



VitalPBX Communicator Reference Guide Ver. 2.5.7

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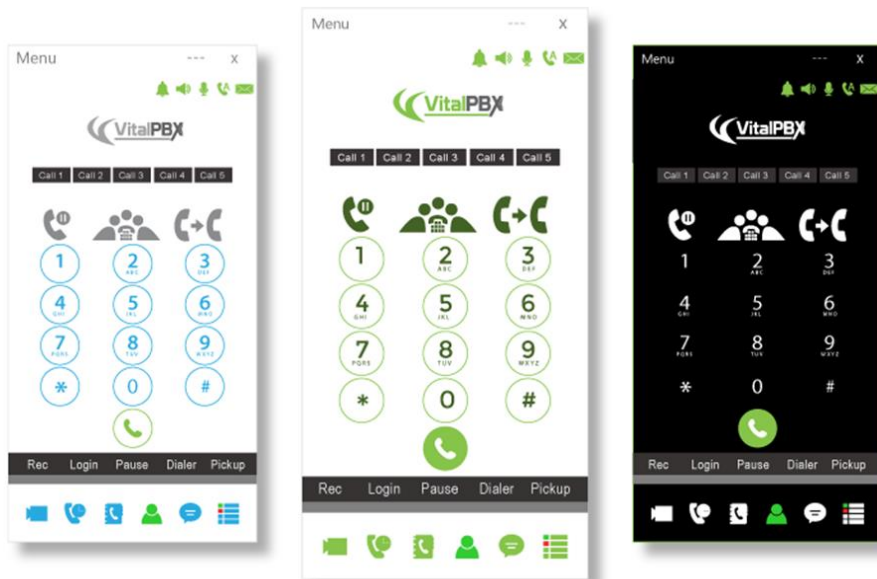
INTRODUCTION

VitalPBX Communicator is a Softphone designed for the Call Center environment and also adapts itself very well to the normal activities of each day in the Company.

1. – VitalPBX Communicator

VitalPBX Communicator is a Windows Softphone that has the following features:

- Login/LogOut to Queues in a Button
- Pause with or without cause in a Button
- Chat
- Presence
- Call Recording
- PickUp Group Button
- Integrated Dialer
- Remote Centralized Dialer - VitalPBX
- Multiple Account
- Phonebook
- Etc.



Description of Display Icons,

- Envelope (✉), go to voice mail. If it is red, you have new voice mail.
- Bell (🔔), Ring On/Off

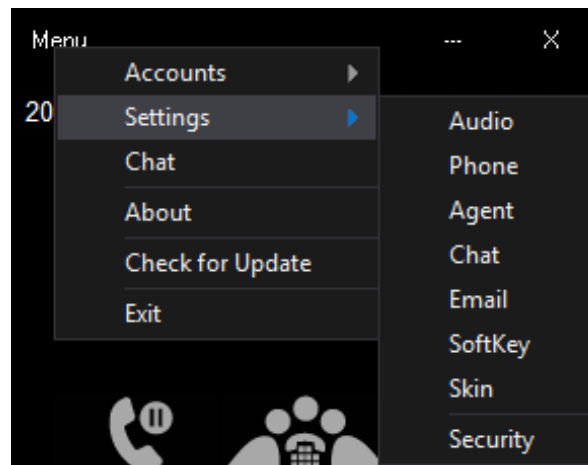
- **Auto Answer** (📞), activating this option will automatically answer the calls as long as the PBX administrator has enabled this option on your softphone.
- **Mic** (🔇), click to mute/unmute microphone.
- **Speaker** (🔊), click to mute/unmute speaker.

Description of below menu Icons,

- **Video** (📺), open/close video screen
- **Recents** (📞), show recents calls
- **Contacts** (📞), show contacts
- **Presence** (👤), change state of presence.
- **Chat** (💬), Go to chat room. if it is red, you have unread chat messages.
- **Console** (📄), open/close console

Menu (☰)

To configure the Softphone, it is necessary to press the Menu Button in the upper left. We will see the following options:



- **Audio**, choose the audio and video device and regulate the volume of audio.
- **Account**, to configure the account(s) to register on the Softphone.
- **Settings**, configures all Softphone features like:
 - Audio
 - Phone
 - Agent
 - Chat
 - Email
 - SoftKey
 - Skin

- Security
- **Chat**, go to the chat interface.
- **Email**, email settings form.
- **Dialer**, this button is enabled only if the user has permission to configure the dialer.
- **About/License**, about VitalPBX Communicator. Install the license for the Business version.
- **Check for Update**, check if there is an update. If an update exists, you can proceed to install it.
- **Exit**, close the Softphone completely. Note: when pressing the top right button with an X, the Softphone is only minimized not to closed, the only way to close the Softphone is through this Button.



Hold, When you receive a call, press the Hold button, it will automatically leave the caller on hold, if you want to retrieve the call again, you can press the Hold button again.

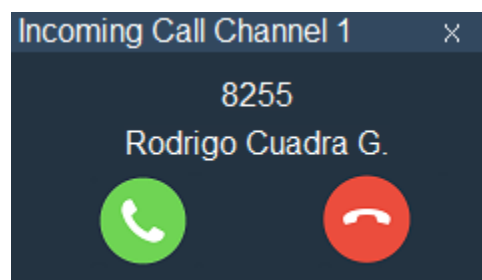


Transfer, To transfer a call after receiving it, simply put it on Hold, dial the number or extension to where you want to transfer it and press Xfer. If the person to whom you want to transfer the call does not want to be transferred, then resume the call by pressing the Hold button.

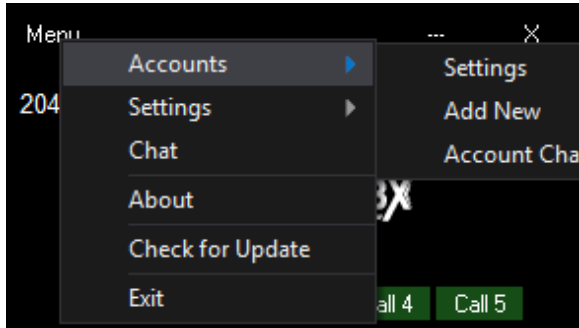


Conference, to create a three-way conference after receiving a call, simply press Hold, dial the number or extension you want to add to the conference, and press Conf.

Receiving more than one call at the same time, if the call waiting option is enabled it is possible to receive more than one call at the same time. Upon receiving the call Popup screen will appear giving us the options of Accept or Decline. If we accept the second call the first one is put on hold, ignoring proceeds to mute the ringing and we can accept it by pressing the button of the line that is flashing.



1.1 Account



Add New

VitalPBX Communicator allows you to create multiple Account with the possibility that every time you start the Softphone the user can select the account you want to use, which is very useful for Call Centers. To configure the accounts, go to Menu and select Account/Add New.

A screenshot of the 'Add New Account' dialog box. The dialog has a title bar with 'Add New Account' and a close button. It contains several input fields: 'Account Name', 'Description', 'Domain', 'Extension', 'User', and 'Password'. Below these are two dropdown menus: 'Profile Name' (set to 'Default') and 'Skin' (set to 'Dark'). At the bottom of the dialog is a 'Save - Exit' button.

In the creation of an Account, we must configure the following fields:

- Account
 - **Account Name**, short name to identify the account.
 - **Description**, brief description to recognize the account.

- **Domain**, IP address or Host where the Softphone is going to register. This property sets registrar server, eg. 'callcentric.com', 'iptel.org' etc. If the registration port is different from 5060 it is possible to include it at the end of the domain in the following way: domain: 5062.
- **Extension**, extension number to be able to be called.
- **User**, this property sets registration username (SIP number, extension).
- **Password**, this property sets registration password
- **Profile Name**, it is the selected configuration to show in the 10 SoftKey.
- **Skin**, it is the color and image settings selected to show in the SoftPhone. These configurations can be changed by editing the file color.txt that is in the skin/default folder. You can add more Skin by simply copying all the contents of the Skin default and changing the name to the folder.

Once the account is created, you can register by entering Account/Account Change. If you want to modify it, you can do it by entering Account/Settings, for this the account must be selected.

Settings

There are many parameters that we can modify in an account, below we show and explain all these parameters. To modify an account, it is necessary that it is selected in Account/Account Change and then go to Account/Settings.

Account

In the creation of an Account, we must configure the following fields:

- Account
 - **Account Name**, short name to identify the account.
 - **Description**, brief description to recognize the account.
 - **Profile Name**, it is the selected configuration to show in the 10 SoftKey.
 - **Skin**, it is the color and image settings selected to show in the SoftPhone. These configurations can be changed by editing the file color.txt that is in the skin/default folder. You can add more Skin by simply copying all the contents of the Skin default and changing the name to the folder.
- Registrar Settings
 - **Domain**, IP address or Host where the Softphone is going to register. This property sets registrar server, eg. 'callcentric.com', 'iptel.org' etc. If the registration port is different from 5060 it is possible to include it at the end of the domain in the following way: domain: 5062.
 - **Extension**, extension number to be able to be called.
 - **User**, this property sets registration username (SIP number, extension).

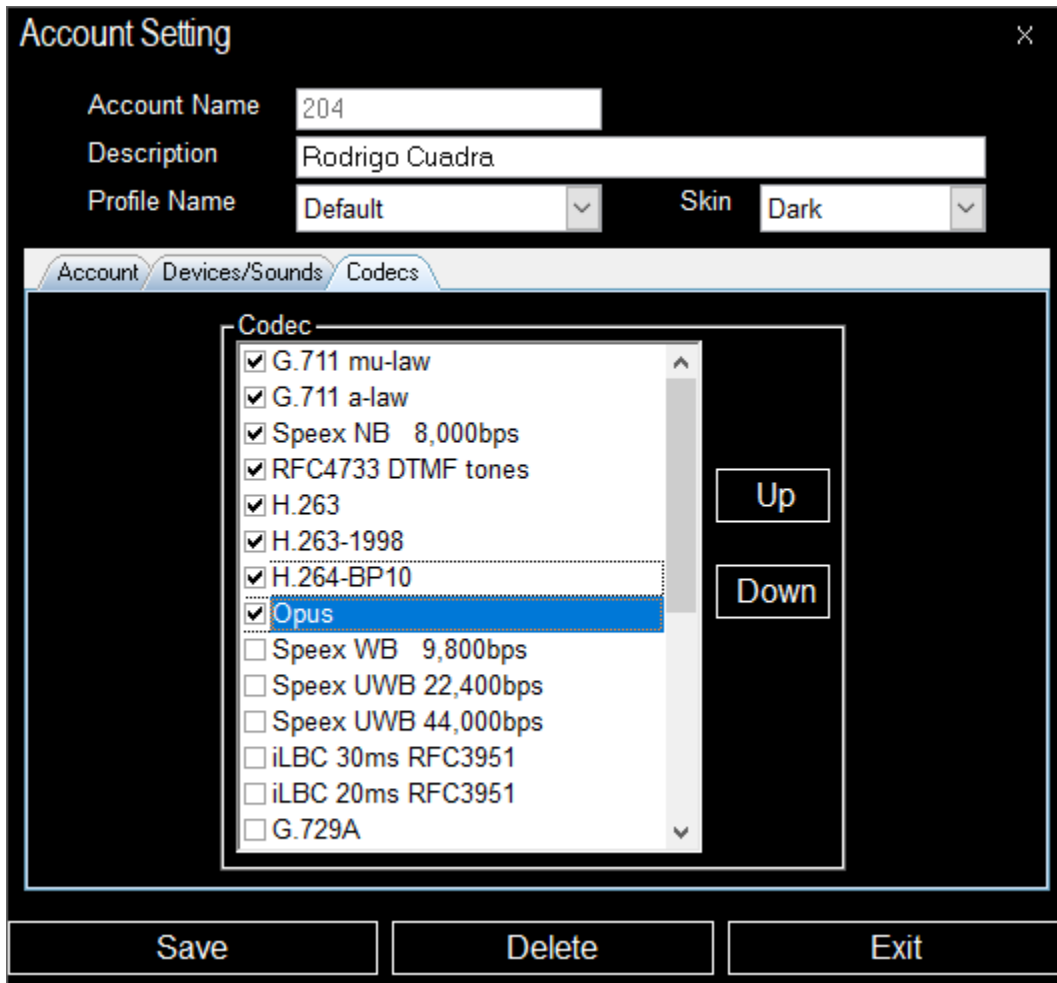
- **AuthID**, this property sets authentication id. Use it, when registrar needs other id that differs from extension number.
- **Password**, this property sets registration password.
- **Outbound Proxy**
 - **Proxy**, this property sets outbound proxy domain.
 - **User**, this property sets outbound proxy username.
 - **Password**, this property sets outbound proxy password.
- **SIP Settings**
 - **Listen Port**, this property changes UDP port number that is used for send/receive SIP messages. By default, this value is equal to 5060.
 - **STUN Server**, Property set STUN server, which VCom will use to resolve public IP:port. A STUN (Simple Traversal of User Datagram Protocol) server allows clients find out their public address, the type of NAT they are behind, and the internet side port associated by the NAT with a particular local port. value example: stun.l.google.com:19302
 - **Expire Time**, this property sets/gets expiration timeout. How long registration remains active, seconds, eg. '300'. Note: When this value is equal to 0, won't send REGISTER message. But 'RegDomain' and 'RegUser' values will be used for outgoing calls.
 - **Signalling Transport**, This property allows set transport, which Vcom uses for sending SIP messages. If you select TLS you must have a valid certificate in VitalPBX and in SIP settings you must enable TLS transport. Also take into account in the registration URL the port of the TLS transport which by default is 5063 for SIP.
 - **Enabled Encrypted Call**, when this property is enabled VCom uses SRTP protocol for sending audio. When this property is disabled VCom uses RTP protocol for sending audio. You must create a SIP profile in VitalPBX that contains the RTP Encryption and AVPF options enabled as well as the Transport is TLS.
 - **ICE Support**, This property allows enable/disable ICE (Interactive Connectivity Establishment) feature. When this option is enabled VCom includes in SDP section of SIP INVITE message list of candidates that can be used for RTP connection. Also has to be set STUN setting. Recommended STUN value is stun.l.google.com:19302. If we enable this option, make sure that in VitalPBX this option is active in the SIP profile.
- **Others**
 - **Ask Account in Start-Up**, each time you start the Softphone you will be asked for the account to register.
 - **Login Password**, if the Ask Account in Start-Up option is activated, the user will be required to enter his/her Password in order to register the account.

Devices/Sounds

The screenshot shows the 'Account Setting' dialog box with the 'Devices/Sounds' tab selected. The 'Account' tab is also visible. The 'Devices' section contains four dropdown menus: 'Speaker' (2757M (NVIDIA High Definition Audio)-1), 'Microphone' (Default), 'Video Device' (Webcam C170-1), and 'Network' (Auto). The 'Sounds' section features two sliders: 'Audio Default Level' and 'Microphone Default Level', both set to 50. Below the sliders are three checkboxes: 'Echo Cancellation', 'Noise Reduction', and 'Auto Gain Control', all of which are currently unchecked. At the bottom of the dialog are three buttons: 'Save', 'Delete', and 'Exit'.

- Devices
 - **Speaker**, default audio speaker.
 - **Microphone**, default microphone.
 - **Video Device**, default video for video call.
 - **Network**, default network interface.
- Sounds
 - **Audio Default Level**, default audio level.
 - **Microphone Default Level**, default microphone level.
 - **Echo Cancellation**, this property enables/disables echo cancelation.
 - **Noise Reduction**, this property enables/disables noise reduction.
 - **Auto Gain Control**, this property enables/disables auto gain control.

Codecs



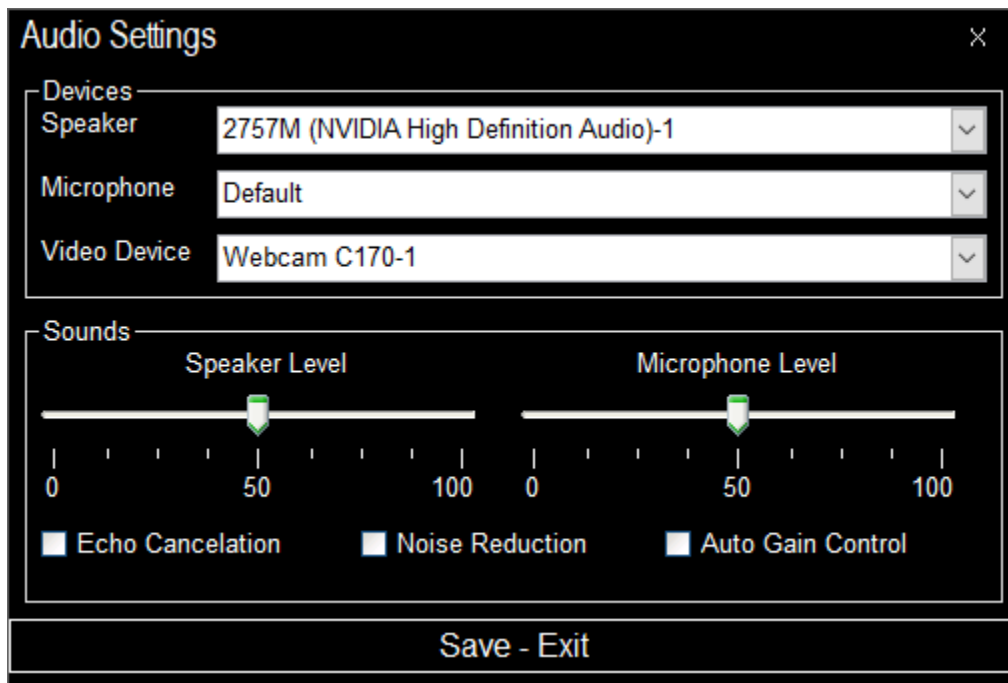
- Codec, check all codecs you want to support.

1.2 Setting

VitalPBX Communicator allows us to modify many options in the environment of the functionality of the Softphone, to modify these options it is necessary to go to Menu/Settings.

1.2.1 Audio

In this form the user can select the audio and video device and regulate the default volume, as well as other options.



- Devices
 - Speaker, default audio speaker.
 - Microphone, default microphone.
 - Video Device, default video for video call.
- Sounds
 - Audio Default Level, default audio level.
 - Microphone Default Level, default microphone level.
 - Echo Cancellation, this property enables/disables echo cancellation.
 - Noise Reduction, this property enables/disables noise reduction.
 - Auto Gain Control, this property enables/disables auto gain control.

1.2.2 Phone Options

Phone Settings [X]

Phone Options

- Auto Answer after seconds
- Auto Answer State Change
- Change Mic Mute/UnMute
- Change Volume Mute/UnMute
- Ring Tone Mute/UnMute
- Mute DTMF Tone
- Show Tooltips
- Audio in Tooltips
- Enable Log File
- Allow Conference
- Allow Record Call
- Allow Call Waiting
- Play DialTone
- Clean Before Paste
- Always on Top
- Allow Dialer
- Open on Windows Sartup

Others Configurations

Show CDR History Days Dial TimeOut Seconds

Internal Phonebook URL

External Phonebook URL

In Settings, we must configure the following options:

- Phone Options
 - **Auto Answer after X seconds**, the call is answered automatically after the number of seconds set have past.
 - **Auto Answer State Change**, allows the user to enable/disable this option. It is not recommended that a Call Center Agent has access to this option.
 - **Change Mic Mute/UnMute**, enable the option to mute the microphone.
 - **Change Volume Mute/UnMute**, enable the option to mute the speaker.
 - **Ring Tone Mute/UnMute**, enable the option to mute the softphone ringtone.
 - **Mute DTMF Tone**, sometimes when we dial a number the sound of the dialing is very annoying, when activating this option, the tone is not heard completely.
 - **Show Tooltips**, displays Tooltips when one is positioned above the field.
 - **Audio in Tooltips**, when a Tooltips is activated, an audio is heard describing the information.
 - **Enable Log File**, enables the creation of log files to determine any inconvenience with the Softphone.
 - **Allow Conference**, enables the possibility of conference.

- **Allow Record Call**, enables the possibility of recording the call on the computer where the Softphone is installed
- **Allow Call Waiting**, allows you to answer more than one call while you are busy with another call.
- **Skip Password in VM**, by enabling this option it is possible to consult the voice mail without having to ask for the password. This integration is with VitalPBX.
- **Play DialTone**, when you select this option you will hear a dial tone.
- **Clean Before Paste**, it is possible to copy and paste a phone number to expedite the dialing of the number, with this option enabled the deletion of any information is enabled before the new one is pasted.
- **Always on Top**, enables the option that the Softphone is always be above any other application.
- **Allow Dialer**, enables the configuration of the Dialer, very useful to make calls automatically. Later we will talk about how to configure the dialer that comes integrated with the Softphone.
- **Open on Windows Startup**, when selecting this option, the softphone starts when Windows starts.
- **Show Ad**, randomly displays an ad on the bottom of the Softphone, in Business Version you can disabled this option.
- **Show CDR History (Days)**, CDR history days that will be displayed when a Call History is selected.
- **Dial Time Out (Seconds)**, permitted duration between dialed digits, the zero value is equivalent to infinity, another value is equivalent to when that time is reached the Softphone will dial the digits entered automatically.
- **Internal Phonebook URL**, URL to import the Internal Phonebook from the PBX (only compatible with VitalPBX)
- **External Phonebook URL**, URL to import the External Phonebook from the PBX (only compatible with VitalPBX)

1.2.3 Agents Settings

In Call Center Options, we must configure the following options:

- Call Center Settings
 - **Login on Startup**, when this option is enabled after starting the Softphone the Agent is automatically logged in to the queue(s).
 - **Logout on Close**, When this option is enabled when the Softphone is closed, the Agent automatically closes the session in the queue (s).
- Server URLs
 - **Pause Reasons**, the URL where the causes of pauses are going to be obtained.
 - **Dialer URL**, Here the URL is configured to synchronize the Dialer Campaign that we have created in VitalPBX. If you are not sure of the server URL press Get.
- PopUp
 - **Incoming Call Command**, each time a call is received, the configured command will be executed.
 - **Outgoing Call Command**, each time a call is made, the configured command will be executed.
 - **Event**, moment in which the configured command is executed.
 - **Arguments**, type of information to be sent as an argument in the command to be executed.

Example

https://www.google.com?s=%1_%2_%3_%4

where:

%1 → the first argument (Caller ID Number)

%2 → the second argument (Caller ID Name)

%3 → the third argument (Extension)

%4 → the four argument (Dial Number, only for outgoing calls)

For Incoming Call, we have three possible arguments, which are in order:

- **CID Number**, the phone number where the call is being received.
- **CID Name**, the name of the owner of the telephone from which the call is being received, sometimes this name comes in the CID Name identifier, however if we have registered this number in our local telephone directory, this name will be replaced by the associate in the Local guide.
- **Extension Number**, the extension number of who is receiving the call.

For Outgoing Call, we have four possible arguments, which are in order:

- **Dial Number**, the full number we are dialing with everything and prefixes.
- **CID Number**, the number with which to identify when we receive a call from this number that we are dialing, this number will only be shown if the number dialed is in the local guide.
- **CID Name**, the name to which the number we are dialing belongs, this name will only be shown if the number dialed is in the local guide.
- **Extension Number**, the extension number that is making the call.

If not all arguments are selected, the order of argument changes depending on the selected ones.

1.2.4 Chat

Chat Settings

Nick Name

Your Mame's Color

Contacts Color

Date Color

Read Date Color

Date-Time Font Size

Message Text Font Size

Show History Days

Chatbook URL

Save Exit

Here you configure the chat interface as well as the Nick Name of the user

- **Nick Name**, Nickname that will be shown in my chat when you sent a message.
- **Your name's color**, the color of my nickname.
- **Contacts Color**, the nickname color of all my contacts.
- **Date Color**, the color of the date and time of the messages.
- **Read Date Color**, the color of the date and time of the messages when they have already been read.
- **Date-Time Font Size**, font size of the date and time of the messages
- **Message Text Font Size**, font size of the messages.
- **Show History (Days)**, message history days that will be displayed when a contact is selected
- **Chatbook URL**, URL to synchronize with VitalPBX contacts.

1.2.5 Email

In Email Settings we configure the email account that we will use to send emails

The screenshot shows the 'Email Settings' dialog box. It includes the following fields and controls:

- Sender Name:** Text input field.
- Sender Email:** Text input field.
- Server Type:** Dropdown menu with 'Gmail' selected.
- Server:** Text input field containing 'smtp.gmail.com'.
- Port:** Text input field containing '465'.
- User:** Text input field.
- Password:** Text input field.
- Subject:** Text input field.
- Body:** Large text area for the email content.
- Test Email:** Text input field with a placeholder: `* {CALLERID_NUMBER},{CALLERID_NAME},{EXTENSION}, {DATE},{TIME}`.
- Buttons:** 'Test', 'Save', and 'Exit' buttons at the bottom.

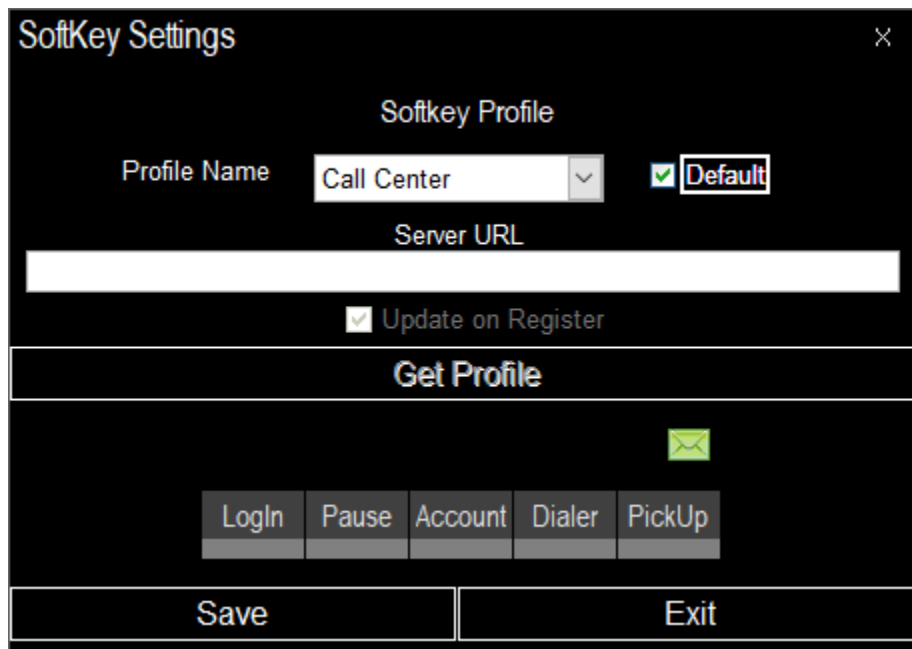
The data to be configured are the following

- **Sender Name**, the name of the person or company that sent the email.
- **Sender Email**, the email of the account owner
- **Server Type**, type of email server to use
 - **Gmail, Recommended**, a Gmail account is used. Remember to update the permissions to allow the sending of external applications by activating it by means of the following command: <https://myaccount.google.com/lesssecureapps> (you must be logged in to your account to activate it)
 - **Other**, an account of another type of server is used
 - **Local, Not Recommended**, the integrated server that brings VitalPBX Communicator is used, when using this option the email to send could fall into the spam tray

- **Server**, name of the server to use, in the case of Gmail we recommend: smtp.gmail.com
- **Port**, port for sending email, in the case of Gmail we recommend port 465
- **User**, user to authenticate in the account, is usually the same email
- **Password**, password to authenticate yourself in the account, it is usually the same as email
- **Subject**, default subject for sending mail, this can be changed at the time of sending an email
- **Body**, content of the email, this may contain variables such as:
 - **{CALLERID_NUMBER}**, last caller id number received
 - **{CALLERID_NAME}**, last caller id name received
 - **{EXTENSION}**, extension number of the email sender
 - **{DATE}**, date of email sending
 - **{TIME}**, email delivery time
- **Test Email**, email to send a test of the configuration

1.2.6 SoftKey

VitalPBX Communicator includes 5 SoftKey. Below we will show the possible values of these SoftKey.



There are 4 predefined Profiles. Three can be modified from the Softphone. One can only be modified in the VitalPBX Server with the VitalPBX Communicator Server module, this is called URL.

When selecting the Profile URL and the option "Update on Register", it will be updated every time the Softphone starts the account.

To configure the Keys it is necessary to press each one of them.

The green envelope is to configure access to voice mail. Although this is configured automatically if the PBX is properly configured.

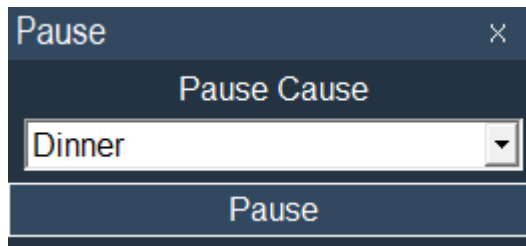
When configuring the 10 SoftKey, the following form will appear.

In SoftKey, we can configure the following options:

- **Key**, key number you are configuring.
- **Type**, the different types of keys are described below:
 - **None**, Key without any configuration.
 - **BLF**, Busy Lamp Field.
 - **Speed Dialing**, Speed Dialing Number.
 - **Record Call**, record call (In case this option is enabled for your softphone by the administrator).
 - **Login/LogOut**, Login to a call queue (If there is a queue of calls and this part is enabled by the administrator).
 - **Login Code**, if we are going to login all queues to which the Agent is registered as a Dynamic member, set ""*50,1", if we are only going to log in a specific queue that is configured ""*52,500,1". The comma (,) means wait one second after dialing the next value. Hints can also be used for this configuration, in the case of VitalPBX the Hints would be QAL_EXT, 1

- **LogOut Code**, if we are going to logout all queues to which the Agent is registered as a Dynamic member, set `"*50,2"`, if we are only going to log in a specific queue that is configured `"*52,500,2"`. The comma (,) means wait one second after dialing the next value. Hints can also be used for this configuration, in the case of VitalPBX the Hints would be `QAL_EXT, 2`
- **Pause/UnPause**, Changes the status of the queue agent to receive calls according to status (Pause, No Pause, Bathroom, Lunch, Rest).
 - **Pause Code**, if we are going to pause all queues to which the Agent is logged in, set `"*51,1"`, if we are only going to pause a specific queue configured `"*53,500,1"`. The comma (,) means wait one second after dialing the next value. Hints can also be used for this configuration, in the case of VitalPBX the Hints would be `QAP_EXT, 1`
 - **UnPause Code**, if we are going to unpause all queues to which the Agent is logged in, set `"*51,2"`, if we are only going to unpause a specific queue configured `"*53,500,2"`. The comma (,) means wait one second after dialing the next value. Hints can also be used for this configuration, in the case of VitalPBX the Hints would be `QAP_EXT, 2`

If the pause causes were configured, the following dialog will appear:

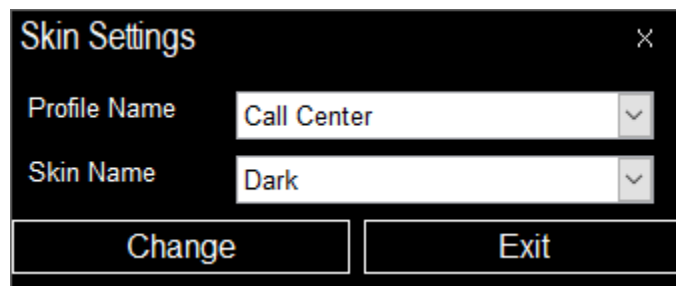


- **Redial**, call the last number dialed. It is also possible to do this action by pressing the Call Button twice.
- **Account**, allows to change accounts. It is also possible to make this action, by pressing twice on the title of the account that is shown on the top of Softphone.
- **Dialer**, it is an integrated automatic dialer that allows to make calls automatically by means of a list in .CSV format notifying some message. If there is a campaign set up this option is enabled, the user can start the Dialer or pause it by just pressing this button.
- **Dialer Pause**, pause the current campaign, by removing the continuous pause where it stopped.
- **Open Form**, reopen the Dialer's PopUp form.
- **Passive Value**, value that is executed when the key is pressed for the first time. If it were a BLF, for example for the do not disturb action, this value would be `DND_EXT` (`EXT` -> Extension). In the cases of Account, Redial, Dialer Record Call and Auto Answer it is left blank.

- **Active Value**, value that is executed when the key has already been pressed. If it were a BLF, for example for the do not disturb action, this value would be DND_EXT (EXT -> Extension). In the cases of Account, Redial, Dialer Record Call and Auto Answer it is left blank.
- **Passive Label**, short text to show in normal state. Maximum 7 characters.
- **Active Label**, short text to show in active state. Maximum 7 characters.
- **ToolTip Title**, generic title of the content of the key.
- **Passive ToolTip**, description to show in normal state.
- **Active ToolTip**, description to show in active state.
- **Color Button**, color of the button to be displayed.
- **Color Font**, text color of the button to be displayed.
- **Tool Tip Text**, more detailed description of the configured number, remember that this text will only be shown when you hover over the key.

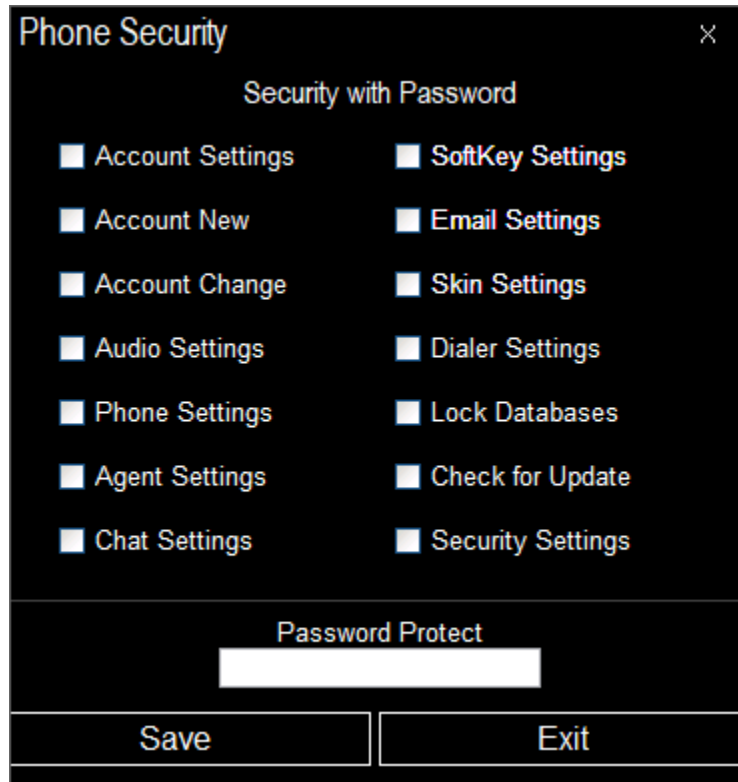
1.2.7 Skin

It is possible to change the skin and the configuration of the Soft keys at any time, for them we must go to the Menu / Settings / Skin and select what we want.



The image shows a 'Skin Settings' dialog box with a dark background. It features a title bar with the text 'Skin Settings' and a close button (X). Below the title bar, there are two dropdown menus. The first is labeled 'Profile Name' and has 'Call Center' selected. The second is labeled 'Skin Name' and has 'Dark' selected. At the bottom of the dialog, there are two buttons: 'Change' and 'Exit'.

1.2.8 Security

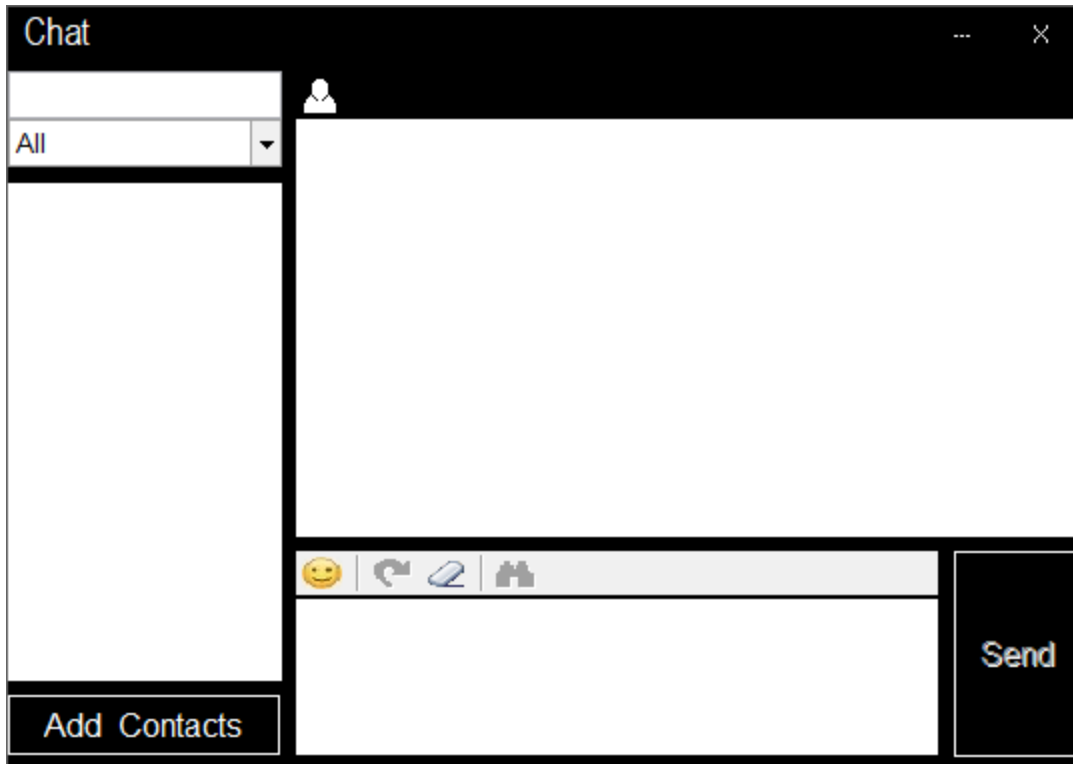


In Security with Password, we can configure the following options:

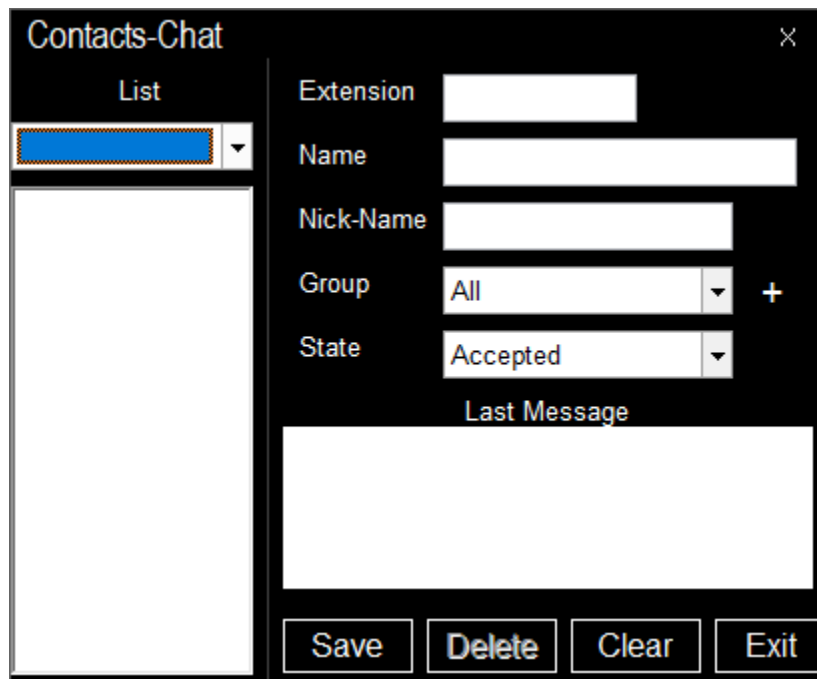
- **Account New**, enables the possibility of creating new accounts.
- **Account Settings**, enables the possibility of modifying the selected account.
- **Account Change**, enables the possibility of changing the account to register.
- **Audio Settings**, enable the ability to configure Audio.
- **Phone Settings**, enable the ability to phone settings.
- **Agent Settings**, configure Agent options for Call Center.
- **Chat Settings**, set Chat options.
- **SoftKey Settings**, set up 5 SoftKey.
- **Skin Settings**, change the Softkey Profile and Phone Skin.
- **Lock Database**, protects databases with a password.
- **Dialer Settings**, enables the option of using the built-in Dialer to create outbound call campaigns.
- **Check for Update**, enable the ability to Check for Update.
- **Security Settings**, limits access to certain Softphone settings.
- **Password**, password to enter the selected options.

1.3 Chat

VitalPBX Communicator includes a Chat system that works on the SIP protocol.



You can add contacts by pressing the Add Contacts button.



The contact options are:

- **Extension**, extension number associated with the contact
- **Name**, name associated with the contact
- **Nick-Name**, short name with which the contact will be identified in the Chat.
- **Group**, group to which the contact belongs.


- **State**, contact status, can be:
 - **Accepted**, contact available for chat.
 - **Request**, contact that you have requested that you accept it. Accept pending.
 - **Block**, blocked contact, all messages received from this contact will be ignored.
- **Last Message**, shows the last message received from this contact.

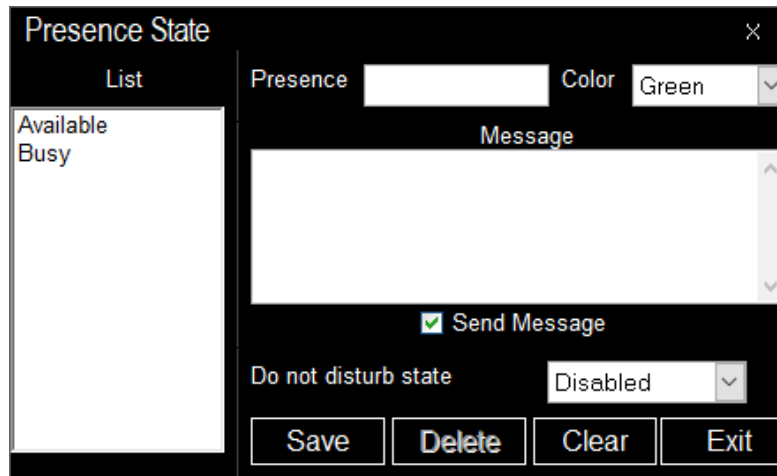
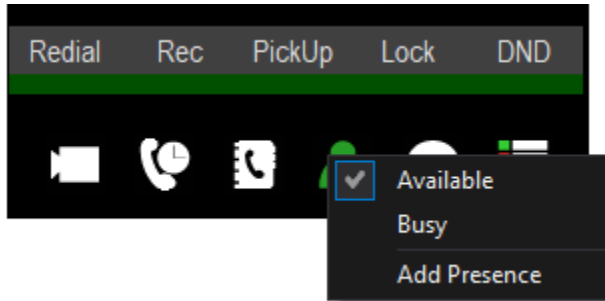
1.4 Presence

VitalPBX Communicator includes Presence, by monitoring the status of contacts. It is also possible to associate a manual presence status by sending a message automatically when we are required through the Chat.

The possible states of the extensions are:

- **Ready**, the extension is available (green icon).
- **Busy**, the extension is busy or in a no-disturb state (red icon).
- **Ring**, the extension is ringing (orange icon).

You can customize presence states associated with messages to send when you receive a chat from a contact. Press  in the softphone for set or add new Presence.



The options are:

- **Presence**, brief description of the state of the presence.
- **Color**, icon color show when this presence is selected.
- **Message**, message to send automatically to the person you want to contact us. This message is sent if "Send Message" is selected.
- **Send Message**, if you want to send the previously configured message to the moment that a person wants to contact us.
- **Do not disturb state**, if it is in Enable when the person configures that Presence will not be able to receive calls.

1.5 Dialer

Local Dialer

VitalPBX Communicator brings a built-in Dialer to make outgoing calls, this dialer speeds dialing of phones that were previously loaded from a CSV file. Each time the Softphone makes a call, a popup appears with a previously configured form where the

customer's information will be displayed, and the Agent can register any comments and catalog if the call is successful or not. Once the campaign is finished, it is possible to obtain the results of the campaign.

In order to have access to the Dialer, two options must be previously configured:

- 1.- Go to Menu/Settings/Phone and enable Allow Dialer.
- 2.- Next we must add a Softkey in Menu/Settings/Softkey and add a Dialer type button.
This is to have the option to enable and disable the Dialer.

In the Dialer, we must configure the following options:

- **Dialer Options**
 - **List Name**, short name to describe the campaign.
 - **Wrap-Up Time**, waiting time between calls. Allows the Agent to do some activity to close the last call.
 - **Close form when saving**, in each call a popup form appears that the Agent must fill, when selecting this option, the form will be closed at the moment of saving the information. This streamlines Agent management.

- **Show form on incoming call**, when there is an incoming call and the Dialer is enabled, search the caller information in the list, if it finds it, display the form.
- **Import CSV file name**,
 - Import File, the CSV file must have the titles in the first line, and can have up to 6 columns besides the phone number, that should always go in the first column. Remember that if it is necessary to dial a prefix such as "9", it must be added to the telephone number before importing the list.
 - 01 – 06, in the first line of the CSV file it is necessary to write the titles, these will look like they do here, you can modify them once the list is loaded.
- **Final Cause**
 - Default, the cause of the end of the call by Default.
 - Description, brief description of the end of the call.
 - Type, type of end of the call, Positive, Negative or Call Later. In the case of Call Later a calendar will appear to reprogram the call.

Dialer Final Causes

Final Cause Profile Default

Default Answer Call Save

Description

Type 1.- Final Positive

Save Delete

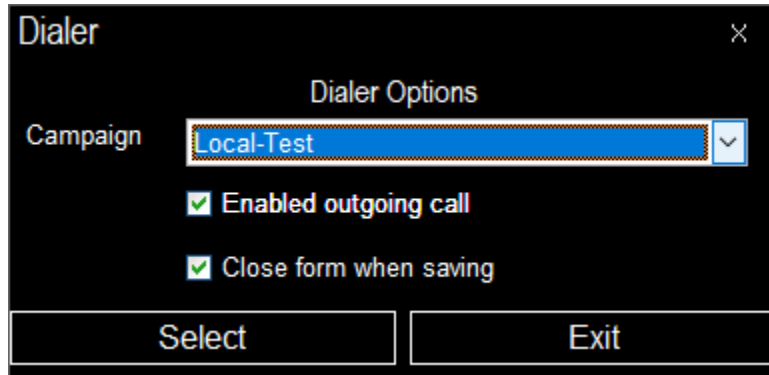
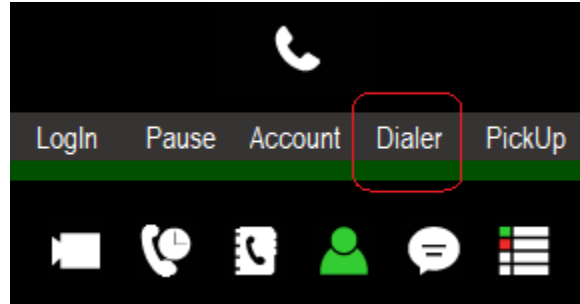
List of Causes

- Answer Call
- Call Later
- Drop Call

Exit

Enable Dialer

In order for the dialer to start making calls it is necessary to select the list to use. For this we press the previously configured Dialer button.



Enabled outgoing call, if we disable this option the Dialer will only display a PopUp when calls are entered.
Will not make outgoing calls

Close form when saving, when the information of the call is saved, the form is closed.

POPUP

The image shows a 'Dialer Form' popup window with a dark background. At the top, it says 'Dialer Form' with a close button (X) on the right. Below this is a section titled 'Customer Information'. It contains several fields: 'Phone' with the value '8404', 'Client ID' with '00002', 'Name' with 'Antonio Montes', 'Company' with 'EBD Honduras', 'Address' with 'Honduras', 'Debt' with '254.25', and 'Due Day' with '18-Jul-19'. To the right of the 'Phone' field is a button labeled 'Remain Contacts: 0'. Below the 'Customer Information' section is a section titled 'Call Result'. It has a 'Final' dropdown menu currently set to 'Answer Call' and a 'Message' text area. At the bottom of the form are two buttons: 'Update' and 'Exit'.

Customer Information	
Phone	8404
Client ID	00002
Name	Antonio Montes
Company	EBD Honduras
Address	Honduras
Debt	254.25
Due Day	18-Jul-19

Call Result	
Final	Answer Call
Message	

Update Exit

If you select an end that is configured with the Call Later option, the next option will appear when you press the Save button. Here you must set the day and time that you will call the contact again.

Call Later ×

Date and Time Information

8404

September 2020

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
36	30	31	1	2	3	4	5
37	6	7	8	9	10	11	12
38	13	14	15	16	17	18	19
39	20	21	22	23	24	25	26
40	27	28	29	30	1	2	3
41	4	5	6	7	8	9	10

Today: 9/3/2020

6:40:16 PM

Save

Remote Dialer

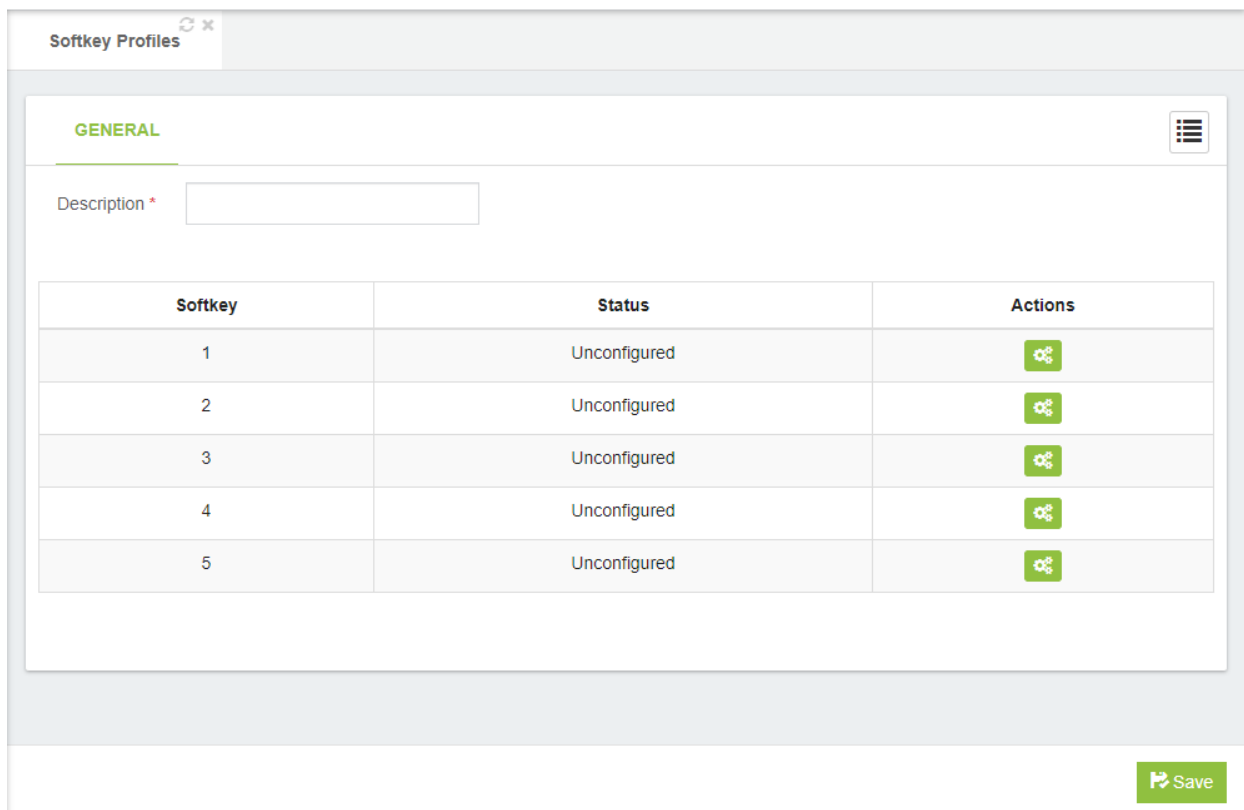
VitalPBX Communicator connects to a list of centralized numbers to dial found in the PBX, for this the Communicator module must be installed. With this module it is possible to centralize the lists, keys and pauses of the agents.

Note:

In order to have access to the Campaigns list, it is necessary that in Settings/Agent you have configured the URL of the VitalPBX server (Section 1.2.3)

Softkey Profiles

In combination with VitalPBX Communicator (Desktop Softphone) centralized profiles are created in the dynamic key PBX and when modified in vitalPBX they affect the Softphone.



The different types of keys it has are:

BLF, supervises an extension or service that has the capacity of BLF in the PBX.

Speed Dialing, it is used to enter numbers that we want to dial by pressing the key

Auto Answer, it has two states, activate the auto answer function or deactivate it

Record Call, key to record call on the same phone

Queues-Agent Login, key to log in to the queues that the extension belongs to, the same key is also used to log out.

Queues-Agent Pause, key to pause the queues belonging to the extension, the same key is also used to remove the pause.

Redial, it is used to call the last number dialed.

Account, it is used to change the softphone registration account, very useful for sharing the same computer with several agents.

Dialer, it is used to activate / deactivate the Dialer campaign.

The screenshot shows a configuration window titled "Softkey 1". It contains the following fields:

- Type: A dropdown menu currently set to "None".
- Description: A text input field.
- Idle Value: A text input field.
- Active Value: A text input field.
- Idle Label: A text input field.
- Active Label: A text input field.
- Idle Title: A text input field.
- Active Title: A text input field.

At the bottom right of the window, there are two buttons: "Close" and "Configure".

Description, main key description.

Idle Value, value that is executed when the key is pressed for the first time. If it were a BLF, for example for the do not disturb action, this value would be DND_EXT (EXT -> Extension). In the cases of Account, Redial, Dialer Record Call and Auto Answer it is left blank

Active value, value that is executed when the key has already been pressed. If it were a BLF, for example for the do not disturb action, this value would be DND_EXT (EXT -> Extension). In the cases of Account, Redial, Dialer Record Call and Auto Answer it is left blank

Idle Label, short text to show in normal state. Maximum 7 characters.

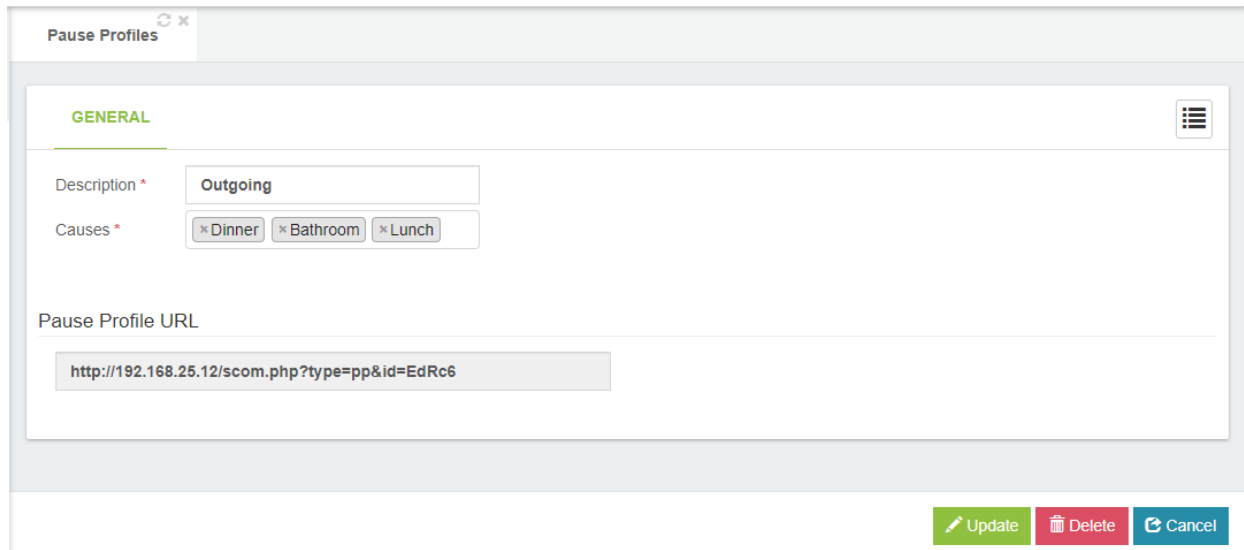
Active Label, short text to show in active state. Maximum 7 characters.

Idle Title, description to show in normal state.

Active Title, description to show in active state.

Pause Profiles

For statistics, the cause of pause of the agents is often necessary, so it is necessary to create pause cause profiles that can be synchronized with VitalPBX Communicator.



The screenshot shows a web interface for configuring a pause profile. At the top, there is a tab labeled "Pause Profiles" with a refresh icon and a close button. Below the tab, the "GENERAL" section is active, indicated by a green underline. The "Description" field contains the text "Outgoing". The "Causes" field contains three tags: "Dinner", "Bathroom", and "Lunch". The "Pause Profile URL" field contains the text "http://192.168.25.12/scom.php?type=pp&id=EdRc6". At the bottom right, there are three buttons: "Update" (green), "Delete" (red), and "Cancel" (blue).

The options to consider are the following,

- Description, brief profile description.
- Causes, allows you to setup different cause of pauses separated by comma.
- Pause Profile URL, URL to retrieve the pause profile settings, this URL is configured in VitalPBX Communicator.

Campaigns Result Profiles

To be able to quantify the result of the campaign it is necessary that each call be assigned a result of it, this is where the results profiles are created.

The screenshot shows a web interface for configuring Campaigns Result Profiles. The title bar reads "Campaigns Result Profiles". The main content area is titled "GENERAL" and contains a "Description *" field with the value "Default". Below this is a "Results" section with a table. The table has two columns: "Result" and "Type". There are three rows of results, each with a delete icon to its right. At the bottom right of the table is an "Add" button. At the bottom of the form are three buttons: "Update", "Delete", and "Cancel".

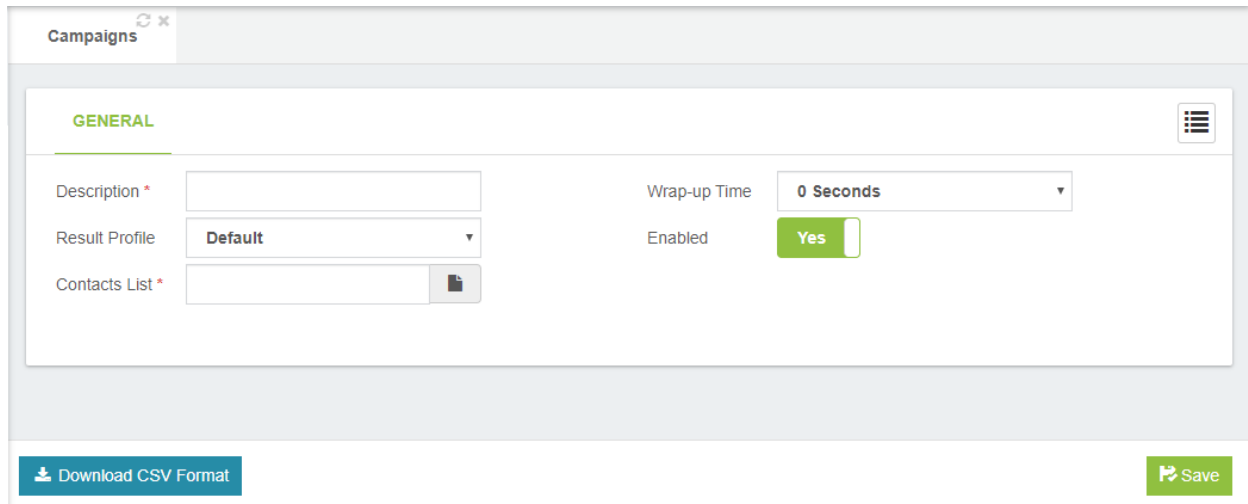
Result	Type
Answered	Positive End
Dropped	Negative End
Call Later	Rescheduled

The options to configure are the following:

- **Description***, brief description to identify this profile.
- **Results**
 - **Result**, brief description of the result of the call.
 - **Type**
 - **Positive End**, it means that the management was successful and that the desired person was contacted.
 - **Negative End**, it means that the management was not successful and that the desired person could not be reached.
 - **Rescheduled**, the call is scheduled to call later or another day.

Campaigns

Now we are going to create the marketing campaign for which it is necessary to fill in the following information.



The screenshot shows the 'Campaigns' configuration page. At the top, there is a 'Campaigns' header with a refresh icon and a close button. Below this is a 'GENERAL' tab. The form contains the following fields and controls:

- Description ***: A text input field.
- Result Profile**: A dropdown menu with 'Default' selected.
- Contacts List ***: A file upload field with a document icon.
- Wrap-up Time**: A dropdown menu with '0 Seconds' selected.
- Enabled**: A toggle switch set to 'Yes'.

At the bottom of the form, there are two buttons: 'Download CSV Format' (with a download icon) and 'Save' (with a save icon).

Description, Short campaign description.

Result Profile, it allows you to select a profile with the available results during a campaign.


Contacts List, a CSV file with the list of contacts to be added on this campaign.

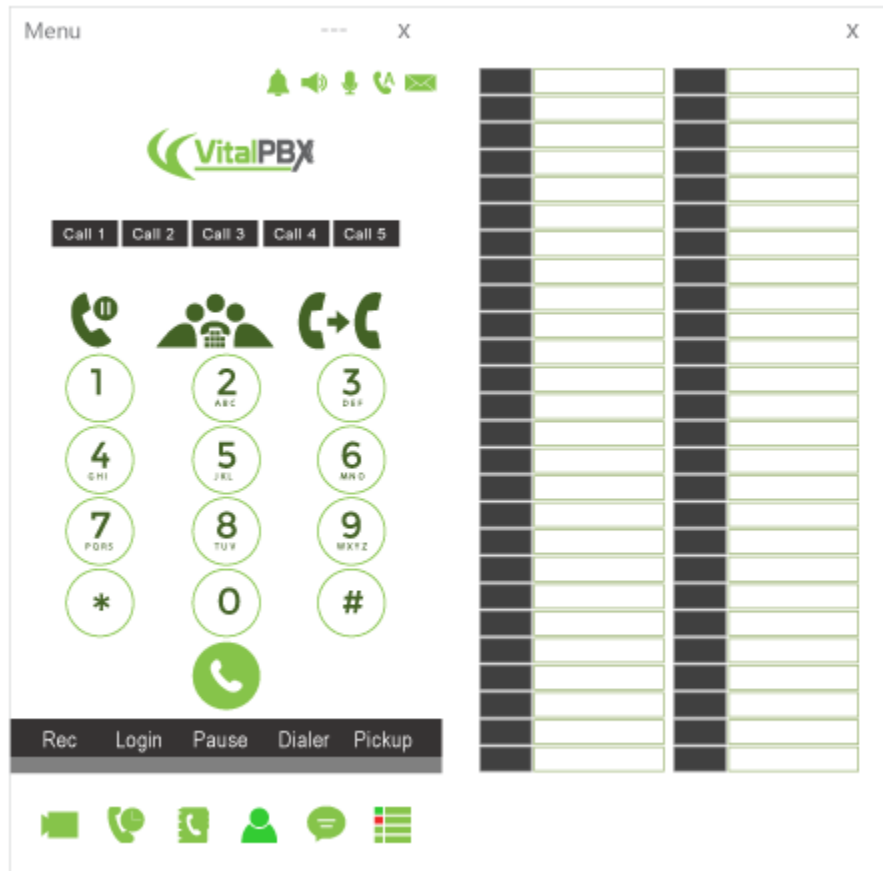
Wrap-up Time, represents the time spent by an agent doing After Call Work (ACW) once they have concluded an interaction.

Enable, if set to no, this campaign will be not listed on communicator softphones.

Download CSV Format, if we want to have a sample of the format of the list to upload in Contacts List press this button.

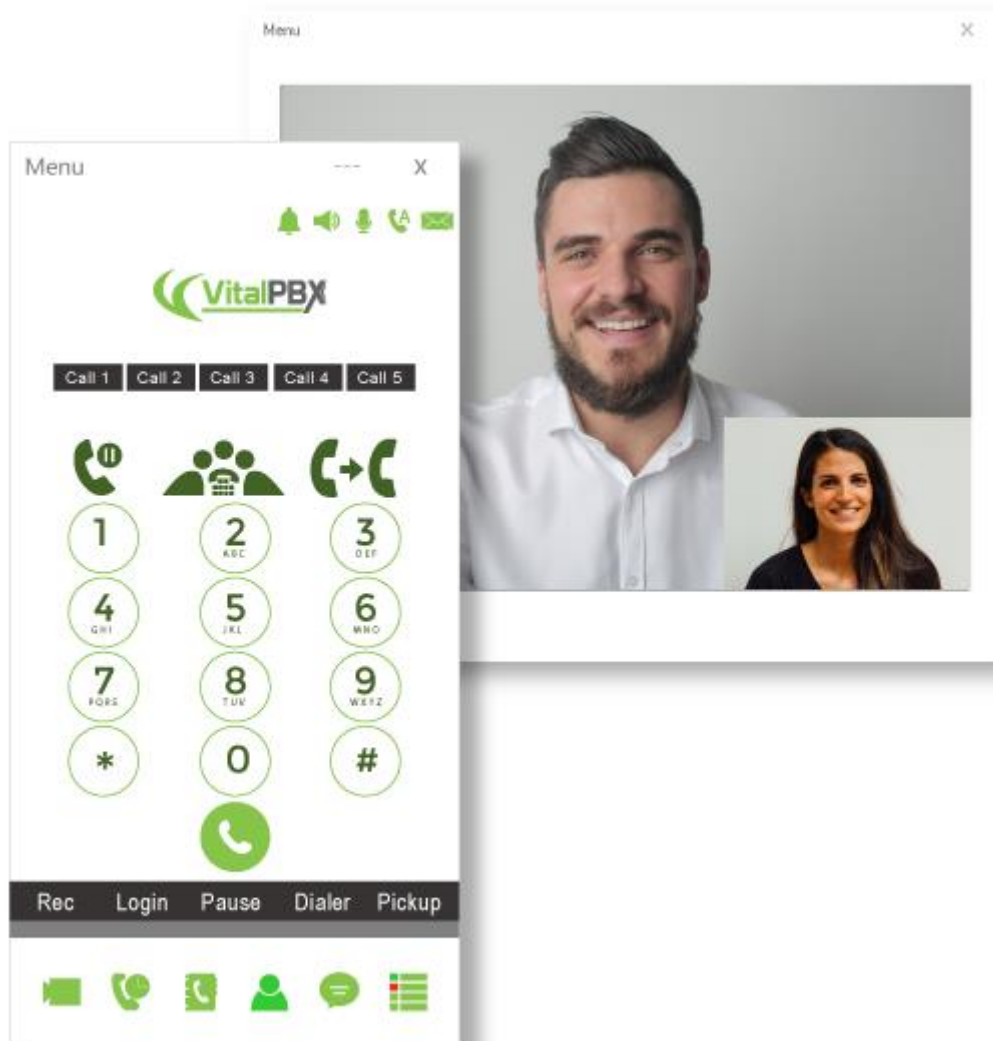
1.6 Console

VitalPBX Communicator integrates a 50-key BFL and Speed Dial console key. You can see it by pressing the  button. To modify or add a number go to Settings menu, tab BLF. You can also configure, send email, send chat message by double clicking on the Label space.





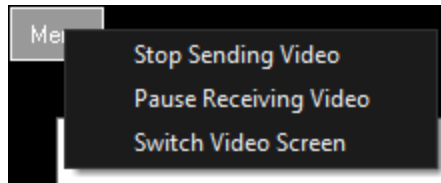
1.7 Video

VitalPBX Communicator includes Video Call. To activate this option, it is necessary to select the Video Camera to be used in the Account configuration.



The available options are:

- Close(), completely closes sending and receiving video.
- Menu(),
 - Stop Video Send, stop sending video.
 - Pause Video Receive, stops video reception.
 - Switch Video Screen, exchange the size of the video received with the one sent.
 - HangUp, ends the video call.



1.8 Call History

History displays the last calls received or made.

The screenshot shows a window titled 'Call History' with a close button (X) in the top right corner. The window contains a table with three columns: 'Phone', 'Name', and 'Date/Hour'. There are five rows of call records, all from the phone number 8404. Each row has a blue arrow icon to the left of the phone number. At the bottom of the window is a black bar with the word 'Exit' in white text.

Phone	Name	Date/Hour
8404		2020/09/03-17:40:18
8404		2020/09/03-17:36:27
8404		2020/09/03-17:33:20
8404		2020/09/03-17:26:45
8404		2020/09/03-17:25:21

Double click on the record to call the number.


1.9 Directory

VitalPBX Communicator integrates a Directory which can be consulted by phone or name. This directory is also useful for identifying the most common incoming calls.



Dial Number	Name	CallerID Number
8250	Recepcion	8250
8251	Ventas	8251
8252	Ventas 2	8252
8253	Contabilidad	8253
8254	Maria Atha	8254
8257	Sala Conferencia	8257
8267	Cabina Telefonica	8267
8270	Jose Miguel	8270
8303	Violeta Mercado	8303
8255	Rodrigo Cuadra	8255
8601	Yassier Bonilla	8601
8603	Emanuel Lyons Iphone	8603
8604	Emanuel Lyons Des...	8604
8261	Oscar Softphone	8261
8606	Neftali Delgado	8606
8355	Rodrigo Cuadra Wifi	8355
8271	Maynor Peralta	8271
8700	Casa	8700
8605	Emanuel Lyons Hou...	8605
8607	Emanuel Lyons Vide...	8607
8260	Oscar Romero	8260
8256	Conferencia	8256
8608	Emanuel Lyons-EI V...	8608

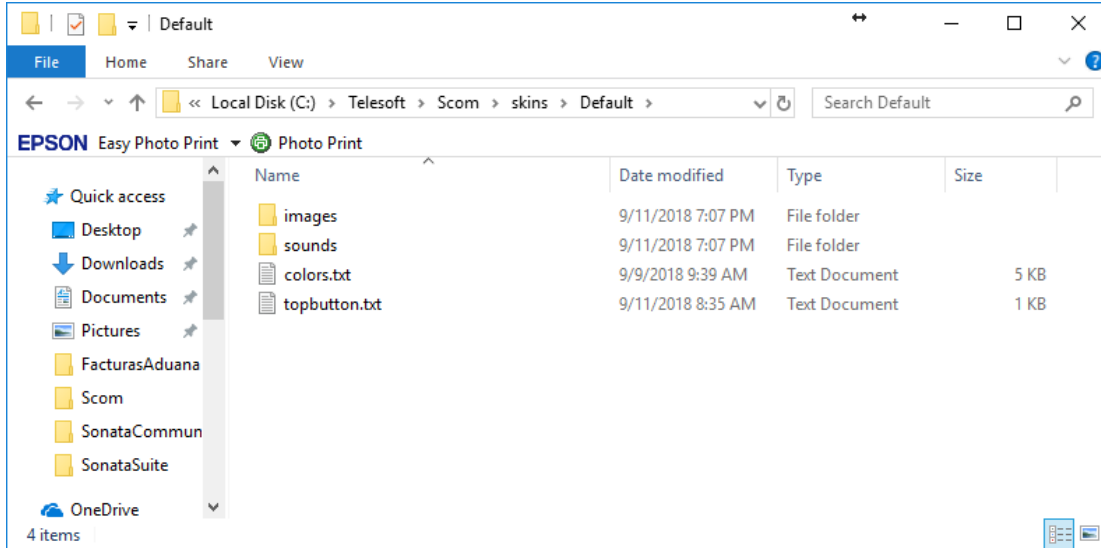
In Directory, we must configure the following options:

- Search Space, search for a contact, it can be a phone number, name or last name.
- Category, filter by Category.
- Add/Edit Contacts, by pressing the + button (), you can edit or add new contacts.
- Phone, phone to include in the directory.
- Name, name associated with the phone. When we receive a call from this phone on the display of the Softphone will appear this name.
- Prefix, output prefix to call this phone, generally "9" or "0" is used.

1.10 Skin

1.10.1 Skin Structure

Next, we will show how the structure of a Skin is configured.



Images Folder, all the images associated with the Softphone skin are located here.

Sounds Folder, all the audios that the Softphone uses are located here

Colors file, colors.txt file where the colors of the Softphone Titles and Buttons are configured.







Top button file, in topbutton.txt the position and size of the buttons on the top of the Softphone are configured.

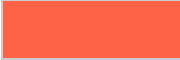
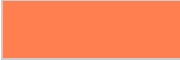













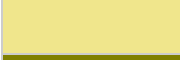













1.10.2 Color Guide






Basic colors:









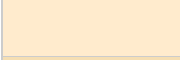
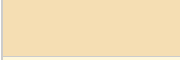

















Color	HTML / CSS Name	Hex Code #RRGGBB
	Black	#000000
	White	#FFFFFF
	Red	#FF0000
	Lime	#00FF00
	Blue	#0000FF
	Yellow	#FFFF00
	Cyan / Aqua	#00FFFF
	Magenta / Fuchsia	#FF00FF
	Silver	#C0C0C0
	Gray	#808080
	Maroon	#800000
	Olive	#808000
	Green	#008000
	Purple	#800080
	Teal	#008080
	Navy	#000080

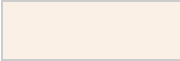


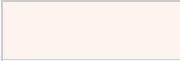



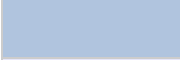

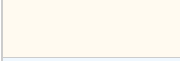









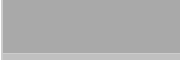
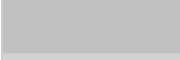
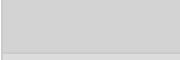
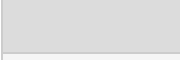
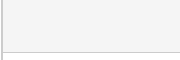

Color	Color Name	Hex Code #RRGGBB
	maroon	#800000
	dark red	#8B0000
	brown	#A52A2A
	firebrick	#B22222
	crimson	#DC143C
	red	#FF0000

Color	Color Name	Hex Code #RRGGBB
	tomato	#FF6347
	coral	#FF7F50
	indian red	#CD5C5C
	light coral	#F08080
	dark salmon	#E9967A
	salmon	#FA8072
	light salmon	#FFA07A
	orange red	#FF4500
	dark orange	#FF8C00
	orange	#FFA500
	gold	#FFD700
	dark golden rod	#B8860B
	golden rod	#DAA520
	pale golden rod	#EEE8AA
	dark khaki	#BDB76B
	khaki	#F0E68C
	olive	#808000
	yellow	#FFFF00
	yellow green	#9ACD32
	dark olive green	#556B2F
	olive drab	#6B8E23
	lawn green	#7CFC00
	chart reuse	#7FFF00
	green yellow	#ADFF2F
	dark green	#006400
	green	#008000
	forest green	#228B22

Color	Color Name	Hex Code #RRGGBB
	lime	#00FF00
	lime green	#32CD32
	light green	#90EE90
	pale green	#98FB98
	dark sea green	#8FBC8F
	medium spring green	#00FA9A
	spring green	#00FF7F
	sea green	#2E8B57
	medium aqua marine	#66CDAA
	medium sea green	#3CB371
	light sea green	#20B2AA
	dark slate gray	#2F4F4F
	teal	#008080
	dark cyan	#008B8B
	aqua	#00FFFF
	cyan	#00FFFF
	light cyan	#E0FFFF
	dark turquoise	#00CED1
	turquoise	#40E0D0
	medium turquoise	#48D1CC
	pale turquoise	#AFEEEE
	aqua marine	#7FFFD4
	powder blue	#B0E0E6
	cadet blue	#5F9EA0
	steel blue	#4682B4
	corn flower blue	#6495ED
	deep sky blue	#00BFFF

Color	Color Name	Hex Code #RRGGBB
	dodger blue	#1E90FF
	light blue	#ADD8E6
	sky blue	#87CEEB
	light sky blue	#87CEFA
	midnight blue	#191970
	navy	#000080
	dark blue	#00008B
	medium blue	#0000CD
	blue	#0000FF
	royal blue	#4169E1
	blue violet	#8A2BE2
	indigo	#4B0082
	dark slate blue	#483D8B
	slate blue	#6A5ACD
	medium slate blue	#7B68EE
	medium purple	#9370DB
	dark magenta	#8B008B
	dark violet	#9400D3
	dark orchid	#9932CC
	medium orchid	#BA55D3
	purple	#800080
	thistle	#D8BFD8
	plum	#DDA0DD
	violet	#EE82EE
	magenta / fuchsia	#FF00FF
	orchid	#DA70D6
	medium violet red	#C71585

Color	Color Name	Hex Code #RRGGBB
	pale violet red	#DB7093
	deep pink	#FF1493
	hot pink	#FF69B4
	light pink	#FFB6C1
	pink	#FFC0CB
	antique white	#FAEBD7
	beige	#F5F5DC
	bisque	#FFE4C4
	blanched almond	#FFEBCD
	wheat	#F5DEB3
	corn silk	#FFF8DC
	lemon chiffon	#FFFACD
	light golden rod yellow	#FAFAD2
	light yellow	#FFFFE0
	saddle brown	#8B4513
	sienna	#A0522D
	chocolate	#D2691E
	peru	#CD853F
	sandy brown	#F4A460
	burly wood	#DEB887
	tan	#D2B48C
	rosy brown	#BC8F8F
	moccasin	#FFE4B5
	navajo white	#FFDEAD
	peach puff	#FFDAB9
	misty rose	#FFE4E1
	lavender blush	#FFF0F5

Color	Color Name	Hex Code #RRGGBB
	linen	#FAF0E6
	old lace	#FDF5E6
	papaya whip	#FFEFD5
	sea shell	#FFF5EE
	mint cream	#F5FFFA
	slate gray	#708090
	light slate gray	#778899
	light steel blue	#B0C4DE
	lavender	#E6E6FA
	floral white	#FFFAF0
	alice blue	#F0F8FF
	ghost white	#F8F8FF
	honeydew	#F0FFF0
	ivory	#FFFFFF0
	azure	#F0FFFF
	snow	#FFFAFA
	black	#000000
	dim gray / dim grey	#696969
	gray / grey	#808080
	dark gray / dark grey	#A9A9A9
	silver	#C0C0C0
	light gray / light grey	#D3D3D3
	gainsboro	#DCDCDC
	white smoke	#F5F5F5
	white	#FFFFFF

1.10.3 Hints (BLF)

Name	Dial	Description
DND_EXT	*66	DND (Do not disturb)
LOK_EXT	*75	Phone Lock
CFN_EXT	*64	Call Forward No Answer
CFU_EXT	*60	Call forward not available
CFI_EXT	*58	Immediate call forwarding
CFB_EXT	*62	Call Forward Busy
FWM_EXT	*67	Follow me
PEA_EXT	*96	Personal assistant
BOSS_EXT	*36	Boss/Secretary
QAL_EXT	*50	Login/Logout Agent (all dynamic queues to which it belongs)
QAP_EXT	*51	Agent Pause/UnPause (all dynamic queues to which it belongs)
QAL_EXT_QUEUE	*52	Login/Logout agent in a specific queue
QAP_EXT_QUEUE	*53	Agent Pause/UnPause in a specific queue
Vm_EXT		Monitors voicemail status and by pressing it checks voicemail.
TC-#		It monitors the status of the Time Conditions, whether it is reversed temporarily or permanently, however, it will only allow us to change the status of the Time Condition from the phone if said status is temporary and not permanent. # -> ID
NM-#		Monitors night mode, # -> ID, Pressing forces the state to change permanently until pressed again.
	*69	Clean all call diversions
701-710		Default parking lots
		Notes: EXT → Extension, QUEUE → Queue Number