VICIdial AI go-live checklist

Run this before an AI agent takes its first live call on your VICIdial. It assumes the AI registers as a SIP extension, the way a remote agent's phone does. Tick each box as you go.

1. Network and firewall

- [ ] Write down your VICIdial server's public IP, the SIP port (5060 for chan_sip; 5060 or 5061 for PJSIP) and the AI platform's IP addresses.
- [ ] Firewall: allow SIP (UDP/TCP 5060 or 5061) and RTP audio (UDP 10000 to 20000, or the range in your rtp.conf) from the AI platform's IPs only.
- [ ] If you run both stacks, set Allowed SIP Stacks in Admin to SIP_and_PJSIP, and confirm which one the AI registers on.
- [ ] Ask the AI vendor which IPs they call from, and whether those IPs ever change.

2. The AI as an agent

- [ ] Create a phone in Admin, Phones: extension (e.g. 9001), dial plan number, server IP, protocol and a long, random registration password.
- [ ] Create a user for the AI, log it into the right campaign, and give it a name your supervisors will recognise on the real-time report.
- [ ] Check the registration is live in the Asterisk CLI: sip show peers, or pjsip show endpoints.
- [ ] Decide what happens if the AI goes offline: the dialer should route to the next available human agent.

3. Campaign settings

- [ ] Campaign Recording set to ALLCALLS or ALLFORCE, so every AI call is recorded.
- [ ] AMD decided: route through 8369 for answering machine detection, or 8368 without it, and know which statuses reach the AI.
- [ ] Transfer target set: the in-group or closer the AI hands qualified calls to, with someone logged in to take them.
- [ ] Start the dial level low for the first hour, then raise it once transfers are landing cleanly.

4. Test calls to your own phones

- [ ] Two-way audio on every test. One-way audio or silence usually means NAT or blocked RTP ports.
- [ ] The AI answers without a long pause after the caller speaks.
- [ ] Warm transfer: the closer hears the lead, and the lead isn't dropped or left in silence.
- [ ] Hang up mid-call: the AI extension goes back to ready.
- [ ] The recording plays back with both sides of the call.
- [ ] Status, transcript and any notes land where you expect: the VICIdial status, your CRM, your buyer's system.

5. Compliance before live leads

- [ ] Prior express written consent on file for every lead you'll dial for marketing with an AI voice. The FCC ruled in February 2024 that AI-generated voices count as artificial voices under the TCPA.
- [ ] The AI says who it is and which company it's calling for at the start of the call.
- [ ] Recording disclosure on calls into all-party-consent states.
- [ ] Calling hours: 8am to 9pm in the lead's local time.
- [ ] A mid-call "stop calling me" gets flagged and goes on your internal do-not-call list.
- [ ] Every call recorded and kept, so you can show a buyer or a regulator what was said.

6. The first live hour

- [ ] Listen to the first 10 calls live and read their transcripts.
- [ ] Fix the script lines that confuse people, then scale the dial level.

Klariqo connects to VICIdial in about 10 minutes and turns every recorded call into a Klariqo Call Record: the transcript, a digital signature and an independent timestamp, which a buyer can check at verify.klariqo.com. Your first 10,000 recorded calls are free: app.klariqo.com/onboarding