MMDIAL BASIC

mmDial Basic manual

The administration of the entry plan – campaigns, lists, agents, reporting

Version	**1.3.3**
Updated	**2026-11-03**
Published by	**mm-infotec GmbH, Theaterstr. 70-74, 52062 Aachen · service@mmdial.de**

The current edition is always available at mmdial.de/handbuecher.php (https://www.mmdial.de/handbuecher.php).

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1. About this manual

This manual describes the **administration of mmDial Basic** – the entry plan without a base fee. You sign in at `logindialer.direkt.mmdial.de`.

mmDial Basic contains the complete predictive dialler. You create campaigns, load address lists, manage agents, steer operation live and report on it. The administration is deliberately leaner than that of **mmDial Pro**; which functions are additionally available there is set out in the chapter *What mmDial Pro can do in addition*.

1.1 Who is this manual for?

For everyone who administers mmDial Basic. Anybody making calls as an **agent** works in a different interface – the *Manual for agents* covers that.

> **NOTE**
>
> The screenshots in this manual come from the Pro interface, because both use the same design. The structure is identical; individual menu entries are missing in mmDial Basic.

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 Supplementary manual

One area has been split out because only some customers need it:

- **Supplement – Workstations** – managing agents and workstations separately

2. Not every account sees the same thing

One important point up front: **mmDial does not look the same for all customers.** If a menu entry described here is missing for you, that is as a rule not a fault.

2.1 Three levels decide what you see

Level	What depends on it
Your plan	mmDial Pro contains considerably more than mmDial Basic – see the last chapter
Your enabled features	Individual additional functions are activated per customer, call recording for instance
The campaign	Some things are switched on and off per campaign, such as manual dialling or transfers

Sections that are not available in every account are marked 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.

3. First steps

3.1 Signing in

Go to `https://logindialer.direkt.mmdial.de` and sign in with your user name and password. You received both by email after registering.

> **CAUTION**
>
> The administration login is not the same one that agents use to sign in. Agents have accounts of their own, which you create yourself.

3.2 The layout of the interface

- **The blue bar at the top** with the logo, the switch between light and dark design and *Sign out* (*Abmelden*)
- **The main navigation below it**: home page, agent management, campaigns, lists, statistics, export, Voices, Live
- **The submenu on the left**, matching the area chosen
- **The working area on the right**

3.3 What the home page shows

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

The home page submenu leads to the most common tasks: create a campaign, create an agent, search for a lead, search for a recording, show credit.

4. Agents

Before anybody can make calls, they need an agent account. Everything to do with that is under **Agent management** (*Agentenverwaltung*).

4.1 The overview

At the top you find the number of agents created and active, plus your available quota.

> **NOTE**
>
> An agent account costs nothing in mmDial Basic. The only limit is how many agents may be signed in **at the same time**.

4.2 Creating an agent

1. **Agent management → Create agent**
2. Enter the name and login details
3. Set the state to *active*
4. Grant permissions
5. Save

4.3 Permissions per agent

Permission	Effect
Lead search	*Not permitted*, *Search within the campaign* or *Search across all campaigns*
Delete lists	Normally off
List exports	Allows the agent to pull exports
Listen to recordings	Access to the call recordings
Administration only	The account cannot sign in to the agent desk

4.4 An agent's follow-ups

Under **Agent's callbacks** (*Callbacks des Agenten*) you see which callbacks a particular agent has arranged and can move them if needed.

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**.

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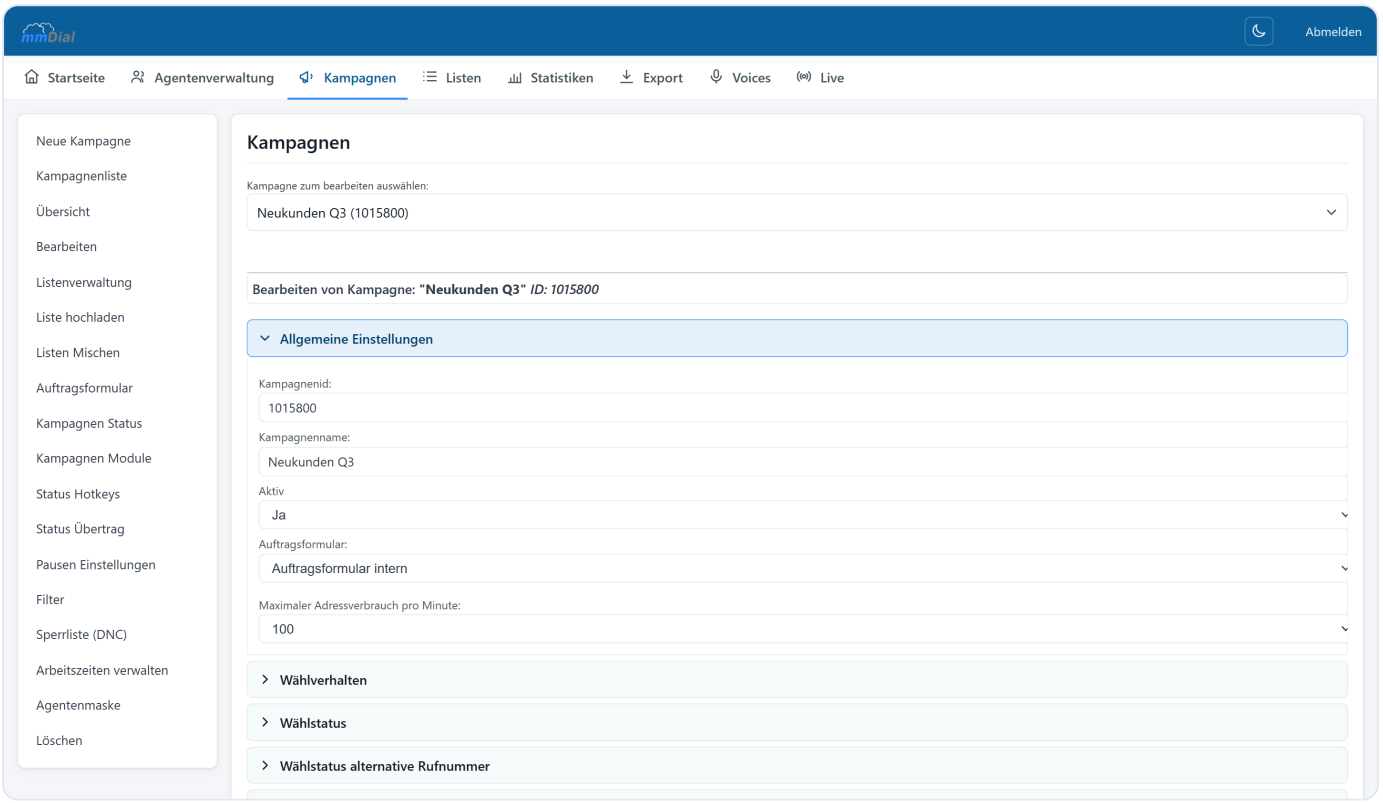
5. Campaigns

The campaign brings together address lists, agents, dialling behaviour, call outcomes and the number displayed.



5.1 Creating a campaign

1. **Campaigns → New campaign**
2. Give it a meaningful name
3. Save
4. Work through the settings

The **campaign ID** is assigned by the system and appears in exports, statistics and file names.

5.2 The campaign submenu

Entry	What for
New campaign	Create a campaign
Campaign list	All campaigns
Overview	Key figures and the campaign's lists
Edit	The settings page
Live view	Straight into the monitoring of this campaign
Blocklist (DNC)	Numbers in this campaign that must not be called
Delete	Remove the campaign

5.3 General settings

Field	What it means
Campaign name	Freely chosen
Active	If this is *No*, no dialling takes place
Maximum records used per minute	A cap on the number of records dialled

5.4 The areas of the settings page

- **General settings**
- **Dialling behaviour**
- **Call outcomes**
- **Further settings**

> **CAUTION**
>
> A campaign can only be deleted when it is not active and no active lists are attached to it any more.

6. Dialling behaviour

6.1 The dialling mode

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

With predictive dialling you set the **dialling level** – fixed or automatic.

6.2 The automatic levels

Level	Behaviour
Average	Cautious, few abandons
Aggressive	Higher utilisation, more risk
Strict	Maximum utilisation, only with a good stock of records

6.3 The abandon rate

An **abandoned call** arises when somebody picks up and no agent is free.

- **Maximum abandon rate** – the limit that mmDial keeps to
- **Drop call after (seconds)** – how long the person called waits

> **CAUTION**
> Keep the abandon rate low. A high value brings more conversations in the short term, but also complaints and legal problems.

6.4 Redialling and time windows

- **Redial after** – the waiting time before the next attempt
- **Maximum number of attempts** – after which the lead rests

- **Working hours (automatic dialling only)** – when dialling is permitted. Ready-made templates and a freely adjustable window are available

> **CAUTION**
>
> Keeping to the permitted calling hours is your responsibility. mmDial implements technically what you set.

6.5 Caller ID and detection

- **CLIP number** – which number appears at the other end
- **Live-person detection** – recognises answering machines and sorts them out
- **On-hold music** – what the person called hears until the agent takes over

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7. Call outcomes

At the end of every call the agent sets an outcome. The reporting, the follow-ups and the export all arise from it.

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

In the **Call outcomes** area of the campaign settings you decide which outcomes are in circulation and which are dialled again.

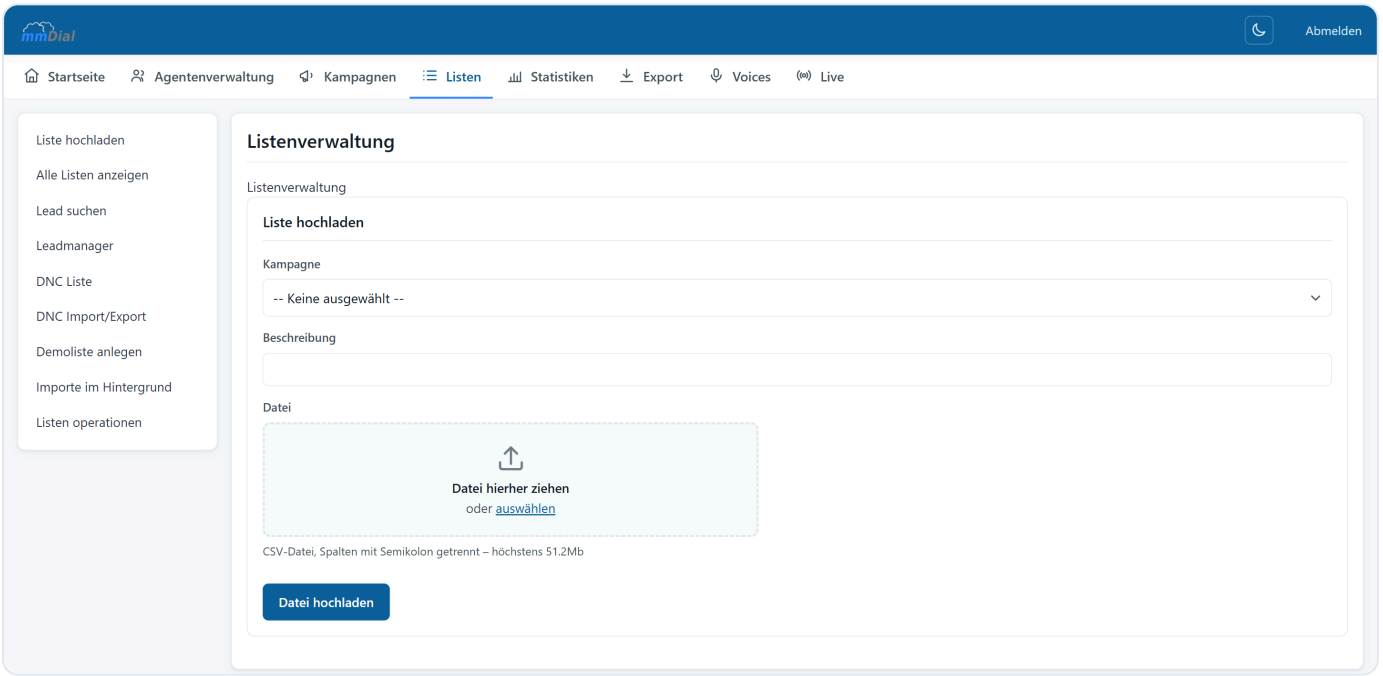
> **MMDIAL PRO ONLY**
>
> Your own outcomes per campaign, outcome hotkeys and automatic outcome forwarding into other campaigns belong to mmDial Pro.

8. Lists and leads

8.1 The three levels

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

8.2 Uploading a list



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

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

8.3 Mapping fields

After uploading you see a preview. Drag the **customer fields** from the list on the right onto the matching columns:

Field	Note
Phone number	Mandatory field
Phone number (area code) / (number)	If supplied split
Alternative phone number	A second number
Title, first name, surname	
Company name	
Street, house number, postcode, town	
Country (code)	Two-letter code
Date of birth	
Additional, notes	Free-text fields
External lead ID	Yours or your client's ID

8.4 Import settings

Setting	Effect
Duplicate check within the campaign	Skip numbers that already exist in this campaign
Duplicate check across all campaigns	The same across your whole stock
Filter invalid phone numbers	Sort out obviously unusable numbers
Area code for the list	Add a fixed area code
File encoding	ISO-8859-1, Windows-1252 or UTF-8
Lead status	The starting outcome, 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.

8.5 Managing lists

You will find a campaign's lists in the **campaign overview**. There you have each list's name, status and lead count, and you can:

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

> **CAUTION**
>
> An active or archived list cannot be deleted. Deactivate it or retrieve it from the archive first.

8.6 Finding a single lead

Lists → **Search lead** searches your stock by phone number, name or lead ID. In the result you see the record together with its call history and can edit, move, block or delete it.

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9. Blocklist (DNC)

Numbers that must no longer be called belong on the blocklist. In mmDial Basic you maintain it **per campaign** under **Campaigns → Blocklist (DNC)**.

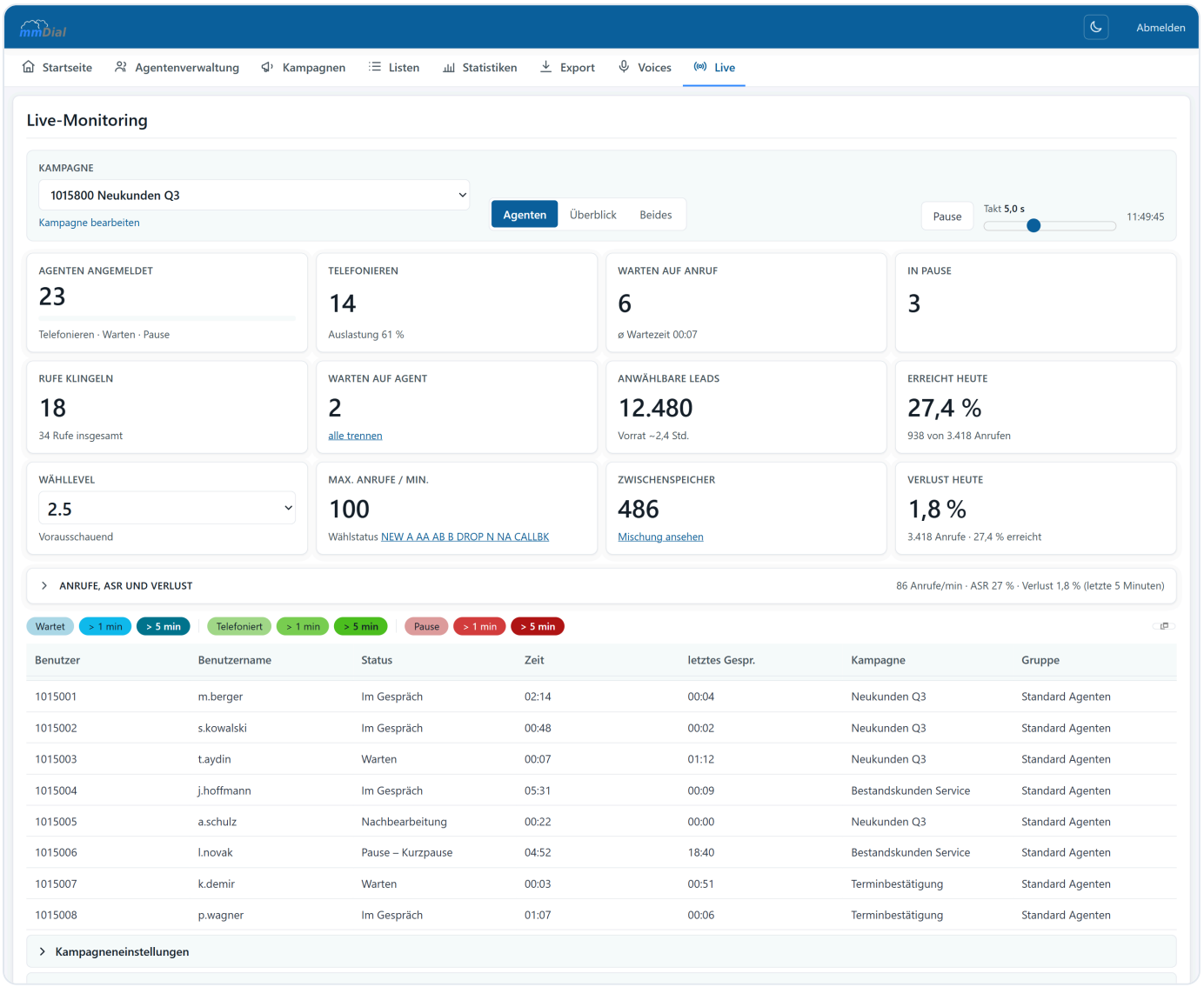
- Add individual numbers
- Show leads that are already blocked
- Remove entries

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

> **MMDIAL PRO ONLY**
>
> A **global** blocklist across all campaigns – including importing and exporting whole blocklists – belongs to mmDial Pro.

> **CAUTION**
>
> Objections to marketing calls have to be implemented reliably. Enter a blocked number in **every** campaign in which it can occur.

10. Live monitoring



10.1 What you see here

Under **Live** you choose the campaign at the top. The slider on the right sets the refresh interval; *Pause* freezes the view.

Tile	What it means
Agents signed in	Split into on a call, waiting, on a break
On a call	With calculated utilisation
Waiting for a call	With average waiting time
On a break	
Calls ringing	Dialling attempts in progress
Waiting for an agent	People who picked up and are waiting
Dialable leads	What is left in the stock
Reached today	The day's ASR
Dialling level	Can be changed directly
Max. calls / min.	The cap
Buffer	Preloaded leads
Abandons today	In absolute terms and as a percentage

10.2 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
- View and empty the **buffer**

10.3 The agent table

For each agent you see the user, the state, how long the state has lasted, the last call and the campaign. The switches above filter by state and duration.

11. Statistics

Under **Statistics** the following are available to you:

- **Agents** – a comparison of individual agents over a period
- **Agent overview** – the overall picture of your team

Choose a comparison figure, a period and the agents and campaigns to include. You call up the outcome distribution of a campaign or list from the campaign overview.

> **MMDIAL PRO ONLY**
>
> Reporting at five-minute resolution, working-time and break-time statistics, and inbound reporting belong to mmDial Pro.

12. 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.

12.1 Switching recording on

Whether recording takes place is set per campaign – permanently or controlled by the agent. If the agent starts and stops it themselves, they are shown clearly during the recording that recording is in progress.

12.2 Finding recordings

Under **Voices**:

- **Daily overview** – what was recorded today
- **Search recording** – search by file name, phone number, campaign and period
- **Answering machine** – only appears when a mailbox is set up for your account

Hits can be listened to and downloaded as a package.

> **MMDIAL PRO ONLY**
> Freely composed file-naming schemes and searching within the call content belong to mmDial Comfort.

> **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.

13. Export

Under **Export** you choose the campaign and assemble the export: select fields, set the order, set the period and filters, download the file.

Watch the **encoding** – `ISO-8859-1`, `Windows-1252` or `UTF-8`, to match your client's target system.

Individual lists can additionally be exported straight from the campaign overview.

> **MMDIAL PRO ONLY**
>
> Saveable export templates, merging master data with order-form data, and automatic export on a schedule belong to mmDial Pro.

14. Credit, invoices and support

14.1 Credit

In mmDial Basic, telephony runs on **prepaid credit**. Under *Show credit* you see the balance, under *Top up credit* the bank details for topping up.

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

14.2 Billing documents

You will find your invoices and records under **Billing documents**.

14.3 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.

System status and fault reports: status.mmdial.de (https://status.mmdial.de).

15. What mmDial Pro can do in addition

mmDial Basic and mmDial Pro use the same dialler core and the same telephony. The difference lies in the scope of the administration. These functions come with mmDial Pro:

Area	Additional in mmDial Pro
Agents	Groups with their own campaign permissions, group administrators
Campaigns	Your own call outcomes, outcome hotkeys, outcome forwarding, copying a campaign, colour and short code, break reasons, automatic dialling rules, working-hours management
Lists	List mix, the filter builder for selective feeding, the lead manager for enrichment, alternative numbers per lead, callback history
Blocklist	A global blocklist with import and export
Agent desk	Order forms with a form editor of your own, sending documents and emails, add-on modules, lead editing by the agent
Inbound	Inbound campaigns, call blending, voice menus, queues, voicemail, VIP routing
AI	AI Agent Live – the AI runs the conversation
Monitoring	Overall view, agent utilisation, locking a workstation, signing an agent out
Statistics	Five-minute resolution, working and break times, inbound reporting, daily figures saved overnight
Recordings	Your own file-naming schemes, searching within the call content, recording the agent channel only
Export	Export templates, master and order data combined, automatic export, HTTP API
Interfaces	HTTP API: search, create, edit leads and export them by outcome, plus lists, campaigns, blocklist and recordings. Sign-in by token, each token restrictable to particular actions. Plus notifications to addresses of your own on outcome changes and lead edits

Switching is possible at any time, without losing campaigns, lists or reports. Talk to us. (https://www.mmdial.de/kontakt.php)

16. Appendix

16.1 Your first campaign in ten minutes

1. **Create an agent** – Agent management → Create agent
2. **Create a campaign** – Campaigns → New campaign
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** – in the campaign overview
6. **Activate the campaign** – in the 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 to *Predictive* and keep an eye on the abandon rate and the ASR.

16.2 Common pitfalls

Symptom	Usual cause
No dialling takes place	The campaign or list is inactive, or the time window is closed
The campaign gets no leads	All leads have an outcome that is not dialled again
The agent cannot sign in	The account is inactive or the quota of simultaneous agents is used up
Accented characters mangled on import	The wrong file encoding
The list cannot be deleted	The list is still active or archived
High abandon rate	The dialling level is too high or there are too few agents
Agents wait a lot	The dialling level is too low or the stock is hard to reach
Credit used up	Top it up; the system warns beforehand
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*

16.3 Terms

Term	What it means
ASR	The share of dialling attempts that lead to a conversation with an agent
ACD	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
Dialling level	How many lines are occupied per agent at once
Buffer	Preloaded leads that the dialler draws from

16.4 Further documents

- *Supplement – Workstations* – managing agents and workstations separately
- *Manual for agents* – the interface your agents use
- *mmDial Pro manual* – the full range of features

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mmDial Basic manual · Version 1.3.3 · Updated 2026-11-03

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