



VOICE USER GUIDE

Up to date as of 4.24.2023

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Overview

The SimplyCast Voice channel provides organizations with a communication tool that can be used to provide immediate notifications via phone calls. Voice is a communication channel that can allow your organization to reach out to subscribed contacts and send them messages directly to their phone.

When creating a voice campaign, you can choose to upload a recorded file from your device or use the text-to-speech functionality that is available. Voice campaigns can be scheduled to send whenever there is a need so there is one less thing for you to think about.

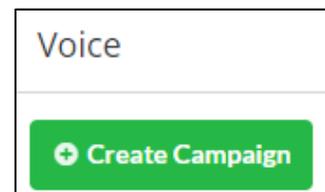
Voice Summary

In order to set up and send a voice campaign in the SimplyCast platform, you will need to go to the Voice dashboard. Voice can be found in the top bar in the Applications dropdown menu. From here, you will be brought to the main Voice Dashboard where you are able to create a new project, copy an existing project, and see a list of all the voice campaigns you have created.

From the Voice Dashboard, you are able to:

Create a New Voice Campaign

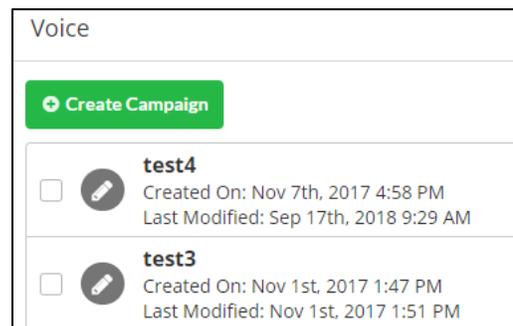
If you wish to create a new voice campaign, there is a green Create Campaign button at the top of the Voice Dashboard on the left-hand side on the Dashboard tab.



Clicking this button cause a pop-up to appear, which will ask for a name for the Voice campaign. Enter the name and click Create to proceed or Cancel to halt progress. Refer to the *Create a New Voice Campaign* section to learn how to create and set up your voice campaign.

View the List of Voice Campaigns

Below the Create Voice Campaign button, you will see a list of all of the voice campaigns you have created, with the most recent appearing at the top. If there are no projects listed, this means you have not yet created one.



You will be able to see three pieces of information:

- **Project Name:** The name you gave your voice project
- **Created On:** The date the project was created
- **Last Modified:** The date the project was last modified

[**Note:** For scheduled campaigns you will also see the date and time the campaign is scheduled to send.]

Find Older Voice Campaigns

To view a voice campaign that does not immediately appear in the list:

- Navigate to the bottom of your screen where you will find the page numbers indicating the total number of campaigns you have created.
- Click either the page number you would like to visit to proceed to another page of campaigns or the Next button, which will take you to the next page of voice campaigns.
- If you know the page number you would like to go to, enter the page number in the provided field and select Go.
- Choose how many campaigns to display at a time by clicking on the “Showing...” link located to the right of the number of displayed voice campaigns.

<input type="checkbox"/>		test Created On: 2017/02/08 12:34 PM Last Modified: 2017/02/08 12:34 PM
<input type="checkbox"/>		test Created On: 2016/07/15 10:10 AM Last Modified: 2016/07/15 10:10 AM
<input type="checkbox"/>		test Created On: 2016/07/15 10:10 AM Last Modified: 2016/07/15 10:10 AM
<input type="checkbox"/>		Test Campaign Created On: 2016/05/06 10:27 AM Last Modified: 2017/09/11 2:05 PM
<input type="checkbox"/>		testing voice numbers Created On: 2015/06/22 10:17 AM Last Modified: 2015/06/22 10:17 AM

Displaying 1 - 6 of 6 | Showing 10 | Prev 1 Next | Enter page Go

Search Voice Campaigns

If you are looking for a particular voice campaign you have created, search through your projects in the list on the Voice Dashboard by:

- Locating the search bar in the top right-hand corner of the page.
- Typing in the text you would like the system to search by.
- The voice campaigns will begin to filter automatically.

Edit a Voice Campaign



Once you have created voice campaign drafts, they will appear in a list on the main Voice Dashboard.



To edit a voice campaign:

- Click the blue Edit button located at the far right of the screen across from the corresponding project name.
- You will be taken into voice setup editor for that project. See the *Create a New Voice Campaign* section for information on the voice setup.

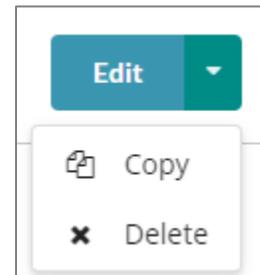
[**Note:** You cannot edit a voice campaign that has been sent or is in the process of sending.]

Copy a Voice Campaign

You can also copy the template of a voice project to create a new campaign easily and quickly.

To copy a voice campaign:

- Navigate to the right side of the screen across from the name of the campaign you wish to copy, and you will either see a blue Edit button or a blue View Reports button with a downward-facing arrow to the right.
- Clicking this arrow will bring up a dropdown menu with the option to Copy.
- Enter the name of your new campaign in the pop-up that appears and click Create, which will add the new campaign to the Voice Dashboard.
- Click the Edit button of the new campaign to begin the setup process. See the *Create a New Voice Campaign* section for more information on the voice setup process.

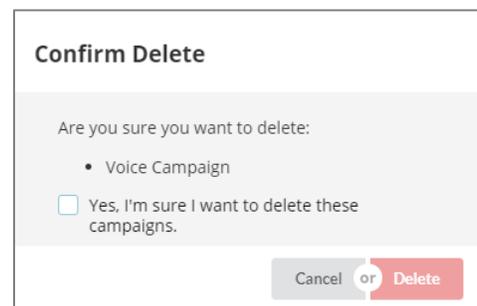


[**Note:** You cannot reschedule a sent campaign. Copying a campaign allows you to quickly set up and send an identical campaign.]

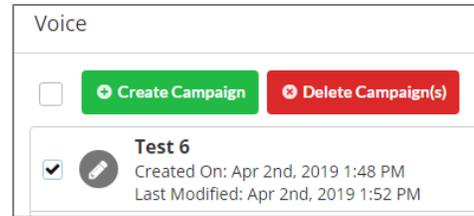
Delete a Voice Campaign

To delete an existing voice campaign:

- Navigate to the right side of the screen across from the name of the campaign you wish to delete and you will either see a blue Edit button or a blue View Reports button with a downward-facing arrow to the right.
- Clicking this arrow will bring up a dropdown menu with the option to Delete.
- Confirm the deletion in the pop-up that appears.

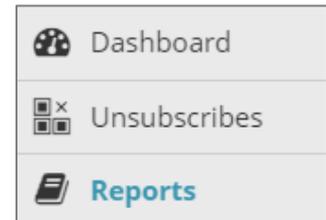


[**Note:** You can alternatively check off one or more voice campaigns in the list and a red Delete Campaign(s) button will appear next to the green Create Campaign button. Clicking this button will produce the same confirmation pop-up window.]



Access Voice Reports

You can easily view the report for any voice campaign that has already been sent out. To enter the main Voice Reporting page in the SimplyCast Reporting interface, navigate to the list of tabs on the left-hand side of the screen in the Voice Dashboard. Click the Reports tab which will take you to the Reporting page where all the information received for that particular project will be displayed. For more information about Voice reports, to the *Reports* section.



[**Note:** You can also access the report of a specific, completed campaign from the list of voice projects. If a campaign is complete, the blue Edit button changes to View Reports. Click this button to be taken directly to that campaign's report.]

Create a New Voice Campaign

Once you have clicked on the green Create Voice Campaign button in the Voice Dashboard you will receive a pop-up window asking you to name your new voice campaign.

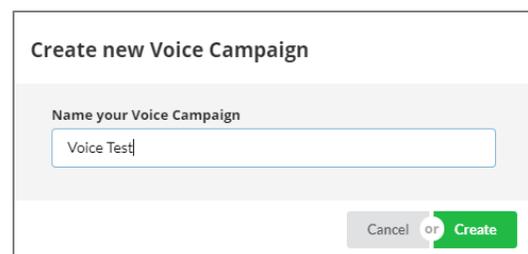
Click Create once you have named your voice campaign and proceed to the main setup process or click Cancel to return to the main Voice Dashboard without creating a new project.

On the Voice Setup page you can:

Create Voice Message Content

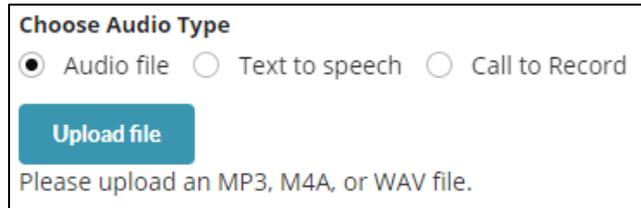
You have three options when creating the content for your new voice message.

- Audio File
- Text-to-Speech
- Call to Record



Upload Audio File

To upload an existing audio file from your device to use as your voice message, make sure you have selected Audio File on the Setup page. When it is selected, a blue Upload File button should appear below. Click this button and you will be asked to select an audio file you have in the system or upload a new audio file from your device. Audio files must be in either MP3, M4A, or WAV formats to be used. The uploaded file will appear next to the blue button once it has been added to the voice campaign.



Choose Audio Type

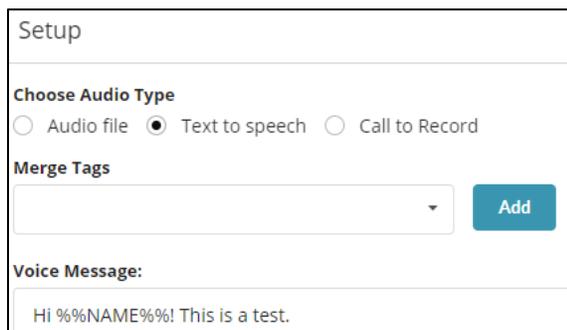
Audio file Text to speech Call to Record

Upload file

Please upload an MP3, M4A, or WAV file.

Text-to-Speech

The text-to-speech functionality allows you to type out the content of your voice message in the textbox provided. Make sure text to speech is selected and the textbox will appear below. Simply type your message into the textbox to create your voice message that will be converted into an automated voice when sent to your contacts.



Setup

Choose Audio Type

Audio file Text to speech Call to Record

Merge Tags

Add

Voice Message:

Hi %%NAME%%! This is a test.

You also have the option to add merge tags to your text-to-speech message. Merge tags are pieces of placeholder text that will pull contacts' specific information from their contact profile in the CRM when the campaign is sent. For example, you can add each contact's name to the message by finding the Name option in the Merge Tags dropdown above the text box and clicking the blue Add button to add the merge tag

to your message wherever your cursor is. When inserted into your message, merge tags are surrounded by two percentage signs and will look something like this: %%NAME%%. This text will be replaced with each contact's name when the campaign is sent. Refer to the *SimplyCast CRM User Guide* for more information about merge tags.

Call to Record

The call to record type allows you to have the system call your phone number, and then record a voice message directly through your phone. To have it do so, enter your phone number into the Enter Number Field, and then select Call Me.



Setup

Choose Audio Type

Audio file Text to speech Call to Record

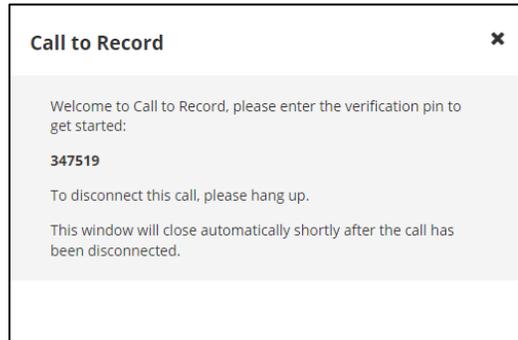
Enter Number

eg. 1 415 555 2671 **Call Me**



Your phone will be called, and you will be prompted with a message containing a verification pin. When you answer the call, the system will ask you to enter the pin. Dial the pin on your phone, and then follow the instructions within the call to create your recording.

First, you will be prompted to press 1 to start the recording. When you are done recording, press the “#” key. The system will then repeat your message. If needed, you can then press the “*” key to record your message again if you need to make any changes. Once your message been recorded and matches what you want, you can then hang up. After a moment, the file will appear below the Enter Number field.



Message Parts

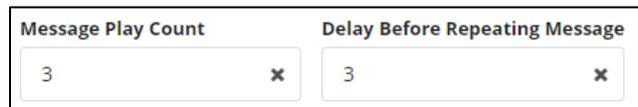


Message parts allow you to combine audio file, text-to-speech, and call to record audio in the same message. To add a part to your message, click the blue “+” button. An additional section will be added to the message, with the same setup voice message content options. You can add up to ten parts to any message.

Message parts will play in the order they’re listed within the setup. To move a part earlier or later in the message, click the up and down buttons to the top left of the part to move it up or down in the order. To remove a part, select the red “X” button on the top-right corner of the part.



Message Repetition



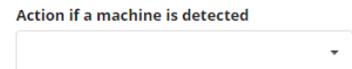
Next, you’re able to configure the number of times the message will repeat, and the number of seconds it will wait between each repeat. To adjust the number of times your message will play, select the Message Play Count dropdown, and select a number of plays from 1 (the message will play one time only) to 5 (the message will repeat five times).

To adjust the delay between repetitions, select the Delay Before Repeating Message dropdown, and select a delay from 1 to 15 seconds. To clear either of these settings, click the grey “X” icon next the them.

Answering Machine Detection



Answering machine detection, when enabled, allows the system to take one of two actions when it detects an answering machine.



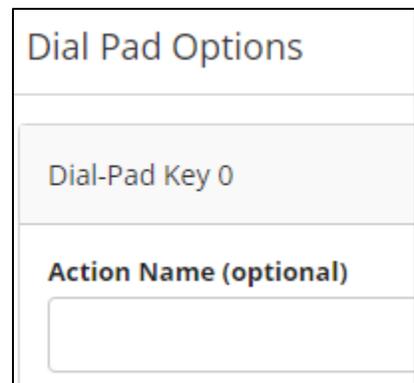
Once detection is enabled, you can then select what action the system should take when it detects an answering machine. There are two options: "Hang up the call" and "Wait for silence". Hang up the call means that the system will hang up the call whenever it detects that it is calling an answering machine. Wait for silence means that the system will wait until there is silence (when the answering machine is taking a message) and then begin playing the message.

[**Note:** This is an experimental feature, it may not always correctly detect an answering machine.]

Configure Dial Pad Options

Once you have finished creating your voice message content, you can then set up your dial pad options. Dial pad options allow recipients of your voice message to trigger one of four specific actions, and may also be used to trigger a specific message to play when the key is pressed.

To configure a dial pad option, first find the dial-pad key you want the action to be associated with and then select the toggle on the far right side of the screen to activate it. If the toggle is green, it is active and can be configured.



Action Name

When you are configuring the message, first you can optionally name the action. This field only appears in the setup and reporting of the message and does not get read out to recipients of the message.

Choose Message Type

Next, you can configure a message to play by selecting one of the message types and uploading, writing, or calling to record the message content. The process works the same as outlined in the Create Voice Message Content section.

Choose Action Type

Finally, each Dial-Pad Key allows you to configure one of four actions that will be taken when a recipient dials the associated dial-pad key:



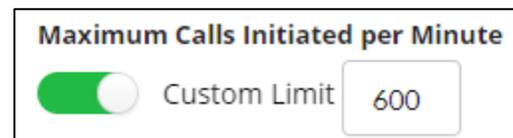
- **No action:** When the corresponding key is dialed by a recipient, no action will be taken. Dialing the key will only cause the associated message to play.
- **Connect to external number:** When the corresponding key is dialed by a recipient, the recipient of the message will be transferred and connected to the external number indicated in the “Enter number to connect to” field.
- **Unsubscribe Recipient:** When the corresponding key is dialed by a recipient, the recipient of the message will be unsubscribed from your voice campaigns.
- **Repeat Message:** When the corresponding key is dialed by a recipient, the message will repeat.

[**Note:** By default, two dial pad options are already configured. Dial-Pad Key 9 is configured by default with the unsubscribe recipient option and a short text-to-speech message informing the recipient that they will be unsubscribed shortly. Dial-Pad Key * is configured with the repeat message option. While these can be changed, it is strongly recommended that you always include an unsubscribe option.]

Call Limiting

The next part of the campaign setup is configuring the optional Call Limiting options. Call limiting allows you to limit when and how voice message calls go out. There are four options for call limiting, and each can be activated by clicking the corresponding toggle and setting it from disabled to enabled.

Maximum Calls Initiated per Minute

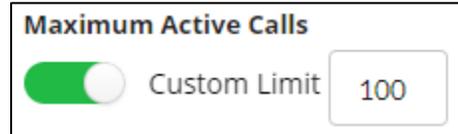


Setting the Maximum Calls Initiated per Minute sets a maximum limit on the number of calls that the system will have go out at once. When enabled, this limit allows you to limit the number of calls that go out at once ensuring that no more than the indicated volume will ever go out at the same time over the duration of the voice campaign. To set the limit, enter a number in the space provided next to the toggle.



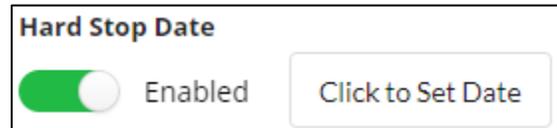
Maximum Active Calls

Similarly, Maximum Active Calls limits the total number of calls that can be active at the same time. When enabled, this limit allows you to limit the number of calls actively occurring at once, ensuring that there are never more than the indicated number of calls occurring. To set the limit, enter a number in the space provided next to the toggle.



Hard Stop Date

The Hard Stop Date option allows you to set a date after which no calls will go out. This option is especially useful for time-sensitive offers or information, because when enabled it will prevent any calls from being started after the date and time you select. You can set the hard stop date by clicking the Click to Set Date button next to the toggle and then selecting a date and time.



Allowed Sending Ranges



The allowed sending ranges option allows you to configure the times during each day of the week that voice messages are allowed to send. This can be used to ensure that larger campaigns don't call anyone at less ideal times (for example, late at night).

To configure the ranges, you have a few options. First, you can enable or disable a day of the week by selecting the toggle next to that day of the week. For the days where sending is enabled, you can then use the dropdowns to configure the time range that messages can be sent between. The system will then only start calls to recipients during those indicated hours.

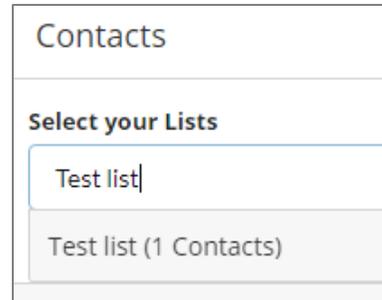
[Note: The starting time you list for each day of the week must occur earlier in the day than the stopping time.]

Choosing Contacts

Clicking the Next button at the bottom right of your screen after configuring your voice project will bring you to the Contacts and Scheduling page. The first step on this page is to select the contact list(s) to send the voice campaign to.

To select your list(s) of contacts:

- Click the dropdown menu under the Select Your Lists field.
- All your current lists will appear. Select as many as you like.
- If you are looking for a particular list, begin typing the name of the list in the “Search for a list field.” The list options will automatically be filtered.
- Continue adding lists this way until you have selected all you need. To close the dropdown menu, click anywhere else on the screen.



The screenshot shows a 'Contacts' interface. At the top, it says 'Contacts'. Below that is a section titled 'Select your Lists'. There is a search input field containing 'Test list'. Below the search field, a dropdown menu is open, showing a single result: 'Test list (1 Contacts)'.

[Note: The system is able to dial phone numbers that use extensions. The format for storing extension information in a contact’s CRM Phone field is [Phone Number]x[Extension Number].]

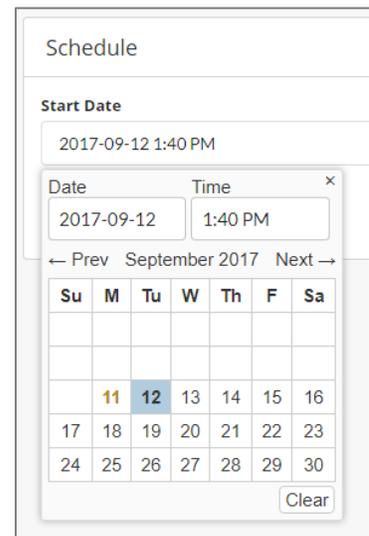
Schedule Your Campaign

After selecting your lists from the Contacts section, you must choose when to schedule your campaign in the Schedule section below.

You have two options for scheduling your campaign: Start Date or Send Now.

Start Date

Select the date and time when you wish to send your voice campaign by locating the Start Date field. This field, when clicked, will display a dropdown calendar allowing you to when to send your campaign.

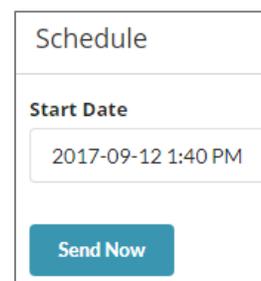


The screenshot shows a 'Schedule' interface. At the top, it says 'Schedule'. Below that is a section titled 'Start Date'. There is a text input field containing '2017-09-12 1:40 PM'. Below this field is a date and time picker. The date picker shows a calendar for September 2017. The date '12' is selected. The time picker shows '1:40 PM'. There are 'Prev' and 'Next' buttons for the calendar, and a 'Clear' button for the time picker.

Choose the day from the calendar and enter the time in the Time field above. If you wish to select a new day and time, click the Clear button to start over.

Send Now

You have the option to deploy the campaign immediately following its completion by clicking the blue Send Now button that appears below the Start Date field. You will be redirected to the Crosscheck page to complete the setup process.

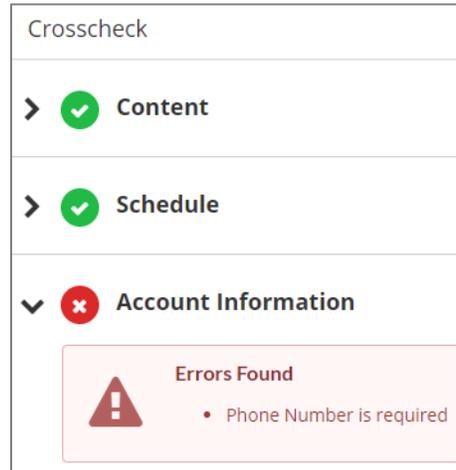


The screenshot shows a 'Schedule' interface. At the top, it says 'Schedule'. Below that is a section titled 'Start Date'. There is a text input field containing '2017-09-12 1:40 PM'. Below this field is a blue button labeled 'Send Now'.

Crosscheck



Once you click the Next button to complete the contact and schedule setup, a crosscheck page will appear to let you know if you have configured your project correctly and if there are any sections that need to be fixed before the project can send. If the checkmark circles next to each section are green, the project can be sent. If there are yellow circles, that means there is a minor issue with the project but it can still be sent. Red circles mean you must go back into the project and make the necessary changes before the project can be sent. Each crosscheck section will explain any issues that were encountered and provide you with a blue Edit button, which will take you back to that section to fix any errors. Click the Complete button at the bottom right-hand corner of your page once your project is cleared for sending.



Unsubscribes

Add to Unsubscribe List						Search...
Voice Phone Number	Unsubscribe Date	Actor Who Unsubscribed	Source Mechanism	Campaign Type	Associated Campaign	
[REDACTED]	Apr 16th, 2023 9:10 PM	Account User	Unsubscribes Tool or the API			

Selecting the Unsubscribes tab in the left-hand menu will direct you to the Voice Unsubscribe List. Here you can view and download the unsubscribe list as well as manually add phone numbers to this list.

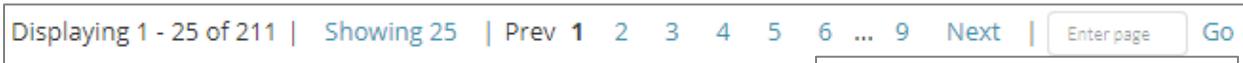
[**Note:** You may not contact anyone in the unsubscribe list per SimplyCast’s Terms and Conditions.]

In the Unsubscribe List, there are six fields:

- **Voice Phone Number:** The phone number added to the unsubscribe list.
- **Unsubscribe Date:** The date and time the voice phone number was added to the unsubscribe list.
- **Actor Who Unsubscribed:** The individual who unsubscribed the contact (generally, either the contact themselves or an account user)
- **Source Mechanism:** The source mechanism of the unsubscribe.
- **Campaign Type:** The type of campaign that the source mechanism was associated with.
- **Associated Campaign:** The specific campaign that the source mechanism was associated with.



To view a phone number that does not appear on the first page of the unsubscribe list, navigate to the bottom of your screen where you will find the page numbers. Proceed to another page of phone numbers by clicking the page number you would like to visit. The Next button will take you to the next page of phone numbers or enter the page number in the textbox provided and click Go. Choose how many numbers to display at once by clicking on the "Showing..." link located to the right of the number of displayed phone numbers.



To find a particular phone number, use the search bar located at the top right of the screen above the unsubscribe list. As you type in the name of the number, the results will automatically filter.

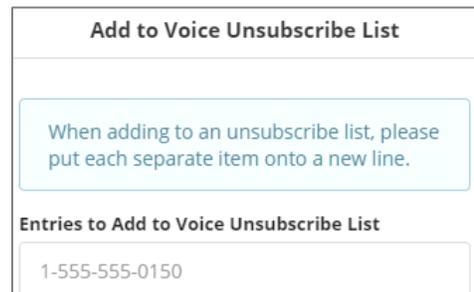


To manually add contacts to the Voice unsubscribe list:

- Click the blue Add to Unsubscribe List button above the Voice unsubscribe list.
- In the sidebar on the right side of the screen, type each phone number that you would like to manually unsubscribe in the textbox provided. Each new number must be entered on a new line.



Once you have entered all the numbers to unsubscribe, click the blue Add to List button located below the textbox. Or, click Cancel to close the sidebar without adding any contacts to the unsubscribe list.



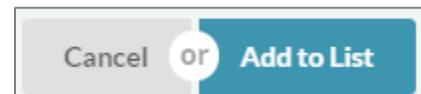
[Note: Once a phone number is added to the unsubscribe list, it cannot be removed. The contact can re-subscribe to your sending list through a signup form or another method but cannot be removed from the unsubscribe list manually. This is a security feature added to ensure unsubscribed contacts won't receive messages if they don't wish to.]

To download the unsubscribe list, click the blue download button located at the top right of the page. You can choose to download the list as a CSV or XLSX file. You will then be redirected to the Downloads page, where you must click on the list you wish to download and click



the blue Download Report button that will become active. The list will be downloaded to the

Downloads folder of your device.



Reports



To view a report for any of your voice campaigns, you must navigate to the SimplyCast Reporting interface:

- Go to the main Voice Dashboard tab on the left-hand side of your screen.
- Click the Reports option to be directed to the Reports page.

Once in the Voice Reporting Dashboard, you are able to:

View the List of Reports

When you enter the Voice Reports Dashboard, you should immediately see a list of all the voice campaigns you have deployed with the most recent project being at the top of the list. If there are no projects in the list, none have been created.

Each report in the list is broken down into ten columns:

- **ID:** A unique ID associated with the campaign for use with issue reporting
- **Name:** The name you gave to the voice campaign when you created it
- **Message:** The voice message content you created
- **Files:** The file path of any files associated with the message
- **Status:** Whether the project is scheduled, transactional, sending, aborted, active, complete, or unknown
- **Sent Time:** The date and time the voice message was deployed
- **Queued:** The total number of voice messages queued to send
- **Sent:** The total number of voice messages that were sent out
- **Failed:** The total number of contacts the voice message failed to send to
- **Price:** The total cost of the voice campaign
- **Lists:** The name of the contact list(s) to whom the project was sent

	ID	Name	Files	Status	Sent Time	Queued	Sent	Failed	Cost	Lists
<input type="checkbox"/>	1812	Voice	Example Message	Transactional	-	0	0	0	C\$ 0.0000	

Navigate Multiple Pages of Reports

If you have enough voice reports, they will be displayed on multiple pages in the Reports Dashboard. To view a report for a project that does not appear on the first page, navigate to the bottom of your screen where you will find the page numbers indicating the total number of voice campaigns. Proceed to another page of reports by clicking the page number or the Next button. You can also choose how many reports to display by clicking on the "Showing..." link located to the right of the number of displayed projects.

Search Reports

If you are trying to find a particular voice campaign for which to view the report, use the search bar located at the top right of the screen above the list of all the reports in the main Voice Reporting page.

As you type in the name of the report you are searching for, results will automatically be filtered.

Filter Reports

You can filter your voice reports to show projects from a particular date, at a particular time, or within a certain window of time.

To filter your voice campaigns:

- Find the gray Filter button located at the top right-hand side of your screen in the main Voice Reporting page, directly above the list of projects, beside the search bar.
- Click the Filter button and a dropdown menu will appear in which you will see two boxes that say Click to Set Date.
- Click either box and another dropdown menu will show up with two fields labeled Date and Time in which you can manually insert the date and time you would like to filter Voice reports from. Below these fields there is a calendar you can also use to choose the date you would like to filter reports from.
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your reports, which will close the dropdown menu.

View Reports



To view the report of a particular voice project:

- Select the voice campaign you would like to see the report for by checking off the box that appears to the left of the project's title.
- The blue View Report button on top of the project list will become active and able to be clicked on once you have checked off a voice campaign.
- Click View Report and you will be directed to the report for that particular voice campaign.

Overview Tab

The first section you will see in the report of a particular voice campaign is the Overview tab.

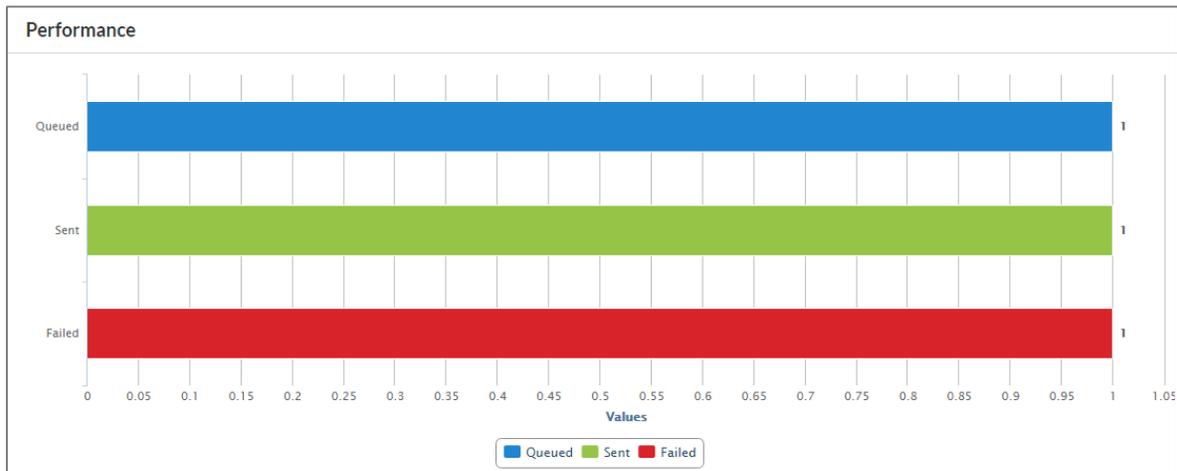
This page will display up to six separate boxes with the following information:

- **Queued:** The number of voice messages the system attempted to send
- **Failed:** The total number of contacts your voice campaign failed to send to

- **Sent:** The total number of contacts your voice campaign has reached up until this point
- **Price:** The total cost of sending the voice campaign
- **Time Sent:** The date and time the voice campaign was deployed to your contacts
- **Status:** The current status of the voice campaign

Performance

The second section in the Report Overview Tab is the Performance section where you can see a graph of which contacts received your voice message and any messages that failed to reach their destination.



Message

The third section in the Report Overview Tab is the Message section where you can review the voice message that was sent out to your

contacts. If your voice message included an audio file (including files created using the call to record option), you are able to play the file as well as download it to your device.



Lists

The fourth section in the Report Overview tab is the Lists section. This section is where you can see a breakdown of each of the lists the voice campaign was sent to. This section is broken down into four columns:

- **Name:** The name of the list you sent the voice campaign to
- **List Size:** The number of contacts in each list you sent to
- **Queued:** The number of voice messages that were queued to send



- **Sent:** The number of voice messages that were actually sent

Lists			
Name	List Size	Queued	Sent
Example List	4	4	4

Dial Pad Options

The fifth section in the Report Overview tab is the Dial Pad Options section. This section is where you can see a breakdown of each of the dial pad options and the count of how many times each action was taken. This section is broken down into three columns:

- **Action:** The type of action taken
- **Name:** The name given to the action (if any)
- **Count:** The number of times recipients triggered the action

Dial Pad Options		
Action	Name	Count
No action taken	(unconfigured)	1

Activity Tab

Next to the Overview tab located at the top of the voice project report, you will see the Activity tab where, when selected, you can choose from two activity options to view the information for:

- Queued
- Calls

Activity ▾
Queued
Calls

Queued

The Queued section in the voice report displays the contact information pertaining to the messages that were queued to send as part of your voice project. The section is broken down into four columns of information:

- **Name:** The name of the contact the voice message was queued to send to
- **To Number:** The phone number the voice message was set to send to
- **List:** The list the contact belongs to
- **Status:** The current status of the voice message



Calls

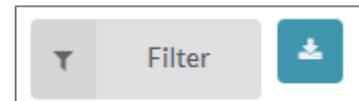
The Calls section in the voice report (under the Activity tab) displays the contact information pertaining to all calls made as part of your voice campaign, whether they were successful or not. The section is broken down into six columns of information:

- **Phone Number:** The phone number that was dialed
- **Answered At:** Either the date and time the call was answered or “Not Answered” if it wasn’t
- **Ended At:** The date and time the call was ended
- **Call Duration:** The length of time the contact remained on the line listening to the voice message
- **Billing Duration:** The length of time the system will bill the call for rounded up to the next minute
- **Call Cost:** The total price of the call

Activity: Calls					
Phone Number	Answered At	Ended At	Call Duration	Billing Duration	Call Cost
+18358974x1301	Not Answered	Sep 16th, 2019 10:38:07 AM	00:00:00	00:00:00	\$ 0.0000
+10033036038	Sep 16th, 2019 10:38:20 AM	Sep 16th, 2019 10:39:34 AM	00:01:14	00:02:00	\$ 0.1900

Displaying 1 - 2 of 2 | Showing 25 | Prev 1 Next | Enter page | Go

Filter Reports



You have the ability to filter your voice report to show messages sent on a particular date, at a particular time, or within a certain window of time, as well as by a particular contact list.

To filter your messages:

- Find the gray Filter button located at the top right-hand side of your screen, directly above the Activity section.
- Click the Filter button and a dropdown menu will appear where you will see two boxes that say Click to Set Date.
- Click on either Click to Set Date box and another dropdown menu will show up with two fields labeled Date and Time.
- Manually insert the date and time you would like to filter your reports from.
- Below the Date and Time fields there is a calendar you can also use to choose the date you would like to filter messages from.
- Additionally, you can filter your report using specific contacts. You can select a field and then search for a specific contact using the information associated with the contact in that field,
- You can also filter your report by contact list. Click the Choose a List field and type in the name of the contact list you would like to use to filter the report.



- Options will automatically be filtered to match the text.
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your report. This will close the dropdown menu.

[**Note:** To clear an applied filter, select the now green Filter button again and click Clear.]

Download Reports



To download the entire Voice report to your device, there is a blue download button located to the right of the Filter button, on top of the Activity tab in the report.

When you click the download button:

- A dropdown menu will appear with two file formats to choose from.
- Choose to download the report in either CSV or XLSX format by clicking the appropriate option in the dropdown menu.
- You will be directed to the Downloads page with all your requested downloads that will show the name of the report, the status, the file type, and the date it was created.
- Select the report you wish to download and click the blue Download Report button to complete the download.
- The page will continue to refresh until the download is complete.

Compare Reports

Compare Reports allows you to have two or more Voice reports placed side by side for a comparative analysis.

To compare multiple reports:

- Manually insert the date and time you would like to filter your reports from.
- Below the Date and Time fields there is a calendar you can also use to choose the date you would like to filter messages from.
- You can also filter your report by contact list. Click the Choose a List field and type in the name of the contact list you would like to use to filter the report.
- Options will automatically be filtered.
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your report. This will close the dropdown menu.
- On the main Voice Reporting Dashboard, check off the boxes next to the name of the reports to compare.
- When more than one voice campaign has been checked off, two new blue buttons will appear next to the View Report button at the top of the list of reports.
- Click the Compare Reports button located on the left-hand side of these two new buttons and it will direct you to a copy of the report.
- Refer to the *View Reports* section for a breakdown of the elements of the report.

- In each section of the report you will see the information from each separate voice campaign displayed one after the other for simple comparison.

Voice Reports									
<input type="button" value="View Report"/> <input type="button" value="Compare Reports"/> <input type="button" value="Combine Reports"/> <input type="button" value="Filter"/> <input type="text" value="Search..."/> 									
<input type="checkbox"/>	Name	Message	Status	Time Sent	Queued	Sent	Failed	Price	Lists
<input checked="" type="checkbox"/>	test1	this is a test. please do not respond.	Sending	2016/08/03 11:24 AM	1	0	0	\$0.00	Test List 2
<input checked="" type="checkbox"/>	test2	this is a test. please do not respond.	Sending	2016/08/03 11:23 AM	1	0	0	\$0.00	Test List 2
<input type="checkbox"/>	test4	testing the voice text to speech functionality. please ...	Sending	2016/08/03 11:21 AM	1	0	0	\$0.00	Test List 2

Combine Reports

Combine Reports allows you to take two or more Voice reports and merge the data together into a single report.

To combine reports in the Voice Reports Dashboard:

- Check off the boxes next to each of the project names of the reports you would like to combine.
- When more than one Voice campaign has been checked off, two new blue buttons will appear next to the View Report button at the top of the list of reports.
- Click the Combine Reports button located on the right-hand side of these two new buttons and it will direct you to a copy of the merged report.
- Please refer to the *View Reports* section for a breakdown of the elements of the report.

Document History

Version Number	Date	Changes
1.0	12.05.2018	Document Finalized
1.1	9.16.2019	Updated document to reflect changes in UI
1.2	9.26.19	Reviewed
1.3	4.24.23	Updated document to reflect app updates.

