

Predictive Dialer Quick Start Guide

Setting up an automated system for reaching lots of customers by phone probably sounds daunting, but it's not — NationwidelS makes it easy! Our simple, cost-effective Dialer product immediately adds value to your business by allowing you to contact far more people in far less time.

The Three Easy Steps

Creating a NationwidelS Dialer campaign is a snap. All it takes is three easy steps and you're done!

Select Your Sounds — Create recordings for various scenarios related to your outgoing calls, including those answered by a live person or answering machine. Also enable the transfer function, so that potential customers can speak with your representatives immediately!

The Sounds Tab

On this tab, you choose whether you would like to enable a message for any of the Live Answer, Answering Machine, Transfer, or Do Not Call options by selecting Enabled or Disabled within each of the four corresponding sections. For each feature enabled, a sound file will need to be chosen by either creating a new recorded or text-to-speech message, or selecting an existing sound file.

Voice Broadcast - Sounds

1. Sounds

2. Contacts

3. Settings

Live Answer

Enabled

Select the message that is played for a live answer.

Sample Audio for Live Answers

Select a Message

Enable Transfer

Transfer

Disabled

Answering Machine

Enabled

Select a message that plays when an answering machine picks up your call.

Sample Audio for Machines

Select a Message

Do Not Call

Enabled

Select a message that plays when the Do Not Call option is chosen by the recipient of your call.

Sample Audio for Do Not Call

Select a Message

DNC Digit

8

Custom Context

DEFAULT-VB

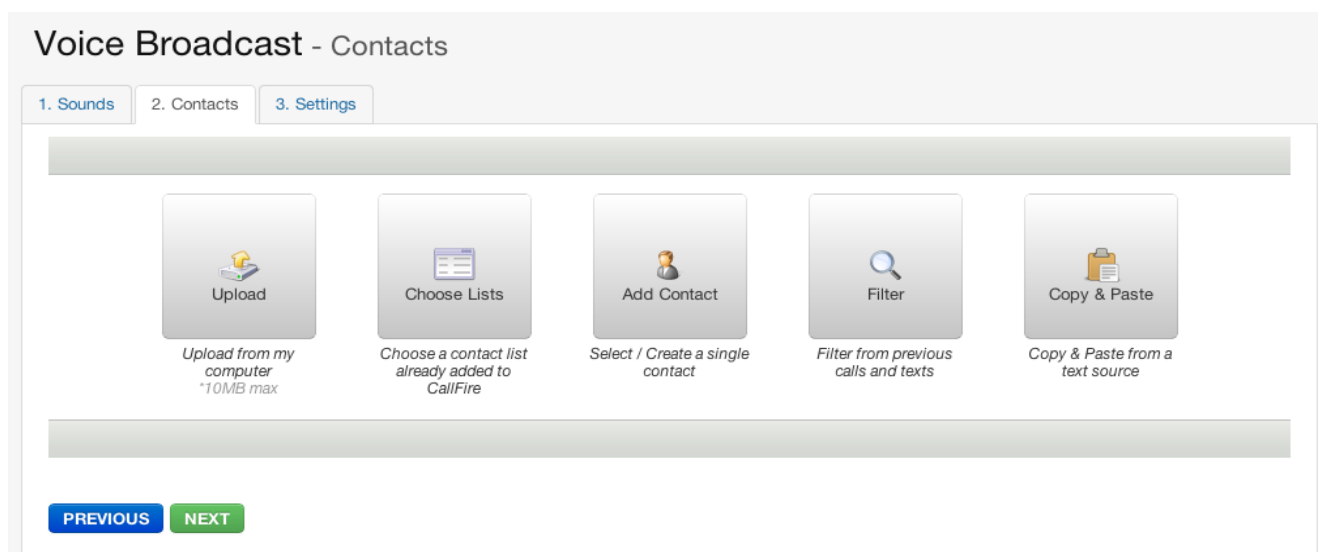
SEND TEST CALL

NEXT

Add Your Contacts — Upload a list of people you'll reach from your computer, or paste it in from a text source. If you've conducted campaigns before, you can choose a list you've already used or filter from previous calls or texts.

The Contacts Tab

To add contacts to your Dialer campaign, use the Contacts tab, which is shown below. Instructions on how to add contacts is located in **Managing Contacts** in the Getting Started section.



When you are finished adding and configuring contacts, click the green Next button at the bottom to move on to the Settings tab.

Managing Contacts

Juggling different lists of people you want to contact, via different methods, may sound challenging, but NationwidelS makes it easy. NationwidelS provides you with lots of important tools that allow you to effectively target your audience, find errors in your lists of contacts and resolve them, and manage the always-important Do Not Call list.

In this help section, you'll learn about ...

1. **Adding Contacts to Campaigns** — You have five options to add contacts, including copy & paste, upload, add a single contact, choose an existing list, or use a filter to drill down deeper.
2. **Contact Lists** — Once called "Phonebooks" in earlier versions of NationwidelS, the Contact Lists option allows you to easily create and manage new lists of

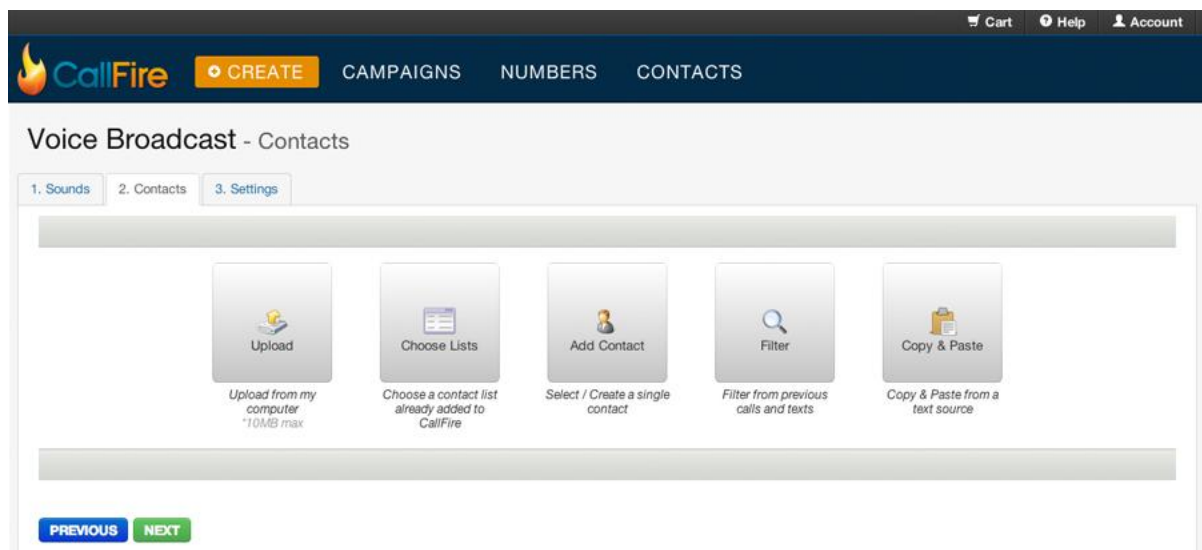
contacts.

3. **Validating Contacts** — NationwidelS doesn't want you sending out a bunch of texts or calls that don't go through. What's the point in that? So we've designed seven — yes, seven! — system safeguards that check the accuracy of the lists of contacts you create. For example, our system notifies you if you fail to format a number correctly, if a phone number is invalid, if a number is duplicated in your list, or if a number is on your Do Not Contact list.
4. **Do Not Contact List** — For all your text and broadcast campaigns, you are required to offer the people you contact the option of not being contacted again. NationwidelS lets you create, maintain and update this crucial list easily and effectively.

You may only utilize some of the above capabilities, depending upon the number of people you need to contact or how sophisticated the information you need. But it all starts with knowing how to add contacts to your campaigns. So come along with us to the next section!

Contact Selection

One way to add and select contacts is to do so when you create a text or broadcast campaign. You access this via the Contacts tab, as shown below. There, you are given five options for creating lists of contacts: Upload; Choose Lists; Add Contact; Filter, and Copy & Paste. All of these are detailed in the Contact Selection section of this help section.



Contact Lists

The Contact Lists screen, as shown below, allows you to create and manage lists as well. You access this page via the CONTACTS link in the top navigation bar. We'll describe how this works in the Contact Lists section of this help document.

CallFire

CREATE

CAMPAIGNS

NUMBERS

CONTACTS

ADMIN

Cart

Help

CallFire

Contact Lists

New Contact List

Contact Lists

Archive

Filter

	Name	Size	Created	Status	Id
All Contacts	<input type="checkbox"/> Sample Contact List 1	86	October 10, 2012 7:50 PM	Active	9587001
DNC List	<input type="checkbox"/> Sample Contact List 2	24	September 29, 2011 3:33 PM	Active	25001
	<input type="checkbox"/> Sample Contact List 3	23	September 27, 2011 4:55 PM	Active	17001
	<input type="checkbox"/> Sample Contact List 4	3089	September 15, 2011 6:44 PM	Active	1

Finalize Your Settings — Name your campaign, designate the phone number that people will see when you call, and set the maximum number of calls that our system will make simultaneously. Other options include automatic redialing, time restrictions and creation of schedules.

The Settings Tab

As seen below, the Settings tab requires some additional information to be entered before the campaign can begin or be scheduled. So let's get this campaign finalized and send it out!

Voice Broadcast - Settings

1. Sounds
2. Contacts
3. Settings

Name	<input type="text" value="My Voice Broadcast Campaign"/>	
Labels		
Caller ID	<input type="text" value="855-555-5555"/>	
Restrictions	Local Time Dialing Restrictions <input checked="" type="checkbox"/> 8:00 AM to 9:00 PM Max Simultaneous Calls <input type="text" value="100"/>	Automatic Retry Disabled <input type="text" value="60"/> minutes between tries <input type="checkbox"/> Answering Machine <input checked="" type="checkbox"/> Busy <input checked="" type="checkbox"/> No Answer
Schedule	<input type="button" value="Add Schedule"/> or <input type="checkbox"/> Start Immediately <input type="checkbox"/> Resume campaign the next day if unfinished	

As seen below, there are several fields and functions to fill in:

1. **Name:** Go ahead, give your campaign a name!
2. **Labels:** A label is basically like a folder. If you want to use a label to make it easier to find your campaign(s) for later use, use the pulldown menu to name and manage your labels.
3. **Caller ID:** The caller ID is the number that folks see when the Dialer calls them. If this is your first Dialer campaign, or you wish to add another caller ID number, click on the New Caller ID button and follow the instructions for verifying a caller ID number. If not, then select one of your existing caller ID numbers from the pulldown menu.
4. **Restrictions:** This box offers you several important options ...
 - **Local Time Dialing Restrictions:** Click the box, then select the hours during which you want calls made from the pulldown menus.
 - **Automatic Retry:** Decide whether or not you want the system to retry numbers it didn't reach the first time. Designate the number of retries, the length between them, and which features you want to enable.
 - **Max Simultaneous Calls:** Enter the maximum number of calls that you want NationwidelS's powerful system to simultaneously dial for you.
5. **Schedule:** If you want your campaign to begin right away, select the Start Immediately box. Otherwise, click on the Add Schedule button and complete the settings in the Create Schedule pop-up box. After you click the green Create Schedule button, you'll be returned to the Settings tab, and you'll see your schedule in the Schedule section.

When you're done, click on the green Finalize button.

Suddenly, you'll see the New VB Campaign - Created Successfully screen, as shown below. Just click on one of your two options!

Okay, so there's your quick overview of Dialer at NationwideIS. Let's get started!