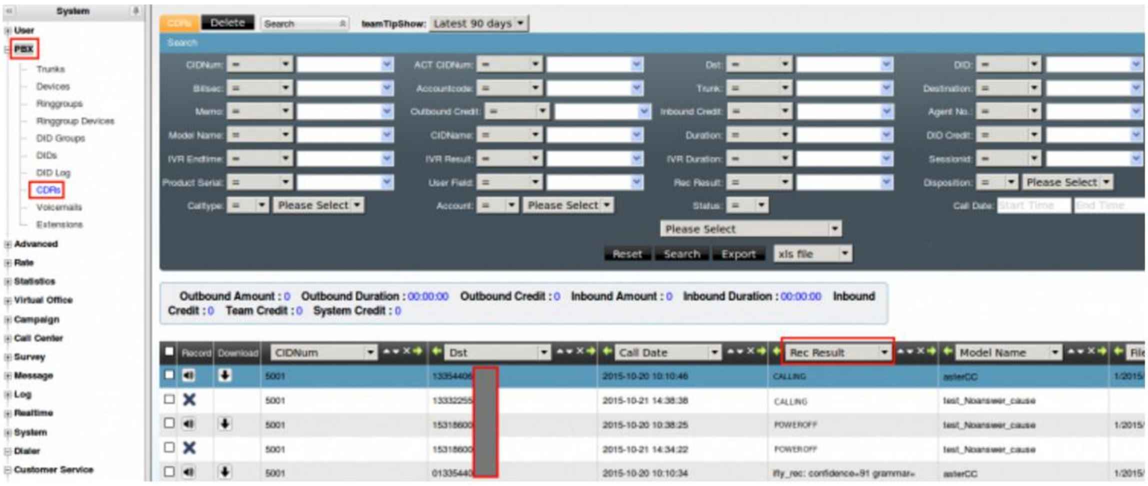


Click [Dialer]→[Dialer Noanswer Cause]，you will enter the statistics page of Noanswer calling.You should select the team and campaign，then click the “OK” button，you can see the reason and proportion of the calling that no answered，as it shown below：



Manual Dialing

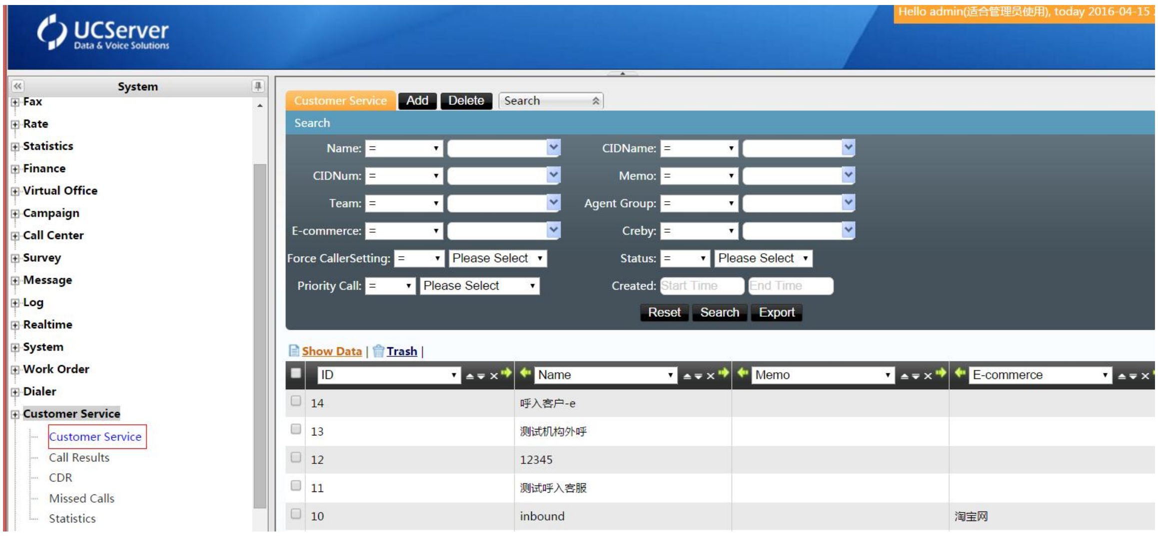
You can dial out as a device or agent，you can view Record Results of them in [PBX]→[CDRs]，as following：



18 Customer Server

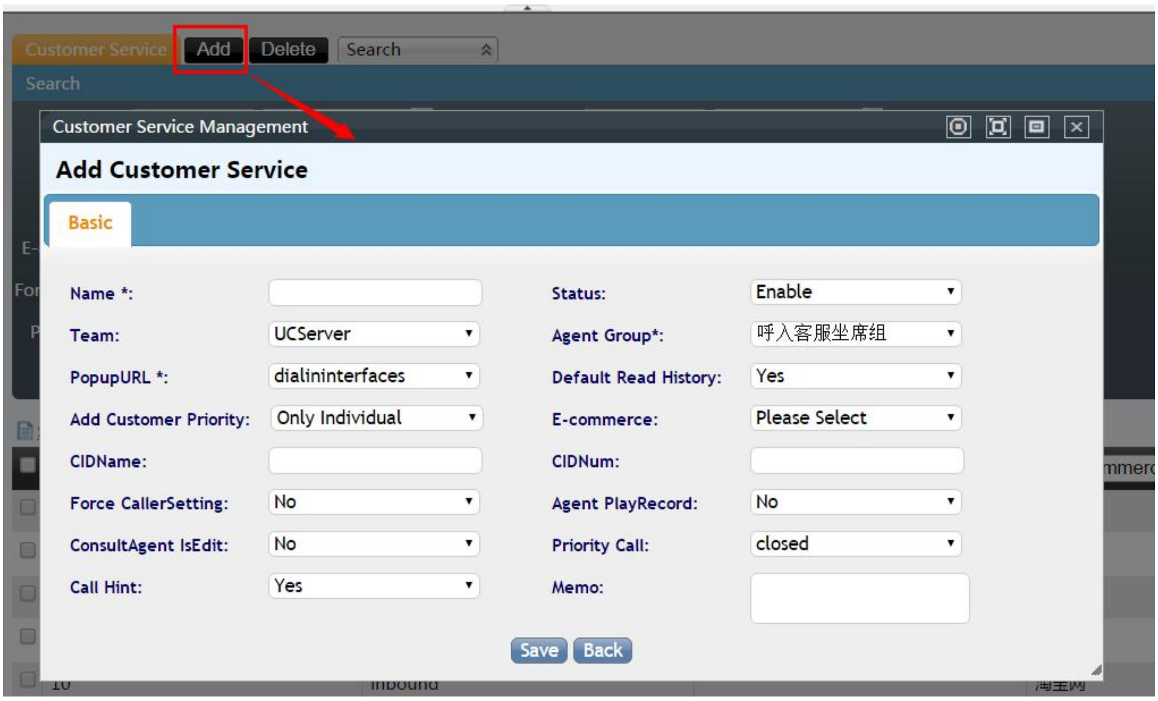
18.1Customer Server

On the left menu, please go to[**Customer Server**]–> [**Customer Server**] to open the page.



Add

Click[Add] to open the Add Customer Server page:



- **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;

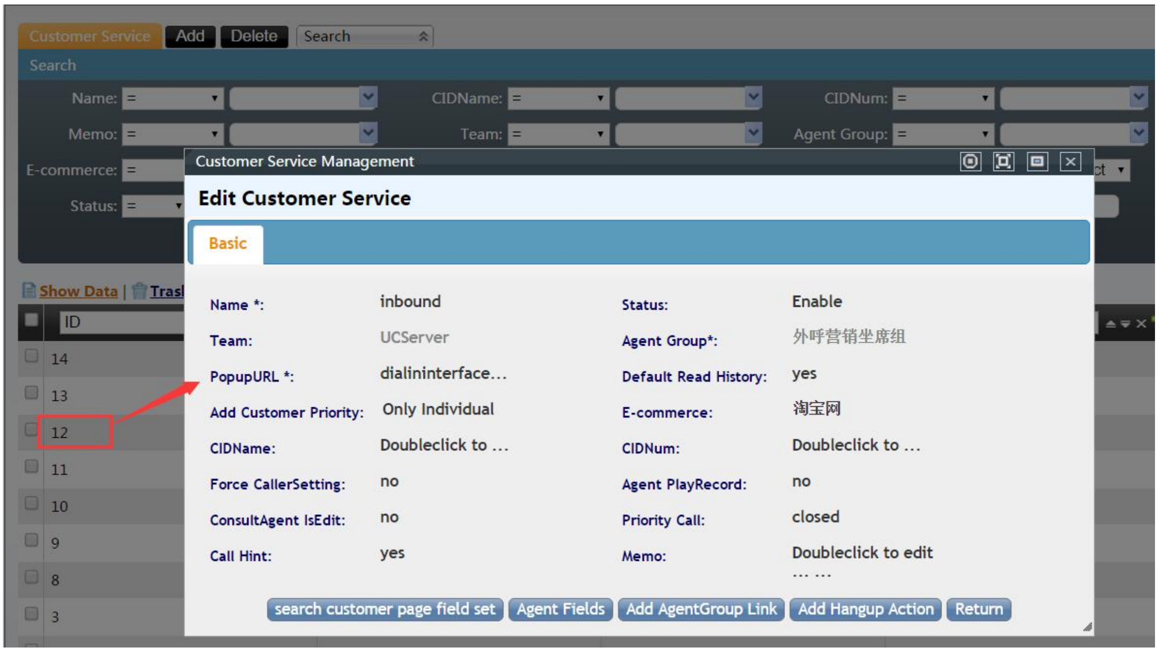
  Organization Priority: Set organization as default setting,but can swift to individual customer data on the page and save as individual if needed.
- **E-Commerce**: Select an E-commerce for incoming agents;
- **CID Name**: The CID name of this customer server;
- **CID Num**: The CID number of this customer 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;
- **Meno**:To give a meno 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

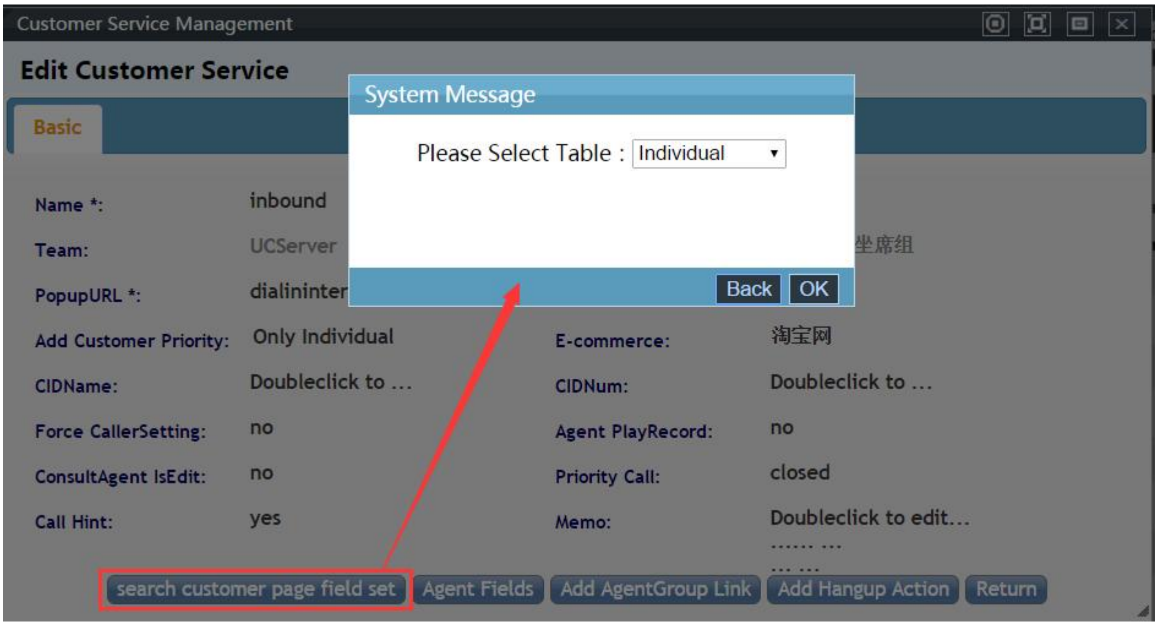
Double click the data,can open the edit page,then update the data.



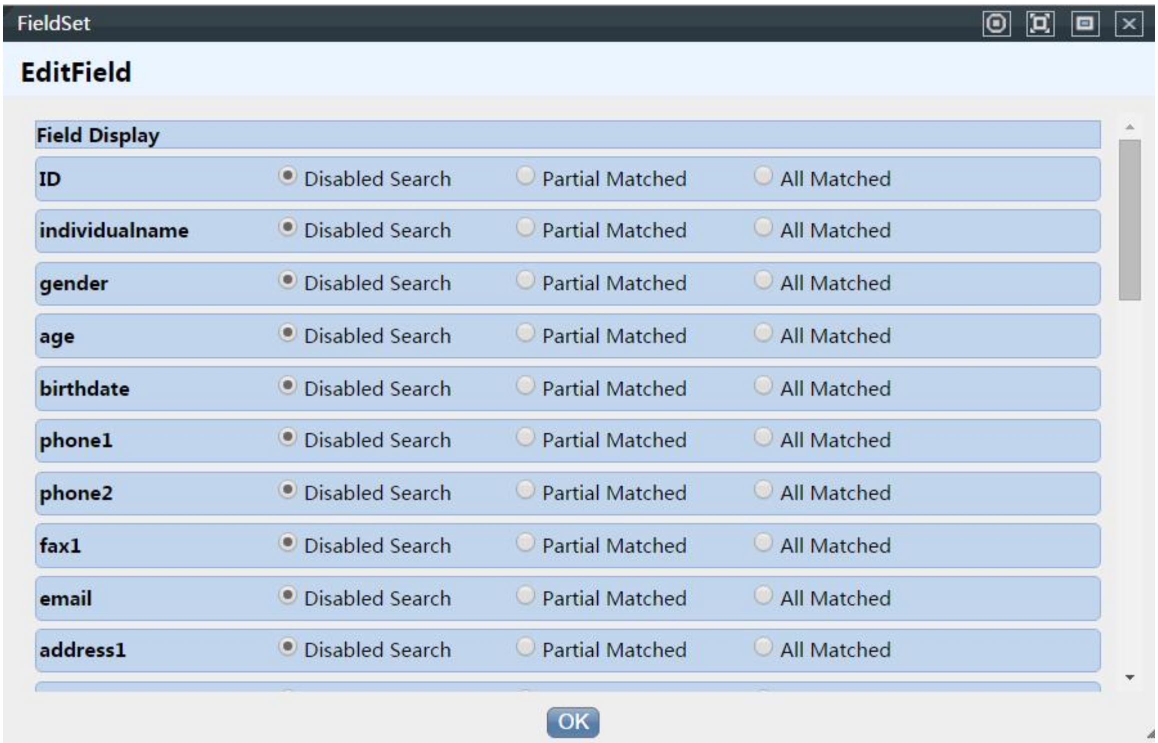
Search Customer Page Field Set

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:

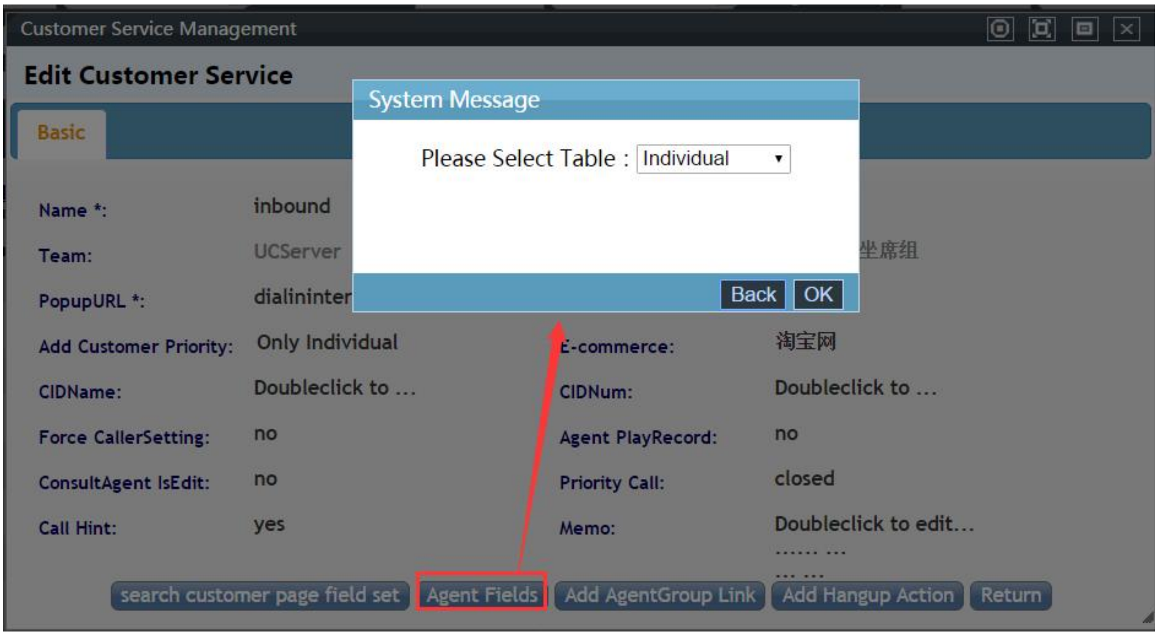


- **Disable Search**: This field will not on customer search page;
- **Partial Matched**: This field will on customer search page,and it is partial matched;
- **All Matched**: This field will on customer search page,and it is all matched;

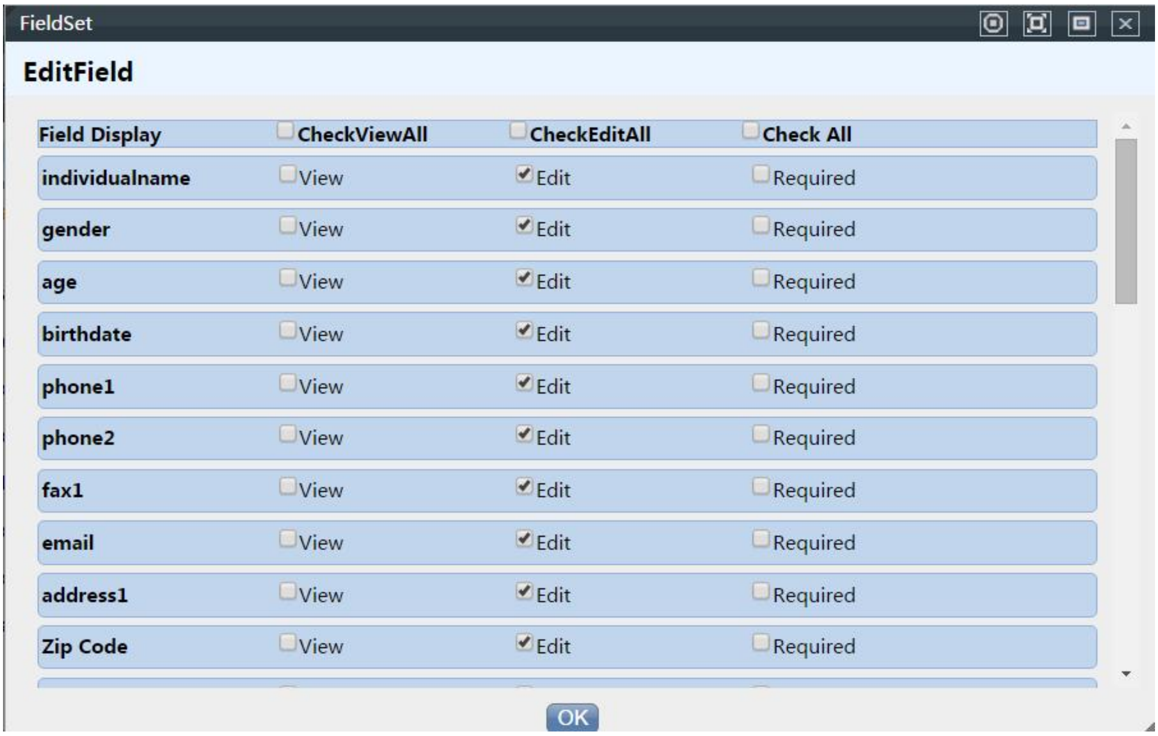
Agent Field

Click 【Agent Field】 to set popup window field: view,edit and required;

A) Select a table firstly:

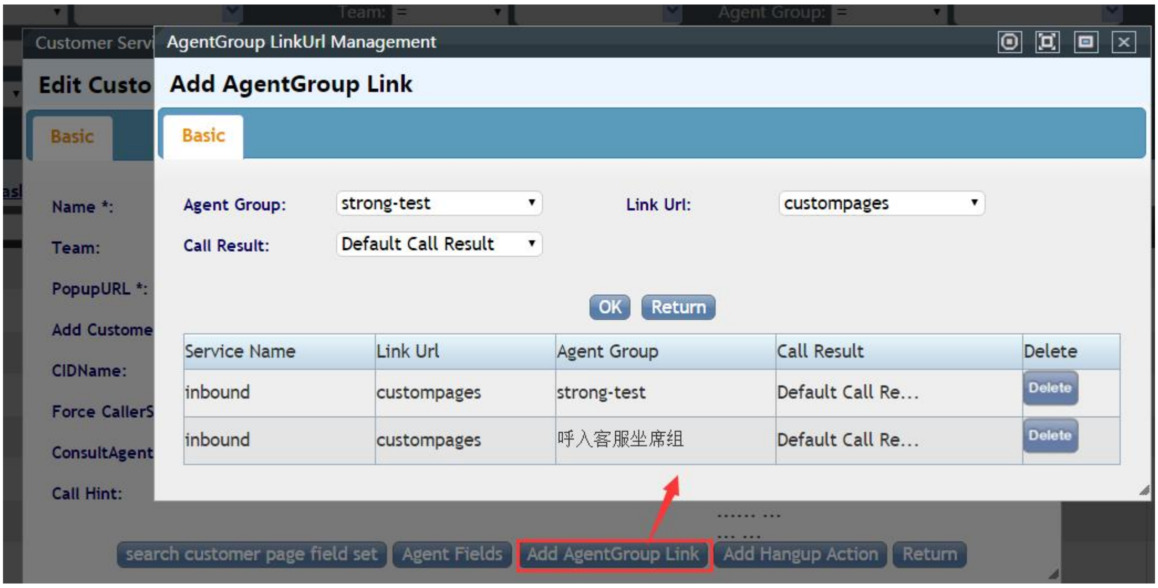


B) Select the individual table to edit the field:



Add Agent Group Link

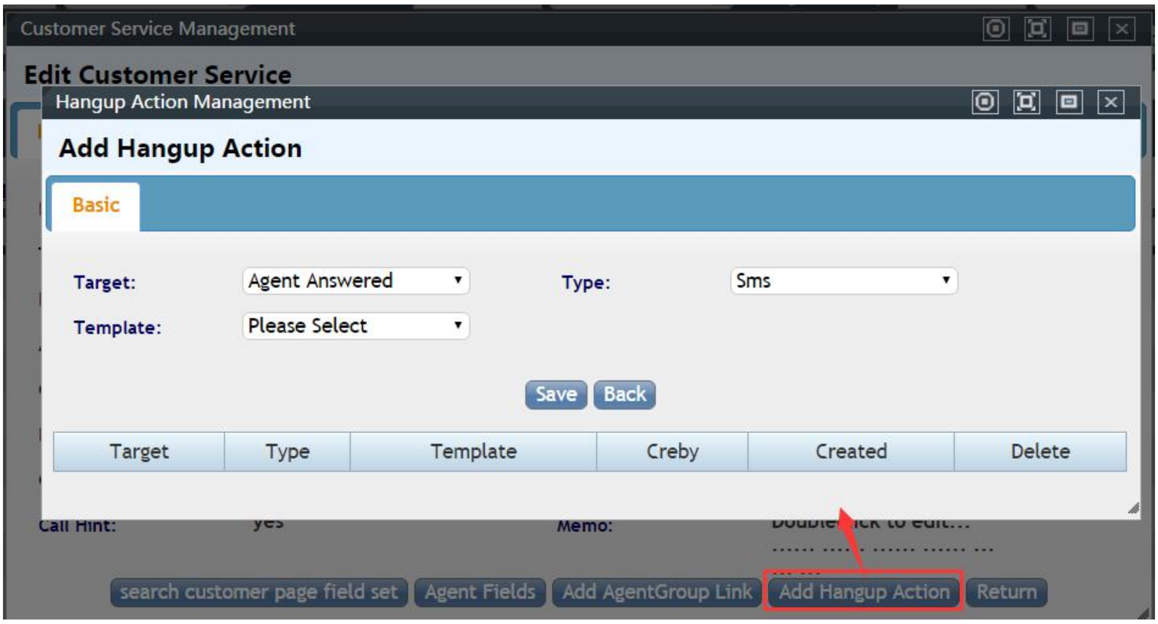
Click【Add Agent Group Link】to open the bellow page.This page will specify an agent group's popup windown, following IVR settings.Eg, In the IVR, press 1 to sales group,press 2 to tech support team.



- **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

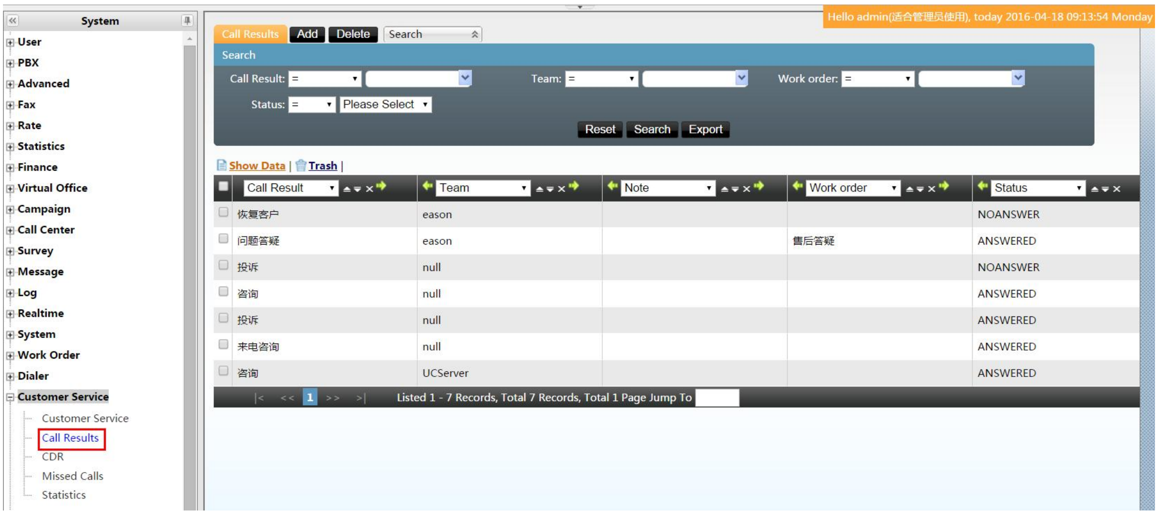
Click 【Add Hungup Action】to open the bellow page.



- **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.

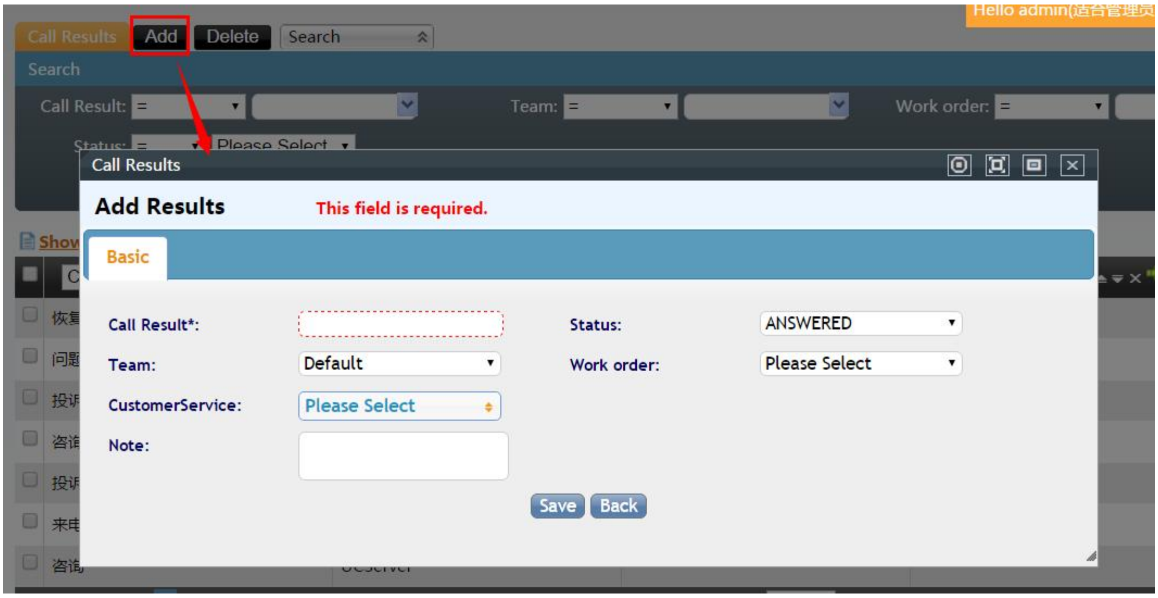
18.2Call Result

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;

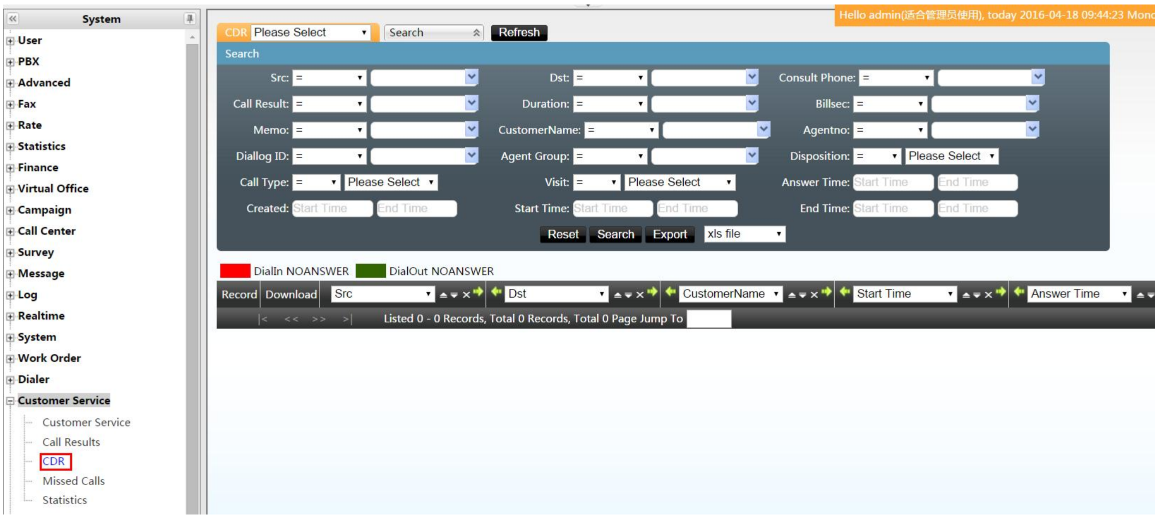
After finished the data,you can click the [Save] button to save the data.Then you can see the data shown in the list.

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.



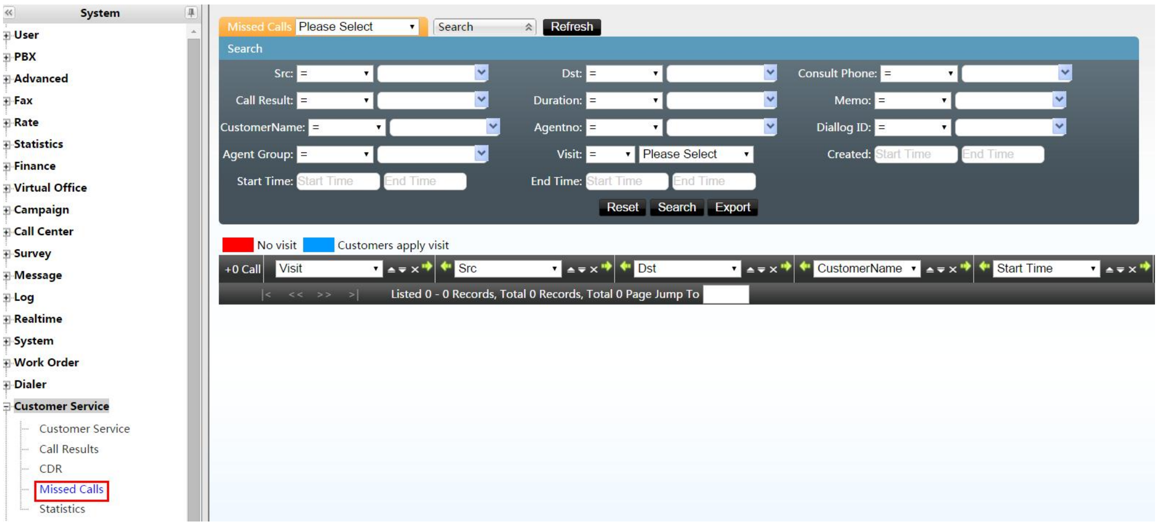
On the data list:

- 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.

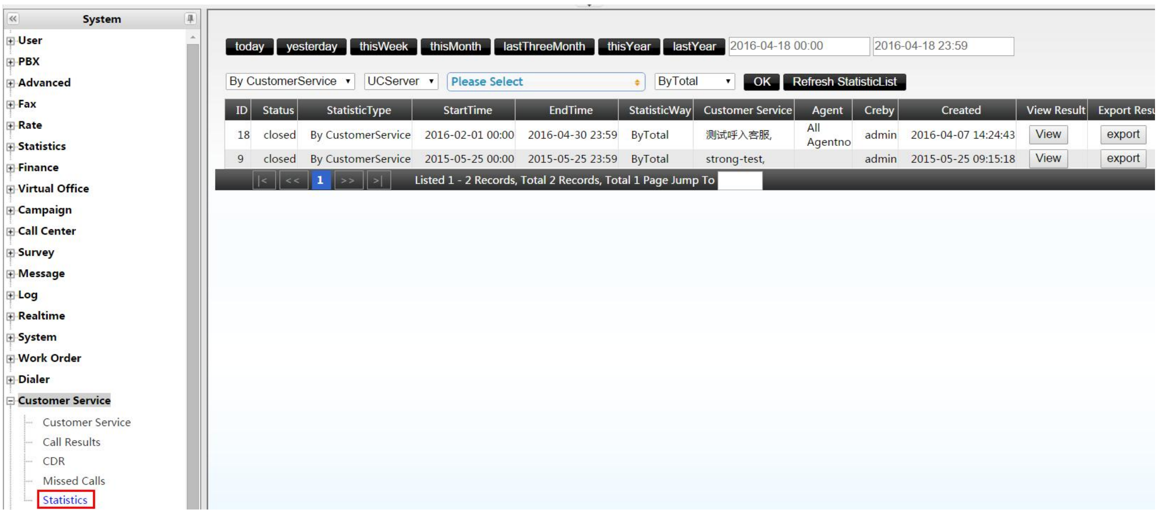


On the data list:

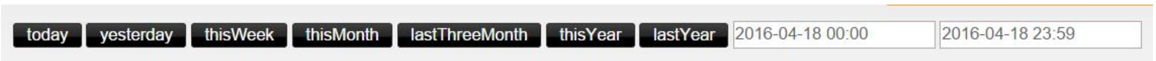
- The red data are missed calls no requiring visit;
- The green data are missed calls applying visit;

18.5Statistics

On the left menu, please go to[**Customer Server**]–> [**Statistics**] to open the page.

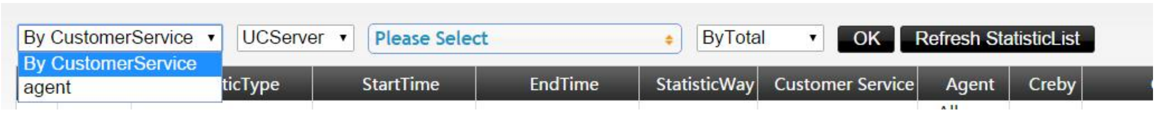


1) Select the statistic time range:

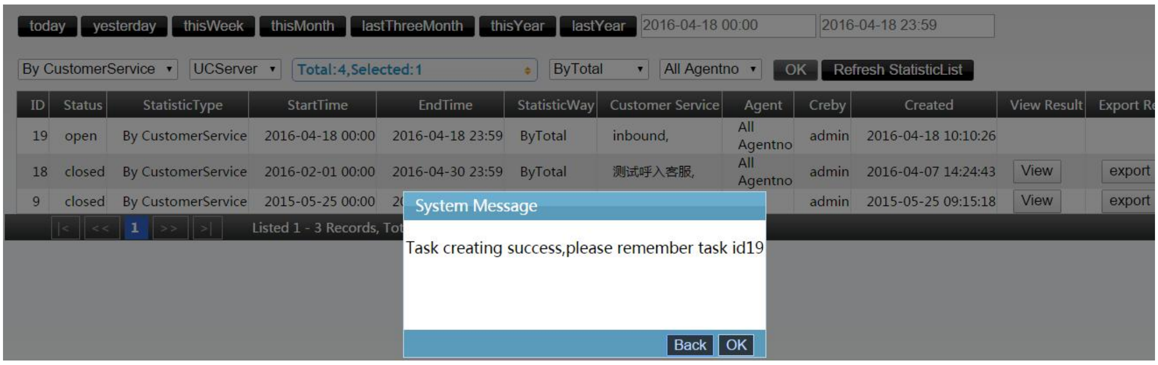


2) Seletct how to show this statistic, by customer service or by agent;

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 backgroud now.When the task closed, you can view, exporot the task.Click view, the detail statisc 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

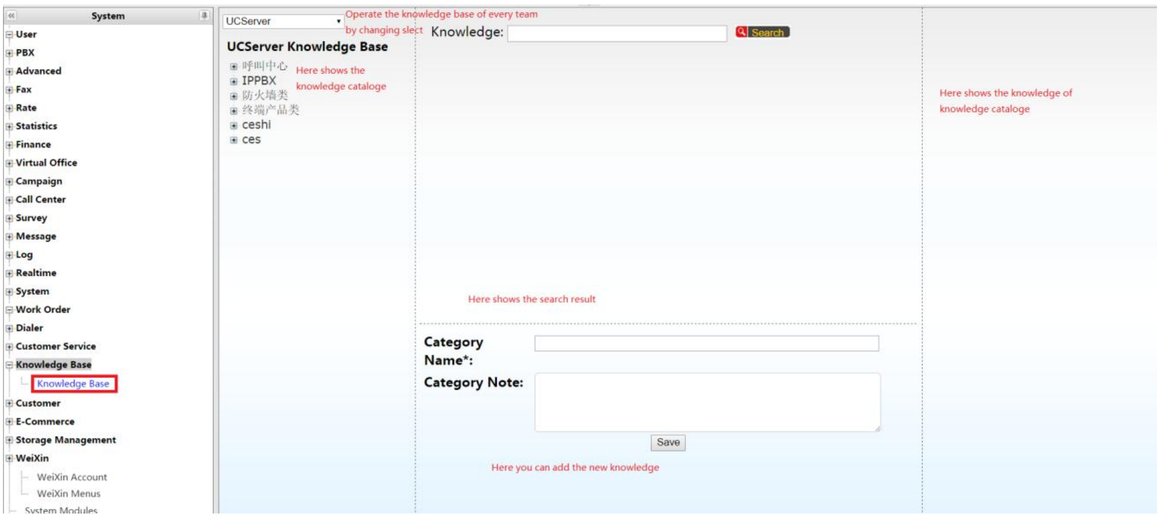
The function of knowledge base

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:



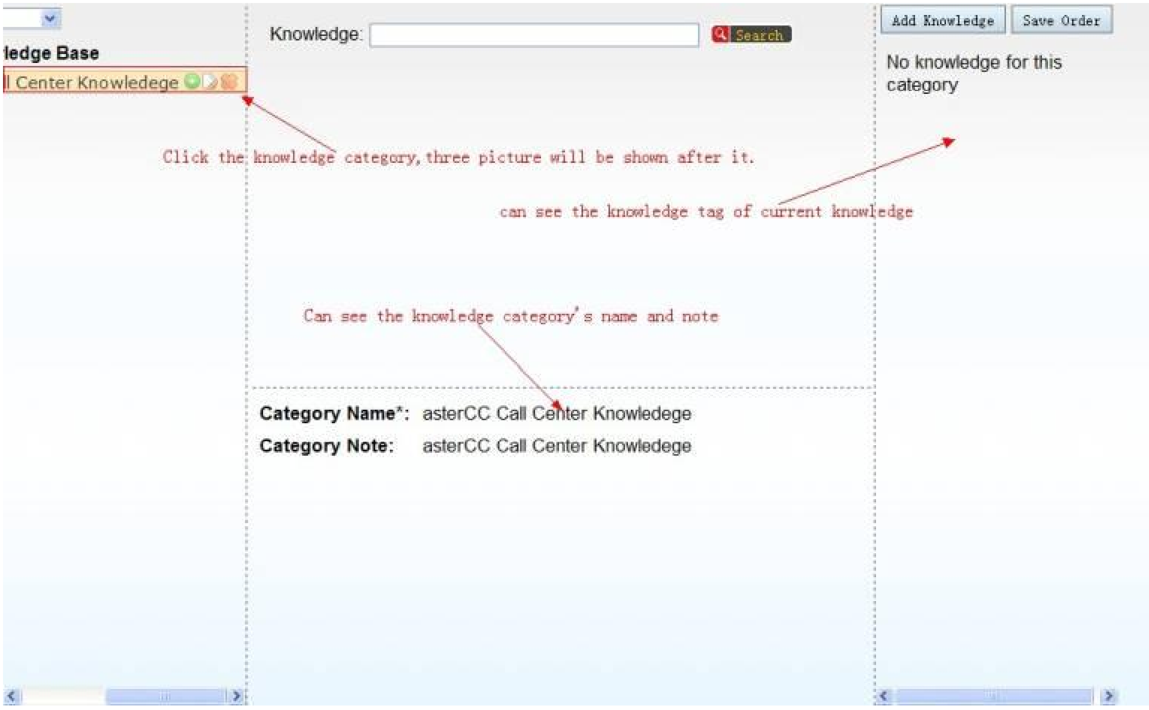
Change the select on the left top of page,choose the team to save the knowledge for it

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

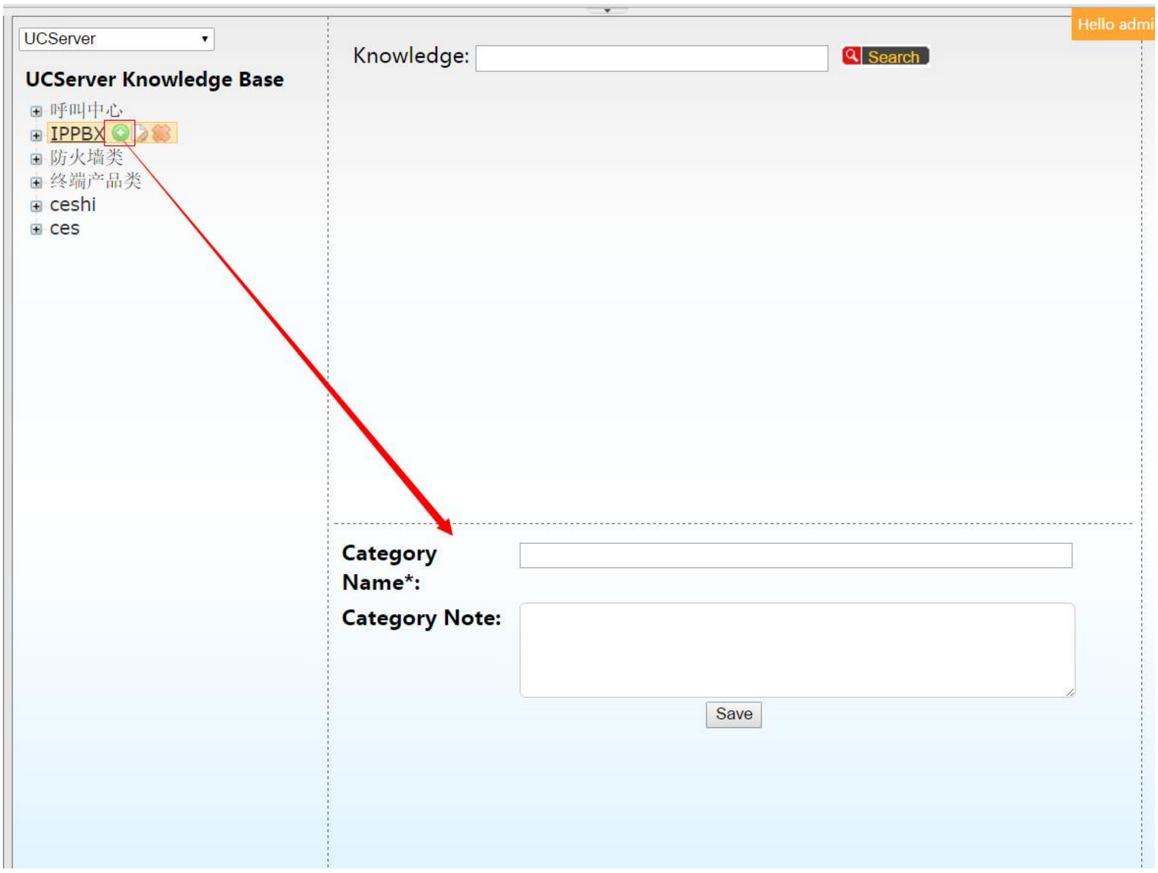
> If you want to add more the same level knowledge category,please click ' Knowledge Base' to add

Click the knowledge category,like this:

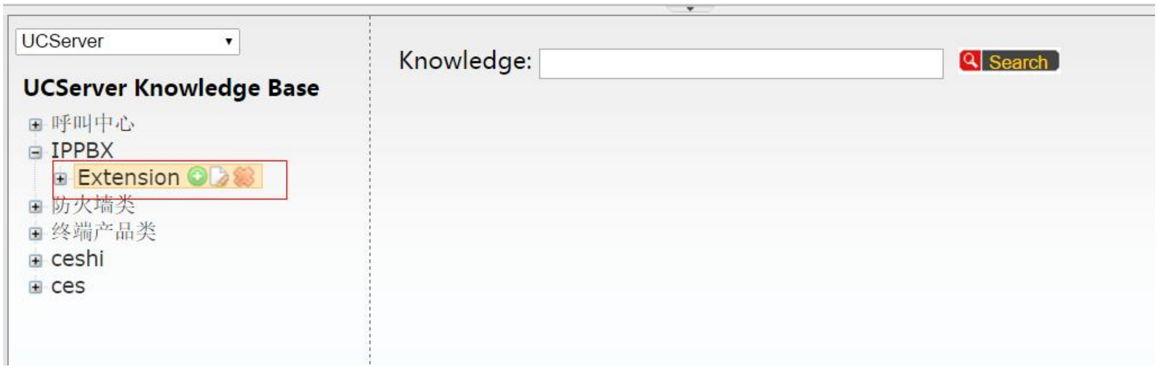


Three picture appear after the knowledge category name,besides 

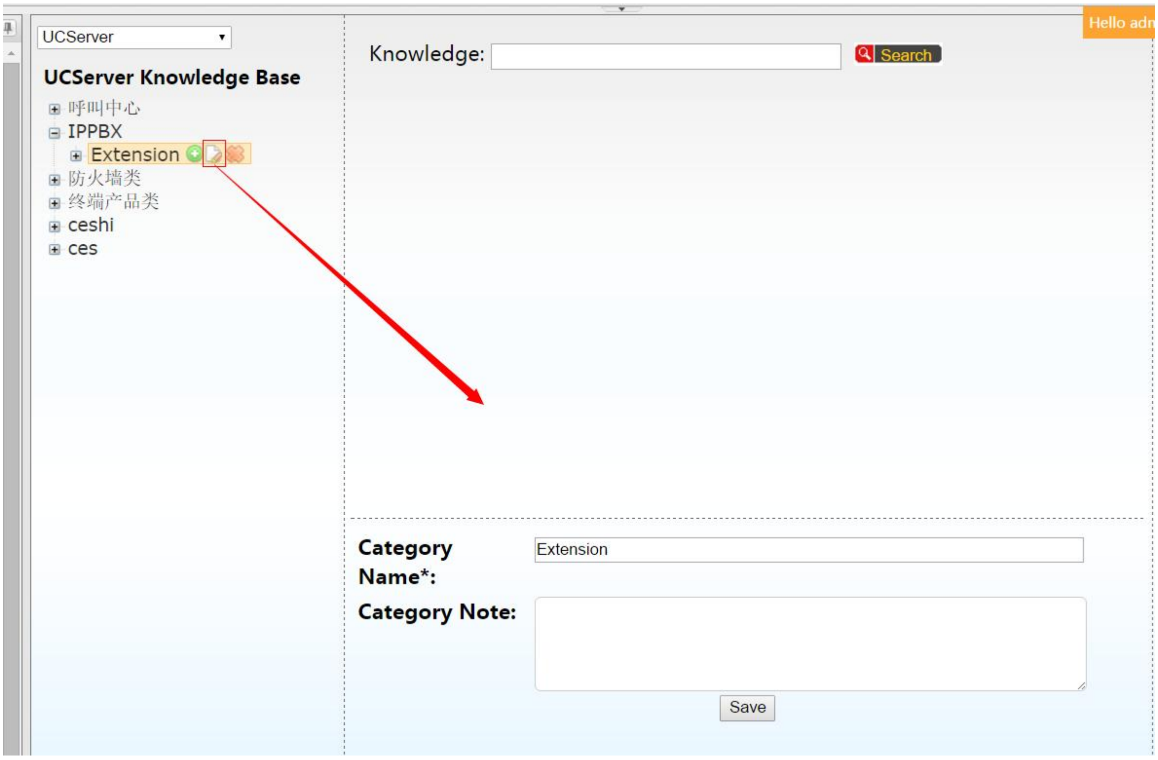
Click ,can save the sub category for current knowledge cagegory



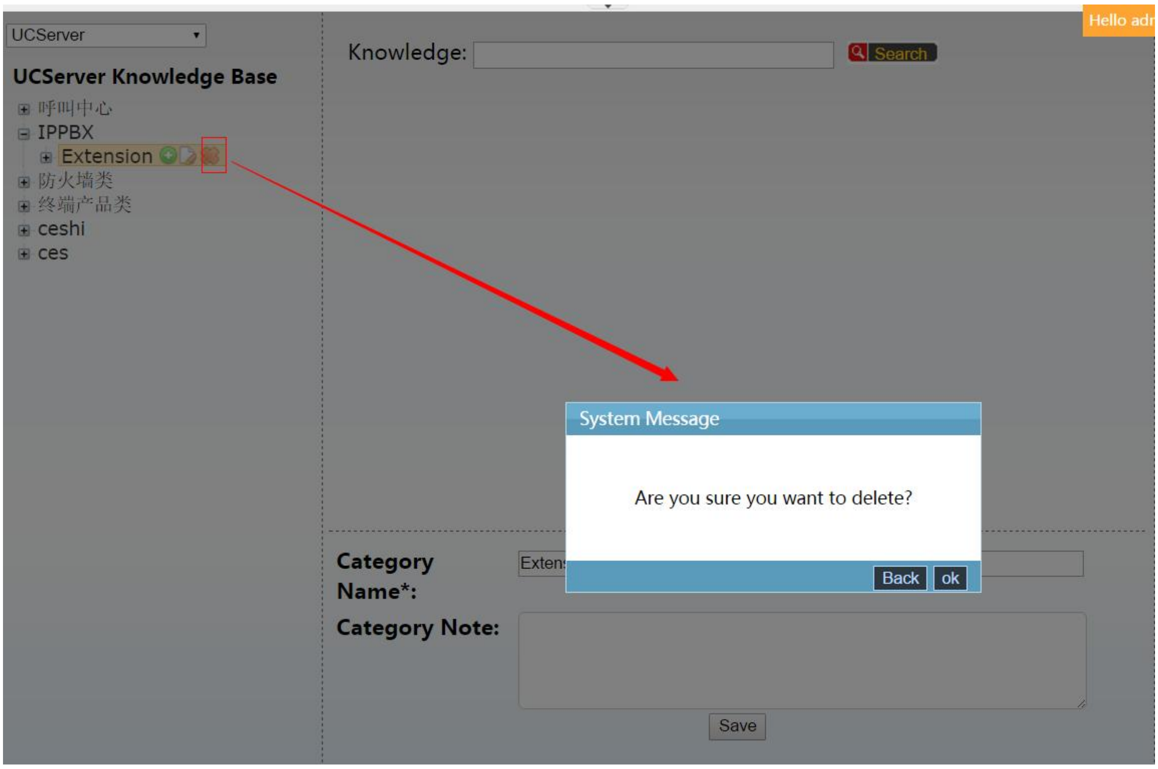
After finished,click save to the sub category,it will be shown on the left under the parent category,like this:



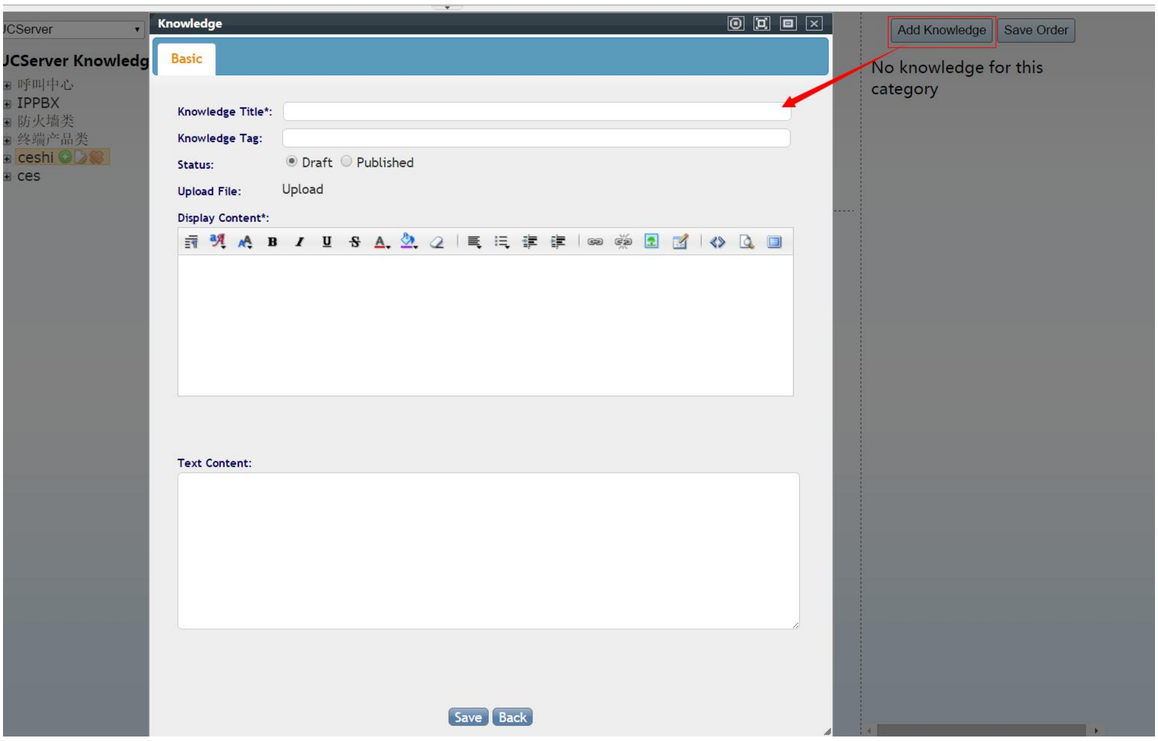
Click to edit the category



Click to delete the category



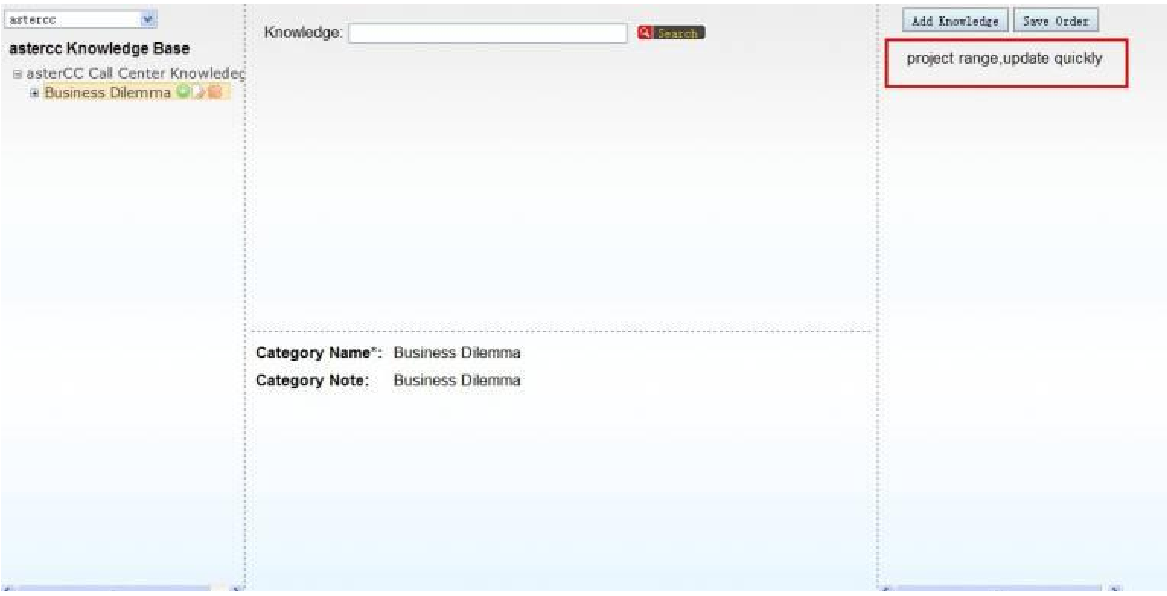
Click one category,you can click the add knowledge button to save the knowledge for the category



- Knowledge Title : The knowledge name to briefly describe the knowledge
- Knowledge Tag:Add knowledge tag,it will quick search the knowledge.Split multiple tags with spaces.
- Status:The knowledge's status

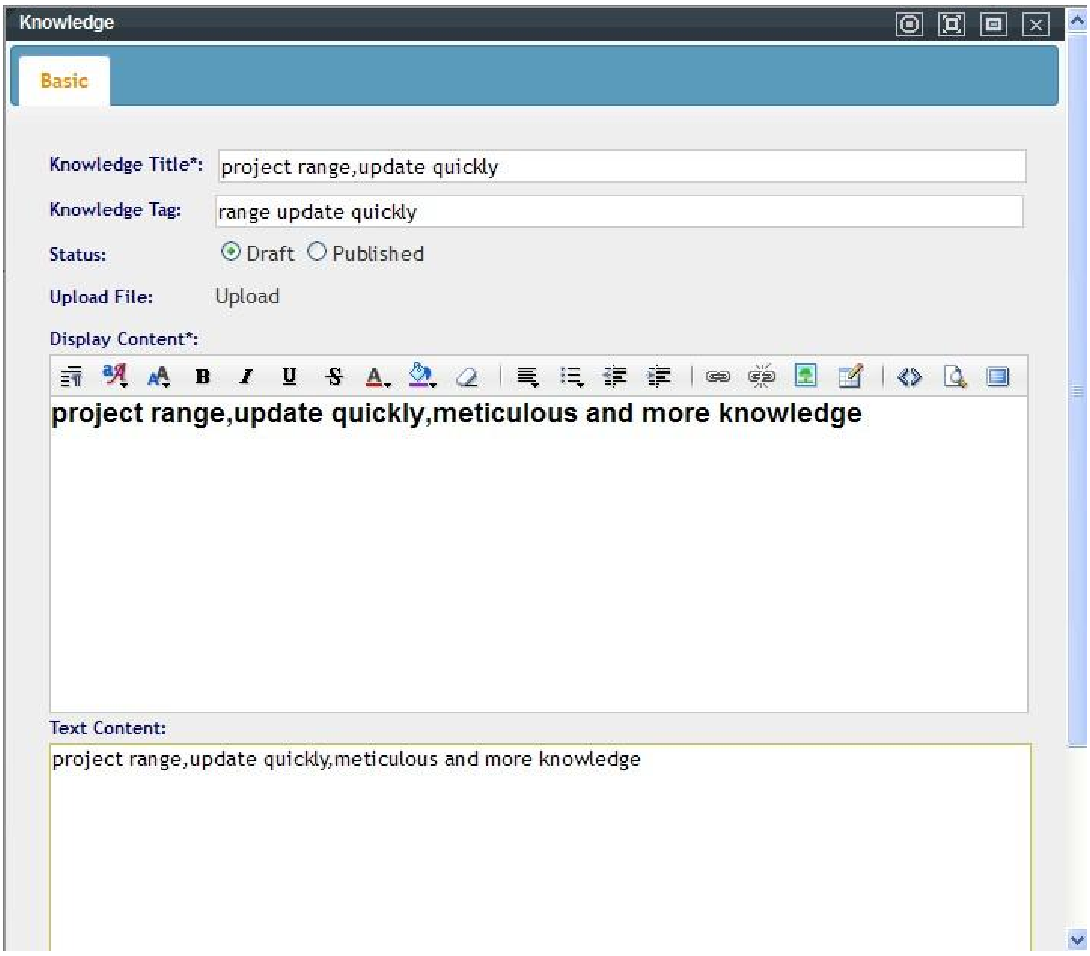
- Draft : Just can see the knowledge created by myself,others can not see this knowledge
- Published : The knowledge can be saw by others who has the privilege of view the knowledge
- Pending Approval : The current dosesn't have the release privilege,when create the knowledge,it's not really published.It 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.



Mouse over the knowledge name,it will change color to blue and two picture button will appear after the knowledge name

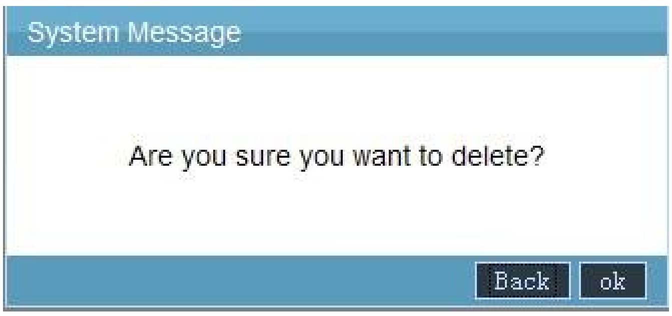
Click button,will see



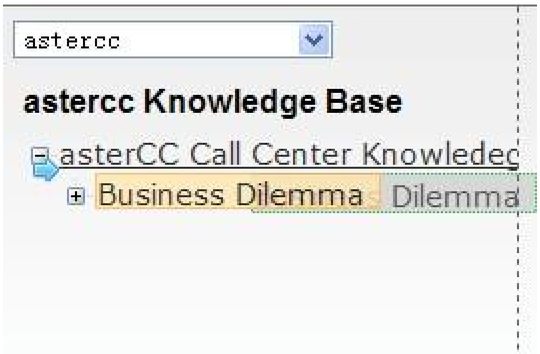
On this page,can update the content of the knowledge

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



If want to order the knowledge category or knowledge,can drag one and move it to the appropriate location,like this:

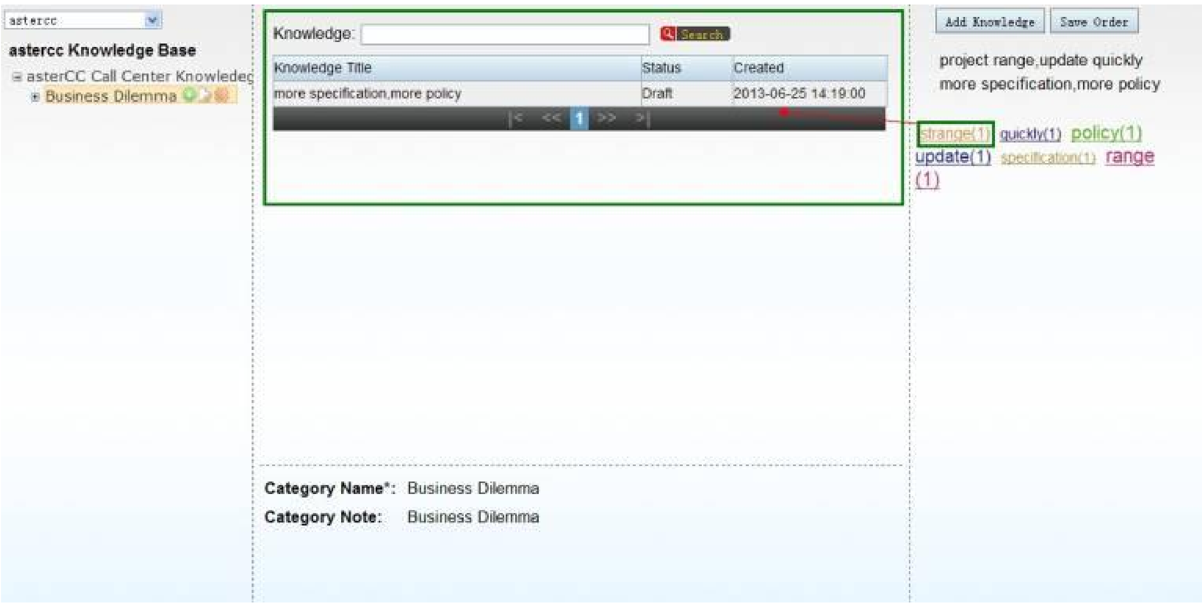


Drag the knowledge category to the appropriate location,then release the left mouse button,it will save the new order

Order the knowledge is the same with the knowledge category

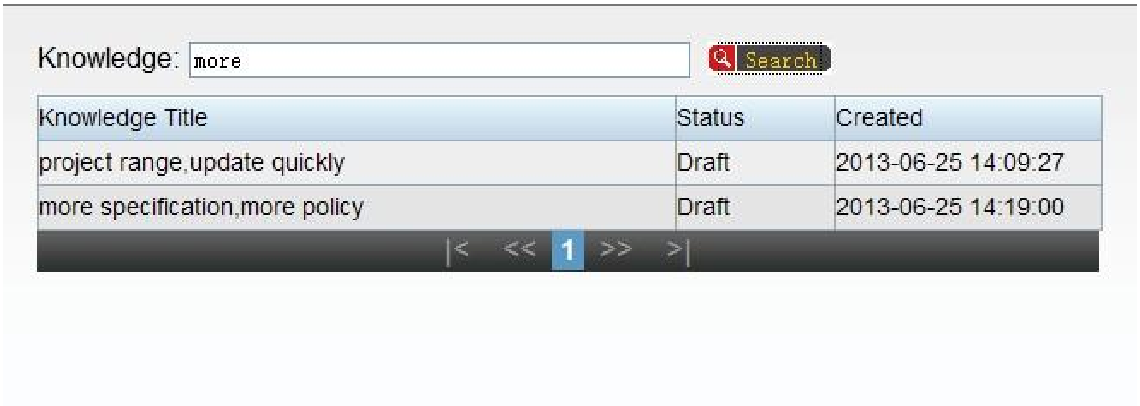
Search Knowledge

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 qucik to help you search the knowledge.

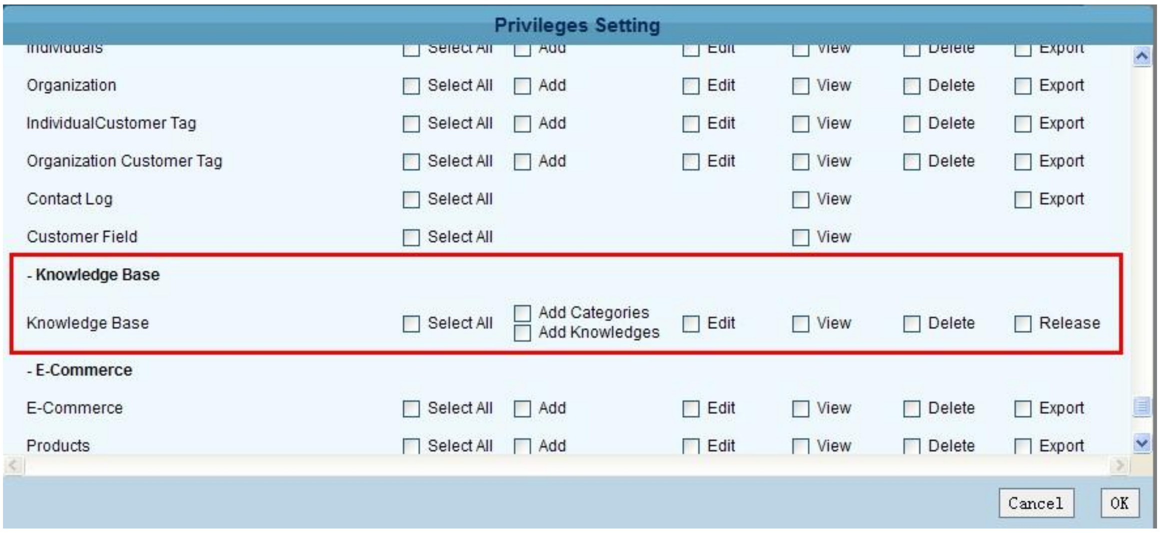
And you can search the knowledge by the search box.Fill in the message,then click search,then will show the knowledge matched with the search message,displayed in the list



Control the knowledge page by the role

Knowledgebase page can be controlled be 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 Knowledege Base page,like:



Can see the privilege of the knowledege base page

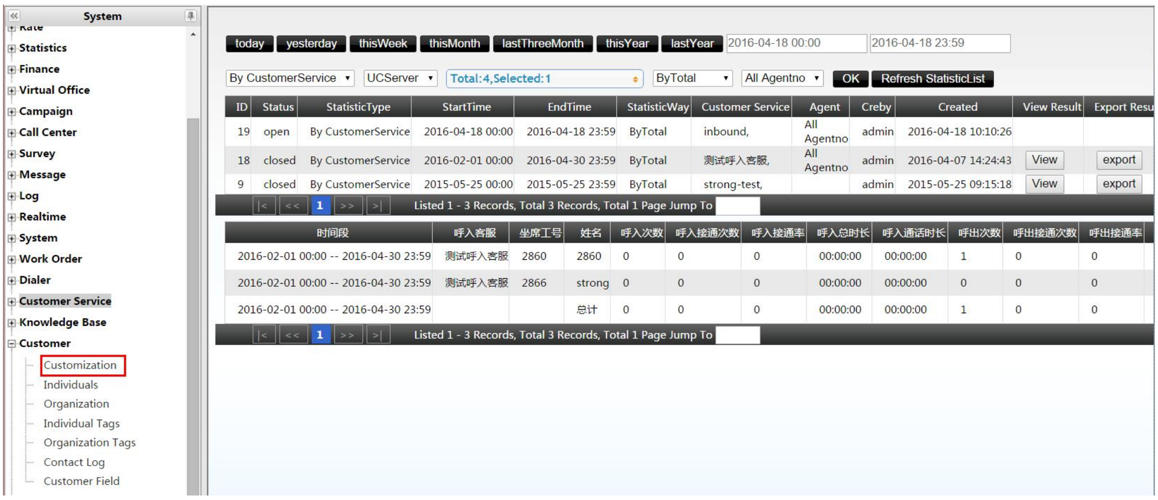
- Add Categories : whether the role will have the priviledge to add knowledge category.If not checked,can not add knowledege category,and click one knowledge category,can not see the  button after the knowledege name.
- Add Knowledges : whether the role will have the priviledge to add knowledge.If not checked,can not see the add knowledge button on the right
- Edit : whether the role will have the priviledge 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 priviledge to view the page.If not checked, the role's account will not see the knowledegebase page
- Delete : whether the role will have the priviledge to delete knowledege 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 priviledge to publish the knowledege.Just the account's role have this privilege will publish the knowledege and audit others' knowledge which the status is `Pending Approval`.The published knowledege 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

20.1Customization

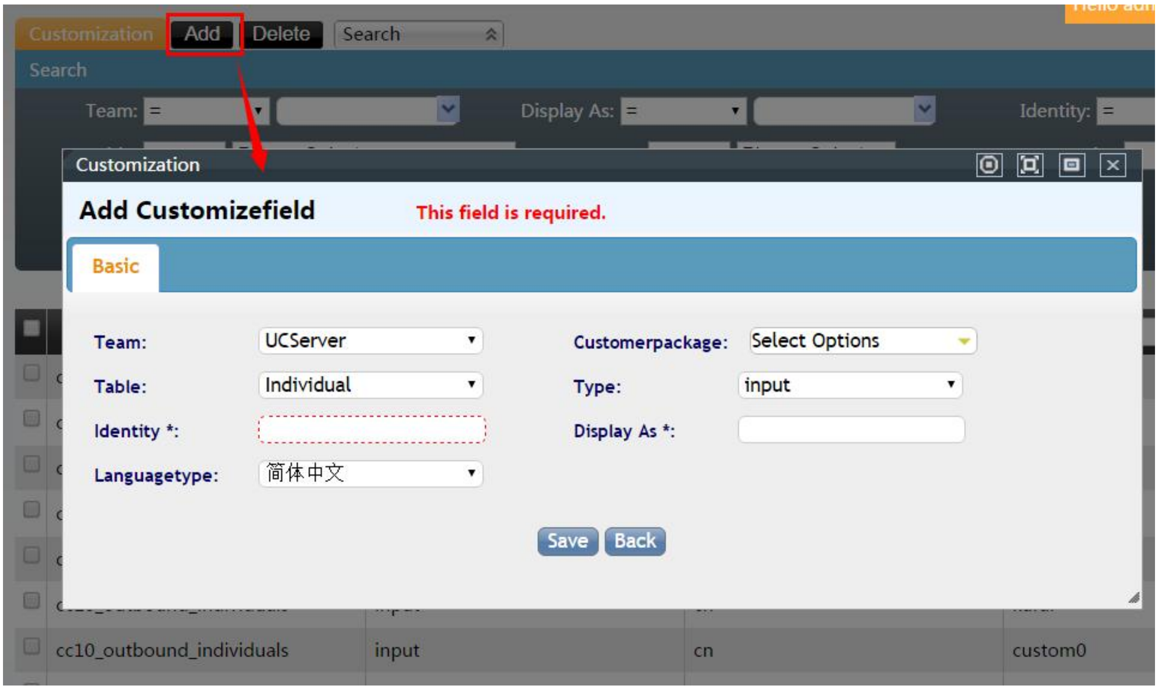
On the left menu, please go to[**Customer**]-> [**Customization**] to open the page.



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.

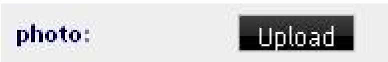
> FAQ: I have a package A, now I want to add a new field "level" into it, and I want system create this field for all new packages, in this case, we need to create two customization
>
> 1st, we select package A, add a "level" field
>
> 2nd, we don't select any package, add a "level" field, so all new 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

- Selectoption: When the type is select, you can put user selection, separated with comma ,

- integer: integer number
- text: for memo

- upload: for upload files, images



- date: year, month and day

- datetime: year, month, day, hour, minute and second

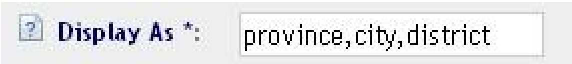
- relate: for country/province/city

- 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

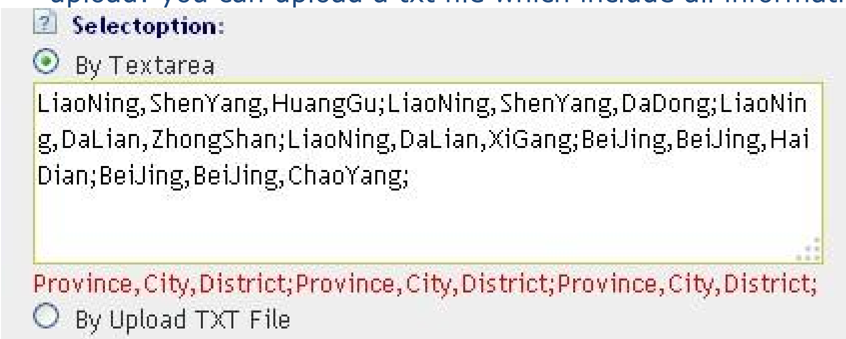
How to use relate field

- 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(,)

- put three Display As, separated with comma(,)

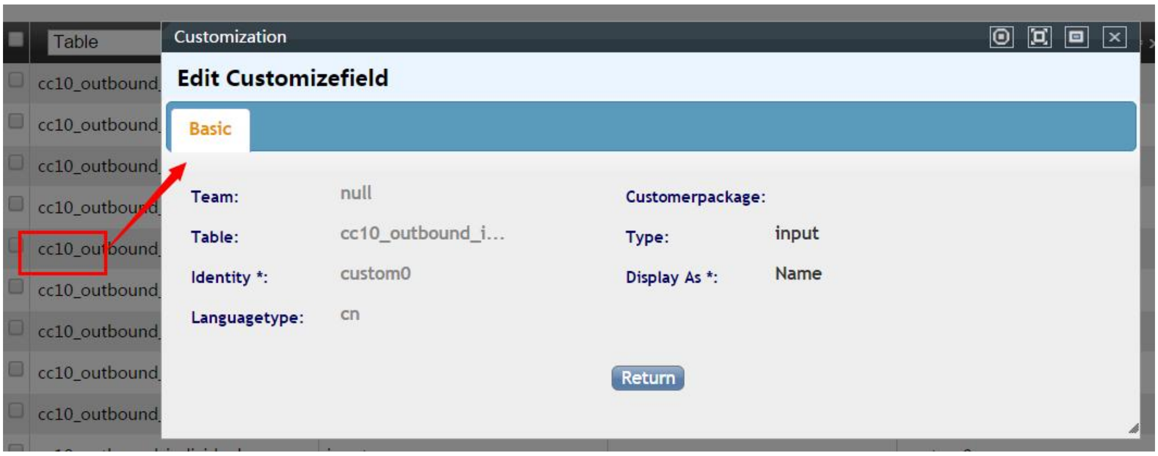


- select input method for relate field
- textarea: you can put the data from the page
- upload: you can upload a txt file which include all information



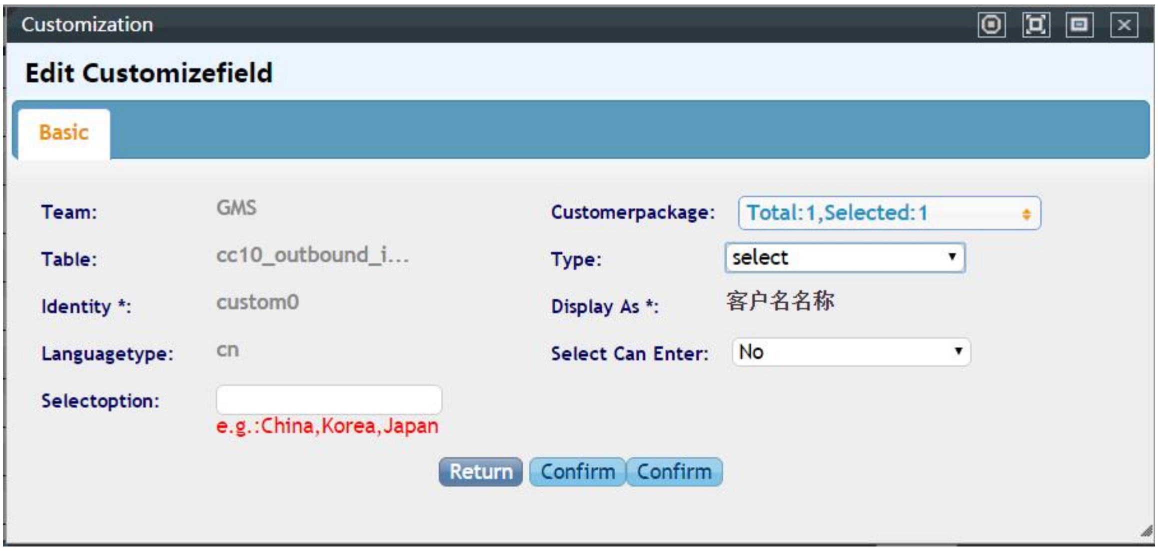
Edit

- 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

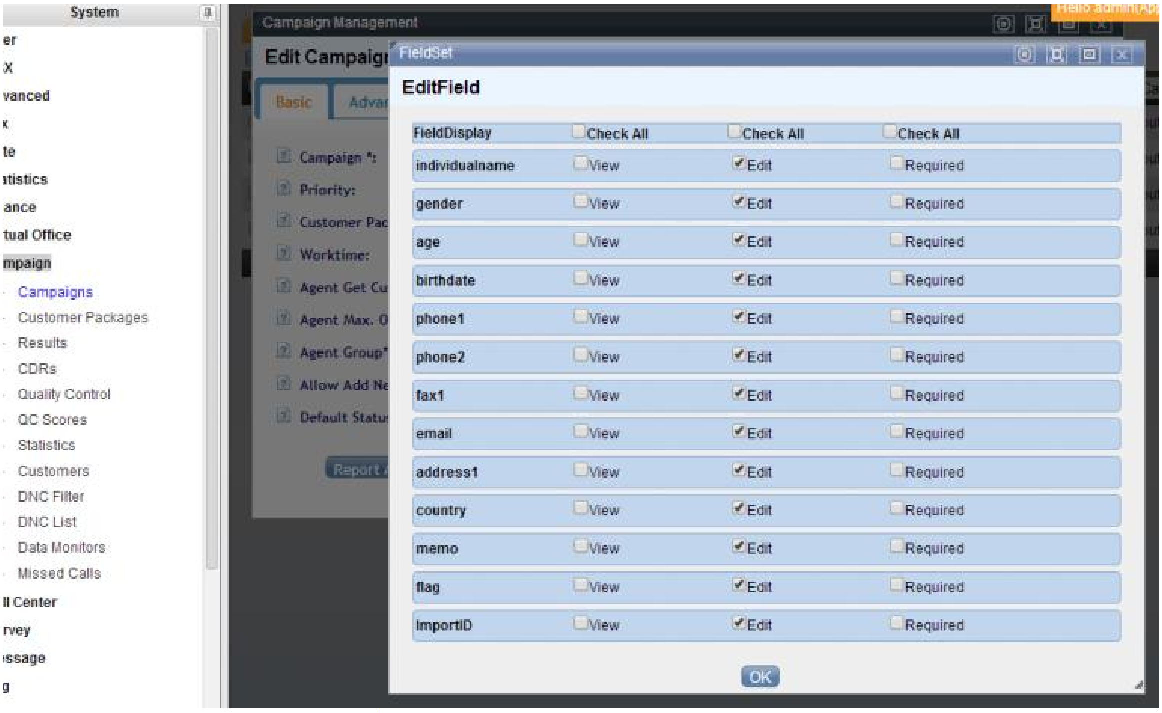


- When type is input or select, you can change it to select or input

Display

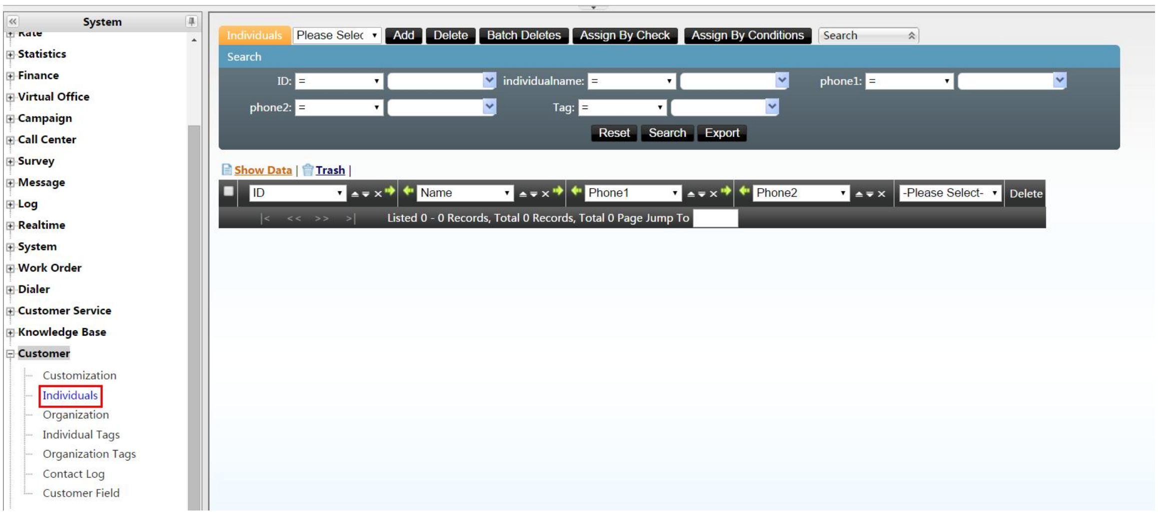
- For customer service module, you can go to Customer → Custom Fields to adjust display order, hide a field or change user permission

- For campaigns, you can go to Campaign → Campaign, background field and agent field to change



20.2Individuals

On the left menu, please go to[**Customer**]–> [**Individuals**] to open the page.



Module Funtion: It is for managing individual customer list.When creat 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 campaingn.

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;

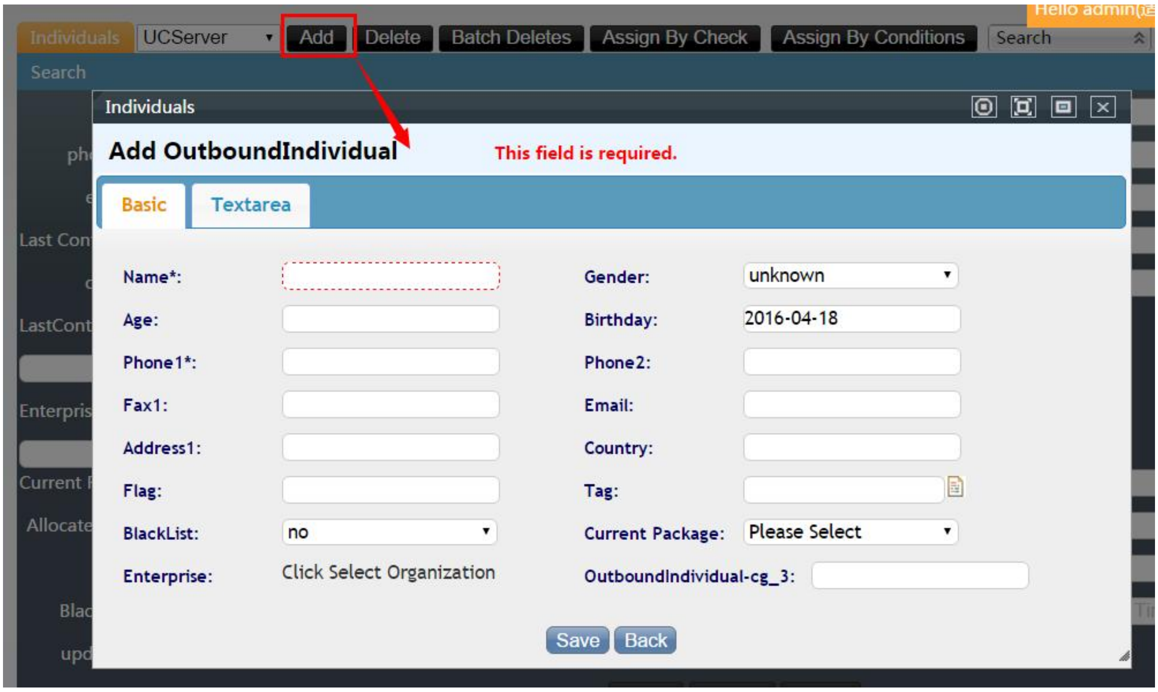
Import through individual customer package

2.Add through[**Customer**]→[**Individual**]

3.Add by agent after finishing a call;

4.Add through [**Campaigns**] →[**Customers**]

Add



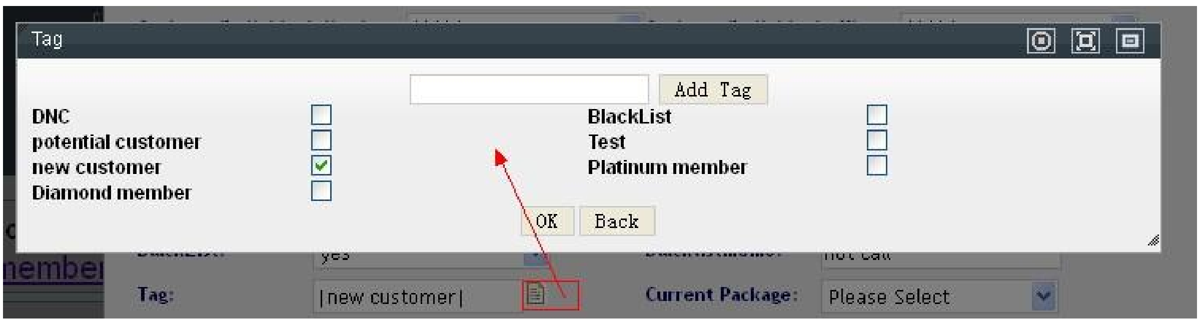
Name: Name this Individual

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;

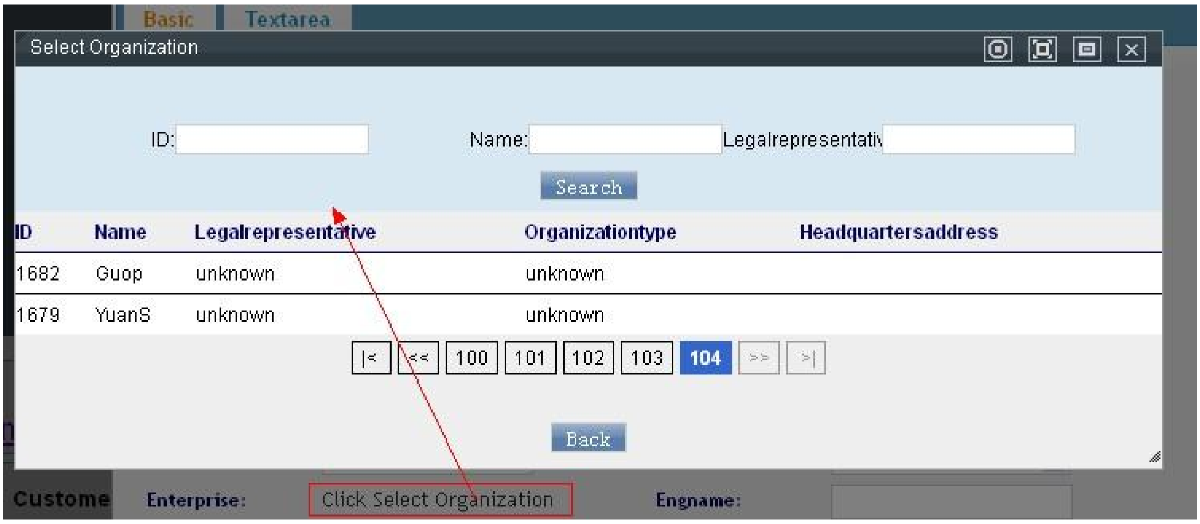
Blacklist：If choose"Yes"，then the numbers filled will be added to Advanced->Blacklist.These numbers can not be call in to the system.We suggest if setting Yes for blacklist, please also fill Blacklist Reason field(Please add Blacklist Reason field under Customer->Customization)

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].



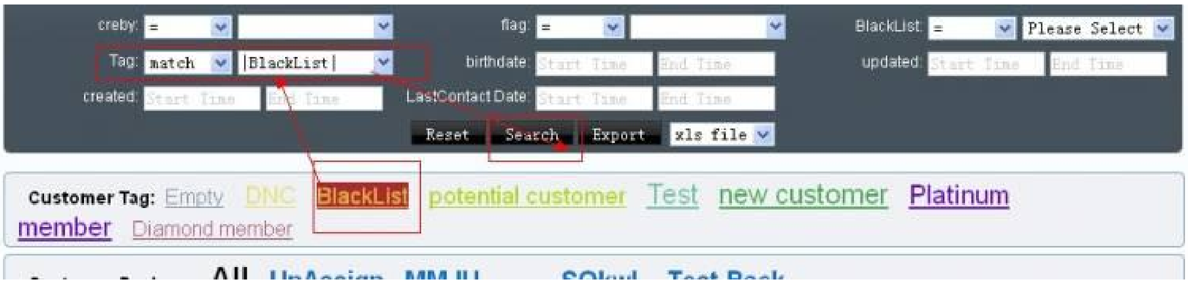
Enterprise：To link Individual customer to Organization customer.Means this customer also blong to this organization.Only organizations within the same team are available.



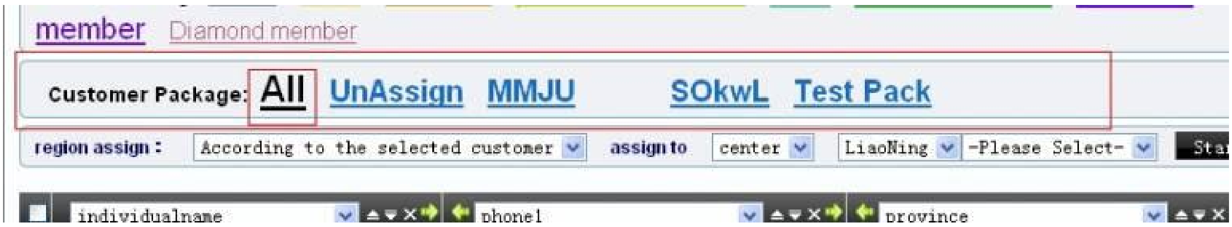
Quick Search

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.

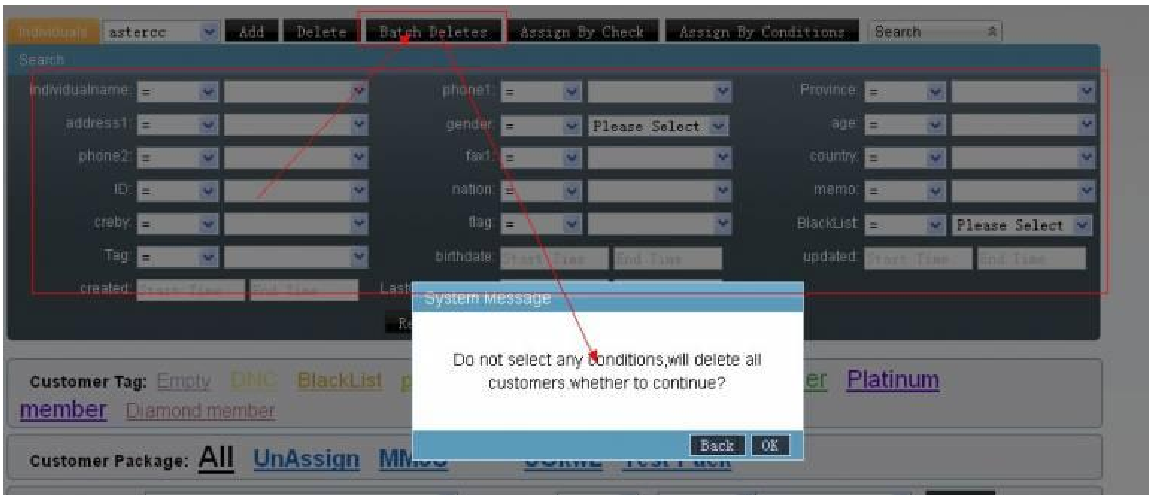


Customer Package：To search customers belong to this package.



1.1Batch Delete

To batch delete customers according to search result.If not select any conditions, it will delete all customers.



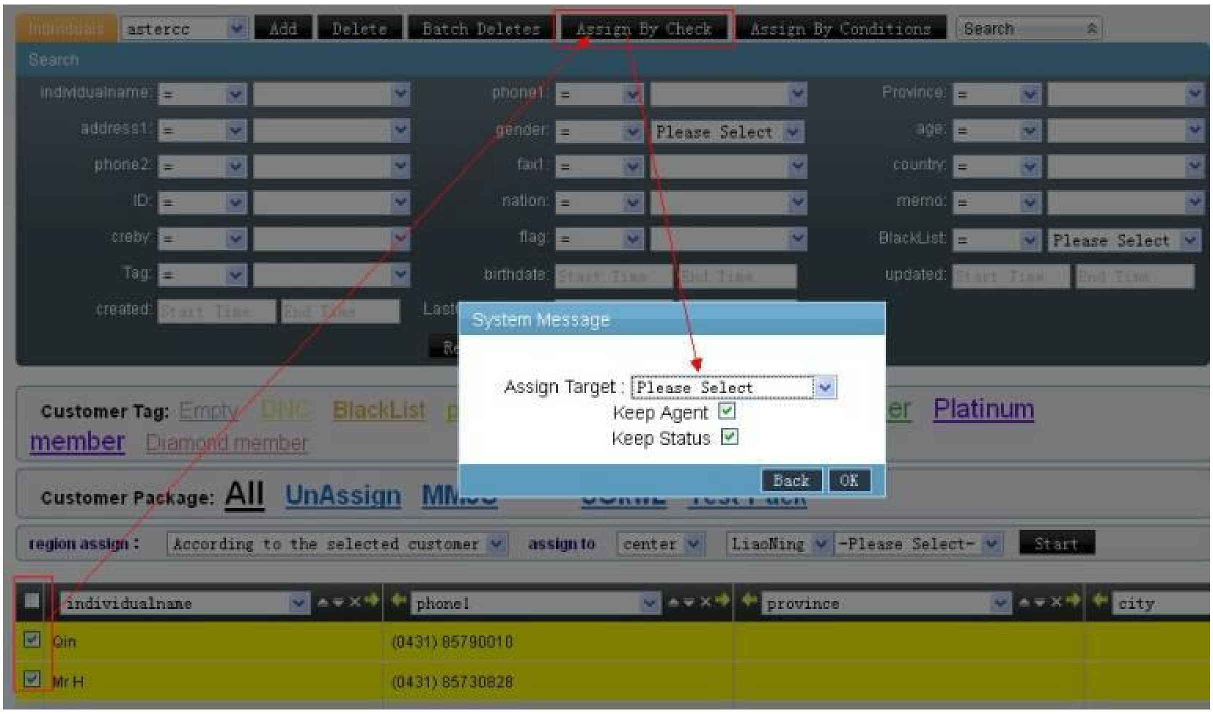
It suggests searching before batch delete. If there are huge customers, please delete them in different times.The suggested max delete customers are 3000 in a time.

Assign Customers

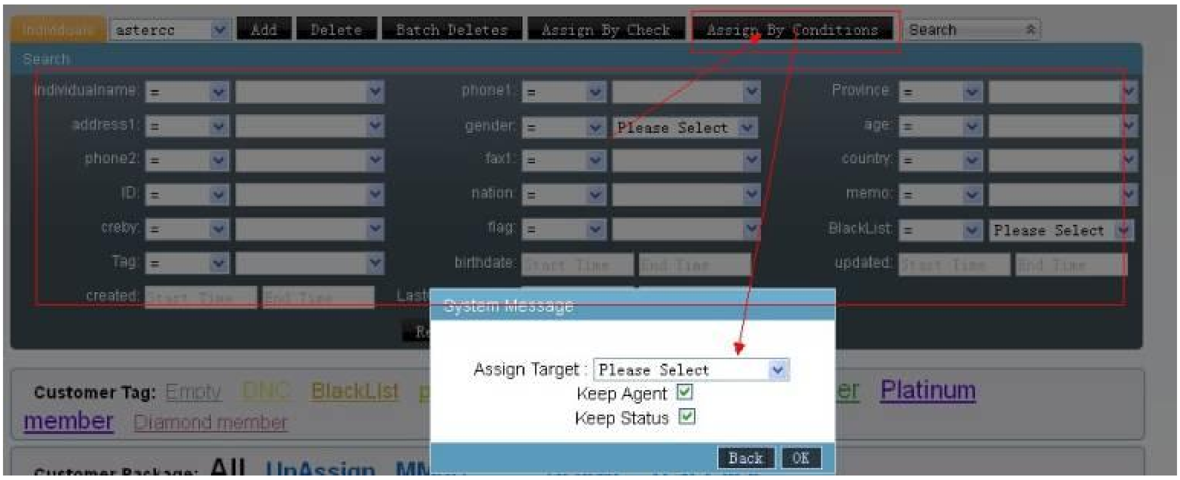
It is for assigning customers to customer package. One customer can only belong to one customer package.If assign a cutomer who has belonged to one customer package, it will resign to this new customer package.

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.

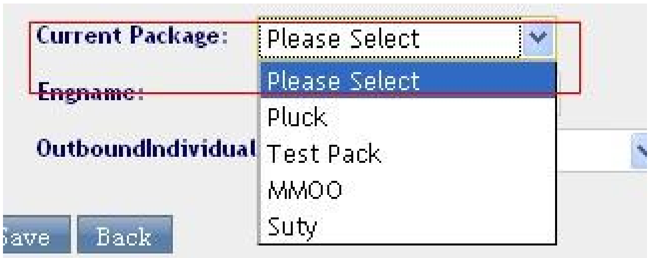


For the abovet two ways, please select assign target:

Keep Agent: Say if customer belongs to A cusomter 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 packageB, 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.



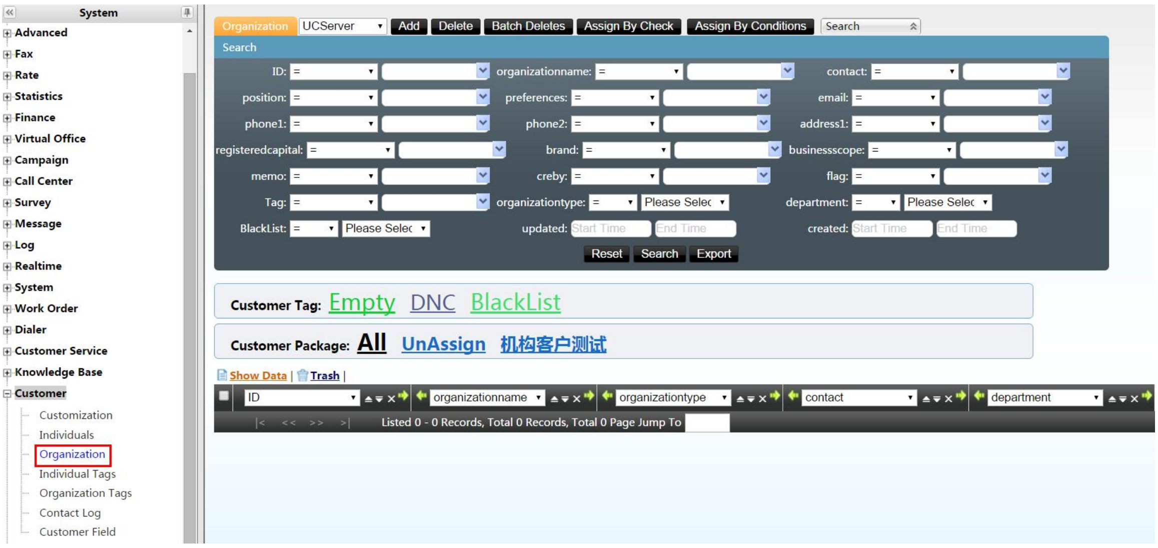
1.2Region Assign

Only region assign system will show bellow fileds. Select customer data to assign region, then click start.

It is a copy of last node customers to next node.

20.3Organization

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



Module Funtion: It is for managing organization customer list.When creat 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 campaingn.

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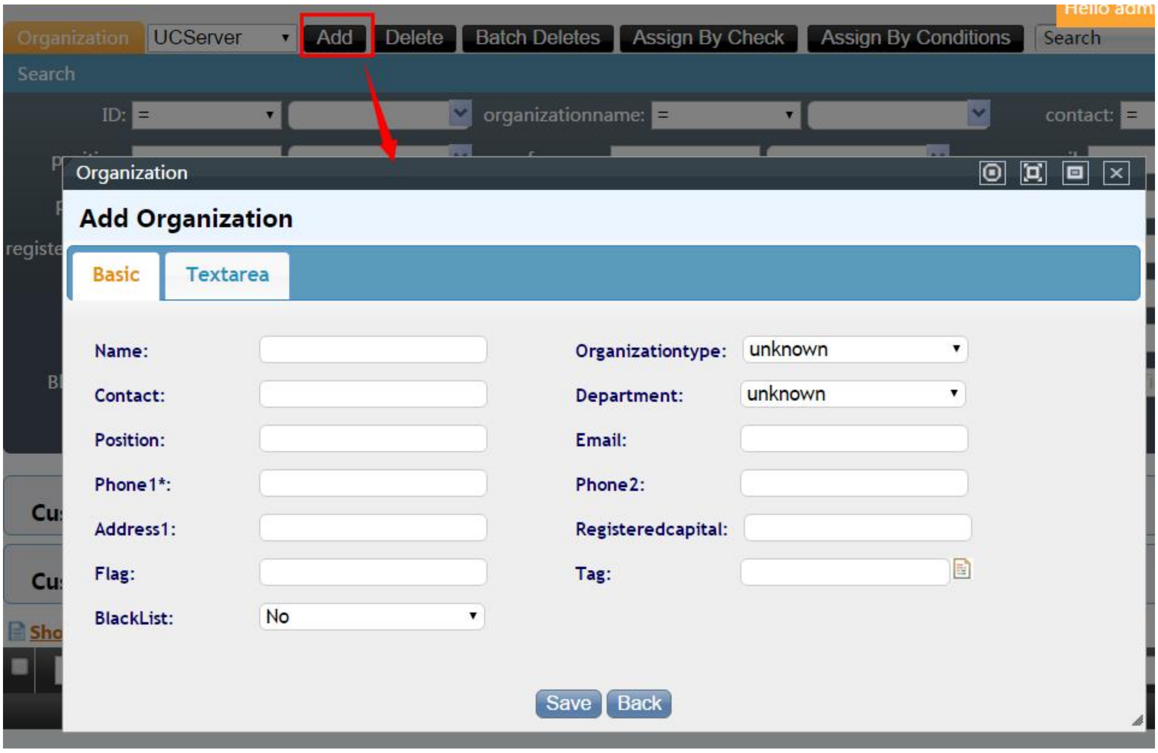
Add



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)

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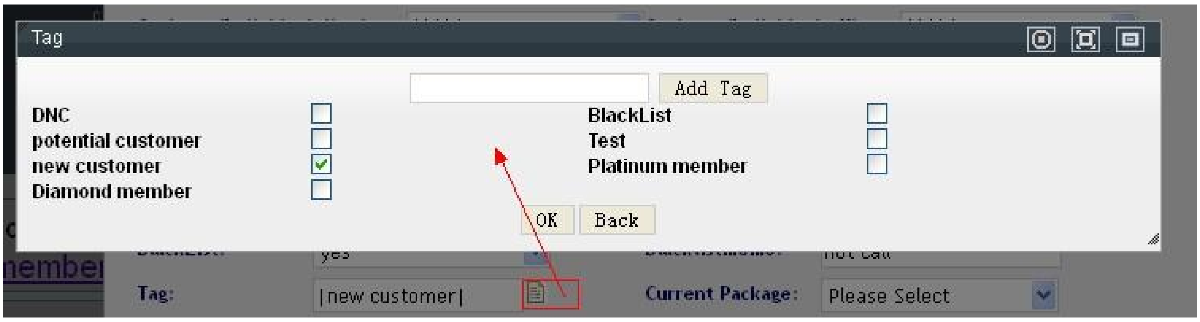
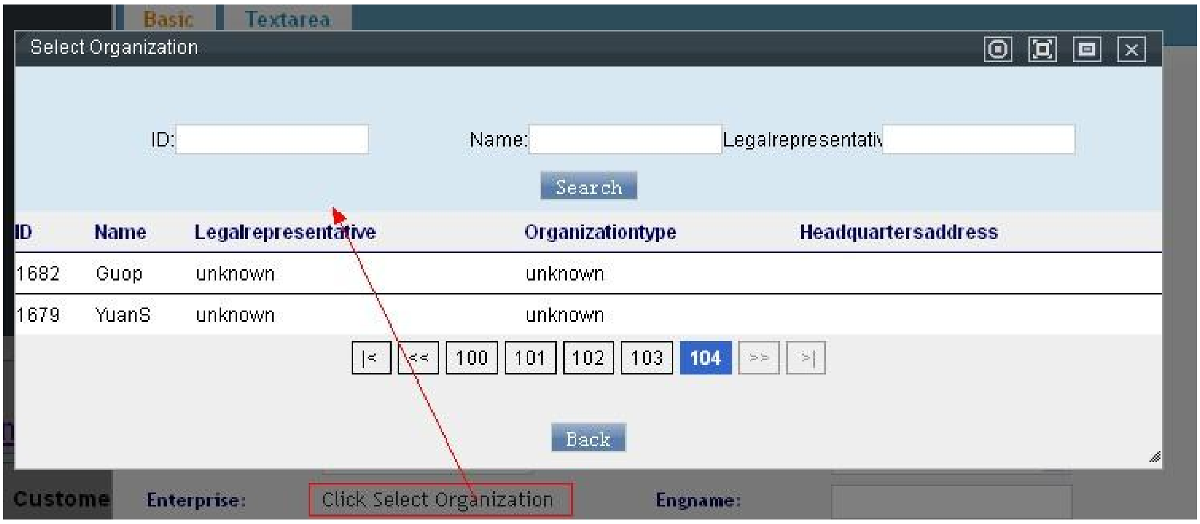
Tag：Click to add a tag for a customer.The available tag are setted under [Customer]->[Organization Tags].





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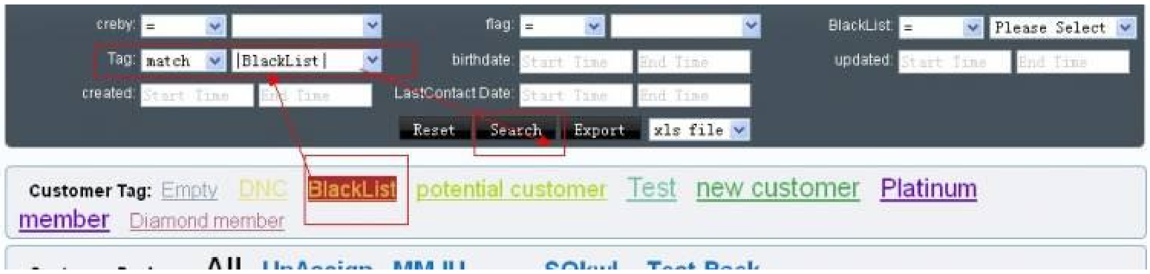
Customer Tag：Click a customer tag to quick search customers belong to this tag.



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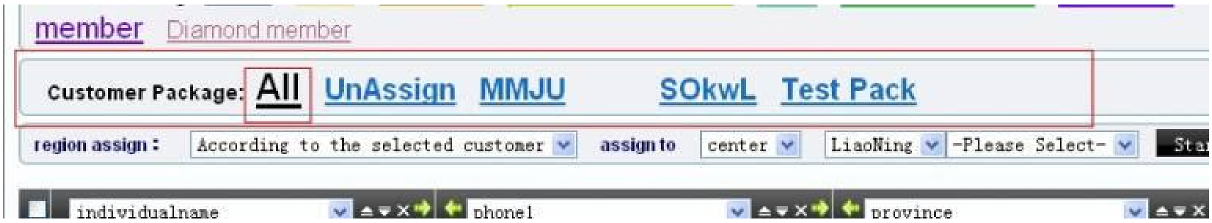

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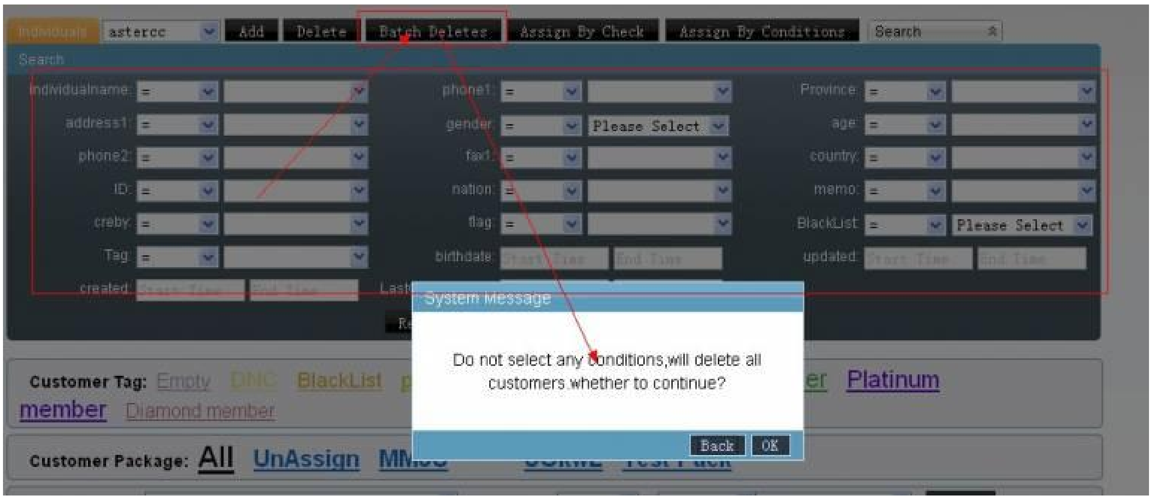
To batch delete customers according to search result.If not select any conditions, it will delete all customers.



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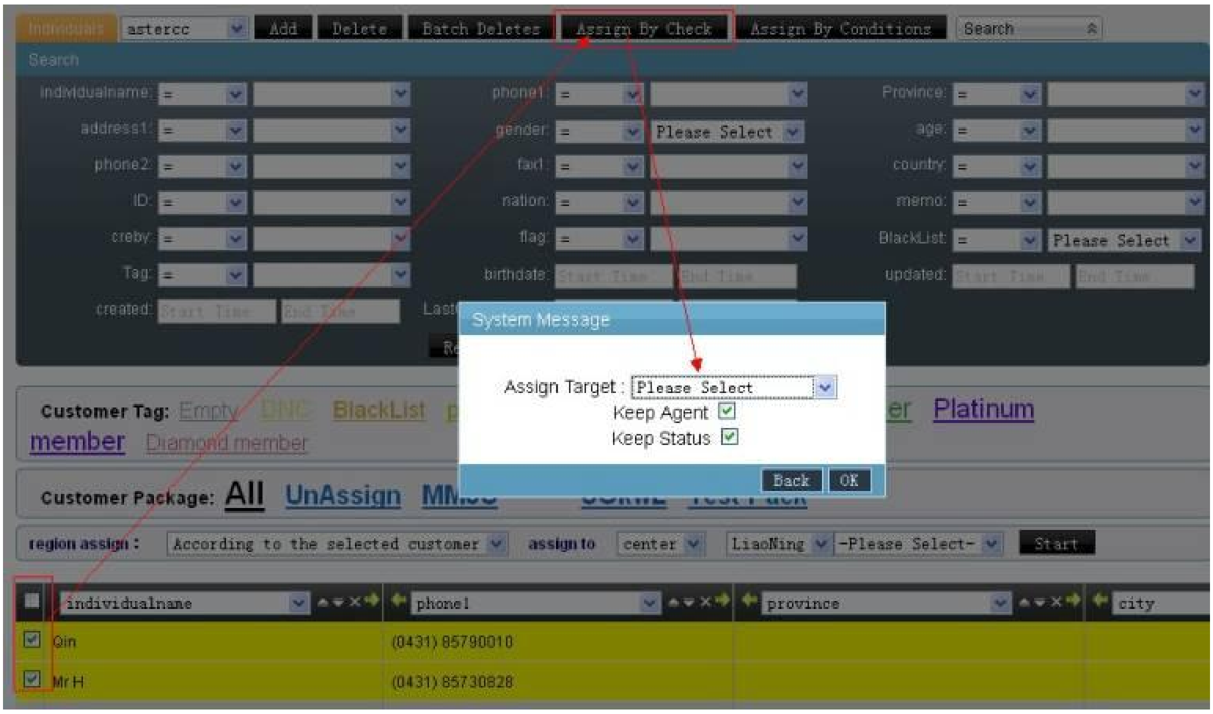

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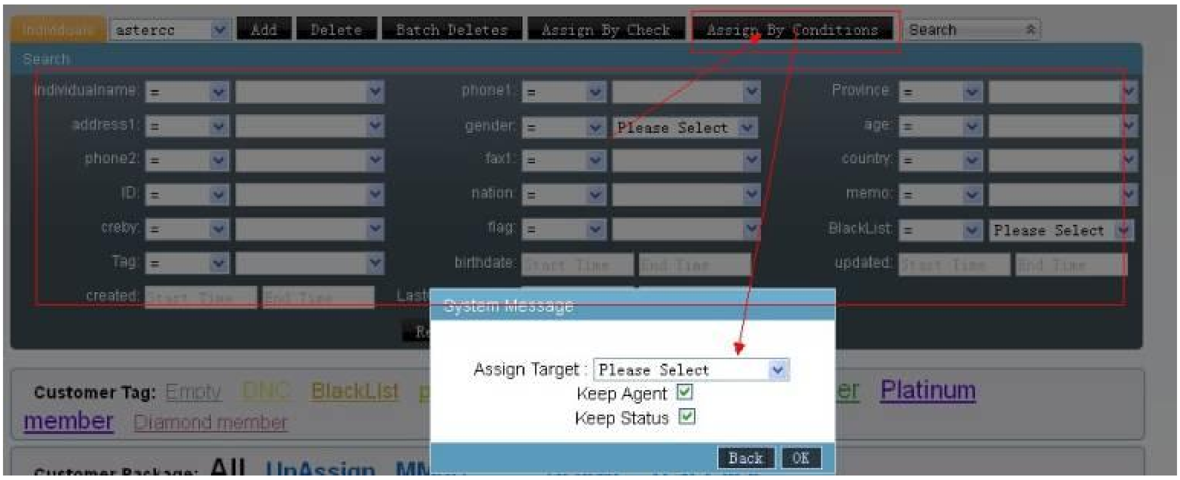

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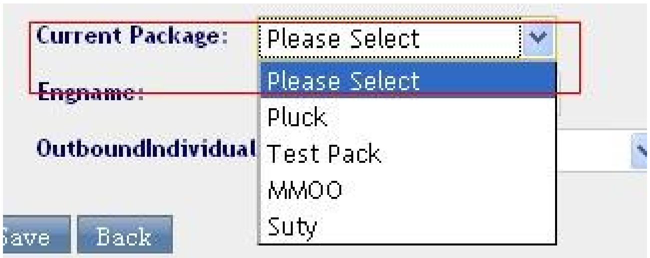


1.4Region Assign

Only region assign system will show bellow fileds. Select customer data to assign region, then click start.

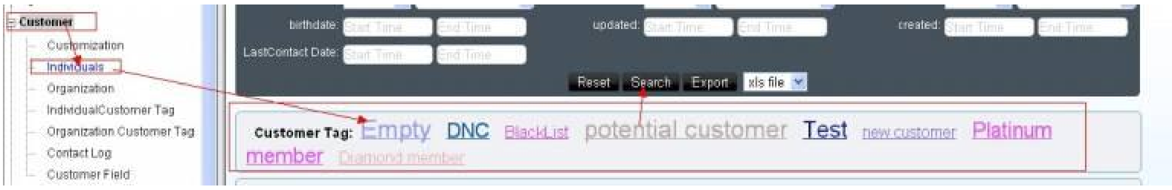
It is a copy of last node customers to next node.

20.4Individual Tag

On the left menu, please go to[**Customer**]–> [**Individual Tag**] to open the page.

Module Funtion: 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.



1.5The tag adding permission

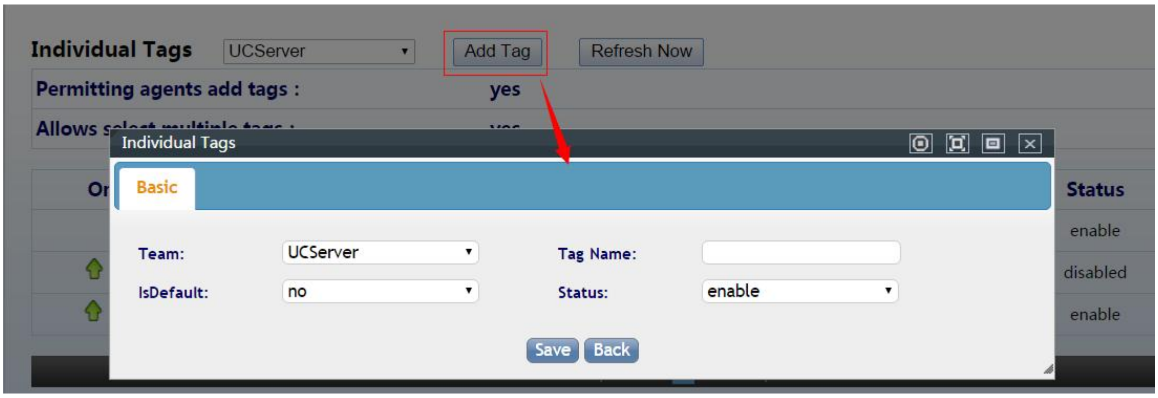
It defines a team's permission:

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 否 depending on your business. If the tag for processing, choose No. If the tag for customer description, choose Yes.

1.6Add Tag

Click Add Tag to add a new individual tags



Team：Which team this tag will apply to;

Tag Name：Name this tag;

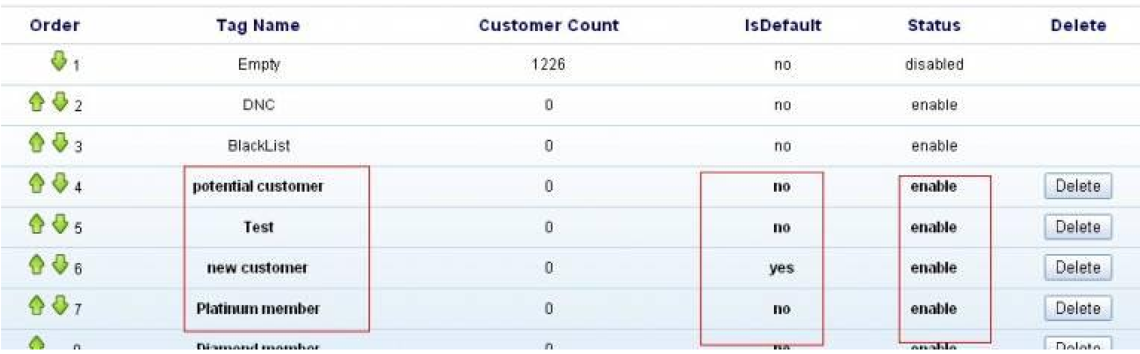
Is Default：If set deault, the system will add this tag to imported customers automatically.In addition, when adding a new customer, this tag is clicked by default.

If set No, then a team can only have one default tag.

Status：Only when enable will this tag applying to customer data.

1.7Edit Tag

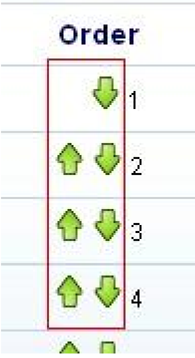
Double click the black tag to edit.



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.



1.8Default 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.

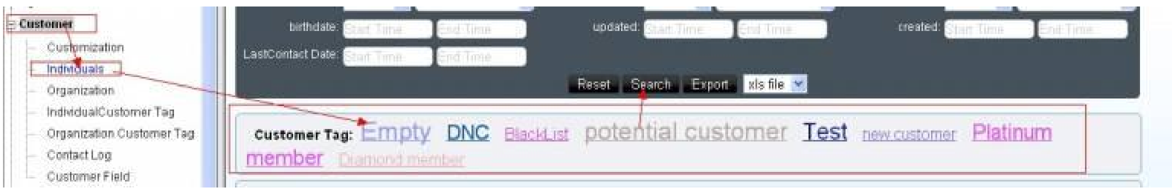
The default tags can not be deleted and edited, but you can change their orders.

20.5Organization 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.



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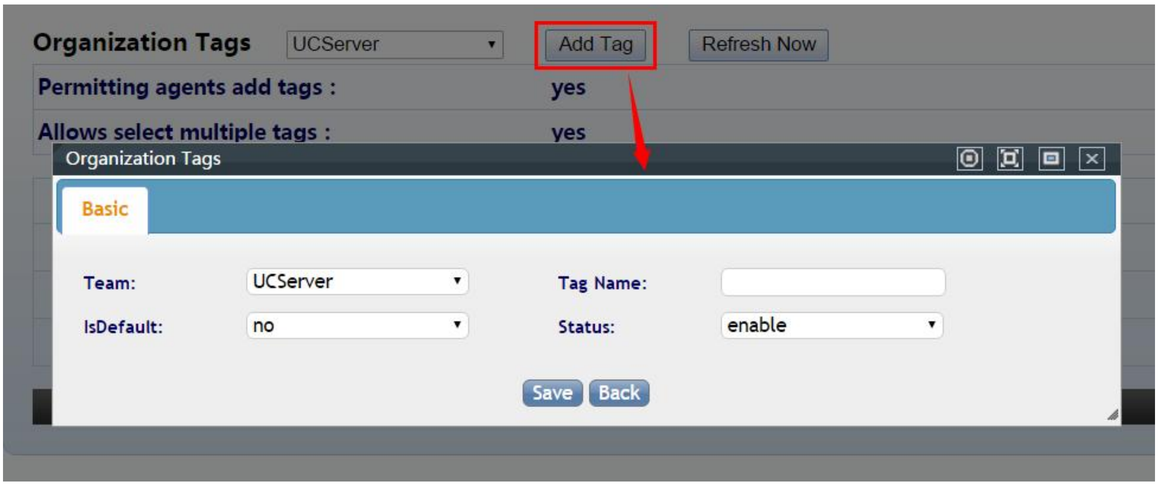
1.10Add Tag

Click Add Tag to add a new individual tags



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Tag Name: Name this tag;

Is Default: If set deault, 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.

1.11Edit 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 orgnization 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

1.12Default Tag

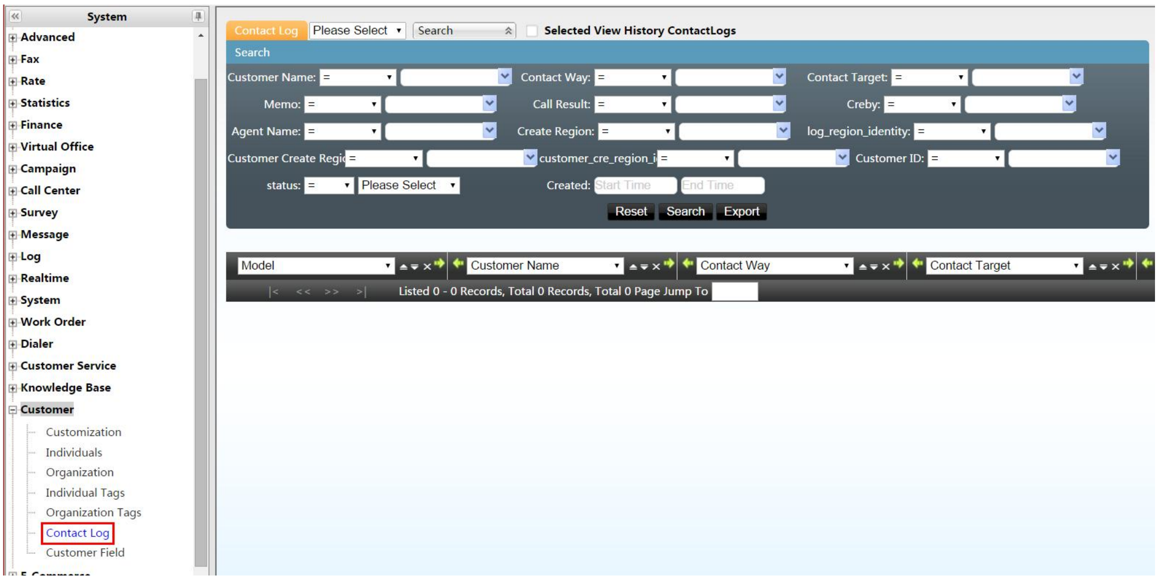
Empty：To search customers who without any tag. The empty tag is not available for selecting.When there is no tag for a customer, you can search it through tag= empty.

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.

20.6Contact Log

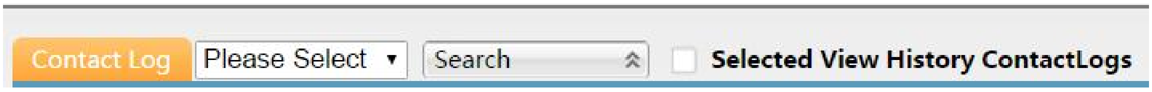
On the left menu, please go to[**Customer**]–> [**Contact Log**] to open the page.



Module Funtion: 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".



1.13Search 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.

Ceated time: The time when create this log;

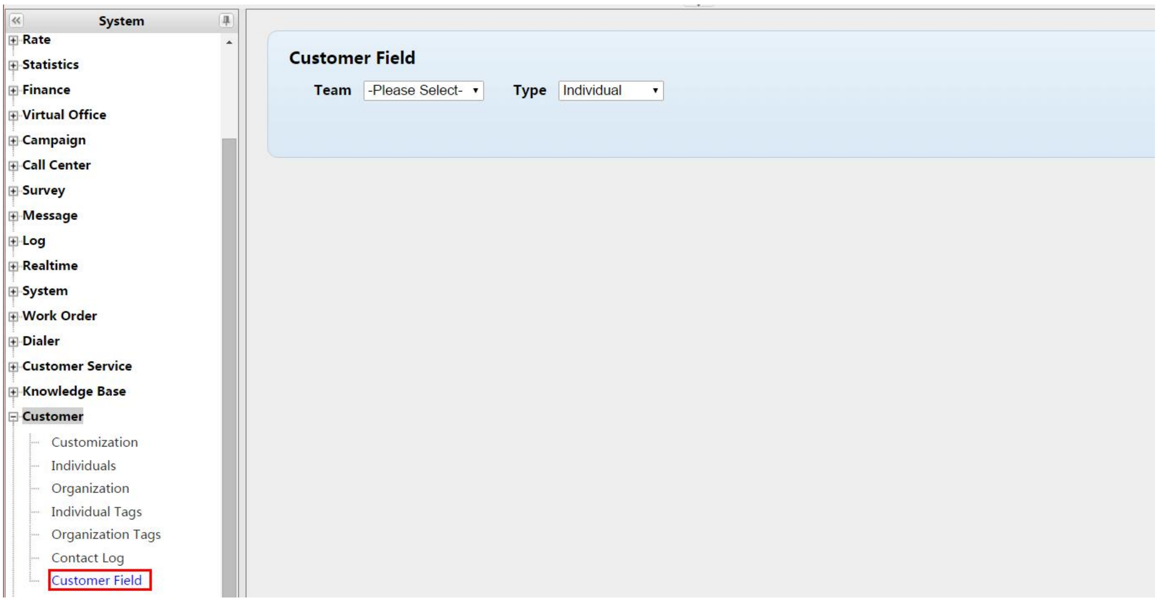
Create Region: Only available for region configuration system. Where this log created.

Customer Creat Region: Only available for region configuration system. Where this log created.Where this customer belongs to.

Customer cre region ID: Only available for region configuration system. Where this log created.The ID of this customer in this region.

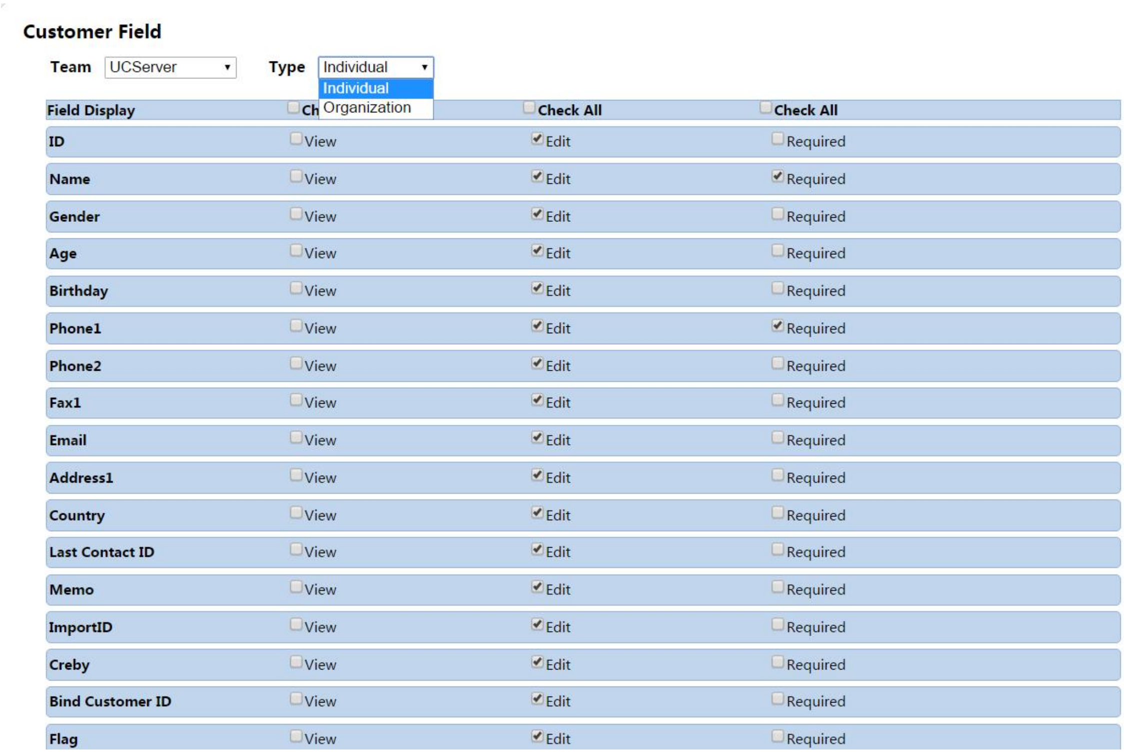
20.7Customer Field

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 fileds to show and to be edited.

Firstly, please choose a team an the type.



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.

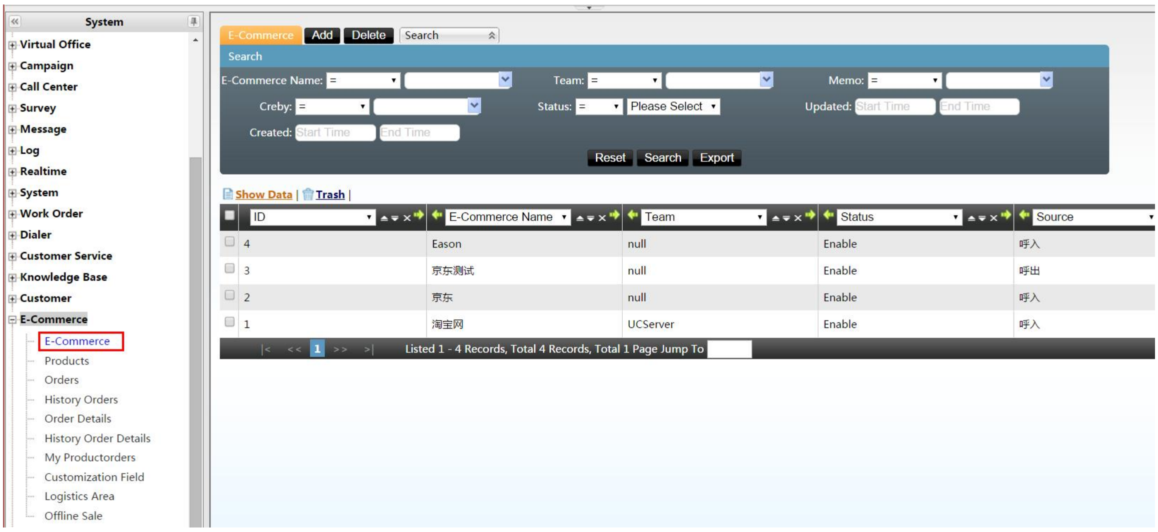
Required: Whether to set this field as required field when adding and editing customer info or not.

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

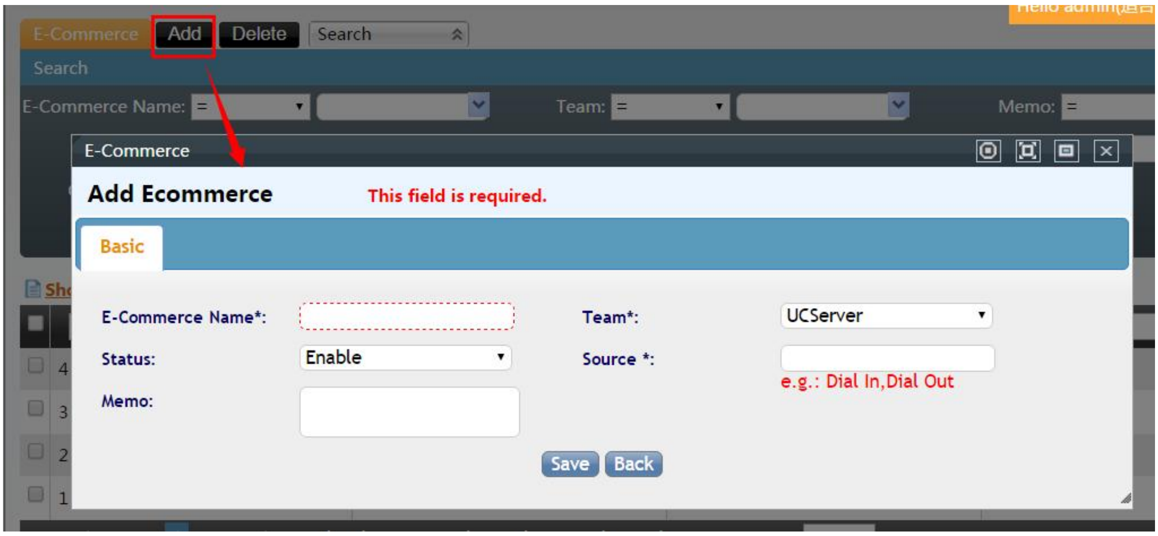
21.1E-Commerce

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;

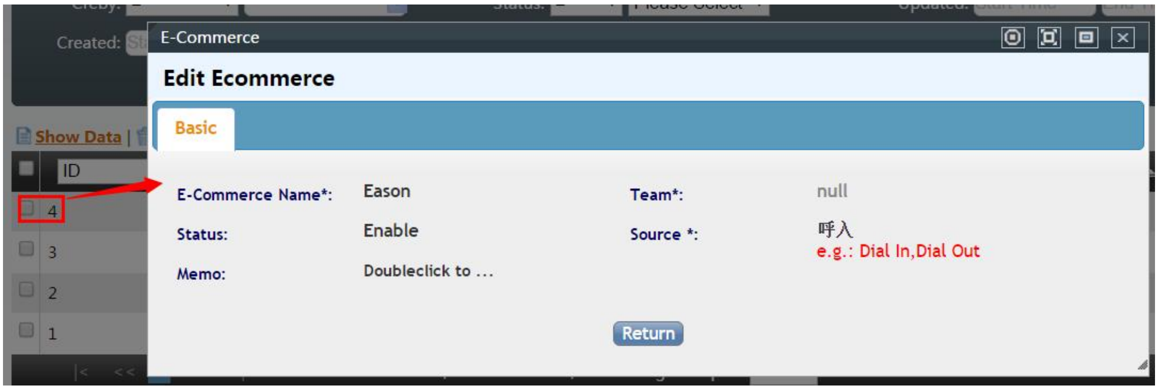
Source: How to get this E-Commerce, eg, from dial in customer or from dial out compaign;

Memo: Give a memo for E-Commerce;

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

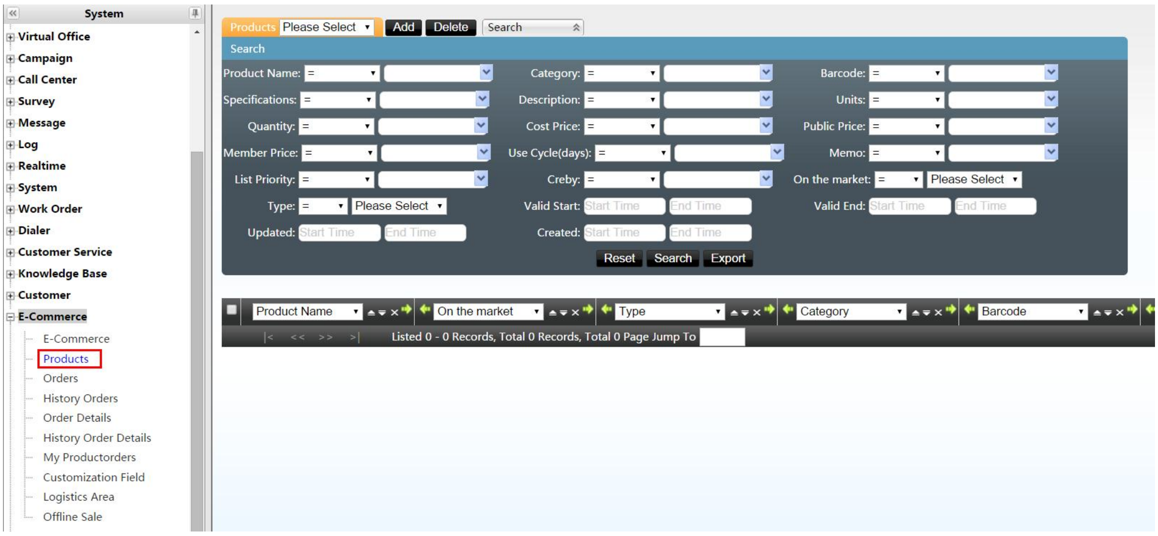
Edit

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



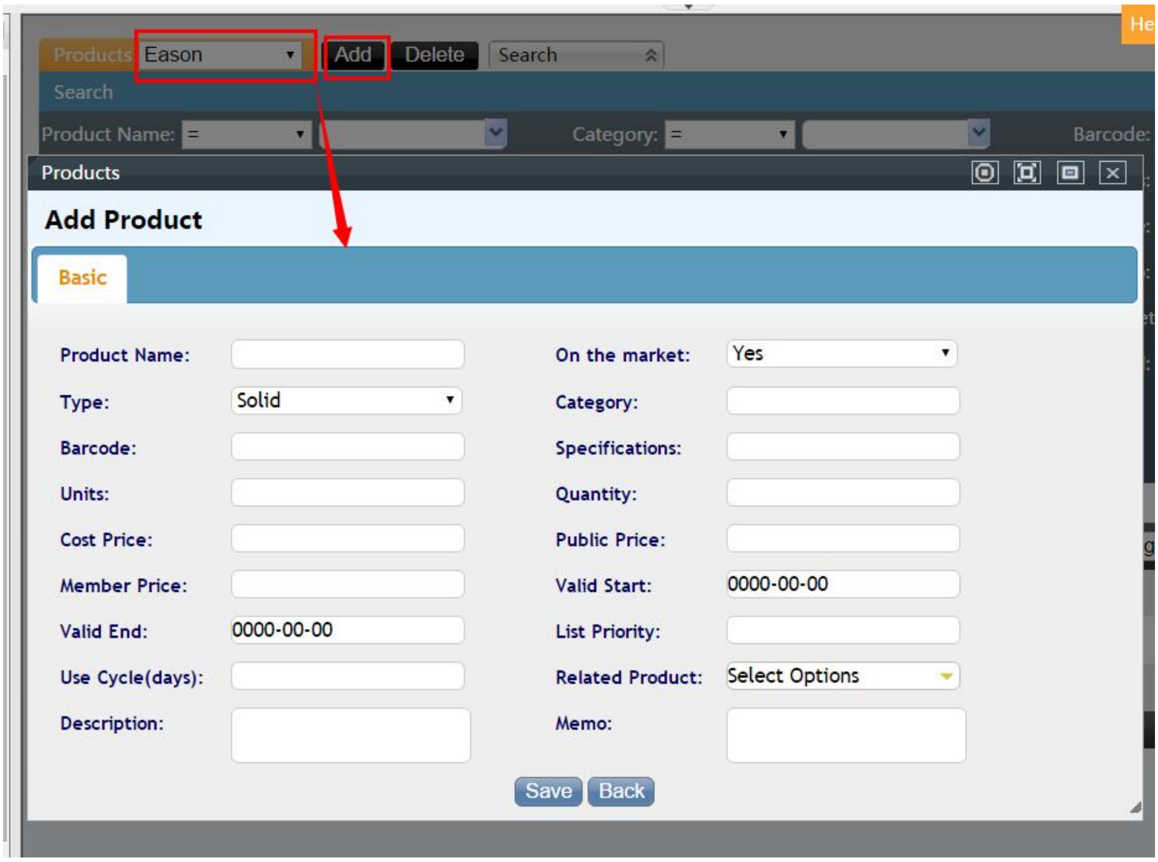
21.2 Product

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:



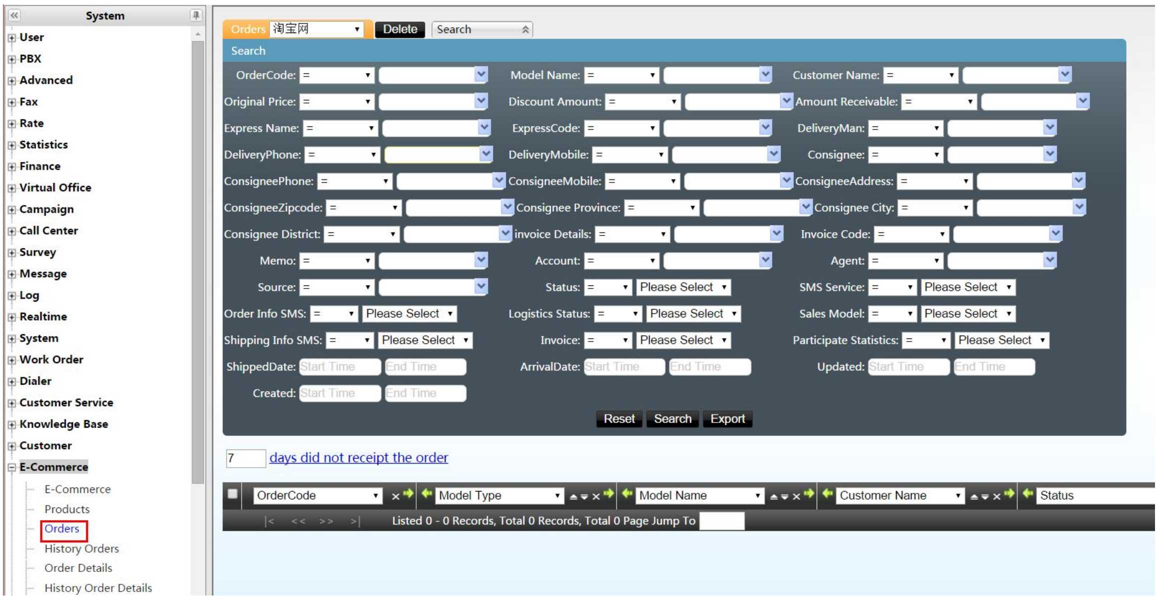
Product Name：Name this Product;
On the market： Whether the manufacturer has on the market or not;
Type：What kind of product it is,Solid,Virtual or Service;
Category：What is its category;
Barcode：The product's barcode。
Specification：The specification of this product;
Unit：The unit of this product, piece, 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.

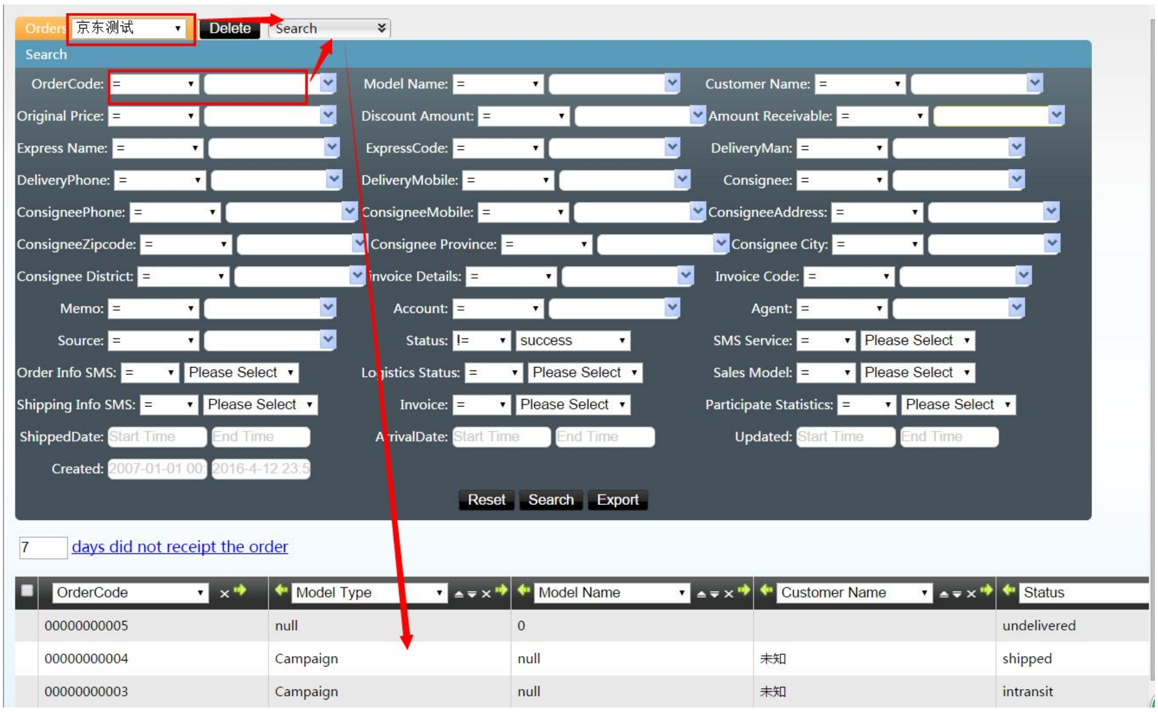
21.3Orders

On the left menu, please go to[**E-Commerce**]-> [**Orders**] to open the page.



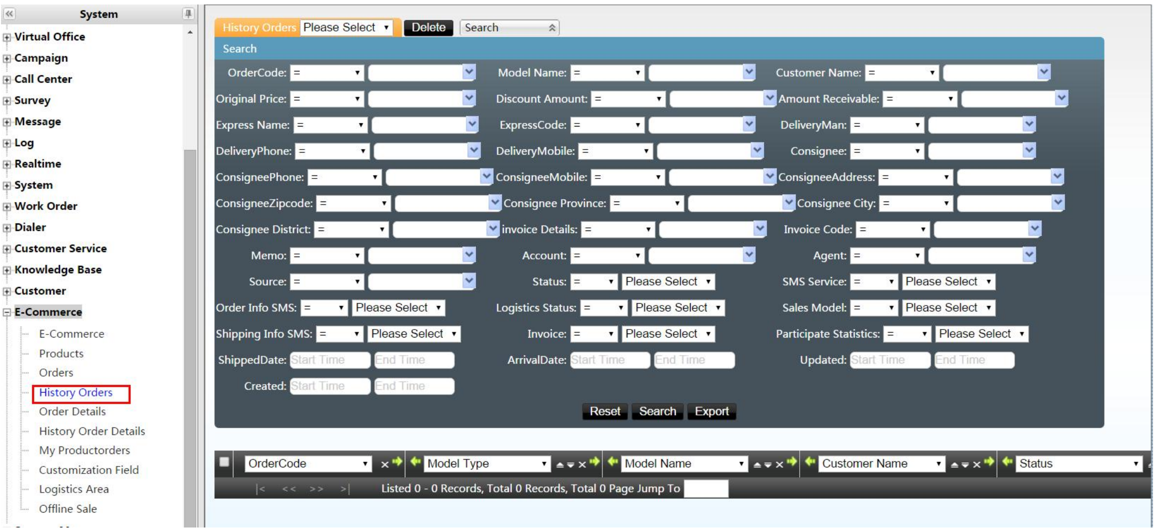
Select an E-commerce and define on the search fields, then press Search, it will show all current orders belong to this team.

If no team selected, it will show all current orders in the system:



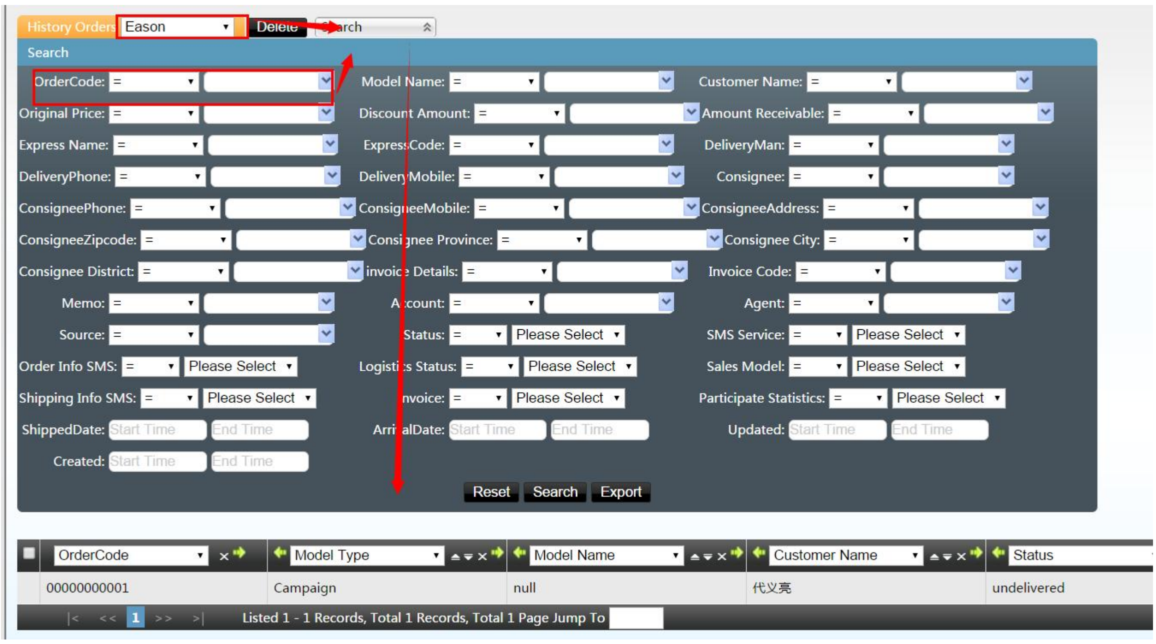
21.4History Orders

On the left menu, please go to[**E-Commerce**]-> [**History Orders**] to open the page.



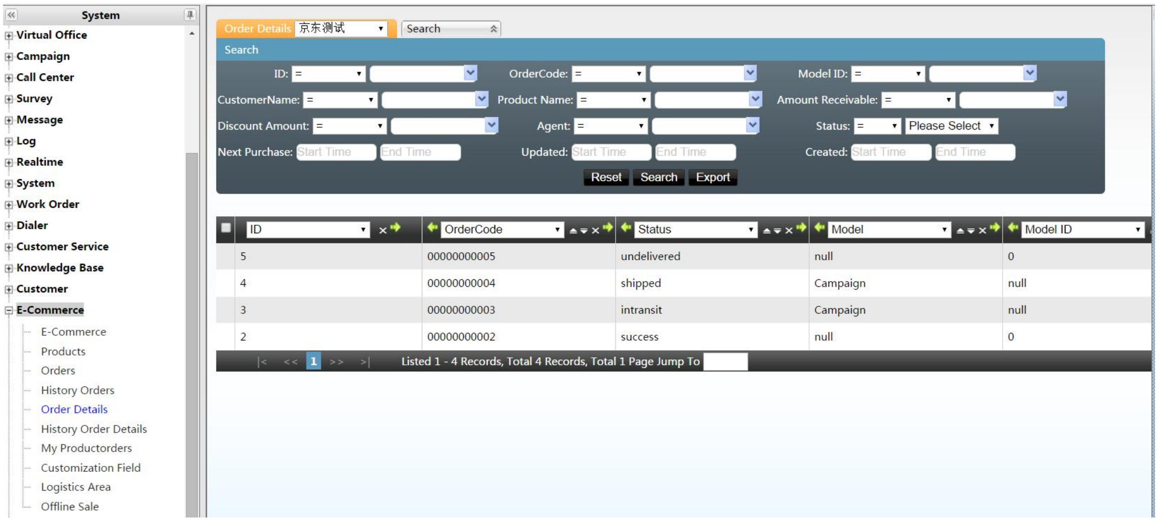
Select an E-commerce and define on the search fields, then press Search, it will show all history orders belong to this team.

If no team selected, it will show all history orders in the system:



21.5Order Detail

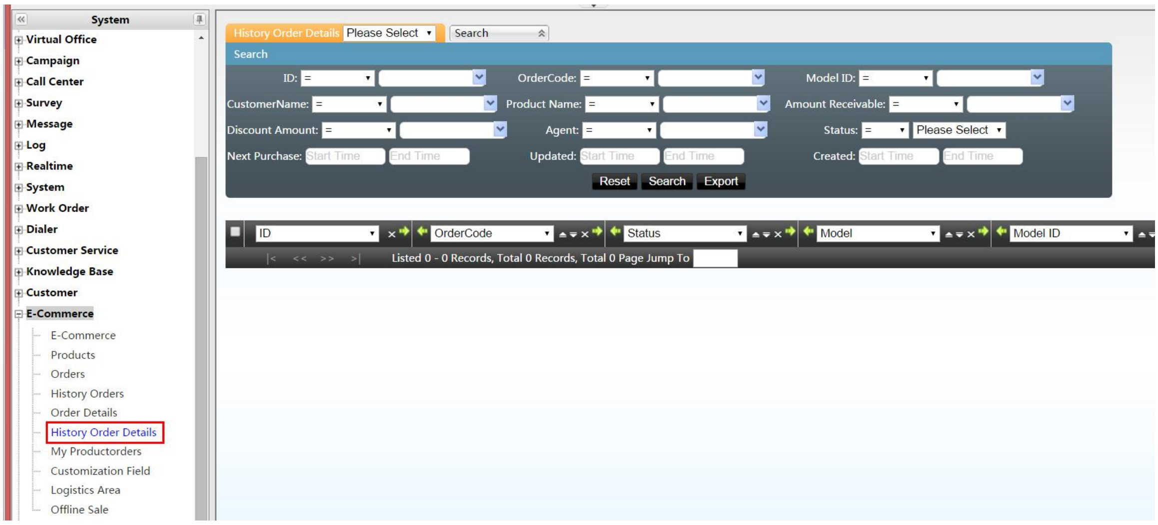
On the left menu, please go to[**E-Commerce**]–> [**Order Detail**] to open the page.



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.

21.6History Order Details

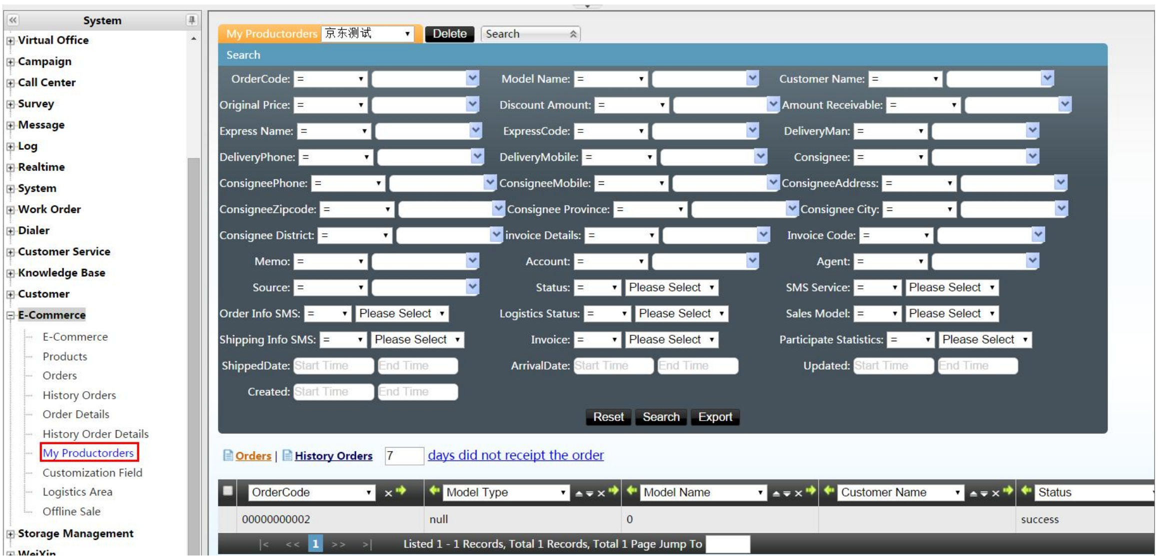
On the left menu, please go to[**E-Commerce**]–> [**History Order Detail**] to open the page.



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.

21.7My Product Orders

On the left menu, please go to[**E-Commerce**]–> [**My Product Orders**] to open the page.

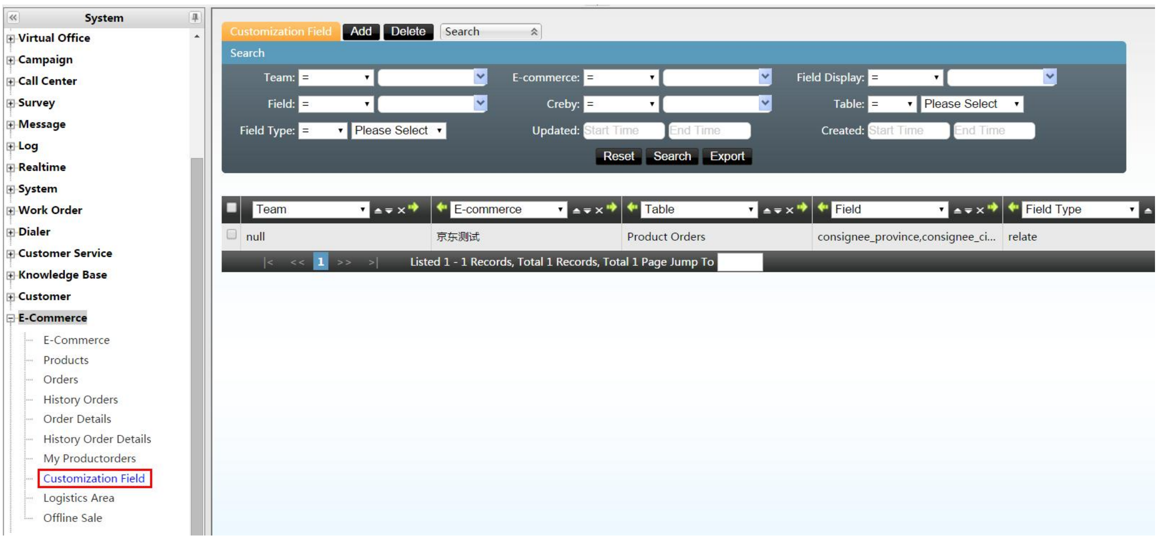


Select an E-commerce and define on the search fields, then press Search, it will show all orders detail belong to this team.

If no team selected, it will show all orders detail in the system.

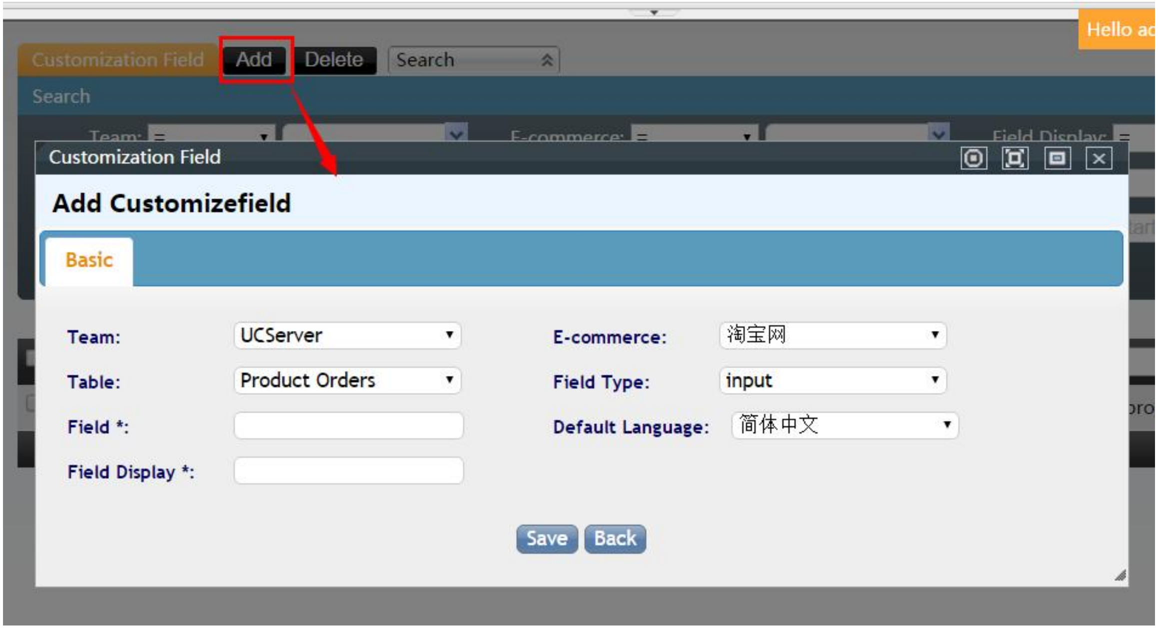
21.8Customization Field

On the left menu, please go to[**E-Commerce**]–> [**Customization Field**] to open the page.



Add

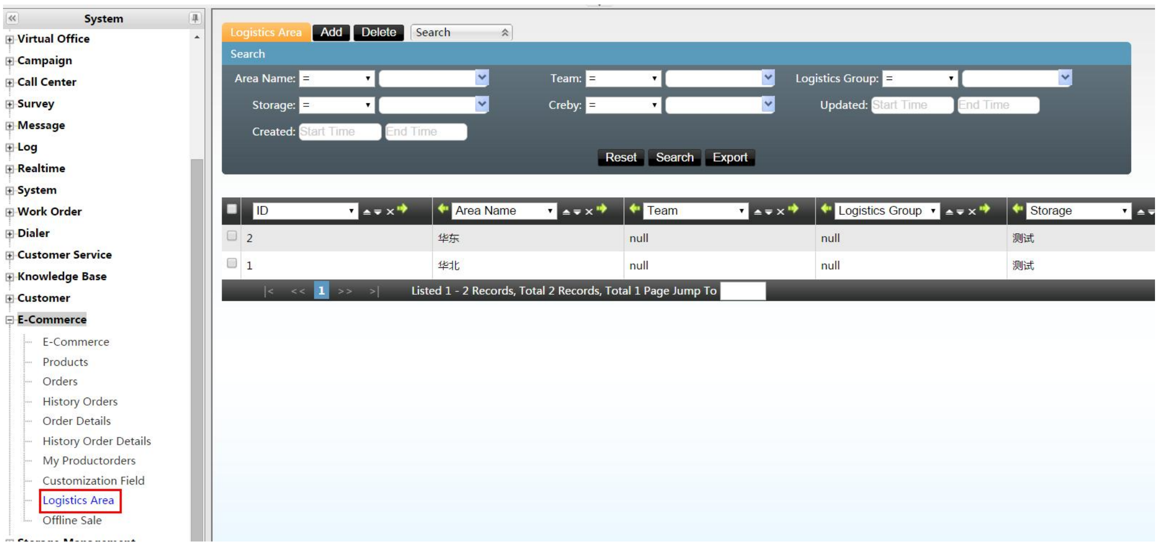
Click Add to open the add Customization Field:



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;
Defualt Language：The default language of it;
Field Display：The other display language

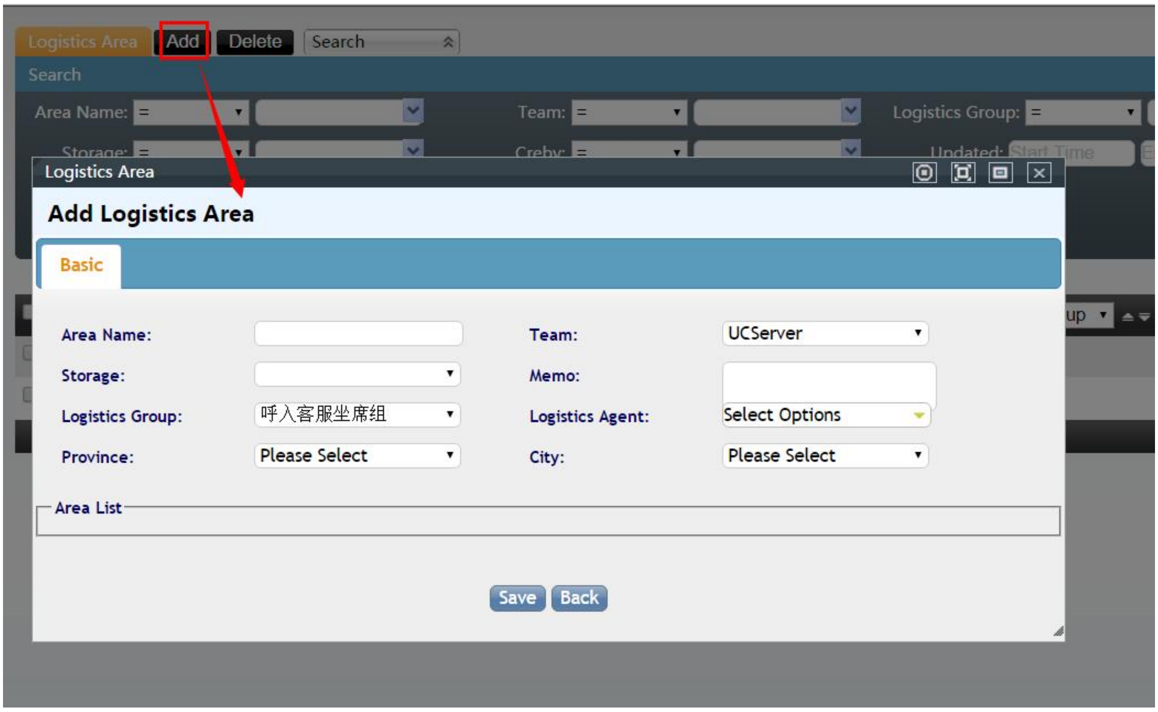
21.9Logistics Area

On the left menu, please go to[**E-Commerce**]-> [**Logistics Area**] to open the page.



Add

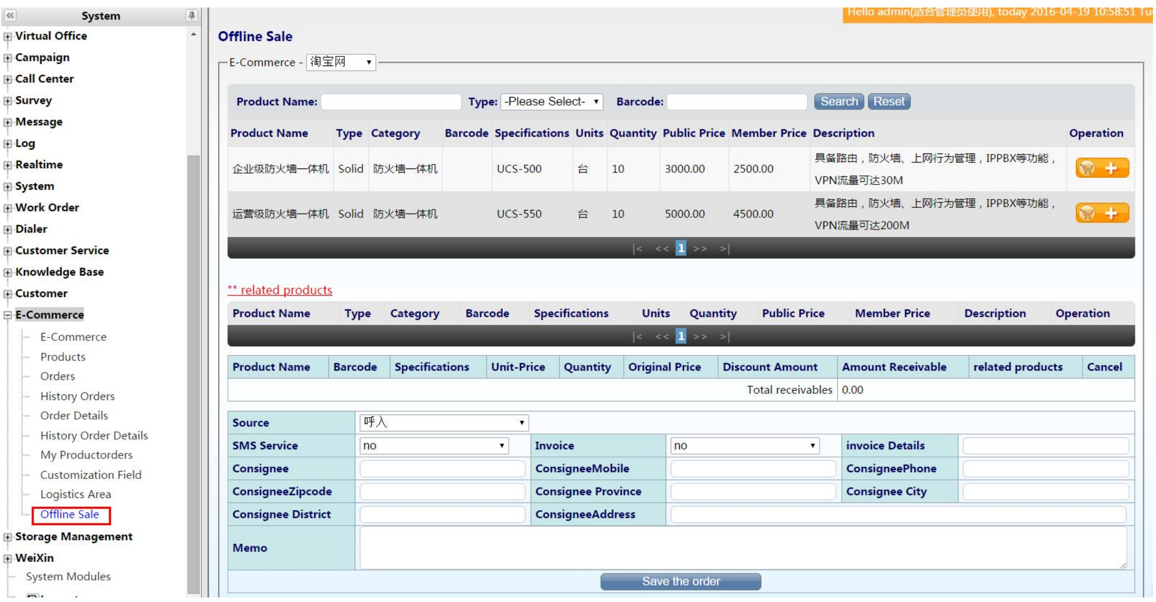
Click Add to open the add logistics area:



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 provinece;
City：Select a city;
Click**[Save]**when finishing the page, then it will show the newly added data on the page.

21.10Offline Sale

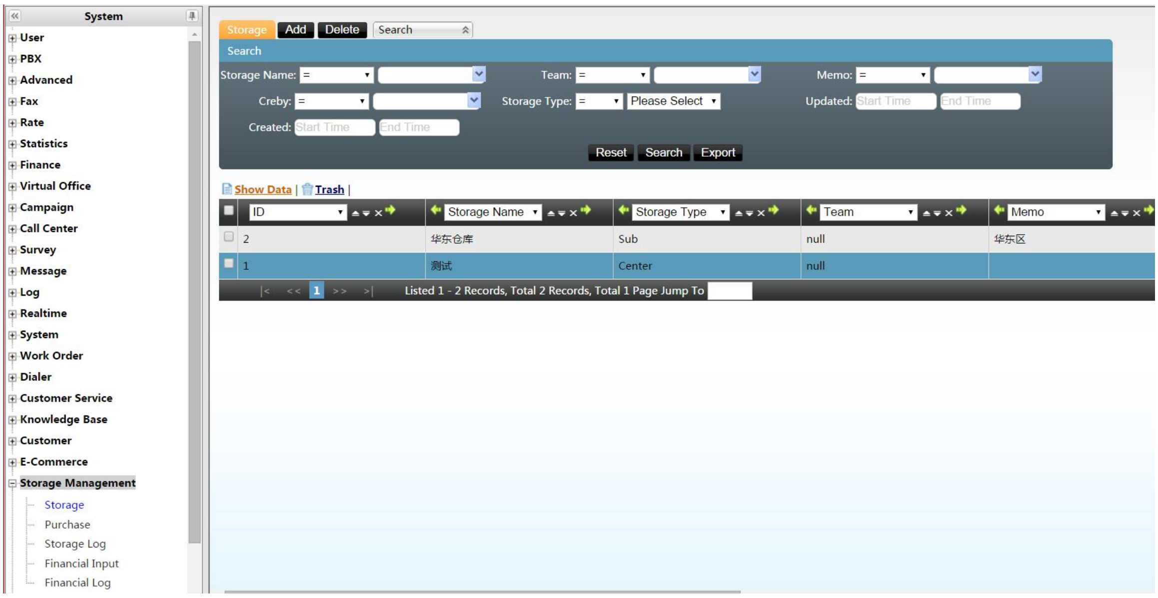
On the left menu, please go to[**E-Commerce**]–> [**Offline Sale**] to open the page.



22 Storage Management

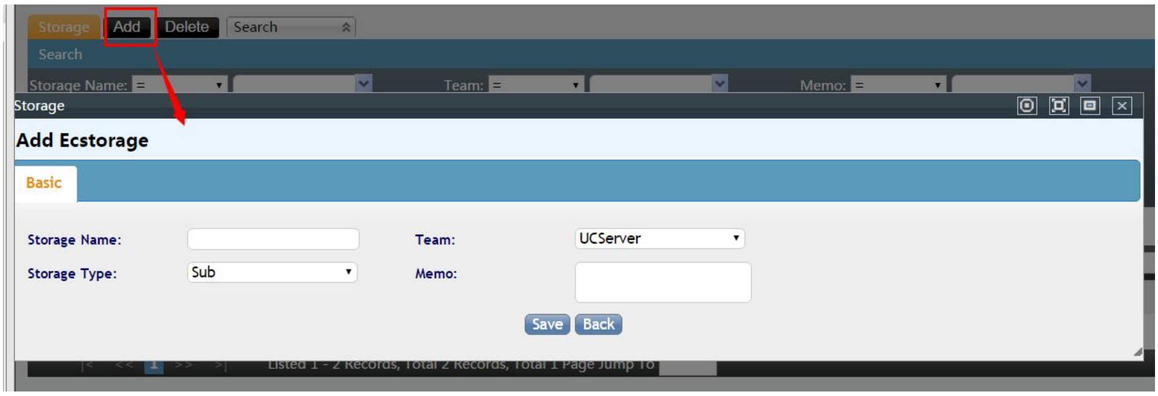
22.1Storage

On the left menu, please go to[**Storage Management**]–> [**Storage**] to open the page.



Add

Click Add to open the add ecstorage page

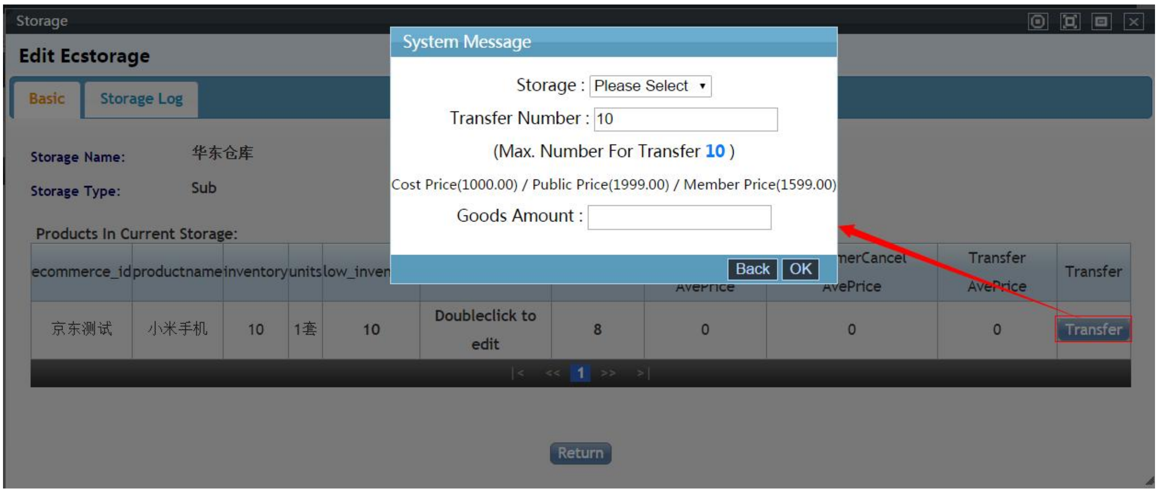


Storage Name：Name this storage;
Team：Which team this storage belongs to;
Storage Type：What kind of storage it is, center or sub; A team can only have one center storage, but can have several sub-storage.
Memo：Give a memo for this storage;
Click**[Save]**when finishing the page, then it will show the newly added data on the page.

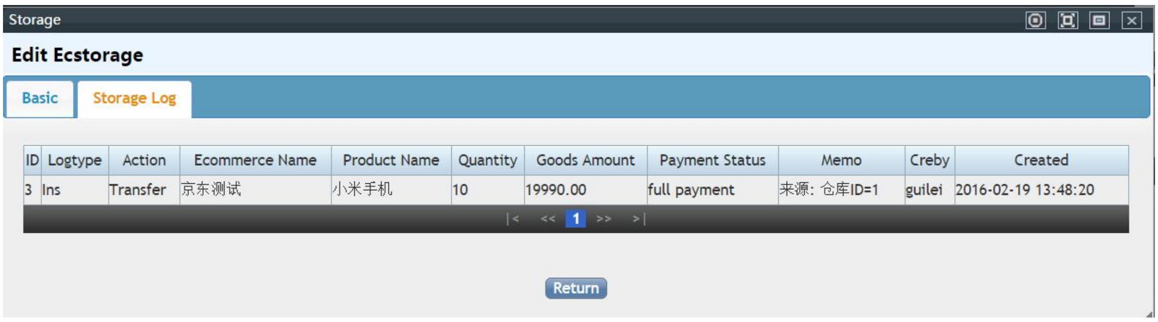
Edit

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 transfter them into another storage:

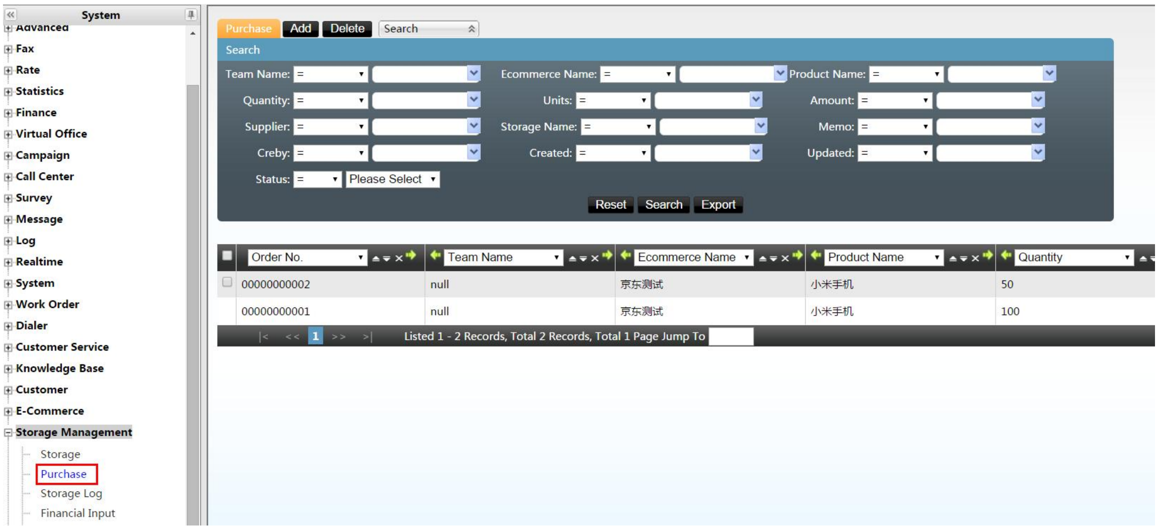


Storage: Select a storage name;
Transfer Number: How many products will be transferred;
Good Amount: How much these transferred products cost;
On the Storage Log page, it shows more info about this storage:



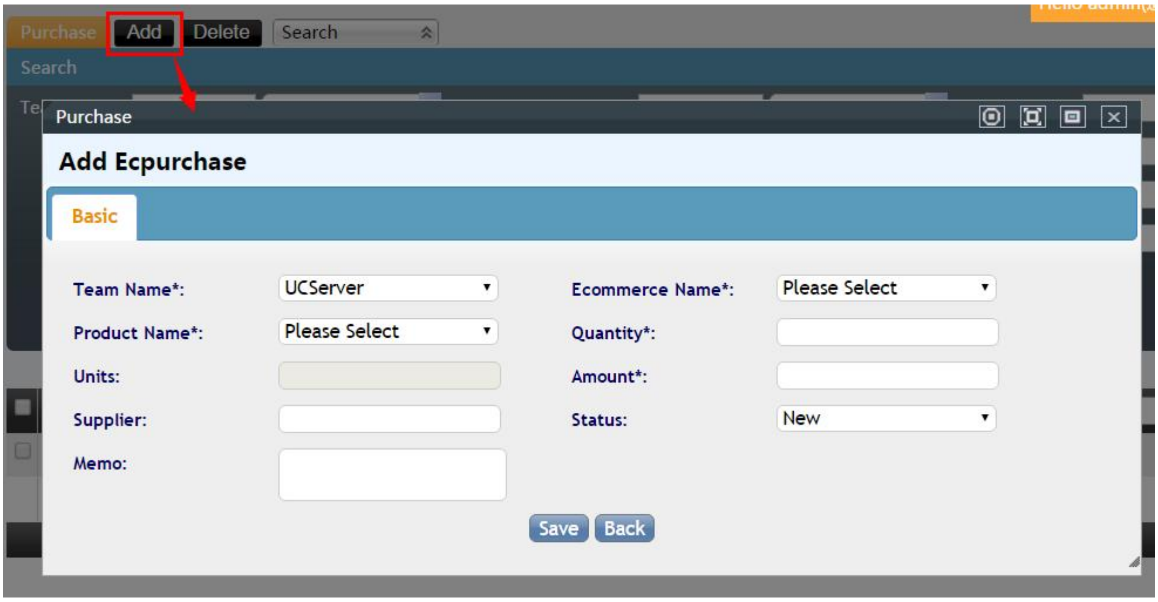
22.2Purchase

On the left menu, please go to[**Storage Management**]–> [**Purchase**] to open the page.



Add

Click Add to open the add ecstorage page



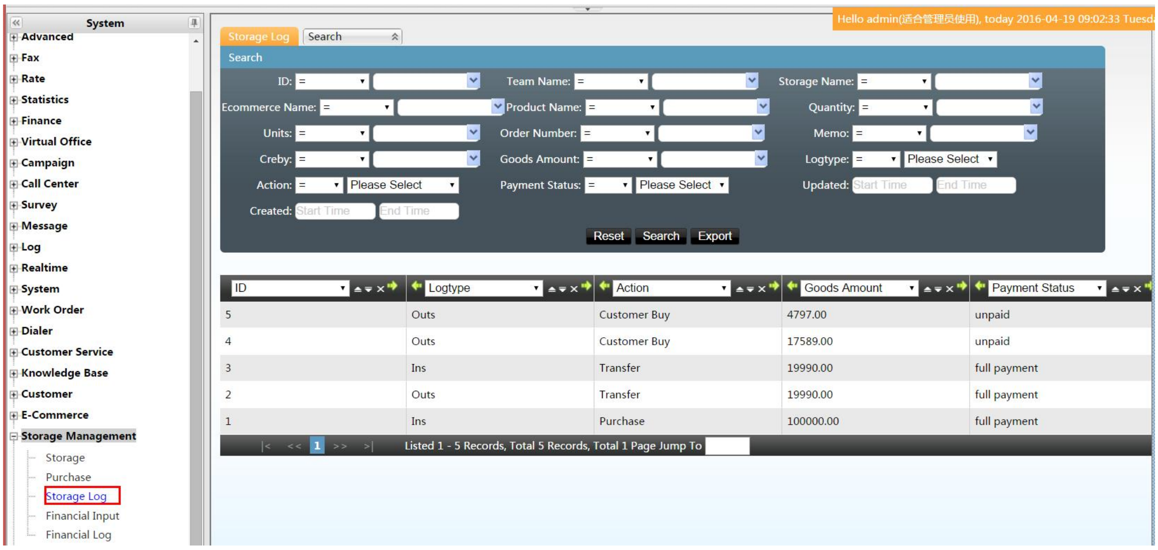
Team Name：Which team this purchased product belongs to;
Ecommerce Name：Which ecommerce this purchased product belongs to;
Product Name: Select a product name;
Quantity：HowThe quantity of purchased product;
Units：What is the unit;
Amount：How much cost;
Supplier：Purchase from which supplier;
Status：Select 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.

22.3Storage Log

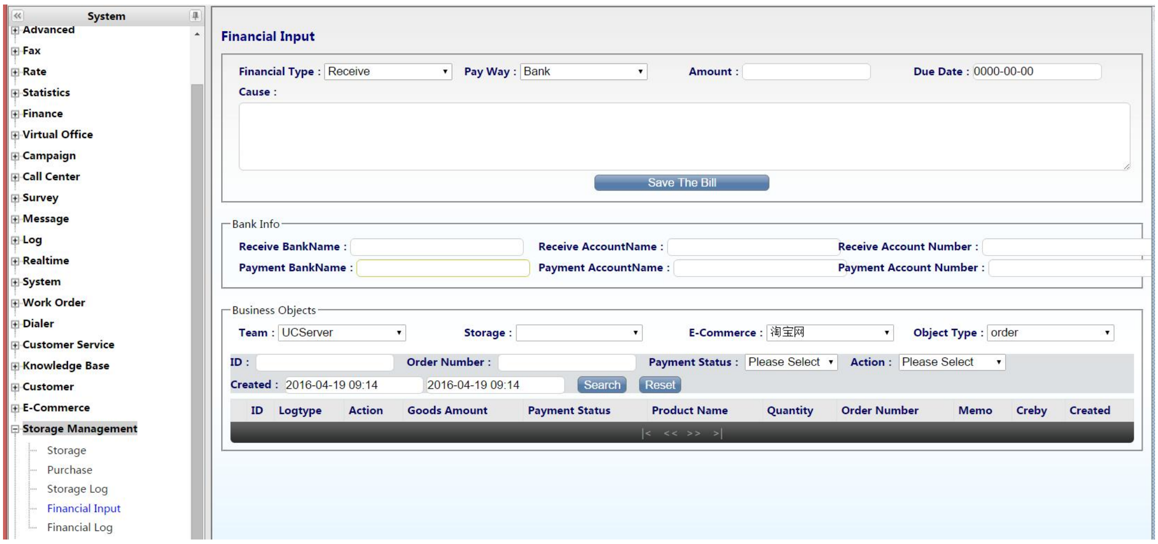
On the left menu, please go to[**Storage Management**]–> [**Storage Log**] to open the page.



This page shows the the storage log, please double click one data to check detailed info:

22.4Financial Input

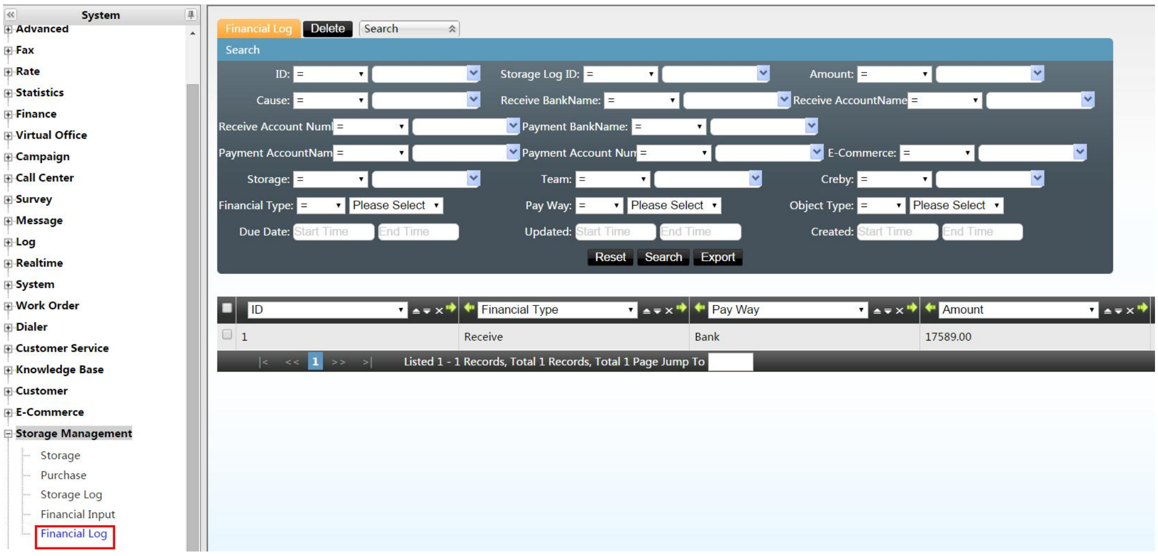
On the left menu, please go to[**Storage Management**]–> [**Financial Input**] to open the page.



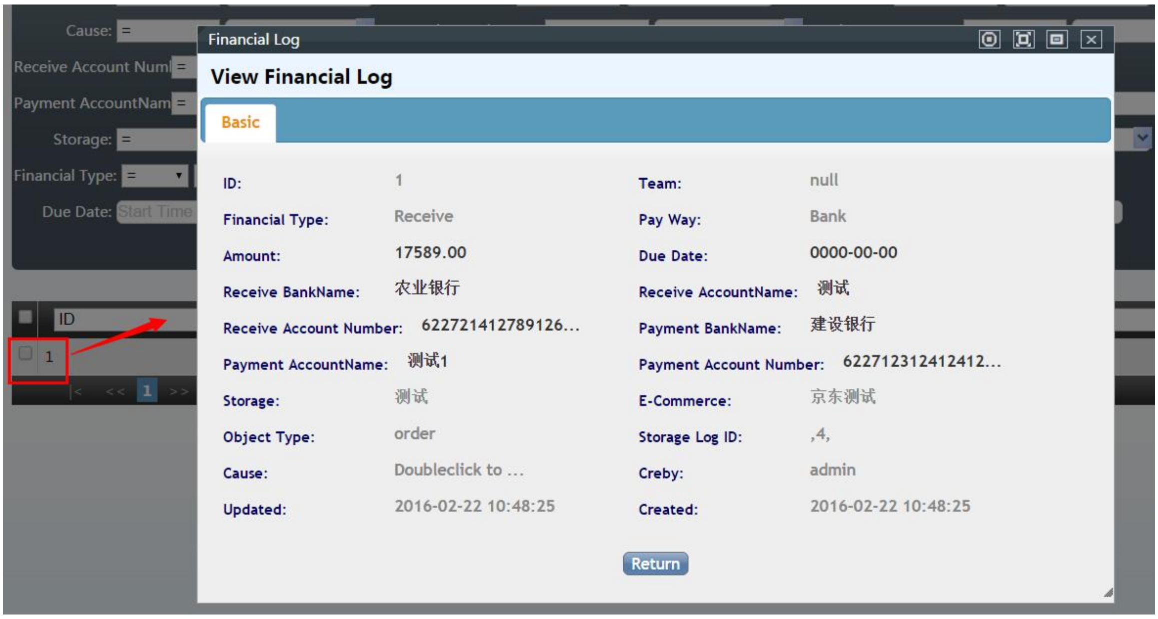
Please write down the detail financial info of a purchase.

22.5Fiancial 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.



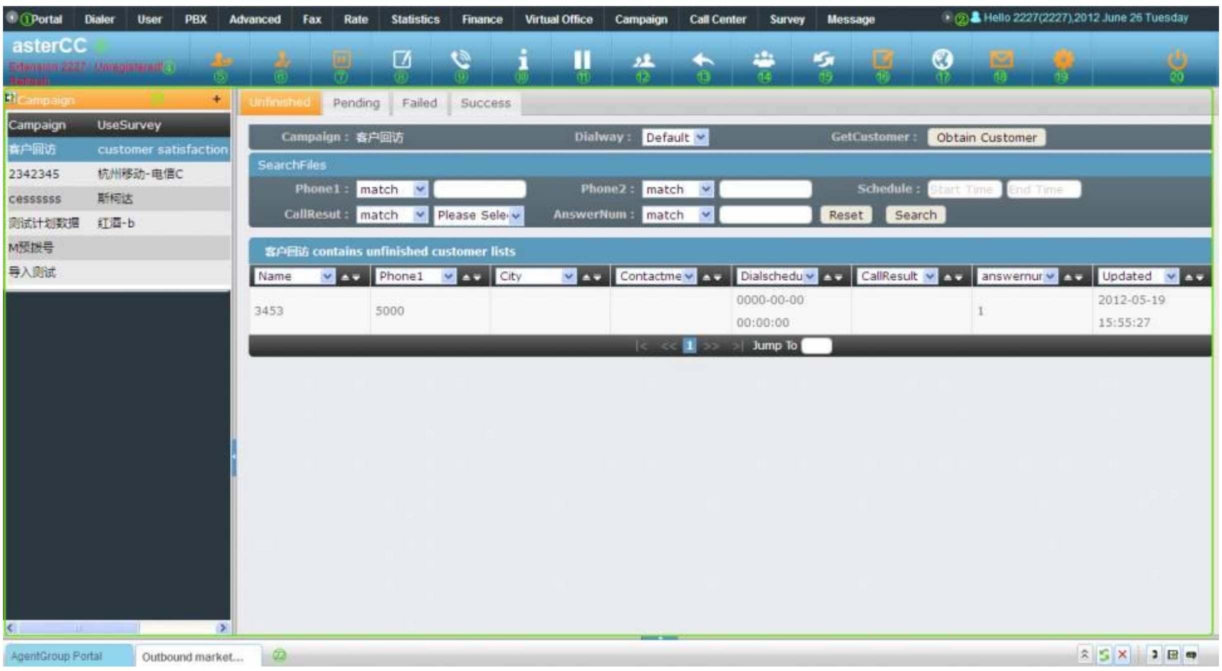
23 Agent Platform

23.1Agent Platform function keys

Login the agent platform

Please use Microsoft Internet Exporer(>=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

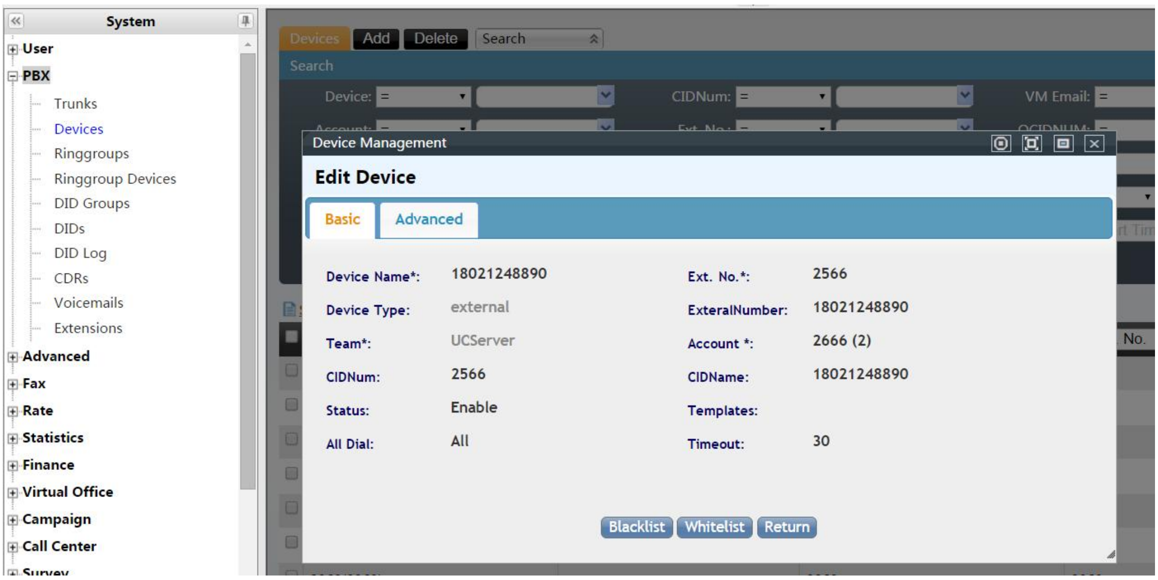
Agent Account, Agent Number and Device

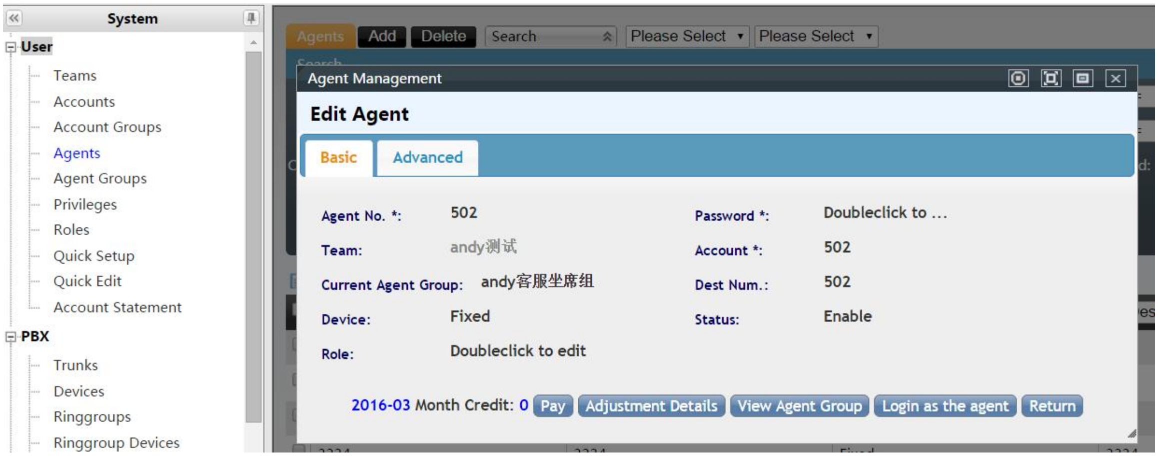
In VINA-PBX commercial, there are entries like team, user, user group, extension, agent, agent group, agent group administrator, agent extension, agent number and agent password.

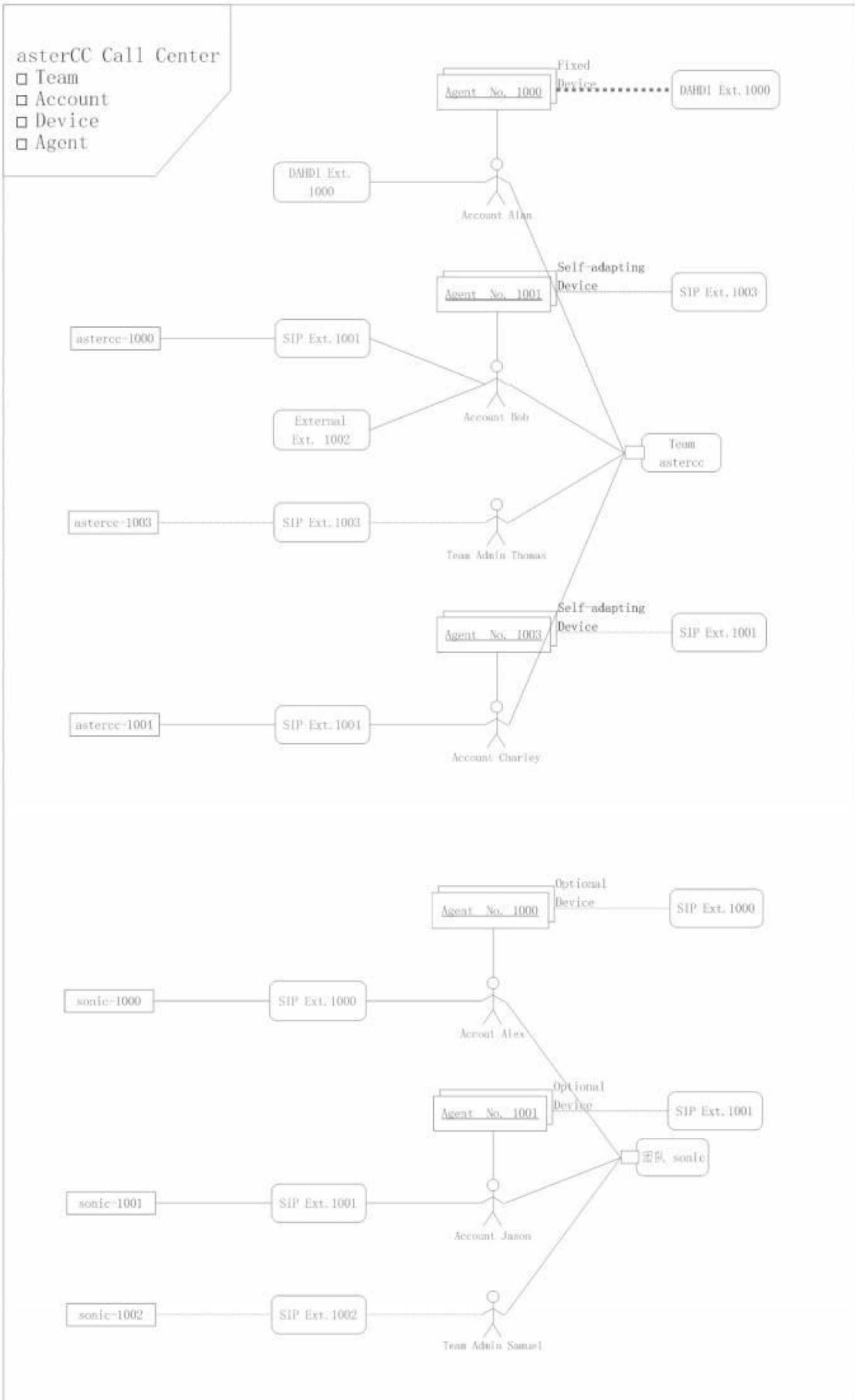
- Each team can be regarded as a individual system, which needs a unique identification for the team identity (e.g., the default team identity is astercc). Teams will not be able to influence each other. Each team has their only administrator, and can assign one trunk or a trunk group as their default 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 invocate functions related to that agent through API.




System
User
Teams
Accounts
Account Groups
Agents
Agent Groups
Privileges
Roles
Quick Setup
Quick Edit
Account Statement
PBX
Trunks
Devices
Ringgroups
Ringgroup Devices
Agents
Add
Delete
Search
Please Select
Please Select
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:

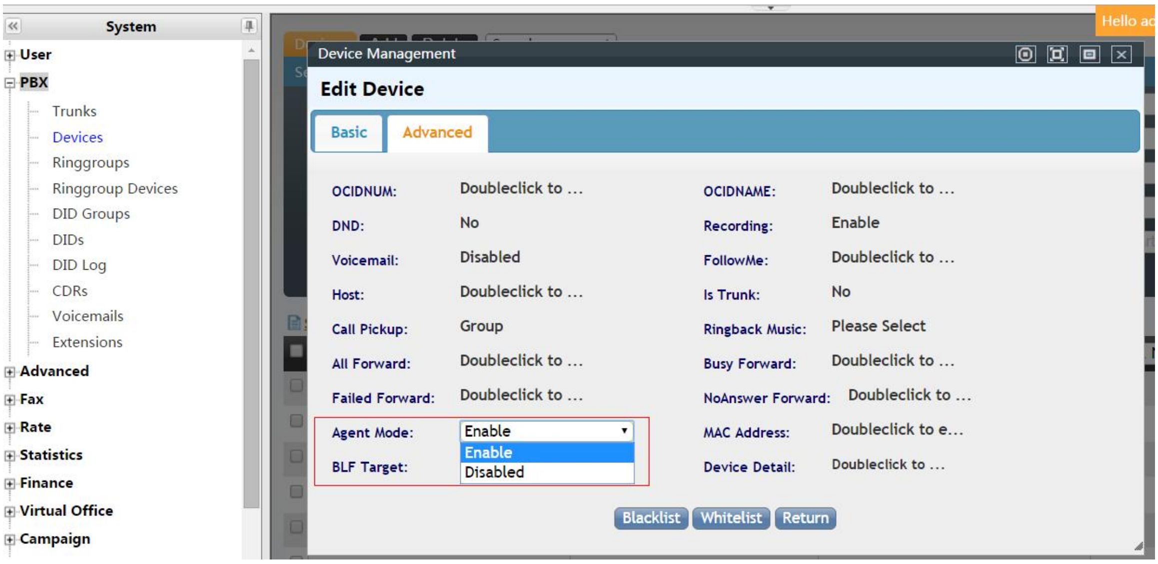
- campaign
- customer_service
- virtual_office

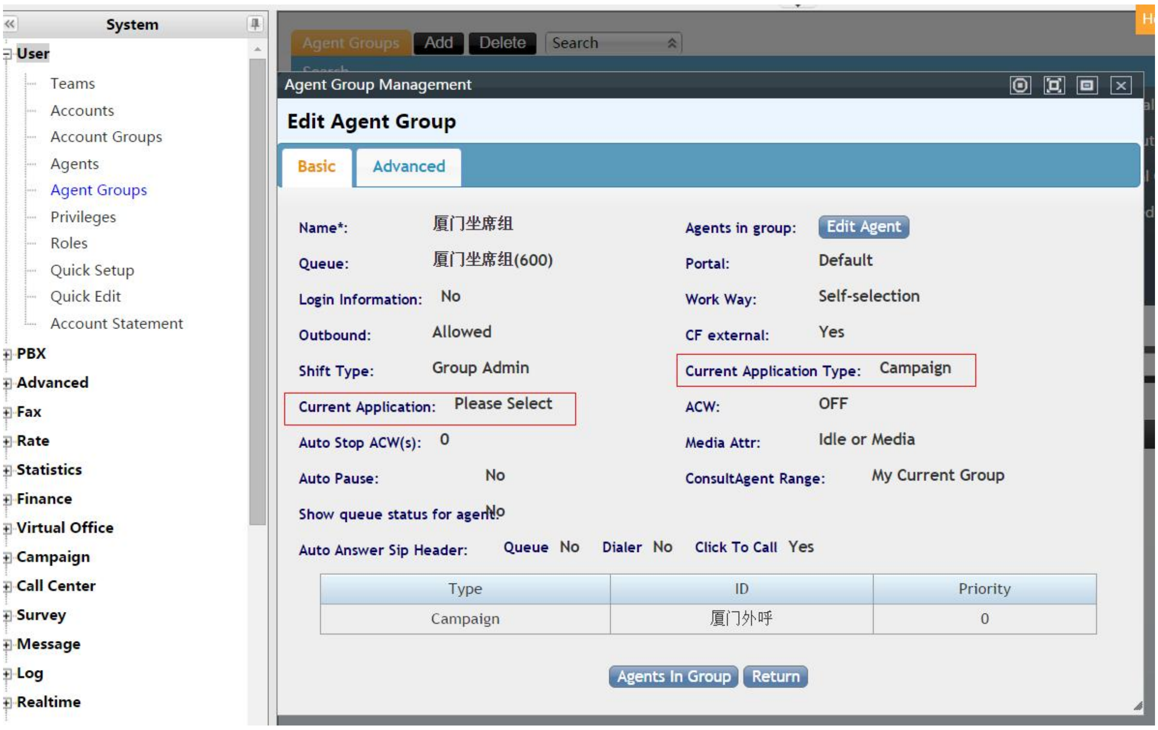
And at the same time, the system supports a third party system for integrate, and customers can easily have their own systems pops up.

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

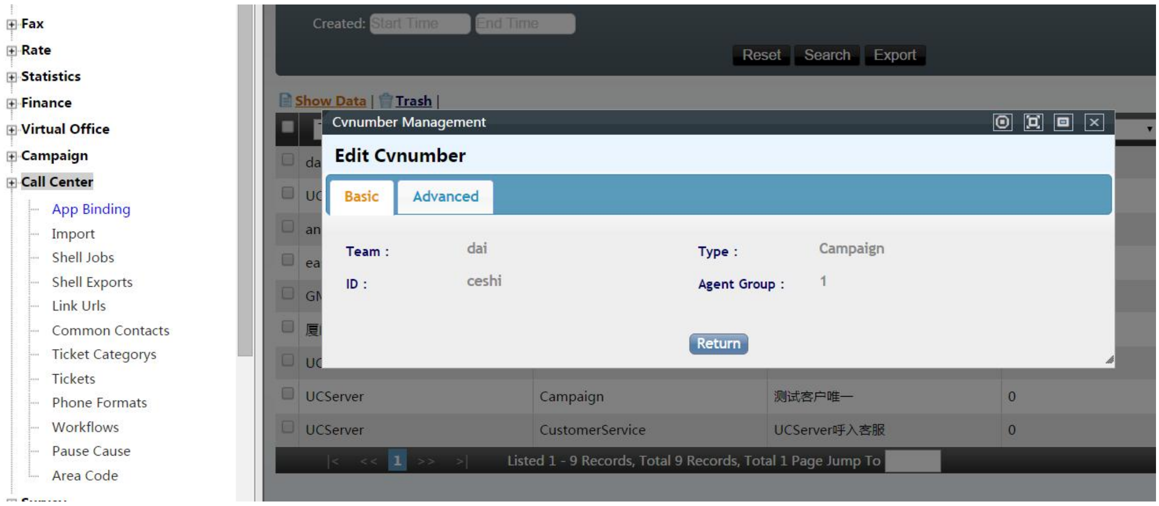




2)Direct Inbound Popup

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,

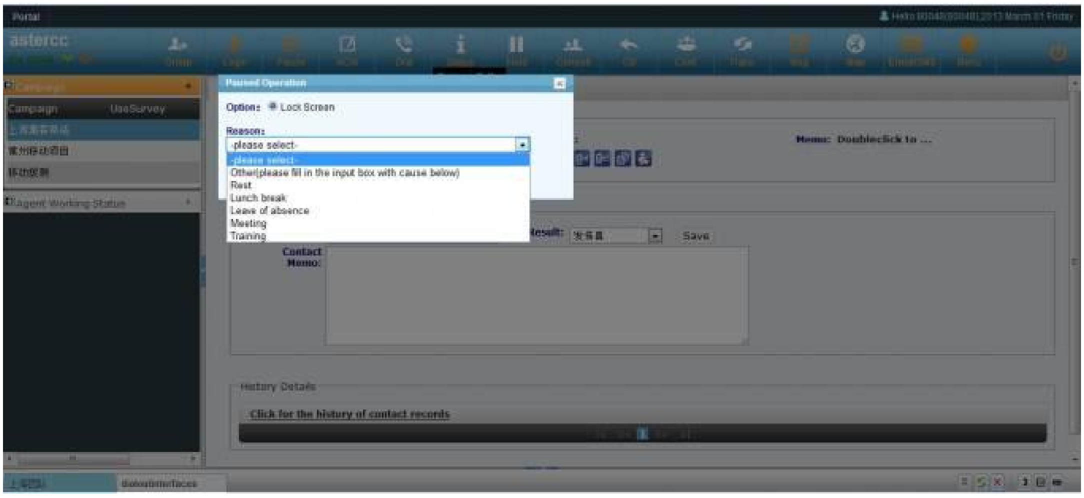
- Make sure the agents are in the signed in status
- Make sure corresponding applications can be found in [**Call Center**]→[**APP Binding**] when calls come in.

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.

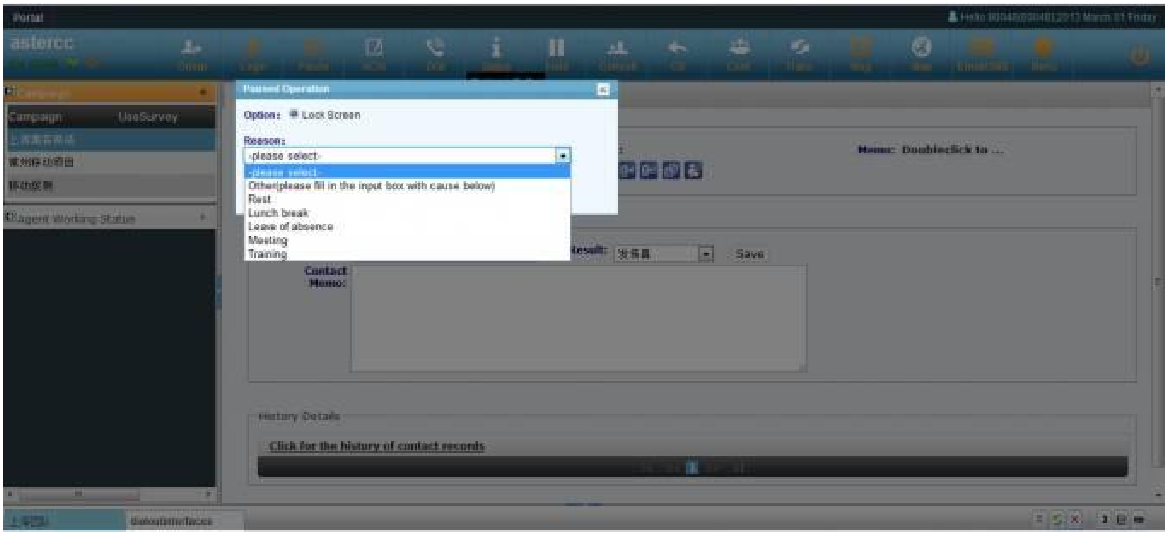
Only when the group that the agent signed in has a corresponding business system can the calls be placed through the page.



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.

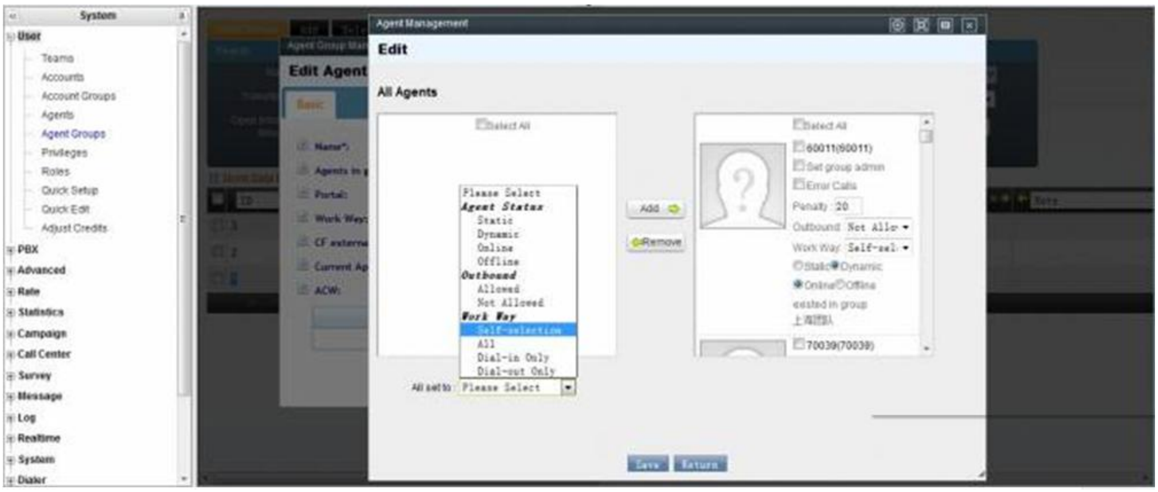
Only in the ACW and idle status can an agent pauses



Working Way

There are three working ways for agents,

- 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.

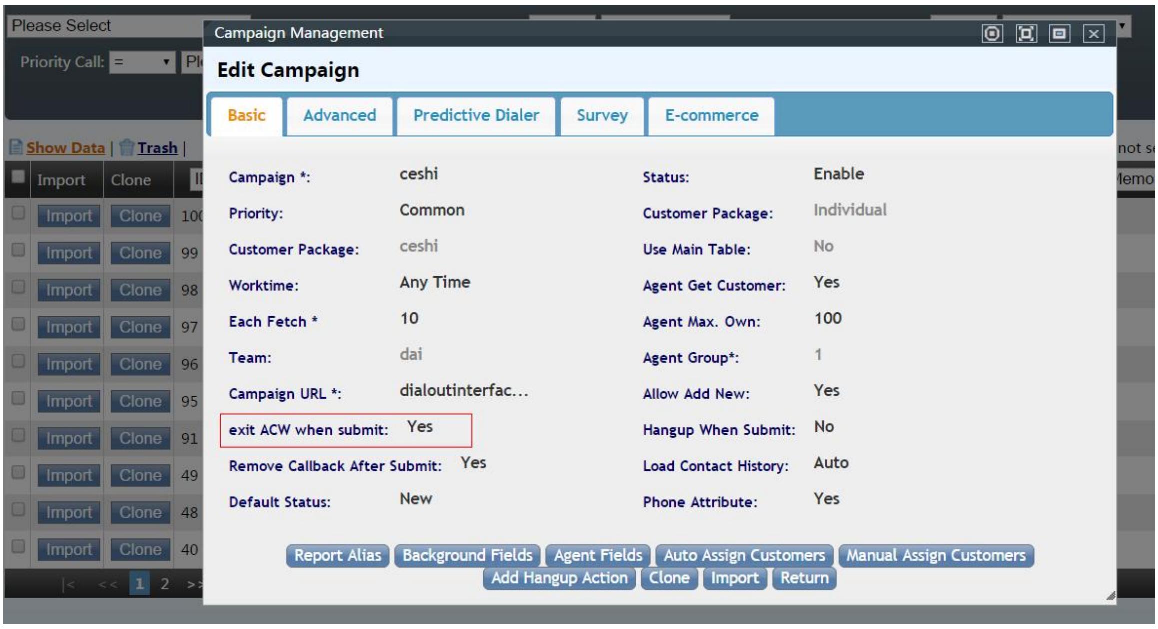


ACW

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.

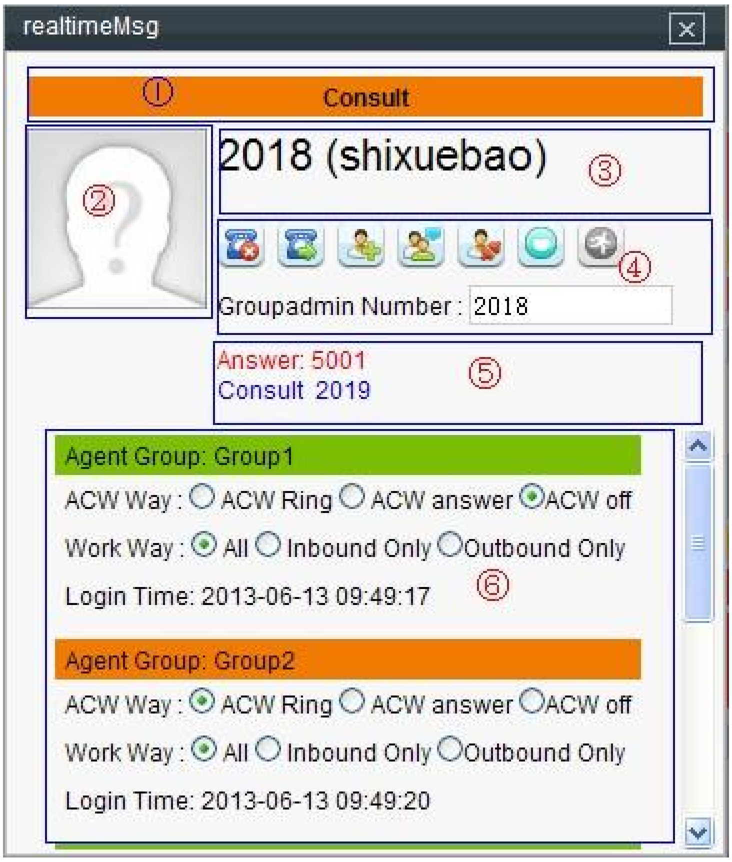
23.2 Supervisor Features

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”

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



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.

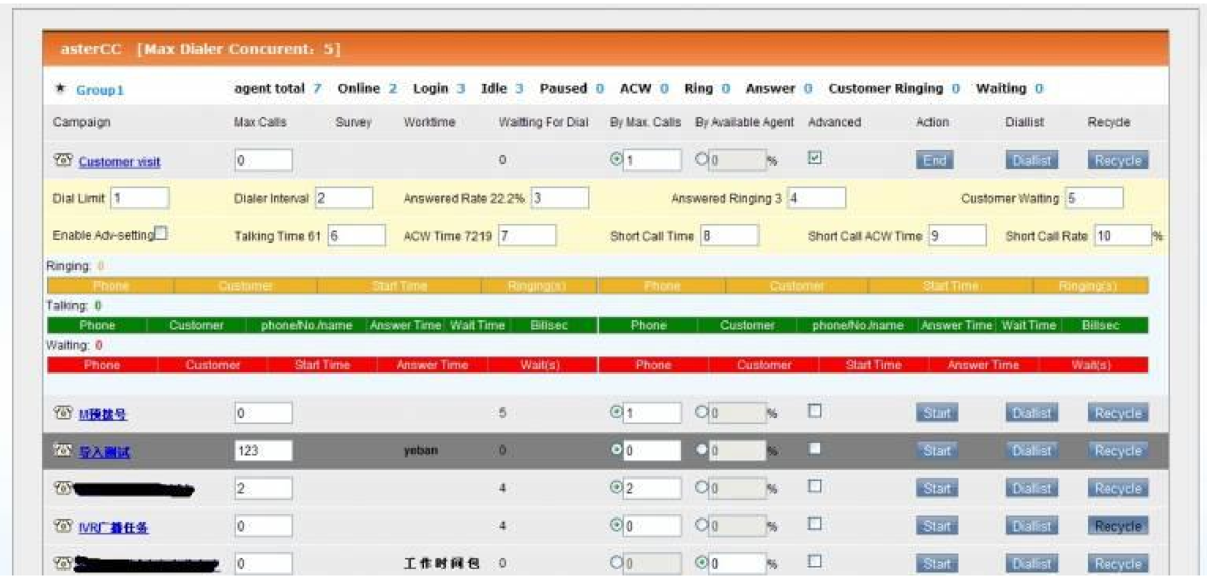
Frame ⑤If there's a call, it will appear caller id, if it's a consult call, it will appear the number of consult party

FrameDisplay 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

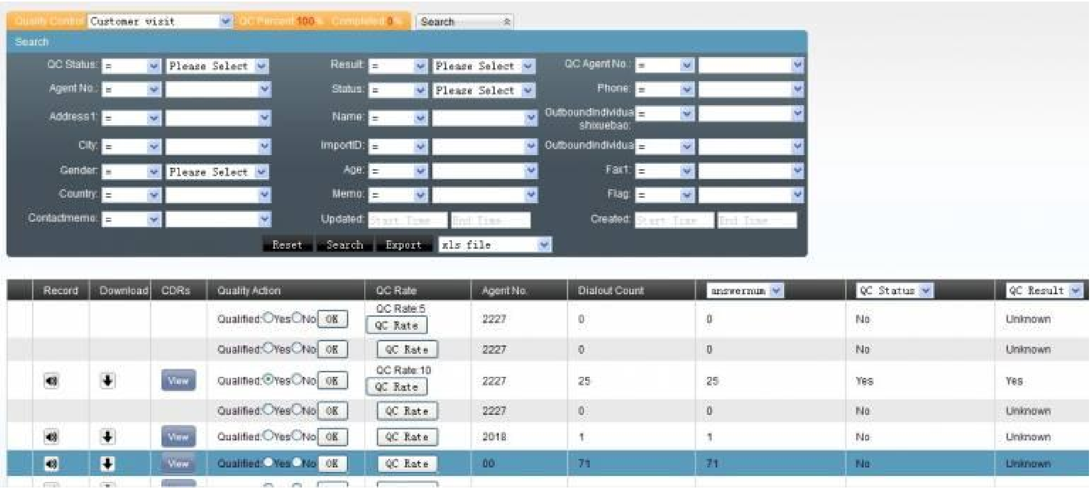
Report Statistics

When the group admin role gets the privalidge 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

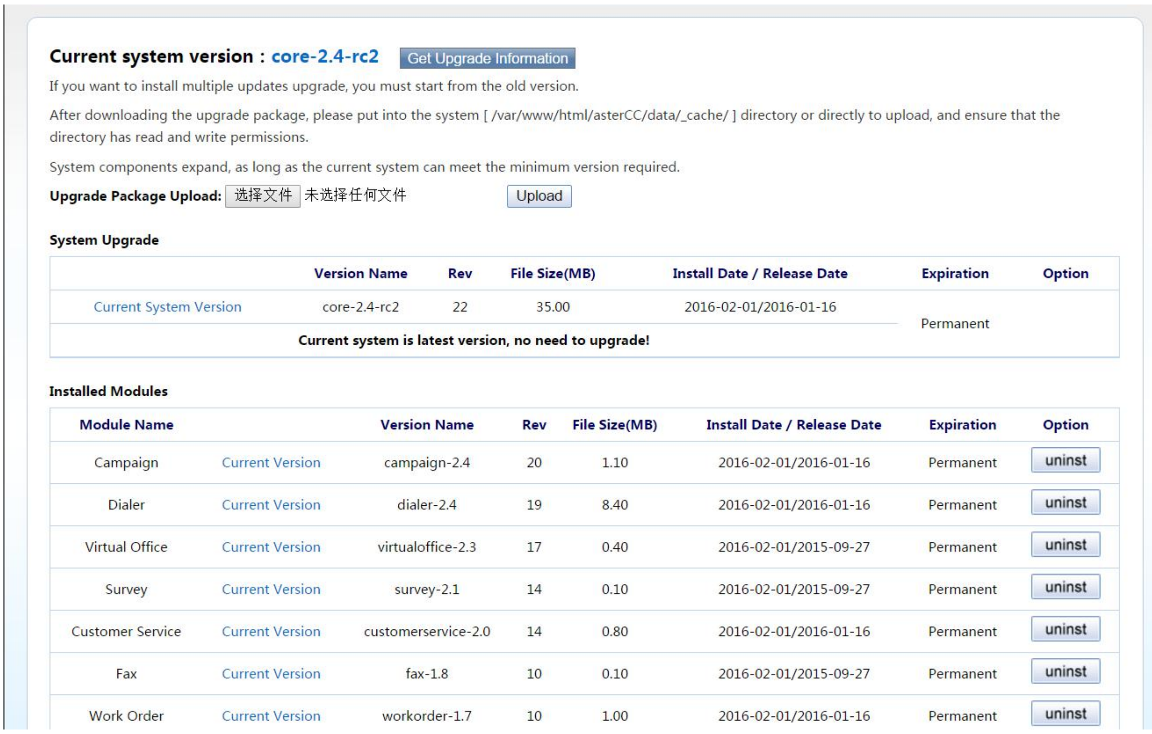


Check qcpages for more information

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



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)

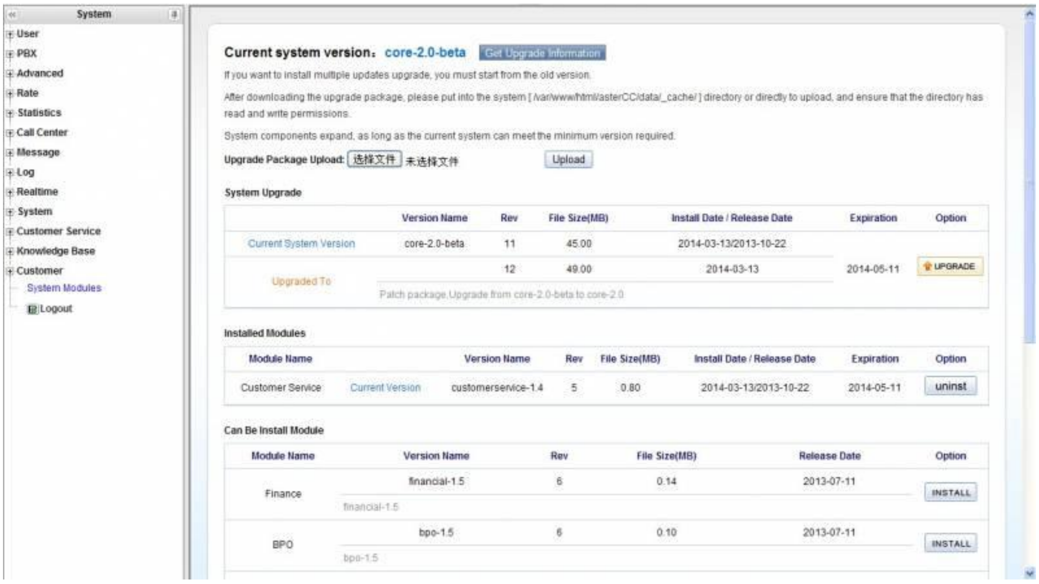
Can Be Install Module: show the modules which can be used to install in the system

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 upgrad file by manual(if there is no upgrade files in the system by auto)

The system upgrade file need to 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 behide,and click it will auto upgrade.

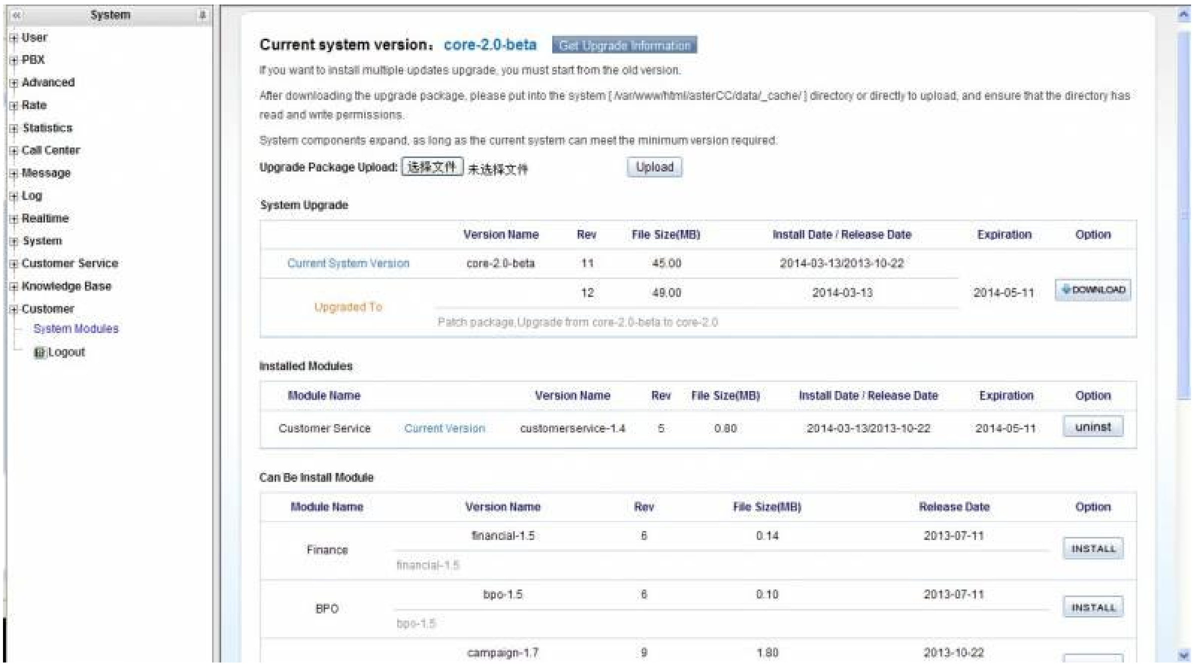


- System auto download the upgrade file

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

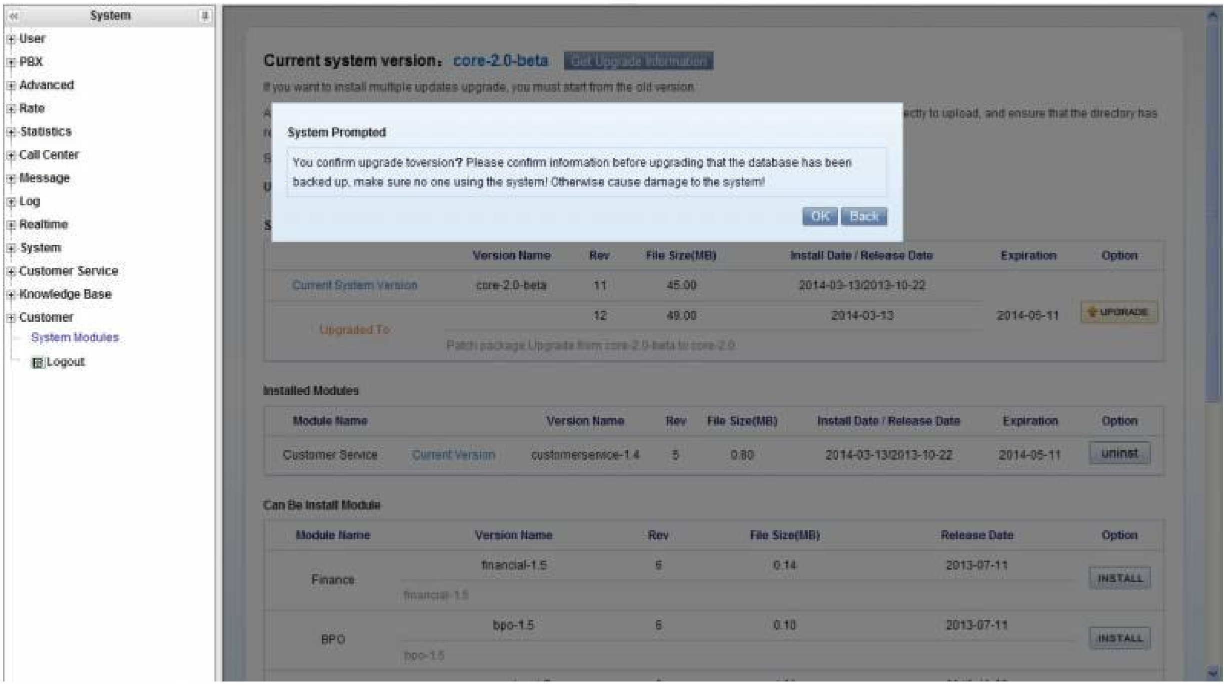
If you see the upgrade information,you can click the `download` button to download the upgrade package.Then you will see the picture,like this:



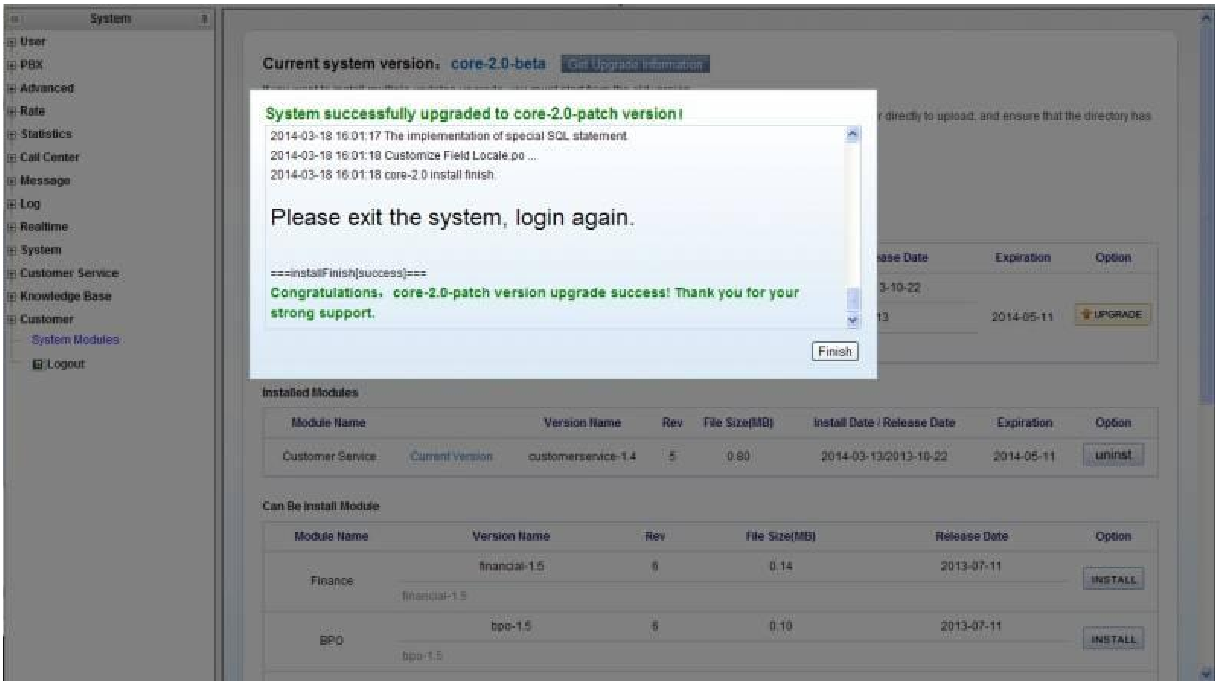
Choose one to download,After finishing it,you can upload the upgrade package to /var/www/html/asterCC/data/_cache/,there are two pattern to upload

- Upload by FTP tools
- Upload by click the upload button on the page

When click the upgrade button,it will show:

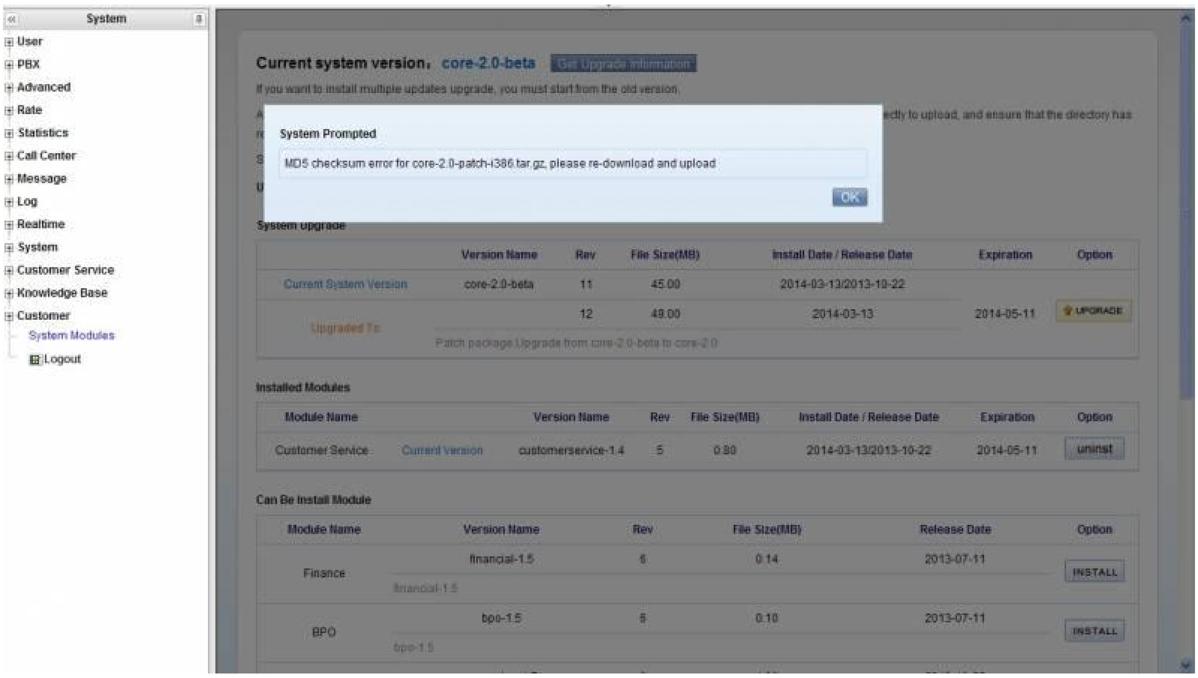


If you want to continue,click ok,then it will upgrade

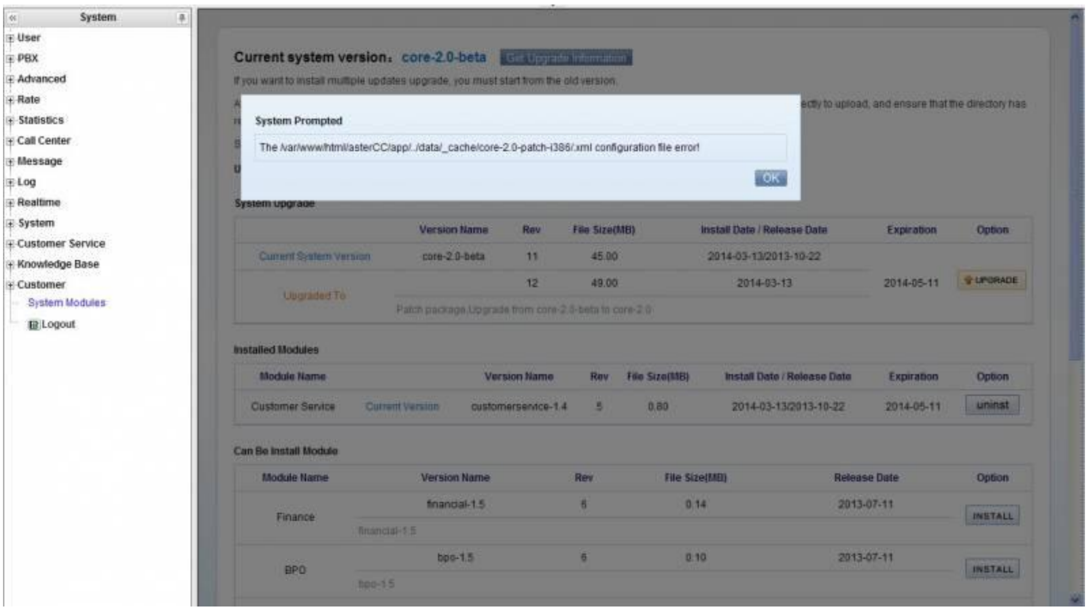


In the upgrade process,there will disappear several problems:

- Upgrade package MD5 check error,like this:

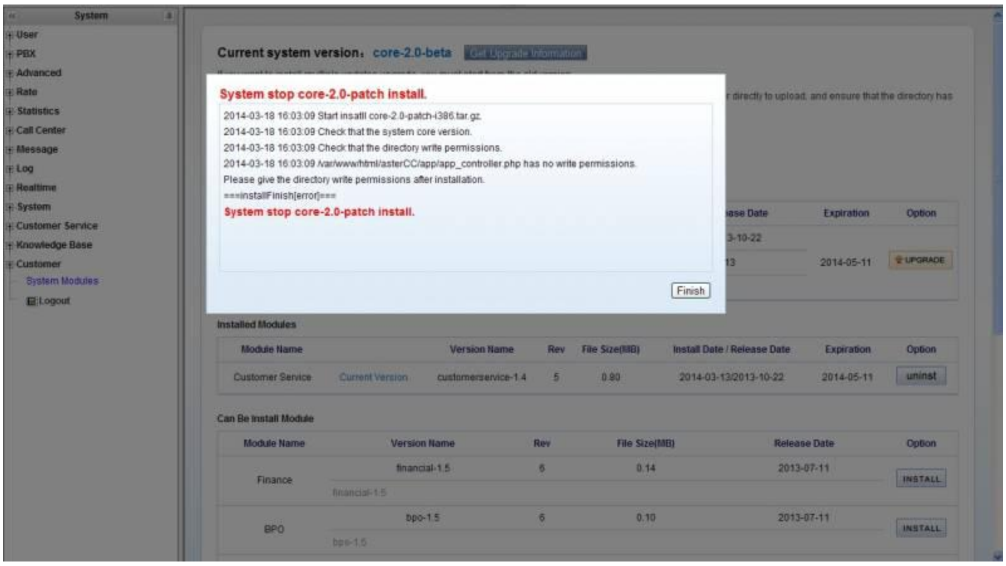


- Configure file error,like below:



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 permision, so you can login the systen by SSH,then execute below code:

chmod 777 /var/www/html/asterCC/app/app_controller.php

let the app_controller.php file's permision to 777

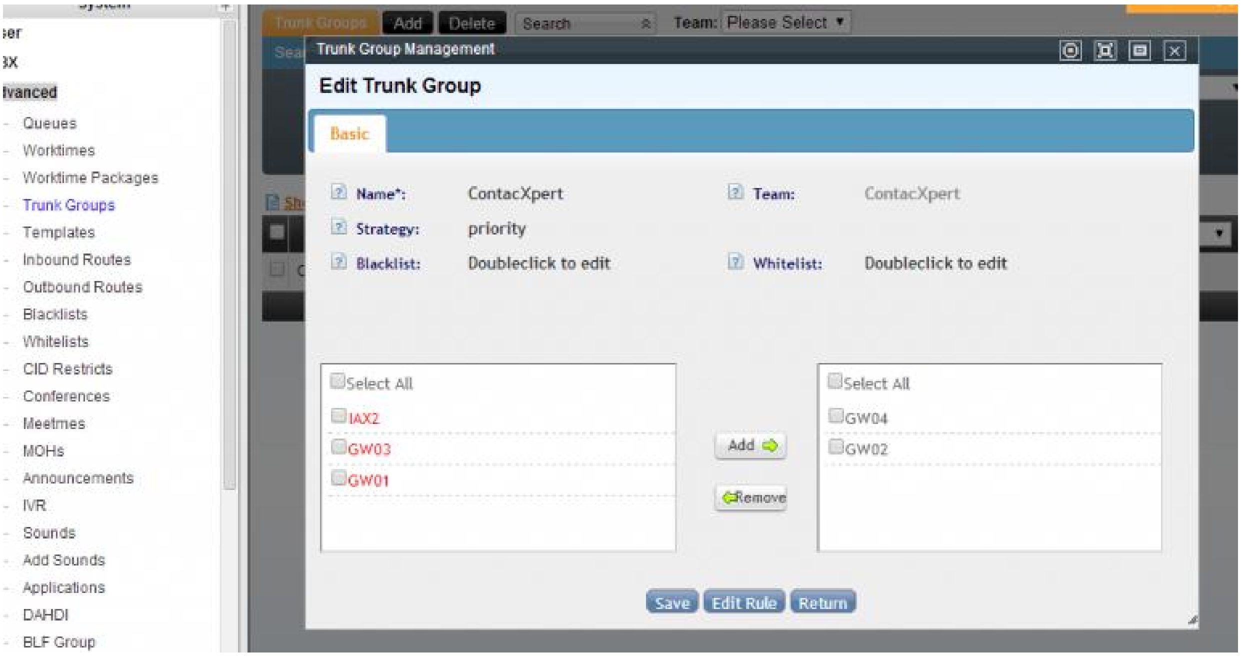
- 413 Request Entity Too Large

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

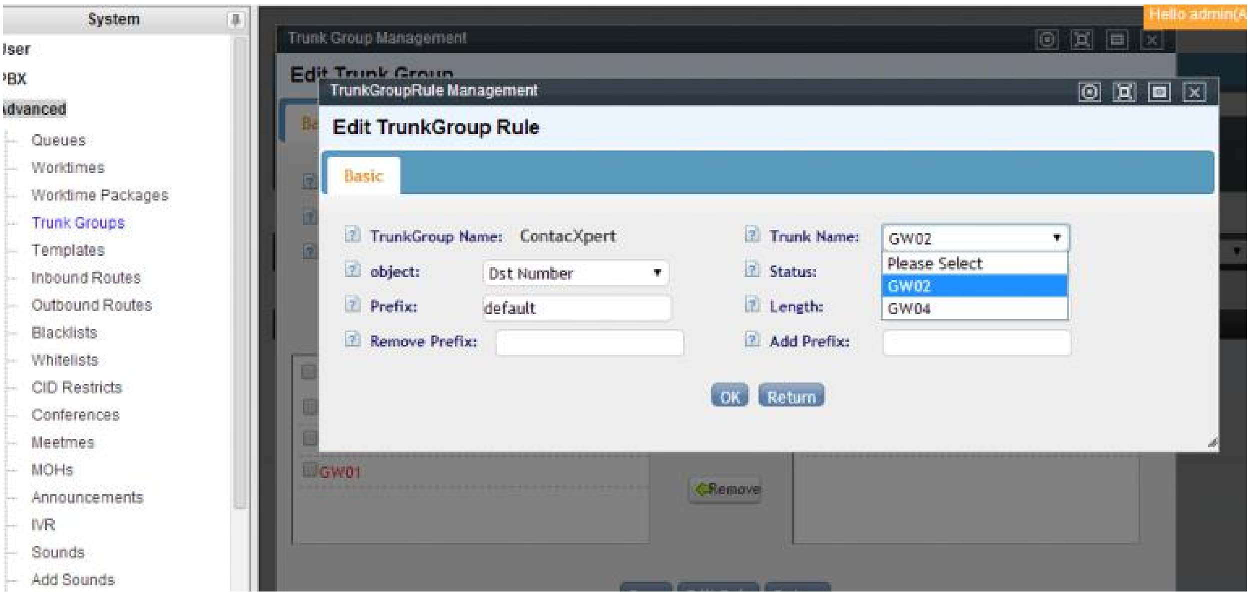
- put all trunks you want to use into one group
- read trunkgroup for more information for trunk group



Config trunk rules

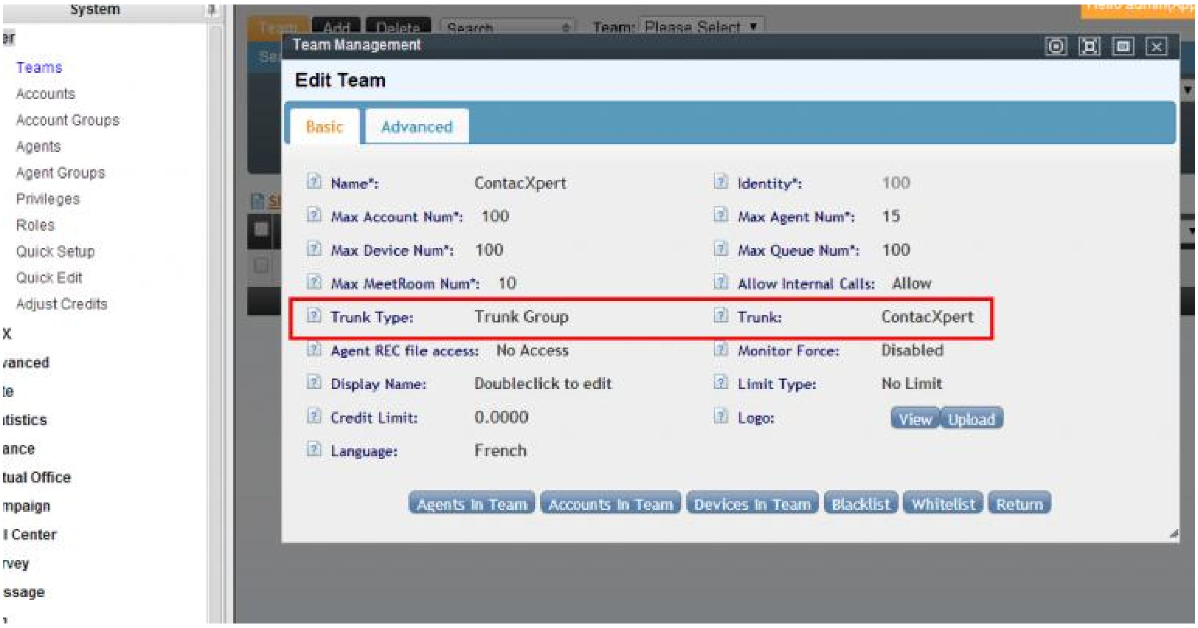
- You can use prefix, length and then select a trunk, in this case, if the dialed number match the rule, it will choose the trunk

You can also change caller id for inbound calls from this trunk group



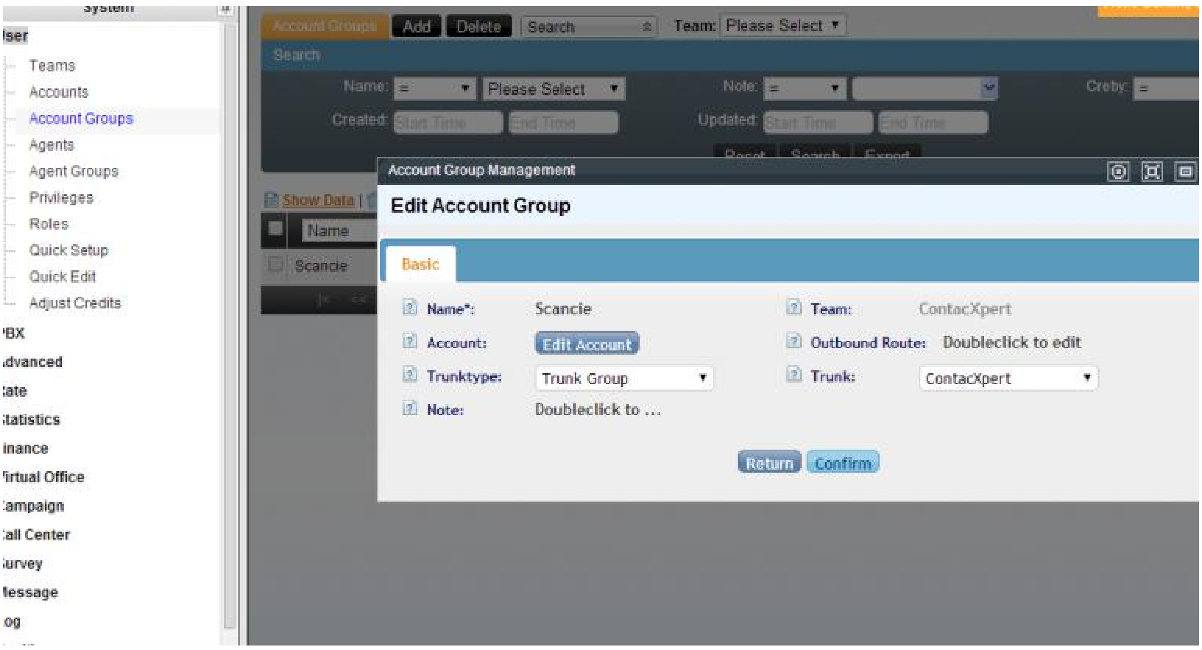
Apply the rule for whole team

- If you want to apply the outbound rules for whole team, just go to team, select this trunk group

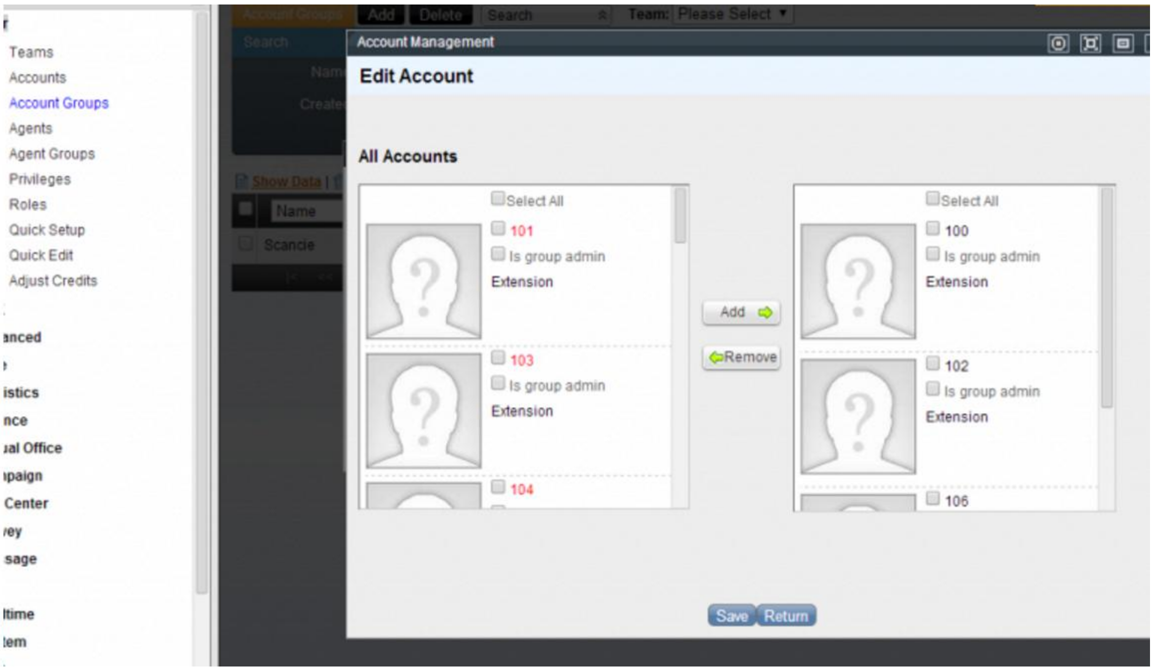


Apply the rule for specific users

- If you only want to 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.



Agent will use rules which is applied to his account



25.2The 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.

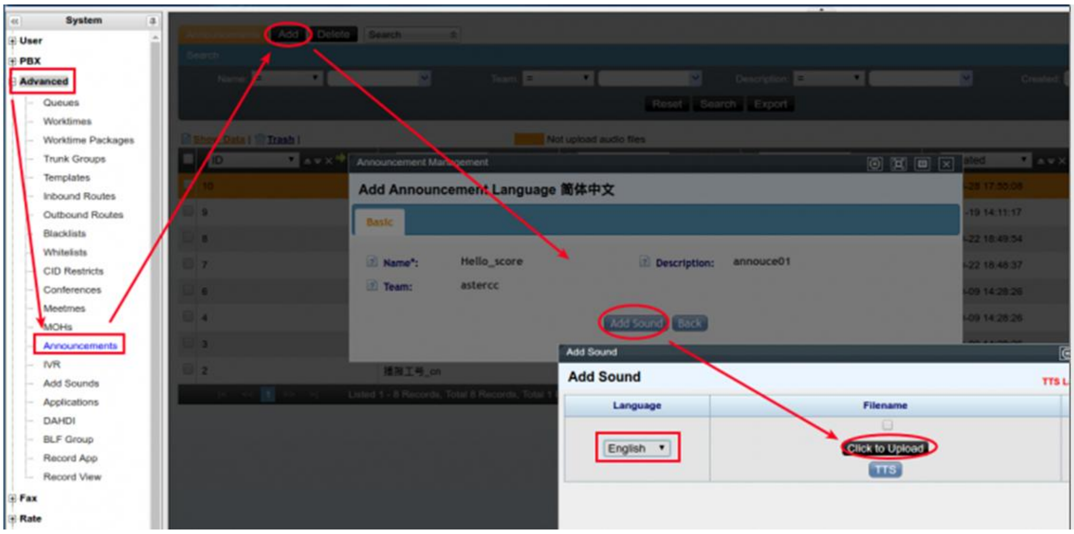
25.3How to Implement After Call Survey for Agent

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

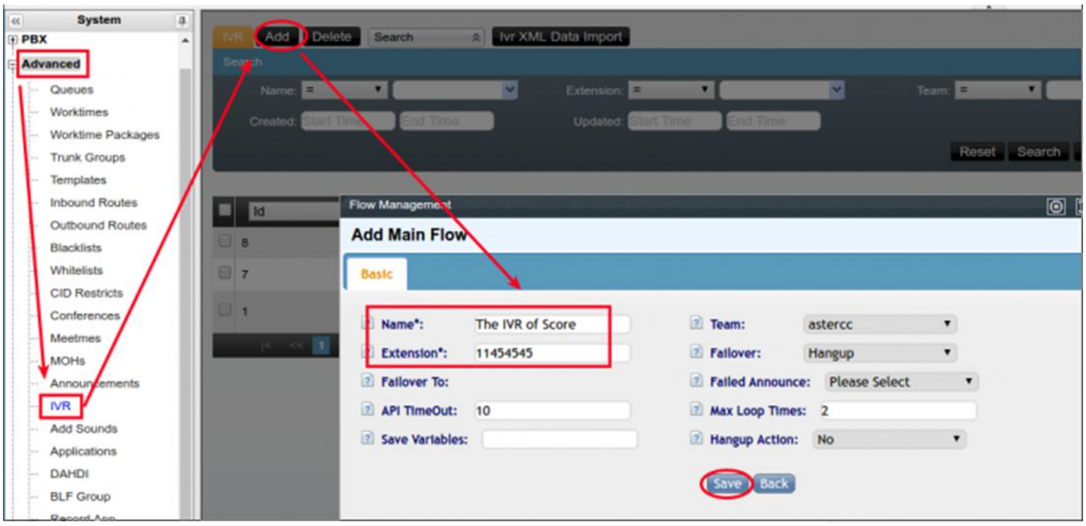
We need upload the announcements which will be used in IVR after hung up,for example:"Please make an evaluation for the service…." "Welcome to call us anytime…" and so on.

On the [Advanced]→[Announcements] page,you can upload announcement via click the [Add] button,as follows:



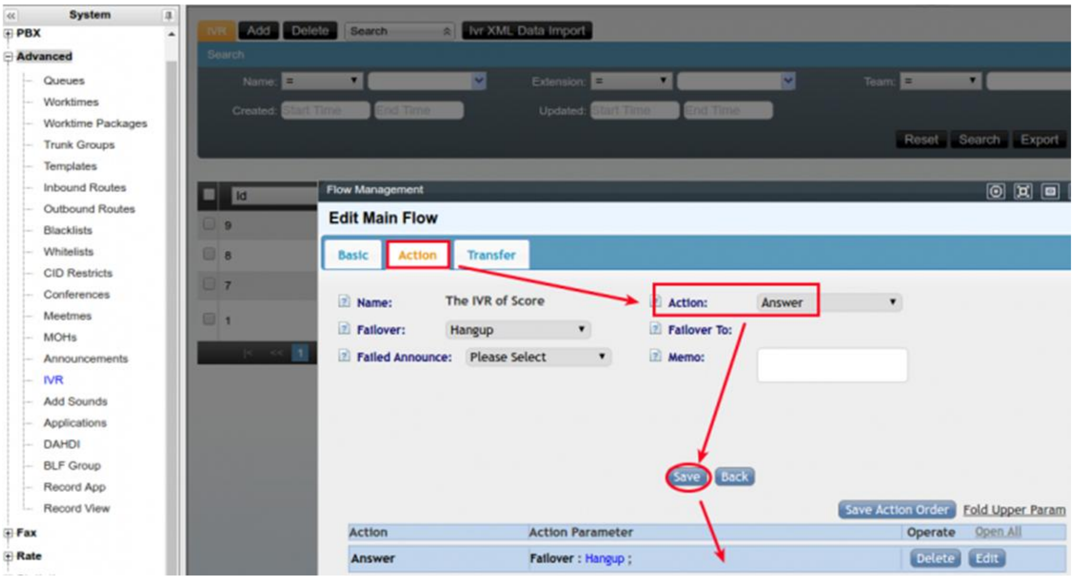
1)Add IVR of After Call Survey

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：



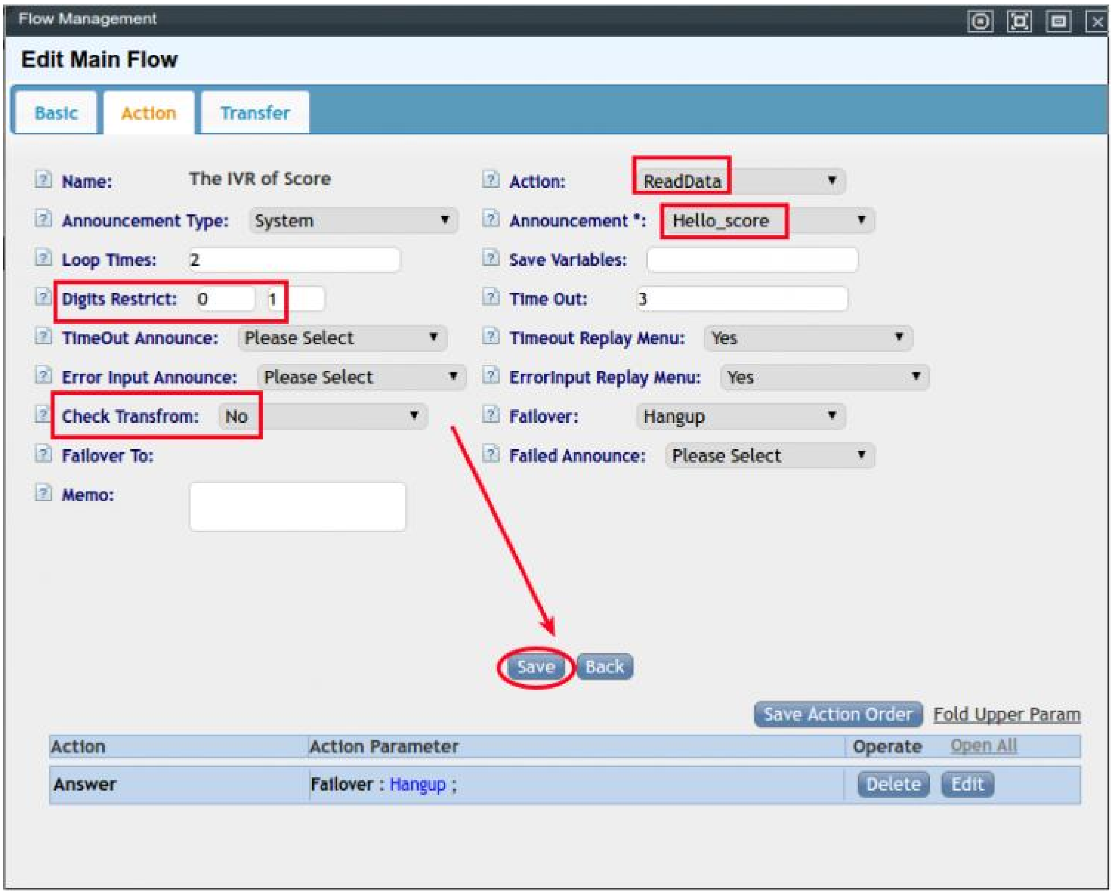
2)Add the Answer Action

Add the first action,this action is an **Answer** action,as follows:



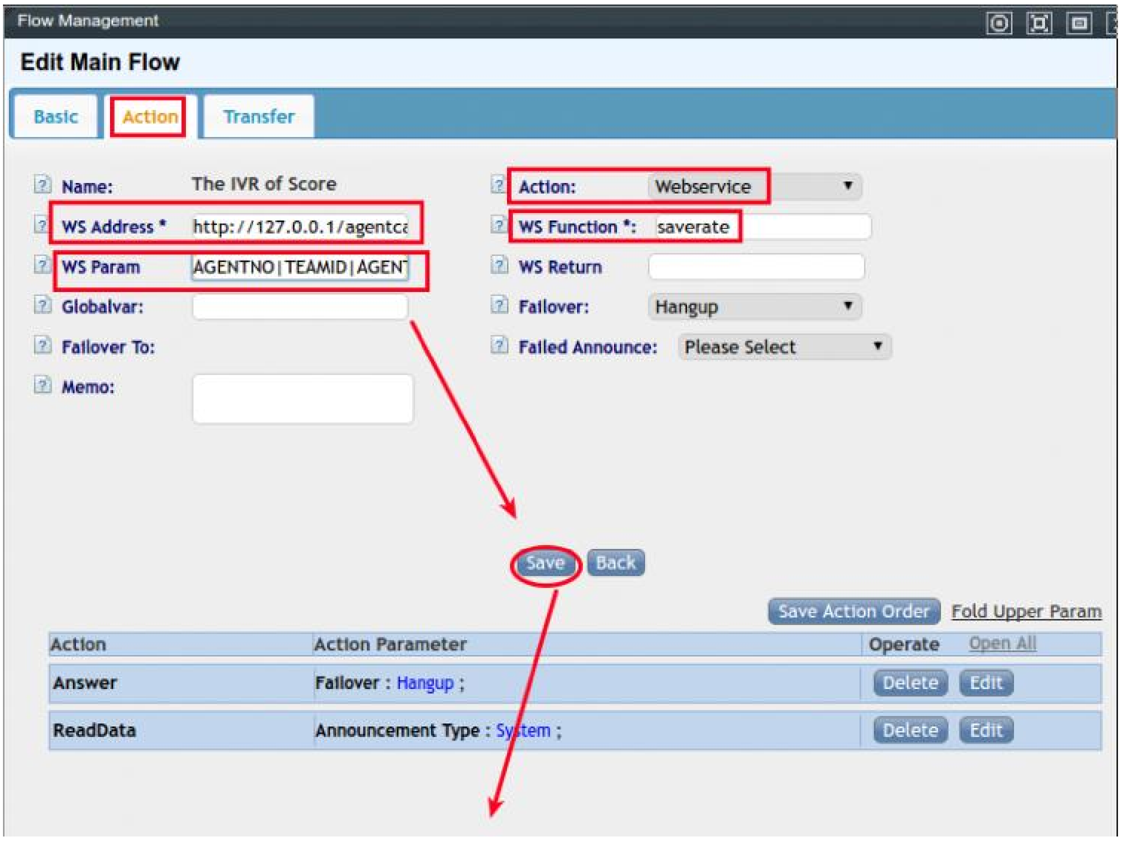
Add the ReadData Action

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:



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:

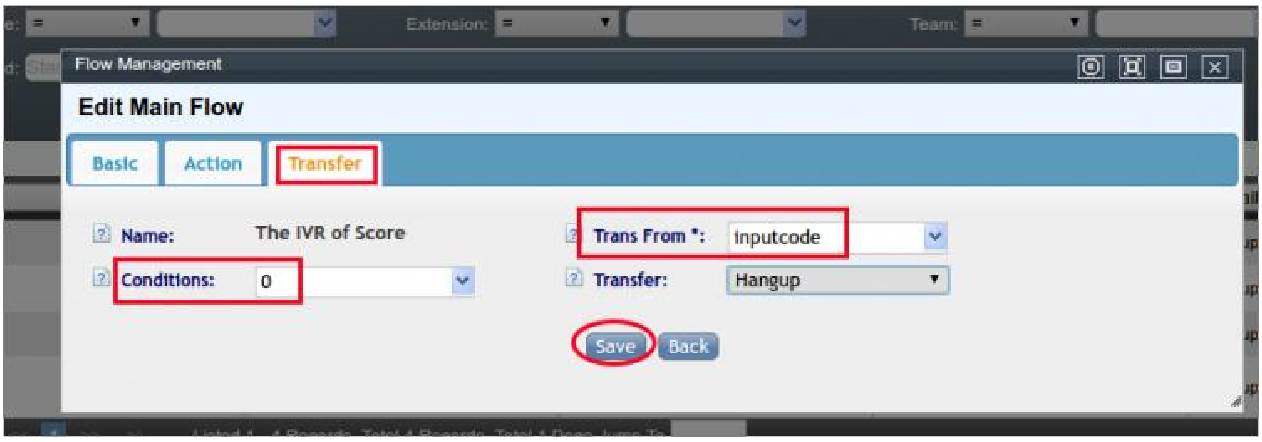


- **WS Address**: http://127.0.0.1/agentcallrate.php?wsdl
- **WS Function**: saverate
- **WS Param**: AGENTNO|TEAMID|AGENTGROUPID|sessionid|inputcode|callerid|MODELTYPE|MODELID

5)Add the Failed Transfer

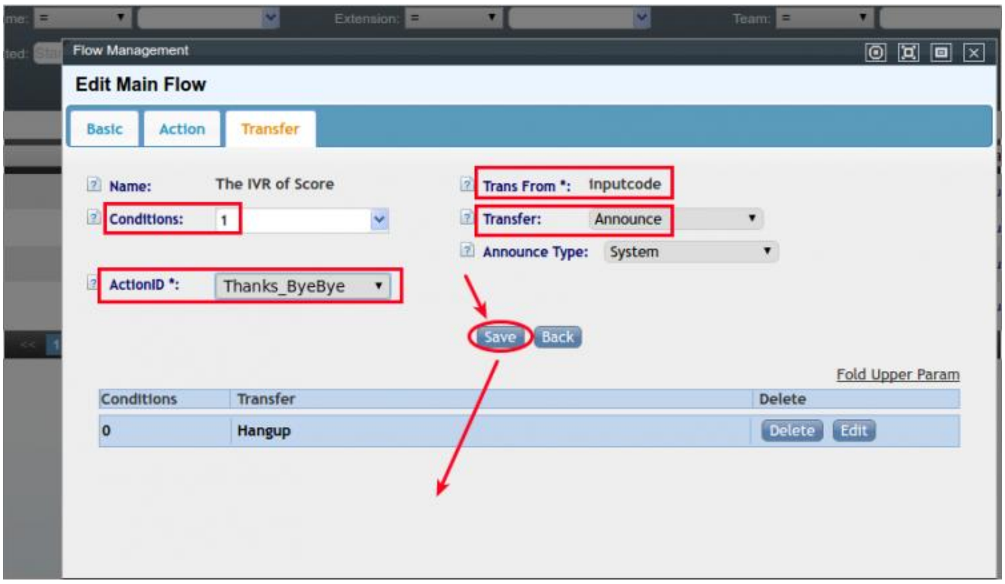
> The Conditions' value in transfer isn't the score for agent. it is the return parameter of webservice.

The first condition is 0:



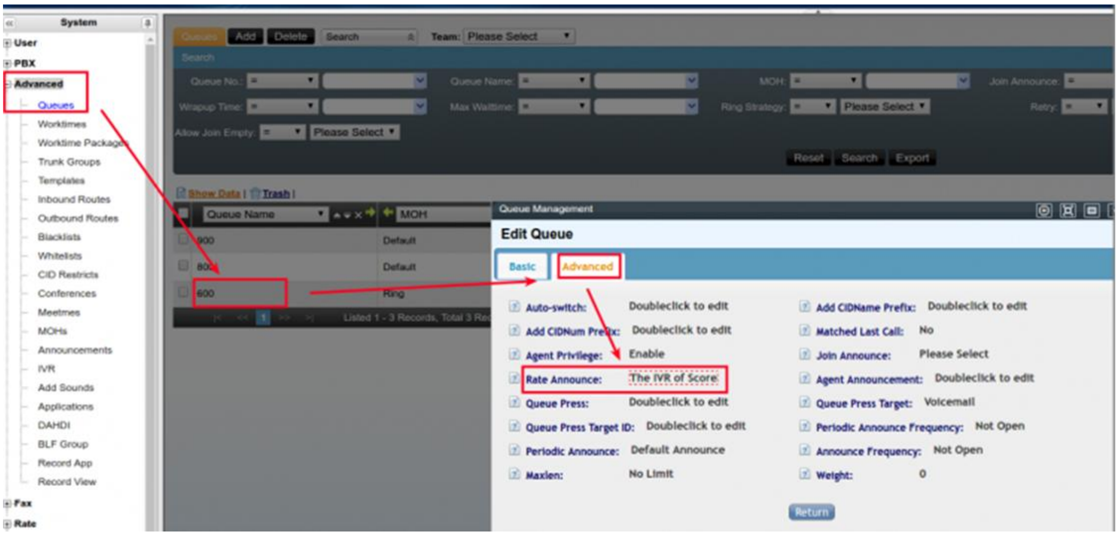
6)Add the Success Transfer

The second condition is 1:

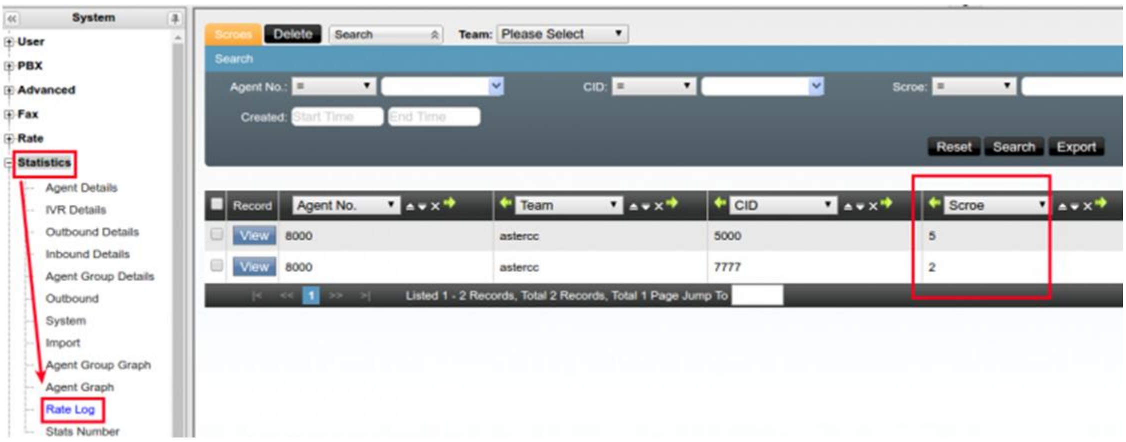


2.Assign the IVR to Queue

Double-click the [Advanced]→[Rate Announce] under [Advanced]→[Queues] directory,as follows:



You can enter the [Statistics]→[Rate Log] directory below to evaluate agent:



25.4What 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 chek 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.

25.5How 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

25.6How to Setup Recording

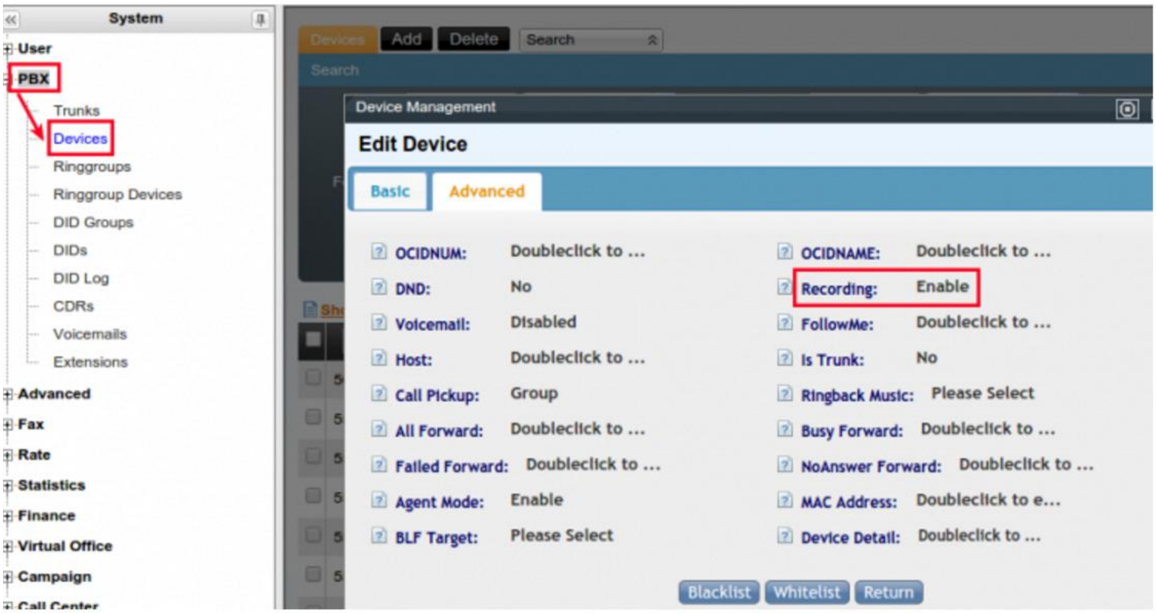
Recording can be sited in four places，there are Teams、Users、Agents and Devices

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

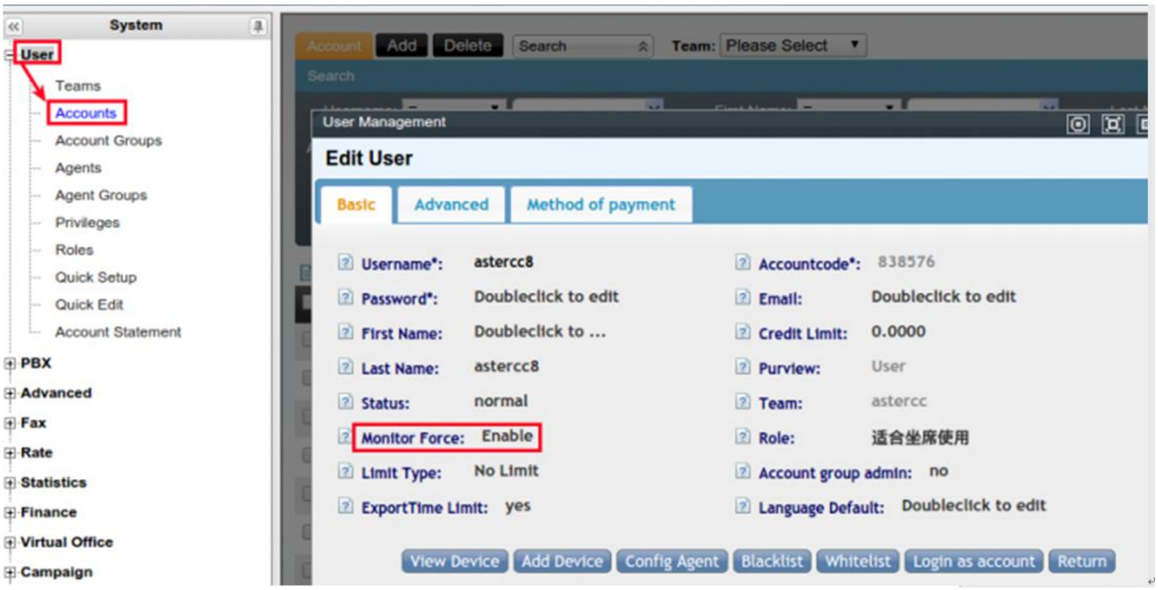
- Devices' Recording
- We can site the devices recording function “Enable” or “Disable



”

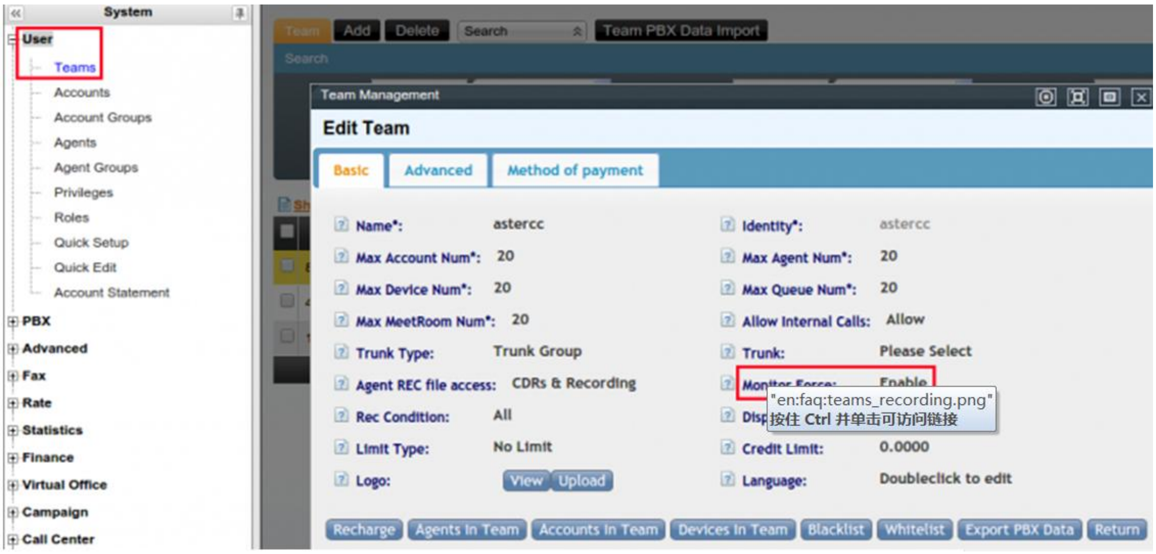
Users' calls recording

- 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"

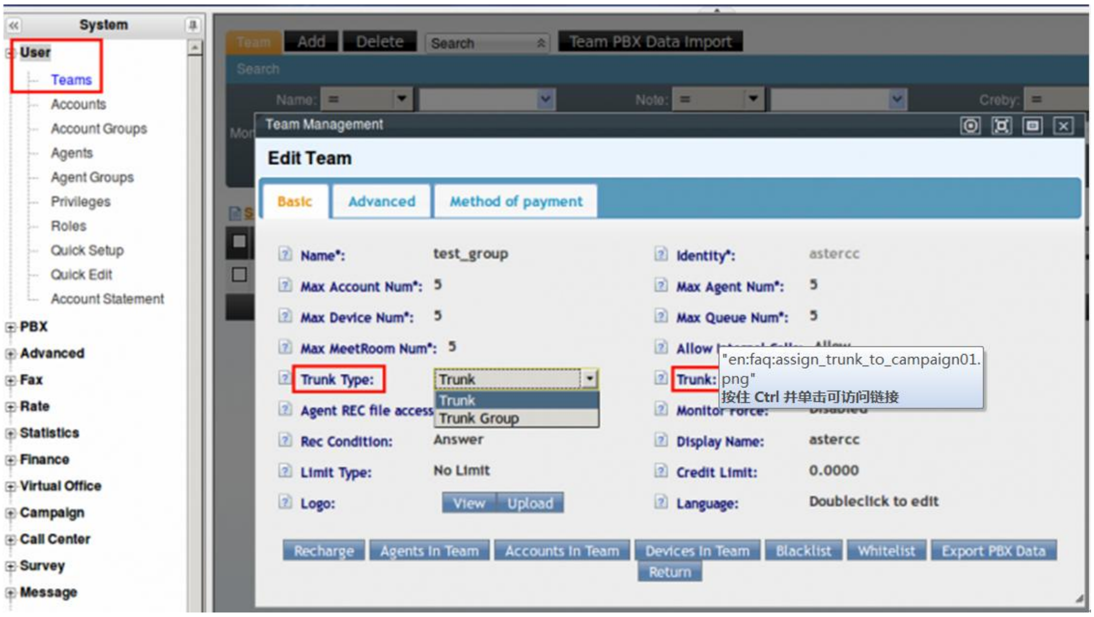


25.7How to Assign the Trunk to Campaign

Trunk is a route connecting the local telephone network and other telephone network(mainly the traditionl 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:



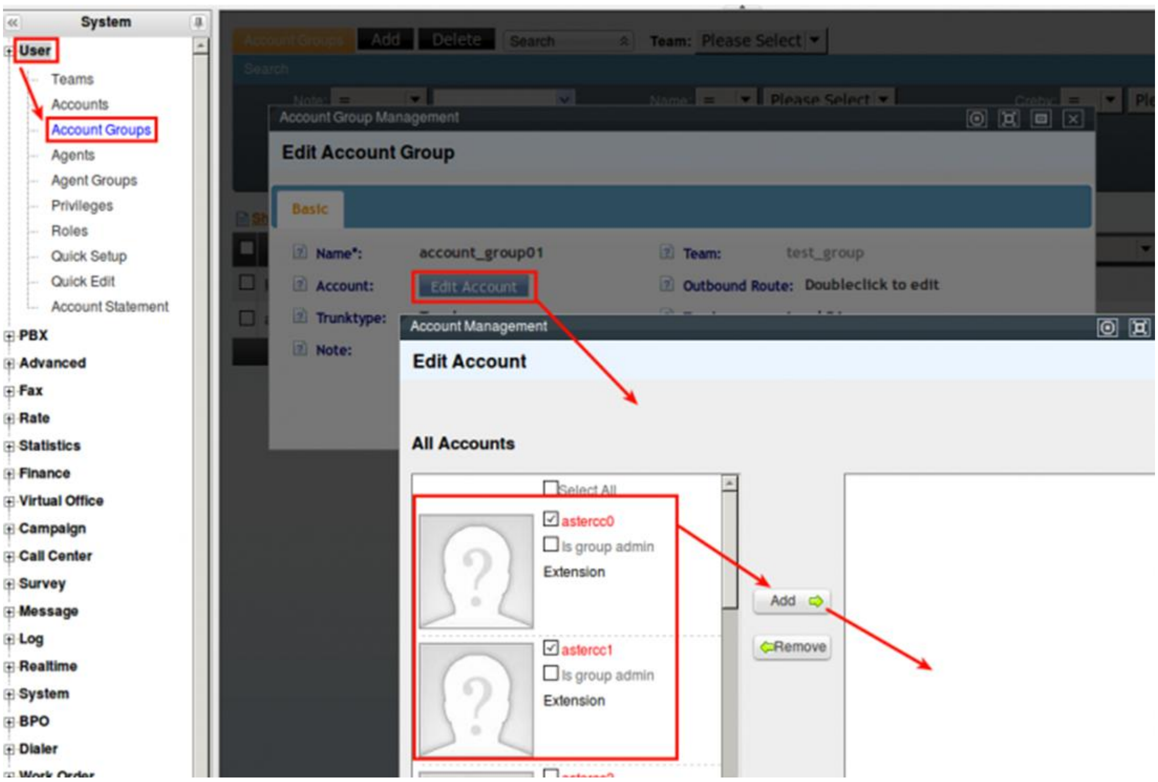
Set the Trunk in Account Groups

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？

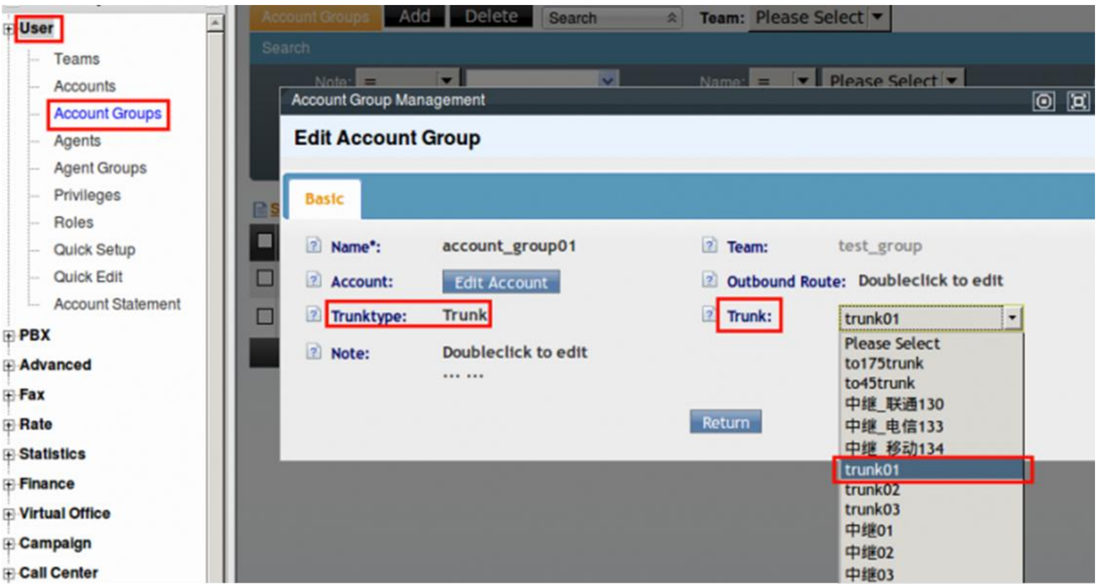
1)Add the Agents' Accounts to a Account Group

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:



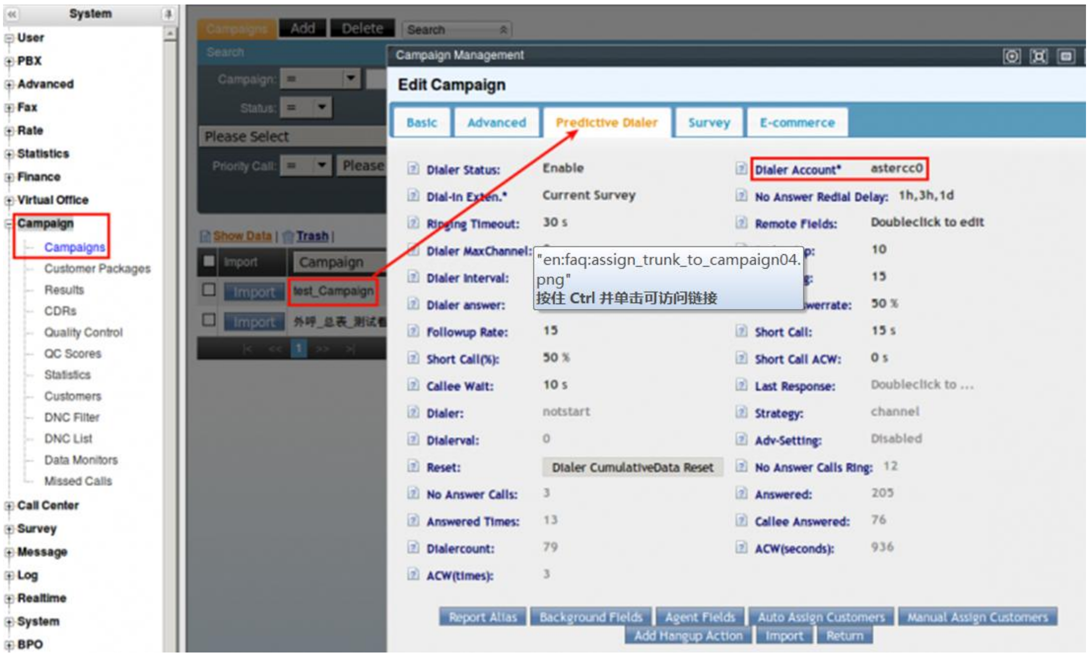
2)Assign the Trunk(or trunk group) to Account Group

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：



25.8How to edit the SMTP Server to send voicemail

How the system choose the SMTP Server to send the email?

1.Accordding 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 known the rule which how to choose the SMTP Server,then we can edit the satisfied SMTP Server to send the voicemail

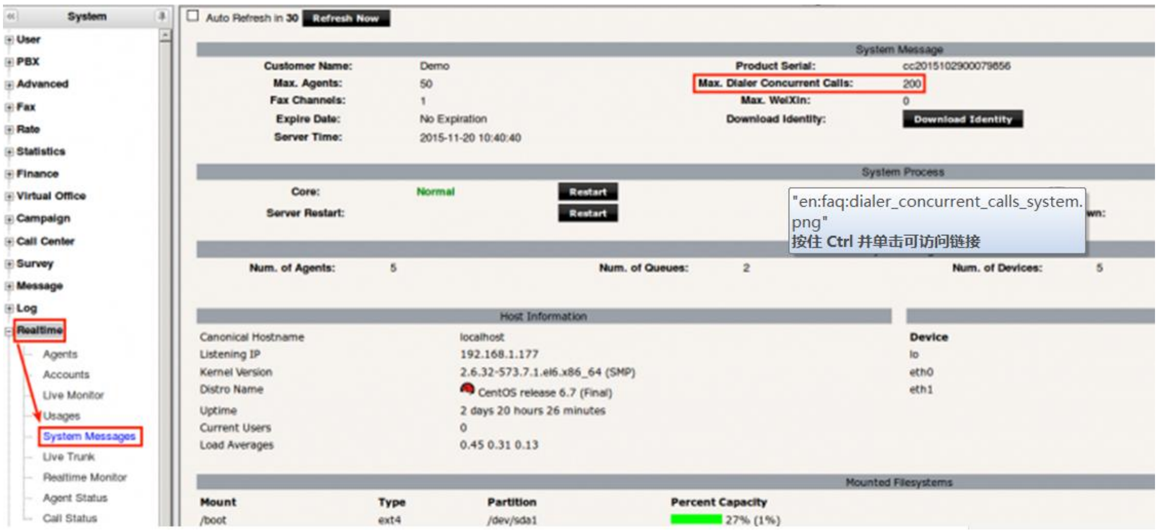
25.9How to Control Concurrent Calls in Predictive Dialer

The Trunk Provider

Above all，we should recognize the maximum volume of trunk that bought from provider。

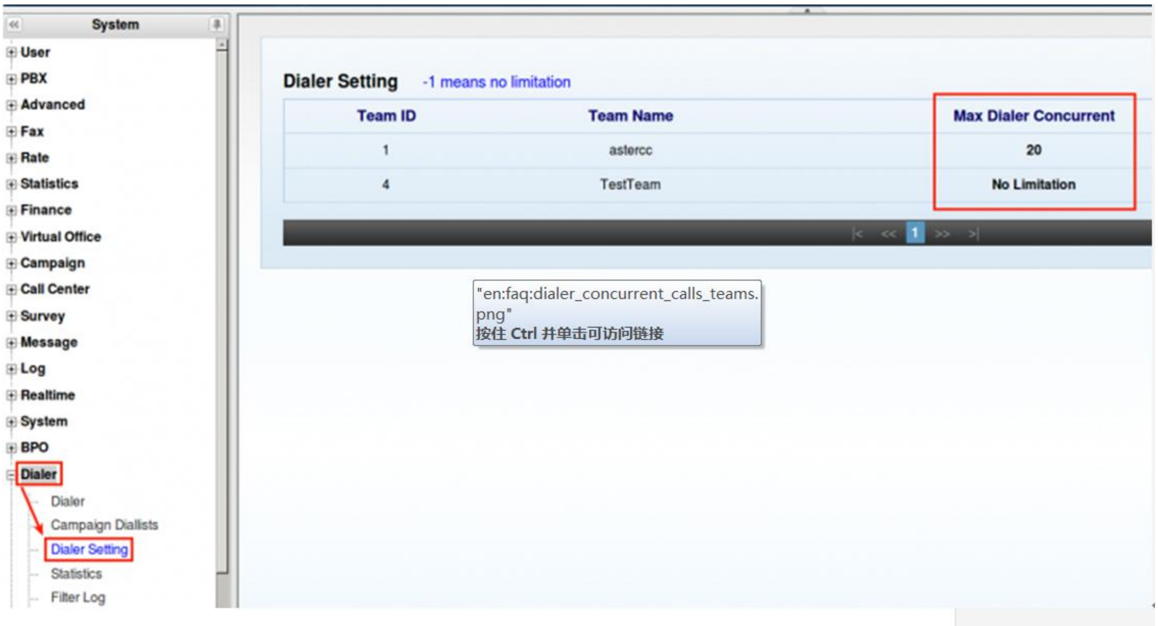
System

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

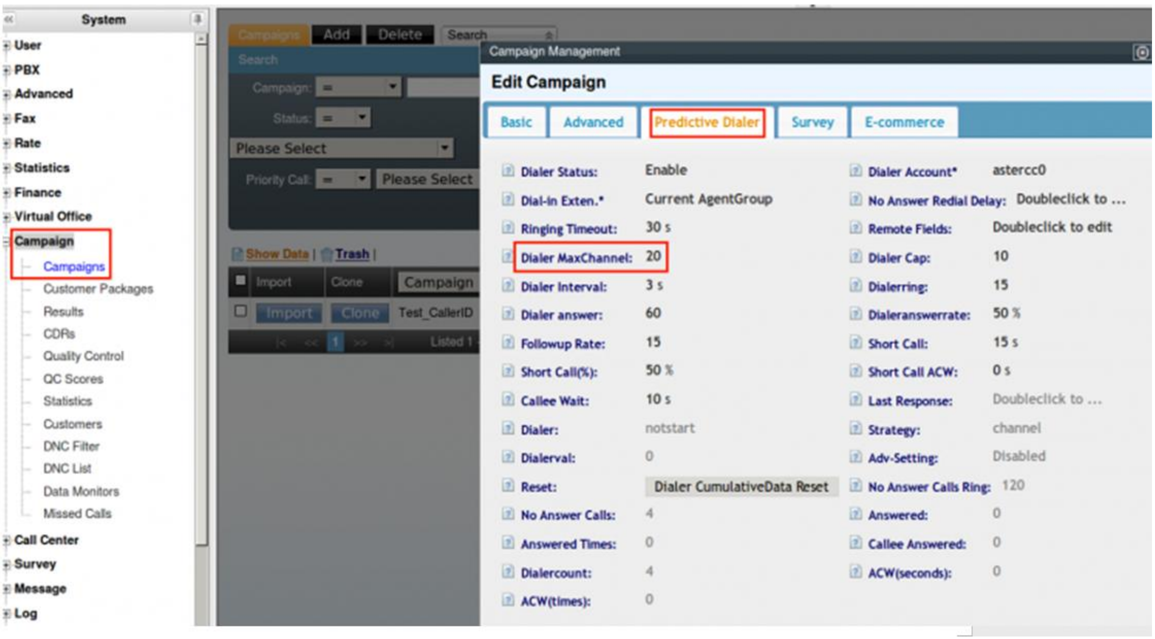
Open the management list on the left, click [Dialer]→[Dialer Setting], you can see the "Max Dialer Concurrent" of all teams, "-1" means "No Limitation", as follows:



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.

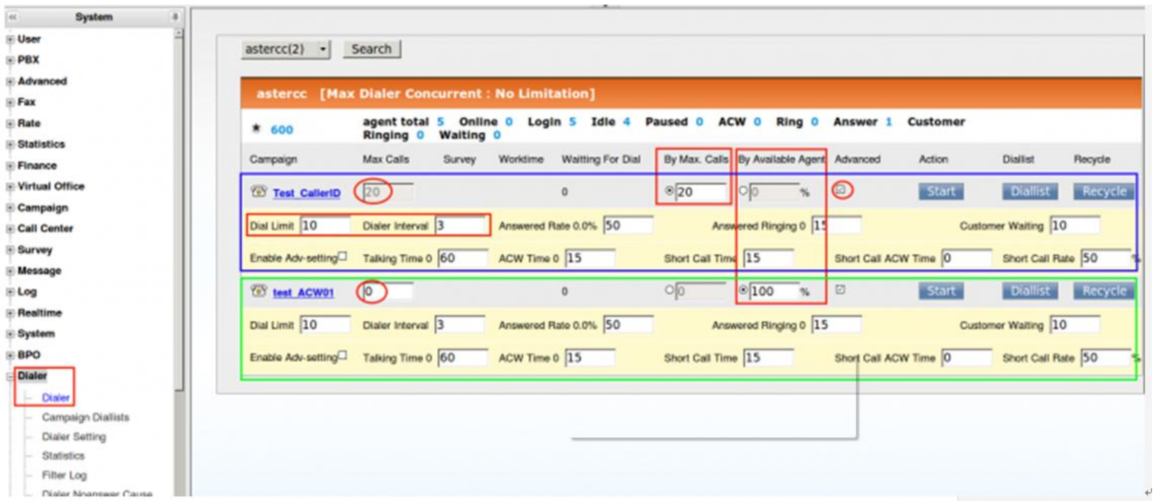
Campaigns

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.

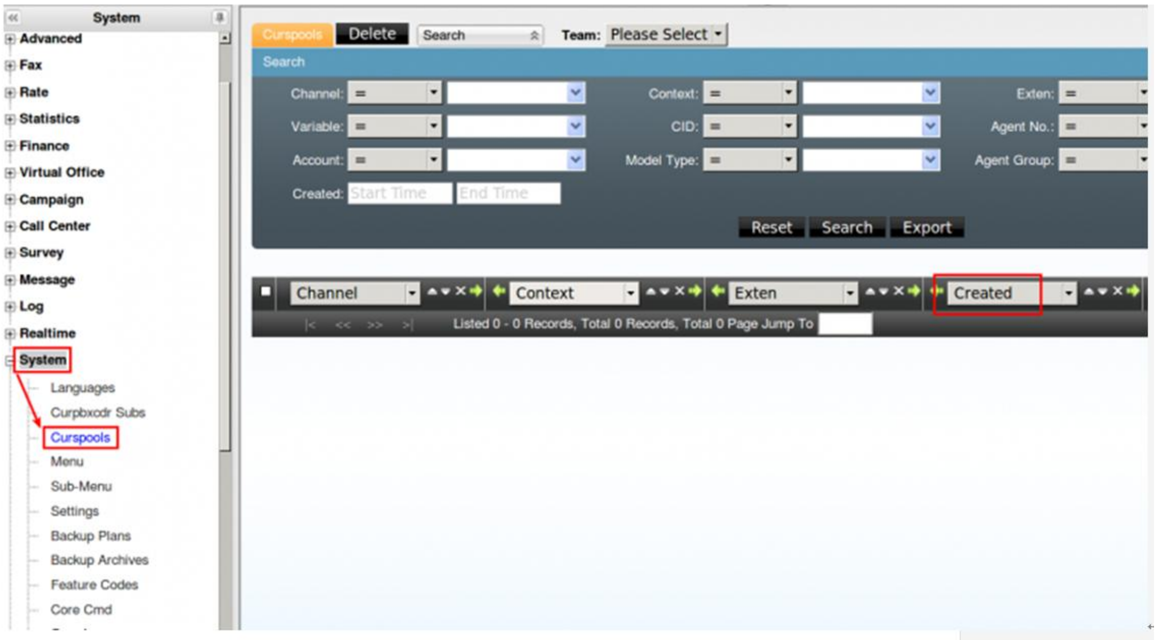
When dialer use "By Available Agent"，the number of concurrent=(Logged Quantity × Percent of Available Agent)/Answered Rate. No matter concurrent you set up，it no more than "Max Calls".

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:

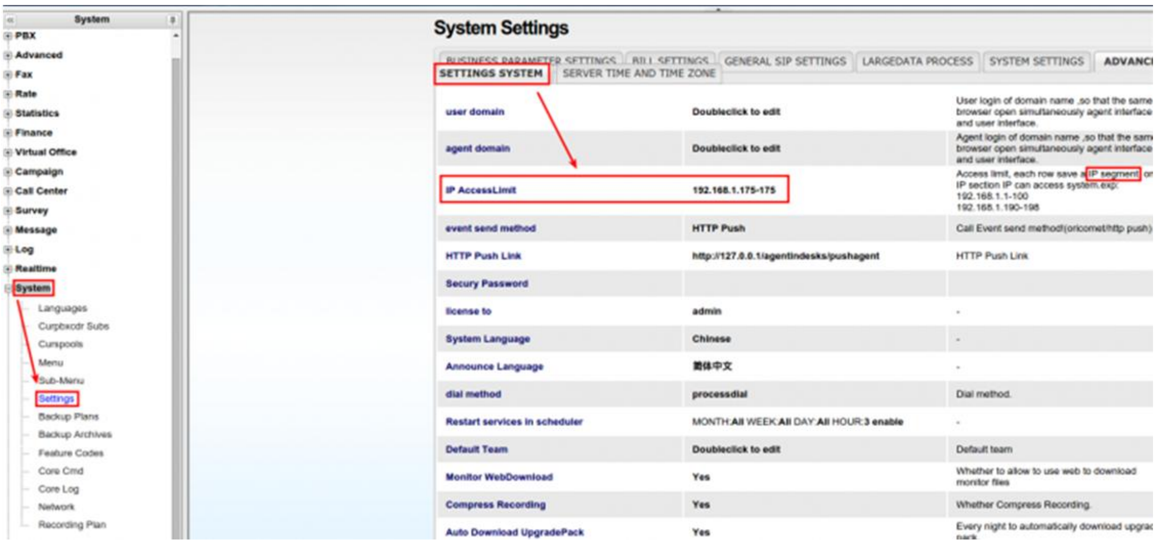
- System can not connect to internet
- Google map is disabled
- Google map file loaded failed

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 privilage in system.
- Team admin: to manage a team, have full privilage 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.

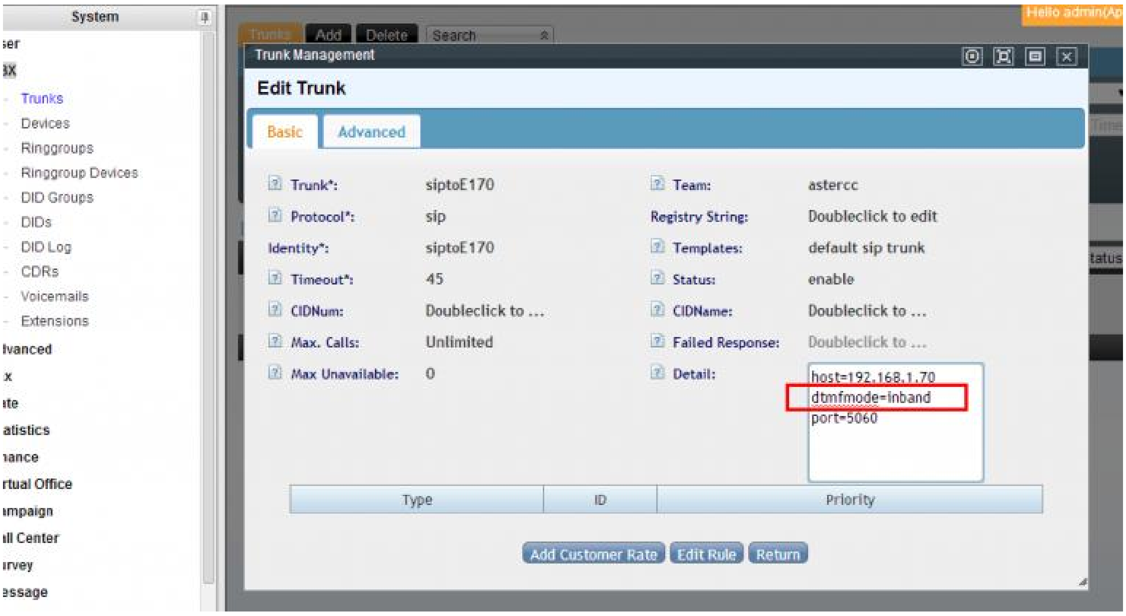
Set DTMF

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
```

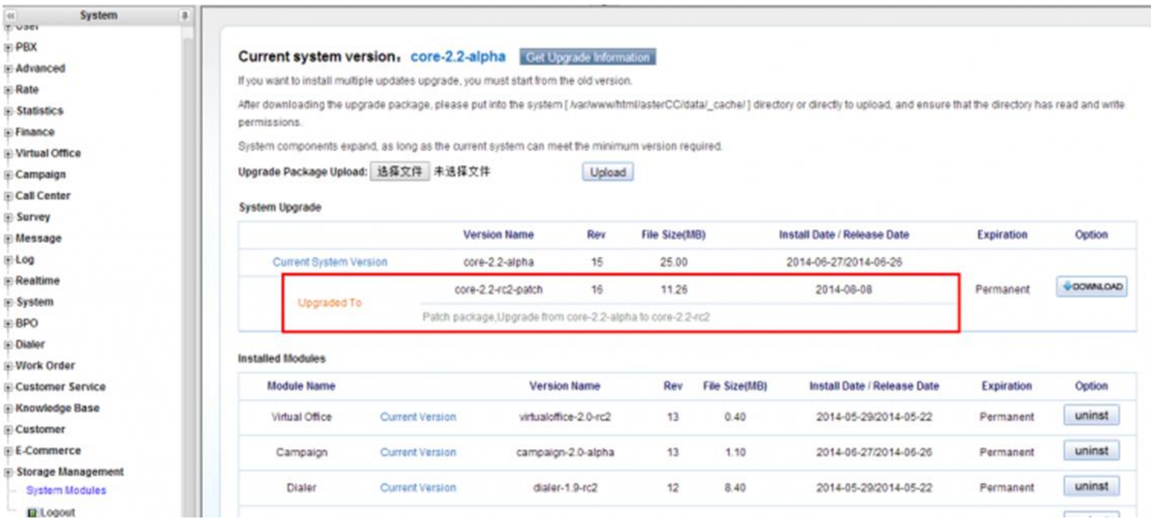


How to config DTMF

- 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



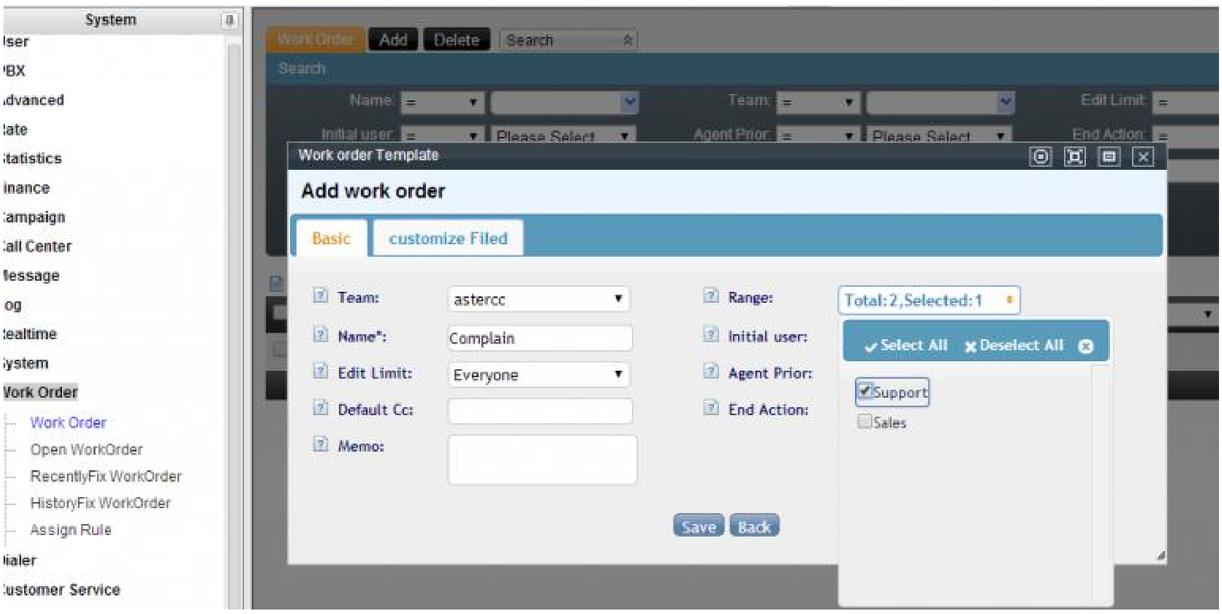
- Download the upgrade package, for core upgrade, usually it is very big, not easy to upload via GUI, you can download to your local computer and then upload to server via FTP or SFTP, or you can ssh to the server and download to VINA-PBX directly
- When you upload (or download) the package, refresh 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

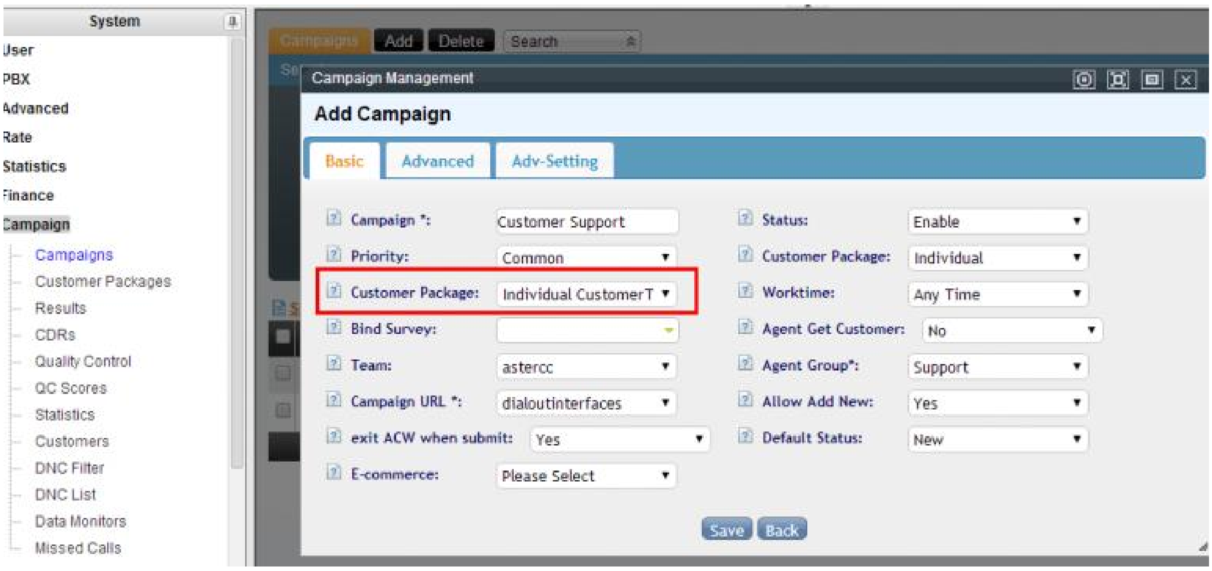
1)Config Work Order

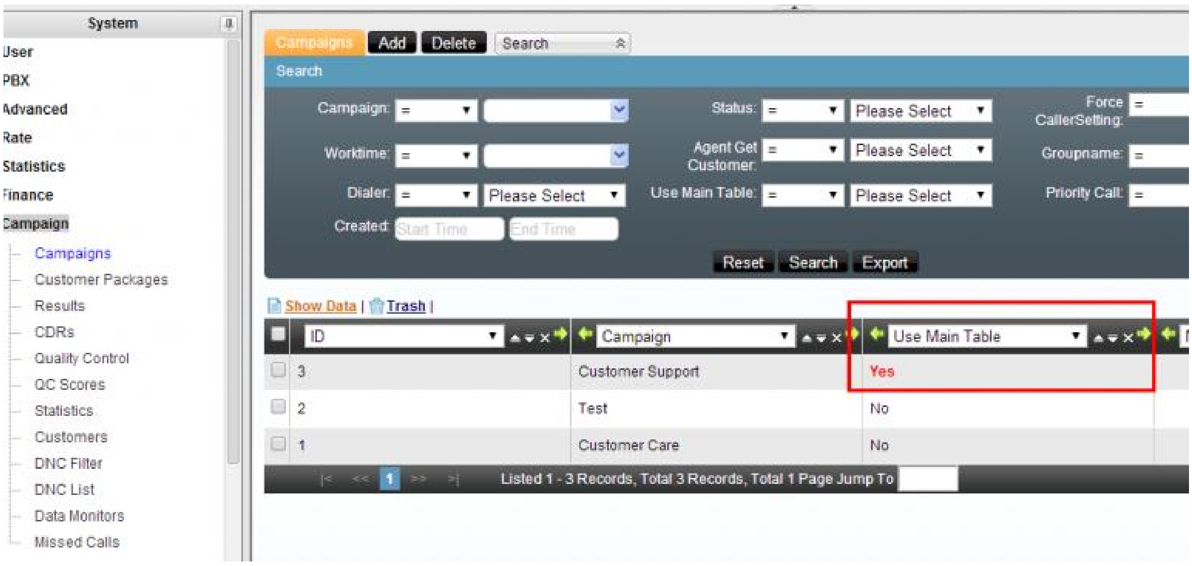
- Create a work order, in Range, you need to select which agent group(s) could use (create or get involved) in this work order



2)Config Campaign

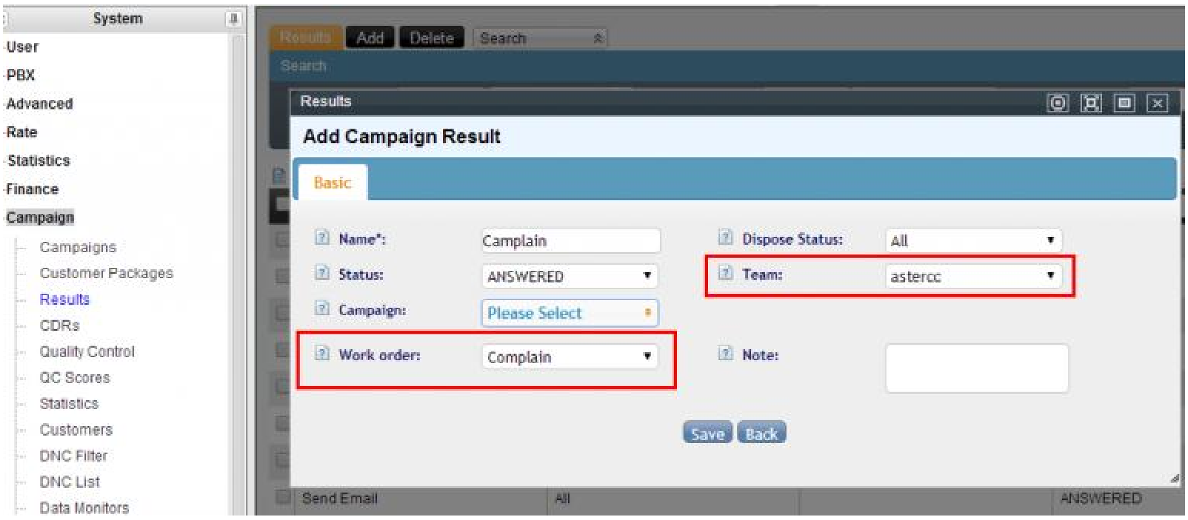
- To use work order in a campaign, the campaign must use main table





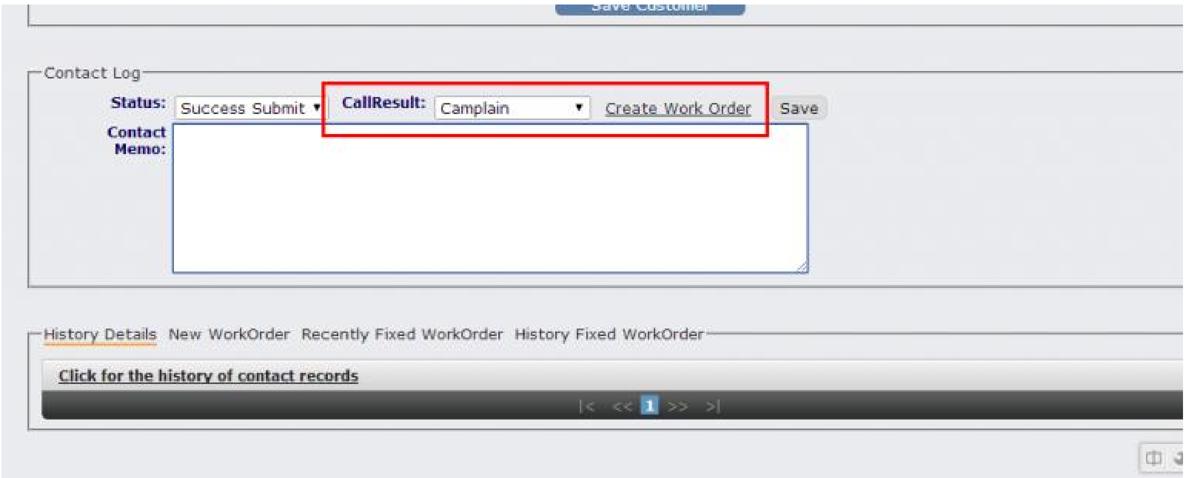
You can't change Customer Package when the campaign is created

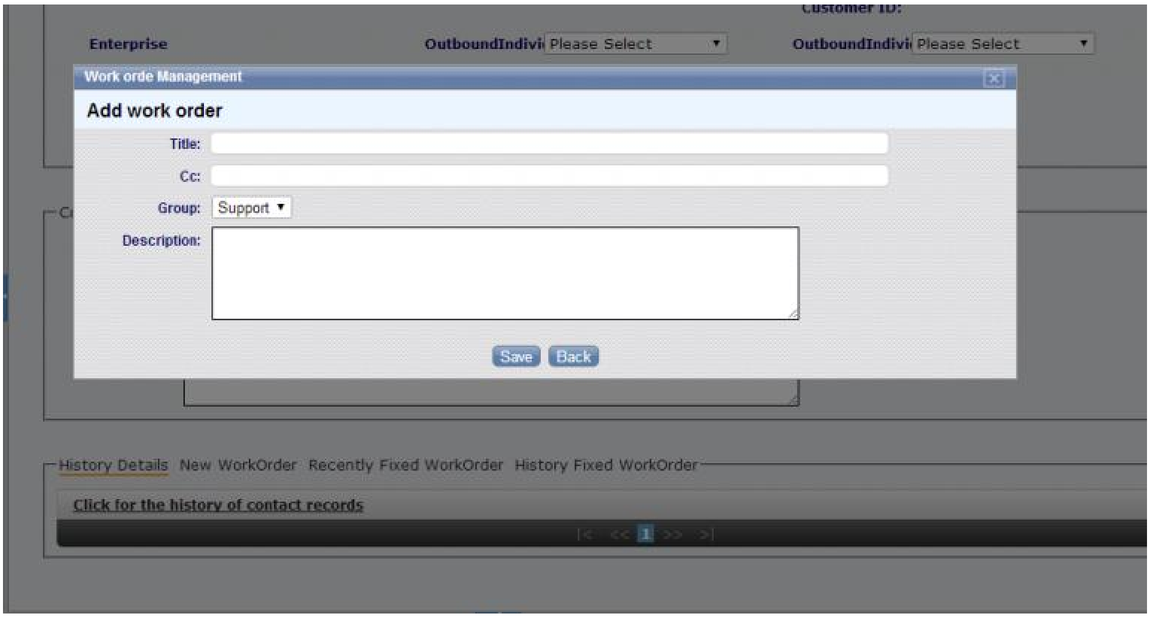
- Bind the work order to a campaign call result



3)Create Work Order in campaign popup

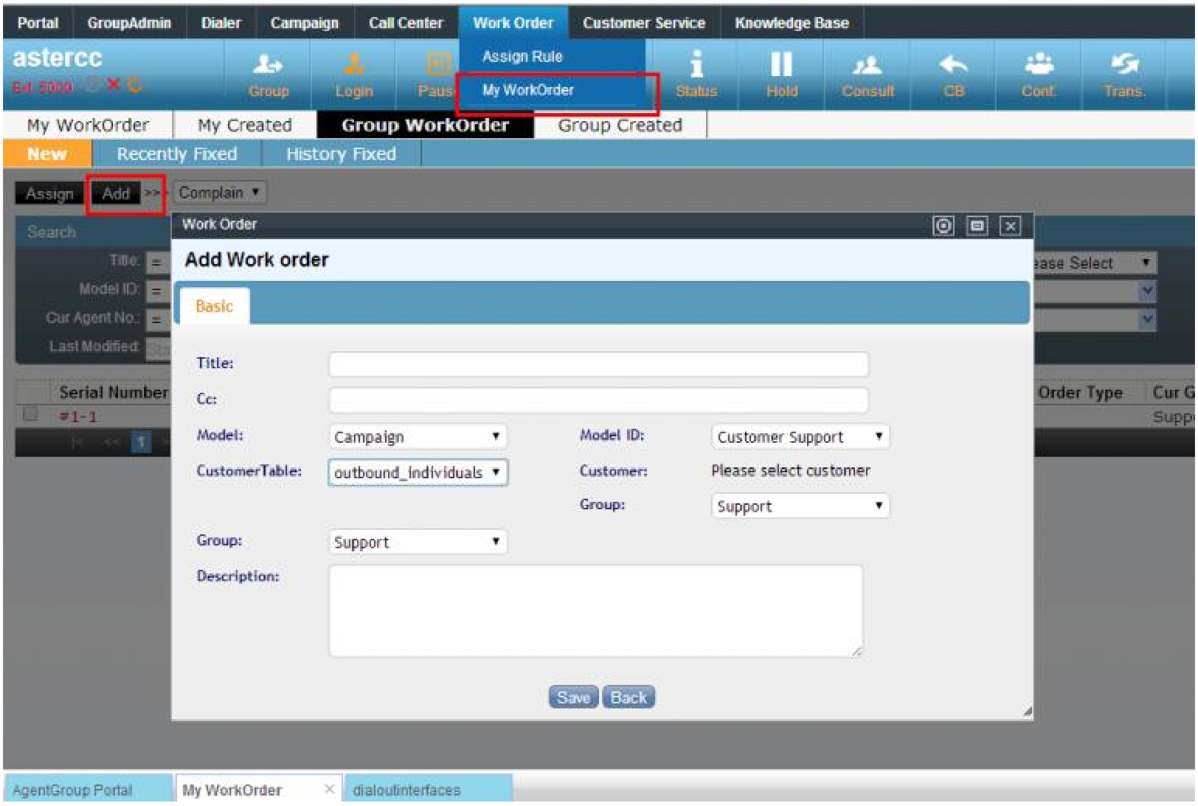
- In the campaign popup, select the call result which is bind to a work order, you can see a link to create the work order





4)Create Work Order as group admin

- If agent is group admin, he can go to Group Work Order to create one



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.

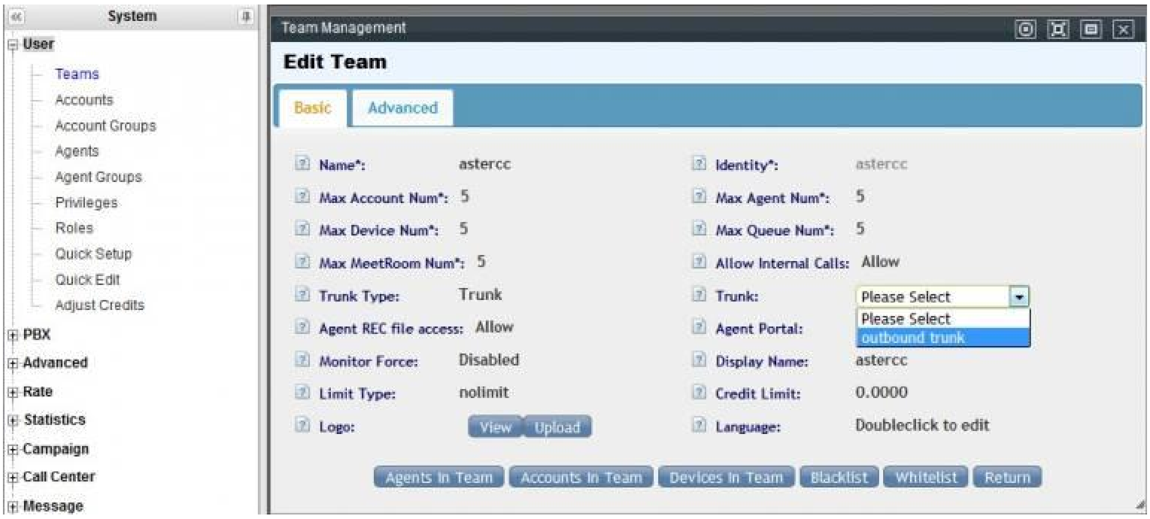
We will learn how to config the following features in asterCC:

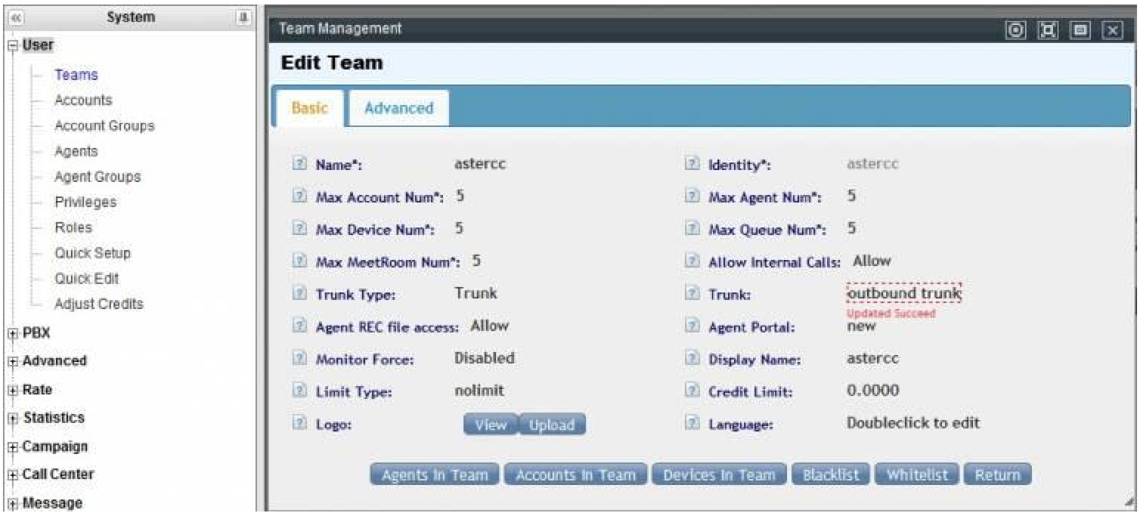
1. setup a phone system
2. config a campaign
3. import customers and assign
4. agent portal
5. config email server
6. config fax

3)Outbound Testing

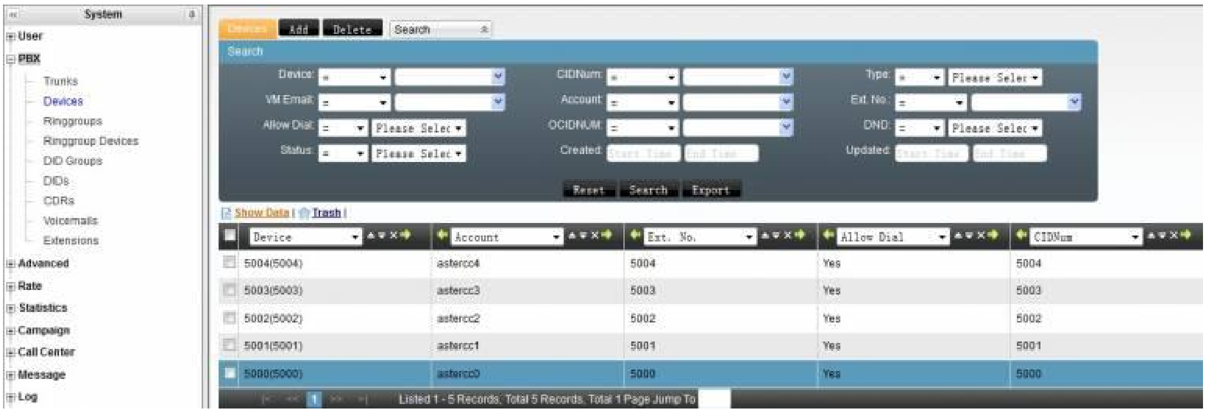
Now we test if the extention of the team can call

- 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

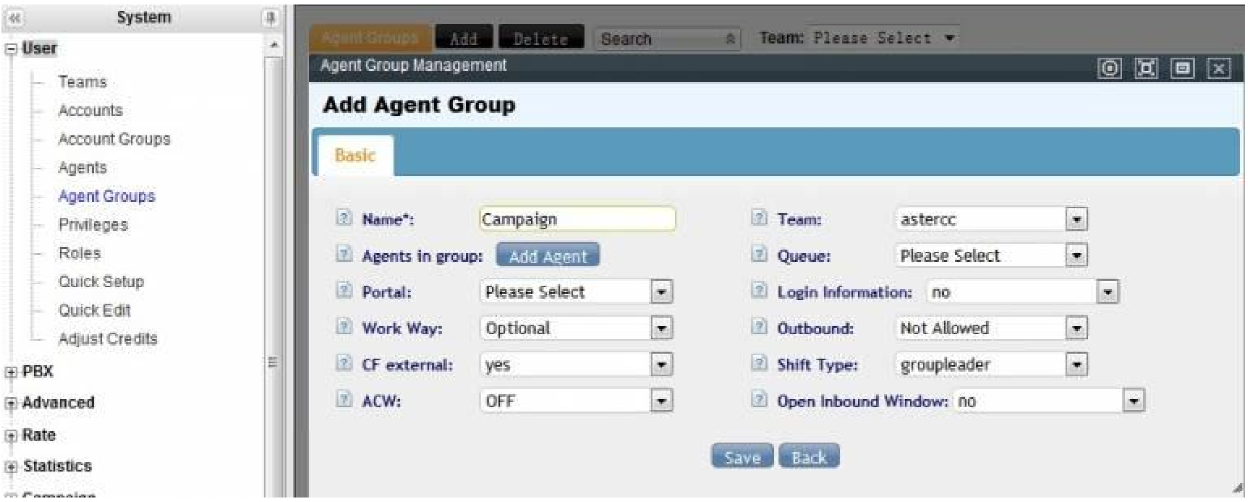


- Register a soft phone
- try to call, and if there are problems, continue the checks on the trunk.

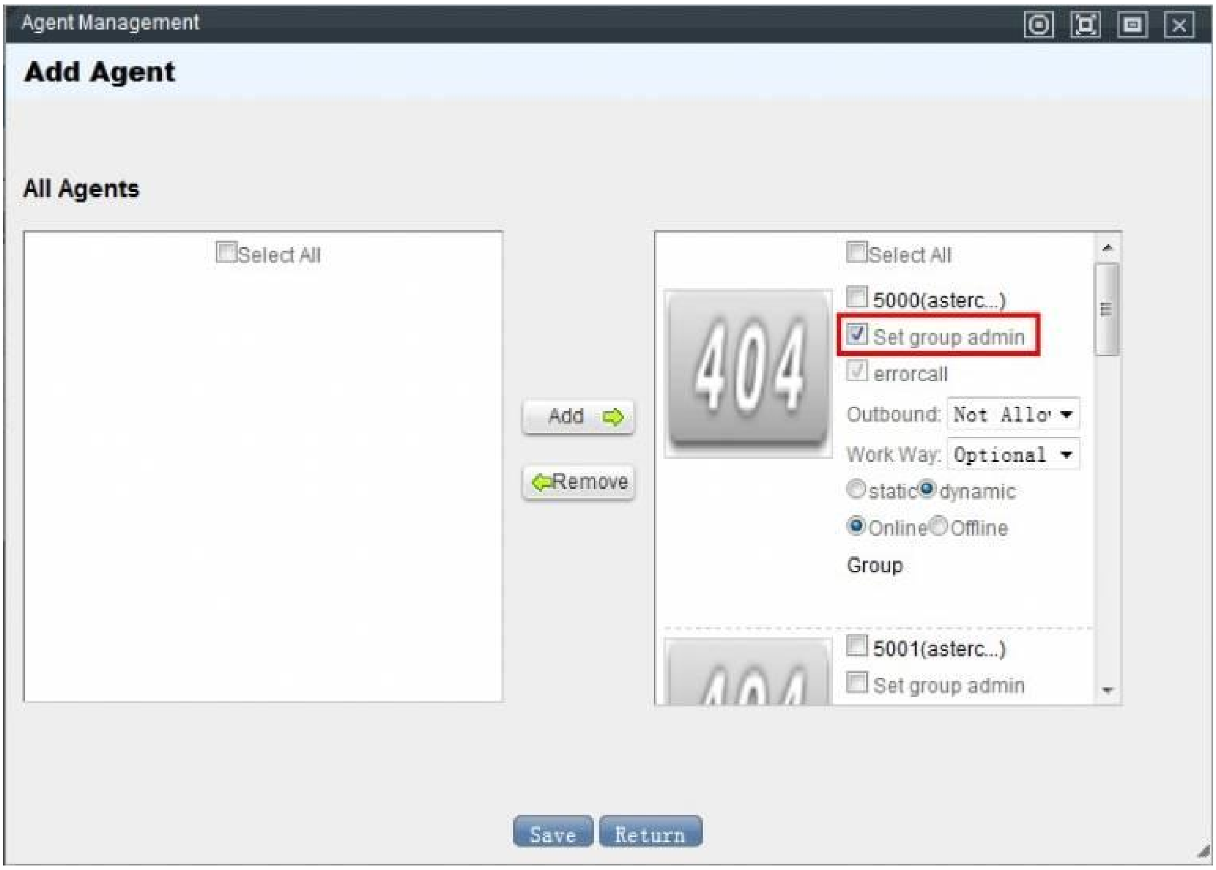
4)Creating Agent Group

To achieve better service, we need to build a agent group to answer the customers who need operator services.

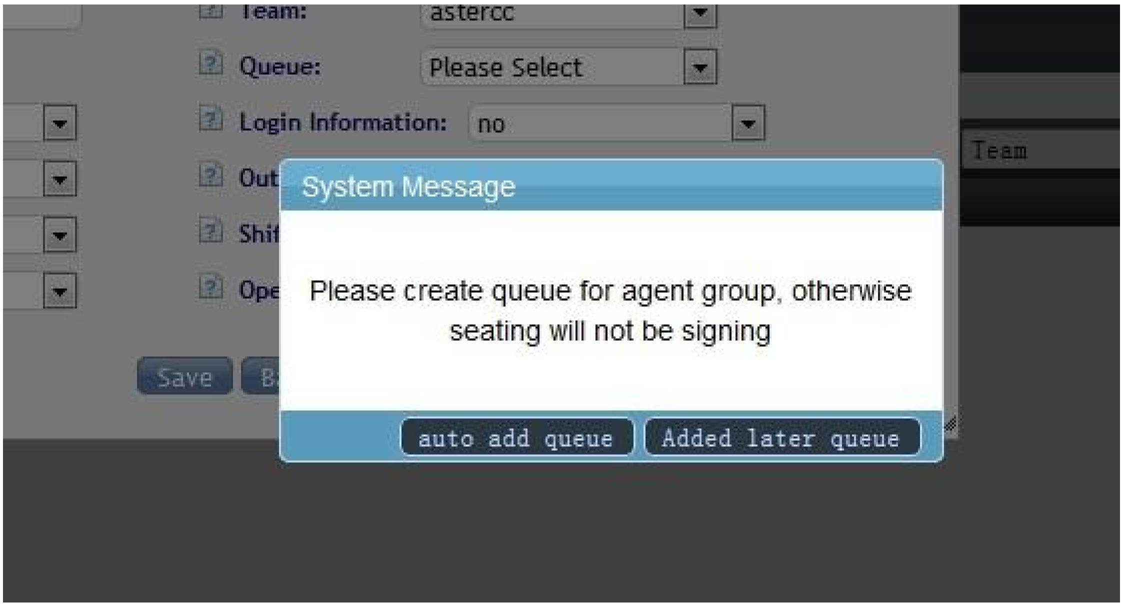
- In the menu on the left, choose User→Agent Groups,and *Add* agent group.
- Portal: When agents login the agent interface, the system will open a page by default. Here we choose *default*.



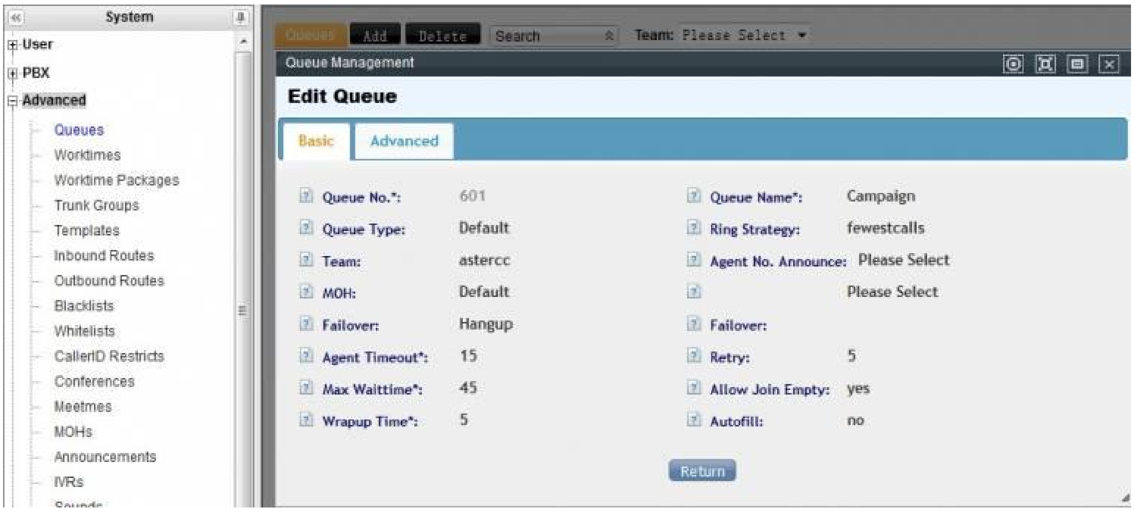
- Click [Add Agent], and select the agents into the group, then save.
- Here we assign agent number 5000 the monitor of the group.



- Each group needs a queue, 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".



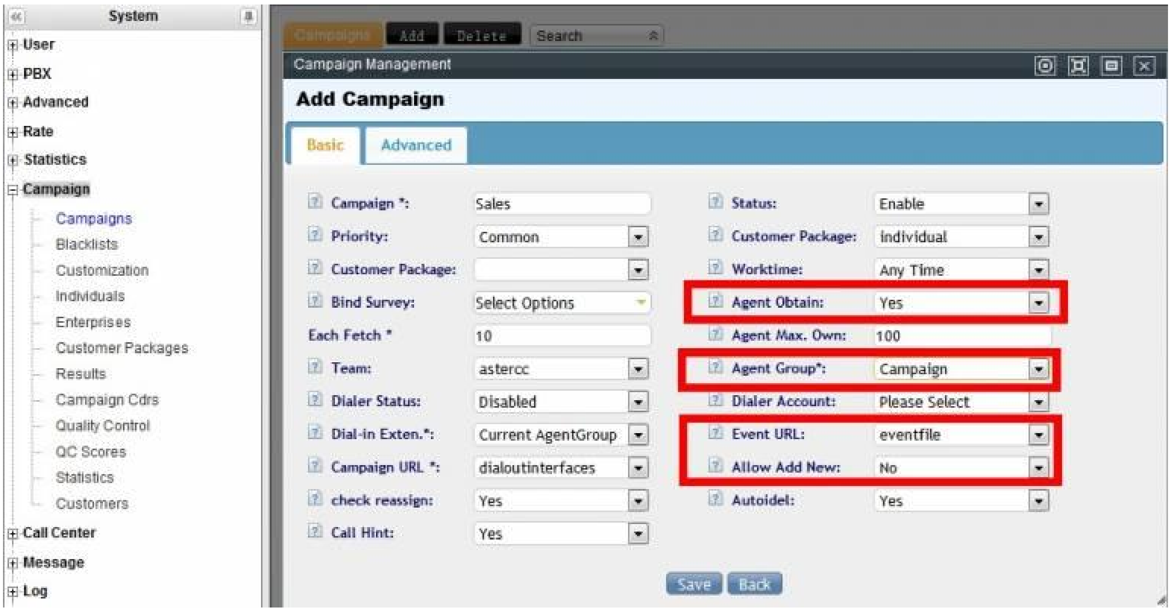
- In the menu on the left, Advanced→Queue: In the Queue management page we can see the automatically added queue. Double-click to modify.
- In this case, agent would not receive calls from the queue, so we don't need to change anything



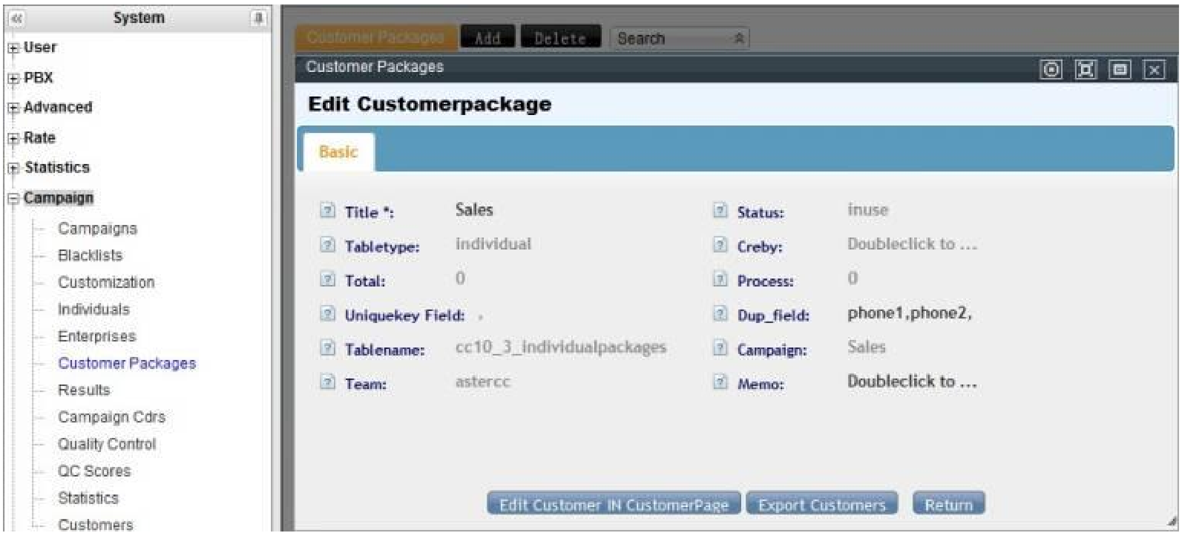
5)Creating a Campaign

- 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.

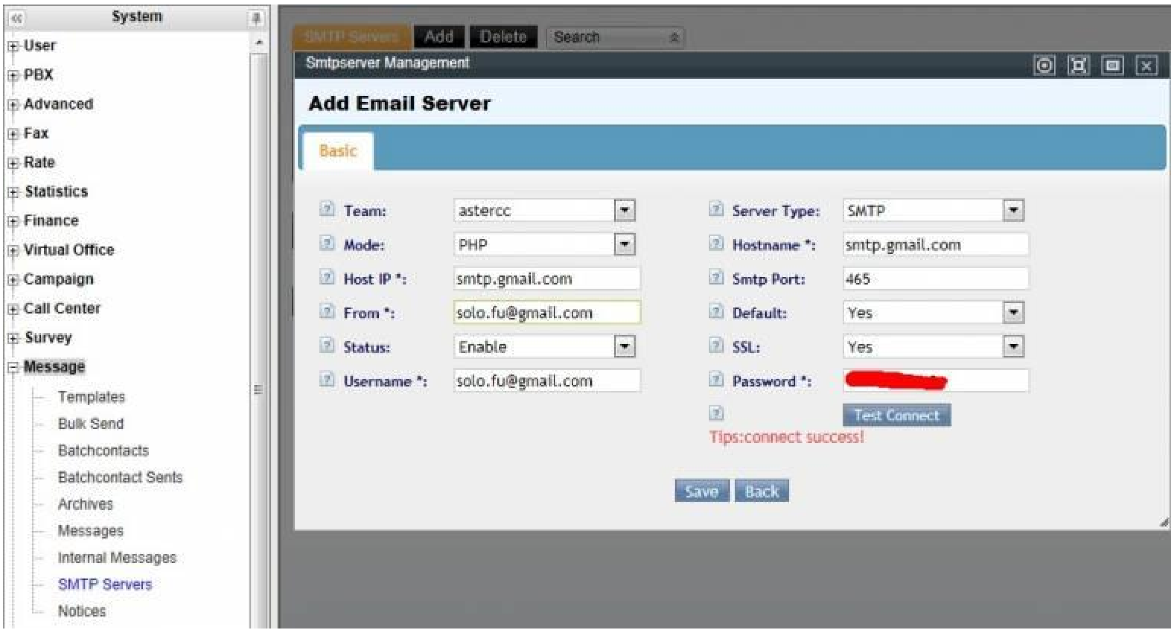


- click Campaign → Customer Packages, you can see the customer package created by system for this campaign
- a customer package will store the customer information which is waiting for dialing in the campaign.



6)Config a Email Server

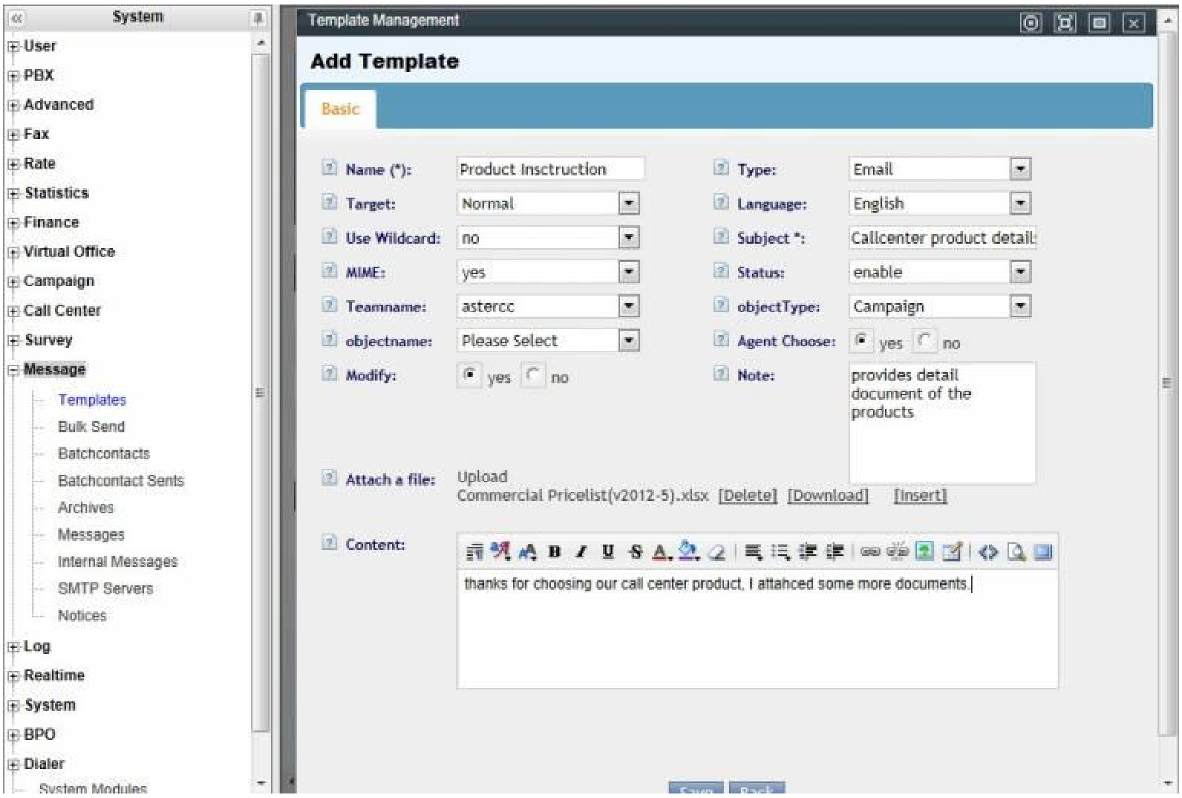
> if you dont need send email in the campaign, you dont need a email server, just skip this section



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.

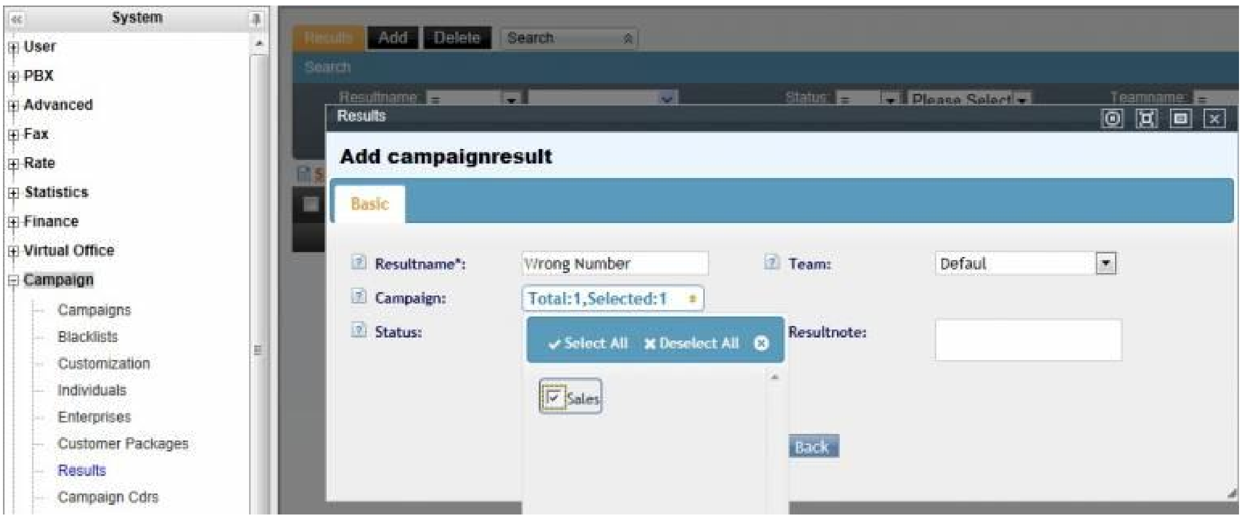
- click Messages → Templates，click [Add]
- “objectType” choose “Campaign”
- “objectname”: you could select “Sales” which means this template is only available in this campaign, if not select any, means it's available in all campaigns
- “Agent Choose”: “Yes” means agent could choose this template in the campaign
- “Modify”: “Yes” means agent could modify the template before sending to customer (this modification would not change the template)

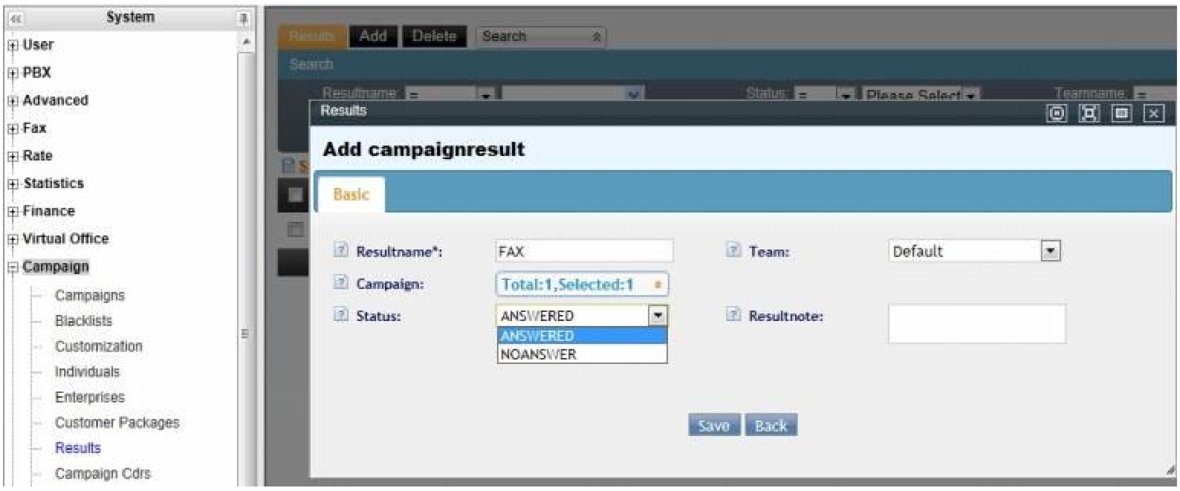


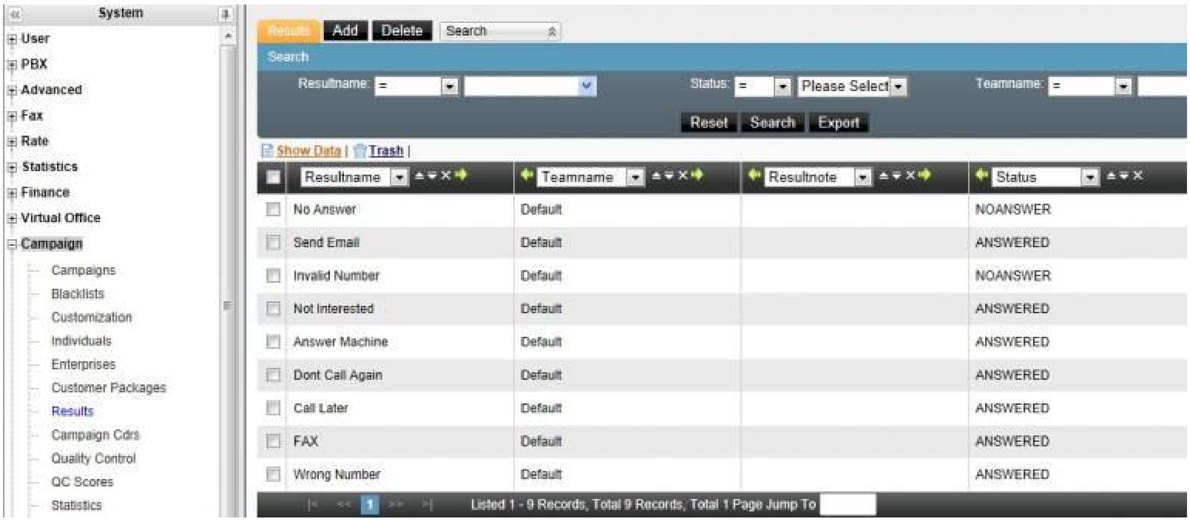
8)Config Campaign Result Code

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.



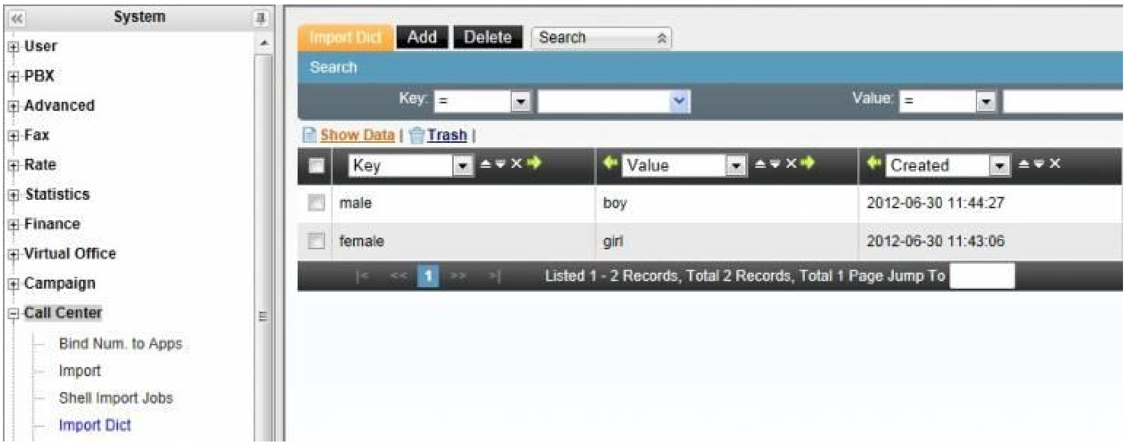




9)Config Dict

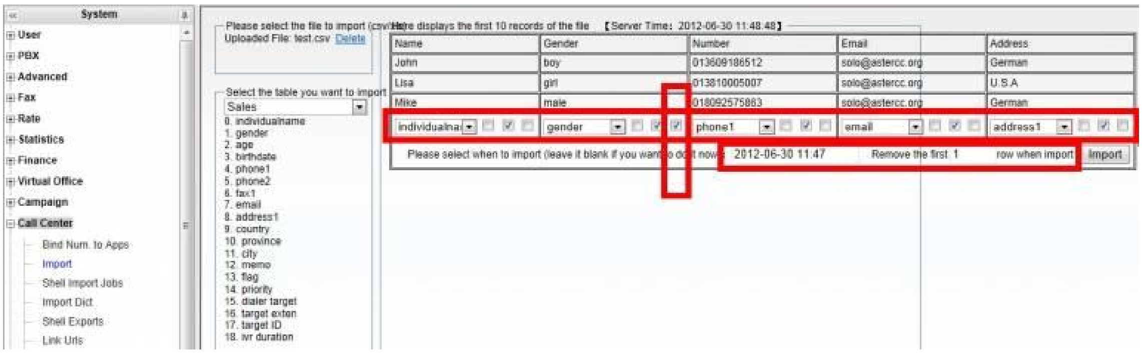
In order to unify the data format, the system supports “dictionary”, here we config a dictionary for gender

- 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

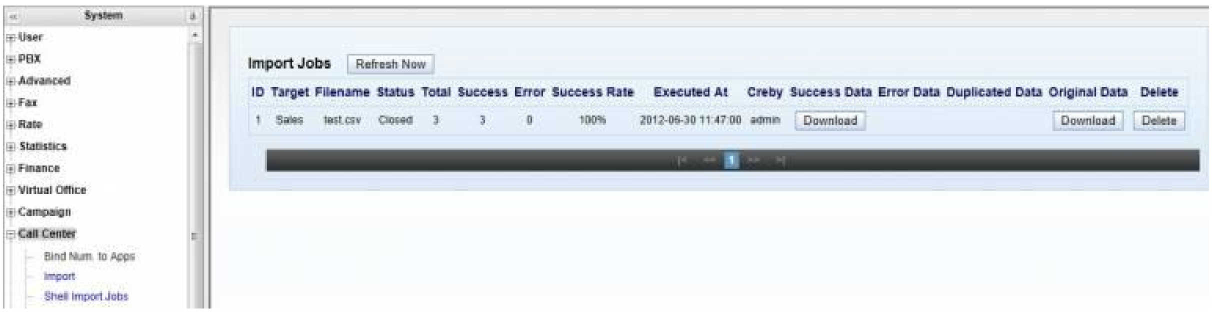


10)Import

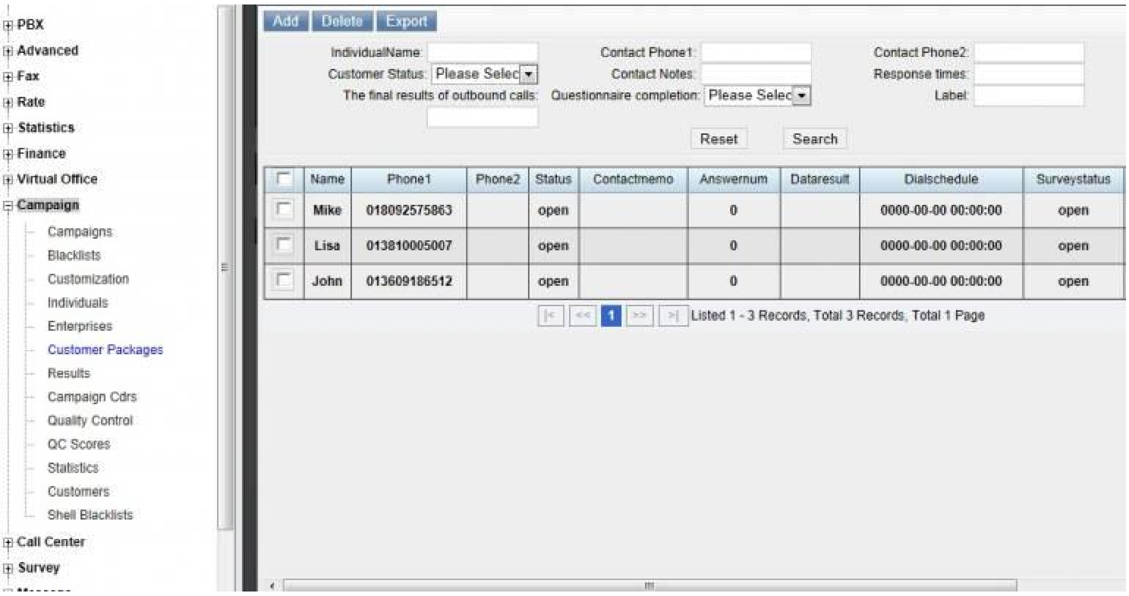
- go to Call Center → Import
- upload the file you want to import (csv or excel)
- choose the package "Sales" on left drop down menu
- select the field we want to import under the column
- check the first checkbox for view only, the second checkbox for edit
- for gender, check the checkbox "dict"
- put remove the first 1 row for removing the title
- ignore the warning

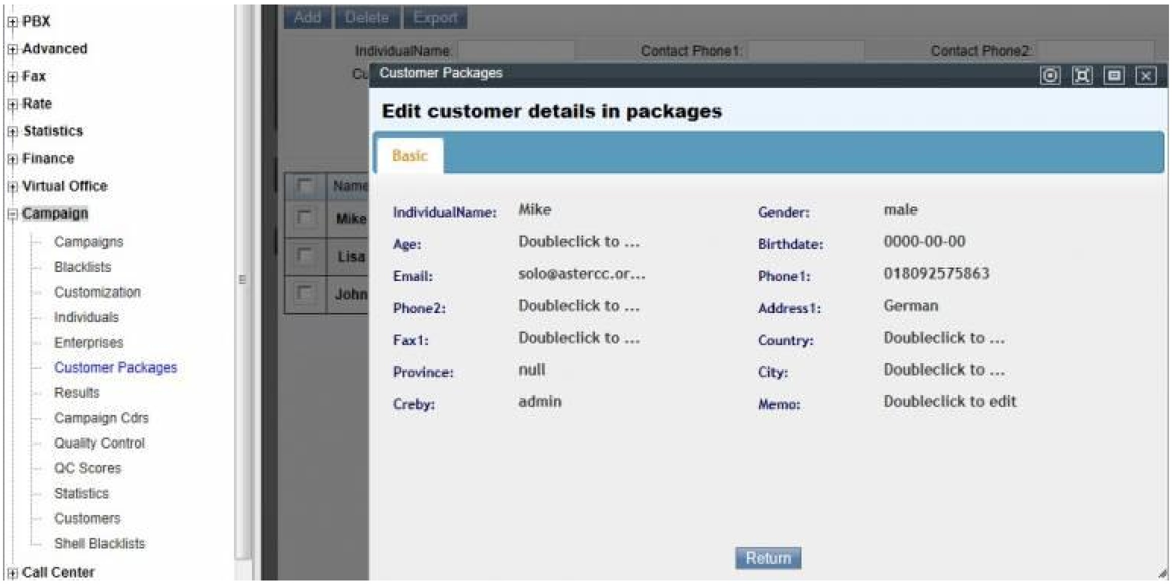


- go to Call Center → Shell Import Jobs
- the import job should be finished in 2 minutes



- 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

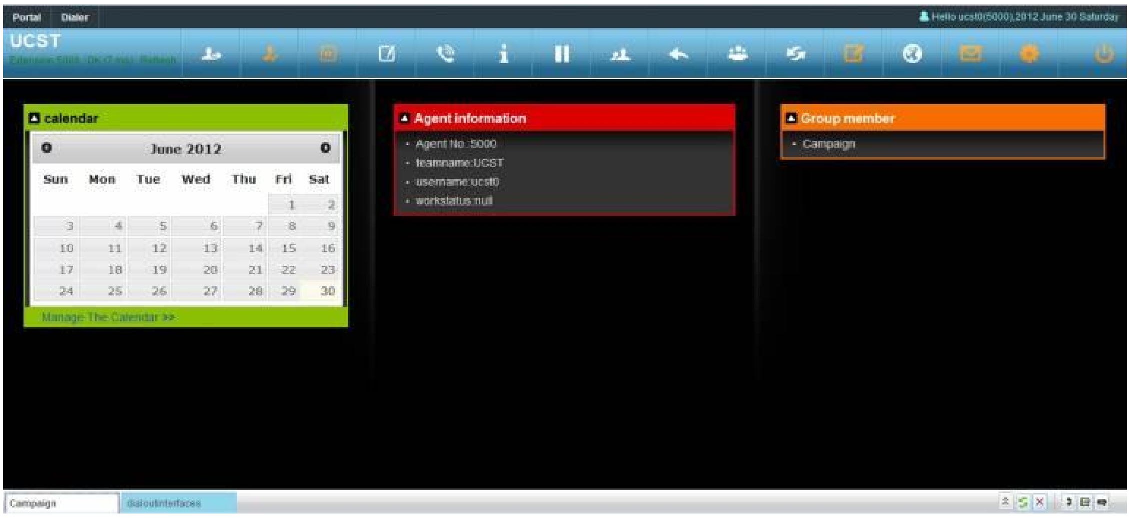




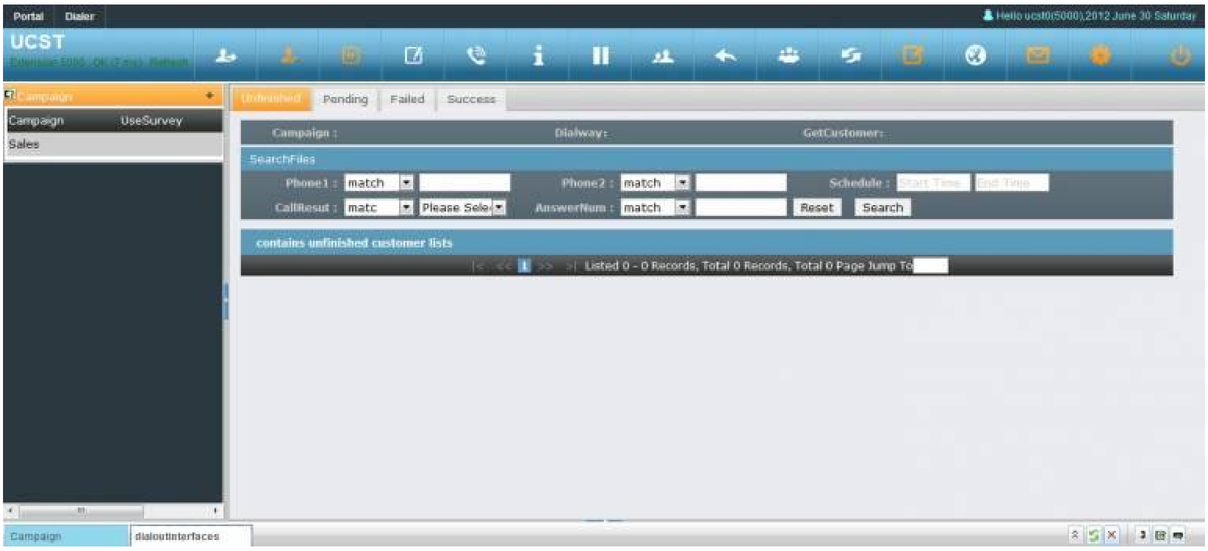
11)Agent Portal

login from an agent account

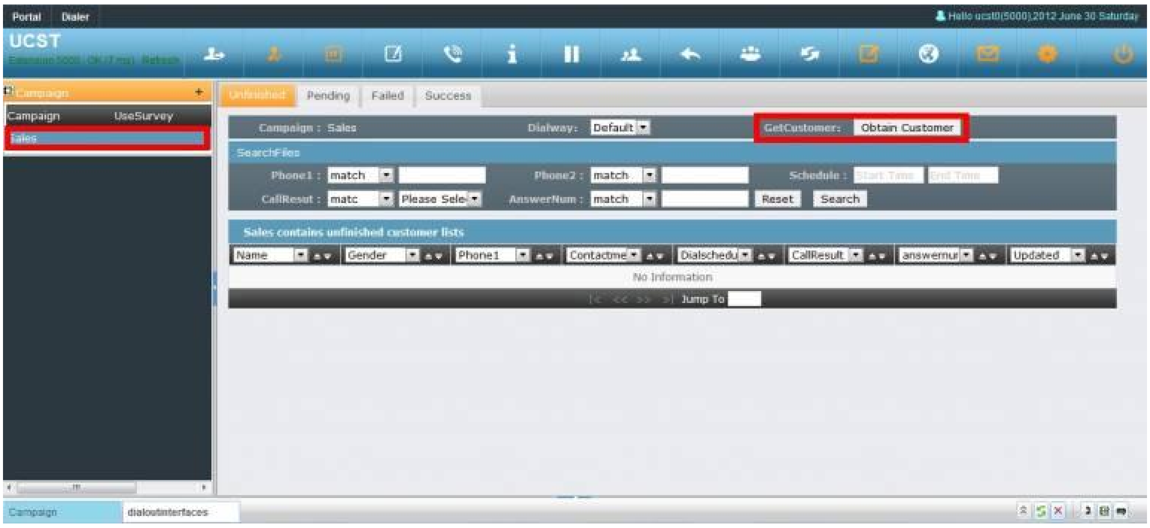
- the agent portal is



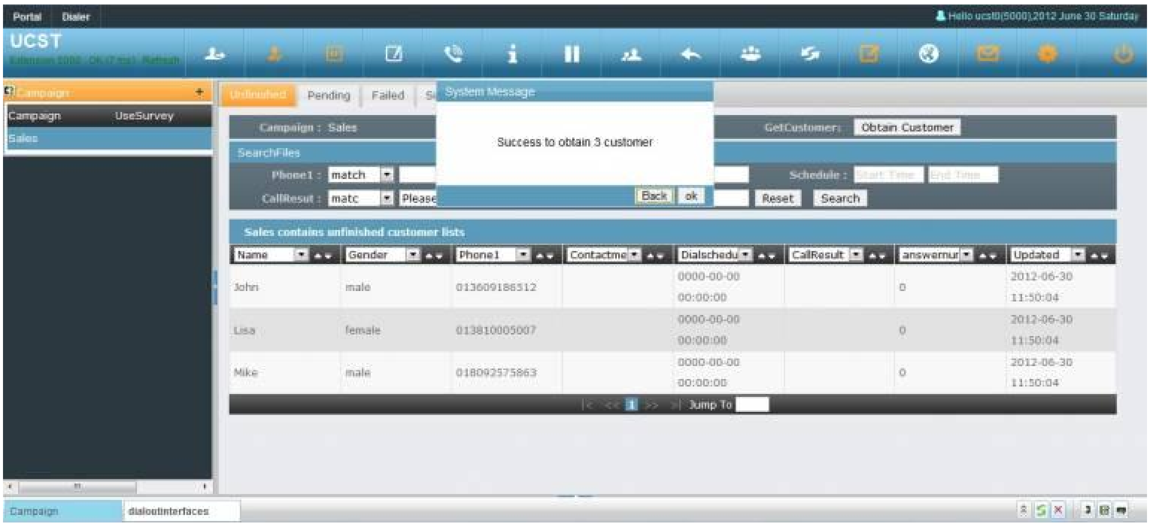
- click tab "dialoutinterface", open campaign module



- 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

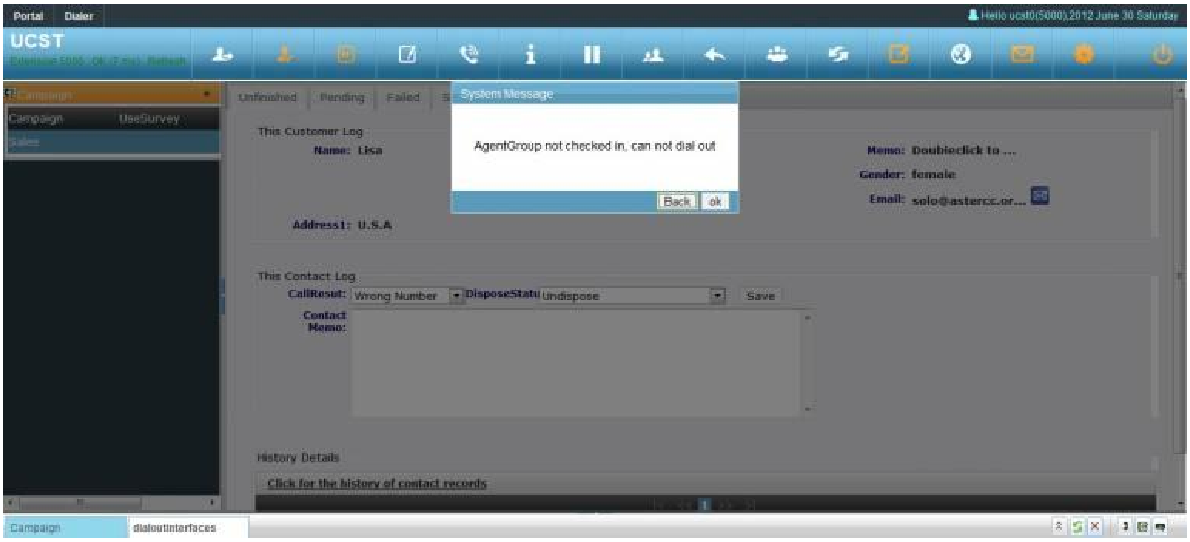


- we only imported 2 records, so this time, agent only get two



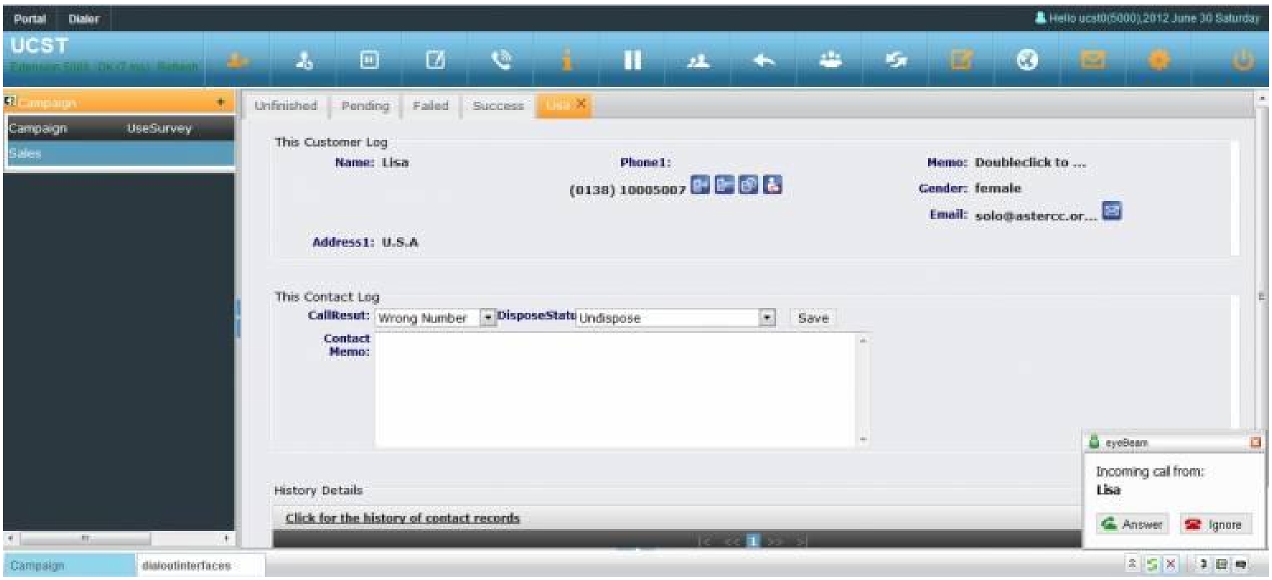
- double click to open the customer

- click the icon after the phone number, system prompt that agent need check in first



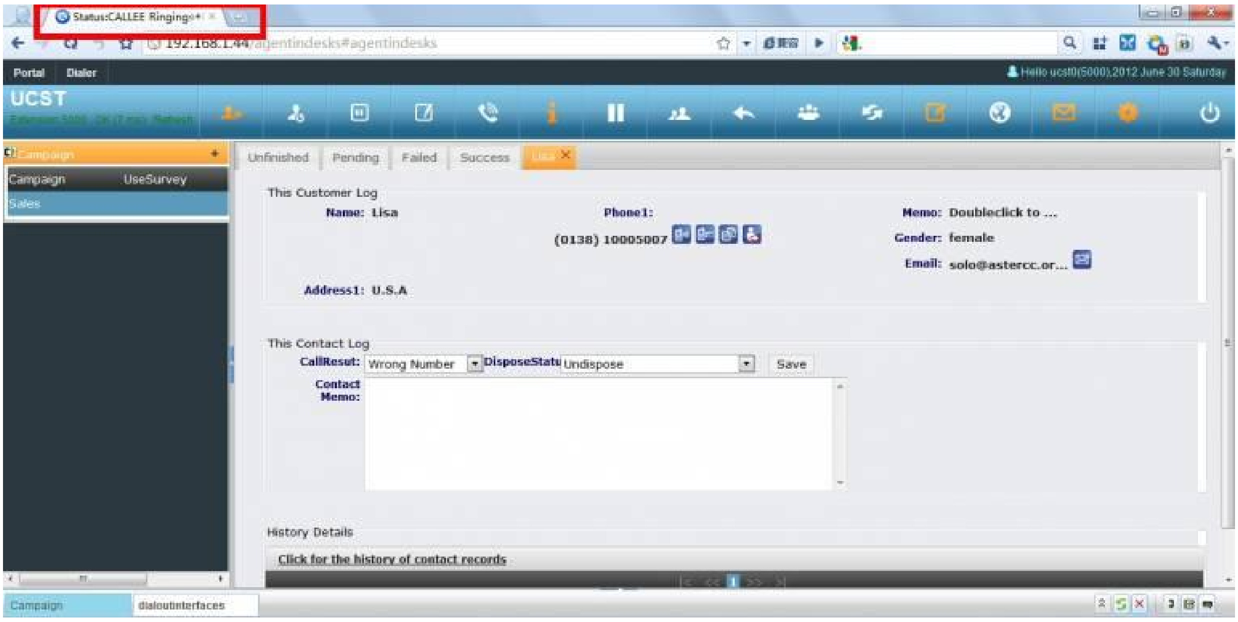
- click the agent group icon (first one on tools bar), check-in the agent group

- click the call icon again, agent phone ring

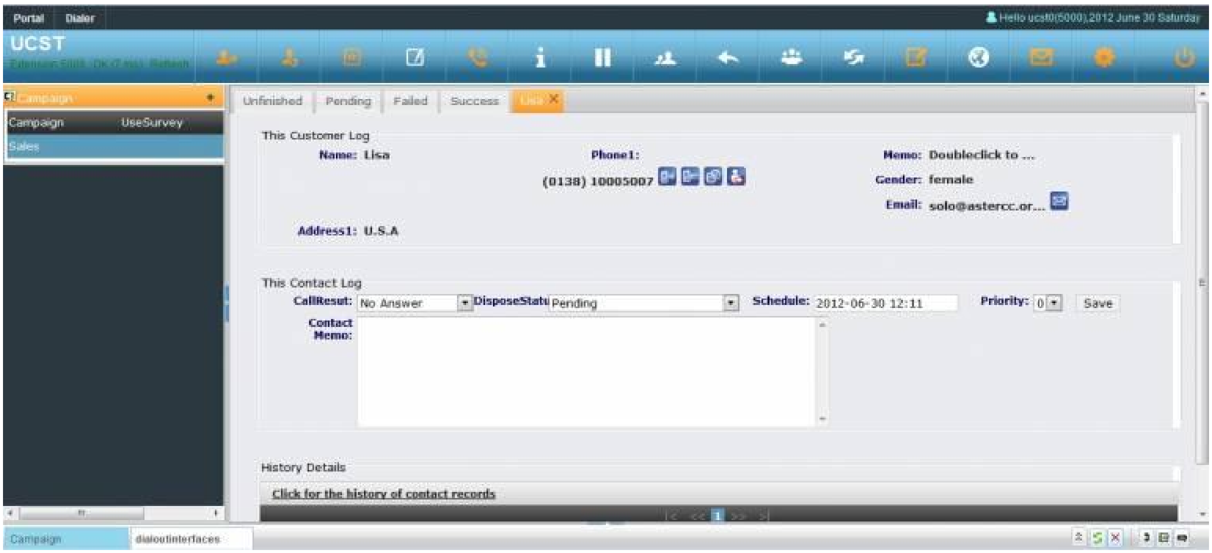


- after agent answered, system will call customer number

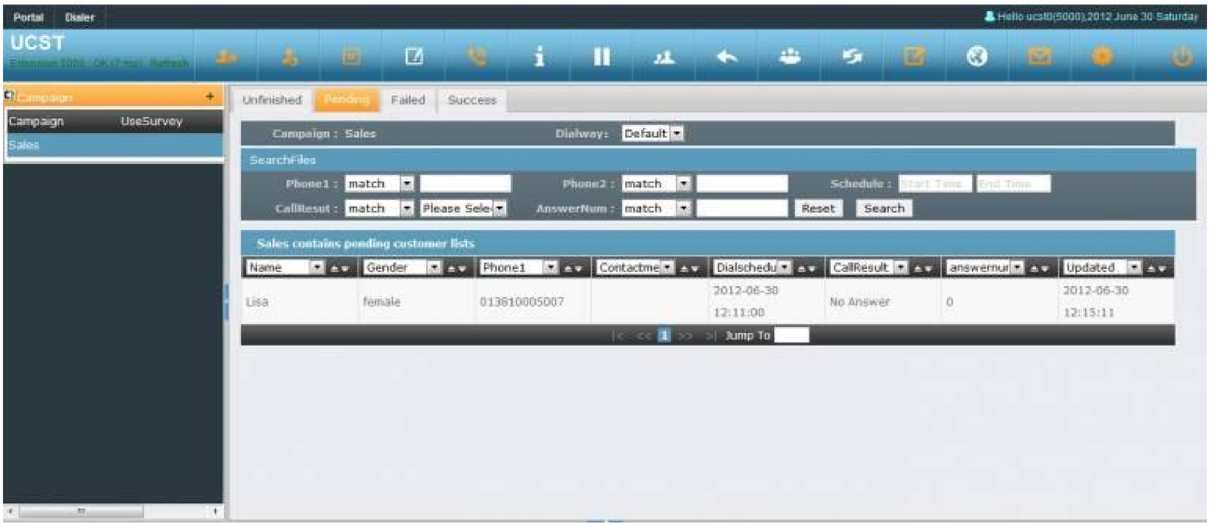
- from the browser title, we can see current status

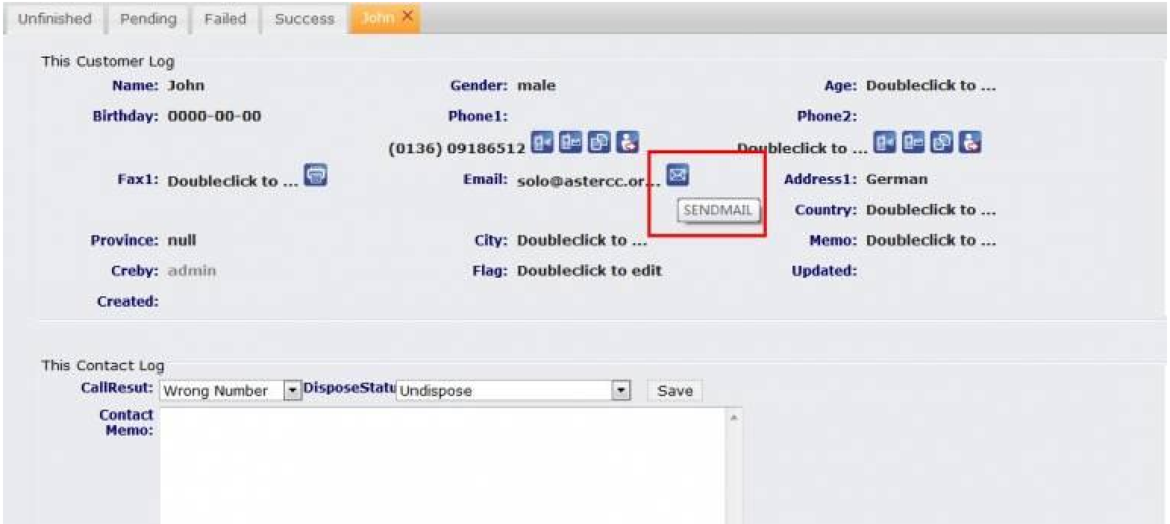


- when select "pending", system will ask for a scheduler and a priority



- click the tab, you can see the customers under different tab

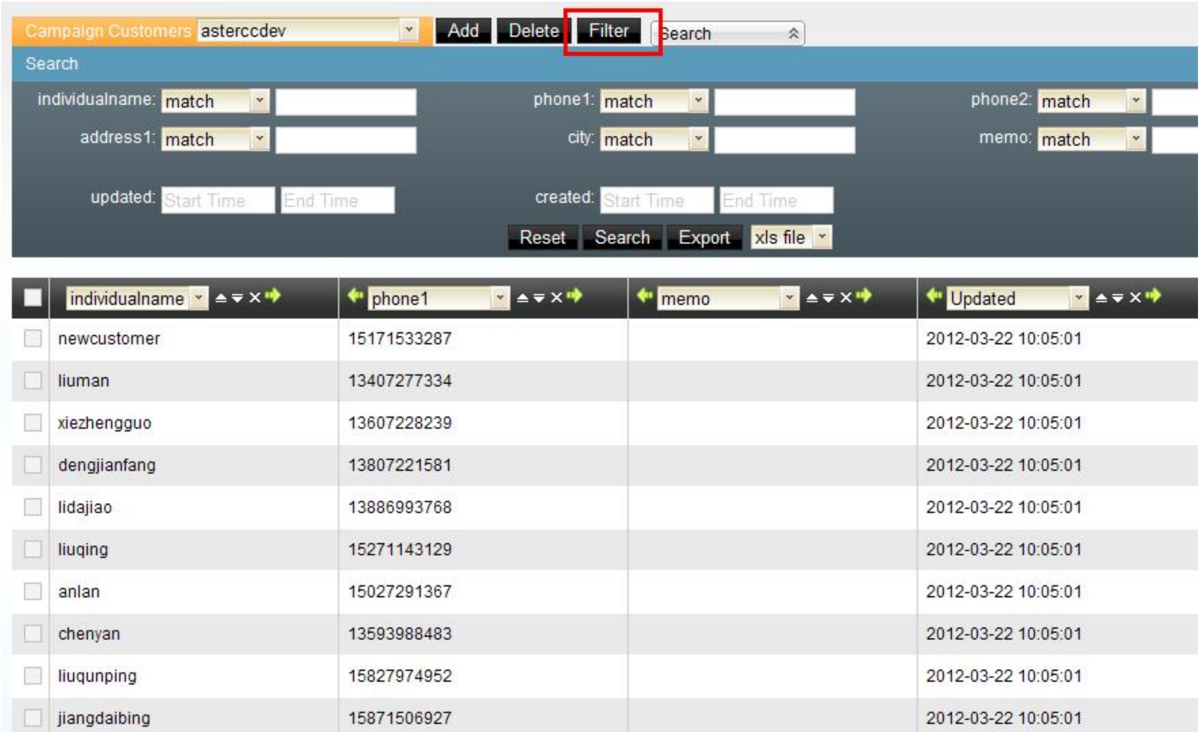




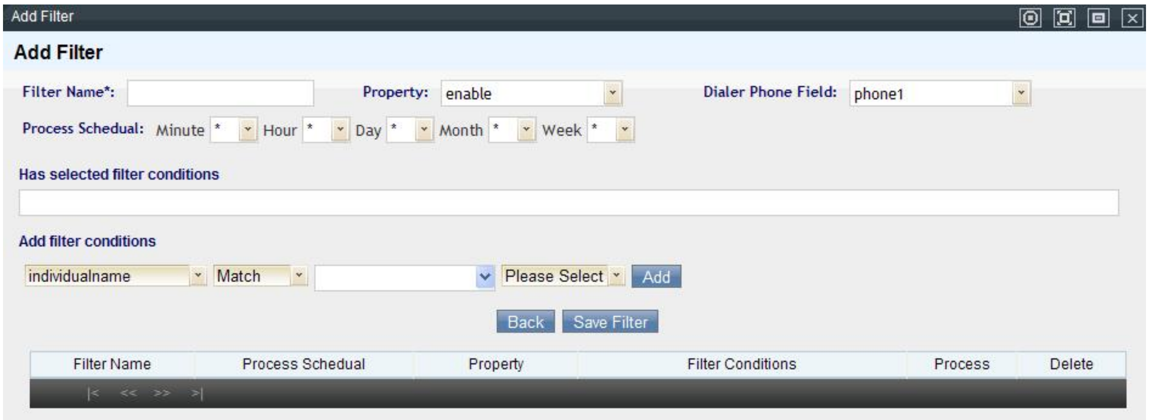
26.3 How to configure the filter

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- Compaign customers:



Open “Add filter”.



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 schedual: 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:

If you want the filter to perform at 9:15 on the first day of each month, set it like this:

If you want the filter to perform at the 15th minute of each hour on every Monday of March, set it like this:

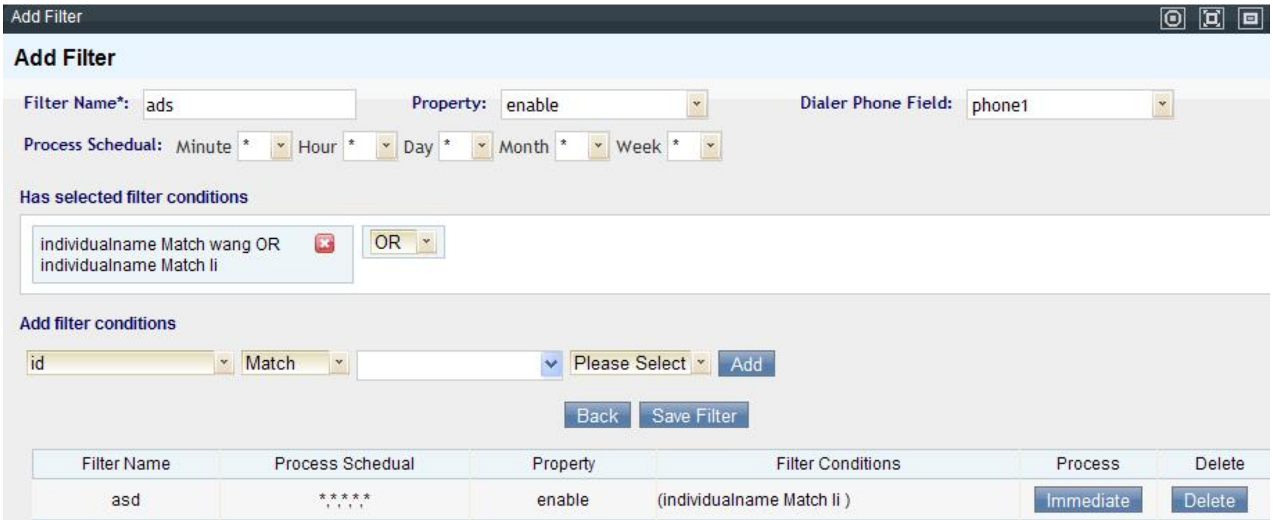
Through those exmple you can better understand the rule of setting the time. "Day" and "Week" cannot be set at the same time.

Now, set the filter conditions

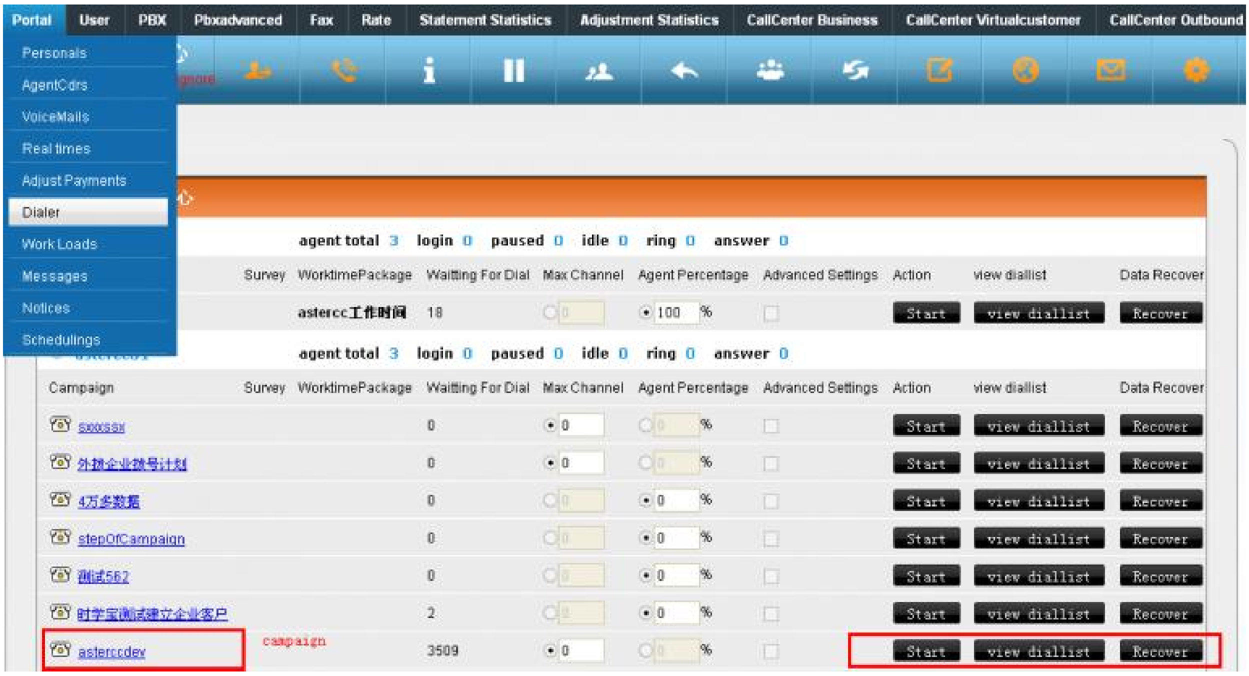
In the "add filter conditions", choose the field name you need to set and the condition which including Match, Less than, Equal, Greater than, Unequal. Enter the condition in the box. The choice box has all the logical relation.

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.

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.

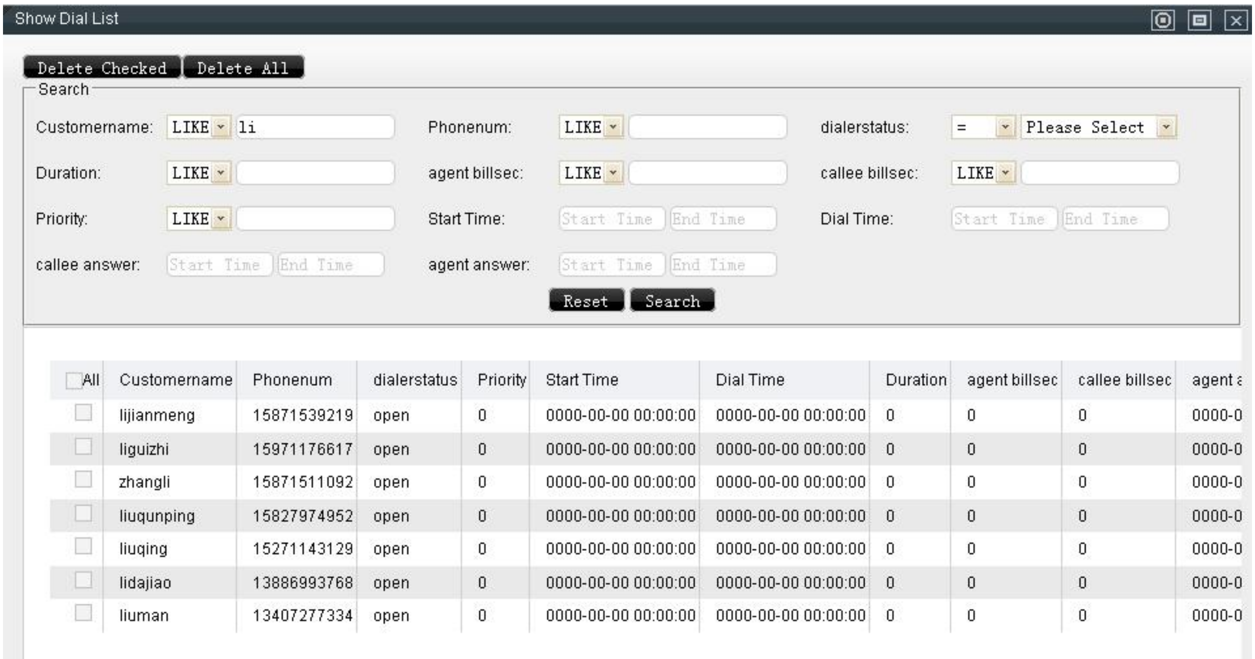


Now we have finished configuring the filter. You can log in the agent interface to see the dialer list.



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:



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 seeTrunk

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. SeeAgent 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.

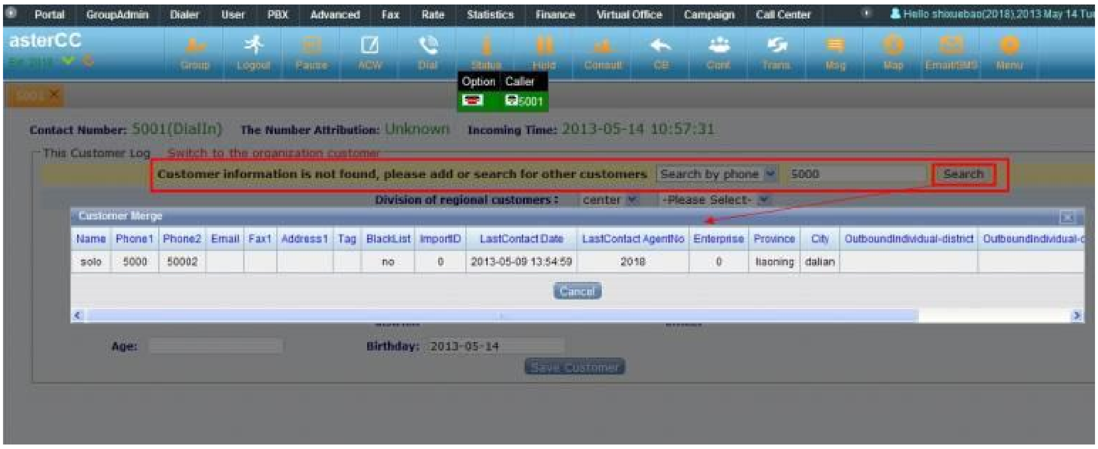
1.1New customer

If the call is from a new customer, an interface to be added by the agent will pop up.

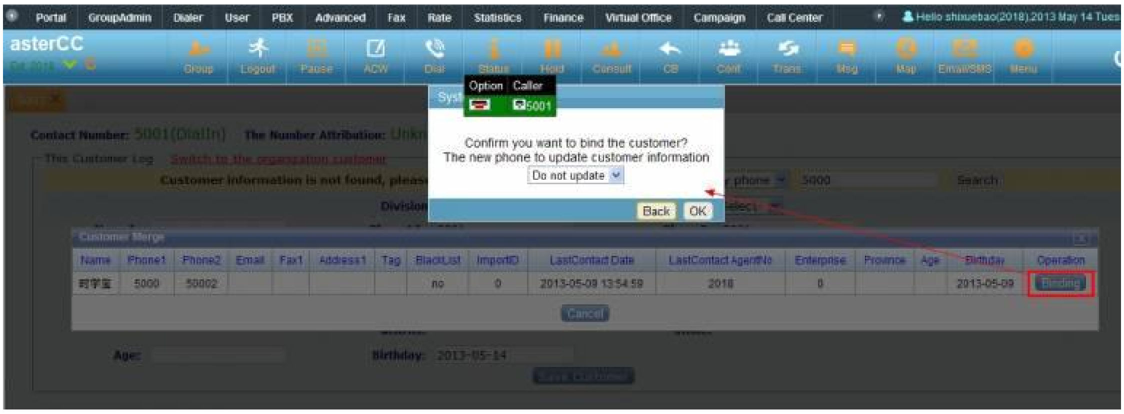
- ① the number that is calling in
- ② the number's area, which needs to be added in Area Code, or import the number attribution field through Import.

- 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.

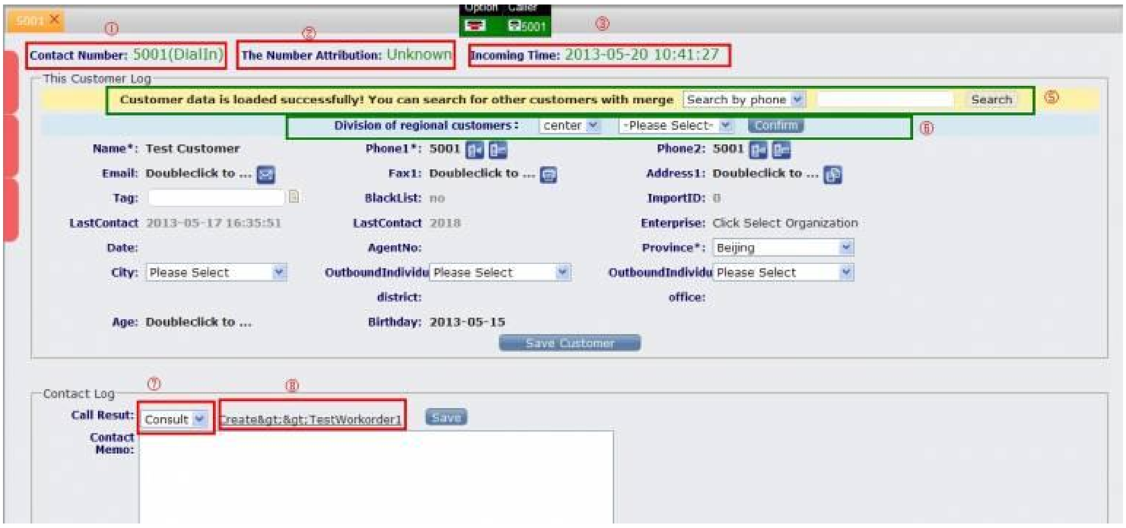
- Do not update: means not to bind the number to the customer.
- Phone number1 and Phone number2: save the number as phone number1 or 2 to the customer. When next time this number calls in, the binding information will pop up.

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.

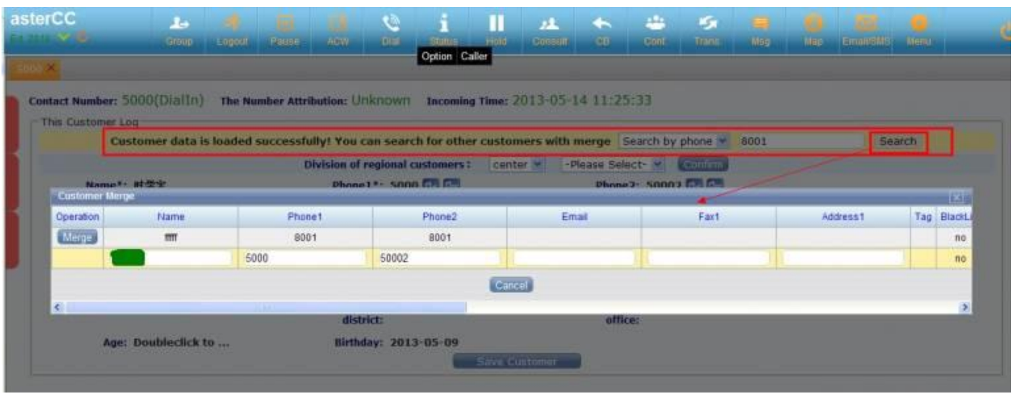
1.2Pre-existing Customers

If the number calling in already belongs to a customer in the system, a page with customer information will pop up.

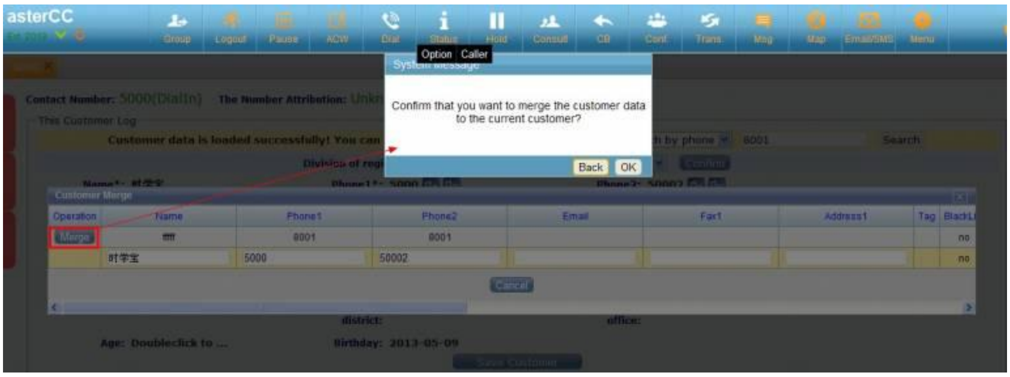


- ① is the number calling in
- ② the number's attribution, which needs to be added inArea Code, or import the number attribution filr through Import.
- ③ the time that the number calling in
- ⑤ You can search whether the numbers that call in have already been in the system by the numbers.
- ⑥ To assign 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:



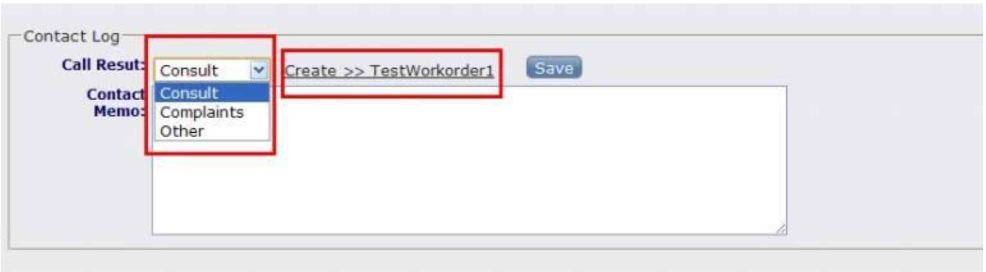
Choose a customer, click the bind button ahead, and a tip will pop up:



Click Ok and bind the customer with the customer that is calling in

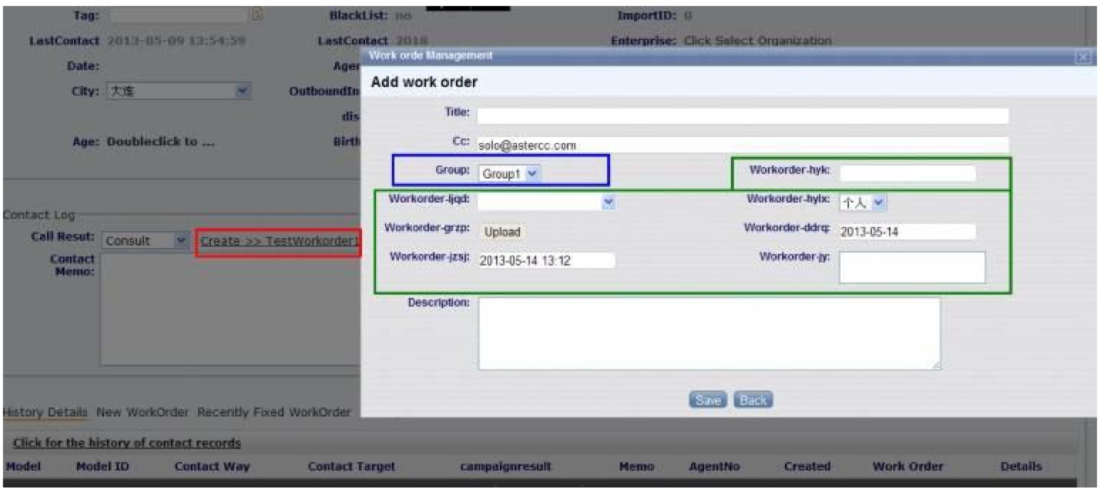
1.3Contact Log

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.

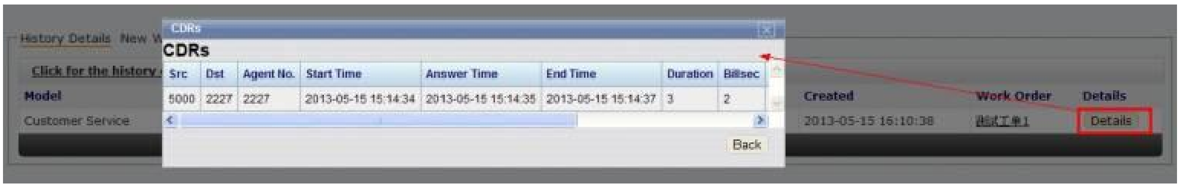
Agent group in blue means the work order has not been set for auto-transfer. The new added work order needs to pick a transfer group in the transfer range.

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.

2.1History 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.



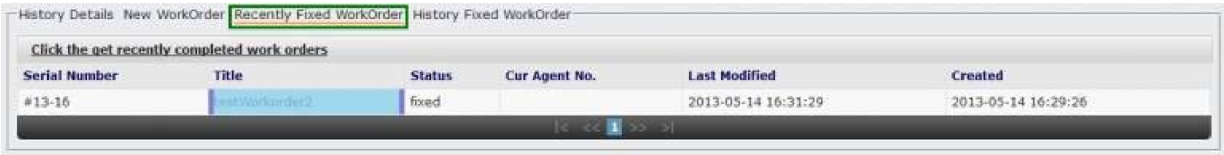
Like the picture above, click "Details" behind each record for more information.

2.2 New Work Order

Click New Work Order to see the unfinished work order under that customer.

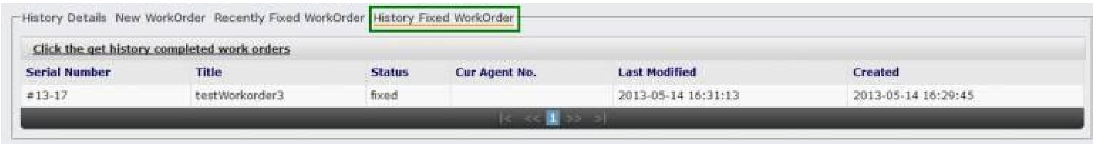
2.3Recently Fixed Work Order

Click Recently Fixed Work Order and it will list the work orders your finished recently



2.4History Fixed Work Order

Click Recently Fixed Work Order and see the finished work orders formerly.



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:

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. Finishall 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 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
3	00000000003	Customerservice	[redacted]	beer	1	72.00	72.00	0.00	72.00	2018	2013-05-15 10:56:57
4	00000000003	Customerservice	[redacted]	牛奶	1	42.00	42.00	0.00	42.00	2018	2013-05-15 10:56:57
2	00000000002	Customerservice	[redacted]	牛奶	1	42.00	42.00	0.00	42.00	2018	2013-05-15 10:45:49

|< << 1 >> >|

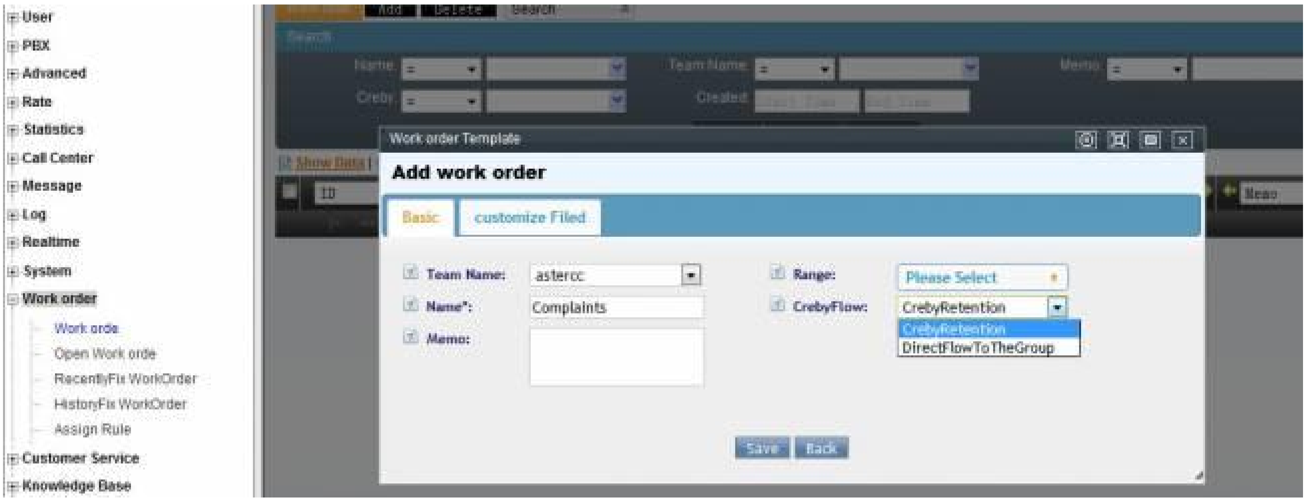
The picture above shows the recent purchase record of that customer:

- 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.

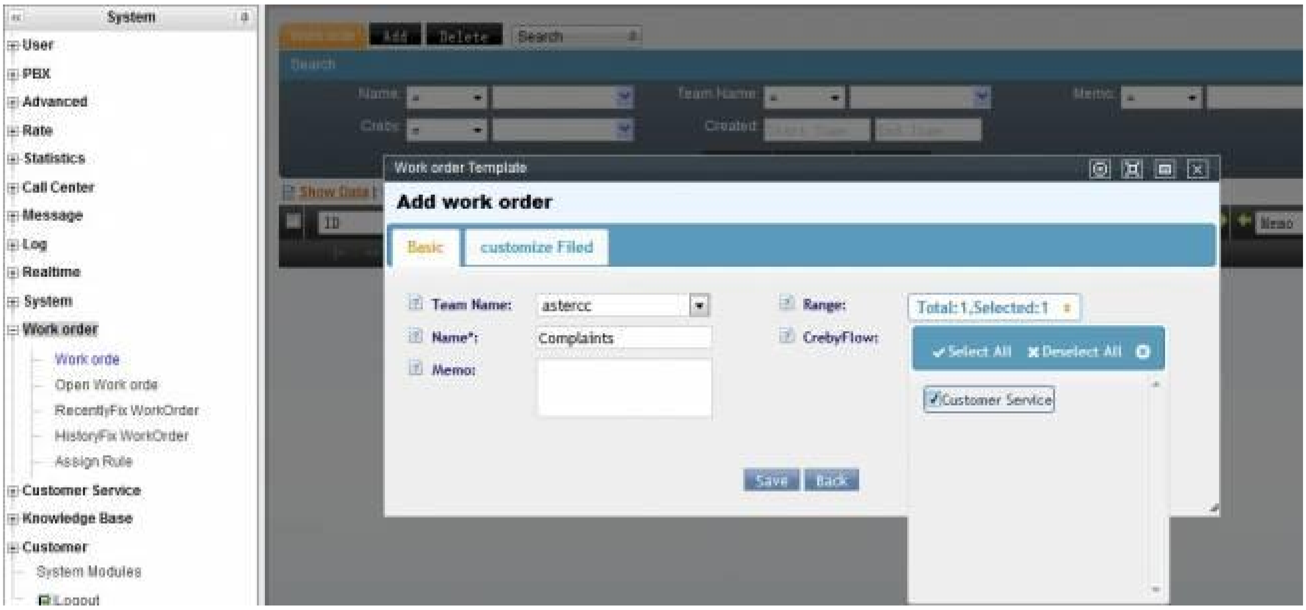
26.5 how to use work order in customer service module

Create a kind of work order

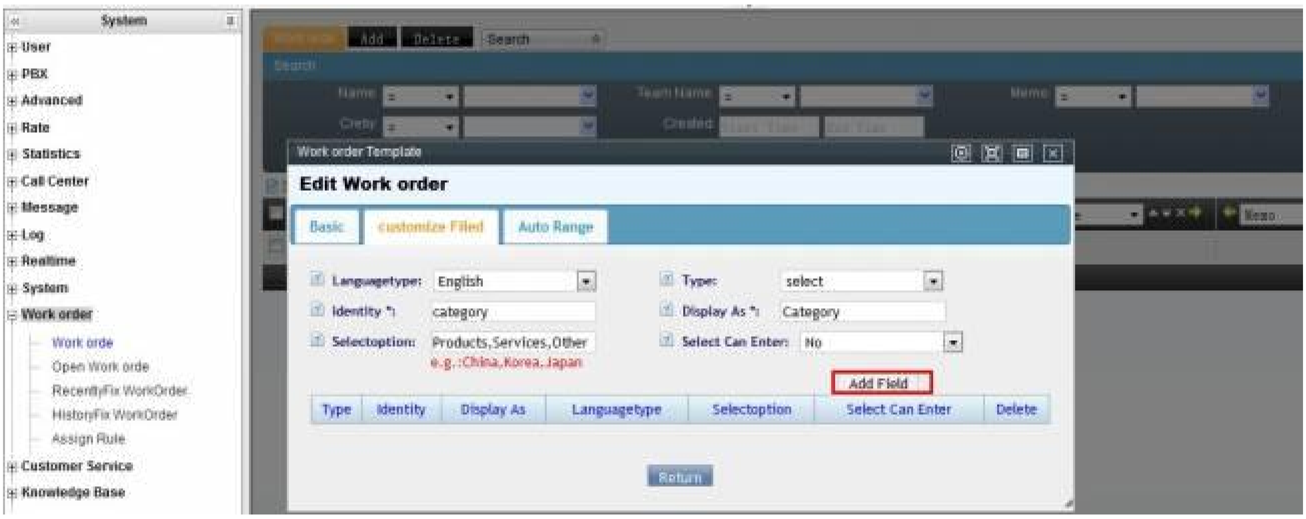
- go to [Work order] → [Work order], click [Add], we can add many kinds of work order as required
- We can config where the new work order should go, including CrebyRetention and DirectFlow to group
  - CrebyRetention: the work order will be assiged to the agent who create it.
  - DirectFlow to group: the work order will stay in unassigned status, until the agent group assign it to some agent



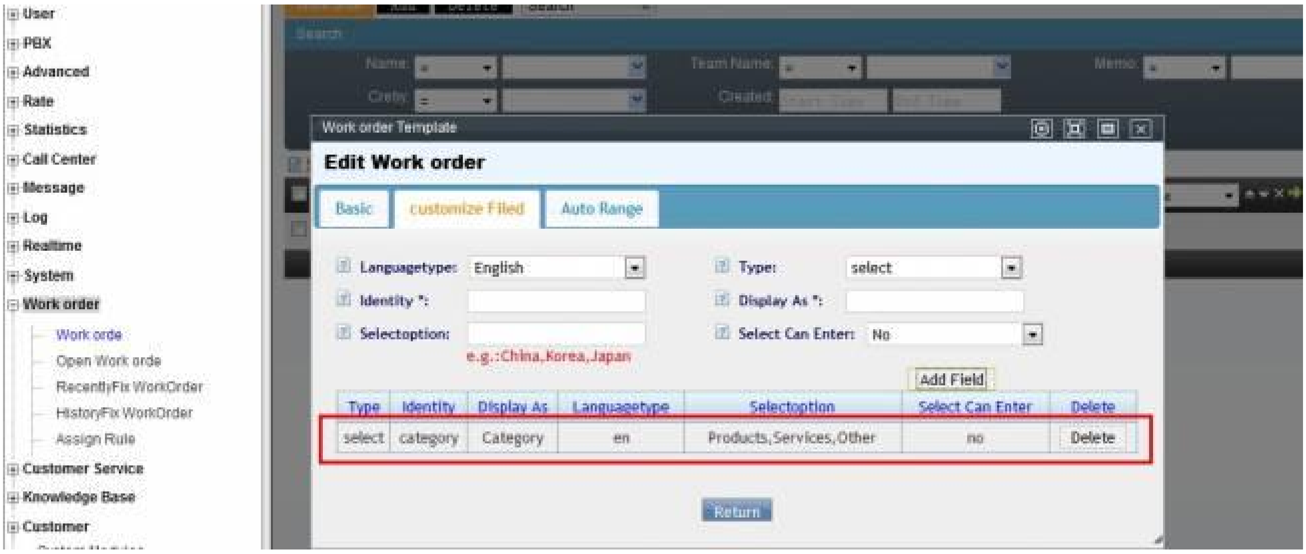
- We need select the range to determine which groups the work order could go



- Go to “customize Filed”, we could add any fields we need in this work order

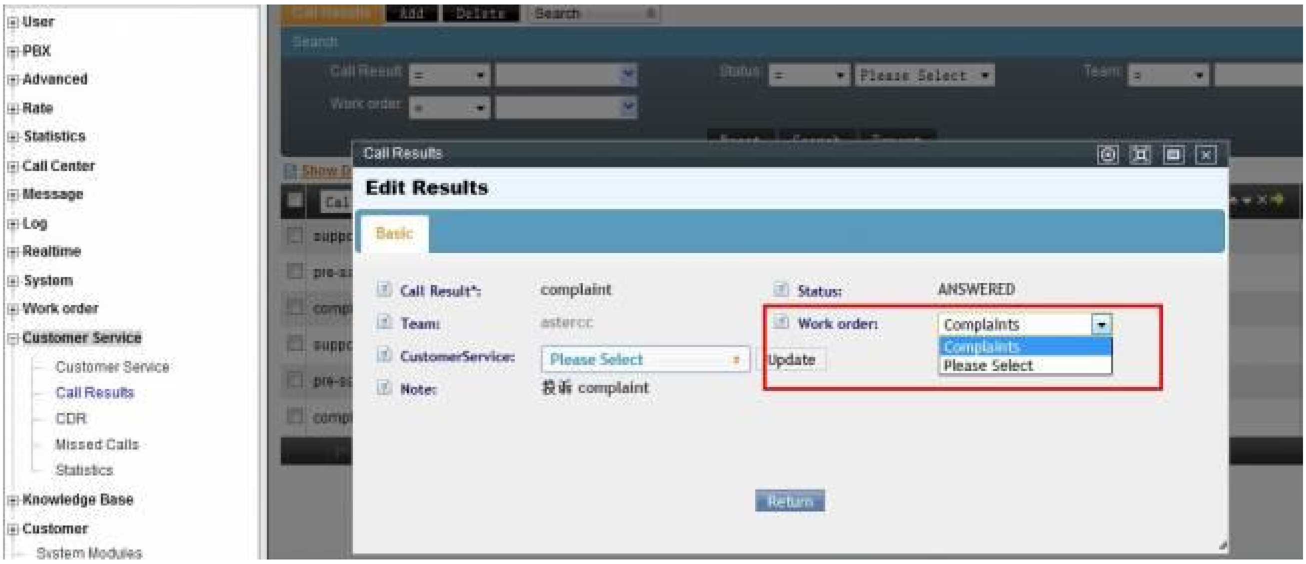


- Click [Add Field], we can read the customized fields list



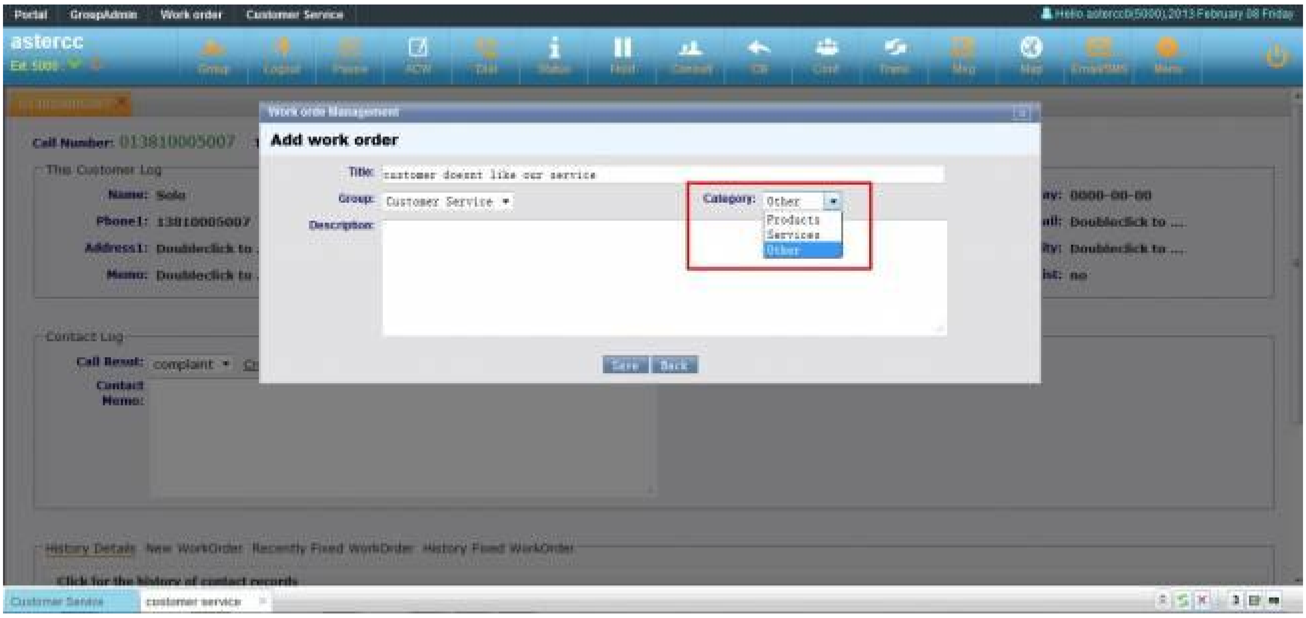
Binding Work Order

- 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

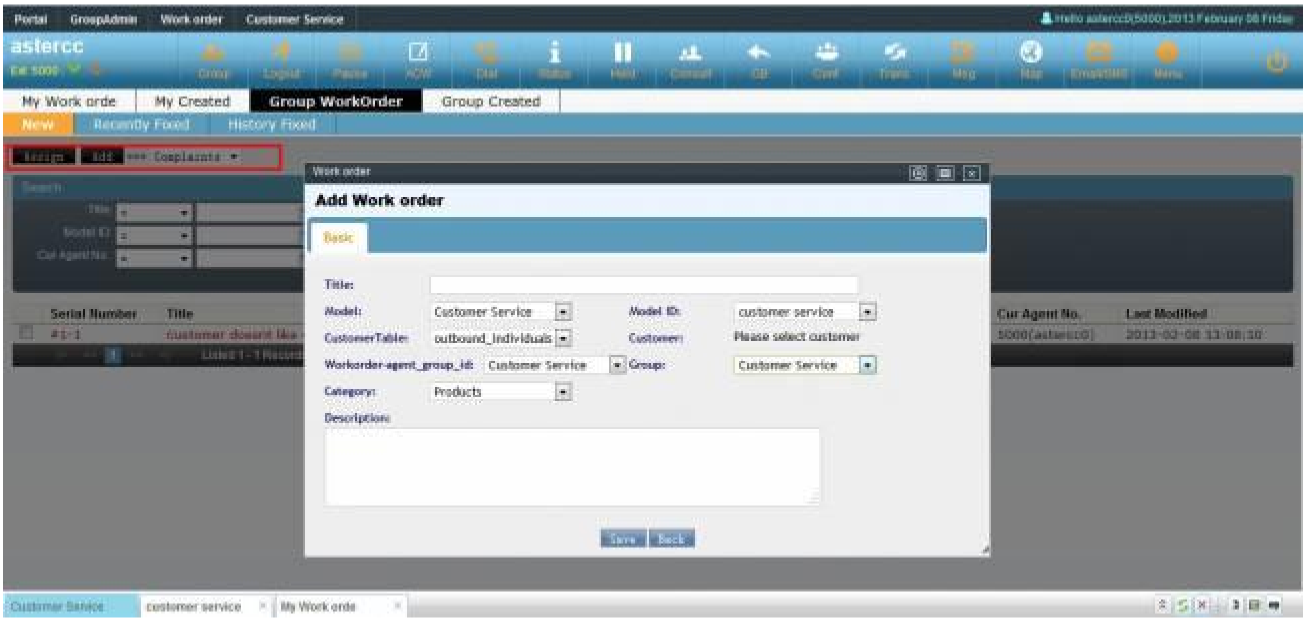


Create a work order

- Agent could create work order from customer service popup page
- select the call result, it will display the link to create the work order

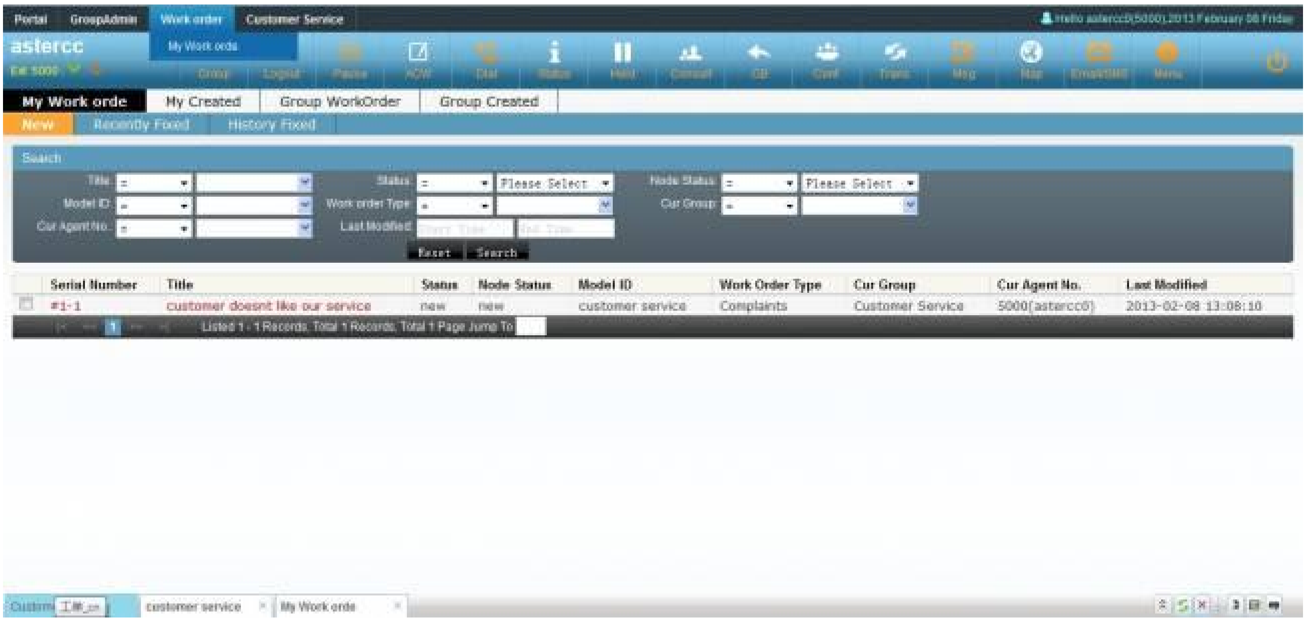


- As agent group, he can create a work order and assign them to agents

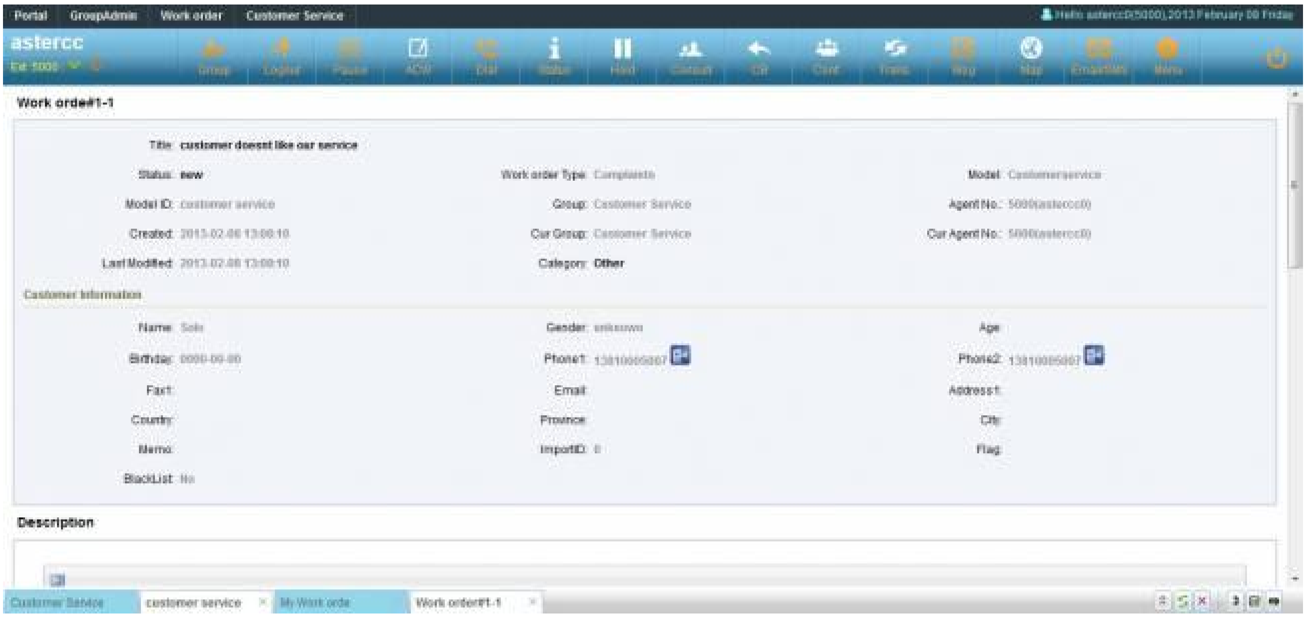


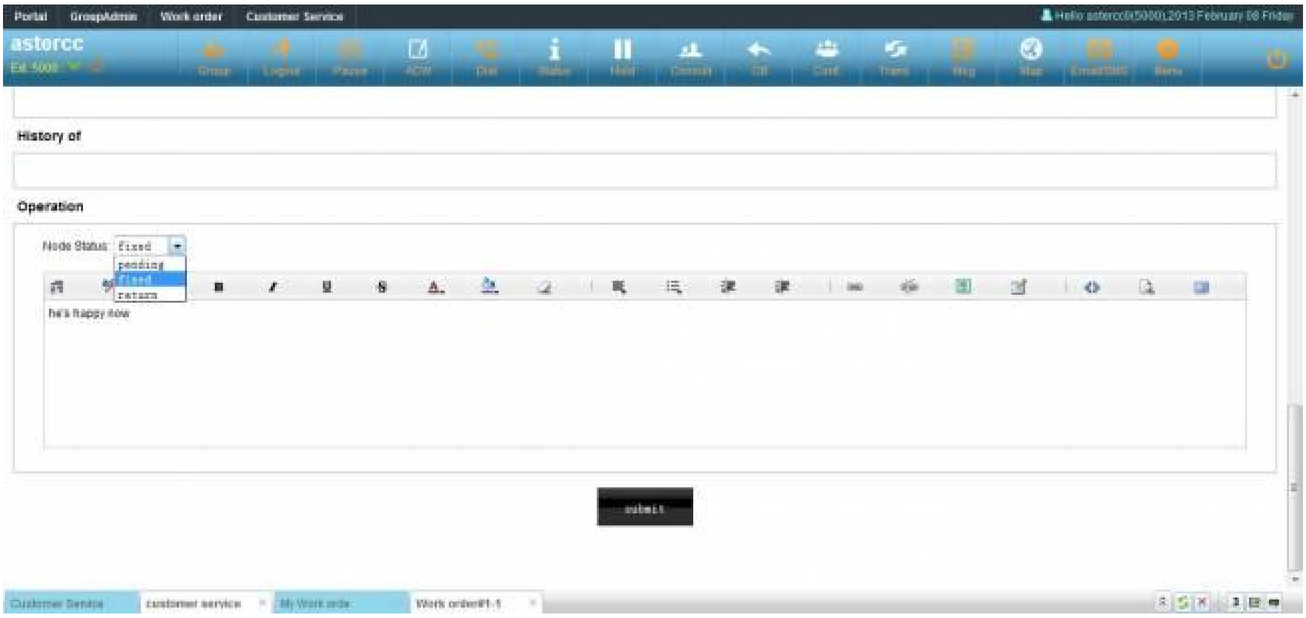
Work Order Flow

- Agent could see his unfinished work order list in [My Work Order] → [New]

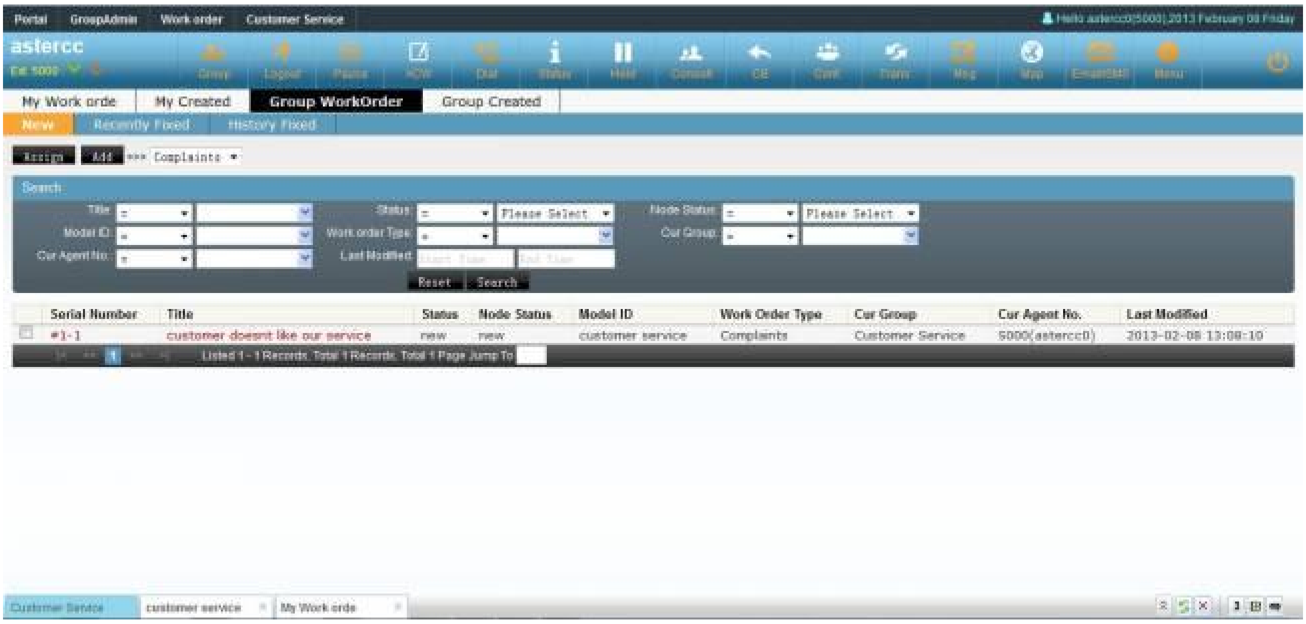


- Double click the work order it will display the detail

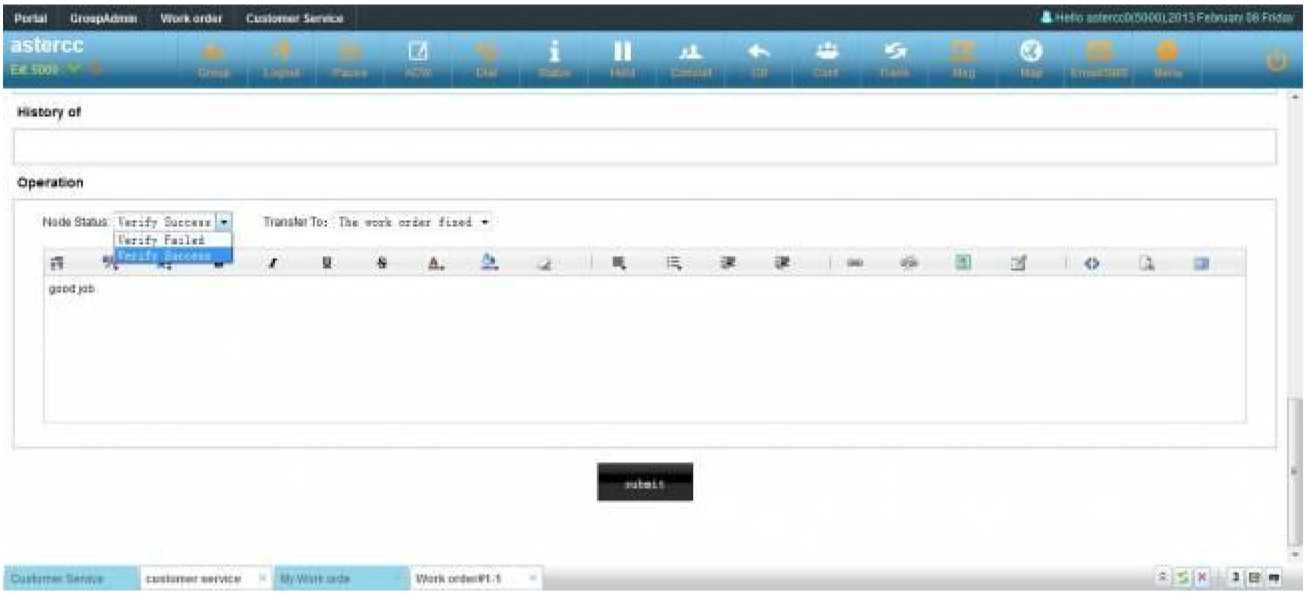




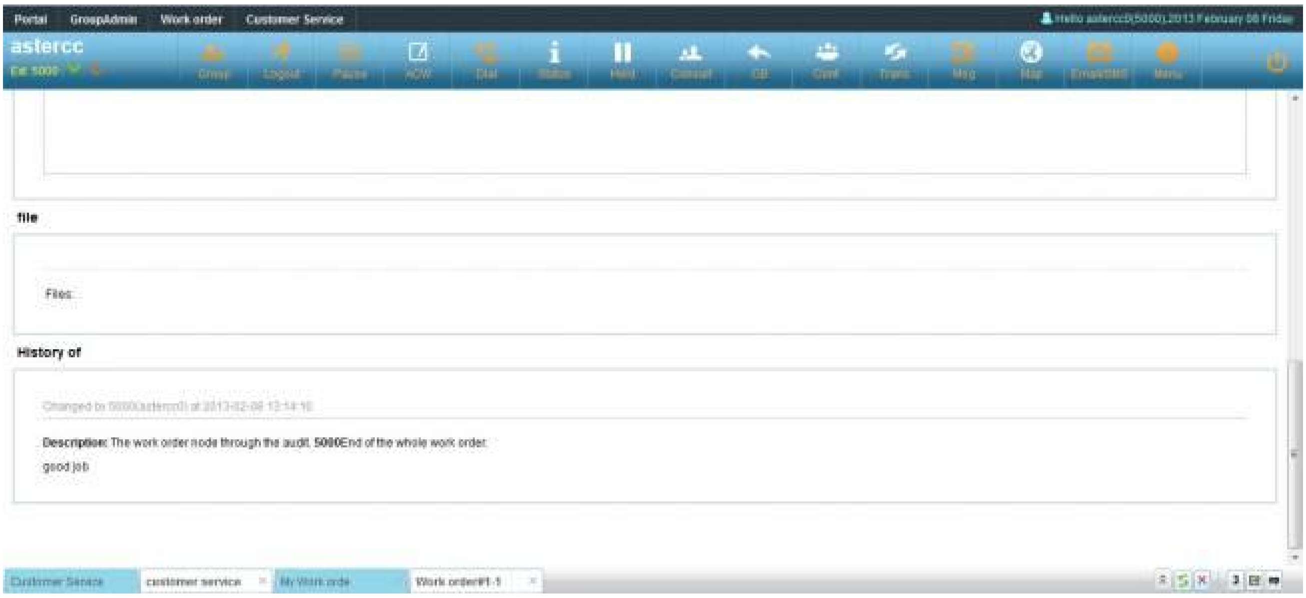
- When the work order is fixed, agent could update status of the work order
- When agent job is done, the work order will wait to get verify, group admin could read these work order under new tab



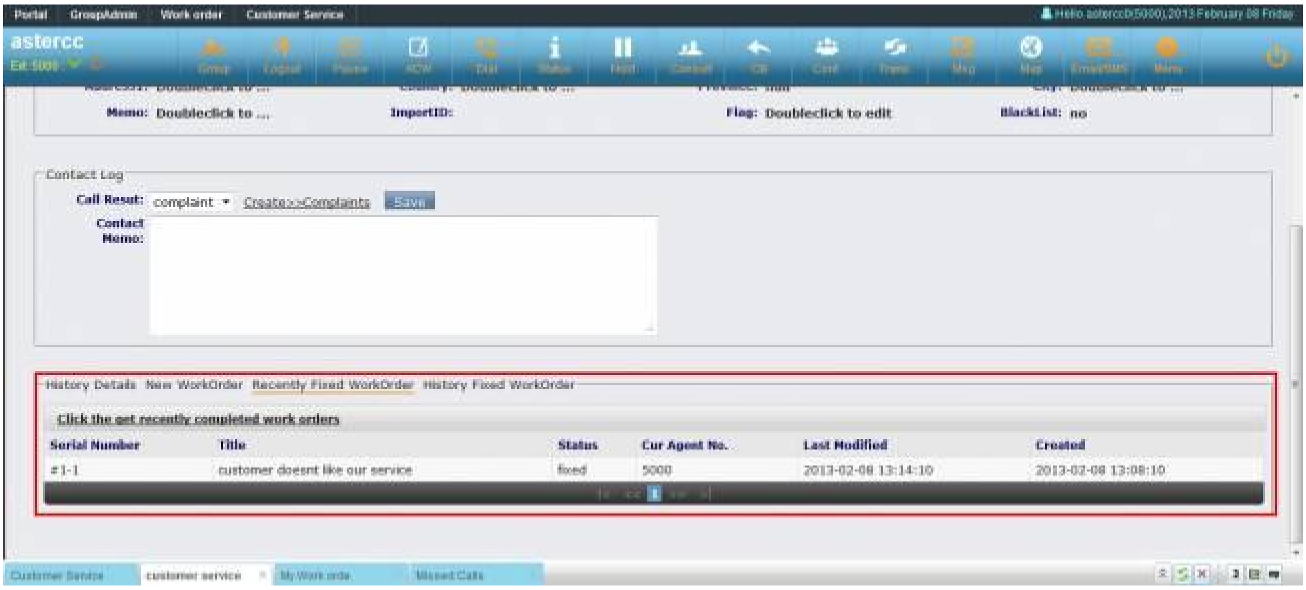
- Group admin could set if a work order is done, he can choose "Verify Failed", return the work order to agent, or "Verify Success", close the work order or send it to another group



- 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



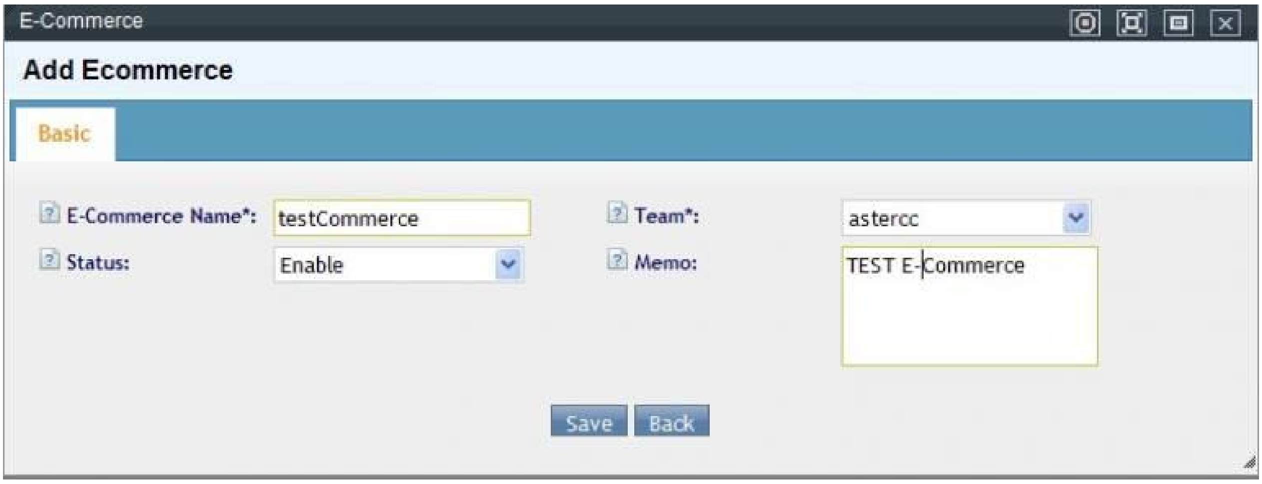
Missed Calls

- 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

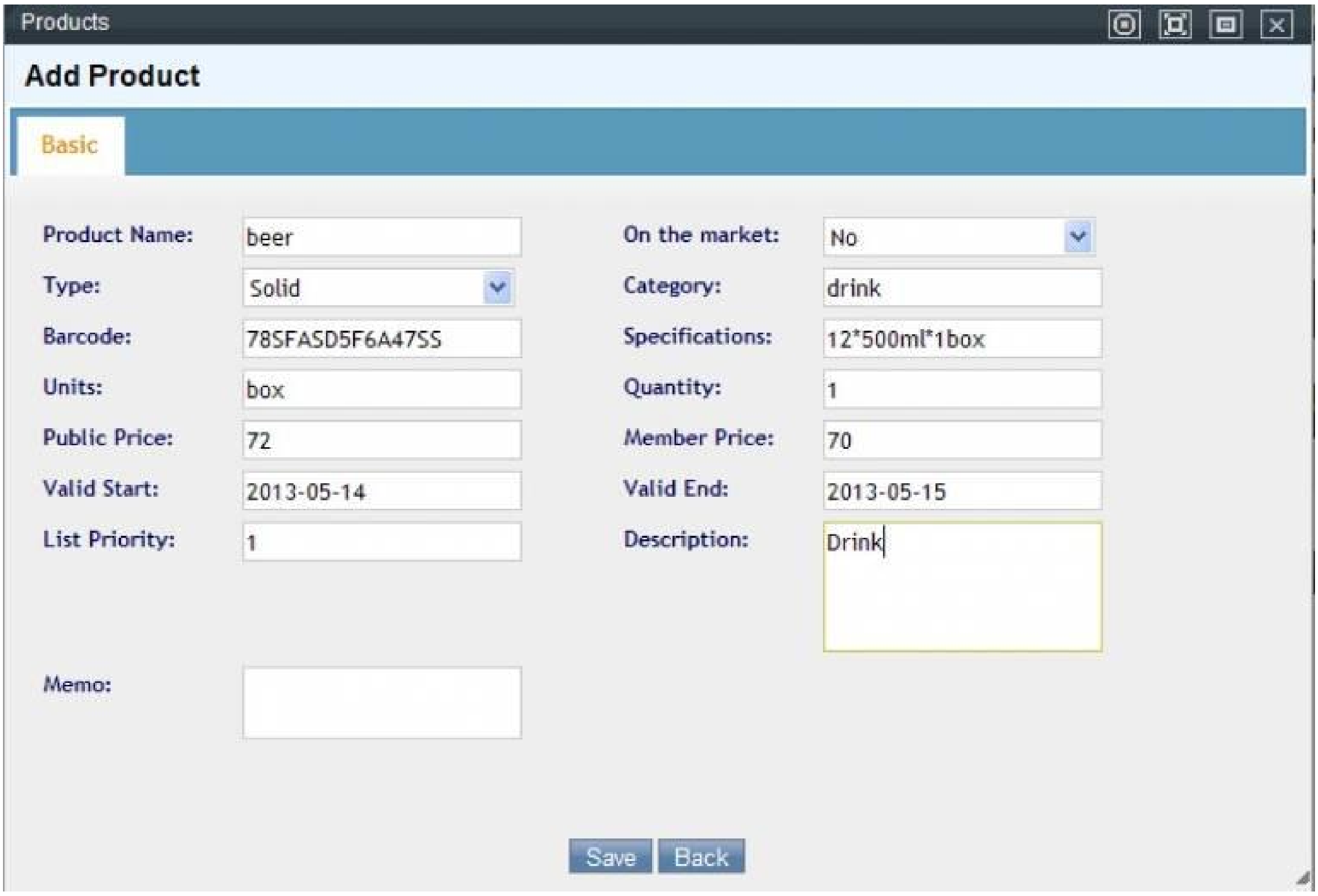
Create E-Commerce

- go to [E-Commerce] → [E-Commerce], click [Add].We can create different type of E-Commerce by need;



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



As shown picture above,add product for testCommerce

The parameter on the add page,please refer to product

If you need to add more,pleas 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

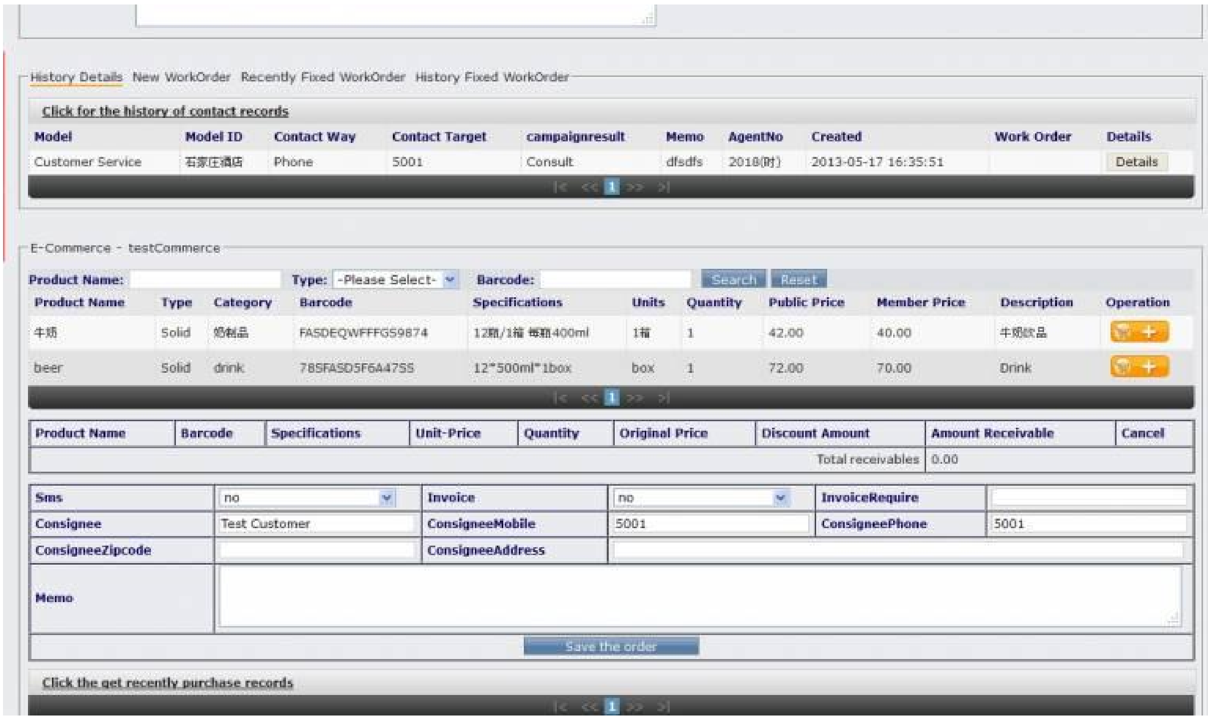
After binded the E-Commerce,so you can see the E-Commerce part on the customer Pop page with this E-Commerce

Customer Popup Page On The Agent Work Page

Use agent's account to login the system,redirect to the agent work page,like this

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



As above,you can see the E-Commerce on the custoemr popup page.The agent can sale the product to customer and order it

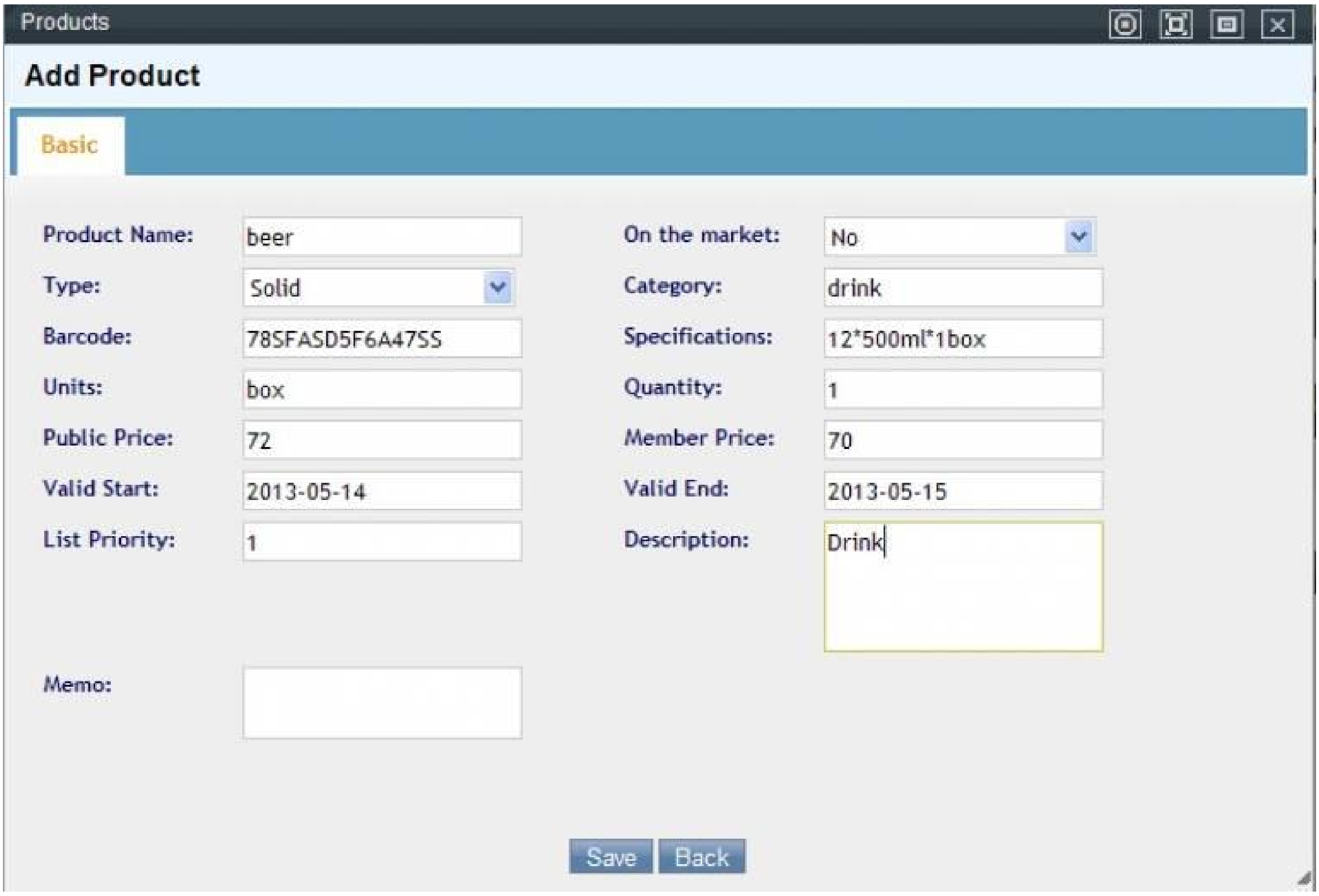
26.7 How to Config E-Commerce In A Campaign

Create E-Commerce

- go to [E-Commerce] → [E-Commerce], click [Add].We can create different type of E-Commerce by need;

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



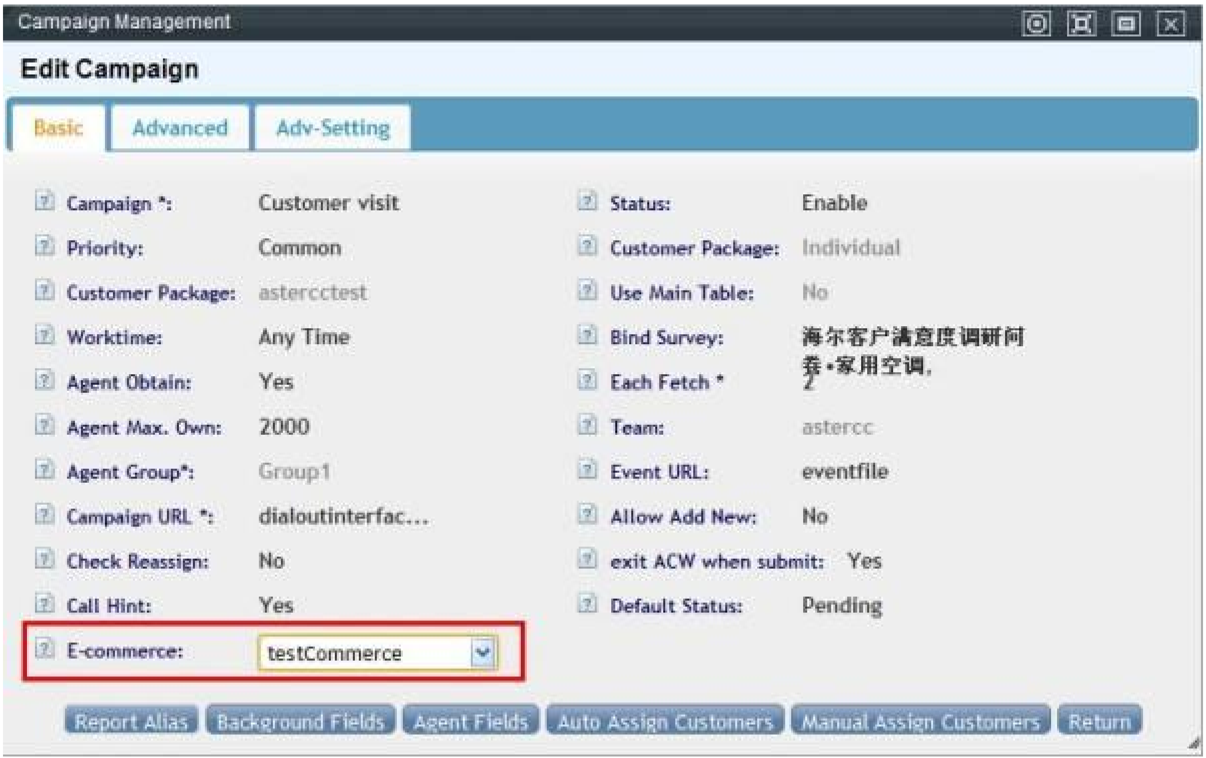
As shown picture above,add product for testCommerce

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



After binded the E-Commerce,so you can see the E-Commerce part on the customer Pop page with this E-Commerce

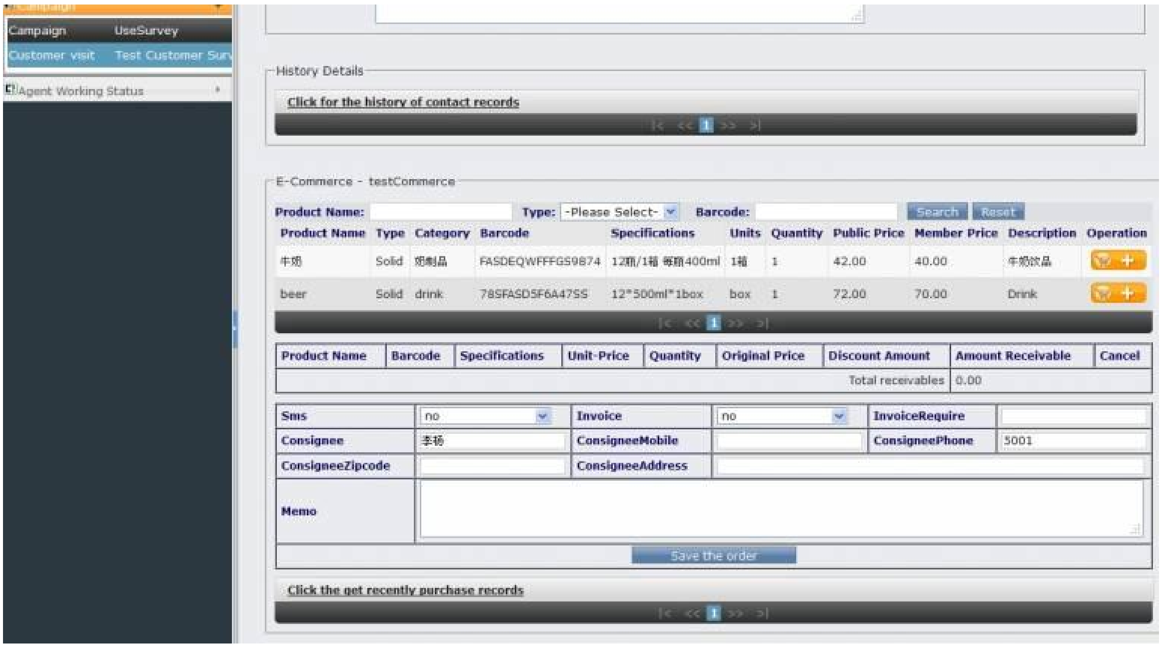
Customer Popup Page On The Agent Work Page

Use agent's account to login the system,redirect to the agent work page,like this

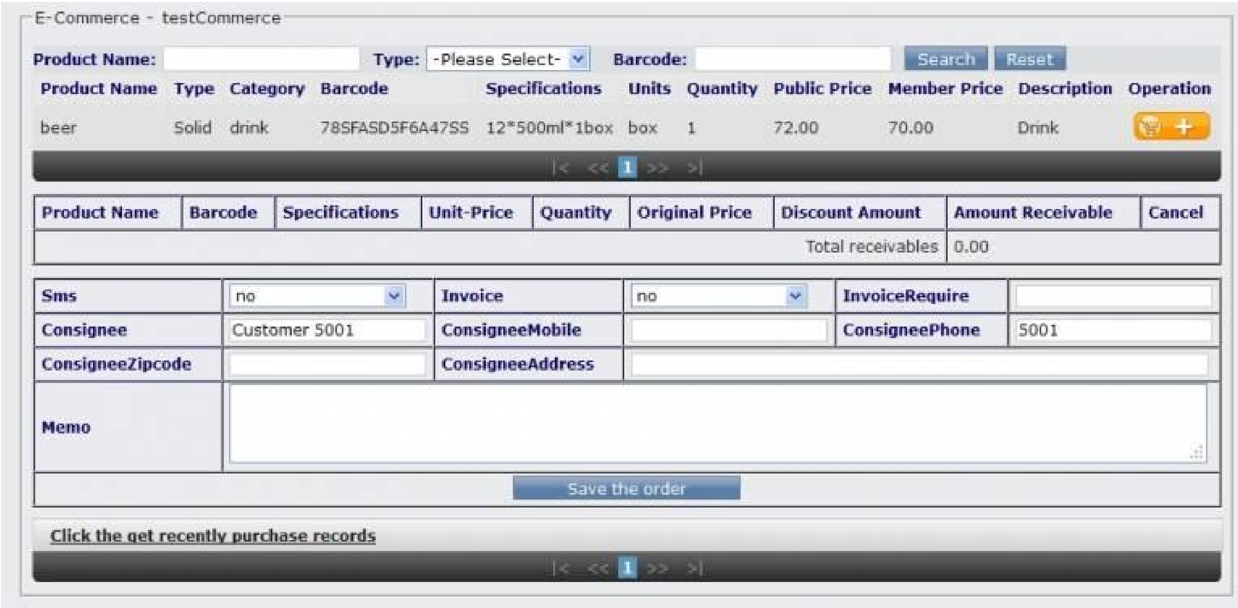
When click the customer data in the page list or the customer dialin,the agent will popup the customer,like

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



Explain the E-Commerce on the customer popup page:



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 prodcut 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'name,`ConsigneeMobile` will be automatically entered the popup customer'phone1 and `ConsigneePhone` will be automatically entered the popup customer'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 pruchase records,Default is not loading the data,need to click `Click the get recently purchase records` link to get data.The recent pruchase record will be shown in the data list.

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

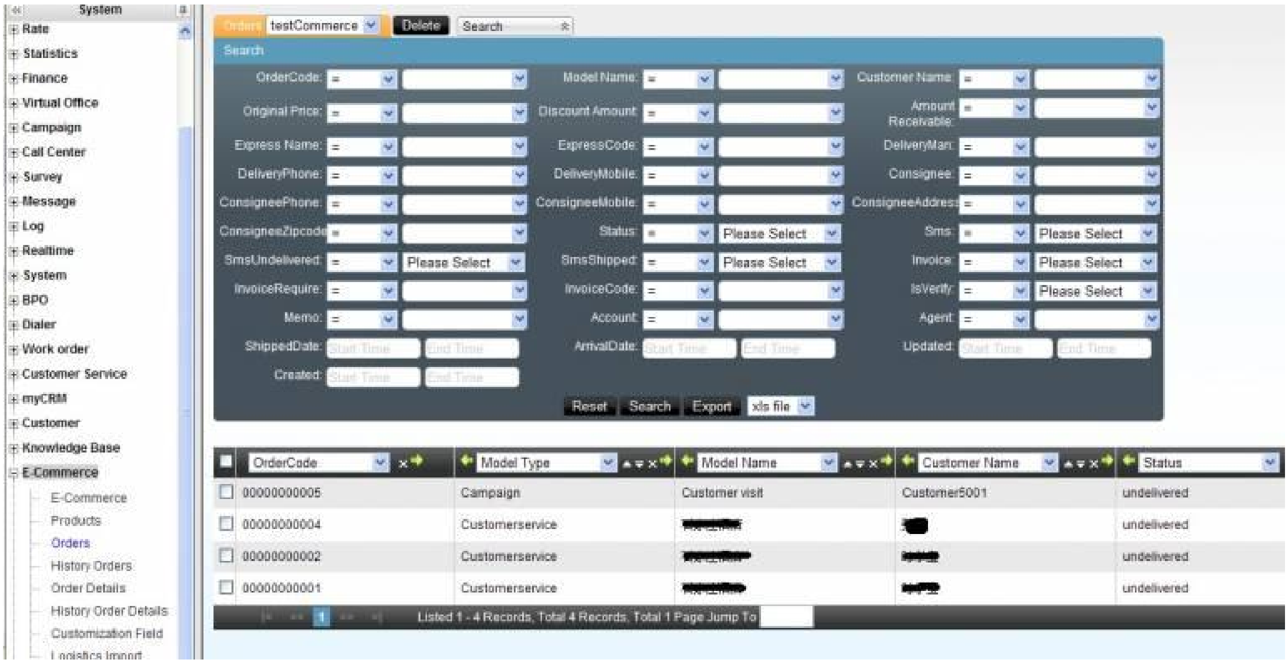
As above picture,add one prodcut for testCommerce

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

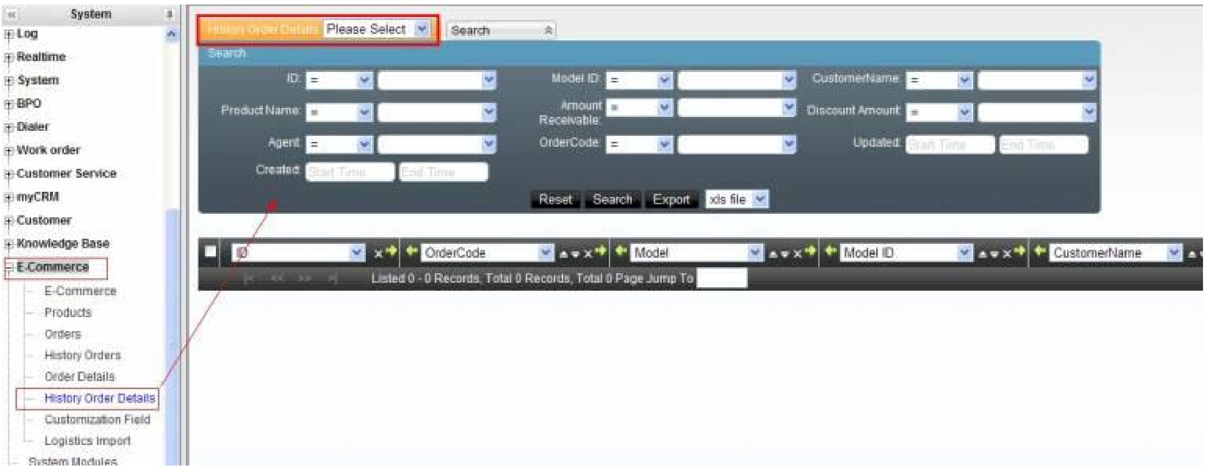
choose the select in the red box on the top,and choose `testCommerce`,like this



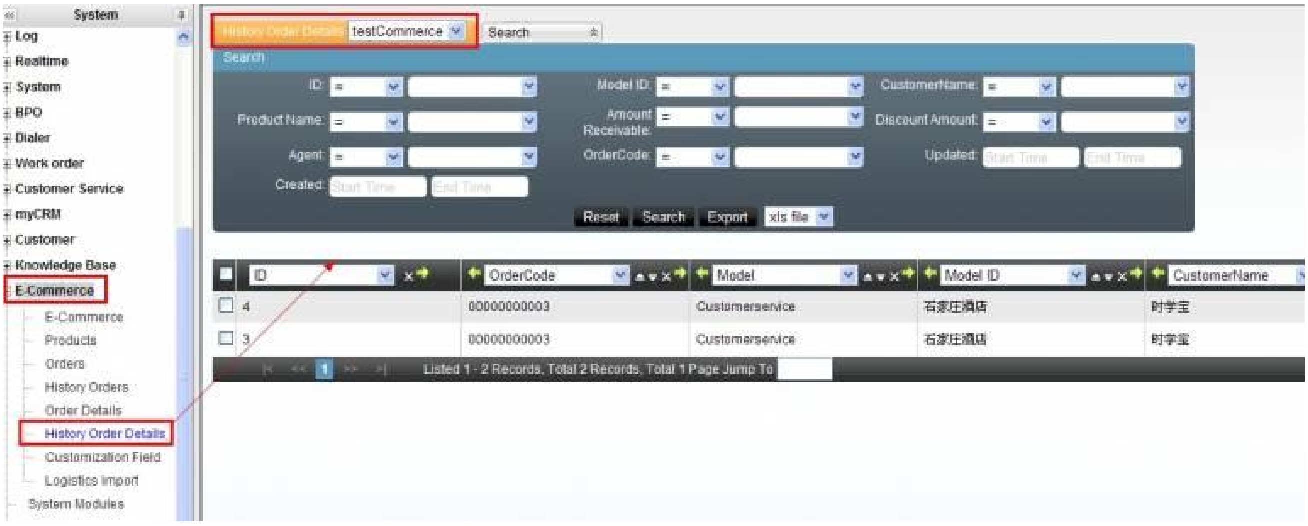
As above,you can see the order message of the customer `Customer5001`(00000000005)

> 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:



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

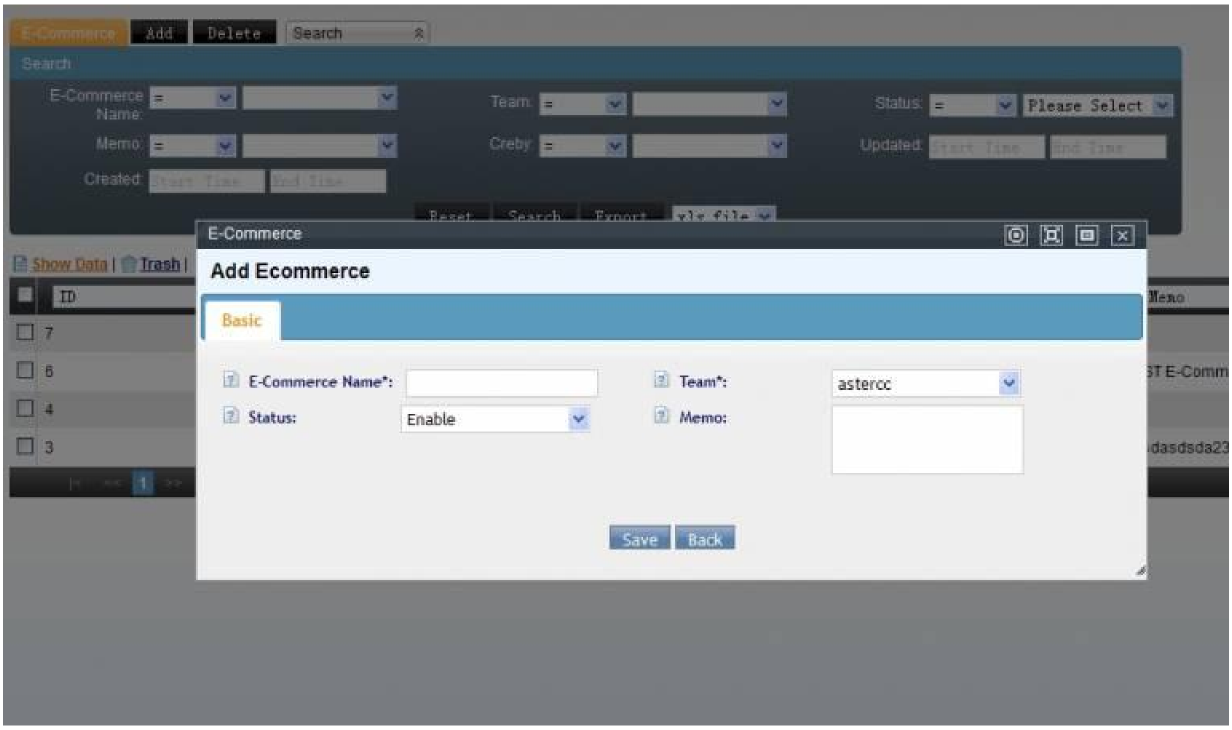
the system can deal with the order and purchase records which created before the premeter value By this premeter to `History Orders` and `History Order Details` by this premeter

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

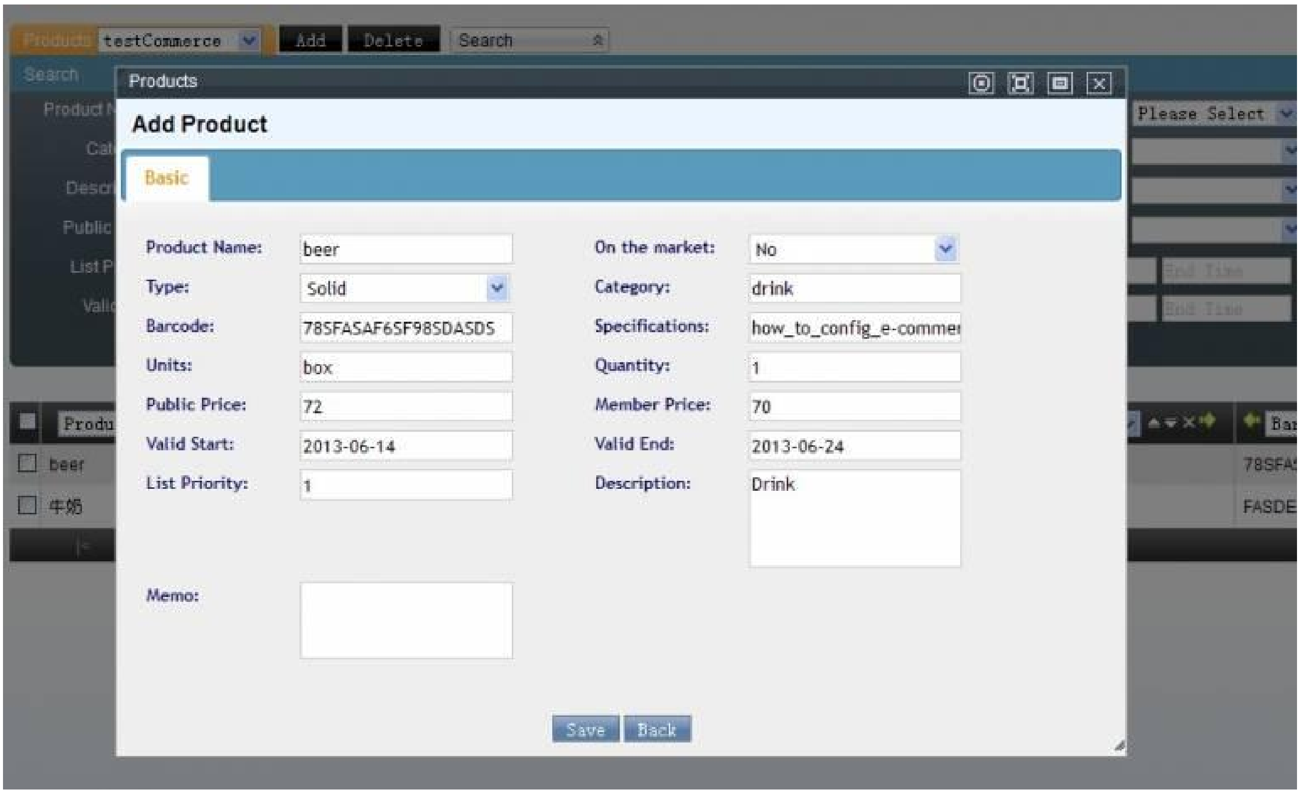
Create E-Commerce

- 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 leftmenu,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



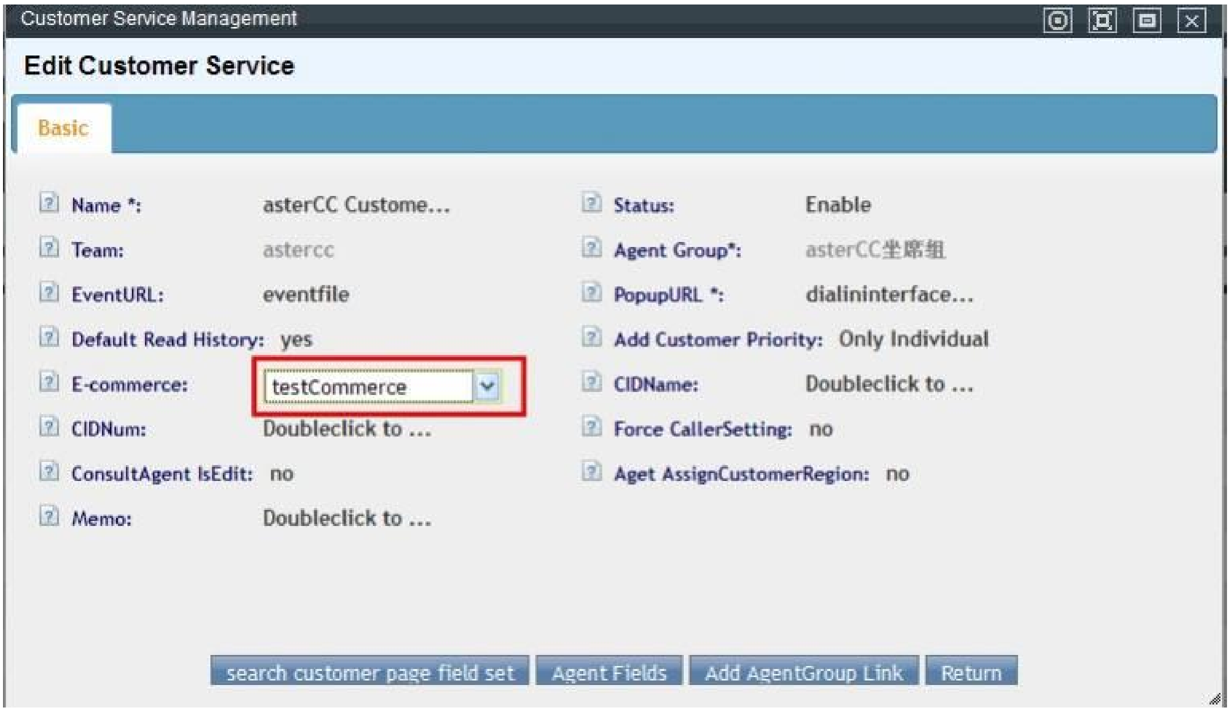
As above,add one product for `testCommerce`

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

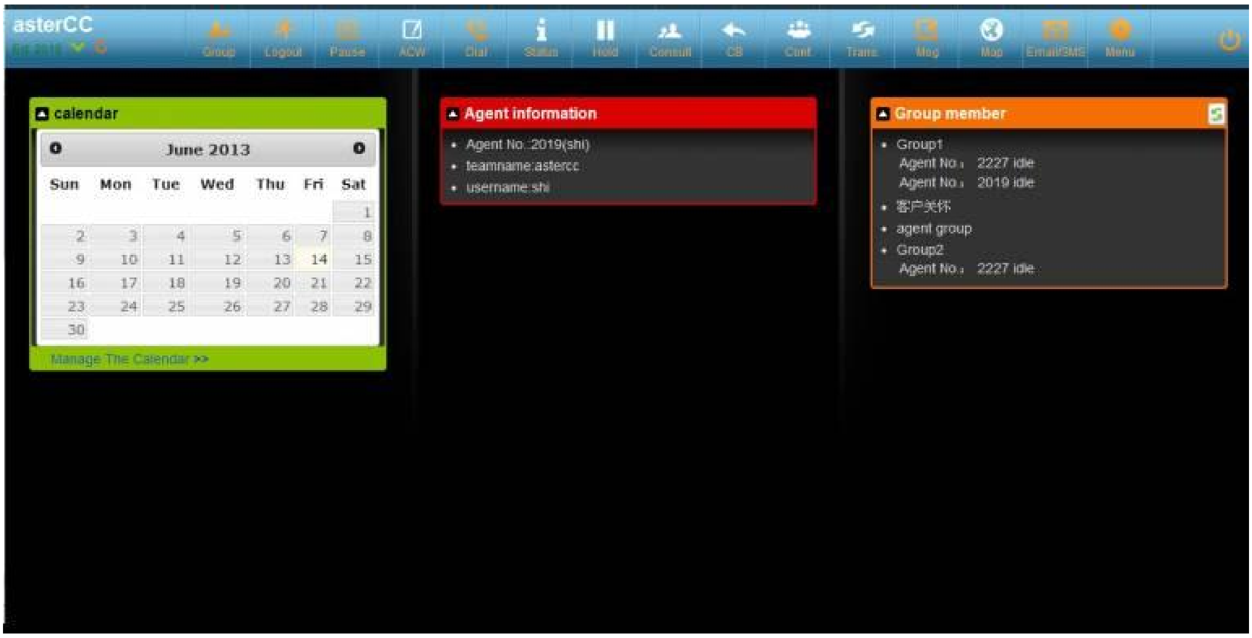
On the add page or edit page,both can bind the E-Commerce for the Customer Service



After binded the E-Commerce,can see the binded E-Commerce on the customer popup page

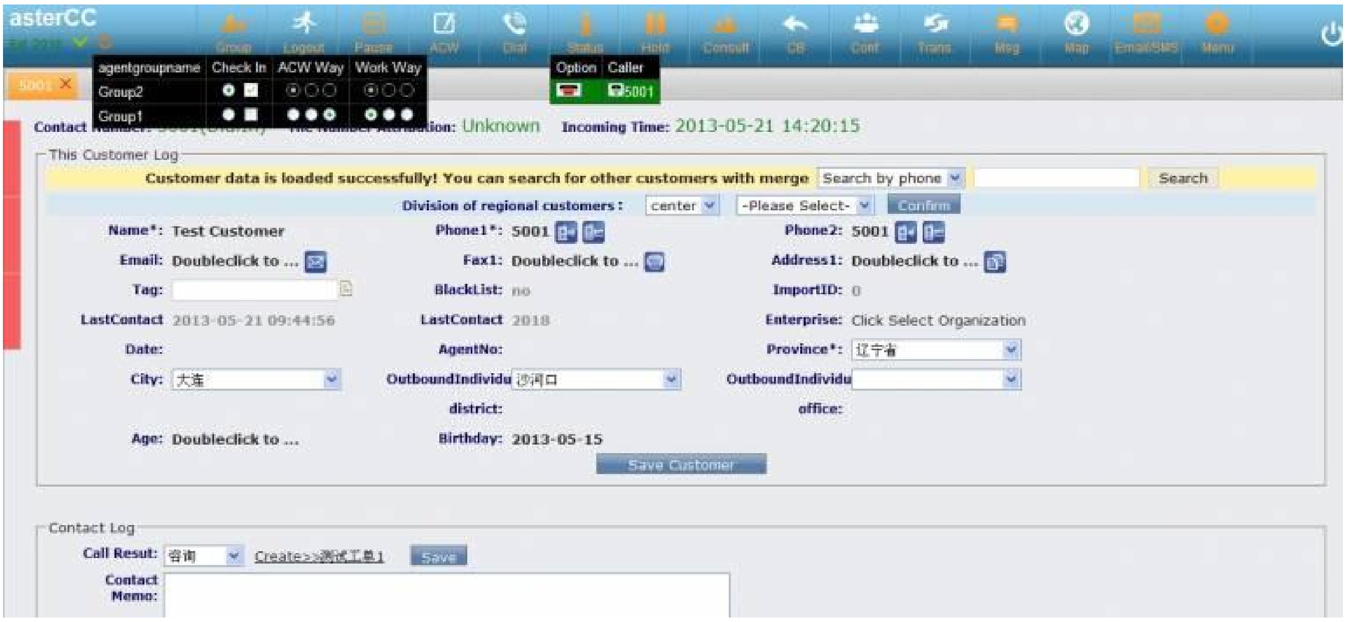
E-Commerce of the customer popup page on Agent Work Portal Page

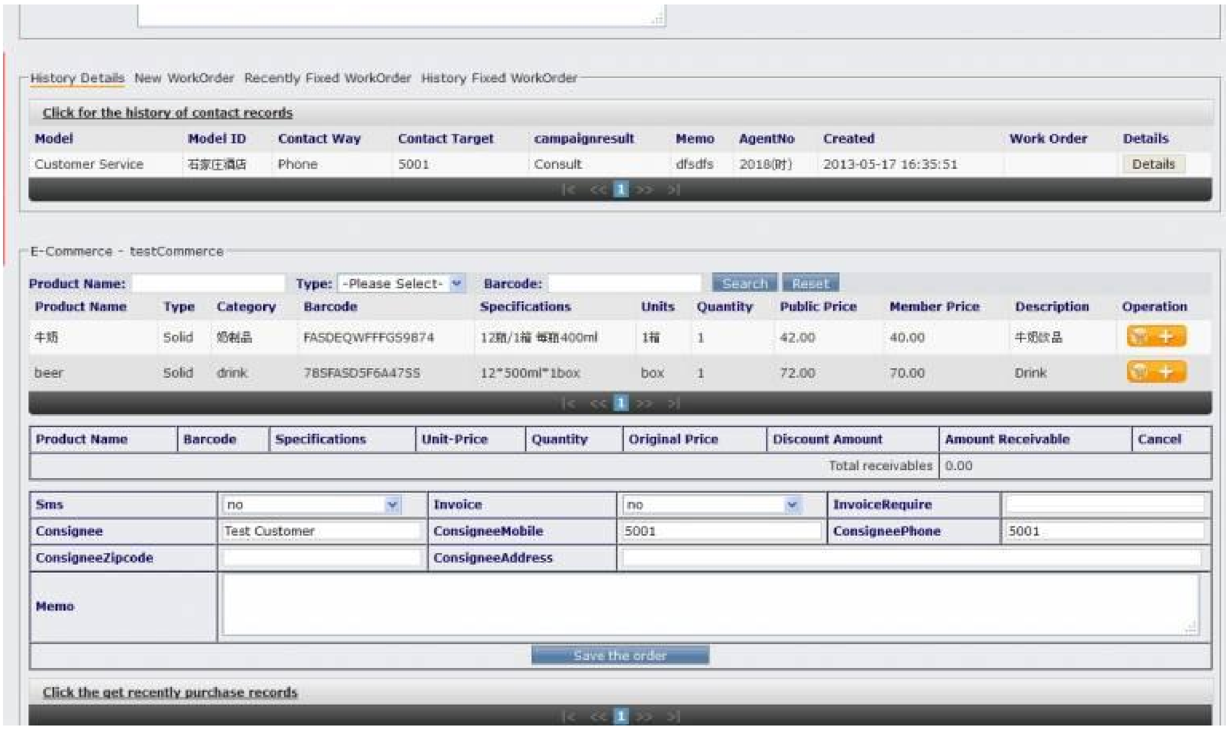
login the system by agent,login the agentgroup to work,like this:



The customer will popup when the call dialin

The content is long on the customer popup page,so split the page into two page to show.you can see the E-Commerce by scroll bar



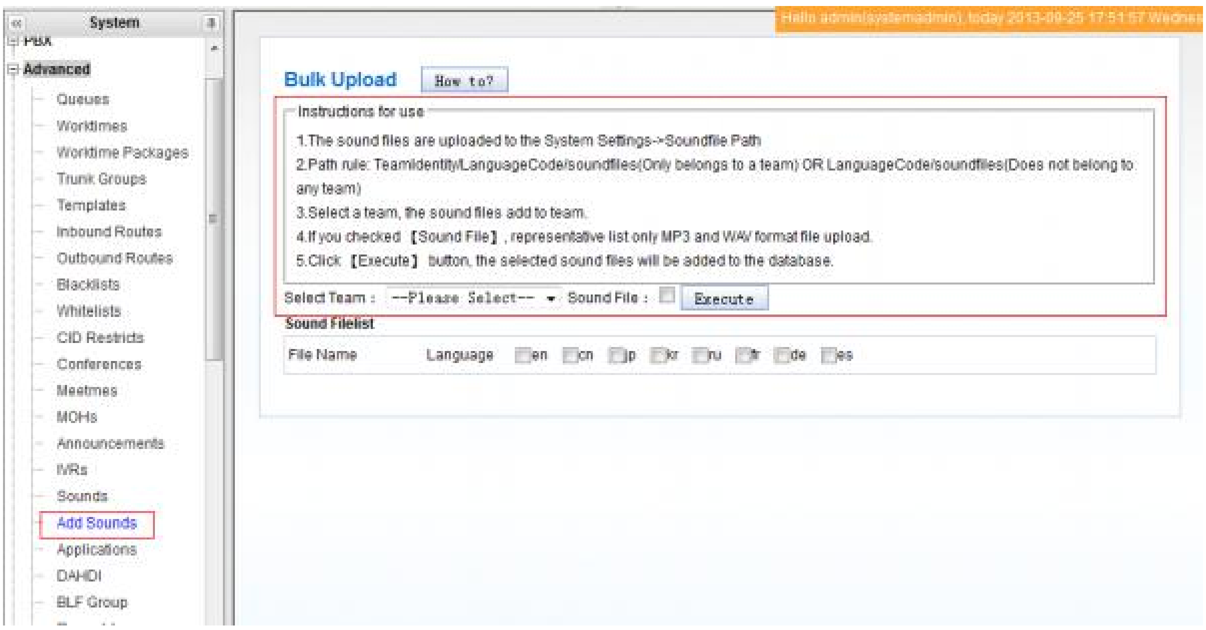


As above,can see the binded E-Commerce on the customer popup page.So the agent can sale the products and create order for customer.

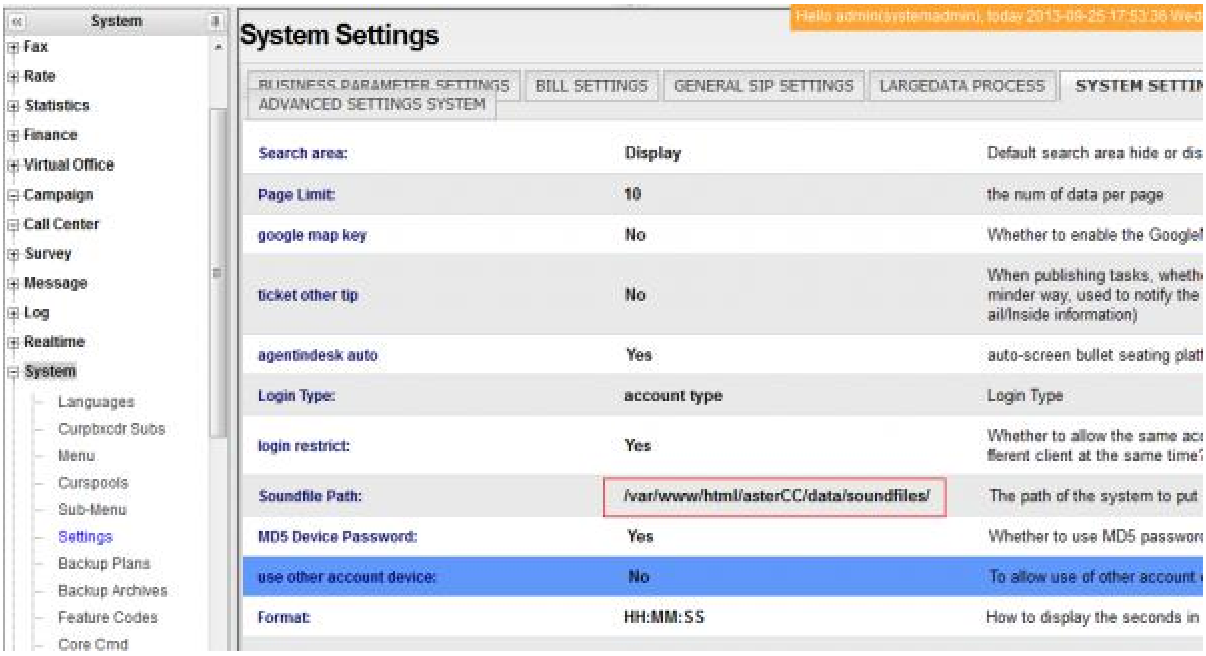
26.9 how to configure a voice survey with predictive dialer

1)Mass upload sound files

login to system，go to Add Sounds page，according to introduction：

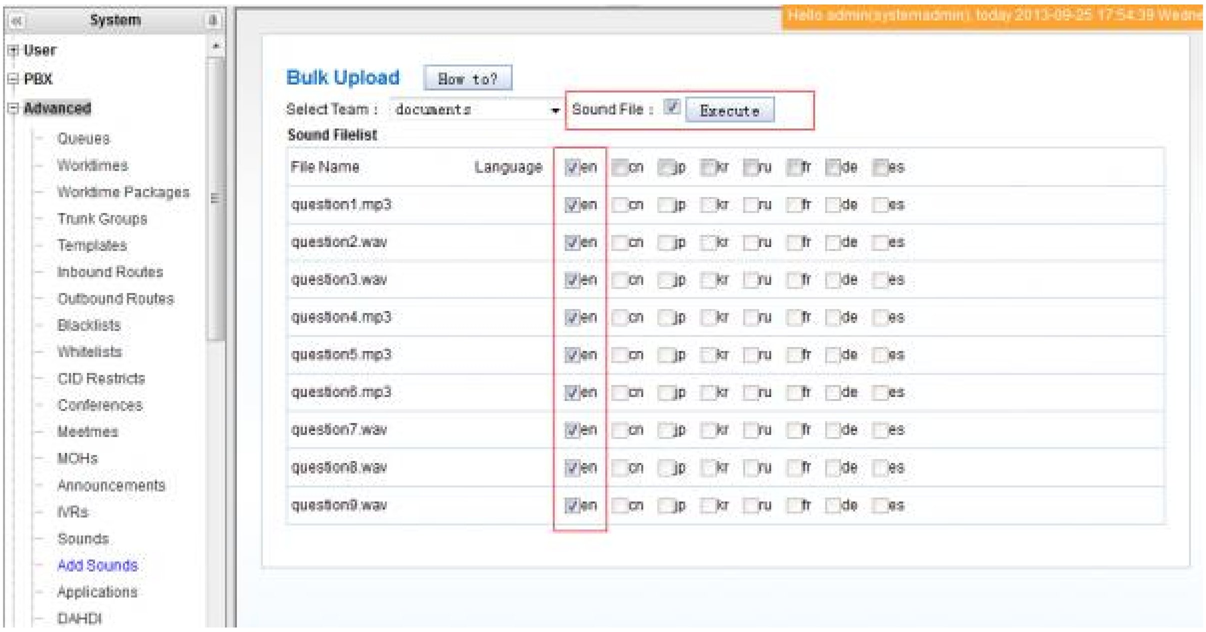


upload sound files to Soundfile Path that set in system settings page with ftp or sftp.

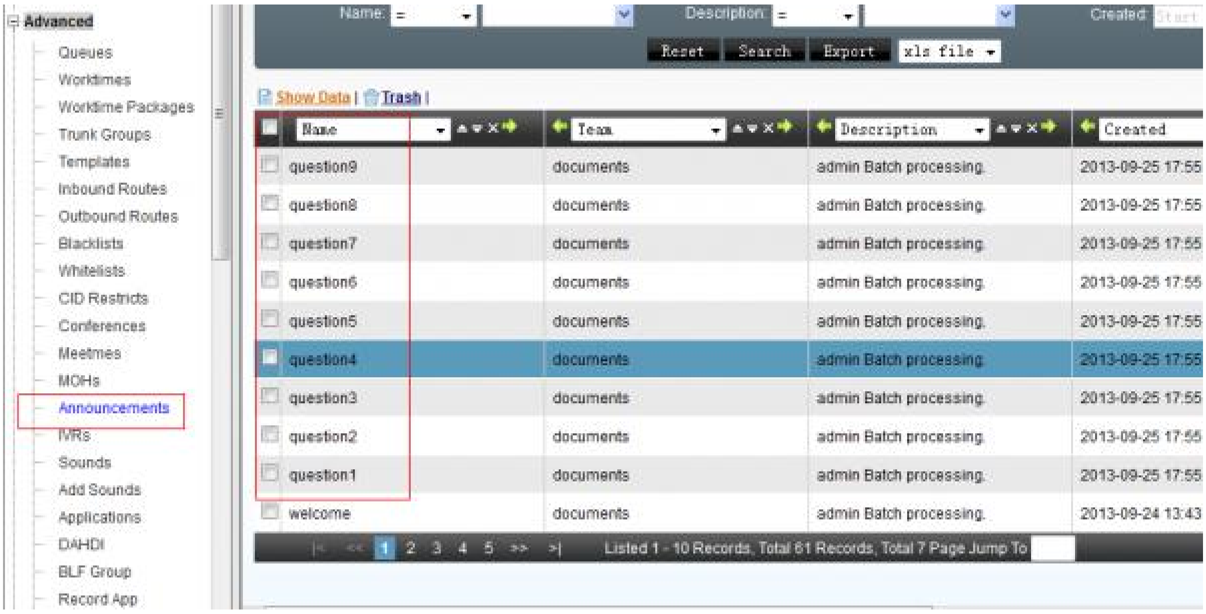


the dafault Soundfile Path is "/var/www/html/asterCC/data/soundfiles/" , you should create dirctory teamidentity/languagecode under this path. like this("document" is the teamidentity): /var/www/html/asterCC/data/soundfiles/document/cn

click Execute button to upload



View uploaded soundfiles in Advanced/Announcements

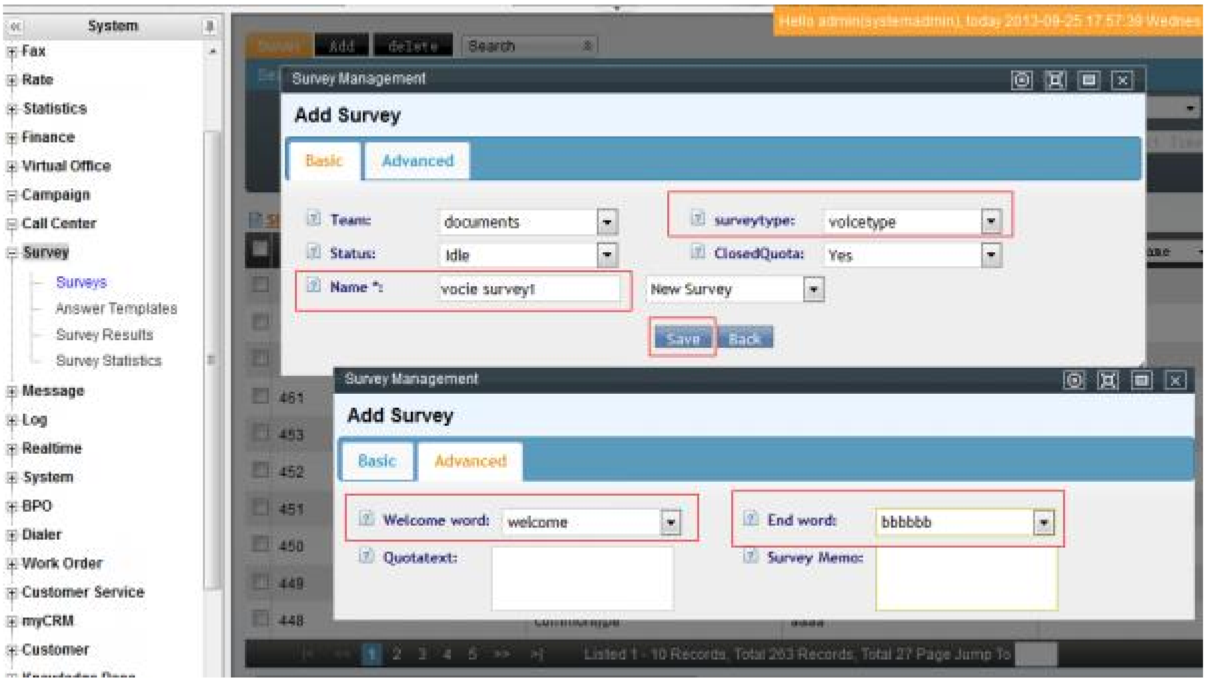


2)Add a Survey

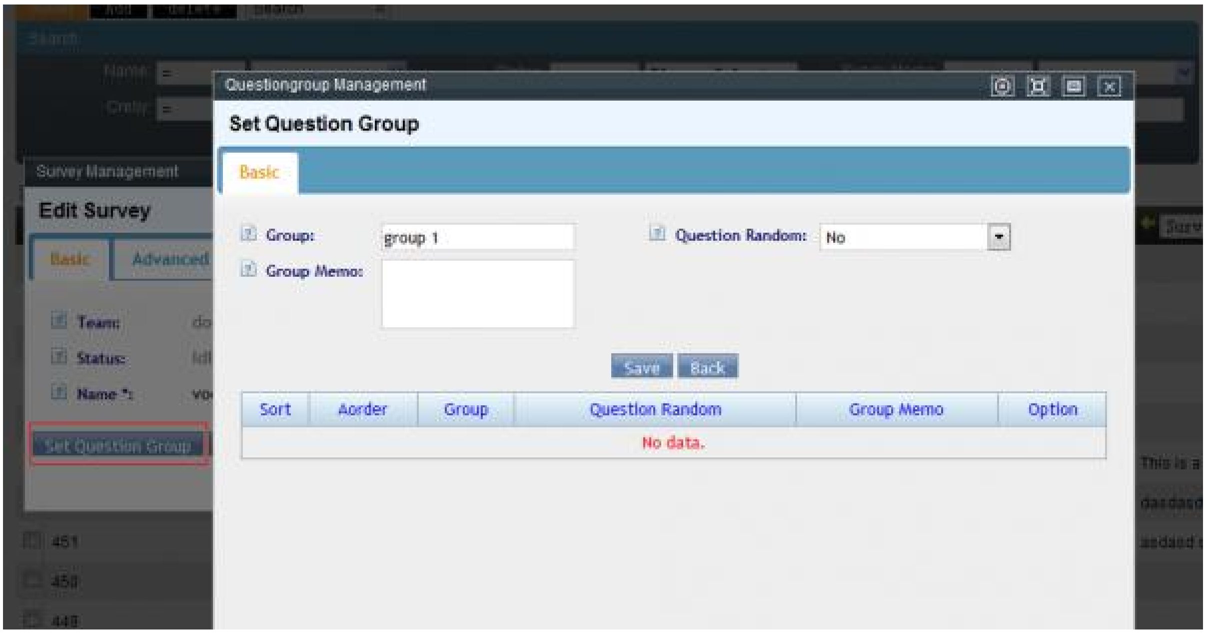
When you upload all your voice files, go to Survey → Surveys, to add a new Survey

Here you need name the survey, in surveytype, select "voicetype" then go to Advanced, select the welcome announcement and end announcement in the survey.

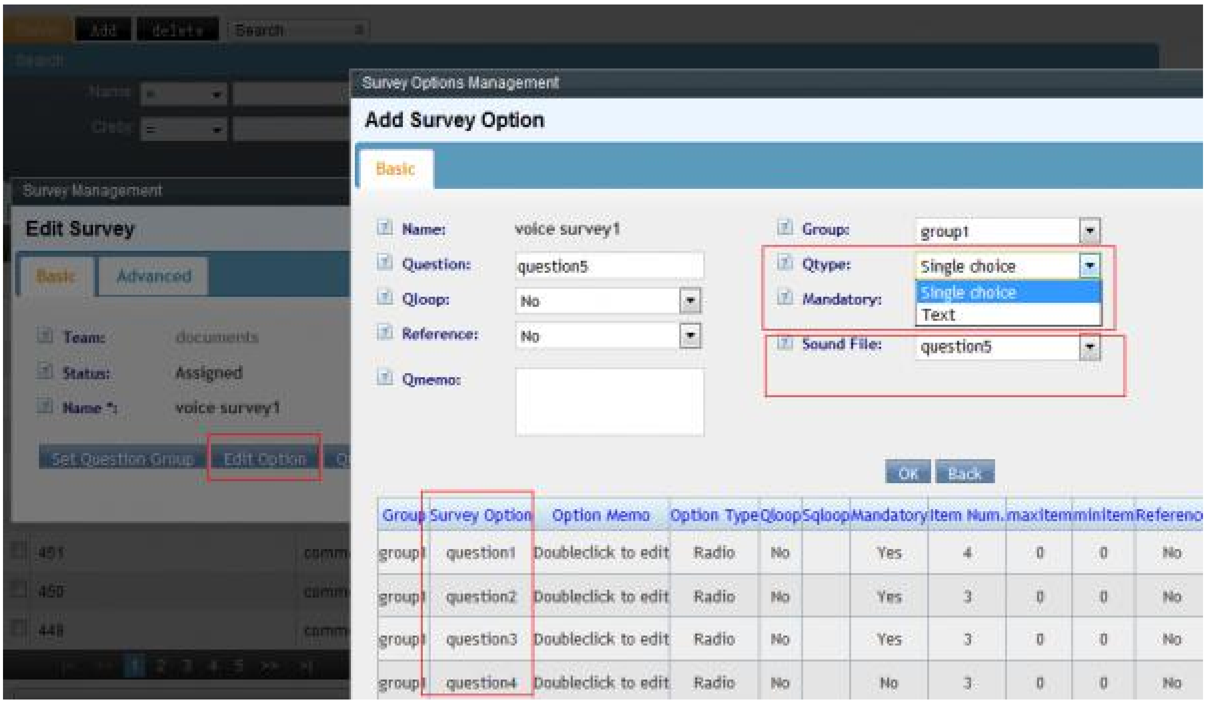
select Yes for "Close Quota", because in voicesurvey, it doesn't support quota yet. (quota is used when you only want get a number of survey from specific people, like 30 men, 30 women, survey will end if we already have enough survey)



You need group all the questions for easier management, so we need add Question Group first



Then we start to add questions

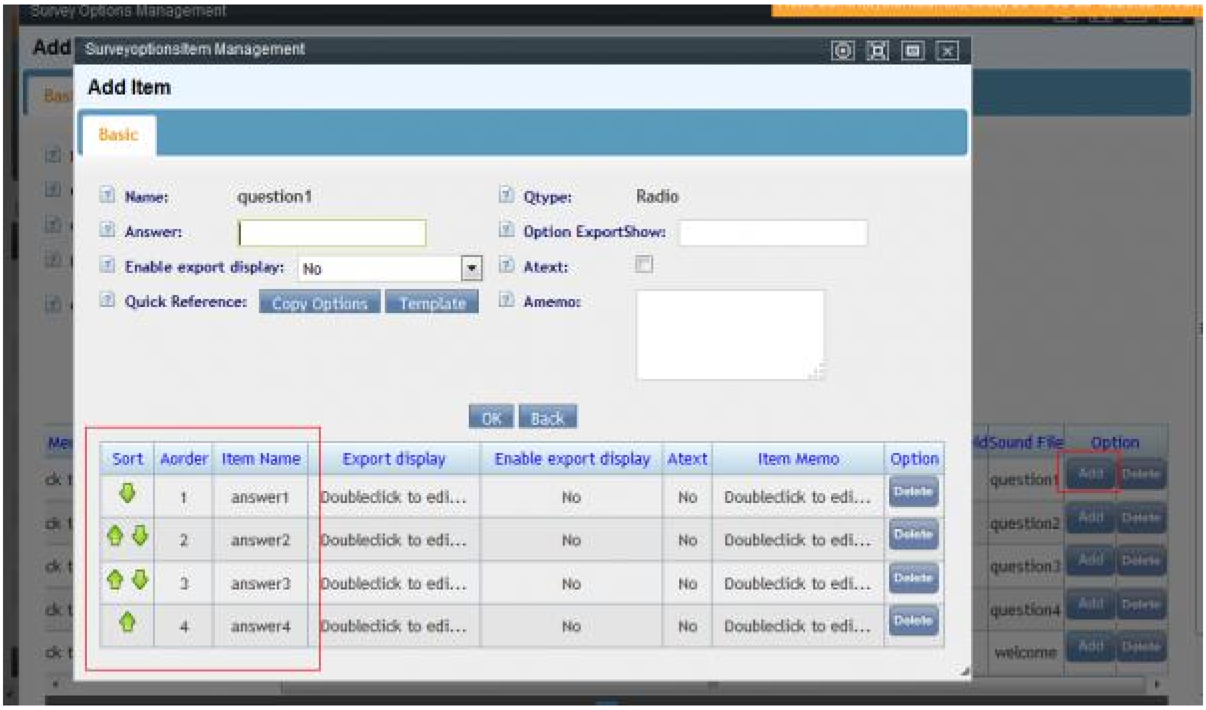


In a voice survey, for now we only have two types "single choose" and "text" Example: Single Choose: please rate for the service: press 1 for worse, 2 for normal, 3 for satisfy, 4 for wonderful Text: please give a score for the service, from 0 to 100. Compared with the general questionnaire, you need 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.

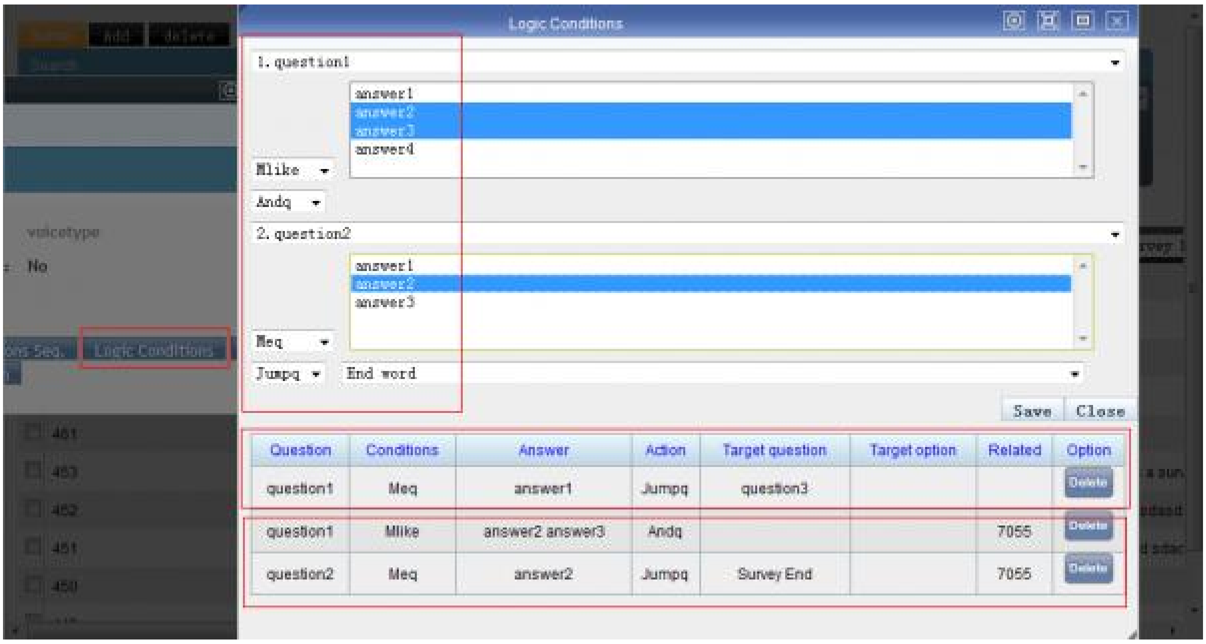
When it's set, click “OK” for next question.

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.



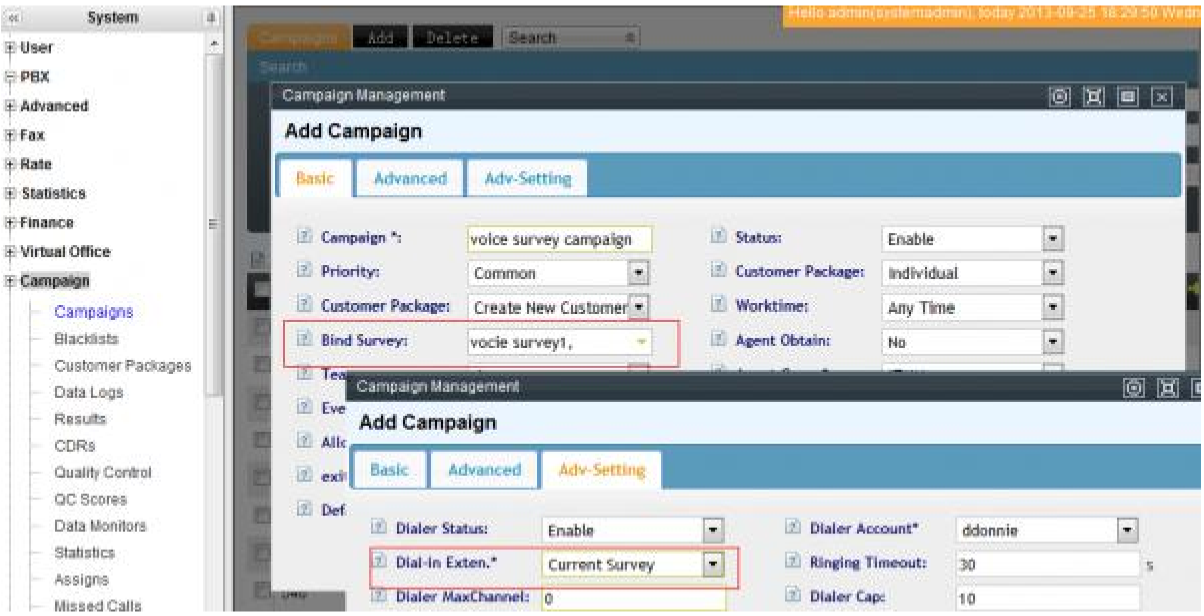
If you need to follow the user to enter the questionnaire answers questions to jump, then you need to set the questionnaire logic, set in the same way with ordinary questionnaire



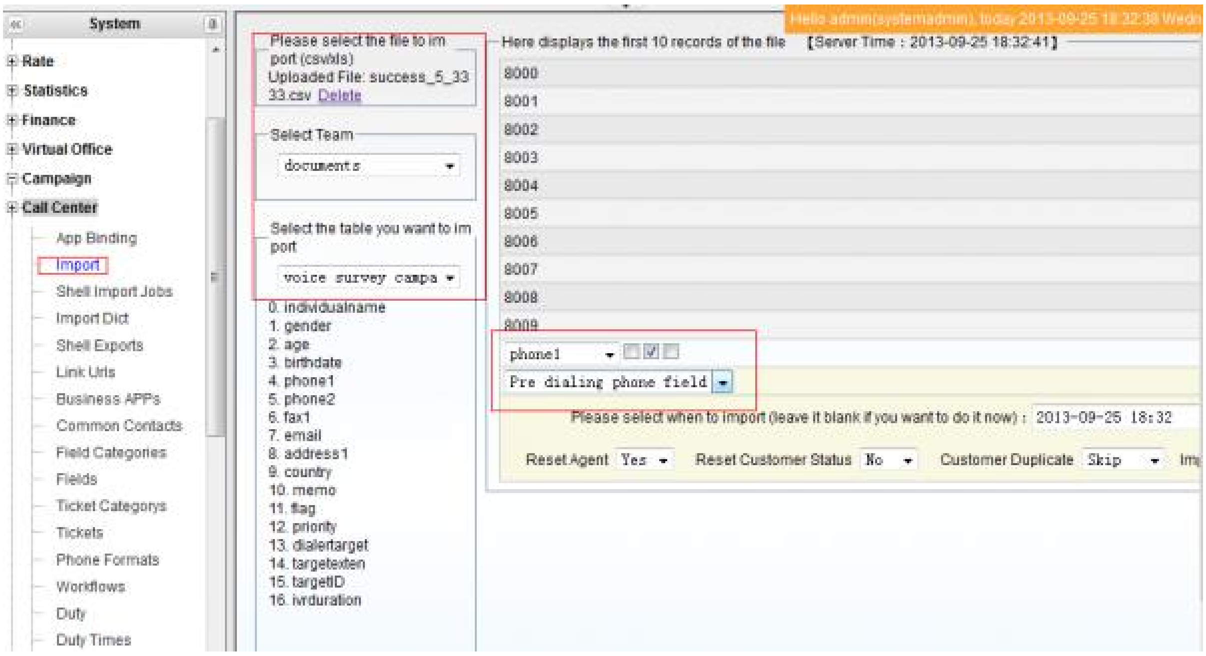
The figure above jumps to set up two logical rules, one is a single conditional jump (choose one of the options for question 1 1, jump to question 3), and the other one is a compound conditional jumps (when the problem a select option 2 or three, and the answer to question 2 select 2, the end of the questionnaire)

3)Add a campaign

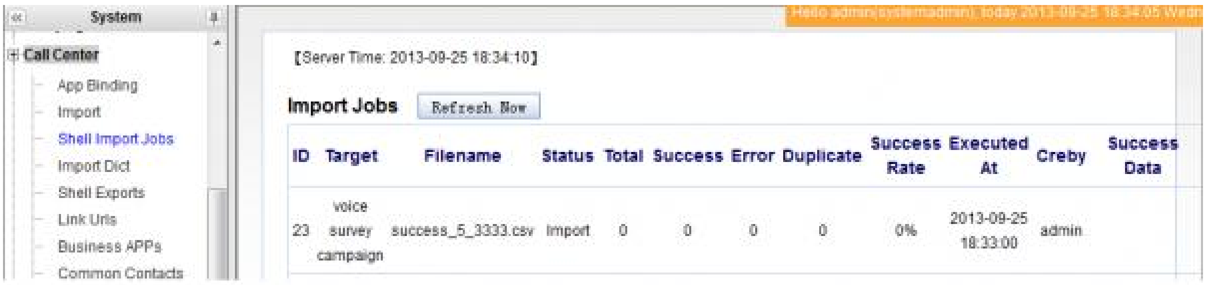
Go to Campaign → Campaigns, create a campaign for the survey, and you need select an agent group for the campaign(even no agent need in this campaign at all), and select the voice survey we just created. In tag "Adv-Setting" → Dial-in Exten, choose Current Survey, then when customer answer a call, system will transfer the call to the voice survey which is bound with the campaign.



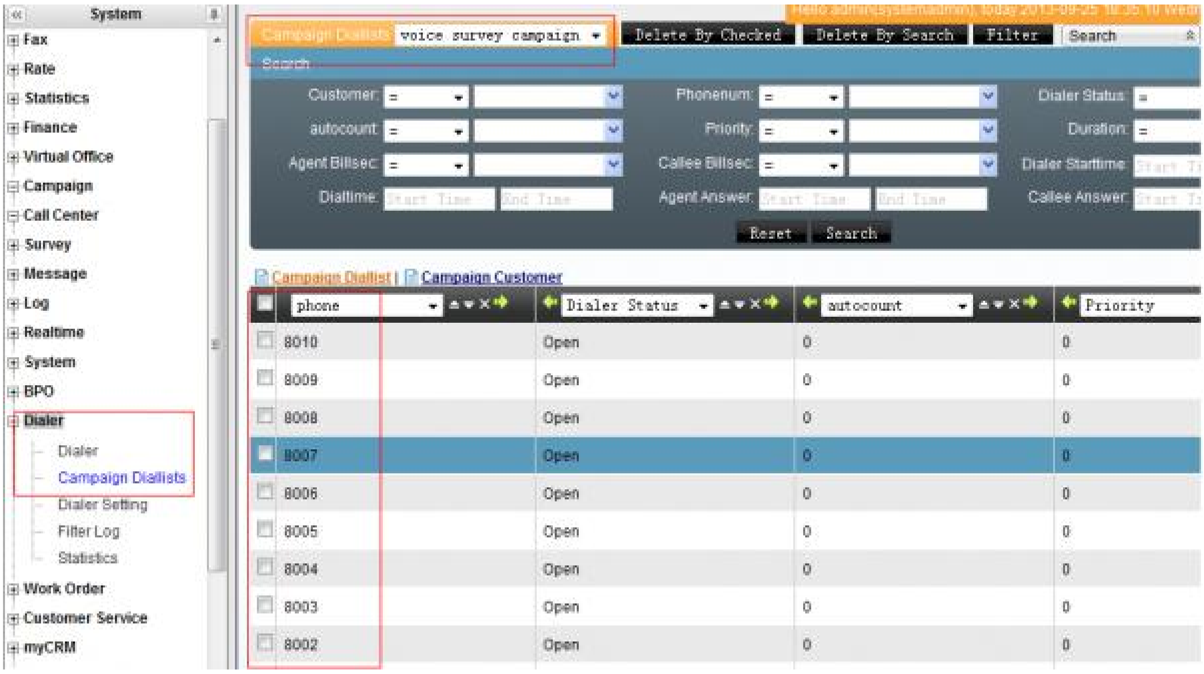
Import of pre-dial numbers, number list file upload (comma separated csv mode, utf8 coding best), select the team and select the previous step to create a task corresponding outbound client package (selection table), select the corresponding column in the list corresponds to customer data item, select 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.



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

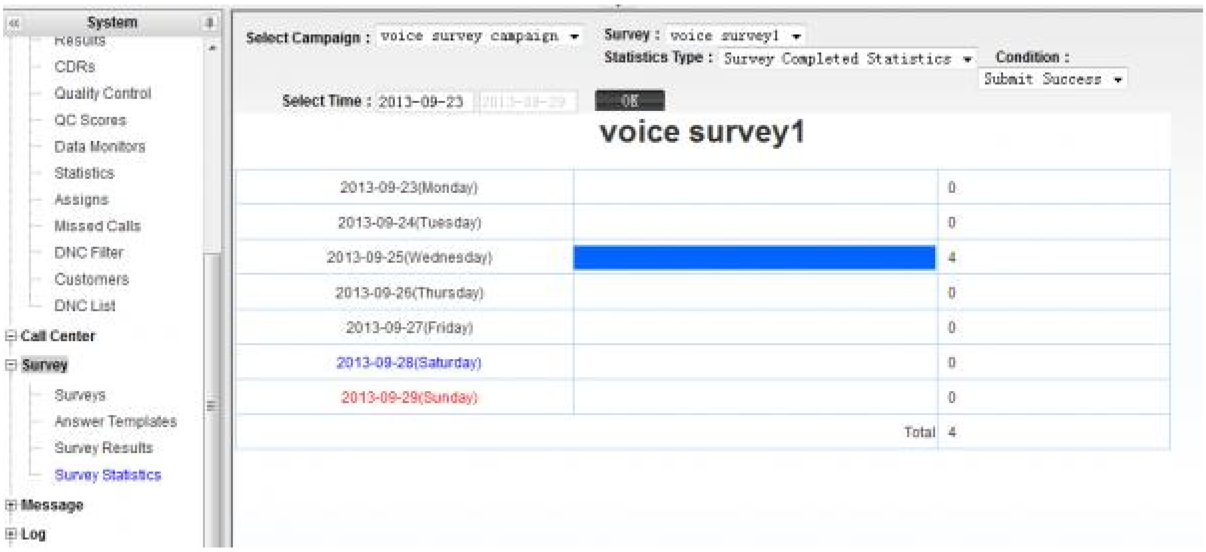
Go to Dialer → Dialer, select the team, find the campaign, because we don't need agent in the voice survey, we just use "By Max Calls" which means how many concurrent calls this campaign will have, click "Start" to fire.

Customer Answered means it's connected.

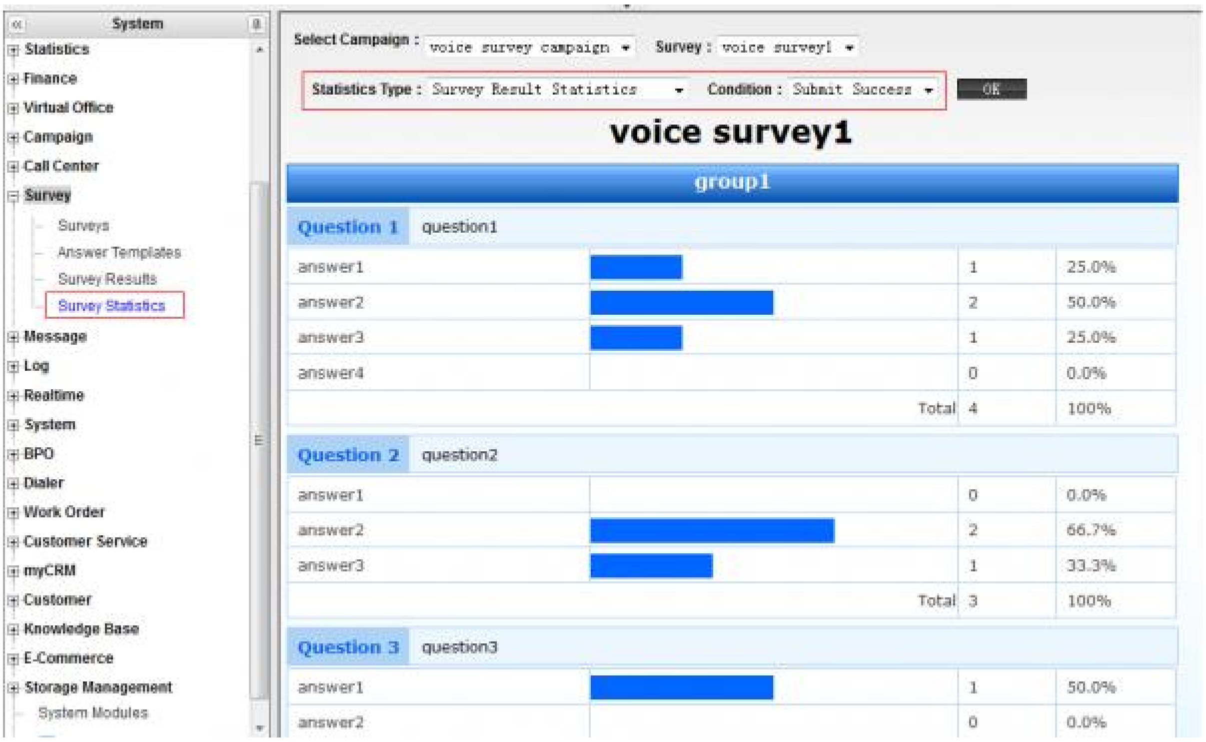
5)Statistics

Go to Survey → Survey Statistics, you can get

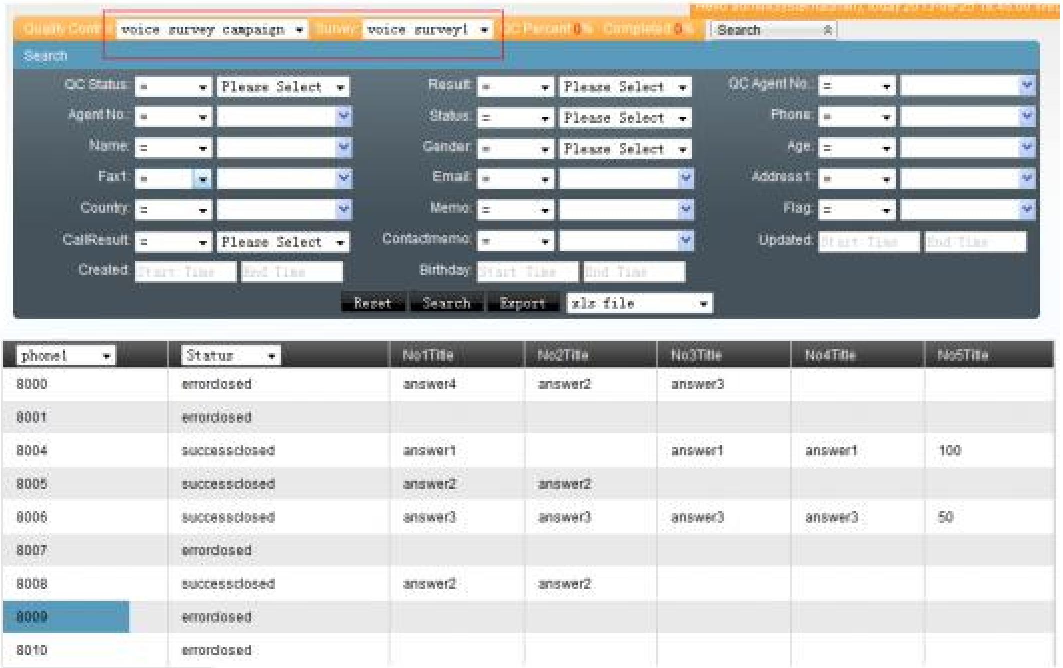
How many callees finished the survey.



The scale for each option in a question.



For detail, you can go to Campaign → Quality Control to check



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.

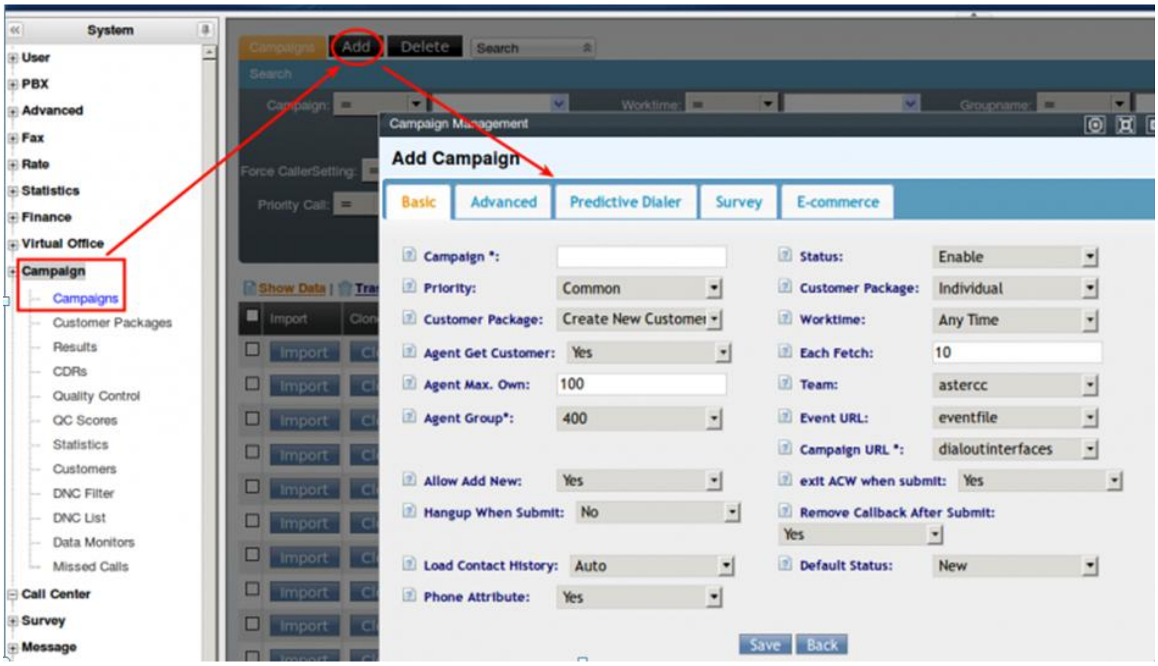
8006: answer all questions, success closed

8007 8009 8010: customer has no valid input, error close

26.10 How to Config Inbound Popup for Campaign

1) Create the Campaign

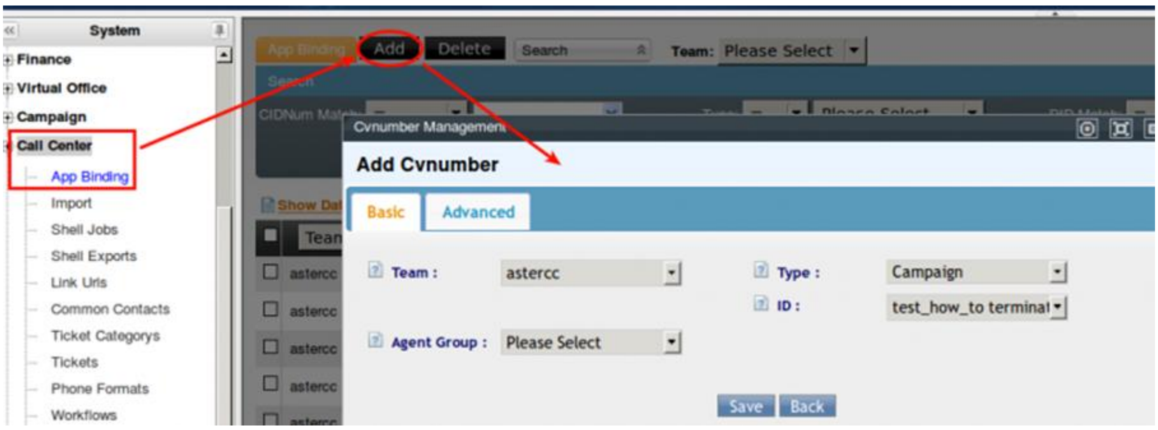
Go to [Campaign] → [Campaigns],you can go to adding interface via click "Add" on the top of page, as the figure shown below:

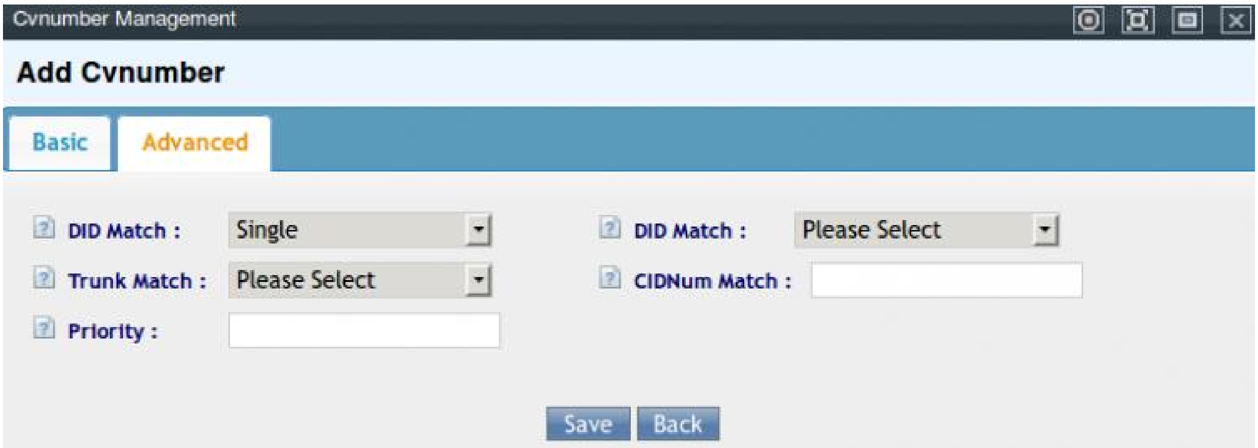


You can refer to Campaigns to realize the meaning of fields in this interface,then configure it according to your needs.

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

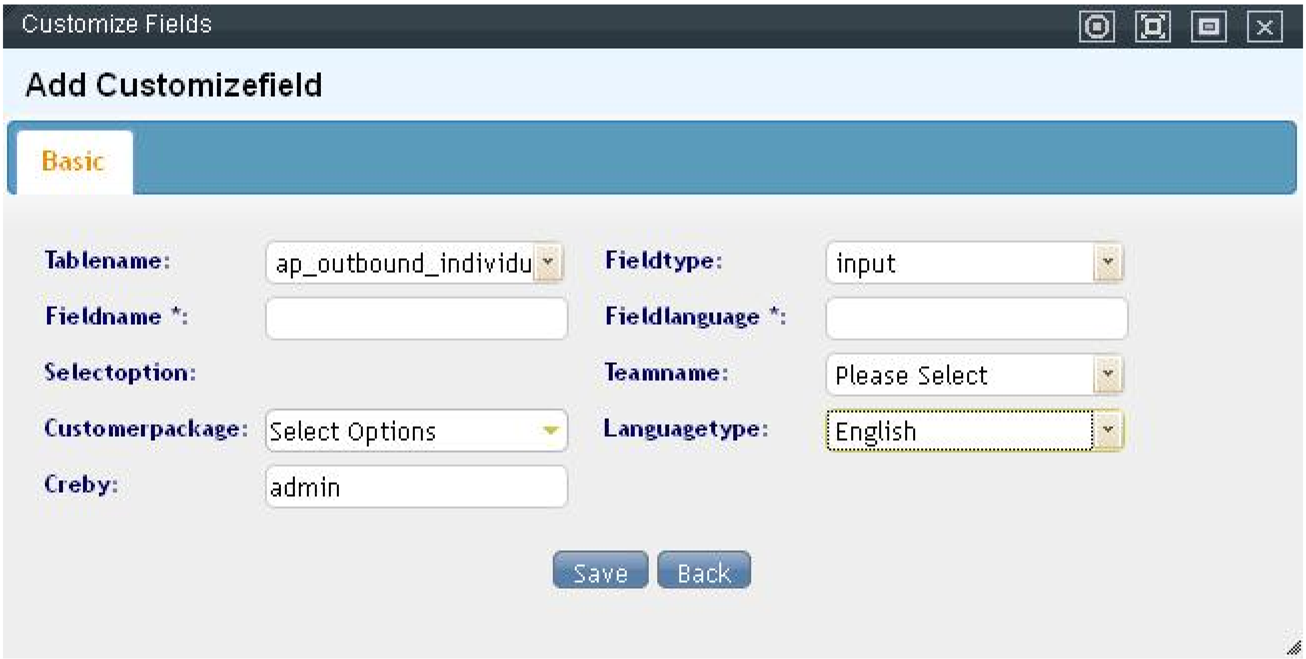
The details of customer will popup under the campaign dialout interface,although the customer dialed in.You can modify and save the details after double-click.And the History details is following,include AgentNo,CallType,CampaignResult and so on.

26.11 How to customize customer information fields and import data

When we try to import data to the customer package, the column doesnt 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 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 

, 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.

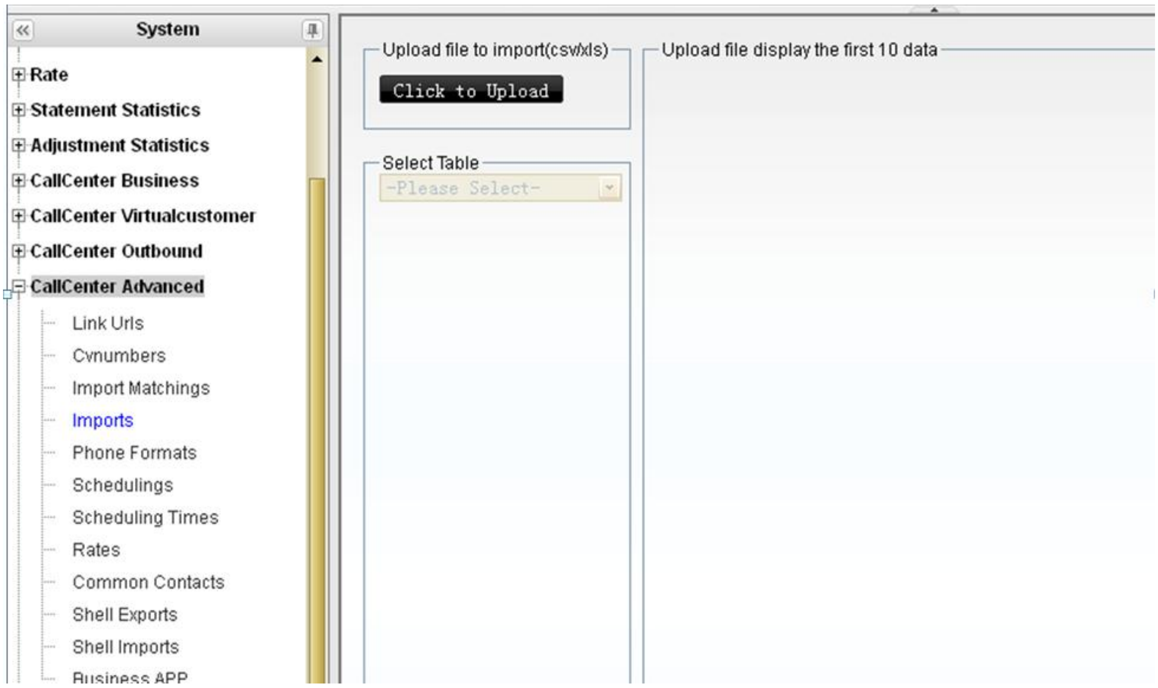
If you are going to add a identification number field, enter “identification number” in the fieldlanguage (on condition that the default language of the system is English).

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

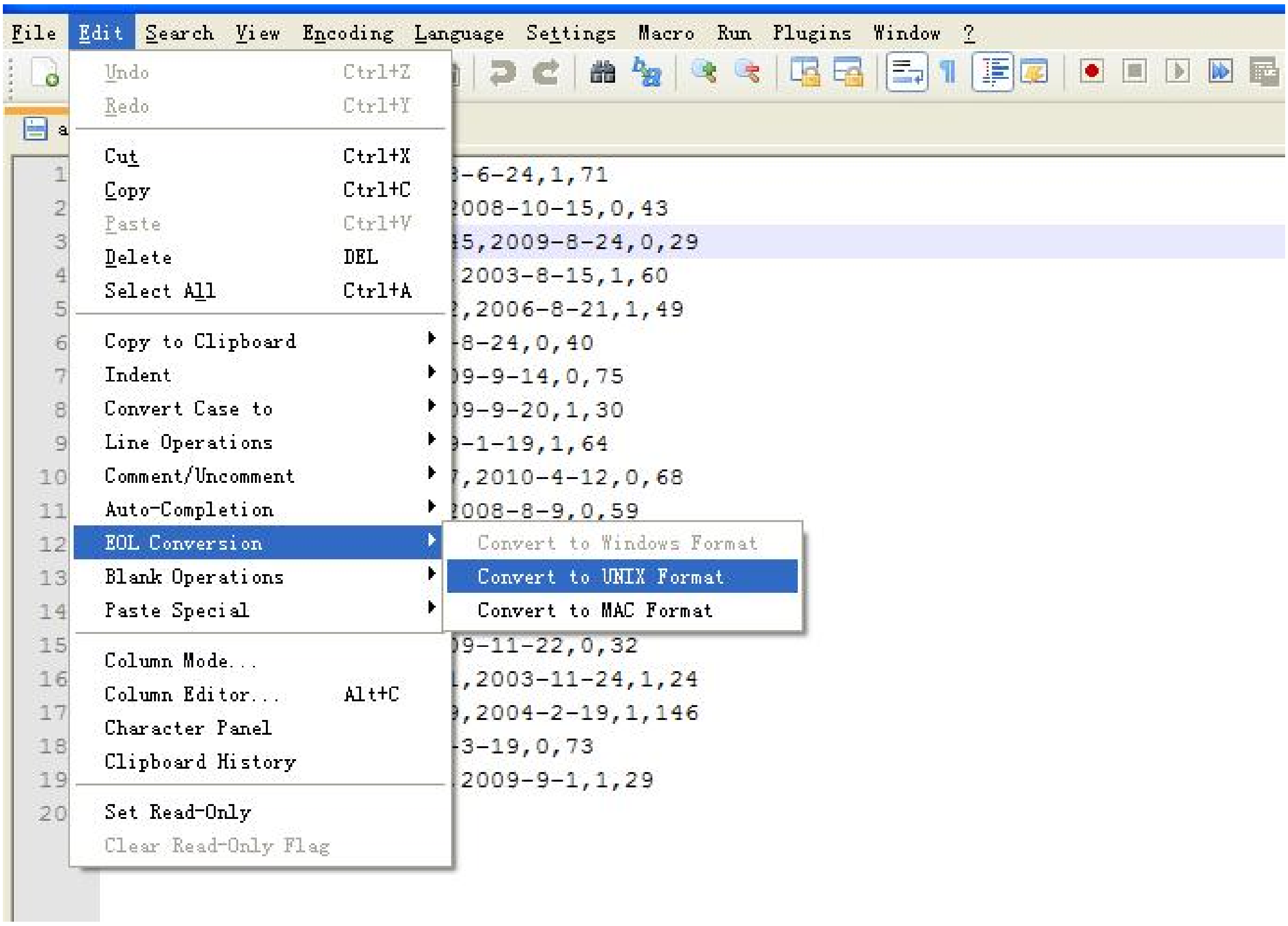
Then we are going to import the customer information which involves these fields. Under the system management, opne Callcenter advanced→ Imports.

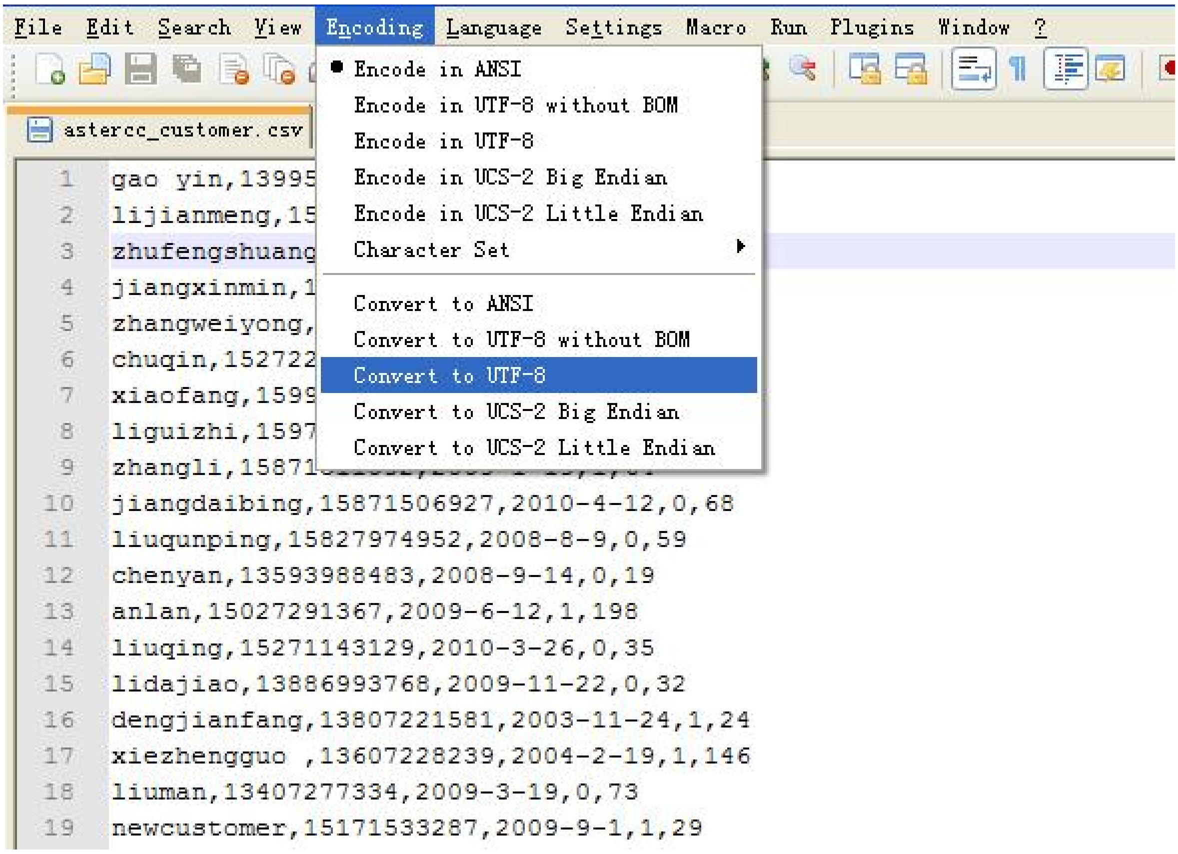


Choose the file to be imported, and the first 10 items will be shown.

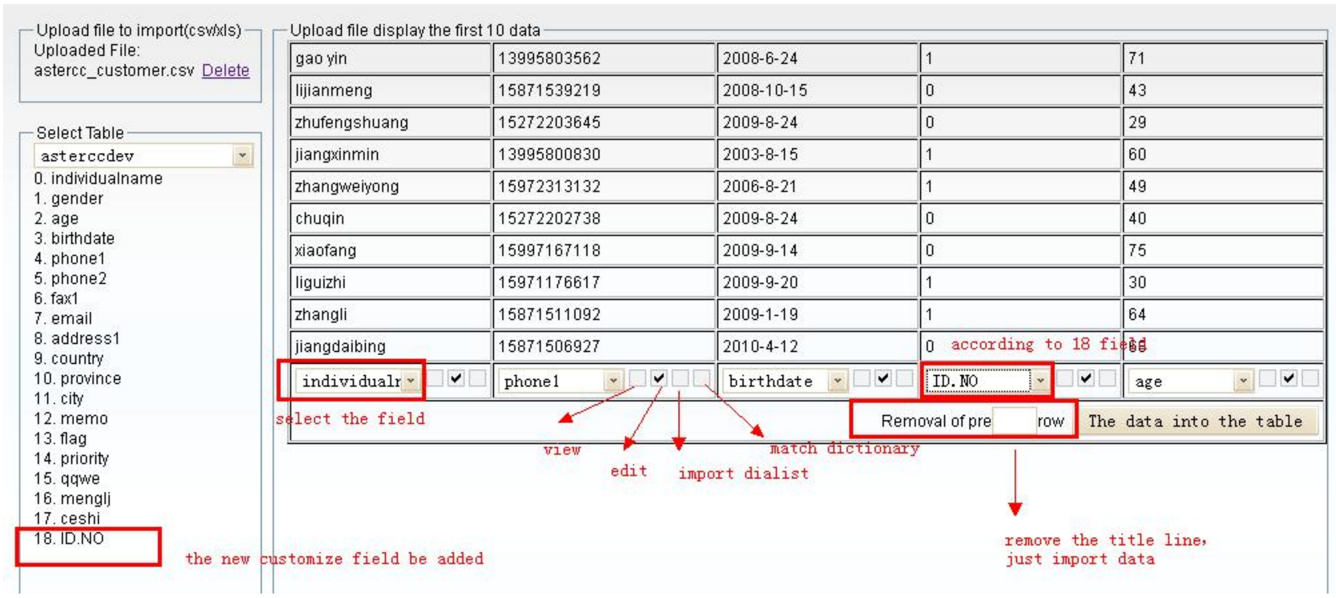
Before upload, you need to convert the format if the it is a csv file following these steps:

Open your file in Notepad++, do as the picture shows:


File
Edit
Search
View
Encoding
Language
Settings
Macro
Run
Plugins
Window
?
Undo Ctrl+Z
Redo Ctrl+Y
Cut Ctrl+X
Copy Ctrl+C
Paste Ctrl+V
Delete DEL
Select All Ctrl+A
Copy to Clipboard
Indent
Convert Case to
Line Operations
Comment/Uncomment
Auto-Completion
EOL Conversion
Blank Operations
Paste Special
Column Mode...
Column Editor... Alt+C
Character Panel
Clipboard History
Set Read-Only
Clear Read-Only Flag
Convert to Windows Format
Convert to UNIX Format
Convert to MAC Format



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

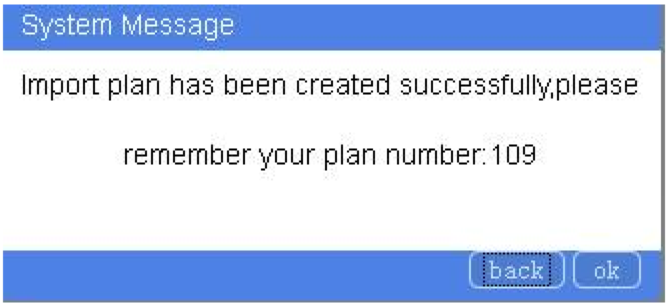
Every field is followed with a box, and you can choose whether to match this field to the dictionary, which equals to the system's matching function of the imported data. Tick the box if the field can be imported into the database only when it matches the dictionary.

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.

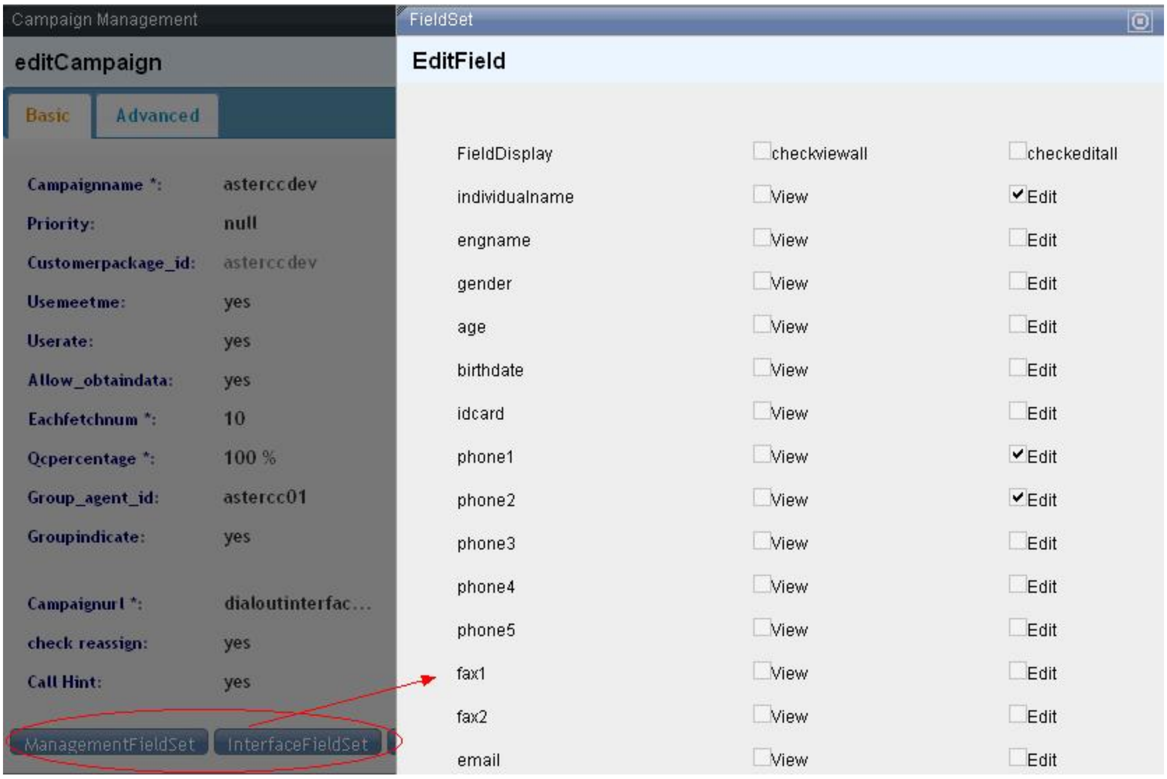
Shell Import Management   Refresh Now

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	Download			Download	Delete
108	asterccdev	astercc_customer.csv	closed	19	19	0	100%	2012-03-22 10:04:22	admin	Download			Download	Delete

"Download" would appear when the data is imported. If you are notified a failure or a repeated download, you need to back to the compaign management of that customer package and check the information.

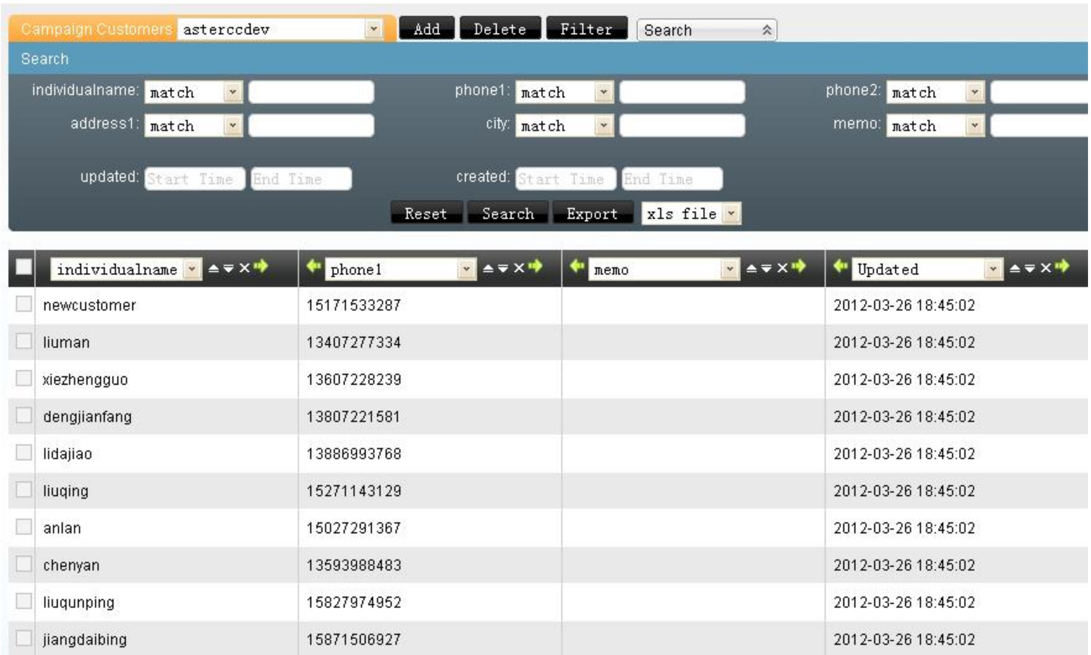
Field set

Open the compaign management of the customer package, double-click the item.



At the bottom of the interface we can see two buttoms 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 agants, while [Managementfieldset] is for administritor's own use.

After setting, you may need to enter the Compaign Management of the customer package to see if the data have been imported succesfully. They should all be in the list.

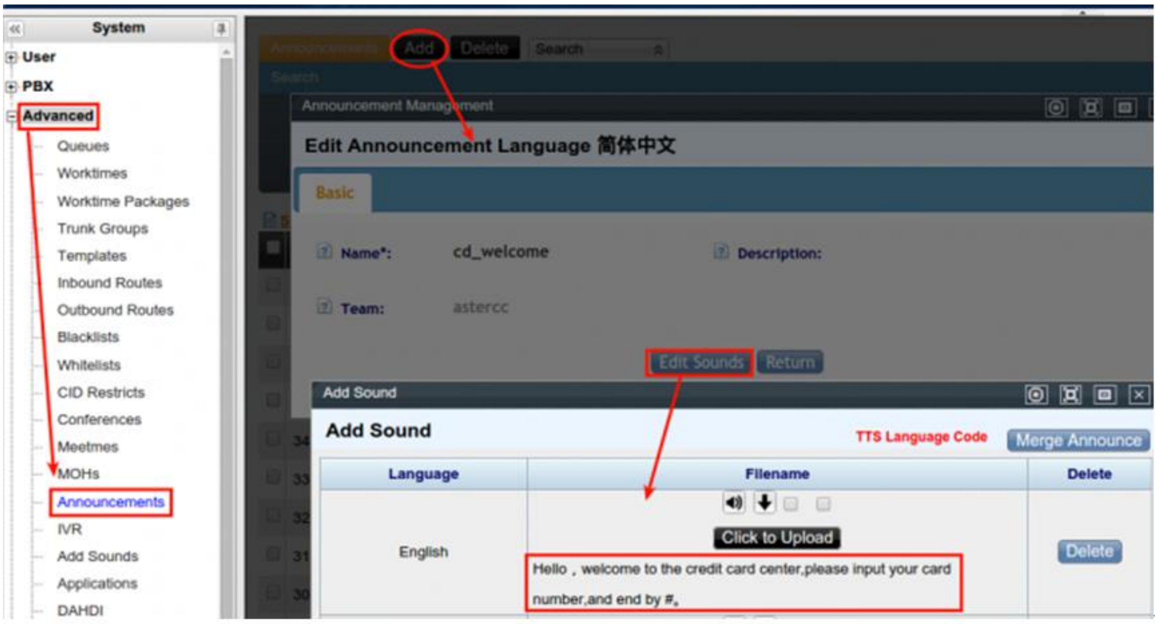


26.11 How To Verify Validity Of Credit Card In IVR Module

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。

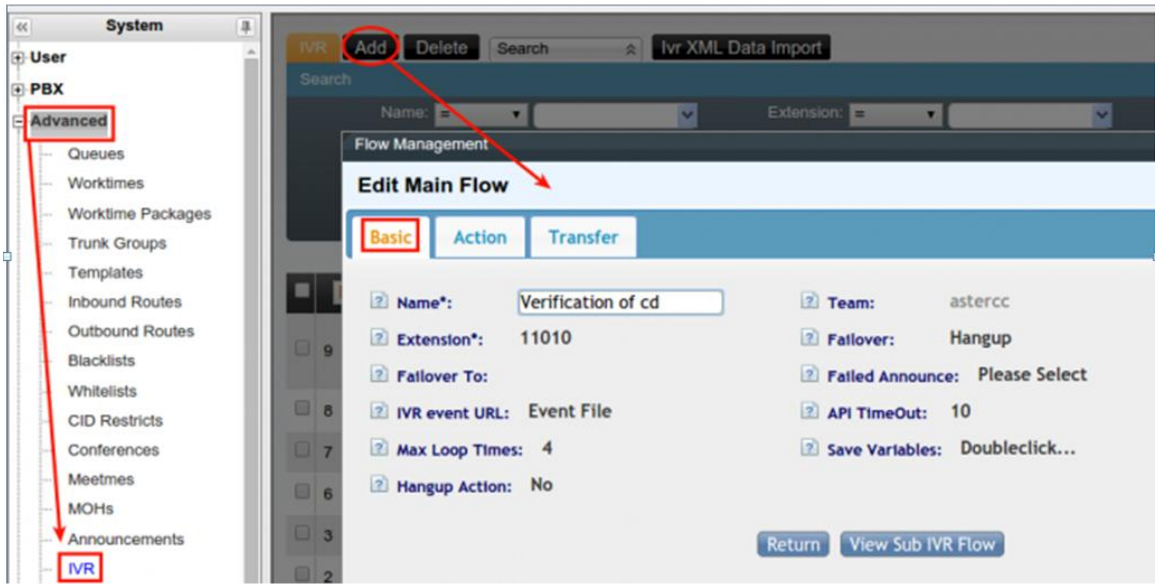
1.Add Announcements

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:



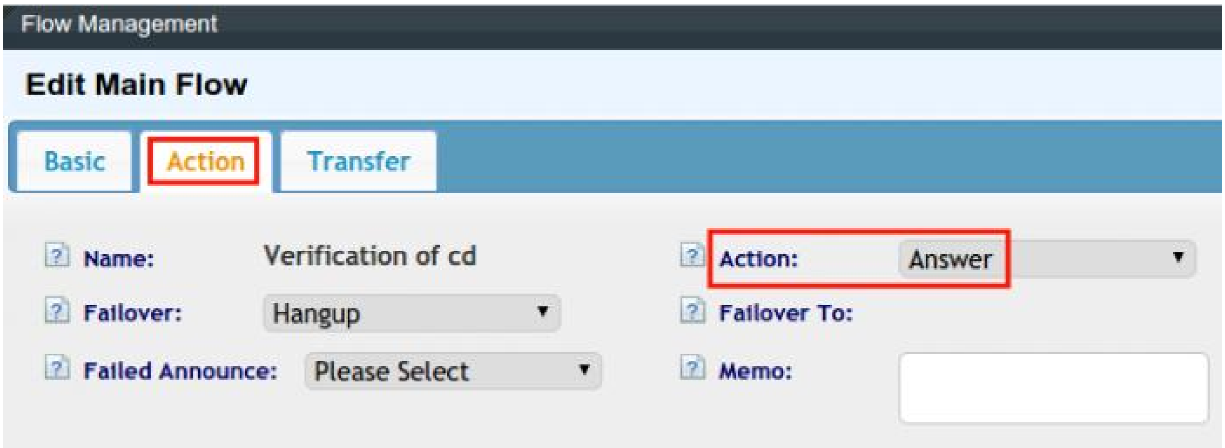
2.Add Main IVR Flow

The main Flow used to Verify the credit number。Click[Advanced]→[IVR]→[Add]，you can new a page of main flow，as following：

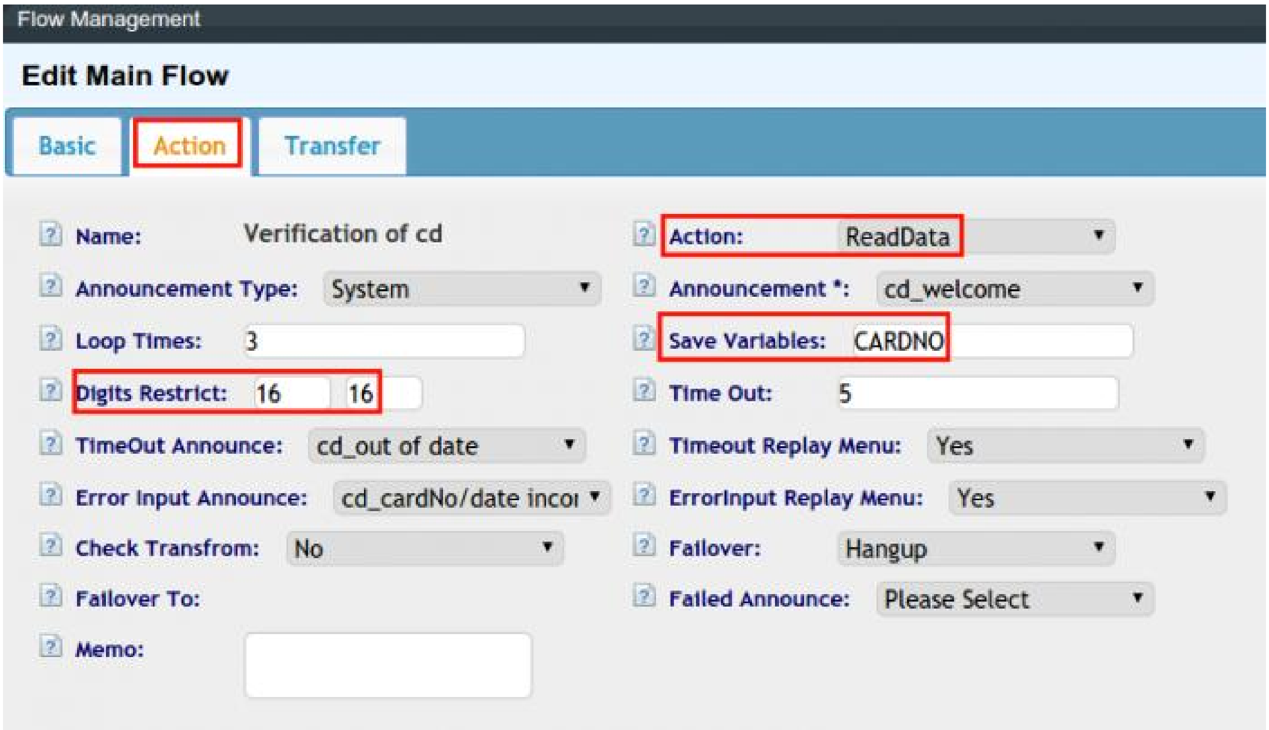


2.1 Action

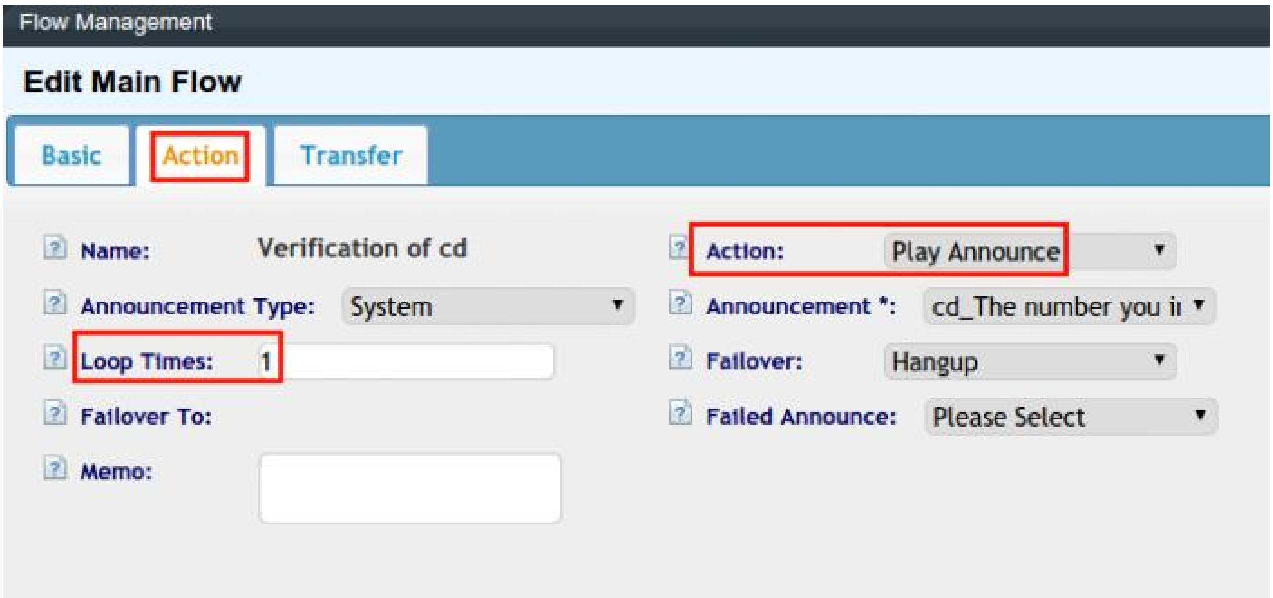
1).Add the "Answer" action。



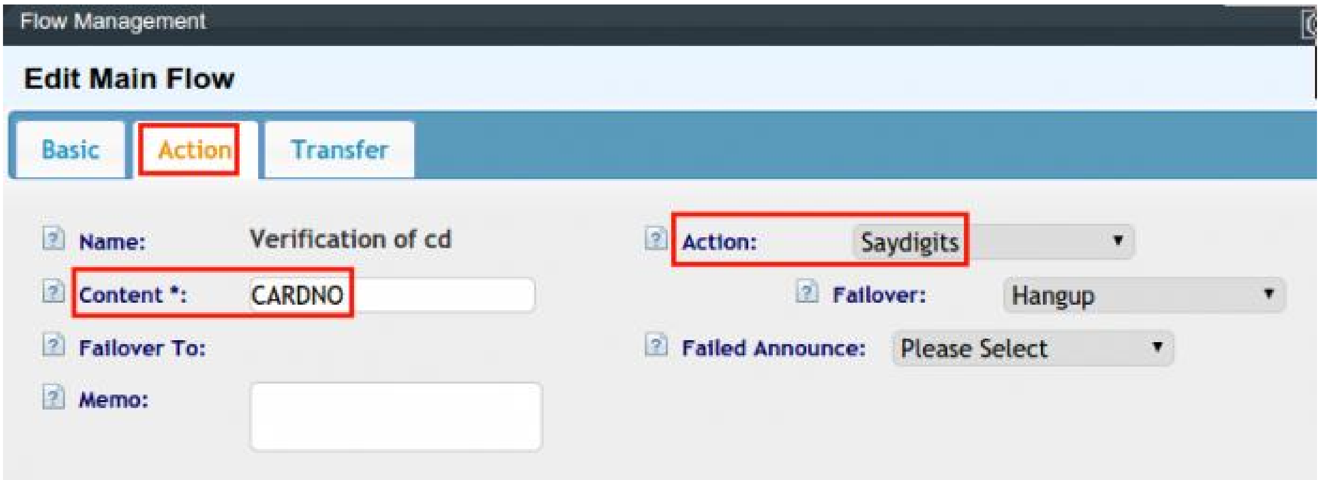
2).Add the "ReadData" action，you can hear "Hello，welcome to the credit card center,please input your card number,and end by # "，and then put the card number into the variable quantity named"CARDNO"。



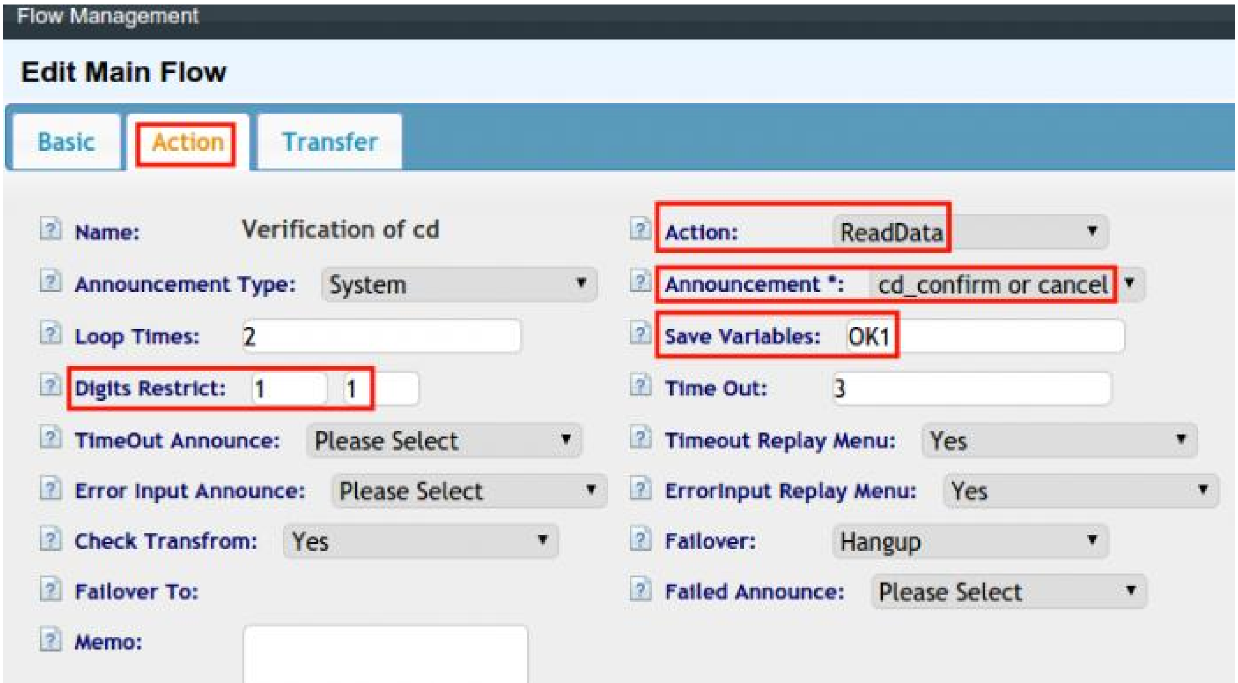
3).Add the "Play Announce" action，you can hear "The number you input is：", loop time is 1。



4).Add the "Saydigits" action， you can hear the number stored in variable quantity named"CARDNO"。Distinguish the difference between "Saydigits" and "Saynumber"。



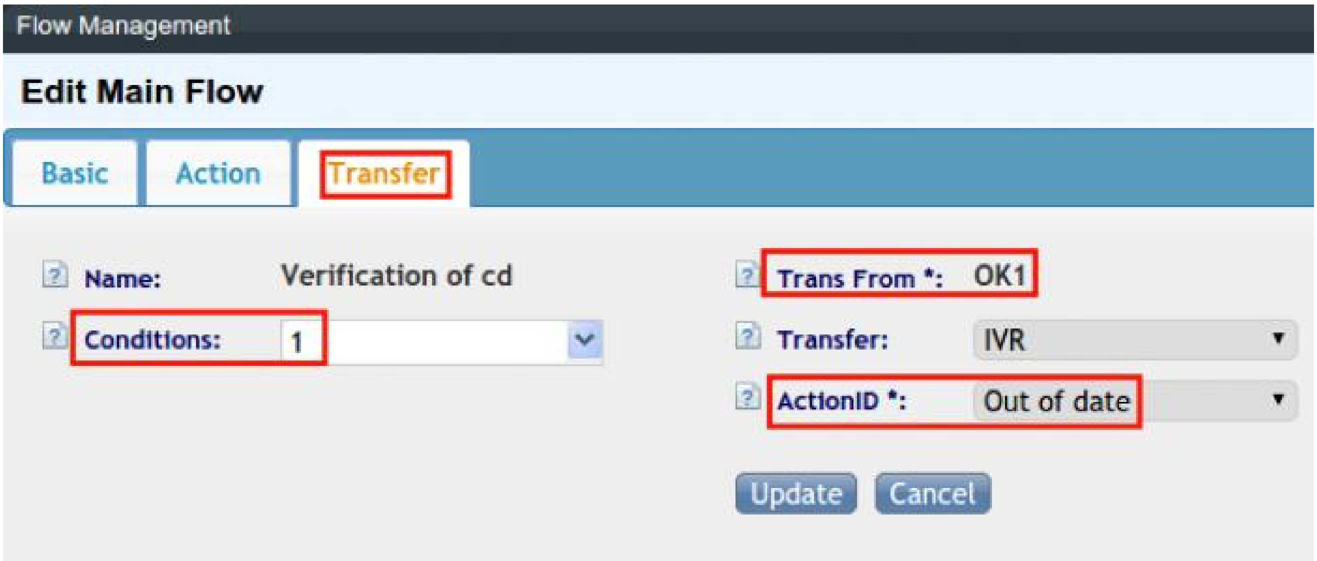
5).Add the "ReadData" action, you can hear "Press 1 mean confirming, else press 2", and store the press number into the variable quantity named "OK1"。



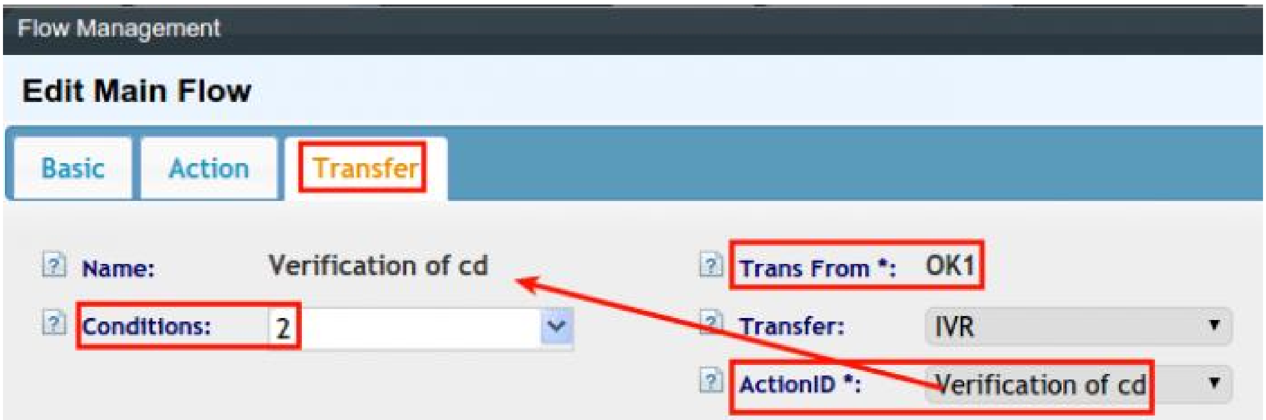
2.2 Transfer

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。

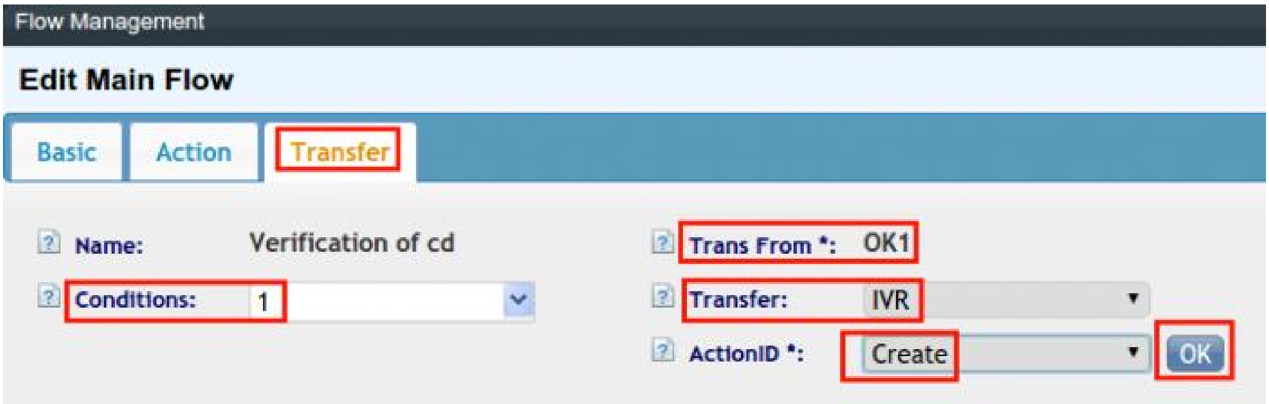


When the value is "2", return to this "Main IVR Flow", enter the IVR named "Verification of cd" to obtain the card number。

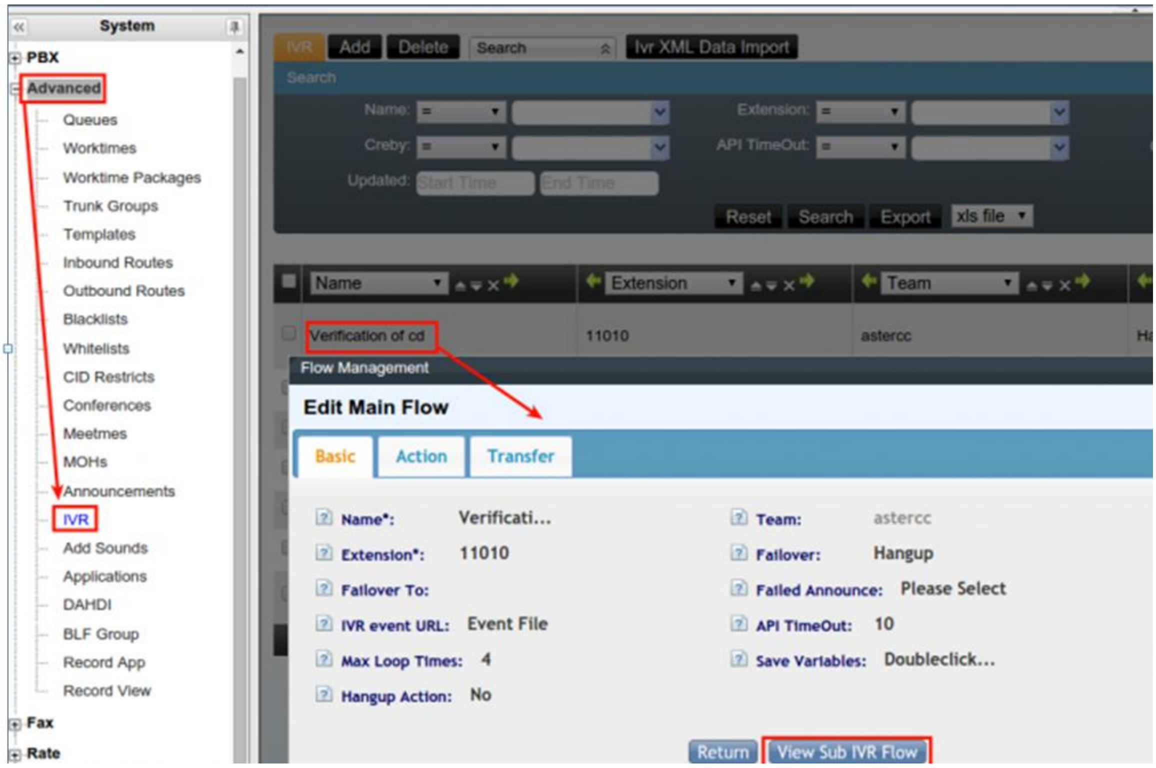


3 .Add the "First Sub IVR Flow"

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/edting page automatically, as following:

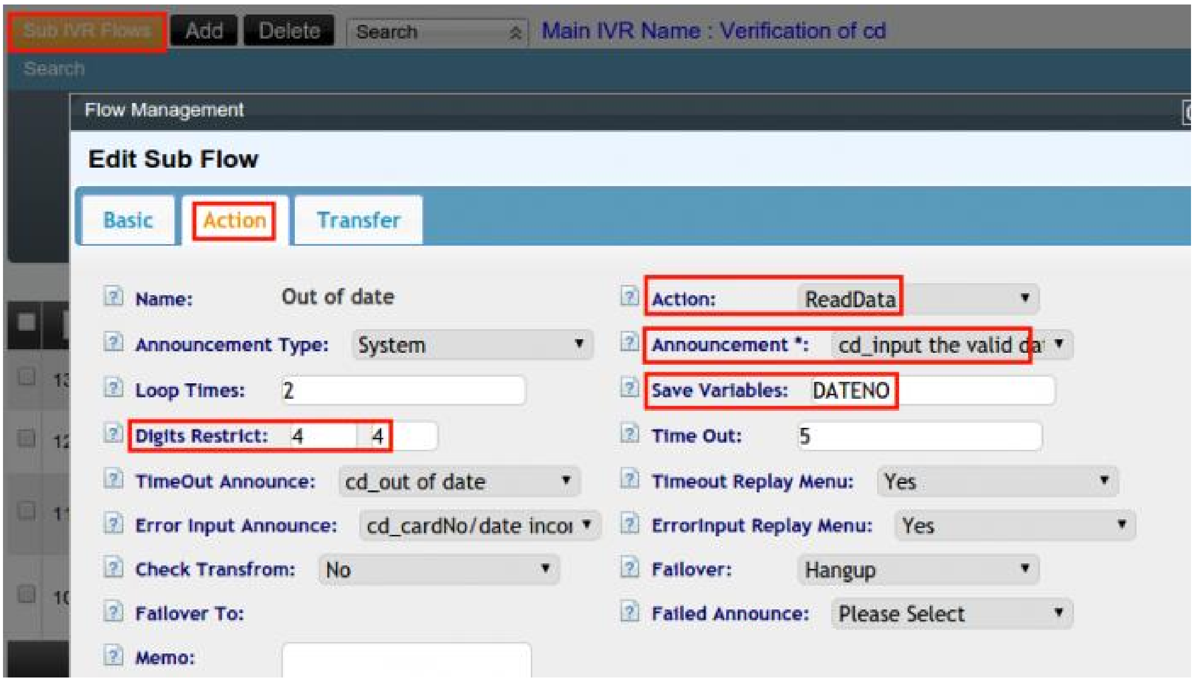


when edit it again, you can Click[Advanced]→[IVR], double click the main IVR flow, then click [View Sub IVR Flow], as following:

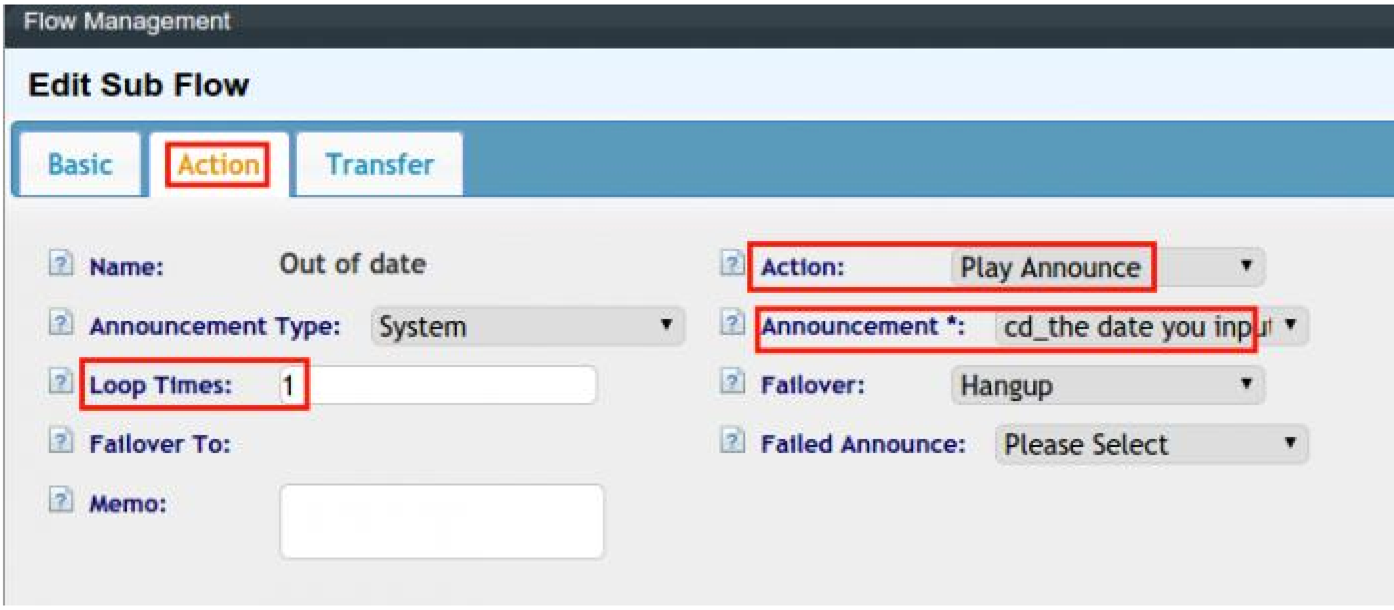


3.1 Action

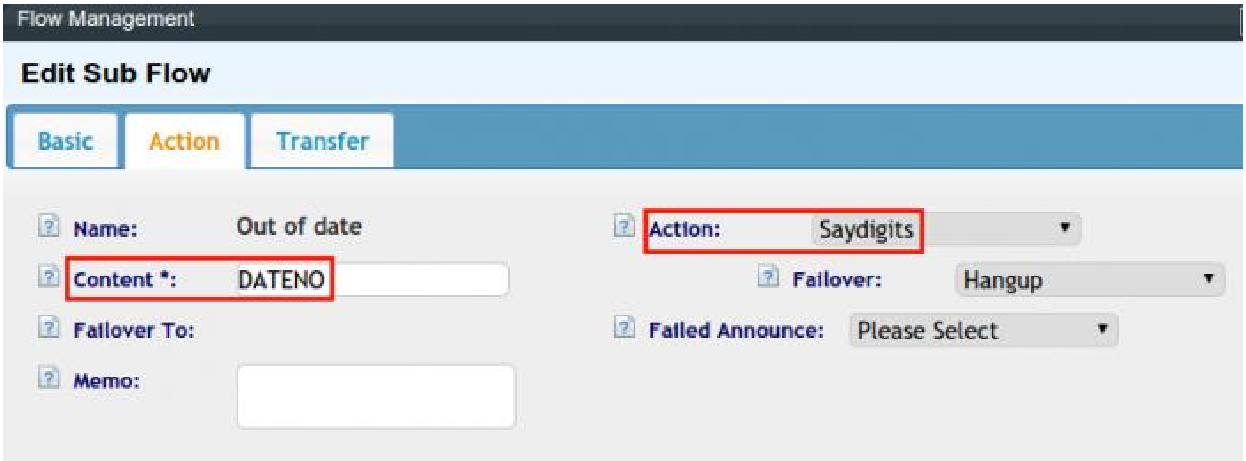
1).Add the "ReadData" action。you can hear "Please input valid date of the card: for example, October of 2015, you should press 1 5 1 0", then put the date value to "DATENO"。



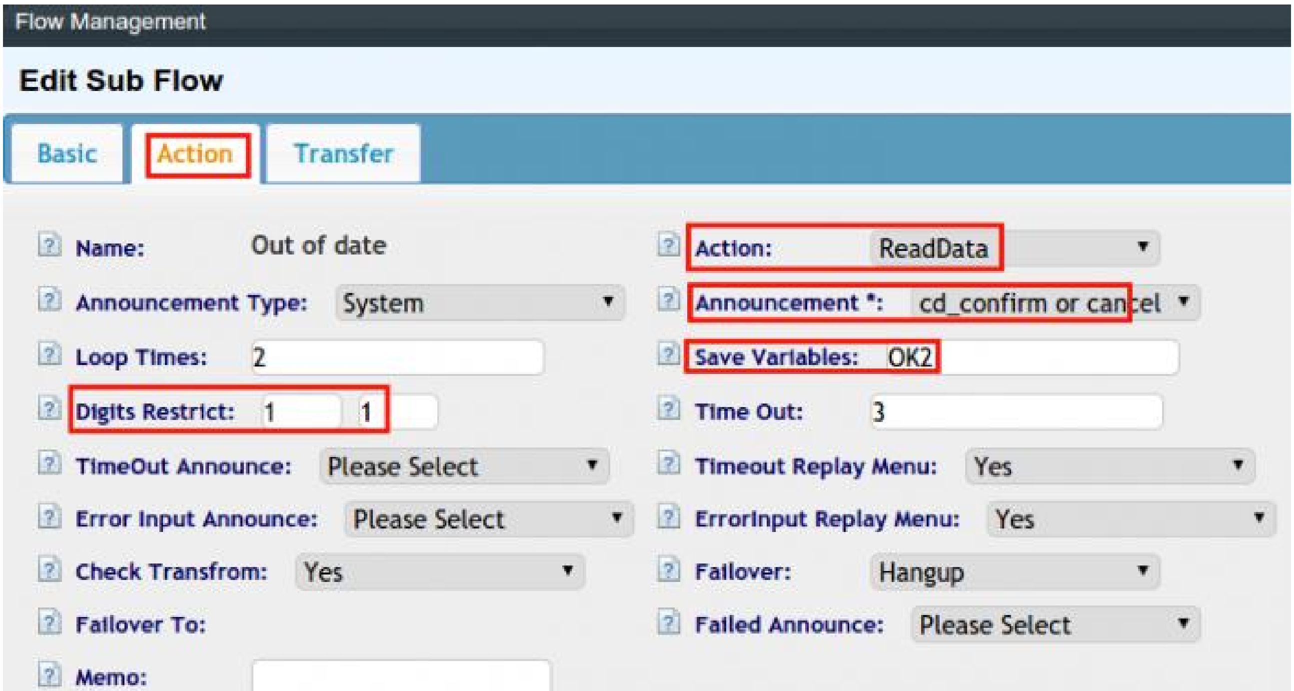
2).Add the "Play Announce" action。you can hear "the valid date of card you input is：", loop time is 1。



3).Add the "Saydigits" action，you can hear the date stored in the variable quantity named "DATENO"。



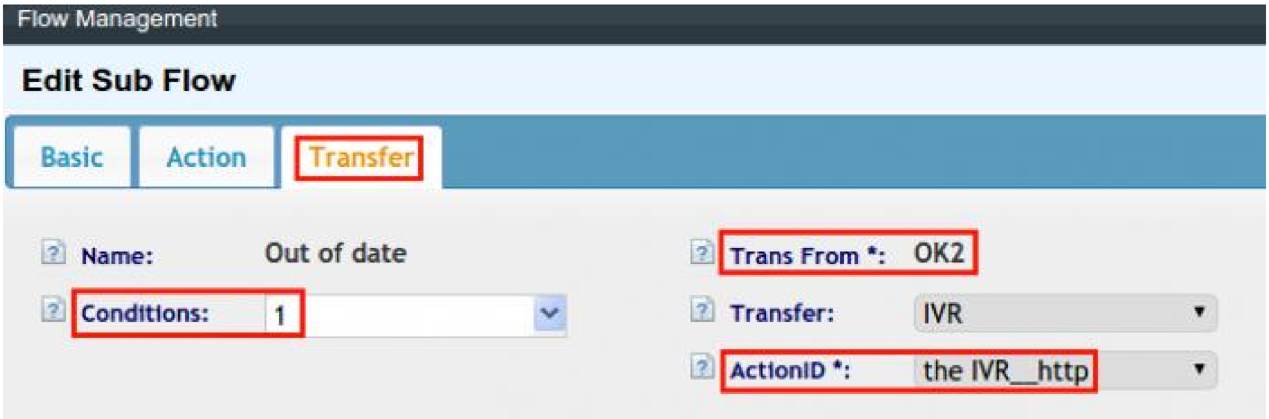
4).Add the "ReadData" action, you can hear "Press 1 mean confirming, else press 2", and store the press number into the variable quantity named "OK2"。



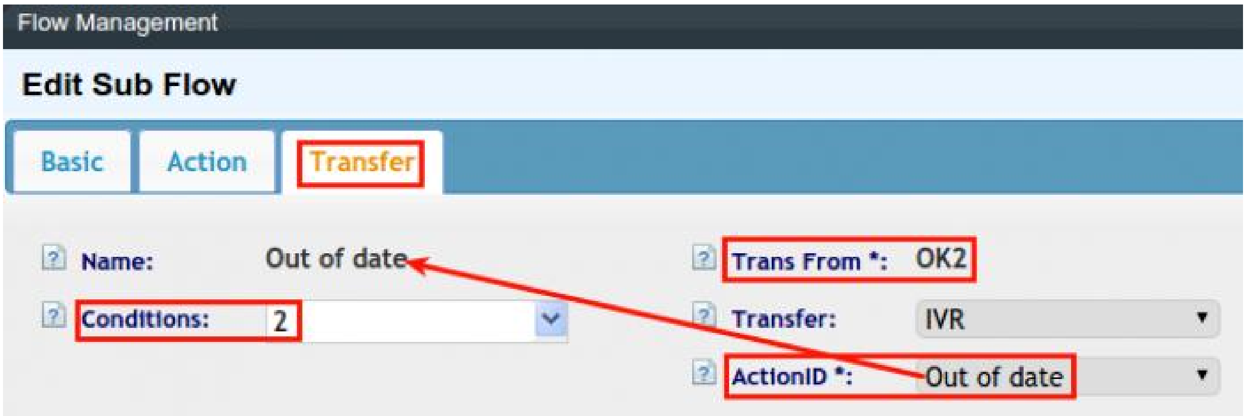
3.2 Transfer

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。



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。

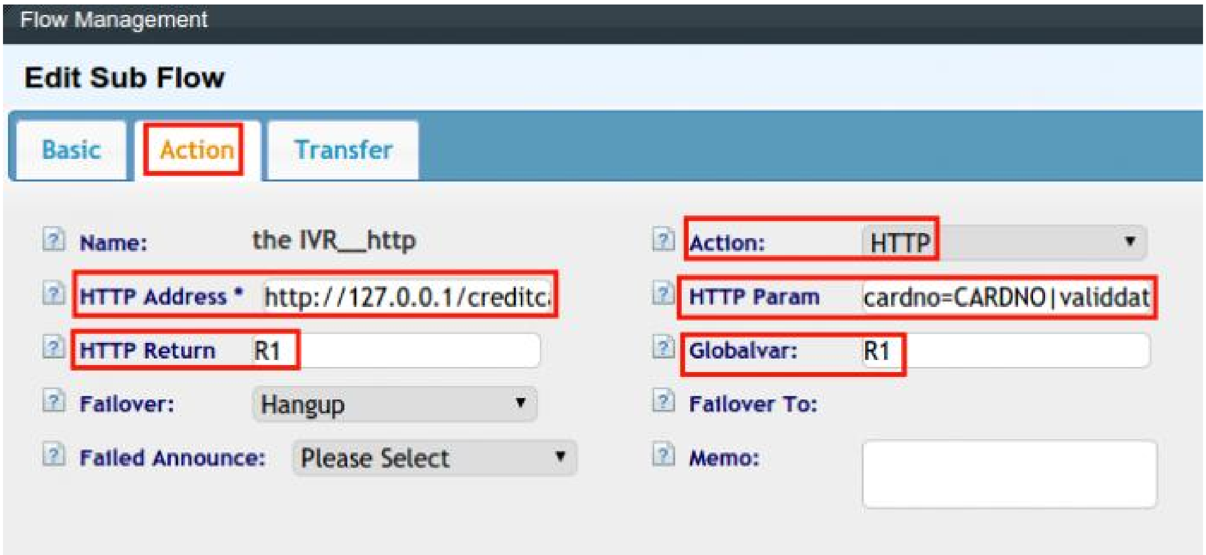


4.Add the "Second Sub IVR Flow"

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"。



Notice:

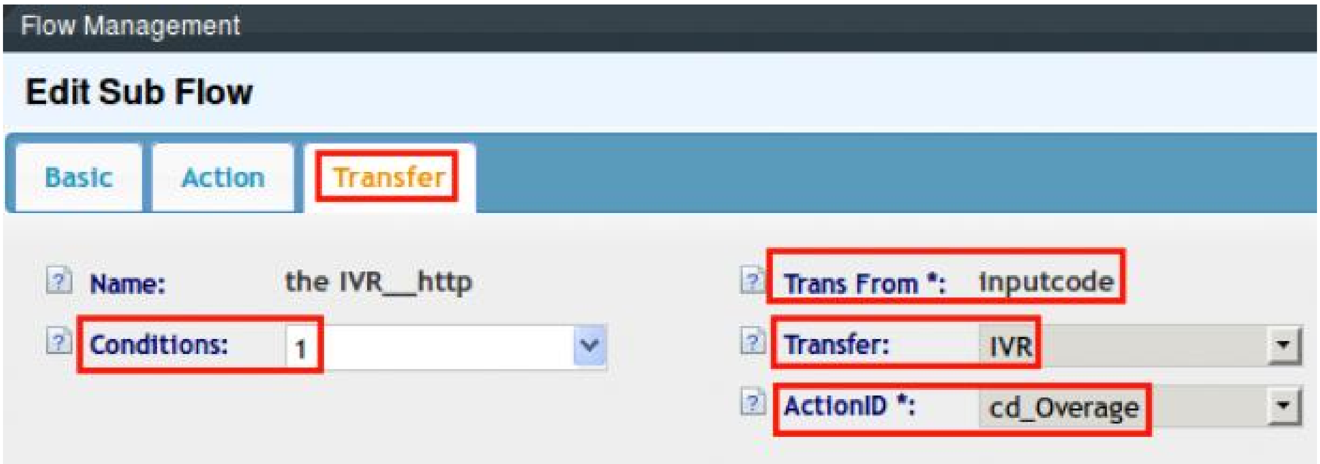
1.The format of "HTTP Param": inputcode|cardno=CARDNO|validdate=DATENO, (cardno and validdate are parameters from HTTP/Webservice, CARDNO and DATENO are number and date of card respectively from IVR。The head of them is "inputcode" default, so we don't write it usually。Two variabilities should be separated 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 "|"。

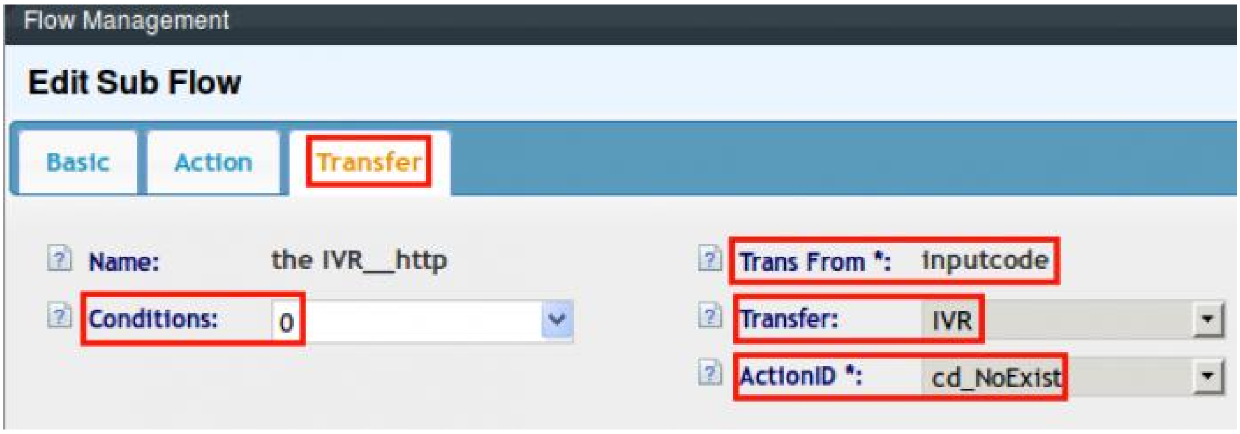
3.If you set the return value from HTTP to be global variabilities, you should definite it by capital letters。The global variabilities of "Globalvar" should be same as "HTTP Return" exactly。

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:"。



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".

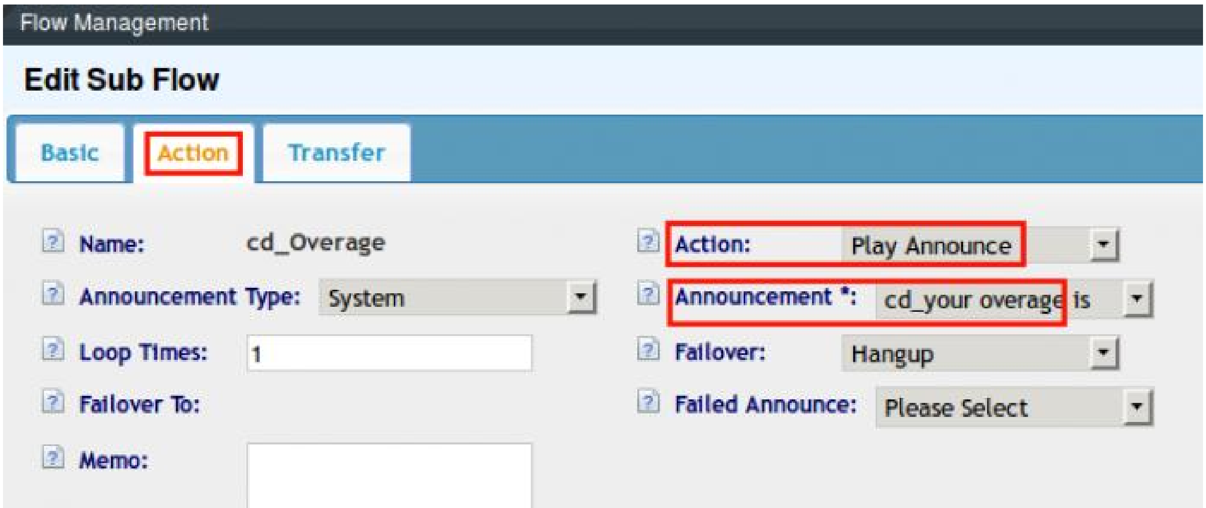


5.Add the "Third Sub IVR Flow"

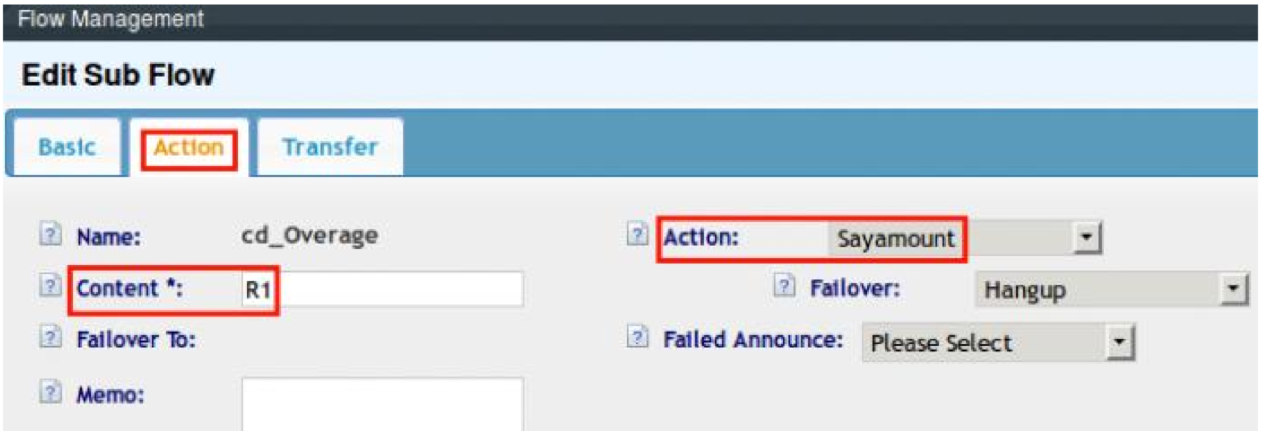
If the number and date of card are correct, you can hear the overage。You should press 0 if you want to listen again。

5.1Action

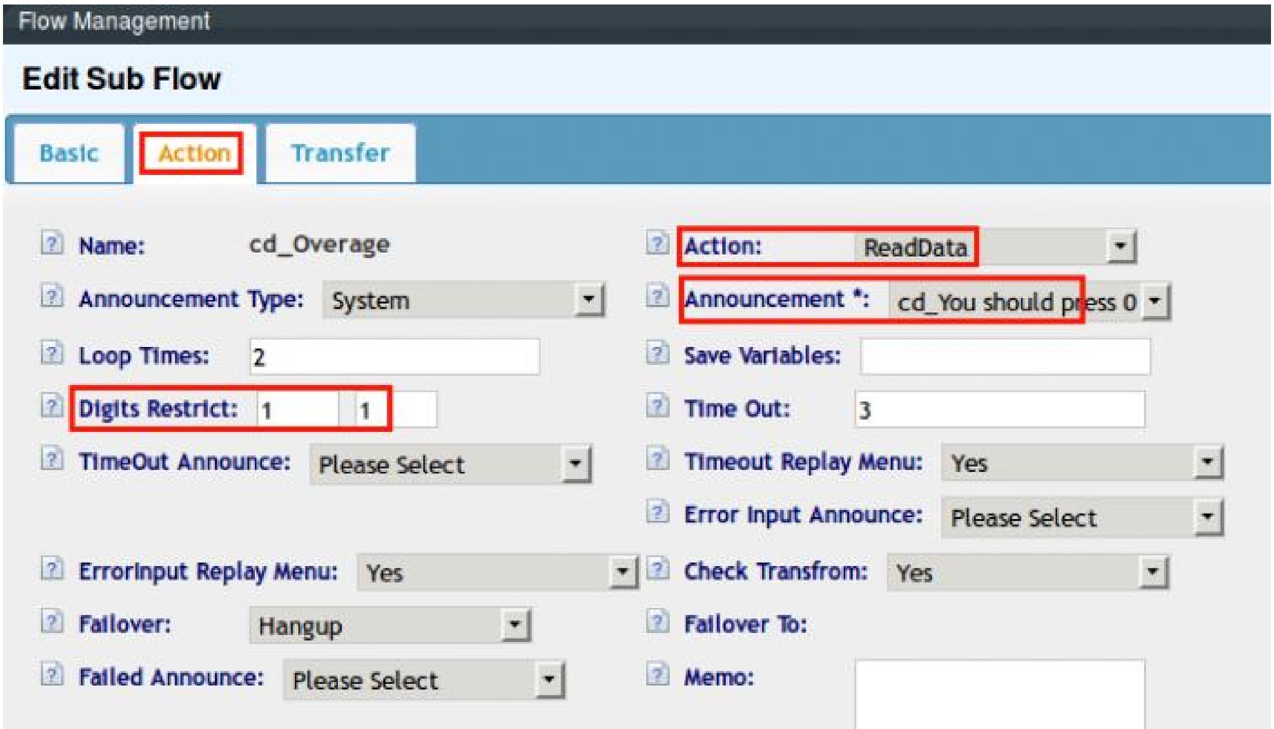
1).Add "Play Announce" action, you can hear "The overage of your credit card is:"。



2).Add “Sayamount” action。Broadcasting the return value which have been stored in the global variability named “R1” from HTTP。

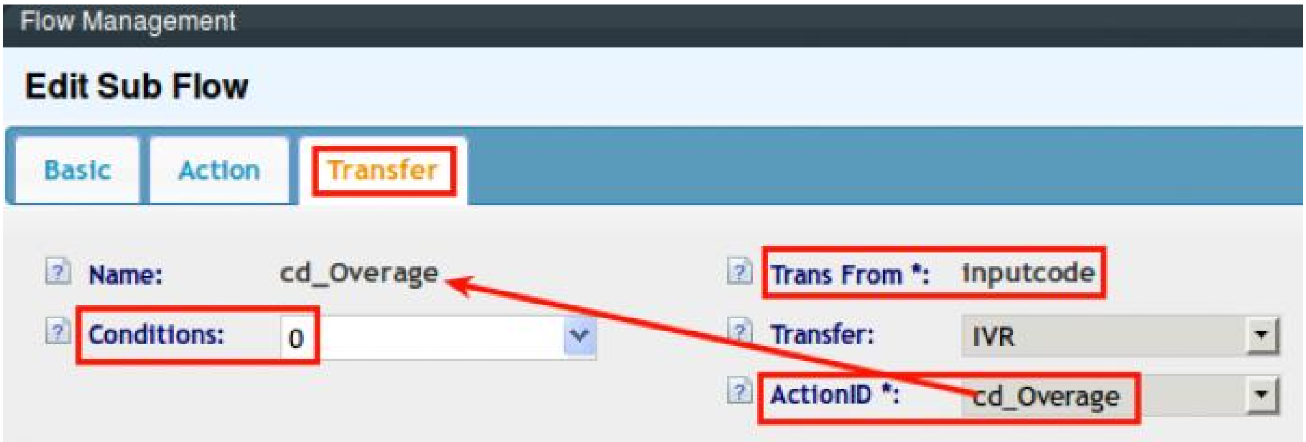


3).Add “ReadData” action。You can hear “You should press 0 if you want to listen again”。



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"。

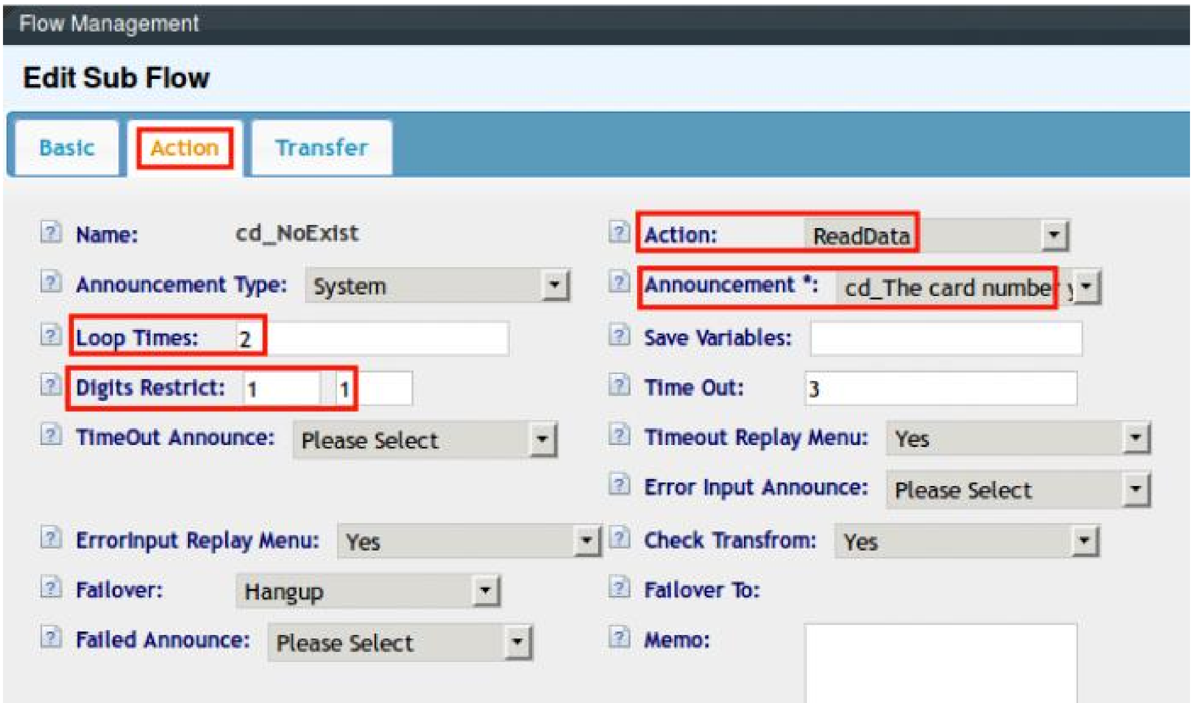


6.Add the "Fourth Sub IVR Flow"

In the transfer of "the Second Sub IVR Flow", When the "inputcode" is 0, it will turn to this flow。

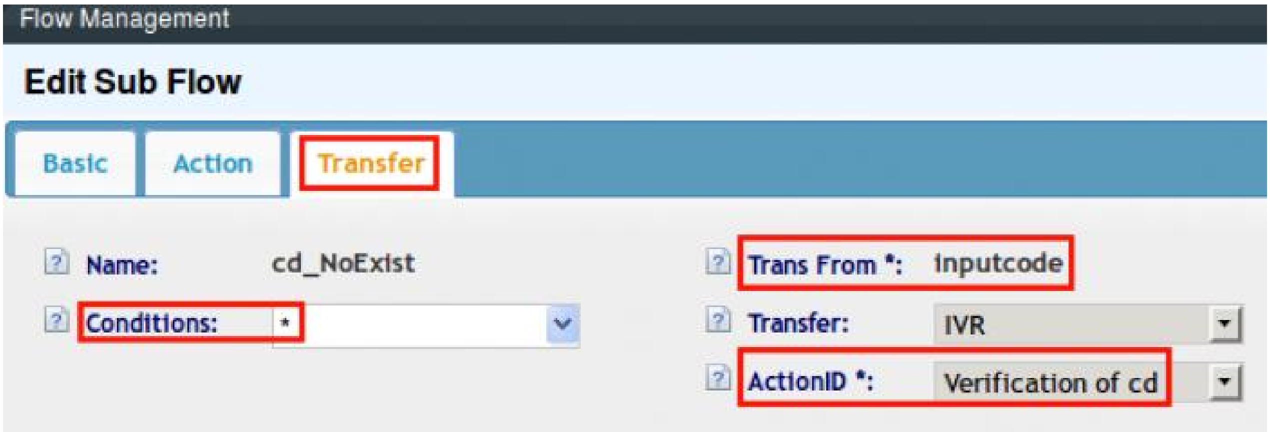
6.1 Action

Add "ReadData" action, you can hear "The card number you entered does not exist, press * if you want to re-enter"。



6.2Transfer

When "inputcode" get * in above "ReadData" action，it will turn to the most beginning-"Main IVR Flow" named "Verification of cd"。



26.12 How to build a voice broadcasting to IVR systtem

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

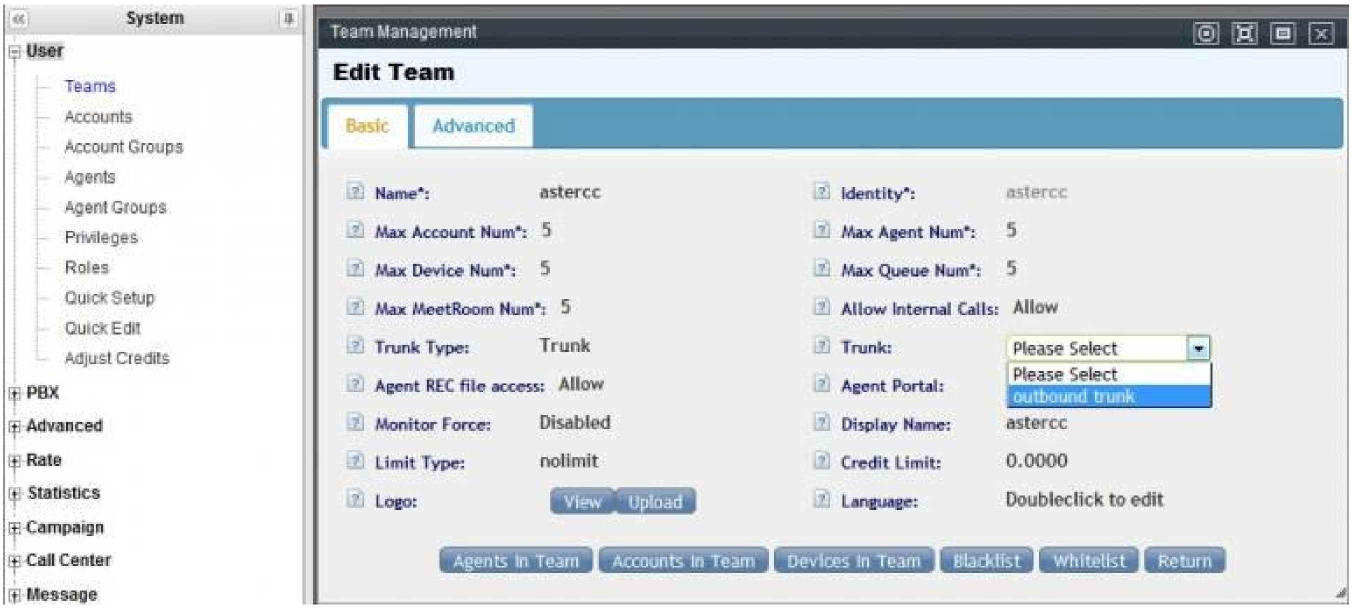
2.Adding Trunk

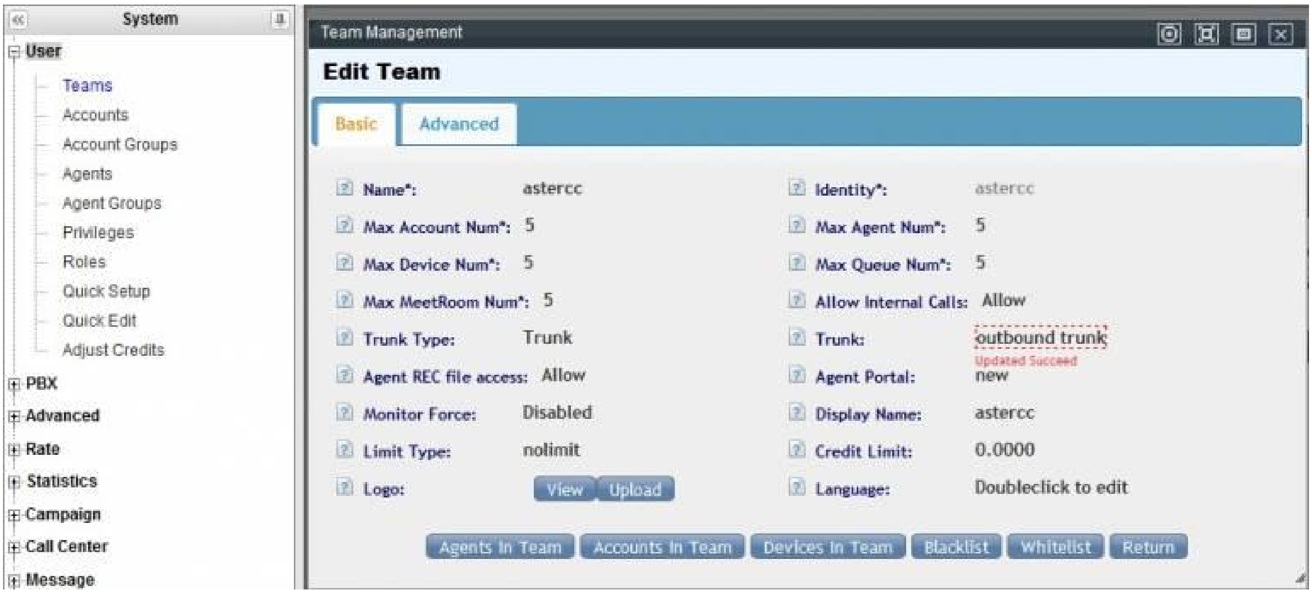
- Please refer to: Adding Trunk, configuring_a_trunks, and build a trunk for campaign.

3.Outbound Testing

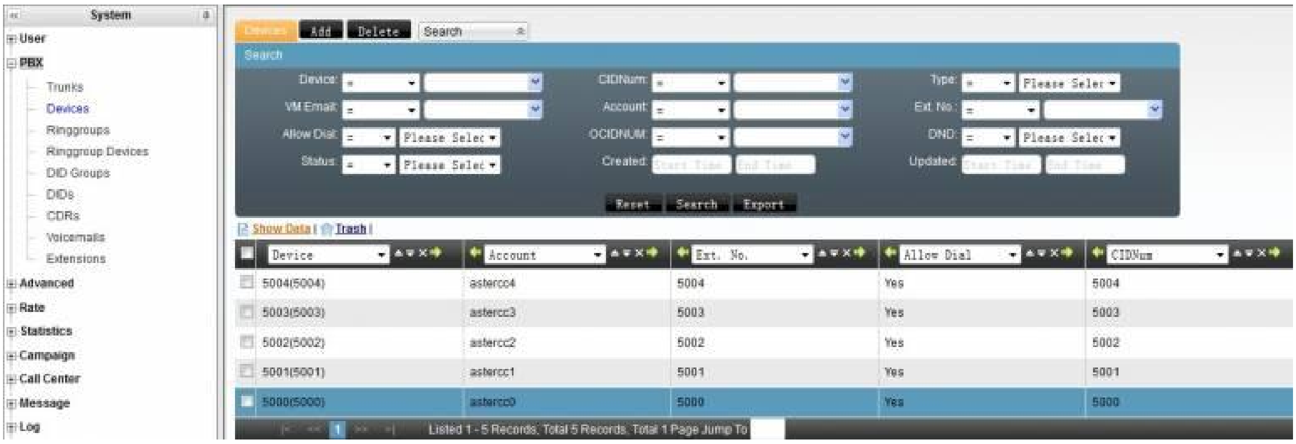
Now we can test if the extension of the team can call

- Assign the trunk to the team, and make all calls placed by this team go 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

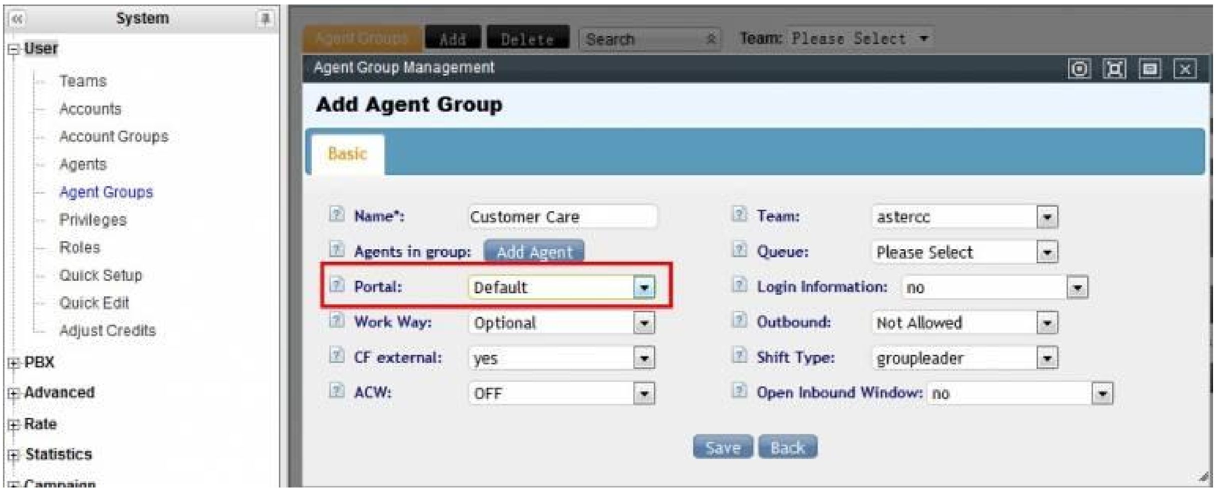


- Register a softphone
- Try to make calls. If there is a problem, review the settings of the trunk.

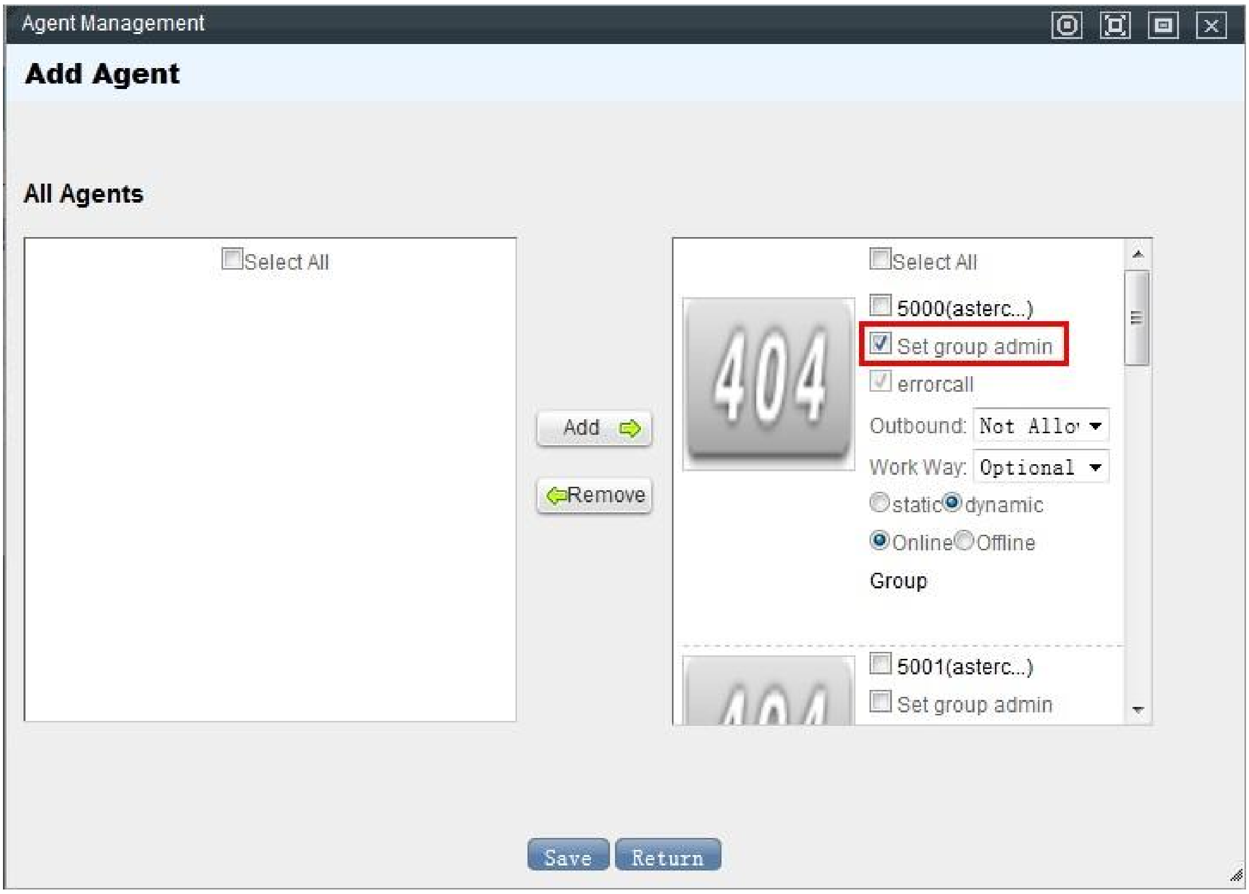
3.Creating an Agent Group

To put in place a better service, you will need to build an agent group to answer the customers who need operator services.

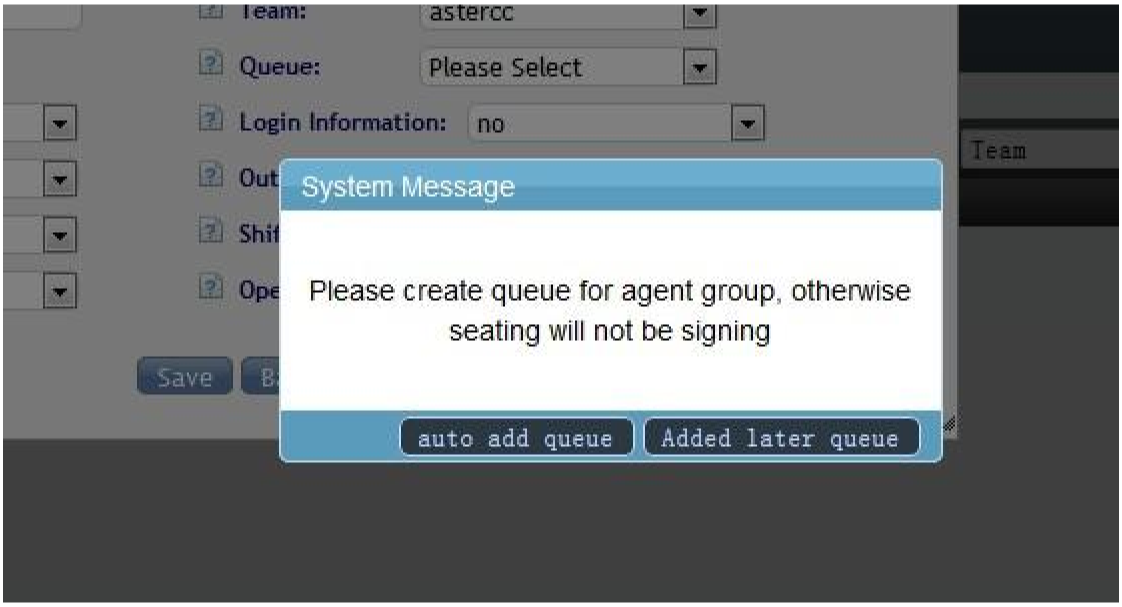
- In the menu on the left, choose User→Agent Groups,and *Add* agent group.
- Portal: When agents login the agent interface, the system will open a page by default. Here we choose *default*.



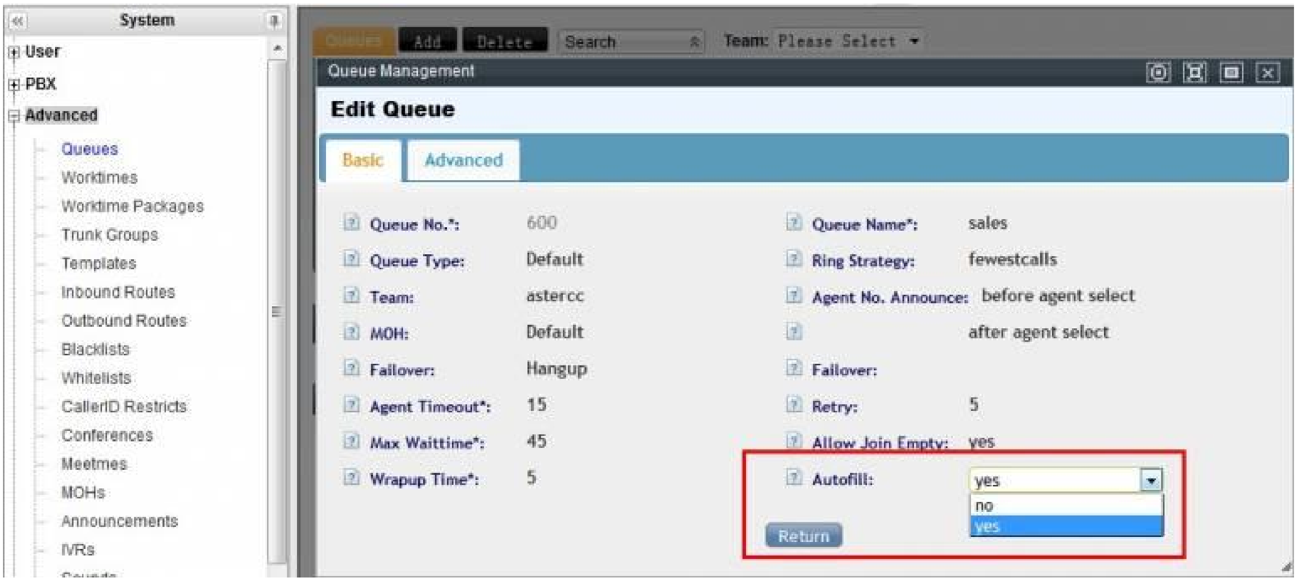
- Click [Add Agent], and select the agents into the group, then save.
  - Here we assign agent number 5000 the monitor of the group.



- 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.

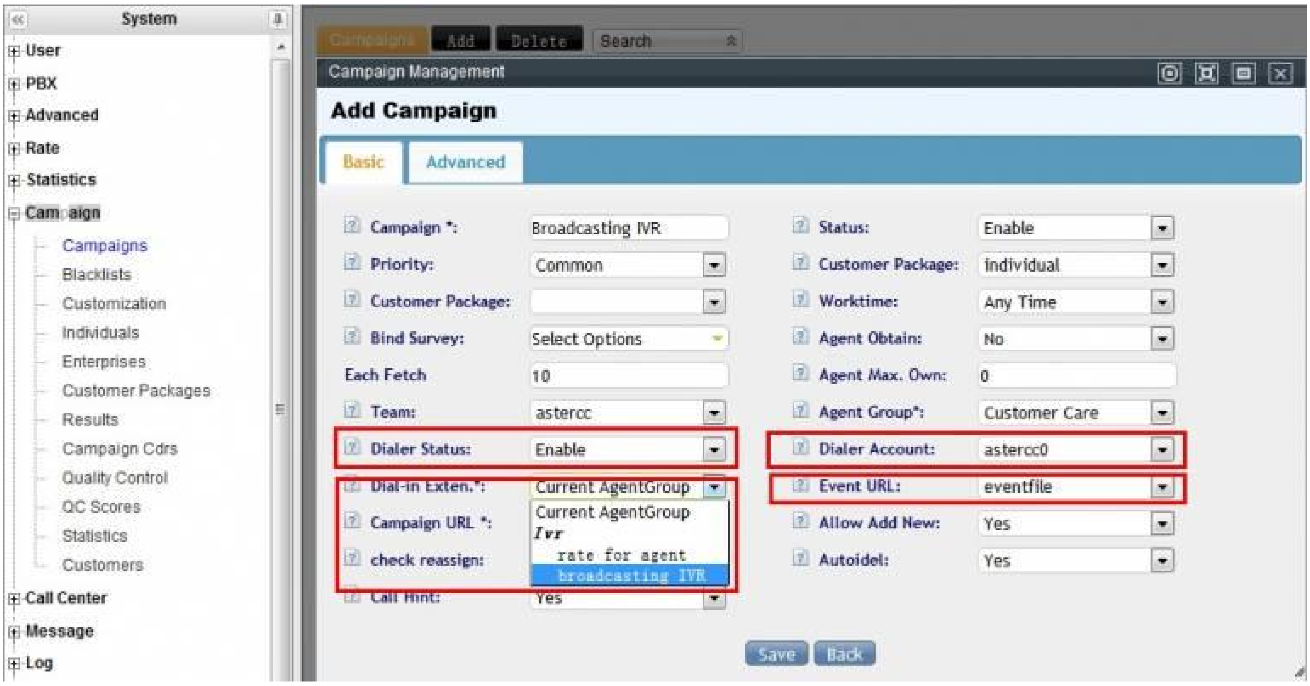


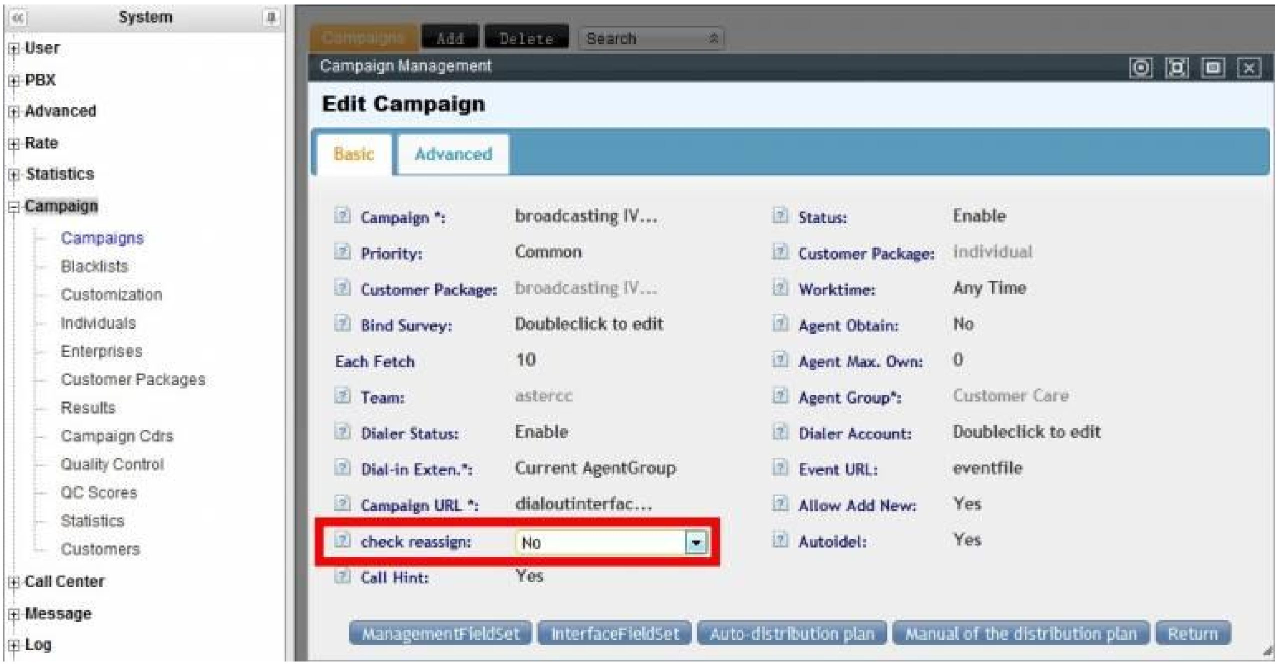
4.Add an IVR

Please refer to configuring_a_simple_ivr

5.Add Campaign

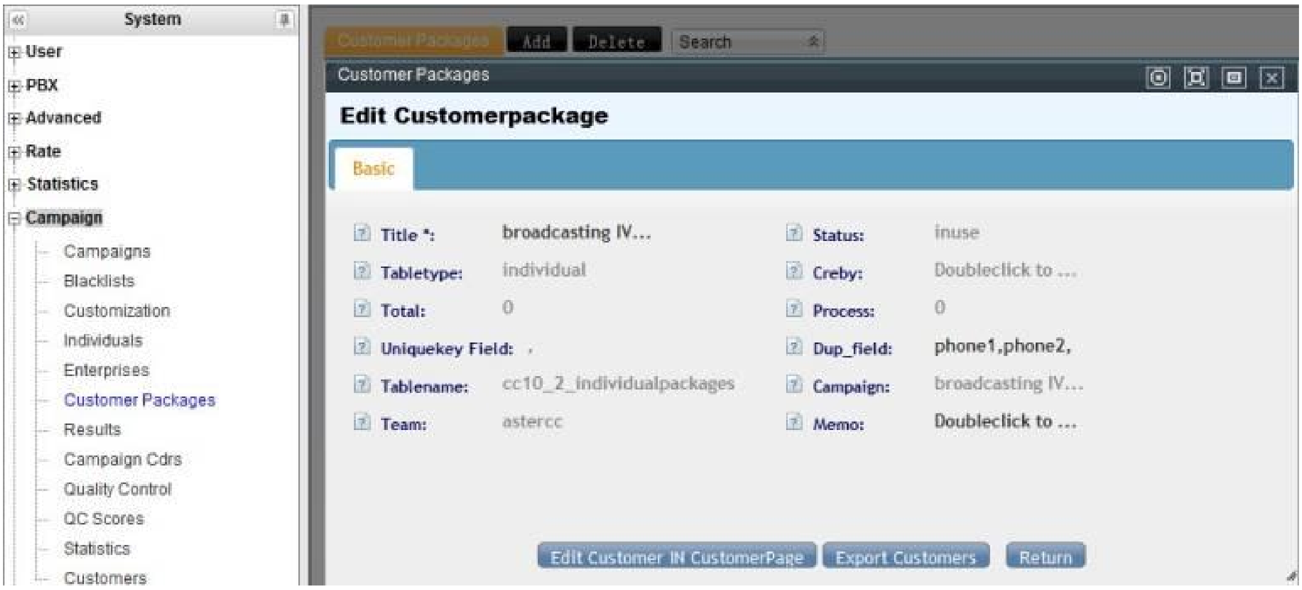
- Campaign→ Campaigns→ Campaign management
- Add a campaign, Dialer Status-Enable, Campaign URL: IVR … Broadcasting IVR
  - Event URL- Event file
  - In pre-dialer, we don't assign customers to agents, so we need to choose *no* after *check reassign*.





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



6.Config Dict

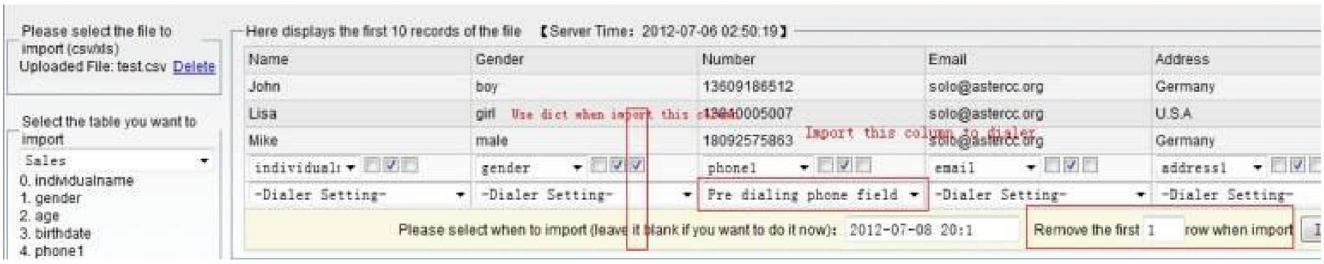
To unify the data format, the system supports dictionary matching. Here we take gender as an example to show you how to match the dictionary.

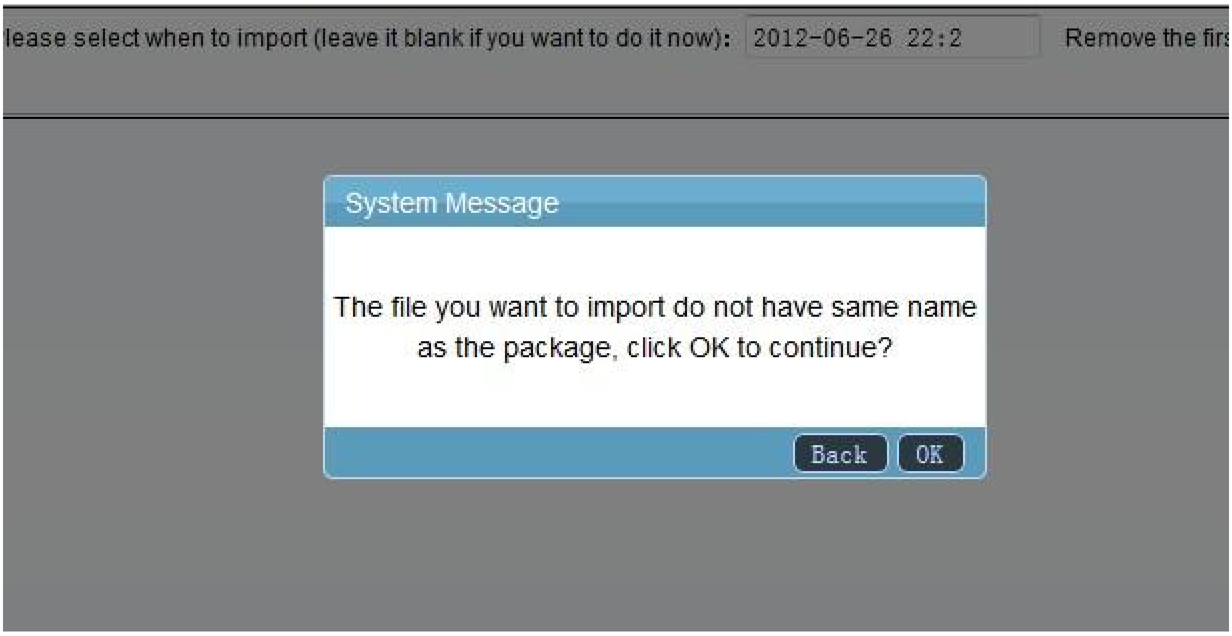
- In the menu on the left, Call center→ Import dict, and *Add* male and female

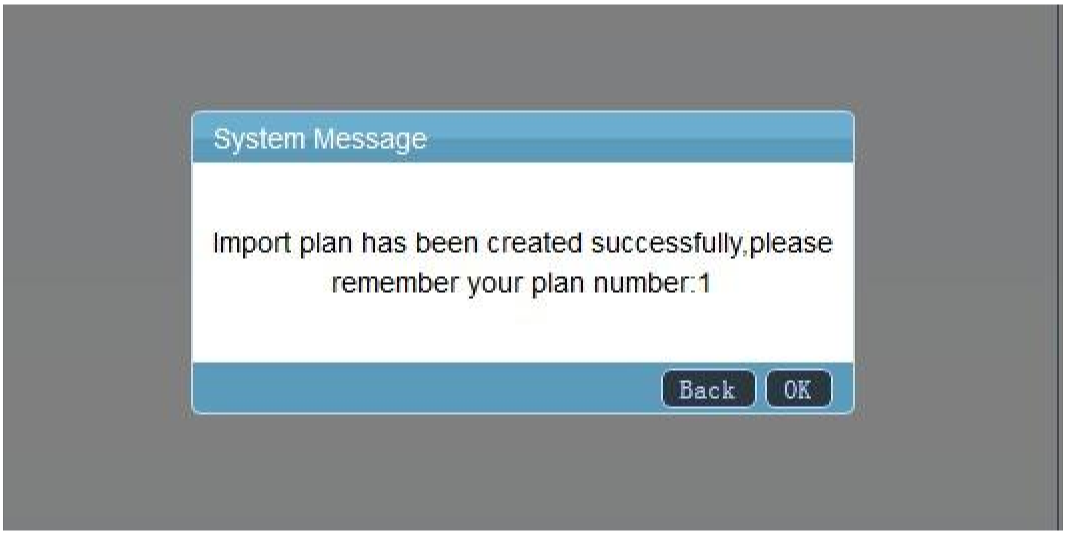
7.Import

- 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 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



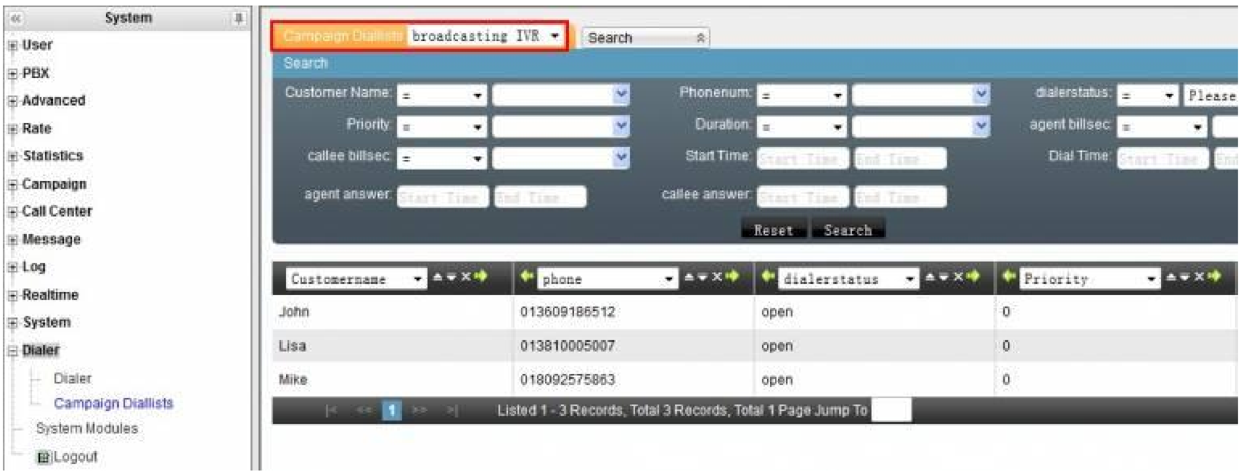




- Go in Call Center→ Shell Import Jobs to see the job you just have just done
    - This is usually finished in two minutes. You can hit refresh in your navigation bar if you want.

8.Predictive Dialer

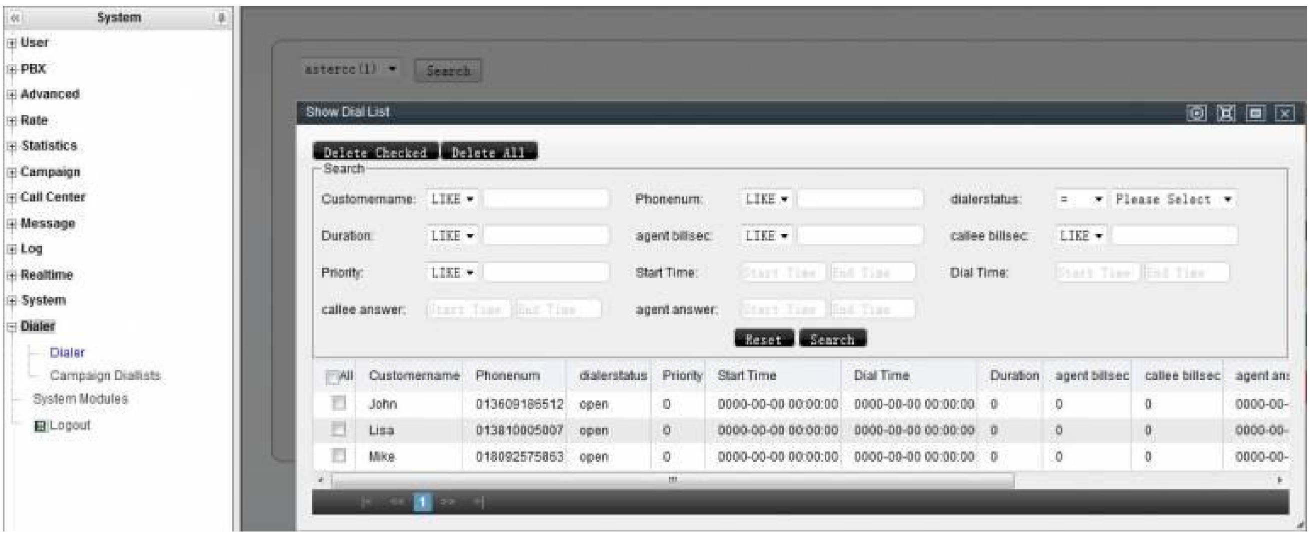
- Go in Dialer→ Campaign Diallist. Here you can see the numbers that are to be dialed.



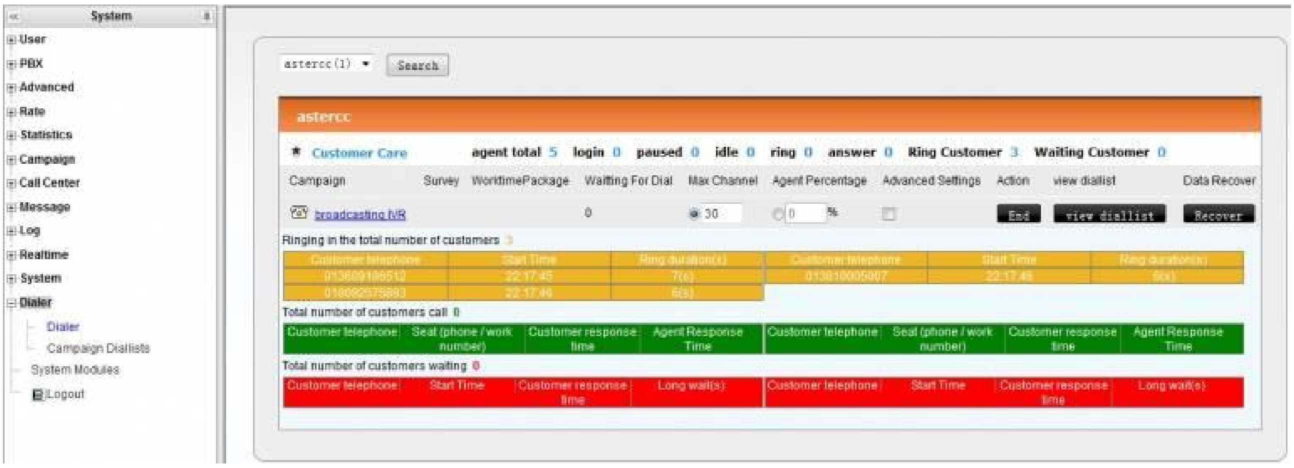
- In Dialer→ Dialer, click the Campaign name to see see how the dialer is progressing.

- 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.



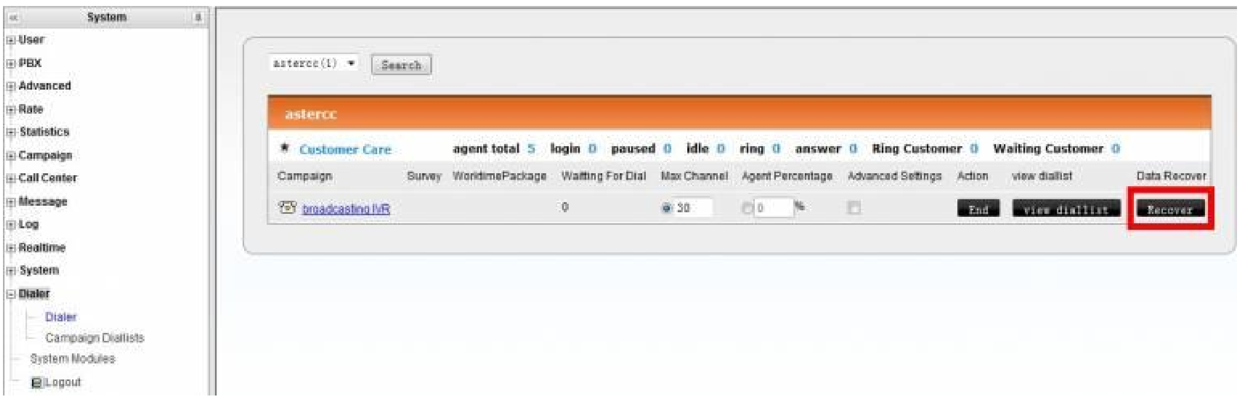
- Click [Start] and the dialer and the system will automatically start doing its work
    - In the dialer page we can see the work related to the dialer going on.



9.Number Recyle

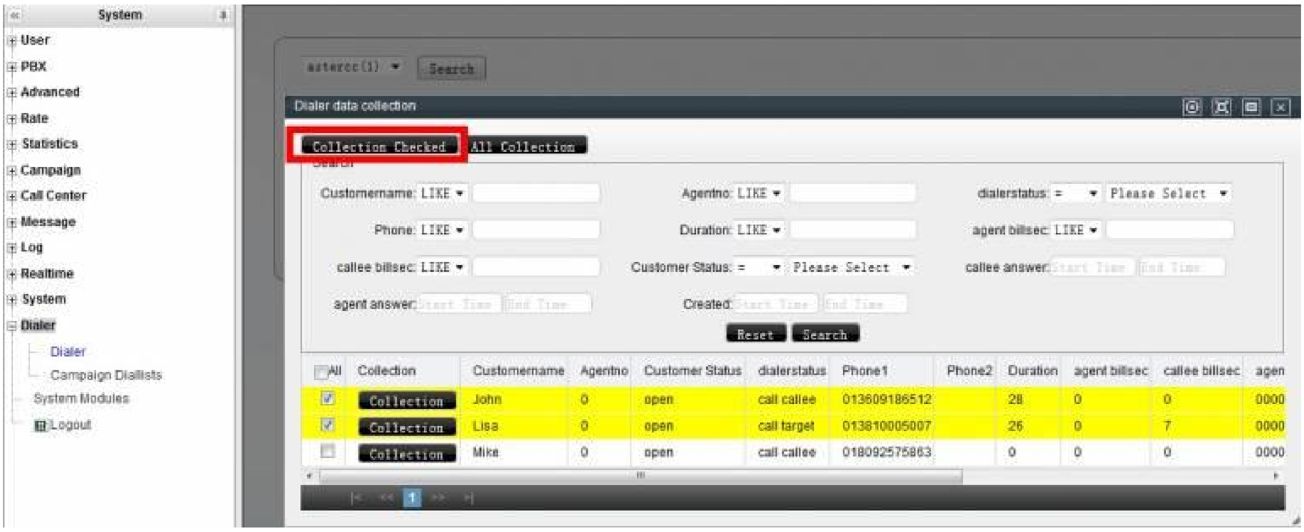
Predialer has a recycle function. You can re-add the numbers that have already been dialed. The system will then be able to re-dial them again.

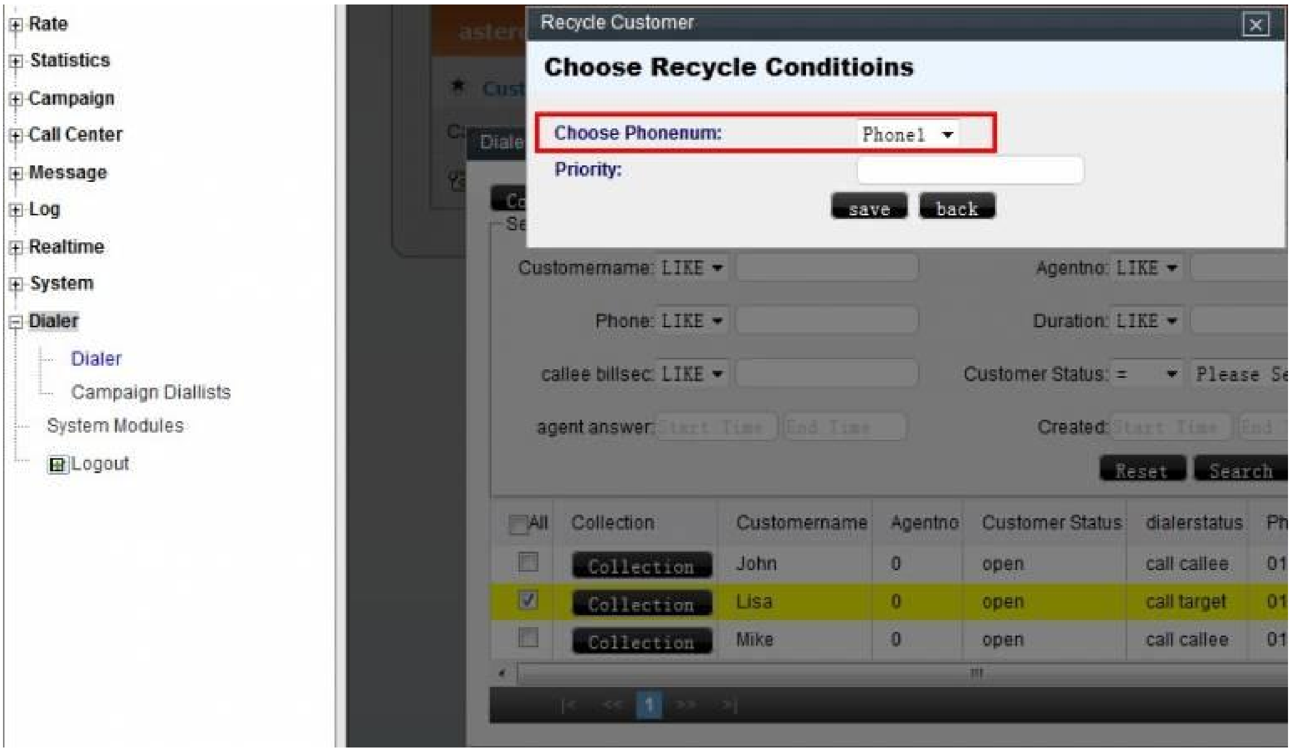
- Dialer→ Dialer, click [recover]



- In the check-boxes, mark the the data that needs to be recycled. Then click [collection checked]

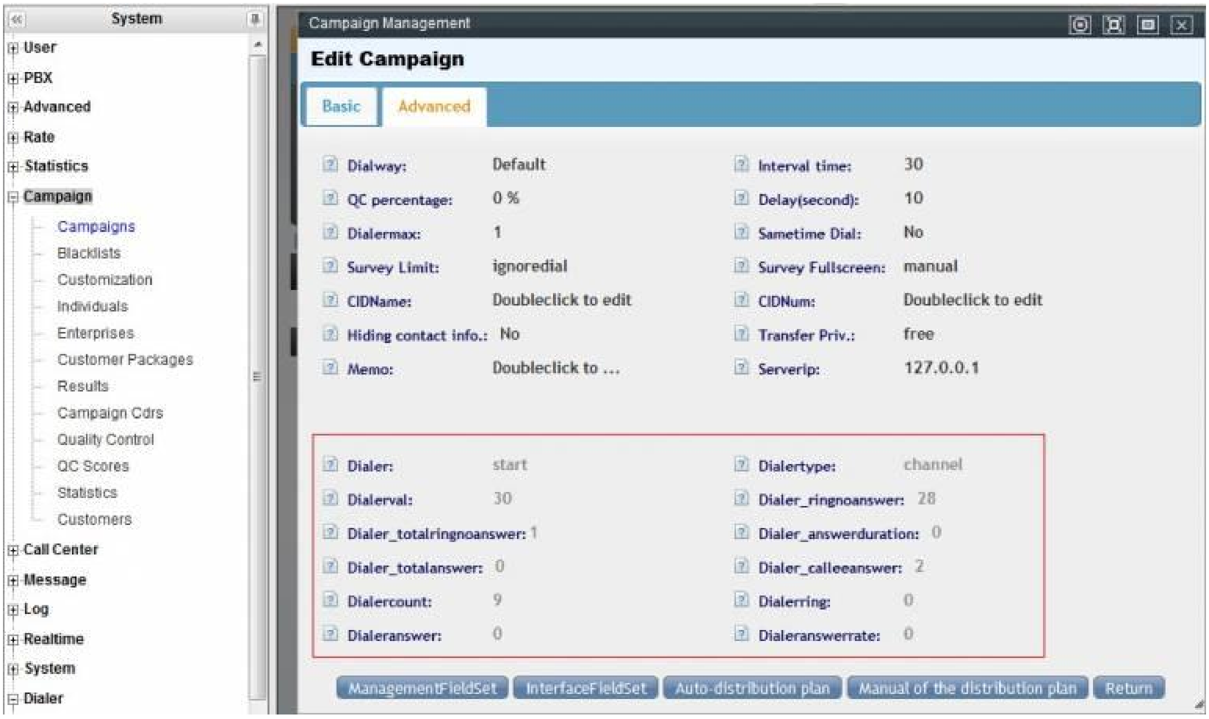
- There are numbers in a package, therefore the system will ask you which set of numbers is to be recycled.



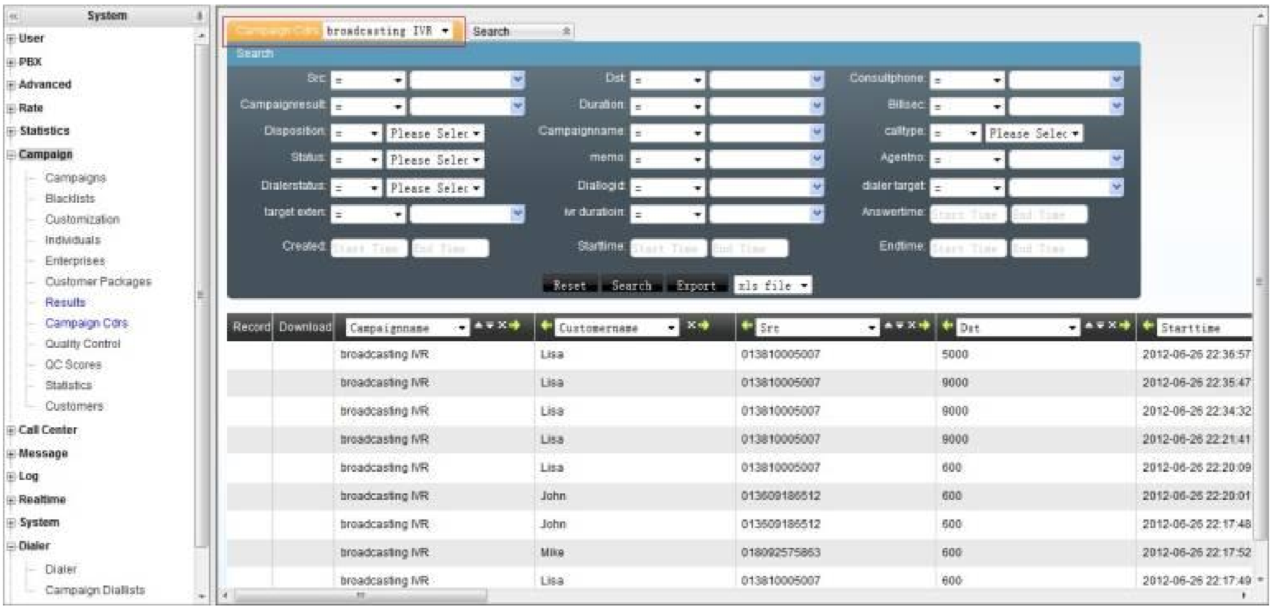


10.Report

- Campaign→Campaigns, and double click campaign and *advanced*, you can see the stats of predialer campaign.



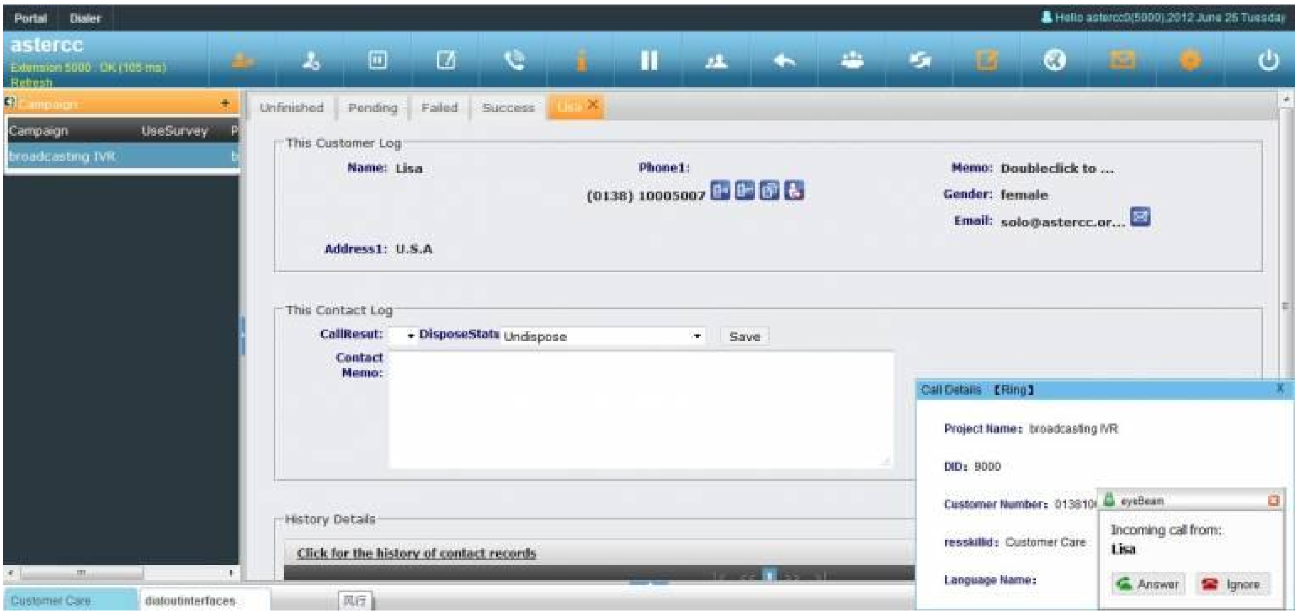
- In Campaign→ Campaign Cdrs, you can see the detailed call records
  - Choose the campaign you want to check on the top first



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.

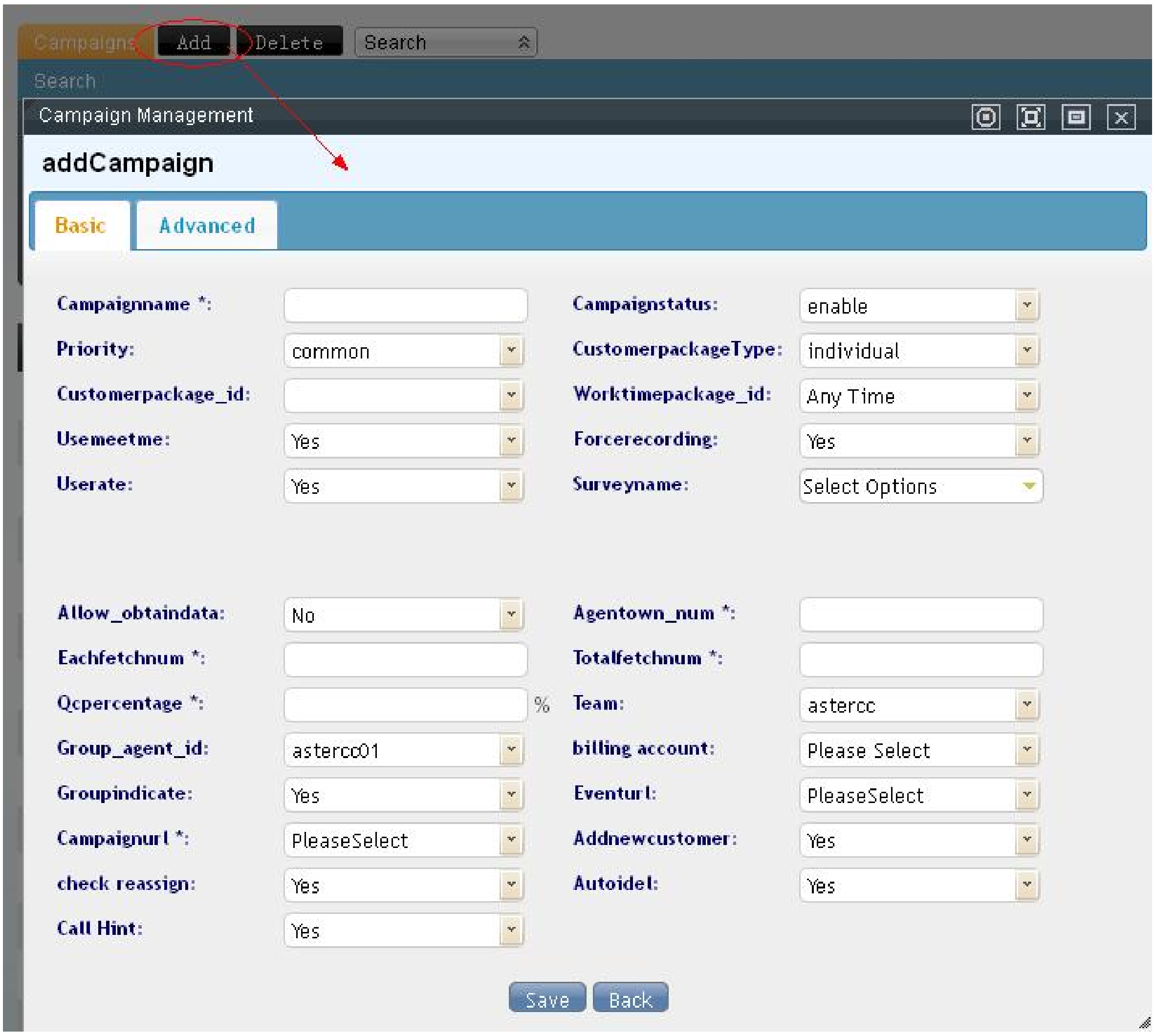


26.13 How to Use Predictive Dialer in a Campaign

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 Compaign

At the system management interface, click "add" at the "Compaigns" page. Then start to configure it:



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.

Compaign 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 compaign 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 compaign 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 compaign.

More detailed settings to be completed in the "Advanced" menu.

Click【save】and a compaign is set up. The new compaign appears on the first line of the data list. Double-click the piece of data to edit.

Add a dial list

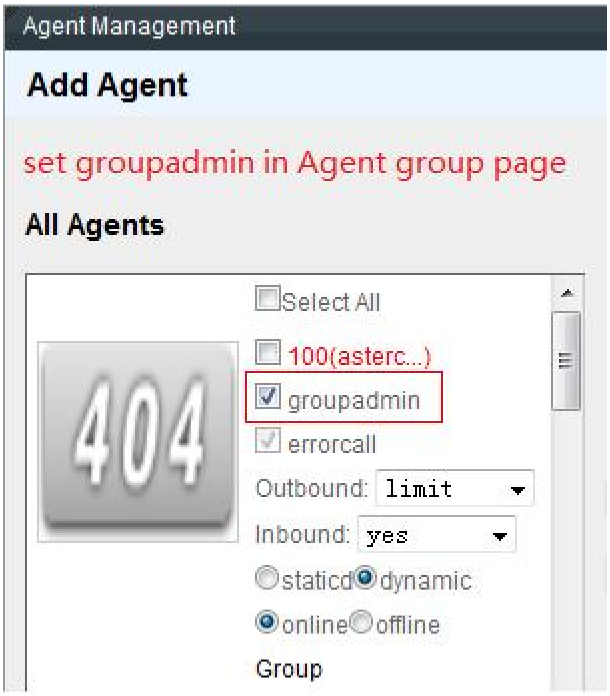
We have chosen the customer package type in the previous process. If no customer package has been assigned, the system would generate a customer package which has the same name as the compaign name.

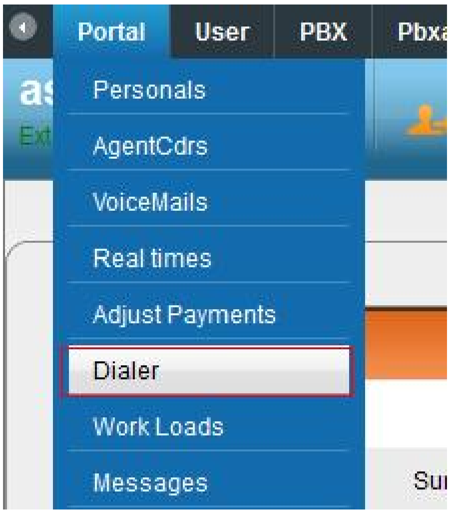
Add customer information and import dial list into this package. You can check the dial list in the dialer interface of the agent's work interface.

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 agant's work interface as a **groupadmin**:





"Sxxssx" is the compaign 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 compaign. 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.

Recycle: you can get the telephone numbers of the customers in the compaign back into dial list when the dial list is empty and keep on dialing.

After the settings are done, click Start to start the predial, and the telephone numbers on the list would be automatically dialed.

★ astercc02 agent total 4 login 2 paused 1 idle 0 ring 0 answer 1

Campaign	Survey	WorktimePackage	Waitting For Dial	Max Channel	Agent Percentage	Advanced Settings	Action	view diallist	Data Recover
dialer			0	4	0 %		Start	view diallist	Recover
predictive-dialer			0	8	0 %		End	view diallist	Recover

Ringing in the total number of customers 1

Customer telephone	Start Time	Ring duration(s)
13810005002	2012-04-05 14:33:40	0

Total number of customers call 1

Customer telephone	Seat (phone / work number)	Customer response time	Agent Response Time
13810005003	2227/2227	2012-04-05 14:30:42	2012-04-05 14:30:58

Total number of customers waiting 7

Customer telephone	Start Time	Customer response time	Long wait(s)
13810005006	2012-04-05 14:31:40	2012-04-05 14:32:01	99
13810005001	2012-04-05 14:33:10	2012-04-05 14:33:31	9
13810005007	2012-04-05 14:31:40	2012-04-05 14:32:01	99
13810005009	2012-04-05 14:32:05	2012-04-05 14:32:26	74
13810005010	2012-04-05 14:32:05	2012-04-05 14:32:26	74
13810005005	2012-04-05 14:31:40	2012-04-05 14:32:01	99
13810005008	2012-04-05 14:31:40	2012-04-05 14:32:01	99

The numbers in the yellow table are the ones being ringing, the ones in the green table are the calls which are on the phone, and the ones in the red table are which had been answered.

Information like ring duration, customer & agant response time, wait time etc are all clearly on the table.

Generating the data of the statement

We can check the agents' performance, agent stats and other data in the statement.

Statement of the agents' performance:

Agent Group: Total Agent: Total TimeMode: ByTotal View export xls

agentno	Dialout Count	CallOutThrnum	averageDialOutAnswered	averageDialOutDst	dialoutBillsec
5009	237	133	00:00:56	00:00:19	02:05:29
5013	89	51	00:00:52	00:00:20	00:44:47
5024	197	142	00:00:55	00:00:20	02:11:25
5003	184	121	00:01:09	00:00:20	02:20:23
5021	244	150	00:00:38	00:00:19	01:36:47
5010	221	122	00:01:05	00:00:18	02:13:16
5001	264	151	00:00:41	00:00:17	01:44:25
5012	108	67	00:01:22	00:00:21	01:32:23
5022	170	102	00:01:09	00:00:20	01:58:10
5008	202	131	00:01:08	00:00:18	02:29:36
5005	184	122	00:01:17	00:00:18	02:37:53
5011	124	67	00:01:02	00:00:17	01:10:17
5039	122	68	00:01:03	00:00:16	01:12:09
5034	242	126	00:00:55	00:00:18	01:57:01
5002	189	92	00:01:03	00:00:21	01:36:39

Statement of agent stats:

Select AgentGroup: Total TimeMode: ByTotal View export xls

AgentGroupName	dialoutcount	dialoutansweredcount	DialoutAnsRate	DialoutAvgRingSec	DialoutAvgAnsSec	dialoutbillsec
[illegible]	4326	2555	59%	00:00:19	00:01:02	44:04:54
[illegible]	5227	2094	40%	00:00:23	00:00:52	30:00:15
[illegible]	5978	3419	57%	00:00:22	00:01:08	64:36:41
[illegible]	5475	3188	58%	00:00:19	00:01:10	61:46:01
[illegible]	5312	3138	59%	00:00:19	00:01:08	59:18:57
[illegible]	6622	3079	46%	00:00:20	00:01:13	62:39:11
[illegible]	8397	4127	49%	00:00:20	00:01:04	73:55:51
[illegible]	6279	3462	55%	00:00:19	00:01:05	62:55:13
[illegible]	6584	3559	54%	00:00:20	00:01:05	63:46:27
[illegible]	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	agentnc	agentgroup	Dialout Count	CallOut	averageDial	average	dialoutB	consultNu	average	Confere	averageCor
2	5009	asterco	250	139	00:00:55	00:00:1	02:09:07	0	00:00:0	0	00:00:00
3	5013	asterco	89	51	00:00:52	00:00:2	00:44:47	0	00:00:0	0	00:00:00
4	5024	asterco	208	145	00:00:55	00:00:1	02:14:25	0	00:00:0	0	00:00:00
5	5003	asterco	193	126	00:01:10	00:00:2	02:27:42	0	00:00:0	0	00:00:00
6	5021	asterco	254	158	00:00:38	00:00:1	01:41:32	0	00:00:0	0	00:00:00
7	5010	asterco	229	127	00:01:06	00:00:1	02:20:39	0	00:00:0	0	00:00:00
8	5001	asterco	277	159	00:00:41	00:00:1	01:49:13	0	00:00:0	0	00:00:00
9	5012	asterco	108	67	00:01:22	00:00:2	01:32:23	0	00:00:0	0	00:00:00
10	5022	asterco	179	108	00:01:09	00:00:2	02:04:51	0	00:00:0	0	00:00:00
11	5008	asterco	207	133	00:01:09	00:00:1	02:34:59	0	00:00:0	0	00:00:00
12	5005	asterco	193	129	00:01:16	00:00:1	02:45:15	0	00:00:0	0	00:00:00
13	5011	asterco	124	67	00:01:02	00:00:1	01:10:17	0	00:00:0	0	00:00:00
14	5039	asterco	122	68	00:01:03	00:00:1	01:12:09	0	00:00:0	0	00:00:00
15	5034	asterco	247	131	00:00:55	00:00:1	02:01:54	0	00:00:0	0	00:00:00
16	5002	asterco	196	97	00:01:04	00:00:2	01:43:34	0	00:00:0	0	00:00:00
17	5017	asterco	210	136	00:01:02	00:00:1	02:22:33	0	00:00:0	0	00:00:00
18	5016	asterco	201	104	00:01:24	00:00:1	02:26:28	0	00:00:0	0	00:00:00
19	5023	asterco	161	101	00:01:29	00:00:1	02:29:49	0	00:00:0	0	00:00:00
20	5006	asterco	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	asterco	4463	2646	59%	00:00:19	00:01:02	45:30:33	0	00:00:00	0	00:00:00
3	asterco	9383	4811	51%	00:00:26	00:01:55	153:09:18	0	00:00:00	0	00:00:00
4	asterco	15556	7961	51%	00:00:26	00:02:25	321:10:26	0	00:00:00	0	00:00:00
5	asterco	5227	2094	40%	00:00:23	00:00:52	30:00:15	0	00:00:00	0	00:00:00
6	asterco	18225	9105	50%	00:00:26	00:02:19	350:34:19	0	00:00:00	0	00:00:00
7	asterco	26137	13279	51%	00:00:25	00:01:39	364:58:48	0	00:00:00	0	00:00:00
8	asterco	5978	3419	57%	00:00:22	00:01:08	64:36:41	0	00:00:00	0	00:00:00
9	asterco	5475	3188	58%	00:00:19	00:01:10	61:46:01	0	00:00:00	0	00:00:00
10	asterco	18436	9548	52%	00:00:25	00:01:57	309:44:04	0	00:00:00	0	00:00:00
11	asterco	19208	9934	52%	00:00:25	00:02:00	332:12:55	0	00:00:00	0	00:00:00
12	asterco	5312	3138	59%	00:00:19	00:01:08	59:18:57	0	00:00:00	0	00:00:00
13	asterco	6622	3079	46%	00:00:20	00:01:13	62:39:11	0	00:00:00	0	00:00:00
14	asterco	18668	9785	52%	00:00:24	00:02:04	337:28:50	0	00:00:00	0	00:00:00
15	asterco	8397	4127	49%	00:00:20	00:01:04	73:55:51	0	00:00:00	0	00:00:00
16	asterco	14903	8720	59%	00:00:24	00:01:54	276:50:38	0	00:00:00	0	00:00:00
17	asterco	6279	3462	55%	00:00:19	00:01:05	62:55:13	0	00:00:00	0	00:00:00
18	asterco	12212	6878	56%	00:00:23	00:02:42	310:18:47	0	00:00:00	0	00:00:00
19	asterco	6584	3559	54%	00:00:20	00:01:05	63:46:27	0	00:00:00	0	00:00:00
20	asterco	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.