



PREDICTIVE DIALER AND REMOTE AGENT SETUP GUIDE

RELEASE 7

VOICENT AGENTDIALER™

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OVERVIEW

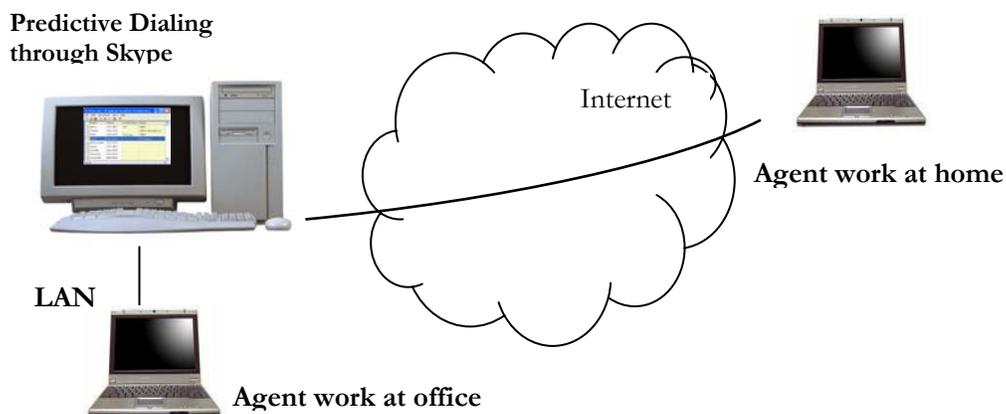
Voicent AgentDialer is a state-of-the-art predictive dialer that you can rely on for your telemarketing campaigns. Besides many traditional predictive dialing features, the tool offers the following key improvements:

1. VOIP Predictive Dialing

No need for physical phone lines, Dialogic board, or voice modem. Calls are made through [SIP](#) or [Skype](#).

2. Remote Agent

Agent can work at home or office. Calls are forwarded to agent's computer over the internet or local area network.



A typical predictive dialing session is that AgentDialer makes calls to clients on a call list; once a call is answered by a live human, the call is transferred to an available agent; on the agent's computer, an alert window (screen popup) pops up, and the agent can talk to the client right away. The screen popup should contain all the information about the client. The agent can take notes for the call in the same pop up window. Here are [predictive dialer demo videos](#).

Voicent AgentDialer also supports semi-automatic dialing. Using the semi-automatic mode, an agent can initiate a phone call, play a pre-recorded audio file, record the conversation, and transfer the call to another agent, all with a single mouse click.

INSTALL AND SETUP SERVER

Although supported by AgentDialer, use voice modems for predictive dialing is not recommended. It is more restrictive than VOIP, for example, modems require physical phone lines, so it won't work for at home agent. For the rest of this document, we only show steps that are related to setting up SIP or Skype for AgentDialer.

Please follow the **Quick Start Guide** to install Voicent Gateway and AgentDialer software. The Quick Start Guide can be opened from Windows Start Button > All Programs > Voicent. Here we present a short version of the steps.

1) Install Voicent Software

If you do not have the software CD, you can download the Voicent software package at: <http://www.voicent.com/download>

Follow the on screen instructions to install Voicent Gateway and AgentDialer

2) Setup SIP or Skype

Please see <http://www.voicent.com/sip> or <http://www.voicent.com/skype> for more instructions.

After you install SIP soft-phone or Skype, you should try to make a few phone calls to make sure it works.

3) Restart Voicent Gateway to connect to SIP or Skype

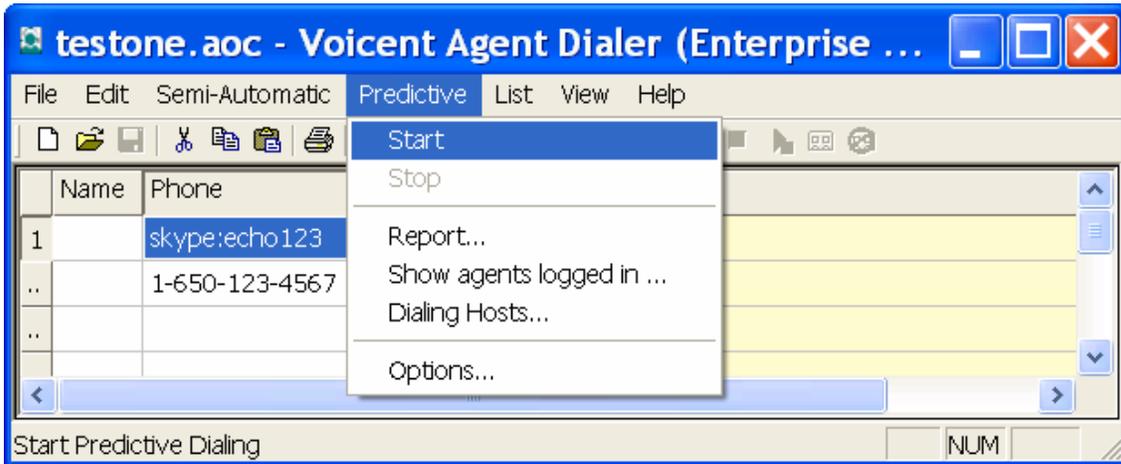
For more details, please see the *Quick Start Guide*.

Although both SIP and Skype should work for predictive dialing, **SIP offers much better audio quality for remote agent**.

TEST AGENT DIALER ON THE SERVER

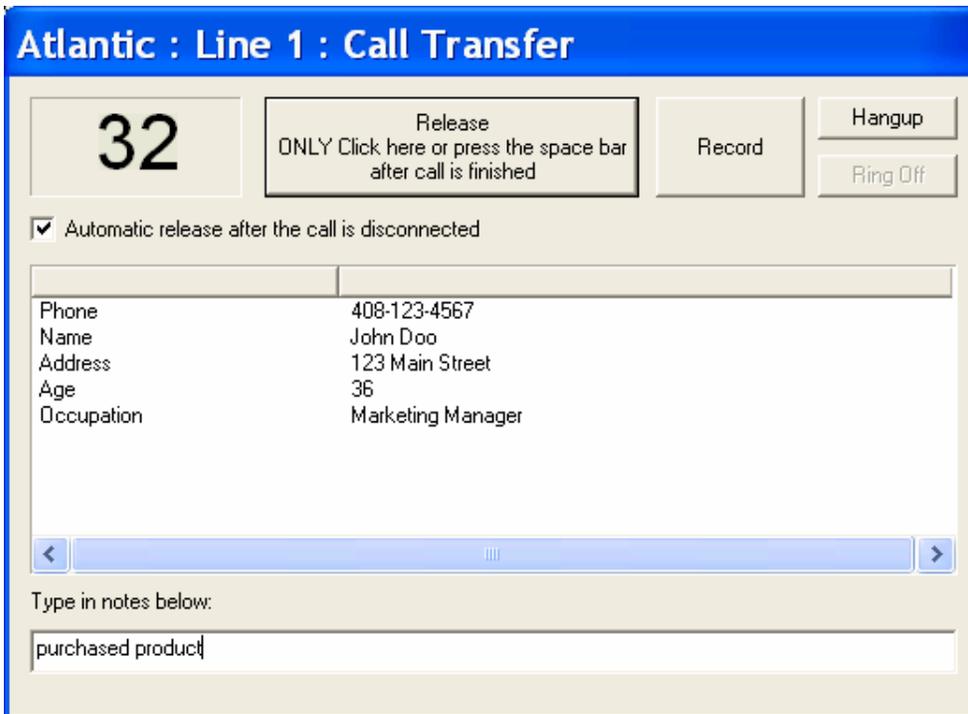
Open Voicent AgentDialer, enter phone numbers, such as your cell phone number, in the Phone column. Please note you need to specify 1 for US phone number, where 1 is the country code. (You could set the dialing rule to automatically add 1. Please set it from the *Outbound* tab under Voicent Gateway main menu > Setup > Options) To specify a SIP account, use *sip:* prefix, such as *sip:abc@mysipservice.com*. To specify a Skype account, please use *skype:* prefix, such as *skype:echo123*.

To start predictive dialing, please select **Predictive** from the program main menu, then select **Start**.



When your phone rings, answer the call and say "hello".

You should see the following popup screen:



Once you see this popup screen, the phone call is connected to the computer and is ready for conversation. If you selected "Automatic release after the call is disconnected", this dialog window will automatically close when either party hangs up the phone.

USE A BETTER HEADSET

It is very important to have a good quality headset for the phone call. A lot of cheap microphones catch background noises and generate static. If you experience poor audio quality during the call, the best thing to do is to use a better headset.

We recommend Creative HS-600 noise canceling headset. It is a Skype certified headset.



To fine tune the audio for the headset, please select Windows control panel > Sound and Audio Devices.

RUNNING MULTIPLE LINES

It is easy to run multiple SIP lines. All you need to do is specify the number of lines to use for your SIP account. Please note your SIP service provider must not have limit on the number of channels. For example, if you use sipphone.com, each account can only use 1 channel, thus you can only start one SIP line with one account. (1 channel limitation will also make call transfer fail)

If you use Skype, each running Skype instance acts as a single phone line. To have simultaneous calls, you must run multiple Skype instances ([an example](#)). Unfortunately Skype is limited to run only one instance under the same Windows user account. In order to run multiple Skype instances, you must set up multiple Windows user accounts. You can add a new Windows user from Windows Control Panel, under User accounts.

It is not recommended to use the same Skype user account for different Windows user accounts. If you anticipate heavy usage on your Skype account, please take a look at [Blocked Skype Account](#).

Windows Vista

Windows Vista is more restrictive in terms of security. You must do the following to start multiple Skype instances:

- 1) Switch to a different Windows user account
- 2) Run Skype, and sign in
- 3) Switch back (not logout) to the original Windows user account

- 4) If you have other Skype instance to run, repeat step 1-3 for a different Windows user account
- 5) Restart Voicent Gateway

Window XP

You can use the steps listed for Windows Vista to run multiple Skype instances. But since Windows XP is less restrictive than Vista, you can run multiple Skype instances under the same login session.

Select *Windows Start > Run...* Type in the following command

```
runas /user:username "C:\Program Files\Skype\Phone\Skype.exe"
```

where username is the Windows user account name

INSTALL REMOTE AGENT

If you have AgentDialer Enterprise Edition, you can let your agent answer the call from a remote location, such as a different office or even at home.

To turn off the screen popup on the server computer, please select Voicent Gateway **main menu > Setup > Options > Call Transfer**, then check the box labeled "Do not show popup window on this computer".

Install RemoteAgent Software

For agent works on a computer other than the server computer, you need to install the RemoteAgent software. To install, just run the Voicent installer, and on the first screen shown below, select **Client Programs**, click **Continue**. On the next screen, install RemoteAgent.



SETUP REMOTE AGENT ON THE SAME NETWORK

If the RemoteAgent is installed on a computer that is on the same local area network (LAN) as the server computer, then it is relatively easy to setup the RemoteAgent software.

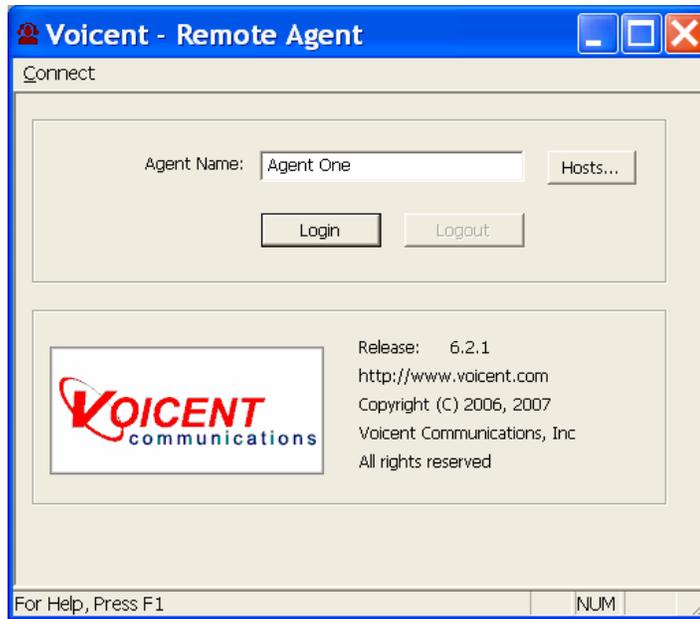
Click the RemoteAgent icon to run the program. Click the **Hosts...** button on the main window. From the *Voicent Gateway Servers* window, select *localhost*, then click the **Delete** button.



Click the **Add New...** button, from the *Add New Voicent Gateway* window, enter the server name or IP address. You can find this information on the gateway main window. Select "Auto connect when program starts". Click **Add**.

Agent Login

Agent must login to the gateway server in order to receive screen popup. To login, simply type in any name and click the **Login** button on the RemoteAgent main window. Now if you start predictive dialing, the agent on this computer will receive screen popup.



Troubleshooting

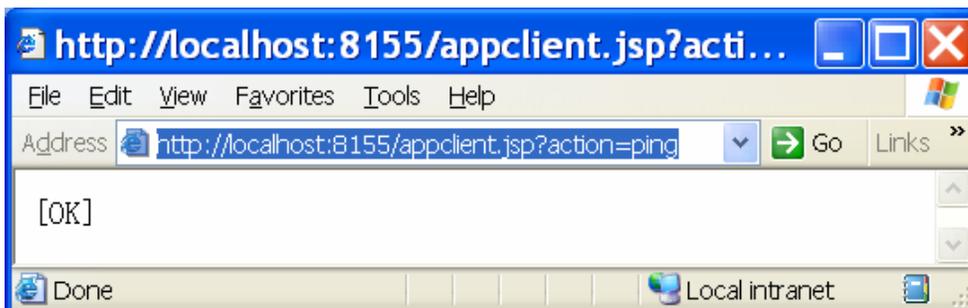
If login fails and Voicent Gateway is running, then the most likely cause of the problem is your firewall program. A firewall program can block the communication between Voicent Gateway and RemoteAgent. The troubleshooting tips are shown in the following section: Check your firewall program. More troubleshooting tips are described in the **Enterprise Edition Setup Guide**. You can access the document from Windows Start Button > All Programs > Voicent. Here we list a short version of the steps.

1) Make sure the gateway is running on the server

Please click the gateway icon to open it. Make sure the status is *Running*. If the gateway fails to start, please check the troubleshooting tips by selecting **Help > Troubleshooting...** from the program main menu, and take a look at topics labeled "Voicent Gateway is not running".

2) Test gateway connection using a browser on the server

Open your web browser, then type in the following address in the address bar: `http://localhost:8155/appclient.jsp?action=ping`



If you see the return as [OK], then Voicent Gateway is running and is ready to receive connections from remote computers.

3) Test gateway connection using a browser on the remote computer

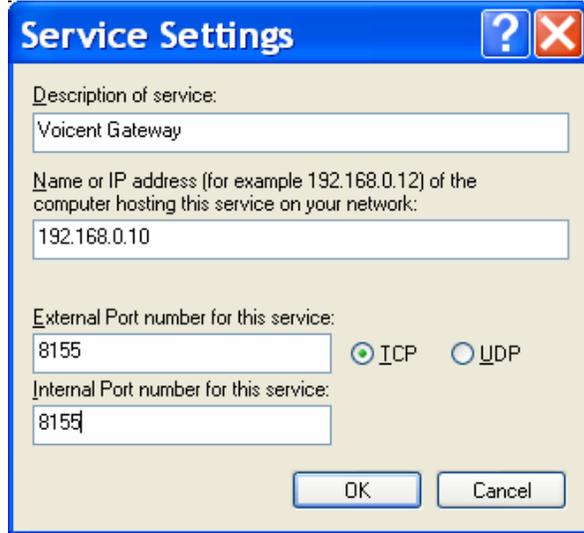
On the computer that you install RemoteAgent, open your web browser, the type in the same address as shown above. Please replace *localhost* to the IP address of the server computer.

CHECK YOUR FIREWALL PROGRAM

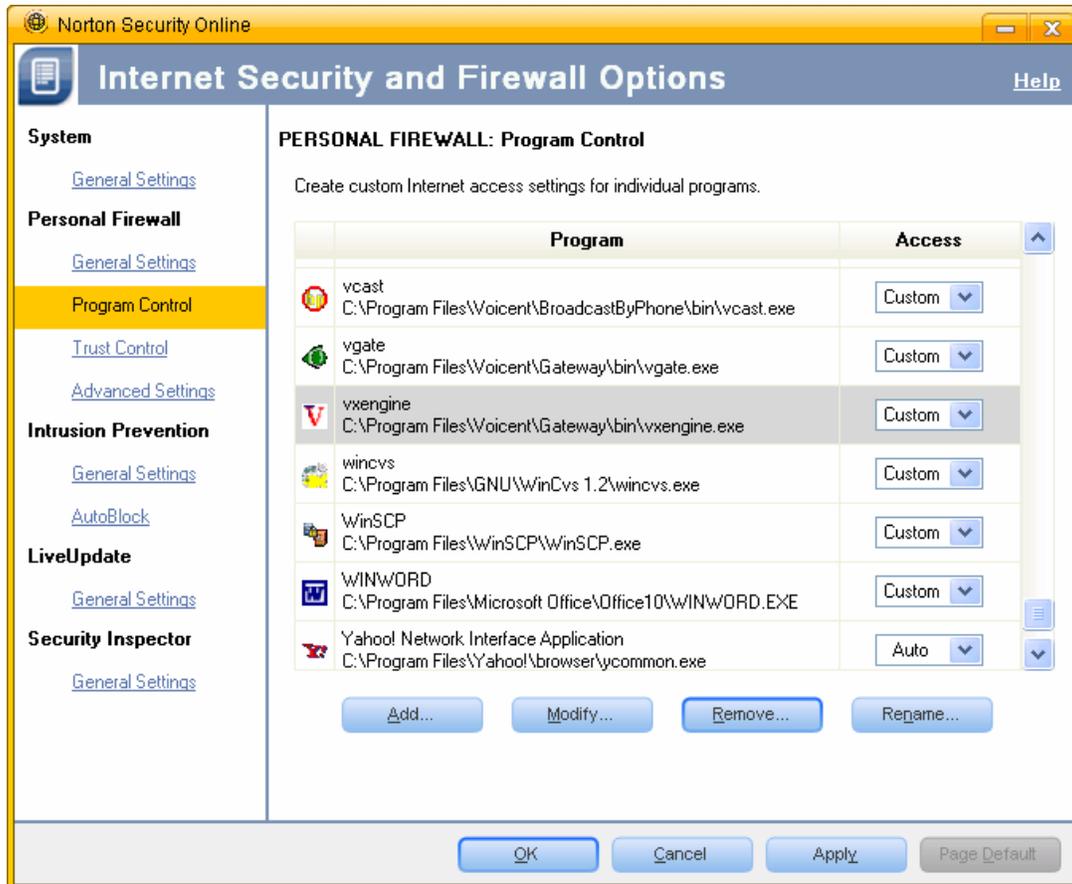
Windows XP and later operating systems provide a built-in firewall. Please make sure accessing Voicent Gateway is enabled. From Windows Control Panel, you can access **Windows firewall**, click on the **Advanced** tab, then

choose Local Area Connection, click on the **Settings...** button, then click the **Add...** button. Enter the service settings, and then click OK.

You must add gateway port **8155**, and remote agent port **8165** to the service settings. Once added, Windows firewall should unblock Voicent for the remote access.



Your computer usually have other anti-virus or firewall software installed (Norton, McAfee, etc). Please check the vendor's manual for instructions on how to unblock Voicent Gateway. For example, you can unblock Voicent gateway from Norton firewall program under its Internet Security and Firewall Options window as shown below.



The programs that need to be unblocked are: *vxengine.exe*, *spengine.exe*, *vgate.exe*, *adclient.exe*, and *javaw.exe*. These are the components of Voicent Gateway.

One way to test is to disable or uninstall the firewall program, and then install the software back when everything works.

SETUP REMOTE AGENT FROM THE INTERNET

It is somewhat complicated to access Voicent server software from the Internet. The setup normally involves configuring your firewall hardware or software. It does not involve configuring Voicent software. Voicent can not and will not provide support regarding issues related to your ISP or hardware providers. Please contact your ISP or your router/firewall provider for these issues. Another place to get help is your local computer service companies that provide onsite service.

For more information, please take a look at the ***Enterprise Edition Setup Guide***. Here is a shorter version of the setup steps.

- 1) It is generally a good idea to make sure the RemoteAgent software can access the gateway server from the same LAN. For details, please see the previous section. Once it is working from the LAN, then you know that the gateway is working, and it can be accessed from other computers.
- 2) The main issue is usually the router setup. The first thing you need to know is the IP address you can use to access the server computer. For example, suppose you have Voicent Gateway running in the office and your office has a router for internet connection. In order to access the server computer from home, you must know the IP address of your router. The router usually has two IP addresses, one address for outside access, and the other one for internal access. The outside address is also referred as WAN address and this is the address you need to know.

You can get this information from your ISP. When you call its technical support, please ask them which IP address you can use in order to access your router from outside.

- 3) You need to re-direct the router traffic for port **8155** (gateway port) and port **8165** (agent port) to the server computer. You need to set it up for your router. Once set, any new connection to these two ports will be routed to the correct computer. When you call your router company for help, simply ask them how to set up the router so you can access an application that listens on port 8155 and 8165.

- 4) It is normally a good idea to use a web browser to test the connection first. Please open your web browser from the remote computer (the computer you are going to run RemoteAgent), and type in the following:

`http://ip_address:8155/ applclient.jsp?action=ping`

where the `ip_address` is the one you get in step 2. If it is working, you should see the browser shows "[OK]"

If it is not working, you need to go back to step 2 and 3. Again, Voicent does not have information about these setup, you must contact your ISP and router for more help.

- 5) Setup RemoteAgent

From the RemoteAgent main window, click **Hosts...** button. Select *localhost* and click the **Delete** button. Then click the **Add New...** button. Enter the IP address you get in step 2, check the "auto connect when start" box, and click the OK button. This setup tells the RemoteAgent software how to connect itself to the gateway server.

Go back to the main window of RemoteAgent, type in any name, and click the **Login** button. Once login, you are ready to accept screen popups.

The Enterprise Edition Setup Guide can be accessed from Windows Start button > All Programs > Voicent.

USEFUL RESOURCES

More information can be accessed from Voicent's website.

For more product info: <http://www.voicent.com/support>.

For product purchase: <http://www.voicent.com/store>.

For developer info: <http://www.voicent.com/devnet>