

How to Setup Predictive Dialer Setup

Ecsow Predictive Dialer offers the following key features:

VOIP Predictive Dialing—No need for physical phone lines, Dialogic board or voice modem. Calls are made through Internet VoIP.

Remote Agent—Agent can work at home or office. Calls are forwarded to agent's computer over the internet or local area network.

Installing the Predictive Dialer on a Dialing Computer

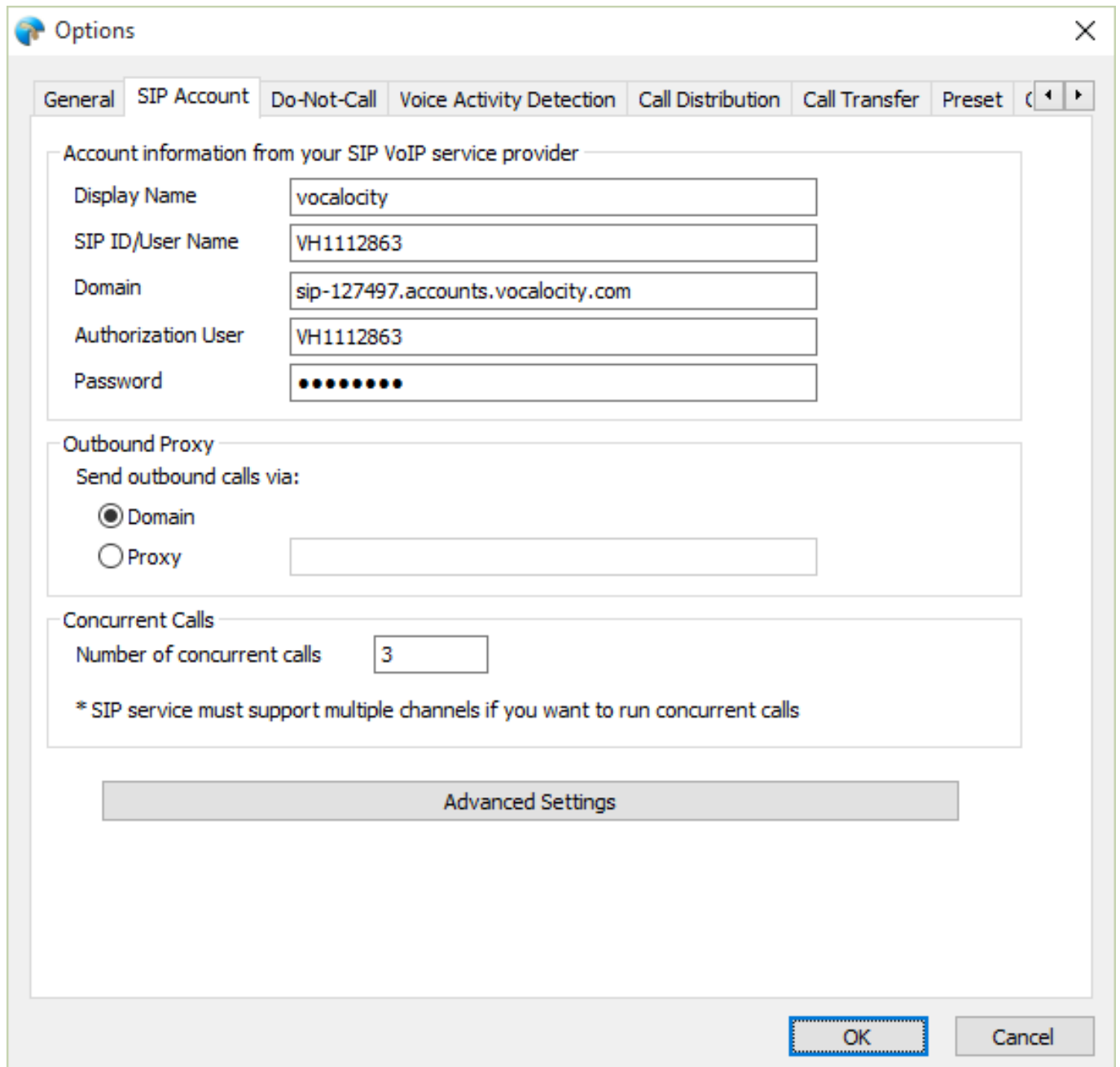
Download Ecsow Predictive Dialer software and follow on-screen instructions to install Predictive Dialer on a computer.

Configuring the phone service

Ecsow software can use several phone services: VOIP phone service (such as SkypeConnect, Vonage, Callcentric, any SIP trunk provider, etc); a PBX system with SIP extensions (such as Cisco, Avaya, Asterisk, etc).

Click Ecsow menu Tools > Options > SIP Account tab to input your SIP account information.

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The 'Options' dialog box is shown with the 'SIP Account' tab selected. The 'Account information from your SIP VoIP service provider' section contains the following fields:

- Display Name: vocalocity
- SIP ID/User Name: VH1112863
- Domain: sip-127497.accounts.vocalocity.com
- Authorization User: VH1112863
- Password: (masked with dots)

The 'Outbound Proxy' section has the 'Domain' radio button selected.

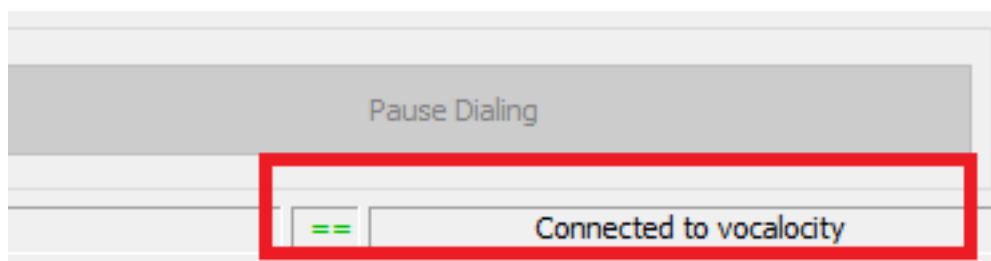
The 'Concurrent Calls' section shows 'Number of concurrent calls' set to 3.

A note states: '* SIP service must support multiple channels if you want to run concurrent calls'.

An 'Advanced Settings' button is located below the concurrent calls section.

The 'OK' button is highlighted with a blue dashed border.

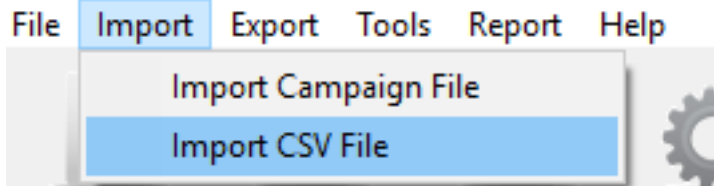
It will show connected to the SIP service on Ecsow main window.



Import call list by click Ecsow menu Import > Import CSV File.

Click the menu Import > Improt CSV file

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You will need to specify which of your columns from your call list will be placed on Predictive Dialer's "Name" and "Phone Number" columns.

A screenshot of the 'Import Contacts' dialog box. The title bar says 'Import Contacts'. Inside, there's a section 'Please specify the index of the column with phone numbers'. Below this, a text box says 'Phone number column (click the column header to select it)' with a dropdown menu showing '7'. A checkbox labeled 'Specify the corresponding relation between fields and the index of the column' is checked. Below this, there are input fields for various fields: 'First name: 1', 'Last name: -1', 'Email: -1', 'WebSite: -1', 'Fax: -1', 'Company: -1', 'Job title: -1', 'Street address: -1', 'City: -1', 'State/province: -1', 'Country/region: -1', and 'ZIP/postal code: -1'. A table below shows the mapping of columns. The table has four columns: 'Column 0', 'Column 1', 'Column 6', and 'Column 7'. The first row of the table shows 'name' under 'Column 1' and 'phone' under 'Column 7'. The subsequent rows show contact data: 'VARATH R...', 'ISMAIL BL...', 'SIVAM NA...', 'HAMZAIDI ...', 'AHMAD AF...', 'NG KIM HONG', 'KHAIRONI ...', 'NIK AZIZO...', and 'ONG BOON FOO'. The 'name' column contains the full name, and the 'phone' column contains the phone number. The 'phone' column has a green checkmark in the header. At the bottom, there's a checkbox 'Don't add a phone number if it already exists' and 'OK' and 'Cancel' buttons.

Click the Start Dialing button to start the predictive dialing.

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The screenshot shows two windows from the Ecsow software. The main window is 'Ecsow Predictive Dialer - Multi-line Edition'. It has a menu bar (File, Import, Export, Tools, Report, Help) and a toolbar with icons for file operations, settings, and call management. Below the toolbar is a table with columns: First Name, Last Name, Phone Number, Notes, Call Disposition, Duration, and Assignee. The table lists 15 contacts. The 'Call Disposition' column shows 'Call Distribute Succeeded' for most, and 'Call Distribute Failed' for one. The 'Assignee' column shows 'Todd' and 'Melvin'. Below the table are buttons for 'Automatic Dialing', 'Stop Dialing', and 'Pause Dialing'. The status bar at the bottom shows the file path 'C:\Users\Q\Documents\Ecsow\Campaign-2016-01-08_14-31-09.xml' and 'Connected to vocalocity'.

	First Name	Last Name	Phone Number	Notes	Call Disposition	Duration	Assignee
1	Gregory	Oenning	(480) 214-5461		Call Distribute Succeeded	00:00:13	Todd
2	Tiffanie	Oenning	(480) 214-5670		Call Distribute Succeeded	00:00:28	Melvin
3	Justin	Kohls	(480) 219-1235		Call Distribute Succeeded	00:00:25	Todd
4	Michelle	Kohls	(480) 219-3199		Call Distribute Succeeded	00:00:28	Melvin
5	Justin	Kohls	(480) 219-5796		Call Distribute Failed	00:00:00	Todd
6	Lori	Beresford	8006947466		Answering Machine Answered		Melvin
7	Thomas	Lenard	(480) 219-6552				
8	Jeff	Bush	(480) 219-8598				
9	Gary	Meador	(480) 209-1296				
10	Ashleigh	Diaz	(480) 209-1353				
11	Melvin	Mccloud	(480) 209-1431				
12	John	Bear	(480) 209-1745				
13	Ken	Bock	(480) 209-1780				
14	Todd	Beaudoin	(480) 214-3395				
15	Allen	Rice	(480) 214-3816				

The second window is 'Agent Manager'. It shows a status indicator (green checkmark) and a user name 'Todd Melvin'. There are buttons for '+', '-', and 'Apply Settings'.

Please note you need to specify 1 for US phone number, where 1 is the country code. You can set this at Ecsow menu Tools > Options > General tab.

Once a call is answered by a live human, the call is transferred to an available agent; on the agent's computer, an alert window (screen popup) pops up, and the agent can talk to the client right away. The screen popup contains all the information about the client. Here is what the popup window will look like:

The screenshot shows the 'Ecsow Remote Agent - Todd' window. It has a menu bar (File, Tools, Help) and a form for entering client information. The form fields are: First name (Justin), Last name (Kohls), Phone (8006947466), Email, Company, Job title, Address, City (Cave Creek), State (AZ), Country, ZIP, Website, Fax, Other, and Notes. There are buttons for 'Answer', 'End Call', 'Mute', 'Call Back', 'Do Not Call', and 'Save'. A 'Call disposition' dropdown menu is set to 'Answering Distributed Call'. A 'Preset Notes' button is also visible. The status bar at the bottom shows 'Busy' and a timer '00:00:08'.

Field	Value
First name	Justin
Last name	Kohls
Phone	8006947466
Email	
Company	
Job title	
Address	
City	Cave Creek
State	AZ
Country	
ZIP	
Website	
Fax	
Other	
Notes	
Call disposition	Answering Distributed Call

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