exotel
DOCS

Engage

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1. Engage (ExoCampaigns)

1.1. Overview

The **Campaigns** dashboard is a unified workspace in Exotel that allows you to plan, execute, and track all outbound communication campaigns from a single interface.
It supports multiple campaign types – **Call**, **SMS**, **WhatsApp**, **RCS**, and **Auto-Dialer** – along with integrated tools such as **Lists and Contacts** and **Campaign Throttling** controls.

Campaigns are accessible from the **Tools** → **Campaigns** menu in the Exotel dashboard.
Each campaign type offers specialized features and reporting, while maintaining a consistent workflow pattern:

1. Configure campaign basics and target audience
2. Select message or call template and personalization options
3. Schedule and launch
4. Monitor progress via real-time statistics and reports

1.2. Call Campaign

The **Call Campaigns** feature enables campaign managers to run large-scale **Call Campaigns** for up to **5 lakh contacts**. It includes capabilities such as dynamic greetings and IVR creation, retry policies, campaign-level reports and inbox, contact lists, throttling controls, and the ability to mark an ongoing campaign as completed. Call Campaigns currently supports call campaigns; Auto-Dialer and SMS campaigns will be supported soon.

Key benefits

1. **Dynamic greeting & IVR** – Create dynamic greetings and simple IVRs directly from the create-campaign page.
2. **Retry functionality** – Support for up to three retries per number, in linear or exponential mode.
3. **Campaign-level reports** – Download campaign reports after completion.
4. **Mark as completed** – Pause then mark a campaign completed to stop further dialing; reports remain available.
5. **Lists & contacts** – Built-in address book (Lists & Contacts). Each list can contain up to **1 lakh** contacts; up to **5 lists** can be selected in a campaign.
6. **Campaign & call details** – Dedicated views for campaign summary, real-time stats, and call-level inbox.
7. **Dashboard ↔ API parity** – Campaigns, contacts, and lists created via API are available in the dashboard and vice-versa.

Accessing Call Campaigns

1. From the dashboard left-hand panel, go to **Tools** → **Campaigns -> Call (tab)**

Create a Call Campaign

Click **Create Call Campaign** on the Call Campaigns home page. The create flow collects campaign-level settings and content.

Required inputs:

- Campaign name (min 3 characters)
- Call type – **Static** or **Dynamic**
- Content selection – Text, Flow, or IVR
- Start and end date/time
- Caller ID (Exophone)
- Retry settings (count, interval, mechanism, retry-on statuses)
- Call type (transactional by default)
- Duplicate-number behavior
- Optional: Per-campaign throttle (Auto or Custom CPM)

Call type and audience lists

- **Static**: Use when the same content plays to all contacts. Select up to **5 saved lists**.

- **Dynamic**: Use when content varies per contact. Upload **one CSV** (up to **5 lakh** contacts, max **70 MB**) with up to **10 variables**. The first column must be `number` (phone numbers). Indian numbers: country code optional; international numbers: country code mandatory.

> CSV variable mapping: Place `@@` in the content textbox to list available CSV column headers for mapping. This works for dynamic text content and dynamic IVR prompts.

Content options

1. **Type text** – Enter the message text to be played. Static content is fixed; dynamic content can include variables mapped from the CSV.
2. **Select a Flow** – Choose a pre-built flow from the App Bazaar that contains the call content.
3. **Create an IVR** – Build a simple IVR inline. Configure menu prompts, number of repeats for no-input situations (default: repeat after 5 seconds), and the DTMF mapping.

Caller ID

Select the **Exophone** number that will appear on recipient phones as the caller ID.

Scheduling

- **Start Date & Time:** Must be at least the minimum lead time (default trigger delay up to 2 minutes). Cannot be earlier than the current time.
- **End Date & Time:** Optional; defaults to 30 days after the start. Minimum end time is 2 minutes after start.

Retry settings

- **Number of retries:** 0–3 (default 0).
- **Retry interval (mins):** Required when retries > 0.
- **Retry mechanism:** `Linear` (equal spacing) or `Exponential` (doubling intervals). Example with 15 min base:
  - Linear: 15, 15, 15
  - Exponential: 15, 30, 60
- **Retry-on statuses:** Define which call outcomes count as unsuccessful (e.g., `busy`, `no-answer`, `failed`).

> Default call type is **Transactional** for call campaigns. Use the duplicate-number toggle to allow or prevent calling the same number multiple times across lists.

Campaign throttling (per-account and per-campaign)

Call Campaigns includes both a **Campaign level throttle** (account-wide) and **Per campaign throttle** (customizable per campaign).

Campaign level throttle

- Visible in **Tools** → **Campaigns** → **Settings**.
- Default: **60 CPM** (calls per minute).
- Can be increased up to **200 CPM** via the settings page. To request a value beyond 200 CPM, contact your Account Manager.

Per-campaign throttle

- Configure while creating a campaign. Two modes are available:
  - **Auto** (default): The account-level CPM is evenly divided among active campaigns.
    - Example: 100 CPM and 4 active campaigns in Auto → ~25 CPM each.
  - **Custom**: Assign a specific CPM value to the campaign within the allowed range.
- Important: The sum of active campaigns' CPM must remain below the account Campaign level throttle.

> Choose Custom CPM carefully. If you allocate all available CPM to running campaigns, you may be unable to schedule additional campaigns until CPM frees up.

You can view a campaign's CPM and mode under the campaign details tab.

Finalise campaign creation

Click **Create Call Campaign** to save and schedule the campaign. A confirmation banner appears and the campaign displays in the campaigns list.

Campaign list & actions

The Call Campaigns landing page lists all call campaigns with columns such as Campaign Name, Campaign Type, Schedule Time, Status, and Performance.

Action menu available per campaign (state-dependent):

- **Pause** – Stop further dialing (applicable to scheduled and in-progress campaigns).
- **Resume** – Resume dialing remaining numbers (paused campaigns only).
- **Complete** – Mark paused campaign as completed; remaining numbers become `Failed_NoAttempt`.
- **Archive** – Move completed or scheduled campaigns into archive (read-only).
- **Download** – Download completed campaign reports (available 2 hours after completion).

Tools: Filter by status, search by campaign name (min 3 characters), and sort by campaign name or schedule time.

Performance overview

Campaign performance shows three high-level statuses: **Completed**, **Failed**, and **Scheduled**. Hover interactions break these down further:

- **Failed** → failed, failed DND, failed balance, invalid
- **Scheduled** → scheduled, in-progress, retry, retrying

Campaign summary & stats

Click an individual campaign to open the summary/stats page. The page is split into two sections: campaign-level metadata and number-level call details.

Campaign Details

Provides an overview of all campaign-level settings and identifiers:

- Contact lists used
- Configured call flow or IVR
- Start time and end time
- Caller ID
- Call type and duplicate-number setting
- Number of retries, retry interval, and retry mechanism
- Per-campaign CPM and mode

Campaign Stats

Real-time number-level statistics (refresh icon updates data; up to 5-minute delay).

Possible states:

- **Scheduled** – Queued for dialing
- **In progress** – Currently calling/connected and executing call flow
- **Retry** – Added for retry after an unsuccessful attempt
- **Retrying** – Equivalent to In progress while retry attempt runs
- **Failed** – Invalid or unreachable numbers
- **Failed DND** – Number blocked due to NDNC registry
- **Failed Balance** – Not dialed due to low account balance
- **Failed No-Attempt** – Not dialed because campaign completed or timeout (30-day max)
- **Completed** – Successfully connected and executed call flow
- **Invalid** – Unknown or malformed number states

View campaign call details

This view lists every call made as part of a campaign. Each row includes:

- Contact name (if present in Contacts)
- Date created
- Call status and detailed status
- Call duration
- DTMF selection (if any)
- Call recording (link)

Action menu includes call start/end times, direction, and call SID.

- **Search** by number (min 3 characters)

- **Filter** by call status
- **Sort** by created date

Call statuses include: **Completed**, **Failed**, **No answer**, **Busy**.

Notes for implementation and troubleshooting

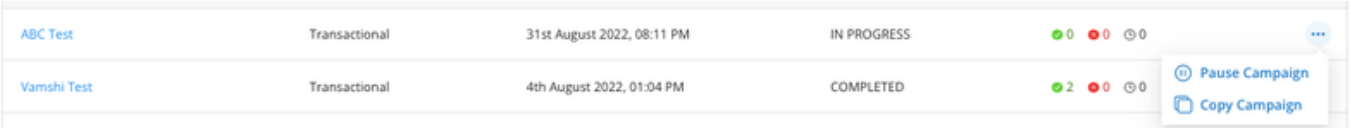
- Campaign reports become available for download **2 hours after** the campaign completes.
- Default account-level throttling is designed to balance reliability and operator limits; adjust cautiously and coordinate with your Account Manager for large increases.
- For large lists, validate CSV formatting and run a **test campaign** on a small subset before full launch.

Is it possible to pause a campaign?

Unfortunately, Not possible right now without human intervention!

However, if there are any scheduled calls in the campaign you will be able to pause the campaign only for the scheduled ones.

For example, if you have run the campaign to 100 numbers and 70 are still in a scheduled state, you will have an option to pause the campaign as shown below.



However, if the count of the scheduled numbers is 0, you will not be able to pause the campaign.

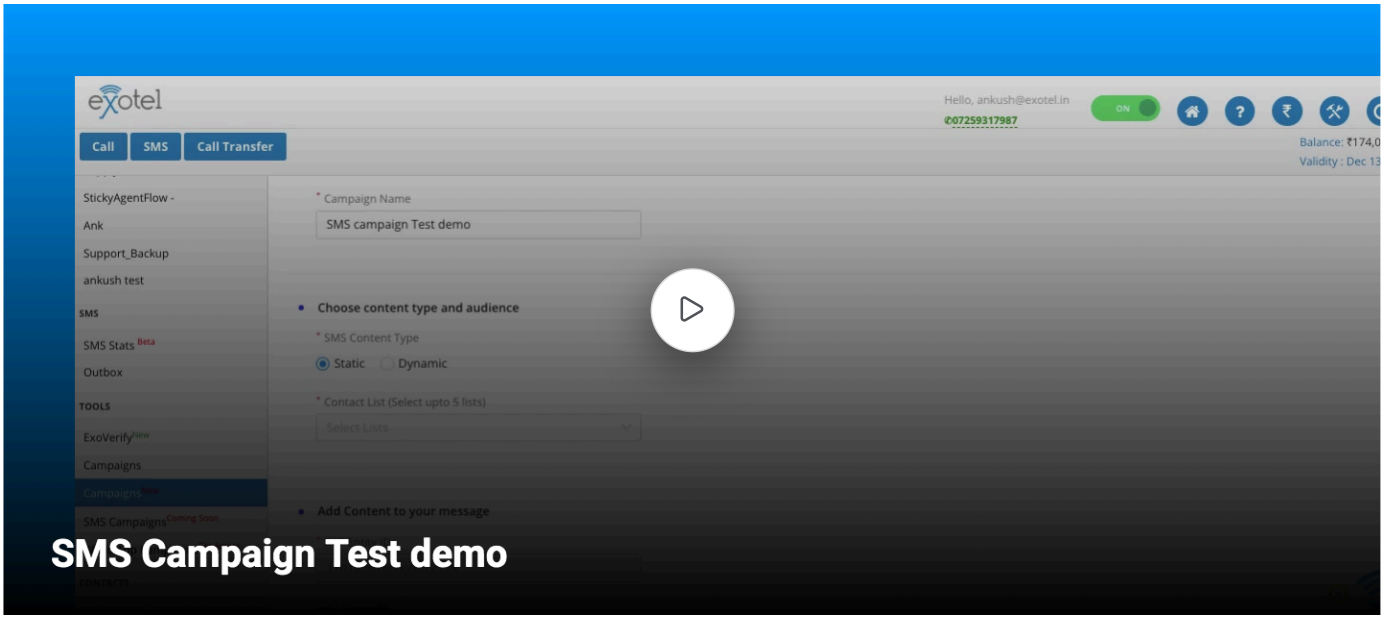
In case you would want to stop the campaign if it is very necessary, we would recommend that you delete the campaign. Please note that once you delete the campaign, the details of that campaign will not be available on the dashboard.

Watch a short video

Broadcasting a voice message to many people

Pausing a campaign

1.3. SMS Campaign



The **SMS Campaign** feature enables campaign managers to run large-scale SMS campaigns for up to **5 lakh contacts**. It includes capabilities such as static and dynamic messaging, campaign-level reports, inbox view, real-time performance stats, and the option to mark an ongoing campaign as completed.

Key Benefits

- **Static and Dynamic Campaigns:** Choose between **static SMS** (same message for all recipients) or **dynamic SMS** (personalized content for each recipient).
- **Campaign-Level Reports:** Download campaign-level reports once the campaign is complete to analyze performance and delivery trends.
- **Mark as Completed:** Pause any ongoing campaign and mark it as completed. Remaining numbers will not receive messages, and reports will still be available for such campaigns.
- **Campaign & SMS Details:** Each campaign provides a dedicated dashboard with:
  - Campaign summary
  - Real-time statistics
  - SMS-level details (outbox view)
- **Send Test SMS:**Test campaigns before launch by sending a sample SMS to verify content and variables.
- **Estimated Cost:** Calculate campaign costs in advance based on SMS content, number of recipients, and billing plan.

Navigating the SMS Campaign Dashboard

1. From the left-hand panel, click **Tools** → **Campaigns (New)**.
2. On the Campaigns page, select **SMS Campaign** (next to the **Call Campaign** button).

Create an SMS Campaign

Click **Create SMS Campaign** on the Campaigns home page to open the campaign creation screen.

You will be prompted to enter the following campaign details.

Step 1: Campaign Details

- **Campaign Name** – Minimum of three characters.
- **SMS Content Type** – Choose between:
  - **Static:** Same content for all recipients.
  - **Dynamic:** Personalized messages using variables.

For **static campaigns**, select one or more existing contact lists (up to five per campaign).
For **dynamic campaigns**, upload a new CSV list (up to 10 lakh contacts, max 60 MB, with up to 5 variables).

> The first column of the CSV file must contain phone numbers.
> For Indian numbers, the country code is optional.
> All other columns are optional and can be customized as needed.

Step 2: DLT Configuration

- **DLT Entity ID** – Registered on the DLT (Distributed Ledger Technology) portal; required for all Indian destinations. (Read-only field)
- **DLT Template ID** – ID associated with your approved DLT content template.
- **DLT Sender ID** – Select the appropriate sender ID:
  - **Text sender ID** for transactional and transactional opt-in messages.
  - **Numeric sender ID** for promotional SMS.

Step 3: Select a Template

You can choose between:

1. **Selecting a saved template** from your approved list, or
2. **Entering details manually** using a DLT-approved template ID and content.

Selecting a Saved Template

- A popup displays all approved templates in your account.
- Search by **Template ID** or **Message Body**.
- Once selected, DLT Template ID and SMS Type fields populate automatically.
- To update a missing DLT Template ID, click the provided link to open the **SMS Settings** page.

Enter Manually

If you choose to enter details manually, fill out all DLT parameters carefully.

> Ensure the template content exactly matches the DLT-approved version.
> If unsure, send a **test SMS** before launching the campaign to confirm template validity.

Step 4: SMS Content and Variables

- **SMS Content:** For static messages, content is fixed and uneditable.
- For dynamic messages, you can map variables using the `@@` notation – typing `@@` displays all available column headers from your uploaded CSV file.
- Replace variables accurately to ensure correct personalization.

Step 5: Schedule the Campaign

Specify when your campaign should run.

- **Start Date and Time:** Must be at least 15 minutes ahead of the current time.
- **End Date and Time:** Optional; defaults to 30 days from the start time. Minimum end time is 2 hours after the start time.

You can optionally add a **Campaign Status Callback URL** to receive updates.

Callback Parameters:

- `campaign_sid` – Unique campaign identifier
- `date_created`, `date_updated`, `date_started`
- `status` – in-progress | completed
- `reports` – report download link (available only after completion)

Step 6: Send a Test SMS

Before creating the campaign, use the **Send Test SMS** option.

The popup will display:

- DLT Entity ID
- DLT Template ID
- DLT Sender ID
- SMS Type
- SMS Content

You will then enter:

- **Phone Number** – Destination number (E.164 format preferred).
- **Custom Field (Optional):** Variable replacements for test message preview.

> It's recommended to send a test SMS whenever a new template is selected or edited.
> This ensures the DLT ID and message format are correct.

Step 7: Create SMS Campaign

Click **Create SMS Campaign** once all details are filled in.
A confirmation banner will appear, and the campaign will now be visible in the SMS Campaigns list.

View List of SMS Campaigns

The SMS Campaigns landing page shows a summary of all existing campaigns, including:

- Campaign Name
- Campaign Type
- Schedule Time
- Status
- Performance

Each campaign has an **action menu** with the following options:

Action	Description
Pause	Stop sending SMS for an in-progress or scheduled campaign.
Resume	Continue sending SMS to pending numbers (paused campaigns only).
Complete	Mark campaign as completed. Remaining numbers are marked as `failed_expired`.
Archive	Move completed or scheduled campaigns to archive view.
Download	Download reports for completed campaigns.

Filters, Search, and Sorting

- **Filter** by campaign status.
- **Search** by campaign name (minimum 3 characters).
- **Sort** by campaign name or schedule time.

Performance Overview

Displays campaign performance across three key statuses:

- **Completed**
- **Failed**
- **Scheduled**

Hovering over the counts shows detailed subcategories:

- **Failed:** Failed SMS, Failed Expired, Failed DND, Failed No Attempt, Failed No Balance, Invalid SMS

- **Scheduled:** Submitted SMS and Scheduled SMS

SMS Campaign Summary and Stats

Click any campaign to view its detailed statistics.
The page is divided into two sections: **Campaign Details** and **Campaign Stats**.

Campaign Details

Provides an overview of all campaign-level settings and identifiers:

- Lists used
- Entity ID and Sender ID
- Template ID and SMS Type
- Start and expiry time
- Message content summary
- Estimated campaign cost

Estimated Cost

Displays the projected cost based on:

- Number of recipients
- SMS character count
- Billing plan

> For dynamic SMS, costs are estimated assuming all numbers are domestic Indian contacts.
> The final charge may vary slightly once the campaign completes.
> This feature is disabled once the campaign starts.

Campaign Stats

Shows real-time number-level delivery data.
Click the **refresh icon** to update (up to 5 minutes delay).

Status	Meaning
Scheduled	Numbers pending for SMS dispatch.
Submitted	SMS submitted to the gateway.
Sent	SMS successfully delivered to handset.
Failed	Invalid or unreachable numbers.
Failed DND	Number blocked by NDNC registry.
Failed Expiry	Message expired after repeated retries by operator.
Failed No Attempt	Campaign ended before completion or exceeded 30-day limit.
Failed No Balance	Campaign halted due to insufficient account balance.
Invalid	Invalid or malformed phone number.

View SMS Details

This section lists all SMS messages sent as part of the campaign.
It includes:

- Number and Name (if saved)
- Time and Status
- Detailed Status

The **action menu** displays:

- Sent Time
- Sender ID
- Destination Number
- SMS Reference ID

Search by number (minimum 3 characters).
Sort results by created date.

URL Shortening

URLs in SMS messages can be long and consume valuable character space.
Shortening URLs helps stay within the 160-character limit and improves click-through rates.
Short URLs are also trackable, allowing you to monitor engagement.

Enable URL Shortening and Click Tracking

Within the **Create SMS Campaign** screen, locate the **URL Shortening and Tracking** section.

- **Require URL Shortening:** Select **Yes** to automatically shorten URLs in the SMS body (e.g. `https://exo.tl/vhdpzv`).
  Each SMS receives a unique short code. Multiple URLs will each be shortened. Default expiry is 30 days.

- **Enable Click Tracking:** Select **Yes** to track click data for each recipient.
  This captures total clicks and unique clicks.
- **Click Tracking Callback URL:** Provide a webhook URL to receive click data per number.

> URL shortening must be enabled for click tracking to function.
> Click tracking data is not currently included in campaign callbacks.

Contact List Limits

There is **no restriction** on the number of contacts for which an SMS campaign can be created.
However, the **uploaded CSV file must be under 10 MB** in size.

Watch a short video

Scheduling a bulk SMS campaign

1.3.1. SMS Click Tracking (CTA)

Click tracking (also called CTA tracking) lets you measure how many recipients clicked a link in your SMS campaign. When enabled, Engage automatically shortens the link in your message, delivers a unique short link to each recipient, and records whether and when each recipient clicked it. You can see this data on the campaign summary page as a click-through rate (CTR) funnel, in the per-recipient Message Details table, and in a downloadable CSV report.

Click tracking is available for SMS campaigns created in Engage.

Prerequisites

The CTR funnel, CTA Clicked / CTA Clicked Timestamp columns, and CTA CSV export are available only in the new Exotel Engage campaign experience. Older SMS campaign flows offer similar URL shortening and click tracking options but do not provide this reporting. If these features are missing after enabling click tracking, contact your **support team** to confirm access to the new Engage experience.

How to enable click tracking on an SMS campaign

Click tracking is configured while creating your SMS campaign, in the "Shorten the URLs of your message" section.

1. Open Create SMS Campaign and scroll to the "Shorten the URLs of your message" section.
2. **Require URL Shortening** – choose Yes to shorten any link in your message body. This is required if you want to track clicks.
3. **Enable Click Tracking –** choose Yes to track clicks on the shortened link. Turning this on automatically switches Require URL Shortening to Yes as well (you will see a note: "URL shortening is automatically enabled when Click Tracking is active.").
4. **Shorten URL Header –** enter a short, alphanumeric label (up to 16 characters) that will be used as part of your shortened link. This field is required whenever URL shortening is on.
5. **Click Tracking Callback URL (optional) –** if you want click events pushed to your own system, enter an HTTPS webhook URL here. This field only appears when click tracking is on, and it is not required.
6. Continue through the rest of the campaign setup and send or schedule your campaign as usual.

What your recipients see

When URL shortening is on, the long link in your message is replaced with a short Exotel link, about 21 characters long (for example, https://exo.tl/vhdpzv). Each recipient gets a unique short link, so clicks can be tied back to that specific recipient.

Viewing click tracking results

Once your campaign has started sending, open the campaign's Summary page to review click tracking results.

- **Campaign Details panel –** shows whether "URL Shortening" and "Click Tracking" are Enabled or Disabled for this campaign.

- **Click-through rate (CTR) funnel –** shown when click tracking is enabled. It displays a funnel from Scheduled to Delivered to CTA Clicked, so you can see engagement drop-off at a glance.
- **Message Details table –** includes two additional columns when click tracking is enabled: CTA Clicked (Yes / No / N/A) and CTA Clicked Timestamp. You can filter the table by CTA Clicked status and by click timestamp range.
- **Download CTA report (CSV) –** use this button on the summary page to export the full per-recipient click tracking data as a CSV file.

Remember to use the Refresh action on the summary page to pull the latest click data – the page does not refresh automatically.

Understanding the data

- **CTA Clicked = Yes:** the recipient's message was delivered, and they clicked the link.
- **CTA Clicked = No:** the message was delivered, but no click has been recorded yet (or ever).
- **CTA Clicked = N/A:** the message was not successfully delivered, so click tracking does not apply. For SMS, this includes messages that were sent but never confirmed delivered, failed, rejected, or expired.
- CTA Clicked Timestamp records only the first click from a recipient. If a recipient clicks the link more than once, the status and timestamp will not change after the first click.
- Click-through rate (CTR) is calculated as: unique clicks on delivered messages divided by total delivered messages, times 100. It is based on delivered messages, not on your total uploaded contact count.
- New clicks typically appear within about 5 minutes of the recipient clicking the link. Use Refresh on the summary page to see the latest numbers; the "last updated" time reflects your last refresh, not the last click.
- Click timestamps are shown in your campaign's report timezone, formatted as DD/MM/YYYY hh:mm:ss AM/PM.

Optional webhook callback

If you provide a Click Tracking Callback URL when creating your campaign, Engage will notify that URL when a click is recorded, so you can capture click events in your own systems in near real time. Providing a callback URL is optional – click tracking results are always available on the Message Details table and CSV export whether or not you set one up.

Availability & known issues

- Click tracking is currently supported for SMS campaigns.
- Click tracking is not currently available for WhatsApp or RCS campaigns.

FAQ / Troubleshooting

Q: I enabled click tracking, but I do not see the CTA columns on Message Details.

A: Make sure "Enable Click Tracking" was set to Yes at the time the campaign was created – it cannot be turned on retroactively for an already-created campaign. Also make sure you have refreshed the summary page.

Q: My CTR is 0% even though I know some recipients clicked.

A: Click data can take a short while to appear (typically within 5 minutes), and the summary page does not auto-refresh – use the Refresh action.

Q: A recipient told me they clicked the link, but their row still shows No.

A: Confirm their message shows as Delivered (not just Sent) – clicks are only tracked against successfully delivered messages. If it is delivered and still showing No after a few minutes and a refresh, contact support.

Q: Why does my message show N/A instead of No?

A: N/A means the message itself was not successfully delivered (for example, failed, rejected, expired, or not yet confirmed delivered), so there is nothing to track a click against.

Q: Can I track more than one link in my message?

A: No – only the first http:// or https:// link in your message body is shortened and tracked, even if your message contains multiple links.

Need help?

If you have any questions or run into issues with click tracking, please reach out to us using the chat widget on your Exotel dashboard or WhatsApp us at 08088919888.

1.4. RCS Campaign

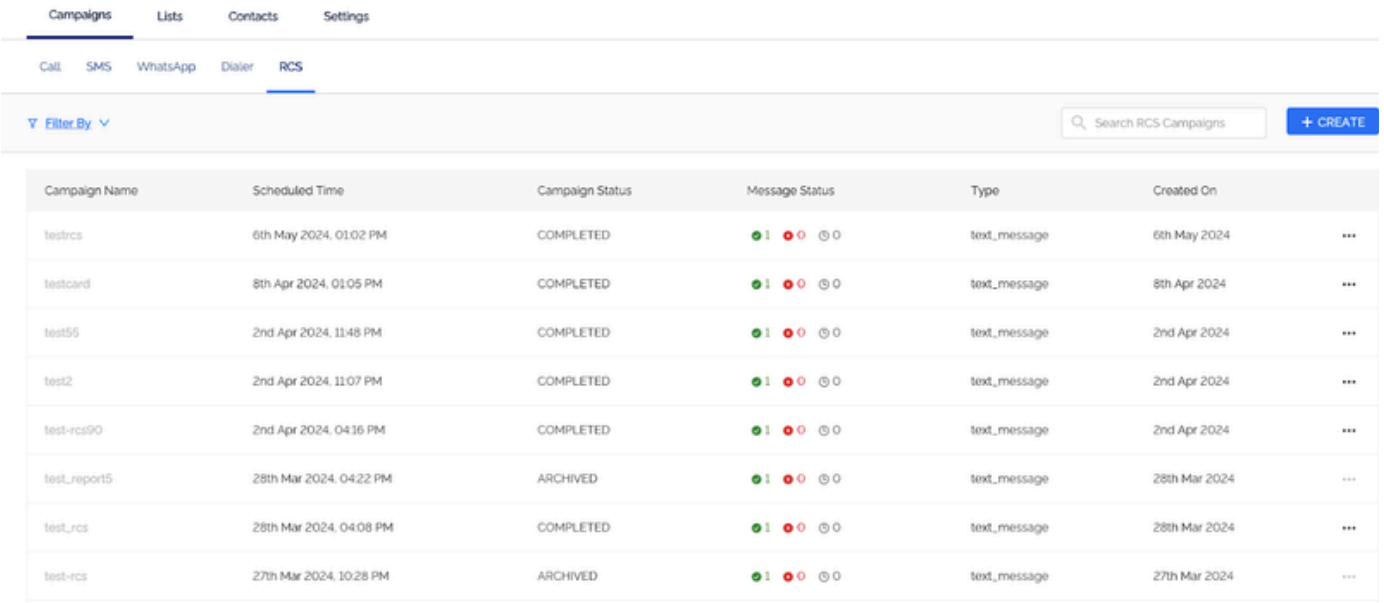
The **RCS Campaign** feature enables campaign managers to run interactive RCS campaigns with **Rich Cards**, **Images**, **Videos**, **GIFs**, **Carousels**, and more. Use the campaigns dashboard to reach your audience and track performance in real time.

Key Benefits

- **Dynamic List:** Upload your audience list with as few as one column (phone number) to start your campaign.
  If your RCS templates contain variables, add corresponding columns in your list to map them easily during setup.
- **Campaign Execution Control:** Archive campaigns you no longer wish to run, pause ongoing campaigns, or resume them later from where they stopped.
- **Live Dashboard & Message Details:** Each campaign includes a dedicated dashboard showing:
  - Campaign summary
  - Real-time statistics
  - Outbox-level message details
- **Campaign Summary:** Receive a full campaign summary upon completion, including message-level delivery reports and engagement metrics.

Accessing RCS Campaigns

1. Log in to your **Exotel Dashboard**.
2. From the left-hand panel, click **Tools** → **Campaigns**.
3. On the Campaigns page, select **RCS Campaign** (next to **Dialer Campaign**).



RCS campaign

Prerequisites

Please contact your **Account Manager** to complete the RCS setup.

1. **RCS Portal Registration** – Your RCS bot must be registered and launched on our partner RCS portal.
2. **Template Registration** – Ensure your templates are approved on the partner portal.
3. **Dashboard Enablement** – RCS is an on-demand feature; request your Account Manager to enable it on your dashboard.

Create an RCS Campaign

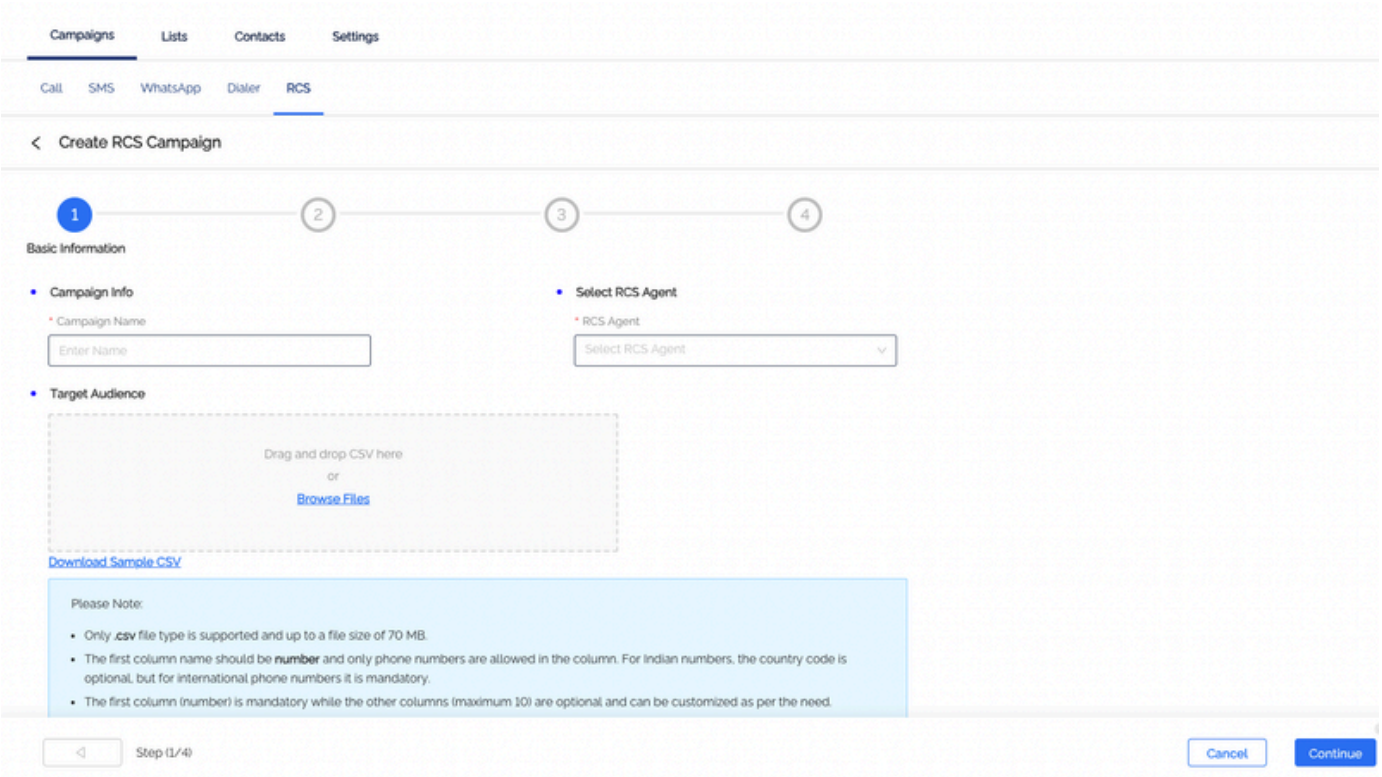
Go to **Home** → **Campaigns** → **RCS** and click **CREATE** to begin.

Your campaign can be created in **four simple steps**.

Step 1: Basic Information

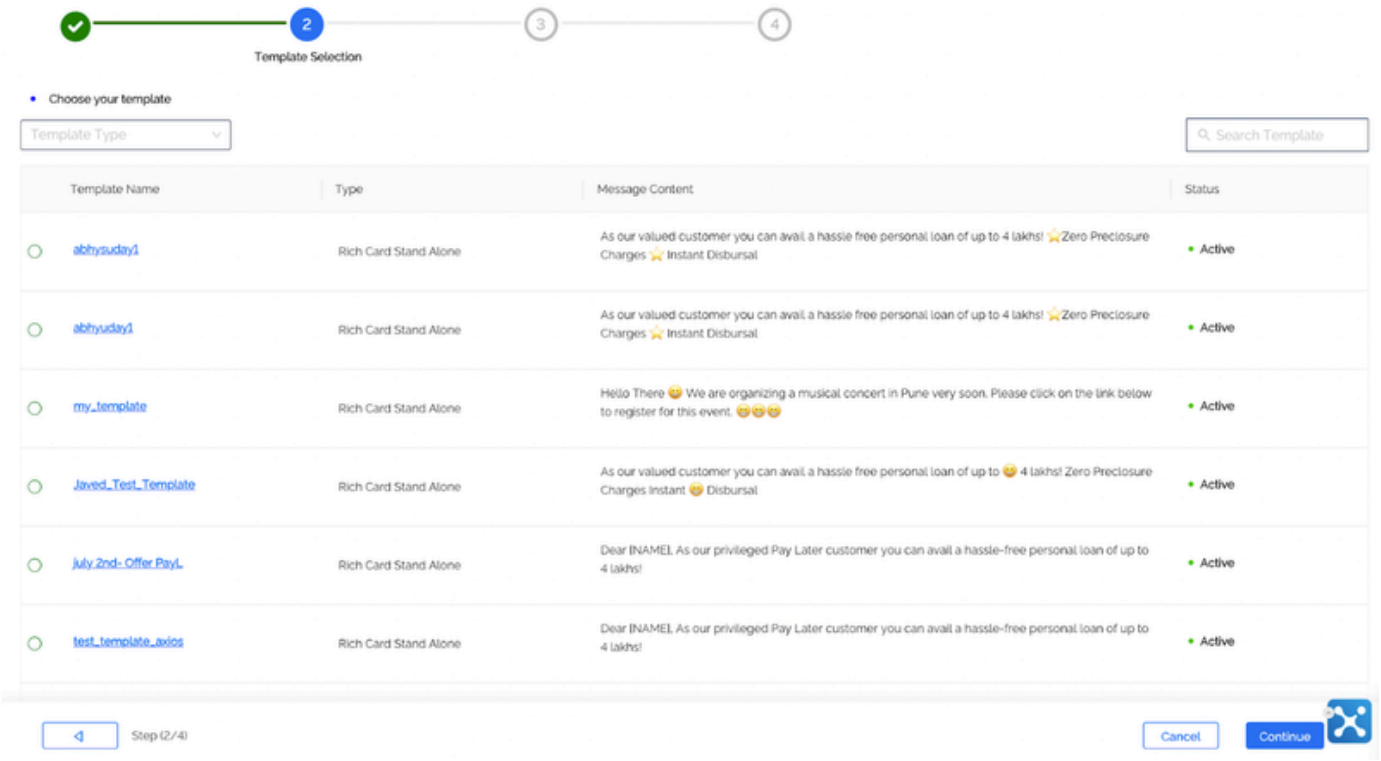
1. **Campaign Name** – Enter a name for your campaign.
2. **Select RCS Agent** – Choose your RCS Agent (available once your bot is created on the partner portal).
3. **Target Audience** – Upload your target audience list as a `.csv` file.
4. Click **Continue** to move to the next step.

> **CSV Guidelines:**
>
> - Only `.csv` files up to **70 MB** are supported.
> - The first column must be **number** (phone numbers only).
> - Country code for Indian numbers is optional.
> - Add up to **5 additional columns** for variables.



Step 2: Template Selection

1. Choose the **template** you want to use.
2. Search by **category** (Text, Rich Card, Carousel, etc.) or **template name**.
3. Ensure you select only **Active** templates.
4. Click **Continue**.

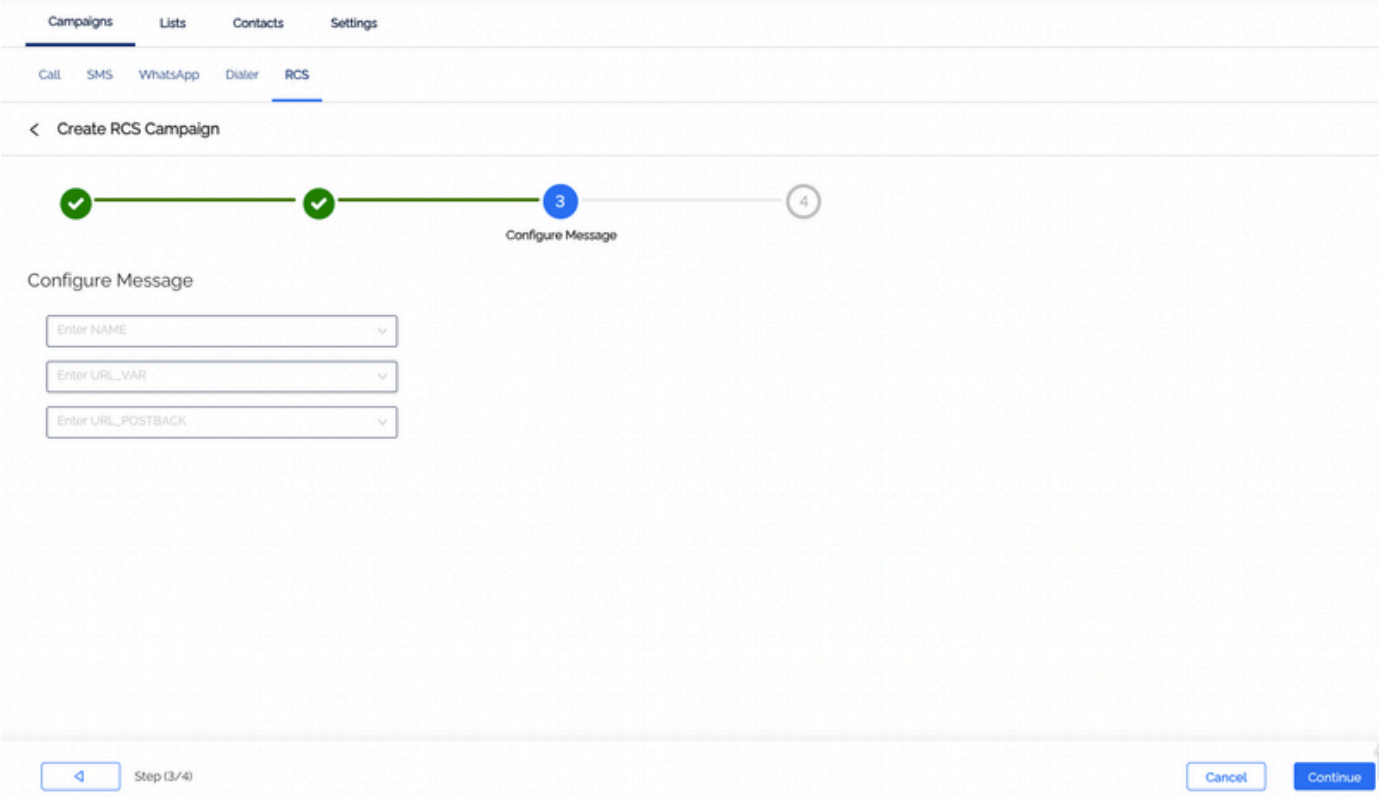


Step 3: Configure Message

If your template has no variables, click **Continue** to skip configuration.

If variables are present:

1. Open the dropdown beside each variable name.
2. Map it to the correct column in your uploaded audience list.
3. If no match exists, enter a static value manually.
4. Choose a **Fallback option** – either **SMS** or **WhatsApp**.



Step 3.1: SMS Fallback (Optional)

If you select **SMS** as fallback, an extra step appears. Fill in the following:

- Entity ID
- Binding Chain Details
- SMS Template (select from saved templates or add manually)
- Shorten URL Header
- Enable URL Tracking

Step 3.2: WhatsApp Fallback (Optional)

If you select **WhatsApp** as fallback, two extra steps appear.

1. Fill in
    1. WABA ID
    2. WABA Number
    3. Template Selection
2. Configure variables for the selected WhatsApp template.

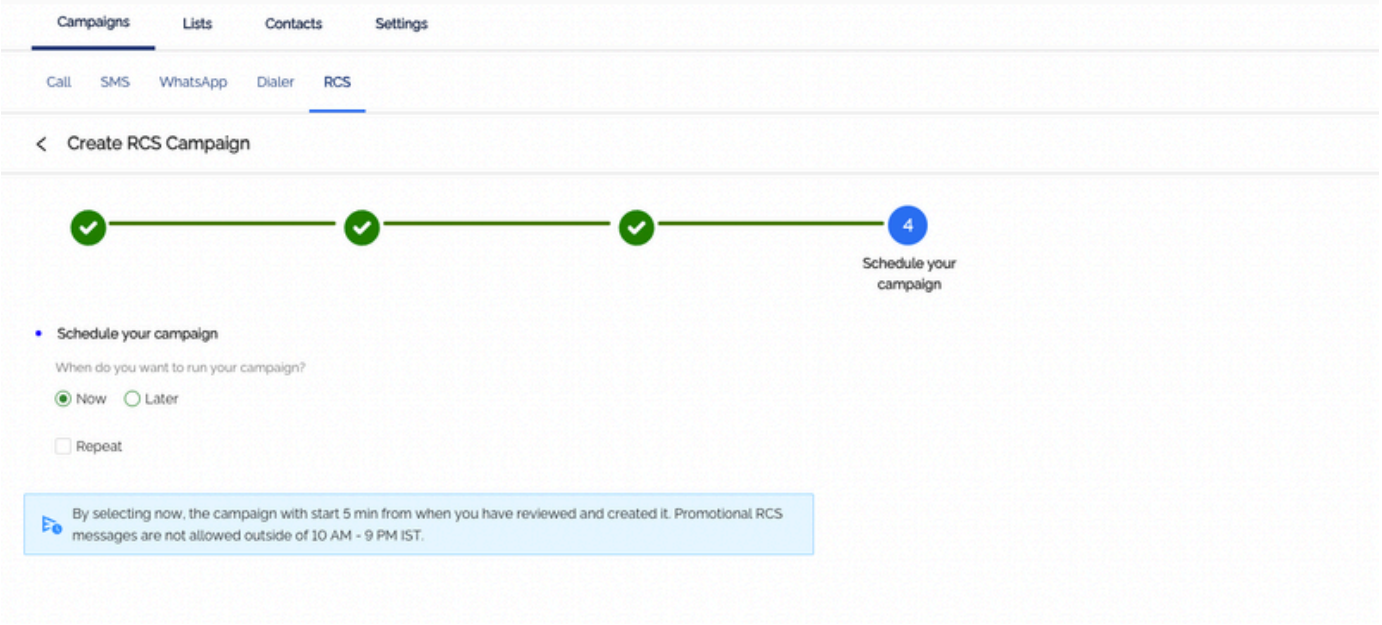
For more information, see the **WhatsApp Campaign** .

Step 4: Schedule Your Campaign

1. Choose when to run your campaign:
    - **Now** – Starts within 10 minutes of creation.

- **Later** – Specify a start time.
- **Repeat** – Set a frequency and end date for recurring campaigns.

2. Click **Create Campaign** to schedule it.



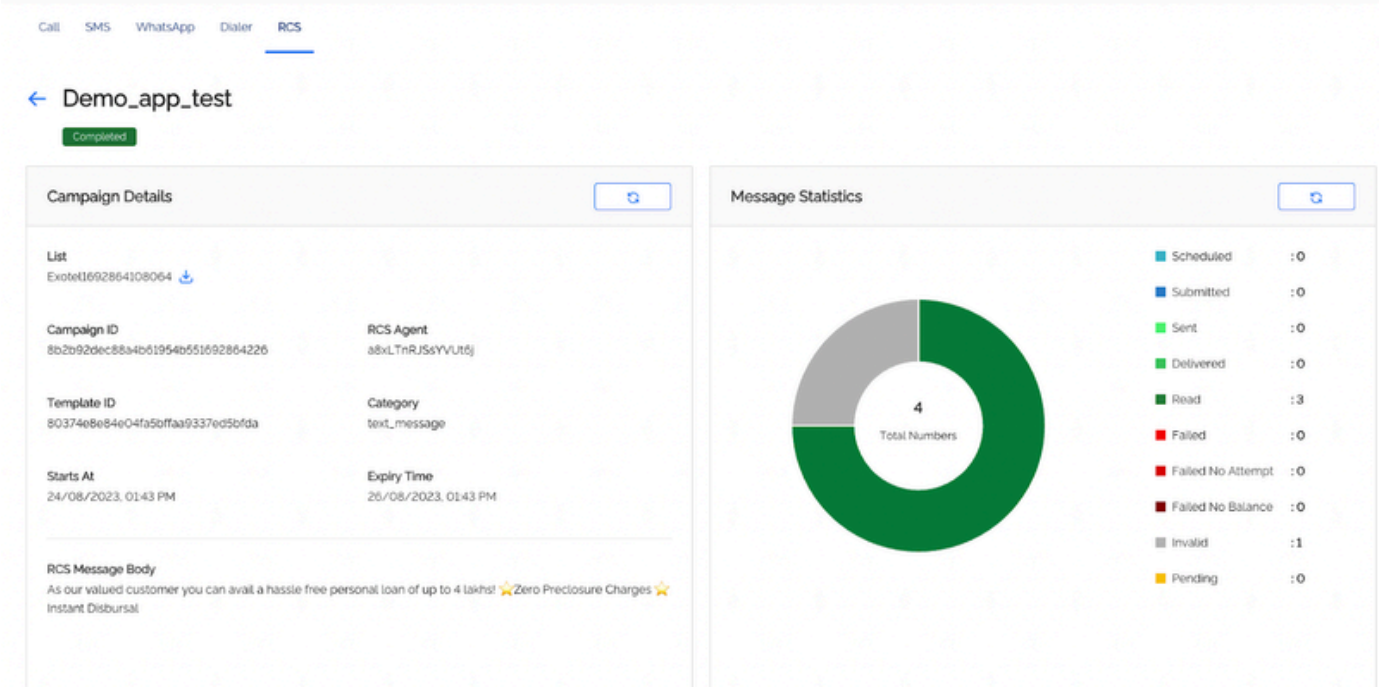
Campaign States

After creation, all campaigns appear in the **RCS Campaigns** page.

State	Description
Scheduled	Created but not started yet. Can be archived (not restartable).
In-progress	Actively running. You can pause it.
Paused	Temporarily stopped. You can resume, force-complete, or archive it.
Completed	Campaign successfully completed.
Archived	Read-only mode. View details but cannot edit.

Campaign Details and Statistics

When a campaign is created, you will be able to view detailed stats and analytics for the campaign in the **RCS campaigns** page. Click a campaign name to open its detail view.



Campaign Details

A comprehensive summary of the campaign with campaign details including:

- Lists
- RCS Agent
- Template ID and Category
- Start and End Time
- Message Content

Campaign Stats

Displays number-level metrics. You can click the **refresh icon** to update the data (delay of up to 5 minutes).

Status	Meaning
Scheduled	Numbers queued to send.
Submitted	Messages submitted from Exotel to RCS.
Sent	Messages sent via RCS.
Delivered	Message delivered to user.
Read	Message read by user.
Failed	Delivery failed.
Failed – No Attempt	Campaign stopped or timed out before list completion.
Failed – No Balance	Insufficient balance.
Invalid	Invalid phone numbers

View Message Details

This section lists all messages sent as part of your RCS campaign with details:

- Number
- Name (if saved in address book)
- Detailed Status
- Sent and Delivered Times
- Message SID and Read Time (via action menu)

1.5. WhatsApp Campaign

The **WhatsApp Campaign** feature enables campaign managers to run WhatsApp campaigns for up to **5 lakh contacts**, with support for **personalized messages**, **rich media**, **campaign-level reports**, **inbox view**, **scheduling**, and more.

Key Benefits

1. **Self-Service Dashboard:** Sign up through the self-serve dashboard, create and manage templates, and launch campaigns within minutes.
2. **Campaign Scheduling:** Schedule campaigns to run immediately or at a future date and time.
3. **Campaign-Level Reports:** Download campaign reports after completion to review performance.
4. **Live Dashboard & Message Details:** Each campaign includes a standalone view showing:
    1. Campaign summary
    2. Real-time message statistics
    3. Message-level details (outbox view)

Accessing the WhatsApp Campaigns Dashboard

1. From the left-hand panel, click **Tools** → **Campaigns**.
2. In the Campaigns view, select **WhatsApp Campaign** (next to **SMS Campaign**).

Prerequisites

1. **Sign Up** – Register your WhatsApp number using Exotel's WhatsApp Cloud API.
2. **Verify Business Manager** – Verify your Facebook Business Manager account to enable unlimited messaging.
3. **Create Template** – Create and approve message templates from the self-serve WhatsApp dashboard.

Create a WhatsApp Campaign

Go to **Tools** → **Campaigns** → **WhatsApp Campaigns**, then click **Create WhatsApp Campaign**.

The campaign creation process has **four steps**.

Step 1: Campaign Details

Enter the following details:

- **Campaign Name** – Provide a unique campaign name.
- **WABA ID** – Select your WABA ID from the dropdown (auto-generated after signup).
- **WhatsApp Business Number** – Choose the sender number linked to the selected WABA ID.

- **Audience File** – Upload your CSV audience file.

Choose Content Type and Audience

Select your audience list type:

- **Static List** – For templates without media or variables.
- **Dynamic List** – For templates with variables or media.

You can choose a **pre-existing list** from the dropdown or **create a new list** during campaign setup.

> Only `.csv` files (up to **70 MB**) are supported.
>
> - The first column must contain **phone numbers** (10 digits for India; country code optional for India, mandatory for international).
> - You can add up to **5 additional columns** for variables (for dynamic lists only).
> - Use **Dynamic List** if your template includes media or variables; otherwise, use **Static List**.

Step 2: Select a Template

All approved templates mapped to the selected WABA ID appear in this step.

You can:

- Filter templates by **Status** or **Language**.
- Search templates by **Name**.
- Preview templates before selection.

If the template you need isn't visible, check the **Template Management** page or create a new one.

Step 3: Configure Template Variables

If the selected template includes variables, map them to the CSV column headers.

- Select column names from the dropdown for each variable.
- For media headers (images, videos, documents), provide a **public URL**.
- Preview your message after replacing variables to confirm accuracy.

Step 4: Schedule Your Campaign

Choose how and when the campaign should run:

- **Now** – Starts 5 minutes after creation.
- **Later** – Schedule for a specific date and time.
- **Repeat** – Repeat the campaign for up to 30 days.

> For **daily repeats**, specify the end date.
> For **weekly repeats**, select the days of the week and the end date.

Click **Create Campaign** to confirm.

View Campaign Details

Once a campaign is created, it appears in the **WhatsApp Campaigns** list.

Each row displays:

- Campaign Name
- Schedule Time
- Status
- Performance Summary
- Created By and Created Date

You can use the **action menu** beside each campaign for the following options:

Action	Description
Pause	Stop sending messages for scheduled or in-progress campaigns.
Resume	Continue sending to pending numbers (only for paused campaigns).
Complete	Mark campaign as completed; remaining numbers are set as `failed_expired`.
Archive	Move completed or scheduled campaigns to archived view.
Download	Download completed campaign reports (attach sample report).

Filters, Search, and Sorting

- **Filter** campaigns by status.
- **Search** by campaign name (minimum three characters).
- **Sort** by campaign name or schedule time.

Performance Overview

Displays campaign performance across three key statuses:

- **Completed**
- **Failed**
- **Scheduled**

> Hovering over counts provides details:
>
> - **Failed** expands into Failed, Failed No Attempt, Failed No Balance, Invalid.
> - **Scheduled** expands into Submitted and Scheduled messages.

WhatsApp Campaign Summary and Statistics

Clicking a campaign opens the **Campaign Summary and Stats** page.

Campaign Details

Displays key information about your campaign, including:

- Audience lists used
- Associated WABA ID
- Sender WhatsApp number
- Template name and category
- Campaign start and end times
- Message content summary

Campaign Stats

Displays real-time message statistics.
Click the **refresh icon** to update data (up to 5-minute delay).

Status	Meaning
Scheduled	Numbers queued for sending.
Submitted	Messages submitted to Meta.
Sent	Messages sent from Meta.
Delivered	Message delivered to user.
Read	Message read by user.
Failed	Delivery failed.
Failed – No Attempt	Campaign ended before all messages were sent or duration expired.
Failed – No Balance	Insufficient Exotel balance.
Invalid	Invalid phone number format or non-existent number.

View Message Details

This section lists every message sent in the campaign.
Each record includes:

- Number
- Name (if saved in contacts)
- Detailed Status
- Sent Time
- Delivered Time

The **action menu** shows:

- Message SID
- Read Time

1.5.1. Quick Reply Payload Mapping

Quick Reply Payload Mapping lets you attach a hidden, per-contact value to each quick-reply button in a **WhatsApp Campaign**. When a contact taps the button, Exotel returns that value to your chatbot or webhook as the button **payload**. The contact never sees it.

Use it when a button tap needs carry a business key, such as a Ticket ID, Order ID or Customer ID, so the conversation that follows can be tied back to the right record.

How it works

1. Your contact list includes a column with the key you want to pass, for example **TicketId**.
2. While creating the campaign, you map that column to a quick-reply button.
3. Every contact receives the same message with the same button labels. Only the hidden payload differs per contact.
4. When a contact taps the button, the inbound message contains both the button label and that contact's mapped value.
5. Your chatbot reads the payload, stores it in the session and continues the flow, for example a survey tagged with the Ticket ID.

Example

Contact	Button shown	Payload received on tap
9198XXXXXX01	Yes	TCK-48213
9198XXXXXX02	Yes	TCK-48214

Before you begin

- You need an approved WhatsApp template that has at least one **Quick Reply** button.
- To send a different value to each contact, use a **Dynamic List** (CSV upload) that includes a column for the value.
- Each payload value can be at most **128 characters**, which is Meta's limit.

Note: You don't need to enable anything. The **Quick Reply Payload Mapping** section appears automatically whenever the selected template has quick-reply buttons.

Prepare your contact list

Add one extra column to the CSV you upload as a Dynamic List, alongside your usual columns:

number	Name	TicketId
919800000001	Riya	TCK-48213
919800000002	Arjun	TCK-48214

The column name can be anything. You'll select it from a dropdown in the next step.

Map a payload to a quick-reply button

1. Go to **Tools** → **Campaigns** → **WhatsApp** and click **Create Campaign**.
2. Fill in the campaign details, select your sender number and select your **Dynamic List**.
3. Select a template that has quick-reply buttons.

4. Map the **Body** variables (and header or URL-button variables, if any) as usual.
5. Under **Buttons**, find the **Quick Reply Payload Mapping** section. Its helper text reads: *"Map a list column per button. Sent as payload on tap; not shown on the button."*
6. Each quick-reply button is listed by its label, for example **{{Yes}}** or **{{No}}**. For each button you need:
   - Open the **Select CSV column** dropdown and choose a column, for example **TicketId**. It's saved as **@@TicketId** and resolved separately for each contact at send time.
   - **Or** type a fixed value in the field, for example **survey_yes**. The same value is sent for every contact.
7. Leave any button you don't need blank. Blank buttons are valid and won't block campaign creation.
8. (Optional) Click **Send Test** to send a test message. The test dialog shows the same payload fields so you can enter sample values.
9. Schedule or launch the campaign.

Tip: For carousel templates, every card that has quick-reply buttons gets its own payload fields, which work the same way as top-level buttons.

Note: When you copy or edit a campaign, the saved payload mappings are restored automatically.

What your chatbot or webhook receives (for developers)

Outbound (what Exotel sends to WhatsApp)

For each mapped button, the template message includes a **quick_reply** button component with the resolved value:

JSON

```
{
  "type": "button",
  "sub_type": "quick_reply",
  "index": "0",
  "parameters": [
    { "type": "payload", "payload": "TCK-48213" }
  ]
}
```

index is the button's 0-based position in the template. Unmapped buttons are not included and use the platform default payload, which is typically the button text.

Inbound (when the contact taps the button)

JSON

```
{
```

```
 "whatsapp": {
  "messages": [
   {
    "callback_type": "incoming_message",
    "from": "+919800000001",
    "to": "+919282210101",
    "content": {
     "type": "button",
     "context": { "sid": "<sid of the campaign message>" },
     "button": {
      "payload": "TCK-48213",
      "text": "Yes"
     }
    }
   }
  ]
 }
}
```


Field	Meaning
content.type	Always button for a quick-reply tap
content.button.payload	The value you mapped for this contact (for example, the Ticket ID)
content.button.text	The button label the contact tapped
content.context.sid	The SID of the original campaign message

In your chatbot, read **content.button.payload** into a session variable to tag the rest of the conversation with it.

Validation rules

Situation	Result
Template has no quick-reply buttons	The section is hidden
Button left blank	Allowed; the default payload is sent
Value longer than 128 characters	Rejected with: *"Quick reply payload must be at most 128 characters"*
A column (@@...) is mapped while a **Static List** is selected	Blocked with: *"Templates with dynamic variables are only supported with dynamic lists. Please switch to a dynamic list or choose a template without variables."*
URL, Phone Number, Copy Code buttons	Unchanged by this feature

FAQs and troubleshooting

Will the contact see the payload? No. The contact sees only the approved button label. The payload is delivered only in the inbound webhook.

Can I change the button label? No. Button labels come from the Meta-approved template. This feature controls only the hidden payload.

Is mapping mandatory? No. The fields have no red asterisk (*). Map only the buttons you need.

My chatbot receives the button text instead of my value. Why? Check that:

- The button was mapped in the campaign. Open the campaign with **Copy** or **Edit** to confirm the mapping.
- The mapped CSV column has a value for that contact. An empty cell means there's no custom payload.
- Your bot reads **content.button.payload**, not **content.button.text**.

I get a "dynamic lists" error when creating the campaign. You've mapped a CSV column while a **Static List** is selected. Switch to a **Dynamic List** with that column, or enter a fixed value instead.

My value is longer than 128 characters. Meta caps the payload at 128 characters, and Exotel rejects longer values instead of cutting them short. Use a shorter key, such as an ID, and look up the full details in your own system.

Does this work for regular chat (session) messages? No. It applies only to template messages sent through **WhatsApp Campaigns**.

Can I use different columns for different buttons? Yes. Map each button independently, for example **Yes** → **TicketId** and **No** → **CustomerId**.

Related articles

- WhatsApp Campaign
- Manage Lists and Contacts

1.6. Dialer Campaign

The **Auto-Dialer** feature is Exotel's outbound dialer (OBD) solution. It automates outbound calling by connecting available agents to customers from a list, removing the need for agents to manually dial. When an agent starts a dialer campaign, the system calls the agent first (leg1) and then dials the next contact (leg2), significantly improving agent productivity and throughput.

Key benefits

1. **Agent-first connection** – The agent is called first and then connected to customers from the list.
2. **Higher agent productivity** – Removes manual dialing and list management overhead.
3. **Retry options** – Configure retry logic for unsuccessful attempts.
4. **Campaign-level reporting** – Download reports after campaign completion.
5. **Supervisor and agent workflows** – Separate supervisor and agent views and permissions.
6. **Integration with New Campaigns address book** – Use Lists & Contacts created under New Campaigns.
7. **Per-campaign settings** – Caller ID, IVR, popup URLs, and passthru URLs for CRM integration.

Prerequisites

- Active Exotel account with **Campaigns (Auto-Dialer)** enabled.
- A valid **Exophone** number.
- Address-book entries (Lists & Contacts) in **New Campaigns**.
- A group of agents in **Co-workers (Agents) and Groups**.
- Sufficient prepaid credits (if using a prepaid account).

> Create lists and groups before creating a Dialer campaign. The Dialer campaign uses the same Address-book (Lists & Contacts) as other New Campaign features.

Access Dialer Campaigns

1. In the dashboard left-hand panel, go to **Tools** → **Campaigns (New)**.
2. Open the **Campaigns** tab and select **Dialer Campaigns**.

Create a Dialer Campaign

Click **Create Dialer Campaign** to open the campaign creation popup. Provide all required fields; the popup enforces mandatory inputs.

Required fields:

- Campaign Name (min 3 characters)

- Dial Numbers (List or Dial Whom URL)
- Campaign Participants (Agent or Group)
- Start Date & Time and End Date & Time
- Caller ID (Exophone)
- Number of Retries and Retry settings
- Retry-on statuses (e.g., busy, no-answer, failed)
- Call Type (default: Transactional)

Dial numbers (choices)

- **List:** Select a pre-created list of numbers from Address-book.
- **Dial Whom URL:** Provide an endpoint that returns numbers to call. See *Working With Connect (Dial Whom)* for details on URL format and expected response.

> All lists must be created before starting the campaign. If you use a list, a copy of the list is taken at campaign creation time; subsequent changes to the original list are not applied to the running campaign.

Campaign participants

- **Group/Agents:** Choose a single agent or a group of agents who will be connected to calls. Groups must be pre-created in Co-workers (Agents) and Groups.

Optional integration fields

- **Popup URL (optional):** URL to display live call details in agent CRM.
- **Call Completed Passthru URL (optional):** Exotel will POST call completion data to this URL.
- **Call No Answer Passthru URL (optional):** Exotel will POST no-answer events to this URL.
- **Get Contacts URL (optional):** URL to fetch contact metadata (name, order id, address, etc.).

> Refer to the Passthru and Connect support articles for payload formats and implementation details.

Content options

1. **Type text:** Enter the text to be played to customers. Use `@@` to map CSV variables for dynamic text.
2. **Select a Flow:** Choose a pre-built flow from the App Bazaar.
3. **Create an IVR:** Build a simple IVR inline. Configure prompts, DTMF mappings, and no-input repeats (default repeat after 5 seconds).

Scheduling and caller ID

- **Start Date & Time:** Must be >= current time. Default trigger delay up to 2 minutes.
- **End Date & Time:** Defaults to 30 days after start. Minimum end time is 2 minutes after start.
- **Caller ID:** Select the Exophone number displayed to recipients.

Retry settings

- **Number of retries:** 0–3 (default 0).
- **Retry interval (minutes):** Required when retries > 0.
- **Retry mechanism:** `Linear` (equal spacing) or `Exponential` (doubling intervals).
- **Retry-on statuses:** Choose which outcomes mark a call for retry (e.g., `busy`, `no-answer`, `failed`).

Personas and permissions

Supervisors

- Create and assign campaigns.
- View live campaign status and call details.
- Archive campaigns, mark as complete, and download reports.
- Can act as agents if added to a group.

Agents

- Cannot create or assign campaigns.
- Can view and start campaigns assigned to them.
- See live callee details and call controls.
- Start/stop behavior governed by campaign state and availability.

Starting and stopping an Auto-Dialer campaign (agent flow)

- Agents start a campaign from their Auto-Dialer Campaign page by clicking **Start** (disabled until campaign start time).
- When Start is clicked:
  1. The agent is called first (leg1).
  2. Once agent connects, the system dials the next contact (leg2).
  3. Agent remains nailed on leg1 for subsequent calls.
- Agent can hang up to stop; clicking **Start** resumes from the next available number.

> If a Supervisor is also in the agent group, they can switch between **Supervisor** and **Agent** views using the switch at the top of the campaign screen.

Manage Campaign

The Dialer Campaigns list displays Campaign Name, Campaign Type, Date Created, Schedule Time, Status, and Performance.

Action menu (state-dependent):

- **Pause** – Stop further dialing (scheduled & in-progress).

- **Resume** – Continue dialing remaining numbers (paused only).
- **Complete** – Mark paused campaign completed; remaining numbers become `Failed_NoAttempt`.
- **Archive** – Archive completed or scheduled campaigns.
- **Download** – Download completed campaign reports.

List tools: Filter by status, search by campaign name (min 3 characters), sort by campaign name, date created, or status.

Campaign summary & stats (Supervisor view)

Click a campaign to open the summary/stats page. The page has two main sections: campaign-level metadata and call-level details.

Campaign Details

Provides an overview of all campaign-level settings and identifiers:

- Campaign name and status
- Dial numbers source (list or Dial Whom URL)
- Campaign participants (agent/group)
- Caller ID
- Start and end times
- Number of retries, retry interval, and retry mechanism
- Retry-on statuses
- Call type and duplicate-number behavior
- Popup & passthru URLs
- Per-campaign throttle (if applicable)

Campaign Stats

Real-time number-level call data (refresh updates; up to 5-minute delay).

Number states:

- **Scheduled** – Pending dial.
- **In progress** – Currently dialing/connected.
- **Retry** – Queued for retry after a failed attempt.
- **Retrying** – Actively retrying the number.
- **Failed** – Invalid/unreachable numbers.
- **Failed DND** – Blocked due to NDNC registry.
- **Failed Balance** – Not dialed due to insufficient account balance.
- **Failed No-Attempt** – Not dialed because campaign completed or timed out (30-day limit).
- **Completed** – Successfully connected.
- **Invalid** – Unknown or malformed number state.

Call details (Supervisor and Agent views)

Lists each call with:

- Contact number and name (if in Contacts)
- Date created and call duration
- Call status and detailed status
- DTMF selection and call recording (link)
- Action menu with start/end times, direction, and Call SID

Search by number (min 3 characters) | **Filter** by call status | **Sort** by created date

Call statuses include: **Completed**, **Failed**, **No answer**, **Busy**.

Ending the Auto-Dialer campaign

Supervisor / Admin

- Admins can **Mark as Complete** at any time.
- If marked complete while agent calls are in-progress, those calls will finish uninterrupted but no new calls will be placed.
- If no new or retry numbers remain, the campaign is automatically complete.

Agent

- Agents can stop the campaign by hanging up.
- Agents can later resume by clicking **Start** (if new or retry numbers exist).
- Start is disabled when no new or retry numbers are available.

Auto-Dialer limitations and compliance

- **Allowed time frame (India):** Calls permitted only between **9 AM and 9 PM** per TRAI regulations.
- **Maximum duration:** Campaigns run up to **30 days**. After 30 days the campaign is marked **Completed** and remaining numbers become `Failed_NoAttempt`.
- **List immutability:** Once a campaign starts, changes to the source list do not affect the running campaign (a copy is used at creation).
- **Group flexibility:** Agents can be added or removed from the selected group even after campaign start.
- **List limit:** Only **one list** allowed per Dialer campaign. Maximum contacts per list: **1 lakh**.

> For high-volume operations, coordinate with your Account Manager to ensure compliance with regional regulations and to confirm account throttling or capacity settings.

1.7. Manage Lists and Contacts

The **Lists** and **Contacts** features act as an integrated **address book** within the **New Campaigns Dashboard**. Together, they help manage audience data efficiently for all campaigns – including Call, SMS, WhatsApp, and RCS.

Overview

- **Lists** store collections of customer numbers and associated details.
- **Contacts** represent individual customers with unique numbers, which can belong to multiple lists.
- Both are accessible from the **New Campaigns Dashboard**, under the **Lists** and **Contacts** tabs.

Create a List

1. Navigate to the **Lists** tab on the New Campaigns dashboard.
2. Click the **Create List** button on the top right to open the creation pop-up.
3. Enter a **List Name** in the provided field.
4. If you have a CSV file with your contact list, click **Browse Files** or drag and drop the file into the pop-up.
5. If you don't have a list, download the **sample CSV file**, fill it with your contact data, and upload it.
6. Click **Create List** to finish.

A blank list can also be created by providing only a List Name. Contacts can be added later via CSV upload or directly through the **Contacts** tab.

> MacBook users should avoid editing CSV files in the **Numbers app**, as it can corrupt formatting.
> Instead, use **TextEdit** or another plain-text editor to modify and save CSV files.

> Please add only numbers in your list.
> Do **not** include the country code `91` – the system automatically appends it for Indian numbers.

View Lists

All lists created under Campaigns appear in the **Lists** tab.

Each list entry displays:

- **List Name**

- **Number of Contacts**
- **Date Created**

Available actions:

- **Edit:** Modify list name or replace CSV.
- **Download CSV:** Export the current list.
- **Delete:** Permanently remove the list.

Search and sort options:

- **Search** by list name.
- **Sort** by list name or created date.

Create a Contact

1. Navigate to the **Contacts** tab.
2. Click **Create Contact** in the top-right corner to open the pop-up.
3. Provide contact details:
    - First Name
    - Last Name
    - Phone Number
    - Email ID
    - Company
    - Custom Tags (JSON key-value pairs)
    - Lists (select one or more existing lists)
4. Click **Create Contact** to save the new contact.

Example of Custom Tags JSON format:

```
{ "key1": "value1", "key2": "value2" }
```

A contact can belong to **multiple lists** simultaneously.

View Contacts

The **Contacts** tab displays all contacts created manually or imported from lists.

- Contacts that belong to multiple lists are shown once (deduplicated by number).
- Each entry includes:

- **Contact Name**
- **Phone Number**
- **Email ID**
- **Company**
- **Associated Lists**
- **Date Created**
- **Custom Tags**

Available actions:

- **Edit Contact:** Update details or tags.
- **Delete Contact:** Permanently remove the record.

Search and filter tools:

- **Search** by name or number.
- **Filter** by list name.

Address Book (Classic Dashboard)

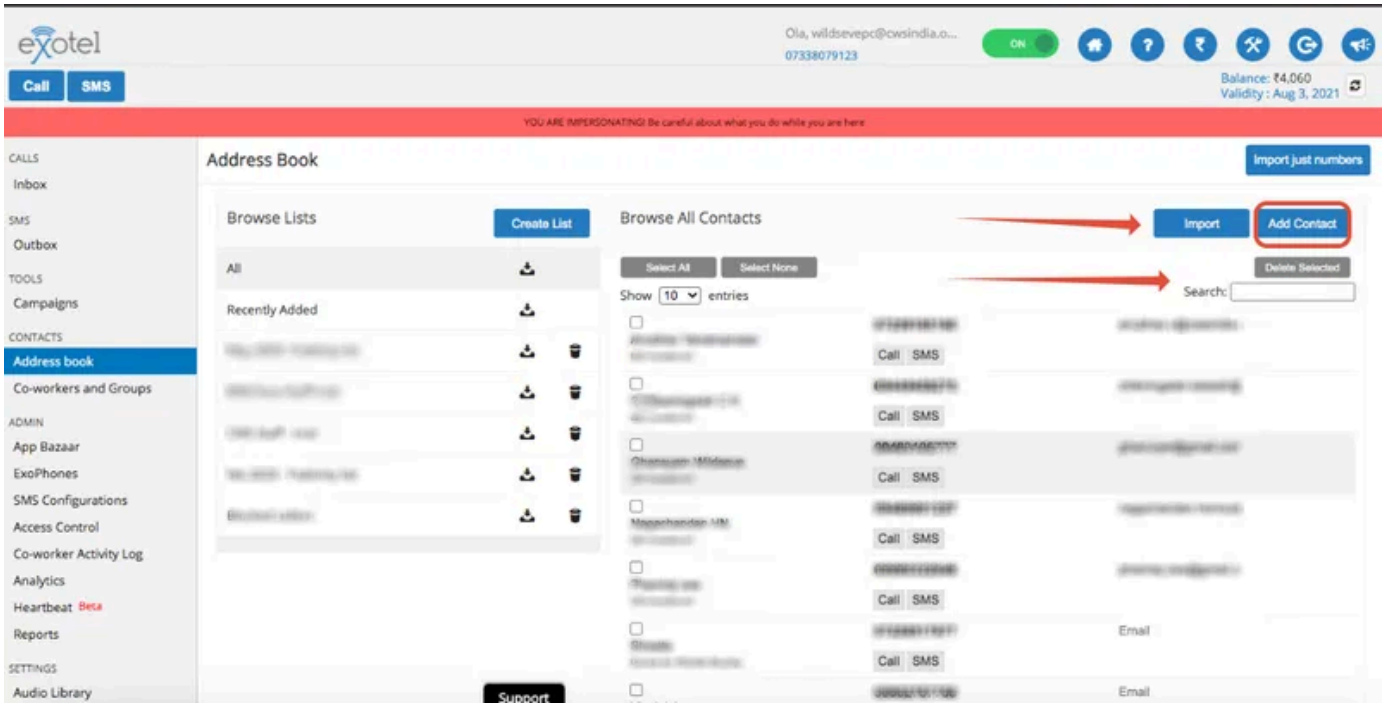
> **Reviewer action required — classic dashboard.** The Address Book, Lists, and import/export steps in this and the following section were documented for the older Exotel dashboard. Confirm that this interface (the **Address Book** page, the **Import** and **Export** buttons, the left-pane **Lists**, drag-and-drop, and the default **All** / **Recent Contacts** lists) still matches the current product before publishing. The sections above describe the New Campaigns Dashboard, so the two interfaces may differ.

Short video: View walkthrough

To get started, click on **Address Book** on the Exotel dashboard.

Adding contacts

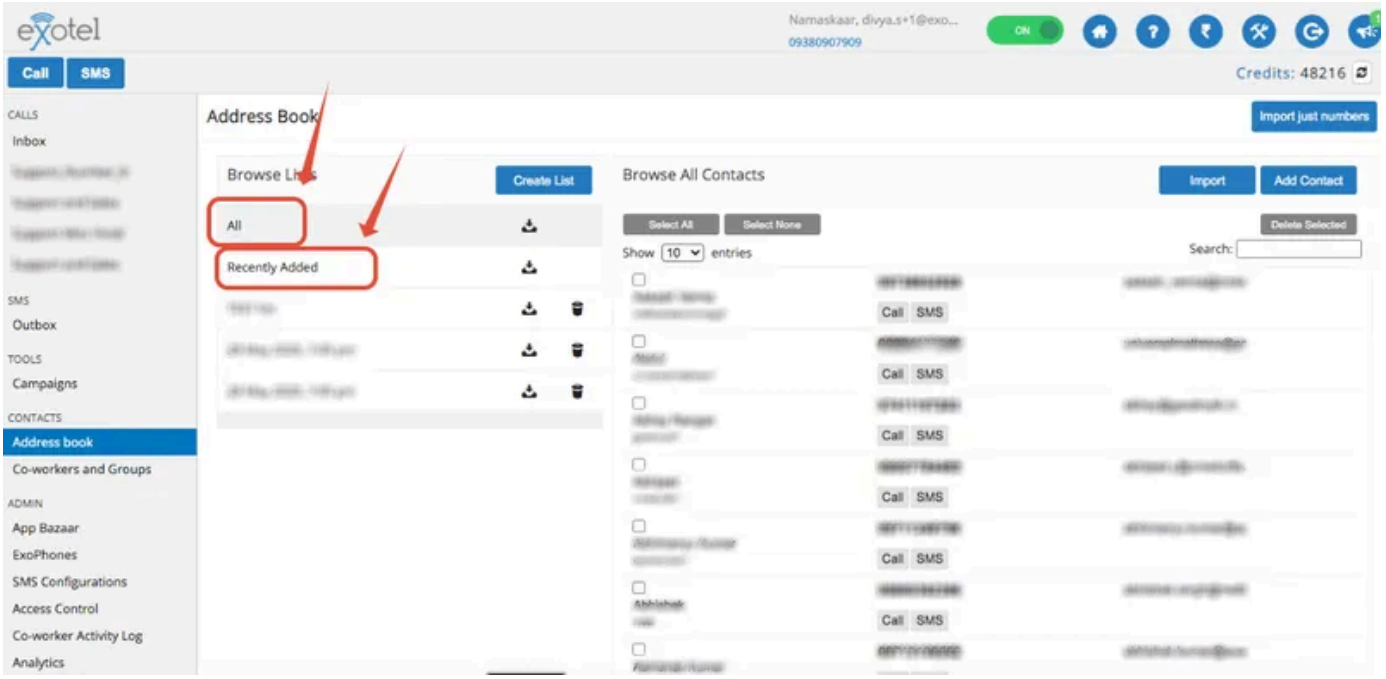
In the **Browse Contacts** section, click the **Add contact** button and enter contact information like name, email, and company.



You can search for contacts in the address book by name, phone number, and email.

Lists

All your lists are visible in the left pane of the Address Book page.



There are two lists named **All** and **Recent Contacts** created by default.

- You can add a list using the **Add List** button and then import your contacts from a **CSV** file into a list.
- All contacts imported into the lists are also added to the address book by default.

- You can also add your address book contacts into a list by dragging and dropping the contact into the list on the left pane (the contact becomes draggable when the mouse pointer changes).

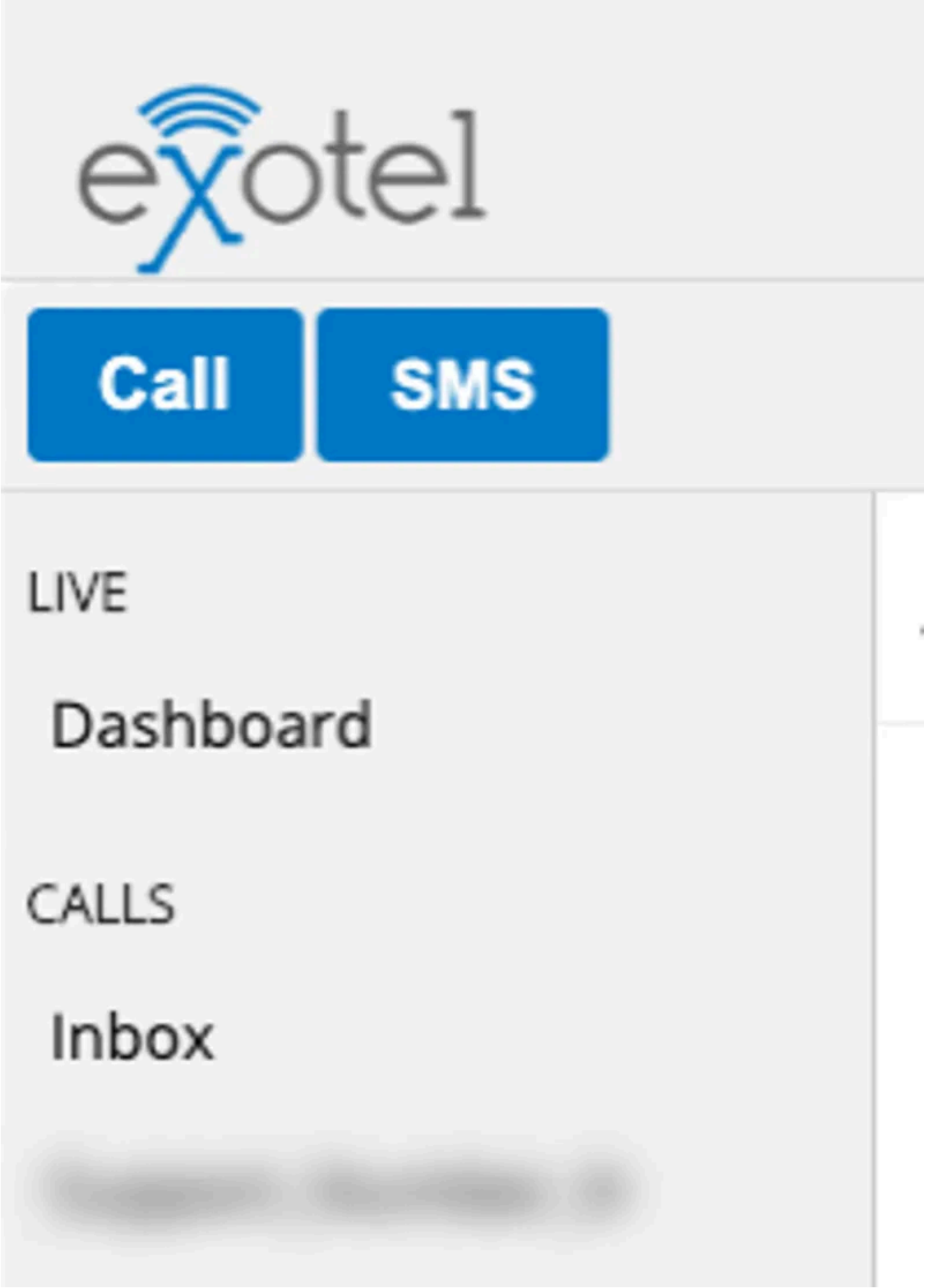
Import and Export Numbers (Classic Dashboard)

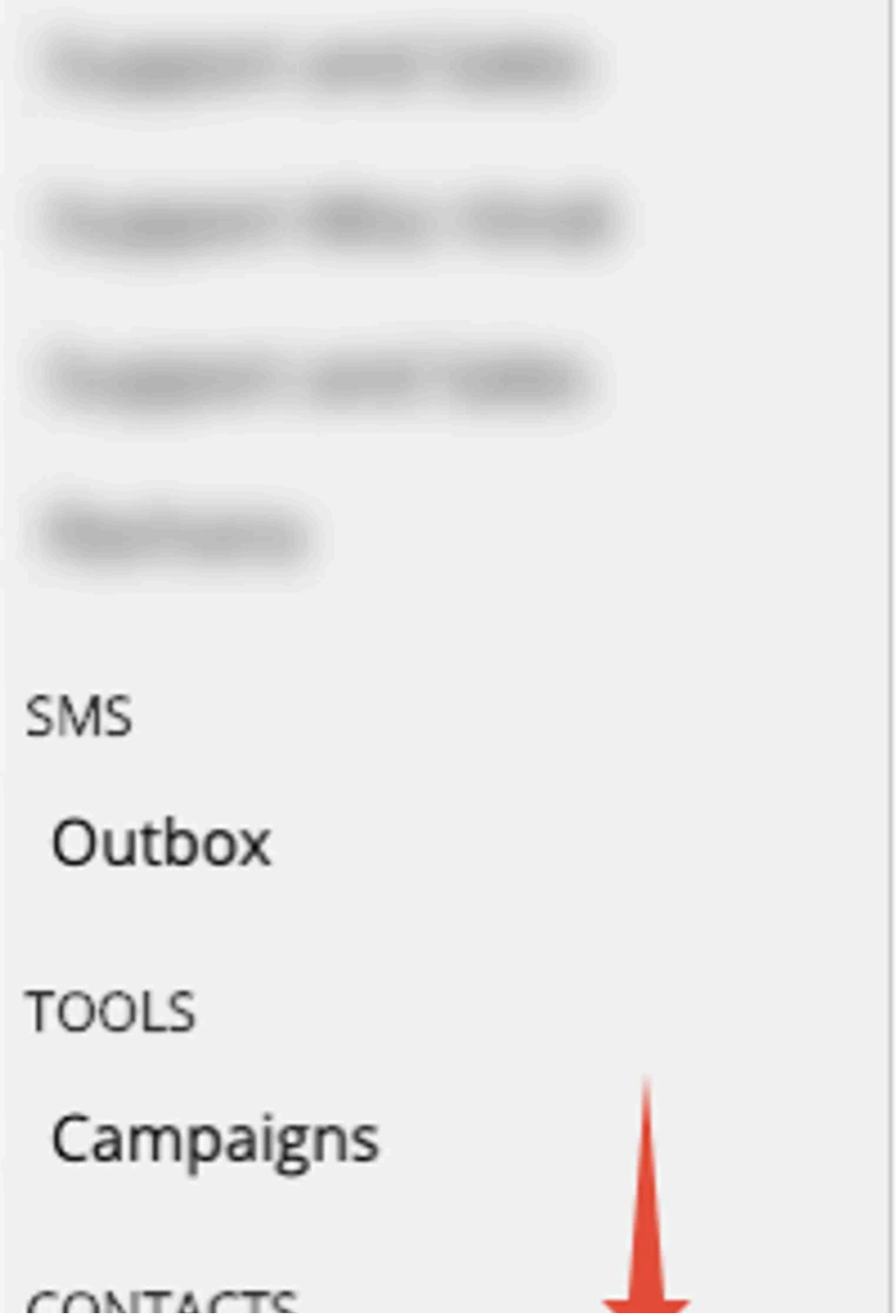
Short video: View walkthrough

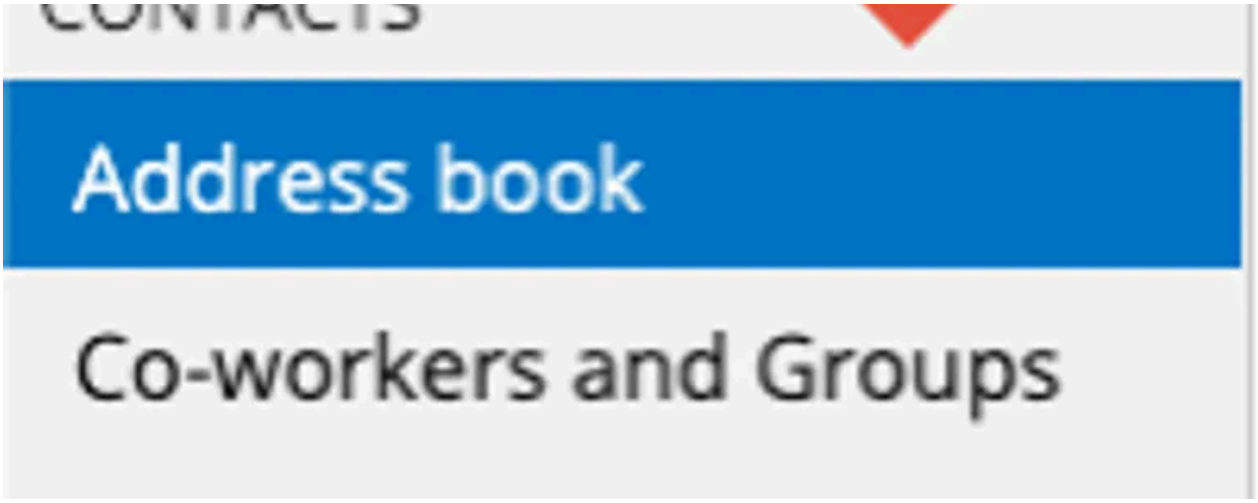
Import numbers to a list

To import an excel sheet in a specified format, follow the below steps:

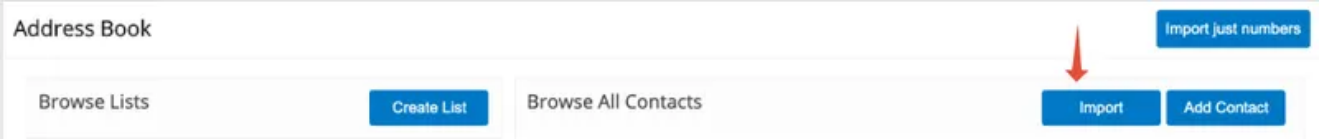
1. Click on the address book on your Exotel dashboard.


exotel
Call
SMS
LIVE
Dashboard
CALLS
Inbox

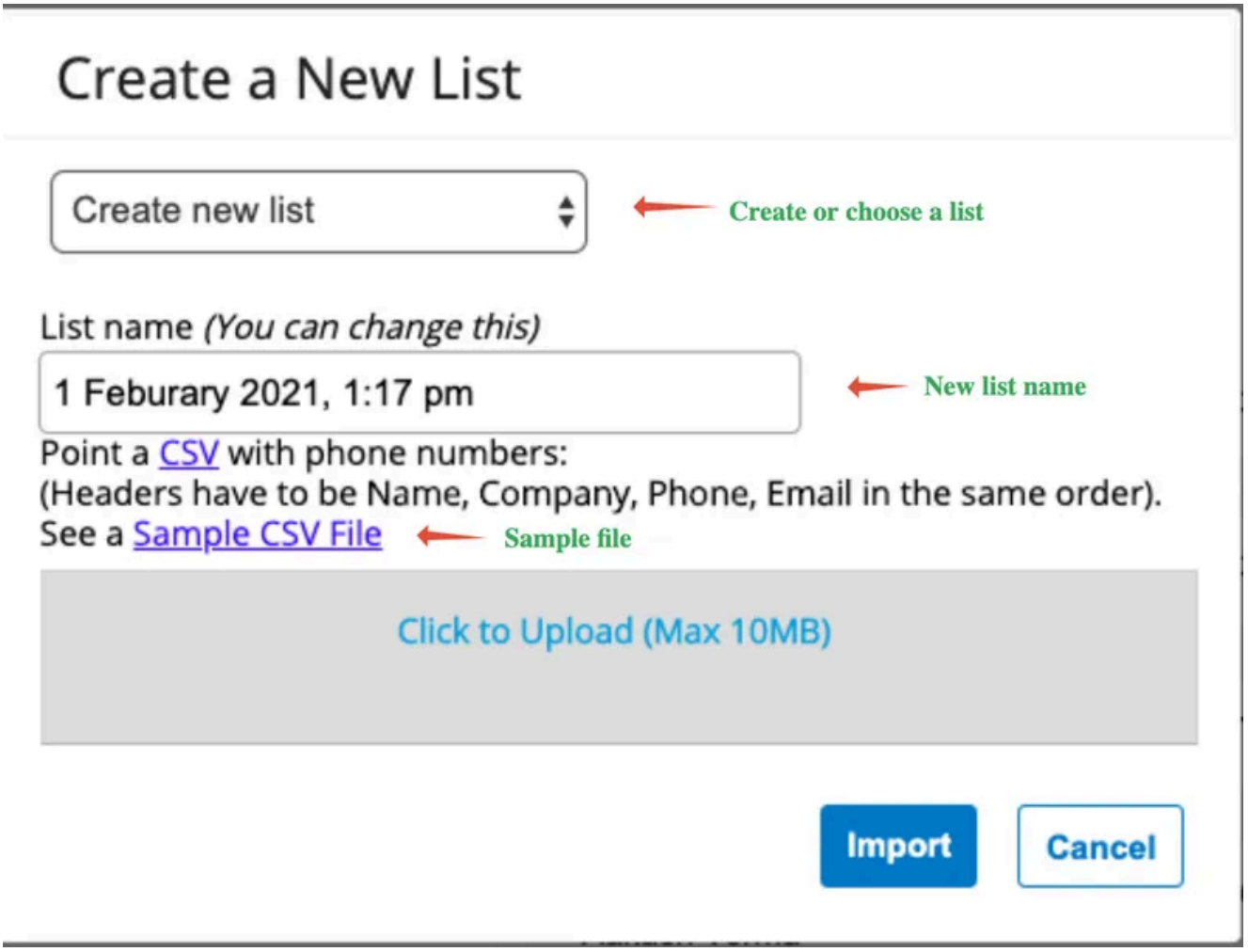

SMS
Outbox
TOOLS
Campaigns



2 Click on the **Import** button to import the contacts.



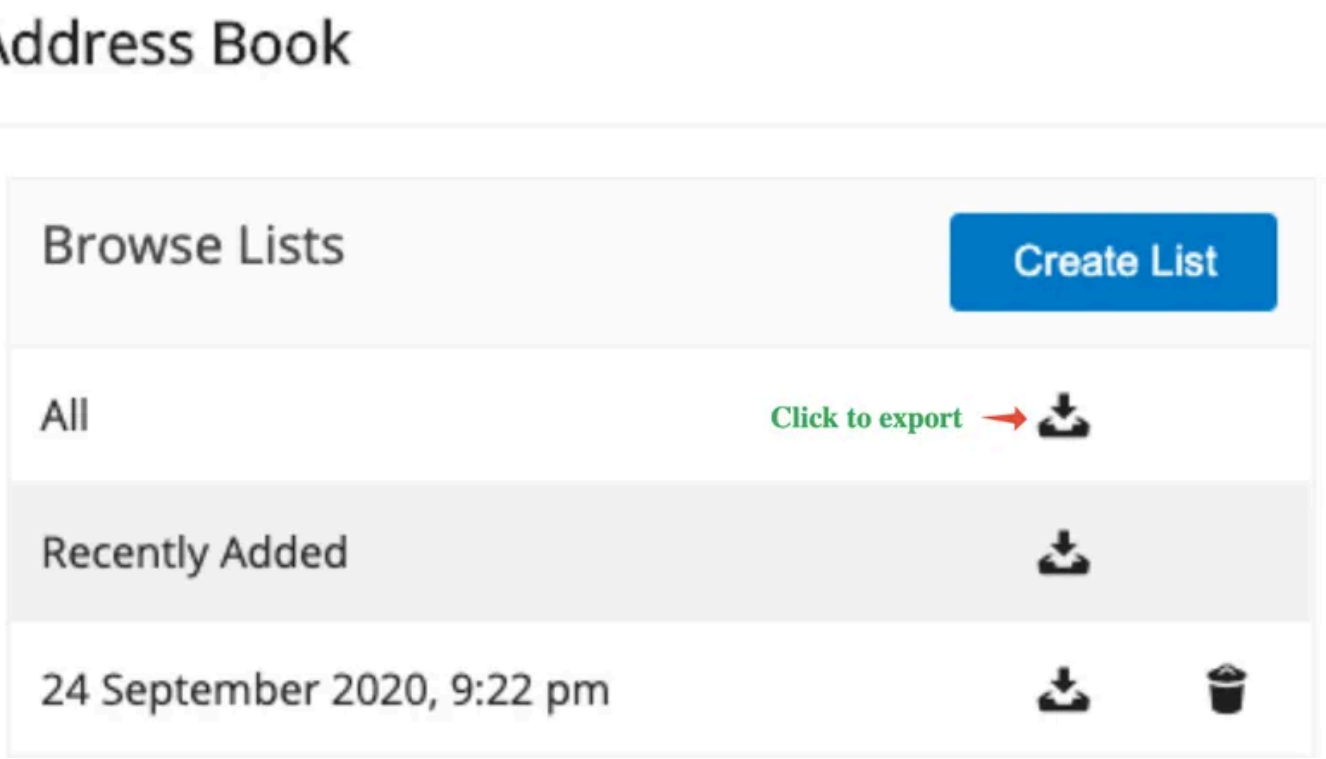
3 You can either create a new list by giving the name of the list or choose an existing list. By default, the current date-time is used as the list name.



Format of import: The format of the CSV file is Name, Company, Phone, and Email. Refer to `Sample_Address_Book.csv` for help.

Export numbers from a list

To export numbers from a list of all entries in an address book, use the export button right next to the list in the address book.



If you have any questions or concerns, please connect with us using the **chat widget** on your Exotel Dashboard or Whatsapp us on **08088919888**.

Default Call Capacity

By default, the **call capacity** for campaigns is **60 calls per minute (CPM)**.
To increase this limit (for faster dialing), please contact your Exotel Account Manager.

> Higher call capacity requests are subject to approval and account eligibility.

Limitations

Regulatory and System Constraints

- **Allowed Time Frame:** Outbound campaign calls are permitted only between **9 AM and 9 PM (IST)** per **TRAI regulations**.
- **Languages Supported:** Hindi, English, and Bahasa (Indonesia).
- **Audience File Limits:**
  - Maximum **10 variables** per audience file.
  - File size must be less than **70 MB**.
- **Scheduling Limit:** A maximum of **20 campaigns** can be scheduled simultaneously.
- **Data Retention:**

- Campaign details (including call logs, reports, and stats) are retained for **3 months**.
- Older campaigns are automatically removed from the dashboard.
- Reports for expired campaigns cannot be generated from the dashboard.

> To retain historical data, **download campaign reports weekly or monthly**.
> This ensures long-term access to performance and compliance records.