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SonataSuite Dialer

VitalPBX

Have an efficient way for faster
and more organized communication

CONTENT

Content

Introduction

Sonata Suite is a group of applications that integrate with VitalPBX. Below is a list of the applications available in Sonata Suite.:

- Switchboard
- Call Accounting System
- Recording Management System
- Call Center Reports (Stats)
- **Dialer**

Beta Tester

To install the beta version of Sonata Dialer you must add the beta repository, for which you must go to and follow the instructions:
https://github.com/VitalPBX/vitalpbx-cr-repo

Then enter the console and execute the following commands:

```
[root@vitalpbx ~]# yum clean all
[root@vitalpbx ~]# yum install sonata-dialer
```

Sonata Dialer

Sonata Dialer is an application that allows you to make calls automatically.

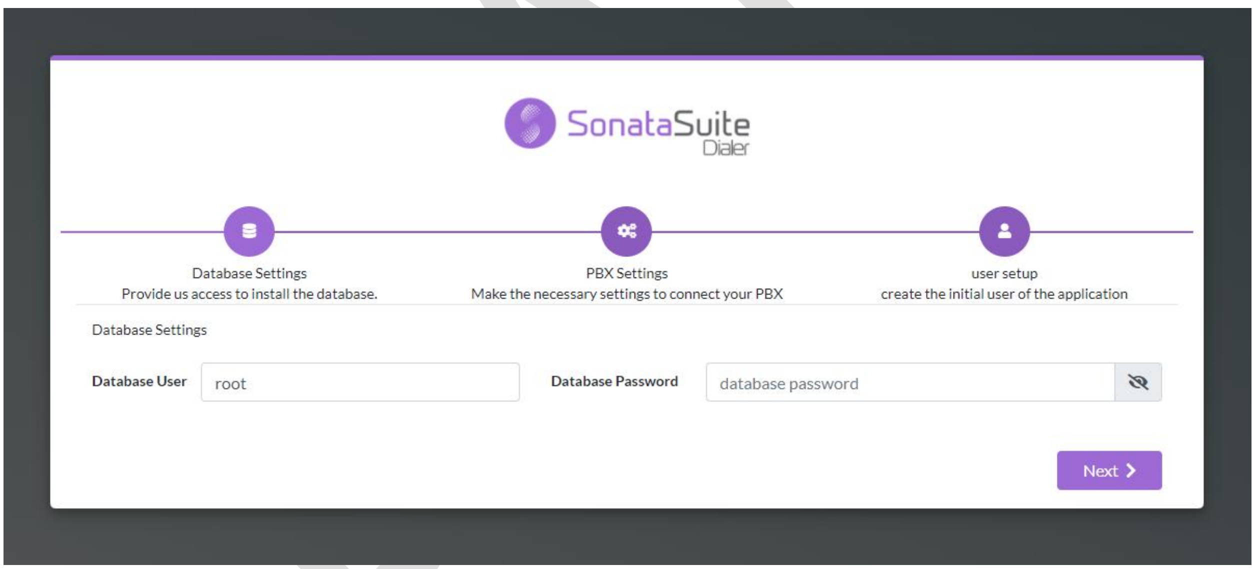
1.- Installation

Sonata Dialer only works with VitalPBX 3.0 onwards. To install Sonata Dialer, it is necessary to go to Add-ons in VitalPBX, search in the list and press the Install button and wait a few minutes, once the installation is finished, we must go to the url pressing the Addon called Sonata Dialer.

Now a wizard will be displayed to guide us to finalize the configuration.

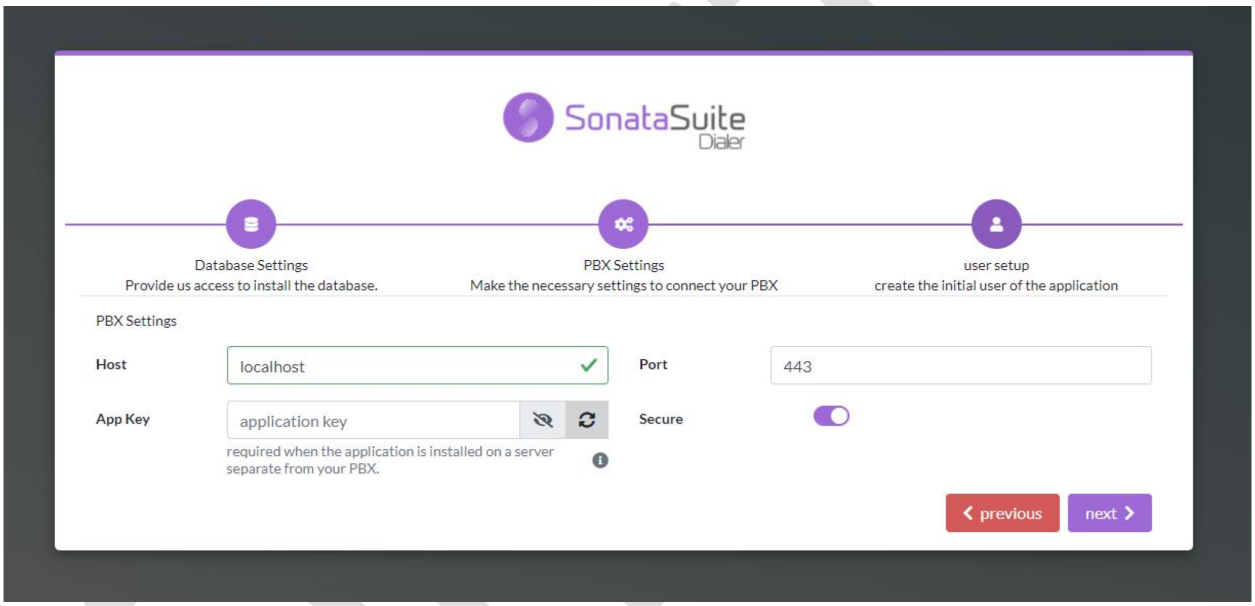
a.- Database Settings:

- **Database User**, MySQL user, if we are on the same server, you can leave the root user without password, otherwise you must create a user in Mariadb to access remotely.
- **Database Password**, if we are on the same server the root user usually does not have a password, if we are accessing remotely the user and password must be created in Mariadb.



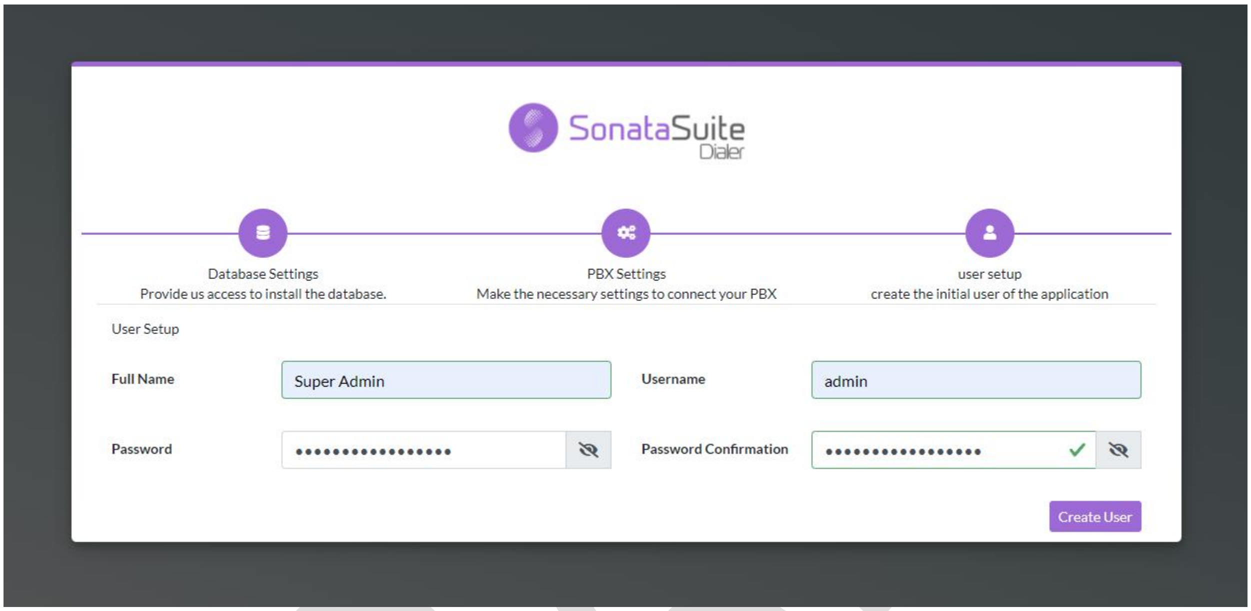
b.- PBX Settings:

- **Host**, if installed on the same server it is advisable to write **localhost** otherwise, we must write the host or remote IP.
- **Port**, if our server has a valid certificate and all requests are redirected to https, we should configure port 443 and we do not have https configure port 80. If we are going to access remotely remember to open these ports in the firewall.
- **App key**, If Sonata Dialer is in the same server as VitalPBX it is not necessary to configure the API Key since it is obtained automatically. If Sonata Dialer is installed in a different server than VitalPBX it is necessary to create an App Key in VitalPBX to be able to connect, for which we go to the menu of VitalPBX, ADMIN/Admin/Application Keys, create a new one, copy it and write it here.
- **Secure**, indicates a secure https connection, usually port 443 is used when this option is selected.

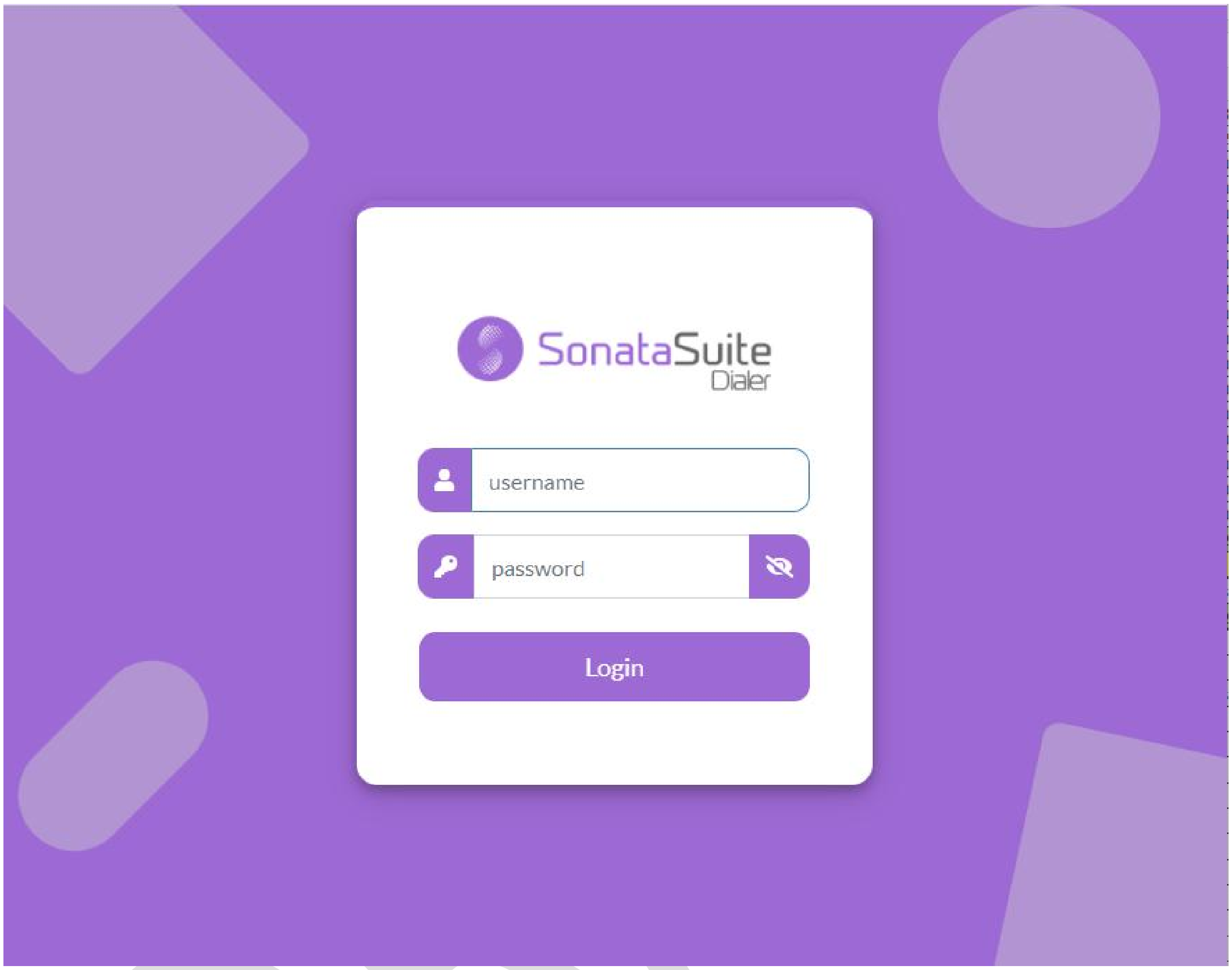


c.- User Settings

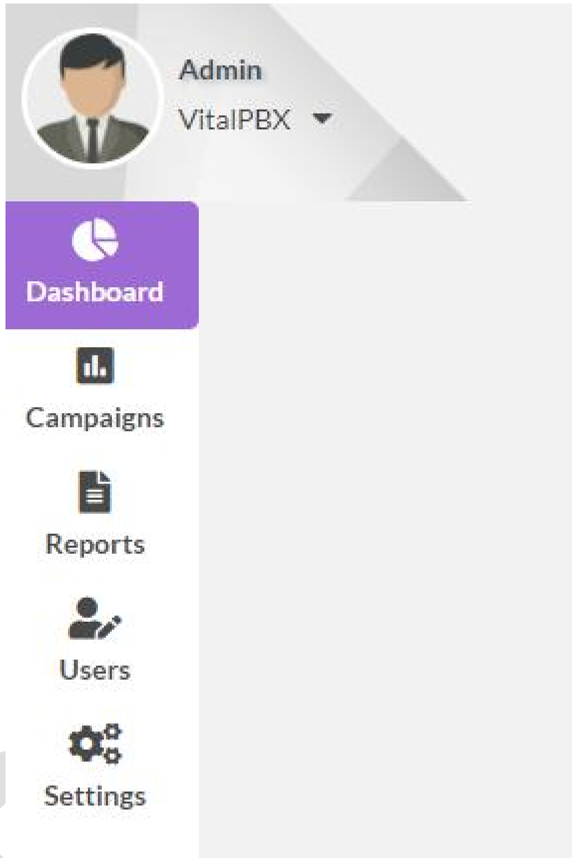
- **Full Name**, full name of the System Administrator.
- **Username**, system administrator user, usually admin.
- **Password**, password for administrator access.
- **Password Confirmation**, password confirmation administrator.



d.- Log in with the user and password previously created.



2.- Menu



In the menu we have the following options:

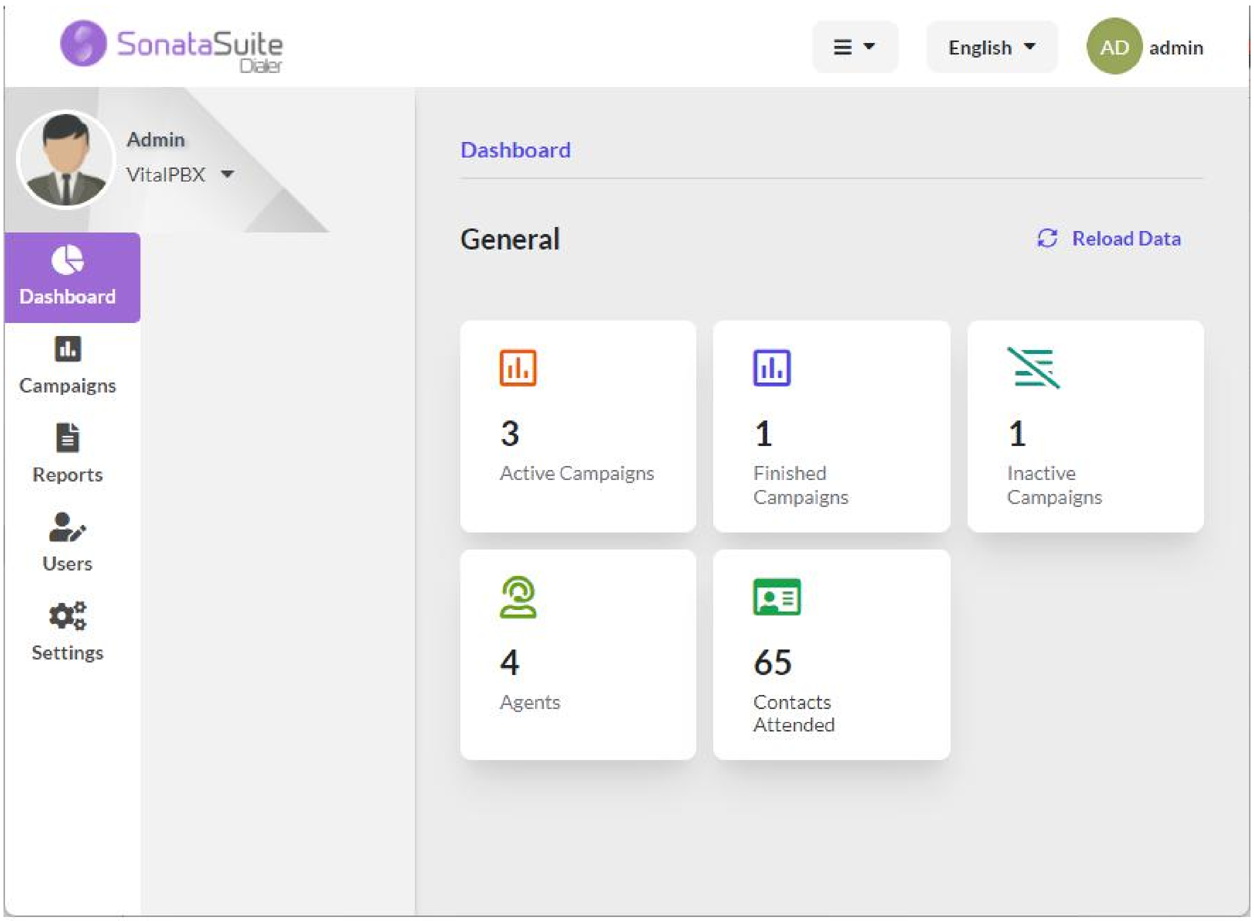
- **Dashboard**, here we will be able to see the campaigns and active agents, as well as contacts attended, etc.
- **Campaigns**, here the campaigns are completely configured, this menu has the following options:
    - **Campaigns**, although it is the last option to configure, it is where the campaign is assembled with all the previously configured data.
    - **Contact Lists**, here we load the list of contacts to be used in the campaign, it allows CSV, XLS or XLSX formats.
    - **Disposition Groups,** the layout groups are configured, i.e. the result to be selected by the agent at the end of the call.
    - **Form**, the form to be used in each campaign is created. This form is to fill out additional information related to each call.
    - **Queues**, in order to keep statistics and to be able to assign agents to each company, it is necessary to create call queues, these queues are associated to the agents.
- **Reports**, Reports by Agent, Dispositions and Call by Agent.
    - **Agents Report**, it is possible to generate reports on the activity of each agent within a campaign.

- **Dispositions**, it is possible to see the overall result of each campaign by layout.
- **Call By Agent**, shows the details of each Agent's calls.

- **Users**, here we create the system users with their respective privileges.
  - **Users**, create the users and associate them to the Role and Agent Profile, as well as to an extension.
  - **Pause Profiles**, we create the pause causes which we are going to relate to the user.
  - **Roles,** we create the role that gives us access to each module of the App.
  - **System Permissions,** we associate the Agents with queues and campaigns.
- **Settings**, in this section the following parameters are configured.
  - **General Settings**, configure the App's time zone.
  - **Ice Server**, as the App has the possibility to work with Softphone integrated with WebRTC technology, it is sometimes necessary to define STUN servers.
  - **PBX Settings**, this form configures the connection with the host from which we are going to extract the information to be displayed.

3.- Dashboard

In the Dashboard we show the campaigns and Agents as well as the total number of contacts served.



4.- Campaigns

To create a campaign, the following must be considered:

1. **Contact Lists**, is the list of contacts to call, a single list can be created and used in multiple campaigns.
2. **Disposition Groups**, very important since the groups are created to typify the result of each call.
3. **Form**, a form is created where additional data can be associated to the data imported in the Contact List.
4. **Queues,** in order to store event history for each agent it is necessary to create queues, and these are associated to the campaign.

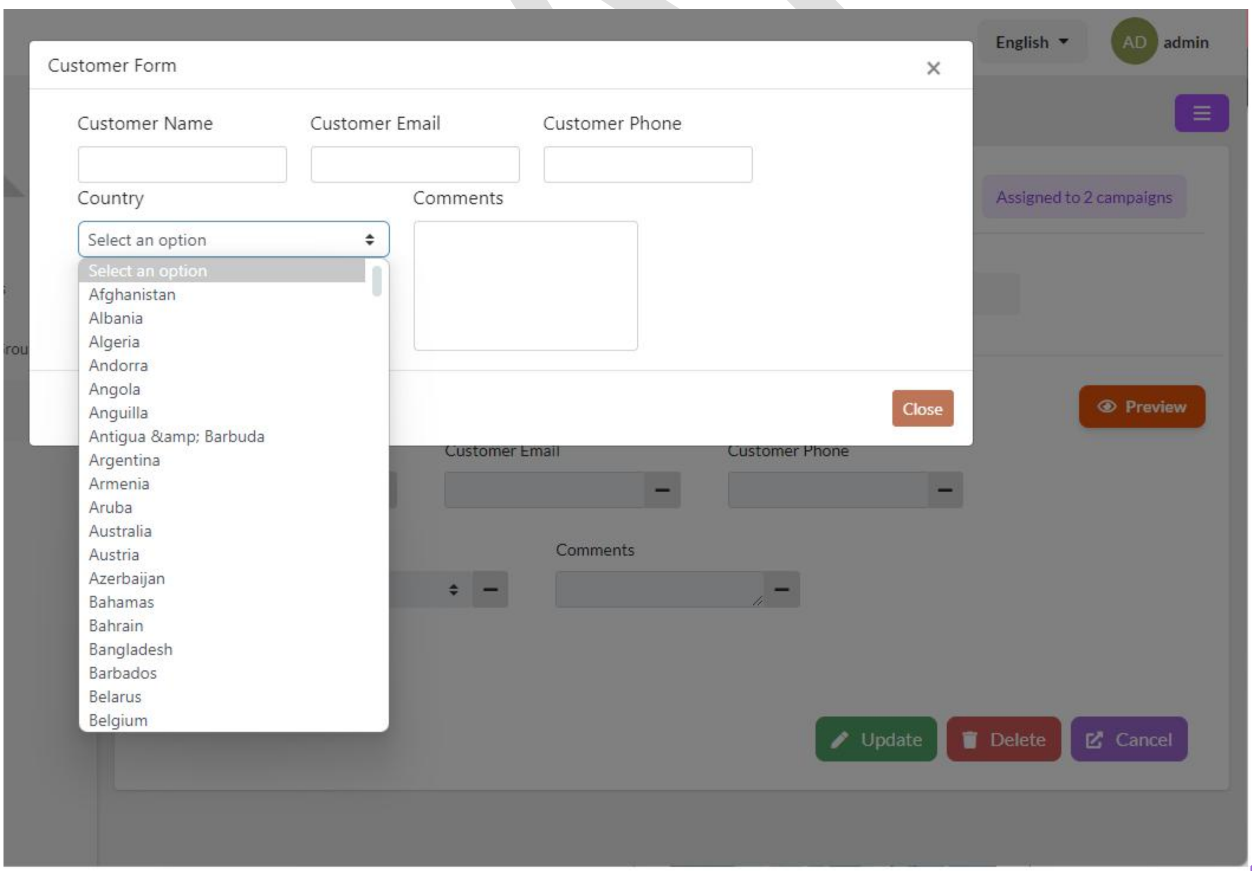
Here is the most logical order to create a campaign from scratch.

4.1.- Forms

To create the form, go to Campaigns/Form. You can create forms with the following types of fields:

- **Text**, accepts any type of text.
- **Email**, only accepts valid emails.
- **Select**, shows multiple selections. They come predefined:
    - **Country**, list of all countries in the world.
    - **US States**, list of all U.S. states.
    - **Gender**, male, female.
    - **Months of the year**, months of the year.
    - **Days of the week**, days of the week.
- **Number**, accepts only numbers.
- **Checkboxes**, accepts only true or false.
- **Radio Buttons**, accepts only one selection.
- **Date**, accepts only date format.
- **Time**, accepts only time format.
- **Textarea**, like Text with the difference that it accepts multiple lines.

All fields are read-only and required, which is optional when creating the field in the form.



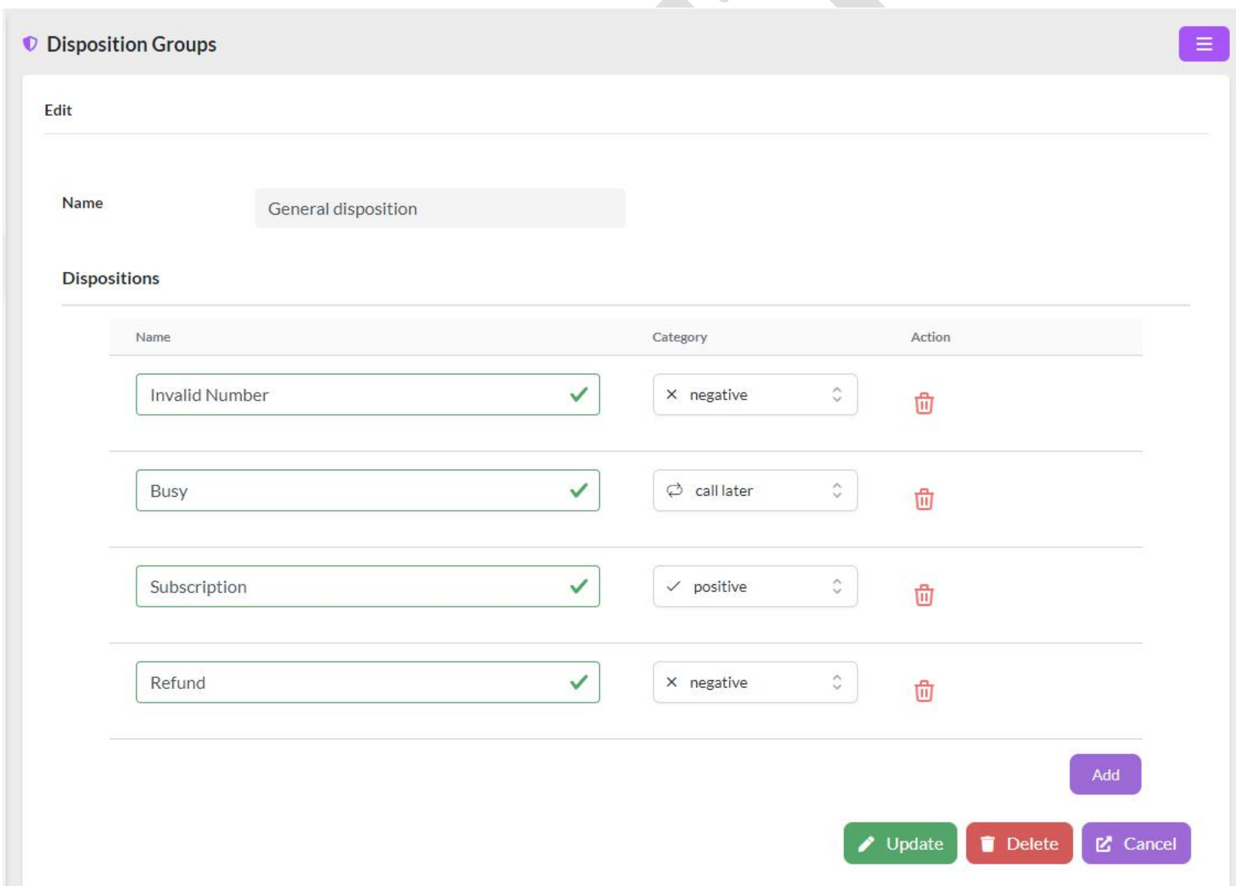
4.2.- Disposition Groups

The disposition groups help us to catalog the result of the call in an easy and fast way, it is part of the form that is shown to the agent when he/she is on the call.

To create a disposition group, go to Campaigns/Disposition Groups.
The default layout categories are:

- **Negative**, can be associated when the call did not give the expected result.
- **Positive**, can be associated when the call gave the expected result.
- **Call Later**, can be associated when the contact person told us to call you back.

The following is an example configuration:



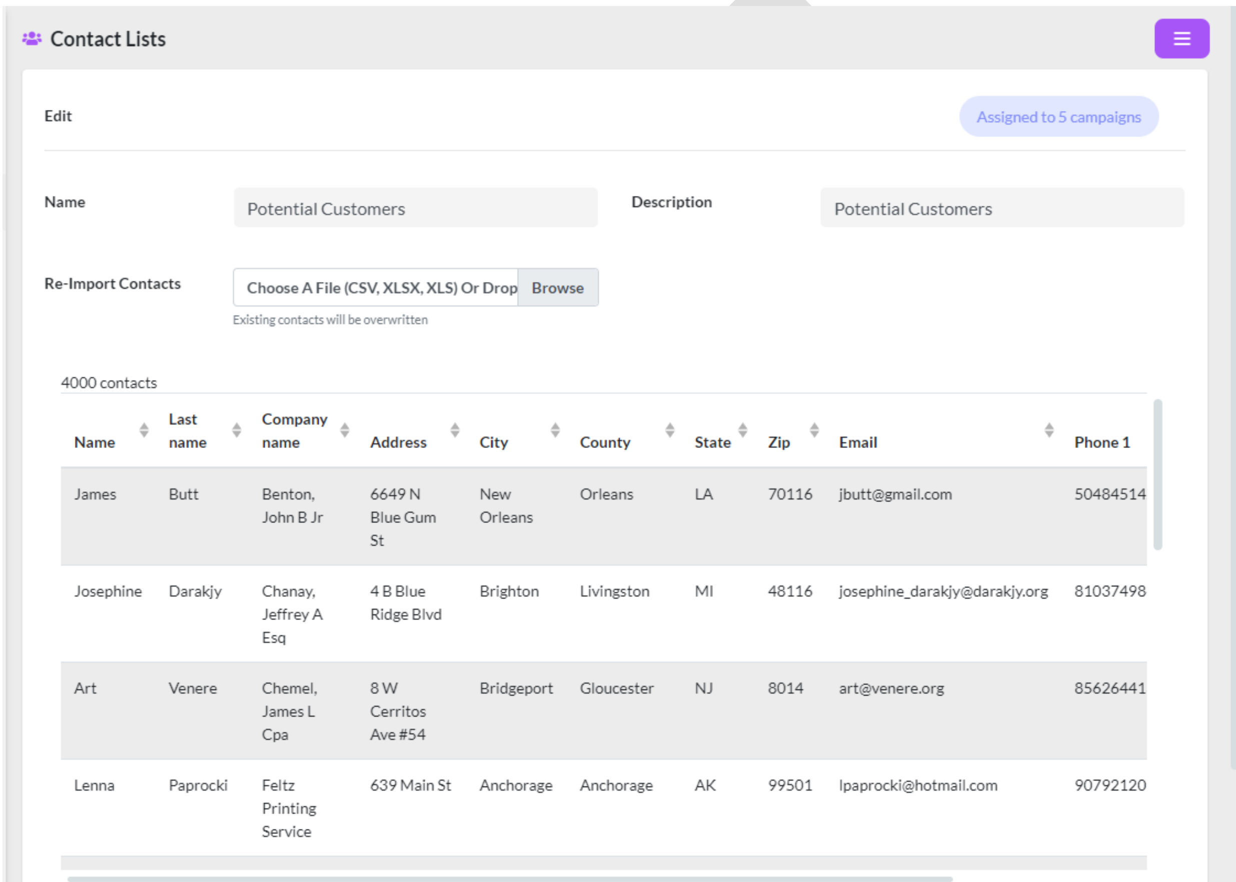
4.3.- Contact Lists

To complete what is necessary to create a campaign, the list of numbers to be called must be created, it is in this module that these numbers are added.

To create lists, go to Campaigns/Contacts Lists. The following formats are supported:

- CSV
- XLS
- XLSX

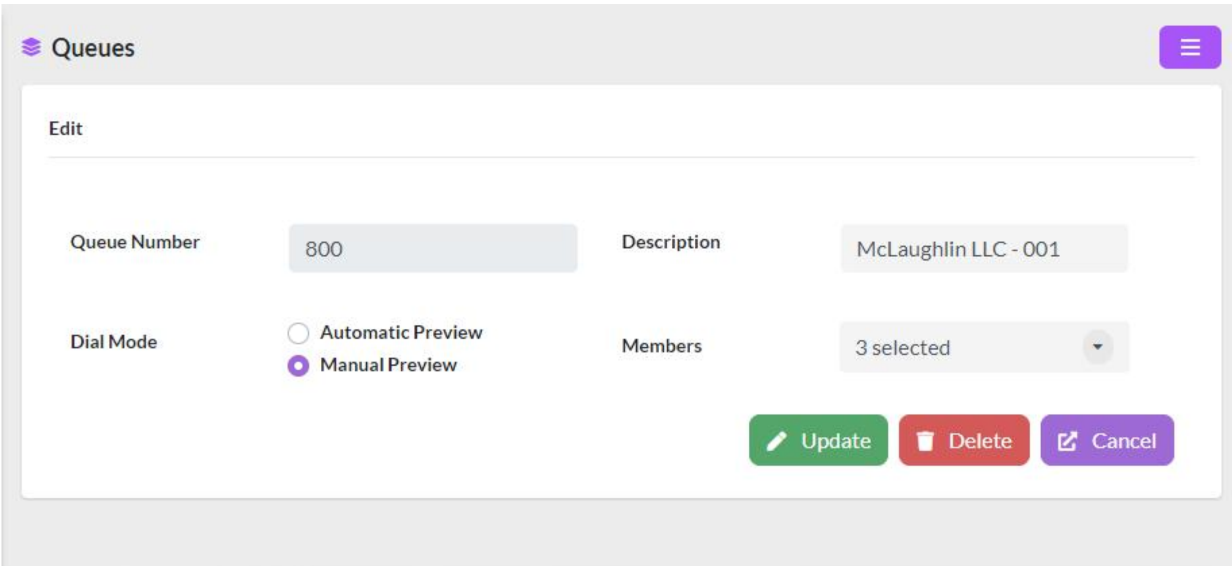
And the headers must be included in the first line of the form since they will indicate the content of each field. You can add up to 3 telephone numbers in a list.



4.4.- Queues

In queues where the Agents that are going to manage one or more campaigns are assigned. The type of campaign is also defined.

To configure Queues, go to Campaigns/Queues:



The data to be configured are as follows:

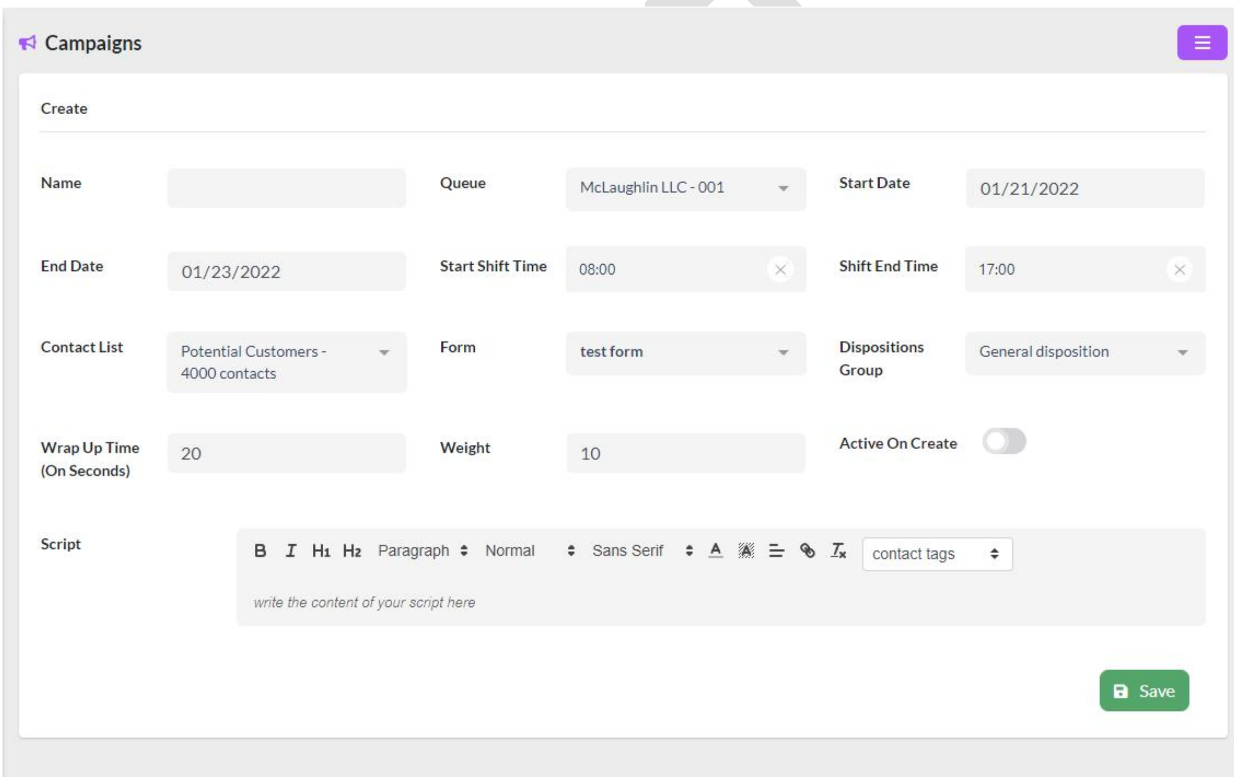
- **Queue Number**, number under which all the events in the queue will be logged.
- **Description**, brief description.
- **Dial Mode**
    - **Automatic Preview**, dialing displays the contact to the Agent and a few seconds later dials the number automatically.
    - **Manuel Preview**, the dialer displays the contact to the Agent and when the Agent is ready presses a button to place the call.
- **Members**, are the Agents that are going to belong to the queue. These agents should have had their extensions created previously in Users/Users.

4.5.- Campaigns

In this module is where the campaign is configured, it is very important that before configuring the campaign you have the following prepared:

- **Forms**, have created the form.
- **Disposition Groups**, have created at least one disposition group.
- **Contacts Lists**, you have imported at least one contact list.
- **Queues**, have created at least one queue with the Agents who will manage the campaign.

Once these 4 requirements are fulfilled, go to Campaigns/Campaigns and the following form will be displayed:



The data to be configured are as follows:

- **Name**, short name to identify the campaign.
- **Queue**, queue to which the campaign will be related. In this queue are the agents that belong to the campaign, as well as the type of marking.
- **Start Date**, campaign start day.
- **End Date**, end date of the campaign.
- **Start Shift Time**, campaign start time.
- **Shift End Time**, end time of the campaign.
- **Contact List**, list of contacts associated with the campaign.
- **Form**, form associated with the campaign.
- **Dispositions Group**, campaign partner disposition group.

- **Wrap Up Time**, time to be given to the Agent between calls.
- **Weight**, campaign weight, e.g., if an Agent manages two campaigns at the same time:
    - Campaign A, weight: 20
    - Campaign B, weight: 40

  It means that for every 20 contacts managed in campaign A, you must manage 40 in campaign B. This value is a percentage, i.e. you must manage twice as many contacts in the B campaign.
- **Active on Create**, by selecting this option, the campaign will be activated immediately.
- **Scrip**, very important. Here you configure the text that the Agent should transmit to the customer. It is also possible to use this script to help the agent to answer the customer during the call.

5.- Reports

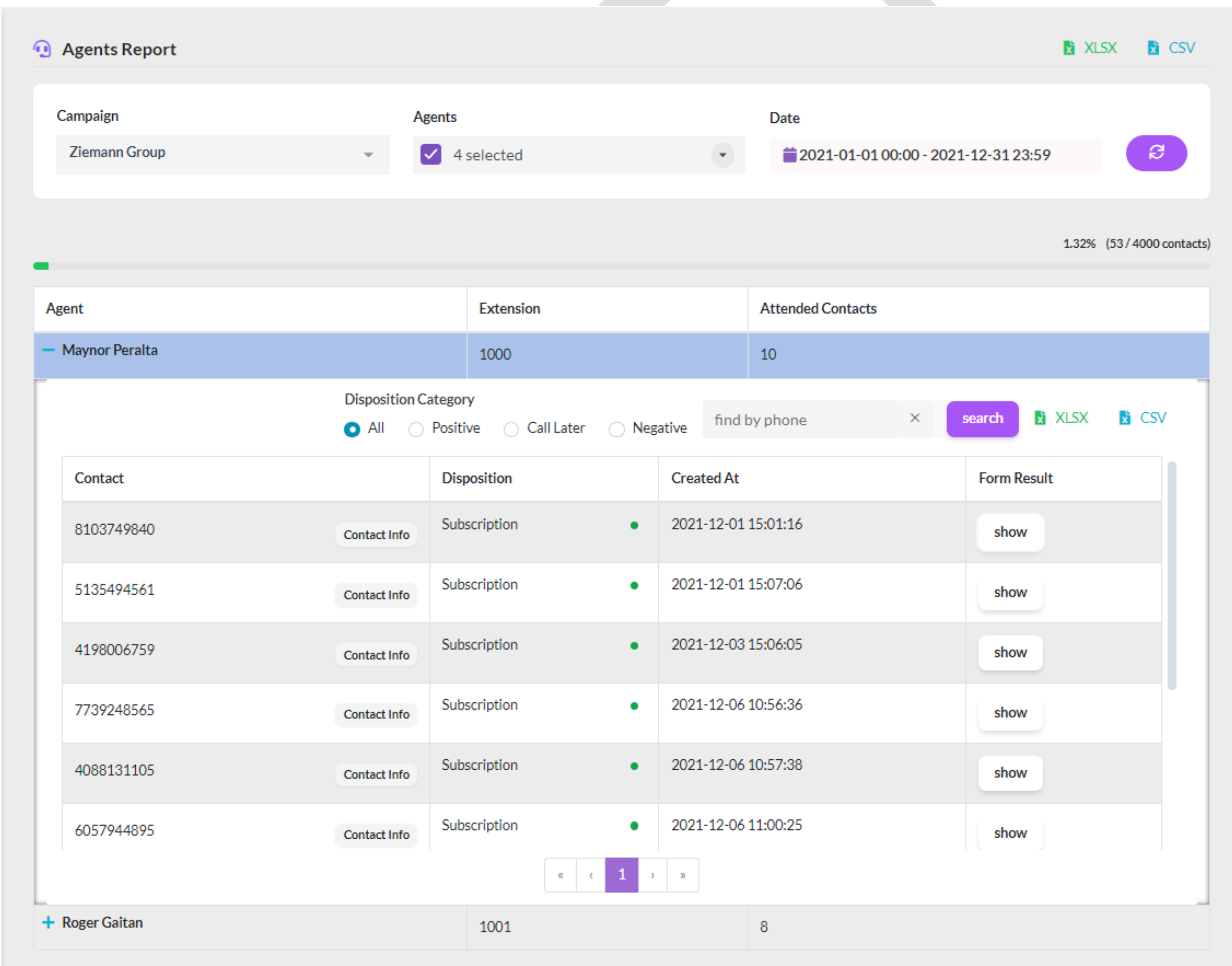
In the reporting module we will have the following options:

- **Agents Report**, activity report of each agent in a specific campaign.
- **Dispositions**, results type report for each campaign.
- **Call by Agent**, detailed calls by agent.

All reports can be exported to XLSX and CSV.

5.1.- Agents Report

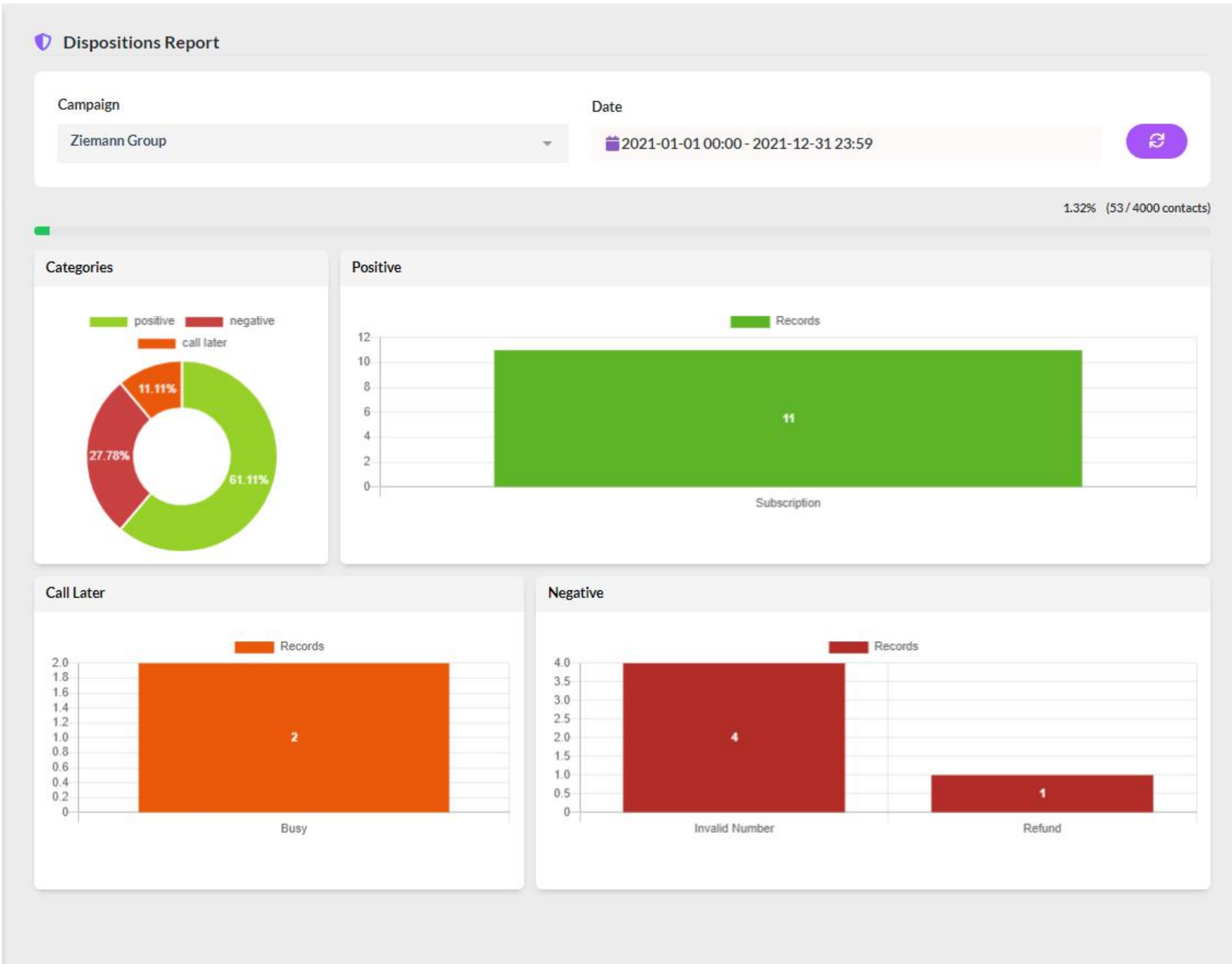
In reports by agent, we will obtain a detail of the management of the agents in each campaign. You will also be able to see the management of each contact.



Pressing Show displays the result of the contact management and pressing Contact Info displays the contact details.

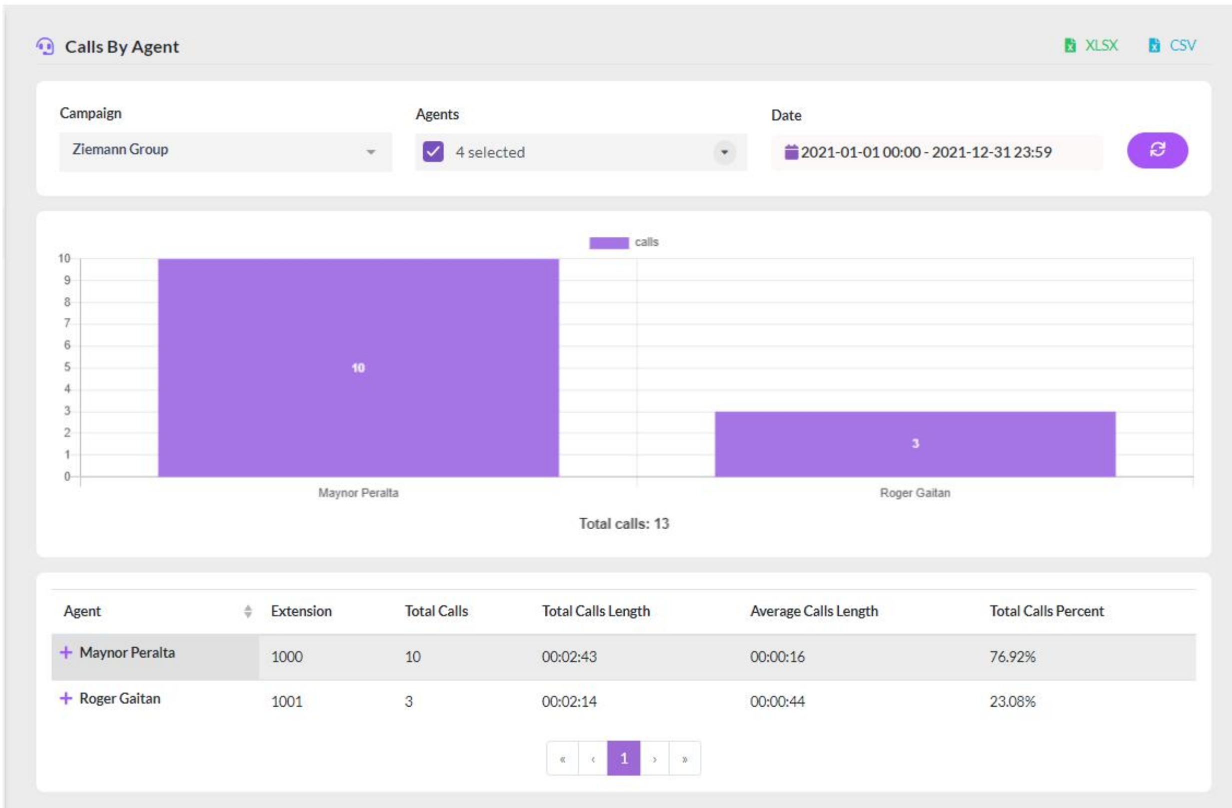
5.2.- Dispositions Reports

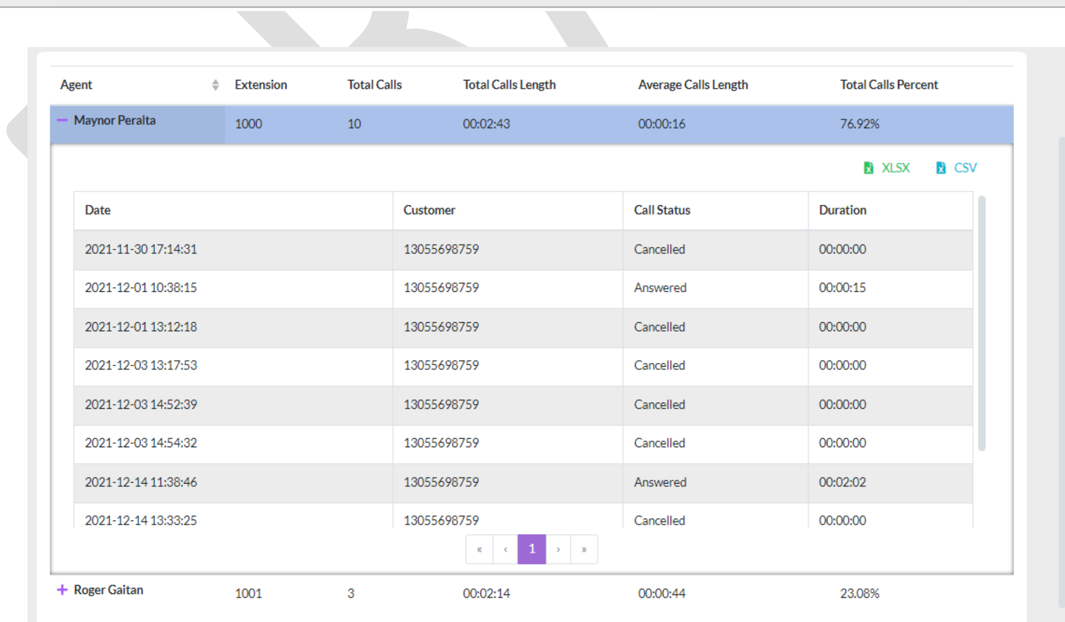
In this report we will see the overall results of each campaign organized by Disposition.



5.3.- Calls By Agent

This report shows a detail of calls by Agents in each Campaign.





6.- Users

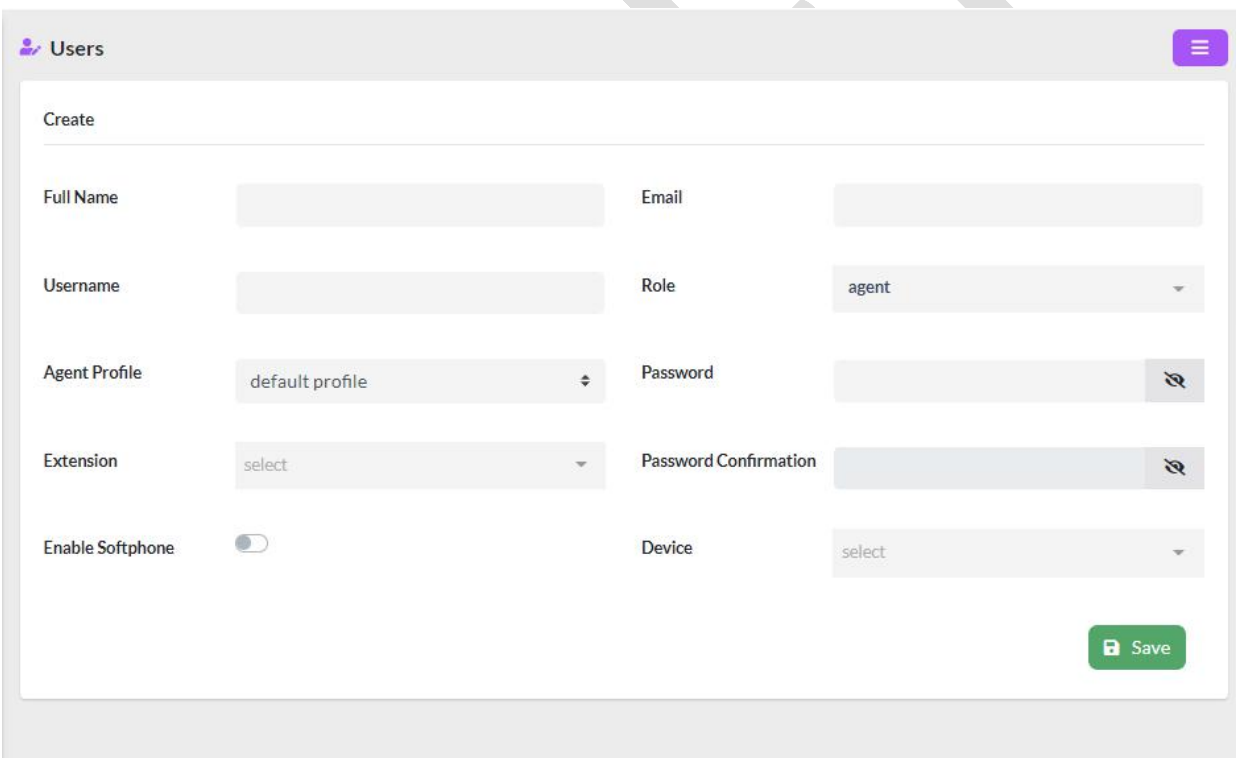
In users create and configure the following options.

- **User**, user creation and modification.
- **Agent Profile**, creation of causes of breaks for Users (Agents).
- **Roles**, creation of User permissions.
- **System Permissions**, creation of access to Agents, Campaigns and Queue. In order for a User not to be able to see other campaigns to which he/she is allowed to access.

6.1.- Users

In order to access the system, it is necessary to create users, there are two types of users:

- **Admin**, is for system administrators, it is not associated with any extension.
- **Agent**, is for Agents, it has to be associated to a device (Extension).



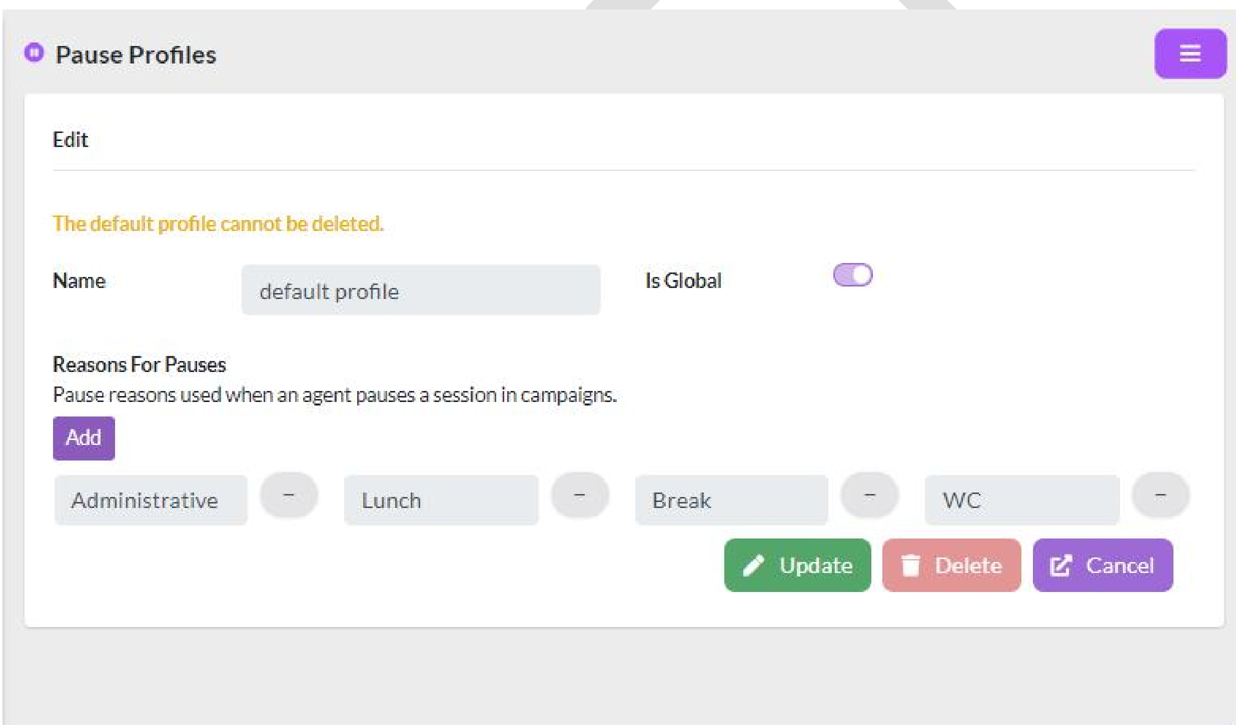
The data to consider when creating a user are as follows:

- **Full Name**, full name to identify the User.
- **Username**, short name to log in to the system.
- **Agent Profile**, type of pause profile if the user is an Agent.
- **Extension**, extension associated to the user. Necessary when dealing with an Agent.

- **Enable Softphone**, it is possible to have a WebRTC softphone integrated in the same Agent interface. When this option is enabled, it will appear. Please note that for this softphone to work you must have a VitXi license.
- **Email**, e-mail associated with the user.
- **Role**, by selecting "agent" this user becomes an Agent, any other role you choose is administrative.
- **Password**, password to login.
- **Password Confirmation**, confirmation of password to enter.
- **Device**, device to be associated with the Agent. It must be previously created in VitalPBX.

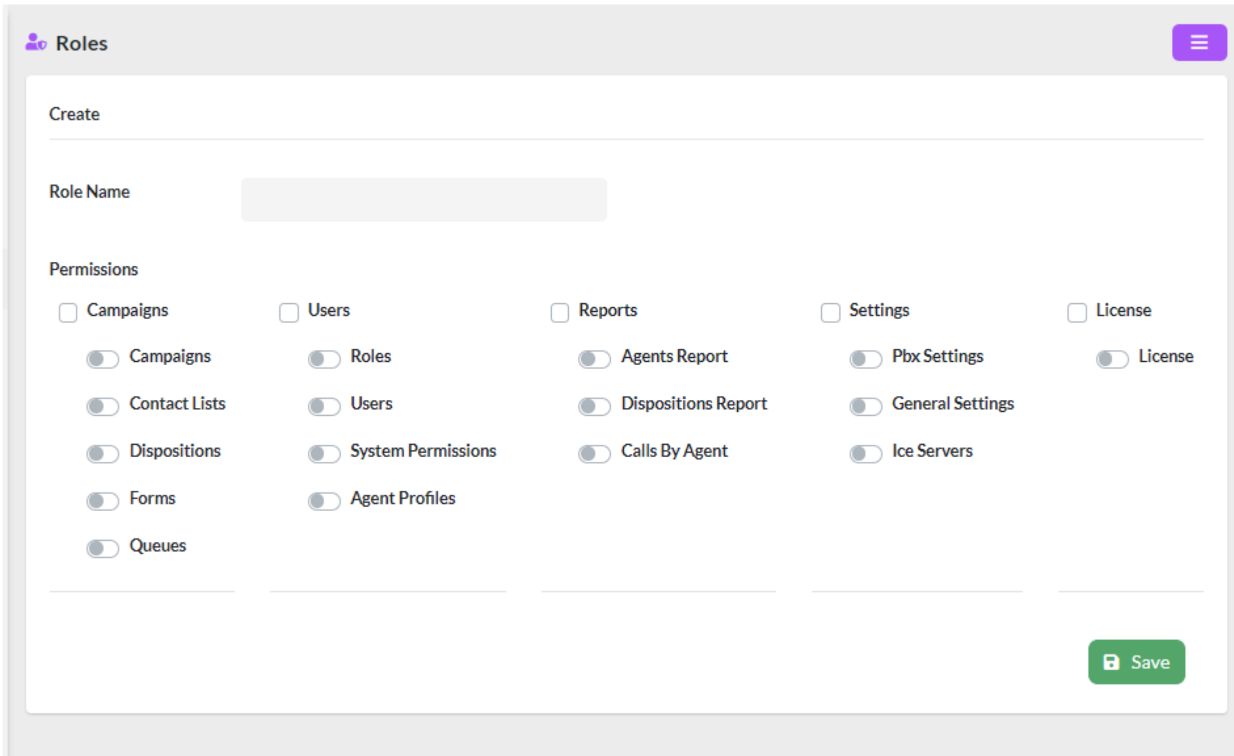
6.2.- Pause Profiles

Here we are going to create the profiles of the causes of pause of the Agents.



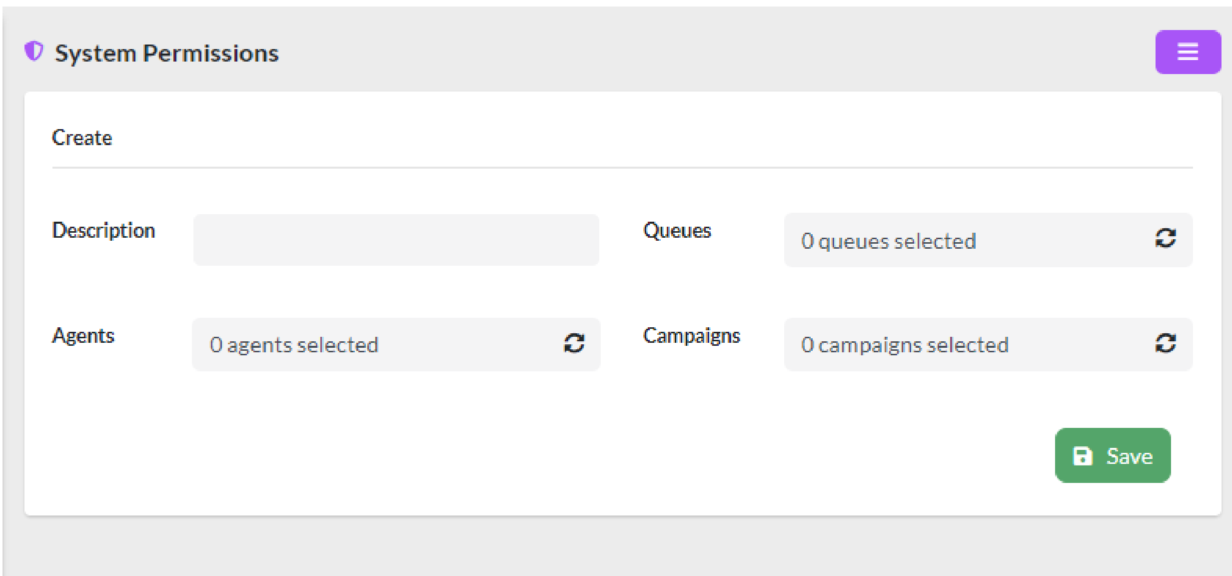
6.3.-Roles

In Roles we create the profiles that the system administrators are going to have.



6.4.- System Permission

On many occasions the system is used by several departments in a company and we do not want one area to see what the other area is doing. This is where you configure which queues, agents and campaign the administrative user will have access to.

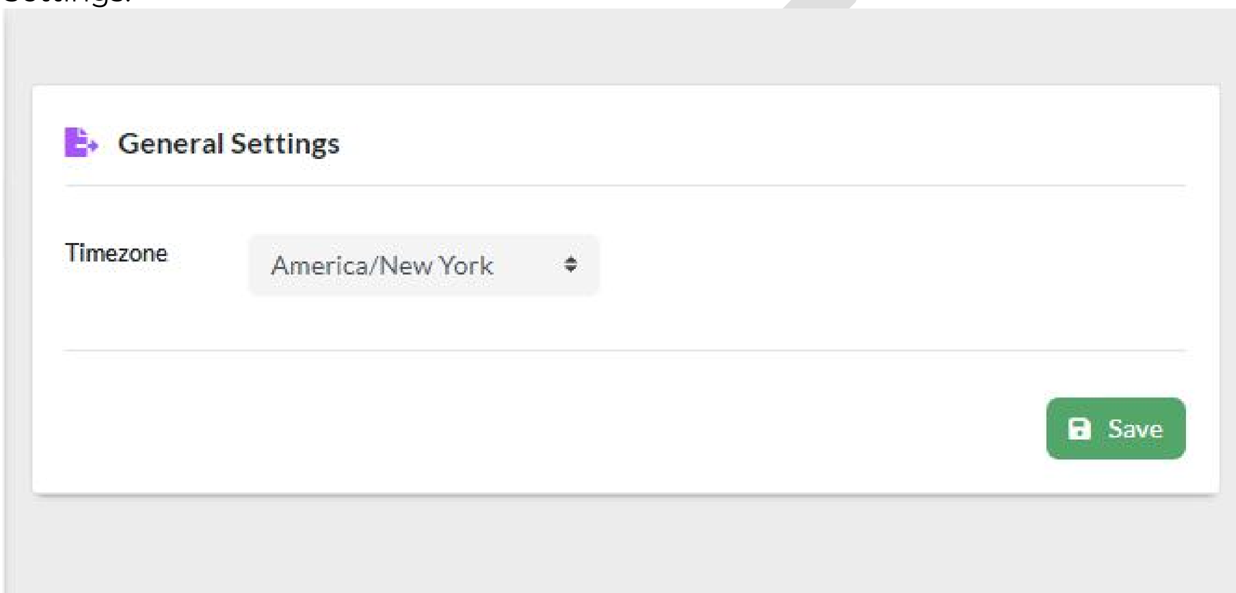


7.- Settings

In Settings we are going to configure the Time Zone, ice Server and PBX Settings.

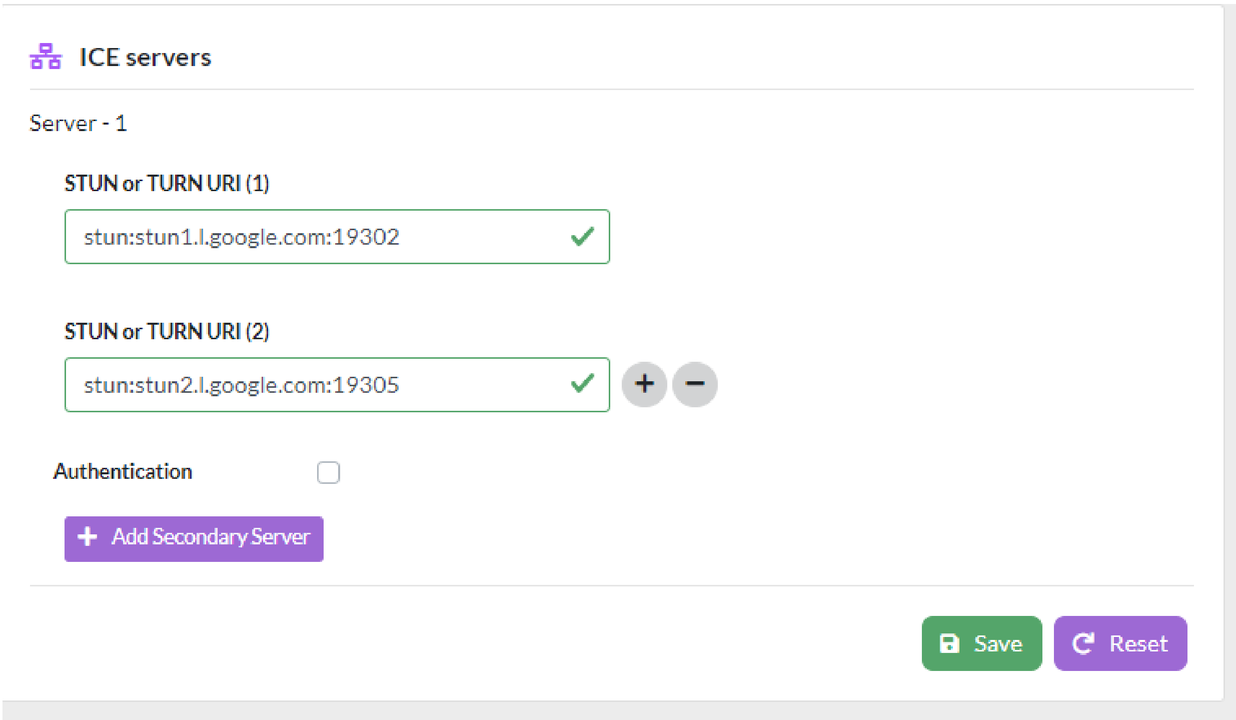
7.1.- General Settings

For the campaigns to run at the correct time and the reports to have the correct time it is necessary to configure the Time Zone. To do this go to Settings/General Settings.



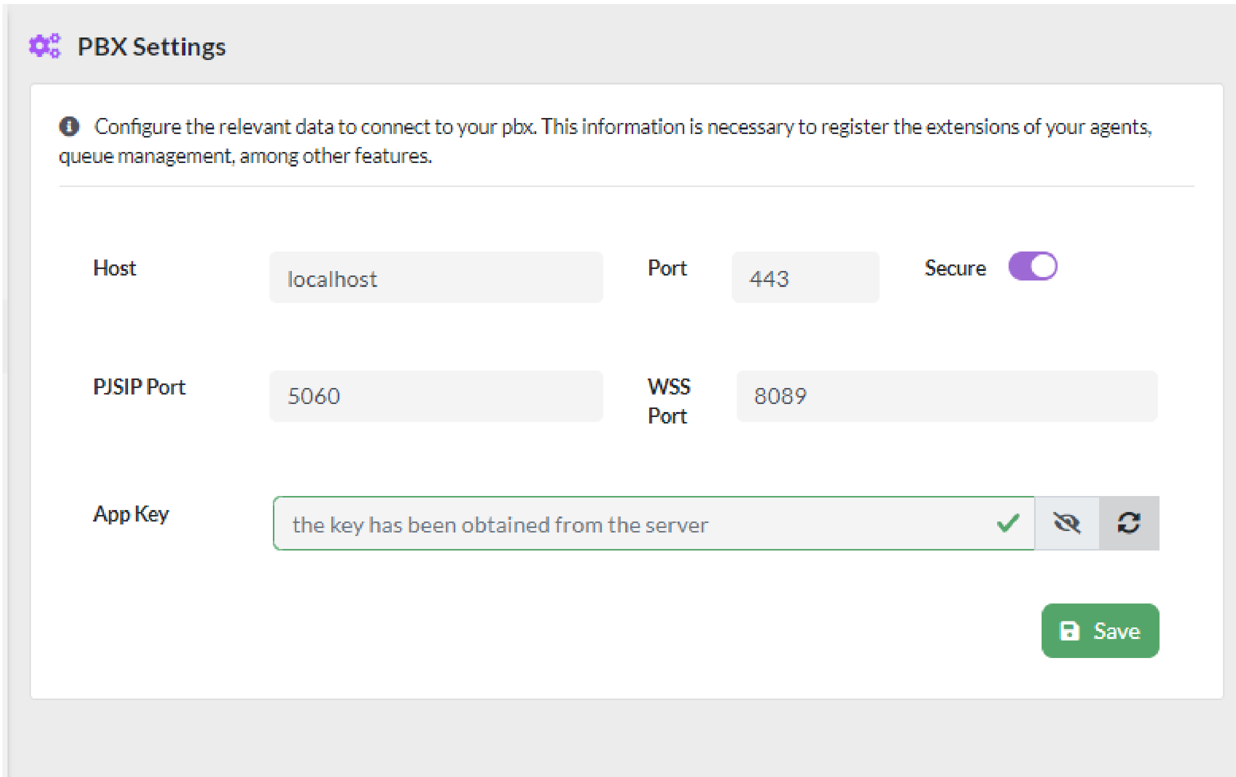
7.2.- ICE Servers

Sonata Dialer incorporates a Softphone integrated in the Agent console, this softphone uses WebRTC technology, for which it is advisable to configure ICE Servers. Google servers can be used. To perform this configuration, go to Settings/ICE Servers.



7.3.- PBX Settings

Although these parameters are configured when installing the App, it is possible to modify them later. To modify these initial settings, go to Settings/PBX Settings.

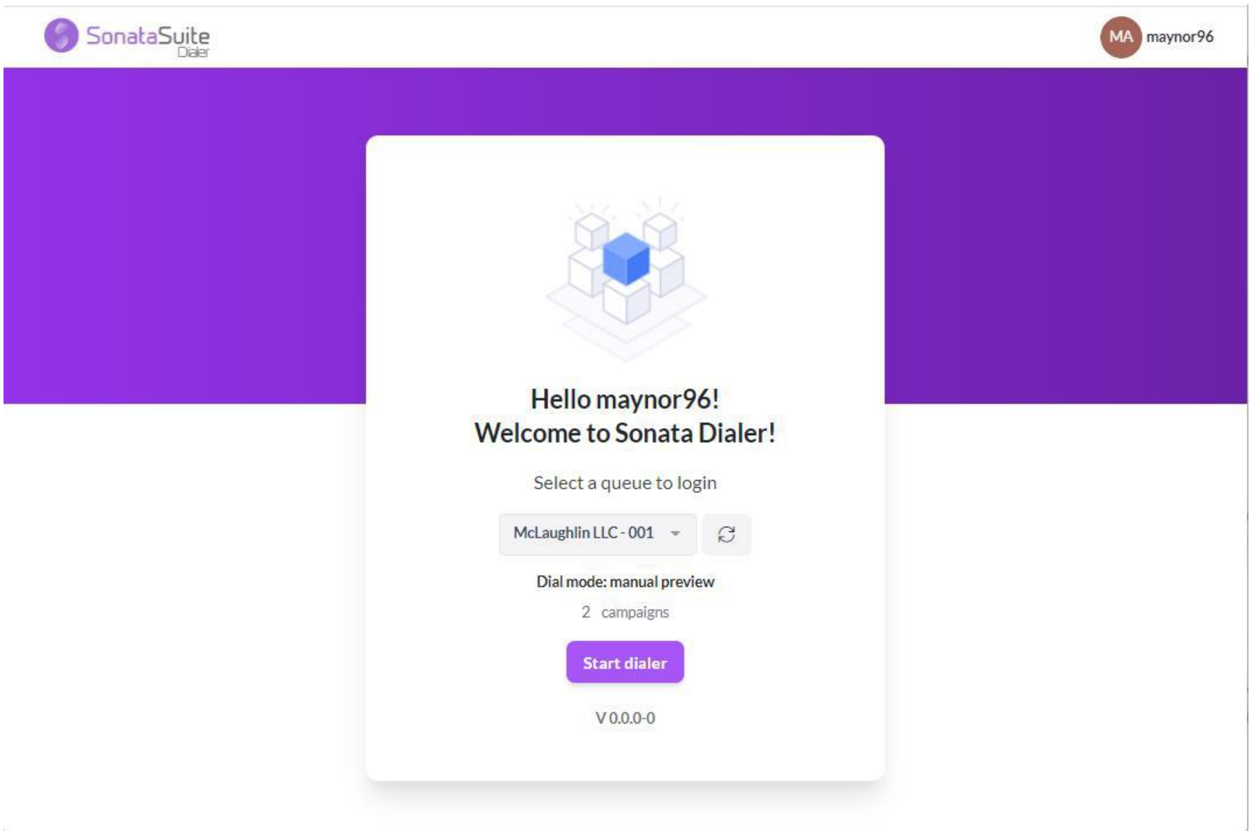


The parameters that can be configured are as follows:

- **Host**, server where VitalPBX is installed, if the dialer is installed on the same server as VitalPBX, you must select localhost.
- **Port**, configuration port, usually 443.
- **Secure**, secure connection. You must select.
- **PJSIP Port**, registration port for PJSIP extensions.
- **WSS Port**, port for WebRTC to work.
- **App Key**, when using the dialer on the same VitalPBX server it is not necessary to add an API Key.

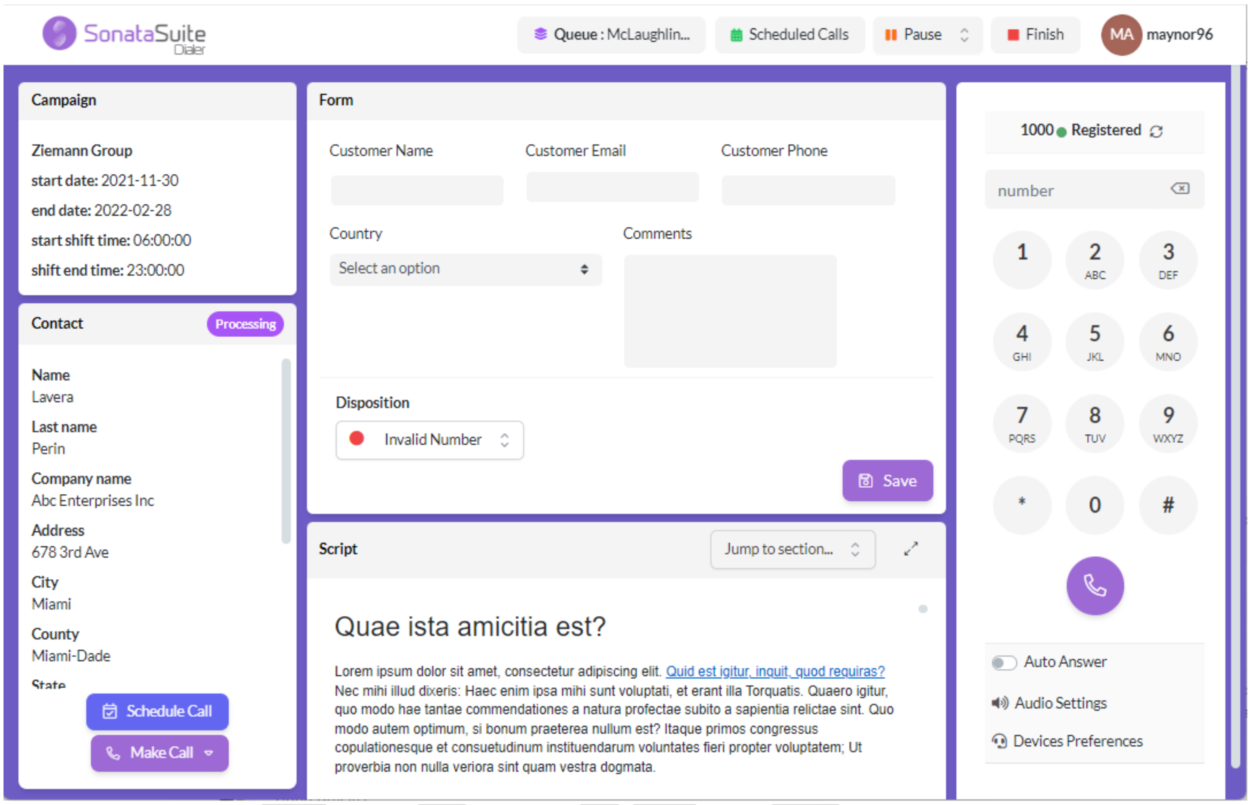
8.- Agent Console

When a user registers to the app as an agent, the following screen will be displayed.



Here you can select in which queue you want to register.

And after selecting the queue the following screen will appear where the calls will be initiated.



A.- Technical Specifications

Name	Sonata Dialer
Version	1.0.0-1
OS	Linux Centos 7 64 bits
Compatibility	VitalPBX 3.x
Database	MariaDB 10x or higher
Developed Language	PHP 7, HTML,
Necessary Memory	2 GB
Necessary HDD	500 MB
Packet Technology	RPM
Dependency	Already installed in VitalPBX 3.x