MMDIAL PRO

mmDial Pro manual

The administration interface for campaigns, lists, agents and reporting

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1. About this manual

This manual describes the **administration interface of mmDial Pro**. You reach it after signing in at `login.mmdial.de`, in the `/mmdial/` area. Here you create campaigns, load address lists, manage agents, steer day-to-day operation and get the results back out again.

1.1 Who is this manual for?

For administrators and team leaders. Anybody making calls as an **agent** works in a different interface – the *Manual for agents* covers that.

If you use **mmDial Basic**, you work with a leaner administration. Much is identical, some things do not exist there. The *mmDial Basic manual* covers that.

1.2 A note on the interface language

mmDial is available in **German, English, Spanish, French, Dutch and Turkish**. The language belongs to the individual account, so you and your agents can each work in a different one. Many installations still run in German; the menu entries named here are therefore translations, but the position in the interface is the same in either case. The *Manual for agents* additionally gives the German wording for every button, because agents have to react to what is on the screen quickly.

1.3 How to read this manual

The chapters follow the order in which you usually need things: sign in and look around first, then create agents and campaigns, then load addresses, then make calls and report.

If you are working with mmDial for the first time, the best thing is to jump straight to the chapter *Your first campaign in ten minutes* in the appendix.

> **NOTE**
>
> The screenshots in this manual show sample data. The campaign names, agents and figures in them are invented.

1.4 Supplementary manuals

Two areas have been split out of this manual because they are extensive and only some customers need them:

- **Supplement – Inbound** – incoming calls, call blending, voice menus, queues and voicemail
- **Supplement – Workstations** – managing agents and workstations separately

1.5 Feedback

Is something missing, or does a section not describe what you see on your screen? Write to us by email at service@mmdial.de or through the contact form at mmdial.de (https://www.mmdial.de/kontakt.php). Every edition of this manual carries a version number at the top right – please quote it in your feedback.

2. Not every account sees the same thing

Before you read on, an important point: **mmDial does not look the same for all customers.** If a menu entry described in this manual is missing for you, that is as a rule not a fault.

2.1 Four levels decide what you see

Level	What depends on it
Your plan	mmDial Pro contains considerably more than mmDial Basic
Your enabled features	Individual additional functions are activated per customer – inbound, recordings, document sending or the AI agent, for instance
Your role	A group administrator sees less than a full account
The campaign	Some things are switched on and off per campaign, such as break reasons, manual dialling or transfers

2.2 How to recognise it

Sections that are not available in every account are marked in this manual like so:

> **NOT VISIBLE IN EVERY ACCOUNT**
> This function is not available in every account. If you cannot find the menu entry described, it is not enabled for you.

If something you need is missing, talk to us.

> **CAUTION**
> **Additional functions depend on the plan and are not automatically included in the standard plans.** Whether and on what terms something can be enabled is something we clarify with you case by case – so do not build a function firmly into your plans before that is settled.

> **NOTE**
> Conversely: if you see a menu entry that is not described here, you probably have a customer-specific extension. When in doubt, ask us rather than experimenting.

3. First steps

3.1 Signing in

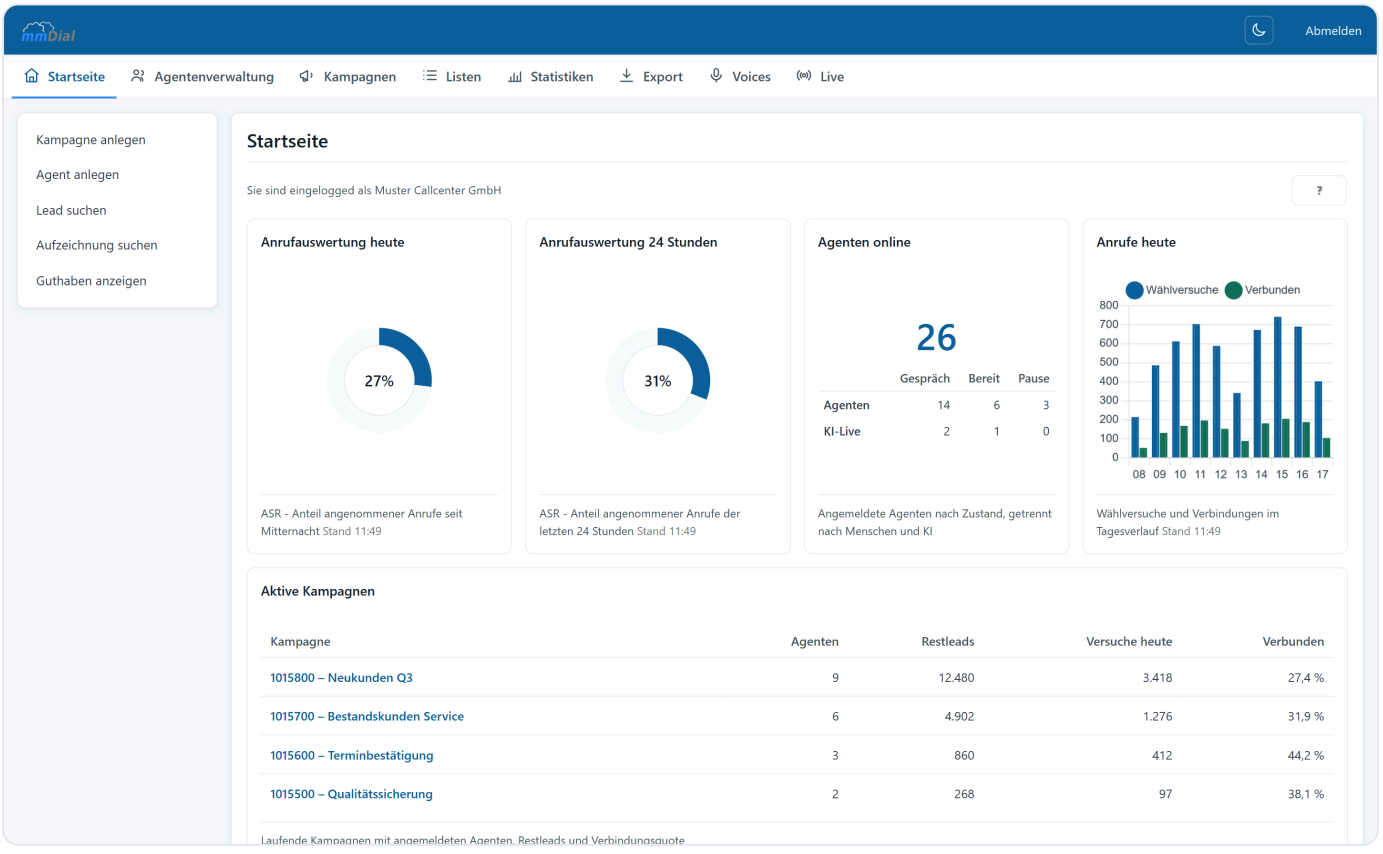
Go to `https://login.mmdial.de`. You need:

- your **user ID** – a number, for example `1015`
- your **password**

You received both by email after registering. After signing in you land on the home page of the administration.

> **CAUTION**
>
> The administration user ID is not the same login that your agents use. Agents have accounts of their own, which you create yourself – see the chapter *Agents and groups*.

3.2 The layout of the interface



The interface always has the same structure:

- **The blue bar at the top** with the logo, the switch between light and dark design and the *Sign out* button.

- **The main navigation below it**: home page, agent management, campaigns, lists, statistics, export, Voices, Live.
- **The submenu on the left**, which changes depending on the area chosen. On the home page it holds the most common actions.
- **The working area on the right.**

On narrow screens the navigation and submenu open out via a button.

3.3 Light and dark design

The switch in the top bar changes between the light and the dark design. The choice is remembered in your browser and applies again the next time you visit.

3.4 What the home page shows

Tile	What it means
Call reporting today	ASR since midnight – the share of dialling attempts that became a conversation with an agent
Call reporting 24 hours	The same figure over the last 24 hours
Agents online	Signed-in agents by state: on a call, ready, on a break. Humans and AI agents are counted separately
Calls today	Dialling attempts and calls actually connected over the course of the day
Active campaigns	Per running campaign: signed-in agents, remaining leads, attempts today and connection rate

Using the link in each campaign row you jump straight into the campaign or into its live view.

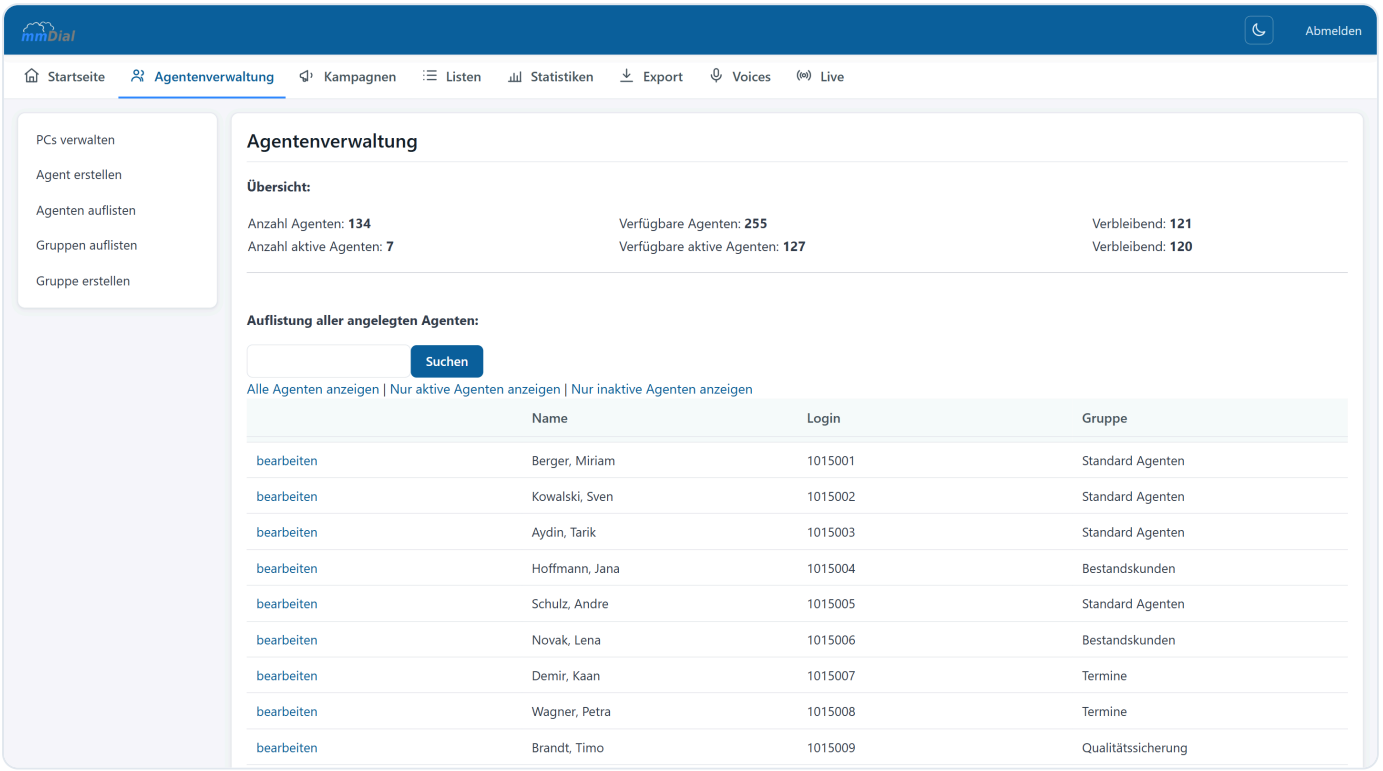
3.5 Quick access

The home page submenu leads to the five most common tasks:

- Create a campaign
- Create an agent
- Search for a lead
- Search for a recording
- Show credit

4. Agents and groups

Before anybody can make calls, they need an agent account. You will find everything to do with that under **Agent management**.



4.1 Understanding the overview

At the very top there are four numbers:

- **Number of agents** – how many accounts you have created in total
- **Number of active agents** – how many of those are set to *active*
- **Available agents** / **available active agents** – the quota you have booked
- **Remaining** – how many more you may create

> **NOTE**
>
> An agent account costs nothing extra – the only thing limited by the package you have booked is the number of agents **signed in at the same time**. So you can create more accounts than can make calls simultaneously.

4.2 Creating an agent

1. **Agent management → Create agent**
2. Enter the name and login details
3. Set the state: *active* for everyone who is to make calls
4. Assign a group
5. Set the permissions (see below)
6. Save

4.3 Permissions per agent

Permission	Effect
Lead search	*Not permitted*, *Search within the campaign* or *Search across all campaigns*. Determines whether an agent may search for records themselves
Delete lists	Allows the agent to delete lists. Normally off
List exports	Allows the agent to pull exports
Listen to recordings	Allows access to the call recordings
Administration only	The account **cannot** sign in to the agent desk – intended for team leaders who only watch and report
Group administrator	May manage the agents of their own group

> **TIP**
>
> Create team leaders as *Administration only*. Such accounts do not count against your quota of agents making calls at the same time.

4.4 Groups

> **NOT VISIBLE IN EVERY ACCOUNT**
>
> Group management is enabled for your account.

Groups bundle agents and their campaign permissions. Instead of telling each agent individually which campaigns they may see, you assign them to a group.

- **List groups** shows all groups with the campaigns assigned to them.
- **Create group** creates a new one; you then choose whether it may see *all campaigns* or only particular ones.

A typical structure:

- *Standard agents* – only the current outbound campaigns
- *Existing customers* – only the service campaigns
- *Team leadership* – all campaigns, plus group administrator

4.5 Workstations

In mmDial the telephony belongs to the agent: whoever signs in can work from any computer. In some older setups it is tied to the workstation instead.

> **DEPRECATED – BEING RETIRED**
>
> Managing agents and workstations separately is **deprecated and is being retired**. It is no longer used for new setups. Affected existing customers will find the description in the **Supplement – Workstations**; everyone else can skip this section.

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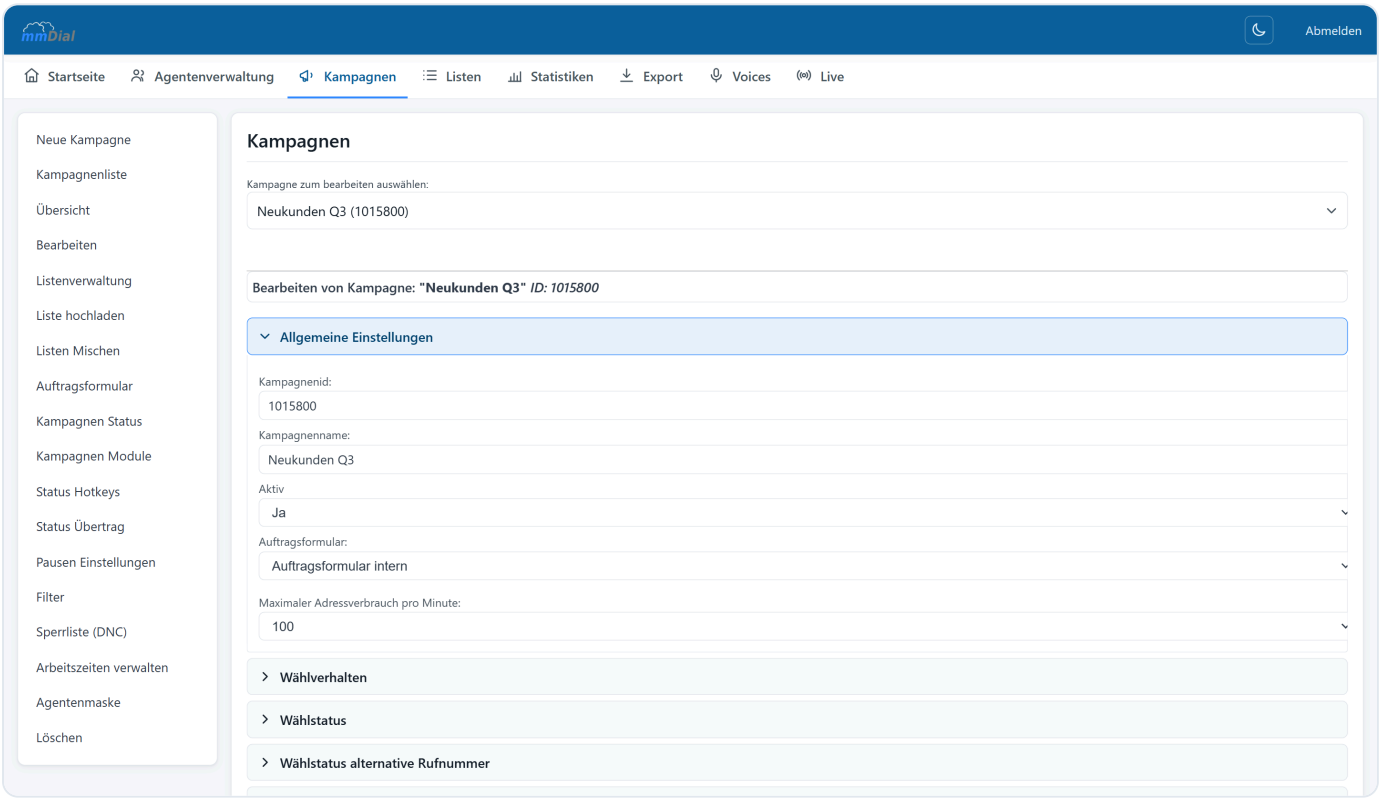
5. Campaigns

The campaign is the central unit in mmDial. It brings together:

- one or more **address lists**
- the **agents** who work in it
- the **dialling behaviour**
- the **call outcomes** that agents can set
- the **number displayed**
- optionally an **order form**



5.1 Creating a campaign

1. **Campaigns → New campaign**
2. Give it a name – choose something meaningful like `New customers Q3`, not `Test 4`
3. Save
4. Then work through the settings (the following sections)

The **campaign ID** is assigned by the system. It appears in exports, statistics and file names – make a note of it when you discuss figures with clients.

5.2 General settings

Field	What it means
Campaign name	Freely chosen, appears everywhere in the interface
Active	If this is *No*, no dialling takes place and agents cannot book in
Order form	Which screen the agent sees during the call – *none*, *internal* or *external*
Maximum records used per minute	A cap on the number of records dialled. Protects a thin stock
Description	An internal note
Colour and short code	Make it easier to tell many campaigns apart

5.3 The areas of the campaign settings

The settings page is divided into collapsible areas:

- **General settings** – see above
- **Dialling behaviour** – how and how fast dialling happens
- **Call outcomes** – which results agents can set
- **Call outcomes for the alternative number** – the same for a lead's second number
- **Dialling rules** – which outcomes are dialled again
- **Further settings** – recording, caller ID and special cases

5.4 The campaign submenu

Entry	What for
New campaign	Create a campaign
Campaign list	All campaigns, with active and inactive filterable separately
Overview	Key figures for the chosen campaign
Edit	The settings page
List management	Which lists are attached to this campaign
Upload list	Load addresses in
Mix lists	Feed several lists in proportionally
Order form	The screen for the agent
Campaign outcomes	Your own call outcomes
Campaign modules	Additional functions in the agent desk
Outcome hotkeys	Keyboard shortcuts for outcomes
Outcome forwarding	Automatic handover to other campaigns
Break settings	Break reasons
Filter	Selective lead feeding
Blocklist (DNC)	Numbers that must not be called
Manage working hours	When automatic dialling takes place
Agent screen	The form editor
Delete	Remove the campaign

> **NOT VISIBLE IN EVERY ACCOUNT**
> Not all of these entries are present in every account. The order form, breaks, working hours, the list mix and several others are enabled separately.

> **CAUTION**
> A campaign can only be deleted when it is **not active** and no active lists are attached to it any more. That is deliberate – it stops work in progress from disappearing by accident.

5.5 Copying a campaign

Instead of rebuilding a similar campaign by hand, copy an existing one. The copy mode takes over the settings, the outcomes and the form assignment. The lists stay with the source campaign.

6. Dialling behaviour

This is where it is decided how productively your campaign runs – and whether you stay on the right side of the law.

6.1 The dialling mode

Mode	When it makes sense
Manual	The agent starts every call themselves. For callbacks, existing customers, appointment confirmations
Predictive	The system dials several numbers at once and recalculates continuously. Sensible from around five to eight agents working simultaneously

With predictive dialling you additionally choose the **dialling level**: either fixed (`2.5` lines per agent, for example) or automatic.

6.2 The automatic levels

Level	Behaviour
Average	Cautious. Few abandons, but somewhat more waiting time for agents
Aggressive	Higher utilisation, more risk of abandoned calls
Strict	Maximum utilisation. Only with a good stock of records and a watchful eye

6.3 The abandon rate

An **abandoned call** arises when somebody picks up and no agent happens to be free. That annoys the people you call and is legally delicate.

- **Maximum abandon rate** – the limit that mmDial is to keep to. The dialler throttles itself before it reaches it. Whether you may change this value yourself, and in what steps, is set for your account.
- **Drop call after (seconds)** – the maximum time a person called waits.
- **DROP action** and **DROP destination** – what happens if a call is abandoned after all: hang up or play an announcement.

> **CAUTION**
> Do not set the abandon rate to a high value "so that more gets through". You risk complaints and fines by doing so. A low single-digit percentage is the usual range.

6.4 Redialling

- **Redial after** – the waiting time before a number that was not reached is tried again
- **Maximum number of attempts** – after which the lead rests

6.5 Time windows

Under **Working hours (automatic dialling only)** you define when dialling is permitted. There are ready-made templates (9 a.m.–5 p.m., noon–5 p.m., 5–9 p.m., 9 a.m.–9 p.m., 24 hours) and a freely adjustable window.

> **CAUTION**
> Keep to the legally permitted calling hours. mmDial implements technically what you set – the legal check remains with you.

6.6 Caller ID (CLIP)

- **CLIP number** – which number appears at the other end
- **CLIP numbers per area code** (separately enabled) – store a list in the format `area code;CLIP number;description`, and the number matching the destination area code is displayed
- **Agent CLIP** – either always the campaign number or, if one is stored, the agent's number

6.7 Live-person detection

Recognises answering machines and recorded announcements and sorts them out before an agent is tied up. Without this function your agents regularly end up on mailboxes.

6.8 Further settings

Field	What it means
On-hold music	What the person called hears until the agent takes over
Duplicate check	Prevents the same number being dialled more than once
Record the agent channel	Whether only the agent or the whole call is recorded
Recording delay	Starts the recording only after a few seconds
Lead search for agents	As with the agent permissions, but here per campaign
Campaign dial prefix	A technical prefix for dialling

7. Call outcomes, hotkeys and outcome forwarding

7.1 What call outcomes are for

At the end of every call the agent sets an outcome. Your reporting, your follow-ups and your exports all arise from that. mmDial comes with standard outcomes; you add to them per campaign.

Common standard codes:

Code	What it means
`NEW`	A new lead, not yet called
`A` / `AA`	Reached / answering machine
`B`	Busy
`N` / `NA`	Not reached / number unobtainable
`DROP`	Abandoned call
`CALLBK`	Follow-up arranged
`SALE`	Success

7.2 Creating your own outcomes

Under **Campaigns → Campaign outcomes** you create your own outcomes. For each one you decide:

- **Outcome counts as a sale** – counts as a success in the reporting
- **Outcome counts as not interested** – counts as a refusal
- **Outcome for callbacks** – automatically creates a follow-up
- **Outcome for the campaign blocklist** – takes the lead out of dialling permanently
- **Selectable by agents** – some outcomes are set only by the system

> **TIP**
>
> Keep the list short. Twelve outcomes that an agent can take in during a call deliver better data than forty they guess at.

7.3 Outcome hotkeys

Under **Outcome hotkeys** you define keyboard shortcuts. Agents then set the outcome with a keypress instead of a mouse click – at high throughput that saves noticeable time.

7.4 Outcome forwarding

Outcome forwarding moves or copies a lead automatically as soon as a particular outcome is set. The destinations:

- **Export to campaign** – for example all sales into a QA campaign
- **Export to list** – into a particular list
- **Export to order form** – into a different form

Additional possibilities:

- Copy all data and the history along with it
- Copy only the most recent history per lead
- Empty fields in the destination campaign
- Copy the order form along with it

Outcome forwarding can be activated and deactivated without deleting it.

7.5 Dialling rules

Under **Dialling rules** in the campaign settings you decide which call outcomes are dialled again. That is how you control whether somebody not reached comes up again or rests.

> **NOT VISIBLE IN EVERY ACCOUNT**
> The automatic dialling rules are enabled separately.

In addition there are **automatic dialling rules for leads that were not reached**: you store a filter rule, an age and a destination list. The system works through the rule on a schedule and moves the leads concerned.

---

8. Breaks and working hours

8.1 Break reasons

> **NOT VISIBLE IN EVERY ACCOUNT**
>
> Break management is not active in every account.

Under **Campaigns → Break settings** you define which break reasons an agent can choose – *short break*, *lunch*, *training*, *technical problem*, for instance.

For each break type a **time limit** can be stored. In the reporting you can see afterwards how much time went to which reason.

Settings can be copied from another campaign instead of being entered again.

8.2 Working hours

> **NOT VISIBLE IN EVERY ACCOUNT**
>
> Standalone working-hours management is enabled separately. You set the time window for automatic dialling per campaign independently of it.

Under **Manage working hours** you store a standard time window (start and end) for each day of the week, along with daily options. That controls the automatic dialling.

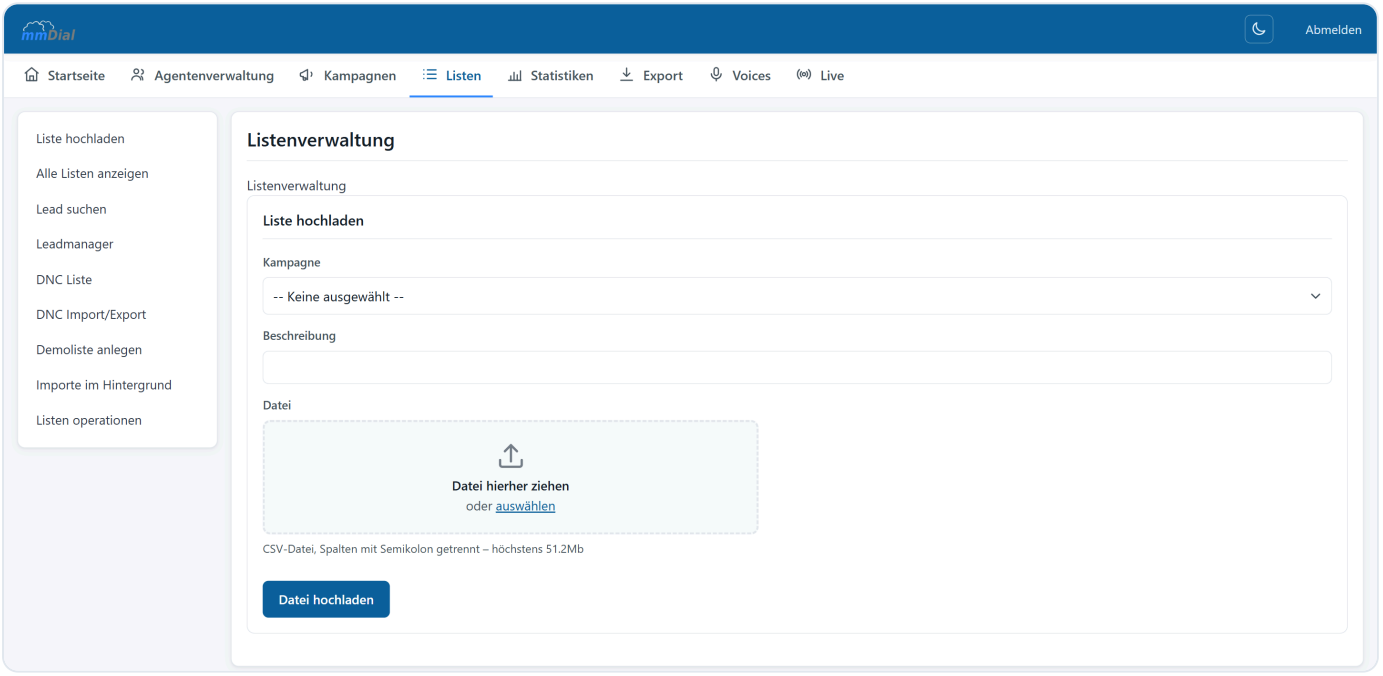
9. Lists and leads

9.1 The three levels

- **Campaign** – the project
- **List** – a batch of records, usually one CSV delivery
- **Lead** – a single record

A campaign can have any number of lists. A lead always belongs to exactly one list.

9.2 Uploading a list



1. **Lists → Upload list**
2. Choose the **campaign**
3. Enter a **description** – use the file name or the delivery week
4. Drag the **CSV file** into the dashed field or find it via *select*
5. Upload

The file has to be a **CSV file with semicolons as the separator**. The maximum file size is shown below the field.

9.3 Mapping fields

After uploading you see a preview of your data. On the right is the list of **customer fields** that mmDial knows about. Drag each field you need onto the matching column:

Field	Note
Phone number	Mandatory field
Phone number (area code) / (number)	If the number is supplied split in your file
Alternative phone number	A second number the agent dials when needed
Title, first name, surname	
Company name	
Street, house number, postcode, town	
Country (code)	Two-letter country code
Date of birth	
Additional, notes	Free-text fields for anything else
External lead ID	Your own ID or your client's – important for exporting back

You only have to do the mapping once; after that you start the import.

9.4 Import settings

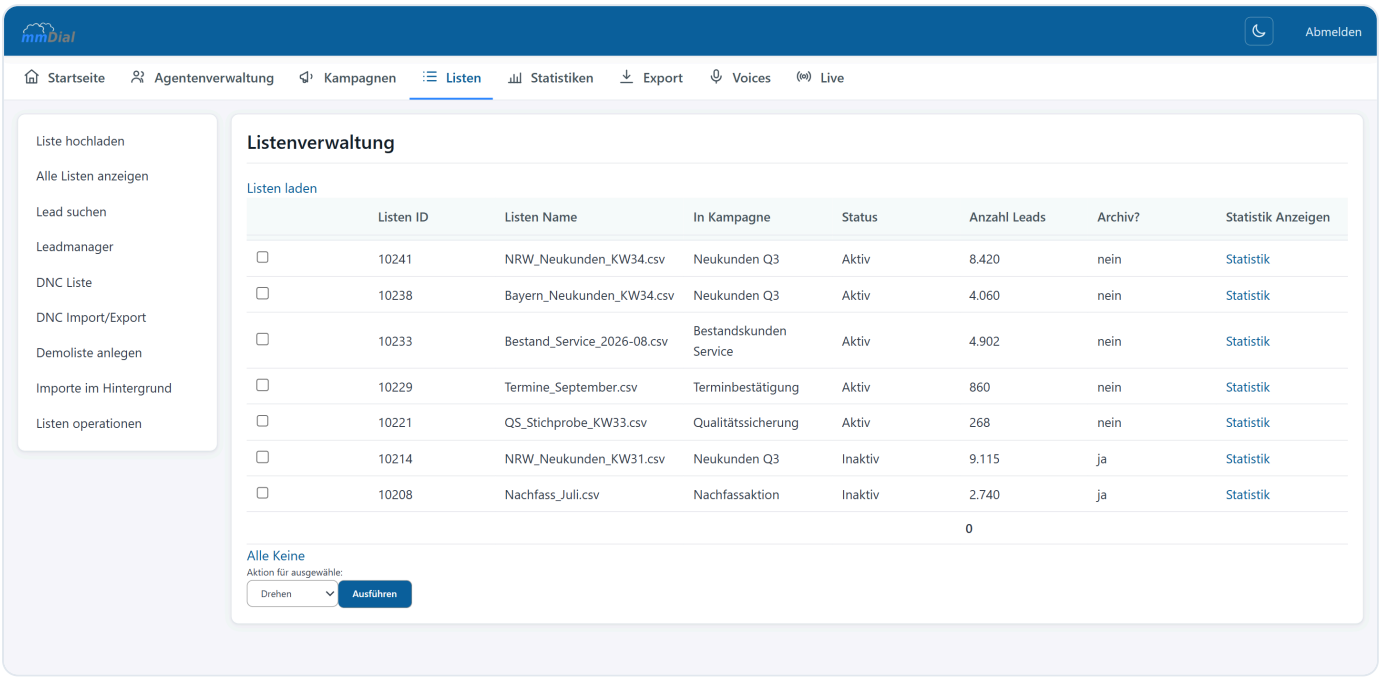
Setting	Effect
Duplicate check within the campaign	Numbers that already exist in this campaign are skipped
Duplicate check across all campaigns	The same across your whole stock
Filter invalid phone numbers	Obviously unusable numbers are thrown out
Area code for the list	Adds a fixed area code if it is missing from the data
File encoding	ISO-8859-1, Windows-1252 or UTF-8
Lead status	The outcome the leads start with, usually `NEW`

> **TIP**
>
> If accented characters are mangled after the import, the encoding was wrong. Delete the list and import it again with the other setting – that is quicker than repairing it afterwards.

9.5 Large files

Very large imports run in the background. You can see the progress under **Lists → Background imports**.

9.6 List management



Under **Lists → Show all lists** your lists appear with their list ID, name, campaign, status, number of leads and archive marker.

Select one or more lists and choose an **action** at the bottom:

Action	What it means
Rotate	Put all leads not successfully finished back into dialling
Activate / deactivate	Determines whether this list is dialled from
Archive	Take it out of the working area; the reporting is retained
Retrieve from archive	Undo that
Export	Pull it out as a file
Delete	Remove it permanently

> **CAUTION**
>
> An **active** list cannot be deleted, and neither can an **archived** one. Deactivate it or retrieve it from the archive first.

9.7 Rotating lists

When you rotate, all leads that do not have a final result get their starting outcome back again. The display *Called since the last rotation* helps you judge whether another pass is worth it.

9.8 Mixing lists

> **NOT VISIBLE IN EVERY ACCOUNT**
> Mixing several lists is enabled separately.

Under **Mix lists** you feed several lists in together:

- **proportionally** – one list after another in rotation (1, 2, 3, 1, 2, 3 …)
- **at random**
- stating how many leads are drawn from each list

That is useful when you are supposed to work through several batches evenly rather than burning through one first.

9.9 Finding a single lead

Lists → Search lead searches your stock by phone number, name or lead ID. In the result you can view, edit, move, copy, block or delete the record – and see the call history including follow-ups.

---

10. Filters and the lead manager

10.1 The filter builder

Under **Campaigns** → **Filter** you assemble the rules by which leads are fed in. That way you call deliberately instead of working through the whole stock from the beginning.

A filter rule consists of a field, a comparison and a value – for example *postcode starts with 40* or *date of birth before 1970*. Several conditions can be combined.

Available for selection are, among others: salutation, first name and surname, street, postcode, town, country, date of birth, company name, status, list ID and your additional fields.

Saved filters appear in the campaign and can be switched on and off.

10.2 The lead manager

Lists → **Lead manager** is the tool for everything that has to happen to the raw data before it is allowed into a campaign.

It can **enrich** your stock – that is, add fields from a second source:

- by **phone number**
- by **lead ID**
- by **external lead ID**
- by any **lead field**
- via a **lookup table**
- from an **order form** using the lead ID

It can also:

- **Split addresses** – breaks `Beispielstrasse 6 12345 Ort` into the individual fields
- **Convert date formats** – between `DD.MM.YYYY`, `YYYY-MM-DD` and date with time
- **Filter files** – read in CSV, text and spreadsheet files by drag & drop and download them again filtered

11. Blocklist (DNC)

Numbers that must no longer be called belong on the blocklist.

11.1 Two levels

- **Campaign blocklist** – applies to one campaign only. Found under **Campaigns → Blocklist (DNC)**
- **Global blocklist** – applies to your whole stock. Found under **Lists → DNC list**

11.2 Maintaining entries

- Add individual numbers by hand
- Load whole lists in or pull them out via **DNC import/export**
- Block all leads found by a search at once
- Show leads that are already blocked
- Empty the list

Agents can block a lead directly from the call. On import, blocked numbers are skipped.

> **CAUTION**
>
> You have to implement objections to marketing calls reliably. When in doubt, use the **global** blocklist – it also applies when the same number turns up in another campaign later.

12. Order form and agent screen

12.1 What is an order form for?

If your agents are to capture more than an outcome – orders, appointments, consultation records – they get an order form. It appears in the agent desk next to the customer data.

12.2 Internal or external

- **internal** – you build the screen in mmDial yourself
- **external** – you embed a form from your own system. mmDial hands over the call data, the processing stays with you

12.3 The form editor

> **NOT VISIBLE IN EVERY ACCOUNT**
> The form editor is enabled for your account. Without it, we set up order forms for you.

Under **Campaigns** → **Agent screen** you assemble the screen.

Field types:

- Text field
- Dropdown
- Multiple choice
- Checkbox
- Date field

Fields from the customer record can be used directly: first name, surname, company name, street, house number, town, country, date of birth, lead ID, list ID, external lead ID.

Arrangement: the screen consists of cards, which can be added and removed. You move fields left, right, up and down and change their size. For extensive screens you create several pages.

Field permissions determine per agent or group whether a field is visible, writable or read-only.

Preview: before you release the screen, you see it as the agent will see it.

TIP

The editor also shows the code it generates. It recognises hand-written screens and leaves them alone – if it says "*This screen is hand-written*", do not change it through the builder, or the hand work will be lost.

12.4 Letting the agent edit the lead

NOT VISIBLE IN EVERY ACCOUNT

This function is enabled for your account. Without it, the card does not appear in the campaign editor.

If it turns out during a call that the name is misspelt or the address is out of date, somebody used to have to put it right afterwards in lead management – or it stayed wrong.

Per campaign you release:

- **which fields** the agent may change
- whether the **phone numbers** are among them
- **where the notification** about the change goes

CAUTION

The phone numbers are the delicate part. An agent who changes the number changes who your dialler calls next time. Only release them where that is genuinely needed.

12.5 Enforced outcomes

You can specify that particular outcomes may only be set when the order form has been filled in completely. Otherwise the agent gets the message "*Order form not filled in!*".

12.6 Sending documents

NOT VISIBLE IN EVERY ACCOUNT

Document sending is enabled for your account.

Completed forms can be output as a print job or sent as an email with an attachment – personalised with the data from the form if you wish. You set the sender, recipient, subject and attachments for each document.

13. Inbound and call blending

With call blending your agents take incoming calls while working in an outbound campaign. Incoming calls take precedence over automatic dialling, and for known callers the agent immediately sees the customer data.

This includes inbound campaigns, queues with announcements and on-hold music, voice menus, voicemail and priority treatment for particular callers.

> **NOT VISIBLE IN EVERY ACCOUNT**
>
> Inbound is enabled for your account and is not active for all customers; individual components are additionally activated separately. The full guide is in the **Supplement – Inbound** – there you will also find the order in which you should set things up and the pitfalls that occur frequently.

14. AI Agent Live

> **MMDIAL PRO ONLY**
>
> AI Agent Live is **enabled per customer**. If the function is not visible for you, talk to us.

14.1 What the AI agent does

In an AI campaign the conversation is run not by a human but by an AI agent. The dialler dials as usual; when somebody picks up, the AI takes over, speaks with a natural voice and follows the guide you have stored.

If it detects an answering machine, it hangs up. If it detects interest, it forwards to one of your agents.

14.2 Setting up an AI campaign

1. Create the campaign as usual
2. In the campaign settings set **AI campaign** to *Yes*
3. Choose *AI Agent Live* as the **AI campaign type**
4. Set the prompts, voice and limits (see below)

14.3 The prompts

Prompt	What for
AI prompt	The call guide. Who is calling, what it is about, what should be asked, what must never be said
AI SALE prompt	Describes when a call counts as a success
Prompt for forwarding	Describes when to hand over to a human

You write prompts in plain language, not in a programming language.

> **TIP**
>
> Phrase them concisely and as instructions. "First ask whether the person is a decision-maker. If not, end the conversation politely." works better than a long piece of prose.

14.4 Voice and opening

- **AI voice** – several voices in different languages, female and male alike
- **Conversation started by** – *customer speaks first* or *agent speaks first*
- If the AI speaks first: a **fixed first sentence** or a **prompt for the first sentence**, a **delay**, and whether it **can be interrupted**
- If the customer speaks first: after what waiting time the AI starts by itself if nothing comes

14.5 A fixed announcement before the AI

You can have an audio file played before the AI takes over – a greeting, for instance, or the legally required notice. Store the address of the `.mp3` and its length. Optionally you also supply the spoken text in writing, so that the AI knows it and does not greet the person twice.

14.6 Limits

Setting	What it means
Maximum call length with the AI	A cap on the AI portion
Maximum total call length	Including the forwarding
Minimum call length for the SALE prompt	Stops brief contacts counting as a success
The campaign's time window	When it runs. It starts and stops automatically; the field states the permitted frame

In addition, the number of **simultaneous AI lines** is limited and is agreed per customer.

> **NOTE**
> The AI functions are **bought in internationally, depending on the function wanted** – which provider is used follows from what the campaign has to be able to do. We name the ones that apply in your case when the feature is enabled; the details of the processing are set out in the data processing agreement.

14.7 Forwarding to a human

You store:

- the **prompt for the forwarding**
- the **destination number** in the format `0049…`
- optionally the **caller ID** displayed when doing so. If the field stays empty, the number of the person called is used

The agent taking over sees the customer data in their screen immediately.

14.8 Answering-machine detection

Two detection methods:

- **Detection during the AI conversation** (the default) – only takes effect once the AI has taken over
- **Detection directly at call setup** – also works with a pre-announcement

You can use the built-in pattern list and additionally store:

- **strong keywords** that trigger on their own
- **weak keywords** with a threshold
- words that **deliberately must not** trigger – real people who must not be dropped
- a **minimum length** from which a text is checked
- the **length of monologue** as an additional indication

14.9 The AI in the live view and the statistics

AI agents are counted separately from humans. In the statistics, a call in an AI campaign only counts as successful if it was actually put through to the AI.

> **CAUTION**
>
> If the person you are speaking to is talking to an automated system, that must be recognisable. The rules for telephone marketing and for recording calls also continue to apply unchanged. Build the notice into the opening of the conversation.

15. Notifications to other systems (webhooks)

> **NOT VISIBLE IN EVERY ACCOUNT**
> The notifications are under **Campaigns → Modules and notifications**. The menu entry used to be called *Campaign modules*.

Anyone keeping their leads in a system of their own used to have to ask what mmDial had made of them. With notifications, mmDial speaks up by itself.

The application calls them *notifications*; if you come from development, you know them as **webhooks**. They are the same thing: mmDial calls an address of yours as soon as something happens.

15.1 Creating a rule

You store rules per campaign. Each rule has a **trigger** and one or more **destinations**.

Trigger	When it applies
Change of outcome	A lead is given a different call outcome
Lead edit	Somebody changes a lead's data

For each rule you additionally choose **who** triggers it: the agent, the administration or the API. That way a bulk change from lead management stays silent while every agent's result is reported.

15.2 Only for particular outcomes

Every rule has an **outcome filter**. Left empty, the rule applies to every outcome – as it did before. Enter outcomes and it fires only for those; on a change of outcome it is the **new** outcome that counts.

> **TIP**
> The commonest case is a rule for the success outcome alone. Without a filter, your system is told about every “not reached” – and those are the majority.

15.3 The destinations

- up to **three addresses** per rule, each one as an **HTTP POST** or as **JSON**
- optionally an **email** as well, for which you write a template of your own

15.4 What is sent along

Always included are the **lead ID** and the **user** field – who triggered the notification. It holds the agent's ID when an agent triggered it, `admin` for a customer account in the administration and `api` for the interface. For a change of outcome, the **old and the new outcome** come with it.

Which master-data fields go along is up to you to tick; the same fields are offered as in the export and in the form editor. One button ticks them all at once.

15.5 The email template

If the rule is to send an email as well, you write the template for it in the editor – with formatting, not as a bare text box. The templates sit with the document templates, so they can be reused.

> **TIP**
>
> Test a new rule against an address that simply mirrors the request back to you before you point it at your production system. The reason a delivery failed is shown in the overview – but only if the other end answers at all.

16. The interface (API)

mmDial has an HTTP interface. With it your own system works directly with the data in mmDial, without anybody exporting something by hand and reading it back in.

16.1 What you can do with it

Area	Among other things
Leads	search, create, edit – search by lead ID, phone number, external lead ID or a field of your own
Export	hand out leads by outcome, plus the history of the automatic exports
Lists	create, edit, list, retrieve a single list
Campaigns	list, retrieve, edit; fetch a campaign's field list
Follow-ups	create a callback, retrieve the callbacks for a lead
Blocklist	add, check, remove and retrieve numbers – globally or per campaign
Reporting	retrieve a campaign's key figures and its live data
Recordings	search by lead ID, phone number or agent, and fetch the file
History	a lead's edit and transfer history, by filter

Together that is more than fifty actions. Which of them you need depends on your system – talk to us and we will name the right ones and the call format.

16.2 Signing in

Two ways are open: with a **user name and password**, or with a **token** sent as `Authorization: Bearer <token>`. The token is the better route: it does not belong to a person who may leave the company, and you can withdraw it on its own without changing a password that is used elsewhere too.

The `authtest` action lets you check that a sign-in works before you build the rest. It answers only on a valid sign-in and names the customer the token belongs to.

16.3 Managing and restricting tokens

> **NOT VISIBLE IN EVERY ACCOUNT**
>
> Token management is enabled for your account. Without it we create the tokens for you on request.

For each token you can record **which actions it may carry out** – one per line. If the list stays empty, it may do everything. If something is in it, every other action is refused and reported to us.

> **TIP**
>
> Create **one token per connected system**, not one for everything, and restrict it to the actions that system really needs. A token that only searches leads can then do only that – and withdrawing it does not mean changing every connection at the same time.

> **CAUTION**
>
> A token is a password. It does not belong in an address, in a log or in a repository – it belongs in the configuration of the connecting system.

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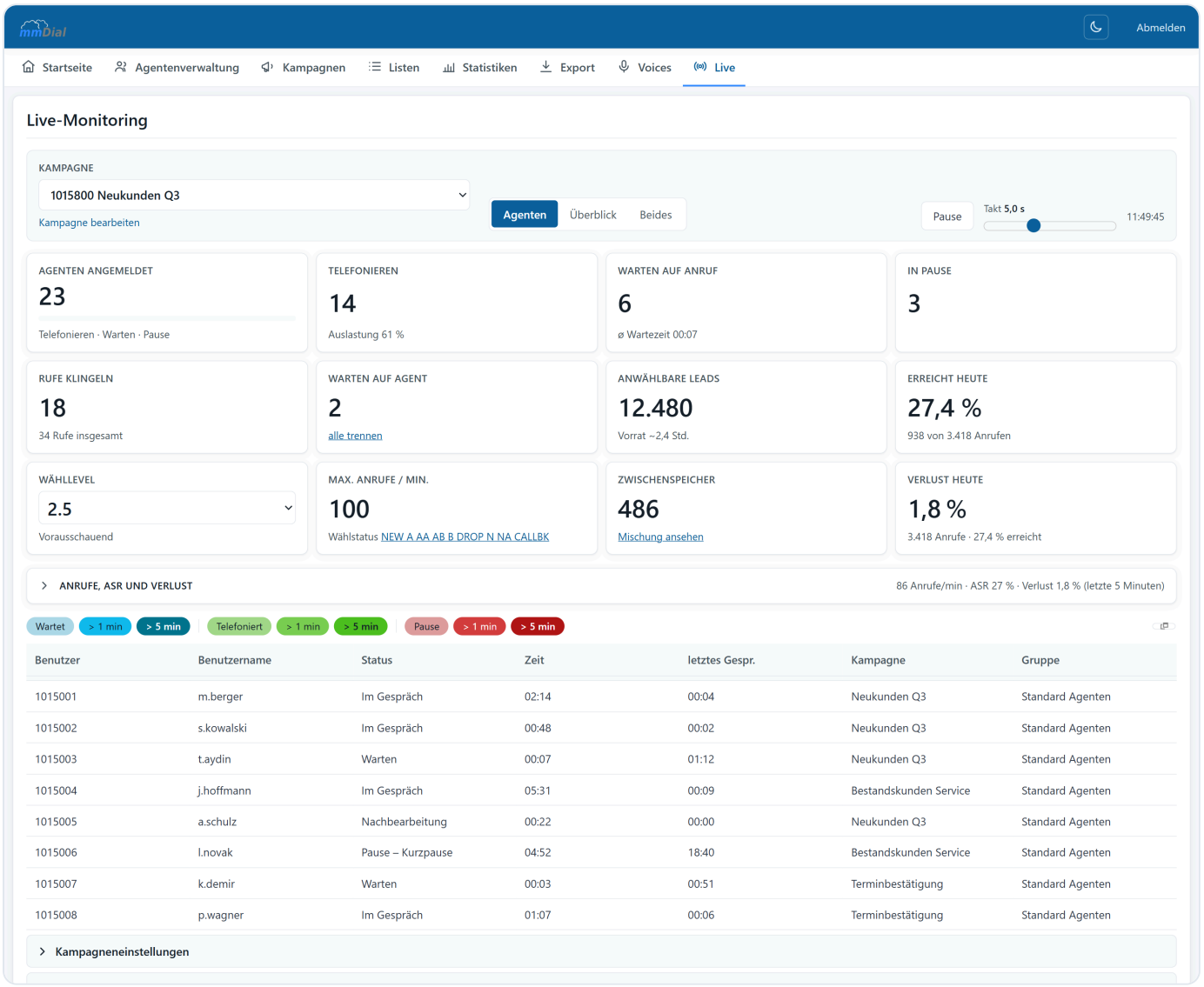
17. Live monitoring



17.1 What you see here

Under **Live** you choose a campaign at the top – or *All campaigns* for the overall view. With the switches beside it you display *Agents*, *Overview* or *Both*. The slider on the right sets the **refresh interval**; *Pause* freezes the view.

17.2 The tiles

Tile	What it means
Agents signed in	Split into on a call, waiting, on a break
On a call	And the utilisation calculated from it
Waiting for a call	With average waiting time
On a break	
Calls ringing	How many dialling attempts are running
Waiting for an agent	People who picked up and are waiting. *Disconnect all* ends those calls
Dialable leads	What is left in the stock, with an estimated supply in hours
Reached today	The day's ASR
Dialling level	Can be changed directly, with the dialling mode below it
Max. calls / min.	The cap, with the call outcomes taken into account below it
Buffer	Preloaded leads. *View the mix* lets you check what it is made up of
Abandons today	In absolute terms and as a percentage

17.3 Intervening during operation

- Change the **dialling level** and the **dialling mode** – takes effect immediately
- Adjust which **call outcomes** are dialled again
- **End waiting calls** if something starts to pile up
- **Empty the buffer** – careful, refilling it takes up to two minutes
- **Sign an agent out after their next call**
- **Lock** or unlock a **workstation**

17.4 The agent table

For each agent you see the user, the user name, the state, how long it has lasted, when the last call was, the campaign and the group. The coloured switches above filter by state and duration – *break > 5 min*, for instance, to find outliers.

17.5 Listening in

> **NOT VISIBLE IN EVERY ACCOUNT**
>
> Listening in is enabled for your account and requires a monitoring account to be set up.

Through the live view, team leaders can listen in on a running call.

> **CAUTION**
>
> Listening in on calls is only permitted under narrow conditions. Your agents have to know about it; for the people called, additional requirements apply. Clear that with your data protection officer beforehand.

18. Statistics

Under **Statistics** you report on what has happened.

18.1 The agent comparison

Choose a comparison figure, a period and the agents, campaigns and groups to include.

Available comparison figures:

- SALEs
- Number of calls
- Call duration, total and average
- Waiting time, total and average
- Break time, total and average
- Break time by reason
- Outcome time, total and average
- Average call time – including campaigns without agents, that is AI campaigns
- Per outcome
- Working hours (login times)

18.2 Campaign and list statistics

From the campaign overview and from list management you call up the outcome distribution: how many leads were reached, not reached, ended up on an answering machine or were completed. That is the basis for judging the quality of your data.

18.3 Trends over time

Calls and ASR can be displayed over time – at resolutions from five minutes to 24 hours.

18.4 Daily figures per campaign

A campaign's key figures – calls, agents, peak values – always apply to *now*. At the change of day they are reset; anyone who wanted to look up the next morning how yesterday went found nothing left.

mmDial therefore saves those values every night, before the change of day deletes them. In the statistics you find them as **daily figures** and can view several days side by side.

> **NOTE**
>
> What is saved is what stands there in the evening. A campaign that carried on calling after the save appears with the earlier state.

18.5 Calls by hour

Beside the daily figures sits the **hourly report**: all twenty-four hours of a day one below the other, with the calls per hour, how many of them connected and at what rate, who held the conversation – agent or AI – the abandons, the call time and the average per call, plus manual and incoming calls. Above it a bar chart and the busiest hour.

It answers the questions that daily figures cannot: whether the early afternoon is worth it, whether the answer rate really collapses after 5 p.m., and whether yesterday ran differently from today.

> **NOTE**
>
> At most **two days** can be viewed at once – one to look at, one to compare against. If you choose more, the page shows two and says so. For longer periods, use the daily figures.

Connected here means: the call had a call duration. That is read from the data rather than from a list of outcomes – for AI campaigns such a list would be a different one anyway.

18.6 Print view

The *Print view* button produces a tidy version without the navigation that prints cleanly or can be saved as a PDF.

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19. Recordings

> **NOT VISIBLE IN EVERY ACCOUNT**
> Call recording is enabled for your account. If it is not active, the whole area is missing from the navigation.

19.1 Switching recording on

Whether recording takes place is set per campaign:

- **permanently** – every call is recorded
- **controlled by the agent** – the agent starts and stops it themselves

You can additionally set whether only the agent channel is recorded and whether the recording starts with a delay.

19.2 Finding recordings

Under **Voices** you search the recordings:

- **Quick search** by file name or phone number
- **Advanced search** by campaign, period, length and further characteristics
- From a hit you jump to the associated lead

19.3 Determining the file names yourself

Under **Schemes** you define what recordings are called. The building blocks available include first name, surname, phone number, lead ID, external lead ID, campaign, list, date, time and agent ID.

A scheme can be saved and reused for further campaigns. If a client changes their requirements, you adjust the scheme instead of renaming files.

19.4 Downloading

- **Download all** pulls the hits as a package
- **Download result file** delivers the list of hits as a file
- A filter can be applied to the result file

CAUTION

Recording telephone calls is only permitted if everyone involved knows about it and has consented. mmDial provides the technology; you are responsible for lawful use – the notice announcement, consent and retention periods.

20. Export

20.1 Creating an export

1. **Export → Exports**
2. Choose the **campaign**
3. Drag the fields you want from the **customer data fields**, **order form fields** and **other** areas over to *Selected fields*
4. Set the order by moving them
5. Set the period and filters
6. Start the export and download the file

20.2 Export templates

Once you have assembled a format, save it as an **export template**. Next time you load it and start straight away. You edit templates under **Export → Edit export templates**.

20.3 Useful additional fields

Besides the master data, the following are available among others: import time, last edit, last call, call outcome, agent ID and the fields of your order form.

20.4 Encoding

Choose the encoding to match the target system – `ISO-8859-1`, `Windows-1252` or `UTF-8`. When in doubt, ask your client; that saves returns because of mangled accented characters.

20.5 Supplying recordings with the export

Using *load associated voice files* you get the matching recordings alongside the records exported.

20.6 Connection data

Under **Export → Connection data** you pull the technical connection data – useful for billing and for records.

21. Media, account and support

21.1 The media system

Under **Media** you manage audio files: announcements, on-hold music, mailbox announcements and voices for AI campaigns. You upload files and then refer to them from the campaign or inbound settings.

21.2 Credit and invoices

- **Show credit** – the current balance of your prepaid credit
- **Invoices** – your invoices, available for download

If the credit runs low, the system speaks up before a running campaign comes to a halt.

21.3 The admin log

> **NOT VISIBLE IN EVERY ACCOUNT**
> The admin log is not available in every account.

The **admin log** records changes in the administration – who changed what and when. With several administrators it is the quickest answer to "who changed that?".

21.4 Support

You reach our support through the ticket form in the interface or through mmdial.de/kontakt.php (https://www.mmdial.de/kontakt.php) or by email at service@mmdial.de. By phone: **+49 241 927 89 88 0**, Monday to Friday, 9 a.m. to 4 p.m.

You will find the system status and fault reports at status.mmdial.de (https://status.mmdial.de).

22. Appendix

22.1 Your first campaign in ten minutes

1. **Create an agent** – Agent management → Create agent
2. **Create a campaign** – Campaigns → New campaign, give it a name
3. **Set the dialling behaviour** – to begin with: dialling mode *Manual*, with a suitable time window
4. **Upload a list** – Lists → Upload list, choose the campaign, drop the CSV, map the fields, start the import
5. **Activate the list** – Lists → Show all lists, set the list to *Active*
6. **Activate the campaign** – in the campaign settings, set *Active* to *Yes*
7. **Have an agent sign in** and make a test call
8. **Open the live view** and watch

Once that works, switch the dialling mode to *Predictive* and keep an eye on the abandon rate and the ASR.

22.2 Common pitfalls

Symptom	Usual cause
No dialling takes place	The campaign or list is set to inactive, or the time window is closed
The campaign gets no leads	All leads have an outcome that is not dialled again – check the dialling rules
The agent cannot sign in	The account is inactive, was created as *Administration only*, or the quota of simultaneous agents is used up
Accented characters mangled on import	The wrong file encoding was chosen
The list cannot be deleted	The list is still active or archived
A menu entry from this manual is missing	The function is not enabled for your account – see the chapter *Not every account sees the same thing*
High abandon rate	The dialling level is too high or there are too few agents for predictive dialling
Agents wait a lot	The dialling level is too low or the stock is hard to reach

22.3 Terms

Term	What it means
ASR	Answer Seizure Ratio – the share of dialling attempts that lead to a conversation with an agent
ACD	Automatic Call Distribution – the distribution of answered calls to free agents
CLIP	The number displayed to the person called
DNC	Do Not Call – the blocklist
Drop / abandon	Somebody picks up but no agent is free
Lead	A single address record
Overdial factor	How many lines are occupied per agent at once
Dialling level	The overdial factor currently in use
Buffer	Preloaded leads that the dialler draws from

22.4 Further documents

Supplementary manuals for the areas split out:

- *Supplement – Inbound* – incoming calls, call blending, voice menus, queues and voicemail
- *Supplement – Workstations* – managing agents and workstations separately

Further manuals:

- *Manual for agents* – the interface your agents use
- *mmDial Basic manual* – the lean administration of the entry plan

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