



# Nimblevox Blast User's Guide

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2 Trap Falls Road

Shelton, CT 06484 1-203-926-0049

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# 1 Introduction

## 1.1 Identification

This document is for users of Nimblevox Blast.

## 1.2 Supported Browsers

To use Blast, the following are required:

- Internet Explorer (9 or higher), Chrome or Firefox (3.5 or higher)

*Note: Compatibility View for Internet Explorer is not supported. If enabled, some screens may display incorrectly.*

- Javascript must be enabled on the browser

## 1.3 System Overview

Blast is an easy-to-use, cloud-based Outbound IVR and Voice Broadcasting solution using DTMF, AMD and ASR. It provides the ability to send your message to your audience in bulk simply by creating a campaign. You can use the built in Blast and Direct Message applications or create your own custom application using our Nimblevox Build tool. Campaigns can be customized based on your specific needs and audience. They can be configured to run for a date and time range, play separate messages based on whether the call is answered or sent to voicemail or an answering machine, allow your customers to opt out of future calls and stop once specific criteria has been met.

Campaigns can be created using the GUI or by simply FTPing a template file and csv file into a specified directory on the webserver. These files are then processed periodically and campaigns are automatically generated.

Examples uses:

- Political calls
- Appointment/payment/service reminders
- Retail marketing/surveys
- Emergency notifications
- Wake up calls

## 1.4 Document Overview

This document contains screen shots and instructions on how to add and edit campaigns. It also contains information how to create customer and search for and export CDRs.

The following formatting conventions are used within the guide:

- All notes are indented and *italicized*.
- All field names are in **bold**.

## 1.5 Terminology and Acronyms

**AMD** - Answering Machine Detection, may be provided by a 3rd party speech engine or may use innate capabilities in the Nimblevox Engine.

**ASR** - Automatic Speech Recognition, typically provided by a 3rd party speech engine.

**CDR** - Call Detail Record, a historical record of the blast voice call.

**DNC** - Do Not Call list.

**DTMF** - Dual-Tone Multi-Frequency

**IVR** - An Interactive Voice Response system.

**MDR** - Message Detail Record, a historical record of the blast SMS.

**Nimblevox Engine** - A pure software voice application engine used to create a VoIP IVR on a Linux server.

**SIP** - Session Initiation Protocol, an IETF protocol for call control over the Internet.

**SPOT** - An acronym meaning "Speech Processing of Tomorrow". A pair of VoiceXML and CCXML Interpreters.

**TTS** - Text to Speech, typically provided by a 3rd party speech engine.

**VoIP** - Voice over Internet Protocol, descriptor for packet switched telephony over the Internet.

## 1.6 References

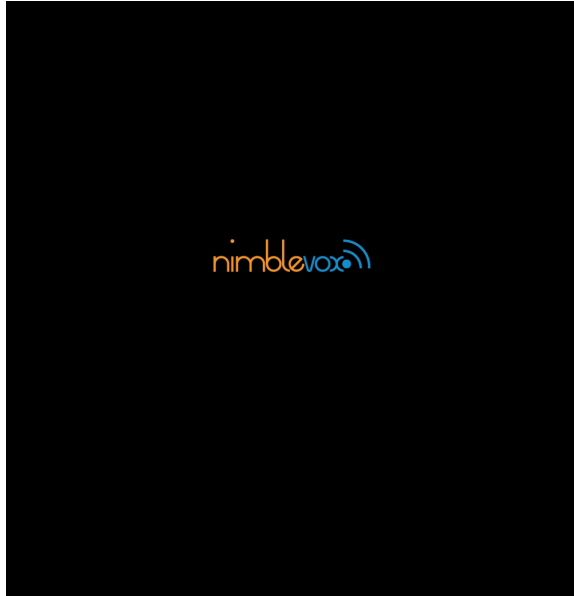
Nimblevox Build User's Guide



## 2 Login

To access Blast, you must first have a Nimblevox account (*go to [www.nimblevox.com](http://www.nimblevox.com) to create an account*). Once you have an account setup, log in through the main Nimblevox page.

1. Go to [www.nimblevox.com](http://www.nimblevox.com)



Username  
jane.smith@gmail.com

Password  
\*\*\*\*\*

**LOGIN** [Register / Login help](#)

2. Enter your username and password.
3. Click Login. The Nimblevox Dashboard screen is displayed.

Balance: \$51.00 jane.smith@gmail.com [ [Log Out](#) ]

**nimblevox**

Home Numbers Storage Billing Reports Settings

**Dashboard**

**Metrics**

All Numbers

Calls In: 1

Calls Out: 1

SMS In: 0

SMS Out: 0

All Applications

Calls In: 1

Calls Out: 1

All Campaigns

List: 4743

Calls: 521

Answer: 265

Live: 141

Machine: 124

No Answer: 69

Busy: 87

Other: 100

**Live Calls**

0

**Calls In/Out**

10.0

7.5

5.0

2.5

0.0

10.13 10.16 10.19 10.22 10.25

**SMS In/Out**

10.0

7.5

5.0

2.5

0.0

10.13 10.16 10.19 10.22 10.25

**Build**

Build your application

**Launch build**

**Blast**

Manage your outbound campaign

**Launch blast**

**API Key**

Use your API key for privileged access to our suite of apis. For more details visit our api [documentation](#).

skOqrJ9AqR1eq9tNPNDj9bqv74ndR8F8e9dpwtgn9vX94TLhf8h7yd4Us72Rfo

4. Click the Launch blast button. A separate window is opened for Blast.

*Note: if you are unable to access the Blast application, it may be because new users are blocked by default. Please contact [Nimblevox Sales](#).*

DocSmith [ [Log Out](#) ]

nimblevox blast

Campaigns

CDRs

MDRs

DNCs

Inbound SMS

Contact List

Campaign List

Add Voice Campaign

Add SMS Campaign

Archived Campaign List

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Need assistance? [support@nimblevox.com](mailto:support@nimblevox.com)  
Documentation [Nimblevox Blast User's Guide](#)

### 3 Voice Campaigns

There are several types of voice campaigns:

- **Blast** - A Blast campaign allows you to upload or write and play a separate message based on whether the call is answered or sent to voicemail or a answering machine. The ability to allow your customers to press 1 to talk to an agent or press 9 to opt out of future calls is also available.
- **Custom** - A Custom campaign uses a custom application that is created and deployed under your Nimblevox user account on Build. You have the ability to upload your message to the application or use Text to Speech (TTS) to create your message (see *the Nimblevox Build User's Guide for details*).
- **Direct Message** - A Direct Message campaign drops your uploaded or text to speech (TTS) message directly to a mobile phone's voicemail (*without the phone ringing*).

*Note: This application is designed to work with only mobile phones that have an attached voicemail. Calling landlines could get unexpected results.*

- **Survey** - A Survey campaign will present your call recipients with a survey you have defined in a survey definition file.

#### 3.1 Voice Campaign List

The Voice Campaign List screen displays all non-archived voice campaigns that you have created. The following can be performed from this screen:

- Add a new voice campaign by clicking the Add Voice Campaign button (see [Section 3.2, "Add Voice Campaign"](#) for details)
- View a listing of archived campaigns by clicking the Archived Campaign List button (see [Section 3.3, "Archived Campaign List"](#) for details)
- View or edit an existing campaign by clicking on the campaign name (see [Section 3.4, "Show Voice Campaign"](#) for details)
- Pause or resume a campaign by clicking the Pause or Resume button (see [Section 3.4.1, "Pause/Resume Campaign"](#) for details)

<a href="#">Campaign List</a>	<a href="#">Add Voice Campaign</a>	<a href="#">CDRs</a>	<a href="#">Archived Campaign List</a>
-------------------------------	------------------------------------	----------------------	----------------------------------------

Voice Campaign List

Name	Start Date	End Date	User	Pending	Active	Completed	
Voice Demo	2016-08-18	2016-08-18	Admin	0	0	0	<a href="#">Resume</a>

*Note: The campaigns are listed in order of creation by default (newest to oldest), but can be re-organized by Name, Start Date, End Date or Customer. Only 10 campaigns are displayed at a time. To view additional campaigns, click the page number or Next button.*

#### Campaign List Field Definitions

*Note: While a campaign is running, the Pending, Active and Completed counts may not be accurate. Final counts are calculated and displayed once complete.*

**Name:** The name of the campaign.

**Start Date:** The start date of the campaign.

**End Date:** The end date of the campaign.

**User:** The name of the user associated with the campaign.

*Note: This should always be your username, unless you are a Custodian.*

**Pending:** The number of phone numbers loaded for the campaign waiting to be called.

**Active:** The number of phone numbers actively being called.

**Completed:** The number of phone numbers that have been successfully called.

*Note: A "successful" call can be any disposition based upon how retries are configured for the campaign. If no retries are configured, then calls for all dispositions are considered successful; or calls may be automatically placed back into Pending, if retries (by disposition or milestone) are configured. See ??? for details.*

**Pause/Resume/Uploading:** The Pause button is displayed for all active campaigns (*Not Started/Started*) and the Resume button is displayed for currently paused campaigns. When the Pause button is clicked, all active calls are completed, but no new calls are initiated. When the Resume button is clicked, the calls are again initiated for the campaign. The word 'Uploading' is displayed while the phone numbers are being uploaded for the campaign. These campaigns are a blue.

*Note: Neither the Pause nor Resume button is displayed once the campaign is completed.*

To indicate the campaigns current state, the campaign information is color coded. The following states are possible:

- **Not Started:** The campaign has not yet reached the start date and or start time. These campaigns are a dark gray (e.g. *Example1*).
- **Not Started - Paused:** The campaign had not yet reached the start date and or start time when it was paused by the user. The campaign remains in the paused state (*even once the start date and start time have been reached*) until the user clicks the Resume button. These campaigns are a dark gray (e.g. *Example9* or *Example10*).
- **Started:** The campaign has reached the start date and start time and is actively making calls. These campaigns are a dark gray.
- **Started - Paused:** The campaign reached the start date and start time and started to make calls, but was then paused by the user. Any active calls were completed, but no new calls are made. These campaigns are a dark gray (e.g. *Example3*).
- **Started - Campaign Quota Met:** The campaign has started, but was stopped because the configured campaign quota was met. The campaign will not resume, even if configured to continue the next day, unless edited by the user. These campaigns are a red (e.g. *Example6*).
- **Started - Daily Quota Met:** The campaign has started, but was stopped because the configured daily quota was met. If the campaign is configured to continue (*end date is in the future*), it will resume at the start time and continue until completed or the daily quota is again met. These campaigns are an orange (e.g. *Example4*).
- **Started - Milestone Quota Met:** The campaign has started, but was stopped because the configured milestone quota was met. The campaign will not resume, even if configured to continue the next day, unless edited by the user. These campaigns are a burgundy (e.g. *Example2*).
- **Completed:** The campaign has passed the end date and end time (*based on HST*) and has been processed as complete. These campaigns are a light gray (e.g. *Example1*).
- **Completed - Paused:** The campaign has passed the end date and end time (*based on HST*) and has been processed as complete while the campaign was paused. These campaigns are a light gray.

## 3.2 Add Voice Campaign

1. To add a new campaign, click the Add Voice Campaign button.
2. The Create Campaign screen is displayed. Enter the required information:

[Campaign List](#)
[Add Voice Campaign](#)
[CDRs](#)
[Archived Campaign List](#)

---

Create Voice Campaign

Name*	<input type="text" value="Blast Campaign"/>
Contact List*	<input type="text" value=""/>
Start Date*	<input type="text" value="2016-08-18"/>
End Date*	<input type="text" value="2016-08-18"/>
Start Time*	<input type="text" value="09:00"/>
End Time*	<input type="text" value="17:00"/>
Repeat Campaign	<input type="checkbox"/>
Active Days of the Week	<input checked="" type="checkbox"/> S <input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> W <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> F <input checked="" type="checkbox"/> S
Email Results	<input checked="" type="checkbox"/>
Caller ID*	<input type="text" value="(402) 476-8786"/>
Paused	<input checked="" type="checkbox"/>
Campaign Type*	<input type="text" value=""/>

[Show advanced settings...](#)

☐ I agree to the [Terms of Service](#)

### Create Campaign Field Definitions

*Note: All fields with an asterisk (\*) following the name are required for a campaign.*

**Name\*:** The name of the campaign. This can be up to 100 characters.

**Contact List\*:** The name of the contact list to use for the campaign. This dropdown will also include an option for "-- Upload CSV File --" so you can upload a file for one-time use without generating a contact list.

**Start Date\*:** The date to start the campaign. The date can be entered in the format indicated by the field mask or selected from the calendar.

**End Date\*:** The date to end the campaign. The date can be entered in the format indicated by the field mask or selected from the calendar.

**Start Time\*:** The time (*hh(24):mm*) to start the campaign each day. This can be between 00:00 and 23:59.

**End Time\*:** The time (*hh(24):mm*) to stop the campaign each day. This can be between 00:00 and 23:59.

**Repeat Campaign:** Note this field will be hidden if you upload your contact list. If you select a pre-set contact list then you can check this box if you want the campaign to repeat daily or weekly.

**Repeat Interval\*:** Note this field will be hidden if the campaign is not repeatable. Choose Daily or Weekly.

**Active Days of the Week:** The days of the week to run the campaign. All days of the week are selected by default. If the campaign should not run on a particular day of the week the box associated with that day should be unchecked. For example: If the campaign should not run on the weekend,

uncheck the boxes associated with Saturday and Sunday, which are the first and last checkboxes with 'S'.

**Email Results:** If checked (*default*), a zip file containing an Excel spreadsheet of all exported CDRs is sent on campaign completion. The zip file is attached to an email that is sent to the email address configured on your Nimblevox account.

**Caller ID\*:** The phone number to display as the caller id for outbound calls.

**Paused:** If checked, the campaign is created in the Paused state and will not start until manually resumed.

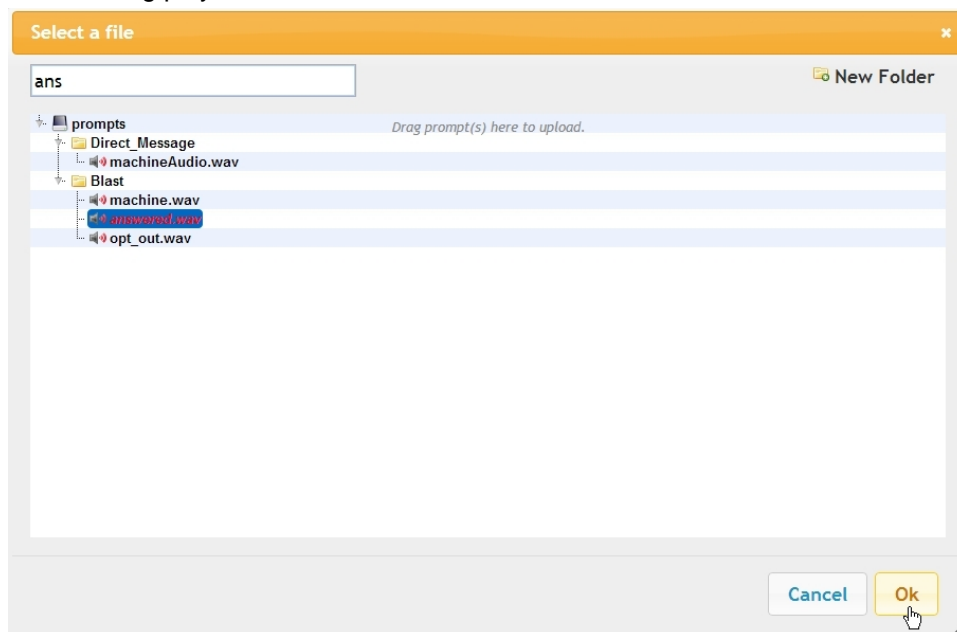
**Campaign Type\*:** The type of campaign. There are three types available:

- **Blast:** A Blast campaign uses the default Blast application. This application requires you to upload or write in (TTS) both an Answered Prompt (*call is answered*) and an Answering Machine Prompt (*call is not answered and goes to their voicemail or answering machine*) to be played. An optional Opt Out Prompt can also be uploaded.

The screenshot shows a configuration interface with the following elements:

- Answered Prompt\*:** A text input field containing "A blast from the past!" with a "File" button and a "TTS" button.
- Answering Machine Prompt\*:** A text input field containing "Machine.wav" with a "File" button and a "TTS" button.
- Live Agent Transfer:** A checkbox.
- Disable Opt Out:** A checkbox.
- Opt Out Prompt\*:** A text input field containing "Opt Out Example" with a "File" button and a "TTS" button.

**Answered Prompt\*:** The prompt or text to speech (TTS) played if the call is answered. Click the File button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok. If you would like to use text to speech (TTS), click the TTS button and write in your text. If you would like to use custom key/value pairs within the TTS, use the format `${key}` and it will be replaced within the text before being played.



### Notes:

- To search for a specific prompt, start typing the name in the box at the top. As you type, folders are expanded and matching records change to red.

- If the prompt required is not displayed, it can be uploaded on the fly by dragging the prompt from your computer and dropping it on the screen. Once uploaded, it is available for all future campaigns.
- The file format must be wav format and cannot exceed 100MB in size. If the name of the wav file contains spaces, they are replaced with '\_' on upload.
- You can also rename prompts, add/remove/rename folders or reorganize prompts within folders.
- Prompts can also be maintained through your Nimblevox account via the Storage tab.
- TTS prompts can use the custom key/value pairs included in the CSV file or contact list. To include the key/value pair, simply put \${key} where you want value to show.

**Answering Machine Prompt\*:** The prompt played if the call is not answered and it goes to their answering machine. Click the File button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok. If you would like to use text to speech (TTS), click the TTS button and write in your text.

**Live Agent Transfer:** If checked, this campaign becomes a Press 1 Campaign. This means the called party can press 1 to speak with a live agent. The answered prompt should include instructions to the called party so that they know they have the press 1 option.

- **Live Agent Number\*:** This is the phone number the application will dial if the called party presses 1.
- **Whisper Prompt:** This is a prompt to play to the agent once the outdial to the live agent is connected. If the agent receives calls for multiple clients, the whisper will let them know which client script to use.

**Disable Opt Out:** If checked, the Opt Out Prompt field is no longer displayed and no opt out prompt is played during the campaign. If not checked (*default*), then an opt out prompt is required.

**Opt Out Prompt:** The prompt played to inform the called party of their right to opt out of future campaigns. Click the File button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok. If you would like to use text to speech (TTS), click the TTS button and write in your text. If you would like to use custom key/value pairs within the TTS, use the format \${key} and it will be replaced within the text before being played.

- **Custom:** A Custom campaign uses a custom application which is created and deployed under your Nimblevox user account on Build (see the *Nimblevox Build User's Guide* for details).

**Service Name/ID\*:** Depending on configuration, either the Service Name drop-down field or Service ID input field is displayed. If Service Name is displayed, all deployed services under your Nimblevox user account are displayed in the drop-down. Select the desired service name. If Service ID is displayed, enter the ID for the desired service (*the ID can be found on the Deploy Application screen within Build*).

- **Direct Message:** A Direct Message campaign uses the default Direct Message application. This application requires you to upload just an Answering Machine Prompt or input a TTS message because the application drops the message directly to the mobile phone's voicemail.



**Answered Prompt:** The prompt played if the call is answered. Click the File button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok. If you would like to use text to speech (TTS), click the TTS button and write in your text. This is optional for Direct Message campaigns. If you would like to use custom key/value pairs within the TTS, use the format \${key} and it will be replaced within the text before being played.

**Answering Machine Prompt\*:** The prompt played to the called party's answering machine. Click the File button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok. If you would like to use text to speech (TTS), click the TTS button and write in your text. If you would like to use custom key/value pairs within the TTS, use the format \${key} and it will be replaced within the text before being played.

- **Direct Message:** A Direct Message campaign uses the default Direct Message application. This application requires you to upload just an Answering Machine Prompt because the application drops the message directly to the mobile phone's voicemail. However, if you want the phone to ring if the call cannot be diverted to voicemail, then you can optionally choose an Answered Prompts as well.

**Answered Prompt:** The prompt played if the call is answered. Click the File button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok. If you would like to use text to speech (TTS), click the TTS button and write in your text. This is optional for Direct Message campaigns. If you would like to use custom key/value pairs within the TTS, use the format \${key} and it will be replaced within the text before being played.

**Answering Machine Prompt\*:** The prompt played to the called party's answering machine. Click the File button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok. If you would like to use text to speech (TTS), click the TTS button and write in your text. If you would like to use custom key/value pairs within the TTS, use the format \${key} and it will be replaced within the text before being played.

- **Survey:** A Survey campaign uses the default Survey application. This application requires only the survey definition file, but will allow an introductory Answered Prompt and an Answering Machine Prompt as well.

**Survey:** The survey definition file that will be used if the call is answered. Click the Choose Survey button to display the Select a file screen with your stored surveys. Select the survey you wish to use and click Ok. For information on creating a survey definition file, see [Section 11, "Appendix B. Survey Definition Files"](#).



**Answered Prompt:** The prompt played if the call is answered. Click the File button to display the Select a file screen. Select the prompt you wish to use and click Ok. If you would like to use text to speech (TTS), click the TTS button and write in your text. This field is optional. If selected, it will play this prompt prior to running the survey. If you would like to use custom key/value pairs within the TTS, use the format \${key} and it will be replaced within the text before being played.

**Answering Machine Prompt\*:** The prompt played to the called party's answering machine. Click the File button to display the Select a file screen. Select the prompt you wish to use and click Ok. If you would like to use text to speech (TTS), click the TTS button and write in your text. This field is optional. If no prompt is selected, the IVR will hang up if it encounters an answering machine. If you would like to use custom key/value pairs within the TTS, use the format \${key} and it will be replaced within the text before being played.

- **Contact List\*:** You can select either a contact list, or -- Upload CSV File -- to utilize with your campaign. Contacts are automatically added to the campaign if a contact list is selected. If you select -- Upload CSV File --, a file prompt will come up and allow you to select a file containing the phone numbers to be called. The file format must be csv and not exceed 100MB in size. It needs to contain a header record and new line for each phone number. The only required field is TN, which is the phone number. Additional custom value/pairs, each separated by a comma (,), can also be included. The custom value/pairs are included in the CDR detail (see [Section 5, "CDRs" for additional information](#)).

*Example files:*

- TN  
4025551111  
14025552222  
(402)555-3333

*Notes:*

- If the number is 10 digits, a leading 1 is added on import.
- If the number is greater than 10 digits, no changes are made on import.

*Note: The number must be less than 20 digits.*

- Any formatting of the phone number is removed on import.
- TN,Name,Email  
4025551111,John Smith,smithj@gmail.com  
14025552222,Jane Doe,jane.doe@msn.com  
1-402-555-3333, Joe Black,blackj@hotmail.com

*Note: All records must contain all of the custom value/pairs or an exception is written on upload and the phone number is not included in the campaign.*

Ignore Time Zone Restrictions ☐

Max Concurrent Calls\*  (Limit: 10)

Default Retry Count\*

Default Retry Delay (secs)\*

Add Disposition Retry

Disposition Retries  Retry Count  Retry Delay (secs)

Add Milestone Retry

Milestone  Retry Count  Retry Delay (secs)

Add Milestone Quota

Milestone  Quota Amount

Disposition Quota

Quota Amount\*

Daily Quota Disposition

Allow Duplicate Phone Numbers ☐

[Hide advanced settings...](#)

## Advanced Settings

*Note: These settings are optional. The fields with an asterisk (\*) following the name are required for a campaign, but all have default values.*

**Ignore Timezone Restrictions:** If checked, any timezone restrictions setup are ignored.

**Max Concurrent Calls\*:** The maximum number of calls to send to the IVR at once. Note that each account has a channel limit. You may set the max concurrent calls for any individual campaign to any value between 0 (no calls will be sent) to your account channel limit. If you are running multiple campaigns and the total concurrent calls across all campaigns exceeds the limit for your account, the Blast call generator will still limit the total number of active calls across all active campaigns to your account limit.

*If you would like to increase your account channel limit, please contact [Nimblevox Sales](#).*

**Default Retry Count\*:** The number of retries made for each phone number where the disposition returned was System Error or Other. If set to 0, no retries are automatically performed.

**Default Retry Delay (secs)\*:** The number of seconds to wait before performing a retry. The default is 3600 seconds.

**Direct Msg Ring Time (secs)\*:** The number of seconds to wait before disconnecting the call if it has not yet been deflected to the mobile phone's voicemail. This is used in an attempt to keep the called party's phone from ringing. The default value is 5.0 seconds.

*Note: This only applies to Direct Message campaigns.*

**Add Disposition Retry:** Click the + button to add a retry based on a specific disposition returned for the call. Multiple disposition retries can be configured per campaign; one per disposition.

**Disposition Retries:** Select the disposition to retry. Available options are: Busy, No Answer, Other, System Error, SIT or Fax.

**Retry Count:** The number of times to perform the retry.

**Retry Delay (secs):** The number of seconds to wait before performing a retry. The default is 3600 seconds.

**Add Milestone Retry:** Click the + button to add a retry based on a specific milestone reached during the call. Multiple milestone retries can be configured per campaign; one per milestone.

*Note: The call must end and the CDR written with the specified milestone for the call to be retried.*

**Milestone:** Enter the milestone to retry. The wording must be exactly the same as configured in the application used for the campaign (see the *Nimblevox Build User's Guide for information on how to add milestones within your custom application*).

The following milestones are available for Blast and Direct Message (or as indicated):

- Empty - Set at beginning of call.

- Progressing - Call reached the progressing state. Call not yet connected.
- Connected - Call was connected.
- Waiting Machine Tone - The system detected a machine but never heard a tone. No message played.
- No Human Audio - The call was answered, but there was no human prompt configured for the campaign.
- Human Audio Started - The human audio started to play.
- Human Audio Completed - The entire human audio was played.
- Human Audio Interrupted - The human audio started to play, but did not complete because the called party hung up.
- No Machine Audio - The call was answered by an answering machine, but there was no human prompt configured for the campaign.
- Machine Audio Started - Answering machine was detected and the machine audio started to play.
- Machine Audio Completed - Answering machine was detected and the entire machine audio was played.
- Machine Audio Interrupted - The machine audio started to play, but did not complete due to a disconnect.
- Constituent Opted Out (*Blast only*) - The entire human audio was played and the called party opted out of future campaigns.
- Ring Timer Exceeded (*DM only*) - The call was not answered/deflected prior to the configured value.
- Completed Survey (Survey only) - The called party completed the survey. Note that for those that didn't complete the survey, the last question they answered is recorded as a milestone, named for the lineid of the last question answered as set in the survey definition file.
- Fax Detected - Fax was detected.
- S.I.T. Detected - A Special Information Tone (SIT) was detected.

Note that Survey milestones also include:

- Completed Survey
- Completed <lineid from the survey definition file>

**Retry Count:** The number of times to perform the retry.

**Retry Delay (secs):** The number of seconds to wait before performing a retry. The default is 3600 seconds.

**Add Milestone Quota:** Click the + button to add a milestone quota. Multiple milestone quotas can be configured for the campaign; one per milestone. Once any one of the configured quotas is met, the campaign is considered complete and no further calls are initiated.

*Note: The call must end and the CDR written with the specified milestone for the call to count towards the quota.*

**Milestone:** Enter the milestone to retry. The wording must be exactly the same as configured in the application used for the campaign (*see the Nimblevox Build User's Guide for information on how to add milestones within your custom application*). *See above for the available milestones for Blast and Direct Message campaigns.*

**Quota Amount:** The number at which the quota is met.

**Disposition Quota:** Select the disposition to use for the campaign quota. Available dispositions are: Answering Machine, Answered, Busy, No Answer, Other, System Error, SIT and Fax. When

the disposition quota is met, the campaign is considered complete and no further calls are initiated. There can be only one disposition quota per campaign.

*Note: The call must end and the CDR written with the specified disposition for the call to count towards the quota.*

**Quota Amount\*:** The number at which the quota is met.

**Daily Quota Disposition:** Select the disposition to use for the daily quota. Available dispositions are: Answering Machine, Answered, Busy, No Answer, Other, System Error, SIT and Fax. When the daily disposition quota is met, the campaign is considered complete for the day and no further calls are initiated. The following day (*if the end date has not been reached*), the quota is reset and the campaign is resumed. There can be only one daily quota per campaign.

*Note: The call must end and the CDR written with the specified disposition for the call to count towards the quota.*

**Daily Quota Amount\*:** The number at which the quota is met.

**Allow Duplicate Phone Numbers:** If checked, all records from the import file with duplicate phone numbers are imported. An exception is written for each duplicate for informational purposes. If not selected (*default*), all records with duplicate phone numbers (*except for the first record*) are removed and an exception is written.

3. Read the Terms of Service.
4. Click the Terms of Service checkbox. The Create button is now available.

☒ I agree to the [Terms of Service](#)

5. Click the Create button to create the campaign. Else click the Cancel button.

☒ I agree to the [Terms of Service](#)

6. The campaign is created. The Show Campaign screen is displayed with the campaign information.

*Note: While the phone numbers are being uploaded, the message 'Currently uploading phone numbers' remains displayed and not all of the campaign detail can be seen until the upload is complete.*

Campaign List
Add Campaign
Archived Campaign List
CDR

Campaign Basic Campaign created.  
Currently uploading constituents

Show Campaign

Name: Basic Campaign  
Start Date: 10/29/2012  
End Date: 10/29/2012  
Start Time: 1:00 PM  
End Time: 4:00 PM  
Active Days of the Week: ☒ S ☒ M ☒ T ☒ W ☒ T ☒ F ☒ S  
Email Results: ☒  
Campaign Type: Blast  
Caller ID: 4024768786  
Answered Prompt: answered.wav  
Answering Machine Prompt: machineAudio.wav  
Disable Opt Out: ☐  
Opt Out Prompt: opt\_out.wav  
[Show advanced settings...](#)

Retry Configurations

Default Retry Count: 0  
Default Retry Delay (secs): 3,600

Disposition Retries	Retry Count	Retry Delay (secs)
No Answer	1	1,800

Milestone Retries	Retry Count	Retry Delay (secs)
Started human audio	1	3,600

Daily Quota Configurations

Quota Configurations

Disposition Quota	Quota Amount
Answered	4

7. To view all of the campaign detail, press F5 to refresh the screen. See [Section 3.4, “Show Voice Campaign”](#) for details on the fields displayed.

### 3.3 Archived Campaign List

The Archived Campaign List screen displays all archived campaigns. The following can be performed from this screen:

- View a listing of current campaigns by clicking the Campaign List button (see [??? for details](#))
- Add a new campaign by clicking the Add Campaign button (see [??? for details](#))
- View an archived campaign by clicking on the campaign name (see [Section 3.4, “Show Voice Campaign” for details](#))
- Unarchive a campaign by clicking the Unarchive button (see [Section 3.4.7, “Archive/Unarchive Campaign” for details](#))

Campaign List	Add Campaign	Archived Campaign List
---------------	--------------	------------------------

Archived Campaign List					
Name	Start Date	End Date	Start Time	End Time	
Campaign 1	10/1/12	10/3/12	8:00 AM	4:00 PM	Unarchive
Test Campaign	9/15/12	9/30/12	1:00 PM	9:00 PM	Unarchive

*Note: The campaigns are listed in alphabetical but can be re-organized by Name, Start Date, End Date, Start Time or End Time. Only 10 campaigns are displayed at a time. To view additional campaigns, click the page number or Next button.*

### Archived Campaign List Field Definitions

**Name:** The name of the campaign.

**Start Date:** The start date of the campaign.

**End Date:** The end date of the campaign.

**Start Time:** The start time (hh:mm AM/PM) of the campaign.

**End Time:** The end time (hh:mm AM/PM) of the campaign.

**Unarchive:** The Unarchive button is displayed for all campaigns. If clicked, the campaign is moved back to the Campaign List screen.

## 3.4 Show Voice Campaign

The Show Campaign screen displays all of the campaign details. From this screen, the following options may be available (*depending on the campaign state*):

- Pause/resume a campaign (see [Section 3.4.1, "Pause/Resume Campaign" for details](#))
- Edit the campaign (see [Section 3.4.2, "Edit Campaign" for details](#))
- Refresh the campaign information (see [Section 3.4.3, "Refresh" for details](#))
- Remove phone number(s) (see [Section 3.4.4, "Remove Phone Number" for details](#))
- View import exceptions (see [Section 3.4.5, "View Import Exceptions" for details](#))
- Reset calls by their final call disposition (see [Section 3.4.6, "Reset by Final Call Disposition" for details](#))
- Archive/unarchive a campaign (see [Section 3.4.7, "Archive/Unarchive Campaign" for details](#))

1. Click the name of the campaign you wish to view.

Campaign List	Add Campaign	Archived Campaign List
---------------	--------------	------------------------

Campaign List						
Name	Start Date	End Date	User	Pending	Active	Completed
Basic Campaign	10/29/2012	10/29/2012	Customer ABC	4	0	0

2. The Show Campaign screen is displayed.

At the top of the screen, a CDR button appears in the navigation menu. If you click the CDR button, you will navigate to the Call Detail List pre-loaded with call detail records for the displayed campaign (see [Section 5.1, "Call Detail List" for more details](#)).

[Campaign List](#)
[Add Campaign](#)
[Archived Campaign List](#)
[CDR](#)

### Show Campaign

[Resume](#)

Name Basic Campaign  
 Start Date 10/29/2012  
 End Date 10/29/2012  
 Start Time 1:00 PM  
 End Time 4:00 PM  
 Active Days of the Week ☒ S ☒ M ☒ T ☒ W ☒ T ☒ F ☒ S  
 Email Results ☒  
 Campaign Type Blast  
 Caller ID 4024768786  
 Answered Prompt answered.wav  
 Answering Machine Prompt machineAudio.wav  
 Disable Opt Out ☐  
 Opt Out Prompt opt\_out.wav

[Show advanced settings...](#)

### Retry Configurations

Default Retry Count 0  
 Default Retry Delay (secs) 3,600

Disposition Retries	Retry Count	Retry Delay (secs)
No Answer	1	1,800

Milestone Retries	Retry Count	Retry Delay (secs)
Started human audio	1	3,600

### Daily Quota Configurations

#### Quota Configurations

Disposition Quota	Quota Amount
Answered	4

### Final Call Dispositions

### Active Campaign Stats

Status Not Started - Paused  
 Campaign Quota Met False  
 Daily Quota Met False  
 Milestone Quota Met False  
 Processed 0

### Last Import Summary

Processed	7	<a href="#">Export Summary to CSV</a>
Imported	4	
Duplicates Removed	1	
Do Not Call Removed	1	
Defaulted Time Zone entries	1	
Errors	1	

### Phone Number Summary

Current	4	<a href="#">Export Constituent Status to CSV</a>
Removed Phone Numbers	0	
Duplicates	0	

[Edit](#)
[Refresh](#)
[Remove Phone Number](#)
[View Import Exceptions](#)

### Show Campaign Field Definitions



*Note that some fields may not be displayed if they are not used for the selected campaign.*

**Name:** The name of the campaign.

**Start Date:** The start date of the campaign.

**End Date:** The end date of the campaign.

**Start Time:** The start time (*hh:mm AM/PM*) of the campaign.

**End Time:** The end time (*hh:mm AM/PM*) of the campaign.

**Repeat Campaign:** Indicates whether or not the campaign is repeatable.

**Active Days of the Week:** The days of the week the campaign will run.

**Email Results:** If checked, a zip file containing an Excel spreadsheet of all exported CDRs is sent on campaign completion. The zip file is attached to an email that is sent to the email address configured on your Nimblevox account.

**Campaign Type:** The type of campaign. There are three types available:

- **Blast:** A Blast campaign uses the default Blast application. This application requires an Answered Prompt (*call is answered*) and Answering Machine Prompt (*call is not answered and it goes to their voicemail or answering machine*) to be played with an optional Opt Out Prompt.
  - Answered Prompt:** The prompt played if the call is answered.
  - Answering Machine Prompt:** The prompt played if the is not answered and it goes to their answering machine.
  - Disable Opt Out:** If checked, the Opt Out Prompt field is no longer displayed and no opt out prompt is played during the campaign.
  - Opt Out Prompt:** The prompt played to inform the called party of their right to opt out of future campaigns.
- **Custom:** A Custom campaign uses a custom application which is created and deployed under your Nimblevox user account on Build (*see the Nimblevox Build User's Guide for details*).
  - Service Name/ID:** Depending on configuration, either the Service Name or Service ID for the application.
- **Direct Message:** A Direct Message campaign uses the default Direct Message application. This application requires you to upload just an Answering Machine Prompt because the application drops the message directly to the mobile phone's voicemail.

**Answered Prompt:** The prompt played if the call is answered.

**Answering Machine Prompt:** The prompt dropped into the called party's voicemail.

**Caller ID:** The phone number to display as the caller id.

**Contact List:** The contact list assigned to this campaign.

### Advanced Settings

**Ignore Timezone Restrictions:** If checked, any timezone restrictions setup are ignored.

**Max Concurrent Calls:** The maximum number of calls to send to the IVR at once. Note that each account has a channel limit. You may set the max concurrent calls for any individual campaign to any value between 0 (no calls will be sent) to your account channel limit. If you are running multiple campaigns and the total concurrent calls across all campaigns exceeds the limit for your account, the Blast call generator will still limit the total number of active calls across all active campaigns to your account limit.

*If you would like to increase your account channel limit, please contact [Nimblevox Sales](#).*

**Direct Msg Ring Time (secs):** The number of seconds to wait before disconnecting the call if it has not yet been deflected to the mobile phone's voicemail. This is used in an attempt to keep the called party's phone from ringing.



*Note: This only applies to Direct Message campaigns.*

### Retry Configurations

**Default Retry Count:** The number of retries made for each phone number where the disposition returned is System Error or Other. If set to 0, no retries are performed.

**Default Retry Delay (secs):** The number of seconds to wait before performing a retry.

**Disposition Retries:** A separate line is displayed for each disposition to be retried, along with the number of retries (Retry Count) to perform and the number of seconds to wait before performing the retry (Retry Delay).

**Milestone Retries:** A separate line is displayed for each milestone to be retried, along with the number of retries (Retry Count) to perform and the number of seconds to wait before performing the retry (Retry Delay).

*Note: The call must end and the CDR written with the specified milestone for the call to be retried.*

### Daily Quota Configurations

**Daily Quota Disposition:** The disposition to use for the daily quota. Possible dispositions are: Answering Machine, Answered, Busy, No Answer, Other, System Error, SIT and Fax. When the daily disposition quota is met, the campaign is considered complete for the day and no further calls are initiated. The following day (*if end date has not been reached*), the quota is reset and the campaign is resumed.

*Note: The call must end and the CDR written with the specified disposition for the call to count towards the quota.*

**Daily Quota Amount:** The number at which the quota is met.

### Quota Configurations

**Disposition Quota:** The disposition to use for the campaign quota, along with the quota amount. Possible dispositions are: Answering Machine, Answered, Busy, No Answer, Other, System Error, SIT and Fax. When the disposition quota is met, the campaign is considered complete and no further calls are initiated.

*Note: The call must end and the CDR written with the specified disposition for the call to count towards the quota.*

**Milestone Quota:** A separate line is displayed for each milestone quota, along with the quota amount. Once any one of the configured quotas is met, the campaign is considered complete and no further calls are initiated.

*Note: The call must end and the CDR written with the specified milestone for the call to count towards the quota.*

### Final Call Dispositions

*Note: The information within this section is only displayed once a campaign has started and the first call has completed. The counts can be updated by clicking the Refresh button, however, they may not be accurate until the campaign is complete.*

- **Final Call Disposition:** A separate line is displayed for each call disposition with the following information:

- **Count:** The final number of calls that returned the specific call disposition.

*Note: If a call disposition is selected to be retried via Reset by Final Call Disposition, this value is reset to zero for that call disposition. Also, if retries are configured, the initial attempt is not recorded since the call is placed back in the Pending status.*

- **Percentage:** The percentage of calls for each call disposition. This is calculated as Count / Total.

*Note: The percentage is rounded (up/down) based on the thousandths decimal place.*

- **Total:** The total number of imported phone numbers called.

- **Contact Rate<sup>1</sup>:** The total number of contacted phone numbers (*Answering Machine and Answered dispositions*) and the percentage of calls answered.

### Final Call Milestones

*Note: The information within this section is only displayed once a campaign has started and the first call has completed. The counts can be updated by clicking the Refresh button, however, they may not be accurate until the campaign is complete. Only those milestones used within the campaign will be displayed. All others can be assumed to be zero.*

- **Milestone:** A separate line is displayed for each milestone with the following information:
  - **Count:** The final number of calls that returned the specific milestone.
 

*Note: If a call disposition is selected to be retried via Reset by Final Call Disposition, the milestone results will be adjusted accordingly. Also, if retries are configured, the initial attempt is not recorded since the call is placed back in the Pending status.*
  - **Percentage:** The percentage of calls for each milestone. This is calculated as Count / Total.
 

*Note: The percentage is rounded (up/down) based on the thousandths decimal place.*
- **Total:** The total number of imported phone numbers called.

### Active Campaign Stats

These are the current active statistics for the campaign. The counts can be updated by clicking the Refresh button, however, they may not be accurate until the campaign is complete.

**Status:** The current status of the campaign. Possible statuses are:

- **Not Started:** The campaign has not yet reached the start date and or start time.
- **Not Started - Paused:** The campaign had not yet reached the start date and or start time when it was paused by the user. The campaign remains in the paused state (*even once the start date and start time have been reached*) until the user clicks the Resume button.
- **Started:** The campaign has reached the start date and start time and is actively making calls.
- **Started - Paused:** The campaign reached the start date and start time and started to make calls, but was then paused by the user. Any active calls were completed, but no new calls are made.
- **Started - Campaign Quota Met:** The campaign has started, but was stopped because the configured campaign quota was met. The campaign will not resume, even if configured to continue the next day, unless edited by the user.
- **Started - Daily Quota Met:** The campaign has started, but was stopped because the configured daily quota was met. If the campaign is configured to continue (*end date is in the future*), it will resume the following day at the start time and continue until completed or the daily quota is again met.
- **Started - Milestone Quota Met:** The campaign has started, but was stopped because the configured milestone quota was met. The campaign will not resume, even if configured to continue the next day, unless edited by the user.
- **Completed:** The campaign has passed the end date and end time (*based on HST*) and has been processed as complete.
- **Completed - Paused:** The campaign has passed the end date and end time (*based on HST*) and has been processed as complete while the campaign was paused.

**Campaign Quota Met:** Whether or not the Disposition Quota has been met - False or True.

**Daily Quota Met:** Whether or not the Daily Quota Disposition has been met - False or True.

**Milestone Quota Met:** Whether or not the Milestone Quota has been met - False or True  
<milestone> Has Been Met

**Processed:** The number of calls processed, including retries. This is displayed for campaigns in all states.

**Answering Machine:** The number of calls that went to voicemail or an answering machine, including retries. This is displayed for started and completed campaigns.

**Answered:** The number of calls answered, including retries. This is displayed for started and completed campaigns.

**Busy:** The number of calls that received a busy signal, including retries. This is displayed for started and completed campaigns.

**No Answer:** The number of calls not answered and did not go to voicemail or an answering machine, including retries. This is displayed for started and completed campaigns.

**Other:** The number of calls not made due to an internal server error, including retries. This is displayed for started and completed campaigns.

**System Error:** The number of calls not made due to system errors (*e.g. timeouts, unable to communicate with IVR, etc.*), including retries. This is displayed for started and completed campaigns.

**SIT:** The number of calls that received a Special Information Tone (SIT), including retries. This is displayed for started and completed campaigns.

**Fax:** The number of calls that went to a fax machine, including retries. This is displayed for started and completed campaigns.

### Last Import Summary

**Processed:** The total number of phone numbers in the import file.

**Imported:** The total number of phone numbers that were actually imported for the campaign.

**Duplicates Removed/Allowed:** The number of phone numbers that were:

- removed (*not imported for the campaign*) because they were duplicates - Allow Duplicate Phone Number checkbox was not checked when importing the file.

OR

- allowed (*imported for the campaign*) even though they were duplicates - Allow Duplicate Phone Number checkbox was checked when importing the file.

**Do Not Call Removed:** The number of phone numbers that were removed (*not imported*) because they were on the customer's Do Not Call (DNC) list.

**Defaulted Time Zone entries:** The number of phone numbers imported with an unknown time zone (*area code not configured for a time zone*). These configured default time zone (CST) is applied to these numbers.

**Errors:** The number of phone numbers that were removed (*not imported*) due to errors (*e.g. phone number length invalid, unexpected custom parameters, etc*). To see the import errors for the campaign, click the View Import Exceptions button. See [Section 3.4.5, "View Import Exceptions"](#) for additional details.

**Export Summary to CSV:** Click this link to export a summary of the last phone list imported for the campaign to a CSV file. This contains the same information as displayed in this section.

### Phone Number Summary

**Current:** The number of current phone numbers assigned to the campaign.

**Removed Phone Numbers:** The number of phone numbers that have been removed from the campaign. See [Section 3.4.4, "Remove Phone Number"](#) for details.

**Duplicates:** The number of duplicate phone numbers assigned to the campaign.

**Export Constituent Status to CSV:** Click this link to export the list of this campaign's phone numbers along with their current status. Their custom data will be included as well.

### 3.4.1 Pause/Resume Campaign

All active campaigns (*Started/Not Started* states) can be paused/resumed.

#### Pause Campaign

The Pause button is displayed for all active campaigns. When clicked, all active calls are completed, but no new calls are initiated.

1. From the Show Campaign screen, click the Pause button.

Show Campaign

---



2. The campaign is paused. A message is displayed at the top indicating the campaign was successfully paused. The Resume button is now displayed.

Successfully paused campaign Basic Campaign

Show Campaign

---



#### Resume Campaign

The Resume button is displayed for all paused campaigns. When clicked, calls are again initiated for the campaign.

1. From the Show Campaign screen, click the Resume button.

Show Campaign

---



2. The campaign is resumed. A message is displayed at the top indicating the campaign was successfully resumed. The Pause button is now displayed.

Successfully resumed campaign Basic Campaign

Show Campaign

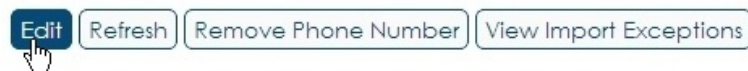
---



### 3.4.2 Edit Campaign

All active (*Started/Not Started*) campaigns can be edited, however, the editable fields are dependent on the campaign status.

1. From the Show Campaign screen, click the Edit button.



2. The Edit Campaign screen is displayed. Make the required updates.

## Edit Campaign

Name*	<input type="text" value="Blast Campaign"/>
Contact List*	<input type="text" value=""/>
Start Date*	<input type="text" value="10/29/2012"/>
Start Time*	<input type="text" value="13:00"/>
Active Days of the Week	<input checked="" type="checkbox"/> S <input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> W <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> F <input checked="" type="checkbox"/> S
End Date*	<input type="text" value="10/29/2012"/>
End Time*	<input type="text" value="16:00"/>
Repeat Campaign	No
Email Results	<input checked="" type="checkbox"/>
Caller ID*	<input type="text" value="4024768786"/>
Answered Prompt	<input type="button" value="Choose Prompt"/> answered.wav
Answering Machine Prompt*	<input type="button" value="Choose Prompt"/> machineAudio.wav
Disable Opt Out	<input type="checkbox"/>
Opt Out Prompt	<input type="button" value="Choose Prompt"/> opt_out.wav
Append Numbers	<input type="checkbox"/>
Upload Phone List*	<input type="button" value="Choose File"/> No file chosen
<a href="#">Show advanced settings...</a>	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

## Edit Campaign Field Definitions

*Note: All fields with an asterisk (\*) following the name are required for a campaign.*

**Name\*:** The name of the campaign. This can be up to 100 characters. This is editable on Not Started and Started campaigns.

**Contact List\*:** The list used by this campaign, if applicable. *Note that this cannot be modified once the campaign has started.*

**Start Date\*:** The date to start the campaign. The date can be entered in the format indicated by the field mask or selected from the calendar.

**End Date\*:** The date to end the campaign. The date can be entered in the format indicated by the field mask or selected from the calendar. This is editable on Not Started and Started campaigns.

**Start Time\*:** The time (*hh(24):mm*) to start the campaign each day. This can be between 00:00 and 23:59. This is editable on Not Started and Started campaigns.

**End Time\*:** The time (*hh(24):mm*) to stop the campaign each day. This can be between 00:00 and 23:59. This is editable on Not Started and Started campaigns.

**Repeat Campaign:** Indicates whether or not the campaign will repeat and with what frequency.

**Active Days of the Week:** The days of the week to run the campaign. This is editable on Not Started and Started campaigns.

**Email Results:** If checked (*default*), a zip file containing an Excel spreadsheet of all exported CDRs is sent on campaign completion. This is editable on Not Started and Started campaigns.

**Caller ID\*:** The phone number to display as the caller id. This is editable on Not Started and Started campaigns.

**Paused:** If checked, the campaign is created in the Paused state and will not start until manually resumed. This is not editable regardless of the campaign state.

**Campaign Type\*:** The type of campaign. This is not editable regardless of the campaign state.

- **For Blast Campaigns:**

**Answered Prompt\*:** The prompt played if the call is answered. Click the Choose Prompt button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok.

**Answering Machine Prompt\*:** The prompt played if the call is not answered and it goes to voicemail or an answering machine. Click the Choose Prompt button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok.

**Disable Opt Out:** If checked, the Opt Out Prompt field is no longer displayed and no opt out prompt is played during the campaign. If not checked (*default*), then an opt out prompt is required.

**Opt Out Prompt:** The prompt played to inform the called party of their right to opt out of future campaigns. Click the Choose Prompt button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok.

- **For Custom Campaigns:**

**Service Name/ID\*:** Depending on configuration, either the Service Name drop-down field or Service ID input field is displayed. If Service Name is displayed, all deployed applications under your Nimblevox user account are displayed in the drop-down. Select the desired application name. If Service ID is displayed, enter the UUID for the desired custom application (*the UUID can be found on the Deploy screen within Build*).

- **For Direct Message Campaigns:**

**Answered Prompt:** The prompt played if the call is answered. Click the Choose Prompt button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok. This is optional for Direct Message campaigns.

**Answering Machine Prompt\*:** The message dropped into the called party's voicemail. Click the Choose Prompt button to display the Select a file screen. All folders are collapsed by default. To expand, click the arrow to the left of prompts. Select the prompt you wish to use and click Ok.

**Append Numbers:** If checked and a new phone list is uploaded, the newly added phone numbers are appended to the existing list. If not checked, the existing phone numbers are removed and the new numbers uploaded in their place.

**Upload Phone List\*:** Click the Choose Prompt button to upload the file containing the phone numbers to be called. The file format must be csv and not exceed 100MB in size. It needs to contain a header record and new line for each phone number. The only required field is TN, which is the phone number. Additional custom value/pairs, each separated by a comma (,), can also be included. The custom value/pairs are included in the CDR detail (see [Section 5, "CDRs" for additional information](#)). This is only editable on Not Started campaigns.



Ignore Time Zone Restrictions ☐

Max Concurrent Calls\*  (Limit: 10)

Default Retry Count\*

Default Retry Delay (secs)\*

Add Disposition Retry

Disposition Retries  Retry Count  Retry Delay (secs)

Add Milestone Retry

Milestone  Retry Count  Retry Delay (secs)

Add Milestone Quota

Milestone  Quota Amount

Disposition Quota

Quota Amount\*

Daily Quota Disposition

Allow Duplicate Phone Numbers ☐

[Hide advanced settings...](#)

## Advanced Settings

*Note: All of the Advanced Setting fields are editable on Not Started and Started campaigns.*

**Ignore Timezone Restrictions:** If checked, any timezone restrictions setup are ignored.

**Max Concurrent Calls\*:** The maximum number of calls to send to the IVR at once. Note that each account has a channel limit. You may set the max concurrent calls for any individual campaign to any value between 0 (no calls will be sent) to your account channel limit. If you are running multiple campaigns and the total concurrent calls across all campaigns exceeds the limit for your account, the Blast call generator will still limit the total number of active calls across all active campaigns to your account limit.

*If you would like to increase your account channel limit, please contact [Nimblevox Sales](#).*

**Default Retry Count\*:** The number of retries made for each phone number where the disposition returned was System Error or Other. If set to 0, no retries are automatically performed.

**Default Retry Delay (secs)\*:** The number of seconds to wait before performing a retry. The default is 3600 seconds.

**Direct Msg Ring Time (secs):** The number of seconds to wait before disconnecting the call if it has not yet been deflected to the mobile phone's voicemail. This is used in an attempt to keep the called party's phone from ringing.

*Note: This only applies to Direct Message campaigns.*

**Add Disposition Retry:** Click the + button to add a retry based on a specific disposition returned for the call. Multiple disposition retries can be configured per campaign; one per disposition.

**Disposition Retries:** Select the disposition to retry. Available options are: Busy, No Answer, Other, System Error, SIT or Fax.

**Retry Count:** The number of times to perform the retry.

**Retry Delay (secs):** The number of seconds to wait before performing a retry. The default is 3600 seconds.

**Add Milestone Retry:** Click the + button to add a retry based on a specific milestone reached during the call. Multiple milestone retries can be configured per campaign; one per milestone.

*Note: The call must end and the CDR written with the specified milestone for the call to be retried.*

**Milestone:** Enter the milestone to retry. The wording must be exactly the same as configured in the application used for the campaign (see the *Nimblevox Build User's Guide for information on how to add milestones within your custom application*). See [???](#) for the available milestones for Blast and Direct Message campaigns.

**Retry Count:** The number of times to perform the retry.

**Retry Delay (secs):** The number of seconds to wait before performing a retry. The default is 3600 seconds.

**Add Milestone Quota:** Click the + button to add a milestone quota. Multiple milestone quotas can be configured for the campaign; one per milestone. Once any one of the configured quotas is met, the campaign is considered complete and no further calls are initiated.

*Note: The call must end and the CDR written with the specified milestone for the call to count towards the quota.*

**Milestone:** Enter the milestone to retry. The wording must be exactly the same as configured in the application used for the campaign (see the *Nimblevox Build User's Guide for information on how to add milestones within your custom application*). See ??? for the available milestones for Blast and Direct Message campaigns.

**Quota Amount:** The number at which the quota is met.

**Disposition Quota:** Select the disposition to use for the campaign quota. Available dispositions are: Answering Machine, Answered, Busy, No Answer, Other, System Error, SIT and Fax. When the disposition quota is met, the campaign is considered complete and no further calls are initiated. There can be only one disposition quota per campaign.

*Note: The call must end and the CDR written with the specified disposition for the call to count towards the quota.*

**Quota Amount\*:** The number at which the quota is met.

**Daily Quota Disposition:** Select the disposition to use for the daily quota. Available dispositions are: Answering Machine, Answered, Busy, No Answer, Other, System Error, SIT and Fax. When the daily disposition quota is met, the campaign is considered complete for the day and no further calls are initiated. The following day (if the end date has not been reached), the quota is reset and the campaign is resumed. There can be only one daily quota per campaign.

*Note: The call must end and the CDR written with the specified disposition for the call to count towards the quota.*

**Daily Quota Amount\*:** The number at which the quota is met.

**Allow Duplicate Phone Numbers:** If checked, all records from the import file with duplicate phone numbers are imported. An exception is written for each duplicate for informational purposes. If not checked (default), all records with duplicate phone numbers (except for the first record) are removed and an exception is written.

- Click the Update button to save the changes, else click the Cancel button.

Edit Campaign

---

Name*	<input type="text" value="Blast Campaign"/>
Start Date*	<input type="text" value="10/29/2012"/>
Start Time*	<input type="text" value="13:00"/>
Active Days of the Week	<input checked="" type="checkbox"/> S <input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> W <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> F <input checked="" type="checkbox"/> S
End Date*	<input type="text" value="10/31/2012"/>
End Time*	<input type="text" value="19:00"/>
Email Results	<input checked="" type="checkbox"/>
Caller ID*	<input type="text" value="4024768786"/>
Answered Prompt	<input type="button" value="Choose Prompt"/> answered.wav
Answering Machine Prompt*	<input type="button" value="Choose Prompt"/> machineAudio.wav
Disable Opt Out	<input type="checkbox"/>
Opt Out Prompt	<input type="button" value="Choose Prompt"/> opt_out.wav
Append Numbers	<input type="checkbox"/>
Upload Phone List*	<input type="button" value="Choose File"/> No file chosen
<a href="#">Show advanced settings...</a>	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

- You are returned to the Show Campaign screen. A message indicating the campaign was updated is displayed.



*Note: If a new phone list was uploaded, the message 'Currently uploading phone numbers' remains displayed and not all of the campaign detail can be seen until the upload is complete.*

Campaign Blast Campaign updated.

Show Campaign

 Resume

Name	Blast Campaign
Start Date	10/29/2012
End Date	10/31/2012
Start Time	1:00 PM
End Time	7:00 PM
Active Days of the Week	<input checked="" type="checkbox"/> S <input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> W <input checked="" type="checkbox"/> T <input checked="" type="checkbox"/> F <input checked="" type="checkbox"/> S
Email Results	<input checked="" type="checkbox"/>
Campaign Type	Blast
Caller ID	4024768786
Answered Prompt	answered.wav
Answering Machine Prompt	machine.wav
Disable Opt Out	<input checked="" type="checkbox"/>
<a href="#">Show advanced settings...</a>	

### 3.4.3 Refresh

The Refresh button is displayed for all active campaigns (*Not Started and Started*). This is used to refresh the information displayed within the Final Call Disposition and Active Campaign Stats sections.

1. From the Show Campaign screen, click the Refresh button.

## Active Campaign Stats

Status	Started
Campaign Quota Met	False
Daily Quota Met	False
Milestone Quota Met	False
Processed	0
Answering Machine	0
Answered	0
Busy	0
No Answer	0
Other	0
System Error	0
SIT	0
Fax	0

## Last Import Summary

Processed	2	<a href="#">Export Summary to CSV</a>
Imported	1	
Duplicates Removed	0	
Do Not Call Removed	1	
Defaulted Time Zone entries	0	
Errors	0	

## Phone Number Summary

Current	1	<a href="#">Export Constituent Status to CSV</a>
Removed Phone Numbers	0	
Duplicates	0	

[Edit](#)
[Refresh](#)
[Remove Phone Number](#)
[View Import Exceptions](#)
[Reset by Final Call Disposition](#)

- The data within the Final Call Disposition and Active Campaign Stats sections is updated.

## Active Campaign Stats

Status	Started
Campaign Quota Met	False
Daily Quota Met	False
Milestone Quota Met	False
Processed	0
Answering Machine	0
Answered	0
Busy	0
No Answer	0
Other	0
System Error	0
SIT	0
Fax	0

## Last Import Summary

Processed	2	<a href="#">Export Summary to CSV</a>
Imported	1	
Duplicates Removed	0	
Do Not Call Removed	1	
Defaulted Time Zone entries	0	
Errors	0	

## Phone Number Summary

Current	1	<a href="#">Export Constituent Status to CSV</a>
Removed Phone Numbers	0	
Duplicates	0	

[Edit](#)
[Refresh](#)
[Remove Phone Number](#)
[View Import Exceptions](#)
[Reset by Final Call Disposition](#)

### 3.4.4 Remove Phone Number

The Remove Phone Number button is displayed for active campaigns (*Not Started/Started*) and is used to remove individual phone numbers from a campaign.

*Note: If there are duplicate numbers assigned to the campaign, these are removed as well.*

1. From the Show Campaign screen, click the Remove Phone Number button.

## Phone Number Summary

Current	4
Removed Phone Numbers	0
Duplicates	0

[Edit](#)
[Refresh](#)
[Remove Phone Number](#)
[View Import Exceptions](#)

2. The Remove Phone Number screen is displayed. Enter the phone number to remove (*including the leading 1*).

## Remove Phone Number from Campaign - Test5

Phone Number	<input type="text" value="14027702222"/>
<a href="#">Remove</a> <a href="#">Cancel</a>	

3. Click Remove to remove the phone number, else click Cancel.

## Remove Phone Number from Campaign - Test5

Phone Number

- You are returned to the Show Screen. A message is displayed indicating the phone number removed. The Removed Phone Numbers field under the Phone Number Summary section is incremented by 1 or more (*depending on if there were duplicates for the phone number entered*).

## Phone Number Summary

Current	3
Removed Phone Numbers	1
Duplicates	0

### 3.4.5 View Import Exceptions

The View Import Exceptions button is only displayed if there were errors or exceptions that occurred when importing the file of phone numbers. This exception log is regenerated each time a new file is imported.

- From the Show Campaign screen, click the View Import Exceptions button.

## Last Import Summary

Processed	2	<a href="#">Export Summary to CSV</a>
Imported	1	
Duplicates Removed	0	
Do Not Call Removed	1	
Defaulted Time Zone entries	0	
Errors	0	

## Phone Number Summary

Current	1	<a href="#">Export Constituent Status to CSV</a>
Removed Phone Numbers	0	
Duplicates	0	

- The View Import Exceptions screen is displayed. A separate record is generated for each error/exception.

## Campaign Import Exceptions

Line Number	Description
2	Do-Not-Call list phone number entry removed: 4027708036, Allen Wright
3	Could not determine area code for number: 14447701111. Using default area code: CST
7	Duplicate phone number entry removed: 5092260833, Jim Doe
8	Expected [1] custom parameters but found [0]

The following are some possible errors/exceptions:

- Could not determine area code for number: <phone number>. Using default area code: CST
- Duplicate phone number entry removed: <phone number>
- Expected [X] custom parameters but found [Y]
- Do-Not-Call list phone number entry removed: <phone number>

- Click Back to return to the Show Campaign screen.

#### Campaign Import Exceptions

Line Number	Description
2	Do-Not-Call list phone number entry removed: 4027708036, Allen Wright
3	Could not determine area code for number: 14447701111. Using default area code: CST
7	Duplicate phone number entry removed: 5092260833, Jim Doe
8	Expected [1] custom parameters but found [0]



### 3.4.6 Reset by Final Call Disposition

The Reset by Final Call Disposition button is only displayed for campaigns that have started. It is not available for future campaigns (*Not Started*) or completed campaigns. This allows you to retry calls based on the call disposition returned.

- From the Show Campaign screen, click the Reset by Final Call Disposition button.

#### Last Import Summary

Processed	2
Imported	1
Duplicates Removed	0
Do Not Call Removed	1
Defaulted Time Zone entries	0
Errors	0

[Export Summary to CSV](#)

#### Phone Number Summary

Current	1
Removed Phone Numbers	0
Duplicates	0

[Export Constituent Status to CSV](#)

[Edit](#)
[Refresh](#)
[Remove Phone Number](#)
[Reset by Final Call Disposition](#)

- The Reset by Final Call Disposition screen is displayed. If no calls have been completed, the checkbox next to each disposition is unavailable. As calls are completed (*CDR has been created*), the checkbox becomes available next to the appropriate disposition and the Count field is incremented. Retries can be performed while the initial calls are being made or once all completed.

#### Submit Reset by Final Call Disposition for Campaign - Basic Campaign

Reset	Final Call Disposition	Count
<input type="checkbox"/>	Answering Machine	0
<input type="checkbox"/>	Answered	0
<input type="checkbox"/>	Busy	0
<input type="checkbox"/>	No Answer	1
<input type="checkbox"/>	Other	1
<input type="checkbox"/>	System Error	0
<input type="checkbox"/>	SIT	1
<input type="checkbox"/>	Fax	1
		Total 4

[Submit](#)
[Cancel](#)

- Click the checkbox next to the call disposition(s) you wish to retry.

*Note: All currently completed calls for the select disposition are retried.*

Submit Reset by Final Call Disposition for Campaign - Basic Campaign

Reset	Final Call Disposition	Count
<input type="checkbox"/>	Answering Machine	0
<input type="checkbox"/>	Answered	0
<input type="checkbox"/>	Busy	0
<input checked="" type="checkbox"/>	No Answer	1
<input checked="" type="checkbox"/>	Other	1
<input type="checkbox"/>	System Error	0
<input type="checkbox"/>	SIT	1
<input type="checkbox"/>	Fax	1
		Total 4

Submit Cancel

- Click the Submit button to retry the calls for the selected disposition(s), else click the Cancel button.

Submit Reset by Final Call Disposition for Campaign - Basic Campaign

Reset	Final Call Disposition	Count
<input type="checkbox"/>	Answering Machine	0
<input type="checkbox"/>	Answered	0
<input type="checkbox"/>	Busy	0
<input checked="" type="checkbox"/>	No Answer	1
<input checked="" type="checkbox"/>	Other	1
<input type="checkbox"/>	System Error	0
<input type="checkbox"/>	SIT	1
<input type="checkbox"/>	Fax	1
		Total 4

Submit Cancel

- You are returned to the Show Screen. A message is displayed indicating the number of records reset to be retried for the campaign.

2 Campaign record(s) for Basic Campaign have been Reset

Show Campaign

On the Campaign List screen the number of records to be retried are moved from the Completed column back to the Pending column.

Campaign List screen prior to resetting by final call disposition.

Campaign List

Name	Start Date	End Date	User	Pending	Active	Completed	
Basic Campaign	10/29/2012	10/31/2012	Customer ABC	0	0	4	Pause

Campaign List screen after resetting by final call disposition.

Campaign List

Name	Start Date	End Date	User	Pending	Active	Completed	
Basic Campaign	10/29/2012	10/31/2012	Customer ABC	2	0	2	Pause

## 3.4.7 Archive/Unarchive Campaign

### Archive Campaign

The Archive button is only displayed for campaigns that have completed; either by status or all calls made (*no more pending calls*). If the campaign is still active and calls have been selected to be retried via Reset by Final Call Disposition, the Archive button is no longer available. When clicked, the campaign is simply moved from the Campaign List screen to the Archived Campaign List screen.

1. From the Show Campaign screen, click the Archive button.

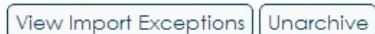


2. The campaign is set to archived. A message is displayed at the top indicating the campaign was successfully archived.

Campaign Basic Campaign was successfully archived

[Show Campaign](#)

An Unarchive button is displayed at the bottom.



3. The campaign is now listed on the Archived Campaign List screen.

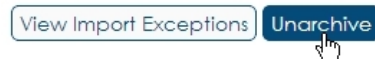
[Archived Campaign List](#)

Name	Start Date	End Date	Start Time	End Time	
<a href="#">Campaign 1</a>	10/1/12	10/3/12	8:00 AM	4:00 PM	<a href="#">Unarchive</a>
<a href="#">Basic Campaign</a>	10/29/12	10/31/12	1:00 PM	8:00 PM	<a href="#">Unarchive</a>
<a href="#">Test Campaign</a>	9/15/12	9/30/12	1:00 PM	9:00 PM	<a href="#">Unarchive</a>

### Unarchive Campaign

The Unarchive button is only displayed for campaigns that have completed and are currently archived. When clicked, the campaign is simply moved from the Archived Campaign List screen to the Campaign List screen.

1. From the Show Campaign screen, click the Unarchive button.

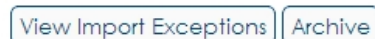


2. The campaign is set back to complete/unarchived. A message is displayed at the top indicating the campaign was successfully unarchived.

Campaign Blast Campaign was successfully unarchived

[Show Campaign](#)

An Archive button is displayed at the bottom.



3. The campaign is moved back to the Campaign List screen.

[Campaign List](#)

Name	Start Date	End Date	User	Pending	Active	Completed
<a href="#">Blast Campaign</a>	10/29/2012	10/31/2012	Customer ABC	1	0	3



## 4 SMS Campaigns

An SMS campaign will send text messages instead of voice calls to all mobile phones in the list











### 4.1 SMS Campaign List

The SMS Campaign List screen displays all non-archived voice campaigns that you have created. The following can be performed from this screen:

- Add a new voice campaign by clicking the Add Voice Campaign button (see [Section 4.2, “Add SMS Campaign”](#) for details)
- View or edit an existing campaign by clicking on the campaign name
- Pause or resume a campaign by clicking the Pause or Resume button

SMS Campaign List
Add SMS Campaign
MDRs

Sms Campaign List

Name	Start Date	End Date	User	Pending	Active	Completed	
<a href="#">New SMS Campaign</a>	2016-08-18	2016-08-18	Admin	0	0	0	
<a href="#">Test Users Blast Campaign 49</a>	2016-08-15	2016-08-20	Test	0	0	0	
<a href="#">Test Users Blast Campaign 48</a>	2016-08-15	2016-08-20	Test	0	0	0	
<a href="#">Test Users Blast Campaign 47</a>	2016-08-15	2016-08-20	Test	0	0	0	
<a href="#">Test Users Blast Campaign 46</a>	2016-08-15	2016-08-20	Test	0	0	0	
<a href="#">Test Users Blast Campaign 45</a>	2016-08-15	2016-08-20	Test	0	0	0	
<a href="#">Test Users Blast Campaign 44</a>	2016-08-15	2016-08-20	Test	0	0	0	
<a href="#">Test Users Blast Campaign 43</a>	2016-08-15	2016-08-20	Test	0	0	0	
<a href="#">Test Users Blast Campaign 42</a>	2016-08-15	2016-08-20	Test	0	0	0	
<a href="#">Test Users Blast Campaign 41</a>	2016-08-15	2016-08-20	Test	0	0	0	

1
2
3
4
5
6
Next

*Note: The campaigns are listed in order of creation by default (newest to oldest), but can be re-organized by Name, Start Date, End Date or Customer. Only 10 campaigns are displayed at a time. To view additional campaigns, click the page number or Next button.*

#### Campaign List Field Definitions

*Note: While a campaign is running, the Pending, Active and Completed counts may not be accurate. Final counts are calculated and displayed once complete.*

**Name:** The name of the campaign.

**Start Date:** The start date of the campaign.

**End Date:** The end date of the campaign.

**User:** The name of the user associated with the campaign.

*Note: This should always be your username, unless you are a Custodian.*

**Pending:** The number of phone numbers loaded for the campaign waiting to be sent the SMS.

**Active:** The number of phone numbers actively being sent the SMS.

**Completed:** The number of phone numbers that have successfully been sent the SMS.

**Pause/Resume/Uploading:** The Pause button is displayed for all active campaigns (*Not Started/Started*) and the Resume button is displayed for currently paused campaigns. When the Pause button is clicked, all active



calls are completed, but no new calls are initiated. When the Resume button is clicked, the calls are again initiated for the campaign. The word 'Uploading' is displayed while the phone numbers are being uploaded for the campaign. These campaigns are a blue.

*Note: Neither the Pause nor Resume button is displayed once the campaign is completed.*

To indicate the campaigns current state, the campaign information is color coded. The following states are possible:

- **Not Started:** The campaign has not yet reached the start date and or start time. These campaigns are a dark gray (e.g. *Example1*).
- **Not Started - Paused:** The campaign had not yet reached the start date and or start time when it was paused by the user. The campaign remains in the paused state (*even once the start date and start time have been reached*) until the user clicks the Resume button. These campaigns are a dark gray (e.g. *Example9 or Example10*).
- **Started:** The campaign has reached the start date and start time and is actively making calls. These campaigns are a dark gray.
- **Started - Paused:** The campaign reached the start date and start time and started to make calls, but was then paused by the user. Any active calls were completed, but no new calls are made. These campaigns are a dark gray (e.g. *Example3*).
- **Completed:** The campaign has passed the end date and end time (*based on HST*) and has been processed as complete. These campaigns are a light gray (e.g. *Example1*).
- **Completed - Paused:** The campaign has passed the end date and end time (*based on HST*) and has been processed as complete while the campaign was paused. These campaigns are a light gray.

## 4.2 Add SMS Campaign

1. To add a new campaign, click the Add SMS Campaign button.
2. The Create Campaign screen is displayed. Enter the required information:

### Create SMS Campaign Field Definitions

*Note: All fields with an asterisk (\*) following the name are required for a campaign.*

**Campaign Name\*:** The name of the SMS campaign.

**Start Paused:** If checked, the campaign is created in the Paused state and will not start until manually resumed.

*Click Next*

[SMS Campaign List](#)
[Add SMS Campaign](#)
[MDRs](#)

---

Create SMS Campaign

Start

SMS

Message \*

Type text message here...

Number

4024768786 ▼

Previous

Next

Scheduler

Contacts

Summary

Name:

New SMS Campaign

Paused:

false

**Message\*:** The message to send in the SMS. Keep in mind that a long message might be split into multiple texts. Not all carriers or phones support reassembling the message into one message.

**Number\*:** The number to send the text from.

*Click Next*

[SMS Campaign List](#)
[Add SMS Campaign](#)
[MDRs](#)

---

Create SMS Campaign

Start

SMS

Scheduler

Start Date \*

yyyy-MM-dd

End Date \*

yyyy-MM-dd

Start Time \*

hh:mm

End Time \*

hh:mm

Previous

Next

Contacts

Summary

Name:

New SMS Campaign

Paused:

false

Message:

Thank you for signing up! You can expect about one message per week with exciting new offers. Reply STOP to opt out.

Number:

4024768786

**Start Date\*:** The date to start the campaign. The date can be entered in the format indicated by the field mask or selected from the calendar.

**End Date\*:** The date to end the campaign. The date can be entered in the format indicated by the field mask or selected from the calendar.

**Start Time\*:** The time (*hh(24):mm*) to start the campaign each day. This can be between 00:00 and 23:59.

**End Time\*:** The time (*hh(24):mm*) to stop the campaign each day. This can be between 00:00 and 23:59.

*Click Next*

[SMS Campaign List](#)
[Add SMS Campaign](#)
[MDRs](#)

---

## Create SMS Campaign

Start  
SMS  
Scheduler  
Contacts

Previous

Submit

**Summary**  
Name: New SMS Campaign  
Paused: false  
Message: Thank you for signing up! You can expect about one message per week with exciting new offers. Reply STOP to opt out.  
Number: 4024768786  
Start Date: 2016-08-18  
End Date: 2016-08-18  
Start Time: 11:00  
End Time: 12:00

**Contact List\*:** The name of the contact list to use for the campaign. This dropdown will also include an option for "-- Upload CSV File --" so you can upload a file for one-time use without generating a contact list.

- Click the Submit button.
- The campaign is created. The Show Campaign screen is displayed with the campaign information.  
*Note: While the phone numbers are being uploaded, the message 'Currently uploading phone numbers' remains displayed and not all of the campaign detail can be seen until the upload is complete.*

[SMS Campaign List](#)
[Add SMS Campaign](#)
[MDRs](#)

---

## Show Campaign

Pause

Show Campaign MDRs

Name	New SMS Campaign
User	Admin
Message	Thank you for signing up! You can expect about one message per week with exciting new offers. Reply STOP to opt out.
Phone Number	4024768786
Start Date	2016-08-18
End Date	2016-08-18
Start Time	11:00
End Time	12:00
Campaign ID	55
Contact List	List 1

- To view all of the campaign detail, press F5 to refresh the screen. See [Section 4.3, "Show SMS Campaign"](#) for details on the fields displayed.

## 4.3 Show SMS Campaign

The Show SMS Campaign screen displays all of the campaign details. From this screen, the following options may be available (*depending on the campaign state*):

- Pause/resume a campaign (see [Section 4.3.1, "Pause/Resume SMS Campaign"](#) for details)
- Edit the campaign (see [Section 4.3.2, "Edit SMS Campaign"](#) for details)
- Refresh the campaign information (see [Section 4.3.3, "Refresh SMS Campaign"](#) for details)
- View import exceptions (see [Section 4.3.4, "View Import Exceptions"](#) for details)

- Click the name of the campaign you wish to view.

## Sms Campaign List

Name	Start Date	End Date	Pending	Active	Completed	
<a href="#">New SMS Campaign</a>	04/15/2016	04/15/2016	1	0	0	<a href="#">Resume</a>
<a href="#">SMS Demo</a>	04/15/2016	04/15/2016	0	0	1	<a href="#">Resume</a>

- The Show Campaign screen is displayed.

At the top of the screen, an MDR button appears in the navigation menu. If you click the MDR button, you will navigate to the Message Detail List pre-loaded with message detail records for the displayed campaign (see [Section 6, "MDRs" for more details](#)).

[SMS Campaign List](#)
[Add SMS Campaign](#)
[MDRs](#)

---

### Show Campaign

[Pause](#)
[Show Campaign MDRs](#)

Name	New SMS Campaign
User	Admin
Message	Thank you for signing up! You can expect about one message per week with exciting new offers. Reply STOP to opt out.
Phone Number	4024768786
Start Date	2016-08-18
End Date	2016-08-18
Start Time	11:00
End Time	12:00
Campaign ID	55
Contact List	List 1

---

#### Final Dispositions

---

#### Active Campaign Stats

Status	Not Started
Processed	0

---

#### Last Import Summary

Processed	0	<a href="#">Export Summary to CSV</a>
Imported	0	
Duplicates Removed	0	
Do Not Call Removed	0	
Defaulted Time Zone entries	0	
Errors	0	

---

#### Phone Number Summary



Current	5	<a href="#">Export Constituent Status to CSV</a>
Removed Phone Numbers	0	
Duplicates	0	

[Edit](#)
[Refresh](#)

## Show/Edit Campaign Field Definitions

Note that many fields can be edited by clicking in the field. The campaign must be paused to edit a field. Click the checkbox that appears to save the change.

[Resume](#)

Name	New SMS Campaign	 
Message	Thank you for registering! You will get about one text per week from us with special <a href="#">Click to Edit</a> OP to opt out.	
Phone Number	12123331212	
Start Date	04/15/2016	
End Date	04/15/2016	
Start Time	11:00	
End Time	16:00	
Campaign ID	19	
Update Constituents	<a href="#">Choose file</a>	No file chosen

**Name:** The name of the SMS campaign.

**Message:** The text that was sent to the mobile number.

**Phone Number:** The number selected as the from number.

**Start Date:** The date the campaign is scheduled to start.

**End Date:** The date the campaign is scheduled to end.

**Start Time:** The time texts will begin to be sent. Note in a multi-day campaign this is the start time each day.

**End Time:** The time texts will stop being sent. Note in a multi-day campaign this is the end time each day.

**Campaign ID:** The ID number for each campaign.

**Update Constituents:** If the campaign has not yet started, you can upload a new list.

### Active Campaign Stats

These are the current active statistics for the campaign. The counts can be updated by clicking the Refresh button, however, they may not be accurate until the campaign is complete.

**Status:** The current status of the campaign. Possible statuses are:

- **Not Started:** The campaign has not yet reached the start date and or start time.
- **Not Started - Paused:** The campaign had not yet reached the start date and or start time when it was paused by the user. The campaign remains in the paused state (*even once the start date and start time have been reached*) until the user clicks the Resume button.
- **Started:** The campaign has reached the start date and start time and is actively sending texts.
- **Started - Paused:** The campaign reached the start date and start time and started to send texts, but was then paused by the user. Any active texts were completed, but no new texts were sent.
- **Completed:** The campaign has passed the end date and end time (*based on HST*) and has been processed as complete.
- **Completed - Paused:** The campaign has passed the end date and end time (*based on HST*) and has been processed as complete while the campaign was paused.

**Processed:** The number of texts processed. This is displayed for campaigns in all states.

**SMS Delivered:** The number of texts that were reported as successfully delivered to the handset.

**SMS Error:** The number of texts that resulted in an error and were not delivered.

**SMS Queued:** The number of texts that were sent but have an unknown result.

**Other:** An unexpected error occurred. It is unknown whether the text was sent or not.

### Last Import Summary

**Processed:** The total number of phone numbers in the import file.

**Imported:** The total number of phone numbers that were actually imported for the campaign.

**Duplicates Removed:** The number of phone numbers that were removed because they were duplicates.

**Do Not Call Removed:** The number of phone numbers that were removed (*not imported*) because they were on the customer's Do Not Call (DNC) list.

**Defaulted Time Zone entries:** The number of phone numbers imported with an unknown time zone (*area code not configured for a time zone*). These configured default time zone (CST) is applied to these numbers.

**Errors:** The number of phone numbers that were removed (*not imported*) due to errors (e.g. *phone number length invalid, unexpected custom parameters, etc*). To see the import errors for the campaign, click the View Import Exceptions button. See [Section 3.4.5, "View Import Exceptions"](#) for additional details.

**Export Summary to CSV:** Click this link to export a summary of the last phone list imported for the campaign to a CSV file. This contains the same information as displayed in this section.

### Phone Number Summary

**Current:** The number of current phone numbers assigned to the campaign.

**Removed Phone Numbers:** The number of phone numbers that have been removed from the campaign. See [Section 3.4.4, "Remove Phone Number"](#) for details.

**Duplicates:** The number of duplicate phone numbers assigned to the campaign.

**Export Constituent Status to CSV:** Click this link to export the list of this campaign's phone numbers along with their current status. Their custom data will be included as well.

### 4.3.1 Pause/Resume SMS Campaign

All active campaigns (*Started/Not Started states*) can be paused/resumed.

#### Pause Campaign

The Pause button is displayed for all active campaigns. When clicked, all active calls are completed, but no new calls are initiated.

1. From the Show Campaign screen, click the Pause button.

[Show Campaign](#)



2. The campaign is paused. A message is displayed at the top indicating the campaign was successfully paused. The Resume button is now displayed.

Successfully paused campaign Basic Campaign

[Show Campaign](#)



#### Resume Campaign

The Resume button is displayed for all paused campaigns. When clicked, calls are again initiated for the campaign.

1. From the Show Campaign screen, click the Resume button.

Show Campaign



- The campaign is resumed. A message is displayed at the top indicating the campaign was successfully resumed. The Pause button is now displayed.

Successfully resumed campaign Basic Campaign

Show Campaign



## 4.3.2 Edit SMS Campaign

All active (*Started/Not Started*) campaigns can be edited, however, the editable fields are dependent on the campaign status.

- From the Show Campaign screen, click the Edit button.



- The Edit Campaign screen is displayed. Make the required updates.

Edit Campaign

Name*	<input type="text" value="New SMS Campaign"/>
Message*	<input type="text" value="Thank you for signing up! You can expect about one message per week with exciting new offers. Reply STOP to opt out."/>
Phone Number*	<input type="text" value="4024768786"/>
Start Date*	<input type="text" value="2016-08-18"/>
End Date*	<input type="text" value="2016-08-18"/>
Start Time*	<input type="text" value="11:00"/>
End Time*	<input type="text" value="12:00"/>
Contact List*	<input type="text" value="List 1"/>

### Edit Campaign Field Definitions

*Note: All fields with an asterisk (\*) following the name are required for a campaign.*

**Name\*:** The name of the campaign. This can be up to 100 characters. This is editable on Not Started and Started campaigns.

**Message\*:** The SMS message you want to send.

**Phone Number\*:** The phone number assigned to your account that will be used to send the SMS message.

**Start Date\*:** The date to start the campaign. The date can be entered in the format indicated by the field mask or selected from the calendar.

**End Date\*:** The date to end the campaign. The date can be entered in the format indicated by the field mask or selected from the calendar. This is editable on Not Started and Started campaigns.

**Start Time\*:** The time (*hh(24):mm*) to start the campaign each day. This can be between 00:00 and 23:59. This is editable on Not Started and Started campaigns.



**End Time\*:** The time (*hh(24):mm*) to stop the campaign each day. This can be between 00:00 and 23:59. This is editable on Not Started and Started campaigns.

**Contact List\*:** The list used by this campaign, if applicable.

3. Click the Update button to save the changes, else click the Cancel button.
4. You are returned to the Show Campaign screen. A message indicating the campaign was updated is displayed.

*Note: If a new phone list was uploaded, the message 'Currently uploading phone numbers' remains displayed and not all of the campaign detail can be seen until the upload is complete.*

## 4.3.3 Refresh SMS Campaign

The Refresh button is displayed for all active campaigns (*Not Started and Started*). This is used to refresh the information displayed within the Final Call Disposition and Active Campaign Stats sections.

1. From the Show Campaign screen, click the Refresh button.

### Final Dispositions

Final Dispositions	Count	Percentage
SMS Delivered	1	100
SMS Error	0	0
SMS Queued	0	0
Total	1	

### Active Campaign Stats

Status	Started
Processed	1
SMS Delivered	1
SMS Error	0
SMS Queued	0

### Last Import Summary

Processed	1	<a href="#">Export Summary to CSV</a>
Imported	1	
Duplicates Removed	0	
Do Not Call Removed	0	
Defaulted Time Zone entries	0	
Errors	0	

### Phone Number Summary

Current	1	<a href="#">Export Constituent Status to CSV</a>
Removed Phone Numbers	0	
Duplicates	0	

[Edit](#) [Refresh](#)

2. The data within the Final Call Disposition and Active Campaign Stats sections is updated.

## Final Dispositions

Final Dispositions	Count	Percentage
SMS Delivered	1	100
SMS Error	0	0
SMS Queued	0	0
Total	1	

## Active Campaign Stats

Status	Started
Processed	1
SMS Delivered	1
SMS Error	0
SMS Queued	0

## Last Import Summary

Processed	1	<a href="#">Export Summary to CSV</a>
Imported	1	
Duplicates Removed	0	
Do Not Call Removed	0	
Defaulted Time Zone entries	0	
Errors	0	

## Phone Number Summary

Current	1	<a href="#">Export Constituent Status to CSV</a>
Removed Phone Numbers	0	
Duplicates	0	

[Edit](#) [Refresh](#)

#### 4.3.4 View Import Exceptions

The View Import Exceptions button is only displayed if there were errors or exceptions that occurred when importing the file of phone numbers. This exception log is regenerated each time a new file is imported.

1. From the Show Campaign screen, click the View Import Exceptions button.

## Last Import Summary

Processed	1,000	<a href="#">Export Summary to CSV</a>
Imported	474	
Duplicates Removed	0	
Do Not Call Removed	0	
Defaulted Time Zone entries	0	
Errors	526	

## Phone Number Summary

Current	474	<a href="#">Export Constituent Status to CSV</a>
Removed Phone Numbers	0	
Duplicates	0	

[Edit](#) [Refresh](#) [View Import Exceptions](#)

2. The View Import Exceptions screen is displayed. A separate record is generated for each error/exception.

### Campaign Import Exceptions

---

Line Number	Description
2	Do-Not-Call list phone number entry removed: 4027708036,Allen Wright
3	Could not determine area code for number: 14447701111. Using default area code: CST
7	Duplicate phone number entry removed: 5092260833,Jim Doe
8	Expected [1] custom parameters but found [0]

[Back](#)

The following are some possible errors/exceptions:

- Could not determine area code for number: <phone number>. Using default area code: CST
- Duplicate phone number entry removed: <phone number>
- Expected [X] custom parameters but found [Y]
- Do-Not-Call list phone number entry removed: <phone number>

3. Click Back to return to the Show Campaign screen.

### Campaign Import Exceptions

---

Line Number	Description
2	Do-Not-Call list phone number entry removed: 4027708036,Allen Wright
3	Could not determine area code for number: 14447701111. Using default area code: CST
7	Duplicate phone number entry removed: 5092260833,Jim Doe
8	Expected [1] custom parameters but found [0]

[Back](#)



## 5 CDRs

A Call Detail Record (CDR) is created for each call made. The CDR stores the detailed information regarding each call.

### 5.1 Call Detail List

The Call Detail List screen allows you to search for CDRs, view the basic CDR information and export the CDRs to a CSV file. Upon entering the screen, no CDRs are displayed.

#### Call Detail List Field Definitions

**Start Date:** The start date for the search. The date can be entered in the format indicated by the field mask or selected from the calendar. This defaults to the first of the month.

**End Date:** The end date for the search. The date can be entered in the format indicated by the field mask or selected from the calendar. This defaults to the current date.

**Campaign:** The campaign to which the CDRs are associated. Select '-All-' to search all campaigns, select a specific campaign or select multiple campaigns by holding the 'Ctrl' key while selecting the campaigns. Note that archived campaigns will not be included in the list.

**Phone Number:** The phone number called. This can be a specific phone number or part of one by using a wildcard (\* or %). A wildcard can be used at the beginning, end or middle of the phone number. For example, '1402%' returns all CDRs with a phone number starting with '1402'. Whereas, '\*402\*' returns all CDRs with a phone number that includes '402' anywhere in the number (e.g.. '14025552222' and '13085402651').

**Time Zone:** The time zone of the phone number called. Select '-All-' to search all time zones, select a specific time zone or select multiple time zones by holding the 'Ctrl' key while selecting the time zones.

**Milestone:** The milestone phrase recorded in the CDR. This can be a specific milestone or part of one by using a wildcard (\* or %). A wildcard can be used at the beginning, end or middle of the milestone. For example, 'Started human\*' returns all CDRs with a milestone phrase that starts with 'Started human'. Whereas, '%human%' returns all CDRs with a milestone phrase that includes 'human' anywhere in the number (e.g. 'Started human audio' and 'Completed human audio').

**Call Disposition:** The call disposition returned for the call. Select '-All-' to search all dispositions, select a specific disposition or select multiple dispositions by holding the 'Ctrl' key while selecting the dispositions.

### 5.1.1 CDR Search

A search can be performed using one or all of the available criteria.

1. Enter the desired search criteria.

Call Detail List

---

Start Date	<input type="text" value="10/01/2012"/>	End Date	<input type="text" value="10/30/2012"/>
Campaign	<div> <div>ABC-Survey</div> <div>ABC-Survey2</div> <div>ABC-Survey3</div> <div>Basic Campaign</div> </div>	Phone Number	<input type="text" value="*402%"/>
Time Zone	<div> <div>-All-</div> <div>ATLANTIC STANDARD TIME</div> <div>EASTERN STANDARD TIME</div> <div>CENTRAL STANDARD TIME</div> </div>	Milestone	<input type="text"/>
Call Disposition	<div> <div>-All-</div> <div>Answering Machine</div> <div>Answered</div> <div>Busy</div> </div>		

2. Click the Search button, else click the Reset button.

Call Detail List

---

Start Date	<input type="text" value="10/01/2012"/>	End Date	<input type="text" value="10/30/2012"/>
Campaign	<div> <div>ABC-Survey</div> <div>ABC-Survey2</div> <div>ABC-Survey3</div> <div>Basic Campaign</div> </div>	Phone Number	<input type="text" value="*402%"/>
Time Zone	<div> <div>-All-</div> <div>ATLANTIC STANDARD TIME</div> <div>EASTERN STANDARD TIME</div> <div>CENTRAL STANDARD TIME</div> </div>	Milestone	<input type="text"/>
Call Disposition	<div> <div>-All-</div> <div>Answering Machine</div> <div>Answered</div> <div>Busy</div> </div>		

3. The matching CDRs are returned.

Total Call Time **00:00:21.865** [Export to CSV](#)  
 Fax: **4** No Answer: **6**

Start Time	Campaign	Phone Number	Call Disposition	Duration
<a href="#">10/30/12 3:42 PM</a>	Basic Campaign	14024767473	Fax	00:00:04.871
<a href="#">10/30/12 1:31 PM</a>	Basic Campaign	14027702222	No Answer	00:00:00.000
<a href="#">10/30/12 1:00 PM</a>	Basic Campaign	14027702222	No Answer	00:00:00.000
<a href="#">10/30/12 9:16 AM</a>	ABC-Survey	14027702222	No Answer	00:00:00.000
<a href="#">10/30/12 9:16 AM</a>	ABC-Survey	14024767473	Fax	00:00:04.882
<a href="#">10/29/12 5:40 PM</a>	Basic Campaign	14027702222	No Answer	00:00:00.000
<a href="#">10/29/12 4:39 PM</a>	Basic Campaign	14024767473	Fax	00:00:07.288
<a href="#">10/29/12 4:39 PM</a>	Basic Campaign	14027702222	No Answer	00:00:00.000
<a href="#">10/29/12 3:13 PM</a>	ABC-Survey2	14024767473	Fax	00:00:04.824
<a href="#">10/29/12 3:13 PM</a>	ABC-Survey2	14027702222	No Answer	00:00:00.000

*Note: CDRs are listed in order of creation by default (newest to oldest), but can be re-organized by clicking any of the column headings. Only 10 CDRs are displayed at a time. To view additional CDRs, click the page number or Next button.*

#### CDR Results Field Definitions

**Total Call Time:** The total duration (*hh:mm:ss.ms*) for all CDRs currently displayed on the screen.

**Disposition Total:** A total is displayed for each call disposition assigned to the 10 displayed CDRs.

**Start Time:** The date and time the CDR was created.

**Campaign:** The name of the campaign associated with the CDR.

**Phone Number:** The phone number called.

**Call Disposition:** The disposition returned for the call.

**Duration:** The length of the call (*hh:mm:ss.ms*).

## 5.1.2 View CDR Detail

All call information is stored on the CDR. To view the CDR detail:

1. Click the Start Time of the CDR to view.

Total Call Time **00:00:21.865** [Export to CSV](#)  
 Fax: **4** No Answer: **6**

Start Time	Campaign	Phone Number	Call Disposition	Duration
<a href="#">10/30/12 3:42 PM</a>	Basic Campaign	14024767473	Fax	00:00:04.871
<a href="#">10/30/12 1:31 PM</a>	Basic Campaign	14027702222	No Answer	00:00:00.000
<a href="#">10/30/12 1:00 PM</a>	Basic Campaign	14027702222	No Answer	00:00:00.000
<a href="#">10/30/12 9:16 AM</a>	ABC-Survey	14027702222	No Answer	00:00:00.000
<a href="#">10/30/12 9:16 AM</a>	ABC-Survey	14024767473	Fax	00:00:04.882
<a href="#">10/29/12 5:40 PM</a>	Basic Campaign	14027702222	No Answer	00:00:00.000
<a href="#">10/29/12 4:39 PM</a>	Basic Campaign	14024767473	Fax	00:00:07.288
<a href="#">10/29/12 4:39 PM</a>	Basic Campaign	14027702222	No Answer	00:00:00.000
<a href="#">10/29/12 3:13 PM</a>	ABC-Survey2	14024767473	Fax	00:00:04.824
<a href="#">10/29/12 3:13 PM</a>	ABC-Survey2	14027702222	No Answer	00:00:00.000

1 2 [Next](#)

2. The Show Call Detail screen is displayed.

[CDR List](#)

Show Call Detail

Call Date Time	10/30/12 3:42 PM
Call Disposition	Fax
Campaign	<a href="#">Basic Campaign</a>
Phone	14024767473
Ivr Hostname	blaststone.interact.nonreg
SIP Code	9991
SIP Description	Fax Detected
Milestone	Empty
Attempt	1
Duration	00:00:04.871
Name	John Smith

### Show Call Detail Field Definitions

*Note: The following fields are displayed for all CDRs.*

**Call Date Time:** The date and time the call started.

*Note: This is the system time of the host, which may not be the time the called party actually received the call if they are in a different time zone.*

**Call Disposition:** The disposition returned for the call.

**Campaign:** The name of the campaign associated with the CDR. To view the campaign detail (*Show Campaign* screen), click on the name.

**Phone:** The phone number called.

**IVR Hostname:** The name of the IVR that performed the call.

**SIP Code:** The SIP code returned for the call. The following are NewNet specific codes:

- 9990 - S.I.T Detected
- 9991 - Fax Detected
- 9992 - Answering Machine Detected
- 9993 - Connected
- 9994 - No Answer
- 999000 - System Error
- 999001 - System Error
- 999002 - System Error
- 999003 - Other

**SIP Description:** The description of the SIP code returned for the call.

**Milestone:** The final milestone phrase for the call. This may be blank depending on the call disposition or if milestones are configured for your application.

*Note: The Blast and Direct Message applications have default milestones configured.*

**Attempt:** The number of attempts made to this phone number. This is incremented each time a retry is performed (*if retries are configured for the campaign*).

*Note: This is reset for retries which are performed via the Reset by Final Call Disposition screen.*

**Duration:** The length of the call (hh:mm:ss.ms).

### Imported Custom Parameters

Any field following the Duration is a custom parameter included within the import file.

**Name:** This is being used for the name associated with the phone number.

### Call Application Custom Parameters

Custom parameters can be configured within custom applications to be returned with each call. These are displayed at the bottom.

#### Custom Parameters

Question One	True
Question Two	False
Opt Out	True

- To return to the Call Detail List screen, you can either:

- Click the CDR List button.

*Note: This returns you to the Call Detail List screen, however, all search criteria is removed.*



Show Call Detail

Call Date Time	10/29/12 4:19 PM
Call Disposition	Answered
Campaign	<u>XYZ-Survey1</u>
Phone	14027708036
Ivr Hostname	blaststone.interact.nonreg
SIP Code	9993
SIP Description	Connected
Milestone	Started human audio
Attempt	1
Duration	00:00:05.740



- Click the browser's Back button.

*Note: This returns you to the Call Detail List screen while preserving all search criteria.*

### 5.1.3 Export to CSV

The Export to CSV link is used to export all CDRs matching the search criteria to a csv file. The exported file includes a header, separate line for each CDR and a total count for each call disposition.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Call Start Time,Campaign,Phone Number,Call Disposition,SIP Code,SIP Description,Milestone,Attempt,Duration											
2	2013-03-19 14:42:38,Survey 1,19135215823,Answering Machine,9992,Answering Machine Detected,Started audio,1,12.0											
3	2013-03-19 14:42:38,Survey 1,19845621301,Answered,9993,Connected,Completed human audio,1,55.0											
4	2013-03-19 14:42:38,Survey 1,14023206513,Fax,9991,Fax Detected,,1,71.0											
5	2013-03-19 14:42:38,Survey 1,14024612546,SIT,9990,S.I.T. Detected,,1,90.0											
6	2013-03-19 14:42:38,Survey 1,19184521563,No Answer,9994,No Answer,,1,60.0											
7	Total Duration,288.0											
8	Total Answered,1											
9	Total Answering Machine,1											
10	Total Busy,0											
11	Total Fax,1											
12	Total No Answer,1											
13	Total Other,0											
14	Total SIT,1											
15	Total System Error,0											

#### Export Results Field Definitions

**Call Start Time:** The date and time the CDR was created.

**Campaign:** The name of the campaign associated with the CDR.

**Phone Number:** The phone number called.

**Call Disposition:** The disposition returned for the call.

**SIP Code:** The SIP code returned for the call. *See above for NewNet specific codes.*

**SIP Description:** The description of the SIP code returned for the call.

**Milestone:** The final milestone phrase for the call. This may be blank depending on the call disposition or if milestones are configured for your application.

**Attempt:** The number of attempts made to this phone number. This is incremented each time a retry is performed (*if retries are configured for the campaign*).

**Duration:** The length of the call (*hh:mm:ss.ms*).

## 6 MDRs

A Message Detail Record (MDR) is created for each text sent. The MDR stores the detailed information regarding each text.

### 6.1 Message Detail List

The Message Detail List screen allows you to search for MDRs, view the basic MDR information and export the MDRs to a CSV file. Upon entering the screen, no MDRs are displayed.

The screenshot shows the 'Message Detail List' interface. At the top, there's a tab labeled 'MDR List'. Below it, the title 'Message Detail List' is displayed. The search filters include:
 

- Start Date:** 04/20/2016
- End Date:** 04/29/2016
- Campaign:** A dropdown menu with options: -All-, New SMS Campaign, Reminders (selected), and SMS Demo.
- Time Zone:** A dropdown menu with options: -All-, (UTC-3) Canada/Atlantic, (UTC-3) America/Halifax, and (UTC-3) America/St\_Johns.
- Final Disposition:** A dropdown menu with options: SMS Queued, SMS Error, and SMS Delivered.

 Below the filters are 'Search' and 'Reset' buttons. A summary line indicates 'SMS Delivered:3'. To the right of this is an 'Export to CSV' link. Below the summary is a table with the following data:

Call Date Time	Campaign	To Number	Final Disposition
04/20/2016 09:40	Reminders	14022223333	SMS Delivered
04/20/2016 09:40	Reminders	14032223333	SMS Delivered
04/20/2016 09:39	Reminders	13082223333	SMS Delivered

#### Message Detail List Field Definitions

**Start Date:** The start date for the search. The date can be entered in the format indicated by the field mask or selected from the calendar.

**End Date:** The end date for the search. The date can be entered in the format indicated by the field mask or selected from the calendar.

**Campaign:** The campaign to which the MDRs are associated. Select '-All-' to search all campaigns, select a specific campaign or select multiple campaigns by holding the 'Ctrl' key while selecting the campaigns. Note that archived campaigns will not be included in the list.

**To Number:** The destination of the text. This can be a specific phone number or part of one by using a wildcard (\* or %). A wildcard can be used at the beginning, end or middle of the phone number. For example, '1402%' returns all MDRs with a phone number starting with '1402'. Whereas, '\*402\*' returns all MDRs with a phone number that includes '402' anywhere in the number (e.g., '14025552222' and '13085402651').

**Time Zone:** The time zone of the phone number. Select '-All-' to search all time zones, select a specific time zone or select multiple time zones by holding the 'Ctrl' key while selecting the time zones.

**Final Disposition:** The final disposition returned for the text. Select '-All-' to search all dispositions, select a specific disposition or select multiple dispositions by holding the 'Ctrl' key while selecting the dispositions.

#### 6.1.1 MDR Search

A search can be performed using one or all of the available criteria.

1. Enter the desired search criteria.

#### Call Detail List

Start Date	<input type="text" value="10/01/2012"/>	End Date	<input type="text" value="10/30/2012"/>
Campaign	<div> <div>ABC-Survey</div> <div>ABC-Survey2</div> <div>ABC-Survey3</div> <div>Basic Campaign</div> </div>	Phone Number	<input type="text" value="*402%"/>
Time Zone	<div> <div>-All-</div> <div>ATLANTIC STANDARD TIME</div> <div>EASTERN STANDARD TIME</div> <div>CENTRAL STANDARD TIME</div> </div>	Milestone	<input type="text"/>
Call Disposition	<div> <div>-All-</div> <div>Answering Machine</div> <div>Answered</div> <div>Busy</div> </div>		

2. Click the Search button, else click the Reset button.

#### Message Detail List

Start Date	<input type="text" value="04/01/2016"/>	End Date	<input type="text" value="04/29/2016"/>
Campaign	<div> <div>-All-</div> <div>New SMS Campaign</div> <div>Reminders</div> <div>SMS Demo</div> </div>	To Number	<input type="text" value="*402%"/>
Time Zone	<div> <div>-All-</div> <div>(UTC-3) Canada/Atlantic</div> <div>(UTC-3) America/Halifax</div> <div>(UTC-3) America/St_Johns</div> </div>		
Final Disposition	<div> <div>SMS Queued</div> <div>SMS Error</div> <div>SMS Delivered</div> </div>		

3. The matching CDRs are returned.

SMS Delivered:2 [Export to CSV](#)

Call Date Time	Campaign	To Number	Final Disposition
04/20/2016 09:40	Reminders	14022223333	SMS Delivered
04/15/2016 13:39	SMS Demo	14024291622	SMS Delivered

*Note: MDRs are listed in order of creation by default (newest to oldest), but can be re-organized by clicking any of the column headings. Only 10 MDRs are displayed at a time. To view additional MDRs, click the page number or Next button.*

#### MDR Results Field Definitions

**Disposition Total:** Above the listing, each disposition is listed with the total for that disposition.

**Message Date Time:** The date and time the MDR was created.

**Campaign:** The name of the campaign associated with the MDR.

**To Number:** The destination number for the text.

**Final Disposition:** The disposition returned for the text.

### 6.1.2 View MDR Detail

All call information is stored on the MDR. To view the MDR detail:

1. Click the Message Date Time of the MDR to view.
2. The Show Message Detail screen is displayed.

MDR List	
Show SMS Detail	
SMS Sent Time	04/20/2016 09:40
SMS Disposition	SMS Delivered
Campaign	<u>Reminders</u>
To Number	14022223333
From Number	12125551212
Message	You have an appointment with Doc Smith at 1:00 PM. See you then!
SMS Delivery Time	04/20/2016 09:40
Delivery Code	2501
Code Description	SMS was delivered to handset
Cat	myCat
Dog	myDog
time	1:00 PM

### Show Message Detail Field Definitions

*Note: The following fields are displayed for all MDRs.*

**SMS Sent Time:** The date and time the message was sent.

*Note: This is the system time of the host, which may not be the time the called party actually received the text if they are in a different time zone.*

**SMS Disposition:** The disposition returned for the text.

**Campaign:** The name of the campaign associated with the MDR. To view the campaign detail (*Show SMS Campaign screen*), click on the name.

**To Number:** The destination number for the text.

**From Number:** The number the text was sent from.

**Message:** The message that was delivered.

**SMS Delivery Time:** This is the time we received the updated Delivery Code with the status of the text.

**Delivery Code:** The numeric code associated with the delivery status.

**Code Description:** The description associated with the Delivery Code.

### Imported Custom Parameters

Any field following the Code Description is a custom parameter included within the import file or contact.

- To return to the Call Detail List screen, you can either:

- Click the MDR List button.

*Note: This returns you to the Message Detail List screen, however, all search criteria is removed.*

- Click the browser's Back button.

*Note: This returns you to the Call Detail List screen while preserving all search criteria.*

## 6.1.3 Export to CSV

The Export to CSV link is used to export all MDRs matching the search criteria to a csv file. The exported file includes a header, separate line for each MDR and a total count for each call disposition.

	A	B	C	D	E	F	G	H	
1	SMS Sent Time	SMSDisposition	Campaign	To Number	From Number	Message	SMS Delivery Time	Delivery Code	Code Description
2	4/20/2016 9:39	SMS Delivered	Reminders	13082223333	12125551212	You have an appointment with Doc Smith at 2:00 PM. See you then!	4/20/2016 9:39	2501	SMS was
3	4/20/2016 9:40	SMS Delivered	Reminders	14032223333	12125551212	You have an appointment with Doc Smith at 9:00 AM. See you then!	4/20/2016 9:40	2501	SMS was
4	4/20/2016 9:40	SMS Delivered	Reminders	14022223333	12125551212	You have an appointment with Doc Smith at 1:00 PM. See you then!	4/20/2016 9:40	2501	SMS was
5	Total SMS Queue	0							
5	Total SMS Error	0							
7	Total SMS Delivered	4							
3									

### Export Results Field Definitions

**SMS Sent Time:** The date and time the message was sent.

*Note: This is the system time of the host, which may not be the time the called party actually received the text if they are in a different time zone.*

**SMS Disposition:** The disposition returned for the text.

**Campaign:** The name of the campaign associated with the MDR. To view the campaign detail (*Show SMS Campaign screen*), click on the name.

**To Number:** The destination number for the text.

**From Number:** The number the text was sent from.

**Message:** The message that was delivered.

**SMS Delivery Time:** This is the time we received the updated Delivery Code with the status of the text.

**Delivery Code:** The numeric code associated with the delivery status.

**Code Description:** The description associated with the Delivery Code.

### Imported Custom Parameters

Any column following the Code Description is a custom parameter included within the import file or contact.

## 7 Inbound SMS

If subscriber's send texts back to your account, you can manage and view the inbound texts from the Inbound SMS tab.

### 7.1 Keywords

From the Numbers screen you can add and configure keywords for each of your Numbers.



The screenshot shows a web interface with two tabs at the top: 'Numbers' (selected) and 'Inbound MDRs'. Below the tabs, the heading 'Inbound SMS' is displayed. A list of phone numbers is shown, with the first one being '12125551212'. Below the number, there is a button labeled 'Add Keyword'.

*Note: The phone numbers are listed in ascending order by default, but can be re-organized by Phone Number or Add Date. Only 100 phone numbers are displayed at a time. To view additional phone numbers, click the page number or Next button.*

#### Do Not Call List Field Definitions

**Phone Number:** The phone number of the called party who no longer wishes to be called with future campaigns.

**Add Date:** The date the phone number was added to the list. This is the date the number was either manually added or when the called party opted out.

#### 7.1.1 Add Keyword

Keywords can be assigned to each Number you own.

1. To add a keyword to a number, click the Add Keyword button below the number.
2. The Add Keyword screen is displayed.

Add Keyword to 12125551212

Keyword *	<input type="text" value="STOP"/>
Start Date	<input type="text" value="MM/dd/yyyy"/>
End Date	<input type="text" value="MM/dd/yyyy"/>
Enable Auto Reply	<input checked="" type="checkbox"/>
Auto Reply Text	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">We are sorry to see you go. You will be removed from our SMS list within 48 hours. Call 18005555555 for help.</div>
Enable Forwarding URL	<input checked="" type="checkbox"/>
Forwarding URL	<input type="text" value="http://myserver.mydom"/>

#### Add Keyword Field Definitions

*Note: It can take up to 60 seconds for keyword changes to take effect.*

**Keyword:** If the inbound text contains this keyword it will use this configuration. Keyword matching is not case sensitive.

**Start Date:** To defer the keyword handling to a future start date, enter the date here. Otherwise, leave this blank and the keyword handling will begin immediately.

**End Date:** To set a date when this keyword will no longer be handled, enter the date here. Otherwise, leave this blank and the keyword will be handled indefinitely.

**Enable Auto Reply:** Check this box to have a text sent back to the user when the system receives a text with this keyword. When this is checked, the Auto Reply Text is required.

**Auto Reply Text:** The text that will be sent to the originator of the inbound text when the inbound text contains this keyword.

**Enable Forwarding URL:** If you want to program some special handling for texts containing this keyword, the text can be posted to a web service you are hosting.

**Forwarding URL:** The URL to which the inbound text information should be forwarded. Included in the post will be the parameters:

- keyword: the keyword that was matched for this inbound text.
- source: The mobile phone number that sent the inbound text.
- destination: The number the inbound text was sent to.
- message: The actual content of the inbound text.
- messageId: A unique ID that is assigned to this text.
- trackingId: A unique ID used to track the text status.

Note: you must respond with "OK" in the message body.



### 7.1.2 View Keyword


If you have a keyword configured you will see it on the Numbers screen under the number to which it is assigned.

Inbound SMS


12125551212	
STOP	
<a href="#">Add Keyword</a>	

If you click on the keyword, it will expand so you can view the details for that keyword.

Inbound SMS

12125551212	
STOP	
Start Date	
End Date	
Auto Reply Enabled	true
Auto Reply Text	We are sorry to see you go. You will be removed from our SMS list within 48 hours. Call 18005555555 for help.
Forwarding Url Enabled	true
Forwarding Url	http://myserver.mydomain.com/handleStop/
<a href="#">Add Keyword</a>	

### 7.1.3 Edit Keyword

1. To Edit a Keyword, click the edit icon  to the right of the keyword. The Edit Keyword screen will appear.

### Edit Keyword Field Definitions

*Note: It can take up to 60 seconds for keyword changes to take effect.*

**Keyword:** If the inbound text contains this keyword it will use this configuration. Keyword matching is not case sensitive.

**Start Date:** To defer the keyword handling to a future start date, enter the date here. Otherwise, leave this blank and the keyword handling will begin immediately.

**End Date:** To set a date when this keyword will no longer be handled, enter the date here. Otherwise, leave this blank and the keyword will be handled indefinitely.

**Enable Auto Reply:** Check this box to have a text sent back to the user when the system receives a text with this keyword. When this is checked, the Auto Reply Text is required.

**Auto Reply Text:** The text that will be sent to the originator of the inbound text when the inbound text contains this keyword.

**Enable Forwarding URL:** If you want to program some special handling for texts containing this keyword, the text can be posted to a web service you are hosting.


**Forwarding URL:** The URL to which the inbound text information should be forwarded. Included in the post will be the parameters:

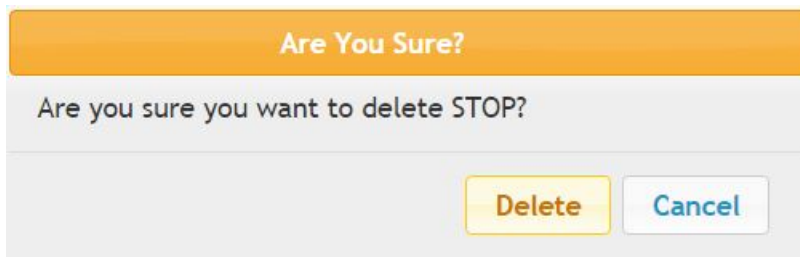
- keyword: the keyword that was matched for this inbound text.
- source: The mobile phone number that sent the inbound text.
- destination: The number the inbound text was sent to.
- message: The actual content of the inbound text.
- messageId: A unique ID that is assigned to this text.
- trackingId: A unique ID used to track the text status.

Note: your URL must respond with "OK" in the message body.

2. After updating the fields as needed, click Update. Click Cancel to leave the keyword unchanged.

### 7.1.4 Delete Keyword.

1. To Delete a Keyword, click the delete icon  to the right of the keyword. The Delete confirmation dialog will appear.



The dialog box has an orange header with the text "Are You Sure?". Below the header, the text "Are you sure you want to delete STOP?" is displayed. At the bottom right, there are two buttons: a yellow "Delete" button and a white "Cancel" button with a blue border.

After updating the fields as needed, click Update. Click Cancel to leave the record unchanged.

2. Click Delete to delete the keyword. Click Cancel to leave the keyword unchanged.

## 7.2 Inbound Message Detail List

The Message Detail List screen for inbound texts allows you to search for MDRs, view the basic MDR information and export the MDRs to a CSV file. Upon entering the screen, no MDRs are displayed.

### Inbound SMS Detail List



The form is titled "Inbound SMS Detail List" and contains several input fields and buttons. On the left, there are three stacked input fields labeled "Start Date", "From Number", and "Keyword". On the right, there are two stacked input fields labeled "End Date" and "To Number". At the bottom left, there are two buttons: "Search" and "Reset".

### Message Detail List Field Definitions

**Start Date:** The start date for the search. The date can be entered in the format indicated by the field mask or selected from the calendar.

**End Date:** The end date for the search. The date can be entered in the format indicated by the field mask or selected from the calendar.

**From Number:** The originating number for the text

**To Number:** The destination of the text.

**Keyword:** The keyword match that was found for this text.

### 7.2.1 MDR Search

A search can be performed using one or all of the available criteria.

1. Enter the desired search criteria.

### Inbound SMS Detail List



This is a duplicate of the form shown in the previous block, titled "Inbound SMS Detail List". It contains input fields for "Start Date", "End Date", "From Number", "To Number", and "Keyword", along with "Search" and "Reset" buttons.

### Message Detail List Search Field Definitions

**Start Date:** The start date for the search. The date can be entered in the format indicated by the field mask or selected from the calendar.

**End Date:** The end date for the search. The date can be entered in the format indicated by the field mask or selected from the calendar.

**From Number:** The originating number for the text

**To Number:** The destination of the text.

**Keyword:** The keyword match that was found for this text.

- Click the Search button, or click Reset to clear the search fields.
- The matching CDRs are returned.

<a href="#">Export to CSV</a>			
SMS Receive Time	From Number	To Number	Keyword
04/20/2016 15:41	12125552345	12125551212	STOP
04/20/2016 15:36	15122223333	12125551212	STOP

*Note: MDRs are listed in order of creation by default (newest to oldest), but can be re-organized by clicking any of the column headings. Only 10 MDRs are displayed at a time. To view additional MDRs, click the page number or Next button.*

### MDR Results Field Definitions

**SMS Receive Time:** The date and time the text was received.

**From Number:** The originating number for the text.

**To Number:** The destination number for the text.

**Keyword:** The keyword match that was found for this text.

## 7.2.2 View Inbound MDR Detail

All call information is stored on the MDR. To view the MDR detail:

- Click the Message Date Time of the MDR to view.
- The Show Message Detail screen is displayed.

### Show Inbound SMS Detail

SMS Receive Time	04/20/2016 15:41:06
SMS Disposition	SMS Delivered
To Number	12125551212
From Number	12125552345
Message	STOP
Keyword	STOP
Auto Reply Text	We are sorry to see you go. You will be removed from our SMS list within 48 hours. Call 18005555555 for help.
Auto Reply SMS Code	2501
Auto Reply SMS Description	SMS was delivered to handset
Auto Reply SMS Sent Time	04/20/2016 15:41:06
Auto Reply SMS Callback Time	04/20/2016 15:41:20
Forwarding Url	http://myserver.mydomain.com/handleStop/
Forwarding Url Status	200

### Show Inbound Message Detail Record Field Definitions

*Note: The following fields are displayed for all MDRs.*

**SMS Receive Time:** The date and time the message was received.

*Note: This is the system time of the host, which may not be the time the called party actually sent the text if they are in a different time zone.*

**SMS Disposition:** The disposition returned for the text.

**To Number:** The destination number for the text.

**From Number:** The number the text was sent from.

**Message:** The message that was delivered.

**Keyword:** The keyword match that was found for this text.

**Auto Reply SMS Text:** This is the text sent back to the originator of the inbound text as an auto-reply.

**Auto Reply SMS Code:** The numeric code associated with the delivery status for the auto-reply.

**Auto Reply SMS Description:** The description associated with the auto reply SMS Code.

**Auto Reply SMS Sent Time:** The time the auto-reply was sent.

**Auto Reply SMS Callback Time:** The time we received the final status for the auto-reply message.

**Forwarding URL:** The URL to which the inbound text was forwarded.

**Forwarding URL Status:** The status code received when we forwarded the inbound text to the forwarding URL.

3. To return to the Call Detail List screen, you can either:

- Click the MDR List button.

*Note: This returns you to the Message Detail List screen, however, all search criteria is removed.*

- Click the browser's Back button.

*Note: This returns you to the Call Detail List screen while preserving all search criteria.*

### 7.2.3 Export to CSV

The Export to CSV link is used to export all MDRs matching the search criteria to a csv file. The exported file includes a header, separate line for each MDR and a total count for each call disposition.

To Number	From Number	keyword	message	SMS DateTime	Auto Reply Disposition	Auto Reply Text	Auto Reply SMS Code	Auto Reply SMS Description	Auto Reply Forwarding URL
12125551212	12125552345	STOP	STOP	4/20/2016 15:41	SMS Delivered	We are sorry to see	2501	SMS was delivered #####	http://myserve
12125551212	15122223333	STOP	STOP	4/20/2016 15:36	SMS Delivered	We are sorry to see	2501	SMS was delivered #####	http://myserve
16175862943	15205591191	HELLO	HELLO	4/6/2016 10:54	SMS Delivered	Thank you for your	2501	SMS was delivered #####	

#### Export Results Field Definitions

*Note: The following fields are displayed for all MDRs.*

**To Number:** The destination number for the text.

**From Number:** The number the text was sent from.

**Keyword:** The keyword match that was found for this text.

**Message:** The message that was delivered.

**SMS Date Time:** The date and time the message was received.

*Note: This is the system time of the host, which may not be the time the called party actually sent the text if they are in a different time zone.*

**Auto Reply Disposition:** The current state of the auto-reply.

**Auto Reply SMS Text:** This is the text sent back to the originator of the inbound text as an auto-reply.

**Auto Reply SMS Code:** The numeric code associated with the delivery status for the auto-reply.

**Auto Reply SMS Description:** The description associated with the auto reply SMS Code.

**Auto Reply SMS Sent Time:** The time the auto-reply was sent.

**Forwarding URL:** The URL to which the inbound text was forwarded.

**Forwarding URL Status:** The status code received when we forwarded the inbound text to the forwarding URL.

## 8 DNCs

A Do Not Call (DNC) list is used to record the phone numbers of called parties that do not wish to be called with future campaigns. When receiving a call from a Blast or Custom campaign, the called party should have the ability to opt out of future calls. If they press '9', their number is added to this list. Phone numbers can also be manually added/removed from the list. If a number is on this list, it will be removed from the import file when creating future campaigns.

### 8.1 Do Not Call List

The Do Not Call List screen allows you to view all current phone numbers on the DNC list, search for a phone number or delete phone numbers from the list.

Phone Number	Add Date
011447747457505	08/03/2013
14025551212	07/21/2013
17136548512	05/10/2013
18036541248	09/09/2013

*Note: The phone numbers are listed in ascending order by default, but can be re-organized by Phone Number or Add Date. Only 100 phone numbers are displayed at a time. To view additional phone numbers, click the page number or Next button.*

#### Do Not Call List Field Definitions

**Phone Number:** The phone number of the called party who no longer wishes to be called with future campaigns.

**Add Date:** The date the phone number was added to the list. This is the date the number was either manually added or when the called party opted out.

### 8.2 Add Phone Number

Phone numbers can be manually added to the DNC list.

1. To add a phone number, click the Add Phone Number.

2. The Add Phone Number screen is displayed.
  - Enter the phone number to add a single number.
  - Upload CSV File, phone numbers can be uploaded in bulk using csv file format.  
The csv file has a single column in which valid header can be any of the following: phonenumber, phonenumber, tn and msisdn.



## Add Phone Number

Phone Number

Upload CSV File

*Note: The phone number must be between 10 and 15 digits. If the number entered is 10 digits, a leading 1 is added on insert. If the number entered is greater than 10 digits, no changes are made on insert.*

## 3. Click one of the following:

- Click Save, to add the phone number(s) and return to the Do Not Call List.
- Click Save & Add Another, to add the phone number(s) and remain on the Add Phone Number screen to add more number.
- Click Cancel to return to the Do Not Call List screen without adding the number.

## Add Phone Number

Phone Number

Upload CSV File

## 4. The phone number is added to the list.

Phone Number 13097854125 created

## Do Not Call List

<input type="checkbox"/>	Phone Number	Add Date
<input type="checkbox"/>	011447747457505	08/03/2013
<input type="checkbox"/>	13097854125	09/09/2013
<input type="checkbox"/>	14025551212	07/21/2013
<input type="checkbox"/>	17136548512	05/10/2013
<input type="checkbox"/>	18036541248	09/09/2013

## 8.3 Delete Phone Number

A single or multiple phone numbers can be removed from the list at one time. If a number is removed from the list, then it will again be inserted on import when creating future campaigns.

## 1. Click the checkbox next to the phone number(s) you wish to remove from the list.

*Note: The Delete All Checked button is grayed out until at least one checkbox is clicked.*

## Do Not Call List

<input type="checkbox"/>	Phone Number	Add Date
<input type="checkbox"/>	011447747457505	08/03/2013
<input type="checkbox"/>	13097854125	09/09/2013
<input checked="" type="checkbox"/>	14025551212	07/21/2013
<input checked="" type="checkbox"/>	17136548512	05/10/2013
<input type="checkbox"/>	18036541248	09/09/2013

## 2. Click the Delete All Checked button.

## Do Not Call List

<input type="checkbox"/>	Phone Number	Add Date
<input type="checkbox"/>	011447747457505	08/03/2013
<input type="checkbox"/>	13097854125	09/09/2013
<input checked="" type="checkbox"/>	14025551212	07/21/2013
<input checked="" type="checkbox"/>	17136548512	05/10/2013
<input type="checkbox"/>	18036541248	09/09/2013

Delete All Checked

- A confirm box is displayed.

Confirm

Are you sure you want to delete the selected phone numbers?

Cancel

Yes

Click Yes to remove the phone number(s). Else click Cancel.

- The selected phone number(s) are removed from the list.

2 Phone Number(s) deleted

Do Not Call List

<input type="checkbox"/>	Phone Number	Add Date
<input type="checkbox"/>	011447747457505	08/03/2013
<input type="checkbox"/>	13097854125	09/09/2013
<input type="checkbox"/>	18036541248	09/09/2013

## 8.4 Search Phone Numbers

The search option allows you to see if a specific phone number is included in the list or if a range of numbers are included.

- Enter the phone number in the Search box. You can enter the specific number or part of one by using a wildcard (\* or %). A wildcard can be used at the beginning, end or middle of the phone number. For example, '1402\*' returns only phone numbers that start with '1402'. Whereas, '%402%' returns all phone numbers that includes '402' anywhere in the number (e.g. '14025551212' and '011440214586512').

Search

- Click Search.

Search

- Only the matching numbers are returned.

DNC List

Add Phone Number

Search

Do Not Call List

<input type="checkbox"/>	Phone Number	Add Date
<input type="checkbox"/>	13097854125	09/09/2013
<input type="checkbox"/>	18036541248	09/09/2013

## 9 Contact Lists

Contact Lists allow you to maintain a permanent list of contacts that you can use for campaigns. There are two types of lists. The standard list is made up of a list of phone numbers and names or descriptions. The second type of list also allows you to configure specific call times for each contact in the list.

### 9.1 Add a Contact List

#### Contact List Field Definitions

**Name:** The name of the list



: Edit the contact list



: Delete the contact list


### 9.2 Add A Contact List

Contact Lists may be added.

1. To Add a Contact List, click Add List.
2. The Add Contact screen is displayed.
  - Enter a name for the contact list
  - If you wish to use custom call times, check the box. The custom call times allow you to define a specific time when this contact will be called. Lists that use custom call times may only be used only for repeatable campaigns.
3. Click Add. The list is added and the Edit Contact List screen is displayed.
  - On the Edit Contact List screen you may edit the name or the custom call times designation.
  - You may also add Custom Call Data. Custom Call Data are fields you want to store with each contact. Later you will be able to create contacts one at a time or upload a batch of contacts. You Custom Call Data may be entered or uploaded with each contact. Note that only columns you include in the list definition will be stored with each contact. To create custom call data, add the name of the custom data and click Add.
4. Click Update if you changed any data in the top section. You will be returned to the Contact Lists screen.

### 9.3 Edit a Contact List

Anytime after a list is created, you can edit its properties.

1. Click  next to the Contact List you wish to edit. The Edit Contact List screen is displayed.
  - On the Edit Contact List screen you may edit the name or the custom call times designation.


- You may also add Custom Call Data. Custom Call Data are fields you want to store with each contact. Later you will be able to create contacts one at a time or upload a batch of contacts. You Custom Call Data may be entered or uploaded with each contact. Note that only columns you include in the list definition will be stored with each contact. To create custom call data, add the name of the custom data and click Add.

FIG 9-1

- To delete custom call data, click the Delete button next to the Custom Data you want to delete. Note that this will not impact any existing data stored with existing contacts. However, this data will become inaccessible through the screens.
2. Click Update if you changed any data in the top section. You will be returned to the Contact Lists screen.

## 9.4 Viewing Contacts in a Contact List

On the Contact screen you can view contacts for a selected contact list.

1. While viewing the Contact Lists screen, click on the Contact List to see a list of its contacts.
- FIG 9-2
2. From this screen you can edit the Contact List itself by clicking  in the top right.

### Contact List Field Definitions

**Name:** The name of the contact.

**Phone Number:** The phone number of the contact.

**Last Modified:** The date the contact was last updated.

## 9.5 Adding a Contact to a Contact List

You can add contacts to a list one at a time.

### 9.5.1 Adding a Standard Contact

1. To add a single contact, click Add Contact.
  2. The add contact screen is displayed.
- FIG 9-3
3. Complete all required fields and any Custom Data fields you require.

#### Add Contact Field Definitions

**Name\*:** The name for this contact. This can be any description that is useful for you.

**Phone Number\*:** The phone number for this contact.

**Active:** Uncheck this box if the contact is inactive and should no longer receive calls.

**Custom Data:** This section displays any custom fields that you created for your list. You may complete them, or leave them blank as needed.

4. Click Create to add the Contact to the list. You will be returned to the Contact List screen for the list you are working with.

## 9.5.2 Adding a Contact with Custom Call Times

*Note that lists with custom call times are currently limited to daily repeating campaigns. However, the frequency of the calls to a specific contact can be controlled per contact.*

1. To add a single contact, click Add Contact.
2. The add contact screen is displayed.
3. Complete all required fields and any Custom Data fields you require.

### Add Contact Field Definitions

**Name\*:** The name for this contact. This can be any description that is useful for you.

**Phone Number\*:** The phone number for this contact.

**Active:** Uncheck this box if the contact is inactive and should no longer receive calls.

**Time Zone:** The time zone for the contact

**Time Sunday-Time Saturday:** The time at which to call this contact on each day of the week. Leave blank

**Custom Data:** This section displays any custom fields that you created for your list. You may complete them, or leave them blank as needed.

4. Click Create to add the Contact to the list. You will be returned to the Contact List screen for the list you are working with.

## 9.6 Viewing or Editing a Contact

You can edit individual Contacts.

### 9.6.1 Working with standard Contacts

1. In the Contact List, click the name of the Contact you wish to view. The Edit Contact screen is displayed so you can view the data for the contact.
2. Alter any fields as needed.
3. Click Update to save your changes.

### 9.6.2 Working with Contacts with Custom Call Times

1. In the Contact List, click the name of the Contact you wish to view. The Edit Contact screen is displayed so you can view the data for the contact.
2. Alter any fields as needed.  
The time zone is required. If a time is left blank, Nimblevox will not call the contact on those days.
3. Click Update to save your changes.
4. If you choose to delete the contact, click the delete button.

## 9.7 Uploading a Batch of Contacts

If you have a list of contacts in a spreadsheet or CSV file, you can upload them to your contact list.

### 9.7.1 Uploading standard Contacts

1. Click Upload Contacts
2. The Upload Contacts screen is displayed.
3. Click Choose File to select a file from your computer's file system to upload. The file must be a CSV file, which is a comma-delimited file. The only required fields are Name and TN, as shown in the first example below. You may optionally include the Active column, using TRUE or FALSE to indicate whether the contact is active or not. If the Active column is omitted, the contact will be considered active. If you choose to use custom call data, then the Active column is required. All custom call data columns must follow the Active column, but they may be in any order, but the first core fields must be in the order indicated (Name, TN, Active).

#### *Example Files*

- Name, TN  
John Smith, 5552223333  
Julia Foster, 5559992222
  - Name, TN, Active, Grade, Home Room Teacher, Birthdate  
John Smith, 5552223333, TRUE, 4, Jones, 2006-12-3  
Julia Foster, 5559992222, FALSE, 6, Thompson, 2004-4-4
4. If you want to delete the current list and replace it with the list you are uploading, click Replace.
  5. If you want to upload a list of numbers that may contain both new numbers and existing numbers that require updates, click Update Existing Entries. Note that if this is not clicked, then any duplicates will result in an error and will not be imported.
  6. Click Upload to upload the list.
  7. The screen will indicate it is uploading numbers. It will continue in the background until the upload is complete. You will not be able to add or modify other numbers in this list until the upload is complete.

### 9.7.2 Uploading Contacts with Custom Call Times

1. Click Upload Contacts
2. The Upload Contacts screen is displayed.
3. Click Choose File to select a file from your computer's file system to upload. The file must be a CSV file, which is a comma-delimited file. The only required fields are Name and TN, as shown in the first example below. You may optionally include the Active column, using TRUE or FALSE to indicate whether the contact is active or not. If the Active column is omitted, the contact will be considered active. If you choose to use custom call data, then the Active column is required. All custom call data columns must follow the Active column, but they may be in any order, but the first core fields must be in the order indicated (Name, TN, Active).

*Note that all times must be in the format HH:MM. The timeZone must be one of the following abbreviations. For North America, this is one of the following:*

- AST: Atlantic Standard Time
- EST: Eastern Standard Time
- CST: Central Standard Time
- MST: Mountain Standard Time
- PST: Pacific Standard Time

- AKS: Alaska Standard Time
- HAS: Hawaii-Aleutian Standard Time

#### Example Files

- Name, TN, Active, timeSunday, timeMonday, timeTuesday, timeWednesday, timeThursday, timeFriday, timeSaturday, timeZone

John Smith, 5552223333, TRUE,,08:00,,,09:00,,,EST

Julia Foster, 5559992222, FALSE,,,,,,,,EST

- Name, TN, Active, timeSunday, timeMonday, timeTuesday, timeWednesday, timeThursday, timeFriday, timeSaturday, timeZone, Grade, Home Room Teacher, Birthdate

John Smith, 5552223333, TRUE,,08:00,,,09:00,,,EST,4, Jones, 2006-12-3

Julia Foster, 5559992222, FALSE,,,,,,,,EST, 6, Thompson, 2004-4-4

4. If you want to delete the current list and replace it with the list you are uploading, click Replace.
5. If you want to upload a list of numbers that may contain both new numbers and existing numbers that require updates, click Update Existing Entries. Note that if this is not clicked, then any duplicates will result in an error and will not be imported.
6. Click Upload to upload the list.
7. The screen will indicate it is uploading numbers. It will continue in the background until the upload is complete. You will not be able to add or modify other numbers in this list until the upload is complete.

### 9.7.3 Viewing Import Errors

1. After each upload, check the Last Upload Summary for any errors.



- The top section indicates the number of items in the file, the number successfully imported, the number of duplicates, the number of contacts that were updated rather than inserted, and the number of errors.
- The bottom section delineates which line numbers caused each error or duplicate. These may be corrected and re-imported or entered manually with the Add Contact screen.

### 9.8 Deleting Multiple Contacts

There are two ways to delete a contact.

1. From the Contact List screen, select all contacts you want to delete.
2. Click the Delete All Checked button.
3. The system will ask you to confirm the deletion. Choose Yes or Cancel.

### 9.9 Deleting a Contact List

You may delete an entire contact list if it hasn't been used for a campaign yet.

1. Click  next to the contact list you wish to delete.



CampaignsCDRSDNCsContact Lists

Contact ListsAdd List

Contact Lists

Name

Staff

All Students

2. A confirm dialog will be displayed. Deleting a list does delete all contacts within that list. Click Yes or Cancel.

## 10 Appendix A. FTPBlast

*Note: if you wish to use this feature, please contact [Nimblevox Sales](#).*

The FTPBlast server allows you to create multiple campaigns by simply uploading a template file (*multiple template files can be created, each with different default values*) and a csv file for each campaign to be created. You can have as many template files as you would like; each with a unique name. Format for the tpl filename is: <templateName>.tpl. The name of the csv determines which tpl file is used when creating the campaign. Format for the csv filename is TN\_<template\_name>\_xxx.csv.

### Example Filenames

Template Files:

BlastWithOptOut.tpl

DM.tpl

csv Files:

TN\_BlastWithOptOut\_20130701.csv

TN\_BlastWithOptOut\_20130801.csv

TN\_DM\_1.csv

The first two csv files will use the BlastWithOptOut.tpl template to create the campaign. The third csv file will use the DM.tpl template to create the campaign.

*Note: The records in the csv file must still be in the correct format. See examples under [???](#) for details.*

### Example Templates

*Note: Fields in red are required. Fields in blue are set to default values if not included.*

#### Blast.tpl

```
name=Blast
startDate=T
endDate=T+7
startTime=08:00
endTime=17:00
daysOfWeek=Sunday,Monday,Tuesday,Wednesday,Thursday,Friday,Saturday
emailResults=No
callerId=4024768786
paused=No
campaignType=Blast
answeredPrompt=answered.wav
answeringMachinePrompt=machine.wav
disableOptOut=No
optOutPrompt=opt_out.wav
apiKey=0XE4dK4mIWuiT8OCPZnzRIlCK5nGNNmReS7CmsjIXFXjtzrNd8YPkp3NbyLrZPot
ignoreTimeZoneRestrictions=yes
maxConcurrentCalls=10
defaultRetryCount=1
defaultRetryDelay=600
dispositionQuotaName=Busy
dispositionQuotaAmount=10
dailyDispositionQuotaName=Answering Machine
dailyDispositionQuotaAmount=15
retryCallDispositionNames=Busy
retryDispositionCounts=1
retryDispositionDelays=5000
retryMilestones=Started human audio
milestoneRetryCounts=31
milestoneRetryDelays=2000
milestoneQuotaNames=Answered
milestoneQuotaCounts=5
allowDuplicates=No
```

**Direct\_Message.tmpl**

```

name=DirectMessage
startDate=T
endDate=T+7
startTime=01:00
endTime=23:00
daysOfWeek=Monday,Tuesday,Wednesday,Thursday,Friday
emailResults=Yes
callerId=4024768786
paused=Yes
campaignType=Direct_Message
answeredPrompt=answered.wav
answeringMachinePrompt=machine.wav
apiKey=0XE4dK4mIWuiT8OCPZnzRIlCK5nGNNmReS7CmsjIXFXjtZrNd8YPkp3NbyLrZPot
ignoreTimeZoneRestrictions=yes
maxConcurrentCalls=10
directMsgRingTime=5
defaultRetryCount=0
#defaultRetryDelay=3600
#dispositionQuotaName=Busy
#dispositionQuotaAmount=10
#dailyDispositionQuotaName=SIT
#dailyDispositionQuotaAmount=15
#retryCallDispositionNames=Busy,Answered
#retryDispositionCounts=1,2
#retryDispositionDelays=5000,3000
#retryMilestones=Started human audio,Empty
#milestoneRetryCounts=10,40
#milestoneRetryDelays=2000,1000
#milestoneQuotaNames=Answered,Told
#milestoneQuotaCounts=5,6
#allowDuplicates=No

```

**Custom.tmpl**

```

name=Custom
startDate=T
endDate=T+7
startTime=17:00
endTime=20:00
daysOfWeek=Monday,Wednesday,Friday
emailResults=No
callerId=4024768786
paused=No
campaignType=Custom
customIvrService=c90a-becf-409f-b71d-b91947257aa0
apiKey=0XE4dK4mIWuiT8OCPZnzRIlCK5nGNNmReS7CmsjIXFXjtZrNd8YPkp3NbyLrZPot

```

**Template File Field Definitions**

**name:** The name of the campaign. When the campaign is created, it will be called:

<name>\_<yyyymmddhhmmss>

**startDate:** The date to start the campaign. This must remain set to "T". This configures the date to be the current system date.

**endDate:** The date to end the campaign. This must remain set to "T+#". This configures the date to be the current system date + the number of days configured.

**startTime:** The time (*hh(24):mm*) to start the campaign each day. This can be between 00:00 and 23:59.

**endTime:** The time (*hh(24):mm*) to stop the campaign each day. This can be between 00:00 and 23:59.

**daysOfWeek:** The days of the week to run the campaign. Enter the valid days separated by a comma.

**emailResults:** If set to Yes (*default*), an Excel spreadsheet of all exported CDRs is sent on campaign completion. The zip file is attached to an email that is sent to the email address configured on your Nimblevox account. If set to No, nothing is sent on campaign completion.

**callerId:** The phone number to display as the caller id for outbound calls.

**paused:** If set to Yes, the campaign is created in the Paused state and will not start until manually resumed. If set to No (*default*), the campaign is created in the Active state.

**campaignType:** The type of campaign. There are three types available:

- **Blast:** A Blast campaign uses the default Blast application. This application requires you to upload both an Answered Prompt (*call is answered*) and an Answering Machine Prompt (*call is not answered and goes to their voicemail or answering machine*) to be played. An optional Opt Out Prompt can also be uploaded.
  - answeredPrompt:** The prompt played if the call is answered. The prompt must already be uploaded on the account.
  - answeringMachinePrompt:** The prompt played if the call is not answered and it goes to their answering machine. The prompt must already be uploaded on the account.
  - disableOptOut:** If set to No (*default*), the optOutPrompt field must be configured with the opt out prompt to be played during the campaign. If set to Yes, no opt out prompt is played during the campaign.
  - optOutPrompt:** The prompt played to inform the called party of their right to opt out of future campaigns. The prompt must already be uploaded on the account.
- **Custom:** A Custom campaign uses a custom application which is created and deployed under your Nimblevox user account on Build (*see the Nimblevox Build User's Guide for details*).
  - customIVRService:** Enter the UUID for the Service (*the UUID can be found on the Deploy Application screen within Build*).
- **Direct\_Message:** A Direct Message campaign uses the default Direct Message application. This application requires you to upload just an Answering Machine Prompt because the application drops the message directly to the mobile phone's voicemail.
  - answeredPrompt:** The prompt played if the call is answered. The prompt must already be uploaded on the account. This is optional for Direct Message campaigns.
  - answeringMachinePrompt:** The prompt played to the called party's answering machine. The prompt must already be uploaded on the account.

**apiKey:** The apiKey assigned to your account.

**ignoreTimeZoneRestrictions:** If set to Yes, any timezone restrictions setup are ignored. If set to No (*default*), any timezone restrictions setup are applied.

**Max Concurrent Calls:** The maximum number of calls to send to the IVR at once. Note that each account has a channel limit. You may set the max concurrent calls for any individual campaign to any value between 0 (no calls will be sent) to your account channel limit. If you are running multiple campaigns and the total concurrent calls across all campaigns exceeds the limit for your account, the Blast call generator will still limit the total number of active calls across all active campaigns to your account limit.

*If you would like to increase your account channel limit, please contact [Nimblevox Sales](#).*

**defaultRetryCount:** The number of retries made for each phone number where the disposition returned was System Error or Other. If set to 0, no retries are automatically performed.

**defaultRetryDelay:** The number of seconds to wait before performing a retry. The default is 3600 seconds.

**directMsgRingTime:** The number of seconds to wait before disconnecting the call if it has not yet been deflected to the mobile phone's voicemail. This is used in an attempt to keep the called party's phone from ringing. This only applies to Direct Message campaigns. The default value is 5 seconds.

*Note: Currently, only whole seconds is allowed.*

**retryCallDispositionNames:** Enter the disposition name(s) to retry. Multiple disposition retries can be configured per campaign (*comma separated*); one per disposition. Available options are: Busy, No Answer, Other, System Error, SIT or Fax.

**retryDispositionCounts:** The number of times to perform the retry. One entry is needed for each disposition (*comma separated*).

**retryDispositionDelays:** The number of seconds to wait before performing a retry. The default is 3600 seconds. One entry is needed for each disposition separated by a comma.

**retryMilestones:** Enter the milestone(s) to retry. The wording must be exactly the same as configured in the application used for the campaign (*see the Nimblevox Build User's Guide for information on how to add milestones within your custom application*). Multiple milestone retries can be configured per campaign (*comma separated*); one per milestone. *See ??? for the available milestones for Blast and Direct Message campaigns.*

**milestoneRetryCounts:** The number of times to perform the retry. One entry is needed for each milestone (*comma separated*).

**milestoneRetryDelays:** The number of seconds to wait before performing a retry. The default is 3600 seconds. One entry is needed for each milestone separated by a comma.

**milestoneQuotaNames:** Enter the milestone(s) to retry. The wording must be exactly the same as configured in the application used for the campaign (*see the Nimblevox Build User's Guide for information on how to add milestones within your custom application*). Multiple milestone quotas can be configured for the campaign (*comma separated*); one per milestone. Once any one of the configured quotas is met, the campaign is considered complete and no further calls are initiated. *See ??? for the available milestones for Blast and Direct Message campaigns.*

**milestoneQuotaCounts:** The number at which the quota is met. One entry is needed for each milestone (*comma separated*).

**dispositionQuotaName:** Enter the disposition name to use for the campaign quota. Available dispositions are: Answering Machine, Answered, Busy, No Answer, Other, System Error, SIT and Fax. When the disposition quota is met, the campaign is considered complete and no further calls are initiated. There can be only one disposition quota per campaign.

**dispositionQuotaAmount:** The number at which the quota is met.

**dailyDispositionQuotaName:** Enter the disposition name to use for the daily quota. Available dispositions are: Answering Machine, Answered, Busy, No Answer, Other, System Error, SIT and Fax. When the daily disposition quota is met, the campaign is considered complete for the day and no further calls are initiated. The following day (*if the end date has not been reached*), the quota is reset and the campaign is resumed. There can be only one daily quota per campaign.

**dailyDispositionQuotaAmount:** The number at which the quota is met.

**allowDuplicates:** If set to Yes, all records from the import file with duplicate phone numbers are imported. An exception is written for each duplicate for informational purposes. If not to No (*default*), all records with duplicate phone numbers (*except for the first record*) are removed and an exception is written.

### FTPing Files

*Note: Your username and password, along with a directory will be created and assigned to your account.*

To FTP the files onto the server, perform the following steps:

1. Open a command prompt window
2. Enter the command:

```
ftp my.nimblevox.com
```

3. Enter your username and password:

*Note: If you forget your username or password, Please contact [support@nimblevox.com](mailto:support@nimblevox.com).*

```
User: <username>
331 Please specify the password.
Password: <password>
230 Login successful.
ftp>
```

4. Now you can put your files onto the system. You can place all files into your main directory or you can create sub-folders. If sub-folders are created, each sub-folder must contain both the template and csv files.

### Processing of Files

The FTPBlast server is configured to look for new, unprocessed, csv files every 5 minutes. If a new csv file is found and there is a corresponding template file, the csv file is processed. If a campaign is successfully created, the csv filename is appended with .processed (e.g. *TN\_Blast\_20130701.csv.processed*). If there are any errors while attempting to create the campaign, the csv filename is appended with .error (e.g. *TN\_DM\_CustomerXYZ.csv.error*).

## 11 Appendix B. Survey Definition Files

A Survey Definition File (SDF) is a CSV file that defines a survey you want to run. You will configure questions, allowed responses, and error handling for your survey.

### Sample File

This is a sample of an SDF for a simple two-question survey that also allows the user to leave a verbal message at the end to provide feedback.

lineid	campaignid	response_type	input_type	start	min_value	max_value	timeout	answered_next
introduction	Care	0	DTMF	yes				question_1
question_1	Care	2	BOTH		1	5	5000	question_2
question_2	Care	1	BOTH		1	2	5000	recording_1
recording_instructions	Care	0	BOTH					record_1
record_1	Care	4	BOTH				30000	
Dnu_1	Care	0	DTMF					
Dnu_2	Care	0	DTMF					

### Column Definitions

**lineid:** A unique identifier for this line of the SDF. It must only contain letters, numbers and underscores. It will be used to reference this line of the file and to populate milestones for your campaign statistics.

**campaignid:** The alphanumeric name of the survey.

**response\_type:** The type of response expected by the prompt.

- 0 – No response expected. This is used for instructional prompts or any prompt where the user is not expected to respond.
- 1 – Binary (1 = yes, 2 = no)
- 2 – Scale between min\_value and max\_value
- 3 – Reserved for Future Use
- 4 – Record a verbal response

**input\_type:** The expected type of input a prompt can receive. If no input is expected, this value is ignored.

- DTMF - Touchtones only
- ASR - Voice only
- BOTH - Both touchtones and voice

**start:** A “yes” value is placed here on the line where the survey should start. (This is only valid for one lineid)

**min\_value:** Indicates the minimum value that can be entered in response to the question. This must be between 0 and 8.

**max\_value:** Indicates the maximum value that can be entered in response to the question. This must be between 1 and 9.

**timeout:** The amount of time (in milliseconds) that a user has to respond to a prompt after the prompt has finished playing. Also used as the maximum time a recording can be Ex: 5000 = 5 seconds

**answered\_next:** The next lineid that should be played following a correct response from the previous question.

**noinput\_X:** Indicates the lineid to play if the user does not respond to the question in the time allowed. After this prompt is played, the next prompt will either be a replay of the question, or the lineid configured in the return\_to field. The X in the column name indicates the number of attempts to answer the question. In the sample file, if the respondent does not respond after the first attempt, it will use column noinput\_1,



which is configured to play lineitem Dnu\_1, which might be a prompt that says "I didn't catch that. Please try again." Then it will repeat the question. If the respondent does not respond to the second attempt, it will use noinput\_2, which is configured to play Dnu\_2, which says "Thank you for your time. Good Bye" and exits the survey. The survey will always exit after the "noinput\_X" field with the highest value for X.

**invalid\_X:** Indicates the lineid to play if the user responds with an answer that is not within the configured min\_value/max\_value range. After this prompt is played, the next prompt will either be a replay of the question, or the lineid configured in the return\_to field. The X in the column name indicates the number of attempts to answer the question. In the sample file, if the respondent provides an invalid response after the first attempt, it will use column invalid\_1, which is configured to play lineitem Dnu\_1, which might be a prompt that says "I didn't catch that. Please try again." Then it will repeat the question. If the respondent provides an invalid response to the second attempt, it will use invalid\_2, which is configured to play Dnu\_2, which says "Thank you for your time. Good Bye" and exits the survey. The survey will always exit after the "invalid\_X" field with the highest value for X.

**return\_to:** A lineid that is played following any no input or invalid response. This is primarily used for questions where multiple prompts constitute one question.

**prompt:** The text value of a tts prompt type, or the filename of the audio prompt type. For tts, this is the full text to play and it may include data from your input file. For example if your number list includes a column "FirstName" and "LastName", then your prompt may say "Hello @=args.FirstName@. Do you have time for a brief survey?". If you are using pre-recorded audio then this is the path/filename relative to your Nimblevox storage prompts directory. If the prompt is contained within a subfolder, this is the full path to the prompt, relative to your prompts directory (example CompanyABCPrompts/Instruction.wav). If the prompt is just sitting in your prompts folder, then only the prompt name is required (e.g. Instruction.wav)

**prompt\_type:** The type of prompt to be played. Values: tts - Text to speech audio - Audio file record - Recording

- tts - Text-to-Speech -- if selected, the prompt column must contain the full text to play.
- audio - Audio recording -- if selected, the prompt column must contain the path and filename relative to your Nimblevox storage prompts directory



**NewNet Communication Technologies, LLC**  
2 Trap Falls Road, Suite 504, Shelton, CT 06484  
Tel. +1 203.926.0049 Fax. +1 203.647.0580

**Chicago**  
**NewNet Communication Technologies**  
**Arlington Ridge Office Center**  
3223 N. Wilke Road  
Arlington Heights, IL 60004  
+1 847.253.9200

**Lincoln**  
**NewNet Communication Technologies**  
**Centre Terrace**  
1225 L Street, Ste. 300  
Lincoln, NE 68508  
+1 402.476.8786

**India**  
**NewNet Techno Engineering India Pvt Ltd**  
G001 Ground floor, Sigma Soft Tech Park  
Ramagondanhali Varthur Hobli  
Bangalore 560066  
+91 80 41528312

**Romania**  
**NewNet Communication Technologies**  
str. Dr. Iacob Felix nr. 70  
Sector 1  
Bucharest  
Romania