

Broadcast Xact Dialer-Admin Guide

THIS WIKI HAS BEEN UPDATED FOR VERSION 13 OF YOUR PBX GUI

Commercial Module

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Overview

The Broadcast (XactDialer) module allows you to broadcast a message to a predefined list of phone numbers. You can decide to use different messages or destinations based upon whether a person or answering machine/voicemail answers the call.

Terminology:

- **Campaign:** A set of instructions on when to dial, which call group(s) to dial, and where to route the call. Also known as a **Broadcast Campaign**.
- **Call Group:** A list of names and numbers. A campaign can contain one or more call groups.

Logging In

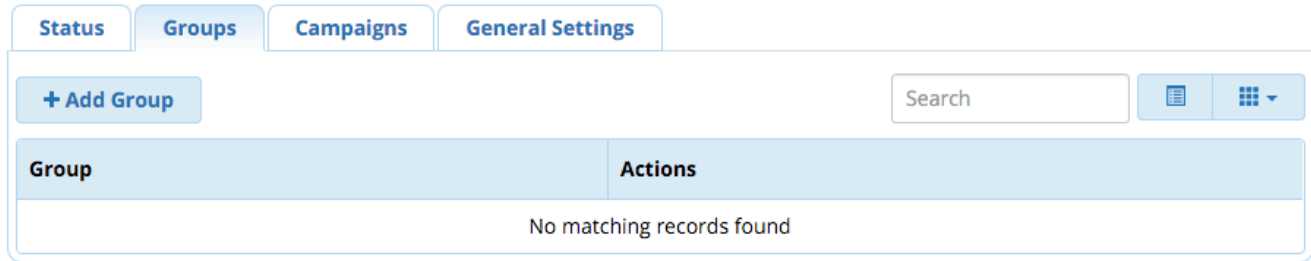
To navigate to the Broadcast module:

- In the top menu, go to **Applications**

- In the drop-down, choose **Broadcast**

You will see a screen like this, landing on the **Groups** tab:

Broadcast Campaigns



The screenshot shows the 'Broadcast Campaigns' interface with the 'Groups' tab selected. At the top, there are four tabs: 'Status', 'Groups', 'Campaigns', and 'General Settings'. Below the tabs is a '+ Add Group' button on the left, a search box with the text 'Search' in the middle, and two icons (a list icon and a grid icon) on the right. The main content area is a table with two columns: 'Group' and 'Actions'. The table is currently empty, displaying the message 'No matching records found' in the center.

In this wiki, we'll go over the tabs from left to right, starting with **Status**.

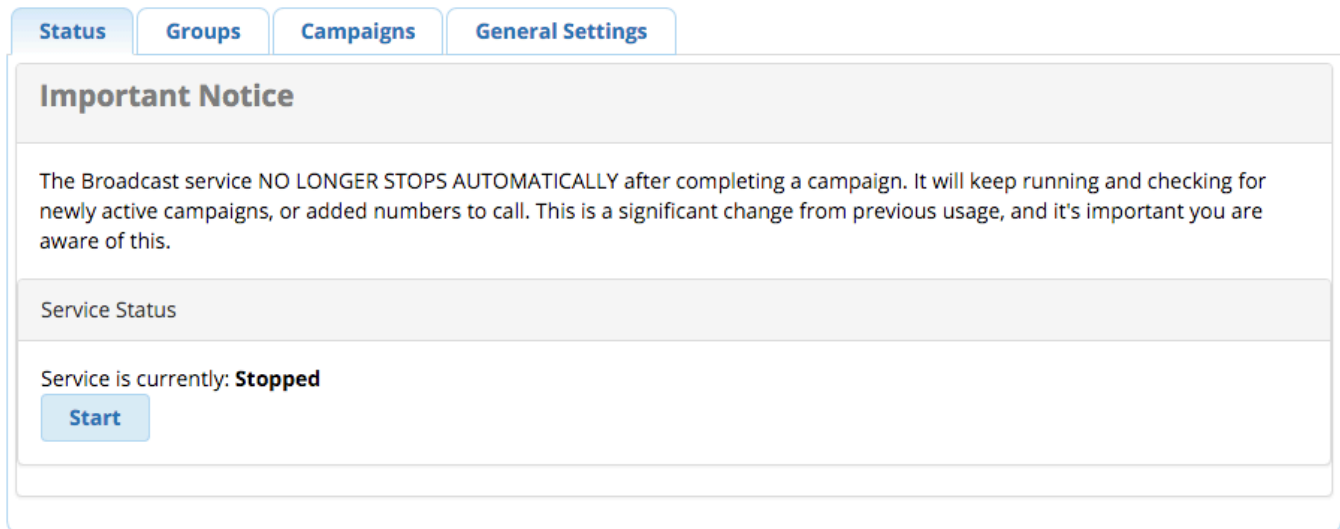
Status

Click the **Status** tab. This page works like an on/off switch for the broadcast service as a whole, and shows whether the service is running. It also shows which campaigns are active, whether they have been started, how many calls have been placed, and how many calls still need to be placed. You can download a report for the campaign.

When the broadcast service is running, calls will be placed for any active campaigns. When the service is stopped, no calls will be placed.

The broadcast service does not stop automatically after completing a campaign. It will keep running and checking for newly active campaigns, or added numbers to call. This is a significant change from previous usage, and it's important you are aware of this.

Broadcast Campaigns



The screenshot shows the 'Broadcast Campaigns' interface with the 'Status' tab selected. At the top, there are four tabs: 'Status', 'Groups', 'Campaigns', and 'General Settings'. Below the tabs is a large grey box titled 'Important Notice' containing the text: 'The Broadcast service NO LONGER STOPS AUTOMATICALLY after completing a campaign. It will keep running and checking for newly active campaigns, or added numbers to call. This is a significant change from previous usage, and it's important you are aware of this.' Below the notice is a section titled 'Service Status' which displays 'Service is currently: **Stopped**' and a blue 'Start' button.

Service Status

The **Start/Stop** button starts or stops the broadcast. Click the button to toggle the status. Changes take effect immediately. The status will be updated above the button to say "Stopped" or "Running" depending on the current status.

Current Campaigns

This section shows campaigns that have not yet completed. The **Active** checkbox indicates whether a campaign is active. However, remember that the broadcast service also needs to be running (see service status, above) in order for calls to be placed.

You can check / un-check the box to activate/deactivate a campaign.

Current Campaigns

| Active | Name | Start Time | Calls | Remaining | | |
|-------------------------------------|---------------|---------------------------------|-------|-----------|--------|----------|
| <input checked="" type="checkbox"/> | My Campaign | Fri, 23 Oct 2015 16:09:30 -0500 | 4 | 7 | Report | Complete |
| <input type="checkbox"/> | School Closed | Not Started | 0 | 11 | Report | Complete |

Report

Click the **Report** button to download a CSV file containing a report for the campaign.

Example:

| last_updated | campaign | callee_name | callee_number | initiated_dial | answer | delivered_to |
|----------------|----------|-------------|---------------|----------------|--------|--------------|
| 10/23/15 16:09 | 3 | Tango Frog | 5555551212 | yes | yes | person |
| 10/23/15 16:09 | 3 | Digit | 5555551234 | yes | no | |

Complete

Click the **Complete** button if you would like to manually mark a campaign as complete.

Complete Campaigns

| Campaign Name | Start Time | Calls | Remaining | | |
|---------------|---------------------------------|-------|-----------|--------|---------|
| My Campaign | Fri, 23 Oct 2015 16:09:30 -0500 | 7 | 7 | Report | Restart |

Complete Campaigns

This section shows campaigns that have been completed.

Report

Click the **Report** button to download a CSV file containing a report for the campaign.

Restart

Click the **Restart** button to move a completed campaign back to the **Current Campaigns** section.

Delete

Click the **Delete** button to delete a completed campaign.

Groups

Click the **Groups** tab.

From here, you can add, edit, or delete lists of names and numbers. You can include one or more call group within a single broadcast campaign. Any existing groups will be shown.

Broadcast Campaigns

Navigation tabs: **Status** | **Groups** | **Campaigns** | **General Settings**

+ Add Group Search [List View] [Grid View]

| Group | Actions |
|---------------|---------|
| Call Group 2 | |
| My Call Group | |

Showing 1 to 2 of 2 rows

- **To Add:** Click the **Add Group** button.
- **To Edit:** Click the pencil button next to an existing group.
- **To Delete:** Click the trash button next to an existing group. Then click **OK** to confirm the deletion.

Group Options

You'll be taken to the **Group Options** tab when you add or edit a group.

The **Call Group Name** field is mandatory. Others are optional, as you are not required to use a CSV file. You will have the option to enter names and numbers manually after submitting the data in this tab.

Broadcast Campaigns

Group Options

Call Group Name

Call Group URI Source

Delete after Retrieving Yes No

Update Period Seconds

Update From CSV

Call Group Name

The name of this call group.

Call Group URI Source

A URI to import the call group from. This currently supports FTP and HTTP in CSV format. FTP format would be "ftp://username:password@myserver.com/mylist.csv"

Delete after Retrieving

(FTP ONLY.) **Yes/No:** Whether to attempt to delete the file after downloading it from the URI provided above. If the system is unable to delete the file for whatever reason, then the import *will not* proceed.

Update Period

The time, in seconds, between URI updates.

Update From CSV

You can import a CSV file formatted as follows:

Names should be enclosed by '"' and fields separated by ',' Example:

```
"Name",Number,command
```

The command is either 'add' or 'remove', is optional, and defaults to 'add'. Examples:

```
"John Doe",12345678,add
```

```
"John Doe",12345687,remove
```

Click the **Browse** button to upload a CSV file. Choose the CSV file from your computer.

Save

Click the **Submit** button when done.

Numbers to Call

Click the **Numbers to Call** tab. (Note: This tab is only visible after you have submitted information in the **Group Options** tab).

- **To add a new callee:** Enter the name and number in the blank fields, and click the **Add/Edit Callee** button.
- **To edit an existing callee:** Click the **Edit** link for the entry, edit the name/number, and click the **Add/Edit Callee** button.
- **To delete an existing callee:** Click the **Delete** link for the entry, and click **OK** in the pop-up window to confirm deletion.

Broadcast Campaigns

Group Options **Numbers to Call**

Name ?

Number ?

Add/Edit Callee

Name

The name of the callee.

Number

The phone number of the callee.

Add/Edit Callee

Click the Add/Edit Callee button to save changes.



Campaigns

Click the **Campaigns** tab. From here, you can add, edit, or delete broadcast campaigns. You can activate/deactivate a campaign when adding or editing it. Any existing campaigns will be shown in a list.



Broadcast Campaigns

Status Groups Campaigns General Settings

+ Add Campaign 📄 🗖

| Campaign | Actions |
|-------------|---|
| My Campaign |   |

Showing 1 to 1 of 1 rows

- **To Add:** Click the **Add Campaign** button.
- **To Edit:** Click the pencil button  next to an existing campaign.
- **To Delete:** Click the trash button  next to an existing campaign. Then click **OK** to confirm the deletion.

Broadcast Campaigns

| | | | | | | | | | | | | | | | | | | | | | |
|--|---|------------|------|----|----|----------|---|----|----|------------|---------|----|------|----------|---------|----|------|-------------------|----------|----------|--|
| Duplicate Campaign ? | None | | | | | | | | | | | | | | | | | | | | |
| Campaign Name ? | | | | | | | | | | | | | | | | | | | | | |
| Concurrent Calls ? | 2 | | | | | | | | | | | | | | | | | | | | |
| Campaign Caller ID ? | | | | | | | | | | | | | | | | | | | | | |
| Dial Prefix ? | | | | | | | | | | | | | | | | | | | | | |
| Email Reports to ? | | | | | | | | | | | | | | | | | | | | | |
| Email Reports ? | <input checked="" type="radio"/> Never <input type="radio"/> Daily After End Time <input type="radio"/> After Campaign Completes | | | | | | | | | | | | | | | | | | | | |
| Campaign Active ? | <input type="radio"/> Yes <input checked="" type="radio"/> No | | | | | | | | | | | | | | | | | | | | |
| Call Groups ? | <p>Included</p> <p>Not Included</p> <ul style="list-style-type: none">Call Group 2My Call Group | | | | | | | | | | | | | | | | | | | | |
| Schedule ? | <table><tr><td>Start Time</td><td>8</td><td>00</td><td>AM</td></tr><tr><td>End Time</td><td>5</td><td>00</td><td>PM</td></tr><tr><td>Start Date</td><td>October</td><td>23</td><td>2015</td></tr><tr><td>End Date</td><td>October</td><td>23</td><td>2016</td></tr><tr><td>Only Call Between</td><td>Optional</td><td>Optional</td><td></td></tr></table> | Start Time | 8 | 00 | AM | End Time | 5 | 00 | PM | Start Date | October | 23 | 2015 | End Date | October | 23 | 2016 | Only Call Between | Optional | Optional | |
| Start Time | 8 | 00 | AM | | | | | | | | | | | | | | | | | | |
| End Time | 5 | 00 | PM | | | | | | | | | | | | | | | | | | |
| Start Date | October | 23 | 2015 | | | | | | | | | | | | | | | | | | |
| End Date | October | 23 | 2016 | | | | | | | | | | | | | | | | | | |
| Only Call Between | Optional | Optional | | | | | | | | | | | | | | | | | | | |
| Destination - Live Person Answered ? | == choose one == | | | | | | | | | | | | | | | | | | | | |
| Destination - Answering Machine / Voicemail Answered ? | == choose one == | | | | | | | | | | | | | | | | | | | | |

Duplicate Campaign

(Optional; Visible when you are creating a new campaign.) You can choose to duplicate an existing campaign. Select the campaign you wish to duplicate, then skip to clicking **Submit**. This allows you to run the same campaign after it is completed while keeping previous campaign reports intact.

Campaign Name

A unique name for this campaign.

Concurrent Calls

Maximum number of concurrent calls this campaign can make.

Campaign Caller ID

The caller ID that outbound calls will use for this campaign.

Dial Prefix

(Optional) A prefix to be appended to every number before it is dialed. This is useful, for example, to force calls to go out through a specific outbound route.

Email Reports to

The email address you wish the report to be emailed to.

Email Reports

Never / Daily After End Time / After Campaign Completes: When to e-mail a report.

- **Never:** A report is not sent.
- **Daily After End Time:** A report is sent each day after the end time is reached, and also after the campaign is completed.
- **After Campaign Completes:** A report is sent after the campaign completes.

Campaign Active

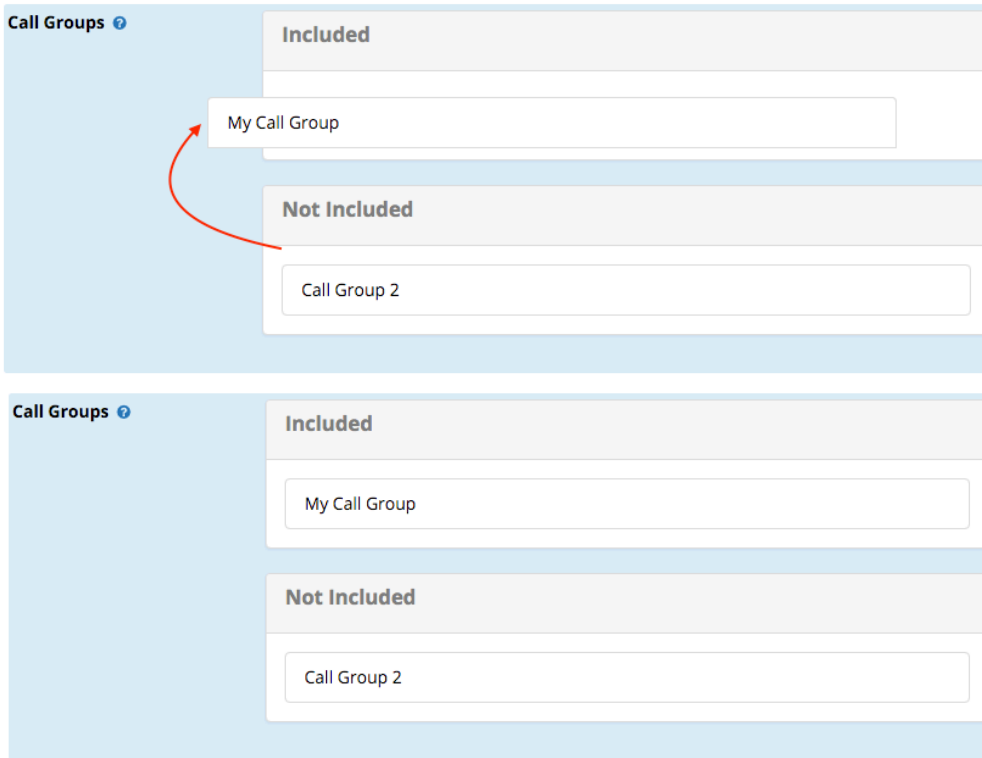
Yes/No: Whether the campaign will be active after submitting the data on this page. Select **Yes** to activate the campaign upon addition /modification.

Note

The broadcast service must be running in order for the campaign to begin, even if you select **Yes** here. You will need to visit the **Status** tab if you haven't yet started the broadcast service.

Call Groups

To specify which call group(s) will be included in this campaign, drag one or more call groups out of the **Not Included** bin and drop in the **Included** bin.



Schedule

Date and time options for this campaign.

Destination - Live Person Answered

Where to send calls answered by a live person.

Destination - Answering Machine / Voicemail Answered

Where to send calls answered by an answering machine or voicemail. Please note, the system makes all attempts to detect a voicemail or answering machine, but this is not guaranteed to be reliable. Answering Machine Detection (AMD) is handled by Asterisk, and must be configured independently. The default settings for AMD may work, but may need to be adjusted for your specific system and trunks. You can manually review and edit Asterisk AMD settings in the file `amd.conf` using the [Config Edit module](#). When selecting destinations for answered calls, please ensure you plan for the occasional possibility that calls may be falsely flagged as either machine or human.

Save

Click the **Submit** button, then click the **Apply Config** button. (Remember, the broadcast service must be running in order for this campaign to begin. Please visit the **Status** tab to check status.)

General Settings

Click on the **General Settings** tab.

Broadcast Campaigns

| Status | Groups | Campaigns | General Settings |
|---|--------|-----------|------------------|
| Concurrent Calls ⓘ | | | |
| <input type="text" value="2"/> | | | |
| Maximum Retries ⓘ | | | |
| <input type="text" value="4"/> | | | |
| Report 'From' Address ⓘ | | | |
| <input type="text"/> | | | |
| Answering Machine Detection is configured in the file <code>/etc/asterisk/amd.conf</code> . | | | |

Concurrent Calls

The maximum number of calls ALL running campaigns (combined) can place at any given time. This should be less than the total number of channels available on the system, in order to still allow other calls to be made and received while a broadcast campaign is in progress.

Maximum Retries

The maximum number of times to try calling busy numbers back.

Report 'From' Address

(Optional) If you would like to customize the "from" e-mail address that reports appear to come from, enter the e-mail address here.

How to Toggle a Campaign On or Off Remotely

If you point a destination of your PBX to a start and stop toggle for a campaign, you can activate/deactivate the campaign at any time simply by dialing the destination.

If the broadcast service is stopped, it will begin running automatically if you activate a campaign through dialing a toggle.

For example, if you have a campaign set up (but not active) to alert parents that school is closed for the day due to weather, you could create a hidden IVR with an option to press 134 to activate the "School Closed" campaign, and 234 to deactivate it. Dialing 134 from the IVR would be the same as checking the **Active** box in the **Status** tab of the Broadcast Campaigns GUI page. You could route an inbound DID to the IVR to allow someone to access it remotely.

Example IVR entries:

— IVR Entries

| Ext | Destination | Return [?] | Delete |
|----------------------------------|---|---|--------|
| <input type="text" value="134"/> | <input type="text" value="Broadcast"/> <input type="text" value="Start School Closed Campaign"/> | <input type="button" value="Yes"/> <input checked="" type="button" value="No"/> | |
| <input type="text" value="234"/> | <input type="text" value="Broadcast"/> <input type="text" value="Stop School Closed Campaign"/> | <input type="button" value="Yes"/> <input checked="" type="button" value="No"/> | |

+