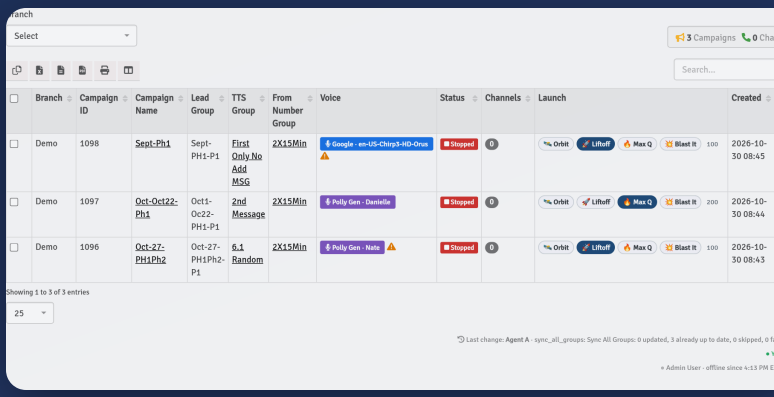
MONICA AI DIALER

Features

A detailed list of what the Monica AI Dialer does, grouped by area, with screens from the live portal.



Features · Version 1.0

October 30, 2026 · prepared for the November 2, 2026 launch

Screens shown with customer names hidden and phone numbers reduced to the last 4 digits.

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1. Overview

Monica AI Dialer is a hosted outbound calling platform. Calls are placed automatically with text-to-speech messages, and interested people call back into a queue answered by live agents in a browser webphone. Everything is run from one web portal.

Area	Highlights
Platform & access	Multi-company branches, roles with per-module permissions, login with security code
Campaigns	Auto or predictive dialing, AMD, schedules, one-click channel presets, live overview, retry and voice rotation, Sync
State targeting	States to dial, East/West presets and mix, per-state quality with on/off, State Metrics

Leads	CSV import with column mapping, phone-only duplicate check across all lists, skipped-rows report
Caller IDs	Number groups, static / time-based / time + state rotation, Caller ID Health, performance report
Messages & voices	TTS scripts with name placeholders, script groups, multiple TTS engines and voices
Compliance tools	State calling hours, DNC list, Mini-Miranda disclosure playback, change and idle audit trails
Agent webphone	Browser phone with clear status button, auto-hold, transfers, caller keypad
Live monitoring	Queue 4040 agent panel, On the way in, presence, idle detection
Inbound handling	Allowed numbers, unknown-caller greeting with voice picker, AI name verification, automated-caller handling, Daily Metrics
Reporting	Campaign CDR analytics, SIP error reports, Call Analysis charts, State Metrics, Change Log

Every feature in this document was confirmed in the platform code, the release change logs or a screen capture on October 30, 2026. Items that are built but not switched on are listed separately in the last section.

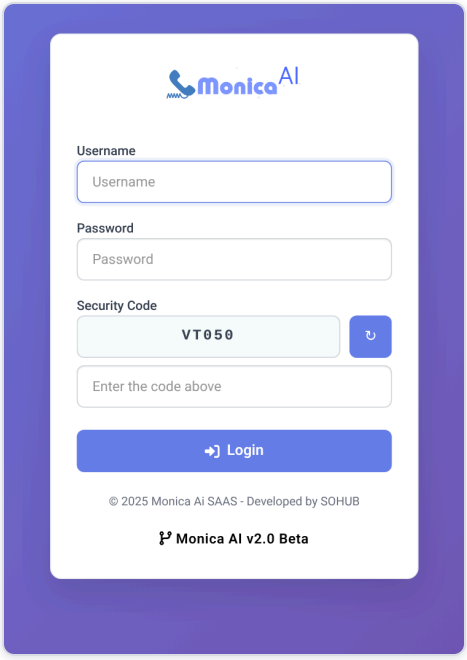
2. Platform and access

▸ **Multi-company branches.** Each client company is a branch with its own users, leads, campaigns, caller IDs, inbound settings, time zone and channel limit. Users only see their own branch; a Super Admin can filter by branch.

▸ **Roles and permissions.** Super Admin, Admin, Manager, User and a Dialer Specialist role. Each module has view, add, edit and delete switches, so menus and buttons appear only for what a user may do.

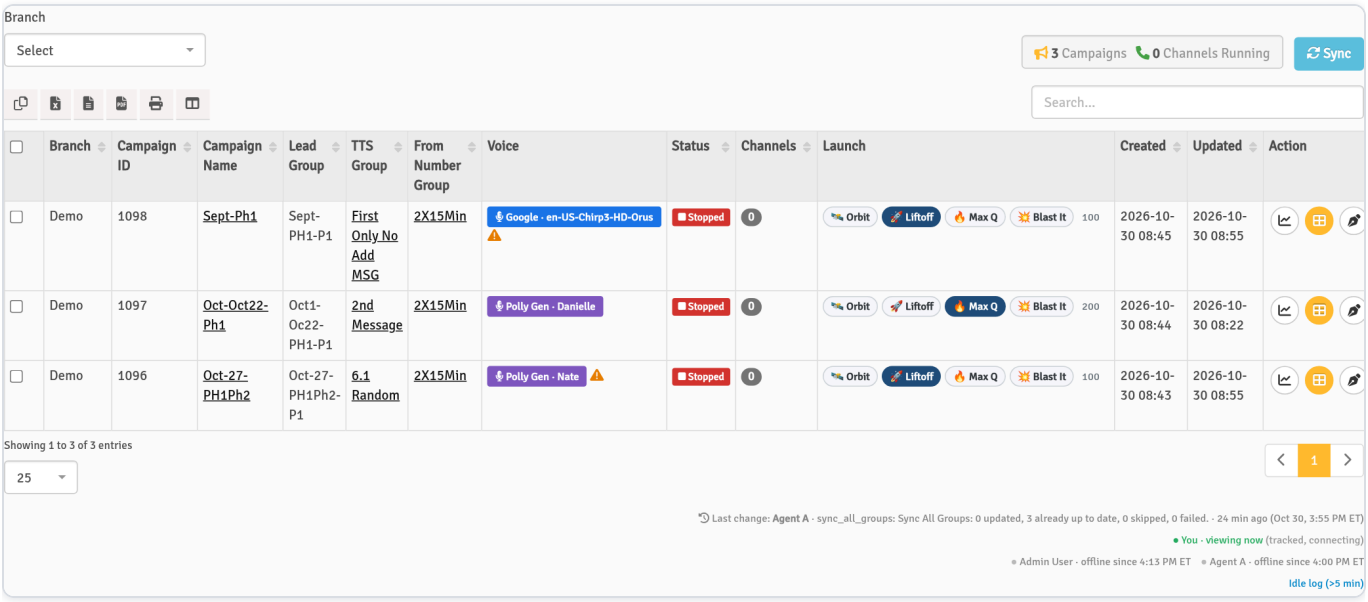
▸ **Secure login.** Username and password plus an on-screen security code. Sessions expire after inactivity.

▸ **Balances.** A Balances shortcut in the top bar for per-branch account balances.



Login with security code

3. Campaign management



Campaign list with Sync, Launch presets, voice badges and action buttons

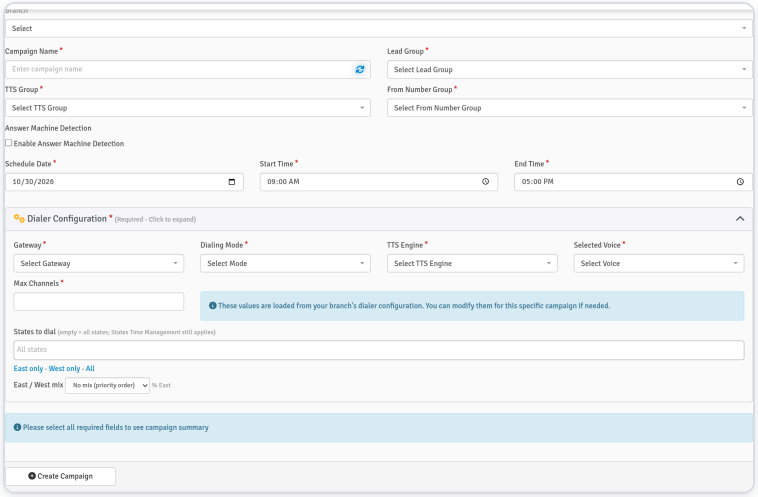
3.1 Building campaigns

▸ **Add Campaign form.** Campaign name (with a name generator), lead group, TTS group, from-number (caller ID) group, answer machine detection, schedule date, start and end time.

▸ **Dialer configuration per campaign.** Gateway, dialing mode (Auto Dialing or Predictive Dialing), TTS engine, voice and max channels, pre-filled from branch defaults and editable per campaign.

▸ **Edit Campaign.** Change name, gateway, groups, schedule, states and mix. The lead group is locked once created.

▸ **Live campaign summary.** The form shows a summary of the selections before you create the campaign.



Add Campaign form

3.2 Running campaigns

▸ **Start, pause and stop.** Start and pause from the list with a confirmation; a full STOP in the overview window.

▸ **Launch presets.** One-click channel levels: Orbit 50, Liftoff 100, Max Q 200, and Blast It 300 for 10 minutes with a countdown, automatically dropping back to 200. Presets are capped at the branch channel limit.

▸ **Channel control.** Gauge with − / +, −10 to +10 step buttons and a slider in the overview window. Changes apply immediately.

▸ **Campaign Overview & Configuration.** Totals for leads, pending, called, call later, DNC and calling; searchable Calling, Pending, Called and Call Later lists; a Call Analysis tab.

▸ **Call Analysis.** Hourly call performance, status distribution, call attempts distribution, caller ID performance, engine and voice performance, ASR, ACD, runtime and total attempts.

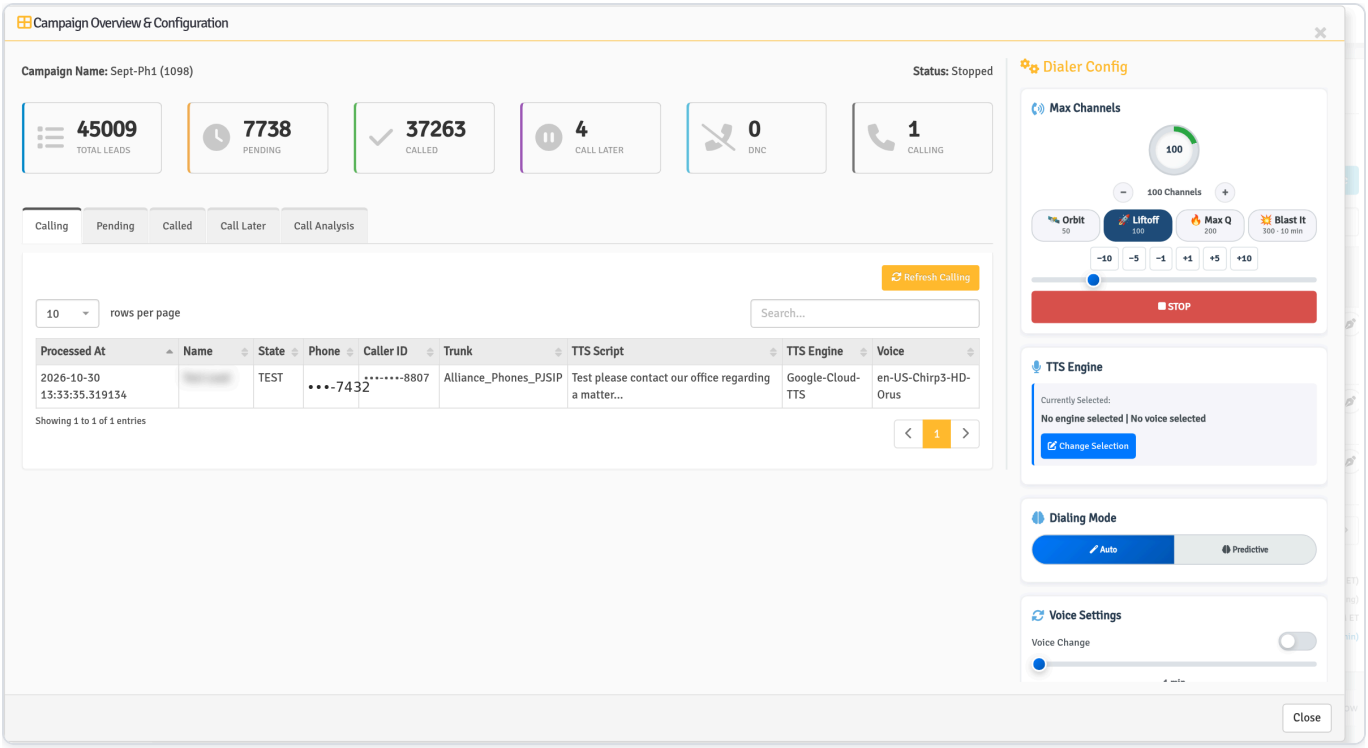
▸ **Voice and retry settings.** Switch TTS engine and voice live, automatic voice rotation with an interval, Max Retry and Retry Interval.

▸ **Voice badge.** Each campaign row shows its voice; a warning appears if the portal and dialer voices differ.

▸ **Sync.** One button pushes TTS and caller ID group changes to every active campaign in the branch, with a clear result within 60 seconds.

▸ **Test numbers.** Add a high-priority test call to a running campaign to hear the message and caller ID first.

▸ **Bulk delete.** Select several campaigns and delete them together (delete permission required).



Campaign Overview & Configuration

3.3 Audit trail

▸ **Change Log.** Every create, edit, delete, start, stop, pause, resume, test number, Sync and dialer-setting change, with user, time (ET) and before → after values.

▸ **Last change line.** A line under the campaign list shows the latest change, who made it and how long ago, refreshed every 20 seconds.

Time (ET)	User	Campaign	Action	Change
2026-10-30 8:55:15 AM	Agent A	#	sync_all_groups	Sync All Groups: 0 updated, 3 already up to date, 0 skipped, 0 failed.
2026-10-30 8:55:11 AM	Agent A	Oct-27-PH1Ph2 (#1096)	paused	Campaign paused
2026-10-30 8:55:09 AM	Agent A	Sept-Ph1 (#1098)	paused	Campaign paused
2026-10-30 8:52:55 AM	Agent A	#	sync_all_groups	Sync All Groups: 0 updated, 3 already up to date, 0 skipped, 0 failed.
2026-10-30 8:52:45 AM	Agent A	#	sync_all_groups	Sync All Groups: 0 updated, 3 already up to date, 0 skipped, 0 failed.
2026-10-30 8:52:43 AM	Agent A	Sept-Ph1 (#1098)	dialer config	Dialer settings: Max channels: 200 -> 100
2026-10-30 8:52:42 AM	Agent A	Oct-27-PH1Ph2 (#1096)	dialer config	Dialer settings: Max channels: 200 -> 100
2026-10-30 8:52:41 AM	Agent A	#	sync_all_groups	Sync All Groups: 0 updated, 3 already up to date, 0 skipped, 0 failed.
2026-10-30 8:52:37 AM	Agent A	Sept-Ph1 (#1098)	dialer config	Dialer settings: Max channels: 50 -> 200
2026-10-30 8:38:30 AM	Agent A	#	sync_all_groups	Sync All Groups: 0 updated, 3 already up to date, 0 skipped, 0 failed.
2026-10-30 8:31:21 AM	Agent A	Sept-Ph1 (#1098)	dialer config	Dialer settings: Max channels: 100 -> 50
2026-10-30 8:31:18 AM	Agent A	Sept-Ph1 (#1098)	dialer config	Dialer settings: Max channels: 70 -> 100
2026-10-30 8:27:12 AM	Agent A	#	sync_all_groups	Sync All Groups: 0 updated, 3 already up to date, 0 skipped, 0 failed.

Change Log (user names replaced)

4. State targeting and call quality

▸ **States to dial.** Limit any campaign to chosen states with a chip picker and East only / West only / All shortcuts. Empty means all states.

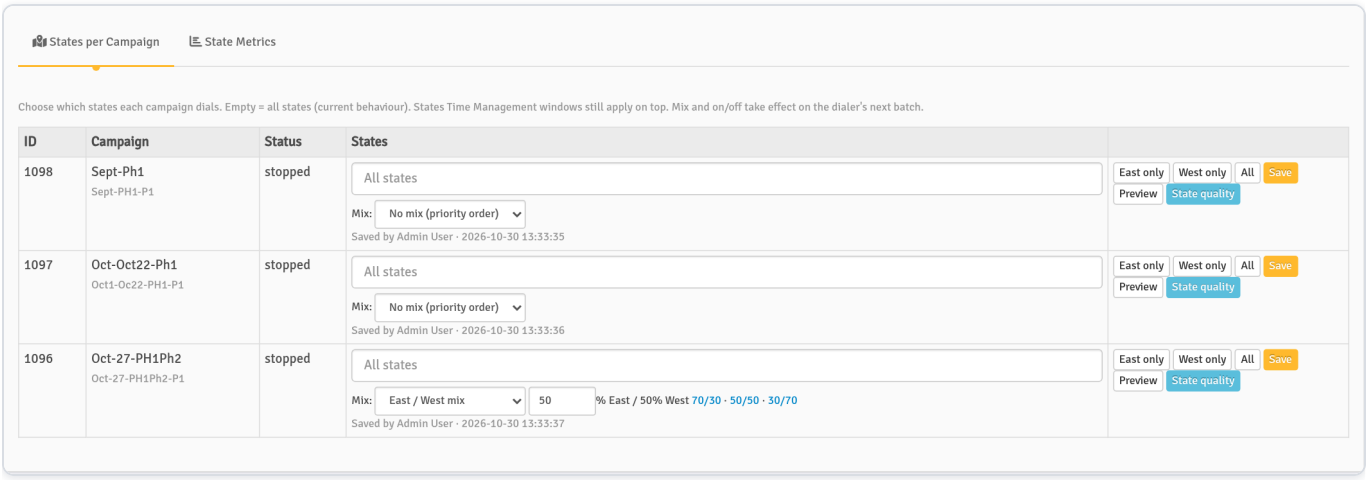
▸ **East/West mix.** Set a share of each batch for East (70/30, 50/50, 30/70 or custom). Batches fill East, then West, then the remainder, without double-picking leads.

▸ **Preview.** See dialable leads now and the next batch split before saving. Preview changes nothing.

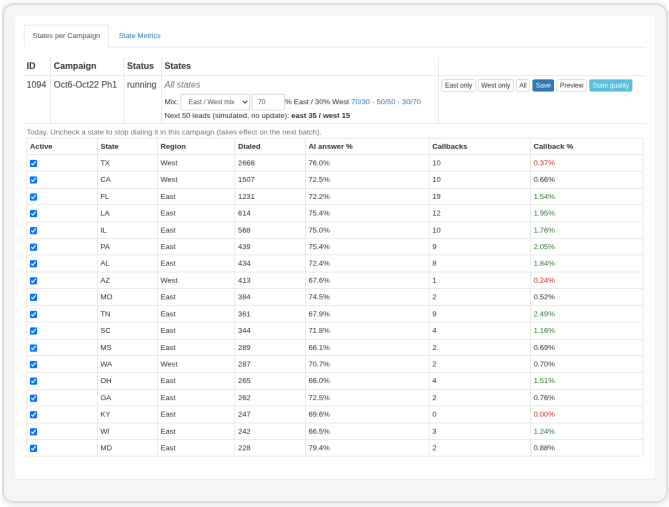
▸ **State quality.** Per-state dialed count, AI answer %, callbacks, callback % and pending leads for each campaign, with an on/off tick box to stop a weak state on the next batch. Every toggle is logged.

▸ **State Metrics.** Date-range report by state with region, leads dialed, AI answer %, callbacks and callback rates, optional split by campaign, and East/West totals.

▸ **Works with calling-hour rules.** State selection is applied on top of States Time Management and the time-zone check.



States per Campaign



State quality with on/off (preview data)

States per Campaign | State Metrics

From 10/29/2026 To 10/29/2026 Campaign All campaigns Split by campaign Run Inbound data up to 2026-10-29 12:12:56 ET

East: 25253 dialed · 71.3% answered · 257 callbacks (1.02%) West: 17257 dialed · 72.2% answered · 80 callbacks (0.46%)

State	Region	Leads dialed ▼	AI answer %	Callbacks	Callback % of dialed	Callback % of answered
TX	West	7456	74.5%	32	0.43%	0.58%
FL	East	4138	71.3%	38	0.92%	1.29%
CA	West	4068	72.0%	20	0.49%	0.68%
LA	East	2072	74.7%	32	1.54%	2.07%
IL	East	1789	71.5%	17	0.95%	1.33%
PA	East	1579	73.8%	17	1.08%	1.46%
MO	East	1517	73.2%	14	0.92%	1.26%
AL	East	1326	71.4%	15	1.13%	1.58%
SC	East	1224	71.7%	14	1.14%	1.59%
TN	East	1210	70.7%	16	1.32%	1.87%
AZ	West	1101	70.4%	5	0.45%	0.65%
MS	East	964	65.9%	18	1.87%	2.83%
GA	East	919	70.9%	9	0.98%	1.38%
OH	East	909	69.1%	7	0.77%	1.11%
WI	East	841	63.6%	5	0.59%	0.93%
IN	East	835	70.1%	5	0.60%	0.85%
MD	East	824	74.4%	8	0.97%	1.31%
KY	East	752	70.6%	3	0.40%	0.56%
VA	East	750	70.9%	7	0.93%	1.32%
MN	East	742	68.5%	3	0.40%	0.59%
WA	West	735	70.5%	5	0.68%	0.97%
OK	West	671	69.9%	3	0.45%	0.64%

Callback = an inbound call to the PBX from a number this dialer called, within 3 days after its first dial in the range. Showing top 22 of 49 states.

State Metrics (preview data)

5. Lead management

▸ **Leads List.** Searchable, exportable list (copy, CSV, Excel, PDF, print, column chooser) with branch and group filters and contact and group counters.

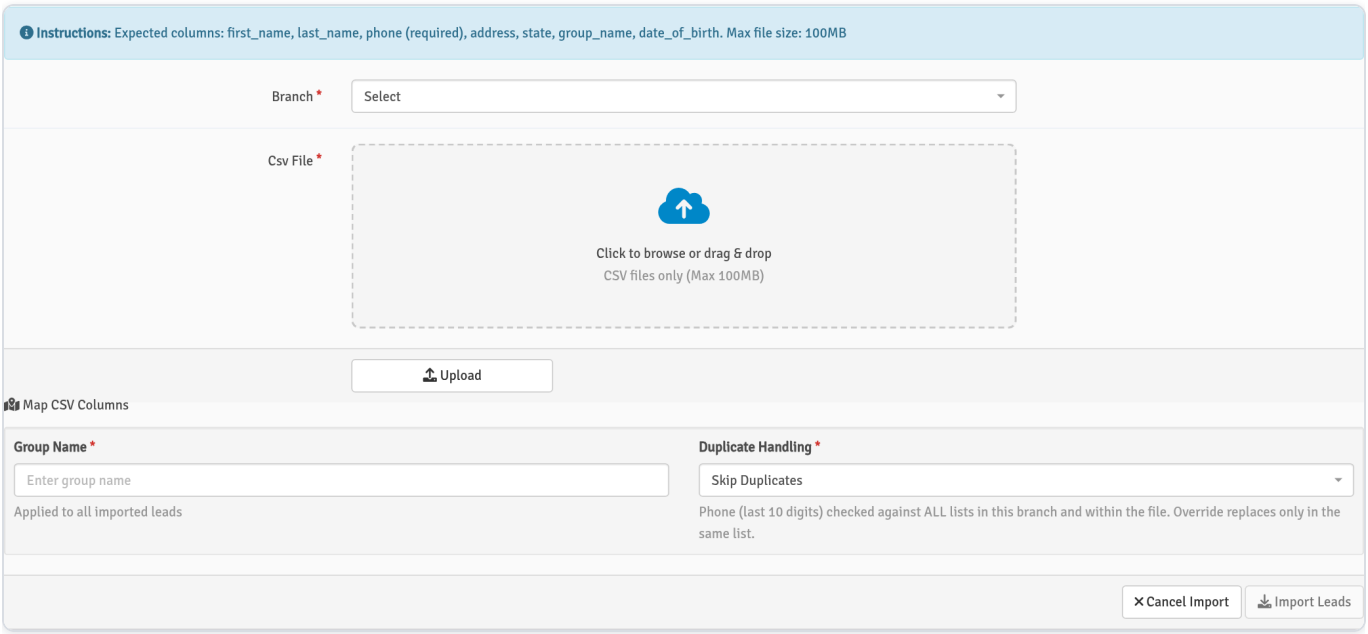
▸ **Add Lead.** Add a single lead by hand.

▸ **CSV import.** Files up to 100 MB with column mapping. Fields: first name, last name, phone, address, state, group name, date of birth. One list per file; phones of 10–15 digits are validated.

▸ **Phone-only duplicate check.** Phones are matched on their last 10 digits against every list in the branch and within the file. Skip Duplicates (default) or Override Duplicates, which replaces only inside the same list.

▸ **Skipped-rows report.** After an import, download a CSV of every skipped row with the reason and the list where the phone already exists.

▸ **Import progress.** Live counts of processed, imported, duplicate and error rows.



Import Leads with Duplicate Handling

6. Caller ID management

▸ **Number groups.** Organise caller IDs into groups; each campaign uses one group. Group list with counts and quick filtering.

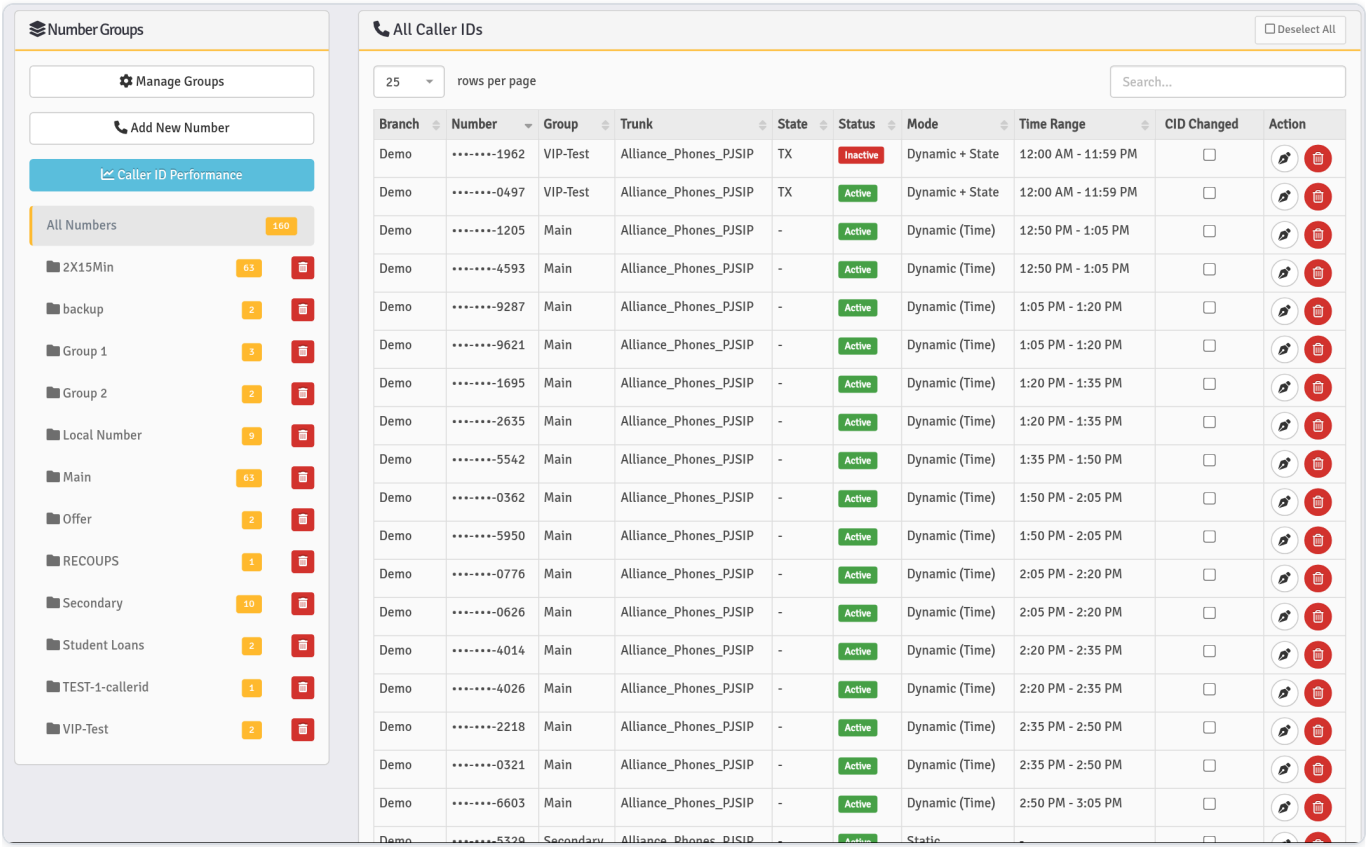
▸ **Rotation modes.** Static (any time), Dynamic (Time-based) with a start/end window, and Dynamic + State Check (window plus state matching).

▸ **Number details.** 11-digit number, group, trunk, optional state, status (Active/Inactive), mode and time range.

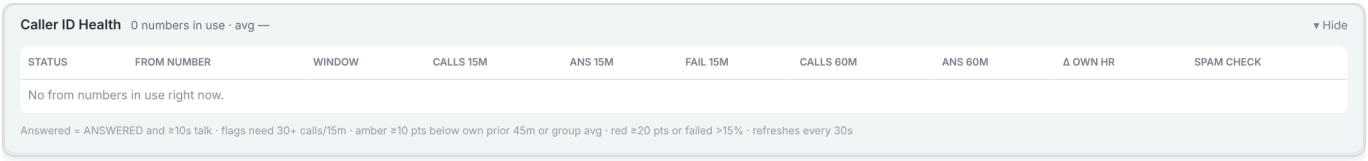
▸ **CID Changed flags.** A tick box per number that saves instantly, with a Deselect All button.

▸ **Caller ID Performance report.** Calls, answered, ASR % and ACD per number for any recent window in minutes.

▸ **Caller ID Health panel.** On Campaign Management: per-number calls, answer and failure rates for 15 and 60 minutes, change against its own last hour, Healthy / Slipping / Drop / Low vol status, a spam check (Clean / Flagged / Blocked) and a “Swap this number” alert. Refreshes every 30 seconds.



Caller ID Management (numbers shortened to the last 4 digits)



Caller ID Health panel

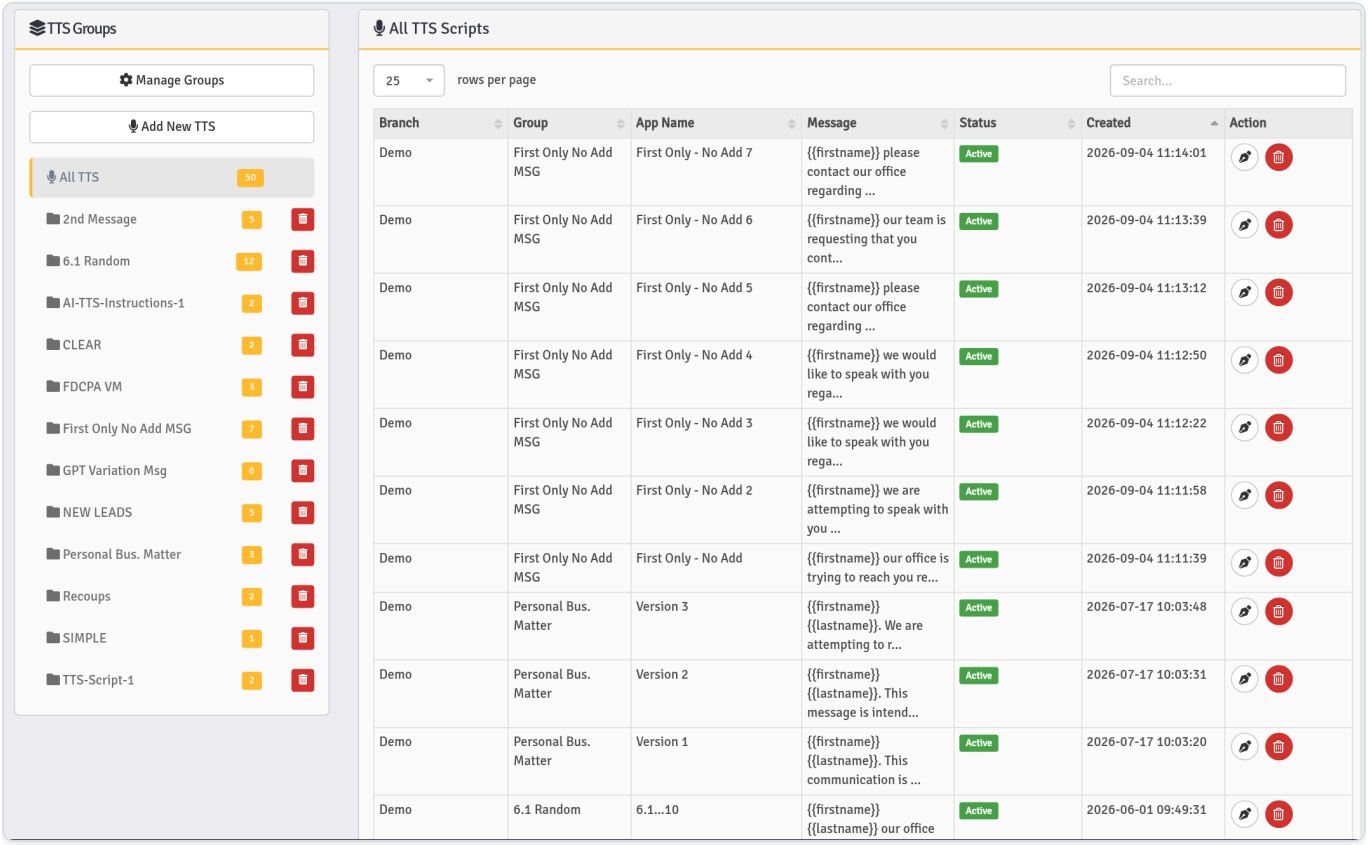
7. Messages and voices

▸ **TTS scripts.** Message scripts with personalisation placeholders such as {{firstname}} and {{lastname}}, organised into TTS groups.

▸ **Script groups.** Campaigns pick a TTS group; groups can hold several script versions.

▸ **Engines and voices.** Google Cloud TTS (including Wavenet, Neural2 and Chirp3-HD voices) and Amazon Polly voices are in use. Voice is chosen per campaign.

▸ **Automatic rotation.** Branch defaults can rotate caller IDs, voices and TTS scripts on set intervals.



TTS Management

8. Compliance tools

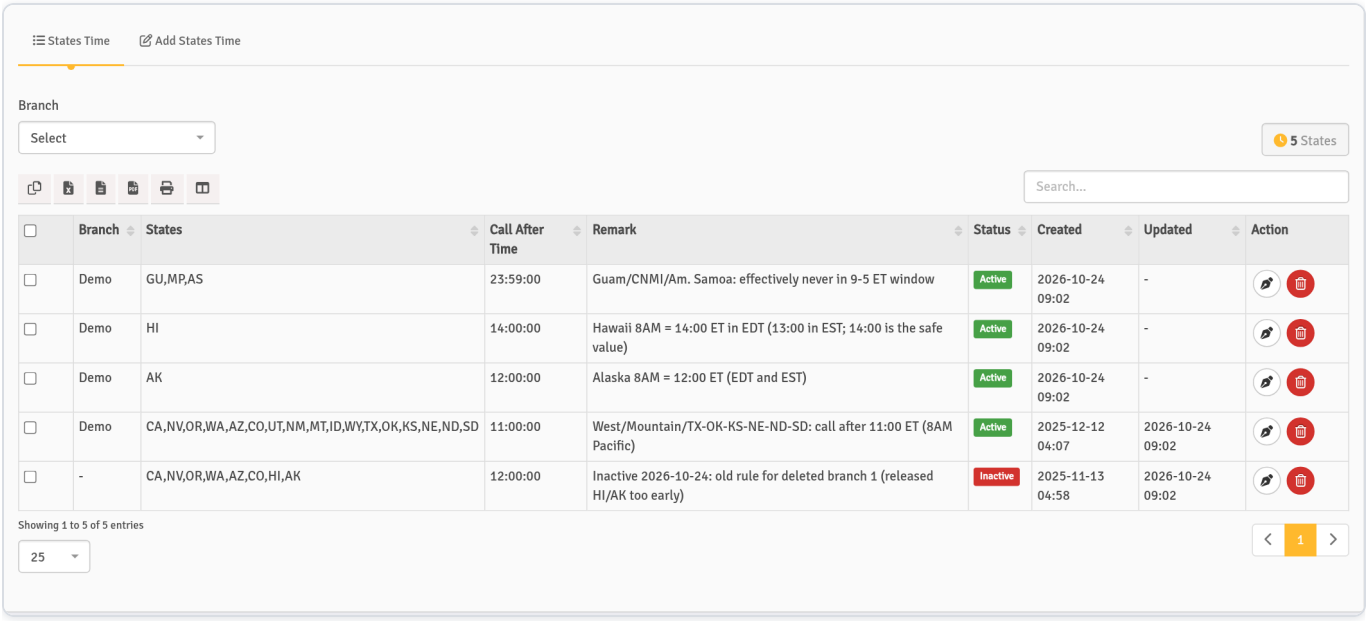
▸ **States Time Management.** Earliest allowed calling time per state or group of states (for example West states after 11:00 ET), with remarks and active/inactive status.

▸ **Time-zone check.** Leads are held until their state's calling window opens.

▸ **DNC Numbers.** Do-not-call list with groups, single add and CSV import.

▸ **Mini-Miranda playback.** Agents play a recorded disclosure into a live call with one click, in a choice of three voices.

▸ **Audit trails.** Change Log, Last change line, login records and the Idle log.



States Time Management

> **Your responsibility**
>
> The platform provides the controls. Each client is responsible for its own scripts, calling hours, consent and DNC compliance, reviewed by its own counsel.

9. Agent webphone

▸ **Runs in the browser.** Chrome or Edge; nothing to install. Encrypted WebRTC audio.

▸ **Big status button.** One square button shows Registered (green), Unregistered or failed (red), Connecting (grey). Click to register or unregister. Smooth colour change between states.

▸ **Extension badge.** The agent's extension number in the top-left circle.

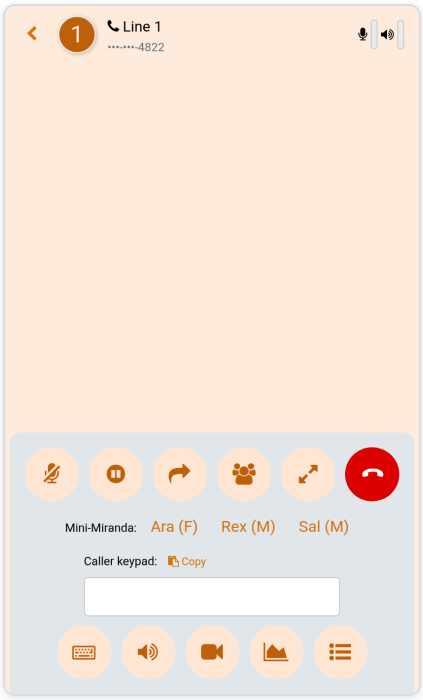
▸ **Answer, reject and auto-hold.** Answer or reject with one click; answering a second call puts the first on hold automatically. Desktop notifications for incoming calls.

▸ **Call controls.** Mute, hold, blind and attended transfer, conference, keypad tones, call statistics and timeline.

▸ **Mini-Miranda buttons.** Ara (F), Rex (M) and Sal (M) disclosure playback during a call.

▸ **Caller keypad.** Shows digits pressed by the caller during the call.

▸ **Orange and grey theme.** Light theme in the Monica colours, with dark mode following the computer's setting.



In-call screen (sample number)



Registration button states

10. Live floor monitoring

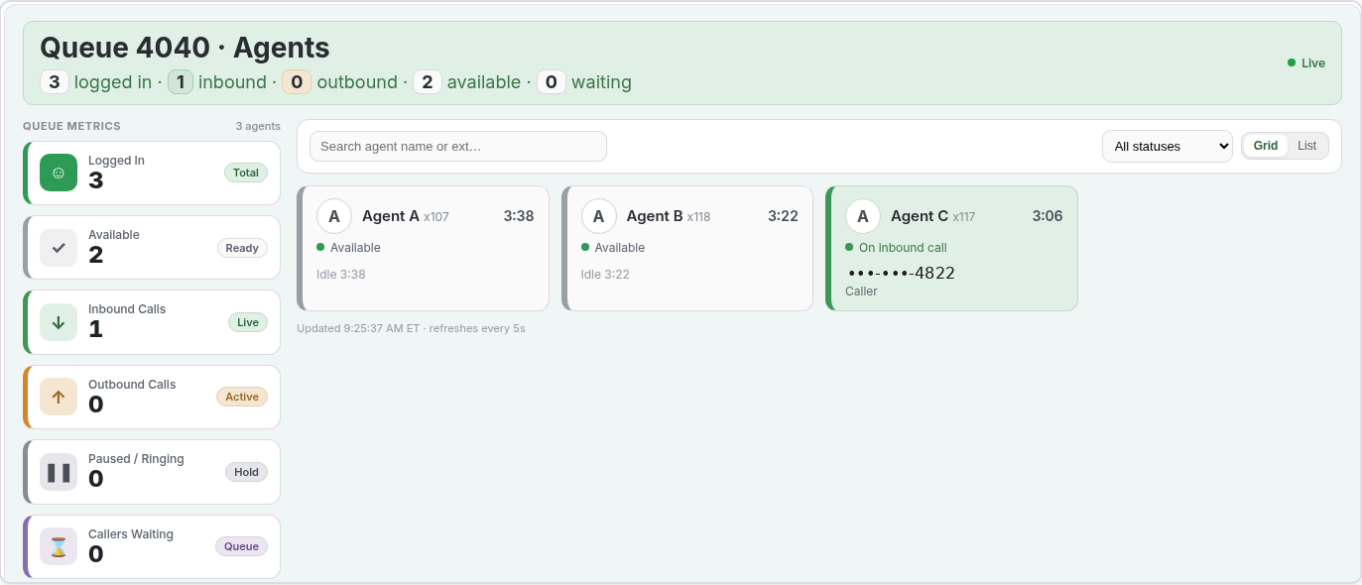
▸ **Queue 4040 · Agents.** Live panel refreshed every 5 seconds with a ticking timer: header counts (logged in, inbound, outbound, available, waiting), a clickable metrics sidebar, and colour-coded agent cards (green inbound, orange outbound, white available, grey ringing/paused/busy) showing extension, state, timer and caller number.

▸ **Search, filter, Grid/List.** Search by name or extension, filter by status, and switch between Grid and List views. Responsive on narrow screens.

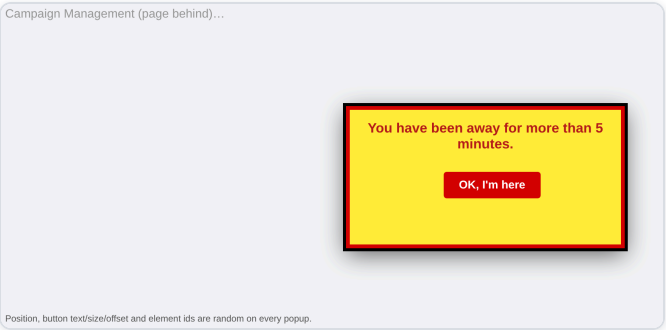
▸ **Queue 4040 · On the way in.** Callers hearing the greeting and callers waiting to be answered.

▸ **Presence.** Admins see whether each user has Campaign Management open: viewing now, away/idle N minutes, or offline since a time. Every user sees their own status line.

▸ **Idle detection.** After 5 minutes without activity, non-admin users get a popup that only a real click closes. Each event is logged (start, popup, back, duration, real click), and admins read it in the Idle log.



Queue 4040 · Agents, Grid view (sample agents)



Idle popup



Last change and presence

11. Inbound callback handling

▸ **Allowed numbers.** A list of numbers allowed through to agents, with add, CSV import and remarks.

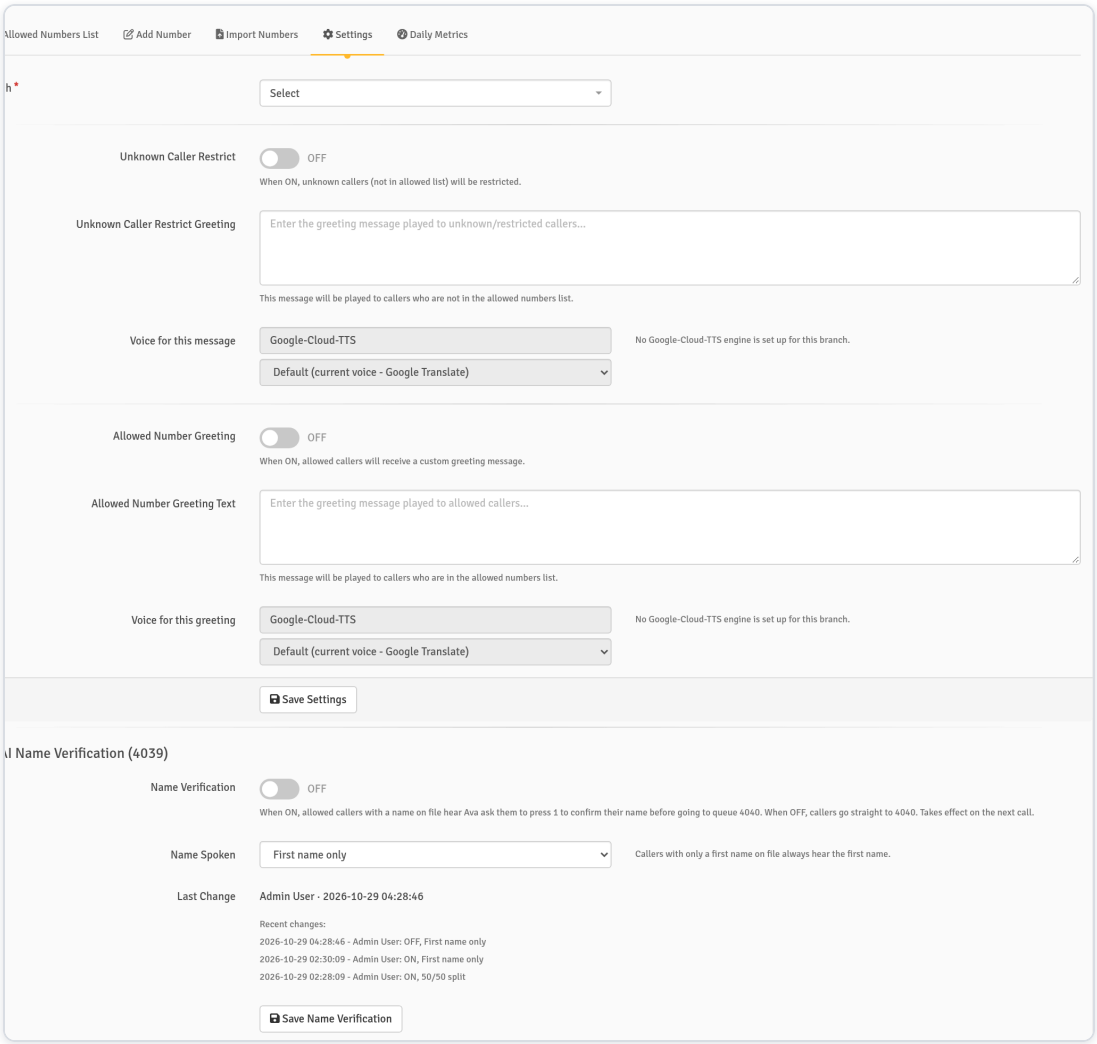
▸ **Unknown-caller greeting.** When Unknown Caller Restrict is on, callers not on the list hear a message; the voice is chosen from a list.

▸ **Allowed-number greeting.** Optional greeting for callers on the list, with its own voice.

▸ **AI Name Verification (4039).** An admin switch. When on, the virtual assistant “Ava” asks a matched caller to press 1 to confirm their name before going to queue 4040. Name Spoken: full name, first name only or a 50/50 split. The last change and recent changes are shown.

▸ **Known automated callers.** Recognised robot callers get a short message and are disconnected; a daily detector adds new ones (never numbers on the allowed list).

▸ **Daily Metrics.** Inbound calls passed and rejected per day.



Inbound Allowed Numbers → Settings with AI Name Verification (names replaced)

12. Reporting

▸ **Campaign Reports.** Campaign CDR analytics dashboard by branch, campaign and date range.

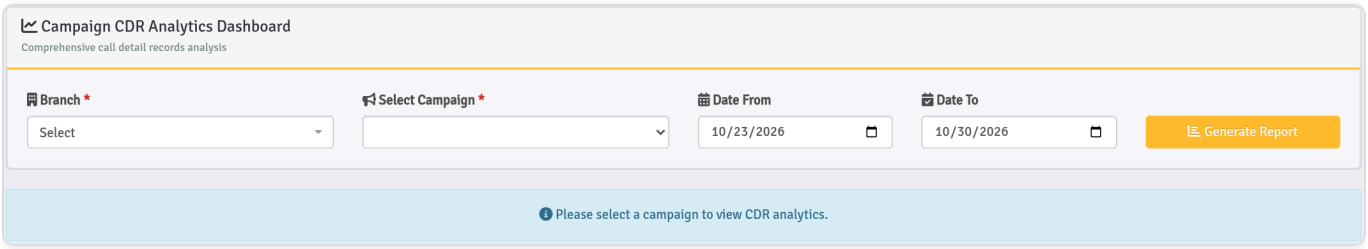
▸ **SIP Error Reports.** Carrier and SIP error reporting.

▸ **Call Analysis.** Charts inside each campaign (see Campaign management).

▸ **State Metrics and State quality.** State-level dialing and callback results.

▸ **Caller ID Performance.** Per-number answer rate and call length.

▸ **Call Quality.** A Call Quality menu entry opens the Command Center call-quality page in a new tab (separate login).



Campaign Reports

13. Dialer configuration

▸ **Branch defaults.** Default gateway, dialing mode, max concurrent channels, max retry and retry interval, TTS engine and voice.

▸ **Automatic rotation.** Auto change caller ID, voice and TTS script, each with its own interval in minutes.

▸ **Alerts and cost.** Dial cost, minimum balance alert and minimum leads alert.

▸ **Predictive settings.** ASR threshold, ACD threshold, check interval, multiplier and the extensions list used for predictive pacing.

14. Built and tested, not live yet

These items exist as tested builds but were not switched on in production on October 30, 2026. They are not part of the standard feature set until released.

Item	Status
Webphone without Do Not Disturb (menu item removed, stuck DND cleared on reload)	Preview built Oct 30, 2026
Unknown callers press 0 to reach an Unknown Numbers line, press 9 for do-not-call, and *66 hard block	Test build Oct 28, 2026
Automatic redial blocking	Test build Oct 28, 2026
Call transcription	Test build Oct 28, 2026
Duplicate guard across two running campaigns (same phone in two lists)	Designed, not installed