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## **Guide to Callouts Configuration**

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# 1 About This Document

## 1.1 Intended Audience


This document is intended for installers and administrators of a Cheetah PBX. It is a user's guide document designed to provide you with information on how to program the system for the purposes of placing automated outbound calls. These calls can be to notify someone of a meeting, remind them of an appointment, ask them to take a survey, or any other reason. It is assumed you have a basic knowledge of Zeus functionality and have already read the Script Writers Guide as well as understand basic telephony circuit switching principles.


Prior to reading and using this document it is strongly suggested you become familiar with the Auto Attendant Guides.

## 1.2 Conventions Used In This Document

This manual uses several conventions to help you learn to use the program quickly and easily.

Menus and dialog options that have an underlined letter in their name represent the shortcut key assigned to the menu or option. Pressing the shortcut keys assigned to the menu or option is equivalent to clicking the menu or option. For example, the following figure shows a sample menu that uses shortcut keys. Procedures in this manual reflect shortcut keys if they are available.

The Caution and Warning symbol, , indicates information or a step that could be potentially dangerous, such as a step that could permanently affect the database or a user's access to the program.

The light bulb, , indicates a tip or information that will help you in using this document.

## 1.3 Disclaimer

This document is provided to you for informational purposes only and is believed to be accurate as of the date of its publication, and is subject to change without notice. Telegato LLC assumes no responsibility for any errors or omissions in this document and shall have no obligation to you as a result of having made this document available to you or based upon the information it contains.

## 1.4 Logging In

To log in to the System Management Console refer to the Logging In Guide.

## 1.5 Terms

Within this document the term *port* refers to a 64 Kb DS0 or analog circuit switched connection to a switch (PBX, CO, etc.) or telephone. For a digital connection, a *port* is designated by the physical board, trunk, and timeslot. For an analog connection, a *port* is designated by the physical board and trunk.

The term *Line* refers to a logical designation (number) given to a *port*. No two lines may have the same *Line* ID (number) and *Lines* start from zero (0). *Line* numbers are not required to start at zero (0) and need not be contiguous.

The term *callout* means a phone call placed to a telephone number to announce something, remind someone of something, inform someone of a new voicemail, or to offer a survey.

The term *callout log* means a record of the what happened when a *callout* call was placed. Examples of this might be the that call was not answered or busy. Every *callout* results in a *callout* log record being created unless the *callout* requirements are satisfied.

The term *callout history* refers to a single record created for each *callout* request and identifies the final results of all *callout* attempts.

## 2 The Makeup of a Callout

This section explains what a callout is and what the underlying data is that supports making callouts.

A callout request is driven from a single database record containing attributes about the callout request.

Callouts generally fall into one of the following categories but can be for any purpose:

- A call made to make an announcement.
- A call made as a reminder of an appointment that requires acknowledgment.
- Calls made to a list of people to make an announcement.
- Calls made to a list of people made that requires acknowledgement.
- A callout made to notify someone of a new voicemail message.
- Calls made to offer people a telephone based survey.

It is important to identify the type of callout being made to determine the proper setup. The system determines the basic mode of operation of each callout by the value of a single field in the callout record called *calloutProfileID*. A callout profile consists of the following pieces of information:

Name	Description
Calls Schedule	Identifies the days of the week calls can be made, the start and end times for each day calls can be made, and the minimum amount time to wait before retrying call that was not answered, busy or possibly unacknowledged
Callout Media	List of audio information to play to the called party once the call has been answered. This include up to six pieces of information unique to the call such as an appointment date and/or time, a name, etc
Delivery Options	Maximum number of calls that can be made to a single destination before abandoning the callout, whether a message is allowed to be left on an answering machine, whether confirmation of that call is required to satisfy the callout, and up to three times that are presented as a menu to the called party
Priority	Priority of this call

If the callout is a simple announcement that does not require acknowledgement, then only one more piece of information is required, the telephone number to call we refer to as the *destination*. The *destination* is the dialed telephone number.

## 2.1 Optional Callout Directives

The following pieces of information in a callout are optional and reside directly in the callout record:

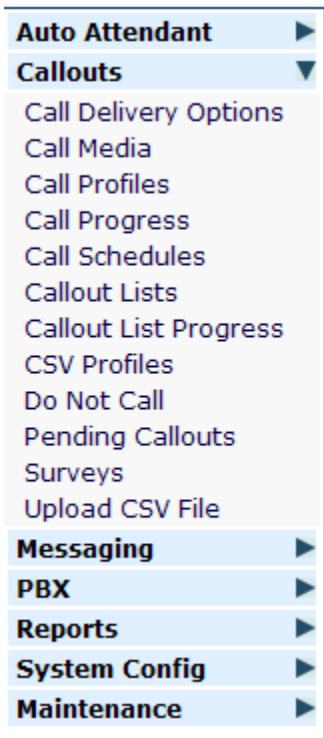
Name	Description
jobID	A number not used by the system and exists to allow customers track callout activity. This field is passed from the callout request into the callout log and history
jobType	A 15 character text field not used by the system and exists to allow customers track callout activity. This field is passed from the callout request into the callout log and history
sourceID	A number not used by the system and exists to allow customers track callout activity. This field is passed from the callout request into the callout log and history
voiceMailID	A voicemail account ID is present in this field then the called party will be presented with the option to go into voicemail administration where they can listen to their messages and optionally delete or save messages
stopJobOnConfirm	Whether calls should be stopped once the called party has acknowledged the call
startDate	First date that calls are allowed to be made for this callout
endDate	Last date that calls are allowed to be made for this callout
firstTimeToCall	First time of day that calls are allowed to be made for this callout. If a value exists here it supersedes the time specified in the call schedule
lastTimeToCall	Last time of day that calls are allowed to be made for this callout. If a value exists here it supersedes the time specified in the call schedule
calloutListRecordID	ID of a callout list which specifies a list of telephone number to be called which all use the same callout schedule, media and delivery options
DataValue1	Text string that can be used in the callout media
DataValue2	Text string that can be used in the callout media
DataValue3	Text string that can be used in the callout media
DataValue4	Text string that can be used in the callout media
DataValue1	Text string that can be used in the callout media
DataValue1	Text string that can be used in the callout media

### 3 Provisioning Callouts

Before placing any callout requests the callout schedule, media, delivery options, and call profile must be defined using the system web pages. The URL for the system web pages is its network name followed by “zeus/default.php”. Here’s an example: <http://myivr/zeus/default.php>. This will display the login page. The default login for administrators is ‘ts-admin’ with a password of ‘ts-admin’.

### 4 Configuring Callouts

To begin configuring Callouts, log into the System Management Console and click on the Callouts tab featured in the left hand menu, this will reveal the Callouts sub menu. The following is an image of the expanded menu:



#### 4.1 Call Delivery Options

To add, change, or delete call delivery options click on the Call Delivery Options item in the Callouts submenu. The following image shows a sample grid for Call Delivery Options:

CallOut Delivery Options				
Name	Max Calls	Confirmation Required	Leave On Machine	Description
Delinquent Account	Infinite		✓	

### 4.1.1 Adding Call Delivery Options

To add call delivery options, click on the Add button. The following is a sample image of the Call Delivery Options dialogue box:

**CallOut Delivery Options - Add Record** ✕

Name

Work Group Name

Max Calls

Confirmation Required

Leave On Machine

Description

The following is an explanation of fields in this dialogue:

Field	Description
Name	Name of this delivery option
Work Group Name	Name of work group to use these delivery options
Max Calls	Maximum number of calls to make
Confirmation Re-quired	Check this box when you want to require confirmation

Field	Description
Leave On Machine	Check this box if you want to leave on a machine
Description	Description of this delivery option

After all values have been entered and selected click the Submit button.

#### 4.1.1.1 Selecting Work Group Name

To select desired work group name first click on the menu's down arrow which will display name options. Select work group. The following is a sample image of the name options:

The screenshot shows a dialog box titled "CallOut Delivery Options - Add Record". It contains several input fields: "Name" (text box), "Work Group Name" (dropdown menu with "main" selected and a list of options "main" and "main2" visible), "Max Calls" (dropdown menu), "Confirmation Required" (checkbox), "Leave On Machine" (checkbox), and "Description" (text box). At the bottom right, there are "Submit" and "Cancel" buttons.

#### 4.1.1.2 Selecting Max Calls

To select desired number of max calls first click on the menu's down arrow which will display max call options. Select your desired number. The following is a sample image of the max calls options:

The screenshot shows the same dialog box as above, but the "Max Calls" dropdown menu is open, displaying a list of numbers from 1 to 19 and the word "Infinite". The "Work Group Name" dropdown is now closed and shows "main". The "Confirmation Required" and "Leave On Machine" checkboxes are visible. The "Description" text box is also present. "Submit" and "Cancel" buttons are at the bottom right.

### 4.1.2 Changing Call Delivery Options

To change call delivery options first select a row to change then click the Change button. The following is a sample image of the Call Delivery Options dialogue box:

**CallOut Delivery Options - Edit Record**

Name:

Work Group Name:

Max Calls:

Confirmation Required:

Leave On Machine:

Description:

**Option Items**

Item	Valid	Prompt	Action	Parameter
1				
2				
3				

15 Page 1 of 1 Displaying 1 to 1 of 1 items

You will only be able to change the values for the row you selected. After changing desired data click the Submit button.

### 4.1.3 Deleting Account Codes

To delete call delivery option first select the row(s) to delete then click the Delete button.

## 4.2 Call Media

To add, change, or delete call media click on the Call Media item in the Callouts submenu. The following image shows a sample grid for Call Media:

## Guide To Callouts Configuration

**CallOut Media**

Buttons: Add, Change, Delete, Select All, Unselect All, Help

Name	Work Group	Description
Delinquent Account	main	

Page 1 of 1 | Displaying 1 to 1 of 1 items

### 4.2.1 Adding Call Media

To add call media, click on the Add button. The following is a sample image of the Call Media dialogue box:

**CallOut Media - Add Record**

Name

Work Group Name **main**

Description

Item 1 Valid

Item 1 Name

Item 2 Valid

Item 2 Name

Item 3 Valid

Item 3 Name

Item 4 Valid

Item 4 Name

Item 5 Valid

Item 5 Name

Item 6 Valid

Item 6 Name

**Submit** **Cancel**

The following is an explanation of fields in this dialogue:

## Guide To Callouts Configuration

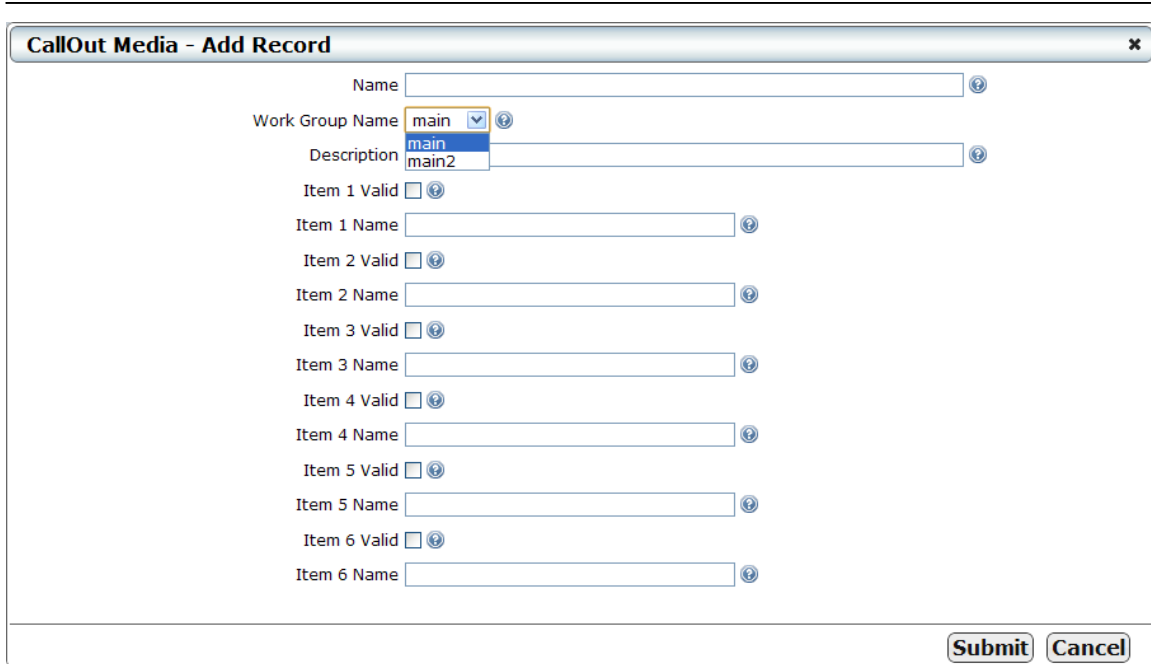
Field	Description
Name	Name of media definition
Work Group Name	Name of work group to use this call media
Description	Description for this entry
Item 1 Valid	Check this box if Item 1 is valid
Item 1 Name	Name of Item 1
Item 2 Valid	Check this box if Item 2 is valid
Item 2 Name	Name of Item 2
Item 3 Valid	Check this box if Item 3 is valid
Item 3 Name	Name of Item 3
Item 4 Valid	Check this box if Item 4 is valid
Item 4 Name	Name of Item 4
Item 5 Valid	Check this box if Item 5 is valid
Item 5 Name	Name of Item 5
Item 6 Valid	Check this box if Item 6 is valid
Item 6 Name	Name of Item 6

After all values have been entered and selected click the Submit button.

### 4.2.1.1 Selecting Work Group Name

To select desired work group name first click on the menu's down arrow which will display name options. Select work group. The following is a sample image of the name options:

## Guide To Callouts Configuration



**CallOut Media - Add Record**

Name

Work Group Name

Description

Item 1 Valid

Item 1 Name

Item 2 Valid

Item 2 Name

Item 3 Valid

Item 3 Name

Item 4 Valid

Item 4 Name

Item 5 Valid

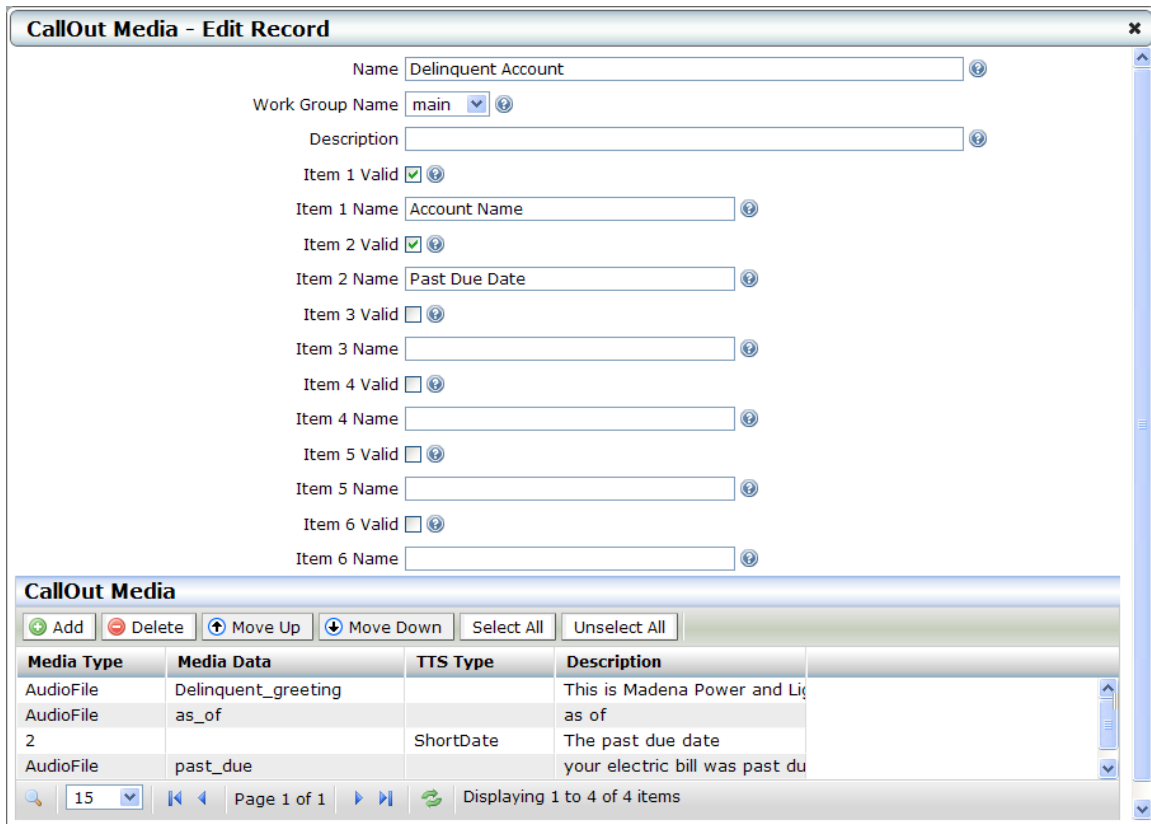
Item 5 Name

Item 6 Valid

Item 6 Name

### 4.2.2 Changing Call Media

To change call media settings first select a row to change then click the Change button. The following is a sample image of the Call Media dialogue box:



**CallOut Media - Edit Record**

Name

Work Group Name

Description

Item 1 Valid

Item 1 Name

Item 2 Valid

Item 2 Name

Item 3 Valid

Item 3 Name

Item 4 Valid

Item 4 Name

Item 5 Valid

Item 5 Name

Item 6 Valid

Item 6 Name

**CallOut Media**

Media Type	Media Data	TTS Type	Description
AudioFile	Delinquent_greeting		This is Madena Power and Lig
AudioFile	as_of		as of
2		ShortDate	The past due date
AudioFile	past_due		your electric bill was past du

15 Page 1 of 1 Displaying 1 to 4 of 4 items

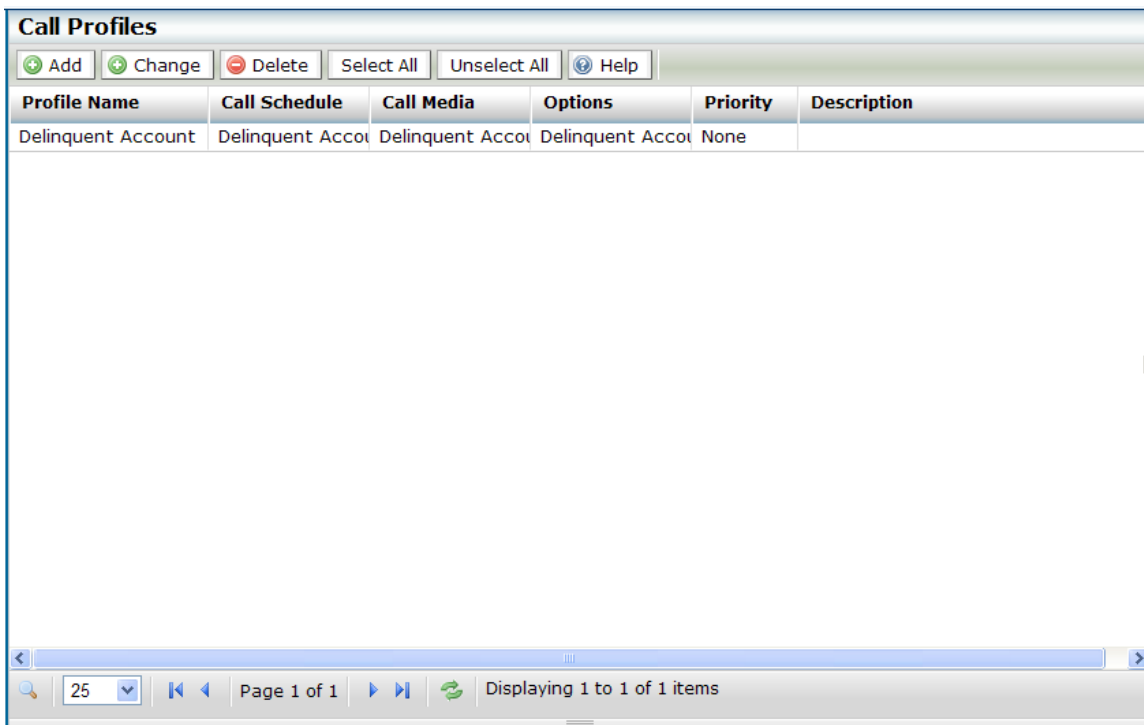
You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 4.2.3 Deleting Call Media

To delete call media settings first select the row(s) to delete then click the Delete button.

## 4.3 Call Profiles

To add, change, or delete call profiles click on the Call Profiles item in the Callouts submenu. The following image shows a sample grid for Call Profiles:



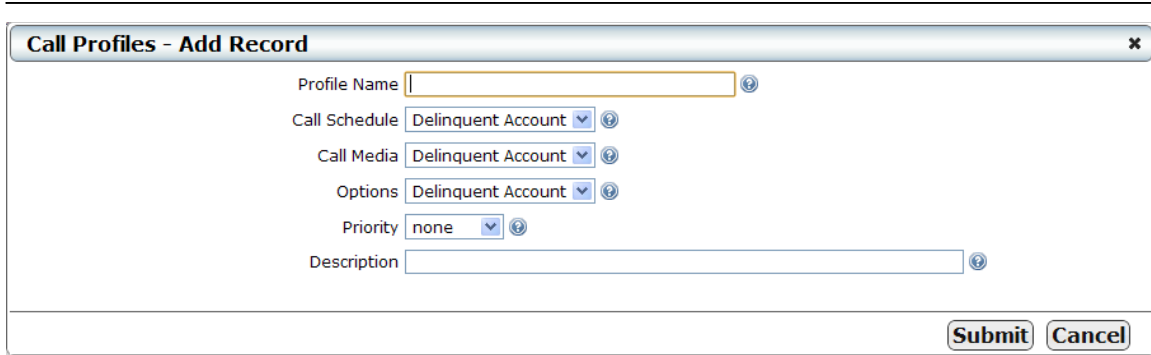
The screenshot shows a web application interface for managing Call Profiles. At the top, there is a title bar "Call Profiles" and a toolbar with buttons for "Add", "Change", "Delete", "Select All", "Unselect All", and "Help". Below the toolbar is a table with the following columns: Profile Name, Call Schedule, Call Media, Options, Priority, and Description. The table contains one row with the following data: Profile Name: Delinquent Account, Call Schedule: Delinquent Accou, Call Media: Delinquent Accou, Options: Delinquent Accou, Priority: None, and Description: (empty). At the bottom of the table, there is a pagination bar showing "Page 1 of 1" and "Displaying 1 to 1 of 1 items".

Profile Name	Call Schedule	Call Media	Options	Priority	Description
Delinquent Account	Delinquent Accou	Delinquent Accou	Delinquent Accou	None	

### 4.3.1 Adding Call Profiles

To add call profiles, click on the Add button. The following is a sample image of the Call Profiles dialogue box:

## Guide To Callouts Configuration



**Call Profiles - Add Record**

Profile Name

Call Schedule

Call Media

Options

Priority

Description

**Submit** **Cancel**

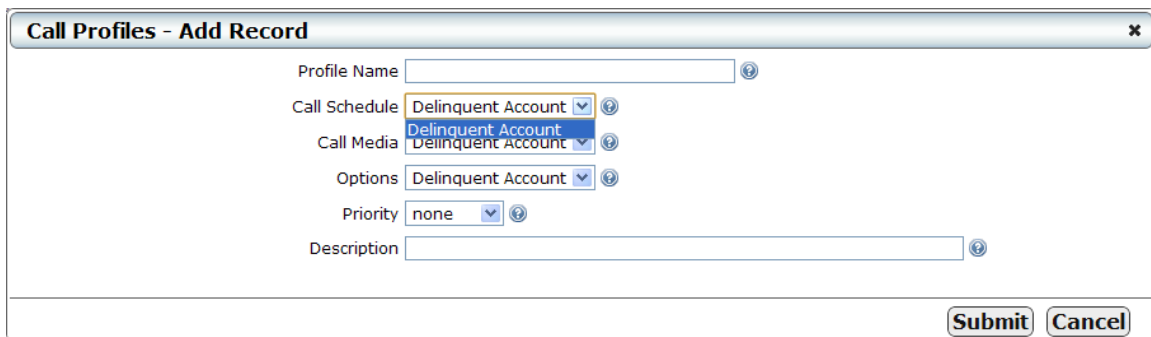
The following is an explanation of fields in this dialogue:

Field	Description
Profile Name	Name of call profile
Call Schedule	Call Schedule to be used for this call profile
Call Media	Call Media to be used for this call profile
Options	Delivery options to be used for this call profile
Priority	Call priority for calls using this profile
Description	Description of call profile

After all values have been entered and selected click the Submit button.

### 4.3.1.1 Selecting Call Schedule

To select call schedule first click on the menu's down arrow which will display schedule options. Select desired call schedule. The following is a sample image of the schedule options:



**Call Profiles - Add Record**

Profile Name

Call Schedule

Call Media

Options

Priority

Description

**Submit** **Cancel**

### 4.3.1.2 Selecting Call Media

To select call media first click on the menu's down arrow which will display media options. Select desired call media. The following is a sample image of the media options:

**Call Profiles - Add Record**

Profile Name

Call Schedule

Call Media

Options

Priority

Description

### 4.3.1.3 Selecting Delivery Options

To select call delivery options first click on the menu's down arrow which will display delivery options. Select desired option. The following is a sample image of the delivery options:

**Call Profiles - Add Record**

Profile Name

Call Schedule

Call Media

Options

Priority

Description

### 4.3.1.4 Selecting Priority

To select priority first click on the menu's down arrow which will display priority options. Select desired option. The following is a sample image of the priority options:

**Call Profiles - Add Record**

Profile Name

Call Schedule

Call Media

Options

Priority

Description

## 4.3.2 Changing Call Profiles

To change call profiles, first select a row to change then click the Change button. The following is a sample image of the Call Profiles dialogue box:

**Call Profiles - Edit Record**

Profile Name: Delinquent Account

Call Schedule: Delinquent Account

Call Media: Delinquent Account

Options: Delinquent Account

Priority: none

Description:

Submit Cancel

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 4.3.3 Deleting Call Profiles

To delete a call profile first select the row(s) to delete then click the Delete button.

## 4.4 Call Progress

To view and edit call progress settings click on the Call Progress item in the Callouts submenu. The following shows a sample image for the Call Progress dialogue box:

**Call Progress - Edit Record**

First Event ms: 5000

Remaining Event ms: 15000

Silence Duration ms: 500

Machine Talk Duration ms: 1200

Voice Talk Duration ms: 200

First Packet Time ms: 5000

Remaining Packet Time ms: 1000

Dsp Threshold: 100

ToneVoiceEnergy: 1500

Record Progress:

Help Submit Cancel

The following is an explanation of fields in this dialogue:

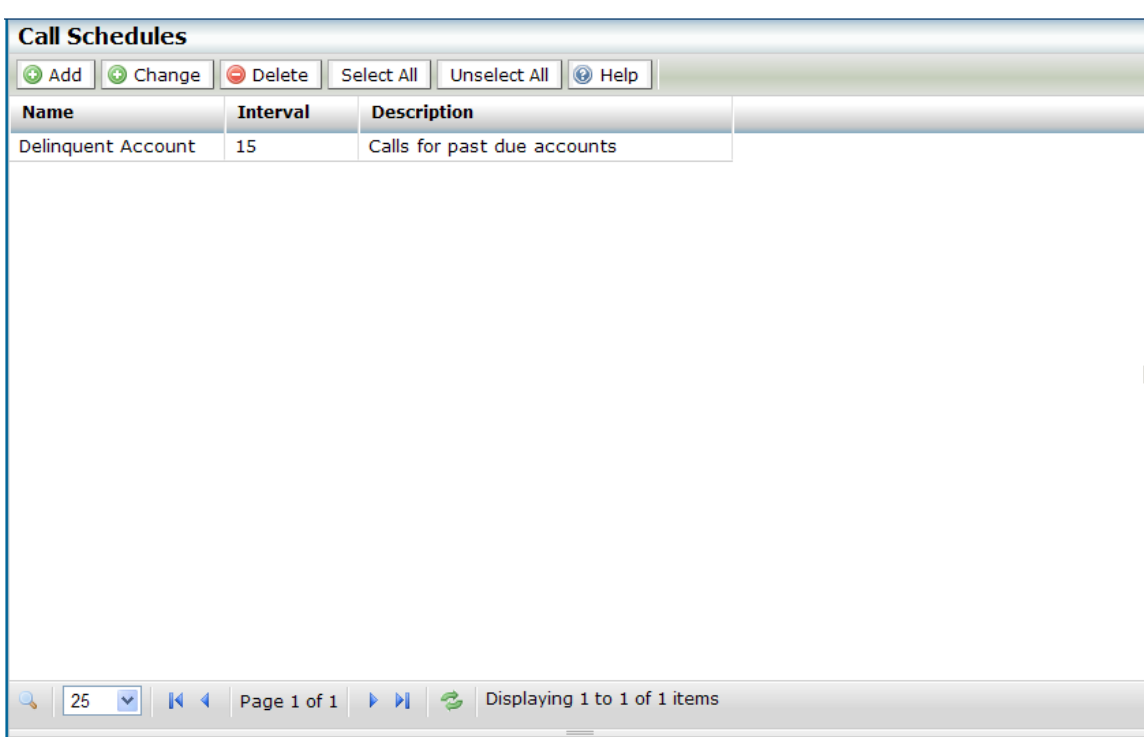
Field	Description
First Event ms	Amount of time in ms for the first event detection. Events occur when a dsp state change occurs. For example a transition from dial tone to ringing state would trigger an event. The default is 5000 ms. If your PBX is not an appliance this value is not used.
Remaining Event ms	Amount of time in ms for any remaining event detections. The default is 15000 ms. If your PBX is not an appliance this value is not

Field	Description
	used.
Silence Duration ms	After this amount of time in ms has elapsed a check is made for machine or voice answer. The default is 500 ms. If your PBX is not an appliance this value is not used.
Machine Talk Duration ms	If this duration in ms is exceeded than an indication of "machine" is returned to the application. The default is 1000 ms. If your PBX is not an appliance this value is not used.
Voice Talk Duration ms	If this duration in ms is exceeded than an indication of "answer" (voice) is returned to the application. The default is 200 ms. If your PBX is not an appliance this value is not used.
First Packet Time ms	Amount of time to wait in ms for a first received packet. The default is 5000 ms. If your PBX is not an appliance this value is not used.
Remaining Packet Time ms	Amount of time in ms to wait for any remaining packets. The default is 100 ms. If your PBX is not an appliance this value is not used.
Dsp Threshold	Used to detect DSP silence. This is compared to the average PCM value for a packet to determine silence. The default is 100. If your PBX is not an appliance this value is not used.
Tone Voice Energy	Used to detect voice energy vs. silence. Check is done after various tone checks (dial tone, ringing, etc.) have been made. Value is in Goertzel energy values. The default is 10000000. If your PBX is not an appliance this value is not used.
Record Progress	This is a flag to enable/disable recording call progress to a file for debugging. If your PBX is not an appliance this value is not used.

After inputting/changing desired data click the Submit button.

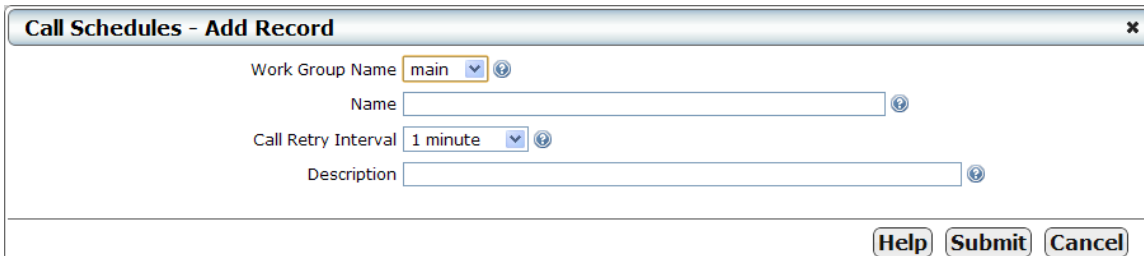
## 4.5 Call Schedules

To add, change, or delete call schedules click on the Call Schedules item in the Callouts submenu. The following image shows a sample grid for Call Schedules:



### 4.5.1 Adding Call Schedules

To add a call schedule, click on the Add button. The following is a sample image of the Call Schedules dialogue box:



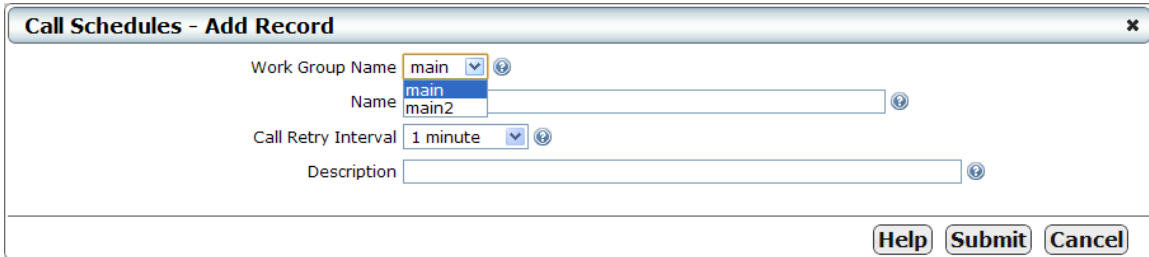
The following is an explanation of fields in this dialogue:

Field	Description
Work Group Name	Name of work group to use this call schedule
Name	Name of this call schedule
Call Retry Interval	Interval in seconds when placing calls using this schedule
Description	Description of call schedule

After all values have been entered and selected click the Submit button.

### 4.5.1.1 Selecting Work Group Name

To select desired work group first click on the menu's down arrow which will display group options. Select your desired work group. The following is a sample image of the group options:



Call Schedules - Add Record

Work Group Name: main

Name: main2

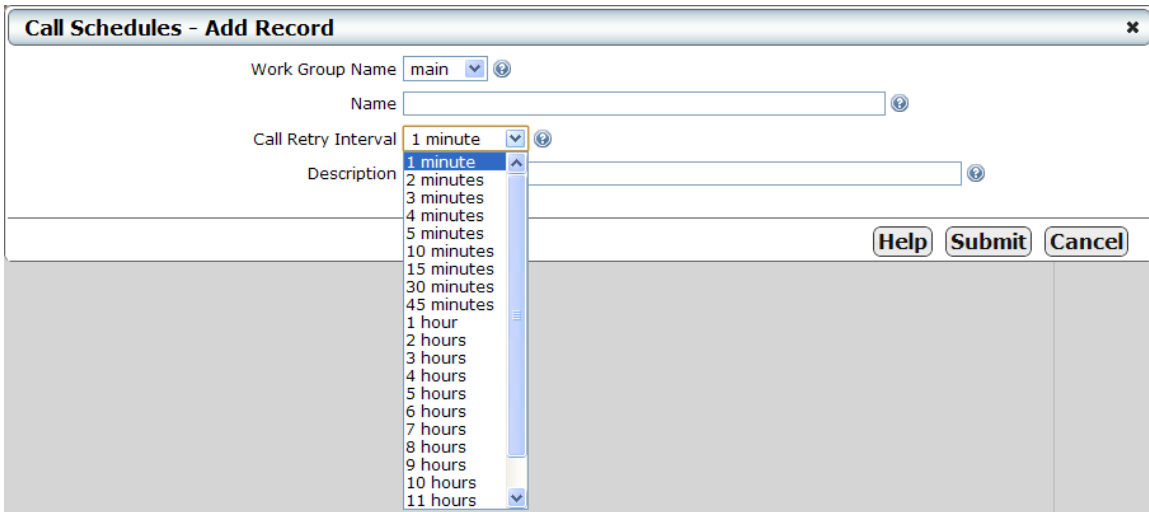
Call Retry Interval: 1 minute

Description:

Help Submit Cancel

### 4.5.1.2 Selecting Call Retry Interval

To select desired time interval first click on the menu's down arrow which will display interval options. Select desired retry time. The following is a sample image of the interval options:



Call Schedules - Add Record

Work Group Name: main

Name:

Call Retry Interval: 1 minute

Description:

- 1 minute
- 2 minutes
- 3 minutes
- 4 minutes
- 5 minutes
- 10 minutes
- 15 minutes
- 30 minutes
- 45 minutes
- 1 hour
- 2 hours
- 3 hours
- 4 hours
- 5 hours
- 6 hours
- 7 hours
- 8 hours
- 9 hours
- 10 hours
- 11 hours

Help Submit Cancel

## 4.5.2 Changing Call Schedules

To change a call schedule, first select a row to change then click the Change button. The following is a sample image of the Call Schedules dialogue box:

## Guide To Callouts Configuration

**Call Schedules - Edit Record**

Work Group Name main

Name Delinquent Account

Call Retry Interval 15 minutes

Description Calls for past due accounts

---

**Schedule Items**

Change

Day	Valid	Start Time	End Time
Sunday	✓	09:00:00	21:00:00
Monday	✓	09:00:00	21:00:00
Tuesday	✓	09:00:00	21:00:00
Wednesday	✓	09:00:00	21:00:00
Thursday	✓	09:00:00	21:00:00
Friday	✓	09:00:00	21:00:00
Saturday	✓	09:00:00	21:00:00

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Help
Submit
Cancel

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 4.5.2.1 Changing Schedule Items

To change a schedule item, first select a row to change then click the Change button. The following is a sample image of the Call Schedules dialogue box:

**Change Monday Schedule**

Valid

Start Time 9:00 AM

End Time 9:00 PM

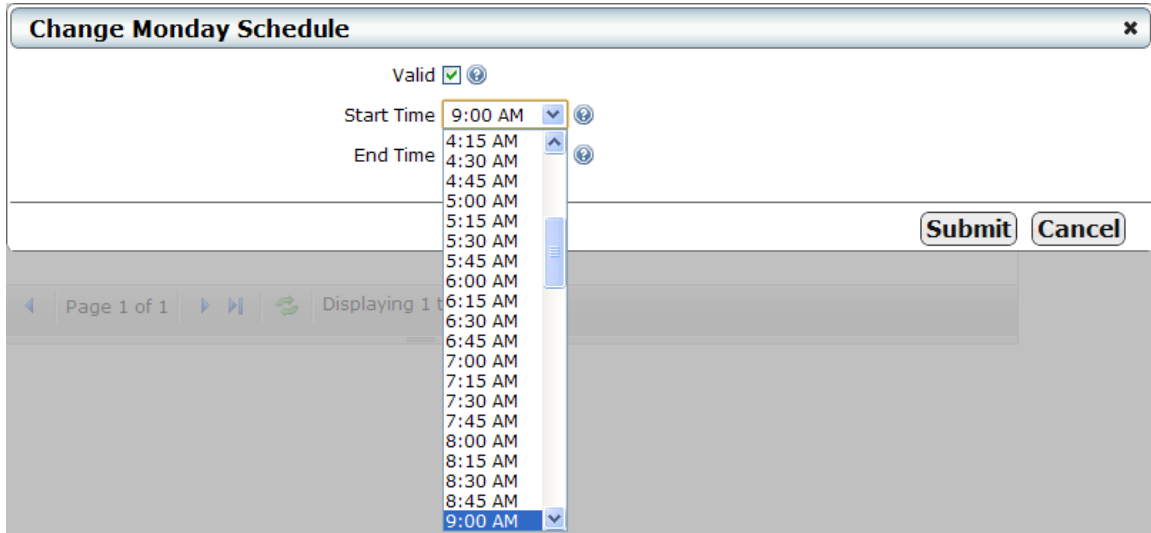
Submit
Cancel

The following is an explanation of fields in this dialogue:

Field	Description
Valid	Check this box if this day is valid
Start Time	Start Time to call
End Time	End Time to call

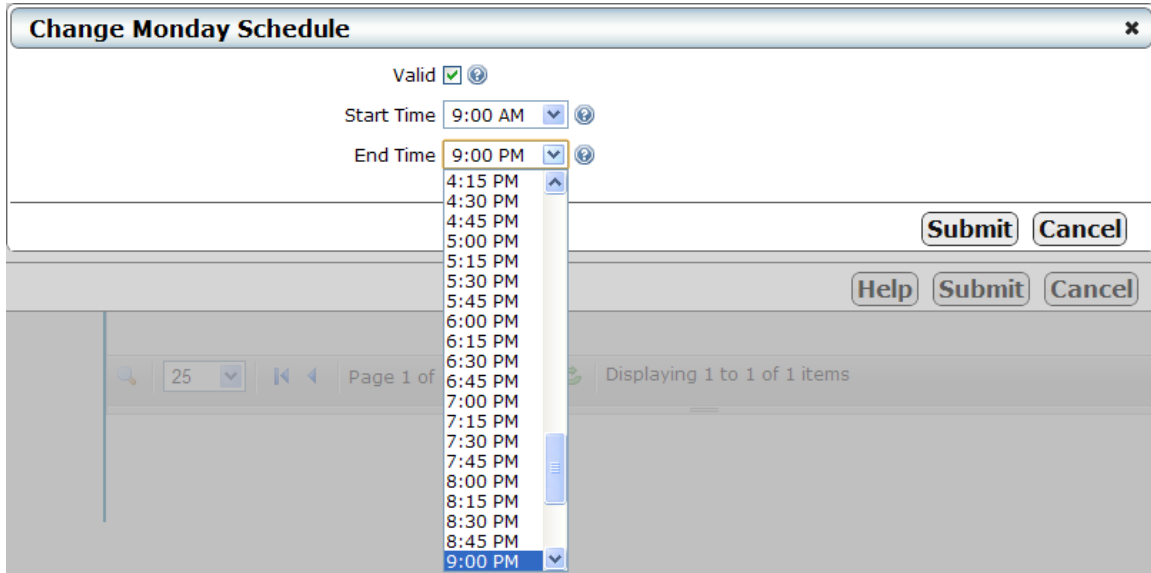
### 4.5.2.1.1 Selecting Start Time

To select desired start time first click on the menu's down arrow which will display time options. Select desired start time. The following is a sample image of the start time options:



### 4.5.2.1.2 Selecting End Time

To select desired end time first click on the menu's down arrow which will display time options. Select desired end time. The following is a sample image of the end time options:

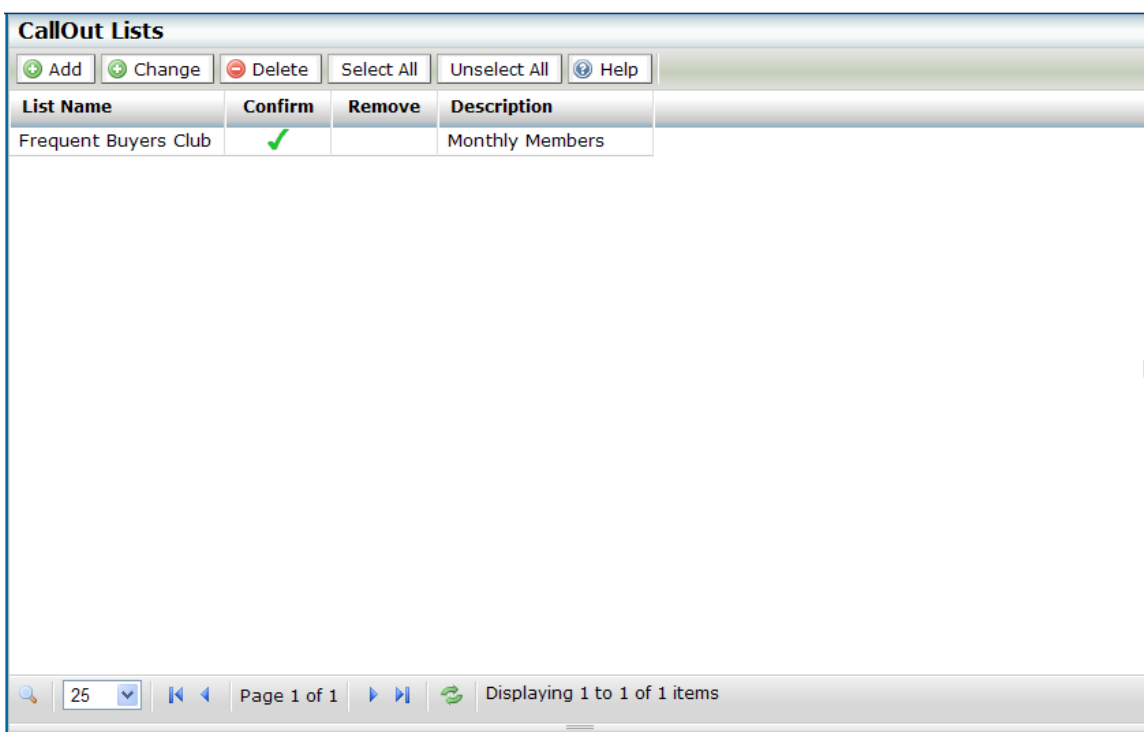


### 4.5.3 Deleting Call Schedules

To delete a call schedule first select the row(s) to delete then click the Delete button.

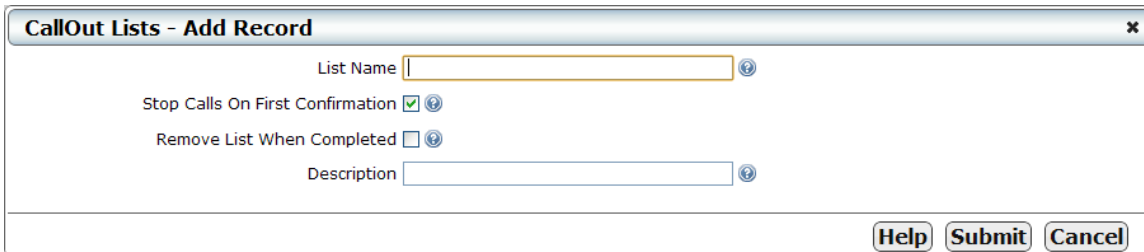
## 4.6 Callout Lists

To add, change, or delete callout lists click on the Callout Lists item in the Callouts submenu. The following image shows a sample grid for Callout Lists:



### 4.6.1 Adding Callout Lists

To add a callout list, click on the Add button. The following is a sample image of the Callout Lists dialogue box:



The following is an explanation of fields in this dialogue:

Field	Description
List Name	Name for this list
Stop Calls on First Confirmation	Check this box when you want to require call confirmation
Remove List When Completed	Check this box to automatically delete list when finished
Description	Description of this list

After all values have been entered click the Submit button.

## 4.6.2 Changing Callout Lists

To change callout list settings, first select a row to change then click the Change button. The following is a sample image of the Callout Lists dialogue box:

**CallOut Lists - Edit Record**

List Name

Stop Calls On First Confirmation

Remove List When Completed

Description

**Call List Entries**

Tel Num	Name
---------	------

15 Page 1 of 1 No items

You will only be able to change the values for the row you selected. After changing desired data click the Submit button.

### 4.6.2.1 Adding Call List Entries

To add a call list entry, click on the Add button. The following is a sample image of the Call List Entry dialogue box:

**Callout List - Add Record**

Telephone Number

Name

The following is an explanation of fields in this dialogue:

Field	Description
Telephone Number	Telephone number assigned to this entry
Name	Name of entry

After all values have been entered click the Submit button.

#### 4.6.2.2 Deleting Call List Entries

To delete a call list entry first select the row(s) to delete then click the Delete button.

#### 4.6.3 Deleting Call Lists

To delete a call list first select the row(s) to delete then click the Delete button.

### 4.7 Call List Progress

To view progress of an activated call list click on the Call List Progress item in the Callout submenu. The following image shows a sample grid for Call List Progress:

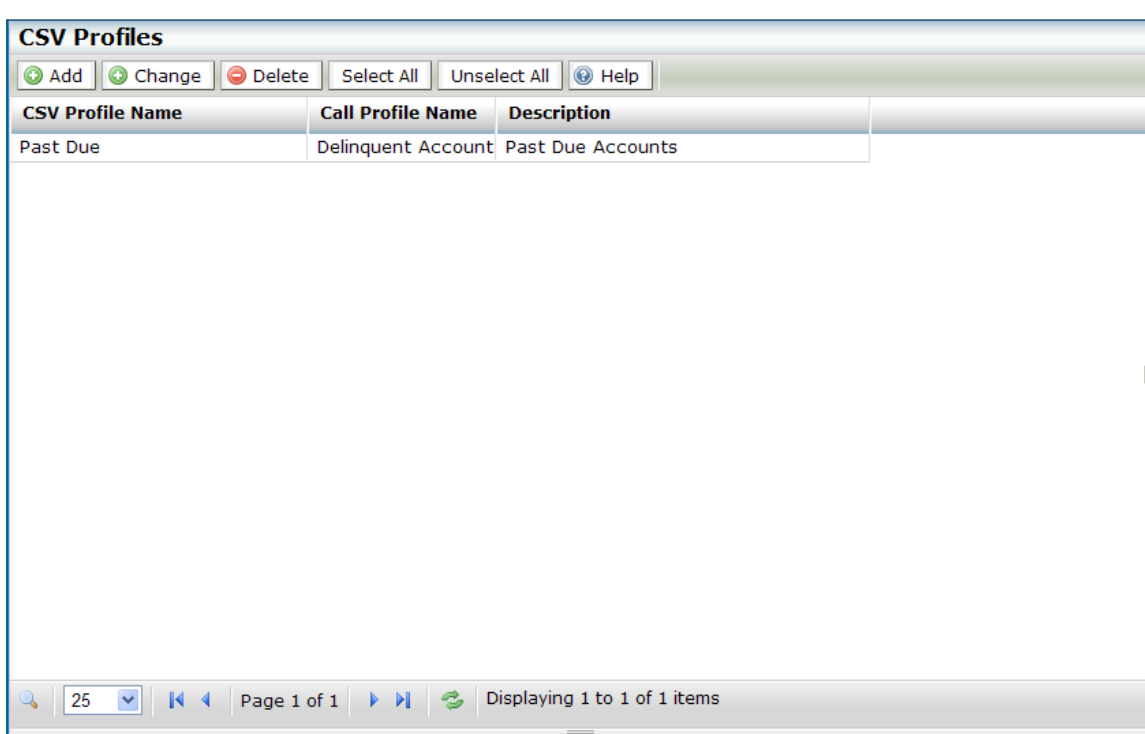
CallOut List Progress							
Callout	Callout List	Sequence	Phone Number	Calls	Last Called	Done	Abor

25 Page 1 of 1 No items

### 4.8 CSV Profiles

To add, change, or delete CSV profiles click on the CSV Profiles item in the Callouts submenu. The following image shows a sample grid for CSV Profiles:

## Guide To Callouts Configuration

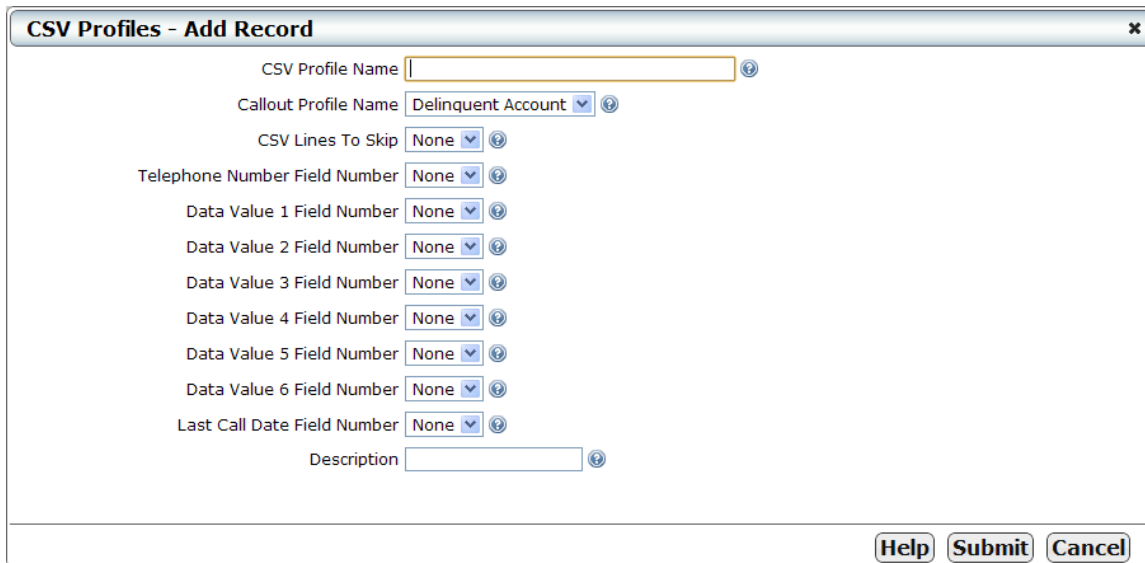


CSV Profile Name	Call Profile Name	Description
Past Due	Delinquent Account	Past Due Accounts

25 Page 1 of 1 Displaying 1 to 1 of 1 items

### 4.8.1 Adding CSV Profiles

To add a CSV Profile, click on the Add button. The following is a sample image of the CSV Profiles dialogue box:



CSV Profile Name

Callout Profile Name

CSV Lines To Skip

Telephone Number Field Number

Data Value 1 Field Number

Data Value 2 Field Number

Data Value 3 Field Number

Data Value 4 Field Number

Data Value 5 Field Number

Data Value 6 Field Number

Last Call Date Field Number

Description

Help Submit Cancel

The following is an explanation of fields in this dialogue:

## Guide To Callouts Configuration

Field	Description
CSV Profile Name	Name for this CSV profile
Callout Profile Name	Call profile to use for these calls
CSV Lines To Skip	Number of initial text lines to skip in this CSV profile
Telephone Number Field Number	Column number for telephone number field
Data Value 1 Field Number	Column number for data value 1 field
Data Value 2 Field Number	Column number for data value 2 field
Data Value 3 Field Number	Column number for data value 3 field
Data Value 4 Field Number	Column number for data value 4 field
Data Value 5 Field Number	Column number for data value 5 field
Data Value 6 Field Number	Column number for data value 6 field
Last Call Date Field Number	Last date to make these calls
Description	Description of this CSV profile

After all values have been entered and selected click the Submit button.

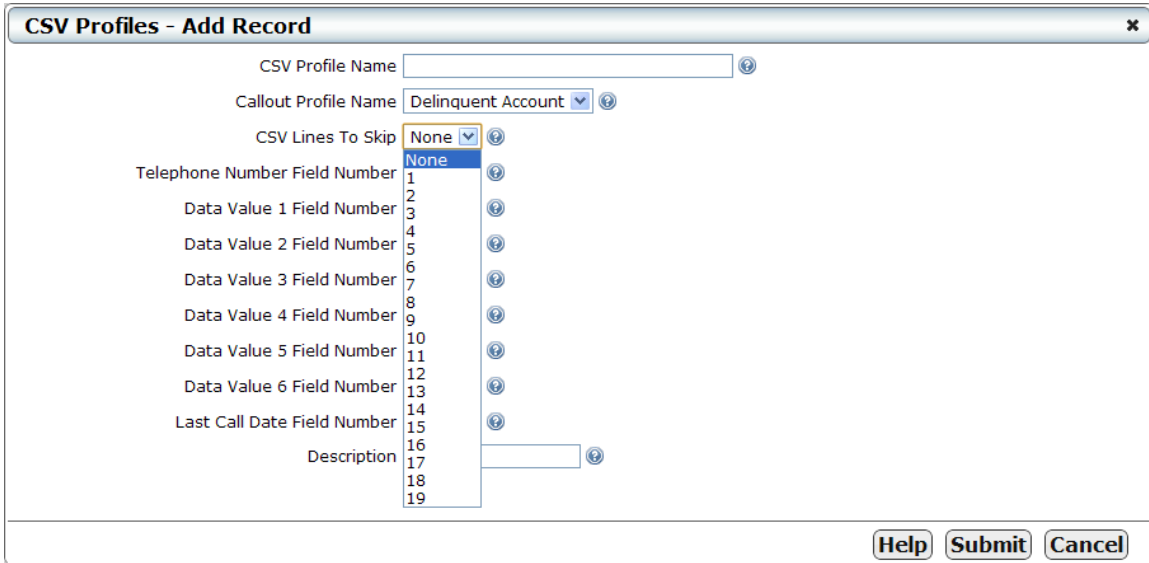
### 4.8.1.1 Selecting Callout Profile Name

To select desired callout profile name first click on the menu's down arrow which will display available profile options. Select desired profile name. The following is a sample image of the callout profile name options:

The screenshot shows a dialog box titled "CSV Profiles - Add Record". It contains several input fields and dropdown menus. The "Callout Profile Name" dropdown is open, showing "Delinquent Account" as the selected option. The other fields are: "CSV Profile Name" (text input), "CSV Lines To Skip" (dropdown menu with "None" selected), "Telephone Number Field Number" (dropdown menu with "None" selected), "Data Value 1 Field Number" (dropdown menu with "None" selected), "Data Value 2 Field Number" (dropdown menu with "None" selected), "Data Value 3 Field Number" (dropdown menu with "None" selected), "Data Value 4 Field Number" (dropdown menu with "None" selected), "Data Value 5 Field Number" (dropdown menu with "None" selected), "Data Value 6 Field Number" (dropdown menu with "None" selected), "Last Call Date Field Number" (dropdown menu with "None" selected), and "Description" (text input). At the bottom right, there are three buttons: "Help", "Submit", and "Cancel".

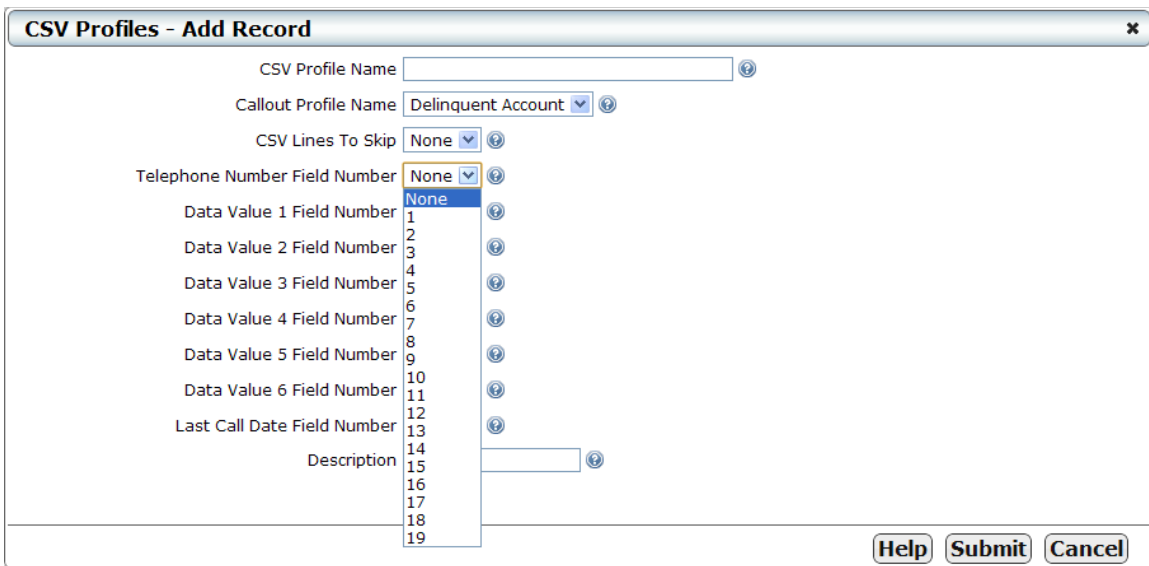
### 4.8.1.2 Selecting CSV Lines to Skip

To select desired quantity of CSV lines to skip first click on the menu's down arrow which will display numerical options. Select desired number. The following is a sample image of the quantity options:



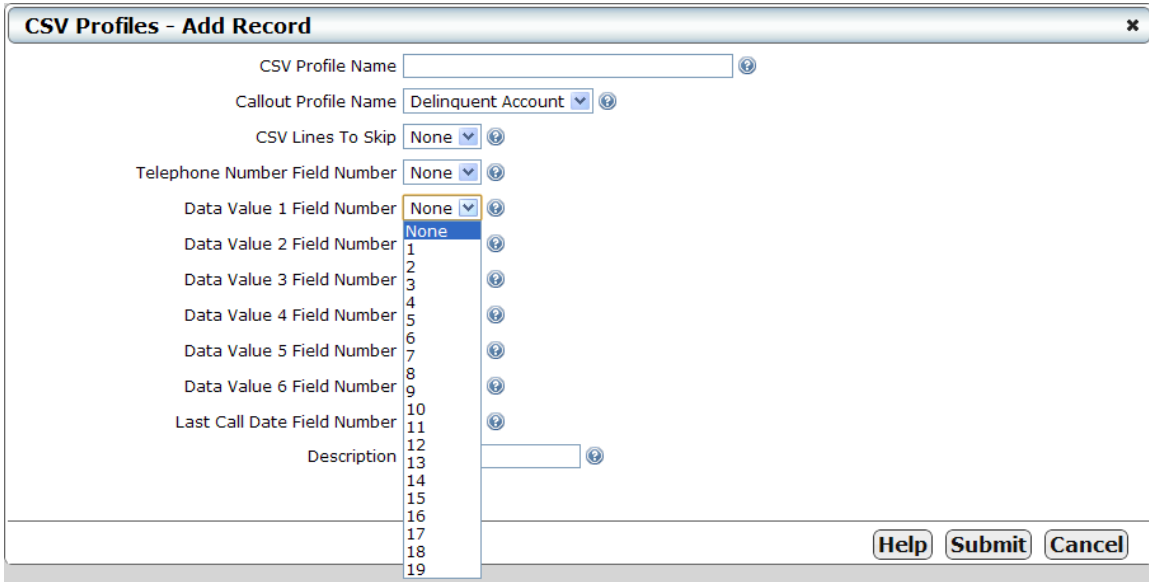
### 4.8.1.3 Selecting Telephone Number Field Number

To select desired field number first click on the menu's down arrow which will display field options. Select desired number. The following is a sample image of the field number options:



### 4.8.1.4 Selecting Data Value Field Numbers

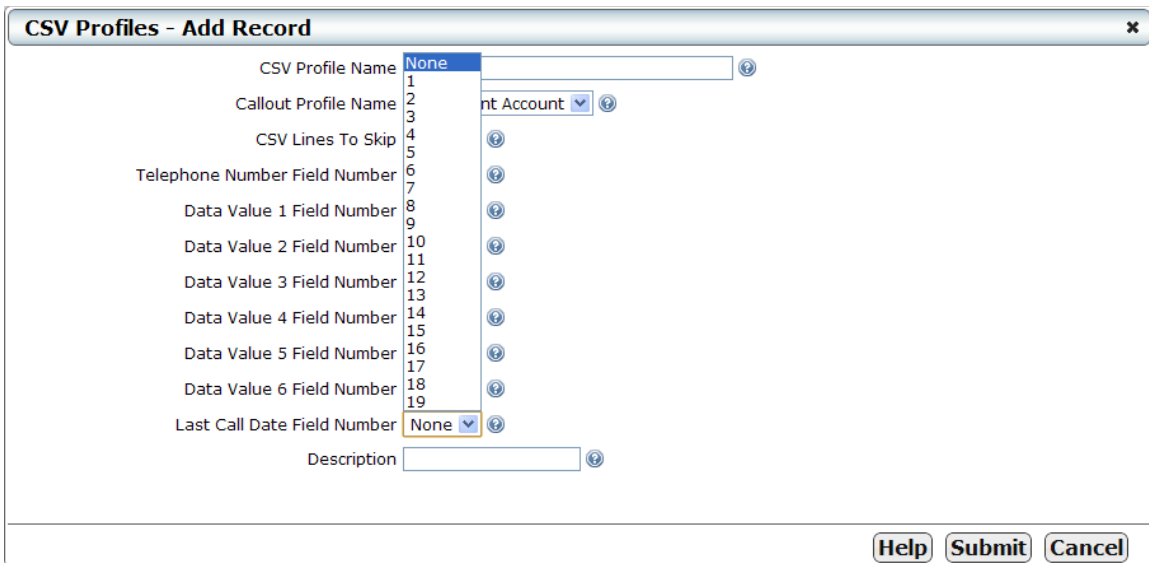
To select desired field number first click on the menu's down arrow which will display field options. Select desired number. The following is a sample image of the field number options:



Repeat process for Data Value Field Numbers 1 – 6.

### 4.8.1.5 Selecting Last Call Date Field Number

To select desired field number first click on the menu's down arrow which will display field options. Select desired number. The following is a sample image of the field number options:



## 4.8.2 Changing CSV Profiles

To change a CSV profile, first select a row to change then click the Change button. The following is a sample image of the CSV Profile dialogue box:

The image shows a dialog box titled "CSV Profiles - Edit Record". It contains the following fields and values:

- CSV Profile Name: Past Due
- Callout Profile Name: Delinquent Account
- CSV Lines To Skip: 4
- Telephone Number Field Number: 5
- Data Value 1 Field Number: 4
- Data Value 2 Field Number: 3
- Data Value 3 Field Number: 4
- Data Value 4 Field Number: 4
- Data Value 5 Field Number: 5
- Data Value 6 Field Number: 7
- Last Call Date Field Number: 16
- Description: Past Due Accounts

Buttons at the bottom right: Help, Submit, Cancel.

You will only be able to change the values for the row you selected. After changing desired data click the Submit button.

## 4.8.3 Deleting CSV Profiles

To delete a CSV profile first select the row(s) to delete then click the Delete button.

## 4.9 Do Not Call List

To add, change, or delete do not call list entries click on the Do Not Call List item in the Callout submenu. The following image shows a sample grid for the Do Not Call List:

Do Not Call List	
<input type="button" value="Add"/> <input type="button" value="Change"/> <input type="button" value="Delete"/> <input type="button" value="Select All"/> <input type="button" value="Unselect All"/> <input type="button" value="Help"/>	
Telephone Number	Created
469-644-9407	2011-02-09 11:46:27
469-380-5552	2011-02-09 11:46:45
818-995-4458	2011-02-09 11:46:54
713-664-8815	2011-02-09 11:47:02

25 Page 1 of 1 Displaying 1 to 4 of 4 items

### 4.9.1 Adding A Do Not Call List Entry

To add a do not call list entry, click on the Add button. The following is a sample image of the Do Not Call List dialogue box:

**Do Not Call List - Add Record** x

Telephone Number

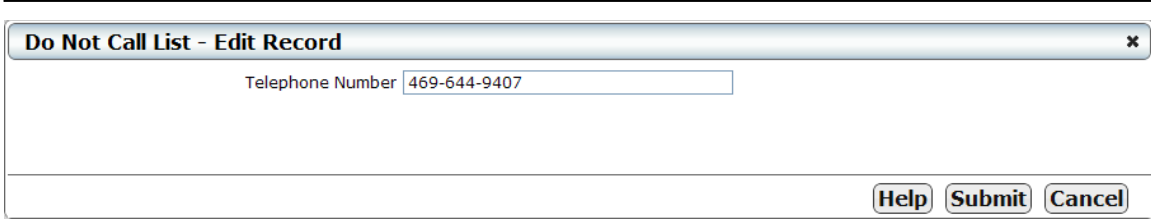
The following is an explanation of fields in this dialogue:

Field	Description
Telephone Number	Telephone number you wish to add

After all values have been entered click the Submit button.

### 4.9.2 Changing a Do Not Call List Entry

To change a do not call list entry, first select a row to change then click the Change button. The following is a sample image of the Do Not Call List dialogue box:



The image shows a dialog box titled "Do Not Call List - Edit Record". It contains a text input field labeled "Telephone Number" with the value "469-644-9407". At the bottom right, there are three buttons: "Help", "Submit", and "Cancel".

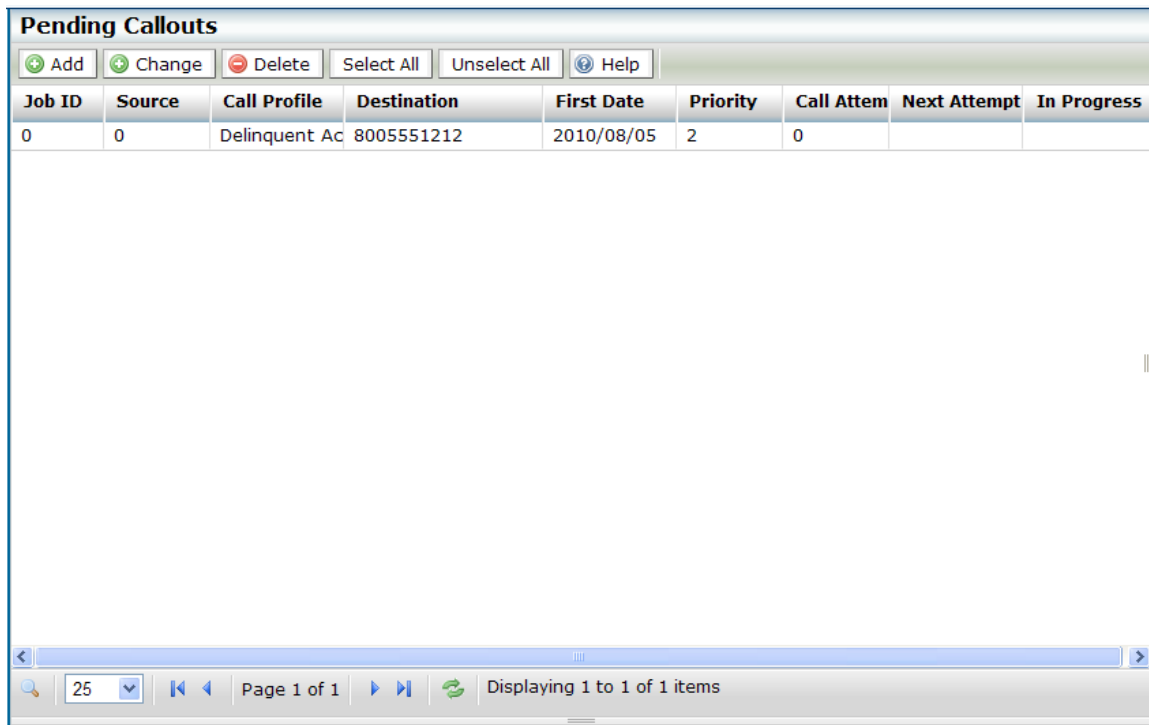
You will only be able to change the values for the row you selected. After changing desired data click the Submit button.

### 4.9.3 Deleting Do Not Call List Entries

To delete a do not call list entry select the row(s) to delete then click the Delete button.

### 4.10 Pending Callouts

To add, change, or delete pending callouts click on the Pending Callouts item in the Callout submenu. The following image shows a sample grid for Pending Callouts:



The image shows a "Pending Callouts" grid with a toolbar and a footer. The toolbar includes buttons for "Add", "Change", "Delete", "Select All", "Unselect All", and "Help". The grid has the following columns: Job ID, Source, Call Profile, Destination, First Date, Priority, Call Attem, Next Attempt, and In Progress. The first row contains the following data:

Job ID	Source	Call Profile	Destination	First Date	Priority	Call Attem	Next Attempt	In Progress
0	0	Delinquent Ac	8005551212	2010/08/05	2	0		

The footer shows a search icon, a dropdown menu with "25", navigation arrows, "Page 1 of 1", a refresh icon, and the text "Displaying 1 to 1 of 1 items".

#### 4.10.1 Adding Pending Callout

To add a pending callout, click on the Add button. The following is a sample image of the Pending Callout dialogue box:

## Guide To Callouts Configuration

**Pending Callouts - Add Record**
✕

Work Group Name  ⓘ

Job ID  ⓘ

Job Type  ⓘ

Source ID  ⓘ

Call List  ⓘ

Call Profile  ⓘ

Destination Telephone Number  ⓘ

First Date To Make Calls  ⓘ

Last Date To Make Calls  ⓘ

First Time To Call  ⓘ

Last Time To Call  ⓘ

ⓘ

ⓘ

ⓘ

ⓘ

ⓘ

ⓘ

The following is an explanation of fields in this dialogue:

Field	Description
Work Group Name	Work group this callout is for
Job ID	Numeric job ID associated with this call
Job Type	Job type associated with this call
Source ID	Numeric source ID for this call
Call List	Call list to use for this entry
Call Profile	Callout profile name to be used for t his callout
Destination Telephone Number	Telephone number of destination
First Date to Make Calls	First date calls can be made
Last Date to Make Calls	Last date calls can be made
First Time to Call	First time of day calls can be made
Last Time to Call	Last time of day calls can be made

After all values have been entered and selected click the Submit button.

Note: Bottom six fields in the Pending Callouts dialogue box are determined by Call Media settings.

### 4.10.1.1 Selecting Work Group Name

To select desired work group name click on the menu's down arrow which will display available group options. Select desired work group name. The following is a sample image of the group name options:

The screenshot shows a web form titled "Pending Callouts - Add Record". The form contains several fields for configuring a callout record. The "Work Group Name" field is a dropdown menu currently showing "main", with a blue arrow pointing down and a help icon. A dropdown menu is open below it, showing two options: "main" and "main2". Other fields include "Job ID" (with a help icon), "Job Type" (with a help icon), "Source ID" (with a help icon), "Call List" (with a help icon), "Call Profile" (with a help icon), "Destination Telephone Number" (with a help icon), "First Date To Make Calls" (2011/02/9, with a calendar icon and help icon), "Last Date To Make Calls" (2011/02/9, with a calendar icon and help icon), "First Time To Call" (Midnight, with a help icon), and "Last Time To Call" (Midnight, with a help icon). Below these fields are seven empty text input fields, each with a help icon. At the bottom right of the form are three buttons: "Help", "Submit", and "Cancel".

### 4.10.1.2 Selecting Call List

To select call list first click on the menu's down arrow which will display available lists. Select desired call list. The following is a sample image of the call list options:

The screenshot shows a dialog box titled "Pending Callouts - Add Record". It contains several input fields and dropdown menus. The "Call Profile" dropdown menu is open, showing two options: "Frequent Buyers" and "Past Due". The other fields are: "Work Group Name" (main), "Job ID" (0), "Job Type" (empty), "Source ID" (empty), "Call List" (empty), "Destination Telephone Number" (empty), "First Date To Make Calls" (2011/02/9), "Last Date To Make Calls" (2011/02/9), "First Time To Call" (Midnight), and "Last Time To Call" (Midnight). There are also six empty text input fields at the bottom. At the bottom right, there are three buttons: "Help", "Submit", and "Cancel".

### 4.10.1.3 Selecting Call Profile

To select a call profile first click on the menu's down arrow which will display available profile options. Select desired call profile. The following is a sample image of the profile options:

This screenshot is similar to the one above, but the "Call Profile" dropdown menu is open to the "Delinquent Account" option. The "Destination Telephone Number" field now contains the text "Delinquent Account". All other fields and buttons remain the same as in the previous screenshot.

### 4.10.1.4 Selecting First Date To Make Calls and Last Date to Make Calls

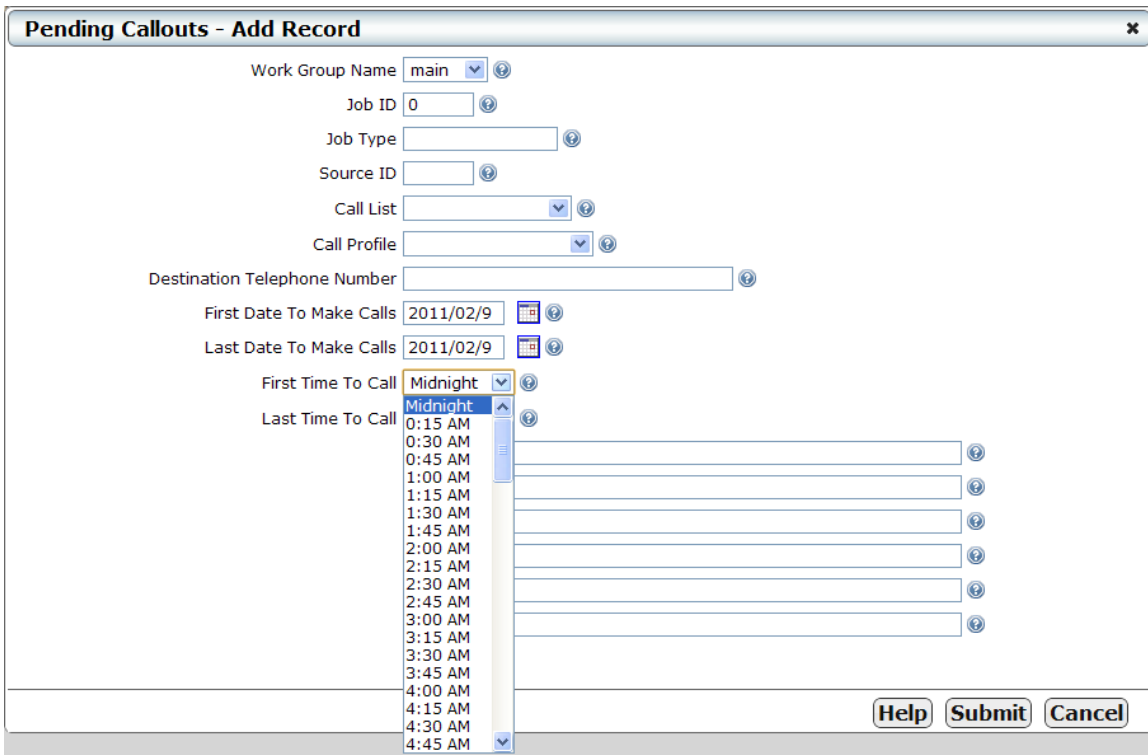
For both fields, click the calendar to the right hand side. The following is a sample image of the expanded calendar:



Use the > and < to move forward or backward a month and the >> and << to move forward and backward a year:

### 4.10.1.5 Selecting First Time to Call

To select first time to call click on the menu's down arrow which will display available time options. Select desired first time to call. The following is a sample image of the time options:



### 4.10.1.6 Selecting Last Time to Call

To select last time to call click on the menu's down arrow which will display available time options. Select desired last time to call. The following is a sample image of the time options:

The screenshot shows a dialog box titled "Pending Callouts - Add Record". It contains several input fields and dropdown menus. The "Last Time to Call" dropdown menu is open, displaying a list of time options: Midnight, 0:15 AM, 0:30 AM, 0:45 AM, 1:00 AM, 1:15 AM, 1:30 AM, 1:45 AM, 2:00 AM, 2:15 AM, 2:30 AM, 2:45 AM, 3:00 AM, 3:15 AM, 3:30 AM, 3:45 AM, 4:00 AM, 4:15 AM, 4:30 AM, and 4:45 AM. The "Submit" button is highlighted in the bottom right corner.

### 4.10.2 Changing Pending Callouts

To change pending callout settings, first select a row to change then click the Change button. The following is a sample image of the Pending Callouts dialogue box:

## Guide To Callouts Configuration

**Pending Callouts - Edit Record**

Work Group Name: main

Job ID: 0

Job Type:

Source ID: 0

Call List:

Call Profile: Delinquent Account

Destination Telephone Number: 8005551212

First Date To Make Calls: 2010/08/05

Last Date To Make Calls: 2010/08/05

First Time To Call: Midnight

Last Time To Call: Midnight

Account Name:

Past Due Date:

Help Submit Cancel

You will only be able to change the values for the row you selected. After changing desired data click the Submit button.

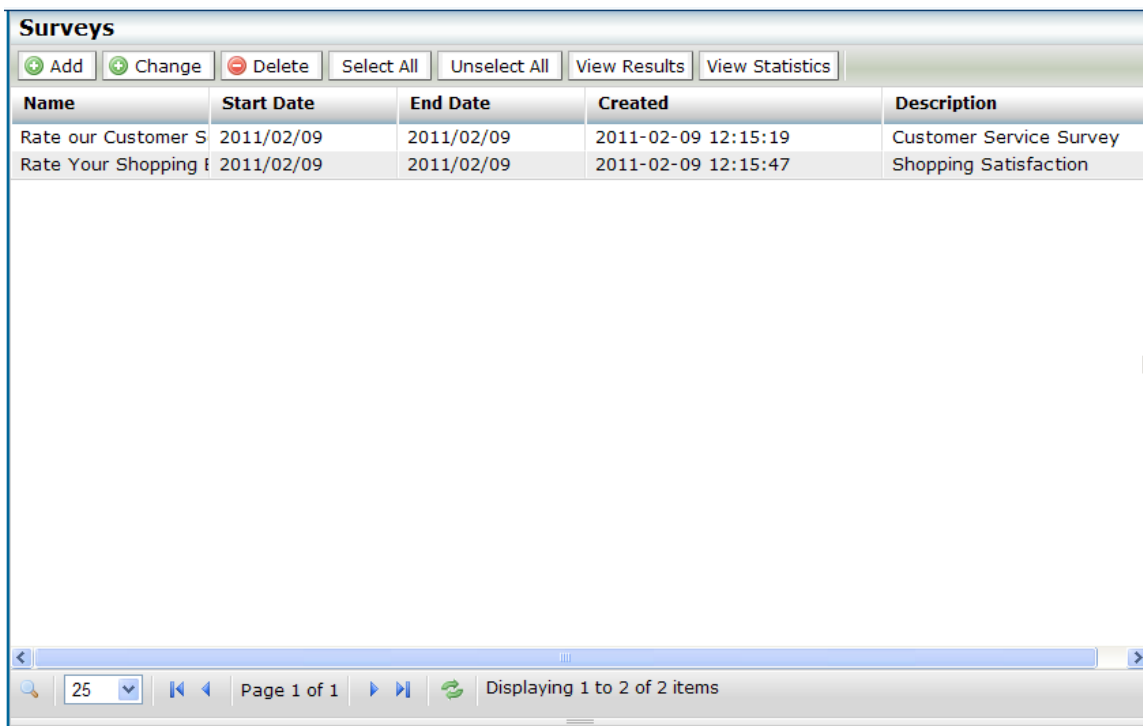
### 4.10.3 Deleting Pending Callouts

To delete a pending callout select the row(s) to delete then click the Delete button.

### 4.11 Surveys

To add, change, or delete surveys click on the Surveys item in the Callout submenu. The following image shows a sample grid for Surveys:

## Guide To Callouts Configuration



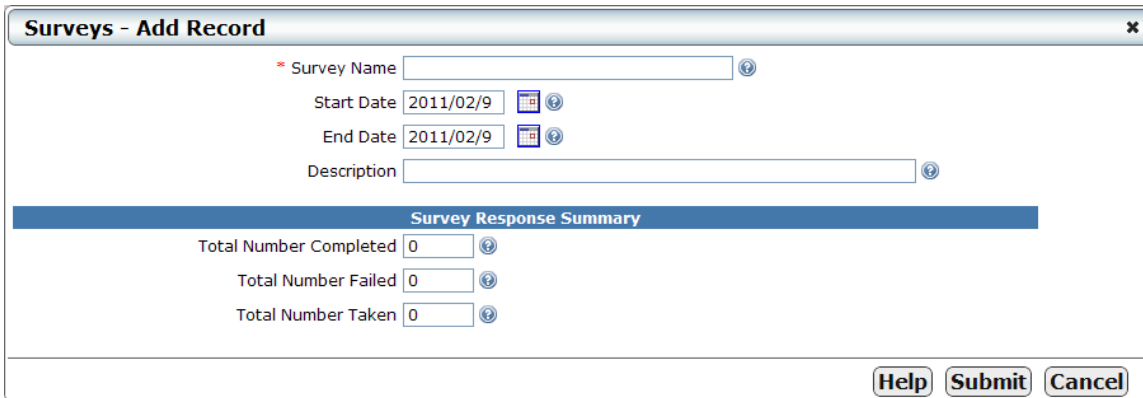
The screenshot shows a web application window titled "Surveys". At the top, there is a toolbar with buttons for "Add", "Change", "Delete", "Select All", "Unselect All", "View Results", and "View Statistics". Below the toolbar is a table with the following columns: "Name", "Start Date", "End Date", "Created", and "Description". The table contains two rows of data:

Name	Start Date	End Date	Created	Description
Rate our Customer S	2011/02/09	2011/02/09	2011-02-09 12:15:19	Customer Service Survey
Rate Your Shopping f	2011/02/09	2011/02/09	2011-02-09 12:15:47	Shopping Satisfaction

At the bottom of the window, there is a pagination bar showing "Page 1 of 1" and "Displaying 1 to 2 of 2 items".

### 4.11.1 Adding Surveys

To add a survey, click on the Add button. The following is a sample image of the Surveys dialogue box:



The screenshot shows a dialog box titled "Surveys - Add Record". It contains the following fields:

- \* Survey Name**: A text input field with a help icon.
- Start Date**: A date picker showing "2011/02/9" with a help icon.
- End Date**: A date picker showing "2011/02/9" with a help icon.
- Description**: A text input field with a help icon.

Below these fields is a section titled "Survey Response Summary" with three rows of data:

Survey Response Summary	
Total Number Completed	0
Total Number Failed	0
Total Number Taken	0

At the bottom right of the dialog box, there are three buttons: "Help", "Submit", and "Cancel".

The following is an explanation of fields in this dialogue:

Field	Description
Survey Name	Name of this survey
Start Date	The date this survey starts
End Date	The date this survey ends

Field	Description
Description	Description of this survey
Total Number Completed	Number of completed survey calls
Total Number Failed	Number of failed survey calls
Total Number Taken	Number of taken survey calls

After all values have been entered and selected click the Submit button.

#### 4.11.1.1 Selecting Start Date and End Date

For both fields, click the calendar to the right hand side. The following is a sample image of the expanded calendar:



Use the > and < to move forward or backward a month and the >> and << to move forward and backward a year:

#### 4.11.2 Changing Surveys

To change a survey first select a row to change then click the Change button. The following is a sample image of the Surveys dialogue box:

**Surveys - Edit Record**

\* Survey Name

Start Date

End Date

Description

**Survey Response Summary**

Total Number Completed

Total Number Failed

Total Number Taken

**Survey Questions**

Prompt	Description	Min Digits	Max Digits	Valid Digits
No items				

15 Page 1 of 1

You will only be able to change the values for the row you selected. After changing desired data click the Submit button.

#### 4.11.2.1 Adding A Survey Question

To add a survey question, click on the Add button. The following is a sample image of the Survey Question dialog box:

**Survey Questions - Add Record**

Audio Prompt

Question Description

Minimum Digits To Collect

Maximum Digits To Collect

Valid Digits To Collect

The following is an explanation of fields in this dialogue:

## Guide To Callouts Configuration

---

<b>Field</b>	<b>Description</b>
Audio Prompt	Audio Prompt for this question
Question Description	Description of this question
Minimum Digits to Collect	Minimum number of digits allowed to be entered as a response
Maximum Digits to Collect	Maximum number of digits allowed to be entered as a response
Valid Digits to Collect	Valid digits allowed to be entered as a response

### 4.11.2.1.1 Selecting Minimum Digits to Collect

To select minimum digits to collect click on the menu's down arrow which will display available options. Select desired number of minimum digits to collect. The following is a sample image of the number options:

The image shows a dialog box titled "Survey Questions - Add Record" with a close button (X) in the top right corner. The dialog contains several input fields and a dropdown menu:

- Audio Prompt:** A text input field with a help icon (question mark in a circle) to its right.
- Question Description:** A text input field with a help icon (question mark in a circle) to its right.
- Minimum Digits To Collect:** A dropdown menu currently showing "1" with a small downward arrow and a help icon (question mark in a circle) to its right. The dropdown list is open, showing numbers from 1 to 19.
- Maximum Digits To Collect:** A text input field with a help icon (question mark in a circle) to its right.
- Valid Digits To Collect:** A text input field with a help icon (question mark in a circle) to its right.

At the bottom right of the dialog, there are two buttons: "Submit" and "Cancel".

### 4.11.2.1.2 Selecting Maximum Digits to Collect

To select maximum digits to collect click on the menu's down arrow which will display available options. Select desired number of maximum digits to collect. The following is a sample image of the number options:

The screenshot shows a dialog box titled "Survey Questions - Add Record". It contains several input fields: "Audio Prompt", "Question Description", "Minimum Digits To Collect" (set to 1), "Maximum Digits To Collect" (set to 1), and "Valid Digits To Collect" (set to 1). The "Maximum Digits To Collect" dropdown menu is open, displaying a list of numbers from 1 to 19. The "Submit" and "Cancel" buttons are located at the bottom right of the dialog box.

### 4.11.2.2 Changing Survey Questions

To change a question first select a row to change then click the Change button. The following is a sample image of the Survey Questions dialogue box:

The screenshot shows a dialog box titled "Survey Questions - Edit Record". It contains several input fields: "Audio Prompt" (containing "30 days?"), "Question Description" (containing "30 history"), "Minimum Digits To Collect" (set to 1), "Maximum Digits To Collect" (set to 10), and "Valid Digits To Collect" (set to 1). The "Submit" and "Cancel" buttons are located at the bottom right of the dialog box.

### 4.11.2.3 Deleting Survey Questions

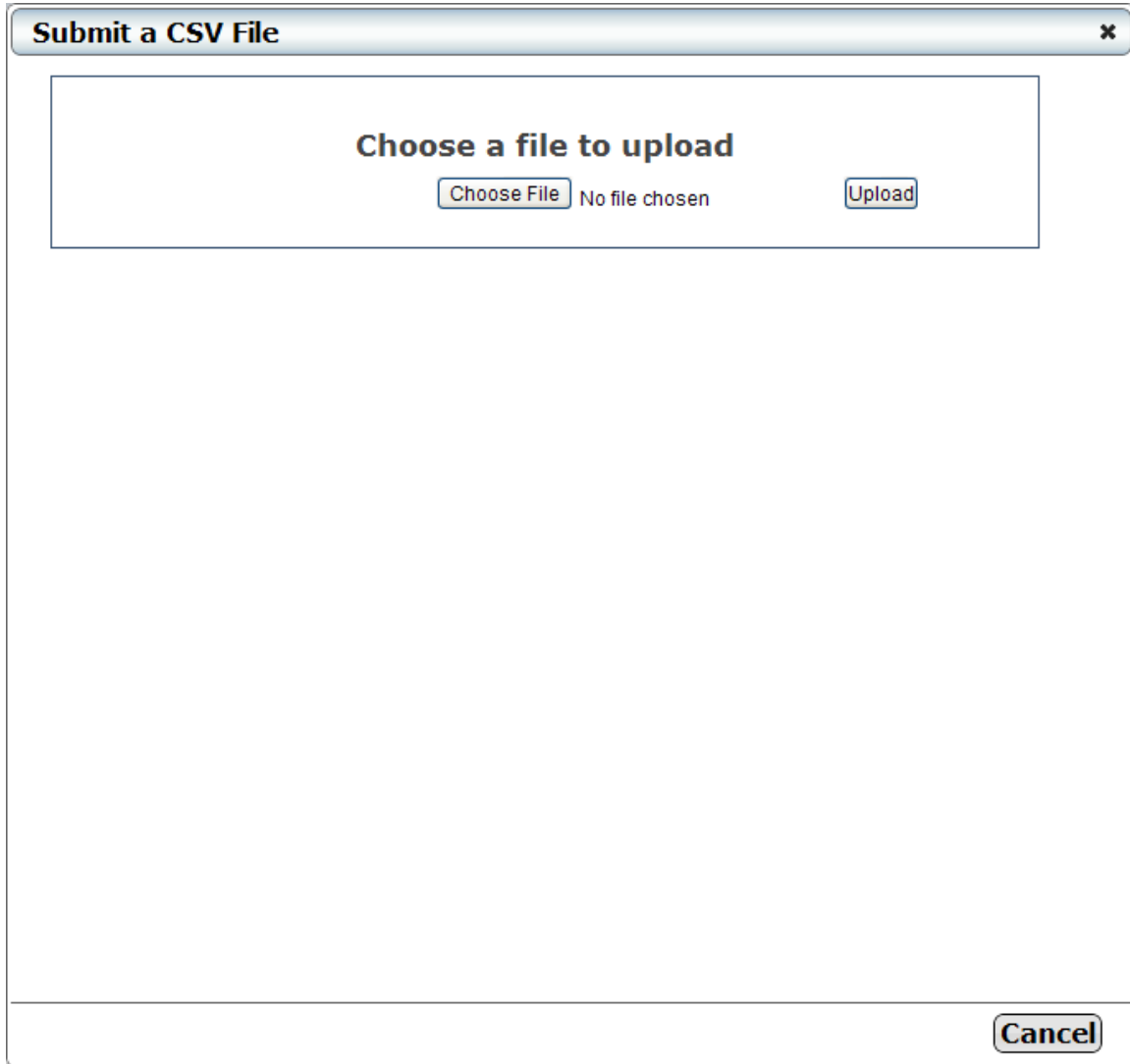
To delete a survey question select the row(s) to delete then click the Delete button

### 4.11.3 Deleting a Survey

To delete a survey select the row(s) to delete then click the Delete button.

## 4.12 Upload a CSV File

To upload a CSV file click on the Upload CSV File item in the Callout submenu. The following image shows a sample dialogue box for uploading a CSV File:



Choose desired file to upload and click the Upload button.

---

# Evaluation

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We hope you found this document useful, and easy to use. To help us provide you with the best documentation possible, we would like to get your feedback on this document. Please complete this form and use one of the following methods to return it to us:

- mail it to Telegato LLC  
801 East Campbell Road  
Suite 190  
Richardson, TX 75081
- fax it to (214) 853-5710
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Please check Yes or No.

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- Is this manual technically accurate? Yes  No   
If no, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Is information missing? Yes  No   
If yes, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Are the organization and layout clear? Yes  No   
If no, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Is information easy to find? Yes  No   
If no, please explain: \_\_\_\_\_  
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- How could we improve this document? \_\_\_\_\_  
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100-6.1-068-001-1.1  
Software Release 6.1, Document Issue 1.1