

Technical Details of Predictive Dialer

Our Two Types of Predictive Dialers

Type 1: Single Agent Predictive Dialing Station

This type dials on 1 to 3 telephone lines for each agent. With this type, you can have only one agent or you can have multiple agents, but they will be independent of each other. This type is the simplest and least expensive method of predictive dialing. One year of Technical Support by telephone and/or by email is included.

Type 1 Requirements: (Also see "Site Preparation".)

- 1) **Computer with Windows XP Pro or Home.** See more specific "Computer Requirements" page.
- 2) **Powered Telephone Headset System** for each agent (a stand-alone telephone is not used). We do not provide these headsets because there are a wide variety of choices and preferences. Recommended **corded** headset: **Plantronics S11 or S12** (priced from \$50 to \$80). Recommended **wireless** headset: **Plantronics CS50 or CS55** (priced from \$175 to \$250). See "Headsets Are Required" page for details.
- 3) **Telephone Line Requirements:** either 1, 2, or 3 standard business or residential analog lines

Type 2: Multiple Agent Predictive Dialing System

This type can dial on many phone lines from one computer and connect the calls to multiple agents as they are available. The predictive dialer software and the list of telephone numbers are located on the server computer and each agent uses a work station computer with agent station software. One year of Technical Support by telephone and/or by email is included. Networking of computers is required with this Multi-Agent System.

Type 2 Requirements: (Also see "Site Preparation".)

- 1) **Server type computer with Windows XP Pro.** See more specific "Computer Requirements" page.
- 2) **Workstation type computer** (desktop or laptop) with Windows 2000, XP Home or Pro, or Vista Business for each agent. See "Computer Requirements" page.
- 3) **Telephone/Headset System** for each agent. We do not provide these because there are a wide variety of choices and preferences. Recommended **corded** headset: **Plantronics T10** (priced from \$60 to \$90). Recommended **wireless** headset: **Plantronics CT11 or CT12** (priced from \$50 to \$100). See "Headsets Are Required" page for details. **Note:** Installation should be done locally (not included in our Technical Support). We highly recommend a dedicated twisted pair wire run to each agent station from the station breakout box at the server. Cat5 wiring is ideal as long as a dedicated twisted pair is used for each agent station. Station wiring is always analog wiring – even when a digital T1 system is installed.
- 4) **Telephone Line Requirements:** standard **analog** or digital **T1-PRI** (either 4 ESS or 5 ESS or DMS 100). Note: T1-AMI lines are not supported. The telephone company feature "call transfer disconnect" or a PBX will be needed if call transfers will be used. Phone lines are NOT needed for any centrally located agents because the PIKA voice boards fulfill that need. If agents are remotely located, one phone line per agent is required. Note: Telephone cables are NOT supplied with the Type 2 Predictive Dialers due the unknown lengths that each customer requires. * **PRI TELEPHONE LINES:** Each PRI-T1 is 24 lines, but only 23 are used for dialing, as 1 line is used for data transmission by the phone company.

Networking (not included in our Technical Support)

For Type 2 Multiple Agents only: Prior to installing the Predictive Dialer (PD), the Server and each Agent Workstation computer will need to be networked together with a **private peer to peer network** using a **dedicated switch** (not an internet switch or router). The number of agents you can network will depend on several factors including your data base type and size, how many users are on the network, and the speed of the network. It is highly recommended that someone on your staff be a **proficient network technician** or that you have a **network technician available locally** for the initial installation and to help whenever your network goes down. If needed; however, on-site installation and/or training is available for an additional charge. Also, the Server and Workstations' **network must be dedicated** to the PD when in use. If not dedicated, there may be delays in transferring the data to the agents, resulting in hang-ups and lost calls. Security firewalls, screen savers, automatic Windows updates, power management, and anti-virus software may need to be turned off while using the system. Surfing the internet or using other programs over the network will interfere with the speed, performance, and security of your PD. A second network card should be installed on workstations that need to use the internet while also using the PD. These network cards should connect to a separate switch and workgroup that is not connected to the PD dedicated network. **Important: The server requires a static IP address; we recommend that you set it to 250. In addition, if using Remote Agents, an external static IP address is required.**

Computer Requirements

If you provide a computer-recommended specifications:

Server PC: (Should be dedicated to the Predictive Dialer.) At least 2 GHZ processor, 512 MB of RAM (or 1 Gig if 8 or more agents), 20 gigabytes of AVAILABLE hard drive space, CD ROM Drive, Super VGA Monitor, Keyboard, Mouse, and Surge Protector and/or Battery Backup for the electrical and telephone lines. The computer's case and motherboard should have PCI slot(s) and enough room for the PIKA voice board(s) described on the order form. Note: If you will be importing large lists of telephone numbers, you may need a faster processor, more megabytes of RAM, and more hard drive space. The **Type 1 Single Agent** works with either **Windows XP Home** or **Pro**, while **Type 2 Multiple Agents** needs **Windows XP Pro**. Important: The PIKA voice boards used with **Type 2** are full length (13") so make sure the computer case is large enough to fit the boards.

Uninterruptible Power Supply: We strongly recommend that you use a Battery Backup-Surge Protector to protect your hardware and valuable data in case of power surges or power outages.

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* If purchasing **Type 1 Single Agent** system, the Agent may also use the Server PC as an Agent Station or use a separate Agent Work Station as described below.

* If purchasing **Type 2 Multiple Agents** system, each Agent will need the Agent Work Station as described below.

Agent Work Stations (desktops or laptops): At least 1 GHZ processor, 512 MB of RAM, 10 megabytes of AVAILABLE hard drive space, Super VGA Monitor, Keyboard, Mouse, and Surge Protector and/or Battery Backup for the electrical lines. Works with **Windows 2000, XP Home or Pro (Pro preferred), or Vista**. Inexpensive work stations can be purchased from various manufacturers.

Site Preparation

When purchasing a Predictive Dialer, there will be a number of issues to address prior to installation:

- 1) **Computers:** Do you have the necessary server with Windows XP Pro and agent computers with Windows XP Home or Pro or Vista and monitors? (See "Computer Requirements".)
For Type 1 Single Agent, you will need a PCI slot and space inside the computer for a PIKA voice board that is 4" high and 7" long.
For Type 2 Multiple Agents, you will need PCI slots and space for 1 or more PIKA voice boards that are 4.5" high and 13" long.
- 2) **Networking:** If using Type 2 for multiple agents: Do you have someone local to install your private Peer to Peer Network using a dedicated switch, or will you need someone to travel to your site for the installation? **Note:** Firewalls, automatic Windows updating, screen savers, power management, and anti-virus software may need to be turned off while operating the predictive dialer. (See "Networking" details.)
- 3) **Static IP Address:** If using Type 2 for multiple agents, do you have a static IP address (preferably set to 250)? If using Remote Agents, do you also have an external static IP address?
- 4) **Telephone Service:** Do you know what kind of telephone service to order and by what date will the lines be installed by your telephone company? (See "Telephone Line Requirements" on the "Our Two Types of Predictive Dialers" page.) Do you have someone available locally who will wire the telephone lines to the server computer?
- 5) **Telephone/Headsets:** Do you have the proper type of equipment for each agent? Do you have someone available locally to install and wire each telephone/headset from the server computer to each agent's workstation? (See "Headsets Are Required".)

- 6) **Dialing Lists:** Do you have telephone lists to dial? Please contact your salesperson if needed.
- 7) **Do Not Call Lists:** Are you registered on Federal and/or State web sites if required by law for your application?
- 8) **Qualified Personnel:** Do you have agents? Do you have an agent supervisor? Do you have a technical person readily available locally if your telephones or computer system goes down?
- 9) **Remote Agents:** Do any remotely located agents have the necessary high speed internet service? (Note: Dialup and satellite connections are too slow.)

**If you need help or do not know the answers to all of the above questions,
please contact us prior to purchase and/or prior to installation.**