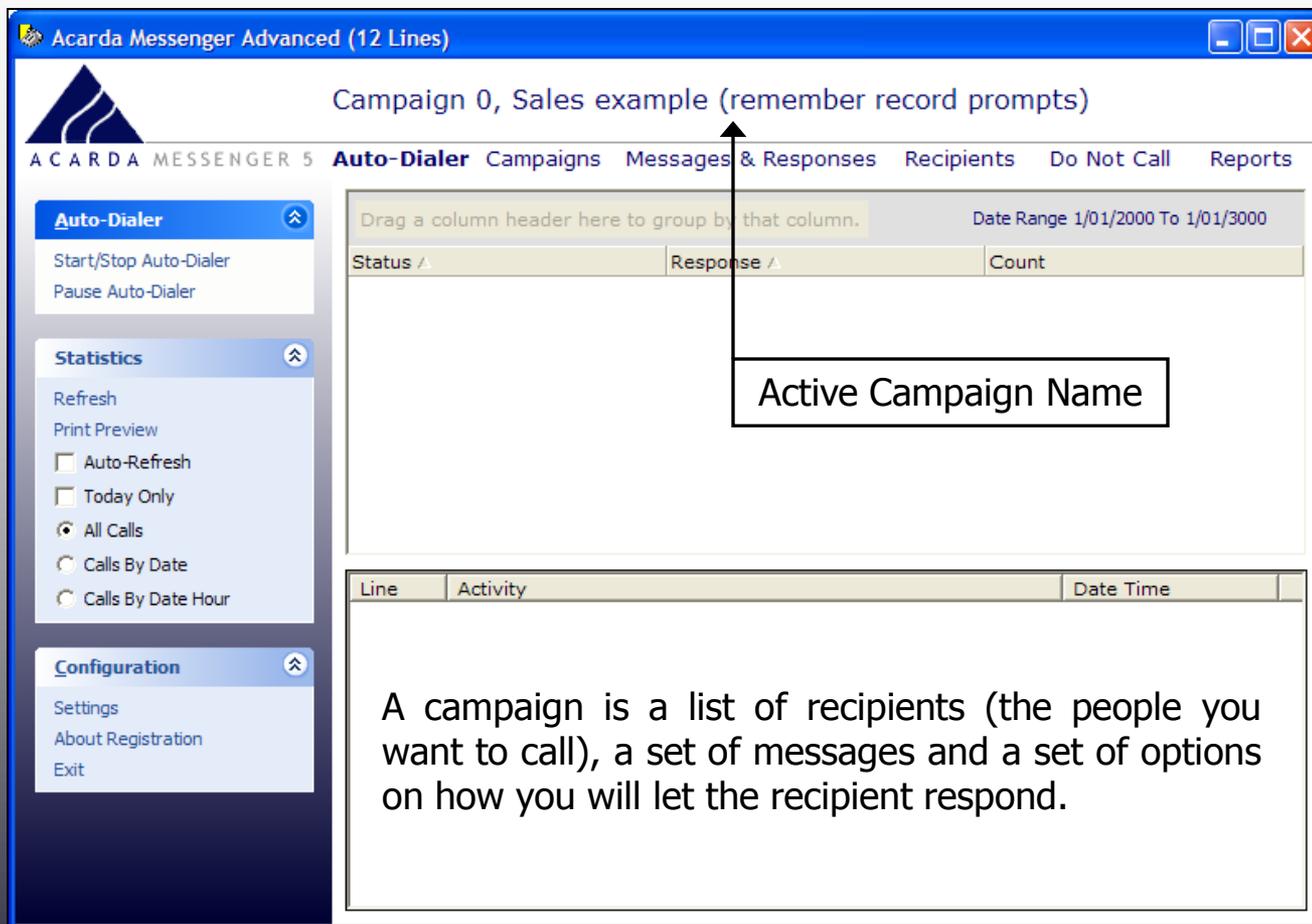# Acarda Messenger Auto-Dialer Training Presentation

This presentation will give you an overview
of how to set up and configure Acarda Messenger version 5 &6.

Acarda Messenger auto-dialer automatically phones a list of people and plays them a message about your product or service. To start Acarda Messenger, double click on the Acarda Messenger icon found on your desktop.

To name a campaign click on the Campaigns in the navigation bar or click the name of the active campaign.
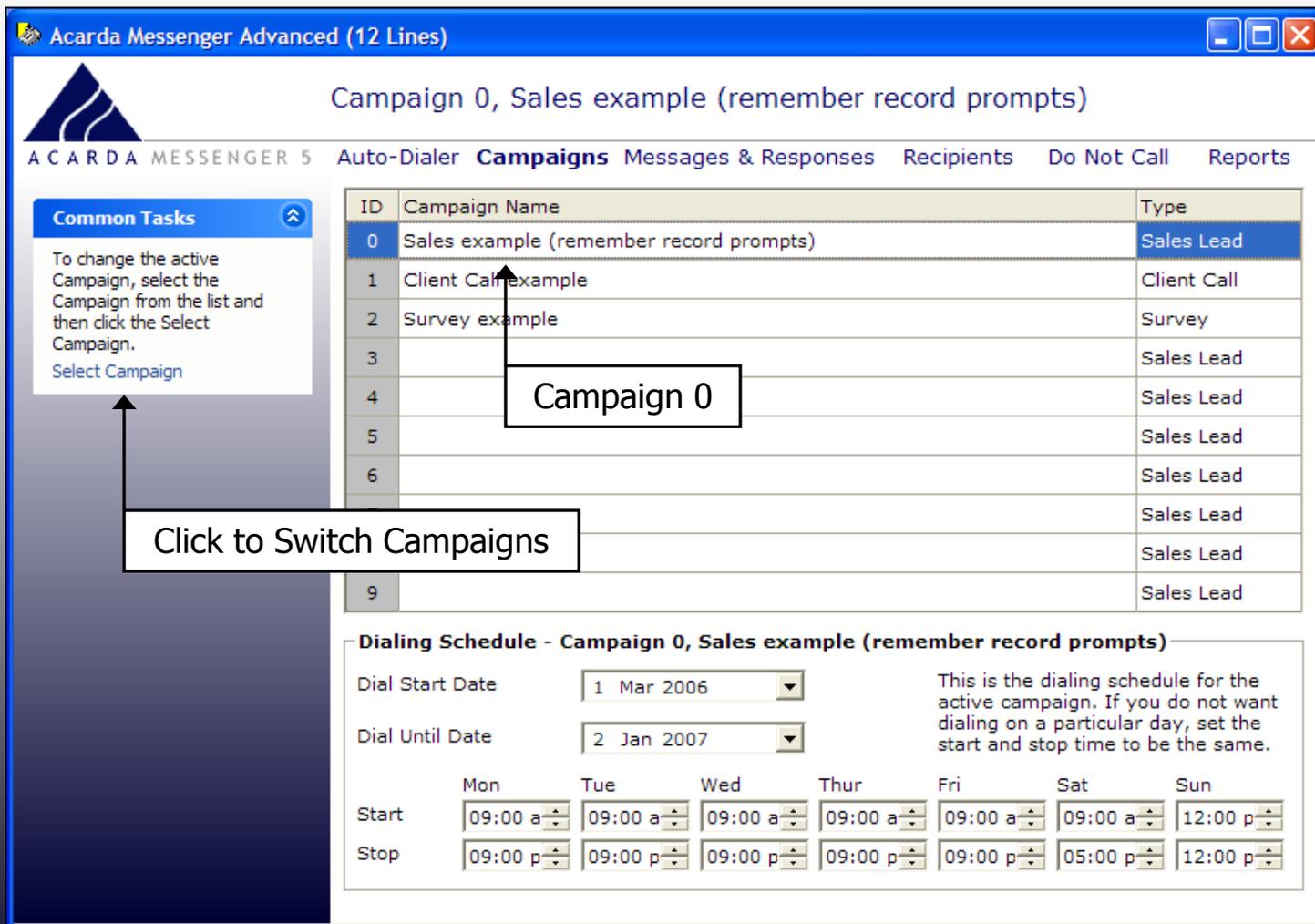
Active Campaign Name

A campaign is a list of recipients (the people you want to call), a set of messages and a set of options on how you will let the recipient respond.

There are 10 campaigns that can be used (Campaign 0 - Campaign 9). The Campaign is named by simply typing in the name. We will just be focusing on the first one (Campaign 0). Select Campaign 0 then click the Select Campaign in the sidebar.

The Dialing Schedule is located on the Campaigns screen along with the campaign selection. **You must first select the active campaign to configure the Dialing Schedule for that campaign.**

The dialing schedule sets the date and time to dial between, so once started the auto-dialer starts and stops automatically.

If there is a day in the week that you do not want to dial on (for example Sunday) then set the same start and stop time for that day.

ACARDA SALES TECHNOLOGIES
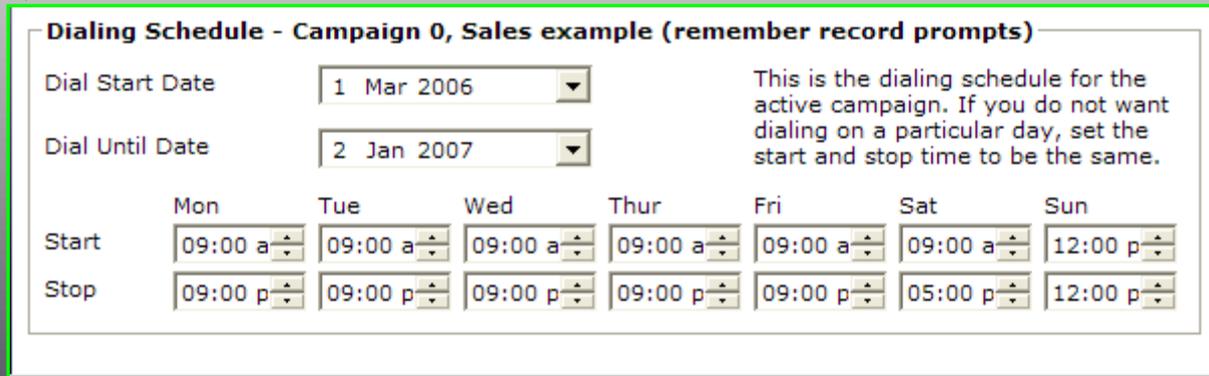
The message and responses screen is where you select the structure of the call and what messages you want to play to a recipient.

The new Prompt Test allows you to preview your recorded prompts over the default sound card.

Prompt Test

☐ Show All Prompts

Answer Machine	4014
Main Message	4006
Response (No Tsf)	4009
Interested Msg	4011

Play   Stop

Clicking show all prompts will show all the prompts availible in that campaign type.

Displays the list of prompts enabled for the campaign type.

Acarda Messenger Advanced (12 Lines)

Campaign 0, Sales example (remember record prompts)

ACARDA MESSENGER 5   Auto-Dialer   Campaigns **Messages & Responses** Recipients   Do Not Call   Reports

Prompt Test

☐ Show All Prompts

Answer Machine	4014
Main Message	4006
Response (No Tsf)	4009
Interested Msg	4011

Play   Stop

Get Correct Person ☐
- ☐ Message About Message (4000)
- ☐ Is This You Message (4001)
- ☐ I'll Wait Message (4002)
- ☐ Call Back Time Message (4003)
- ☐ Goodbye Message (4005)

Sales Message
- ☑ Main Message (4006)

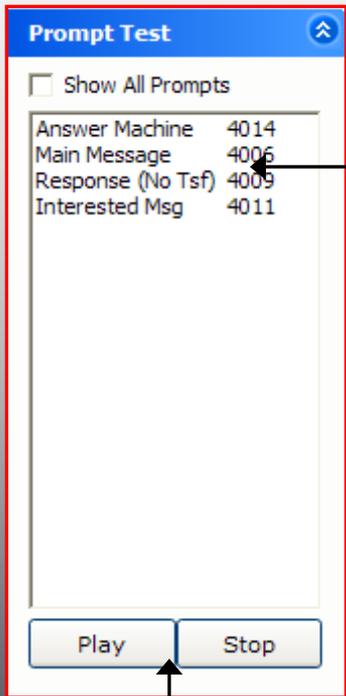**Answer Machine**
- ☑ Answer Machine Message (4014)
- ☐ Answer Machine Only

Use Responses ☑
- ☑ Response No Transfer Message (4009)

Digit

1
- ☑ Interested
- ☑ Interested Message (4011)

- ☐ Decline
- ☐ Decline Message (4017)

2
- ☐ Record Recipient
  Record prompt to recipient is message 0123.

3
- ☐ Enter Number (4015)
- ☐ Confirm Entered Number (0107)

3
- ☑ Play Again

0
- ☐ Allow Transfer
- ☐ Response Transfer Message (4010)

Transfer Number _____

Transfers time period Start 09:00 a   Stop 12:00 a

☐ Transfer Failed Message (4013)

Clicking the Play or Stop buttons will Start/Stop playback of the currently selected prompt in the prompt list.
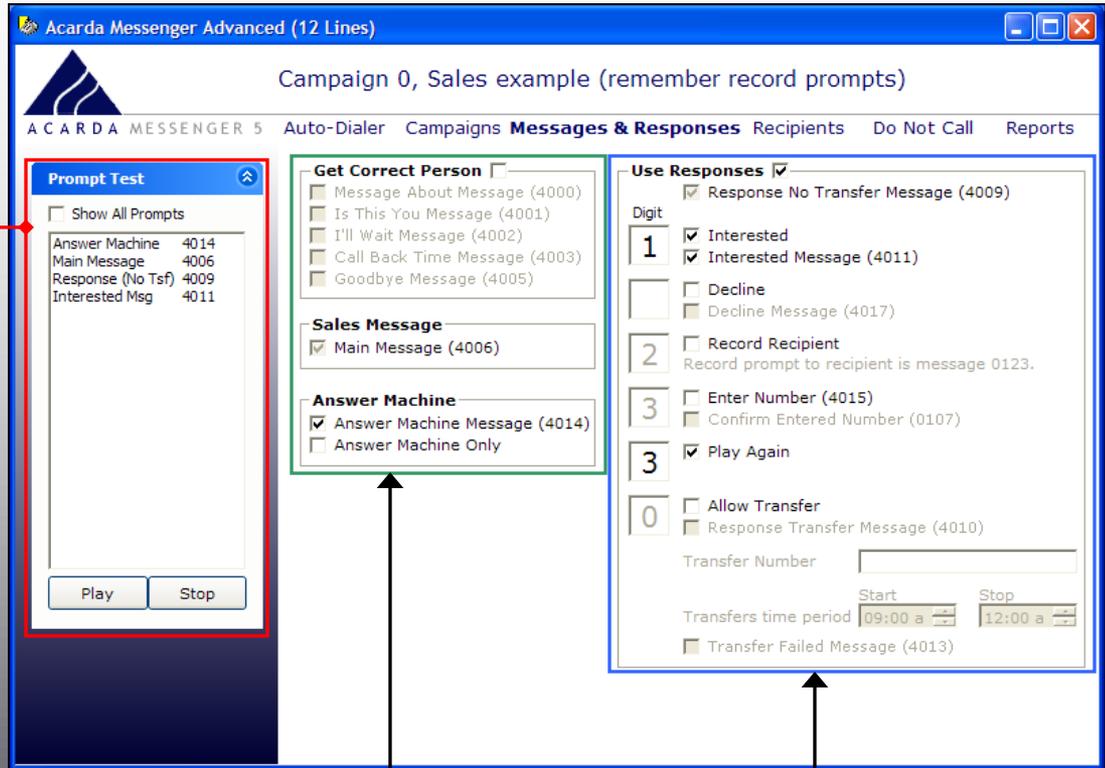
Messages, explained in the next slide.

Responses, explained in the slide after next.

Recording prompts in Acarda Messenger for a campaign requires that you call into the auto-dialer while it is started and paused, in other words started but not dialing out. You then dial the telephone number of one of the lines that has been started, the prompt manager will pick up the call and the prompt manager will ask you for your security PIN code. The default prompt manager PIN code is 1234 then the # symbol.

Security

Dial In PIN Code   1234

Once the PIN is entered succesfully the prompt manager will then ask you to enter in a four digit prompt ID number followed by the # symbol. The four digit prompt ID is located beside the messages and the responses that have messages played in the Messages & Responses screen.

Auto-Dialer   Campaigns   **Messages & Responses**   Recipients   Do Not Call   Reports

Get Correct Person ☐
- ☐ Message About Message (4000)
- ☐ Is This You Message (4001)
- ☐ I'll Wait Message (4002)
- ☐ Call Back Time Message (4003)
- ☐ Goodbye Message (4005)

Sales Message
- ☑ Main Message (4006)

Answer Machine
- ☑ Answer Machine Message (4014)
- ☐ Answer Machine Only

Use Responses ☑
- ☑ Response No Transfer Message (4009)

Digit

1
- ☑ Interested
- ☑ Interested Message (4011)

- ☐ Decline
- ☐ Decline Message (4017)

2
- ☐ Record Recipient
- Record prompt to recipient is message 0123.

3
- ☐ Enter Number (4015)
- ☐ Confirm Entered Number (0107)

3
- ☑ Play Again

0
- ☐ Allow Transfer
- ☐ Response Transfer Message (4010)

sfer Number [   ]

Prompt ID

Transfers time period   Start 09:00 a   Stop 12:00 a

☐ Transfer Failed Message (4013)

Please refer to the Users Guide for more information on recording messages and responses.

ACARDA SALES TECHNOLOGIES

ACARDA MESSENGER 5

You can set Acarda Messenger to have different response options for different campaigns. This is where you get to choose what the answers to questions can be, and to allow the people getting called to enter in a response using their telephone keypad.

The digit column allows you to enter the keypad digit or symbol (* or #).

Note that the 9 digit is reserved for Recipients to add themselves to the Acarda Messenger Do Not Call list.

If you do not want to use responses for your campaign then uncheck the Use Responses checkbox.

Use Responses ☑

Digit

Response No Transfer Message (4009)

| 1 | ☑ Uncheck to disable responses |
| | ☑ Interested Message (4011) |

Decline
☐ Decline Message (4017)

| 2 | ☐ Record Recipient |
| | Record prompt to recipient is message 0123. |

| 3 | ☐ Enter Number (4015) |
| | ☐ Confirm Entered Number (0107) |

| 3 | ☑ Play Again |

| 0 | ☐ Allow Transfer |
| | ☐ Response Transfer Message (4010) |

Transfer Number

Digit Column

Start 09:00 a   Stop 12:00 a

☐ Transfer Failed Message (4013)

Interested: Allows a Recipient to press the a digit on their phone to register they are interested.

Decline: Pressing a keypad digit allows recipient to decline a message.

Record Recipient: Pressing a digit allows the recipient to record a message.

Enter Number: Pressing a digit allows the recipient to enter a number. E.g. Fax or Telephone number.

Play Again: Press a digit to hear the message again.

Allow Transfer: Press a digit if you would like to be transferred. This requires a PBX system supporting flash-hook or a call transfer service.

The settings screen is where you change Acarda Messenger settings. These settings affect **all campaigns.**

Signal to Initiate a Transfer: is used only if you have a PBX or Centrex service and want to transfer calls. If you do not use these, then leave it blank.

Signal to Complete a Transfer: is used in some countries where you have to press a digit keys after the transferring party has answered.

Signal to Cancel a Transfer: is used when you want to cancel a transfer because the line is busy or there is no answer and return to original caller.

Prefix for telephone numbers: is used if you require an outside line to be dialled, or an area or country code if needed.

Suffix for telephone numbers: used to have a common number at the end of each telephone number, or if you require a PIN after dialing.

Blind Transfers: hand the call over to the PBX and let the PBX handle the outcome of the transfer.

Salutation Threshold: for answer machine detection. Greetings longer than this threshold are considered an answer machine.

Total Number of Lines Installed: enter the amount of telephone lines you are using. If you have 4 lines installed then enter 4.
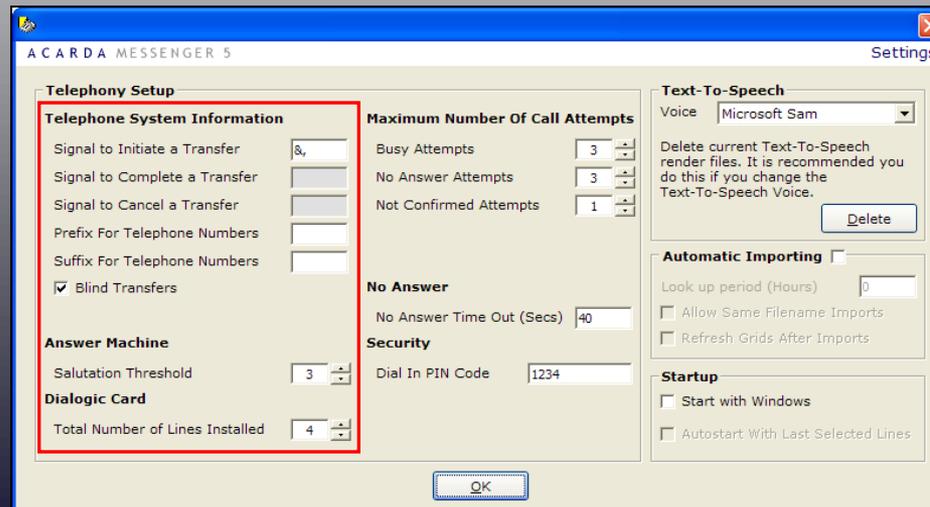
Busy Attempts: set this so the dialer knows how many times to try phoning a number when the number is busy. The maximum is 5.

No Answer Attempts: as above but if the number has no answer. Again the maximum is 5.

Not Confirmed Attempts: is used mainly when the correct recipient answers the call but makes no response to the message. This should be set no higher than 2 or 3 and is usually set to 1.

No Answer Time Out (Seconds): set how many seconds a number should be rung when it is not being answered. If a call is not answered, the auto-dialer will hang up after the number of seconds set within this box.

Dial In PIN Code: this is the PIN number you use when you dial into the dialing into the auto-dialer to record your message prompts. The PIN can be up to 9 digits in length.
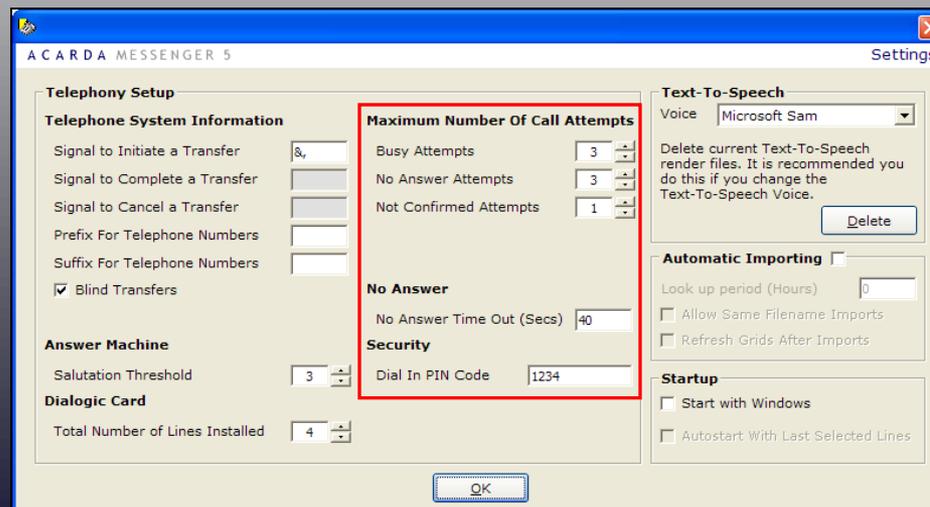
Text-To-Speech Voice: Allows you to select a voice for the Text-To-Speech engine.

Text-To-Speech Delete: Deletes all Text-To-Speech render files (*.tts files) from the auto-dialer. This is only required when you change a TTS voice.

Automatic Importing: enables automatic importing for campaigns where you have configure the Auto-Import information.

Look up period: sets the interval in hours when to check the specified folder for files to import.

Refresh grids after imports: Refreshes the Recipients list after a file has been automatically imported.

Start with Windows: Starts Acarda Messenger when windows starts.

Autostart with Last Selected Lines: When Start with Windows is enabled, Acarda Messenger will start dialing on the last selected lines.
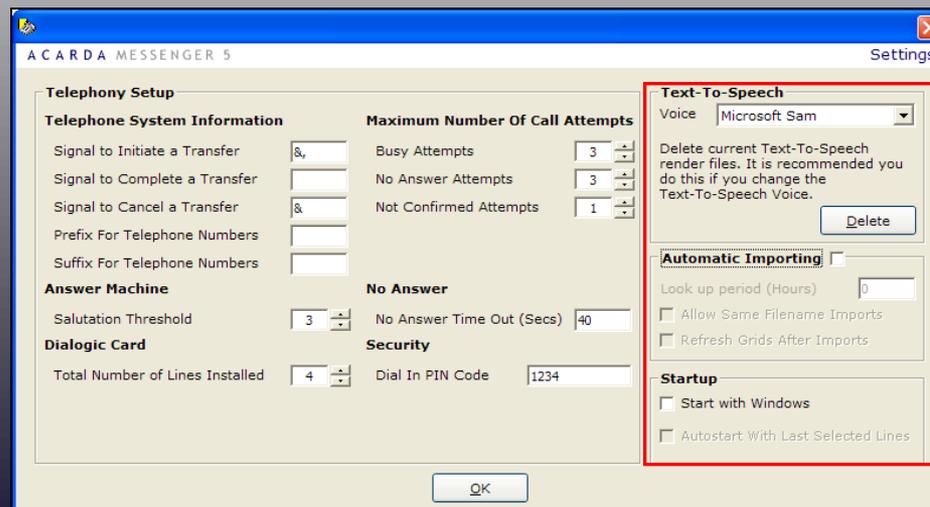
Here is a summary of the main start and stop control window of the Acarda Messenger Auto-dialer.

This tells you whether there is an available line or if there is no line installed.
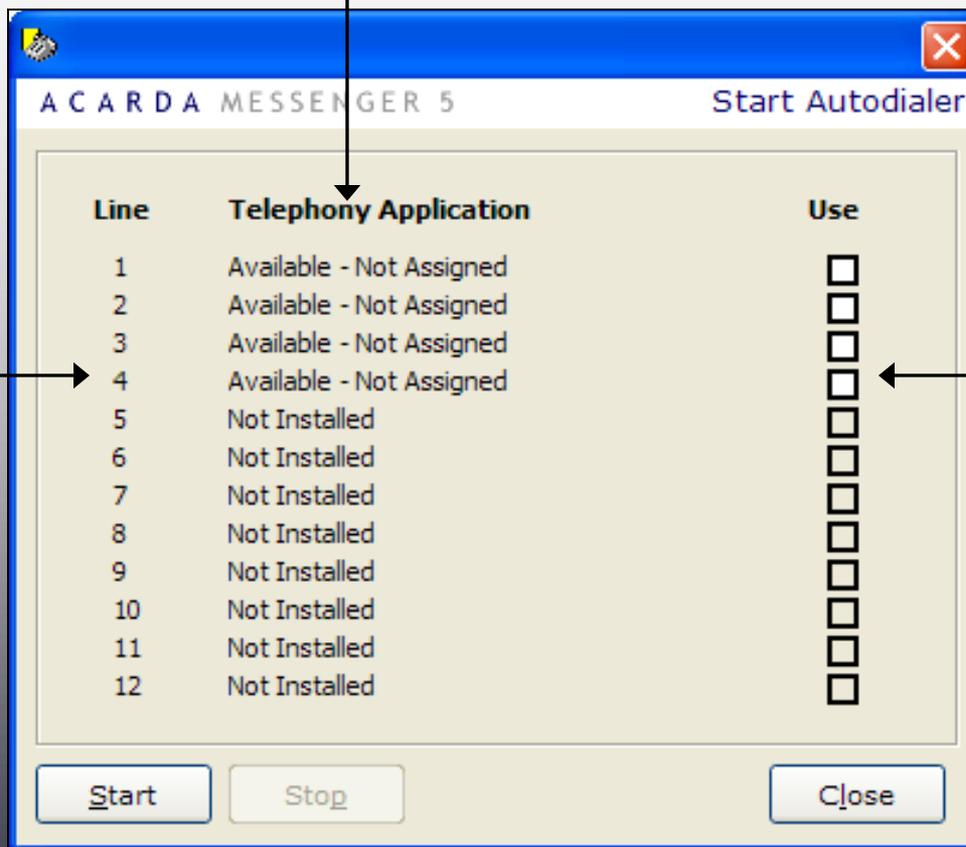
This informs you as to how many telephone lines are available. A maximum of 12 lines can be installed using our Acarda Messenger Auto Dialer software. If you have multiple telephone lines installed, then it may pay to check which line is plugged into the Dialogic card.

This setting allows you to choose how many lines will be used for the dialing of the numbers. To select how many lines will be used, select the check box next to each line. If the check box is grayed out you will not be able to select that line.

ACARDA MESSENGER 5 — Start Autodialer

Line	Telephony Application	Use
1	Available - Not Assigned	☐
2	Available - Not Assigned	☐
3	Available - Not Assigned	☐
4	Available - Not Assigned	☐
5	Not Installed	☐
6	Not Installed	☐
7	Not Installed	☐
8	Not Installed	☐
9	Not Installed	☐
10	Not Installed	☐
11	Not Installed	☐
12	Not Installed	☐

Start   Stop   Close

When the file selection dialog shows, navigate to where your recipients list is stored on your computer.

In this example we have some sample lists located in the Acarda Messenger folder, for this example though we will use the highlighted text document.

To import Recipients you must change to the Recipients screen by clicking Recipients in the navigation bar.

Clicking Import Numbers will open up the file selection dialog.

Once you have selected a file then click Open.

This is where we get to select which part of the import file gets matched up to in the database.

In this example the telephone number in the preview is under the heading "1" and the Recipient Name is under the heading "2".

To choose where they are displayed in Acarda Messenger, we have to out them into the correct position. The arrows to the right show an example for the Recipient Name, which is going to be saved in File Column Position 2.

A small box will appear to ask if you want to allow duplicate telephone numbers in the recipient list. For the sales leads and client call templates we suggest you click no and not allow duplicate imports.
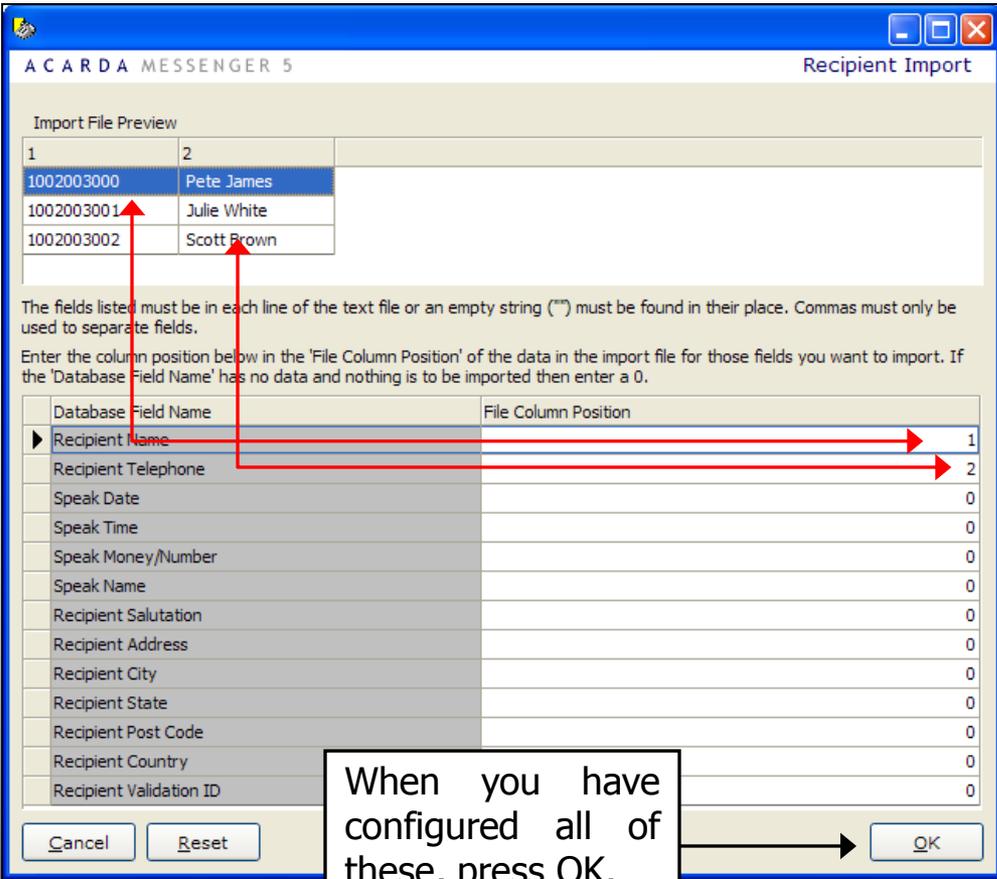
ACARDA MESSENGER 5   Recipient Import

Import File Preview

1	2
1002003000	Pete James
1002003001	Julie White
1002003002	Scott Brown

The fields listed must be in each line of the text file or an empty string ("") must be found in their place. Commas must only be used to separate fields.

Enter the column position below in the 'File Column Position' of the data in the import file for those fields you want to import. If the 'Database Field Name' has no data and nothing is to be imported then enter a 0.

Database Field Name	File Column Position
Recipient Name	1
Recipient Telephone	2
Speak Date	0
Speak Time	0
Speak Money/Number	0
Speak Name	0
Recipient Salutation	0
Recipient Address	0
Recipient City	0
Recipient State	0
Recipient Post Code	0
Recipient Country	0
Recipient Validation ID	0

Cancel   Reset   OK
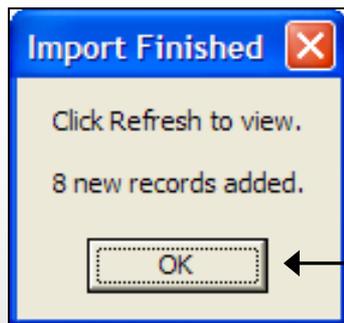
When you have configured all of these, press OK.

Import Recipients

Do you want to allow duplicate telephone numbers in this campaign?

Yes   No

ACARDA SALES TECHNOLOGIES

Import Finished ✖

Click Refresh to view.

8 new records added.

[OK]

Once imported a dialog will then show confirming the import has completed and also lets you know how many records have been successfully imported and how many records that have not.

Click Ok to continue.

If you are wanting to view the numbers were imported correctly, it is best if you refresh the Recipient List by clicking the Refresh List link.

Acarda Messenger Advanced (12 Lines)

Campaign 0, Sales example (remember record prompts)

ACARDA MESSENGER 5 Auto-Dialer Campaigns Messages & Responses **Recipients** Do Not Call Reports

Common Tasks ⊗
Refresh List
Import Numbers
Export Numbers
Generate Numbers
Reset Recipients
Delete Recipient
Delete All

Filter ⊗
[ ] [Apply]

Auto Import ⊗

Telephone	Status	Response	Date	Time
*				
▶ 1002003000	Send	No Action	1/11/2007	1:44:15 p.m.
1002003001	Send	No Action	1/11/2007	1:44:15 p.m.
1002003002	Send	No Action	1/11/2007	1:44:15 p.m.
1002003003	Send	No Action	1/11/2007	1:44:15 p.m.
1002003004	Send	No Action	1/11/2007	1:44:15 p.m.
1002003005	Send	No Action	1/11/2007	1:44:15 p.m.
1002003006	Send	No Action	1/11/2007	1:44:15 p.m.
1002003007	Send	No Action	1/11/2007	1:44:15 p.m.

Record: I◀ ◀ [1] of 8 ▶ ▶I ▶*

Acarda Messenger has an in-built Number Generator that allows you to generate leads for cold calling. Also remember some of these numbers will be invalid and/or on the Do Not Call List, so please remember to import your Do Not Call list into Acarda Messenger.
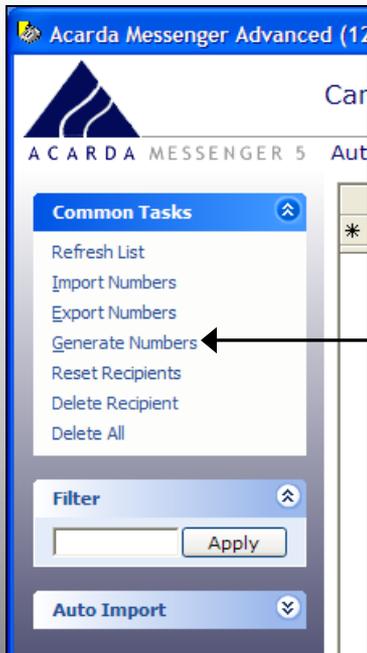
To open the number generator, click the Generate Numbers in the Recipient Common Tasks Sidebar.
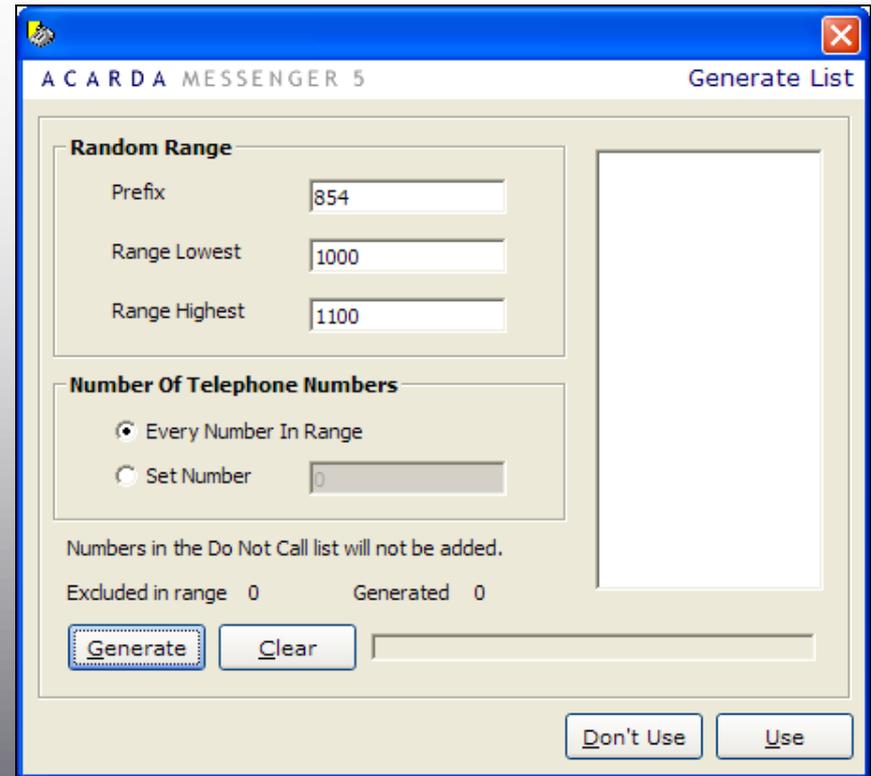
The prefix is the start of the telephone number (an area code or exchange code) while the Range Highest and Lowest is the range to generate numbers in between. The Number of Telephone Numbers allows to generate either all numbers in the range or a sample amount that you can set.

Click the generate button to generate and then to bring them into your recipient list click use or to cancal click don't use. The numbers are not in sequencial order to avoid calling numbers sequencially.

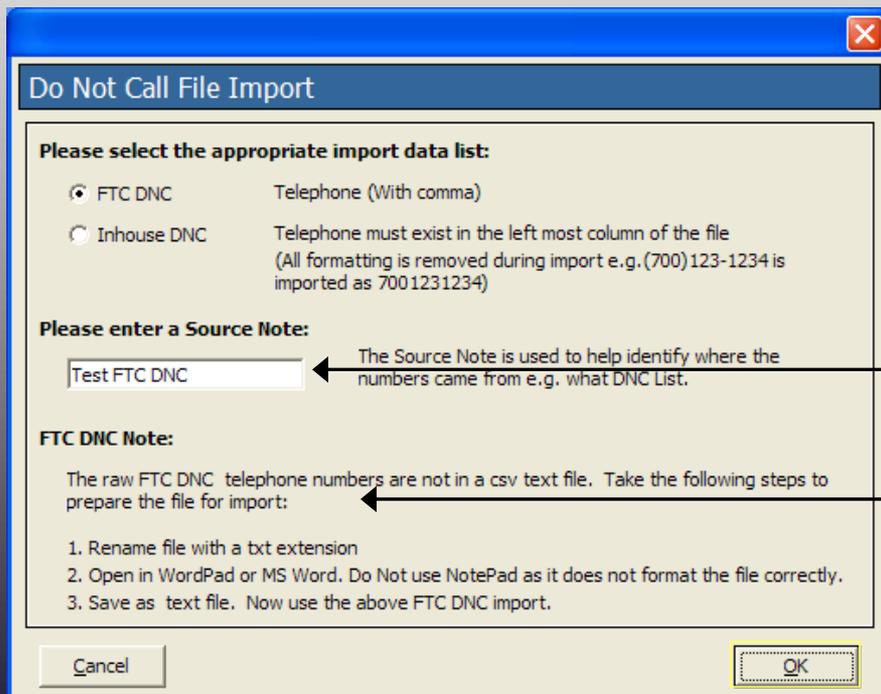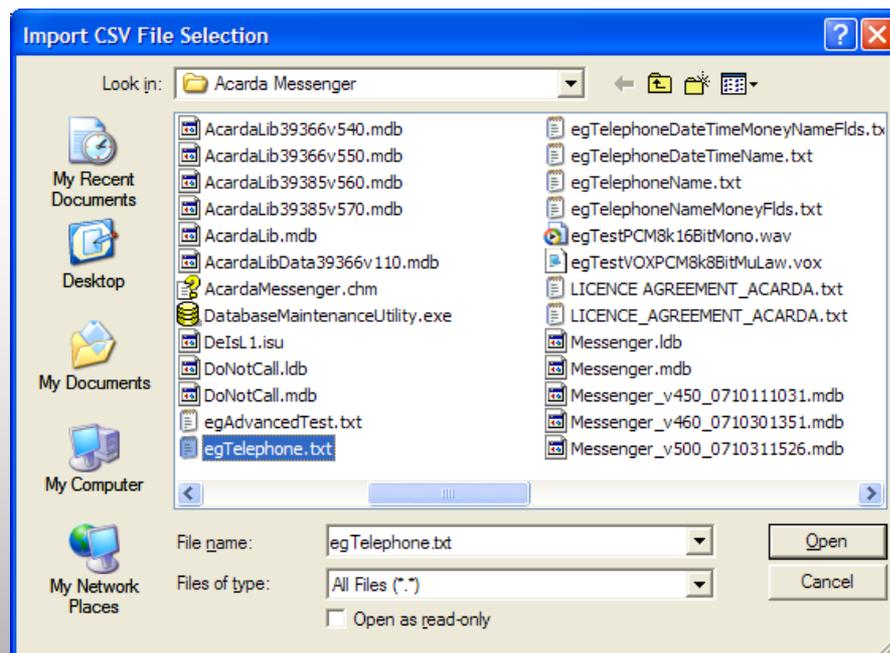The process for getting Do Not Call numbers into Acarda Messenger is very similar to importing recipients.

If you are signed up with the United States Federal Trade Commission Do Not Call Registry and get Do Not Call numbers from there, then you can import that list into Acarda Messenger. Otherwise if you know of certain numbers that you wish to not call or people have asked to not be called, you can enter them in manually.

If you have a Do Not Call list from the FTC website then you can import them using the import numbers function.
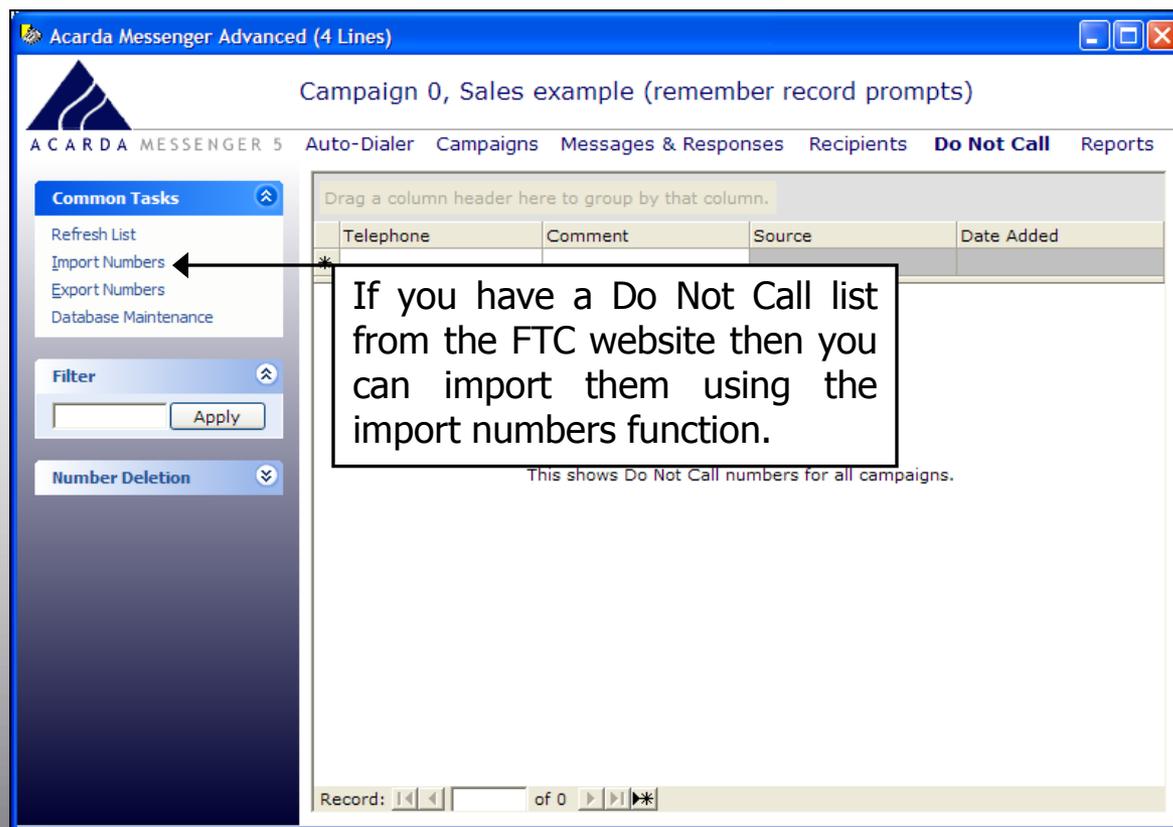
After clicking the import numbers link, this dialog will appear informing you that you should Compact and Repair the Do Not Call database after import. This is important to keep your databases healthy.

To begin, select your Do Not Call and click Open.

This will bring up a dialog box which gives you a few options. If you are importing a FTC DNC list, then please make sure you choose the FTC DNC, otherwise if you are importing another type of list then select In-house DNC.

Import CSV File Selection

Look in: Acarda Messenger

My Recent Documents:
- AcardaLib39366v540.mdb
- AcardaLib39366v550.mdb
- AcardaLib39385v560.mdb
- AcardaLib39385v570.mdb
- AcardaLib.mdb
- AcardaLibData39366v110.mdb
- AcardaMessenger.chm
- DatabaseMaintenanceUtility.exe
- DeIsL1.isu
- DoNotCall.ldb
- DoNotCall.mdb
- egAdvancedTest.txt
- egTelephone.txt

Right column:
- egTelephoneDateTimeMoneyNameFlds.txt
- egTelephoneDateTimeName.txt
- egTelephoneName.txt
- egTelephoneNameMoneyFlds.txt
- egTestPCM8k16BitMono.wav
- egTestVOXPCM8k8BitMuLaw.vox
- LICENCE AGREEMENT_ACARDA.txt
- LICENCE_AGREEMENT_ACARDA.txt
- Messenger.ldb
- Messenger.mdb
- Messenger_v450_0710111031.mdb
- Messenger_v460_0710301351.mdb
- Messenger_v500_0710311526.mdb

File name: egTelephone.txt   Open

Files of type: All Files (*.*)   Cancel

☐ Open as read-only

Do Not Call File Import

Please select the appropriate import data list:

◉ FTC DNC   Telephone (With comma)

◯ Inhouse DNC   Telephone must exist in the left most column of the file
                 (All formatting is removed during import e.g. (700)123-1234 is
                 imported as 7001231234)

Please enter a Source Note:

Test FTC DNC   The Source Note is used to help identify where the
                 numbers came from e.g. what DNC List.

FTC DNC Note:

The raw FTC DNC telephone numbers are not in a csv text file. Take the following steps to prepare the file for import:

1. Rename file with a txt extension
2. Open in WordPad or MS Word. Do Not use NotePad as it does not format the file correctly.
3. Save as text file. Now use the above FTC DNC import.

Cancel   OK

You will have to enter in a name for the Source Note. This lets you know where you got the numbers from.
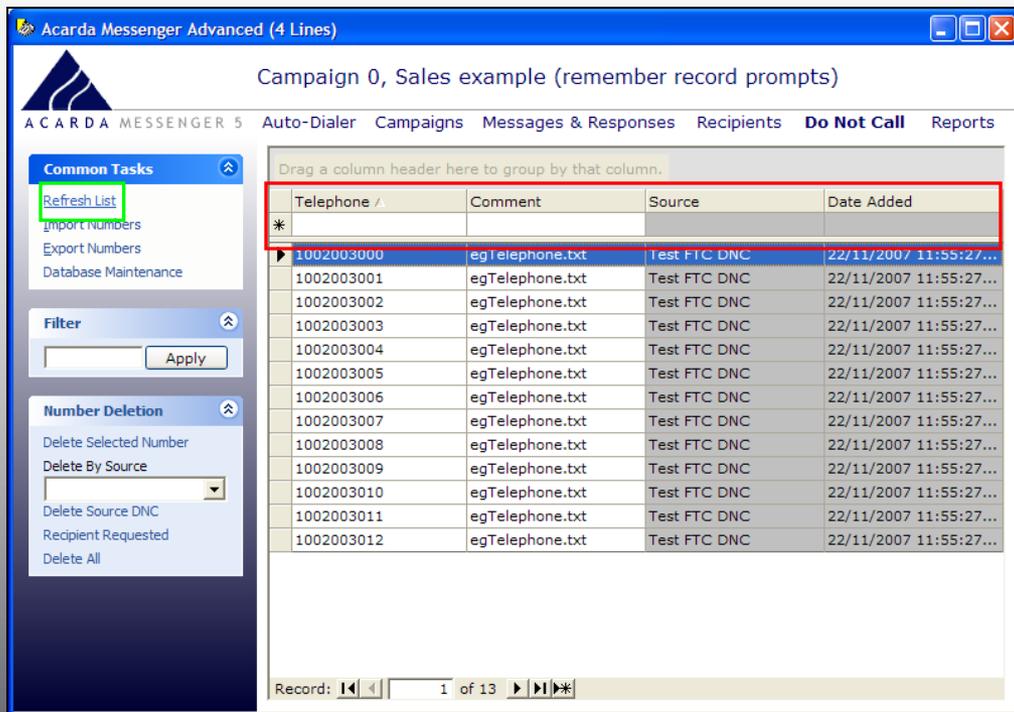
Before you can import an FTC DNC list, you need to follow the instructions in the FTC DNC Note, otherwise the import will not work correctly.

Once that is complete, you can then click OK.

Once the import has finished, a pop up will appear informing you that new records were added. Take note of the number of records imported.

Clicking Refresh List in the main Do Not Call window will ask you if you are sure you want to view them. You do not have to view the Do Not Call list, but it does pay to view it, just to make sure the import worked. So in that case you will click Yes.

You can also add your own Do Not Call numbers, by simply entering the telephone number and any Comments in the row or the type of this list.

If you have any questions about Acarda Messenger please contact us on the telephone numbers below or via email.

Website	Telephone
USA and Canada	
http://www.acarda.com	1800 728 2050
Australia	
http://www.acarda.com.au	+64 7 579 1153
New Zealand	
http://www.acarda.co.nz	07 579 1153

salessupport@acarda.com