



MX Release 17 Feature Manual

Author: Zultys Technical Support Department

Description

This document describes the new features that are introduced with MX Release 17. MX Release 17 is supported on the MX-SE, MX-E, and MXvirtual products only

No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Zultys, Inc. Under the law, “reproducing” includes translating the document’s content into another language or format.

Information in this document is subject to change without notice. Every effort has been made to ensure that the information in this document is accurate. Zultys, Inc. is not responsible for printing or clerical errors. Any troubleshooting suggestions or suggestions for resolving common issues included in this document are recommendations made by Zultys Technical Support team and are not guaranteed to resolve every issue the reader may encounter.

1 Contents

2	<u>AUTO ATTENDANT LOCATION AWARENESS</u>	<u>5</u>
2.1	DESCRIPTION	5
2.2	OPERATION	5
2.3	CONDITIONS.....	5
3	<u>SECURITY SETTINGS – USER</u>	<u>6</u>
3.1	DESCRIPTION	6
3.2	ADMINISTRATION	6
3.2.1	CONFIGURE>USERS>EDIT USER	6
	CONDITIONS	8
4	<u>GUEST USER.....</u>	<u>9</u>
4.1	DESCRIPTION	9
4.2	ADMINISTRATION	9
4.2.1	GUEST PROFILES	9
4.2.2	CREATE NEW GUEST PROFILE:	10
4.2.3	PROFILE PARAMETERS.....	10
4.2.4	USER PROFILES	12
4.2.5	CALL GROUPS	13
4.2.6	DIAL PLAN	14
4.2.7	INCLUDE GUEST LINK INTO SCHEDULED CONFERENCE AUTOMATICALLY	15
4.2.8	GUEST OPERATION	16
4.3	CONDITIONS.....	16
5	<u>VIEW CONFERENCES</u>	<u>17</u>
5.1	DESCRIPTION	17
5.2	OPERATION	17
6	<u>PASSWORD RESET LINK.....</u>	<u>21</u>
6.1	DESCRIPTION	21
6.2	OPERATION	21
6.3	CONDITIONS.....	22

7	<u>RESET USER</u>	<u>23</u>
7.1	DESCRIPTION	23
7.2	OPERATION	23
7.3	CONDITIONS.....	24
8	<u>VIDEO SETTINGS</u>	<u>25</u>
8.1	DESCRIPTION	25
8.2	OPERATION	25
9	<u>MXOUTBOUND DIALER WEB BASED</u>	<u>27</u>
9.1	DESCRIPTION	27
9.2	OPERATION	27
9.2.1	CREATING A NEW CAMPAIGN INSTANCE.....	30
9.2.2	ADDING CONTACT RECORDS	31
9.2.3	MANUAL ADDITION.....	32
9.2.4	IMPORTING CONTACTS	34
9.2.5	MANAGING CONTACT RECORDS	35
9.2.6	MANUALLY STOPPING, RESCHEDULING, OR RESTARTING CALLS TO CONTACT RECORD	36
9.2.7	EDITING CONTACT RECORDS	36
9.2.8	DELETING CONTACT RECORDS.....	37
9.2.9	PAUSE/RESUME CAMPAIGN	38
9.2.10	EXPORT CAMPAIGN RESULTS.....	39
9.2.11	DELETING CAMPAIGN INSTANCE	39
9.3	CONDITIONS.....	40
10	<u>AGENT GROUP LOGIN INCREASE.....</u>	<u>41</u>
10.1	DESCRIPTION	41
10.2	OPERATION	41

Revision History

Date/Revision	Comments
June 2021 /Revision P1	Initial draft/internal review
July 2021 /Revision P2	Initial Early Access document
October 2021 /Revision 1	Initial GA document

2 Auto Attendant Location awareness

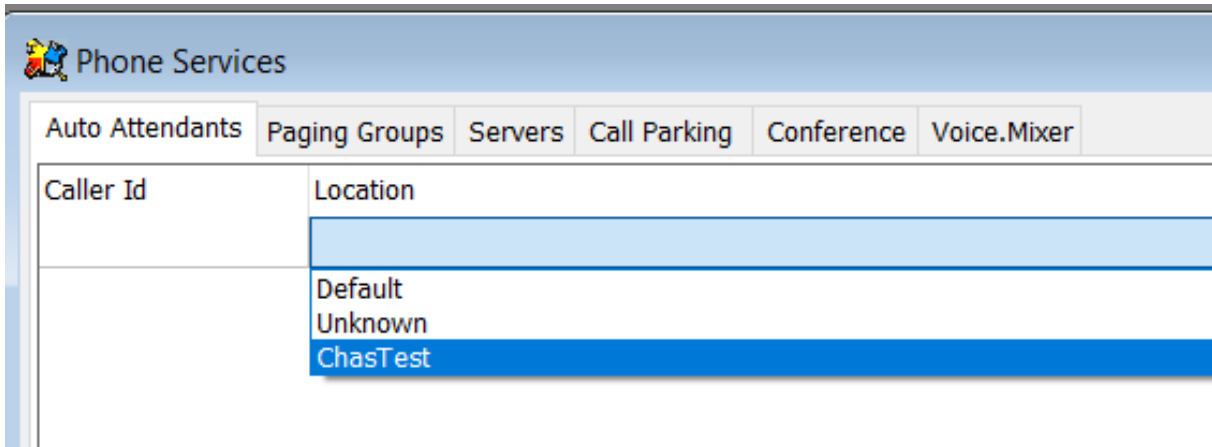
2.1 Description

This feature allows each individual auto attendant to have an associated MX location configured. By configuring a location for an auto attendant, AA schedules are now able to run in the local time for the configured location.

2.2 Operation

MX Administrator>Configure>Phone Services>Auto Attendants tab

- Select the desired location from the list.



Caller Id	Location
	Default
	Unknown
	ChasTest

- Click Apply to save.

2.3 Conditions

- If no location is configured for an auto attendant, the default location is utilized.

3 Security Settings – User

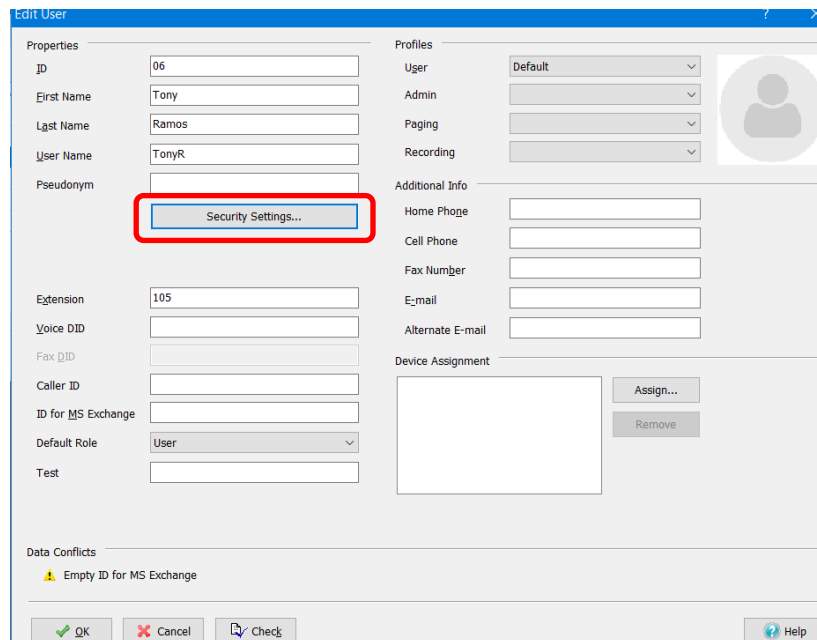
3.1 Description

The security settings area for users has been redesigned. Access to the settings has been consolidated and is now in a single area.

3.2 Administration

3.2.1 Configure>Users>Edit User

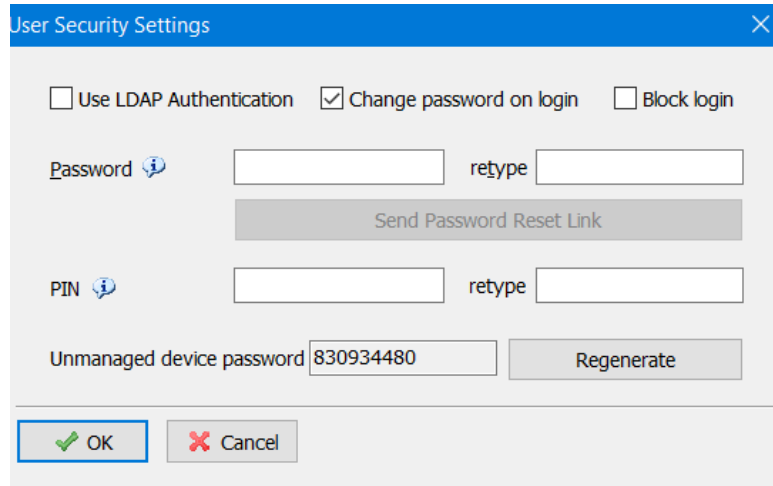
- Click the Security Settings button.



The screenshot shows the 'Edit User' window with the following sections:

- Properties:** ID (06), First Name (Tony), Last Name (Ramos), User Name (TonyR), Pseudonym (empty), Extension (105), Voice DID (empty), Fax DID (empty), Caller ID (empty), ID for MS Exchange (empty), Default Role (User), Test (empty).
- Profiles:** User (Default), Admin (empty), Paging (empty), Recording (empty).
- Additional Info:** Home Phone (empty), Cell Phone (empty), Fax Number (empty), E-mail (empty), Alternate E-mail (empty).
- Device Assignment:** Assign... button, Remove button.
- Data Conflicts:** Empty ID for MS Exchange (warning icon).
- Buttons:** OK, Cancel, Check, Help.

The 'Security Settings...' button is highlighted with a red rectangle.



The image shows a 'User Security Settings' dialog box with a blue title bar and a close button. It contains several configuration options: three checkboxes at the top ('Use LDAP Authentication', 'Change password on login', and 'Block login'), with 'Change password on login' checked; a 'Password' field with a help icon, a 'retype' field, and a 'Send Password Reset Link' button; a 'PIN' field with a help icon, a 'retype' field, and a 'Regenerate' button; and an 'Unmanaged device password' field showing '830934480' with a 'Regenerate' button. At the bottom are 'OK' and 'Cancel' buttons.

Use LDAP Authentication – This enables or disables the LDAP feature. If enabled, ZAC users will utilize their network credentials to log into ZAC. If disabled, the username/password from the MX will be utilized for log in purposes.

Change password on login – This will force the user to change their password after a login.

Block login – This will block the user from logging into the MX.

Password – This is where the users password can be configured. The password must meet certain criteria and you must retype the password before saving.

Send password reset link – This action will send the password reset link to the user so they may reset their password. The e-mail is sent to the e-mail address configured for the user.

PIN – This area is where the user PIN is set for voice mail access from TUI interfaces. The PIN must be a minimum of four characters and you must retype the PIN before saving.

Unmanaged device password – This feature provides a mechanism for the MX to generate SIP authentication passwords for unmanaged devices. This reduces vulnerability due to the usage of weak PINs.

Conditions

- User must have an e-mail assigned in MX Administrator for the reset password link to function.
Reset password link does not apply for users configured for LDAP login.

4 Guest User

4.1 Description

MX users have the ability to generate a link and send it to anybody outside of company. The person (Guest) receiving the link may have collaboration sessions including audio calls, video calls, group conference calls and chat sessions to the person who generated the link (host).

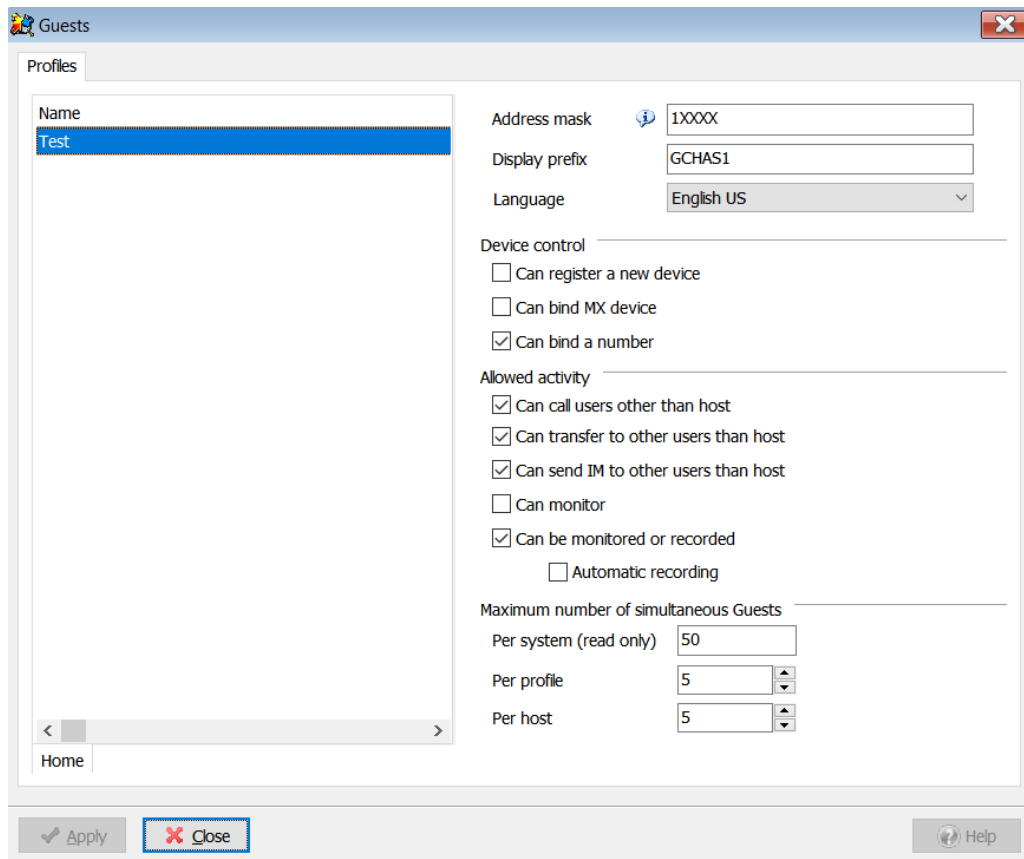
A chat group owner can generate link and invite anybody to group conversations including chat and voice/video conference.

Call group (ACD and ICC) Agents can send Guest invites that are initiated from the webchat function.

4.2 Administration

4.2.1 Guest Profiles

MX Administrator>Configure>Guests



Guests

Profiles

Name

Test

Address mask 1XXXX

Display prefix GCHAS1

Language English US

Device control

☐ Can register a new device

☐ Can bind MX device

☒ Can bind a number

Allowed activity

☒ Can call users other than host

☒ Can transfer to other users than host

☒ Can send IM to other users than host

☐ Can monitor

☒ Can be monitored or recorded

☐ Automatic recording

Maximum number of simultaneous Guests

Per system (read only) 50

Per profile 5

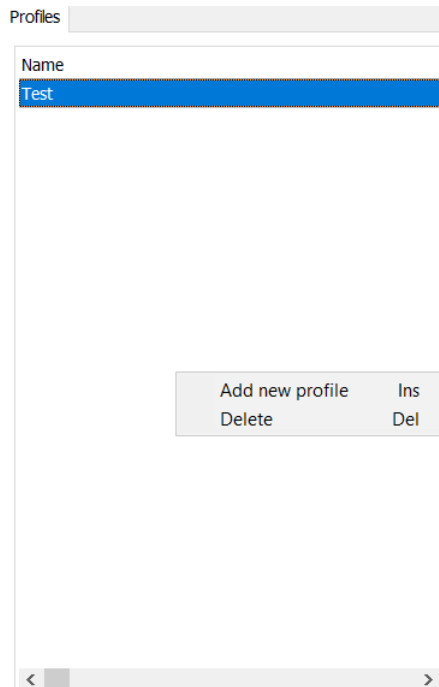
Per host 5

Home

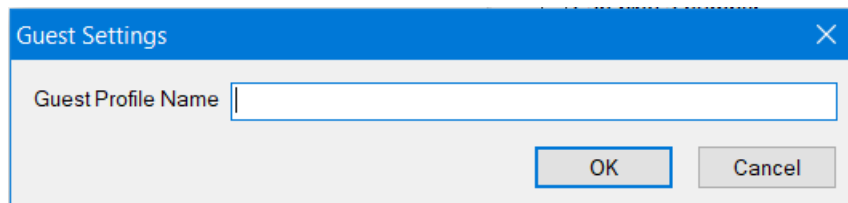
Apply Close Help

4.2.2 Create new Guest profile:

- Right click in the Profiles window or press the INS key.



- Enter the name of the guest profile and press OK.



4.2.3 Profile Parameters

Configure the desired parameters in the Guest profile.

Address mask – This field contains a string of digits, 'X' and 'N' characters. 'X' is replaced by digits '0'..'9' during address generation and 'N' by '1'..'9'.

The mask is used to generate Guest Address which is a number by which the guest can be reached. The number generation functions similar to Location Park ID generation.

Also, it will be seen as Caller ID for internal calls from the guest.

Display prefix – This field represents the CallerID of the guest. When Guest logs in, Guest provides some name, this name with configured prefix added will be shown as Caller Name for internal calls.

Language – Select the desired language to utilize.

Device Control

Can register a new device – Allow guest to register an unmanaged device under the guest name (for softphone usage).

***Note:** In order for guests to participate in conferences or call the host, this setting must be enabled.*

Can bind MX device [FUTURE USE] – Allow guest to bind to an MX device

Can bind a number [FUTURE USE] – Allow guest to bind to an external number

Allowed activity [THIS SECTION IS FOR FUTURE USE]

Can call user other than host – This configures if guest users are allowed to call MX users other than the host in the MX system.

Can transfer to other users than host – This configures if guest users are allowed to transfer calls to MX users other than the host in the MX system.

Can send IM to other users than host – This configures if guest users are allowed to send chat messages to MX users other than the host in the MX system.

Can monitor – This configures if guest users are allowed to monitor MX users in the MX system.

Can be monitored – This configures if guest users are allowed to be monitored by the host in the MX system.

Automatic recording – This configures if guest user calls are automatically recorded in the MX system.

Maximum number of simultaneous Guests

Per system – fixed at 50

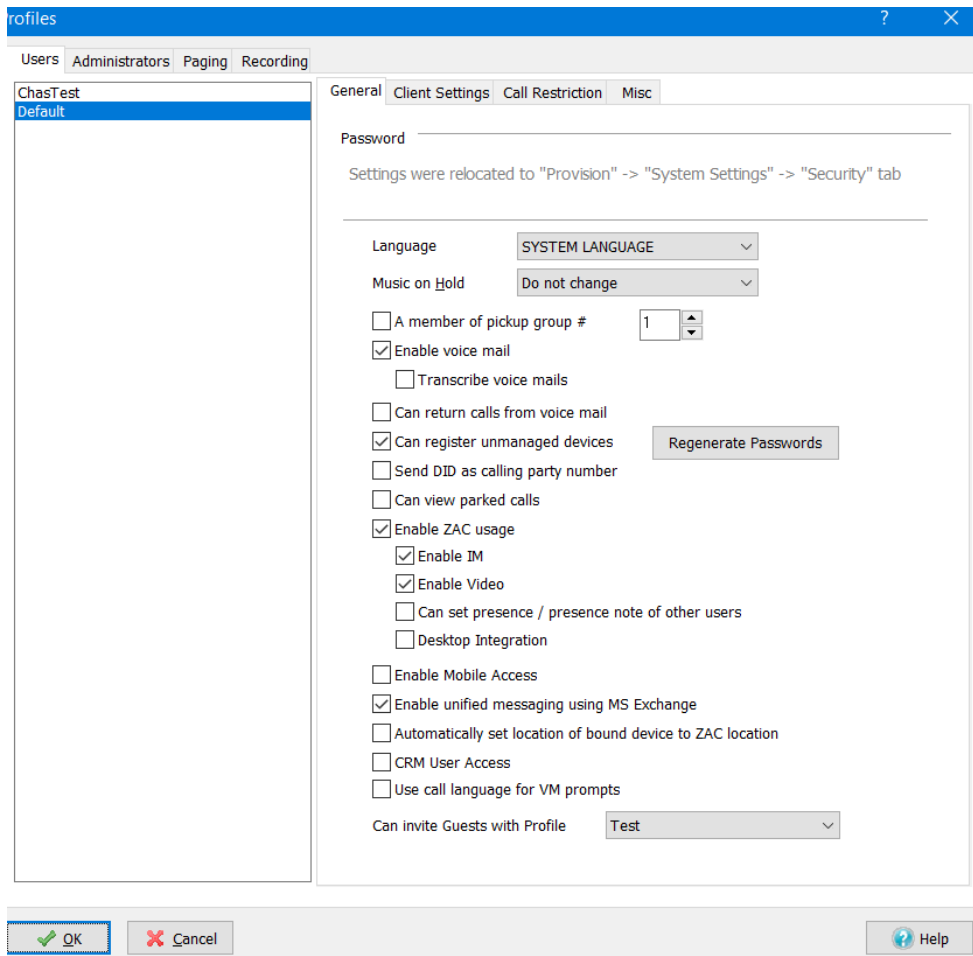
Per profile – Enter the maximum number of guests that this profile can support.

Per host – Enter the maximum number of guests that a host configured with this guest profile can support.

4.2.4 User Profiles

Once a guest profile is created, you can then assign this profile to user profiles that enable MX users with that profile to invite guests.

MX Administrator>Configure>Users>User Profiles



profiles

Users Administrators Paging Recording

ChasTest
Default

General Client Settings Call Restriction Misc

Password

Settings were relocated to "Provision" -> "System Settings" -> "Security" tab

Language SYSTEM LANGUAGE

Music on Hold Do not change

☐ A member of pickup group # 1

☒ Enable voice mail

☐ Transcribe voice mails

☐ Can return calls from voice mail

☒ Can register unmanaged devices

☐ Send DID as calling party number

☐ Can view parked calls

☒ Enable ZAC usage

☒ Enable IM

☒ Enable Video

☐ Can set presence / presence note of other users

☐ Desktop Integration

☐ Enable Mobile Access

☒ Enable unified messaging using MS Exchange

☐ Automatically set location of bound device to ZAC location

☐ CRM User Access

☐ Use call language for VM prompts

Can invite Guests with Profile Test

Regenerate Passwords

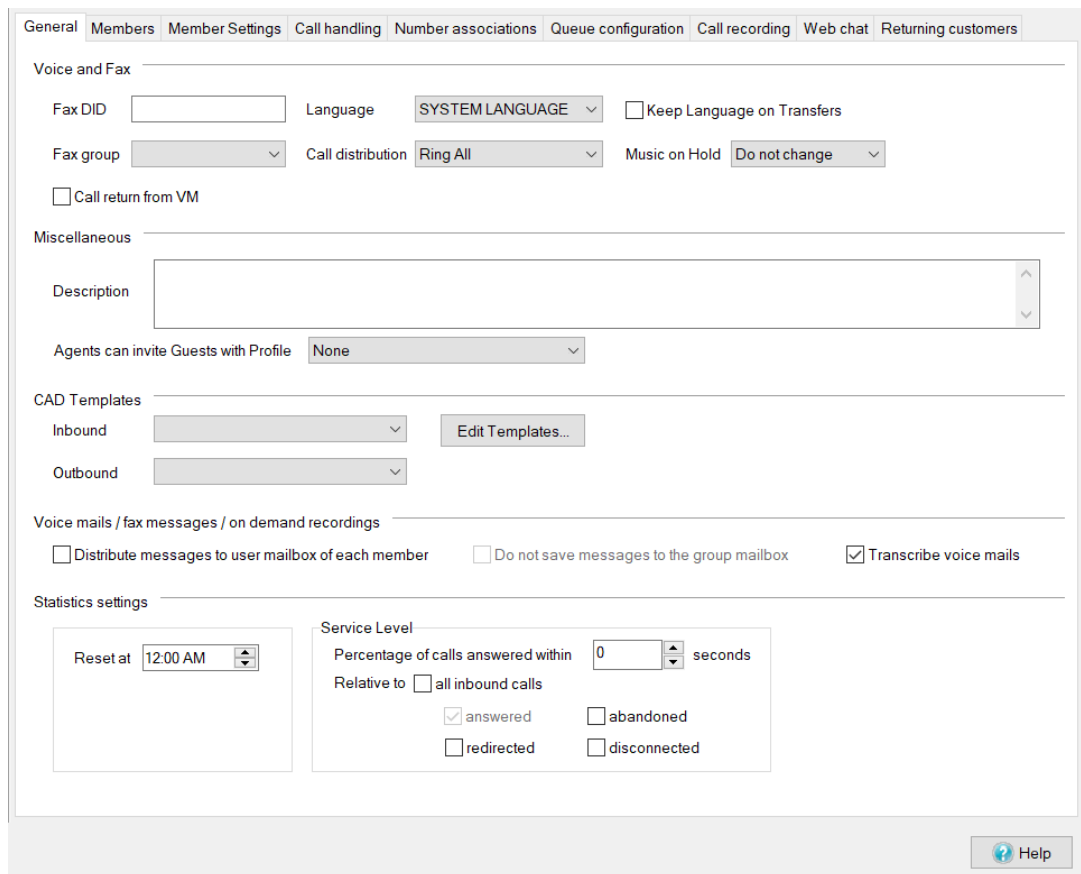
OK Cancel Help

- Can invite guests with profile – select the desired guest profile from the list click Ok.
- Assign this User profile to users who want the ability to send external links both as a user and as a group chat owner.

4.2.5 Call groups

ACD and ICC call group agents may also send web links to external users. To configure this for call group agents:

MX Administrator>Operator and Call Groups>[call group]>General tab



The screenshot shows the 'General' tab of the MX Administrator interface for configuring a call group. The tabs at the top are: General, Members, Member Settings, Call handling, Number associations, Queue configuration, Call recording, Web chat, and Returning customers.

Voice and Fax

- Fax DID: [text box]
- Language: [SYSTEM LANGUAGE v]
- ☐ Keep Language on Transfers
- Fax group: [v]
- Call distribution: [Ring All v]
- Music on Hold: [Do not change v]
- ☐ Call return from VM

Miscellaneous

- Description: [text box]
- Agents can invite Guests with Profile: [None v]

CAD Templates

- Inbound: [v] [Edit Templates...]
- Outbound: [v]

Voice mails / fax messages / on demand recordings

- ☐ Distribute messages to user mailbox of each member
- ☐ Do not save messages to the group mailbox
- ☒ Transcribe voice mails

Statistics settings

- Reset at: [12:00 AM v]
- Service Level:
 - Percentage of calls answered within: [0 v] seconds
 - Relative to: ☐ all inbound calls
 - ☒ answered ☐ abandoned
 - ☐ redirected ☐ disconnected

A Help icon is located at the bottom right of the form.

- Select the desired guest profile for the call group:

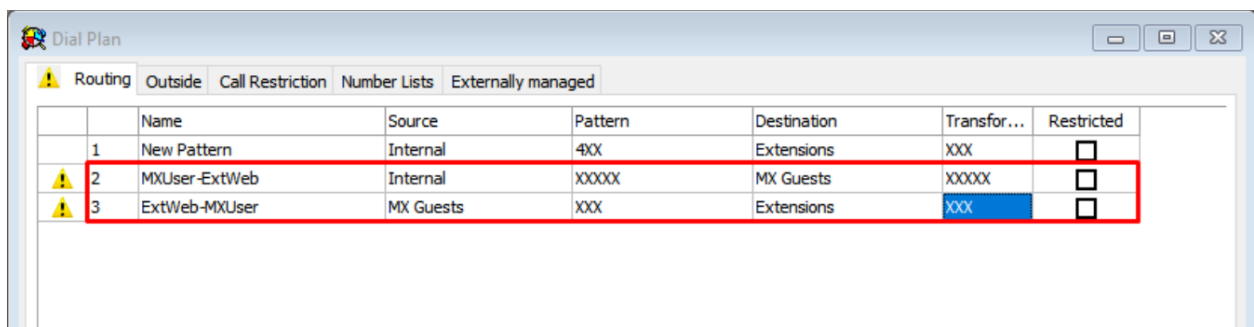
Agents can invite Guests with Profile **Test** [v]

- Click Apply to save.

4.2.6 Dial plan

If you want external guests to be able to call the host, the MX dial plan will need to be configured. MX Guests addresses represent a new address space which is different from DIDs and Extensions. A new entry "MX Guests" has been added to the dial plan. The dial plan configuration for MX guest user calls is customer specific as are any other dial plan. Configuration of routing for guests is similar to the dial plan configuration for DID routing. MX guest users can be configured in the both destination and source fields.

MX Administrator>



	Name	Source	Pattern	Destination	Transfor...	Restricted
1	New Pattern	Internal	4XX	Extensions	XXX	<input type="checkbox"/>
2	MXUser-ExtWeb	Internal	XXXXX	MX Guests	XXXXX	<input type="checkbox"/>
3	ExtWeb-MXUser	MX Guests	XXX	Extensions	XXX	<input type="checkbox"/>

In this example:

MXUser-ExtWeb represents the dial plan entry for MX users calling guest users.

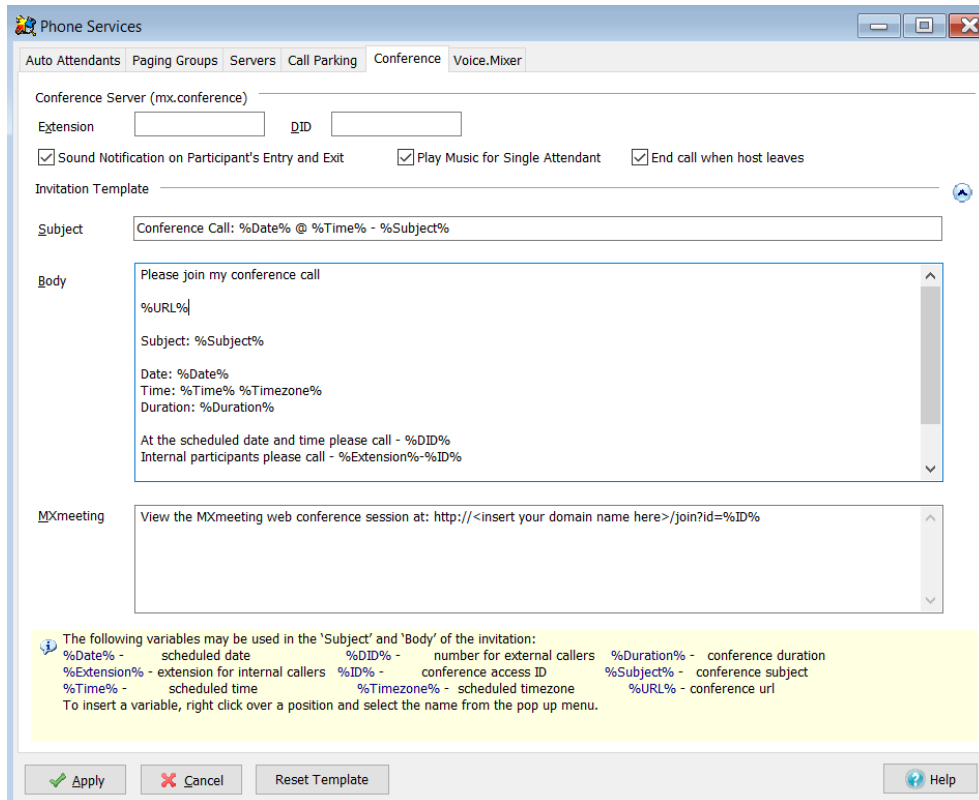
ExtWeb-MXUser represents the dial plan entry for guests calling MX users.

Note: The number of digits in the pattern for MX users calling guests (MX User → ExtWeb) should correspond to the value set in Guest profile | Address mask

example: If MX Address mask = 1XXXX, MXUser → ExtWeb is configured as XXXXX pattern.

4.2.7 Include Guest link into scheduled conference automatically

You may include the Guest link into an e-mail invitation you create for a scheduled conference. This is configured in Configure>Phone Services>Conference tab. The Invitation template is modified to include the %URL% variable that will include the Guest external link associate with the conference into the invitation.



Phone Services

Auto Attendants | Paging Groups | Servers | Call Parking | **Conference** | Voice Mixer

Conference Server (mx.conference)

Extension DID

☒ Sound Notification on Participant's Entry and Exit ☒ Play Music for Single Attendant ☒ End call when host leaves

Invitation Template

Subject: Conference Call: %Date% @ %Time% - %Subject%

Body

Please join my conference call

%URL%

Subject: %Subject%

Date: %Date%

Time: %Time% %Timezone%

Duration: %Duration%

At the scheduled date and time please call - %DID%

Internal participants please call - %Extension%- %ID%

MXmeeting

View the MXmeeting web conference session at: <http://<insert your domain name here>/join?id=%ID%>

The following variables may be used in the 'Subject' and 'Body' of the invitation:

%Date%	- scheduled date	%DID%	- number for external callers	%Duration%	- conference duration
%Extension%	- extension for internal callers	%ID%	- conference access ID	%Subject%	- conference subject
%Time%	- scheduled time	%Timezone%	- scheduled timezone	%URL%	- conference url

To insert a variable, right click over a position and select the name from the pop up menu.

Apply Cancel Reset Template Help

Make sure to include the variable in the Body portion of the template.

4.2.8 Guest Operation

Guest Operation is described in the Zultys Advanced Communicator User manual and the WebZAC User manual.

4.3 Conditions

- You only need to configure the dial plan if calling between host/guests is required by the application.
- Guest user audio calling will consume a session license. This should be accounted for when implementing the guest user feature.
- Group and conference links that are sent will be maintained in the event of an MX reboot. Personal links sent by users are NOT maintained in the event of an MX reboot.
- Only Users and ACD Groups can be Hosts and have Guest Profiles linked and only one Guest Profile can be linked by Host.
- If ACD/ICC supports webchat but does not have a Guest Profile configured, the default "Web Chat" profile will be utilized which may limit options that the external user has.
- It is not possible to "unset" a Guest Profile for the Call Group, if there is no Profile then Default Chat Profile is used. Default chat profile is always displayed in the still unless a guest profile is configured for the group.

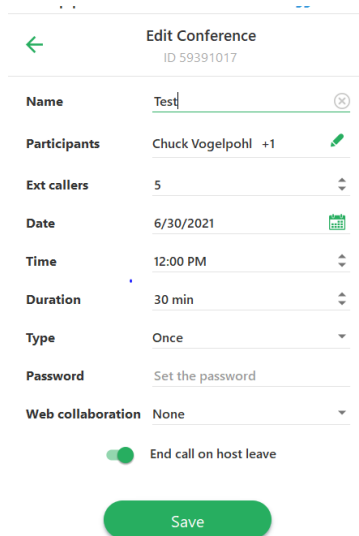
5 View Conferences

5.1 Description









This feature allows an MX Administrator to view, edit, and delete scheduled conferences that have been setup by MX users.

5.2 Operation

- A user creates a scheduled conference in ZAC or WebZAC:



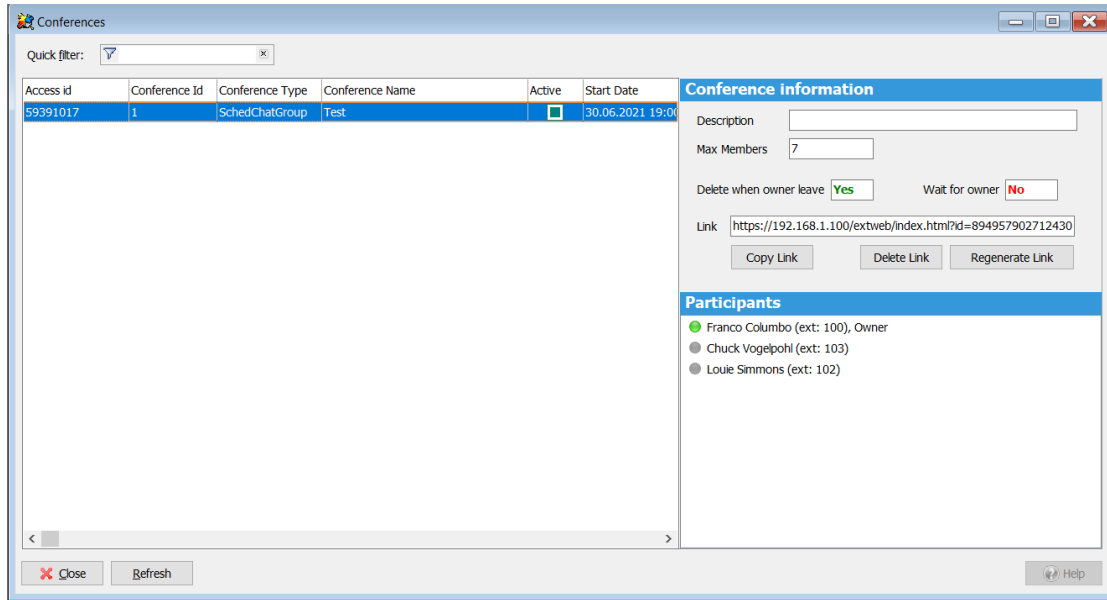
Edit Conference
ID 59391017

Name	Test	
Participants	Chuck Vogelpohl +1	
Ext callers	5	
Date	6/30/2021	
Time	12:00 PM	
Duration	30 min	
Type	Once	
Password	Set the password	
Web collaboration	None	

☒ End call on host leave

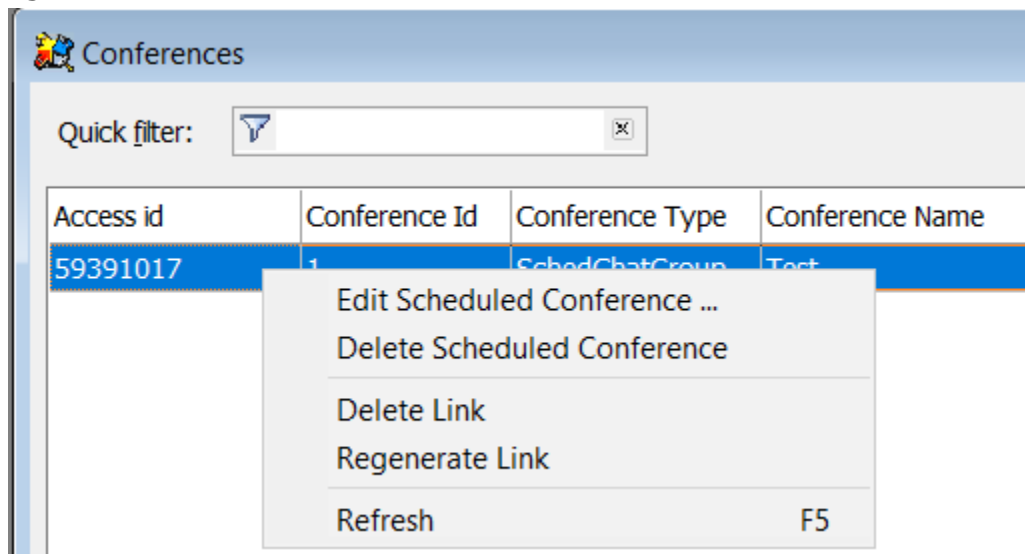
Save

- Once the conference is created by the user, navigate to:
MX administrator>View>Conferences

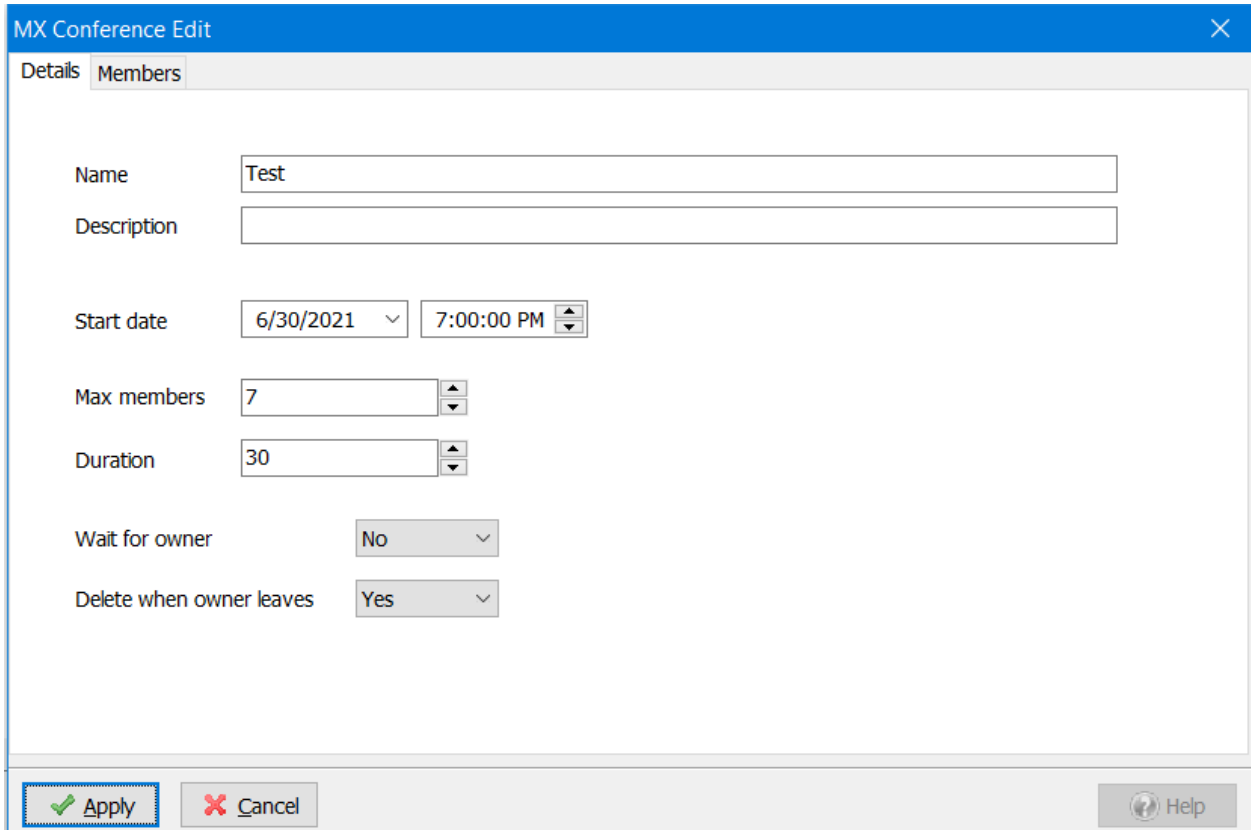


A list of all scheduled conferences will appear.

- Right click on the desired conference to display options:



- Edit scheduled conference option:

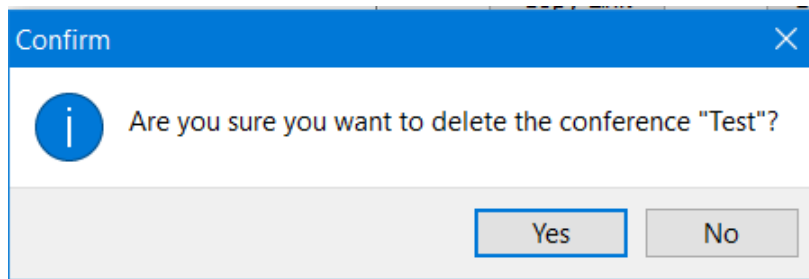


The image shows a software window titled "MX Conference Edit" with a close button (X) in the top right corner. It has two tabs: "Details" and "Members", with "Details" currently selected. The form contains the following fields and controls:

- Name:** A text input field containing the word "Test".
- Description:** An empty text input field.
- Start date:** A date picker set to "6/30/2021" and a time picker set to "7:00:00 PM".
- Max members:** A numeric spinner box set to "7".
- Duration:** A numeric spinner box set to "30".
- Wait for owner:** A dropdown menu set to "No".
- Delete when owner leaves:** A dropdown menu set to "Yes".

At the bottom of the window, there are three buttons: "Apply" (with a green checkmark icon), "Cancel" (with a red X icon), and "Help" (with a question mark icon).

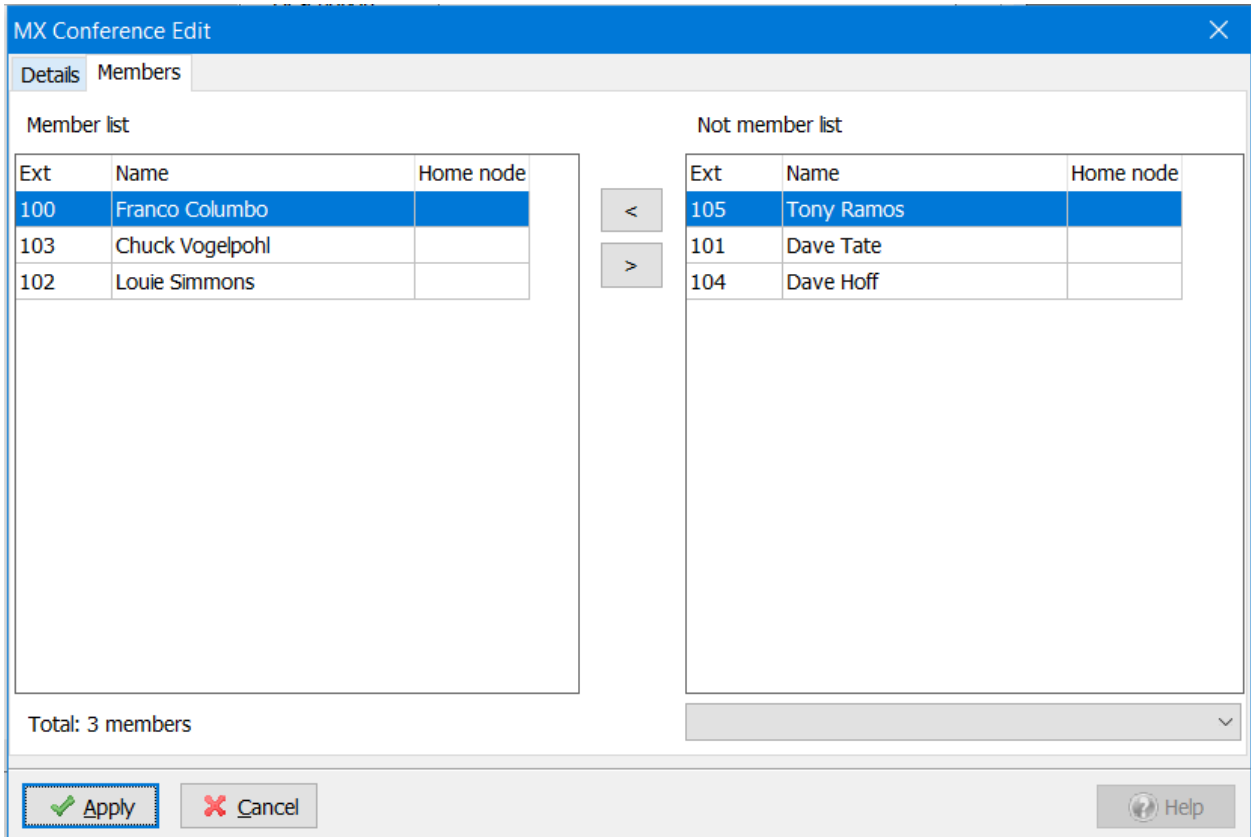
- Delete a conference. Select this item to delete the conference from the system. Click Yes at the confirmation prompt to proceed.



The image shows a "Confirm" dialog box with a blue title bar and a close button (X). It contains an information icon (i) and the text: "Are you sure you want to delete the conference 'Test'?". At the bottom, there are two buttons: "Yes" and "No".

- Copy Link. Select this item to copy the web link to the clipboard.
- Delete Link. Select this option to remove the associated web link from the conference.
- Regenerate Link. Select this option to regenerate the web link from the associated conference.

- Members tab. You may add/remove members from the conference. Select the desired member from the a list and use the < > buttons to add/remove members.



The image shows a screenshot of the 'MX Conference Edit' dialog box. It has a blue title bar with a close button. Below the title bar are two tabs: 'Details' and 'Members'. The 'Members' tab is selected. The dialog is divided into two main sections: 'Member list' on the left and 'Not member list' on the right. Each section contains a table with three columns: 'Ext', 'Name', and 'Home node'. In the 'Member list', three members are listed: Franco Columbo (Ext 100), Chuck Vogelpohl (Ext 103), and Louie Simmons (Ext 102). In the 'Not member list', three members are listed: Tony Ramos (Ext 105), Dave Tate (Ext 101), and Dave Hoff (Ext 104). Between the two tables are two buttons: a left arrow (<) and a right arrow (>). Below the 'Member list' table, it says 'Total: 3 members'. At the bottom of the dialog are three buttons: 'Apply' (with a green checkmark icon), 'Cancel' (with a red X icon), and 'Help' (with a question mark icon).

Ext	Name	Home node
100	Franco Columbo	
103	Chuck Vogelpohl	
102	Louie Simmons	

Ext	Name	Home node
105	Tony Ramos	
101	Dave Tate	
104	Dave Hoff	

Total: 3 members

Apply Cancel Help

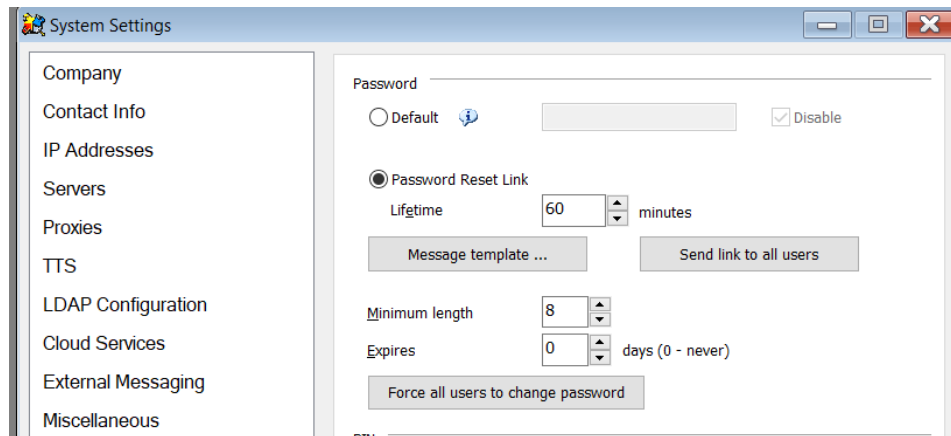
6 Password Reset Link

6.1 Description

This feature provides a method for MX administrators to send a password reset link to one or all MX users so they may reconfigure their user password.

6.2 Operation


MX Administrator > Provision > System Settings > Security



System Settings

- Company
- Contact Info
- IP Addresses
- Servers
- Proxies
- TTS
- LDAP Configuration
- Cloud Services
- External Messaging
- Miscellaneous

Password

☐ Default  ☐ Disable

☒ Password Reset Link

Lifetime: 60 minutes

Message template ...

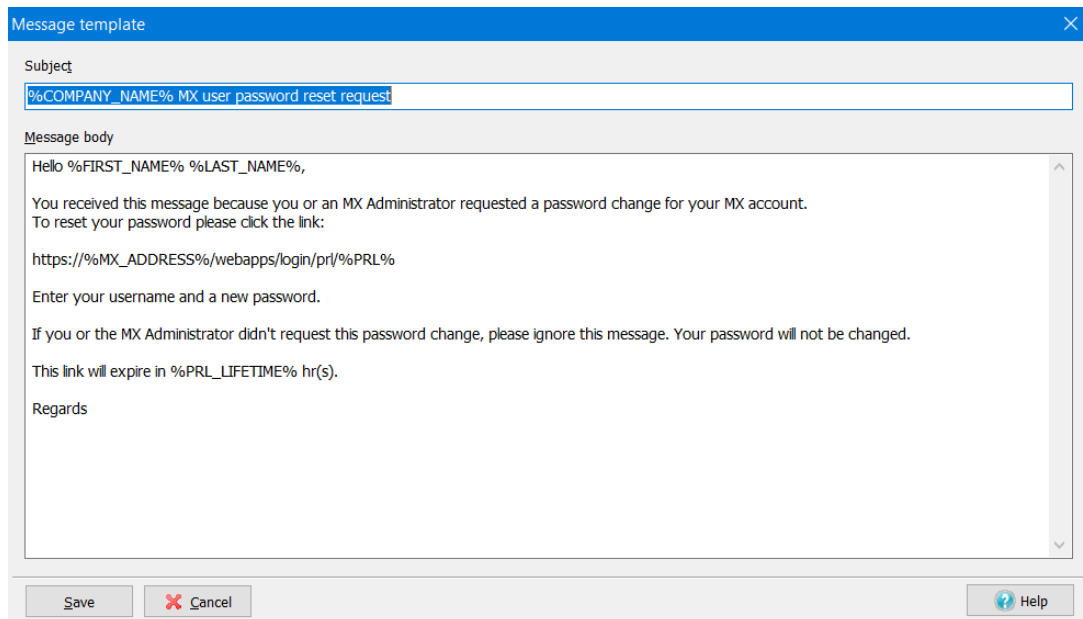
Send link to all users

Minimum length: 8

Expires: 0 days (0 - never)

Force all users to change password

- Enable the password Reset Link
- Set the link expiration time (lifetime) max value is 998.
- Click the Message template to edit the e-mail template.



Message template

Subject

%COMPANY_NAME% MX user password reset request

Message body

Hello %FIRST_NAME% %LAST_NAME%,

You received this message because you or an MX Administrator requested a password change for your MX account.
To reset your password please click the link:

https://%MX_ADDRESS%/webapps/login/pr/%PRL%

Enter your username and a new password.

If you or the MX Administrator didn't request this password change, please ignore this message. Your password will not be changed.

This link will expire in %PRL_LIFETIME% hr(s).

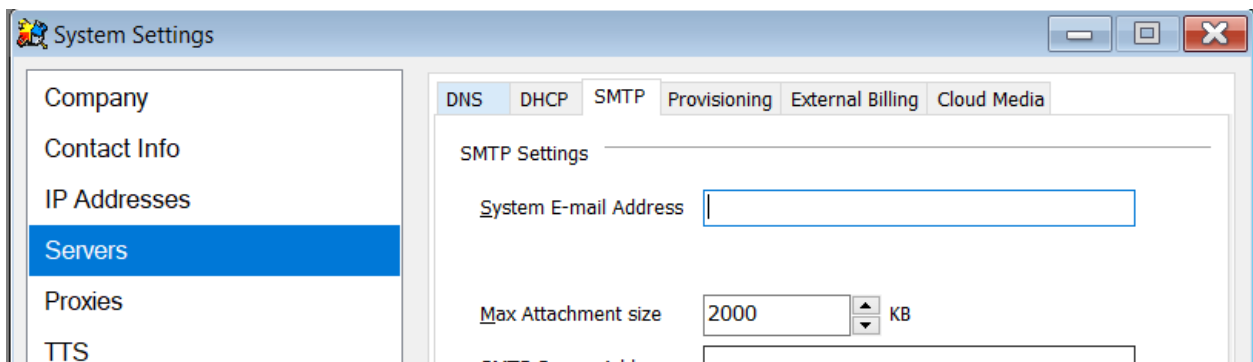
Regards

Save Cancel Help

- Edit the template as desired.
Do not edit the values that start and end with % or the MX IP address value. These values will be automatically placed in the e-mail that is sent to the user.
- Click Apply.
- Click Send link to all users to send the reset password link e-mail.

6.3 Conditions

- System e-mail address must be configured in System Settings>Servers



- The Password Reset Link (PRL) is maintained in the event of an MX reboot.
- The rest function applies only to MX password settings, users configured for LDAP will not receive any password reset e-mails.

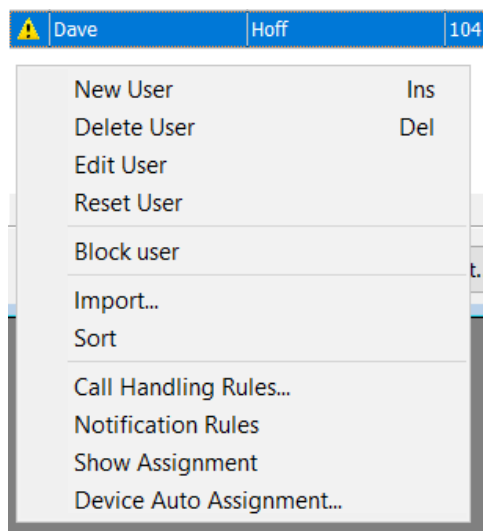
7 Reset User

7.1 Description

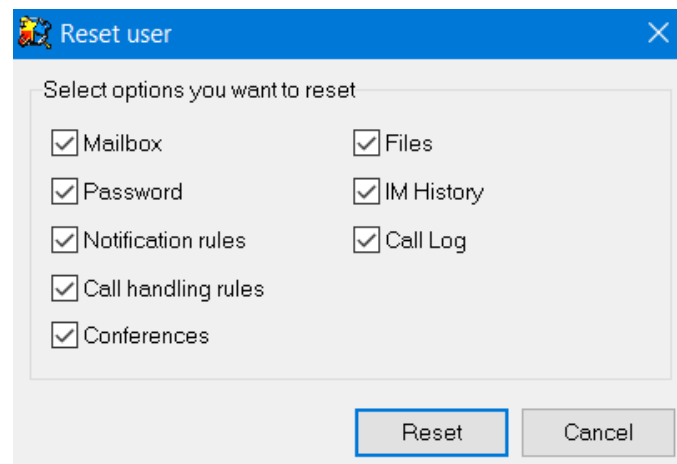
This feature has been enhanced to allow an MX Administrator to reset/clear Files, IM, an Call logs in addition to the previous options that were provided.

7.2 Operation

- MX Administrator>Configure>Users
- Right click on the desired user
- Select Reset User



- Select the user options to reset/clear by checking the options to reset.



- Click Reset

7.3 Conditions

- If the user's mailbox is reset in MX Administrator, voicemail messages are deleted permanently and do not appear in User's mailbox/in Trash bin.

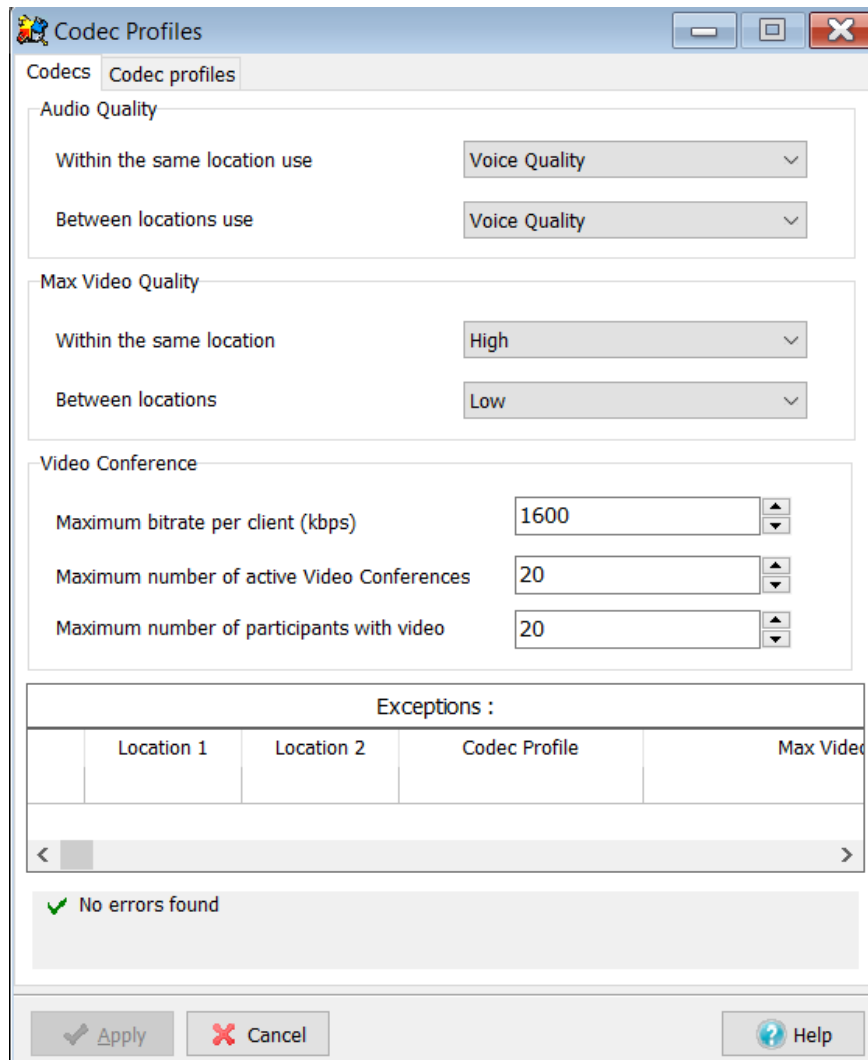
8 Video Settings

8.1 Description

MX Release 17 introduces multi-party video conferencing (Early Access) functionality for MX users and external guests. The user interface of this feature are described the Zultys Advanced Communicator and WebZAC manuals. This section describes video settings in MX Administrator that apply to the video conferencing feature.

8.2 Operation

MX Administrator > Provision > Codecs



Codec Profiles

Codecs Codec profiles

Audio Quality

Within the same location use Voice Quality

Between locations use Voice Quality

Max Video Quality

Within the same location High

Between locations Low

Video Conference

Maximum bitrate per client (kbps) 1600

Maximum number of active Video Conferences 20

Maximum number of participants with video 20

Exceptions :

Location 1	Location 2	Codec Profile	Max Video
<p>< ></p>			

✓ No errors found

Apply Cancel Help

Max Video Quality:

Within the same location – Select low, medium, or high

Between locations – Select low, medium, or high

Video Conference:

Maximum bitrate per client (kbps) – Select the maximum bitrate for each user participating in a video conference. Video performance can be affected by network throughput capacity and taken into consideration when assigning this value.

Maximum number of active video conferences – Select the maximum number of active video conference the MX system can have in use at one time. The maximum number is 20.

Maximum number of participants with video – Select the maximum number of participants a video conference may include. The maximum number is 20.

Note: “The multi-party video feature included with MX Release 17 will remain as Early Access. Zultys will provide a separate announcement when the multi-party video is available for General Release.

In addition, the following conditions will apply to the multi-party video feature released as part of MX Release 17:

–MX-SE/MX-E systems are limited to a total of five (5) video conferences, with each conference supporting up to twenty (20) participants maximum.

As part of a Beta program, this feature will be enabled for MX-SE and MX-E systems by default. Premise MX systems are limited to 5 conferences, each with a maximum of 20 users.

Capacities and limitations for each system will be determined during this process and are subject to change.

For MXvirtual and Zultys Cloud Services deployments, the multi-party video feature is disabled by default. To enable it, please send an email request to product.management@zultys.com.

9 MXoutbound Dialer Web Based

9.1 Description

This feature provides a web based interface for campaign managers to manage their MXoutbound Dialer campaigns. Users

The MXoutbound Dialer feature supports two user roles:

- Administrators create and edit Campaigns in MX Administrator and designate Users as Campaign Managers.
For more details on the capabilities of the Administrator, see the MXoutbound – Administrator’s Guide on kbs.zultys.com
- Campaign Managers can create Campaign Instances for a Multi Instance Campaign; add Contact Records to all types of Campaign Instances either by entering the contact’s information manually or by importing data from a CRM application; pause or resume an existing Campaign Instance; and export call results. Campaign Managers access MXoutbound from the MX landing page via a web browser.

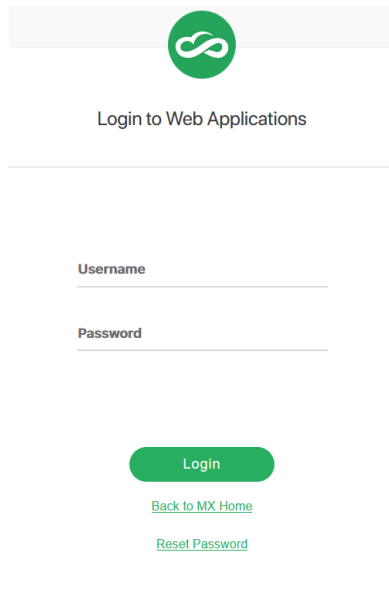
9.2 Operation

Once you have been granted Campaign Manager privileges by the administrator, you can access the Outbound Dialer window by navigating to the MX landing page and selecting Web Applications. This will allow you to create and manage campaign instances including adding/importing records.



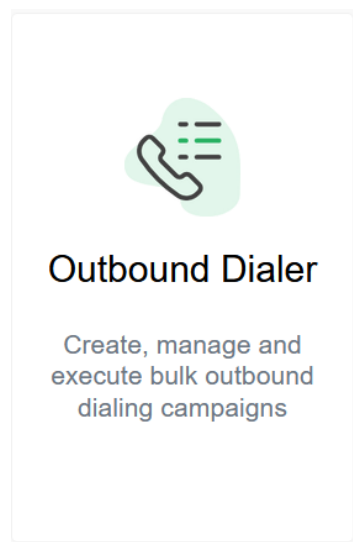
WEB APPLICATIONS

Enter your username and password to access the web application page.



The image shows a login form titled "Login to Web Applications". At the top is a green circular icon with a white infinity symbol. Below the title are two input fields: "Username" and "Password". Below these fields is a green "Login" button. At the bottom of the form are two links: "Back to MX Home" and "Reset Password".

Click the Outbound Dialer icon on the Web Application page:



The Outbound Dialer window opens and you can view all the currently available Campaign Instances for Campaigns you manage.

Outbound Dialer										
Status	ID	Campaign	Note	Initiator	Total	Calling	Not Started	Answered	Rescheduled	Not A
▶ Paused	2	NeilReminder			0	0	0	0	0	0
II Active	3	NeilReminder	my recording		8	0	0	8	0	0

The table in this window shows summary statistics for Campaign Instances.

Field	Description
Status	Current state of the Campaign Instance.
ID	Unique numeric ID of this Instance.
Campaign	This Instance's Campaign.
Note	A short note about this Instance
Initiator	The name of the Campaign Manager or Administrator who switched the instance to its current state
Total	Total number of Contact Records in this Campaign Instance
Calling	Number of Contact Records that MXoutbound is calling at this moment
Not Started	Number of Contact Records that MXoutbound has not called yet
Answered	Number of Contact Records with calls that were answered
Rescheduled	Number of rescheduled Contact Records. If previously configured by the administrator, MXoutbound

	automatically reschedules calls to a Contact Record if the previous call was unanswered
Not Answered	Number of unanswered Contact Records
Invalid	Number of Contact Records that MXoutbound cannot process

9.2.1 Creating a new campaign instance

- Click the Add New Campaign button

Add New Campaign

Create campaign

Campaign

Note

0 / 254

ID (Generated automatically)

0 / 3

Check ID

Cancel

Create

- Choose a Campaign from the drop-down list to create an Instance for. You can type an additional short note below.
- The ID field refers to the Instance ID, a unique numeric ID used to identify each Campaign Instance. Campaign Instance ID is assigned to each Campaign Instance when it is created and cannot be changed after that. You can either explicitly specify.

Create campaign

Campaign

NeilReminder

Note

Test create

11 / 254

ID (Generated automatically)

0 / 3

Check ID

Cancel

Create

- Click Create. The new instance is added to the list:

II	Active	1000	NeilReminder	Test create	Charles DeTrana...	0	0	0	0	0
----	--------	------	--------------	-------------	--------------------	---	---	---	---	---

- Double click the instance in the list to display all the information of the instance:

Outbound Dialer **NeilReminder** Test Create

II **Active** Total 0 Calling 0 Answered 0 Not Started 0 Rescheduled 0 Not Answered 0 Invalid 0 Initiator

Import Export Delete

Records

Set priority Set status Delete

Queued 0

Scheduled 0

Finished 0

Invalid 0

Priority Phone Number Status First Name

No records.

Add New Record

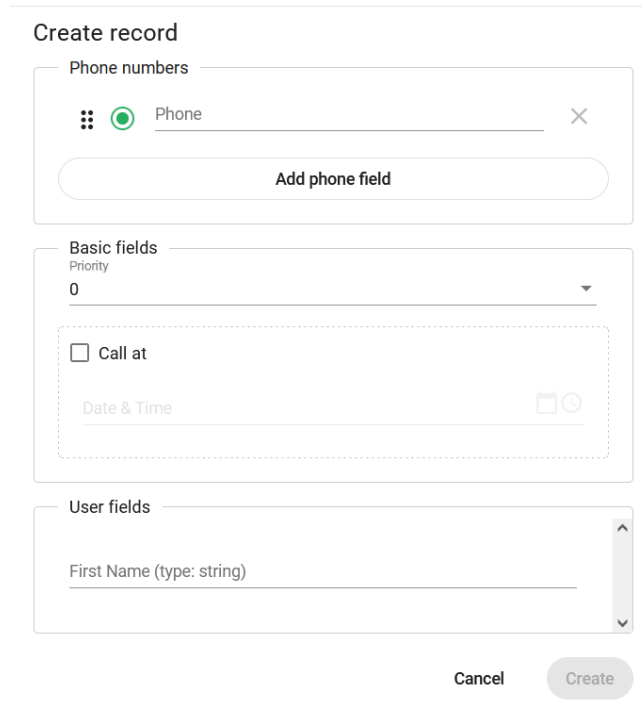
9.2.2 Adding contact records

A new Campaign Instance contains no Contact Records. You can add Contact Records manually from the Campaign Instance Window or you can import a Comma Separated Value (csv) file containing Contact Records.

If your Campaign Instance is currently in Active state, then MXoutbound begins to process new Contact Records immediately. If the Campaign Instance is Paused, then the new Contact Records are added to the queue and will be processed once the Campaign Instance is in Active state.

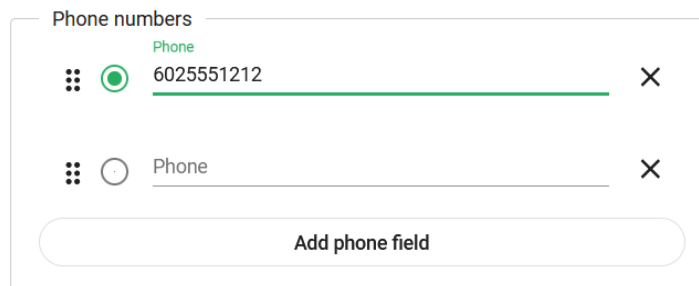
9.2.3 Manual addition

- In the Campaign Instance window click the Add New Record button. Create contact record dialog opens.



The 'Create record' dialog box is divided into three sections: 'Phone numbers', 'Basic fields', and 'User fields'. The 'Phone numbers' section contains a list of phone numbers with a green circle icon and a text input field labeled 'Phone'. Below this is an 'Add phone field' button. The 'Basic fields' section includes a 'Priority' dropdown menu set to '0', a 'Call at' checkbox, and a 'Date & Time' field with a calendar icon. The 'User fields' section has a 'First Name (type: string)' text input field. At the bottom right are 'Cancel' and 'Create' buttons.

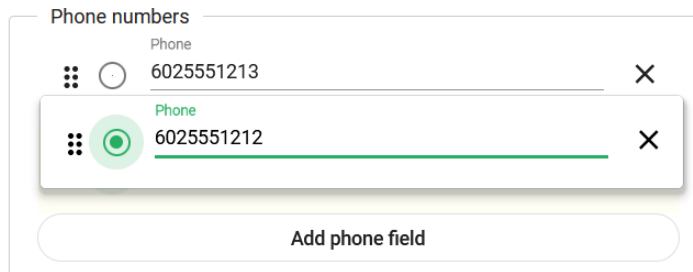
- Type a phone number to dial for this contact in the Phone Number field. You can delete the number by clicking the “x” button. If you need to add another number for the Contact Record, click the Add Phone Filed link and type the phone number in the new field. You can include up to four phone numbers.



This image shows a close-up of the 'Phone numbers' section of the 'Create record' dialog. It displays two phone number entries. The first entry has a green circle icon and the number '6025551212'. The second entry has a grey circle icon and the text 'Phone'. Each entry has a delete 'x' button to its right. Below the entries is an 'Add phone field' button.

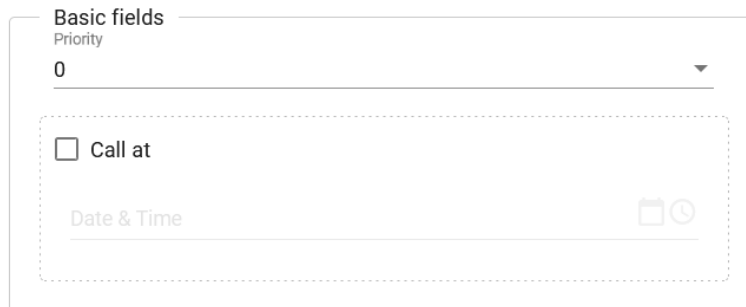
MXoutbound calls phone numbers listed in the order that they appear. If a call to the first phone number is not answered, then, if previously configured by the Administrator, MXoutbound switches to the next phone number on this list and so on.

To change the order of phone numbers on the list, click and hold a phone number and drag it up or down on the list to the desired order you want.



The image shows a UI element titled "Phone numbers". It contains a list of phone numbers. The first entry is "6025551213" with a small circle icon to its left. The second entry is "6025551212" with a green circle icon to its left. Each entry has a small "X" icon to its right. Below the list is a button labeled "Add phone field".

- Choose the priority level of this Contact Record from the drop-down list. By default, all records have the lowest priority.

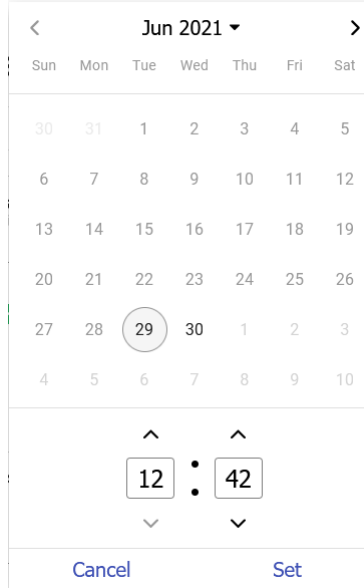


The image shows a UI element titled "Basic fields". It contains a "Priority" dropdown menu with the value "0". Below the dropdown is a checkbox labeled "Call at". Below the checkbox is a "Date & Time" input field with a calendar and clock icon to its right.

If you want to specify a time for MXoutbound to call this Contact Record, enable the Call At checkbox and specify the date and time to call. Click the date/time picker to bring up the calendar, click Set when finished.



The image shows a UI element titled "Call at". It contains a checked checkbox labeled "Call at". Below the checkbox is a "Date & Time" input field with a calendar and clock icon to its right.



If there are additional Custom Fields for this Campaign, you can specify their values below in the User fields section. If any Custom Fields have been configured as mandatory by the Administrator, then you will not be able to save the Contact Record until you specify the value for all mandatory Custom Fields. Otherwise, you may leave the Custom Field with its default value.

Note: The total length of all Custom Fields within one Contact Record cannot exceed 256 symbols.

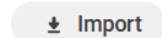


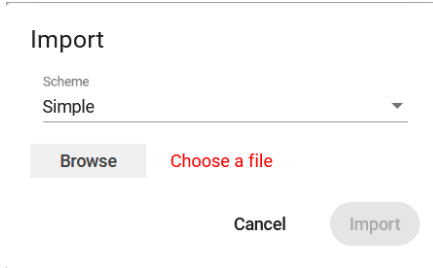
- Click Create.

9.2.4 Importing contacts

If the Campaign Administrator has configured one or more import schemas for the Campaign, you can import Contact Records from a csv file.

- Click the Import button in the Campaign Instance window.
The Import popup window opens:





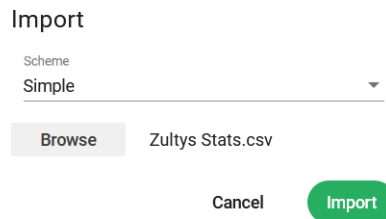
Import

Scheme
Simple

Browse Choose a file

Cancel Import

- In the Scheme field, select the Import Schema to use for this operation from the drop down list.
- Click Browse and select the csv file.



Import

Scheme
Simple

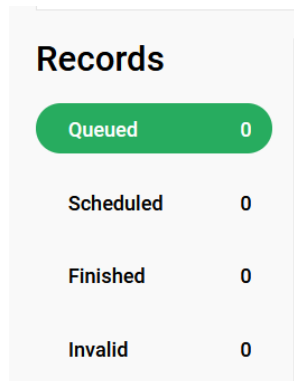
Browse Zultys Stats.csv

Cancel Import

- Click Import.

9.2.5 Managing contact records

You can view detailed information on all the Contact Records within a Campaign Instance window. Contact Records are separated into different tabs.



Records	
Queued	0
Scheduled	0
Finished	0
Invalid	0

Queued tab contains Contact Records in the dialing queue. The Contact Records in this tab do not include Call At time, and MXoutbound will make calls to these Contact Records once resources are available.

Scheduled tab contains Contact Records that include Call At time. MXoutbound will make calls to these Contact Records at the specified time.

The Scheduled tab also contains Contact Records that were rescheduled to be called again. If previously configured by the administrator, MXoutbound automatically reschedules calls to a Contact Record, if the previous call was unanswered.

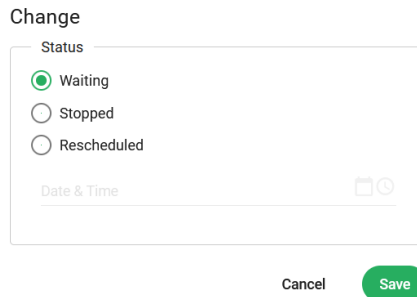
Finished tab contains Contact Records that MXoutbound finished dialing.

Invalid tab contains Contact Records that MXoutbound could not process.

9.2.6 Manually stopping, rescheduling, or restarting calls to contact record

You can manually change the state of a Contact Record to stop a call, reschedule it, or to restart calls.

- Enable the checkbox for a Contact Record and click Set Status. Alternatively, right-click on a Contact Record and select Set Status. The popup window opens.



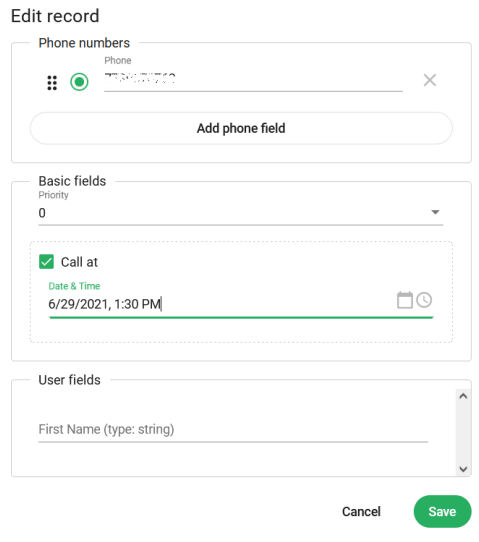
A screenshot of a 'Change Status' popup window. The window has a title bar 'Change' and a subtitle 'Status'. It contains three radio button options: 'Waiting' (selected), 'Stopped', and 'Rescheduled'. Below these is a 'Date & Time' field with a calendar icon. At the bottom are 'Cancel' and 'Save' buttons.

- Select Waiting to move the record to the dialing queue. MXoutbound will call this Contact Record once resources are available.
Select Stopped to stop making calls to this record.
Select Rescheduled and specify Call At time, to instruct the system to call this Contact Record at the specified time

9.2.7 Editing contact records

You can edit Contact Records in any tab.

- Click on the Status field in a Contact Record
Edit Contact Record dialog opens. This window is identical to the window used to create a new record.



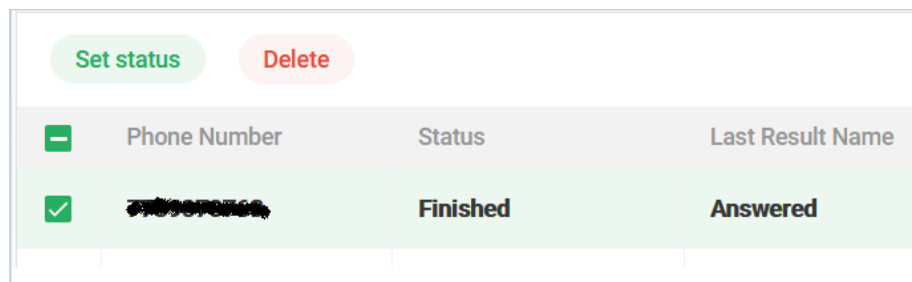
The 'Edit record' dialog box contains three main sections: 'Phone numbers', 'Basic fields', and 'User fields'. The 'Phone numbers' section has a 'Phone' field with a green status icon and a red 'X' icon, and an 'Add phone field' button. The 'Basic fields' section has a 'Priority' dropdown set to '0' and a 'Call at' section with a green checkmark, a 'Date & Time' field set to '6/29/2021, 1:30 PM', and a calendar icon. The 'User fields' section has a 'First Name (type: string)' field. At the bottom are 'Cancel' and 'Save' buttons.

- To add another number for the Contact Record, click the blue Add Number link and type the phone number in the new field.
- Edit other information inside the record as necessary and click Save.

9.2.8 Deleting contact records

To delete a record:

- Enable the checkbox for Contact Record and select the Delete button. You can delete multiple Records at once. This is done by selecting the top check box to select all or remove all records.



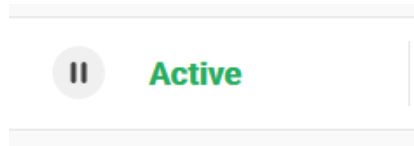
The table has a header row with columns: Phone Number, Status, and Last Result Name. Below the header is a row with a green checkmark in the first column, 'XXXXXXXXXX' in the second, 'Finished' in the third, and 'Answered' in the fourth. Above the table are two buttons: 'Set status' (green) and 'Delete' (red).

	Phone Number	Status	Last Result Name
<input checked="" type="checkbox"/>	XXXXXXXXXX	Finished	Answered

Note: You cannot have more than 5000 Contact Records simultaneously on your MX system. This limit is applied to all Campaign Instances on the MX system, including Campaigns you may not be a Campaign Manager for.

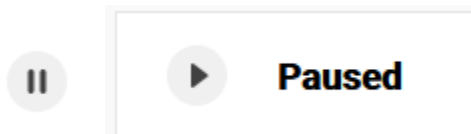
9.2.9 Pause/Resume campaign

You can view the state of a Campaign Instance in the top-left corner of the Campaign Instance window.

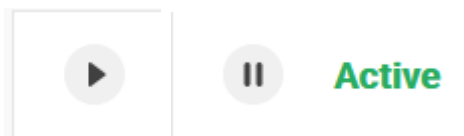


You can also view the current state from the main Outbound Dialer window. The current state is shown in the left-most column of the Campaign Instance list.

An active Campaign Instance can be paused at any time by clicking Pause in the Campaign Instance Window or by clicking Pause icon after selecting the Campaign in the main Outbound Dialer window. No calls are executed while the Campaign Instance is Paused.



To resume a Paused Campaign Instance, click Resume icon in the Campaign Instance Window or the main Outbound Dialer window.



If the administrator has configured MXoutbound not to make calls during a specific time period, for example during the night, then during the no-calls time the Campaign Instance is in Silent state.

No calls are made in Silent state. If a Contact Record is scheduled to be called during the no-calls time, MXoutbound will process the call after the Campaign Instance is in Active state again.

9.2.10 Export campaign results

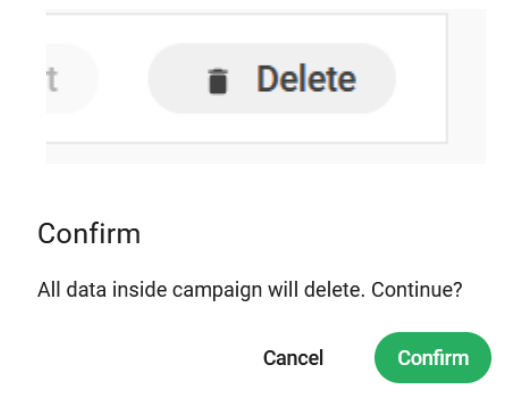
If the Campaign Administrator has configured one or more export schemas for the Campaign, you can export Campaign Instance Results into a csv file.

- Click the Export button in the Campaign Instance window. Export popup window opens.
- Click Browse and select the location and name of the file.
- In the Using field, select the Export Schema.
- Click Ok.

9.2.11 Deleting campaign instance

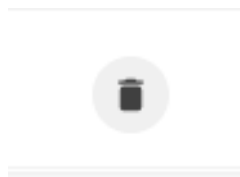
You can delete a Campaign Instance by clicking the Delete button in the upper-right of the Campaign Instance window.

When you delete a Campaign Instance, all Contact Records associated with it are also deleted.



- Click Confirm to proceed with the deletion.

You can also delete a Campaign Instance from the main Outbound Dialer window by selecting it from the Campaign Instance list and clicking Delete icon.



Note: You cannot have more than 8 Campaign Instances simultaneously on your MX system. This limit is applied to all Campaign Instances on the MX system, including Campaigns you may not be a Campaign Manager for.

9.3 Conditions

- User must be a manager in MX Administrator for access.
- To use the MXoutbound feature, the system administrator must first create and configure a new Campaign in MX Administrator's Outbound Dialer window.

10 Agent group login increase

10.1 Description

MX Release 17 now allows agents of ICC groups to simultaneously login to 32 ICC groups.

10.2 Operation

None. Agents perform the login function to groups up to 32 total.