



Business Phone System

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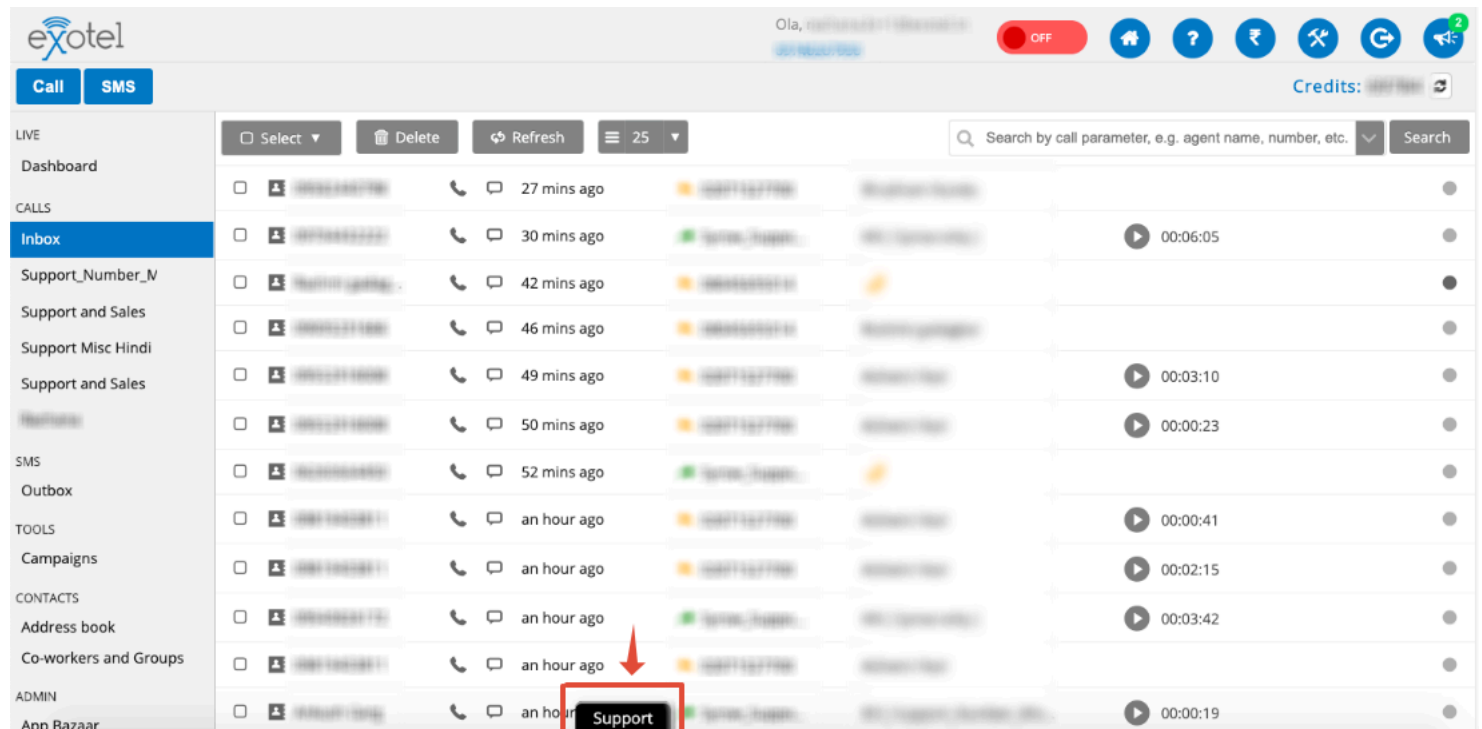
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1. Request Additional Trial Credits



The screenshot shows the Exotel dashboard interface. On the left is a sidebar menu with categories like LIVE, DASHBOARD, CALLS, and SMS. The 'Inbox' is selected under CALLS. The main area displays a table of recent calls. Each row includes a checkbox, a profile icon, a name, a status icon, a time ago, a call icon, a duration, and a play button. The bottom row of the table has a 'Support' button highlighted with a red box and a red arrow pointing to it.

SELECT	DELETE	REFRESH	25	SEARCH
☐		27 mins ago		00:06:05
☐		30 mins ago		00:03:10
☐		42 mins ago		00:00:23
☐		46 mins ago		00:00:41
☐		49 mins ago		00:02:15
☐		50 mins ago		00:03:42
☐		52 mins ago		00:00:19
☐		an hour ago		
☐		an hour ago		
☐		an hour ago		
☐		an hour ago		
☐		an hour ago		

Overview

If you'd like some more free credits to test out specific features of Exotel during your trial, you can request them by reaching out to the Exotel team.

How to request additional credits

You can connect with us using the chat widget on your Exotel Dashboard or Whatsapp us on 08088919888.

2. Track Calls from Google Ads

If you use [Google Ads](#) – the online advertising service developed by Google – and have enabled [call reporting](#), which runs on a [Google forwarding phone number](#), you may not be able to capture the caller's actual "From" number on your Exotel dashboard for calls routed to your ExoPhone through Google Ads. Exotel receives the call from the number allocated by Google, and that is the number displayed on your dashboard.

Why the caller's number is not captured

According to [Google's call reporting FAQ](#), customers' calls are routed through a Google forwarding number, which lets you gather data about the call. Google notes that caller ID still works for calls routed through Google forwarding numbers, "except in India". Further down the same article, Google indicates that Japan has the same limitation.

If your callers are affected by this limitation, your Exotel dashboard shows the Google-allocated forwarding number instead of the caller's actual number.

Show the actual caller number

Use a [separate ExoPhone number](#) for each of your [Ad Groups](#). You can then [disable the Google forwarding number](#) and choose the "Use my own phone number" option instead of a forwarding one. This solves the problem: calls reach your ExoPhone directly, so the caller's actual number appears on your Exotel dashboard.

Need more help?

If you wish to understand this in detail, reach out to the [Customer Happiness Team](#) at 08088919888 or write to hello@exotel.in. The team is available 24/7.

3. Test New Business Logic Before Going Live

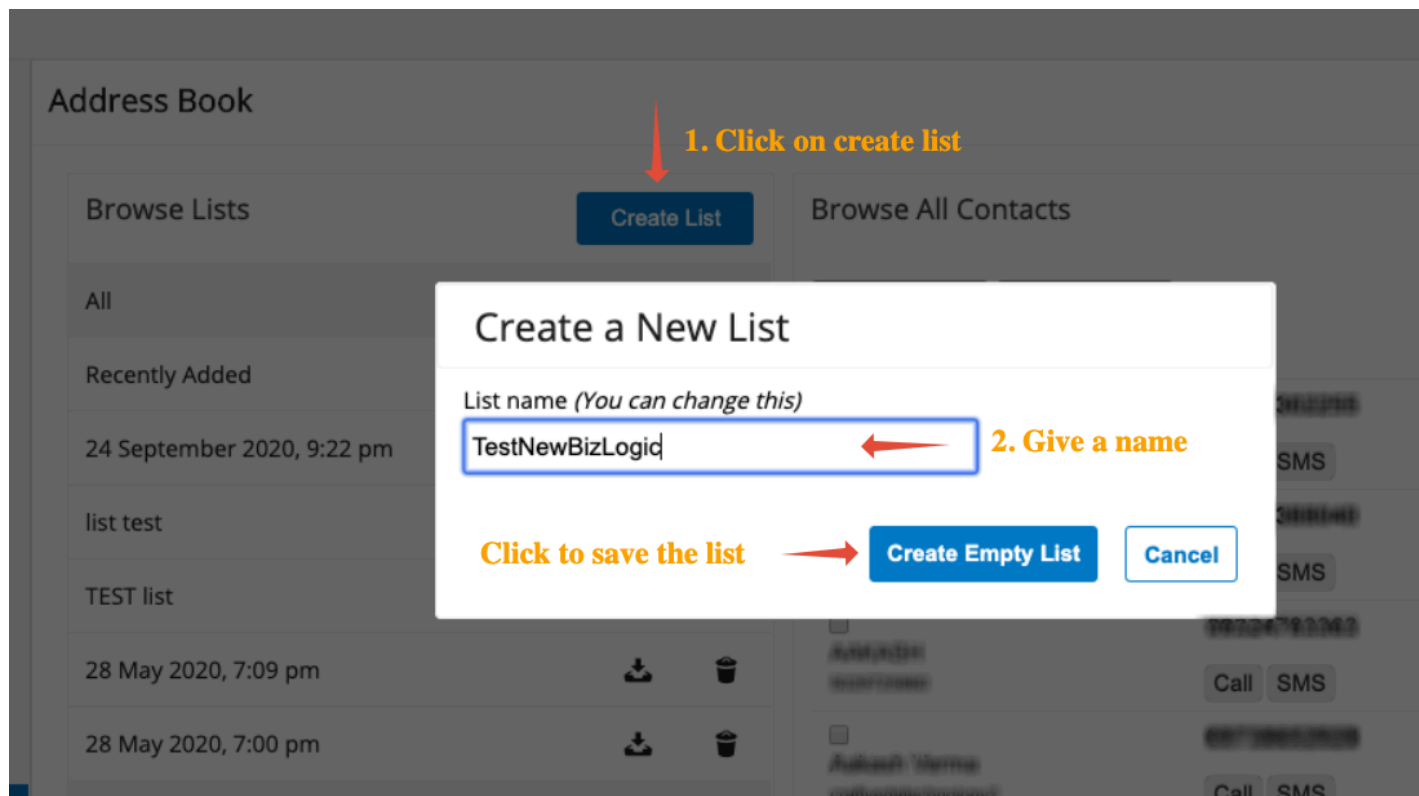
In many cases, you might want to improve your existing business logic. Once you've created the new business logic, you can test it before switching your callers over: route calls from a designated test number to the new flow, while every other caller continues through your existing flow.

Create a test contact list

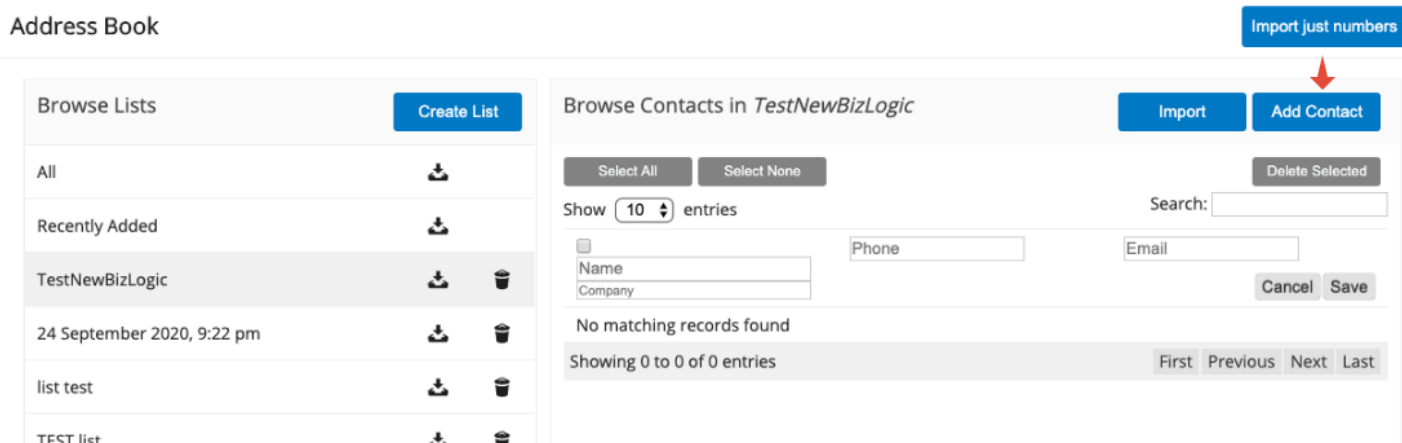
1. Log in to your Exotel dashboard and go to the **Address Book** page (<http://my.exotel.in/addressbook>).

Browse Lists		Create List
All		
Recently Added		
24 September 2020, 9:22 pm		
list test		
TEST list		
28 May 2020, 7:09 pm		
28 May 2020, 7:00 pm		

2. Create a new list. Call it "TestNewBizLogic", or something else that's descriptive.

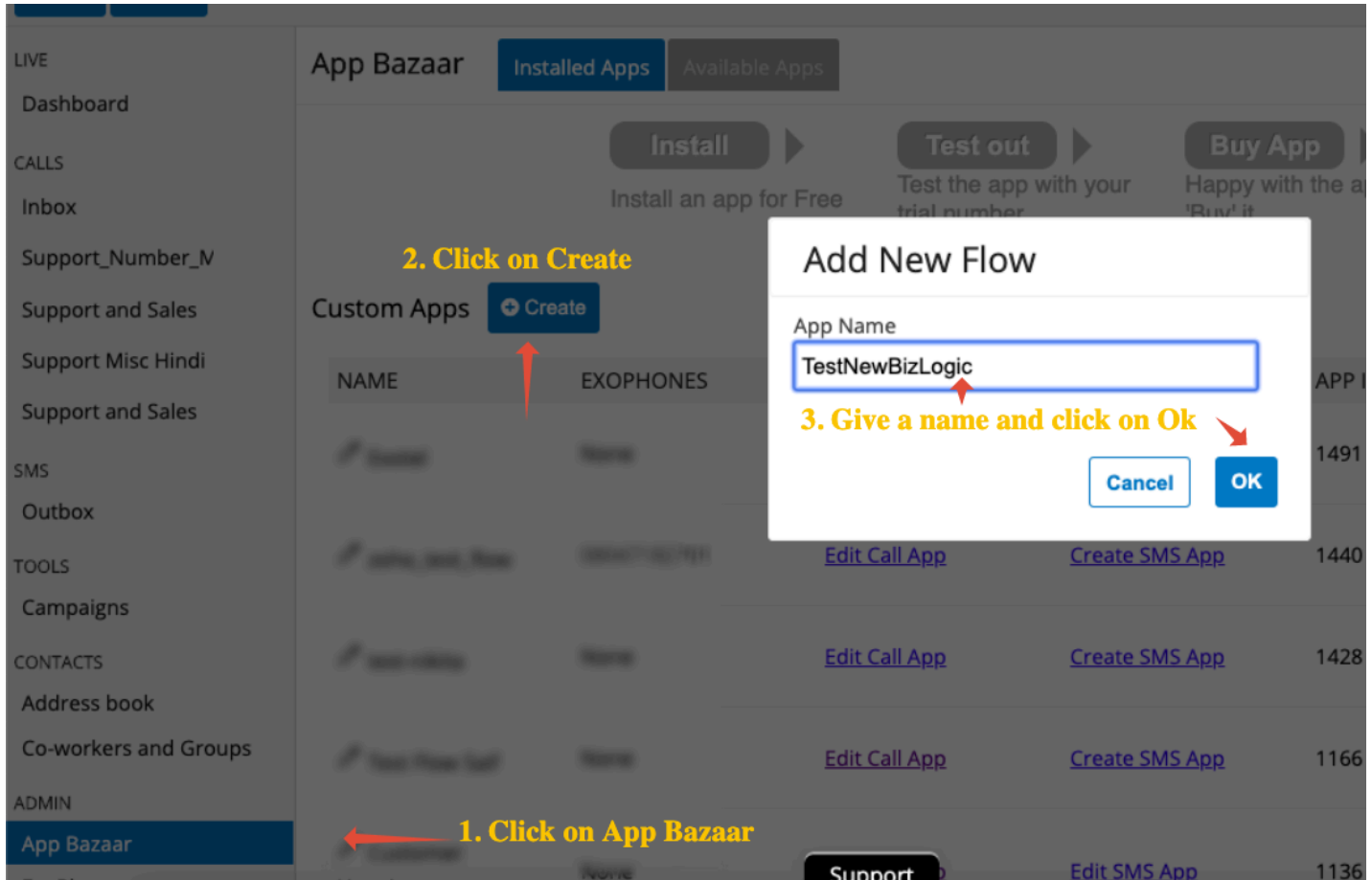


3. Add the phone number of the person who will test the new business logic by using **Add contact**.

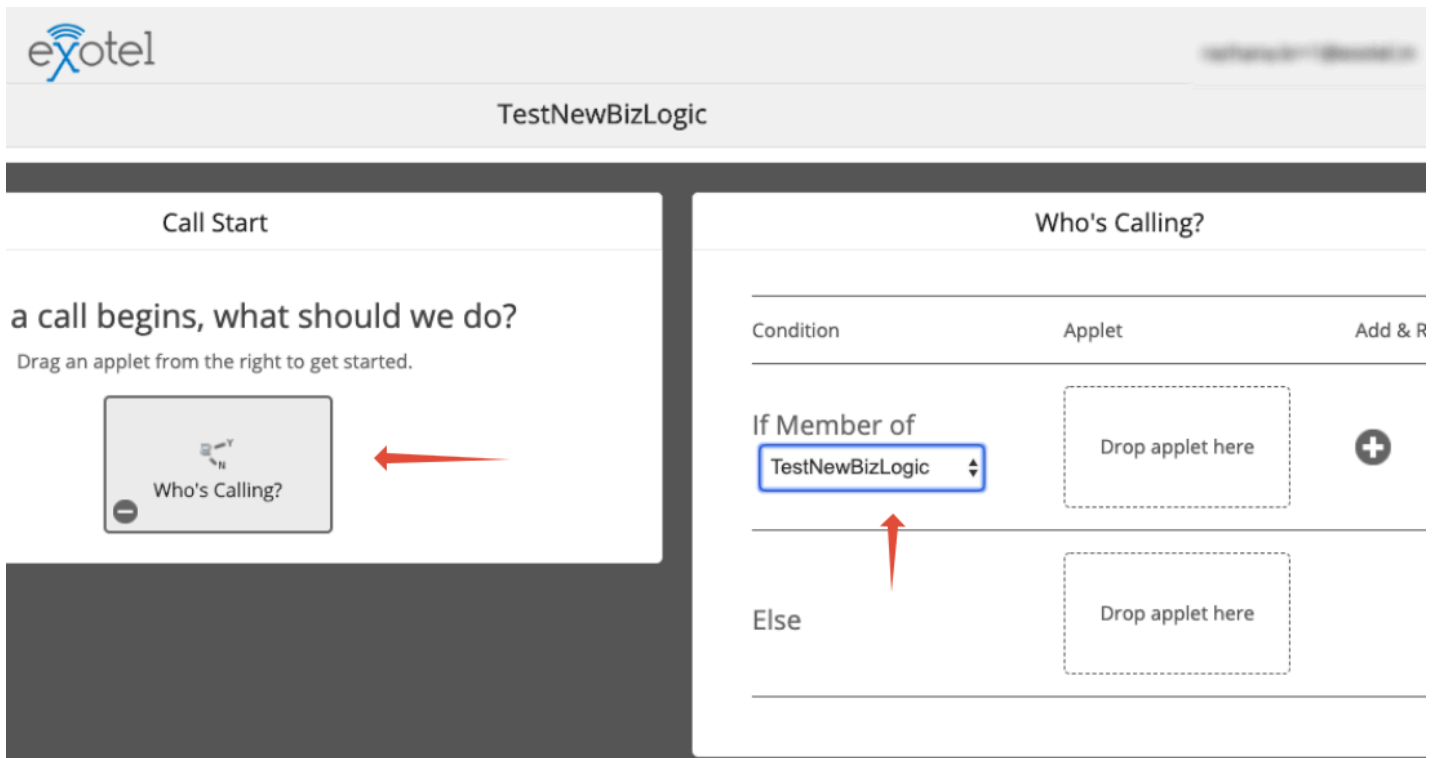


Set up the test call flow

1. Go to your app page (<http://my.exotel.in/flows>) and create a new app. Call it "TestNewBizLogic".



2. Start with the **Who's Calling** applet and choose the "TestNewBizLogic" list.



3. If the caller is from the "TestNewBizLogic" list, use the **Transfer** applet to connect to the new business logic that you wish to test.

The screenshot shows the 'TestNewBizLogic' flow configuration. On the left, the 'Who's Calling?' section has a condition 'If Member of TestNewBizLogic' and an applet 'Transfer'. A red arrow points to the 'Transfer' applet. On the right, the 'Transfer' section shows a 'Redirect to' dropdown set to 'NewBizLogic'.

4. If the caller does not belong to the "TestNewBizLogic" list, use the **Transfer** applet to connect to your old business logic.

The screenshot shows the 'TestNewBizLogic' flow configuration. On the left, the 'Who's Calling?' section has a condition 'If Member of TestNewBizLogic' and an applet 'Transfer'. A red arrow points to the 'Transfer' applet. On the right, the 'Transfer' section shows a 'Redirect to' dropdown set to 'OldBizLogic'.

Assign a number and test

1. Go to your company numbers (<http://my.exotel.in/numbers>) and assign the number to "TestNewBizLogic". Refer to [this support article](#) on how to attach a number to a call flow.
2. Call the number and check that all is well.
3. After testing, if you wish to use the new business logic, assign the number to the new business logic.

Need help?

If you have any questions or concerns, connect with us using the chat widget on your Exotel dashboard, or WhatsApp us on 08088919888.

4. Getting Started

Exotel's cloud-based phone system enables small and medium businesses to set up a fully functional contact center in minutes. It brings enterprise-level features within reach without the cost or complexity of traditional telephony infrastructure.

With Exotel, you can maintain one customer-facing number, manage unlimited concurrent calls, configure IVRs, define routing rules, get missed call alerts, and access detailed analytics – all from an easy-to-use web dashboard.

How It Works

1. Sign up for a [Trial Account](#)

Use the provided test credits and virtual numbers to experiment with your configurations before going live.

2. Add Users and Groups

[Add Co-workers/Agents](#) and assign them to [Groups](#).

Groups help organize your co-workers and control how calls are routed to their numbers.

3. Assign a Virtual (Exophone) Number

[Purchase Exophone](#) and link it to your customer-facing number.

The Exophone acts as the virtual number that connects your business line with Exotel's call flow system.

4. Create Call Flows

Create [Call Flows](#) to define routing rules for your Groups.

Build IVR menus, define routing logic, and customize the caller experience.

5. Route Calls to Agents

[Assign Exophone To A Call Flow](#) using the dashboard.

Use automatic call distribution via the [Connect Applet](#) so calls reach the right agent based on your business rules.

[Get Started with a Trial Account](#)

4.1. Create a Trial Account

Exotel trial account has all the features you'd find in a fully paid account which let you evaluate the platform with limited trial credits, a trial phone number for testing your inbound and outbound calls and SMS. The trial account is the best way you can see for yourself what Exotel is all about and how best we can serve your business. Your trial account is loaded with ₹1000 worth of credits which you can use to test the features. The aim of the free credits in your Exotel account is to ensure you are able to test out all of our features before deciding to take the plunge.

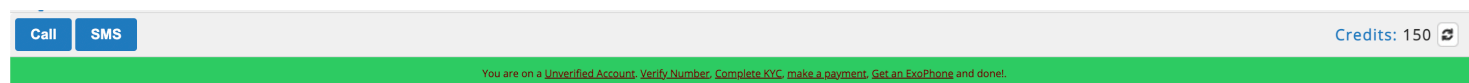
Getting Started

Create a trial account

1. Register using the [Signup](#) page (enter name, company, email, phone and other requested fields).
2. Log in to your trial account by entering your registered Exotel email address and password.
3. Verify your number by giving a missed call to the following numbers 09513885656 or 02249360005. Select the number you used for Signing up.
4. Once your number is verified, open the dashboard to see your **trial credits** and the assigned **trial phone number**.

Trial credits

When you signup for a trial account 1000 credits are automatically added and you will see a banner when you are logged in.



Trial Account banner

Trial Phone Number

Access trial phone number

1. Sign in to the dashboard.
2. Open **Phone Numbers** or **Virtual Numbers**.
3. Note the assigned trial phone number and the account PIN shown next to it.

How to use the PIN

- Whenever you install a new app or change something in your call or SMS flow, you can test it using by connecting or installing it on this number.
- For inbound calls: callers from unverified numbers are prompted to enter the PIN to connect to your mapped flow.
- For SMS-triggered flows: prepend the PIN to the message body, then a space, then the command (example: 9999999999 sales where 9999999999 is the PIN).

Daily rentals continue to be charged from your trial credits as long as the Exophone and co-worker remain active in your account.

What your own number ? Learn more about [Exophone](#)

What can you do with your Trial account?

1. **Make an outbound call:** Call the agent you just added through your Exotel account.
2. **Receive a call:** Call your ExoPhone number from a number that is *not* registered in your Exotel account. The call will land on your registered phone via Exotel.

3. **Send SMS:** send a SMS and test how they work with your setup.

4. **Add another agent:**

Add a co-worker or agent to your account so you can test calls between users.

[Add a Co-worker](#)

Make an outbound call

Testing Without KYC

Before submitting KYC documents, you can test outbound calls within your account. Outbound calls are allowed between **verified users** on your Exotel account.

For example, if you add two users, Divya and Rakhee:

- Both must verify their phone numbers.
- You can log in as Divya and make an outbound call to Rakhee's verified number.

This lets you test the flow without waiting for KYC approval.

Placing an Outbound Call

To make a call through the dashboard:

1. Keep the mobile phone or landline linked to your Exotel account nearby.
2. Click the **Call** button on the top left of the dashboard.
3. Enter the number you want to call and press **Call** again.
4. Exotel will first dial your **registered number**. Answer the call. Exotel will then dial the **destination number**.
5. Once the other person picks up, you can start your conversation.

Using the Call API

You can also initiate outbound calls programmatically using the Exotel Call API.

[View Voice API Documentation](#)

Receive a call

When testing calls in your Exotel trial account, you may be asked to enter a PIN depending on which number you are calling from.

- If you call the **Trial Phone Number** from your **registered phone number** or from any number that belongs to a Verified user in your account, you will not be prompted for a PIN. Exotel recognizes you automatically based on your caller ID.
- If you call from an **unregistered number** (for example, a friend's phone), you will be prompted to enter the PIN. The PIN is the registered phone number associated with your account.

Send SMS

You can send SMS directly from your Exotel account during the trial period. This helps you test the feature and understand how messages are sent and delivered.

Testing SMS on Indian Numbers

As per TRAI regulations:

- Testing SMS to Indian numbers is limited to the **default template**.
- Testing is supported **only through the API**, not the dashboard.

Refer to the full API details here: [Exotel SMS API](#)

Trial Account vs Full Account

While you sign up for an Exotel account, you will get a trial account version. This gets upgraded to a full-paid account when you make the first payment to your account.

What are the features that are available in the full account, but not in the trial account?

The trial account is as good as your full account but the trial account has certain limitations like you can sign up for 15 days and you will get 1000 credits to use and explore our services, SMS can be tested via the API using the default template only (custom templates aren't available on trial) and you can keep using it as long as your Exotel credits last. The rationale for this is, that when you onboarded as a full-paid account, we would like you to experience Exotel completely before you can take an informed decision. This saves time for you as well as for us.

ExoPhone		
Search ExoPhone, e.g. 08088919888		
Assign ExoPhones to Flow		
New ExoPhone		
EXOPHONE	TYPE	INSTALLED APP
095-138-86363 Pin: 7975-2451-38	Not set	

There is a sandbox number that cannot be used once your trial account is converted to a full paid account.

Differences at a glance

Here is a summary of how your trial account compares with a full account:

Area	Trial account	Full account
Validity and credits	You can sign up for 15 days and you will get 1000 credits to use and explore our services. You can keep using it as long as your Exotel credits last.	Your account gets upgraded to a full-paid account when you make the first payment.
SMS APIs	SMS can be tested via the API only (not the dashboard), limited to the default template – see the Send SMS section above.	SMS APIs are available.
SMS templates	You can't customize the templates.	You can customize templates.
Sandbox number	A sandbox number is available for testing.	The sandbox number cannot be used once your trial account is converted to a full paid account.
Service and product notifications	We will not be able to communicate any service disruptions or downtime notifications, or any updates to API, product features, Apps, etc.	You receive these notifications and updates.

Extending Your Trial

If you need more time to explore Exotel, you can request an extension of your trial period. This is useful if you want to test a specific use case or feature before upgrading to a paid plan.

To request an extension:

- Click the **Support** button at the bottom of the dashboard, **or**
- Contact your account manager directly.

What's Next?

--> [Add a Co-worker](#)

--> [Using APIs](#)

--> [Integrations](#)

--> [Contact Us](#)

4.2. Add a Co-worker

To add a co-worker to your Exotel account:

1. **Log in** to your Exotel account.
2. Click **Co-workers & Groups** on the left panel.
3. Click **Invite Co-workers** on the top-right corner.

The screenshot displays the Exotel Business Phone System interface. On the left sidebar, the 'Co-workers and Groups' option is highlighted with a red arrow labeled '1'. The main content area is titled 'Co-workers and Groups' and features a 'My co-workers' section with a grid of user cards. A red arrow labeled '2' points to the 'Groups' section on the right, which lists groups such as 'Support, Reception, Office' and 'Support, Reception, Office' with their respective shortcodes (642 and 643). The top right of the interface shows buttons for 'Invite co-workers' and 'Add Group'.

Set Access Permissions

Choose the appropriate access level for each co-worker:

- **User**
- **Supervisor**
- **Admin**

For details on access rights, refer to the related article on [User Roles and Permissions](#).

Verify the Co-worker's Number

After adding a co-worker, they must verify their registered phone number to make and receive calls on Exotel.

To verify:

1. Ask the agent to **give a missed call** from their registered phone to the number shown in the note.
2. Once verified, the co-worker can start using Exotel for calls.

Password Generation

A **generate password** link is automatically sent to the co-worker's registered email address.

Example:

If the original email ID is `xyz@sjshsj.in` and an alias is `xyz+1@sjshsj.in`, the password link will be sent to the **original** address.

Co-worker Limit

The default maximum number of co-workers allowed per account is **50**.

To add more, please contact the Exotel Support team.

4.3. Using APIs

To use Exotel APIs, you need to authenticate with your **API Key**, **API Token**, and **Account SID**. These credentials, along with the correct subdomain, are required for all API requests.

Where to Find Your Credentials

- Log in to your Exotel account.
- Go to the **API Settings** page.
- Copy your **API Key**, **API Token**, and **Account SID**.

Example

```
curl -u <your_api_key>:<your_api_token> \
https://<subdomain>/v1/Accounts/<your_sid>/Calls/connect
```

[API Documentation](#)

Need help troubleshooting APIs?

[API FAQs](#)

4.4. Integrations

Exotel integrates seamlessly with leading CRMs, helpdesk tools, marketing platforms, SMS services, and SDKs – allowing you to embed voice, messaging, and call features directly into your existing workflows.

Category	What You Can Do	Sample Integrations
CRM & Helpdesk	Sync call logs, automagically raise tickets, see caller info, and drive contextual workflows	Zoho Desk, Zoho CRM, Freshdesk, HubSpot, Salesforce
Marketing & SMS	Trigger SMS / WhatsApp campaigns, connect with engagement tools, and centralize message flows	CleverTap, WebEngage, MoEngage
E-commerce & Verification	Automate OTPs, order confirmations, and customer verification calls	Shopify Verification
SDKs & Voice Channels	Embed voice calling capabilities into custom apps or websites	WebRTC SDK, IP-PSTN interconnect

Why Use Integrations?

- **Single source of truth:** All your call, SMS, and call metadata flows into your core systems.
- **Automated workflows:** Trigger actions (tickets, alerts, updates) automatically based on call events.
- **Better context & insights:** Agents and marketers see unified customer history and communication data.
- **Less duplication:** Avoid manual exports, imports or bridging disparate systems.

Explore Connectors

Need help choosing the right integration? Reach out to our support team via Dashboard chat or WhatsApp at **08088919888** – we'll help you pick and get started.

4.5. Onboarding

Please follow the steps below to go live with calling and messaging to your customers using Exohones.

Step 1: KYC Verification

1. Please refer to the 'KYC Docs' option - left-hand side, under 'MY ACCOUNT' and upload the KYC. Please refer to the list of documents needed in [KYC Verification](#), based on your company entity

exotel

CALL SMS TRANSFER API Credentials

ON Credits: 356

Telecom regulations in India obligate us to keep your KYC documents. [Learn More](#) about what documents you can submit. Make sure flash is installed and popups are not blocked

Your Account's KYC Status: **Completed**

DOCUMENT TYPE	FILE	STATUS	UPLOAD
Company PAN Card:	Not Submitted		Click to upload file (Max 10MB)
Certificate of Incorporation:	Not Submitted		Click to upload file (Max 10MB)
Company Address Proof:	Not Submitted		Click to upload file (Max 10MB)
Your Passport Size Photo:	Not Submitted		Click to upload file (Max 10MB)

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2. Fill in the [Company Info](#) page -

1. Please fill in all the billing & GST details
2. At the end of the page, you can see an option called per call value.

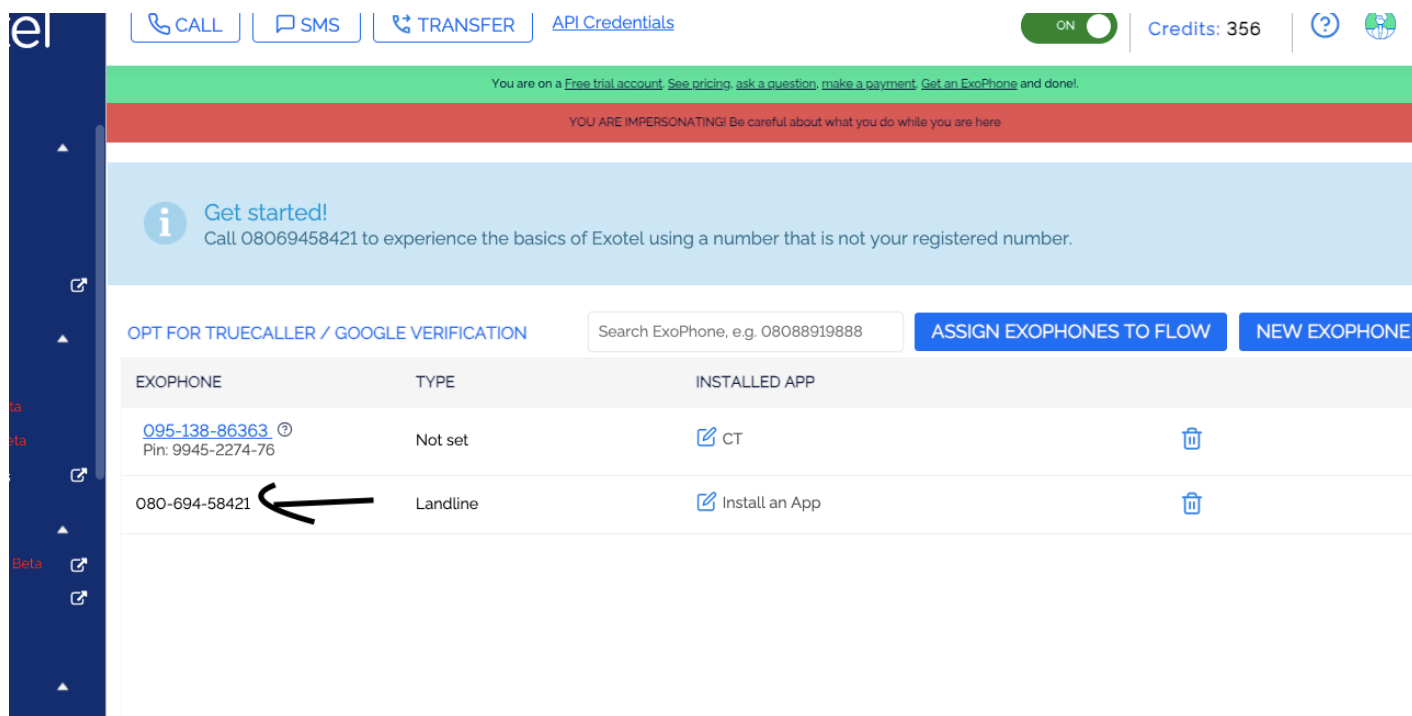
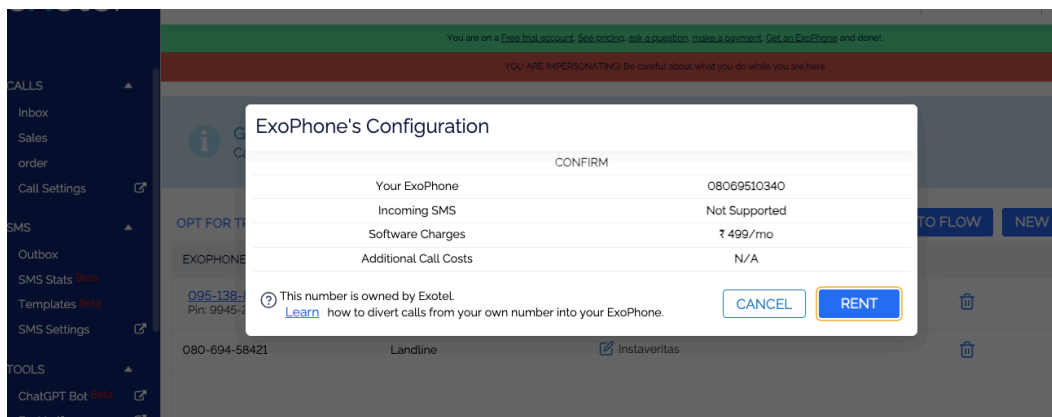
Per call value: It is just a hypothetical value by default, as 500 - This is the value of a missed call for your organisation.

Step 2: Purchase Exophone

Please go to Exophones under the Manage option and check if a virtual number is assigned/allocated to your account. This is separate from the sandbox number(095-), which is common for every trial account. Please do not use the 09513885656 number for calling as it requires a PIN to connect.

- If in case the virtual number is not assigned, click on 'NEW EXOPHONE' option -> Click on Change -> Select Region -> Select Exophone -> Next -> Rent -> Select the flow-> Assign App(This can be default 'landing flow')
- KYC approval is needed to get the Virtual Number assigned.
- Please write to Exotel hello@exotel.com if the KYC is not approved within 24 working hours or facing issues getting a Virtual number.

For more information See [Purchase Exophone](#)



DND Numbers

Exotel does not allow cold calling. Promotional calls can be made to registered phone numbers using a 140 series number. For 140 series number, The DLT registration number is mandatory

For transactional calling, the available numbers are landline and mobile DIDs, which can only be used to call registered or inquired customers. Customer data must be maintained in a CRM or LMS.

For transactional calls to DND numbers, we can enable this feature only after the following DND agreement is signed and sealed by the customer.

DND Opt-in Documentation and Required Details:

Website Terms & Conditions

Please include the below statement in your website's Terms & Conditions (optional):

"I agree and consent to receive all communications at the mobile number provided, even if this number is registered under the DND/NCPR list under TRAI regulations. For this purpose, I further authorize the Company to share/disclose the information to any third-party service provider, affiliates, group companies, their authorized agents, or third-party service providers."

Letterhead Declaration

On your official letterhead (sample attached below), please mention:

"(Company Name), also known as (account sid which is available in API credentials section of Exotel dashboard), is using Exotel to make transactional calls to its registered users only. In case of any violation, (Company Name) will provide the opt-in proof within 24 hours. If the proof is not provided within 24 hours, Exotel reserves the right to disconnect the connections immediately without prior notice. (Company Name) agrees to the terms of service mentioned here: <https://exotel.com/terms-of-service-2018/>."

Lead Proof

Please share a screenshot of the lead from your CRM, with the URL and timestamp visible

Learn more here: [Enable DND Calling](#)

Types of Numbers Available in the Exotel Platform:

1. **140 Series Numbers** – For promotional calling to registered numbers (non-DND). DLT is mandatory. The costing will be different for these numbers, Please reach out to hello@exotel.com
2. **Landline DIDs** – For transactional calling.
3. **Mobile DIDs** – For transactional calling.
4. **Toll free numbers and Mobile Virtual numbers** – Available only for inbound calls.
5. **Toll Free** – International calls will not work

Note: International calling would work in Virtual landline numbers, please reach out to Exotel support for enabling the same. hello@exotel.com

4.6. Contact Us

If you have any questions or need assistance, our support team is here to help.

You can reach us through:

- **Chat:** Use the chat widget available on your [Exotel Dashboard](#).
- **WhatsApp:** Message us on **08088919888** for quick support.
- **Email:** email us at **hello@exotel.com**

We're available to assist you with any product, billing, or account-related queries.

4.7. Use Cases

4.7.1. E-commerce Businesses

E-commerce is a virtual marketplace where **building customer trust** is critical.

Communication plays a key role in shaping this trust – and **cloud communication** has become a major differentiator for fast-scaling online businesses.

Exotel's cloud telephony solutions make it easy for e-commerce companies to manage customer interactions, automate responses, and improve operational efficiency.

Common Use Cases for E-commerce

- **Timely response to queries and complaints**
- **Automated feedback systems** for customer satisfaction
- **Personalized customer experience** through custom IVR flows
- **Scalable communication infrastructure** that grows with the business
- **Bulk call and SMS campaigns** for promotions and updates
- **Number masking** for customer and agent privacy

Each of these is explained below.

1. Timely Response to Queries and Complaints

Quality of service has become a key success factor for any online business.

With **intelligent call routing and transfer** features on the Exotel platform, no customer call goes unanswered.

If one executive is unavailable, the system automatically routes the call to the next available agent – eliminating missed calls that were common with traditional PBX or SIM-based setups.

2. Automated Feedback System

In a highly competitive marketplace, understanding customer expectations is crucial.

Using Exotel's **cloud call automation**, you can schedule **bulk IVR calls** to collect customer feedback and ratings automatically after delivery or service completion.

This helps build a feedback loop without requiring manual follow-ups.

3. Personalized Customer Experience with Custom IVR

The **Exotel Dashboard** allows you to design customized IVR call flows with an easy **drag-and-drop interface**.

You can guide customers to the correct department – such as Sales, Support, or Returns – ensuring faster query resolution and a better overall experience.

4. Scalable Communication Infrastructure

Business growth can happen anytime, and your communication system should scale instantly to match it.

With Exotel's **cloud-based architecture**, you can:

- Add new customer-facing numbers
- Add or remove agents
- Modify call flows – all directly from the dashboard, without any hardware setup

This flexibility ensures seamless scalability as your business expands.

5. Bulk Call and SMS Campaigns

To improve outreach and run promotions efficiently, Exotel enables you to **schedule bulk call and SMS campaigns** targeted at specific customer segments.

You can:

- Send promotional offers or transactional updates
- Track campaign responses and engagement metrics
- Personalize messages for different audiences

6. Number Masking for Data Privacy

Call masking (or **number masking**) is an advanced data privacy measure that hides personal phone numbers of both customers and agents.

For e-commerce businesses – especially those with delivery fleets – this ensures:

- Agents and customers can communicate safely
- No personal number exposure
- Full compliance with data privacy regulations

This protects sensitive customer information and prevents misuse of personal contact details.

By integrating Exotel's **cloud telephony solutions**, e-commerce businesses can build customer trust, automate communication, and scale efficiently – all while maintaining the highest standards of privacy and reliability.

4.7.2. C.O.D. Verification

What is C.O.D. Verification?

Cash on Delivery (COD) has been a major growth driver for the e-commerce industry. However, it also introduces operational risks such as cancellations, fake orders, and failed deliveries.

Reducing COD-related losses is therefore a key focus area for most e-commerce businesses.

With **Exotel's automated COD verification**, you can confirm the legitimacy of COD orders before dispatch – reducing failed deliveries and optimizing operational costs.

Advantages

- **Reduce No-shows**

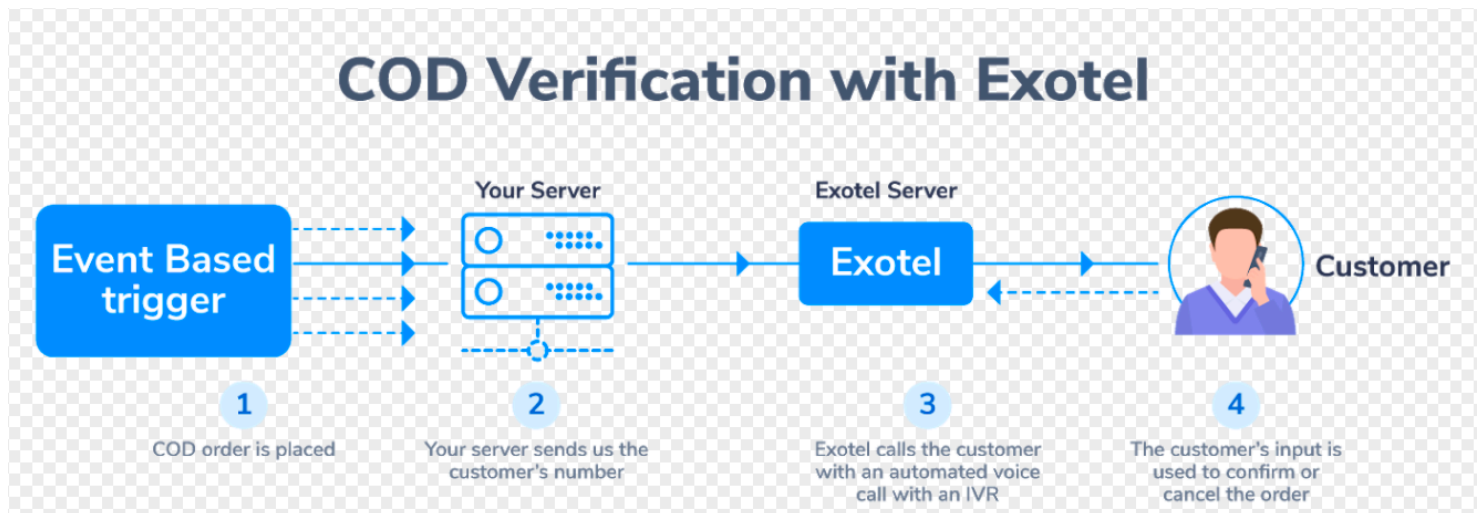
An automated call is triggered to the customer before delivery to confirm their availability and willingness to receive the order.

- **Avoid First Attempt Failures**

On the day of delivery, an automated IVR call checks whether the customer is available.

Customers can confirm or reschedule deliveries via keypad input.

The input is relayed to your CRM or backend system in real time.



Implementation Steps

1. Automated Call Trigger on COD Order

When a COD order is placed, your system can trigger an automated verification call to confirm the order and customer number.

2. Send Details to Exotel

Your server sends the **customer number** and **call flow** details to Exotel via API.

3. Exotel Initiates the Call

Exotel automatically calls the customer with a pre-defined IVR flow to confirm the order.

4. Capture Customer Input

Based on customer input (e.g., *Press 1 to confirm, Press 2 to cancel*), your CRM can mark the order status as verified, canceled, or pending.

API Implementation

Exotel API to Connect a Call to a Flow

```
https://<your_api_key>:<your_api_token>@<subdomain>/v1/Accounts/<your_sid>/Calls/connect
```

This API first calls the From number, and once the recipient answers, connects them to the call flow (applet) you've created in the system – for example, a landing app with IVR or greeting logic.
An HTTP POST request is made to the above endpoint.

- Replace `<your_api_key>` and `<your_api_token>` with the API key and token created by you.
 - Replace `<your_sid>` with your "Account sid"
 - Replace `<subdomain>` with the region of your account
`<subdomain>` of Singapore cluster is `@api.exotel.com`
`<subdomain>` of Mumbai cluster is `@api.in.exotel.com`
- `<your_api_key>` , `<your_api_token>` and `<your_sid>` are available in the API settings page of your [Exotel Dashboard](#)

API Credentials

Navigate to **API Settings** in your Exotel Dashboard and retrieve:

1. **Account SID**
2. **API Token**
3. **API Key**

For details, see:
How to find my API Key, API Token, Account SID, and Subdomain?

Account sid: testcompany10

API Credentials

Create API Key

API KEY NAME	CREATED ON	CREATED BY	API KEY (USERNAME)	API TOKEN (PASSWORD)	ACTION
	04-07-2018		testcompany10	*****	  

Mandatory Parameters

Parameter Name	Mandatory/Optional	Value
From	Mandatory	The phone number that will be called first. Preferably in E.164 format . If not set, our system will try to match it with a country and make a call. If landline number, prefix it with STD code; Ex: 0XXXXXX2400
CallerId	Mandatory	This is your ExoPhone (pick one from here)
Url	Mandatory	http://my.exotel.com/{your_sid}/exoml/start_voice/{app_id} where app_id is the identifier of the flow (or applet) that you want to connect to once the From number picks up the call. You can get the app_id from your Exotel Dashboard

Detailed documentation for all parameters is available here:

<https://developer.exotel.com/api#call-customer>

The call flow referenced in the API must be created in your Exotel Dashboard: <https://my.exotel.com>

Sample Call Flow

1. Go to **App Bazaar** → **Create Flow** → **Enter Flow Name**
2. Use the following applets in sequence:

Applets to Use

- **Gather** – captures customer keypad input
- **Passthru** – sends input data to your server via webhook
- **Hangup** – ends the call gracefully

Steps:

1. Drag and drop the **Gather Applet** – digits entered will be recorded and stored.
2. Drag and drop the **Passthru Applet** – link it to your webhook URL.
3. Add the **Hangup Applet** at the end of the flow.
4. Save the flow.



Assign an **Exophone** to the newly created flow:

Information Pass Through

When the call reaches this menu, Pass info through to this url:
Use this applet to send info to your CRM or Support software. [Learn more](#)

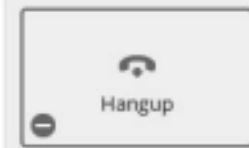
https://script.google.com/macros/s/AKfycbzq0oMKixU5JsXiwbH1KSLoX_WqPNAblo3

Options

Make Passthru Async



In response



Implementing COD Verification with Google Sheets

To simplify data collection, you can integrate Exotel with Google Sheets using a simple Apps Script.

Steps

1. Open a new **Google Sheet**.
2. In **Script Editor**, paste the following code.
3. Deploy the script as a **web app** and copy the **web app URL**.
4. Use this URL as the **Passthru webhook** in your Exotel flow.

Sample JavaScript Code

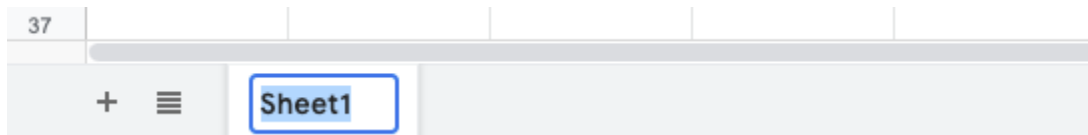
```
// Spreadsheet configuration
var ID = "1M2-MShDX8pIvJlwtPwTvDCPnDSTQw_OfNuI6fODIyIk"; // Sheet ID
var SHEET_NAME = "Sheet1";

// Append data to sheet
function doGet(e) {
  var params = JSON.stringify(e.parameters);
  var jsonMapping = JSON.parse(params);
  var sheet = SpreadsheetApp.openById(ID).getSheetByName(SHEET_NAME);
  sheet.appendRow([jsonMapping["From"][0], jsonMapping["digits"][0]]);
  return ContentService.createTextOutput(e.parameters);
}
```

https://docs.google.com/spreadsheets/d/1M2-MShDX8pIvJlwtPwTvDCPnDSTQw_OfNuI6fODIyIk/edit#gid=0

Replace:

- ID → the **Sheet ID** from the Google Sheets URL
- SHEET_NAME → the name of the sheet where you want to store data



Deploy the Script

When deploying:

- **Project Version:** Enter a version name
- **Execute as:** *Me (your email)*
- **Who has access:** *Anyone, even anonymous*
- Click **Deploy** to get your **web app URL**

Use this webhook URL in the **Passthru Applet** in your Exotel call flow.

5. Cloud Telephony

5.1 Overview

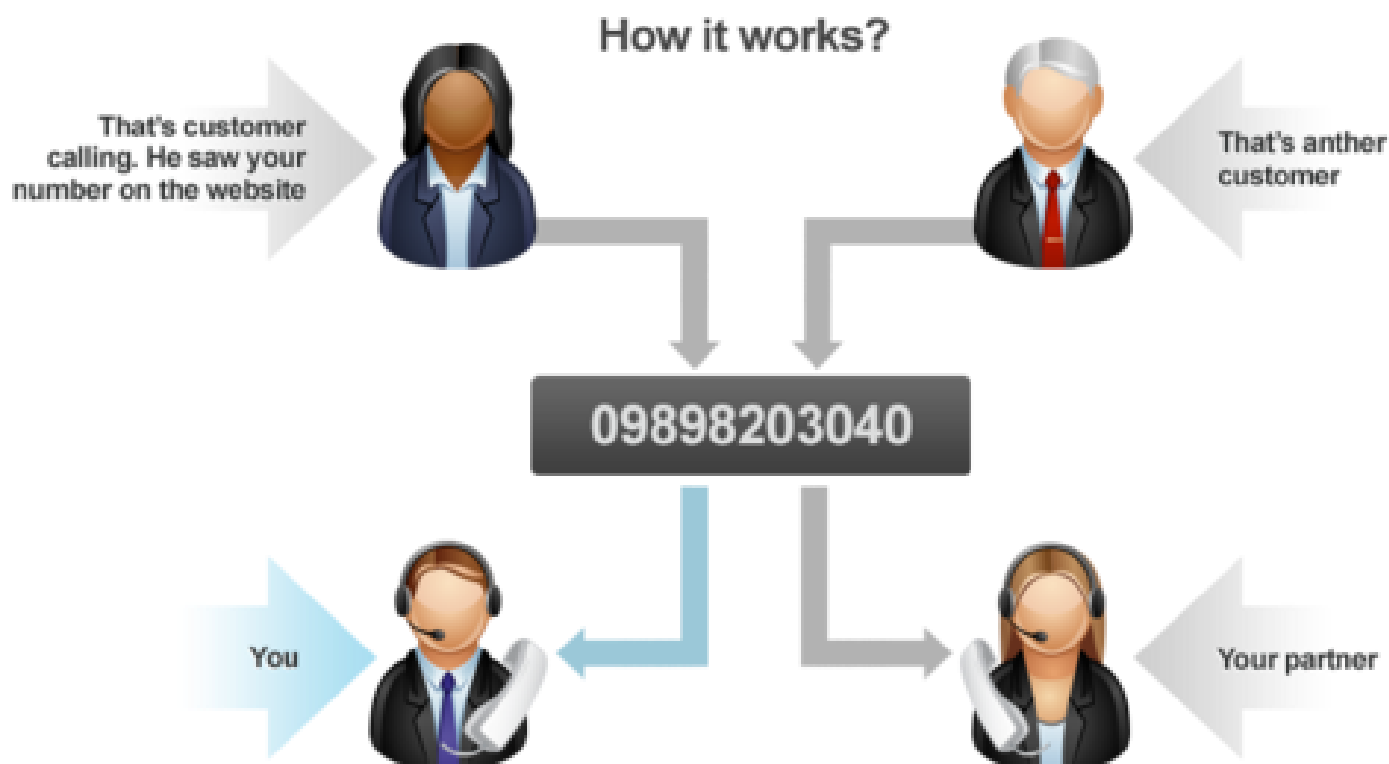
Cloud telephony, also known as cloud calling, is a type of *Unified Communications as a Service (UCaaS)* that enables businesses to manage voice communications over the internet.

In traditional telephony setups—whether **VoIP-based** or **PRI/PSTN-based PBX systems**—the initial capital expenditure for hardware and infrastructure is significant.

Cloud telephony eliminates this by moving all telephony operations to the cloud.

With cloud telephony, users can place and receive calls directly from any computer or mobile device with an internet connection. Businesses no longer need to purchase or maintain standalone hardware such as PBX boxes.

Example Setup



How It Differs from Skype or Similar Services

Skype, Viber, and similar applications are **peer-to-peer (P2P)** VoIP communication tools, typically used for **computer-to-computer** calls.

Key differences include:

- Skype requires both parties to be using the Skype application.

- Calls cannot originate from or terminate to regular phone numbers.
- Skype and similar tools are primarily designed for **personal use**, not for managing or routing **business calls**.

From a business standpoint, such applications are **not suited for handling customer communications**, as they lack the scalability, routing logic, and integration options offered by cloud telephony systems.



5.2. Infrastructure and Capacity Management

Exotel's cloud infrastructure is designed to scale seamlessly with customer demand.

We continuously monitor and upgrade our capacity as part of daily operations to ensure reliable performance at all times.

A dedicated infrastructure team is responsible for **capacity planning and load estimation**, including anticipated spikes during high-traffic periods such as festivals or seasonal events.

This proactive approach ensures that our customers experience uninterrupted service without the need to manage infrastructure themselves.

Exotel provides **24/7 support** to all customers, ensuring that your communication systems remain stable, responsive, and fully operational.

5.3. Exotel’s Sub-Processor

Effective as of: 21 January 2025

Exotel engages the following sub-processors to support infrastructure, communication, and service delivery operations.

Category	Sub-Processors
Data Centre Providers	CTRLS, TCL, Nextra, Netmagic
SMS Providers	Jio, Airtel, BSNL, Tata
Telephony Providers	Jio, Airtel, Vodafone Idea, Tata Teleservices, Reliance Communication

6. Exophone

6.1. Purchase Exophone

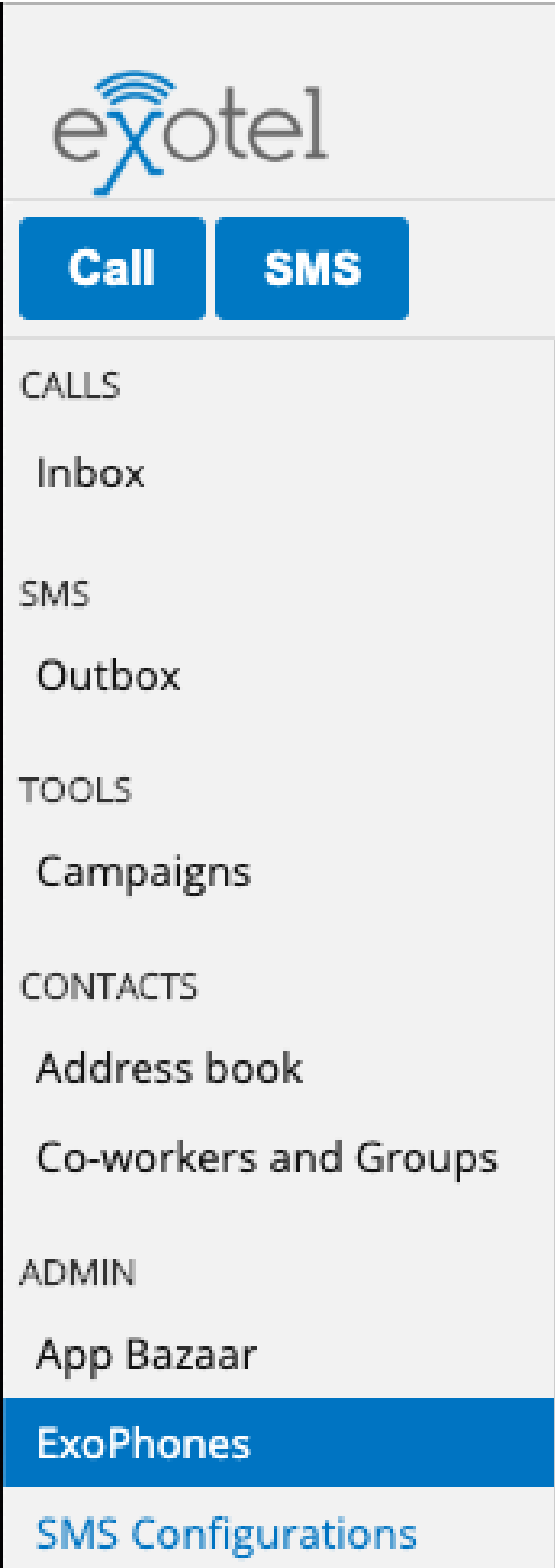
To set up your Exotel Account, the first step is to get an ExoPhone; given below is the 4 step process to acquire one (remember you would need ₹ 500 or more in your account to get an ExoPhone) You can also check your Exophone charges from your Bill plan <https://my.exotel.com/billing>

Exotel strongly advises against using or advertising **ExoPhones** as customer-facing numbers.

This is because Exotel does not own these phone numbers. They are leased from telecom operators and are subject to change based on regulatory or operational requirements.

Learn more here: [Using Existing Phone Number](#)

Step 1: Click on the ExoPhones tab in your Exotel Account



Step 2: Click on New ExoPhone button

ExoPhone

Search ExoPhone, e.g. 08088919888

Assign ExoPhones to Flow

New ExoPhone

EXOPHONE	TYPE	INSTALLED APP
095-138-86363	Not set	Uninstall ExoPhone

Step 3: Select your region and choose the ExoPhone

ExoPhone's Configuration

Your ExoPhone
Change
SmsSenderId

08847132486	08847132487	08847132488	08847132489	08847132490
08847132491	08847132492	08847132493	08847132494	08847132495
08847132496	08847132497	08847132498	08847132499	08847132500

Show more...

i Please select your ExoPhone.

i We currently allow 5 ExoPhones to be added per day for your account. Please reach out to hello@exotel.in if you would like to increase the limit

Cancel
Next

Step 4: Click on Rent and then assign the desired call flow

ExoPhone's Configuration

CONFIRM

Your ExoPhone	08847132487
Incoming SMS	Not Supported
Software Charges	₹ 4000/mo
Additional Call Costs	N/A

i This number is owned by Exotel. [Learn](#) how to divert calls from your own number into your ExoPhone.

Cancel
Rent

And you are set to go

We currently allow 5 ExoPhones to be added per day to your account. Please reach out to hello@exotel.in if you would like to increase the limit.

Follow DLT guidelines for your Sender ID/Templates. Leave it blank, if you don't intend to use SMS.

For IP-PSTN intermix, you can purchase ExoPhones only from regions where you have completed your KYC in. Please refer [Exotel's VoIP Softphone](#)

6.2. Delete Exophone

Before we get started, there are a couple of important points that we need to remember here:

1. Do not delete all the ExoPhones at once.
2. Please keep in mind that if you delete your ExoPhone, you will lose it forever and it will be available for others to purchase.
3. ExoPhones are now billed monthly and the rentals are charged on the 1st of every month.

You can delete an ExoPhone from the dashboard as well as using our API. The steps to delete an ExoPhone from the dashboard are highlighted below:

- 1) Click on '**ExoPhones**' on the left panel.

ADMIN

App Bazaar

ExoPhones

SMS Configurations

Access Control

Co-worker Activity Log

Analytics

2) Click on the "**Delete**" icon corresponding to the number that needs to be deleted.

MESS			
Support			
MAIN LAB	0951 36 861 861 Phone: 02 881 1 080 76 000	Not set	Phone / WhatsApp / Telegram / Email 
Mulund	022 4880 1011 00	Landline	Billing / Production group / Email 
SMS	022 4880 102 000	Landline	Forward to / Email 
Outbox	022 4880 102 000	Landline	Forward to / Email 
TOOLS			
Campaigns	022 4880 102 750	Landline	Forward to / Email 
CampaignsNew	022 4880 102 751	Landline	Logistics 
CONTACTS	022 4880 102 752	Landline	Android / WhatsApp / Email 
Address book	022 4880 108 000	Landline	Production / Email 
Co-workers and Groups	022 4880 108 000	Landline	Billing / Email 
ADMIN			
App Bazaar	022 4880 108 000	Landline	Forward to / Email 
ExoPhones	022 4880 752 100	Landline	Campaigns 
SMS Configurations	0800 071 118 001	Landline	Phone / Email / Production / Email 
Access Control			
Co-worker Activity Log			

6.3. Available Regions And Circles

International

Currently, Exotel is available in **20 countries** across the globe. In the main menu on your left Find **Virtual Numbers** tab-> **New Virtual Number**->**Change** The list of available countries is shown

Virtual Number's Configuration

Your Virtual Number **Change**

Software charges for you

Select your region

- United Arab Emirates
- Australia
- Canada
- Czech Republic
- United Kingdom
- Hong Kong
- Hungary
- Indonesia
- Sri Lanka
- Malaysia
- Norway
- Philippines
- Romania
- Saudi Arabia
- Singapore
- Thailand
- United States of America
- Vietnam
- South Africa
- India

Cancel **Next**

India

In India, Exotel is available in **11 telecom circles**. In the main menu on your left find **Exophones** tab -> **New Exophone** -> **Change**, you can see the circles they belong to.

ExoPhone's Configuration

Your ExoPhone **Change** **Click on change to view the available regions**

SmsSenderId **Upper-case only** ☒

Software charges for you

We currently allow 5 ExoP out to hello@exotel.in if you

Follow [DLT guidelines](#) for intend to use SMS.

Select your region

- Andhra Pradesh
- Delhi
- Gujarat
- Karnataka
- Kerala
- Maharashtra
- Madhya Pradesh
- Mumbai
- Rajasthan
- Tamilnadu
- West Bengal

Cancel **Next**

Once a number is selected, you can procure the number by Clicking the Rent option and assigning the number to a call flow.

Exotel is not available in my circle. What can I do?

Please first check to see whether any Exophones are accessible in your circle [Exophones available in your circle](#).

If it isn't, you can select to receive a number that is located nearest to your area—for example, if you're from Jaipur, you could get a Delhi-based number—and use it straight immediately.

However, doing so will result in higher STD fees for your calls and diverts.

To contact us with any inquiries, please reach out for the below details.

6.4. Using Existing Phone Number

We advise none of our clients to use or advertise ExoPhones as their customer-facing numbers. The fact that Exotel does not own these numbers is the cause.

Instead, the ownership belongs to our operators. If the operators decide to discontinue the number, your clients would have trouble contacting you. If you have your own CFN, the procedure will go smoothly, and if the current number has a problem, you may easily decide to turn on call forwarding on a different ExoPhone.

Please choose an operator that provides:

- 1. No Call Forwarding tone:-** Make sure you can't hear the "Please wait your call has been forwarded" tone when a call is forwarded. Only Jio does not currently play this automatically. In other operators, the call forwarding tone is played. For Airtel and Vodafone numbers, we can have this removed.
- 2. Switch level forwarding:-** Call forwarding takes place at the switch level, so that a customer call will reach Exotel immediately, cutting down on call forwarding time.

Additionally, you may also use a mobile virtual number or a toll-free number provided by Exotel as your customer-facing number for incoming calls, as Exotel has full control over these numbers. Therefore, if there is any issue with the MVN or TFN, Exotel can directly coordinate with the operator to resolve it.

In order to use Exotel, we would require you to use your own number with Exotel, and forward calls from your Existing number to your ExoPhone number, which would then route the calls to your agents.

6.4.1. Call Forwarding from Customer facing number to Exophone

If you find any issues activating call forwarding from your customer-facing number to ExoPhone, please check that there are no outstanding balances or billing issues against the customer-facing number.

If the above criteria are satisfied and yet you are unable to activate call forwarding please try the following method:

1. Set Forwarding to a different operator number. There are high chances that this might fail.
2. Then set forwarding back to the original number.

For now, we support removing the call forwarding tone that's played for Airtel and Vodafone CFNs.

Below are the prerequisites from the Airtel operator to remove the call forwarding tone.

1. The Airtel Number should be a postpaid connection.
2. The Number has to be a corporate-owned number. Meaning the Customer Facing number has to be registered on your company name.
3. A sealed and signed copy of the authorization letter on your company letterhead with the complete name of the company is mandatory.
4. Ensure that both your customer-facing number and your ExoPhone number with Exotel are of the same region.

Please note Airtel team has requested to get the enclosed draft from your side on your company's letterhead where you place the request for call forwarding on behalf of our company.

Please note Airtel team has requested to get the enclosed draft from your side on your company's letterhead where you place the request of call forwarding on behalf of our company. This draft needs to be shared on the email (hello@exotel.in). Kindly note it has to be attested with the seal and signature of the authorized signatory. Please bear in mind, this process will be followed only for the first request raised by the company. Any recurring request will be fulfilled by the Airtel service team.

Please note this is applicable for the call forwarding tone removal from Airtel Customer Facing Numbers(CFNs) only. (Not applicable for Vodafone CFNs) Kindly refer to the attached document for the attestation.

Below are the prerequisites from the Vodafone operator to remove the call forwarding tone.

1. The Number has to be a corporate-owned number. Meaning the Customer Facing number has to be registered on your company name.
2. Ensure that both your customer-facing number and your ExoPhone number with Exotel are of the same region.

6.4.2. How to get your own mobile / toll-free number

To protect you from the TRAI 13th amendment, we request you to never publish an ExoPhone on any of your collateral, including, but not limited to the following -

- Website
- Google AdWords
- Visiting cards
- Fliers
- Any offline material
- SMS blasts

All the numbers that you use on any of these media should belong to you. You can do this by:

- Buying a Vodafone mobile number that meets the requirements mentioned in this support article from any Vodafone store.
- Put the SIM in your mobile phone, and set call forwarding to the ExoPhone number in your account and that's it!
- Please ensure that you make an outbound call from the purchased mobile number at least once every 15 days (You need to use the SIM in a phone and place one call). This is a mandatory requirement from Vodafone and non-compliance will result in barring the number.

For more information, please reach out to us and we will be more than happy to assist you.

6.4.3. Why should we have a different Customer Facing Number (CFN)?

We advise none of our clients to use or advertise ExoPhones as their customer-facing numbers. The fact that Exotel does not own these numbers is the cause.

Instead, the ownership belongs to our operators. If the operators decide to discontinue the number, your clients would have trouble contacting you. If you have your own CFN, the procedure will go smoothly, and if the current number has a problem, you may easily decide to turn on call forwarding on a different ExoPhone.

Please choose an operator that provides -

- 1. No Call Forwarding tone:-** Make sure you can't hear the "Please wait your call has been forwarded" tone when a call is forwarded. Only Jio does not currently play this automatically. In other operators, the call forwarding tone is played. For Airtel and Vodafone numbers, we can have this removed.
- 2. Switch level forwarding:-** Call forwarding takes place at the switch level, so that a customer call will reach Exotel immediately, cutting down on call forwarding time.

Additionally, you may also use a mobile virtual number or a toll-free number provided by Exotel as your customer-facing number for incoming calls, as Exotel has full control over these numbers. Therefore, if there is any issue with the MVN or TFN, Exotel can directly coordinate with the operator to resolve it.

6.5. Ownership of Landline Exophones

All the virtual numbers (ExoPhones) that you may get to use while signing up for an account with us are owned by Exotel.

Landline numbers from your Exotel account are non-transferable.

Given that our infrastructure is built on Primary Rate Interface (https://en.wikipedia.org/wiki/Primary_Rate_Interface) lines provided by the Operator, where a single number is part of 300-500 number pool or 30 channel pool that gets allocated with a single PRI, we would accordingly not be able to facilitate a transfer of ownership for a single Landline number that you may want from your account.

Additionally, as a Cloud Telephony service provider, we are not authorized to resell a specific landline number or any other operator-related component that we may use.

In order to avoid instances that may create conflicts over the ownership of a specific Landline ExoPhone from your Exotel account, we always recommend our clients have a different customer-facing number ([Why should we have a different Customer Facing Number \(CFN\)?](#))

However, if you face issues where your customers don't answer the calls unless they recognize you know more about Truecaller whitelisting, please refer [My ExoPhone on TrueCaller is spammed or saved under a different business.](#)

6.6. Parallel Calls

How many many parallel calls can I

Theoretically, infinite.

We are a cloud provider and so, we tend to have a lot of spare capacity to handle spikes, But please intimate us if you will receive more than 20 concurrent phone calls. We would then just double-check that we have enough spare capacity available to take these calls.

As a general principle, please intimate support before you undertake an advertisement on Radio, TV or Newspaper.

6.7. Can I call numbers outside of India using Exotel?

Does Exotel support calling international numbers?

Yes, Exotel does support international calling. Not by default though. You can request our team to enable the ISD calling services for your account. Please reach out to our team on the below-mentioned contact details if you would like to enable ISD calling services for your account.

6.8. My ExoPhone on TrueCaller is spammed or saved under a different business.

Firstly, we must understand that TrueCaller is an independent entity and Exotel has no control over its business. TrueCaller's users mark the numbers as Spam and they save the numbers as they wish. If you observe the loop, Exotel has no role to play here and as a result, we cannot unspam a number or change the name. However, we offer a solution for this. Please reach out to our Customer Happiness Team or your account manager on the following contact details to know more about this.

6.9. Is my Exotel number transferable to my name?

Unfortunately, no. We do not allow the transfer of ownership of the virtual numbers aka ExoPhones at this point in time.

They are owned by our downstream service providers and they do not like parting ways with their numbers.

However, we can consider transferring the ownership of Mobile Virtual Numbers or Toll-Free Numbers that are currently available in your account after 6 months of being used in your account.

6.10. Why am I getting calls for other companies?

I got a call from another company. The customer told he wanted to connect to a certain number. But the call landed on my company. Looks like some bug. Can you have a look?

This happens once in a while. We have checked these things in the past and it is always because the customer has dialled the wrong number. Next time when you get a call from another company, ask him to look into his display and read out the number he dialled. Almost always, the customer will realize that he typed the wrong number. In other words, just like how you get wrong number calls on your personal phone, you also get them on your company number too.

6.11. Primary Exophone Migration

We at Exotel have decided to move your front-facing numbers to a different service provider considering some of the service disruptions that we faced recently. We are committed to providing you with the best of the service and have to take a hard stance on migrating to a new operator to ensure that we serve you in the best possible manner.

1. What ExoPhones are you referring to?

1. List of ExoPhones present in your account using which you receive incoming calls or make outgoing calls.
2. You should have received an email from "Support from Exotel" on 16th April 2021 from Exotel with the list of ExoPhones along with its corresponding new ExoPhones.
3. In case of uncertainty, please reach out to hello@exotel.in

2. How am I affected?

Incoming calls and outgoing calls on these ExoPhones have now stopped working.

3. What are the next steps?

1. Write to hello@exotel.in to change your existing ExoPhones to alternate ExoPhones reserved by Exotel.
2. For each of your existing ExoPhone, there is already an alternate ExoPhone reserved. With your consent, we would swap the ExoPhone with the alternative ExoPhone reserved.
3. All your call flows will be mapped as per the existing setup. The swapping will enable you to use the new ExoPhone immediately (within 3 days).
4. We shall add the existing ExoPhones as backups to the new ExoPhones and hence customers reaching you on the old ExoPhones would still get through the calls, until the end of March.
5. During this transition, we request you to do all the front-end changes and replace the existing ExoPhones with the corresponding new ExoPhone for display (websites, collaterals, etc.).

Example-

Your ExoPhone: 0123xxxxxxx

Backup associated: 0456xxxxxxx

Post swapping-

Your ExoPhone: 0456xxxxxxx

Backup associated: 0123xxxxxxx

*Post swapping the backup ExoPhones will eventually go down as per the above-mentioned timelines.

4. What are the implications of changing my ExoPhone?

Any logic implemented on the existing ExoPhone should be changed to the new alternate ExoPhone at your end.

- Passthru Applet - Any URL/link where the logic is based on the existing ExoPhone or caller ID parameter, any CRM integration based on the existing ExoPhone.
- Status Callback - Any URL/link where the logic is based on the existing ExoPhone or caller ID parameter.
- SMS Sender ID - Your current SMS Sender ID will be carried forward to the new ExoPhone by Exotel.
- APIs - API logic/call where the ExoPhone or caller ID parameter is used to GET, POST, map, etc needs to be replaced with the alternate new ExoPhone against the existing ExoPhone respectively.
- Review SMS templates and replace content at your end

- SMS templates such as please give a missed call to 080-XXXXXXX
- For inquiries reach us at 080-XXXXXXX, etc, need to be changed at your end.
- Reports changes - Post the migration, you will be able to download ExoPhone-specific reports for the new ExoPhone. If you need the old ExoPhone-specific report, the data will be available in the overall report.
- Caller ID on the handset - For all the outgoing calls, you will see the new caller Id.

5. Will there be any disruption with my current services before or after migration?

Currently, we have added an alternate ExoPhone as a backup to your existing set of ExoPhones. This will ensure outbound calls go through seamlessly via primary or backup ExoPhones. Please note, that the caller Id might be different for outgoing in case the call is routed via backup ExoPhones.

For incoming calls, connectivity issues might continue if users are dialing into your existing ExoPhone considering the quality issues that we are facing with the existing operator. To ensure seamless connectivity for Incoming as well, change your front-facing ExoPhone to the backup ExoPhone and write to hello@exotel.in for migration.

6. Why can't you port the ExoPhones to a different operator instead?

Landline portability is not allowed in India. We have been discussing this with the Department of Telecommunications on this possibility, but this is not in place as of now.

7. What if people call us on the existing ExoPhones?

1. We will be keeping your ExoPhones active till 31st March 2019, and you can start using alternate ExoPhone immediately after making the necessary changes. This will give you some time to migrate your users to new ExoPhones.
2. Meanwhile, you can proactively reach out to your customers via call/SMS campaigns. You could download the list of customers who have reached out to you in the past 6 months via reports and set up campaigns via API or via the dashboard.

8. I do not want to proceed with this replacement, give me other options.

We understand your concern. However, we really do not see us able to provide stable service on your current ExoPhones

Transfer the ownership of these numbers to us.

Landline numbers are owned by operators and we do not have the authority to transfer the ownership of the numbers.

I pay for your service, why should I be affected by your operator relates issues?

Exotel is dependent on service providers/operators for telecom lines and our infrastructure is based on the operator network. We understand that this is inconvenient for you, and while we regret the inconvenience, we do not have other options.

7. Calls

7.1. Browser Calling (WebRTC)

We're excited to introduce Browser Calling (WebRTC) on Exotel's IP Platform (Beta). This feature lets your agents make and receive calls directly from their web browser – without needing a phone – while staying compliant under Exotel's Unified License (UL VNO).

What is Browser Calling?

Browser Calling (WebRTC) allows your agents to handle calls through a softphone widget inside Exotel.

With Browser Calling you can:

- Make and receive calls directly in the browser.
- Use **Mobile Virtual Numbers (MVN, Type: IP-PSTN)** for IP-based calling.
- Toggle between PSTN and IP calling depending on connectivity.
- Enforce KYC for regulatory compliance.
- Maintain business continuity with PSTN fallback.

Benefits at a Glance

- **Simple call widget** – Pop-up for incoming and outgoing calls with accept/reject and hold/mute controls.
- **Switch easily** – Toggle between IP and PSTN calling depending on your network conditions.
- **Full call details** – View on-call statuses, callbacks, and logs after every call.
- **Work anywhere** – Agents can make and receive calls from any internet connection, ideal for remote teams.
- **Stay connected** – Built-in PSTN fallback ensures business continuity.

Enablement & Scope

- Available for SG Stamp and Mumbai Stamp tenants (phased rollout: Hyd, Mumbai, Bangalore, Delhi, Gujarat).
- One MVN per account by default. Additional MVNs require **KYC**.
- **Landline DIDs (Type: PSTN-only)** cannot be used for IP calls.
- Browser Calling can be enabled/disabled at account level from **Exolite Admin** → **Call Settings**.

How to Get Started

Step 1: Enable Browser Calling

- Log in to your **Exotel Dashboard**.
- Go to **Admin** → **Call Settings**.
- Toggle *Enable Browser Calling*.

Step 2: Purchase a Number

- Navigate to [Procure a New ExoPhone](#).
- Select city, number type (**MVN** or **Landline DID**) and role: PSTN-only, IP-only, or IP + PSTN intermix.
- Complete purchase.
- 1st MVN → allocated by default.
- 2nd MVN or more → dashboard prompts for KYC upload. Currently via email to hello@exotel.com.

Step 3: Assign Numbers to Flows

- After purchase, assign the number to an **App Bazaar flow** for inbound calls.
- Define number role: PSTN-only, IP-only, or IP + PSTN intermix.

Step 4: SIP User Creation & Verification

- **New Users:** SIP ID auto-created at signup.
- **Existing Users:** SIP ID created but shown as *Unverified*.
- Reset password at the [VoIP Info Page](#) to activate.
- Admins can check user status (verified/unverified) in the *Co-worker page*.

Step 5: Making Calls

- **Outbound Calls:**
 - If caller ID = **MVN (IP-PSTN)** → supported for IP + PSTN.
 - If caller ID = **Landline DID (PSTN-only)** → call fails with error “*This number type does not support IP calling.*” (or fallback to PSTN if enabled).
- **Inbound Calls:**
 - If MVN assigned → inbound calls can ring on SIP or PSTN.
 - If no MVN → inbound SIP calls fail gracefully and fallback to PSTN.
 - Admins can configure *mandatory PSTN fallback* at group/account level.

Rollback & Deletion

- If you no longer want to use an MVN: [Delete an ExoPhone](#).
- Deleting MVN immediately blocks browser calling (SIP IDs remain visible but inactive).

Voice Softphone

Learn how to use Exotel's browser softphone: [Voice Communication with Exotel's VoIP Softphone \(Beta\)](#).

FAQs

Q. Can I use Landline DIDs for Browser Calling?

A. No, Landline DIDs (Type: PSTN-only) cannot be used for IP calls.

Q. How many MVNs can I buy?

A. One MVN per account by default. More require KYC.

Q. What happens if I delete my MVN?

A. Browser Calling stops immediately. SIP IDs remain but unusable.

Q. Will my SMS/WhatsApp campaigns be affected?

A. No, messaging continues unaffected.

7.2. Outbound Calls

Once you have purchased an **Exophone** in the ExoPhones section, you are ready to make outbound calls. You can also refer to the video attached below this support for video tutorials.

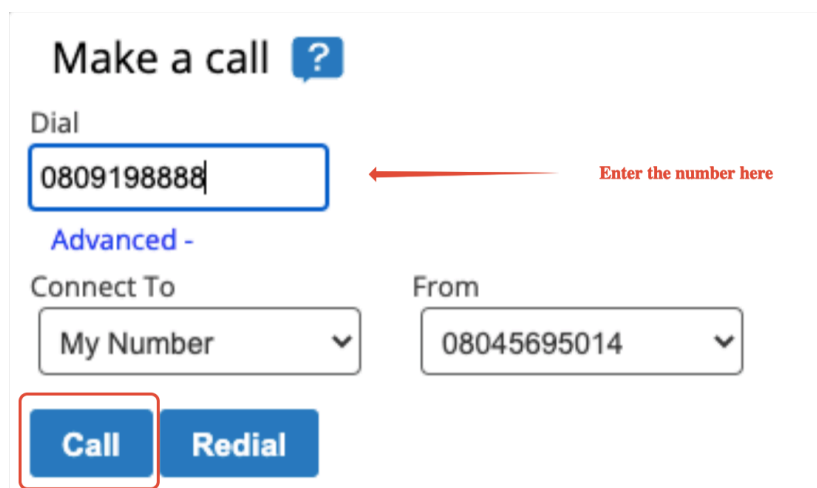
The KYC is mandatory for all Indian users for making outgoing calls. Complete your verification on the KYC Docs page: <https://my.exotel.com/exotel/settings/kyc> before you want to do an outbound call from the dashboard.

How to Trigger Outbound Calls from the Dashboard

- Login to your Exotel dashboard.
- Make sure that you are switched on



- Click on the "Call" button in the top left section, and you'll get a popup like this:



- In the text box, enter the phone number that you want to be connected to. For landline numbers please enter the STD code as well. Click 'Call'.
- **The system will first call you on the number you have entered as 'Your Phone Number' under the Co-workers and groups section**
- Pick that call & then the system will call the person whose number you entered. Once they pick up, both of you can talk. The conversation is recorded and stored in the inbox just like all other calls.

Advanced options

Connecting a number to a pre-configured app

Calling a number and linking it to an app are further options. Follow these steps to do that:

- Click on the Call button and enter the number in the "Dial" section.
- Click the "Advanced section". It opens up a couple of more options.
- to In the "Connect To" dropdown, choose the app that you wish to connect the number to

- Click on the "Call" button.

The end-user will be connected to the call flow and the call gets routed or a greeting message plays depending on the call flow that you have chosen.

Make a call

Dial

08088919888

Advanced -

Connect To

Timing Call flow
▼

From

08045695014
▼

Call

Redial

Choose the call flow from the drop down



Can I choose the different ExoPhone to dial out of?

You might have more than one ExoPhone available on your account and might wish to dial out of a different ExoPhone. That's easy to do.

Make a call

Dial

08088919888

Advanced -

Connect To

Timing Call flow
▼

From

08045695014
▼

Call

Redial

Choose a different exophone here



Under the **"Advanced"** section, choose the ExoPhone from the **"From"** dropdown and click "Call". Once chosen - That number will now become your default until you change it once again.

Debugging

Generally, a will call takes a few seconds to land on your phone.

There might be times when you initiate the call and the call doesn't land on your phone. In such cases, you can try the following:

- Check if your mobile/landline number is reachable by asking a colleague to call. Observe the time it takes for the call to land on your number. If it takes anything more than 7-8 seconds, it might be a network problem to connect to your mobile/landline number.
- It might be a temporary issue with your current ExoPhone. If you have an alternate ExoPhone, use that by following the steps above (Under Can I choose the ExoPhone to dial out of)
- If you don't have an alternate ExoPhone, and if your mobile/landline number is reachable, wait for a couple of minutes and try again.
-

Help & Support

Search Articles 

 test@exotel.in

 User Name

 Outgoing calls are not working

B

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U





A

A

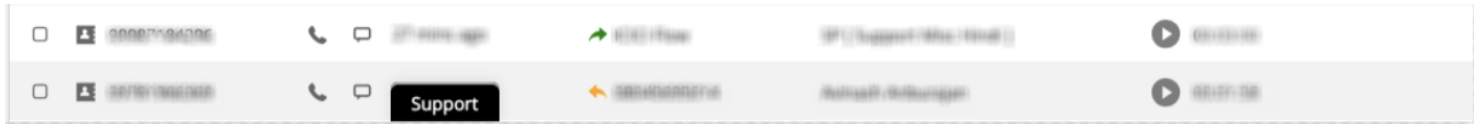


Hello Team,

My Outgoing calls are not connecting since morning.

Send Feedback

You'll get a popup like this:



If the call still doesn't connect, click on the **Support button at the bottom of your inbox.**

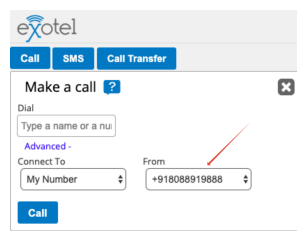
- Specify the details of the issue such as - when did the problem start? Is it continuous or intermittent? Do the other co-workers in your organization get calls from Exotel? Make sure you click on the Take a screenshot option and send us the screenshot. This will help us debug better.
- Finally, click Send Feedback

Frequently Asked Questions

What is my caller ID (or) What number should I choose?

If you have multiple numbers in your account, then you can choose to make an outbound call from a number of your choice. Currently, everyone in your account has access to all the numbers in your account for the purpose of an outgoing call. Which number to choose, depends on what role (as an agent) you play and whom you are calling.

For example, in Exotel's case, our support number is 8088919888. If I am a part of support and if I am returning a missed call, then I could choose to select this as my number to make the call.



Also, if the customer does not pick up the call and later chooses to call the same number back, you might want the call to come to the same person or group. This person or someone from the same group can pick up the call and do the needful. In this case, once the customer calls back, the flow attached to that number you called from, will be followed. You can check the mapping of the flows and the ExoPhones here. Once chosen, Exotel remembers your last choice and always uses this number for all other outbound calls unless you explicitly change it again by clicking on the "**Advanced -**" link again.

Please note that if you have any Mobile Virtual Number(MVN) in your account, you will be able to choose the MVN to make the outgoing call, but the caller ID that will be displayed on the phone would be the landline number attached to the MVN.

What is the caller ID that my customers see during an outbound call?

When you make outbound calls, the calls will go out from our PRI and the caller ID that the customer will see will be the landline number (ExoPhone) that you see in your account or one of the redundant backup numbers. If the customers call back on a backup number, they will still be connected to your inbound call flow. More about it here.

When I make an out-bound call, why do my customers get a call from a different number instead of the Exophone that I have purchased?

When you make a call to your customers, they will see your Exophone number on their phone's caller ID.

However, there may be some connectivity issues between your Exophone and the customer's number while making an outbound call. When this happens, the Exotel system connects the call with a redundant/backup Exophone. Only in this case would your customers see a number that isn't the same as your Exophone.

With an example, I'll clarify this further. Let's imagine you buy the Exotel phone number 080-XXXXYYYYY for your company. You will also be given redundant phone numbers such as 080-XXXXZZZZ. These redundant numbers are normally concealed from the system and are only utilised when the primary Exophone is down.

When you make outbound calls, your consumers will get a call from 080-XXXXYYYY (Your primary Exophone). This is the caller ID number they will see on their phone.

When your primary Exophone, 080-XXXXYYYY, is unable to connect with the customer's number, the call will be transferred to 080-XXXXZZZZ (Your redundant Exophone).

We would add the backup number from the backend based on the health of the ExoPhone, so you don't have to make any modifications to the call flow or dashboard.

You will not be charged for the backup number!

What if the call is missed and the consumer dials 080-XXXXZZZZ. Then there's no problem since this duplicate number operates as a clone of the 080-XXXXYYYY (Your primary Exophone) and all the options would work similarly!

Please note that the backup number will only be displayed on the phone when a call is received through the backup number, and it will not appear in the dashboard or report.

Can you ensure that the number that I own shows up as the caller ID?

Unfortunately no. Caller ID masking is illegal in India and we won't be able to do that.

Will I own the ExoPhone?

Exotel will continue to own these landline numbers which are part of Exotel's PRLs and the ownership of these numbers cannot be transferred to you. But in case there is business exigency, and you choose to move away from Exotel, we will try to ensure on a goodwill basis that the calls that land on this number are diverted to you (at a cost).

Will the ExoPhone number be assigned only to me?

Yes, unless you remove it from your end. As long as you continue to use Exotel, this ExoPhone number will be exclusively assigned only to you.

Why am I charged for failed calls?

Please refer to this article: [Why am I charged for failed calls?](#) to know more about how why and when you will be charged for failed calls.

7.3. Call Notification



HTML & iframes are not visible in the CMS

For security reasons, iframe and HTML blocks are only rendered on your published documentation site, not in the Content Management System.

What notifications do I get for calls and where do they show up?

A pop-up notification on your right bottom of Dashboard, when you receive a call. Read Know your customer for detailed info. Note that details of the caller like the name will be displayed only if they're saved in the Exotel Address book

The screenshot shows the Exotel dashboard interface. On the left is a sidebar with navigation links: LIVE, Dashboard Beta, CALLS, Inbox, mudit-group, SMS, SMS Stats Beta, Templates Beta, Outbox, TOOLS, WhatsApp Beta, ExoVerify New, Campaigns, CONTACTS, Address book, Co-workers and Groups, and ADMIN. The main area displays a table of call logs with columns: FROM, TO, DIRECTION, EXOPHONE/FLOW, TIME, OUTCOME, and CALL DURATION. The table lists several incoming and outgoing calls. A call detail pop-up is visible on the right, showing the name 'Mudit', a profile picture, and the number '083****9175'. Below the number, it says 'Group: mudit-group'. At the bottom of the pop-up, there is a status indicator 'Available' and a blue 'X' icon.

FROM	TO	DIRECTION	EXOPHONE/FLOW	TIME	OUTCOME	CALL DURATION
Mudit		Incoming	Incoming-call-po...	a minute ago	Mudit	- X
Mudit		Incoming	Incoming-call-po...	1 mins ago		
Mudit		Incoming	Incoming-call-po...	3 mins ago		
jeevant bihari2		Outgoing	+9144****7305	13 mins ago		
jeevant bihari2		Outgoing	+9144****7305	19 mins ago		
jeevant bihari2		Outgoing	+9144****7305	19 mins ago		
jeevant bihari2	vijay kumar	Outgoing	+9144****7305	20 mins ago		
jeevant bihari2	vijay kumar	Outgoing	+9144****7305	21 mins ago		
jeevant bihari2		Outgoing	+9144****7305	32 mins ago		
jeevant bihari2		Outgoing	+9144****7305	37 mins ago		
jeevant bihari2		Outgoing	+9144****7305	37 mins ago	Support	Available

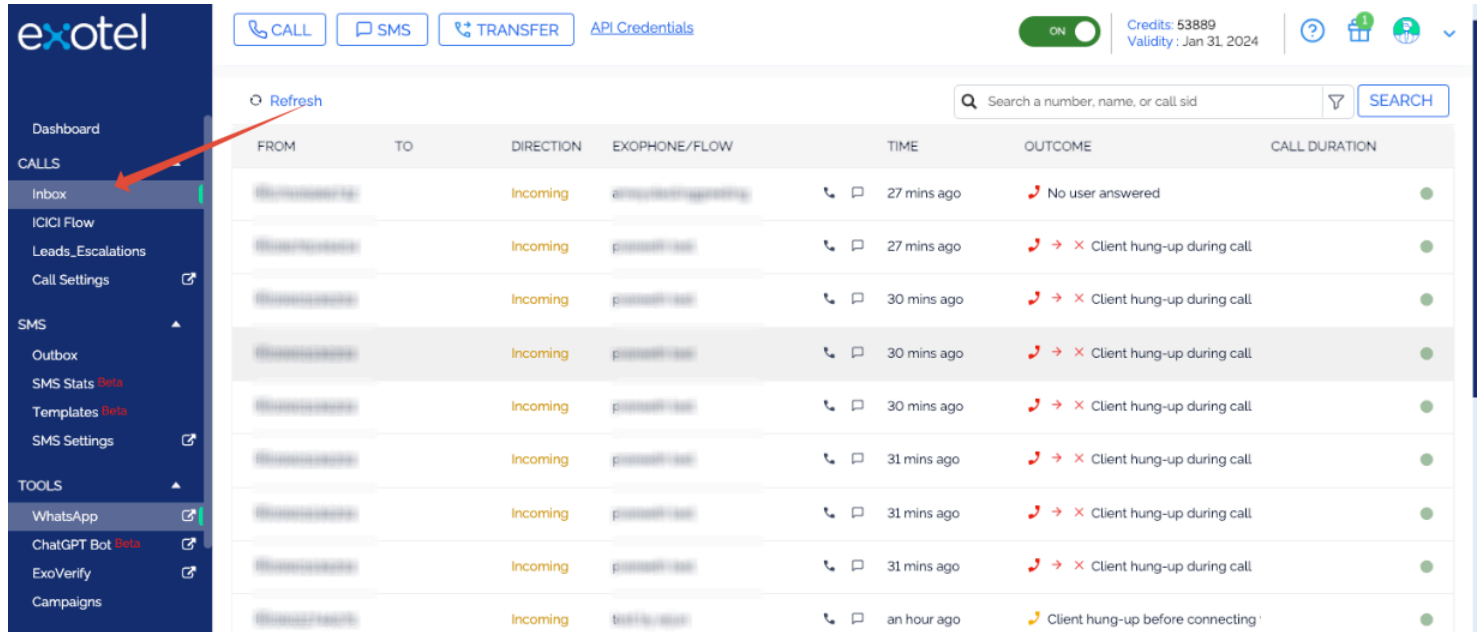
Additionally, If you are an administrator(**Admin**) of your Exotel Account, then:

- You can get mail about incoming calls that don't reach any group (Call attempt notification email) by adding an [Email applet](#) at the end of the call flow.
- You also get a [Notification](#) email for the outbound call that you make from Exotel dashboard.
- You can also download an entire day's call reports from My Account->Reports the next day. See [Call Reports](#)

7.4. Call Reference ID

You might have heard from our support team asking for reference IDs when asked for assistance in call and SMS concerns.

A reference ID is a set of unique alphanumeric characters assigned to every call and SMS that happens to your account. Please click on the grey color radio button which is on the rightmost side of your inbox.



Dashboard

CALLS

Inbox

ICICI Flow

Leads_Escalations

Call Settings

SMS

Outbox

SMS Stats *Beta*

Templates *Beta*

SMS Settings

TOOLS

WhatsApp

ChatGPT Bot *Beta*

ExoVerify

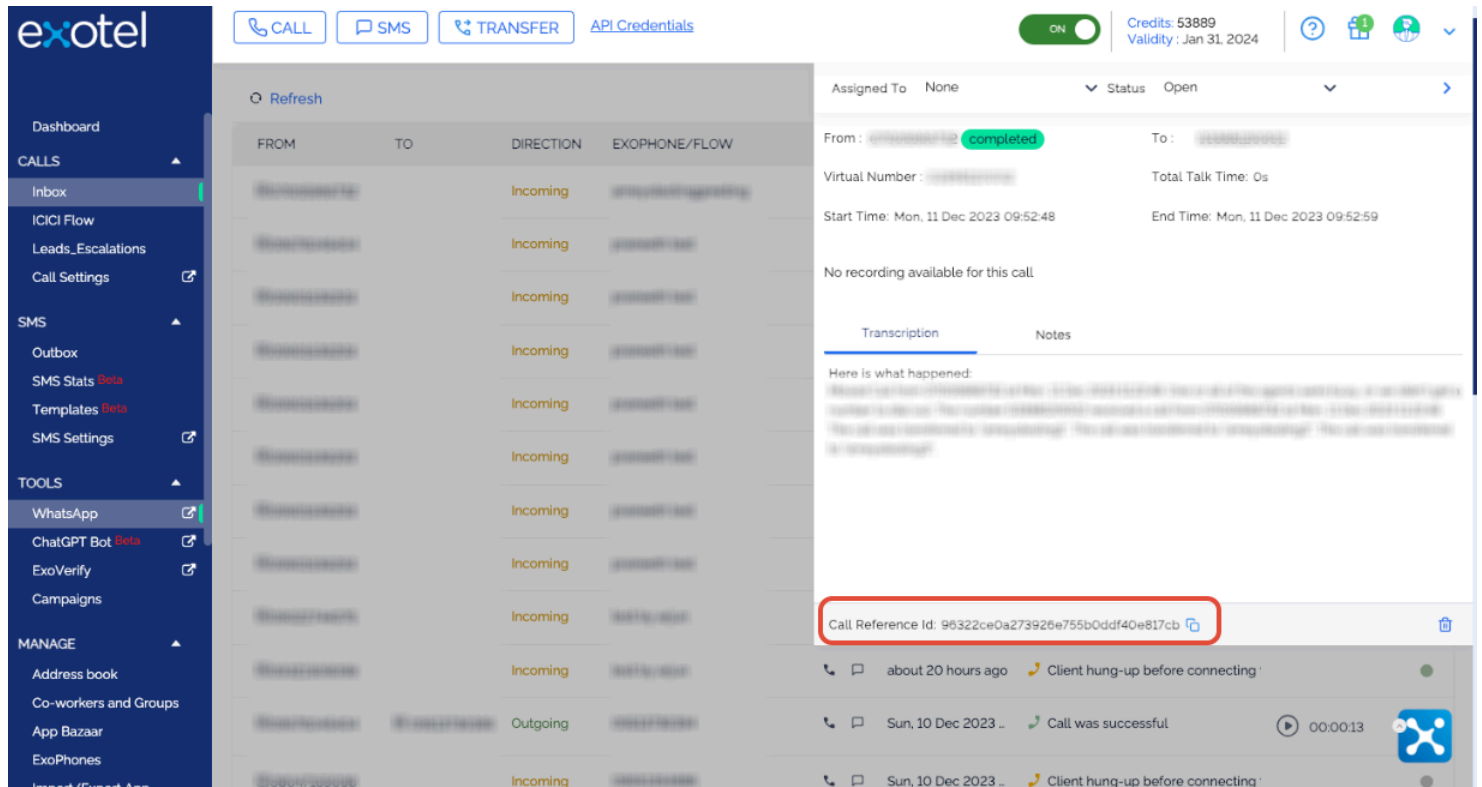
Campaigns

Refresh

Search a number, name, or call sid

FROM	TO	DIRECTION	EXOPHONE/FLOW	TIME	OUTCOME	CALL DURATION
09876543210	09876543210	Incoming	09876543210	27 mins ago	No user answered	
09876543210	09876543210	Incoming	09876543210	27 mins ago	Client hung-up during call	
09876543210	09876543210	Incoming	09876543210	30 mins ago	Client hung-up during call	
09876543210	09876543210	Incoming	09876543210	30 mins ago	Client hung-up during call	
09876543210	09876543210	Incoming	09876543210	30 mins ago	Client hung-up during call	
09876543210	09876543210	Incoming	09876543210	31 mins ago	Client hung-up during call	
09876543210	09876543210	Incoming	09876543210	31 mins ago	Client hung-up during call	
09876543210	09876543210	Incoming	09876543210	31 mins ago	Client hung-up during call	
09876543210	09876543210	Incoming	09876543210	an hour ago	Client hung-up before connecting	

When you click on the radio button, a slide-in window appears where you can find the reference ID of that call.



Dashboard

CALLS

Inbox

ICICI Flow

Leads_Escalations

Call Settings

SMS

Outbox

SMS Stats *Beta*

Templates *Beta*

SMS Settings

TOOLS

WhatsApp

ChatGPT Bot *Beta*

ExoVerify

Campaigns

MANAGE

Address book

Co-workers and Groups

App Bazaar

ExoPhones

Import/Export App

Refresh

Search a number, name, or call sid

Assigned To: None

Status: Open

From: 09876543210

To: 09876543210

Virtual Number: 09876543210

Total Talk Time: 0s

Start Time: Mon, 11 Dec 2023 09:52:48

End Time: Mon, 11 Dec 2023 09:52:59

No recording available for this call

Transcription

Notes

Here is what happened:

Call Reference ID: 96322ce0a273926e755b0dd40e817cb

about 20 hours ago

Client hung-up before connecting

Sun, 10 Dec 2023

Call was successful

Sun, 10 Dec 2023

Client hung-up before connecting

To find the reference ID for SMS, please click on the Outbox tab which is on the left-hand side of the panel --> click on any on the SMS status --> a slide-in window will appear as shown in the picture below:

[illegible]

Why do we ask for a reference ID?

A lot of calls happen on our servers and hence it is very difficult to find the correct call without this information. Hence we require your help in this area to resolve the issues at the earliest.

7.5. Click to Call

What is Click to Call?

The Click-to-Call, also known as click-for-talk or click-to-dial, refers to a type of digital communication in which a person clicks a button to connect with another individual in real-time, without either of them actually dialling the number.

In this solution, there are two calls involved which can be termed as two call legs (Leg1 & Leg2). Both the call legs are dialled by Exotel as outbound calls

- Leg 1: Exotel to Partner / Agent / User (P/A/U)
- Leg 2: Exotel to Customer / End-user

Exotel will dial leg 2 once leg 1 answers the call. Once leg 2 also picks up the call, the call is patched to leg 1.

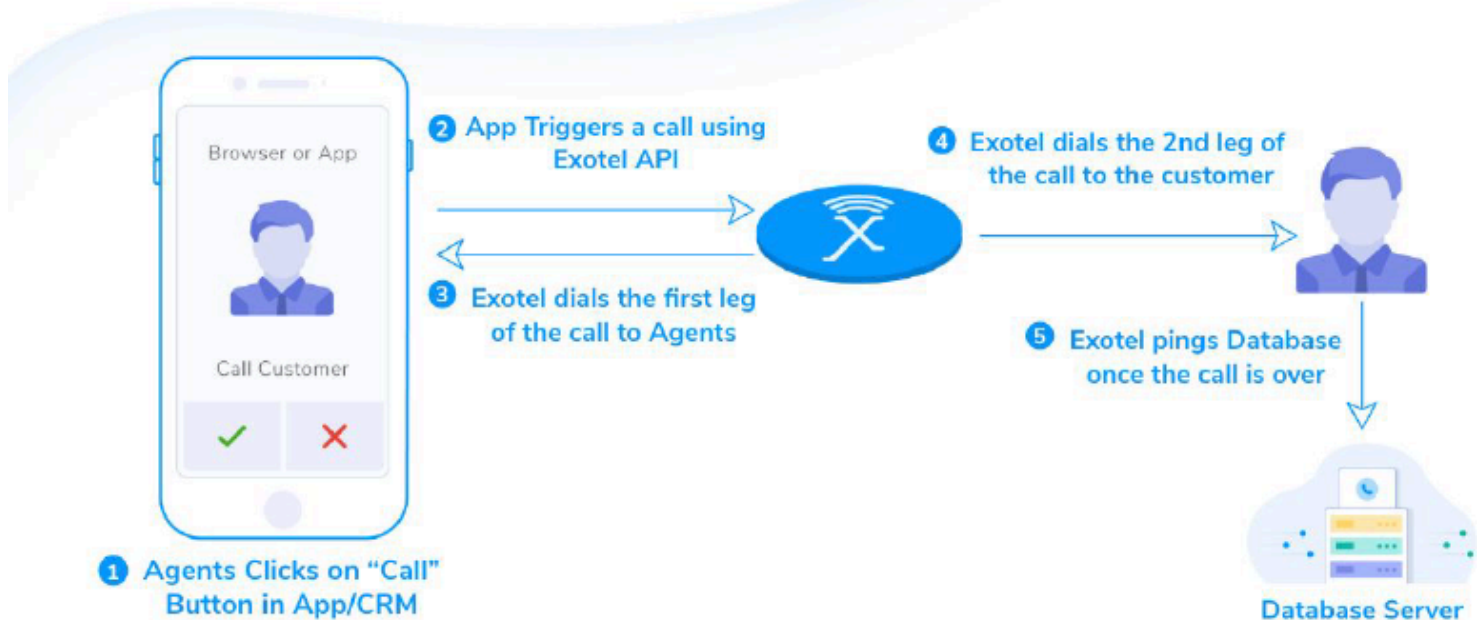
This solution is very reliable in terms of successful dials on both legs. As Exotel dials both the call legs, at run-time Exotel can figure out a working VN and use that for dialling.

In case the call doesn't go through (due to a particular operator issue), Exotel will dial it via a secondary route to ensure maximum connectivity.

With regards to a click-to-call use case, the user needs to use a mobile app/Dashboard/CRM to be able to trigger the call. Also, an internet connection will be needed to initiate the API call even though the calls are connected via PSTN.

How it works?

Option 1 (Through CRM/App portal)



Click-To-Call API

<https://developer.exotel.com/api/#call-agent>

Implementation

- Replace `<your_api_key>` and `<your_api_token>` with the API key and token created by you.
- Replace `<your_sid>` with your "Account sid"
- Replace `<subdomain>` with the region of your account
`<subdomain>` of Singapore cluster is @api.exotel.com
`<subdomain>` of Mumbai cluster is @api.in.exotel.com

`<your_api_key>` , `<your_api_token>` and `<your_sid>` are available in the API settings page of your [Exotel Dashboard](#)

Mandatory Parameters

Parameter Name	Mandatory / Optional	Value
From	Mandatory	String; The phone number that will be called first. Preferably in E.164 format . If not set, our system will try to match it with a country and make a call. If landline number, prefix it with STD code; Ex: 080XXXX2400
To	Mandatory	String; Your customer's phone number. If landline number, prefix it with STD code; Ex: 080XXXX2400
CallerId	Mandatory	String; This is your ExoPhone/Exotel Virtual Number (pick one from here)

Check out this blog to know more about the click-to-call feature <https://exotel.com/blog/simple-guide-to-click-to-call>

7.6. Call Recordings



HTML & iframes are not visible in the CMS

For security reasons, iframe and HTML blocks are only rendered on your published documentation site, not in the Content Management System.

Quality control and compliance are now crucial components of contact centre setups. This increasing demand can be met via call recordings that can be afterwards reviewed and assessed with the aid of speech analysis in order to ascertain whether agents are adhering to call flows, developing rapport, proposing cross-sell products, regulating the call, delivering accurate information, etc. Additionally, they are utilised for teaching sessions and the quality rating of an agent's performance. Call recordings provide a direct, unbiased record of the client experience, making them a valuable source of data that can be utilised to optimise operations and the quality of services offered.

Types of Recordings

1. Mono Standard recording (8 kbps)
2. Mono High Quality recording (32 kbps)
3. Stereo Standard recording (12 kbps per channel i.e. 24 kbps)
4. Stereo High Quality recording (32 kbps per channel i.e. 64 kbps)

In case you had a successful inbound call where your user spoke to the caller, you would be able to play your call recording in your inbox (within a few minutes of the call).

How to enable/configure Call recording?

1. Go to App Bazar
2. Go to the Installed Apps page
3. Click on the 'Edit call app' link of the required app (which handles calls to your Exotel number)
4. Navigate to the Connect applet
5. Check the 'Record this call?' option

Distribute Calls

☒	Sequentially <i>in the order they appear in the group</i>
☐	Equally <i>across all members of the group</i>

Record this call?	☒
Recording Channels? Beta ?	☒ Single ☐ Dual
Sticky agent? ?	☐
Limit ringing duration to:	seconds (Default: 30s)
Limit conversation duration to:	mins (Blank for 4 hours)

If you haven't enabled this option the calls will not be recorded.

How to enable/configure Stereo and High Quality recording?

1. The HQ recording feature will be available to the tenant, both in API and Dashboard, after enabling it for the account.
2. Without activation, the recording option appears as below in the connect applet. When the HQ recording is not enabled and the box for "Record this call?" is checked, the Recording Format parameter will not be visible and by default standard MP3 recording format will be selected.
3. The Recording channels as Single will enable Mono Standard Recording and Stereo Standard Recording can be enabled just by selecting Dual in recording channels.
- 4.

Record this call?	☒
Recording Channels? Beta ?	☒ Single ☐ Dual
Sticky agent? ?	☐
Limit ringing duration to:	seconds (Default: 30s)
Limit conversation duration to:	75 minutes (Max: 75 mins)

Stereo standard recording can be enabled for click2call.

1. If further superior quality is required(32kbps and 64kbps) ,HQ recording flag is enabled and the RecordingFormat parameter will be populated.
2. High Quality recording:

Dial using different Exophone?	☐
Parallel Ringing?	☐
Limit concurrent parallel attempts to:	calls (max: 5)
Record this call?	☒
Recording Channels? Beta ?	☒ Single ☐ Dual
Recording Format? Beta ?	☒ MP3 ☐ MP3 HQ
Sticky agent? ?	☐

This feature is not be available by default for all accounts . If you are not able to see them in the Connect Applet, drop a mail to hello@exotel.in or talk to your Account Manager.

Currently, Record and Recording Channels parameters are provided in the Outgoing call connecting number API. With HQ recording, a new Recording Format can also be provided with the option of MP3 HQ and RAW format.

Parameter	Mandatory / Optional	Value
Record	Optional	Boolean; Record the conversation of your call. The RecordingUrl will be sent to the StatusCallback URL if this is set to 'true' and the call conversation happens. Can be: - true (default) - Call conversation will be recorded. - false - Call conversation will not be recorded.
RecordingChannels	Optional	String; Number of audio channels to be present in the final recording. This parameter works if Record is set to 'true'. Can be: - single (default) - Record both legs of the call in a single channel of the recording file. - dual - Record the caller and the callee into separate channels of the recording file.
RecordingFormat	Optional	String; Recording Format shall have below options: - mp3 (Default) - mp3-hq :- This option shall enable 32Kbps/channel recording

Sample Request

```
curl --location --request POST 'https://<api_key>:<api_token>@api.exotel.com/v1/Accounts/<AccountSID>/Calls/connect.json?From=<callingnumber>'
```

StatusCallback

The recordingURL can be accessed from the statuscallback after the call is completed.

```
▼ body {4}
  CallSid: 21eca3dce51f9c4e4342935d4a82158h
  DateUpdated: 2021-08-17 09:25:55
  ▼ RecordingUrl
    https://s3-ap-southeast-
    1.amazonaws.com/exotelrecordings/Exotel/21eca3dce51f9c4e4342935d4a8
    2158h.mp3
  Status: completed
```

How long will Exotel store the call recordings?

Quality control and compliance are now crucial components of contact centre setups. A useful source of information that may be used to improve operations and the calibre of services provided, call recordings give a direct, unbiased account of the client experience. Call recordings that are later examined and evaluated with the use of speech analysis can be used to satisfy this growing need in order to determine whether agents are following conversation flows, building rapport, suggesting cross-sell items, managing the call, providing accurate information, etc. They are also used for training sessions and to rate the effectiveness of an agent's work.

Storage availability :

The call recordings are kept on file for up to **6 months (180 days) after the call date**. This indicates that you have up to six months to download, stream, and listen to call recordings from your Exotel dashboard.

The message in your inbox will still be there after six months, but you won't be able to download the recordings.

Additionally, we advise you to download the recordings in bulk and save them on your server or computer.

Why am I unable to listen to my call recording?

Sometimes you may notice a recording that says "This call recording does not exist....". This happens because you may have not checked the Record this call? option in your custom app. To change it -

1. Go to App Bazar
2. Go to the Installed Apps page
3. Click on the 'Edit call app' link of the required app (which handles calls to your Exotel number)
4. Navigate to the Connect applet
5. Check the 'Record this call?' option

For an incoming call, my URL gets a GET call which has the recording URL. Is there a way to get the URL of the outgoing call recording as well?

You can use the statuscallback parameter in the outgoing call API and define the statuscallbackevents to the terminal which would trigger the call details once the call is completed.

See <https://developer.exotel.com/api/make-a-call-api#statuscallback>

An alternate way is to download the call reports (which is a CSV file) and parse them.

Call Reports

You can also implement the call details API for single or bulk calls to access the call details and the recordings. Please refer here for more details.

Note: Reports do not have real-time data. Read more about reports here.

7.6.1. Download Call Recordings

Download individual recordings from Dashboard

To download individual recordings, click on the conversation you'd like to download. The details of the call will appear in the new pop-up window. There will be a download button in this window, check for the three dots. Click on it to download the recording.

The screenshot shows the Exotel dashboard interface. On the left is a sidebar with navigation links: LIVE, Dashboard Beta, CALLS, Inboxes, Account, Operator, SMS, Outbox, TOOLS, ExoVerifyNew, Campaigns, CampaignsNew, SMS CampaignsComing Soon, WhatsApp CampaignsGet Access, CONTACTS, Address book, Co-workers and Groups, ADMIN, App Bazaar, ExoPhones, SMS Configurations, and Access Control. The main area displays a list of calls. A call from '021 10:01' is selected, showing a 'Support' button. A pop-up window for this call is open, showing details: Call Reference Id, Total Talk Time (39s), Call Time (Thu, 19 May 2022 14:16:55), Start Time (Thu, 19 May 2022 14:16:55), End Time (Thu, 19 May 2022 14:17:48), Transcription (Outbound Call received by Admin), and Private Notes. A 'Download' button is visible in the pop-up window.

Download recordings in bulk

First, download the report of your choice. If you are on a *nix machine and if you have access to a shell, then you could run the following command:

```
for i in `cat Exotel_exotel_incoming_reports_dec_09.csv | cut -d , -f 14 | grep -v recording-file-does-not-exist | grep -v RecordingUrl` ;
```

You will need to download any call report containing the voicemail links you want to download on your Linux Terminal, filter it according to the agents/groups numbers, etc, and store it.

You need to replace `Exotel_exotel_incoming_reports_dec_09.csv` with the file name you have, run the command on your terminal and the call recordings will get downloaded.

Or, if you could use this PHP script to download in bulk:

```
<?php

/*
USAGE : php bulk.php report.csv(The Call Report should be the input) output_dir(Eg: /Desktop)

The first argument is for the Report file from which the recordingUrl is extracted
The second argument is the path of the directory/folder in which you need your recordings to be present

*/

$file = $argv[1];
$outputdir = $argv[2];

if (empty($file)) {
    print "Must provide a input file.\n";
    print $helptext;
    exit(1);
}
if (empty($outputdir)) {
    print "Must provide a outputdir.\n";
    print $helptext;
    exit(1);
}

//Provide the row number of recordingurl in the csv file
$recordingfield = 1;
if (($handle = fopen($file, "r")) !== FALSE) {
    while (($data = fgetcsv($handle, 0, ",")) !== FALSE) {

        //Picking up the recording url and downloading into the outputdir
        if(!empty($data[$recordingfield]) && ($data[$recordingfield]!="RecordingUrl")) {
            $recordingurl = $data[$recordingfield];
            echo $recordingurl."\n";
            echo "Fetching recording ...\n";
            $path = pathinfo($recordingurl);
            $filename = $path['basename'];

            $ch = curl_init($recordingurl);
            curl_setopt($ch, CURLOPT_HEADER, 0);
            curl_setopt($ch, CURLOPT_NOBODY, 0);
            curl_setopt($ch, CURLOPT_TIMEOUT, 5);
            curl_setopt($ch, CURLOPT_RETURNTRANSFER, 1);
            curl_setopt($ch, CURLOPT_SSL_VERIFYPEER, 1);
            curl_setopt($ch, CURLOPT_SSL_VERIFYHOST, 2);
            $output = curl_exec($ch);
            $status = curl_getinfo($ch, CURLINFO_HTTP_CODE);
            curl_close($ch);
            if ($status == 200) {
                file_put_contents($outputdir."/".$filename, $output);
            }
            echo "Done\n";
        }
    }
} else {
    echo "Function is not working";
}

fclose($handle);
```


7.6.2. Secure Call Recording

Secure Recordings Beta is available on request via hello@exotel.com and incurs additional charges.

This feature gives the following capability:

- All your call recordings are stored in a separate secure private s3 bucket within Exotel.
- Recordings can be accessed only if the user is logged into the Exotel dashboard.
- To gain access to recordings via Exotel Dashboard or API, signed URLs are utilized with a short TTL (time to live).
- Another customized way to access the secure recording is IP based whitelisting where the URL can be accessed only behind certain IP addresses.

To access such recordings via API, refer to Bulk Call Details API and use the optional parameter 'RecordingUrlValidity' which will set the time in minutes for which the URL can be accessed. The 'RecordingUrlValidity' value can be set in integer (Min: 1, Max: 1440) and the default is set to 30.

VoiceMail Recordings and Call Recording will go inside an account-specific folder, wherein for secure-recording enabled accounts, this folder would be in a secure bucket, for other accounts it will be in unsecure bucket.

Limitation:

- If this is enabled for an account, RecordingURL in Reports, Passthru, and Single Call Details API will not be playable.

PreSigned Recording URL

We have another mechanism to access Call Recording URLs through the Signed URL approach. It is an account level feature and once enabled will start sending an extra parameter of “**PreSignedRecordingUrl**” which will contain the Signed Recording URL, in the API response of **GET Call Details API** and **GET Bulk Call Details API**. The signed recording URL will have a TTL (time to live) associated with it and allow access to the signed recording URLs for a limited time period. By default, this will be set to 5 minutes at the account level. This value can be modified between 5 minutes to 60 minutes at the time of enabling the feature for a particular account.

How To Modify TTL At Per API Request Level?

In order to give granular control at the API request level, we have introduced a new query parameter in GET Call Details API and GET Bulk Call Details API - “**RecordingUrlValidity**”

This query parameter accepts an integer value equal to or between 5 and 60, and **overrides the account level configuration**. For the “**PreSignedRecordingUrl**” returned in the API response, the TTL will be set to the value passed in the “**RecordingUrlValidity**” parameter.

Parameter Name	Description	Value Accepted	Exceptions
RecordingUrlValidity	This parameter will return a PreSignedRecordingUrl in the response for both the GET Bulk Call Detail and GET Call Detail APIs, with the TTL specified in minutes. Max Value that can specified is 60 i.e 1 Hr Default Value: 5 mins (if the parameter is not specified)	An Integer equal to or between 5 and 60	If the value is greater than 60 or less than 5 then it will return a 4XX Error

How To Enable?

Talk to your Account Director or CXM and get it enabled.

Alternatively, raise a request to hello@exotel.com

Important Note

- The **RecordingUrl** parameter contains the call recording URL which will continue to be accessed only through either **Authentication (API Key & API Token) or IP Whitelisting**.
- The **PreSignedRecordingUrl** parameter contains the same call recording but with a Signed URL, accessible for a time period equivalent to default TTL or the one set in the API request through the parameter **PreSignedRecordingUrlValidity**.

7.6.3. Enabling Applet-Level Call Recording

Enabling Applet-Level Call Recording

Overview

This guide demonstrates how enterprises can dynamically control call recording within their Exotel applet flow using the **Passthru Applet** (GET request) and **Recording API** (POST request). This setup enables selective, event-driven recording control – for example, starting the recording before a greeting or IVR prompt and stopping it before agent transfer.

The implementation combines the [Passthru Applet](#) and [Call Recordings](#) to allow real-time backend-triggered recording.

How It Works

- 1. Use Passthru Applet (GET):** The Passthru applet sends call information such as CallSID, From, and To parameters to your backend via a GET request.
- 2. Backend Triggers Recording API (POST):** Your backend receives the GET request, extracts the CallSID, and immediately makes a POST call to the **Recording API** to start recording.
- 3. Continue Call Flow:** The call proceeds through the configured applets (Greeting, IVR, Gather, etc.) while recording remains active.
- 4. End-of-Flow Stop Recording:** At the final stage, another Passthru applet sends a GET request to your backend endpoint (e.g., /stop_recording), which triggers a POST API call to stop recording.

This ensures Exotel only records the specific portion of the call you need, such as the main interaction, and not hold or transfer periods.

Step-by-Step Implementation

1. Configure the Passthru Applet (Start Recording)

- Add a **Passthru Applet** at the point in the flow where you want to begin recording.
- Set the Passthru applet's GET **URL** to a backend endpoint like `https://yourdomain.com/start_recording`.
- When executed, Exotel performs a **GET** request to this endpoint with call details appended as query parameters:

```
https://yourdomain.com/start_recording?CallSid=abcd1234efgh5678&From=%2B919900112233&To=08088919888&CallType=outgoing
```

Your backend should capture the CallSid from this GET request query params

2. Backend: Invoke Start Recording API (POST)

Your backend now calls Exotel's Recording API using the captured CallSid.

POST

```
https://<your_api_key>:<your_api_token><subdomain>/v1/Accounts/<your_sid>/Calls/<CallSID>/recording.json
```

Example:

```
curl --location 'https://<base_url>/v1/Accounts/<AccountSID>/Calls/<CallSID>/recording.json' \
--header 'Content-Type: application/x-www-form-urlencoded' \
--data-urlencode 'Action=START' \
--data-urlencode 'RecordingChannels=dual' \
--data-urlencode 'RecordingFormat=mp3-hq' \
--data-urlencode 'StatusCallback=<status_callback_url>' \
--data-urlencode 'Leg1Recording=True'
```

Replace `<your_api_key>` and `<your_api_token>` with the API key and token created by you.

- Replace `<your_sid>` with your “Account sid”
- Replace `<subdomain>` with the region of your account
 1. `<subdomain>` of Singapore cluster is @api.exotel.com
 2. `<subdomain>` of Mumbai cluster is @api.in.exotel.com

`<your_api_key>`, `<your_api_token>` and `<your_sid>` are available in the API settings page of your Exotel Dashboard

Parameter Reference:

Parameter	Type	Description
Action	String	START or STOP to control recording.
RecordingChannels	String	Optional – Audio channels. • single (<i>default</i>) – Both legs mixed. • dual – Caller/callee recorded separately.
RecordingFormat	String	Optional – Audio quality. • mp3 (<i>default</i>) – Standard bitrate. • mp3-hq – High bitrate (32 kbps/channel). Requires enablement via hello@exotel.com.
StatusCallback	URL	Callback endpoint for recording status.
Leg1Recording	Boolean	True to record only the first call leg.

3. Continue with Business Applets

After triggering the start recording API, your flow continues normally with applets such as:

- **Greeting Applet:** Playback welcome message.
- **IVR Applet:** Capture user selections.
- **Gather Applet:** Collect input.
- **Connect Applet:** Transfer to agent.

Example Flow:

Passthru (GET → start_recording) → Backend (POST → Start Recording API) → Greeting → IVR → Gather → Passthru (GET → stop_recording)

4. Configure Passthru Applet (Stop Recording)

At the end of the flow:

- Add another **Passthru Applet** configured to call a URL like `https://yourdomain.com/stop_recording.`

- This GET request from Exotel again includes the CallSid.
- Your backend receives this GET, extracts the CallSid, and invokes:

```
curl --location 'https://<your_api_key>:<your_api_token><subdomain>/v1/Accounts/<your_sid>/Calls/<CallSID>/recording.json' \  
--header 'Content-Type: application/x-www-form-urlencoded' \  
--data-urlencode 'Action=STOP'
```

This cleanly terminates recording at the end of the call.

Recording Access

- **Dashboard:** Under each call log.
- **Call Detail APIs:** <https://developer.exotel.com/api/make-a-call-api#call-details>

Compliance Notes

- The Passthru applet always sends a **GET request** to your backend; the enterprise must use POST to trigger or stop recording.
- Obtain customer consent per regional compliance rules.
- *mp3-hq* is an optional, on-demand feature.
- Recordings are stored securely in Exotel's environment.

Example Use Case

Scenario: A customer support survey where only the IVR interaction is recorded.

1. Passthru applet sends GET to backend → backend triggers **Start Recording (POST)**.
2. IVR runs and records customer input.
3. Final Passthru sends GET → backend triggers **Stop Recording (POST)** before agent connection.

This ensures only the main customer interaction is captured.

References

[Passthru Applet](#)

[Call Recordings](#)

[Secure Call Recording](#)

7.7. DTMF

DTMF (Dual-tone multi-frequency) is an in-band telecommunication signaling system using the voice-frequency band over telephone lines between telephone equipment, other communications devices, and switching centers. The tones are decoded on the receiving end and used for practical applications such as interacting with computer systems and answering machines. The interaction with a computer system is achieved using an IVR (Interactive voice response) system.

Over a regular landline, DTMF is sent as audio signals & the tones are transmitted through the same wires that carry the voice signals. In the case of mobile phones, DTMF tones can be generated only after the connection is established.

How do we use it?

This feature is often used by call centers for gathering inputs from callers for the selection of IVR menus, capturing account information for phone banking facilities, and so on, however, this is prone to errors such as echo or packet loss during transmission, distorting the data and making it difficult to rebuild the keypress combination at the receiving end.

Use-case

One of the ways our clients use the Last-mile delivery solution is by triggering calls programmatically via the **ExoPhone, digits#** tuple (Ex: 08033013302,12345#) & often times, we see them reach out to us inquiring as to why DTMF doesn't always get captured.

Setup

In this case, the call flow would roughly have the following applet(s) -

Gather > Passthru > Connect

OR

Gather > Connect

Note that while these call flows **always start with a Gather applet**, the way DTMF works and what have been our findings will hold good even for the normal IVR use-cases as well.

7.7.1. Troubleshooting DTMF

DTMF (Dual-tone multi-frequency signalling) uses voice frequency which is transmitted over telephone lines for capturing digits upon key press. Such tones are passed from the handset across one or more intermediate operator lines before it finally reaches Exotel.

DTMF can be sent across phone networks in multiple ways, one is “In-Band Signalling”, where the DTMF tones are played in the audio channel of the call; whereas in the case of “Out-of-Band Signalling”, the tones are sent in a separate signalling channel.

Scenarios: What can go wrong in DTMF capture-

- Digits are not captured at all even after key presses from the users of a specific handset. For example - The user presses 1, but no digits are captured.
- Duplicate digits appear in a few cases. For example - The user presses ‘12345’, but the digits captured are ‘123455’
- A few digits are missing. For example - The user presses ‘12345’, but the digits captured are like ‘1345’
- Digits are recognized wrongly. For example, the user presses ‘12345’, but the digits captured appear like ‘22345’. In the rarest of rare cases, the alphabet (A, B, C, D) can also appear instead of digits as they are part of the DTMF tones.

Possible reasons why DTMF is not captured correctly:

- Handset Issues: The handset is not sending the DTMF tones correctly over the telephony lines. This could be because of the settings in the handset, manufacturing defect, speaker/earphone mode, etc.
- Carrier Issues: One or more carriers involved during the transmission of DTMF tones fail to transmit it properly (This could be due to a combination of the handset, operators, location/cell towers involved).
- Environmental Factors: Any factor which can cause sound (DTMF tone) to be altered or lost, such as background noise, poor reception, poor audio quality, etc. can make it difficult to distinguish the DTMF tones, or can also lead to duplicate tones being detected (if a noise chops a single DTMF sound into two parts).
- User Behaviour: Problems might arise if a user provides DTMF key inputs in mute or speaker mode. It may also be because the user presses the keys too quickly for the DTMF to be interpreted.

Few other observations with regard to DTMF capture

- The use of the hash '#' key -
 - Most Android diallers don't pick it up automatically i.e. although the app/link is programmed to pass VN, digits# the dialler only gets VN, digits (without the hash). Here, VN = Virtual Number = ExoPhone
 - The solution is to use %23 instead of # in your application/link. Ex: VN,digits%23
- The digits NOT showing up on the dialler, once the preprogrammed VN, digits# tuple is triggered
 - This could be device specific or Android version-specific issue. It is observed that when the user clicks on the VN, digits# tuple, only the ExoPhone showed up on their dialler screen. (Ex: Lenovo Vibe P1m, Motorola G3 etc.)
- In some Android devices, the DTMF input tone is not “heard” after the tuple is triggered
 - Practically speaking, the user interprets this as a gap in the process where 'nothing is happening' (given that there is no noise from when the tuple is triggered to the time the DTMF input fully finishes) and either disconnects or tries typing in the digits themselves.
- Toggling dial pad tone on/off can affect the way DTMF inputs are captured
 - Unfortunately, there's no straightforward way to know exactly how each and every device brand, make/model would behave if the dial pad tone were not switched on, as we did identify instances where even when the dial pad tone was switched-off, DTMF inputs were captured and in cases where they weren't.

- Toggling the 'mute' option during the call run can impact the way DTMF inputs get captured
 - Behaviour to differ when the VN, digits# tuple is triggered and loudspeaker is enabled/disabled, whilst toggling a mute option
- Noise cancellation that's handled by a device can have an impact on how / what DTMF inputs are passed from device to operator and from operator to our platform.
- DTMF issues can be more prominent in the networks where there is an intermixing of IP network and pure PSTN (Public switched telephone network) network. In India, most of the calls use both networks, hence issues with DTMF capture might be more.

Actions to take if an issue is observed:

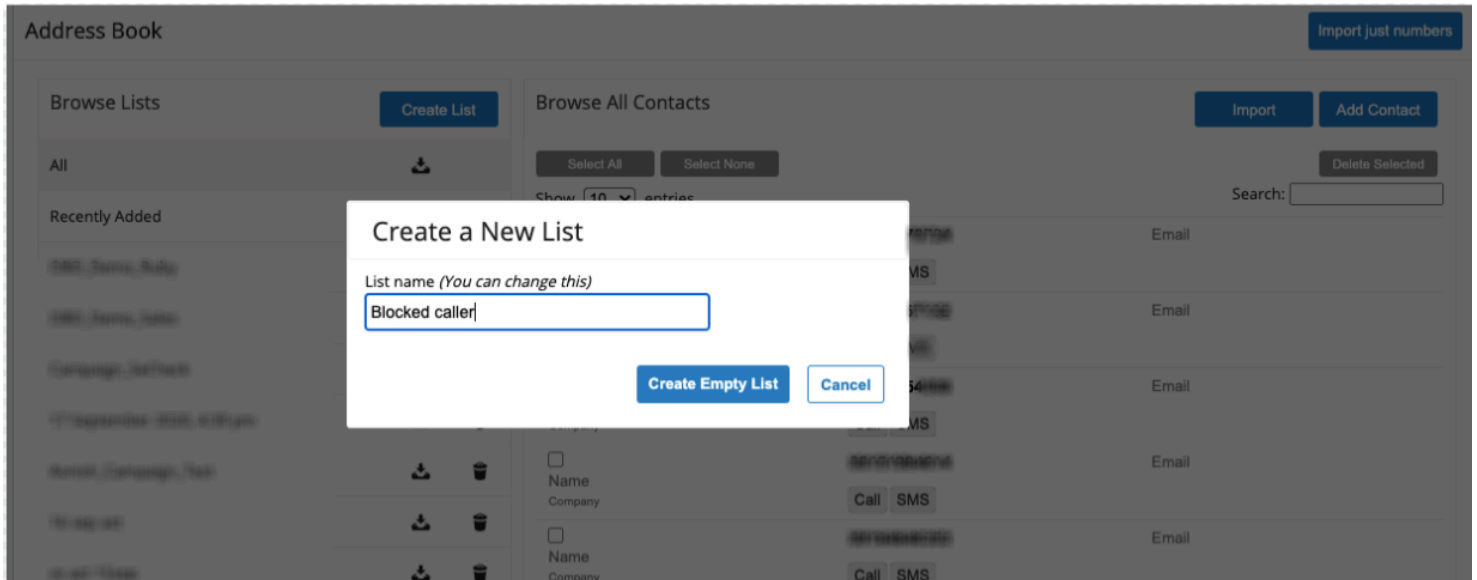
- We suggest that if the issue is happening continuously, but only on particular phones from a particular carrier, you might want to contact that carrier or the handset manufacturer directly to report the issue. If the issue is happening intermittently, it may be due to environmental factors or any other intermittent occurrence of the reasons mentioned above.
- For troubleshooting, there is no single test that can be done to definitively determine where a problem with DTMF comes from. The best approach to take is to perform various scenarios possible to isolate the issue. For cases where such an issue is occurring repeatedly for specific users, tests can be conducted which require the end-users to try the same SIM card on a different handset and/or try a different SIM card (or carrier) on the same handset. This will help isolate if the issue is with the handset or the SIM provider (carrier).
- You can also attempt to make calls to capture DTMF digits using an alternate region's ExoPhone to isolate if it's occurring across different network combinations.
- You can configure your handset settings to enable DTMF tones, try different modes (speaker, normal, earphones), turn off mute if enabled, etc.
- While there isn't a permanent solution to fix all of DTMF constraints given that there are different possible reasons (viz. noise, user, handset, operators), do write to us at hello@exotel.in with your inquiries on this, specifically, if you are observing such issues continuously across multiple handsets. We can also assist you to explore alternate solutions based on your use case.
- Best Practice: We recommend using a shorter extension (3 or 4 digits) as opposed to longer ones (7 to 10 or more) given that the deviation that we've observed is higher in the case of long extensions. Also, the probability of anomaly occurring in the input increases as the number of DTMF inputs increases.

NOTE: Please make sure your application endpoint is capturing the "digits" parameter correctly while using the IVR or the gather applet. If you are using passthru, it should be placed immediately after the 'Gather' applet.

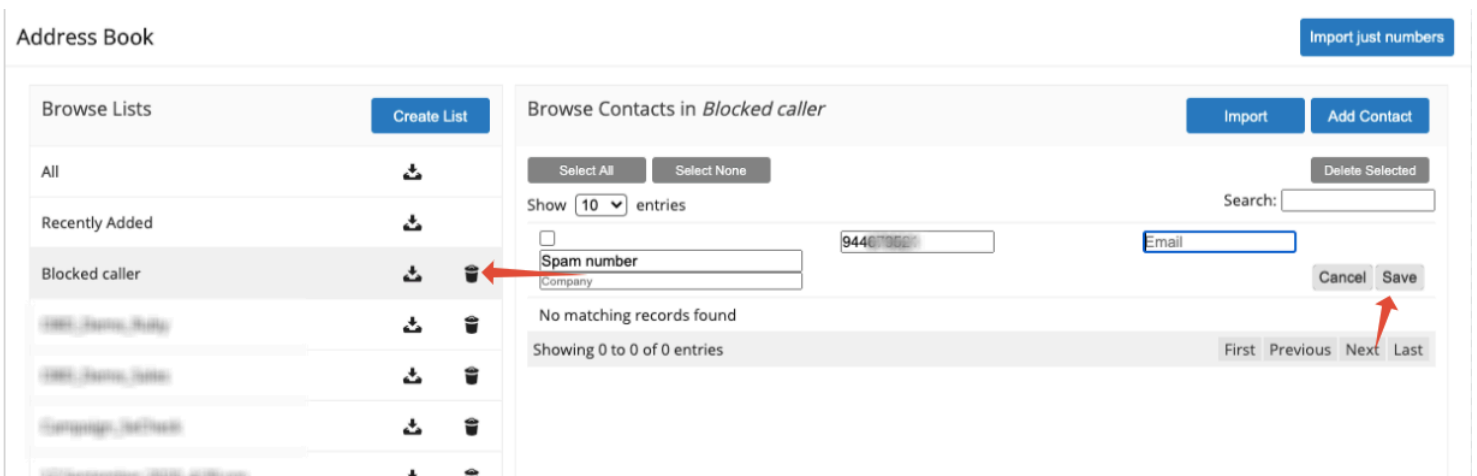
7.8. Block Calls

How do I block calls from a specific number?

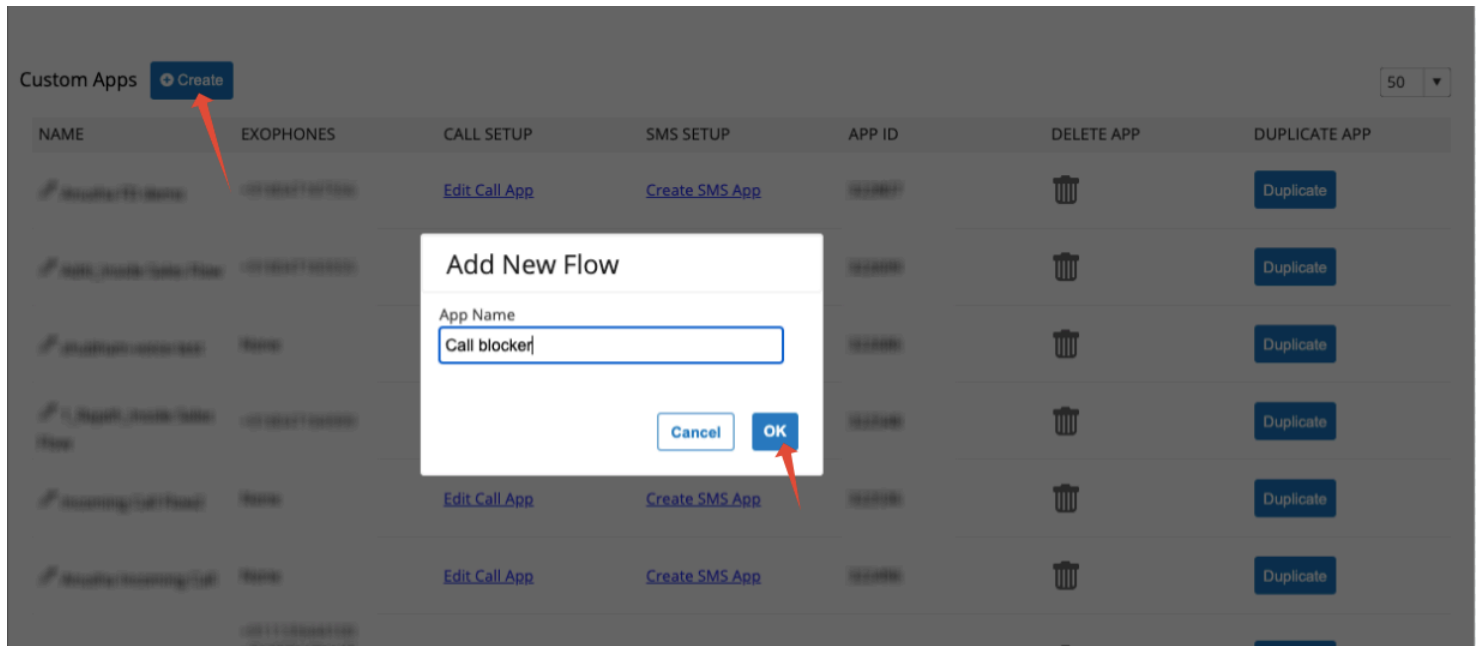
Step 1. Create an empty list called "Blocked Callers" in the Address Book Section.



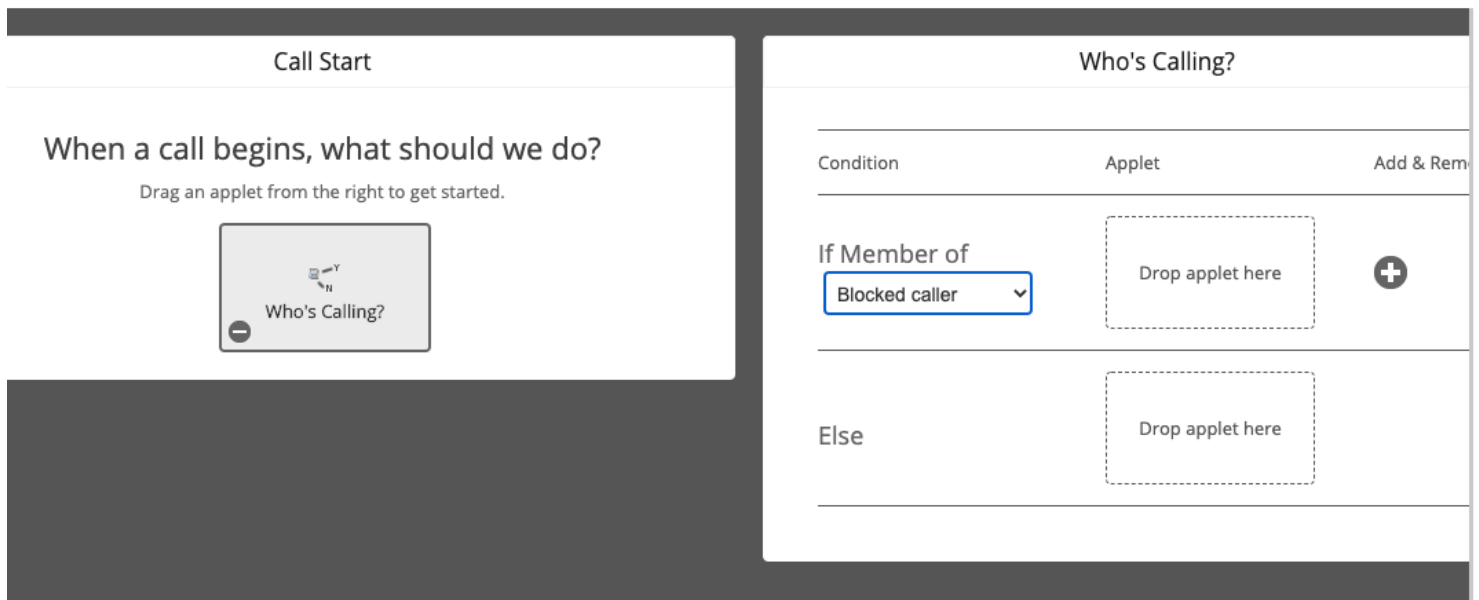
Step 2. Select the newly created list and then add the number(s) that you wish to block the calls from and save it.



Step 3. Create an app called "Call blocker" (You can use any name) in the App bazaar section.



Step 4. In the newly created app (call flow), use the "Who's Calling" applet and choose "Blocked Callers" as the list.



Step 5. Now, ask Exotel to "hangup" calls if the caller belongs to the "Blocked Callers" list. Else, "Transfer" the call to your usual flow.

Call Start

When a call begins, what should we do?

Drag an applet from the right to get started.

Who's Calling?

Who's Calling?

Condition	Applet	Add & Remove
If Member of Blocked caller	Hangup	+
Else	Transfer	

Step 6. Under the ExoPhones section, you need to assign your ExoPhone to this newly created app in order to do the checking first.

Now, as and when you find prank or spam callers, add their number to the "Blocked Callers" list from your address book page and then the call will be disconnected when a call is received from those numbers.

7.9. Call Voicemail

When Creating a Call flow you can set up your flow to give your callers the option of leaving a voicemail in case none of your agents are able to answer the call.

Also see [Voicemail Applet](#)

Aloha, 09740267950

ON

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Credits:

Greet my callers with...

Type Text
to read like a robot
or to get it
recorded

Upload
WAV or MP3 audio
file

Record
using a phone

Choose
from your library

After greeting, connect the caller to...

Select a User or Group

After connecting caller, pick an agent...

☒ evenly from the list

☐ in the order they appear in the list

Then send an email to...

Do not choose any user/group to not send an email

Select a User or Group

If nobody answered the call ask the caller to leave a voicemail. Then send an email to...

Do not choose any user/group to not send an email

Select a User or Group

It helps you handle multiple calls on your ExoPhone and routes the calls to a user or a group of users in your team.

Greet
Greet your caller

Connect
Connect the call to a user or group

Call Queuing
In case one or more of your agents are busy on a Exotel call, the caller will be queued

Voicemail
In case the all your agents are not answering the call ask the caller to leave a voicemail

Email
Send you an email after the call

Install

In case you'd like your callers to leave a voicemail in any other specific instance, you can use the App Builder to create a custom flow.

exotel

test

Save

Close

Call Start

call begins, what should we do?

tag an applet from the right to get started.

Greeting

Greeting

Audio Choice

When the caller reaches this prompt, they will hear:

Read Text
TEST
edit

Next

After the initial prompt, continue to the next applet

Drop applet here

Voice Applets

Greeting

New Call

Connect

Voicemail

Email

IVR Menu

Hangup

Timing

Gather

Passthru

You can use the [Voicemail Applet](#) at any point in the flow to allow the callers to leave a voicemail.

Where are callers' voicemails stored in my Exotel account?

All of your voicemails are stored in the Exotel inbox.

To locate voicemails, go to your search bar on the top right and select Call Type as "Voicemail". You can even specify other details like Period, ExoPhone, Agent etc. to narrow down your search.

The screenshot displays the Exotel Business Phone System interface. On the left, there is a sidebar with navigation options: LIVE, Dashboard, CALLS, Inbox, Support_Number_IV, Support and Sales, Support Misc Hindi, Support and Sales, Rachana, SMS, Outbox, TOOLS, Campaigns, CONTACTS, Address book, and Co-workers and Groups. The main area shows a list of calls with columns for Select, Delete, and a list of 25 items. A search bar at the top right contains the text 'call_type:voicemail'. A dropdown menu is open, showing filter options: Call time period (All), ExoPhone (Select your option...), Call Direction (All), Call Type (Voicemail x), and a list of checkboxes for Call Type: Callback(S), Outbound, Voicemail (checked), Client-Hangup, and Agent-Hangup. A 'Search' button is visible at the bottom of the dropdown.

All your voicemails will be displayed with details like the Date & Time of call and the recording.

The icon highlighted in the Call Type section in the above image indicates a voicemail. You can use this to identify voicemails in your inbox.

7.10. Call Quality Pop-up

You may observe pop-ups like above on the Exotel dashboard asking for your feedback on the call quality. This is to understand how was the audio quality of the call conversation you just had.

The rating would be on a scale of 5 stars (similar to MOS Score), with one star meaning it is of bad quality and five stars being excellent quality. In case the rating is below 4 stars, we would want to understand the reason behind it and you can choose one of the following options:

- **Could not hear:** This means that you or the other person could not hear each other during the call.
- **Call dropped:** This would mean that the call abruptly got disconnected during the conversation (either call drops is for network error or the other person dint hear and disconnected the call).
- **Poor audio quality:** This would mean that you could hear each other but the audio perceived was of poor quality i.e. there was noise, echo, low volume or any other kind of disturbance.
- **Other:** If your reason for poor call quality doesn't fit in the above reasons, please select this.

Your feedback will improve our ability to serve you better.

In case of any issue related to the pop-up, please write to hello@exotel.com

Do note, call quality problems could exist due to some issues at your end as well (handset, network coverage etc.). Refer to this article for few tips on improving call quality at your end.

7.11. Call Cause Codes

Cause codes provide granular information about a call status to help you understand what happened with a call. These cause codes are primarily derived by Exotel as per the operators. These are currently exposed via our Passthru applet.

Cause codes ranging from 1-127 are as per the ISDN standard.

Cause Code	Text	Description
1 UNALLOCATED_NUMBER	Unallocated (unassigned) number	This cause indicates that the destination requested by the calling user cannot be reached because, though the number is in a valid format, it is not currently assigned (allocated).
2 NO_ROUTE_TO_NETWORK	No route to specified transit network	This cause indicates that the equipment sending this cause has received a request to route the call through a particular transit network that it does not recognize. This could be because the transit network does not exist or because that particular transit network does not serve the equipment which is sending this cause.
3 NO_ROUTE_TO_DESTINATION	No route to destination	This cause indicates that the called party cannot be reached because the network through which the call has been routed does not serve the destination desired. This cause is supported on a network-dependent basis.
4 SPECIAL_INFORMATION_TONE	send special information tone	This cause indicates that the called party cannot be reached for reasons that are of a long-term nature and that the special information tone should be returned to the calling party.
5 MISDIALED_TRUNK_PREFIX	misdialed trunk prefix	This cause indicates the erroneous inclusion of a trunk prefix in the called party number. This number is to snipe from the dialed number being sent to the network by the customer premises equipment.
6 CHANNEL_UNACCEPTABLE	channel unacceptable	This cause indicates that the channel most recently identified is not acceptable to the sending entity for use in this call.
7 CALL_AWARDED_ESTABLISHED_CHANNEL	call awarded. being delivered in an established channel	This cause indicates that the user has been awarded the incoming call and that the incoming call is being connected to a channel already established to that user for similar calls (e.g. packet-mode x.25 virtual calls).
8 PREEMPTION	preemption	This cause indicates the call is being preempted.
9 PREEMPTION_REUSE	preemption - circuit reserved for reuse	This cause indicates that the call is being preempted and the circuit is reserved for reuse by the preempting exchange.
16 NORMAL_CLEARING	normal call clearing	This cause indicates that the call is being cleared because one of the users involved in the call has requested that the call be cleared. This could mean - Telephone line problems. - Hung session on the remote end.
17 USER_BUSY	User busy	This cause is used to indicate that the called party is unable to accept another call because the user's busy condition has been encountered. This cause value may be generated by the called user or by the network. In the case of user-determined user busy, it is noted that the user equipment is compatible with the call.

Cause Code	Text	Description
18 NO_USER_RESPONDING	no user responding	This cause is used when a called party does not respond to a call establishment message with either an alerting or connect indication within the prescribed period of time allocated.
19 NO_ANSWER	no answer from the user	This cause is used when the called party has been alerted but does not respond with a connect indication within a prescribed period of time. Note - This cause is not necessarily generated by Q.931 procedures but may be generated by internal network timers.
20 SUBSCRIBER_ABSENT	subscriber absent	This cause value is used when a mobile station has logged off. Radio contact is not obtained with a mobile station or if a personal telecommunication user is temporarily not addressable at any user-network interface
21 CALL_REJECTED	call rejected	This cause indicates that the equipment sending this cause does not wish to accept this call. although it could have accepted the call because the equipment sending this cause is neither busy nor incompatible. This cause may also be generated by the network, indicating that the call was cleared due to a supplementary service constraint. The diagnostic field may contain additional information about the supplementary service and the reason for rejection.
22 NUMBER_CHANGED	number changed	This cause is returned to a calling party when the called party number indicated by the calling party is no longer assigned. The new called party number may optionally be included in the diagnostic field. If a network does not support this cause, cause no. 1, unallocated (unassigned) number shall be used
26 NON_SELECTED_USER_CLEARING	non-selected user clearing	This cause indicates that the user has not been awarded the incoming call.
27 DESTINATION_OUT_OF_ORDER	destination out of order	This cause indicates that the destination indicated by the user cannot be reached because the interface to the destination is not functioning correctly. The term "not functioning correctly" indicates that a signal message was unable to be delivered to the remote party; e.g., a physical layer or data link layer failure at the remote party or user equipment off-line.
28 INVALID_NUMBER_FORMAT	invalid number format	This cause indicates that the called party cannot be reached because the called party number is not in a valid format or is not complete
29 FACILITIES_REJECTED	facilities rejected	This cause is returned when a supplementary service requested by the user cannot be provided by the network
30 STATUS_INQUIRY_RESPONSE	response to STATUS INQUIRY	This cause is included in the STATUS message when the reason for generating the STATUS message was the prior receipt of a STATUS INQUIRY.
31 NORMAL_UNSPECIFIED	normal. unspecified	This cause is used to report a normal event only when no other cause in the normal class applies
34 NO_CHANNEL_AVAILABLE	no circuit/channel available	This cause indicates that there is no appropriate circuit/channel presently available to handle the call.

Cause Code	Cause Code	Text	Description
35	CALL_QUEUED	Call Queued	
38	NETWORK_OUT_OF_ORDER	network out of order.	This cause indicates that the network is not functioning correctly and that the condition is likely to last a relatively long period of time e.g., immediately re-attempting the call is not likely to be successful
39	CONNECTION_OUT_OF_SERVICE	permanent frame mode connection out-of-service	This cause is included in a STATUS message to indicate that a permanently established frame mode connection is out-of-service (e.g. due to equipment or section failure)
40	CONNECTION_OPERATIONAL	permanent frame mode connection operational	This cause is included in a STATUS message to indicate that a permanently established frame mode connection is operational and capable of carrying user information
41	TEMPORARY_FAILURE	temporary failure	This cause indicates that the network is not functioning correctly and that the condition is not likely to last a long period of time; e.g., the user may wish to try another call attempt almost immediately.
42	SWITCHING_EQUIPMENT_CONGESTION	switching equipment congestion	This cause indicates that the switching equipment generating this cause is experiencing a period of high traffic
43	ACCESS_INFORMATION_DISCARDED	access information discarded	This cause indicates that the network could not deliver access information to the remote user as requested i.e., user-to-user information, low layer compatibility, high layer compatibility, or sub-address as indicated in the diagnostic. It is noted that the particular type of access information discarded is optionally included in the diagnostic
44	CHANNEL_NOT_AVAILABLE	requested circuit/channel not available	This cause is returned when the circuit or channel indicated by the requesting entity cannot be provided by the other side of the interface
46	PRECEDENCE_CALL_BLOCKED	precedence call blocked	This cause indicates that there are no predictable circuits or that the dialed user is busy with a call of equal or higher preventable level
47	RESOURCE_UNAVAILABLE	resource unavailable, unspecified	This cause is used to report a resource unavailable event only when no other cause in the resource unavailable class applies
49	QOS_NOT_AVAILABLE	Quality of Service not available	This cause is used to report the requested Quality of Service, as defined in Recommendation X.213. cannot be provided (e.g., the throughput of transit delay cannot be supported)
50	FACILITY_NOT_SUBSCRIBED	requested facility not subscribed	This cause indicates that the user has requested a supplementary service which is implemented by the equipment which generated this cause but the user is not authorized to use

Cause Code	Cause Code	Text	Description
			The switch looks at the number being dialed and thinks it is for another service rather than ISDN. If the phone number is put in the correct format, the call should be placed properly. There are no standards for this, all Telcos have their own system for programming the number formats that the switches will recognize. Some systems want to see 7 digits, some 10, and others 11.
52	OUTGOING_CALLS_BARRED	outgoing calls barred	
53	OUTGOING_CALLS_BARRED_CUG	outgoing calls barred within CUG	This cause indicates that although the calling party is a member of the CUG for the outgoing CUG call. Outgoing calls are not allowed for this member of the CUG
54	INCOMING_CALLS_BARRED	incoming calls barred	
55	INCOMING_CALLS_BARRED_CUG	incoming calls barred within CUG	This cause indicates that although the calling party is a member of the CUG for the incoming CUG call. Incoming calls are not allowed for this member of the CUG
57	BEARER_CAPABILITY_NOT_AUTHORIZED	bearer capability not authorized	This cause indicates that the user has requested a bearer capability which is implemented by the equipment which generated this cause but the user is not authorized to use
58	BEARER_CAPABILITY_NOT_AVAILABLE	bearer capability is not presently available	This cause indicates that the user has requested a bearer capability which is implemented by the equipment which generated this cause but which is not available at this time
62	INCONSISTENCY_OUTGOING_INFORMATION_ELEMENT	inconsistency in the outgoing information element	This cause indicates an inconsistency in the designated outgoing access information and subscriber class
63	SERVICE_NOT_AVAILABLE	service or option not available. unspecified.	This cause is used to report a service or option not available event only when no other cause in the service or option not available class applies
65	BEARER_CAPABILITY_NOT_IMPLEMENTED	bearer capability not implemented	This cause indicates that the equipment sending this cause does not support the bearer capability requested. What it means: 1. In most cases, the number being called is not an ISDN number but an analog destination. 2. The equipment is dialing at a faster rate than the circuitry allows, for example, dialing at 64K when only 56K is supported

Cause Code	Cause Code	Text	Description
66	CHANNEL_TYPE_NOT_IMPLEMENTED	channel type not implemented	This cause indicates that the equipment sending this cause does not support the channel type requested
69	FACILITY_NOT_IMPLEMENTED	requested facility not implemented	This cause indicates that the equipment sending this cause does not support the requested supplementary services
70	RESTRICTED_BEARER_CAPABILITY_AVAILABLE	only restricted digital information bearer capability is available	This cause indicates that the calling party has requested an unrestricted bearer service but the equipment sending this cause only supports the restricted version of the requested bearer capability
79	SERVICE_NOT_IMPLEMENTED	service or option not implemented unspecified	This cause is used to report a service or option not implemented event only when no other cause in the service or option not implemented class applies
81	INVALID_CALL_REFERENCE_VALUE	invalid call reference value	This cause indicates that the equipment sending this cause has received a message with a call reference that is not currently in use on the user-network interface.
82	CHANNEL_DOES_NOT_EXIST	identified channel does not exist	This cause indicates that the equipment sending this cause has received a request to use a channel not activated on the interface for a call. For example, if a user has subscribed to those channels on a primary rate interface numbered from 1 to 12 and the user equipment or the network attempts to use channels 3 through 23, this cause is generated.
83	SUSPENDED_CALL_EXISTS	A suspended call exists, but this call identity does not	This cause indicates that a call resume has been attempted with a call identity that differs from that in use for any presently suspended call(s).
84	CALL_IDENTITY_IN_USE	call identity in use	This cause indicates that the network has received a call suspended request containing a call identity (including the null call identity) that is already in use for a suspended call within the domain of interfaces over which the call might be resumed
85	NO_CALL_SUSPENDED	no call suspended	This cause indicates that the network has received a call resume request containing a call identity information element which presently does not indicate any suspended call within the domain of interfaces over which calls may be resumed
86	CALL_IDENTITY_CLEARED	call having the requested call identity has been cleared	This cause indicates that the network has received a call resume request containing a call identity information element indicating a suspended call that has in the meantime been cleared while suspended (either by network time-out or by the remote user)

Cause Code	Cause Code	Text	Description
87	USER_NOT_MEMBER_OF_CUG	user not a member of CUG	This cause indicates that the called user for the incoming CUG call is not a member of the specified CUG or that the calling user is an ordinary subscriber calling a CUG subscriber.
88	INCOMPATIBLE_DESTINATION	incompatible destination	This cause indicates that the equipment sending this cause has received a request to establish a call that has low layer compatibility, high layer compatibility or other compatibility attributes (e.g., data rate) which cannot be accommodated
90	NON_EXISTENT_CUG	non-existent CUG	This cause indicates that the specified CUG does not exist.
91	INVALID_TRANSIT_NETWORK_SELECTION	invalid transit network selection	This cause indicates that a transit network identification was received which is of an incorrect format as defined in Annex C/Q.931
95	INVALID_MESSAGE	invalid message, unspecified	This cause is used to report an invalid message event only when no other cause in the invalid message class applies.
96	MANDATORY_INFORMATION_ELEMENT_MISSING	mandatory information element is missing	This cause indicates that the equipment sending this cause has received a message which is missing an information element that must be present in the message before that message can be processed
97	MESSAGE_TYPE_NON_EXISTENT_OR_NOT_IMPLEMENTED	message type non-existent or not implemented	This cause indicates that the equipment sending this cause has received a message with a message type it does not recognize either because this is a message not defined or defined but not implemented by the equipment sending this cause
98	MESSAGE_NOT_COMPATIBLE	message not compatible with call state or message type non-existent	This cause indicates that the equipment sending this cause has received a message such that the procedures do not indicate that this is a permissible message to receive while in the call state, or a STATUS message was received indicating an incompatible call state
99	INFO_ELEMENT_NON_EXISTENT_OR_NOT_IMPLEMENTED	Information element / parameter non-existent or not implemented	This cause indicates that the equipment sending this cause has received a message which includes information element(s)/parameter(s) not recognized because the information element(s)/parameter name(s) are not defined or are defined but not implemented by the equipment sending the cause. This cause indicates that the information element(s)/parameter(s) were discarded. However, the information element is not required to be present in the message in order for the equipment sending the cause to process the message
100	INVALID_INFORMATION_ELEMENT	Invalid information	This cause indicates that the equipment sending this cause has received an information element that it has implemented; however, one or more of the fields in the information element are coded in such a way that has not been implemented by the equipment sending this cause

Cause Code	CauseCode	Text	Description
	MENT_CONTENTS	element contents	
101	MESSAGE_NOT_COMPATIBLE_CALL_STATE	message not compatible with call state	This cause indicates that a message has been received which is incompatible with the call state.
102	RECOVERY_ON_TIMER_EXPIRY	recovery on timer expiry	This cause indicates that a procedure has been initiated by the expiration of a timer in association with error handling procedures
103	PARAMETER_NON_EXISTENT	parameter non-existent or not implemented - passed on	This cause indicates that the equipment sending this cause has received a message which includes parameters not recognized because the parameters are not defined or are defined but not implemented by the equipment sending this cause. The cause indicates that the parameter(s) were ignored. In addition, if the equipment sending this cause is an intermediate point, then this cause indicates that the parameter(s) were passed unchanged
110	MESSAGE_WITH_UNRECOGNIZED_PARAMETER	message with unrecognized parameter discarded	This cause indicates that the equipment sending this cause has discarded a received message which includes a parameter that is not recognized
111	PROTOCOL_ERROR	protocol error, unspecified	This cause is used to report a protocol error event only when no other cause in the protocol error class applies
127	INTEL_WORKING	Intel-working, unspecified	This cause indicates that an interworking call (usually a call to 5W56 service) has ended

Notes about Cause Codes over 128: According to the ISDN spec “Cause code values of 128 and higher aren't sent over the network. A terminal displaying a value 128 or higher and claiming it is a cause code arguably has a bug or is implementing some proprietary diagnostic code (not necessarily bad). Some commendation has cause codes listed with numbers higher than 128, but at this time they are proprietary in nature.”

Cause codes ranging beyond 1000 are constructed by Exotel based on certain scenarios

Cause	CauseCode	Text	Description
1001 (maps to ISDN code 16)	NORMAL_CLEARING	Normal Clearing	The call is being cleared by Exotel because one of the users involved in the call has requested that the call be cleared (hangup) or we have nothing to execute for the call.
1002 (maps to ISDN code 21)	CALL_REJECTED	Call Rejected	The call is being rejected by Exotel. This is usually sent when the call was not answered and an explicit hangup was specified in the flow
1003 (maps to AHN code 130)	RING_TIMEOUT	Ring Timeout	The call is being cleared by Exotel while ringing because of the explicit timeout specified for the leg
1004 (maps to AHN code 131)	CONNECT_TIMEOUT	Connect Timeout	The call is being cleared by Exotel while connecting because of the explicit timeout specified for the leg
1005	CALL_THROTTLED	Call Throttled	If a call is throttled by Exotel as the number of call requests per minute exceeded the allowed value for your account.
1006	CALL_REJECTED_DND	Incoming promotional calls are barred due to DND preference of the user	This cause indicates that the incoming calls to the number are blocked due to the DND preference of the user. This cause code is not yet populated in the case of the Passthru applet.

7.12. Parallel Ringing



HTML & iframes are not visible in the CMS

For security reasons, iframe and HTML blocks are only rendered on your published documentation site, not in the Content Management System.

Parallel ringing or simultaneous ringing enables businesses to automatically redirect incoming calls to a maximum of 5 agents at the same time.

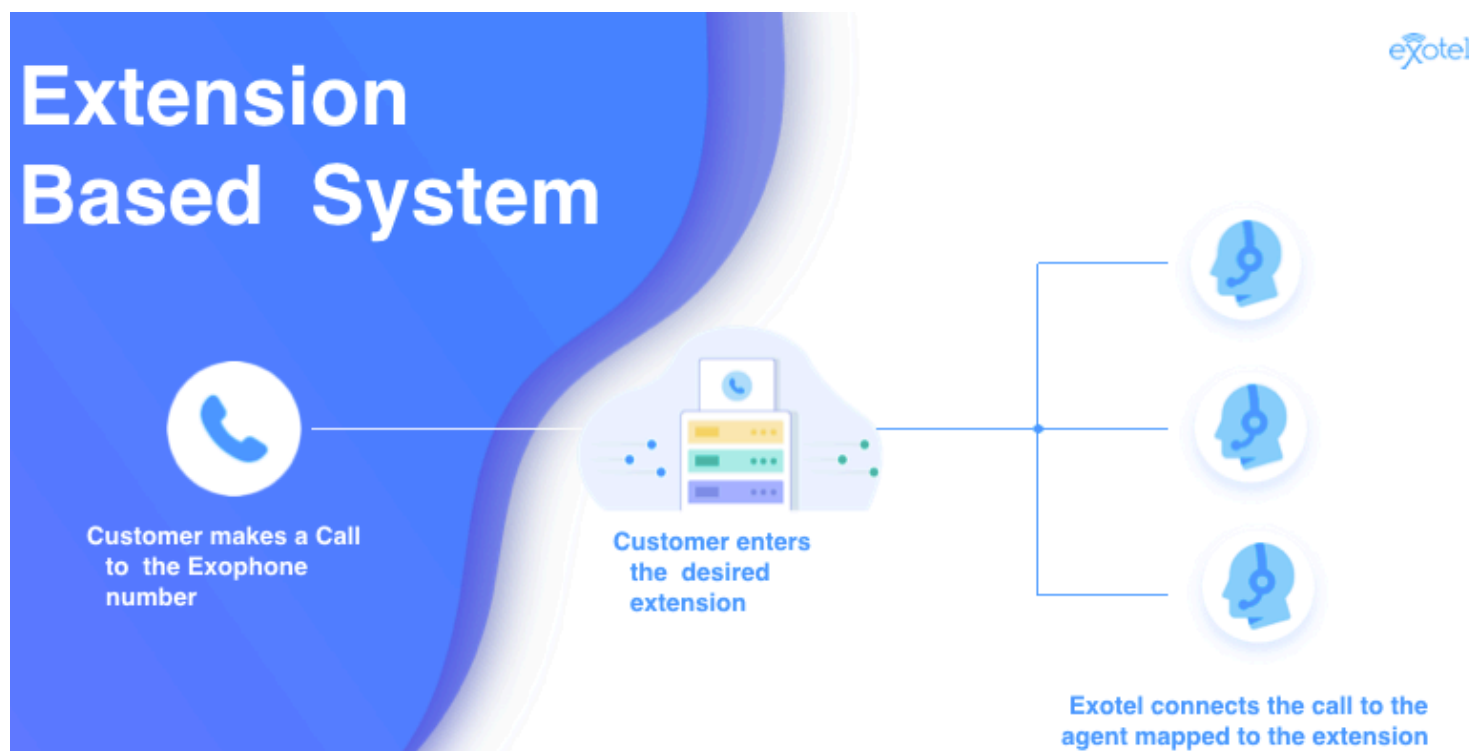
This means that when an incoming call land on the [Connect Applet](#), Exotel dials out to five of the available agents at once.

This ensures quicker response as the customer will more often than not, find an agent to talk to, thereby improving the customer experience, while also circumventing the issues that may be caused due to intermittent network issues that might occur on an agent's phone (For example, low network connectivity).

Once an agent answers the call, the other phones will automatically stop ringing. This is beneficial, especially for businesses with a customer-facing team.

7.13. Extension Based Call Routing

Providing callers with dedicated extensions allowing them to quickly connect with a specific user/agent.



Advantages of Extension Based Dialing:

- **Add professionalism** to your customer experience
- Make your business look bigger with extensions for separate departments.
- Distribute the calls evenly to team members or to the next available Agent with **customizable call routing extensions**.
- It **adds a structure** to your support or Sales operations.
- Identify customers calling from unregistered numbers and provide them with a **seamless support/service experience**
- **Automate number masking** for the last mile delivery. Delivery Partner can enter the order ID and get connected to the respective customer.
- Spend less on Numbers and allocate PINs to your vendors/Consultants. **Extremely cost-efficient** in Marketplace uses cases(One to many connects)
- **Dedicated Relationship/Account Managers** can be connected based on their allocated PIN.

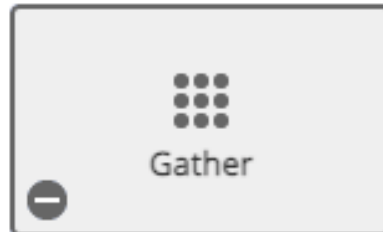
Sample Call Flow

Steps: Goto to App bazaar > Click on create > Enter the flow name.

Call Start

When a call begins, what should we do?

Drag an applet from the right to get started.



Gather prompt

When the caller reaches this menu they will hear:

Read Text

Please enter the Extension followed by #.

[edit](#)

Specify Key input behaviour

Finish Key 

Finish after user enters this key

#

Maximum Number of Digits 

Finish after user enters these many number of input digits

127 digit(s). Default = 127

Specify the input timeout

Wait for the caller to press another digit (First input included) for.. 

5 secs. Default = 5 secs

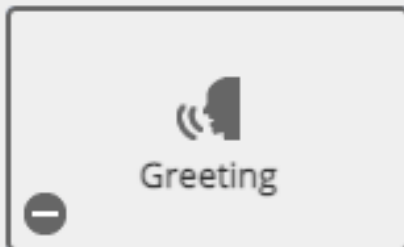
When the caller entered one or more input digits... ?

Redirect the caller to below applet.



When the caller didn't enter anything after the menu... ?

Redirect the caller to below applet.



Dial Whom

☐ Dial a user or group

Select a Group

☐ Dial phone number(s):

DND Check

*Like 08088919888
or a comma separated list like 08088919888,08049114900*

Note: Calls to DND number will be blocked if it is not whitelisted
[How to Whitelist DND numbers](#)

☐ Dial phone number(s) returned by URL:

Primary URL:

https://script.google.com/macros/s/AKfycbwn1

☒ Fallback URL(Optional):

☒ Fetch numbers after every call attempt

[Click here](#) for the list of parameters

Implementation

Applets to be used :

- Gather
- Connect

The **Gather Applet** helps in reading out a customary greeting and collecting the DTMF codes punched in by your caller.

The **Connect applet** is used to connect the caller and the callee. In the Connect applet, you have a section “Dial a number returned by this URL” Here, you will need to host a URL that returns the phone number of that particular vendor with whom the caller wants to get in touch. If the correct phone number has been returned, then the call will get connected successfully.

Creating the Flow:

- Once you have logged in to your Exotel dashboard, please go to App Bazaar.
- Create a new call flow by clicking on Custom Apps Create. This will open up the app builder page.
- Drag and drop the Gather Applet.
- Drag and drop the Connect Applet.
- Use the web app URL that was created earlier in the Connect applet.
- Drag and drop any other applet you need.
- Save the flow.

Based on the extension entered by the user, the corresponding number in the spreadsheet will be returned by the URL which in turn will be called by Exotel. Assign an Exophone to the newly created flow.

How to implement Extension-Based Routing using Exotel and spreadsheets?

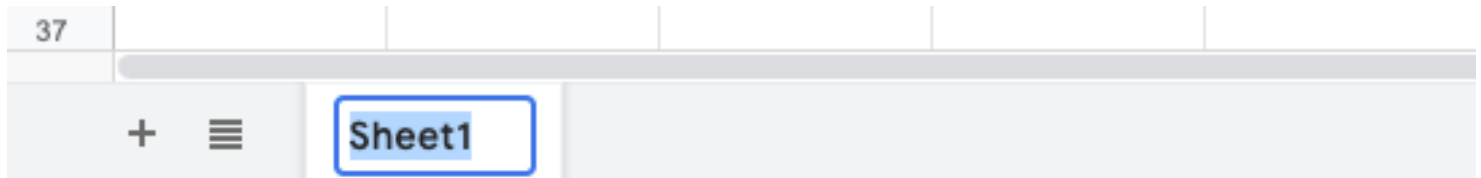
- Open a new spreadsheet.
- Upload the below code in the script editor of the spreadsheet.
- Publish the code to get a web app URL.
- Once deployed, copy the web app URL which will be used later in the Exotel flow.
- Open your Exotel account and create the flow below in the App Builder.

```
//Id of the spreadsheet
//for spreadsheet https://docs.google.com/spreadsheets/d/1BsalnnI5_yBRke6brwk5G54Qwm5dgonN_YnLXJa"
// has id as 1eWE19ZxDtnTdeffChVCGGYtNQhrmgrRphAUB709-QIc
var ID = "1eWE19ZxDtnTdeffChVCGGYtNQhrmgrRphAUB709-QIc"
//Nme of the specific sheet inside the spreadsheet where data to be dumped
var SHEET_NAME = "Sheet1"
//Name of the specific sheet inside the spreadsheet where numbers are available
function doGet(e) {
    var params = e.parameters;
    var abc = e.parameters["digits"][0]
    var output = retrieveData(abc)
    return ContentService.createTextOutput(output)
}
//retrieveData : Function to retrieve data from sheet
function retrieveData(paramm) {
    var sheet = SpreadsheetApp.openById(ID).getSheetByName(SHEET_NAME)
    var data = sheet.getDataRange().getValues();
    for (var j in data) {
        if (paramm == data[j][0]) {
            return data[j][1]
        }
    }
    return "NO DATA FOUND"
}
```

Process the Excel Sheet



Replace the Sheet ID (var ID) from the URL as in the screenshot below-



Replace the Sheet Name (var SHEET_NAME) from the sheet as in the screenshot below-

Deploy the script as a web app

Once the script is done, select the menu item Publish > Deploy as web app. A window will pop up on your screen.

- Under Project Version, type the name of the project.
- Under Execute the app as a section, select Me (Email).
- Under Who has access to the app, select Anyone, even anonymous. This helps make the web app accessible to Exotel.
- You can then click on Deploy to get the web app URL, which can be used in the Exotel flow.

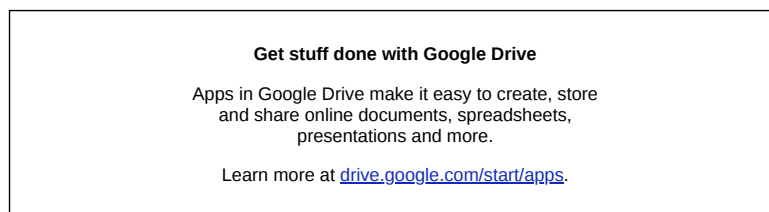
Use the Webhook created in the call flow, in the connect applet.

Sample Spreadsheet



Sorry, the file you have requested has been deleted.

Make sure that you have the correct URL and the owner of the file hasn't deleted it.



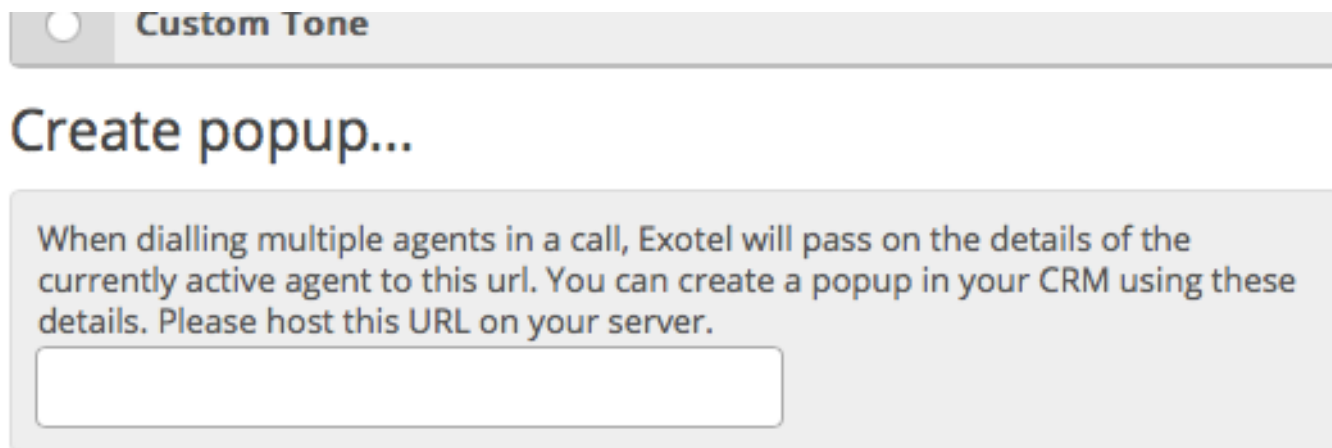
7.14. Answered/Ringing event in CRM

Today Exotel gives status callbacks when the call reaches terminal event when used for Outbound connecting two numbers and when used in Connect Applet Exotel gives status callback for Dial and Terminal event. Now Exotel powers Answered and Ringing event as an intermediate state when the agent/customer is ringing or picking up the call so that more definitive action can be taken on the call in the CRMs (Like assigning a ticket to the agent, etc.)

How to get answered event in CRM

1. Using Connect Applet

The agent pass-through is a part of the 'Connect' applet.



When configured with a URL, Exotel will pass on to that URL details of the agent who is currently being called. It makes a GET request to the URL with the following query parameters:

PARAMETER NAME	VALUE
CallSid	string; unique identifier of the call
CallFrom	string; the number of the calling party
CallTo	string; The callerID the customer had called to. This will be the Exotel VN associated with the flow
Direction	string; This is the direction of the call. For connect applet, this shall say "outbound-dial"
Created	Time; The time when the event created
From	string; the number of the calling party
To	string; The callerID the customer had called to. This will be the Exotel VN associated with the flow
CurrentTime	Time; Time when the event was fired
DialWhomNumber	string; This is the agent's number being dialed by Exotel for this attempt
Status	busy/free. This is sent as 'busy' when the above agent is being called. It is sent as 'free' when the call to the above agent ends (either the call ends, the call didn't go through, or the agent didn't pick up the phone).
EventType	string, This shall have values of " Dial", "Ringing", "Answered", "Terminal".

NOTE: To get answered event in the connect applet, this needs to be enabled by Exotel for your account

2. Using Outbound API connecting agent to customer

NOTE: Please refer to this to understand the connect API in detail <https://developer.exotel.com/api/#call-agent>

While using the API, one can subscribe now for more event types and specify in the below parameter in the API request

StatusCallback	Optional	String; An HTTP POST request will be made to this URL depending on what events are subscribed using 'StatusCallbackEvents'. Refer here to the complete list of parameters that will be sent to your endpoint
StatusCallbackEvents New	Optional	Array; Call events for which we will send details to the URL as set in the 'StatusCallback' parameter. Can be: 1. terminal - This event will be triggered once the call is over. 2. answered - This event will be triggered for each leg of the call. 3. ringing - This event will be triggered for each leg of the call. If no event is specified, we will send the default parameters as specified here.

When the answered event is subscribed, the Exotel platform shall send a POST request to the status callback URL

A sample request for connecting two numbers via API with the answered event:

```
curl -X POST 'https://<your_API_KEY>:<YOUR_API_TOKEN>@api.exotel.com/v1/Accounts/<Your_account_sid>/Calls/connect.json?From=<From No>&To=<To No>'
```

A sample post request when the first leg is answered:

```
{
  "CallSid": "XXXXXXXXXXXXXXXX",
  "EventType": "answered",
  "DateCreated": "2019-04-08 03:17:59",
  "DateUpdated": "2019-04-08 03:18:35",
  "EventTime": "2019-04-08 03:18:35",
  "Status": "no-answer",
  "To": "+91886799XXXX",
  "From": "+91941374XXXX",
  "PhoneNumberSid": "0113083XXXX",
  "StartTime": "2019-04-08 03:17:59",
  "EndTime": "null",
  "Direction": "outbound-api",
  "RecordingUrl": null,
  "ConversationDuration": 32,
  "Legs": [
    {
      "OnCallDuration": null,
      "Status": "in-progress"
    },
    {
      "OnCallDuration": null,
      "Status": "null"
    }
  ]
}
```

A sample example when the second leg is answered:

```
{
  "CallSid": "XXXXXXXXXXXXXXXXXXXX",
  "EventType": "answered",
  "DateCreated": "2019-04-08 03:17:59",
  "DateUpdated": "2019-04-08 03:18:35",
  "EventTime": "2019-04-08 03:18:35",
  "Status": "no-answer",
  "To": "+91886799XXXX",
  "From": "+91941374XXXX",
  "PhoneNumberSid": "0113083XXXX",
  "StartTime": "2019-04-08 03:17:59",
  "EndTime": "null",
  "Direction": "outbound-api",
  "RecordingUrl": null,
  "ConversationDuration": 32,
  "Legs": [
    {
      "OnCallDuration": null,
      "Status": "in-progress"
    },
    {
      "OnCallDuration": null,
      "Status": "in-progress"
    }
  ]
}
```

A sample request for connecting two numbers via API with a ringing event:

```
curl -X POST 'https://<your_API_KEY>:<YOUR_API_TOKEN>@api.exotel.com/v1/Accounts/<Your_account_sid>/Calls/connect.json?From=<From No>&To=<To No>'
```

A sample example is when the first leg is ringing:

```
{
  "CallSid": "09c14403fb2a31097ba5ed64f9251646",
  "EventType": "ringing",
  "DateCreated": "2022-04-06 10:44:40",
  "DateUpdated": "2022-04-06 10:44:41",
  "Status": "in-progress",
  "To": "08780296135",
  "From": "07874762218",
  "PhoneNumberSid": "08044556678",
  "StartTime": "2022-04-06 10:44:41",
  "EndTime": null,
  "EventTime": "2022-04-06 10:44:41",
  "Direction": "outbound-api",
  "RecordingUrl": null,
  "ConversationDuration": null,
  "Legs": [
    {
      "OnCallDuration": null,
      "Status": "in-progress"
    },
    {
      "OnCallDuration": null,
      "Status": null
    }
  ]
}
```

A sample example is when the second leg is ringing:

```
{
  "CallSid": "09c14403fb2a31097ba5ed64f9251646",
  "EventType": "ringing",
  "DateCreated": "2022-04-06 10:44:40",
  "DateUpdated": "2022-04-06 10:44:46",
  "Status": "in-progress",
  "To": "08780296135",
  "From": "07874762218",
  "PhoneNumberSid": "08044556678",
  "StartTime": "2022-04-06 10:44:44",
  "EndTime": null,
  "EventTime": "2022-04-06 10:44:46",
  "Direction": "outbound-api",
  "RecordingUrl": null,
  "ConversationDuration": null,
  "Legs": [
    {
      "OnCallDuration": null,
      "Status": "in-progress"
    },
    {
      "OnCallDuration": null,
      "Status": "in-progress"
    }
  ]
}
```

A sample example of Terminal statuscallback with Ringing Duration:

```
{
  "CallSid": "054cfcd8910389ff64882d8e25211646",
  "EventType": "terminal",
  "DateCreated": "2022-04-06 10:48:00",
  "DateUpdated": "2022-04-06 10:48:16",
  "Status": "completed",
  "To": "08780296135",
  "From": "07874762218",
  "PhoneNumberSid": "08044556678",
  "StartTime": "2022-04-06 10:48:04",
  "EndTime": "2022-04-06 10:48:16",
  "EventTime": "2022-04-06 10:48:16",
  "Direction": "outbound-api",
  "RecordingUrl": "https://s3-us-west-2.amazonaws.com/exotel-us3-recordings/ree5e1us3/054cfcd8910389ff64882d8e25211646.mp3",
  "ConversationDuration": 6,
  "Legs": [
    {
      "OnCallDuration": 12,
      "RingingDuration": 4,
      "Status": "completed"
    },
    {
      "OnCallDuration": 6,
      "RingingDuration": 3,
      "Status": "completed"
    }
  ]
}
```

Note: The ringing event is dependent on the operator and it may not be reported if the operator doesn't provide it in certain cases. If the ringing event is not available then the RingDuration is set as 0.

How to get this enabled for an account?

You can raise a request with hello@exotel.com or reach out to your account managers in Exotel to enable this feature in your account

7.15. Voicebot Integration

Why do we need Voicebot as we already have a bidirectional stream option in the stream applet?

1. As a bi-directional stream's major use case is conversational bot so Voicebot is more appropriate.
2. For ease of understanding and accessibility to the applet use cases without any hassle or to avoid misconfiguration

Who can use Voicebot?

The voice bot applet can be plugged into the flow to replace the agent. As soon as the flow is hit, the voicebot applet will trigger a WebSocket connection with the URL endpoint. Once the connection is established, there will be real-time transmission/streaming of the audio in the same connection.

For instance, It can act as a conversational IVR bot, for example, in a stock trading company where the bot can ask the name of the stock. The customer says the name and the bot can tell the real-time price of it.

How many legs does Voicebot have?

There are two legs

- PSTN leg
- Voicebot leg

What is needed to use Voicebot?

Voicebot needs a custom ws(s) endpoint.

There are two ways to put this:

1. **Static method:** ws(s) endpoint can be entered here but it will remain the same for every call that you gonna make using this flow.

eg: ws://127.0.0.1:5001/media

2. **Dynamic method:** We can enter http(s) URL which can return different ws(s) endpoints based on use case.

eg: https://yourdomain.com this URL must return a ws(s) endpoint

Can we provide custom params along with the endpoint?

Yes, It is optional. There are some validations that need to follow while providing custom params.

1. The Maximum number of custom params that are allowed is 3.
2. Format of these params will like :

ws://127.0.0.1:5001/media?**param1=value1¶m2=value2¶m3=value3**

(In Dynamic case, http(s) should return ws(s) URL in above format)

3. Total length of the params(bold part in above URL) shouldn't be more than 256 characters.

Is there a simulator which can be used to make streaming calls with a dummy bot?

Yes, refer the below GitHub link for the simulator

<https://github.com/exotel/voice-streaming/commit/d4696f3cb13fb5d75ac46bed2aaaa2afababa10f#diff-217ed82f87b78b399e304b07a159b27dff327c0f83adf4a2fc30b03bcbf84b01>

7.16. Audio Library

There are a few pre-recorded good sounding audio files that you can play to your callers. These are generic, does not have any reference to your company name, but is very useful to inform customers about simple things like "Please wait while we connect your call" etc.

The following are the default audio files available for everyone to use:

Name of audio	What it says
Closed Hours	Sorry. We are closed right now. Please call us back later.
Thank you for staying on hold	Thank you for staying on hold. We will answer your call, Shortly.
Leave a voice message	Thank you for calling. Please leave us a voice message after the beep.
All representatives busy	Sorry. All our representatives are busy. Please call us back later.
Recorded for training purposes	This call maybe recorded for internal training purposes.
Invalid option	Sorry. You have entered an invalid option. Please call back again.
All agents busy, please wait	All our agents are busy right now. Please wait while we transfer your call to the next available agent
Thanks for Calling. Please wait	Thank you for calling us. Please wait while we connect your call.

Then there are also audio recordings that are specific to your account. The two ways in which files find a way to your audio library are:

1. Uploading an audio file
2. Using our voice-over recording service

All these private files are available for you to edit, delete & download from your audio library page in "My accounts":

1. Click on My accounts
2. Go to Call Setting > Audio Library.

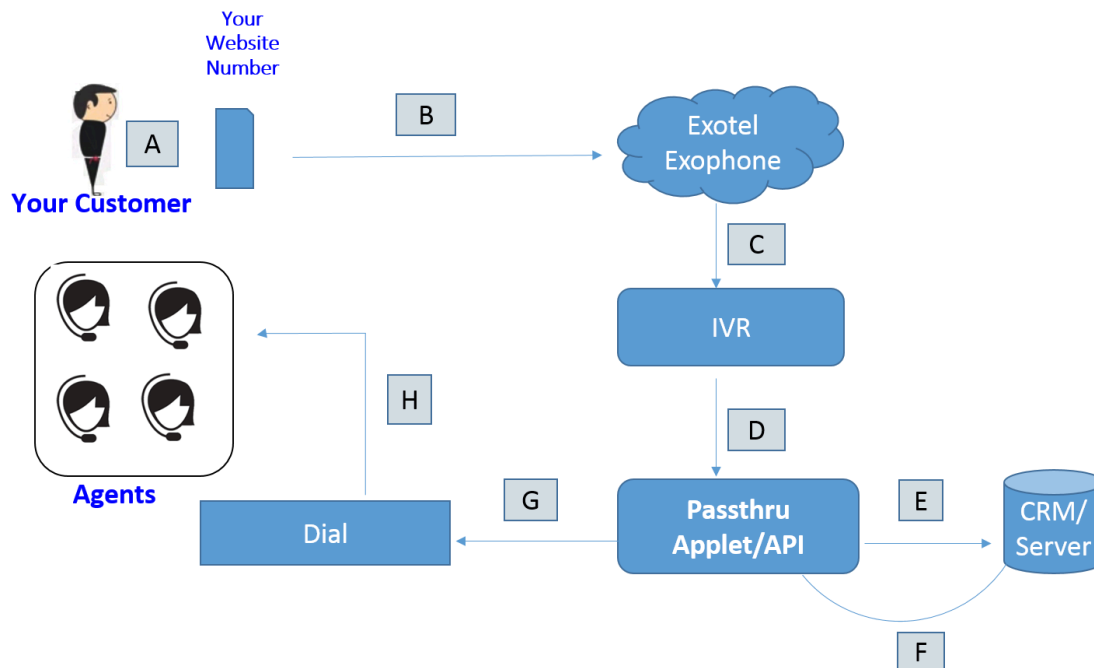
The screenshot shows the eXotel dashboard interface. On the left, there is a sidebar with a 'Settings' menu item highlighted by a red arrow labeled '1'. At the top, there is a navigation bar with tabs for 'Settings', 'SMS Templates', 'Sender ID', 'SMS DLT Settings', 'Audio Library', 'Personalization', and 'Heartbeat'. The 'Audio Library' tab is highlighted by a red arrow labeled '2'. Below the navigation bar, the 'Audio Library' section is displayed, showing a table of audio files. The table has three columns: 'AUDIO FILE NAME', 'DOWNLOAD', and 'ACTIONS'. The table lists several audio files, each with a 'Download' link and playback controls. The first row shows a file named 'Thanks for Calling. Please wait' with a download link and playback controls. The second row shows a file named 'All agents busy, please wait' with a download link and playback controls. The third row shows a file named 'Invalid option' with a download link and playback controls. The fourth row shows a file named 'Recorded for training purposes' with a download link and playback controls. The fifth row shows a file named 'All representatives busy' with a download link and playback controls. The sixth row shows a file named 'Leave a voice message' with a download link and playback controls.

AUDIO FILE NAME	DOWNLOAD	ACTIONS
Thanks for Calling. Please wait	Download Thanks for Calling. Please wait	▶ 0:00 / 0:04 — 🔊 ⋮ 🗑️
All agents busy, please wait	Download All agents busy, please wait	▶ 0:00 / 0:06 — 🔊 ⋮
Invalid option	Download Invalid option	▶ 0:00 / 0:04 — 🔊 ⋮
Recorded for training purposes	Download Recorded for training purposes	▶ 0:00 / 0:04 — 🔊 ⋮
All representatives busy	Download All representatives busy	▶ 0:00 / 0:05 — 🔊 ⋮
Leave a voice message	Download Leave a voice message	▶ 0:00 / 0:04 — 🔊 ⋮

7.17. Frequently Asked Questions

7.17.1. Call failure reasons and mitigation

How calls work at Exotel



A - Your customer calls on your customer-facing number which is on the website

B - Call diverted from your customer-facing to the ExoPhone number.

C - An IVR menu option for incoming callers. For example: "Dial 1 for support, Dial 2 for Sales, Dial 3 for feedback."

D - Passthru Applet that captures call details.

E - Exotel sends the call data to your CRM/application for processing.

F - CRM replies back with numbers of the agents to be called/dialed

G - Exotel connects to the agent number

H - Call is connected to an agent and is simultaneously recorded & call data is sent back to CRM.

Reasons for Call Failure

Reasons why call could fail in case 'A' & 'B'

Your callers listen to 'not reachable'/'switched off' when they call your customer-facing number:

- You might have missed paying your bills (for your customer-facing number).
- Divert from customer-facing to Exotel's ExoPhone number might have been re-set incorrectly or the operator might have canceled the diverts.

The caller may not be able to hear the IVR, and instead hears an engaged tone:

- This means all channels of the PRI are occupied, and no new inbound calls can be handled. So far we haven't faced such instances more than twice. Generally, we advise our high call volume customers to let us know in advance if they have planned any campaign to avoid these kinds of situations.

If in case this happens, we provide additional physical numbers to the account.

Reasons why call could fail in case 'C' & 'D'

- The right group would have been assigned to receive calls (i.e.: the group would have been deleted/or the name of the group would have been edited)
- If your call flow has a URL or a passthru applet in it, would not be functioning as expected.
- A passthru applet fails because there could be a loss of connection between our server and your CRM/application, if something is broken at our end then we try to fix it as fast as possible.

Reasons why call could fail in case 'E' & 'F'

- Your CRM/our server application would not be functioning as expected.

Reasons why call could fail in case 'G'

- At times you will be seeing missed calls on your Exotel dashboard, despite your agent's phone being free to receive calls, this is because the Agent's mobile is unreachable. We get a busy/unreachable signal when we dial out the agent's mobile from Exotel's PRI.

What happens if our lines are down?

The reliability of our service is the topmost priority at Exotel. And telephony infrastructure in India is unreliable, to say the least. Most probably, as you are reading this, someone somewhere while digging up some road has accidentally cut a telephone cable.

To achieve high reliability despite an unreliable telephony backbone, we have built technology that does some smart work. However, one of the things that we realized time and again was that no amount of cool technology is enough on its own. When things actually go down, proper communication with the customers is essential. When we say "proper" communication, it has to be:

Transparent: we don't hide anything from the customer. More the information, the better.

Timely: There is no point in sending an email 4 hours after a downtime, is there?

So far, whenever there was an unexpected downtime, we send out emails to our affected customers.

Any existing or potential customer, can take a look and get a sense of how reliable Exotel lines are -

status.exotel.in – one place where you, our customer (and anyone else) can view the health of different Exotel services. Live! And you can also view historical data on service health.

If you would not be able to wait until the lines are back?

Not all our lines would be down in a given circle, reach out to us for an alternate divert. If we have any PRI which is not affected by the downtime, we will definitely be able to accommodate you at your request.

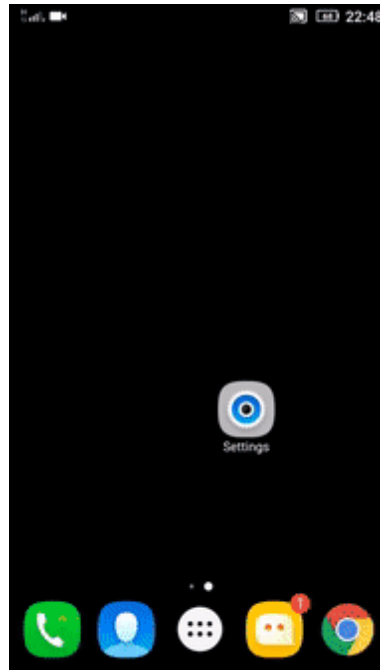
7.17.2. Improving call quality

Over the years, we've encountered instances where call quality may seem to have swayed, while all our systems and the Operator network have been functioning with the utmost efficiency.

Besides that, the issues seem to get resolved by itself after a certain duration and yet, without any intervention from our end.

In light of this, we conducted a study to find out what agents and customers might do to preserve call quality on their end and discovered that the following factors may affect call quality:

Voice calls prefer 2G over 3G or 4G



This can be achieved by switching the mobile data off on your handset, before a call

More than half of the members who participated in the survey confirmed this outcome after testing this for over a week's time.

Generally, you can say, for GSM -

-105 to -100 = Bad/drop call

-99 to -90 = Getting bad/signal may break up

-89 to -80 = OK/shouldn't have problems, but maybe

-79 to -65 = Good

Over -65 = Excellent

Failed calls also might occur in bad network areas.

You may find more relevant information [here](#).

Sending or receiving SMS in the middle of a call

Even though needing to receive an SMS is an uncontrollable circumstance, it should be taken into account if you have poor call quality or a disparity between calls.

Since mobile data and SMSs use part of the bandwidth/spectrum that gets allocated for a call, controlling their usage can indeed be of great help with improving the call quality and also the overall experience of a call.

7.17.3. I hear echo in my phone calls

Hearing an echo on call is common in **POTS** (Plain old telephone service). If you are using an analog landline telephone or calling a number that is an analog phone line, it is likely that you might hear echoing on call.

Hearing an echo on call is common when your phone set/device or the far end person's phone set/device, is used with hands-free or Bluetooth.

Intermittent echo issues are very common with most operators. We have all heard this even before Exotel came into existence.

Having said all of this, there is always a slight possibility that the problem is at our end as well. Please be assured that we will get it checked out. However, we would need the following information to debug:

1. From Number (Instrument used)
2. To Number (You probably don't know what instrument your customer is using. If you do know, tell us about that as well)
3. Date & Time of call OR **Call Reference ID** of the call from the call report, or Inbox

7.17.4. I am getting a call from a different number?

When you receive a call via Exotel, the caller ID you see on your phone is not of the person who is calling your company's number. Instead, the number you see is your Exotel number. This is because caller ID masking is illegal in India. The regulators do not allow us to pass along the calling number as the caller ID. The good news though, is that, because all your company calls come from a few numbers, you will be able to differentiate your company calls from your calls and other promotional calls that you may be getting. This is also true for outbound calls that you make.

Now, the caller ID will be your company number or one or two other numbers. These additional numbers (backups) are automatically assigned by our system for redundancy and business continuity purposes.

Please note the backup number plays an important role in the connectivity and also contributes to better call quality. In case there are any issues with the primary number, the calls are routed via the backup ensuring the call are not failed. However please note the details of the backup number shall not be available on the dashboard, Inbox, or the call reports as these are present passively and added from the backend.

Kindly be assured we shall be able to track the calls routed via the primary and the backup and help you out in case of any concerns. Please feel free to reach out to us via any of the below-mentioned channels. We'd be glad to assist you!

7.17.5. Outgoing Call is not working



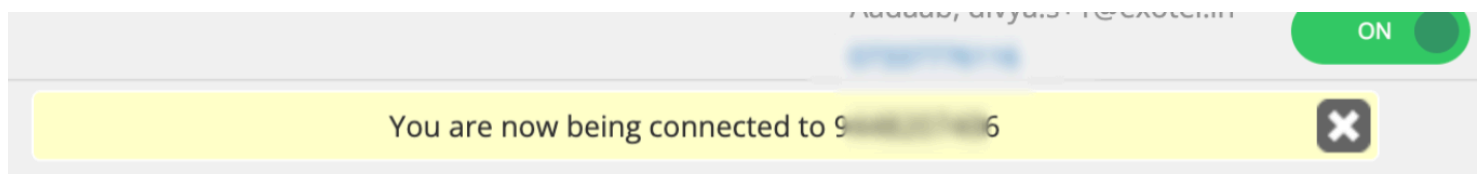
HTML & iframes are not visible in the CMS

For security reasons, iframe and HTML blocks are only rendered on your published documentation site, not in the Content Management System.

Outgoing Call is not working : I get a pop-up saying "You are now being connected to " but I don't get a call on my number. Why?

There are three main reasons for this occurrence. This is what happens when you place an outbound call from your Exotel dashboard.

As soon as you click on the 'Call' button, Exotel places a call from your Exotel number to your number(the registered number). Once you pick up the call(Leg1 of the call), Exotel then triggers a call to the dialed number(Leg2 of the call). If all is well, the call should now be connected to the callee.



You may not get a call on your number for the following reasons:

1. Your number is switched off (doh!).
2. Your number is not reachable.
3. There is an operator-level connection problem (Eg: Calls from Airtel to Vodafone are failing).
4. Check your network connection.
5. If the ExoPhone(virtual number) is marked as Spam/blocked on your device.

Troubleshooting Steps

Step 1: If your phone was on and if you had not got the call, **please try restarting your phone.**

Step 2: If a restart does not work then **put the phone in the Airplane mode. Leave it on for about 30 seconds and turn it back off.** This can do the trick. It will automatically reconnect to a closer mobile tower or a less busy mobile tower to provide stronger cellular connectivity. This will help you to figure out if there was a network issue at your end.

Step 3: Check your call history or the blocked number list to see if the ExoPhone is marked as Spam or is in the blocked contact list. Please mark the number as not Spam or remove the number from the blocked contact list for the calls to connect successfully.

Step 4: If the above steps do not help, then raise a support ticket by sending an email to hello@exotel.in with details like your username, the number you tried calling and the time of the call or If you have any questions or concerns, please connect with us using the chat widget on your Exotel Dashboard or Whatsapp us on 08088919888.

7.17.6. Why the dialled status shows no answer when it is disconnected?

Case 1: When the Agent 'does not answer the incoming call

When there is an incoming call and the agent does not answer the dialled status will show as **"no answer"**

DIRECTION	EXOPHONE/FLOW	From :	To :	Inrrougn :
Incoming	Test double passthru	0000000000 completed	0000000000 no-answer	0000000000
		Total Talk Time: 0s		Call Time: Mon, 27 Mar 2023 12:14:23
		Start Time: Mon, 27 Mar 2023 12:14:23		End Time: Mon, 27 Mar 2023 12:14:59
Transcription: Missed Call from 0000000000 at Mon, 27 Mar 2023 12:14:24. One or all of the agents failed to attend or were busy				
Here is what happened: Missed Call from 0000000000 at Mon, 27 Mar 2023 12:14:24. One or all of the agents failed to attend or were busy The number 0000000000 received a call from 0000000000 at Mon, 27 Mar 2023 12:14:24 An HTTP Call was made on the url: https://en15jcv2pix4.x.pipedream.net/ The call was routed to the following members of the group "Sales" 0000000000, who did not pick up the call An HTTP Call was made on the url: https://en15jcv2pix4.x.pipedream.net/				

```
"dialCallStatus": "no-answer",
"direction": "inbound",
```

Case 2: When the Agent 'disconnects' the incoming call

1. If the agent disconnects the incoming call within 31 seconds of ring duration it will show as **"busy/canceled"**
2. If the agent disconnects the incoming call after 31 seconds of ring duration it will show as **"no answer"**.

```
"dialCallStatus": "no-answer",
"direction": "inbound",
"duration": 41,
```

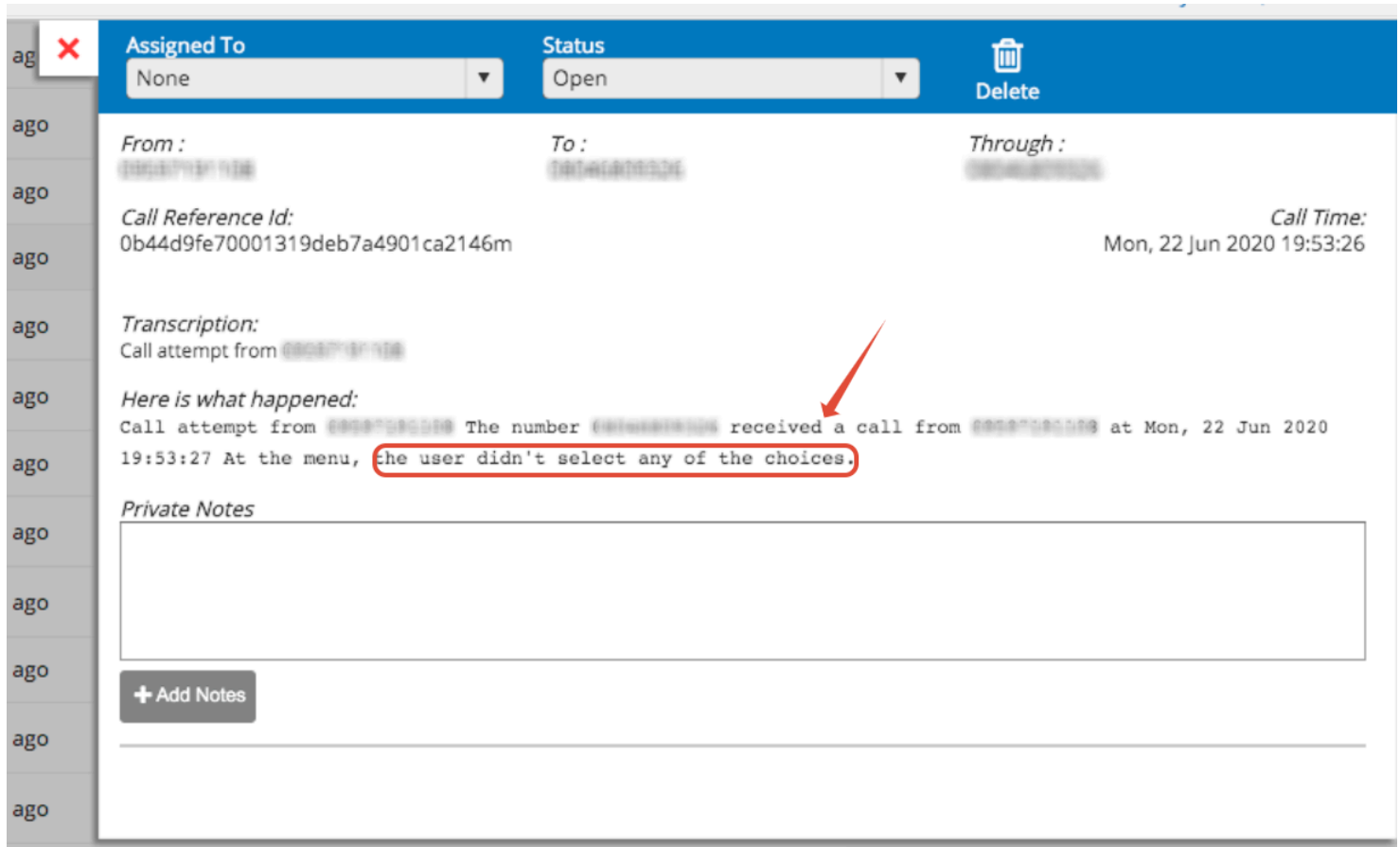
This is because the default time set by Exotel is 31 seconds

7.17.7 Why do I get so many missed calls?

None of us wants to miss our customer's call. If you see a lot of missed calls on your dashboard and would like to understand them and reduce them, read on. Unlike your cell phone, we at Exotel classify missed calls into two types:

Call Attempt

Simply put, these are customer hang-ups/canceled calls even before Exotel could try connecting the call to one of your available agents. There could be plenty of reasons why a customer chose to disconnect an ongoing call. One of them could a big boring IVR, lengthy waiting time, and so on. This is how one a Call-Attempt looks on the Call detail page:



The screenshot shows the Exotel interface for a call attempt. At the top, there are dropdowns for 'Assigned To' (set to 'None') and 'Status' (set to 'Open'), along with a 'Delete' button. Below this, the call details are displayed: 'From:', 'To:', and 'Through:' fields, followed by the 'Call Reference Id' (0b44d9fe70001319deb7a4901ca2146m) and 'Call Time' (Mon, 22 Jun 2020 19:53:26). The 'Transcription' section shows 'Call attempt from [redacted]'. The 'Here is what happened:' section contains the text: 'Call attempt from [redacted] The number [redacted] received a call from [redacted] at Mon, 22 Jun 2020 19:53:27 At the menu, the user didn't select any of the choices.' A red arrow points to the phrase 'the user didn't select any of the choices.' which is also circled in red. Below this is a 'Private Notes' section with a text area and a '+ Add Notes' button.

Missed Call

These are the normal missed calls on which Exotel tried to connect your customer's call to your agents and one of the following scenarios occurred:

- * All of them were busy or
- * No one picked up the call even though the call rang on their phones or
- * Customer decides he has waited for long enough & then hangs up.

Look at the "Here is what happened" portion in the call detail page to confirm what type of call it actually is:

✖

Assigned To

None

Status

Open

🗑️

Delete

From :

08247134729

To :

Res/Team 101(08432371467)

Through :

08432371467

Call Reference Id:

2021162061-148-10-31-20665171-1467

Call Time:

Mon, 22 Jun 2020 17:33:53

Transcription:

Missed Call from 08247134729 at Mon, 22 Jun 2020 17:33:53. Customer may have cut the call

Here is what happened:

Missed Call from 08247134729 at Mon, 22 Jun 2020 17:33:53. Customer may have cut the call The number 08432371467 received a call from 08247134729 at Mon, 22 Jun 2020 17:33:53 At the menu, the user didn't select any of the choices. The call was transferred to "Support_Hot_Flow". The call was transferred to "Support_Hot_Flow". The call was routed to the following members of the group "Support_Hot_Flow" Res/Team 101 (08432371467), when the caller hung up before the call could be picked The call was transferred to "Support_Hot_Flow".

Private Notes

+ Add Notes

You can also refer to the support article on other stats [Call Status](#)

Suggestions to reduce missed calls

- Reduce the length of your Greeting or IVR Menu. Be crisp & to the point. For example:

Thank you for calling Exotel. Please press 1 to talk to our customer support team, please press 2 to talk to our sales team or if you know the extension, please dial now.

This IVR message can be shortened as -

Thank you for calling Exotel. Press 1 for support, 2 for sales, or dial the extension.

- Get a professional voice recording done. They say the first impression is the best impression. An excited happy person's voice is better than a sad gloomy person's. An excited happy woman's voice is probably even better. You could get your text recorded using Exotel's voice-over recording service too.
- Turn off call waiting: Your agents may get calls from their friends & family. As Exotel does not know they are on a call, it will still try to call their number for the duration of "Number of seconds to ring the agent's phone before trying the next person". To avoid this, ask them to turn off the call waiting on their handset. Most features & smartphones will have this option. This will ensure that Exotel will quickly go to the next available agent.
- If you have more people in your company, add them to the group that is getting the calls. Exotel is about flexibility. So add as many people as you can to your system. It is pretty easy to turn them on/off anyway.
- Adjust the time to ring on the agent's phone until you get the optimal value.
- Take a voicemail or send an SMS back (as a part of the call flow) saying sorry. If you use a ticketing system, then use the ticketing system's email gateway ID as the email address in the group so that "unattended call emails" become tickets.
- Watch out for situations where all users in a group go "OFF".
- Ensure that all users are "verified" users. Exotel will not send calls to them otherwise.

Some caveats:

- Not all "Call attempts" are bad calls. For eg, if you are running a missed call campaign, naturally it will show up as a Call Attempt in your inbox.
- If you have a timing applet and are informing the customer that you are closed and then hang up, it will still show as a call attempt.

7.17.8. How to send SMS' to co-workers or agents after the call

How do i get an sms alerting me on the fact that a call was made to our exotel number? Is it possible to alert multiple numbers (via sms) upon receiving the call?

Kindly note as per the TRAI regulations, You need your complete your Entity registration on the DLT platforms.

You will achieve this using the "NEW SMS" Applet in the call flow builder.

In the "After the call conversation ends..." part of your connect applet, Drag & drop the "NEW SMS applet".



You could now choose to send an SMS to a single user, group, or even a list. There are some placeholders such as `%caller%` and `%pickedupby%` which you can use to get values like the caller's phone number etc. This is how it looks:

Use `%caller%` to substitute the caller's number (Customers number)

Use `%number%` for the number called (ie. Your ExoPhone number)

Use `%pickedupby%` for the person who picked up the phone (Agents number)

Note: `%pickedupby%` will show your agent name and number if agent contact is saved in the address book or in coworkers (Address book is taken as the primary identifier if details are different in coworkers or in the address book)

And also the template which you add must be registered and approved by the DLT portal. You can refer to this article [here](#)

New SMS

✕

SMS Sender ID

SAMPLE
▼

Recipient

Choose the user or group to send SMS to...

☒

Sales
🔍

Choose a list to send SMS to...

☐

▼

NOTE: SMSes will be sent to a maximum of 10 numbers. All other numbers in the list will be ignored.

Message

Use %caller% to substitute the caller's number, %number% for the number called and %pickedupby% for the person who picked up the phone

Type your message or [Choose a SMS Template](#)

You got call from %caller%|

26/1000, 1 SMS

When you choose RECIPIENT as Group, then by default the SMS will be delivered as transactional using your transactional sender ID.

If you choose the RECIPIENT as a list, then the SMS will be sent as promotional. Please ensure you have an approved promotional Sender ID registered in the Exotel account.

Troubleshooting tips:

- If SMS is not getting delivered to your agents then check if you are choosing a group or list and then update your sender ID accordingly or add your agents as a coworker and use transactional sender ID.

- If you want to send transactional SMS by choosing LIST then ensure your SMS template is approved in the right category.

7.17.9. Why are calls not routed to all the agents?



HTML & iframes are not visible in the CMS

For security reasons, iframe and HTML blocks are only rendered on your published documentation site, not in the Content Management System.

You have four agents in the group and all of them are free. Yet, the third and fourth agents in the group don't receive the call if the first & second agents don't pick up!

The following applets or actions force Exotel to pick up a call:

- Greeting
- Gather
- Voicemail
- IVR Menu
- Connect (until the dial whom person picks up)

IVR Menu

Menu Prompt

When the caller reaches this menu they will hear:

Read Text like a robot...Learn more about [how this will sound](#)

Welcome to Exotel!

Get this text Recorded

Save

You can also put a URL above that returns plain text which will be read out

Menu Options

Keypress	Applet	Add & Remove
1	then Connect	+
	then Connect	+ -

Connect

How do you want to control your Connect params?

Configure using flow builder here

Configure parameters dynamically by providing a URL

Primary URL: *

Enter URL here

Fallback URL (optional): ?

Enter fallback URL here

[Click here](#) for the list of parameters and how they can be controlled

Dial Whom

Dial a user or group

Divya_Shivakumar

Q

Dial phone number(s):

DND Check

Like 08088919888

or a comma separated list like 08088919888,08049114900

Note: Calls to DND number will be blocked if it is not whitelisted

[How to Whitelist DND numbers](#)

Distribute Calls

☐	Sequentially <i>in the order they appear in the group</i>
☒	Equally <i>across all members of the group</i>

Record this call?	☒
Recording Channels? Beta ?	☒ Single ☐ Dual
Sticky agent? ?	☐
Limit ringing duration to:	30 seconds (Default: 30s)
Limit conversation duration to:	mins (Blank for 4 hours)

Music on hold ?

On the contrary, Exotel can perform the following actions without picking a call up:

- New call
- (Sending an) SMS
- Email
- Hangup
- Timing
- Passthru
- List Manager

When you call a number, the default ring time may be different depending on the destination parties' operator setting. We hear that it is typically a minute but has always been about and above 40 seconds. This is the amount of time you hear a 'tring tring' before you hear something like "The Airtel number you are trying to reach....".

If the following is your configuration in your connect applet:

- 4 agents in a group
- 30 seconds ring time

And, let's say the first applet in your call flow/app is a "Connect" applet, which means, Exotel will not pick the call up until one of your agents does. Then, by the time it finishes ringing the second agent, the operator time out kicks in, and the caller hears an audio prompt similar to "the number you are trying to reach...".

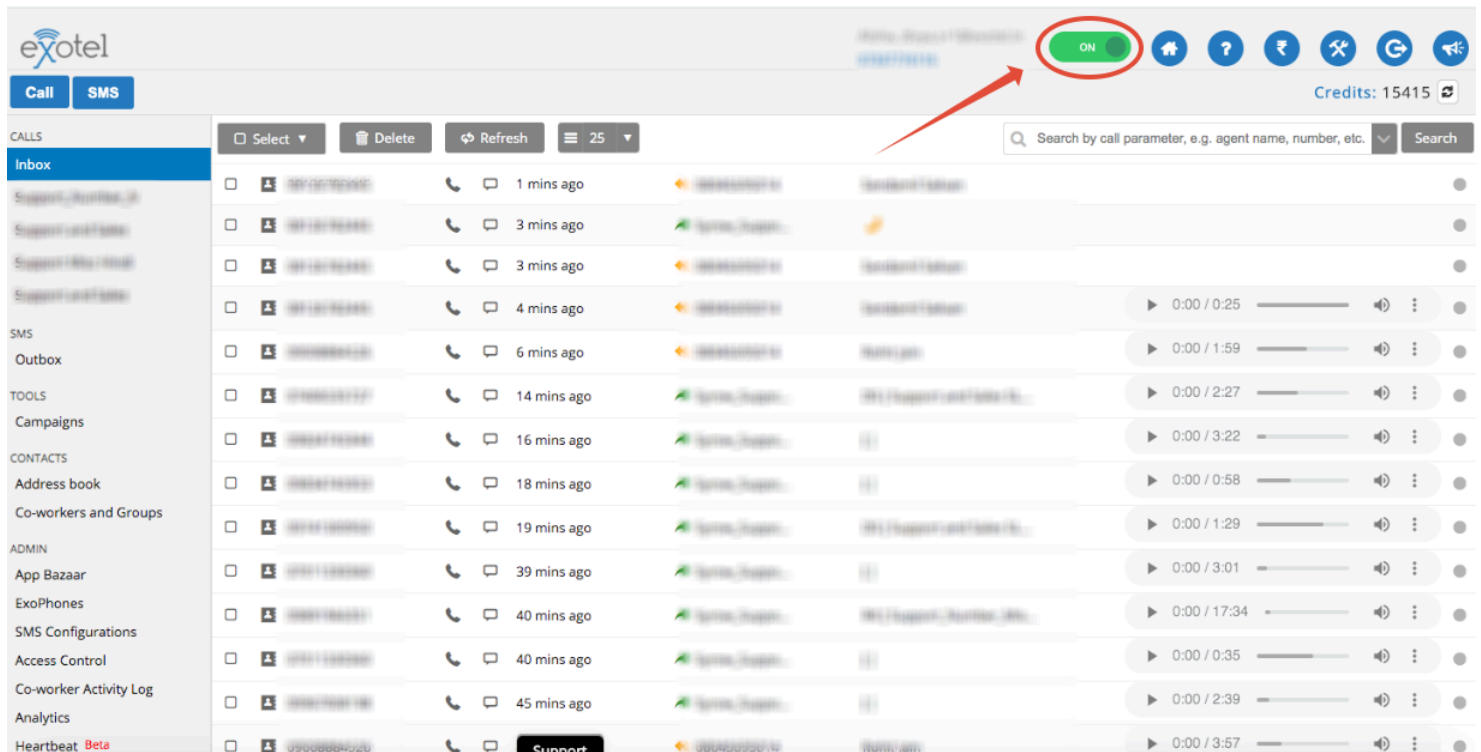
Two ways of mitigating the problem:

- Try to add one of the applets that pick up a call. Say, a greeting - "Thank you for calling us, please wait!". Because the call is picked up, you could now ring all the agents and the network will not interfere to cut the call!
- Reducing the time to ring option to something like 20 secs. (please note that we usually do not recommend reducing the ringing duration to less than 20 secs which might cause any issues) This way you can accommodate about 4 agents.

7.17.10. I'm logged into the Exotel account but I'm not receiving calls. Why is that?

1. Is your number switched "ON" in the Exotel dashboard?

Even if you're logged in to <http://my.exotel.in>, you need to be switched on to receive calls. You can check this on the top right corner of your account.



2. Are you a part of the group that is configured to receive calls?

For example, if the group Exotel_Support is set to receive calls as a part of your incoming call flow, check if you're a part of the group. Go to the Co-workers & Groups page and check the group by clicking on it. If not, add yourself to the group by dragging and dropping your name to the group. (**Note:** Only the Admins have access to add the co-worker into the group)

The screenshot displays the exotel Business Phone System interface. The top header shows the exotel logo, a status bar with 'ON' and various icons, and a 'Credits: 15415' indicator. The left sidebar contains navigation menus for CALLS, SMS, TOOLS, CONTACTS, and ADMIN. The main content area is titled 'Co-workers and Groups' and includes buttons for 'Invite co-workers' and 'Add Group'.

My co-workers

Live Stats (Total Users: 10) 0 QUEUED 0 ON CALL 2 IDLE 6 OFFLINE

Use your mouse to drag a co-worker into a group to add him/her to the group.
Also, now you can click on icon in user-box to add/remove user's groups

The 'My co-workers' section displays a grid of user boxes, each with a crown icon, a name, a status indicator (e.g., 'ON CALL', 'IDLE', 'OFFLINE'), and a person icon. A red arrow points from one of these user boxes to the 'Groups' section.

Groups

Select a group to view the user list.

Support_Number_Misc
(Total Users: 5)
0 QUEUED 0 ON CALL 2 IDLE 3 OFFLINE
Shortcode - 642

The 'Groups' section shows a list of groups with their respective user counts and status indicators. The 'Support_Number_Misc' group is highlighted, showing 5 total users with 0 queued, 0 on call, 2 idle, and 3 offline.

3. Momentary issues

There could be momentary issues at the operator's end. Give it a few minutes and try again.

7.17.11. Exotel Uptime & Downtime information

How can find out about Exotel's downtimes? Is there a place where I can monitor this for myself?

We, at Exotel, take our reliability very seriously. This means we strive very hard to achieve unparalleled uptimes. To hold ourselves accountable, we make our uptime information available for everyone to see. It is available at <http://status.exotel.in>

You can scroll all the way down and observe all incidents that were reported each week along with the resolution time.

Past Incidents

19th November 2021



Pune Issue observed for 'Incoming Calls' in Pune Region

2 days ago

Identified at [19/11/21 12:05 AM] with 'Major Outage'

Issue has been resolved at [19/11/21 12:10 AM]

18th November 2021

No incidents reported

17th November 2021



Gujarat Issue observed for 'Outgoing Calls' in Gujarat Region

3 days ago

Identified at [17/11/21 11:55 AM] with 'Partial Outage'

Issue has been resolved at [17/11/21 12:00 PM]



Gujarat Issue observed for 'Outgoing Calls' in Gujarat Region

3 days ago

Identified at [17/11/21 11:05 AM] with 'Partial Outage'

Issue has been resolved at [17/11/21 11:10 AM]

← Previous Week

Next Week →

You'd also be able to keep yourself updated in real-time with the system status on Exotel Status Board.

Please note that on top of this, we'd be sending out "Downtime emails" in case of an outage, and "Uptime emails" as soon as it's resolved, to all affected clients.

7.17.12. Not getting pop-ups for incoming calls

If you're not getting pop-ups for incoming calls, we suggest you try the following steps first:

1. Try opening <http://my.exotel.in> else if you have an account with Mumbai stamp the link: <http://my.in.exotel.in> in another browser, and see if you get pop-ups for incoming calls
2. Check if the pop-up is allowed on the browser settings.
3. Clear your browser cache & cookies, and log into your Exotel account again.
4. If you're using a restrained network, please ask your network/system administrator to check if there are any blockages on additional traffic.

7.17.13. Calls not reaching my phone

Your call transcript indicates that the call reached your phone and was not picked up. However, in reality, the call never reached your phone.

Explanation

Exotel determines call outcomes based on **ISDN cause codes** received from telecom operators. These codes tell us what happened during the call journey – for example, whether it was connected, not answered, busy, or failed.

In some cases, operators return incorrect or inconsistent cause codes. When this happens, our system may report that a call reached your device (and was not answered), even though it never actually rang.

We've implemented internal heuristics to improve accuracy, but since these codes originate from telecom operators, the root cause often depends on how each operator reports call events. This varies by operator and region (or *circle*).

Our engineering teams are actively working with operators to standardize these configurations and make the reports more reliable.

Why It Happens

- **Operator-level reporting issues:**
Some telecom operators send incorrect cause codes, leading to mismatched call statuses.
- **User vs. operator behavior:**
The system can only display what the operator reports. For instance, if the operator classifies the call as “not answered,” Exotel will reflect that, even if the call never actually reached your device.
- **Telecom infrastructure limitation:**
The current telecom architecture does not allow Exotel to directly verify if a call physically rang on your phone.

What You Can Try

If you frequently face calls not landing on your phone, please try the following basic troubleshooting steps:

1. Turn on **Airplane Mode**.
2. Power off your device.
3. Remove and reinsert your **SIM card**.
4. Turn on your device again.
5. Turn off **Airplane Mode**.

If the issue persists, share the **Call SID** and **timestamp** of the affected call with our support team – this helps us trace the exact operator response and escalate as needed.

7.17.14. Calls not landing on Exophone

Sometimes, you may get to hear one of many error messages while calling in on an ExoPhone. Some of the common ones are -

- The number you've dialed is incorrect or invalid. Please check the number you've dialed
- The number you've dialed does not exist. Please check the number you've dialed
- All routes to this number are busy. Please call back after some time
- All channels are busy. Please call back after some time
- In some cases, the call may even fail to originate from your device i.e. when you click the dial button, the call may simply disconnect at the very first instance, etc.

These can happen due to multiple reasons, such as -

- An ongoing point of interface (POI) issue between the end operator (caller) and the ExoPhone's operator
- Congestion at either the caller's or ExoPhone's operator (i.e. not enough channels/bandwidth available at the Telephony operator end to accommodate calls at that point in time)
- The issue with Home Location Register (HLR) lookup in the caller's party operator. The HLR system might be congested or throwing up errors while trying to find ExoPhone's operator/region to route the call to the right switch
- Switch level issues in diverting the call to ExoPhone
- The number may have indeed been incorrectly dialed (ex: since most ExoPhones are landline numbers, they're either to be prefixed with a 0 or a +91, before being dialed upon)
etc.

Typically, these are **temporary in nature and occur intermittently** that go unnoticed most times; however, if these seem to be persistent, please document at least five such instances and report them to our Customer Happiness team by writing to us at hello@exotel.in with the following details -

1. **Video Documentation** (audio included) of the entire issue where the ExoPhone is being dialed upon and the error message is clearly audible, within the video
2. Share the caller's (From) number along with the operator's name, city, and state
3. Try to test this by calling in on the same ExoPhone but with a different number and a different operator. Share your observations once you've tested this, so we may try and identify/isolate the root cause of the problem i.e. if it is operator-specific, a particular region-specific, or otherwise

This information should help us escalate the reported issues to the Operator, with whom our team would work alongside, in having the issues fixed on priority. While working on these issues, our team might have to place live testing on the reported numbers and we request you to co-operate with the same.

Given that the calls may not even land on Exotel's servers, we understand that you would accordingly not be able to provide us with any viable call reference IDs and as such, the video documentation along with other necessary details would help.

8. AppBazaar

8.1. Manage Call Flows

Create a Call Flow

1. In the **Admin** section, you can create a new flow by clicking the option **App Bazaar** --> **Installed Apps** tab
2. Click on **Create App** and enter a flow name

The screenshot shows the 'App Bazaar' interface with the 'Installed Apps' tab selected. A sidebar on the left contains navigation links under 'ADMIN', with 'App Bazaar' highlighted. A red arrow labeled '1' points to this link. The main content area has two tabs: 'Installed Apps' (active) and 'Available Apps'. Below the tabs are four buttons: 'Install' (with subtext 'Install an app for Free'), 'Test out' (with subtext 'Test the app with your trial number'), 'Buy App' (with subtext 'Happy with the app? Buy it'), and 'Connect' (with subtext 'Connect it to your company number'). Below these is a 'Custom Apps' section with a '+ Create' button, indicated by a red arrow labeled '2'. Below this is a table of installed apps.

NAME	EXOPHONES	CALL SETUP	SMS SETUP	APP ID	DELETE APP	DUPLICATE APP
Flow 1	None	Edit Call App	Create SMS App	12345678		Duplicate
Flow 2	None	Edit Call App	Create SMS App	87654321		Duplicate
Flow 3	Call Forwarding, Transfer, Hold, Park, Conference, Hold, Park, Transfer, Hold, Park, Conference	Edit Call App	Create SMS App	98765432		Duplicate

At the bottom of the table, there is a pagination bar showing '< 1 - 3 / 3 >'.

Edit & Save a Call Flow

1. To edit a flow, click on **App Bazaar** --> **Installed Apps** --> **Edit Call App** link next to the call flow that you would like to modify
2. You can drag and drop the required applets to create your flow. You can understand what each applet does by hovering your mouse over the applet. You can also find detailed information on each Applet and its functionality here
3. Once you have created a flow, you can 'Save' and 'Close' it

Exotel

Save
Close

Call Start

When a call begins, what should we do?

Drag an applet from the right to get started.


 Greeting

Greeting

Audio Choice

When the caller reaches this prompt, they will hear:

Read Text like a robot...Learn more about [how this will sound](#)

Welcome to Exotel

You can also put a URL above that returns plain text which will be read out

Get this text Recorded
Save

Next

After the initial prompt, continue to the next applet

Drop applet here

Voice Applets

 Greeting	 Connect
 New Call	 Voicemail
 Email	 IVR Menu
 Hangup	 Timing
 Gather	 Passthru
 Transfer	 Who's Calling?

8.2. Applets

Overview

Exotel's **Call Flow Applets** allow you to design intelligent call workflows that manage customer interactions dynamically. An Applet is a building block for creating call flows and you can mix and match Applets in your call flows to greet callers, route calls, capture input, or send automated notifications.

Below is an overview of each available applet and its purpose.

Greeting Applet

The **Greeting** applet allows you to pre-set a recorded voice or entry message for your callers.

You can:

- Upload a custom `.wav` file (8000 Hz Mono)
- Record a message using your phone
- Let *Robocop* (text-to-speech) speak for you
- Dynamically change the greeting at call time by specifying an **Application URL** that returns a `.wav` file

--> Learn more about the [Greeting Applet](#)

Connect Applet

The **Connect** applet is used to connect callers to users, groups, or phone numbers.

You can activate the following features within this applet:

- **Dial a User or Group**
Always recommended to connect via a group for better load distribution.
- **Record Calls**
Optionally play a message via the Greeting applet to inform callers that calls are recorded for quality purposes.
- **Load Balancing**
Evenly distributes incoming calls among all group members over time.
- **Sticky Agent**
Ensures returning callers are connected to the same agent they last spoke with, improving customer continuity.
- **Queue Calls**
When all agents are busy, callers are placed in a queue.
You can play a message or hold music during this wait.

Note: Queue messages play only when all agents are *busy on Exotel calls*.

If agents are switched off, unavailable, or on external (non-Exotel) calls, the queue message will not play; instead, the call moves to the "If Nobody Answers" section of the flow.

--> Learn more about the [Connect Applet](#) , [Call Queuing](#)

Voicemail Applet

The **Voicemail** applet allows callers to leave voice messages when agents are unavailable. These recordings are stored and can be routed to a specific user or group for review.

Email Applet

The **Email** applet sends an email to a user or group email ID with complete call details, including:

- Who called
- Call time
- Agent response
- Caller input (if any)
- Voicemail recording (if applicable)

IVR Menu Applet

The **IVR Menu** applet lets you create multi-option menus such as:

"Press 1 for Sales, 2 for Support, 9 for Others."

You can configure it for:

- Department-based routing
- Region-based routing
- Language-based routing

It effectively acts as a **Virtual Receptionist** for your business.

Hangup Applet

The **Hangup** applet simply ends the call flow.

It's typically placed at the end of your flow to close the call cleanly.

Timing Applet

The **Timing** applet helps define operating hours for call handling.

You can:

- Accept calls during specific time windows
- Redirect after-hours calls to **Voicemail** or another flow

Multiple shifts can be created by reusing the Timing applet with **Transfer** applets.

Gather Applet

The **Gather** applet captures numeric input from callers using their keypad.

Common use cases include:

- Capturing coupon codes
- Verifying IDs
- Collecting menu selections
- Passing user input dynamically via the **PassThru** applet

PassThru Applet

The **PassThru** applet allows data exchange between Exotel and your systems.

It sends call details (via HTTP GET/POST) to your hosted endpoint and receives a response in real time.

This enables tight CRM integration, live data exchange, and dynamic flow decisions.

To explore all PassThru API parameters, see the **API Documentation** tab in your Exotel Dashboard.

Transfer Applet

The **Transfer** applet helps manage modular call flows.

You can:

- Transfer callers between multiple flows
- Reuse existing flows (e.g., a “Voicemail” flow) instead of recreating them
- Keep flows shorter, flexible, and easier to update

Who's Calling Applet

The **Who's Calling** applet routes callers based on their phone numbers.

You can:

- Define caller lists (e.g., customers, employees, VIPs)
- Route each group to different applets or flows
- Provide specialized handling for known contacts

List Manager Applet

The **List Manager** applet allows dynamic addition of callers to lists.

Example use case:

- Subscribing callers to an “Offers” or “Alerts” list
- Managing contact lists for campaigns

Lists can be viewed or edited under the **Lists** tab in the Exotel Dashboard.

Switch Case Applet

The **Switch Case** applet allows you to route calls based on multiple possible responses. You can define conditions that determine which branch or flow the caller will be sent to next.

For detailed use cases, refer to the dedicated [Switch Case Applet documentation](#).

SMS Applet

The **SMS** applet sends a message to the caller after an incoming call.

Two modes are available:

- **Static Message:**
A predefined message is sent (e.g., "Thank you for calling! We have received your request.")
- **Dynamic Message:**
Exotel fetches a message from your provided URL (GET request).
The text returned in plain format is sent as the SMS content.

Note: All messages must be transactional in nature. Ensure the message is approved as a **Transactional Template**.
[Learn how to apply for a transactional template](#).

New SMS Applet

The **New SMS** (or **New Text**) applet sends SMS notifications to internal agents or groups involved in a call flow.

Typical use: Notify an agent when a new call or voicemail is received.

You can include the following variables in your message body:

Variable	Description
<code>%caller%</code>	Caller's phone number
<code>%number%</code>	Your Exotel number that received the call
<code>%pickedupby%</code>	The agent's number who answered the call

Learn More

Explore more use cases and feature updates on the [Exotel Blog](#).

8.2.1. Connect Applet

Every single customer of Exotel uses Exotel because they want complete control over how they route incoming calls and to whom. Exotel provides a variety of different options and ways to route your incoming calls. This article lists all possibilities, but before that, let's get some concepts out of the way:

The team: We have a hypothetical group called the "Support" group in which there are three members: Ajay, Bhaskar & Chaitanya in that order.

Parallel Ringing(On Request Feature)

With Exotel, it is possible to send an incoming call to Ajay, Bhaskar & Chaitanya at the same time. That is, Exotel can ring all their phones at the same time and connect the caller to the first person who picks the call up. Read more about parallel ringing

Connect Configuration options

Dial Whom

Choose the group to send this call to. Click on the "magnifying glass" to select a group. Alternatively, You can use the radio button to choose the "text box" section. In the text box, paste in a valid URL that can return text and valid HTTP headers. Refer here for the documentation of providing numbers to dial using your application URL.

The text box section is good & bad at the same time:

Pros: You have the freedom to return a comma-separated list of numbers to dial. This is useful if you want to make a dynamic decision (based on the caller's number or "an input you collected using the Gather applet which the caller may have pressed" in the previous step etc) on whom to call.

Cons: Exotel does not maintain the state of these numbers. That is - If another call comes and your script decides to send the call to the same set of numbers, Exotel will dial them and if the destination party has call waiting enabled, the caller will hear "The person you are trying to reach is on another call" etc. So - The user & user's state management is left to you to handle.

This text box option for pasting URL will only appear in Connect applet if you have submitted your KYC documents successfully.

Call recording

If you select this option, an entry in the inbox will also have a recording that you can play & listen to at a later point. If this is not checked, then there will still be a line item in your inbox without the recording. Read more about call recordings here.

Call routing - default option

The default call routing option in a group is the order in which the names appear once you click on the group name on the Co-workers & Groups page. That is, Every incoming call will be sent to Ajay first and if he does not pick up, to Bhaskar and then to Chaitanya. The default option respects whether the user is available & free. That is, If Ajay has turned himself "off" from the exotel system, then the call goes straight to Bhaskar. If Bhaskar is already talking to someone, then to Chaitanya.

Distribute calls equally to Group members:

This option is similar to "Round robin". In the round robin, If the first call today goes to Ajay, then the 2nd call goes to Bhaskar, the third to Chaitanya, etc. The point of the round-robin is to equally distribute the load of calls to all members in a group. In the example above, if Bhaskar cannot pick up when the second call comes in, the call is routed to Chaitanya. The third call then goes to Ajay and the fourth to Bhaskar. It is assumed that an agent who is "ON" would be free to pick up all calls. If you don't check this option, then it will be the above "default" option. Click here to know more about this feature.

Distribute Calls

☐	Sequentially <i>in the order they appear in the group</i>
☒	Equally <i>across all members of the group</i>

Record this call?	☐
Sticky agent? 	☐
Limit ringing duration to:	seconds (Default: 30s)
Limit conversation duration to:	mins (Blank for 4 hours)

Music on hold [?]

☒	Default Tone	 0:00 / 0:00  
☐	Custom Tone	

Sticky Agent

When an incoming call from a new user (Say Dinesh) is picked up by Bhaskar, then every time Dinesh calls, The call will always first go to Bhaskar. If Bhaskar is busy talking to someone else or is currently switched off from Exotel, then the call follows the usual routing configurations. This option is useful in assigning "account managers". That is, a single person responsible for a customer.

Sticky Agent will also work in an outbound scenario. Consider the above example where Bhaskar has used the Voice API (v1/v2/v3) to reach out to Dinesh. In this scenario, Exotel would have first dialed out to Bhaskar, who picks up, and then Exotel dials out to Dinesh. Irrespective of whether Dinesh picks up or not, Exotel will now ensure a mapping exists between Dinesh and Bhaskar for a fixed duration of 30 days. Dinesh will be able to connect back on the number and reach out to Bhaskar itself (the sticky agent) if a call flow attached to the same VN (that was used in the Voice APIs) has a connect applet with Bhaskar as one of the agents in the Agent Group.

Number of seconds to ring an agent

This is the amount of time to ring Ajay's phone number before moving on to Bhaskar. This time period starts from the time the server starts to dial (and not the time Ajay receives the call). There will be a 2 to 3-sec delay before the call lands on Ajay's phone (We all experience this delay. When you dial your friend's number, you will hear "beep, beep, beep" before it goes tring tring). The default is 30 secs. We recommend that you do not reduce this to less than 10 secs as Exotel might move on to Bhaskar even before Ajay realizes that he is getting a call on his number. The "beep beep" network slowness depends on the system load of not only Exotel (which we are constantly monitoring) but also the load and congestion in the source & destination operator networks.

Limit call duration

This is the length of the time period up to which the call can be active. The default is 4 hours and I can tell you that no one has ever crossed that limit yet. We recommend that you leave this blank. This option is particularly useful when you want to control the length of a call. For ex: If you have paid support and let's say the user has paid for a 30-minute slot, then you could use this to cut the call at the end of 30 minutes. Currently, Exotel does not inform the caller or the callee that their time period is over. It simply hangs up!

Music On Hold (Ringing Tone)

This is the music that will be playing when we dial the agent's number (Note: This is not the hold music that plays when you put the call on hold on your handset)

There are more options in connect:

Create popup...

When dialling multiple agents in a call, Exotel will pass on the details of the currently active agent to this url. You can create a popup in your CRM using these details. Please host this URL on your server.

After the call conversation ends...

Drop applet here

If all agents are busy...

Queue the caller?

☐

Play this message to the folks placed on queue:

Type Text
to read like a robot
or to get it
recorded

Upload
WAV or MP3 audio
file

Record
using a phone

Choose
from your library



Create Pop-Up (It triggers a call pop-up notification on your endpoint)

This is particularly useful to dynamically send information to one of your servers or systems. During the call option sends the parameters from number(customer number), to number(agent number), and caller ID(Exotel number); more about these parameters can be found here During the call.

After the call conversation ends.

There are a few things you can do when Ajay and Dinesh finish talking:

- Send an SMS to Dinesh saying "Thank you for calling Mannar & Company. We hope to hear from you again!". Drag/Drop the SMS applet to achieve this.
- Send an Email to the "Support" Group with the details of the call. Read more about the email applet.
- Pass the information through to your system/server using [Passthru Applet](#) .

If you leave this option empty, then the call will simply hang up (which is what you really want in most cases). Just to be clear, drag/drop the [Hangup Applet](#) applet.

Queue the caller

If all the agents are busy, You can put the caller in a queue and make him wait. Exotel will wake up every 10 seconds to check all callers in your queue and if there is a free agent who can talk to them. Read more about [Call Queuing](#) here.

If Nobody answers

Exotel will look into your configuration in this option if no one picked up the call in your group. To be specific, this option will be looked up if any of the following options are true:

1. There were agents in the group, some of them were free, Exotel sent the call to them but they did not pick up.
2. There were no free agents in the group at the time of the call
3. There were no agents at all in the group!
4. You had enabled the queue & after having placed the caller in the queue, the queue time out exceeded.

Choice 1: Say sorry & Hangup up plays this message to the caller & hangs up.

Choice 2: You could drag/drop another applet. For ex, a Voicemail or even an SMS applet that sends an SMS informing the customer that all three people were busy.

Frequently Asked Questions

- [Origin Based Routing \(or\) Geo Based Routing](#)
- [Zero App](#)
- Changing the order of agents in a group.
- Tips on reducing incoming missed calls

8.2.11. Distribute Calls Equally

You might have noticed this feature in the Connect applet. The ideal goal of this feature is to route an equal number of calls to all the agents in a group.

Distribute Calls

☐	Sequentially <i>in the order they appear in the group</i>
☒	Equally <i>across all members of the group</i>

In other words, enabling this option routes the calls in a “**round-robin**” manner among all the agents in a group. Obviously, it also considers the availability of the agents at the moment the call arrives.

Let us say, there are four people in a group Ajay, Bhaskar, Chaitanya, and Dev with their numbers being 011xx, 022xx, 033xx, and 044xx respectively.

When the first call lands on the VN which is supposed to be equally distributed between the agents in this group, the system will first stack the agent numbers which are free (in this case all four) in ascending order of agent numbers and route the call to the agent with the first number in the stack, in this example it is Ajay. It will also mark Ajay’s position in the stack as the **lastMarkedAgent** ie, the last called agent for future reference.

If the same group is present in different flows then there will be different **lastMarkedAgent** for each flow.

Status of Agents prior to the 1st call

Ajay - 011xx - free

Bhaskar - 022xx - free

Chaitanya - 033xx - free

Dev - 044xx - free

Stack for the 1st call

Ajay - 011xx - the first call routed to Ajay and Ajay is the **lastMarkedAgent** now

Bhaskar - 022xx - free

Chaitanya - 033xx - free

Dev - 044xx - free

Now when the second call comes in, the stack will rearrange itself with all numbers above the last marked agent moving to the end of the stack. Please note in case the **lastMarkedAgent** number itself is busy, all free agent numbers which come above it when ascendingly arranged in the original stack will move to the end of the stack. In the example here, Ajay will be pushed below Dev and Bhaskar is the agent to whom the call will be routed, and Bhaskar is marked as the last marked agent. Please note, that it is now up to Bhaskar whether he answers the call or not which is handled as a standard flow of the connect applet which moves on to the next free agent if Bhaskar does not pick up the call in a while.

Status of Agents prior to the 2nd call

Ajay - 011xx - free - lastMarkedAgent

Bhaskar - 022xx - free

Chaitanya - 033xx - free

Dev - 044xx - free

Stack for the 2nd call

Bhaskar - 022xx - the second call routed to Bhaskar and Bhaskar is the lastMarkedAgent now

Chaitanya - 033xx

Dev - 044xx

Ajay - 011xx

Now let's say after N calls came into the system, the status looks like the below:

Status of Agents prior to (N+1)th call

Ajay - 011xx - busy

Bhaskar - 022xx - free

Chaitanya - 033xx - free

Dev - 044xx - free - lastMarkedAgent

When the (N+1)th call lands, Ajay should be marked as the lastMarkedAgent. But here since Ajay is busy, the stack will not consider him. As per the stack, the call will now route to Bhaskar. It's important to remember that the stack only consists of agent numbers that are at that point in time free to receive calls.

Stack for (N+1)th call

Bhaskar - 022xx - (N+1)th call is routed to Bhaskar and Bhaskar marked as lastMarkedAgent

Chaitanya - 033xx

Dev - 044xx

When the (N+2)th call lands, first both Ajay and Bhaskar will be pushed to the end of the stack (since the lastMarkedAgent is Bhaskar), then Chaitanya is marked as the lastMarkedAgent and the call is routed to him.

Status of Agents prior to (N+2)th call

Ajay - 011xx - free

Bhaskar - 022xx - free - lastMarkedAgent

Chaitanya - 033xx - free

Dev - 044xx - free

Stack for (N+2)th call

Chaitanya - 033xx - lastMarkedAgent - (N+2)th call routed to Chaitanya

Dev - 044xx

Ajay - 011xx

Bhaskar - 022xx

This way the equal distribution logic ensures that the calls are routed in a perfect 'round robin' manner, and the sorted list keeps moving in a round path. There are a couple of scenarios that need to be highlighted here

Scenario 1: The agent is in an "OFF" state and switches to "ON"

Exotel provides the option to individual agents to mark themselves as not available to receive calls by marking themselves as "OFF". Agents who have marked themselves as "OFF" will not be considered in the stack itself. So there can be a scenario where an agent was initially in an "OFF" state and now marks themselves as ON, then the entry point for the person in the next calculated stack will be the place where they would fit if all the agent numbers were arranged in ascending order. Let us have a look at how this works.

Let us consider the scenario as shown below. Here Chaitanya is OFF. Naturally, the running stack would not have included him. So the current stack at the end of the Nth call looks like below, while Chaitanya is in OFF state.

Dev - 044xx - free - lastMarkedAgent | Chaitanya - 033xx - is in "OFF" state currently

Ajay - 011xx - free

Bhaskar - 022xx - free

Let's say now Chaitanya marks themselves as "ON". He enters the stack on top of the number which is immediately succeeding them in ascending order. So the stack will now look like this.

Chaitanya - 033xx - free

Dev - 044xx - free - lastMarkedAgent

Ajay - 011xx - free

Bhaskar - 022xx - free

So when the (N+1)th call comes in all the numbers from the top till the lastMarkedAgent are moved to the end of the stack en block. The stack will now look like this:

Ajay - 011xx - free - (N+1) the call was routed to Ajay and marked as lastMarkedAgent

Bhaskar - 022xx - free

Chaitanya - 033xx - free

Dev - 044xx - free

Here, both Chaitanya and Dev move to the end of the stack. Ajay is marked as the lastMarkedAgent and the call is routed to him.

Scenario 2: "Sticky Agent" option is enabled

Exotel allows generating call flows which when enabled, every time the end-user calls in the VN will connect them to the agent he has earlier spoken to. In this case, let us go back to the stack that we had at the end of the Nth call.

Dev - 044xx - free - lastMarkedAgent

Ajay - 011xx - free

Bhaskar - 022xx - free

Chaitanya - 033xx - free

Now, the (N+1)th call comes in from a customer whose sticky agent is Chaitanya. In this case, Chaitanya will be promoted to the top when the stack is calculated and the call will be routed to him. However, Dev will still continue to be the lastMarkedAgent.

Chaitanya - 033xx - free - (N+1)th call routed to Chaitanya

Dev - 044xx - free - lastMarkedAgent

Ajay - 011xx - free

Bhaskar - 022xx - free

Just like in scenario 1, when the (N+2)th call would come in, then both Chaitanya and Dev would move to the end of the stack.

8.2.1.2. Call Transfer



HTML & iframes are not visible in the CMS

For security reasons, iframe and HTML blocks are only rendered on your published documentation site, not in the Content Management System.

'Call Transfer' in our Dashboard allows your agents to transfer incoming calls to another agent or a group.

If you haven't checked on how to do I transfer an incoming call to a co-worker? please refer to this article.

How does it work?

An agent who is active on a call can click on the 'Transfer' button to select another agent or group.

The screenshot shows the Exotel dashboard interface. At the top, there's a header with the Exotel logo and three main navigation buttons: 'Call', 'SMS', and 'Call Transfer'. On the left, a sidebar lists various call-related items under the 'CALLS' section, with 'Inbox' currently selected. The main area displays a modal window for transferring a call. The modal is titled 'Transfer call to ?' and contains two radio button options: 'Agent' and 'Group'. The 'Group' option is selected. Below each option is a text input field for specifying the recipient. At the bottom of the modal is a prominent blue 'Transfer' button.

Also, note that in the drop-down while selecting the agent the list will show only the agent who is not on call from the Exotel dashboard (idle status) Only free agents who are visible are selected. If an agent is busy on another call, their name would not appear.

Groups that do not have any agent present (empty) or all agents are offline cannot be used for transfer.

All group transfers have queuing enabled by default with Exotel's default Queue Music and a maximum wait time of 30 minutes. Queuing gets triggered if all agents in the group are busy when a transfer occurs.

The agent needs to disconnect the call once the free agent is selected. The customer will remain on call while the transfer attempt is made to the selected agent.

Voila! The transferred agent gets connected.

How to set it up?

Go to App Bazar in your left panel in your Exotel dashboard.

exotel

CALLSMSAPI Credentials

CALLS

Inbox

SMS

SMS Stats *Beta*

Templates *Beta*

Outbox

TOOLS

ExoVerify *New*

Campaigns

Campaigns *New*

Video Calls *New*

CONTACTS

Address book

Co-workers and Groups

ADMIN

App Bazaar

ExoPhones

SMS Configurations

App Bazaar

Installed AppsAvailable Apps

Install

Test out

Buy App

Connect

Install an App.

Apps allow you to control what happens on a call, such as forwarding the call to other people, taking voicemails, playing audio or text to the caller, and more. You can install apps from our app store in a click of a button.

Install Apps

Custom Apps

Create

NAME	EXOPHONES	CALL SETUP	APP ID	DELETE APP
Test Giridhari	None	Edit Call App	559838	

Click on Availiable apps

Call Transfer

Rs. 499/- per month

Try for Free

Call Transfer app to enable agents transfer customer calls. Supports call transfer to agents and groups with customization of messages.

You need to buy the 'Call Transfer app' from App Bazaar. You will be charged a monthly rental against each installation.

Call Transfer

Choose a name for this App...

Call Transfer

Configure the app:

- ☒ Record the call
- ☒ Enable Queuing (Valid only for group)
- ☐ Create Pop-up URL
- ☐ Add Passthru
- ☒ Add Call Flow

Greeting before call is transferred...

Read Text

Your call is being transferred, please wait while we connect your call to another agent.

[edit](#)

Greeting when transfer is unsuccessful (agent doesn't pick up)...

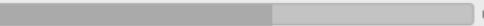
Read Text

Sorry, the agent you were trying to reach is unavailable at this moment.

[edit](#)

Queue Music when call is transferred to group (and no agent is available)...

Play Recording



[edit](#)

Maximum Wait Time in Queue (minutes)...

30

Transfer to a call flow if there is no further transfer...

[Transfer](#)

'Call Transfer App' allows your agents to transfer call to other agents. You can use this app to customize the workflow.

'Call Transfer' button will be enabled once this app is installed. Please follow the steps mentioned [here](#) to link this app in your call flows for it to work.

Greeting

Select the text/audio tone to be played during the call transfer.

Record the transfer call

If enabled, this would record the conversation between the customer and the transferred agent.

Create Pop-up URL

If URL is configured, it would request your endpoint (useful for CRM notification) when transferred agent is dialed and once dial attempt or conversation is over. Refer [here](#) for request parameters.

Passthru

Configure an endpoint to receive information about call transfer.

Transfer

Use this option to transfer the call to another flow at the end (if there was no transfer or transfer was successful).

Example - A call flow to take the feedback over an IVR.

Configure it using the App ID against the call flow, present in [App Bazaar](#).

Queue

Callers will be put in queue if agent selects the option transfer to a group and no agent is free to take the call.

Maximum wait time in queue will be 30 minutes.

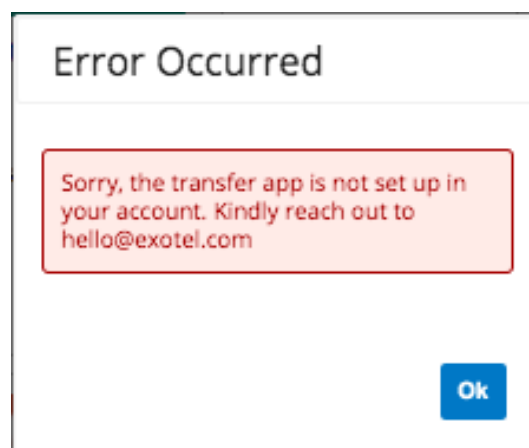
Save

Close

Configure the app based on your use case or continue with default.

- You can add 'Passthru' (webhook) to receive call data about the transferred attempt.
- You can add a 'Call Flow' (like IVR feedback) at the end if there is no further transfer i.e. conversation occurred without any transfer OR conversation occurred after a transfer attempt. Do note, that no further transfer will be allowed once the call reaches this flow.
- You can enable queuing so that the calls are queued if all the agents in the transferred group are busy.
- You can have the pop-up URL to intimate the calls for the transferred agent in the CRM
- You can choose to record the transferred calls and the same can be found on the dashboard

Once the app is installed, follow the configuration steps below to allow the transfer. Otherwise, you may get the below error.

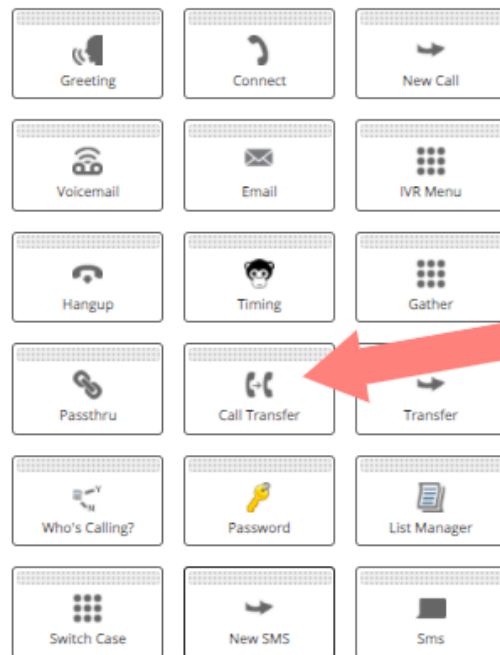


How to configure Exotel's Call Transfer Applet?

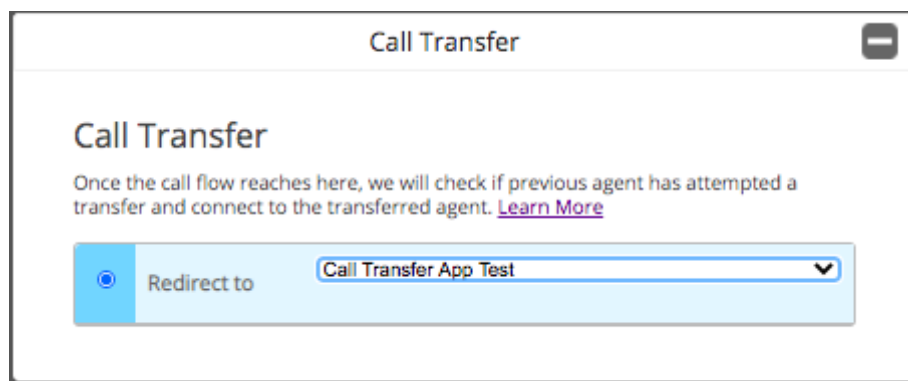
Once, the call transfer feature is enabled for your account, the call transfer applet will appear. However, to make it work for your incoming calls, follow the steps below to edit the call flows:

- Go to 'App Bazaar' and edit the call flow where you want to enable the transfer capability.

Voice Applets



Edit the 'Connect Applet' exit path of 'After the call Conversation ends' and drag the 'Call Transfer' applet.



Select the app name from the dropdown.

Follow the same method for other call flows or connect applets in your account wherever transfer is required.

FAQs

What types of call transfers are supported?

Currently, only 'blind transfer' (aka 'cold transfer') is supported where the agent needs to disconnect the call and the customer gets connected to another agent.

How many times can a live call be transferred?

Currently, a live call can be transferred between agents up to 25 times.

Can I transfer a call to a group?

Yes, if you have installed the transfer app from our App Bazaar.

Such a call transfer would automatically have queuing enabled and routing would be sequential.

Will there be multiple recordings for a transferred call?

Yes, if the recording is enabled in the call flow and transfer app, all such recordings will be accessible via Inbox under one call reference id.

Can I set up a transfer feature using Exotel in my CRM?

Yes, using our flow builder and Connect Applet can be used. Refer to this for more information.

Can I download a report for transferred calls?

You can download normal call reports from our dashboard which would contain information only about the first call. The price details section will contain information about multiple legs.

The agent report, however, will contain the complete information of such calls.

Can I find transfer calls in my Inbox?

The screenshot shows a search interface with a search bar containing 'call_type:transfer'. Below the search bar is a filter panel with the following sections:

- Filter your search**
- Call time period**: A dropdown menu with 'All' selected.
- ExoPhone**: A dropdown menu with 'Select your option...' selected.
- Call Direction**: A dropdown menu with 'All' selected.
- Call Type**: A dropdown menu with 'Transfer x' selected. Below this dropdown is a list of checkboxes:
 - ☐ Client-Hangup
 - ☐ Agent-Hangup
 - ☐ Missed-Call
 - ☐ Call-Attempt
 - ☐ Completed
 - ☒ Transfer

At the bottom right of the filter panel is a 'Search' button. To the right of the filter panel is a vertical list of circular icons, some of which are filled.

Yes, in Inbox you can filter 'transfer' calls and view the transcription as well.

Is this available for Outgoing Calls?

Currently, this is not available for outgoing calls.

8.2.1.3. Dial Whom in the Connect Applet

Connect

Dial Whom

☐ Dial a user or group

Select a Group

☐ Dial phone number(s):

DND Check

Like 08088919888
or a comma separated list like 08088919888,08049114900

Note: Calls to DND number will be blocked if it is not whitelisted
[How to Whitelist DND numbers](#)

☒ Dial phone number(s) returned by URL:

Primary URL:

Fallback URL(Optional):

☒ Fetch numbers after every call attempt

[Click here for the list of parameters](#)

In the 'Dial Whom' section of connect applet, you can configure an incoming call to a group, add static numbers or provide a URL from where you can get a number to be dialed by the way of an HTTP GET request.

The following are the query parameters of the GET request if you choose to return numbers from a URL. Note that only some of this list may be passed to your application - depending on what stage of the flow you have placed the applet.

Query Parameters

Parameter Name	Description
CallSid	Unique identifier of the call
Callfrom	In case of an outgoing call, it'll be set to the number from which the call is made. In case of an incoming call, it'll be set to the number from which the call is received
CallTo	In case of an outgoing call, it'll be set to the number being dialed out. In case of an incoming call, it'll be set to the number where the call landed.
CallStatus	The status of the call depends on what stage it is at. Possible values: 'queued', 'ringing', 'in-progress', 'completed', 'busy', 'failed', 'no-answer', 'canceled'
Direction	The direction of the call. Possible values: 'incoming' or 'outbound-dial'
Created	Timestamp when the call is created
DialCallDuration	Value in seconds from the time the call is triggered to the second leg of the call till it is over (including conversation time). This value can be set to zero depending on the previous applet and if there's no second leg in the call flow.
StartTime	Timestamp when the call is started
EndTime	1970-01-01 05:30:00 // Unix time (also known as POSIX time or epoch time) Note that this would be a constant value and you may instead trigger our Call details API a few minutes after the call has been completed to get accurate information
CallType	Scenario Value IVR only, no connect applet call-attempt Call conversation happened completed The client hung up during connect applet client-hangup Connect applet, no agent picked up incomplete Went to voicemail applet voicemail
DialWhom Number	Displays the number of the agent who was dialed to last
From	In case of an incoming call, it is the number of the caller. In the case of an outgoing call, it is the number of the first leg of the call.
To	In case of an incoming call, it is the ExoPhone on which the call landed. In case of an outgoing call, it is the number on which the call was made to.
CurrentTime	Current server time (format : yyyy-mm-dd hh:mm:ss)

*These parameters will be passed if certain conditions are met as described below:

Parameter Name	Description
DialCall Status	This will denote what happened with the second leg of the call for subsequent requests to your connect application URL (in case of multiple attempts) or if the previous applet itself was “connect”. This is to provide you information about the call status of the previous attempt particularly in case your application URL returns comma-separated numbers (N1, N2 ...) Possible values: 'completed', 'busy', 'no-answer', 'failed', 'canceled'
digits	‘digits’ will be passed if there was a 'Gather' or 'IVR' applet before this applet and will be equal to the input digits that were entered. NOTE: This parameter comes with a double quote (") before and after the number. You'll have to trim() this parameter for double quotes (") to get the actual digits.
Custom Field	If the call was initiated via API, the value that was passed in CustomField in the API call will be set here.
RecordingUrl	This will be populated if the previous applet was "voicemail". It will contain the URL of the voicemail recording. There could be a delay before the recording can be accessed depending on the length of the recording file.

NOTE: Some of these parameters like digits will only be passed in the first request of 'Dial Whom' and subsequent requests (if any) will contain the result of the previous connect applet attempt.

Deprecated parameters

The following parameters have been deprecated and are no longer supported. Some of these values might be passed inadvertently and applications should not rely on them anymore.

RecordingAvailableBy
ForwardedFrom
ProcessStatus
tenant_id
flow_id
numbers

Expected Response:

Your application URL response must:

- have only the phone number in the response body and nothing else.
- have comma-separated numbers, in case you wish to provide multiple numbers.
- content-type to be set as 'text/plain' with HTTP code set as 200

For example:

+919900XXXXXX

+919900XXXXXX,+919800XXXXXX

Note: Please provide numbers in E.164 format.

If the previous attempted number didn't connect, **'Fetch Numbers after every call attempt'** comes into play. This option will be checked by default as shown above and your application URL will be requested subsequently after an attempt for giving the flexibility of dynamically controlling the number(s) to be dialed out. You can return the same set of numbers as well, and Exotel will attempt each unique number. Once, all the returned number(s) have been attempted at least once (in case no one picks up), it'll transition to the next applet. You can also choose to uncheck this option. In this case, your application URL can be configured to return number(s) to be dialed in a single request and Exotel will attempt all the numbers provided one by one until someone picks up or all attempts are exhausted. We recommend you to use this method unless you have a use case to dynamically return numbers based on each call attempt.

Fallback URL

This parameter is optional and is valid if you configure the connect applet to return numbers using your application endpoint (set under Primary URL).

Scenarios when we will request your Fallback URL to return numbers:

- If your primary URL responds with a non-200 HTTP code (like 4XX, 5XX)
- If your primary URL is not reachable and times out (doesn't respond within 10 seconds)

Scenarios where Fallback URL will NOT be triggered:

- If your application URL responds with HTTP code 200 but doesn't return any numbers
- If your application URL responds with HTTP code 200 but returns invalid numbers or values

8.2.14. Voice over recording

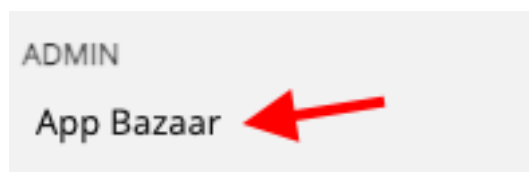
Voice-over recordings are available only for Full paid accounts. If you are on a trial account, you can check out the list of pre-recorded voice messages in the Audio Library (You need to be logged in to your Exotel account to access this).

Professional voice-over is one of the services offered by Exotel. At Exotel, we understand that not all companies have in-house voice artists, and we would like to help you project a professional image.

How to request a professional voice-over recording?

You can request a voice-over to be done by our professional artist. To do so, you need to

1. Login to your Exotel account, go to the AppStore page under the admin section.

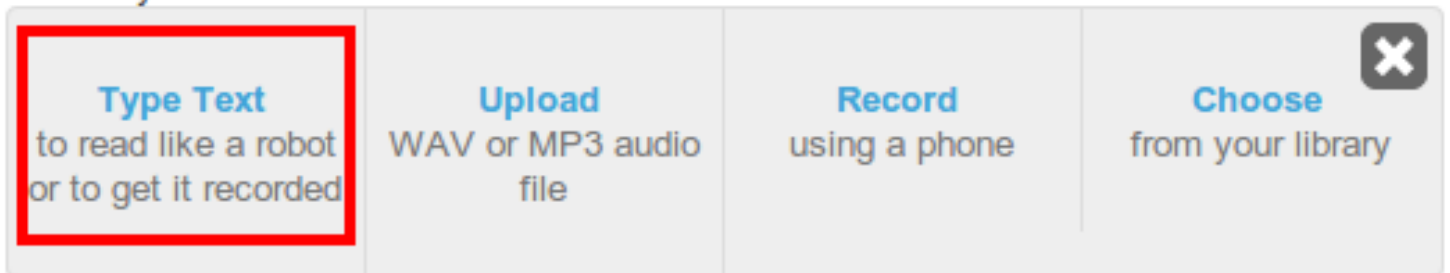


2. Open the app by clicking on "Edit call app"



3. Move to the Greeting applet or Menu applet for which you want the recording done

Greet my callers with...



4. Click on the applet and enter the text to be recorded and click on "Get this text Recorded".

Greeting



Audio Choice

When the caller reaches this prompt, they will hear:

Read Text like a robot...Learn more about [how this will sound](#)

You can also put a URL above that returns plain text which will be read out

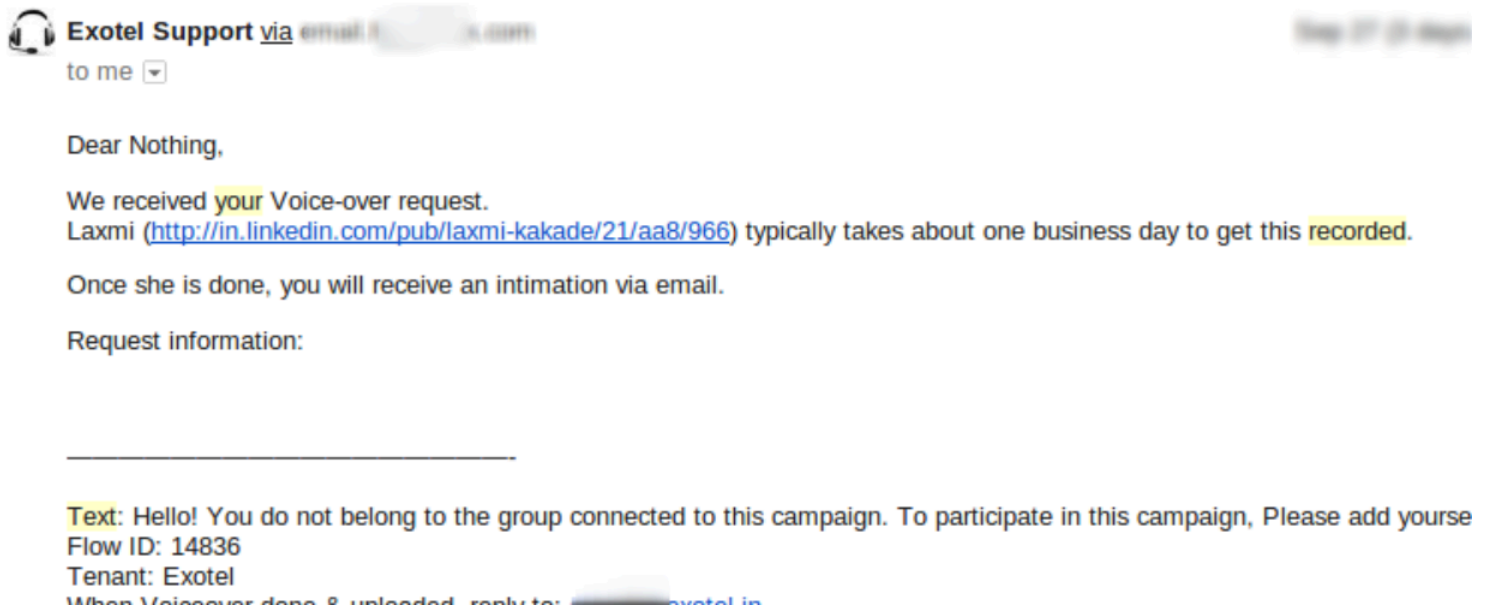
Get this text Recorded

Save

Our voice-over artist will be notified and your request will be served within 24-48 working hours.

Notifications

On clicking the "Get this text recorded" button - You will receive a notification from Exotel in your email which looks like this:



Once the artist finishes the recording, they will upload it at the corresponding part of the same app from where you requested the recording. After which you will receive an email that looks like this:

We got that done! 

 **Exotel Support via** 
to me 

See all messages  

Dear Nothing,

Your voice over request has been processed. You can listen to your voice over by clicking on 'Edit Call App' in your 'Installed Apps' page.

Regards,
Laxmi

Now, login to your account, Go to "App Bazaar" and click on the flow with Flow ID (In this 14836) to listen to the recordings. In the case of readymade apps, You will be able to spot the app anyway

Where can I find the recordings?

All your recordings are available in your audio library if you wish to review them.

You can also access them from any flow/any applet by choosing the "Choose from library" option (the 4th option) in the applets like greeting, voicemail, menu, etc.

Pricing

- **Charges:** ₹ 600 per recording request with a maximum limit of 200 words. Every time you press "Get this text recorded", it is considered as one request and will cost ₹ 600.
- **Turn around time:** Takes 1 business day.
- **Languages supported:** English (Indian, American & British accent), Hindi, Tamil, Marathi

Can I download and reuse these recordings?

Once recorded, the recordings are yours. You can download them from the audio library and use it inside and outside Exotel. Also, you don't need to worry about the recordings going away when you change the flow as all these are available to use forever.

Debugging

If you find any problems in submitting content for voice-over, try reloading the page.

If that doesn't fix the problem, check if you have disabled Javascript on your browser.

8.2.1.5. Dynamic Audio Message

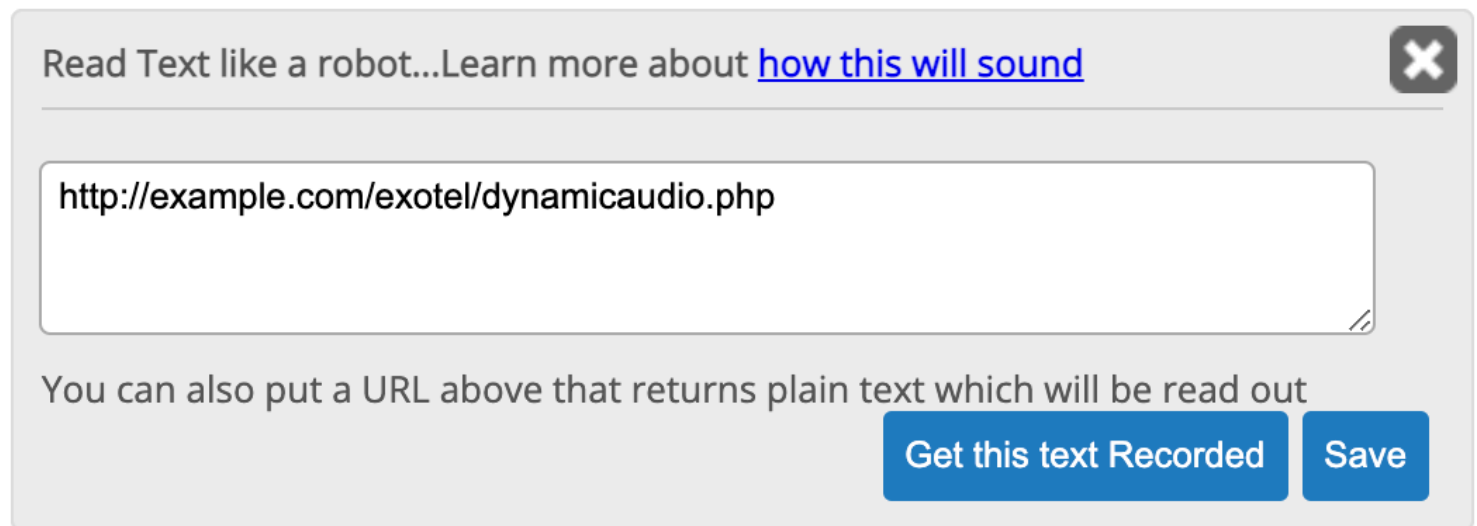
Many a time you may want to play out a dynamic audio file to the caller based on who's calling when they are calling, or based on their IVR inputs. In order to do that you need to do the following.

1. In the Audio picker, you need to choose the 'Type Text' option
2. Enter your application URL which will, in turn, return a URL of the Audio file.
3. The Audio file MUST be in the .wav, .mp3, 8Khz Mono format. The bit depth must be 16 bits.

All other formats are **not** supported (eg. 16Kz Mono/Stereo etc)

Example

In the 'Type Text' option of the audio picker, we have configured a URL



The screenshot shows a web interface for configuring an audio message. At the top, there's a header "Read Text like a robot...Learn more about [how this will sound](#)" with a close button (X) on the right. Below this is a large text input field containing the URL "http://example.com/exotel/dynamicaudio.php". Underneath the input field, there's a message: "You can also put a URL above that returns plain text which will be read out". At the bottom right, there are two blue buttons: "Get this text Recorded" and "Save".

When Exotel makes an HTTP GET to this URL

```
http://example.com/exotel/dynamicaudio.php
```

the HTTP response should

- Contain this header: `content-type: text/plain`
- HTTP body must have the wav file URL one in each line

```
http://example.com/first-audio.wav
```

```
http://example.com/second-audio.wav
```

Exotel will then download and play the audio files one after the other to the person on the call.

Caching of the audio files

Exotel caches the audio files that it downloads and plays - so that the next time you send the same file, we don't need to download and it will be faster.

Exotel caches the file based on the **name of the URL**. So if case you are changing first-audio.wav, you will need to send in another name the next time (Ex: `http://example.com/first-audio-new.wav`)

Conversion of audio files from any format to the required format

If you're on Linux, you can use ffmpeg to convert any audio file to the file format accepted by Exotel using the below command:

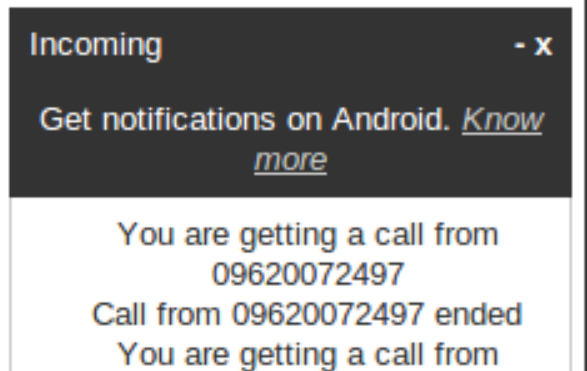
```
ffmpeg -loglevel quiet -y -i /path/to/audiofile -ar 8000 -ac 1 /path/to/target.wav
```

Explain Shell has a good explanation of what these options to ffmpeg mean: [http://explainshell.com/explain?cmd=ffmpeg+-](http://explainshell.com/explain?cmd=ffmpeg+-loglevel+quiet+-y+-i+%2Fpath%2Fto%2Faudiofile+-ar+8000+-ac+1+%2Fpath%2Fto%2Ftarget.wav)

[loglevel+quiet+-y+-i+%2Fpath%2Fto%2Faudiofile+-ar+8000+-ac+1+%2Fpath%2Fto%2Ftarget.wav](http://explainshell.com/explain?cmd=ffmpeg+-loglevel+quiet+-y+-i+%2Fpath%2Fto%2Faudiofile+-ar+8000+-ac+1+%2Fpath%2Fto%2Ftarget.wav)

8.2.1.6. CRM Popups

Exotel provides popup notifications for both incoming & outgoing calls. As soon as I come to office, I login to exotel and then I get notifications like this everytime I get a call:



An interesting use of this popup is that if your addressbook has the name of the customer calling, then it automatically shows up in the popup. Using this, you could now say something like: "Thank you kumar for calling my company, How can I help you?". This personalized service delights your customer!

Now, lets say you have your own CRM, then you could attempt to implement your own popup service inside your CRM using the "**Create popup...**" option in your connect applet. It looks like this:

Create popup...

When dialling multiple agents in a call, Exotel will pass on the details of the currently active agent to this url. You can create a popup in your CRM using these details. Please host this URL on your server.

You put in a URL that will receive a HTTP Get request just before sending an call to an agent number. The parameters that you would get are explained here.

This is how the flow of control would be:

Customer calls -->

Exotel receives call -->

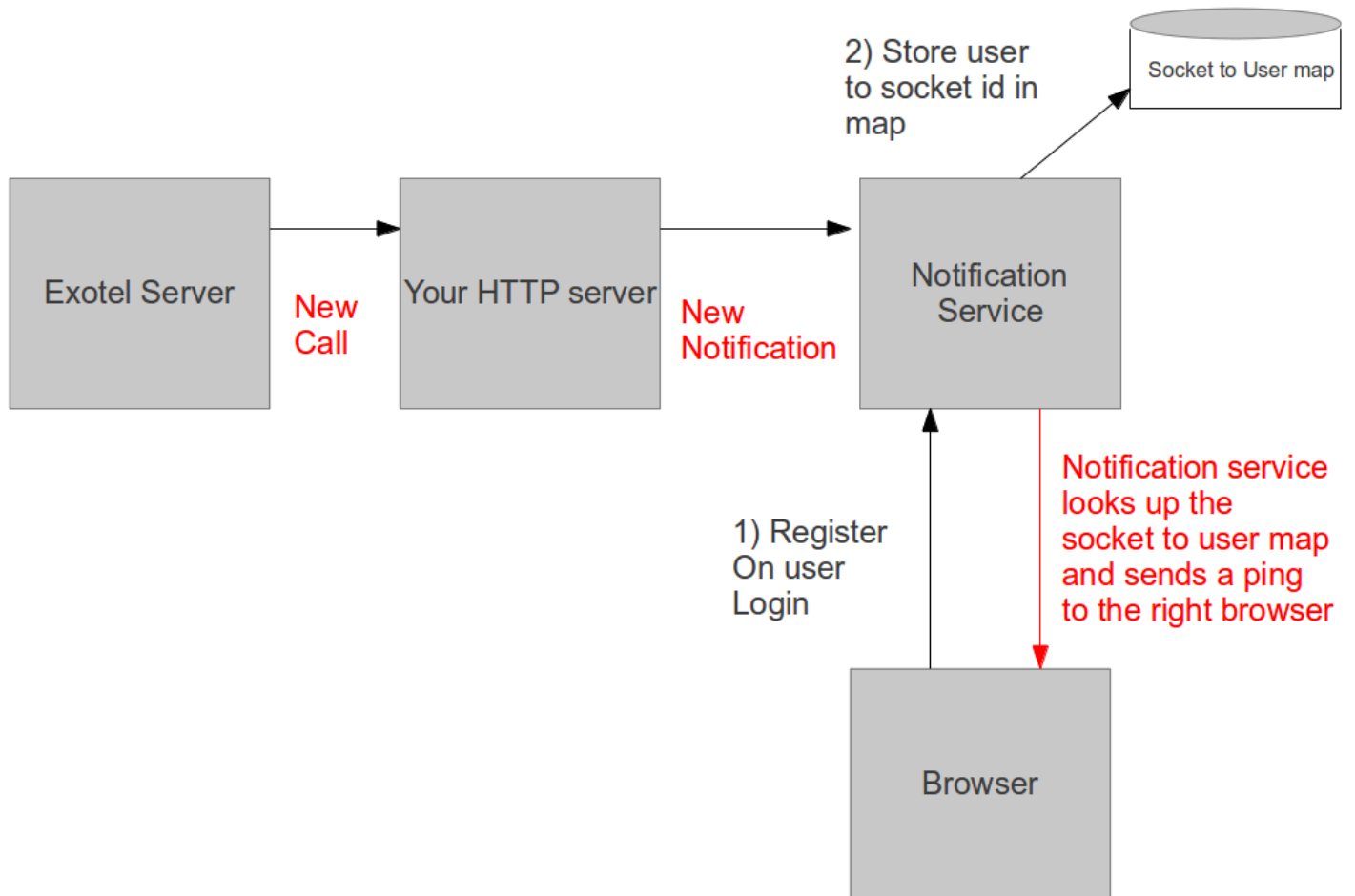
Exotel GETs your URL & simultaneously sends the call to your agent -->

You push popup to your client on agent's laptop.

Example Tech stack that would be required to popup information in real time:

1. Node.js service that maintains a socket to user map like shown in the diagram below and does something on receiving an event to be sent to the browser in real time.
2. Socket.io on the server (for interacting with the browser) + browser (in-order to receive real time notifications)

3. Some browser side js/css code to pop-up or alert the notifications (the chat style pop up)



8.2.17. Call Queuing

Call Queuing is a feature that places your customers in a virtual call queue when all of your agents are occupied on other calls. This feature is not mandatory, as you can choose to offer other alternatives to your customers, such as apologizing and hanging up or ending the call and sending an SMS message stating that all agents are currently occupied and will return the call as soon as possible.

In the Connect applet, it is represented in the following manner:

If all agents are busy...

Queue the caller?	☒		
Play this message to the folks placed on queue:			
Type Text to read like a robot or to get it recorded	Upload WAV or MP3 audio file	Record using a phone	Choose from your library
+			
Max wait time in queue:	5	minutes (Blank for unlimited)	

Type text: just let Robocop speak for you or get it recorded (Get it recorded)

Upload WAV or MP3 file: while their call waits to be connected to your agents. Just upload a .MP3 or .WAV file and choose this option (**Note:** The max size of the file should be 2MB)

Choose from your library: Choose from your Library

If all agents are busy...

Queue the caller?	☒
Play this message to the folks placed on queue: Read Text/URL like a robot... If it's an URL, the URL should return plain text which will be read out. All our agents are busy attending other customers. Your call is important to us. Please hold the line and we will connect your call to the next available associate. Example of an URL: http://example.com/exotel/readtext.php Get this text Recorded Save	
Max wait time in queue:	5 minutes (Blank for unlimited)

Suppose you are attempting to connect to the "Sales" group via the Connect applet, but all of the agents in the group are currently engaged in conversations with other customers, causing the next caller to be placed in a queue. Prior to entering the queue, the caller will hear a message stating, "All of our agents are presently engaged with other customers. Your call is important to us. Please hold the line, and we will connect you to the next available associate." Once the caller has entered the queue, they will hear music for a maximum of five minutes.

During these five minutes, if any of the agents in the "Sales" group complete their conversations, the caller will automatically be removed from the queue and connected with the available agent in a "first in first out" order. It should be noted that if there are no active agents in the "Sales" group or if the agents' device status is "off" or if their phones are unreachable, Exotel will not put the caller in the queue as there may not be an available agent to answer the call.

8.2.1.8. Custom Music on Hold

To give you greater control over call experience, Exotel now offers the ability to put custom music on hold (MOH) on every flow. This option exists in the connect applet (see below).

☒

Dial phone number(s):

DND Check

Like 08088919888
or a comma separated list like 08088919888,08049114900

Note: Calls to DND number will be blocked if it is not whitelisted
[How to Whitelist DND numbers](#)

☐

Dial phone number(s) returned by URL:

Primary URL:

Fallback URL(Optional):

☒ Fetch numbers after every call attempt

[Click here](#) for the list of parameters

Record this call?	☐
Limit ringing duration to:	seconds (Default: 30s)
Limit conversation duration to:	mins (Blank for 4 hours)

Music on hold ?

☒ Default Tone

▶

0:00 / 0:00

🔊

⋮

☐ Operator Tone

☐ Custom Tone

Music on hold [?]

☒	Default Tone	▶ 0:00 / 0:00 — 🔊 ⋮
☐	Operator Tone	
☐	Custom Tone	

The three options that Exotel is offering are:

1. **Default MOH** - You could choose for your callers to hear the default MOH that Exotel has created. Preview the sample by clicking the play button next to the option.

Music on hold [?]

☒	Default Tone	▶ 0:00 / 0:00 — 🔊 ⋮
----------------------------------	--------------	---------------------

2. **Custom MOH** - You could now also choose for your callers to hear a custom MOH while their call waits to be connected to your agents. Just upload a .mp3 or a .wav file and choose this option.

Music on hold

☐	Default Tone
☐	Operator Tone
☒	Custom Tone Audio from URL Link to the URL having audio file Upload WAV or MP3 audio file

3. **Operator tone** - Feel old school? Exotel also gives you the possibility of letting callers hear the operator's tone. This comes with a caveat though, we do not recommend this option if you have more than one agent as it could lead to a bad customer experience! **This is only available when you are dialing in to a phone number/url. In case of dialing into a group, this option is not available.**

Music on Hold ?

☐	Default tone
☒	Operator tone <i>Note: For multiple agents operator tone is not recommended. You can go with other Options</i>
☐	Custom tone

How to use MOH like pro?

- When using the Custom MOH option, ensure your sound file is .mp3 or .wav.
- Only use the operator tone for a seamless experience, if you are connecting the call to one agent/phone number. Using it with multiple agents could lead to a bad user experience in case one of your agents' phones is not reachable/busy due to operator issues.

8.2.1.9. The Call Takes Too Long to Move to the Next Agent

By default, the connect applet is configured by default to ring for 30 seconds before trying the next available number.

To reduce this duration,

- 1) Identify the app with the call flow that is connecting your calls
- 2) Click on the 'Edit call app' on the App Bazaar -> 'Installed Apps' section
- 2) Navigate to the Connect applet

Call Start

When a call begins, what should we do?

Drag an applet from the right to get started.


 Connect

Connect

How do you want to control your Connect params?

☒ Configure using flow builder here

Configure parameters dynamically by providing a URL

Primary URL: *

Fallback URL (optional): ⓘ

[Click here](#) for the list of parameters and how they can be cont

Dial Whom

☒ Dial a user or group

Support and Sales Desk

Record this call?	☒
Recording Channels? Beta ?	☒ Single ☐ Dual
Sticky agent? ?	☒
Limit ringing duration to:	15 seconds (Default: 30s)
Limit conversation duration to:	mins (Blank for 4 hours)

Music on hold ?

☒ Default Tone

▶

0:00 / 0:00

🔊

⋮

☐ Custom Tone

Create new ring

3) You can now set the 'Number of seconds to ring the agent's phone before trying the next person' field to a shorter duration (say 15 seconds)4) Click 'Save' and 'Close'

8.2.110. Dial Gathered Digits

The Connect Applet can be configured automatically to call the number using the digits (DTMF) entered by the user on call. This feature is only available on demand.

You need to raise a request to your account manager or hello@exotel.in to enable it.

Dial Whom

☒ Dial the gathered number

☐ Dial a user or group

Select a Group
 

☐ Dial phone number(s):

DND Check

Like 08088919888
 or a comma separated list like 08088919888,08049114900

Note: Calls to DND number will be blocked if it is not whitelisted
[How to Whitelist DND numbers](#)

☐ Dial phone number(s) returned by URL:

Primary URL:

Fallback URL(Optional):

☒ Fetch numbers after every call attempt

[Click here](#) for the list of parameters

Note: Call Flow should be a [Gather Applet](#) followed by [Connect Applet](#).

Limitations:

- Supports dialing to Indian Numbers only in local format i.e. 099XXXXXXXX or 99XXXXXXXX
- It will only work if the Connect Applet is immediately present after Gather Applet.

8.2.1.11. Changing the Order of Agents in a Group

1. Go to the 'Co-workers & Groups' page under 'Admin' on the left navigation.
2. Click on the group name on the right. You will see all the agents present in the group in order.
3. You can now re-arrange the order of the agents by dragging and dropping them within the group.

The screenshot shows the exotel Business Phone System interface. The left sidebar has a navigation menu with 'Co-workers and Groups' highlighted. The main area is titled 'Co-workers and Groups' and contains two sections: 'My co-workers' and 'Groups'. The 'My co-workers' section shows a grid of agent cards with their names, phone numbers, and status (e.g., 'ON CALL', 'IDLE', 'OFFLINE'). The 'Groups' section on the right is highlighted with a red box and contains a list of groups with their names, total users, and status. The groups listed are 'Support_Number_Misc' (Total Users: 4) and 'Support_Number_Misc' (Total Users: 4). The 'Support_Number_Misc' group is selected, showing its status (0 QUEUED, 1 ON CALL, 1 IDLE, 2 OFFLINE) and a 'Select a group to view the user list.' prompt.

4.

Eg: let's say you have 3 agents in the order 'A', 'B' and 'C'. You can now drag agent 'C' and place it above agent 'A' to change the order to 'C', 'A', and 'B'.

After re-arranging, the sequential calls to this group will first go to agent 'C'. If 'C' is busy or OFF then it will go to 'A' and so on.

8.2.2. Passthru Applet

Using the Passthru applet in the call flow you can get Exotel to talk to your Application URL and pass on details about the call as and when it happens. Your application can now process this information and decide which path (success/failure) the flow should take next. This applet helps to dynamically control the flow as well as store the call details in your CRM system or other applications.

Passthru
⊞

Information Pass Through

When the call reaches this menu, Pass info through to this url:
Use this applet to send info to your CRM or Support software. [Learn more](#)

Options

Make Passthru Async	☐
---------------------	--------------------------

In response

Once the URL returns OK ([200 OK](#))...

Drop applet here

If the url returns anything else..
Like 404 Not found or 302 found etc?

Drop applet here

The Passthru applet passes the call details to the URL configured. It makes a GET request to the URL with the call details as URL-encoded HTTP query parameters.

Passthru Modes

Passthru can be used in 2 modes (by toggling the checkbox to 'Make Passthru Async'):

- **Sync:** Exotel will immediately pass the call details synchronously during the call flow execution. In this case, it is possible only to make a binary decision with Passthru. For example, You can return back a "200 OK" for choice A and "302 Found" for Choice B. Read more about HTTP response codes here. Please note, that the person on call will have to wait for the next action to be executed until your URL responds back.
- **Async:** Exotel will asynchronously pass the call details without interrupting the call flow execution. Use this option if you don't want to dynamically change flow execution i.e. select the next applet based on Passthru response. This will ensure the person on call doesn't wait for the time period it takes for Passthru to be executed i.e. your URL to respond back.

Query Parameters

The following are the query parameters of the GET request. Note that only some of this list may be passed to your application - depending on what stage of the flow you have placed the pass-through applet.

Parameter Name	Description
CallSid	Unique identifier of the call
CallFrom	In case of an outgoing call, it'll be set to the number from which the call is made. In case of an incoming call, it'll be set to the number from which the call is received
CallTo	In case of an outgoing call, it'll be set to the number being dialed out. In case of an incoming call, it'll be set to the number where the call landed.
CallStatus	The status of the call depends on what stage it is at. Possible values: 'queued', 'ringing', 'in-progress', 'completed', 'busy', 'failed', 'no-answer', 'canceled'
Direction	The direction of the call. Possible values: 'incoming' or 'outbound dial'
Created	Timestamp when the call is created
DialCallDuration	Value in seconds from the time the call is triggered to the second leg of the call till it is over (including conversation time). This value can be set to zero depending on the previous applet and if there's no second leg in the call flow.
StartTime	Timestamp when the call is started
EndTime	1970-01-01 05:30:00 // Unix time (also known as POSIX time or epoch time) Note that this would be a constant value and you may instead trigger our Call details API a few minutes after the call has been completed to get accurate information
CallType	Scenario Value IVR only, no connect applet call-attempt Call conversation happened completed The client hung up during connect applet client-hangup Connect applet, no agent picked up incomplete Went to voicemail applet voicemail
DialWhom Number	Displays the number of the agent who was dialed to last
From	In case of an incoming call, it is the number of the caller. In the case of an outgoing call, it is the number of the first leg of the call.
To	In case of an incoming call, it is the ExoPhone on which the call landed. In case of an outgoing call, it is the number to which the call was made.
CurrentTime	Current server time (format : yyyy-mm-dd hh:mm:ss)

*These parameters will be passed if certain conditions are met as described below:

Parameter Name	Description
DialCallStatus	This will denote what happened with the second leg of the call if the previous applet was “connect”. Possible values: 'completed', 'busy', 'no-answer', 'failed', 'canceled'
Legs	An array that will denote detailed information about each leg attempt if the previous applet was “connect”. Sample: Legs[0][CauseCode]=NORMAL_CLEARING Legs[0][Cause]=16 Legs[0][Type]=single Legs[0][OnCallDuration]=21 Legs[0][Number]=07200498123 Meaning: - Legs[i]: i denotes the index of the attempt in the Connect applet. If there are multiple numbers attempted, the array's length will be equal to the total attempts. - CauseCode: Cause code enum of the call as derived from the ISDN cause code returned by the carriers. A list of CauseCode can be found here - Cause: Numeric representation of the CauseCode. A list of Causes can be found here - Type: single or parallel - OnCallDuration: Time spent by the leg on call. This value could be 0 if there was no conversation with the attempted leg. - Number: Phone number of the attempted leg
digits	'digits' will be passed if there was a 'Gather' or 'IVR' applet before this applet and will be equal to the input digits that were entered. NOTE: This parameter comes with a double quote (") before and after the number. You'll have to trim() this parameter for double quotes (") to get the actual digits.
CustomField	If the call was initiated via API, the value that was passed in CustomField in the API call will be set here.
RecordingUrl	This will be populated if the previous applet was "Connect" or "Voicemail". It will contain the URL of the conversation in the Connect Applet (if enabled) or voicemail recording. There could be a delay before the recording can be accessed depending on the length of the recording file.
OutgoingPhoneNumber	This will be populated if the previous applet was “connect”. It indicates which ExoPhone (Virtual Number) was used to dial out in the Connect Applet.

Deprecated parameters

The following parameters have been deprecated and are no longer supported. Some of these values might be passed inadvertently and applications should not rely on them anymore.

RecordingAvailableBy

ForwardedFrom

ProcessStatus

tenant_id

flow_id

Samples Responses for different scenarios.

Sample Response for a Completed call where the previous applet is a Connect Applet with Recording URL:

CallSid	56ad12c0e29d
CallFrom	086605
CallTo	080468
CallStatus	completed
Direction	incoming
Created	Wed, 27 Dec 2023 12:17:05
DialCallDuration	19
RecordingUrl	https://.../E...
StartTime	2023-12-27 12:17:05
EndTime	1970-01-01 05:30:00
DialCallStatus	completed
CallType	completed
DialWhomNumber	094490
flow_id	7
tenant_id	15
From	086605
To	080468
RecordingAvailableBy	Wed, 27 Dec 2023 12:22:26
CurrentTime	2023-12-27 12:17:26
OutgoingPhoneNumber	080468
Legs	[{"Number":"094490","Type":"single","OnCallDuration":"8","CallerId":"080468","CauseCode":"NORMAL_CLEARING","Cause":"16","DisconnectedBy":"Caller"}]

Sample Response for a Completed call where previous applet is a Gather/IVR Applet:

CallSid	b8013b5546750a
CallFrom	086605
CallTo	080468
CallStatus	in-progress
Direction	incoming
Created	Wed, 27 Dec 2023 12:26:25
DialCallDuration	25
RecordingUrl	https:// /E...
StartTime	2023-12-27 12:26:25
EndTime	1970-01-01 05:30:00
DialCallStatus	completed
CallType	completed
DialWhomNumber	094490
ProcessStatus	ready
flow_id	7
tenant_id	15
From	086605
To	080468
RecordingAvailableBy	Wed, 27 Dec 2023 12:32:01
CurrentTime	2023-12-27 12:27:01
digits	"15246"

3) Sample Response for a Completed call where the call was initiated via an API, with the value that was passed in CustomField of the API request.

CallSid	402cd0139019. [REDACTED]
CallFrom	086605 [REDACTED]
CallTo	080468 [REDACTED]
CallStatus	completed
Direction	outbound-dial
Created	Wed, 27 Dec 2023 12:53:35
DialCallDuration	35
RecordingUrl	https://[REDACTED]/E...
StartTime	2023-12-27 12:53:35
EndTime	1970-01-01 05:30:00
DialCallStatus	completed
CallType	completed
DialWhomNumber	094490 [REDACTED]
flow_id	7 [REDACTED]
tenant_id	15
From	086605 [REDACTED]
To	080468 [REDACTED]
RecordingAvailableBy	Wed, 27 Dec 2023 12:59:13
CurrentTime	2023-12-27 12:54:13
CustomField	Hello there
OutgoingPhoneNumber	080468 [REDACTED]
Legs	[{"Number":"09449 [REDACTED]", "Type":"single", "OnCallDuration":...

See Also [Is Passthru Slowing My Call Flow?](#)

The response you get from Passthru cannot be customised. However, you can add a Custom field via the Outgoing call to connect number to a call flow API.

Looking to streaming metadata using Passthru? Learn how to receive stream metadata in post-call [Passthru Applet](#)

8.2.2.1. Transfer Applet

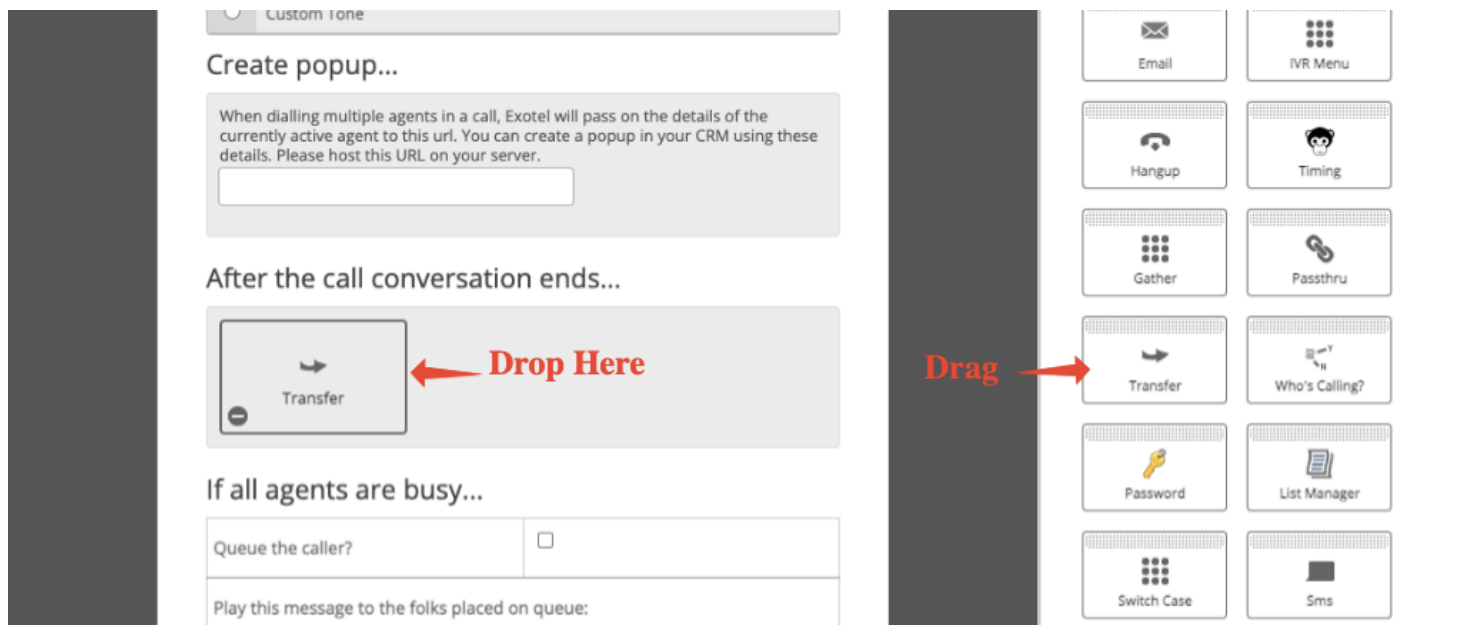
If you are returning numbers to dial via an endpoint in the Connect Applet, you can enable your agents to transfer calls in your CRM/Dashboard.

All you need to do is:



Create a new call flow with 'Connect' applet and your endpoint which will return a number of transferred agents. You can configure this call flow further by adding greeting, pass-thru, etc. depending on how you'd like to handle a transferred call. Go to 'App Bazaar' and edit the call flow which you want to enable the transfer capability.

1.



Edit the '**Connect**' Applet' exit path of 'After the call Conversation ends' and drag the '**Transfer**' applet.

Transfer



Transfer

Continue this flow by starting another flow

☒ Redirect to

test

Choose the call flow created in step 1 to transfer the call

Select the newly created app.

Now, if your agent transfers the call in your CRM/Dashboard, the request to your endpoint in the transferred call flow can return the agent's number to dial otherwise hangup. (Agent must disconnect the call first inorder to initiate the transfer applet)

8.2.2.2. Is Passthru Slowing My Call Flow?

When there are a lot of Passthru on your call app, there is a distinct possibility that your callers might have to wait more on call.

The reason is that for each Passthru, Exotel will make an HTTP GET request to your server, and wait for a response from your end. In case your server does some processing like storing it in a database or calling some other services (like CRM services in turn), the response to Exotel will get delayed.

However, if in case your call logic doesn't depend on the response from your CRM, you can select the **"Make Passthru Async"** option in the applet. Upon selecting this, our system will not wait for a response but will continue on the call logic, thus, there will be no delay on the calls.

a call begins, what should we do?

Drag an applet from the right to get started.



Passthru

Information Pass Through

When the call reaches this menu, Pass info through to this url:
Use this applet to send info to your CRM or Support software. [Learn more](#)

Options

Make Passthru Async	☒
---------------------	-------------------------------------

Logging

Please log all HTTP requests coming from Exotel to your Passthru URL and keep logging how long they take. By periodically monitoring the average processing times at your end, you will be able to detect any increase in processing times.

How to design your Passthru HTTP endpoint?

Ideally, make sure that any processing you do is asynchronous.

For example - as soon as you get an HTTP GET request from Exotel, enqueue it to some queue and return an HTTP '200 OK' back to Exotel as soon as possible. In the background, dequeue the messages and do whatever you need to do - like updating your database, informing your CRM system, etc.

This way, Exotel can get back to processing the next part of your app and your callers will not be waiting for long.

8.2.3. Voicemail Applet

Voicemail applet, as the name suggests, takes a voicemail (A digitally recorded message when the caller is unable to reach the callee). All the recordings will be made available in the inbox of the particular group which was selected in the 'Take Voicemail' section at the time of configuring this applet.

Voicemail:

- You can upload a message or use our type to text feature to prompt the callee to leave a message and provide him information about the finish key to end the recording.
- Voicemail will always play a beep before getting into its job of recording.
- Finishes by default on the "#" key. That is the user has to press "#" for the recording to be completed, once done then the flow moves on to the next applet if any. You also have the option to change the default key.
- The maximum length of voicemail recording is 1 hour. Currently, there is no way to increase this. Of course, we haven't yet encountered anyone who has spoken to a call recorder for a full hour!
- If there is silence for 5 seconds, Voicemail will wrap up and move on. So, if there is a recording exactly equal to 5 seconds, then it is likely that it is completely silent. If you are the one responsible for listening to all the voicemails & returning customer calls, you could choose to ignore listening to this one.
- And similarly, if the recording is less than 5 seconds, it is likely to be of no use as well.
- VoiceMail Recordings and Call Recording will go inside account specific folder, wherein for secure-recording enabled accounts, this folder would be in secure bucket, for other accounts it will be in unsecure bucket.

Voicemail

Prompt

What will the caller hear before leaving their message?

Type Text

to read like a robot or to get it recorded

Upload

WAV or MP3 audio file

Record

using a phone

Choose

from your library

Voicemail duration

Limit voicemail duration

seconds (Default: Unlimited)

Silence

Seconds of silence allowed before recording is stopped

seconds (Default: 15 Secs)

Take voicemail

Which individual or group should receive the voicemail?

Select a Group

Specify the Finish Key

The recording ends on clicking this key, or on hangup.

Key

Applet

Default: #

Then

Drop applet here

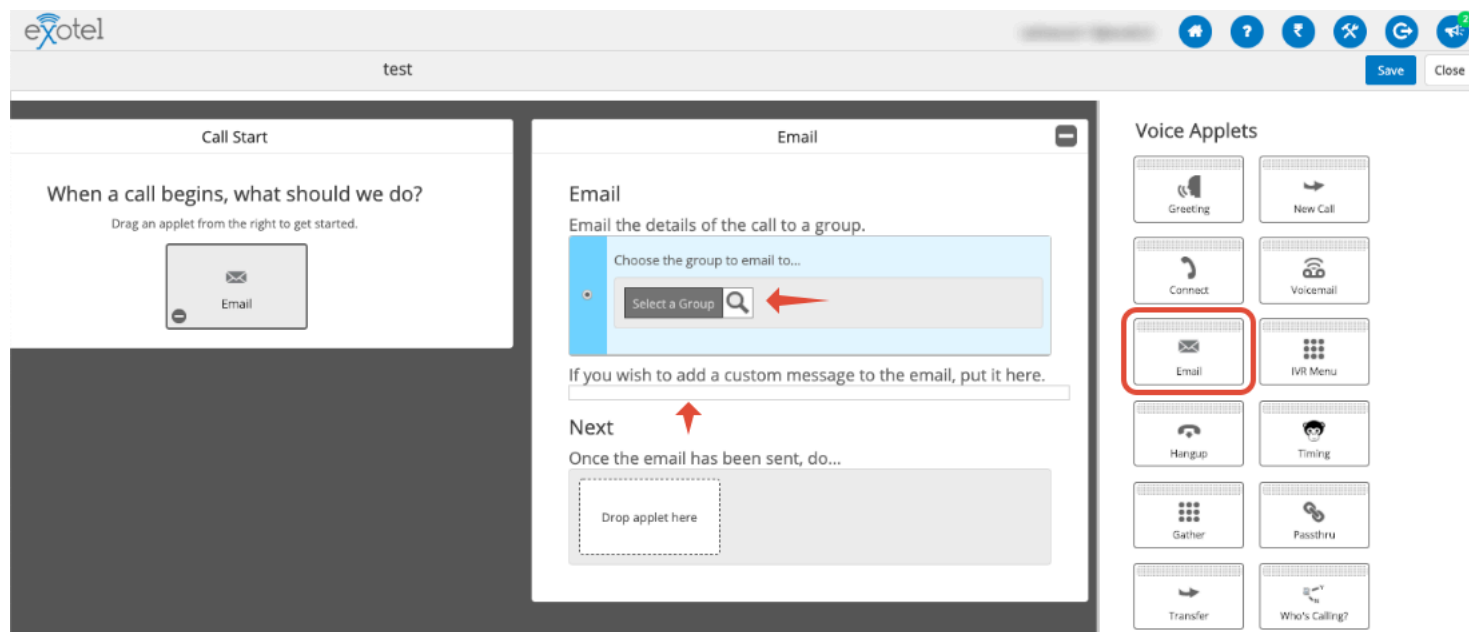
194 / 511

Business Phone System

Modified: 07/15/2026

8.2.4. Email applet

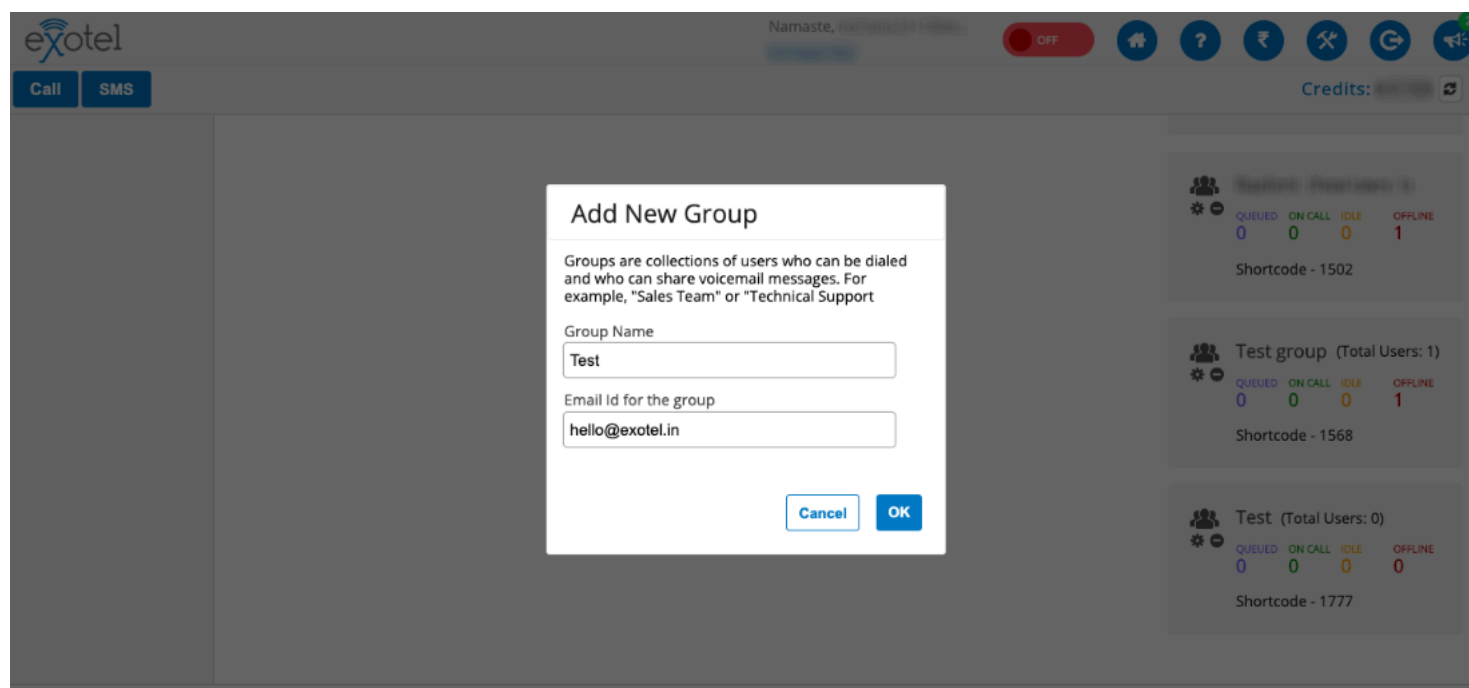
Use the email applet to send yourself or a group an email about the incoming call or SMS. It looks like this:



There are two options:

1. Which group to send an email to. For example - Use the Email applet after every Voicemail applet so that the group to which the voicemail gets taken for can also get intimated about the same.
2. If you would like to put some custom message in the email, Use the "Custom Message" text box. For example - You could now put a text there like "Support voicemail" and create a filter in your mail client to selectively send this message to someone else.

Please note that the email shall be triggered to the email ID of the group as shown below and not to the individual email IDs of the members in the group. So ensure you add the email ID under the group name.



If there are multiple email IDs, you can add them comma-separated.

8.2.5. List Manager Applet

List Manager enables you to subscribe phone numbers in & out of a list based on a caller action. On drag-drop into the "Drop applet here" box, The List Manager gives you two options:

- Choose a list
- Choose an action (Add or Delete)

In the following call flow, as soon as a call comes in, we are subscribing him to a list called "Test" and disconnecting the call. This app is an example of an Opt-In subscription.

The screenshot shows a call flow configuration interface. On the left, a 'Call Start' applet is shown with the text 'When a call begins, what should we do?' and 'Drag an applet from the right to get started.' Below this text is a 'List Manager' applet icon. On the right, the 'List Manager' applet configuration is shown. It has a 'List' dropdown menu with 'Test' selected, and an 'Action' dropdown menu with 'Add' selected. A red arrow points to the 'Add' option. Below the 'Action' dropdown is a 'Next' section with the text 'After adding or removing the number, continue to the next applet' and a 'Drop applet here' box.

You can also do advanced actions like capturing what the caller pressed in an IVR menu. For this, you will now create different lists for each key press and "add" the caller to that corresponding list depending on keypress. Something like this:

The screenshot shows a call flow configuration interface. On the left, a 'Call Start' applet is shown with the text 'When a call begins, what should we do?' and 'Drag an applet from the right to get started.' Below this text is an 'IVR Menu' applet icon. In the center, the 'IVR Menu' applet configuration is shown. It has a 'Menu Prompt' section with the text 'When the caller reaches this menu they will hear:' and a 'Menu Options' section. The 'Menu Options' section has a table with columns 'Keypress', 'Applet', and 'Add & Remove'. The first row shows '1' as the keypress, 'List Manager' as the applet, and a '+' icon as the action. The second row shows an empty box as the keypress, 'Drop applet here' as the applet, and a '+ -' icon as the action. On the right, the 'List Manager' applet configuration is shown. It has a 'List' dropdown menu with 'Schools Mailer' selected, and an 'Action' dropdown menu with 'Add' selected. Below the 'Action' dropdown is a 'Next' section with the text 'After adding or removing the number, continue to the next applet' and a 'Drop applet here' box.

In the above example, as soon as the call starts, Exotel greets - "Press 1 for sales, 2 for service" and if the caller presses 1, his number is added to a list called "Schools Mailer".

You can now go view what is there in the schools mailer (and download if required) from the address book.

8.2.6. IVR Menu

App Builder/Custom apps can be used to create customized IVR prompts for both incoming and automated outbound calls including call campaigns. More information on App builder can be found here: <http://exotel.in/blog/app-builder/>

An IVR (Interactive Voice Response) menu provides the ability to present a "voice" with commands and ask the user to "respond" and hence making the entire thing interactive! IVR menu is useful if:

- Your customers call the same number with different kinds of questions or doubts
- There are different teams handling different parts of a customer life cycle (like billing, order delivery etc.)
- You want to categorize callers into buckets (like existing customers vs. new customers etc.)

Drag/drop the "IVR menu" applet in your call app. It looks like this:

When a call begins, what should we do?
Drag an applet from the right to get started.

Menu Prompt
When the caller reaches this menu they will hear:

Type Text to read like a robot or to get it recorded | Upload WAV or MP3 audio file | Record using a phone | Choose from your library

Menu Options

Keypress	Applet	Add & Remove
1	Drop applet here	+
2	Drop applet here	+ -

Do you want to repeat the menu back?
Repeat the menu back to the caller. Enter zero if you do not want the menu to repeat.
time(s)
After a timeout of...

Configuration options

Voice prompt

The voice prompt to be presented to the user. The usual four methods (Type text & get it recorded, Upload, Record or choose from library) of creating a prompt are available. A typical prompt will be something like this: "Thank you for calling A B & Company. Press 1 for sales or 2 for support".

Menu Options

Now type 1 in the text box below "Keypress" and drag/drop another applet in the "Drop applet here" zone. For example - a Connect applet will then connect the caller to a group. Click on the "+" button on the right to add more keypress options.

Tip: The numbers don't have to be 1, 2, 3 etc. It can even be 121, 421 and 834 or anything you want. Using this, for instance, you can now create extensions for your groups or co-workers.

Menu repetition

New callers may not follow your prompt help carefully and hence it is helpful to repeat the same menu up to 3 times so that the caller is able to decide on the option of his choice. So, we recommend "2" for "Do you want to repeat the menu back?" option. (The system will speak the prompt once anyway)

Do you want to repeat the menu back?

Repeat the menu back to the caller. Enter zero if you do not want the menu to repeat.

time(s)

After a timeout of...

secs. Default = 5 seconds

Timeout for menu repetition

After having said the voice prompt once, the system will wait for 5 seconds before repeating the menu (depending on what you chose above!). 5 seconds is optimal and we recommend that you leave this untouched!

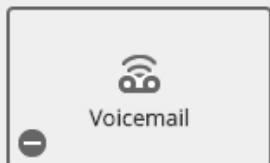
Note: If one of your options under "keypress" is a single digit number (say 3) and another option is 3 digits (say 673), and if the user enters "3", Exotel will wait for another 10 seconds, that is, 5 second time out for each digit as configured above (expecting that the person may enter another two digits) before concluding that the user has nothing more to enter! You may want to reduce the timeout option in this case.

No input from the caller

If, even after repeating the menu 3 times, the caller has not entered anything - We may want to connect him to a front-desk receptionist or ask him to record a voicemail and hang up. From the old world, this is the equivalent of "Wait for operator's assistance". If you do not have an operator, we recommend that you drag/drop voicemail and then send an SMS informing the caller that you have received his voicemail and will call back shortly.

When the caller didn't enter anything after the menu...

Redirect the caller to another applet.



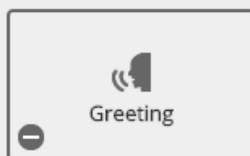
Incorrect input by the caller

In the above example, you asked the caller to enter 1 and 2. What if he entered 7? You could handle it like how you would handle the "No input from caller" option above. Or, you can inform that user that he pressed something wrong and redirect him back to the IVR menu. To do this:

1. Drag/drop a Greeting applet and prompt him with something like "Your option is incorrect. Please try again".
2. Then drag/drop a "Transfer" applet and point it back to the starting of the menu call app.

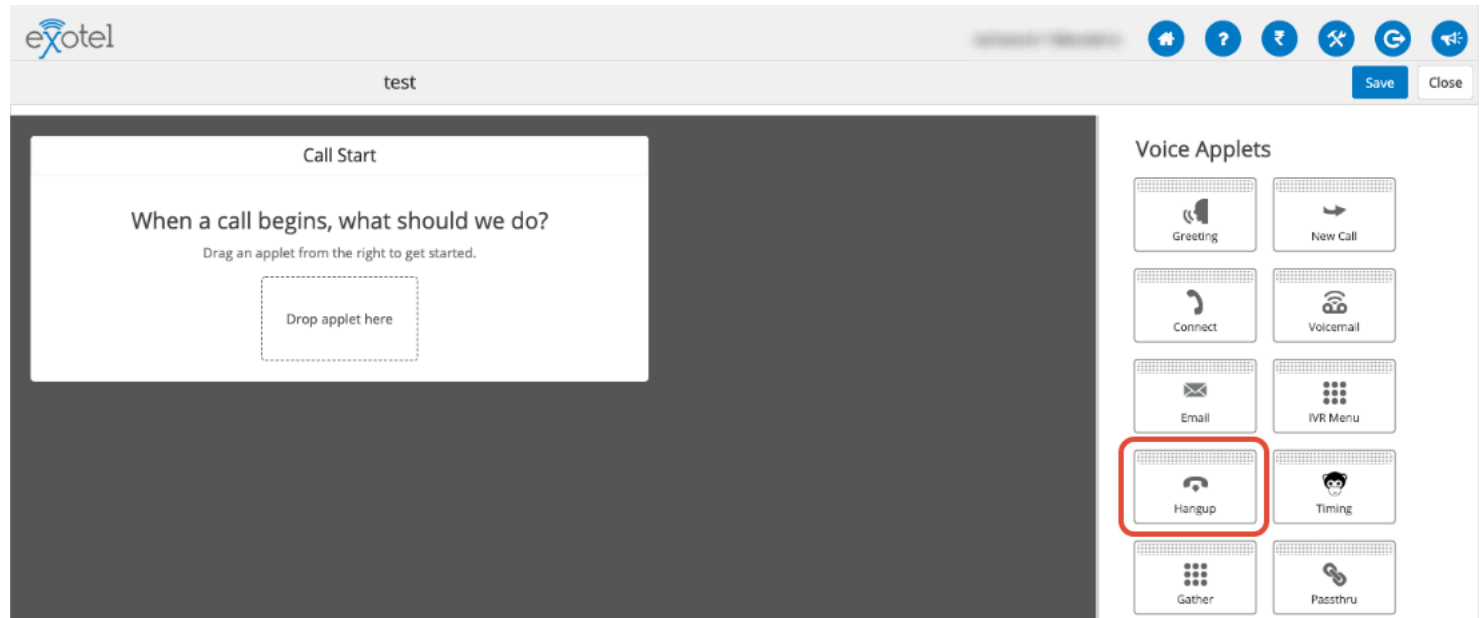
Oops! The caller didn't enter something right.

Redirect the caller to another applet.



8.2.7. Hangup Applet

By using the App Builder, you can build your own custom call flow. You can use the "Hangup" Applet or command at any point you want to terminate a call flow.



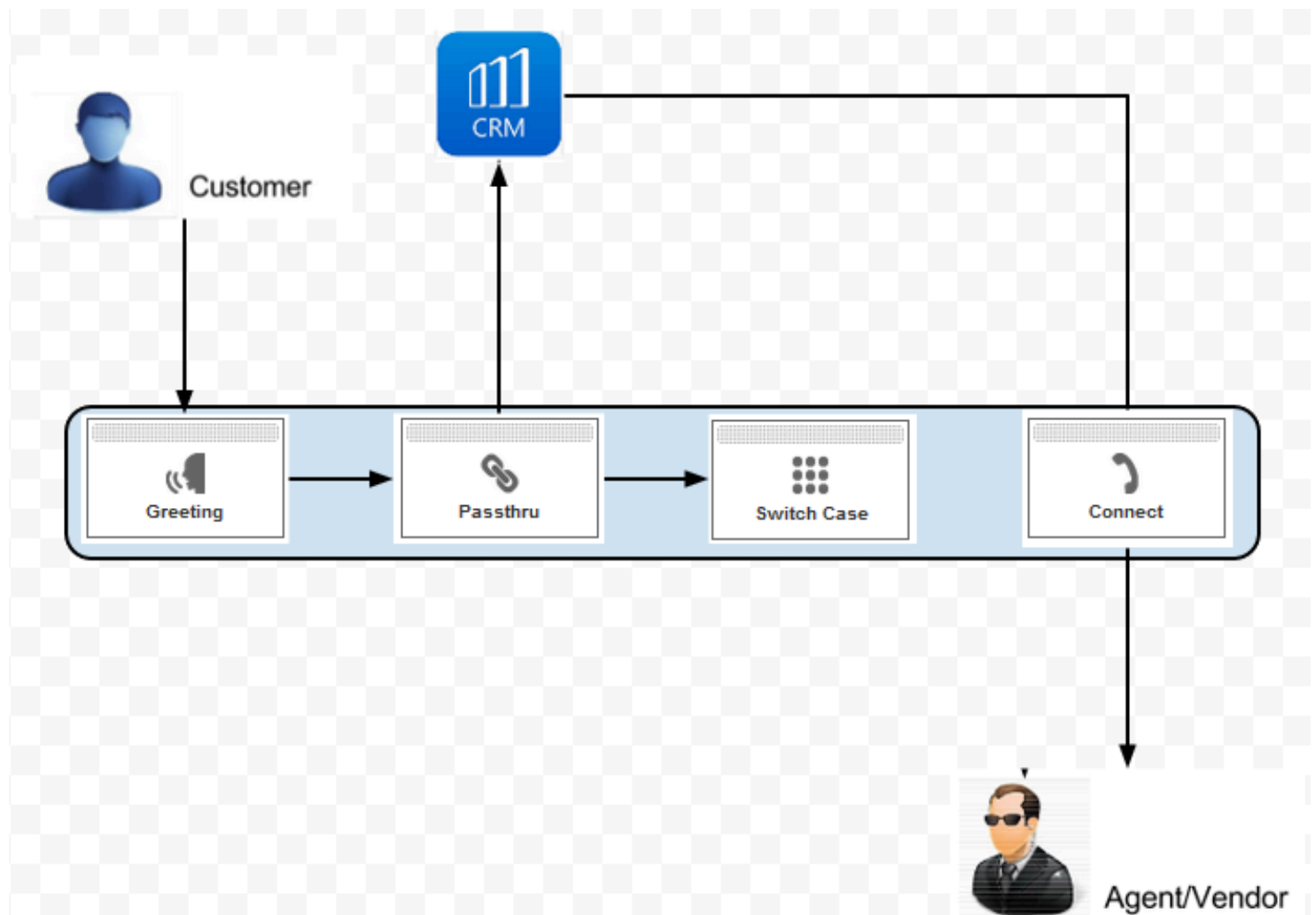
However, you cannot terminate the call or change the call flow of the person on the other end of your phone.

8.2.8. Switchcase Applet

This applet helps customers to streamline their flows based on multiple responses. It helps them to create different workflows based on different responses given.

Ex: For a condition-based routing(Geo routing API)

The call flow would be like this:



The steps followed here are:

1. Customer Calls a central number
2. The pass-through applet passes the call details to the URL configured

Passthru
-

Information Pass Through

When the call reaches this menu, Pass info through to this url:
Use this applet to send info to your CRM or Support software. [Learn more](#)

www.the_new_company.com/exoteldata.php

sample URL

Options

Make Passthru Async	☐
---------------------	--------------------------

In response

Once the URL returns OK ([200 OK](#))...



Switch Case

If the url returns anything else..
Like 404 Not found or 302 found etc?

It makes a GET request to the URL with the call details as URL-encoded HTTP query parameters.

eg: - `www.the_new_company.com/exoteldata.php?CallSid=1321360773 &From=09880847047&To=08088919888&Direction=incoming&DialCallDuration=7&StartTime=2011-11-15+18%3A09%3A41&EndTime=0000-00-00+00%3A00%3A00&CallType=call&DialWhomNumber=09052161119&digits=%2289%22 HTTP/1.1`

Once Passthru sends the data, the customer needs to read the digits parameter along with the Callsid and return a 200 Ok response along with a keyword in the body of the response (The response needs to be in **text/plain** format).

This list of keywords that are returned in the passthru applet will be checked in the switch case applet, where these keywords are pre-defined and are set to do corresponding actions (This could be connecting to a group (Connect applet), playing a greeting (greeting applet) and others).

Please find one such example below.

Passthru

Information Pass Through

When the call reaches this menu, Pass info through to this url:
Use this applet to send info to your CRM or Support software. [Learn more](#)

Options

Make Passthru Async

☐

In response

Once the URL returns OK ([200 OK](#))...

Switch Case

If the url returns anything else..
Like 404 Not found or 302 found etc?

Drop applet here

Switch Case

Switch-Case Options

Input		Applet	Add & Remove
product1	then	Connect	+
product2	then	Connect	+ -

Default

Redirect the caller to another applet.

Drop applet here

Example:

CRM now needs to send a keyword to be read by SWITCH CASE, which would connect the call to a specific team.

The CRM needs to return response like below in text/plain format

```
{"select": "<Name/option in the switchcase>"}
```

```
{"select": "product1"}
```

This option is read by the switch case applet and tries to follow the next part of the call flow which is "connect" to reach the appropriate group.

This can be used for Dynamic routing in case of marketplace scenarios.

8.2.9. Greeting Applet

A greeting is the first message that callers listen to when they call your company. Having a clearly articulated welcome message for your callers is essential for your business. We recommend using the Greeting applet before your call flow, to get the correct call status as well.

Greeting Test Flow

[Save](#)
[Close](#)

Call Start

When a call begins, what should we do?

Drag an applet from the right to get started.


 Greeting

Greeting

Audio Choice

When the caller reaches this prompt, they will hear:

Type Text

to read like a robot
or to get it
recorded

Upload

WAV or MP3 audio
file

Record

using a phone

Choose

from your libra

Next

After the initial prompt, continue to the next applet

Drop applet here

Voice Applets


 Greeting


 Connect


 New Call


 Voicemail


 Email


 IVR Menu


 Hangup


 Timing


 Gather


 Passthru


 Transfer


 Who's Calling?


 Password


 List Manager

[Support](#)

There are multiple ways to play the greeting message using this Greeting applet.

Type Text

- Play a robotic Voice by clicking on the type text and enter the message that needs to read out by the greeting applet. Enter the text and click on the SAVE button for the greeting to be played.

Greet my callers with...

Type Text

to read like a robot
or to get it
recorded

Upload

WAV or MP3 audio
file

Record

using a phone

Choose

from your library

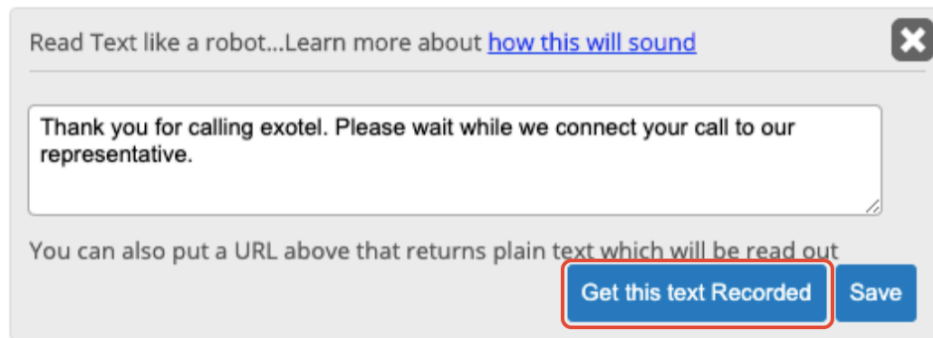
X

You can also raise a voice request to get the text recorded in Indian accent by clicking the “Get this text Recorded”

NOTE: ₹ 600 per recording request with a maximum limit of 200 words. Every time you press "Get this text recorded", it is considered as one request and will cost ₹ 600.

Audio Choice

When the caller reaches this prompt, they will hear:



Read Text like a robot...Learn more about [how this will sound](#)

Thank you for calling exotel. Please wait while we connect your call to our representative.

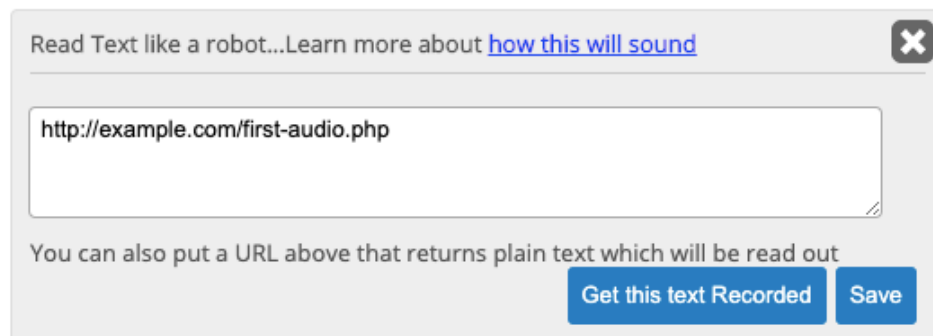
You can also put a URL above that returns plain text which will be read out

[Get this text Recorded](#) [Save](#)

- In Exotel, you have an option to make this greeting dynamic - ie, you can potentially play a different greeting to different callers.

In the Greeting (or Menu) applet, you can specify a URL (instead of a static text) in the "Read text like a robot" option. See below.

When the caller reaches this prompt, they will hear:



Read Text like a robot...Learn more about [how this will sound](#)

<http://example.com/first-audio.php>

You can also put a URL above that returns plain text which will be read out

[Get this text Recorded](#) [Save](#)

When the text box contains a URL, Exotel will make an HTTP GET request to that URL (which is hosted at your server). Your server can now return either a text or a URL (to an audio file). If it returns a text, the text will be converted to audio using our Text-To-Speech (TTS) engine and then played out.

NOTE: The following are the conditions if you are adding a URL to play out the audio using a URL or uploading an audio file.

1. Bit resolution - 8 Bit
2. Sampling rate - 8000Hz
3. Audio channel - Mono
4. Audio File - .wav/.mp3

In case if audio is not being played from the URL check these specifications for the audio file and update the audio file under the URL as per the standard IVR greeting specifications. In case if you face any issue then drop an email to hello@exotel.in or call 8088919888

Upload

- Upload the audio file of .wav or .mp3 file with a file size less than 2MB and of 8Khz Mono format. In case if the file is not getting uploaded then check if the specification of the audio file matches the standard format.

Greeting ⊞

Audio Choice

When the caller reaches this prompt, they will hear:

Type Text

to read like a robot
or to get it
recorded

Upload

WAV or MP3 audio
file

Record

using a phone

Choose

from your library

Record

- Record the audio file using your phone as a microphone. Enter a number (with a preceeding 0), click Call & Record, and record your message.

Greeting ⊞

Audio Choice

When the caller reaches this prompt, they will hear:

Type Text

to read like a robot
or to get it
recorded

Upload

WAV or MP3 audio
file

Record

using a phone

Choose

from your library

Audio Library

- Choose the audio file from your audio library. You will find the voice-over request recording under the Audio Library.

Greeting ⊞

Audio Choice

When the caller reaches this prompt, they will hear:

Type Text

to read like a robot
or to get it
recorded

Upload

WAV or MP3 audio
file

Record

using a phone

Choose

from your library

Greeting



Audio Choice

When the caller reaches this prompt, they will hear:

Choose from your library...

✓ Choose recording...

Upload of NEET Madurai.mp3 (Jun 05 07:39)
Upload of Russia Madurai.mp3 (Jun 04 13:51)
Upload of Clip 1.mp3 (Jun 02 12:39)
Thanks for Calling. Please wait (Sep 05 19:09)
All agents busy, please wait (Apr 24 10:21)
Invalid option (Apr 24 10:21)
Recorded for training purposes (Feb 19 12:51)
All representatives busy (Feb 18 16:01)
Leave a voice message (Feb 18 16:01)
Thank you for staying on hold (Feb 18 16:00)
Closed hours (Feb 18 16:00)

Drop applet here

8.2.10. Timing Applet

As depicted below, click on the “+” symbol to mention the timings for each day. In case of holidays or non-working days, you can let the days be marked as closed.

Timing

Set your open hours.

Use the table below to set the hours which you are open. Time is based on the dashboard's timezone.
Dashboard's time: Fri, 15 May 2020 10:15:39 +0530

Monday	Closed	+
Tuesday	Closed	+
Wednesday	Closed	+
Thursday	Closed	+
Friday	Closed	+
Saturday	Closed	+
Sunday	Closed	+

Open applet.

When someone calls or SMS while open, use the applet below.

Open

Closed applet.

When someone calls or SMS while closed, use the applet below.

Closed

Note: From time should always be lesser than the To time. For example, if you need to set your business hours from 6 AM to 12 AM, do select the timings from 06:00 AM to 11:59 PM.

Once the timing is set, control your call flow based on the timings set. As shown in the image, there are 2 options,

Open applet: The open applet is the one where you can build your call flow for your business hours (This is the time that falls within the business hours set in the timing applet).

Open applet.

When someone calls or SMS while open, use the applet below.

Open

Closed applet: The closed applet can be used to indicate what needs to be done when there is an incoming call pre or post the business hours mentioned in the timing applet. For example, if you want to play a greeting saying you are closed, you can add a greeting applet.

Closed applet.

When someone calls or SMS while closed, use the applet below.

Closed

Please note that in the case of multiple shift timings, multiple timing applets can be used in the closed hours of the preceding timing applet. For example, if there are multiple shift timing based on which the call needs to be routed to different groups, the first shift would be 9 AM to 2 PM and the second shift would be 2 PM to 6 PM. This can be done by adding a timing for 9 AM to 2 PM initially, inside the closed applet of the 9 AM to 2 PM shift, another timing applet can be added to accommodate the shift from 2 PM to 6 PM.

Timing

Set your open hours.

Use the table below to set the hours which you are open. Time is based on the dashboard's timezone.
Dashboard's time: Fri, 15 May 2020 13:49:13 +0530

Monday	09:00 AM to 02:00 PM	—
Tuesday	Closed	+
Wednesday	Closed	+
Thursday	Closed	+
Friday	Closed	+
Saturday	Closed	+
Sunday	Closed	+

Open applet.

When someone calls or SMS while open, use the applet below.

Open

Closed applet.

When someone calls or SMS while closed, use the applet below.


Timing

Timing

Set your open hours.

Use the table below to set the hours which you are open. Time is based on the dashboard's timezone.
Dashboard's time: Fri, 15 May 2020 13:49:13 +0530

Monday	02:00 PM to 06:00 PM	—
Tuesday	Closed	+
Wednesday	Closed	+
Thursday	Closed	+
Friday	Closed	+
Saturday	Closed	+
Sunday	Closed	+

Open applet.

When someone calls or SMS while open, use the applet below.

Open

Closed applet.

When someone calls or SMS while closed, use the applet below.

Closed

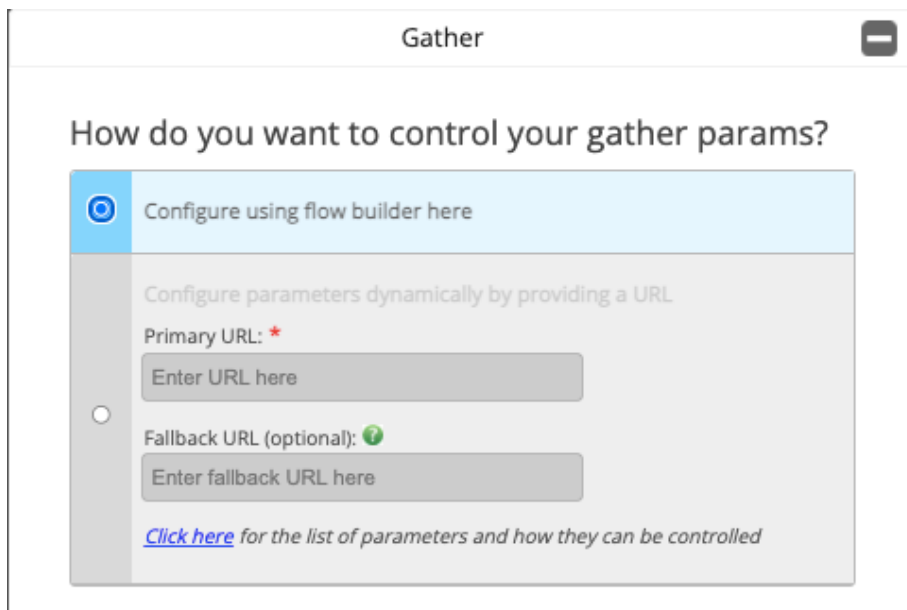
8.2.11. Gather Applet

This applet allows you to take numeric information from the user when they are pressing something on their keypads. The information gathered can be used for mobile number input, order id verification etc. along with the Pass-thru applet to process such information in real-time and proceed with an appropriate set of actions with the user on call.

You can choose to configure the gather applet parameters using the flow builder itself or control it dynamically through a URL. However, you'll need to configure the transitions (next applet) while building the flow irrespective.

Configure using flow builder

1. Select Configure using the flow Builder here



The screenshot shows a configuration window titled "Gather". Inside, the question "How do you want to control your gather params?" is displayed. There are two radio button options. The first option, "Configure using flow builder here", is selected and highlighted with a blue background. The second option, "Configure parameters dynamically by providing a URL", is unselected and has a grey background. Under the second option, there are two input fields: "Primary URL: *" with a red asterisk and "Enter URL here", and "Fallback URL (optional): ⓘ" with a green information icon and "Enter fallback URL here". At the bottom of the second option's section, there is a blue link that says "Click here for the list of parameters and how they can be controlled".

2. Play a prompt to the caller to enter the input
3. Specify Key Input behaviour

Finish Key 

Finish after user enters this key

#

Maximum Number of Digits 

Finish after user enters these many number of input digits

127 digit(s). Default = 127

Specify the input timeout

Wait for the caller to press another digit (First input included) for.. 

5 secs. Default = 5 secs

Do you want to repeat the menu back, if no input is given?

Repeat the menu back to the caller.

0 time(s). Default = 0

Configure parameters dynamically by providing a URL

1. Select Configure parameters dynamically by providing a URL

Gather

How do you want to control your gather params?

☐ Configure using flow builder here

☒ Configure parameters dynamically by providing a URL

Primary URL: *

Fallback URL (optional): 

[Click here](#) for the list of parameters and how they can be controlled

In case you choose to configure the parameters dynamically using your application URL, you can set a 'Primary URL' for handling the requests. You can also set a 'Fallback URL' (optional) which will be contacted in case something goes wrong with your 'Primary URL'.

Request

If an application URL is set for gather applet, Exotel will make a GET request to the URL with the call details as URL-encoded HTTP query parameters.

The following are the parameters of the GET request. Note that only some of this list may be passed to your application - depending on what stage of the flow you have placed the gather applet.

Header:

Exotel-Version	This value will indicate the version of gather applet parameters against which your endpoint's response will be validated.
	Current Version: 1.0

Query Parameters:

Parameter Name	Description
CallSid	Unique identifier of the call
CallFrom	In case of an outgoing call, it'll be set to the number from which the call is made. In case of an incoming call, it'll be set to the number from which the call is received
CallTo	In case of an outgoing call, it'll be set to the number being dialled out. In case of an incoming call, it'll be set to the number where the call landed.
Call status	The status of the call depends on what stage it is at. Possible values: 'queued', 'ringing', 'in-progress', 'completed', 'busy', 'failed', 'no-answer', 'canceled'
Direction	The direction of the call. Possible values: 'incoming' or 'outbound-dial'
Created	Timestamp when the call is created
DialCallDuration	Value in seconds from the time call is triggered to the second leg of the call till it is over (including conversation time). This value can be set to zero depending on the previous applet and if there's no second leg in the call flow.
StartTime	Timestamp when the call is started
EndTime	1970-01-01 05:30:00 // Unix time (also known as POSIX time or epoch time) Note that this would be a constant value and you may instead trigger our Call details API a few minutes after the call has been completed, to get the accurate information
CallType	Scenario Value IVR only, no connect applet call-attempt Call conversation happened completed The client hung up during connect applet client-hangup Connect applet, no agent picked up incomplete Went to voicemail applet voicemail
DialWhom Number	Shows the number of the agent who was dialled to last
flow_id	Flow id associated with the call
From	In case of an incoming call, it is the number of the caller. In the case of an outgoing call, it is the number of the first leg of the call.
To	In case of an incoming call, it is the ExoPhone into which the call came. In the case of an outgoing call, it is the number to which the call was made.
CurrentTime	Current server time (format : yyyy-mm-dd, hh:mm:ss)

*These parameters will be passed if certain conditions are met as described below:

Parameter Name	Description
DialCall Status	This will denote what happened with the second leg of the call if the previous applet was “connected”. Possible values: 'completed', 'busy', 'no-answer', 'failed', 'canceled'
Legs	An array that will denote detailed information about each leg attempt if the previous applet was “connect”. Sample: <pre>Legs[0][CauseCode]=NORMAL_CLEARING Legs[0][Cause]=16 Legs[0][Type]=single Legs[0][OnCallDuration]=21 Legs[0][Number]=07200498123</pre> Meaning: - Legs[i]: i denotes the index of the attempt in the connect applet. If there are multiple numbers attempted, the array's length will be equal to the total attempts. - CauseCode: Cause code of the call as returned by the operators - Code: Numeric representation of the cause code - Type: single or parallel - OnCallDuration: Time spent by the leg on call. This value could be 0 if there was no conversation with the attempted leg. - Number: Phone number of the attempted leg
digits	'digits' will be passed if there was a 'Gather' or 'IVR' applet before this applet and will be equal to the input digits that were entered. NOTE: This parameter comes with a double quote (") before and after the number. You'll have to trim() this parameter for double quotes (") to get the actual digits.
Custom Field	If the call was initiated via API, the value that was passed in CustomField in the API call will be set here.
RecordingUrl	This will be populated if the previous applet was "voicemail". It will contain the URL of the voicemail recording. There could be a delay before the recording can be accessed depending on the length of the recording file.

Response

This is the response Exotel will expect to the GET request from your Gather Application URL. The response will decide what parameters will be set while executing gather during the call flow.

Response Header:

Content-Type	application/json
--------------	------------------

Sample:

```
{
  "gather_prompt": {
    "text": "Hello Kovalan, please provide your order id",
    "max_input_digits": 5,
    "finish_on_key": "#",
    "input_timeout": 6,
    "repeat_menu": 2,
    "repeat_gather_prompt": {
      "text": "It seems that you have not provided any input, please try again."
    }
  }
}
```

Explanation:

Parameter	Type	Behaviour	Description
gather_prompt	string	Mandatory	URL of the audio file or text which will be played out Possible Values: <pre>{ "audio_url": "http://your-endpoint.com/test-audio.mp3" } OR { "text": "Please enter your mobile number" }</pre>
max_input_digits	integer	Optional; default = 255	A maximum number of digits which are expected by the user to be entered, after which the gather should end successfully.
finish_on_key	string	Optional; default = #	Input key after which the gather should end successfully. Allowed: " (empty string), 0-9, *, # Empty would mean there is no finish key. If null or not set, it'll take the default value #.
input_timeout	integer	Optional; default = 5 seconds	Time period in seconds between each key press within which the user has to enter another input key (first input included)
repeat_menu	integer	Optional; default = 0	Number of times menu has to be repeated if there is no input provided by the user
repeat_gather_prompt	string	Optional; default = gather_prompt	URL or text to be played out if the menu is repeated i.e. in case repeat_menu > 0 Possible values: <pre>{ "audio_url": "http://your-endpoint.com/test-audio.mp3" } OR { "text": "Please enter your mobile number" }</pre>

*Above set of parameters can also be controlled through the dashboard if one opts to configure the gather applet using the flow builder instead of the Application URL.

Note:**When the dynamic URL response fails... ?**

Redirect the caller to below applet.

Drop applet here

- When mandatory params are missing, URL is unresponsive (non-2xx) or type validation fails from both Primary and Fallback URL (if set), it will go to URL failure case.
- If optional parameters are not passed in response, it will be set to default.
- If both finish_on_key and max_input_digits are passed, whichever criteria are met first will occur i.e. if finish_on_key is pressed or max_input_digits is reached as per the user's input

Cases, where Fallback URL will be triggered, are:

- Primary URL does not return HTTP 200 OK
- Primary URL doesn't return within the timeout period (5 seconds)
- Primary URL returns invalid response:
 - Content-Type should be application/json
 - Mandatory parameters are present
 - audio_url / text should be http/https and returns 200 HTTP code

8.3. Build Apps

8.3.1. Call Centre basic support

This is one of the most widely used use cases by our customers.

A **Greeting Applet** can be played out to your customers initially and the calls would get connected to the respective departments. You can also use an **IVR Menu** to connect the customer to a particular department if there is more than one in your company. Even a **Timing Applet** can be made use of if your business is open only during specific hours.

8.3.2. Setting Up a Simple IVR

All Exotel accounts come with a basic app called Zero App that can be used to set up a simple IVR greeting.

For example, your greeting can say - Thank you for calling xyz company. Someone will attend your call shortly.

1. Click on App Bazaar in the left panel and then on Available Apps

The screenshot shows the Exotel App Bazaar interface. The left sidebar contains a navigation menu with options like Dashboard, Calls, SMS, Tools, Contacts, and Admin. 'App Bazaar' is selected. The main area displays the 'Available Apps' tab. A table lists available apps, including 'test huddle app'. A red arrow labeled '1' points to 'App Bazaar' in the sidebar, and another red arrow labeled '2' points to the 'Install' button for the 'test huddle app'.

2. Scroll down to the Zero app and click on Try for Free

The screenshot shows a grid of apps available in the Exotel App Bazaar. The 'Zero' app is highlighted with a red box and a red arrow pointing to the 'Try for Free' button. Other apps visible include Freshdesk CTI, Zoho CRM CTI, Zoho Desk CTI, Syrow, Shout Out, Miss Call, and Missed Call Plus.

3. Setup the call flow

1. Choose a name for the call flow.

2. Set up your IVR greeting by uploading an audio file or recording your own greeting via a mobile phone. You can also request a professional recording by a voice-over artist via Exotel.
3. choose a group to send an Email to.
4. Choose a group to send the voice if nobody answer's the call and then click on Install.

LIVE

Dashboard Beta

CALLS

Inbox

SMS

Outbox

TOOLS

Campaigns

Campaigns New

CONTACTS

Address book

Co-workers and Groups

ADMIN

App Bazaar

ExoPhones

SMS Configurations

Access Control

Co-worker Activity Log

Analytics

Zero

Choose a name for this App...

Test Exotel

Greet my callers with...

Read Text Welcome to Exotel...!!

edit

After greeting, connect the caller to...

Rachana

After connecting caller, pick an agent...

☒ evenly from the list
 ☐ in the order they appear in the list

Then send an email to...

Do not choose any user/group to not send an email

Rachana

If nobody answered the call ask the caller to leave a voicemail. Then send an email to...

Do not choose any user/group to not send an email

Rachana

'Zero' is an app for your first ExoPhone. Zero is by far the simplest and most useful Exotel app.

It helps you handle multiple calls on your ExoPhone and routes the calls to a user or a group of users in your team.

Greet

Greet your caller

Connect

Connect the call to a user or group

Call Queuing

In case one or more of your agents are busy on a Exotel call, the caller will be queued

Voicemail

In case the all your agents are not answering the call ask the caller to leave a voicemail

Email

Send you an email after the call

Install

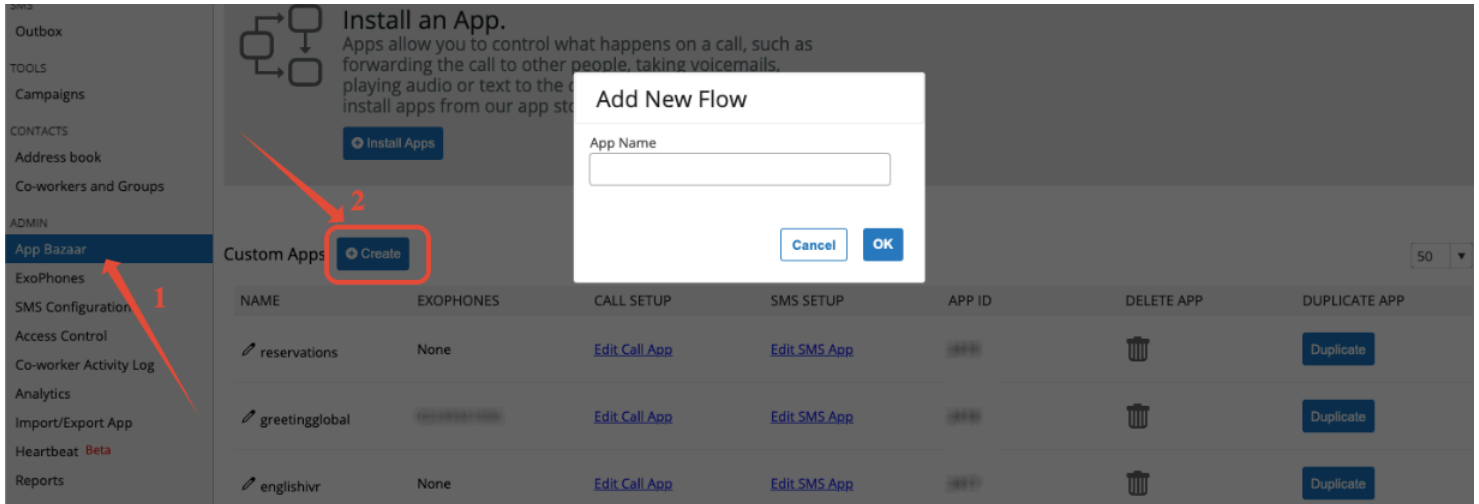
4. Now, you can either buy a new Exophone for this flow or assign this flow to an existing Exophone

You can click here which will redirect to the article on how to purchase an ExoPhone number.

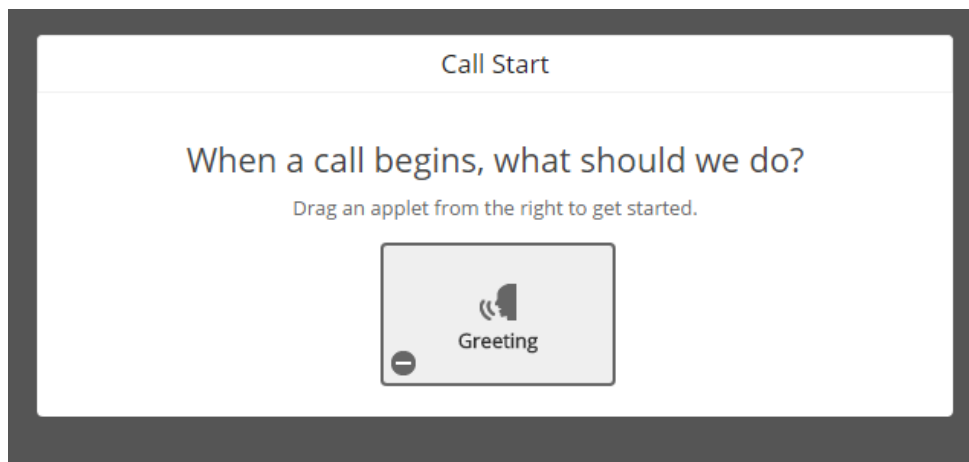
8.3.3. Holiday App

Playing a greeting to your customers who are trying to reach you on non-working days is a common requirement that we at Exotel are asked for. In this article, we'll help you create a 'Holiday App', to ensure these instances are handled better.

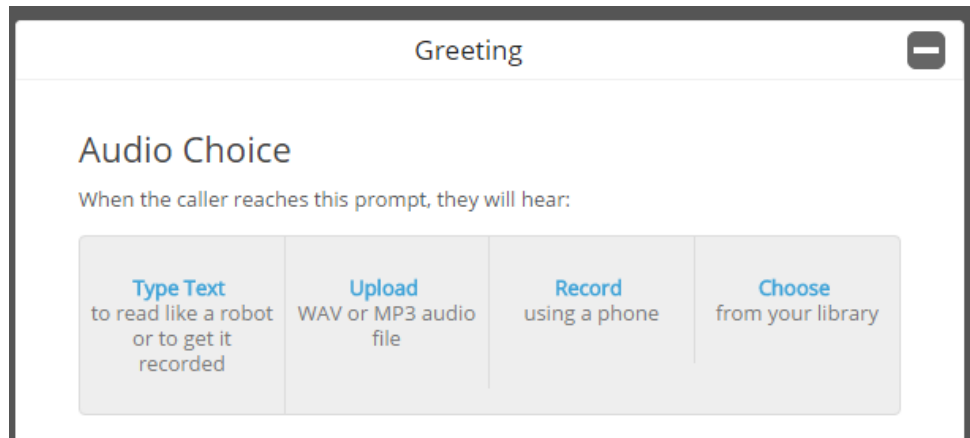
1. Open up the App Bazaar in your Exotel dashboard, and click on the 'Create' option like so:
2. Give any name to the flow.



3. In the Flow Editor, drag and drop the Greeting applet in the Call Start section:



4. You can either type in the content which you want your customer to listen to, which would be a robotic voice or you can upload an MP3 greeting or choose an already uploaded recording from your Audio Library.

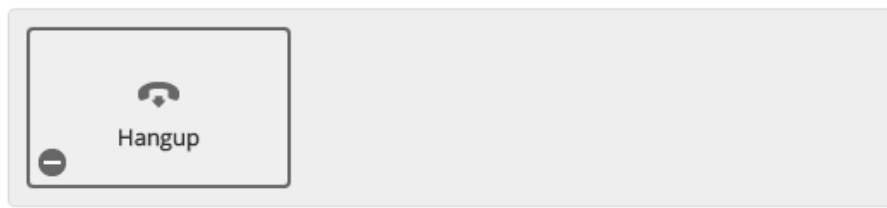


To raise a voice-over request with a professional voice-over artist, follow the instructions here.

5. Finally, add a Hangup applet after the Greeting to hang up the call from your customer.

Next

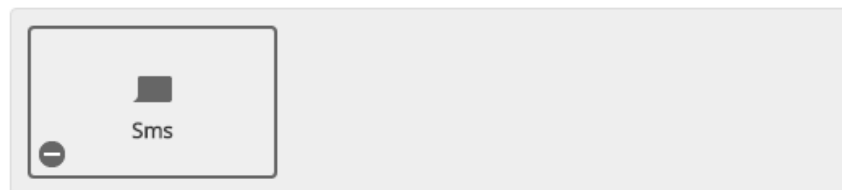
After the initial prompt, continue to the next applet



Alternatively, instead of the Hangup applet, you can use the SMS applet and greet your customer via an SMS. To do that, use the SMS applet instead of the Hangup applet in step 5 above:

Next

After the initial prompt, continue to the next applet



And we're done! Connect this flow to your Exophone or transfer to it from the [Timing Applet](#) to have it execute when your customers call in.

8.3.4. Automated Telephonic Survey App

Automated Telephonic Survey App (ATSA) offers you the ability to take your surveys from the phone directly to the cloud. Instead of conducting offline surveys, you can do the same over an IVR thereby saving you time, money, and operation costs.



ATSA by UMS Tech Labs

Rs. 1000 per month [Try for Free](#)

ATSA allows you to conduct IVR surveys with ease Instead of conducting time consuming offline ...

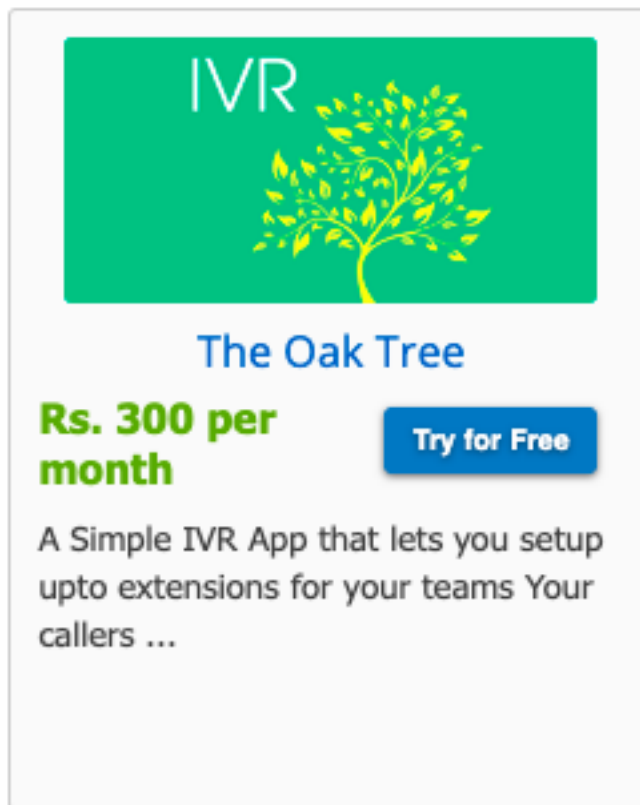
You can set up an online survey within minutes and get going. The app will receive calls on your behalf to record responses from the participants directly to the cloud. Even though the responses are stored on a cloud-based system, the participants of the survey need not be connected to the internet. The survey participants only have to pick up their phones and dial a number while the system records their responses over the phone.

Why you should use it:

1. **Save time:** Feedback from thousands of participants can be handled by the app in minutes as opposed to days in a conventional survey
2. **Get unbiased responses:** There is no physical agent calling the survey participants who can introduce a bias into the customer's mind
3. **Reduce personnel costs:** Since all the calling is done by an IVR system, the costs involved are greatly reduced even for large-scale surveys
4. **Global accessibility:** Since the surveys are being conducted over the phone, not with a pen and paper, participants from all over the world can participate regardless of their location
5. **Minimal learning curve:** Since all data is managed on your Google Apps using your google account, you probably know how to use the system already

8.3.5. The Oak Tree

The Oak Tree is a simple IVR app that lets you set up up to 4 extensions for your teams. Your callers are greeted with a welcome message and routed to the right team based on their IVR option. This is how it looks in the App Bazaar:



This app helps you set up a single number for your entire company while providing a simple one-step menu for your callers. There are four options to decide on in this app.

Choose a name for this app.

Choose a name for this App...

Eg: First IVR App

Greeting...

Type Text

to read like a robot
or to get it
recorded

Upload

WAV or MP3 audio
file

Record

using a phone

Choose

from your library

Press to Call

Disabled (click to change)



Press to Call

Disabled (click to change)



Press to Call

Disabled (click to change)



Press to Call

Disabled (click to change)



After connecting caller, pick an agent...



evenly from the list



in the order they appear in the list

After the call, send this SMS to the caller

Eg: Thanks for calling. You just spoke to %pickedupby%

Greet

Type or get an audio recorded that informs the user of the options available in the menu. A typical prompt would be something like this: "Thank you for calling so and so company. Press 1 for this or 2 for that...". This is a mandatory option as without telling the menu options - your caller will not know which option to choose.

Route & Mail

As shown in the box above, every option has two configuration options possible. The group to send the call to and an email address to send an email with the details of the call to. By selecting a group, you will enable that IVR option. Also, you can change the number to be pressed to whatever you want. It doesn't have to be 1 for this, 2 for this, etc. You can also have an option for 122 and 498 too! Leave the mail option empty if you would like not to receive an email.

Hangup

In case all your agents are busy, the caller is informed "All agents are busy. Please call again later. Thank you." and the call is hung up.

Additional Validations

You will need to fill at least 2 "Route & Mail" combinations. Greeting is mandatory.

Default Values

Tring Tring time on one agent before ringing the next available agent: 15 seconds

Sticky Agent is: On

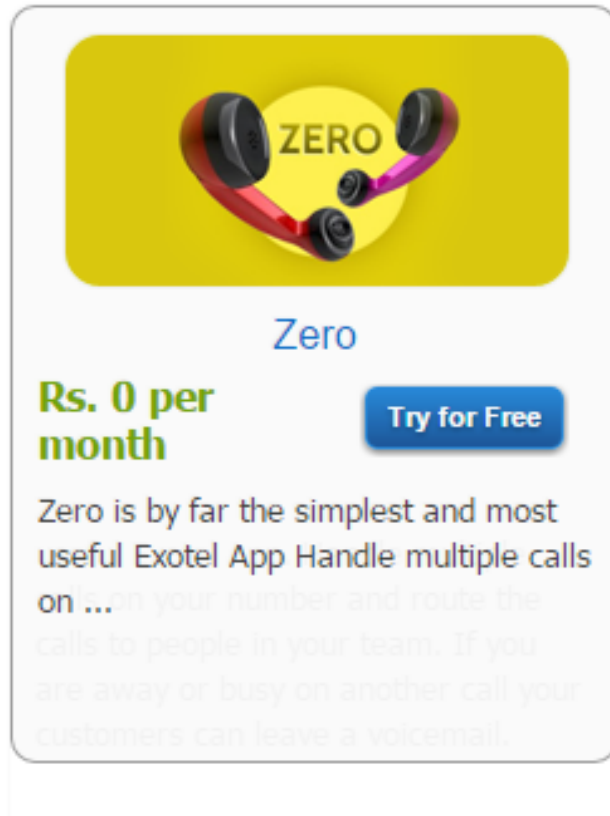
Calls are distributed to everyone in the group (randomly & not round-robin)

You will receive an email from noreply@exotel.in (add this to your address book)

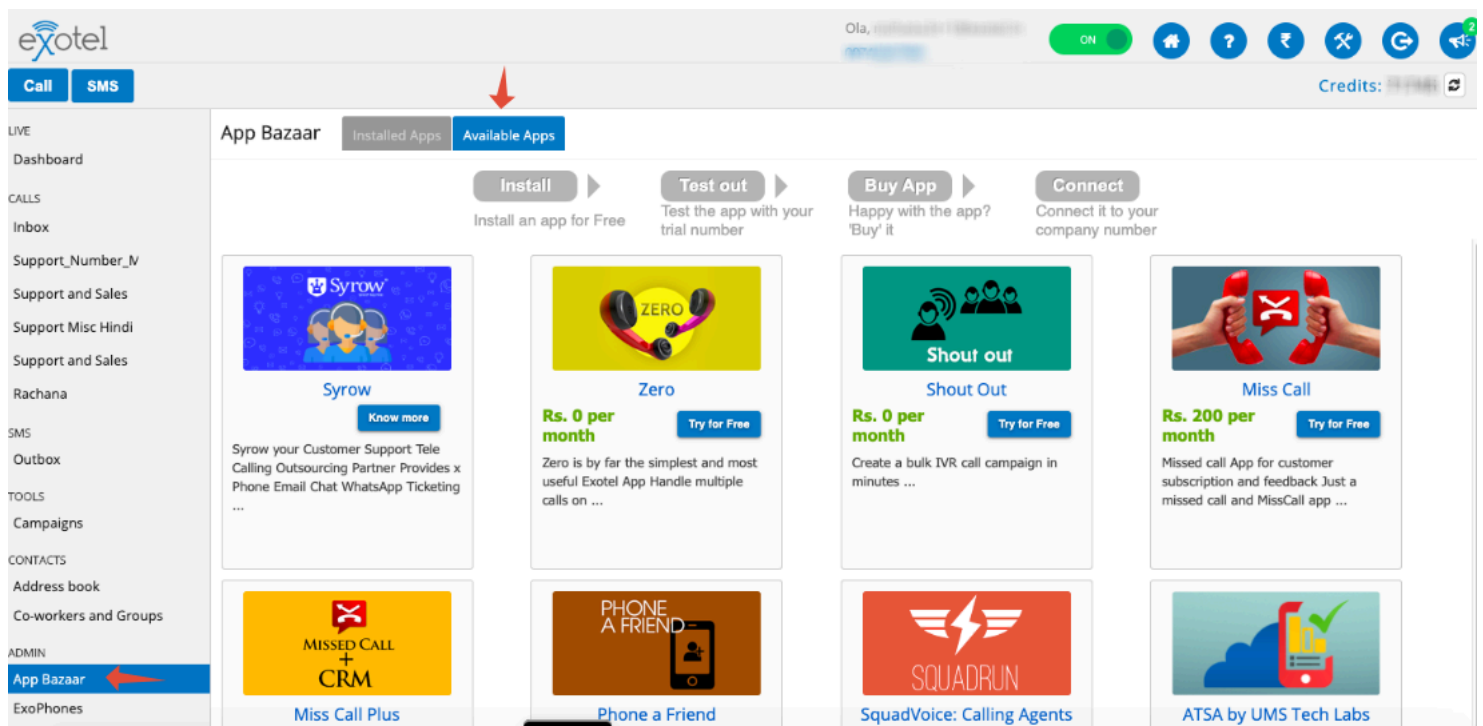
If all agents are busy, Caller hears "All agents are busy. Please call again later. Thank you"

8.3.6. Zero App

Zero is the simplest and most basic Exotel app. It helps you handle multiple calls on your number and routes the calls to a user or a group of users in your team.



You can find this app under available apps in App Bazaar.



Using Zero:

Zero

Choose a name for this App...

Eg: Connect to Outlet1

Greet my callers with...

Type Text
to read like a robot
or to get it
recorded

Upload
WAV or MP3 audio
file

Record
using a phone

Choose
from your library

After greeting, connect the caller to...

Select a User or Group

After connecting caller, pick an agent...

☒ evenly from the list
☐ in the order they appear in the list

Then send an email to...

Do not choose any user/group to not send an email

Select a User or Group

If nobody answered the call ask the caller to leave a voicemail. Then send an email to...

Do not choose any user/group to not send an email

Select a User or Group

'Zero' is an app for your first ExoPhone. Zero is by far the simplest and most useful Exotel app.

It helps you handle multiple calls on your ExoPhone and routes the calls to a user or a group of users in your team.

Greet

Greet your caller

Connect

Connect the call to a user or group

Call Queuing

In case one or more of your agents are busy on a Exotel call, the caller will be queued

Voicemail

In case the all your agents are not answering the call ask the caller to leave a voicemail

Email

Send you an email after the call

Install

- You can greet your caller (leave this blank if you don't want a greeting).
- Then, connect the call to a group (calls will be randomly distributed to everyone in the group. In the short term, a person might receive two calls back to back but in the long term, random is round-robin/uniform).
- If no one in the group answers the call (that is, after ringing all numbers in the group) - the call then goes to voicemail. Leave this option empty to skip the voicemail step.
- After the call is over, send an email to yourself (or to your group). Leave this empty if you don't want the mail.

Once the app is installed, the app shall be available under the 'Installed Apps' in app bazaar

App Bazaar

Installed Apps

Available Apps

Install

Install an app for Free

Test out

Test the app with your
trial number

Buy App

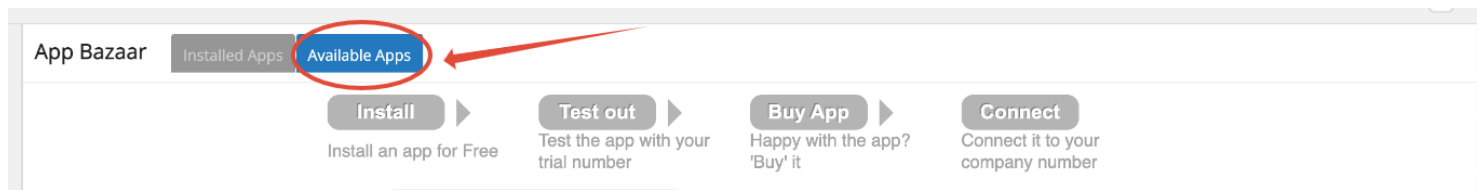
Happy with the app?
'Buy' it

Connect

Connect it to your
company number

	NAME	EXOPHONES	CALL SETUP	SMS SETUP	DETAILS	UNINSTALL APP
	Testing Zero	0224-936-0001 Pin: 9007-4472-85	Edit Call App	Edit SMS App	Zero Rs. 0 per month	Buy 

8.3.7. Phone a friend



So, who is this for? If you...

* Need a **"Key account manager"*** Need someone to write scripts (for say, downloading reports, writing Passthru URLs, Hosting something somewhere, etc.)* Need someone to explain and implement Exotel APIs for your internal use* Want help in putting the Click to Call widget on your website* Some new features that can be implemented using our APIs

* Need to **build Apps** running seamlessly with Exotel, on top of Exotel Platform

With this app, you get paid support along with consultation on solutions & integrations. Please note, development work may be chargeable extra (depending on the project).

Phone a friend is in beta, so please allow for small hiccups during the process. The following are the terms with which Exotel offers phone a friend. Terms are not exhaustive & may change in the future:

On Installation of the app, a small one-time fee** (Refer to App Bazaar for the latest fee) will be deducted

Phone a Friend

Whether you are looking to resolve a product issue, searching for technical expertise or wanting to develop product solutions, **Phone a Friend** app is the right choice for you.

Key account manager

Get the personal phone number & email of an Exotel expert from our partners UMS tech labs.

API Integrations at the speed of light!

At an extra charge, integrate Exotel into your own ERP, CRM or Support software easily and quickly by outsourcing development to this Exotel partner.

Tech consultancy

Your account manager is updated on all the latest features of Exotel so that you don't have to be! He is specially trained to provide tech consultancy to solve your problems using Exotel.

Ready to use app integrations

UMS Tech Labs is our authorized partner and does highly specialized app development over Exotel and Google Apps Platform. [Here are some testimonials](#) for some of our customers.

Do check out their products below, we're sure you'll find a bunch of them useful for your business. Please note that there is an additional charge for intergrating each of the below products into Exotel. The charges will be mentioned to you by our partners after due discussions with you.

Personalized SMS Scheduler:

Send SMS to a list addressing each person with their names just from a Google Spreadsheet either in real time or using our scheduler

Missed2Call:

Call back your clients who place a free missed Call for any query and register them all to your client-list in an easy to use Google Spreadsheet!

Missed Call to IVR:

Get in touch with your customers by just asking them to give you a free missed call followed by a call back from IVR

Automated Telephonic Survey App:

Conduct a telephonic survey by simply putting the questions and getting the response on a Google Spreadsheet

Lead Aggregation System:

Aggregate all your leads from multiple sources (email, web, (missed) calls, SMS) to a single Google Spreadsheet, deduplicate them and take followups with ease; everything in real time!



Support



Phone a Friend

Rs. 500 only [Know more](#)

Do you need the help of an Exotel support specialist? Get a personal account manager to help you with exotel configurations, integration and business consultancy

On Installation of the app, a small one-time fee** (Refer to App Bazaar for the latest fee) will be deducted

Missed2Call:

Call back your clients who place a free missed Call for any query and register them all to your client-list in an easy to use Google Spreadsheet!

Missed Call to IVR:

Get in touch with your customers by just asking them to give you a free missed call followed by a call back from IVR

Missed Call to Voice SMS:

Greet and empathize with your customers when they give you a free missed call through your voice recordings

IVR Cash Collection System:

Authenticate and acknowledge your customers with the representatives at their home for cash collection and maintain the details on real-time basis on Google Spreadsheet, while your runner is on the field

Phone Mini-CRM:

Agents can schedule follow-up calls, send emails to customers, mark lead as Hot/ Cold just after they speak to a customer, right from a normal phone even without internet

Lead Aggregation System:

Aggregate all your leads from multiple sources (email, web, (missed) calls, SMS) to a single Google Spreadsheet, deduplicate them and take followups with ease; everything in real time!

Virtual EPABX System/ Unlimited Extensions:

Create your own Telephone Exchange with unlimited extensions and even a layman can change them easily on a Google Spreadsheet, all extensions can be even randomized each day if the need be

Progressive Dialler App:

No need to manually dial each number, simply populate the list of numbers and place calls one after another, without hassles of listening to engage tones

Purchase "Phone a friend" now!

NOTE: After installing this app, please check your email for further details.

[Get Phone a Friend](#)



- On installation, You will be paired with one of our partners. Partners maintain the same service level quality & trust with you. They may also have their own Privacy policies on their website.
- On project approval, the partner will send you a Proforma with costing for the project.
- You then top up your Exotel account using one of our usual payment methods.
- On receipt of payment, Partner begins work & delivers within the agreed time. They also keep you updated on the progress.
- An additional line item called "Phone a friend" will appear in the upcoming invoice for this amount.
- On delivery & completion, You uninstall the "Phone a friend" app in your account. On Uninstall - Payment will be released to our partner company.
- If the partner company did not deliver on their promises, and if no mutual consensus can be arrived upon, you apply for a refund which will be processed within 2 weeks.

8.3.8. Marketing

Missed Call Marketing Campaign:

This call flow lets you save your customers' numbers for whatever purpose you desire. You can use the [List Manager Applet](#) or a [Passthru Applet](#) with an endpoint to store the numbers.

Feedback calls

In this use case, the customer gives a call and enters a DTMF code to rate the service. This call flow can be constructed using the [Gather Applet](#) and [Passthru Applet](#)

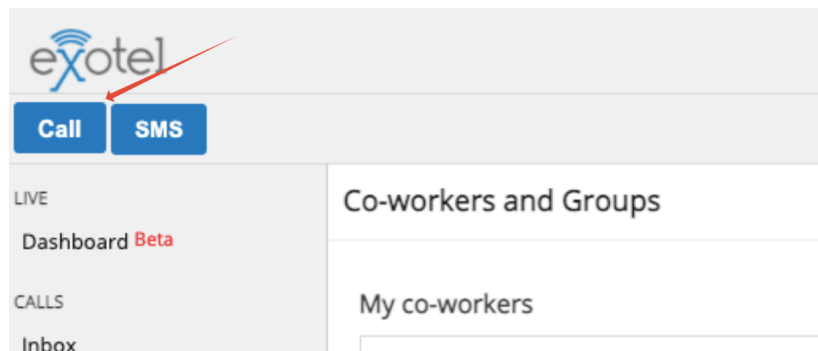
8.4. Test a Call Flow

Prerequisite: **Manage Call Flows** (Call App).

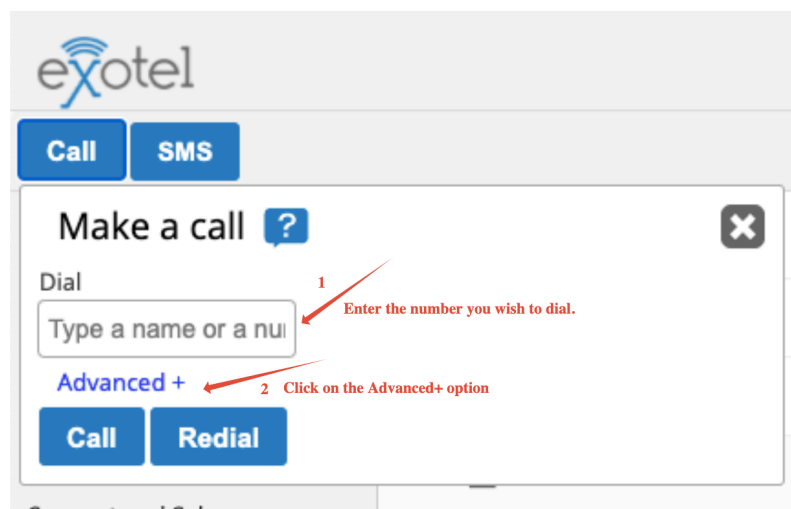
Cash on Delivery Verification, Order Confirmation, Automated Surveys, and Feedback are a few examples of the use-cases for which connect to an App flow can be used.

Connecting to a call flow is just like making an outbound call from the dashboard. The only difference here is that the dialed number will receive the call first and then the call flow will be executed. The following steps will show how to connect a call to a flow.

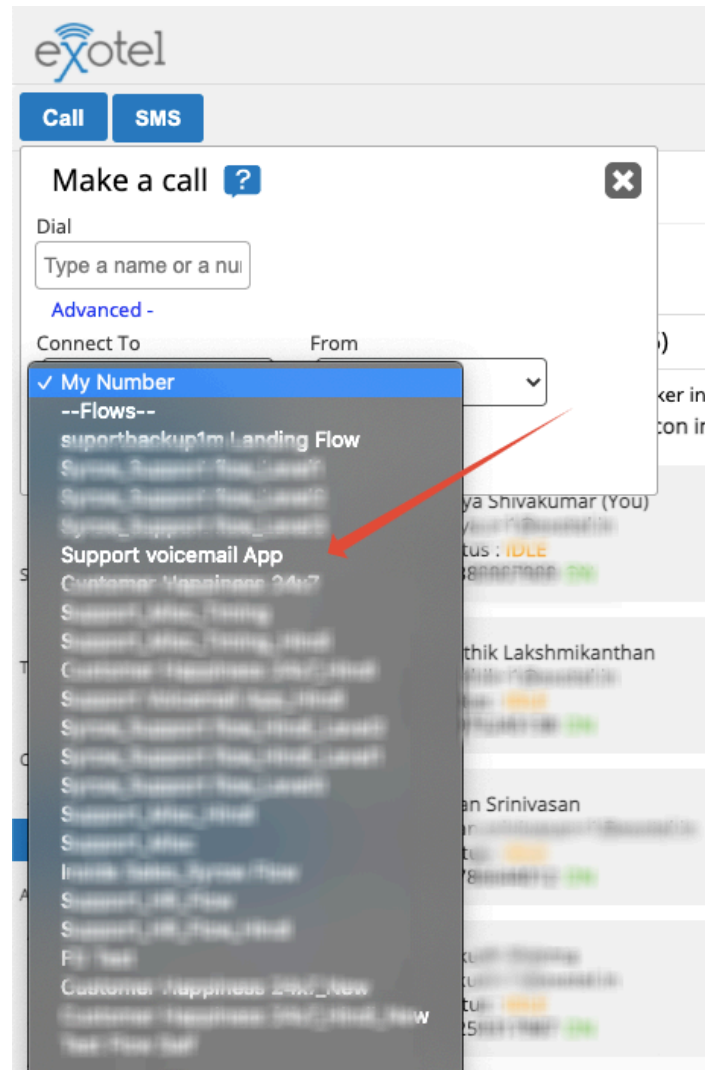
1. Login into your Exotel account
2. Click on the 'Call' button on the top left of the page



3. Enter the number you wish to dial



4. Click on 'Advanced +' and choose your required flow in the 'Connect To' dropdown



5. Click 'Call' for the call flow to be executed.

8.5. Assign Exophone To A Call Flow

To start off, you need to 'Buy' an App from the 'App Bazaar' for you to be able to use it on your Exotel number or [Create a Flow](#)

Once you have bought an app

1. Go to the ExoPhones page

The screenshot shows the Exotel dashboard. On the left, the sidebar menu has 'ExoPhones' highlighted. The main content area is titled 'ExoPhone' and contains a table with the following data:

EXOPHONE	TYPE	INSTALLED APP
095-138-86363 Pin: 1234567890	Not set	Call-TEST
095-138-86363	Landline	English_IVR

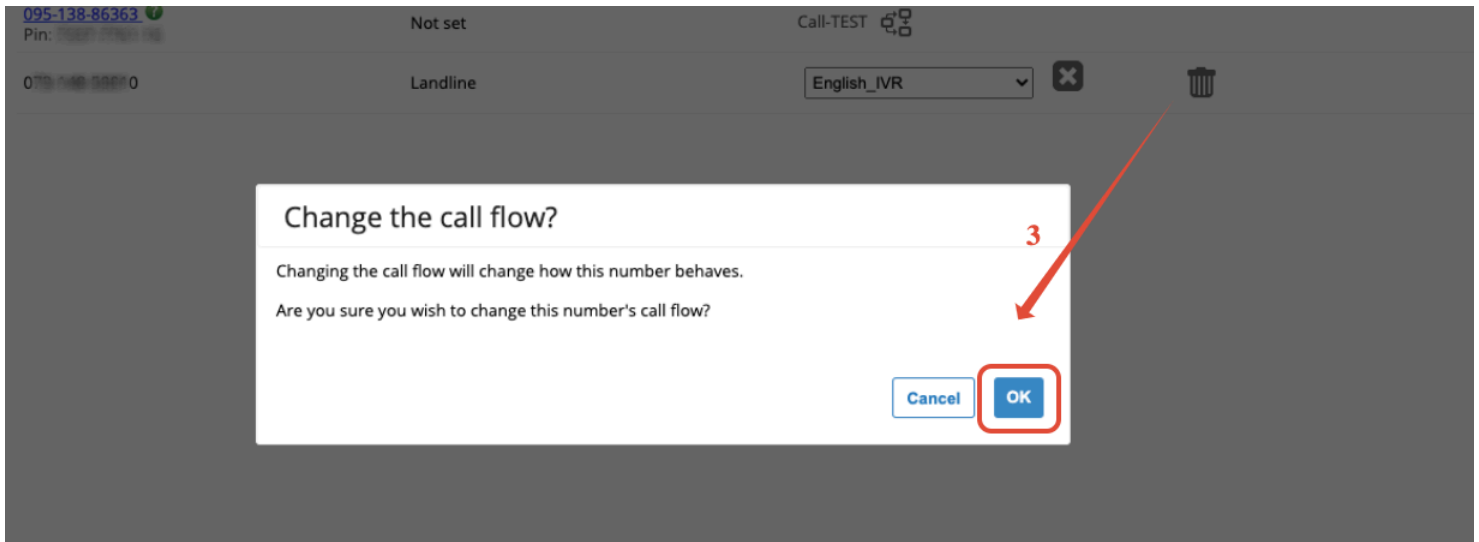
Red arrows indicate the steps: Arrow 1 points to 'ExoPhones' in the sidebar, and Arrow 2 points to the 'Connect a Flow' icon in the 'INSTALLED APP' column.

2. Click on the 'Connect a Flow' icon and choose your App from the dropdown

The screenshot shows the dropdown menu for selecting a call flow. The menu lists various call flows, including 'English_IVR', which is selected. A red arrow points from the 'Connect a Flow' icon in the previous screenshot to this dropdown menu.

Choose any one of the call flow from the dorpdown.

3. Once you click on 'Ok', the call flow will be attached to the ExoPhone number



Your app has now been connected to your ExoPhone! Call your ExoPhone and see your app in action

8.6. Change Exophone For A Call Flow

Below are the steps on How you can link an Exophone to a Call flow.

1. Go to the Exotel dashboard and click on the ExoPhones link in the left panel of the Admin Section.

Exotel dashboard interface showing the ExoPhone management section. The left sidebar contains navigation links: CALLS, Inbox, Support and Sales, Prathik only, Support_Number_N, SMS, Outbox, TOOLS, Campaigns, CONTACTS, Address book, Co-workers and Groups, ADMIN, App Bazaar, **ExoPhones**, SMS Configurations, Analytics, and Access Control. The main content area displays a table of ExoPhones with columns: EXOPHONE, TYPE, and INSTALLED APP. The table lists various landline numbers and their associated installed apps. A red arrow points to the 'ExoPhones' link in the sidebar.

EXOPHONE	TYPE	INSTALLED APP
095-138-86363	Not set	Rahul_oak
+60-327-712799	Landline	exotel only ISO
+61-280-730559	Landline	Exotel Australia New Flow
+61-280-1730594	Landline	exotel only ISO
+62-215-0984555	Landline	exotel only ISO
+62-215-0984960	Landline	exotel only ISO
+65-695-15460	Landline	exotel only ISO
+66-249-15095	Landline	exotel only ISO
011-300-18003	Landline	Varun Unify - 1007
011-300-18020	Landline	test Landline
011-300-18029	Landline	Induction Reminder
011-300-18118	Landline	site
011-300-18149	Landline	Exotel Landing Flow

2. You will see the list of ExoPhones you have in your account. Click on the app logo next to the Installed App on the rightmost column.

Exotel dashboard interface showing the ExoPhone management section. The left sidebar contains navigation links: CALLS, Inbox, Support and Sales, Prathik only, Support_Number_N, SMS, Outbox, TOOLS, Campaigns, CONTACTS, Address book, Co-workers and Groups, ADMIN, App Bazaar, **ExoPhones**, SMS Configurations, Analytics, and Access Control. The main content area displays a table of ExoPhones with columns: EXOPHONE, TYPE, and INSTALLED APP. The table lists various landline numbers and their associated installed apps. A red arrow points to the app logo next to 'Rahul_oak' in the first row.

EXOPHONE	TYPE	INSTALLED APP
095-138-86363	Not set	Rahul_oak
+60-327-712799	Landline	exotel only ISO
+61-280-730559	Landline	Exotel Australia New Flow
+61-280-1730594	Landline	exotel only ISO
+62-215-0984555	Landline	exotel only ISO
+62-215-0984960	Landline	exotel only ISO
+65-695-15460	Landline	exotel only ISO
+66-249-15095	Landline	exotel only ISO
011-300-18003	Landline	Varun Unify - 1007
011-300-18020	Landline	test Landline
011-300-18029	Landline	Induction Reminder
011-300-18118	Landline	site
011-300-18149	Landline	Exotel Landing Flow

3. This will give you a drop-down with a list of all the apps you have in your account.

The screenshot shows the 'ExoPhone' management page. On the left is a sidebar with navigation options: CALLS, Inbox, Support and Sales, Prathik only, Support_Number_M, SMS, Outbox, TOOLS, Campaigns, CONTACTS, Address book, Co-workers and Groups, ADMIN, App Bazaar, ExoPhones (highlighted), SMS Configurations, Analytics, and Access Control. The main area displays a table of ExoPhones with columns: EXOPHONE, TYPE, and INSTALLED APP. The first row shows a number with a green status icon and 'Not set' type. Subsequent rows show various landline numbers with 'Single only ISD' as the installed app. A search bar and buttons for 'Assign ExoPhones to Flow' and 'New ExoPhone' are at the top right. A red arrow points to a dropdown menu in the 'INSTALLED APP' column of the first row.

EXOPHONE	TYPE	INSTALLED APP
095-138-86362	Not set	Rahul_oak
+91-987-9412-04		
+91-927-712799	Landline	Single only ISD
+91-280-730559	Landline	Single Australia New Flow
+91-283-173594	Landline	Single only ISD
+92-215-0984555	Landline	Single only ISD
+92-215-0984560	Landline	Single only ISD
+92-495-15462	Landline	Single only ISD
+92-249-15099	Landline	Single only ISD
011-300-18022	Landline	Warun Unlgy - 7027
011-300-18020	Landline	New Landin
011-300-18029	Landline	Induction Reminder
011-300-18118	Landline	SH
011-300-18149	Landline	Exotel Landing Flow

4. Select the call flow you want the Exophone to be assigned. Before changing the flow, the system will ask you for confirmation.

This screenshot shows the same ExoPhone management page, but with a confirmation dialog box overlaid. The dialog box has the title 'Change the call flow?' and contains the text: 'Changing the call flow will change how this number behaves. Are you sure you wish to change this number's call flow?'. At the bottom of the dialog are 'Cancel' and 'OK' buttons. In the background, the 'INSTALLED APP' for the first ExoPhone has been changed to 'testing-conference-nikhil'.

5. Click "OK" and the call flow will change.

You can also confirm the change by placing a call to the Exophone to observe if the calls are being routed to the newly assigned flow.

Note: You can assign multiple Exophones to a Single flow.

8.7. Origin Based Routing (or) Geo Based Routing

Does Exotel have "origin based routing" feature to route call according to origination point?

Yes, and the Origin based routing works like this:

If a person calls from Tamil Nadu, send the call to my agents in Chennai (or a group) who can speak Tamil. If it is from Maharashtra, send it to Mumbai (or people who can speak Marathi).

Point to consider:

It is now impossible to pinpoint an origin region that is smaller than a telecom circle. For instance, determining whether a caller is from Pune or Nagpur cannot be done using our APIs. Only that they are both from Maharashtra is all we know.

Origin-based routing can be implemented using our APIs even if it is not a pre-built routing policy. Additionally, "App builder" is required for this solution.

- Add the names & numbers of people as users in your Exotel account.
- Introduce a Connect applet in your call flow app, and point it to a URL on your server like this. Read Passthru applet specs to understand what information gets passed on to your server and how.

Call Start

a call begins, what should we do?

Drag an applet from the right to get started.



Connect

Dial Whom

☐
Dial a user or group

☐
Dial phone number(s) (or phone number(s) returned by this URL)

Select a Group

http://mycom.com/getDialToNumber.php

Like 08088919888
or a comma separated list like 08088919888,08049114900
or a URL like http://company.com/exotel/getDialToNumber.php

Record this call?

☐

- Once the call arrives on your server, Use the Phone number metadata API to identify the circle information.
- Based on the circle, return back a comma-separated list of numbers to dial. To achieve this, You will have to maintain a list of numbers, and the circle group they belong to in a database on your side.
- Exotel does not maintain the state of these numbers, i.e. if another call comes and if your script decides to send the call to the same set of numbers, Exotel will dial them, and if the destination party has call waiting enabled, the caller will hear "The person you are trying to reach is on another call" etc., So user & user's state management is left to you to handle.
- If you do not have people to write this code, Consider Phone a friend.

8.8. Unsubscribe an App

You can unsubscribe from the App Builder at any time you wish to. However, when you unsubscribe, none of the custom flows will be useable.

Click on Installed Apps

App Bazaar

Installed Apps Available Apps

Install

Install an app for Free

Test out

Test the app with your trial number

Buy App

Happy with the app? 'Buy' it

Connect

Connect it to your company number

	NAME	EXOPHONES	CALL SETUP	SMS SETUP	DETAILS	UNINSTALL APP
	Call-TEST	0951-388-6363 	Edit Call App	Edit SMS App	Call Transfer Rs. 499/- per month  Purchased	
	ytdjv	None	Edit Call App	Edit SMS App	Miss Call Rs. 200 per month  Purchased	

Step 1

You cannot unsubscribe if you have any ExoPhones associated with the custom flows you have created. So, you either delete those ExoPhones or assign them to different apps.

App Bazaar

Installed Apps Available Apps

Install

Install an app for Free

Test out

Test the app with your trial number

Buy App

Happy with the app? 'Buy' it

Connect

Connect it to your company number

	NAME	EXOPHONES	CALL SETUP	SMS SETUP	DETAILS	UNINSTALL APP
	Call-TEST				Call Transfer Rs. 499/- per month  Purchased	
	ytdjv				Miss Call Rs. 200 per month  Purchased	

Uninstall App?

Are you sure you want to uninstall ytdjv?

NOTE: You will not be charged Rs. 200 per month after uninstall.

Cancel **Uninstall**

Step 2

You can re-subscribe to the App any time you wish again.

8.9. Frequently Asked Questions

8.9.1. How to edit IVR menu?

Select the call flow with the IVR you'd like to edit by following the steps given below:

1. Go to App Bazaar
2. Click on the Edit Call App next to the desired call flow
3. This will take you to the call flow consisting of the applets associated with it
4. Click on the applets until you reach the IVR applet and make the required changes
5. Click Save on the top right corner

App Bazaar **Installed Apps** **Available Apps**

Install **Test out** **Buy App** **Connect**

Install an app for Free Test the app with your trial number Happy with the app? 'Buy' it Connect it to your company number

Install an App.
Apps allow you to control what happens on a call, such as forwarding the call to other people, taking voicemails, playing audio or text to the caller, and more. You can install apps from our app store in a click of a button.

Install Apps

Custom Apps **Create**

NAME	EXOPHONES	CALL SETUP	SMS SETUP	APP ID	DELETE APP	DUPLICATE APP
Miss Call Test	None	Edit Call App	Create SMS App	1878		Duplicate
Timing	None	Edit Call App	Create SMS App	1860		Duplicate

Exotel **call transfer test** **Save** **Close**

Greeting

Connect

Voice Applets

Connect

How do you want to control your Connect params?

☒ Configure using flow builder here

Configure parameters dynamically by providing a URL

Primary URL: *

Enter URL here

Fallback URL (optional):

Enter fallback URL here

[Click here](#) for the list of parameters and how they can be controlled

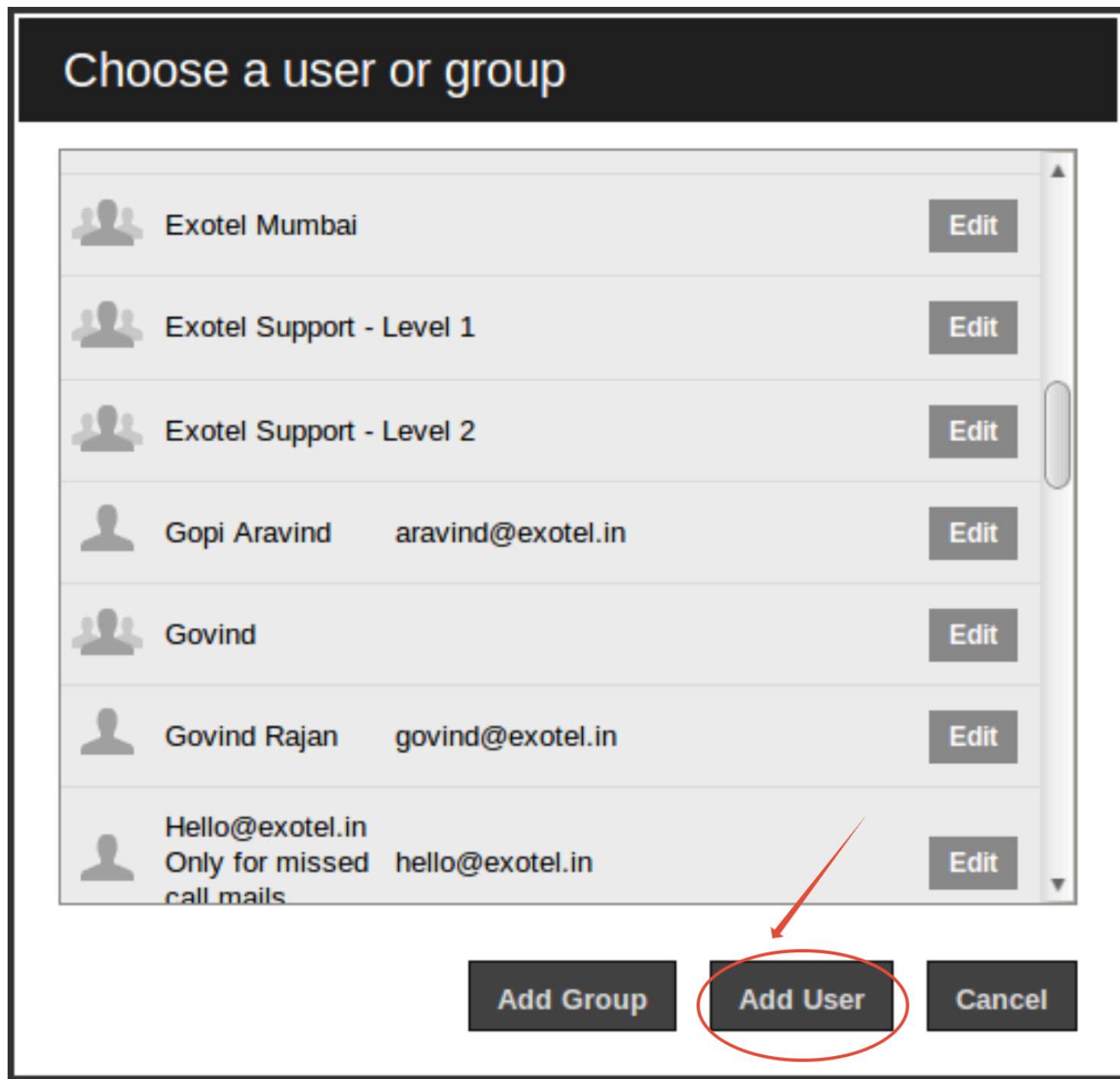
Dial Whom

And attach an ExoPhone number to proceed further.

Assign Exophone To A Call Flow

8.9.2. Why cant I find the users in "Choose a user or group"?

Not too long back, when you wanted to connect a call to your team, take voicemail or send an email, you had the ability to select a single user or a group. Something like this.



While this option was convenient, its drawback was also that it was convenient to send the call only to a user, and not a group. Over time, we were able to see the effects of this on the customer.

1. The clients regularly missed calls because there was only one user to take the calls.
2. If the call is routed to a group, in the inbox, you can see calls attended by groups. This isn't possible if you select a user and it would be very difficult to identify these calls which were routed to an agent via the call flow.

3. If you are connecting the call to just one person anyway, you never needed to use Exotel :)

Because these reasons made sense, we have removed the ability to select users to whom connect calls to or send voicemails. You will necessarily have to select a group as shown below:

Choose a group

	No Group	
		Edit
	Rachana	Edit
	Rashmi	Edit
	revanth_test	Edit
	Saif_Test	Edit
	Support and Sales SLA	Edit
	Support and Sales SLA - Hindi	Edit

Add Group

Cancel

8.9.3. Can I transfer my ExoPhone and the call flows from one account to another?

We can get this done for you. Please reach out to our Customer Happiness Team on any of the following details to help us transfer your ExoPhones and the corresponding call flows from one account to a different account of yours.

8.9.4. SSML Support in TTS (Text to Speech)

Exotel now supports all the SSML tags that are supported by Google TTS. Any applet that offers a Text To Speech service, like the **Greeting Applet, IVR Applet, Gather Applet**, etc. now supports SSML Tags. Campaign users can also now use this feature to power their static/dynamic campaigns!

Pre-requisites

1. Raise a request to hello@exotel.com/ your account manager to enable language support for TTS.
2. Ensure that "Tamil" is selected as the language when using SSML tags. (please use the <voice language> or <voice name> SSML tag to change the language to the desired one)

NOTE:- The special character & is not supported by Google TTS.

Ensure ASCII quotes [" or '] are used wherever necessary in the SSML tags and not curly quotes [“ or ’]

Customers can now use the whole range of customizations offered by Google TTS by wrapping their text around the relevant SSML tags and ensuring an elevated User Experience is delivered to their end-customers.

To showcase some of the capabilities that are now available, please refer to the following examples:

Options to **change Language, Gender and Accents**:-

1. With the "voice name" SSML tag, customers can choose from ~427+ different options that are offered via the Google TTS service.
2. This includes 49 different languages from across the globe
3. This also includes all the standard and premium voices as well: Standard, WaveNet, Neural2, Studio. Please note that the pricing for voices apart from Standard are significantly different.

Sample SSML wrapped text to use this feature:-

```
<speak><voice name="en-IN-Wavenet-D">Your Text</voice></speak>
```

```
<speak><voice language="en-IN">Your Text</voice></speak>
```

Please refer to the list of all the Voice Names and Voice Languages that are available here:-

<https://cloud.google.com/text-to-speech/docs/voices>

Options to **change the speed** at which the text is read out:-

1. There are multiple ways of reducing the speed/rate at which your text is read out to your end-customers. PFB a samples to achieve the same:-

```
<speak><prosody rate ="90%">Your Text</prosody></speak>
```

To learn more about the prosody element, see the W3 specification. You can also refer to this section of the google tts documentation to understand the prosody element.

1. Options to add a break of a few seconds between sentences.

```
<speak>Your text<break time="2s"/>Your text here as well </speak>
```


8.9.5. How can I setup a my own on-hold brand message instead of the default music?

Normally when your callers call your number and are waiting to be connected to your co-workers, they hear on-hold music like this...

https://s3-ap-southeast-1.amazonaws.com/exotelaudiouploads/macroform-cold_day_mod3.wav

If you instead want to play a recorded brand message or any other promotional offer along with different background music, you need to install the "Speak Your Brand" App.

How does it work?

- 1) First you need to enter the text you want your callers to hear when they are waiting to be connected. We suggest you start off with a "Thanks for calling, we will be with you shortly" and then talk about your promotional offer or other info you want to convey. We will get this message recorded by a professional voice-over artist.
- 2) then choose background music to be played for the message (above). We have a choice of 5 BGMs. If you insist, you can also provide us with any music of your choice (outside of the 5 options) and email it to hello@exotel.in. We will use that as the bgm for the message.
- 3) We will take up to 2 working days to record and upload the music to your App. Once the app is ready you will receive an update via email.

When does the music get played?

This music is played to the caller...

- 1) Whenever we try to connect the caller to your agent
- 2) When the caller is waiting in the queue if all your agents are busy

Exceptions:

This music is not played in the following scenarios -

- 1) If you are using an app-builder and when there is no greeting or menu applet before your connect applet. In this case, the caller will hear just tring...tring.
- 2) If you have already set up custom queuing music as part of your connect applet. In this case, your specific queuing music will take precedence over this music.

You can customize the music on hold from within your call flow by using the Custom Queue music from the connect applet as shown below

Music on hold ?

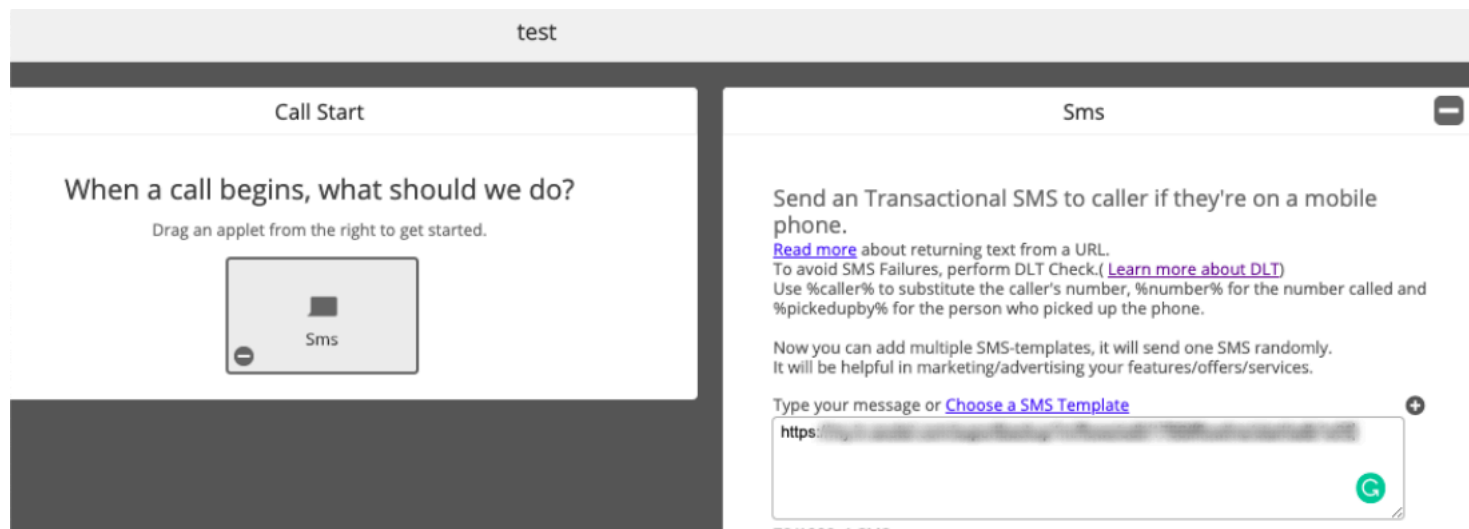
☐	Default Tone
☒	Custom Tone
	Audio from URL Link to the URL having audio file
	Upload WAV or MP3 audio file

8.9.6. Why is my missed call app not disconnecting immediately?

When customers call on the ExoPhone that is connected to a missed call app, they hear tring-tring for a long time (6 or 7 times) before it gets disconnected. How can I make this shorter? (1 or 2 rings).

Solution: A typical missed call app will have either an SMS applet and/or a URL ping to your server (through passthru or a similar applet).

Here is an example of a typical missed call flow using the App builder:



The above flow will pass along the details of the caller to your server. If that URL returns back a text, it will send as an SMS and then the call is disconnected (This is now a missed call, that is, the call went "tring tring" and then after a few rings, the call got cut and the caller received an SMS. Because no one picked the call - The caller would not get charged for this call).

Here is how it would look if you use a variation of the missed call app:

The below installation of 'Miss Call Plus' app adds the caller's phone number to a List called "Test List" and sends an SMS confirming the same. It also passes the caller's information to a URL called <http://yourserver.com/passthru.php>

Miss Call Plus

Choose a name for this App...

Test

Configure the app:

- ☒ Passthru
- ☒ SMS
- ☒ List Manager
- ☒ Hang-Up

passthru URL...

http://yourserver.com/passthru.php

Respond to the caller with the following SMS...
(Type your message or [Choose a SMS Template](#))

This is a test message being sent using Exotel with a (%s) and (%d). If this is being abused, report to 08088919888



115/1000, 1 SMS

Then...

Add

the caller to this list...

Test list

Add a list [here](#) if you don't have one

Missed Call Plus App helps you run missed-call subscription campaigns and feedback collection campaigns within minutes. You can now, create a list of such customers and use it for marketing campaigns in the future.

As soon as your customers call your number

Reply with an SMS

Missed Call Plus App lets you respond to your customer with a Thank you message

Add/Remove customer from a list

Subscribe or un-subscribe them from a list

Install

In both these cases, the caller will keep hearing a "tring-tring" as long as all these things happen:

- Exotel calls the URL provided in the app
- Your server returns back with a valid response
- Exotel tries to send an SMS

Typically, Exotel will be very fast in calling your server and in sending SMS. The only other point to note here is the time it takes for Exotel servers to talk to your server. To reduce the time length - try to profile how long it takes for your server to return back with a response. Our tips on investigating if Passthru is slowing the call is relevant.

8.9.7. Will 'Click to Call' App work in an HTTPS page? Print

Situation: We recently moved our site to HTTPS, and noticed that the C2C widget is being blocked by some browsers (example: Chrome Version 23.0.1271.64) as insecure content. This is breaking the support functionality. Can you please suggest how to go about this issue?

Answer: "Iframe" is the answer. Put the C2C widget inside an http iframe.

8.9.8. How "Text to Speech" sound like? or Test out greeting applet Robotic voice

Text to speech is magical. This technology enables us to type out text and get the computer to read (or say) it just like a human! You will encounter Text to speech at various places in exotel platform such as [Greeting Applet](#) and [IVR Menu](#). You just need to type in the text that you want to read out and voilà..!

Exotel currently uses the free & open source Festival Text to speech engine presented to the world by the Center for speech technology research at the University of Edinburgh & Amazon Polly. This engine needs to be powered by a speech synthesis voice library which, for our understanding, is like a dictionary of all the possible pronunciations spoken by a single person packed as a library.

HMM based Synthesiser built by Carnegie Mellon University to be most understandable by an Indian audience.

Consider using our TTS only when testing your app (Typically on a trial number) or when you don't have a choice (Like reading numbers that the user has entered!)

How To:

- Login to your Exotel Dashboard

my.exotel.com Incognito

exotel

Call SMS

Credits: 15840
Validity: Aug 6, 2020

YOU ARE IMPERSONATING! Be careful about what you do while you are here

CALLS	SELECT	DELETE	REFRESH	25	SEARCH
Inbox Old					
Inbox	☐	☐	☐	Tue, 27 Aug 2019 10:24:07	kanatani L...
SMS	☐	☐	☐	Tue, 27 Aug 2019 10:22:12	kanatani L...
Outbox	☐	☐	☐	Mon, 19 Aug 2019 16:18:51	kanatani L... AM [Sales]
TOOLS	☐	☐	☐	Mon, 19 Aug 2019 11:36:39	kanatani L... AM [Sales]
Campaigns	☐	☐	☐	Mon, 19 Aug 2019 11:13:22	kanatani L... AM [Sales]
CONTACTS	☐	☐	☐	Tue, 13 Aug 2019 17:37:48	kanatani L...
Address book	☐	☐	☐	Thu, 01 Aug 2019 18:13:49	kanatani L...
Co-workers and Groups	☐	☐	☐	Thu, 01 Aug 2019 16:01:28	kanatani L...
ADMIN					
App Bazaar					
ExoPhones					
SMS Configurations					
Analytics					
Access Control					
Co-worker Activity Log					
Heartbeat Beta					
Reports					
SETTINGS					

Support 1 - 8 / 8

- Click on App Bazaar from the left panel



Available: sudhir.koushi@exotel.com

MEMBER SINCE 1999

ON

Balance: ₹1,160

Validity : Apr 11, 2020

- TOOLS
- Campaigns
- CONTACTS
- Address book
- Co-workers and Groups
- ADMIN
- App Bazaar**
- ExoPhones
- SMS Configurations
- Analytics
- Access Control
- Co-worker Activity Log
- Heartbeat Beta
- Reports
- SETTINGS
- Audio Library
- SMS Template
- Sender ID
- API
- Personalization

Custom Apps + Create

NAME	EXOPHONES	CALL SETUP	SMS SETUP	APP ID	DELETE APP
Taxipanner Support	None	Create Call App	Create SMS App	163983	
GoraTechApplet	TRIAL NUMBER 01951 3886363 Pin: 9876 1150-07	Edit Call App	Create SMS App	167496	
Dial 1029 for Transfer	None	Edit Call App	Create SMS App	46279	
Spamcheck	01140844791	Edit Call App	Create SMS App	45794	
App	None	Edit Call App	Create SMS App	45717	
Demo	None	Create Call App	Create SMS App	44634	
Gurima Chhabra	None	Edit Call App	Create SMS App	23041	
IVR - Self Efile	None	Create Call App	Create SMS App	10889	
IVR Step 15	None	Edit Call App	Create SMS App	10888	
IVR Step 14	None	Edit Call App	Create SMS App	10887	

- Go to the Edit Call App, where you need to make changes



[Feedback](#), [Contact Us](#)
MEMBER SINCE 1998

ON
Home
Help
INR
Settings
Logout

[Call](#)
[SMS](#)

Balance: ₹1,160
 Validity : Apr 11, 2020

TOOLS

Campaigns

CONTACTS

Address book

Co-workers and Groups

ADMIN

App Bazaar

ExoPhones

SMS Configurations

Analytics

Access Control

Co-worker Activity Log

Heartbeat Beta

Reports

SETTINGS

Audio Library

SMS Template

Sender ID

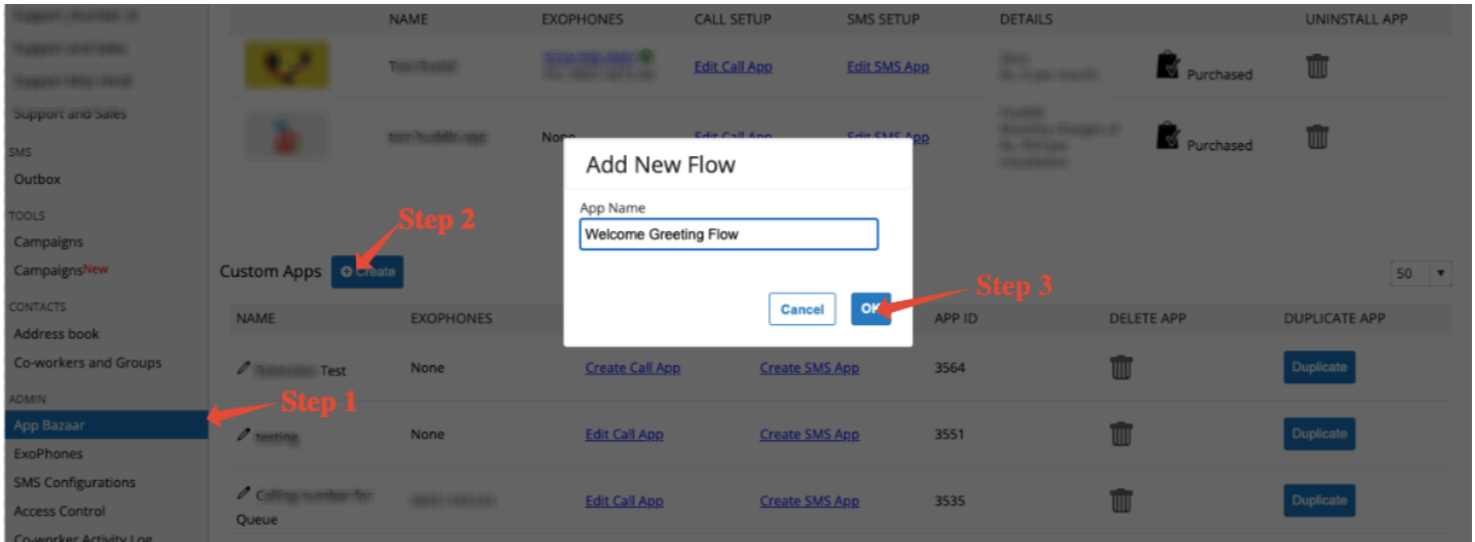
API

Personalization

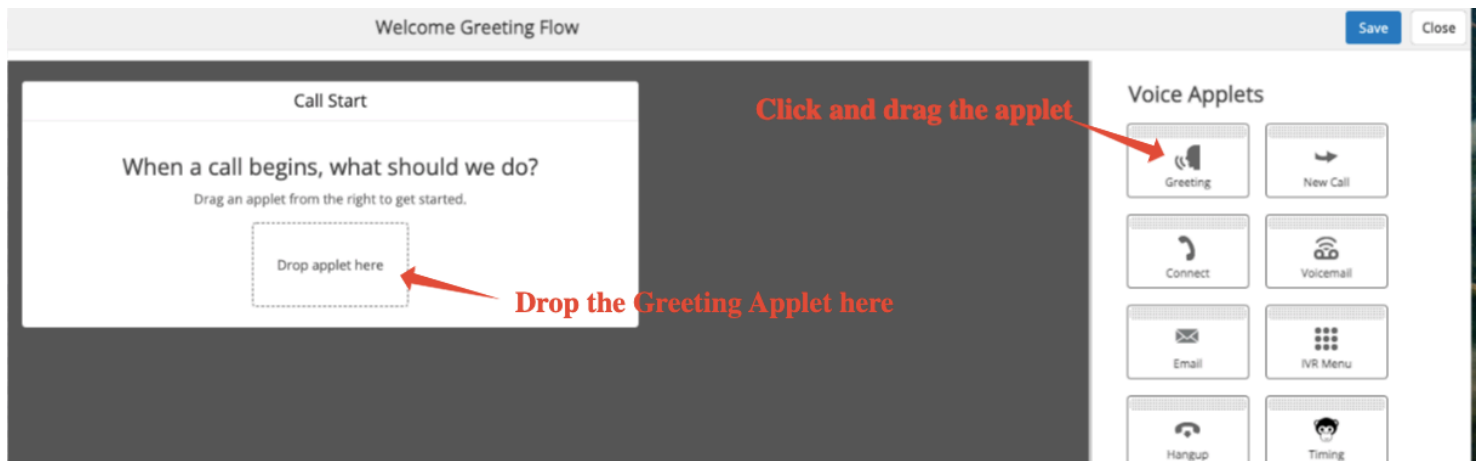
Custom Apps Create

NAME	EXOPHONES	CALL SETUP	SMS SETUP	APP ID	DELETE APP
Taxipanner Support	None	Create Call App	Create SMS App	163983	
GoraTechAppllet	TRIAL NUMBER: 01911 3886363 Pin: 98765 1150-07	Edit Call App	Create SMS App	167496	
Dial 1029 for Transfer	None	Edit Call App	Create SMS App	46279	
Sparacross	01140344791	Edit Call App	Create SMS App	45794	
App	None	Edit Call App	Create SMS App	45717	
Demo	None	Create Call App	Create SMS App	44634	
Gurima Chhabra	None	Edit Call App	Create SMS App	23241	
IVR - Self Efile	None	Create Call App	Create SMS App	10889	
IVR Step 15	None	Edit Call App	Create SMS App	10888	
IVR Step 14	None	Edit Call App	Create SMS App	10887	

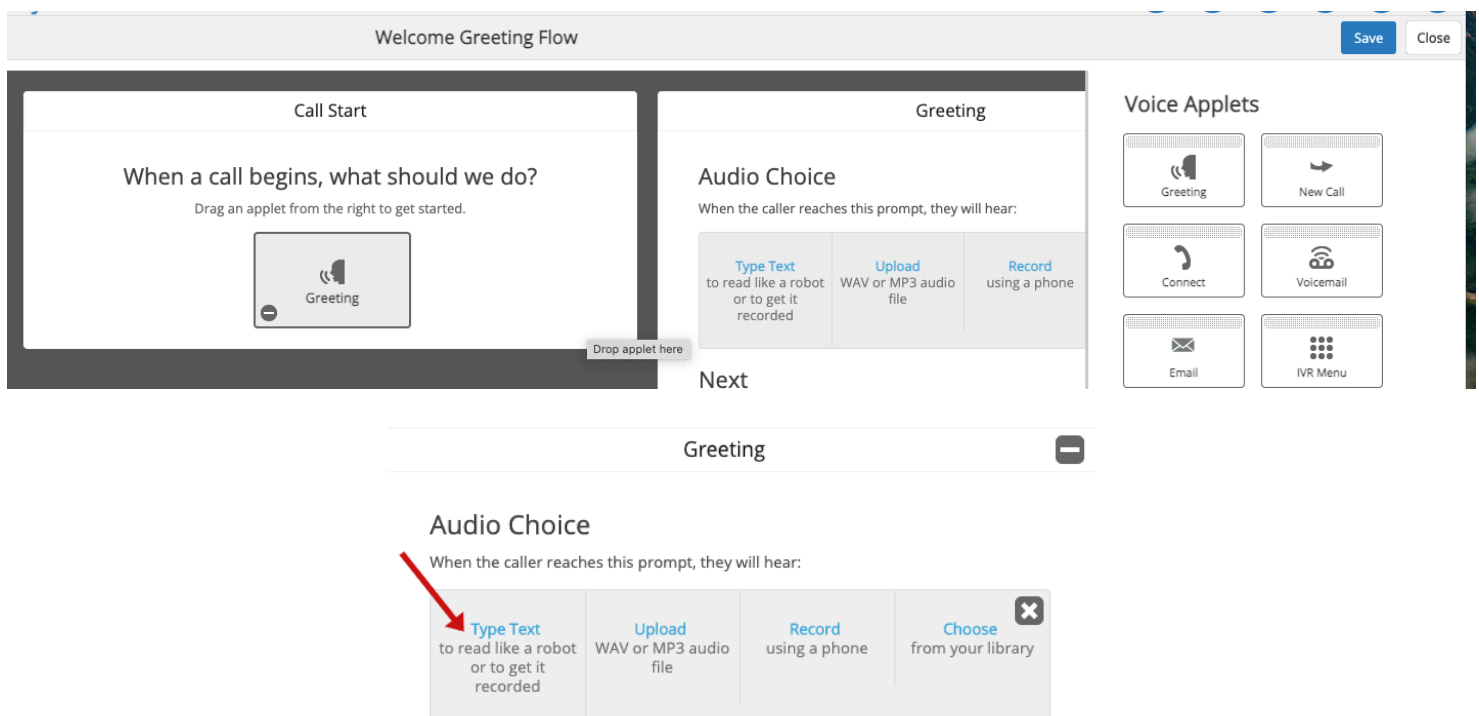
If you wish to create a new call flow to test out how text to speech sounds like then follow the steps below. After you create the flow refer to this article for [Assign Exophone To A Call Flow](#) to make test call to hear how the robotic voice sound



You will be taken to the flow builder once you click on the **OK** button.



Click on the Greeting applet to add the text



Once the Greeting text is typed, **Click on Save**.

Greeting

—

Audio Choice

When the caller reaches this prompt, they will hear:

Read Text like a robot...Learn more about [how this will sound](#)
×

You can also put a URL above that returns plain text which will be read out

Get this text Recorded
Save

Save the text

The system read out the text that you enter in this section and click on the Save button (Robotic Voice will be played)

If you wish to get the text recorded by the voice-over artist (**Tariff will be applicable**) then click “Get this text recorded”. Refer to this article for more details: [Voice over recording ?](#)

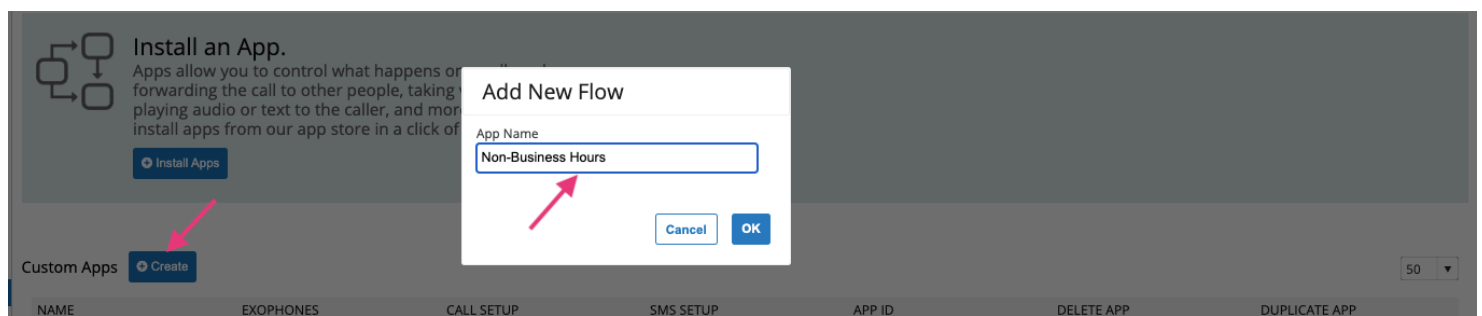
8.9.9. Handling calls on holidays, company shut downs and non-business hours.

We have made this easy for you. You have the option to relay a piece of certain information, record the voice messages of your customers/clients when they try reaching your team during non-business hours or holidays. You would need to integrate a [Timing Applet](#), [Voicemail Applet](#), or a [Greeting Applet](#) depending on your requirement. You can integrate this feature with your existing flow and you do not have to build a new one just to attend to the calls that you receive after business hours, or on holidays.

Option 1: Voicemail

You are going to now create an easy Call flow that will wish your customers and then take a voicemail.

Step 1: Create a new call Flow and name it, perhaps, "Company Closed/Non-Business hours":



Step 2: Drag & Drop the [Voicemail Applet](#) & type out a relevant message to keep your customer informed. All the voicemail will be available in the inbox and the agents part of the group which was selected in the Voicemail will be notified about the recordings.

Option 2: Using Happy Hours App

Please be advised that this is a chargeable feature. You can try using our [Timing Applet](#) for which you will not be charged and it is very similar to this paid application.

Unselect the day when you are closed. All the way down in the option that says "If the person calls during closed hours...", change the recording to inform him that you are closed because of a holiday. Please do remember to set up a reminder in your calendar to change the recording as soon as your business starts operational after the holiday.

Choose a name for this App...

Support Calls

Greet the callers with...

Type Text

to read like a robot
or to get it recorded

Upload

WAV or MP3 audio
file

Record

using a phone

Choose

from your library

Which days of the week are you open:

- ☐ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday
☐ Sunday

What are your open hours: 09:00 AM to 06:00 PM

If a person calls during the open hours, which user/group should receive the call:

Select a User or Group



After the call, who should receive an email regarding the call:

Do not choose any user/group to not send an email

Support

Select a User or Group



If the call is not answered the voicemail should be emailed to...

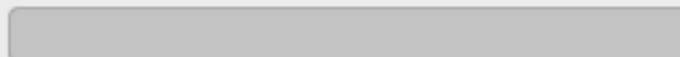
Do not choose any user/group to not send an email

Select a User or Group



If the person calls during closed hours, play the following prompt for voicemail

Play Recording



[edit](#)

If the person calls during closed hours, the voicemail should be emailed to...
Do not choose any user/group to not send an email

Select a User or Group



Option 3: Inform & Hangup

If you just want to inform the user about your company closure, then use the [Greeting Applet](#) followed by a Hangup. Additionally, consider sending him an SMS with the date & time when your company will be open next so that he can call.

9. Dashboard

9.1. Login & Recovery

9.1.1. Signup

Your journey with Exotel starts when you register with us for a Free Trial account. All it takes are a few simple steps :



Sign me up for a trial account

Get free call and SMS credits when you sign up.

Name *

Company *

Email *

Mobile number *

Exotel trial works with a valid phone number

Primary Country of Operation *

Industry

Sign up

By clicking on the above button, You agree to our [terms of service](#) and [privacy policy](#).



Get started for free

What's included in your 15 day trial.

- **A suite of communication products**

Enable, automate & monitor your customer communication with features like smart IVR, dialers, alerts, verification, reports, campaigns and more.

- **Seamless integrations**

Integrate natively with all your favourite CRM & helpdesk solutions. Access to easy programmable APIs for any custom integrations.

- **Join 5000+ companies**

Experience the cloud promise delivered to global customer-driven brands.

1. Once you click on "Sign Up", you will be taken to the registration page where you need to fill in your name, company name, email, phone number, and country of operation.
2. Upon filling these fields and clicking "Sign Up", we will send you a verification email in the number provided.
3. This email shall contain a link from where your email is verified and we ask you to set the password for your account [our executives will never ask for your password, please do not share with anyone].
4. When you have set the password, all you need to do is log in to your account with your email id/phone number and your password, and you are registered for an Exotel account!

Our **Trial Account** has all the features and functionalities of a full-paying account. The idea behind this is to allow you the freedom to test any and all features of Exotel you might be interested in to help you make up your mind.

If you're unsure about where to get started, this article gives you a list of tasks you can perform in your Exotel trial account.

9.1.2. Sign In

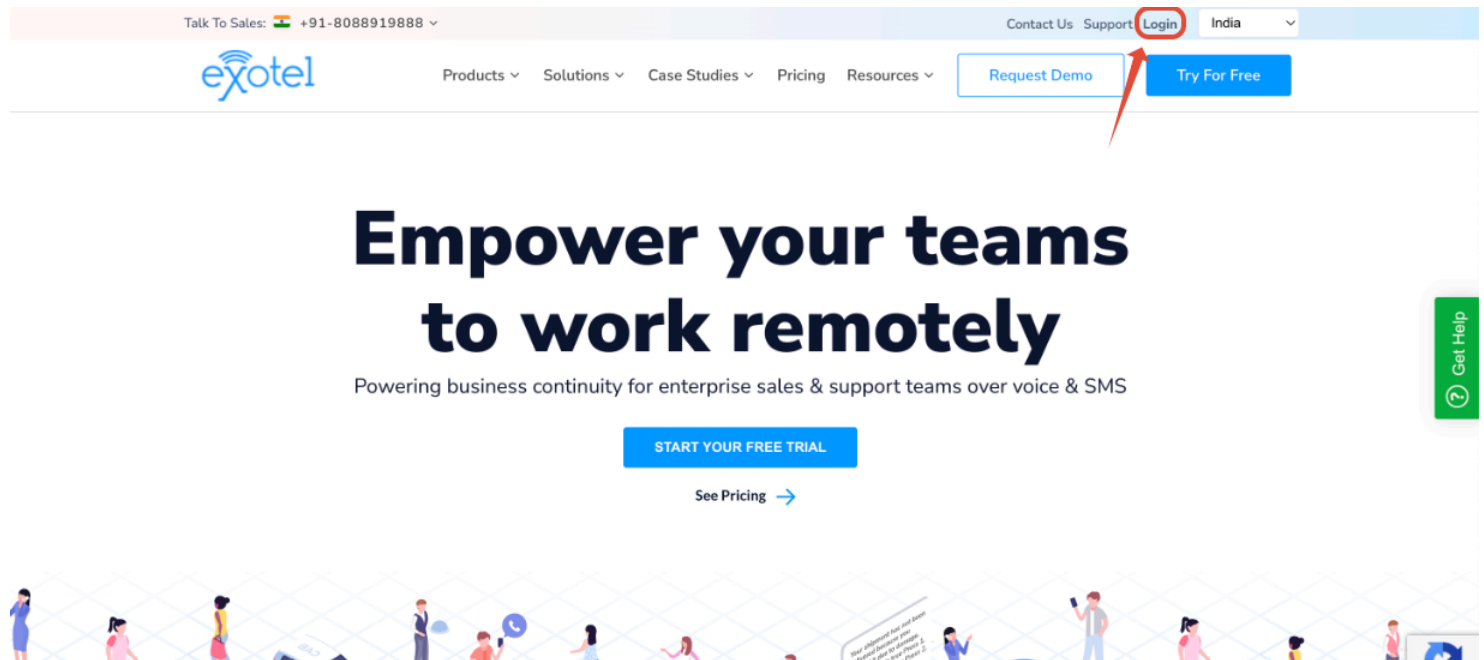
To access your Exotel account, you can login from a computer, phone (Chrome browser) or tablet.

Enter the below URL to login to your Exotel account.

Universal URL: **my.exotel.com**

Note: (If your account is registered under the Mumbai cluster then use **my.in.exotel.com** for the login page)

Else you can visit the exotel.com site and click on the Login button that you see on the top right of the page.



On your computer or mobile browser, go to the Exotel login page.

Welcome

Login to Exotel Dashboard

Email address

|

CONTINUE

[Forgot email?](#)

Need help? Email us at hello@exotel.com

Enter your Exotel Account email id and password.

Enter Your Password

Edit

Password

LOG IN

[Forgot password?](#)

Need help? Email us at hello@exotel.com

Tip: If you're signing in to a public computer, make sure to sign out before leaving the computer.

9.1.3. Personal Info

If you are signed in, but can't remember your Email Id, you can find it in the personal info section in your sidenav.

Follow the steps to find your Email Id:

- Login in to the Exotel Dashboard
- Find My Account Section in the side navigation, click on the Personal Info
- You will get an Email address for login, highlighted in the box

Call

SMS

Personal Info

Company Info

Settings

KYC Docs

Notification Settings

Whitelist Settings

API Settings

PAYMENT

Make a Payment

Payment History

Bill Plan

Bills

My Account

E-Mail Address

abc@xyz.in

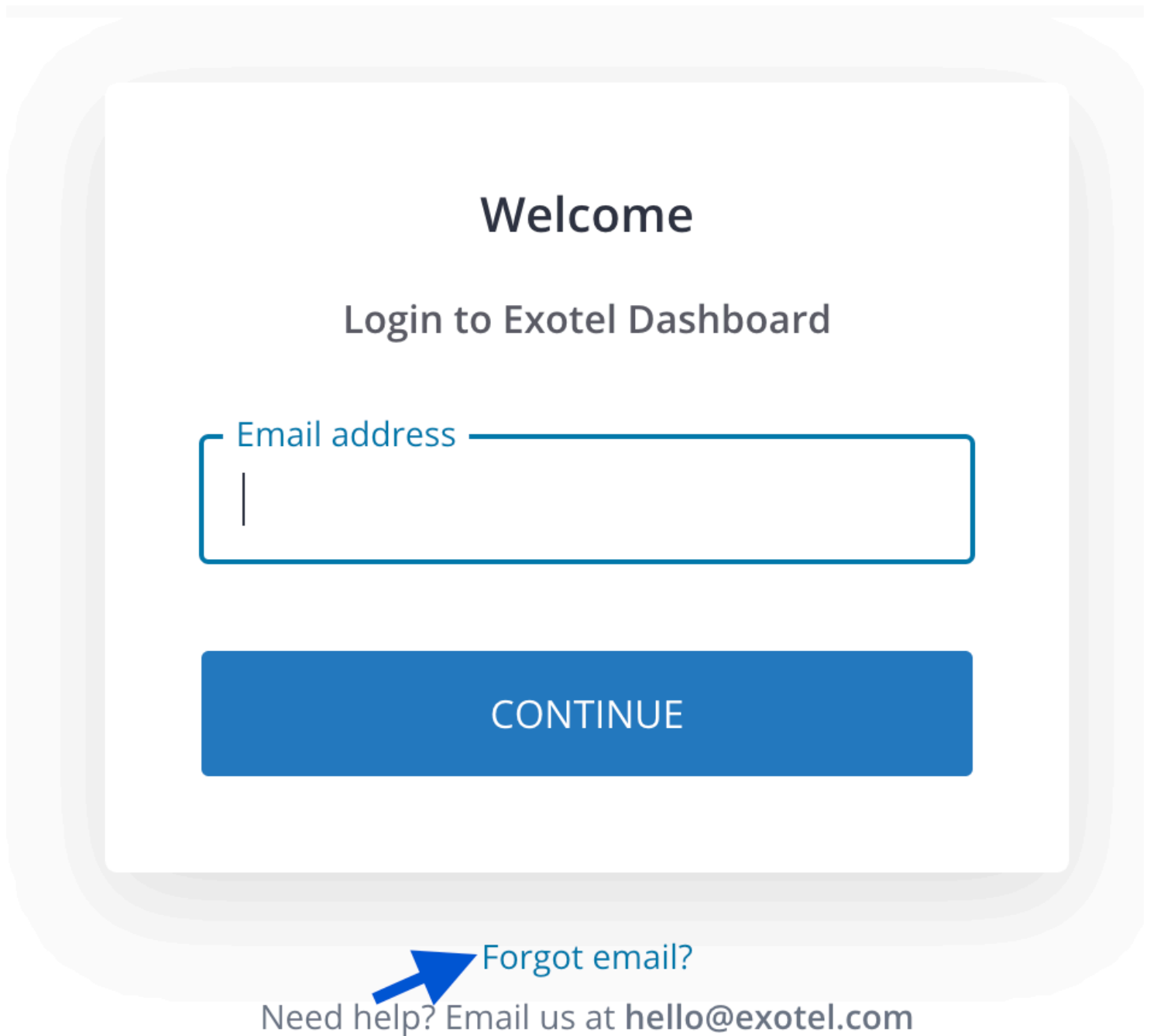
Change password

9.14. Forgot email

Follow the steps to find your email id. You'll need to know:

1. A registered and verified phone number linked to your account
2. Follow the instructions to confirm it's your account.
3. You'll see a list of Accounts that match your registered and verified phone number.

Follow the steps to recover your Email Id

A screenshot of the Exotel dashboard login interface. The background is a light gray with a large, rounded rectangle containing the login form. The form has a white background and a blue border. At the top, the word "Welcome" is centered in a large, bold, black font. Below it, "Login to Exotel Dashboard" is centered in a smaller, bold, black font. There is a text input field with the placeholder text "Email address" in blue. The input field has a blue border and a vertical cursor. Below the input field is a large, solid blue button with the word "CONTINUE" in white, uppercase letters. At the bottom of the form, there is a link "Forgot email?" in blue text. A blue arrow points from the "Forgot email?" link to the text "Need help? Email us at hello@exotel.com" which is in a dark gray font.

Click on the forgot email link to recover your Email Id

Find Your Email



Phone No.

CONTINUE

i Currently, email recovery with phone number is supported for indian user only. For international user please contact hello@exotel.com

[Back to Login](#)

Need help? Email us at hello@exotel.com

Enter your registered and verified phone number to recover your Email Id

Verify OTP

Please enter the OTP sent by SMS to

[Edit](#)

VERIFY

Resend OTP by [SMS](#) [CALL](#)

[Back to Login](#)

Need help? Email us at hello@exotel.com

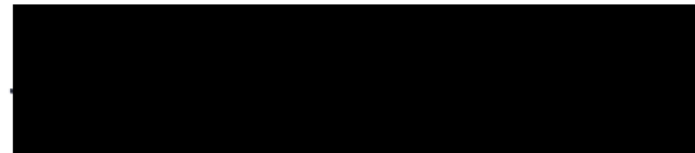
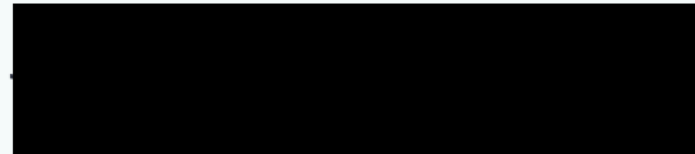
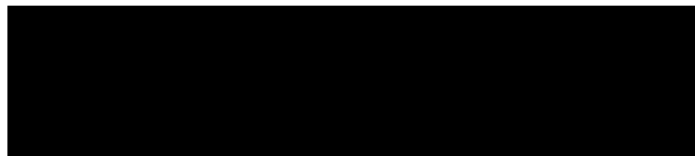
If the entered phone number is registered and verified with us, we will send you an OTP to verify your identity



Verified Successfully!



Choose Your Account



[Back to Login](#)

Need help? Email us at hello@exotel.com

If you have entered the correct OTP on the OTP screen, your identity will be verified and you will see a list of account linked to your phone number

- Click on the Email Id for which you want to login

Enter Your Password

[Edit](#)

Password



LOG IN

[Forgot password?](#)

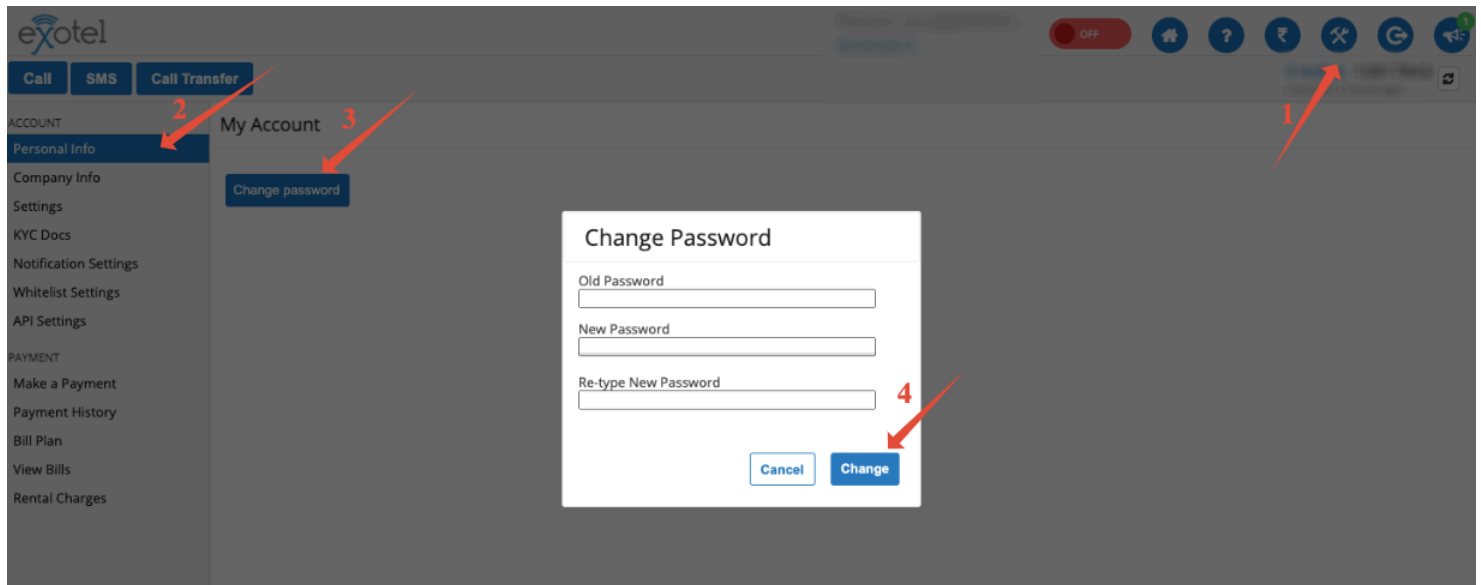
Need help? Email us at hello@exotel.com

It will redirect you to the login page pre-filled with your Email Id

9.1.5. Change Password

You could also change your password from inside the app, once you log in.

1. Click on My Account on the top left,
2. Personal info on the left and then on "Change password", like this:
3. Enter your old password and then set a new password.
4. Click on Change.



9.1.6. Forgot Password

You can change your password for security reasons or reset it if you forget it. Follow the steps to change/reset your password.

Access password reset

You'll need to know:

1. A registered and verified phone number linked to your account
2. Follow the instructions to confirm it's your account.
3. You'll get a password reset link on your registered and verified Email Id/phone number
4. Create a new password for your account.

Enter Your Password

Edit

Password

LOG IN

[Forgot password?](#)

Need help? Email us at hello@exotel.com

Click on forgot password link to reset your password

Reset your password

☐ Email ID
 ☒ Phone No.

 +91

Phone No.

CONTINUE

i Currently, resetting password with phone number is supported for Indian user only.

[Forgot email?](#)

[Back to Login](#)

Need help? Email us at hello@exotel.com

Choose a way using which you want to reset your password

Reset with email

Reset your password

☒ Email ID ☐ Phone No.

Email

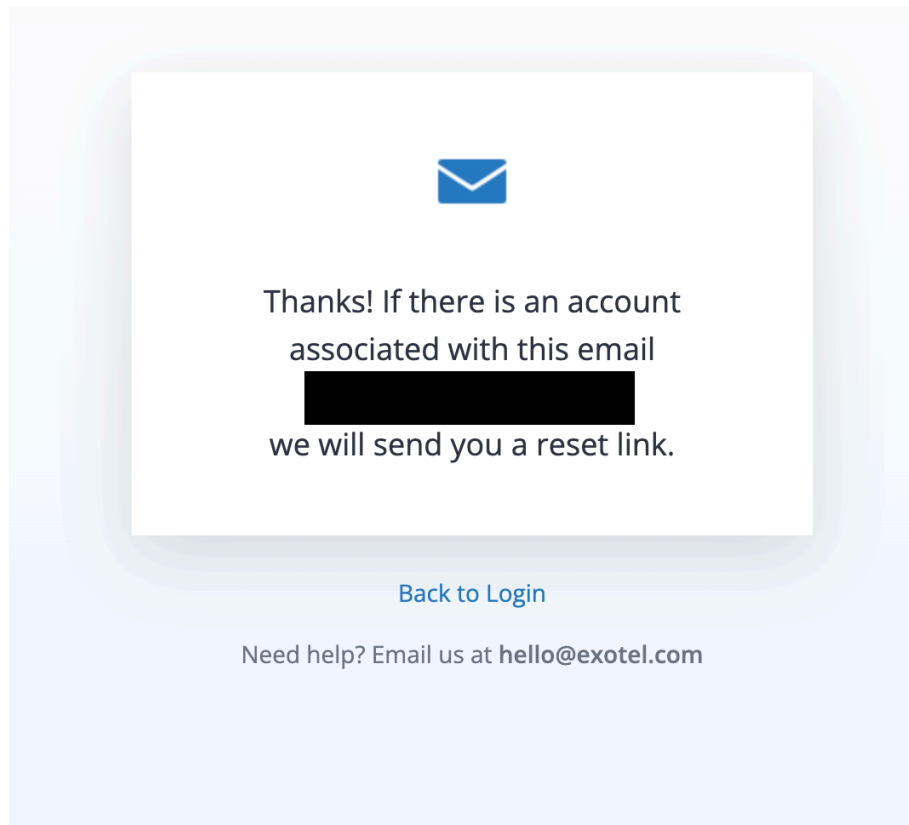
CONTINUE

[Forgot email?](#)

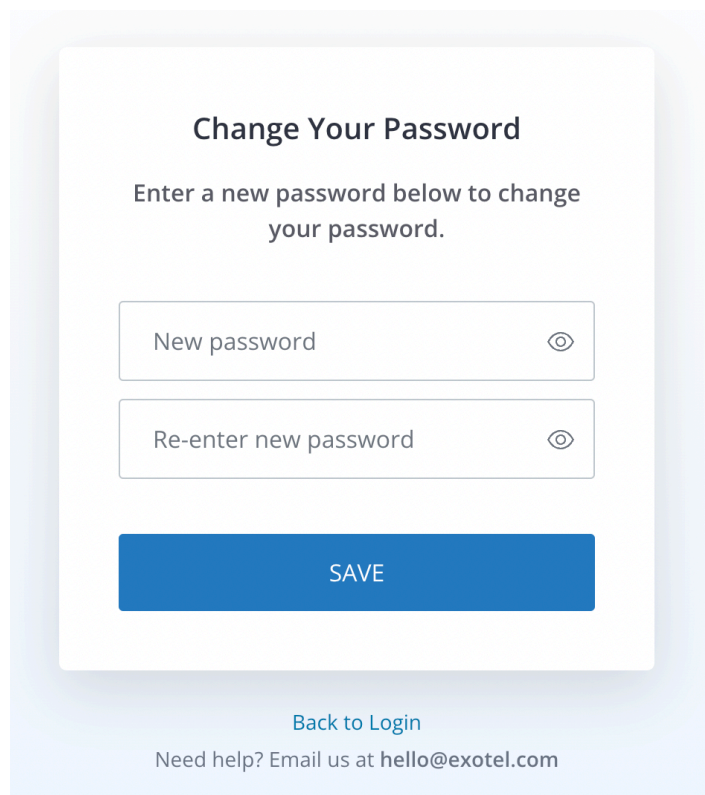
[Back to Login](#)

Need help? Email us at hello@exotel.com

Enter your registered and verified Email Id for which you want to reset your password



If the entered Email Id is registered and verified with us, we will send you a reset link on your Email id as well as on your registered and verified phone number



Once you click on the reset link, it will ask you to create a new password for your account

Create a strong password for your account, and make sure you fulfill all the asked requirements for your password



Password Changed!

Your password has been changed successfully.

[Back to Login](#)

Change Your Password

Enter a new password below to change your password.

New password

.....



Re-enter new password

.....



Your password must contain:

- ✓ At least 8 characters
- ✓ At least 3 of the following:
 - ✓ Lower case letters (a-z)
 - ☐ Upper case letters (A-Z)
 - ✓ Numbers (0-9)
 - ✓ Special characters (ex. !@#\$%^&*)

SAVE

Once you save the password you can go back to the login page and use this new password for the login

Reset with Phone number

Reset your password

☐ Email ID
 ☒ Phone No.

 +91

Phone No.

CONTINUE

i Currently, resetting password with phone number is supported for Indian user only.

[Forgot email?](#)

[Back to Login](#)

Need help? Email us at hello@exotel.com

Enter your registered and verified phone number to reset your password

Verify OTP

Please enter the OTP sent by SMS to
[Edit](#)

6

3

0

5

1

6

VERIFY

Resend OTP by [SMS](#) [CALL](#)

[Back to Login](#)

Need help? Email us at hello@exotel.com

If the entered phone number is registered and verified with us, we will send you an OTP via SMS to verify your identity

We have sent you an OTP, if not received please check/edit entered phone number for typing error. If the issue still persists contact hello@exotel.com ×

Verify OTP

Please enter the OTP sent by SMS to
+9108047182701 [Edit](#)

|

VERIFY

Resend OTP by [SMS](#) [CALL](#)

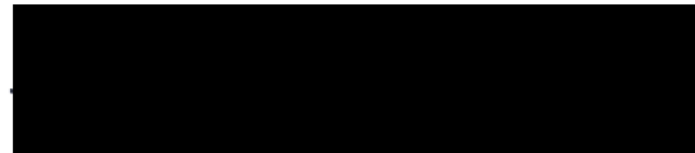
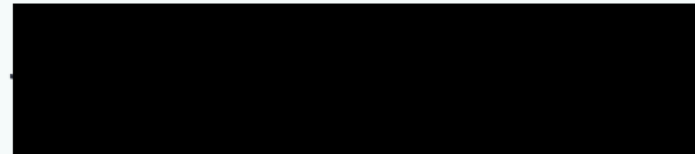
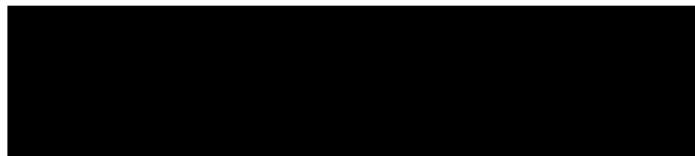
If you are using a Landline number, you would need to wait for the OTP SMS to expire post and you will get an option to receive OTP via call.



Verified Successfully!



Choose Your Account



[Back to Login](#)

Need help? Email us at hello@exotel.com

If you have entered the correct OTP on the OTP screen, your identity will be verified and you will see a list of accounts linked to your phone number

Click on the account for which you want to reset the password

Change Your Password

Enter a new password below to change your password.

👁

👁

SAVE

[Back to Login](#)
 Need help? Email us at hello@exotel.com

Once you selected the account, it will ask you to create a new password



Password Changed!

Your password has been changed successfully.

Back to Login

Change Your Password

Enter a new password below to change your password.

New password

.....
👁

Re-enter new password

.....|
👁

Your password must contain:

- ✓ At least 8 characters
- ✓ At least 3 of the following:
 - ✓ Lower case letters (a-z)
 - ☐ Upper case letters (A-Z)
 - ✓ Numbers (0-9)
 - ✓ Special characters (ex. !@#\$\$%^&*)

SAVE

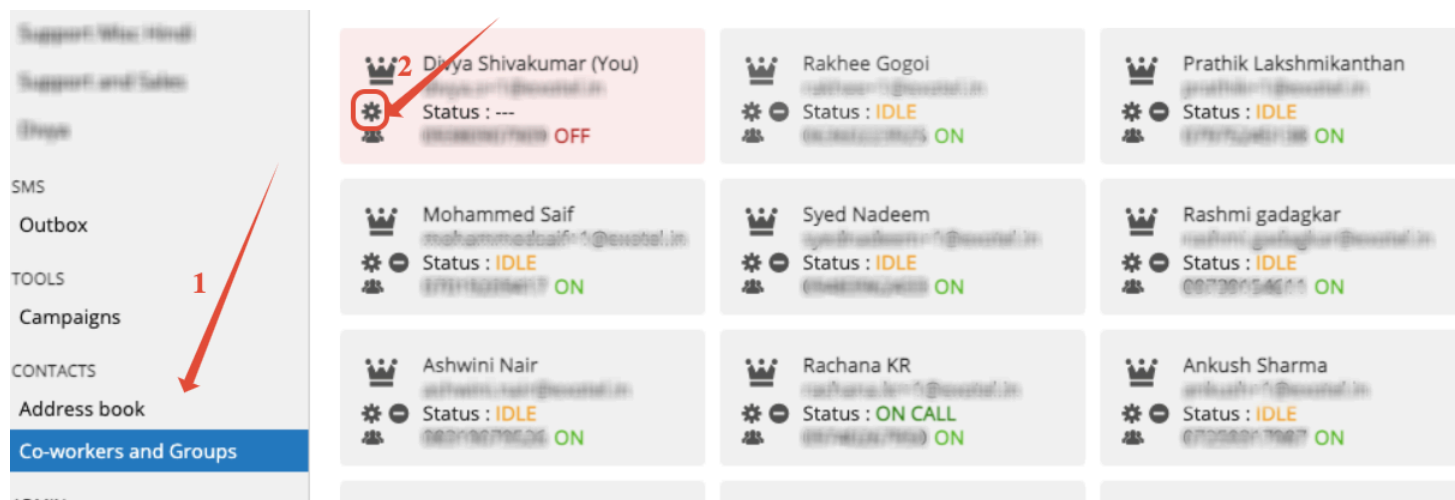
Create a strong password for your account, and make sure you fulfill all the asked requirements for the password

Once you save your password you can go back to the login page and use this new password for the login

To protect your account, we limit the number of times you can attempt recover email id via phone number Exotel temporarily disables a particular account reset option after too many incorrect attempts. The recovery option will be re-enabled on the next day. In the meantime, you can contact hello@exotel.in

9.17. Change Your Phone Number

You can edit your personal phone number on the "Co-workers & Groups" Page



Go to the 'Co-workers & Groups' page on the dashboard and then click on the gear icon right next to your (or whoever's) name

Once you have entered these details, you will find that your number is configured. Also, to verify the newly added number, you need to place a missed call from this newly added number to 09513885656.

Edit user details

First Name

Last Name

Email

Email is not Editable

Mobile or Land-line Number

You can change your Number here

When a call is routed to this person, this is the number that will be called.

ON

To save the changes Click on Ok

NOTE:

1) You will be charged per user based on your User Billplan
Your current User Billplan : all users @ 0.0 credits per user per month
2) To verify your number,
a) Please give **missedcall** from newly added number to 02249360005
b) Get a **verification call** from Exotel

Cancel

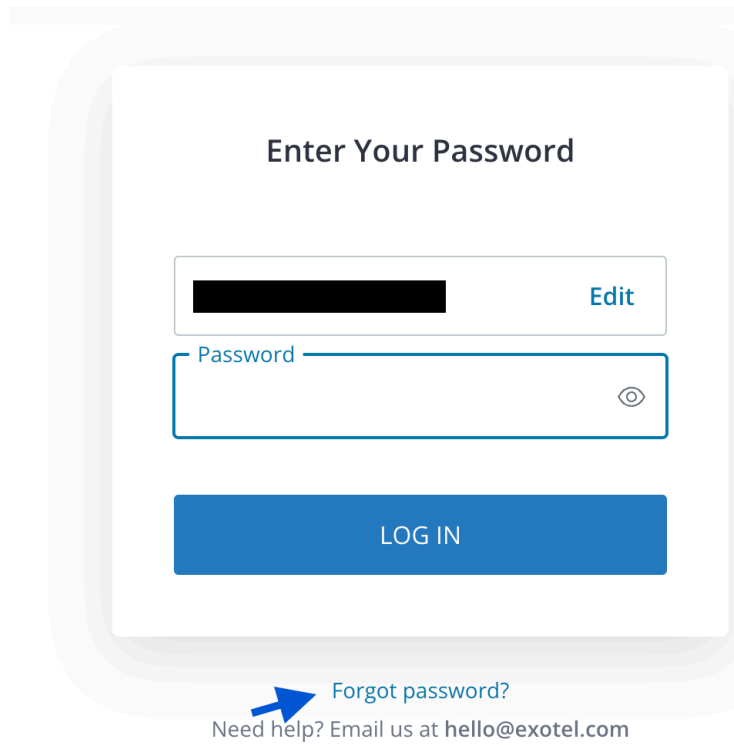
OK

A pop-up opens up. Enter the user details and number. (Enter 0 followed by mobile number)

9.1.8. Recover Account

If you've forgotten your password, email ID, or cannot receive OTPs, you can recover access to your Exotel account using the methods below.

Resetting Your Password



The screenshot shows a login form titled "Enter Your Password". It contains a password input field with a blacked-out password and an "Edit" link. Below it is a "Password" label and a toggle icon (an eye). At the bottom of the form is a blue "LOG IN" button. Below the form, there is a blue arrow pointing to the text "Forgot password?". Below that, it says "Need help? Email us at hello@exotel.com".

Click on forgot password link to reset your password

Reset your password

☐ Email ID
 ☒ Phone No.

 +91

Phone No.

CONTINUE

i Currently, resetting password with phone number is supported for Indian user only.

[Forgot email?](#)
[Back to Login](#)
 Need help? Email us at hello@exotel.com

Choose a way using which you want to reset your password

Reset Password with Email

Reset your password

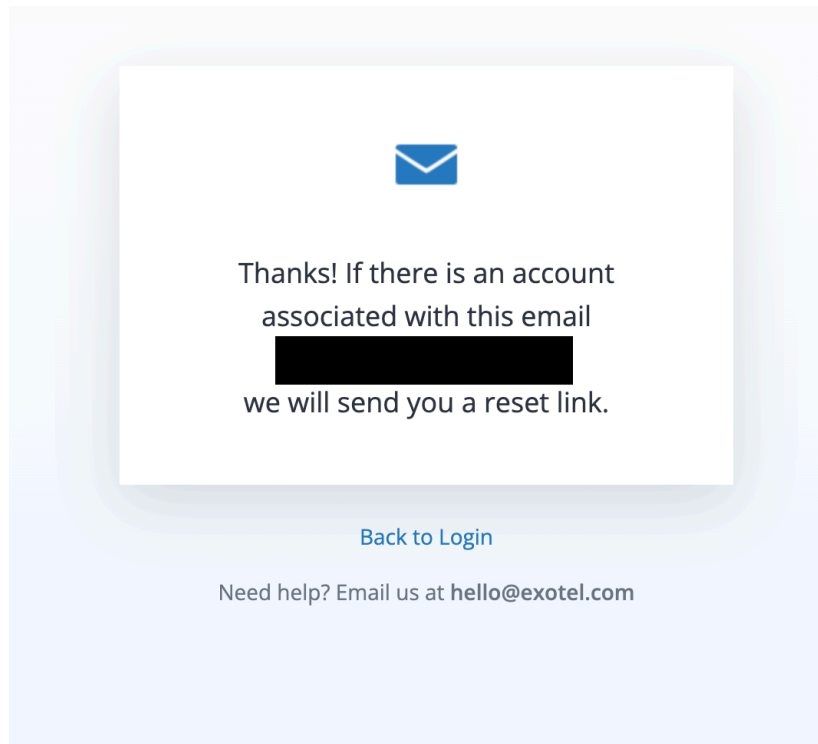
☒ Email ID
 ☐ Phone No.

Email

CONTINUE

[Forgot email?](#)
[Back to Login](#)
 Need help? Email us at hello@exotel.com

Enter your registered and verified Email Id for which you want to reset your password



If the entered Email Id is registered and verified with us, we will send you a reset link on your Email id as well as on your registered and verified phone number

Change Your Password

Enter a new password below to change your password.



SAVE

[Back to Login](#)

Need help? Email us at hello@exotel.com

Once you click on the reset link, it will ask you to create a new password for your account

- Create a strong password for your account, and make sure you fulfill all the asked requirements for your password



Password Changed!

Your password has been changed
successfully.

[Back to Login](#)

Change Your Password

Enter a new password below to change your password.

New password

.....



Re-enter new password

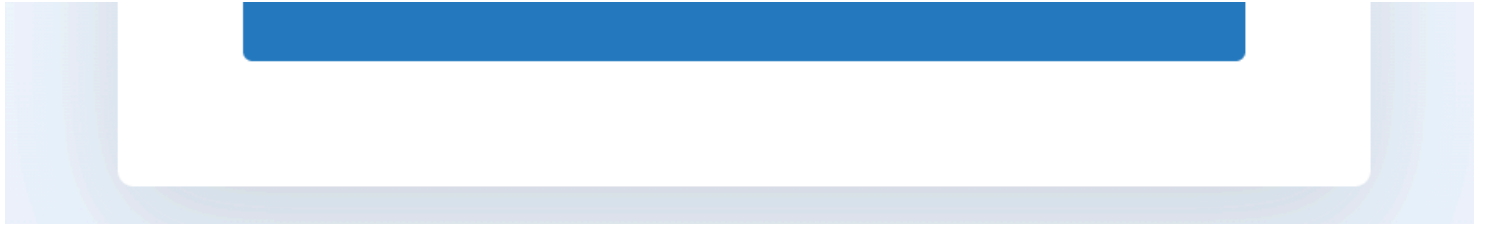
.....



Your password must contain:

- ✓ At least 8 characters
- ✓ At least 3 of the following:
 - ✓ Lower case letters (a-z)
 - ☐ Upper case letters (A-Z)
 - ✓ Numbers (0-9)
 - ✓ Special characters (ex. !@#\$%^&*)

SAVE

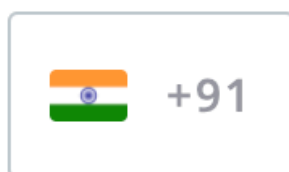


Once you save the password you can go back to the login page and use this new password for the login

Reset Password with Phone Number

Reset your password

☐ Email ID ☒ Phone No.



Phone No. _____



CONTINUE

i Currently, resetting password with phone number is supported for Indian user only.

[Forgot email?](#)

[Back to Login](#)

Need help? Email us at hello@exotel.com

Enter your registered and verified phone number to reset your password



Password Changed!

Your password has been changed successfully.

[Back to Login](#)

If the entered phone number is registered and verified with us, we will send you an OTP via SMS to verify your identity

We have sent you an OTP, if not received please check/edit entered phone number for typing error. If the issue still persists contact hello@exotel.com



Verify OTP

Please enter the OTP sent by SMS to
+9108047182701 [Edit](#)

VERIFY

Resend OTP by [SMS](#) [CALL](#)

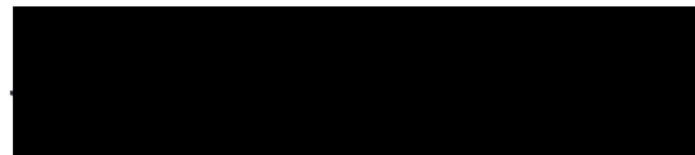
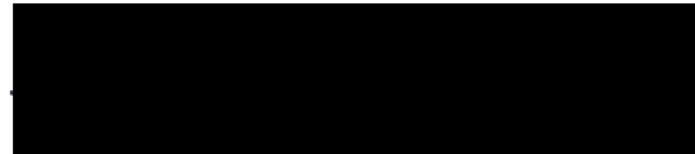
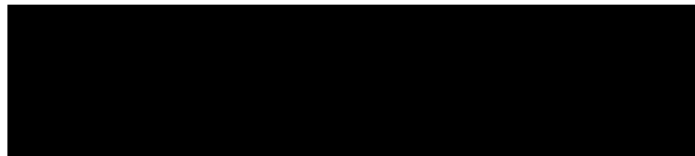
If you are using a Landline number, you would need to wait for the OTP SMS to expire post and you will get an option to receive OTP via call.



Verified Successfully!



Choose Your Account



[Back to Login](#)

Need help? Email us at hello@exotel.com

If you have entered the correct OTP on the OTP screen, your identity will be verified and you will see a list of accounts linked to your phone number

Click on the account for which you want to reset the password

Change Your Password

Enter a new password below to change your password.





SAVE

[Back to Login](#)

Need help? Email us at hello@exotel.com

Once you selected the account, it will ask you to create a new password



Password Changed!

Your password has been changed
successfully.

[Back to Login](#)

Change Your Password

Enter a new password below to change your password.

New password

.....

👁

Re-enter new password

.....|

👁

Your password must contain:

- ✓ At least 8 characters
- ✓ At least 3 of the following:
 - ✓ Lower case letters (a-z)
 - ☐ Upper case letters (A-Z)
 - ✓ Numbers (0-9)
 - ✓ Special characters (ex. !@#\$%^&*)

SAVE

Create a strong password for your account, and make sure you fulfill all the asked requirements for the password

Once you save your password you can go back to the login page and use this new password for the login

Recovering Your Email ID

If you cannot remember the email ID linked to your account, you can recover it using your registered phone number.

Recovery via Phone Number

1. Click the **Forgot Email** link on the login page.
2. Enter your registered and verified phone number.
3. If valid, you will receive an OTP to verify your identity.
4. Enter the OTP on the verification screen.
5. You'll see a list of accounts linked to your phone number.
6. Select the email ID you want to use.
7. You'll be redirected to the login page with the email pre-filled.

Issues with OTP Delivery

If you are not receiving OTPs:

- **For SMS:** Ensure your mobile plan and device support SMS delivery. Delivery speed may vary by provider and location. If SMS is slow, try the call option.
- **For Calls:** Ensure your plan and device support incoming calls. Call delivery may vary by provider and location.

Troubleshooting Password Reset

You may face issues resetting your password in the following scenarios:

- **Not a registered user:** If the entered email or phone number does not exist in the system, no reset link or OTP will be sent.
- **Phone number not verified:** If your phone number isn't verified, you won't receive OTPs. Verify your number by giving a missed call to **09513885656** or any number listed in your account.
- **Too many attempts:** Multiple failed reset attempts temporarily disable password recovery via email or SMS. The option will reappear the next day.

Always ensure your phone number is verified in Exotel to avoid issues with recovery.

9.1.9. Reactivate Account

Even if your account is inactive, your login details remain valid. You can still sign in using your registered email address and password. If you cannot remember your password, follow the steps in this guide to reset it:

[Change or reset your password](#)

You will be able to log in and view your account information. However, you cannot use account features until reactivation.

To fully reactivate your account and restore functionality, you must complete a payment.

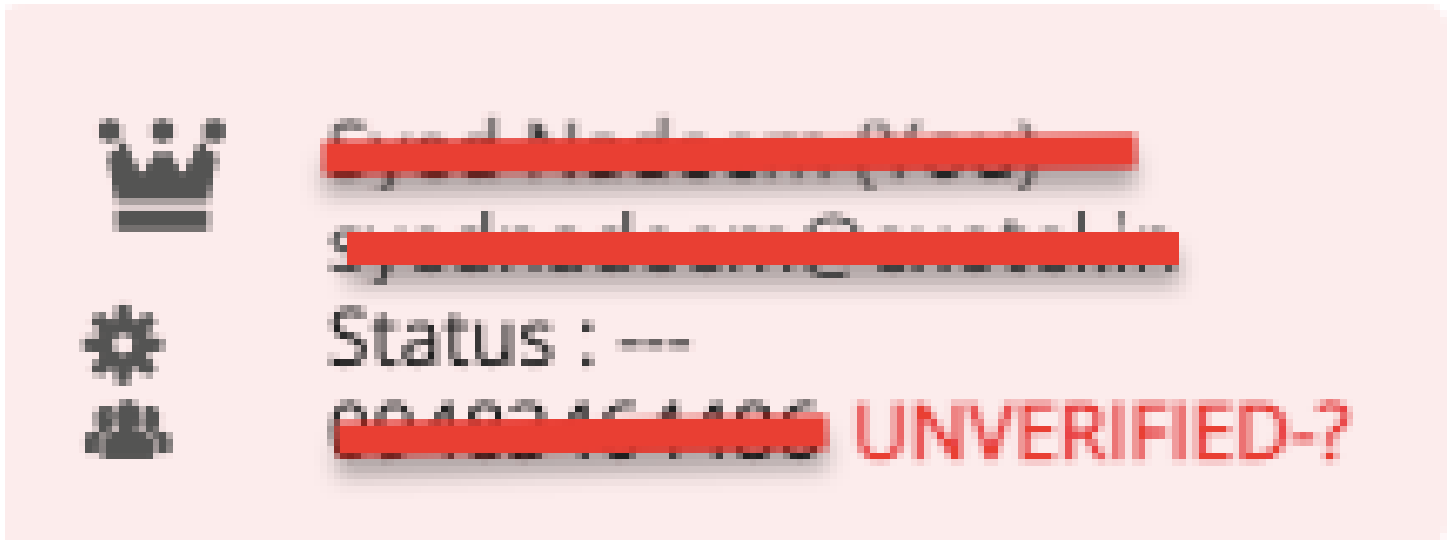
[Learn how to make Payments](#)

9.1.10. Verify Number

Every new number that you add to your Exotel account needs to be verified that it actually belongs to you!

We remind you about this in a few places. Whenever an unverified user logs into their account, they will notice a popup that will have all the information they need to verify their number.

This annoying popup will disappear immediately after verification! In case you missed this, you can go to the Co-workers and groups page and click on "UNVERIFIED" right next to your name and you will see this popup again!



Verify Your Number

Before you can start using Exotel, you need to verify your personal number. To verify your number, please give **missedcall** to 09513885656 or any of the numbers listed [here](#).

Close

These popups will talk about the following two ways of verifying your number:

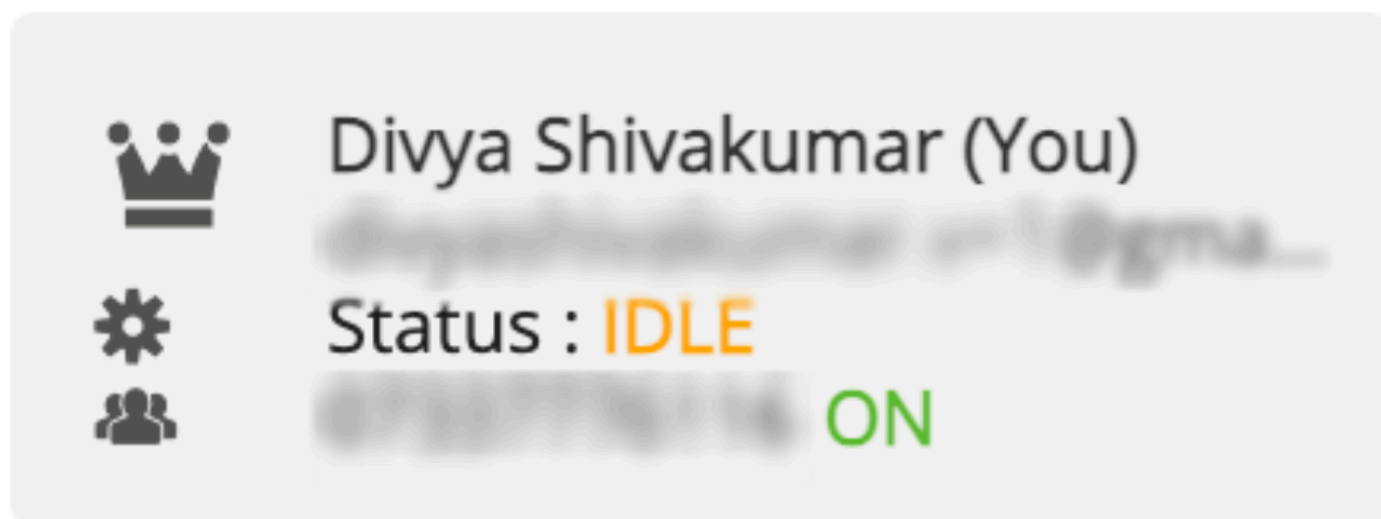
Give a missed call

Give a missed call from the number that is registered with Exotel. The phone number displayed next to the "UNVERIFIED" note is your number registered with Exotel. Once you give a missed call, the UNVERIFIED sign will go away and you can start using Exotel right away. To trigger a missed call, your number should have outgoing enabled. Also, such a missed call is ideally free as it is not picked up by Exotel (however, it may vary based on your carrier plan).

Any one of the following numbers can be dialed for verifying the number:

Country	Verification Numbers
India	+91-9513885656(SGP stamp)/02249360005(Mum stamp)
Singapore	+65-69515390
Malaysia	+60-327712777
Indonesia	+62-2127899620 +62-2150984014
Thailand	+66-24915001
Australia	+61-283171143
United States of America	+1-7182858941
United Arab Emirates	+971-45405858

Please note that once you call the verification number, Exotel will disconnect the call after two or three rings. However, if it doesn't disconnect automatically, you can choose to disconnect the call yourself after it rings and your number should be verified after this.



Once the number is verified your number should look something like shown in the picture above.

9.2. Exotel's VoIP Softphone

Overview

Unlock the power of voice communication with **Exotel's VoIP SoftPhone**.

Experience seamless and crystal-clear voice communication with Exotel's cutting-edge VoIP SoftPhone, designed to enhance your calling experience. It supports both inbound and outbound (click-to-call) functionality, and you can also dial a number manually.

By following these steps, you can effortlessly enhance your Exotel Dashboard experience—leveraging **IP-PSTN intermix** for powerful and flexible communication.

Your end customers won't notice any change; they'll continue to make and receive calls on their regular PSTN devices (e.g., mobile phones).

Benefits of IP-PSTN Intermix

1. UI Widget for Calling

The widget for incoming and outgoing calls appears on the dashboard, showing options to accept or reject calls, along with **hold** and **mute** buttons.

2. Switch Between IP and PSTN Devices

Users can toggle between IP and PSTN calling modes based on their network availability using a simple **toggle button**.

3. On-Call Status, Callbacks & Call Details

All call details are displayed post-call for easy review and analysis.

4. Mobility and Flexibility

With IP-PSTN intermix, users can make and receive calls from anywhere with an internet connection—ideal for remote or distributed teams.

5. Business Continuity

In the event of outages or disruptions, IP-PSTN intermix ensures reliable backup connectivity.

Onboarding Process

Follow these steps to enable and configure IP-PSTN VoIP calling on your account.

Prerequisites

To enable IP-PSTN, you must complete the following steps:

1. New Services Agreement

To comply with Indian telecom regulations, Exotel's VoIP services are operated under **Veeno Communications Pvt. Ltd.**, which holds a Unified License for Virtual Network Operation (UL-VNO).

A new **Services Agreement** must be signed with Veeno Communications Pvt. Ltd. Your Exotel Account Manager or point of contact will assist with this process.

2. New Account Creation (Even for Existing Customers)

Due to regulatory requirements, you'll need a **new account** under the Veeno entity to use VoIP calling. Existing Exotel Techcom accounts cannot host VoIP services.

Your Account Manager will help create this account.

3. New KYC Registration (*Bangalore, Mumbai, Hyderabad only*)

In addition to the four standard KYC documents, VoIP accounts require an extra **Customer Acquisition Form (CAF)**.

The CAF is supported directly in the Exotel Dashboard under **KYC → Document Upload**.

KYC must be completed separately for each city.

The following documents must be re-submitted for each new city:

- Address proof (for the city from where numbers are to be purchased)
- Customer Acquisition Form (CAF)

For document upload instructions and KYC guidelines, refer to this article:

<https://support.exotel.com/support/solutions/articles/35760>

4. Purchase New Exophones (Virtual Numbers)

Virtual numbers can only be purchased in regions where KYC is complete.

Currently, KYC and number purchase are available only for **Bangalore**.

For details on procuring Exophones, refer to:

<https://support.exotel.com/support/solutions/articles/3000010956>

5. Call Flow Creation or Migration

After the new account and virtual numbers are ready, create new call flows for inbound scenarios.

- Reference: [How to Create or Edit a Call Flow](#)

If you want to reuse existing call flows, they must be migrated.

- Reference: [Transfer Call Flows Between Accounts](#)

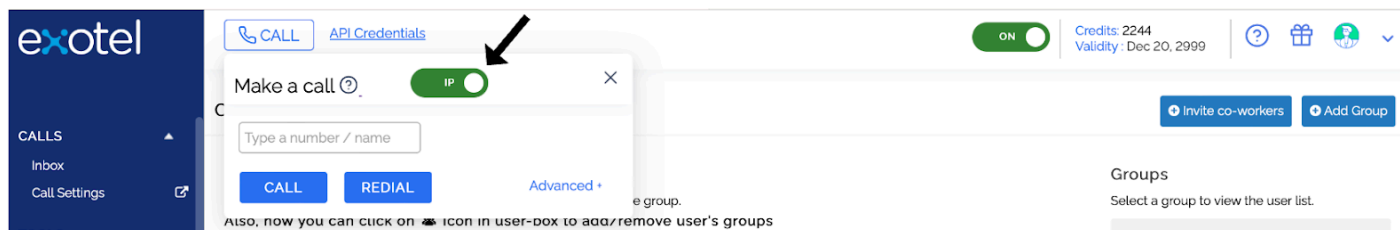
Once created or migrated, link the virtual numbers to their respective call flows so that customer calls follow the correct routing path.

Using IP-PSTN on the Exotel Dashboard

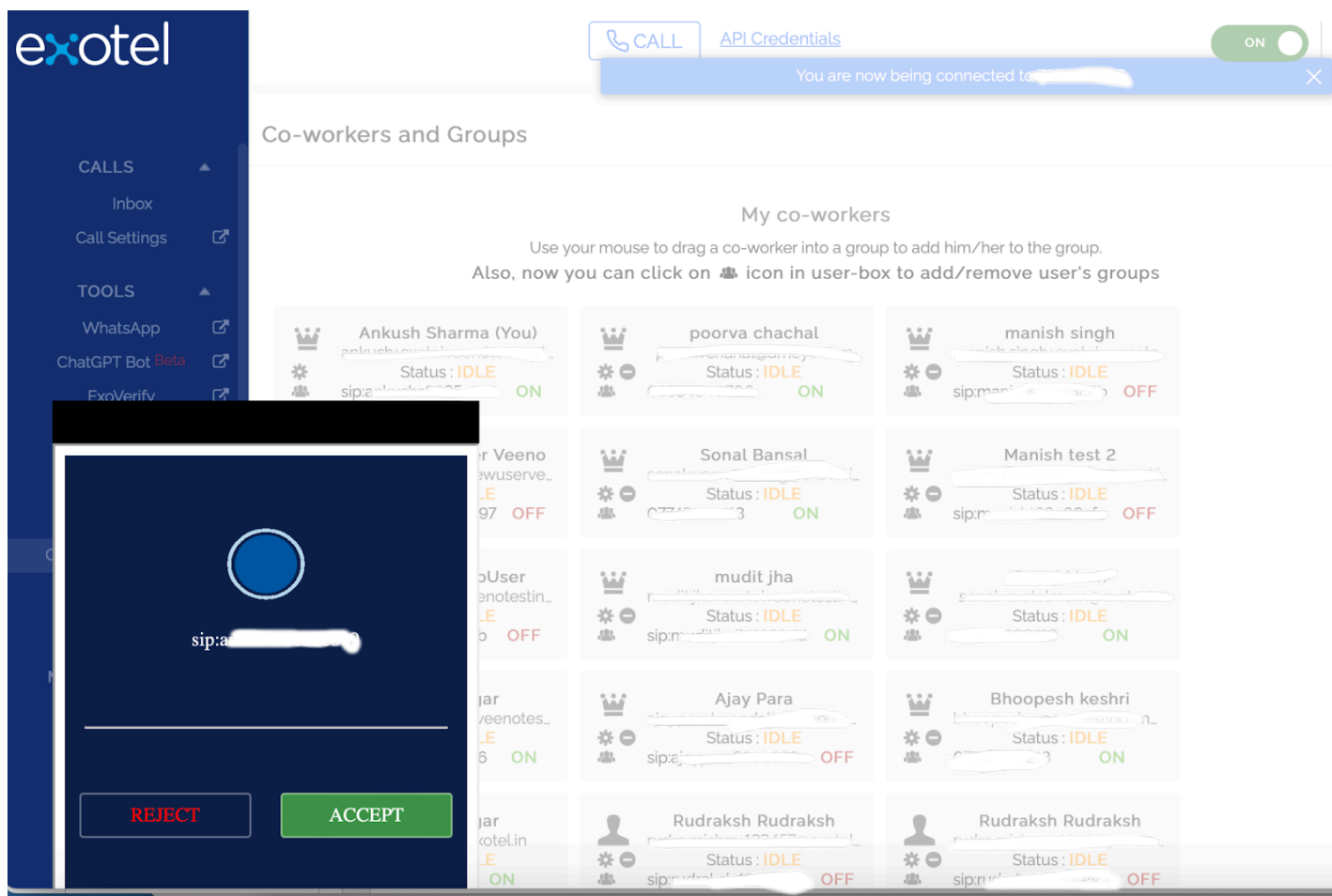
1. Log in to your Exotel Dashboard and confirm your PSTN device to enable both IP-PSTN and PSTN-PSTN calling.
2. Activate yourself by toggling the **VoIP switch** as shown below:

The screenshot shows the Exotel Dashboard interface. On the left is a dark blue sidebar with navigation links: CALLS (Inbox, Call Settings), TOOLS (WhatsApp, ChatGPT Bot Beta, ExoVerify, Campaigns), and MANAGE (Address book). The main content area has a top bar with a 'CALL' button, 'API Credentials' link, and a green 'ON' toggle switch for VoIP, which is highlighted by a black arrow. To the right of the toggle are 'Credits: 2244' and 'Validity: Dec 20, 2999'. Below the top bar, the 'Co-workers and Groups' section is visible, featuring a 'My co-workers' list with user status (IDLE, ON, OFF) and a 'Groups' section with 'Sales' and 'Support' groups. Buttons for 'Invite co-workers' and 'Add Group' are in the top right of the main content area.

3. To make a call, click the **Call** button. You can switch between **IP** and **PSTN** calling modes as required.

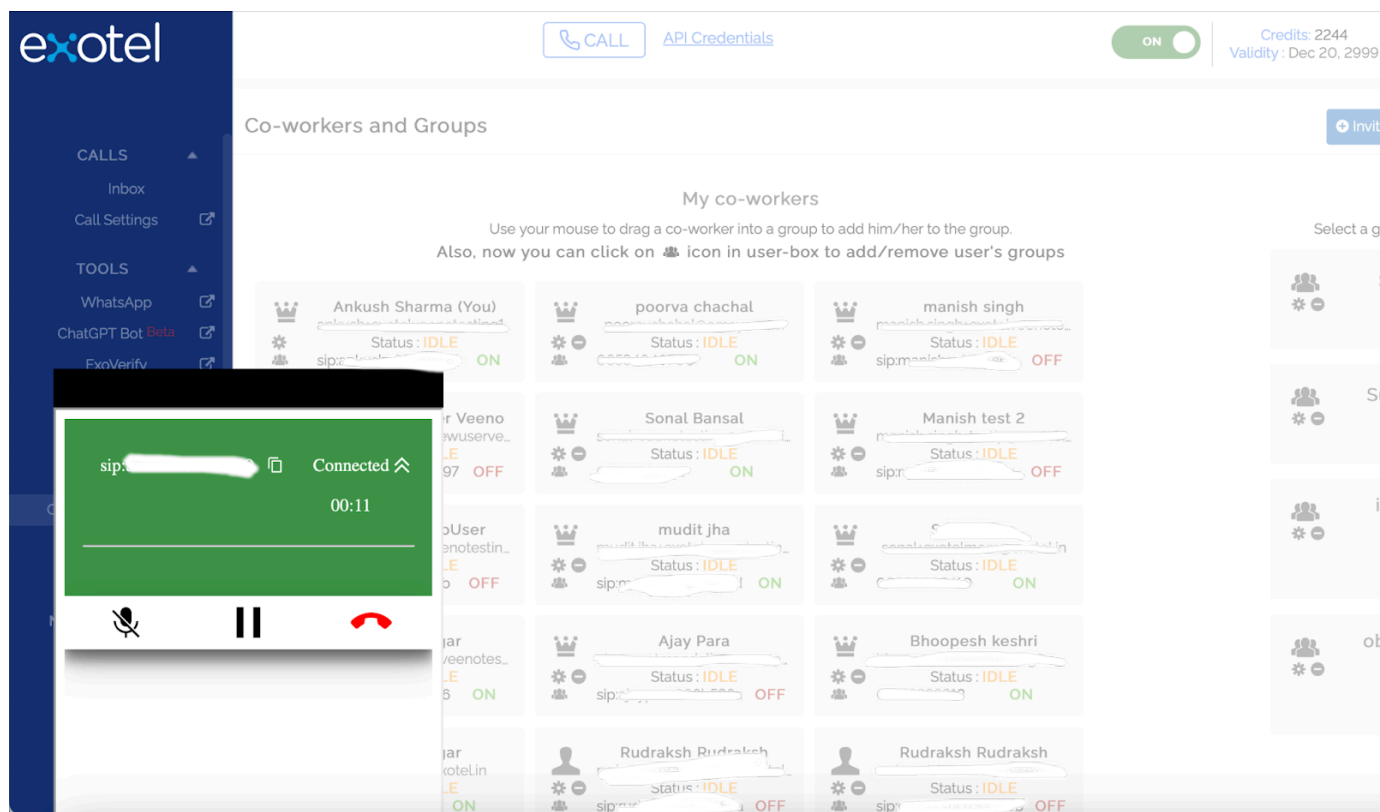


4. When the IP toggle is enabled, enter a number or name in the “Type a Number/Name” field and click **Call**.
The first leg of the call will ring on your web browser.



5. After accepting the call, you'll see options to manage it:

- **Mute:** Mutes your microphone.
- **Hold:** Places the call on hold.
- **Disconnect:** Ends the call.



6. Recordings and call details are available in the **Inbox**.

7. PSTN calls remain unchanged – continue using them as usual.

8. When making an **IP-PSTN Intermix call** with multiple browser tabs open:

- The call pop-up appears in all tabs.
- After accepting, the pop-up remains only in the active tab.
- The active tab is locked for call duration; other tabs remain usable.

9. Enable Auto Answer:

When enabled, all incoming VoIP calls for agents are automatically answered on the Exotel Dashboard.

(This does not apply to CRM dashboards like SFDC, LSQ, etc.)

This setting is **OFF by default** and can be managed by all admins.

MY ACCOUNT ▲

Personal Info

Impersonation

Company Info

KYC Docs

Personalization

Notifications

Heartbeat

Access Control

CALL SETTINGS ▲

Audio Library

VOIP

Whitelist Numbers

SMS SETTINGS ▲

SMS Templates

Sender ID

VOIP Settings

VOIP Calling Status for Account	ACTIVE
PSTN-VOIP Intermixing State	ON
User VOIP Call Routing Enabled	ON
VOIP Domain Address	exotel1810.voip.exotel.com
VOIP Proxy Address	voip.exotel.com:443
VOIP Username	chirags7a3aae81
VOIP Password	Reset Password
Auto Answering Incoming Calls ?	ON

Automatically answers all incoming VoIP calls on the Exotel dashboard

Please refer to the [manual](#) for login

For details, refer to [FAQs](#).

Pricing

IP-PSTN intermixing is available only with the **Unlimited Calling Plan** on a fixed per-user, per-month basis. Contact your Exotel Account Manager to understand pricing details for your organization.

FAQs

1. Do I need to sign a new MSA for VoIP calling?

Yes. Exotel's VoIP services operate under *Veeno Communications Pvt. Ltd.* (holder of the Pan-India UL VNO license). Hence, a new MSA must be signed between your organization and Veeno.

2. Do I need a new account for VoIP calling?

Yes. All customers—including existing ones—must create a new Veeno account. Existing Exotel Techcom accounts cannot host VoIP services due to regulatory restrictions.

3. How do I create an account under Veeno?

During the alpha phase, account creation is assisted by the Exotel Account Management team. Post-alpha, it will follow the standard onboarding process for new customers.

4. Can I use my existing virtual numbers (Exophones) for VoIP?

No. New numbers must be purchased under the Veeno account. Existing numbers from non-Veeno accounts cannot be reused.

5. Can I migrate existing IVRs or call flows?

Yes. The Exotel team will assist in migrating IVRs and call flows from your existing account to the new Veeno account.

6. What are the prerequisites for starting VoIP calling?

Users must log in with valid credentials. Once logged in, the SIP device will appear active and can be toggled on or off.

7. How can I stop making or receiving VoIP calls?

Toggle off the **SIP Calling** button in the dashboard.

8. What if VoIP calls fail due to poor network connectivity?

You can switch to PSTN calling using the toggle. Your mobile device will act as the primary calling device.

9. How reliable is IP-PSTN compared to traditional networks?

IP-PSTN offers high-quality voice and reliability, though it depends on internet stability and network conditions.

10. What happens if I refresh the dashboard during an active call?

Refreshing will prompt a confirmation. If you proceed, the ongoing call will disconnect. Avoid refreshing while calls are active.

Note: This feature is currently under **Beta**.

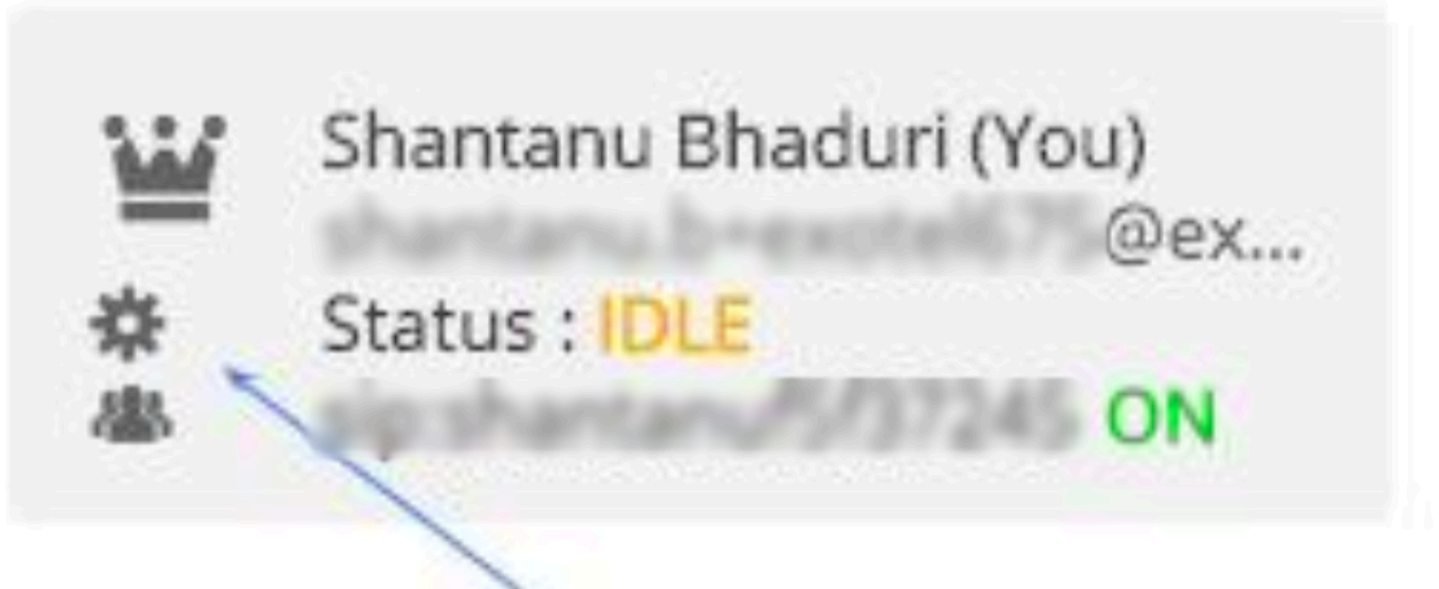
Contact us

For questions or support, write to hello@exotel.in.

9.2.1. FAQs: VOIP

How can an agent choose to receive calls on SIP Softphone or mobile device?

Agents can select between a SIP softphone or a mobile device in the agent edit settings window.



On clicking on the Setting button, it will open a popup window like shown below

Edit user details

First Name

Shantanu

Last Name

Bhaduri

Email

shantanu.bhaduri@exotel.in

Device Type

☐ Number ☒ SIP

This person will be called based on the device type - Number (PSTN) or SIP client.

SIP User Name

sip.shantanu@9977245

When a call is routed to this person, this is the number that will be called.

ON

NOTE:

- 1) You will be charged per user based on your User Billplan
Your current User Billplan : zero charges per month
- 2) To verify your number,
 - a) Please give **missedcall** from newly added number to 09513885656
 - b) Get a **verification call** from Exotel

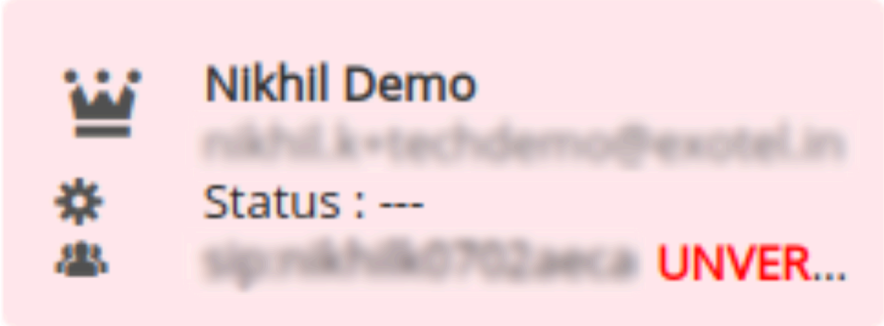
Cancel

OK

In this pop-up agent can choose to toggle between Number and SIP and appropriately calls will get routed to the agent chosen device

How to identify if my SIP device is registered to the Exotel platform and ready to receive calls?

The agent can verify its registration state on its agent card. Below are the different states of the agent card

Status	Description
 Nikhil Demo nikhil.k+techdemo@exotel.in Status : --- sip:nikhilk0702aeca UNVER...	Agent created in Exotel but has not verified its device since creation.
 Nikhil Demo nikhil.k+techdemo@exotel.in Status : IDLE sip:nikhilk0702aeca OFF	Agent has verified the device but the SIP device , but the device is not registered to Exotel Platform.
 Nikhil Demo nikhil.k+techdemo@exotel.in Status : IDLE sip:nikhilk0702aeca ON	Agent SIP device is successfully registered to Exotel Platform
 Nikhil Demo nikhil.k+techdemo@exotel.in Status : --- sip:nikhilk0702aeca OFF	Agent has turned-off its availability status for receiving calls.

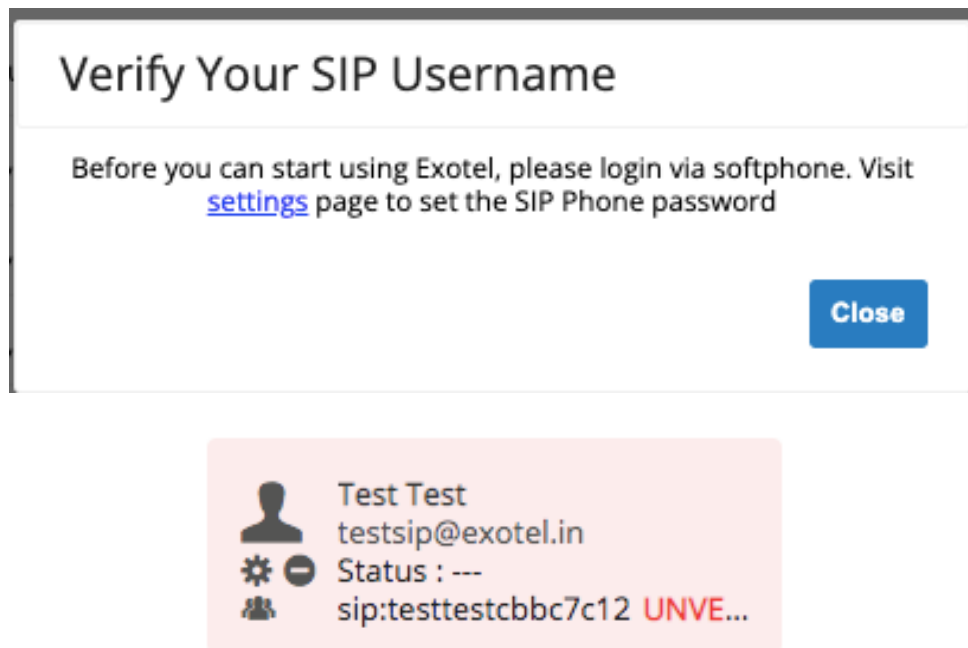
3. Can an agent receive calls on both their PSTN and SIP devices?

An agent may have two devices but only one of them will be active at a time to receive a call. The device selection can be changed in the agent edit window. The change will take effect only from the next call.

9.2.2. Unverified SIP Username - How to verify ?

Once you've added the new user (Admin or User Profile) to your Exotel account, the user needs to be verified to get activated. Whenever an unverified user logs into their account, they will get a popup that will have all the information they need to verify their number. This annoying popup will disappear immediately after verification!

In case you missed this, you can go to the Co-workers and groups page and click on "UNVERIFIED" right next to your sip username and you will see this popup again!



Once you click on this popup(<https://my.exotel.com/voipinfo>), it will take you to the VOIP settings page. Please follow the below instruction to get the username verified

1. Set a password for your SIP Username
2. Download the SIP softclient of your choice
3. Use the credentials for SIP as provided on the settings page
 1. Username
 2. Domain name
 3. Proxy name
4. Register with the softclient using these credentials and passwords set by you. Please ensure to use TLS as a mode of communication
5. Once the registration is successful, the unverified message will go away and will show the current status of your SIP device

The details will look something like this.

VOIP Settings

VOIP Calling Status for Account	ACTIVE
PSTN-VOIP Intermixing State	ON
User VOIP Call Routing Enabled	ON
VOIP Domain Address	[REDACTED]
VOIP Proxy Address	[REDACTED]
VOIP Username	[REDACTED]
VOIP Password	<button>Set Password</button>

Please refer to the [manual](#) for login instruction via softphone. For details refer [FAQs](#)

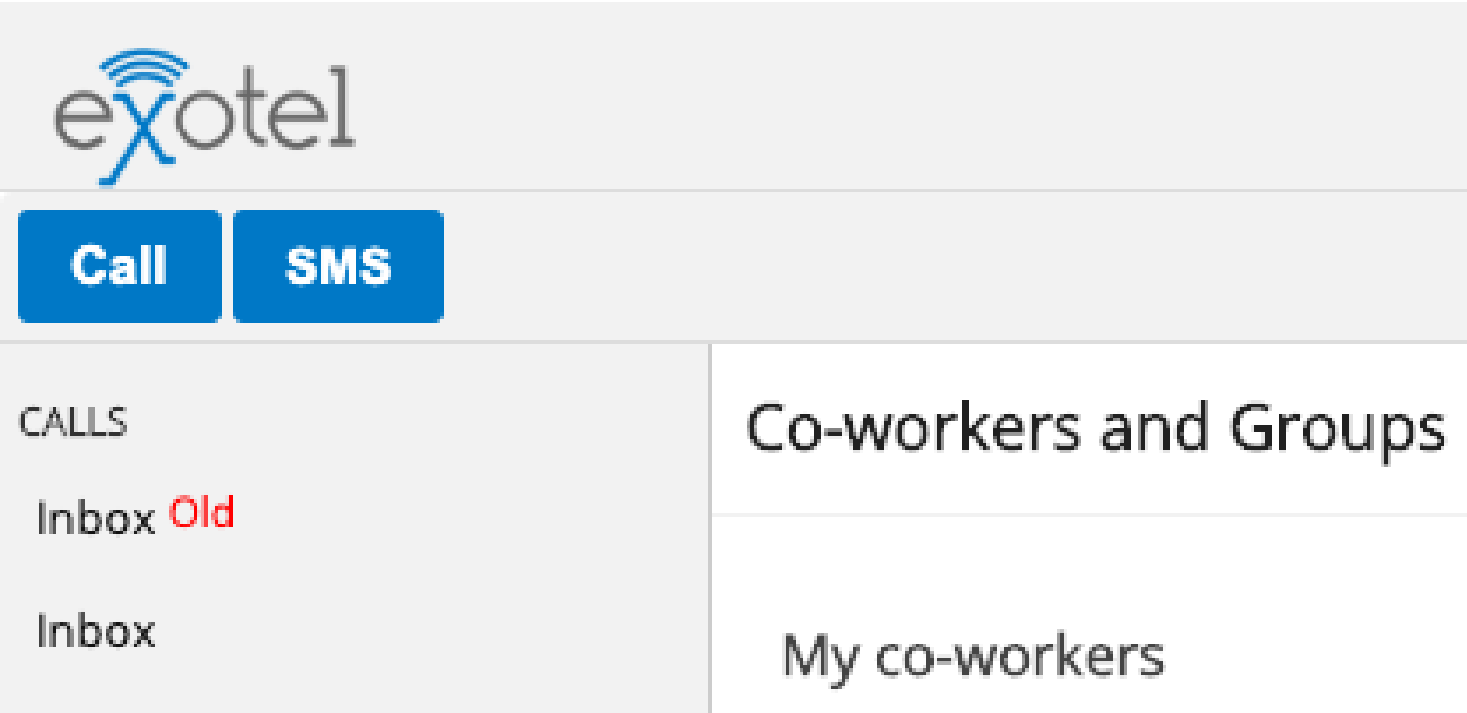
Related Articles

[Exotel's VoIP Softphone](#)

[FAQs: VOIP](#)

9.3. Send SMS

- 1. Log into your Exotel account
- 2. Click on the 'SMS' button on the top left



- 3. Enter the number to which you want to send the SMS

Call

SMS

CALLS

Inbox Old

Inbox

SMS

Outbox

TOOLS

Campaigns

CONTACTS

Address b

Co-work

ADMIN

App Baza

ExoPhone

SMS Cont

Send a text message

From

+911130018020 (LM-EXOTEL) 

To

098456793** 

Enter up to 10 numbers separated by comma

Type your message or [Choose a SMS Template](#)

Enter your message

0/1000, 0 SMS 

Send SMS

4. Enter your message content OR

5. Optionally choose an SMS template What is an sms template and how can i get it approved? If there are placeholders(%d and %s) in your template replace them with actual numbers and text respectively.

Call

SMS

CALLS

Inbox Old

Inbox

SMS

Outbox

TOOLS

Campaigns

CONTACTS

Address Book

Co-workers

ADMIN

App Bazaar

ExoPhone

SMS Content

Send a text message ?

From

+918046809421 (LM-EXOTEL)

To

1234567890

Enter up to 10 numbers separated by comma

Type your message or [Choose a SMS Template](#)

Let us know what you think of our support team by giving a free missed call. Love them - 07967773641 Like them - 07967773642 Dislike them - 07967773643.

152/1000, 1 SMS

Note: This message will be sent as 'transactional' [See why](#)

Send SMS

6) Click send SMS. That's it!

Note: TRAI has now made it mandatory for any Indian Entities communicating to their customers via SMS must be registered in one of the DLT portals. For detailed information visit here: [TRAI Regulations on Commercial Communications \(DLT portal\) - SMS in India](#)

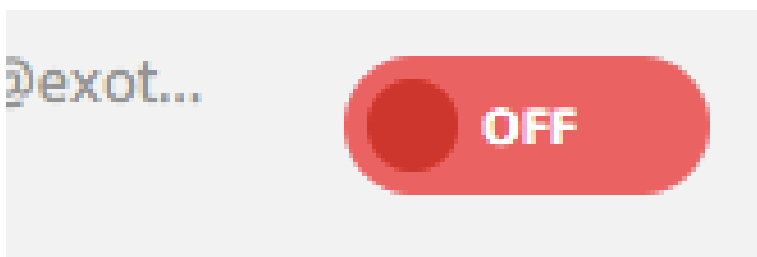
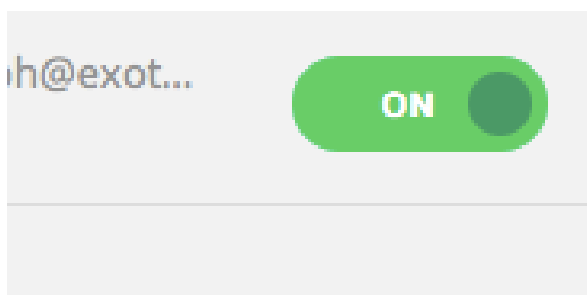
9.4. Toggle Phone Number On & Off

If you do not want to receive your Exotel calls, you can switch your number "OFF". So, calls coming to you through Exotel will go to someone else or voicemail depending on the configuration of the call flow. You might choose to do this when you are getting into a meeting, driving a vehicle, or simply out of the office, etc.

There are three ways of toggling your device (phone number):

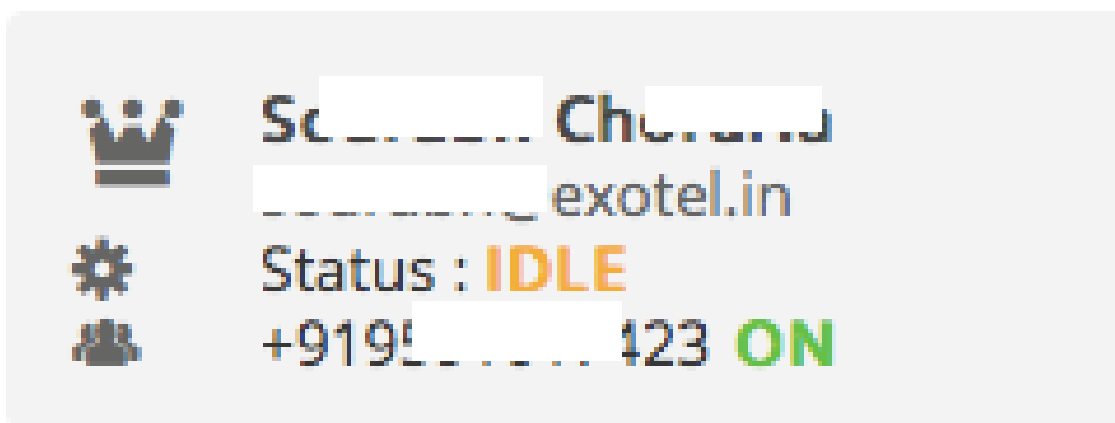
Toggle From the Top Navigation Bar

From your Exotel dashboard after logging in like this, this option will be on your top right corner:



Toggle from Co-workers & Groups

Second - From the Co-workers & Groups page by using the "Gear" icon below the User widget



and-line Number

423



is routed to this person, this is the number that will be called.

Toggle with Exotel Switch

By using the "Exotel Switch": Exotel Switch is +919513885656. You can give a missed call from your registered phone number to this switch and it will toggle your status. That is: If your number is currently ON, it will go OFF and vice versa. You will get an SMS with the current status of your device.

Note: If you are in the **Mumbai cluster, the Exotel Switch is 02249360005**. You can give a missed call from your registered phone to alter your device status. How do we know we are in the Mumbai cluster? If my account sid is preceded with a numeric value and ending with an "m". For example: exotel1m, exotel2m, exotel3m etc.

Troubleshooting Dashboard Errors

If you are in a scenario where you are unable to make or receive calls, you can solve this by turning your Exotel device 'off' and then switching it 'on' again. This will reset your agent state from 'active' to 'idle'. You can do this from the dashboard or by giving a missed call to our switch number (+91 9513885656), using any of the toggle methods described above.



Here are some situations when you can make use of steps to avoid call issues:

1. Outgoing Call Scenario

If you receive the following error, suggesting that you are already on a call, your device is busy, or an Unknown error occurred:

Error Occurred

An unknown error occurred. Please
contact Exotel at hello@exotel.in.
Unable to complete request:
[https://my.in.exotel.com//addressbook
/search?
query=ODE0MjY1MDAwNw&_=17495273
27692](https://my.in.exotel.com//addressbook/search?query=ODE0MjY1MDAwNw&_=1749527327692)

OK

Error Occurred

Unable to complete call. Invalid call parameters specified

OK

Error Occurred

Unable to complete call. Curl failed with
Error: 404: HTTP/1.1 404 Not Found
Response:

```
{"request_id":"2e9e561cc27a497c9e3a27  
be004f051b","method":"POST","http_cod  
e":404,"metadata":null,"response":  
{"code":404,"error_data":  
{"code":10706,"description":"User device  
is currently busy","message":"Not  
Found"},"status":"failure","call_details":null  
}}
```

OK

Error Occurred

Unable to complete call. Looks like you are already on a call or expecting one soon. Please wait and retry after sometime.

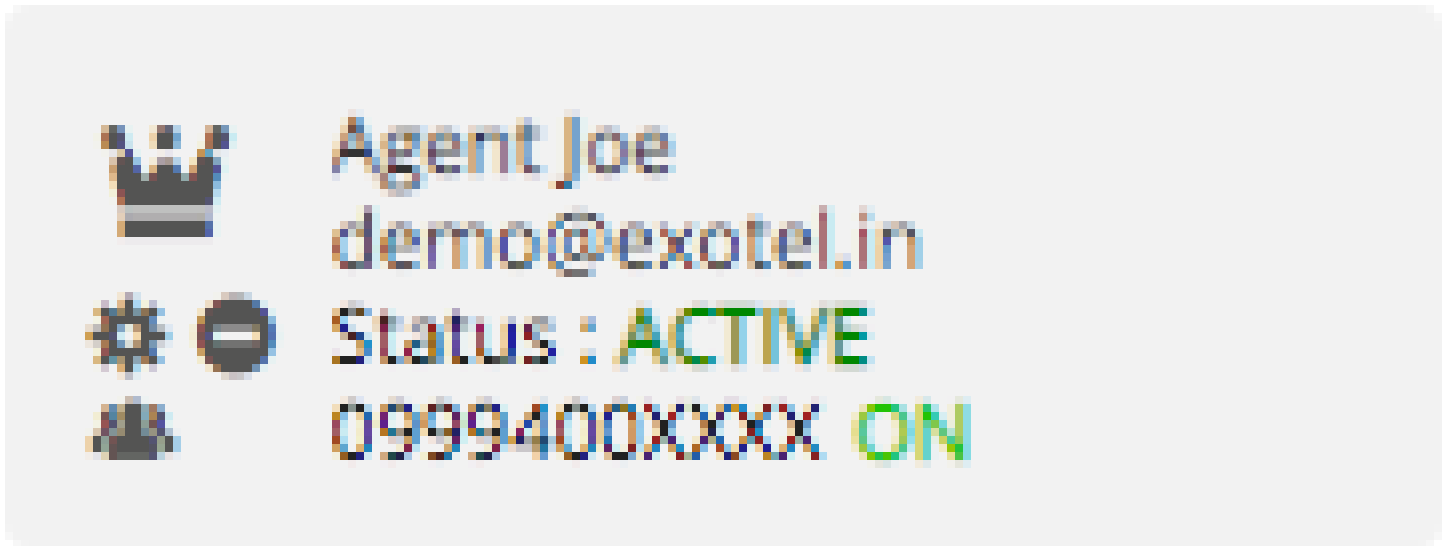
Ok

This means that the previous call was not terminated correctly, or multiple attempts to dial occurred within a short span by repeatedly clicking the "Click to Call" option. To resolve this issue, follow these steps:

- Avoid clicking the **"Click to Call"** button multiple times.
- Clear your browser's **cache and history**.
- Toggle the call button **on and off** (as mentioned earlier).
- Ensure your **network connection** is stable.
- Try initiating a **fresh call**.

2. Incoming Call Scenario

If you are part of a group and you are not receiving incoming calls, you can check your state from the Co-workers & Groups page. If it appears to be 'active' and you are not on a call, you can use this functionality to reset your state.



3. Incoming Call Scenario (Handset issue)

If you are part of a group and you are not receiving incoming calls on your device and on the Exotel dashboard status shows as busy or no-answer, we request you to please reset the network by restarting the device.

Additional Error

Error Occurred

Unable to complete call. Curl failed with Error: 401: HTTP/1.1 401 Unauthorized Response:

```
{"request_id":"fad6ed4b63d64ffeaf1b05802b492c1a","method":"POST","http_code":401,"metadata":null,"response":{"code":401,"error_data":{"code":1010,"description":"bearer token is not found","message":"Authentication failed"},"status":"failure","call_details":null}}
```



Please follow the steps mentioned under point one to resolve the above error.

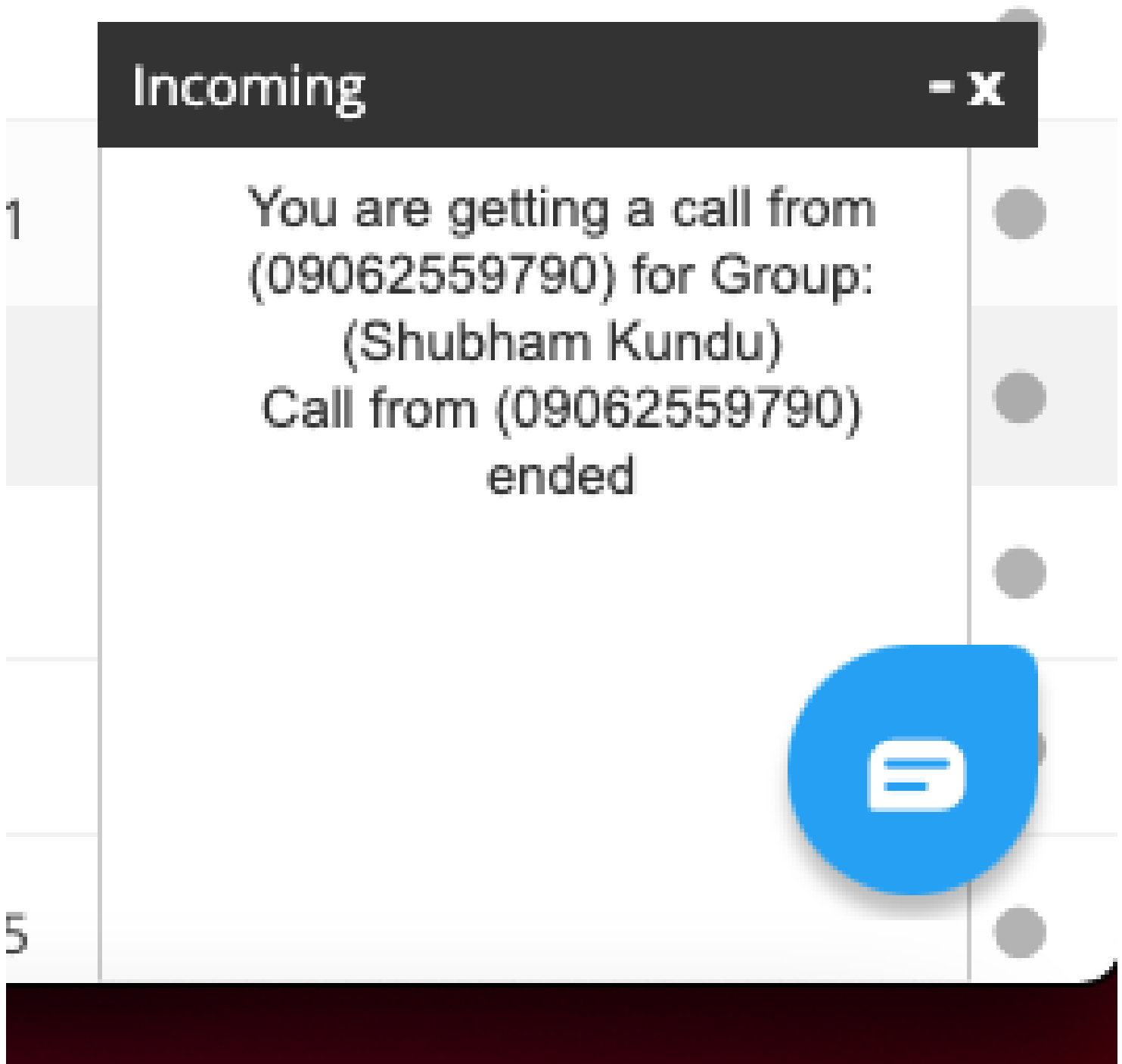
Note: We try to eliminate all possible scenarios where an agent can be stuck making or receiving calls. However, due to the complexity of the infrastructure and telecom network, there might be certain scenarios where you can still encounter this problem. However, you can use this method to set yourself free.

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

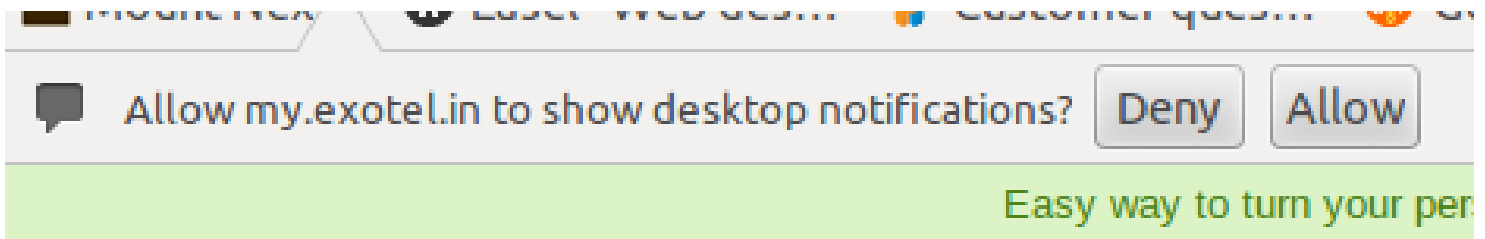
94.1. Enabling Desktop notifications

If you use the Chrome browser, you could enable desktop notifications for your Exotel calls.

1. log in to Exotel. The next time you get a call, you will see a popup like this:



2. Click on the "Get Desktop Notifications?" link in that popup. Chrome will ask you if you wanna "Allow" Exotel to notify you through its desktop notification framework like this:

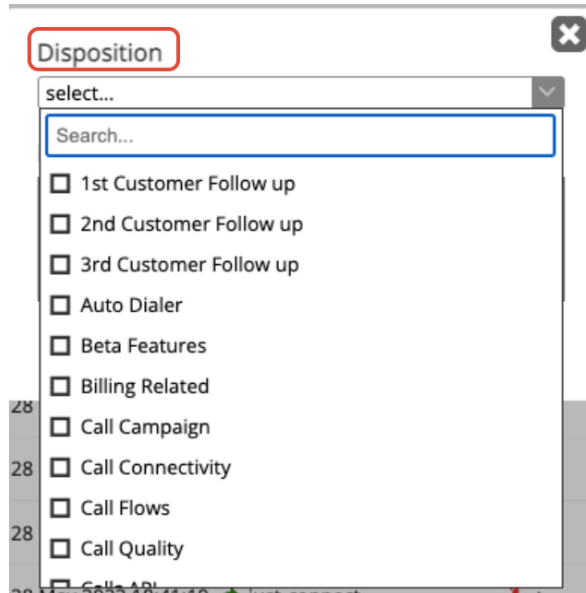


3. And that is it. Now whenever you get a call, irrespective of which window you are on, you will always be alerted.

9.5. Call Dispositions

Your team can classify calls using dispositions. You can ask us to turn this feature on even though it is not enabled by default. The list of dispositions you want us to activate is all we really require. After each incoming and outgoing call, a disposition pop-up will appear.

The information on the selected disposition for each call will be displayed on the dashboard. Dispositions appear like this on your dashboard.



9.6. Call Notes

Yes! You could use the "Private Notes" section to add comments about the call that you just took.

1. Click on Inbox
2. Click on any of the calls

YOU ARE IMPERSONATING! Be careful about what you do while you are here

☐ Select	Delete	Refresh	25	Search by call parameter, e.g. agent name, number, etc.	Search
☐		6 mins ago			
☐		8 mins ago			
☐		48 mins ago		ABC (Routing/Customer)	00:00:30
☐		an hour ago		ABC (Routing/Customer)	00:00:27
☐		about 13 hours ago		ABC (Routing/Customer)	00:01:44
☐		about 13 hours ago		ABC (Routing/Customer)	00:02:43
☐		about 14 hours ago		ABC (Routing/Customer)	00:03:30
☐		about 15 hours ago			
☐		about 16 hours ago			
☐		about 16 hours ago			
☐		about 16 hours ago		ABC (Routing/Customer)	00:00:39
☐		about 16 hours ago		ABC (Routing/Customer)	00:01:42

3. You can add your notes in the Privates notes section and click on notes.

Validity : May 26, 2021

Assigned To
None
Status
Open
Delete

From : completed
To : completed
Through :

0:00 / 0:29

Call Reference Id:
Total Talk Time: 30s
Call Time: Fri, 26 Mar 2021 09:52:31

Start Time: Fri, 26 Mar 2021 09:52:31
End Time: Fri, 26 Mar 2021 09:53:26

Transcription:
[Existing Customer] Incoming Call
Here is what happened:
[Existing Customer] Incoming Call The number received a call from at Fri, 26 Mar 2021 09:52:32 The call was routed to the following members of the group 'Existing Customer' who picked up the call

Private Notes

+ Add Notes

And when you enter comments & "Add Note", It looks like this:

Mohammed Saif
2021-11-22 12:45:54

Test note

Please note that the notes entered in the Private notes section can only be viewed but cannot be downloaded for now.

9.7. Exotel as a CRM

Many Indian businesses receive a majority of their leads & support requests through phone calls rather than emails. So, wouldn't it be cool if Exotel can also double up as a [CRM](#)?

Actually, no. There are a number of excellent CRM options available out there, so it does not make sense to try to force a CRM into Exotel. Also, we continue to provide a number of ways to integrate Exotel into your CRM. But, what if you don't need to, are not interested in or do not want to pay additionally for a CRM?

There are a number of handy & helpful new search options available with our upgraded search ([Call Inbox Advanced Search](#)). Particularly of interest to us are the calls that we missed. So, by searching for the 'Call Type' we require, we get a list of all such calls.

Search by call parameter, e.g. agent name, number, etc.

Search

X

Call time period

All▼

ExoPhone

Select your option...▼

Call Direction

All▼

Call Type

Select your option...▼

☐ Callback(S)

☐ Outbound

☐ Voicemail

☐ Client-Hangup

☐ Agent-Hangup

☐ Missed-Call

Q Search

Now, let's say you want to return the first call, click and open the 'Status' drop down and set the status to Pending so that no one else tries to call them in the meantime.

Assigned To

None

Status

Pending

☐ None
☐ Open
☒ Pending
☐ Closed/Call-Back Done

Delete

From :

08047112525

completed

Call Reference Id:

cf4faaac145d661bdd670f518381541

Start Time:

Wed, 21 Apr 2021 15:09:47

End Time:

Wed, 21 Apr 2021 15:10:37

Through :

08047112525

Call Time:

Wed, 21 Apr 2021 15:09:47

Transcription:

Missed Call from 08047112525 at Wed, 21 Apr 2021 15:09:48. One or all of the agents failed to attend or were busy

Here is what happened:

Missed Call from 08047112525 at Wed, 21 Apr 2021 15:09:48. One or all of the agents failed to attend or were busy The number 08047112525 received a call from 08047112525 at Wed, 21 Apr 2021 15:09:48 The call was routed to the following members of the group "Vandana Shrivastava only" Vandana Shrivastava (09679499760), who did not pick up the call An HTTP Call was made on the url: https://script.google.com/macros/s/AKfycbw6HoxNSPxV293Lr4b0gV8Ukh5pLEf6hwbB-EXuz03jhc-Jlqv-/exec?Type=MissCall

Private Notes

+ Add Notes

You can also add a private note with your comments.

Private Notes

+ Add Notes

Now mark the Status as "Closed". And that is it.

Now, let's say you are the manager and you want to assign a missed call to someone:

Assigned To

Shivkumar Ganeshan

Status

Open

To :

Vandana Shrivastava(09679499760)

no-answer

☐ None
☐ Ishwar Sridharan
☒ Shivkumar Ganeshan

And once you do this, The agent (In this case, Shivakumar Ganesan) will get an email intimation which looks like this:

Message Assignment (Conversion team) 114798



hello@exotel.in

to me

You have been assigned a message in the Conversion team group
Voicemail from 1147986900

Transcription:

[Conversion team] Incoming Call

9.8. Admin Guide

9.8.1. Manage Users

You can invite co-workers to join your Exotel account and assign them roles for managing calls, SMS, and other features. This is useful for setting up teams and collaborating within a single account.

Invite a Co-Worker

1. Log in to your Exotel account using your admin credentials.
2. In the dashboard, click the **Co-workers and Groups** tab from the left panel.
3. On the right side of the page, click **Invite co-workers**.
4. Fill in the required information and select the role for the user (e.g., **User**, **Supervisor**, **Admin**).
5. Exotel will send an invitation email with a link. The co-worker must click the link and follow the instructions to complete their setup.
6. Once done, the co-worker's account is active.

Remove Co-Workers

If you need to change the Super Admin email for your Exotel account, you can do this by updating the list of admins.

1. Log in to your Exotel account as an **Admin**.
2. Invite a new user and assign them the **Admin** role.
3. Once the new admin has accepted the invitation, go to the **Co-workers and Groups** section.
4. Click on the trash icon against the user to proceed with deleting the user
5. Confirm removing the user in the popup with the button **Delete**

Change the Super Admin Email

If you need to change the Super Admin email for your Exotel account, you can do this by updating the list of admins.

1. Log in to your Exotel account as an **Admin**.
2. Invite a new user and assign them the **Admin** role.
3. Once the new admin has accepted the invitation, go to the **Co-workers and Groups** section.
4. Remove the old admin account that is no longer required.

The newly added admin will now act as the Super Admin for the account.

Change a Co-Worker's Email ID

Email IDs in Exotel are hardcoded in the database and cannot be edited directly from the **Co-workers & Groups** section. If you need to update the email ID of a co-worker, you must remove the existing user and re-invite them with the new email.

Steps to Change a Co-Worker's Email ID

1. **Delete the existing co-worker**

- Go to the **Co-workers & Groups** panel.
- Click the **– (minus)** sign to remove the co-worker.
- Admin access** can delete users. If you are the only Admin, temporarily assign Admin rights to a trusted co-worker so they can perform this action.

2. Invite the co-worker again

- Use the **Invite co-workers** option to re-add the user.
- Enter the **new email ID** along with the co-worker's other details (First Name, Last Name, Phone Number).
- Assign the required role (Admin or otherwise).

Re-adding a removed user with the same email ID

- You cannot re-add a user with the **same email ID** that was previously used. The system will indicate that the email is already in use.
- To resolve this, append **+1** to the original email ID.

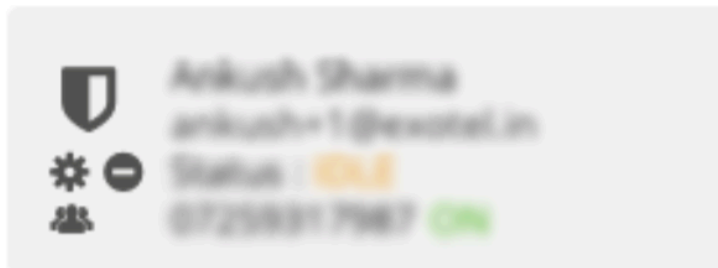
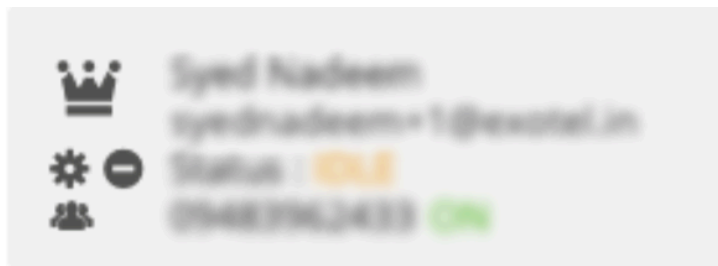
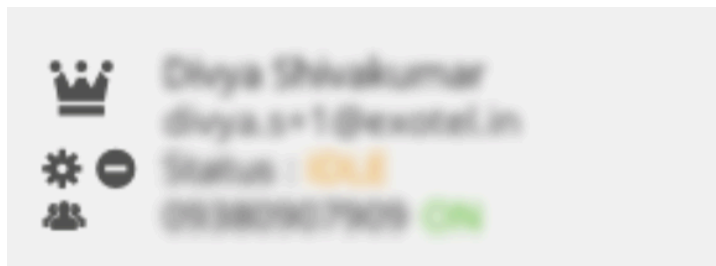
For example:

- Original email: `test@exotel.com`
- New email: `test+1@exotel.com`

The system will treat this as a new email, but all emails will still be delivered to the original inbox (`test@exotel.com`).

Change a Co-worker's role

If you need to make an already existing user into an Admin or a Supervisor, you can click on the 'Edit' icon (setting like icon) on the user in the 'Co-workers and Groups' page and select 'Admin', 'Supervisor' from the dropdown.



NOTE: Admins will have a crown icon near their name, and Supervisors will have a shield icon. This should help you differentiate if a co-worker is an Admin, Supervisor, or a regular user.

Change a Co-worker's Phone Number

You can edit your personal phone number on the [Co-workers & Groups](#) page. An explanation with images is given below.

- Go to the 'Co-workers & Groups' page on the dashboard and click the gear icon next to the user's name.

2. A pop-up opens. Enter the user details and the phone number (enter 0 followed by the mobile number). Once you have entered these details, your number will be configured.
3. To verify the newly added number, place a missed call from that number to **09513885656**.

Edit user details

First Name

Divya

Last Name

Shivakumar

Email

divya.s*1@exotel.in

Email is not Editable

Mobile or Land-line Number

09380907909

You can change your Number here

ON

When a call is routed to this person, this is the number that will be called.

To save the changes Click on Ok

NOTE:

- 1) You will be charged per user based on your User Billplan
Your current User Billplan : all users @ 0.0 credits per user per month
- 2) To verify your number,
 - a) Please give **missedcall** from newly added number to 02249360005
 - b) Get a **verification call** from Exotel

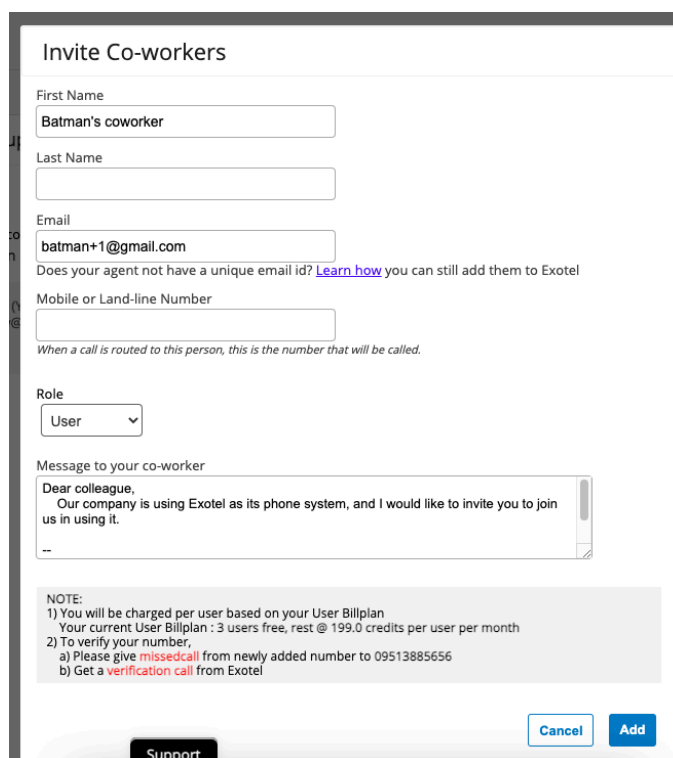
Cancel

OK

How can I add a co-worker without an email?

Sometimes you have users who have no unique email ID or ones who don't have a company email ID but you'd still like to add them to your Exotel dashboard. There is a very simple workaround to this issue.

1. Go to the 'Co-workers and Groups' tab on the left panel. Click on 'Invite co-workers' on the top right section of the dashboard.
2. Add your co-worker or agent's name.
3. You can use your own Gmail ID to sign up for your agent as well and add a '+' sign and append it with something you'll recognise. For example, if your email id is batman@gmail.com, you can sign up for your co-worker or agent with batman+1@gmail.com. When you do this, the system recognises this as a new email ID but all the communication will still be sent to you (everything after the + will be ignored).
4. This way, you can add as many co-workers as you want with the same email ID. As in you can do a +1, +2, or even something like +marketing or +sales.
5. You will still need to give your agent's phone number as this is the number Exotel will divert the calls to.



The screenshot shows the 'Invite Co-workers' form. It includes fields for First Name (filled with 'Batman's coworker'), Last Name, Email (filled with 'batman+1@gmail.com'), and Mobile or Land-line Number. A link 'Learn how' is provided for users without a unique email ID. A 'Role' dropdown is set to 'User'. A message box contains a template message: 'Dear colleague, Our company is using Exotel as its phone system, and I would like to invite you to join us in using it.' Below the form is a 'NOTE' section with billing and verification details. At the bottom are 'Cancel', 'Add', and 'Support' buttons.

Invite Co-workers

First Name
Batman's coworker

Last Name

Email
batman+1@gmail.com

Does your agent not have a unique email id? [Learn how](#) you can still add them to Exotel

Mobile or Land-line Number

When a call is routed to this person, this is the number that will be called.

Role
User

Message to your co-worker
Dear colleague,
Our company is using Exotel as its phone system, and I would like to invite you to join us in using it.

NOTE:
1) You will be charged per user based on your User Billplan
Your current User Billplan : 3 users free, rest @ 199.0 credits per user per month
2) To verify your number,
a) Please give **missedcall** from newly added number to 09513885656
b) Get a **verification call** from Exotel

Support Cancel Add

Unable to add co-worker (Invalid CSRF token alert)

While trying to add a co-worker from the Exotel dashboard, you might've stumbled upon an error message stating:

Edit user details

Invalid CSRF token try refreshing page

First Name

Last Name

Email

Mobile or Land-line Number

ON

When a call is routed to this person, this is the number that will be called.

☐ Admin

NOTE:

1) You will be charged per user based on your User Billplan
Your current User Billplan : **Zero user charges**

2) To verify your number,
a) Please give **missedcall** from newly added number to 09513885656
b) Get a **verification call** from Exotel

Support

Cancel

OK

This has been done as a product measure to increase our product security & to eliminate one-click attacks or session riding

While we understand that this could be an inconvenience to you and your team while having to increase coworkers, refreshing the page should resolve this alert.

Adding back a deleted user

To add the same user back, navigate to the Co-workers and Groups section and click on "Invite co-workers." However, you won't be able to use the same email ID for the agent, as the system will indicate that the email ID is already in use for the same or a different account.

To resolve this issue, you can append "+1" to the original email ID when adding the user again. For example, if the email ID was "test@exotel.com," you can add them as "test+1@exotel.com." This will register as a new email ID in the system, but you will still receive all emails to the original email ID, "test@exotel.com."

exotel

Namaskar, Divya S

Home

Help

Logout

Settings

Refresh

Credits: 454

Call

SMS

Call Transfer

CALLS

Inbox

Sales

Support

SMS

Outbox

TOOLS

Campaigns

CONTACTS

Address book

Co-workers and Groups

Co-workers and Groups

My co-workers

Use your mouse to drag a co-worker into a group to add him/her to the group.
Also, now you can click on icon in user-box to add/remove user's groups

Divya S (You)

Support

Invite co-workers

Add Group

Groups

Select a group to view the user list.

Sales (Total Users: 1)

Shortcode - 244007

Support (Total Users: 1)

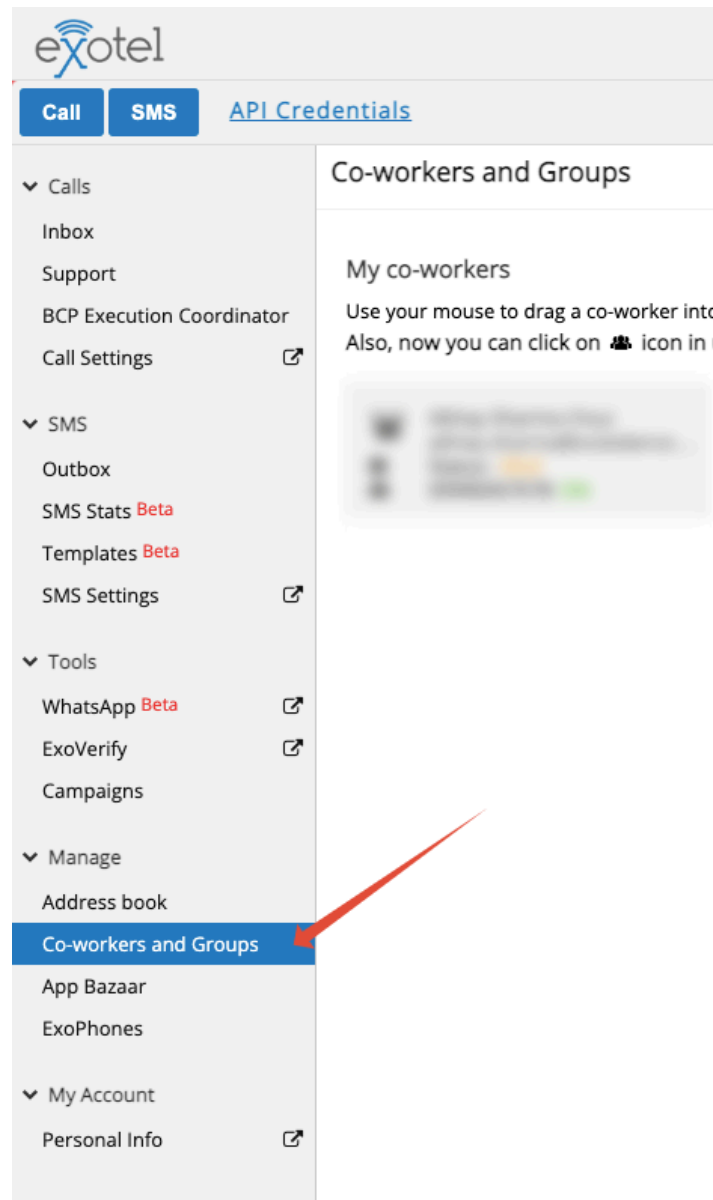
Shortcode - 244008

9.8.2. Manage Groups

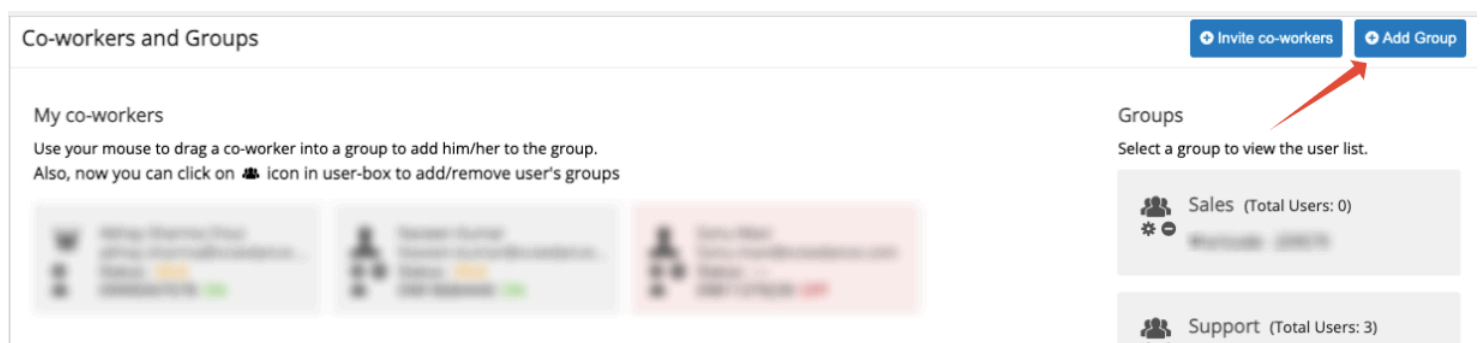
Create a Group

For creating a group on the dashboard, please follow the below steps:

Goto '**Co-workers and Groups**': <https://my.in.exotel.com/exotel/accounts>



Click on '**Add Group**'



Enter the name of the group and you are done!

Note: Email ID is not a mandatory requirement for the group.

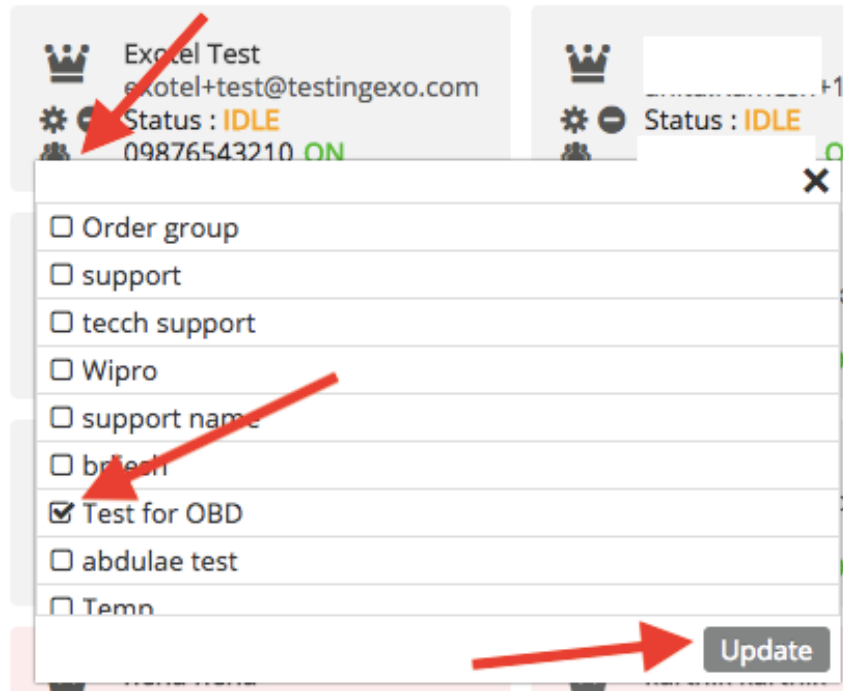
Additionally, to add a user to a group, you just need to drag and drop the user to the created group.

Add Co-worker to a Group

Add a co-worker or a new agent to your Exotel account first by following the process explained [Manage Users](#)

After the co-worker or agent is a part of your Exotel account, you can also drag and drop them into any group you want them to be a part of.

Or you can also add by following the below steps



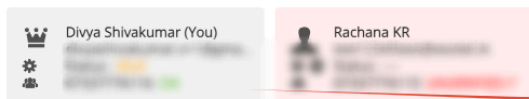
One single agent can be a part of multiple flows. So, drag and drop them to as many flows as you'd like them to be a part of.

Co-workers and Groups

[Invite co-workers](#) [Add Group](#)

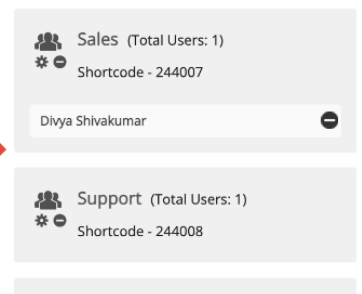
My co-workers

Use your mouse to drag a co-worker into a group to add him/her to the group.
Also, now you can click on icon in user-box to add/remove user's groups



Groups

Select a group to view the user list.



Clicking on any group will show you all the agents who're a part of that group.

Groups

Select a group to view the user list.



Sales (Total Users: 1)
 Shortcode - 244007



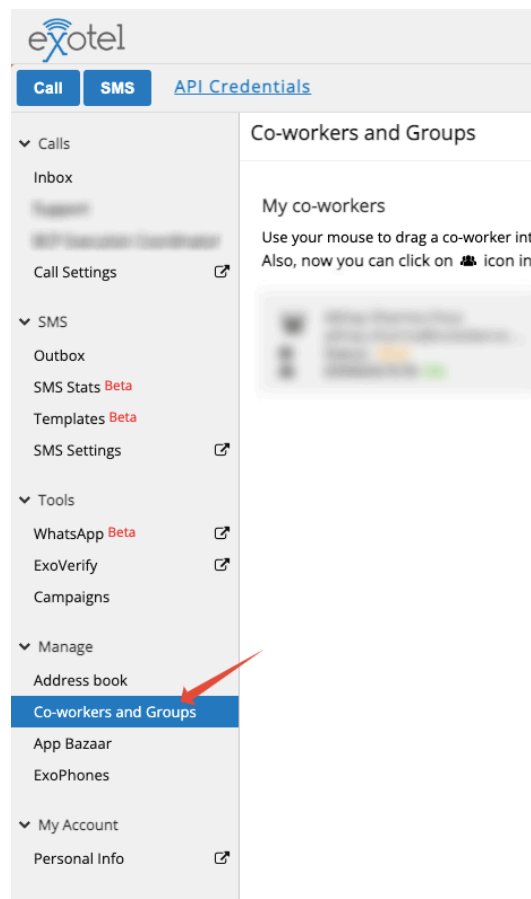
Support (Total Users: 2)
 Shortcode - 244008



Exotel_Test (Total Users: 0)
 Shortcode - 423032

Remove Co-worker from a group

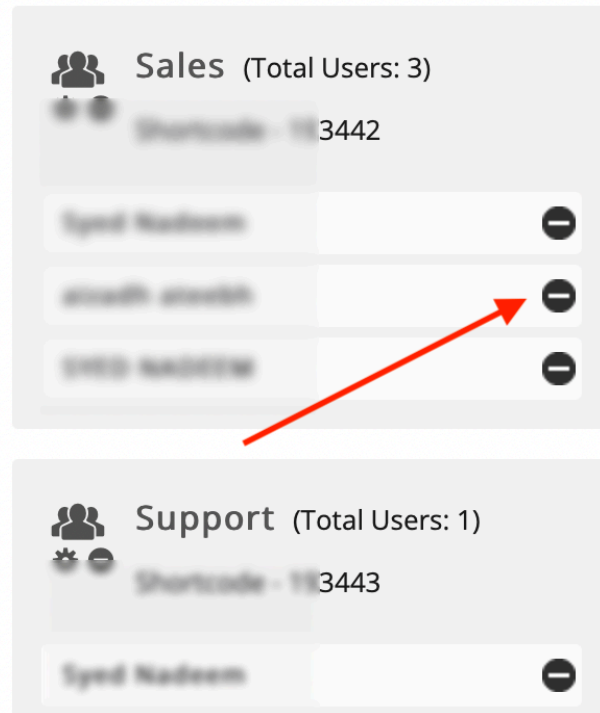
1. Login to your account and head to the Co-worker's and Group Section



2. Select the group you want to remove the user from.
3. Click on the "-" sign next to the user as shown below

Groups

Select a group to view the user list.



Sales (Total Users: 3)
Shortcode - 113442

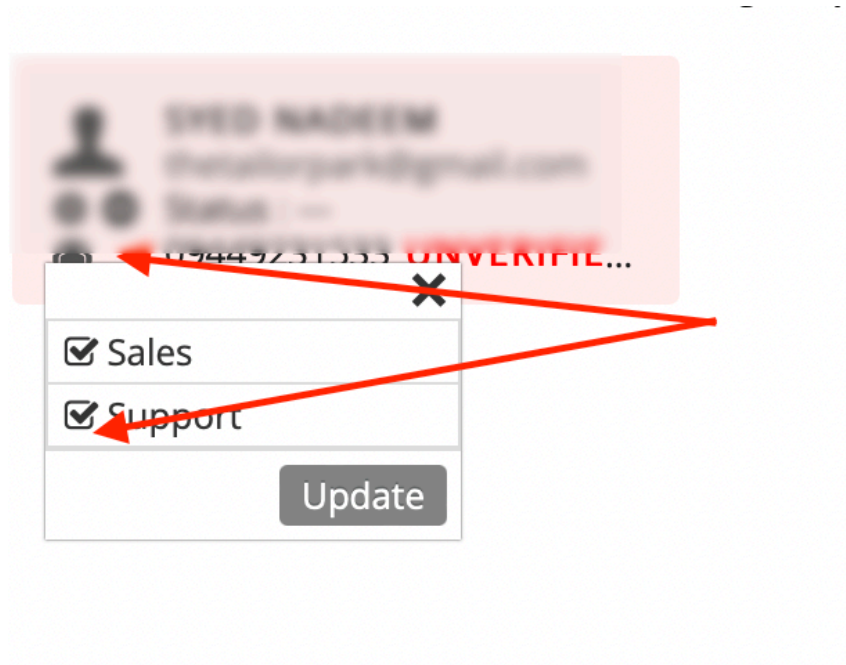
Syed Naureen -

Support (Total Users: 1)
Shortcode - 113443

Syed Naureen -

4. The user will then be removed from the group.

5. Alternatively, you can click on Group Edit option and uncheck the group you want to remove the user from.



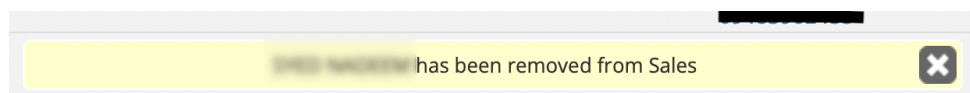
SYED NADEEM
syednaureen@gmail.com
Status: UNVERIFIED...

☒ Sales

☒ Support

Update

The user will then be removed.



SYED NADEEM has been removed from Sales

9.8.3. Signing Authority

On the company information page, we've included new fields where you can provide the specifics of your company's signing authority.

Who is a signing authority?

Signing authority is a person who is authorized to sign contracts on behalf of your company,

Signing Authority

☐ Same as [Super admin](#)

First Name :

Last Name :

Email :

What should you do?

1. If you have not added the details of the signing authority, kindly add the details to the company info page
2. If there were any changes in the signing authority details, update the signing authority details

Why do we need the details of the signing authority?

1. Usually, developers or business users use Exotel. By using Exotel, these users implicitly agree to the “Terms of Service and Privacy Policy” but your signing authority may not be aware of it.
2. Users can also view the “Terms of Service and Privacy Policy” anytime in the footer of all pages in Exotel.
3. We want to share the “Terms of Service and Privacy Policy” with your signing authority
4. If there are any changes in our “Terms of Service and Privacy Policy”, we want to share the changes with the signing authority

How do we share our “Terms of Service and Privacy Policy” with your signing authority?

We will send an email with the links to the “Terms of Service and Privacy Policy” and/or the description of the changes, if any, to the signing authority

What should the signing authority do?

- Signing authority should read the “Terms of Service and Privacy Policy” and consider this as a contract agreement between your company and Exotel.
- Singing authority should note that by using Exotel, your company implicitly agrees to the “Terms of Service and Privacy Policy” of Exotel.

98.4. Co-workers Access Rights

Here are three types of Co-workers within your Exotel account

- Admins
- Users
- Supervisors

You can spot the difference between them from the icons in the 'Co-workers and Groups' section.

Admin



Sonal Bansal

xxxxxx@xxxx.in




Status : IDLE

09876XXXXXX ON

User:



Gokul T P

xxxxxxx@xxxx.in




Status : IDLE

09953XXXXXX ON

Supervisor:



Sarthak Singhal
sarxxxxx@xxxxx.in



Status : IDLE
09953XXXXXX ON

You can change the role of a co-worker by selecting the appropriate option in the Add/Edit Co-workers popup. Click on the settings icon to get the Edit user details page view.



Sonal Bansal
xxxxx@xxxx.in



Status : IDLE
09876XXXXXX ON

Edit user details

First Name

Sonal

Last Name

Bansal

Email

xxxxxxx@xxxxx.in

Device Type

☒ Number ☐ SIP

This person will be called based on the device type - Number (PSTN) or SIP client.

Mobile or Land-line Number

09876XXXXXX

ON

When a call is routed to this person, this is the number that will be called.

Role

✓ User

Supervisor

Admin

- 1) You will be charged per user based on your User Billplan
Your current User Billplan : 6 Users free, Rs. 199 for every additional user
- 2) To verify your number,
 - a) Please give **missedcall** from newly added number to 09513885656
 - b) Get a **verification call** from Exotel

Cancel

OK

NOTE: If you change an existing co-worker's role, they would need to logout and login again for updated permissions to reflect.

Each of these Co-workers types has access to different features and functions within the product as defined below.

Section	Action	Admin	Supervisor	User
Inbox	View/Listen/Delete messages to all groups and Co-workers	Yes	No	No
	View/Listen/Delete messages to the group to which the Co-workers belong	Yes	Yes	Yes
	View/Listen/Delete messages directed to the Co-workers	Yes	Yes	Yes
	Add notes to messages	Yes	Yes	Yes
Call widget	Make an outbound call	Yes	Yes	Yes
SMS Widget	Send an SMS	Yes	Yes	Yes
Address Book	Create/Edit/Delete Contacts View/Edit the contacts created by other users	Yes	Yes	Yes
App Bazaar	Create/Edit/Delete Call Apps Create/Edit/Delete SMS Apps	Yes	No	No
Exophones	View the Exophones bought by you Connect a number with a Call/SMS App Purchase a new number	Yes	No	No
Reports	Download call and SMS reports	Yes	No	No
Analytics	View user's On/Off state	Yes	No	No
Co-workers & Groups	View co-workers/groups	Yes	Yes	Yes
Co-workers & Groups	Add,Delete & Edit Co-workers Details	Yes	No	No
Cogno AI Chat Bot	Access to the Exotel chat support	Yes	No	No
Campaigns	Schedule Bulk SMS to a selected list	Yes	No	No
FAQ page	Frequently Asked Questions	Yes	Yes	Yes
My Account	Personal Info	Yes	Yes	Yes
Settings	Access Settings page	Yes	No	No
KYC Docs	Access KYC Docs page	Yes	No	No
Bill Plan	Access Bill Plan page	Yes	No	No
Make a Payment	Access Payment page	Yes	No	No
View Bills	Access Invoice/Bills page	Yes	No	No
Payment History	Access the Payment history page	Yes	No	No

Admins can override access to some of these permissions by using the Access Control page.

Access Control

FEATURE	ACCESS DETAIL	
	Supervisor	User
API Settings	☐	☐
Address Book	☒	☐
App Bazaar	☐	☐
Audio Library	☐	☐
Balance Validity	☒	☐
Call Attempt Notification	☐	☐
Campaigns	☒	☒
Co-workers	☒	☒
Co-workers Activity	☐	☐
Cogno AI Chat Bot	☐	☐
Exophones	☐	☐
Hide Group Calls 	☐	☒
Inbox - All Call Logs 	☐	
Inbox - Recordings	☒	☐
KYC Docs	☐	☐
Live Call Centre Dashboard	☐	☐
Payments	☐	☐
Reports	☒	☒
SMS Outbox	☒	☒
Settings	☐	☐
Whitelist Settings	☐	☐
Update Changes		

- Simply check and uncheck options against the respective role to allow or remove access.
- The allowed pages would be visible to the Supervisor/User respectively.
- Pages such as co-workers and campaigns will have read-only access for Supervisors and Users by default.
- To provide admin-like privileges to particular supervisors so that they can act as Admin for the pages they have access to, kindly write to hello@exotel.com for getting that configured.

Please note we have introduced a new access right for supervisors to allow them to view all the calls on the account and the same can be controlled via Access Control.

9.8.5. Company Info

You can check which company your Exotel account is registered under from the **Company Info** section.

Steps

1. Log in to your Exotel account.
2. Go to **My Account** (spanner icon).
3. Click on **Company Info** (or access it directly via the provided link).

Information Displayed

- **Company Name**
 - This is the name under which your KYC documents must be uploaded.
 - It will also appear on invoices, receipts, and any checks issued.
 - The GSTIN, PAN, TAN, and other tax identifiers are associated with this name.
- **Address**
 - The address shown must match the address proof submitted during KYC.
 - This is the official address used for all physical correspondence from Exotel.

9.8.5.1. Finding what company your account is registered under

On Clicking "Company Info" under "My accounts" Page (or via this link here), you will see this:

Call

SMS

API Credentials

My Account

Personal Info

Company Info

KYC Docs

Personalization

Notifications

Heartbeat

Access Control

Call Settings

Audio Library

Whitelist Numbers

SMS Settings

SMS Templates

Sender ID

SMS DLT

Developer Settings

API Settings

Payment and Bills

Make a Payment

Payment History

My Company Info

Basic info

Company Name (as per PAN card)

:

Assistance Consulting India Pvt Ltd

Brand Name

:

Assistance Consulting India Pvt Ltd

PAN Card *

:

AAACN1234E

TAN Card Number

:

ATN123456789

GST Identification Status *

:

☒ Registered
 ☐ Unregistered
 ☐ Pending registration

GST Identification Number *

:

06AAACN1234E0007

Entity type

:

Company

Service Disruption Email

:

Admin@assiste.com

Billing Email Address

:

Admin@assiste.com

Billing Country

:

India

Billing address *

Building/Flat number	:	Great Learning
Floor number	:	2nd Floor
Name of premises/Building	:	Global Center
Road/Street	:	Golf Course Road Sector 55
Locality/Village	:	Gurgaon
City	:	Gurgaon
State	:	Haryana ✓
Country	:	India
Pincode	:	122002

Company name:

The company on whose name KYC documents must be uploaded is named in this sentence. The name of the business mentioned here will be on any checks that are written, if any. This GSTIN will appear on your invoices and receipts along with additional information like your PAN card, TAN card, and GST numbers.

Address:

The address there must correspond to the address evidence given.

The provided address will be used for all physical mail correspondence from Exotel.

9.8.6. Closing Account

We're sorry to see you go. If you decide to close your Exotel account, you can do this directly from the dashboard. Only **admins** have the permission to close an account.

How to Close Your Account

1. Log in as an admin.
2. Go to **My Account** (spanner icon).
3. Click **Company Info** from the left menu.
4. Scroll down and click **Close entire account**.

What Happens When You Close Your Account

- All your **ExoPhones** will be released back into the pool for others to purchase. These numbers cannot be recovered.
- All **users and their data** will be deleted. Employees will not be able to log in, and inbox data will be lost.
- All **calls and voicemail recordings** will be permanently deleted.
- Any **remaining balance** in your Exotel account will be forfeited.
- There is currently no standard way to export your data. On request, Exotel can provide a dump of your Address Book, call recordings, past reports, and invoices.

Deleting an account is final. Data once lost cannot be recovered.

Additional Notes

1. **Postpaid accounts** can only be closed by the respective Account Manager.
2. You will continue to receive **email notifications** regarding negative balance or account closure.
3. For **trial accounts**, all ExoPhones (except the trial number) will be deleted. The account itself will remain active indefinitely.

Feedback Before You Leave

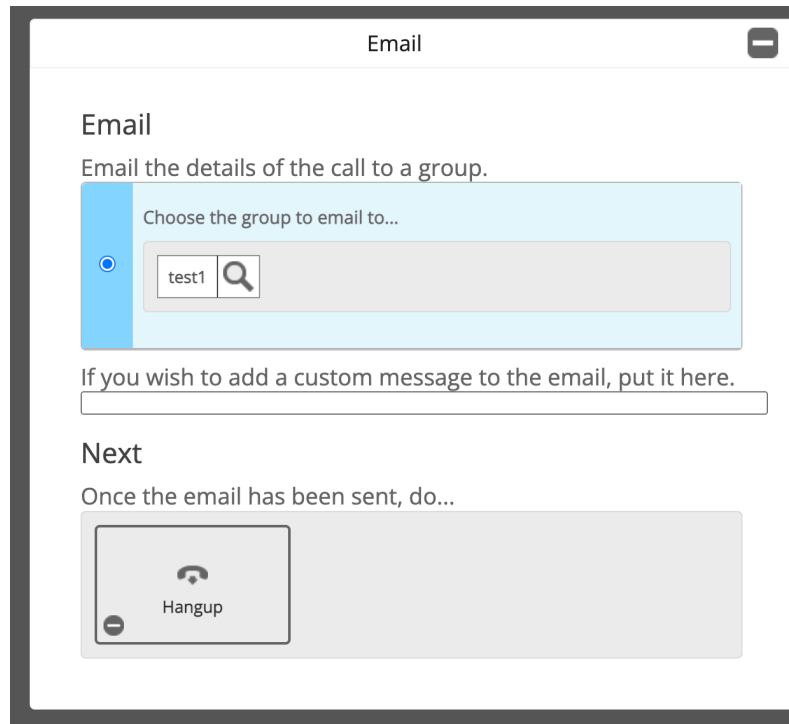
We'd love to hear from you if there's anything we can do to improve your experience.

- Write to us at hello@exotel.in
- Call us at **+91-8088919888**

9.9. Notifications and Alerts

9.9.1. Check if Exotel emails are getting delivered to your email address

So, Exotel sends emails to the registered, individual, or group email addresses at various instances – to name a few – Missed calls, Completed calls, and Voicemails. And at some point, the emails would not reach the specified email address as selected.



The screenshot shows a window titled "Email" with a close button in the top right corner. Inside the window, the title "Email" is followed by the instruction "Email the details of the call to a group." Below this is a light blue box containing the text "Choose the group to email to..." and a search input field with the text "test1" and a magnifying glass icon. Underneath the blue box is a text input field with the placeholder text "If you wish to add a custom message to the email, put it here." Below the text field, the word "Next" is displayed, followed by the instruction "Once the email has been sent, do...". At the bottom, there is a grey box containing a "Hangup" button with a phone handset icon and a minus sign.

The reasons why you may not be receiving the emails –

- Wrong group email addresses
- Your personal email address is not a part of the group email address that has been mentioned
- There are some filters applied to your email account that are either blocking the emails from noreply@exotel.in or any similar addresses as set by the System Admin in your organization
- Emails might be getting sent to spam

Steps to check for the above reasons (Prior requisite – you need to have admin privileges)

1. Go to the Co-workers and Groups page; on the right-hand panel, you will find the groups. Click on the “Gear” icon for the appropriate group name.
2. Check the email address on the pop-up screen.
 1. Please note that you can also add multiple email IDs to receive the mail.
 2. Contact your team admin if your personal email address is not a part of the group email address you found in step 1

Groups are collections of users who can be dialed and who can share voicemail messages. For example, "Sales Team" or "Technical Support"

Group Name

Divya_Exotel_test

Email Id for the group

hello@exotel.in,support@exote.in,hello+1@e

Cancel

OK



Divya_Exotel_test



(Total Users: 1)

QUEUED	ON CALL	IDLE	OFFLINE
0	0	1	0

Shortcode - 2834

9.9.2. Daily Analytics Email

The daily analytics email summarises the previous day's inbound call activity on your Exotel account.

For starters, it provides an overall summary of statistics such as this.

Are you wondering about what's happening on **your** Exotel account? Here's a gist of **your** inbound and outbound calls yesterday. Hope you will find it useful.

Inbound calls summary



** - Kudos! **Your team has** followed up with 21 missed calls using Exotel. They still are yet to callback 46 callers thereby missing an opportunity to earn ₹23000. We're assuming every missedcall on an avg. is worth ₹ 500 to you. If you feel a call is worth more (or less) you can change the value of a call [here](#)

- This says you received a total of 267 inbound calls which includes calls that you attended, missed calls as well as voicemails.
- Also, out of all the missed calls you got, your team has not called back 46 numbers
- And your coworkers spent a total of 143.5 minutes on inbound calls yesterday

Now, are you wondering how have you saved 10500 INR? This figure comes on the basis of what you have saved in your per-call value. Here, it is 500 INR.

Missed calls section

Your team missed **86 calls** of which **34** were not returned. Here are a few of them..

someone from Delhi	someone from Andhr...	someone from Mumbai
9560205553	4030455552	8451006868

This section informs you that you have 86 missed calls**. Your team has returned 52 of the 86 missed calls (including call attempts and voicemails) and has not called back 34 callers.

If you want to call a few of them, a sample of such callers is provided. By clicking on the green phone icon, you will be taken to that specific phone call on your Exotel dashboard.

Here's how we calculate the callbacks to be done:

We take all the missed calls for a particular day and remove the numbers to which there has been an outbound call (from your Exotel number) on that day. This gives us the missed calls to which there has not been any callback done.

Coworkers overview

This section gives you an overview of how many calls/minutes your colleagues spent on inbound calls. You can look out for insights like who spends the most time on calls, who attends the most calls every day, and who is being overworked.

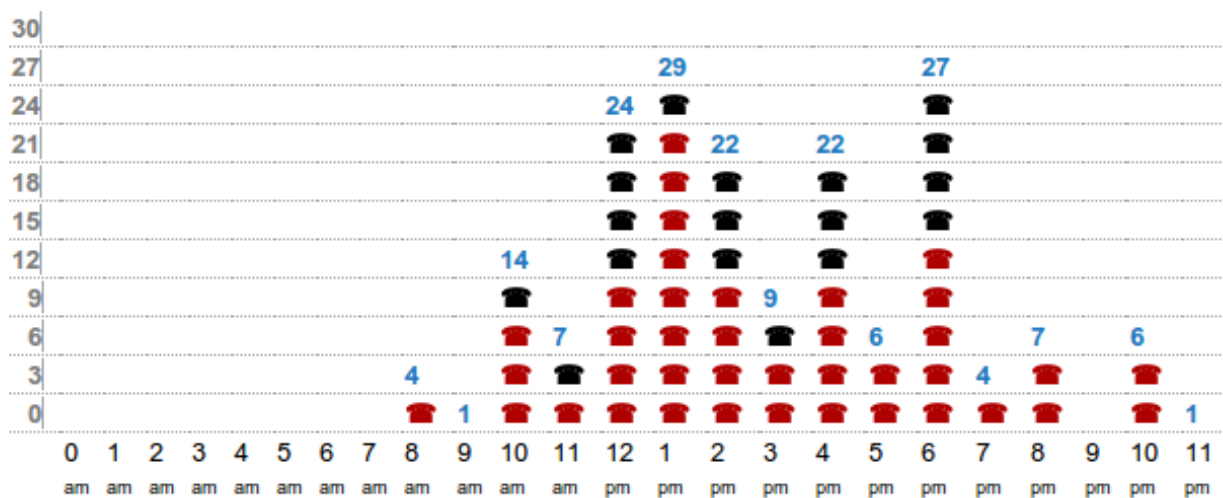
Here's what your co-workers were upto...

	Calls attended	Total minutes	Avg. duration
Ishwar Sridharan	10	33.1	3.3
Siddharth Ramesh	1	4.5	4.5
Nijanthan Hariharan	0	0	0
Ruchir Kanakia	6	9.1	1.5

Hourly Call distribution

Here is a distribution of incoming calls by hour

Some hours are busier than others. You might want to staff up accordingly.



- Attended calls - Missed calls + Voicemails **Numbers** - Total calls (missed + attended) during a particular hour

This graph gives you an idea of the number of calls you get on an hourly basis.

For example, in this graph, we can see that the hours of 12 p.m. to 2 p.m. have the highest call volume, with the majority of calls being missed. Based on this feedback, you could increase staffing during peak hours by adding more users to the group that receives calls.

All these stats include calls to all your virtual numbers

These include calls

- 1) which landed on your coworkers' phones and were not picked up as well as
- 2) calls where the caller disconnected the call even before your coworkers' phone rang (for example - the caller cut the call during your greeting prompt)

9.9.3. Payment Reminders

Credit & Billing Alert Notifications

Exotel sends proactive alerts to help you manage your account balance and avoid service interruptions.

- **For prepaid accounts**, alerts remind you to **refill credits** before your balance runs low.
- **For postpaid accounts**, alerts notify you to **make a payment** before your outstanding bill crosses the **credit limit threshold**.

Both events are important and require your attention.

You can set your preferred reminder frequency directly from the [Notification Settings](#) page.

Billing Notifications

Control when and how often Exotel alerts you about balance and validity. [Learn more.](#)

ON

Alert me for days, before my balance becomes negative

Things to Know

- **Billing cycle:** Exotel bills accounts once per month.
 - The maximum reminder duration you can set is **30 days**.
 - For example, if you set 30 days, Exotel will start sending reminders **the day after your bill is generated**, prompting you to pay for the upcoming month.
- **Default reminder period:** 4 days.
- **Delivery method:**
All billing-related alerts are sent via **email and SMS** to all account admins.
- **Frequency:**
Reducing the alert duration to **1 day** means you'll receive the notification **only once per billing cycle** (the day before your account reaches the credit limit or your balance becomes zero).
- **Custom preferences per admin:**
Each admin can configure their own alert duration.
For example, your **accounts team** may want reminders earlier than the **CEO**.
- **Predictive algorithm:**
Exotel uses a predictive model to estimate when your account might reach a **low balance or credit limit**.
This prediction is based on your past usage.
 - If your usage suddenly spikes or fluctuates heavily, the prediction accuracy may reduce.
 - Treat this alert as a **proactive indicator**, not an exact forecast.

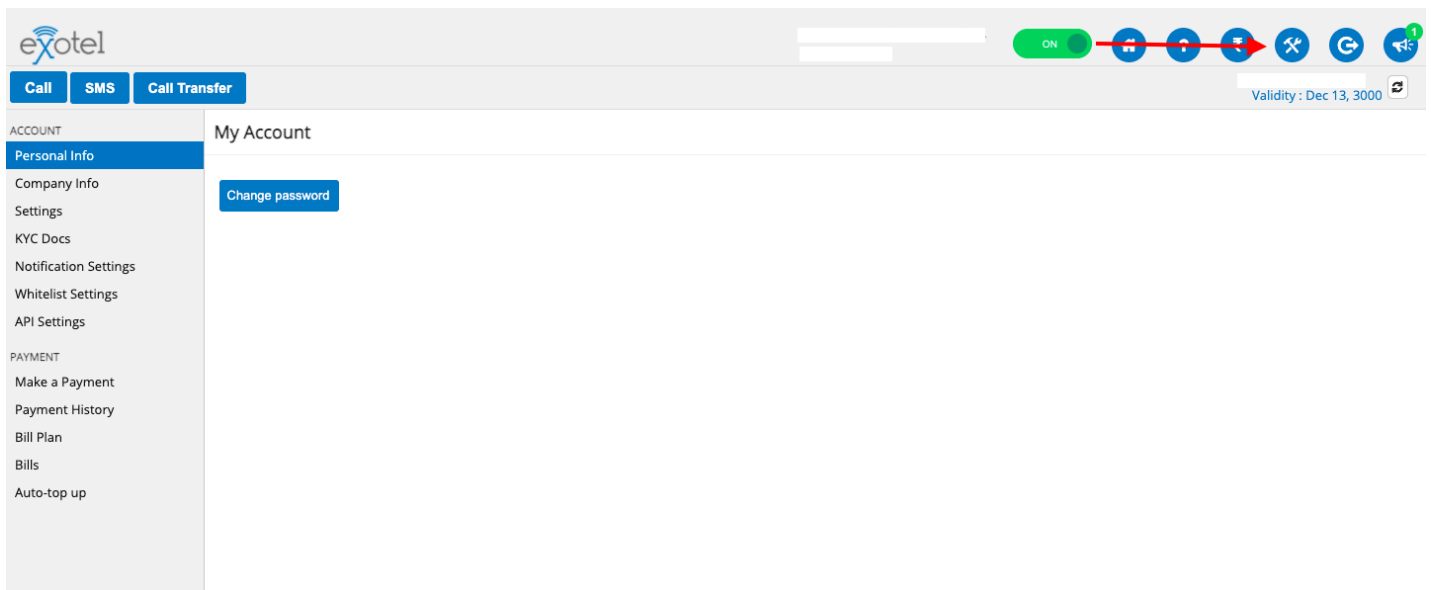
If you have any questions or concerns, please connect with us using the **chat widget** on your Exotel Dashboard or **WhatsApp us at 08088919888**.

9.9.4. Manage Notification Preferences

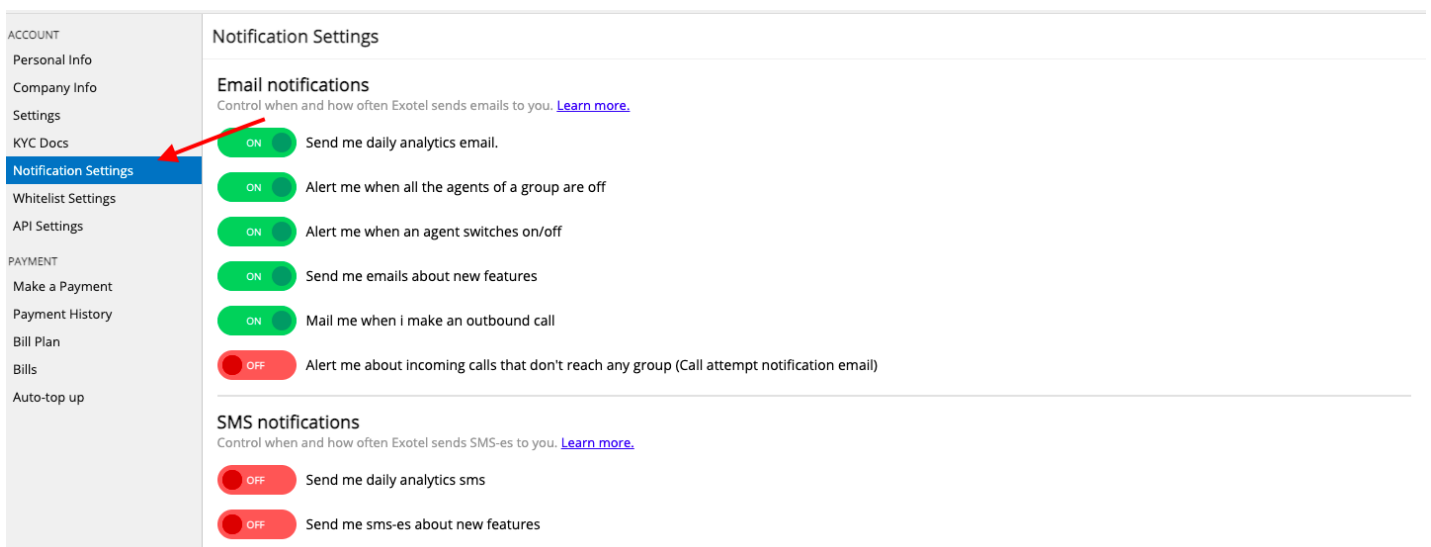
You can manage how you receive notifications from your Exotel account through the **Notification Settings** page.

Steps to Update Your Notification Preferences

1. **Log in** to your Exotel account.
2. Click on the **Settings** (spanner icon) at the top of your account.
3. From the left panel, select **Notification Settings**.



4. **Toggle On/Off** the notification boxes to set your preferred notification options.



Notes

You can opt out of most non-essential communications from Exotel.

However, some messages – such as **downtime alerts**, **billing reminders**, and other **administrative updates** – may still be sent.

At Exotel, we take your privacy seriously and ensure you're never spammed.

9.9.5. Call & SMS alerts via Email

We are not receiving Missed/Received call alerts via email. What should I do?

Call type	Apps built using App Builder	Zero, Oak tree & other call connect apps
Missed call (no one in the group picked up the call)	As a part of the "When nobody answers" option in call connect	Email address in the third option (if nobody answered the call)
Incoming call (That is, a fully attended call)	Through the Email applet (If available)	The second option in the zero app (then send an email to)
Call attempt (Person cuts the call even before the system tries to connect to you)	An email will be sent to the IDs configured in the Call-attempt Notification Email field in http://my.exotel.in//cinfo More info here	No email alert. Other notifications work
Outbound call	To the person who makes the outbound call	To the person who makes the outbound call
Voicemail	Through the Email applet in app builder	Email address in the third option (if nobody answered the call)

9.9.6. Can I get a notification email for call attempts?

Call attempts are those calls that have been disconnected by the caller before reaching out to a co-worker or a group.

Until now, you/your co-workers would have received email alerts for **missed calls** (calls that reached your co-worker's phones) but there would have been no email notification for a **call attempt** (when the caller cuts the call even before we connect the call to your co-worker).

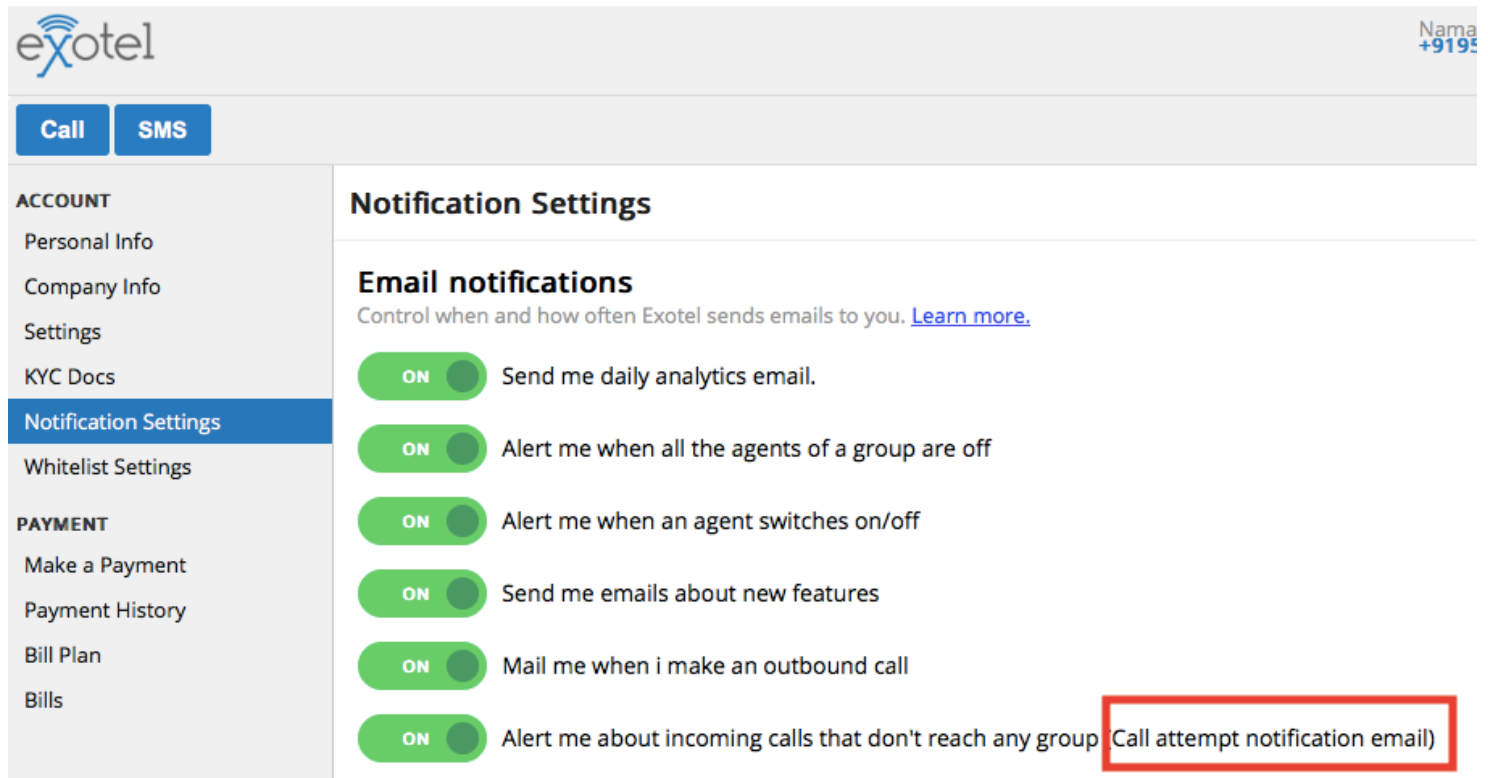
Note: Only the admins of the accounts will have access to the notification email for call attempts

See article [Why do I get so many missed calls?](#) on what call-attempts and missed-calls mean.

From now on, you can get email notifications for call attempts as well

Here's what you need to do:

1. Enable the 'call attempt notification email' field in <https://my.exotel.com/notifications>



The screenshot shows the Exotel user interface. At the top, there's a header with the Exotel logo and a user profile 'Nama +9195'. Below the header, there are two tabs: 'Call' and 'SMS'. The left sidebar contains a menu with sections: 'ACCOUNT' (Personal Info, Company Info, Settings, KYC Docs, Notification Settings, Whitelist Settings), 'PAYMENT' (Make a Payment, Payment History, Bill Plan, Bills), and 'Notification Settings' is currently selected. The main content area is titled 'Notification Settings' and contains a section for 'Email notifications' with the subtitle 'Control when and how often Exotel sends emails to you. [Learn more.](#)'. There are six toggle switches, all of which are turned 'ON'. The last toggle is labeled 'Alert me about incoming calls that don't reach any group' and is highlighted with a red box. The text 'Call attempt notification email' is visible next to this toggle.

Once you have set this up you will start receiving email notifications for call attempts on any Exophone in your Exotel account. Here's a sample email:

Subject: Call Attempt from <caller-name> (<caller-number>) on <app-name>

Sample Body:

The number 08088919888 (Exotel Support) received a call from 0987654321 at Fri, 01 Oct 2021 12:59:34

Frequently Asked Questions

I want to receive call attempt notifications only for certain Exophones or Apps. How can I do it?

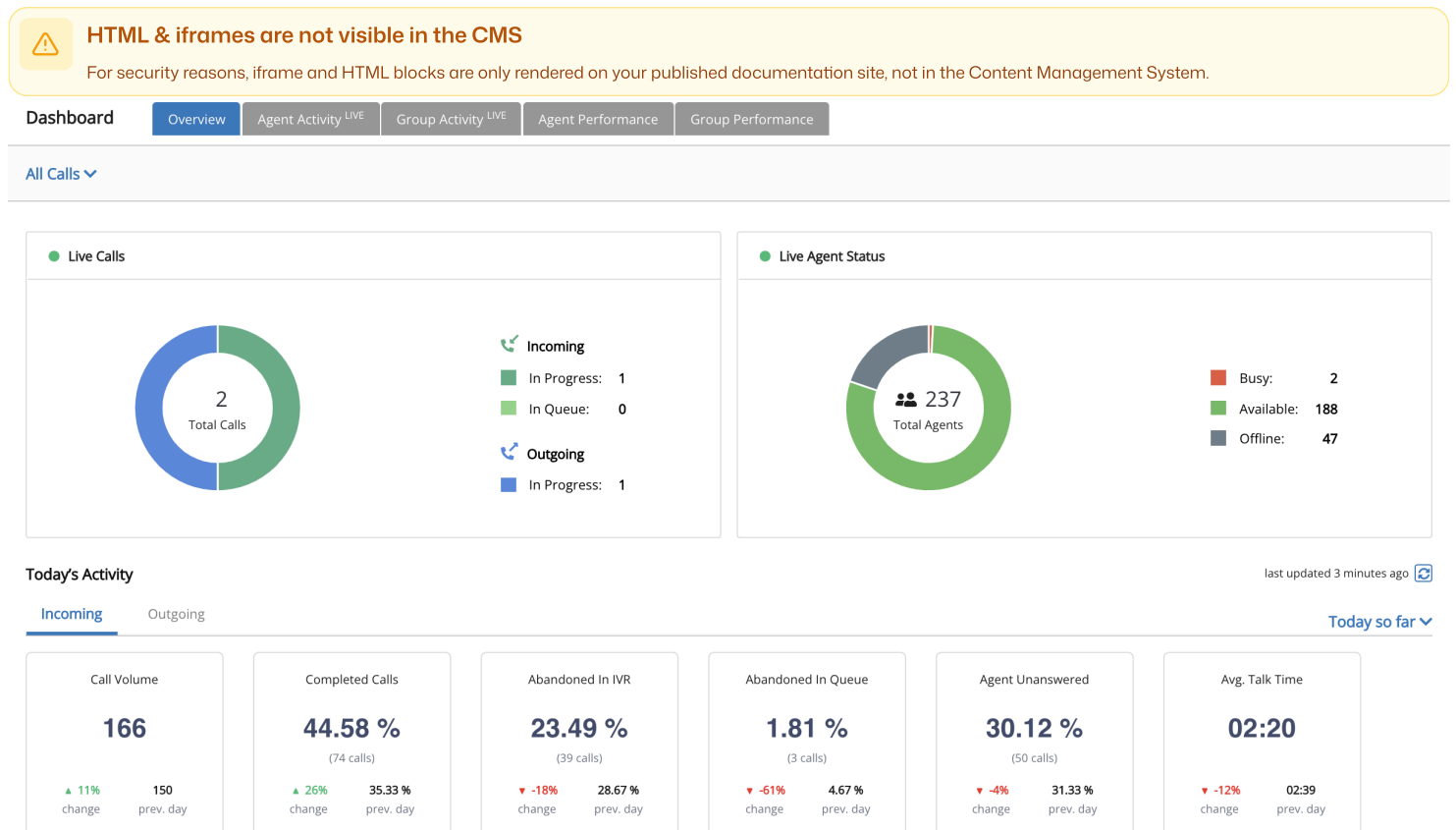
Right now we don't have a way to send notifications only for selected Exophones. But, you can setup an email filter in your account and filter for an app name (in the subject) or for the Exophone (in the body).

If you are using Gmail and need help in setting up the filters, see <https://support.google.com/mail/answer/6579?hl=en>

10. Exo Campaigns

11. Reports

11.1. Live Call Dashboard



The Live Call Dashboard is currently supported for accounts with fewer than 50 agents and less than 10K monthly call volumes. It will continue to function as-is for customers who already have it enabled.

Once this is enabled, you can access the dashboard via the left navigation (Live → Dashboard) or directly using this link:

<https://test.mum1.exotel.com/ccm/#/dashboard/overview>. It provides an overview of your contact center live metrics and today's activity.

Overview Tab

The Overview tab contains high-level live and “today’s activity” metrics for your entire account or for selected groups.

Filters

- **Group Filter**
 - Applies to both Live and Today’s activity metrics.
 - **Default:** All Calls (all groups + ungrouped calls)
 - You may select one or more groups.
- **Time (Today's activity so far)**

- View metrics for today (system timezone) or drill down to the last 1, 2, 4, or 8 hours.

Refresh rate

- Live sections (Live Calls and Live Agent Status) auto-refresh every few seconds.
- Today's activity metrics require a manual refresh or page reload. The dashboard shows when it was last updated (e.g., "last updated x minutes ago").

Metrics

Live Calls

- **Total Calls:** Active calls (sum of In Queue + In Progress Calls).

Incoming

- **In Queue:** Number of callers in queue (if queueing is enabled). If a group filter is applied, shows queued calls for the selected group(s).
- **In Progress Calls:** Active calls assigned to agents (incoming or outgoing). With a group filter, shows active calls for agents in that group.

Outgoing

- **In Progress Calls:** Active outgoing calls assigned to agents. With a group filter, shows active calls for agents in that group.

Live agent status

- **Busy (On-Call):** Agents assigned to an active call (ringing/attempted or in conversation).
- **Available (Idle):** Agents free to take calls.
- **Offline:** Agents who have turned themselves off and cannot receive calls.
- **Total Agents:** Total agents in your account or selected group.

Today's activity so far (Incoming Calls)

- **Call Volume:** Total calls received on your Exophones for today or the selected time window.
- **Completed Calls:** Calls that resulted in an answered conversation. If multiple agents were attempted but at least one answered, it counts as completed.
- **Missed Calls:** Calls where agents were attempted but no one answered. Examples:
 - Agent device rang but was not picked up (timeout/caller disconnected).
 - Agent phone unreachable/busy or network issues prevented connection.
 - If multiple agents were attempted and no one answered, it counts as one missed call.
 - If agents were attempted and the caller was queued again and disconnected, it is still a missed call.
- **Abandoned Calls:** Calls hung up with no agent assignment. Examples:
 - Disconnected by caller in greeting or IVR (not applicable if group filter is selected).
 - Disconnected by system due to off-hours or other termination (not applicable if group filter is selected).
 - Disconnected by caller in queue (no agent attempted; applicable with group filter).
- **Average Talk Time:** Average time agents spend in conversation (calculated only for completed calls).
- **Average Queue Time:** Average time callers spend in queue (answered + unanswered).
- **Longest Queue Time:** Maximum time a caller spent in queue for a call (sum across multiple queues if applicable).
- **Average Abandon Time:** Average wait time before callers hang up (considers calls abandoned in IVR/Queue).

- **Average Speed of Answer:** Time from dialing attempt to agent answer (if no queue, time from dial start until pick up). Calculated only for answered calls.

Today's activity so far (Outgoing Calls)

- **Call Volume:** Total outgoing calls for today or the selected window.
- **Completed Calls:** Calls answered by the other party (counts as completed if at least one agent answered).
- **Average Talk Time:** Average talk time for completed outgoing calls.
- **Customer Unanswered:** Agent answered but customer leg did not reach answered state (e.g., canceled, busy, no-answer). (Leg1Status = Completed && Leg2Status != Completed)
- **Agent Unanswered:** Agent was attempted but the call did not become answered due to non-completed reasons (busy, no-answer, failed). (Leg1Status != Completed)

Prev. Day / Change

- **Prev. day:** Metrics for the previous day up to the same time.
Example: Viewing at Wednesday 2:00 PM shows Tuesday's stats from 12:00 AM to 2:00 PM.
- **Change%:** Relative change vs previous day: $((B - A) / A) * 100$ where **B** = today, **A** = previous day.
Example: Prev day call volume 100 → today 150 ⇒ +50% (UP). If completed calls drop from 80% → 40% ⇒ -50% (DOWN).
- **Behavior on "Last x hours" filter:** Prev. day and Change% are computed for the same time window on the previous day.
Example: Viewing at 4:00 PM with "last 2 hours" compares 2:00–4:00 PM today vs 2:00–4:00 PM previous day.

Agent Activity (Live) Tab

Dashboard

Overview

Agent Activity ^{LIVE}

Group Activity ^{LIVE}

Agent Performance

Group Performance

All Agents ▾

237

All Agents

2

● Busy (1%)

188

● Available (79%)

47

● Offline (20%)

Name ▴ ▾	Status ▴ ▾	Time spent	Last Device On ▴ ▾
	● Available	79 days	3 months ago
	● Available	79 days	3 months ago
	● Offline	296 days	N/A
	● Offline	140 days	N/A
	● Available	317 days	10 months ago
	● Available	4 days	4 days ago
	● Available	01:11:14	8 months ago

Track what agents are doing right now. You can filter by agent name or group.

Available fields:

- **Name:** Agent name as saved on Exotel.
- **Status:** Current status – Busy, Available, or Offline.
- **Time Spent:** Time spent in current status (hh:mm:ss), updated in real time.
- **Last Device On:** Time when the agent last turned their device on to take calls.

Group Activity (Live) Tab

All Groups ▾

Group Name ▴▾	● INCOMING CALLS			● AGENT ACTIVITY			
	Queued	In Progress	Total	Busy	Available	Offline	Total
	0	0	0	0	0	0	0
	0	0	0	0	0	0	0
	0	0	0	0	0	1	1
	0	0	0	0	1	0	1
	0	0	0	0	0	0	0
	0	0	0	0	1	0	1
	0	0	0	0	1	0	1
	0	0	0	0	0	1	1
	0	0	0	1	0	0	1

Live metrics per group. You can filter one or more groups.

Metrics

- Incoming Calls
 - **Queued:** Callers in queue for that group (if queueing enabled).
 - **In Progress:** Active calls assigned to agents for that group.
 - **Total:** Sum of Queued + In Progress.
- Agent Activity
 - **Busy (On-Call):** Agents assigned to active calls (could be on calls for other groups if shared).
 - **Available (Idle):** Agents free to take calls.
 - **Offline:** Agents who have turned themselves off.
 - **Total:** Total agents for the group.

Agent Performance Tab

Name ⬆	Overall Stats					
	Total Device On Time	Idle Time	Total Calls ⬆	Completed Calls ⬆	Average Talk Time ⬆	Total Talk Time ⬆
	14:24:45	14:24:45	N/A	N/A	N/A	N/A
	14:24:45	14:10:04	5	4	00:02:15	00:08:58
	14:24:45	14:13:17	1	1	00:06:06	00:06:06
	14:24:45	14:24:45	N/A	N/A	N/A	N/A
	14:24:45	14:24:45	N/A	N/A	N/A	N/A
	14:24:45	14:24:45	N/A	N/A	N/A	N/A
	14:24:45	14:24:45	N/A	N/A	N/A	N/A

Track agent performance for today or yesterday.

Metric	Meaning
Overall (Incoming + Outgoing)	
Total Device On Time	Total time agent had device on to take calls
Idle Time	Total time agent was free to take calls
Total Calls	Sum of Total Calls received (incoming) and initiated (outgoing) by the agent
Completed Calls	Total calls answered by the agent (incoming + outgoing)
Average Talk Time	Average talk time across completed calls (incoming + outgoing)
Total Talk Time	Sum of all conversation time across completed calls
Incoming	
Total Calls Offered	Total calls offered to the agent (regardless of whether another agent answered)
Completed Calls	Number of offered calls that were answered by the agent
Missed Calls	Offered calls not answered by the agent (counts even if another agent answered)
Average Talk Time	Average talk time for completed incoming calls
Total Talk Time	Sum of conversation time for the agent
Average Speed of Answer	Average time taken by agent to pick up incoming calls (dial start → pick up)
Outgoing	
Total Calls Initiated	Outgoing calls initiated by the agent
Completed Outgoing Calls	Outgoing calls where conversation occurred (counts if at least one agent answered)
Agent Unanswered	Agent was attempted but did not reach answered state (busy/no-answer/failed)
Customer Unanswered	Agent answered but the customer leg did not (e.g., Leg1 answered, Leg2 not answered)
Average Outgoing Talk Time	Average talk time for completed outgoing calls
Total Outgoing Talk Time	Sum of outgoing conversation time for the agent

Note: Outgoing calls initiated via the Voice Platform API and not answered by the agent are not considered call center calls and will not appear against the agent on this dashboard. To capture agent data for outgoing calls via API, route calls via the Outgoing CCM API or trigger via the Exotel Dashboard. See: <https://developer.exotel.com/api/ccm-calls>

Downloading Agent Performance Report

- Click the download icon to get the CSV. You will also receive this report via your registered email once generated.

Summary

Created on
12/11/2021, 08:34:30

Created by
Jyoti Arya

Filtered by
0 agent(s)

For Time Period
12/11/2021 - 12/11/2021

×



Your report is ready to download

Report has also been emailed to you.

 **DOWNLOAD REPORT**

N/A

N/A

N/A

N/A

Summary

Created on
12/11/2021, 04:53:40

Created by
Jyoti Arya

Filtered by
0 agent(s)

For Time Period
12/11/2021 - 12/11/2021

×



Your report is getting prepared...

You can wait or choose to close this window. The report will be emailed to you once it's ready

 **DOWNLOAD REPORT**

N/A

N/A

N/A

N/A

N/A

Dashboard

Overview

Agent Activity LIVE

Group Activity LIVE

Agent Performance

Group Performance

All Agents ▾ Today so far ▾

last updated 11 minutes ago 

Overall

Incoming

Outgoing



Name 	Overall Stats					
	Total Device On Time	Idle Time	Total Calls 	Completed Calls 	Average Talk Time 	Total Talk Time 
	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A
	16:46:27	16:46:27	N/A	N/A	N/A	N/A

Note: The data sources and logic used for the User/Group report differ from the Live Call Dashboard. For longer historical ranges, use the User/Group report; for today and yesterday, use the Live Call Dashboard.

Group Performance Tab

Dashboard

Overview

Agent Activity LIVE

Group Activity LIVE

Agent Performance

Group Performance

All Groups ▾ Today so far ▾

last updated a few seconds ago 

Incoming Calls

Group Name 	Missed	Abandoned in Queue	Average Talk Time	Average Queue Time	Longest Queue Time	Average Abandon Time	Average Speed of Answer
	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	2	N/A	00:03:40	00:00:11	00:00:25	N/A	00:00:14
	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Track group performance for today or yesterday.

Metric	Meaning
Total Calls	Total calls offered to the group
Answered Calls	Calls answered by at least one agent in the group
Missed Calls	Calls attempted by agents but not answered (includes calls disconnected in queue with agent attempts)
Abandoned in Queue	Calls abandoned in queue without any agent attempt
Average Talk Time	Average conversation time per group (Avg Talk Time = Sum talk time / total calls with talk time > 0)
Average Queue Time	Average queue time per group (includes dial attempt time)
Longest Queue Time	Maximum total queue time for a call at group level (sum across queues if applicable)
Average Abandon Time	Average wait time before callers hang up (considers abandoned-in-queue calls)
Average Speed of Answer	Time in queue + dial attempt time until answer (includes dial attempts across multiple agents)

Frequently Asked Questions

Behavior of Missed Calls in the Live Call Dashboard (LCD)

A call is marked as **missed** only if **none of the agents in the group answers it**.

For example, if a call rings for four agents sequentially and the fifth agent answers, it **will not** be displayed as a missed call in the LCD.

This distinction ensures that the dashboard accurately represents only **unanswered calls that need follow-up**, rather than calls eventually answered after multiple attempts.

Updating Queued Calls

The Live Call Dashboard **refreshes every 10 seconds**, so changes in the queue may not appear instantly.

If a caller seems stuck in the queue for longer than 10 seconds, review the following:

- **Verify Queue Music Duration:**

Check whether the queue music exceeds 10 seconds. A longer track may make it seem like the caller is stuck.

- **Investigate Potential Issues:**

If the queue music duration is reasonable but the caller still appears stuck, contact support at hello@exotel.in.

Do note this feature is currently under **Private Beta**. For feedback or bugs, email hello@exotel.com.

11.2. Call Analytics

The Call Analytics dashboard gives you a high-level overview of your SMS stats.

Access detailed Call Analytics in your sidemenu under **Call Analytics**

Tab 1: Call Stats

Filters

These filters apply to all graphs shown on this page

- **Direction:** Inbound, outbound-API, and outbound dial
- **Date:** Filter by Start date and End date

Total Calls

Total Calls indicate the total call volume for the specified time period.

A call typically consists of 2 legs. The statuses of these legs define the successful completion of a call.

Call Status (Leg 1)

The following is the list of all the leg 1 call statuses :

- **Completed:** The call was answered and ended normally
- **No answer:** The call ended without being answered
- **Failed:** The call could not be completed as dialed, most likely because the phone number was non-existent
- **Busy:** The caller received a busy signal

Dial Call Status (Leg 2)

- **Canceled:** The call was canceled while queued or ringing
- **NA:** The call to that leg was not attempted
- **Completed:** The call was answered and has ended normally
- **No answer:** The call ended without being answered
- **Failed:** The call could not be completed as dialed, most likely because the phone number was non-existent
- **Busy:** The caller received a busy signal

Call Direction

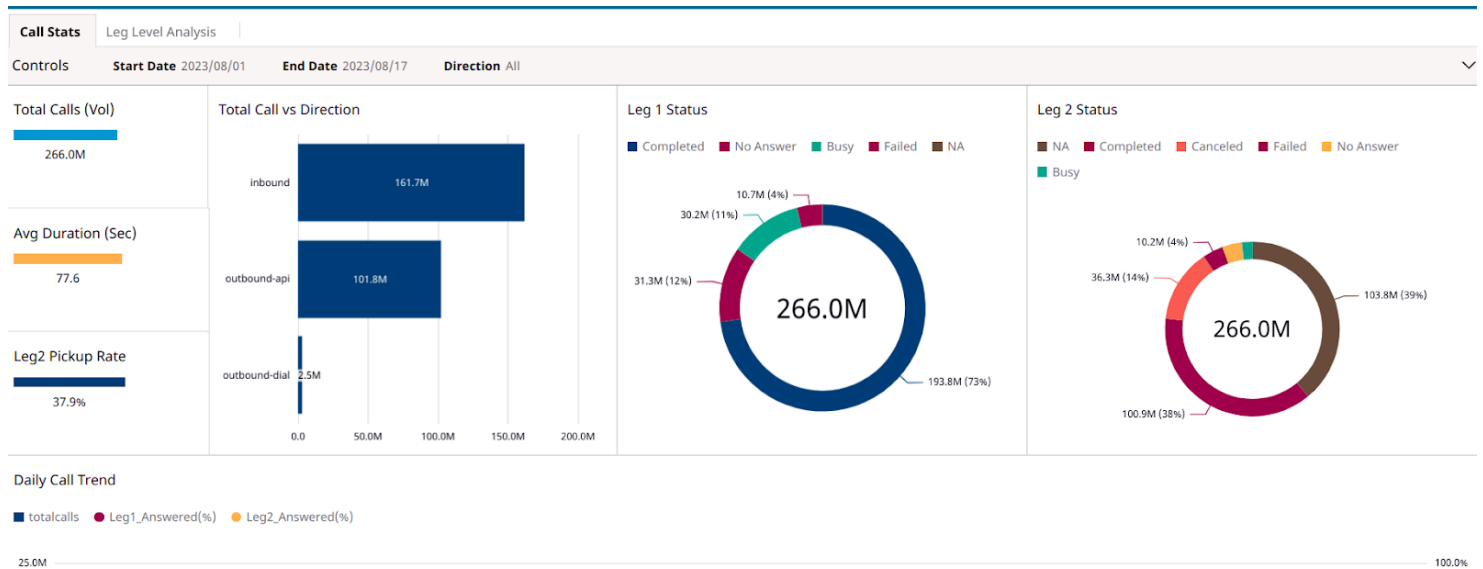
- **inbound -** Incoming call
- **outbound-dial -** Outbound calls from Exotel dashboard
- **outbound-API -** All other Outbound calls (API, campaign, etc.)

Call pickup rate

This is the call completion rate of the leg 2 calls.

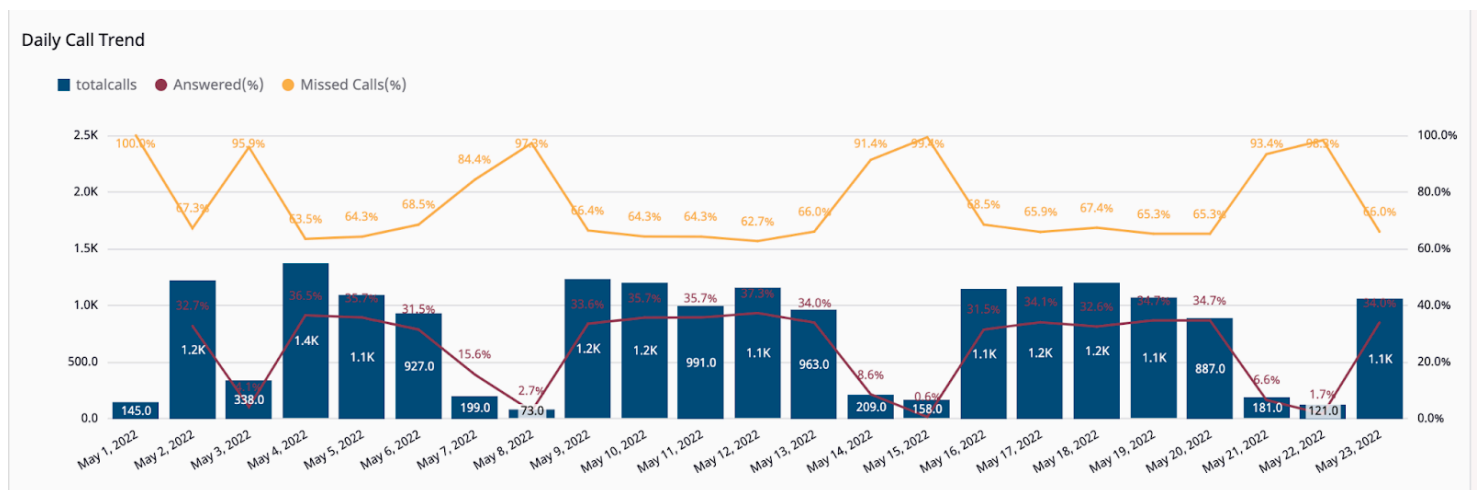
Avg Duration (sec)

The average duration of the calls where the leg 2 status is completed.



Daily Call trends

This visualization indicates the daily change in the overall call volume, answer rate & missed calls rate over the defined time range.



A separate visualization depicts the

- Inbound calls daily volume trends along with their completion percentages &
- Outbound call's daily volume trends along with their various statuses.

Tab 2: Leg Level Analysis

Filters

These filters apply to all graphs shown on this page

- **Direction:** Inbound, outbound-API, and outbound dial

- **Date:** Filter by Start date and End date
- **From_Region:** List of all States in India where the leg originated
- **To_Region:** List of all States in India where the leg landed
- **Origin:** Inbound, outbound-API, and outbound dial
- **Status:** Busy, Completed, Failed and No answer

Total Legs

Total leg volume indicates the sum of all the call legs for the specified time frame. This number will always be greater than or equal to the Call volume.

The terminology used in the dashboard is defined as follows:

- **Completed Legs:** Call legs where the dial call status is Completed. This also implies the call duration will be greater than 0
- **Completed Inbound Legs (Vol & %age):** The legs where the direction = Inbound. The percentage is calculated against the total volume
- **Completed Outbound Legs (Vol & %age):** The legs where the direction = Outbound. The percentage is calculated against the total volume

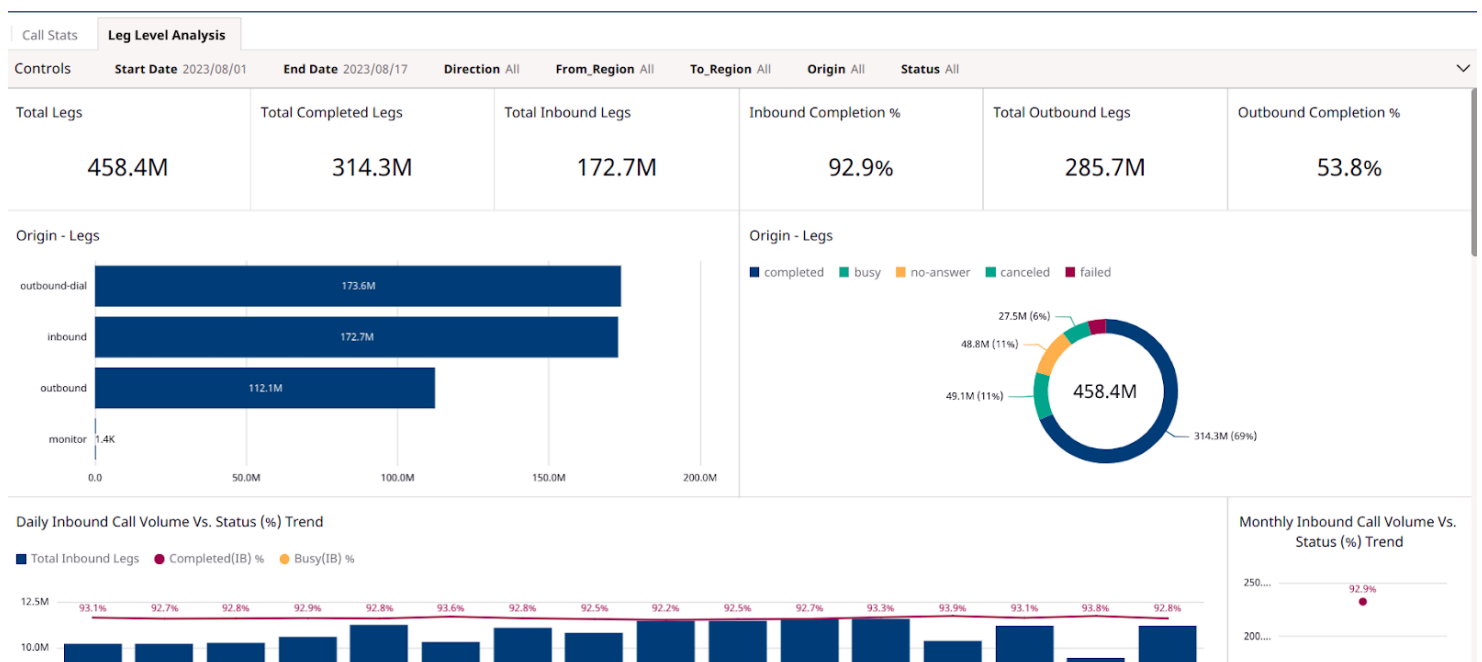
The row below these numbers indicates the variance in the above metrics, from the previous day.

Origin

- inbound - Incoming call
- outbound-dial - Outbound calls from Exotel dashboard
- outbound-API - All other Outbound calls (API, campaign, etc.)

Dial Call Status

- Completed: The call was answered and has ended normally
- No answer: The call ended without being answered
- Failed: The call could not be completed as dialed, most likely because the phone number was non-existent
- Busy: The caller received a busy signal

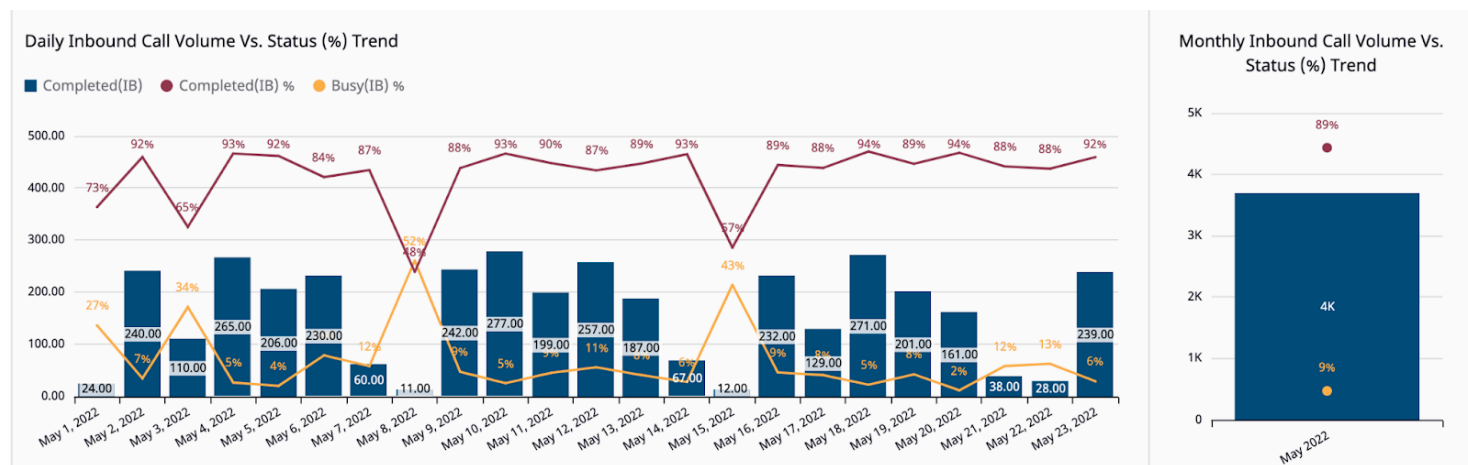


Daily Volume Vs Status Trends

This visualization indicates the change in the overall call volume and their statuses over the defined time range.

The graph captures a daily range, as well as a monthly average.

The dashboard contains two separate visualizations for the Inbound and Outbound calls.



Daily Legs Status Vs. Call Origin Trend

This visualization provides the details of the call origin for each day for the defined time frame on a dial call status level

Daily Legs Status Vs. Call Origin Trend

		Day							
Origin	Status	May 23, 2022		May 22, 2022		May 21, 2022		May 20, 2022	
		Legs	Legs(%)	Legs	Legs(%)	Legs	Legs(%)	Legs	Legs(%)
inbound	completed	239.00	91.92%	28.00	87.50%	38.00	88.37%	161.00	93.60%
	busy	15.00	5.77%	4.00	12.50%	5.00	11.63%	4.00	2.33%
	no-answer	3.00	1.15%					5.00	2.91%
	failed	3.00	1.15%					2.00	1.16%
	Subtotal	260.00	100.00%	32.00	100.00%	43.00	100.00%	172.00	100.00%
outbound	completed	645.00	81.85%	36.00	40.45%	65.00	50.39%	589.00	83.66%
	no-answer	91.00	11.55%	47.00	52.81%	44.00	34.11%	79.00	11.22%
	failed	46.00	5.84%	4.00	4.49%	16.00	12.40%	32.00	4.55%
	busy	6.00	0.76%	2.00	2.25%	4.00	3.10%	4.00	0.57%
	Subtotal	788.00	100.00%	89.00	100.00%	129.00	100.00%	704.00	100.00%
Total		1.87K	100.00%	126.00	100.00%	219.00	100.00%	1.60K	100.00%

Data Download

The data can be downloaded from the Quicksight dashboard in the following formats:

- CSV
- Excel
- PDF

11.3. Call Inbox

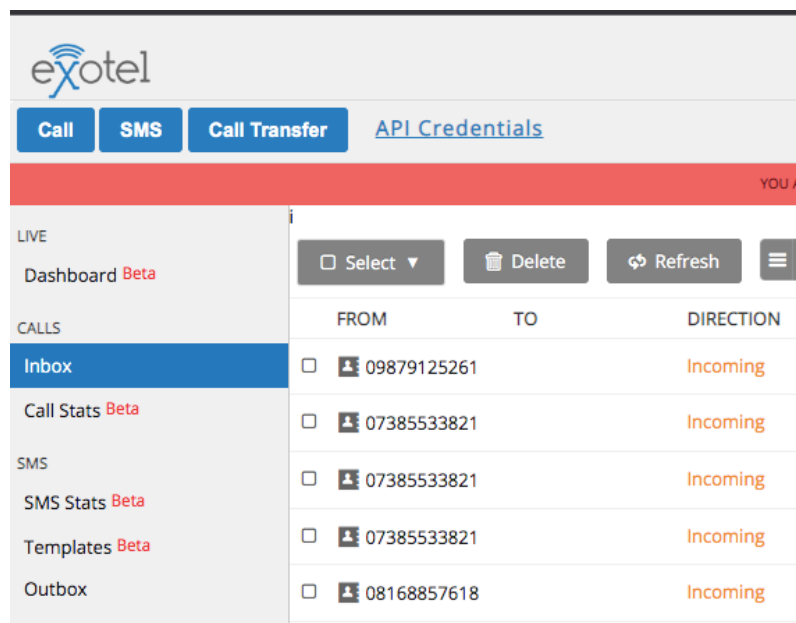
What is Call Inbox?

Call inbox is a dashboard where:

- Every call whether outbound or inbound is displayed in the inbox (Analogous to E-mail).
- You can get vital call information like the date, time, duration, type, reference ID associated with each call.
- By clicking on the number you can add the user to the address book by filling in his/her basic information. This will help the system recognize the next time a call is received from this number.
- You can also access the mini CRM where you can assign status like open, closed, or pending to each call and add notes to remember information worth noting.
- For an incoming call, you can assign the call to any user in the group so that he can follow up.
- It contains a search/filter option to filter out calls. We can filter out calls using the parameters like Call time period, Direction, Exophone, Agent, Call Type, etc.
- It also contains Advanced filter options like Duration condition, App type, App name, Assigned agent, Group, etc.

For calls received by you as a part of a group (that is, when you connect the call to a group), it will also show up in a separate "group inbox" view.

For example, we have a group called "Sales" and hence it shows up like this:



FROM	TO	DIRECTION
☐ 09879125261		Incoming
☐ 07385533821		Incoming
☐ 07385533821		Incoming
☐ 07385533821		Incoming
☐ 08168857618		Incoming

Below are the labels available in the Inbox

Label	Meaning
From	String; The phone number that will be called first and displayed on the dashboard as "From"
To	"To" is the number from which the second leg of the call is connected.
Direction	The call will either be an Incoming call or an outgoing call
ExoPhone/Flow	In case of an outgoing call, the ExoPhone used to trigger the call will be displayed, In case of an incoming call, the flow name will be visible. Please note, in case of an API call to connect a number to a call flow, the flow name will be displayed.
Time	The time when the call occurred
Outcome	Based on scenarios the outcome of the call is decided. The below tables represents the same
Call duration	It will display the overall duration of the call(which is the cumulative duration of all the recordings for ex: multiple recording in case of call transfer) along with an option to play the recording.

The outcome of a call

Text	Direction	Scenario
Call was successful	Inbound/outbound	When both the parties, i.e Leg 1 and Leg 2 answered the call and the status for both the legs is completed
No agent/user answered	Inbound	In an incoming call scenario when the second leg status is no-answer
Client unanswered	Outbound	In an outbound call scenario when the Second Leg status is no-answer
Client hung up before connecting to any user	Inbound	In an inbound call scenario where the call is hung up before it's connects to any agent or the Leg 2 status is N/A
User hung up before connecting to any client	Outbound	In an outbound call scenario where the call is hung up before it's connects to any customer or the Leg 2 status is N/A
Client hung up during the call	Inbound	In an inbound call scenario where the Leg 2 status is canceled
User hung up during the call	Outbound	In an Outbound call scenario where the Leg 2 status is canceled

×

Filter your search

Call time period

Yesterday

▼

ExoPhone

08045695014

×

▼

Call Direction

Incoming

▼

Call Type

Client-Hangup

×

Missed-Call

×

Call-Attempt

×

▼

Agent

Kiran Srinivasan

×

▼

Advanced

▲

To

Q Search

●

●

●

●

●

●

●

●

●

Advanced filter option

×

Advanced

▲

To

From

Duration

Duration Condition

▼

App Type

Select your option...

▼

App Name

Select your option...

▼

Group

Select your option...

▼

Assigned To

Select your option...

▼

Q Search

377 / 511

Business Phone System

Modified: 07/15/2026

11.3.1. Call Inbox Advanced Search

We have an improved search function that allows you to search based on a number of parameters including From, Duration, Call Direction, ExoPhone, Group, Agent, Call Type, To, Call time period, Duration, App Type, App Name, Assigned to, etc.

Locating any call is now a breeze!

Search by call parameter, e.g. agent name, number, etc.

Search

×

Filter your search

Call time period

All ▼

ExoPhone

Select your option... ▼

Call Direction

All ▼

Call Type

Select your option... ▼

Agent

Select your option... ▼

Advanced ▼

Search

To

From

Duration

Duration Condition

▼

App Type

Select your option...

▼

App Name

Select your option...

▼

Group

Select your option...

▼

Assigned To

Select your option...

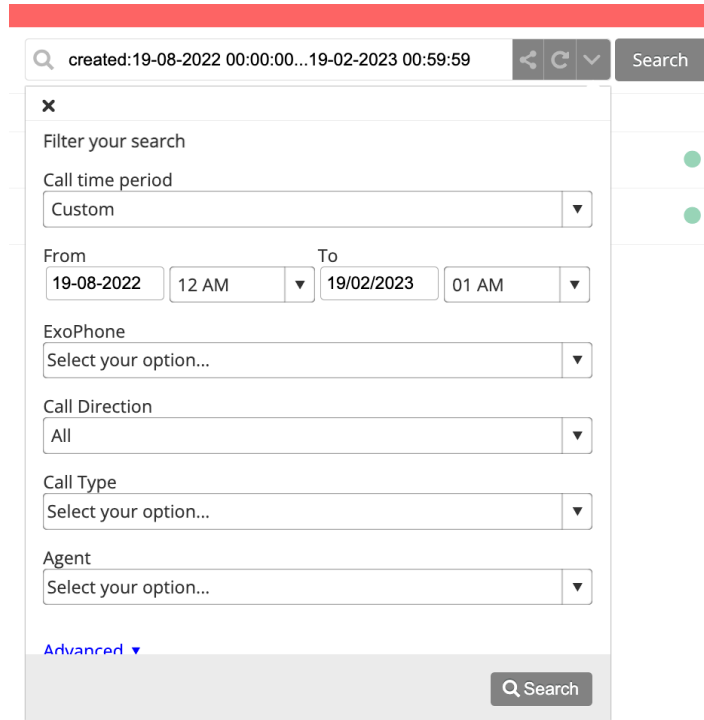
▼

Q Search

11.3.2. How to search call logs older than 7 days?

Please note that as per our recent update, by default you will not be able to view call records older than 7 days.

Alternatively, Please select the period as custom and the last 6 months in the Inbox section on the right side of your dashboard, then click on search to retrieve the call records for the selected months.



The screenshot shows a search bar at the top with the text "created:19-08-2022 00:00:00...19-02-2023 00:59:59" and a "Search" button. Below the search bar is a dropdown menu titled "Filter your search". The menu contains several filter options, each with a dropdown arrow:

- Call time period: Custom
- From: 19-08-2022 12 AM To: 19/02/2023 01 AM
- ExoPhone: Select your option...
- Call Direction: All
- Call Type: Select your option...
- Agent: Select your option...

At the bottom of the dropdown menu, there is an "Advanced" link with a downward arrow. A "Search" button is located at the bottom right of the dropdown menu.

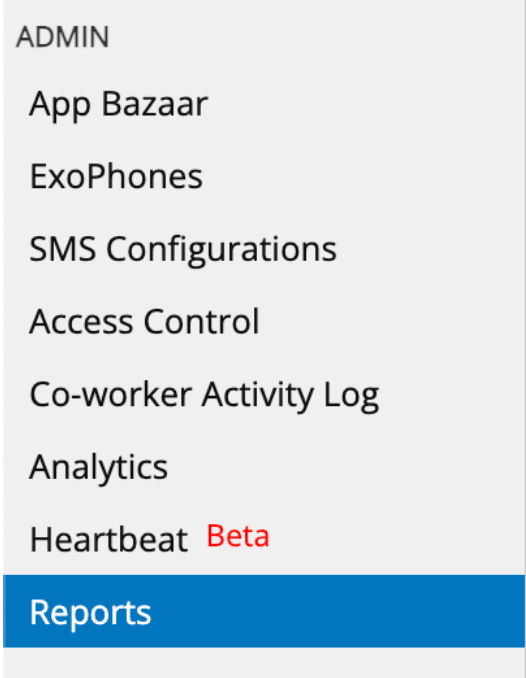
If you want to look up calls made to a specific number or call reference ID, you may do that too. You should be able to receive the call details if you click on the filters, choose the duration as custom, choose the most recent six months, and then, after selecting those options with a comma (,), click on the field for the mobile number or call reference ID as shown below.

Example: created:19-08-2022 00:00:00...19-02-2023 00:59:59, b01499c203d4b6f3efac1766cc491713 or phone number

11.4. Call Reports

Access Reports

Your Call and SMS reports can be found under Admin-> Reports.



Download reports

Reports are available for download daily, monthly (on a billing cycle), or even for *custom dates. Additionally, you can get reports for a particular virtual number if you have many numbers. * Please note that we only refer to custom data that is 6 months old from the current date. Data older than six months is not kept on our end.

Reports

UsageUsers/Groups

Generate my

✓ SMS

Call

report for

Yesterday

Generate

Exotel Number

All

SMS Type

All SMS

Status of SMS

All SMS

LATEST DOWNLOADED DAILY REPORTS	DOWNLOAD LINK
Daily Call Report for Thu, 28 Jul 2022, 00:00:00 to 23:59:59	Download
Daily Call Report for Tue, 03 Dec 2019, 00:00:00 to 23:59:59	Download
Monthly SMS Report for November requested at 03 Dec 2019, 17:47:17	Download
Sample Call report	Download
Sample SMS report	Download

LATEST DOWNLOADED DAILY REPORTS	DOWNLOAD LINK
Daily Call Report for Thu, 28 Jul 2022, 00:00:00 to 23:59:59	Download
Daily Call Report for Tue, 03 Dec 2019, 00:00:00 to 23:59:59	Download
Monthly SMS Report for November requested at 03 Dec 2019, 17:47:17	Download
Sample Call report	Download
Sample SMS report	Download

The reports can be downloaded in the CSV format and the various fields within the reports are listed below:

Position	Field	Description (possible values)
1	Id	Unique ID of the call
2	Direction	(Inbound / Outbound-dial / Outbound-API)
3	Type	If this is a Transnational or Promotional call. Exotel now only supports Transnational calls, so all calls will be having the same type.
4	ExotelNumber	It is the ExoPhone Number through which the call is routed or the ExoPhone Number that is used to make the call
5	From	Inbound call – The caller's number Outbound call – Your agent's number
6	FromName	Inbound call – The caller's name if present in your address book, else blank Outbound call – Your agent's name
7	To	Inbound call – 1) The Agent's number if the call is connected to an agent 2) Your Exotel number if no agent talked to the caller Outbound call – The dialled number
8	ToName	Inbound call – The Agent's Name Outbound call – The name of the person who was called if present in your address book
9	Status	It represents the overall status of the call. Please see the 'Status Legend' table
10	StartTime	Time at which the call started
11	EndTime	Time at which the call ended
12	Duration	This represents the overall duration of the call in seconds.
13	Price	Price for the call as per your billing currency
14	RecordingUrl	The call's recording URL - if applicable
15	PriceDetails	Pricing of the call with the call duration and amount for each leg of the call. Inbound calls will have one-leg pricing details and outbound calls will have pricing for both the legs of the call.
16	GroupName	This field shows the group which received an incoming call (if applicable). This field is populated only for calls that reach a Connect applet where a group is configured.
17	FromCircle	It represents the region of the 'From' number. Please see the 'FromCircle / ToCircle Legend' below. Do note, that the metadata accuracy may vary due to the porting of mobile numbers.
18	To Circle	It represents the region of the 'To' number. Please see the 'FromCircle / ToCircle Legend' below. Do note, that the metadata accuracy may vary due to the porting of mobile numbers.
19	Leg1Status NEW	Status of the first leg (From number) of the call. Can be one of - completed - The call was answered and has ended normally - busy - The caller received a busy signal - failed - The call could not be completed as dialled, most likely because the phone number was non-existent - no-answer - The call ended without being answered - cancelled - The call was cancelled while queued or ringing

Position	Field	Description (possible values)
		For details on various scenarios for call status with respect to incoming/outgoing calls, refer here.
20	Leg2Status NEW	Status of the second leg (To number) of the call. Can be one of - completed - The call was answered and has ended normally - busy - The caller received a busy signal - no-answer - The call ended without being answered - failed - The call could not be completed as dialled, most likely because the phone number was non-existent - cancelled - The call was cancelled while queued or ringing - N/A - The call did not have a second leg For details on various scenarios for call status with respect to incoming/outgoing calls, refer here.
21	ConversationDuration NEW	The duration in seconds for the time From and To phone numbers was on call in seconds speaking to each other. This will be set to 0 if no conversation occurred. NOTE: If there is more than one conversation such as 'Transfer' this information would be for the last conversation.
22	AppID NEW	It represents the ID of the app (flow) used for the call. This will be set to blank if the app (flow) is not used.
23	AppName NEW	It represents the name of the app (flow) used for the call. This will be set to blank if the app (flow) is not used.
24	Digits NEW	It represents the digits (key pressed) by the caller on the call. Each IVR/Gather applet's key would be separated by ' ' symbol. If no key was pressed in IVR, it will not appear in the sequence. For example: 1 2 3 (If the user pressed 1 in 1st IVR, 2 in 2nd IVR, and 3 in 3rd IVR) You can use the split text to columns option in Excel if required.
25	DisconnectedBy NEW	It shows 'who disconnected the call'. - Caller - If the caller disconnected the call. - Callee - If the callee disconnected the call. - Operator - If the call gets disconnected by the operator.

Status Legend

Direction	Possible 'Status' values	Meaning
Inbound	completed	Was connected to an agent
Inbound	call-attempt	The call was disconnected before Connect applet (OR) there was no connect applet in the flow
Inbound	missed-call	All agents were unable to pick up the call (OR) the caller terminated the call while ringing the agents
Inbound	voicemail	The caller left a voicemail NOTE: This overrides the above statuses. For example, if none of the agents was able to pick up the call, and then the caller left a voicemail, the Status will be voicemail and not missed-call
Outbound-Dial/Outbound-API	completed	"All is well"
Outbound-Dial/Outbound-API	no-answer	The dialled number (either the first number or the second) did not pick up the call
Outbound-Dial/Outbound-API	busy	The dialled number (either the first number or the second) was busy (ie, cut the call)
Outbound-Dial/Outbound-API	failed	Either leg of the call failed due to connectivity issues

FromCircle, ToCircle Legend

Circle Name	Value
AP	Andhra Pradesh Telecom Circle
AS	Assam Telecom Circle
BR	Bihar & Jharkhand Telecom Circle
CH	Chennai Metro Telecom Circle (includes Chennai, MEPZ & Mahabalipuram)
DL	Delhi Metro Telecom Circle (includes NCR, Faridabad, Ghaziabad, Gurgaon & Noida)
GJ	Gujarat Telecom Circle (includes Daman & Diu, Dadra & Nagar Haveli)
HP	Himachal Pradesh Telecom Circle
HR	Haryana Telecom Circle (excludes Faridabad, Gurgaon & Panchkula)
JK	Jammu & Kashmir Telecom Circle
KL	Kerala Telecom Circle (includes Lakshadweep)
KA	Karnataka Telecom Circle
KO	Kolkata Metro Telecom Circle (includes parts of Haora, Hooghly, North & South 24 Parganas, and Nadia Districts)
MH	Maharashtra Telecom Circle (includes Goa but excludes Mumbai, Navi Mumbai & Kalyan)
MP	Madhya Pradesh & Chhattisgarh Telecom Circle
MU	Mumbai Metro Telecom Circle (includes Navi Mumbai & Kalyan)
NE	North East India Telecom Circle (includes Arunachal Pradesh, Meghalaya, Mizoram, Nagaland, Manipur & Tripura)
OR	Orissa Telecom Circle
PB	Punjab Telecom Circle (includes Chandigarh & Panchkula)
RJ	Rajasthan Telecom Circle
TN	Tamil Nadu Telecom Circle (excludes CH Chennai, MEPZ, Mahabalipuram & Minjur and includes Pondicherry except for Yanam & Mahe)
UE	Uttar Pradesh (East) Telecom Circle
UW	Uttar Pradesh (West) & Uttarakhand Telecom Circle (excludes Ghaziabad & Noida)
WB	West Bengal Telecom Circle (includes Andaman & Nicobar, Sikkim excludes Calcutta Telecom District)
AN	Andaman & Nicobar
BY	Mumbai Metro Telecom Circle (includes Navi Mumbai & Kalyan)
HA	Haryana Telecom Circle (excludes Faridabad, Gurgaon & Panchkula)
ND	Delhi Metro Telecom Circle (includes NCR, Faridabad, Ghaziabad, Gurgaon & Noida)
UPE	Uttar Pradesh (East) Telecom Circle
UPW	Uttar Pradesh (West) & Uttarakhand Telecom Circle (excludes Ghaziabad & Noida)

Users/Group Report

You can download reports daily, monthly (billing cycle), or even for custom dates based on the Groups and the Users you have in your Dashboard.

The report contains data such as AverageHandlingTimeInMinutes, Agents device activity (amount of time the device was on) along with details of the number of calls for that agent. E.g: Missed calls, No answer, Incoming calls, etc.

--> See more information in [**User/Group Report**](#)

11.4.1. Billable Duration For Outbound Call

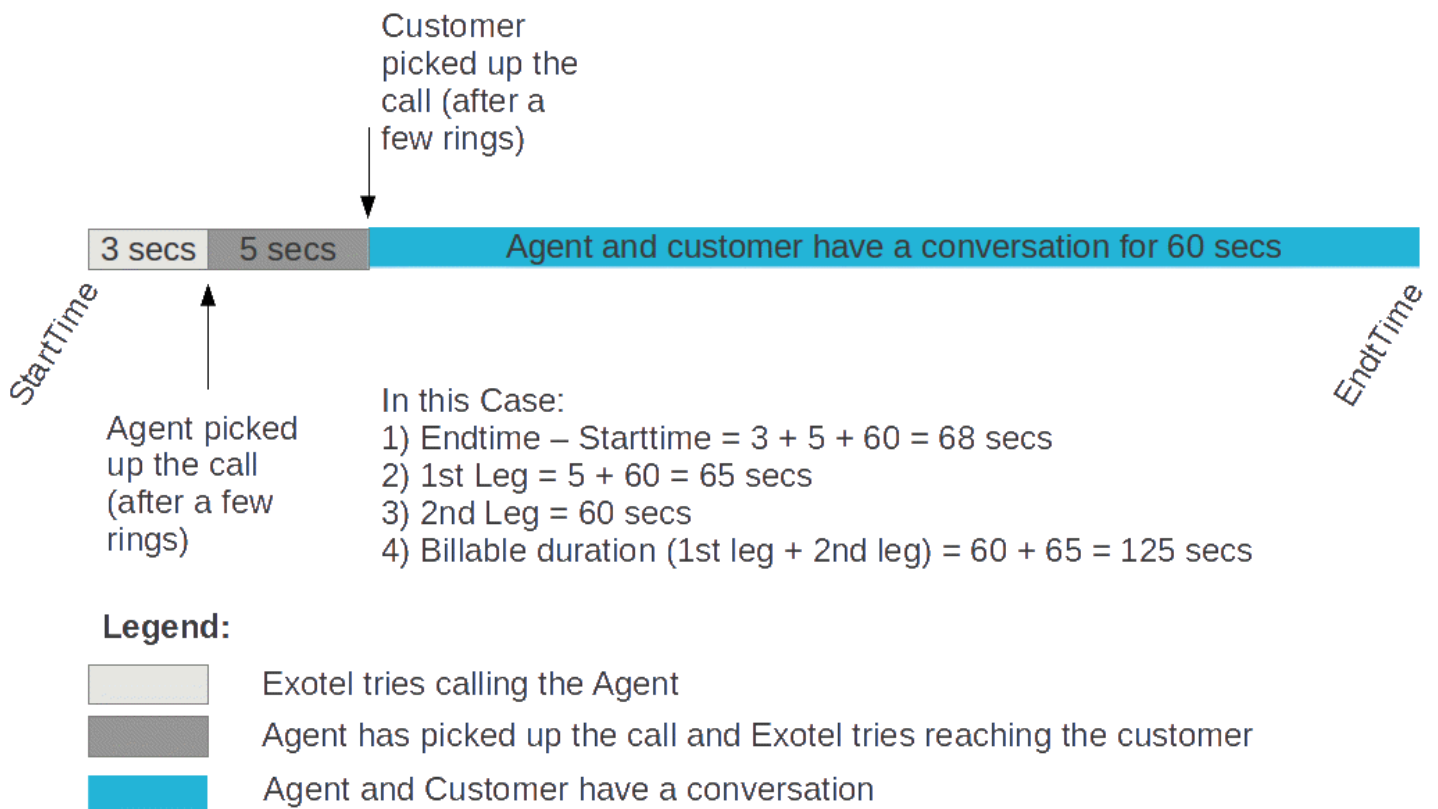


HTML & iframes are not visible in the CMS

For security reasons, iframe and HTML blocks are only rendered on your published documentation site, not in the Content Management System.

Let's say an agent makes an outbound call to your customer using the 'Call' button on your Exotel dashboard. First, Exotel dials the agent's phone (1st leg), and once s/he picks up the call, Exotel now calls your customer (2nd leg) and connects the two. Here is an illustration of how we calculate the Billable Duration.

Sample Timeline for Outbound Calls

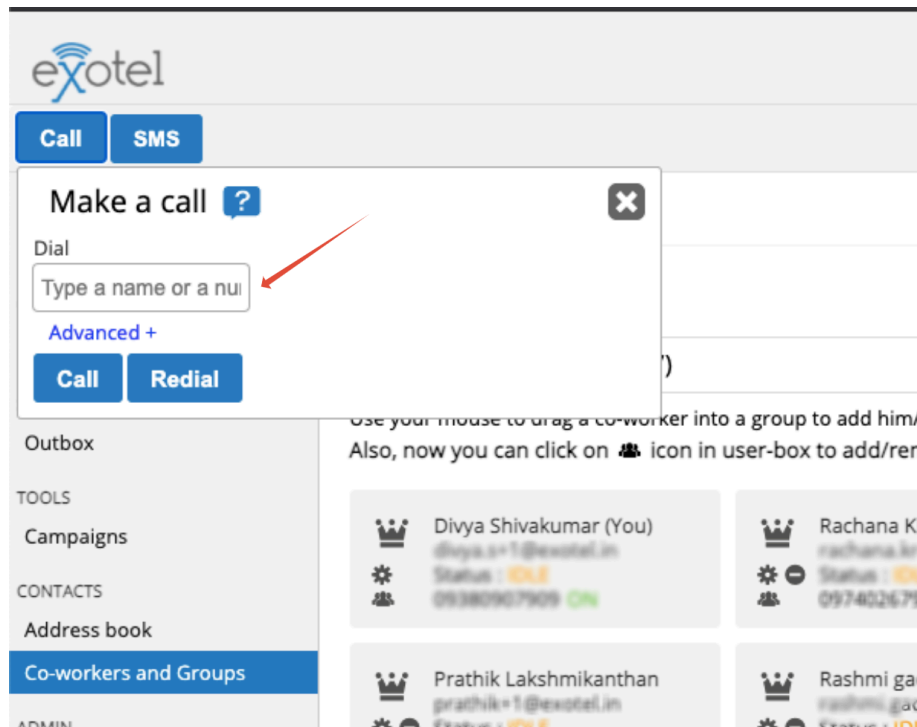


11.4.2. What is the difference between "outbound-dial" and "outbound-api"?

The values in the "Direction" column of a call report are outbound-api and outbound-dial.

An outgoing call performed via the API is known as outbound-api (most likely through the call connect API). An example of this is a Click-to-Call made through an API that is integrated with any CRM utilising the Connect API.

An outbound call is one that is placed from the dashboard or another device (through the call button)



11.4.3. Call Status

For any call that gets routed via Exotel, the status is tabulated based on the direction of the call initiation viz. Incoming and Outgoing, which in turn results in inferring the Leg1 status (status of the 1st party on the call i.e. From Number) and Leg2 status (status of the 2nd party on the call i.e. To Number).

Dashboard: Inbox & Reports

- **Completed** - the caller & the callee were successfully connected over a call
- **Call attempt** - the caller hung up before the call could be routed to any of the agents
- **Missed call:**
 - No answer - the call was not answered by any of the agents after it rang for the specified duration
 - Busy - none of the agents were available to answer the call
 - Failed - calls could not either reach or connect to the agents
- **Voicemail** - based on the call flow, if a voicemail applet is configured, then any calls that end up here would have a final status indicating that it is a 'voicemail'

Dashboard: Call Stats (Beta)

This feature is available only on demand and might be chargeable. Please contact your account manager or write to hello@exotel.com.

What does the status bucket mean on the page?

- **completed** - The destination number answered the call.
- **no-answer** - Exotel dialed the number but no one answered before the timeout elapsed.
- **canceled** - The caller disconnected the call during a dial attempt or ringing the destination number.
- **busy** - Exotel dialed the number but received a busy response from the destination number.

Inbound calls

Leg1Status will always be 'completed' if the call is picked up by Exotel i.e., if the caller is connecting to a call flow that has a menu prompt such as Greeting, IVR, Gather, and Voicemail as the first applet.

Leg1Status	Leg2Status (DialCallStatus)	Status	Description
completed	completed	completed	This indicates that a connection was established and audio was exchanged between the caller and the callee.
completed	no-answer	completed	Exotel dialed the number but we did not get an answered event back before the timeout value elapsed.
completed	busy	completed	Exotel dialed the number but received a busy response
completed	failed	completed	Exotel's carriers could not connect the call. Possible reasons include the number is switched off or not reachable, the number being invalid, transient connection error, etc.
completed	canceled	completed	Exotel dialed the number (Leg2) but Leg1 disconnected the call before we received the completed / busy / failed / no-answer signal (i.e. before the timeout period elapsed). This can occur if a user disconnects when the call is queued / ringing or as he begins to hear the operator tone suggesting the phone number is invalid or switched off.
completed	N/A (empty)	completed	The incoming call didn't have a second leg or the user disconnected before Exotel reached the connect applet to begin dialing.
Completed	N/A	Missed-Call	This status comes up when all of your agents were busy on other calls or all of them had toggled off.

Leg1Status can vary in case the caller is connecting to a call flow that does not have a menu prompt in the beginning as Exotel will directly patch the user to the 2nd leg without picking up the call.

Leg1Status	Leg2Status (DialCallStatus)	Status	Description
busy	no-answer / busy	completed	Exotel dialed the number but we did not get answered event back before the timeout value elapsed or Leg2 disconnected. In such cases, Exotel will send a busy signal back to Leg1.
no-answer	no-answer	completed	Exotel dialed the number but we did not get answered event back before the timeout value elapsed. In such cases, Exotel will send a no-answer signal back to Leg1.
busy	canceled	completed	Exotel dialed the number but Leg1 disconnected the call before the timeout value elapsed. In such cases, Exotel will receive a busy signal from Leg1.

NOTE: In case of an incoming call, for all purposes, Leg2Status will determine all scenarios to find out what happened with a call. 'Status' and 'Leg1Status' are not really relevant to be used for practical purposes and are present due to archaic (backward compatibility) reasons

Explanation:

- The overall 'Status' will always be 'completed' in case of an incoming call as it has successfully arrived at Exotel from the caller.
- Leg2Status (also passed as 'DialCallStatus' in pass-thru) will refer to the call status of the callee (to whom the caller wanted to get connected to) of the last attempted number via the connect applet (if it attempts to multiple numbers).

Outbound calls

Connecting two numbers (API Link)

Leg1Status	Leg2Status (DialCallStatus)	Status	Description
completed	completed	completed	This indicates that a connection was established and audio was exchanged between the caller and the callee.
completed	no-answer	no-answer	This indicates Leg1 picked up the call and Exotel dialed the Leg2 number but we did not get an answered event back before the timeout value elapsed.
completed	busy	busy	This indicates Leg1 picked up the call and Exotel dialed the Leg2 number but received a busy response
completed	failed	failed	This indicates Leg1 picked up the call and Exotel dialed the Leg2 number but Exotel's carriers could not connect the call. Possible reasons include the number is switched off or not reachable, the number being invalid, transient connection error, etc.
completed	canceled	failed	Exotel dialed the number (Leg2) but Leg1 disconnected the call before we received the completed / busy / failed / no-answer signal (i.e. before the timeout period elapsed). This can occur if a user disconnects before the ringing is completed or as soon as he begins to hear the operator tone suggesting the phone number is invalid / switched off.
completed	N/A (empty)	failed	This indicates Leg1 picked up the call but the call didn't have a second leg or the user disconnected before Exotel began to dial.
no-answer	N/A (empty)	no-answer	This indicates Exotel dialed the Leg1 number but we did not get an answered event back before the timeout value elapsed.
busy	N/A (empty)	busy	Exotel dialed the Leg1 number but received a busy response.
failed	N/A (empty)	failed	Exotel's carriers could not connect Leg1 of the call. Possible reasons include the number is switched off or not reachable, the number being invalid, transient connection error, etc.

NOTE: In case of an outgoing call, for all purposes, Leg1Status and Leg2Status will determine all scenarios to find out what happened with a call. 'Status' is not really relevant to be used for practical purposes and is present due to archaic (backward compatibility) reasons

Connecting a number to a call flow (API Link)

Leg1 Status	Leg2 Status (DialCallStatus)	Status	Description
completed	completed	completed	This indicates that a connection was established and audio was exchanged between the caller and the callee.
completed	no-answer	completed	This indicates Leg1 picked up the call and Exotel dialed the Leg2 number but we did not get an answered event back before the timeout value elapsed.
completed	busy	completed	This indicates Leg1 picked up the call and Exotel dialed the Leg2 number but received a busy response
completed	failed	completed	This indicates Leg1 picked up the call and Exotel dialed the Leg2 number but Exotel's carriers could not connect the call. Possible reasons include the number is switched off or not reachable, the number is invalid, transient connection error, etc.
completed	canceled	completed	Exotel dialed the number (Leg2) but Leg1 disconnected the call before we received the completed / busy / failed / no-answer signal (i.e. before the timeout period elapsed). This can occur if a user disconnects before the ringing is completed or as soon as he begins to hear the operator tone suggesting the phone number is invalid / switched off.
completed	N/A (empty)	completed	This indicates Leg1 picked up the call but the call didn't have a second leg or the user disconnected before Exotel began to dial.
no-answer	N/A (empty)	no-answer	This indicates Exotel dialed the Leg1 number but we did not get an answered event back before the timeout value elapsed.
busy	N/A (empty)	busy	Exotel dialed the Leg1 number but received a busy response.
failed	N/A (empty)	failed	Exotel's carriers could not connect Leg1 of the call. Possible reasons include the number is switched off or not reachable, the number being invalid, transient connection error, etc.

NOTE: In case of an outgoing call, for all purposes, Leg1Status and Leg2Status will determine all scenarios to find out what happened with a call. 'Status' is not really relevant to be used for practical purposes and is present due to archaic (backward compatibility) reasons

Points to remember

- In the Call details API, we have the Leg1Status and Leg2Status that denote the statuses of those specific legs, in a particular call
 - Here, you would also find an additional parameter called 'canceled', which would essentially indicate that 'the call was canceled while queued or ringing' i.e. during the call run
- Similarly, in the pass-thru applet, we have a 'DialCallStatus' that corresponds to Leg2Status
- Irrespective of the status, a call is charged based on the Leg1 or Leg2 (or both) having answered a call from an Exotel number (ExoPhone), at any given point in time
- Below are the reasons for Leg2 which can be N/A (empty/null):
 - No number is returned to dial out the 2nd leg of the call
 - The number is returned but before even Exotel starts dialing out, the 1st leg caller dropped the call

- If there is no Leg2 in the call flow

Glossary

Leg1Status	Status of the first leg of the call. Can be one of • completed - The call was answered and has ended normally • busy - The caller received a busy signal • failed - The call could not be completed as dialed, most likely because the phone number was non-existent • no-answer - The call ended without being answered • canceled - The call was canceled while queued or ringing
Leg2Status	Status of the second leg of the call. Can be one of • completed - The call was answered and has ended normally • busy - The caller received a busy signal • no-answer - The call ended without being answered • failed - The call could not be completed as dialed, most likely because the phone number was non-existent • canceled - The call was canceled while queued or ringing

11.5. SMS Analytics

The SMS Analytics dashboard gives you a high-level overview of your SMS stats.

SMS Stats

Filters

- **All SMS:** Transactional High, Transactional, Transactional Opt-in, and Promotional
- **Date:** Filter by Start date and End date
- These filters apply to all graphs shown on this page

Total SMS

Total SMS are split into 3 categories.: Deliverable, Undeliverable and Pending.

- **Deliverable** = Delivered + Failed. These messages were either Delivered to the customer or Failed for some other reason
- **Undeliverable** messages could not be delivered due to DLT, DND, or other errors, which should be addressed before trying them again
- **Pending** messages are still in an intermediate state, and will convert to a final state over time

Deliverable SMS

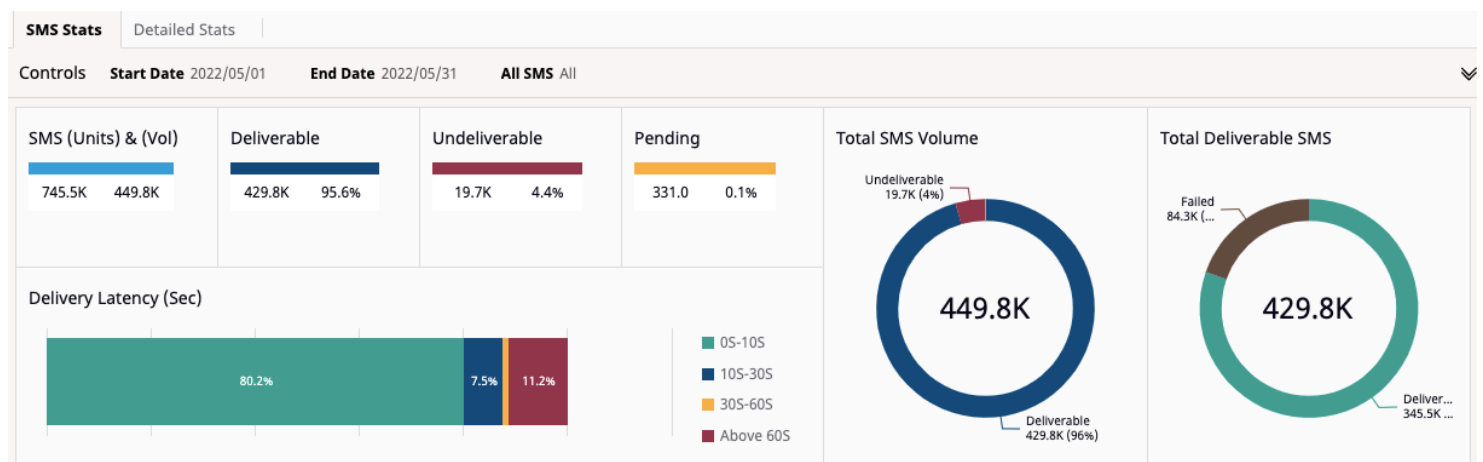
Deliverable SMS represents the SMS that did not have any DLT, DND, or other errors, and could be delivered to the customer

- Delivered
- Failed

Delivery Latency

Delivery Latency represents the time period over which SMSes are delivered

- Delivery Latency is not applicable to SMS Type = Promotional, as delivery reports are not available for promotional messages
- Promotional messages are excluded when computing Delivery Latency for SMS Type = All SMS

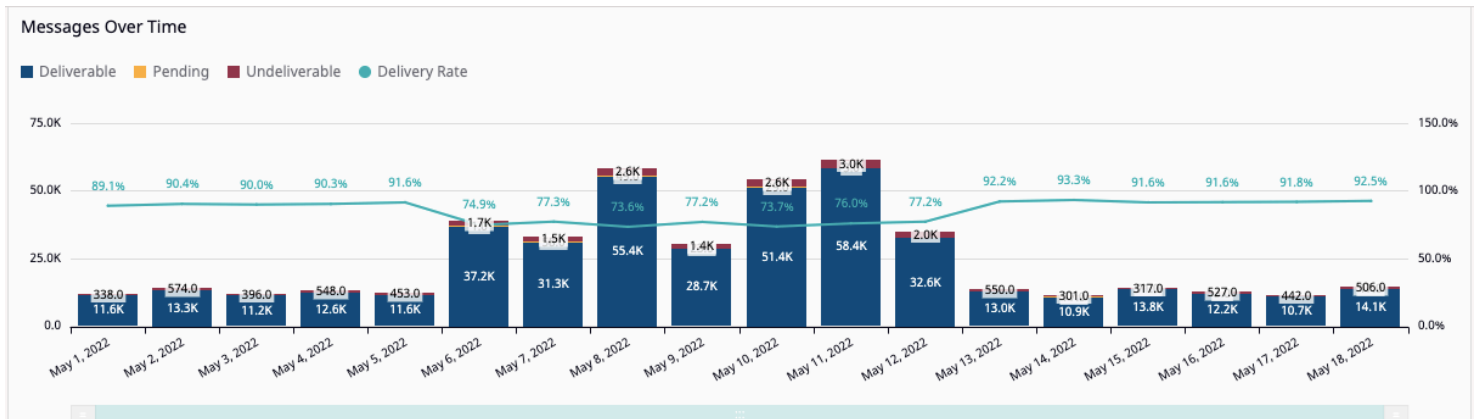


Messages over time:

The “Message over Time” bar graph shows how Total SMS Volume trends over time along with the Delivery Rate.

The date filter lets the user select a date range from

- Day-wise **Deliverable**, **Pending**, and **Undeliverable** messages are shown.
- Day wise Delivery Rate is shown



Reports can be downloaded in CSV format

Advanced Analytics

Call Details

SMS Details



Total SMS Stats

Shows detailed information on Deliverable, Undeliverable and Pending messages including

- Status
- SMS Count (Volume)
- % within each section and % of the total

Total SMS Stats

SMS Category	Status	Count	% of SMS Category
Deliverable	DELIVERED_TO_HANDSET	309.1K	71.03%
	DELIVERED_TO_OPERATOR	23.3K	5.36%
	FAILED_EXPIRED	8.3K	1.90%
	FAILED_HANDSET_ERROR	13.1K	3.02%
	FAILED_OPERATOR_ERROR	8.1K	1.86%
	FAILED_REJECTED	111.0	0.03%
	FAILED_SPAM_DETECTED	14.0	0.00%
	FAILED_SUBSCRIBER_ERROR	25.8K	5.93%
	FAILED_SUBSCRIBER_UNAVAILABLE	22.7K	5.21%
	FAILED_SYSTEM_ERROR	88.0	0.02%
	FAILED_UNAVAILABLE_ROUTE	522.0	0.12%
	FAILED_UNKNOWN_ERROR	4.5K	1.03%
	Subtotal	415.6K	95.50%
Undeliverable	DLT_LENGTH_EXCEEDED	1.5K	0.34%
	DLT_TEMPLATE_DOES_NOT_MATCH	10.0	0.00%
	DLT_TEMPLATE_ID_BLACKLISTED	14.0	0.00%
	DLT_TEMPLATE_NOT_FOUND	12.0	0.00%
	FAILED_DLT_CONSENT_ERROR	47.0	0.01%
	FAILED_DLT_SCRUBBING_ERROR	46.0	0.01%
	FAILED_INVALID_DESTINATION_NUMB...	3.9K	0.90%
	FAILED_INVALID_SENDER	599.0	0.14%
	FAILED_REJECTED_BY_OPERATOR	43.0	0.01%

Support

Reports can be downloaded in CSV and Excel formats
Columns can be sorted in the increasing or decreasing order of the values present

Status Codes

Status	Explanation	Status code
Delivered	Status = sent	20005: DELIVERED_TO_HANDSET 20006: DELIVERED_TO_OPERATOR
Failed	Error that the customer cannot do anything about on their own	Subscriber (retry) • 24105: FAILED_HANDSET_ERROR • 23035: FAILED_SUBSCRIBER_UNAVAILABLE • 24120: FAILED_SUBSCRIBER_ERROR Expired • 23050: FAILED_EXPIRED Other • 23015: FAILED_SPAM_DETECTED • 23030: FAILED_UNAVAILABLE_ROUTE • 23060: FAILED_REJECTED • 24010: FAILED_SYSTEM_ERROR • 24110: FAILED_OPERATOR_ERROR • 24990: FAILED_UNKNOWN_ERROR
Undeliverable	Error that the customer can act on	DLT • 23080: SENDER_BLOCKED_BY_DLT • 23081: ENTITY_BLOCKED_BY_DLT • 23082: TEMPLATE_BLOCKED_BY_DLT • 23083: FAILED_DLT_SCRUBBING_ERROR • 23084: FAILED_DLT_CONSENT_ERROR • 23181: DLT_TEMPLATE_ID_INVALID • 23182: DLT_TEMPLATE_NOT_FOUND • 23183: DLT_TEMPLATE_ID_INACTIVE • 23184: DLT_TEMPLATE_ID_BLACKLISTED • 23185: DLT_TEMPLATE_DOES_NOT_MATCH • 23186: DLT_LENGTH_EXCEEDED • 23281: DLT_ENTITY_NOT_FOUND Other • 23070: FAILED_INVALID_MESSAGE – could be DLT related in India • 23072: FAILED_INVALID_SENDER_ID – could be DLT related in India DND • 23005: FAILED_REJECTED_DND • 23020: FAILED_REJECTED_BLACKLIST Subscriber (do not retry) • 23010: FAILED_INVALID_DESTINATION_NUMBER

Status	Explanation	Status code
		23040: FAILED_SUBSCRIBER_UNKNOWN
Pending	Nature of detailed status code = intermediate	21010: PENDING_TO_OPERATOR 21015: SENDING_TO_OPERATOR 21020: PENDING_ON_OPERATOR

Total SMS Stats

SMS Category	Status	Count	% of SMS Category
☒ Deliverable		429.8K	95.55%
☒ Undeliverable		19.7K	4.37%
☒ Pending		331.0	0.07%

Total SMS Stats

SMS Category	Status	Count	% of SMS Category
☐ Deliverable	DELIVERED_TO_HANDSET	322.1K	71.62%
	DELIVERED_TO_OPERATOR	23.4K	5.19%
	FAILED_EXPIRED	8.3K	1.85%
	FAILED_HANDSET_ERROR	13.2K	2.93%
	FAILED_OPERATOR_ERROR	8.4K	1.87%
	FAILED_REJECTED	113.0	0.03%
	FAILED_SPAM_DETECTED	14.0	0.00%
	FAILED_SUBSCRIBER_ERROR	26.2K	5.82%
	FAILED_SUBSCRIBER_UNAVAILABLE	22.9K	5.10%
	FAILED_SYSTEM_ERROR	102.0	0.02%
	FAILED_UNAVAILABLE_ROUTE	526.0	0.12%
	FAILED_UNKNOWN_ERROR	4.5K	1.00%
	Subtotal	429.8K	95.55%
☒ Undeliverable		19.7K	4.37%
☒ Pending		331.0	0.07%

11.5.1. SMS Delivery Status

Note: The SMS Analytics dashboard is currently in its beta phase and has limited access.

- **Deliverable** = **Delivered** + **Failed**. These messages were either **Delivered** to the customer, or **Failed** for some other reason
- **Undeliverable** messages could not be delivered due to DLT, DND or other errors, which should be addressed before trying them again
- **Pending** messages are still in an intermediate state, and will convert to a final state over time

Category	Explanation	DetailedStatusCode: DetailedStatus
Delivered	Status = sent	20005: DELIVERED_TO_HANDSET 20006: DELIVERED_TO_OPERATOR
Failed	Status = failed	Subscriber related 24105: FAILED_HANDSET_ERROR 24120: FAILED_SUBSCRIBER_ERROR 23015: FAILED_SPAM_DETECTED 23035: FAILED_SUBSCRIBER_UNAVAILABLE Expired 23050: FAILED_EXPIRED Other 24110: FAILED_OPERATOR_ERROR 23030: FAILED_UNAVAILABLE_ROUTE 23060: FAILED_REJECTED 24010: FAILED_SYSTEM_ERROR 24990: FAILED_UNKNOWN_ERROR
Undeliverable	Status = failed or failed_dnd (DLT, DND or other errors, should be addressed before trying them again)	DLT 23080: SENDER_BLOCKED_BY_DLT 23081: ENTITY_BLOCKED_BY_DLT 23281: DLT_ENTITY_NOT_FOUND 23082: TEMPLATE_BLOCKED_BY_DLT 23181: DLT_TEMPLATE_ID_INVALID 23182: DLT_TEMPLATE_NOT_FOUND 23183: DLT_TEMPLATE_ID_INACTIVE 23184: DLT_TEMPLATE_ID_BLACKLISTED 23185: DLT_TEMPLATE_DOES_NOT_MATCH 23186: DLT_LENGTH_EXCEEDED 23083: FAILED_DLT_SCRUBBING_ERROR 23084: FAILED_DLT_CONSENT_ERROR Other (may be related to DLT in India) 23070: FAILED_INVALID_MESSAGE 23072: FAILED_INVALID_SENDER_ID DND

Category	Explanation	DetailedStatusCode: DetailedStatus
		23005: FAILED_REJECTED_DND 23020: FAILED_REJECTED_BLACKLIST Subscriber related (Customer can remove these numbers) 23010: FAILED_INVALID_DESTINATION_NUMBER 23040: FAILED_SUBSCRIBER_UNKNOWN
Pending	Status = queued, sending or submitted (still in an intermediate state)	21010: PENDING_TO_OPERATOR 21015: SENDING_TO_OPERATOR 21020: PENDING_ON_OPERATOR

Please refer to the **Mapping and Description of status codes** section of the SMS API documentation for more detail on what the errors mean.

11.6. SMS Reports



HTML & iframes are not visible in the CMS

For security reasons, iframe and HTML blocks are only rendered on your published documentation site, not in the Content Management System.

You can find your SMS reports in the 'Reports' tab under Admin

Reports Usage Users/Groups

Generate my **SMS** report type **SMS Detailed Report** report for **Yesterday** **Generate**

SMS Type **All SMS** Status of SMS **All SMS**

Report will have latest data upto 2 hours from the current time

REPORT	DOWNLOAD LINK
DLT Error Report for the period : 17 Mar 2023 21:00:00 to 27 Mar 2023 20:59:59 requested at 28 Mar 2023, 06:34:57	Download
DLT Error Report for the period : 28 Feb 2023 21:00:00 to 28 Mar 2023 04:04:50 requested at 28 Mar 2023, 06:34:50	Download
Daily DLT Error Report for Mon, 27 Mar 2023, 21:00:00 to 04:49:48 requested at 28 Mar 2023, 06:34:48	Download
Daily DLT Error Report for Sun, 26 Mar 2023, 21:00:00 to 20:59:59 requested at 28 Mar 2023, 06:33:36	Download
Daily DLT Error Report for the period : 28 Feb 2023 21:00:00 to 28 Mar 2023 03:41:32 requested at 28 Mar 2023, 06:11:33	Download
DLT Error Report for the period : 10 Mar 2023 21:00:00 to 27 Mar 2023 20:59:59 requested at 28 Mar 2023, 06:09:18	Download
DLT Error Report for the period : 28 Feb 2023 21:00:00 to 28 Mar 2023 03:39:08 requested at 28 Mar 2023, 06:09:09	Download
Daily DLT Error Report for Mon, 27 Mar 2023, 21:00:00 to 04:24:01 requested at 28 Mar 2023, 06:09:02	Download
Daily DLT Error Report for Sun, 26 Mar 2023, 21:00:00 to 20:59:59 requested at 28 Mar 2023, 06:08:08	Download
URL Shortening Report for the period : 31 Jan 2023 21:00:00 to 28 Feb 2023 20:59:59 requested at 27 Mar 2023, 21:51:08	Download
SMS Detailed Report for the period : 14 Mar 2023 21:00:00 to 17 Mar 2023 20:59:59 requested at 27 Mar 2023, 21:47:10	Download
URL Shortening Report for the period : 28 Feb 2023 21:00:00 to 27 Mar 2023 19:15:55 requested at 27 Mar 2023, 21:45:55	Download
Daily URL Shortening Report for Sat, 25 Mar 2023, 21:00:00 to 20:59:59 requested at 27 Mar 2023, 21:45:42	Download
Daily URL Shortening Report for Sun, 26 Mar 2023, 21:00:00 to 20:00:25 requested at 27 Mar 2023, 21:45:25	Download
URL Shortening Report for the period : 14 Mar 2023 21:00:00 to 17 Mar 2023 20:59:59 requested at 27 Mar 2023, 21:45:17	Download

Access Reports

There are 4 types of Reports that are available in the report type dropdown.

1. SMS Detailed Report
2. SMS Summary Report
3. DLT Error Report (Applicable for Indian accounts only)
4. URL Shortening Report

Reports are provided the facility to filter report queries on the basis of SMS type and SMS status.

Reports Usage Users/Groups

Generate my **SMS** report type **SMS Detailed Report** report for **Yesterday** **Generate**

SMS Type **All SMS** Status of SMS **All SMS**

Report will have latest data upto 2 hours from the current time

REPORT	DOWNLOAD LINK
URL Shortening Report for the period : 31 Jan 2023 21:00:00 to 28 Feb 2023 20:59:59 requested at 27 Mar 2023, 21:51:08	Download
SMS Detailed Report for the period : 14 Mar 2023 21:00:00 to 17 Mar 2023 20:59:59 requested at 27 Mar 2023, 21:47:10	Download

SMS types include:

- All
- Promotional
- Transactional
- Transactional opt-in

SMS status' include:

- All
- Sent
- Failed
- Failed DND

*** SMS Type and Filter is not applicable for DLT Error report*

SMS Detailed report

Field	Values	Comments
Id	Unique alphanumeric identifier of the SMS	
Direction	incoming / outbound-API	
Type	transactional / promotional	'Transactional' if the message matches a transactional template in your account
From	SMS Sender ID	LM-XXXXXX for outbound SMS and the sending number for inbound SMS
To	Number to which SMS was sent	
Body	Body of the message	
Status	sent / failed / failed-dnd / submitted	sent - All is well failed - Message was not sent failed-dnd - This happens when a promotional SMS is sent to a number in NCPR (DND list) submitted - This means that the SMS you have sent has been submitted from our system to SMS Gateway
Time	DD/MM/YY HH:MM: SS	
Price	In rupees	1 SMS unit = 160 characters.
Detailed StatusCode	The code of the Detailed SMS status	Refer to the table below for the possible values.
Detailed Status	The name of the Detailed SMS status	Refer to the table below for the possible values.
Date Sent	Sent time stamp DD/MM/YY HH:MM: SS	
Custom Field		
Number OfUnits		1 unit= 160 characters
EncodingType	Message type of SMS, can be of plain or unicode	Plain (for English) or Unicode (other languages)
DLTEntityId	The numeric identifier for the DLT platform in India is configured on the Exotel dashboard or passed in the API request.	NOTE: This column would only be populated if your Exotel account is domestic (India specific) If this is empty or incorrect, the DLT platform will fail your SMSes. You can configure this via Exotel Dashboard

Field	Values	Comments
		Settings (link)
DltTemp latelid	The numeric identifier for DLT Template in India as configured on Exotel dashboard or passed in the API request. A single quote (') would be added at the end to allow this to be readable in Excel.	NOTE: This column would only be populated if your Exotel account is domestic (India specific) If this is empty or incorrect, the DLT platform will fail your SMSes. Refer to this knowledge base to learn more on Template scrubbing compliance.

List of possible DetailedStatus and DetailedStatusCode

Detail edSta tusCo de	Nature of Detailed Status Code	Sta tus	DetailedSta tus	What it means
21010	Intermedi ate, may change in future	que ued	PENDING_T O_OPERAT OR	The message is being processed by Exotel.
21015	Intermedi ate, may change in future	sen din g	SENDING_T O_OPERAT OR	The message has been processed by Exotel and is en route to the operator.
21020	Intermedi ate, may change in future	sub mitt ed	PENDING_ ON_OPERA TOR	The message has been successfully submitted to the operator and is pending delivery. In India, Promotional SMS may be in this state if submitted outside the permitted time (10 AM to 9 PM IST).
2000 5	Final	sen t	DELIVERED _TO_HAND SET	We know with confidence that the message has been delivered to the recipient's handset.
2000 6	Final	sen t	DELIVERED _TO_OPERA TOR	The message has been delivered to the operator. In some regions and routes, handset delivery status (DELIVERED_TO_HANDSET) is not available and hence this is the best we can ever report about the delivery status.
2300 5	Final	faile d_d nd	FAILED_REJ ECTED_DN D	The message has been rejected as the end-user is a subscriber of DND (Do Not Disturb) services.
23010	Final	faile d	FAILED_INV ALID_DESTI NATION_N UMBER	The destination number is incorrect, not SMS-enabled, or is a PSTN landline.
23015	Final	faile d	FAILED_SP AM_DETEC TED	One of the most common reasons for SMS delivery failure is carrier-level spam filters. Carriers have added systems and algorithms that detect spam content and then block these messages. Unfortunately, these filters are hidden, subject to carrier preferences, vary from carrier to carrier, and can be changed without notice.
23020	Final	faile d	FAILED_REJ ECTED_BL ACKLIST	You tried to send a message to a blacklisted phone number. That is, the user has already sent a STOP/DND opt-out message and no longer wishes to receive messages from you.
2499 0	Final	faile d	FAILED_UN KNOWN_E RROR	Delivering your message failed for reasons that are unknown to us and to our carriers. If you notice too many of these cases, please reach out to us.
2303 0	Final	faile d	FAILED_UN AVAILABLE _ROUTE	The carrier and fallback carriers were not able to deliver the SMS message because no route was available.
23035	Final	faile d	FAILED_SU BSCRIBER_	This message was not delivered because the subscriber was temporarily unavailable. For example, the receiving handset was out of coverage or switched off. This is a temporary failure, but a message sent to the same subscriber at a later point in time may get delivered.

Detail edSta tusCo de	Nature of Detailed Status Code	Sta tus	DetailedSta tus	What it means
			UNAVAILAB LE	
2304 0	Final	faile d	FAILED_SU BSCRIBER_ UNKNOWN	Subscriber is unknown to the operators or no longer active.
2305 0	Final	faile d	FAILED_EX PIRED	The message was sent to the operator and may have been retried several times within the default network SMS expiration duration. The message request has now expired.
2306 0	Final	faile d	FAILED_REJ ECTED	For a number of reasons, the message was rejected by Exotel or the operator.
24105	Final	faile d	FAILED_HA NDSET_ER ROR	The message was not delivered to the subscriber due to handset failure
24110	Final	faile d	FAILED_OP ERATOR_E RROR	The message failed due to an issue at the operator's end
23070	Final	faile d	FAILED_INV ALID_MESS AGE	The message was rejected by the operator as Invalid. While Exotel will automatically split messages longer than 160 GSM 7-bit characters, or 70 Unicode 16-bit characters into multipart SMS, Messages exceeding the allowed character limit of 2000 characters may also end in this state. Any request error related to the message, say unidentified character, may also fall under this bucket. In India, if DLT-related parameters are not set like Entity ID, your SMS may fail with this error code.
23072	Final	faile d	FAILED_INV ALID_SEN D_ID	The message failed due to an invalid or unregistered Sender ID. In the case of India, if your Sender ID (header) is not registered with the operator DLT platform, you may receive this error.
24010	Final	faile d	FAILED_SY STEM_ERR OR	SMS failed while processing within the Exotel system.
24120	Final	faile d	FAILED_SU BSCRIBER_ ERROR	All subscriber or recipient issues that are unrelated to the handset (For eg - The receiver does not have enough mobile balance to receive the SMS) may fall under this bucket.
2308 0	Final	faile d	SENDER_B LOCKED_B Y_DLT	Applicable only for SMSes sent to Indian destination numbers via domestic lines. Sender ID (Header) is blocked or failed at DLT due to mismatch, non-registration, etc.
23081	Final	faile d	ENTITY.BL OCKED_BY _DLT	Applicable only for SMSes sent to Indian destination numbers via domestic lines. Entity (DLT Entity ID) is blocked or failed at DLT due to not being set, mismatch, etc.

Detail edSta tusCo de	Nature of Detailed Status Code	Sta tus	DetailedSta tus	What it means
23082	Final	faile d	TEMPLATE _BLOCKED _BY_DLT	Applicable only for SMSes sent to Indian destination numbers via domestic lines. Template (Template ID) is blocked or failed at DLT due to not being set, mismatch, non-registration, etc.
2308 3	Final	faile d	FAILED_DL T_SCRUBBI NG_ERROR	Applicable only for SMSes sent to Indian destination numbers via domestic lines. SMS is blocked or failed at DLT even after the registration due to explicit blocking of the Sender ID due to spam, issues with consent, or any other technical issues with the DLT platform.
2308 4- 2400 0	Final	faile d	RESERVED FOR FUTURE	These statuses will not be populated right now but are reserved for the future for any other detailed status scenario related to SMS.

SMS Summary report

SMS Summary report provides a high-level summary of the SMSs. It captures the number of units with delivery status and the total price of those units.

Field	Values	Comments
Date	timestamp (yyyy-mm-dd)	
Status	SMS delivery status It could be Submitted, Sent, Failed and Failed DND	
SMSType	transactional (OTP or Service Implicit content) transactional_opt_in (Service Explicit content) promotional (Promotional content with numeric header)	
ExoStatus	Detailed Status	
NumUnits	Number of SMS units	1 SMS Unit = 160 Characters
Price	Cumulative price of those smses	Price is calculated at the sms unit level
Count	Count of SMS	
Percentage	Count/(Total Count)	

DLT Error Report

DLT error report provides the details of DLT errors along with the TemplateID. You can check how many SMSs were delivered or Failed for a particular Template.

Errors will be shown only if Detailed Status / Total SMS with Template ID > 1%

Field	Values	Comments
Account SID	Account sid	
SMS Type	transactional (OTP or Service Implicit content) transactional_opt_in (Service Explicit content) promotional (Promotional content with numeric header)	
DLT Template ID	Content Template Id against the SMS body registered with DLT	
Template on Exotel	Template body	
Total SMS with Template ID	totalCount of SMS with the Template ID	
Total Delivered with Template ID	Total count of SMS Delivered with the Template ID	Delivered= DELIVERED_TO_HANDSET OR DELIVERED_TO_OPERATOR
DLT Error Type (Detailed Status)	Detailed Status	
SMS Count with DetailedStatus	Total count of undelivered SMS with the Template ID	Status = Failed or Failed DND Detailed Status will be one of the following- 'SENDER_BLOCKED_BY_DLT';'ENTITY_BLOCKED_BY_DLT';'TEMPLATE_BLOCKED_BY_DLT', 'FAILED_DLT_SCRUBBING_ERROR';'FAILED_DLT_CONSENT_ERROR';'DLT_TEMPLATE_ID_INVALID', 'DLT_TEMPLATE_NOT_FOUND';'DLT_TEMPLATE_ID_INACTIVE';'DLT_TEMPLATE_ID_BLACKLISTED', 'DLT_TEMPLATE_DOES_NOT_MATCH';'DLT_LENGTH_EXCEEDED', 'DLT_ENTITY_NOT_FOUND';'FAILED_INVALID_MESSAGE';'FAILED_INVALID_SENDER_ID'

URL shortening Report

Only applicable if you have used URL shortening service.

Field	Values	Comments
Id	Unique alphanumeric identifier of the SMS	
Direction	incoming / outbound-API	
Type	transactional / promotional	'Transactional' if the message matches a transactional template in your account
From	SMS Sender ID	LM-XXXXXX for outbound SMS and the sending number for inbound SMS
To	Number to which SMS was sent	
Body	Body of the message	
Status	sent / failed / failed-dnd / submitted	sent - All is well failed - Message was not sent failed-dnd - This happens when a promotional SMS is sent to a number in NCPR (DND list) submitted - This means that the SMS you have sent has been submitted from our system to SMS Gateway
Time	DD/MM/YY HH:MM: SS	
Price	In rupees	
Detailed StatusCode	The code of the Detailed SMS status	
Detailed Status	The name of the Detailed SMS status	
DateSent	Sent time stamp DD/MM/YY HH:MM: SS	
DLTEntityID	The numeric identifier for the DLT platform in India is configured on the Exotel dashboard or passed in the API request.	
DLTTemplateID	The numeric identifier for DLT Template in India as configured on Exotel dashboard or passed in the API request. A single quote (') would be added at the end to allow this to be readable in Excel.	

Field	Values	Comments
URL shortened	Yes	The report is applicable only if URL is shortened
URL clicked	Yes	The report is applicable only if URL is Clicked
CustomField		
NumberOfUnits	unit of SMS	1 SMS unit = 160 characters
Encoding Type	Message type of SMS, can be of plain or unicode	Plain (for English) or Unicode (other languages)
URL SID	unique id for shortened url	
Short URL	Shortened URL	
Short Code	Shortcode for URL	
Long URL	Original URL	
Tracking	True	
Expires At	Shortened url expiry time	
Created Time	Created time of shortened URL	
Last Viewed at	Last viewed time of the short URL	
Total Clicks	Total number of clicks on the short URL	
Country Code	Country code where the URL is clicked	

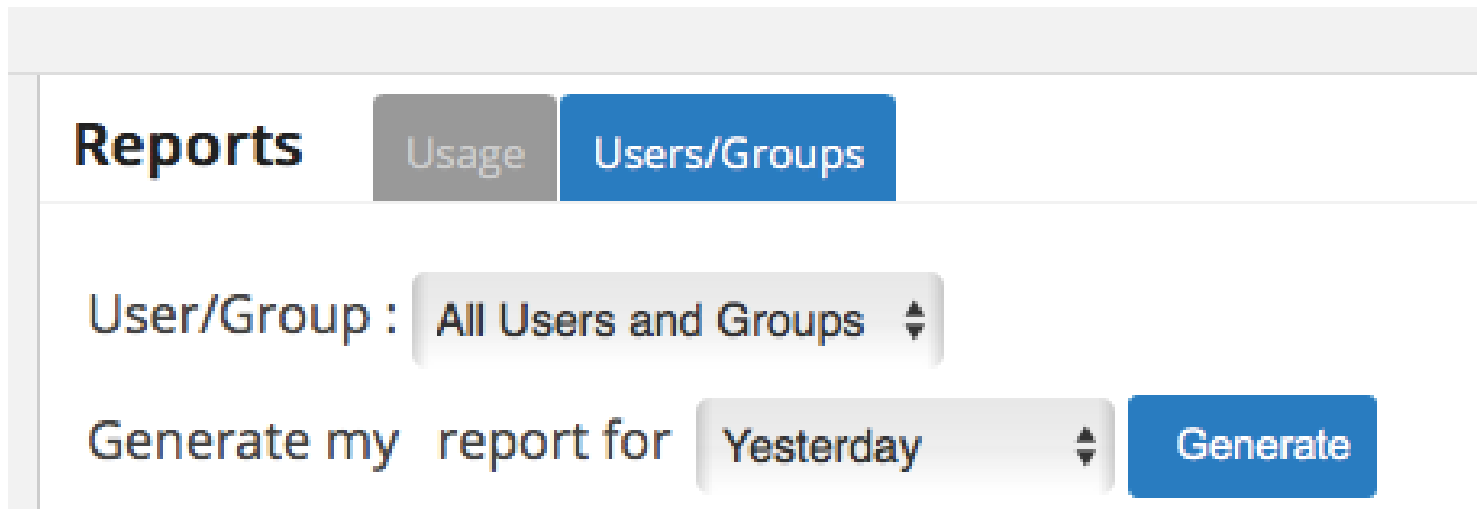
Field	Values	Comments
City	City name from where the URL is clicked	
Country	Name of the country	
IP Address	IP address of the device from where the URL is clicked	
Postal Code	Postal code of the area from where URL is clicked	
Region	State or province of the city	
Accuracy Radius	Accuracy radius in meters	
OS Version	OS version of the device from which the link is clicked	
OS Name	Name of the OS	
Device Name	Name of the device	

11.7. User/Group Report

Along with the Call/SMS report, We have included the feature of getting call details for any particular user or group. And this is how you can fetch the following details :

After you access the Report section under the Admin panel on the left-hand sidebar of the Exotel dashboard, when you check the option of User/Groups in the report as highlighted in the image below and select the corresponding duration for which you want the report and get the desired result.

This report would give you an overview of any group or a particular coworker.



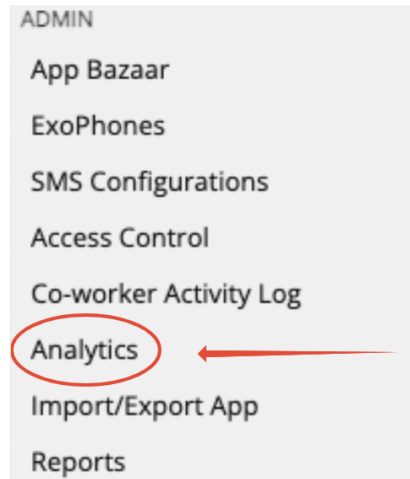
The screenshot shows the 'Reports' section of the Exotel dashboard. There are three tabs: 'Reports', 'Usage', and 'Users/Groups'. The 'Users/Groups' tab is selected. Below the tabs, there is a dropdown menu for 'User/Group' with the value 'All Users and Groups'. Below that, there is a label 'Generate my report for' followed by a date dropdown menu showing 'Yesterday'. To the right of the date dropdown is a blue button labeled 'Generate'.

Position	Field	Description (possible values)
1	AgentName	The Agent's name as per 'Co-workers and Groups'
2	AgentEmail	The Agent's email as per 'Co-workers and Groups'
2	GroupName	The Group name that an agent belongs to, as per 'Co-workers and Groups'
3	IncomingCalls	Number of completed (incoming) calls attended
4	MissedCalls	This is the sum of 'NoAnswer', 'Busy' & 'Failed' calls that get routed to an agent
5	NoAnswer	The agent didn't pick up the call
6	Busy	The agent's number was busy or unreachable when we tried routing the call to them
7	Failed	Either the agent's number was temporarily out of order or Exotel's operator failed to have the call successfully route to said agent
8	OutgoingCalls	Number of completed (outgoing) calls triggered
9	TotalCallDurationInMinutes	Sum of the duration of both incoming and outgoing completed calls (in minutes)
10	AverageHandlingTimeInMinutes	Average time spent per completed call (in minutes)
11	DeviceOnPercent	Duration of time where the agent/user was switched-on over Exotel dashboard (in percentage)
12	DeviceOnHumanReadable	Duration of time where the agent/user was switched-on over Exotel dashboard (in Years, Months, Days, Hours, Minutes & Seconds)

The data sources & underlying logic used in the User/Group report for metrics calculation are different from the Live Call dashboard report. Please refer to the User/Group report for longer-dated range data. For today and yesterday's data please refer to the Live Call Dashboard report.

11.8. Agent On/Off Logs

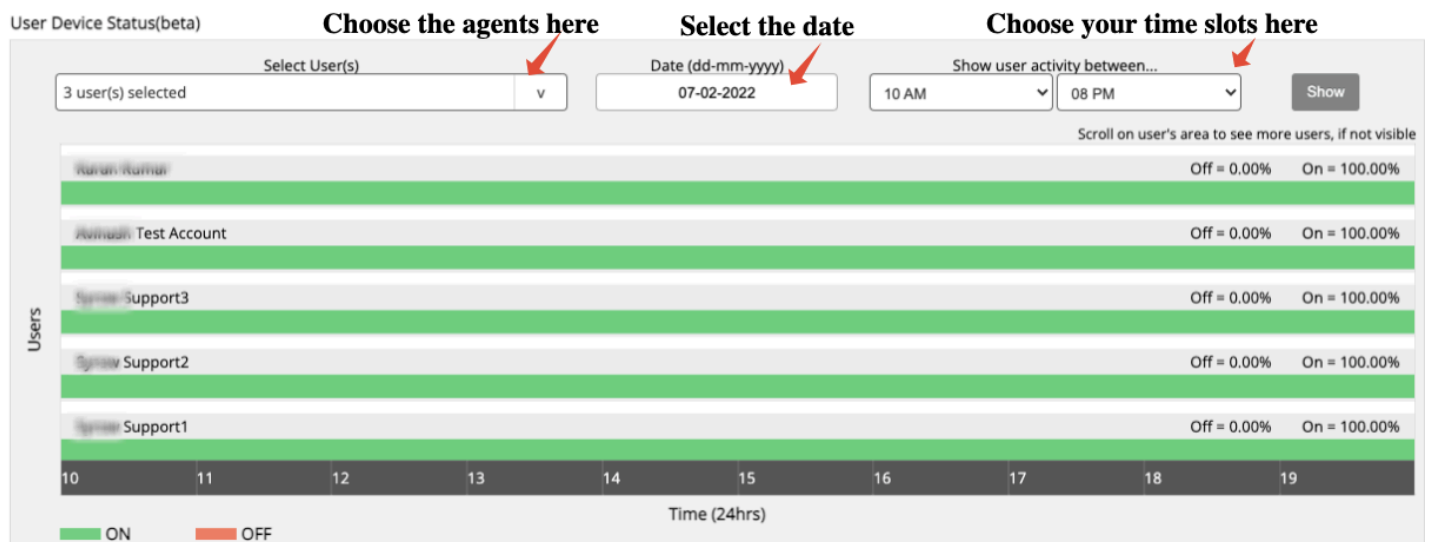
In this article, you'll learn how to use the **Analytics** feature in the Exotel Dashboard to track agent on/off time logs.



Steps to View Agent On/Off Logs

1. Click on the **Analytics** option from your Exotel Dashboard.
2. Choose the **Agent (Coworker)** you wish to view from the drop-down list.
3. Select the **date and time range** for which you want to view the data.

Analytics



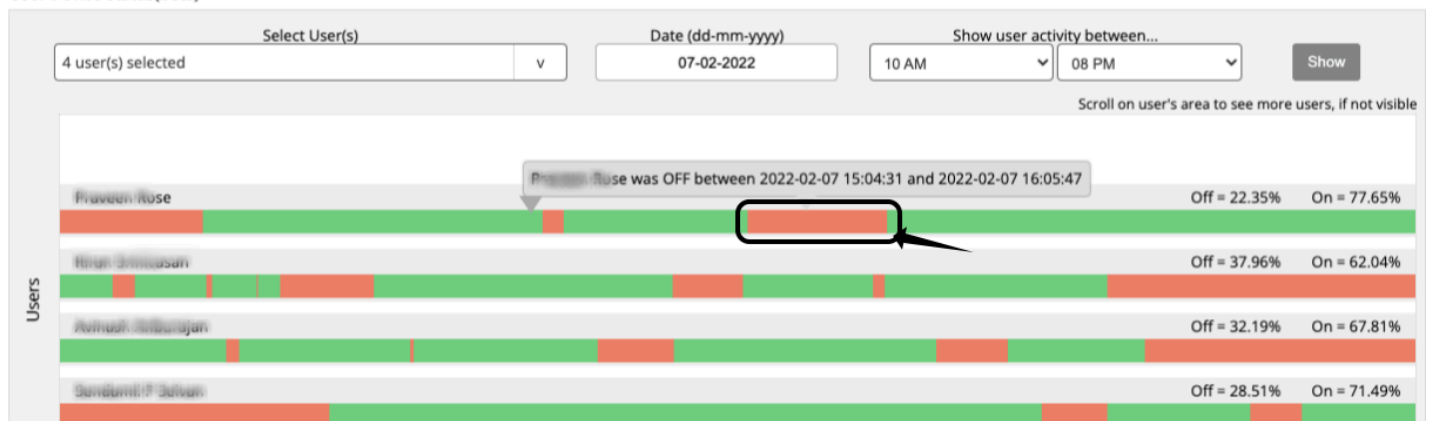
4. After entering all necessary details, **click on "Show:"**
5. The system will display a **bar chart**:



6. To view the **exact on/off timings**, hover your cursor over the orange section of the chart.

You'll see the **From** and **To** time durations for the agent's toggle off/on activity.

User Device Status(beta)



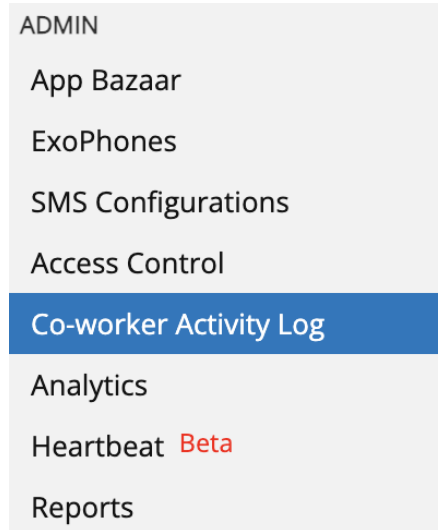
With the help of this feature, you can easily **track agent call availability** and **monitor break timings** accurately.

11.9. Coworker Activity Logs

The co-worker activity log, like the name suggests, helps you keep track of what your co-workers are up to.

It helps you stay on top of information like when a specific co-worker logged in to your Exotel account, when and who made changes in a custom call flow or made changes in the coworkers and groups section etc. This feature will help you monitor most of the activities happening in your Exotel account.

To find this feature, please log in to your Exotel dashboard, navigate to "Admin" and click on the "Co-worker Activity Log" tab on the left.



Note : Currently, we do not support the download/Export option of the data available on this section. However, if you are looking for the user toggle off and on duration which should help you in assess the total login duration of an employee, our team can provide that to you. Please write to hello@exotel.in with your request or call us at +91 8088919888.

11.10. Live Stats: Co-workers and Groups

This feature is available only on demand to select customers and might be chargeable. Please contact your account manager or please connect with us using the chat widget on your Exotel Dashboard or Whatsapp us on 08088919888.

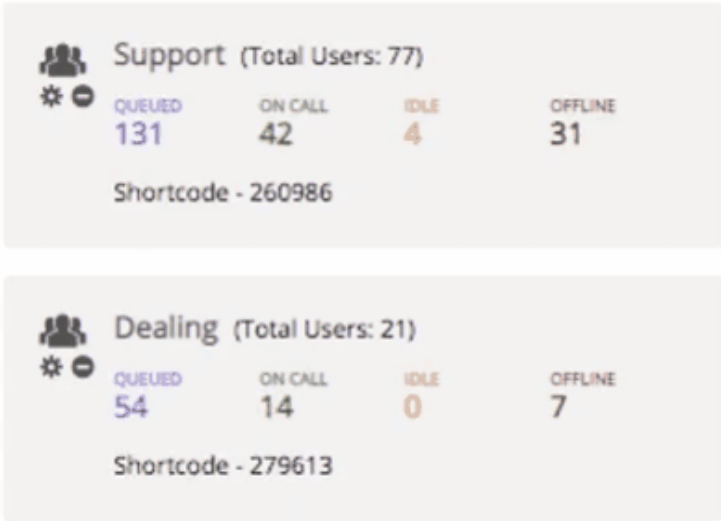
Live Stats will be added to the 'Co-workers & groups', where you can view the real-time stats of your ongoing calls and users at both group & account level.

This will help you have the answer to the questions such as :

- How many users in my 'Support Group' are currently handling customer calls?
- How many users are currently offline in the whole team as of now?
- How many callers are in the queue?

Account Level - Live Stats

This section helps you to view the real-time updates (every 6 seconds) on the Count of each Status for all the users in the account.



The following are the definitions of each users status count :

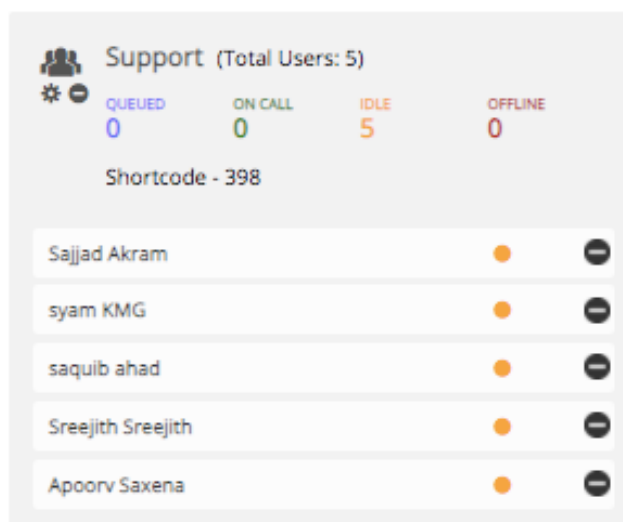
Live Stats (Total Users)	This is the total number of users in the account including verified & unverified users.
QUEUED	This indicates the total number of calls in the queued state. Only applicable if 'Queuing' is enabled in the Connect Applet of your call flow.
ON CALL	This is the total number of users in the account (excluding unverified users) with the current state as Device - ON & Status - ON CALL
IDLE	This is the total number of users in the account (excluding unverified users) with the current state as Device - ON & Status - IDLE
OFFLINE	This is the total number of users in the account (excluding unverified users) with the current state as Device - OFF.

Group Level - Live Stats

This section helps you to view the real-time updates (every 6 seconds) on the Stats for all the users in the group.

Groups

Select a group to view the user list.



The following are the definitions of each users status count :

Total Users	This is the total number of users in the group including verified & unverified users.
QUEUED	This indicates the total number of calls in the queued state for that group. Only applicable if 'Queuing' is enabled in the Connect Applet of your call flow.
ON CALL	This is the total number of users in the group (excluding unverified users) with the current state as Device - ON & Status - ON CALL
IDLE	This is the total number of users in the group (excluding unverified users) with the current state as Device - ON & Status - IDLE
OFFLINE	This is the total number of users in the group (excluding unverified users) with the current state as Device - OFF & Status - any status.

NOTE: The color coding against each user's name indicates which user is 'ON CALL' (green), 'IDLE' (yellow), and 'OFFLINE' (red).

11.11. How can I segregate reports per Agent/Group?

In order to get group/agent wise reports:-

Step 1: Download the report

1. Please login into your Exotel account
2. On the left panel, under the ADMIN section, you will notice **Reports tab**
3. Please click on the "**Reports**" tab
4. Generate the report by choosing the options either "**Call/SMS**" depending upon your requirement
5. The report is generated as a CSV file

Reports Usage Users/Groups

Generate my Call report for Yesterday Generate

Exotel Number All

LATEST DOWNLOADED DAILY REPORTS	DOWNLOAD LINK
Daily Call Report for Sat, 12 Mar 2022, 00:00:00 to 07:51:21	Download
Call Report for the period : 01 Dec 2021 00:00:00 to 28 Dec 2021 23:59:59	Download

6. Open the CSV file
7. In headers you will find the below options

Id
Direction
Type
ExotelNumber
From
FromName
To
ToName
Status
StartTime
EndTime
Direction
Price
RecordingUrl
Price Details
GroupName
FromCircle
To Circle
Leg1 Status
Leg2 Status
ConversationDuration
AppID
AppName
Digits
DisconnectedBy

Step 2: Use Excel/Google Sheet for create Co-worker/Group wise report

1. You can now Select the data by performing “Ctrl+A” and choose insert on top of the CSV / Excel sheet,
2. Select Pivot table and click “ok”
3. You will now be redirected to the pivot table page “new sheet” and the above headers are populated in the pivot table fields, depending upon the necessity you can design & view the report
4. Ex: In this case, you would like to view reports for sales & Customer Support option – (The groups you have created in co-workers & groups)
5. Return to the CSV/Excel, in the pivot table sheet, please select “Group name” from the Pivot table fields and drag-drop that in “Rows” & “Columns”
6. You will now the report in the below style

Row Labels	Count of GroupName
Sales	703
Support	5138
(blank)	
Grand Total	5841

7. The above report indicates that Sales has received 703 calls and Support has received 5138 calls

8. Similarly if you would like to further refine the report on agent-based, please select “ToName” from the Pivot table fields and drag-drop that in “**filters**”. Thereby you can view the below report

ToName	Dinesh Singh
Row Labels	Count of GroupName
Sales	75
Grand Total	75

11.2. How can I access my old reports?

You can access your old reports by going to the "Reports" tab on the right panel. You can then set the dates you want the report for and even filter it for a particular ExoPhone.

The screenshot shows the exotel web interface. On the left is a sidebar with navigation options: LIVE, Dashboard Beta, CALLS, Inbox, SMS, Outbox, TOOLS, Campaigns, CONTACTS, Address book, Co-workers and Groups, ADMIN, App Bazaar, ExoPhones, SMS Configurations, Access Control, Co-worker Activity Log, Analytics, Heartbeat Beta, and Reports (highlighted with a red box). The main content area is titled 'Reports' and has two tabs: 'Usage' (selected) and 'Users/Groups'. Below the tabs, there's a form to generate a report. It includes a dropdown for 'Generate my' (set to 'Call'), a dropdown for 'report for' (set to 'Custom dates'), and two date input fields (both set to '2021-06-29'). A 'Generate' button is to the right. Below this, there's a dropdown for 'Exotel Number' (set to 'All'). A table titled 'LATEST DOWNLOADED DAILY REPORTS' lists various reports with their corresponding 'DOWNLOAD LINK' (a 'Download' button). The 'Reports' tab in the sidebar is highlighted with a red box.

When the report gets generated, we will send you an email intimating you about it

The screenshot shows the exotel web interface after a report generation request. A yellow banner at the top of the main content area displays the message: 'The report request has been enqueued! We will intimate you via email when it's ready'. The 'Generate my report' section now shows 'Generate my' set to 'SMS' and 'report for' set to 'Yesterday'. The 'Exotel Number' dropdown is still set to 'All'. The 'LATEST DOWNLOADED DAILY REPORTS' table now shows a single report: 'Daily Call Report for Tue, 29-06-2021' with a 'Download' button. A red box highlights the report entry in the table.

You can also use the link below to quickly access the reports section.

<https://my.exotel.com/reports#usage>

We usually keep reports for **upto 6 months** prior to the current date. When generating the reports for previous months you can select the date range up to 1 month at a time to ensure there is not much load on fetching the data. Please note the time for generating the report depends on the size of the data or the number of calls or SMSes. Hence we recommend you to download the report in batches to access them swiftly.

11.13. Excel Macros and Exotel Reports

Get Leg1 & Leg2 Duration from Exotel Call Reports

If you regularly analyze Exotel call reports in Excel, you can automate extraction of Leg1 and Leg2 durations using a VBA macro. Below are prerequisites, a short explanation of the data, step-by-step instructions to import and run the macro, and the macro source code.

Prerequisites

Windows

- Excel with the **Developer** tab enabled.
(Macros and VBA tools are on the Developer tab, which is hidden by default – see “Show the Developer tab” in Microsoft Office help.)

Mac

- Make the **Developer** tab visible:
 - Go to **Excel** → **Preferences...** → **Ribbon & Toolbar**.
 - In **Customize the Ribbon**, check **Developer** and click **Save**.

About Leg1 & Leg2 Duration

Call reports downloaded from the Exotel dashboard include a PriceDetails field that contains an array. That array can include Duration values (in seconds) for:

- Leg1** – the From number (outgoing leg)
- Leg2** – the To number (incoming leg)

Note: for a completed incoming call, you will typically see only **Leg2** duration.

Quick Setup: Run the Macro

- Download LegDuration.bas.
- In Excel, open the **Developer** tab and click **Visual Basic**.
- In the VBA editor: **File** → **Import File...**, and choose LegDuration.bas.
- Return to your Exotel call report worksheet.
- Click **Macros**, select LegDuration, and click **Run**.

Note: The macro was created and optimised for Microsoft Office 2016. It is expected to work on newer versions, but Exotel does not provide troubleshooting support for local macro errors – feel free to inspect or modify the source if needed.

VBA Macro Source (LegDuration.bas)

```
Sub LegDuration()  
    ' LegDuration Macro  
    ' Keyboard Shortcut: Ctrl+Shift+L  
  
    Columns("O:O").Select  
    Selection.Copy  
    Columns("S:S").Select
```



```

ActiveSheet.Paste
Application.CutCopyMode = False

Columns("S:S").Select
Selection.Replace What:="Divert", Replacement:="Exc", LookAt:=xlPart, _
    SearchOrder:=xlByRows, MatchCase:=False

Selection.TextToColumns Destination:=Range("S1"), DataType:=xlDelimited, _
    TextQualifier:=xlDoubleQuote, ConsecutiveDelimiter:=False, Tab:=True, _
    Semicolon:=True, Comma:=False, Space:=False, Other:=False, FieldInfo _
    :=Array(Array(1, 1), Array(2, 1), Array(3, 1), Array(4, 1), Array(5, 1)), _
    TrailingMinusNumbers:=True

Columns("T:T").Select
Selection.Delete Shift:=xlToLeft
Columns("U:U").Select
Selection.Delete Shift:=xlToLeft
Selection.Delete Shift:=xlToLeft

Range("S1").Select
Selection.AutoFilter

sheetName = Worksheets(1).Name
Set sht = Worksheets(sheetName)
Set StartCell = Range("R3")
LastRow = sht.Cells(sht.Rows.Count, StartCell.Column).End(xlUp).Row
LastColumn = sht.Cells(StartCell.Row, sht.Columns.Count).End(xlToLeft).Column

ActiveSheet.Range("$A$1:$T$" & CStr(LastRow)).AutoFilter Field:=19, Criteria1:="<>*Leg1*"
Range("T1").Select
Application.CutCopyMode = False
ActiveCell.FormulaR1C1 = "=RC[-1]"
Range("R1").Select
Selection.End(xlDown).Select
Range("T" & CStr(LastRow)).Select
Range("T1:T" & CStr(LastRow)).Select
Range("T" & CStr(LastRow)).Activate
Selection.FillDown
Range("T1").Select
Selection.AutoFilter

Columns("T:T").Select
Selection.Copy
Selection.PasteSpecial Paste:=xlPasteValues, Operation:=xlNone, SkipBlanks _
    :=False, Transpose:=False

Range("S1").Select
Application.CutCopyMode = False
Selection.AutoFilter

ActiveSheet.Range("$A$1:$T$" & CStr(LastRow)).AutoFilter Field:=19, Criteria1:="<>*Leg1*"
Range("S2").Select
Range(Selection, Selection.End(xlDown)).Select
Selection.ClearContents
Selection.End(xlUp).Select
Selection.AutoFilter

Columns("S:T").Select
Selection.Replace What:="N/A", Replacement:="", LookAt:=xlPart, _
    SearchOrder:=xlByRows, MatchCase:=False

Columns("S:S").Select
Selection.Cut
Range("U1").Select
ActiveSheet.Paste
Columns("S:S").Select

```

```

Selection.Delete Shift:=xlToLeft

Columns("T:T").Select
Selection.TextToColumns Destination:=Range("T1"), DataType:=xlDelimited, _
    TextQualifier:=xlDoubleQuote, ConsecutiveDelimiter:=False, Tab:=True, _
    Semicolon:=False, Comma:=False, Space:=False, Other:=True, OtherChar _
    :="D", FieldInfo:=Array(Array(1, 1), Array(2, 1)), TrailingMinusNumbers:=True

Columns("U:U").Select
Selection.TextToColumns Destination:=Range("U1"), DataType:=xlDelimited, _
    TextQualifier:=xlDoubleQuote, ConsecutiveDelimiter:=False, Tab:=True, _
    Semicolon:=False, Comma:=False, Space:=False, Other:=True, OtherChar _
    :="=", FieldInfo:=Array(Array(1, 1), Array(2, 1)), TrailingMinusNumbers:=True

Columns("V:V").Select
Selection.TextToColumns Destination:=Range("V1"), DataType:=xlDelimited, _
    TextQualifier:=xlDoubleQuote, ConsecutiveDelimiter:=False, Tab:=True, _
    Semicolon:=False, Comma:=False, Space:=False, Other:=True, OtherChar _
    :="s", FieldInfo:=Array(Array(1, 1), Array(2, 1)), TrailingMinusNumbers:=True

Columns("T:T").Select
Selection.Delete Shift:=xlToLeft
Selection.Delete Shift:=xlToLeft

Range("T1").Select
ActiveCell.FormulaR1C1 = "Leg1"
Columns("S:S").Select
Selection.Insert Shift:=xlToRight, CopyOrigin:=xlFormatFromLeftOrAbove

Columns("U:U").Select
Selection.Cut
Range("S1").Select
ActiveSheet.Paste

Columns("T:T").Select
Selection.TextToColumns Destination:=Range("T1"), DataType:=xlDelimited, _
    TextQualifier:=xlDoubleQuote, ConsecutiveDelimiter:=False, Tab:=True, _
    Semicolon:=False, Comma:=False, Space:=False, Other:=True, OtherChar _
    :="D", FieldInfo:=Array(Array(1, 1), Array(2, 1)), TrailingMinusNumbers:=True

Columns("U:U").Select
Selection.TextToColumns Destination:=Range("U1"), DataType:=xlDelimited, _
    TextQualifier:=xlDoubleQuote, ConsecutiveDelimiter:=False, Tab:=True, _
    Semicolon:=False, Comma:=False, Space:=False, Other:=True, OtherChar _
    :="=", FieldInfo:=Array(Array(1, 1), Array(2, 1)), TrailingMinusNumbers:=True

Columns("V:V").Select
Selection.TextToColumns Destination:=Range("V1"), DataType:=xlDelimited, _
    TextQualifier:=xlDoubleQuote, ConsecutiveDelimiter:=False, Tab:=True, _
    Semicolon:=False, Comma:=False, Space:=False, Other:=True, OtherChar _
    :="s", FieldInfo:=Array(Array(1, 1), Array(2, 1)), TrailingMinusNumbers:=True

Columns("T:U").Select
Selection.Delete Shift:=xlToLeft
Selection.End(xlUp).Select
ActiveCell.FormulaR1C1 = "Leg2"
Range("S1").Select
End Sub

```

Troubleshooting & Notes

- The macro assumes your Exotel call export layout has the PriceDetails (or equivalent) column in column **O**. Adjust column references in the macro if your export format differs.
- If you encounter errors, verify:

- The Developer tab is enabled and macros are allowed.
- The spreadsheet has data starting at row 1 and the expected columns.
- The Sheet1 name or ID references match your workbook (if integrating with Google Sheets scripts).
- This macro performs multiple text-to-columns and replace operations; always test on a copy of your report.

12. Compliance

12.1. Data Security

What is NDA?

One of the oldest and most commonly prepared agreements, a Non-Disclosure Agreement essentially brings confidence to two parties negotiating that one of the parties will not use the information shared confidentially to the disadvantage of the other side.

As the name suggests, is nothing more than a promise not to reveal any confidential information or the data that we acquire in the course of your relationship with Exotel.

We have a standard NDA which covers some of the below-listed points

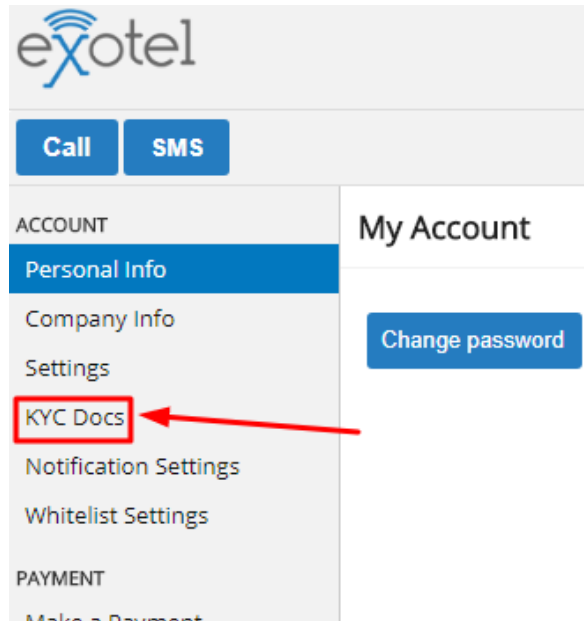
- Confidential Information
- Nondisclosure
- Return of Data information & timeline
- Exclusions- Terms
- No Rights Granted
- Warranty
- General Provisions

We are open to signing the NDA shared by our customers which we would like to review and come to common terms of the agreement and take it further. Signing this agreement will involve a one-time fixed Fee.

To know more information feel free to call us on 08088919888 or write to us at hello@exotel.in.

12.2. KYC Verification

You can upload your KYC documents by navigating to 'My account' and Then click on the 'KYC Docs' tab in the Sidenav



Company Info
Settings
KYC Docs
Notification Settings
Whitelist Settings
API Settings
PAYMENT
Make a Payment
Payment History
Bill Plan

Why all this fuss?

Telecom regulations in India obligate us to keep your KYC documents. [Learn More](#) about what documents you can submit. Make sure flash is installed and popups are not blocked

Your Account's KYC Status: **Incomplete**

DOCUMENT TYPE	FILE	STATUS	UPLOAD
Company PAN Card:	Not Submitted		Click to upload file (Max 10MB)
Certificate of Incorporation:	Not Submitted		Click to upload file (Max 10MB)
Company Address Proof:	Not Submitted		Click to upload file (Max 10MB)
Your Passport Size Photo:	Not Submitted		Click to upload file (Max 10MB)

Before you upload these documents, ensure that you have the correct company details on the Company Info page. The uploaded docs need to match with this company's details. Also - Bills and refunds, if any, will also be generated in the same company's name.

For Registered Companies

	Acceptable documents	Formats for upload
Certificate of Incorporation	- Company's certificate of incorporation (Private LTD or Nidhi LTD) - MSME Certificate - Real Estate Regulatory Authority [RERA] certificate (Registration certificate of real estate agent form) - DIPP or FSSAI (temporary)	png, gif, jpeg, pdf
PAN Card	Company PAN card	png, gif, jpeg, pdf
Address proof	- GST Registration certificate/MSME Registration certificate/Incorporation certificate - Postpaid Fixed line /broadband Bill - Electricity bill - Rental Agreement - Shared space contract - Import export license	png, gif, jpeg, pdf
Photo	Passport size photograph of one of the directors or authorized signatory.	png, gif, jpeg, pdf

For Partnership

	Acceptable documents	Formats for upload
Certificate of Incorporation	- Partnership deed - Certificate of incorporation [Limited Liability Partnership (LLP)] - MSME	png, gif, jpeg, pdf
PAN Card	Company's or Partner's PAN card	png, gif, jpeg, pdf
Address proof	- GST Registration certificate/MSME Registration certificate/Incorporation certificate - Postpaid Fixed line /broadband Bill - Electricity bill - Rental Agreement - Shared space contract - Import export license	png, gif, jpeg, pdf
Photo	Passport size photograph of one of the partners	png, gif, jpeg, pdf

For NGO, Trust & Societies

	Acceptable documents	Formats for upload
Certificate of Incorporation	- Trust deed (In Charitable Trust at least two people are required, there is no limit of maximum members) - Certificate of Registration Under Societies Registration Act (In society, a minimum of seven members are required to be the members) - Section 8 license - Trust deed under Registration Act, 1908	png, gif, jpeg, pdf
PAN Card	NGO, Trust or Society's PAN card	png, gif, jpeg, pdf
Address proof	- GST Registration certificate/MSME Registration certificate/Incorporation certificate - Postpaid Fixed line /broadband Bill - Electricity bill - Rental Agreement - Shared space contract	png, gif, jpeg, pdf
Photo	Passport size photograph of one of the members or authorized signatory.	png, gif, jpeg, pdf

For Sole Proprietorship

	Acceptable documents	Formats for upload
Certificate of Incorporation	- GST Registration certificate/MSME Registration certificate/Incorporation certificate - Shop establishment certificate (trade license) - FSSAI registration - Import export license - Form C - Note (Prior declaration is required if GST is not registered)	png, gif, jpeg, pdf
PAN Card	Proprietor's PAN card	png, gif, jpeg, pdf
Address proof of Proprietor	- Aadhar Card - Voter ID - Passport - Driving Licence	png, gif, jpeg, pdf
Photo	Passport size photograph of Proprietor.	png, gif, jpeg, pdf

Note (All the businesses supplying goods whose turnover exceeds INR 40 lakh in a financial year are required to register for GST. However, the threshold limit is INR 10 lakh if you have a business in the north-eastern states, J&K, Himachal Pradesh, and Uttarakhand.

12A or 80G certificate can't be accepted as address proof or incorporation certificate

For IP-PSTN intermix (Bangalore, AP and Mumbai only)

Due to regulatory requirements, you can only use IP-PSTN-based Exophones from the region where you have done your KYC. We are currently available in Bangalore, AP and Mumbai for this use case. Please reach out to your Account Manager to get this enabled. The following are the document requirements for IP-PSTN intermix:

Documents	Description	Formats for upload
Certificate of Incorporation	Incorporation certificate issued by Registrar of Companies	png, gif, jpeg, pdf
PAN card	Company PAN card	png, gif, jpeg, pdf
Address Proof in Company Name	- GST Registration certificate/MSME Registration certificate/Incorporation certificate - Postpaid Fixed line /broadband Bill - Electricity bill - Shared space contract - Import export license	png, gif, jpeg, pdf
Your Passport Size Photo	Self attested Proof of Identity (as mentioned in CAF)	png, gif, jpeg, pdf
Customer Acquisition Form (CAF)	A Customer Acquisition Form (CAF) is a document that serves as a record of the customer's application for the product or service and helps businesses verify the identity of the customer. This document is available to download from the dashboard under the KYC document section. To set up CAF, please reach out to your Account Manager	pdf

For UAE (Dubai only)

Documents	Formats for upload
Proof of Address	png, gif, jpeg, pdf
Trade License	png, gif, jpeg, pdf
Establishment Card	png, gif, jpeg, pdf
Emirate ID Card	png, gif, jpeg, pdf
Passport/Visa	png, gif, jpeg, pdf

For CCPL (Delhi only):

Partnership Firm (All documents need to be stamped and signed)	• Registration Certificate, Partnership Deed • An officially valid document in respect of the person holding a power of attorney to transact on its behalf. • Proof of identity & address of all the partners/beneficial owner - natural person if beneficial owners are non-individuals (owning 15% capital or entitled to 15% profit) • Address proof • GST registration certificate
Trust and foundation (All documents need to be stamped and signed)	• Certificate registration: Trust Deed an officially valid document in respect of the person holding a power of attorney to transact on its behalf Proof of identity and address of person like trustees, executors, administrators, etc. (beneficial owners -natural person) • GST registration certificate* • Any utility bill/Rent Agreement for the operating address • ID Proof of Authorised Signatory
Private Limited/Limited Co. (All documents need to be stamped and signed)	• PAN Proof of company • Any utility bill/Rent Agreement for the operating address • Certificate of incorporation • Articles & Association, CIN & MOA • GST registration certificate* • Declaration Certificate of Authorised Signatory in company letter Head signed by one of the Board Members (If the signing Authority is not Board of Member) • Valid Govt Issues ID proof, Aadhaar/Voter ID/Driving License/Passport
Individual Customer (Self Attested Document)	• Passport/ Identity card/ UIDAI(Aadhar Card) • PAN card/Driving License • Identity card with applicants photograph issued by public sector Undertakings, Scheduled - commercial banks, and Public Financial Institutions • Letter issued by a gazetted officer (with a duly attested photograph of the person, name current address, permanent address, nationality, and DOB of the customer) • Two passport size photographs

12.3. KYC Verification Indian Accounts

Introduction

Completing your business verification unlocks full access to the Exotel platform. The process takes less than 30 minutes for most businesses and is done entirely online – no paperwork, no office visits.

You will go through three simple steps: confirming your PAN, providing your business details, and nominating a person authorised to sign on behalf of your company. Once that person completes their part, your account is verified.

If at any point you get stuck, a **"Help Me Verify"** button is available throughout the process, and our onboarding team can step in within 24 hours.

Before You Start

Gather the following before you begin. Having everything ready avoids interruptions mid-way.

Your Business Type	Documents You'll Need
Private / Public Limited Company	PAN, GST number (if registered)
LLP	PAN, GST number (if registered)
Partnership Firm	PAN, Partnership Deed (PDF, JPG, or PNG, max 10 MB), GST number (if registered)
Sole Proprietorship / Individual	PAN, Business or Trade Certificate (PDF, JPG, or PNG, max 10 MB), GST number (if registered)
Trust, HUF, or Other Entity	PAN, Registration Certificate (PDF, JPG, or PNG, max 10 MB), any supporting documents, GST number (if registered)

For all business types, also keep handy:

- The name, phone number, or email address of your **Authorised Signatory** – the person with legal authority to sign on behalf of your business (e.g. a Director, Managing Partner, or Proprietor).

If you started the process earlier and didn't finish, click **"Continue from where you left off"** on the opening screen. Your previous entries are saved.

Step 1 of 3 – Confirm Your PAN

What happens: We verify your PAN with the Income Tax database and fetch your registered business name.

- On the opening screen, read the overview and click **"Start KYC"**.
- Enter your **10-character business PAN** (example format: AAAPL1234C).
- We will display the legal business name linked to that PAN.

If the name is correct, click **"Confirm & Proceed"**.

Common issues at this step:

Message You See	What It Means	What to Do
"Enter a valid 10-character PAN"	The format is incorrect	Re-check the PAN and re-enter it
"This PAN is inactive in tax records"	The PAN has been deactivated	Click " Help Me Verify "
"Tax verification service is temporarily unavailable"	Income Tax portal is down	See If a Service Is Temporarily Unavailable

Step 2 of 3 – Confirm Your Business Details

Your business type is automatically identified from your PAN – you do not need to select it. Find your section below.

Private or Public Limited Company

We automatically retrieve your company's registration details from the Ministry of Corporate Affairs (MCA), including your company name, registration number, date of incorporation, registered address, and directors.

Review the details – they cannot be edited here as they come directly from government records. Click "**Confirm & Proceed**".

Message You See	What to Do
"We couldn't retrieve your company details"	Click Retry. If it still fails, click "Help me verify"
"Your company is [inactive / struck off] in MCA records"	Click "Help me verify this company" – our team will assist you
"Company registry service is temporarily unavailable"	See If a Service Is Temporarily Unavailable

After confirming your company details, you will be asked to **select your GST number** – see [GST Selection](#) below.

LLP or Partnership Firm

LLP: Select "Limited Liability Partnership" to continue. We will retrieve your LLP details from the national registry. Review and click "**Confirm & Proceed**".

If we can't retrieve your LLP details, the same options apply as above – Retry or "Help me verify".

Partnership Firm: Select "Partnership Firm" to continue. You will be asked to upload your **Partnership Deed**.

- Upload as a PDF, JPG, or PNG (max 10 MB).
- We will scan the document to extract your firm name and registered address.
- The extracted details will be shown for you to review and correct if needed.
- Click "**Confirm & Proceed**" once the details look right.

After this step, you will be asked to **select your GST number** – see [GST Selection](#) below.

Sole Proprietorship or Individual

Upload your **Business or Trade Certificate** as a PDF, JPG, or PNG (max 10 MB).

We will scan the document to extract your business name and registered address. Review the extracted details, correct anything that looks wrong, and click "**Confirm & Proceed**".

Document scanning outcomes:

What Happens	What to Do
Details are filled in automatically	Review, edit if needed, and confirm
Scanning fails a second time	A form appears – enter your business name and address manually
Scanning is taking a long time	A "Enter details manually" hint will appear – click it to skip scanning
"File must be under 10 MB"	Compress or re-scan the document at a lower resolution
"Please upload a PDF, JPG, or PNG"	Convert the file to a supported format before uploading

After this step, you will be asked to **select your GST number** – see [GST Selection](#) below.

Trust, HUF, or Other Entity

You will upload your **registration certificate** (trust deed, society registration, etc.). The document scanning steps and outcomes are identical to those described for Sole Proprietorships above.

You will then be asked to upload **additional supporting documents** (such as a full trust deed or supplementary certificates).

- You can upload one or more files.
- At least one additional document is required.
- If an upload fails, an error message will appear – your other files are preserved, so just retry the failed upload.

GST Selection

We automatically retrieve your GST registration details using your PAN.

What You See	What to Do
A list of GST numbers	Select the GST number that applies to this account and click "Confirm & Proceed"
"No GST numbers found for this PAN"	Upload your GST exemption certificate
"GST verification service is temporarily unavailable"	Try again or help me verify and our team will contact you to help you with the business verification
"GST details look wrong?" link	Click it to request assistance from our team

Step 3 of 3 – Send the Verification Link

Your **Authorised Signatory** is the person who will complete the final identity check on behalf of your business – typically a Director, Partner, or Proprietor.

For Private/Public Limited Companies: Your directors are listed automatically (from MCA records).

For LLPs: Your partners are listed automatically. **For Sole Proprietorship or Individual :** The individual will be the Authorised Signatory

For all other business types: You will add the signatory manually

1. Find the right person in the list, or click **"Add different signatory"** to add someone new.
2. Click **"Send KYC"** next to their name.
3. Enter their **mobile number** and/or **email address** – at least one is required.
4. Click **"Send KYC Link"**.

A verification link is sent to them by SMS and/or email. They complete their part independently – they do not need to log in to your Exotel account.

Once sent, you will see a confirmation screen. Click **"Back to Dashboard"** to track the status.

If a Service Is Temporarily Unavailable

Government verification services (PAN, company registry, GST portal) are occasionally down for maintenance. When this happens, the same options are available at every affected step:

1. **Retry** – we attempt the check again. You can retry up to 3 times.
2. **"Notify me when it's fixed"** – opt in to receive an SMS and email once the service is restored, with a direct link to pick up exactly where you left off.

You do not need to restart the entire process – your progress is saved.

Your Verification Status

After sending the verification link, your dashboard shows your **Company Information** page with one of three statuses.

Verification Pending

Your Authorised Signatory has been sent the link but hasn't completed their step yet.

- **"Resend Link"** – resend the verification link if they haven't received it or need it again.

KYC Failed

Your Authorised Signatory completed the process but verification was rejected. The reason for rejection is shown on screen.

- Click **"Start KYC Again"** to correct and resubmit.
- The fields that caused the rejection are highlighted on the page.

Verified

Your verification is complete. Full platform access is now active.

- Your legal business details, signatory information, and operational preferences are displayed.
- You can update operational preferences (website, contact details, billing values) directly from this page.

If your TAN number is missing, an alert will appear. Click **"Add TAN"** to provide it – this affects billing and compliance.

Need Help?

If you hit a step where automated verification cannot proceed (for example, your company is listed as inactive in government records, or document scanning fails repeatedly), click the **"Help me verify"** button.

This notifies our onboarding team, who will reach out to you within **24 hours** at your registered email address to complete verification manually.

You can also click the **"Need help?"** button in the top navigation at any point during the process to open a support panel.

Common Mistakes to Avoid

1. **Using the wrong PAN.** The PAN must belong to the legal entity registered with Exotel. If the name shown after PAN verification doesn't match, stop and re-enter the correct PAN.
2. **Not having documents ready.** Partnership Firms need a Partnership Deed; Proprietorships and other entities need a Business Certificate. Gather documents before you start.
3. **Uploading the wrong document.** Each step asks for a specific document. Uploading an invoice, utility bill, or address proof instead of the requested certificate will cause an error.

4. **Not providing any contact details for the Authorised Signatory.** The verification link cannot be sent without at least a mobile number or email address.
5. **Leaving a failed KYC unaddressed.** A failed status does not resolve automatically. If you see "KYC Failed", click "Start KYC Again" as soon as possible to avoid access restrictions.
6. **Clicking "Restart KYC" without reading the warning.** Restarting clears everything – including auto-fetched company data and the signatory you already contacted. A confirmation message will warn you; read it carefully.

12.4. Calling Whitelisted Customer

What is a Whitelisted Customer?

A 'Whitelisted Customer' is a person who has called on your ExoPhone(s) at least once in the past 6 months. This has been put in place in order to ensure that both your company and Exotel abide by the regulations laid down by TRAI with regard to contacting the numbers registered in the NCPR(DND) numbers.

The customer 'whitelist' is the list of all customer numbers (as defined above). You can make transactional calls to all numbers in the 'whitelist'. This list may include numbers registered in the NCPR as well.

For Eg: If Mr. Rajni who is registered in the NCPR(DND registry) calls your ExoPhone(s) on Oct 1st, his number will be whitelisted till March 31st (6 months). This means you will be able to make transactional calls to him during this period. But from Apr 1st, you will not be able to call him unless he calls again to your number during that period.

Note: This process applies only to the numbers registered in the NCPR. You should be able to make transactional calls to customers who are not part of the NCPR registry without the whitelisting process.

What is the 'Do Not Call' list or NCPR (National Customer Preference Register)?

The NCPR aka Do Not Disturb registry is a national database containing a list of the mobile numbers of all the subscribers who have registered their preferences (by dialing or sending an SMS to 1909 or by registering using the TRAI DND mobile application) regarding receipt of unsolicited commercial communications. As per TRAI guidelines, companies are prohibited from making Unsolicited Commercial Communication to subscribers who have registered themselves in the NCPR. In short, 'Promotional Calls or SMSs' cannot be made or sent to the customers who have registered themselves in the NCPR.

If a person is NOT registered in the NCPR, you can choose to make a Transactional or a Promotional call to them.

For eg: If Mr. Rajni who is registered in the NCPR calls your Exotel number on October 1st, his number will be whitelisted till March 31st (6 months). This means you will be able to make transactional calls to him during this period. But from April 1st, you will not be able to call him unless he calls your number during that period.

But in the above example, if Mr. Rajni is not registered in the NCPR, you will be able to make a transactional call even after April 1st.

What kind of calls can I make to people who have registered in the NCPR and to people who have not?

- If a person is registered in the NCPR (National Customer Preference Register), you can only make 'Transactional' calls to them.
- If a person is NOT registered in the NCPR, you can choose to make a Transactional or a Promotional call to them.

Type of Call	In Whitelist?	Registered in NCPR	Not Registered in NCPR
Transactional	Whitelisted Customer	Call allowed	Call allowed
	Non-Whitelisted Number	Call not allowed	Call allowed
Promotional	Whitelisted Customer	Call not allowed	Call allowed
	Non-Whitelisted Number	Call not allowed	Call allowed

A 'Whitelisted Customer' is a person who has called or sent an SMS to your Exotel number(s) at least once in the past 6 months. This has been put in place in order for us to ensure that both your company and Exotel abide by the regulations laid down by the TRAI.

For eg: If Mr. Rajni who is registered in the NCPR calls your Exotel number on October 1st, his number will be whitelisted till March 31st (6 months). This means you will be able to make transactional calls to him during this period. But from April 1st, you will not be able to call him unless he calls your number during that period.

But in the above example, if Mr. Rajni is not registered in the NCPR, you will be able to make a transactional call even after April 1st.

What is the difference between a transactional call and a promotional call

An active "promotional" or "advertising" of a good or service is what is referred to as a "promotional call." Whether or not a call is placed to an existing customer (of the business), if it contains any promotional information, it qualifies as a promotional call. Additionally, promotional calls can only be made Monday through Saturday, including Sunday, from 9 AM to 9 PM.

Here are some examples of a promotional call:

- A call from a representative to a potential client: "Dear Sir, From BuyUsOrElse, this is Kumar. Would you mind giving us a few minutes of your time to tell you about our fascinating new product XYZ?"
- A representative phoned a current client: "Dear Mr. Kumar: You have been using our product for a while, therefore as a thank you for your patronage, we are giving you a discount on ABC, one of our newest products."

Any call that does not contain promotional content is considered a transactional call. A transactional call is any call that comprises information sent by a registered firm to its workers, agents, or customers regarding services or items that will be delivered to those customers. Transactional calls cannot be placed by businesses to individuals who are not current clients.

Here are some examples of a transactional call:

- A current client received a call from a taxi aggregator: "Dear Mr. Kumar: You have asked for a Tata Indica to pick you up at Indira Nagar at 5.30 PM. Could you please let us know if you will be bringing luggage? To confirm that your cab will arrive at your house at 5.15 PM, please phone the number provided. Thanks."
- An internet retailer made the following call to a client: "Dear Mr. Rajni: You had written to us to inquire on the status of your packages. We would like to let you know that they have been delivered by Quick-e couriers and that you have received an SMS with the tracking information."

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

Why am I not able to make a Promotional call to a J&K number?

As a safety and security precaution, Exotel does not allow bulk calls and promotional calls to numbers that belong to Jammu & Kashmir telecom circle. You can still make individual transactional calls to J&K numbers.

To understand more about this you can click on this link <http://www.jktpo.in/contact.html>

12.5. Transactional vs Promotional SMS

Transactional SMS

These are messages which are sent to your customer to pass on information necessary for using your product or service.

For example:

- A message sent by a bank to an account holder regarding his/her available account balance.
- A message sent to the client by a company regarding his Invoice amount.

Within Exotel a transactional message is one that confirms one of your approved Transactional message templates. For more information on how to configure your templates please check [Where do I create a Transactional SMS template and how do I get it approved?](#)

Examples of Transactional templates:

- "Your order no %d has been shipped. You will receive this order by %s. Thanks for using our services."
- "Thanks for participating in our missed call campaign to save nature. Your enrollment id is %d"

Note: %d is used to substitute numbers and %s is used to substitute alpha-numeric strings. While adding the template, you can now use [#var#] as a placeholder for replacing alphanumeric text similar to DLT. Alternatively, %s and %d are continued to be supported as well.

Promotional SMS

These are SMSes that are sent with the objective of promoting your product or service. This category includes any sales & marketing messages which may or may not be solicited by the recipient.

Promotional SMSes can be sent only from 9 AM to 9 PM and only to numbers that are not on the NDNC registry (DND numbers).

Examples of promotional SMS:

- Dear Travel Agents, Now Get Flat 10% Off on Flight (Basic Fare), Same has been updated on the portal. Login now and start booking!
- Dear %s, Our team wishes you a very Happy %s. We have mailed you a dining voucher at your address with a 20% discount on Food and Buffet..valid till %s. You can also show this SMS with voucher codes %s to avail it.

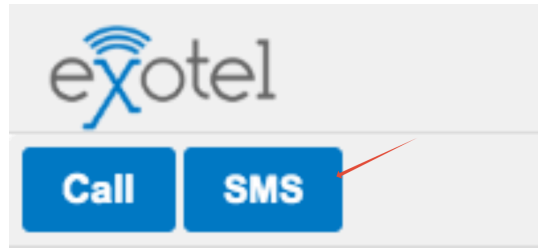
As a thumb rule, SMSes that have offers, coupons, etc can be considered promotional content.

As per the TRAI regulation for SMS in India, to be compliant with DLT scrubbing guidelines and send SMS using Exotel, you must register your entity in any of the DLT portals and get the templates approved. Promotional SMSs will not get delivered to the numbers on DND.

Test SMS Template for DND numbers

To check if an approved SMS template works as transactional:

1. Copy the template.
2. Click on the **SMS** button on the top left, beside the **Call** button on the Exotel dashboard.



3. Type in a DND number (check if that number is a DND number) and select the DLT approved sender ID (Header).

Send a text message ?

From

+911130018020 (LM-EXOTEL)

To

Eg: 9886012345, 98860123456 (max. 10 phone numbers)

Enter up to 10 numbers separated by comma

Type your message or [Choose a SMS Template](#)

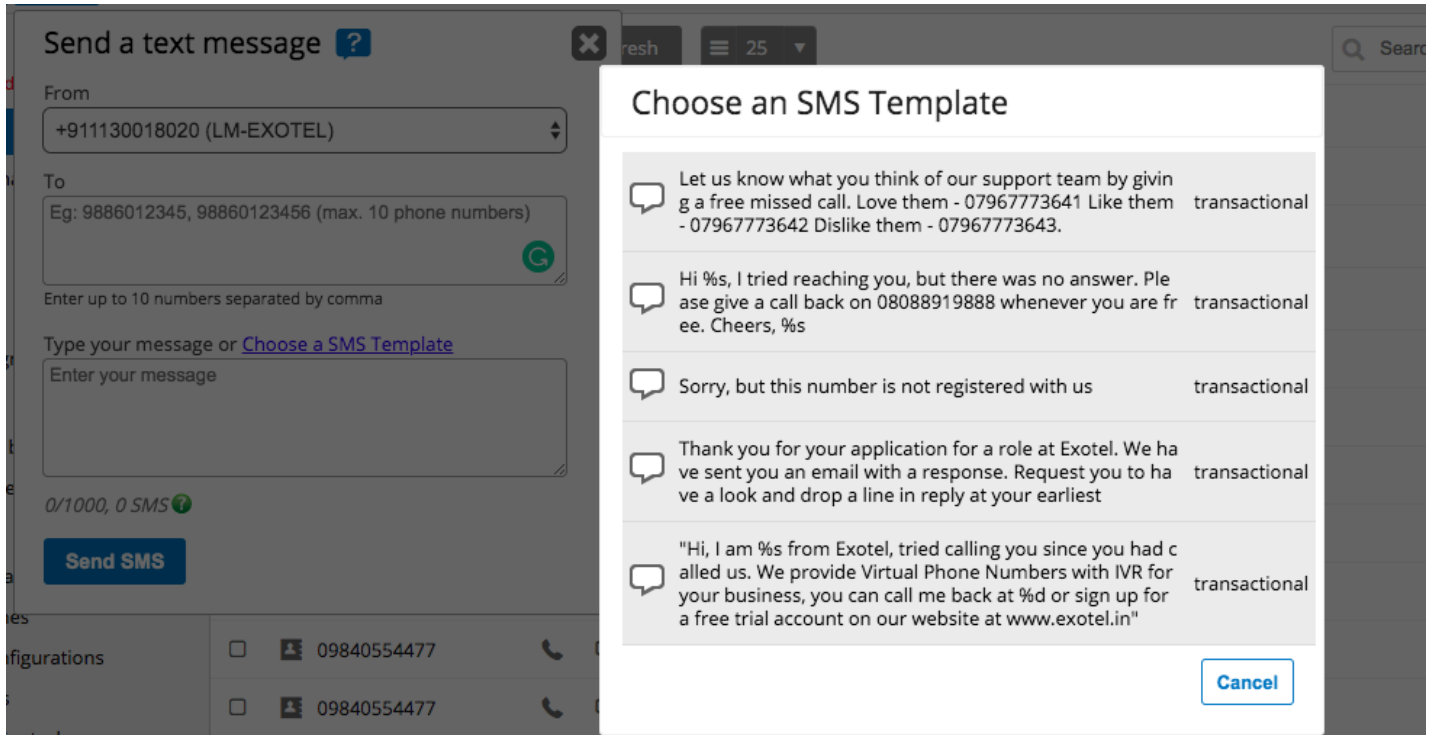
1. Paste the template in the SMS body or click **Choose an SMS template** and select the DLT approved template.

Type your message or [Choose a SMS Template](#)

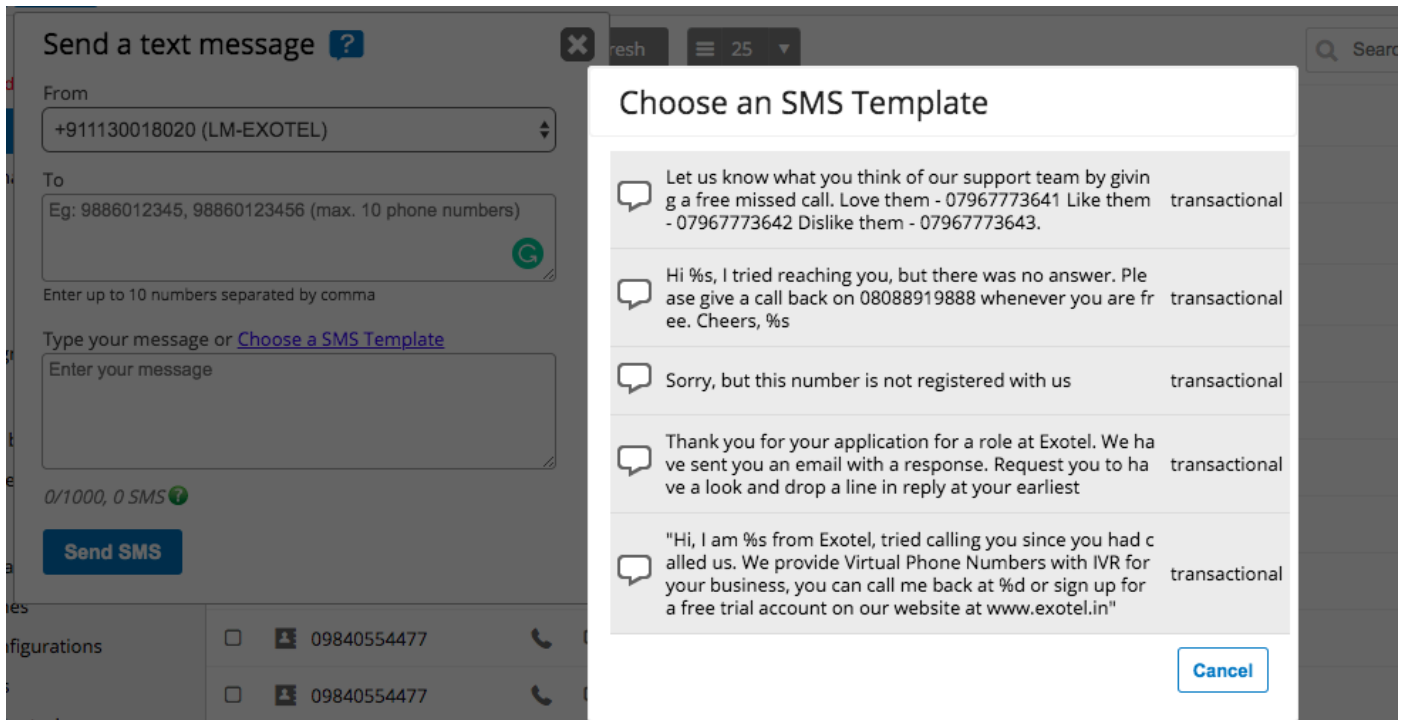
Enter your message

0/1000, 0 SMS ?

Send SMS



2. Replace all occurrences of %s or {%var#} (if any) with any set of alphanumeric characters, something like this: rg567kjb



3. Click **Send SMS**.

If the DND number receives the SMS, then the template is working fine as expected.

12.6. Regulatory Point of Contact

A regulatory contact point is a person or department authorised to communicate with Exotel on your behalf. This communication may include non-procedural/service-related issues.

These details should be entered into the Company Info section, as shown below: <https://my.exotel.com/cinfo>

Regulatory point of contact [What is this?](#)

☒ Same as [Super admin](#)

Email	:	regulatory@exotel.com
Mobile Number	:	9888878888

The regulatory contact point should be part of the organisation and will be in charge of relaying information throughout the organisation.

It is preferable to provide a group email address with at least two people. A phone number is the cell phone number of one of the people in this email group.

You can also use the Exotel account's Super Admin credentials. This person would be the point of contact for any Exotel Account issues.

If the government or law enforcement authorities make a request, we expect you to cooperate fully in resolving the issue as soon as possible. Typically, this entails producing documents as evidence. Our Terms of Use also state the following:

You will provide us with the e-mail address and phone co-ordinates of your employee/representative who will be responsible to co-ordinate with us for the purposes of this Agreement

How it works

Consider the following NDNC violation:

Business: ABC Insurance Pvt. Ltd.

Customer: Meena Sharma (Mobile: 98XXXXXX45)

Customer DND status: Registered under NDNC – Fully Blocked Category

Call placed by: A telesales agent from ABC Insurance (or automated outbound dialer via Exotel)

Call content:

"Good afternoon, Ma'am! I'm calling from ABC Insurance. We're offering a limited-time discount on new health insurance plans. Would you like to know more?"

At the time of writing this article, we each have 7 days to respond to the Operator with all necessary proofs.

For organising these types of documents, we will contact the email and phone number listed under the Regulatory point of contact.

12.7. Enable DND Calling

Proof of Customer Opt-in

We need to get a screenshot of a lead in your CRM or lead management system which should have captured the lead name, URL, phone number, and company name are visible. In the absence of a CRM screenshot, the regulators approve any of the below sample document

1. **Application hard copy**:- Subscription details to be clearly mentioned with name, phone number, and signature.
2. **Transaction slip**:- Invoice or payment slip which must not be older than 6 months & must contain either portal link (URL) or company name/logo along with customer details.
3. **Mail entries captured in SQL**

Once we have received the opt-in, It will flow through an internal approval process.

Letterhead Declaration

On your official letterhead (sample attached below), please mention:

"(Company Name), also known as (account sid which is available in API credentials section of Exotel dashboard), is using Exotel to make transactional calls to its registered users only. In case of any violation, (Company Name) will provide the opt-in proof within 24 hours. If the proof is not provided within 24 hours, Exotel reserves the right to disconnect the connections immediately without prior notice. (Company Name) agrees to the terms of service mentioned here: <https://exotel.com/terms-of-service-2018/>."

Website Terms & Conditions

Please include the below statement in your website's Terms & Conditions (optional):

"I agree and consent to receive all communications at the mobile number provided, even if this number is registered under the DND/NCPR list under TRAI regulations. For this purpose, I further authorize the Company to share/disclose the information to any third-party service provider, affiliates, group companies, their authorized agents, or third-party service providers."

12.8. NDNC Compliance Portal

Overview

To streamline the resolution of DND (Do Not Disturb) complaints and ensure regulatory compliance, we're excited to launch our new **NDND (National Do Not Disturb) Compliance Portal**.

This new platform is designed to simplify the process of handling DND-related issues, offering faster, more transparent, and accurate complaint resolution.

Key Benefits

- Faster DND complaint resolution
- Elimination of manual follow-ups via email
- Simplified and transparent workflow
- Improved compliance experience for your teams

What You Need to Know

- You will now receive **automated system notifications** via the NDND Compliance Portal for all DND-related cases.
- **Timely action is critical** – please respond to portal notifications promptly to remain compliant.
- **Transition Period (Next 1–2 weeks)**: You may receive both manual and automated emails. **Kindly respond only to the system-generated emails.**

Quick Start Resources

How the NDND Portal Works – Watch the Video here: <https://storage.pardot.com/825903/1748933167GyCezzRe/NDN.mp4>

Important Compliance Notes

- **Respond within 1–2 days**: It is mandatory to resolve and close complaints within 48 hours. After **3 days**, the complaint will be **automatically marked as valid**.
- **Non-compliance can lead to serious business impact**, including complete suspension of services by telecom operators.

What Constitutes Valid Proof?

When responding to a DND complaint, please ensure the submission includes the following:

1. **Customer Details**: Name and contact number of the complainant.
2. **Existing Relationship Evidence**:
 - Invoice
 - Service agreement
 - Transaction record
3. **Customer Consent**:
 - Must be explicit and documented
 - Consent must be **within the last 6 months**
4. **Consent Date**: Mention the date the consent was obtained.
5. **Call Recording** (if applicable): Especially for transactional or service calls.

6. Additional Supporting Documents (if relevant):

- OTP call logs
- Loan documents (for debt recovery)
- Order details or proof of delivery (for logistics communication)

--> See [**NDNC Compliance Portal FAQs**](#)

12.8.1. NDNC Compliance Portal FAQs

What is the purpose of the NDNC Complaint Tracker system?

The NDNC Complaint portal is to monitor, track, and resolve customer complaints and provide interface to customer to easily upload, check the status etc.

Who must comply with the TCCCPR regulations?

All registered Telemarketers (RTMs), Principal Entities (PEs) must comply with TCCCPR, 2018.

We are already using Exotel Closed DND – Why should we still provide proof

Use of non-140 numbers are allowed only for transaction and service calls. By providing proof, you are establishing that the call made was for service / transaction and not for promotional.

What happens when a complaint is filed against a Telemarketer?

The complaint is routed through DLT and informed to the Telemarketer. It is now important for telemarketers to provide the proof.

What is the required timeline for addressing a UCC complaint?

As per TCCCPR:

- Complaints must be **acknowledged within 24 hours**.
- Complaints must be **resolved within 3 business days** from the date of lodging.
Failure to comply can lead to penalties or disconnection.

What happens when a complaint is filed against a Telemarketer?

The complaint is routed through DLT and informed to the Telemarketer. It is now important for telemarketers to provide the proof

What happens if the proof is not provided.

- All complaints which are not justified with a proof are considered valid complaint and action is expected to be initiated on the Telemarketer.
- The action is warning with 15 days suspension for 1 violation and 1 year suspension of all telecom services for 1 year for the 2nd violation.

What is a good proof.

Good proof will establish that the customer reached out with explicit consent and the call/SMS was not promotional in nature. General guidelines below:

- Customer Information: Clearly show the customer's name and contact number.
- Proof of Existing Relationship: Documents such as invoice, service agreement, or transaction records.
- Customer Consent: Valid proof of explicit consent from the complainant within the last 6 months.
- Consent Date: Date when consent was provided.
- Call Recording: If available, include the recording of the transactional/service call.
- Additional Supporting Documents (if applicable) - OTP: Call Logs, Loan Documents for debt collection, Order Details & Proof of Delivery for logistics-related communication, etc. will help close the complaints.

Can Telemarketers view their performance and complaints trend?

Yes, the NDNC Complaint Tracker dashboard provides:

- Number and type of complaints.
- Complaint resolution status.

What should a Telemarketer do if they receive a false complaint?

Provide evidence of consent or customer opt-in.

How often should a Telemarketer check the NDNC portal?

Daily checks are recommended to ensure timely acknowledgment and resolution of complaints and to remain updated on compliance obligations.

If the complaints are very low – you can also check based on the mail sent out.

How many email ID can we add to a particular complaints (From Telemarketers perspective)

You can add 5 email ID

Emails are going to someone else in the company and not reaching the actual person who works on NDNC complaints.

Please reach out to our AD / CX and provide the email ID – They will list it as “DND Compliance” ID in our systems and for future cases, the mail will reach them.

For now, you can also forward the email and OTP to the relevant teams internally.

Can a new email ID be added to a complaint which is already shared with us.

No. The system does not allow updating the additional Email ID once the email are triggered. It can be done only for future complaints received by us.

How many proof can I add

You can add only one proof and upload it.

How can I add multiple snapshots to one complaint.

Create a PDF file with multiple snapshots and upload one single PDF file

What all files are supported.

PDF, GIF, PNG are supported. We recommend to use PDF for all cases if possible.

Will my sales account Manager (Exotel employee) has access to all my complaints.

Yes

I am not being taken to the password page at all when I enter my email ID

This is most likely due to your email ID not listed in any complaint.

Only email ID which are mapped to active complaints will lead to OTP page

Can I see old complaints

Yes

Where can I get more information on the TCCCPR 2018 regulation

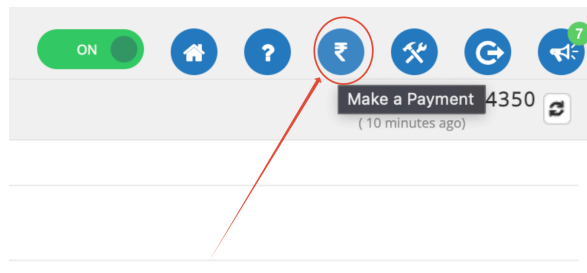
Please find the TRAI link - <https://traigov.in/tcccpr>

13. Billing and Payments

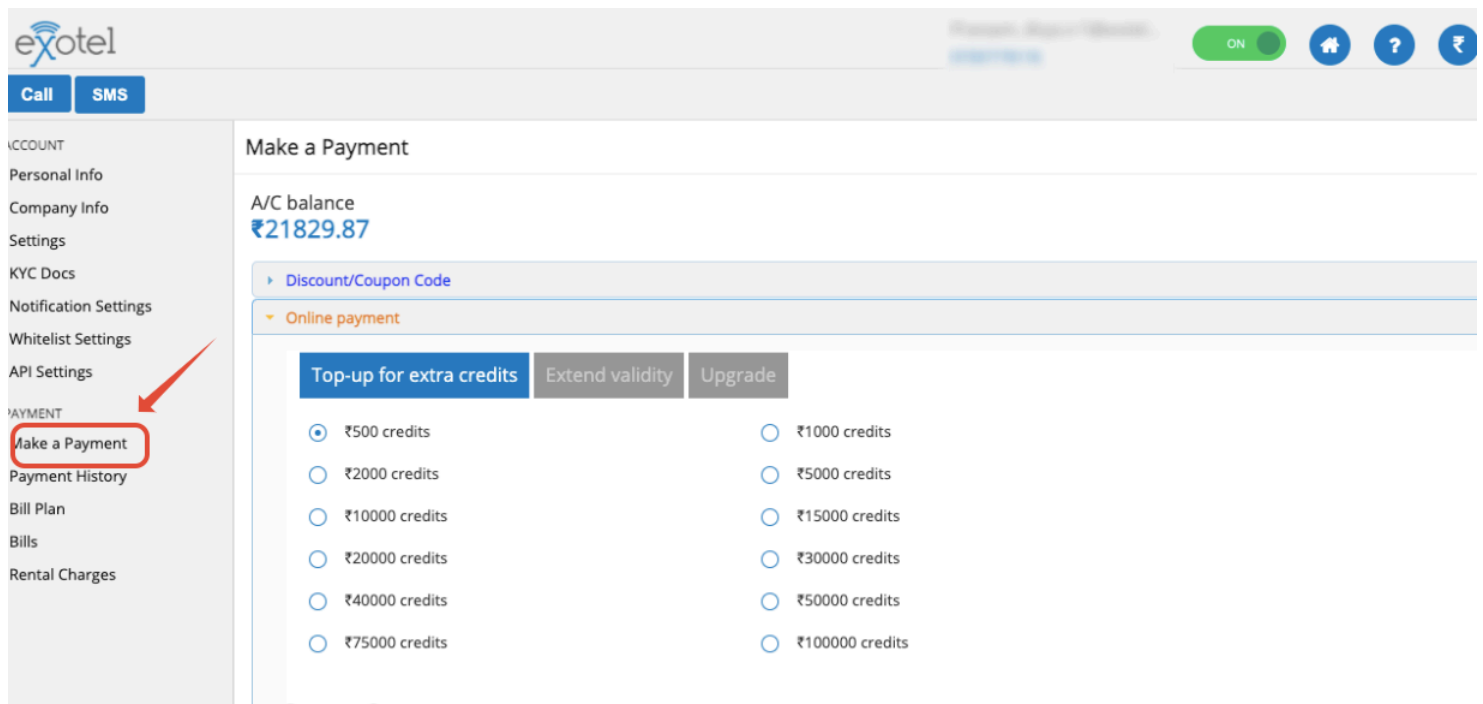
13.1. Payments

Make sure that you have logged in from the account with Admin access.

Step 1: Click on the **Make a payment** option on the top right side of your Exotel dashboard as shown in the image below.



Step 2: Click on 'Make a Payment' and select the recharge option as per your requirement.



Making a Payment

Making a payment is as simple as opening an Exotel account. We accept both online and offline payments; however, we strongly recommend using online payments because they are updated almost instantly, whereas offline payments take time. The following are the various payment methods available:

- 1. Netbanking:** We accept payments through Netbanking from all Indian banks.
- 2. Cards:** Our payment gateway supports both credit and debit cards.
- 3. Courier a Cheque:** This mode of payment should be the last resort as it takes a lot of effort from your end as well as ours. If you pay by cheque, it takes up to 7 days from the time we have received the cheque for the payment to reflect in your account.

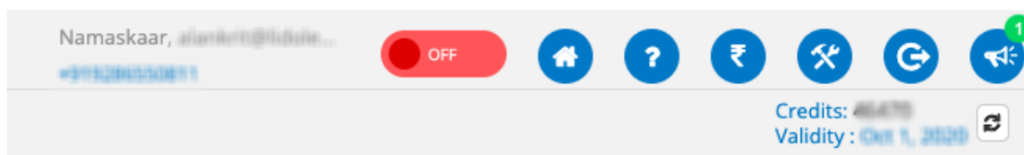
4. **Wallet:** We accept payments from your online wallets as well. For now, we accept payments from PhonePe, Amazon Pay, Freecharge, and PayZApp.
5. **UPI/QR:** We facilitate UPI payments as well. You can enter the UPI ID or the phone number or scan the QR code from your UPI app(PhonePe, Google Pay, or any other UPI App).

NEFT: It takes up to **3-5 working days** for the payment to reflect in your account. Below are the bank account details:

Beneficiary Bank Name - Kotak Mahindra Bank Ltd Account Holder Name - Exotel Techcom Private Limited Account no - 2512379407 IFSC - KKBK0008066 Bank Branch Name - MG Road Branch City - Bangalore

Note: Once the payment is done via NEFT, please share the details like UTR, Amount paid, Date of Payment, Account SID and TDS % to be deducted (if applicable).

Please note that you will also be able to view the validity and the credit balance of your Exotel account on the top right corner below the logout button on the dashboard as shown in the below image.



Under the payment page, we have three options. Please find each type and their definition given below:

Top-up for extra credits

This option helps you to add credits to your Exotel account. These credits are deducted as per your usage for calls, SMSes or to rent other features (extra ExoPhones, extra users, or any available apps) at Exotel. Please ensure to make a recharge for the extra credits once the account credit balance is low. Once the credits reaches 0, the services for the account will be stopped/suspended until further credits are added.

Please select the amount of credits that you need to recharge ranging from 500 to 100000 credits.

Make a Payment

A/C balance
₹45475.34

Valid till
October 1, 2025

Once your validity has expired, the remaining credits shall be consumed unless you have extended your validity by choosing the 'Extend validity' option below. [Know more](#)

Discount/Coupon Code

Online payment

Top-up for extra credits

Extend validity

Upgrade

☒ ₹500 credits

☐ ₹2000 credits

☐ ₹10000 credits

☐ ₹20000 credits

☐ ₹40000 credits

☐ ₹75000 credits

☐ ₹1000 credits

☐ ₹5000 credits

☐ ₹15000 credits

☐ ₹30000 credits

☐ ₹50000 credits

☐ ₹100000 credits

Payment Summary

Central GST : ₹0

State GST : ₹0

Integrated GST : ₹90

Deduct TDS at? ☒ None ☐ 1% ☐ 2% ☐ 5% ☐ 10%

Total Amount to be paid : ₹590.00

Proceed

Also, please ensure to select the right percentage of TDS amount that you would like to deduct while making the payment. Click here for further details regarding TDS.

Note: You will not be able to make a recharge for credits when your account validity is going to expire within a week. You will have to first extend the validity (which will be explained in the next type) and then make a recharge for credits.

Extend validity

This option allows you to extend the validity of your Exotel account. The validity of your account refers to the time period for which the account will be active. Consider it like the date of expiry for the account!

Online payment

Top-up for extra credits
Extend validity
Upgrade

☒ ₹5,999 : 5 months validity + 0 credits
☐ ₹10,499 : 11 months validity + 0 credits

Payment Summary

Central GST : ₹539.91

State GST : ₹539.91

Integrated GST : ₹0

TDS deduction is not available as TAN is not updated.

Total Amount to be paid : ₹7078.82

Proceed

Please ensure to make the payment for a validity extension at least a couple of days before the due date to ensure uninterrupted services.

Upgrade

This option is used to extend the validity of the account and add the credits at the same time. It acts as a combo package, where you only need to make a payment for adding both credits and validity.

Online payment

Top-up for extra credits
Extend validity
Upgrade

☒ ₹9,999 : 5 months validity + 5,000 credits
☐ ₹19,999 : 11 months validity + 9,500 credits
☐ ₹49,999 : 11 months validity + 39,000 credits

Payment Summary

Central GST : ₹899.91

State GST : ₹899.91

Integrated GST : ₹0

TDS deduction is not available as TAN is not updated.

Total Amount to be paid : ₹11798.82

Proceed

What personal information do you collect to accept my payment?

Before you can make an online payment (using debit/credit card or net banking), you would need to fill up your personal and company information as we pass it to our payment gateway to accept your payment.

Personal information required:

1. First & Last Name
2. Email

3. Phone number

These details are automatically picked up for the super admin of the account from the "Co-workers & Groups" page:

Edit user details

First Name

Ajay

Last Name

Chandra

Email

admin@exotel.com

Mobile or Land-line Number

08088919888

ON

When a call is routed to this person, this is the number that will be called.

NOTE:

- 1) You will be charged per user based on your User Billplan
Your current User Billplan : all users @ 0.0 credits per user per month
- 2) To verify your number,
 - a) Please give **missedcall** from newly added number to 09513885656
 - b) Get a **verification call** from Exotel

Cancel

OK

We also need the following information about your company:

Call

SMS

Personal Info

Company Info

Settings

KYC Docs

Notification Settings

Whitelist Settings

PAYMENT

Make a Payment

Payment History

Bill Plan

Bills

Basic info

Billing address

Regulatory point of contact

Company Name (as per PAN card)

Exotel Techoom Pvt Ltd

Brand Name

Exotel

PAN Card

TAN Card Number

GST Identification Status

☒ Registered
 ☐ Unregistered
 ☐ Pending registration

GST Identification Number

Entity type

Service Disruption Email

Billing Email Address

Billing address

Building/Flat number

22

Floor number

Ground

Name of premises/Building

Kensington Terrace

Road/Street

Kensington Road (Murphy Road)

Locality/Village

Ulsoor

City

Bangalore

State

Karnataka

Country

India

Pincode

560008

Regulatory point of contact

☒ Same as Super admin

Email

Where can I see my payment history?

Usually we finish billing your account by the 5th of every month. An email with the information on the credits usage for the previous month is sent to all the admins of the account. (Ex: March invoice would contain the usage of February as our billing works in a way where we account for the usage of the current month by the 1st of the following month)

Purchase order(PO) details

☐ Include purchase order(PO) details in the invoice ?

Usage Summaries

BILL PERIOD	AMOUNT	VIEW SUMMARY
01-09-2020 to 30-09-2020	₹152,280.00	↓
01-08-2020 to 31-08-2020	₹1,080,000.00	↓
01-07-2020 to 31-07-2020	₹1,080,000.00	↓
01-06-2020 to 30-06-2020	₹1,10,000.00	↓
01-05-2020 to 31-05-2020	₹8,000.00	↓
14-04-2020 to 30-04-2020	₹8,000.00	↓

Note: Usage reports before March 2013 are not available here.

Please note that if you have a prepaid bill plan, this is merely a usage summary and is not a request to make the payment.

You could go here to see the payment details made by you so far: <http://my.exotel.in/payments>

Payment History

GST period		Older payments						
DATE OF PAYMENT	AMOUNT PAID	AMOUNT CREDITED	SGST	CGST	IGST	DESCRIPTION	STATUS	RECEIPT
Oct 01 15:53	₹1,000.00	₹1,000.00	₹100	₹100	₹800	Online payment	completed	
Sep 18 13:12	₹1,000.00	₹1,000.00	₹100	₹100	₹800	Online payment	completed	
Sep 08 11:25	₹1,000.00	₹1,000.00	₹100	₹100	₹800	Online payment	completed	
Aug 26 15:35	₹1,000.00	₹1,000.00	₹100	₹100	₹800	Online payment	completed	
Aug 13 11:27	₹1,000.00	₹1,000.00	₹100	₹100	₹800	Online payment	completed	
Jul 28 12:25	₹1,000.00	₹1,000.00	₹100	₹100	₹800	Online payment	completed	
Jul 06 15:04	₹1,000.00	₹1,000.00	₹100	₹100	₹800	Online payment	completed	
Jun 12 09:47	₹1,000.00	₹1,000.00	₹100	₹100	₹800	Online payment	completed	
May 20 15:08	₹1,000.00	₹1,000.00	₹100	₹100	₹800	Online payment	completed	
Mar 31 15:59	₹1,000.00	₹1,000.00	₹100	₹100	₹800	Online payment	completed	

If you're logged into your account, click on the Buy Credits button in the top right corner.

Namaskar, [Namaskar Nam](#)

OFF

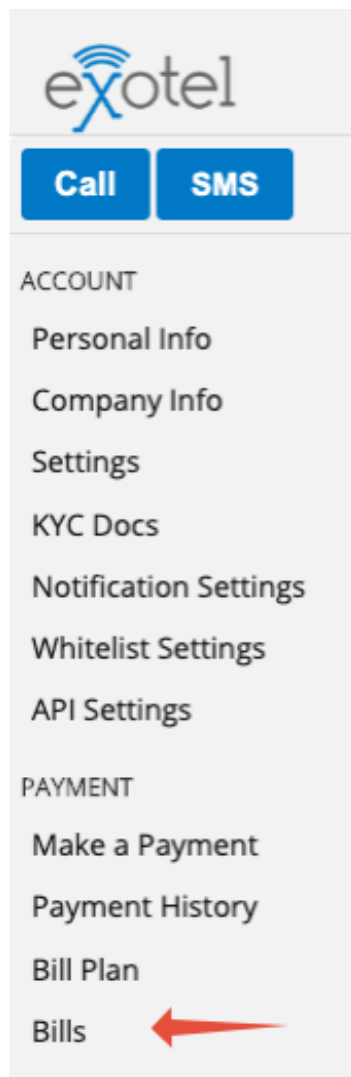




Credits: 07524



Click on Bills in the left panel. You will find a list of all your previous bills here.



You will also receive an email acknowledgement immediately every time you made an online payment. Currently, we do not send any automated acknowledgement if you make a payment by other modes(IMPS, NEFT, or RTGS).

What are the recommended recharge amount?

The recommended recharge amount depends on the purpose of recharge that is if it is for **credits** or **validity**.

If you are intending to recharge for your account's validity we have 2 options(5 months and 11 months) available. You can choose one of the options based on your requirement. To know more about the validity extension recharge you can click [here](#). This amount should ensure the smooth functioning of your operations

You can refer to your previous Bill to know your approximate usage for your account which should give you a fair idea of the denomination of the recharge to be made. Alternatively, you can also analyse your daily usage of credits by downloading the call and SMS reports of the previous day, week, or month and then make the necessary recharge depending on your average usage.

13.1.1. What happened to my payment?

I have paid X rupees. The amount is deducted from my bank account but not credited to my Exotel account. What is happening?

Recharging your account using our Payment gateway(from the dashboard) is the best method of payment because it is completely automated & instantaneous. But in rare cases, The transaction might not appear in your account for a few hours. There are a number of potential causes for this, including:

- The originating bank took some time to intimate our payment gateway provider.
- Our payment gateway servers were high on load leading to a delay in getting the details of your payment.
- Our own servers were a bit busy updating the details.

If have paid X rupees via NEFT/RTGS/IMPS method but the amount is not added to my Exotel account immediately. Why is there a delay?

All offline payments like NEFT/RTGS/IMPS initiated from your end will take up to 3 to 5 working days to reflect in the dashboard.

If you would like to fast-track this process we would request you to drop a mail to Hello@exotel.in with your NEFT transfer details to update the update in your account.

In some other cases, there might be an internal error in one of the servers involved. In these cases, our team will also manually update the payment details in your account.

If an online payment does not reflect in your account within 24hrs, If you have any questions or concerns, please connect with us using the chat widget on your Exotel Dashboard or Whatsapp us on 08088919888. This information will help us cross-check with our payment gateway providers and help us update the payment on your account.

13.2. Rentals

The billing procedure for all accounts has recently undergone adjustments from us. Rental fees were previously billed pro-rata on a daily basis throughout the month.

Starting from 1st April 2020, all rental charges as per your bill plan are deducted on the 1st of every month.

You would have received an email from us on 6th March 2020, regarding the same.

The rental charges include:

1. User rental Charges
2. ExoPhone rental charges
3. Software rental charges(Rental charges for Apps installed by Users) - This refers to the Apps available in the App Bazaar.

App Bazaar

Installed Apps

Available Apps

Install

Install an app for Free

Test out

Test the app with your trial number

Buy App

Happy with the app? 'Buy' it

Connect

Connect it to your company number

Zero

Rs. 0 per month [Try for Free](#)

Zero is by far the simplest and most useful Exotel App Handle multiple calls on ...

Shout Out

Rs. 0 per month [Try for Free](#)

Create a bulk IVR call campaign in minutes ...

Miss Call

Rs. 200 per month [Try for Free](#)

Missed call App for customer subscription and feedback Just a missed call and MissCall app ...

Miss Call Plus

Rs. 300 per month [Try for Free](#)

Missed call App with Passthru for customer subscription and feedback Just a missed call and ...

Phone a Friend

SquadVoice: Calling Agents

ExoFreshdesk by UMS Tech

Unlimited Co-workers

For example, please consider the below Sample Bill plan

Bill Plan

ITEM	NAME	DESCRIPTION
Account Rental	[Monthly] Rs. 5999 Account Rental Charges	Rs. 5999 Account Rental Charges
Call Charges	Standard Call Plan	40p/min for local calls 75p/min for STD calls
SMS Charges	All SMS a 0.21p/ 160 char	All SMS a 0.21p/ 160 char
User Charges	[Monthly] 3 users free, rest 199 per user per month	3 users free, rest 199 per user per month (New)
Exophone Software Rental	[Monthly] 1 ExoPhone free, rest 499 per ExoPhone per month	1 ExoPhone free, rest 499 per ExoPhone per month (NEW)

As per this plan,

1. A rental of Rs 199 will be charged (deducted from credits) once the fourth user is added.
2. ExoPhone Rental Fees: For each additional ExoPhone, a rental fee of Rs 499 will be assessed (deducted from credits).

Please note, For new users/Exophones, the monthly rental will be charged on the addition of them to the account.

For instance, if you acquire an ExoPhone on the twentieth of the month, you will be charged a rental of Rs 499 for that month, and the monthly rental will be charged once more on the first of the following month because the rental cycle is between the first and final day of the month.

The rental would apply for both numbers as long as they were two different numbers if an ExoPhone was removed and then acquired within the same month. If the same number is deleted and then bought again, only one monthly rental fee will be applied.

13.3. Account Validity

These are pre-decided denominations that you can purchase which will extend your account's validity.

If you purchase a pack that gives 5 months' validity today (Say, 1st June 2021), your account will expire on 31st October 2021. Let's say you paid Rs. 9999 for this 5-month validity, you get 4000 Exotel credit in your account just like how SIM card validity recharges will also give you talk time.

If you do another 5 months recharge one month down the line (On say, 1st July 2021), your expiration date now will be 30th March 2022 because your earlier validity expiry date was 31st October 2021 - the extension will happen from the date of validity expiry.

If you recharge any time before your account expires, then you will carry forward the pending balance. On the contrary, recharging an account after it expires will mean you would have lost all unused pending balances. By losing, we mean that you will see a line item for "unused credits" costing you the pending balance in your invoice for the expired month.

Validity Extension

In case you have enough credits and would only like to extend only validity without the addition of any credits, this can be done through the Exotel account.

Please go to the Payment Page: Please visit <http://my.exotel.in/pay>

Online payment

Top-up for extra credits

Extend validity

Upgrade

☒ ₹5,999 : 5 months validity + 0 credits

☐ ₹10,499 : 11 months validity + 0 credits

Payment Summary

Central GST : ₹539.91

State GST : ₹539.91

Integrated GST : ₹0

TDS deduction is not available as TAN is not updated.

Total Amount to be paid : ₹7078.82

Proceed

There are 2 options for extension of validity:

- 5 months validity - Rs 5999+18% GST=Rs 7078.82
- 11 months validity - Rs10499+18% GST=Rs 12388.82

Once you have extended the validity, you can buy credits separately later based on your requirements.

Top-up

Top-up is useful if you are running out of credits yet there is sufficient validity. Using the above example, let us say you run a campaign on the 25th of August that costs you Rs. 5500, then you only have just 500 Rs left. You would now "Top Up" your account for, let's say Rs. 5000.

Credit addition

In case you have validity and would only like to purchase credits, this can be done through the Exotel account.

Please go to the Payment Page: Please visit <http://my.exotel.in/pay>

Online payment

Top-up for extra credits
Extend validity
Upgrade

☒ ₹500 : 500 credits
☐ ₹2,000 : 2,000 credits
☐ ₹10,000 : 10,000 credits
☐ ₹20,000 : 20,000 credits
☐ ₹40,000 : 40,000 credits
☐ ₹75,000 : 75,000 credits

☐ ₹1,000 : 1,000 credits
☐ ₹5,000 : 5,000 credits
☐ ₹15,000 : 15,000 credits
☐ ₹30,000 : 30,000 credits
☐ ₹50,000 : 50,000 credits
☐ ₹100,000 : 100,000 credits

Payment Summary

Central GST : ₹45
State GST : ₹45
Integrated GST : ₹0
Deduct TDS at? ☐ 2% ☐ 10%

Total Amount to be paid : ₹590.00

The credits can be purchased based on the requirement. The GST amount of 18% will be applied to the credits and the same is visible on the dashboard.

Recommended recharge amount

For a video overview of recharges, watch: <https://learn.exotel.com/share/wRL82Zk162idMfsL6qwx8w>

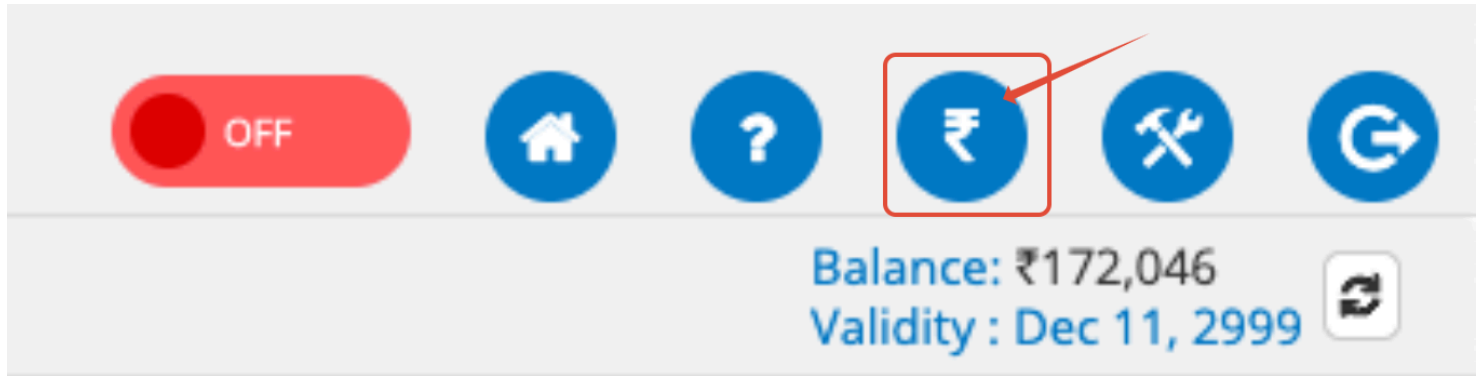
The recommended recharge amount depends on the purpose of recharge that is if it is for **credits** or **validity**.

If you are intending to recharge for your account's validity we have 2 options (5 months and 11 months) available. You can choose one of the options based on your requirement. To know more about the validity extension recharge, see the Validity Extension section above. This amount should ensure the smooth functioning of your operations.

You can refer to your previous Bill to know your approximate usage for your account which should give you a fair idea of the denomination of the recharge to be made. Alternatively, you can also analyse your daily usage of credits by downloading the call and SMS reports of the previous day, week, or month and then make the necessary recharge depending on your average usage.

13.3.1. What happens when my validity expires?

If you fail to make a payment by choosing the "Extend Validity" option before the Validity expiry date (mentioned on the top right in your account), your entire existing balance will be invalidated. This also means your service will be suspended, Calls and SMSes through Exotel will be terminated.



We would suggest you make a validity payment before the expiry date to carry forward your entire credits to the next validity period so that you can use them later.

We'd be really sad to invalidate your balance, and would love it if you can make full use of this balance before that

13.4. Tax invoice and Payment receipt

Tax Invoice

A tax Invoice is generated at the beginning of each month(before 6th) determining the actual usage of services by each client. For instance, if the client has utilized services worth Rs.500/- the invoice is generated for Rs.590/- which is inclusive of 18% GST. The invoice documents are shared with the series beginning with:

For prepaid customers: DR19SINXXXX

For postpaid customers: DO19SINXXXX

Receipt Voicher

A receipt voucher gets generated whenever a client (prepaid) makes a payment. GST is always inclusive. In some cases, businesses include TDS as well. For instance, if a client has made a payment of Rs.1,180/- it essentially comprises of payment of Rs.1,000 + GST of Rs.180 (18% of the service value). The receipt voucher documents are shared with a series beginning with RD0000

Frequently asked Questions

Where can I download the tax invoice and the payment receipt from?

To make it simple, an Invoice is generated at the beginning of each month based on the usage for the previous month. This can be downloaded from the “Bills” section of the dashboard.

Call SMS

ACCOUNT

- Personal Info
- Company Info
- Settings
- KYC Docs
- Notification Settings
- Whitelist Settings
- API Settings

PAYMENT

- Make a Payment
- Payment History
- Bill Plan
- Bills**

Purchase order(PO) details

☐ Include purchase order(PO) details in the invoice ⓘ

Usage Summaries

BILL PERIOD	AMOUNT	VIEW SUMMARY
01-03-2020 to 31-03-2020	2000.00	
01-02-2020 to 29-02-2020	1000.00	
01-01-2020 to 31-01-2020	1100.00	
01-12-2019 to 31-12-2019	800.00	
01-11-2019 to 30-11-2019	900.00	
01-10-2019 to 31-10-2019	1000.00	
01-09-2019 to 30-09-2019	1200.00	
01-08-2019 to 31-08-2019	1300.00	
01-07-2019 to 31-07-2019	1400.00	
01-06-2019 to 30-06-2019	1500.00	
01-05-2019 to 31-05-2019	1600.00	

The receipt voucher is generated for the payment made (Credits recharge, Extended validity, or an Upgrade) and is available for download from the “Payment History” section of the dashboard.

CallSMS

ACCOUNT

Personal Info

Company Info

Settings

KYC Docs

Notification Settings

Whitelist Settings

API Settings

PAYMENT

Make a Payment

Payment History

Bill Plan

Bills

17 credits 1488

Monday, 20 Feb 2024

Payment History

GST period

Older payments

DATE OF PAYMENT	AMOUNT PAID	AMOUNT CREDITED	SGST	CGST	IGST	DESCRIPTION	STATUS	RECEIPT
Apr 03 10:06	₹1,000.00	₹1,000.00	0.00	0.00	₹0.00	Online payment	completed	
Mar 14 10:03	₹1,000.00	₹1,000.00	0.00	0.00	₹0.00	Online payment	completed	
Jan 14 23:00	₹1,000.00	₹1,000.00	0.00	0.00	₹0.00	Online payment	completed	
Jan 14 22:57	₹1,000.00	₹1,000.00	0.00	0.00	₹0.00	Online payment	completed	
2019 Jul 24 07:54	₹1,000.00	₹1,000.00	0.00	0.00	₹0.00	Online payment	completed	
2019 Apr 19 07:28	₹1,000.00	₹1,000.00	0.00	0.00	₹0.00	Online payment	completed	
2018 Oct 10 12:39	₹1,000.00	₹1,000.00	0.00	0.00	₹0.00	Online payment	completed	
2018 Apr 14 13:00	₹1,000.00	₹1,000.00	0.00	0.00	₹0.00	Online payment	completed	
2017 Oct 06 16:33	₹1,000.00	₹1,000.00	0.00	0.00	₹0.00	Online payment	completed	

Who gets the bills in my company?

We have completely automated the billing process and simplified invoice delivery.

- No hard copies. All digitally signed invoices will be dispatched by email, post billing every month within the first week.
- Folks who choose to register can add their email IDs under My-Account-> **My Company Info > Billing Email Address** -

exotel		Namaskaar, [Name]		ON															
Call SMS		Credits: 7944																	
ACCOUNT Personal Info Company Info Settings KYC Docs Notification Settings Whitelist Settings API Settings PAYMENT Make a Payment Payment History Bill Plan Bills Rental Charges	My Company Info																		
	Basic info																		
	Company Name (as per PAN card)			:	Support_Backup														
	Brand Name			:	Support_Backup														
	PAN Card			:	[Redacted]														
	TAN Card Number			:	[Redacted]														
	GST Identification Status			:	☐ Registered ☒ Unregistered ☐ Pending registration														
	Entity type			:	Company														
	Service Disruption Email			:	[Redacted]														
	Billing Email Address			:	[Redacted]														
	Billing Country			:	India														

- All other admins in your Exotel PAN card will receive an email with the link to the URL from where they can download the invoices.
- By chance you want to send the notifications to an email that doesn't belong to an admin, you can do so by specifying these emails in a comma-separated format here: <http://my.exotel.in/Exotel/cinfo>

The person who registered the account is no longer with my company. What should I do?

You can choose to remove the email ID from the billing email address. Please refer to this article for the steps.

<http://support.exotel.in/solution/articles/35155-how-do-i-change-the-super-admin-email>

I want a hard-copy to submit to the accounting team

Considering we moved to digitally signed invoices post GST implementation in 2017 and because we think it is easier for you to just download and forward the invoice internally if needed for further approvals. Also, saving the planet!

I still want to receive the invoices by email

Ask the person who registered the account to setup email filters and forward the mails to you. The subject of our invoices in "Your Exotel bill", and you can learn more about setting up filters here: <https://www.google.co.in/search?q=how+to+create+email+filters>

13.4.1. Tax Deductions

India: The following tax explanation applies to companies who have a registered address in India and Exotel renders services to them in India.

There is a tax applicable for the services provided by Exotel and we do charge it. We charge 18.00% GST (Government-mandated) at the time of writing this article and is subject to change.

Also see [Tax invoice and Payment receipt](#)

What is the GST credit which will be shown in the client's portal?

For prepaid customers

Since the GST component is shown both in the invoice and the receipt voucher, the confusion of which value reflects in the GST portal arises.

Under GST Act, the client will be able to claim the credit only based on actual usage made by him during the month – which gets reflected in the invoices raised and **not** the Receipt voucher. An invoice is a pre-requisite document to claim input credit and such invoice will be issued by us only upon 'supply' of services by us, i.e., your usage of our services.

Example: Let us assume that you pay INR 11,800/- (10,000 + 18% taxes) to recharge your account on 05-Apr-2019.

You will be given a receipt voucher (Series starting RDSIN19XXXXXX) on the date of payment.

Say, if you had usage of INR 5000/- from 01-Apr-19 to 30-Apr-19. An invoice will be raised on 01-May-19 for April month's usage for INR 5,900/- (INR 5,000+18% taxes for Series starting DR19SINXXXXX).

While preparing the GSTR1, we have to file the details of invoices raised for the month. So we will be filing the DR19SINXXX series for all the customers. Hence the input GST that you can take will be INR 900/- i.e., on the actual usage made by them, and not INR 1800 paid by them on the receipt voucher/-.

The balance amount will be reflected based on the usage in the subsequent months.

This is done because as per Section 16(1),(2) of the GST Act, Input credit can be claimed only based on utilization and not on payment.

For postpaid customers

Postpaid customers can claim input GST credits on the invoices shared by us dated the first of every month.

Why is the GST component missing in the invoice?

For prepaid clients for whom we have received payments before 01-July-2017, we would have technically collected Service Tax. The credits granted for those payments which remain unutilized by the end of June would have been subsequently utilized in the month of July for which we started raising GST invoices. Since we have already collected Service Tax for that usage, we cannot charge them again with GST, because of which we have shown it as a Non-taxable service*. As these invoices do not have any GST component in them, though these have got generated after 01-July-2017, they do not bear any credits for the client in the client's GST portal.

(*) Non-taxable service shows the value of credits utilized from their credit balance as of 30-June-2017 as per section 142(11) of GST Act, 2017

When will the credits reflect on the client's portal?

The filing is done on the 11th of every subsequent month and the credits will be reflected for the clients in 4-5 working days post that.

Can I change GSTIN?

Change of GSTIN can be done until the 5th of the subsequent month of invoicing. For instance, if the invoice is run on 01 November, the changes can be entertained until 05 December.

It is the same for change of address too.

Modifications of details can be done only in the following cases:

- The customer was earlier recorded with an incorrect GSTIN and wants to get it changed.
- We will not be able to revise it for a customer recorded as Unregistered earlier.

How is TDS deducted?

TDS is deducted @ 2% on the total taxable value(usage value in the invoice) and not the total invoice value. The reason is, that the invoice value is inclusive of the GST component, and deducting TDS on that value will technically lead to tax on tax. Exotel currently falls under the 2% TDS rate by virtue of section 194J(1)(b) - Fees for Technical Services. Please click [here](#) to know more about Section - 194J.

International (Everywhere other than India):

The following tax explanation applies to companies who are registered outside India and Exotel renders services to them outside India.

Presently, the export of services is zero-rated so there will not be any GST charged for any international clients.

Here is a link to the official document by CBEC(Central Board of Excise and Customs) where Section 16(1) of the IGST Act, 2017 states the above.

For Indian Registered Companies using our International services:

We kindly request you to place a request with our Customer Happiness Team on the below-mentioned contact details to provide you with the tax invoice with the GST component.

13.4.2. TDS

The concept of TDS was introduced with the aim to collect tax from the very source of income. As per this concept, a person (deductor) who is liable to make payment of specified nature to any other person (deductee) shall deduct tax at source and remit the same into the account of the Central Government. The deductee from whose income tax has been deducted at source would be entitled to get a credit for the amount deducted on the basis of Form 26AS or a TDS certificate issued by the deductor. Click here to know more about TDS.

Exotel currently falls under the 2% TDS rate by virtue of section 194J(1)(b) - Fees for Technical Services. Please click here to know more about Section - 194J.

In order to smoothen the online payment process and help you to comply with accounting processes, we have introduced the option of deducting TDS online.

For this, you would need to update your company info (at my.exotel.in/cinfo) with your TAN number. After completing this information you would be able to see an option for TDS deduction (2%) on the payment page*.

- Please note that this option will be visible only if you have an annual payment of Rs 30,000 or more.

While making an online payment, you will be able to choose the option to deduct TDS. Please refer to the annotated section in the following screenshot.

Online payment

Top-up for extra credits

Extend validity

Upgrade

☒ ₹500 credits
 ☐ ₹2000 credits
 ☐ ₹10000 credits
 ☐ ₹20000 credits
 ☐ ₹40000 credits
 ☐ ₹75000 credits

☐ ₹1000 credits
 ☐ ₹5000 credits
 ☐ ₹15000 credits
 ☐ ₹30000 credits
 ☐ ₹50000 credits
 ☐ ₹100000 credits

Payment Summary

Central GST : ₹45

State GST : ₹45

Integrated GST : ₹0

Deduct TDS at?

☒ None
 ☐ 2%

Total Amount to be paid :

₹590.00

Proceed

Note: If you have missed deducting TDS on payment and if you would like to make the payment of the same, please make the intended TDS payment to the tax department and share with us Form 16A. We shall get the same checked from Exotel's Form 26 AS and refund the payment.

13.4.3. TDS Reconciliation

What is TDS? What do I do there?

Tax Deducted at Source (TDS) is a system introduced by the Income Tax Department, which was introduced with an aim to collect tax from the very source of income. It is where a person responsible for making specified payments is liable to deduct a certain percentage of tax before making payment in full to the receiver of the payment.

1. You as a customer will be deducting TDS whenever you make a payment and declare the same to Exotel.
2. The deducted TDS will be remitted against our PAN and quarterly filing will be done from your end against our PAN.
3. Once the TDS filing is done, you will share the TDS certificate(Form-16A) generated with Exotel.
4. This will eventually reflect in Exotel's Form-26AS as well.

--> Learn more about [TDS](#)

Is there a time period to file this?

All this should be done within the prescribed time, mandated by the government for the financial year. Exotel will be considering the TDS credits reflected in our Form-26AS by the end of August and will be discharging the Income Tax liability after considering the TDS credits available to us as reflected.

In case, if you have done the same after September, you may revise your returns and claim back the amount remitted. This is the usual practice for all taxpayers and is resolvable at your end. But from Exotel's end, this is something that shall not be claimed or adjusted.

Is there any impact if I don't file or remit TDS as per mentioned date?

If you did not have enough credits, your account will go into a negative balance. You will have to recharge your account at <http://my.exotel.com/pay>. Also, refer to this support article to understand the outcomes of a negative account balance:<https://support.exotel.com/a/solutions/articles/49534>

I do not agree with the record you have shared with me. I want to dispute this. What do I have to do?

Please reply to us on the email with your book of records looping in your accounts team and we shall loop in our accounts team to rectify this discrepancy.

13.5. Prepaid Billing

When are the rentals for users and ExoPhones deducted for my prepaid account?

We deduct the rental charges immediately after the ExoPhone or the coworkers are added. The charges will be deducted only if you add a Coworker or an ExoPhone added beyond your account's free limit. The recurring monthly rental for these additional users and ExoPhones will be deducted on the 1st of every month. Let's say for example (this applies to both adding coworkers and ExoPhones), your account has a limit of 3 ExoPhones which will be free and you would like to add another one on the 15th of a month. You will be charged the rental on the 15th for that month and the monthly rental for the next month will be deducted on the 1st of the coming month. If you choose to delete the ExoPhone before the last day of the same month, you will not be charged the rental for the next month.

The Rental Charges tab under the Buy Credits page will give you the summary of the monthly rentals applicable to your account as shown below:

ACCOUNT

Personal Info

Company Info

Settings

KYC Docs

Notification Settings

Whitelist Settings

API Settings

PAYMENT

Make a Payment

Payment History

Bill Plan

Bills

Rental Charges

Charged Rentals ⓘ

Rental Charged On	Rental Type	Deduction Type	Deducted For Month	Amount Deducted
July 2022	Exophone	Regular	July 2022	₹100

< prev | next >

Pending Rentals ⓘ

Pending From	Rental Type	Amount Pending
To see your call and SMS usage, kindly click here		

What are your payment terms?

Your Exotel account is a prepaid account - This is similar to the prepaid SIM card mobile number connection offered by telecom operators. Your account will be active & all functionality will be available as long as your account has not expired & there is an available balance in your account. That is,

Validity: These are pre-decided denominations that you can purchase which will extend your account's validity. If you purchase a pack that gives 5 months validity today (Say, 1st June 2021), your account will expire on 31st October 2021.

Let's say you paid Rs. 9999 for this 5-month validity, you get 5000 Exotel credit in your account just like how SIM card validity recharges will also give you talk time (Of course, these days most prepaid SIM cards have 10-year validity by default. So, no one really does validity recharges anymore).

If you do another 5 months recharge one month down the line (On say, 1st July 2021), your expiration date now will be 30th March 2022 because your earlier validity expiry date was 31st October 2021 - the extension will happen from the date of validity expiry. If you recharge any time before your account expires, then you will carry forward the pending balance. On the contrary, recharging an account after it expires will mean you would have lost all unused pending balances. By losing, we mean that you will see a line item for "services" costing you the pending balance in your invoice for the expired month.

Online payment

Top-up for extra credits
Extend validity
Upgrade

☒ ₹5,999 : 5 months validity + 0 credits
☐ ₹10,499 : 11 months validity + 0 credits

Payment Summary

Central GST : ₹539.91

State GST : ₹539.91

Integrated GST : ₹0

TDS deduction is not available as TAN is not updated.

Total Amount to be paid : ₹7078.82

Proceed

Topup: Topup is useful if you are running out of credits yet there is sufficient validity. Using the above example, let's say you run a campaign on the 25th of August that cost you Rs. 5500, then you only have just 500 Rs left. You would now "Top Up" your account for, let's say Rs. 5000.

Online payment

Top-up for extra credits
Extend validity
Upgrade

☐ ₹500 credits
☐ ₹1000 credits

☐ ₹2000 credits
☒ ₹5000 credits

☐ ₹10000 credits
☐ ₹15000 credits

☐ ₹20000 credits
☐ ₹30000 credits

☐ ₹40000 credits
☐ ₹50000 credits

☐ ₹75000 credits
☐ ₹100000 credits

Payment Summary

Central GST : ₹450

State GST : ₹450

Integrated GST : ₹0

TDS deduction is not available as TAN is not updated.

Total Amount to be paid : ₹5900.00

Proceed

Support

Refunds: Currently, we do not refund your pre-payment. Read this article to find ways to consume unused Exotel credits.

Temporary suspension: There is no way to temporarily suspend your account.

Tax: Would be applicable as per the Governing law.

Exotel's pricing works like a prepaid card or a wallet. Once you have credits - You can use the credits for a variety of things: Making calls, Sending SMS, installing apps, or adding users. Applicable charges for these activities are mentioned visibly.

13.6. Postpaid Billing

Every postpaid account will be set with a 'Credit Limit'. Your Exotel account will remain active until your outstanding bills reach this limit.

If your outstanding payment amount breaches this limit, your Exotel account will automatically stop working, ie your services will be temporarily disabled.

How is my credit limit calculated?

We shall set your credit limit to twice the maximum comparatively among your last 3 bills. If your latest bill happens to be less than the month before, we will not reduce your credit limit. For Eg: If your last 3 months' bills were 6500, 9000, and 7000, your credit limit would be set to $9000 * 2 = \text{Rs. } 18000$. Your credit limit will automatically be re-calculated every month.

I want to be safe. How do I know if I'm nearing my credit limit?

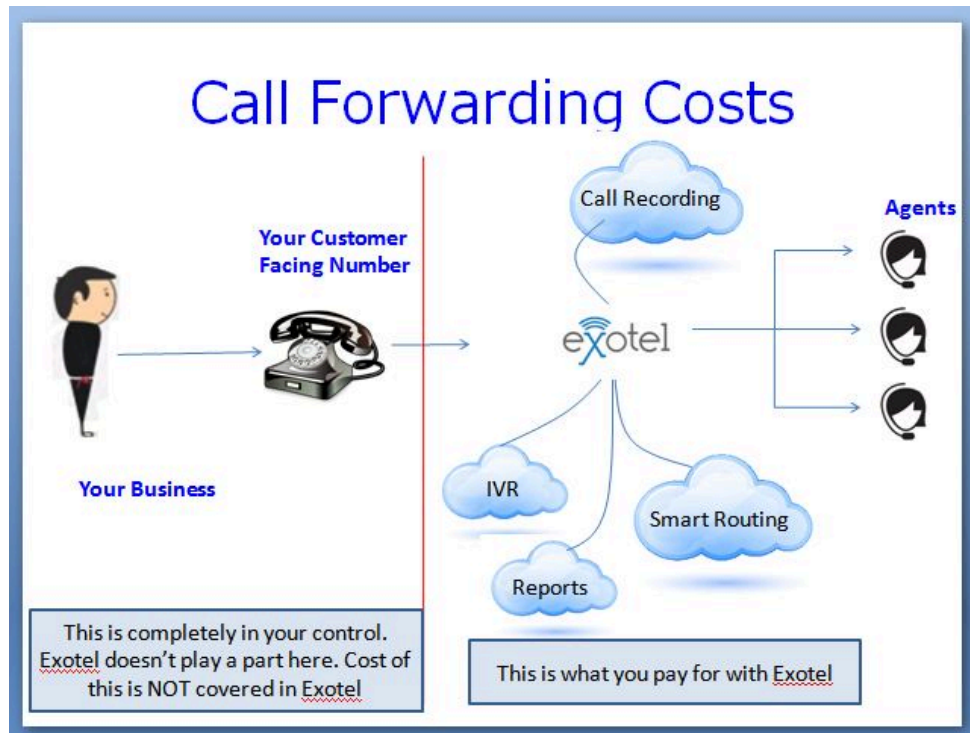
Normally if you make your payment within a week of receiving the bill from Exotel, there won't be any issues. But if you are nearing your credit limit, we will intimate you via email regarding the same. You can set the duration for which you want to be alerted under notification settings.

Darn! I have reached my credit limit. How do I pay?

Please head to our online payment page and make a payment. We have more options to pay as well like NEFT, Netbanking, UPI, etc. Below is a link to the article explaining the different options. <https://support.exotel.com/solution/articles/49154-how-do-i-pay->

13.7. Call Forwarding Charges

Your Customer-Facing Number belongs to you. When you forward the calls to your ExoPhone, you will get the benefits of cloud telephony. However, call forwarding is something that your service provider does for you. So, you will be paying for this separately to your service provider and this won't be included in your Exotel bill.



13.8. Zero Credit Balance

Once your Exotel credit balance becomes zero/negative, all services are automatically discontinued, which indicates you will **no longer be allowed to make and receive calls or send SMSs using Exotel**. Whenever we detect that your current consumption may exhaust the whole of your available credits, we send a **Low Balance Alert** email to all account admins four days in advance (only if the notification for this kind is 'enabled on' on the dashboard). As a consequence, you must **register with an email address** that you often use in order to receive these notifications.

Whenever your credit balance reaches zero, we will email you **Daily Recharge Reminders** to support you in topping up your account for the following 10 days. If the account is not recharged after this time frame, the following will occur:

1. All of your ExoPhones will be released to the pool so that someone else can acquire them. This number is **no longer obtainable**.
2. You will need to **add the sender id** again if you acquire new exophones.

There are many ways to top up your Exotel Account. See [Payments](#) -->

13.9. Exotel Coupons

If you have an Exotel Coupon, Please refer the above video and you can redeem it by doing the following:

1. Go to <http://my.exotel.in/pay>
2. Choose the Discount/Coupon Code option from the given tabs as shown below

Make a Payment

A/C balance

₹2,43,714.88.80

Valid till

December 15, 2020

Once your validity has expired, the remaining credits shall be consumed unless you have extended your validity by choosing the 'Extend validity' option below. [Know more](#)

▼ Discount/Coupon Code

Code:

Redeem

► Online payment

3. Enter your coupon code and click redeem

Once you've done that -

- Prepaid accounts: You'll see that your coupon amount has been added to your Exotel balance.
- Postpaid accounts: You will see that in your forthcoming bill, a discount worth the amount on the coupon is given to you.

13.10. Frequently Asked Questions

13.10.1. Why am I charged for failed calls?

Scenario:

In the reports (or via Call details API), for an outgoing call that has a 'failed' status (busy or no-answer as well), you still see a charge under the 'Price' section.

Explanation:

Regardless of the overall/final status, you get charged based on the number of parties who have answered the call successfully.

To understand this part better, it would be wise to go through our support article that explains our Call Statuses and the way by which we currently arrive at the 'Final Status' that's based on the 'From' (i.e. Leg1) and 'To' (i.e. Leg2) statuses

Outbound calls - connecting two numbers

The 'Final Status' depends on the 'Leg2 Status'

Leg1 Status	Leg2 Status	Final Status
Completed	Completed	Completed
Completed	No answer	No answer
Completed	Busy	Busy
Completed	Failed	Failed
NA (No answer)	NA	No answer
NA (Busy)	NA	Busy
NA (Failed)	NA	Failed

Assigned To		Status	Delete
None		Open	
From :	To :	Through :	
07988887729 completed	Vamshi Datar(0933168531) failed	0933168531	
Call Reference Id:	Total Talk Time:	Call Time:	
8916786021846463056792061163p	0s	Fri, 25 Mar 2022 18:11:13	
Start Time:	End Time:		
Fri, 25 Mar 2022 18:11:13	Fri, 25 Mar 2022 18:13:42		
Transcription:			
Missed Call from 07988887729 at Fri, 25 Mar 2022 18:11:14. One or all of the agents failed to attend or were busy			
Here is what happened:			
Missed Call from 07988887729 at Fri, 25 Mar 2022 18:11:14. One or all of the agents failed to attend or were busy. The number 0933168531 received a call from 07988887729 at Fri, 25 Mar 2022 18:11:14. The call was transferred to "Blocked_numbers". The call was transferred to "Spore_Support Five_Level1". At the menu, the user selected 2. The call was transferred to "VM - Spore_Support Five_Level1". At the menu, the user selected 1. The call was transferred to "VM - Spore_Support Five_Level1". The call was transferred to "VM - Customer Happiness 267_Sixth_Floor". The call was routed to the following members of the group "Support and Sales 267_Sixth_Floor Business (07988887729)", whose number we could not reach and Vamshi Datar (0933168531), whose number we could not reach. The call was transferred to "Missed Call_VM_Level1".			
Disposition			

As the above table indicates, there would be instances where the 'Final Status' would be marked as **failed** and only the 1st person may have answered the call but the 2nd person might have not answered, been busy or there could be cases where the calls genuinely must've **failed** to reach the 2nd person.

In such cases, you're charged only for the 1st leg that's successfully connected from our ExoPhones.

At the outset, if the calls fail to connect the 1st person or fail to even originate from our servers, you are **NOT** charged for such calls at all.

Should you identify any anomalies that fall outside the scope of this explanation, do please report such cases to our Customer Happiness Team via hello@exotel.in along with the corresponding call reference IDs as that way,

13.10.2. Why am I charged for incoming calls?

In India, as we all knew, incoming calls are free, unlike in some other nations such as the United States or Singapore. We've become accustomed to it, and it's now the de facto norm in India.

However, Exotel still charges you for incoming calls to your phone number.

Here's the explanation of why we charge you:

The Exophones are hosted on our cloud platform. As a consequence, we can now play a greeting, route calls to your team's numbers, and keep track of all of your calls. When a caller contacts your Exophone, we must route it to your team, and we utilise the software to make an outbound call to your users' phone numbers, linking you with the caller.

Every inbound call to your users' number is an outbound call from your Exophone, as you can see from the caller ID. As a result, we charge inbound calls at the applicable rates (**as specified by your Bill Plan**).

Similarly, every outbound call made utilizing your Exophone costs twice as much as an inbound call. This is because we call your user first, and after she/he picks up the phone, we call your customer and link the two of them. Two outbound calls from your Exophone are required, for which you'll be charged.

13.10.3.

Where will I get my billing and service disruption/downtime related notifications?

By default, all billing-related communications happen to all the admins of your account. You can make a user an admin by following the steps [here](#).

Non-Admin/Non User: If a Person/SPOC is not a user of the account, You can add the Email ID of the SPOC (if they are not an admin) in the Service disruption Email and Bill Email Address Section to receive downtime and Billing related notification emails

And, by chance you want billing communications to be done to your billing department or if you want the service disruptions/downtime emails to go to your tech department, you can do so by specifying these emails in a comma-separated format here: <http://my.exotel.in/cinfo>.

Basic info

Company Name (as per PAN card)	:	Exotel Techcom Pvt Ltd
Brand Name	:	Exotel
PAN Card *	:	
TAN Card Number	:	
GST Identification Status *	:	☒ Registered ☐ Unregistered ☐ Pending registration
GST Identification Number *	:	
Entity type	:	Company
Service Disruption Email	:	123@456.com
Billing Email Address	:	abc@xyz.com
Billing Country	:	India

13.10.4. My Exotel credits are expiring soon. How do I make best use of my existing credits?

Launch an SMS campaign for your clients. An SMS campaign is a terrific way to keep your clients updated while also gaining their attention.

You may send them a message using your new phone number, a special offer, or information about new products. Here's how to use it:

1. Import your existing contacts into your Exotel address book
2. Setup your SMS campaign

Send your clients an 'IVR Blast.' Schedule an appointment for a call campaign. Simply select a list and the message to be delivered, then schedule the IVR Blast. Here's how to go about it: [How do I schedule a bulk Call/SMS campaign?](#)

14. Frequently Asked Questions

14.1. Best browser to use Exotel

Exotel is compatible with Firefox and Chrome. But Exotel works best on Chrome.

14.2. Video Documentation

A video reference of the relevant scenario may have been requested from you by our Customer Happiness team during one of your interactions with them.

- **Calls not landing on Exophone**: You might be wondering why we would ask for it, and while the reasons may vary, the following are some of the typical ones:
Calls not connecting to the Exotel number are typically an indication of an **Incoming** Point of Interface (**POI**) problem between two or more operators, though these issues may not always be easily reproducible from all operators and all locations (or combinations of such cases, thereof). The operator is almost always contacted when we encounter these problems, and we provide them with all the necessary information so they can troubleshoot the problem further and have it sorted as soon as possible. A video simply makes the process go more smoothly and can avoid multiple interactions.
- **DTMF** - For example: You may enter only 5 digits via DTMF input, but Exotel transcript may indicate that 7 digits have been captured. Given that we (as a supplier of cloud telephony) and the telcos can only act in accordance with what the logs show, they (logs) may not always portray a complete picture that closely approaches what the reality may be on a more granular or ground level. When we raise these concerns with the operator, they too follow the logs that contain frequency relating to the 7 digits themselves. However, what goes undocumented is the fact that only 5 digits were initially entered, and there is no other way for us or the operators to know the same.

These are just a handful of such instances and in no way are the only ones where we may require video documentation of the issue that's being reported.

There have also been times where this request may come across as a way to solicit mere “proof” as opposed to believing when such issues get reported to us. We can assure you that *this*, in no way, would call into question the credibility of the requester or the issues being presented. This is just to understand the issue further from our end and take into account if there are any variables in play that might produce the outcome which was obtained.

This process simply helps with escalating matters where we believe immediate actions are required, either by the operators or us (on a platform level).

While you are free to decline any such requests and advise our team to explore alternatives, it may take us longer than expected to work with various entities in having some of these resolved.

14.3. Upgrade your Browser to support TLSv1.2

We are deprecating TLSv1.0 and TLSv1.1 on our Dashboard URLs. This support article contains information about what is currently supported and regarding this change.

What TLS versions are currently supported?

Going forward(From 20th Feb 2023), Exotel will only support TLS v1.2 for the Dashboard URLs.

Why are TLSv1.0 and TLSv1.1 deprecated?

Security best practices strongly advise against the use of early/older TLS versions for secure communications on the web. As a consequence, Exotel decided to no longer support SSL or early TLS versions before v1.2 for our Dashboard URLs. This action has been taken to maintain the highest standard of security for our customers.

How do I test whether the change will affect my environment?

The best way to determine if your environment is affected by the TLS changes is to make a simple HTTP request to Exotel's Dashboard URLs from your browser. If the dashboard URL works successfully, no changes will be necessary for your environment.

What if I get errors while testing Dashboard URLs?

Most likely the errors you receive will be due to having an OpenSSL browser version that does not offer support for TLSv1.2. To correct this, you should update your browser which supports TLSv1.2.

Tips for Upgrading Your Environment to Support Exotel Dashboard TLS Changes

Starting 20th Feb 2023, the Exotel dashboard will only support connections that use TLSv1.2. If your environment fails to connect to our Dashboard URLs, you may need to upgrade your browser to be compatible with these changes.

Which cipher suites are supported by the dashboard with the change to TLSv1.2?

From 20th Feb 2023 Exotel dashboard supports ONLY TLSv1.2 and the following cipher suites:

- ECDHE-ECDSA-AES128-GCM-SHA256
- ECDHE-RSA-AES128-GCM-SHA256
- ECDHE-ECDSA-AES128-SHA256
- ECDHE-RSA-AES128-SHA256
- ECDHE-ECDSA-AES128-SHA
- ECDHE-RSA-AES128-SHA
- ECDHE-ECDSA-AES256-GCM-SHA384
- ECDHE-RSA-AES256-GCM-SHA384
- ECDHE-ECDSA-AES256-SHA384
- ECDHE-RSA-AES256-SHA384
- ECDHE-RSA-AES256-SHA
- ECDHE-ECDSA-AES256-SHA
- AES128-GCM-SHA256
- AES128-SHA256
- AES128-SHA
- AES256-GCM-SHA384
- AES256-SHA256

- AES256-SHA

Which browsers are supported by the dashboard with the change to TLSv1.2?

Android 4.4.2

Android 5.0.0

Android 6.0

Android 7.0

Android 8.0

Android 8.1

Android 9.0

BingPreview Jan 2015

Chrome 49 / XP SP3

Chrome 69 / Win 7

Chrome 70 / Win 10

Chrome 80 / Win 10

Firefox 31.3.0 ESR / Win 7

Firefox 47 / Win 7

Firefox 49 / XP SP3

Firefox 62 / Win 7

Firefox 73 / Win 10

Googlebot Feb 2018

IE 11 / Win 7

IE 11 / Win 8.1

IE 11 / Win Phone 8.1

IE 11 / Win Phone 8.1 Update

IE 11 / Win 10

Edge 15 / Win 10

Edge 16 / Win 10

Edge 18 / Win 10

Edge 13 / Win Phone 10

Java 8u161

Java 11.0.3

Java 12.0.1

OpenSSL 1.0.1l

OpenSSL 1.0.2s

OpenSSL 1.1.0k

OpenSSL 1.1.1c

Safari 6 / iOS 6.0.1

Safari 7 / iOS 7.1

Safari 7 / OS X 10.9

Safari 8 / iOS 8.4

Safari 8 / OS X 10.10

Safari 9 / iOS 9

Safari 9 / OS X 10.11

Safari 10 / iOS 10

Safari 10 / OS X 10.12

Safari 12.1.2 / MacOS 10.14.6 Beta

Safari 12.1.1 / iOS 12.3.1

Apple ATS 9 / iOS 9

Yahoo Slurp Jan 2015

YandexBot Jan 2015

Failure Signatures

These are some common error messages that may indicate your system does not support the security changes:

- The server aborted the SSL handshake
- Connection refused
- Handshake failed
- Unable to connect to the remote server
- The connection was forcibly closed by the remote host
- Connection timed out

Components to Check

There are several components involved in connecting to our dashboard URL that may need to be upgraded or reconfigured to use TLSv1.2:

- Browser
- Network Proxy
- Firewall

In most cases, you simply need to upgrade your browser to its latest version.

In rare cases, you may have a network proxy or firewall that does not support or is not configured correctly for TLSv1.2 connections. You'll need to consult with your network administrator if you suspect that is the issue.

Every environment is different, so we recommend you consult your browser documentation and IT support staff or vendor to thoroughly investigate and upgrade the affected components.

Verifying the Upgrade

Once you've made the necessary changes, verify your upgraded system can connect successfully to the same dashboard URL from your browser, using the same testing procedures.

14.4. Can I send emails to my customers with Exotel?

No, we are not a bulk mailer or a mass mailer service. We ourselves use Amazon's SES and have been very happy with their product.

Exotel uses email as a mechanism to notify you, and your co-workers about the events that happen in your phone system. Some events that you can configure Exotel to notify you:

- Missed call
- Unattended call
- Outbound call
- Customer voicemail
- Call assignment from co-worker to you
- Report download availability etc.
- When an agent switches on/off

Email notifications

Control when and how often Exotel sends emails to you. [Learn more.](#)

- ☒ ON Send me daily analytics email.
- ☒ ON Alert me when all the agents of a group are off
- ☒ ON Alert me when an agent switches on/off
- ☒ ON Send me emails about new features
- ☒ ON Mail me when i make an outbound call
- ☐ OFF Alert me about incoming calls that don't reach any group (Call attempt notification email)

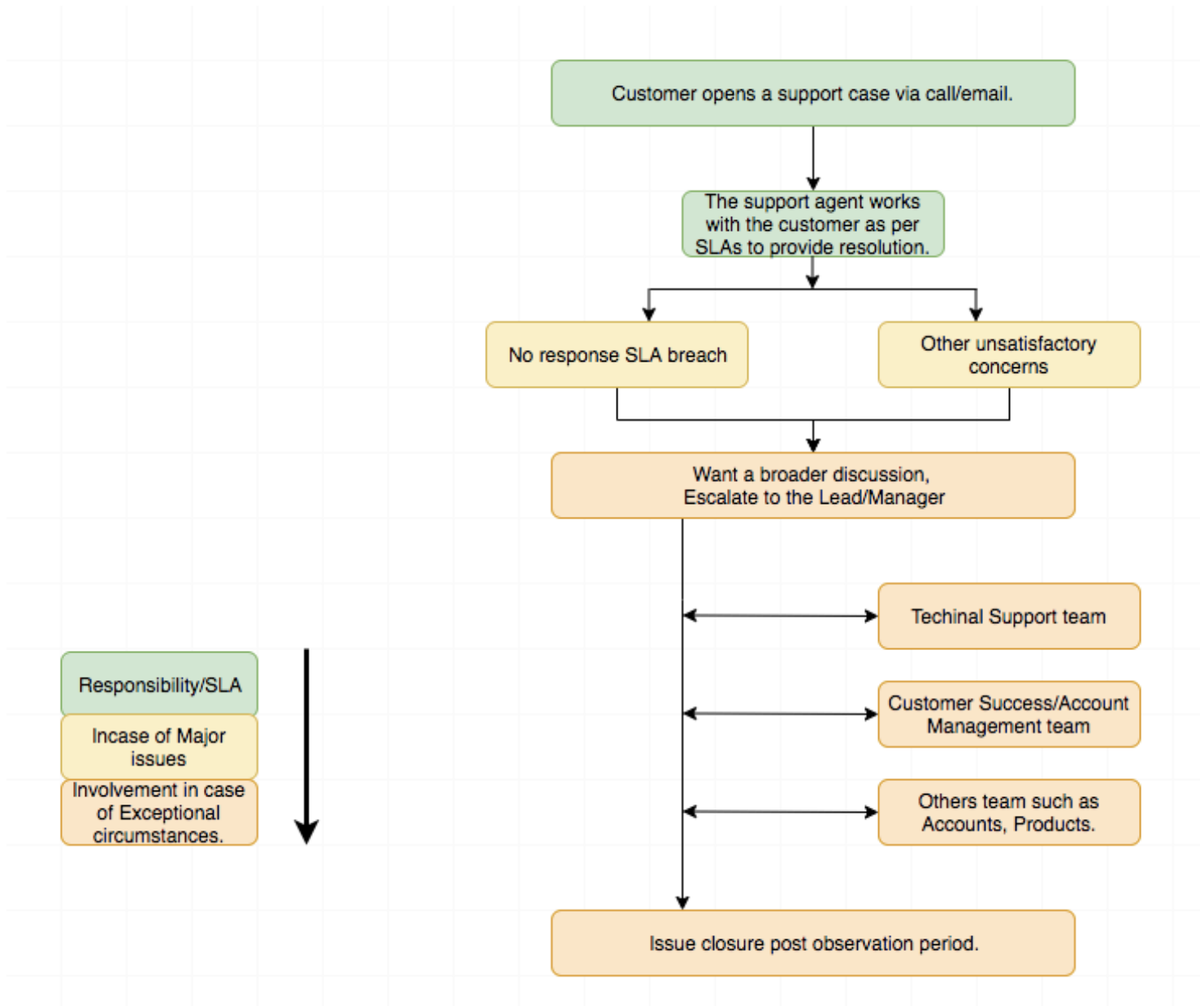
For more details on what call notifications are, Please read "What notifications do I get?".

As you can see, Exotel can intimate you & your colleagues about calls & SMS-related events. But, if you want to send emails to your customers, then you have to choose a mass mailer service. And these days, there are many email marketing services.

14.5. What is the Support escalation process?

The escalation process is designed to keep you informed of your escalated case status every step of the way. A lead and/or manager is assigned to every escalation to oversee the case from a holistic viewpoint. This member is responsible for evaluating the situation and taking action towards resolution.

Escalation Process Overview



When Should an Escalation Be Initiated?

A customer can escalate an issue at any point in time. However, we request you work with our team and follow the standard process so that there is no delay in providing the right resolution. This is because, even in case of an escalation, the basic checks will have to be performed by the lead/manager before taking any further steps. Ideally, we would prefer, if an escalation is initiated when there is a direct impact on your production environment/business operations and our support staff has not been able to operate at a level defined in the SLA. Nevertheless, we understand that there could be other reasons for the customer to escalate the issue as well.

What is the Process for Escalating My Case?

The entry point into the escalation process is via the support case. Any issues/concerns need to be reported via the call/ticket to follow this process. The reason behind this is to get multiple teams involved if need be in a consolidated manner. All teams involved will add their observations on the case so that the other members can view the progression of the issue.

The normal process for a support case is:

1. Call us at +91-8088919888 and report the incident.
2. Write to us via hello@exotel.in and you will receive a ticket Id for reference. Once the ticket has been submitted, this incoming ticket is assigned to a Support Engineer who usually provides the best solution for the raised concern. If the gap between the customer's expectation and the platform possibilities cannot be resolved, an escalation is started.

How Can I Escalate My Case?

- **Via Call:** You can call us on the support number +91-8088919888 and may escalate the issue via the support agent. The call will be transferred to the voice manager who addresses your concerns.
- **Via Escalation form:** You can visit our website and fill in the form. A corresponding ticket will be created and the respective lead/manager will reach out to you within the next 30 mins via email/call.
- **Via Email:** You could also CC the respective account manager (if any) on the ongoing support ticket and the escalation is started. The respective lead/manager will reach out to you within the next 1 hour via email/call.

	Point of Contact	Email	Phone	Response time
1	Customer Happiness Team	hello@exotel.in	08088919888	30 mins
2	Level 1 escalation	Escalation form	08047182701	30 mins
3	Level 2 escalation	escalations@exotel.in	08047109797	1 Hour

What Can I Expect During an Escalated Status?

You will be contacted by the respective lead/manager and we will collaborate and develop a communication plan. In case necessary a technical plan will also be created. The lead/manager will act as a virtual member of your problem statement and work towards the resolution/closure of the support case.

An escalation will be considered closed if it meets one or more of the following requirements:

- The objectives that were initially agreed upon have been achieved.
- The problem has not recurred in the monitoring time period and the customer is satisfied.
- You have agreed that the issue is resolved.
- A mutual agreement in case the issue cannot be resolved on time bound and the case will be considered as feedback and prioritized in the near future.

De-Escalation Process

Once resolved to the customer's satisfaction, the situation is monitored for an agreed-upon period. The escalation team remains on standby and available in case the problem reoccurs during the monitoring period.

The de-escalation process follows these steps:

Once the monitoring period is successfully completed, the escalation is closed by the lead/manager after seeking an agreement with the customer.

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

14.6. When will you answer my Ticket or Resolve my Query?

Exotel's Customer Happiness Team endeavors to provide its customers with the best Customer Support Services to ensure the best Product experience. In case, you or your authorized User(s) face any issues or have any questions in relation to our Product, please contact our Customer Happiness Team, we are available 24*7 for all our enterprise clients and 14*7 (8.00 am to 10.00 pm) for SME and SMB clients. You may reach out to our team **using the chat widget on your Exotel Dashboard or Whatsapp us on 08088919888.**

We will respond to your query basis the severity of the issue faced with our Product (hereinafter referred to as “**Level of Severity**”) set out in Table A and typically come back with further updates within the time frames set out in Table B below:

TABLE A		
Severity Level	Description	Label
1	Errors that prevent useful work from being completed such as successful calling, server inaccessibility, operator downtimes, application-based errors.	Urgent
2	Errors that keep major functions from being performed, but a workaround is available. e.g. access to the server is slow, the server accepts requests but is not responding within the acceptable time duration, time delay in response for a call, etc.	High
3	Errors that are generally non-disabling or cosmetic.	Medium
4	Errors or requests related to business operations such as reconciliations, logs, etc.	Low

TABLE B

Level of Severity

Response Time

Acknowledgment Time

Severity 1

2 Hours

30 minutes

Severity 2

5 Hours

30 minutes

Severity 3

24 Hours

30 minutes

Severity 4

24 Hours

30 minutes

** Third-party integrations will have different SLA, given there might be a dependency on them. Please refer to the respective integration guide or support article for actual SLA.

We value our business association with you and aim to build it into a long-lasting relationship of trust. We hope you enjoy using our Product as much as we love serving you! We reserve the right to review, revise, amend, modify or re-enact our Support Services Policy, and in case we do so, you can access our updated Support Services Policy right here on this page.

Payment Processing SLA:

If you are making a payment via methods other than online payment through Exotel Account, please send us an email mentioning the following:

1. Account Name (the account name that you have with the Exotel system)
2. Amount Paid
3. NEFT Transaction/Cheque No.
4. Date of Transaction/Submission
5. TDS Deduction (2% of 10%)

Without an email, with the above information, we will not be able to update any amount. **The following SLA applies only after we get the required information via an email.**

Payment Method	Processing Time
Online Payment (via Exotel Account) <i>(If you are paying online, please make sure you fill your TAN in the "Company Info" section and select a TDS amount, and complete your KYC documentation process)</i>	Real-time
Other Modes of Payment (NEFT or Cheque)	Up to 5 Business Days from the day of Credit into the Exotel Account

14.7. How to choose the right subdomain for my API integration?

Choosing the Right Subdomain

Exotel operates on multiple clusters. Your account's subdomain depends on the cluster it was created in.

Singapore cluster

- If your Exotel account URL is `my.exotel.com`, use this subdomain.
- Subdomain: `api.exotel.com`

Mumbai cluster

- If your Exotel account URL is `my.in.exotel.com`, use this subdomain.
- Subdomain: `api.in.exotel.com`

14.8. Outages

The term Downtime or sometimes even referred to as Outage is used to describe that our services are completely or partially unavailable. There could be several reasons that could cause this. We have classified a few and they are as follows:

Operator related Downtimes: These issues are related to our network operators or downstream providers. During this period, you can expect an interruption in incoming or outgoing calls, and sometimes both. Although we have no control over this, our team constantly follows up with the operators to ensure that the services are restored at the earliest.

Unplanned Downtimes: We come across these, when our network operators face issues like fibre cut or any other operator related concerns. These can occur at any point in time due to several reasons and are outside Exotel's control. Also, Exotel might not have the exact ETA for these issues as the operator's team will be working on fixing them. RCA/RFO for these outages are dependent on the operators. We will share the RCA/RFO as soon as we get the details from the operator.

Planned maintenance: These are planned activities that the operators keep us informed about and in turn we keep our clients informed. This generally happens during off-peak hours, mostly during night hours when the call volumes are low and the impact is less on our customers.

Exotel Specific Downtimes: These are instances where something has stopped working internally at Exotel's end. Example: The platform is unresponsive or some of the Exotel APIs are not functioning, as they are supposed to, etc.

Unplanned Downtimes: We come across these when either some internal service that is responsible for the job has either stopped working or the servers did not respond the way they are supposed to due to configuration issues. Normally we will have this fixed within 2 - 4 hours, however, in case of a major failure, which is rare, this might take longer. RCA for these downtimes will be shared by us within 72 hrs of the issue being resolved.

Planned maintenance: This is when we are either upgrading our Servers or Data centres. These would be planned in advance and we will keep our customers informed about the same. Also, they would be planned during off-peak hours when the impact on our customers will be minimal.

Troubleshooting Steps during Downtimes

If you have a customer-facing number displayed on your website, then you can divert the calls to a different region exophone number available in your account and resume your services without interruption.

For example:

If this exophone number: 080-XXX-XXX is affected due to downtime and you have this number as the customer-facing number 9432XXXXX displayed in your website then find a different region exophone that does not start with like 022-XXX-XXX then route the call to this exophone 022-XXX-XXX from your customer-facing number and assign the exophone number to your incoming call flow.

This step will not be helpful if you have displayed the exophone number 080-XXX-XXX directly on your website.

You can also subscribe to our **Heartbeat API** (<https://developer.exotel.com/api#heartbeat-subscription>) to keep you informed about exophone status. Heartbeat API notifies the 'health' of an Exophone in real-time based on which actions can be taken at your end.

14.9. Understanding Exotel Status Board

This article is about understanding call status on Exotel Status Board. For more information about what Exotel Status Board is, why we built it etc., you might want to read this blog.

As an Exotel customer, you will have one or more Exophones on which you'd receive inbound calls, as well as make outbound calls. Our monitoring system makes automated inbound and outbound calls, to and from each Exophone, at regular intervals.

Your call status would look like this:



All systems are operational

⊖ Incoming Calls



Indonesia ⓘ	Operational
Karnataka ⓘ	Operational
Chennai ⓘ	Operational
Mumbai ⓘ	Operational
Delhi ⓘ	Operational
Gujarat ⓘ	Operational
Kerala ⓘ	Operational
Andhra Pradesh ⓘ	Operational
Pune ⓘ	Operational
Rajasthan ⓘ	Operational
Madhya Pradesh ⓘ	Operational
West Bengal ⓘ	Operational

⊖ Outgoing Calls



Indonesia ⓘ	Operational
Vietnam ⓘ	Operational
Karnataka ⓘ	Operational

What do the different Status symbols mean?

For incoming calls,

- An Exophone is "down" if 2 successive calls (made from different pipes) to it have failed.

- Else, the Exophone is "up"

For outgoing calls,

- An Exophone is marked as "down" if 2 successive calls (made to different numbers) from it have failed
- Else, the Exophone is "up"

Apart from calls, we have also incorporated the monitoring status of other components in the product like the Dashboad and SMS, which you'd be able to see when you scroll down.

Other Components	
Vietnam ⓘ	Operational
Dashboard (my.exotel.com)	Operational
Incoming SMS ⓘ	Operational
Outgoing SMS ⓘ	Operational

If you scroll all the way down, you'd also be able to observe all incidents that were reported each week along with the resolution time.

Past Incidents

19th November 2021



Pune Issue observed for 'Incoming Calls' in Pune Region

2 days ago

Identified at [19/11/21 12:05 AM] with 'Major Outage'

Issue has been resolved at [19/11/21 12:10 AM]

18th November 2021

No incidents reported

17th November 2021



Gujarat Issue observed for 'Outgoing Calls' in Gujarat Region

3 days ago

Identified at [17/11/21 11:55 AM] with 'Partial Outage'

Issue has been resolved at [17/11/21 12:00 PM]



Gujarat Issue observed for 'Outgoing Calls' in Gujarat Region

3 days ago

Identified at [17/11/21 11:05 AM] with 'Partial Outage'

Issue has been resolved at [17/11/21 11:10 AM]

[← Previous Week](#)

[Next Week →](#)

Please note that, on top of this, we'd be sending out "Downtime emails" as well to all affected clients in case of an outage in any region.

Why do incoming calls to an Exophone fail?

Incoming calls to an Exophone can fail because of the following reasons:

1. The Operator pipe is down (this is the most common failure reason)
2. There is an internet connectivity issue in our data center
3. In case of mobile and toll-free numbers, the call divert is down because the mobile network is down. This is rare.

Why do outgoing calls from an Exophone fail?

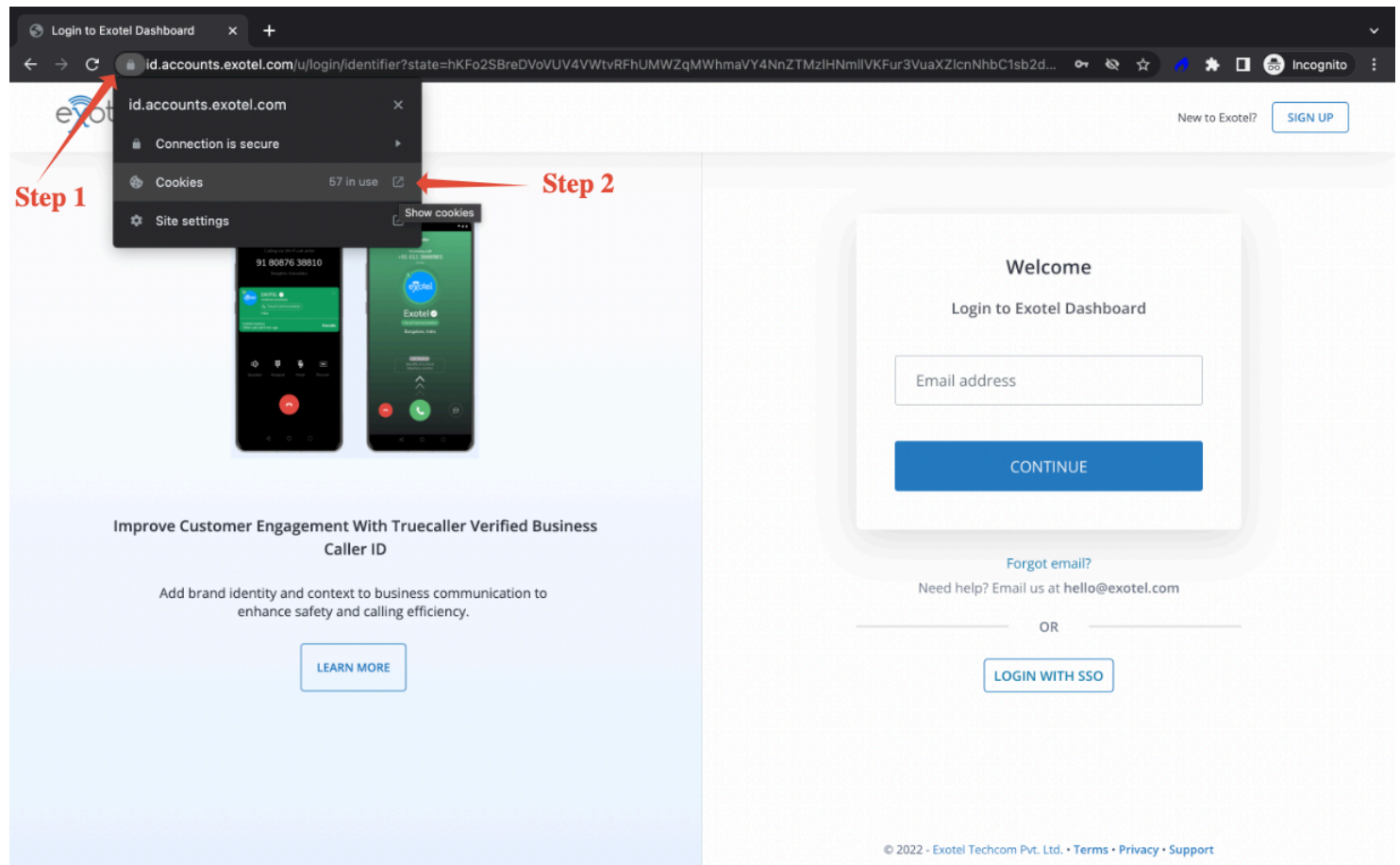
Outgoing calls from an Exophone fail rarely. When they do, it would be mostly because there is a problem with the internet connectivity to our data center

14.10. Clear Exotel cookies from your browser

Chrome

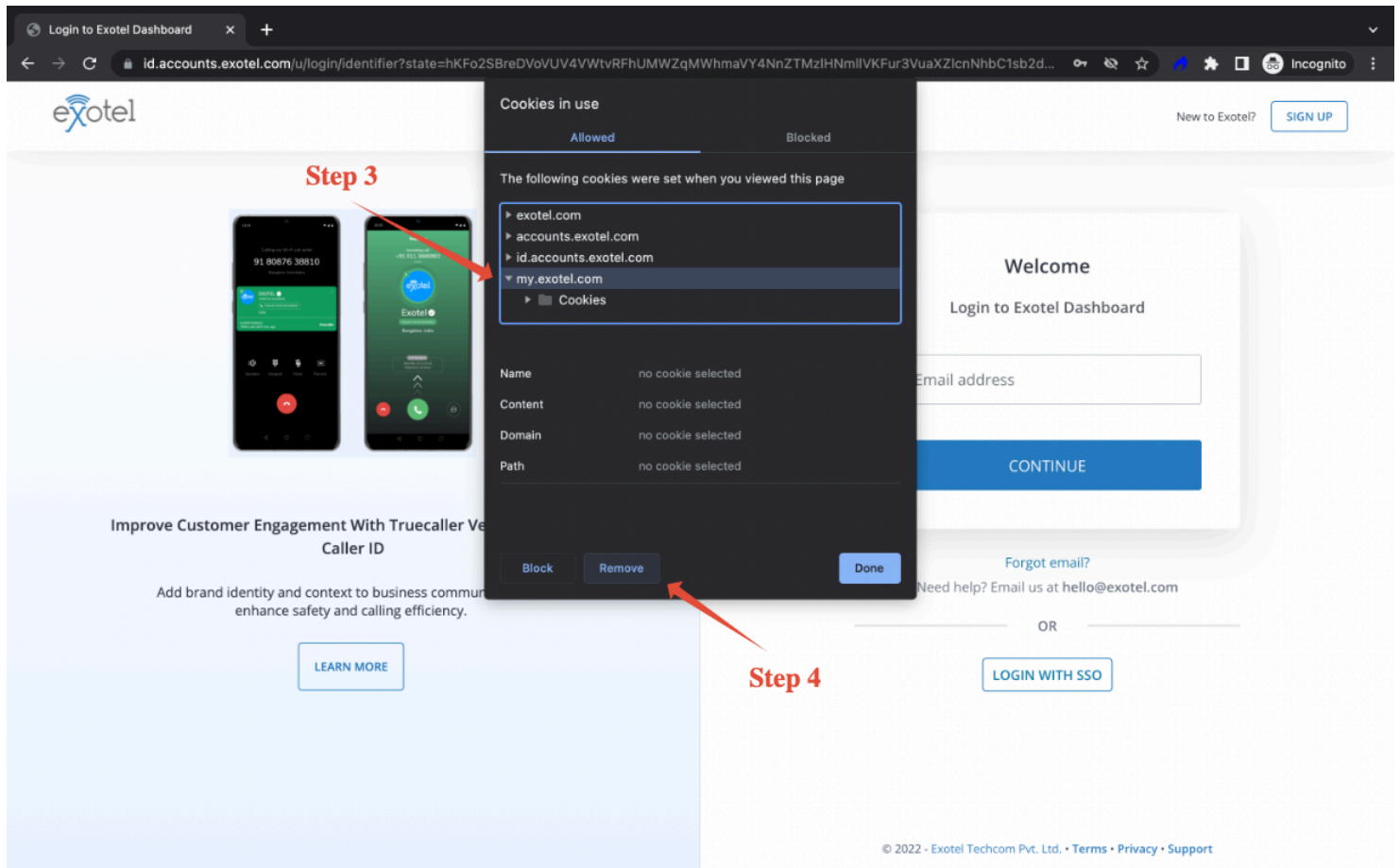
Step 1 - Go to my.exotel.com and click on the 'Secure' / SSL option (next to the lock icon)

Step 2 - From the drop-down, click on the highlighted part under 'Cookies' - note that this need not always show as "57 in use" as it may vary.



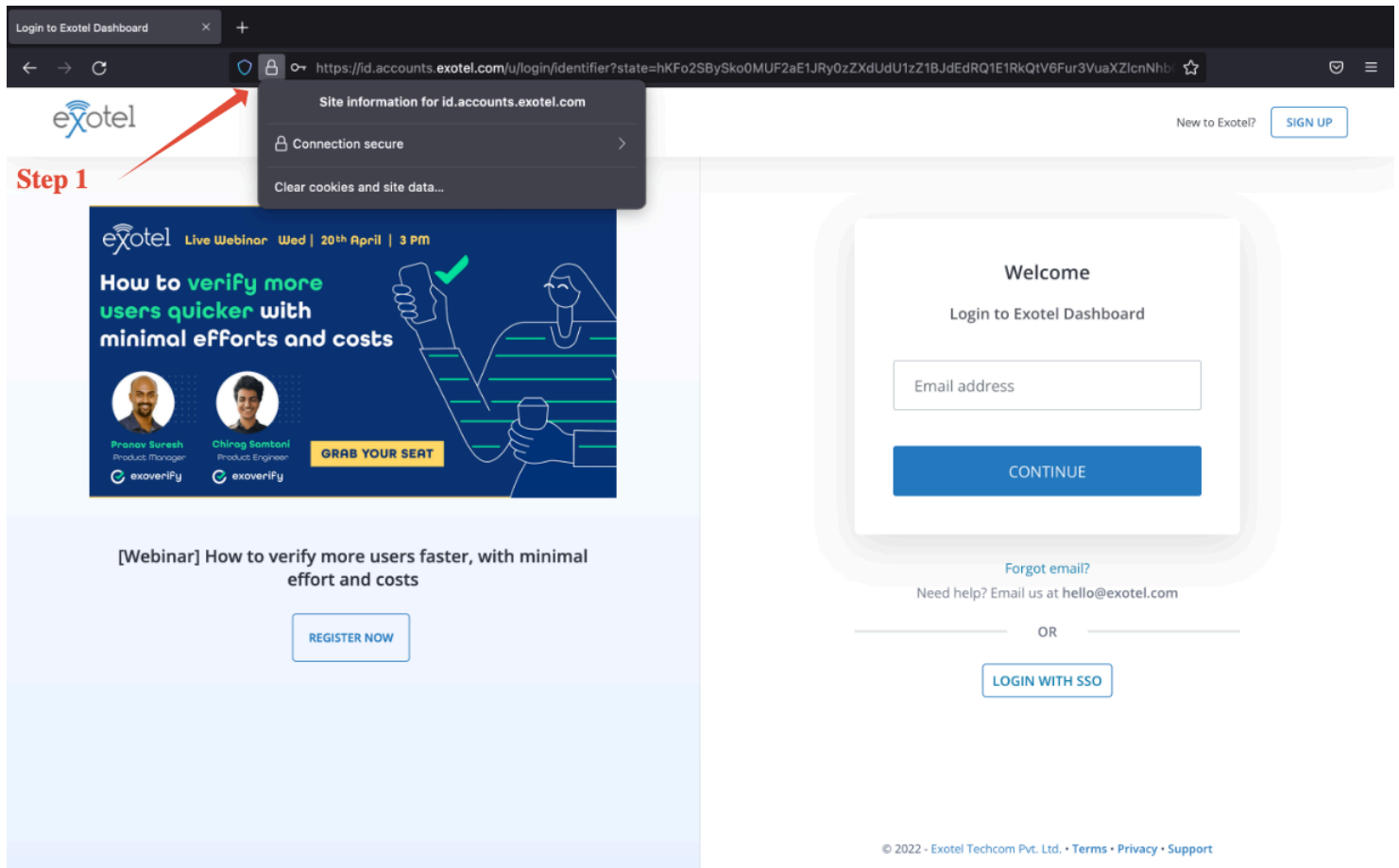
Step 3 - Click on 'my.exotel.com' (option) > 'Cookies' (folder) & select all options that show-up, including 'openvbx_session'

Step 4 - Click on 'Remove' and then close/refresh for changes to take effect

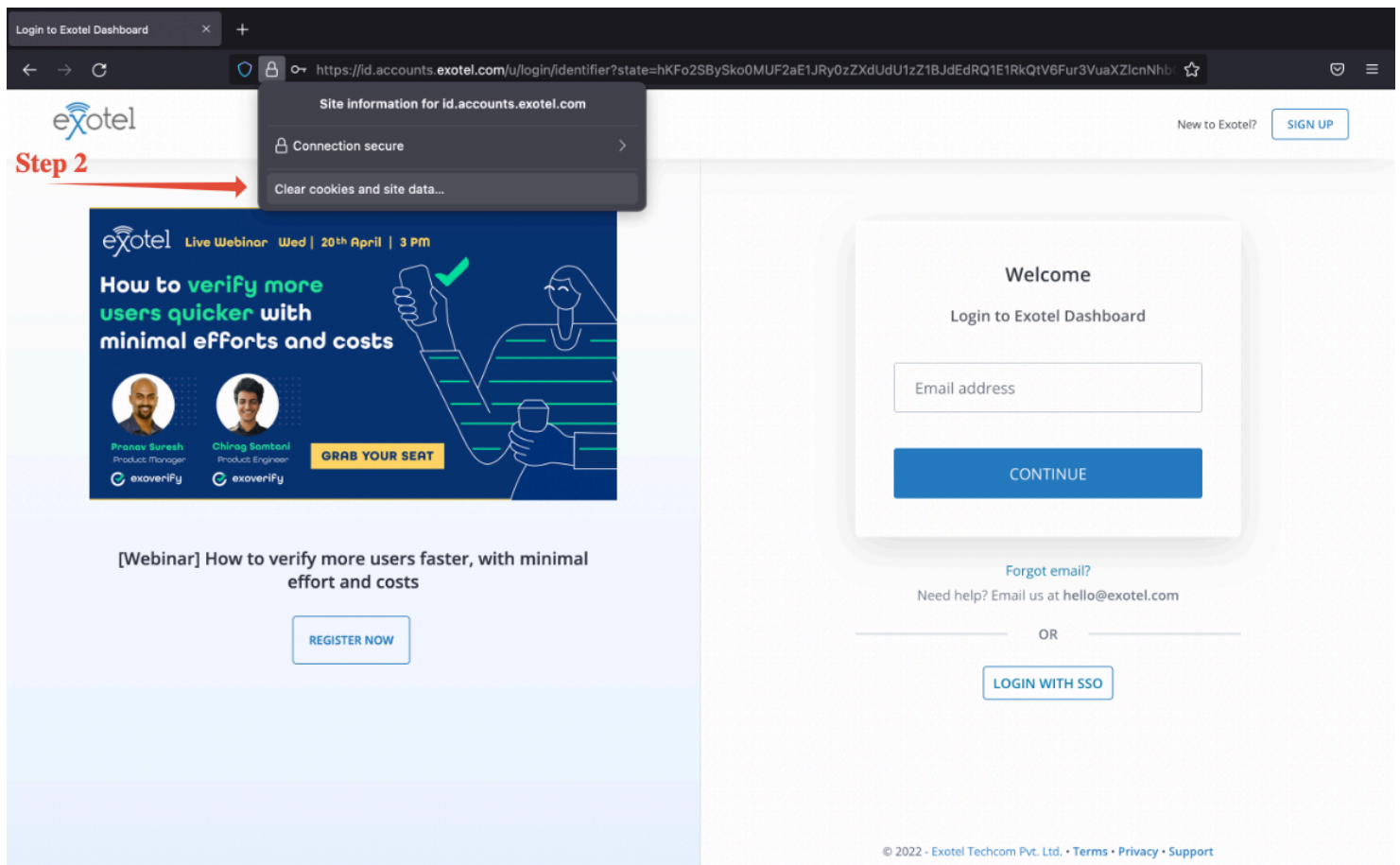


Mozilla Firefox

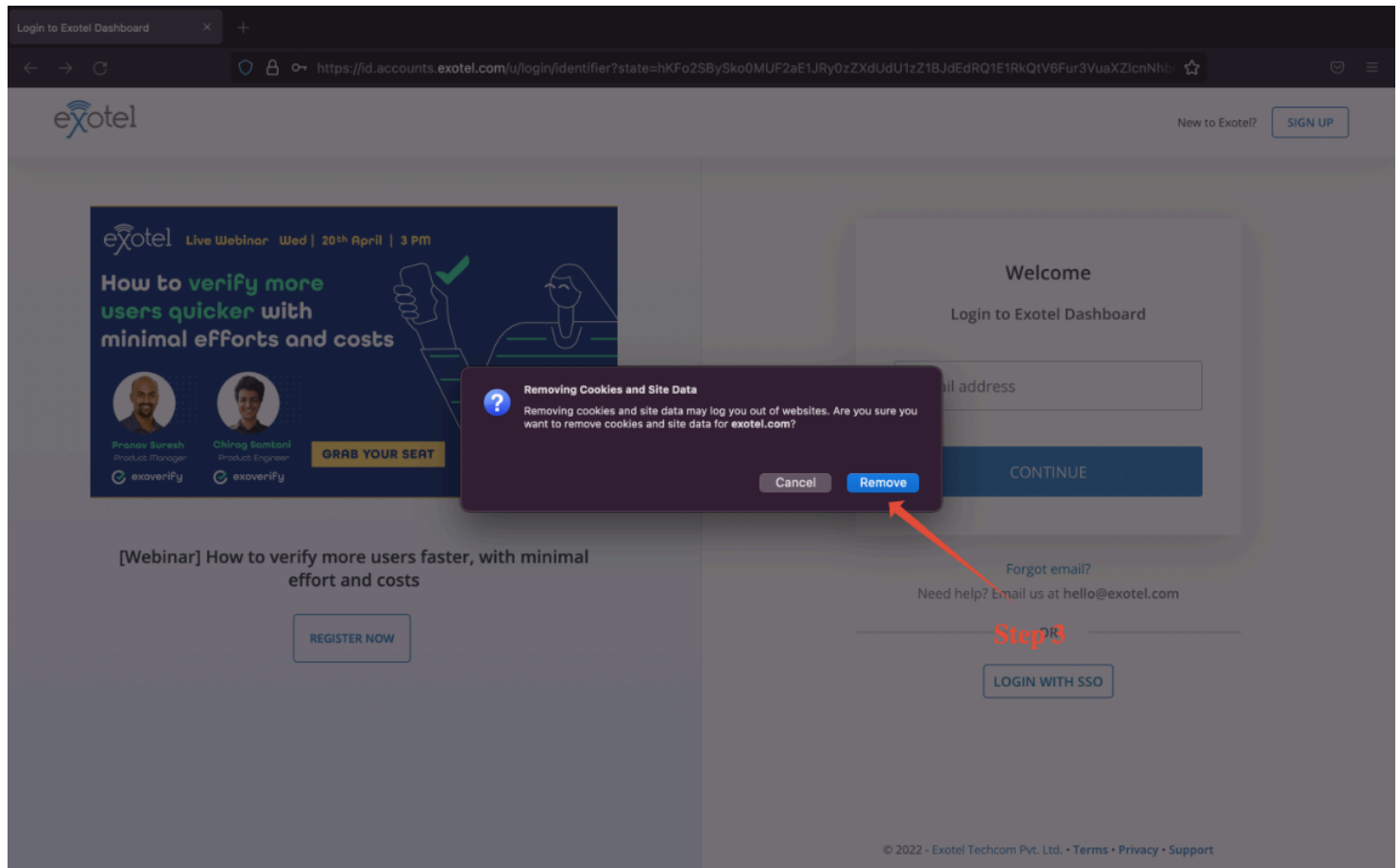
Step 1 - Go to myexotel.com and click on the lock button on the search bar.



Step 2 - Click on 'Clear cookies and site data...'



Step 3 - Click on 'Remove'



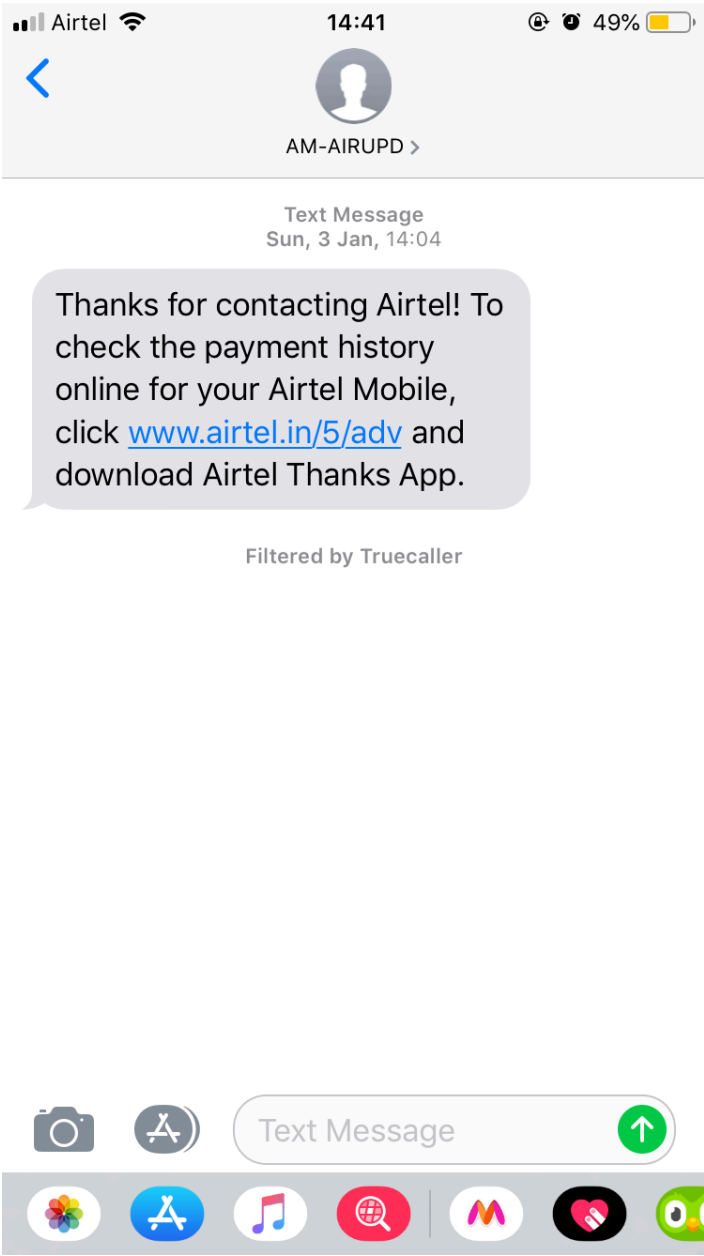
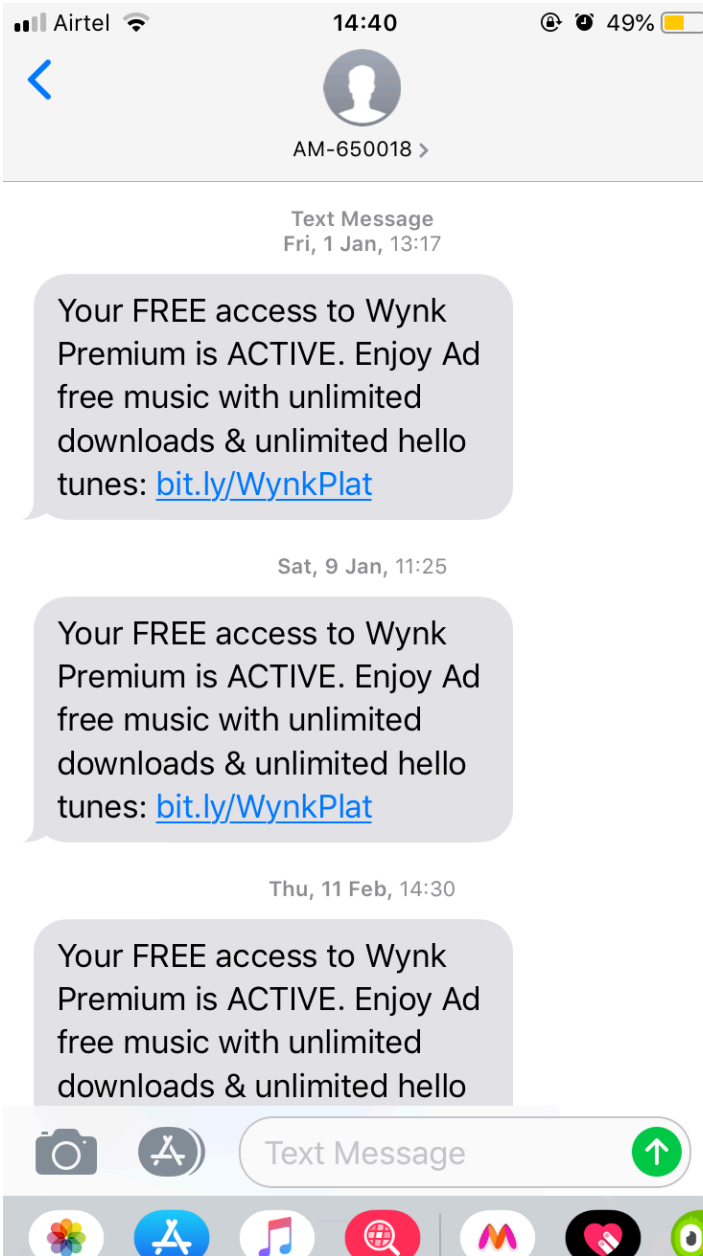
Note that these may vary as per browser versions and systems configuration so in case you're unable to follow through with any of these methods,

14.11. SMS Sender ID prefixes

In SMS, Can you tell me which are promotional prefixes and which of these are transactional?

Answer:

One can differentiate a transactional SMS from a promotional SMS based on the Sender ID it gets delivered from.

Transactional Sender ID	Promotional Sender ID
 Transactional Sender ID Airtel 14:41 49% AM-AIRUPD > Text Message Sun, 3 Jan, 14:04 Thanks for contacting Airtel! To check the payment history online for your Airtel Mobile, click www.airtel.in/5/adv and download Airtel Thanks App. Filtered by Truecaller	 Promotional Sender ID Airtel 14:40 49% AM-650018 > Text Message Fri, 1 Jan, 13:17 Your FREE access to Wynk Premium is ACTIVE. Enjoy Ad free music with unlimited downloads & unlimited hello tunes: bit.ly/WynkPlat Sat, 9 Jan, 11:25 Your FREE access to Wynk Premium is ACTIVE. Enjoy Ad free music with unlimited downloads & unlimited hello tunes: bit.ly/WynkPlat Thu, 11 Feb, 14:30 Your FREE access to Wynk Premium is ACTIVE. Enjoy Ad free music with unlimited downloads & unlimited hello

Both of them have prefixes (AM) which are automatically set by the operator delivering this particular message. Because we work with different SMS gateways who internally work with others & eventually operators who may try to send your SMS via the cheapest & best route possible, the prefix is unpredictable. These prefixes are meant to inform the recipient about the channel used in delivering the SMS. Typically, they use this information to report an NDNC violation.

The following are the list of SMS prefixes and their explanation:

Operator codes:

Service Provider	Code
Aircel, Dishnet Wireless	D
Airtel	A
BSNL	B
BPL Mobile/Loop Telecom	L
Datacom Solutions	C
HFCL Infotel	H
Idea Cellular	I
MTNL	M
Reliance Communications	R
Reliance Telecom	E
S tel	S
Shyam Telecom	Y
Spice Telecom	P
Swan Telecom	W
Tata Teleservices	T
Unitech	U
Vodafone	V

State codes that signify the origin of this SMS:

Service Circle	Code
Andhra Pradesh	A
Assam	S
Bihar	B
Delhi	D
Gujarat	G
Haryana	H
Himachal Pradesh	I
Jammu & Kashmir	J
Karnataka	X
Kerala	L
Kolkata	K
Madhya Pradesh	Y
Maharashtra	Z
Mumbai	M
North East	N
Orissa	O
Punjab	P
Rajasthan	R
Tamil Nadu	T
UP-East	E
UP-West	W
West Bengal	V

Now then, if you got an SMS from "VM-EXOTEL" - This SMS was delivered by Vodafone Mumbai. "Ak-650034" - would then be Promotional SMS by/from Airtel Karnataka.