

vitalpbx.com

 **SonataSuite**
Dialer



 **VitalPBX**

Have an efficient way for faster
and more organized communication

CONTENT

Content

INTRODUCTION	3
BETA TESTER	3
SONATA DIALER	4
1.- INSTALLATION	4
2.- MENÚ	8
3.- DASHBOARD	10
4.- CAMPAIGNS	11
4.1.- Forms.....	12
4.2.- Disposition Groups	13
4.3.- Contact Lists	14
4.4.- Queues	15
4.5.- Campaigns.....	16
5.- REPORTS.....	18
5.1.- Agents Report.....	18
5.2.- Dispositions Reports	20
5.3.- Calls By Agent.....	21
6.- USERS	22
6.1.- Users.....	22
6.2.- Pause Profiles	23
6.3.-Roles.....	24
6.4.- System Permission.....	25
7.- SETTINGS	26
7.1.- General Settings	26
7.2.- ICE Servers	27
7.3.- PBX Settings	28
8.- AGENT CONSOLE	29
A.- TECHNICAL SPECIFICATIONS.....	31

Introduction

Sonata Suite is a group of applications that integrate with VitalPBX. Below is a list of the applications available in Sonata Suite:

- Switchboard
- Call Accounting System
- Recording Management System
- Call Center Reports (Stats)
- **Dialer**

Beta Tester

To install the beta version of Sonata Dialer you must add the beta repository, for which you must go to and follow the instructions:

<https://github.com/VitalPBX/vitalpbx-cr-repo>

Then enter the console and execute the following commands:

```
[root@vitalpbx ~]# yum clean all  
[root@vitalpbx ~]# yum install sonata-dialer
```

Sonata Dialer

Sonata Dialer is an application that allows you to make calls automatically.

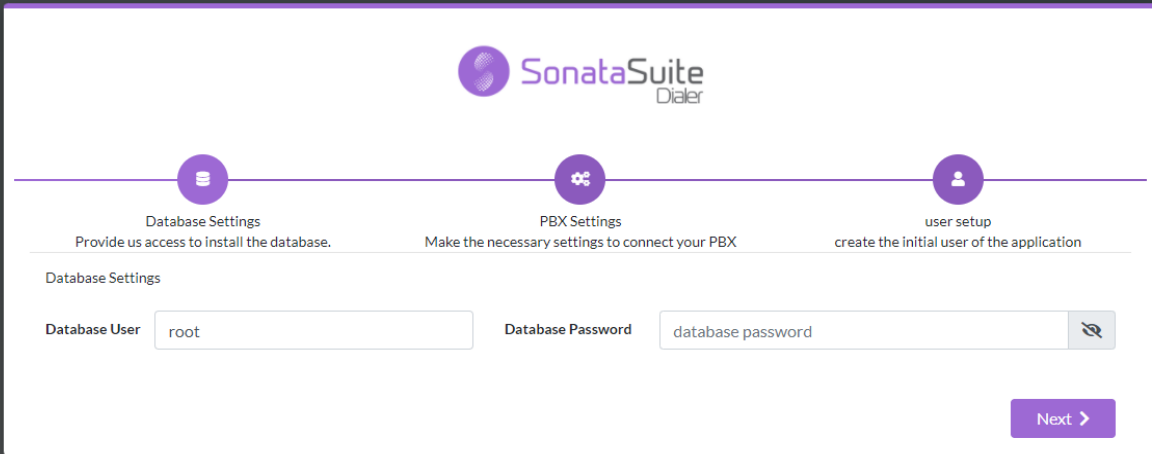
1.- Installation

Sonata Dialer only works with VitalPBX 3.0 onwards. To install Sonata Dialer, it is necessary to go to Add-ons in VitalPBX, search in the list and press the Install button and wait a few minutes, once the installation is finished, we must go to the url pressing the Addon called Sonata Dialer.

Now a wizard will be displayed to guide us to finalize the configuration.

a.- Database Settings:

- **Database User**, MySQL user, if we are on the same server, you can leave the root user without password, otherwise you must create a user in Mariadb to access remotely.
- **Database Password**, if we are on the same server the root user usually does not have a password, if we are accessing remotely the user and password must be created in Mariadb.



The screenshot shows the Sonata Suite Dialer installation wizard. At the top, the logo "Sonata Suite Dialer" is displayed. Below the logo, there is a progress bar with three steps: "Database Settings" (selected), "PBX Settings", and "user setup". Under "Database Settings", the instruction reads "Provide us access to install the database." Below this, there are two input fields: "Database User" with the value "root" and "Database Password" with the value "database password". A "Next >" button is located at the bottom right of the form.

b.- PBX Settings:

- **Host**, if installed on the same server it is advisable to write **localhost** otherwise, we must write the host or remote IP.
- **Port**, if our server has a valid certificate and all requests are redirected to https, we should configure port 443 and we do not have https configure port 80. If we are going to access remotely remember to open these ports in the firewall.
- **App key**, If Sonata Dialer is in the same server as VitalPBX it is not necessary to configure the API Key since it is obtained automatically. If Sonata Dialer is installed in a different server than VitalPBX it is necessary to create an App Key in VitalPBX to be able to connect, for which we go to the menu of VitalPBX, ADMIN/Admin/Application Keys, create a new one, copy it and write it here.
- **Secure**, indicates a secure https connection, usually port 443 is used when this option is selected.

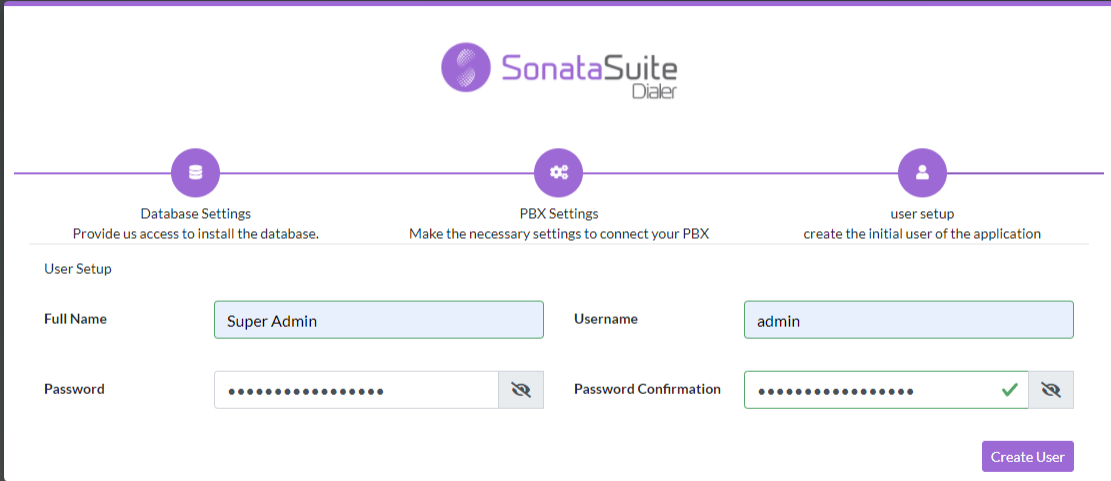
The screenshot shows the 'PBX Settings' configuration page in the SonataSuite Dialer interface. At the top, the SonataSuite Dialer logo is displayed. Below the logo, a progress bar indicates three steps: 'Database Settings' (Provide us access to install the database.), 'PBX Settings' (Make the necessary settings to connect your PBX), and 'user setup' (create the initial user of the application). The 'PBX Settings' section is active and contains the following fields:

- Host**: A text input field containing 'localhost' with a green checkmark icon to its right.
- Port**: A text input field containing '443'.
- App Key**: A text input field containing 'application key' with a refresh icon and a lock icon to its right. Below this field is a note: 'required when the application is installed on a server separate from your PBX.' with an information icon.
- Secure**: A toggle switch that is currently turned on (purple).

At the bottom right of the form, there are two buttons: a red button labeled '< previous' and a purple button labeled 'next >'.

c.- User Settings

- **Full Name**, full name of the System Administrator.
- **Username**, system administrator user, usually admin.
- **Password**, password for administrator access.
- **Password Confirmation**, password confirmation administrator.

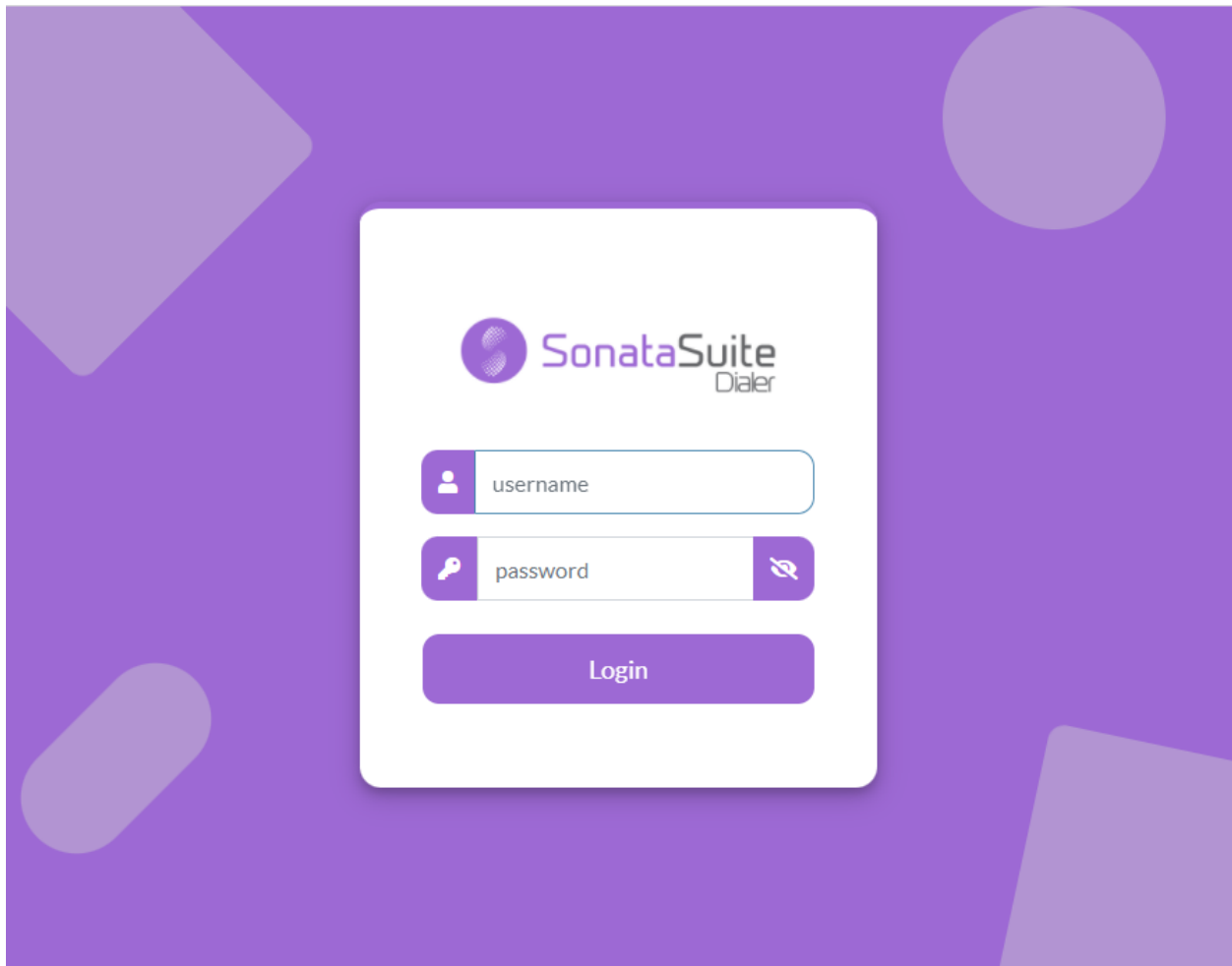


The screenshot displays the 'User Setup' screen in the SonataSuite Dialer application. At the top, the SonataSuite Dialer logo is centered. Below the logo is a progress bar with three steps: 'Database Settings' (Provide us access to install the database.), 'PBX Settings' (Make the necessary settings to connect your PBX), and 'user setup' (create the initial user of the application). The 'user setup' step is currently active. The form contains the following fields:

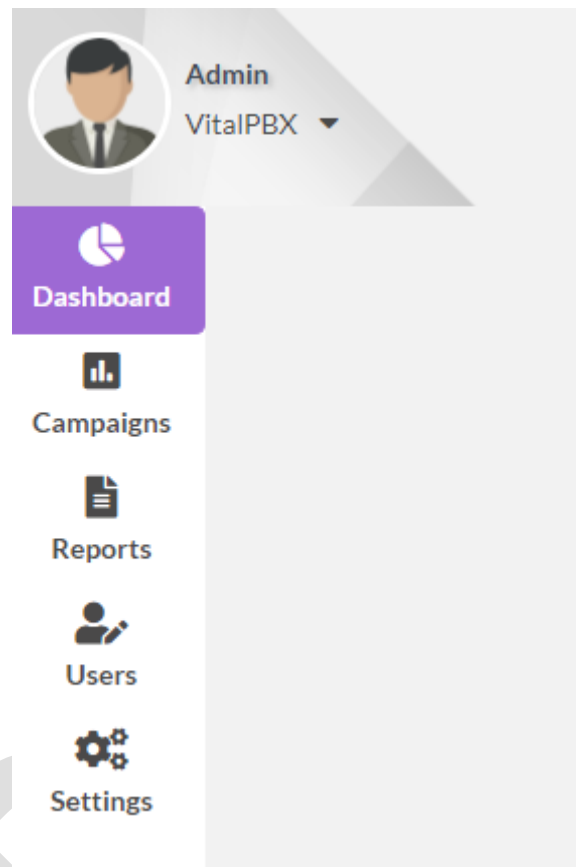
Field	Value
Full Name	Super Admin
Username	admin
Password
Password Confirmation ✓

A 'Create User' button is located at the bottom right of the form.

d.- Log in with the user and password previously created.



2.- Menu



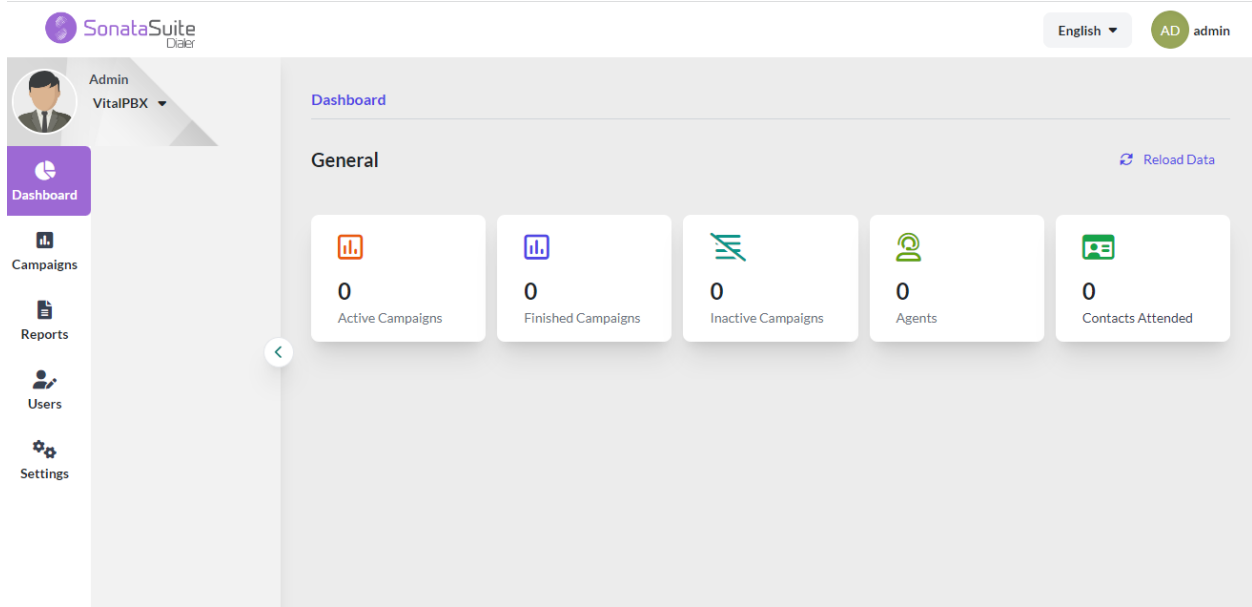
In the menu we have the following options:

- **Dashboard**, here we will be able to see the campaigns and active agents, as well as contacts attended, etc.
- **Campaigns**, here the campaigns are completely configured, this menu has the following options:
 - **Campaigns**, although it is the last option to configure, it is where the campaign is assembled with all the previously configured data.
 - **Contact Lists**, here we load the list of contacts to be used in the campaign, it allows CSV, XLS or XLSX formats.
 - **Disposition Groups**, the layout groups are configured, i.e. the result to be selected by the agent at the end of the call.
 - **Form**, the form to be used in each campaign is created. This form is to fill out additional information related to each call.
 - **Queues**, in order to keep statistics and to be able to assign agents to each company, it is necessary to create call queues, these queues are associated to the agents.
- **Reports**, Reports by Agent, Dispositions and Call by Agent.
 - **Agents Report**, it is possible to generate reports on the activity of each agent within a campaign.

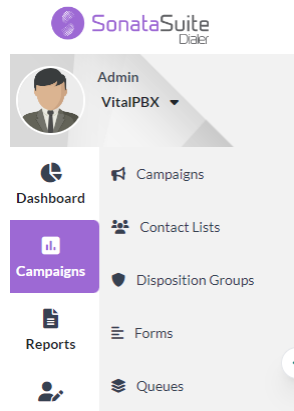
- **Dispositions**, it is possible to see the overall result of each campaign by layout.
- **Call By Agent**, shows the details of each Agent's calls.
- **Users**, here we create the system users with their respective privileges.
 - **Users**, create the users and associate them to the Role and Agent Profile, as well as to an extension.
 - **Pause Profiles**, we create the pause causes which we are going to relate to the user.
 - **Roles**, we create the role that gives us access to each module of the App.
 - **System Permissions**, we associate the Agents with queues and campaigns.
- **Settings**, in this section the following parameters are configured.
 - **General Settings**, configure the App's time zone.
 - **Ice Server**, as the App has the possibility to work with Softphone integrated with WebRTC technology, it is sometimes necessary to define STUN servers.
 - **PBX Settings**, this form configures the connection with the host from which we are going to extract the information to be displayed.

3.- Dashboard

In the Dashboard we show the campaigns and Agents as well as the total number of contacts served.



4.- Campaigns



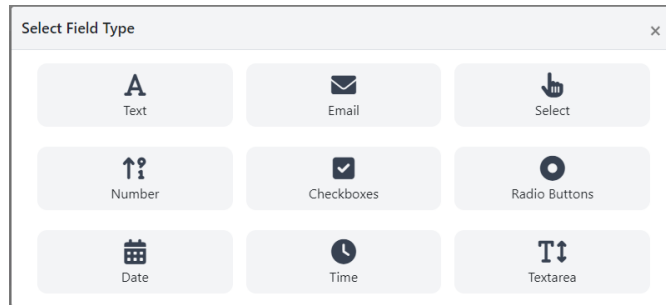
To create a campaign, the following must be considered:

1. **Contact Lists**, is the list of contacts to call, a single list can be created and used in multiple campaigns.
2. **Disposition Groups**, very important since the groups are created to typify the result of each call.
3. **Form**, a form is created where additional data can be associated to the data imported in the Contact List.
4. **Queues**, in order to store event history for each agent it is necessary to create queues, and these are associated to the campaign.

Here is the most logical order to create a campaign from scratch.

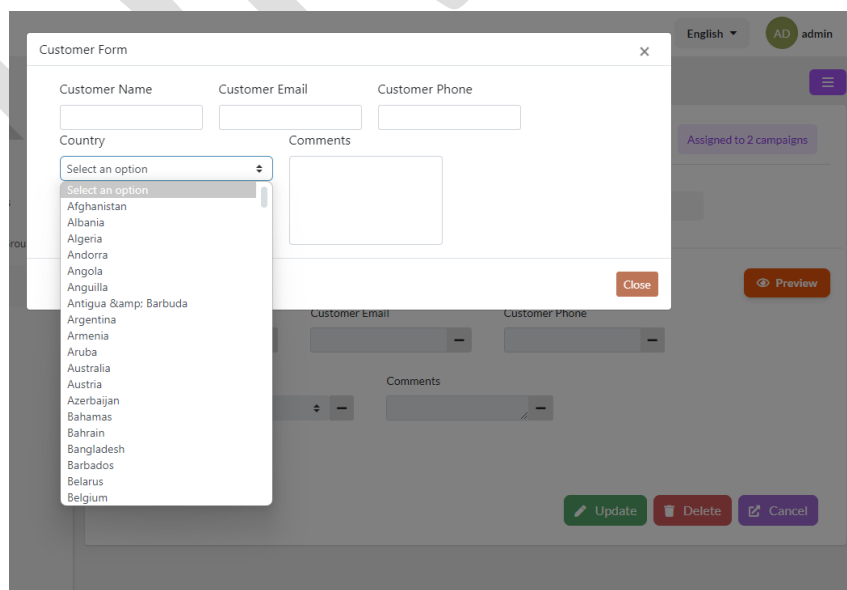
4.1.- Forms

To create the form, go to Campaigns/Form. You can create forms with the following types of fields:



- **Text**, accepts any type of text.
- **Email**, only accepts valid emails.
- **Select**, shows multiple selections. They come predefined:
 - **Country**, list of all countries in the world.
 - **US States**, list of all U.S. states.
 - **Gender**, male, female.
 - **Months of the year**, months of the year.
 - **Days of the week**, days of the week.
- **Number**, accepts only numbers.
- **Checkboxes**, accepts only true or false.
- **Radio Buttons**, accepts only one selection.
- **Date**, accepts only date format.
- **Time**, accepts only time format.
- **Textarea**, like Text with the difference that it accepts multiple lines.

All fields are read-only and required, which is optional when creating the field in the form.



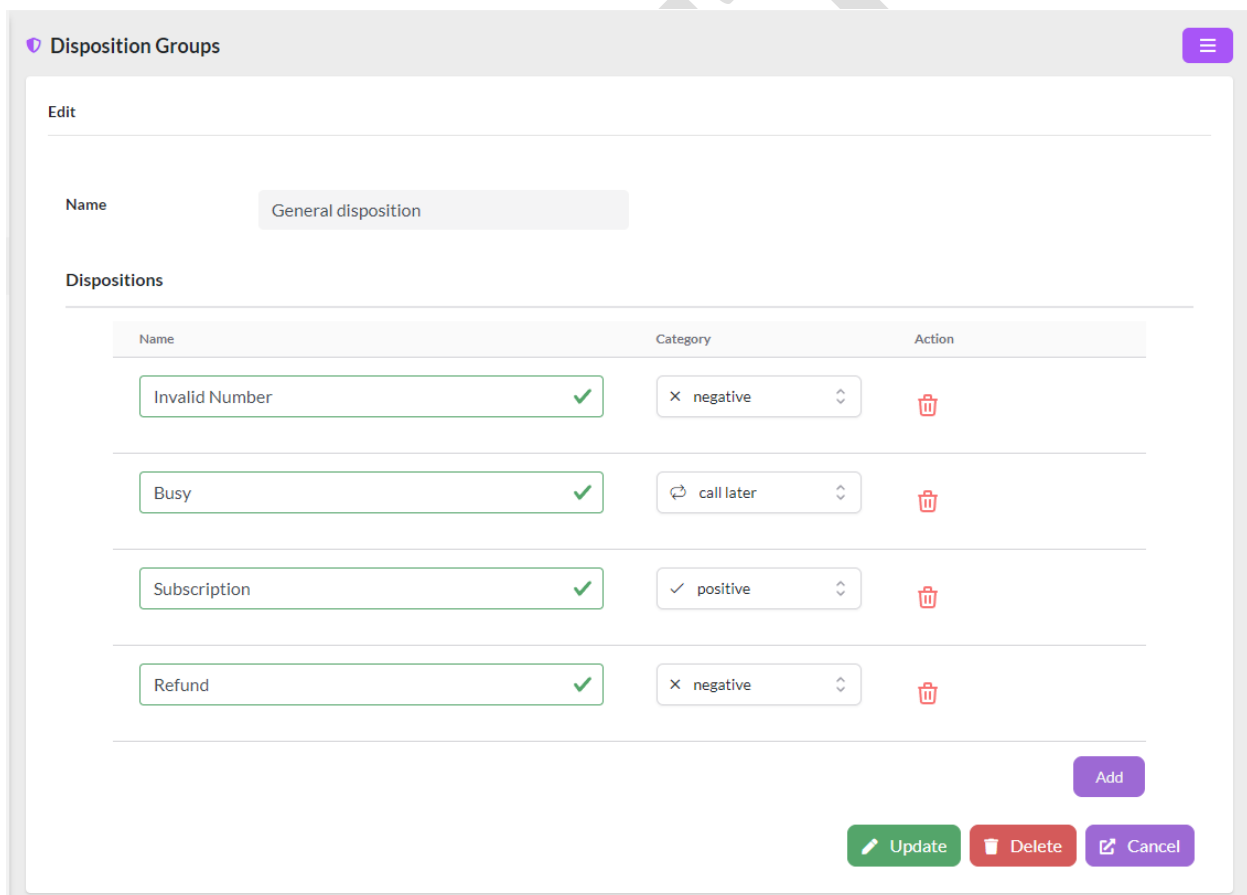
4.2.- Disposition Groups

The disposition groups help us to catalog the result of the call in an easy and fast way, it is part of the form that is shown to the agent when he/she is on the call.

To create a disposition group, go to Campaigns/Disposition Groups.
The default layout categories are:

- **Negative**, can be associated when the call did not give the expected result.
- **Positive**, can be associated when the call gave the expected result.
- **Call Later**, can be associated when the contact person told us to call you back.

The following is an example configuration:



Disposition Groups

Edit

Name: General disposition

Dispositions

Name	Category	Action
Invalid Number ✓	× negative	🗑️
Busy ✓	🔄 call later	🗑️
Subscription ✓	✓ positive	🗑️
Refund ✓	× negative	🗑️

[Add](#)

[Update](#) [Delete](#) [Cancel](#)

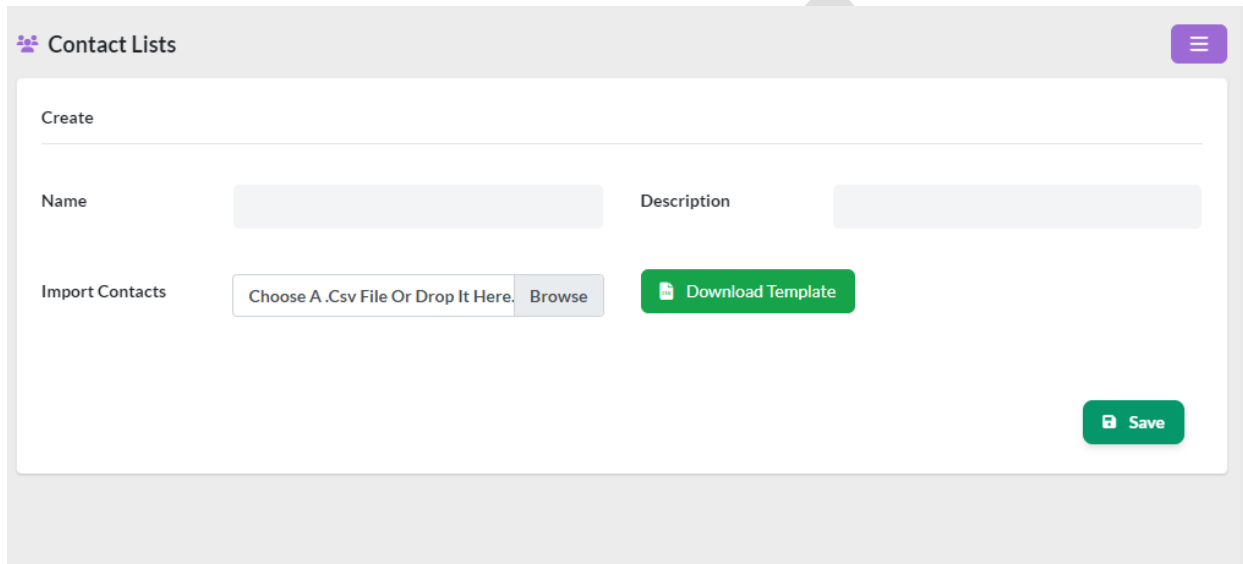
4.3.- Contact Lists

To complete what is necessary to create a campaign, the list of numbers to be called must be created, it is in this module that these numbers are added.

To create lists, go to Campaigns/Contacts Lists. The following formats are supported:

- CSV

And the headers must be included in the first line of the form since they will indicate the content of each field. You can add up to 3 telephone numbers in a list.

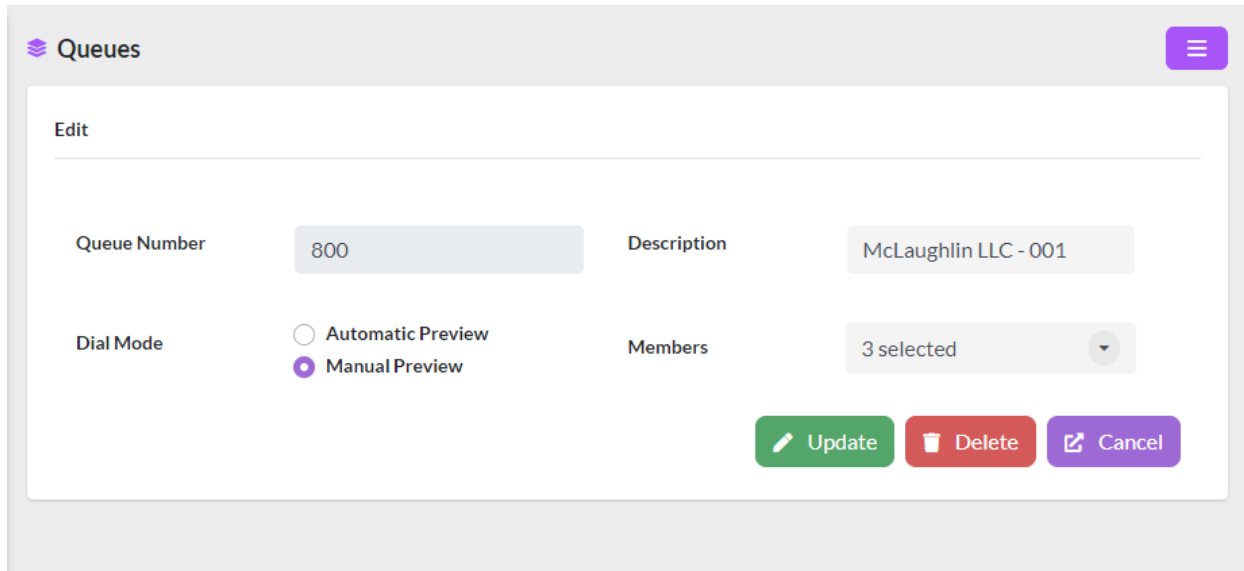


The screenshot shows the 'Contact Lists' form in the Sonata Dialer interface. The form is titled 'Contact Lists' and has a 'Create' section. It includes two input fields: 'Name' and 'Description'. Below these fields, there is an 'Import Contacts' section with a text input field containing 'Choose A .Csv File Or Drop It Here.', a 'Browse' button, and a green 'Download Template' button. A green 'Save' button is located at the bottom right of the form.

4.4.- Queues

In queues where the Agents that are going to manage one or more campaigns are assigned. The type of campaign is also defined.

To configure Queues, go to Campaigns/Queues:



The screenshot shows the 'Queues' configuration interface. The form includes the following fields and controls:

- Queue Number:** 800
- Description:** McLaughlin LLC - 001
- Dial Mode:** Automatic Preview, Manual Preview
- Members:** 3 selected

At the bottom right, there are three buttons: **Update** (green), **Delete** (red), and **Cancel** (purple).

The data to be configured are as follows:

- **Queue Number**, number under which all the events in the queue will be logged.
- **Description**, brief description.
- **Dial Mode**
 - **Automatic Preview**, dialing displays the contact to the Agent and a few seconds later dials the number automatically.
 - **Manuel Preview**, the dialer displays the contact to the Agent and when the Agent is ready presses a button to place the call.
- **Members**, are the Agents that are going to belong to the queue. These agents should have had their extensions created previously in Users/Users.

4.5.- Campaigns

In this module is where the campaign is configured, it is very important that before configuring the campaign you have the following prepared:

- **Forms**, have created the form.
- **Disposition Groups**, have created at least one disposition group.
- **Contacts Lists**, you have imported at least one contact list.
- **Queues**, have created at least one queue with the Agents who will manage the campaign.

Once these 4 requirements are fulfilled, go to Campaigns/Campaigns and the following form will be displayed:

The screenshot shows the 'Create' form for a campaign. The fields are arranged in a grid-like fashion. The 'Queue' field has a dropdown menu with 'queue' selected and a 'Create Queue' button below it. The 'Contact List' field has a dropdown menu with 'contact list' selected and a 'Create Contact List' button below it. The 'Form' field has a dropdown menu with 'form' selected and a 'Create Form' button below it. The 'Dispositions Group' field has a dropdown menu with 'select' selected and a 'Create' button below it. The 'Active On Create' field is a toggle switch that is currently turned off. The 'Script' field is a rich text editor with a toolbar and a 'Save' button at the bottom right.

The data to be configured are as follows:

- **Name**, short name to identify the campaign.
- **Queue**, queue to which the campaign will be related. In this queue are the agents that belong to the campaign, as well as the type of marking.
- **Start Date**, campaign start day.
- **End Date**, end date of the campaign.
- **Start Shift Time**, campaign start time.
- **Shift End Time**, end time of the campaign.
- **Contact List**, list of contacts associated with the campaign.
- **Form**, form associated with the campaign.
- **Dispositions Group**, campaign partner disposition group.
- **Weight**, campaign weight, e.g., if an Agent manages two campaigns at the same time:
 - Campaign A, weight: 20

- Campaign B, weight: 40

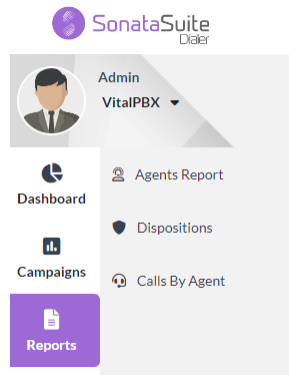
It means that for every 20 contacts managed in campaign A, you must manage 40 in campaign B. This value is a percentage, i.e. you must manage twice as many contacts in the B campaign.

- **Active on Create**, by selecting this option, the campaign will be activated immediately.
- **Script**, very important. Here you configure the text that the Agent should transmit to the customer. It is also possible to use this script to help the agent to answer the customer during the call.

DRAFT

5.- Reports

In the reporting module we will have the following options:



- **Agents Report**, activity report of each agent in a specific campaign.
- **Dispositions**, results type report for each campaign.
- **Call by Agent**, detailed calls by agent.

All reports can be exported to XLSX and CSV.

5.1.- Agents Report

In reports by agent, we will obtain a detail of the management of the agents in each campaign. You will also be able to see the management of each contact.

Agents Report XLSX CSV

Campaign: Ziemann Group | Agents: 4 selected | Date: 2021-01-01 00:00 - 2021-12-31 23:59

1.32% (53 / 4000 contacts)

Agent	Extension	Attended Contacts
Maynor Peralta	1000	10
Roger Gaitan	1001	8

Disposition Category: All Positive Call Later Negative

find by phone XLSX CSV

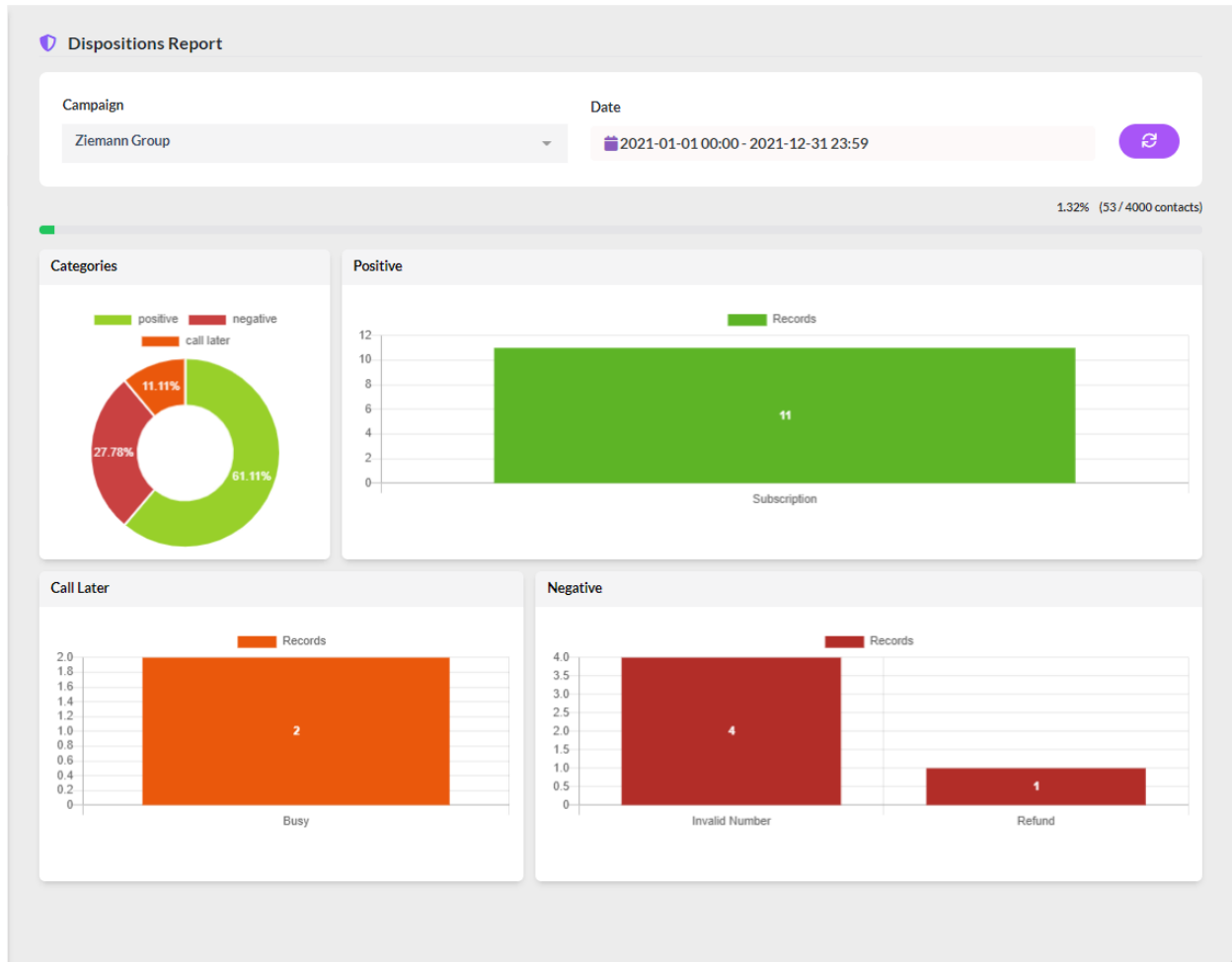
Contact	Disposition	Created At	Form Result
8103749840 Contact Info	Subscription	2021-12-01 15:01:16	<input type="button" value="show"/>
5135494561 Contact Info	Subscription	2021-12-01 15:07:06	<input type="button" value="show"/>
4198006759 Contact Info	Subscription	2021-12-03 15:06:05	<input type="button" value="show"/>
7739248565 Contact Info	Subscription	2021-12-06 10:56:36	<input type="button" value="show"/>
4088131105 Contact Info	Subscription	2021-12-06 10:57:38	<input type="button" value="show"/>
6057944895 Contact Info	Subscription	2021-12-06 11:00:25	<input type="button" value="show"/>

« < 1 > »

Pressing Show displays the result of the contact management and pressing Contact Info displays the contact details.

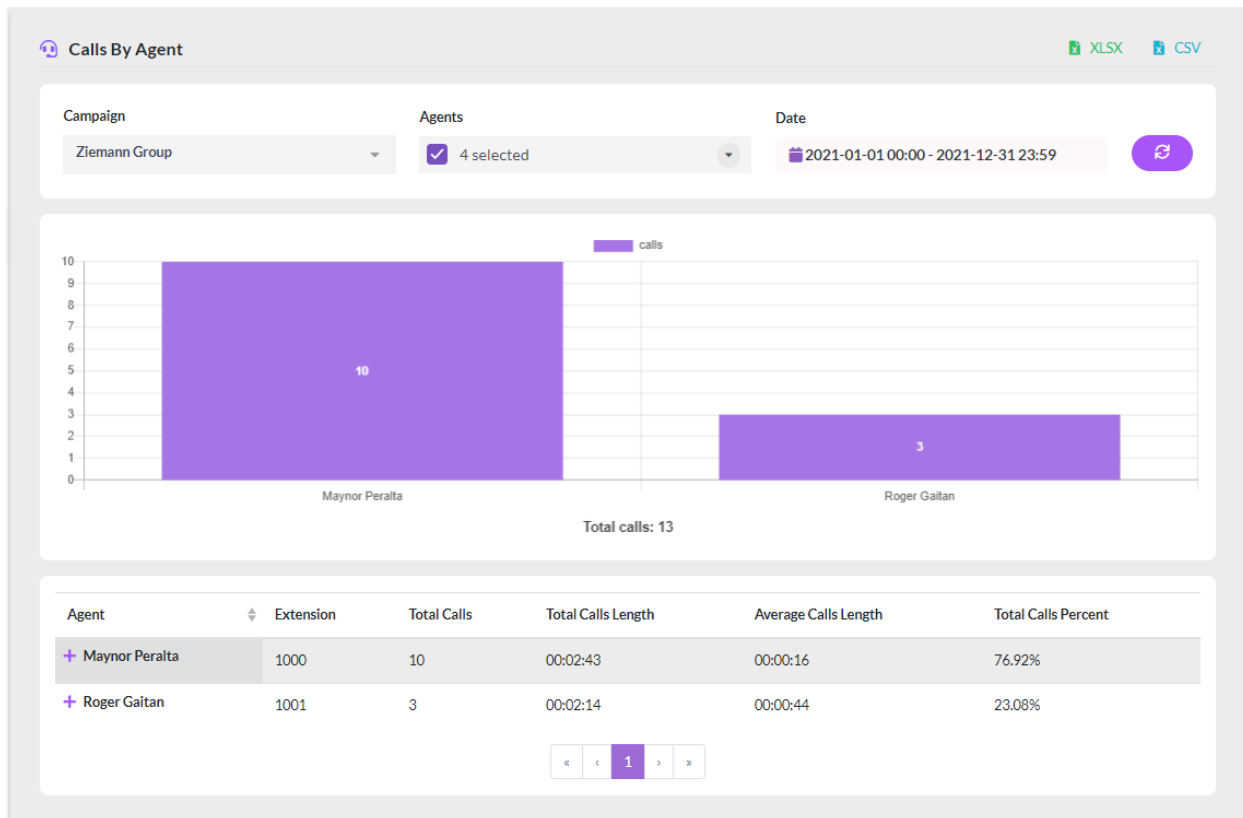
5.2.- Dispositions Reports

In this report we will see the overall results of each campaign organized by Disposition.



5.3.- Calls By Agent

This report shows a detail of calls by Agents in each Campaign.



Agent	Extension	Total Calls	Total Calls Length	Average Calls Length	Total Calls Percent
- Maynor Peralta	1000	10	00:02:43	00:00:16	76.92%

Date	Customer	Call Status	Duration
2021-11-30 17:14:31	13055698759	Cancelled	00:00:00
2021-12-01 10:38:15	13055698759	Answered	00:00:15
2021-12-01 13:12:18	13055698759	Cancelled	00:00:00
2021-12-03 13:17:53	13055698759	Cancelled	00:00:00
2021-12-03 14:52:39	13055698759	Cancelled	00:00:00
2021-12-03 14:54:32	13055698759	Cancelled	00:00:00
2021-12-14 11:38:46	13055698759	Answered	00:02:02
2021-12-14 13:33:25	13055698759	Cancelled	00:00:00

Agent	Extension	Total Calls	Total Calls Length	Average Calls Length	Total Calls Percent
+ Roger Gaitan	1001	3	00:02:14	00:00:44	23.08%

6.- Users

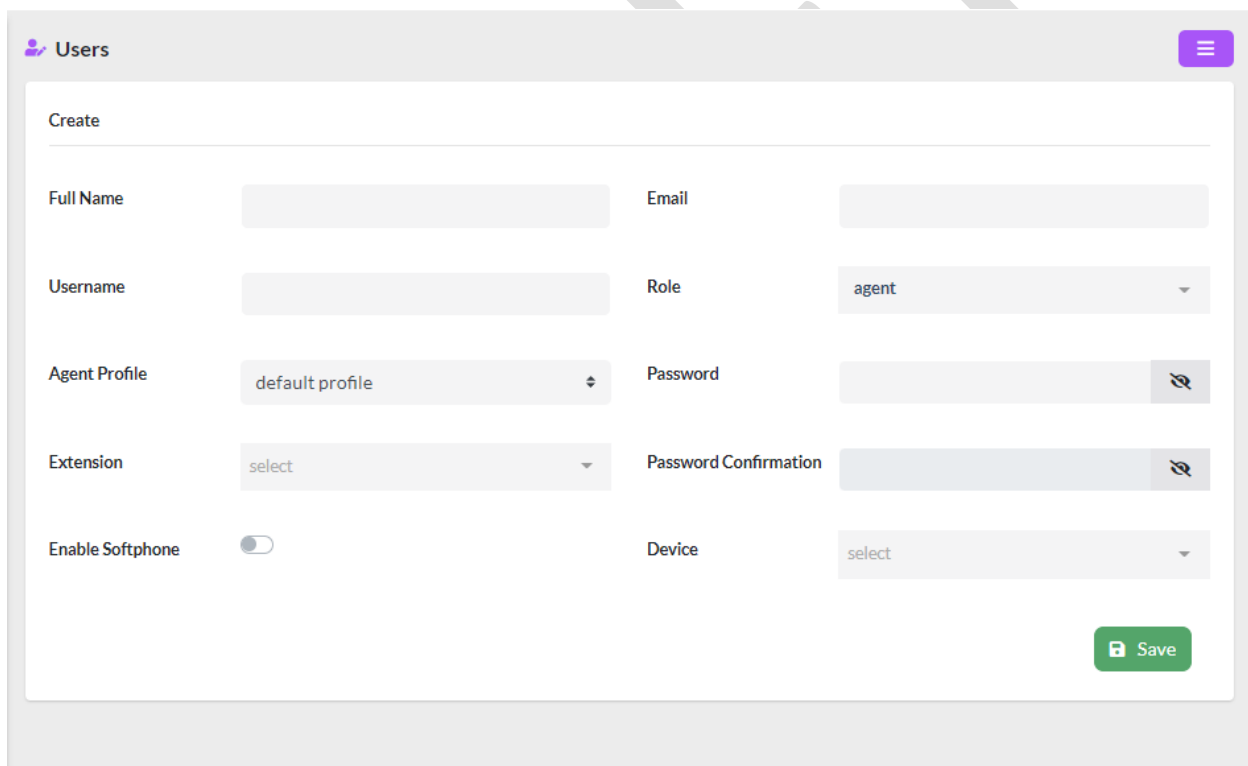
In users create and configure the following options.

- **User**, user creation and modification.
- **Agent Profile**, creation of causes of breaks for Users (Agents).
- **Roles**, creation of User permissions.
- **System Permissions**, creation of access to Agents, Campaigns and Queue. In order for a User not to be able to see other campaigns to which he/she is allowed to access.

6.1.- Users

In order to access the system, it is necessary to create users, there are two types of users:

- **Admin**, is for system administrators, it is not associated with any extension.
- **Agent**, is for Agents, it has to be associated to a device (Extension).



The screenshot displays a web interface for creating a new user. The page title is 'Users' with a user icon and a menu icon. Below the title is a 'Create' section with a horizontal line. The form contains the following fields:

- Full Name**: Text input field.
- Email**: Text input field.
- Username**: Text input field.
- Role**: Dropdown menu with 'agent' selected.
- Agent Profile**: Dropdown menu with 'default profile' selected.
- Password**: Text input field with a toggle icon to show/hide the password.
- Extension**: Dropdown menu with 'select' selected.
- Password Confirmation**: Text input field with a toggle icon to show/hide the password.
- Enable Softphone**: Toggle switch, currently turned off.
- Device**: Dropdown menu with 'select' selected.

A green 'Save' button is located at the bottom right of the form.

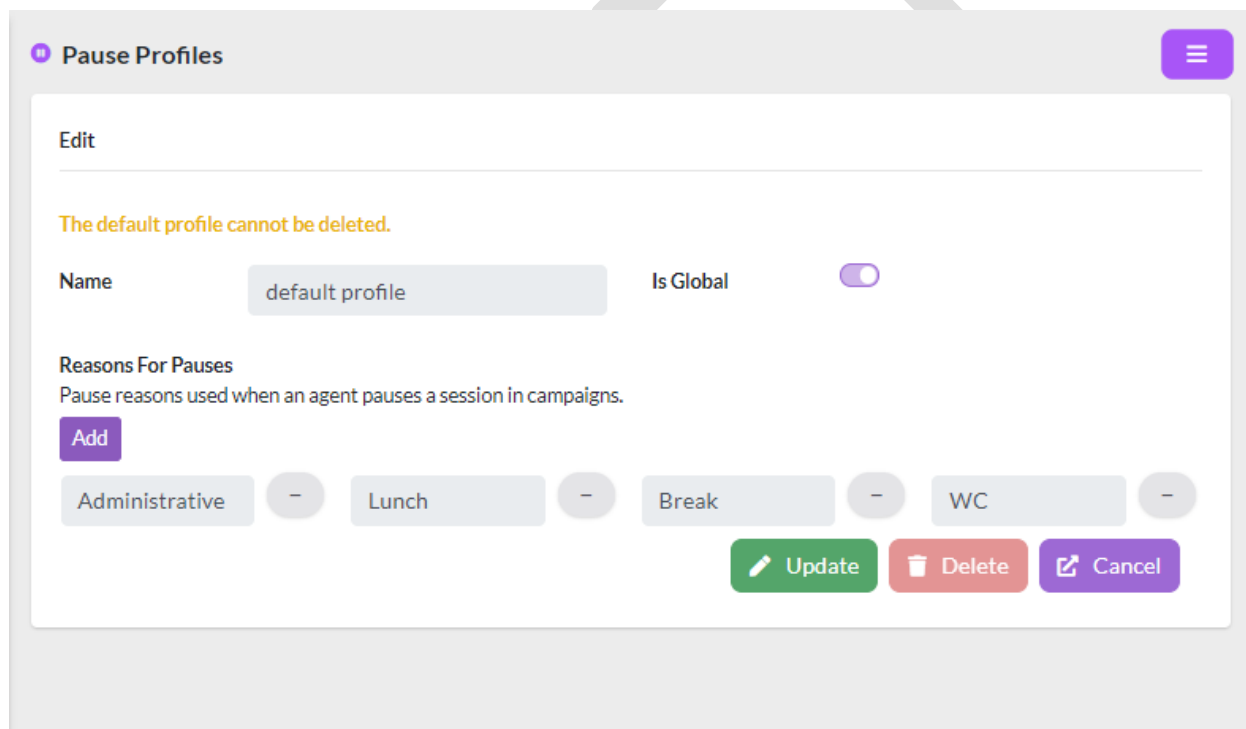
The data to consider when creating a user are as follows:

- **Full Name**, full name to identify the User.
- **Username**, short name to log in to the system.
- **Agent Profile**, type of pause profile if the user is an Agent.
- **Extension**, extension associated to the user. Necessary when dealing with an Agent.

- **Enable Softphone**, it is possible to have a WebRTC softphone integrated in the same Agent interface. When this option is enabled, it will appear. Please note that for this softphone to work you must have a VitXi license.
- **Email**, e-mail associated with the user.
- **Role**, by selecting "agent" this user becomes an Agent, any other role you choose is administrative.
- **Password**, password to login.
- **Password Confirmation**, confirmation of password to enter.
- **Device**, device to be associated with the Agent. It must be previously created in VitalPBX.

6.2.- Pause Profiles

Here we are going to create the profiles of the causes of pause of the Agents.



Pause Profiles

Edit

The default profile cannot be deleted.

Name Is Global

Reasons For Pauses
Pause reasons used when an agent pauses a session in campaigns.

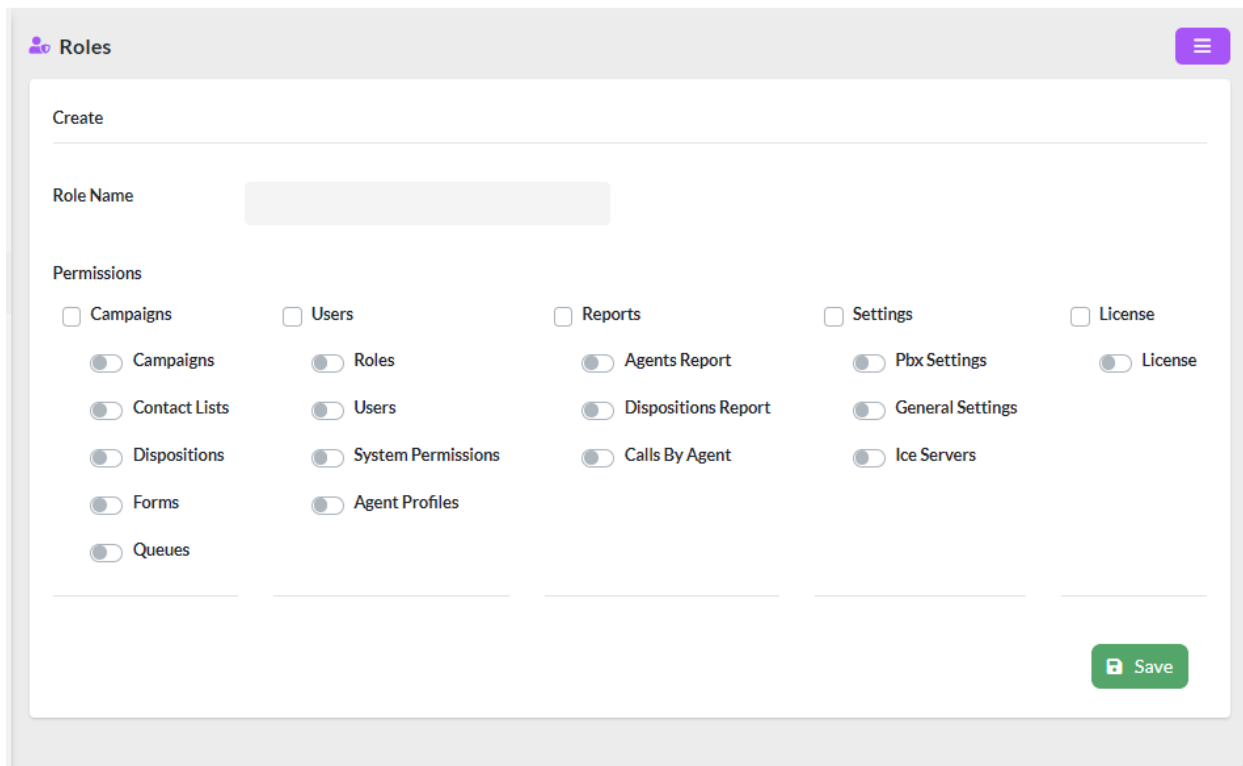
Add

Administrative - Lunch - Break - WC -

Update Delete Cancel

6.3.-Roles

In Roles we create the profiles that the system administrators are going to have.



Roles

Create

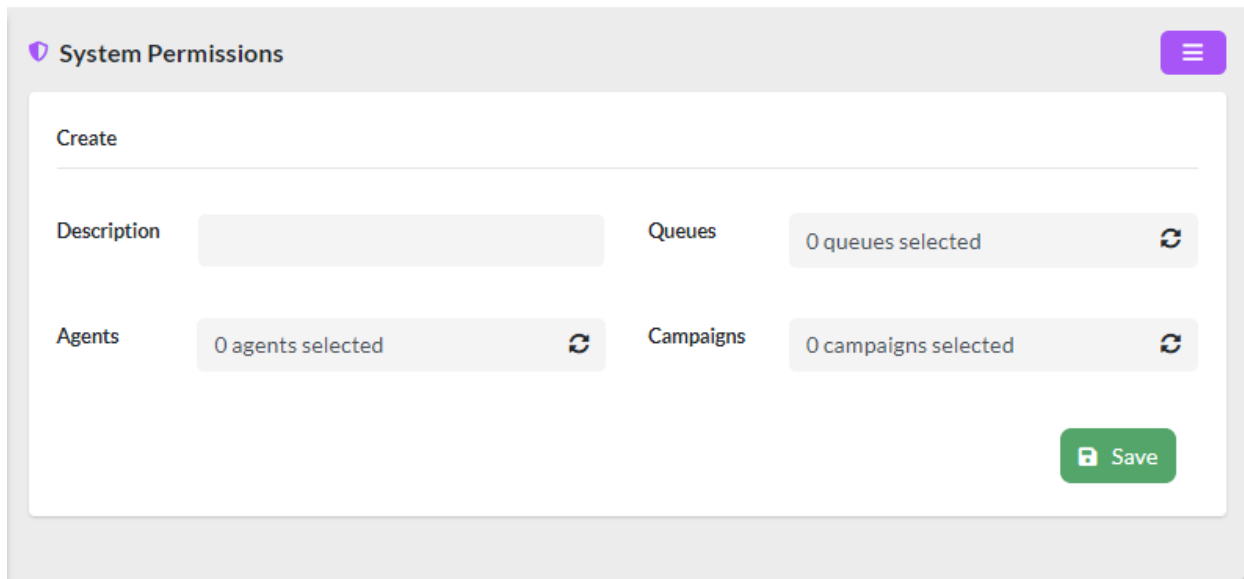
Role Name

Permissions

<input type="checkbox"/> Campaigns	<input type="checkbox"/> Users	<input type="checkbox"/> Reports	<input type="checkbox"/> Settings	<input type="checkbox"/> License
<input type="checkbox"/> Campaigns	<input type="checkbox"/> Roles	<input type="checkbox"/> Agents Report	<input type="checkbox"/> Pbx Settings	<input type="checkbox"/> License
<input type="checkbox"/> Contact Lists	<input type="checkbox"/> Users	<input type="checkbox"/> Dispositions Report	<input type="checkbox"/> General Settings	
<input type="checkbox"/> Dispositions	<input type="checkbox"/> System Permissions	<input type="checkbox"/> Calls By Agent	<input type="checkbox"/> Ice Servers	
<input type="checkbox"/> Forms	<input type="checkbox"/> Agent Profiles			
<input type="checkbox"/> Queues				

6.4.- System Permission

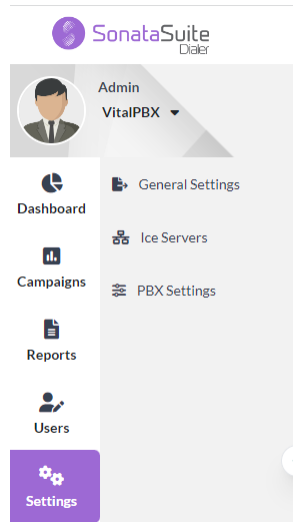
On many occasions the system is used by several departments in a company and we do not want one area to see what the other area is doing. This is where you configure which queues, agents and campaign the administrative user will have access to.



The screenshot shows a web interface titled "System Permissions". At the top left, there is a shield icon and the text "System Permissions". At the top right, there is a purple menu icon. Below the title, there is a "Create" section. The main area contains four fields: "Description" (a text input field), "Queues" (a dropdown menu showing "0 queues selected" with a refresh icon), "Agents" (a dropdown menu showing "0 agents selected" with a refresh icon), and "Campaigns" (a dropdown menu showing "0 campaigns selected" with a refresh icon). At the bottom right, there is a green "Save" button with a lock icon.

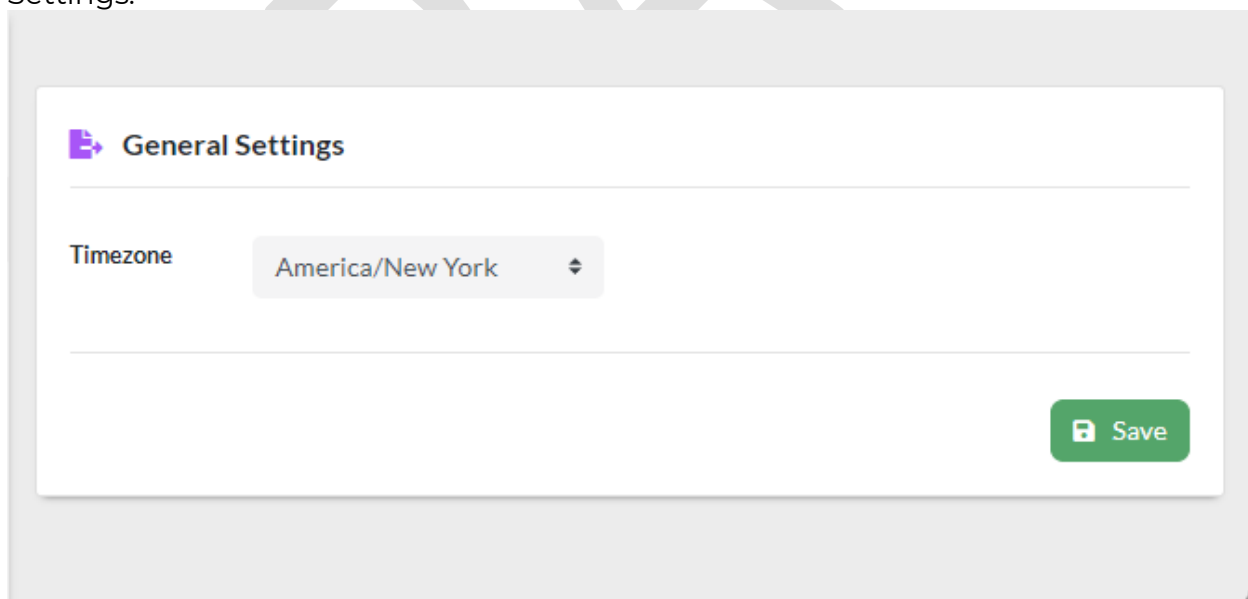
7.- Settings

In Settings we are going to configure the Time Zone, Ice Server and PBX Settings.



7.1.- General Settings

For the campaigns to run at the correct time and the reports to have the correct time it is necessary to configure the Time Zone. To do this go to Settings/General Settings.



7.2.- ICE Servers

Sonata Dialer incorporates a Softphone integrated in the Agent console, this softphone uses WebRTC technology, for which it is advisable to configure ICE Servers. Google servers can be used. To perform this configuration, go to Settings/ICE Servers.

ICE servers

Server - 1

STUN or TURN URI (1)

 ✓

STUN or TURN URI (2)

 ✓ + -

Authentication

+ Add Secondary Server

Save Reset

7.3.- PBX Settings

Although these parameters are configured when installing the App, it is possible to modify them later. To modify these initial settings, go to Settings/PBX Settings.

PBX Settings

Configure the relevant data to connect to your pbx. This information is necessary to register the extensions of your agents, queue management, among other features.

Host: localhost Port: 443 Secure:

PJSIP Port: 5060 WSS Port: 8089

App Key: the key has been obtained from the server ✓ ↻ ✕

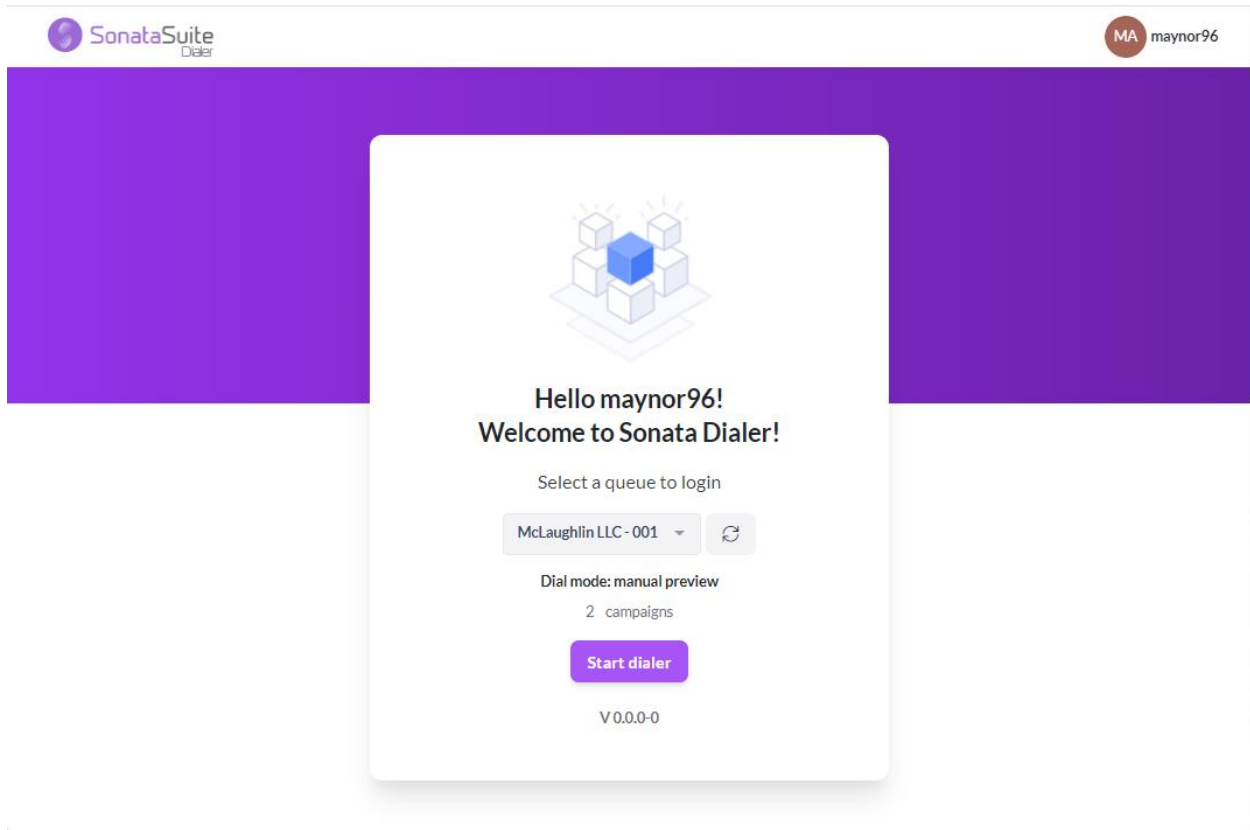
Save

The parameters that can be configured are as follows:

- **Host**, server where VitalPBX is installed, if the dialer is installed on the same server as VitalPBX, you must select localhost.
- **Port**, configuration port, usually 443.
- **Secure**, secure connection. You must select.
- **PJSIP Port**, registration port for PJSIP extensions.
- **WSS Port**, port for WebRTC to work.
- **App Key**, when using the dialer on the same VitalPBX server it is not necessary to add an API Key.

8.- Agent Console

When a user registers to the app as an agent, the following screen will be displayed.



Here you can select in which queue you want to register.

And after selecting the queue the following screen will appear where the calls will be initiated.

The screenshot displays the SonataSuite Dialer interface. At the top, the logo 'SonataSuite Dialer' is on the left, and navigation buttons for 'Queue: McLaughlin...', 'Scheduled Calls', 'Pause', and 'Finish' are on the right. A user profile 'MA maynor96' is also visible.

The interface is divided into several sections:

- Campaign:** Shows details for 'Ziemann Group', including start date (2021-11-30), end date (2022-02-28), start shift time (06:00:00), and shift end time (23:00:00).
- Contact:** Displays contact information for 'Lavera Perin' from 'Abc Enterprises Inc' in Miami, Dade County, Florida. A 'Processing' status is shown. Buttons for 'Schedule Call' and 'Make Call' are present.
- Form:** A data entry form with fields for 'Customer Name', 'Customer Email', and 'Customer Phone'. It also includes a 'Country' dropdown menu, a 'Comments' text area, and a 'Disposition' dropdown menu currently set to 'Invalid Number'. A 'Save' button is located at the bottom right of this section.
- Script:** Contains the heading 'Quae ista amicitia est?' followed by a block of Latin placeholder text.
- Right Panel:** Features a '1000 Registered' indicator, a 'number' input field, a numeric keypad (1-9, *, 0, #), a call button, and settings for 'Auto Answer', 'Audio Settings', and 'Devices Preferences'.

A.- Technical Specifications

Name	Sonata Dialer
Version	4.0.0-1
OS	Linux Debian 11
Compatibility	VitalPBX 4.x
Database	MariaDB 10x or higher
Developed Language	PHP 8, HTML,
Necessary Memory	2 GB
Necessary HDD	500 MB
Packet Technology	DEB
Dependency	Already installed in VitalPBX 4.x

DRAFT