

ICTContact User Guide

ICT Innovations

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Quick Start Guide: Launch Your First Campaign in 10 Minutes

By the end of this page you will have a trunk that can carry calls, a route that tells the dialer to use it, one recording, one contact group and a running Message Campaign that plays the recording to everyone in the group. We go through the screens in the order the dialer needs them. Log in with the Login as User button using the admin account; a client account can do everything from step 3 onward if the admin has already set up the trunk and route.

1. Add a trunk (Administration > Gateways)

A trunk is your VoIP provider. Click New Trunk. The form is split into fieldsets:

Fieldset	Fields
Trunk	Trunk Name, Type (Outbound, Inbound, Outbound and Inbound), Status (Active, Disabled), Weight (-10 to 10)
Technical Informations	Gateway Type (Asterisk, Kannel, SwiftMailer, Http, Twilio), service checkboxes Voice, Fax, SMS, Email, Video
Outbound Configurations	CPS Limit (new calls per second), Max. Channel Capacity (concurrent calls), Dial Prefix
CallerID / From Address	CallerID Format, Default CallerID, CallerID Title Format, Default CallerID Name
Trunk Configuration	Protocol Type (SIP), Register String, Settings, Dial String

For a normal SIP provider pick Gateway Type Asterisk, tick Voice, set CPS Limit and Max. Channel Capacity to what the provider allows (we usually start with 1 and 5 for a test), paste the provider's peer settings into Settings, and use the Dial String `PJSIP/%phone@%trunk`. Leave Register String empty unless the provider told you to register. Save.

Two things catch people here. The Status column in the trunk list only shows Active or Disabled; it does not show whether the trunk is registered or reachable. Check that in Asterisk with `asterisk -rx "pjsip show registrations"` or `pjsip show endpoints`. And a trunk on its own is never used: the dialer picks a trunk through a route, which is the next step. The trunk row has a [Test] link (choose a Service, a recording and a Contact number to place one test call) and an [Assign] link (Assigned to: [System], Available to clients, Available to plans).

2. Add a route (Contact Center > Billing > Routes)

Click New Route. Fields: Services (Voice), Trunk (only outbound trunks that carry the chosen service are listed), then Destinations: Region, Country and a Destination list where you select one or many prefixes. Save.

The dialer matches a phone number to the longest destination prefix that has a route, then picks a trunk from that route. If several trunks serve the same destination, the one with the lowest Weight and free channels is tried first. There is no priority field on the route itself. If you skip this step the campaign starts but every call fails, because the dialer has no trunk to send it to. You can also bulk load routes with the Import button (sample file route_sample.csv, one line per destination: prefix, name).

3. Add a recording (Contact Center > Messages > Recordings)

Click New Recording. Fields: Recording Name (letters, digits, dot, dash and underscore only, no spaces), Description, Recording Source: Recording File or Text. With Recording File you upload a file under File Name; with Text you type into Text to Recording and the server generates the audio. Whatever you upload is converted to 8 kHz mono WAV, so a WAV file is the safe choice. The list shows Recording Name, Length, Type, Description and Operations, where you can play or download the converted file.

4. Add a contact group (CRM > Customer > Contact Groups)

Click Add new. Fields: Title, Description, Group Type. Leave Group Type on Internal Contacts; the other entries in that list (Agile CRM, ActiveCampaign, Apptivo CRM, Capsule CRM, Close CRM, Copper CRM, Creatio CRM, Dynamics 365, Freshsales, Keap (Infusionsoft), Less Annoying CRM, Monday.com, Streak CRM, YetiForce CRM, Zendesk Sell, Vtiger CRM, SuiteCRM, Salesforce, Zoho CRM, SugarCRM, Pipedrive) pull contacts from a CRM and need that CRM's credentials.

Under Import Contacts (Optional) choose a Type of Source:

- Upload Contacts via standard file: a CSV in the order of the Example File Contact_sample.csv: phone, first name, last name, email, street address, then up to eight custom columns. Phone numbers go in with country code and no plus sign, for example 923330000000.
- Upload Contacts via custom file: same upload plus CSV Format, Column Separated By, Column Enclosed By and Rows to Skip, for files that do not follow the sample layout.
- Copy Contacts from existing Groups: pick Source Groups.

Fetch CNAM Data can stay on Don't fetch. Save. The group list shows Group Name, Description, Total Contacts, Total CNAM and Operations; check that Total Contacts is what

you expect before you build the campaign.

5. Create the campaign (Contact Center > Campaigns Management)

Click Add new. You land on the campaign type screen with two groups, Voice Broadcasting and Fax SMS, Email, & Video Broadcasting. Click the first Message Campaign card (there are two cards with that title; the first one is the plain voice broadcast: dial, play the recording, hang up). A wizard opens with a tab per step and Previous and Next buttons at the bottom; Save is in the top right.

1. Basic Configuration. Name. Dialing Mode is a select (Inbound Dialing, Broadcasting, Predictive Dialing, Progressive Dialing, Preview Dialing, Manual Dialing) but for a Message Campaign it is preset to Broadcasting and greyed out. Caller ID Type: User CallerID, Anonymous CallerID, [custom], Random CallerID List, Sequential CallerID List (which ones you see depends on the client's caller ID permissions), then Caller ID and Caller Name. Both have a Show available tokens link if you want to insert contact fields.
2. Contact. Source (Lead, Deal, Contact), Contact Type (File or Group), Contact Group (pick the group from step 4). Then the campaign mode: Conclude Campaign (stop when the list is done), Wait Inbound, Wait Contacts (API) (stay up and dial contacts pushed through the REST API), Repeat Contacts (with a repeat count and a Delay of [No Delay], 5 Minutes, 10 Minutes, 30 Minutes, 1 Hour, 2 Hours or Until next schedule). For a first run use Conclude Campaign.
3. Message Campaign Configuration. Message Recording (the file from step 3). Introductory Message: [Disabled] or [Enabled] plus a recording to play first. Action on DNC: [Disabled] or [Enabled]; when enabled a key press of 9 removes the number from the list. Action on AMD: [Disabled], Hangup, or Leave Message plus the recording to leave on the machine. Voice Disclaimer appears when disclaimers are switched on for the account.
4. Advance Configuration (the tab is spelt Advacne Configuration on this build). Max. Concurrent Channels (default 2 on this node, capped by the client's channel limit), Max. Retries ([Disabled] or 1 to 5), Suggested dialing order (Repeat primary, Repeat primary and secondary, Repeat primary, secondary and tertiary, Repeat from primary to quinary), Max. Call Duration in seconds (default 600), Max. ring time in seconds (default 45). There is no schedule on this form: the campaign starts when you click the Start Campaign icon in the list and stops when the list is done or when you click Stop Campaign. The hours in which it may dial come from the client's resources (Administration > Client Management > Assign / Remove Resources).

Click Save. For a first test use a group with two or three numbers you can answer yourself, Max. Concurrent Channels 1 and Max. Retries [Disabled].

6. Start it and watch

The campaign list shows #, Campaign Name, Type, Progress, Status, Operations and Reports. In Operations click the start icon (its tooltip is Start Campaign). Status goes Pending, then Active, and Progress fills as contacts are dialed. The same column holds stop, cancel, edit, copy and conclude icons.

Where to look while it runs:

- Dashboard: My Active Campaigns shows Dialed, Answered, Failed, ActiveChannels and ChannelLimit for each running campaign, with Increase Limit and Decrease Limit arrows and a View Campaign Details link that lists live calls.
- Reports > CDR: one row per call with Started At, Answered At, Ended At, Ended By, Campaign, Phone, Destinations, Provider (the trunk), Rate, Cost, Status and Response. Filter by Campaign and Date, then Export or Print.
- Reports > Overview: totals per campaign and period (Date / Time, Campaign, Total Calls, Amount, Net Amount, Total Cost). The Reports column in the campaign list also has a [CDR](#) link and a results link that opens the campaign summary.

If it does not dial

What you see	Where to look
Status stays Pending or flips to Stopped straight away	Check that the campaign daemon is running on the server and read logs/campaign-/daemon.log.
Stopped (not enough credit, reserve-credit is: ...)	The client has no balance. Add credit under Contact Center > Billing > Payments, or check the Rate Plan has a rate for the destination.
Stopped (by administrator)	The licence does not allow the campaign to run.
Calls appear in CDR with Status failed and no Provider	No route matched the number. Add the prefix under Billing > Routes and confirm the trunk carries Voice.
Calls fail and the trunk is the right one	The provider rejected the call. Check <code>asterisk -rx "pjsip show endpoints"</code> , the Dial String and any Dial Prefix the provider requires.
Contacts never get dialed outside certain hours	The client has an Allowed Time Slot and Allowed Weekdays under Client Management > Assign / Remove Resources.
Campaign runs but only one call at a time	Max. Concurrent Channels on the campaign, Max. Channel Capacity on the trunk, or Max Allowed Channels on the client. The smallest of the three wins.

Campaign Types and Modes

Contact Center > Campaigns Management is where every outbound run, inbound line and message blast lives. Click Add new and you land on the type cards, grouped under Voice Broadcasting and under Fax SMS, Email, & Video Broadcasting. Pick a card and a wizard opens with a tab per step: Basic Configuration, Contact, the type's own configuration step (Message Campaign Configuration, Agent Campaign Configuration and so on) and a final settings step. Previous and Next sit at the bottom of each step, Save at the top right. This page describes the shared steps once, then what each card adds, so you can decide which to use before you start clicking.

Step 1: Basic Configuration

General Configuration holds:

- Name (required). It cannot be changed afterwards; on Edit it is shown as plain text.
- Dialing Mode: Inbound Dialing, Broadcasting, Predictive Dialing, Progressive Dialing, Preview Dialing, Manual Dialing. The help text under the field reads, one per mode: Inbound: Recommended for inbound campaigns. Broadcasting: Automatic dialing, recommended for message broadcasting. Predictive: Automatically dial excessive no. of contacts to keep agents busy. Progressive: Automatic dialing for agents, one contact per agent. Preview: Automatic and agent assisted dialing, one contact per agent. Manual: Manually dial random number in campaign. Most card types preset the mode and grey the field out; only the Agent Campaign lets you pick between the four agent modes. The field is hidden on Edit.
- Select Trunk. Only shown to accounts that have dedicated trunks assigned, with [Use any available trunk] as the first choice. Everyone else has no trunk field here: the trunk is chosen by Billing > Routes.
- Caller ID Type: User CallerID (shown as [User CallerID (DID)] when DID's are assigned to the account), Anonymous CallerID, [custom], Random CallerID List, Sequential CallerID List. Which of these appear depends on the caller ID permissions of your account; if only one is permitted the field is hidden. The help text says CallerID will not effect inbound calls.
- Caller ID and Caller Name, each with a Show available tokens link that inserts a contact field (for accounts with that permission). With a list type the single value is replaced by a CallerID List box.

Step 2: Contact

- Source: Lead, Deal or Contact. This decides which groups the next field offers.
- Contact Type: File or Group. File shows Upload contact's File (click more ... for extra files) and builds a group from the upload. Group shows Contact Group (required).

Both are fixed on Edit.

- Contact List Closure. This is the campaign mode. The choices and the exact descriptions printed under the field:
 - Conclude Campaign: Stop and mark as completed the current campaign after processing all the contacts.
 - Wait Inbound: Process contact if there is any, then wait for incoming requests. This is how you run an inbound line: forward a DID to the campaign and it answers calls (or texts) for as long as it is active.
 - Wait Contacts (API): Connects with all available contacts, and then keep waiting in background for new contacts. Contacts pushed over the REST API are dialled as they arrive. Repeat Contacts is forced to 1 in this mode.
 - Repeat Contacts: Re-attempt the same contact group / list multiple times. Wait Inbound and Wait Contacts (API) only appear when the licence includes the inbound and API modules.
- Repeat Contacts: how many times the group is run (default 1).
- Delay: the pause between runs: [No Delay], 5 Minutes, 10 Minutes, 30 Minutes, 1 Hour, 2 Hours, Until next schedule.

The Appointment Reminder and Feedback types set the closure themselves and hide or grey the field.

Last step: the settings

Every voice and fax type ends with a settings step. It is labelled “Advacne Configuration” on screen (a typo in the product, worth passing to the developer), “Settings” on the Integration Campaign and “Agent Campaign Retry” on the Agent Campaign. Fields:

- Max. Concurrent Channels (required). How many calls at once. The default comes from Campaign Default Settings (2 on this node).
- Max. Retries: [Disabled], or 1 up to the system limit (5 here).
- Suggested dialing order: Repeat primary, Repeat primary and secondary, Repeat primary, secondary and tertiary, Repeat from primary to quinary. It decides which of the contact’s phone fields are tried on retries.
- Max. Call Duration in seconds (required, default 600).
- Max. ring time in seconds (required, default 45).

Max. Retries and Suggested dialing order disappear from the form once the campaign exists.

Where a type offers AMD it is a pair: Action on AMD ([Disabled], Hangup, Leave Message, plus Leave Reminder on the reminder type) and the recording to leave. Action on DNC ([Disabled]/[Enabled]) lets the contact press 9 to be removed from the list.

There is no schedule step in the wizard on this build: a campaign starts when you click the Start Campaign icon in the list and stops when it finishes (Conclude Campaign) or when you click Stop Campaign. The start and stop schedule fields and the 3rd party integration step of older versions are commented out in the code.

The twelve cards

Voice Broadcasting:

Agent Campaign. Dials the list and, on answer, passes the call straight to an agent, an external call centre or a skill group. Agent Campaign Configuration: Action on AMD, Dialogue / Script (a script the agent sees), Contact URL (a page the agent browser opens with the contact), queue settings Ring Strategy (Ring All, Least Recent, Fewest Calls, Random), Max Wait Time, Agent Timeout, Wrap-Up-Time, Dialing Pace (Relaxed, Steady, Moderate, Hasty, Rapid), Agent / Operator Extension or [Assign Multiple Agent] with an Agents list. Dialing Mode offers the four agent modes only, and Wait Inbound is not offered.

Message Campaign. Plays one recording and hangs up. Message Campaign Configuration: Message Recording, Introductory Message ([Disabled]/[Enabled] plus a recording), Action on DNC, Action on AMD, Voice Disclaimer when disclaimers are enabled for your account. Dialing Mode preset to Broadcasting.

Interactive Campaign. Plays a recording and transfers to an agent when the contact presses a key. Fields: Message Type (Message Broadcast only, Forward to Agent on answer, IVR with forward to Agent, IVR with forward to Agent on key press), Message Recording, Dialogue / Script, Contact URL, Introductory Message, Action on DNC, Required input key ([Auto Transfer] or a key 0 to 7), Action on AMD, Voice Disclaimer, then an Agent section and Campaign Agents with the same queue settings as the Agent Campaign. Dialing Mode preset to Predictive Dialing.

IVR Campaign. Runs an IVR you drew in the IVR designer on each answered call. IVR Campaign Configuration: Select IVR. Dialing Mode preset to Broadcasting. This is also the type you use for an inbound voice line, with Contact List Closure on Wait Inbound.

Survey Campaign. Asks a series of recorded questions and stores the answers. Voice & General Options: Message Recording, Introductory Message, Action on DNC, Action on AMD. Survey Campaign Configuration: Survey Questions (how many), and per question a recording, the answer type (DTMF Response or Voice Response), an answer duration, and per key a label (Yes, No, Not sure, [Custom], [not in use]) with a next step ([Default], [Transfer to Agent], [End Survey], [Hangup Call]). Survey End: End / Goodbye Message. Dialing Mode preset to Broadcasting.

Appointment Reminder. Calls each contact with a message built in Message Designer. The Contact step is renamed Appointment and gains Reminder Message. Reminder Campaign Configuration: Appointment Type (Group Appointment or Individual Appointments), Appointment Start Field, Reminder Call Time (hours before), Appointment Stop Field, Reminder Expiry Time, then Action on DNC and Action on AMD with the extra Leave Reminder choice. See the Message Designer Guide.

Integration Campaign. A recorded offer menu whose results are posted to one of your Integrations. Integration Offers: how many, and per offer an ID, Introduction and Detail recording. Integration general message (as spelt on screen): Greeting message, Offer end message (main menu), Detail end message (sub menu), Confirmation message, Thanks

message, Wrong message. Integration APIs: Integration. General Options: Action on DNC, Action on AMD. Dialing Mode preset to Broadcasting.

AI Voice Agent. The same wizard as the Interactive Campaign, with a notice on top showing how many AI personas your account has. Select an IVR that contains an AI Voice Agent node. See the AI Voice Agent Guide.

Fax SMS, Email, & Video Broadcasting:

SMS Campaign. Sends one text to every number. SMS Campaign Configuration: Text Message (from Contact Center > Messages > SMS) and SMS Disclaimer when enabled. No Wait Inbound.

Feedback Campaign. An inbound SMS campaign: contacts reply with a keyword and the reply is matched to an option. Feedback Campaign Configuration: Feedback Options (how many, up to 9), and per option a Description, Filter Keywords and an Action / Integration. Dialing Mode preset to Inbound Dialing and Contact List Closure to Wait Inbound.

Email Campaign. Sends a template to every email address. Email Campaign Configuration: Email Template (from Contact Center > Messages > Email Templates) and Email Disclaimer when enabled. No Wait Inbound.

Fax Campaign. Sends a document to every fax number. FAX Campaign Configuration: FAX Document (from Contact Center > Messages > FAX Documents) and Fax Disclaimer when enabled. No Wait Inbound.

Note for the webmaster: the code contains a second card titled “Message Campaign” (the voice_onepage type). On this build its card is commented out and does not render, so one Message Campaign card appears. Flag the duplicate title to the developer in case it is re-enabled on another build.

The campaign list

Columns: #, Campaign Name, Type, Progress, Status, Operations and Reports. Operations offers Monitor Live statistics, Start Campaign, Stop Campaign, Cancel Campaign, Edit Campaign, Copy this campaign as new campaign and Conclude current campaign and mark it as completed, depending on the status. Reports has View Campaign results. Statuses run pending, starting, active, stopping, completed.

Contacts and Contact Groups

Contacts are the people and numbers your campaigns dial, message or fax. They sit under CRM > Customer in three screens: Contact Groups (the lists a campaign selects), Contacts (the individual records, with import, export and a timeline) and Company (the organisations you link contacts to). A campaign always dials a group, never a loose contact, so the usual order is: create the group, load it, then pick it in the campaign wizard.

Contact Groups

The list shows Group Name, Description, Total Contacts, Total CNAM and Operations. Top buttons are search, Add new and Refresh. The row icons, left to right: Edit Contact Group, View Contacts in this Group, Search and delete unwanted Contacts from this group, Start a process to create or update CNAM database for this Contact group, and Drop all CNAM records associated with this Contact group. While a CNAM run is in progress the start icon becomes Stop CNAM update process. Delete Selected removes ticked groups.

The search panel filters on Contact Group, Description, Total Contact, Total CNAM and Date.

Add a group

1. Click Add new.
2. Under Group Description enter Title (required) and Description.
3. Leave Group Type at Internal Contacts for a list you load yourself. The other entries are CRM feeds (Zoho CRM, Salesforce, Pipedrive and so on); choosing one swaps the import section for that CRM's connection fields, and the records are pulled when a campaign using the group starts. The CRM Integrations Guide covers those.
4. Under Import Contacts (Optional) set Type of Source:
 - [continue without import](#)
 - Upload Contacts via standard file: a CSV laid out like the Example File, Contact_sample.csv: phone, first name, last name, email, address, then up to eight custom values.
 - Upload Contacts via custom file: any CSV. Fill in CSV Format: Column Separated By (default comma), Column Enclosed By (default double quote), Rows to Skip (default 0, set 1 if the file has a header row). After Save you get the mapping page.
 - Copy Contacts from existing Groups: tick one or more Source Groups.
5. Under Scan for CNAM choose Don't fetch or Fetch CNAM Data.
6. Click Save.

Group Type is fixed once saved. Title and Description can be edited later, and you can import more contacts into an existing group from the Contacts screen (Import button, Target Group).

Custom CSV mapping

On the Map Contact fields with CSV page every CSV Column # has a dropdown of contact fields with a sample value from the file beside it. Pick the matching field or [ignore this field] for columns you do not want. Phone is the only field a contact must have. The dropdown includes Custom Value #1 to #8; these are stored with the contact and used in campaign tokens, and they carry whatever names the administrator has given them in the system configuration.

Filter Contact: clean a group

The funnel icon opens a form that deletes matching contacts from the group. Each dropdown defaults to [doesn't matter], so only set the ones you mean.

- Contact Filter: Phone number (Invalid or no phone number), Email address (Invalid or no email address).
- CNAM Filter: CNAM Record (Invalid or no CNAM record, No CNAM record, Invalid record), Contact Type (Landline, Wireless / Mobile, Pager, VoIP, Other), Ported Contacts (Ported, Not ported).
- Filter contacts: Do Not Call Registry (DNC) (Listed in DNC), Duplicate Contacts (Duplicate phone numbers or Duplicate email address) with Which copy of duplicate (Older copies or Newer copies).

Click Filter to run it. A typical pre-campaign clean is Phone number = invalid, DNC = Listed in DNC, Duplicate Contacts = Duplicate phone numbers, Which copy = Older copies. The CNAM options only work after the group has been scanned.

Start and Reset CNAM

CNAM lookup asks the configured provider for the subscriber name, carrier, line type and ported status of each number. Start CNAM launches a background process for the whole group and the Total CNAM column on the list counts the records fetched so far; Stop CNAM halts it; Drop (reset) deletes the stored CNAM records for the group so a fresh scan can run. Individual contacts can be refreshed from the Contacts list with Update CNAM record, and viewed with View CNAM record, which shows CNAM owner info (Name, E-Mail, Address, City, State / Province, Country, Country Code) and CNAM Technical Details (Carrier Name, Service Type, Status, Ported, Company Number (OCN), Time Zone). Nothing happens without a CNAM provider configured on the node.

Contacts

CRM > Customer > Contacts lists every contact. Columns: Profile Image, First Name, Last Name, Phone, E-Mail, Role, Status, Operations. Row icons: View activity timeline, Edit Contact, View CNAM record (when one exists), Update CNAM record. Below the table: Delete Selected and Move Selected to DNC, which adds the ticked numbers to your DNC list and removes them from Contacts.

Top buttons: search, Add new, Import, Export, Timeline, Refresh. Export downloads the current filtered list as CSV.

The search panel has Contact Group, Name, Phone, E-Mail, Tag, Assigned Agent, Filter ([No Filter], [Invalid Contacts], [Duplicate Contacts]), Date, Saved Segment, Segment action (Apply or Delete) and Save search as. Admins also see Client. Save search as stores the current criteria under a name; later pick it in Saved Segment and click Search.

Add a contact

1. Click Add new.
2. Profile Picture: optional Profile Image (JPG, PNG, GIF).
3. Personal Information: First Name, Last Name, Status (Unassigned, In Progress, Processed, Junk Lead), Salutation (Mr., Mrs., ms., Dr.).
4. Client: Phone Number (required), E-Mail, Address, Company (from CRM > Customer > Company), Client Role.
5. Messenger: choose Chat Message, Whatsapp or Skype and enter the handle; Add ... shows another row.
6. Groups: Related Groups (multi-select) and Tags (comma separated, e.g. vip, callback, urdu).
7. Consent: Email consent and SMS consent (Unknown, Yes, No) and Consent source. The date of the last change is shown next to the source once set.
8. Additional Data: appears only if the administrator has defined extra fields for the account.
9. Click Save.

A contact must belong to at least one group to be dialled. Adding it here without a Related Group creates the record but no campaign will see it.

Import

The Import button opens Import Contact From (Type of Source, Upload contact's File, Example File, Source Groups), CSV Format for custom files, and Import Contacts Into with a required Target Group and Fetch CNAM Data. Custom files go through the same mapping page as above.

Duplicates and merge

Set Filter to [Duplicate Contacts] and Search. The view lists First Name, Last Name, Phone, E-Mail and Date for every record whose phone appears more than once, with four buttons: Delete Selected; Merge Selected (keep latest), which keeps the newest ticked record per phone number, copies any empty fields from the others, moves their history, notes, tags, groups and campaign entries onto it and deletes them; Delete Duplicate (keep latest) and Delete Duplicate (keep old), which delete without merging. Tick at least two records sharing a number before Merge, or you get "No duplicates found among the selected contacts".

Timeline, notes and messages

Click the first row icon or the Timeline button to open Contact Activity. The card at the top shows Name, Phone, E-Mail, Type (lead, contact or deal), Status, Stage, Assigned Agent, Lead Score and Tags. Below it:

- Add Note: a Note box with Save Note. Notes carry the author (user or agent) and show in the list.
- Send Message: Via Campaign, a dropdown of your SMS and email campaigns, and Queue Send. The contact is added to that campaign's spool; an active campaign sends at once, a stopped one sends when it next runs.
- The activity list, newest first: calls, faxes, SMS and emails with the campaign name and a Recording link where one exists; delivery events (Sent, Delivered, Undelivered, Failed, Opened, Clicked, Bounced, Spam complaint, Unsubscribed, Replied); SMS replies; dispositions with the agent's comments; notes; and inbound or outbound chat messages.

Buttons on this page: Edit Contact and Go back.

Company

CRM > Customer > Company holds organisations that contacts, leads, deals, quotes and invoices can point at. The list shows Company Name, Phone, E-Mail and Operations; buttons are search, Add new and Refresh. The form, under Company Information: Company Name, Company Type (Client, Competitor, Partner, Other), Phone Number, E-Mail, the Messenger rows, and an Address block where Details switches between Company and Person and reveals Delivery address, Street Address, Person First name, Person Last name and Person Status.

About the built-in CRM

Contacts, leads and deals are one record type with a marker, so a record moves from Leads to Contacts or Deals without copying, and the timeline, notes, tags, assigned agent and lead score travel with it. Everything described here runs inside ICTContact; there is no separate CRM server to install. If you already run a CRM, the same contacts can be pulled in through a CRM-type contact group and call results pushed back through an Integration (see the CRM Integrations Guide).

IVR Builder Guide

The IVR page is where you draw a call flow: answer the call, play a recording, offer a keypad menu, send the caller to an agent, hang up. You end up with a saved IVR that an IVR Campaign dials out with, or that an inbound DID lands on. Open it from Contact Center > Messages > IVR.

The list shows IVR Name, Description and Operations (a pencil to edit). Top buttons are search, New IVR and Refresh, and there is a Delete Selected button under the table.

The designer page

Click New IVR. The page has two parts:

- IVR Information: IVR Name (required, must be unique for your account) and Description.
- IVR Designer: a toolbox of application tiles on the left (with a “Search apps...” box above it) and a drawing canvas on the right. The canvas already contains a Call Started node. You cannot delete it; every flow begins there.

How you work on the canvas:

1. Drag a tile from the toolbox and drop it on the canvas. Drop it inside the grid, a drop outside it is ignored.
2. Click a node to select it. A red border appears, a small x in the top left corner (remove) and, for nodes that have settings, a pencil in the top right corner.
3. Click the pencil. A dialog called “ properties” opens. Fill in the fields and click Apply (Cancel closes without keeping the changes). Apply only stores the settings in the page, nothing is written to the server yet.
4. Connect nodes. Every node has a red square on its left edge (input) and one or more squares on its right edge, each labelled with an outcome such as success, timeout, 1, 2, machine, human. Drag an outcome square and drop it on the picture of the next node. To break a link, drag the square back onto its own node.
5. Drag the node picture itself to tidy the layout. Links follow.
6. To remove a node, select it and click the x. The designer refuses while any link is still attached (“Please remove links before deleting an Application”), so detach first.
7. Click Save in the top bar. Reset reloads the last saved version, Cancel goes back to the list.

Every outcome you leave unconnected ends the call at that point, so connect the timeout and failure outputs too, even if only to a Call Hangup node.

Variables you can use

Get Input and Options Menu store what the caller pressed in a variable, [input1] to [input9]. Condition and the Say nodes can read those, and most dialogs also offer the contact fields of the person being called: [contact:first_name], [contact:last_name], [contact:phone], [contact:email], [contact:address] and the custom fields [contact:custom1] to [contact:custom8] (eight by default, your administrator may have renamed them). On an inbound call there is no contact record, so the contact tokens are empty.

The nodes

The toolbox on this build has these tiles. Where a node has a dialog, the fields are listed exactly as they appear.

Call Answer. Answers the call. Input labelled “incoming call”, output labelled “Start”. No settings.

Call Hangup. Ends the call. No settings.

AI Voice Agent. Hands the call to an AI persona that talks with the caller. Fields: Persona (active personas from Contact Center > Messages > AI Voice Agent) and Max Call Seconds (default 600). See the AI Voice Agent Guide for how personas are set up.

Get Input. Plays a prompt and collects a string of digits. Fields: Menu Message (a recording), Variable ([input1] to [input9]), Repeat Message ([Disabled], 1, 2 or 3 repeats on timeout or invalid entry), Wait for keypress (seconds, default 10), Min Length, Max Length, Invalid Message ([No Message] or a recording). Outputs: success, timeout.

Condition. Compares a variable with a value and branches. Fields: Variable (an input variable, a contact field, or Enter Manually which reveals Custom Variable), Operator (Equal, Not Equal, Smaller, Greater), Value (a contact field, or Enter Manually which reveals Custom Value). Outputs: matched, unmatched.

Time Condition. Branches on the time of day and weekday, in the timezone of your account. Fields: From and To (HH:MM, defaults 00:00 and 23:59), Weekday (checkboxes Sunday to Saturday, Monday to Friday ticked by default). Outputs: within, outside.

Play Audio. Plays one recording from Contact Center > Messages > Recordings. Field: Recording. One output.

Call Transfer. Sends the caller to an extension. Field: Transfer, a dropdown of your Agents / Extensions entries of type Agent / Device, External Call Center and Skill Group. Outputs: success, busy, noanswer, congestion, failed.

Call Record. Records the call from this point. Field: Record, the maximum duration in seconds. 0 or a negative value removes the limit.

Options Menu. The keypad menu. Fields: Menu Message (recording), Repeat Message ([Disabled], 1, 2, 3), Wait for keypress (seconds, default 10), Invalid Message, Menu type (Normal menu or Menu with reports; most people leave Normal menu), Variable (where the

pressed key is stored, [input1] by default). Outputs: one per key, 1 to 4 or 1 to 9 depending on the server setting (this node shows 1 to 9), plus 0 and timeout. Keys * and # are not offered.

Answering Machine Detection (AMD). Listens to the start of the call and decides. No settings. Outputs: machine, human. Only meaningful on outbound calls.

Do Not Call (DNC). Adds the number to the DNC list and continues. No settings.

Play text-to-speech (TTS). Speaks typed text. Field: Text. It needs a speech engine installed on the server (Festival by default). If the node plays nothing, ask your administrator which engine is set up.

Say Alpha. Spells out characters one by one. Fields: Select variable (a contact field, or leave it on Enter Manually and type into Alpha Characters). Allowed characters: letters, digits, space and the symbols @ # \$ * - + = / . and the exclamation mark.

Say Digit. Reads digits one by one, “one two three”. Fields: Select variable or Digits (0-9 only).

Say Number. Reads a number as a whole, “one hundred twenty three”. Fields: Select variable or Numbers (0-9 and the dot).

Say Date. Speaks a date. Fields: Select variable or Date (a calendar picker, stored as mm-dd-yyyy). A contact field used here must hold the date in that same mm-dd-yyyy form.

Say Time. Speaks a time. Fields: Select variable or Time (hour and minute dropdowns, minutes in steps of 5). A contact field used here must hold HH:MM in 24-hour form.

Send DTMF. Sends keypad tones into the call, useful when you transfer into another phone system that needs an extension dialled. Fields: Select variable or Digits (0-9).

Add Delay. Waits before the next node. Field: Seconds (numbers only).

Set Caller ID. Changes the caller ID presented on a transfer. Fields: Select variable or CallerID (numbers only).

Integration API. Calls one of your Integrations (Contact Center > Messages > Integrations) at this point of the flow. Field: Integration.

Putting an IVR live

There are two ways. Both go through a campaign.

Outbound, IVR Campaign. Contact Center > Campaigns Management, Add new, pick the IVR Campaign card. In the step IVR Campaign Configuration choose your IVR in Select IVR. The Dialing Mode is fixed to Broadcasting for this type. The last step (labelled “Advacne Configuration” on screen) holds Max. Concurrent Channels, Max. Retries, Suggested dialing order, Max. Call Duration in seconds and Max.ring time in seconds. The campaign dials each contact and, on answer, runs your IVR from Call Started.

Inbound, DID. Create the same IVR Campaign but set Contact List Closure to Wait Inbound in the Contact step. That campaign dials whatever is in the contact group (an empty group is fine) and then stays active, listening for calls. Start it. Then open the DID's forwarding page (the Forward DID icon on the DID list; the DID list is not in the sidebar on the current build, DIDs are assigned to your account by the administrator from Client Management > Assign / Remove DIDs) and set Usage to Forward to Campaign and Campaign to that campaign. The DID Forwarding form on this build offers Forward to Extension and Forward to Campaign only; there is no direct "IVR Menu" target, the campaign is the link. The campaign list shows only campaigns in state active, scheduled, stopped or pending in that dropdown.

The Caller ID and Max.ring time settings of the campaign do not apply to inbound calls.

Worked example: a three option menu with after hours handling

Goal: callers press 1 for sales, 2 for support, 3 to hear opening hours. Outside working hours they hear a closed message.

Before you start, upload three recordings under Contact Center > Messages > Recordings: "welcome_menu" ("Press 1 for sales, 2 for support, 3 for opening hours"), "closed" and "hours". Have an agent extension for sales and one for support under Administration > Agents / Extensions.

1. New IVR, name it "main_menu".
2. Drop Call Answer and connect Call Started to it.
3. Drop Time Condition. Pencil: From 09:00, To 17:30, tick Monday to Friday. Apply. Connect Call Answer, Start, to it.
4. Drop Play Audio, pencil, Recording "closed", Apply. Connect the outside output of Time Condition to it. Drop Call Hangup and connect Play Audio to it.
5. Drop Options Menu. Pencil: Menu Message "welcome_menu", Repeat Message 2, Wait for keypress 10, Invalid Message left on [No Message], Menu type Normal menu, Variable [input1]. Apply. Connect the within output of Time Condition to it.
6. Drop Call Transfer, pencil, Transfer = the sales extension, Apply. Connect output 1 of the menu to it. Repeat with a second Call Transfer for support on output 2.
7. Drop Play Audio with Recording "hours" on output 3, then connect it back to the Options Menu input so the caller returns to the menu.
8. Connect the timeout and 0 outputs of the menu, and the busy, noanswer, congestion and failed outputs of both transfers, to a Call Hangup (or to a Play Audio apology first).
9. Save.

Now create the IVR Campaign (Wait Inbound for a DID, Conclude Campaign for an outbound run), start it, and call in.

Keys 1 to 9 and 0 are the only choices an Options Menu can branch on. If you need more than that, chain a second Options Menu behind one of the keys.

How to Set Up an IVR Menu in ICTContact

By the end of this walkthrough you will have a phone number that answers, plays “press 1 for sales, 2 for support”, and sends each choice to an agent. The whole thing is four screens: Recordings, IVR, Campaigns Management and the DID forwarding page. Budget about twenty minutes the first time.

What you need before you start

- At least one working trunk under Administration > Gateways, and a DID assigned to your account. The administrator assigns DIDs from Administration > Client Management, row operation Assign / Remove DIDs.
- One or two agent extensions under Administration > Agents / Extensions. The agents log in with the extension number and its password and answer in the browser phone, no softphone needed.
- Your menu prompt as an audio file, or the text of it.

Step 1: upload the prompt

Contact Center > Messages > Recordings, New Recording.

1. Recording Name (letters and digits, we use names like welcome_menu) and Description.
2. Recording Source: Recording File to upload a file, or Text to have the server speak the text you type into Text to Recording.
3. For a file, pick it in File Name. Whatever you upload is converted to the format Asterisk plays (wav); the converter accepts the usual formats (wav, mp3, gsm, ogg, flac and many more).
4. Save. Back in the list, the play icon lets you listen to the converted file. Do that now, it is the quickest way to catch a bad upload.

Record a plain menu prompt without music under the voice. Say the key after the department (“for sales, press 1”) so callers hear the number last.

Step 2: draw the menu

Contact Center > Messages > IVR, New IVR. Give it an IVR Name, then build on the canvas (the IVR Builder Guide describes every node; here is the short version).

1. Drag Call Answer from the toolbox onto the canvas and link Call Started to it. Links are made by dragging the small square on the right edge of a node and dropping it

on the next node.

2. Drag Options Menu onto the canvas. Click it, click the pencil, and in the dialog set Menu Message to your prompt, Repeat Message to 2, Wait for keypress to 10 (seconds), leave Menu type on Normal menu. Apply. Link Call Answer (Start) to the menu.
3. Drag two Call Transfer nodes. In each dialog pick the extension in Transfer. Link output 1 of the menu to the first, output 2 to the second.
4. Drag a Call Hangup node and link the menu's timeout and 0 outputs to it, plus the busy, noanswer, congestion and failed outputs of both transfers. Anything left unlinked just drops the call silently.
5. Save (top bar).

Step 3: wrap it in an inbound campaign

An IVR never answers a number by itself. On this build a DID forwards to a campaign, and the campaign runs the IVR. So:

1. Contact Center > Campaigns Management, Add new, choose the IVR Campaign card.
2. Basic Configuration: Name. Dialing Mode is fixed to Broadcasting for this type; Caller ID settings here only matter for outbound calls.
3. Contact step: pick any Contact Group (an empty one is fine, the campaign dials whatever is in it and then waits). Set Contact List Closure to Wait Inbound. The description on the screen says it: "Process contact if there is any, then wait for incoming requests".
4. IVR Campaign Configuration: Select IVR, pick the one you just saved.
5. Last step ("Advacne Configuration" as labelled on screen): Max. Concurrent Channels is the only one that matters for inbound, set it to the number of simultaneous callers you want to accept. Max. Retries, Suggested dialing order, Max. Call Duration in seconds and Max.ring time in seconds are for the outbound side.
6. Save, then click the Start Campaign icon in the Operations column. An inbound campaign goes active straight away, no daemon to wait for.

Step 4: point the DID at the campaign

Open the DID list (did.php). It is not in the sidebar on the current build, so type the address or ask your administrator to do this step. Click the Forward DID icon on your number. In DID Forwarding set Usage to Forward to Campaign and Campaign to the campaign from step 3. Save. The dropdown only lists campaigns that are active, scheduled, stopped or pending, so start the campaign first if it is missing.

There is no "forward to IVR" choice on this form, the options are Forward to Extension and Forward to Campaign. The campaign is the link between the number and the IVR.

Step 5: test it

Call the DID from a mobile. You should hear the prompt within a second of the call connecting. Press 1 and watch the agent's panel ring. Then call again and press nothing: after 10 seconds the prompt repeats twice and the call drops, which is what you drew.

While testing, keep Contact Center > Reports > CDR open. Every inbound call appears there with Status and Response, and a call that never reached the IVR will be missing entirely, which tells you the problem is on the trunk or DID side.

When it does not work

Call connects, no audio at all. Nine times out of ten it is the recording. Open Recordings and press play on the prompt; if it is silent or garbled, re-upload a plain wav (8 kHz, mono). Then open the IVR, click the Options Menu node and check Menu Message still points at that recording; a deleted recording leaves the field empty. If you used a Play text-to-speech node, the server needs a speech engine installed and selected (Festival on a default install); that is a server setting, ask your administrator.

Audio plays but key presses do nothing. The DTMF mode on the trunk does not match what the carrier sends. Trunks are generated with `dtmf_mode rfc4733` (the usual RTP event tones). If your carrier sends tones in the audio or in SIP INFO, add one line to the Settings box of the trunk (Administration > Gateways, Edit Trunk, under Trunk Configuration):

`dtmfmode=inband , dtmfmode=info` or `dtmfmode=auto` , then Save; the trunk configuration is regenerated on save. Also check Wait for keypress on the menu node is not too short, 10 seconds is a sensible floor.

One way audio (the caller hears nothing, or you hear nothing). This is NAT. Trunk endpoints are generated with `rtp_symmetric`, `force_rport` and `rewrite_contact` already switched on, which covers a carrier behind NAT. If the ICTContact server itself sits behind NAT, the administrator has to set `external_media_address` and `external_signaling_address` on the UDP transport in `pjsip.conf` (the lines are present but commented out) and open UDP 10000 to 20000 on the firewall. There is no screen for this in the web portal.

Caller hears the prompt but the transfer fails. Look at which output fired. busy or noanswer means the agent extension did not pick up: the agent must be logged in and Ready in the agent panel. congestion or failed usually means the extension no longer exists or was deleted and recreated; reopen the Call Transfer dialog and pick it again.

The menu repeats forever. Repeat Message is per attempt. With it on 3 and Invalid Message set, a caller mashing keys hears the prompt four times. Lower it to 1 or 2.

Frequently asked questions

How deep can I nest menus? There is no hard limit. Each Options Menu branches on keys 1 to 9 and 0 (keys * and # are not offered), so for more choices you chain another Options Menu behind a key. Keep it to two levels; callers give up after that.

Can I play a different message after hours? Yes, with the Time Condition node. Set From and To (HH:MM) and tick the working days, then link the within output to the menu and the outside output to a Play Audio with a closed message. It uses the timezone of your user account.

Can callers say what they want instead of pressing keys? Not with Options Menu, which is keypad only. Speech is handled by the AI Voice Agent node: it hands the call to an AI persona that listens, talks back and can transfer to an agent or queue. See the AI Voice Agent Guide.

Can one IVR serve several numbers? Yes. Forward each DID to the same Wait Inbound campaign.

Can I use the same IVR for outbound? Yes. Create a second IVR Campaign with Contact List Closure on Conclude Campaign and a real contact group. The flow runs from Call Started when the contact answers.

Does the IVR know who is calling? On an outbound campaign call the contact tokens ([contact:first_name] and so on) are filled from the contact record, so Say nodes can read them. On an inbound call there is no contact, those tokens are empty.

Message Designer Guide

Message Designer builds a spoken message out of parts: a recording, a date read from the contact record, a time, a line of text-to-speech, and optionally a “press 1 to confirm” step at the end. The result is saved as an IVR Message. Appointment Reminder campaigns play one to each contact; it is also what an Appointment Reminder leaves on an answering machine when Action on AMD is set to Leave Reminder. Open it from Contact Center > Messages > Message Designer.

The list shows IVR Message Name, Description and Operations (pencil to edit). Top buttons: search, New IVR Message, Refresh. Delete Selected sits under the table.

How it differs from the IVR designer

The IVR page draws a flow chart with branches and keypad menus. Message Designer is a straight list: part one plays, then part two, and so on to the end. There is no canvas, no Get Input, no Condition and no transfer except the one key inside the Confirmation part. Use it when you want to say something to the contact, with personal details read out, and at most ask for a yes or no.

The page

New IVR Message opens a form with three areas.

Information: Name (required; letters, digits and underscore only, no spaces) and Description.

New Application: an Application dropdown with [Please select], Play Audio, TTS, Say Alpha, Say Digit, Say Number, Say Date, Say Time and Confirm Reminder. Picking one reveals that part's fields with an Add button and a Cancel button.

IVR Message (right hand column): the list of parts you have added, in play order. Each row has a drag handle to reorder, a pencil to edit (the Add button turns into Save while you edit) and a cross to delete.

Nothing is saved until you click Save in the top bar. Reset clears your changes, Cancel returns to the list.

The parts

Play Audio. Recording: one of your recordings from Contact Center > Messages > Recordings. The dropdown shows [Select Recording] until you pick one; Add refuses with “Please select a valid recording.” otherwise.

Text to Speech (TTS in the dropdown). A text box. The server speaks it with its text-to-speech engine (Festival on a default install). If TTS plays silence, the engine is not installed, ask your administrator.

Say Alpha. Spells characters one at a time, useful for a booking reference. Select variables: pick a contact field, or leave it on custom and type the value in the box below. Typing in the box clears the variable selection.

Say Digit. Reads digits one by one. Same two fields: Select variables or a typed value.

Say Number. Reads a whole number (“two hundred and ten”). Select variables or a typed value.

Say Date. Speaks a date. Select variables, or click the box to open a calendar picker. A contact field used here must hold the date as mm-dd-yyyy.

Say Time. Speaks a time. Select variables, or choose the hour (00 to 23) and minute (steps of 5, plus 59) from the Time dropdowns. A contact field used here must hold HH:MM in 24-hour form.

Confirmation (Confirm Reminder in the dropdown). Plays a recording and waits for a key.

Field	What it does	Default
Recording	The prompt played while waiting for the key	[Select Recording]
Response Time	Seconds to wait for a key	10
Confirm Key	Key that confirms the appointment (0 to 7)	1
Cancel Key	Key that cancels it (0 to 7)	2
Transfer Key	Key that sends the call to a person (none, or 0 to 7)	none
Agent / Operator Extension	Where the Transfer Key sends the call	first extension
Replay Key	Key that replays the message (0 to 7, *, #)	*

Every field is mandatory (“All fields are mandatory.”) and no two keys may be the same (“Key settings are conflicting.”). The caller’s choice is stored as the call response and shows in the campaign reports.

Contact fields you can read out

The Select variables dropdown in the Say parts lists [contact:first_name], [contact:last_name], [contact:phone], [contact:email], [contact:address] and the custom fields [contact:custom1] to [contact:custom8] (eight by default; the administrator can rename them, the token keeps the custom number). The value comes from the contact

being called, so the same message reads a different date for every person. Say Alpha and Say Digit are the ones that work well with names and reference numbers; Say Number on a phone number reads it as one giant number.

Worked example: an appointment reminder

We want each patient to hear: a greeting, “your appointment is on”, the date, “at”, the time, and then “press 1 to confirm, 2 to cancel, 0 for reception”.

Prepare the contact group first. Under CRM > Customer > Contact Groups, import contacts with the appointment date in custom1 as mm-dd-yyyy (for example 10-21-2026), the time in custom2 as HH:MM (14:30), and the full appointment start in custom3 as mm-dd-yyyy HH:MM:SS (10-21-2026 14:30:00). The last one is what the reminder scheduler reads; the first two are what the message speaks. Upload three recordings: reminder_intro, reminder_at, reminder_confirm.

1. Message Designer, New IVR Message. Name: appointment_reminder.
2. Application: Play Audio, Recording reminder_intro, Add.
3. Application: Say Date, Select variables [contact:custom1], Add.
4. Application: Play Audio, Recording reminder_at, Add.
5. Application: Say Time, Select variables [contact:custom2], Add.
6. Application: Confirm Reminder. Recording reminder_confirm, Response Time 10, Confirm Key 1, Cancel Key 2, Transfer Key 0, Agent / Operator Extension your reception extension, Replay Key *. Add.
7. Check the order in the IVR Message list, drag a row if something is out of place, then Save.

Now the campaign. Contact Center > Campaigns Management, Add new, Appointment Reminder card.

1. Reminder Information (the first step): Name, Caller ID.
2. Appointment step: Contact Group, and Reminder Message = appointment_reminder.
3. Reminder Campaign Configuration: Appointment Type. Group Appointment calls everyone now, like a broadcast. Individual Appointments reads each contact’s own time: set Appointment Start Field to custom3, Reminder Call Time to how many hours before the appointment to call (we usually use 24), Appointment Stop Field if you have one, and Reminder Expiry Time for how long after that to keep trying.
4. General Options: Action on DNC, and Action on AMD with the extra choice Leave Reminder, which plays the same IVR Message to an answering machine instead of a plain recording.
5. Settings as for any voice campaign, then Save and Start.

Run it on a group of two or three test contacts (your own numbers) before the real list. Listen for the date: if you hear nothing where the date should be, the custom field is not in mm-dd-yyyy form.

AI Voice Agent Guide

An AI persona is a voice agent that talks with a caller in natural speech: it listens, answers, and can transfer the call, book a callback, mark the number as do not call, record a disposition or send an SMS. You write its instructions as text, pick the speech and language models, and then drop an AI Voice Agent node into an IVR. Open the page from Contact Center > Messages > AI Voice Agent.

The persona list shows Name, Description, LLM, Voice, Status and Operations ([Edit]). Top buttons: New AI Persona, Transcripts, Refresh. Delete Selected is under the table.

Creating a persona

Click New AI Persona. The form is in sections. There is also a section called Translation on this form; leave it on its default and ignore it for the purposes of this guide.

Persona

- Name: internal name, lowercase letters, digits and underscore only (validated on save). It is the name you will pick in the IVR node, so keep it short, for example sales_callback.
- Description: free text for the list.
- Active: Active or Disabled. Only active personas appear in the IVR node dropdown.

Behaviour

- Opening Greeting: the first sentence the agent speaks, as plain text. It is synthesised when the call starts.
- System Prompt (required): the full instruction to the language model. Role, goal, what it may and may not do, when to transfer. Tokens [contact:first_name], [contact:last_name], [contact:phone], [contact:email] and [campaign:name] are replaced with the contact and campaign of the call; on an inbound call with no contact record they are blanked and the sentence tidied.
- Enabled Tools: comma separated list of the tools the agent may call. Default: transfer, schedule_callback, mark_dnc, write_disposition. The full list is in the next section.
- Transfer Queue: the queue the transfer tool sends the caller to, for example ib_queue_12 (the queue of your agent campaign). Leave it empty and the agent cannot transfer.

Language Model

- Provider: Anthropic (Claude) or OpenAI (GPT).
- Model: typed in, for example claude-sonnet-4-6 or gpt-4o-mini. Default claude-sonnet-4-6.

- Temperature: 0.0 to 2.0, default 0.40. The on-screen hint says voice agents usually sit at 0.3 to 0.5; higher makes the agent wander.

Speech-to-Text

- Provider: OpenAI Whisper or ElevenLabs Scribe.
- Model: whisper-1 for Whisper, scribe_v1 for ElevenLabs.
- Language: a BCP-47 code such as en-US, ur, es-MX. Default en-US. Setting the real language of your callers noticeably improves recognition.

Text-to-Speech

- Provider: Piper (local, free) or ElevenLabs (cloud).
- Voice ID: for Piper the voice file basename (default en_US-amy-medium); for ElevenLabs the voice_id from your voice library.
- Model: ElevenLabs only, eleven_turbo_v2_5 or eleven_flash_v2_5. Ignored for Piper.

A wrong ElevenLabs voice id does not produce an error on the call; the server falls back to Piper and the call sounds unchanged. If your persona sounds like the default voice, check the id.

Limits

- Max Call Duration (sec): hard cap, default 600. The call is hung up when reached.
- Silence Timeout (ms): default 8000. After this much silence the agent prompts the caller again.
- Barge-in / Interrupt: Enabled or Disabled, default Enabled. Enabled lets the caller talk over the agent and the agent stops. Disabled is calmer on noisy lines or speakerphones.

Save, Reset and Cancel are in the top bar.

What each tool does

The agent only calls the tools listed in Enabled Tools, and only when the conversation calls for it, so the system prompt should say when.

Tool	What happens on the server
transfer	Blind transfer of the caller. The target is the Transfer Queue, or the agent can name ext: for one agent. Needs the caller to still be on the line, so the prompt should have the agent say “one moment” first.
schedule_callback	Reschedules the campaign call for a future date and time. Only works on an outbound campaign call; on an inbound call it returns an error that the agent will explain. The campaign must still be running at that time, and the slot expires 12 hours

Tool	What happens on the server
	after it. A Scheduled / Callback entry is written to the contact history.
mark_dnc	Adds the caller's number to your DNC list with the reason the agent gives.
write_disposition	Records an outcome. The agent's wording is matched to your disposition names (Sale, Interested, Not-interested, Invalid number, Scheduled / Callback, plus your own); if it matches, the contact's disposition and history are updated and the result shows in the Disposition Report. If nothing matches, the outcome is kept on the AI session only.
crm_lookup	Reads the local contact record (name, email, phone, address, custom fields), the last three dispositions, and whether a CRM record is linked. Lets the agent say "I see you spoke to us last week".
crm_update	Changes one field on the local contact: first_name, last_name, email, phone, address, role, stage, custom1, custom2 or custom3. Email and phone values are validated and the agent is told to ask again if they look wrong. It does not write to the external CRM on this version.
send_sms	Queues a text to the caller through your most recent active SMS campaign. With no active SMS campaign it fails and the agent is told so.
ivr_navigate	Reads menus from an external content platform. Only works when the administrator has configured that platform; leave it out otherwise.

Putting a persona on calls

The persona runs inside an IVR, so the steps are the same as for any IVR.

1. Contact Center > Messages > IVR, New IVR. Drag Call Answer, then the AI Voice Agent tile. Click its pencil: Persona (dropdown of your active personas) and Max Call Seconds (default 600, the node's own cap on top of the persona's). Apply. Link Call Started to Call Answer to AI Voice Agent, and the node's output to Call Hangup for when the conversation ends without a transfer. Save.
2. Outbound: Contact Center > Campaigns Management, Add new, choose either the AI Voice Agent card (same form as an Interactive Campaign, with a notice on top showing how many personas you have) or the IVR Campaign card, and pick that IVR. Start the campaign; each answered call is handed to the persona.
3. Inbound: create an IVR Campaign with that IVR, set Contact List Closure to Wait Inbound, start it, and forward the DID to the campaign (DID Forwarding, Usage = Forward to Campaign). The IVR Builder Guide has the full inbound procedure.

Transcripts

Click Transcripts on the persona page. AI Call Transcripts lists every AI call: Started, Persona, Direction, Caller, Duration, Turns, Disposition, Status and a [View] link. Status moves through starting, active, transferring and ends as ended or error.

[View] opens the call: a header with Session ID, Persona, Direction, Started, Ended, Duration, Turns, Status, Disposition, Caller and, if something broke, Error. Below it the conversation turn by turn, caller on the left and AI Agent on the right, with every tool call shown in between along with its arguments and result, and ERROR marked when the tool failed. This is the first place to look when a customer says “the bot did something odd”.

Writing a system prompt that works on the phone

Spoken calls are not chat. A few rules we have found hold up:

- One sentence per idea, and tell the model so: “Keep every reply under two sentences. Never read lists.” Long replies get interrupted and sound robotic.
- Give it a name, a company and a single goal. “You are Sara from Northline Clinic. Your only goal is to confirm or move the appointment.”
- Spell out the exits: when to call transfer (“if the caller asks for a human, or asks anything about billing”), when to call `schedule_callback`, when to call `mark_dnc` (“if they ask not to be called again, apologise, call `mark_dnc`, and end”). The tools are only used when the prompt says so.
- Tell it what it does not know. “You cannot see prices. If asked, offer a transfer.” Otherwise it will guess.
- Use the tokens. “The caller is `[contact:first_name]`” saves a question.
- Numbers and dates: ask the caller to repeat them, and have the agent read them back before calling `crm_update` or `schedule_callback`. Speech recognition on digits is the weakest link.
- Avoid markdown, bullet points and emoji in the prompt’s example phrases; they are stripped before synthesis but the model copies the style.

Testing before go-live

1. Make a contact group with two or three of your own numbers and a short IVR campaign on it, Conclude Campaign mode, Max. Concurrent Channels 1.
2. Call yourself. Use a handset or headset, not speakerphone; echo on a speakerphone triggers Barge-in / Interrupt on the agent’s own voice and it keeps stopping mid sentence. If your callers will mostly be on speakerphones, test with Barge-in / Interrupt set to Disabled.
3. Try the exits: ask for a human, ask for a callback tomorrow at ten, say “stop calling me”. Then open Transcripts and check each tool call shows a result and not ERROR.
4. Check Reports > Disposition Report for the `write_disposition` outcomes and CRM > Customer > Contacts for the `crm_update` changes.

5. Check the cost side: Max Call Duration (sec) caps a runaway conversation, and the Temperature and Model fields are where you trade quality against speed.

Only then point the real contact group at it, and keep Max. Concurrent Channels low for the first run.

Understanding the ICTContact Dashboard

The dashboard is the first page after Login as User. It is a status board, not a report: the numbers tell you what is running right now and how the server is coping, and the only top button is Refresh. Some blocks only show for the admin account; a client account sees its own campaigns and agents. We go through the page from top to bottom.

Counter cards

Three cards at the top: Campaign Launched (how many voice and fax campaigns this account has created), Contact Dialed (contacts dialed across those campaigns) and Online Time (total call time, shown as hours and minutes). These are lifetime totals for the account, not today's figures.

The admin account also gets Daily Profit, Monthly Profit and ALL Profit. Profit is what clients were charged (their plan rate) minus what the calls cost on the trunk, so the cards only make sense once rates and routes are set up under Billing.

System Status

Total Logged-in Users (admin only), Total Active Campaigns and Total Active Channels. Active Channels is the number of calls in progress on this node at the moment the page loaded.

Server Status and Node Statistics

Admin only. Server Status shows whether MySQL, Apache and Asterisk are up. Node Statistics shows CPU Usage %, Memory Usage % and Hard Disk Usage %. On a multi-node licence this becomes a table with one row per node and an Active Channels column.

Campaign Statistics and Call Statistics

Campaign Statistics (admin only) is a bar chart of calls per hour over the last 24 hours, split by dialing mode: Inbound, Predictive, Power Dialing, Manual and Broadcast.

Call Statistics is a chart with Day, Week and Month buttons. The series are Failed, Invalid, Dialed, Answered and Scheduled. Day shows the last 24 hours by hour; Week and Month widen the window. Click a button to switch; the data is already on the page, so there is no reload.

Recent Calls History

This table only appears once there have been calls. Columns: Contact Image, Contact Name, Contact Number, Agent, Elapsed Time (how long ago the call started, or Pending), Disposition and Call Note. Agent shows System when the call was not handled by a person, which is the normal case for a broadcast.

My Active Campaigns

One row per campaign that is active, starting or stopping. Columns: Campaign, Owner, Dialed, Answered, Failed, ActiveChannels and ChannelLimit. The action column has an Increase Limit and a Decrease Limit arrow around the current channel number, so you can throttle a running campaign without opening it, and a View Campaign Details link.

View Campaign Details opens a per-campaign page listing the live calls: Name, Phone, Status, Ring Time, Answer Time, Agent Name. Answered calls get [Hangup], [Listen], [Barge] and [End Monitoring] links, subject to your permissions. Use the Back button to return.

Agent Status Overview and Live Agent Statistics

Agent Status Overview shows five cards: Total Agents, Online Agents, On Break, In Call, Free Agents.

Live Agent Statistics is a table that refreshes itself every 5 seconds (the interval comes from the report refresh rate setting, 5000 ms on this node). Columns: Status, Agent, Logged Time, Handled, AHT, Held, Not Ready, Handle Time, Hold Time, Talk Time, Ring Time, Reserved, Occupancy, Break, Break-Reason, Current-Status and Operations. Operations shows the same [Hangup] / [Listen] / [Barge] / [End Monitoring] links when the agent is on a call, otherwise a dash. If you want the same figures over a date range rather than live, use Reports > Agent Statistics.

Logged-in Users

Admin only. Columns: User, Credit, ActiveChannel and ChannelLimit. ChannelLimit is the client's Max Allowed Channels from Client Management; ActiveChannel is what their campaigns are using right now.

What the dashboard does not show

There is no card row for total calls, average handle time, occupancy, abandon rate, conversion or queue wait, and no top agents table. Occupancy and AHT exist per agent in the Live Agent Statistics table; totals and history live under Reports.

ICTContact Reports Guide

Contact Center > Reports has six pages: Overview, CDR, Disposition Report, Call Recording, Live Statistics and Agent Statistics. Each one is a filtered table; the filter opens from the search button in the top bar (a magnifier icon), and the top bar also holds the Refresh, Export and Print buttons where the page supports them. Export writes a CSV of the rows that match the current filter; Print opens a plain copy in a new window. Dates in every filter are a date range picker.

Admin sees two extra filter fields on most pages, Company and Client, to narrow the rows to one tenant. A client account only ever sees its own rows. On this build the Company text field is labelled “Commpany” on the CDR and Agent Statistics pages; it is the same field.

Overview

Totals per campaign and time slice, which is the quickest answer to “what did yesterday cost”. Columns: Date / Time, Campaign, Total Calls, Amount (billed to the client), Net Amount, Total Cost (what the trunk charged), and an Action icon that opens the detail view for that row.

The filter is the same form as the CDR page (see below). The detail view lists the individual calls behind a total: Date / Time, First Name, Last Name, Contact, Amount, Rate, Cost, and a [Call Detail] link per call. Use Back to CDR Summary to return. Buttons: search, Export, Print.

CDR

One row per call attempt. Columns: Started At, Answered At, Ended At, Ended By, Company, Username, Service, Campaign ID, Campaign, Phone, First Name, last_name, Destinations, Provider, Rate, Cost, Status, Response. Provider is the trunk the call went out on; Response is the gateway’s result text, which is where you look when Status says failed.

Filter fields:

Field	Options
Company, Client	admin only
Campaign	[Any Campaign], [Standard Calls] (calls made outside a campaign, for example manual agent dials), or one campaign
Agent Number	[Any Agent / Extension] or one extension
Call Duration	a number of seconds plus greater than / less than
Call Type	Any Call Type, incoming, outgoing

Field	Options
Did	[Any did] or one DID (used with incoming)
Date	date range

Buttons: search, Refresh, Export, Print. The Reports column in Campaigns Management has a [CDR](#) link that opens this page already filtered to that campaign.

Disposition Report

What agents (or the AI agent) marked each call as. Above the table there are two charts: Disposition Distribution (Interested, Not Interested, Sale, Callback, Other, No Disposition) and Disposition Status. Columns: Date, Call-ID, Disposition, Comments, Phone, Contact Name, Agent Name, Campaign, Sentiment, Schedule Time, plus Username for admin, and an Action column with View Call Detail, Download Recording and Play Recording icons when a recording exists.

Filter fields: Client (admin), Campaign, Agent Number, Disposition ([Select Disposition] or one of the dispositions defined under Messages > Disposition), Phone Number, Call Duration (All Duration, 1 Minute, 2 Minutes, 3 Minutes, 4 Minutes, 5 Minutes, 10 Minutes, 30 Minutes with greater than / less than), Date. Buttons: search, Refresh, Export, Print.

Call Recording

Every call that produced a recording file. Columns: First Name, Last Name, Contact, Campaign Name, Date / Time, Operations. There is no agent column in the table; filter by Agent / Extension instead if you need one agent's calls. Operations has Download Recording, Play Recording (plays in the browser) and, when your role has the call reschedule permission, a Call Rescheduling icon. Reschedule offers After 10 Minutes, After 30 Minutes, After One Hour, Next Day, Next Week or [Custom Schedule] with a Date and At time, and puts the contact back in the campaign queue.

Filter fields: User (admin), Agent / Extension, Campaign, Customer Contact, Call Duration, Date. The filter has three buttons: Search, Search / Download and Reset. Search / Download zips every recording that matches the filter and sends you the archive, which is the way to pull a day's recordings in one go. The top bar has search and Refresh; there is no Export or Print on this page.

Live Statistics

Who is logged in right now. The page reloads itself every 5 seconds (report refresh rate, 5000 ms on this node), so leave it open on a second screen. Columns: Campaign, Agent, Extension, Status (Ready, or Not Ready with the break reason in brackets), Duration (how long they have been in that status), Logged At, Login Age, Operations. Operations has a single icon, Force logout this agent, for an agent whose browser went away without logging out. The only top button is Refresh; there is no filter and no export because the data is live.

Agent Statistics

The same counters as the dashboard's live table, but for a date range and per login session. Columns: Agent, Login, Logout, Logged Time, Handled, AHT, Held, Not Ready, Handle Time, Hold Time, Talk Time, Ring Time, Reserved, Occupancy, Break, Break-Reason. Times are durations in hours, minutes and seconds; Occupancy is handle time over logged time.

Filter fields: Company and Client (admin), Agent / Extension, Date. Buttons: search, Refresh, Export, Print.

Click the agent name or the login time in a row to open the Agent Detail Report for that session: Dialed At, Contact, Campaign, Connected At, Talk Time, Hold Time, Wrapup Time, Call Duration, Ended By, Ended At, and a [Call Detail] link per call. The detail page has its own Export and Print buttons and a Back button to the summary.

Which pages export

Page	Export	Print	Other
Overview	yes	yes	detail view per row
CDR	yes	yes	
Disposition Report	yes	yes	charts, play / download recording
Call Recording	no	no	Search / Download zips recordings
Live Statistics	no	no	auto refresh, force logout
Agent Statistics	yes (summary and detail)	yes	drill down per login

Supervisor Panel Guide

A supervisor is a login account with the Supervisor role. It gets one page, the supervisor panel, which lists the agents of its client and the calls they are on, and lets the supervisor listen to or barge into a call and force an agent out. It is meant for a team lead who should not be able to edit campaigns, see billing or pull reports. Here is how to create one, how they log in, and exactly what they can and cannot do.

Create a supervisor account

1. Log in as admin (or as the client whose agents the supervisor will watch) and open Administration > User Management.
2. Click New User.
3. Fill in User Name, and as admin pick Owned By: the client whose agents this supervisor should see. The panel is scoped to that client; a supervisor never sees another client's agents.
4. Set Status to Active and User Role to supervisor.
5. Enter Password and Retype Password. Pin Code is optional.
6. Under Personal Contact Info fill in Email (required), First Name, Last Name, Phone, Mobile, Street Address, Country. Under Locale Settings pick Timezone offset, Language and Theme.
7. Save. The user list shows Username, First Name, Last Name, Email, Company, Owner, Role and Status; the new row should say supervisor.

Rate Plan and Max Allowed Channels only appear on the form when billing is licensed and only for a brand new user; they belong to the client, not the supervisor, so leave them as they are.

Log in

On the login page click Login as Supervisor. Enter the Username and Password you just created and click Login. You land on superpanel.php. The same username also works with Login as User, but then the account gets the normal portal with only the Dashboard entry in the menu, so always use the supervisor button.

What the panel shows

The page reloads itself every 5 seconds (the report refresh rate setting, 5000 ms on this node). The top bar has a Refresh button if you do not want to wait. The header links to Profile and Logout.

Agents table. One row per agent of the client who is logged in to the agent panel. Columns: Campaign (the campaign the agent has joined, blank if none), Agent, Extension, Status (Ready, or Not Ready with the break reason in brackets, for example Not Ready (lunch)), Duration (how long they have been in that status), Logged At, Login Age, Operations.

Active Calls table. One row per call in progress for this client's campaigns. Columns: Contact Name, Agent Name, Phone, Status, Ring Time, Answer Time, Operations.

What a supervisor can do

- Listen: on an answered call, click [Listen] to hear both sides without being heard. This needs the call listen permission, which the stock supervisor role has.
- Barge: click [Barge] to join the call so both the agent and the customer hear you. Needs the call barge permission, which the role has.
- End Monitoring: click [End Monitoring] to drop out of a call you are listening to or barged into.
- Force Logout: in the Agents table click [Force Logout] to log an agent out of the queue, for example when their browser crashed and the queue still thinks they are available. Needs the extension update permission, which the role has.
- See the Dashboard entry in the menu; it points back to this panel.

Listening and barging use the browser phone built into the page, so allow the browser to use audio when it asks. The stock role also carries the call whisper permission, but there is no whisper link on the panel on this build; the links are Listen, Barge and End Monitoring.

What a supervisor cannot do

Say this to your team leads up front so they do not go looking for it:

- No [Hangup] link. The hangup action needs the campaign update permission, which the supervisor role does not have, so the link is not shown.
- No campaign editing. The role carries campaign list, start, stop, resume and status permissions, but the panel has no campaign controls and the menu has no Campaigns Management entry, so in practice supervisors do not start or stop campaigns.
- No reports. No CDR, Overview, Disposition Report, Call Recording, Live Statistics or Agent Statistics.
- No contact groups, leads, deals, quotes or invoices, no IVR or recordings, no billing, no gateways, no user or client management, no extension creation.
- No view of other clients. The panel filters on the client the supervisor is owned by.

If a supervisor needs any of that, give them a second login with the user role, or ask the admin to extend the supervisor role's permissions.

Disposition Management Guide

A disposition is the outcome an agent records when a call ends: Sale, Not-interested, callback requested, and so on. You define the list under Contact Center > Messages > Disposition, agents pick one in the agent panel after each call, and the result turns up in the Disposition Report, on the contact's timeline and in the CRM analytics. Dispositions can also move a lead through the CRM automatically, which is what the CRM Automation section on the form is for.

The five built-in dispositions

Every account starts with five global dispositions. They are marked Not Editable in the list and cannot be changed or removed by a tenant.

Title	Description	Default lead action	Default score change
Sale	Customer successfully converted to sale	Convert to Deal (won)	+20
Interested	Customer showed interest	Convert to Contact	+10
Not-interested	Customer not interested	Mark as Junk Lead	-10
Invalid number	Wrong or unreachable number	Mark as Junk Lead	-20
Scheduled / Callback	Customer requested callback	Create callback task	+5

The last two columns are what happens when you leave the CRM Automation fields at their defaults; see below.

Adding your own

The list page shows Title, Description and Operations (Edit on your own rows, Not Editable on the global ones). Top buttons are New Disposition and Refresh. Tick rows and click Delete Selected to remove them; deleted dispositions are hidden, not purged, so old reports keep their names.

1. Click New Disposition.
2. Under Disposition enter a Title (required) and a Description.
3. Under CRM Automation choose Lead conversion and, if you want, a Score adjustment.
4. Click Save.

Lead conversion has these options:

-

- No action
- Convert to Deal (won): the lead is marked Converted, a Deals record is created in status Processed, and the record's Stage is set to Deal Won.
- Convert to Contact: the lead is marked Converted and a Contacts record is created in status In Progress.
- Create callback task: writes a task named "Callback #" dated today with a deadline of tomorrow into the tasks table. There is no task screen in the current menu, so treat this as a database record for now.
- Mark as Junk Lead: sets the lead's Status to Junk Lead.

Conversion only fires when the record the agent dispositioned is a lead (something listed under CRM > Leads). Contacts and deals get the score change and the history entry but are not converted.

Score adjustment is a whole number such as 10 or -5 that is added to the contact's Lead Score every time the disposition is used. Leave it empty and the default from the table applies (0 for custom titles). You can see the running score on the Leads list (Score column) and on the contact timeline card.

How an agent sets a disposition

In the full-page agent panel the Contact Update tab holds the wrap-up form. After a call the agent:

1. Picks a value in Disposition (the dropdown starts at [Select a Disposition] and lists the five global ones plus your own).
2. Types anything useful in Comments.
3. If the customer wants a callback, sets Re Schedule. The choices are After 10 Minutes, After 30 Minutes, After One Hour, Next Day, Next Week and [Custom Schedule]. Custom shows a Date picker and an At hour:minute pair.
4. Clicks Save.

Saving writes the disposition onto the contact, adds a contact_history row with the comments, records a spool result for the campaign, adjusts the score and runs the lead conversion. If a reschedule was chosen the same spool entry is set back to pending_retry at the chosen time and expires 12 hours after it; the campaign dials it again when that time comes. The disposition save also assigns the agent to the contact, which is what the Assigned Agent filter on the Leads and Contacts lists uses.

Agents cannot create dispositions; the list they see is whatever the account owner defined.

Where the results show

Reports > Disposition Report. One row per dispositioned call with the columns Date, Call-ID, Disposition, Comments, Phone, Contact Name, Agent Name, Campaign, Duration, Sentiment, Schedule Time, Username and Action. The Action icons are View Call Detail, and Download Recording and Play Recording when a recording exists. The search panel filters

on Campaign, Agent Number, Disposition, Phone Number, Call Duration and Date (admins also get Client). Top buttons are search, Refresh, Export (CSV) and Print, with Back to Report on the print view.

Above the table there is a Disposition Distribution chart and a Disposition Status strip with Total Calls, Success Rate (the share marked Interested), AVG, Handle Time (AHT) in seconds, and Conversion Value.

Sentiment is not an AI rating. It is a colour derived from the global disposition name: Green for Sale and Interested, Red for Invalid number, Yellow for Not-interested and Scheduled / Callback. Custom dispositions always show Yellow.

Contact timeline. Open a lead, contact or deal and click Timeline (or the first icon in the row). Each disposition appears as an entry titled “Disposition” plus the name, with the comments underneath, next to calls, notes and messages. The card at the top shows the current Status, Stage, Assigned Agent and Lead Score.

CRM > Analytics. The Dispositions (last 30 days) card counts uses per disposition, and Conversions (last 30 days) counts how many leads were converted to deals or contacts by dispositions in that window.

Things to know

- Renaming a global disposition is not possible; if you need “Sale” to mean something else, create your own title and set its automation explicitly instead of relying on [Default by name](#).
- Score and conversion are evaluated at the moment the agent saves. Changing the automation later does not rewrite past calls.
- The Disposition form on this build has no integration fields. To push a result to a CRM, attach an Integration to the campaign or IVR instead (see the CRM Integrations Guide).

Lead Management Guide

Leads are the records you have not qualified yet. They live under the CRM menu in three screens: Lead Groups (the lists you dial), Leads (the records themselves) and DNC Lead (numbers you must never dial). A lead, a contact and a deal are all rows in the same contact table; what separates them is a type marker, so a lead can be converted to a contact or a deal without re-entering anything, usually by a disposition (see the Disposition Management Guide).

Lead Groups

CRM > Lead Groups lists Group Name, Description, Total Leads, Total CNAM and Operations. Top buttons are search, Add new and Refresh. The row icons are Edit Lead Group, View leads in this group, Search and delete unwanted leads from this group (the filter), Start a process to create or update CNAM database for this group, and Drop all CNAM records associated with this group. While a CNAM run is active the start icon is replaced by Stop CNAM update process.

Create a group and load leads

1. Click Add new.
2. Under Group Description enter Title (required) and Description. Group Type has one option, Internal Leads.
3. Under Import Leads (Optional) choose a Type of Source:
 - Upload Lead via standard file: a CSV in the sample layout (Example File link: [Lead_sample.csv](#)). Columns are phone, first name, last name, email, address, then up to eight custom values.
 - Upload Lead via custom file: any CSV. Set Column Separated By (default comma), Column Enclosed By (default double quote) and Rows to Skip (default 0). After Save you land on Map Lead fields with CSV, where each CSV Column # has a dropdown of lead fields or [ignore this field], with sample data beside it. Save again to import.
 - Copy Leads from existing Groups: pick one or more Source Groups.
4. Under Scan for CNAM choose Fetch CNAM Data if you want the CNAM provider queried after the import; otherwise leave Don't fetch.
5. Click Save.

Filter (search and delete)

The funnel icon opens a form that deletes leads matching your criteria from that group. Contact Filter: Phone number (Invalid or no phone number), Email address (Invalid or no email address). CNAM Filter: CNAM Record (Invalid or no CNAM record, No CNAM record,

Invalid record), Contact Type (Landline, Wireless / Mobile, Pager, VoIP, Other), Ported Contacts (Ported, Not ported). Filter contacts: Do Not Call Registry (DNC) (Listed in DNC), Duplicate Contacts (Duplicate phone numbers, Duplicate email address) and Which copy of duplicate (Older copies, Newer copies). Each dropdown defaults to [doesn't matter]. The CNAM filters only do something if the group has been scanned.

Leads

CRM > Leads shows every lead across your groups. Columns: Profile Image, First Name, Last Name, Phone, E-Mail, Role, Status, Score and Operations. The Operations icons are View activity timeline, Edit Lead, View CNAM record (only when one exists) and Update CNAM record. Delete Selected removes ticked rows.

Top buttons: search, Add new, Import, Export (CSV of the current filter), Timeline, Refresh. On the edit form you get Save, Reset and Cancel.

The search panel filters on Lead Group, Name, Phone, E-Mail, Tag, Assigned Agent, Filter ([No Filter], [Invalid Contacts], [Duplicate Contacts]) and Date. Admins also get Client. Saved Segment, Segment action (Apply or Delete) and Save search as let you keep a filter under a name and reuse it.

The [Duplicate Contacts] filter switches to a view listing First Name, Last Name, Phone, E-Mail and Date with the buttons Delete Selected, Delete Duplicate (keep latest) and Delete Duplicate (keep old).

Lead form

Add new and Edit use the same form.

- Profile Picture: Profile Image (JPG, PNG or GIF).
- Personal Information: First Name, Last Name, Status, Salutation (Mr., Mrs., ms., Dr.).
- Client: Phone Number (required, digits only), E-Mail, Address, Company (a dropdown of records from CRM > Customer > Company), Client Role (the person's position, for example CEO).
- Messenger: pick Chat Message, Whatsapp or Skype and type the handle or URL. Add ... reveals another row.
- Groups: Related Groups (multi-select of your lead groups) and Tags (comma separated, for example vip, callback, urdu).
- Consent: Email consent, SMS consent (Unknown, Yes, No) and Consent source, a free-text note of where the consent came from.
- Additional Data appears only when extra fields have been configured for the account.

Status has four values: Unassigned, In Progress, Processed and Junk Lead. Nothing changes it automatically except a disposition set to Mark as Junk Lead (or a conversion, which marks the old lead Converted and creates the contact or deal record).

Score is the Lead Score. It starts at 0 and moves whenever an agent dispositions the lead: by default Sale +20, Interested +10, Scheduled / Callback +5, Not-interested -10, Invalid

number -20, or whatever Score adjustment you set on the disposition. The list sorts by Score descending if you click the header.

Import

The Import button opens the same import form as the group wizard: Import Lead From (Type of Source, Upload lead's File, Example File, Source Groups), CSV Format for custom files, then Import Leads Into with a required Target Group and Fetch CNAM Data.

Lead versus contact

CRM > Leads and CRM > Customer > Contacts use the same form and the same import and filter screens; the differences are in what the list shows and what can happen to the record.

- The Leads list has the Score column; the Contacts list does not. Both show Status.
- The Contacts list has a Move Selected to DNC button; the Leads list only has Delete Selected.
- Dispositions convert leads. A contact that receives a Sale disposition gets the score and the history entry but is not converted again.
- Quotes and Invoices can be raised against a Lead, a Deal or a Contact (the Source field), so you do not have to convert first.

Lead Groups are what you select as the contact list when you create a campaign, in the same way as Contact Groups.

DNC Lead

CRM > DNC Lead is the do-not-call list. Numbers here are skipped by campaigns and can be stripped out of a group with the DNC option in the group filter. Top buttons: search, Add new, Import, Export, Refresh. Columns: First Name, Last Name, Phone, E-Mail, Operations (Edit DNC). Delete Selected removes ticked rows.

There are two lists. User DNC Group belongs to your account; Global DNC Group applies to every account on the system. The DNC Group selector (both on the form and in the search panel) only appears for users holding the global DNC permission; everyone else works in their own list.

Add one number

1. Click Add new.
2. If you see the DNC Group fieldset, choose [User DNC Group] or [Global DNC Group].
3. Fill in Personal Information (First Name, Last Name), DNC Addresses (Phone Number, E-Mail, Address) and, under Comments / Remarks, a Description.
4. Click Save.

Import a file

1. Click Import.
2. Choose Import into ([User DNC Group] or [Global DNC Group]) if the field is shown.
3. Upload DNC File in the layout of the Example File (dnc_sample.csv): phone, first name, last name, email, address, comments.
4. Click Save.

The search panel filters on Name, Phone, Email, DNC Group and Date.

Agents can also push a number onto the list from a call: the contact list screen has Move Selected to DNC, and the Interactive and Integration campaign types have an Action on DNC option that lets the called party press 9 to be removed.

Sales and CRM Guide: Deals, Quotes, Invoices

The Sales section of the CRM menu tracks what happens after a lead says yes. Deals carry an amount, a stage and two dates and can be viewed as a list, a pipeline board or a calendar. Quotes and Invoices are line-item documents you build from the Product catalogue and download as PDF. Analytics sums it all up. The screens are: CRM > Sales > Deal Calendar, Deals, Deal Groups, Quotes, Invoices; CRM > Product; CRM > Analytics.

Deal Groups

CRM > Sales > Deal Groups works the same way as Lead Groups and Contact Groups: a named list that a campaign can dial. Columns are Group Name, Description, Total Deals, Total CNAM and Operations (Edit, View deals, Filter, Start CNAM or Stop CNAM, Drop CNAM). Add new gives you Title, Description, Group Type (one option, Internal Deals), Import Deals (Optional) with the usual file, custom file or copy-from-group sources, and Scan for CNAM.

Deal Groups is not where pipeline stages are defined. The stage list is fixed in the current build (see below).

Deals

CRM > Sales > Deals. Top buttons: search, Add new, Activity, Board, Import, Export, Timeline, Refresh. The list shows First Name, Last Name, Phone, E-Mail, Status and Operations (View activity timeline, Edit Deal, View CNAM record when present, Update CNAM record). Delete Selected removes ticked rows.

The search panel has Deal Group, Name, Phone, E-Mail, Tag, Assigned Agent, Filter ([No Filter], [Invalid Contacts], [Duplicate Contacts]), Date, Saved Segment, Segment action and Save search as. Admins also see Client.

Deal form

- Personal Information: First Name, Last Name, Status (Unassigned, In Progress, Processed, Junk Lead), Salutation.
- Deal Details: Stage, Start Date, End Date, Amount, Currency (, €, ¥, R, ₹).
- Client: Phone Number (required), E-Mail, Address, Company.
- Messenger: Chat Message, Whatsapp or Skype plus the handle; Add ... for more rows.
- Groups: Related Groups and Tags.
- Additional Data when extra fields are configured.

There is no product field on a deal. Products are attached on a quote or an invoice, where the Source can point at the deal.

The deal's name on the board and in the Activity view is First Name plus Last Name, so for a company deal put the deal title in First Name.

Stages

Stage has eight values in this order: New, Create Papers, Invoice, In Progress, Final Invoice, Deal Won, Deal Lost, Analyze Failure. Deal Won counts as won; Deal Lost and Analyze Failure count as lost. The stages are stored per account in the database and there is no screen to add or rename them on this build. A disposition set to Convert to Deal (won) creates the deal straight into Deal Won.

Board (kanban)

The Board button opens the Pipeline Board: one column per stage, each header showing the number of deals and the sum of their amounts, and one card per deal with the name, the amount with currency and the phone number. Drag a card to another column to change its stage; the change is saved immediately, no Save button. Clicking a card opens the deal's timeline. The board loads up to 500 deals. Buttons on this view: Add new, Refresh, Activity, Go back.

Activity

The Activity button lists "Activity - Deals Nearing Due Date": open deals (anything not in Deal Won, Deal Lost or Analyze Failure) whose End Date is within the next 7 days or already past. Columns are Deal Name, Stage, Due Date, Days Left and Status, where Status is a badge: Overdue (with the number of days), Due Today, Urgent (3 days or less) or Upcoming.

Deal Calendar

CRM > Sales > Deal Calendar draws every deal that has a Start Date on a month calendar. A green marker sits on the Start Date and a red one on the End Date. Clicking a marker shows the deal name, amount, stage and the date, labelled START DATE or END DATE. Buttons: Add new (opens the deal form) and Refresh. Deals without a Start Date do not appear.

Products

CRM > Product is the catalogue that quotes and invoices pick from. Columns: Product Image, Product Name, Product Type, Product Description, Product Price, Operations. Top buttons: search, Add new, Import, Export, Refresh.

The form, under Product Information: Product Name, Product Type (virtual / IT product, Physical), Product Image (PNG, JPG, GIF), Subscription (One Time, Monthly, Bianny,

Annually), Product visibility (Active, Inactive), Unit & Quantity (Metre, Litre, Gram or Kilogram plus a quantity), Currency (, €, ¥, R, ₹), Price, Product Description. The search panel filters on Name, Filter and Date.

Quotes

CRM > Sales > Quotes. Top buttons: search, Add new, Refresh; on the form Save, Reset and Cancel. The list has Quotes #, Quotes Stage, Company Name, Source, Deal/Lead/Contact, Product Name and Operations. Delete Selected removes ticked rows.

The two row icons are View, which renders the quote as a PDF in a popup, and Download, which saves the same PDF. There is no Edit icon on a quote row, so get the content right before saving or delete and recreate.

Creating a quote

1. Click Add new.
2. Under Quotes Information enter Quotes # (free text, not generated), pick Quote Stage (new, Sent to Client, Accepted, Decline, Analyze Decline), and a Subject.
3. Set Source to Lead, Deal or Contact. A matching dropdown appears (Leads, Deals or Contacts) listing the groups of that type; pick the group that holds the record.
4. Pick the Company.
5. Write the proposal text in Purposal (a rich-text editor).
6. Under Product choose a product in Products; Price fills in from the catalogue. Enter QTY and Discount %; Total Amount is calculated. Click Add ... for another line.
7. Click Save.

What the quote does not do: it does not email anything, and it does not turn into an invoice. "Sent to Client" is a stage you set by hand after you have sent the PDF yourself. The code contains a "Quotes To Invoice" page, but nothing in the interface links to it, so in practice you raise the invoice separately.

Invoices

CRM > Sales > Invoices mirrors Quotes with the same buttons and the same form: Invoice Information (Invoice #, Invoice Stage with the same five values new, Sent to Client, Accepted, Decline, Analyze Decline, Subject, Source, Leads/Deals/Contacts, Company) and the Product lines (Products, QTY, Discount %, Total Amount, Add ...). The list shows Invoice #, Invoice Stage, Company Name, Source, Deal/Lead/Contact, Product Detail(Name - Price - QTY - Total) and Operations (View and Download, both PDF).

There is no paid, unpaid or partially paid status on an invoice, no payment recording and no email sending. If you need to track payment, use the Subject or the stage by convention.

Analytics

CRM > Analytics is a read-only page with a Refresh button. Non-admin users see their own records; admins see everything. The cards are:

- Pipeline value by stage: a table of Stage, Deals and Value with a Total row.
- Win rate: the percentage of closed deals that are won, with “won / lost of closed deals” and Won value underneath. Closed means Deal Won, Deal Lost or Analyze Failure.
- Lead funnel: a count of Leads for each Status value present in your leads (Unassigned, In Progress, Processed, Junk Lead, and Converted for leads a disposition has turned into a contact or deal).
- Conversions (last 30 days): Converted to (deal or contact) and Count, from dispositions that converted a lead.
- Dispositions (last 30 days): Disposition and Count.
- Messaging engagement (last 30 days): per Campaign, Sent, Delivered, Opened, Clicked, Bounced, Unsubscribed. This stays at “No message events yet” until tracked SMS or email campaigns have run.

CRM Integrations Guide

ICTContact talks to a CRM in two separate directions, and they live on two different screens. Pulling contacts out of a CRM into a contact group is done under CRM > Customer > Contact Groups. Pushing call results back into a CRM, or into any other web service, is done under Contact Center > Messages > Integrations. You can use either one on its own.

Direction 1: import contacts from a CRM into a Contact Group

A contact group has a Group Type. The default is Internal Contacts, which is a plain list you fill from a CSV file or from another group. The other types are CRM feeds: when you pick one, the form shows that CRM's connection fields and ICTContact fetches the records from the CRM itself.

1. Go to CRM > Customer > Contact Groups and click Add new.
2. Under Group Description fill in Title and Description.
3. Set Group Type to the CRM you want. The list contains Internal Contacts plus the CRM entries your account has permission for (see the connector list below).
4. Fill in the fieldset that appears for that CRM. The fields are the CRM's own API settings. Three examples from the code:
 - Zoho CRM Feed Configuration: Accounts URL (default <https://accounts.zoho.com>), API Base (default <https://www.zohoapis.com/crm/v6>), Client ID, Client Secret, Refresh Token, Module (Contacts or Leads), Page Size (max 200), Import Limit (0 = unlimited).
 - Pipedrive Feed Configuration: API Base URL (default <https://api.pipedrive.com/api/v1>), API Token, Import Limit (0 = unlimited), Page Size (default 100).
 - Salesforce Feed Configuration: Login URL, Consumer Key, Consumer Secret, Refresh Token, API Version, Object (Contact or Lead), Page Size (LIMIT), Import Limit (0 = unlimited). SuiteCRM asks for Base URL, Grant Type (Client Credentials or Password), Client ID, Client Secret, Username and Password (password grant only), Module, Page Size and Import Limit. Agile CRM asks for Subdomain, Login Email and API Key. Most connectors follow one of these two shapes: OAuth refresh token, or a static API key.
5. Click Save.

Two things catch people here.

The Import Contacts (Optional) and Scan for CNAM sections disappear as soon as you choose a CRM type. That is expected: a CRM group is filled by the feed, not by a file.

Saving the group does not contact the CRM. The fetch runs when a campaign that uses this group starts: the campaign daemon calls the feed, pulls records page by page up to the Import Limit, normalises the phone numbers, writes the contacts, links each one to the CRM record in `contact_link` (remote id and module), and puts them in the campaign spool. If the credentials are wrong you find out in the campaign log, not on the group form. Check `logs/campaign-<id>/daemon.log` and `logs/gui.log` for lines starting with `Creating instance of` and `Loading feed`.

Group Type is locked after the first save. To switch a group from Internal to a CRM feed, create a new group.

Lead Groups and Deal Groups do not offer CRM types. Their Group Type list has one entry (Internal Leads, Internal Deals).

Direction 2: push call results with an Integration

An Integration is a saved outbound request. The campaign daemon runs it at the end of a call, filling in tokens such as the contact's phone number and the call status. You create it once under Contact Center > Messages > Integrations and then attach it to a campaign, a feedback option or an IVR node.

The list shows Integration Name, Type, Description and Operations (Edit). Top buttons are search, New Integration and Refresh; the form has Save, Reset and Cancel. Delete Selected removes ticked rows. The search panel filters on Integration, Integration Type and Date.

Creating an integration

1. Click New Integration.
2. Under Integration Info enter Integration Name (required), choose Integration Type and add a Description if you like.
3. Fill in the fieldset for the chosen type (details below).
4. Click Save.

Integration Type cannot be changed after saving; the field becomes hidden on the edit screen. Create a new record if you picked the wrong type.

The three built-in types

SOAP WSDL API. Integration Configuration has WSDL URL, SOAP Action, and nine Parameter# rows (Name / Value). For each row you type the parameter name and either pick a token from the value dropdown or choose Custom value and type your own text. The Show available tokens link lists what you can insert. Request parameters and the SOAP reply are written to `logs/gui.log` as `Soap request parameters:` and `Soap results:`; a SOAP fault is logged as `Soap error!`.

Custom Http request. Fields: Remote URL, Http Method (GET, POST, PUT, DELETE), Request data, Request headers, Response encoding (Plain or JSON Encoded). The insert

token button next to Remote URL and Request data drops a token at the cursor. Request data is sent only for POST and PUT. Put one header per line in Request headers, for example `Content-Type: application/json`. Response encoding is stored but not applied in the current code; the reply is logged as text either way. You will see `Http request url:`, `Http request body:` and `Http results:` in `logs/gui.log` for every run.

Queue for callback. Callback Configuration has Callback Campaign (a dropdown of your campaigns), Schedule After and Expiry After (both duration pickers). When it runs, the contact is inserted into the selected campaign as a new spool entry, and if the call came through an agent the same extension is kept on the new entry. Useful for “call me back later” from a survey or an IVR key press. The log line is `Callback saved as spool_id: .`

The CRM connectors

These are the connector types registered in `integration.php` on the current build, in the order they appear in the Integration Type list: Agile CRM, ActiveCampaign, Apptivo CRM, Capsule CRM, Close CRM, Copper CRM, Creatio CRM, Dynamics 365, Freshsales, Keap (Infusionsoft), Less Annoying CRM, Monday.com, Streak CRM, YetiForce CRM, Zendesk Sell, Vtiger CRM, SuiteCRM, Salesforce, Zoho CRM, SugarCRM, Pipedrive. Each entry appears only if the matching permission is granted to your user, so a tenant may see fewer than 21.

Each connector shows a fieldset named “ Configuration”. The fields are the CRM’s API credentials plus a module choice. Examples:

Connector	Fields
Zoho CRM	Accounts URL, API Base, Client ID, Client Secret, Refresh Token, Module (Contacts / Leads)
Salesforce	Login URL, Consumer Key, Consumer Secret, Refresh Token, API Version, Default Object (Contact / Lead)
Pipedrive	API Base URL, API Token, Custom Status Field Hash (optional), Create Pipedrive Activity for each call (Yes / No)
SuiteCRM	Base URL, Grant Type, Client ID, Client Secret, Username and Password (password grant only), Default Module (Contacts / Leads)
Agile CRM	Subdomain, Login Email, API Key

What a CRM connector does on each call, in order: it receives the contact id, campaign id, spool id, call status and disposition id from the daemon; it reads the local contact (name, phone, email), the campaign name, the agent and the disposition with its comments, call duration and recording URL; it looks for the CRM record using the remote id already stored in `contact_link` (set when the contact was imported from that CRM), otherwise by phone, then by email; if nothing matches it creates the record; then it updates the record and

adds a note or activity carrying the call result, and stores the new remote id back in `contact_link` so the next call does not have to search again.

Disposition mapping. Before sending, the connector translates the ICTContact disposition name through the `crm_disposition_map` table (scope `integration`, keyed by the integration id). If no mapping row exists the ICTContact name is sent unchanged. There is no screen for this table on the current build; the mapping is maintained in the database. Pipedrive additionally needs the Custom Status Field Hash filled in before it writes the mapped value to a custom field; leave it blank and only the activity is created.

Connector log lines are prefixed with the type in capitals, for example `[ZOHOCRMHTTP]`
`authenticate FAILED http=401`, and go to `logs/gui.log`.

Where an integration is attached

The Integration list only stores the request. Nothing runs until a campaign or IVR refers to it.

Integration Campaign (Contact Center > Campaigns Management > Add, card “Integration Campaign” under Voice Broadcasting). This campaign type plays recorded offers and sends the recipient’s response to your API. Its wizard has Integration Offers (number of offers, then for each offer an ID, Introduction and Detail recording), the general messages (Greeting message, Offer end message (main menu), Detail end message (sub menu), Confirmation message, Thanks message, Wrong message), and the fieldset Integration APIs with one required field, Integration, where you pick the saved record. Dial method is fixed to automatic for this type.

Feedback Campaign (SMS). Each feedback option row has Description, Filter Keywords and an Action / Integration dropdown. When an inbound reply matches the keywords, that integration runs.

IVR node “Integration API” (Contact Center > Messages > IVR, designer toolbox). The node’s only setting is Integration. Any IVR Campaign using that IVR, or a DID whose DID Forwarding target is that IVR, triggers it when the call reaches the node.

The generic campaign wizard has no integration field of its own on this build (the old “Request (Call End)” step is disabled in the code), and the Disposition form has no integration fields either. If you want a result pushed after an agent call, route the campaign through an IVR with an Integration API node or use an Integration Campaign.

Troubleshooting

- Nothing arrives at the CRM. First confirm the integration is attached somewhere (see above). Then open `logs/gui.log` and search for the integration’s request lines; if there are none, the daemon never called it. If there are, the reply body is logged right

after and usually names the problem (401 for bad credentials, 404 for a wrong base URL).

- OAuth connectors (Zoho, Salesforce, SuiteCRM, Dynamics 365 and others using a refresh token) log `authenticate FAILED` when the refresh token has been revoked. Mint a new one in the CRM and paste it into the integration.
- A CRM feed group stays at zero contacts. The pull runs on campaign start, not on save. Start a campaign with that group and read `logs/campaign-<id>/daemon.log`.
- The disposition shows in the CRM under the ICTContact name. That is the default; add rows to `crm_disposition_map` if the CRM needs its own values.
- Custom Http request with POST sends nothing. Request data is only used for POST and PUT; check the Http Method and that the body uses tokens the insert token list knows.
- Integration executes but the row is not found in the CRM. The lookup is by stored remote id, then phone, then email. Phone numbers are compared after stripping everything except digits, so a CRM that stores numbers with a different country prefix will not match and a new record is created instead.

Open source tools

ICT Innovations also publishes an n8n node for ICTContact, the ICTAgent Chrome extension and tvbench as open source at github.com/ictinnovations. They connect to this same REST and integration surface and are maintained separately from the product.

FAX Documents Guide

Before a Fax Campaign can send anything you need a document in the library. Contact Center > Messages > FAX Documents is that library: you upload a file once, ICTContact converts it to a fax-ready TIFF at the quality you choose, and every Fax Campaign picks from the resulting list. The same screen also holds the Fax Disclaimer settings.

The list

Columns are Document Name, Length, Quality, Description and Operations. Length is the page count of the converted TIFF, filled in after the upload, so it is a quick check that a multi-page PDF came through whole. Quality is the setting you chose on upload. The two Operations icons are Edit Document and View Document; View opens a small popup with the first page rendered as an image.

Top buttons: search, New Document, Refresh and Fax Disclaimer. On the form you get Save, Reset and Cancel. Delete Selected removes ticked documents.

The search panel filters on Document (a dropdown of names), Length, Quality and Date.

Adding a document

1. Click New Document.
2. Under Document enter Document Name and Description. The name is required and may only contain letters, digits and underscores; spaces and other characters are rejected, and the name must be unique within your account.
3. Under FAX Document choose Fax quality.
4. In File Name pick the file to upload (required).
5. Click Save. Conversion happens during the save; large PDFs take a few seconds.

Editing a document re-runs the same form. A new file is required on every save, so to change only the description you still have to pick the file again.

Quality options

Option	Resolution used for the TIFF
Standard	204 x 98 dpi
Fine	204 x 196 dpi
Superfine	204 x 391 dpi

Standard is enough for text. Fine is the safe choice for anything with small print or logos. Superfine doubles the vertical resolution again, which makes the fax take longer to

transmit and some receiving machines fall back to Fine anyway. We normally leave it on Fine.

Accepted file types

PDF, TIFF (.tiff or .tif), plain text (.txt), HTML (.html or .htm) and JPEG (.jpeg or .jpg). Anything else is refused with “Not a recognized file type”. Every upload is converted to a black-and-white Group 3 TIFF: a PDF is rasterised through Ghostscript, a TIFF is passed through, text is printed to PostScript first, and a JPEG is converted to monochrome. Colour and greyscale are lost, so check the preview if the original relied on shading.

Fax Disclaimer

The Fax Disclaimer button opens the Fax Disclaimer Messages page. A disclaimer is itself a document from this library, typically a one-page cover or footer sheet.

- Default Disclaimer: the document used when a campaign does not choose one.
- Available Disclaimers: a multi-select of the documents that may be offered as disclaimers in the campaign wizard.

Both fields are required once you open the page, so upload the disclaimer document first. Buttons are Save, Reset, Refresh and Back. The note on the page about “the body part of the selected document” is inherited from the email template screen and does not apply to fax. On a fax call the disclaimer is transmitted as a second document straight after the main one, on the same call.

Using a document in a Fax Campaign

1. Contact Center > Campaigns Management > Add, then the Fax Campaign card under Fax SMS, Email, & Video Broadcasting.
2. In the FAX Campaign Configuration step choose the FAX Document (required). If your account has the disclaimer permission, a Fax Disclaimer dropdown appears as well; it starts at Select a Disclaimer unless the system is set to enforce a disclaimer, in which case you must pick one.
3. In the settings step set Max. Concurrent Channels, Max. Retries (or [Disabled]), Suggested dialing order, Max. Call Duration in seconds and Max.ring time in seconds.
4. Finish the wizard as for any other campaign and start it.

Fax campaigns have no Inbound mode; the Campaign Mode list leaves it out. Max. Call Duration in seconds is pre-filled from the system default (600 seconds on a stock install) and Max.ring time in seconds with 45. Raise the duration for long documents, and remember a disclaimer adds its own pages to the same call. The pages actually transmitted are recorded against the call and, where the fax service is billed per page, become the call amount.

Billing, Routes and Rate Plans Guide

Four pages under Contact Center > Billing do all the money and routing work: Payments, Routes, Rate Plans and Rates. They fit together like this. A Rate Plan is assigned to a client. Rates belong to a plan and a destination, and say what that client pays per unit when calling that destination. Routes map a destination to a trunk, so the dialer knows where to send the call. When two trunks serve the same destination the trunk's Weight breaks the tie. Payments add credit to the client's balance, and every call takes its cost (from the rate) back off. Set them up in the order below; a campaign will not dial a number that has no route, and a client with a plan that has no rate for the destination has nothing to be charged.

Rate Plans

A plan is a named price list. Click New Rate Plan. Fields: Rate Plan Name, description, and a Permissions fieldset with Permission Group (a select, [All Permissions] or one group) that filters a Permissions multi-select. Save. The list shows Rate Plan Name, Description and Operations (Edit Rate Plan), with a filter on Rate Plan and Delete Selected for ticked rows.

You assign the plan on the client form (Administration > Client Management, field Rate Plan). Changing a client's plan takes effect on the next call; it does not re-rate old CDRs.

Rates

One rate per plan, service and destination. Click New Rate. The form has these fieldsets:

Fieldset	Fields
Rate	Name, Rate Plan, Services (Voice, Fax, SMS, Email, Video)
VoIP	VoIP Block, VoIP Rate, Weight (-10 to 10)
Billing	Billing Block, Rate, First Interval, Increment Interval
Destinations	Region, Country, Destination

The Billing fieldset is what the client is charged: Rate is the price per Billing Block, First Interval is the minimum charged on every answered call and Increment Interval is the step after that. The block lists are in the unit of the service: seconds for Voice, pages for Fax, segments for SMS (values like 1, 6, 30, 60). A typical voice rate is Billing Block 60, Rate 0.02, First Interval 60, Increment Interval 6: the first minute is charged in full, then every 6 seconds. The VoIP fieldset is the cost side (what the trunk charges you) and feeds the profit figures on the dashboard. Weight picks between rates that overlap for the same plan and destination; the lowest Weight wins. Pick Region and Country to narrow the Destination list, then save.

The rate list shows Rate Plan, Service, Destination and Rate, with a filter on Rate Plan, Destination, Service and Rate, and an Export button that writes the filtered rows to CSV.

Importing rates from CSV

Most people load a whole country at once. Click Import, pick the Rate Plan and the Services the file is for, upload the file and look at the Example File link, `rate_sample.csv`. The columns are, in order:

Column	Meaning	Sample
1	destination prefix	1
2	rate name	canada/usa
3	billing block (seconds for voice)	60
4	rate per block	1.50
5	first interval	60
6	increment interval	60

So the sample line `1,canada/usa,60,1.50,60,60` means prefix 1, charged 1.50 per 60-second block, first 60 seconds minimum, then in 60-second steps. No header row; delete the comment lines at the bottom of the sample before you import. You may leave off trailing columns and the importer only fills the ones you gave. The prefix must already exist as a destination, and rows that collide with an existing rate for the same plan are skipped rather than overwritten. The page reports how many rates were imported. An xls file is accepted too, but CSV is the one we test.

Routes

A route says which trunk carries calls to a destination for a given service. Click New Route. Fields: Services, Trunk (only outbound trunks that carry the chosen service are listed), then Destinations: Region, Country, and a Destination list where you select one or more prefixes. Save. The list shows Service, Destination and Trunk; the filter has Region, Country, Service and Trunk, and next to Search there is a Search and Delete button that removes every route matching the filter, which is the quick way to clear a country before re-importing.

Import takes a CSV with one line per destination, prefix then name, as in `route_sample.csv` (`1,canada/usa`); you pick the Services and the Trunk on the import form and every line in the file is routed to that trunk. Export writes the current routes out in the same shape.

How the dialer uses this: it takes the dialed number and finds the longest prefix that has a destination (for 923331234567 it tries 92333123456, 9233312345 and so on, down to 92), looks up the routes for that destination and the campaign's service, keeps only trunks that still have free channels and CPS, and orders them by the trunk's Weight (lowest first) and then by how loaded they are. There is no priority field on the route itself; set Weight on the

trunk under Administration > Gateways. Weight runs from -10 to 10, so a backup trunk gets a higher number than the main one.

Payments

Click New Payment. Fields: Paid By (the client), Comments, Total Paid Amount (positive only), Payment Type (Cash, Cheque, Online Payment, Other), Date paid on. Saving adds the amount to the client's balance; deleting the payment row subtracts it again. The list shows User Name, Amount, Type, Date and Comments, filtered by Client, Company, Amount, Payment Type and Date. Clients see their own list under My Account > Payments.

Where the numbers show up

Reports > CDR shows, per call, the Destinations name, the Provider (trunk), the Rate applied and the Cost. Reports > Overview totals them per campaign as Amount, Net Amount and Total Cost. The dashboard's Daily, Monthly and ALL Profit cards are the client Amount minus the VoIP cost over the same calls. If a call shows a Cost of 0 and the client was not charged, the plan has no rate for that destination; if the call failed with no Provider, there was no route.

Client Management Guide: Multi-Tenant and Reseller Setup

A client is a tenant: it owns its own campaigns, contacts, recordings, agents, DIDs and credit balance, and nothing it does is visible to another client. Resellers run one client per customer. Two things are easy to mix up, so we start there. A client record (Administration > Client Management) holds the balance, plan, channel limit and feature grants. A user record (Administration > User Management) is a login; it is owned by a client and inherits that client's limits. A client without a user cannot log in, and a user without a client has nothing to work with. The pre-configured client on a fresh install is called master; on this node it has 50 channels and the admin login belongs to it.

Add a client

1. Administration > Client Management, click New Client.
2. Client Name: letters, digits, dot, dash and underscore only; it cannot be changed after saving.
3. Rate Plan: the plan whose rates this client will be charged at (see the Billing, Routes and Rate Plans guide). Required when billing is licensed.
4. Max Allowed Channels: the most concurrent calls this client may run across all its campaigns. At least 1. A campaign's Max. Concurrent Channels is capped by this number.
5. Status: Active or Disabled.
6. Personal Contact Info: Email (required), Phone, Street Address, Company, Country.
7. Locale Settings: Timezone offset, Language, Theme. The timezone matters for campaign schedules and the allowed time slot below.
8. Save.

The list shows Name, Balance, Plan, Channels, Phone, Email, Company, Status and Operations. There is a Filter Settings box (Plan, Company) and a Delete Selected button for the ticked rows.

Row operations

Each row has four icons. Hover to read the tooltip.

Edit Client reopens the form above.

Assign / Remove Resources (userresource.php) controls when and what the client may dial:

- Allowed Time Slot to run campaign: Range From and Range To (hour and minute). Campaigns do not dial outside this window. The Applied timezone line tells you which

timezone the range is evaluated in; it is the client's own.

- Allowed Weekdays: checkboxes for each day.
- Permissions: Allow manual dialing, Allow Fax campaign, Allow Survey campaign, Allow Interactive campaign, Allow IVR campaign, Allow Subscription campaign; Allow DID as CallerID, Allow anonymous CallerID, Allow custom CallerID, Allow CallerID list; Can only use dedicated trunk, Can select trunk for campaign. The caller ID boxes decide which Caller ID Type options the client sees in the campaign wizard. The last two together add a Select Trunk field to the client's campaign form; without them the trunk is always chosen through Billing > Routes.

Assign / Remove extensions (userextension.php) shows List of Assigned Extensions and List of Available Extensions (columns Extension, SIP, IAX). Tick rows and click Assign Selected or Remove Selected. An extension is an agent login, so this is how you give a client its agents; the extensions themselves are created under Administration > Agents / Extensions.

Assign / Remove DIDs (useridid.php) works the same way with List of Assigned DIDs and List of Available DIDs (DID, Description). Only shown when the inbound module is licensed. Once a DID is assigned, the client can use it as caller ID (if Allow DID as CallerID is ticked) and point it at an IVR or agent under DID Forwarding.

Give the client a login

1. Administration > User Management, click New User.
2. User Name, then Owned By: pick the client you just created.
3. Status Active, User Role user. (Pick supervisor for a team lead who should only monitor agents.)
4. Password, Retype Password, Email, name and contact fields, Timezone offset, Language, Theme. Save.

The client now logs in on the login page with Login as User and sees the tenant portal: its own campaigns, contacts, reports and My Account, but not Administration. You can create more than one user for the same client; they share the balance and the limits.

Add credit

Contact Center > Billing > Payments, click New Payment. Fields: Paid By (the client), Comments, Total Paid Amount (a positive number), Payment Type (Cash, Cheque, Online Payment, Other), Date paid on. Save adds the amount to the client's Balance. The payment list shows User Name, Amount, Type, Date and Comments, with a filter on Client, Company, Amount, Payment Type and Date. Deleting a payment row takes the same amount back off the balance, which is the only way to reduce credit from the GUI. A client can see its own payments under My Account > Payments.

When the balance runs out a running campaign stops on its own and the campaign list shows Stopped (not enough credit, reserve-credit is: ...). Add a payment and start it again.

Suspending a client

Set Status to Disabled on the client form. From then on none of that client's users can log in: the login check only loads active clients, so they get the wrong-username-or-password style failure even with the right password. Nothing else happens automatically. Campaigns that are already running keep running and keep spending credit until you stop them yourself under Contact Center > Campaigns Management, and the client's agents can still log in to the agent panel with their extension. So to suspend fully: stop the campaigns, set Status to Disabled, and if the agents must go too, remove the extensions under Assign / Remove extensions. Setting a user to Disabled in User Management blocks that one login only.

Reseller notes

- Trunks belong to the system by default. To let clients use one, open Administration > Gateways, click [Assign] on the trunk and set Assigned to to Available to clients (and pick the client) or Available to plans.
- Channels are the lever for selling capacity: Max Allowed Channels per client, Max. Channel Capacity per trunk, Max. Concurrent Channels per campaign. The dialer uses the smallest of the three.
- Margin comes from the difference between the trunk cost and the rate in the client's plan; the dashboard shows it as Daily, Monthly and ALL Profit for the admin.