Smart Dial 3.0

Technical & Feature Document
Document Version: 3.0

Revision History

The table below provides the revision history of this document

Date	Version	Author	Approved By	Description
May-2020	**V3.0**			**Tech. Flow & Features**

TABLE OF CONTENTS

1. Preface

1.1 Purpose of this document

#1.1.a This document is a generic Technical Design Document for use by “Essence Technology Automation India Pvt. Ltd.”. It provides guidance and template material which is intended to assist the relevant management or production staff or support staff, in producing a project specific Technical Design Document. It is also useful background reading for anyone involved in developing or monitoring the existing smart dialer version.

1.2 Use of this document

#1.2.a This Preface is addressed to the users of this generic document and is not meant to be retained in any project specific Technical Design Document based on it.

#1.2.b This document may be modified or overwritten directly at each occurrence and it depends of the discretion of the user.

1.3 Overview

#1.3.a This preface is for information only (in very specific term the purpose & the use).

1.4 Basis of this Document

#1.4.a It attempts to set standards and create a consistent approach to the design and development of systems across the Program. It will enable the Program to benefit from ‘economies of scale’ and a consistency in the approach to building and deploying systems. Important issues that need to be considered include the architecture of systems, links to legacy systems, contemporary approaches to design (Object Oriented Program), aims for code re-use and the need to develop systems that will work on an operational basis over many years and the associated desire to make such systems easily supportable and affordable.

#1.4.b A key point will be to build on the work already carried out in smart dialer and its predecessor programs, where a large number of specific ‘technical’ developments were undertaken looking at, for example, standards for data exchange, such as APIs, and the introduction of contemporary technologies and infrastructures.

2. Client Admin

 # Authentication & Dashboard View

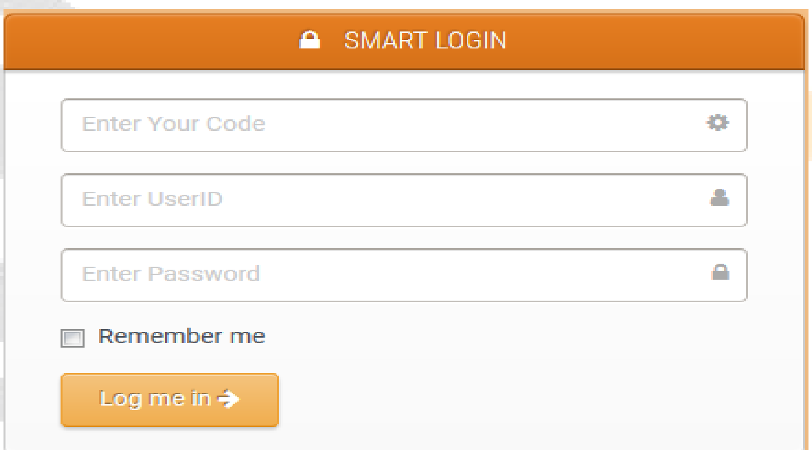
2.1.a.1 Login Module -

Description - Login page enables the registered users to enter the Client panel in form of entering credentials like client code, userid and password.

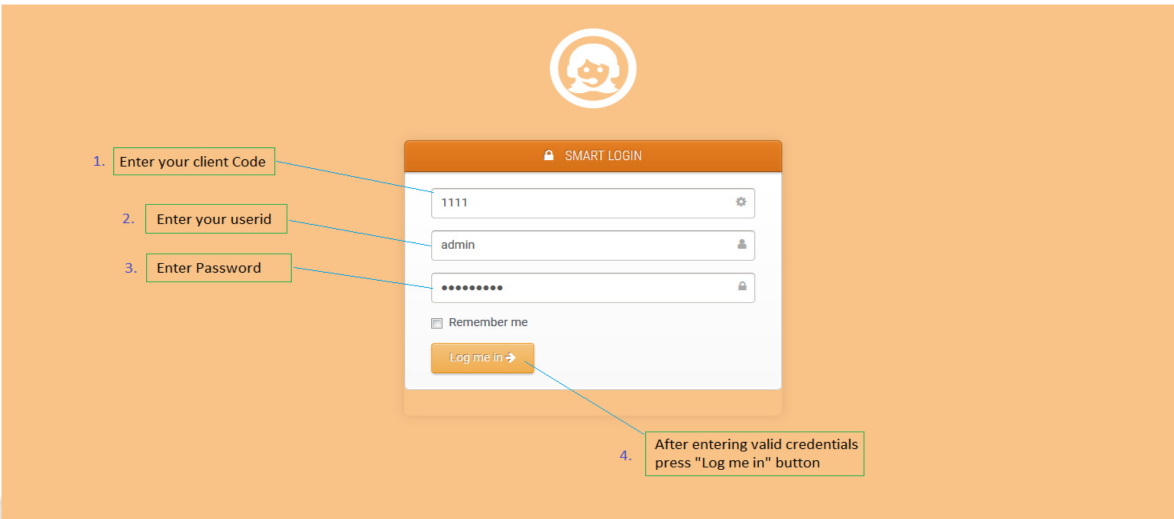
To perform logging via login module, the phases follows as.

Step1: Open any one of the mentioned browsers Chromium or Firefox.

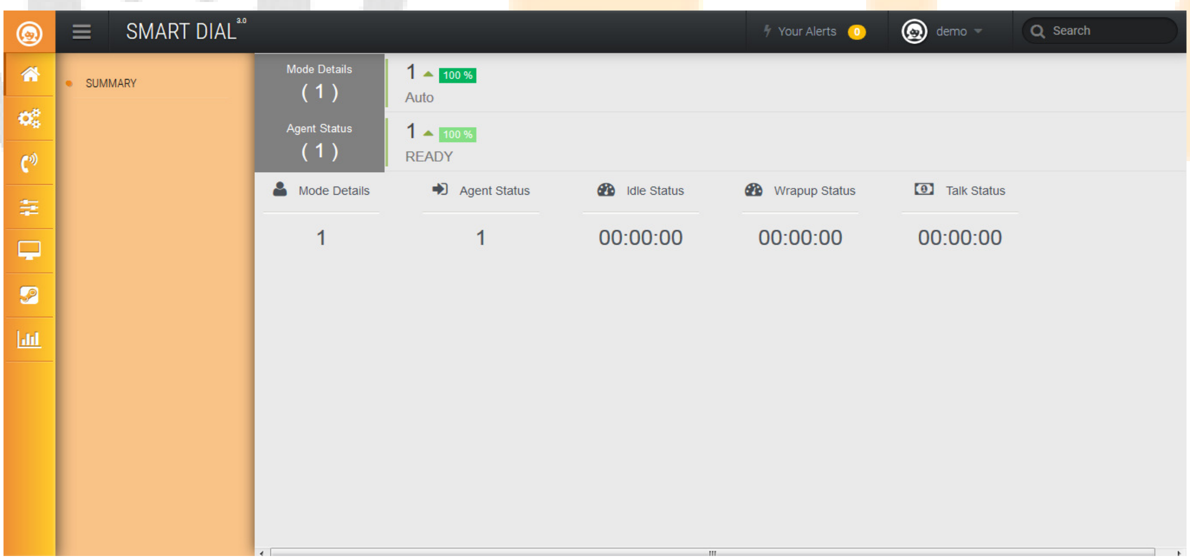
Step2: Once the browser is opened, type the url http://xxx.xxx.xxxx.xxx/smart/ on search bar, which results the login page will appear below



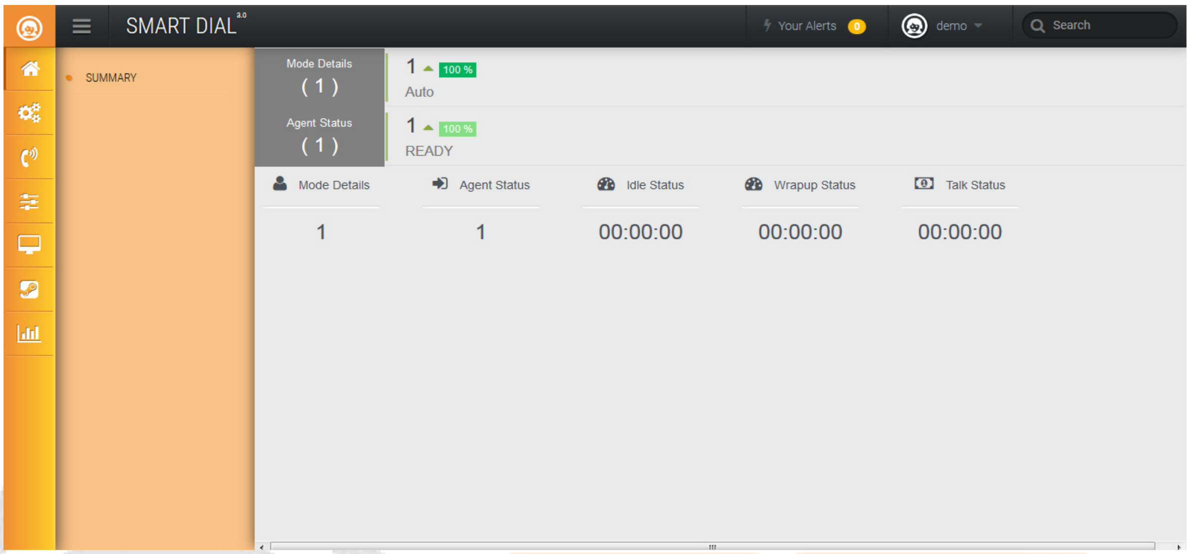
Step3: Now in the textboxes below, enter the credentials and then press “Log me in” button



Step4: Finally the admin user is logged in to the home page or Dashboard page.



2.1.a.2 Dashboard View



It depicts the brief pertaining to various activities taking place in the agents, including

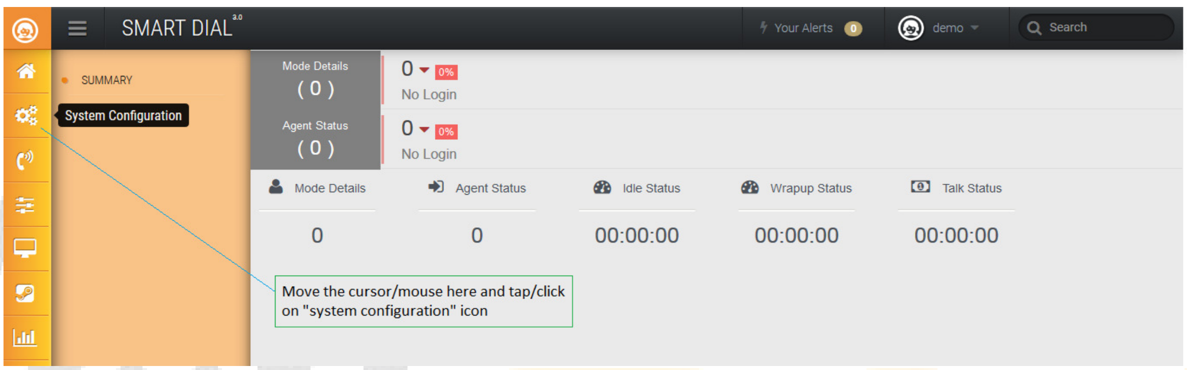
1. Mode Details
2. Agent Status
3. Idle Status
4. Wrapup Status
5. Talk Status

System Configuration

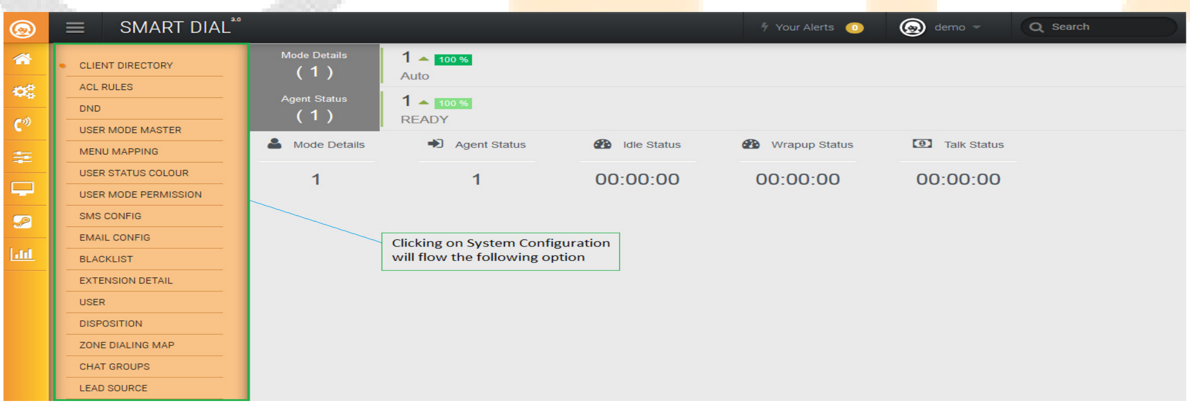
System configuration enables users, to manually configure system settings which are significant to all mechanisms availed in the Product.

To reach system configuration follow the steps as below :-

Step1: Consider the steps of Logging to panel via login module
Step2: Then move the cursor/mouse towards system configuration on left



Step3: After clicking on system configuration, the flow with split into child options mentioned below :

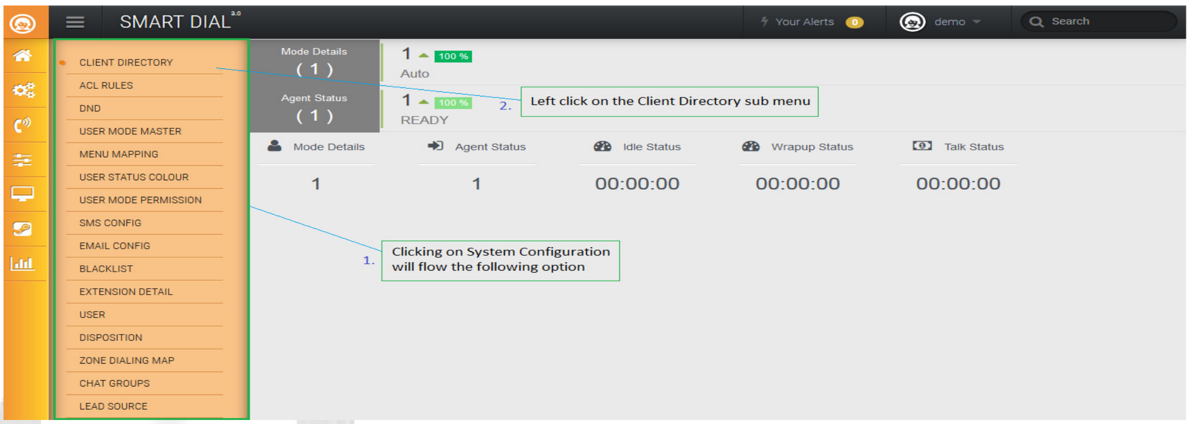


<u>Now lets explore the sub-parts of system configuration</u>

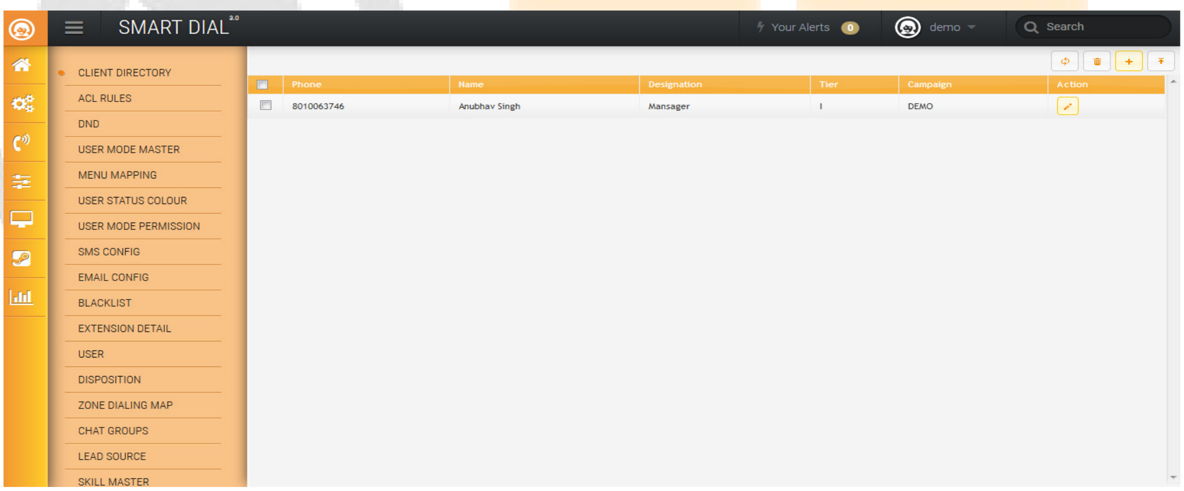
2.1.a.3 Client Directory - The client directory enables users to add information of a client with respect to phone number, name, designation and tier corresponds to a particular campaign or without campaign.

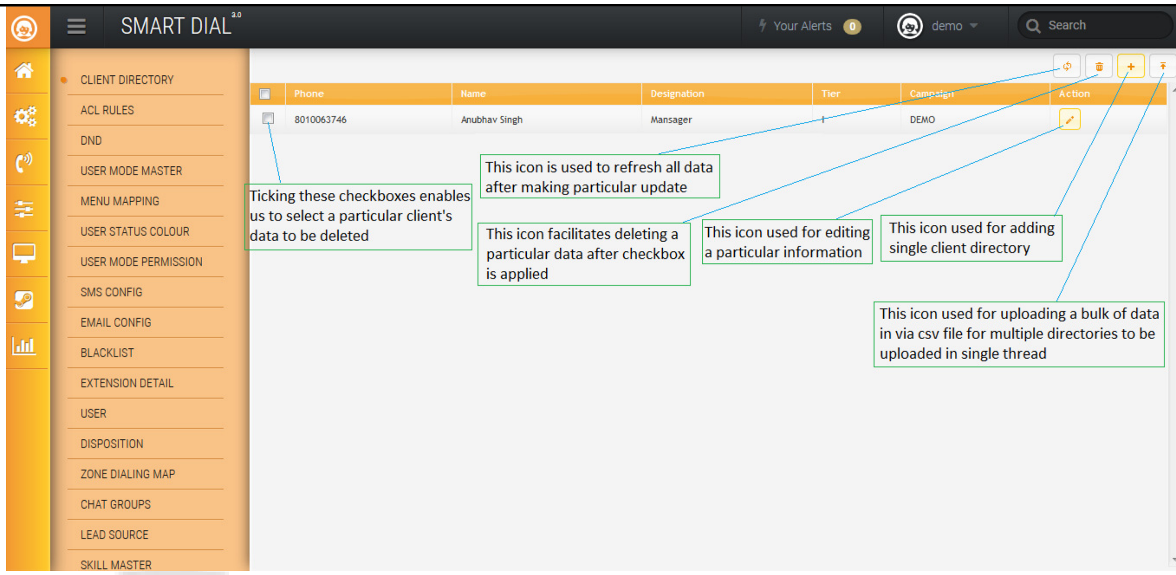
To go to client directory, follow the steps as below :-

Step1: Left click on the client directory option of the menu system configuration.



Step2: After clicking on client directory button, the client directory page will appear as below :-





__Lets explore each facilities of client directory:-__

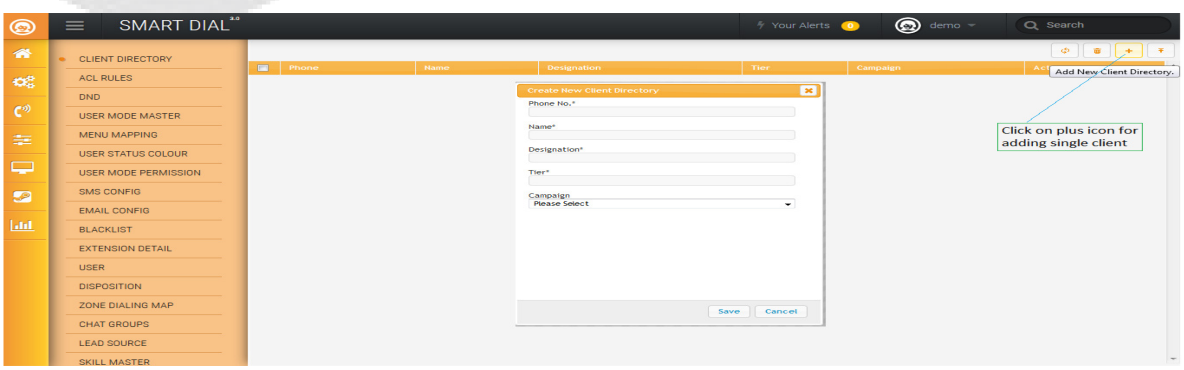
1. ***__Adding a new single client.__***

To add a new client the steps are as follows:

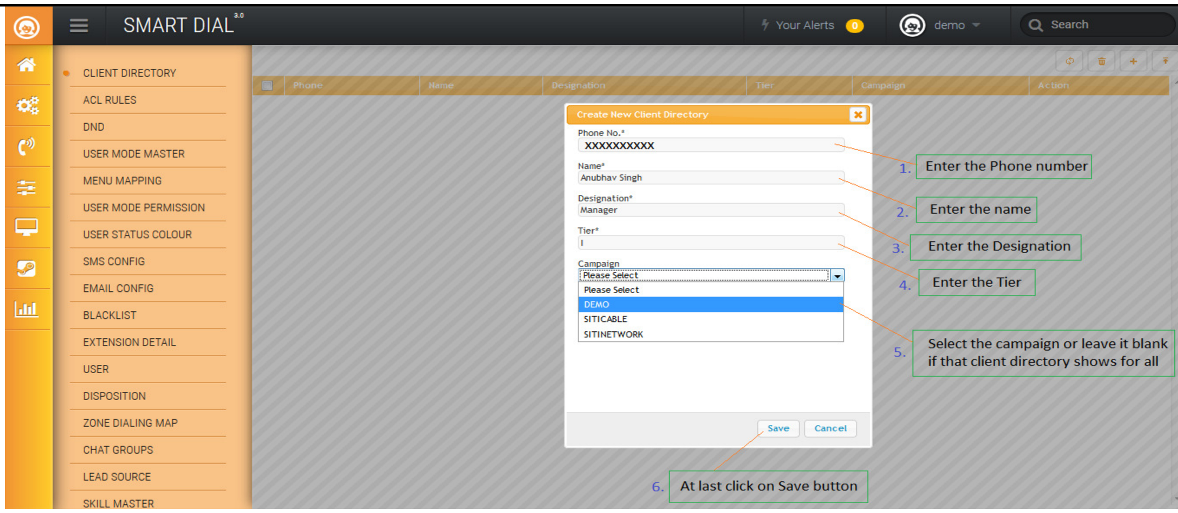
Step1: Consider the steps of going to client directory as mentioned above.

Step2: After the appearances of client directory page, Click on add + icon.

Step3: The dialog box of adding new client will appear below.

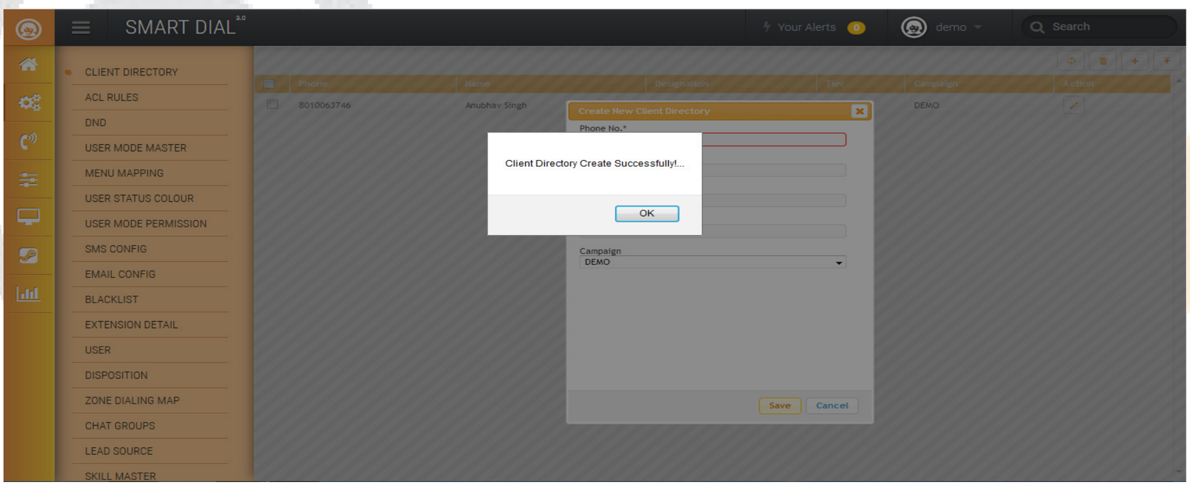


Step4: Now add the desired information in form of phone number, name, designation and tier with/without campaign.

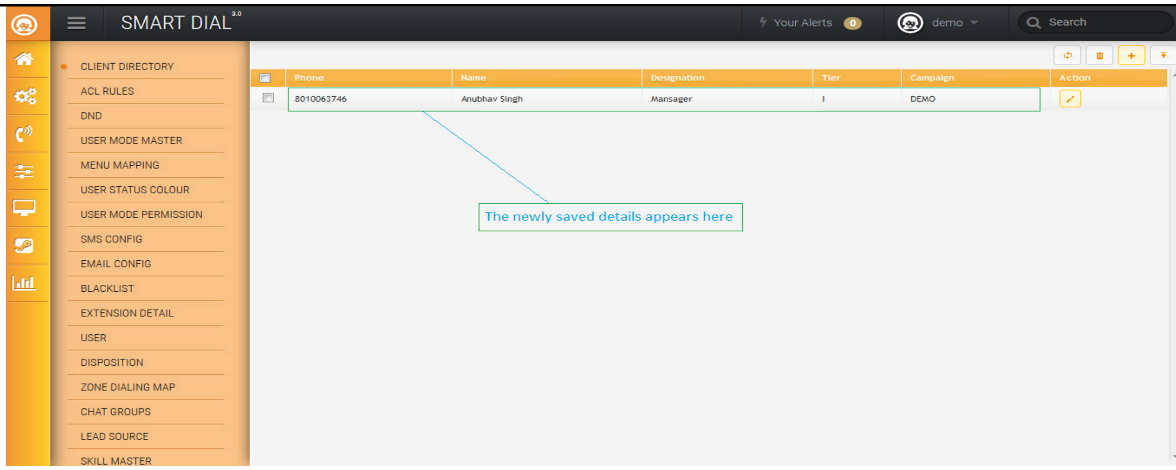


Step5: Once done with entering the credentials above, click on save button.

Step6: Once save button is clicked, the data will be successfully saved as below.

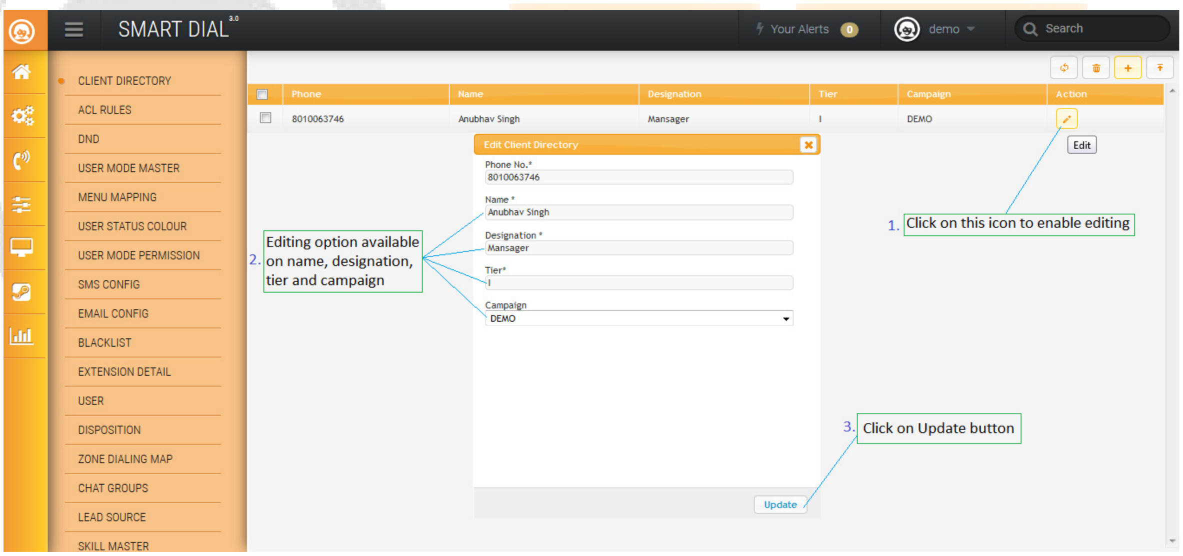


Step7: Now press the "Ok" button of popup dialog box, once clicked it appears to be the number have been saved in the directory as below :-



2. Editing the data in client directory:-

Step1: Click on the pencil like icon to open editing dialog box.

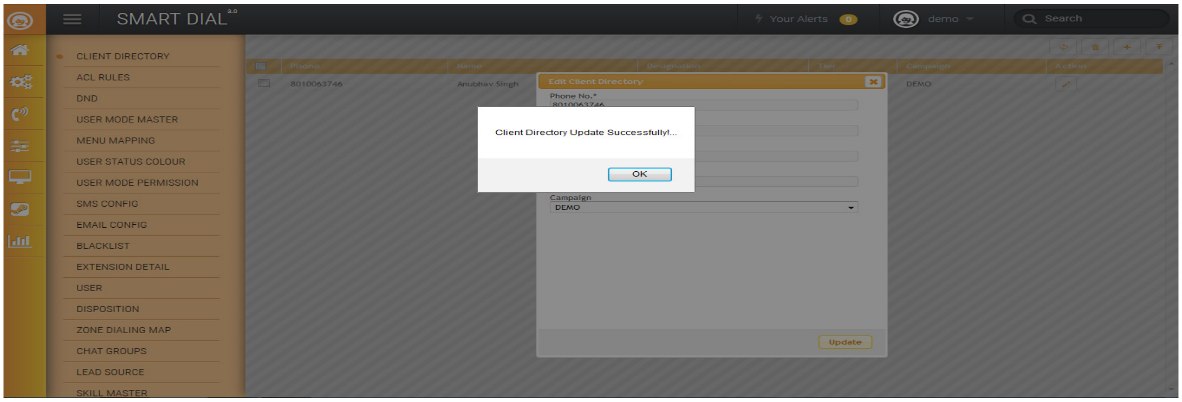


Step2: After clicking on that icon, it will open up a dialog box that enables editing of data.

Step3: Now in the above dialog box editing option available on name, designation, tier and campaign.

Step4: Once done with renaming, click on the update button to save the renamed data.

Step5: Once update button is clicked, similar pop-up dialog box will occur below.

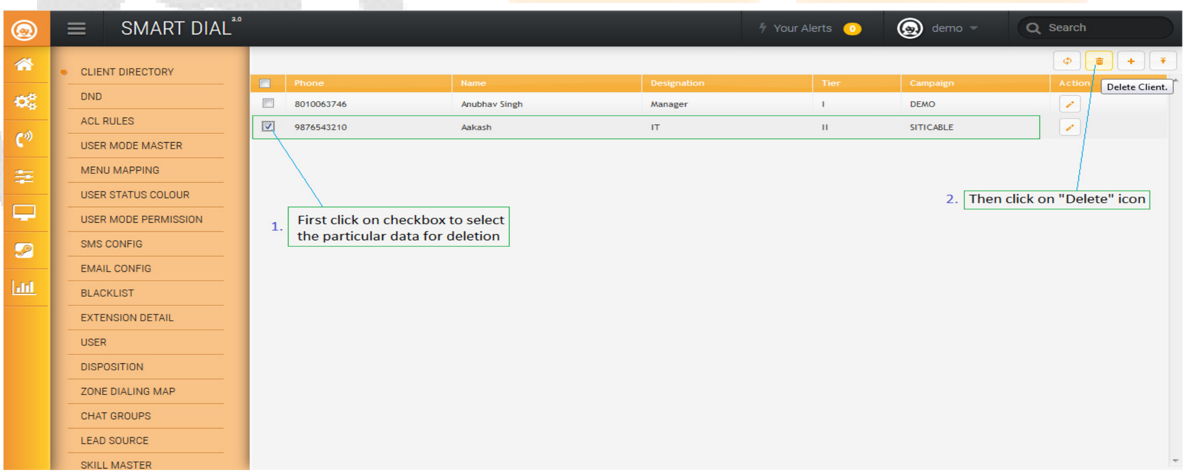


Step6: Now press the ok button, which will result data changes have been successful.

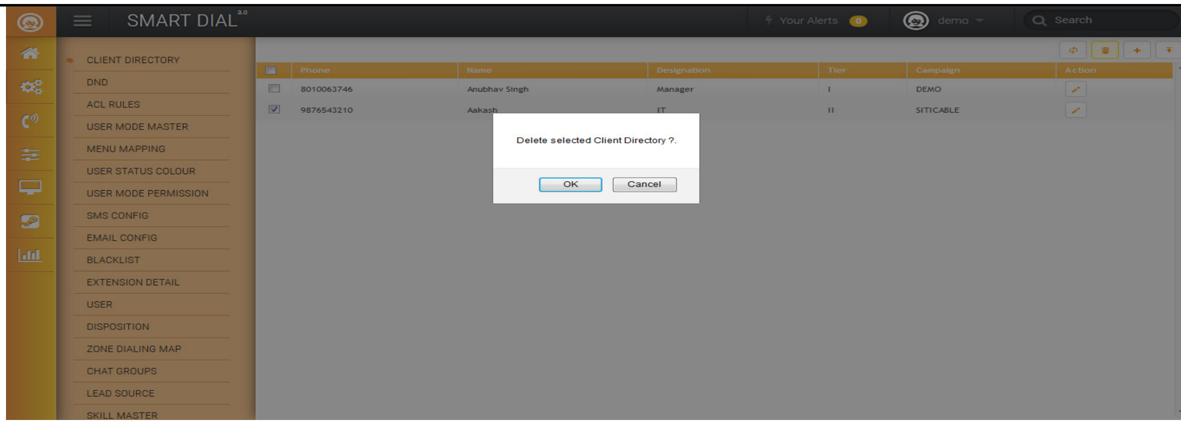
3. Deleting a client from client directory:-

Step1: Consider the steps of entering the client directory.

Step2: Now choose to tick a checkbox near that relates to a client number.



Step3: After clicking the delete icon, a popup message asking a confirmation for delete

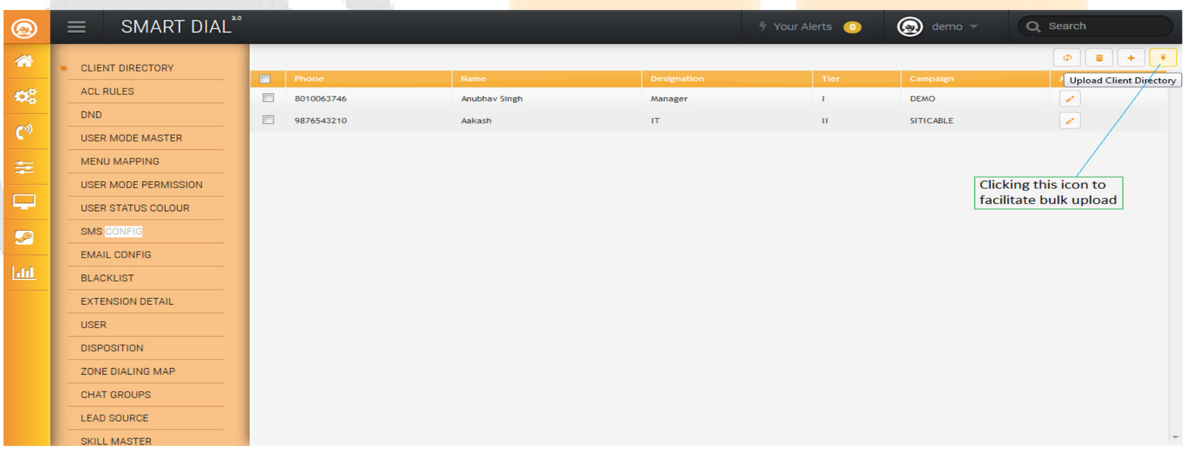


Step4: Now click on the "Ok" button, which will result removal of that data.

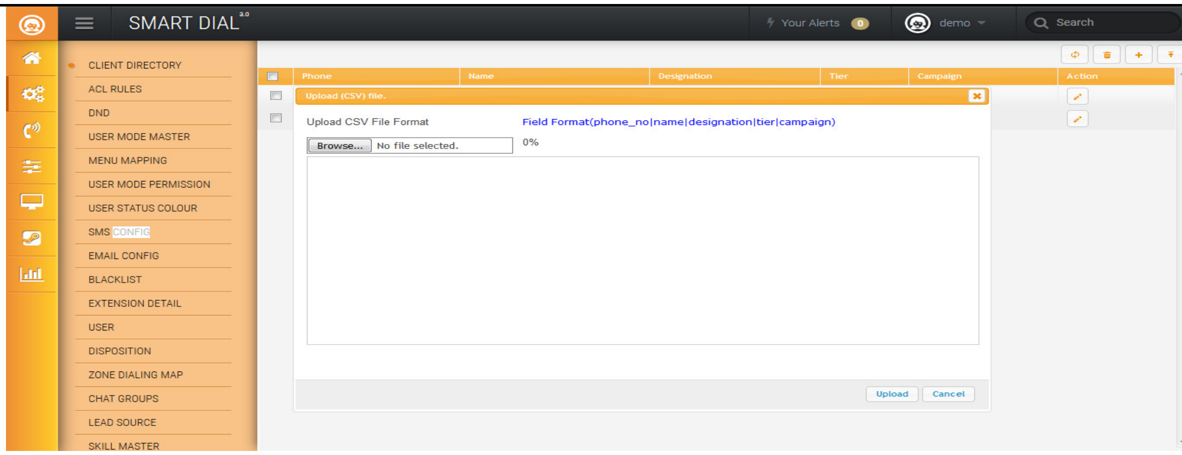
4. Making bulk upload to client directory

Step1: Consider the steps of entering the client directory

Step2: On the client directory page click on upload button highlighted in the pic below



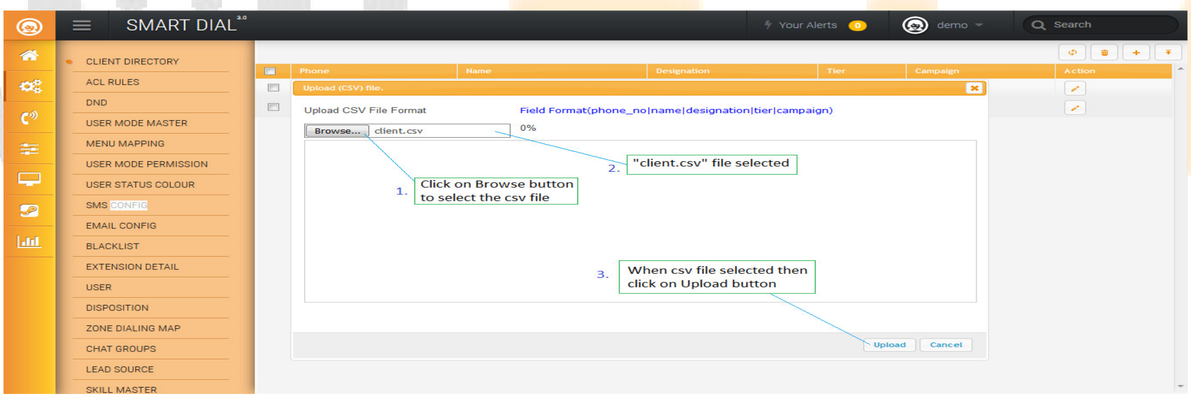
Step3: Once upload button is clicked, a mini dialog box will appear as below



Step4: User is supposed to create a csv file via excel sheet in same format mentioned in the dialog box :

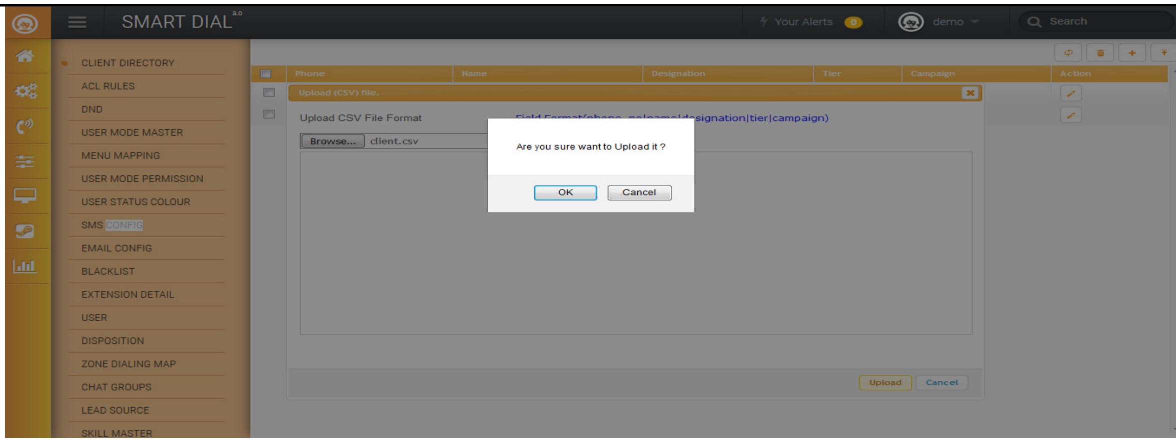
	A	B	C	D	E
1	phone_no	name	designation	tier	campaign
2	7654321900	Akhil	Quality	II	Demo
3	9889675543	Rahul	Manager	II	
4					

Step5: Once the csv file have been created, it is to be uploaded in via the dialog box, to do it click on the "Browse" button, which will enable another dialog box to select the csv file

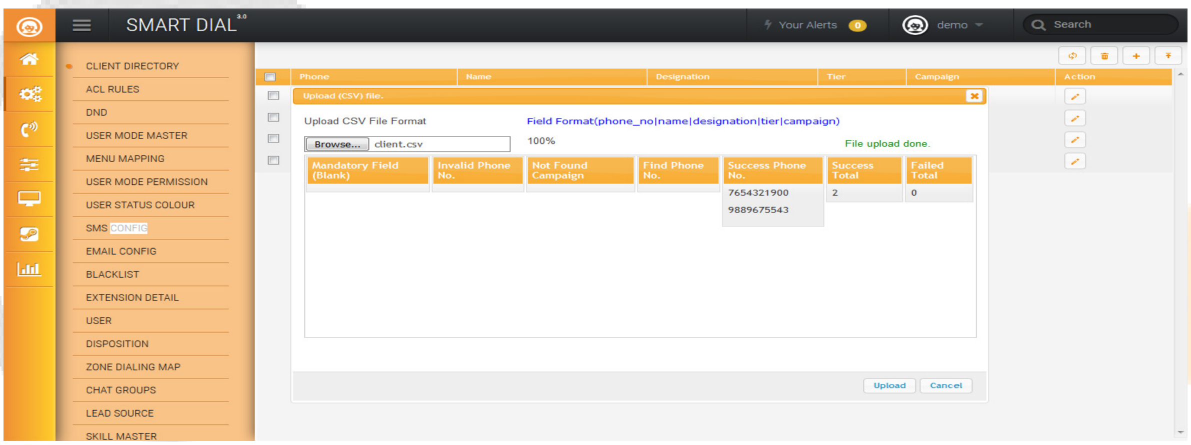


Step6: Once file selected then click on upload button.

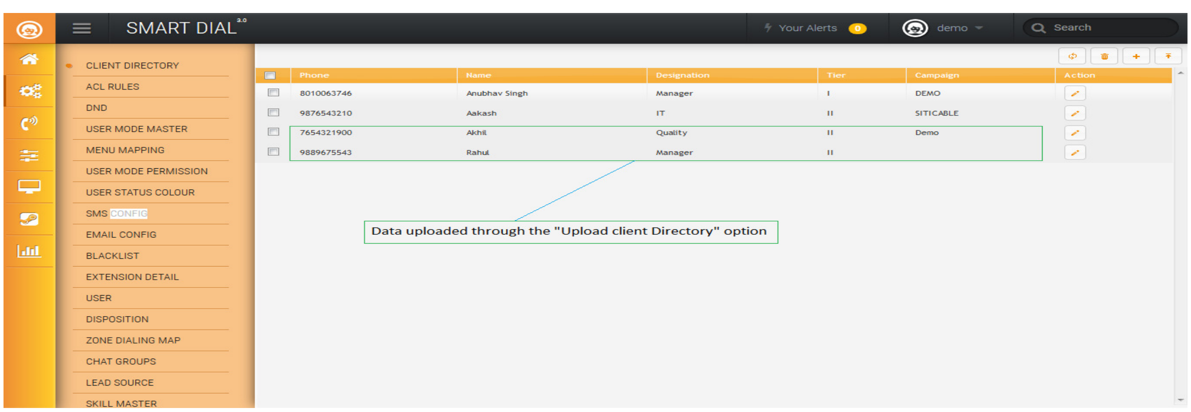
Step7: After click on upload button, a popup window will ask a confirmation message.



Step8: Now click on "Ok" button, once ok button is clicked, those numbers will be uploaded showing a message in green text "File uploads done".



Step9: Finally we can see the uploaded results below :-



2.1.a.4 DND:

This mechanism facilitates blocking of a particular number or a bulk of numbers, so that blocked numbers will not dial through the system.

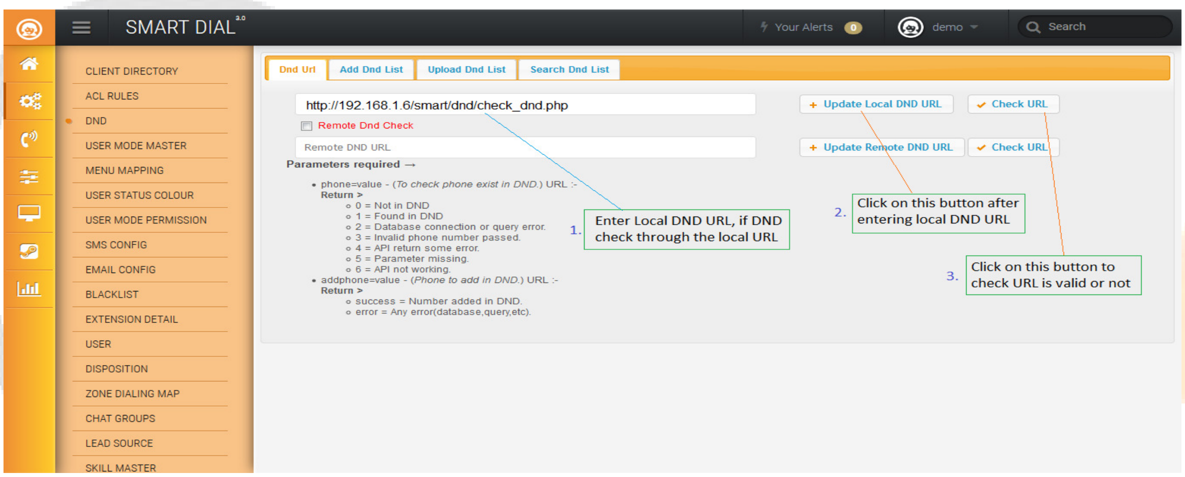
1. Local DND Check - This mechanism is used to check the DND numbers in local server (blocked by local

Personnel/employee). Seeking not to receive calls on their number.

Scenario - In order for DND to take effect, it is required to enable DND URL and DNC in campaign section

Step1: Left click on the DND option of the menu system configuration.

Step2: After clicking on DND sub menu, the DND page will appear as below :-



Step3: Enter Local DND URL, if DND check through the local URL

Step4: Then click on “Update Local DND URL” for set the Local DND URL

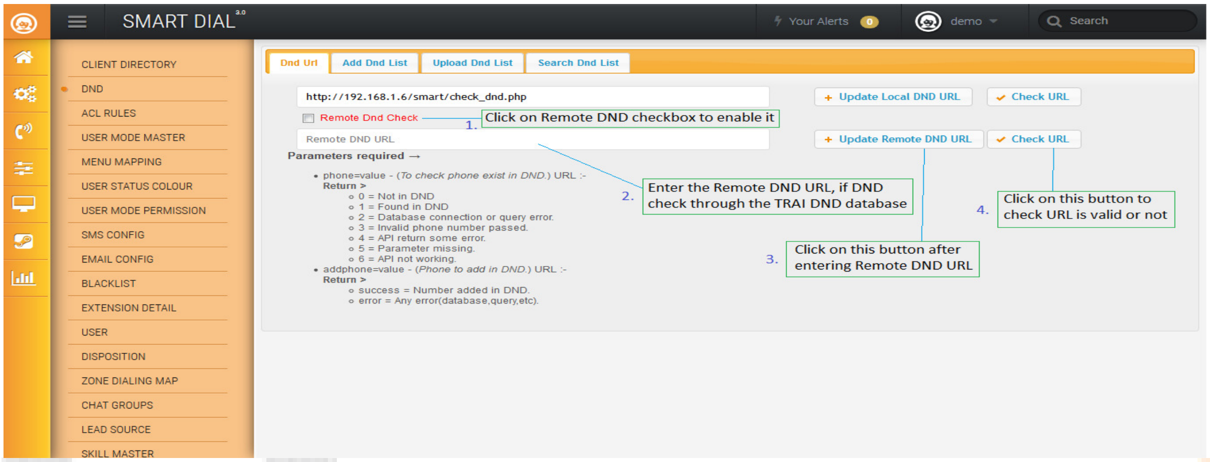
Step5: Click on “Check URL” button to check that URL is valid or not.

2. Remote DND Check - This mechanism is used to check the DND numbers offered from TRAI (Retail/Citizens blocking a

Number). Seeking not to receive calls on their number.

Step1: Left click on the DND option of the menu system configuration.

Step2: After clicking on DND sub menu, the DND page will appear as below :-



Step3: Click on “Remote DND check” checkbox to enable it.

Step4: Then Enter the Remote DND URL, if DND check through the TRAI DND database

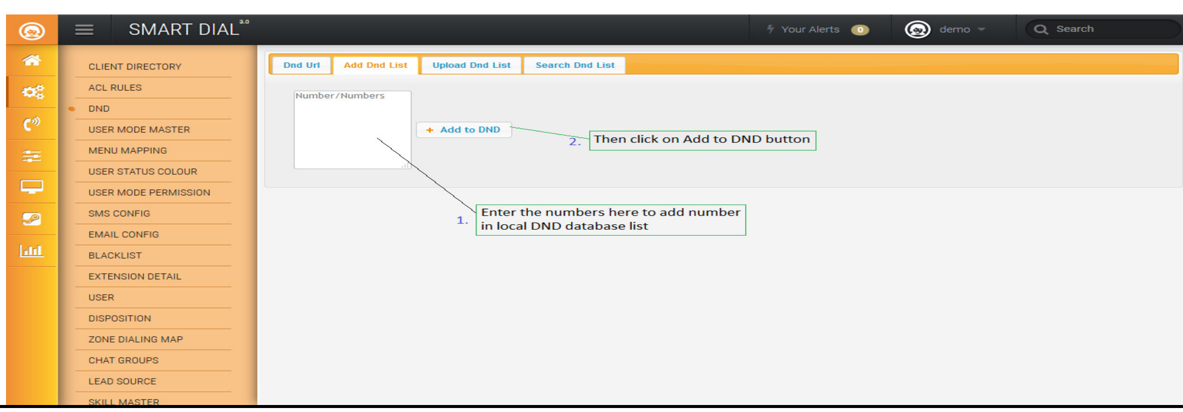
Step5: Then click on “Update Remote DND URL” for set the Remote DND URL

Step6: Click on “Check URL” button to check that URL is valid or not

3. To Add a single number in DND follow the s given below:-

Step1: Go to DND sub menu, of system configuration.

Step2: Then click on “Add DND List” tab, which is after the DND URL tab



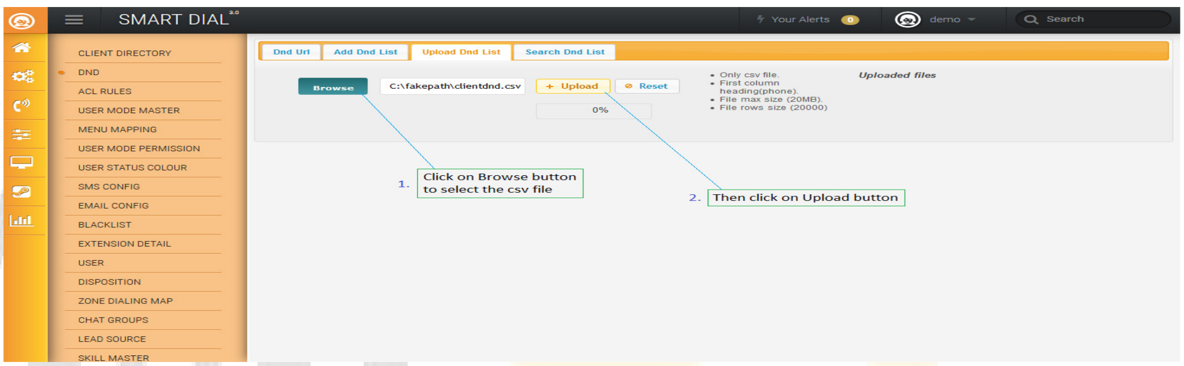
Step3: Now type a number in box and click on “Add to DND”.

Step4: After clicking on ‘Add to DND’ it shows ‘ok’ which indicates the number is added to DND.

4. To add bulk of numbers in DID follow the s:-

Step1: Go to DND sub menu, of system configuration.

Step2: Then click on “Upload DND List” tab, which is after the `Add DND List` tab



Step3: User is supposed to create a csv file via excel sheet in same format mentioned in the dialog box :

1	phone
2	7654321900
3	9889675543

Step4: Once the csv file have been created, it is to be uploaded in via the dialog box, to do it click on the “Browse” button, which will enable another dialog box to select the csv file

Step5: Once file selected then click on upload button.

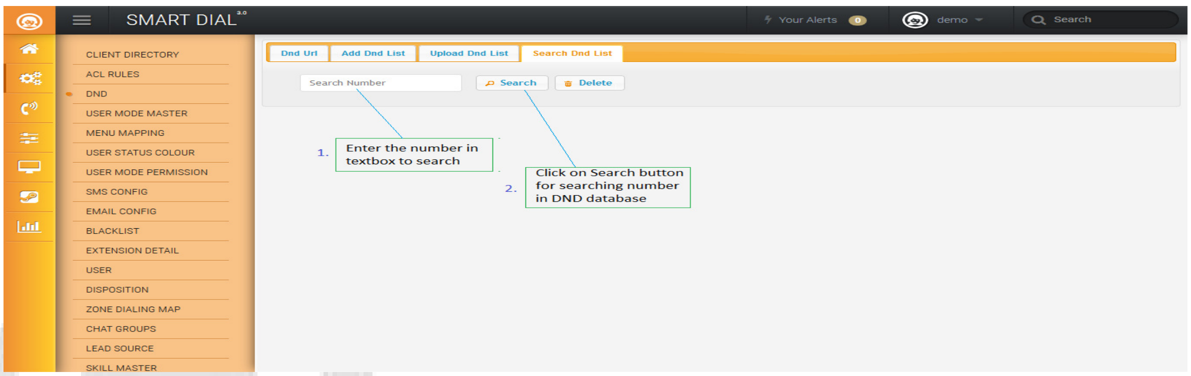
Step6: After click on upload button, a popup window will ask a confirmation message.

Step7: Now click on “Ok” button, once ok button is clicked, those numbers will be uploaded with immediate effect.

5. To search a number in local DND database:

Step1: Go to DND sub menu, of system configuration.

Step2: Then click on "Search DND List" tab, which is after the `Upload DND List` tab



Step3: Enter/type a number in search textbox.

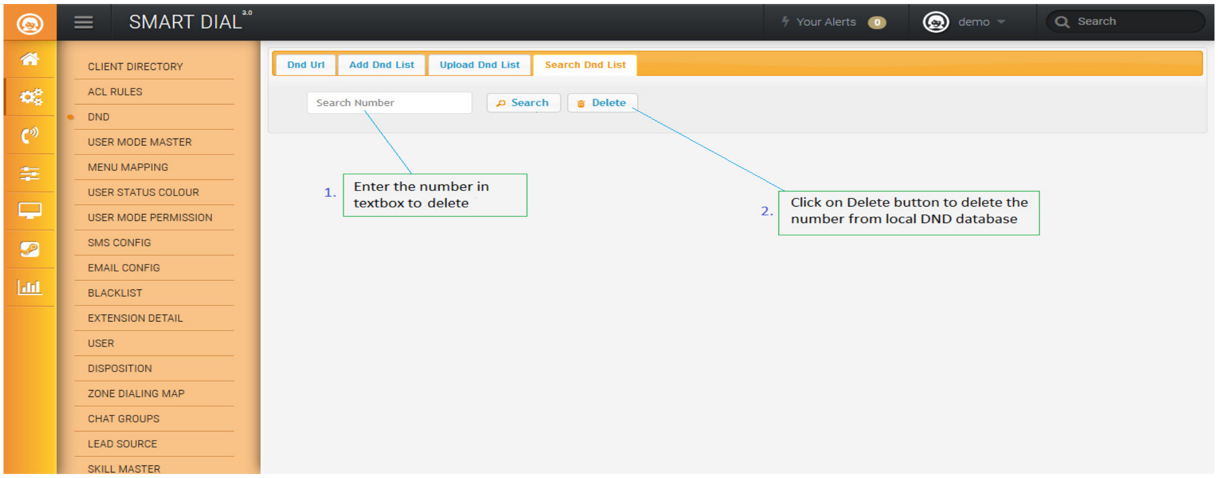
Step4: Click on Search Button.

Step5: If number available in local DND database then message shows as "Found in dnc list" otherwise message shows that "Not found in dnc list"

6. To delete a number from local DND database:

Step1: Go to DND sub menu, of system configuration.

Step2: Then click on "Search DND List" tab, which is after the `Upload DND List` tab



Step3: Enter/type a number in search textbox.

Step4: Click on Delete Button.

Step5: After clicking on Delete button, a popup window asking a confirmation message for delete

Step6: Now click on “Ok” button, once ok button is clicked, then that number will be deleted with immediate effect.

2.1.a.5 ACL Rules:

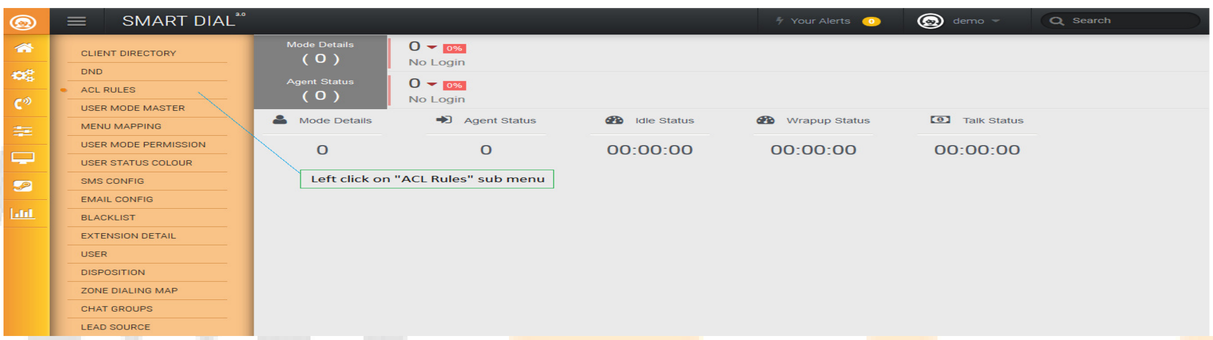
It is used to allow and restrict login to agent from server.

<u>Note:</u> It is needed to tap reload button after changes have been made.

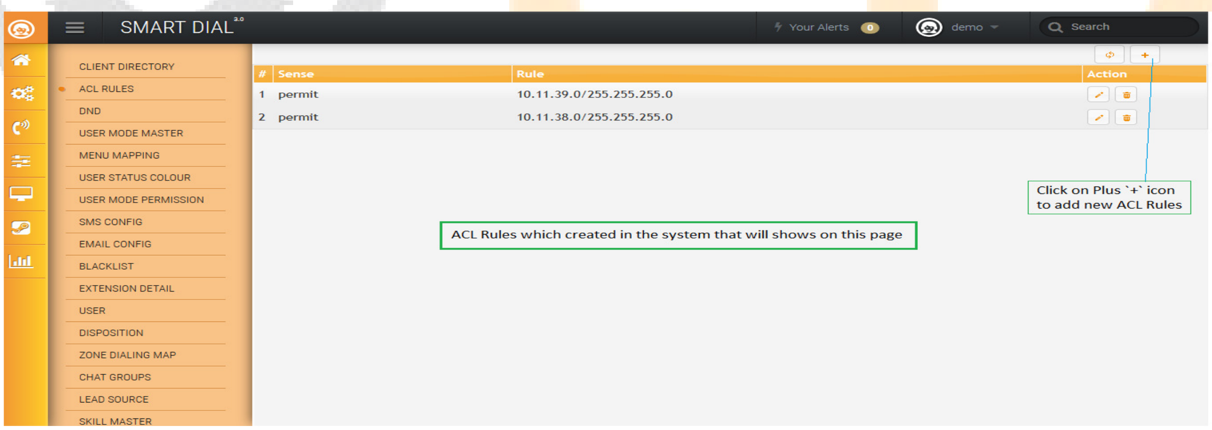
In "Extension Detail" Module – There is a checkbox titled ACL, if it is ticked then ACL rules will be applicable for that extension/SIP else any it will enable login to agents via any PC of any IP address series.

1. The walkthrough of adding/previewing ACL is followed as :

Step1: Go to system configuration, Hit ACL Rules sub menu.

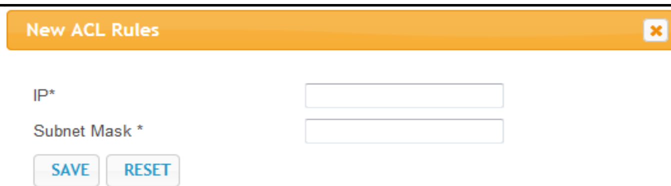


Step2: Now the ACL configuration page appears as follow:

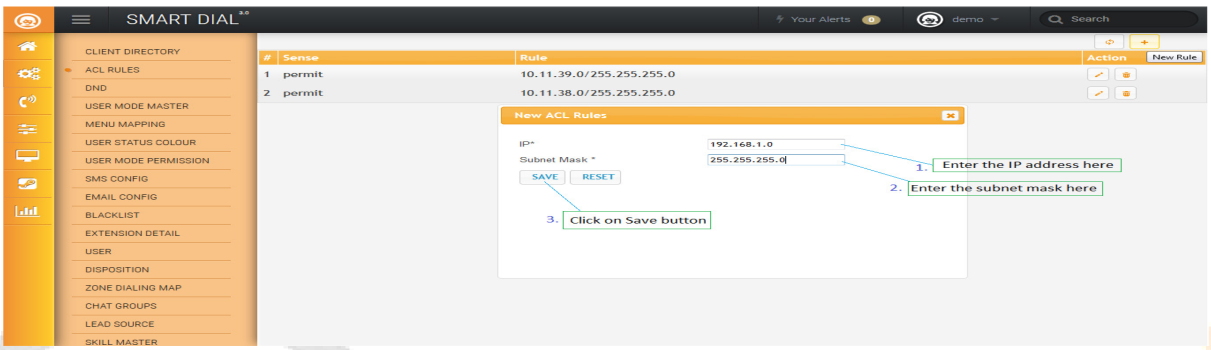


Step3: To add new IP in ACL, click on '+' button in ACL Page

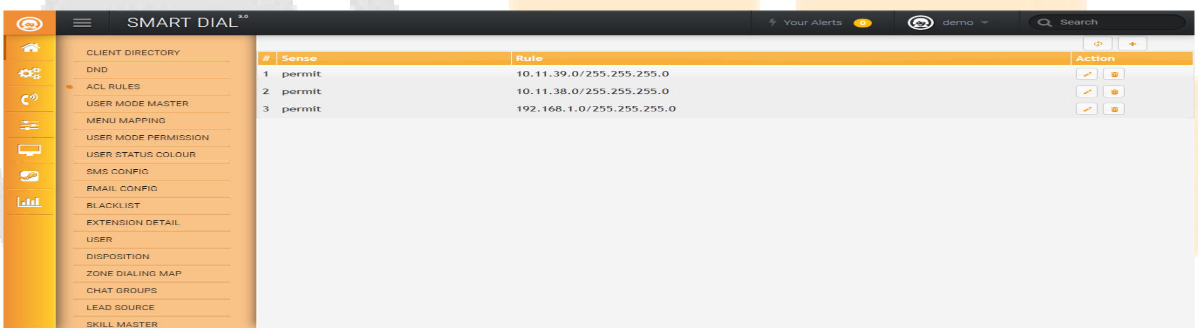
Step4: Then ACL mini dialog box appears as below :-



Step5: Now add a valid IP address and hit/click save button



Step6: We can see the a new record is added :-



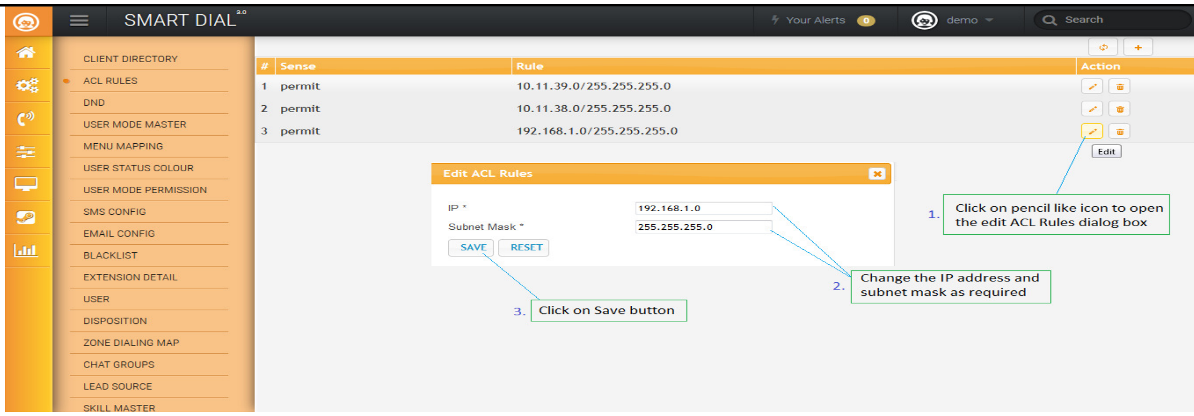
2. Edit ACL Rules:

This mechanism enables modifying a saved ACL Rules.

Steps to edit ACL are as follows :-

Step1: Go to system configuration, Hit ACL Rules sub menu

Step2: Now the ACL configuration page appears as below => Click on the edit icon, to open edit dialog box.



Step3: Now in the dialog box, interchange the digits, click save button

Step4: Now we can notice the changes has been done

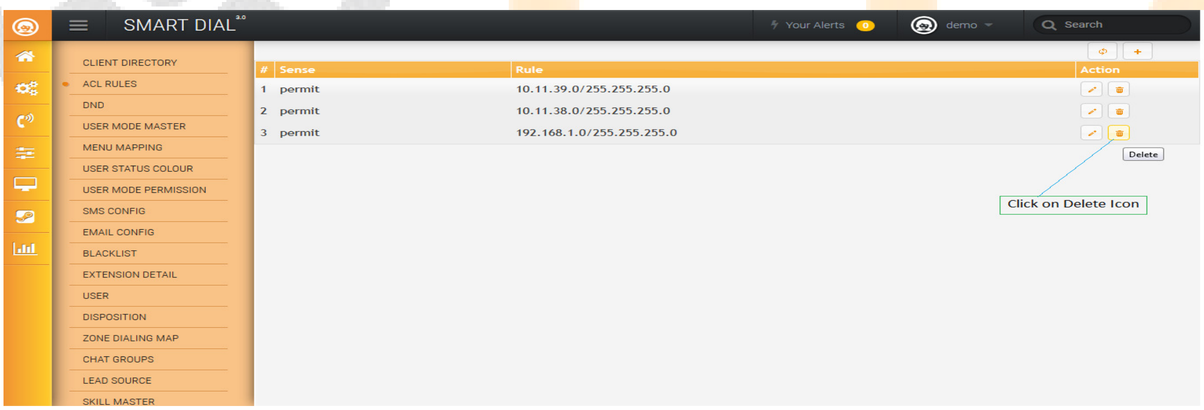
3. Delete ACL Rules:

This mechanism enables deleting a saved ACL Rules.

Steps to delete ACL are as follows :-

Step1: Go to system configuration, Hit ACL Rules sub menu

Step2: Now the ACL configuration page appears as below => Click on the "Delete" icon



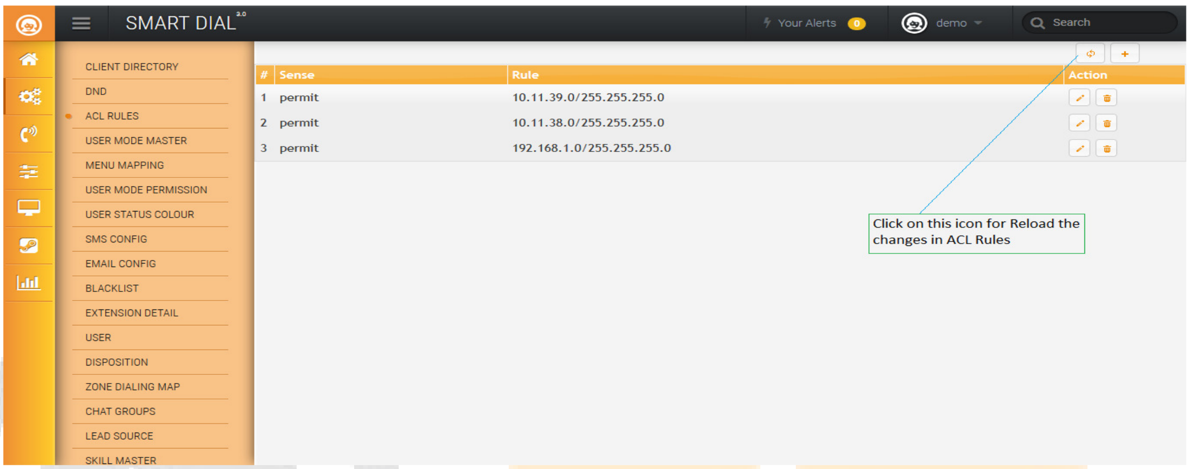
Step3: After click on Delete icon, a popup window will ask a confirmation message for delete.

Step4: Now click on "Ok" button, once ok button is clicked, then that number will be deleted with immediate effect.

4. Reload Asterisk after the changes in ACL Rules:

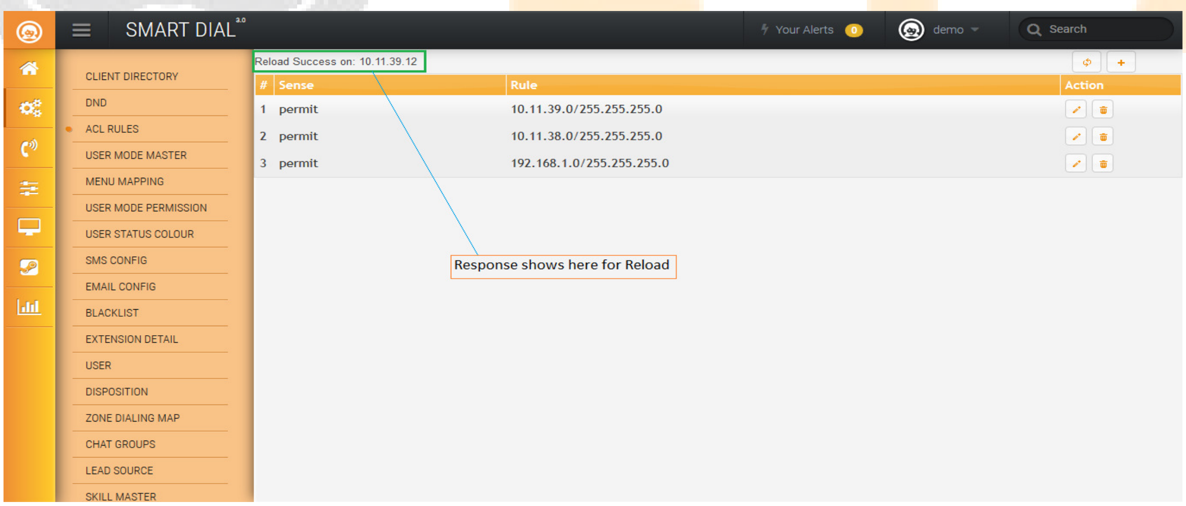
Step1: Go to system configuration, Hit ACL Rules sub menu

Step2: Now the ACL configuration page appears as below => Click on the “Reload Asterisk” icon



Step3: After click on “Reload Asterisk” icon, a popup window will ask a confirmation message for reload.

Step4: Now click on “Ok” button, once ok button is clicked, then the response shows on ACL Rules page as follows:



2.1.a.6 User Mode Master:

This module enables to customize user modes:

By default modes namely Auto, Manual, Callback, Progressive, MO, Preview, and Break which are created in the back-end.

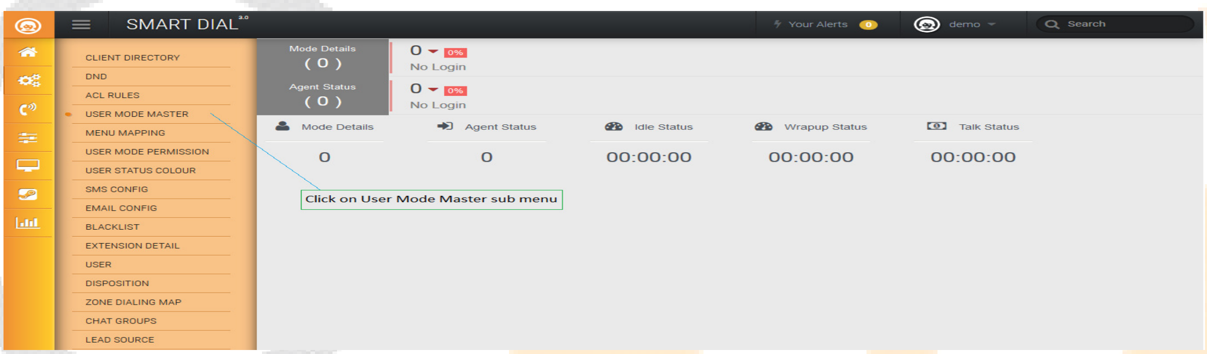
And it also features include :-

(i) Creating additional mode in as subdivision of break mode.
(ii) Enabling/Disabling Recall permission.
(iii) Deleting additional created modes.

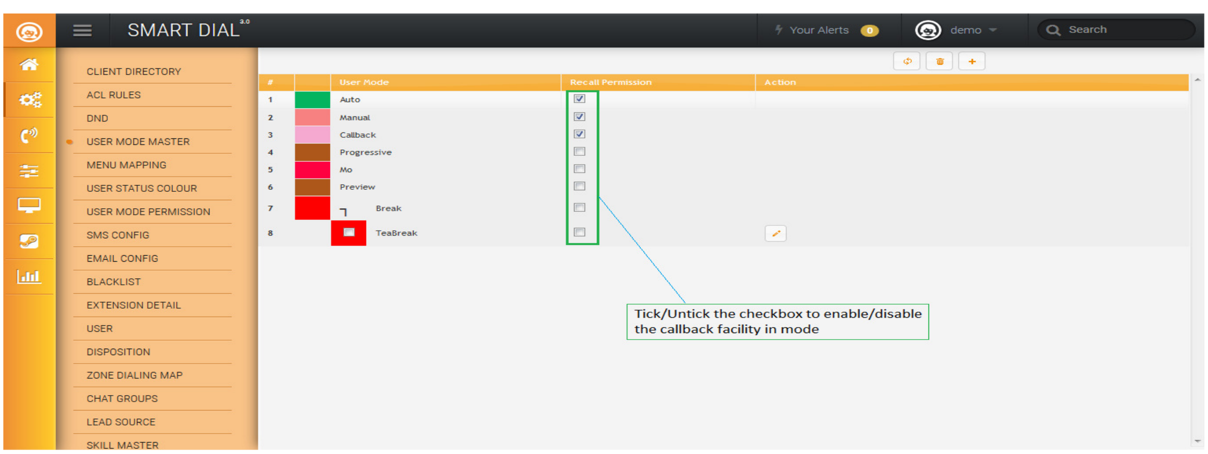
1. **To enable/disable callback facility in a mode**, describes as :-

Step1: Go to system configuration, Hit "User Mode Master" sub menu.

Step2: Now the User Mode Master page appears as follows:



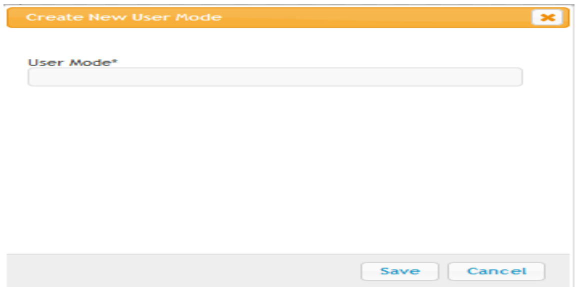
Step2: Once Recall permission is ticked then, it will enable initiate callbacks via agents in that mode.



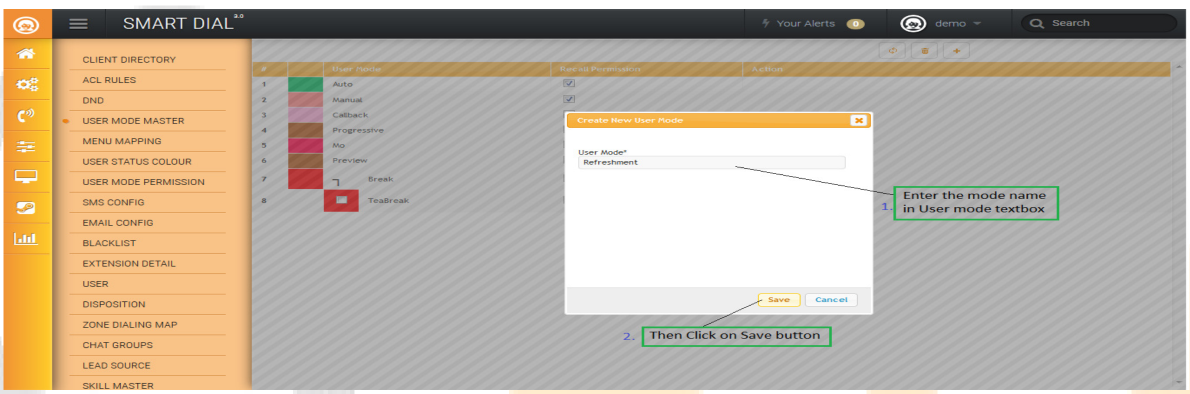
2. Create additional modes :

Step1: Go to system configuration, Hit “User Mode Master” sub menu.

Step2: Now the User Mode Master page appears, hit ‘+’ button to enable appearance of mode creation dialog box.

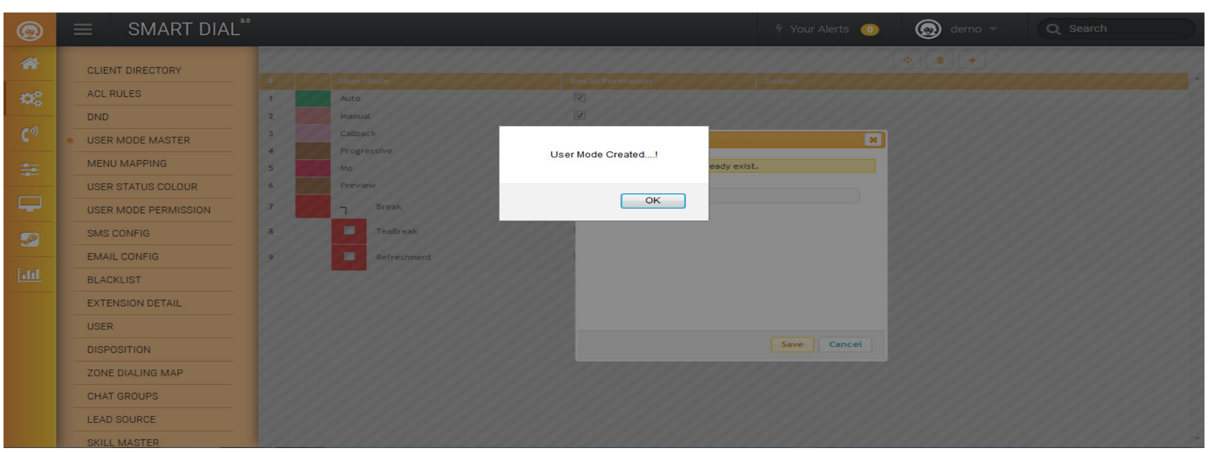


Step3: Now in the mode creation dialog box, give it any alphabetical (only eligible pattern) term.

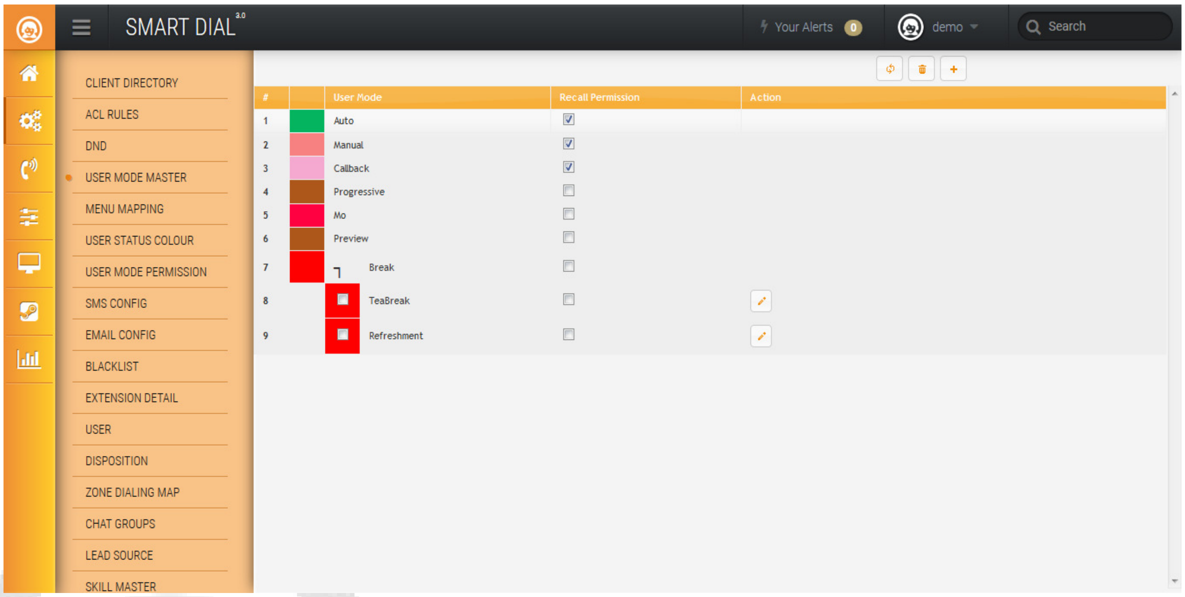


Step4: Then click on Save button

Step5: After click on “Save” button, a popup window gives the message that “User Mode Created....!”



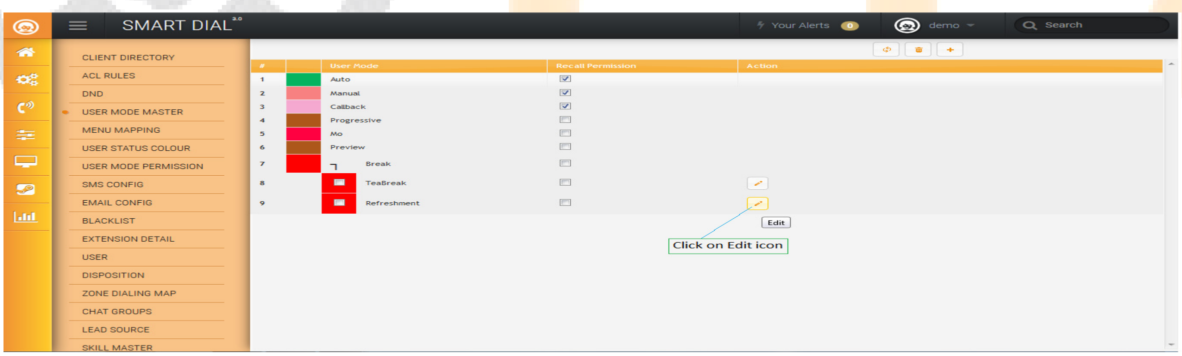
Step6: Now click on “Ok” button, once ok button is clicked, then created mode shows on User Mode Master page as follows:



3. To edit a User Mode follow the steps :-

Step1: Go to system configuration, Hit User Mode Master sub menu

Step2: Now the User Mode master page appears => Click on the edit button near any of created modes, to enable appearance of dialog box.



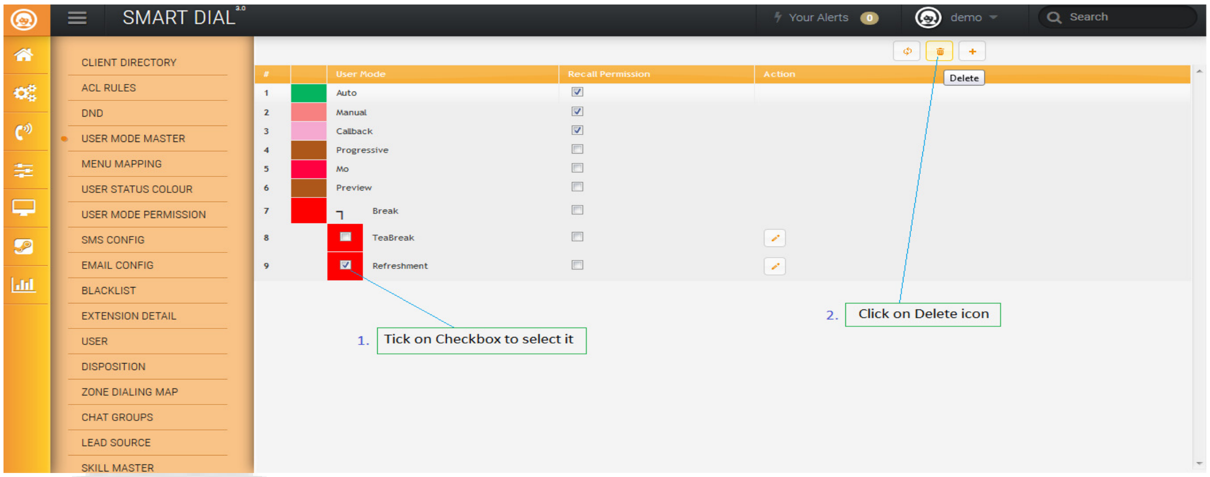
Step3: Change the Refreshment into Lunch_Break, and then click on update button.

Step4: Now we can see the mode has changed.

4. Deleting a created mode from User Mode Master Page:

Step1: Go to system configuration, Hit User Mode Master sub menu

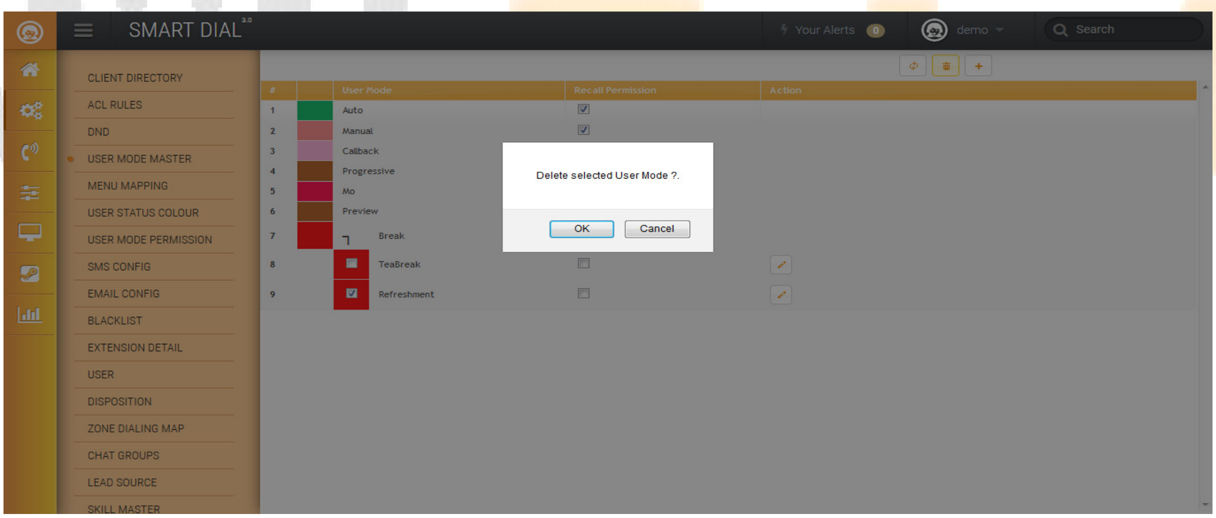
Step2: Now the User Mode master page appears as follows:



Step3: Now choose to tick a checkbox near created user mode.

Step4: Then click on Delete button

Step5: After clicking the delete button, a popup message asking a confirmation for delete



Step6: Now click on the “Ok” button, which will result removal of that data.

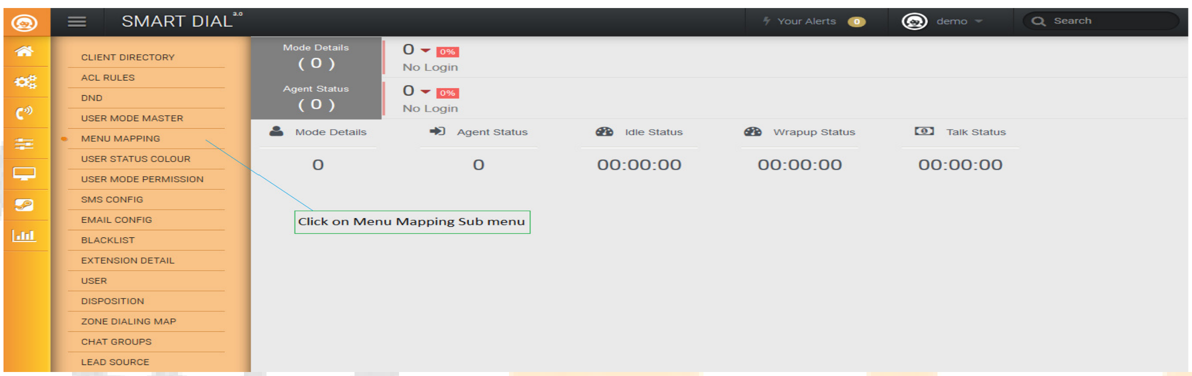
2.1.a.7 Menu Mapping:

Mapping - The term 'mapping' is referred as mechanism of enabling/disabling a module or sub module for a particular user.

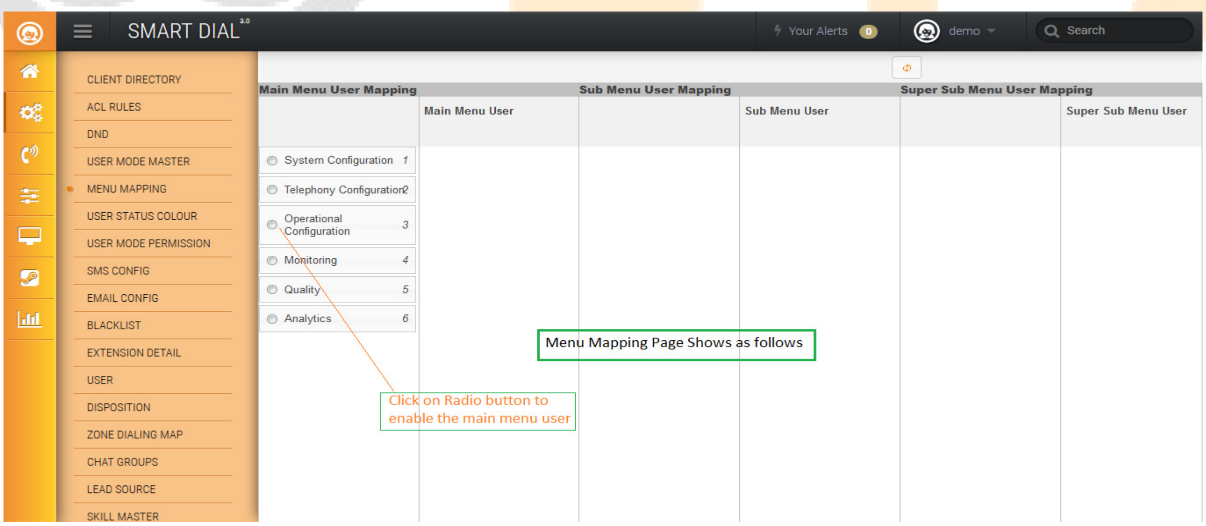
In the context of mapping, admin can easily map menu, sub menu and sub-sub menu to any other user except himself/herself

Mapping an user step demonstrates as below :-

Step1: Go to system configuration, hit menu mapping sub menu to enable menu mapping page to appear with immediate effect.

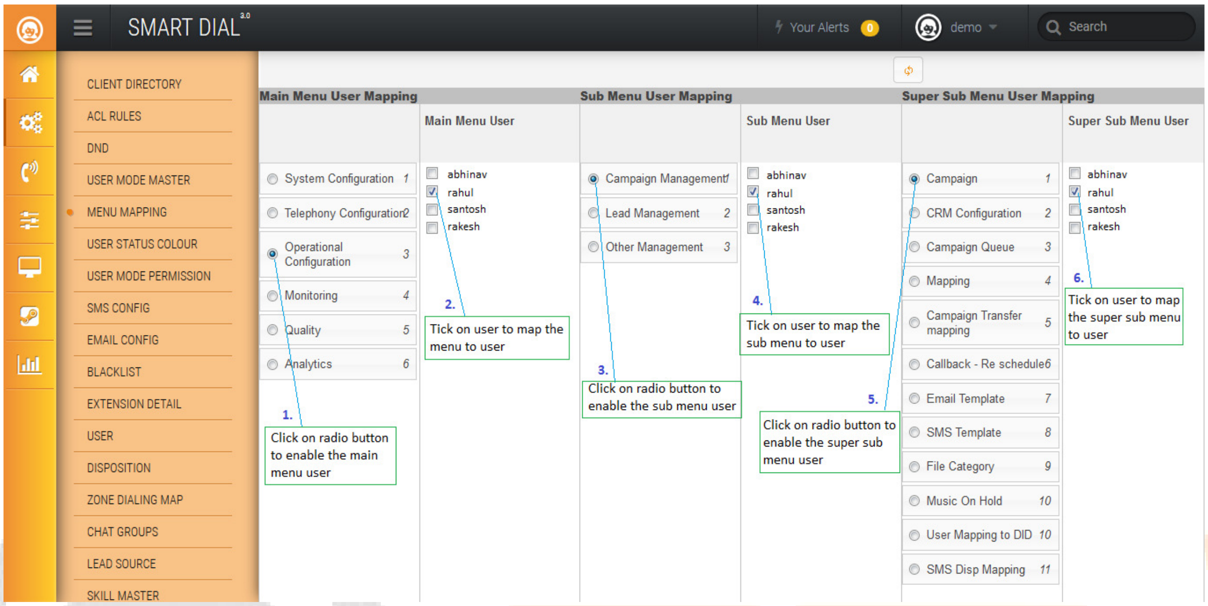


Step2: Click on Operational Configuration radio button in main menu User mapping



Step3: While Operational Configuration is selected, move over the mouse to one of the unticked user in main menu user column and click it

Step4: Then do the steps as demonstrated in below picture

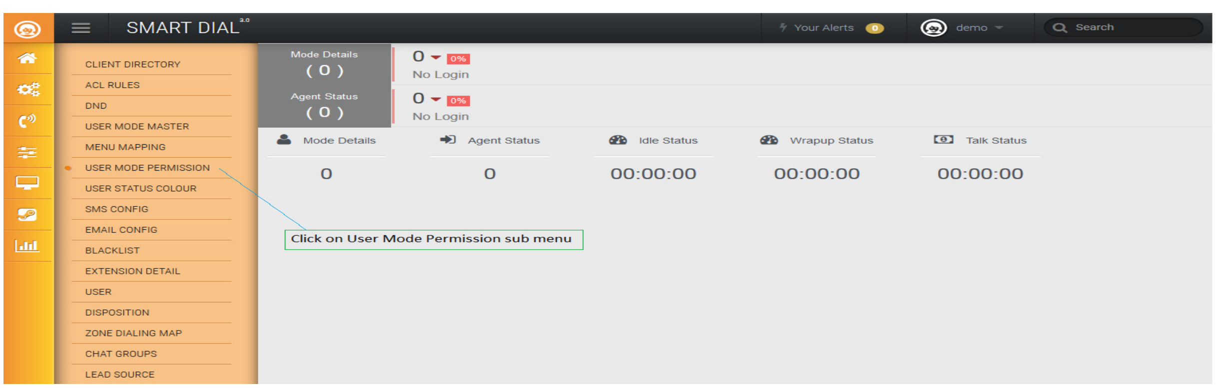


Step5: After that login in client panel with that user and check the menu/sub menu/super sub menu mapped or not.

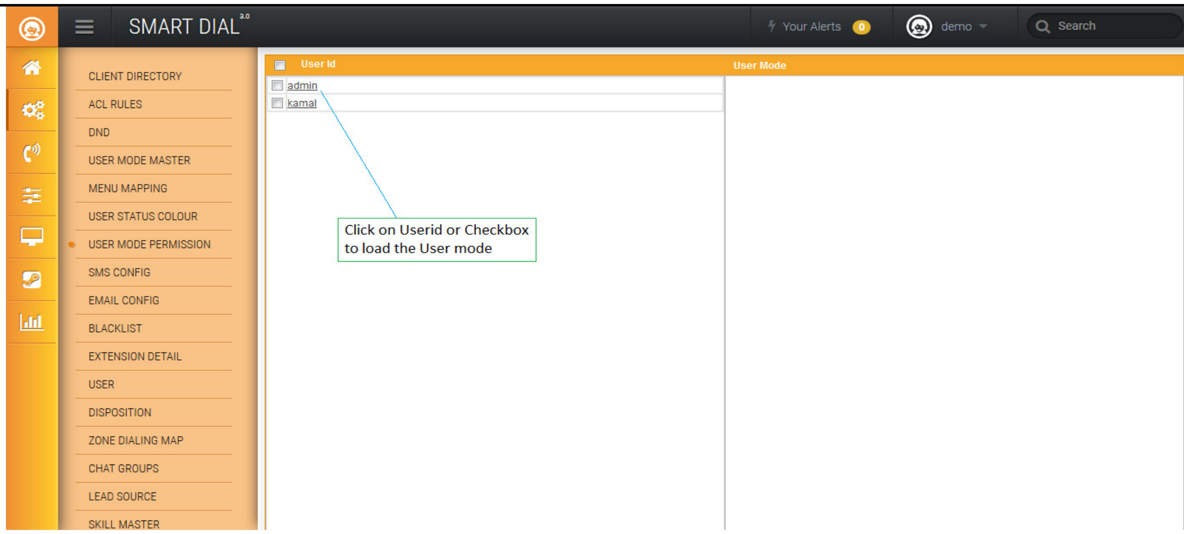
2.1.a.8 User Mode Permission:

This module used to enable/disable extra mode to user.

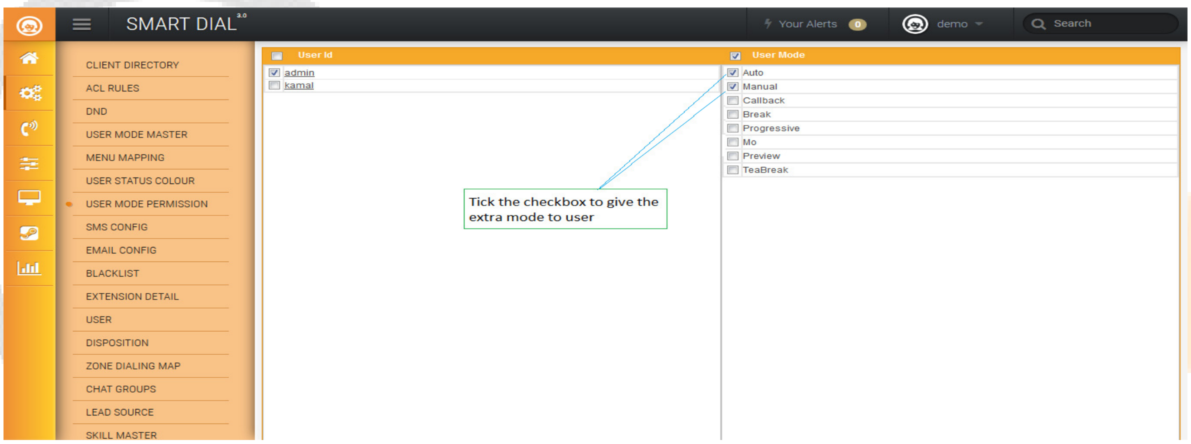
Step1: Go to system configuration, hit "User Mode Permission" sub menu to enable mapping page for the user to mode.



Step2: Now User Mode Permission page open as follows:



Step3: Click on Userid or checkbox to load the User Mode



Step4: Then tick the checkbox to give the extra mode to user as shown in above picture

Step5: When user login in agent application or web panel then extra mode shown in the dialing mode selection

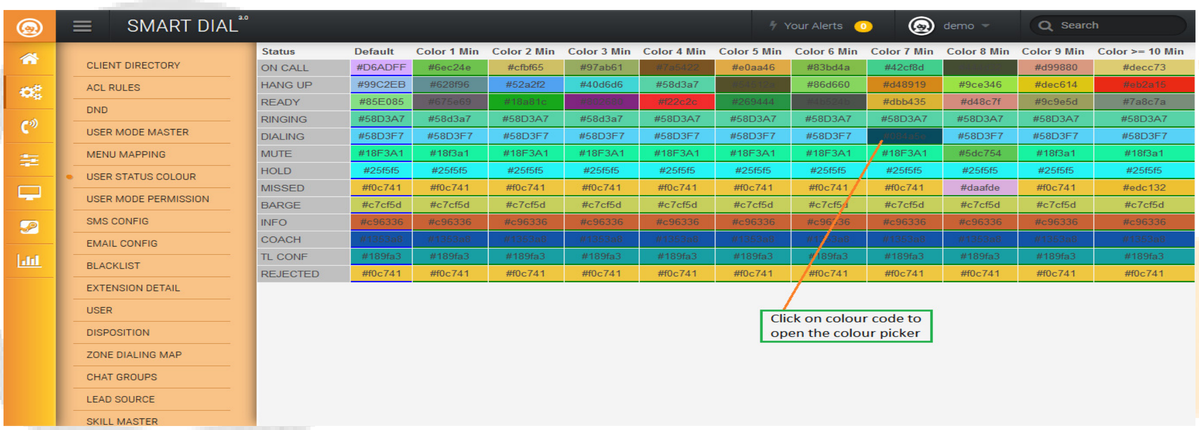
2.1.a.9 User Status Colour:

This module used to change the colour of agent status for Live panel.

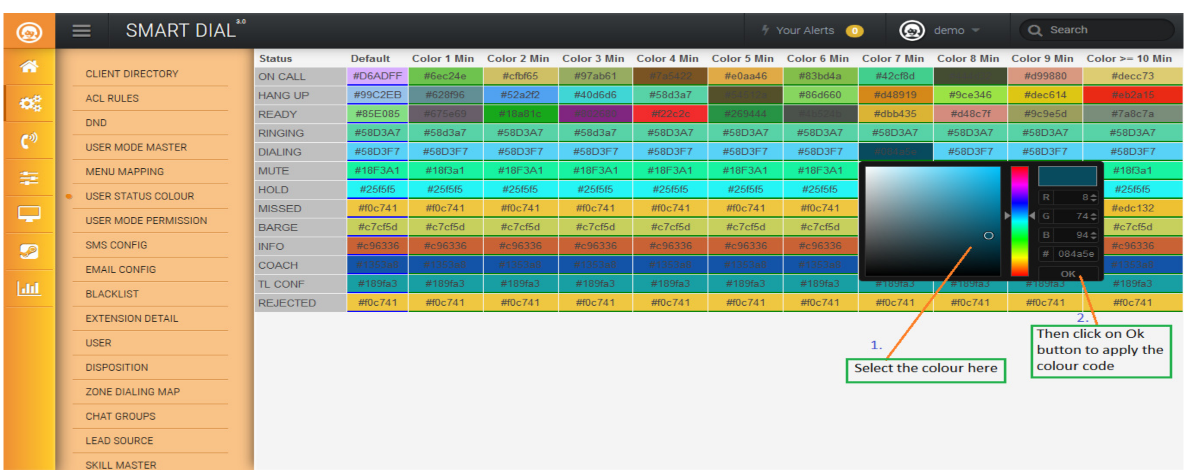
Step1: Go to system configuration, then hit “User Status Colour” sub menu.

Step2: Now the User Status Colour page shown as follows:

Step3: Now in this module, left click any colour code it appears as below



Step4: Select the colour from colour picker and click on Ok button as shown in below picture



Step5: Now login to an agent by entering valid credentials

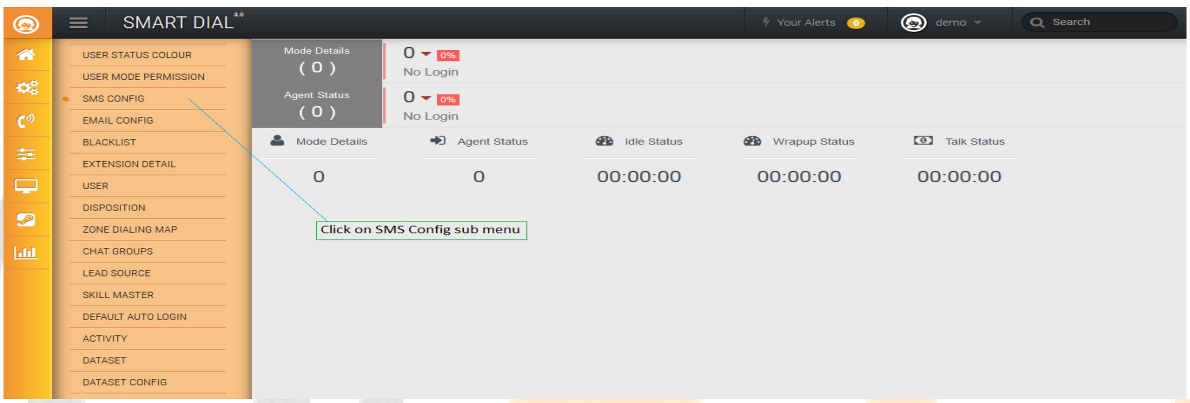
Step6: The effects can be visualized by going to user status on monitoring screen\

2.1.a.10 SMS Config:

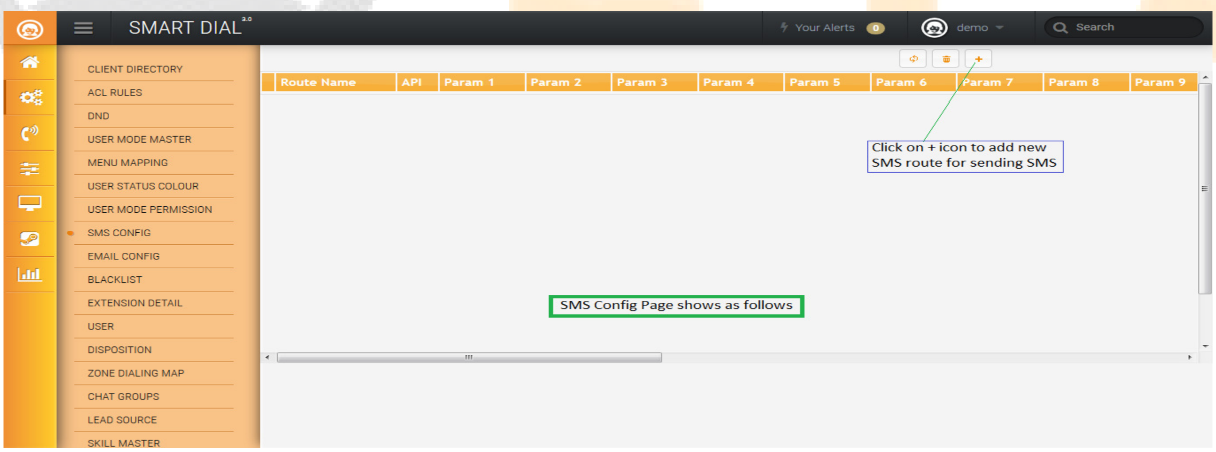
This module facilitates configuration of SMS to send outbound messages to customers.

1. **Add New SMS Route**

Step1: Go to system configuration menu, hit "SMS Config" sub menu to open the SMS Config page.

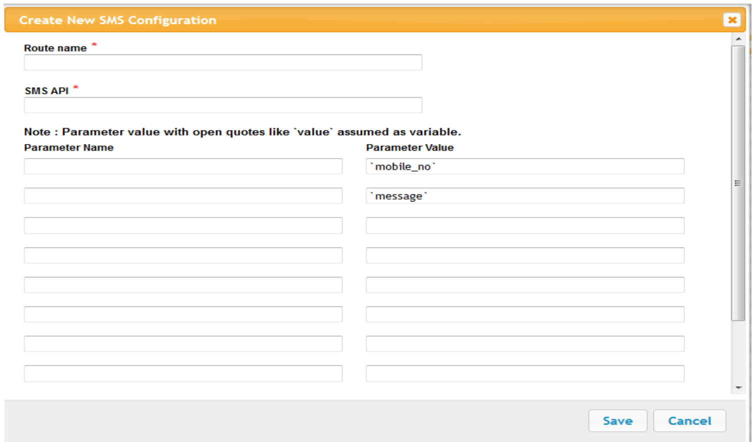


Step2: Now the SMS Config page appears as follows:

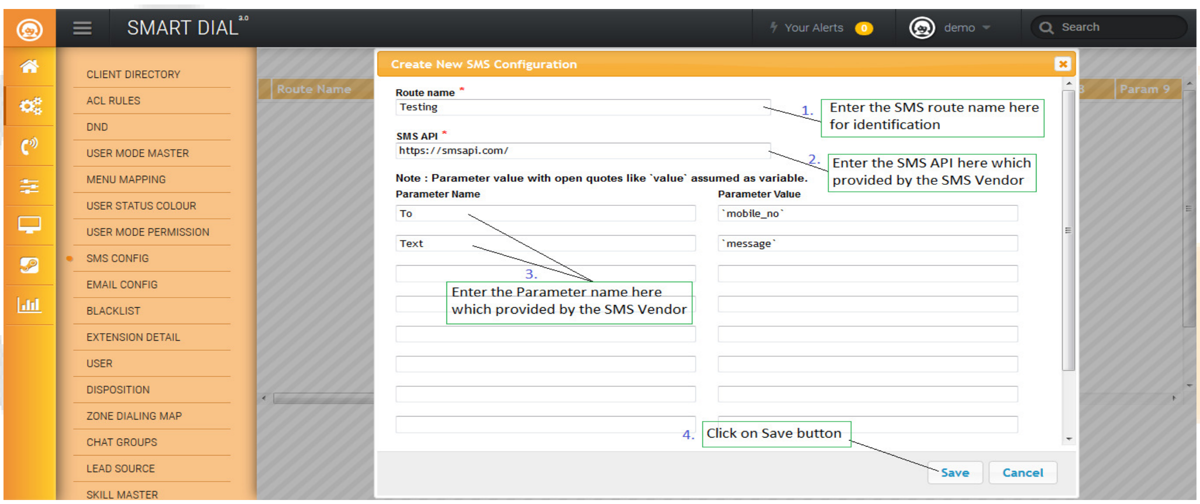


Step3: Click on + icon to add new SMS route for sending SMS

Step4: After click on '+' button to enable appearance of SMS Configuration creation dialog box, which shows as follows:



Step5: Create the new SMS configuration as shown in below picture:



Step6: Enter the SMS configuration as follows:

<u>For example</u>

(i) Route name* - Enter route name for example 'Testing'

(ii) SMS API – for example "http://smsapi.com/" (provided by SMS vendor)

(iii) Parameter Name 1 – To (for Mobile number, provided by SMS vendor)

(iv) Parameter Value 1 – `mobile_no` (fixed value in configuration for mobile number)

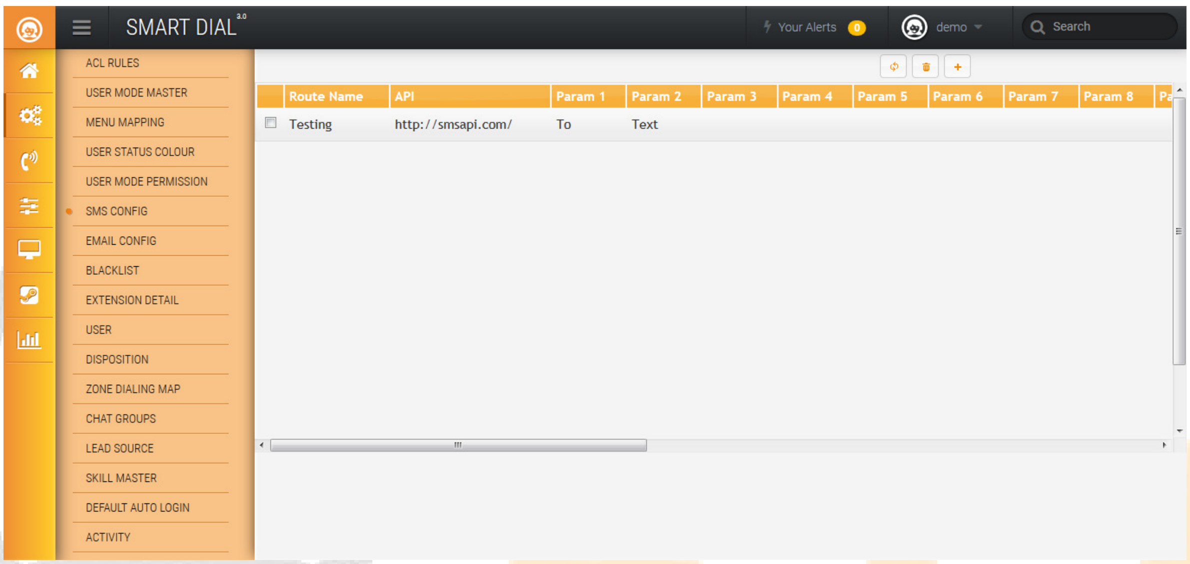
(v) Parameter Name 2 - Text (For message, provided by SMS vendor)

(vi) Parameter Value 2 - `message` (fixed value in configuration for text message)

Step7: Then click on Save button to update the configuration

Step8: After clicking on Save button, a popup window gives the message that “SMS Configuration Create Successfully!...’

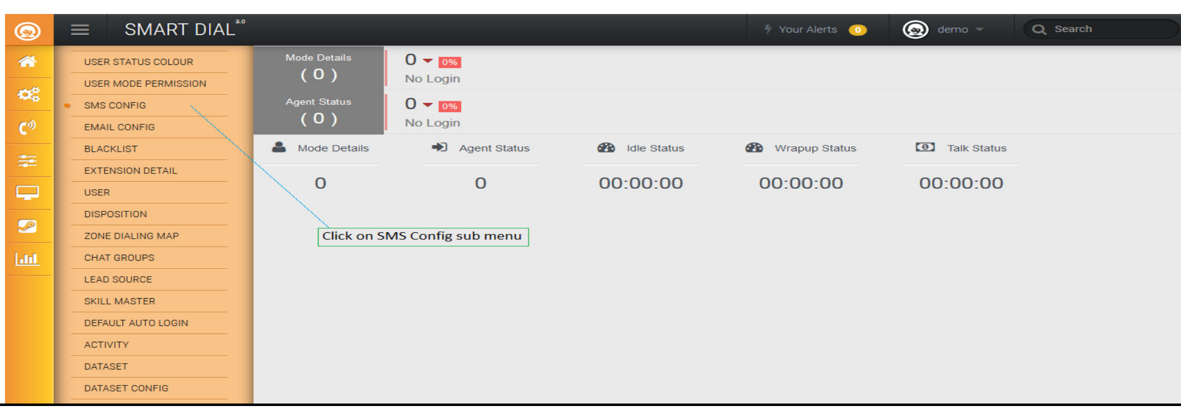
Step9: At last click on Ok button to view the home page for SMS configuration.



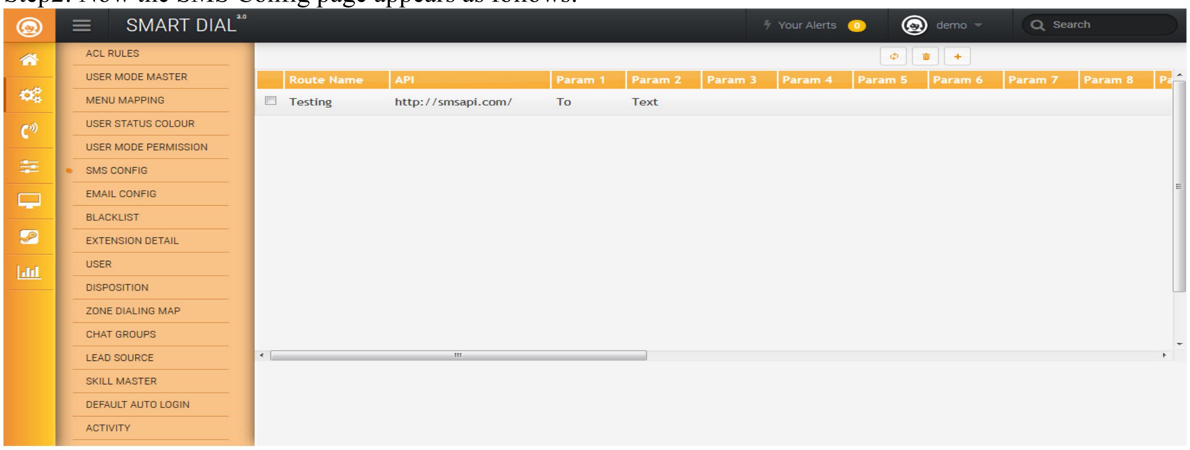
Note: SMS Route which created through SMS Config used in SMS Template/DID SMS Map/SMS Disp Mapping

2. Edit SMS Route

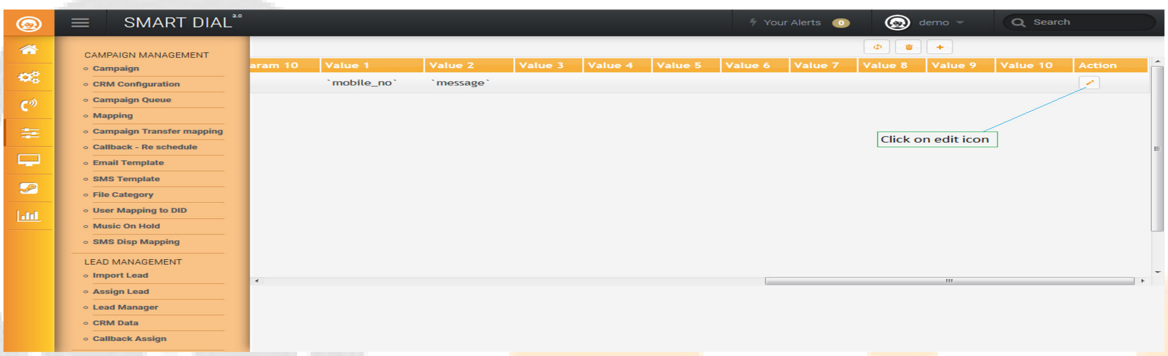
Step1: Go to system configuration menu, hit “SMS Config” sub menu to open the SMS Config page.



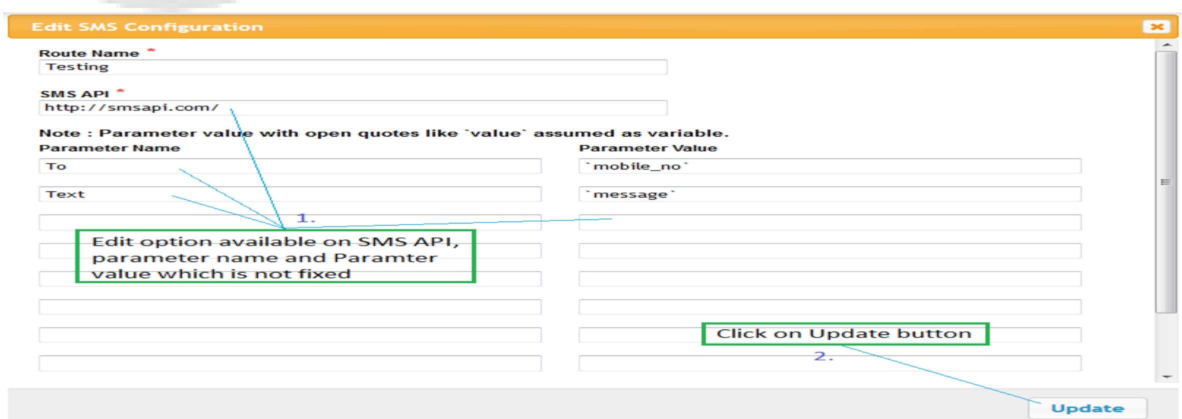
Step2: Now the SMS Config page appears as follows:



Step3: Then Click on the pencil like icon to open editing dialog box.



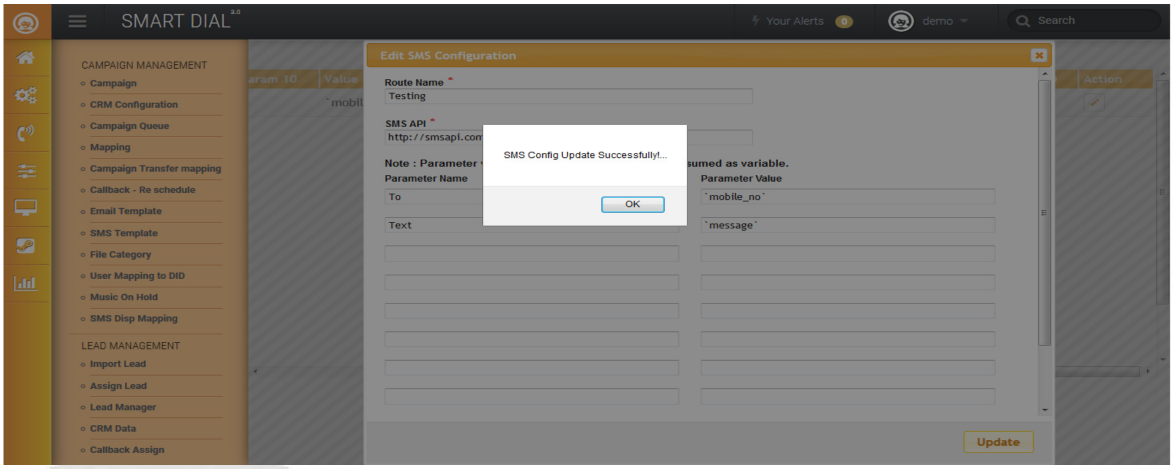
Step4: After clicking on that icon, it will open up a dialog box that enables editing of data.



Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not fixed.

Step6: Once done with renaming, click on the update button to save the renamed data.

Step7: Once update button is clicked, similar pop-up dialog box will occur below.



Step8: Now press the ok button, which will result data changes have been successful.

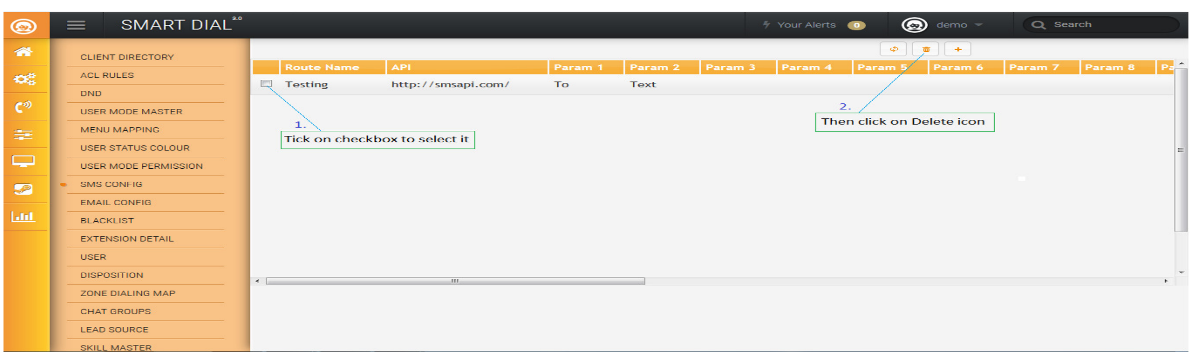
3. Delete SMS Route

This mechanism enables deleting a saved SMS Route.

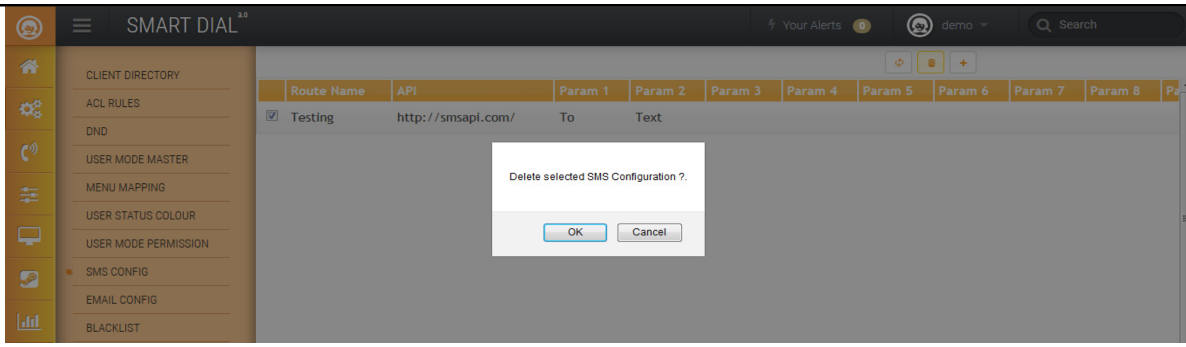
Steps to delete SMS Route are as follows :-

Step1: Go to system configuration, Hit SMS Config sub menu

Step2: Now the SMS Config page appears as below



Step3: First tick on checkbox to select the SMS route then click on Delete icon, a popup window will ask a confirmation message for delete.



Step4: Now click on "Ok" button, once ok button is clicked, then that SMS route deleted with immediate effect.

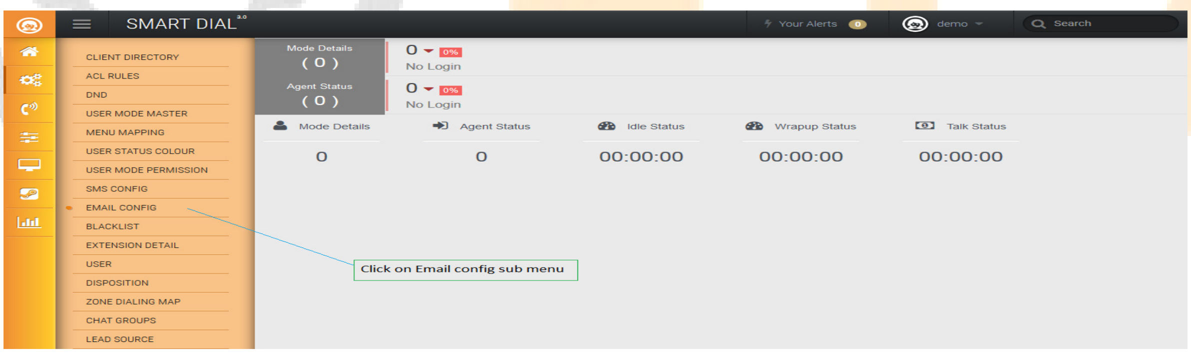
2.1.a.11 Email Config:

This part facilitates configuration of email ID to be employed to send outbound messages to customers.

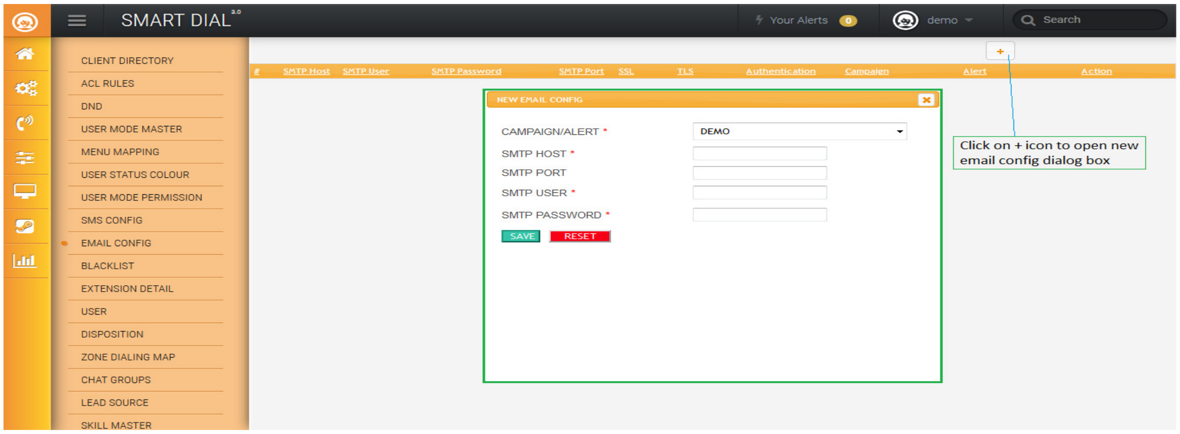
Emil Configuration used to sending outbound message for campaign/service alert (as PRI Alert and Scheduler) messages.

1. **To Add new configuration** follow the s below:

Step1: Go to system configuration menu, hit "Email Config" sub menu to open the Email Config page.

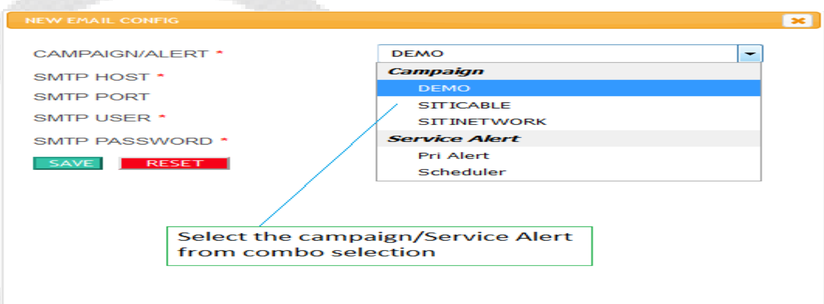


Step2: Now the Email Config page appears as follows:

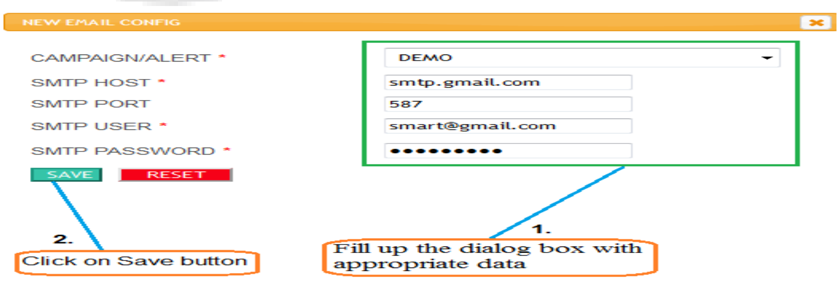


Step3: Then click on + icon to open new email Config dialog box

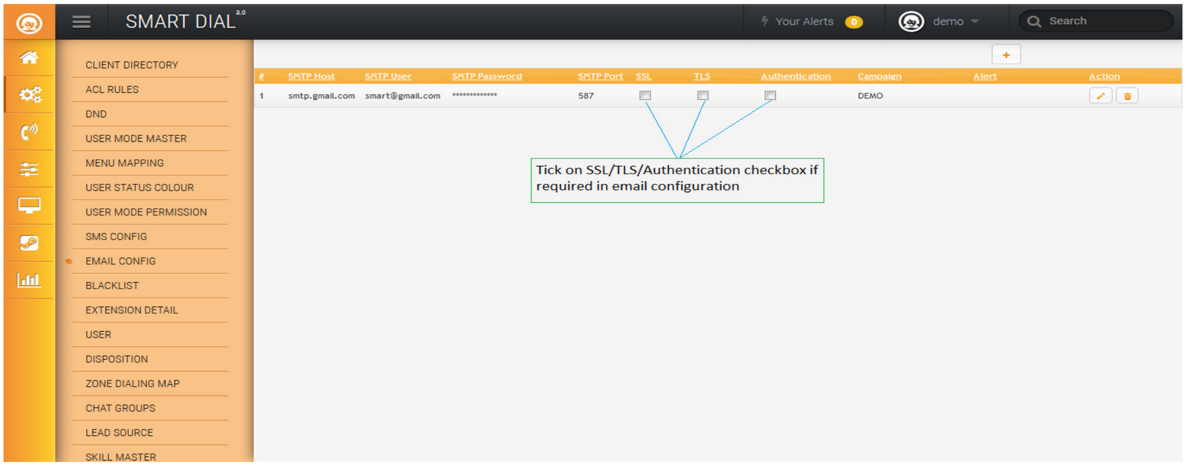
Step4: When dialog box open then select the campaign/service alert from campaign combo box selection as shown in picture



Step5: After that fill up the dialog box with appropriate data of SMTP host, Port, User and Password.



Step6: As we click on Save button, data saved and email Config page shows to the user

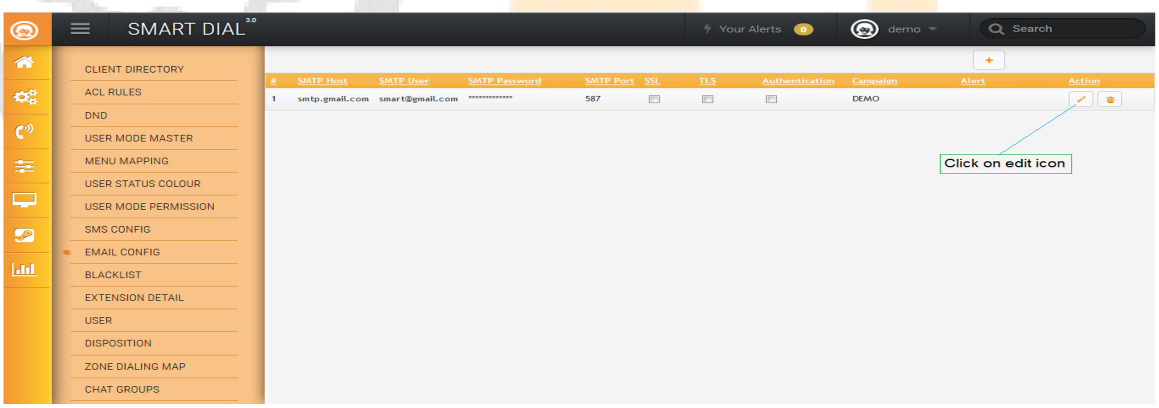


Step7: Then tick on SSL/TLS/Authentication checkbox, if it’s required in email configuration

2. **To Edit email configuration** follow the s below:

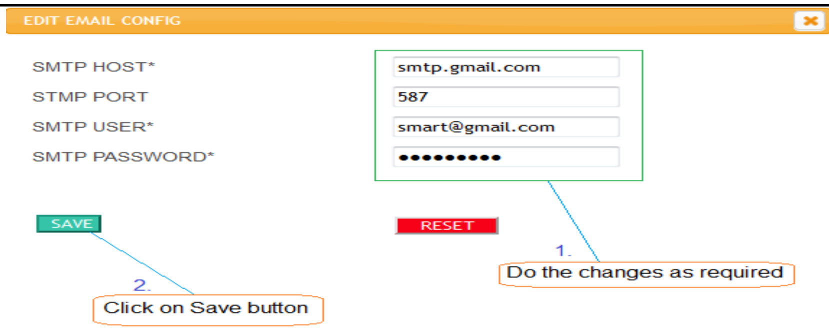
Step1: Go to system configuration menu, hit “Email Config” sub menu to open the Email Config page.

Step2: Now the Email Config page appears are as follows:



Step3: Then Click on the pencil like icon to open editing dialog box.

Step4: After clicking on that icon, it will open up a dialog box that enables editing of data.



Step5: Now in the above dialog box editing option available on SMTP host, Port, User and Password.

Step6: Once done with renaming, click on the Save button to save the renamed data.

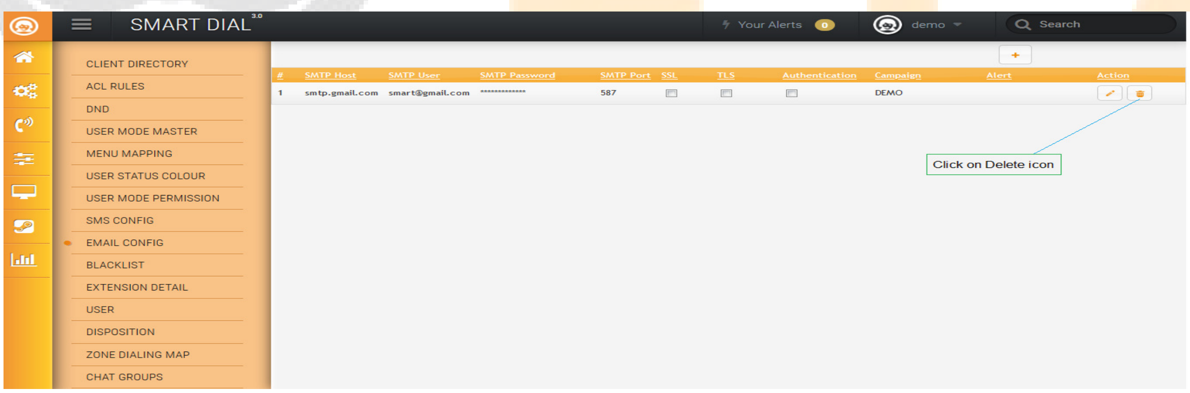
3. Delete Email Configuration

This mechanism enables deleting a saved Email Configuration.

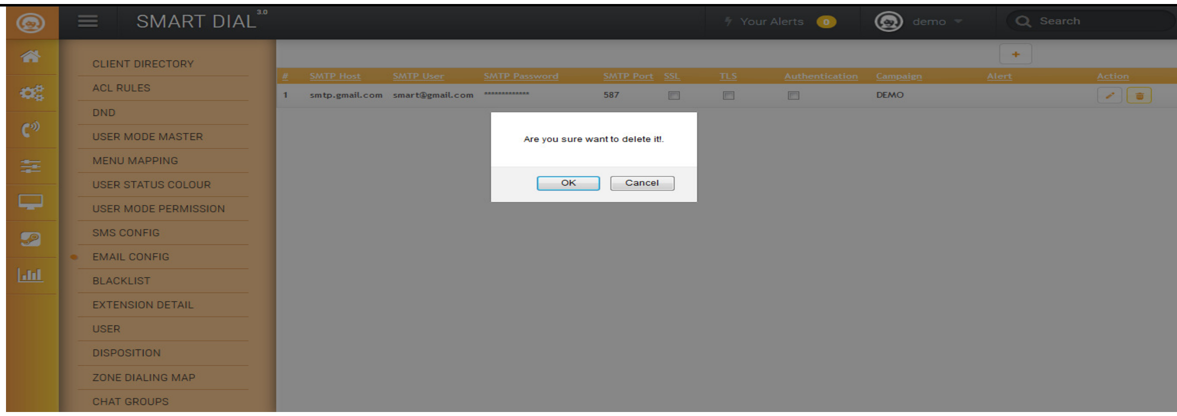
Steps to delete email Configuration are as follows :-

Step1: Go to system configuration, Hit Email Config sub menu

Step2: Now the Email Config page appears are as below



Step3: Click on Delete icon, a popup window will ask a confirmation message for delete.



Step4: Now click on "Ok" button, once ok button is clicked, then that email configuration deleted with immediate effect.

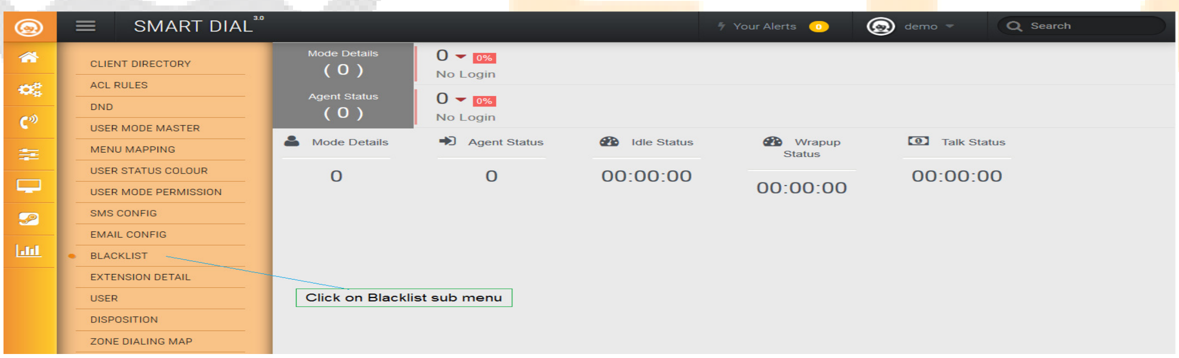
2.1.a.12 Blacklist

This mechanism facilitates blocking of a particular number or a bulk of numbers, so that blacklisted number calls will not come to user.

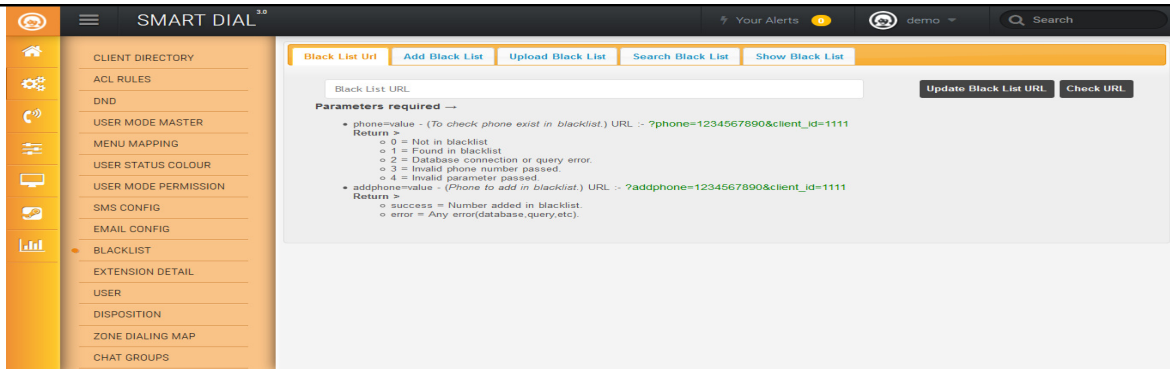
Blacklist mechanism used for the inbound DID.

Scenario - In order for Blacklist to take effect, it is required to enable Blacklist URL.

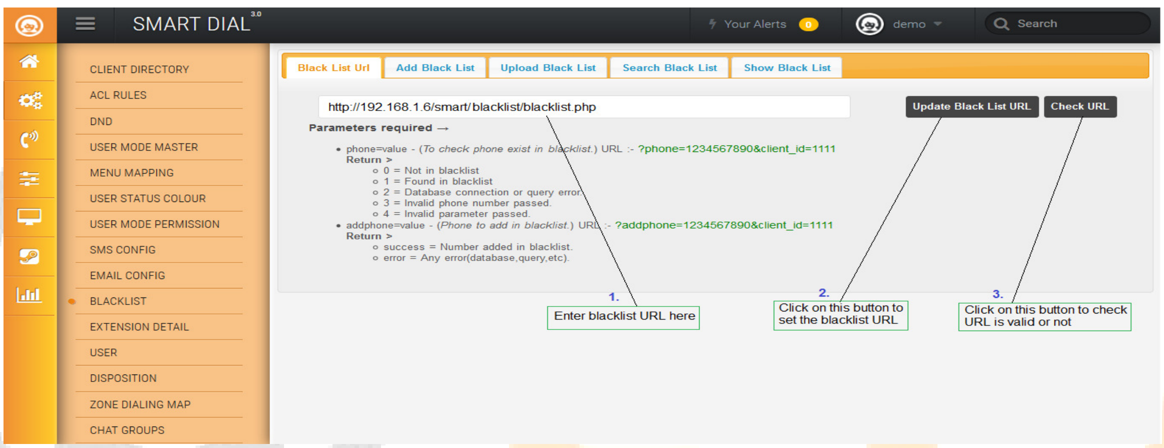
Step1: Left click on the Blacklist option of the menu system configuration.



Step2: After clicking on Blacklist sub menu, the Blacklist page will appear as below:



Step3: Enter blacklist URL, if number required to check in inbound call through the blacklist URL



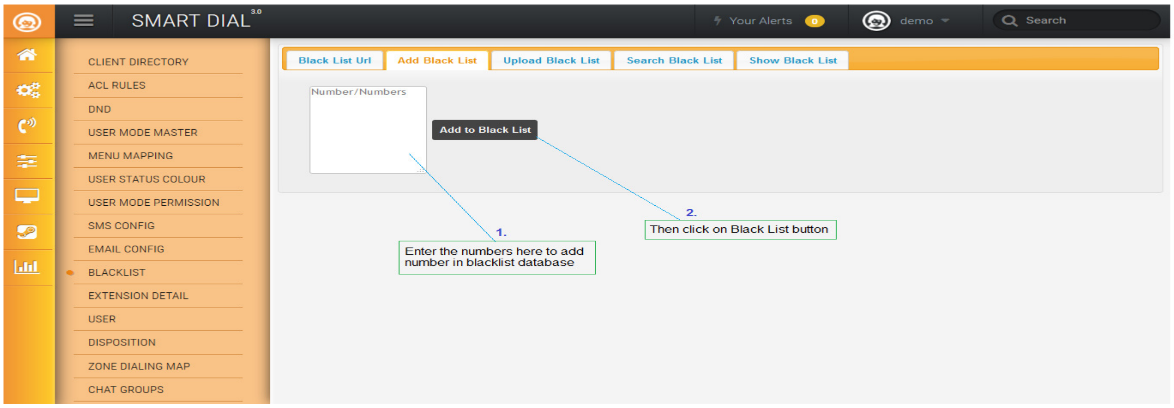
Step4: Then click on "Update Black List URL" for set the Black List URL.

Step5: Click on "Check URL" button to check that URL is valid or not.

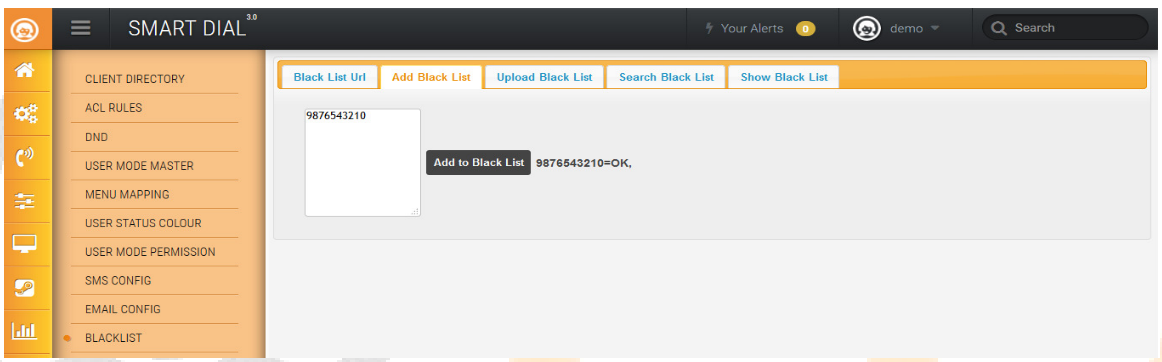
1. **To Add a single number in Blacklist, follow the steps given below:-**

Step1: Go to Blacklist sub menu, of system configuration.

Step2: Then click on "Add Black List" tab, which is after the Black List URL tab



Step3: Now type a number in box and click on “Add to Black List” button.

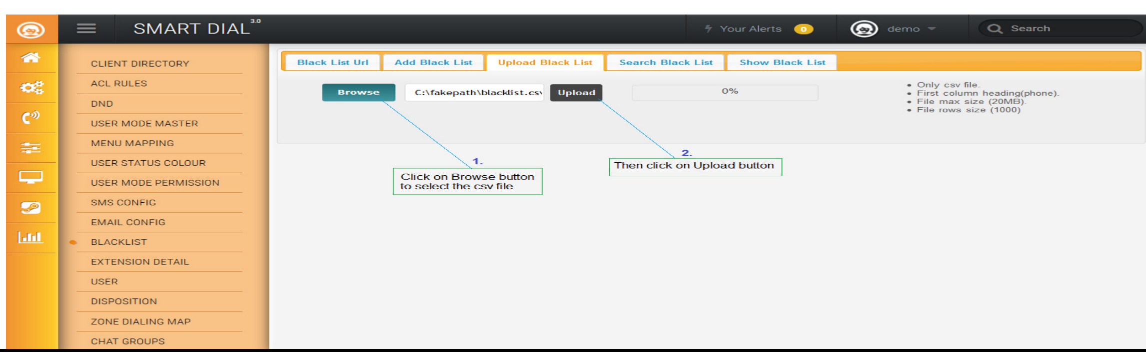


Step4: After clicking on ‘Add to Black List’ button it shows ‘ok’ which indicates the number is added to DND.

2. To add bulk of numbers in Blacklist, follow the steps as below:-

Step1: Go to Black List sub menu, of system configuration.

Step2: Then click on “Upload Black List List” tab, which is after the `Add Black List` tab



Step3: User is supposed to create a csv file via excel sheet in same format mentioned in the dialog box :

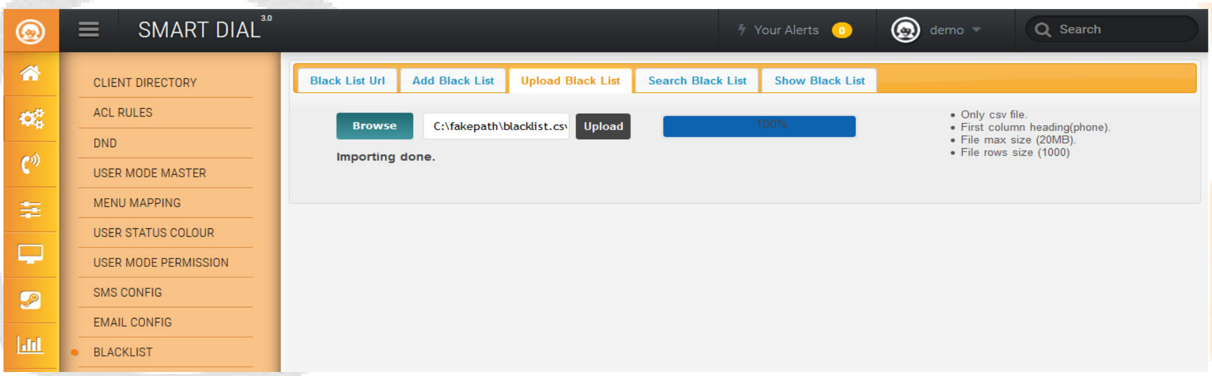
1	phone	
2	7654321900	
3	9889675543	

Step4: Once the csv file have been created, it is to be uploaded in via the dialog box, to do it click on the "Browse" button, which will enable another dialog box to select the csv file

Step5: Once file selected then click on upload button.

Step6: After click on upload button, a popup window will ask a confirmation message.

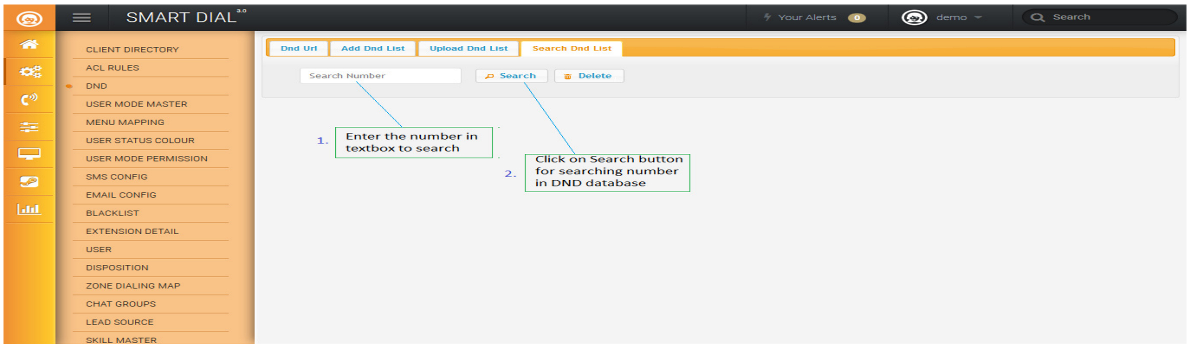
Step7: Now click on "Ok" button, once ok button is clicked, those numbers will be uploaded with immediate effect.



3. To search a number in blacklist database:

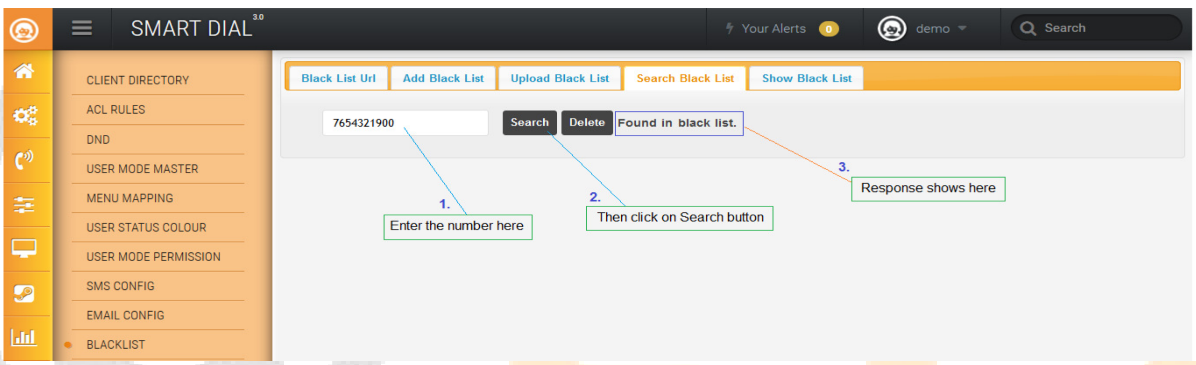
Step1: Go to Blacklist sub menu, of system configuration.

Step2: Then click on "Search Black List" tab, which is after the `Upload Black List` tab



Step3: Enter/type a number in search textbox.

Step4: Click on Search Button.

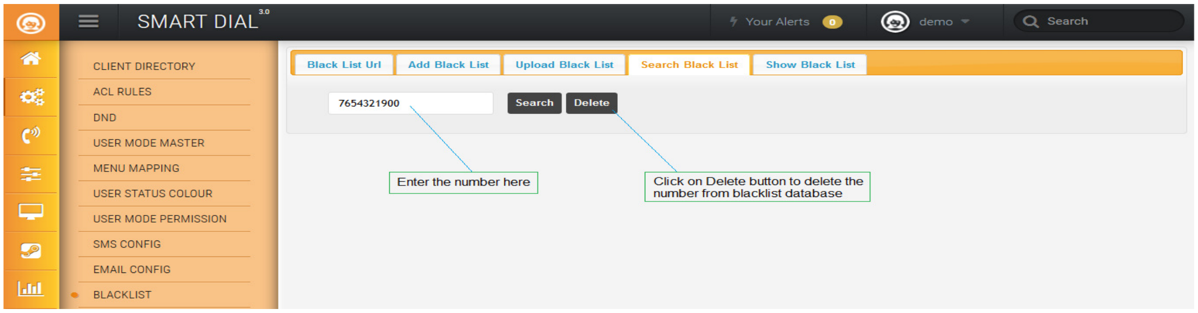


Step5: If number available in blacklist database then message shows as “Found in black list” otherwise message shows that “Not in black list”

4. To delete a number from blacklist database:

Step1: Go to Blacklist sub menu, of system configuration.

Step2: Then click on “Search Black List” tab, which is after the `Upload Black List` tab



Step3: Enter/type a number in search textbox.

Step4: Then click on Delete Button.

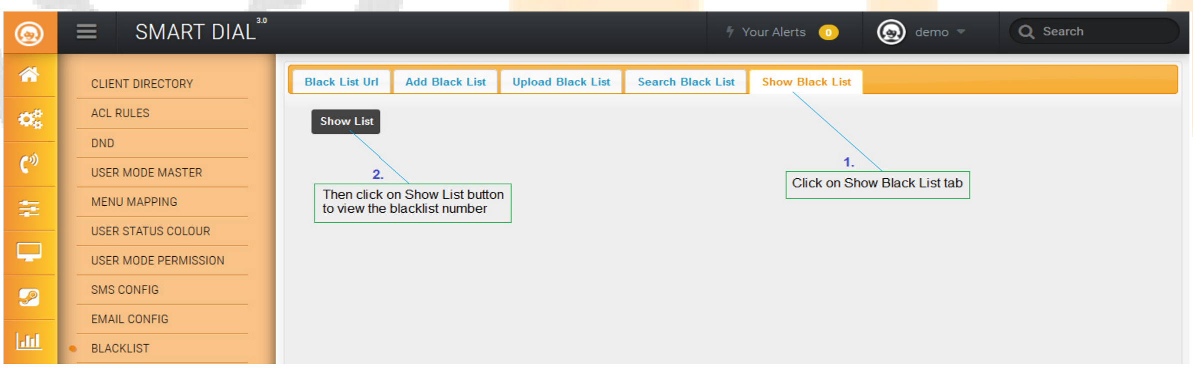
Step5: After click on Delete button, a popup window will ask a confirmation message for delete.

Step6: Now click on "Ok" button, once ok button is clicked, then that number will be deleted with immediate effect.

5. To show the blacklist number:

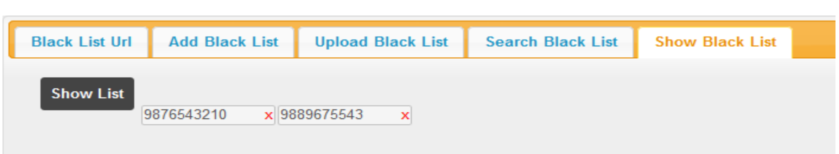
Step1: Go to Blacklist sub menu, of system configuration.

Step2: Then click on "Show Black List" tab, which is after the `Search Black List` tab



Step3: First click on "Show Black List" tab

Step4: After that click on "Show List" button to view the blacklist number on blacklist page as it's shown in picture

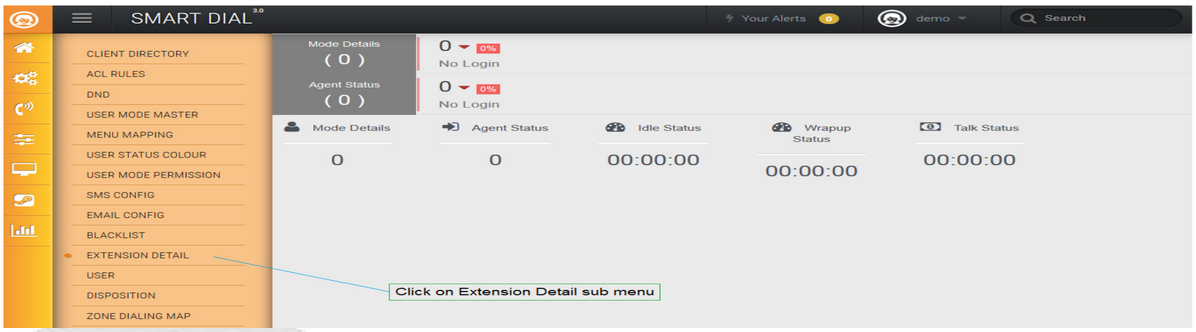


2.1.a.13 Extension Detail:

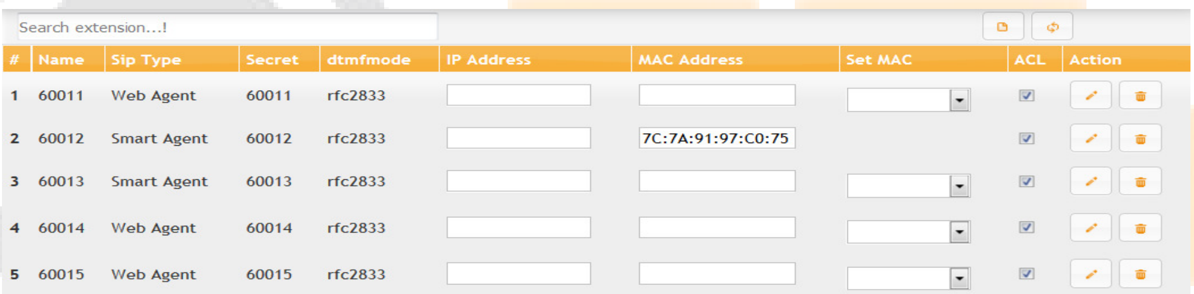
Extension used for agent management like accessing and restricting an agent.

Instructions to use extension detail are as follows :-

Step1: Go to system configuration, left click on extension detail sub menu to enable appearance of extension details page.



Step2: Extension Detail page view the allotted extension/SIP to client.



Search extension...!

#	Name	Sip Type	Secret	dtmfmode	IP Address	MAC Address	Set MAC	ACL	Action
1	60011	Web Agent	60011	rfc2833					
2	60012	Smart Agent	60012	rfc2833		7C:7A:91:97:C0:75			
3	60013	Smart Agent	60013	rfc2833					
4	60014	Web Agent	60014	rfc2833					
5	60015	Web Agent	60015	rfc2833					

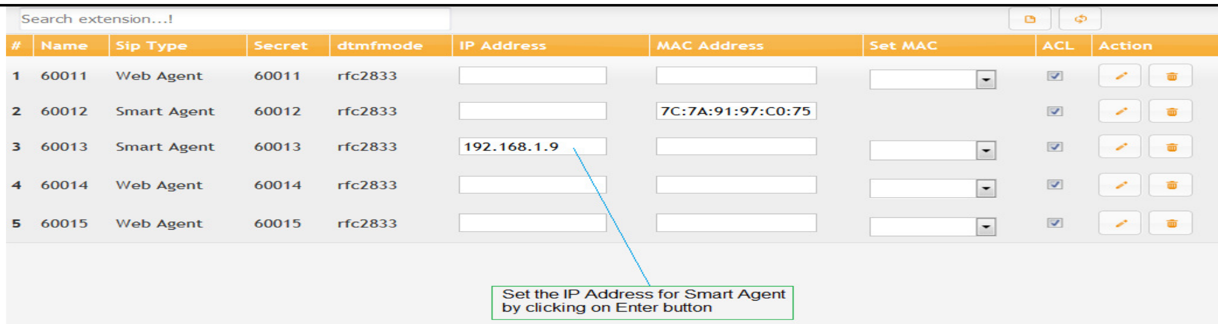
1. **Set the IP Address for Smart Agent**

IP Address used for the Smart Agent SIP type.

When user login through the Smart Agent then agent application check that IP/MAC Address allotted to that PC or not. If not then it's sent the request to server for the login.

Step1: Consider the steps of going to Extension sub menu as mentioned above.

Step2: When extension page appears then click on IP Address textbox



Search extension...!

#	Name	Sip Type	Secret	dtmfmode	IP Address	MAC Address	Set MAC	ACL	Action
1	60011	Web Agent	60011	rfc2833					
2	60012	Smart Agent	60012	rfc2833		7C:7A:91:97:C0:75			
3	60013	Smart Agent	60013	rfc2833	192.168.1.9				
4	60014	Web Agent	60014	rfc2833					
5	60015	Web Agent	60015	rfc2833					

Step3: Set the IP Address for Smart Agent by clicking on Enter button

Step4: After clicking on enter button, popup message shows as "Updated successfully"

Step5: Then click on Ok button to save the changes.

2. Set the MAC Address for Smart Agent

MAC Address used for the Smart Agent SIP type.

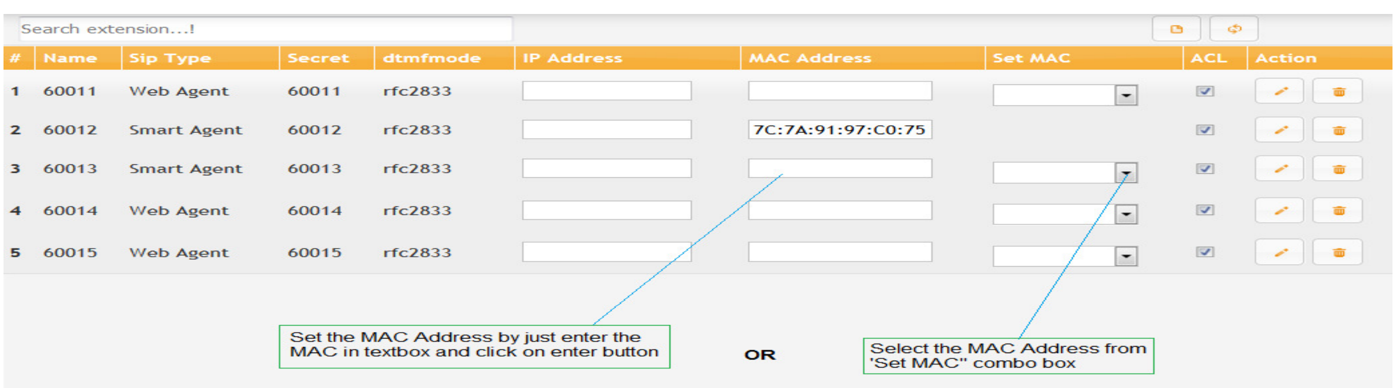
When user login through the Smart Agent then agent application check that IP/MAC Address allotted to that PC or not. If not then it's sent the request (MAC Address) to server for the login.

Step1: Consider the steps of going to Extension sub menu as mentioned above.

Step2: When Extension page view to user then select the MAC Address from Set MAC combo box

Or

Step2: Enter the MAC Address in MAC Address textbox and click on Enter button



Search extension...!

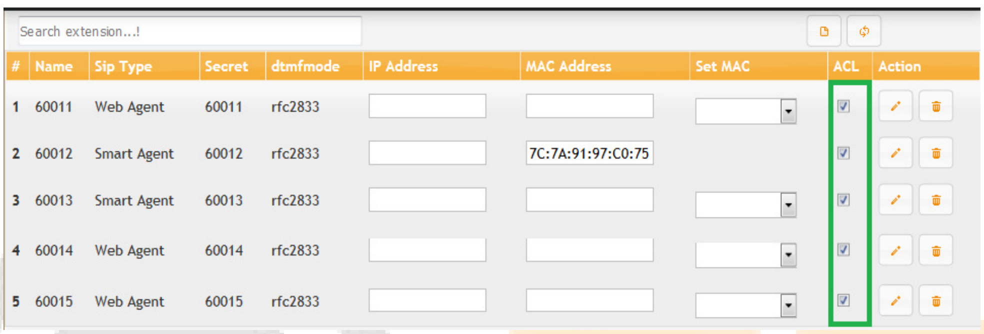
#	Name	Sip Type	Secret	dtmfmode	IP Address	MAC Address	Set MAC	ACL	Action
1	60011	Web Agent	60011	rfc2833					
2	60012	Smart Agent	60012	rfc2833		7C:7A:91:97:C0:75			
3	60013	Smart Agent	60013	rfc2833					
4	60014	Web Agent	60014	rfc2833					
5	60015	Web Agent	60015	rfc2833					

Step3: After clicking on enter button, popup message shows as “Updated successfully”

Step4: Then click on Ok button to save the changes.

3. ACL for the extension

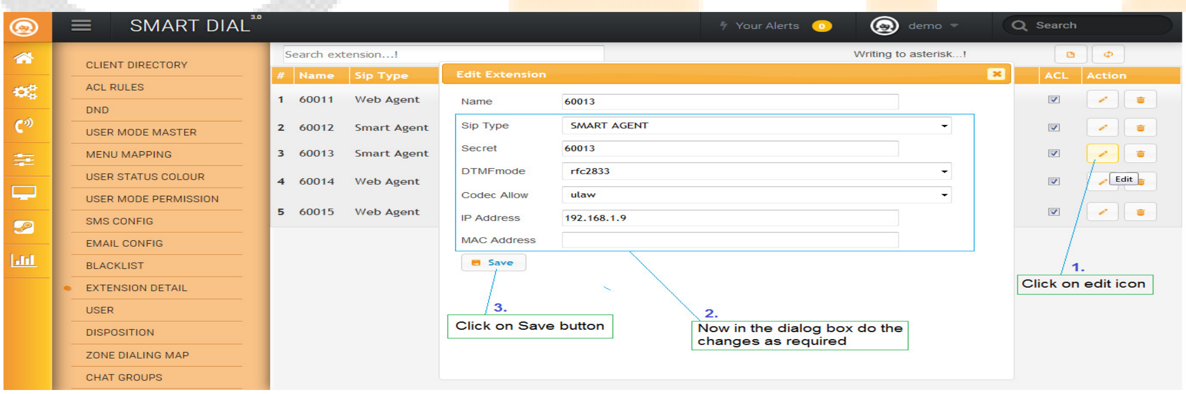
There is a checkbox titled ACL in Extension, if it is ticked then ACL rules will be applicable for that extension/SIP else any it will enable login to agents via any PC of any IP address series.



4. Edit Extension setting

Step1: Consider the steps of going to Extension sub menu as mentioned above.

Step2: When Extension page view to user then click on the pencil like icon associated with one of the records, to enable edit dialog box to appear.



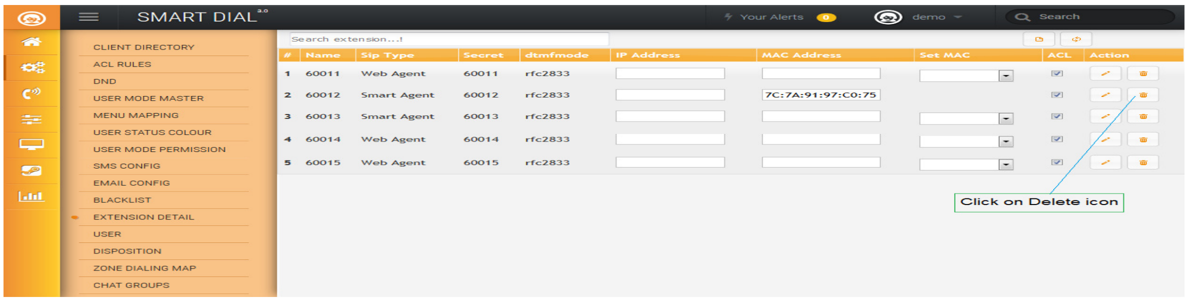
Step3: Now in the dialog box do the changes as required then click on Save button

5. Delete IP/MAC Address data through Delete Action

Delete icon used for deleting IP/MAC Address record.

Step1: Consider the steps of going to Extension sub menu as mentioned above.

Step2: When Extension page views to user then click on the delete icon associated with one of the records.



Step3: After clicking the delete icon, a popup message asking for confirmation of data delete

Step4: Now click on the “Ok” button, which will result removal of IP/MAC Address data.

2.1.a.14 User:

This section enables creation of user and customization (Permission/Restriction) of facilities pertaining to particular user.

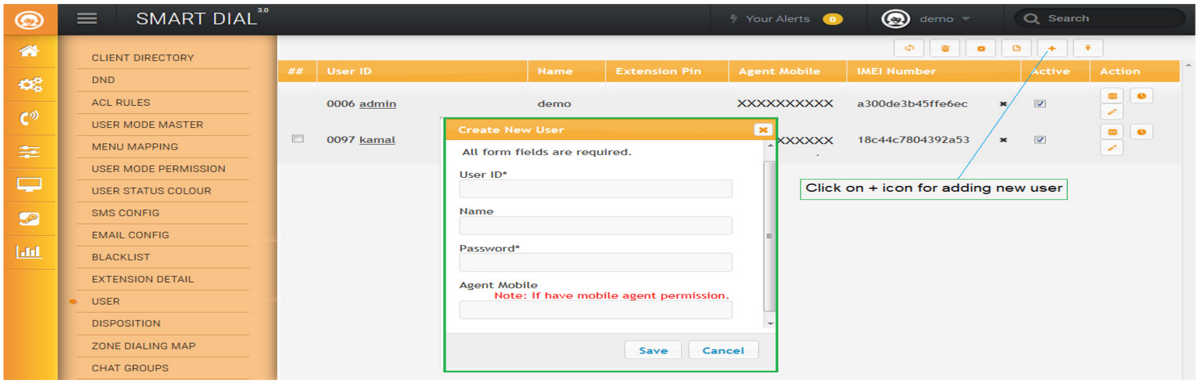
The facilities includes refresh, change properties, add new user, edit user, delete user and add bulk of users.

Instructions follows as :-

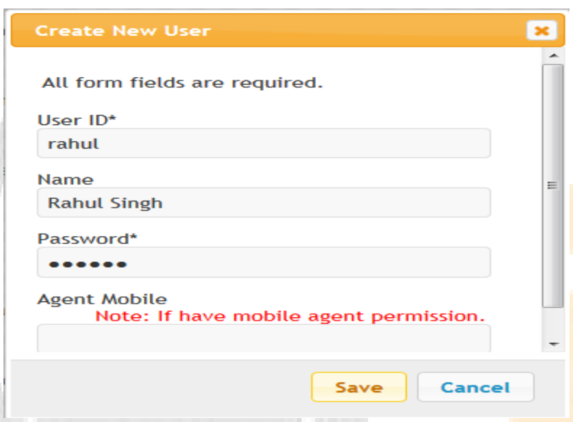
1. Add User

Step1: Go to system configuration menu, Click User sub menu to enable appearance of user page

Step2: Now click on ‘+’ button among the couple of buttons, to let add user dialog box appear

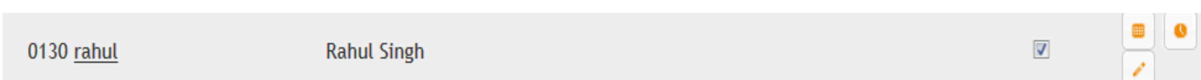


Step3: Now in the above dialog box add details of the mentioned fields.



Step4: After clicking on save button, message shows as "User Save Successfully"

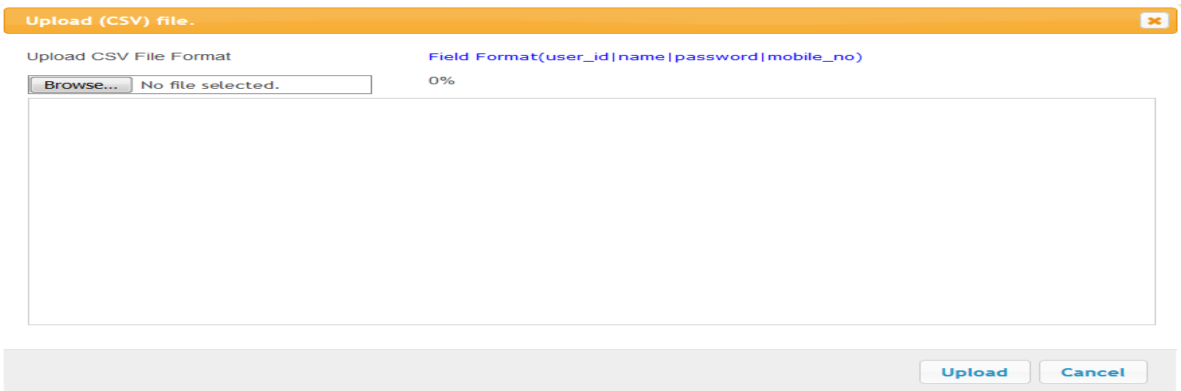
Step5: Now we can see the record added in the system



2. To add bulk of users

Step1: Click on Upload user icon, to let uploading dialog box appear.

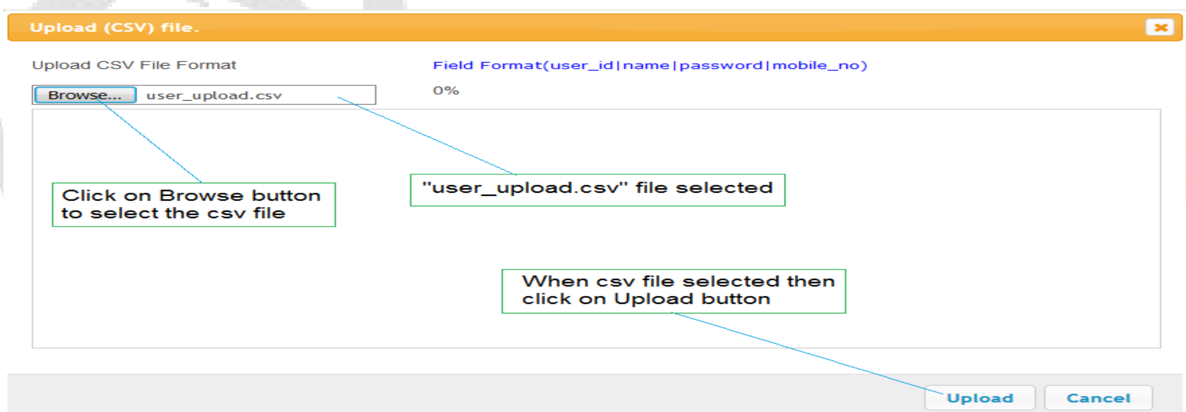
Step2: Once upload button is clicked, a mini dialog box will appear as below



Step3: User is supposed to create a csv file via excel sheet in same format mentioned in the dialog box :

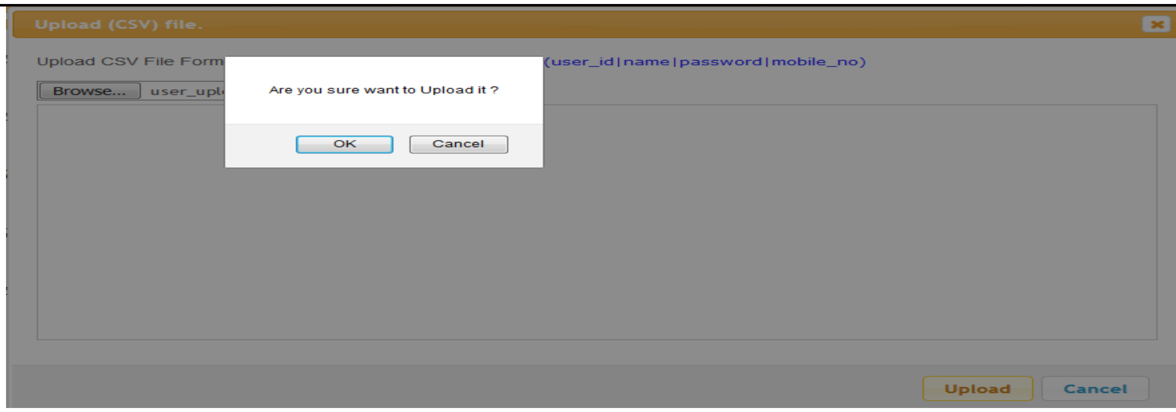
	A	B	C	D
1	user_id	name	password	mobile_no
2	rahul	Rahul Singh	rahul1	
3	sohan	Sohan	sohan1	

Step4: Once the csv file have been created, it is to be uploaded in via the dialog box, to do it click on the “Browse” button, which will enable another dialog box to select the csv file

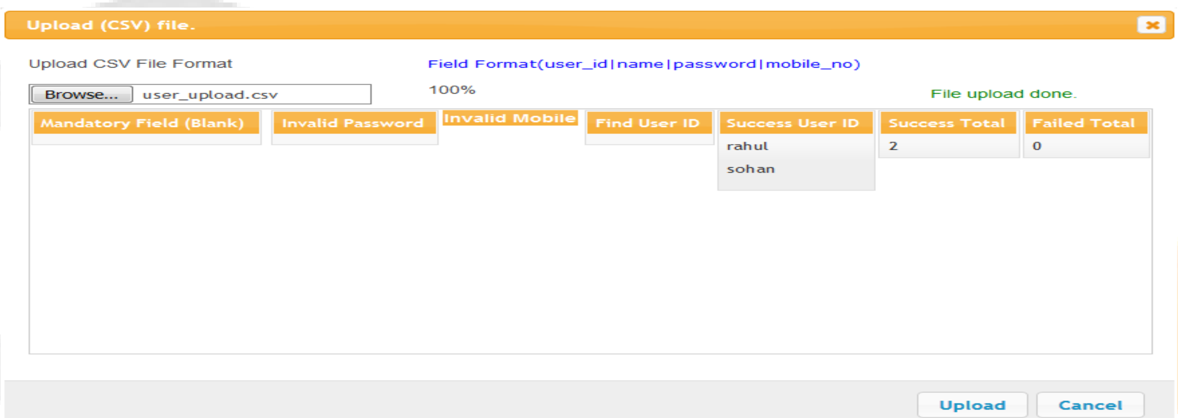


Step5: Once file selected then click on upload button.

Step6: After click on upload button, a popup window will ask a confirmation message.

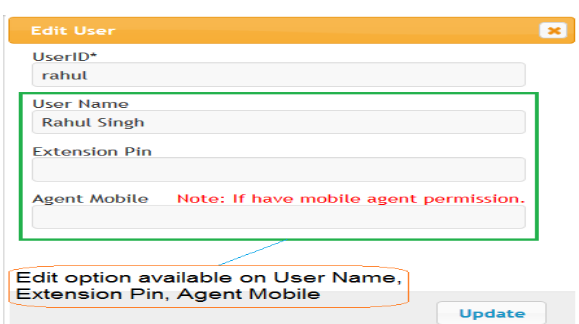


Step8: Now click on “Ok” button, once ok button is clicked, those numbers will be uploaded showing a message in green text “File uploads done”.



3. Edit User

Step1: Click on the pencil like icon to open editing dialog box.



Step2: Now in the above dialog box editing option available on User name, Extension Pin and Agent Mobile.

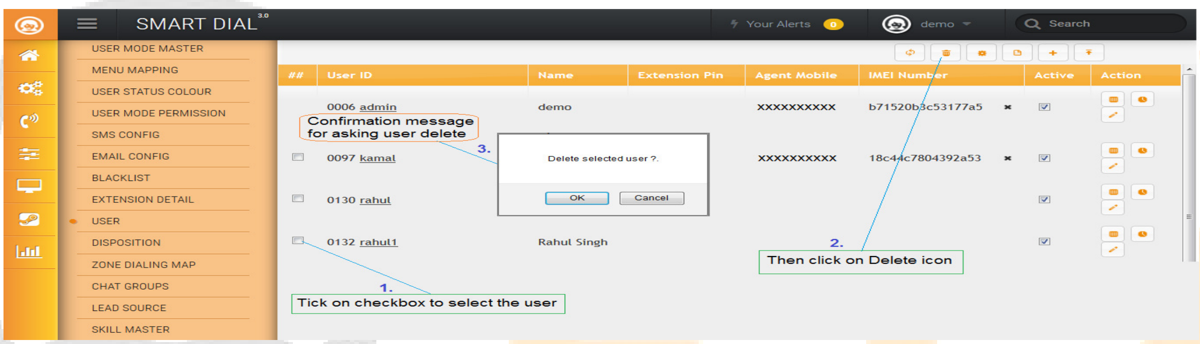
Step3: Once done with renaming, click on the update button to save the renamed data.

Step4: Once update button clicked, then a popup message shows as “User Update Successfully!..”.

Step5: At last click on Ok button to close the open dialog box.

4. Delete User

Step1: Go to system configuration menu, Click User sub menu to enable appearance of user page



Step2: Tick on checkbox to select the user

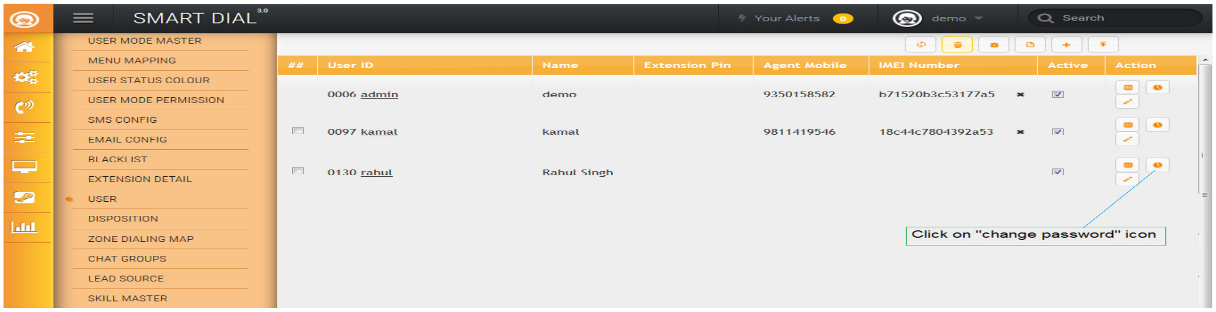
Step3: Then click on Delete icon

Step4: After clicking the delete icon, a popup message asking a confirmation for delete

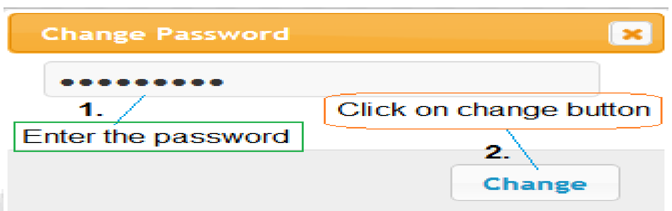
Step5: Now click on the “Ok” button, which will result removal of that data.

5. Change Password

Step1: Go to system configuration menu, Click User sub menu to enable appearance of user page



Step2: Click on “change password” icon to open change password dialog box



Step3: Now in the above dialog box editing option available on Change password textbox.

Step4: Once done with renaming, click on the “Change” button to save the renamed data.

Step5: Once Change button clicked, then a popup message shows as “Change Password Successfully!...”.

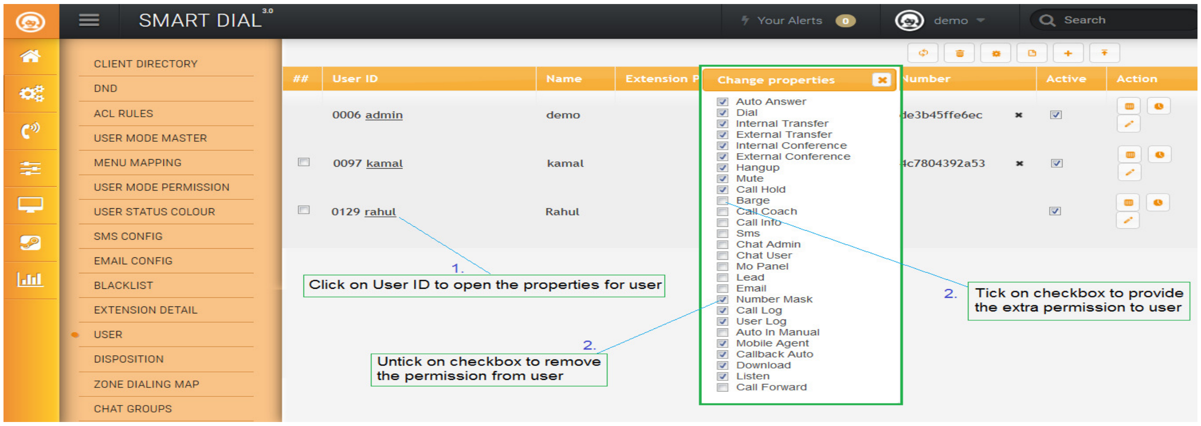
Step6: At last click on Ok button to close the open dialog box.

6. Change Properties of User

This mechanism facilitates to provide/remove permission from User’s.

(i) <u>Change properties for Single User</u>

Step1: Go to system configuration menu, Click User sub menu to enable appearance of user page



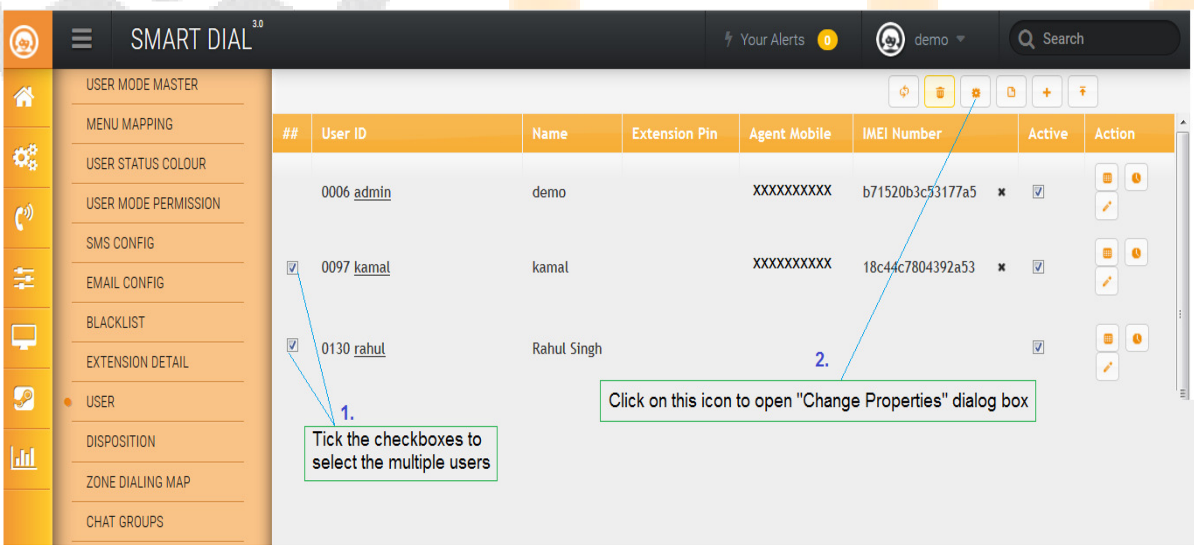
Step2: Then click on User ID to open the "Change Properties" for user as shown in above picture

Step3: When "Change Properties" dialog box open then tick on checkbox to provide the extra permission to user

Step4: Untick on checkbox in change properties to remove the permission from user.

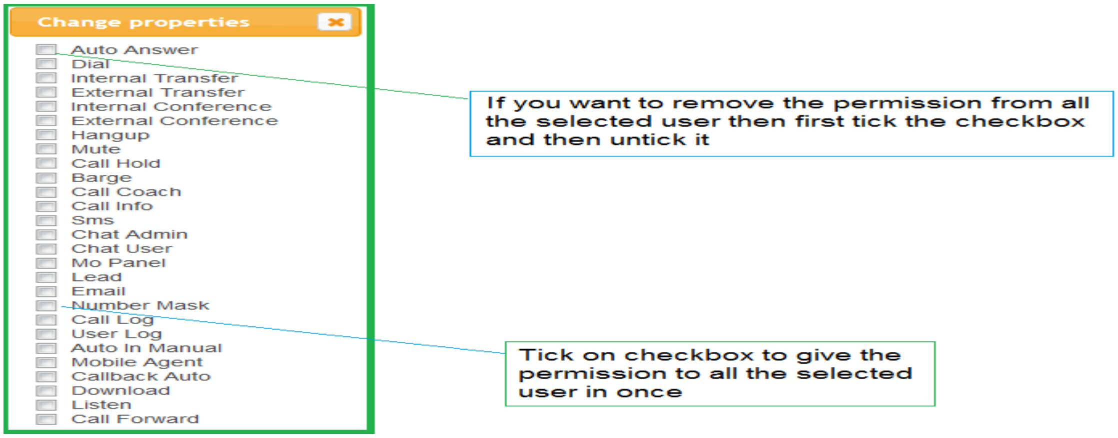
(ii) <u>Change Properties for bulk User</u>

Step1: Go to system configuration menu, Click User sub menu to enable appearance of user page



Step2: When user page appears, tick the checkboxes to select the multiple users

Step3: After that click on "Change Properties" icon to open dialog box as shown below:



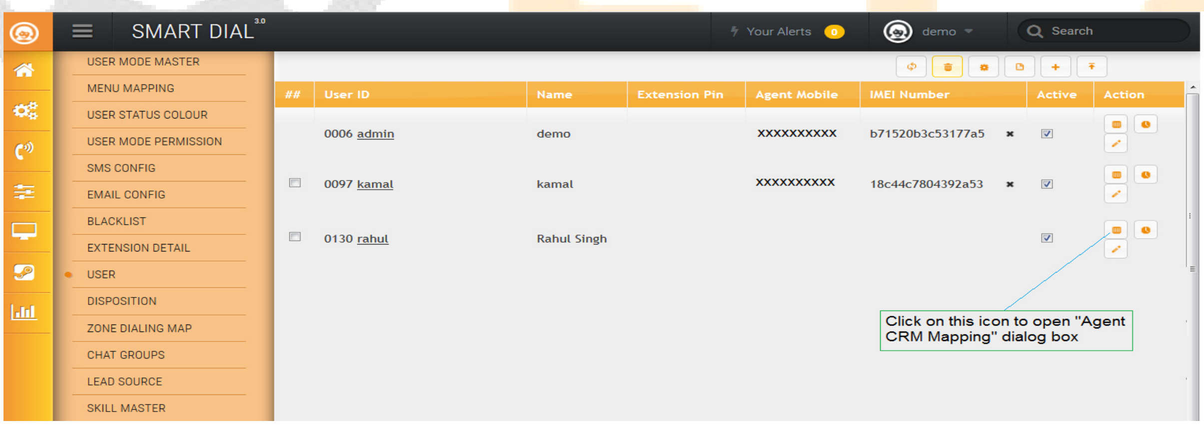
Step4: When change properties dialog box open, tick on checkboxes to give the permission to all the selected user in once

Step5: If you want to remove the permission from all the selected user then first tick the checkboxes of properties and then uncheck it

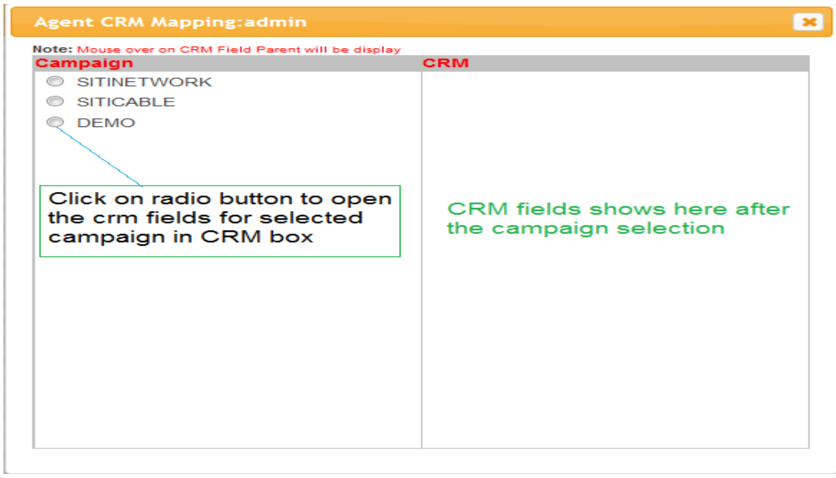
7. Agent CRM Mapping

This mechanism is used to map the CRM fields to selected user.

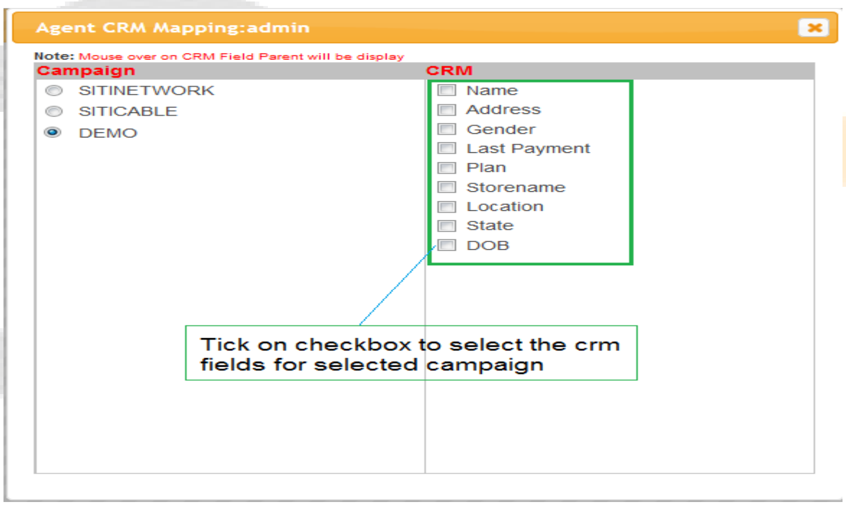
Step1: Go to system configuration menu, Click User sub menu to enable appearance of user page



Step2: Click on “Agent CRM Mapping” icon to open the Agent CRM Mapping dialog box as shown in above picture



Step3: When dialog box open then click on radio button to open the crm fields for selected campaign as shown in picture

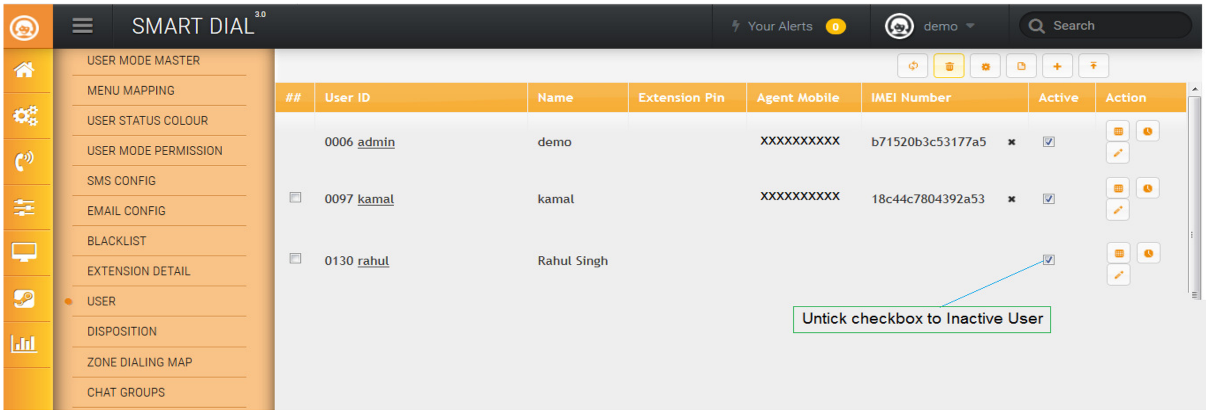


Step4: When user login through the agent application then mapped crm fields shows in CRM tab.

8. Active/Inactive User

This mechanism is used to Inactive/Active user for login in smart agent.

Step1: Go to system configuration menu, Click User sub menu to enable appearance of user page



Step2: Untick on checkbox to inactive user for login in smart agent.

or

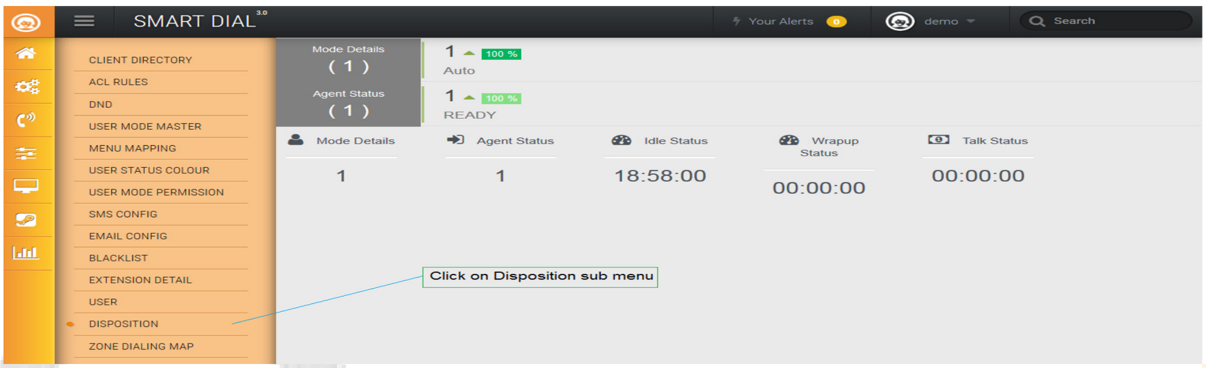
Step2: Tick on Checkbox to active user for login in smart agent.

2.1.a.15 Disposition

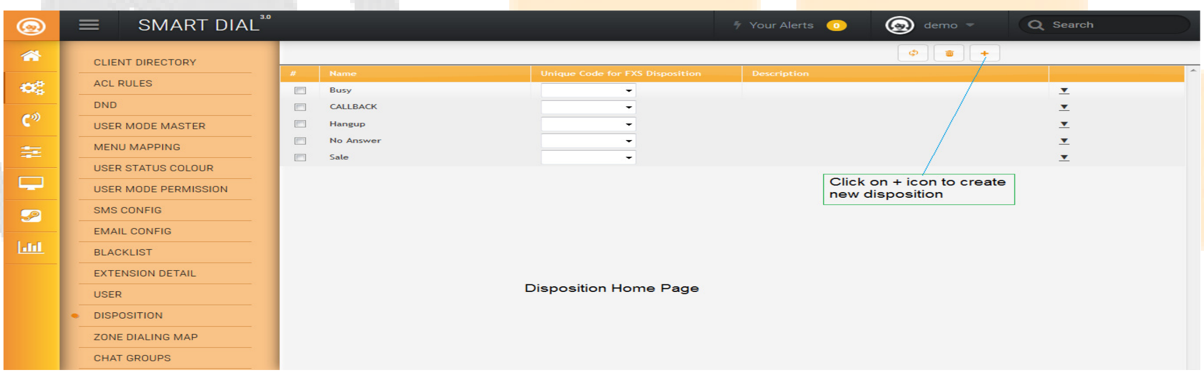
This mechanism facilitates to create/edit/delete disposition and sub disposition.

1. Create New Disposition with sub disposition

Step1: Go to system configuration menu, Click Disposition sub menu to enable appearance of disposition page

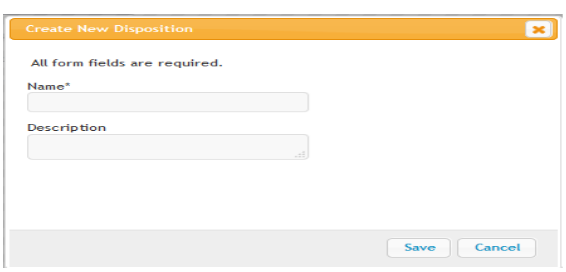


Step2: Disposition Page shows to user with Disposition details which already created in the system

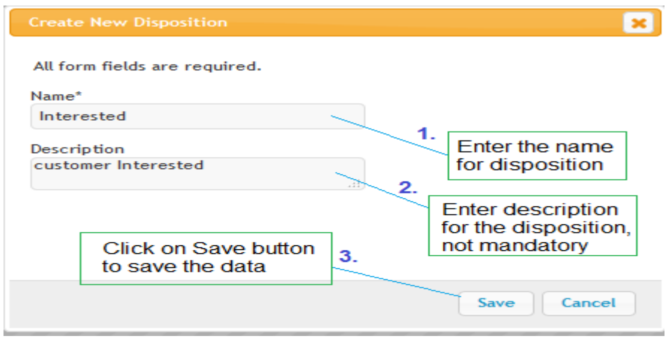


Step3: Click on + icon to add new disposition

Step4: After clicking on + icon, "Create New Disposition" dialog box open

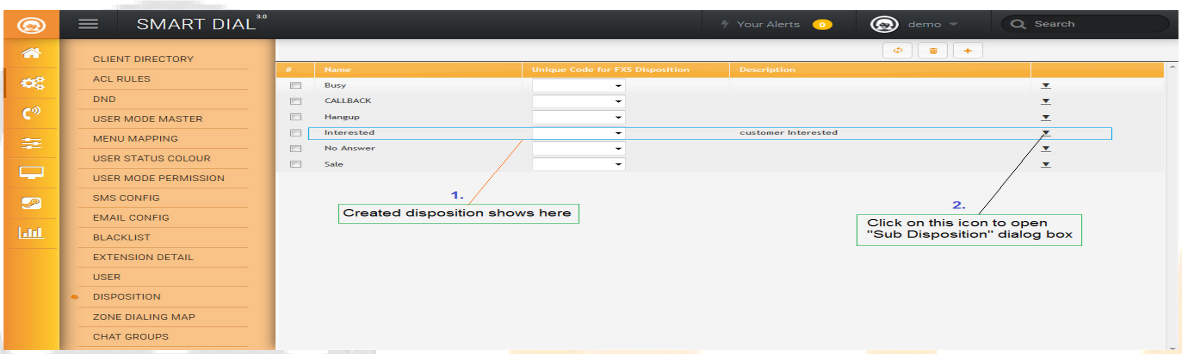


Step5: Then Enter the disposition name in "Name" field (Mandatory)



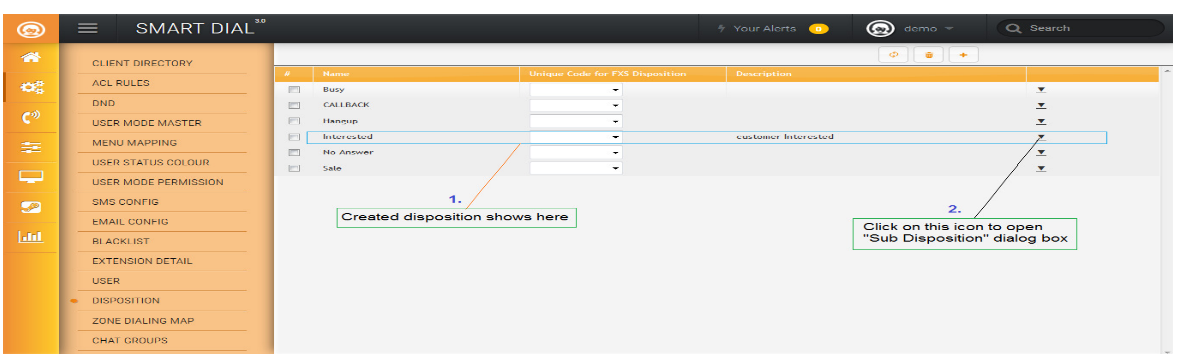
Step6: and Enter the details for disposition in "Description" field (Optional)

Step7: At last click on Save button to Save the disposition

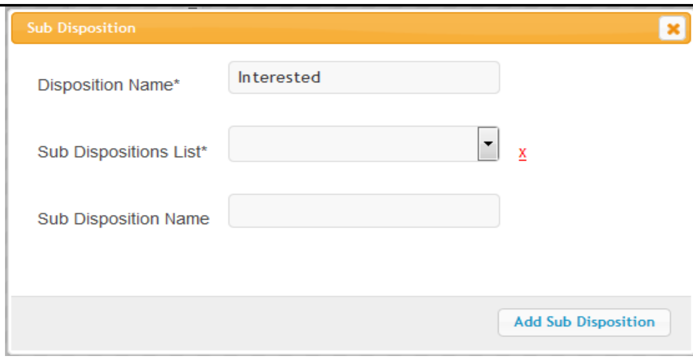


Step8: When data saved then created disposition shows on the disposition page

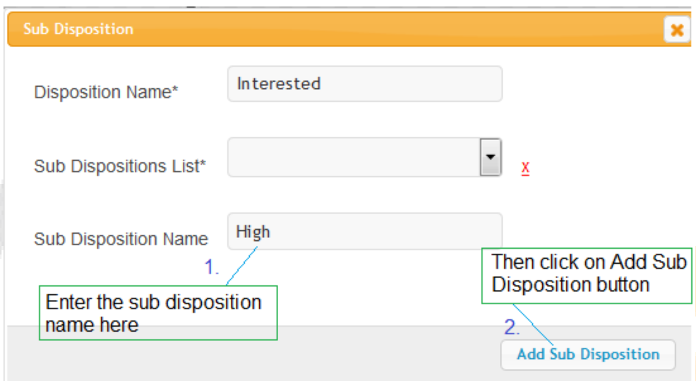
Step9: Then click on this ▼ icon to open sub disposition dialog box



Step10: “Sub disposition” dialog box appears as follows:



Step11: Then Enter the sub disposition name in `Sub Disposition Name` textbox



Step12: After that click on Add Sub Disposition button to save it

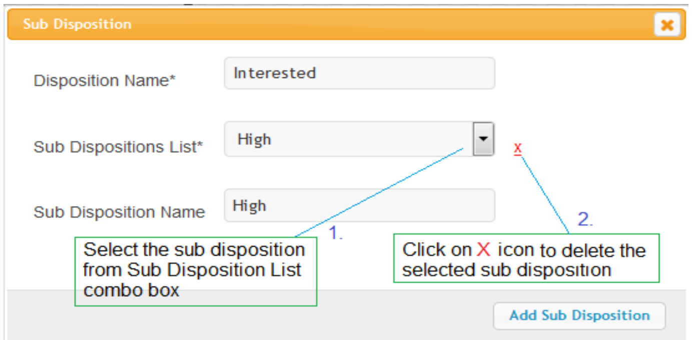
Step13: As we click on that button created sub disposition name shows in `Sub Disposition List` combo box

2. Delete Sub Disposition

Step1: Consider the steps as above for sub disposition creation

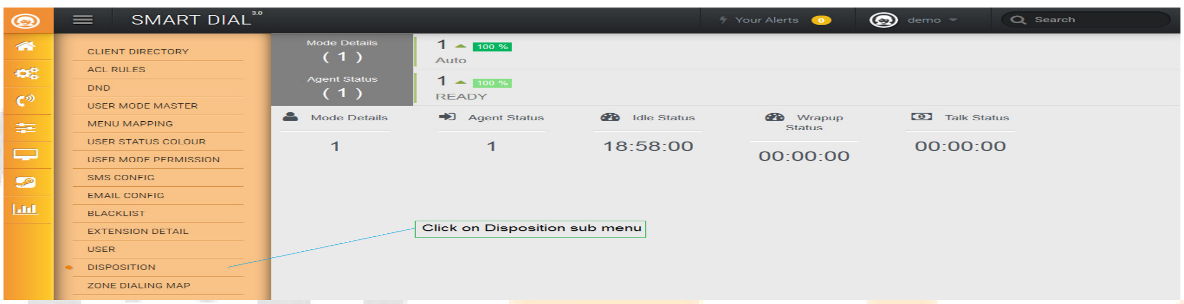
Step2: Then select the sub disposition from “Sub Disposition List” combo box

Step3: At last click on `x` icon to delete the selected disposition

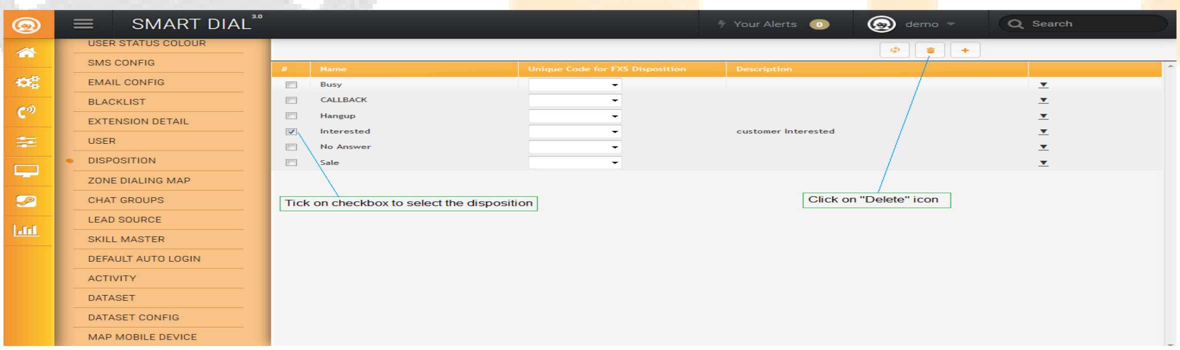


3. Delete Disposition

Step1: Go to system configuration menu, Click Disposition sub menu to enable appearance of disposition page

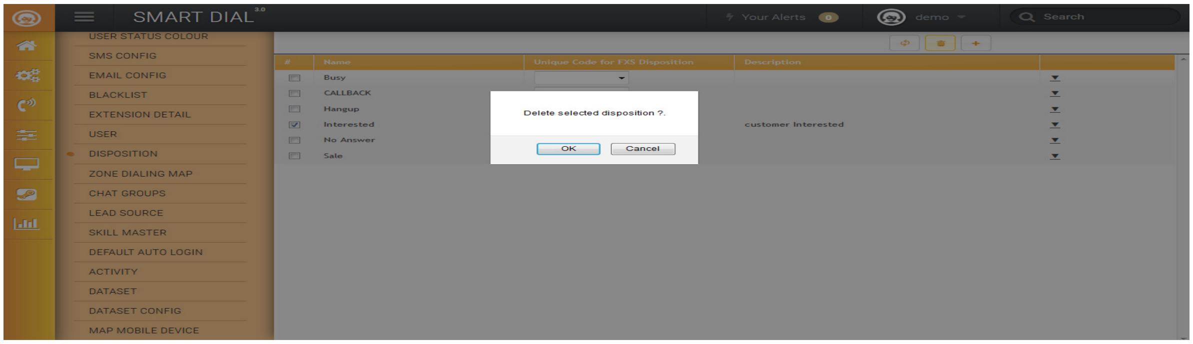


Step2: Disposition Page shows to user with Disposition details which already created in the system



Step3: Now choose to tick a checkbox near the disposition.

Step4: After clicking the delete icon, a popup message asking a confirmation for delete



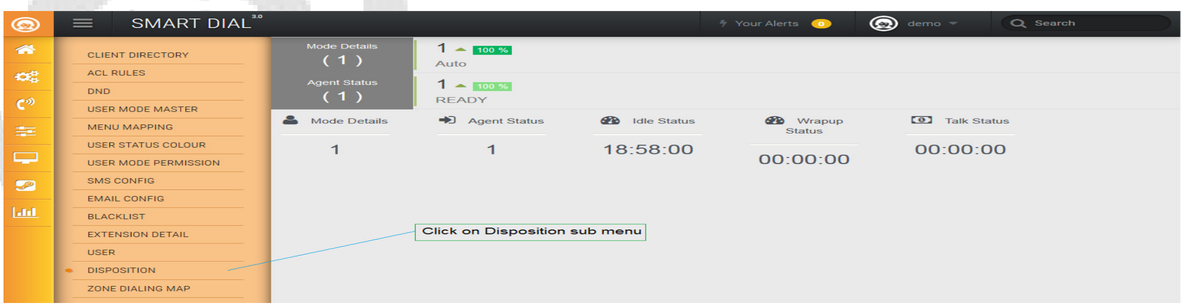
Step5: Now click on the “Ok” button, which will result removal of that data.

4. Unique Code for the FXS Disposition

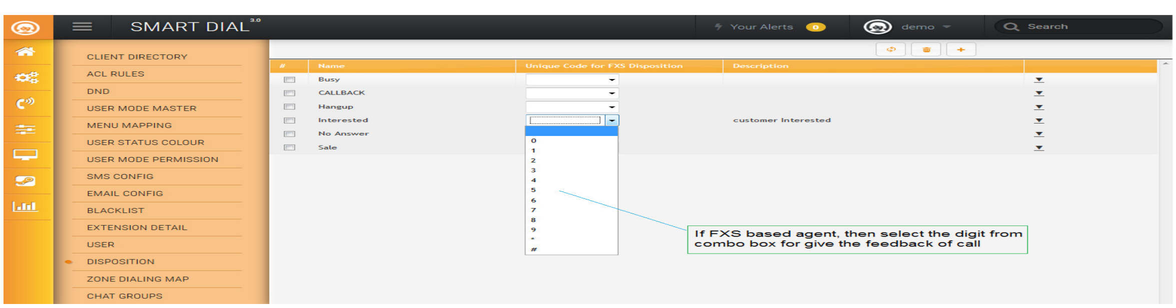
This mechanism is used for FXS agent.

Unique code of digits used to give the feedback of call.

Step1: Go to system configuration menu, Click Disposition sub menu to enable appearance of disposition page



Step2: Disposition Page shows to user with Disposition details which already created in the system



Step3: Select the digit from “Unique Code for FXS Disposition” column against the disposition as shown in above picture.

2.1.a.16 Zone Dialing Map

This mechanism is used for International calling.

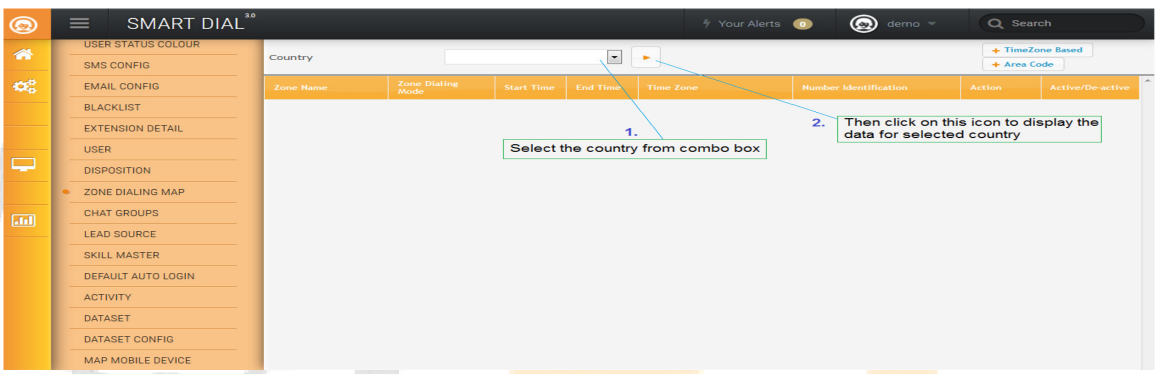
1. `TimeZone Based` Dialing

TimeZone Based dialing works on the basis of Country, Zone Name, Zone time, State Name, State Character code and State time.

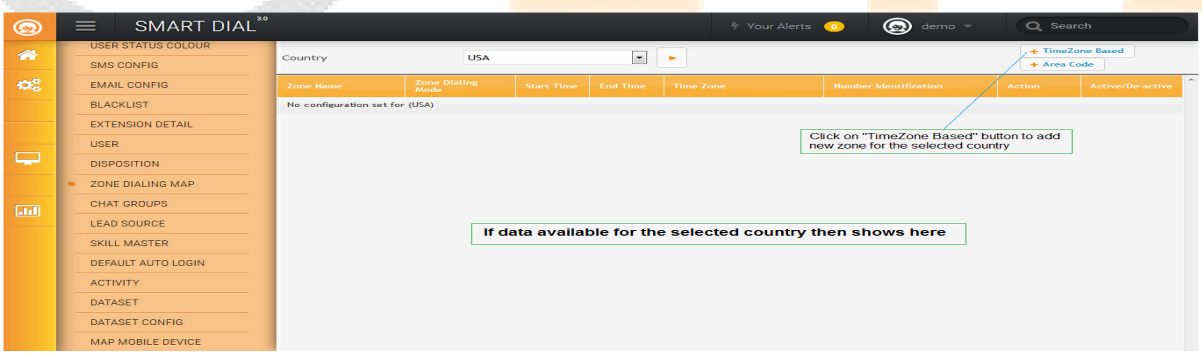
Add New Zone (TimeZone Based)

Step1: Go to system configuration menu, Click on “Zone Dialing Map” sub menu to enable appearance of Zone dialing Map page

Step2: Zone Dialing page appears as follows:

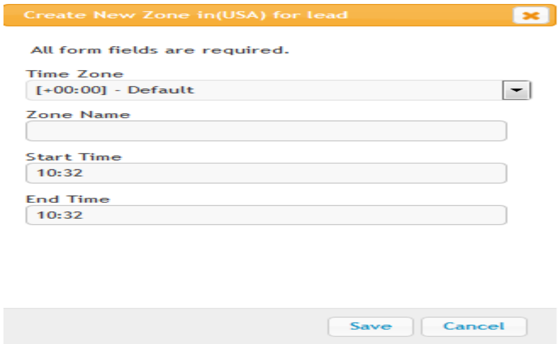


Step3: Select the country from country combo box, and then click on this  icon to display the data for selected country.

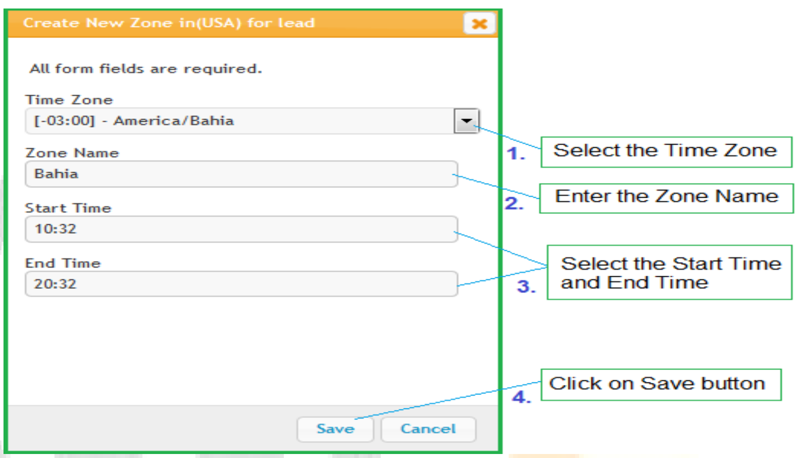


Step4: If data available for the selected country then data shows on Zone dialing map page otherwise message shows as “No configuration set for (XXX)

Step5: After click on “TimeZone Based” button, Create New Zone dialog box appears as follows:



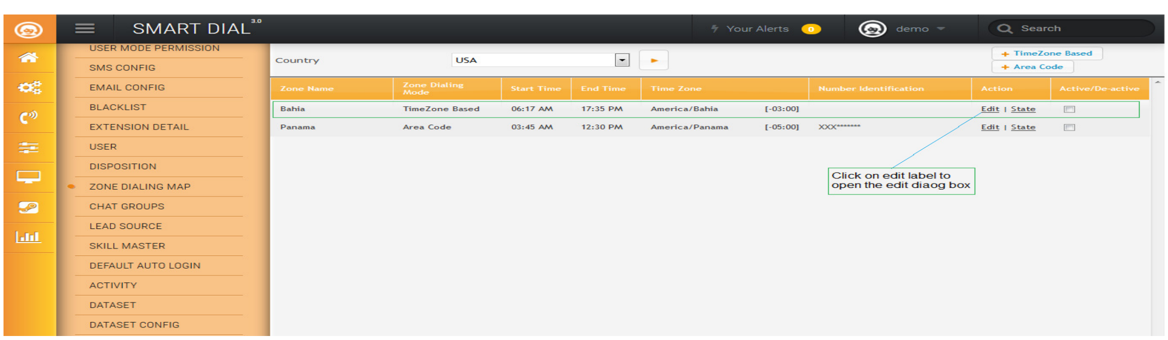
Step6: Then fill up the appropriate data in Time Zone, Zone Name, Start Time and End Time as shown in below picture



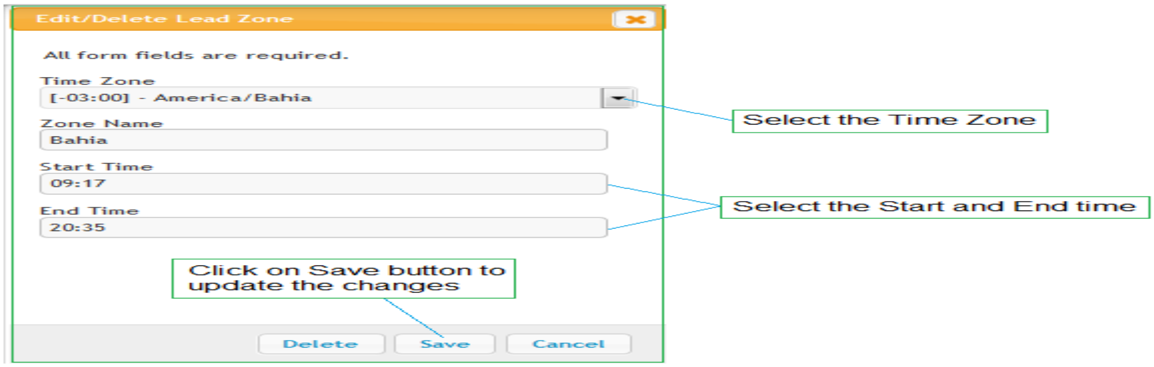
Step7: As we click on Save button, data saved and Zone Name shows on Zone Dialing map page

Edit Zone (TimeZone Based)

Step1: When zone name shows on zone dialing map page then click on Edit label as shown in picture



Step2: Edit Zone dialing box appears as follows:

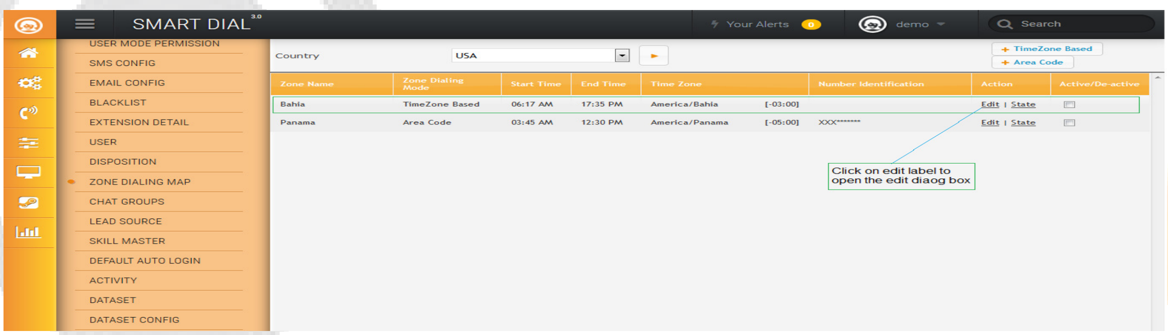


Step3: Edit option available on Time Zone, Start and End time

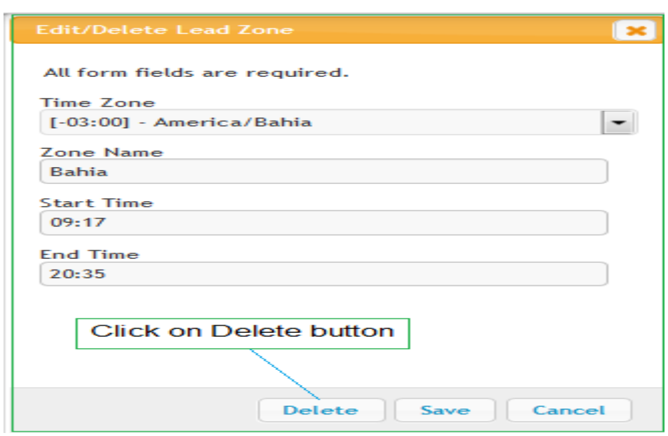
Step4: When edition done then click on Save button to update the changes.

Delete Zone (TimeZone Based)

Step1: When zone name shows on zone dialing map page then click on Edit label as shown in picture



Step2: Edit Zone dialing box appears as follows:

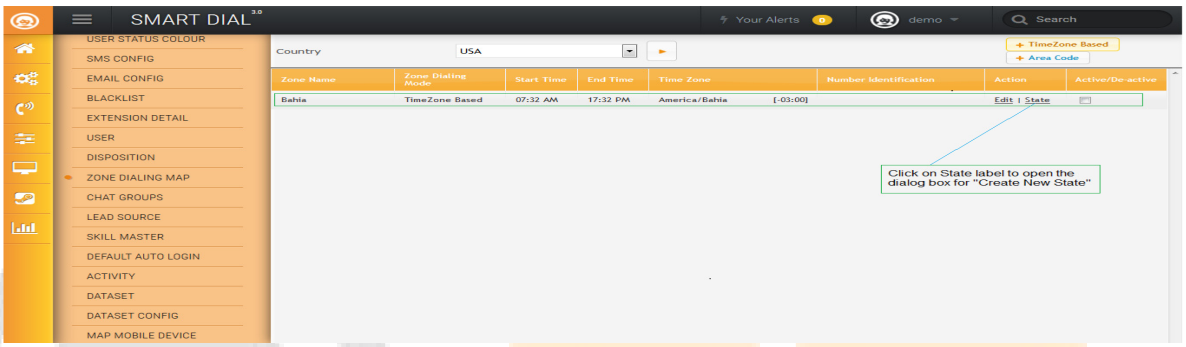


Step3: After clicking the delete button, a popup message asking for confirmation of delete

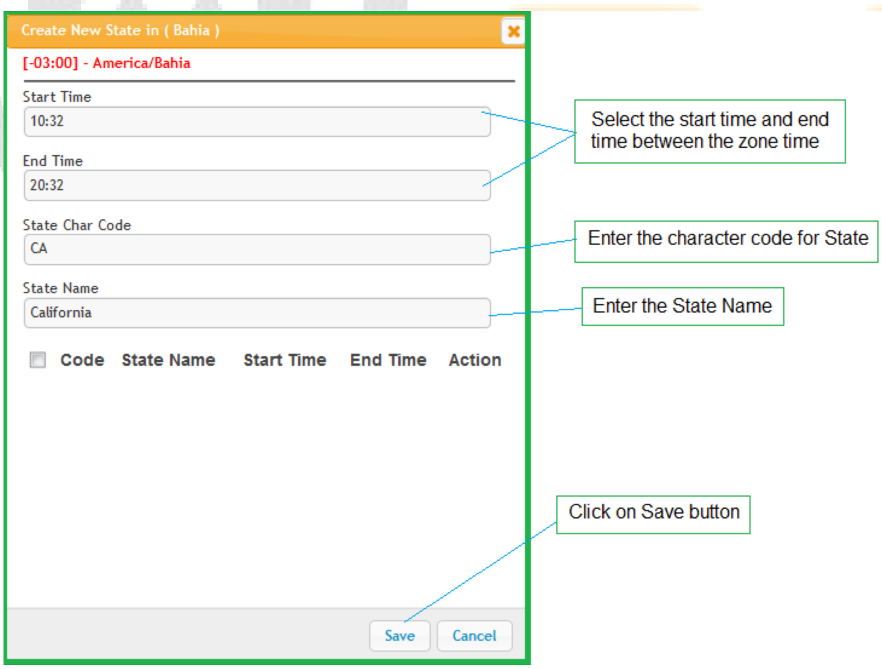
Step4: Now click on the “Ok” button, which will result removal of that data.

Add New State (TimeZone Based)

Step1: When zone name shows on zone dialing map page then click on State label as shown in picture

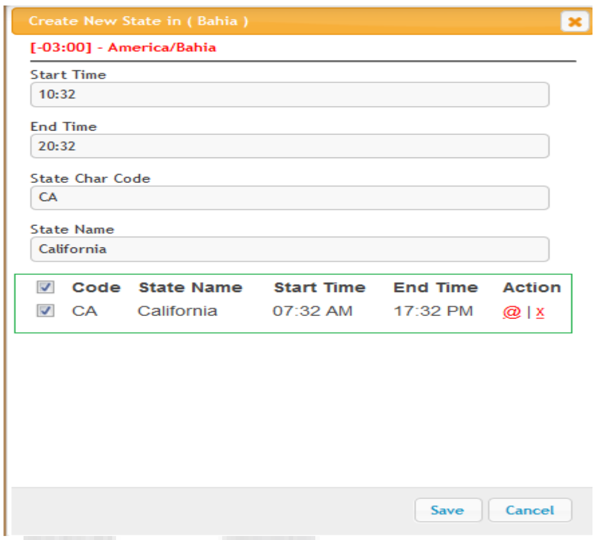


Step2: Create New State dialog appears as follows:



Step3: Then fill up the appropriate data in Start Time, End Time, State Character Code and State Name as shown in above picture

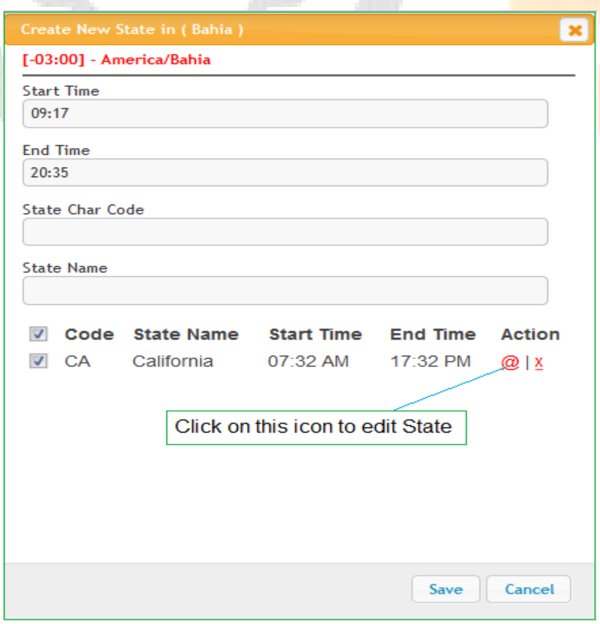
Step4: As we click on Save button, data saved and State Name shows as follows:



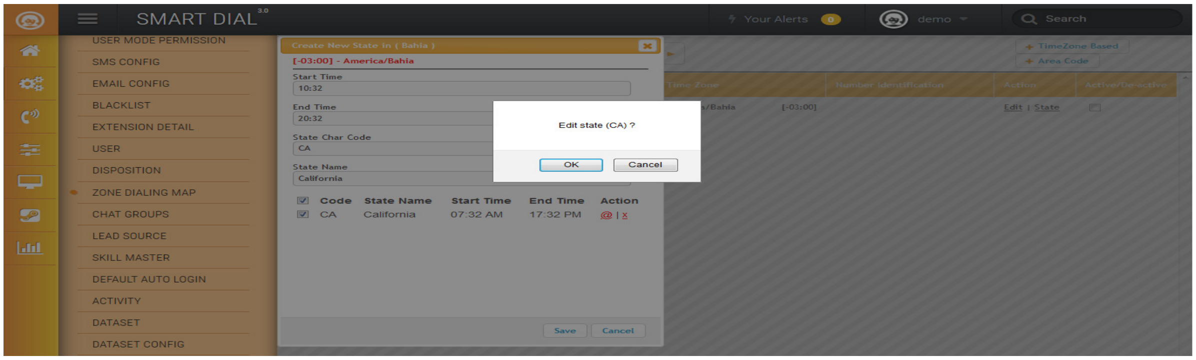
Edit State (TimeZone Based)

Step1: Consider the steps as above for opening dialog box of Add State

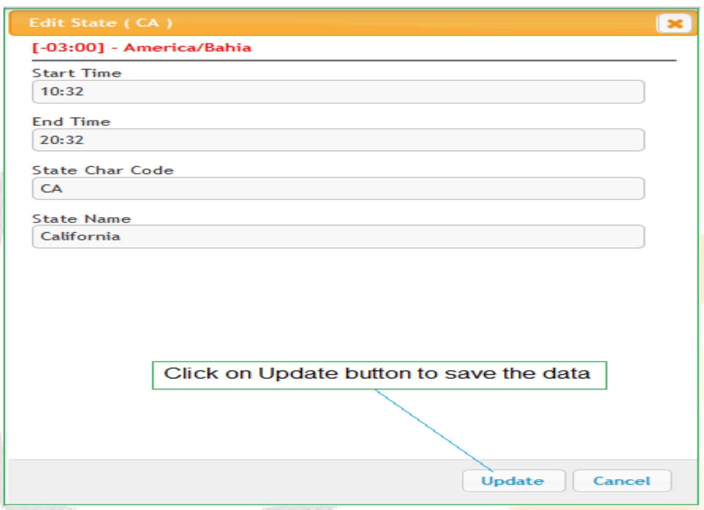
Step2: When State name shows as below in picture



Step3: Then we click on edit @ icon, a popup dialog box open for confirmation message



Step4: Click on Ok button to open the edit dialog box



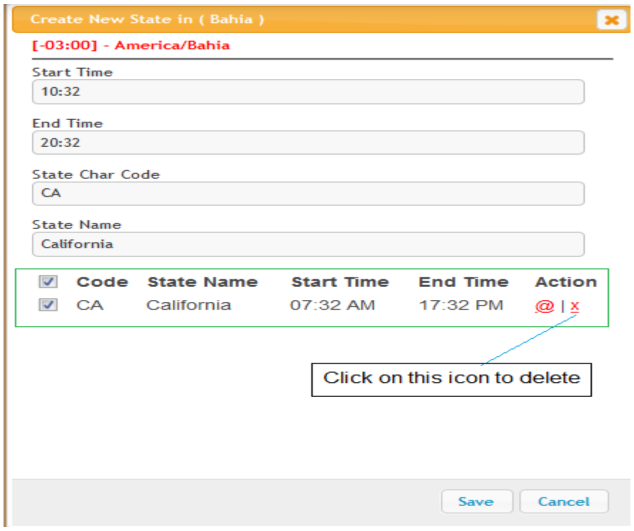
Step5: Edition option available on Start time, End time and State Name

Step6: When edition done then click on Update button

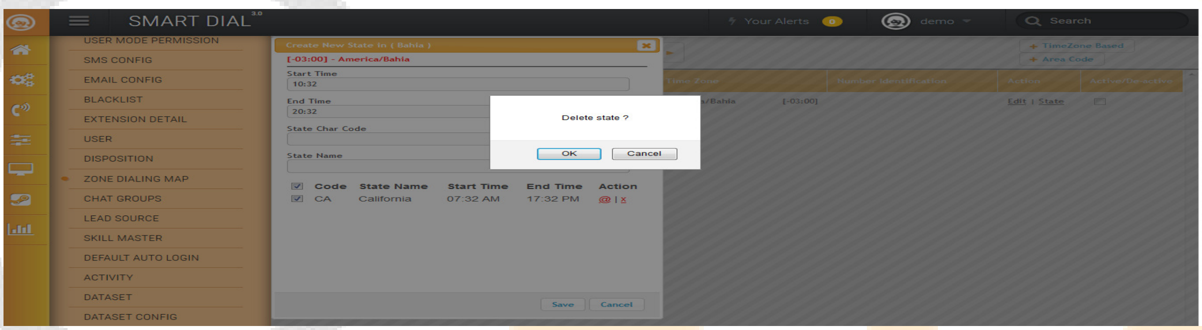
Delete State (TimeZone Based)

Step1: Consider the steps as above for opening dialog box of Add State

Step2: When State name shows as below in picture



Step3: After clicking the delete x icon, a popup message asking a confirmation for delete

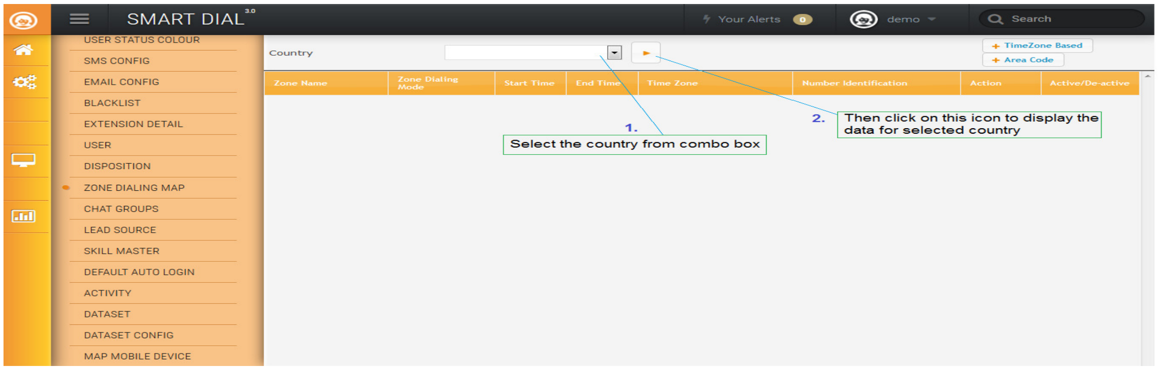


Step4: Now click on the "Ok" button, which will result removal of that data.

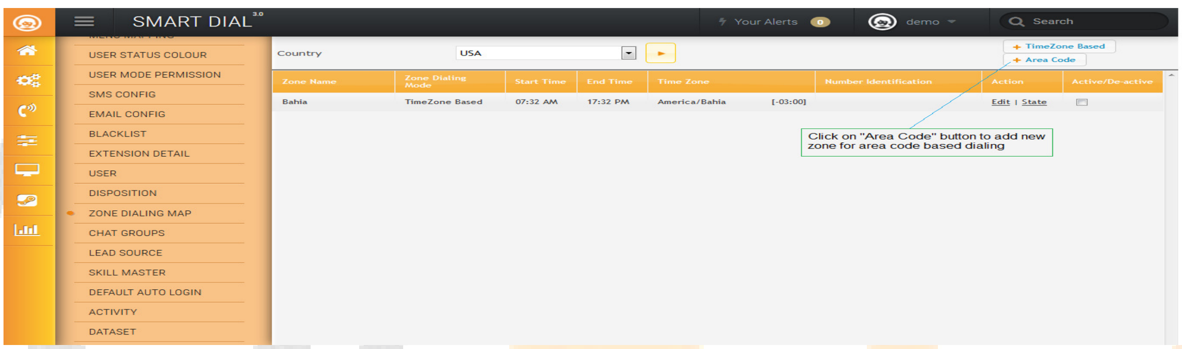
2. Add New Zone with the help of `Area Code` button

Area Code dialing works on the basis of Country, Zone Name, Zone time, State Name, State Character code and State time.

Step1: Go to system configuration menu, Click on "Zone Dialing Map" sub menu to enable appearance of zone dialing map page

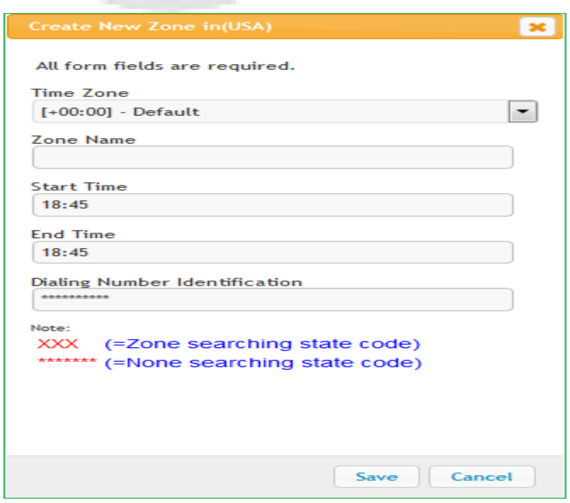


Step2: Select the country from country combo box, and then click on this  icon to display the data for selected country.



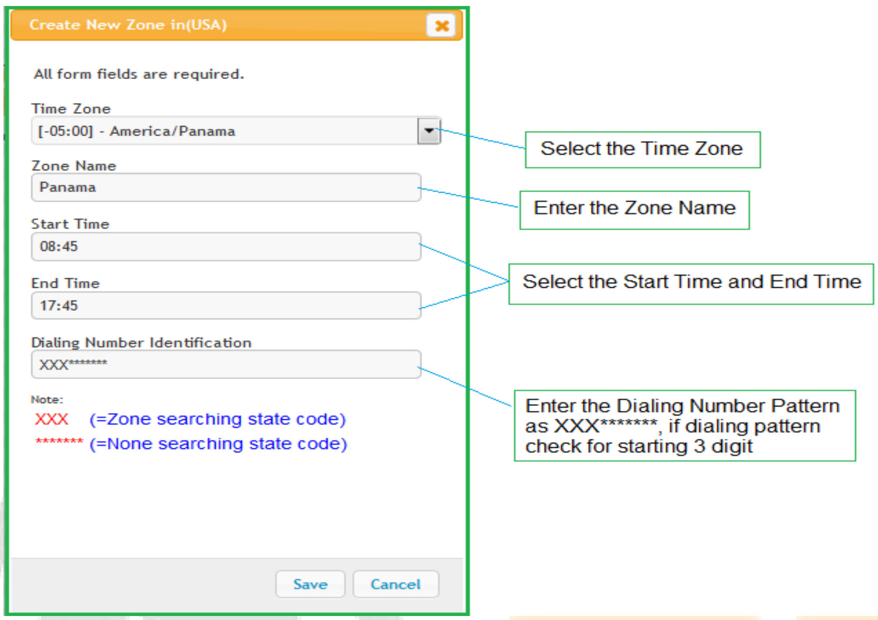
Step3: If data available for the selected country then data shows on Zone dialing map page otherwise message shows as "No configuration set for (XXX)

Step4: After click on "Area Code" button, Create New Zone dialog box appears as follows:

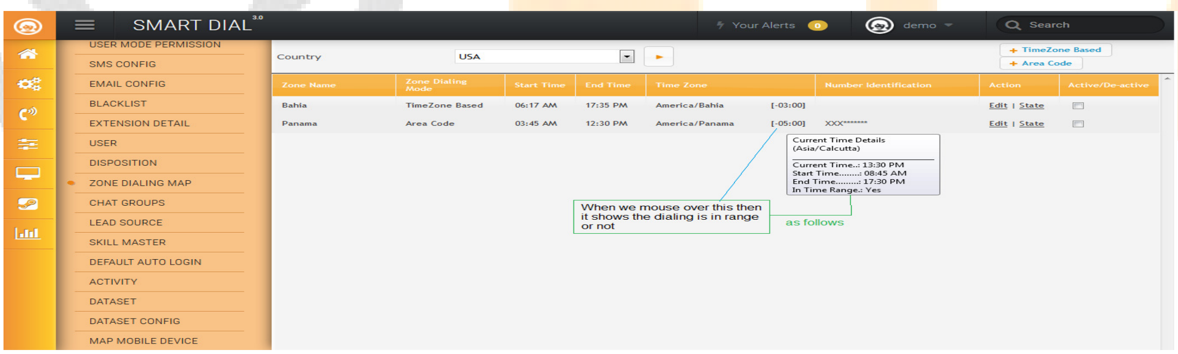


Step6: Then fill up the appropriate data in Time Zone, Zone Name, Start Time, End Time and Dialing Number Identification as

shown in below picture

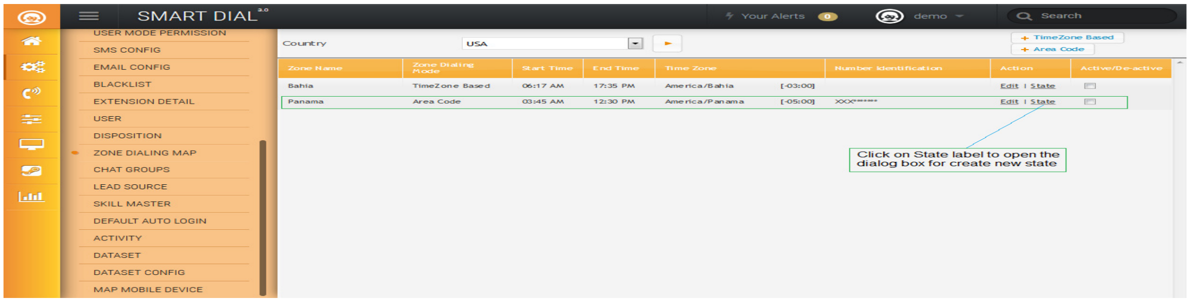


Step7: As we click on Save button, data saved and Zone Name shows on Zone Dialing map page

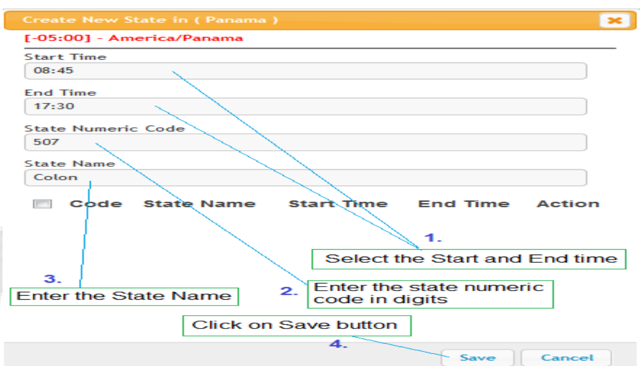


Add New State for the Zone (Area Code)

Step1: When zone name shows on zone dialing map page then click on State label as shown in picture

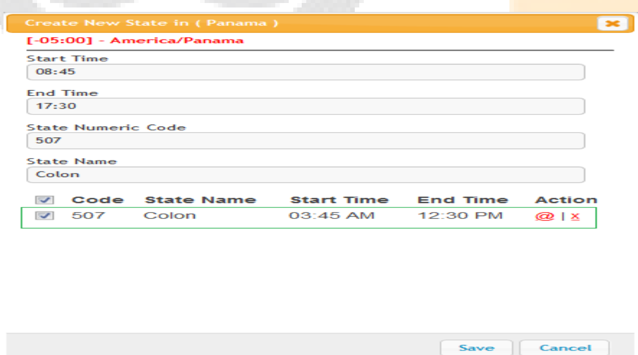


Step2: Create New State dialog appears as follows:



Step3: Then fill up the appropriate data in Start Time, End Time, State Numeric Code and State Name as shown in above picture

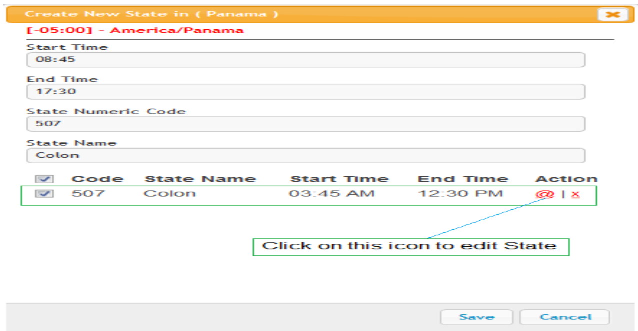
Step4: As we click on Save button, data saved and State Name shows as follows:



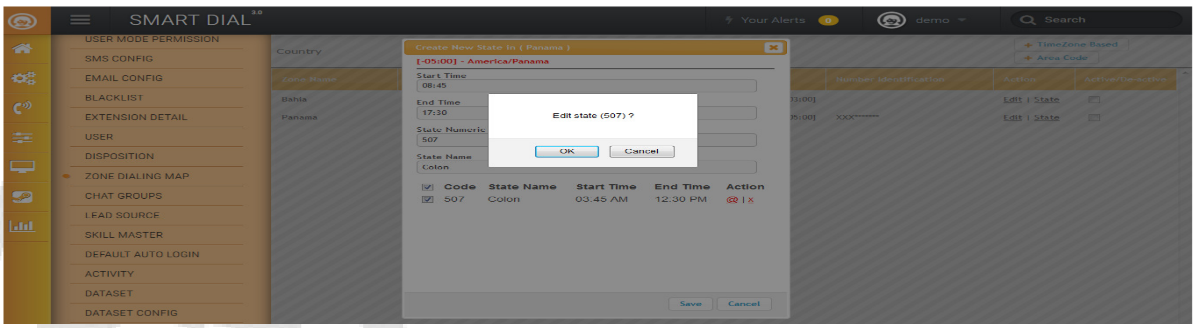
Edit State for the Zone (Area Code)

Step1: Consider the steps as above for opening dialog box of Add State

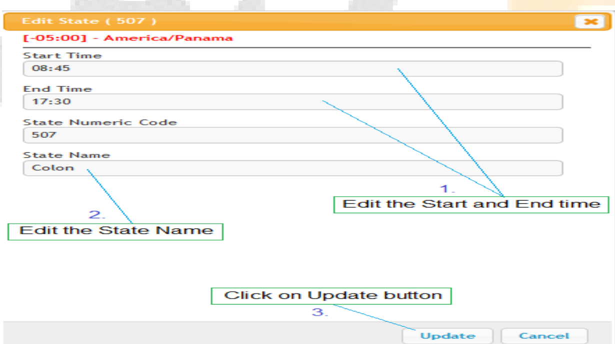
Step2: When State name shows as below in picture



Step3: Then we click on edit @ icon, a popup dialog box open for confirmation message



Step4: Click on Ok button to open the edit dialog box



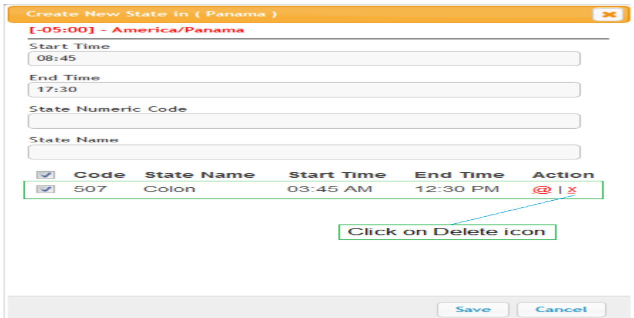
Step5: Edition option available on Start time, End time and State Name

Step6: When edition done then click on Update button

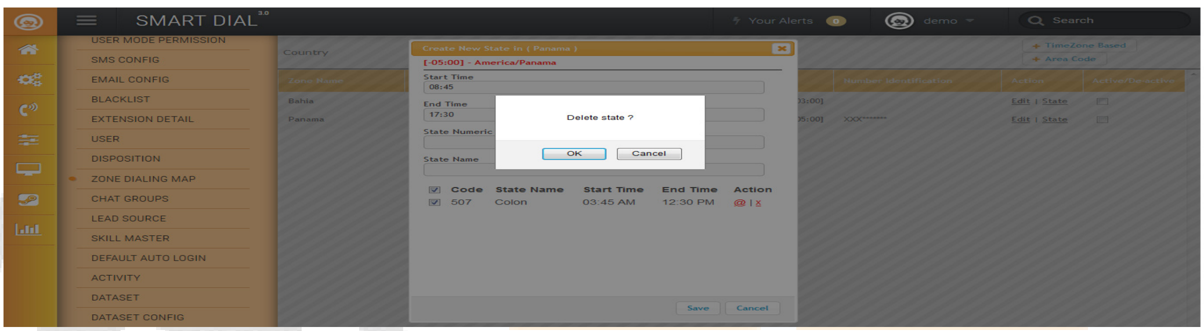
Delete State for the Zone (TimeZone Based)

Step1: Consider the steps as above for opening dialog box of Add State

Step2: When State name shows as below in picture



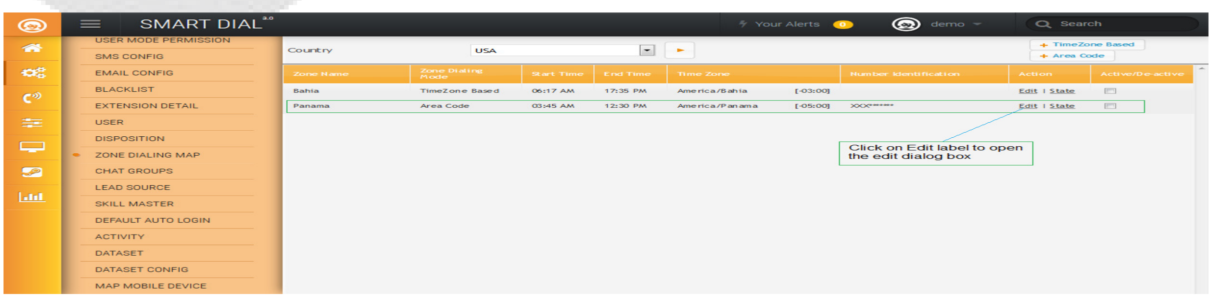
Step3: After clicking the delete x icon, a popup message asking a confirmation for delete



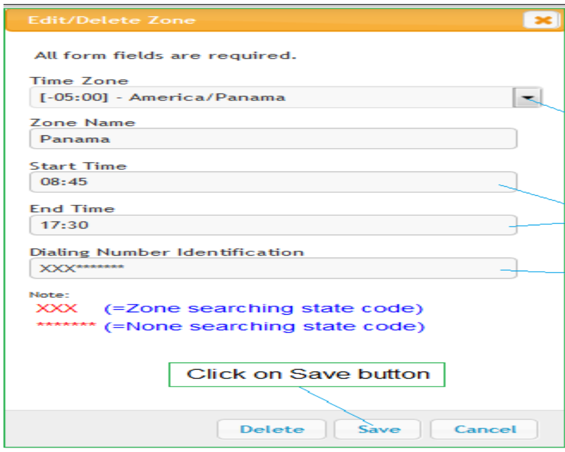
Step4: Now click on the "Ok" button, which will result removal of that data.

Edit Zone (Area Code)

Step1: When zone name shows on zone dialing map page then click on Edit label as shown in picture



Step2: Edit Zone dialing box appears as follows:

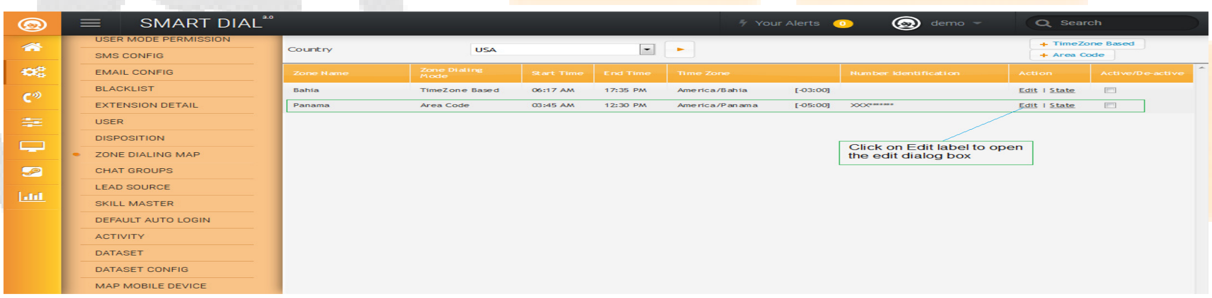


Step3: Edit option available on Time Zone, dialing number identification, Start and End time

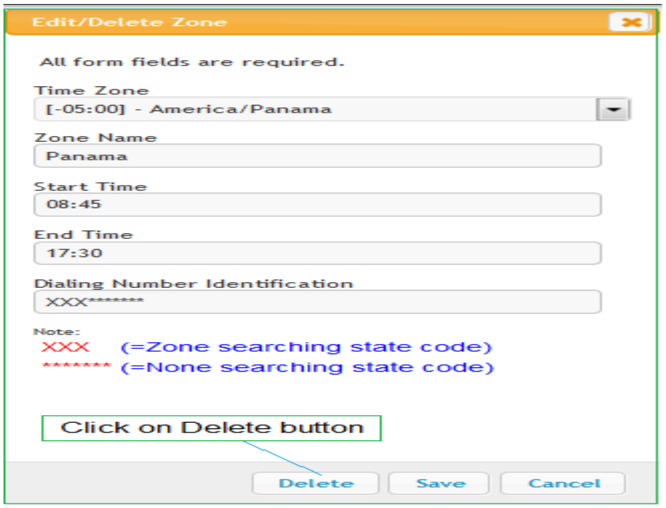
Step4: When edition done then click on Save button to update the changes.

Delete Zone (Area Code)

Step1: When zone name shows on zone dialing map page then click on Edit label as shown in picture



Step2: Edit Zone dialing box appears as follows:

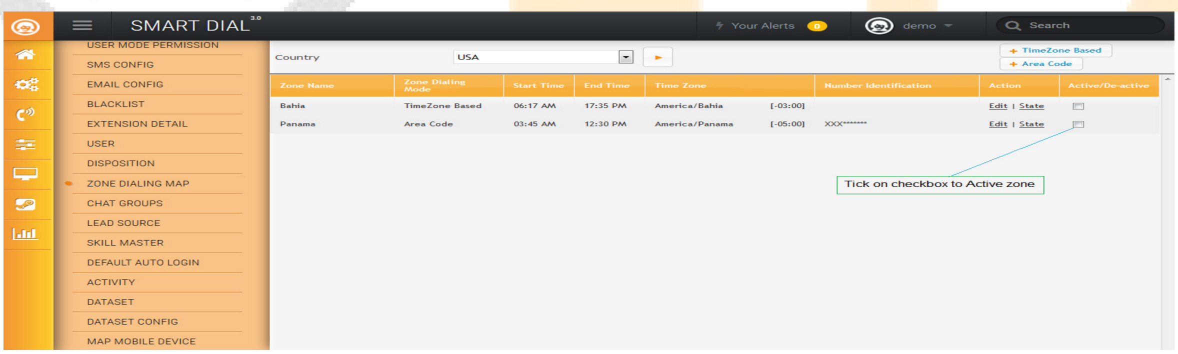


Step3: After clicking the delete button, a popup message asking confirmation for delete

Step4: Now click on the "Ok" button, which will result removal of that data.

3. Active/Inactive Zone

Step1: When zone name shows on zone dialing map page then click on Edit label as shown in picture



Step2: Tick checkbox to active the zone for dialing

Or

Step2: Untick on checkbox to Inactive the zone for dialing.

2.1.a.17 Chat Groups

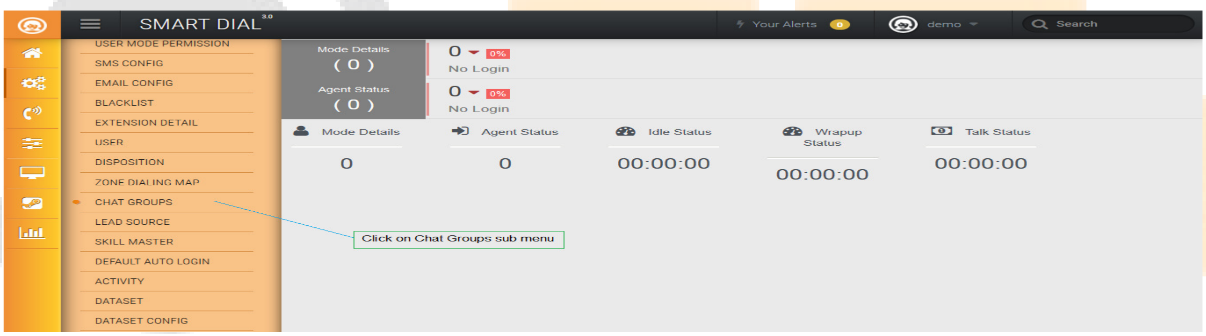
This mechanism is used to create chat group and map that group to users

Chat functionality are as follows:

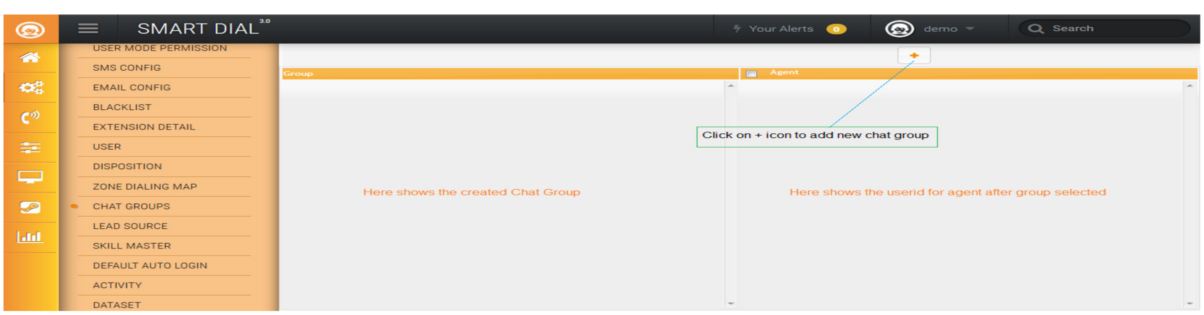
(i) Text chat option only available
(ii) Agent in the same campaign can chat with TL if and only if they had the permission for Chat Admin (from User sub menu) through Client panel.
(iii) Agent can also chat with other user of the same campaign, if and only if he has the permission for Chat User & Chat Admin (from User sub menu) through Client panel.
(iv) Agent with the Mo Panel permission will be treated as TL, and he can chat with the agents and other TL's in same campaign, if he has the permission for Chat Admin.
(v) There is no need to allow chat user, if you had permission for mo panel.
(vi) One to One chat and Group Chat available

1. Create Chat Group

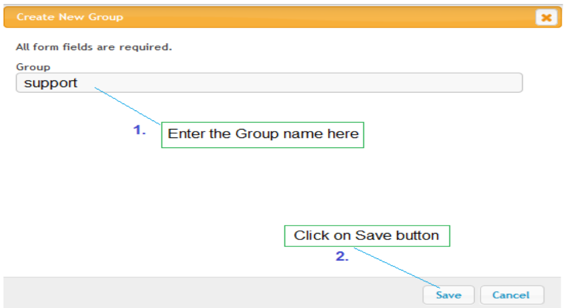
Step1: Go to system configuration menu, Click on "Chat Group" sub menu to enable appearance of Chat Group page



Step2: Chat Group page appears as follows:

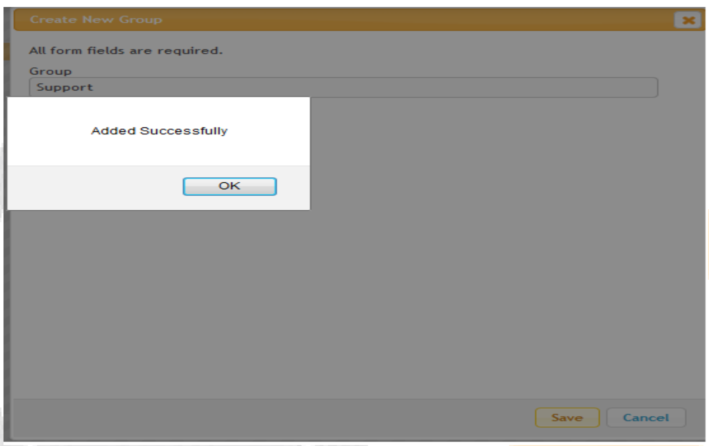


Step3: After click on + icon, a dialog box "Create New Group" appears as follows



Step4: Enter the Group Name in Group textbox, then click on Save button

Step5: After click on Save button then a popup message shows as "Added Successfully"

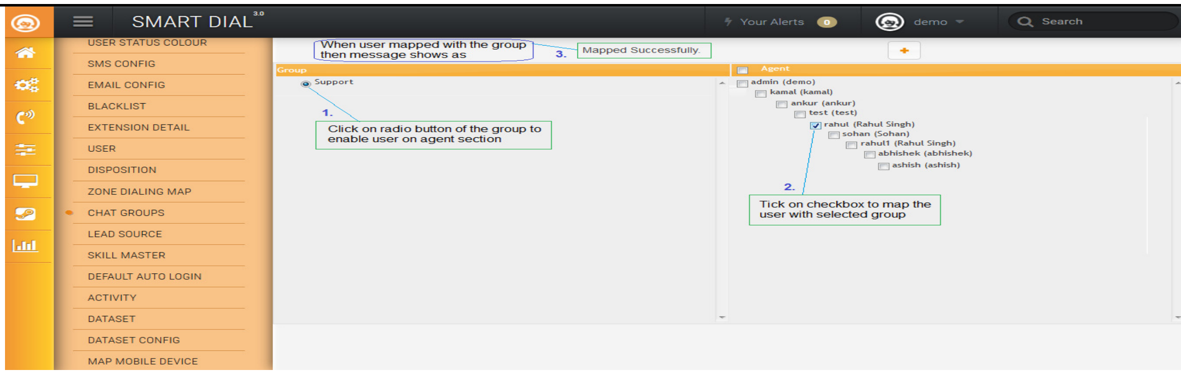


Step6: At last click on Ok button to view the chat group page

2. Group (Chat) mapped to User

Step1: Consider the steps of entering the chat page as above

Step2: Then click on radio button to load the agent on Agent Column



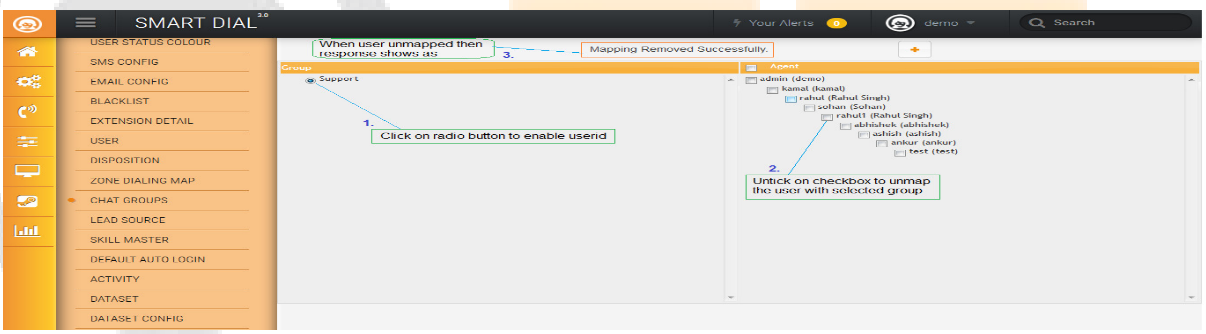
Step3: Tick on userid checkbox to map with the Group as it shown in above picture

Step4: When user mapped with the group then message shows as “Mapped Successfully”

3. Group (Chat) unmapped with User

Step1: Consider the steps of entering the chat page as above

Step2: Then click on radio button to load the agent on Agent Column



Step3: Untick on userid checkbox to remove the mapping with the Group

Step4: When user unmapped with the group then message shows as “Mapped Removed Successfully”

2.1.a.18 Lead Source

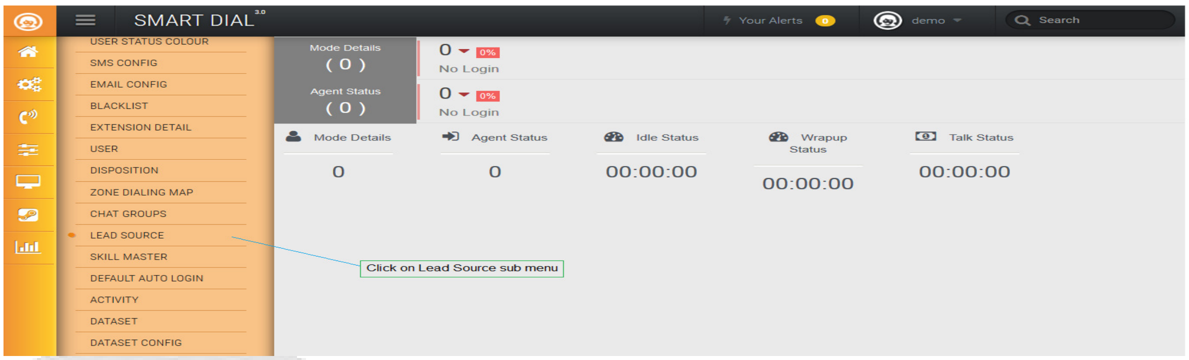
Lead Source mechanism facilitates to create two types of data storage, which are as follows:

1. Callback
2. Lead

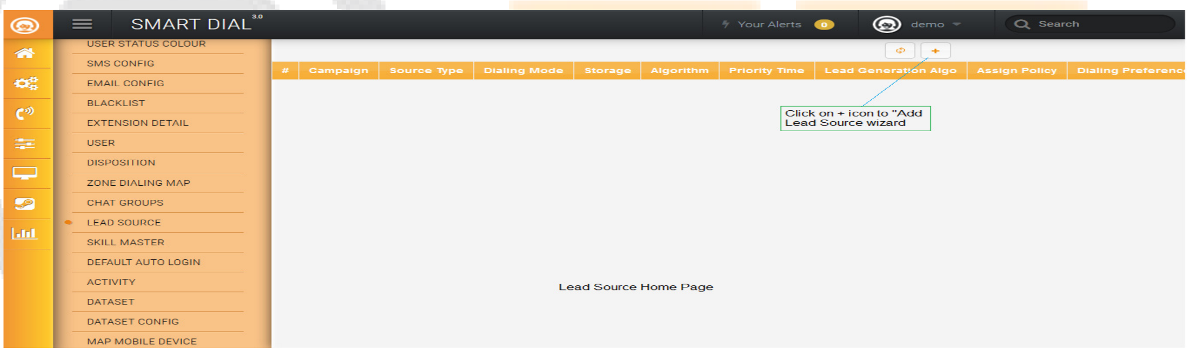
1. Callback - In this facility it enable to create policy that allows to store data in recall table and after that it assign to agent according to assign policy.

Add Lead Source (Callback)

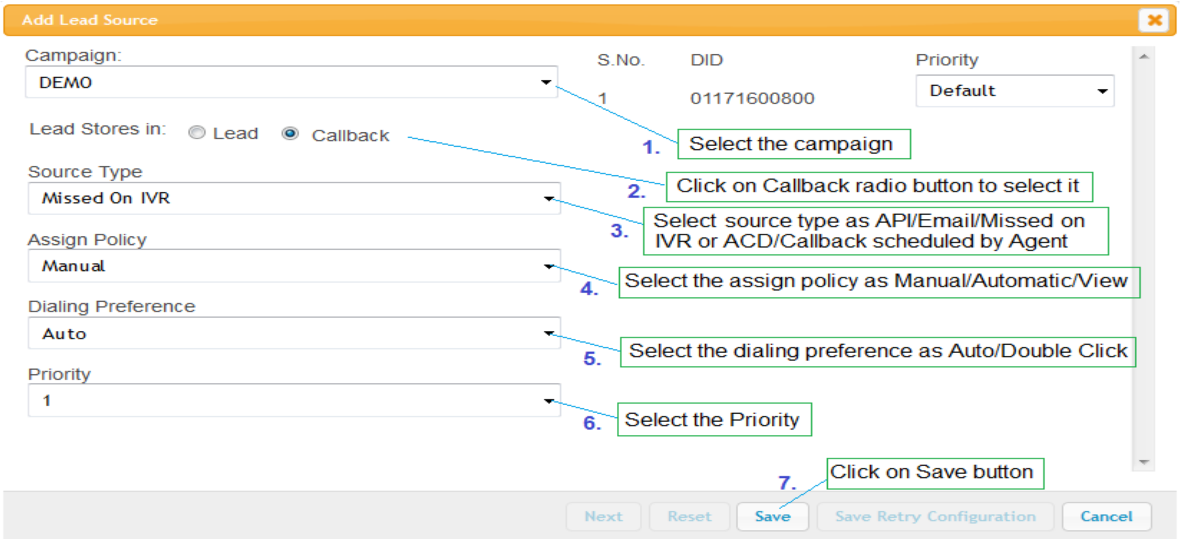
Step1: Go to system configuration menu, Click on “Lead Source” sub menu to enable appearance of Lead Source page



Step2: Lead source page appears as follows:



Step3: Click on + icon to open “Add Lead Source” dialog box



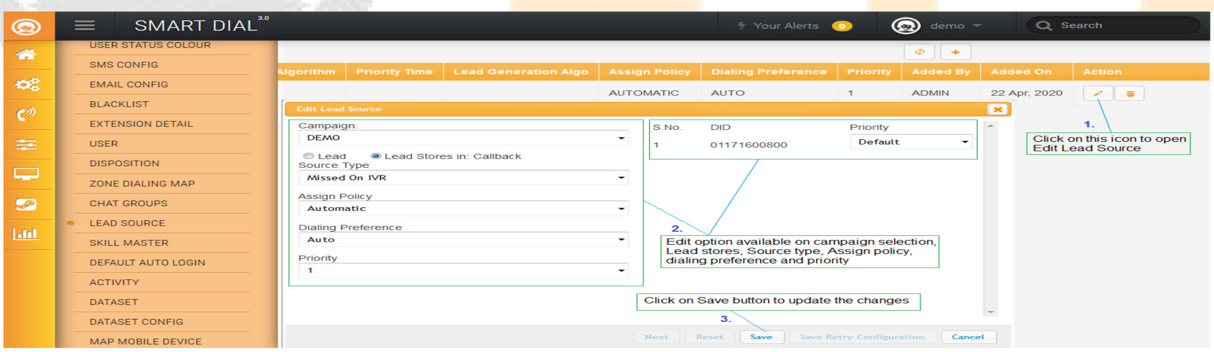
Step4: Then fill up the appropriate data as shown in above picture

Step5: After that click on Save button to save the data

<u>Edit Lead Source (Callback)</u>

Step1: Consider the steps as above for opening Lead Source page

Step2: Lead source page appears as follows:



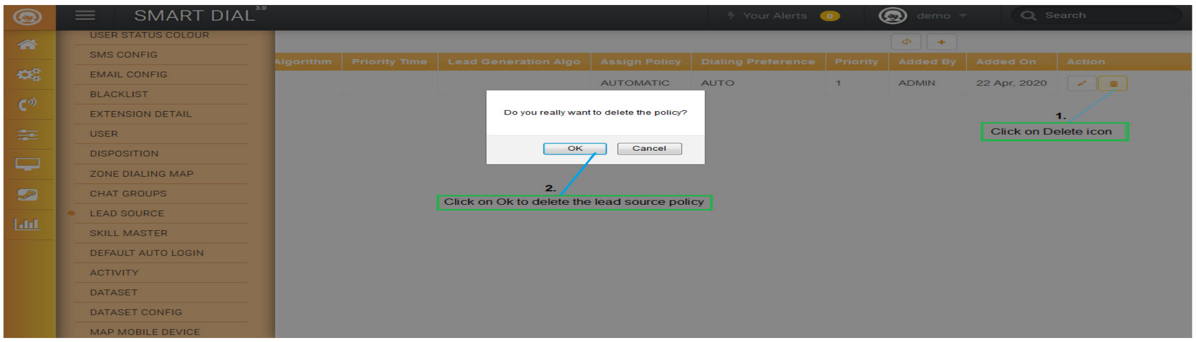
Step3: Then change the appropriate data as shown in above picture

Step4: After that click on Save button to update the changes

<u>Delete Lead Source (Callback)</u>

Step1: Consider the steps as above for opening Lead Source page

Step2: When Lead source page appears, Click on Delete icon to delete the lead source



Step3: After clicking the delete icon, a popup message asking a confirmation for delete

Step4: Now click on the "Ok" button, which will result removal of that lead source policy.

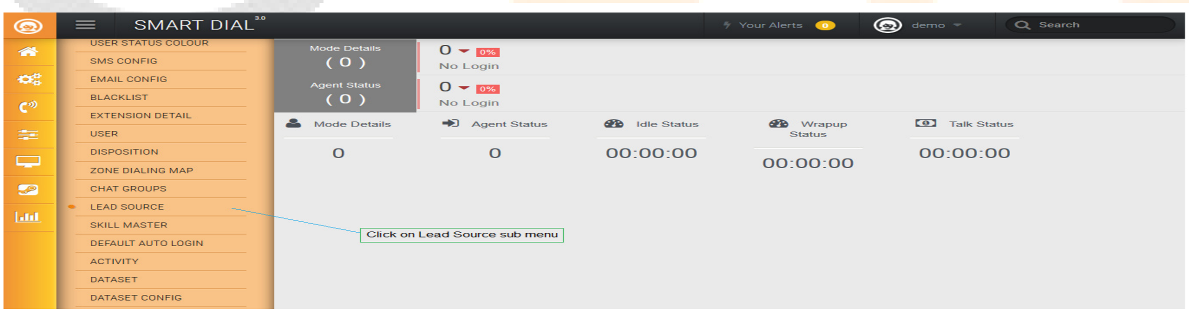
2. Lead – In this facility it enables to create policy that allows automatic lead creation based on sources like data/call received on

API, Missed calls on IVR/ACD and details received via email.

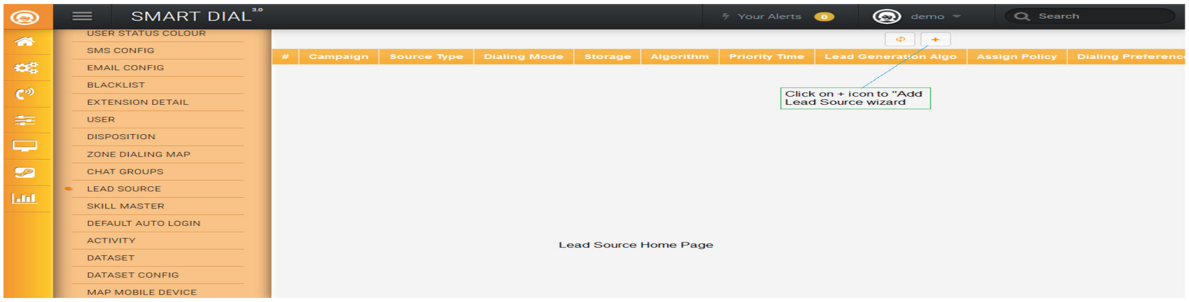
Once policy is created, it will automatically create a lead to dial the numbers which have been abandoned or missed. The patterns can be configured day wise, weekly and monthly.

<u>Add Lead Source (Lead)</u>

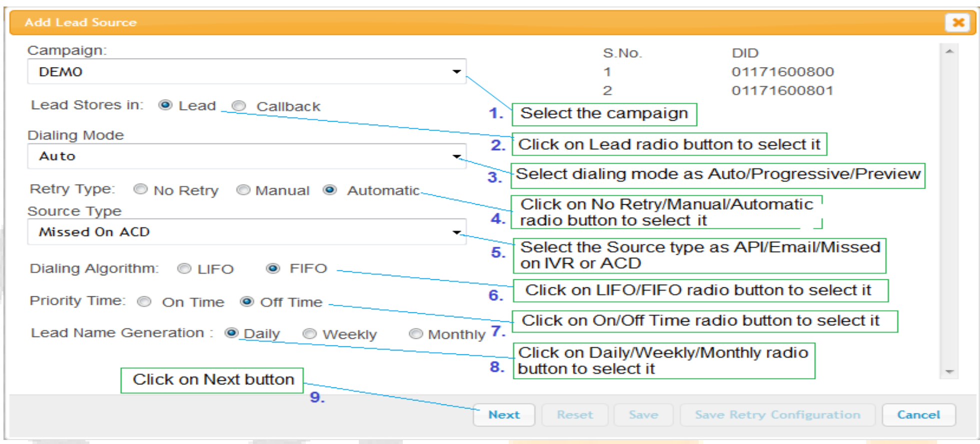
Step1: Go to system configuration menu, Click on "Lead Source" sub menu to enable appearance of Lead Source page



Step2: Lead source page appears as follows:

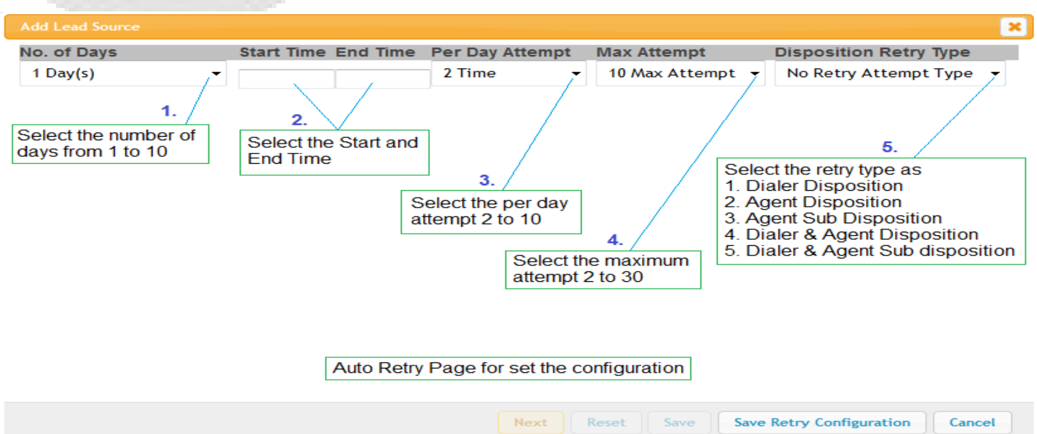


Step3: Click on + icon to open "Add Lead Source" dialog box



Step4: Fill up the appropriate data as shown in above picture then click on "Next" button

Step5: After clicking on Next button page appears as follows:

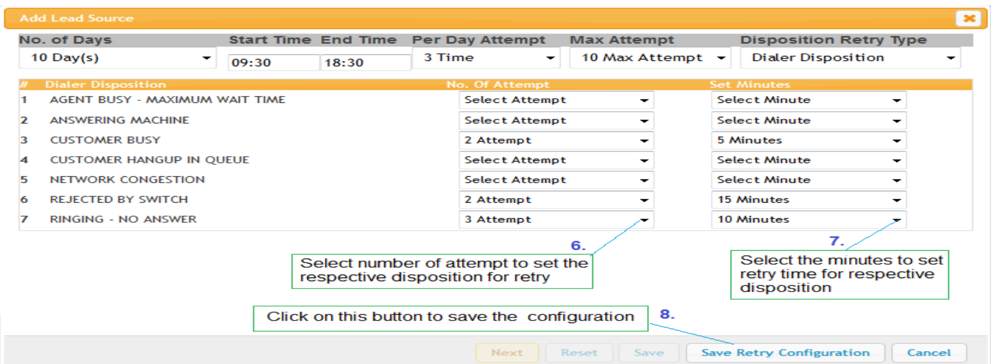


- ➢ Select the number of days from 1 to 10
- ➢ Select the Start and End time

- Select the per day attempt
- Select the maximum attempt
- Select the Disposition retry type

Step5: Fill up the appropriate data as shown in above picture

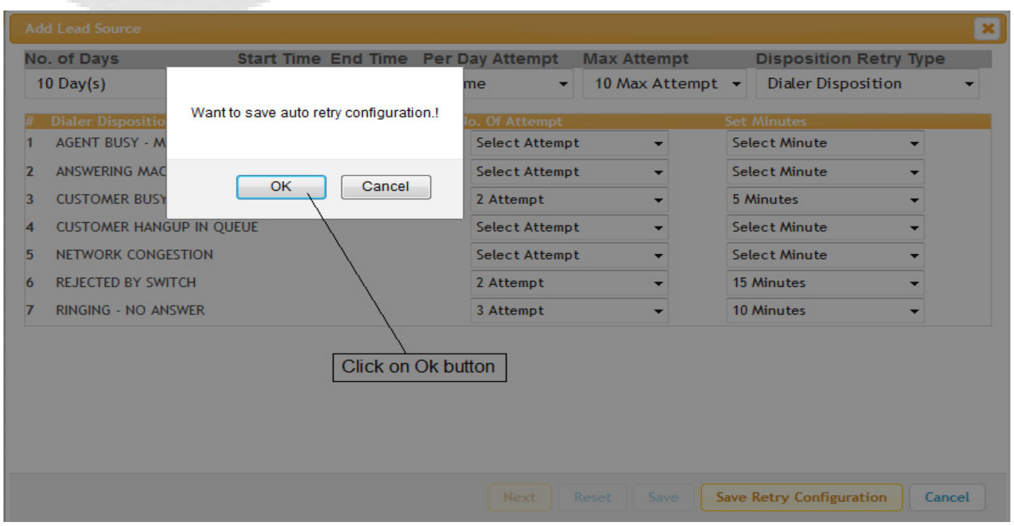
Step6: After selecting the disposition retry type then page appears as follows:



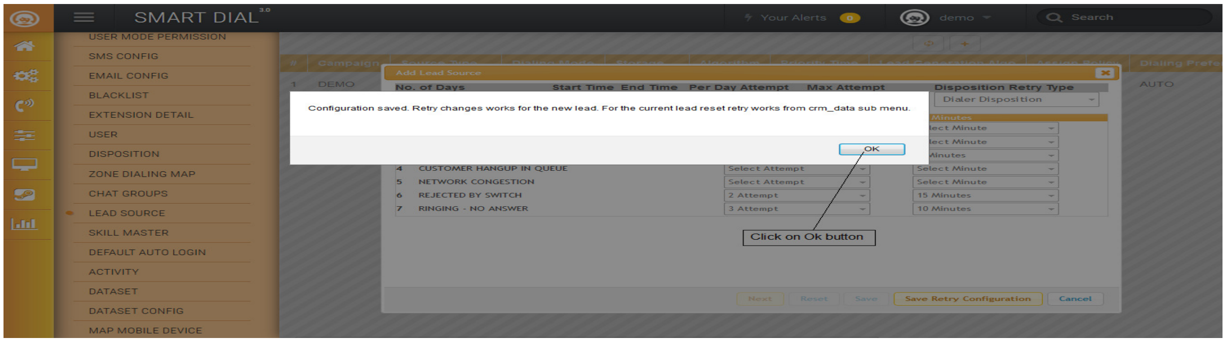
- Select number of attempt to set the respective disposition of retry
- Select the minutes to set retry time for respective disposition

Step7: Set the number of attempts and retry time as above

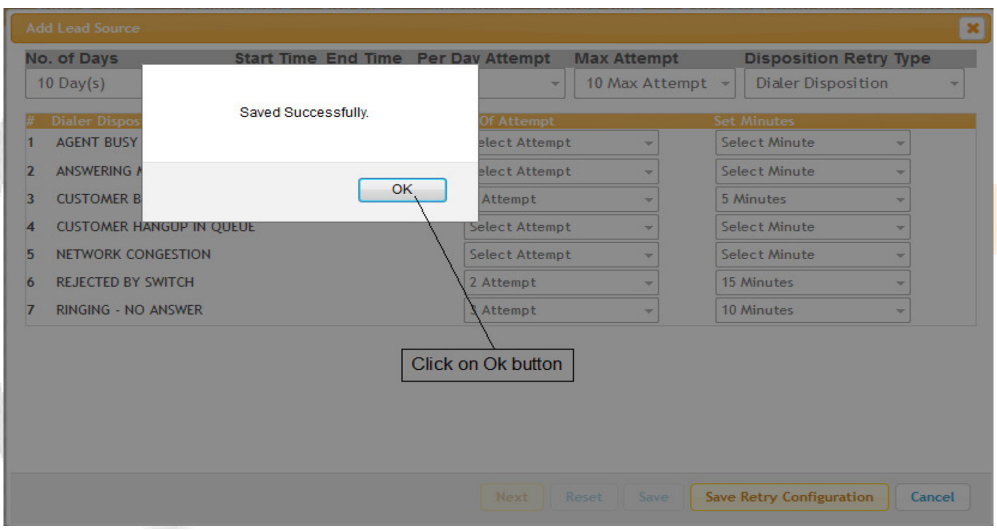
Step8: After click on "Save Retry Configuration" button then a popup message shows as "Want to save auto retry configuration!" with Ok and Cancel button.



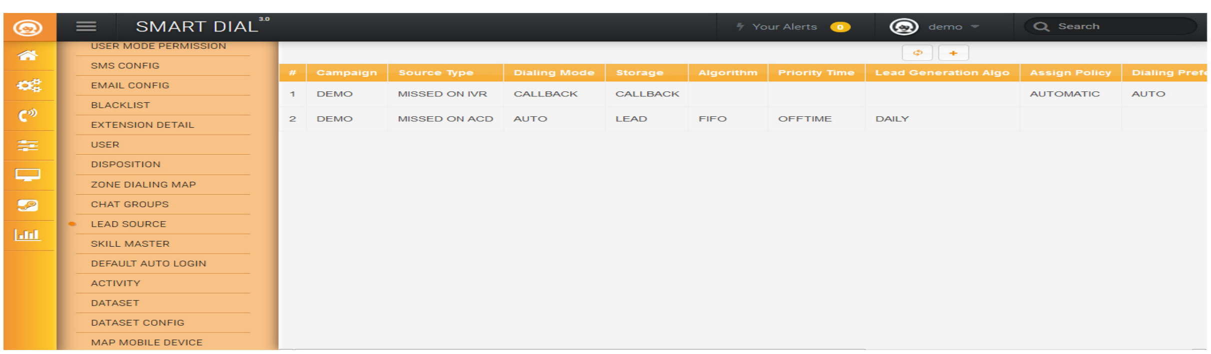
Step9: As we click on Ok button then a popup message shows as follows:



Step10: After that as we click on Ok button, then message shows as “Saved Successfully”.



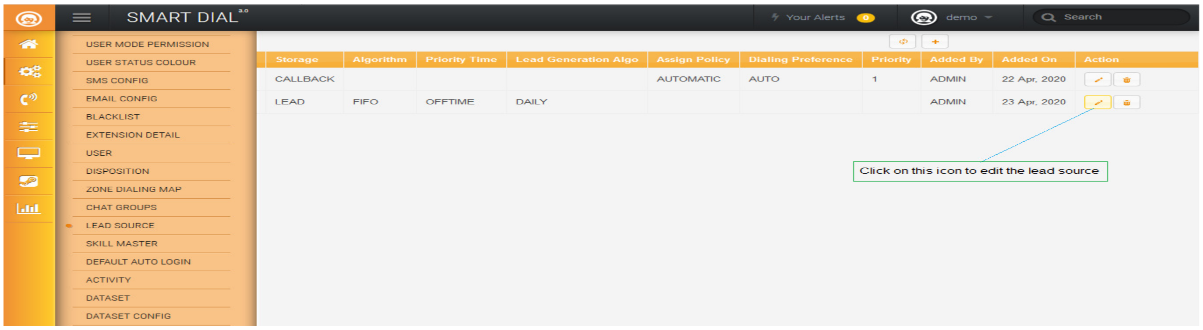
Step11: At last click on Ok button to close the Retry configuration page and view the home page for lead source as follows:



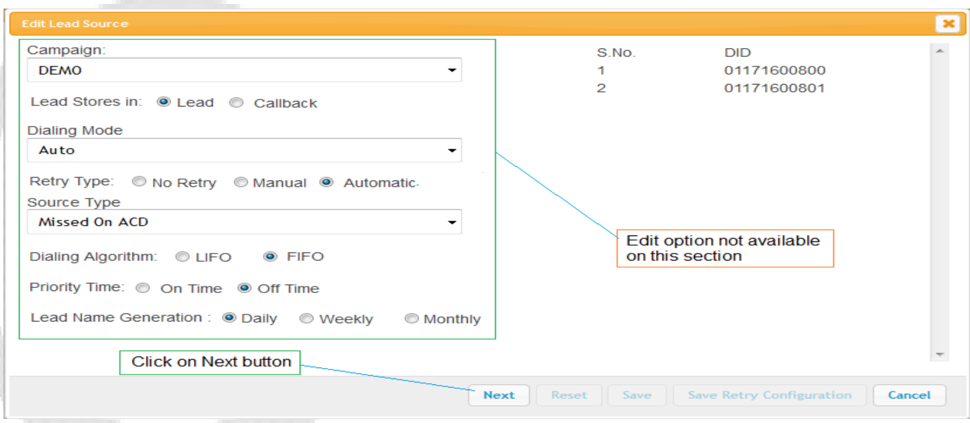
Edit Lead Source (Lead)

Step1: Consider the steps as above for opening Lead Source page

Step2: When Lead source page appears, then click on edit icon to open the edit lead source page

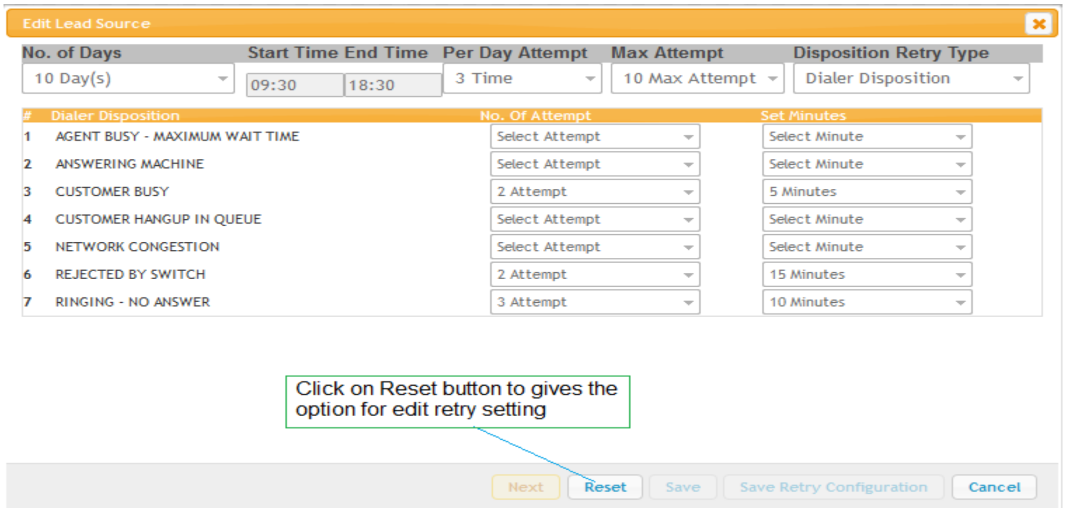


Step3: Edit lead source page appears as follows:



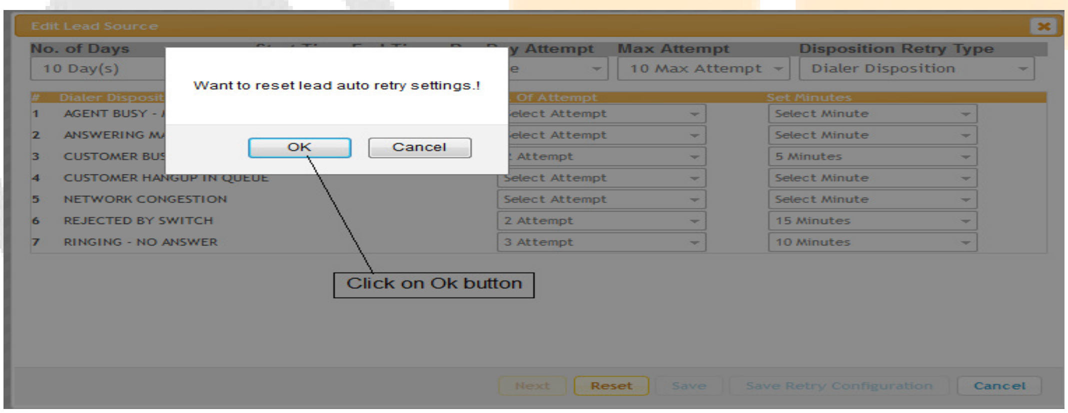
- ➢ Edit option not available in this page

Step4: After clicking on Next button, edit lead source page appears as follows:

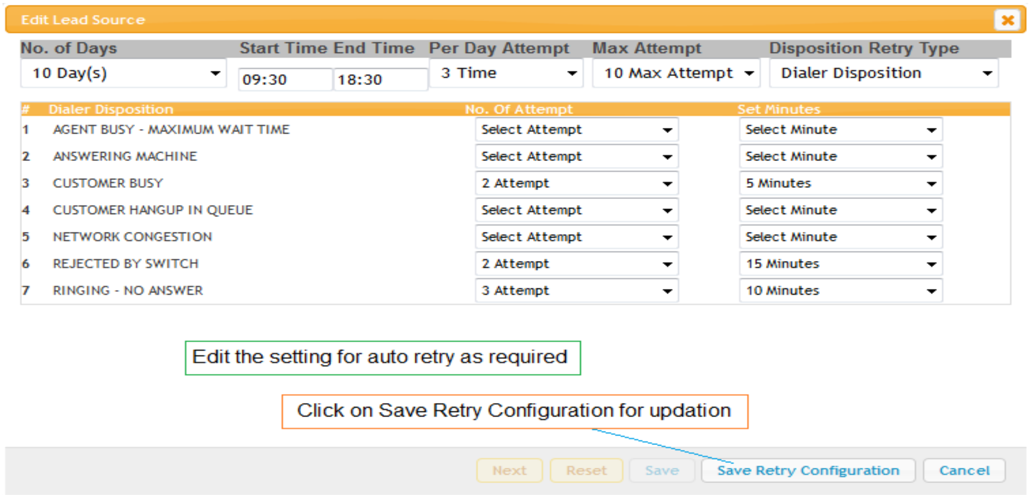


Step5: Click on “Reset” button to gives the option for edition

Step6: After click on Reset button, a popup dialog box open as ”Want to reset lead auto retry setting.!” With the option Ok and Cancel button

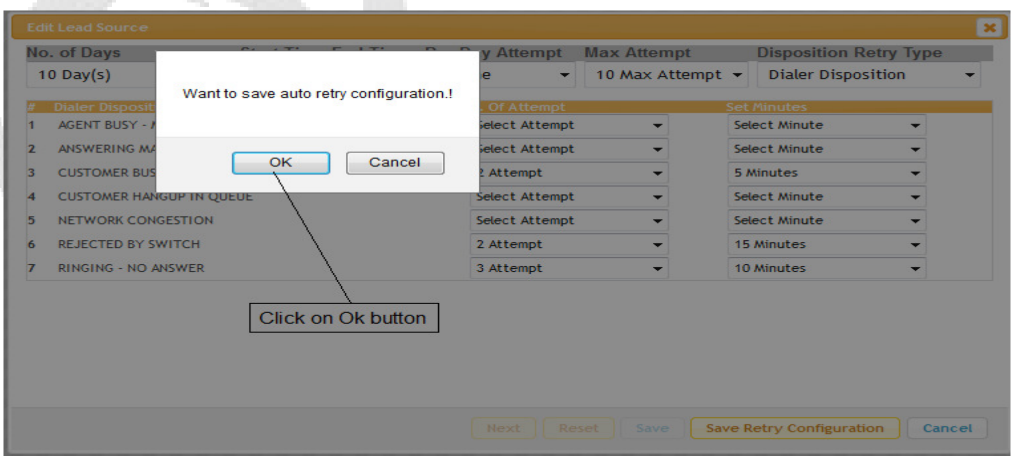


Step7: Then click on Ok button

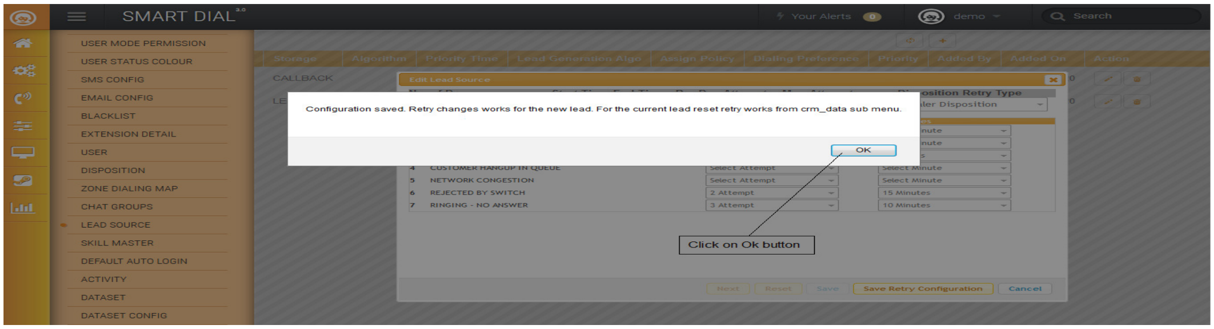


Step8: Now change the setting as required, then click on "Save Retry Configuration" button

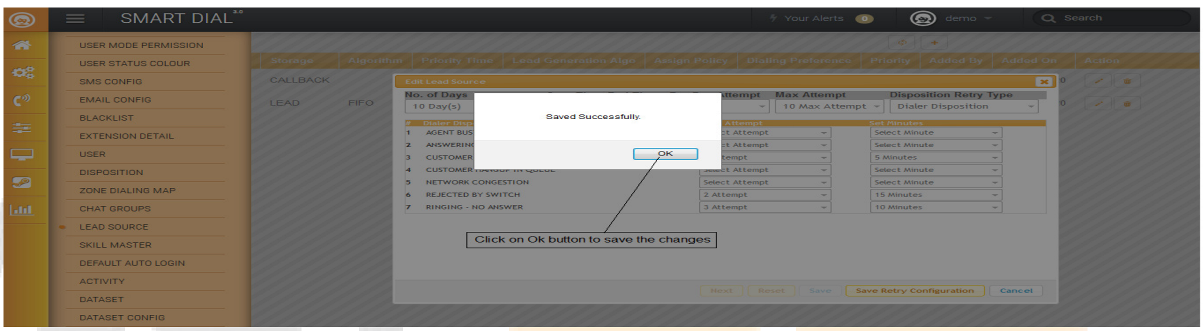
Step9: After click on "Save Retry Configuration" button then a popup message shows as "Want to save auto retry configuration!" with Ok and Cancel button.



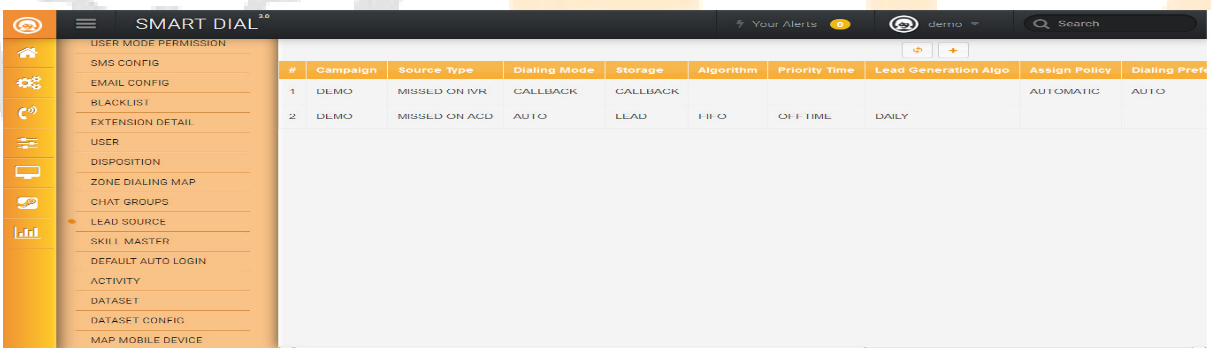
Step10: As we click on Ok button then a popup message shows as follows:



Step11: After that as we click on Ok button, then message shows as “Saved Successfully”.



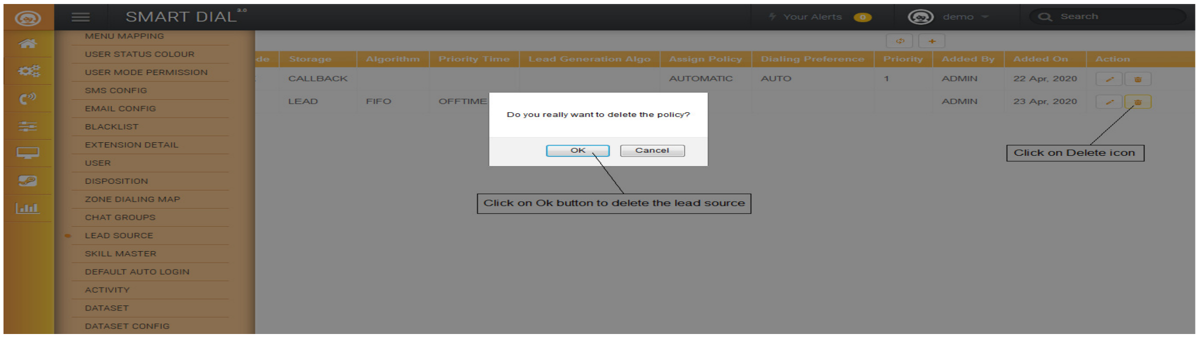
Step12: At last click on Ok button to close the Retry configuration page and view the home page for lead source as follows:



Delete Lead Source (Lead)

Step1: Consider the steps as above for opening Lead Source page

Step2: When Lead source page appears, Click on Delete icon to delete the lead source



Step3: After clicking the delete icon, a popup message asking a confirmation for delete

Step4: Now click on the “Ok” button, which will result removal of that lead source policy.

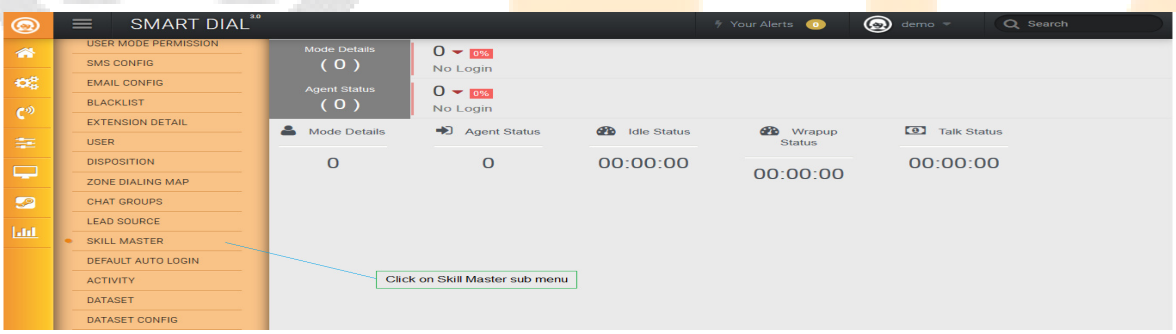
2.1.a.19 Skill Master

This mechanism is used to create and delete skill.

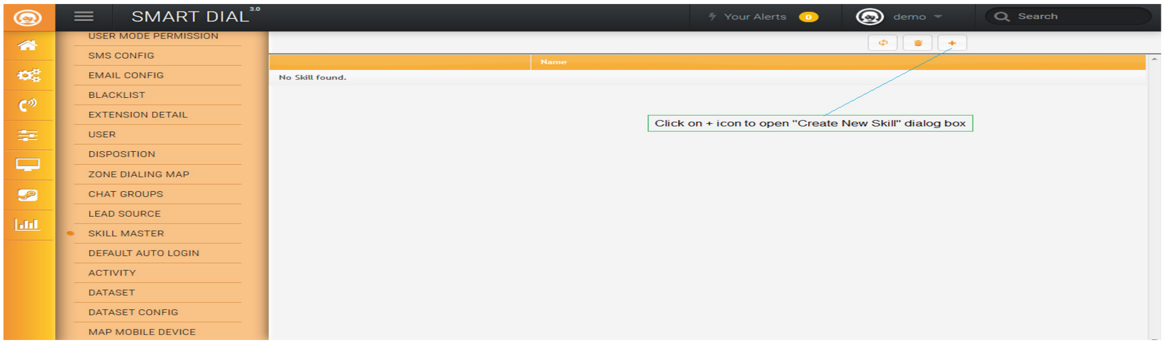
Further this skill is map to campaign and user through the Mapping sub-sub menu.

<u>Add New Skill:</u>

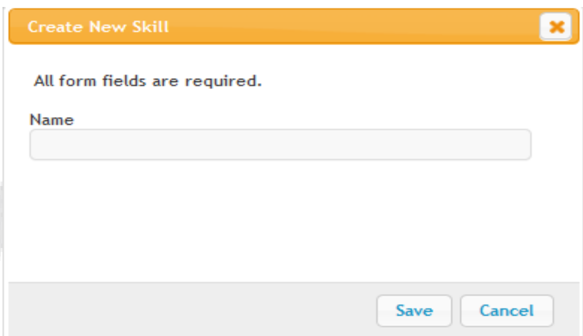
Step1: Go to system configuration menu, Click on “Skill Master” sub menu to enable appearance of Skill Master page



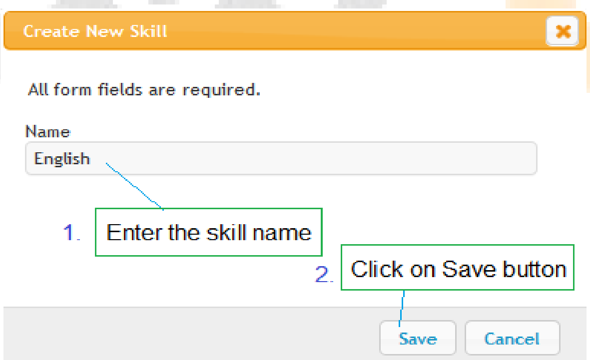
Step2: When Skill Master page shows then click on + icon to open “Create New Skill” dialog box



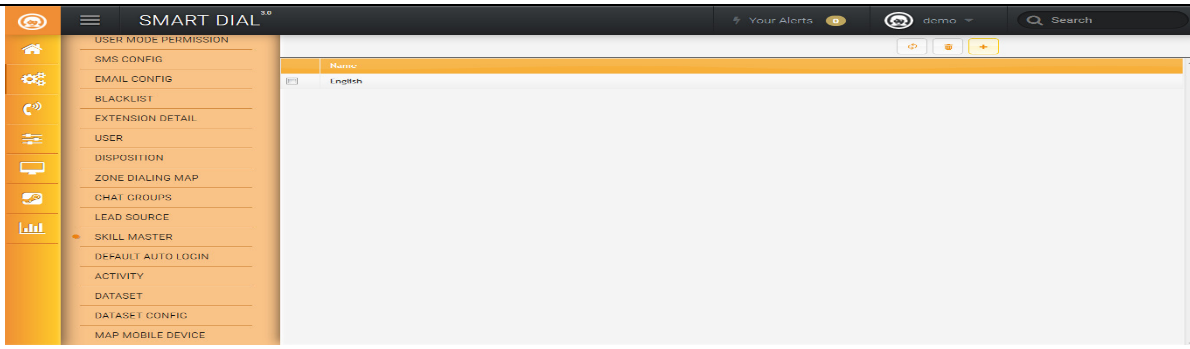
Step3: Create New Skill dialog box shows as follows:



Step4: Enter the skill name in name textbox then click on save button



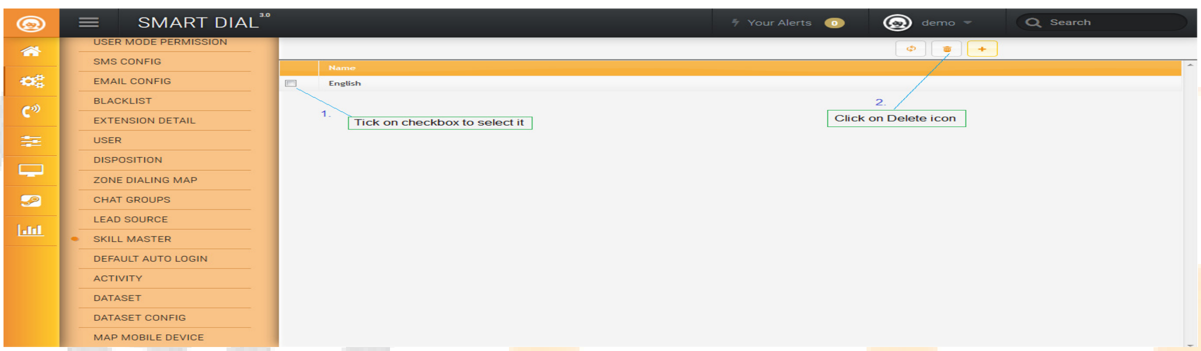
Step5: After click on save button then created skill shows on skill page



Delete Skill:

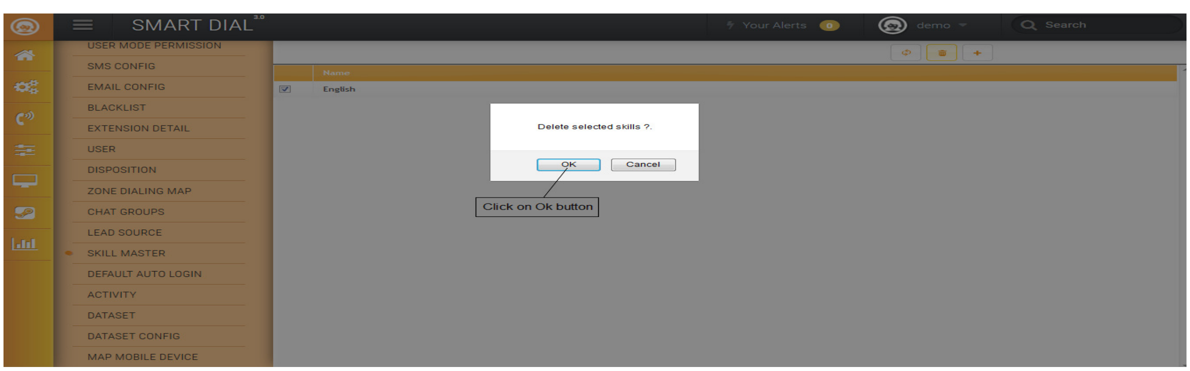
Step1: Consider the steps as above for opening skill page

Step2: When skill page appears, tick on checkbox to select it



Step3: Then click on Delete icon to delete the selected skill

Step4: After clicking the delete icon, a popup message asking a confirmation for delete



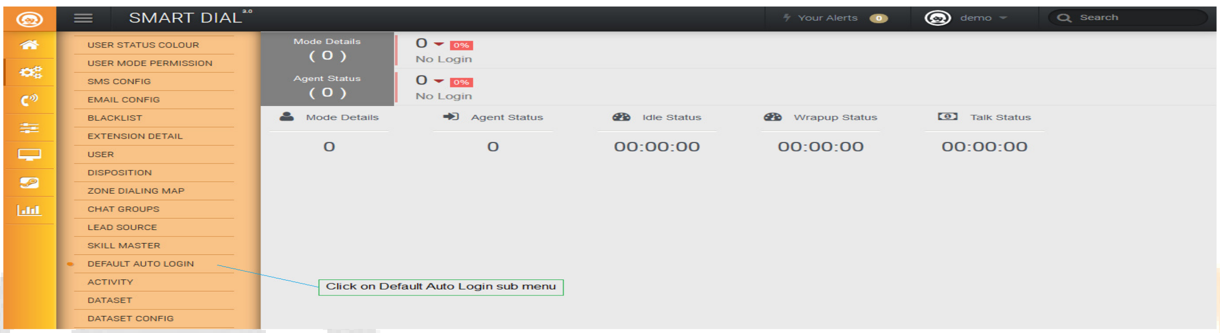
Step5: Now click on the “Ok” button, which will result removal of that data.

2.1.a.20 Default Auto Login

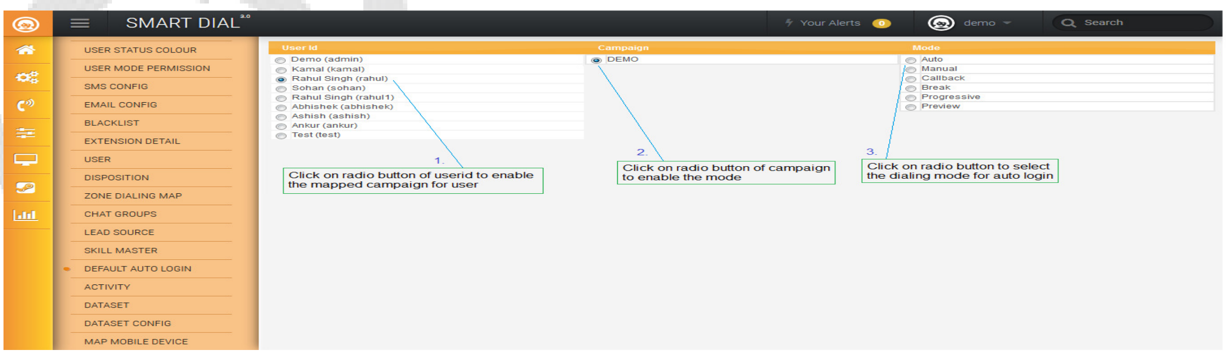
This mechanism is used to map the user to campaign and dialing mode for auto login after entering userid and password in agent application.

Provide Auto Login permission to User

Step1: Go to system configuration menu, Click on “Default Auto Login” sub menu to enable appearance of Default Auto Login page



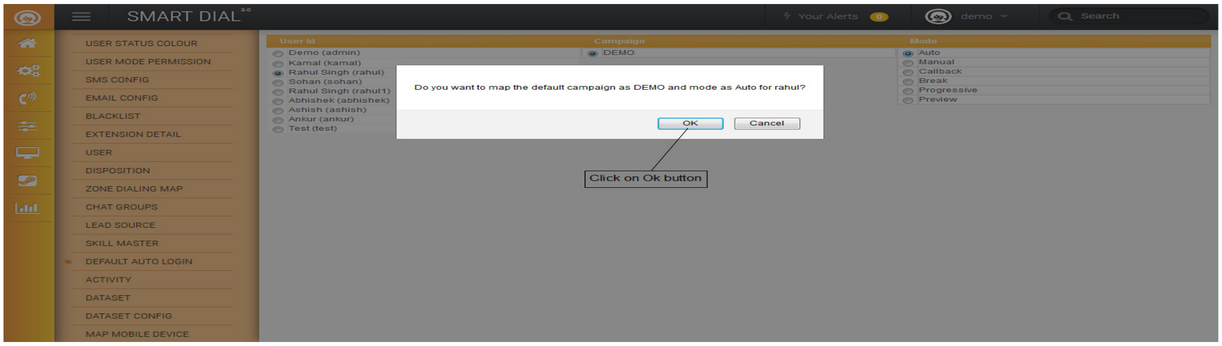
Step2: When Default auto login page appears, click on radio button of userid to enable the mapped campaign for user



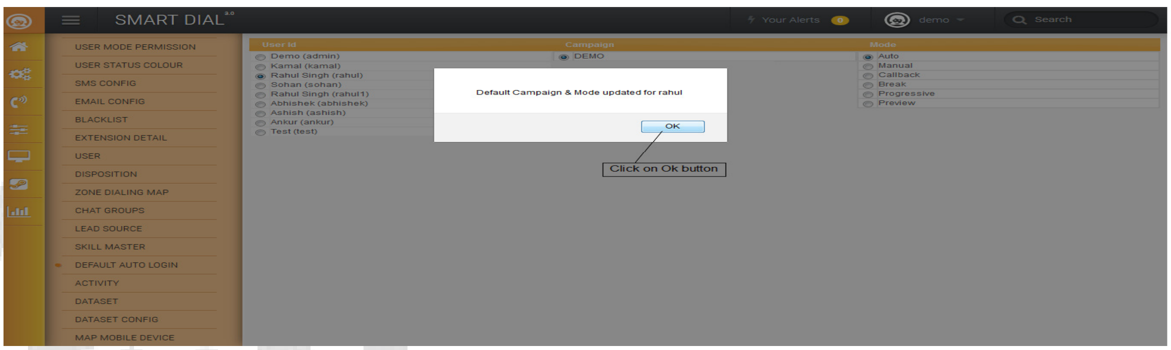
Step3: After that click on radio button of campaign to enable the mode

Step4: Then click on radio button of any mode which you want to mapped with the user

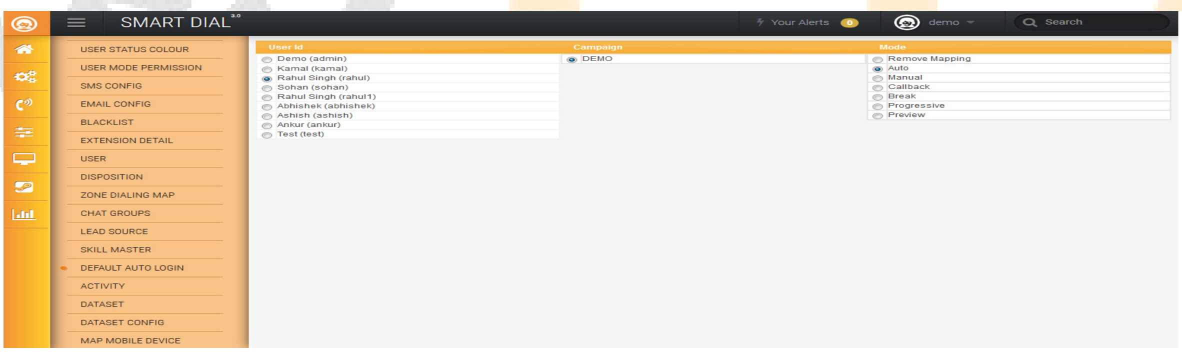
Step5: When mode mapped then a popup message appears as “Do you want to map the default campaign as XXXXX and mode as XXXXX for XXXXX?



Step6: As we click on Ok button, a new popup message shows as "Default Campaign & Mode updated for XXXX (userid)"

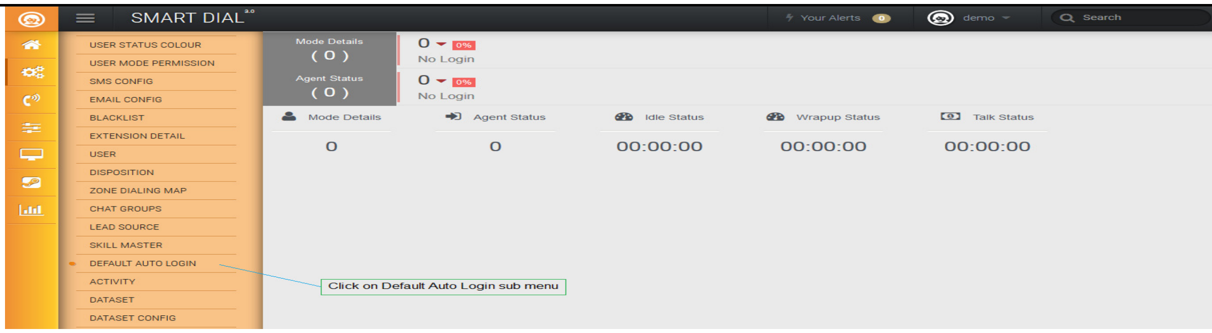


Step7: After clicking on Ok button, Default Auto Login page appears as follows:

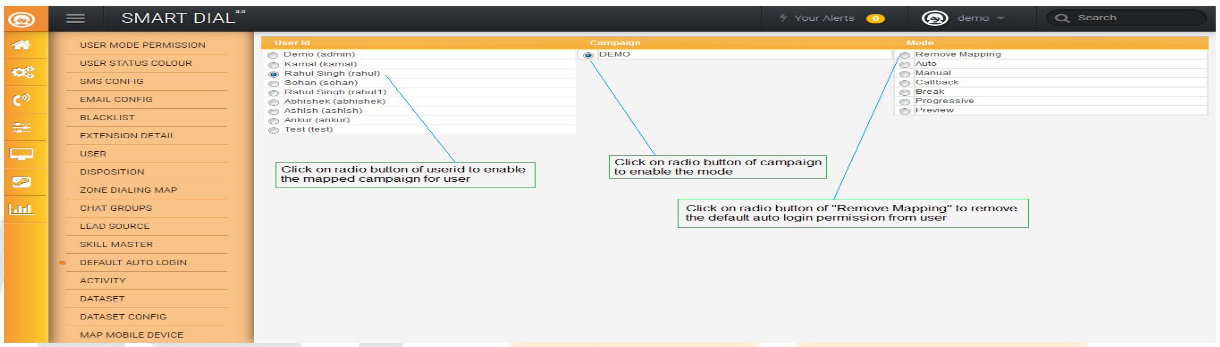


<u>Remove Auto Login permission from User</u>

Step1: Go to system configuration menu, Click on "Default Auto Login" sub menu to enable appearance of Default Auto Login page



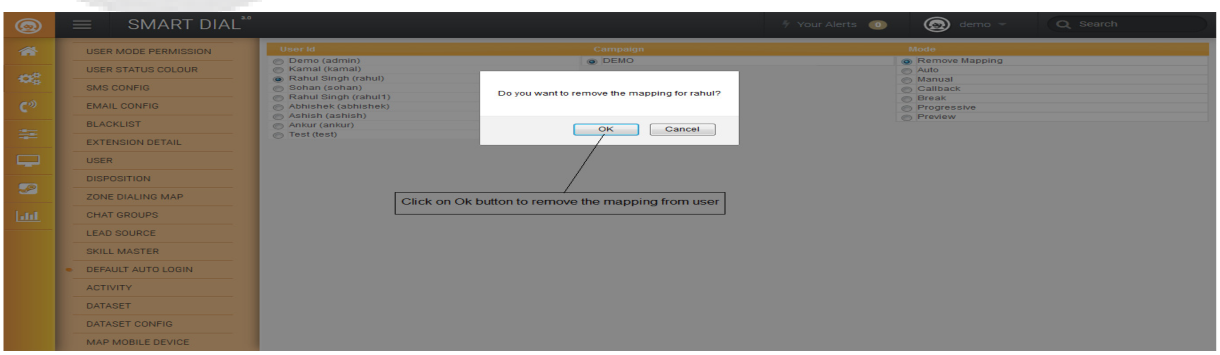
Step2: When Default auto login page appears, click on radio button of userid to enable the mapped campaign for user



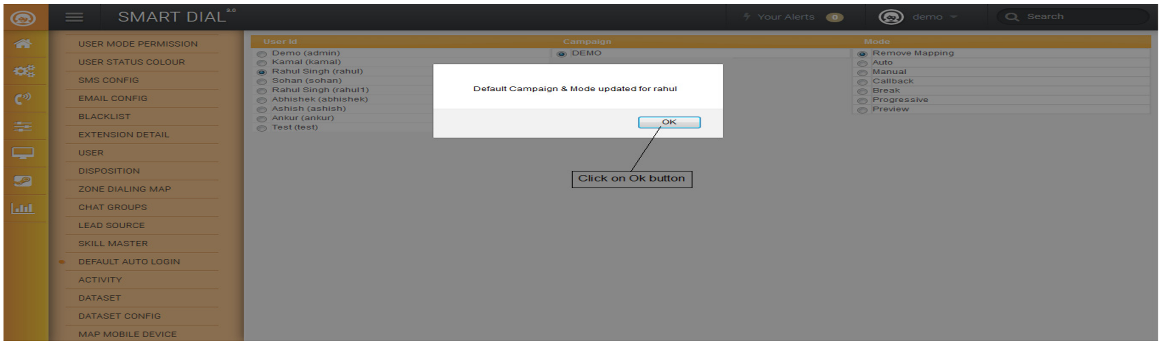
Step3: After that click on radio button of campaign to enable the mode

Step4: Then click on radio button of "Remove Mapping" to remove the permission from user

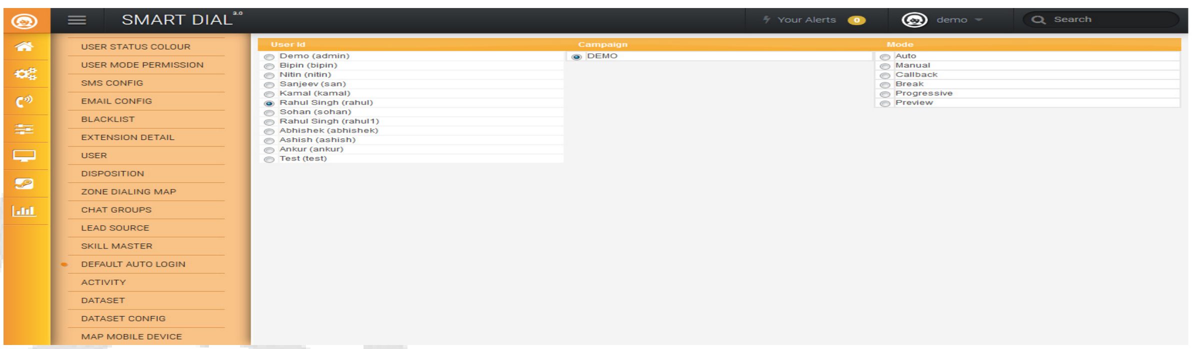
Step5: After mode unmapped, a pop up message shows as "Do you want to remove the mapping for XXXX?" with Ok and Cancel button.



Step6: As we click on Ok button, a new popup message shows as "Default Campaign & Mode updated for XXXX (userid)"



Step7: After clicking on Ok button, Default Auto Login permission removed from the user and page appears as follows:



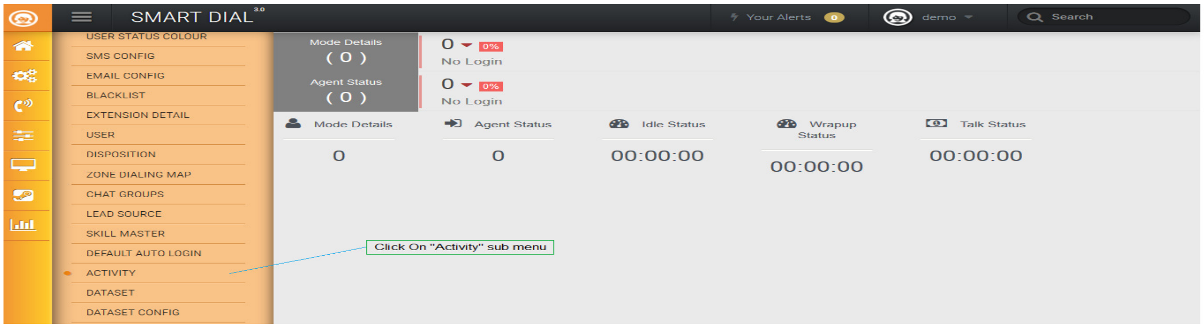
2.1.a.21 Activity

This mechanism is used to create and delete activity.

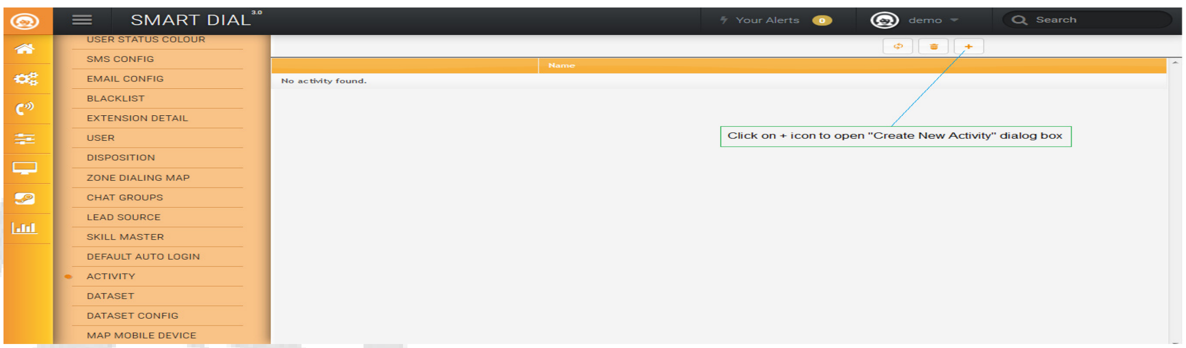
Further this activity is map to campaign and user through Mapping sub menu.

<u>Add New Activity:</u>

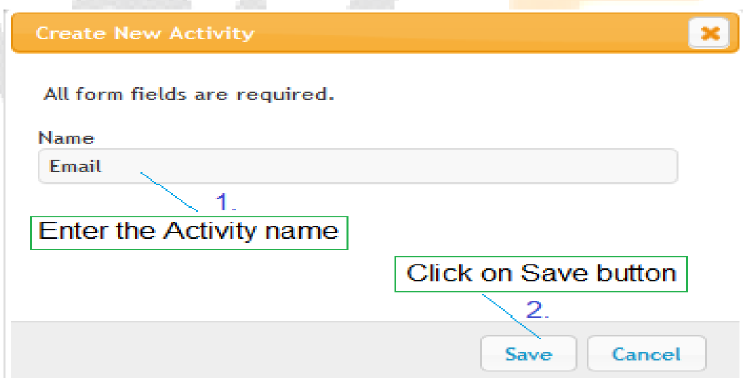
Step1: Go to system configuration menu, Click on “Activity” sub menu to enable appearance of Activity page



Step2: When Activity page appears then click on + icon to open “Create New Activity” dialog box

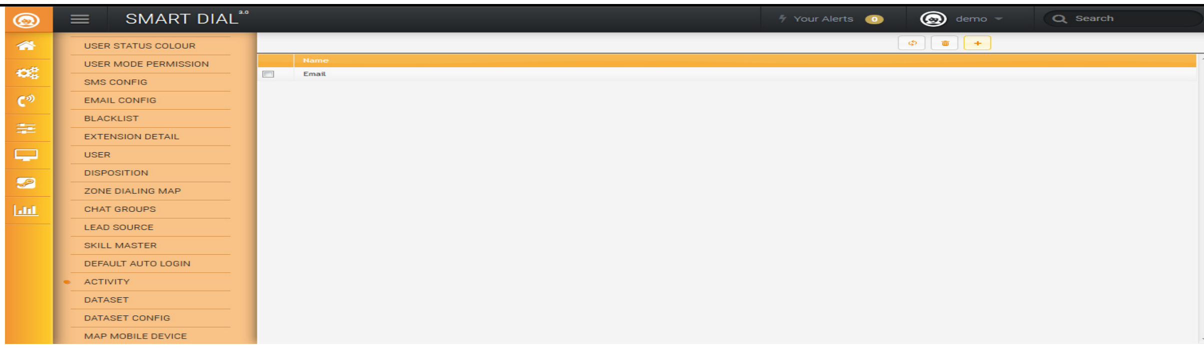


Step3: Create New Activity dialog box shows as follows:



Step4: Enter the Activity name in name textbox then click on save button

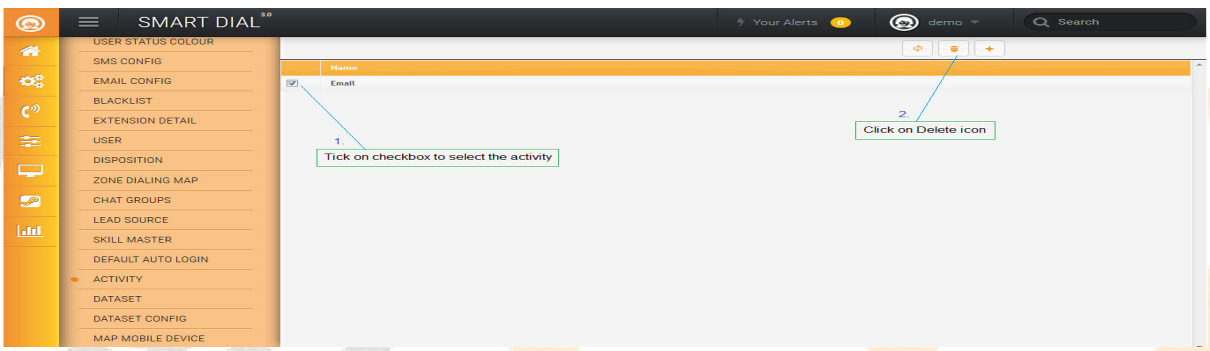
Step5: After click on save button then created activity shows on activity page



Delete Activity:

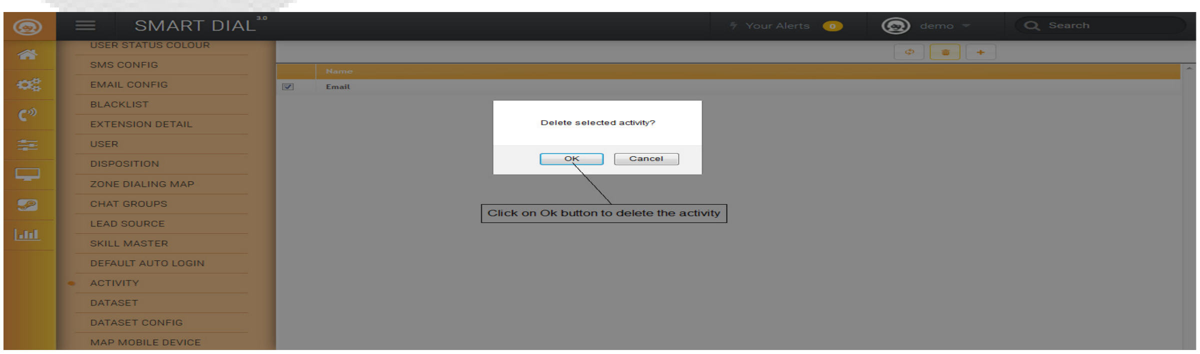
Step1: Consider the steps as above for opening Activity page

Step2: When Activity page appears, tick on checkbox to select it



Step3: Then click on Delete icon to delete the selected activity

Step4: After clicking the delete icon, a popup message asking a confirmation for delete:



Step5: Now click on the “Ok” button, which will result removal of that data from the system.

2.1.a.22 Dataset

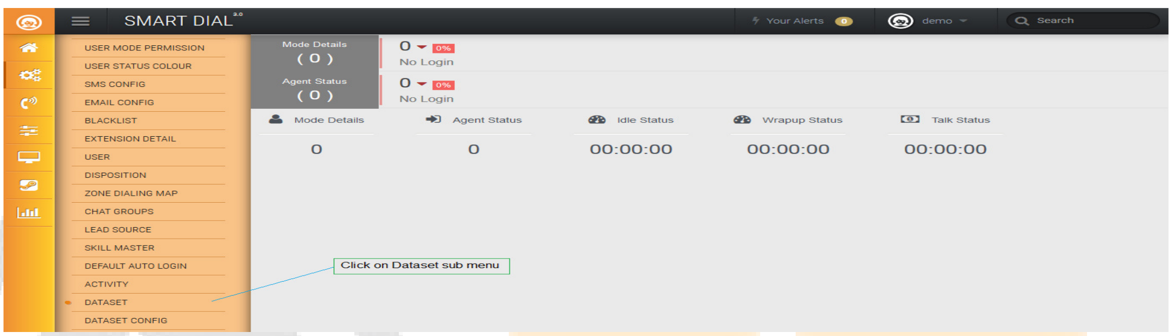
This mechanism is used to create and delete a dataset.

Dataset which created from the Dataset page that will use in Dataset Config, Campaign and CRM configuration sub menu.

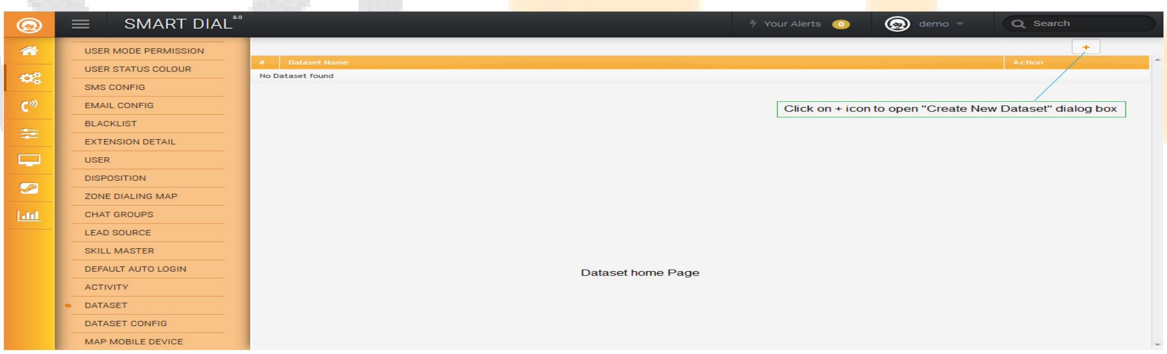
Dataset will be usable where same records required in multiple campaigns.

<u>Add New Dataset:</u>

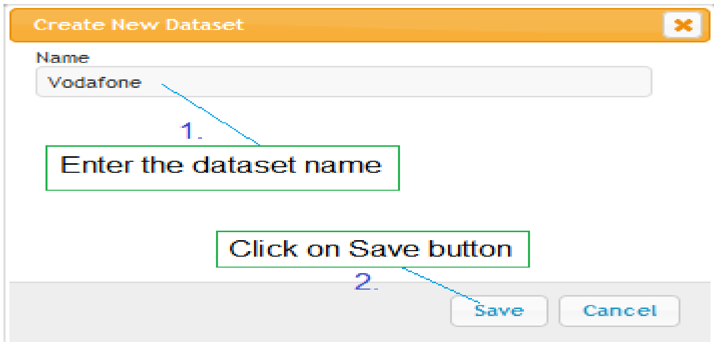
Step1: Go to system configuration menu, Click on "Dataset" sub menu to enable appearance of Dataset page



Step2: When Dataset page appears then click on + icon to open "Create New Dataset" dialog box



Step3: Create New Dataset dialog box shows as follows:



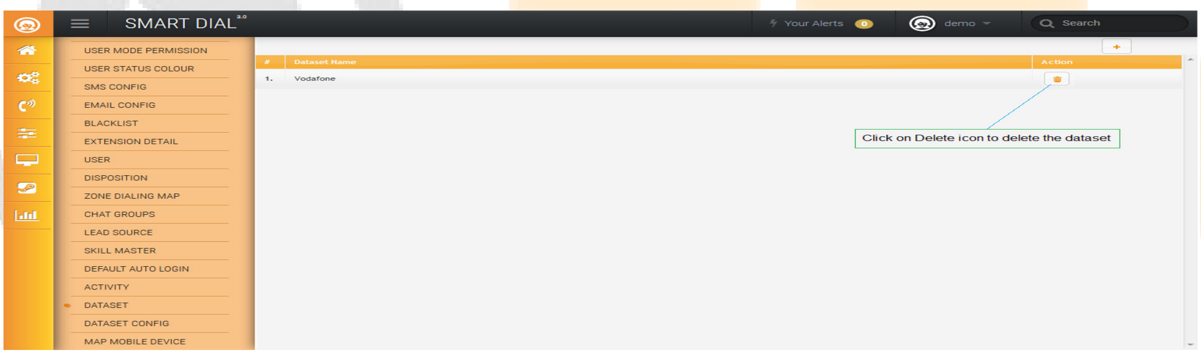
Step4: Enter the dataset name in name textbox then click on save button

Step5: After click on save button then created dataset shows on dataset page

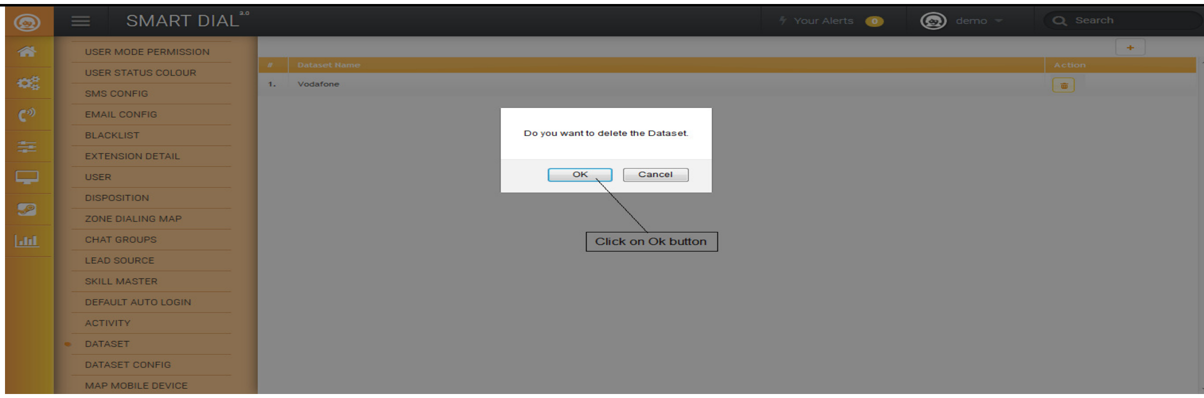
Delete Dataset:

Step1: Consider the steps as above for opening Dataset page

Step2: When Dataset page appears, click on delete icon to delete the dataset



Step3: After clicking the delete icon, a popup message asking a confirmation for delete



Step4: Now click on the “Ok” button, which will result removal of that data from the system.

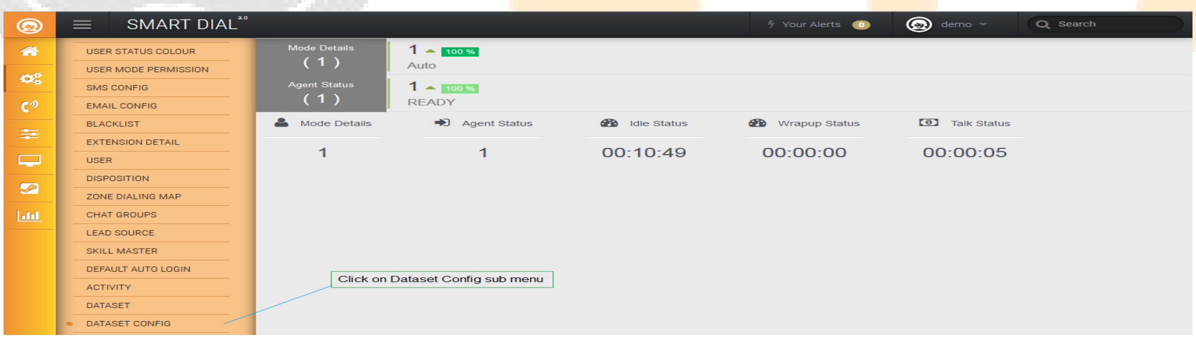
2.1.a.23 Dataset Config

This mechanism is used to create the field for dataset.

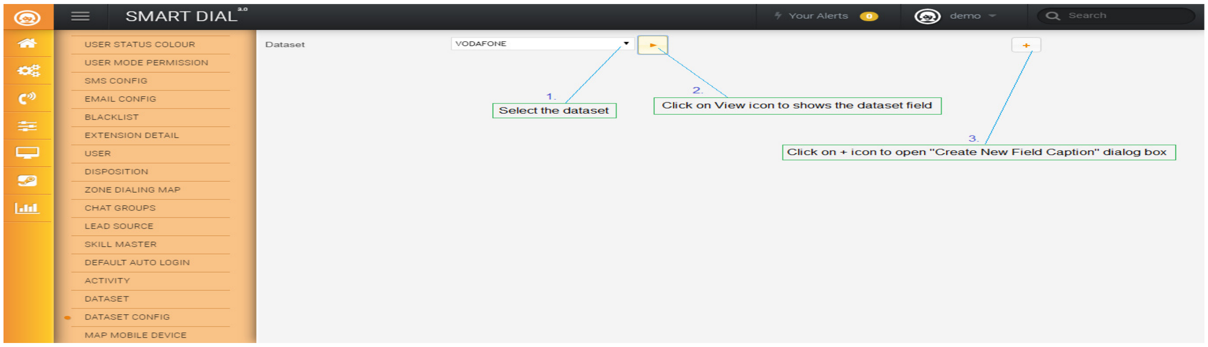
Dataset field which created from this page will be used for mapping the dataset fields to dataset campaign through the CRM Configuration sub-sub menu.

Add field to the Dataset:

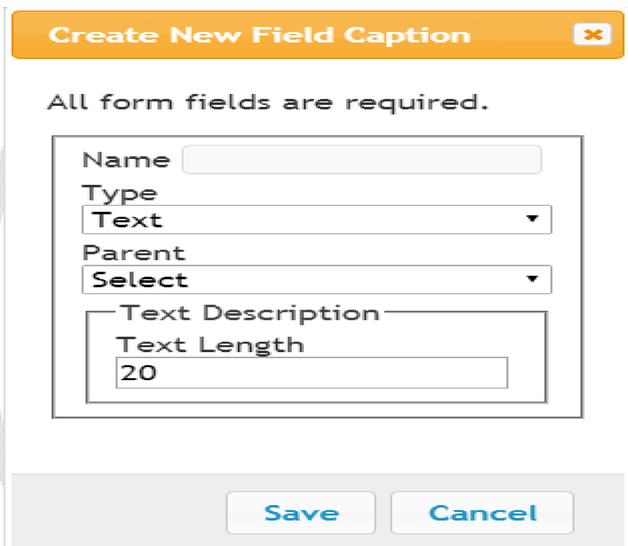
Step1: Go to system configuration menu, Click on “Dataset Config” sub menu to enable appearance of Dataset Config page



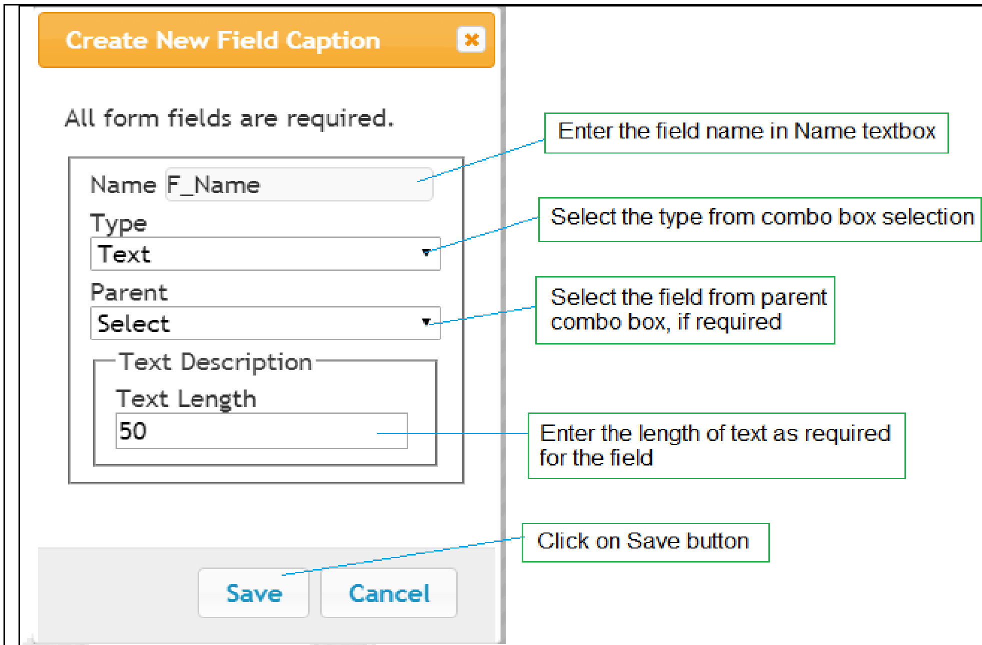
Step2: When Dataset Config page appears then select the dataset name and click on view icon to display the created fields for dataset



Step3: After that click on '+' icon to open the "Create New Field Caption" dialog box as follows:



Step4: Fill the appropriate data as shown in below picture

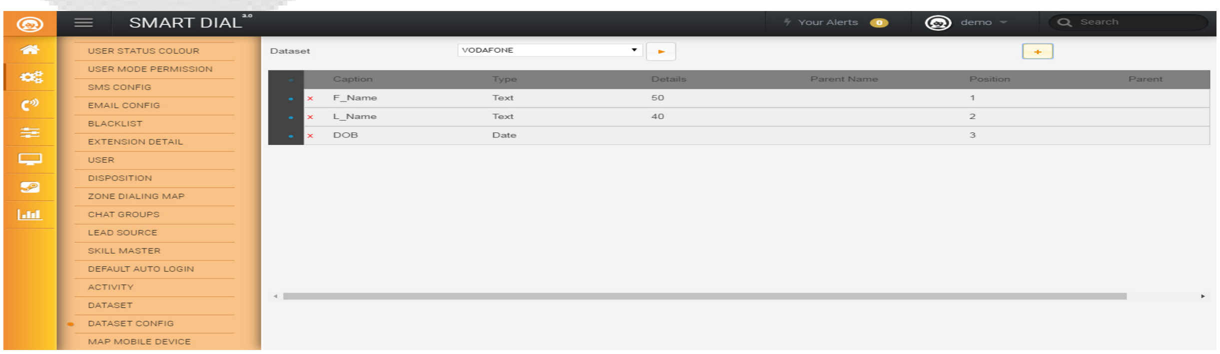


Step5: At last click on Save button to save the dataset fields.

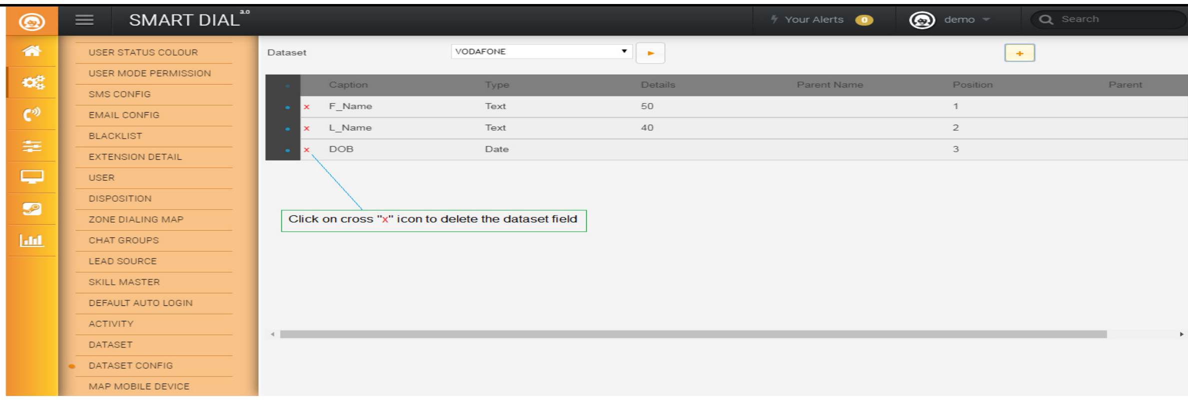
Delete field from the Dataset:

Step1: Consider the steps as above for opening Dataset Config page

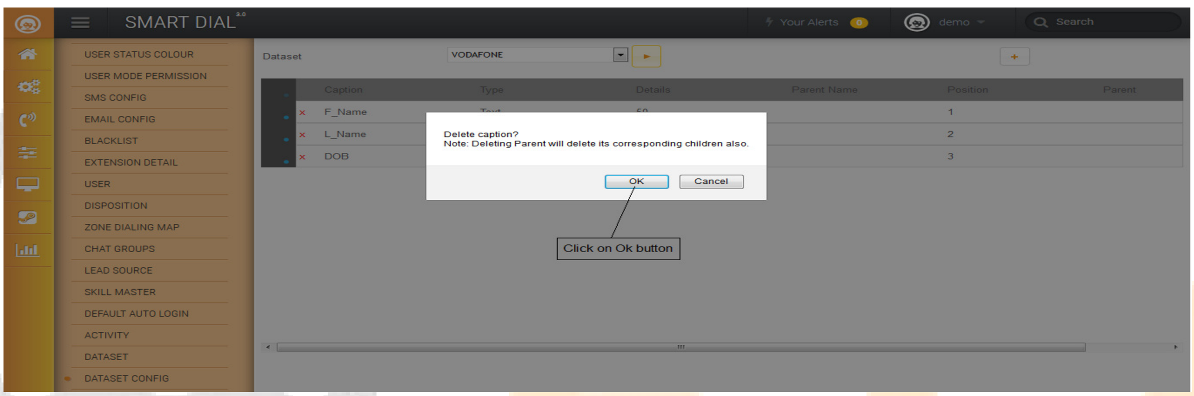
Step2: When Dataset Config page appears then select the dataset name and click on view icon to display the created fields for dataset



Step3: When Dataset page appears, click on cross "X" icon for dataset field deletion as shown in picture



Step4: After clicking the delete icon, a popup message asking a confirmation for delete



Step5: Now click on the “Ok” button, which will result removal of that field from the dataset.

Telephony Configuration

This module facilitates settings and modifications pertaining to telephony.

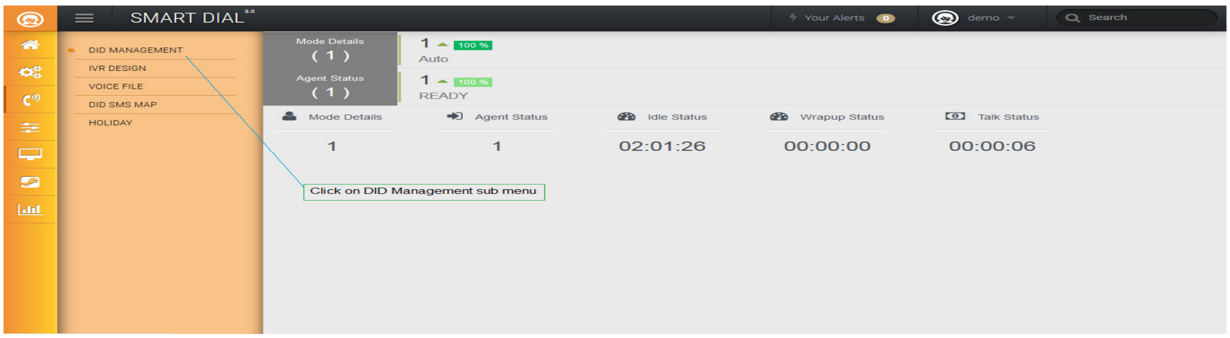
Sub modules are DID Management, IVR Design, Voice File, DID SMS Map and Holiday.

2.1.a.24 DID Management

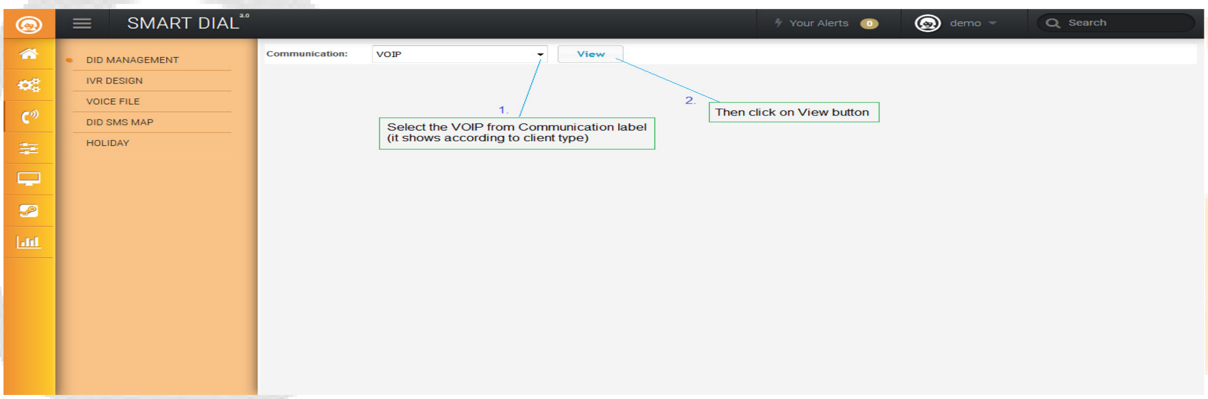
This mechanism facilitates settings and modifications of assigning DID with campaigns, agent, and so on.

Schedule DID

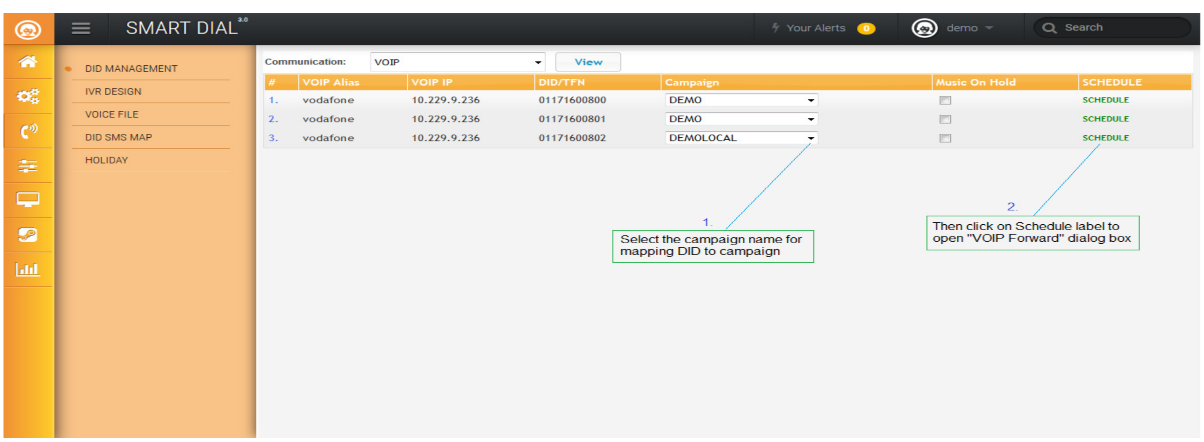
Step1: Go to Telephony configuration menu, Click on “DID Management” sub menu to enable appearance of DID Management page



Step2: Select the VOIP from Communication label, then click on View button as shown in below picture

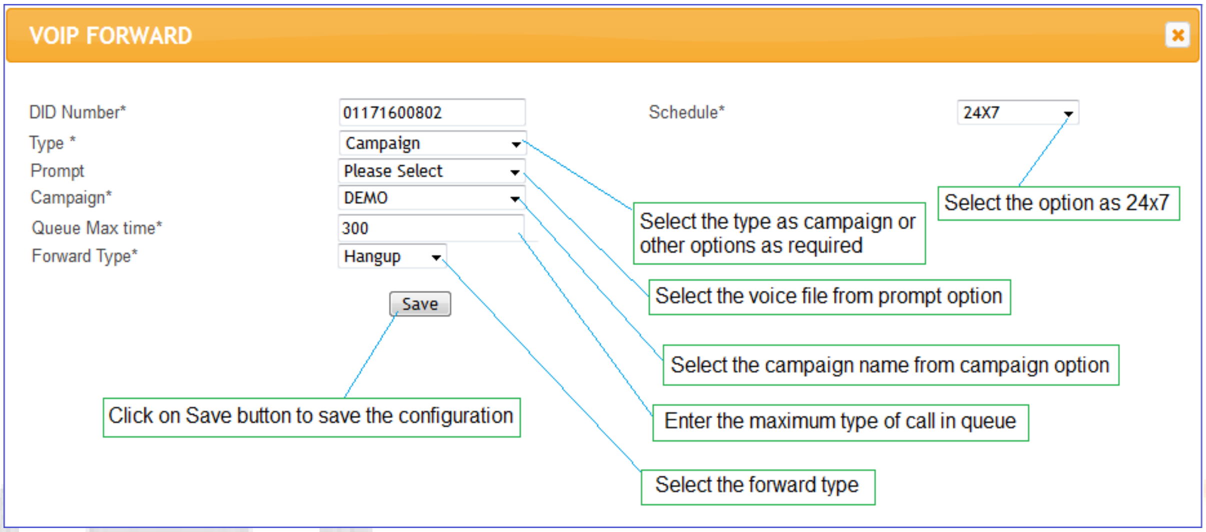


Step3: After clicking on View button, DID shows on DID Management Page



Step4: Then map the DID to campaign and click on Schedule label

Step5: After clicking on Schedule label, a dialog box named "VOIP FORWARD" will appear



Step6: Fill up the appropriate setting for the DID as shown in above picture

Step7: After clicking on Save button, a popup dialog box shows the success message

Step8: Click on Ok button to save the setting.

2.1.a.25 IVR Design

This mechanism enables end users to create and modify IVR that is used in DID Management for the 'Optional IVR' type.

The functionalities only follow GUI methodology makes easier to access.

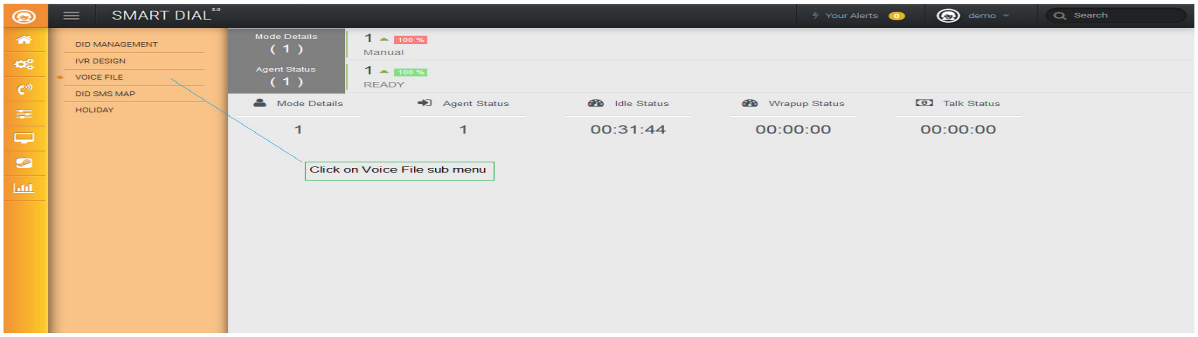
2.1.a.26 Voice File

This mechanism facilitates uploading of audio file that is applicable in DID Management and IVR Design.

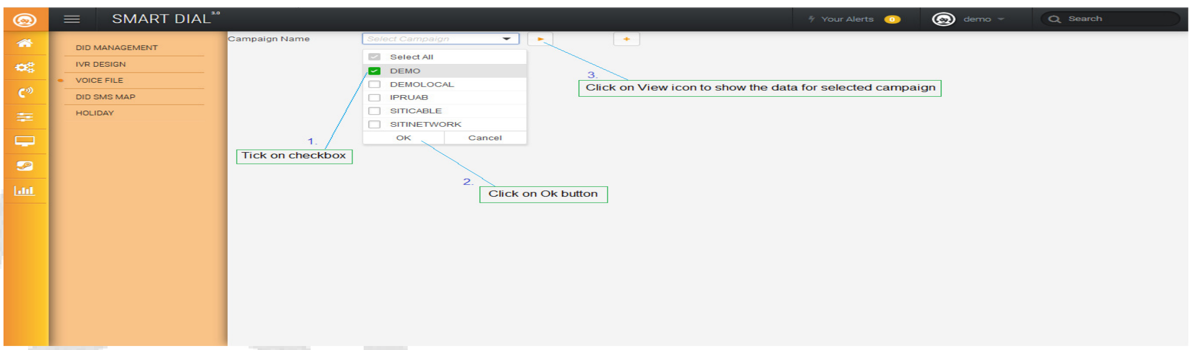
The illustration of usage of voice file are:

Add Voice File:

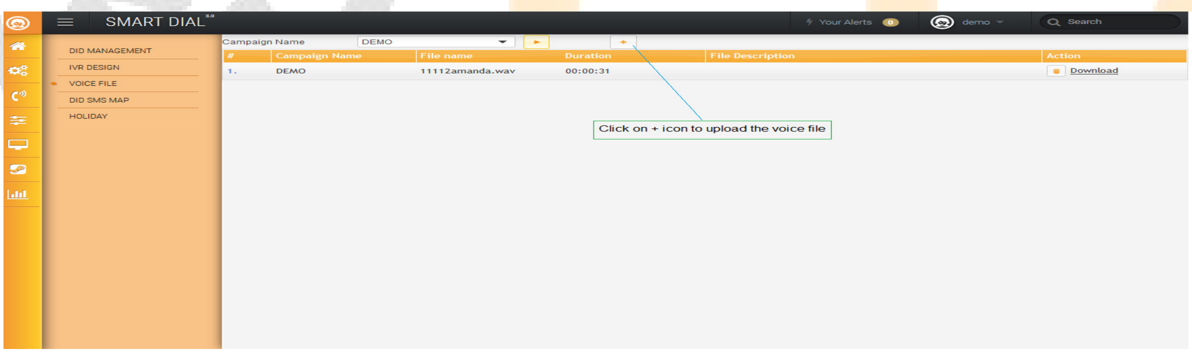
Step1: Go to Telephony configuration menu, Click on "Voice File" sub menu to enable appearance of Voice File page



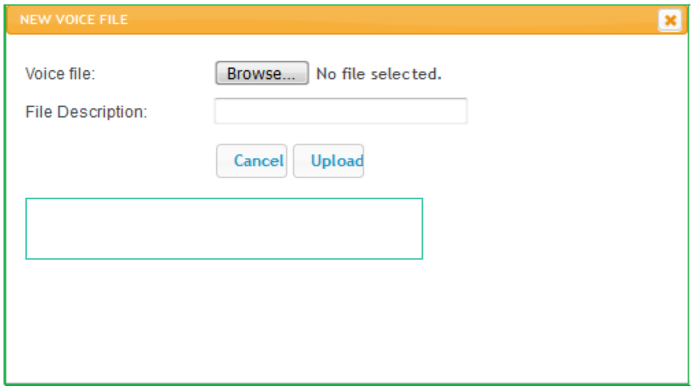
Step2: First tick the checkbox and click on OK button to select the campaign.



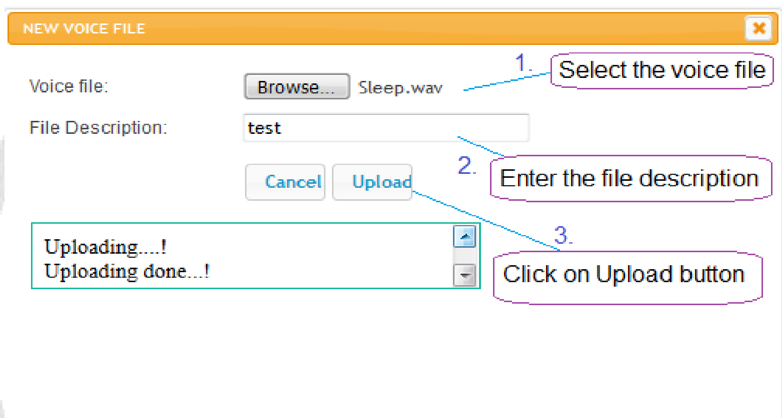
Step3: After clicking on View icon, Voice file shows as follows:



Step4: Then click on + icon to open the “New Voice File” dialog box as follows:

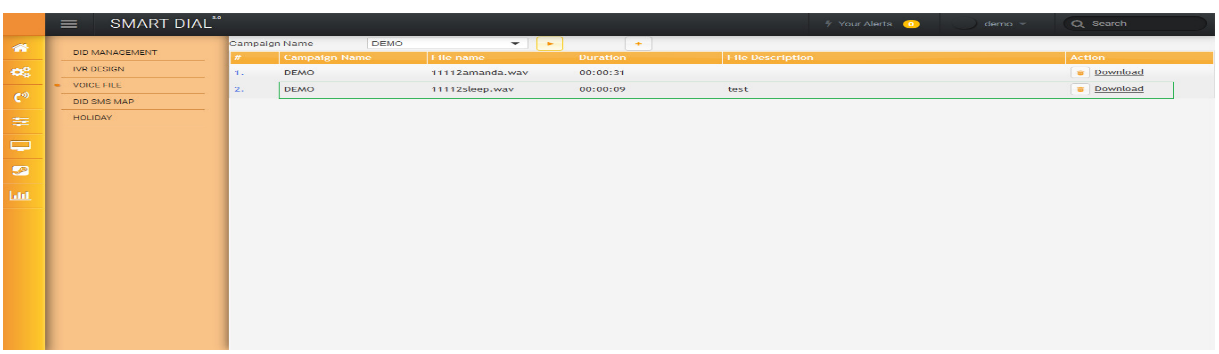


Step5: Select the voice file then enter the file description as shown in below picture



Step7: As we click on upload button, then it gives the response as "Uploading done…!" in dialog box

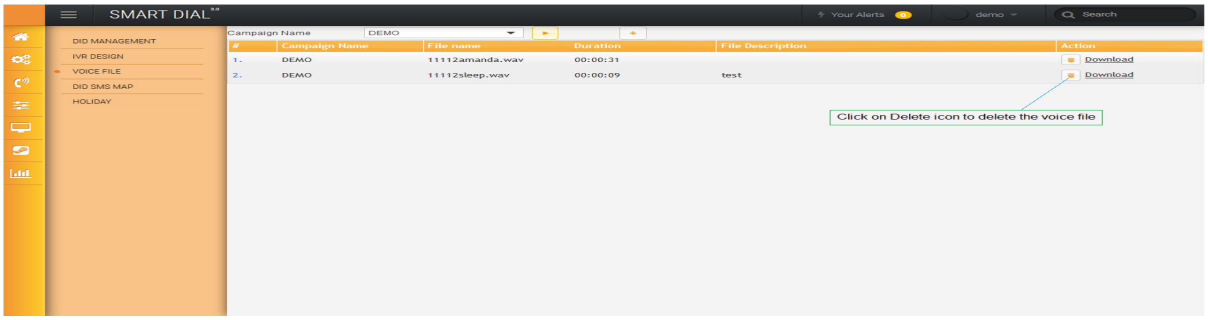
Step8: The recently uploaded file shown as follows:



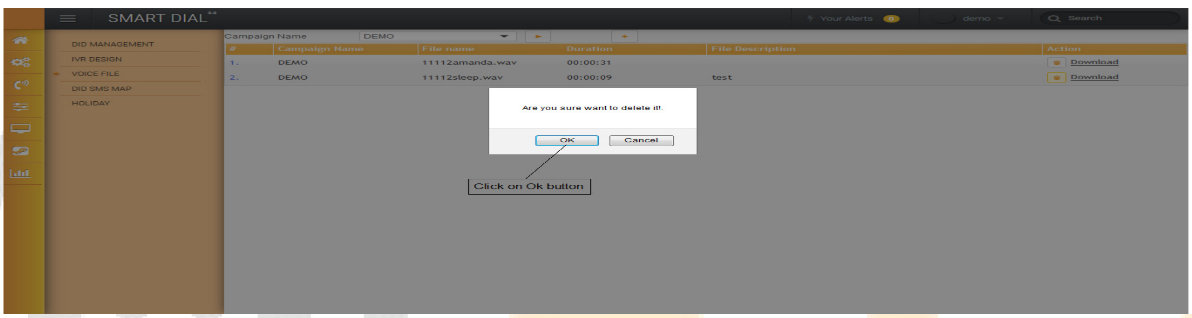
Delete Voice File:

Step1: Consider the steps as above for opening the voice file page

Step2: When voice file shows then click on Delete icon to delete the voice file



Step3: After clicking the delete icon, a popup message asking a confirmation for delete

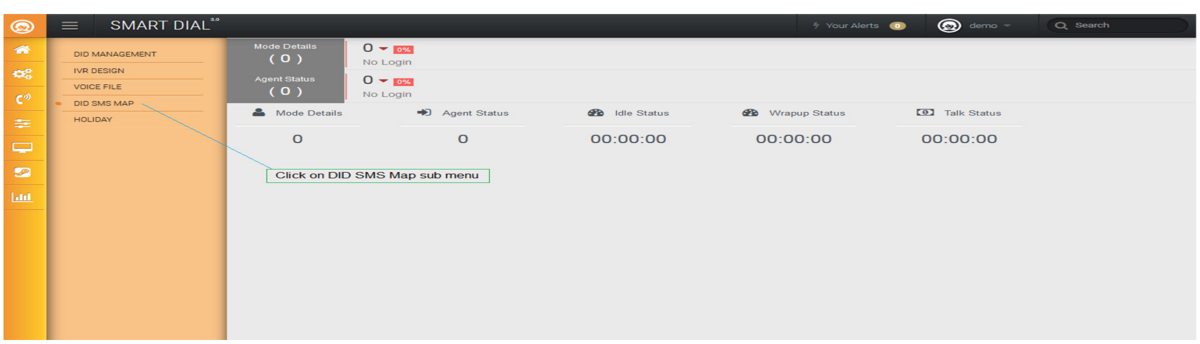


Step4: Now click on the “Ok” button, which will result removal of that data.

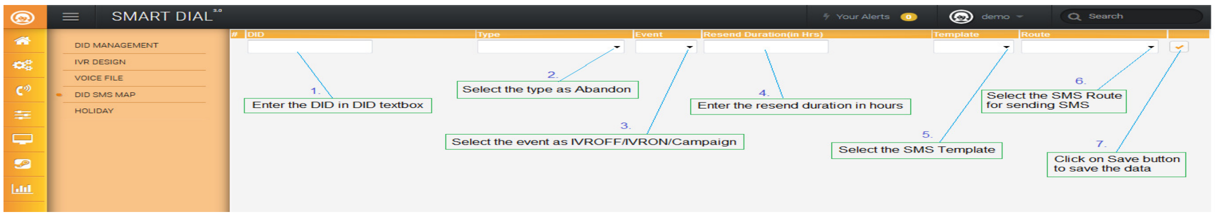
2.1.a.27 DID SMS Map

This mechanism facilitates user to send the SMS if call abandon on DID.

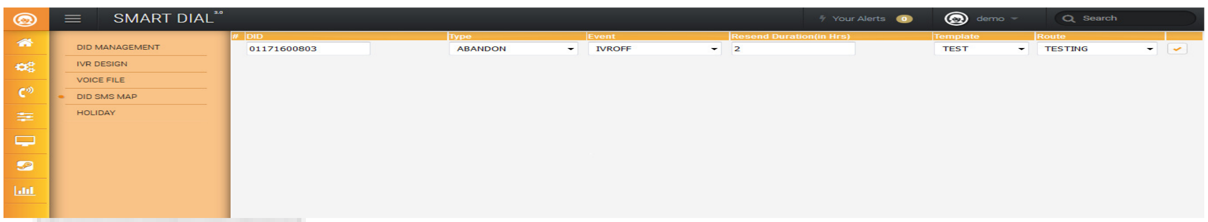
Step1: Go to Telephony configuration menu, Click on “DID SMS Map” sub menu to enable appearance of DID SMS Map page



Step2: DID SMS Map page appears as follows:



Step3: Then fill up the appropriate data as shown in picture



Step4: At last click on Save button to Map the DID with SMS template, type and event.

2.1.a.28 Holiday

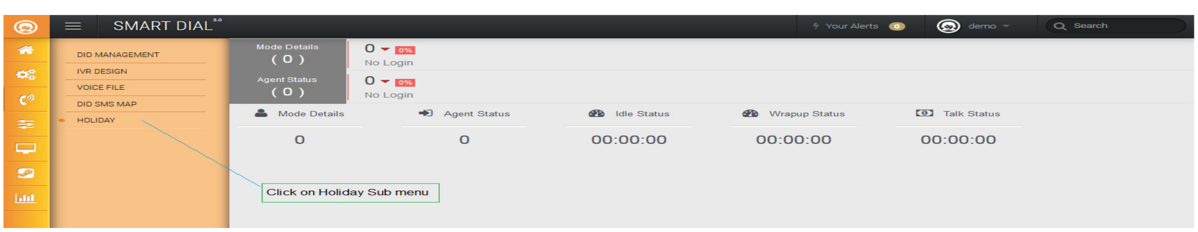
This mechanism facilitates user to upload the holiday voice prompt and lists.

When day comes for holiday then holiday voice file play on all the incoming DID.

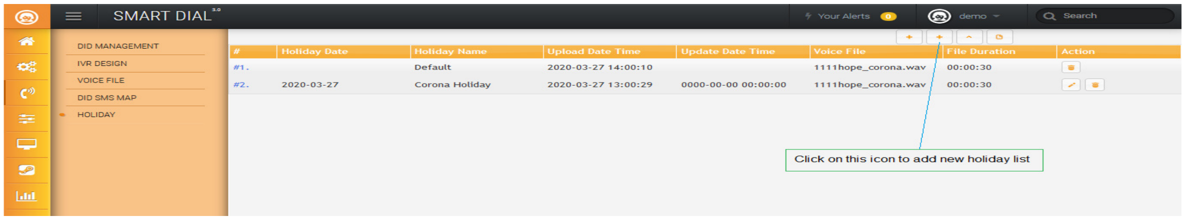
If any customer attempts to negotiate on holidays, the call will get hanged up by playing the audio file which uploaded.

Add New Holiday List

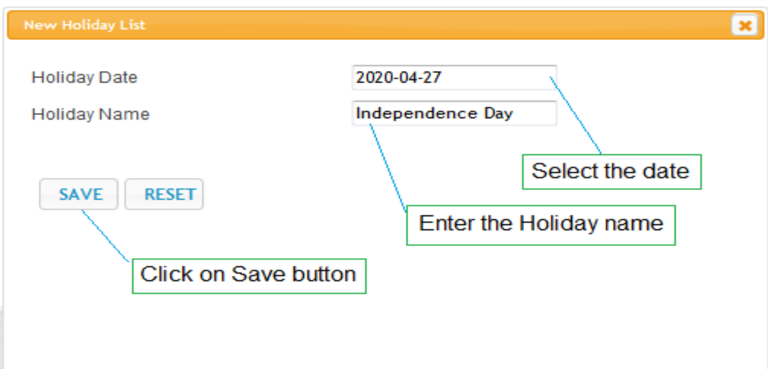
Step1: Go to Telephony configuration menu, Click on "Holiday" sub menu to enable appearance of holiday page



Step2: When Holiday page appears, then click on New Holiday List icon as shown in picture



Step3: New Holiday List page appears as follows:

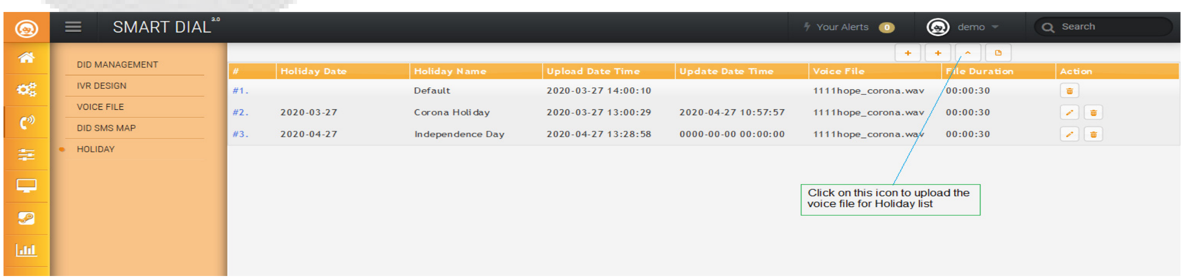


Step4: Select the date from Holiday Date calendar option and enter the name in Holiday Name as it shown in above picture

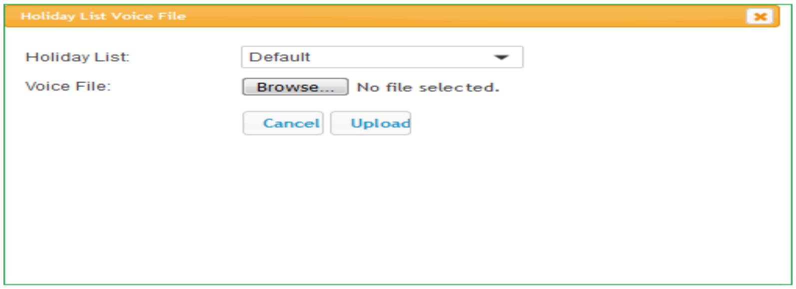
Step5: At last click on Save button to save the data.

<u>Add Voice file for holiday list</u>

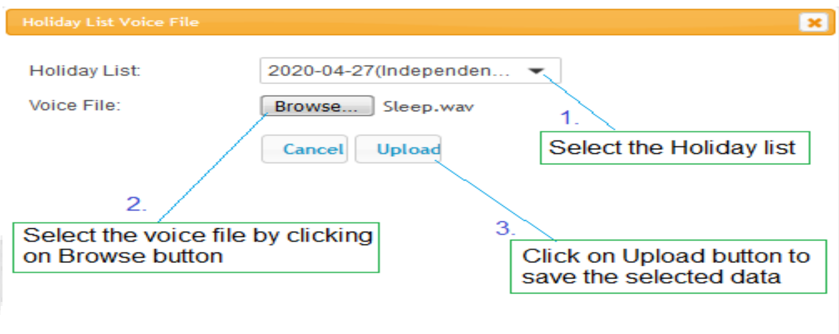
Step1: Consider the steps as above for opening holiday page, then click on "upload voice file" icon



Step2: "Holiday list Voice File" dialog box appears as follows:



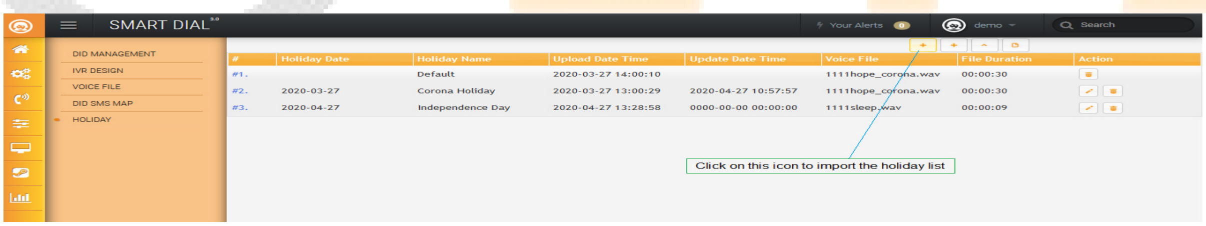
Step3: Select the Holiday list and Voice file as shown in picture



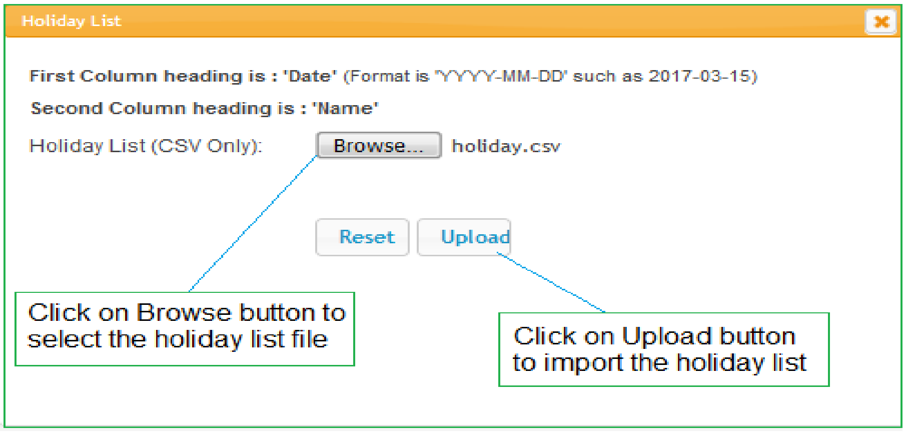
Step4: At last click on Upload button to save the selected data.

Import holiday list

Step1: Consider the steps as above for opening holiday page, then click on "Import holiday list" icon



Step2: Import holiday list page shows as follows:

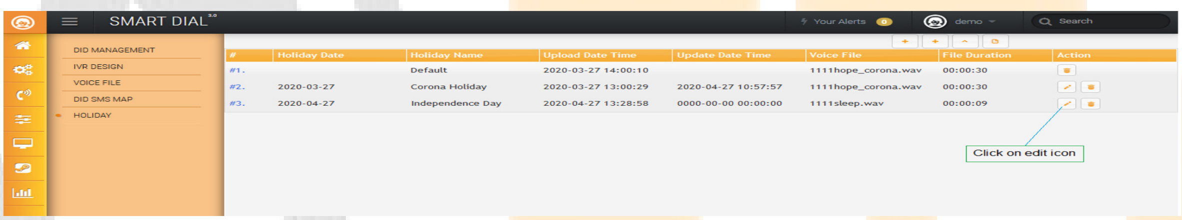


Step3: Click on Browse button to select the holiday list file

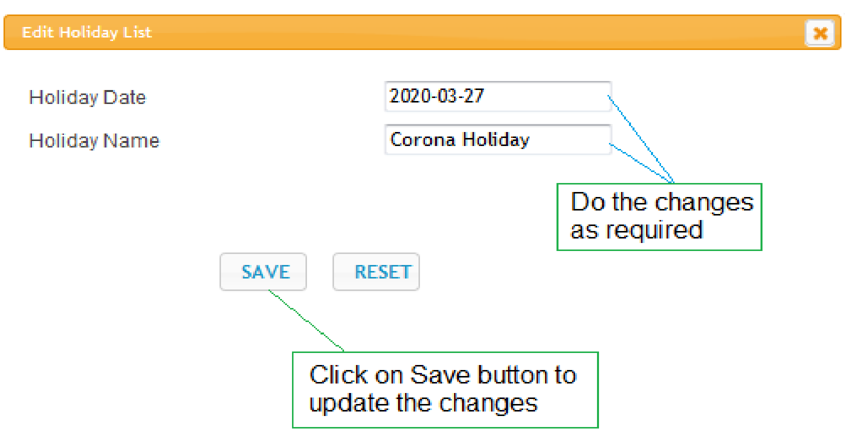
Step4: Then click on Upload button to import the holiday list in system

Edit holiday list

Step1: Consider the steps as above for opening holiday page, then click on “Edit” icon



Step2: Edit holiday list dialog box appears as follows:

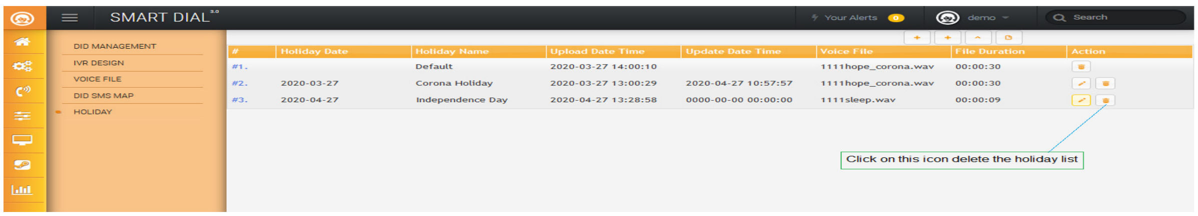


Step3: Do the changes as shown in above picture

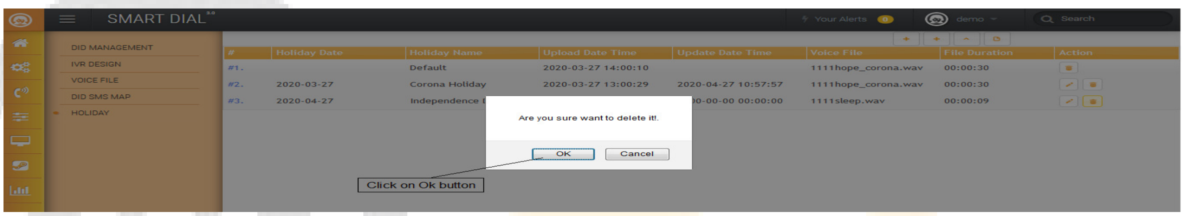
Step4: At last click on Save button to update the changes.

Delete holiday list

Step1: Consider the steps as above for opening holiday page, then click on "Delete" icon as shown in picture



Step2: After clicking the delete icon, a popup message asking a confirmation for delete



Step3: Now click on the "Ok" button, which will result removal of that data.

Operational Configuration

This module consists of creation, modification, setting pertaining to campaign and lead.

It is further divided into three sub modules:

1. Campaign Management – Consists of settings used to create, edit, delete and manage other features pertaining to campaign
2. Lead Management - Consists of settings used to create, edit, delete and manage other features pertaining to lead
3. Other Management – Used for Free Agent and Inbox mail assigning to agent

Now let's begin with the sub-modules of campaign management:

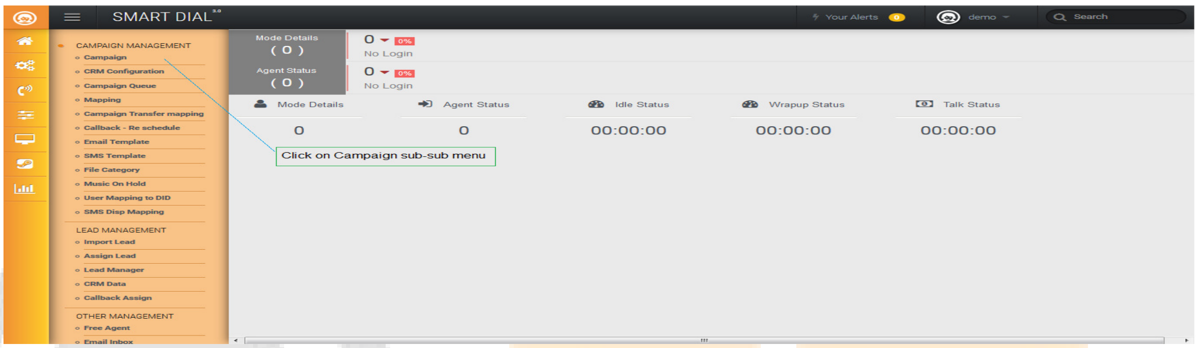
2.1.a.29 Campaign

This section facilitates creation of new campaign, editing existing campaign, deleting and so on.

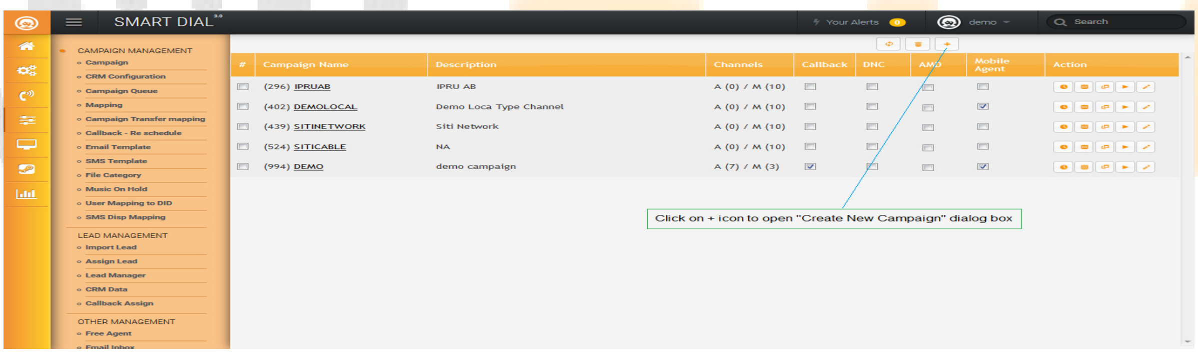
Now let’s explore the features beyond:

<u>Create a New Campaign</u>

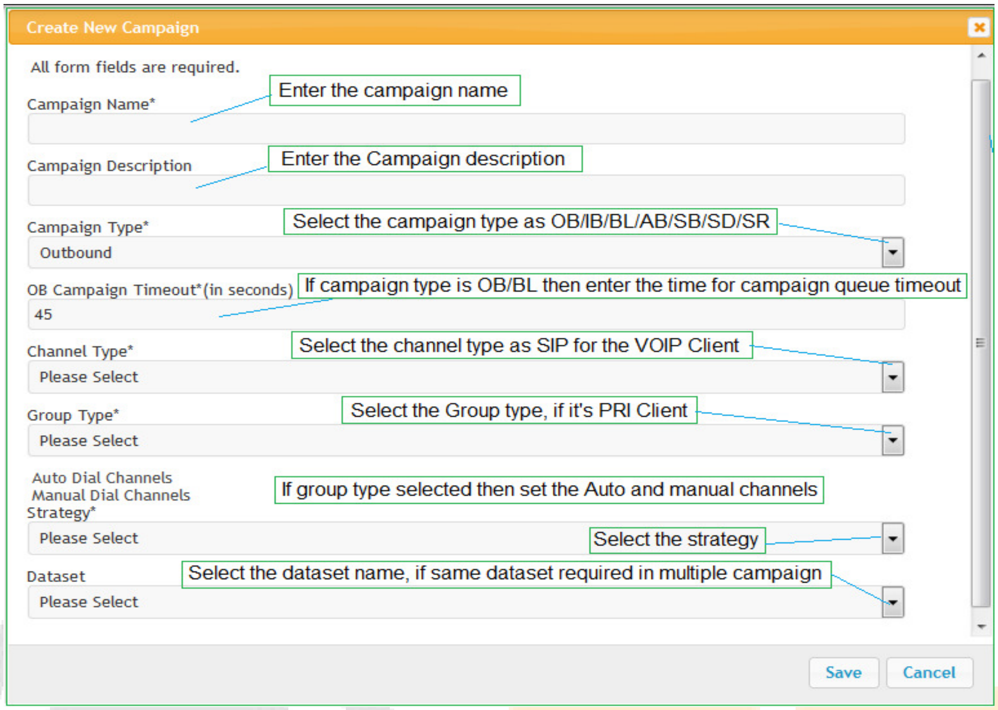
Step1: Go to “Operational Configuration” menu => Go to “Campaign Management” sub menu => Then click on “Campaign” sub-sub menu to enable appearance of campaign page



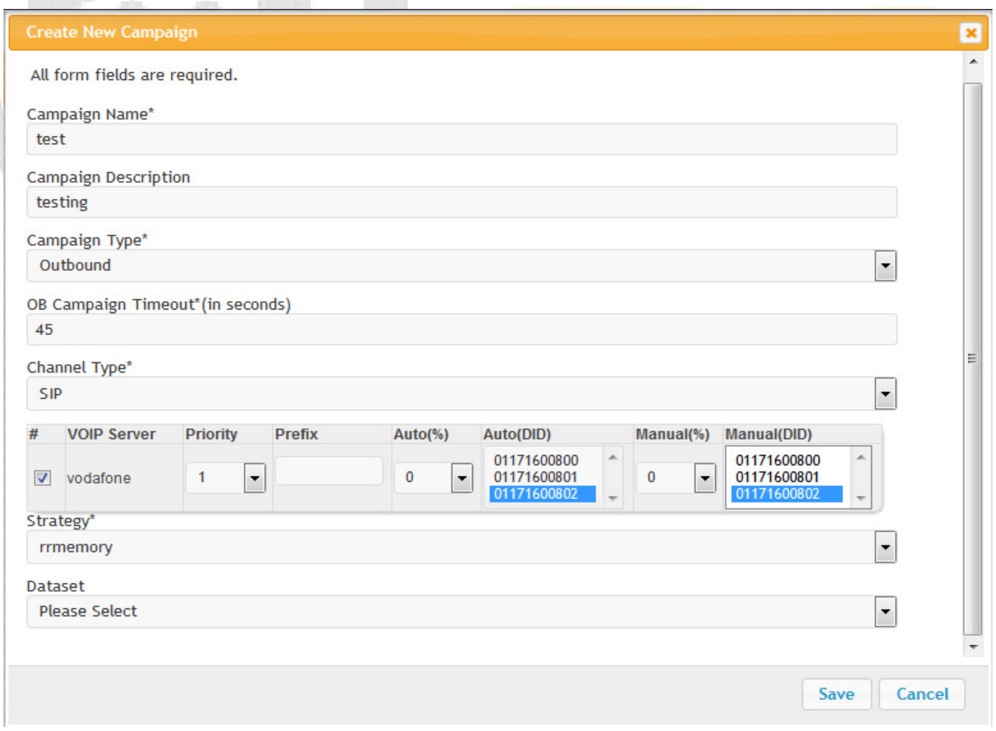
Step2: When Campaign page appears, click on + icon to open a campaign dialog box



Step3: Create New Campaign dialog box appears as follows:



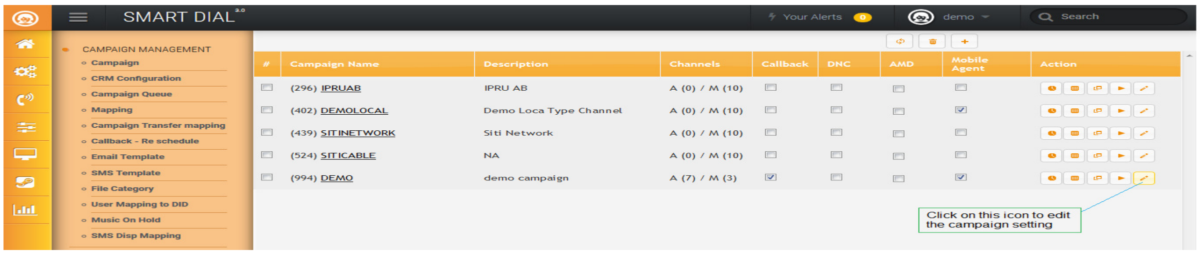
Step4: Fill up the appropriate data as follows:



Step5: At last click on Save button to save the data.

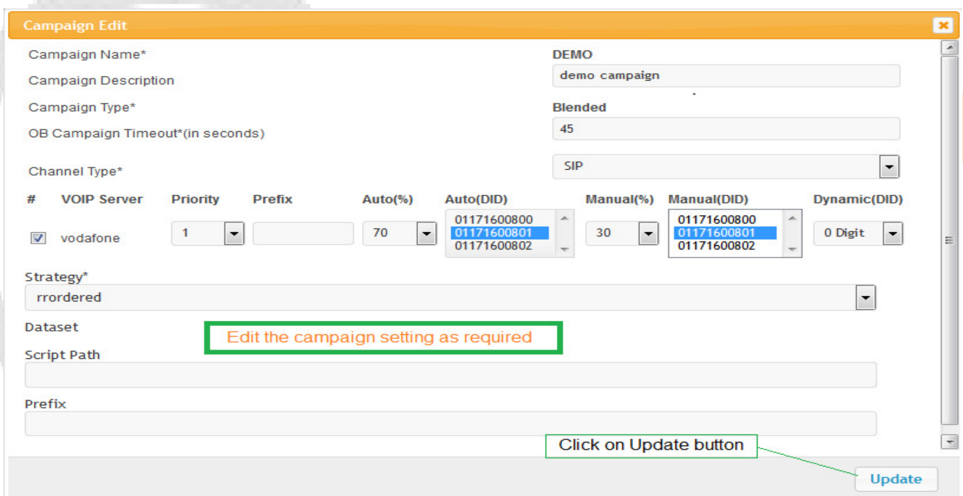
Edit Campaign

Step1: Consider the steps as above for opening Campaign page



Step2: Then click on (edit) icon to open the “Campaign Edit” dialog box as shown in above picture

Step3: Edit the campaign setting as required

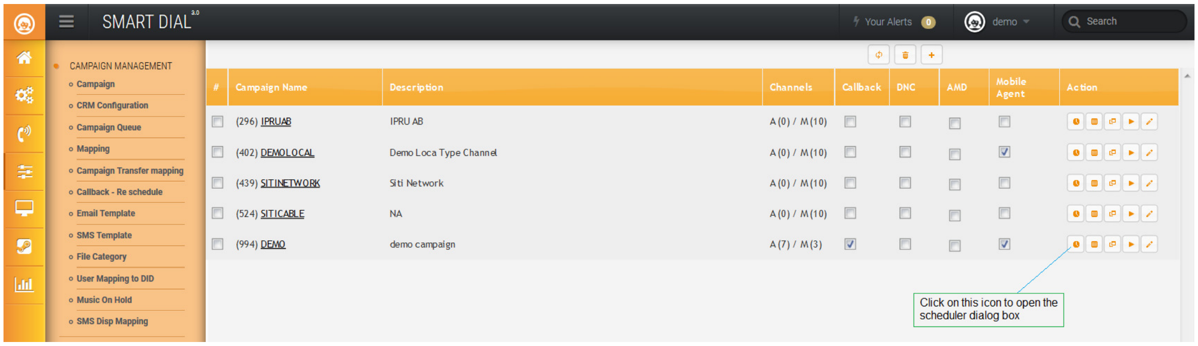


Step4: Then click on Update button to update the changes.

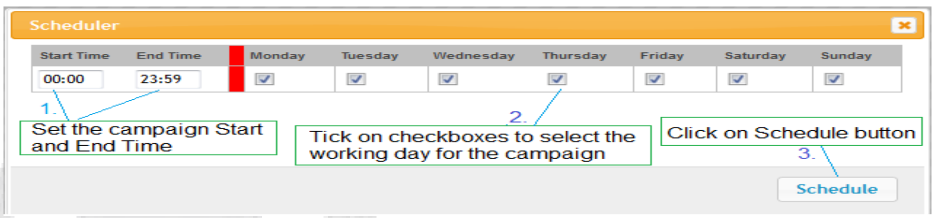
Schedule a Campaign

This mechanism enables to activate a campaign as per desired day/time, the campaign is valid only on the day/time it is selected for.

Step1: Consider the steps as above for opening Campaign page



Step2: Then click on (scheduler) icon to open the scheduler dialog box as shown in above picture



Step3: Set the campaign start and end time

Step4: Then tick on checkboxes to select the working days for the campaign

Step5: After clicking on Scheduler button, a popup asking a confirmation for schedule with Ok and Cancel button

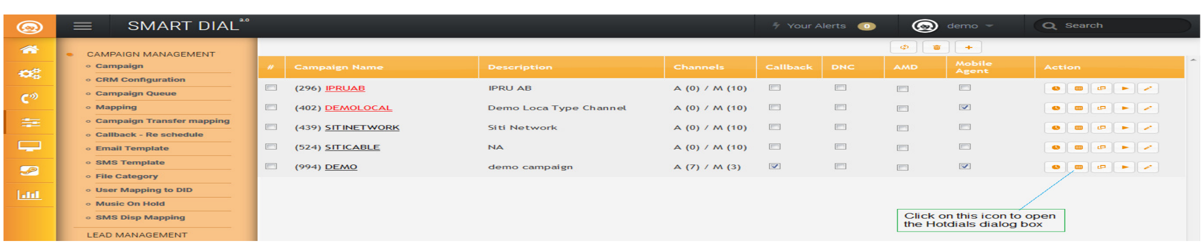
Step6: As we click on Ok button then a message dialog box shows as "Schedule Update Successfully...!"

Step7: Then click on Ok button to close the message dialog box.

Set the Hotdials for the Campaign

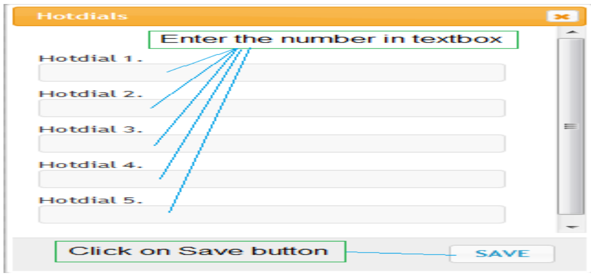
This mechanism facilitates merging single digit ranging from (1-5) to a 10 digit telephone number to give a quick one digit dial via agent application.

Step1: Consider the steps as above for opening Campaign page



Step2: Then click on (Hotdials) icon to open the Hotdials dialog box

Step3: Hotdials dialog box appears as follows:



Step4: Enter the number in Hotdial1 to Hotdial5 textboxes then click on Save button

Step5: As we click on Save button then a popup message shows as “Hotdial number saved...!”

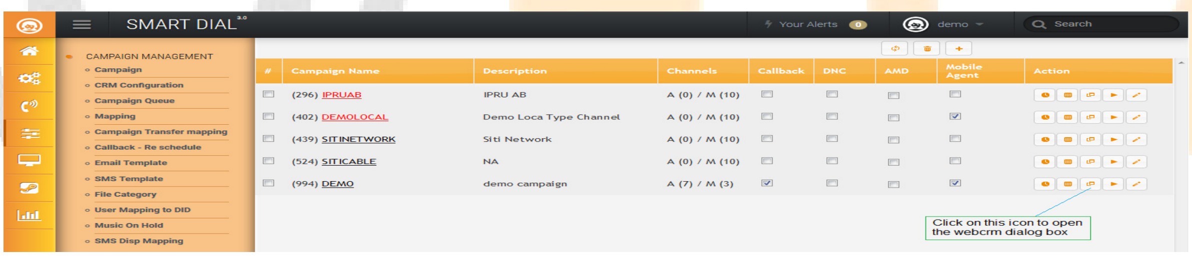
Step6: Click on Ok button to close the message box.

<u>External Web CRM for the Campaign</u>

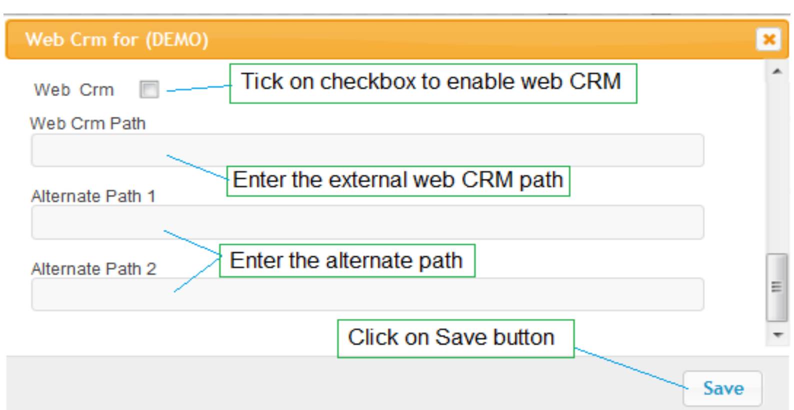
This mechanism facilitates users to enable web CRM and set web CRM path as follows for :

Step1: Consider the steps as above for opening Campaign page

Step2: Then in campaign page, there is an web CRM icon located as shown in picture



Step3: After clicking on "Web CRM" icon a dialog box open as "Web CRM for <campaign name>"



Step4: In the dialog box, enable web crm checkbox and enter the Web CRM Path as follows:

http://XXX.XXX.XXX.XXX/crm.php

Step5: At last click on "Save" button to update the data

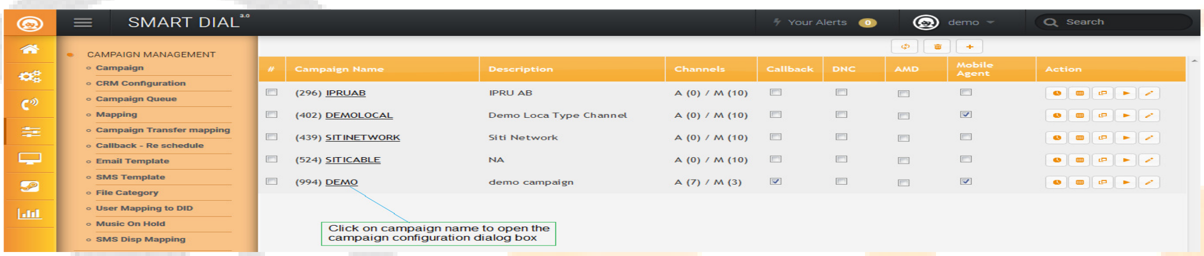
Step6: As we click on Save button, message shows as "Updation done"

Step7: Then click on "Ok" button and click on "Close" icon to close the dialog box for "Web CRM for <campaign name>"

Campaign Configuration

Campaign configuration enables us to set timings for various events including call wrapup time, call time difference, call originate time, call dialing ratio, auto dispose duration and so on

Step1: Consider the steps as above for opening Campaign page



Step2: Then in campaign page, click on name of any campaign to let campaign configuration dialog box appear.

Step3: Here in the campaign configuration dialog box adjust the seek bars as per desired timings

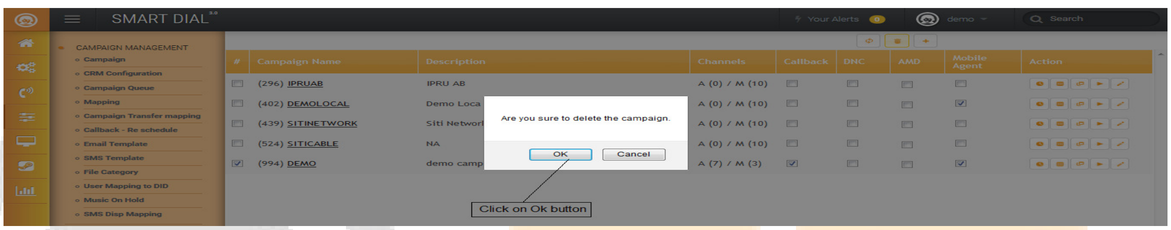
Step4: Then click on button to save the setting, once the settings have been saved then hit “X” button to quit the Campaign Configuration.

Delete Campaign

Step1: Consider the steps as above for opening Campaign page

Step2: Then in campaign page, tick on checkbox of campaign to select it.

Step3: After clicking the delete icon, a popup message asking a confirmation for delete



Step4: Now click on the “Ok” button, which will result removal of that data.

Callback Setting in Campaign

If checkbox button is ticked then it will enable functionality of callbacks in the agent with respect to the campaign else callback not allowed in agent.

DNC Setting in Campaign

If the checkbox button is ticked then it will enable functionality of DNC module.

User able to add number in DNC through the agent application.

When admin user upload the number through lead management then its check the DNC number through the DNC database.

AMD Setting in Campaign

If this checkbox is ticked then it will enable activation of AMD else AMD won’t be activated.

Mobile Agent Setting in Campaign

If this checkbox is ticked, then it enables mobile number act as negotiation interface other than agent while logged in as agent.

2.1.a.30 CRM Configuration

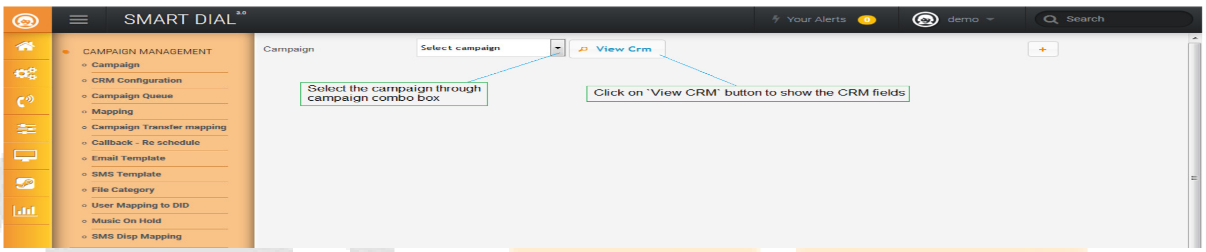
This mechanism is used to create the CRM fields for campaign.

Type of CRM fields are text, Number, Date, Radio, checkbox, Combo and List.

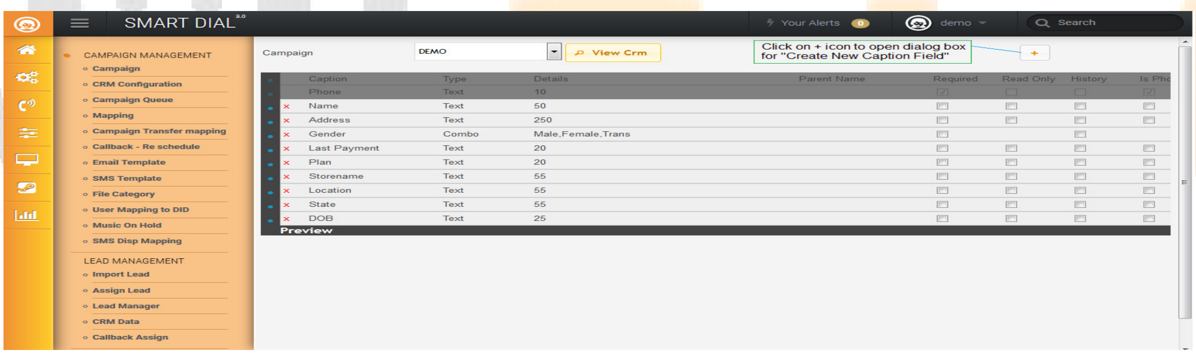
Before creating new CRM and assigning parents, kindly note the conditions: Only Text, Number, combo and list can be set as child.

<u>Creation Of CRM Fields:</u>

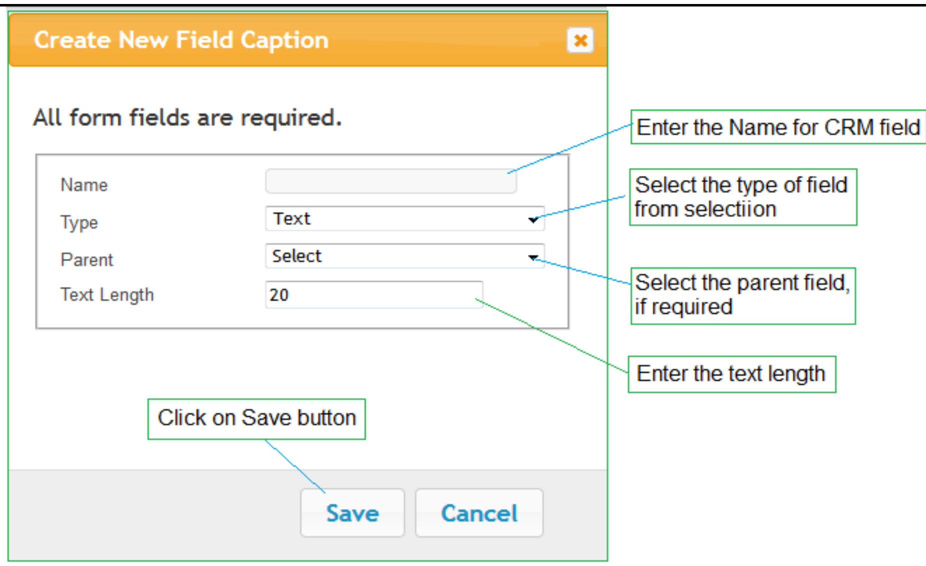
Step1: Go to "Operational Configuration" menu => Go to "Campaign Management" sub menu => Then click on "CRM Configuration" sub-sub menu to enable appearance of CRM Configuration page



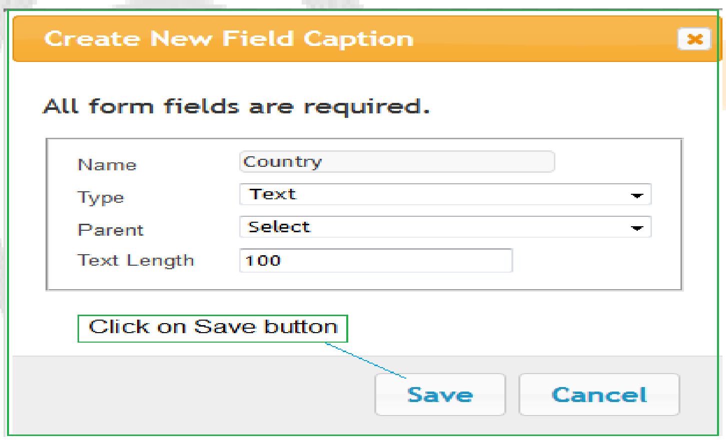
Step2: When campaign selected then click on + icon to open dialog box for "Create New Caption Field"



Step3: "Create New Caption Field" dialog box appears as follows:



Step4: Fill up the appropriate data as shown in picture

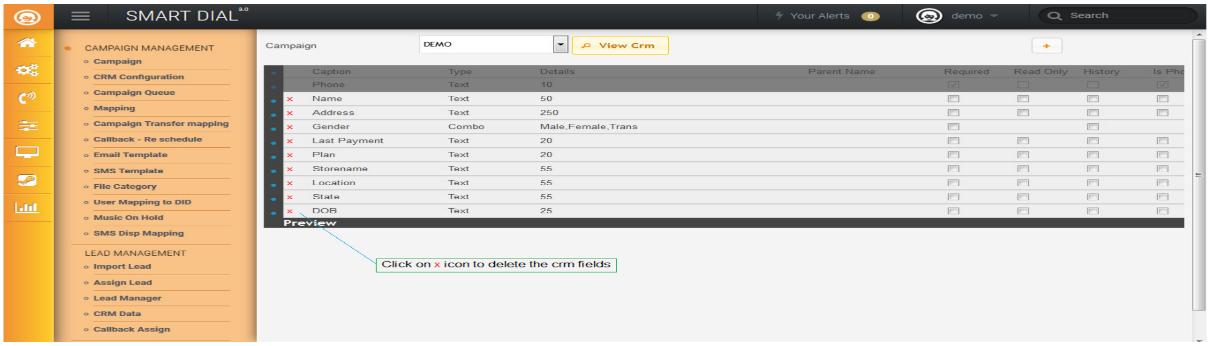


Step5: Then click on Save button save the selected and entered data.

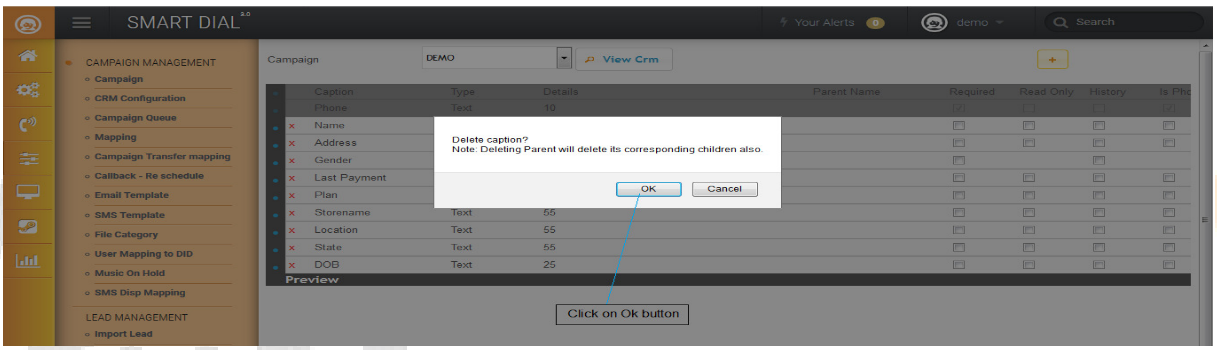
Deletion Of CRM Fields:

Step1: Consider the steps as above for opening the CRM fields

Step2: When CRM fields shows then click on cross (x) icon to delete the crm field as shown in picture

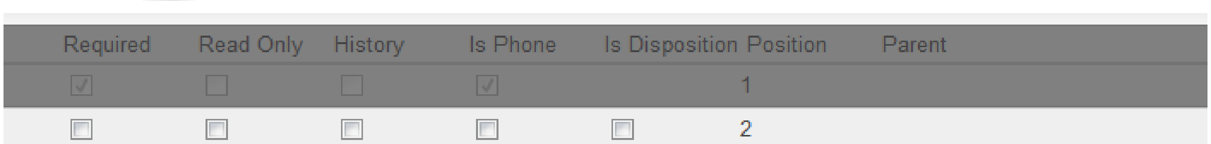


Step3: After clicking the cross (X) icon, a popup message asking a confirmation for delete



Step4: Now click on the "Ok" button, which will result removal of that data.

Description of checkboxes :



Checkbox 1 - Required - If this button is ticked, then entering this detail will be mandatory

Checkbox 2 - Read Only - If this button is ticked, then this slot won't be editable, especially applied to seal the crm details received from lead.

Checkbox3 - History - If a crm detail is marked for history checkbox, then this detail will show in the history section after clicking on 'History' button in CRM.

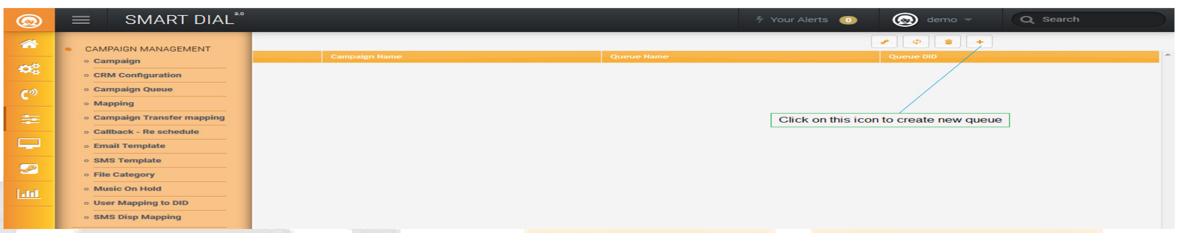
Checkbox4 - Is Disposition - If this checkbox is ticked, then this detail will be shown in the disposition report.

2.1.a.31 Campaign Queue

Campaign queue transfers occur when an agent transfers a call to another campaign queue after informing customer that we are transferring your call to right department.

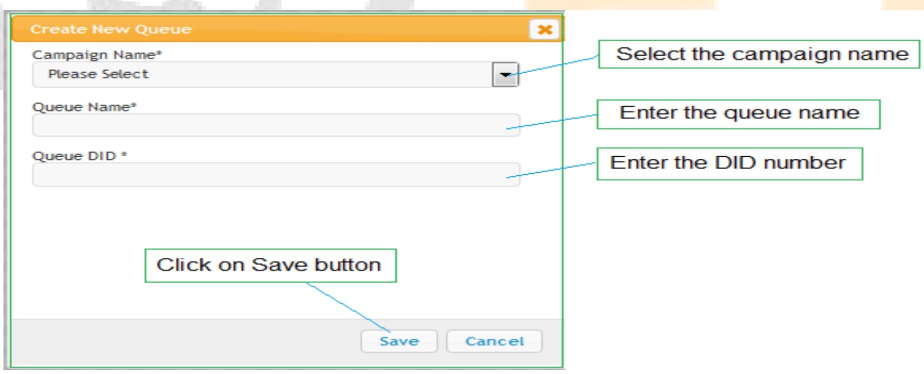
Campaign Queue creation

Step1: Go to “Operational Configuration” menu => Go to “Campaign Management” sub menu => Then click on “Campaign Queue” sub-sub menu to enable appearance of Campaign Queue page



Step2: When campaign queue page appears then click on + icon to open “Create New Queue” dialog box

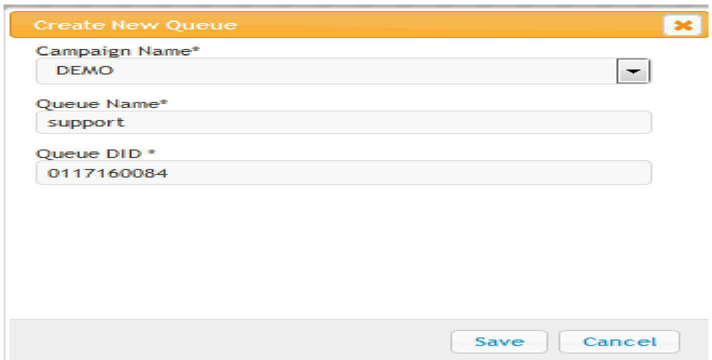
Step3: “Create New Queue” dialog box appears as follows:



Step4: First select the campaign from `campaign name` textbox

Step5: Then enter the `queue name` for DID

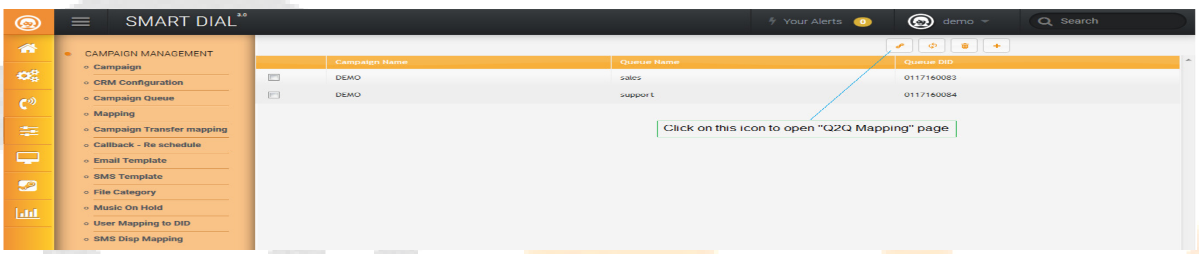
Step6: After that enter the `Queue DID` in Digits.



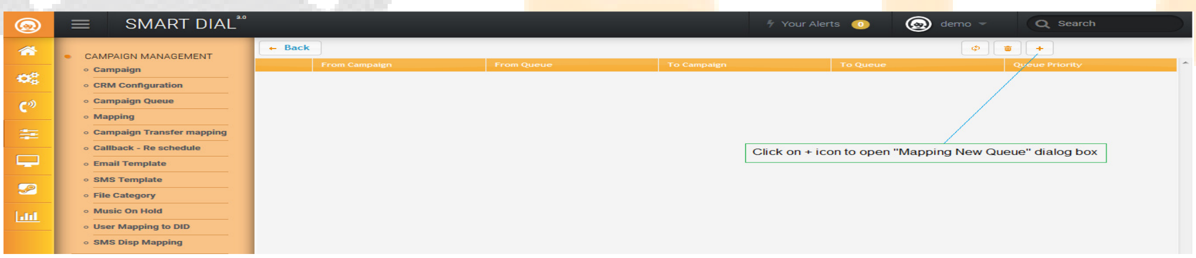
Step7: At last click on Save button to save the data.

Q2Q Mapping

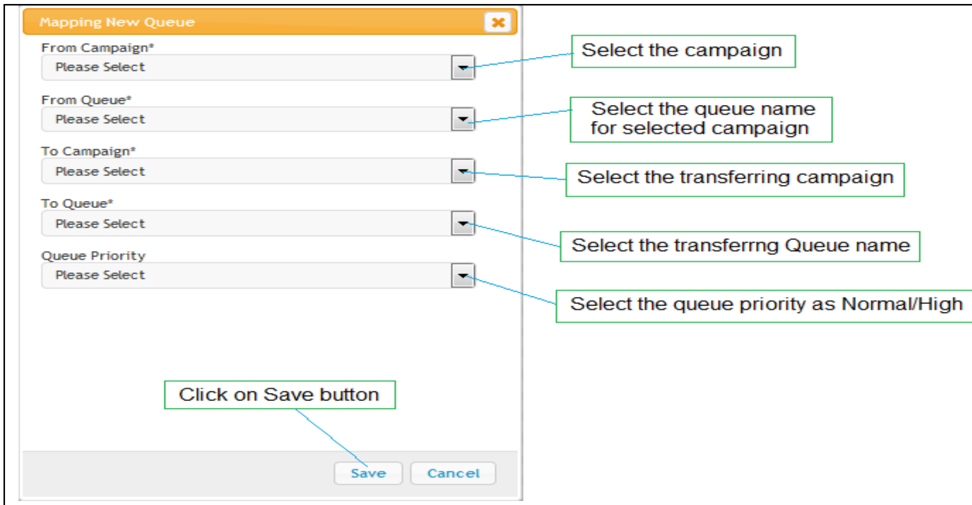
Step8: Then click on Q2Q Mapping icon as shown in below figure



Step9: "Q2Q Mapping" page open with queue to queue mapping details.



Step10: Then click on Plus (+) icon to open "Mapping New Queue" dialog box as shown in below figure



Step11: First select the transferor campaign “From Campaign” combo box

Step12: “From Queue” name shows on the basis of campaign selection in “From Campaign”.

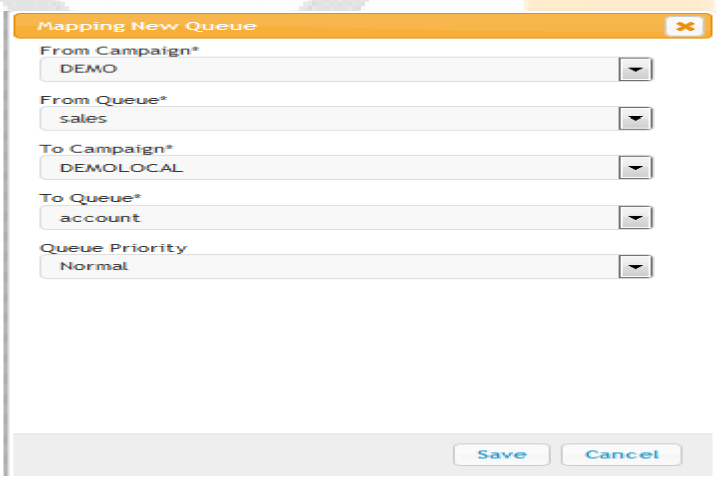
Step13: Then select the queue name from “From Queue” combo box

Step14: After that select the transferee campaign from “To Campaign” combo box

Step15: “To Queue” shows on the basis of campaign selection in “To Campaign”.

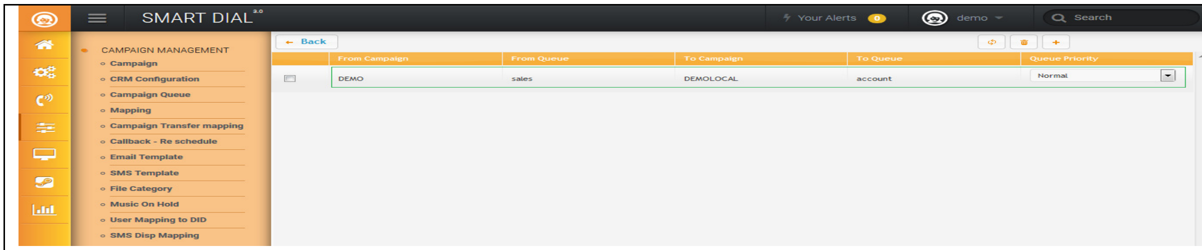
Step16: Then select the queue name from “To Queue” combo box

Step17: After that select the “Queue priority” as Normal or High.



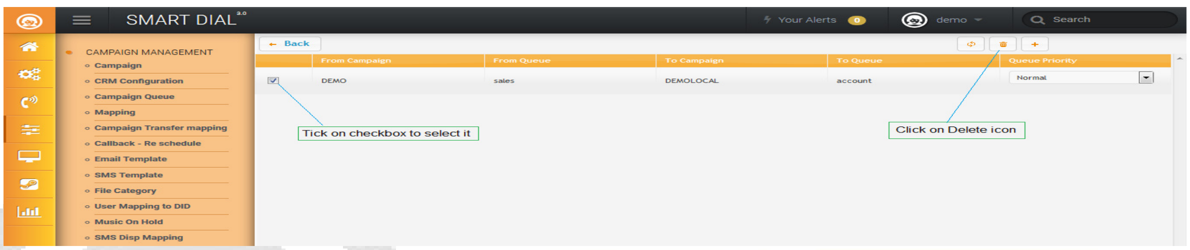
Step18: At last click on Save button to save the data.

Step19: After clicking on Save button data shows as follows in Queue to Queue page.



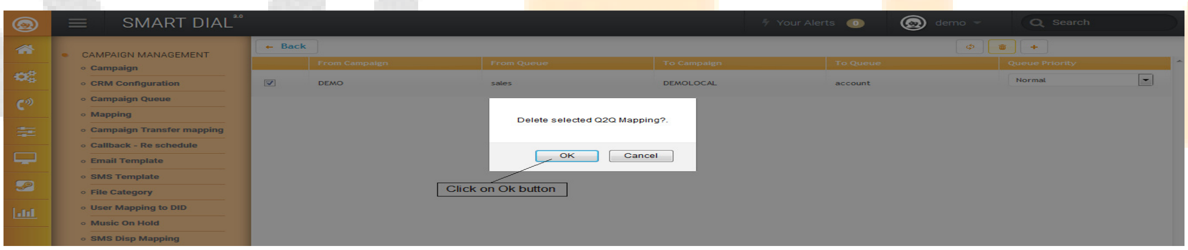
Delete Q2Q Mapping data

Step1: When mapping data shows on Queue to Queue page, first tick on checkbox to select the data



Step2: Then click on Delete icon to delete the selected data

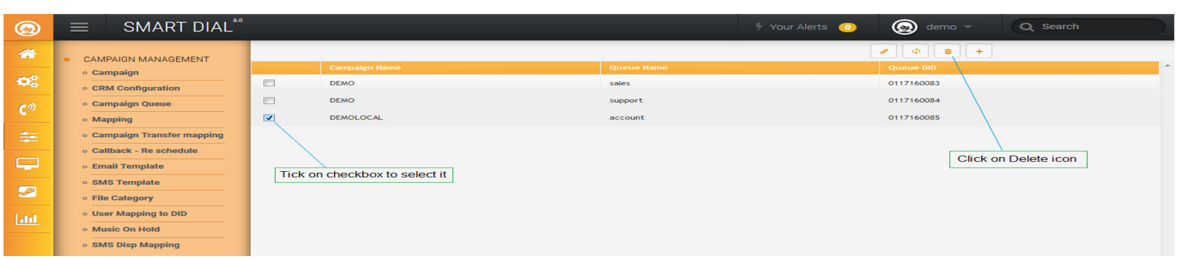
Step3*:* After clicking the delete icon, a popup message asking a confirmation for delete



Step4: Now click on the “Ok” button, which will result removal of that data.

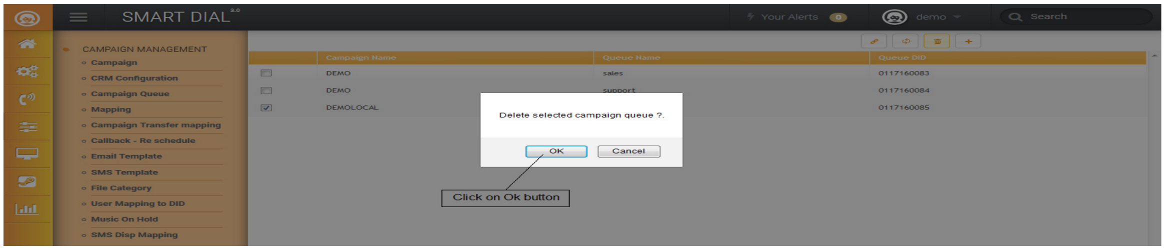
Delete Campaign Queue data

Step1: When campaign queue data shows on Campaign Queue page, first tick on checkbox to select the data



Step2: Then click on Delete icon to delete the selected data

Step3: After clicking the delete icon, a popup message asking a confirmation for delete



Step4: Now click on the "Ok" button, which will result removal of that data.

2.1.a.32 Mapping

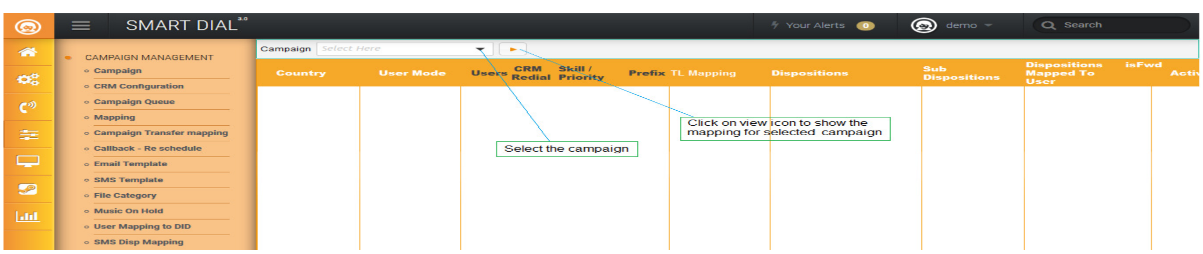
This mechanism is used for providing the feature enabling/disabling to Campaign/User.

Features are:

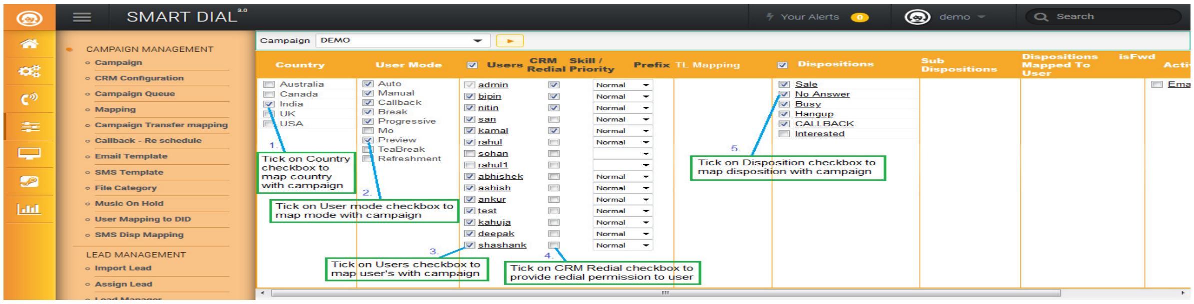
- User Mode Mapping to Campaign
- User Mapping to Campaign
- Disposition Mapping to Campaign and User
- Skill Mapping to Campaign and User
- Activity mapping to Campaign and User
- TL Mapping to User

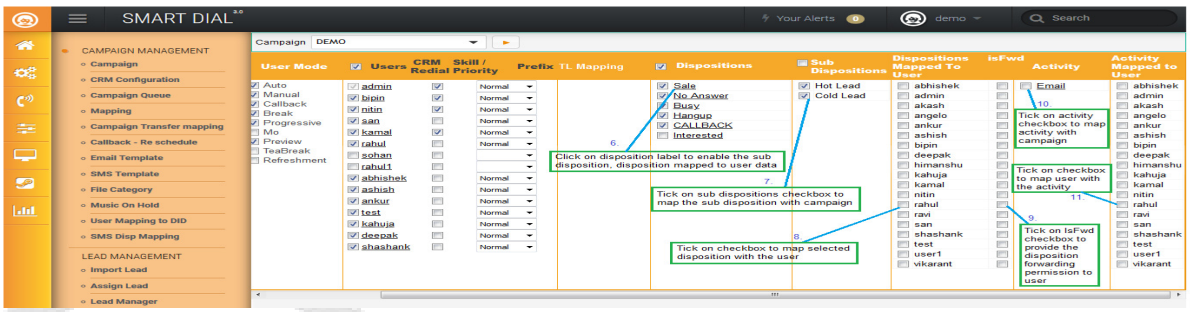
View Mapping data of a campaign

Step1: Go to "Operational Configuration" menu => Go to "Campaign Management" sub menu => Then click on "Mapping" sub-sub menu to enable appearance of mapping page



Step2: Select the campaign name from campaign combo box then click on view icon to show the mapping data as follows:

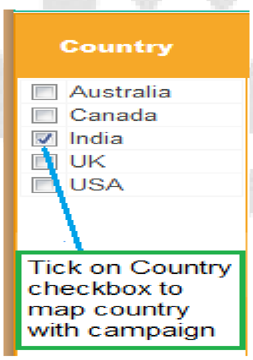




Map Country with campaign

Step1: Consider the steps as above to show mapping data of campaign

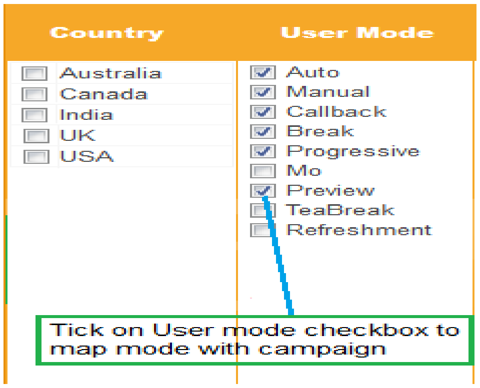
Step2: Then tick on Country checkbox to map the country with selected campaign



Map User Mode with campaign

Step1: Consider the steps as above to show mapping data of campaign

Step2: Then tick on User mode checkbox to map the user mode with campaign as it shown in picture

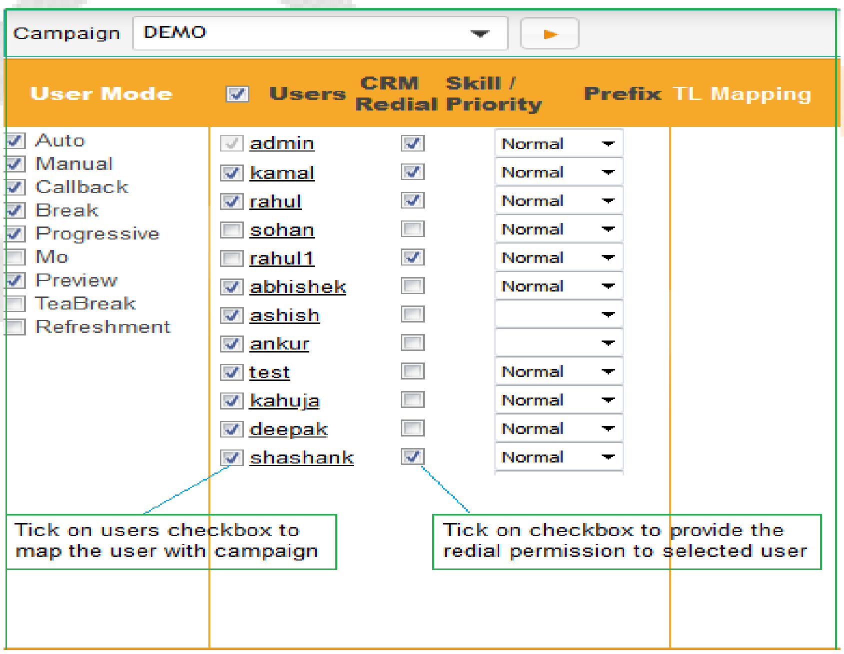


Map User's with campaign & Provide Redial Permission to User

Step1: Consider the steps as above to show mapping data of campaign

Step2: Then tick on User's checkbox to map the user with the campaign

Step3: After that tick on CRM Redial checkbox to provide the redial permission for selected user as it shown in picture



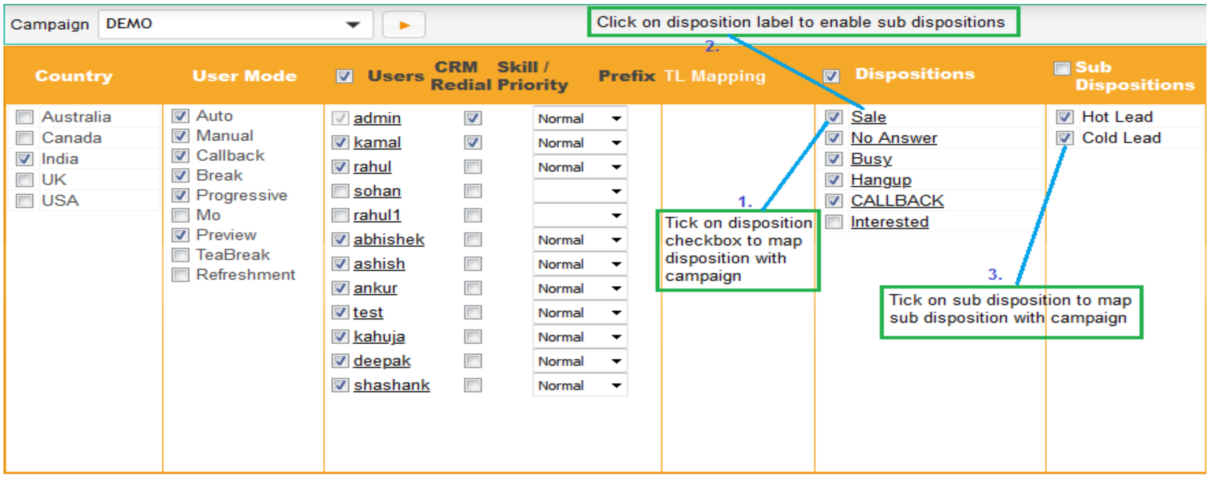
Map Disposition and Sub Disposition with campaign

Step1: Consider the steps as above to show mapping data of campaign

Step2: Then tick on disposition checkbox to map the disposition with campaign

Step3: After that click on disposition label to enable sub disposition in sub disposition column

Step4: At last tick on sub disposition to map sub disposition with campaign as shown in picture

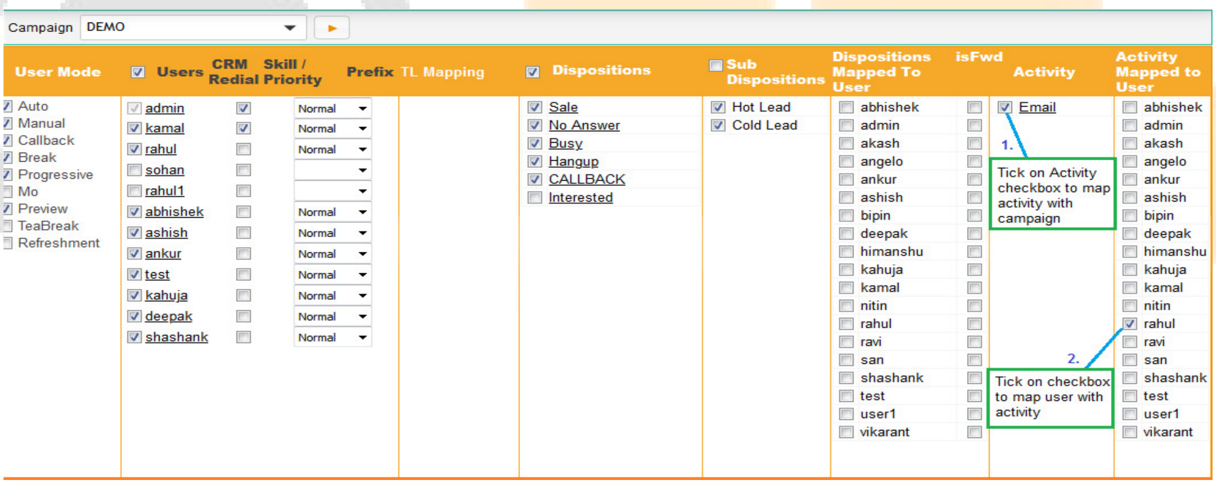


Map Activity with campaign & User

Step1: Consider the steps as above to show mapping data of campaign

Step2: Then tick on activity checkbox to map the activity with campaign

Step3: At last tick on "Activity mapped to User" checkbox to map user with selected activity as shown in picture

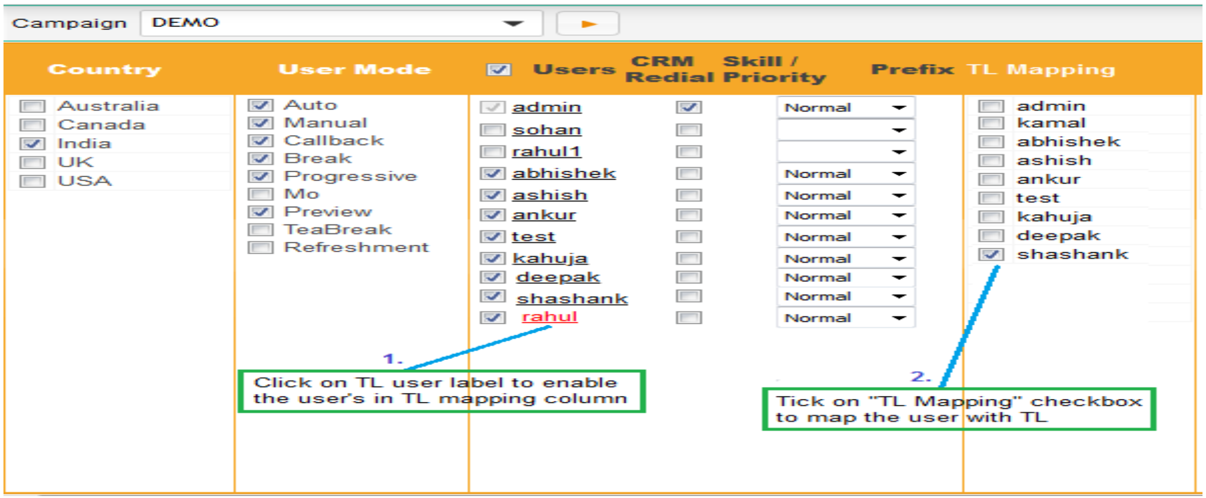


Map TL with User

Step1: Consider the steps as above to show mapping data of campaign

Step2: Then Click on TL user label to enable the user's in TL mapping section

Step3: At last tick on "TL Mapping" checkbox to map the user with TL as it shown in picture.

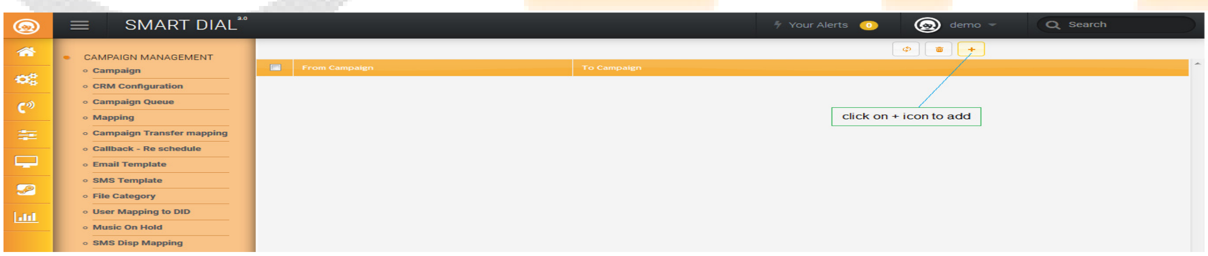


2.1.a.33 Campaign Transfer Mapping

Campaign transfer occurs when an agent transfers a call to another campaign after informing customer that we are transferring your call to right department.

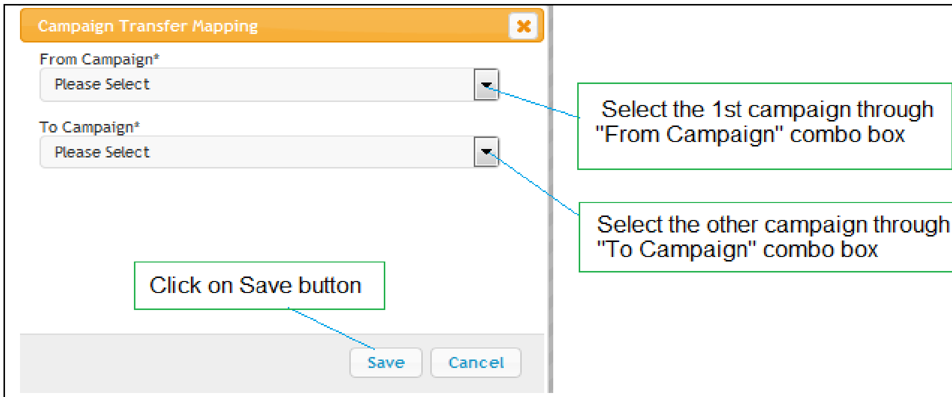
Add data for campaign transfer mapping

Step1: Go to "Operational Configuration" menu => Go to "Campaign Management" sub menu => Then click on "Campaign Transfer mapping" sub-sub menu to enable appearance of Campaign transfer mapping page



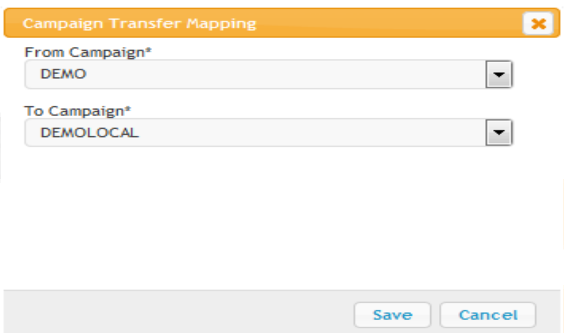
Step2: After that click on Plus (+) icon to add data in "Campaign Transfer Mapping" option

Step3: "Campaign Transfer Mapping" Dialog Box open for mapping the campaign from one to another



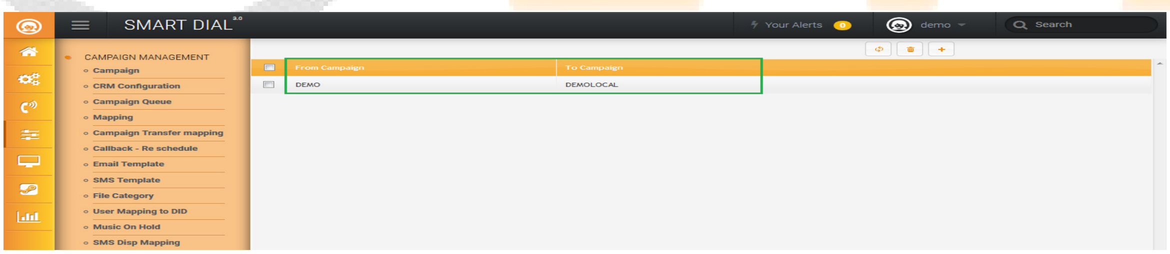
Step4: Then select the 1st campaign through “From Campaign” combo box

Step5: After that select the other campaign through “To Campaign” combo box



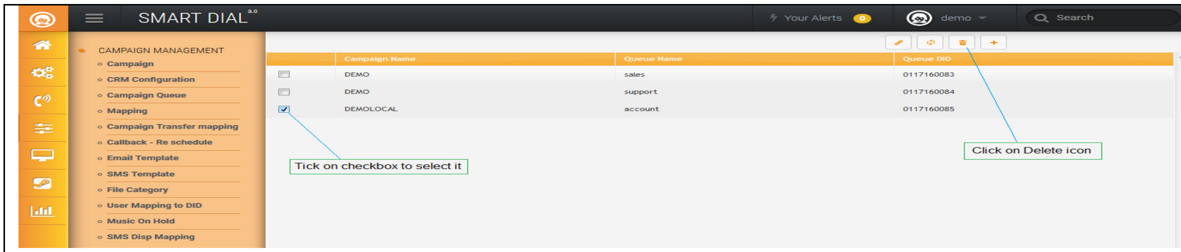
Step6: At last click on Save button to save the data

Step7: After click on Save button “Campaign Transfer Mapping” page open with campaign transferring details as follows:



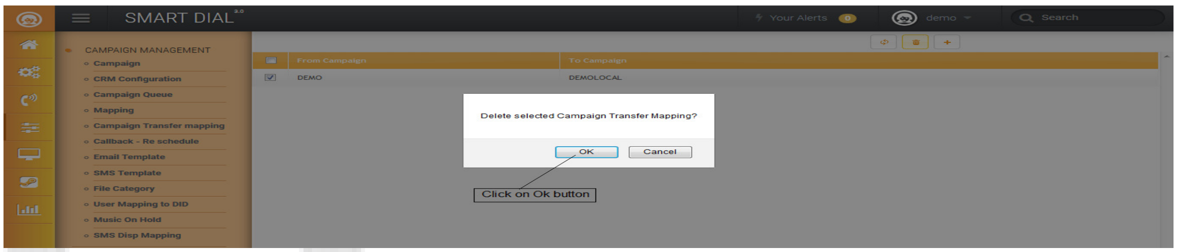
Delete data for campaign transfer mapping

Step1: When campaign transfer mapping data shows on Campaign transfer mapping page, first tick on checkbox to select the data



Step2: Then click on Delete icon to delete the selected data

Step3: After clicking the delete icon, a popup message asking a confirmation for delete

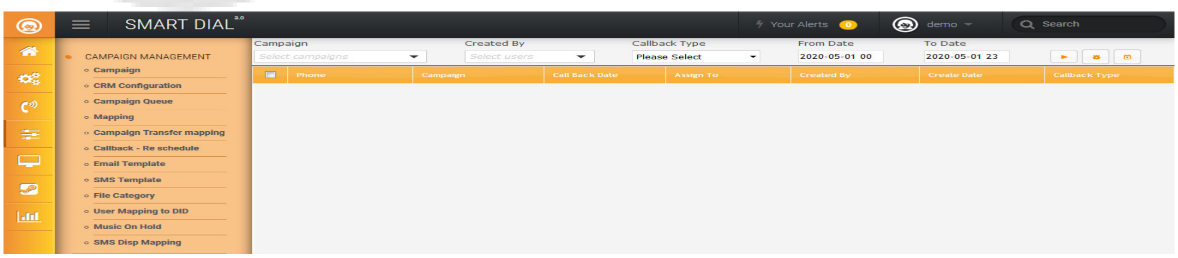


Step4: Now click on the "Ok" button, which will result removal of that data.

2.1.a.34 Callback Re Schedule

This mechanism enables to reschedule existing callbacks created earlier.

Step1: Go to "Operational Configuration" menu => Go to "Campaign Management" sub menu => Then click on "Callback - Re schedule" sub-sub menu to enable appearance of `Callback Re schedule` Page



Step2: Select the Single/Multiple campaign, date range and other search criteria option

Step3: After that click on "View" icon to display the data on panel

Step4: Select the respective data by clicking on checkbox icon

Step5: As we click on "Assign" icon then a small dialog box open as "Want to reassign?" with `Ok` and `Cancel` button

Step6: When we click on "Ok" button then new dialog box open as "Set Assign To Details" with "Assign To" and "Callback Date" change option

Step7: Select option as `Campaign` or `userid` from "Assign To" combo-box for Assigning change.

Step8: After that click on "Callback Date" text box to open the calendar for callback date-time selection

Step9: When date-time selection done then click on "Save" button for data saving.

Step10: As we click on Save button then message dialog box open as "Save Successfully..!" with `Ok` button

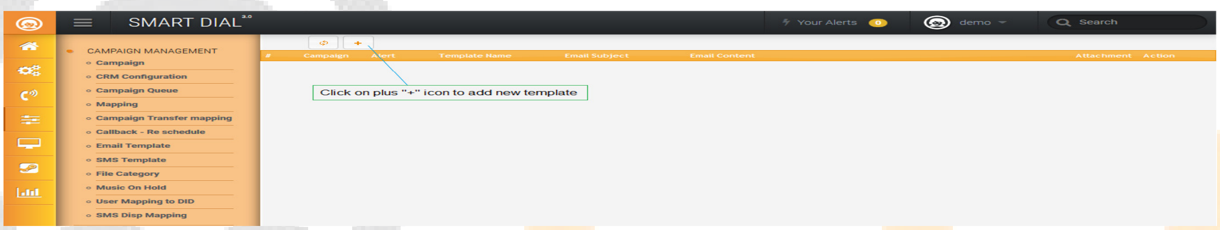
Step11: At last click on "Ok" button for closing the message dialog box.

2.1.a.35 Email Template

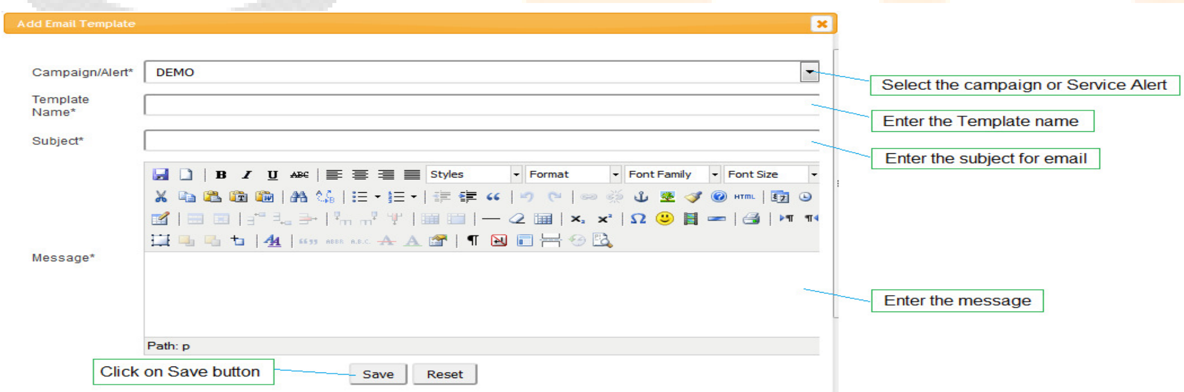
This mechanism enables to create new email template, which used in agent application for sending the email to customer.

Add Email Template

Step1: Go to "Operational Configuration" menu => Go to "Campaign Management" sub menu => Then click on "Email Template" sub-sub menu to enable appearance of `Email Template` Page



Step2: Click on Plus + icon to open "Add Email Template" dialog box as shown in picture



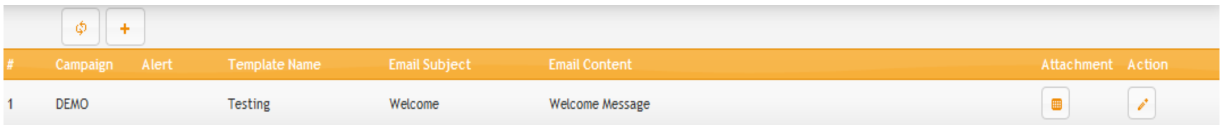
Step3: Fill up the appropriate data as shown in above picture

Step4: First select the campaign or service alert

Step5: Then Enter the Template name, Subject and message

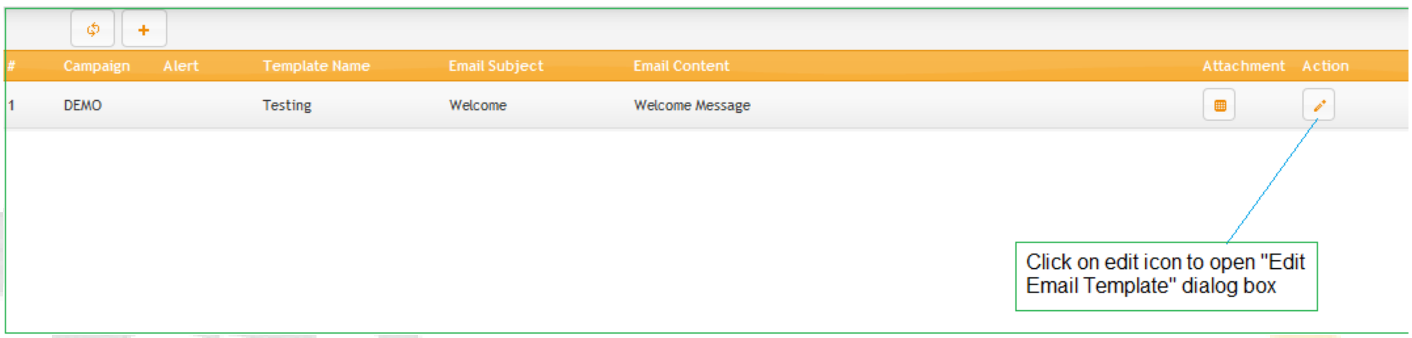
Step6: At last click on Save button to save the data

Step7: Then click on Refresh button to show the data on Email Template page as follows:

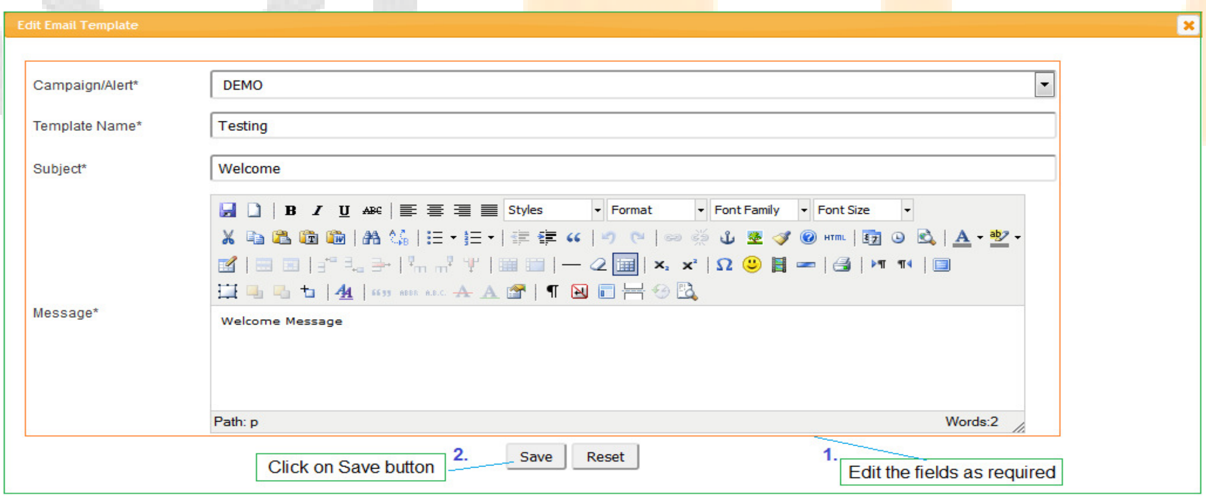


Edit Email Template

Step1: When email template page shows as follows, then click on edit icon



Step2: After clicking on edit icon, “Edit Email Template” dialog box open as follows:

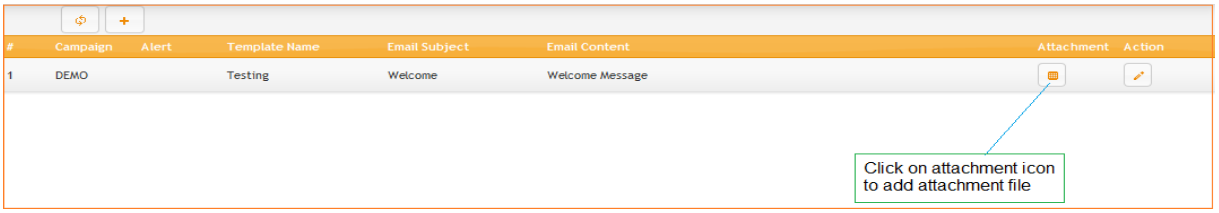


Step3: Edit option available on all the field (campaign or service alert, template name, subject and message)

Step4: Edit the setting as required, and then click on Save button.

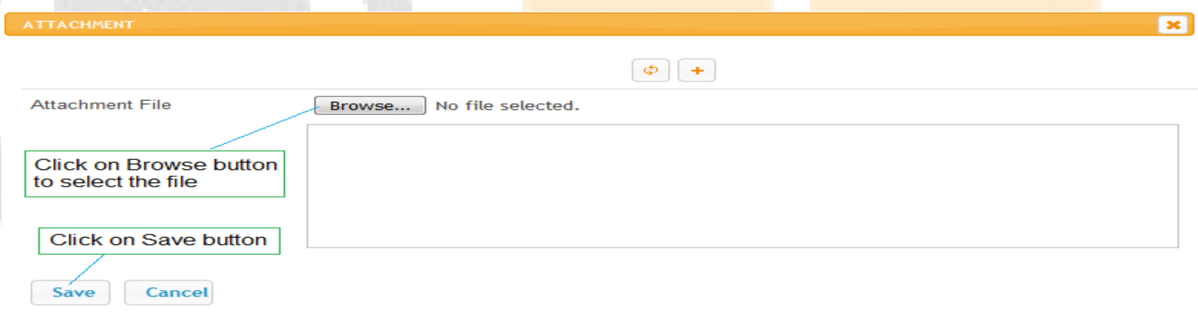
Add attachment for email template

Step1: When email template page shows as follows, then click on attachment icon



Step2: After clicking on attachment icon, “Attachment” dialog box shows as follows:

Step3: Then click on add attachment icon, to open the file selection window



Step4: After that select the file by clicking on Browse button

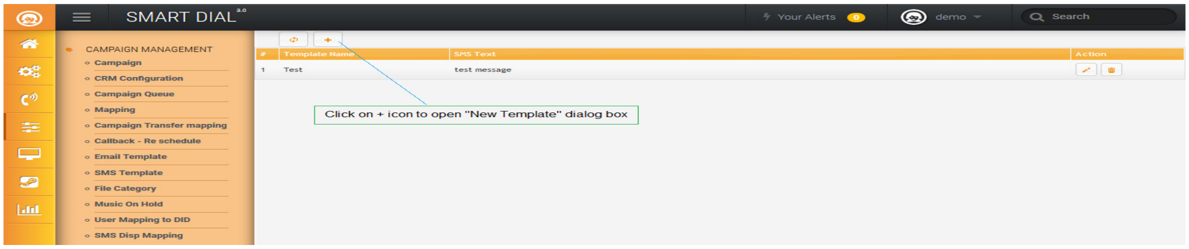
Step5: The click on save button to upload the attachment file

2.1.a.36 SMS Template

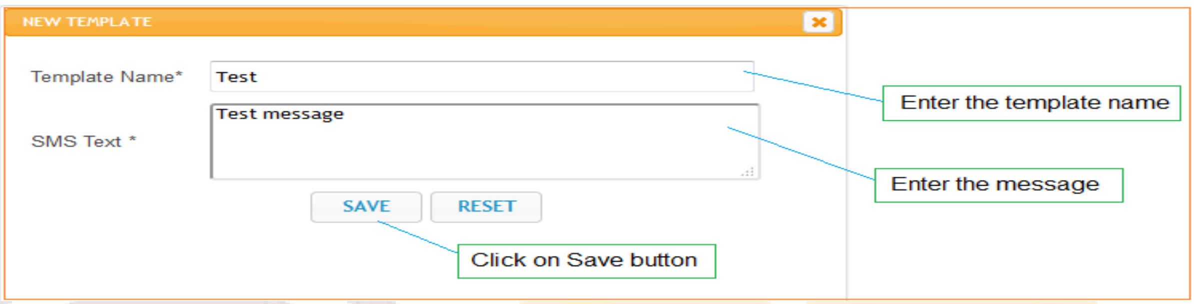
This mechanism enables to create new SMS template, which used for sending SMS to customer.

Add SMS Template

Step1: Go to “Operational Configuration” menu => Go to “Campaign Management” sub menu => Then click on “SMS Template” sub-sub menu to enable appearance of `SMS Template` Page



Step2: Click on Plus + icon to open “New Template” dialog box as shown in picture



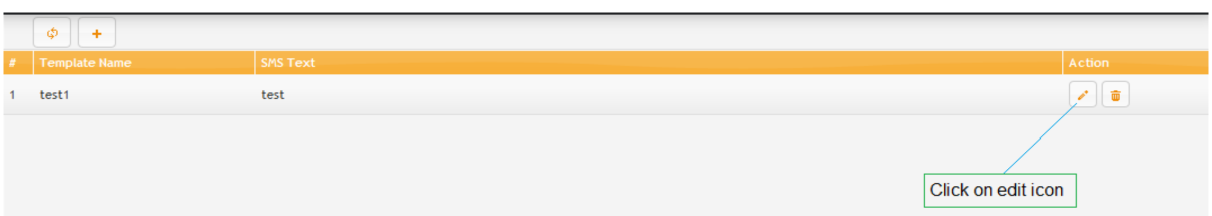
Step3: Fill up the appropriate data as shown in above picture

Step4: First enter the Template name and message

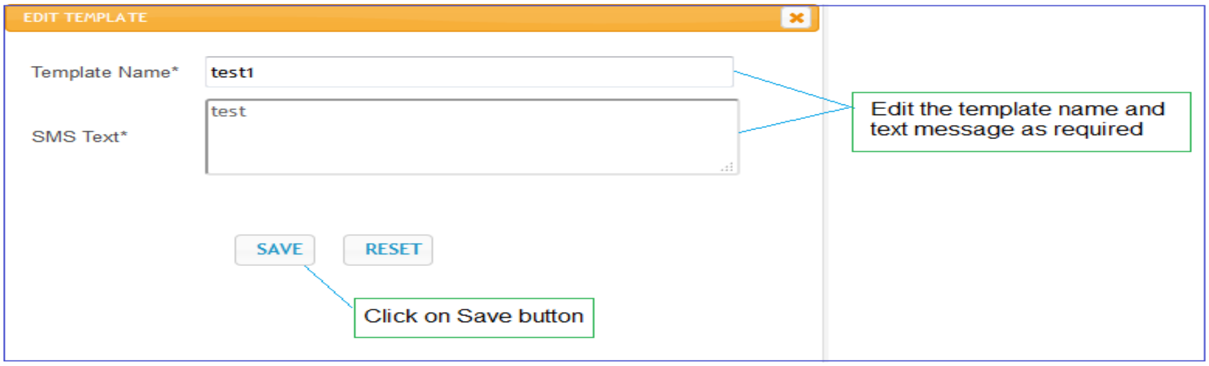
Step5: Then click on Save button to save the data

Edit SMS Template

Step1: When SMS template page shows as follows, then click on edit icon



Step2: After clicking on edit icon, “Edit SMS Template” dialog box open as follows:

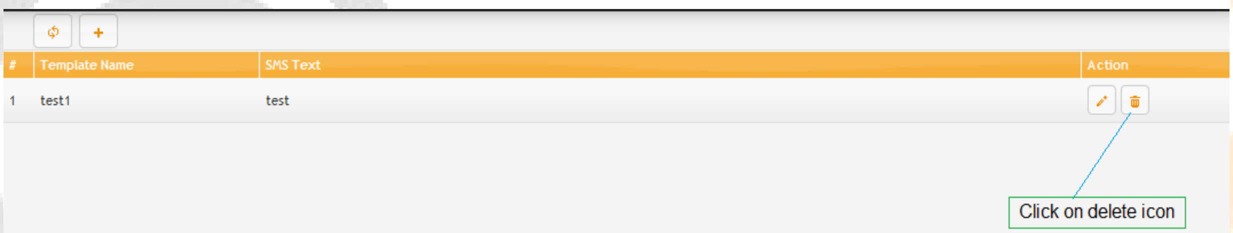


Step3: Edit option available on template name and message

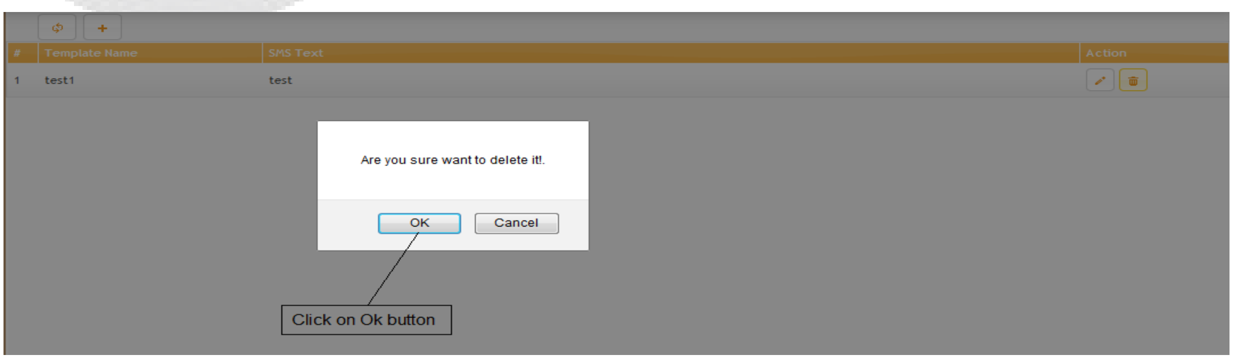
Step4: Edit the setting as required, and then click on Save button.

Delete SMS Template

Step1: When SMS template page shows as follows, then click on Delete icon



Step2: After clicking the delete icon, a popup message asking a confirmation for delete



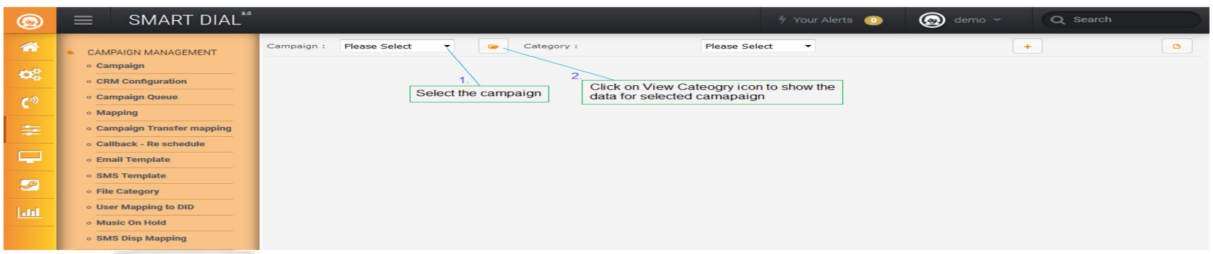
Step3: Now click on the “Ok” button, which will result removal of that data.

2.1.a.37 File Category

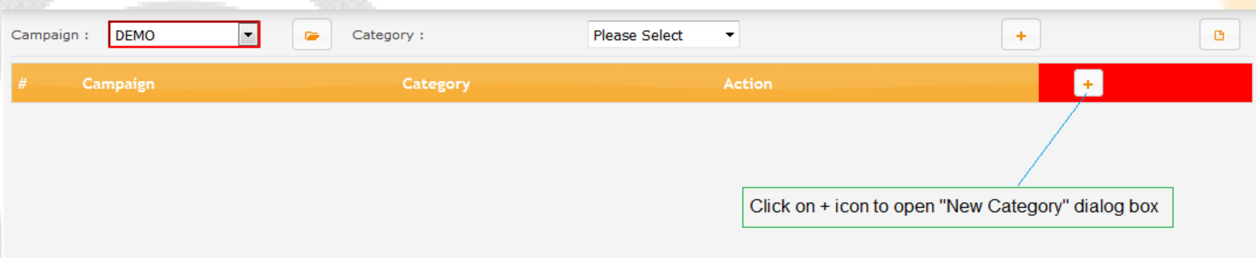
This module enables adding of audio files that are to be used in Agent Assisted IVR (AAIVR) feature for agent application.

Add New Category

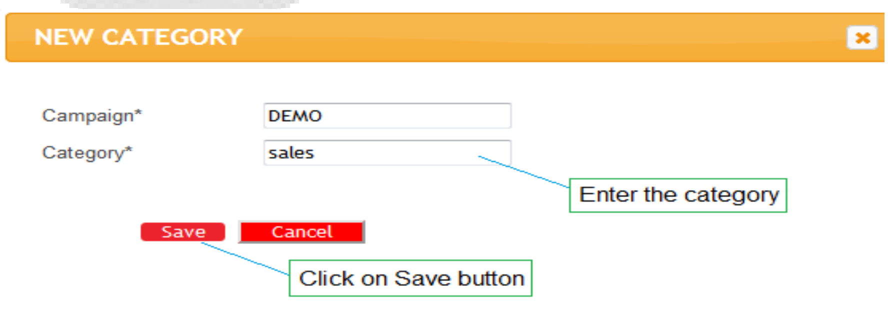
Step1: Go to “Operational Configuration” menu => Go to “Campaign Management” sub menu => Then click on “File Category” sub-sub menu to enable appearance of `File Category` Page



Step2: First Select the campaign, then click on View category icon to show the category



Step3: When category page shows as above, then click on + icon to open “New Category” dialog box as follows:



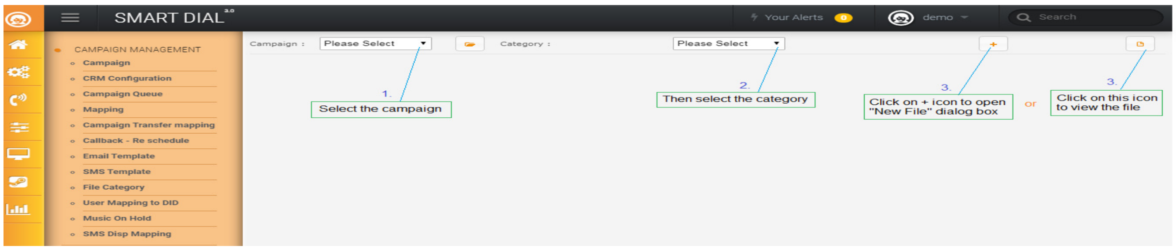
Step4: Enter the category name in category text box, then click on Save button

Step5: After clicking on Save button, created category shows on category page

Step6: Then click on cross “X” button to close the “New Category” dialog box

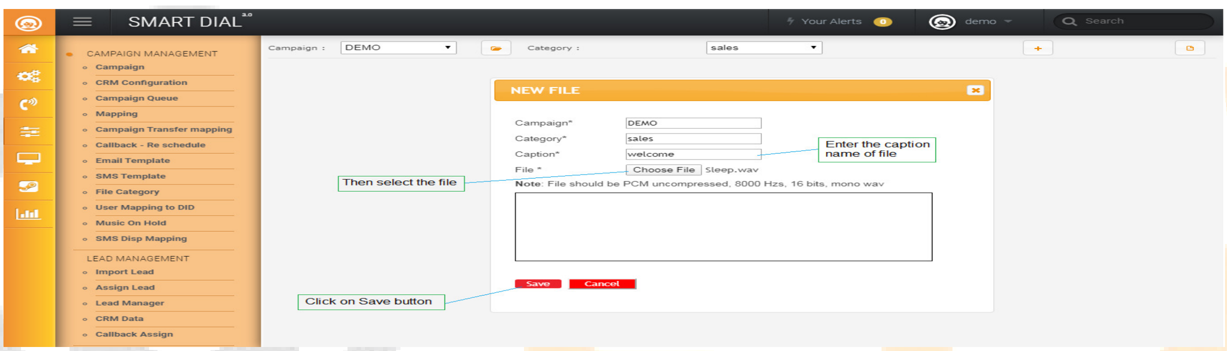
Add New File for Category

Step1: When “File Category” page appears, select the campaign name from campaign combo box



Step2: Then select the category name from category combo box

Step3: After that click on + icon to appear “New File” dialog box



Step4: Fill up the appropriate data as shown in above picture

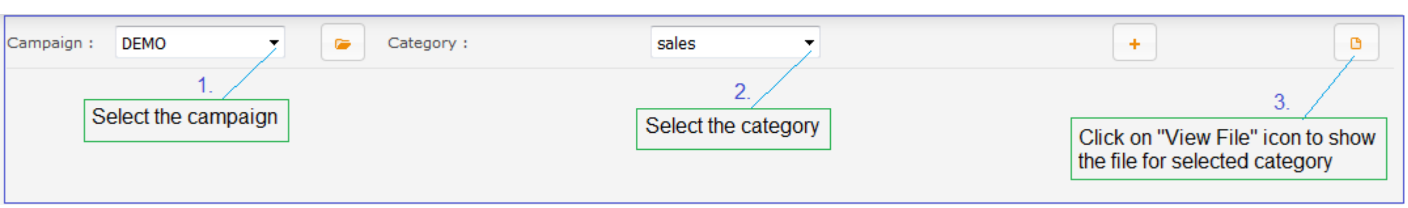
Step5: Enter the caption name in caption textbox

Step6: Then select the file through “choose file” option as it shown in picture

Step7: After that click on save button to upload the file

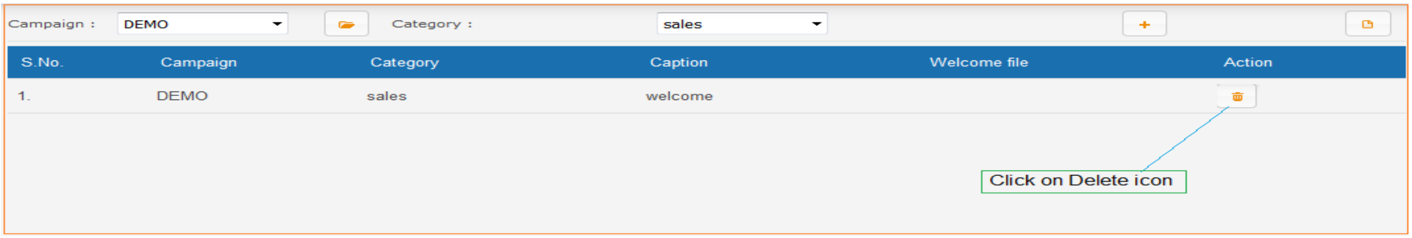
Delete File for Category

Step1: When “File Category” page appears, select the campaign name from campaign combo box



Step2: Then select the category name from category combo box

Step3: After that click on “View File” icon to show the file for selected category



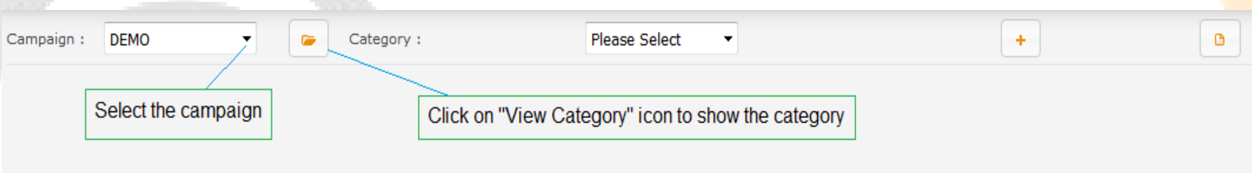
Step4: When category file show on “File Category” page then click on “Delete” icon

Step5: After clicking the delete icon, a popup message asking a confirmation for delete

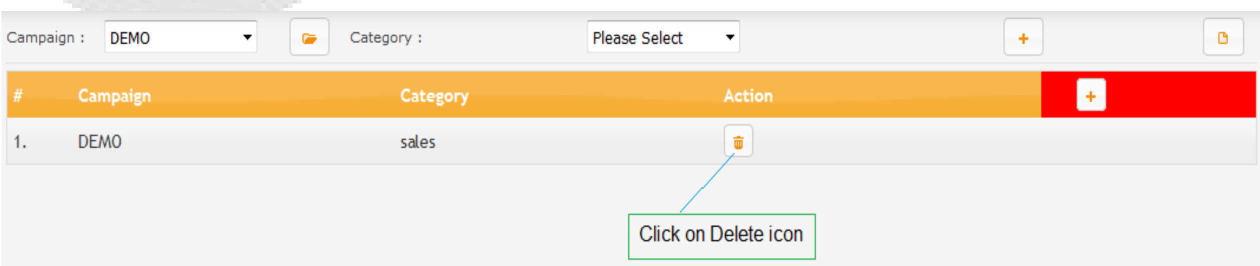
Step6: Now click on the “Ok” button, which will result removal of that data.

Delete Category

Step1: When “File Category” page appears, select the campaign name from campaign combo box



Step2: After that click on “View Category” icon to show the category for selected campaign



Step3: When category show on “File Category” page then click on “Delete” icon

Step4: After clicking the delete icon, a popup message asking a confirmation for delete

Step5: Now click on the “Ok” button, which will result removal of that data.

2.1.a.38 User Mapping To DID

This module used to map DID with the agent and that DID will be further used in Sticky DID campaign.

Step1: Go to “Operational Configuration” menu => Go to “Campaign Management” sub menu => Then click on “User Mapping To DID” sub-sub menu to enable appearance of `User Mapping To DID` Page

Step2: Now in the page choose a desired DID by clicking on it

Step3: Then click on + button for assigning user to a sticky DID based campaign

Step4: Select a desired sticky DID campaign in ‘Campaign Name’

Step5: Then select the concerned agent in ‘Agent Name’

Step6: At last click on save button to save the data.

Note:

1. Only one user can be mapped under a particular DID under a campaign, on attempt to other on the same did then it would reject as ‘already mapped’.

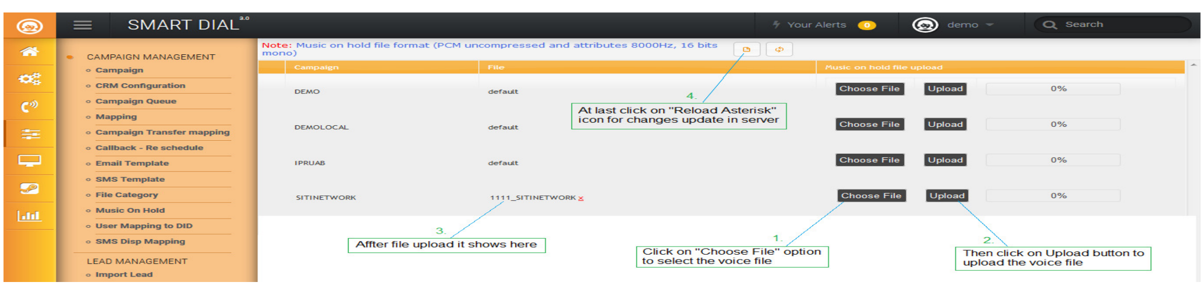
2.1.a.39 Music On Hold

This module used to set the music on hold file for campaign.

"Music On hold" file will be played on customer phone.

Add Customize Music On Hold File for the Campaign

Step1: Go to “Operational Configuration” menu => Go to “Campaign Management” sub menu => Then click on “Music On Hold” sub-sub menu to enable appearance of `Music On Hold` Page



Step2: Now in the page, click on “Choose File” option to select the voice file

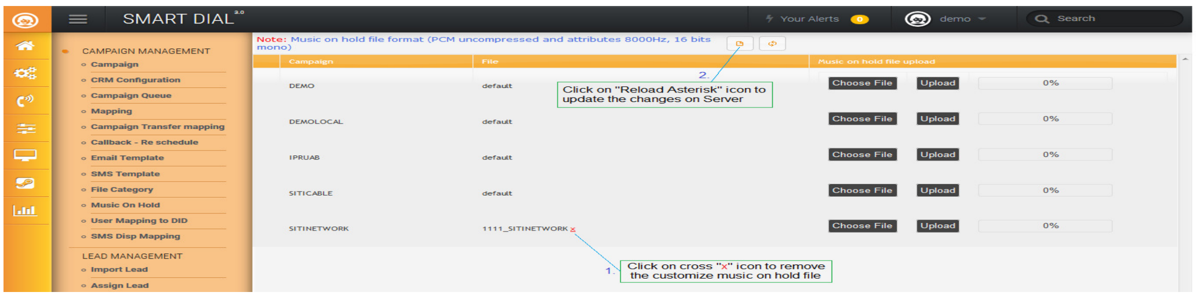
Step3: Upload a voice file (PCM uncompressed 8000HZ, 16 bits mono) by clicking on Upload button

Step4: When uploaded file shows in File column as shown in picture

Step5: Then click on “Reload Asterisk” button to upload the changes on Server.

Remove Customize Music On Hold File for the Campaign

Step1: When uploaded file shows in File column as shown in picture



Step2: Then click on delete “x” icon to delete the voice file

Step3: After clicking the delete icon, a popup message asking a confirmation for delete with Ok and Cancel button

Step4: Now click on the “Ok” button, which will result removal of the customize voice file

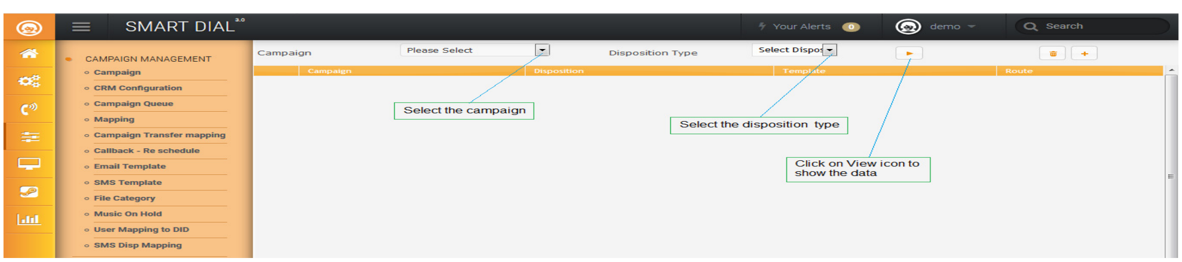
Step5: Then click on “Reload Asterisk” button to upload the changes on Server.

2.1.a.40 SMS Disp Mapping

This module used to map the sms template with campaign and agent/dialer/No disposition.

View Disposition Mapping with SMS Template:

Step1: Go to “Operational Configuration” menu => Go to “Campaign Management” sub menu => Then click on “SMS Disp Mapping” sub-sub menu to enable appearance of `SMS Disp Mapping` Page



Step2: First select the campaign from Campaign combo box

Step3: Then select the Agent/Dialer Disposition from disposition type

Step4: At last click on View icon to display the data on SMS Disp Mapping page

Add Disposition Mapping with SMS Template:

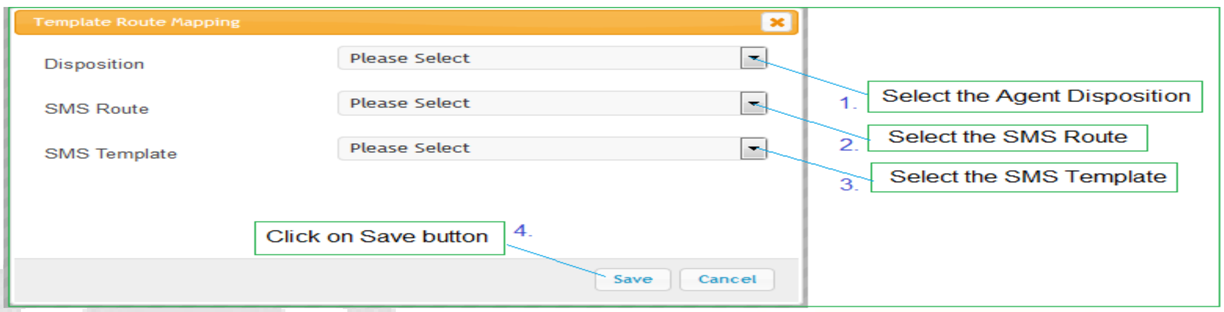
Step1: First select the Campaign from campaign combo box

Step2: Then select the Agent/Dialer Disposition from disposition type

Step3: After that click on Plus icon to open the “Template Route Mapping” dialog box

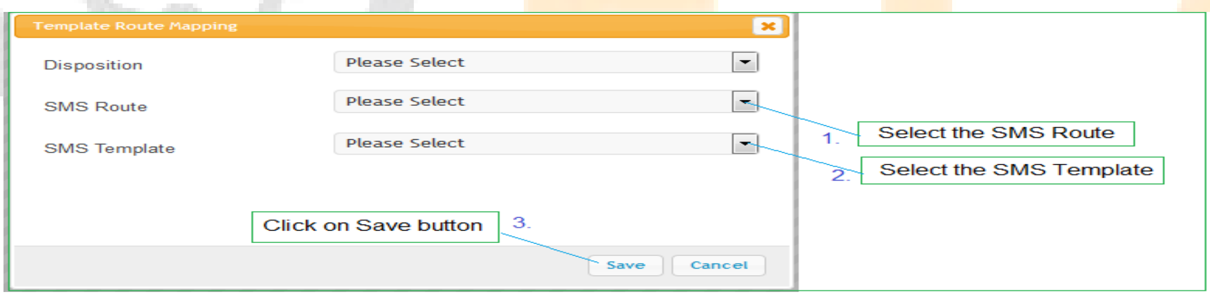
Step4: When you select the Agent Disposition then two case arise

Case1 => Map Route with Agent Disposition and SMS template



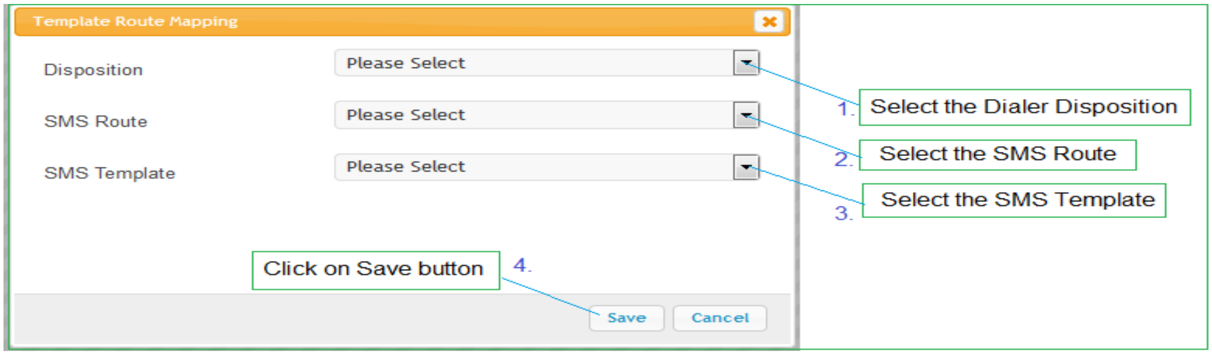
Step4.1: Select the Agent Disposition

Case2 => Map Route with SMS Template



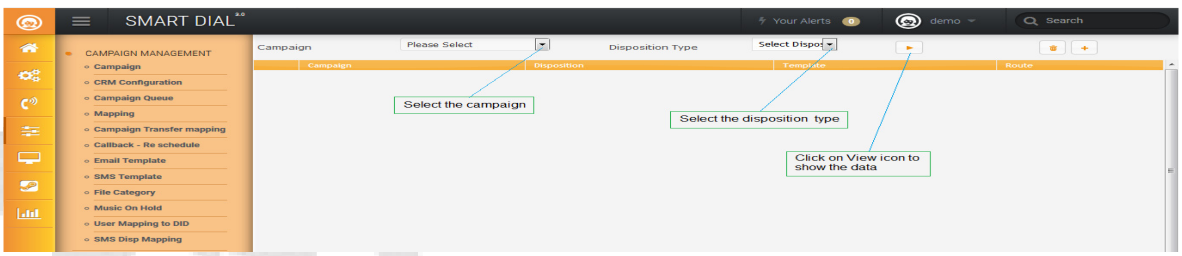
Step4: When you select the Dialer Disposition then only one case arise

Case1 => Map Route with Dialer Disposition and template



Delete Disposition Mapping with SMS Template:

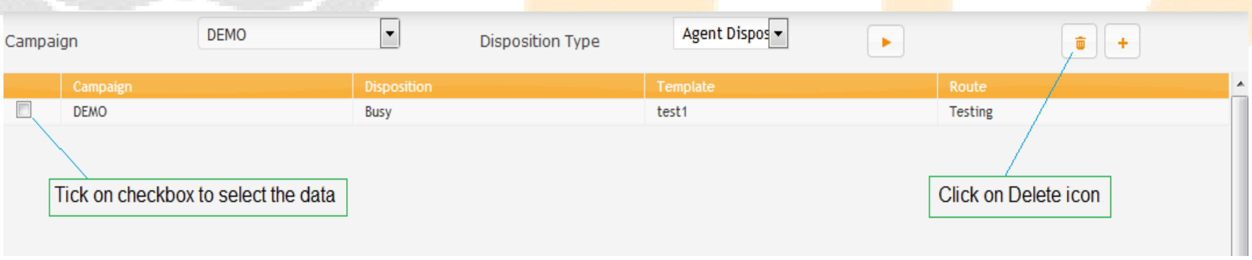
Step1: Go to "Operational Configuration" menu => Go to "Campaign Management" sub menu => Then click on "SMS Disp Mapping" sub-sub menu to enable appearance of `SMS Disp Mapping` Page



Step2: First select the campaign from Campaign combo box

Step3: Then select the Agent/Dialer Disposition from disposition type

Step4: At last click on View icon to display the data on SMS Disp Mapping page



Step5: After that select the data which you want to delete

Step6: Then click on Delete icon which is before the add icon

Step7: After clicking on delete icon message shows " Delete selected SMS Route ?."

Step8: At last click on Ok button to delete it.

Lead Management

Lead Management used to import lead, activate/deactivate lead, rechurn lead, assign data to agent, and assign callback to agent and so on.

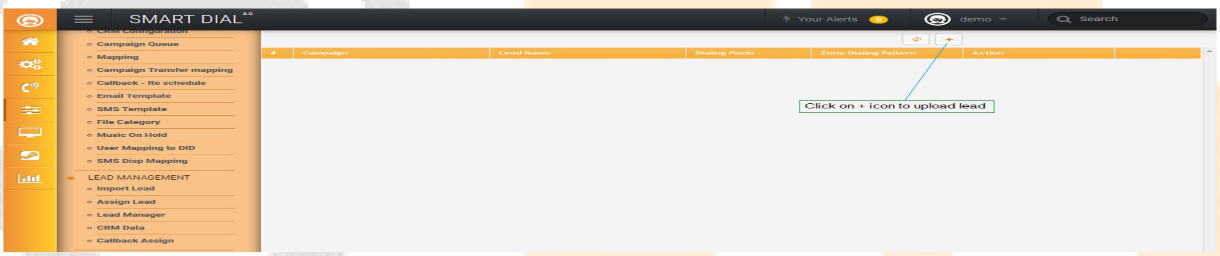
Lead Management divided into following modules:

- Import Lead
- Assign Lead
- Lead Manager
- CRM Data
- Callback Assign

2.1.a.41 Import Lead

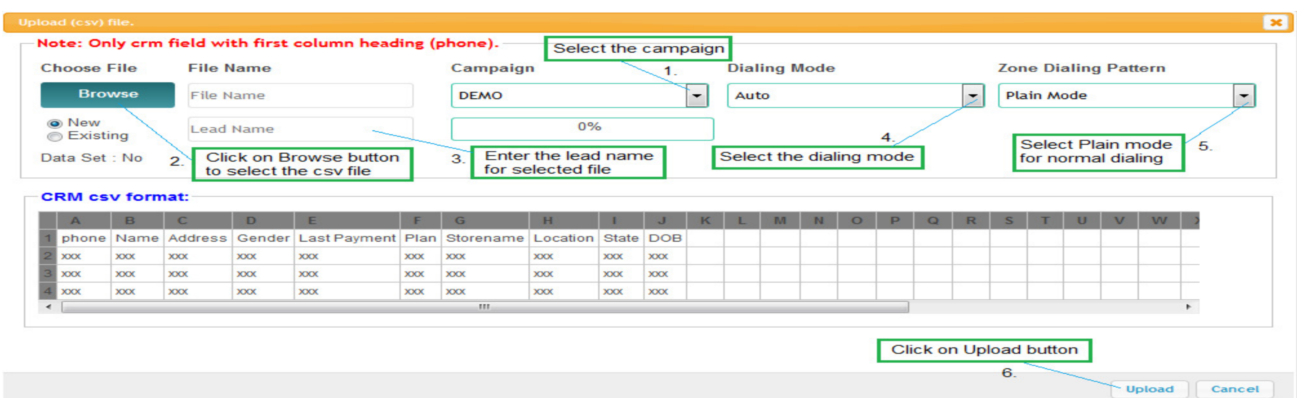
This module used to import data into standard lead fields.

Step1: Go to “Operational Configuration” menu => Go to “Lead Management” sub menu => Then click on “Import Lead” sub-sub menu to enable appearance of `Import Lead` Page



Step2: First click on + icon to open the “Upload file” dialog box

Step3: “Upload File” dialog box appear as follows:

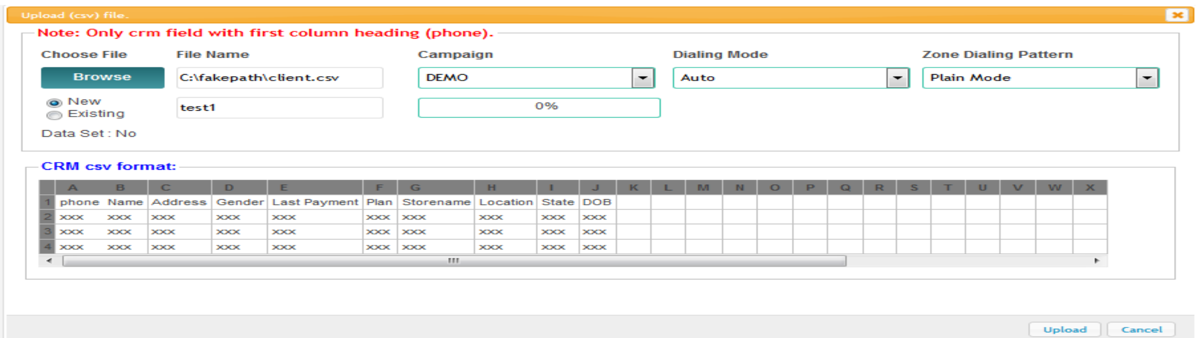


Step4: First select the campaign then user is supposed to create a csv file via excel sheet in same format according to campaign CRM mentioned in the dialog box

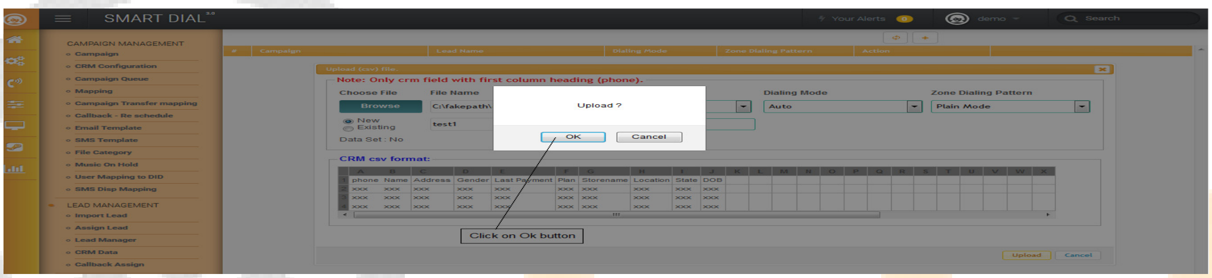
Step5: Once the csv file have been created, it is to be uploaded in via the dialog box, to do it click on the “Browse” button, which will enable another dialog box to select the csv file

Step6: Once file selected then enter the lead name for csv file as it shown in picture

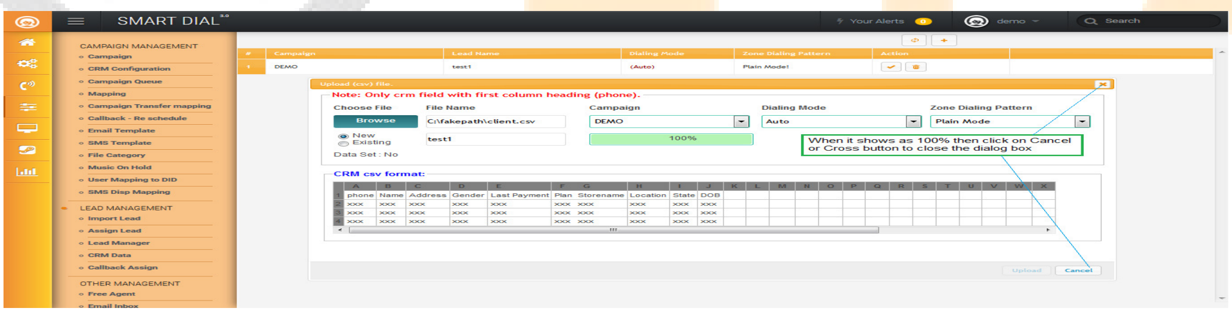
Step7: After that select the dialing mode and zone dialing pattern, then click on upload button



Step8: After click on upload button, a popup window will ask a confirmation message.

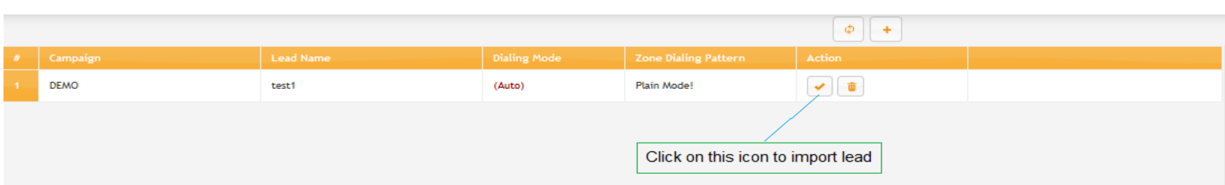


Step9: Once ok button is clicked, then percentage progress bar shows as 100%



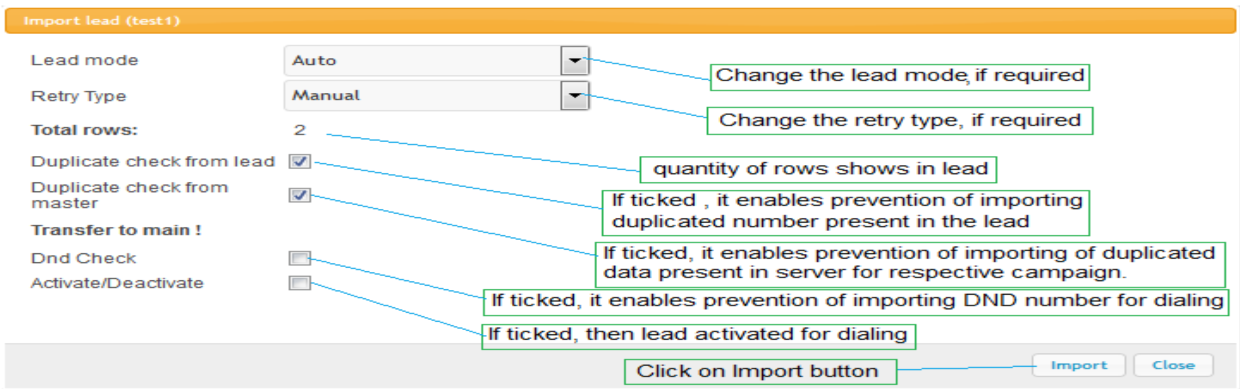
Step10: Then click on Cancel or Cross button to close the dialog box

Step11: Now in the import lead page, it is evident that the lead is uploaded. Now to be proceed with importing of the uploaded lead



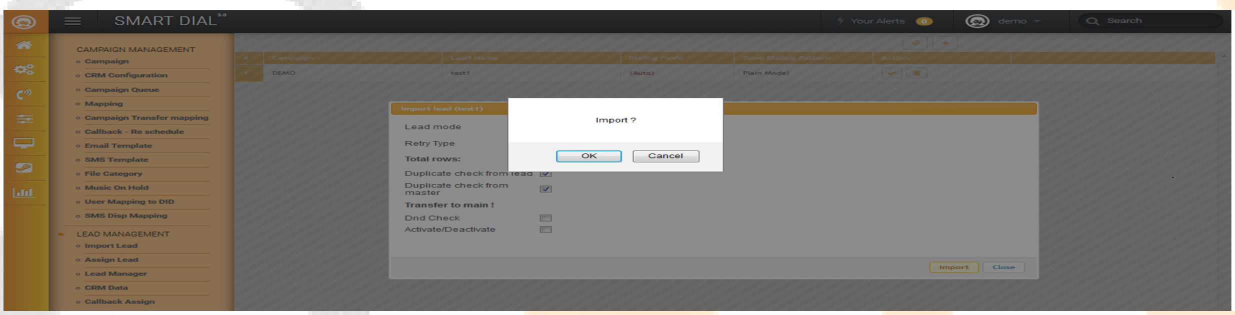
Step12: Click on tick icon to open import lead dialog box

Step13: "Import Lead" dialog box appear as follows:



Step14: Select the field as shown in above picture

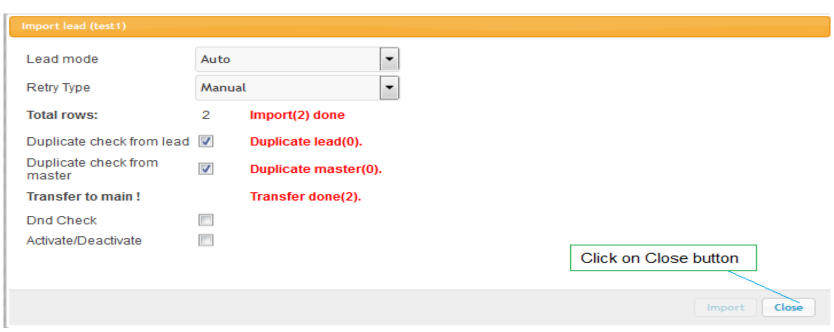
Step15: At last click on Import button



Step16: After click on Import button, a popup window will ask a confirmation message.

Step17: Then click on Ok button

Step18: After click on ok button acknowledgement show as follows:



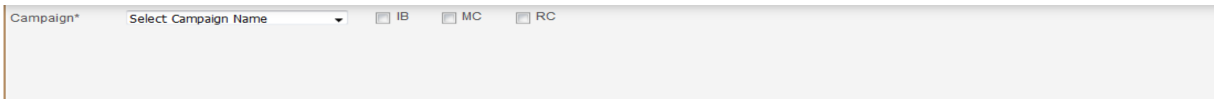
Step19: At last click on Close button to close the Import dialog box

2.1.a.42 Assign Lead

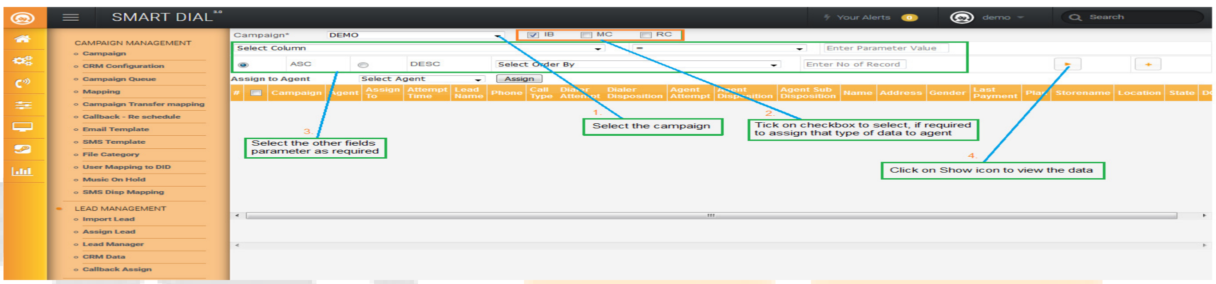
Assign lead mechanism facilitate admin user to assign newly/old lead data to agent.

It has enhanced feature of filtering lead in form of each and every details ranging from name to other crm fields.

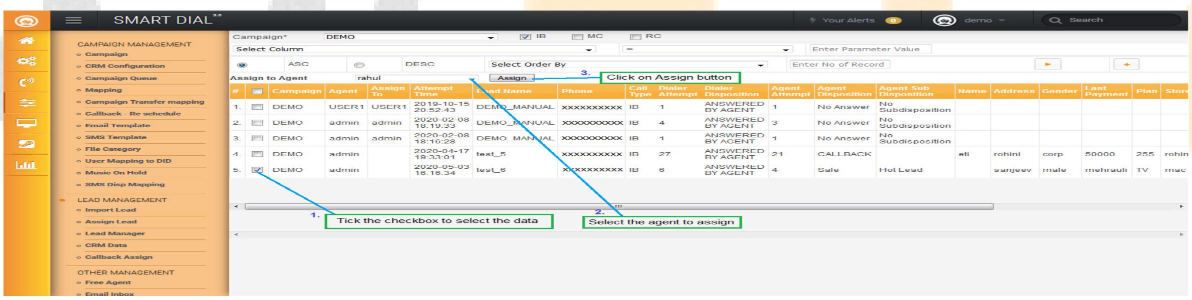
Step1: Go to “Operational Configuration” menu => Go to “Lead Management” sub menu => Then click on “Assign Lead” sub-sub menu to enable appearance of `Assign Lead` Page



Step2: Now select the desired campaign and other search criteria



Step3: Then click on Show icon to view the data

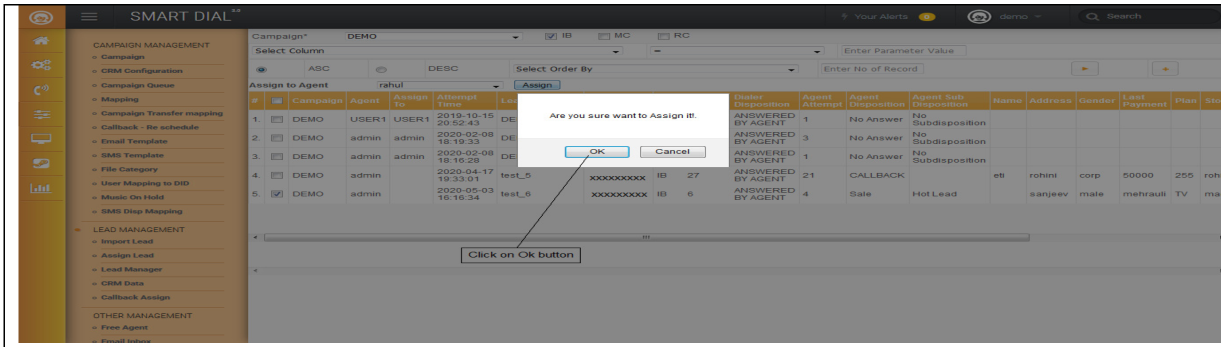


Step4: First tick the checkbox to select the data

Step5: Then select the agent from “Assign to Agent” combo box

Step6: Finally click on “Assign” button to assign the selected data

Step7: After clicking on assign button, a popup message shows as “Are you sure want to Assign it!”

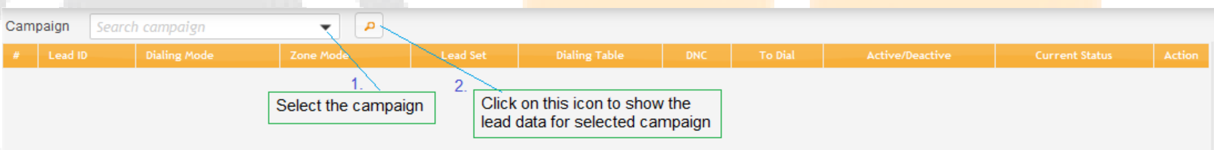


Step8: At last click on Ok button to assign the data and close the popup message.

2.1.a.43 Lead Manager

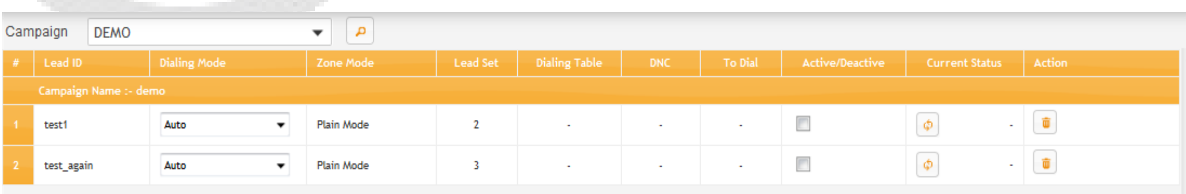
This module enables manual alteration of mode, activate/deactivate, refresh and deleting of existing active leads.

Step1: Go to “Operational Configuration” menu => Go to “Lead Management” sub menu => Then click on “Lead Manager” sub-sub menu to enable appearance of `Lead Manager` Page



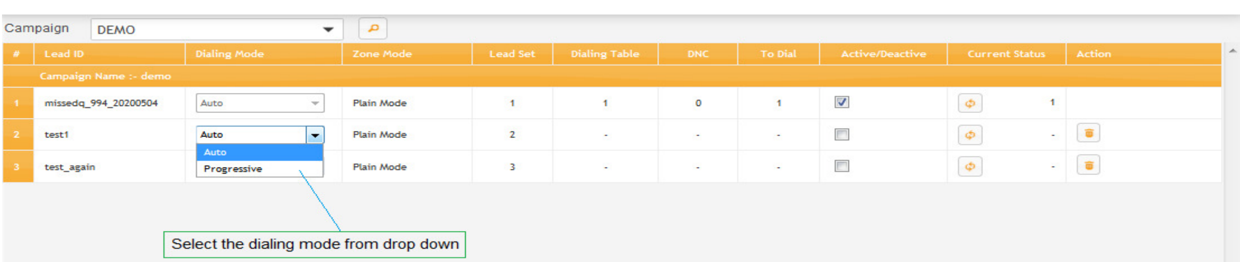
Step2: First select the campaign from campaign combo box

Step3: Then click on search icon to show the lead data for selected campaign

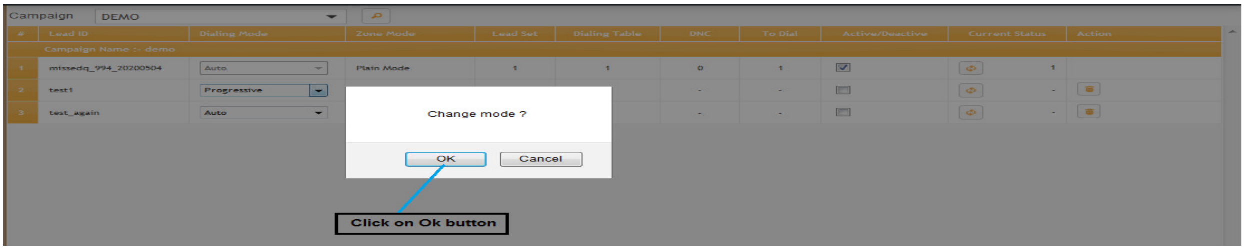


<u>Alteration of mode for existing Lead:</u>

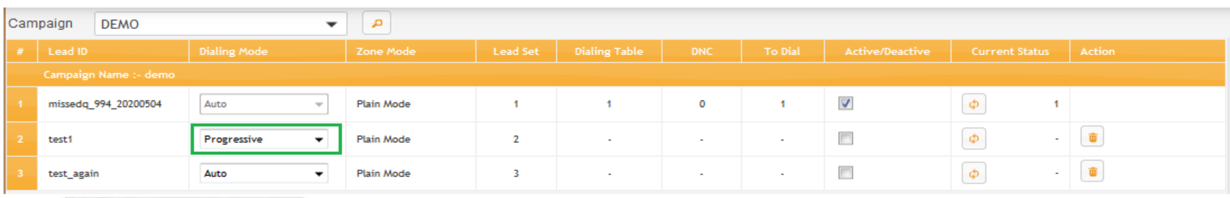
Step4: Select the dialing mode from drop down



Step5: After selecting the mode it will pop up a message as “Change mode?”, then click on Ok button



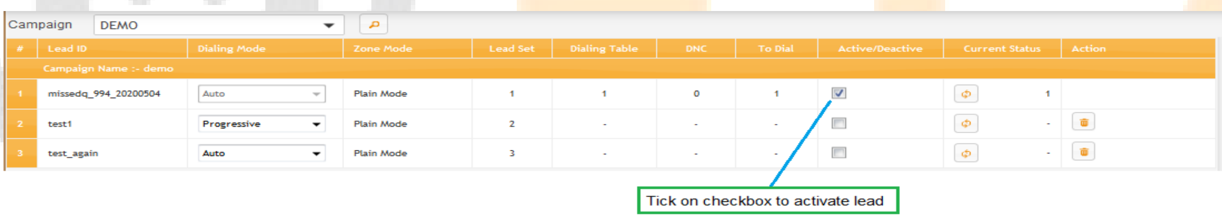
Step6: After clicking OK button the mode will be altered to progressive.



Note: If active checkbox is ticked then the dialing mode alteration section to be sealed.

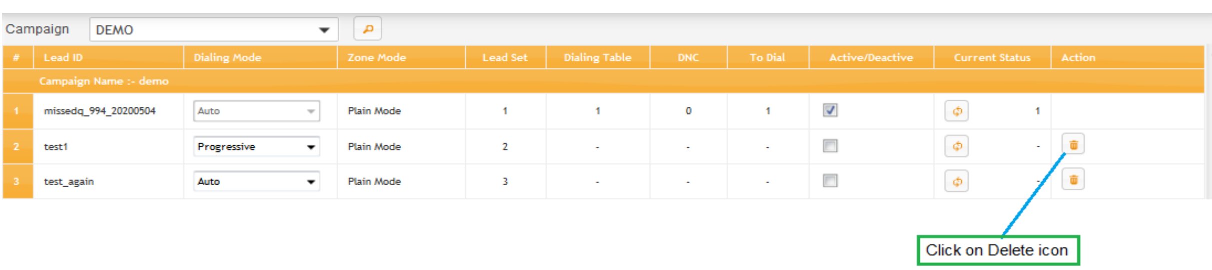
Activate Lead:

Step4: To activate lead, tick on checkbox of Activate/Deactivate tuple

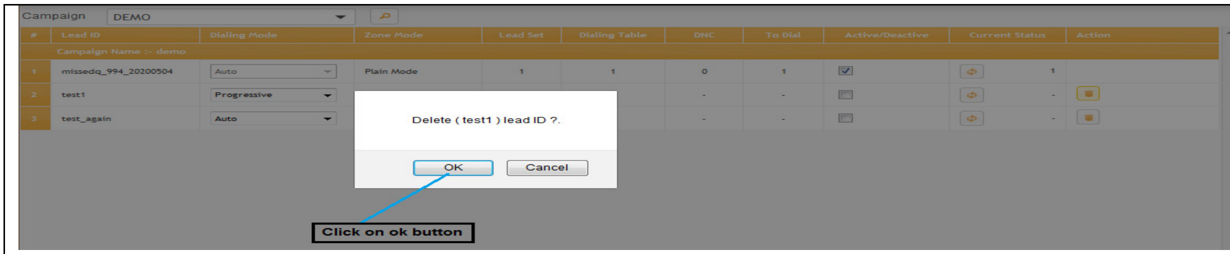


Delete Lead:

Step4: To delete lead, click on Delete icon as shown in picture



Step5: After clicking the delete icon, a popup message asking a confirmation for delete



Step6: Now click on the “Ok” button, which will result removal of that data.

2.1.a.44 CRM Data

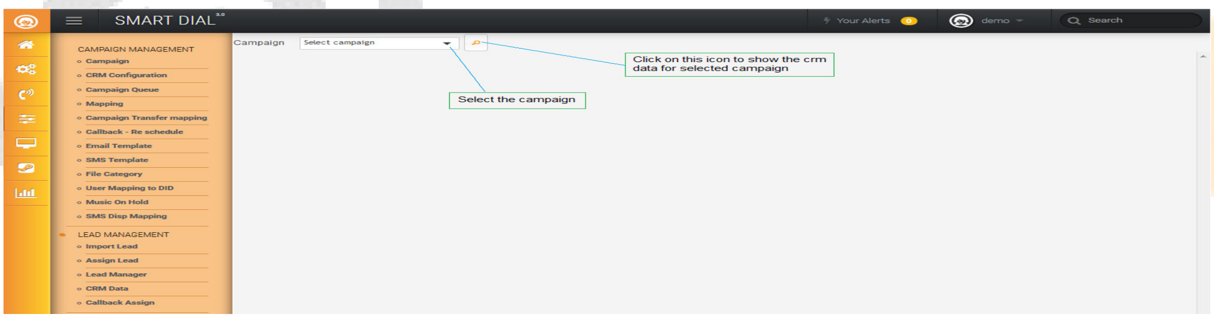
This module facilitates reloading the leads based on agent/dialer dispositions for outbound calls.

Addition features are:

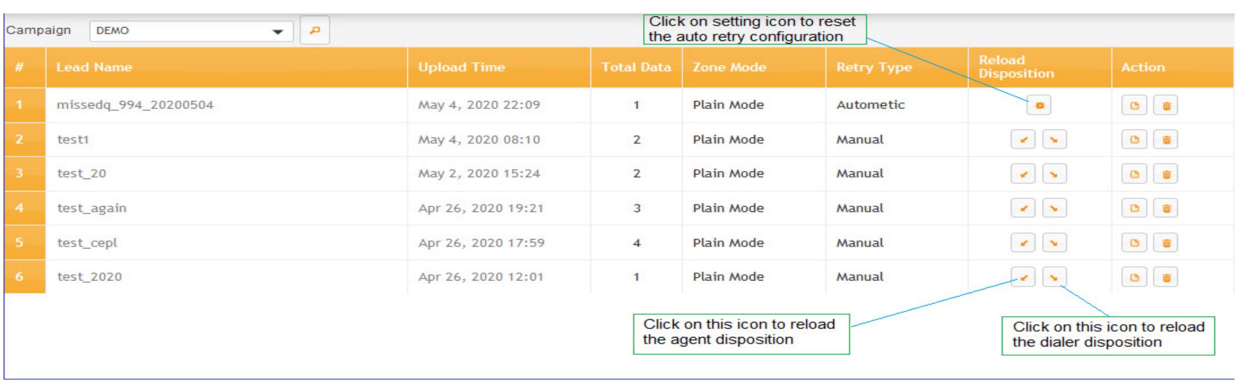
=> CRM data export

=> Delete CRM data with lead

Step1: Go to “Operational Configuration” menu => Go to “Lead Management” sub menu => Then click on “CRM Data” sub-sub menu to enable appearance of `Lead Manager` Page



Step2: First select the campaign then click on Search icon to show the CRM data for selected campaign

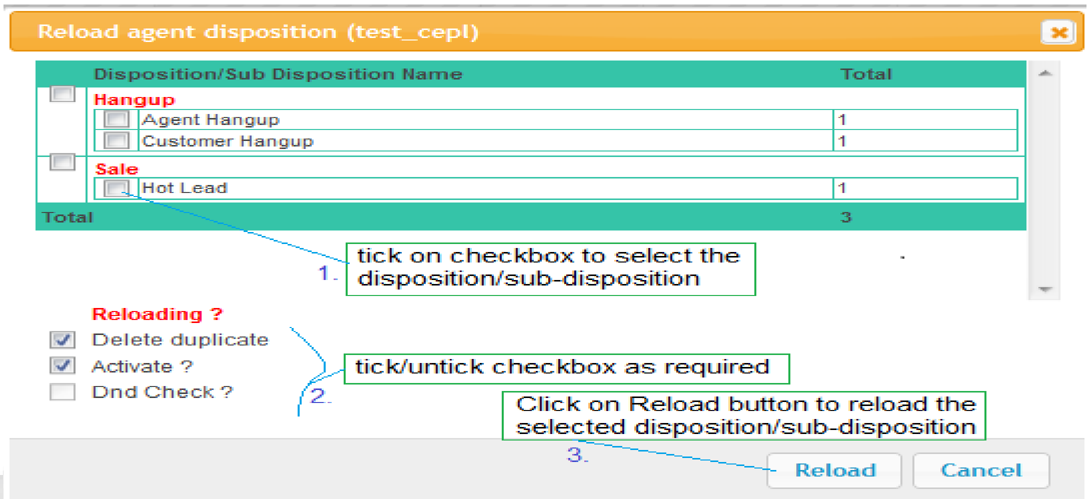


#	Lead Name	Upload Time	Total Data	Zone Mode	Retry Type	Reload Disposition	Action
1	missedq_994_20200504	May 4, 2020 22:09	1	Plain Mode	Autometic		
2	test1	May 4, 2020 08:10	2	Plain Mode	Manual		
3	test_20	May 2, 2020 15:24	2	Plain Mode	Manual		
4	test_again	Apr 26, 2020 19:21	3	Plain Mode	Manual		
5	test_cepl	Apr 26, 2020 17:59	4	Plain Mode	Manual		
6	test_2020	Apr 26, 2020 12:01	1	Plain Mode	Manual		

Reload Agent Disposition

Step1: When lead views on the CRM data page as it shown in above picture

Step2: Then click on this icon to open the "Reload agent disposition" dialog box



Step3: First tick on checkboxes to select the disposition/sub-disposition

Step4: Then click on "Reload" button to reload the selected disposition/sub-disposition

Step5: After clicking on reload button, then a pop message asking a confirmation as "Reload lead ?" with Ok and Cancel button

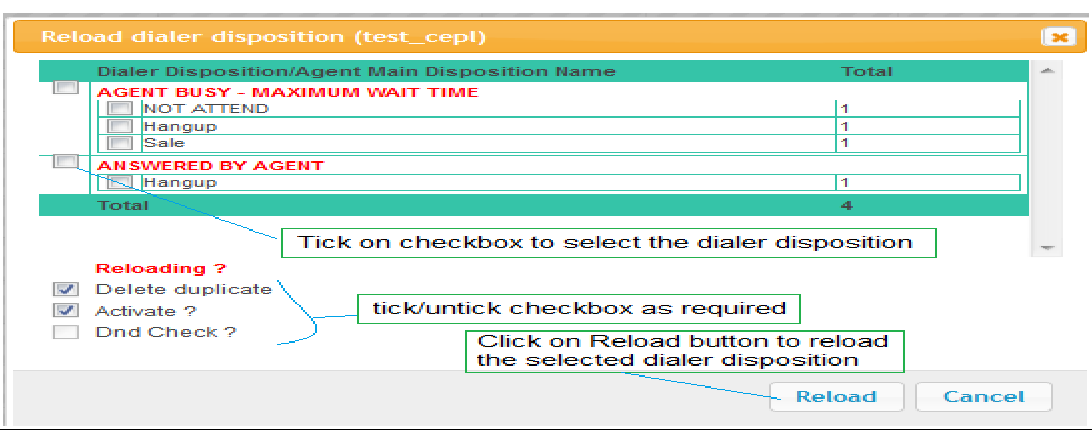
Step6: Then click on "Ok" button to give the confirmation

Step7: After clicking on Ok button, response shows for the data reload on "Reload agent disposition" dialog box

Reload Dialer Disposition

Step1: When lead views on the CRM data page as it shown in above picture

Step2: Then click on this icon to open the "Reload dialer disposition" dialog box



Step3: First tick on checkboxes to select the dialer disposition

Step4: Then click on "Reload" button to reload the selected dialer disposition

Step5: After clicking on reload button, then a pop message asking a confirmation as "Reload lead ?" with Ok and Cancel button

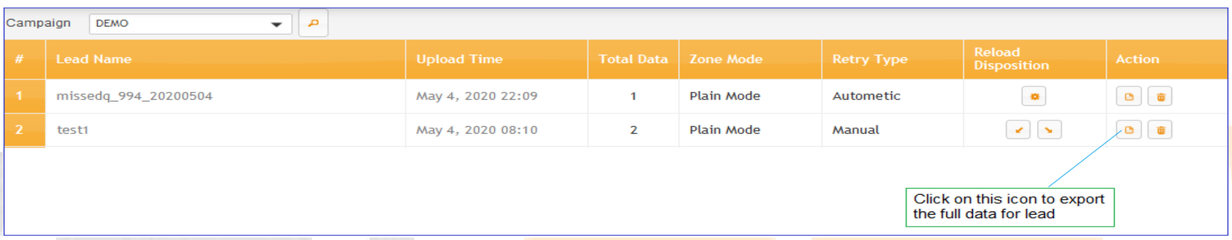
Step6: Then click on "Ok" button to give the confirmation

Step7: After clicking on Ok button, response shows for the data reload on "Reload agent disposition" dialog box

Export CRM Data

Step1: When lead views on the CRM data page as it shown in picture

Step2: Then click on this icon to export the full data of lead



Step3: After clicking on export icon, a pop message asking a confirmation as "Export Lead (xxxxx)" with Ok and Cancel button

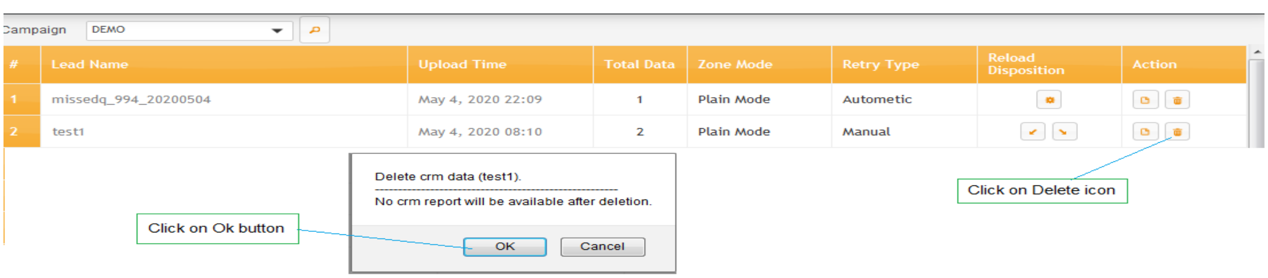
Step4: Then click on "Ok" button

Step5: After clicking on Ok button, it gives the option to open/save the csv fle

Delete CRM Data

Step1: When lead views on the CRM data page as it shown in above picture

Step2: Then click on delete icon to delete the crm data with lead



Step3: After clicking on delete icon, a pop message asking a confirmation as "Delete CRM Data (xxxxx)" with Ok and Cancel button

Step4: Then click on "Ok" button

Step5: After clicking on Ok button, lead and it's data remove from the system.

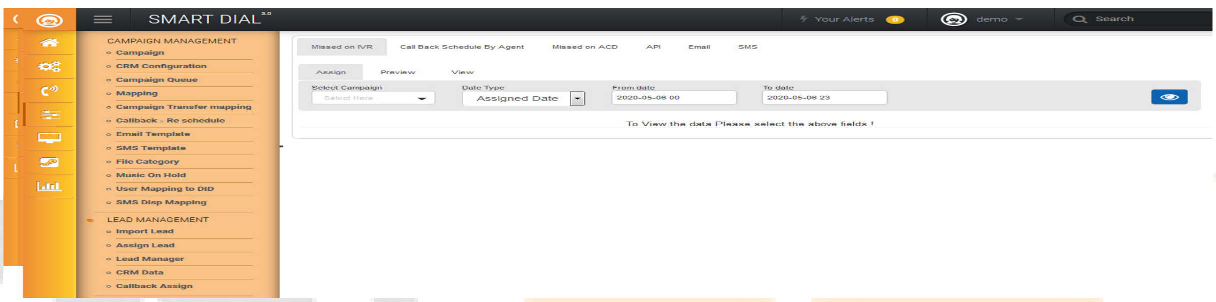
2.1.a.45 Callback Assign

This mechanism enables assigning/viewing of scheduled callbacks which are scheduled by agent, received via email, missed on IVR/ACD and API.

Note: If Lead source created for a campaign and that lead stores in selected as callback then only data shows in Callback Assign page.

To open callback assign sub-sub menu:

Step1: Go to "Operational Configuration" menu => Go to "Lead Management" sub menu => Then click on "Callback Assign" sub-sub menu to enable appearance of "Callback Assign` Page



The callback assign page consists of following Tab

- Assign Tab – This part facilitates admin user to manually assign callbacks to agent.

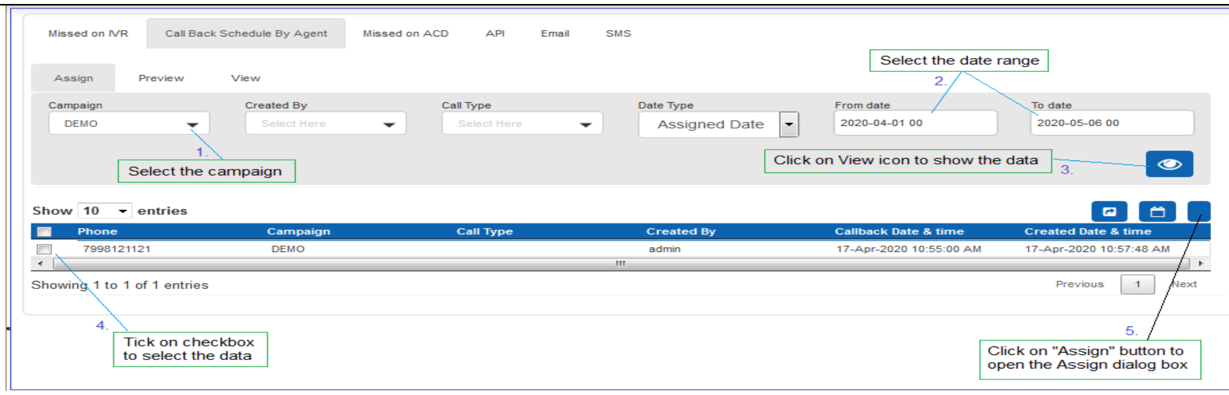
  If lead source created for source type (API/Email/Missed On IVR/Missed On ACD/Callback scheduled by Agent) and fields are selected as follows:

  Lead stores in – Callback

  Assign Policy - Manual

  If data comes for any source, then that data shows in that source type of Assign Tab.

  Step1: Consider the steps as above to open the callback assign page.

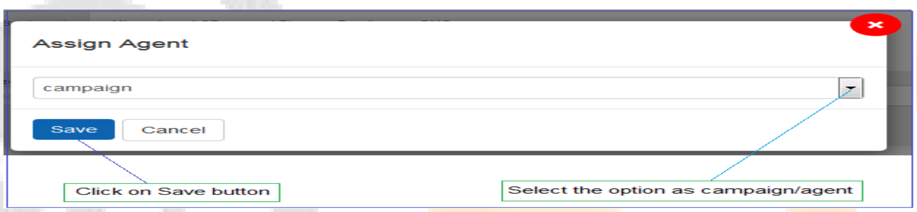


Step2: First select the campaign and other search criteria option

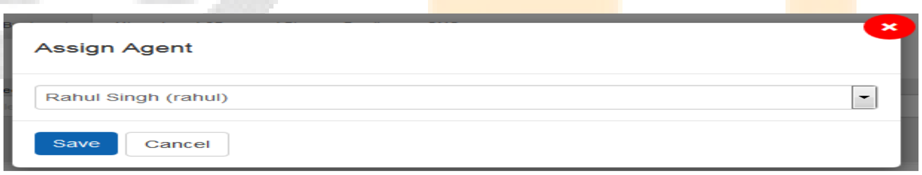
Step3: Then click on View icon to show the data on panel

Step4: When data view then tick on checkboxes to select it

Step 5: After that click on Assign button to open the “Assign Agent” dialog box



Step6: Select the option as campaign/agent, then click on Save button



Step7: After clicking on “Save” button that data move from assign tab to preview tab.

⇨ **Preview Tab** - This part facilitates admin user to preview assigned callback.

If lead source created for Source Type (API/Email/Missed On IVR/Missed On ACD/Callback scheduled by Agent) and fields are selected as follows:

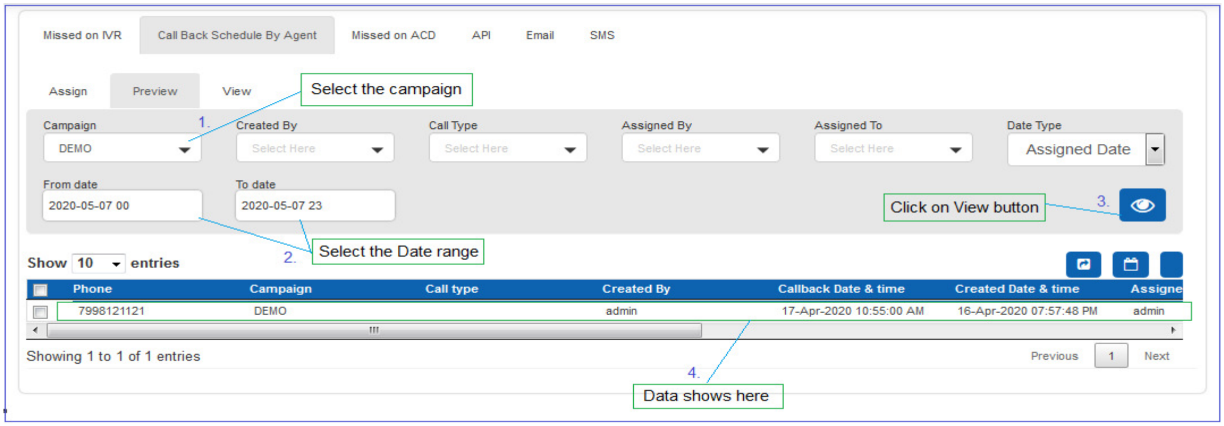
Lead stores in – Callback

Assign Policy - Automatic

If data comes for any source, then that data shows in that source type of Preview Tab.

Data which assigned (scheduled) from “Assign” tab also shows in preview tab.

Step1: Consider the steps as above to open the callback assign page.



Step2: First select the campaign and other search criteria option

Step3: Then click on View icon to show the data on panel

⇨ **View Tab** - This part facilitates admin user to view the callback in View tab.

Same data view to the entire user in callback tab for agent application.

Users see the data and dial that data by double clicking.

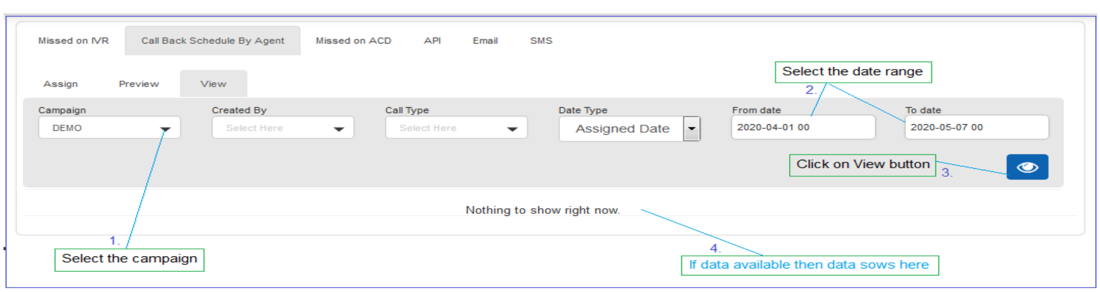
If lead source created for Source Type (API/Email/Missed On IVR/Missed On ACD/Callback scheduled by Agent) and fields are selected as follows:

Lead stores in – Callback

Assign Policy - View

If data comes for any source, then that data shows in that source type of View Tab.

Step1: Consider the steps as above to open the callback assign page.



Step2: First select the campaign and other search criteria option

Step3: Then click on View icon to show the data on panel

Other Management

This module consists of Free Agent and Email Inbox.

2.1.a.46 Free Agent

This sub module used to free agent, if any user stuck while login in application.

When we login to agent using user id named ‘rahul’ , but intermittently the agent gets hangs/Not responding , then we close the agent application and attempt to relogin using same credentials, on attempt to do so it blocks the access to agent by showing message "Already login from "XXX.XXX.XXX.XXX" with SIP ID "XXXXX". Please contact Admin...!"

To fix up this issue the mechanism of free agent is followed as:

Step1: Go to Other management of Operational Configuration => Click free Agent sub-sub menu.

Step2: Now in the free agent page it shows the details of the stuck agent

Step3: Then click on ‘free’ button, it will opt to free the campaign.

Step4: Click on “OK” button

Step5: After clicking on ok button then that user can easily login in agent application.

2.1.a.47 Email Inbox

This mechanism facilitates viewing and assigning of incoming mails received from customers to an agent.

Step1: Go to "Operational Configuration" menu => Then click on "Other Management" sub menu => At last click on "Email Inbox" sub-sub menu

Step2: Email Inbox Page shows as follows:

Step3: Then search the data and assign that to agent as follows:

Step4: Select the campaign from campaign drop down selection

Step5: After that search the data according to date range or click on Inbox count link to view the data

Step6: Then click on Assign Label to assign the data to agent

Step7:After clicking on Assign page, a pop-up window open for the data assigning to agent

Step8: Then select the Agent and click on Save button to assign the data to selected agent

Monitoring

This module consists of User Status and Customer Queue.

2.1.a.48 User Status

This sub module used for monitoring the agent through Client Panel.

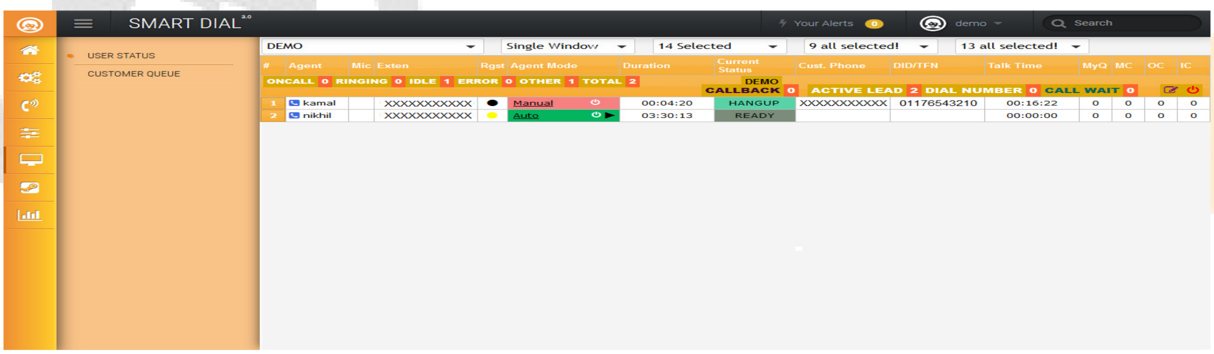
Addition features are:

(i) Change Mode of User

(ii) Logout User

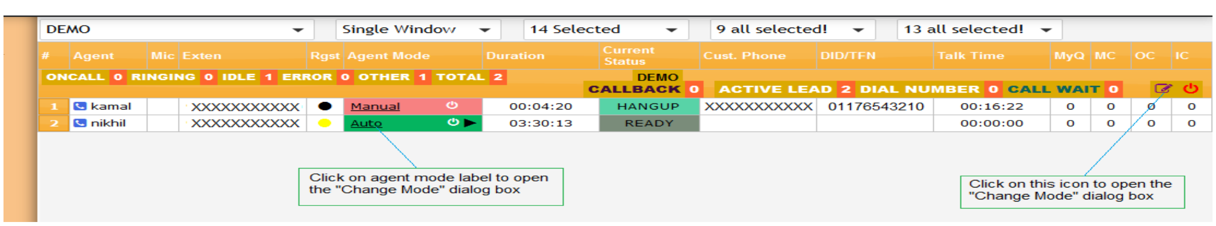
Step1: Go to "Monitoring" menu => Then click on "User Status" sub menu

Step2: User Status Page shows as follows:



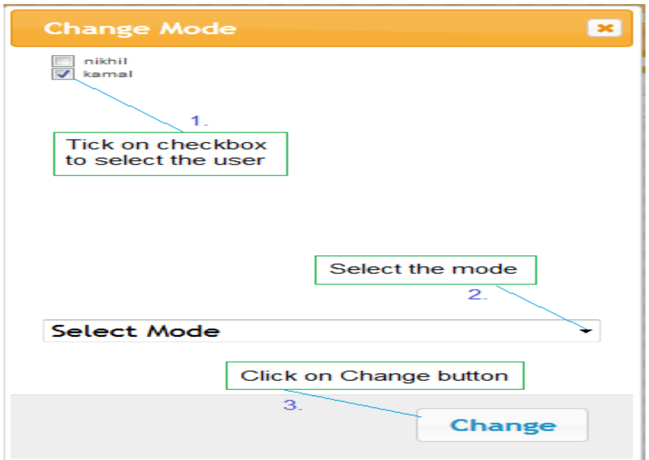
<u>Change Mode of User</u>

Step1: When user shows on User Status page as follows:



Step2: Then click on “Agent Mode” label or “Change Mode” icon to open the change mode dialog box

Step3: “Change Mode” dialog box appears as follows:



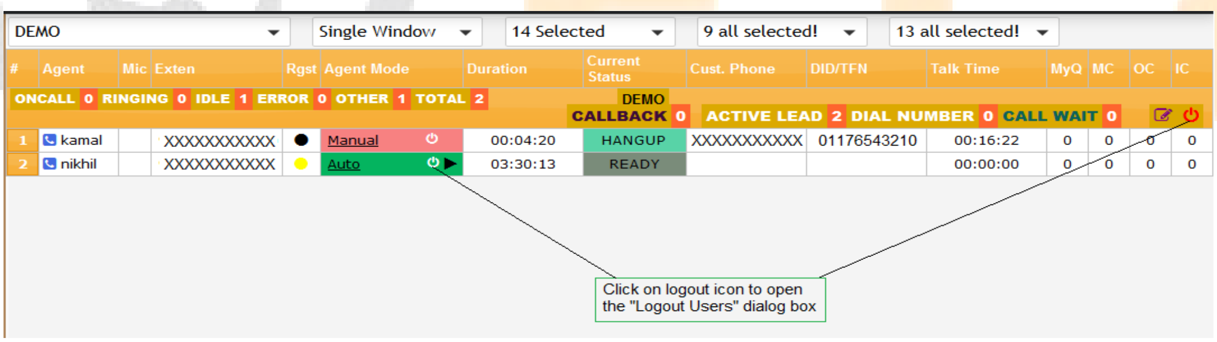
Step4: First tick on Checkboxes to select the users, then select the mode from drop down option

Step5: Click on change button, then it will opt for changing, then click Ok

Step6: After clicking on ‘OK’ button the mode will be altered.

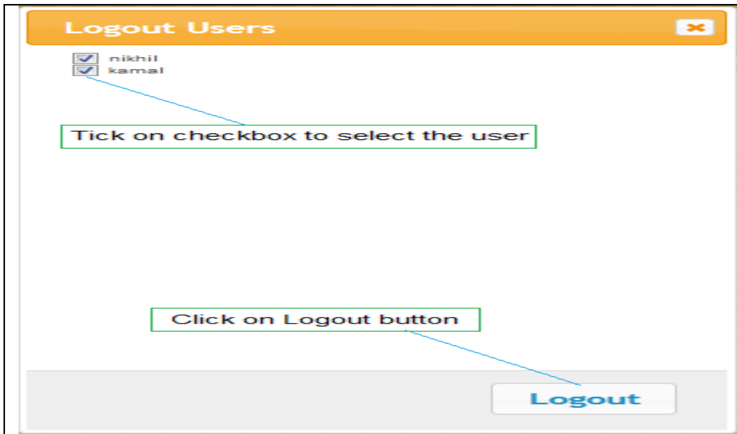
Logout User

Step1: When user shows on User Status page as follows:



Step2: Then click on “logout” icon to open the `Logout Users` dialog box

Step3: “Logout Users” dialog box appears as follows:



Step4: First tick on Checkboxes to select the users

Step5: Then click on “Logout” button, then it will opt for logout, then click Ok

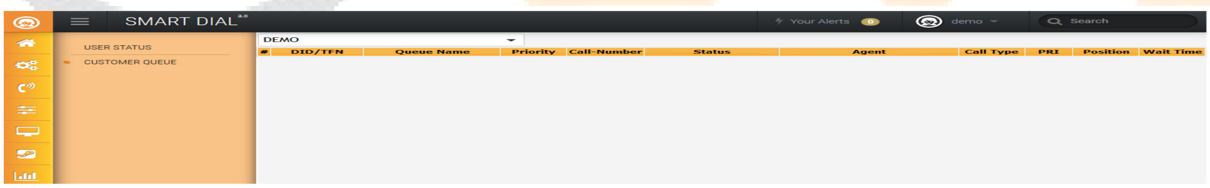
Step6: After clicking on ‘OK’ button user logout from the application.

2.1.a.49 Customer Queue

This module facilitates, tracking the progress of inbound and outbound calls corresponding with a customer.

Step1: Go to "Monitoring" menu => Then click on "Customer Queue" sub menu

Step2: Customer Queue Page appears as follows:



Step3: Thereafter select desired campaigns to trace the inbound or outbound calls

Quality

This module used for search recording, download recording and export searched data in excel sheet.

Sub module are as follows:

(i) Search Recording

(ii) Transfer Logs

(iii) Conference Logs

(iv) Download Logs

(v) TL Recording

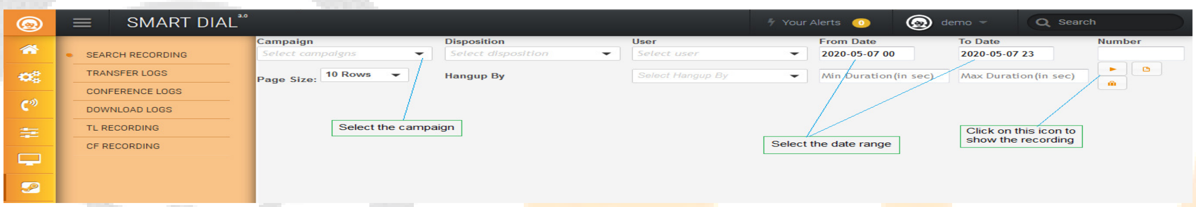
(vi) CF Recording

2.1.a.50 Search Recording

This mechanism enables to `View/Download/Export` the recording data through "Search Recording" sub menu.

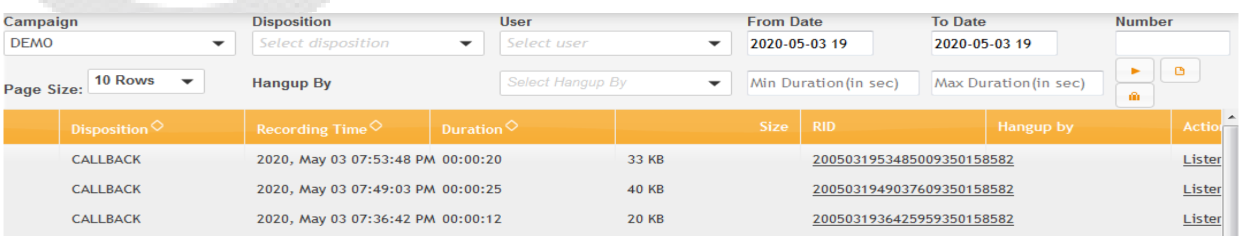
Step1: Go to "Quality" menu => Then click on "Search Recording" sub menu

Step2: "Search Recording" page appears as follows:



Step3: Select the campaign, date range and other search criteria option

Step4: After that click on view icon to show the recording data

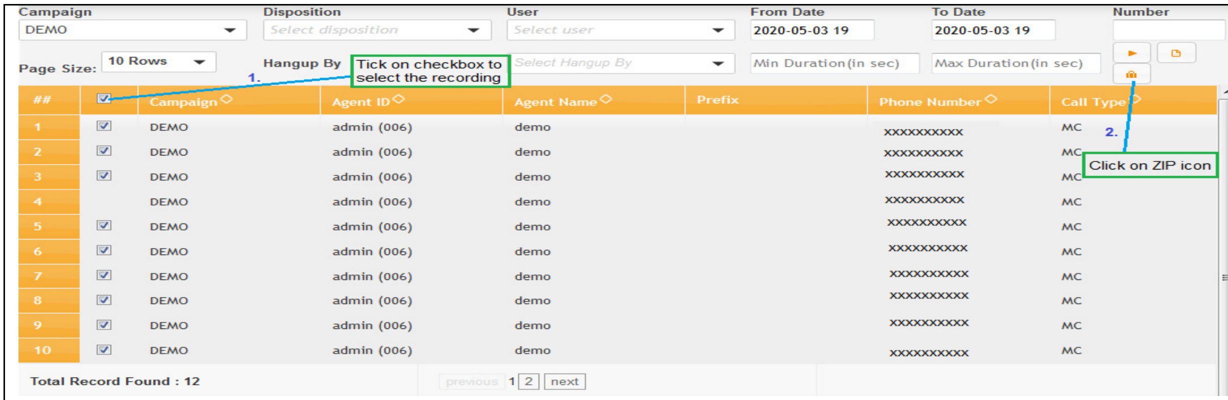


<u>Download Single Recording</u>

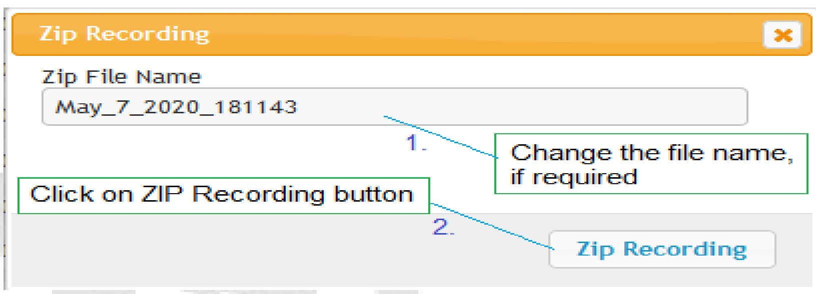
Step5: As we click on "RID" label then it provide the option for Open/Save the recording

<u>Download ZIP Recording</u>

Step5: Tick on checkbox to select the recording file, then click on ZIP icon

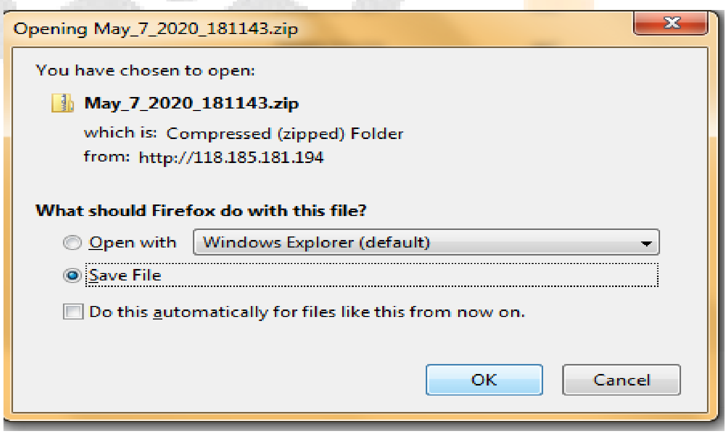


Step6: After clicking on ZIP icon, a dialog box appears as follows:



Step7: Enter the ZIP file name, then click on “ZIP Recording” button

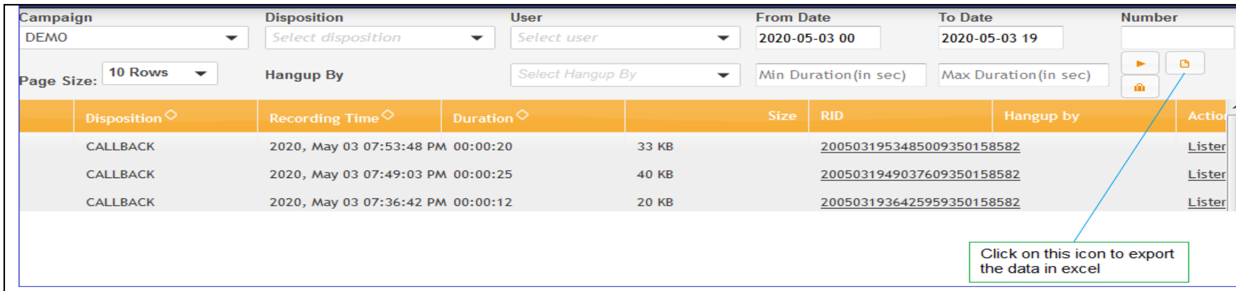
Step8: After clicking on “ZIP Recording” button then its gives the option as follows:



Step9: Select the Save file option and click on Ok button to save the ZIP file in system.

Export Search Recording data

Step1: When recording data view on search recording page, then click on Export icon



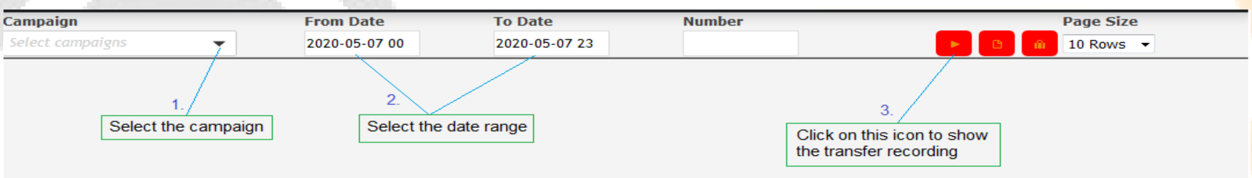
Step2: After clicking on export icon, it gives the option to open/save the file in excel sheet

2.1.a.51 Transfer Logs

This mechanism enables to `View/Download/Export` the transfer recording data through "Transfer Logs" sub menu.

Step1: Go to "Quality" menu => Then click on "Transfer Logs" sub menu

Step2: "Transfer Logs" page appears as follows:



Step3: Select the campaign and date range

Step4: After that click on view icon to show the transfer log data

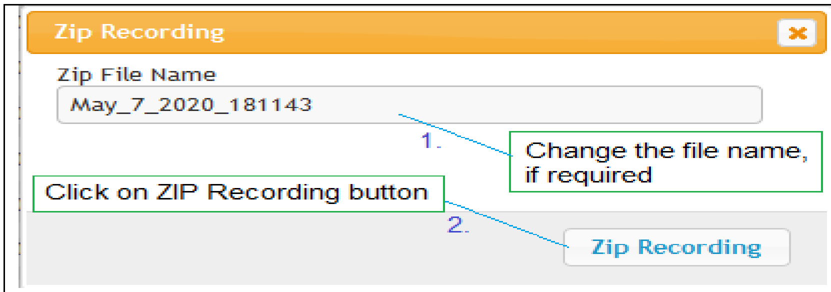
Download Single Recording

Step5: As we click on "RID" label then it provide the option for Open/Save the recording

Download ZIP Recording

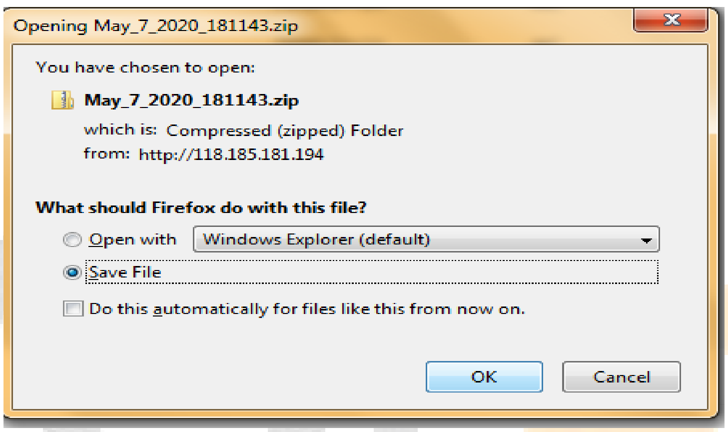
Step5: Tick on checkbox to select the recording file, then click on ZIP icon

Step6: After clicking on ZIP icon, a dialog box appears as follows:



Step7: Enter the ZIP file name, then click on "ZIP Recording" button

Step8: After clicking on "ZIP Recording" button then its gives the option as follows:



Step9: Select the Save file option and click on Ok button to save the ZIP file in system.

Export Transfer Logs data

Step1: When recording data view on transfer logs page, then click on Export icon

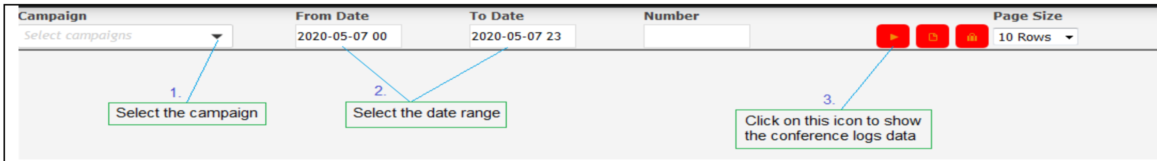
Step2: After clicking on export icon, it gives the option to open/save the file in excel sheet

2.1.a.52 Conference Logs

This mechanism enables to `View/Download/Export` the conference recording data through "Conference Logs" sub menu.

Step1: Go to "Quality" menu => Then click on "Conference Logs" sub menu

Step2: "Conference Logs" page appears as follows:



Step3: Select the campaign and date range

Step4: After that click on view icon to show the Conference log data

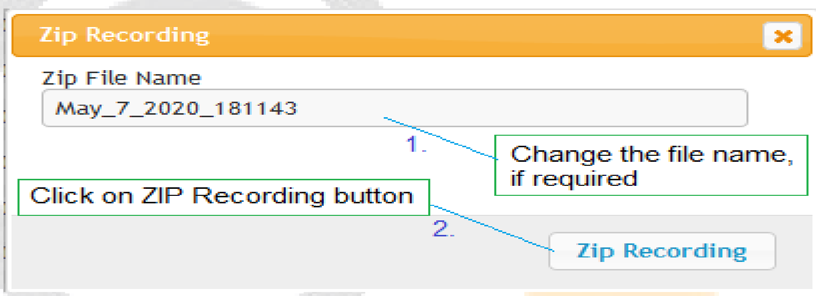
Download Single Recording

Step5: As we click on "RID" label then it provide the option for Open/Save the recording

Download ZIP Recording

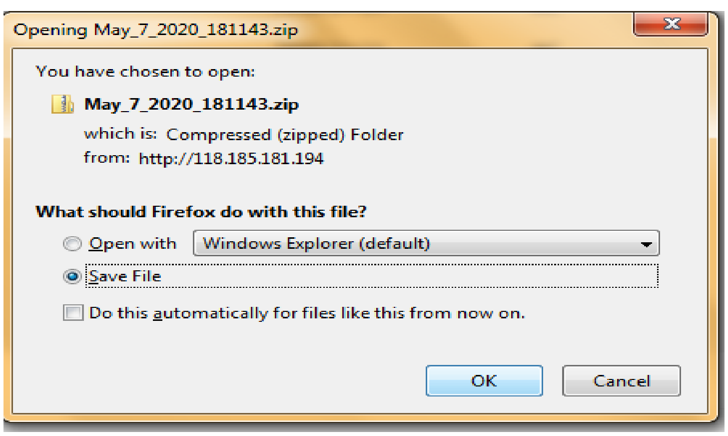
Step5: Tick on checkbox to select the recording file, then click on ZIP icon

Step6: After clicking on ZIP icon, a dialog box appears as follows:



Step7: Enter the ZIP file name, then click on "ZIP Recording" button

Step8: After clicking on "ZIP Recording" button then its gives the option as follows:



Step9: Select the Save file option and click on Ok button to save the ZIP file in system.

Export Conference Logs data

Step1: When recording data view on Conference logs page, then click on Export icon

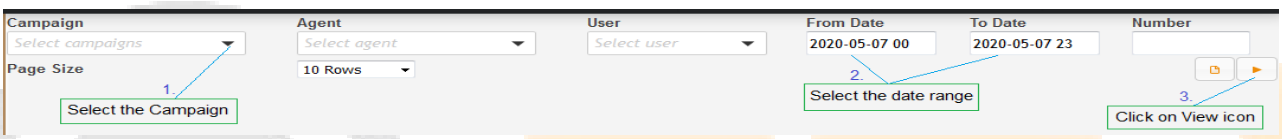
Step2: After clicking on export icon, it gives the option to open/save the file in excel sheet

2.1.a.53 Download Logs

This mechanism enables to `View/Export` the logs of download recording through "Download Logs" sub menu.

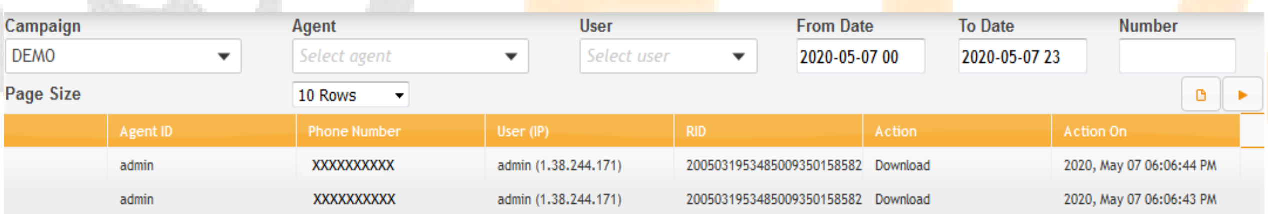
Step1: Go to "Quality" menu => Then click on "Download Logs" sub menu

Step2: "Download Logs" page appears as follows:



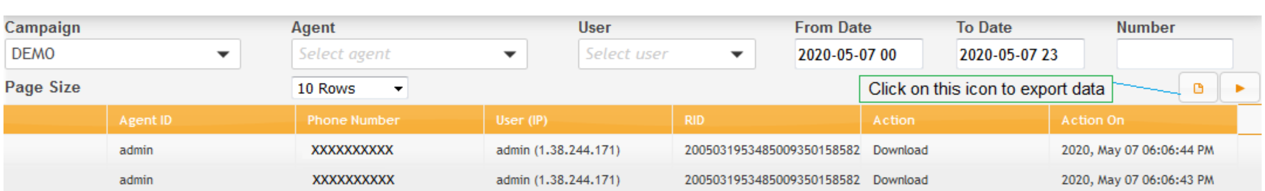
Step3: Select the campaign, date range and other search criteria option

Step4: After that click on view icon to show the Download log data



Export Download Logs data

Step1: When recording data view on Download Logs page, then click on Export icon



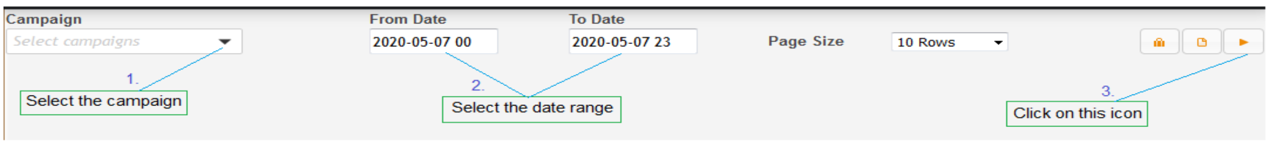
Step2: After clicking on export icon, it gives the option to open/save the file in excel sheet

2.1.a.54 TL Recording

This mechanism enables to `View/Download/Export` the TL conversation recording data through "TL Recording" sub menu.

Step1: Go to "Quality" menu => Then click on "TL Recording" sub menu

Step2: "TL Recording" page appears as follows:



Step3: Select the campaign and date range

Step4: After that click on view icon to show the TL Recording data

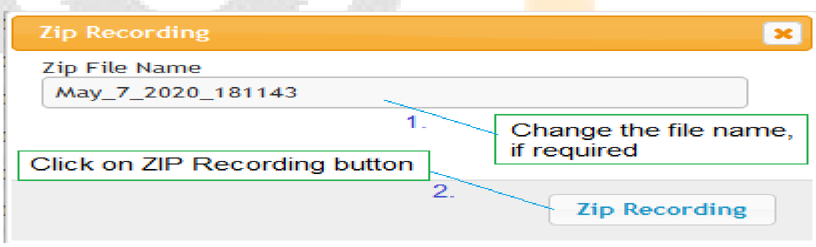
Download Single Recording

Step5: As we click on "RID" label then it provide the option for Open/Save the recording

Download ZIP Recording

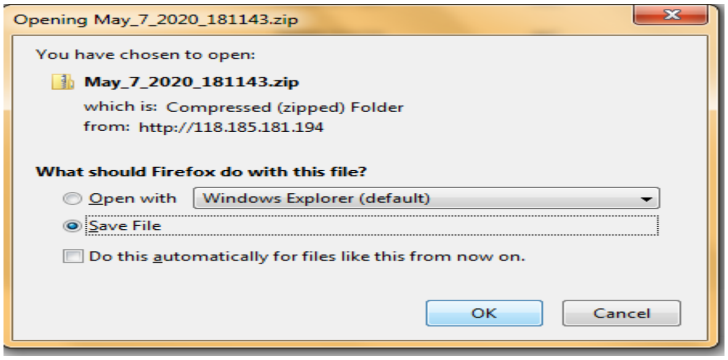
Step5: Tick on checkbox to select the recording file, then click on ZIP icon

Step6: After clicking on ZIP icon, a dialog box appears as follows:



Step7: Enter the ZIP file name, then click on "ZIP Recording" button

Step8: After clicking on "ZIP Recording" button then its gives the option as follows:



Step9: Select the Save file option and click on Ok button to save the ZIP file in system.

Export TL Recording data

Step1: When recording data view on TL Recording page, then click on Export icon

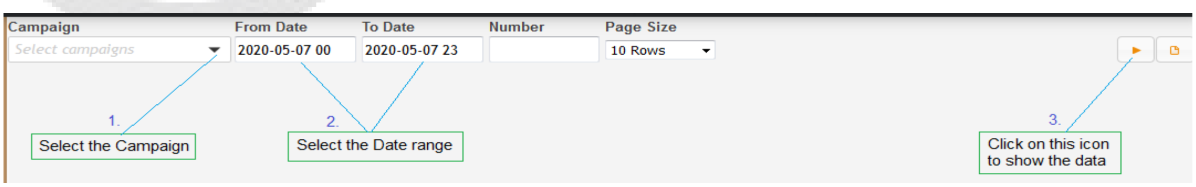
Step2: After clicking on export icon, it gives the option to open/save the file in excel sheet

2.1.a.55 CF Recording

This mechanism enables to `View/Download/Export` the call forward recording data through "CF Recording" sub menu.

Step1: Go to "Quality" menu => Then click on "CF Recording" sub menu

Step2: "CF Recording" page appears as follows:



Step3: Select the campaign, date range

Step4: After that click on view icon to show the CF Recording data on panel

Download Single Recording

Step1: When recording data view on CF Recording page,

Step2: Then click on "Download" label, it provide the option for Open/Save the recording

Export CF Recording data in excel

Step1: When recording data view on CF Recording page, then click on Export icon

Step2: After clicking on export icon, it gives the option to open/save the file in excel sheet

Analytics

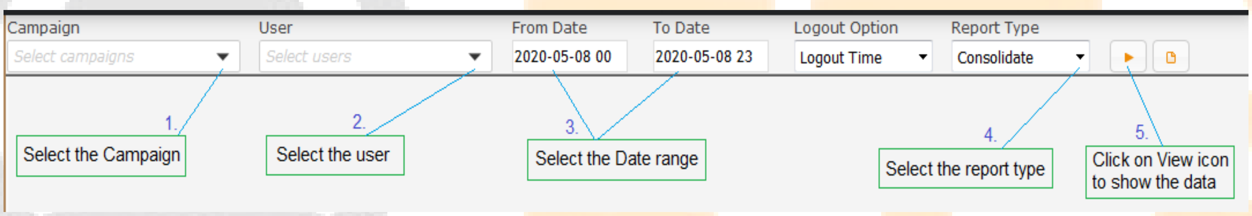
This module used to view and download the report through admin panel.

2.1.a.56 User Session Report

This mechanism enables to `View/Export` the user’s log data through “User Session” sub menu.

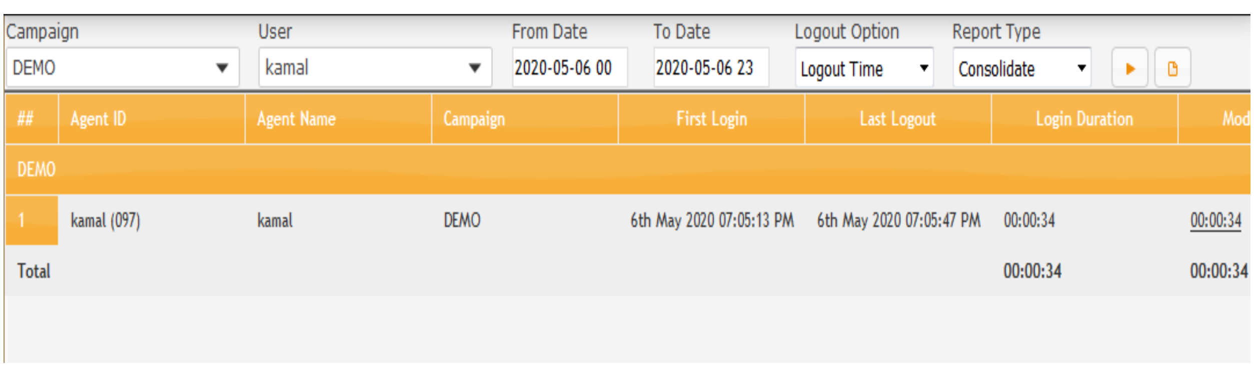
Step1: Go to "Analytics" menu => Then click on "User Session" sub menu

Step2: “User Session” page appears as follows:



Step3: Then select the campaign, user, report type and date range

Step4: After that click on view icon to show the user’s log data on panel as follows:



Step5: When data shows on user session page, click on export icon

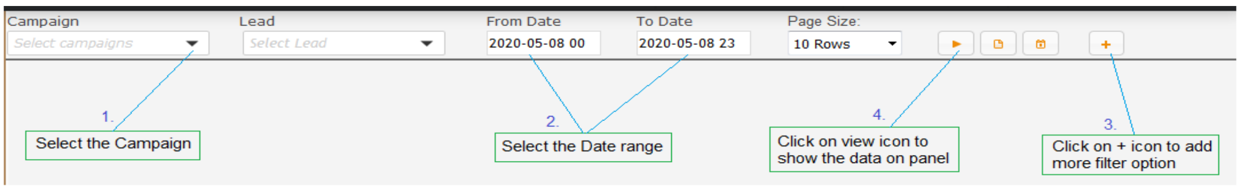
Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet

2.1.a.57 CDR Report

This mechanism enables to `View/Export` the cdr log data through "CDR Report" sub menu.

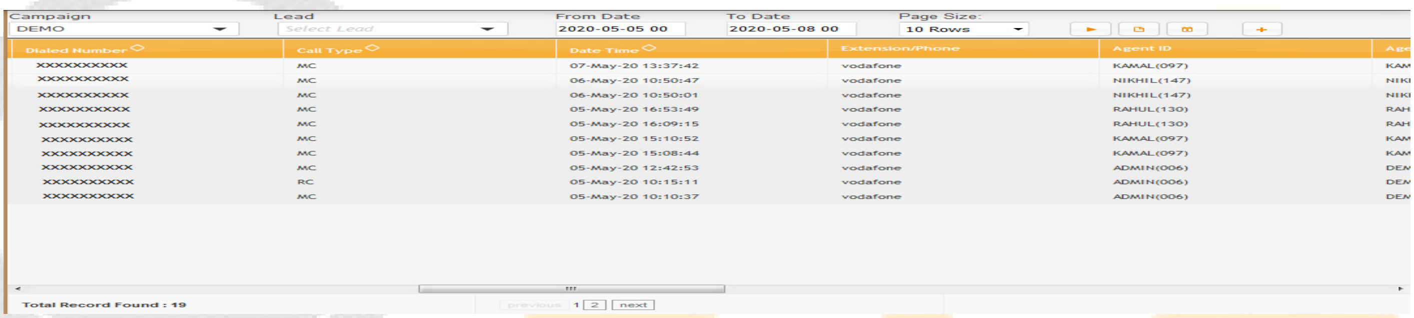
Step1: Go to "Analytics" menu => Then click on "CDR Report" sub menu

Step2: "CDR Report" page appears as follows:



Step3: Then select the campaign, date range and add more filter option through + icon

Step4: After that click on view icon to show the cdr log data on panel as follows:



Dialed Number	Call Type	Date Time	Extension/Phone	Agent ID
XXXXXXXXXX	MC	07-May-20 13:37:42	vodafone	KAMAL(097)
XXXXXXXXXX	MC	06-May-20 10:50:47	vodafone	NIKHIL(147)
XXXXXXXXXX	MC	06-May-20 10:50:01	vodafone	NIKHIL(147)
XXXXXXXXXX	MC	05-May-20 16:53:49	vodafone	RAHUL(130)
XXXXXXXXXX	MC	05-May-20 16:09:15	vodafone	RAHUL(130)
XXXXXXXXXX	MC	05-May-20 15:10:52	vodafone	KAMAL(097)
XXXXXXXXXX	MC	05-May-20 15:08:44	vodafone	KAMAL(097)
XXXXXXXXXX	MC	05-May-20 12:42:53	vodafone	ADMIN(006)
XXXXXXXXXX	RC	05-May-20 10:15:11	vodafone	ADMIN(006)
XXXXXXXXXX	MC	05-May-20 10:10:37	vodafone	ADMIN(006)

Step5: When data shows on CDR Report page, click on export icon

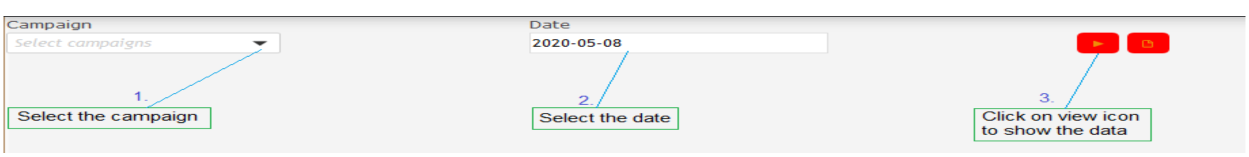
Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet

2.1.a.58 Queue Details

This mechanism enables to `View/Export` the queue log data through "Queue Details" sub menu.

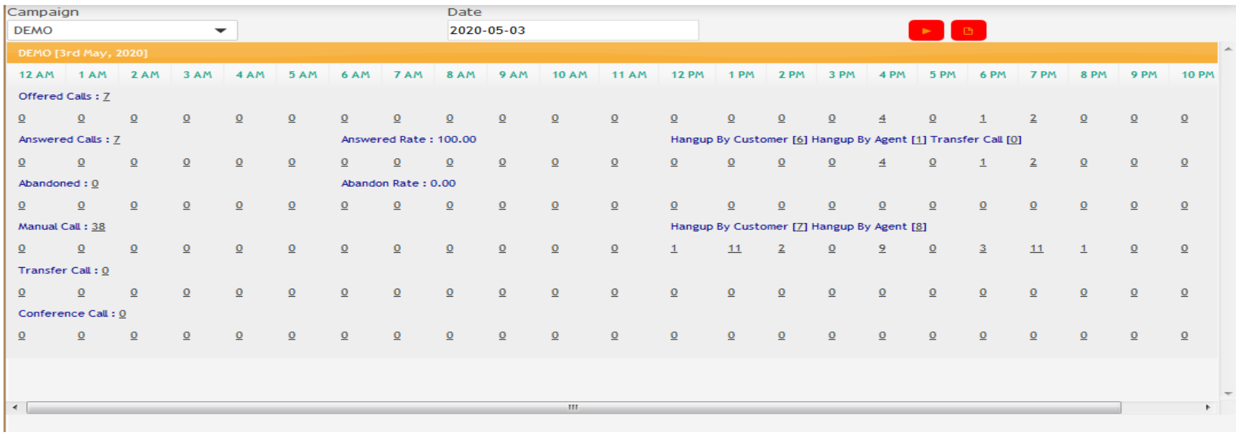
Step1: Go to "Analytics" menu => Then click on "Queue Details" sub menu

Step2: "Queue Details" page appears as follows:



Step3: Then select the campaign and date

Step4: After that click on view icon to show the queue log data on panel as follows:



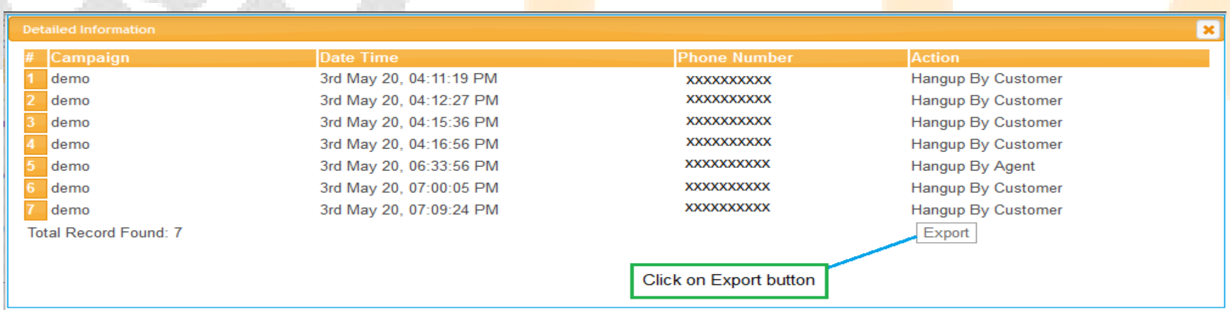
Step5: When data shows on Queue Details page, click on export icon

Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet

Detailed Information

Step1: When queue data shows on Queue Details page

Step2: Then click on count label of offered/Answered/Abandoned/Manual/Transfer/Conference calls to get the detail information as follows:



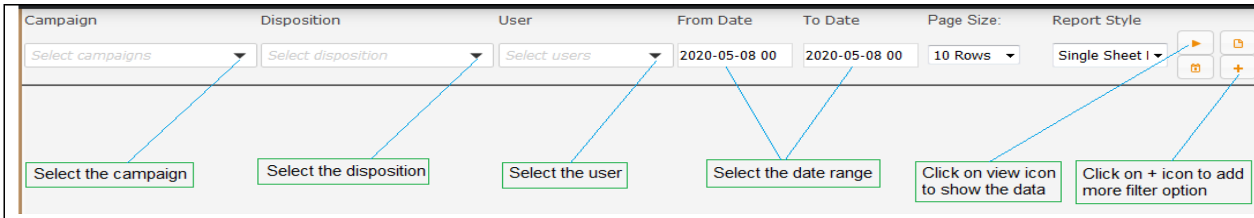
Step3: After clicking on export button, it gives the option to open/save the data in excel sheet

2.1.a.59 Disposition Report

This mechanism enables to `View/Export` the disposition log data through "Disposition Report" sub menu.

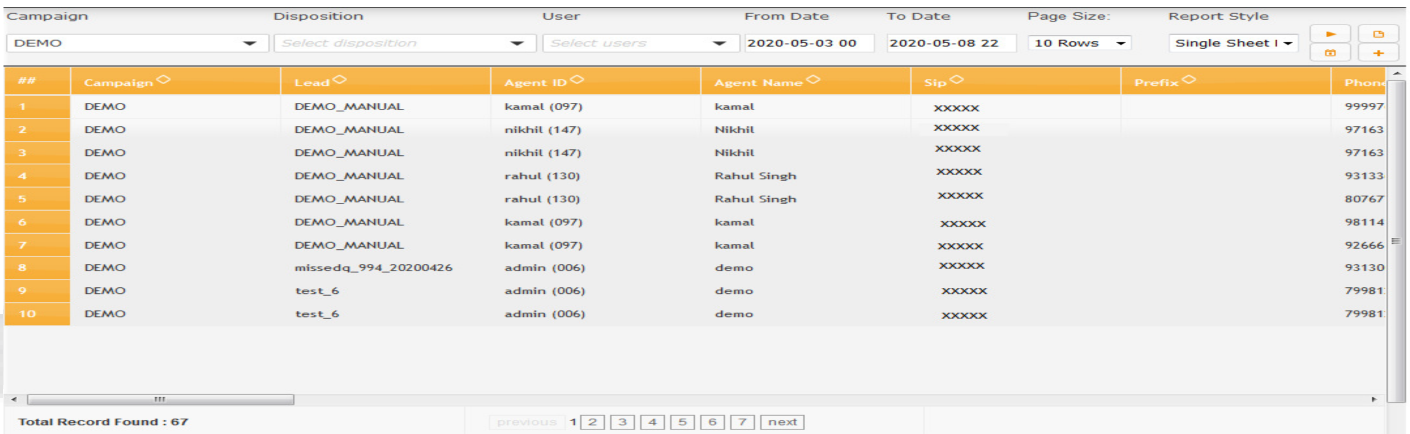
Step1: Go to "Analytics" menu => Then click on "Disposition Report" sub menu

Step2: "Disposition Report" page appears as follows:



Step3: Then select the campaign, disposition, user, date range, report style and add more filter option through icon

Step4: After that click on view icon to show the disposition log data on panel as follows:



##	Campaign	Lead	Agent ID	Agent Name	Sip	Prefix	Phon
1	DEMO	DEMO_MANUAL	kamal (097)	kamal	xxxxx		99997
2	DEMO	DEMO_MANUAL	nikhil (147)	Nikhil	xxxxx		97163
3	DEMO	DEMO_MANUAL	nikhil (147)	Nikhil	xxxxx		97163
4	DEMO	DEMO_MANUAL	rahul (130)	Rahul Singh	xxxxx		93133
5	DEMO	DEMO_MANUAL	rahul (130)	Rahul Singh	xxxxx		80767
6	DEMO	DEMO_MANUAL	kamal (097)	kamal	xxxxx		98114
7	DEMO	DEMO_MANUAL	kamal (097)	kamal	xxxxx		92666
8	DEMO	missedq_994_20200426	admin (006)	demo	xxxxx		93130
9	DEMO	test_6	admin (006)	demo	xxxxx		79981
10	DEMO	test_6	admin (006)	demo	xxxxx		79981

Total Record Found : 67

previous 1 2 3 4 5 6 7 next

Step5: When data shows on Disposition Report page, click on export icon

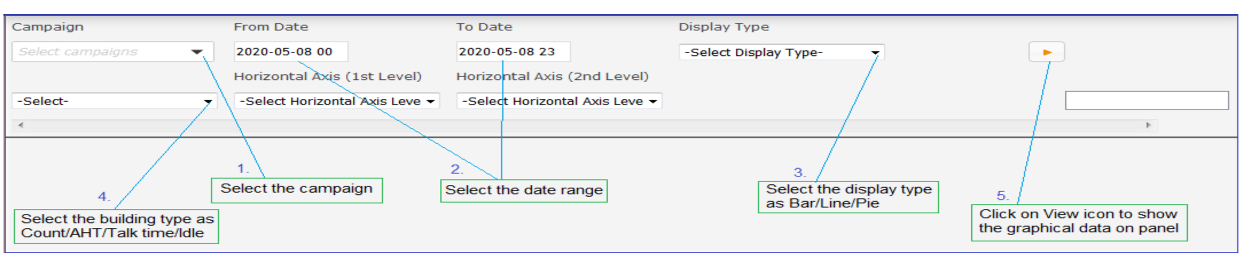
Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet

2.1.a.60 User Session Graph

This mechanism enables to `View` the summary of users in form of graphical interface.

Step1: Go to "Analytics" menu => Then click on "User Session Graph" sub menu

Step2: “User Session Graph” page appears as follows:



Step3: Then select the campaign, date range, display type, building type and add other search criteria options

Step4: After that click on view icon to show the data in graphical interface

Here it consists of three types of displays

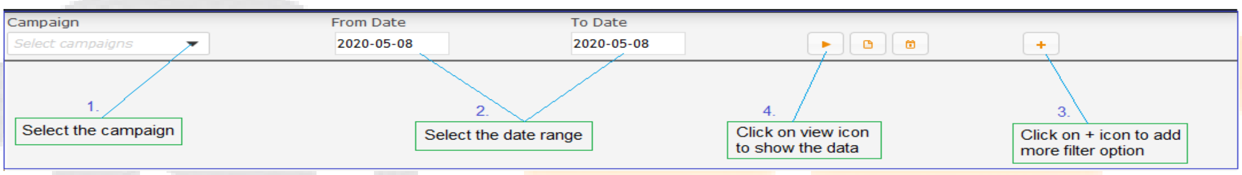
A. Line Graph
B. Bar Graph
C. Pie Graph

2.1.a.61 Disposition Summary

This mechanism enables to `View/Export` the summary of disposition through "Disposition Summary" sub menu.

Step1: Go to "Analytics" menu => Then click on "Disposition Summary" sub menu

Step2: "Disposition Summary" page appears as follows:



Step3: Then select the campaign, date range and add + icon to add more filter option

Step4: After that click on view icon to show the data on panel

Step5: When data shows on Disposition Summary page, click on export icon

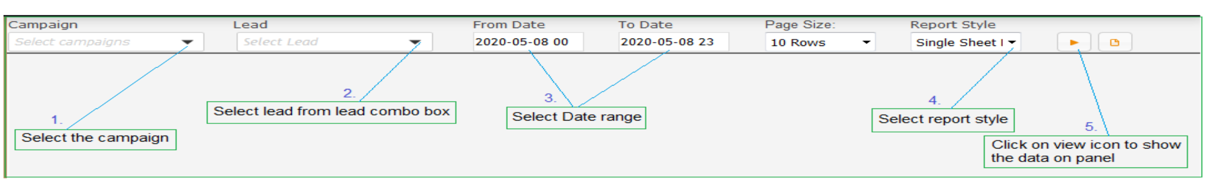
Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet

2.1.a.62 CRM Report

This mechanism enables to `View/Export` the unique CRM data of customer through "CRM Report" sub menu.

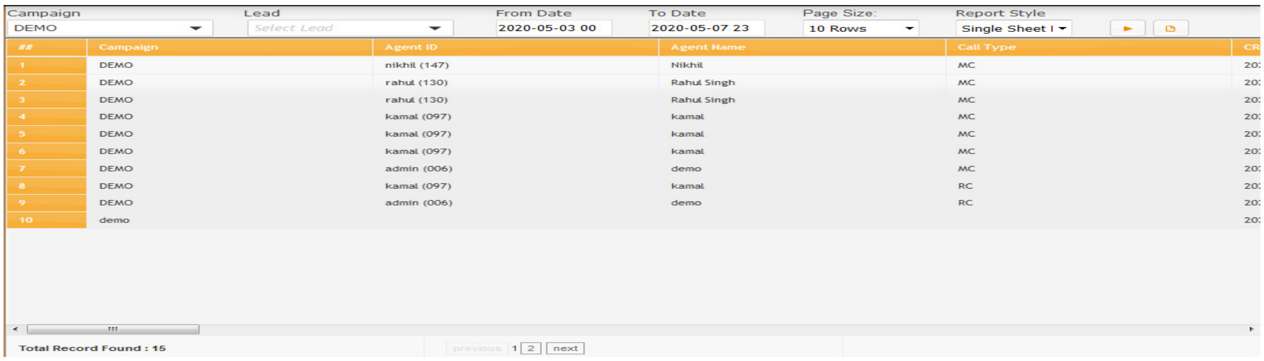
Step1: Go to "Analytics" menu => Then click on "CRM Report" sub menu

Step2: "CRM Report" page appears as follows:



Step3: Then select the campaign, lead, date range and report style

Step4: After that click on view icon to show the data on panel



##	Campaign	Agent ID	Agent Name	Call Type	CR
1	DEMO	nikhil (147)	Nikhil	MC	20:
2	DEMO	rahul (130)	Rahul Singh	MC	20:
3	DEMO	rahul (130)	Rahul Singh	MC	20:
4	DEMO	kamal (097)	kamal	MC	20:
5	DEMO	kamal (097)	kamal	MC	20:
6	DEMO	kamal (097)	kamal	MC	20:
7	DEMO	admin (006)	demo	MC	20:
8	DEMO	kamal (097)	kamal	RC	20:
9	DEMO	admin (006)	demo	RC	20:
10	demo				20:

Step5: When data shows on CRM Report page, click on export icon

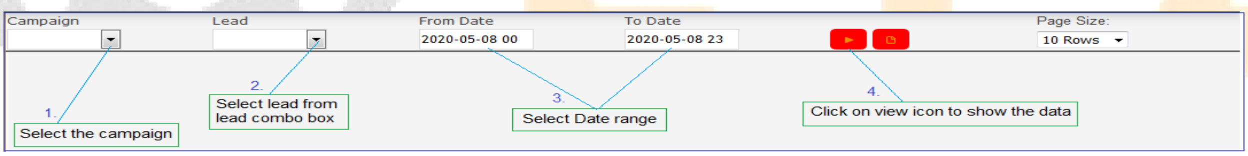
Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet

2.1.a.63 CRM Log Report

This mechanism enables to `View/Export` the CRM data log of customer through "CRM Log Report" sub menu.

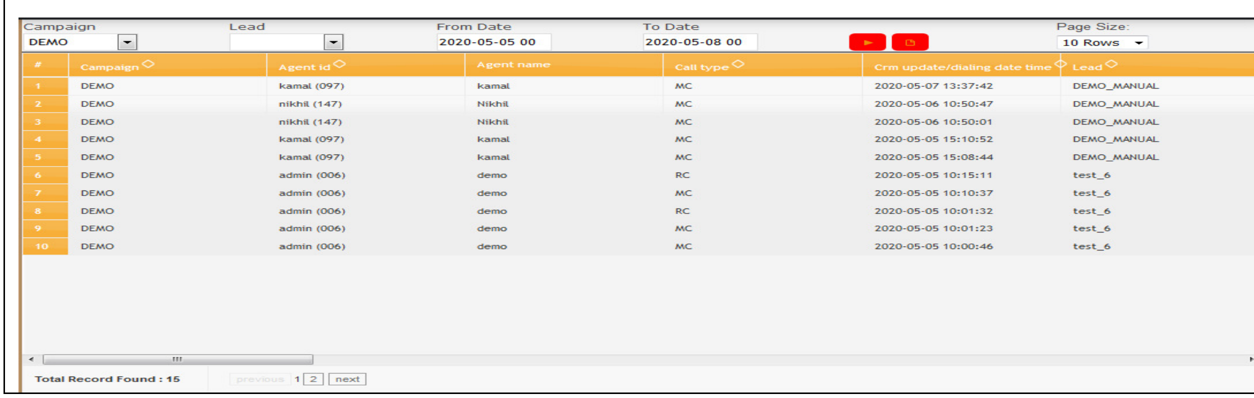
Step1: Go to "Analytics" menu => Then click on "CRM Log Report" sub menu

Step2: "CRM Log Report" page appears as follows:



Step3: Then select the campaign, lead and date range

Step4: After that click on view icon to show the data on panel



#	Campaign	Agent id	Agent name	Call type	Crm update/dialing date time	Lead
1	DEMO	kamal (097)	kamal	MC	2020-05-07 13:37:42	DEMO_MANUAL
2	DEMO	nikhil (147)	Nikhil	MC	2020-05-06 10:50:47	DEMO_MANUAL
3	DEMO	nikhil (147)	Nikhil	MC	2020-05-06 10:50:01	DEMO_MANUAL
4	DEMO	kamal (097)	kamal	MC	2020-05-05 15:10:52	DEMO_MANUAL
5	DEMO	kamal (097)	kamal	MC	2020-05-05 15:08:44	DEMO_MANUAL
6	DEMO	admin (006)	demo	RC	2020-05-05 10:15:11	test_6
7	DEMO	admin (006)	demo	MC	2020-05-05 10:10:37	test_6
8	DEMO	admin (006)	demo	RC	2020-05-05 10:01:32	test_6
9	DEMO	admin (006)	demo	MC	2020-05-05 10:01:23	test_6
10	DEMO	admin (006)	demo	MC	2020-05-05 10:00:46	test_6

Step5: When data shows on CRM Log Report page, click on export icon

Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet

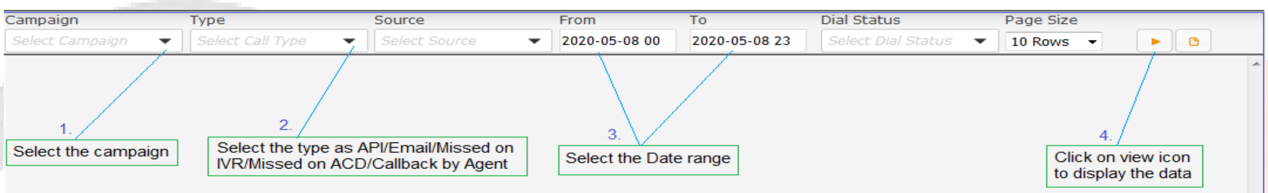
2.1.a.64 Callback Log

This mechanism enables to `View/Export` the Callback data through “Callback Log” sub menu.

This part facilitates the calls disposed and initiated as callbacks.

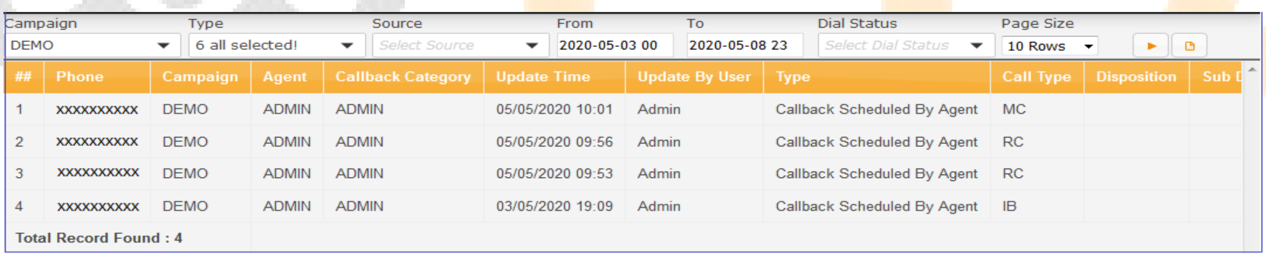
Step1: Go to "Analytics" menu => Then click on "Callback Log" sub menu

Step2: “Callback Log” page appears as follows:



Step3: Then select the campaign, type and date range as shown in picture

Step4: After that click on view icon to show the data on panel



##	Phone	Campaign	Agent	Callback Category	Update Time	Update By User	Type	Call Type	Disposition	Sub D
1	xxxxxxxxxx	DEMO	ADMIN	ADMIN	05/05/2020 10:01	Admin	Callback Scheduled By Agent	MC		
2	xxxxxxxxxx	DEMO	ADMIN	ADMIN	05/05/2020 09:56	Admin	Callback Scheduled By Agent	RC		
3	xxxxxxxxxx	DEMO	ADMIN	ADMIN	05/05/2020 09:53	Admin	Callback Scheduled By Agent	RC		
4	xxxxxxxxxx	DEMO	ADMIN	ADMIN	03/05/2020 19:09	Admin	Callback Scheduled By Agent	IB		

Total Record Found : 4

Step5: When data shows on Callback Log page, click on export icon

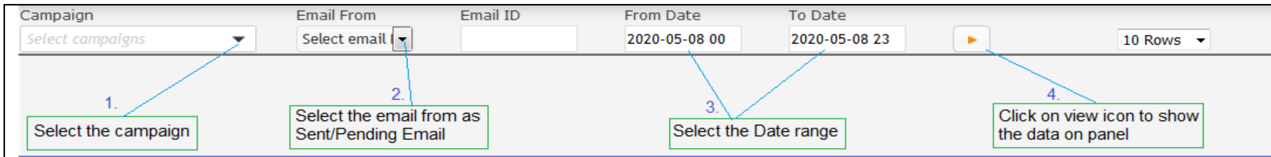
Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet

2.1.a.65 Email Log

This mechanism enables to `View/Export` the log for email which sent through the agent.

Step1: Go to "Analytics" menu => Then click on "Email Log" sub menu

Step2: “Email Log” page appears as follows:



Step3: Then select the campaign, email from and date range as shown in picture

Step4: After that click on view icon to show the data on panel

Step5: When data shows on Email Log page, click on export button through email log page

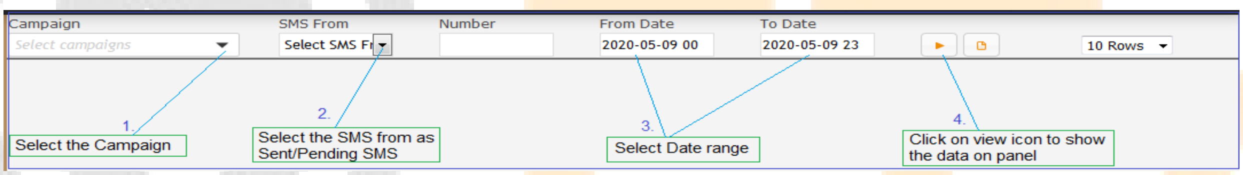
Step6: After clicking on export button, it gives the option to open/save the data in excel sheet

2.1.a.66 SMS Log

This mechanism enables to `View/Export` the log for SMS which sent through the agent.

Step1: Go to "Analytics" menu => Then click on "SMS Log" sub menu

Step2: "SMS Log" page appears as follows:



Step3: Then select the campaign, SMS from and date range as shown in picture

Step4: After that click on view icon to show the data on panel

Step5: When data shows on SMS Log page, click on export icon

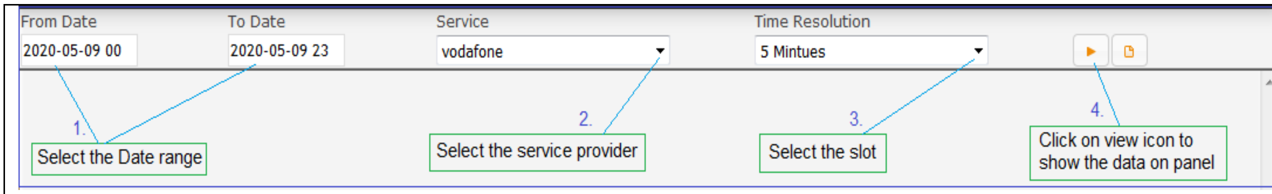
Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet

2.1.a.67 Channel Utilization

This mechanism enables to `View/Export` the usage of channel utilization against service provider.

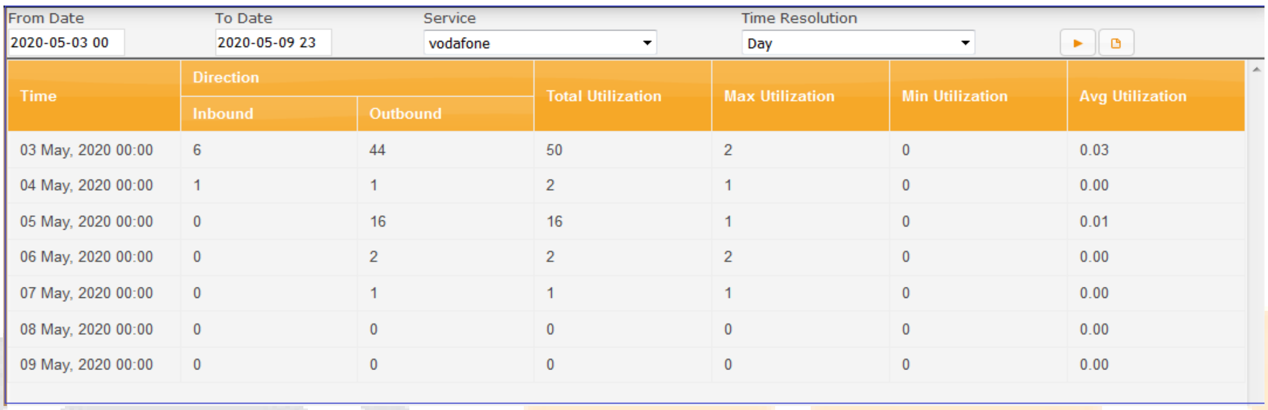
Step1: Go to "Analytics" menu => Then click on "Channel Utilization" sub menu

Step2: "Channel Utilization" page appears as follows:



Step3: Then select the date range, service provider and slot as shown in picture

Step4: After that click on view icon to show the data on panel



Time	Direction		Total Utilization	Max Utilization	Min Utilization	Avg Utilization
	Inbound	Outbound				
03 May, 2020 00:00	6	44	50	2	0	0.03
04 May, 2020 00:00	1	1	2	1	0	0.00
05 May, 2020 00:00	0	16	16	1	0	0.01
06 May, 2020 00:00	0	2	2	2	0	0.00
07 May, 2020 00:00	0	1	1	1	0	0.00
08 May, 2020 00:00	0	0	0	0	0	0.00
09 May, 2020 00:00	0	0	0	0	0	0.00

Step5: When data shows on "Channel Utilization" page, click on export icon

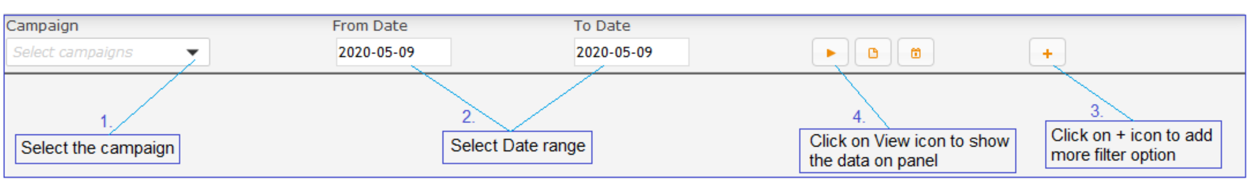
Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet

2.1.a.68 CDR Summary

This mechanism enables to `View/Export` the summary of CDR. through "CDR Summary" sub menu.

Step1: Go to "Analytics" menu => Then click on "CDR Summary" sub menu

Step2: "CDR Summary" page appears as follows:



Step3: Then select the campaign, date range and click on + icon to add more filter option as shown in picture

Step4: After that click on view icon to show the data on panel

Campaign: DEMO | From Date: 2020-05-03 | To Date: 2020-05-03

Call Type: 4 all selected!

Hourly: 8 all selected!

#	Campaign	Call Type	Hour	Count	Billsec
1	demo	OB	18	4	00:01:20
2	demo	MC	18	3	00:00:00
3	demo	MC	16	9	00:01:20
4	DEMO	IB	16	4	00:03:21
5	demo	MC	20	1	00:00:00
6	demo	MC	19	11	00:00:58
7	demo	MC	12	1	00:00:00
8	DEMO	IB	18	1	00:00:37
9	demo	MC	13	11	00:01:40
10	demo	RC	17	2	00:00:29
11	DEMO	IB	19	1	00:00:37
12	demo	MC	14	2	00:00:15
			Total	50	00:10:37

Step5: When data shows on "Channel Utilization" page, click on export icon

Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet