MMDIAL PRO · ADDITIONAL FEATURE

Supplement – Inbound

Incoming calls, call blending, voice menus, queues and voicemail

Version	**1.0.3**
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 **inbound operation** in mmDial: taking incoming calls, mixing them with outbound work (call blending), voice menus, queues, voicemail and priority treatment for particular callers.

It is deliberately a booklet of its own. The inbound part is extensive but not everyone needs it – anyone working purely outbound will find everything necessary in the main manuals and does not have to deal with this one.

> **NOT VISIBLE IN EVERY ACCOUNT**
>
> Inbound is an **additional feature and is enabled for your account**. If you cannot find the menu entries described here, inbound is not active for you.
>
> Whether inbound is available **depends on your plan** – it is not automatically included in the standard plans. Talk to us; we will work out with you what is needed in your case.
>
> Even within the inbound part there are stages: voice menus, voicemail and priority caller treatment are enabled separately. So it may be that you can see inbound campaigns while individual chapters below do not apply to you.

1.1 Prerequisites

- You work with **mmDial Pro**. There is no inbound operation in mmDial Basic
- Inbound is enabled for your account
- You have at least one **incoming phone number** routed to your system

1.2 What to read first

This manual assumes that you are familiar with campaigns, agents and live monitoring. If you are not: read the *mmDial Pro manual* first.

2. What call blending means

Call blending means: **your agents make outbound calls and take incoming calls at the same time.** You need neither a second team nor a second interface for it.

2.1 How it works

1. Your agents are working in an outbound campaign
2. Somebody calls one of your numbers
3. The call is put through **before** the next outbound call starts
4. If the caller is a known lead, the agent immediately sees their data and history
5. After the call the agent goes back to the outbound campaign as usual

Incoming calls therefore take **precedence** over automatic dialling. That is intended: somebody calling you has a reason to and should not have to wait.

2.2 Why that makes the difference

If you call out, you get return calls – people who missed the call or want to call back. Without inbound they end up nowhere. With inbound they reach an agent who knows their history.

The agent does not have to ask for the name and the reason for the call. That shortens the conversation and comes across as considerably more professional to the caller.

3. Creating an inbound campaign

Inbound campaigns are campaigns in their own right. You create them like an outbound campaign, but choose the corresponding type.

1. **Campaigns → Inbound campaigns**
2. Create a new inbound campaign and give it a name
3. Work through the settings (see below)
4. Assign agents

3.1 The most important settings

Setting	What it means
General settings	Name, state, description
Agents in the campaign	Who may take calls from this campaign
Agent who answers first	The order in which agents ring
Number of agents / active agents	Shows you how many are currently available
Announcements and on-hold music	What the caller hears while waiting
Reject call	When a call is turned away
Action at the queue limit	What happens when too many are waiting at once
Action when no agent is available	What happens when nobody is signed in
Working hours	When this campaign takes calls at all
Reporting	How the calls are counted in the statistics

> **TIP**
> Create a separate inbound campaign for each client and each phone number. That way you can report cleanly afterwards on who received how many calls.

4. The queue

When more people call than there are free agents, a queue forms. What happens there is up to you.

4.1 Announcements and on-hold music

Store a welcome announcement and on-hold music. You upload both to the media system beforehand and then refer to them from the inbound campaign.

> **TIP**
>
> A short announcement that greets the caller and asks them to bear with you noticeably reduces the abandonment rate. Silence sounds like a dead line.

4.2 Setting limits

Define **how many callers may wait at the same time**. If the limit is exceeded, the action you chose applies:

Action	When it makes sense
Forward	You have a fallback number, such as a switchboard
Send to voicemail	The caller can leave a message
Hang up	Only as a last resort – unsatisfying for the caller

The same possibilities apply for the case where **no agent at all is signed in**.

> **CAUTION**
>
> Check the *no agent available* setting particularly carefully. It also applies when your team is all at lunch together – and experience shows that is exactly when a lot of people call.

4.3 Working hours

For each inbound campaign you record the times at which it takes calls. Outside those times the fallback action you have stored applies as well – usually an announcement with your opening hours followed by voicemail.

5. Voice menu

> **NOT VISIBLE IN EVERY ACCOUNT**
> Voice menus are enabled separately.

A voice menu takes the call, plays an announcement and branches according to the key pressed – "press 1 for sales, 2 for service".

5.1 Building a menu

1. Open **Voice menus** and create a new menu
2. Give it a **description** so that you can find it again later
3. Store the **announcement** – you upload the file to the media system beforehand
4. Create the **menu options**: which key leads where
5. Set the **timeout for the choice** in seconds
6. Decide on the **repeat attempts** – how often the announcement is repeated
7. Define the behaviour when **nothing is entered**

5.2 Possible destinations for a menu option

- an **inbound campaign** – the usual case
- a **forward** to another phone number
- the **answering machine**
- **hang up**

5.3 Assigning the inbound number

In the menu you record which incoming number it applies to. That way several numbers can get different menus.

> **TIP**
> Keep menus flat. Two levels are almost always too many. Anyone who has to press a key three times before a human answers hangs up first.

6. Voicemail

> **NOT VISIBLE IN EVERY ACCOUNT**
> Voicemail is enabled separately.

The mailbox records when nobody can be reached – outside working hours, when the queue is full, or when a voice menu has it as its destination.

6.1 Setting it up

1. Open **Voicemail**
2. Make the general settings
3. Store the **announcements**

6.2 Retrieving recordings

You will find the recorded messages in the same place as the call recordings, in the **Voices** area under the entry for the answering machine. From there they can be listened to and downloaded.

> **TIP**
> Decide who listens to the mailbox and when, and put it in writing. A mailbox nobody listens to is worse than no mailbox.

7. Priority callers

> **NOT VISIBLE IN EVERY ACCOUNT**
> Priority treatment for particular callers is enabled separately.

Particular phone numbers can be given priority and put through to a specific campaign or a specific agent – existing customers with a service contract, for instance, or the contacts at your client.

For that you store the phone numbers and the destination you want. When one of those numbers calls, the normal queue logic does not apply.

8. Incoming phone numbers

We route incoming numbers to your campaigns through our telephony partners. You can operate several numbers in parallel – one per client, for example.

Talk to us if you need an additional number or if an existing one should be routed to a different campaign or voice menu.

> **NOTE**
>
> The number you show on **outbound** calls and the number on which you can be reached **inbound** should match. Otherwise people call back on a number that nobody answers.

9. Reporting

9.1 Inbound statistics

> **NOT VISIBLE IN EVERY ACCOUNT**
>
> The inbound statistics only appear when inbound is active for your account.

Inbound operation is reported separately from outbound. Among other things you see:

- answered and lost calls
- waiting times
- the distribution across your inbound campaigns

9.2 Call list

A list of incoming calls shows you who called when and what came of it – including calls that nobody answered. That lets you call back deliberately.

9.3 Live monitoring

In the live view, inbound campaigns can be watched just like outbound ones. You switch between them using the campaign selection at the top.

10. For agents in inbound campaigns

What changes for your agents is manageable – but it is worth mentioning once.

10.1 What is different

- An incoming call can arrive **at any moment**, even in the middle of a quiet spell
- For known callers the customer data is there immediately – the agent should look at it before speaking
- For unknown callers the record is empty and has to be created
- Using *Take call*, the agent picks up a waiting call from the queue

10.2 What stays the same

Setting outcomes, filling in the order form, creating follow-ups, taking a break – it all works as in outbound operation. The corresponding chapters in the *Manual for agents* apply unchanged.

> **TIP**
>
> Tell your team beforehand that incoming calls take precedence. Otherwise a call ringing suddenly in the middle of an outbound campaign feels like an interruption – when in fact it is the more valuable contact.

11. Appendix

11.1 Set it up in this order

1. Sort out the **phone number** – which number should end up where
2. **Record the announcements** and upload them to the media system
3. Create the **inbound campaign** and assign agents
4. Store the **working hours**
5. Set up the **queue**: the limit and the fallback actions
6. Set up **voicemail**, if you have it
7. Build the **voice menu**, if several destinations are needed
8. Make a **test call** from a mobile – including outside working hours
9. Inform the team

11.2 Common pitfalls

Symptom	Usual cause
Callers hear nothing	No announcement or on-hold music stored
Calls do not arrive	The campaign is inactive, it is outside working hours, or no agent is assigned
All calls go straight to the mailbox	No agent signed in – the fallback action applies
The agent sees no customer data	The caller is not in the system as a lead
Nobody answers after hours	No fallback action set for "no agent available"
The voice menu does not react to keys	Menu options are missing or the timeout is too short

11.3 Further documents

- *mmDial Pro manual* – the administration as a whole
- *Manual for agents* – the desk your agents work at

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