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1. Introduction

This user manual allows you to learn the basic to the advanced features of Xtend Outbound Dialer. Just follow through the user guide for thorough knowledge on how to use our product with ease. This guide gives details about various menus and sub-menus and the various functions/purpose of each with a screenshot of it.
2. About Xtend Outbound Dialer

Xtend Outbound Dialer (OBD) is a computer-based application designed to automate the outbound calls in an organisation. The computer telephony integrated solution with enhanced call dialling functionalities, DND management, voice recording and much more allows an organisation to design customised campaigns in multilingual languages. Xtend OBD dials out multiple calls automatically and processes the outbound calls in a faster way. Implementation of Xtend OBD in an organisation simplifies the process of call handling to a large extent. These results in overall productivity with perfect control over call operations in an organisation. The Outbound Dialer implements a user-friendly browser interface that allows configuring and prioritising multiple processes targeted for multiple purposes. Xtend OBD serves as a powerful telemarketing tool to promote the company products, brands and offers in different languages.

Salient Features

- Multi-line operational mode
- User-friendly and feature-rich browser interface
- Multi-login facility with authentication
- Import call list in CSV format
- Supports multiple processes
- Complete process activity reports
- Add, edit and set priority for processes
- Enhanced multi-lingual prompt support
- Advanced search options
- Powerful data export

3. System Requirements

To use Xtend OBD on a Windows PC, you must have at least the following specification:

- **Operating System**: Windows Server 2008/Windows 7/8/10
- **Browser**: Internet Explorer 8.0 or above
- **Processor Type**: Intel Quad Core (in case of single PRI)  
  Intel Xeon Server Class Processor (in case of multiple PRI)
- **Processor Speed**: 2.5 GHz or more
- **Memory**: 4 GB or above
- **Hard Disk Space**: 1 TB or above

*Note: The minimum system requirements mentioned here shall vary based on the actual user requirements.*

4. Browser Interface at a Glance

4.1. How to Login to Xtend OBD

Go to **Start → All Programs → Xtend OBD → Login**. Type “admin” as username and password to login to the browser interface of Xtend Outbound Dialer. There are two options available, **Login** and **Reset**.
4.2 Home Page with Menus & Submenus

The interface can be subdivided into three sections - Upper Panel, Left Panel and Text/Graphical area.
Upper Panel

→ Click the icon to logout from Xtend OBD

→ Click the icon to view the Home page

→ Click the icon to know the version of Xtend OBD

Login information displays the current user who has logged in

Left Panel

The Menus and Submenus are displayed on the Left Panel. The menu items comprises of Process Status, Process, Active Reports, Passive Reports, Administration, System Logs, Configuration, Manage Device.

Text/Graphical Area

Text/Graphical area displays the information related to user selection of menu items from the Left Panel.

5. Menu & Submenu Options

5.1. Process Status

The menu gives the information about the real-time status of individual processes. The different process status comprises of Live Calls, Active, Inactive, In Queue, Active Configuration. The live call details of individual process can also be viewed.

5.1.1. Live Calls

This submenu shows the real-time call information. The information includes individual process which includes process id, call time, phone no., type of call and call status. Also, the count of total active calls can be seen.

<table>
<thead>
<tr>
<th>Process</th>
<th>Call Time</th>
<th>Phone No</th>
<th>Type</th>
<th>Status</th>
</tr>
</thead>
</table>

Status indicator appears black when there is no active live call available and also there will not be any phone number, type and call time in the status screen. When the call becomes active the status will be shown in blue, when the user attends the call, the status changes to green as shown in the above screen. At the time when the call became active the phone number, type and call time will be visible in the screen.
5.1.2. Active

This submenu shows the processes that are currently active. The details of active process include Process name, Start date, End date, Remaining call details, etc. On the bottom of the page the total count of active processes can be seen. The icon on the right end is to pause the process, which are currently in running mode.

![Active Process Table]

5.1.3. Inactive

This submenu shows the process which are currently inactive/not running. The information on inactive process include process name, phone number, starting date and ending date, the reason why the process is in inactive mode etc. On the bottom of the page the total count of inactive processes can be seen.

![Inactive Process Table]

To enable the process, click the icon in the above window, a prompt appears asking to make sure of enabling the process.

Click OK to confirm enabling the process.

5.1.4. In Queue

This submenu shows the processes that are in queue (the process which has not been active/started yet) with upcoming start on dates. The information in the In Queue process include process with phone number, starts on and ends on dates as shown in the below screen.

![In Queue Process Table]
5.1.5. Active Configuration

This submenu shows overall information of the channels that are active for processes. The information in the active configuration include process name, start on, ends on, channel from, channel to, total channels and allocated channels. It also shows the total number of configured processes as shown in the below screen.

![Active Configuration](image)

5.2. Process

This menu gives the details about the process created, list of processes, information about the data/waves added or uploaded to individual processes, configuration of each processes, configured process details and finally the processes which were deleted.

5.2.1. Process

This submenu allows the user to view and edit the process, which were already created. New process can be added and it is possible to view the details of existing processes.

Add Process

Click *Add Process* to add/create a new process. An Example: A Process named “Election” creation is shown below.

- **Process Name** - Specify name of the Process to be created e.g. Election.
- **Process's Phone Number** - Specify any valid number e.g. 3011000. This phone number will be displayed in the customers phone while on call.
- **Start on and End on dates** - Select starting and ending dates from the date picker.
- **Schedule Start and Stop Time** - Select the time.
- **Voice Logging** - Specify whether the calls needs to be logged or not.
- **Process Type** - Select the type from the drop-down list (Non-Interactive, Interactive, Externally Handled).
- **Process Description** - Specify a brief description about the process.
- **Wave Path** - Specify the wave path for the process. All recorded calls will be saved in this location.
- **Upload Custom CSV file** - Specify CSV file to be uploaded or not. If user needs to update the details (for e.g. Name, Address) other than phone number, this field is set as *Yes*.
- **Number of dial attempts** - Specify the maximum number of times user can attempt to dial a call.
- **Call Handling** - Specify the kind of calls to be handled e.g. incoming/outgoing or both.
It is possible to view and edit the process, which are already created. Select the process and click **View & Edit** to update it. Click **Delete** to delete the process.

Specific **View & Edit** screen for a process is shown below. To update the process, click **Update Process**.

**Note:** Active Process cannot be edited. You have to disable the process to edit it.
Click **Process List** to view the details of all the created processes. The information in the Process List include process id, process name, created by (shows the username with Admin privilege), process status, starting and ending dates of each processes, waves etc. The total count of created processes will be also shown.

<table>
<thead>
<tr>
<th>Process ID</th>
<th>Process Name</th>
<th>Created By</th>
<th>Status</th>
<th>Starts On</th>
<th>Ends On</th>
<th>Waves</th>
<th>List Schedule</th>
<th>Process Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>test</td>
<td>admin</td>
<td>Disabled</td>
<td>9 Apr 2016</td>
<td>9 Apr 2017</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Election</td>
<td>admin</td>
<td>Disabled</td>
<td>2 May 2016</td>
<td>18 May 2016</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

User have the ability to edit or view the process by clicking a particular row and user can manage Waves, Process Schedule and Process Number from here by clicking the respective icons.

**Wave List**
Click the wave icon present in the Process List window and the below screen appears. Two options play and stop are present for each wave. To unload a particular wave from the list shown, select a wave and click **Un-load Waves**.

To re-load waves, select a wave and then click **Re-Load Waves**.
View Process

If the process is currently active, then on clicking any of the rows in the process list, the View Process screen appears as shown below. The entire process details can be viewed from here. If the process is inactive, then the Edit Process screen will be displayed on the screen.

5.2.2. Add Data

This submenu allows the user to upload data and waves to a particular process. Select a particular process from the list and click Upload Data or Upload Waves to add data.

Uploading data to a particular process

Select Data File (CSV/XLS): Data can be in CSV/XLS file format which contains the numbers. Other fields like name, address, number of ports etc. are optional. Specify the path of data to be uploaded. Click Browse to browse the data path, for e.g. C:\Documents and Settings\Numbers.

Column Heading Exist: Choose Yes from the list if column heading exists, else select No.

Lead Name: This refers to a unique name given to the process-specific data during uploading, which allows the user to carry out lead-wise searching and information retrieval. It is possible to either enable or disable a lead. If it is enabled, the auto dialler dials a list of phone numbers in that particular lead. After completing the numbers in the currently enabled lead, the next enabled lead will be dialled and so on.

Activate Lead Now: Specify Yes if the current lead has to be activated, else select No. If it is set
Yes, dialout immediately initiates from this particular process, if the process is running. Click **Upload Data** to append the data.

Data Preview appears on the screen. The preview of data which has to be uploaded is shown below. For a customised CSV file, the other details along with the phone number will be listed.

Uploading waves to a particular process: Specify the path where the wave file is located and click **Upload Files** to upload the wave files. The wave should be uploaded in “.wav” format. Wave options will be available in different format such as welcome wave, option wave, thank you wave and user can customise this wave to any language. These waves should be uploaded.

5.2.3. Configuration

This menu allows to select the type of configuration for each created process in the Outbound Dialer. The process can be configured as either **Count wise** or **Range wise**.
Configuration - Count Wise

In Count Wise Configuration, click the checkbox to enable the process and input the maximum channels for each process. Click *Configure* to proceed.

On successful configuration, the below screen appears, displays the active process details after process configuration.

Configuration- Range Wise

In Range Wise Configuration, the user needs to enable the process by clicking on the checkbox and also enter the start channel number and end channel number. Finally, click *Configure* to finish the configuration.
On successful configuration, the below screen shows up. The information includes details of active processes and total count of configured processes.

5.2.4. Custom Field

This submenu allows to add new field to a process or allows to import field from another process.

By clicking *View Fields* on the bottom of the screen, the information appears as shown in the below screen. By default, phone number, called time and call type will be shown. It is system-generated field and cannot be modified. New field can be added and any field can be imported from one process to another.
5.2.5. DND

Do not disturb option allows to block unwanted incoming calls which is black listed and outgoing calls that are restricted from calling. There are two types, outgoing and incoming.

**Outgoing**

By selecting the outgoing option and process, click *View DND List*. This will display the already uploaded phone number. The option *Add Number* helps the user to select and add numbers for DND.

**Upload DND List - Outgoing**

It consists of an option *Choose File* to upload a CSV/XLS file from your computer. Click *Upload* to finish the uploading and click *Preview* to view the uploaded file.

**DND List-Outgoing**

Displays the list of phone numbers that are labelled as DND.
Incoming
When the incoming icon is invoked, the below screen will appear which shows the list of numbers or the numbers to be entered for call blocking.

Upload DND List- Incoming
It consist of an option Choose File to upload a CSV/XLS file from your computer. Click Upload to finish the uploading and click Preview to view the uploaded file.

DND List-Incoming
Shows the phone numbers which are blocked under incoming DND call list.

5.2.6. Deleted Process
This submenu gives the details of deleted processes. The information includes the process name, the user who has deleted the process and the date when the process has been deleted. On clicking the individual field, the details of the process can be viewed.
5.3. Active Reports

This menu gives the detailed report of currently active processes. The information includes details about the Data, Process Logs, Dialled Logs and Export Logs.

5.3.1. Data

The first submenu in the active reports is the data. This submenu allows user to add/view the Data Logs.

The Data Logs page will appear as shown below.

<table>
<thead>
<tr>
<th>Lead Name</th>
<th>Added On</th>
<th>Added By</th>
<th>Total Data Added</th>
<th>Data Deleted</th>
<th>Lead Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>29 Apr 2016</td>
<td>admin</td>
<td>1</td>
<td>0</td>
<td>Active</td>
</tr>
<tr>
<td>2</td>
<td>29 Apr 2016</td>
<td>admin</td>
<td>1</td>
<td>0</td>
<td>Inactive</td>
</tr>
<tr>
<td>Test 1</td>
<td>9 Apr 2016</td>
<td>admin</td>
<td>2</td>
<td>0</td>
<td>Completed</td>
</tr>
<tr>
<td>Test 2</td>
<td>9 Apr 2016</td>
<td>admin</td>
<td>2</td>
<td>0</td>
<td>Completed</td>
</tr>
<tr>
<td>Test23</td>
<td>9 Apr 2016</td>
<td>xtend</td>
<td>3</td>
<td>0</td>
<td>Completed</td>
</tr>
<tr>
<td>Test23</td>
<td>9 Apr 2016</td>
<td>xtend</td>
<td>18</td>
<td>0</td>
<td>Completed</td>
</tr>
</tbody>
</table>

The information in this page include lead name, date added on, added by details, total number of data added, total number of data deleted, lead status (shows whether a particular lead is completed or not). The icon shown here is for searching call details of each respective entry, view all, enable/disable lead, delete entries and the list of duplicate entries within a particular lead.

5.3.2. Process Logs

This submenu allows the user to fetch the logged call details of individual processes. The search criteria include process name, data added from, data added to, added number, call type (incoming/outgoing/both), status (success/failed), retried times etc.
The search result page will be displayed as shown in the below screen. The information includes the call details of selected process like phone number, added on, status, call type (incoming/outgoing/both) and called on date. At the top of the table, user can see the process name and the total number of call logs. The details of each row will be available by clicking the row.

5.3.3. Dialled Logs

This submenu allows detailed search of active processes within the specified date range. Apart from the simple search criteria, here the user can fetch details based on call duration less than/greater than a particular time.
The search result is shown here. The information includes the call details of the selected process like phone number, called on date, status, call type, call duration, accepted keys and channels. The icon at the end is to playback the logged calls.

The Process Log details like phone number, status, call type, called date, added date can be exported. Click the link **EXPORT** and select the contents. The details can be exported and downloaded.

5.3.4. Export Logs

The log details of individual process can be exported to CSV file. The export details include export id, exported on, exported by and total data exported. Select a process from the list and click **View Export Logs** to refer the exported details.
The Export Logs data is shown below.

<table>
<thead>
<tr>
<th>Export ID</th>
<th>Started On</th>
<th>Ended On</th>
<th>Exported By</th>
<th>Total Data Exported</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>9 Apr 2016 15:40:02</td>
<td>9 Apr 2016 15:40:02</td>
<td>ADMIN</td>
<td>34</td>
</tr>
<tr>
<td>2</td>
<td>9 Apr 2016 14:43:12</td>
<td>9 Apr 2016 14:43:12</td>
<td>Xtend</td>
<td>18</td>
</tr>
</tbody>
</table>

The Process Log details like phone number, status, call type, called date, added date can be exported. Click the link `EXPORT` and select the contents. The details can be exported and downloaded.

5.4. Passive Reports

This menu gives the information about the currently inactive processes such as the process which are not configured, date over process, timeout process etc. A date-wise searching of inactive process details can be done. The information includes details about the Data, Process Logs, Dialled Logs and Export Logs.

5.4.1. Data

This submenu lists the data added for the processes that are currently inactive.

The data logs is shown below. The Process Log details like phone number, status, call type, called date, added date can be exported. Click the link `EXPORT` and select the contents. The details can be exported and downloaded.

5.4.2. Process Logs

This submenu displays the log details of processes, which are currently in inactive state. The date range is chosen from the date picker. On the basis of specified date range, added number, call type, status, retried times etc., can be viewed.
The search result page obtained is shown as below.

The Process Log call details like phone number, status, call type, called date, added date can be exported. Click the link **EXPORT** and select the contents. The details can be exported and downloaded.

### 5.4.3. Dialed Logs

This submenu displays the dialed log details of processes. The date range is chosen from the date picker. On the basis of specified date range, process name, called number, call type, status, call duration less than/greater than, channel etc., with logged details can be viewed.
The search result page obtained is shown below. The logged information includes the call details like phone number, called on date, call status, call type, call duration, accepted key, on channel details, etc. The particular logged data can be played back by clicking the icon at the right end.

The Dialled Log with details like phone number, call status, accepted key, call type, called date, time duration, on channel can be exported. Click the link EXPORT and select the contents.

5.4.4. Export Logs

This submenu gives the exported details of processes. Choose any process from the option “Select Process” and click View Export Logs to view the exported logs of the particular process.
The details obtained are shown below. The information includes export id, started on and ended on dates, exported by and total exported data.

5.5. Administration

The administration menu helps to perform a variety of user account management functions. Multiple users can be created and assigned access rights/privileges. The privileges assigned can also be modified.

5.5.1. User Account

This submenu is for adding new user and editing the existing ones. There is an option to select the user type by selecting the checkbox corresponding to Administrator and Supervisor. Enter the details like real name, mobile number, session duration, list count etc. The password can be changed from here. After entering the relevant details, click OK.

Adding New User: To add a new user, click the link Add User. Enter the details like login name, real name, session duration, user password. After entering the details, click OK.
User List: To view the user list, click the link List Users. The User List appears along with information like user id, user name, real name, role, suspended account and mobile number.

![User List](image1.png)

Deactivation of User: To deactivate the user, click the link Deactivate User and a confirmation screen will appear as shown below. Click Yes to deactivate the user.

![Deactivation Screen](image2.png)

5.5.2. Auto Upload

This submenu allows the system to automatically upload the Excel/CSV data (i.e., phone numbers) at a specified time. Specify the Process to which the data should be uploaded. The Upload Type can be set to either Once or Recursive. If it is set as Once, then the data will be uploaded only during the specified Run Time. If it is set as Recursive, the time interval (in seconds) should be specified and the upload repeats automatically after each interval. For example, if the specified time interval is 60 seconds, the upload repeats after every 60 seconds and dialout happens automatically if the field named Activate Immediately is set as Yes. For both type of uploads, the File Path, File Name, Active Immediately (Yes/No) and Column Heading Present (Yes/No) should be specified.

Note: For the Auto Upload to be working, the application and the process should be kept running.
5.6. System Logs

The system logs enables to select and view session log entries for a period of time and also provides vital information about the errors.

5.6.1. Error/Info

This submenu shows the details of the errors that had occurred in the outbound dialling system. It consists of the time of an error along with the complete details of the error or information as shown as below.
5.6.2. Session

This submenu shows the details of all Sessions including the login time and logout time.

<table>
<thead>
<tr>
<th>User Name</th>
<th>Login Time</th>
<th>Logout Time</th>
<th>Duration</th>
<th>Login IP</th>
<th>Logout Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADMINISTRATOR</td>
<td>3 May 2016 10:08:16</td>
<td>3 May 2016 10:08:16</td>
<td>0:00:06</td>
<td>192.168.14.0.1</td>
<td></td>
</tr>
<tr>
<td>ADMINISTRATOR</td>
<td>30 Apr 2016 10:34:17</td>
<td>30 Apr 2016 10:34:17</td>
<td>0:00:17</td>
<td>192.168.14.0.1</td>
<td>Expired</td>
</tr>
<tr>
<td>ADMINISTRATOR</td>
<td>29 Apr 2016 17:18:22</td>
<td>30 Apr 2016 10:34:17</td>
<td>0:00:55</td>
<td>192.168.14.0.1</td>
<td>Expired</td>
</tr>
<tr>
<td>ADMINISTRATOR</td>
<td>29 Apr 2016 17:17:35</td>
<td>30 Apr 2016 10:34:17</td>
<td>0:00:22</td>
<td>192.168.14.0.1</td>
<td>Expired</td>
</tr>
<tr>
<td>ADMINISTRATOR</td>
<td>13 Apr 2016 10:53:33</td>
<td>29 Apr 2016 17:17:35</td>
<td>0:00:42</td>
<td>192.168.14.0.1</td>
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5.7. Configuration

This menu helps in the configuration of trunks and devices. Multiple trunks can be added and existing trunk details can be viewed. Device configuration settings can also be viewed using this menu. Multiple wave path can be added and existing wave path details can be viewed.

5.7.1. Wave Path

This submenu shows the list of existing wave paths. These shows the details like Path ID and Path. There is also an option to add new wave path by clicking *Add New Path* as shown in the below screen.

New Wave Path: To add new wave path, mention the address and click *Add Path*.

5.7.2. Device

This submenu gives the information about the device configuration. Click *Ok* to configure the devices. The link *SHOW DEVICE SETTINGS* will display all the information about the devices and trunks.
The below screen shows the device configuration settings. The information includes device name, trunk name, trunk type and protocol.

The below screen shows the report which confirms that the device has been successfully configured.

The below screen shows the device settings. The information shown includes device name, trunk name, channels allocated and status.

5.7.3. Trunks

This submenu gives the details about the existing trunks. Select the trunk from the list and then click Ok.
Trunk Details page appears as shown below. The information obtained includes trunk name and trunk type.

![Trunk Details](image)

**Adding New Trunk**
Specify the details like Trunk Name and Trunk Type. Click *Add*. To reset, click the option *Reset*.

![New Trunk](image)

**Trunk List**
List of trunk details is shown below. The information includes trunk name, trunk type and status (dialout mode). The total count of trunks can be also seen.

![Trunk List](image)

**5.7.4. General Settings**
Allows to set the Server IP Address and Port Number through which the OBD system is accessible. Settings cannot be updated while OBD engine is running.

![General Settings](image)
5.8. Manage Device

Start and shutdown the Dialer Engine from the browser interface by clicking the menu Manage Device. There are two submenus - Start and Shutdown.

5.8.1 Start

Click Start and then Yes to start the Outbound Dialer. A prompt appears asking for confirmation of starting the Outbound Dialer, click OK to confirm.

5.8.2 Shutdown

This submenu allows to shutdown the Xtend Outbound Dialer. Click Shutdown and then Yes, a prompt appears asking confirmation to Shutdown the dialer engine, click OK to confirm.
6. Contact Us

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