

# How to Setup

## How To Use Ecsow Predictive Dialer

### 1, 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.

### 2, 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.

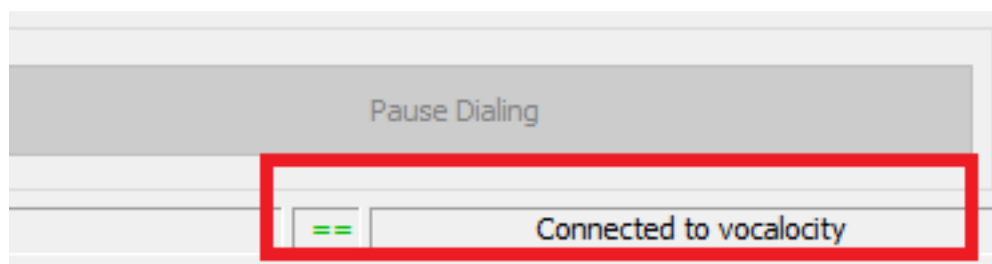
The screenshot shows the 'Options' dialog box with the 'SIP Account' tab selected. The dialog is titled 'Options' and has a close button (X) in the top right corner. The 'SIP Account' tab is active, and the following settings are visible:

- Account information from your SIP VoIP service provider:**
  - Display Name:
  - SIP ID/User Name:
  - Domain:
  - Authorization User:
  - Password:
- Outbound Proxy:**
  - Send outbound calls via:
    - Domain
    - Proxy
- Concurrent Calls:**
  - Number of concurrent calls:
  - \* SIP service must support multiple channels if you want to run concurrent calls

Below the settings is a button labeled 'Advanced Settings'. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

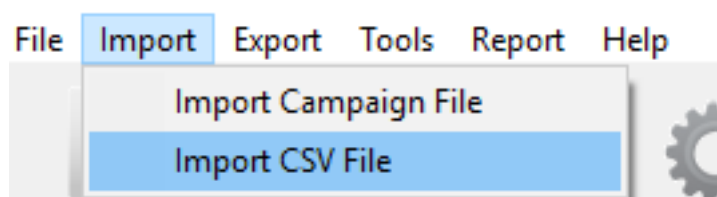
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It will show connected to the SIP service on Ecsow main window.



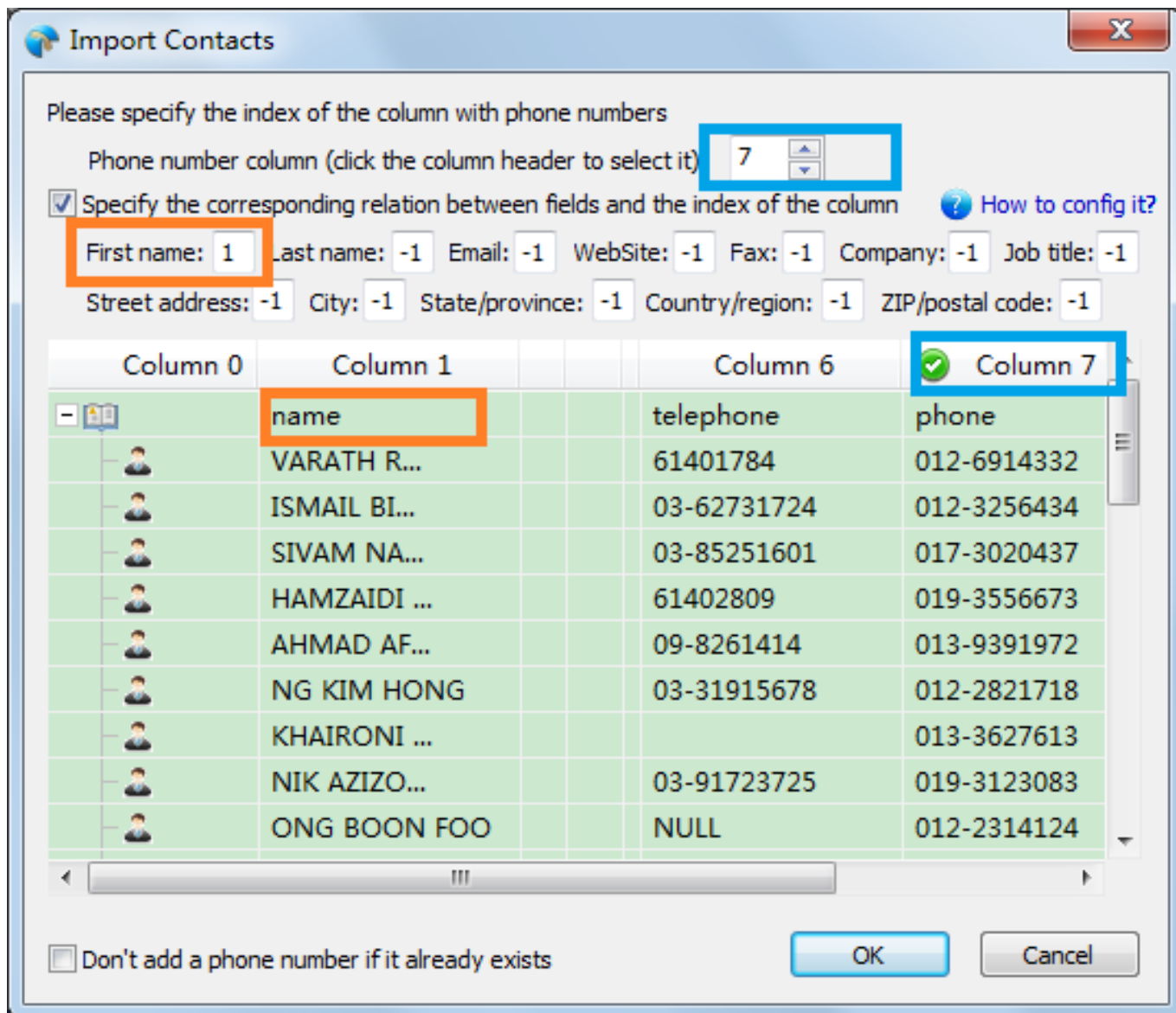
## 3, Import call list by click Ecsow menu Import > Import CSV File.

Click the menu Import > Import CSV file

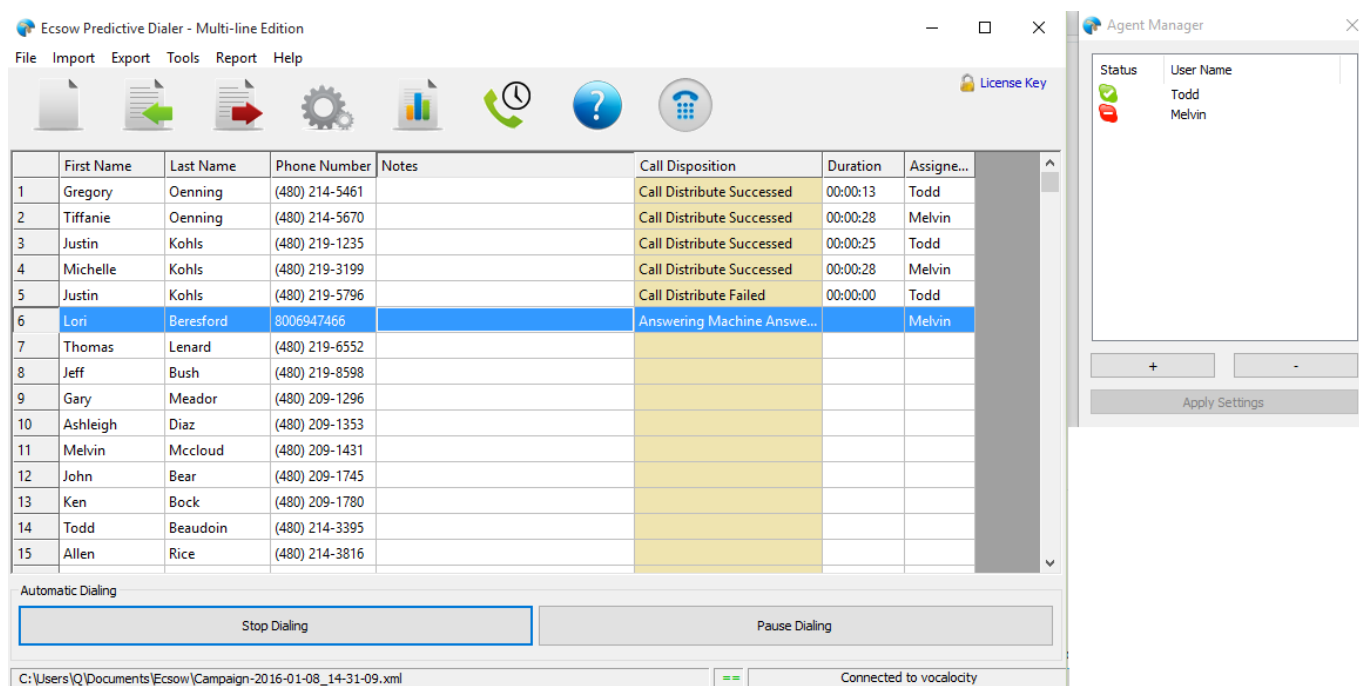


You will need to specify which of your columns from your call list will be placed on Predictive Dialer's "Name" and "Phone Number" columns.

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## 4, Click the Start Dialing button to start the predictive dialing.

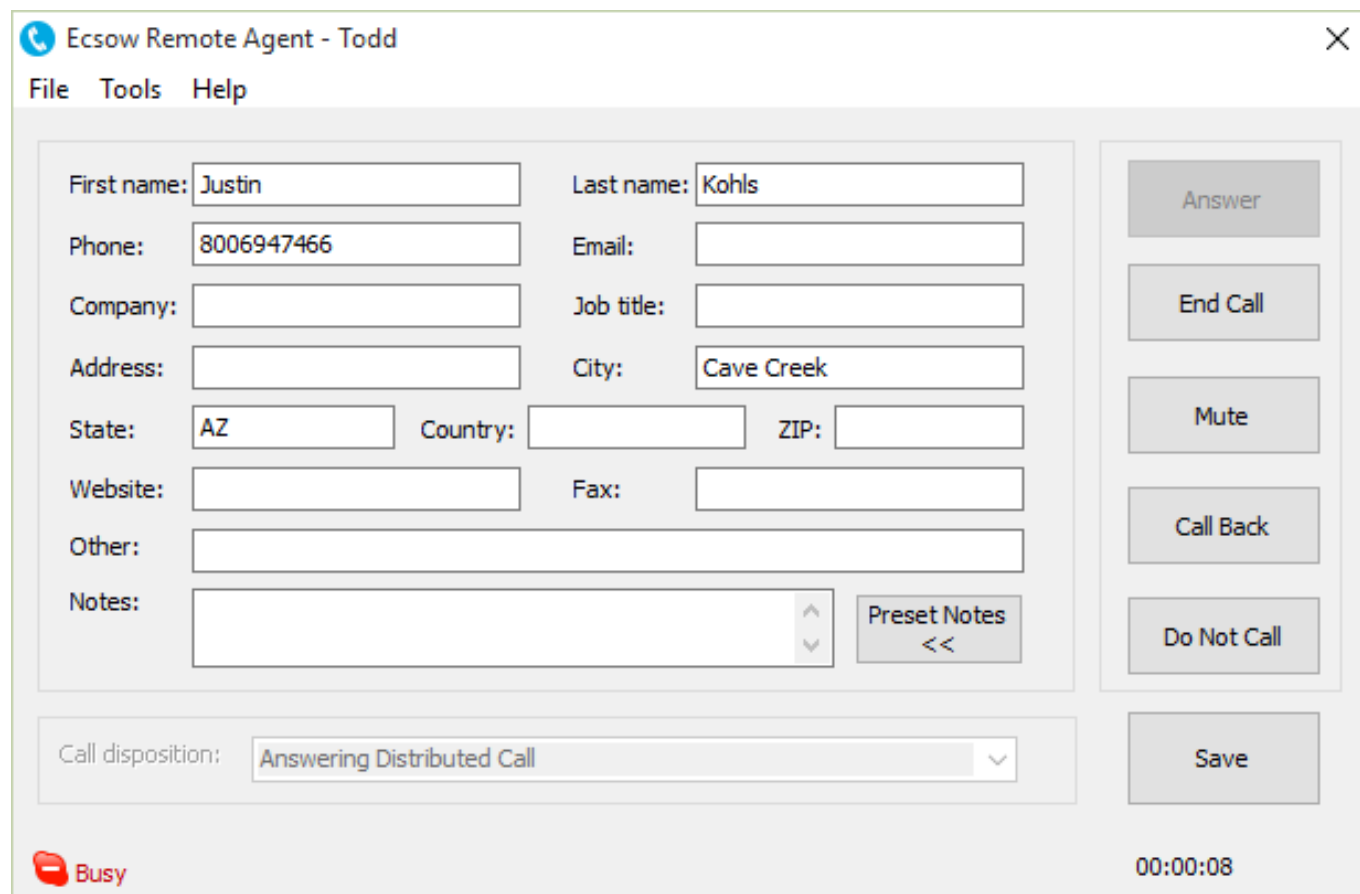


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Please note you need to specify 1 for US phone number, where 1 is the country code. You can set this at Ecsow menu Tools > Options > General tab.

## 5, Auto distribute call to agent.

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 a software window titled "Ecsow Remote Agent - Todd" with a close button (X) in the top right corner. Below the title bar is a menu bar with "File", "Tools", and "Help". The main area is a form for a call agent. On the left, there are input fields for: 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. A "Preset Notes <<" button is next to the Notes field. On the right side, there is a vertical stack of buttons: Answer, End Call, Mute, Call Back, Do Not Call, and Save. At the bottom left, there is a "Busy" indicator with a red phone icon. At the bottom right, there is a timer showing "00:00:08". A "Call disposition:" dropdown menu is set to "Answering Distributed Call".

Unique solution ID: #1007

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