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714.913.6940

## Creating a voice broadcasting campaign

Dynamic Interactive

<http://vb.dynamicic.com>

Steps to setup an auto dialer campaign:

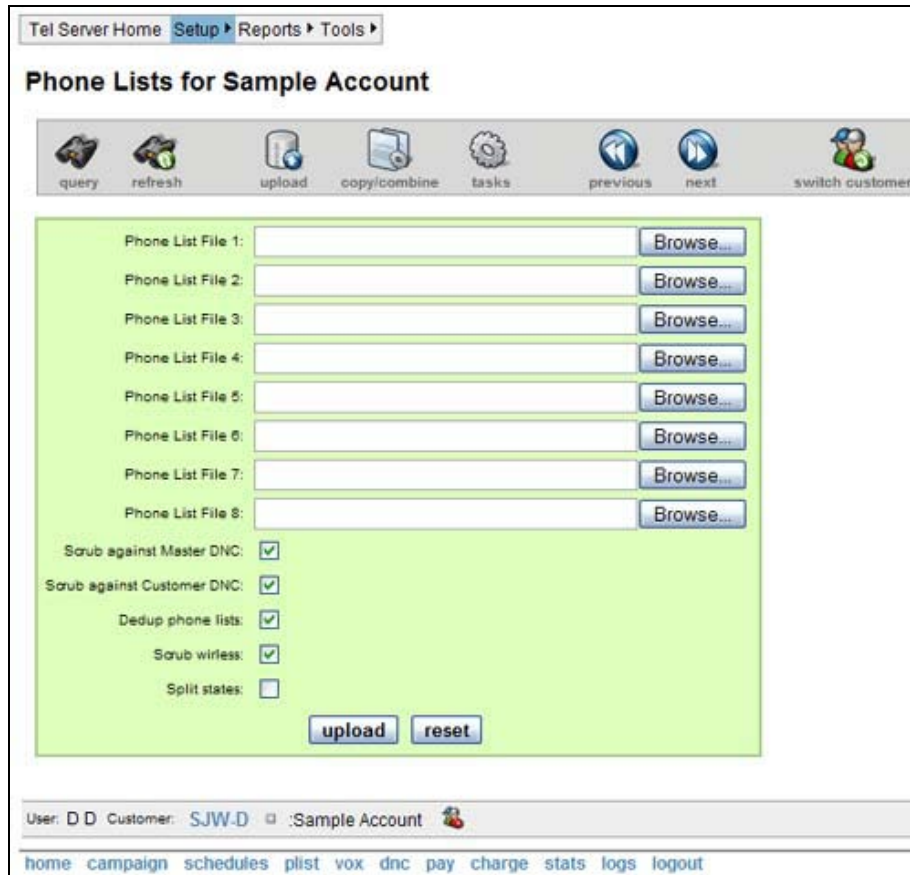
1. Upload the phone lists you wish to use
2. Upload your audio message or call in and record your audio message
3. Setup the campaign
4. Add the schedule for the campaign

Side Notes:

- All times are in military time.
- Voice Files mean audio files or recordings
- Call Dynamic Interactive Support during business hours for assistance 714.913.6971

### Step #1: How to Upload Phone Lists

First step is to save your phone lists in a **txt** file. Notepad works well. Have one phone number per line, in a column with **no** other information (names, addresses, etc.)

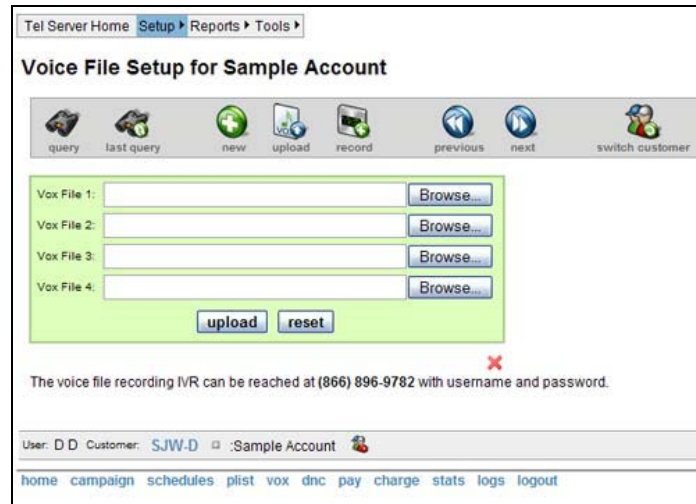


To upload your phone list, scroll over the **SETUP** menu and select **PHONE LIST**. Now select the cylinder like icon that says **UPLOAD** from the grey bar. Browse and select your file(s). You may choose to check or uncheck to scrub your list for the national Do Not Call list, your customer DNC list, Duplicates, and Wireless phone numbers. Once your lists are ready for upload select **UPLOAD** at the bottom. The program will read every number in your list, but will sort any numbers you have selected it not to read (DNC, Duplicates, and Wireless).

Once uploaded your phone list is ready to be attached to a campaign. (see step #4)

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**Step #2: Upload your audio message or call in and record your audio message**



Tel Server Home Setup Reports Tools

### Voice File Setup for Sample Account

query last query new upload record previous next switch customer

Vox File 1:  Browse...

Vox File 2:  Browse...

Vox File 3:  Browse...

Vox File 4:  Browse...

upload reset

The voice file recording IVR can be reached at (866) 896-9782 with username and password.

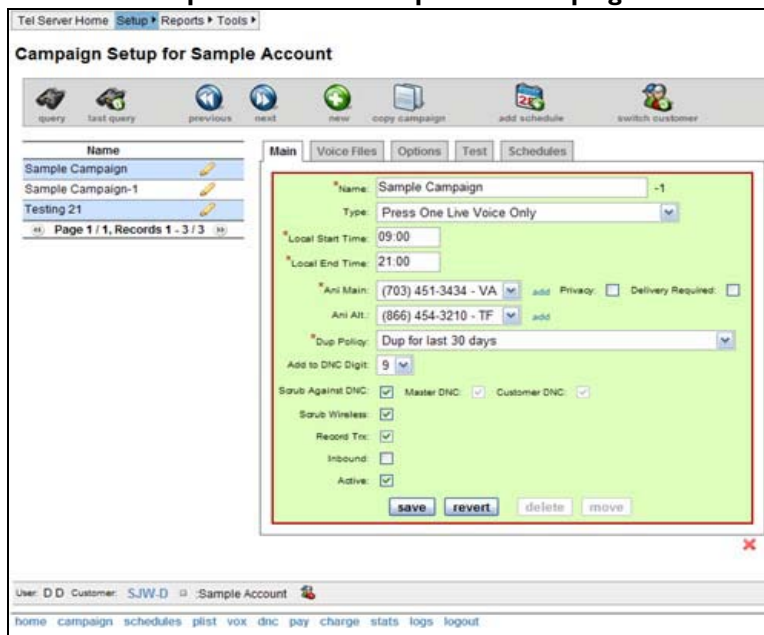
User: D D Customer: SJW-D :Sample Account

home campaign schedules plist vox dnc pay charge stats logs logout

To record your message, scroll over the **SETUP** menu then click on **VOICEFILE**. There are 2 ways to upload a voice file. First, if you already have a voice file recorded and just need to upload, select **UPLOAD** from the grey tool bar and save your file. File must be in MP3 format. Second, if you still need to record your voice file select **RECORD** from the grey tool bar. This option will give you a phone number and a pin number. When you call in you **MUST** keep this web page open and **DO NOT** refresh because this page generates new pin numbers every few seconds and when you record your message, once you select to save it over the phone, a prompt question will appear and you must save the file on this web page. \*Note: If you are setting up a campaign message for press one's only make sure to say "press 1 to connect or press 9 to be removed from the list"

Once your file is already uploaded and saved you will need to create a new campaign

### Step #3: How to set up a new campaign



Tel Server Home Setup Reports Tools

### Campaign Setup for Sample Account

query last query previous next new copy campaign add schedule switch customer

Name
Sample Campaign
Sample Campaign-1
Testing 21

Page 1 / 1, Records 1 - 3 / 3

Main Voice Files Options Test Schedules

\*Name: Sample Campaign -1

Type: Press One Live Voice Only

\*Local Start Time: 09:00

\*Local End Time: 21:00

\*ANI Main: (703) 451-3434 - VA add Privacy:  Delivery Required:

ANI Alt: (866) 454-3210 - TF add

\*Dup Policy: Dup for last 30 days

Add to DNC Digit: 9

Scrub Against DNC:  Master DNC:  Customer DNC:

Scrub Wireless:

Record Trx:

Inbound:

Active:

save revert delete move

User: D D Customer: SJW-D :Sample Account

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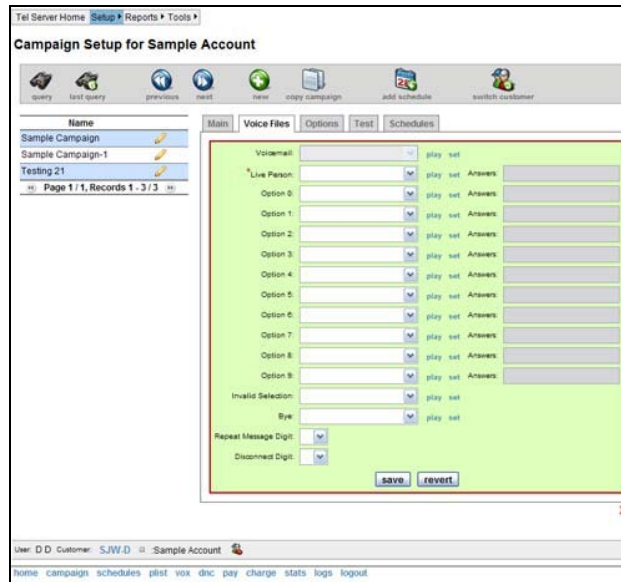
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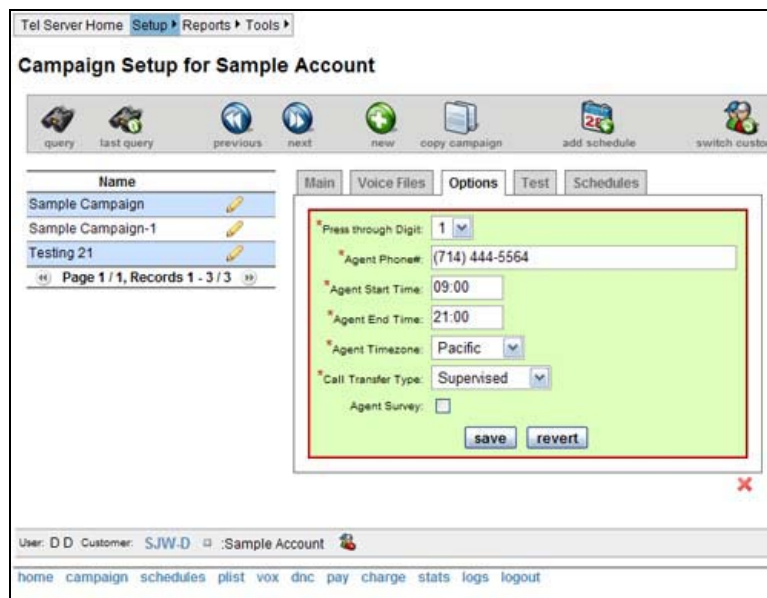
Now that your voice file and phone list are uploaded, use the very top grey menu bar and scroll over **SETUP** and click on **CAMPAIGN**. In the grey tool bar select the green **NEW** button to start a new campaign. Here, you will:

- **NAME** your campaign.
- **TYPE:**
  - Press one live voice only* – Plays a live message and gives a transfer option. No voicemails are left.
  - Press one live voice & Answering machine* - Plays a live message and gives a transfer option. Voicemail is left.
  - Message for live voice* – Plays a live message when someone answers but there is no transfer option. No voicemail is left.
  - Message for voice mail* – Only leaves voicemails.
  - Message for answering machine and live voice* - Plays a live message when someone answers but there is no transfer option. Voice mail is left.
  - Quick Survey* – Conducts a multiple choice question survey.
- **LOCAL START TIME AND LOCAL END TIME:** - These will always remain at 08:00 and 21:00. These are just the earliest and latest the campaign is allowed to run. Not when the campaign will be running.
- **ANI MAIN AND ANI ALT** – This is the number that you or the IT dept. has selected as the caller ID. Most of the time this will be a number that the IT dept. comes up with if you choose not to provide your own phone number on the caller ID. These numbers are set ahead of time on the Setup Menu → Customers & Users Page → New ANI.
- **DUP POLICY** – You can choose to scrub for numbers you have already called in the last 24 hours, 10 days, 30 days or no check at all which is No Dup Check.
- **ADD TO DNC DIGIT** – What ever number you recorded in the message to press to be added to the DNC, select that number. This is most likely 9.
- **SCRUB AGAINST DNC, MASTER DNC (federal DNC), CUSTOMER DNC (your own DNC), SCRUB WIRELESS, AND RECORD TRX (record your press 1 calls)** – check or uncheck the selections that apply.

Next select the second tab near top of the green box that reads **VOICE FILE**. Depending on what TYPE of campaign you selected you will have an asterisk next to inserts that apply. Example, if you chose Live and Answering Machine messages, an asterisk will appear next to Live Person and Voicemail. From the drop down menu select the file that applies to each message. You can press play to hear the message that will play for that selection before you save your work.



Once your voice files have been selected, click on the 3<sup>rd</sup> tab labeled “Options” . Set your “**press through digit**” which is the telephone keypad number that triggers the call to be transferred to a live rep. Then set your “**agent phone**” number which is the number that the calls will be routed to (no toll free numbers). Set the agent start and end time to 8:00 and 21:00 also (these are just the earliest and latest the campaign can trigger calls). Next set the “**agent time zone**” which is the time zone that the calls are being routed to. And lastly set “**call transfer type**” to Supervised.



Now that you have completed the 3<sup>rd</sup> tab (options) you need to click save at the bottom of the green box to save the campaign you just created.

Next hit the calendar icon “**Add Schedule**” on the grey bar area above the green box.

### Step #4: Adding the Campaign Schedule

Clicking **Add Schedule** will bring you to the schedule entry page.

Tel Server Home **Setup** Reports Tools

#### Schedule Entry

lookup
refresh
previous
1/1
next
attach phone list
single
upload
copy
stats

#### Schedule

Schedule Id: 670512  
 Customer: Sample Account  
 Campaign: Dynamic Interactive Press 1 & VM  
 Date: 02/06/2009

Start Time (Pacific, 24h): 09:00 PST  
 End Time (Pacific, 24h): 21:00 PST

Priority: 5 normal

Dial Rate Type: Max Channels per Agent

Dial Rate Amount: 25

Agents: 1

Phone# Entries: 100,000

Redial: redial once

Redial Delay: 30 minutes

Redial Filter:  Busy  No Answer  Problems  
 Answering Machine

Repeat:   
 Monday  Tuesday  Wednesday  
 Thursday  Friday  Saturday  Sunday  
 Recalculate Phone# Entries

Active:

Description:

#### Attached Phone Lists

Id	Name	Time Zone	Type	Entries Left
959813	dynamic interactive phone list 1.bt	MDT	Ready	1
959812	dynamic interactive phone list 1.bt	PDT	Ready	5
				6

#### Dialer View

Dialer: stopped

Channels:

Connected:

Routed:

Est. End Time:

Information:

Warning:

Error:

Throttle:

home campaign schedules plist vox dnc pay charge stats logs logout Site: NS, Version: 1.0.18 (d1.2.053)

First set the start and stop time as the earliest and latest you would ever run the campaign. We do not recommend you setup your campaign to automatically run within these times. Instead the best way is to manually click start and stop to control your campaign. This prevents the campaign from starting automatically when you did not intend it to.

Setting the dial rate type depends on your campaign and your setup. This is how the types work:

- **Max Channels Per Agent** – Is the most commonly used setting. It uses the specified amount of lines (Dial Rate Amount) that you set for each available agent. If you set 100 as your “Dial rate amount” and set 3 agents it will dial on 300 lines. When one agent is busy it will reduce to 200.
- **Max channels** – Runs a certain amount of lines without changing based on available agents.
- **Finish on time** – Will run fast enough to complete the number of “Phone# Entries” before the end time hits.
- **Call Per Hour** – Will run the specified number of calls per hour. Dial rate amount specifies this number.
- **Lives per hour** – Will attempt to hit the specified number of live answered calls per hour. Dial rate amount specifies this number.

The **“Dial Rate Amount”** corresponds to your selection above in the Dial rate type. It indicates either the number of phone lines (channels) or calls per hour.

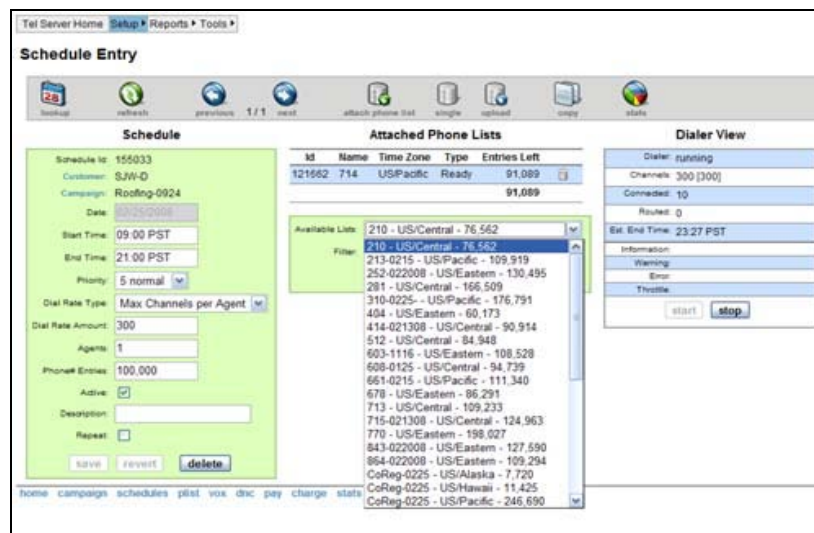
**“Agents”** is how many reps you have available to take calls. Once the number of active press 1 calls equals the number of agents the dialer will stop calling. If you don’t want the dialer to stop dialing set the number of agents to zero.

**“Phone# Entries”** is the maximum number of dials the campaign can dial today.

UNCHECK the **ACTIVE** option!! This is very important because if you don’t uncheck it your campaign will start right away.

Check the **“repeat”** option and select the days you wish for the campaign to be available to run.

Next, and before you save your settings you need to attach your phone list for this campaign.



From the grey tool bar select **ATTACH PHONE LIST**. From the drop down menu select your phone list file and click **ADD**. If you have phone numbers in different time zones you will see multiple lists of your same phone list. Make sure you have selected all the lists that apply.

MAKE SURE TO SAVE YOUR WORK by clicking save in the green box to the left!