

# VicidialNOW CE - Getting Started Guide – Draft

Date: 2009/04/23

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## Disclaimer:

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## About This Document:

This document describes how to install VicidialNow Community Edition and get you started in making your first call using VICIDIAL in manual/progressive mode. This document is not a complete manual for managing VICIDIAL. For more detailed documentation on how to use VICIDIAL you can purchase the official manuals from <http://www.eflo.net/store.php>

## What is VicidialNOW?

- VicidialNOW is a Linux Distro Base on CentOS 5 focused to be a full Call Center Suite System that just works.

## What is VicidialNOW's current stable release?

- VicidialNOW 1.2

## What are the major components that make up VicidialNOW?

- CentOS, a version of Linux related to a very well known Enterprise Linux (but without the branding and support).
- Astguiclient/VICIDIAL 2.0.5
- Asterisk 1.2.30.2, the core PBX
- vTigerCRM Open Source CRM system

## What are the default usernames and passwords ?

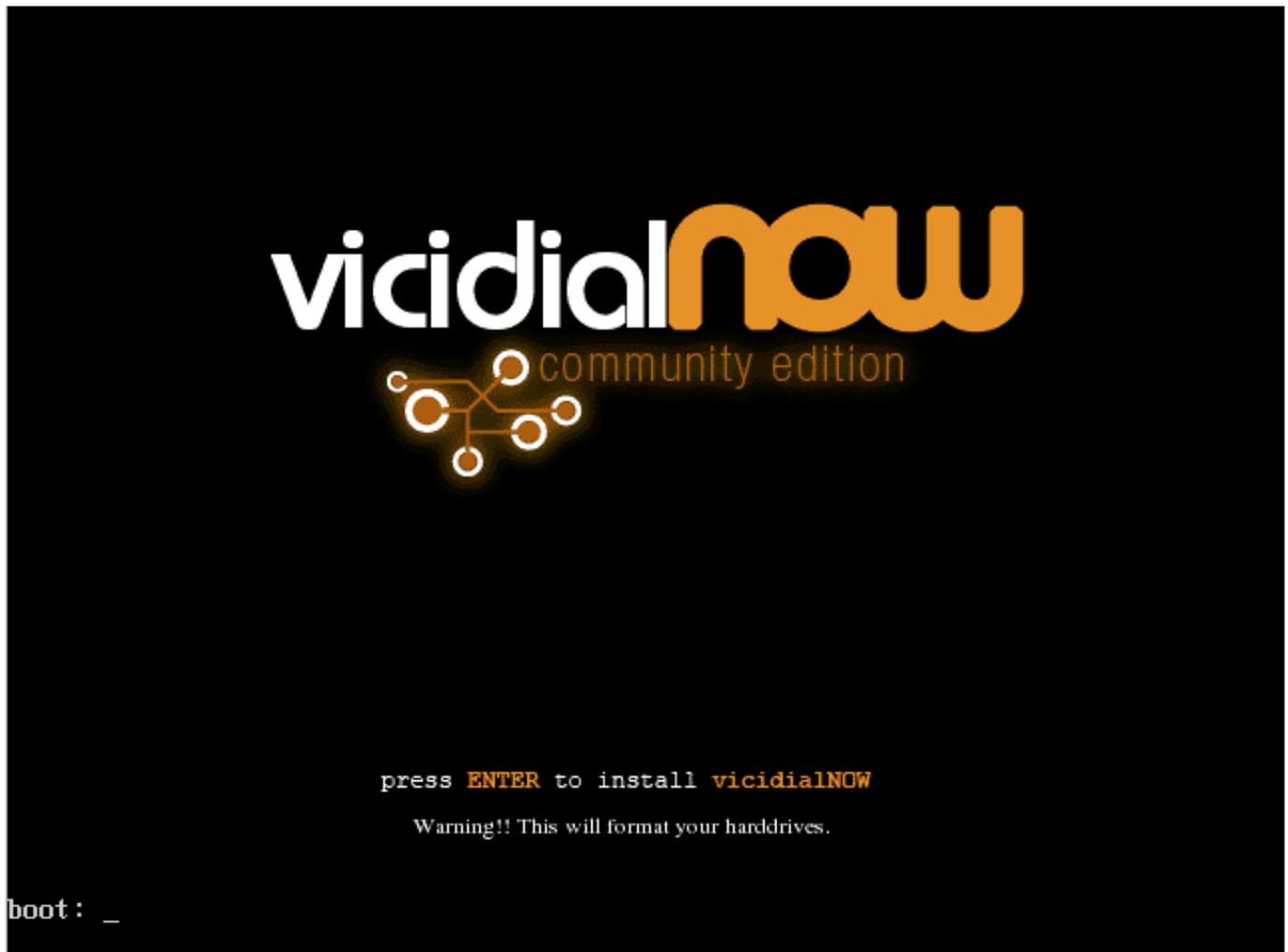
	Login	Password
Terminal/SSH	root	vicidialnow
MySQL (mysql -u root -p)	root	vicidialnow
vTiger - <a href="http://192.168.1.2/vtigercrm/">http://192.168.1.2/vtigercrm/</a>	admin	admin
Phone Login (SIP) - <a href="http://192.168.1.2/agc/vicidial.php">http://192.168.1.2/agc/vicidial.php</a>	100 upto 150	test
Phone Login (IAX) - <a href="http://192.168.1.2/agc/vicidial.php">http://192.168.1.2/agc/vicidial.php</a>	300 upto 350	test
SIP Phone Credentials	cc100 upto cc150	test
IAX Phone Credentials	cc300 upto cc350	test

## Requirements:

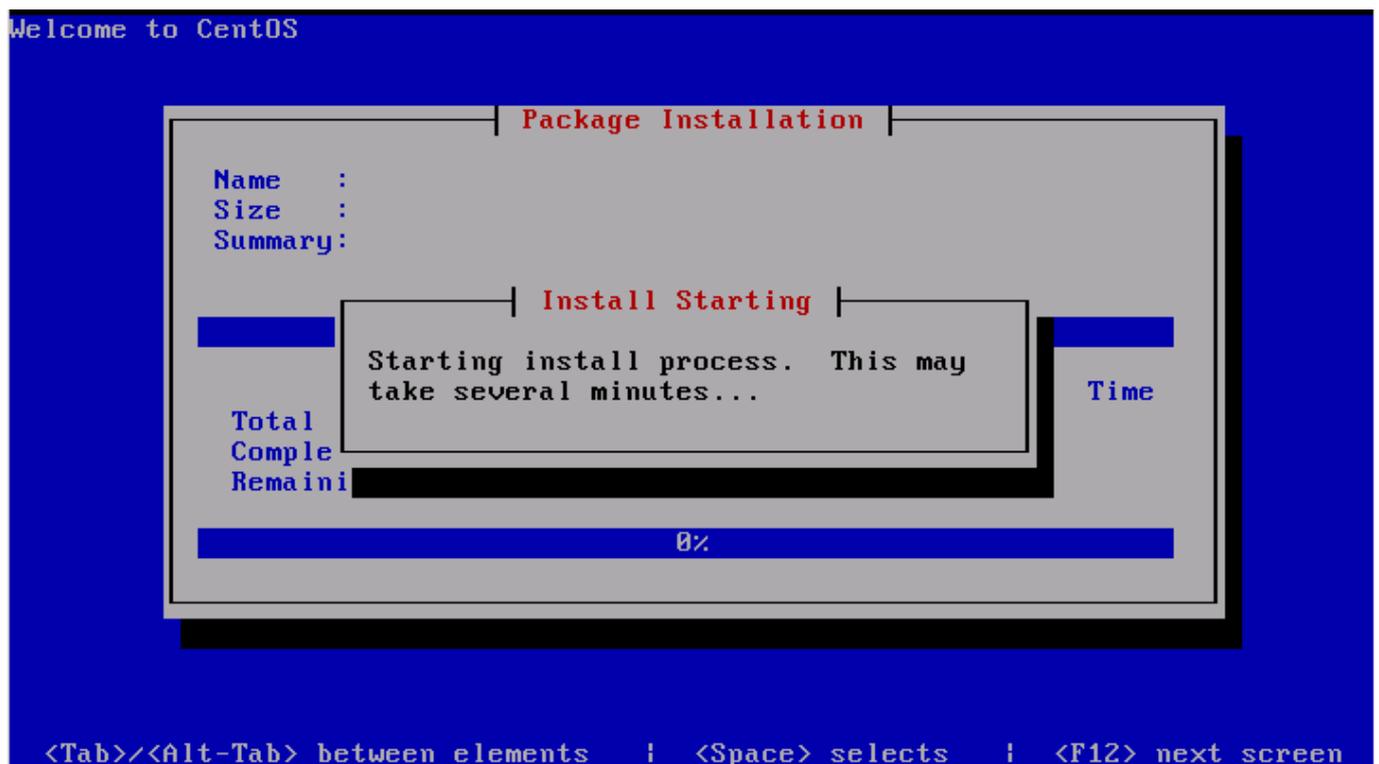
- Download the VicidialNow CE 1.2 final release from <http://www.vicidialnow.org/>
- Burn to CD using program like Nero on Windows or K3B on Linux and configure your server to boot from CD.

## Install the Base System:

Boot from your VicidialNow CD. Press <Enter> at the boot prompt:



The automated installer takes care of everything so you just need to wait for around 15 minutes depending on your hardware for the whole installation process to finish.

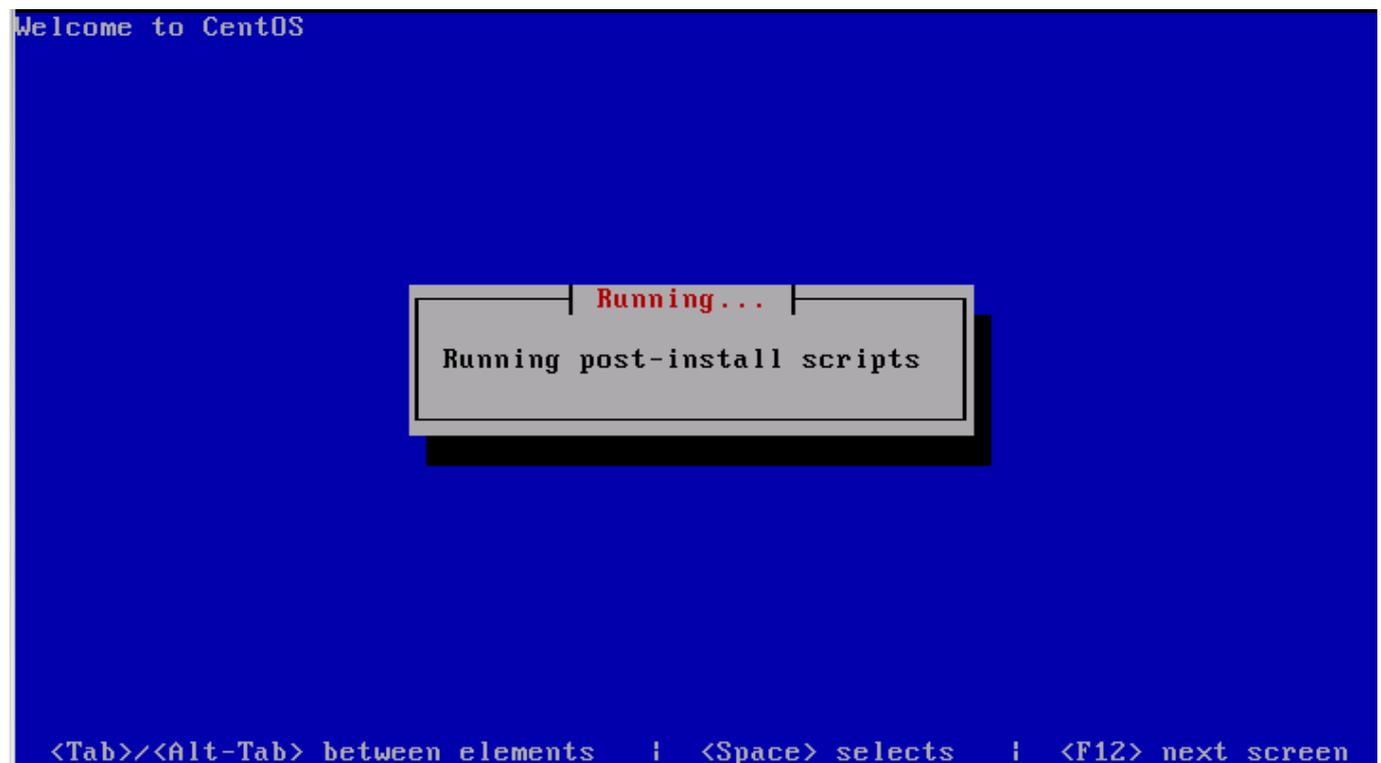




## Bootloader Installation:



## Running post-install scripts



Installation Complete! Press <Enter> and remove the installation CD.

Welcome to CentOS

**Complete**

Congratulations, your CentOS installation is complete.

Remove any media used during the installation process  
and press <Enter> to reboot your system.

**Reboot**

<Enter> to reboot

**Login using the following user account:**

*username: root*

*password: vicidialnow*

```
VicidialNOW Community Edition 1.2  
Kernel 2.6.18-92.el5.vnow on an i686
```

```
vici login: root  
Password: _
```

```
vici login: root  
Password:
```

```
Welcome to VICIDIALNOW!!!  
-----
```

```
For access to the VICIDIAL admin and agent web GUI use this URL:  
http://192.168.1.2
```

```
username: admin  
password: vicidialnow
```

```
For access to UtigerCRM use this URL:  
http://192.168.1.2/vtigercrm
```

```
username: admin  
password: admin
```

```
For professional support, visit http://www.vicidialnow.com  
-----
```

```
Don't forget to run update_server_ip everytime you change your IP address
```

```
[root@vici ~]# _
```

The default IP address of the VicidialNow CE 1.2 is 192.168.1.2 but there is no default gateway defined so you have to manually add the default gateway to have internet access, assuming the default gateway of your network is 192.168.1.1 you have to issue the following command:  
**route add default gw 192.168.1.1** , if you want the setting to be permanent you have to add the config to /etc/sysconfig/network-scripts/ifcfg-eth0

```
[root@vici ~]# netstat -rn
Kernel IP routing table
Destination      Gateway          Genmask         Flags         MSS Window  irtt Iface
192.168.1.0      0.0.0.0         255.255.255.0   U             0 0        0 eth0
169.254.0.0      0.0.0.0         255.255.0.0     U             0 0        0 eth0
[root@vici ~]# route add default gw 192.168.1.1
[root@vici ~]# netstat -rn
Kernel IP routing table
Destination      Gateway          Genmask         Flags         MSS Window  irtt Iface
192.168.1.0      0.0.0.0         255.255.255.0   U             0 0        0 eth0
169.254.0.0      0.0.0.0         255.255.0.0     U             0 0        0 eth0
0.0.0.0          192.168.1.1    0.0.0.0         UG            0 0        0 eth0
[root@vici ~]# ping www.google.com
PING google.navigation.opendns.com (208.67.219.230) 56(84) bytes of data:
64 bytes from google.navigation.opendns.com (208.67.219.230): icmp_seq=1 ttl=49
time=28.8 ms
64 bytes from google.navigation.opendns.com (208.67.219.230): icmp_seq=2 ttl=49
time=29.5 ms
64 bytes from google.navigation.opendns.com (208.67.219.230): icmp_seq=3 ttl=49
time=25.3 ms

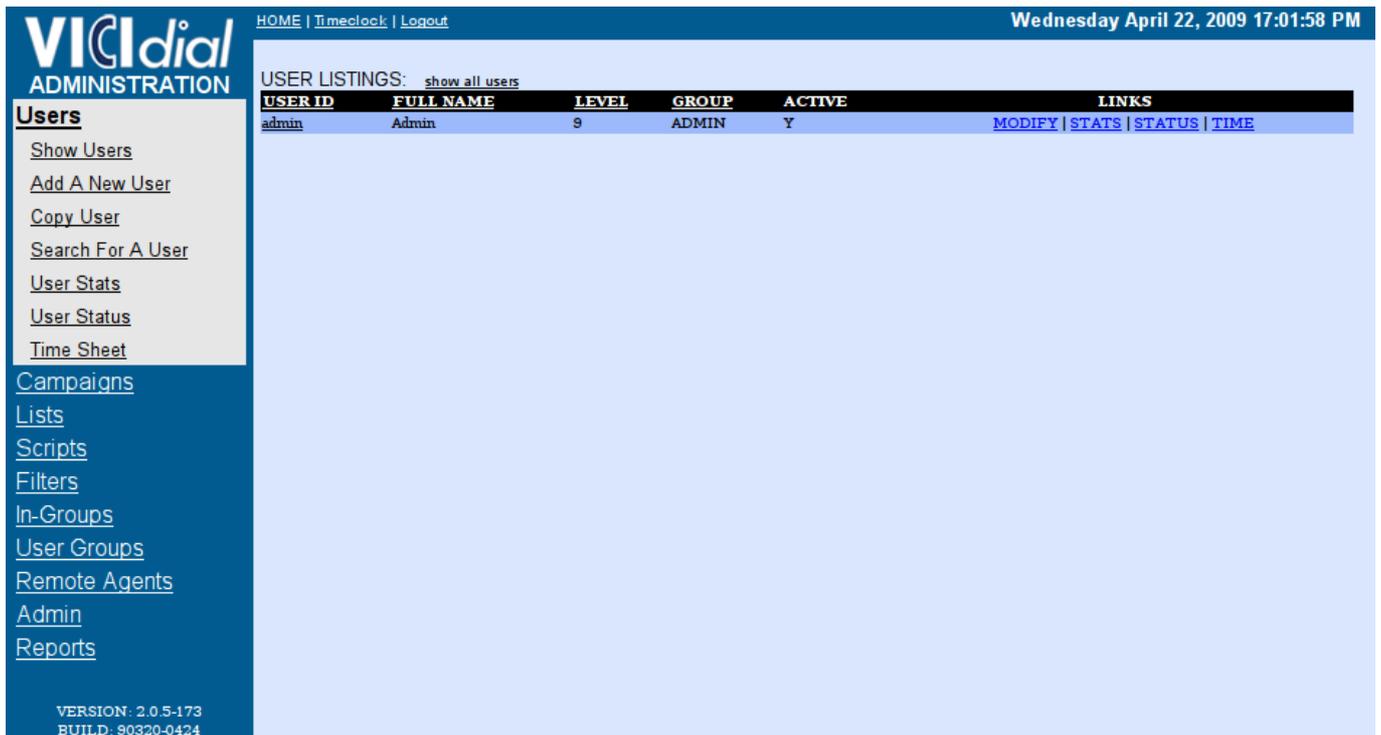
--- google.navigation.opendns.com ping statistics ---
3 packets transmitted, 3 received, 0% packet loss, time 2000ms
rtt min/avg/max/mdev = 25.397/27.936/29.588/1.827 ms
[root@vici ~]# _
```

Using Firefox or IE open <http://192.168.1.2/>

[» Agents Login](#) [» Manager's Login](#) [» CRM Login](#) [Get Support](#) [Community](#)



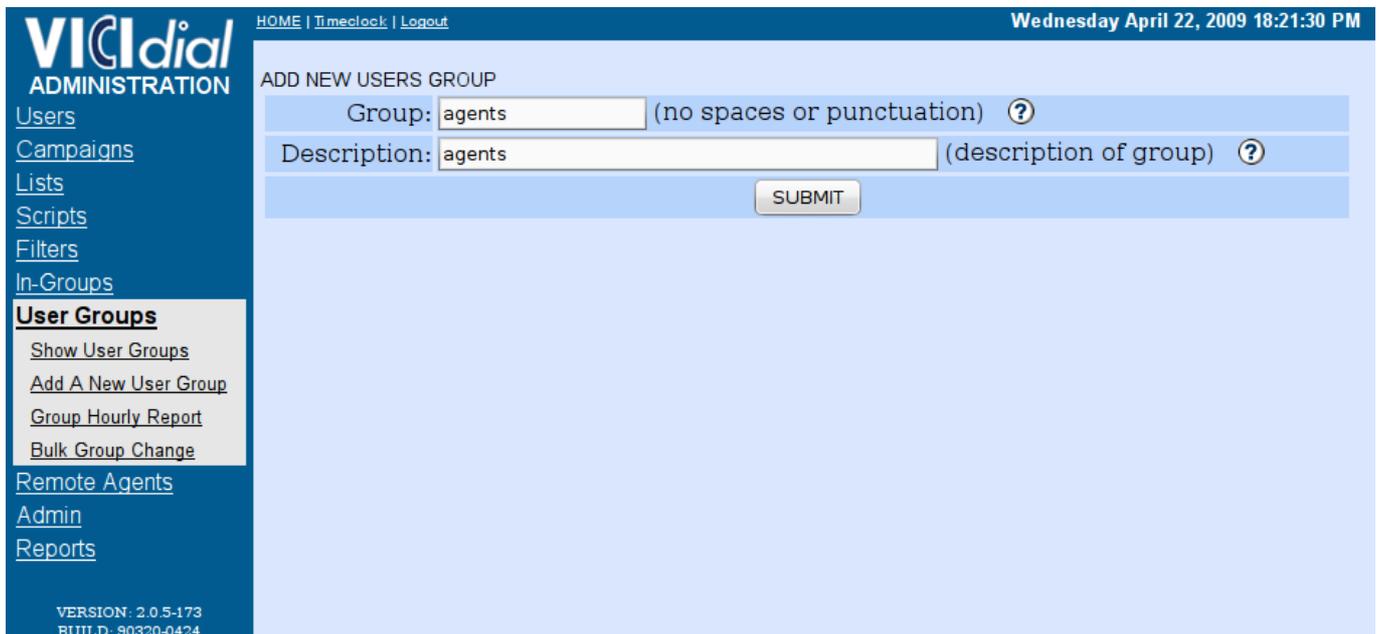
Click on the Manager's Login for the Manager Interface or directly go to <http://192.168.1.2/vicidial/admin.php>



The screenshot shows the 'User Listings' page in the Vicidial Administration interface. The top navigation bar includes 'HOME | Timeclock | Logout' and the date 'Wednesday April 22, 2009 17:01:58 PM'. The left sidebar contains a menu with 'Users' selected, listing options like 'Show Users', 'Add A New User', 'Copy User', 'Search For A User', 'User Stats', 'User Status', and 'Time Sheet'. Below this are other menu items: 'Campaigns', 'Lists', 'Scripts', 'Filters', 'In-Groups', 'User Groups', 'Remote Agents', 'Admin', and 'Reports'. At the bottom of the sidebar, it says 'VERSION: 2.0.5-173 BUILD: 90320-0424'. The main content area shows a table with the following data:

USER ID	FULL NAME	LEVEL	GROUP	ACTIVE	LINKS
admin	Admin	9	ADMIN	Y	<a href="#">MODIFY</a>   <a href="#">STATS</a>   <a href="#">STATUS</a>   <a href="#">TIME</a>

**Create a new group for the agents:**  
*User Groups > Add A New User Group > Submit*



The screenshot shows the 'Add New Users Group' form in the Vicidial Administration interface. The top navigation bar includes 'HOME | Timeclock | Logout' and the date 'Wednesday April 22, 2009 18:21:30 PM'. The left sidebar contains a menu with 'User Groups' selected, listing options like 'Show User Groups', 'Add A New User Group', 'Group Hourly Report', and 'Bulk Group Change'. Below this are other menu items: 'Remote Agents', 'Admin', and 'Reports'. At the bottom of the sidebar, it says 'VERSION: 2.0.5-173 BUILD: 90320-0424'. The main content area shows a form with the following fields:

ADD NEW USERS GROUP

Group:  (no spaces or punctuation) ?

Description:  (description of group) ?

**Create a new user:**

Users > Add a New User > Submit

HOME | Timeclock | Logout Wednesday April 22, 2009 18:21:47 PM

**Vicidial ADMINISTRATION**

**Users**

- Show Users
- Add A New User
- Copy User
- Search For A User
- User Stats
- User Status
- Time Sheet

Campaigns  
Lists  
Scripts  
Filters  
In-Groups  
User Groups  
Remote Agents  
Admin  
Reports

VERSION: 2.0.5-173  
BUILD: 90320-0424

**ADD A NEW USER**

User Number:   ?

Password:  ?

Full Name:  ?

User Level:  ?

User Group:

Phone Login:  ?

Phone Pass:  ?

**Create an outbound trunk:**

Admin > Carriers > Add A New Carrier > Fill in the account details from your VOIP provider > Submit

HOME | Timeclock | Logout Thursday April 23, 2009 6:05:08 AM

**Vicidial ADMINISTRATION**

**Admin**

- Call Times
- Shifts
- Phones
- Templates
- Carriers
- Servers
- Conferences
- System Settings
- System Statuses

Reports

**ADD NEW CARRIER**

Carrier ID:  ?

Carrier Name:  ?

Registration String:  ?

Template ID:  ?

Account Entry: 

```
[siptrunk]
type=friend
username=trunkuser
secret=trunkpass
host=sip.siptrunk.com
dtmfmode=rfc2833
context=inbound
canreinvite=no
disallow=all
allow=g729
insecure=port,invite
```

 ?

Protocol:  ?

Globals String:  ?

Dialplan Entry: 

```
exten => _91NXXNXXXXXX,1,AGI(agi://127.0.0.1:4577/call_log)
exten => _91NXXNXXXXXX,2,Dial(${TRUNK}/${EXTEN:1},,To)
exten => _91NXXNXXXXXX,3,Hangup
```

 ?

Server IP:  ?

# Activate New Trunk/Carrier:

Admin > Carriers > SIPTRUNK > Activate = Y > Submit

HOME | [Timeclock](#) | [Logout](#) Thursday April 23, 2009 6:06:24 AM

[Show Carriers](#) | [Add A New Carrier](#)

CARRIER ADDED

MODIFY A CARRIER RECORD: SIPTRUNK

Carrier ID: **SIPTRUNK**

Carrier Name:  ?

Registration String:  ?

Template ID:  ?

Account Entry: 

```
[siptrunk]
type=friend
username=trunkuser
secret=trunkpass
host=sip.siptrunk.com
dtmfmode=rfc2833
context=inbound
canreinvite=no
disallow=all
allow=g729
insecure=port,invite
```

 ?

Protocol:  ?

Globals String:  ?

Dialplan Entry: 

```
exten => _91NXXNXXXXXX,1,AGI(agi://127.0.0.1:4577/call_log)
exten => _91NXXNXXXXXX,2,Dial(${TRUNK}/${EXTEN:1},,To)
exten => _91NXXNXXXXXX,3,Hangup
```

 ?

Server IP:  ?

Active:  ?

**Load Leads for List ID 101:**

Create a csv/text file file with the following contents, replace 8662434357 with your own number for test calls:

```
"PHONE CODE","PHONE NUMBER","FIRST NAME","LAST NAME ","ADDRESS1","CITY","STATE","POSTAL CODE","COUNTRY CODE"  
1,8662434357,"test1","test1","Test address 1","Test City 1","CA",12345,1  
1,8662434357,"test2","test2","Test address 2","Test City 2","CA",12345,1  
1,8662434357,"test3","test3","Test address 3","Test City 3","CA",12345,1  
1,8662434357,"test4","test4","Test address 4","Test City 4","CA",12345,1  
1,8662434357,"test5","test5","Test address 5","Test City 5","CA",12345,1
```

save the file as testlead.csv then go to:

*Lists > Load New Leads > Browse the testlead.csv file > type 101 in the List ID > Select Custom Layout > Submit*

**Load leads from this file:** /home/caloy/PROJECTS/MNO  

List ID Override:  (numbers only or leave blank for values in the file)

Phone Code Override:  (numbers only or leave blank for values in the file)

**File layout to use:**  Standard VICIDIAL  Custom layout

Lead Duplicate Check:  ▼

Lead Time Zone Lookup:  ▼

[BACK TO ADMIN](#) LIST LOADER- VERSION: 2.0.5-29 BUILD: 90310-2128

Select the appropriate fields via the drop down menu then click **OK TO PROCESS**

Processing CSV file...

LIST ID OVERRIDE FOR THIS FILE: 101

VICIDIAL Column	File data
VENDOR LEAD CODE:	(none)
SOURCE ID:	(none)
PHONE CODE:	"PHONE CODE"
PHONE NUMBER:	"PHONE NUMBER"
TITLE:	(none)
FIRST NAME:	"FIRST NAME"
MIDDLE INITIAL:	(none)
LAST NAME:	"LAST NAME "
ADDRESS1:	"ADDRESS1"
ADDRESS2:	(none)
ADDRESS3:	(none)
CITY:	"CITY"
STATE:	"STATE"
PROVINCE:	(none)
POSTAL CODE:	"POSTAL CODE"
COUNTRY CODE:	"COUNTRY CODE"
GENDER:	(none)
DATE OF BIRTH:	(none)
ALT PHONE:	(none)
EMAIL:	(none)
SECURITY PHRASE:	(none)
COMMENTS:	(none)

If the loading of leads is successful you can see the following window:

**VICIdial** [Users](#) [Campaigns](#) [Lists](#) [Scripts](#) [Filters](#) [In-Groups](#) [User Groups](#) [Remote Agents](#) [Admin](#) [Reports](#)

Load leads from this file:   

List ID Override:  (numbers only or leave blank for values in the file)

Phone Code Override:  (numbers only or leave blank for values in the file)

File layout to use:  Standard VICIDIAL  Custom layout

Lead Duplicate Check:

Lead Time Zone Lookup:

[BACK TO ADMIN](#) LIST LOADER- VERSION: 2.0.5-29 BUILD: 90310-2128

Processing CSV file...

LIST ID OVERRIDE FOR THIS FILE: 101

record 0 BAD- PHONE: ROW: [PHONE CODE] DUP:

Done GOOD: 5 BAD: 1 TOTAL: 6

Go to **Campaigns > TESTCAMP**

You can see that the leads are successfully loaded and there are currently 5 leads in the dial hopper.

HOME | Timeclock | Logout
Wednesday April 22, 2009 18:33:07 PM

Show Campaigns | 
 Add A New Campaign | 
 Copy Campaign | 
 Real-Time Campaigns Summary

**VIC**dial  
ADMINISTRATION

Users

**Campaigns**

[Campaigns Main](#)

[Statuses](#)

[HotKeys](#)

[Lead Recycle](#)

[Auto-Alt Dial](#)

[List Mix](#)

[Pause Codes](#)

[Lists](#)

[Scripts](#)

[Filters](#)

[In-Groups](#)

[User Groups](#)

[Remote Agents](#)

[Admin](#)

[Reports](#)

**TESTCAMP:** [Basic View](#) | [Detail View](#) | [List Mix](#) | [Real-Time Screen](#)

Campaign ID: **TESTCAMP** ?

Campaign Name:  ?

Campaign Description: test campaign for vicidial ?

Campaign Change Date: 2009-04-19 22:52:27 ?

Campaign Login Date: ?

Active:  ?

Park Extension: - ?

Web Form: ?

Allow Closers: Y ?

Default Transfer Group: ---NONE--- ?

Allow Inbound and Blended: N ?

Dial Status 1: **NEW - New Lead** [REMOVE](#)

Add A Dial Status:   ?

List Order:  ?

[List Mix](#):  ?

[Lead Filter](#):  ?

Hopper Level:  ?

Force Reset of Hopper:  ?

Dial Method:  ?

Auto Dial Level:  (0 = off) ?

Adapt Intensity Modifier:  ?

[Script](#):

Get Call Launch: NONE

**LISTS WITHIN THIS CAMPAIGN:** ?

LIST ID	LIST NAME	DESCRIPTION	LEADS COUNT	ACTIVE	LAST CALL DATE	MODIFY
<a href="#">101</a>	load me some leads	please load me some leads	5	Y <input type="button" value="X"/>		<a href="#">MODIFY</a>

**This campaign has 1 active lists and 0 inactive lists**

|| **This campaign has 5 leads to be dialed in those lists - [HIDE](#)**

**This campaign has 5 leads in the dial hopper**

[Click here to see what leads are in the hopper right now](#)

[Click here to see a VDAD report for this campaign](#)

[Click here to see all Callback Holds in this campaign](#)

[Click here to see Admin chages to this campaign](#)

**[AGENT RANKS FOR THIS CAMPAIGN:](#)**

USER	RANK	CALLS TODAY
<a href="#">LOG ALL AGENTS OUT OF THIS CAMPAIGN</a>		
<a href="#">DELETE THIS CAMPAIGN</a>		

If the dial hopper is not being populated with leads make sure to set the Local Call Time to 24hours:  
**Campaigns > TESTCAMP > Detail view> Set the Local Call Time to 24 Hours > Submit**

Auto Alt-Number Dialing:	NONE	?
Next Agent Call:	oldest_call_finish	?
Local Call Time:	24hours - default 24 hours calling	?
Dial Timeout:	60 in seconds	?
Dial Prefix:	9	for 91NXXNXXXXXX value would be 9, for no dial prefix use X ?

Configure your favorite Softphone, for this document I used Twinkle with the following credentials:

Username:cc100

Password: test

Realm/Domain: 192.168.1.2

The screenshot shows a dialog box titled "Twinkle - User profile: test". On the left is a sidebar with icons for various settings: User, SIP server, Voice mail, Instant message, Presence, RTP audio, SIP protocol, Transport/NAT, Address format, Timers, Ring tones, Scripts, and Security. The main area is titled "User" and contains two sections: "SIP account" and "SIP authentication".

**SIP account**

- Your name: cc100
- User name\*: cc100
- Domain\*: 192.168.1.2
- Organization: (empty)

**SIP authentication**

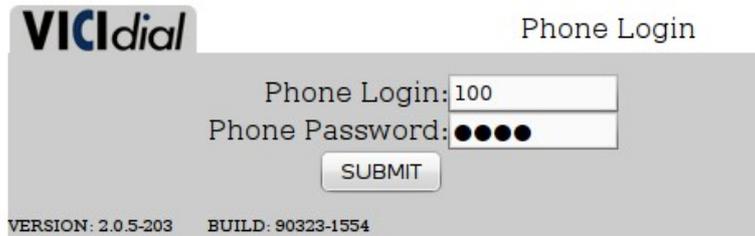
- Realm: 192.168.1.2
- Authentication name: cc100
- Password: (masked with dots)

Buttons for "OK" and "Cancel" are at the bottom right.

Open the Agent Interface - <http://192.168.1.2/agc/vicidial.php>  
and login using the following credentials:

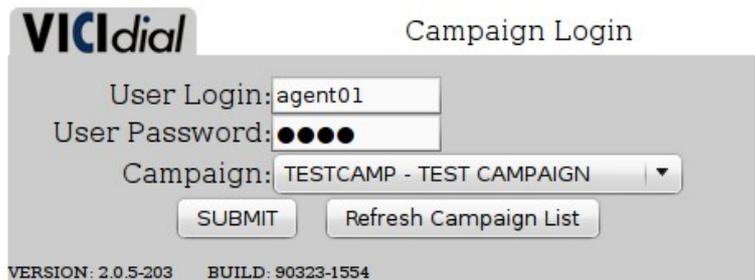
Phone Login: 100  
Phone Password: test  
User Login: agent01  
User Password: test  
Campaign: TESTCAMP

[Timeclock](#)



The screenshot shows the 'VICIdial' logo on the left and 'Phone Login' on the right. The form contains two input fields: 'Phone Login:' with the value '100' and 'Phone Password:' with four black dots. Below these is a 'SUBMIT' button. At the bottom left, it displays 'VERSION: 2.0.5-203' and 'BUILD: 90323-1554'.

[Timeclock](#)



The screenshot shows the 'VICIdial' logo on the left and 'Campaign Login' on the right. The form contains three input fields: 'User Login:' with the value 'agent01', 'User Password:' with four black dots, and 'Campaign:' with a dropdown menu showing 'TESTCAMP - TEST CAMPAIGN'. Below these are two buttons: 'SUBMIT' and 'Refresh Campaign List'. At the bottom left, it displays 'VERSION: 2.0.5-203' and 'BUILD: 90323-1554'.

When you login, your phone (extension 100) will ring, answer it and you will hear something like "You are currently the only person in this conference" don't hang up until you logout form the Agent Interface.

Click LEAD PREVIEW > DIAL NEXT NUMBER > DIAL LEAD

Logged in as User: agent01 on Phone: SIP/cc100 to campaign: TESTCAMP

[LOGOUT](#)

**VICdial** SCRIPT 2009-04-23 06:33:53 session ID: 8600051 NO LIVE CALL

STATUS: Calling: (866)243-4357 UID: Preview the Lead then [DIAL LEAD](#) or [SKIP LEAD](#) seconds:

**DIAL NEXT NUMBER** Customer Time:  Channel:

LEAD PREVIEW  
RECORDING FILE:

RECORD ID: **START RECORDING**

**WEB FORM**

**PARK CALL**

**TRANSFER - CONF**

**HANGUP CUSTOMER**

**SEND DTMF**

Customer Information:

Title:  First:  MI:  Last:

Address1:

Address2:  Address3:

City:  State:  PostCode:

Province:  Vendor ID:  Gender:

Phone: 8662434357 DialCode:  Alt. Phone:

Show:  Email:

Comments:

VICIDIAL web-client version: 2.0.5-203 BUILD: 90323-1554 Server: 192.168.1.2  
[Show conference call channel information](#)

**MUTE**

[Alert is OFF](#)

If the call is successful you should see the below screen with LIVE CALL.

Logged in as User: agent01 on Phone: SIP/cc100 to campaign: TESTCAMP

[LOGOUT](#)

**VICdial** SCRIPT 2009-04-23 06:36:06 session ID: 8600051 **LIVE CALL**

STATUS: Called: (866)243-4357 UID: M042218355400000001 seconds: 8

**DIAL NEXT NUMBER** Customer Time:  Channel:

LEAD PREVIEW  
RECORDING FILE:

RECORD ID: **START RECORDING**

**WEB FORM**

**PARK CALL**

**TRANSFER - CONF**

**HANGUP CUSTOMER**

**SEND DTMF**

Customer Information:

Title:  First:  MI:  Last:

Address1:

Address2:  Address3:

City:  State:  PostCode:

Province:  Vendor ID:  Gender:

Phone: 8662434357 DialCode:  Alt. Phone:

Show:  Email:

Comments:

VICIDIAL web-client version: 2.0.5-203 BUILD: 90323-1554 Server: 192.168.1.2  
[Show conference call channel information](#)

**MUTE**

[Alert is OFF](#)

After the Call click HANGUP CUSTOMER and select a CALL DISPOSITION.

DISPOSITION CALL :8662434357    [Hangup Again](#)    [minimize](#)

**CALL DISPOSITION**

<a href="#">A - Answering Machine</a>	<a href="#">N - No Answer</a>
<a href="#">B - Busy</a>	<a href="#">NI - Not Interested</a>
<a href="#">CALLBK - Call Back</a>	<a href="#">NP - No Pitch No Price</a>
<a href="#">DC - Disconnected Number</a>	<a href="#">SALE - Sale Made</a>
<a href="#">DEC - Declined Sale</a>	<a href="#">XFER - Call Transferred</a>
<a href="#">DNC - DO NOT CALL</a>	

PAUSE AGENT DIALING  
[CLEAR FORM](#) | [SUBMIT](#)

[WEB FORM SUBMIT](#)