VicidialNOW CE - Getting Started Guide – *Draft*

Date: 2009/04/23
Prepared By: Carlo Taguinod (carlo@taguinod.net)

Disclaimer:
The author of this document does not warrant or assume any legal liability or responsibility for the accuracy, completeness, or usefulness of any information, product, or process disclosed. Any consequences or results achieved directly or indirectly by this document or information are entirely your responsibility.

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

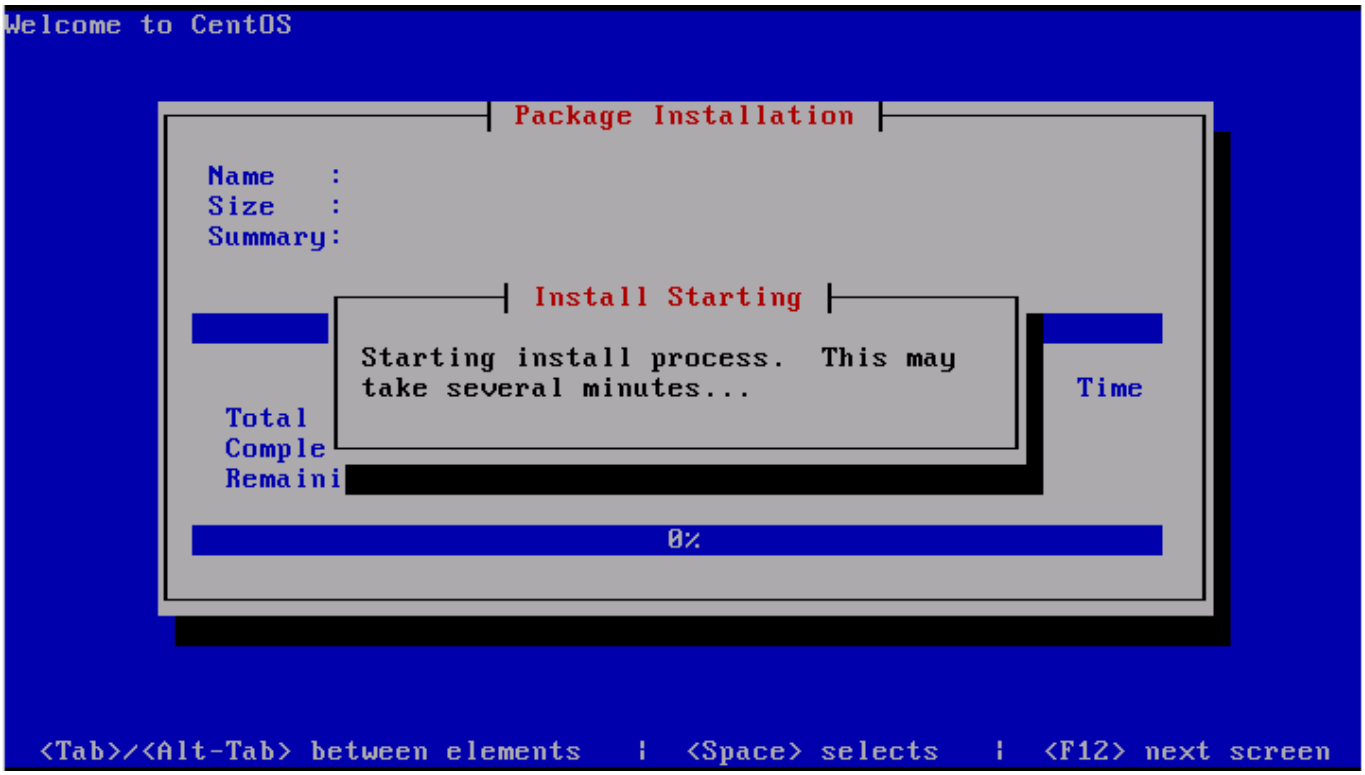
What are the default usernames and passwords ?

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

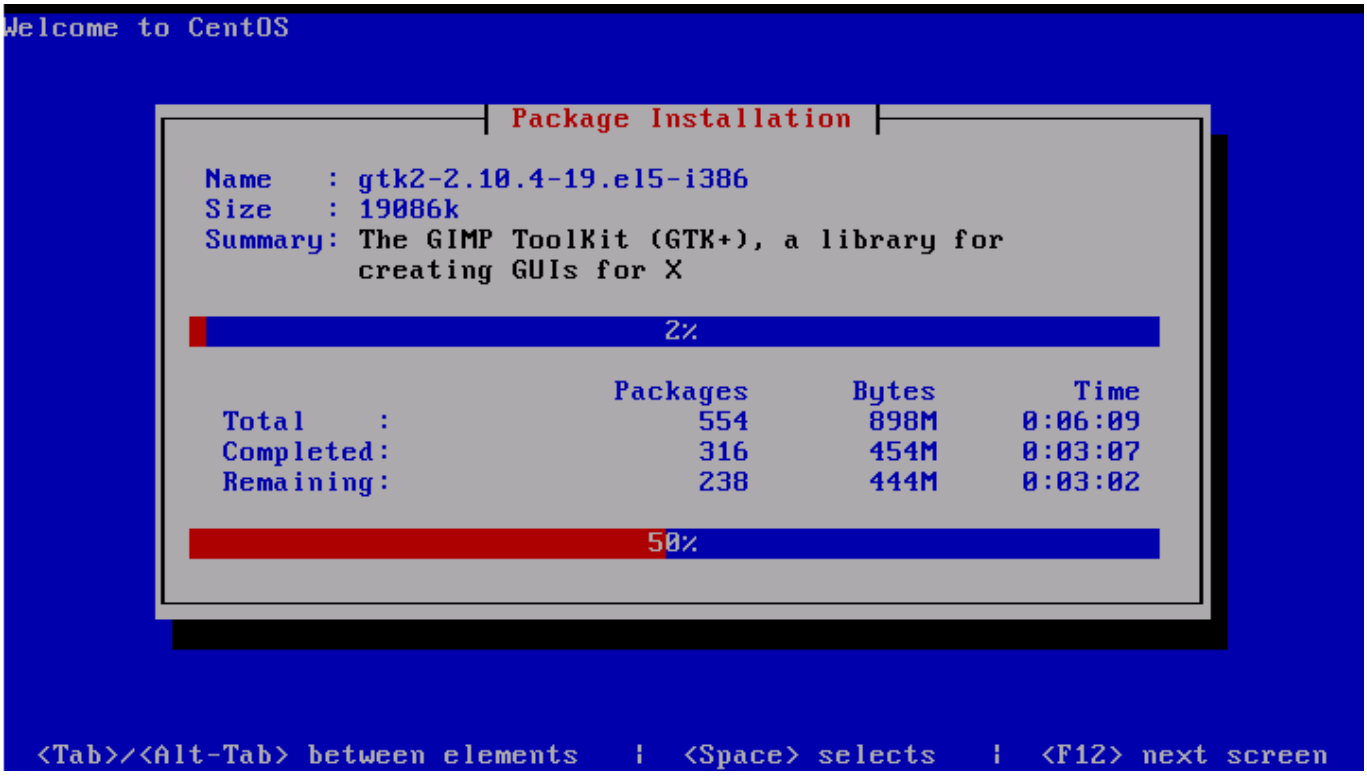
Requirements:
- Download the VicidialNow CE 1.2 final release from http://www.vicidialnow.org/
- Burn to CD using program like Nero on Windows or K3B on Linux and configure your server to boot from CD.

Install the Base System:
Boot from your VicidialNow CD. Press <*Enter*> at the boot promt:

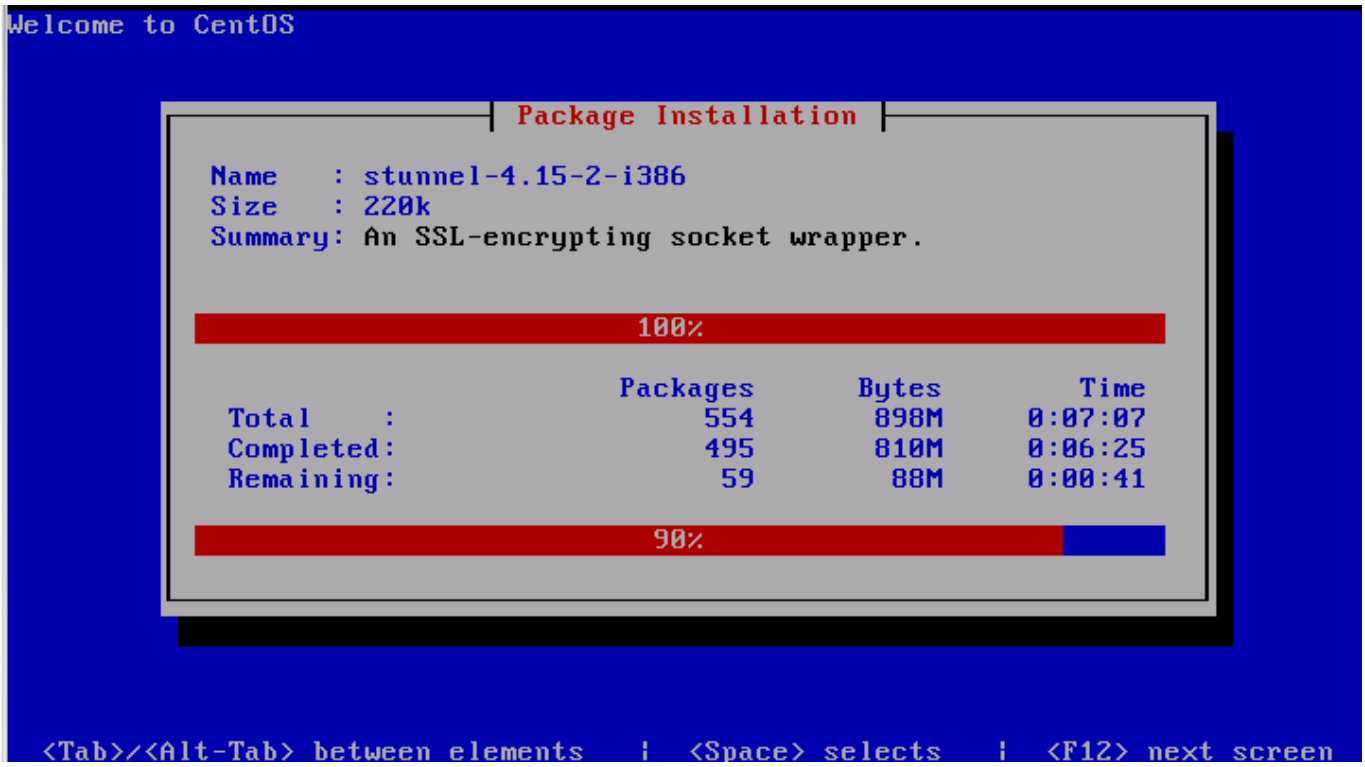
The automated installer takes care of everything so you just need to wait for around 15 minutes depending on your hardware for the whole installation process to finish.



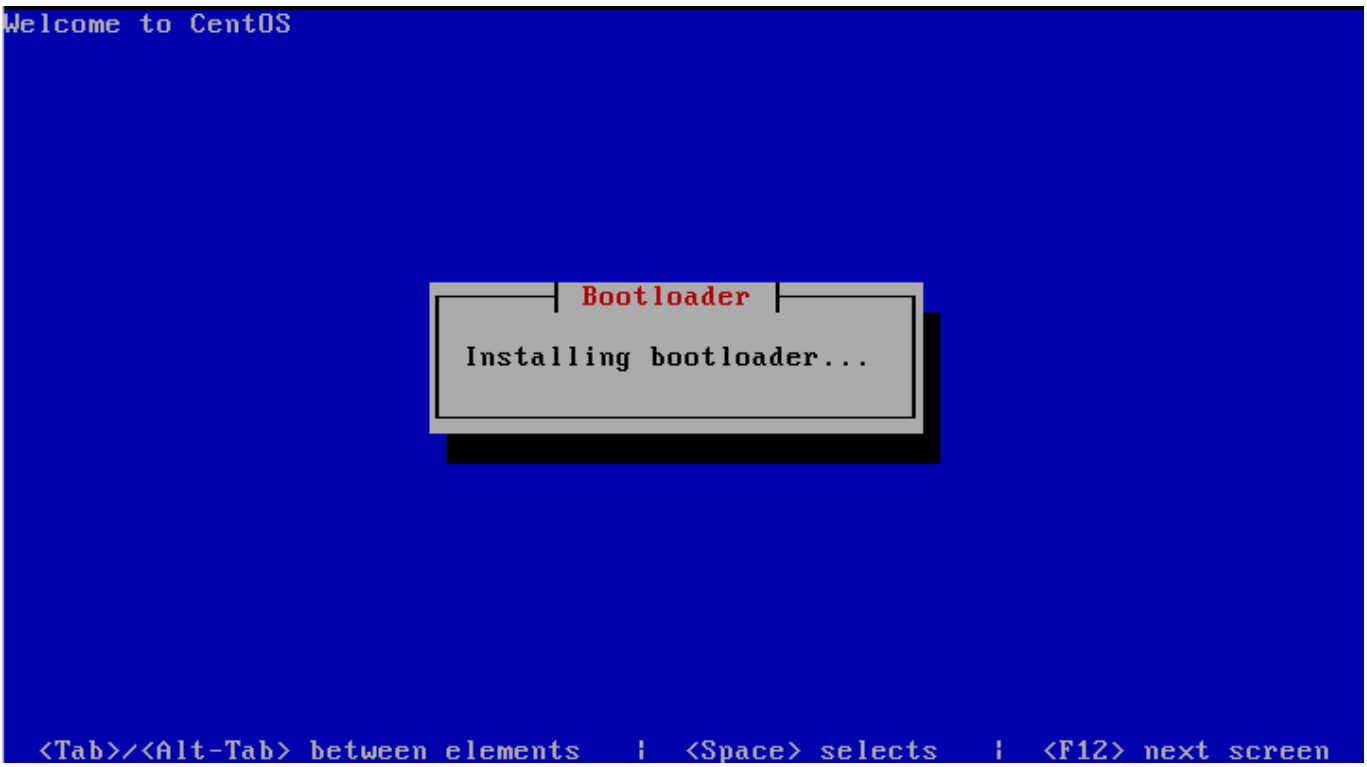
Halfway through the package installation:



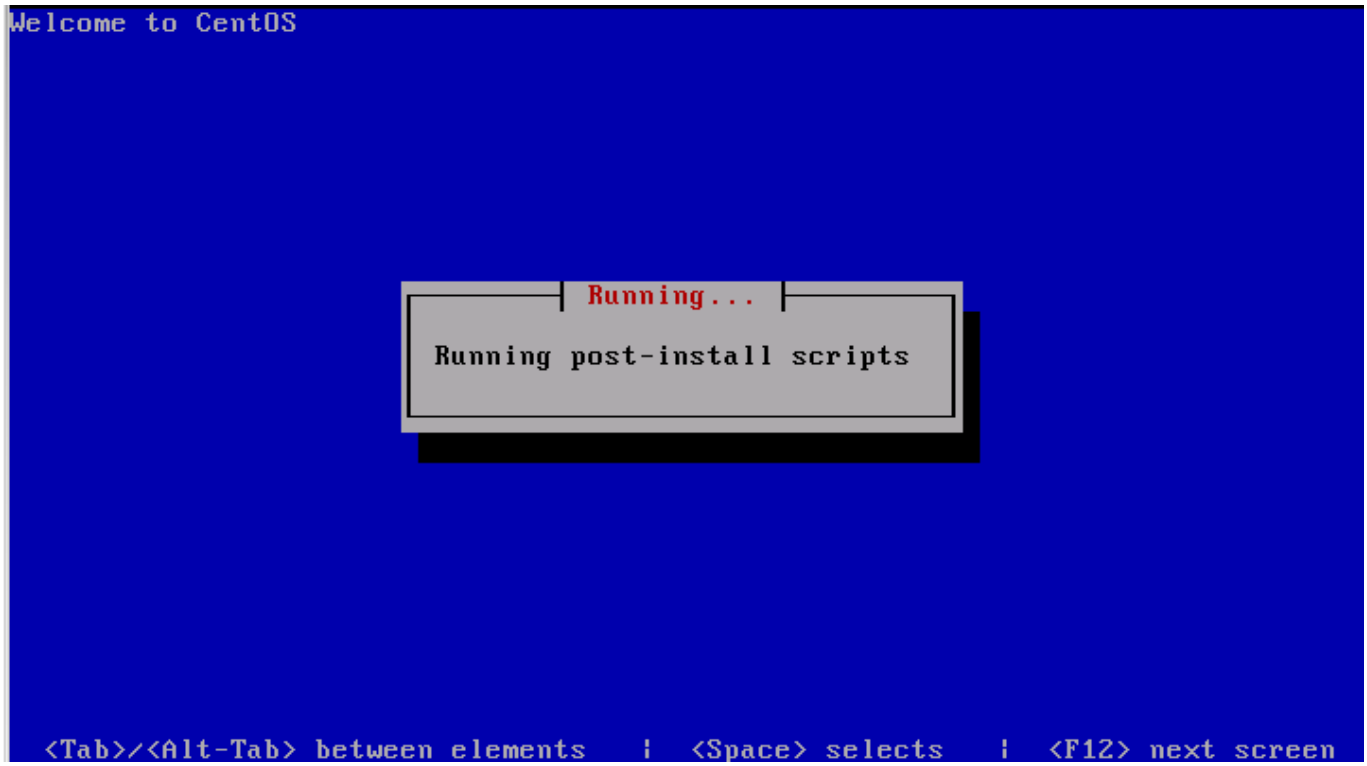
Package Installation almost finished:



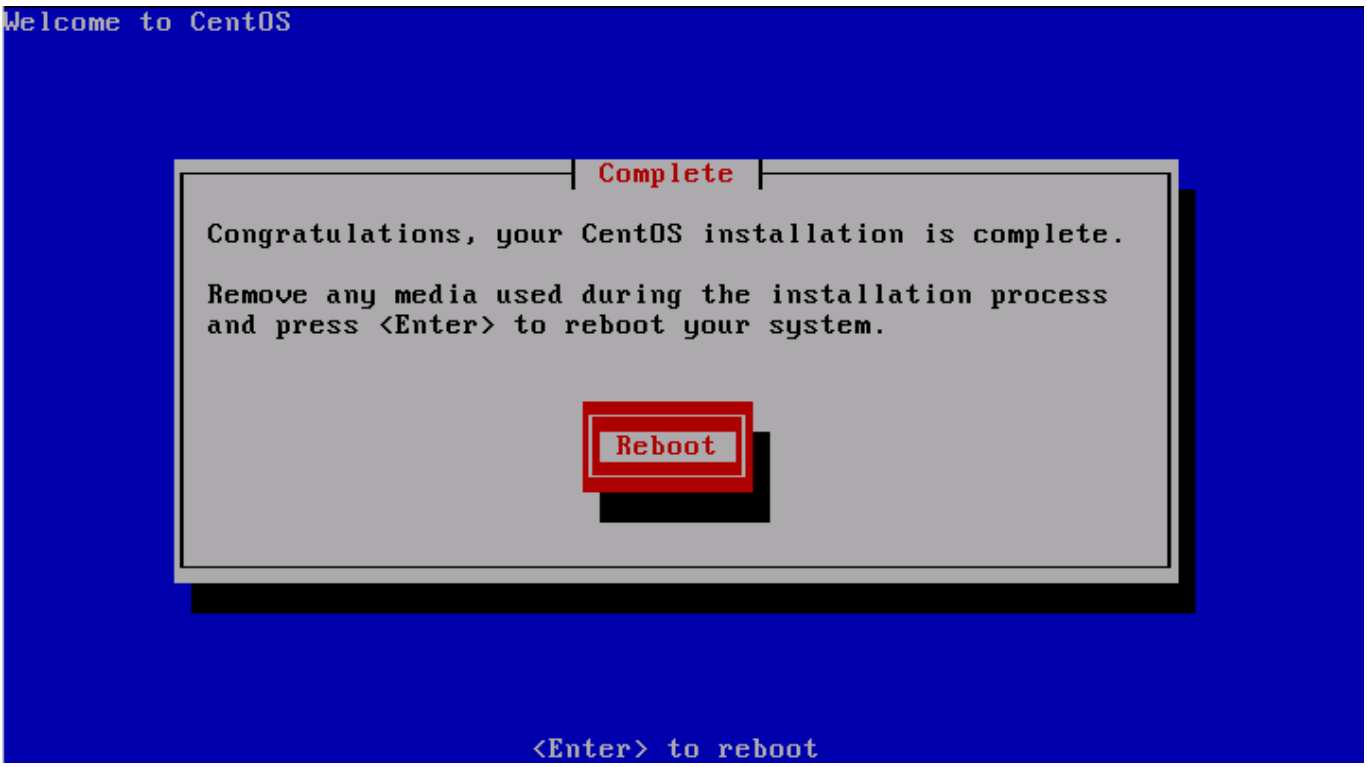
Bootloader Installation:



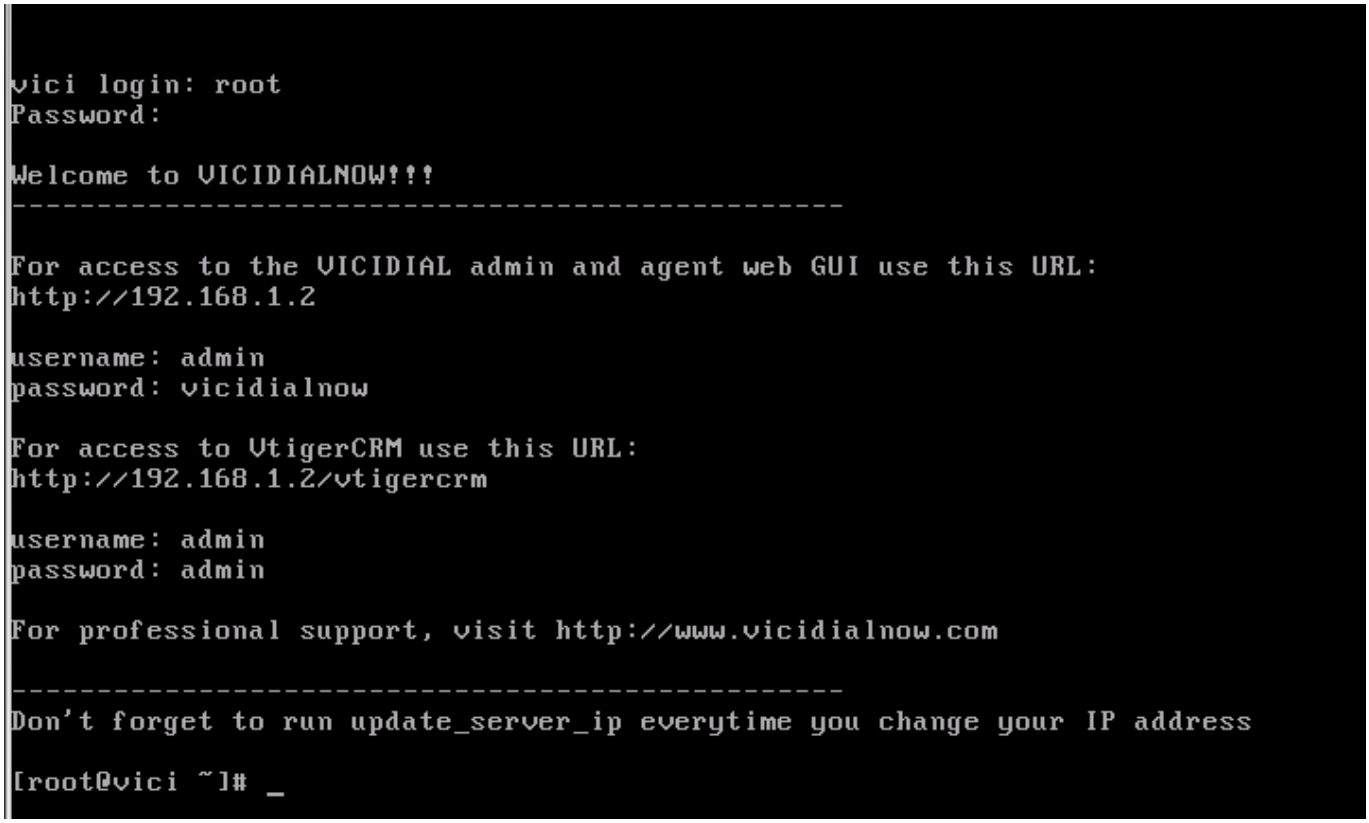
Running post-install scripts



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



Login using the following user account:
username: root
password: vicidialnow

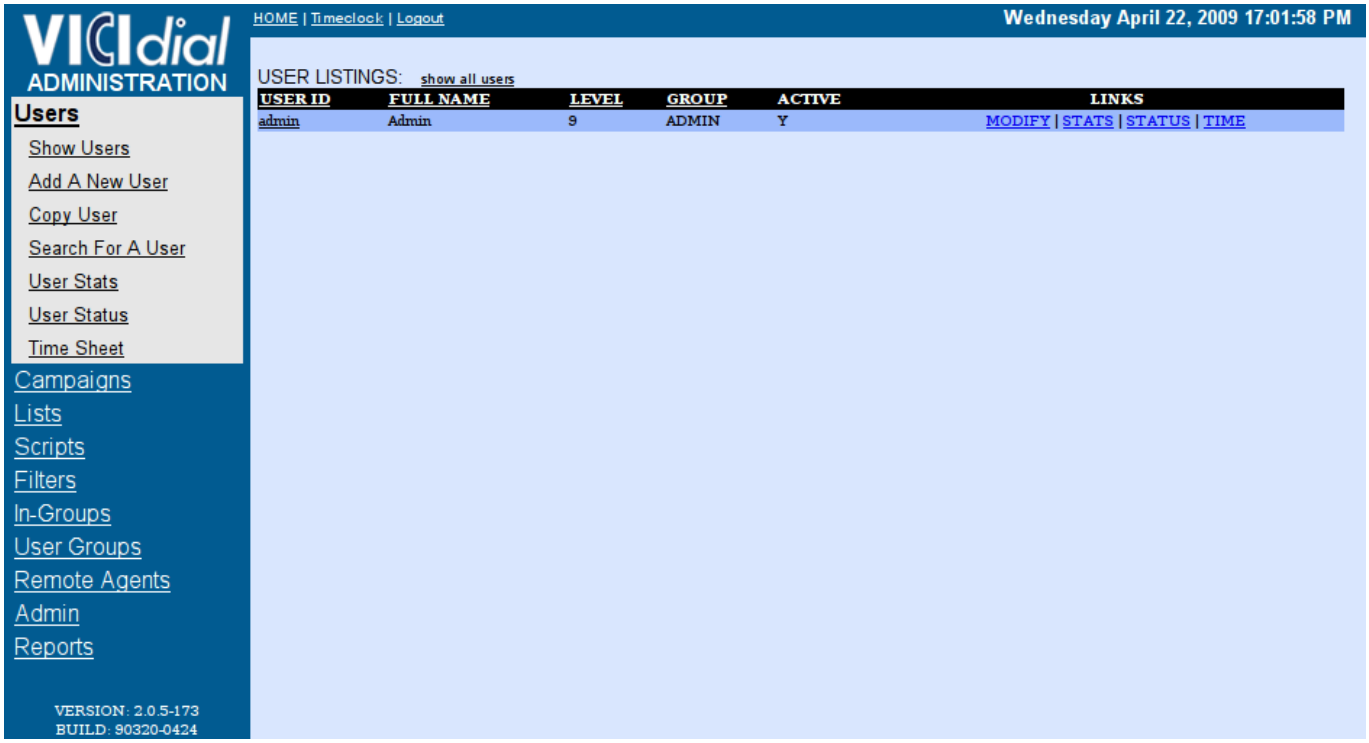


The default IP address of the VicidialNow CE 1.2 is 192.168.1.2 but there is no default gateway defined so you have to manually add the default gateway to have internet access, assuming the default gateway of your network is 192.168.1.1 you have to issue the following command: ***route add default gw 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

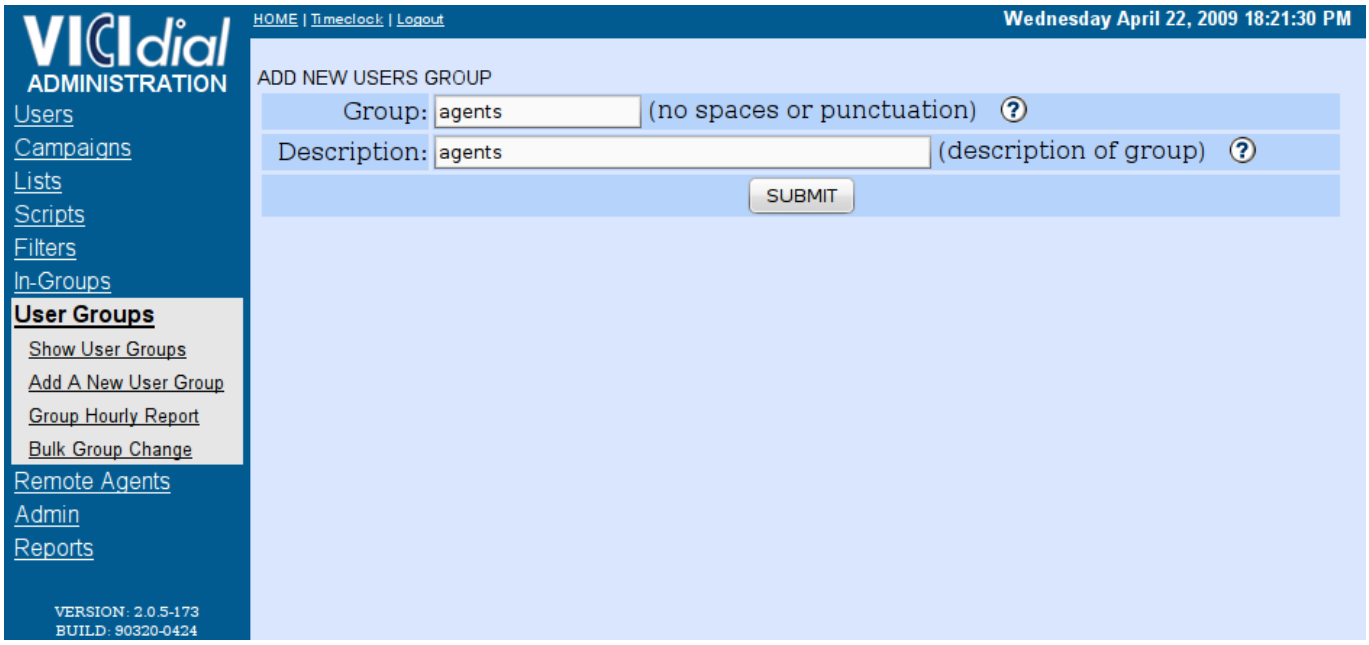
```
[root@vici ~]# netstat -rn
Kernel IP routing table
Destination     Gateway         Genmask         Flags   MSS Window  irtt Iface
192.168.1.0     0.0.0.0         255.255.255.0   U         0 0          0 eth0
169.254.0.0     0.0.0.0         255.255.0.0     U         0 0          0 eth0
[root@vici ~]# 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/

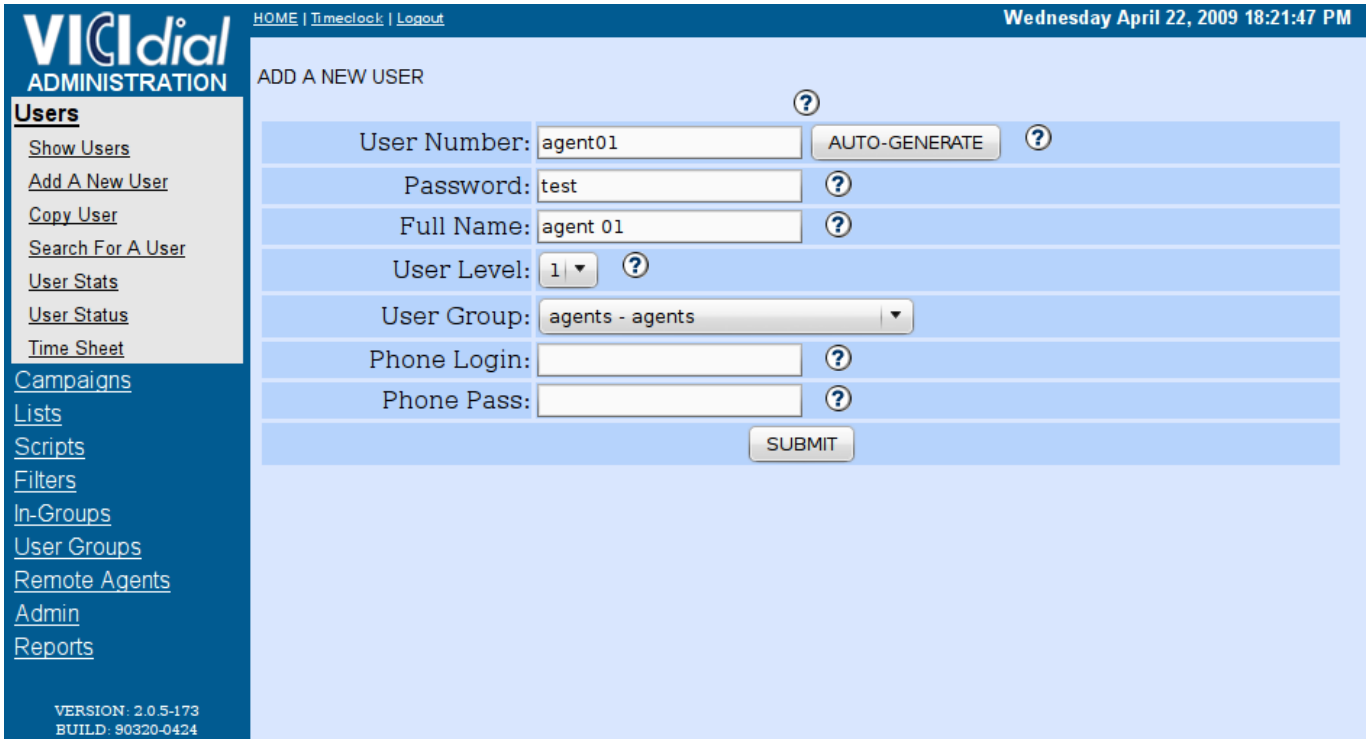
Click on the Manager's Login for the Manager Interface or directly go to
http://192.168.1.2/vicidial/admin.php



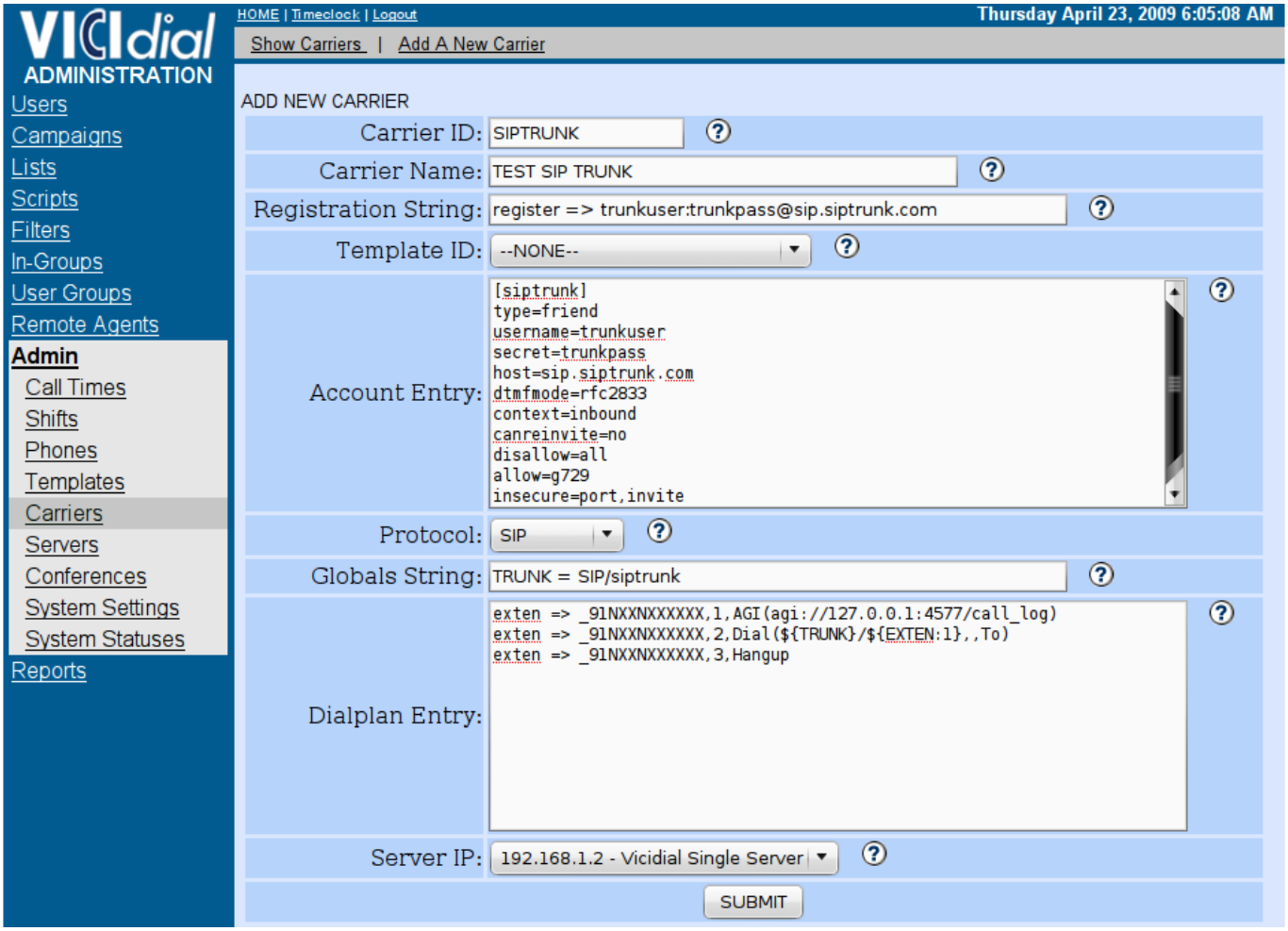
Create a new group for the agents:
User Groups > Add A New User Group > Submit



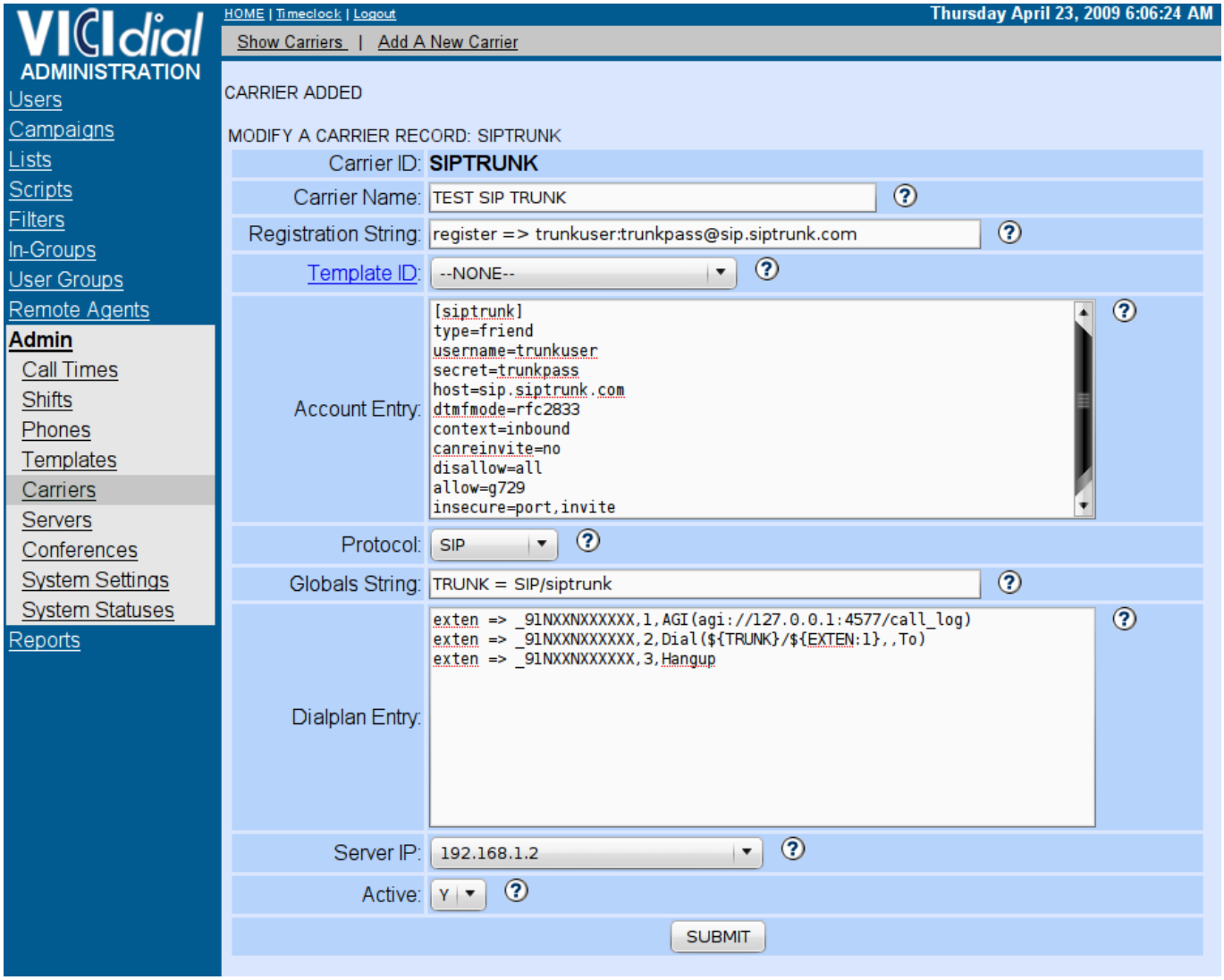
Create a new user:
Users > Add a New User > Submit



Create an outbound trunk:
Admin > Carriers > Add A New Carrier > Fill in the account details from your VOIP provider> Submit



Activate New Trunk/Carrier:
Admin > Carriers > SIPTRUNK > Activate = Y > Submit



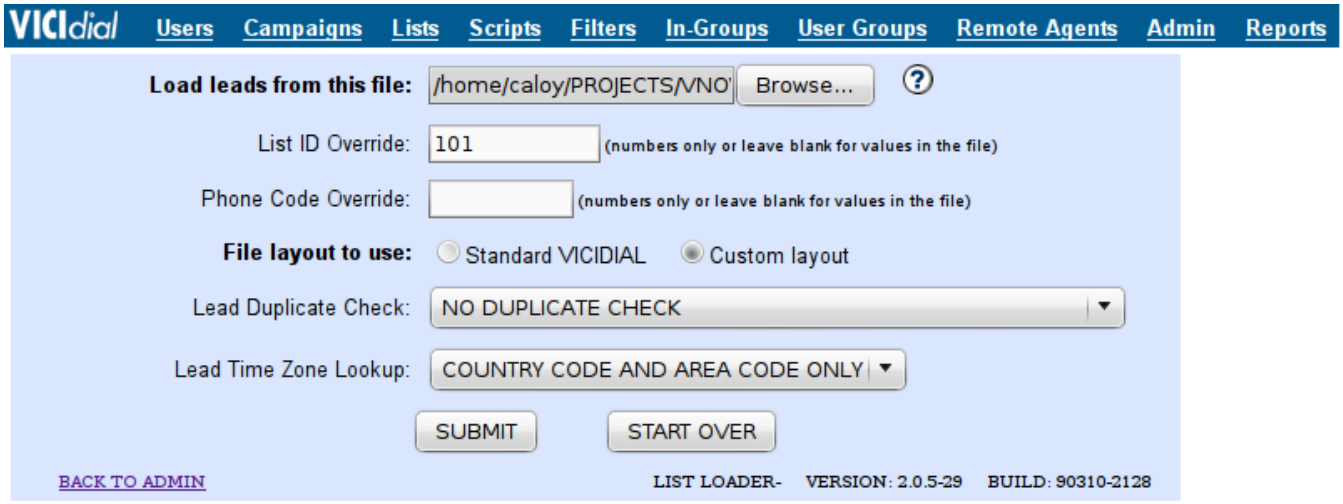
Load Leads for List ID 101:

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

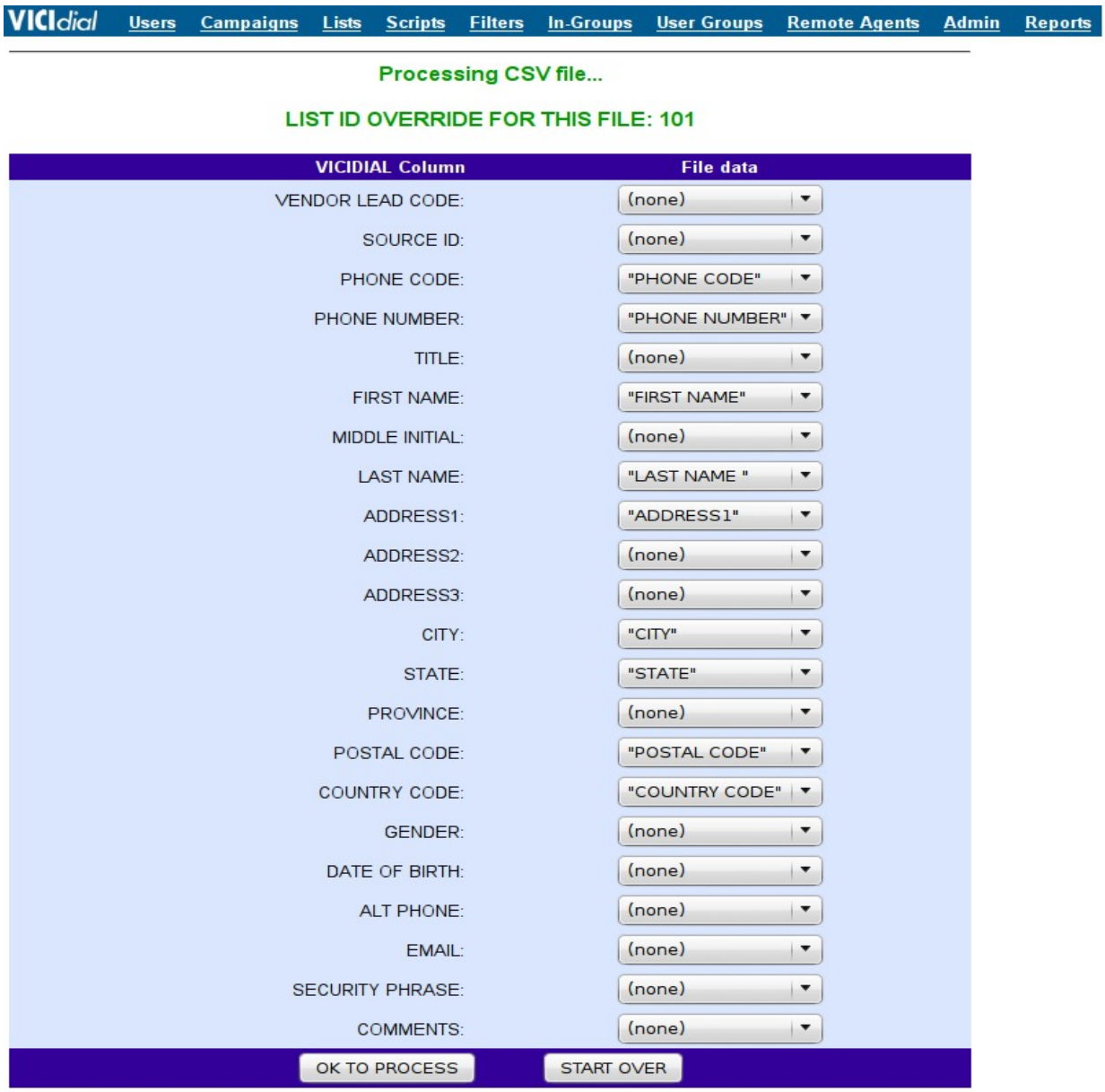
```
"PHONE CODE","PHONE NUMBER","FIRST NAME","LAST NAME ","ADDRESS1","CITY","STATE","POSTAL CODE","COUNTRY CODE"
1,8662434357,"test1","test1","Test address 1","Test City 1","CA",12345,1
1,8662434357,"test2","test2","Test address 2","Test City 2","CA",12345,1
1,8662434357,"test3","test3","Test address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

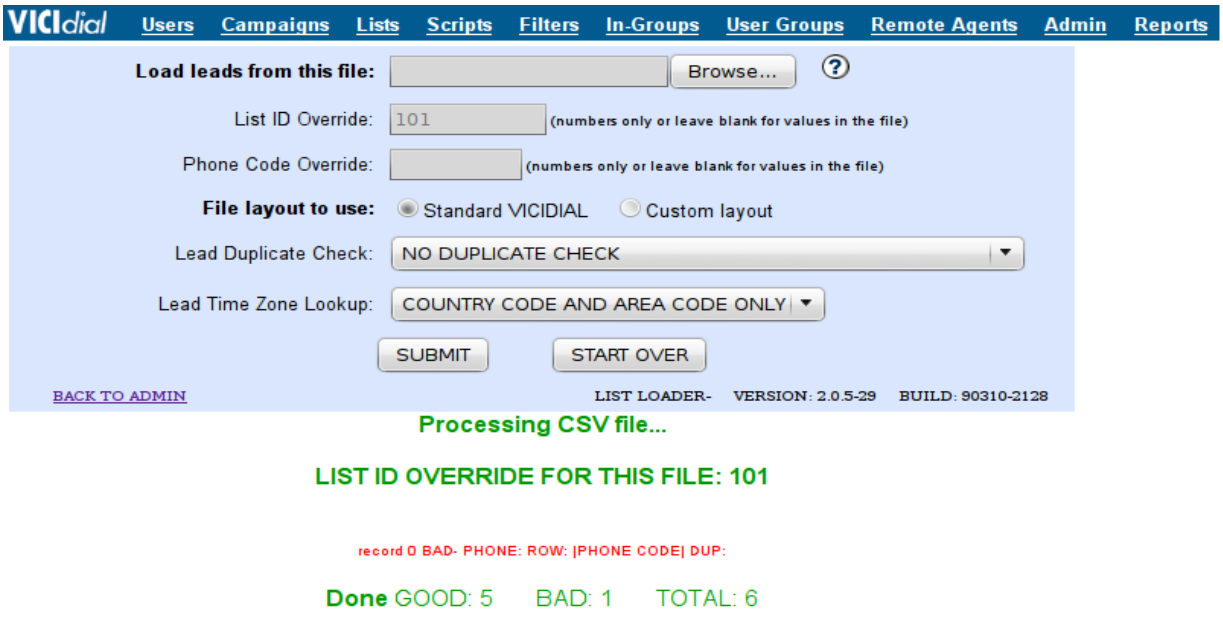
Lists > Load New Leads > Browse the testlead.csv file > type 101 in the List ID > Select Custom Layout > Submit



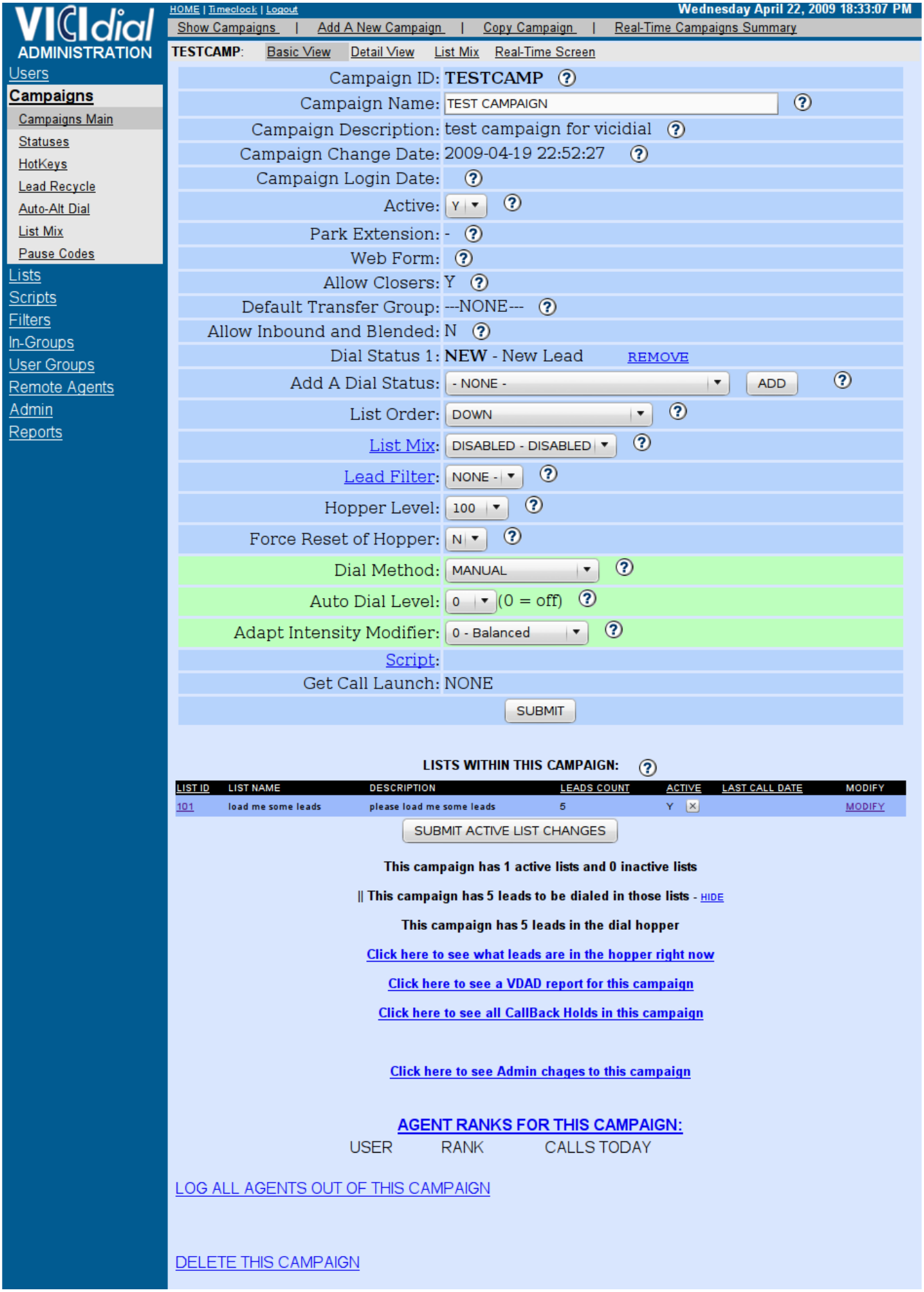
Select the appropriate fields via the drop down menu then click ***OK TO PROCESS***



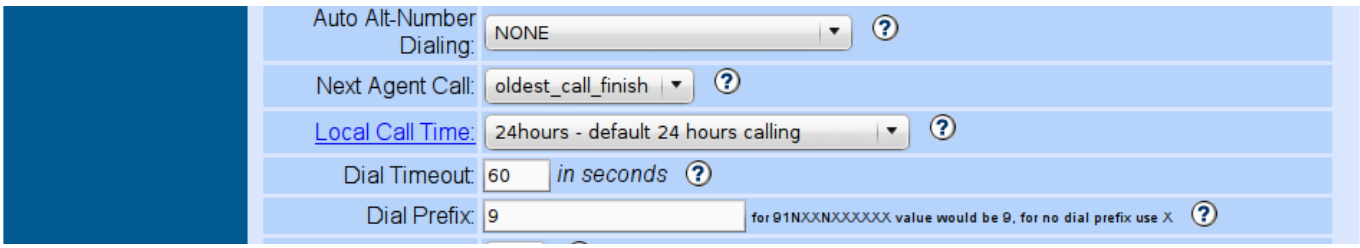
If the loading of leads is successful you can see the following window:



Go to ***Campaigns > TESTCAMP***
You can see that the leads are successfully loaded and there are currently 5 leads in the dial hopper.

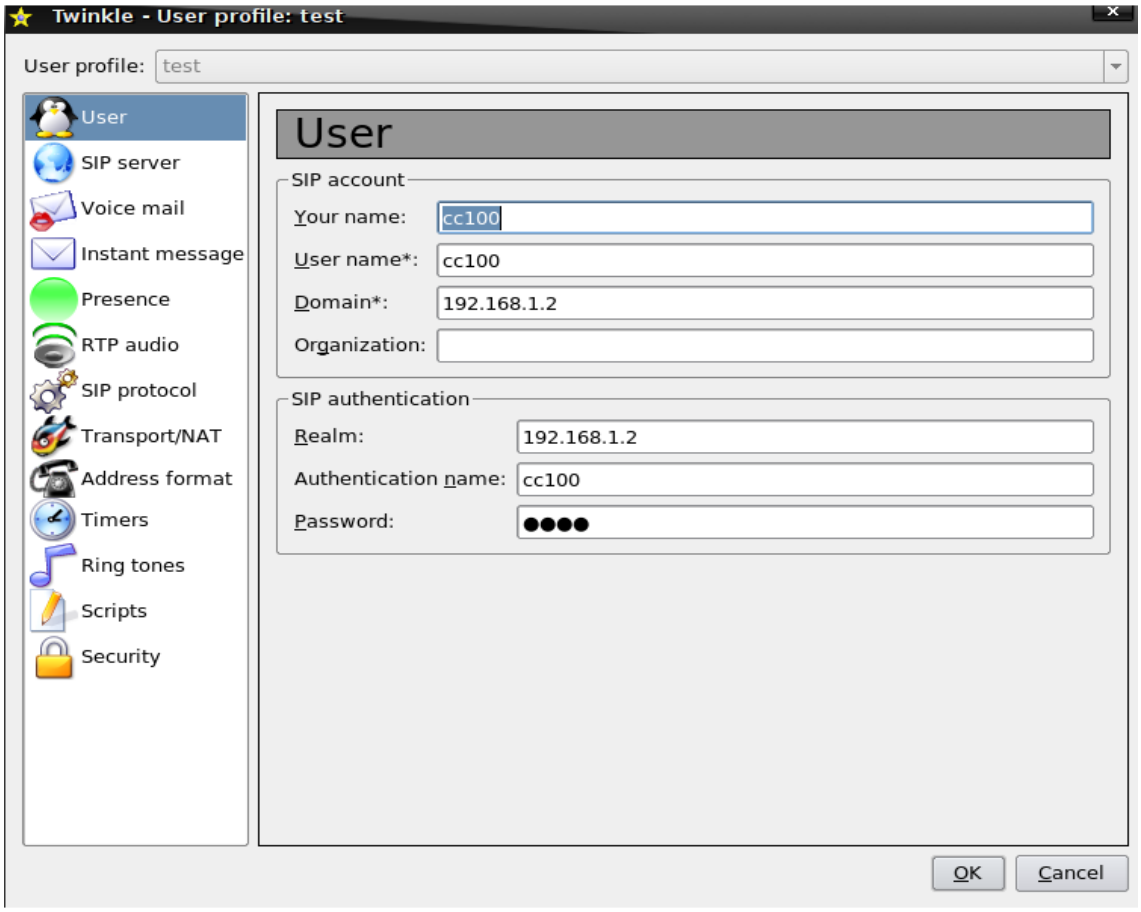


If the dial hopper is not being populated with leads make sure to set the Local Call Time to 24hours:
Campaigns > TESTCAMP > Detail view> Set the Local Call Time to 24 Hours > Submit



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

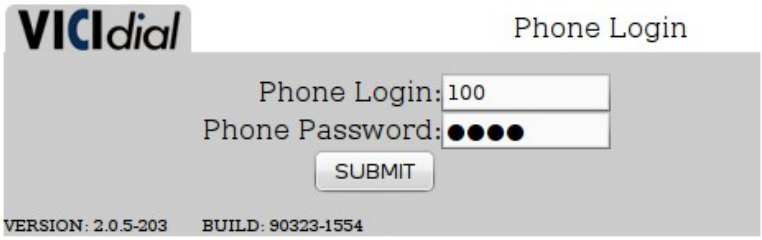
Username:cc100
Password: test
Realm/Domain: 192.168.1.2



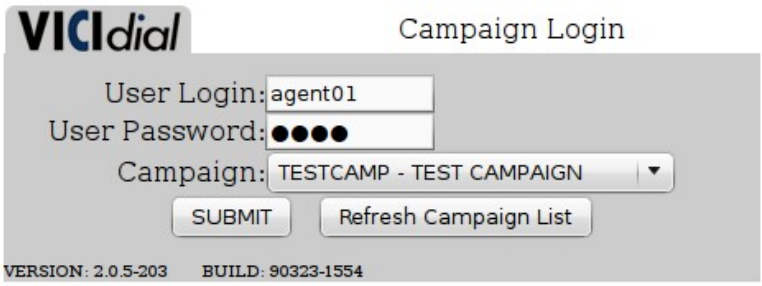
Open the Agent Interface - http://192.168.1.2/agc/vicidial.php
and login using the following credentials:

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

Timeclock

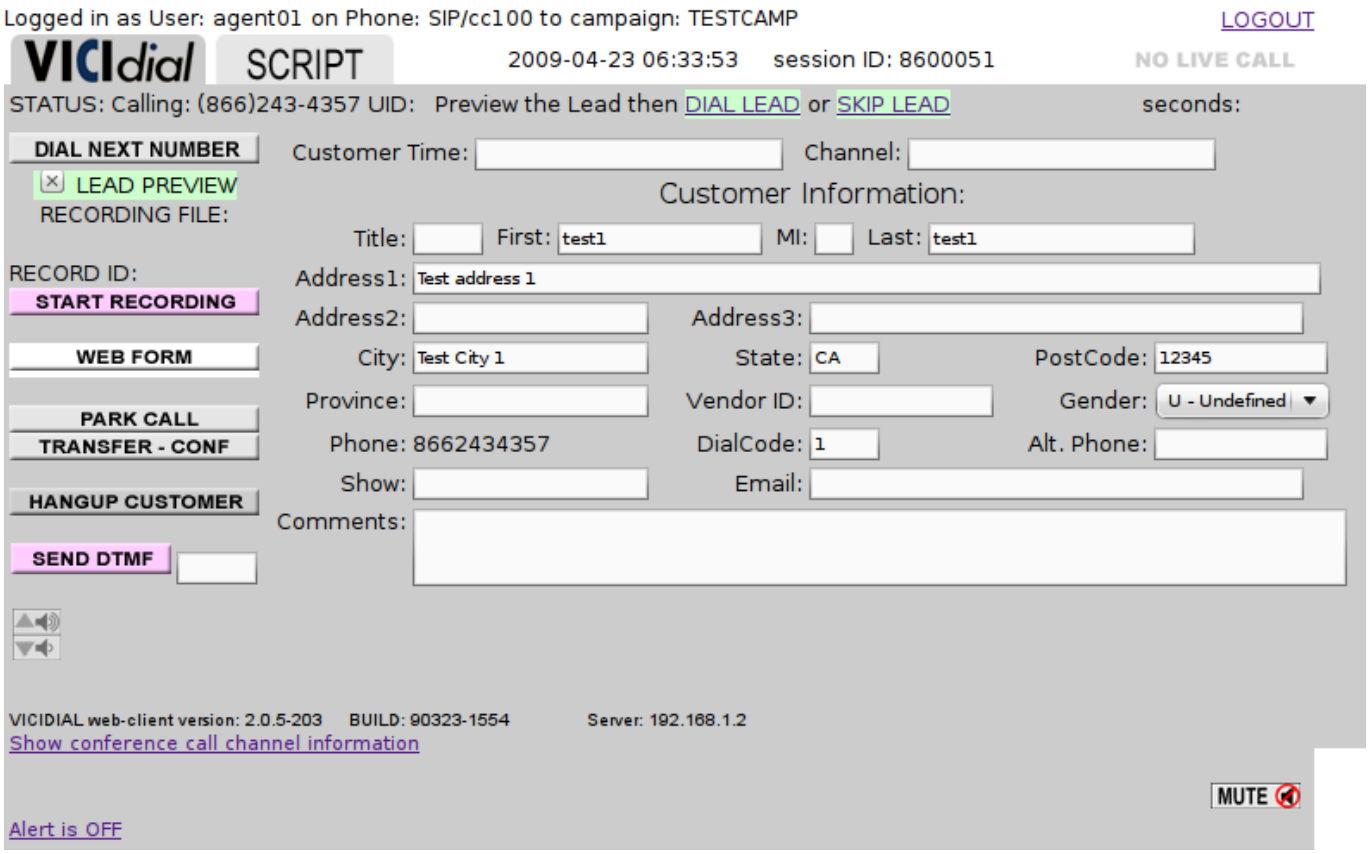


Timeclock

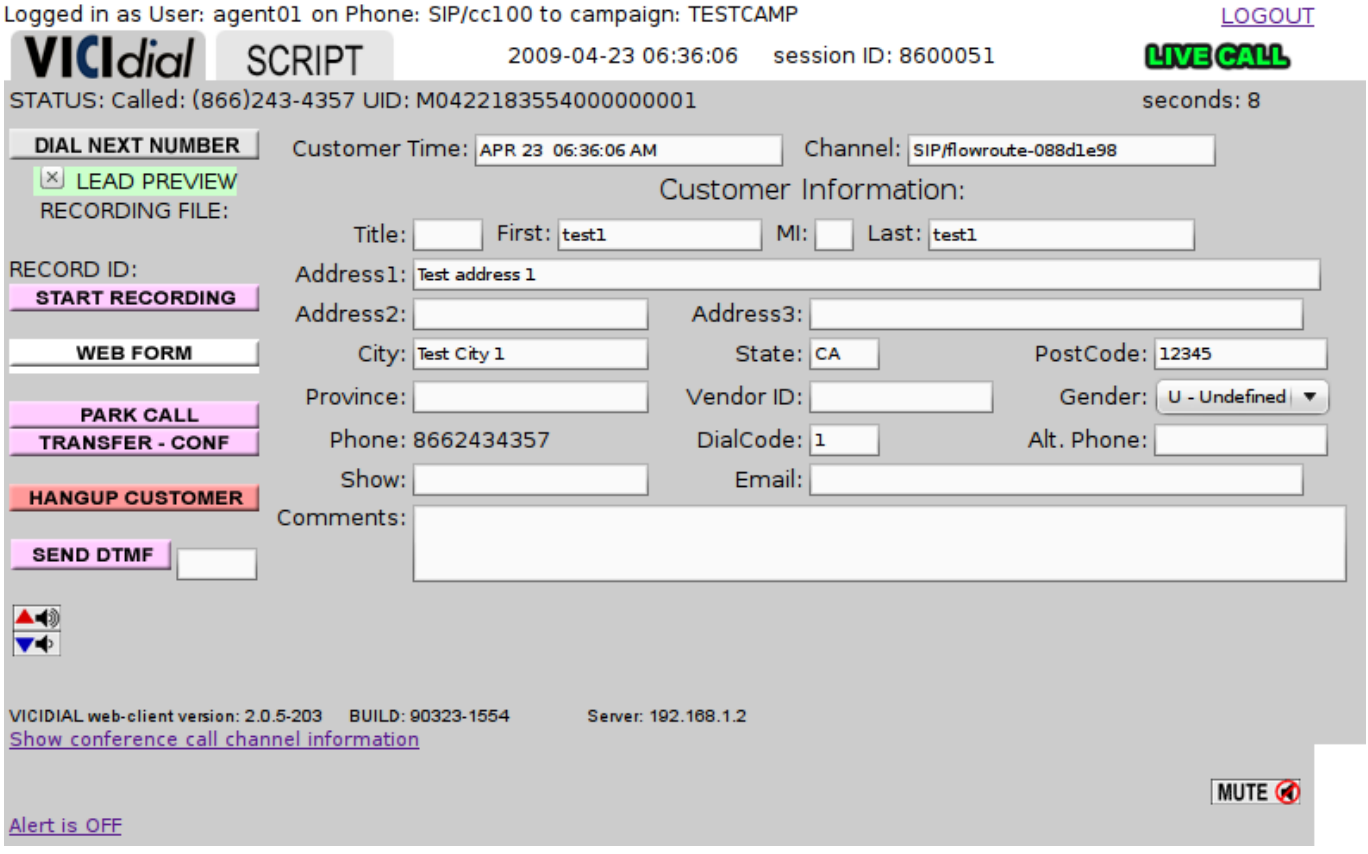


When you login, your phone (extension 100) will ring, answer it and you will hear something like "You are currently the only person in this conference" don't hang up until you logout form the Agent Interface.

Click LEAD PREVIEW > DIAL NEXT NUMBER > DIAL LEAD



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



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