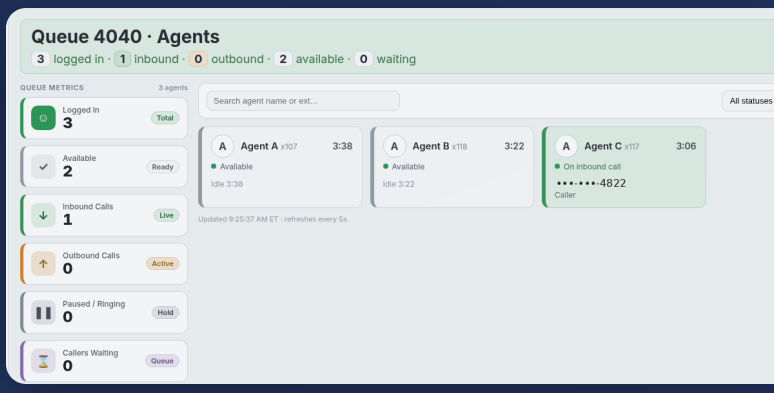
MONICA AI DIALER

Training Manual

Step-by-step guide for agents, supervisors and admins: webphone, campaigns, the Queue 4040 panel, leads, states, caller IDs and test calls.



Training Manual · 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. About this manual

This manual teaches the day-to-day use of the **Monica AI Dialer**: the hosted outbound dialer, its web portal and the agent webphone. Each section starts with a tag that shows who it is for.

Tag	Who	Typical tasks
AGENTS	Call takers who answer callbacks and transfers	Log in to the webphone, take and transfer calls, keep the status green.

SUPERVISORS	Floor leads and dialer operators	Watch the Queue 4040 panel, start and pause campaigns, adjust channels, run test calls, press Sync.
ADMINS	Client administrators	Import leads, build campaigns, choose states and caller ID groups, read the Change Log and Idle log.

1.1 Conventions

- Names of buttons, tabs and fields are shown in **bold**, exactly as they appear on screen.
- Screens in this manual come from the live portal and from approved preview builds. Customer names are blurred and phone numbers show only the last 4 digits.
- Times in the portal are shown in Eastern Time (ET) where a screen says so.
- A setting that saves the moment you change it is marked *saves instantly*. There is no separate Save button for those.

Golden rules

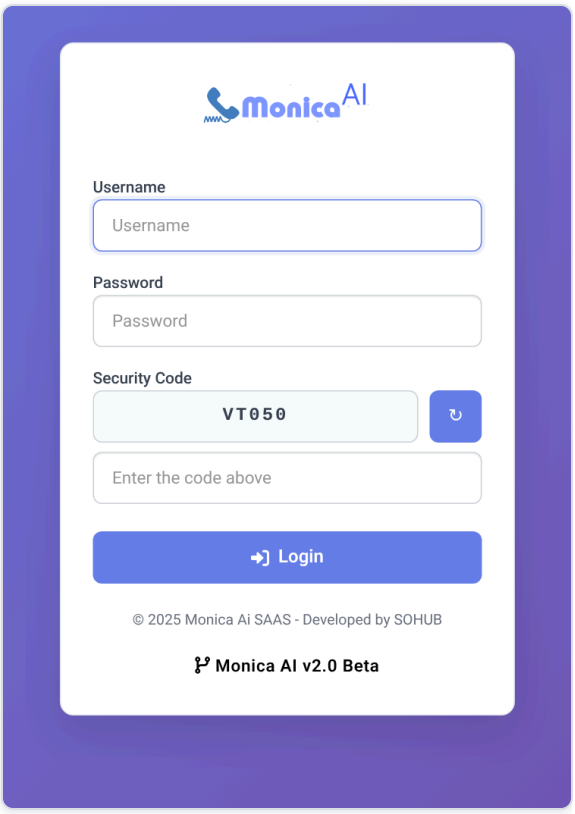
- Keep one webphone tab open and your status button **green**.
- Do **not** use Do Not Disturb (DND).
- Change one campaign setting at a time, then check the Change Log.
- Test with a test number before you dial a new list.

2. Getting started

2.1 Logging in to the portal

AGENTS SUPERVISORS ADMINS

1. Open the portal address your administrator gave you in Google Chrome or Microsoft Edge. Bookmark it.
2. Type your **Username** and **Password**.
3. Type the 5-character **Security Code** shown in the grey box into **Enter the code above**. Letters are not case-sensitive. Click ↻ for a new code if it is hard to read.
4. Click **Login**. You land on the dashboard. Use the left menu to move around.
5. If a page sends you back to the login screen, your session has ended. Log in again.



The login screen with the Security Code check

> **Keep your login private**
> Never share your password or write it in chat or email. If you think someone else knows it, ask your admin to change it.

2.2 The main menu

Menu item	What it is for
Dashboard	Live statistics for your branch (a Super Admin first picks a branch).
Campaign Management	Campaign list, Add Campaign, Change Log, States & Call Quality, Caller ID Health, Queue 4040 panels.
Lead Management	Leads List, Add Lead and Import Leads (CSV with duplicate check).
TTS Management	Message scripts and TTS groups used by campaigns.

Caller ID Management	Caller ID numbers and number groups.
States Time Management	Earliest calling time per state.
DNC Numbers	Do-not-call list.
Inbound Allowed Numbers	Who may call back in, inbound greetings and Daily Metrics.
Campaign Reports / SIP Error Reports	Call detail analytics and carrier error reports.
Dialer Configuration	Branch-wide dialer defaults.

2.3 Roles and permissions

Each user has a role, and each menu module has four permission switches: **view**, **add**, **edit** and **delete**. Users only see their own branch (company); a Super Admin sees all branches and gets a **Branch** filter.

Role	Typical use
Super Admin	Platform owner. All branches.
Admin	Runs one client branch: users, leads, campaigns, inbound settings. Sees other users' presence and the Idle log.
Manager / User	Supervisors and staff, with the modules the admin grants.
Dialer Specialist	Campaign operator: can view and edit campaigns and use Sync, but cannot delete campaigns.

3. The agent webphone

AGENTS

The webphone is a web page that turns your browser into a phone. Nothing is installed. Your admin gives you the webphone address and your extension details.

3.1 Before your first shift

1. Plug in your headset **before** opening the browser.
2. Open the webphone address in Chrome or Edge.
3. When the browser asks to use your **microphone**, click **Allow**. When it asks to show **notifications**, click **Allow**. Notifications are how you see a ringing call when the tab is in the background.
4. If the account form is not filled in, click the gear icon and choose **Configure Extension**. Enter the details from your admin (server, port, path, extension number and password), then click **Save**.
5. Your extension number appears in the orange circle at the top left.

3.2 Register and unregister

The big square button next to your name shows your phone status. You can take calls only when it is **green**.



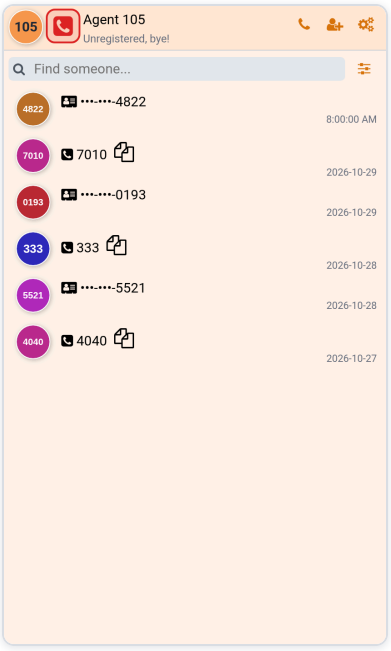
The registration button in each state

Button	Status text	What to do
Green	Registered	You are ready. Do nothing.
Red	Unregistered, bye! / Registration Failed / Web Socket Error	Click the red button to register. If it stays red, check your network and tell your admin.

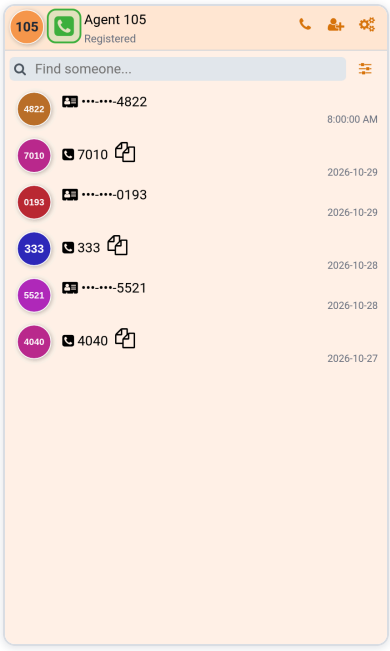
Grey	Connecting to Web Socket... / Disconnected	Wait 5–10 seconds. It reconnects by itself.
Burnt orange	Registered (DND)	Do Not Disturb is on and calls are rejected. Turn it off now (see 3.3).

To register (start of shift)

1. Open the webphone tab. Keep only **one** webphone tab open; a second tab signs the first one out.
2. If the button is red, click it once. It turns grey, then green.
3. If it does not turn green in 15 seconds, click the gear and choose **Refresh Registration**.



Unregistered (red)



Registered (green), ready for calls

To unregister (end of shift or long break)

1. Finish or transfer any open call.
2. Click the **green** button. It turns red and shows **Unregistered, bye!**
3. Close the webphone tab.

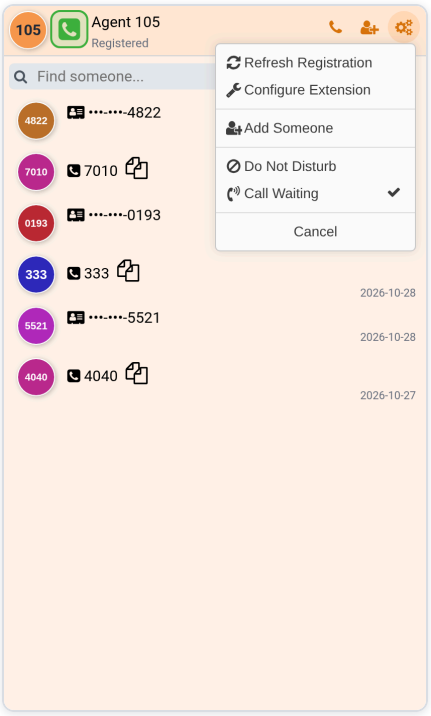
3.3 Do not use Do Not Disturb

> **Agents must not use DND**
> DND makes the webphone silently reject every inbound call while you still look logged in. Callers waiting in queue 4040 are not offered to you, and supervisors cannot see from the portal that your phone is blocking calls.

If your button is burnt orange and says “Registered (DND)”:

1. Click the gear icon (top right of the webphone).
2. Click **Do Not Disturb** once to switch it off. The tick disappears.
3. Check the button is green again.

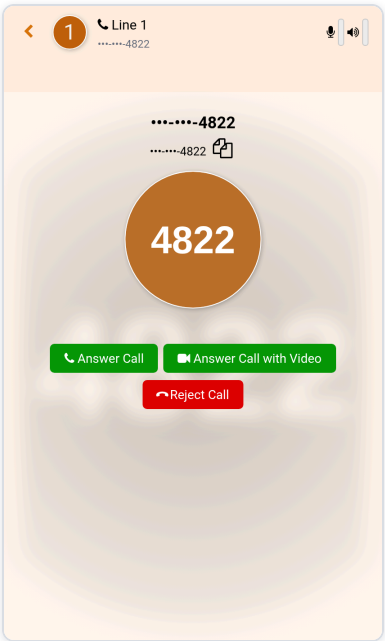
Never dial `*76` or `*78` from the webphone. Those phone-system codes also switch DND on.



The gear menu. Leave Do Not Disturb unticked.

3.4 Taking calls

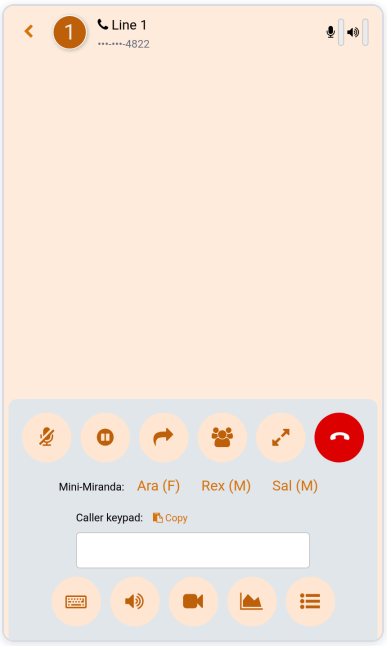
1. When a call rings you hear the ringtone, and a desktop notification appears if the tab is hidden. Click the notification to bring the phone to the front.
2. Click **Answer Call** (green) to answer, or **Reject Call** (red) to decline.
3. If you are already on a call and answer a new one, the first call is put on hold automatically.
4. Greet the caller with your company script and verify identity before discussing any account.



An incoming call

3.5 During a call

- **Top row of in-call buttons:** mute, hold, transfer, conference, expand and the red hang-up button.
- **Bottom row:** dial pad (to send keypad tones), audio settings, video, call statistics and the call timeline.
- **Mini-Miranda:** the **Ara (F)**, **Rex (M)** and **Sal (M)** buttons play the recorded disclosure into your live call in that voice (about 13 seconds). The status next to the buttons shows “Playing…”.
- **Caller keypad:** shows the digits the caller presses during the call.

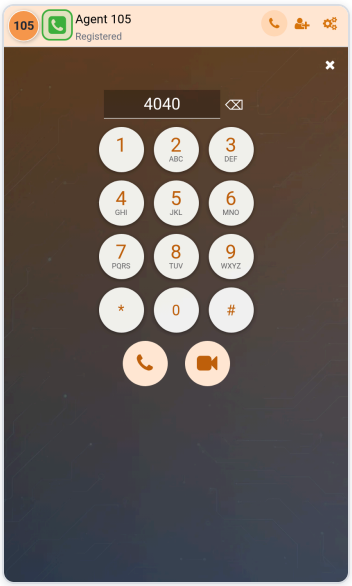


In-call controls, Mini-Miranda buttons and Caller keypad

3.6 Transferring a call to queue 4040

1. Click the transfer button during the call.
2. Type `4040` (or the extension you want) and choose a blind or attended transfer.
3. For an attended transfer, speak to the next person first, then complete the transfer.

On a desk phone without a transfer button: `*2` then 4040 for an attended transfer, or `##` then 4040 for a blind transfer.



The dial pad

3.7 Everyday tips

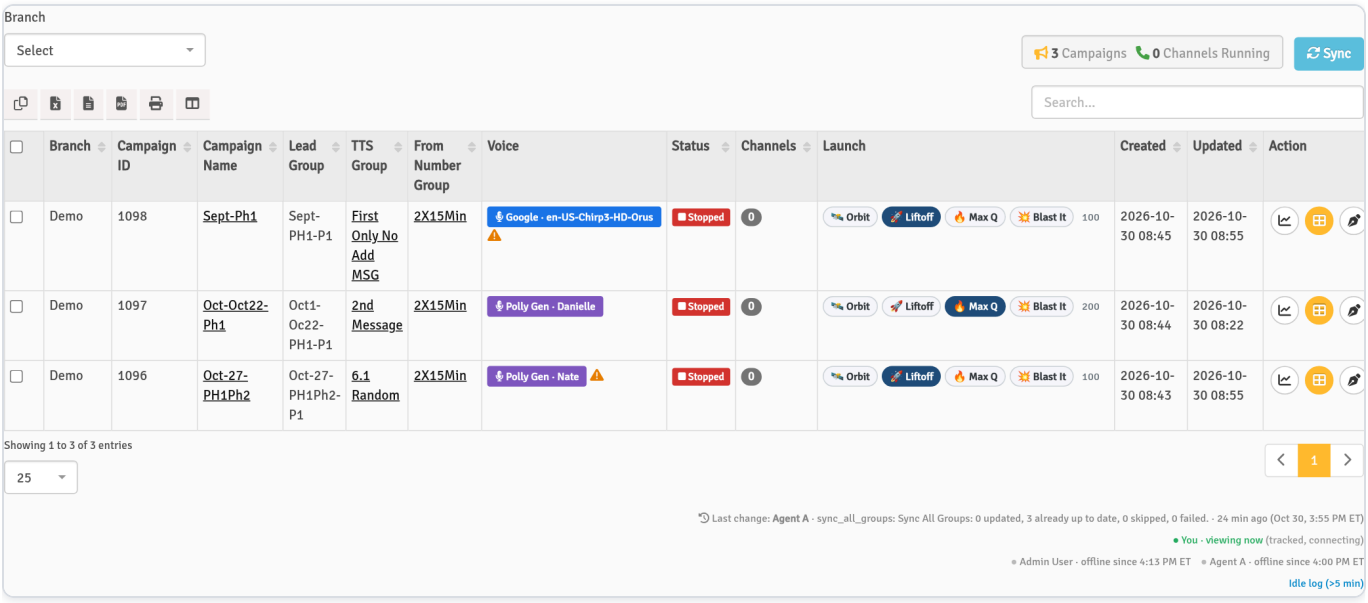
- Keep the computer awake and the webphone tab open for your whole shift.

- After an update notice, press `Ctrl` + `F5` once, between calls, to load the new version.
- Use a wired headset. Avoid Bluetooth and personal VPNs.
- If the caller cannot hear you, check the microphone permission (padlock in the address bar → Microphone → Allow).

4. The Campaign Management page

SUPERVISORS ADMINS

Campaign Management is the control room. It has four tabs at the top (**Campaigns**, **Add Campaign**, **Change Log**, **States & Call Quality**) and, below the campaign list, the **Caller ID Health**, **Queue 4040 · Agents** and **Queue 4040 · On the way in** panels.



The Campaigns tab: counters, the Sync button, the campaign table, the Launch presets and the Last change and presence lines

4.1 The campaign table

Column	Meaning
Campaign ID / Campaign Name	Click the name to open the campaign overview.
Lead Group, TTS Group, From Number Group	The lead list, message scripts and caller ID group the campaign uses. Click the TTS or From Number group name to see what is in it.
Voice	The voice in use. An orange ⚠ means the portal and the dialer disagree on the voice; edit and save the campaign so they match.
Status	The campaign's current status, for example Running or Stopped.
Channels	Calls in progress now.
Launch	Channel presets (see 4.3) and the current maximum channels.
Created / Updated	When the campaign was made and last changed.
Action	Round icon buttons (see below).

Action buttons

Icon	Name	What it does	Needs

📈	Campaign Report	Opens call reports for this campaign in a new tab.	view
▦ (orange)	View & Config	Opens the Campaign Overview & Configuration window.	view
✎	Edit	Opens the Edit Campaign form.	edit
⏸ / ▶	Pause Campaign / Start Campaign	Pause shows on running campaigns; Start shows on stopped ones. Both ask you to confirm.	edit
+	Add Test Number	Adds a high-priority test call (running campaigns only, see section 12).	edit
🗑️	Delete	Deletes the campaign. Ask your admin before deleting.	delete

Counters and lines under the table

- **Campaigns** and **Channels Running** counters at the top right.
- **Last change:** who made the latest change, what it was and when (ET). It refreshes every 20 seconds and flashes orange when something new happens.
- Your own status line ("You · viewing now") and, for admins, other users' presence (see section 11).

4.2 Start, pause and stop a campaign

1. Find the campaign in the list.
2. To start: click ▶ **Start Campaign** and confirm **Yes, start it!**
3. To pause: click ⏸ **Pause Campaign** and confirm **Yes, pause it!** The dialer stops making new calls.
4. To stop completely: open **View & Config** and click the red **STOP** button.
5. Check the **Status** column and the **Last change** line.

4.3 Launch presets: setting channels fast

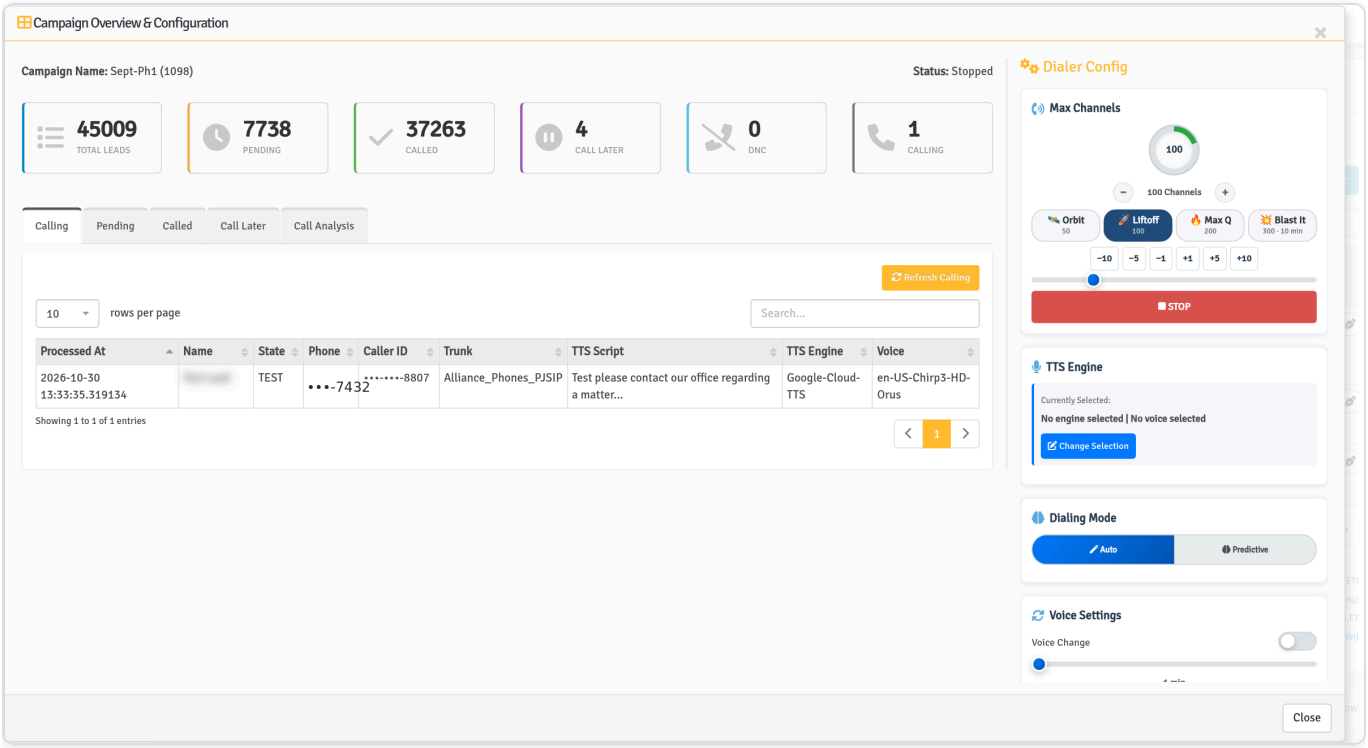
The **Launch** column sets the campaign's maximum simultaneous calls with one click. The active preset is dark blue.

Preset	Max channels	Notes
🛰️ Orbit	50	Gentle start.
🚀 Liftoff	100	Normal pace.
🔥 Max Q	200	High pace.
💥 Blast It	300 for 10 minutes	Asks you to confirm, shows a countdown, then drops back to 200 (Max Q) by itself. Tap again to add 10 minutes.

> **Good to know**
>
> Presets never go above your branch's channel limit. Moving the channel slider or step buttons, or pressing STOP, cancels a running Blast It.

4.4 Campaign Overview & Configuration

Click **View & Config** (or the campaign name) to open this window.



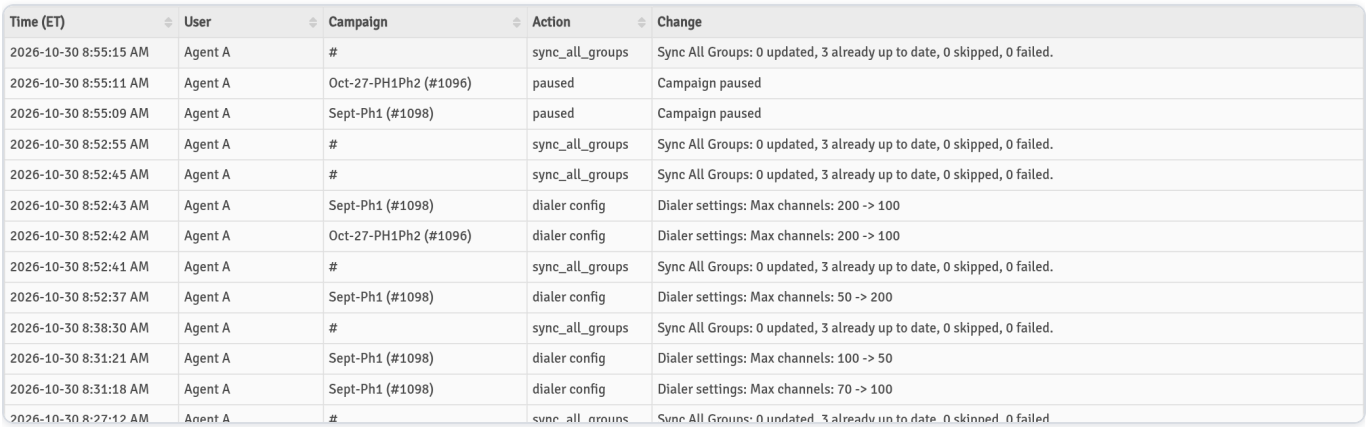
Campaign Overview & Configuration: totals, call lists and the Dialer Config side panel

- **Totals:** Total Leads, Pending, Called, Call Later, DNC, Calling.
- **Tabs: Calling**, **Pending**, **Called**, **Call Later** (each with search and refresh) and **Call Analysis** (hourly performance, status distribution, call attempts, caller ID performance, engine and voice performance, ASR, ACD).
- **Dialer Config panel:** Max Channels (gauge, – / +, the four presets, −10…+10 steps and a slider), STOP, TTS Engine (**Change Selection** → **Apply Selection**), Dialing Mode (**Auto** / **Predictive**), Voice Settings (automatic voice change and its interval) and Retry Settings (Max Retry and Retry Interval).

> **These controls save instantly**
>
> Every slider, toggle and button in the Dialer Config panel changes the live campaign the moment you use it. Every change is written to the Change Log with the before and after value, for example “Max channels: 200 → 150”.

4.5 The Change Log

Open the **Change Log** tab to see every campaign action: create, edit, delete, start, stop, pause, resume, test numbers, Sync and dialer setting changes. Columns: **Time (ET)**, **User**, **Campaign**, **Action**, **Change**. Click **Refresh** to update.

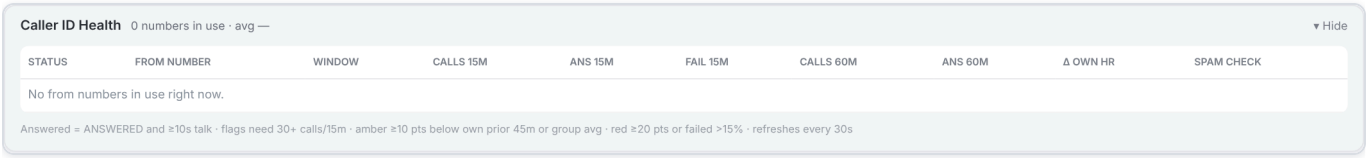


Time (ET)	User	Campaign	Action	Change
2026-10-30 8:55:15 AM	Agent A	#	sync_all_groups	Sync All Groups: 0 updated, 3 already up to date, 0 skipped, 0 failed.
2026-10-30 8:55:11 AM	Agent A	Oct-27-PH1Ph2 (#1096)	paused	Campaign paused
2026-10-30 8:55:09 AM	Agent A	Sept-Ph1 (#1098)	paused	Campaign paused
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.

The Change Log tab (user names replaced)

4.6 Caller ID Health

Click the **Caller ID Health** bar to show or hide it. For each caller ID in use it shows calls, answer rate and failures for the last 15 and 60 minutes, and the change against that number's own previous hour. Status reads **Healthy**, **Slipping**, **Drop** or **Low vol**. **Scan** runs a spam-reputation check (Clean, Flagged, Blocked). A number that is slipping *and* flagged shows ⚠ **Swap this number**. The panel refreshes every 30 seconds and opens by itself when a number turns bad.

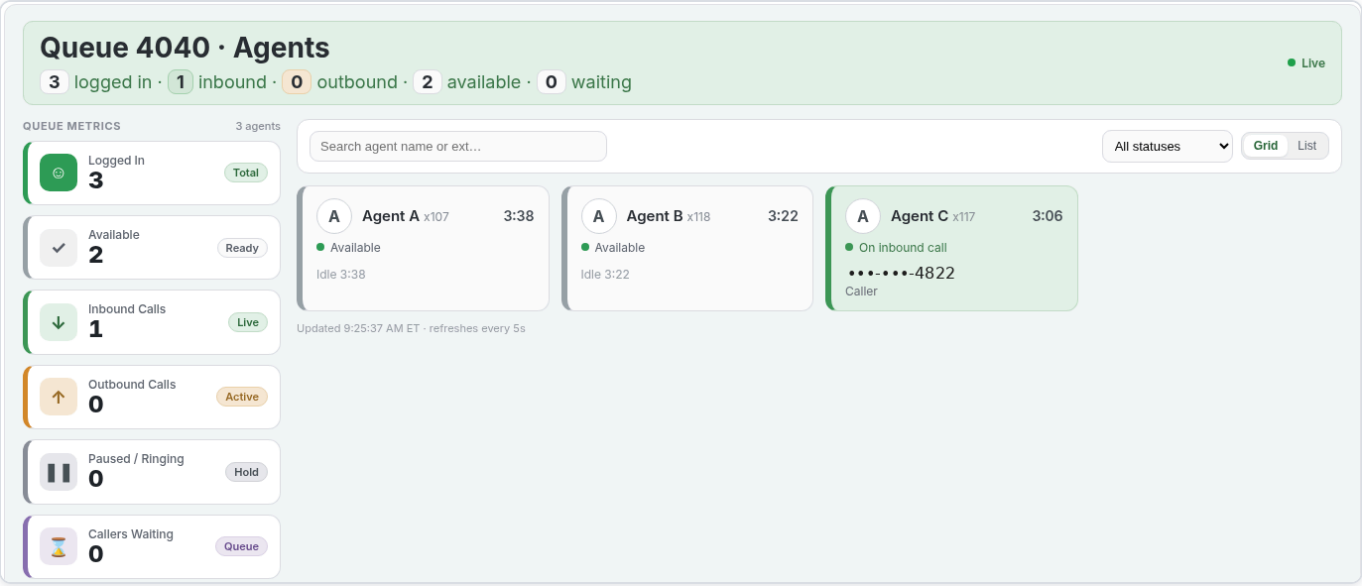


Caller ID Health (no numbers in use when captured)

5. The Queue 4040 agent panel

SUPERVISORS ADMINS

Queue 4040 is the inbound queue that receives callbacks and transfers. The **Queue 4040 · Agents** panel on Campaign Management shows every agent logged in to it, live. It refreshes every 5 seconds and the timers tick every second. The green ● **Live** dot shows the data is current.



Queue 4040 · Agents in Grid view (sample agents)

5.1 Header counts

The header line reads: **logged in · inbound · outbound · available · waiting**. The inbound pill is green, outbound is orange, the others are white.

5.2 Metrics sidebar

Card	Counts	Badge
Logged In	All agents in the queue	Total
Available	Agents ready for a call	Ready
Inbound Calls	Agents on an inbound call	Live
Outbound Calls	Agents on an outbound call	Active
Paused / Ringing	Agents ringing, paused or busy	Hold
Callers Waiting	Callers waiting in the queue	Queue

Tip: click a card to show only those agents. Click it again to show all.

5.3 Color-coded agent cards

Card color	Status shown	Extra detail on the card
Green	On inbound call	Caller number and name, time on the call
Orange	On outbound call	Number dialed, time on the call
White, grey edge	Available	Idle time
Grey	Ringing / Paused / Busy	“Incoming from queue…” while ringing

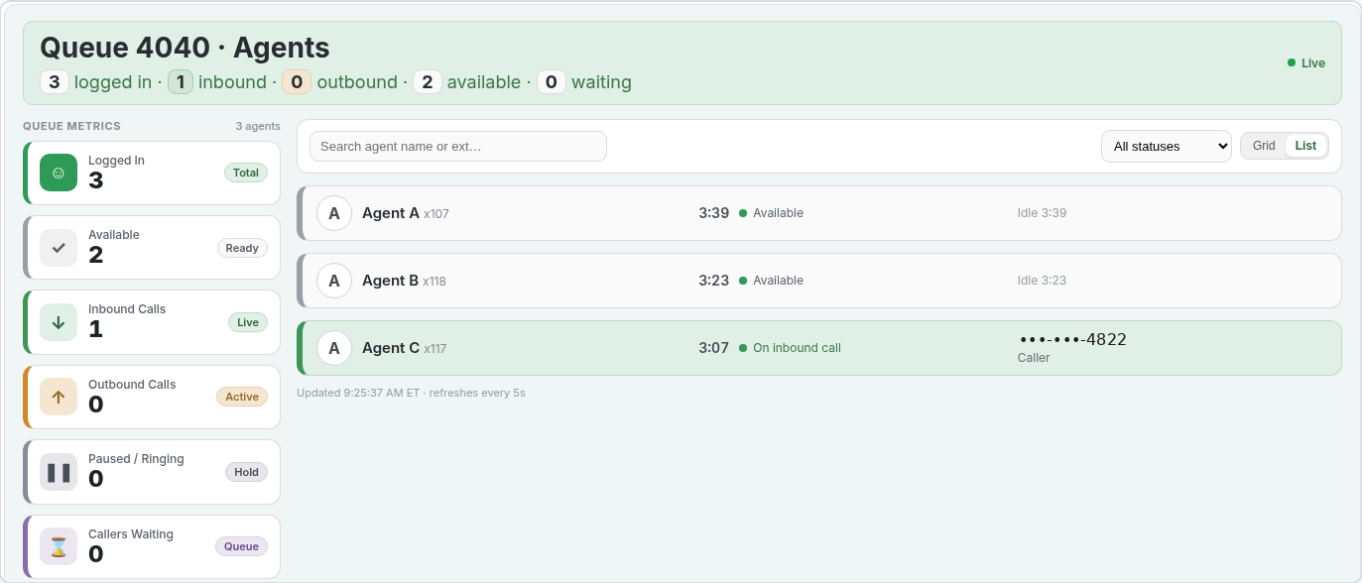
Each card shows the agent's initial, name, extension (for example *x107*) and a timer for the current state.

5.4 Search and filter

1. Type a name or extension into **Search agent name or ext...** to narrow the cards.
2. Use the status list: **All statuses**, **Available only**, **Inbound calls**, **Outbound calls**, **Paused / ringing**.
3. “No agents match this filter.” means nobody fits. Clear the search or choose All statuses.

5.5 Grid and List views

Use the **Grid** / **List** switch at the top right. Grid shows cards side by side. List shows one agent per row, which is easier to scan on a busy floor. On narrow screens the sidebar moves above the cards.



Queue 4040 · Agents in List view (sample agents)

5.6 Queue 4040 · On the way in

Directly below, this panel shows callers **In announcement** (hearing the greeting) and **Waiting to be answered (in queue / ringing)**, so supervisors see calls before they reach an agent.

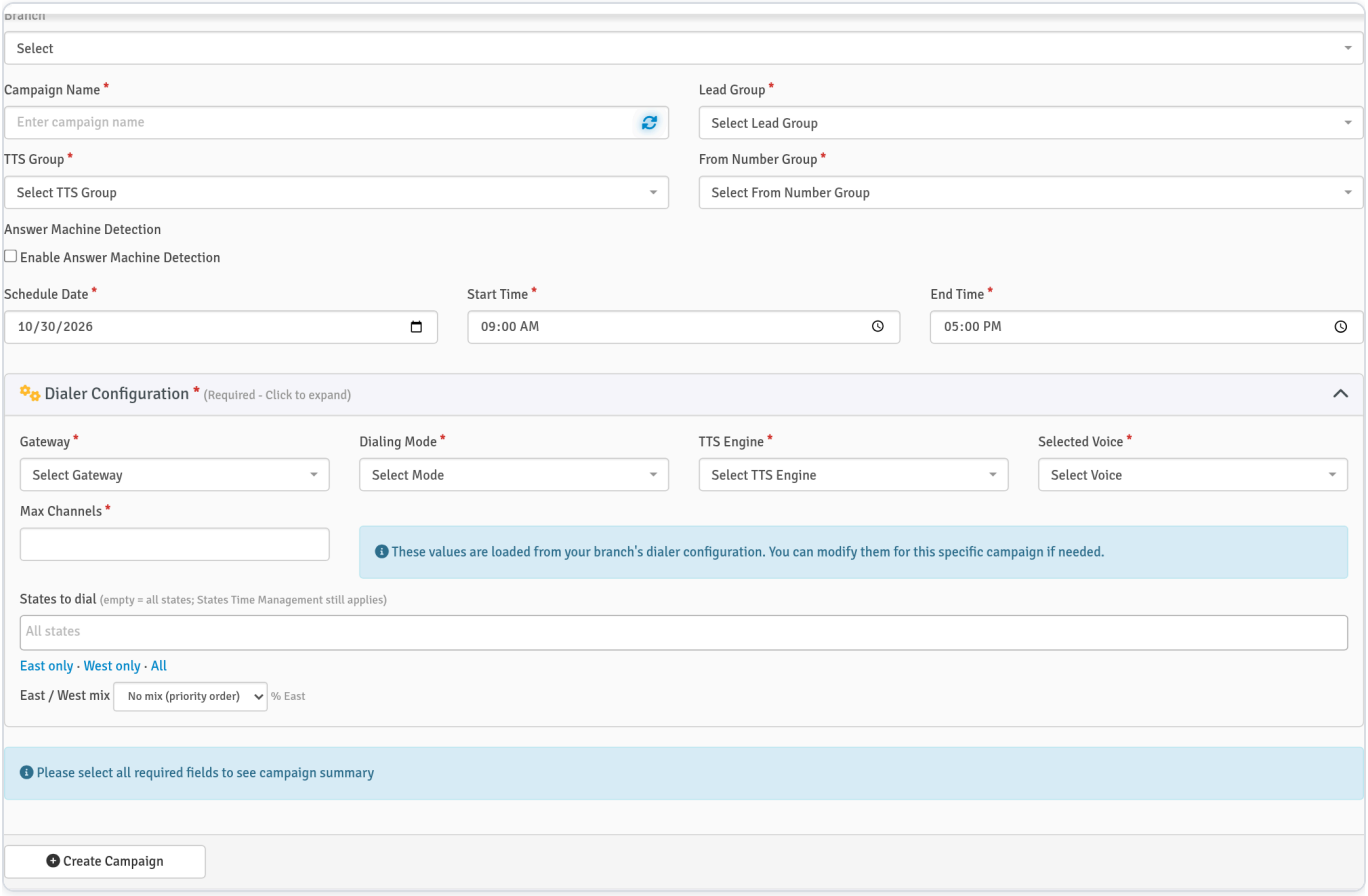
6. Creating and editing a campaign

ADMINS SUPERVISORS

6.1 Before you start

- The lead list is imported (section 8).
- A caller ID group exists with active numbers (section 10).
- A TTS group with approved scripts exists in **TTS Management**.
- Your state calling hours are set in **States Time Management**.

6.2 Create a campaign



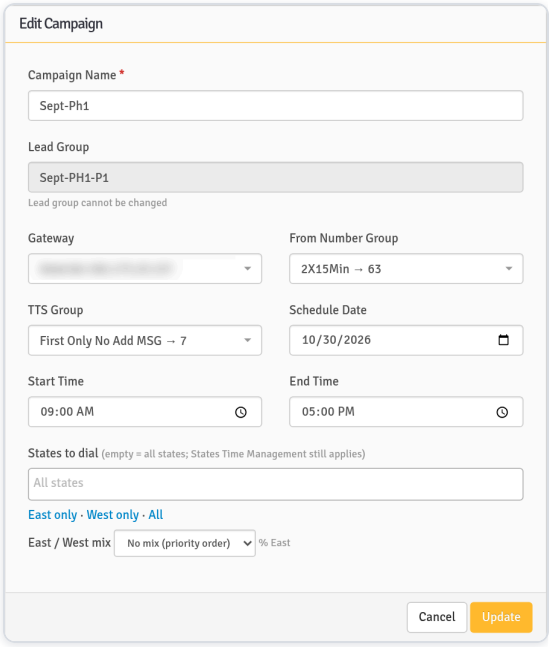
Add Campaign with the Dialer Configuration section expanded

1. Go to **Campaign Management** → **Add Campaign**.
2. Type a **Campaign Name**, or click the round arrows in the box to generate one.
3. Pick the **Lead Group**, **TTS Group** and **From Number Group**.
4. Tick **Enable Answer Machine Detection** if you want it.

5. Set the **Schedule Date**, **Start Time** and **End Time** (defaults: today, 09:00 to 17:00).
6. Click **Dialer Configuration** to expand it (required). Choose the **Gateway**, **Dialing Mode** (Auto Dialing or Predictive Dialing), **TTS Engine**, **Selected Voice** and **Max Channels**. Values are pre-filled from your branch defaults.
7. Optional: choose **States to dial** and an **East / West mix** (section 7).
8. Read the summary box, then click **Create Campaign**. New campaigns start **stopped**.
9. Run a test call (section 12), then start the campaign.

6.3 Edit a campaign

1. Click the ✎ **Edit** icon on the campaign row.
2. Change the name, gateway, from number group, TTS group, schedule date, start and end time, or the states and mix.
3. The **Lead Group** cannot be changed. To dial a different list, create a new campaign.
4. Click **Update**. The change appears in the Change Log.
5. If you changed the TTS or caller ID group of a running campaign, press **Sync** (section 9).



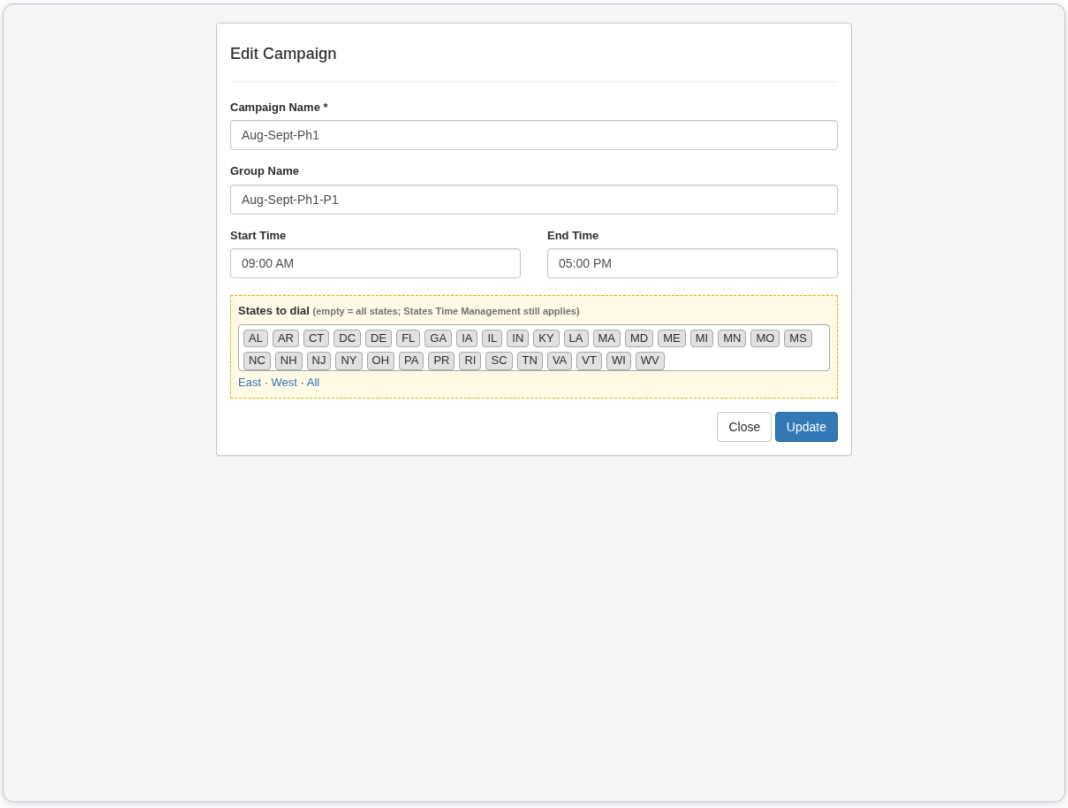
Edit Campaign (gateway name hidden)

7. States to dial and the East/West mix

ADMINS SUPERVISORS

7.1 Choosing states

The **States to dial** box in Add and Edit Campaign limits a campaign to the states you pick. **Empty means all states.**



States to dial with states selected as chips

1. Click inside the box and pick states, or use the shortcuts under it: **East only**, **West only** or **All**.
2. Remove a state by clicking its chip again.
3. Save the campaign (**Create Campaign** or **Update**).

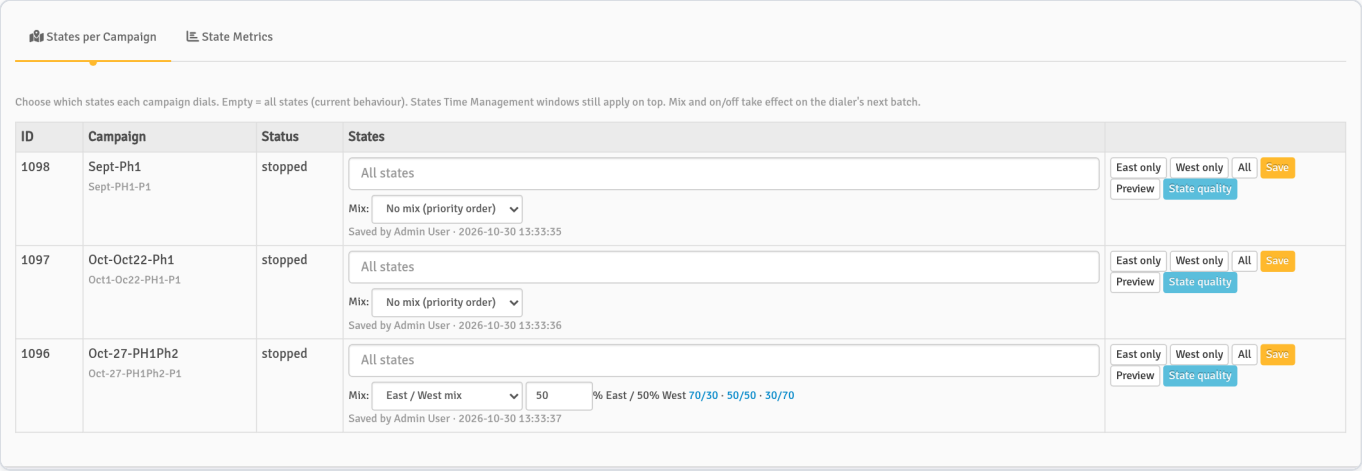
Region	States
West (19)	AK, AZ, CA, CO, HI, ID, KS, MT, ND, NE, NM, NV, OK, OR, SD, TX, UT, WA, WY
East	Every other state, plus DC and the supported territories

7.2 The East / West mix

A mix sets what share of each batch of leads comes from the East. Choose **No mix (priority order)** to dial in normal order, or **East / West mix** and type the **% East**. The rest is West. Quick links set 70/30, 50/50 or 30/70.

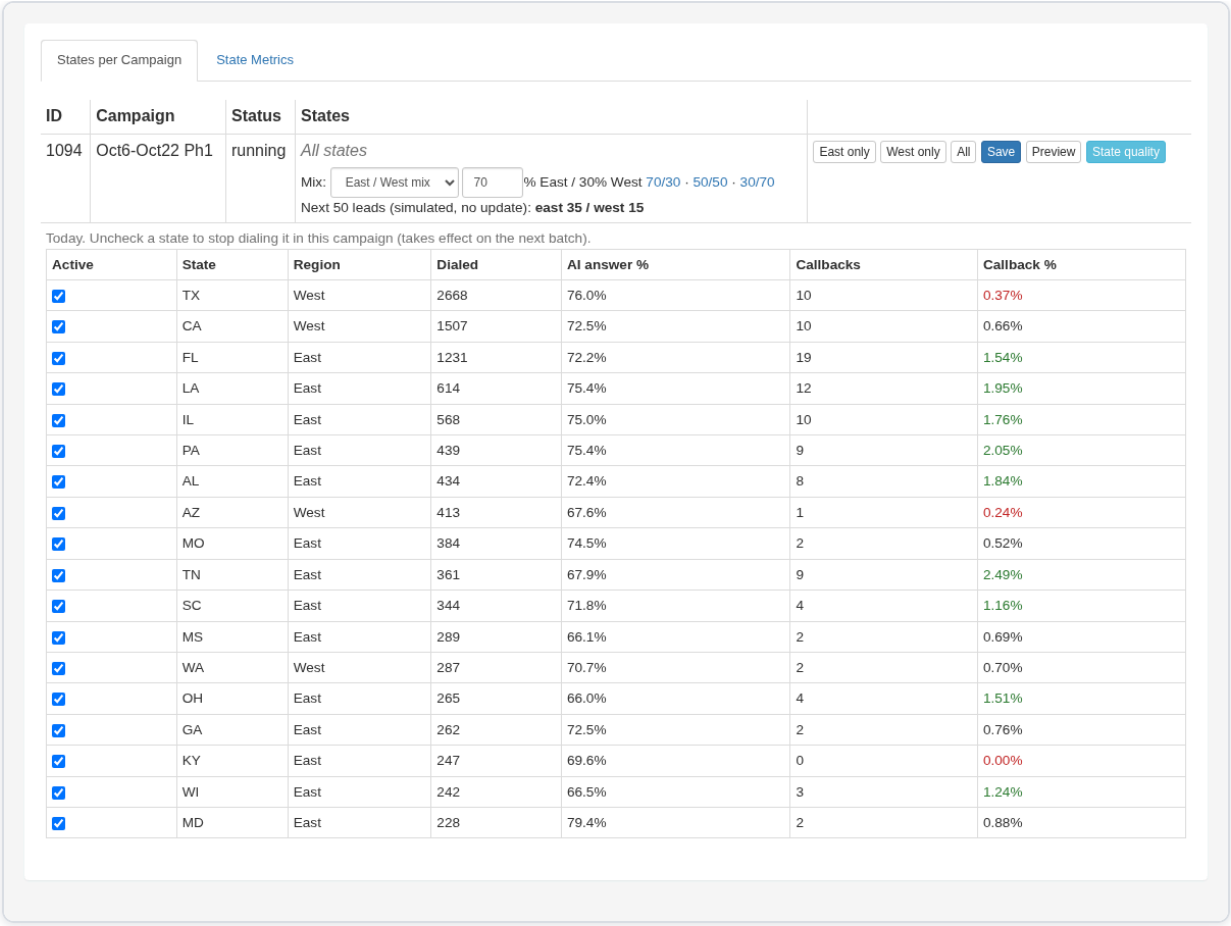
How a batch is filled: East leads up to the East share, then West up to the West share, then any remaining room from East, then from West. A mix never dials the same lead twice.

7.3 States & Call Quality tab



States per Campaign: states, mix and buttons for each campaign

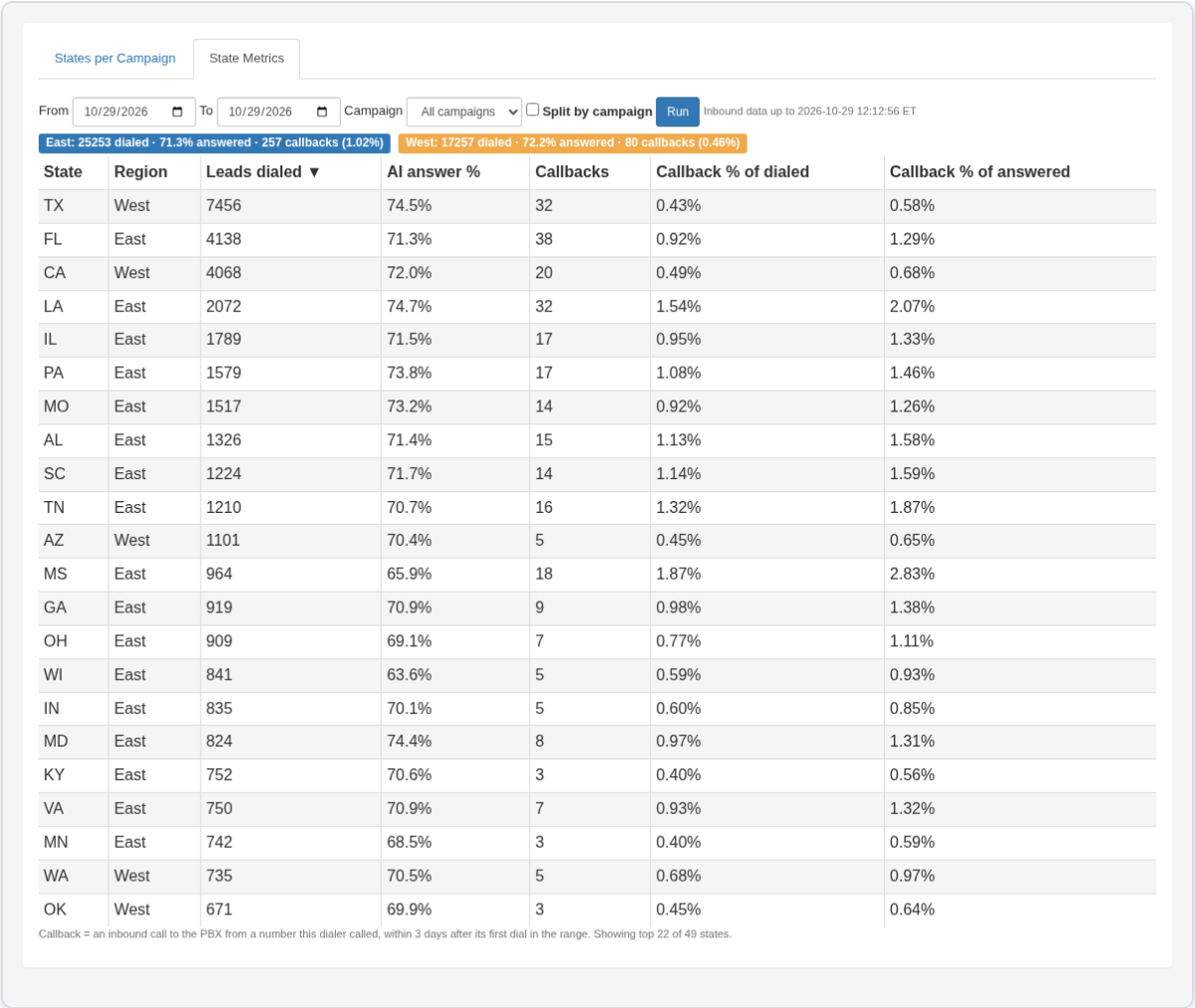
1. Open **Campaign Management** → **States & Call Quality**.
2. For each campaign, pick states and the mix, then click **Save**. “Saved by … · time” confirms it.
3. Click **Preview** to see how many leads are dialable now and how the next batch would split. Preview changes nothing.
4. Click **State quality** to see each state's dialed count, AI answer %, callbacks, callback % and pending leads.
5. To stop dialing a weak state, untick it in the **Active** column. It takes effect on the dialer's next batch and is logged in the Change Log.



State quality: untick a state to stop dialing it (preview data)

7.4 State Metrics

The **State Metrics** tab compares states over a date range. Set **From** and **To**, pick a campaign or All campaigns, optionally tick **Split by campaign**, and click **Run**. The blue and orange chips give East and West totals. A **callback** is an inbound call from a number this dialer called, within 3 days after its first dial in the range.



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, top states)

Rules that always apply

- State calling hours in **States Time Management** still apply on top of your selection.
- When you pick specific states, only leads whose state matches are dialed. Leads with a missing or misspelled state are skipped, so clean the state column before import.
- Unticking a state in State quality never blocks leads that have no state.
- To undo, clear the states box (= all states) and set the mix to No mix.

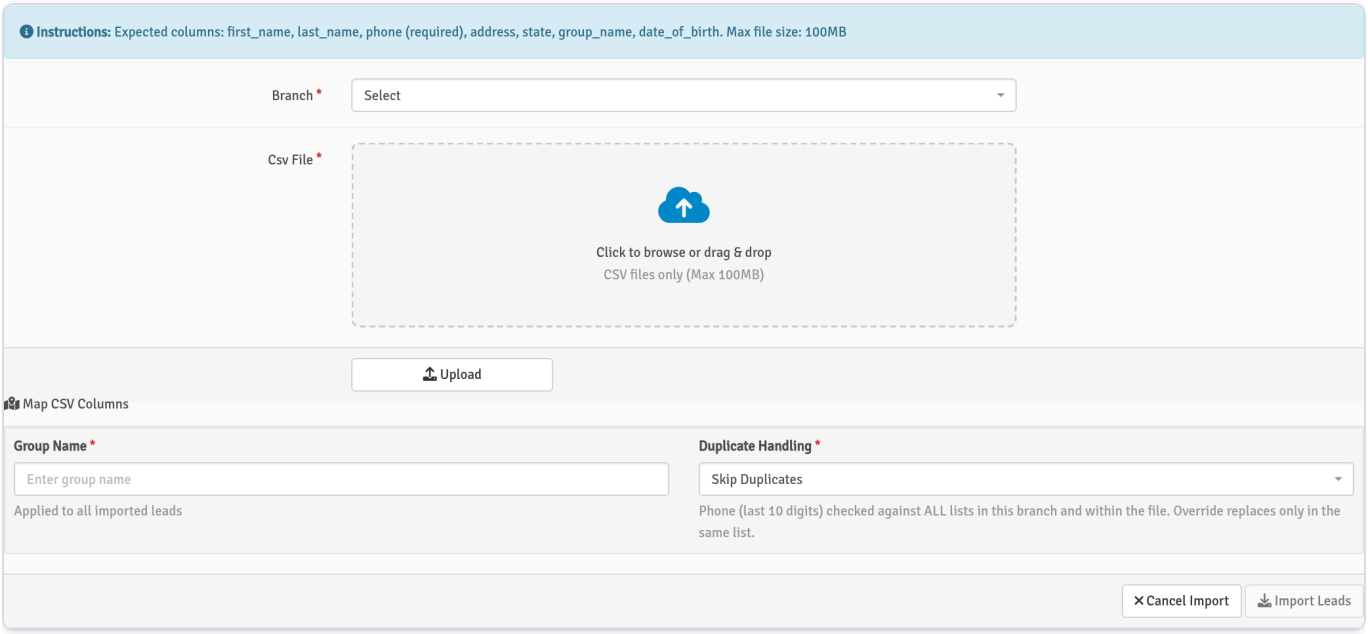
8. Importing leads

ADMINS

8.1 Prepare the file

- CSV format, up to 100 MB.
- Columns: `first_name`, `last_name`, `phone` (required), `address`, `state`, `group_name`, `date_of_birth`.
- Phone numbers: 10 to 15 digits, no plus sign.
- **One list (group) per file.** A file with more than one group name is rejected.
- Use two-letter state codes so state targeting works.

8.2 Import step by step



Import Leads: upload, then group name and Duplicate Handling (shown together here)

1. Go to **Lead Management** → **Import Leads**.
2. Choose the branch if asked, then click the upload box (or drag the file onto it) and click **Upload**.
3. In **Map CSV Columns**, match each column in your file to a lead field.
4. Type the **Group Name**. It is applied to every lead in the file.
5. Leave **Duplicate Handling** on **Skip Duplicates** (recommended).
6. Click **Import Leads** and keep the tab open. The progress bar shows Processed, Imported, Duplicates and Errors.

7 When it finishes, the **Skipped rows report** offers a download. Click it to get a CSV of every skipped row, the reason and the list where that phone already exists.

8.3 How the duplicate check works

> **Phone-only check**
> Duplicates are found by **phone number only**, using the last 10 digits, so 1-XXX-XXX-1234 and XXX-XXX-1234 are the same number. Names and addresses are not compared. Every list in your branch is checked, and so is the file itself.

Option	What happens to a duplicate phone
Skip Duplicates (default)	The row is not imported and appears in the skipped-rows report.
Override Duplicates	If the phone is already in the **same** list, that row is replaced. If it is in a **different** list, the row is still skipped. Override never deletes leads from another list.

Leads already loaded before this check existed may still contain the same phone in two lists. Avoid running two campaigns at the same time on lists that overlap.

9. The Sync button

SUPERVISORS ADMINS

Campaigns read their voices and caller ID numbers from groups. When you change a TTS group or a caller ID group, running campaigns need to pick up the change. **Sync** does that for all of them at once.

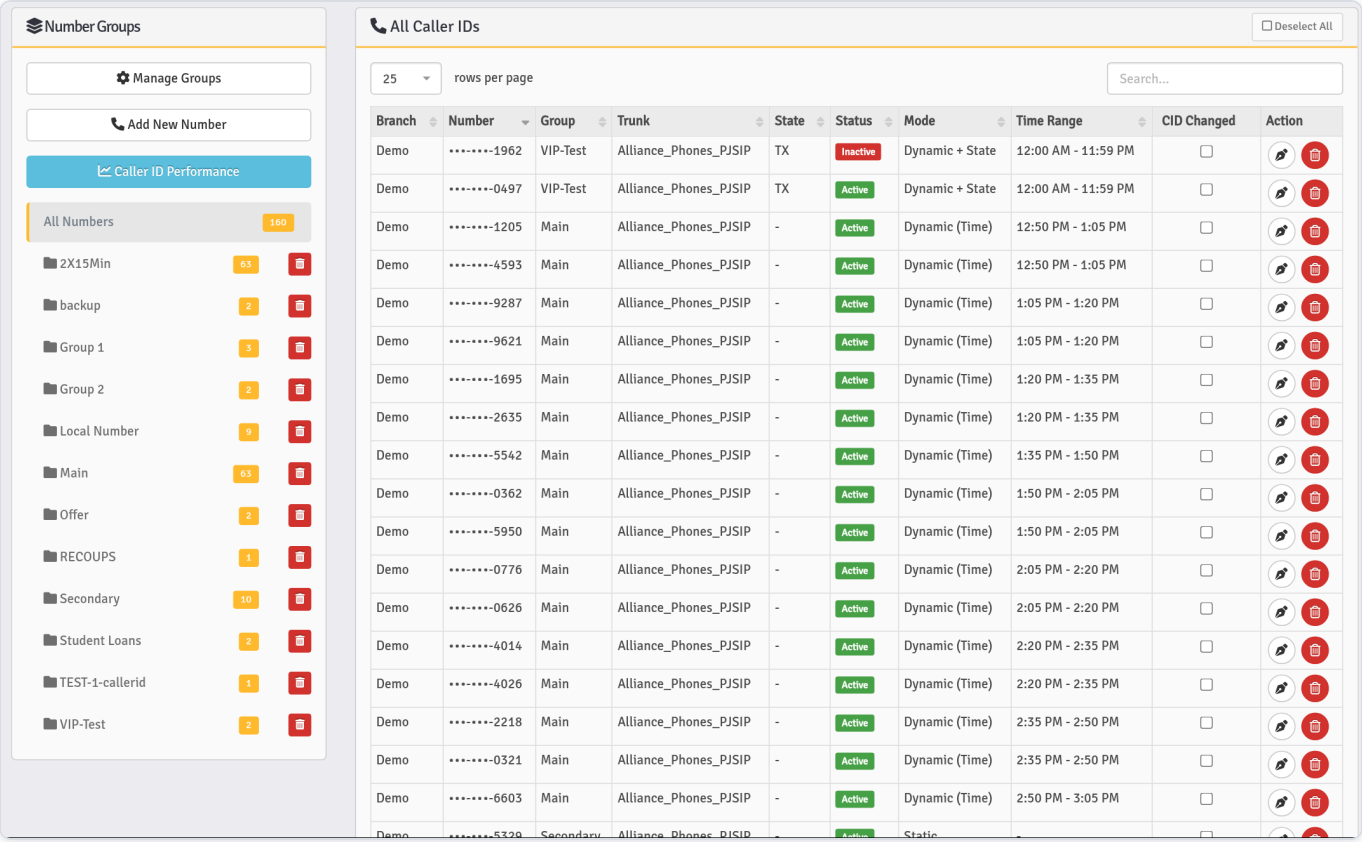
1. Make your change in **TTS Management** or **Caller ID Management**.
2. Go to **Campaign Management**.
3. Click the blue **Sync** button at the top right. Hovering shows: “Syncs voice and caller ID groups for all active campaigns in your branch”.
4. A “Syncing…” window appears and always closes within 60 seconds with the result, for example “0 updated, 3 already up to date, 0 skipped, 0 failed”.
5. The sync is recorded in the Change Log.

> **If you see a permission message**
> “You don't have permission to sync, or your session expired” means your login timed out or your role lacks edit rights. Press Ctrl+Shift+R, log in again, and ask your admin if it continues.

10. Caller ID number groups

ADMINS

Caller IDs are the numbers people see when the dialer calls. They are organised into **number groups**, and each campaign uses one group (its **From Number Group**).



Caller ID Management: Number Groups on the left, All Caller IDs on the right (numbers shortened)

10.1 Add a caller ID

1. Go to **Caller ID Management** and click **Add New Number**.
2. Enter the **Number**: exactly 11 digits (for example 1 plus the 10-digit number).
3. Pick the **Group** and the **Trunk**.
4. Optional: one **State** for state matching (leave empty for all states).
5. Choose the **Mode** (below), set the time window if needed, and save.

Mode	Meaning
Static	No time or state restrictions. The number can be used any time.

Dynamic (Time-based)	Used only inside its Start Time to End Time window. Use this to rotate numbers through the day.
Dynamic + State Check	Time window plus state matching: used for leads in its state during its window.

10.2 Manage groups

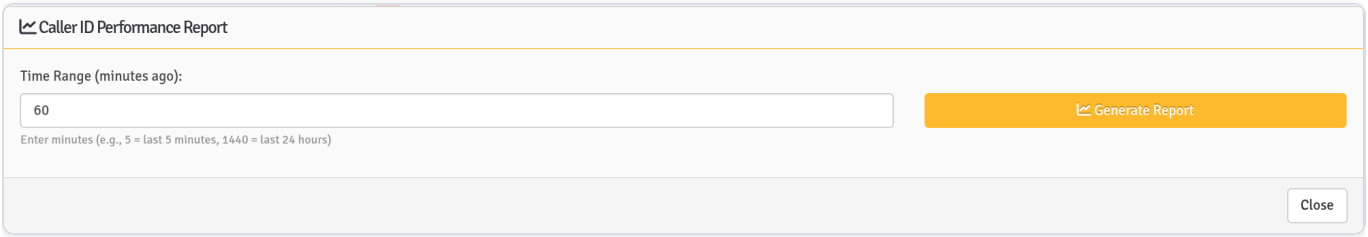
- **Manage Groups** opens the group list where groups are managed. The list on the left shows each group with its number count; click a group to filter the table.
- Use only numbers your company owns or is authorised to use.

10.3 CID Changed flags

Tick **CID Changed** on a number to flag it, for example to keep track of numbers your team has changed. The box *saves instantly*. **Deselect All** unticks every ticked box shown, after you confirm.

10.4 Caller ID Performance report

Click **Caller ID Performance**, enter a time range in minutes (5 = last 5 minutes, 1440 = last 24 hours) and click **Generate Report** to see total calls, answered, ASR % and ACD for each number.



Caller ID Performance Report

11. Idle detection and your status line

AGENTS SUPERVISORS ADMINS

11.1 Your own status line

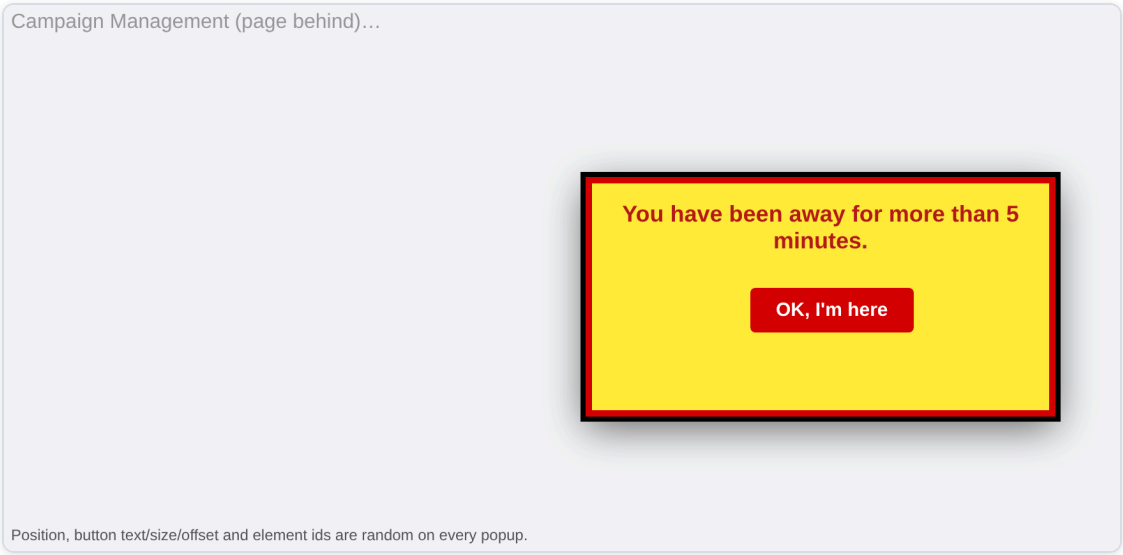
Everyone who opens Campaign Management sees their own status under the campaign list. Green **“You · viewing now (tracked)”** means the page is open and active. Orange **“You · away N min — this page tracks activity”** appears when the tab is hidden or idle.



The self-status line, active (top) and away (bottom)

11.2 The idle popup (after 5 minutes)

If a non-admin user has the Campaign Management page visible and there is no mouse, keyboard, scroll or touch activity for **5 minutes**, a bright yellow-and-red box appears: *“You have been away for more than 5 minutes.”*



The idle popup

1. Click the button in the box (for example **OK, I'm here**) with your mouse.
2. The box closes and the idle time is logged.

The box appears in a random place with a different button each time, and only a real click closes it.

11.3 What admins see

- **Presence:** other users' lines, for example “● Agent A · viewing now”, “away/idle N min” or “offline since 4:00 PM ET” (no signal for 90 seconds).
- **Idle log (>5 min):** the link under the presence lines lists each idle event for your branch: user, idle from (ET), popup time, back at (ET), duration, and whether it was dismissed by a real click. A row without an end time means the page was closed or the popup is still showing.



Last change line and presence as an admin sees them (names replaced)

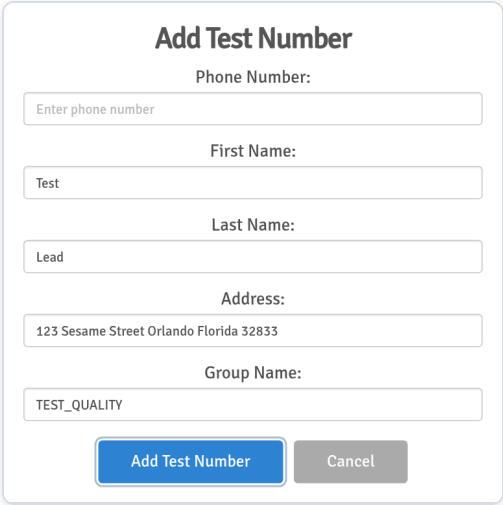
> **Use it to coach**
> Check idle events against breaks, lunch and call time before acting on them.

12. Making a test call

SUPERVISORS ADMINS

A test number puts one call to your own phone at the front of a running campaign, so you can hear the voice, the script and the caller ID before the real list dials.

1. Make sure the campaign is **running**. The **+ Add Test Number** icon only appears on running campaigns.
2. Click **+ Add Test Number** on the campaign row.
3. Enter your own **Phone Number**. Keep or change First Name, Last Name, Address and Group Name (all fields are required).
4. Click **Add Test Number**. You see “Test number … added successfully with high priority”.
5. Answer your phone and check the message, the voice and the number on your caller ID.
6. The test is recorded in the Change Log.



Add Test Number

If the test call does not come

- Test leads are saved with the state **TEST**. A campaign limited by **States to dial** filters them out. Test on a campaign set to all states, or clear the states for the test.
- The call still has to be inside the campaign's start and end time and your calling-hour rules.
- Check the campaign's **Calling** tab in View & Config.

For a first test of a brand-new campaign, set **Max Channels** low (for example 2) and stop the campaign after the call.

13. Quick reference

I want to...	Go to
Get ready for calls	Webphone → click the red button until it is green
Turn off DND	Webphone gear → Do Not Disturb (untick)
Transfer a caller to the queue	Transfer → 4040
See who is on calls	Campaign Management → Queue 4040 · Agents
Change call pace	Campaign row → Launch presets, or View & Config → Max Channels
Start or pause dialing	Campaign row → ▶ / ⏸
Limit a campaign to some states	Edit → States to dial
Split dialing East/West	States & Call Quality → Mix → Save
Stop dialing a weak state	States & Call Quality → State quality → untick
Import a list without duplicates	Lead Management → Import Leads → Skip Duplicates
Apply a voice or caller ID group change	Campaign Management → Sync
See who changed something	Last change line, or the Change Log tab
See who was idle	Campaign Management → Idle log (>5 min)
Make a test call	Running campaign → + Add Test Number

13.1 Troubleshooting

Problem	Try this
Webphone stays red	Click it; then gear → Refresh Registration; check the network; tell your admin.
Phone does not ring when the tab is hidden	Allow notifications for the webphone site.
No audio	Allow the microphone (padlock → Microphone → Allow); check the headset; turn off VPN.
Old screens after an update	Ctrl+F5 once between calls.
Signed out unexpectedly	Close extra webphone tabs and register again.
Sync shows a permission message	Log in again; ask your admin to check your role.
Test call never arrives	See the box in section 12.

13.2 Glossary

Term	Meaning
Branch	One client company in the platform, with its own users, leads and campaigns.
Channel	One simultaneous outbound call.
Queue 4040	The inbound queue that receives callbacks and transfers.
TTS	Text-to-speech: the synthetic voice that reads the message script.
ASR / ACD	Answer-seizure ratio (answered ÷ attempted) / average call duration.
AMD	Answer machine detection.
DND	Do Not Disturb. Agents should not use it.