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# 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 <u>http://xxx.xxx/smart/</u> on search bar, which results the login page will appear below

	SMART LO	DGIN	
	Enter Your Code	-tột	
	Enter UserID		
200	Enter Password		
	Remember me		
	Log me in 🗲		
L L L			1



<ol> <li>Enter your client Code</li> <li>Enter your userid</li> </ol>		<b>A</b>				
2. Enter your userid		and the second				
Z. Linter your useriu	and the second se	1111		0		
		admin		4		
3. Enter Password		••••••		<b>a</b>		
		Remember me				
		Log me in 🔶				
			4. After ent press "Lo	ering valid credentials og me in" button		
Finally the admin u	user is logs	ged in to the hon	ne page or Das	hboard page.		
1						
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SUMMARY	Mode Details (1)	1 🔺 100 % Auto				
	Agent Status	1 🔺 100 %				
	(1)	READY		0		
			~			
4	Mode Details	Agent Status	Idle Status	Wrapup Status	Talk Status	
4	Mode Details	Agent Status	101e Status 00:00:00	00:00:00	00:00:00	
4	Mode Details	<ul> <li>Agent Status</li> </ul>	Idle Status     00:00:00	00:00:00	00:00:00	
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	Mode Details	▲J Agent Status	Idle Status	00:00:00	00:00:00	
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8



#### **# 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 :



**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.

9					E Maria Marta		O Casarah	
	SMART DIAL	Mode Details	1		7 Your Alerts U	demo 🗸	Q search	
	CLIENT DIRECTORY	(1)	Auto					
-08	DND	Agent Status	1 🔺 100 % 2. Lef	t click on the Client Direc	tory sub menu			
¢۵	USER MODE MASTER	(1)	READY					
-	MENU MAPPING	Mode Details	<ul> <li>Agent Status</li> </ul>	dle Status	Wrapup Status	Talk Status		
	USER STATUS COLOUR	1	1	00:00:00	00:00:00	00:00:00		
	SMS CONFIG							
	EMAIL CONFIG		Clicking on System Conf	iguration				
[]	BLACKLIST	1.	will flow the following o	ption				
	EXTENSION DETAIL							
	DISPOSITION							
	ZONE DIALING MAP							
	CHAT GROUPS							
	LEAD SOURCE							
Step	o2: After clicking o	on client direct	tory button, the	client directory	y page will appe	ear as below :-		
		_			K Your Alarta	🔕 dama 📼	3 Search	
9	SIVIART DIAL				7 Four Alerts	demo +		
*	CLIENT DIRECTORY	Phone	Name	Designation	Tier	Campalen	¢ ± + ₹	
o\$	ACL RULES	8010063746	Anubhay Singh	Mansager	I	DEMO		
<b>(</b> )	DND							
1°	USER MODE MASTER							
1.22								
	MENU MAPPING							
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••••••••••••••••••••••••••••••••••••••	MENU MAPPING USER STATUS COLOUR USER MODE PERMISSION SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER							
2 2 1 1	MENU MAPPING USER STATUS COLOUR USER MODE PERMISSION SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION							
9 9 11	MENU MAPPING USER STATUS COLOUR USER MODE PERMISSION SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION ZONE DIALING MAP							
9 141	MENU MAPPING USER STATUS COLOUR USER MODE PERMISSION SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION ZONE DIALING MAP CHAT GROUPS							









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

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*	CLIENT DIRECTORY						4 2 + 7	
¢¢	ACL RULES	8010063746	Anubhav Singh		×			
<b>C</b> ®	USER MODE MASTER		F	thone No.*				and the second second
÷	MENU MAPPING		Client Directory C	Create Successfully!				
	USER STATUS COLOUR		888					
<u> </u>	USER MODE PERMISSION			UK				
<b>S</b> 2	SMS CONFIG		9	Campaign DEMO				
	EMAIL CONFIG							
<u>lait</u>	BLACKLIST							
	EXTENSION DETAIL							
	USER							
	DISPOSITION							
	ZONE DIALING MAP				Save Cancel			
	CHAT GROUPS							
	LEAD SOURCE							
	SKILL MASTER							I
Step? as be	7: Now press the '' low :-	Ok" button of p	oopup dialog box	x, once clicked i	t appears to	be the num	ber have been sav	ed in the director





# 2. Editing the data in client directory:-

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

1	A 100					
$\equiv$ SMART DIAL <sup>**</sup>				Your Alerts 🕕	lemo 👻	Q Search
						¢ 💼 🕂
	Phone	Name	Designation	Tier	Campaign	Action
AGE ROLES	8010063746	Anubhav Singh	Mansager	1	DEMO	<u></u>
USER MODE MASTER		Edit Client Directory Phone No.*		×		Edit
MENU MAPPING		8010063746 Name *				
USER STATUS COLOUR		Anubhav Singh			1. Click on this i	icon to enable editing
USER MODE PERMISSION	Editing option available	Mansager				
SMS CONFIG	tier and campaign	Tier*				
EMAIL CONFIG		Campaign DEMO		•		
BLACKLIST						
EXTENSION DETAIL						
USER						
DISPOSITION				3. Cli	ick on Update but	tton
ZONE DIALING MAP						
CHAT GROUPS						
LEAD SOURCE				update /		
SKILL MASTER						
After clicking of	on that icon, it will	open up a dialog	box that enal	oles editing	g of data.	
Now in the abo	ve dialog box edit	ing option availab	ole on name,	designation	, tier and c	ampaign.
Once done with	n renaming, click o	n the update butt	on to save the	e renamed d	lata.	
5: Once update bu	itton is clicked, sin	nilar pop-up dialc	og box will oc	cur below.		







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*	CLIENT DIRECTORY						¢ 🔹 + Ŧ
		8010063746	Anubhav Singh	Manager	1	DEMO	
	ACL RULES	9876543210	Aakash	IT		SITICABLE	
	USER MODE MASTER						
	MENU MAPPING		Delete selected Client Dire	ctory ?.			
	USER STATUS COLOUR						
	USER MODE PERMISSION		ок са	ncei			
	SMS CONFIG						
	EMAIL CONFIG						
	BLACKLIST						
	EXTENSION DETAIL						
	USER						
	DISPOSITION						
	ZONE DIALING MAP						
	CHAT GROUPS						
	LEAD SOURCE						
	SKILL MASTER						

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

Image: Control Direction       Image: Control Direction         Image: Control Direction							R Your Marta		- O Search
<ul> <li>culent DRECTORY</li> <li>ALL RULES</li> <li>DRO</li> <li>USER MODE PREMISSION</li> <li>USER STATUS COLOUR</li> <li>USER STATUS COLOUR</li> <li>USER STATUS COLOUR</li> <li>USER STATUS COLOUR</li> <li>USER MODE PREMISSION</li> <li></li></ul>	<u>@</u>	= SMART DIAL					7 Your Alerts	🧕 🛞 demo	Q Search
Note     Nove	*	CLIENT DIRECTORY							¢ • + +
Autorities in the intervention of the inter				Phone	Name	Designation	Tier	Campaign	Upload Client Director
tep3: Once upload button is clicked, a mini dialog box will appear as below	08			8010063746	Anubhav Sin	ingh Manager	1	DEMO	
User Mode PERMission User Mode PERMission User Mode PERMission User Status colour BARK CONFIG BALACKLIST EXAML COMPTG BALACKLIST EXAML COMPTG BALACKLIST EXAML COMPTG BELACKLIST EXAML SOURCE BRILL MASTER tep3: Once upload button is clicked, a mini dialog box will appear as below	ற			9876543210	Aakash	IT	0	SITICABLE	<ul> <li>Image: A set of the set of the</li></ul>
Meno Marving User Mode PerMission User Status column SMS config EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER CHAT GROUPS LEAD SOURCE SKILL MASTER tep3: Once upload button is clicked, a mini dialog box will appear as below		USER MODE MASTER							
tep3: Once upload button is clicked, a mini dialog box will appear as below	2	MENU MAPPING							
Image: Status colour         SMB Status         EMAIL CONFIG         BLACKLIST         Extension Detail         USER         DISPOSITION         ZONE DIALING MAP         CHAT GROUPS         LEAD SOURCE         Skill MASTER		USER MODE PERMISSION							facilitate bulk upload
SME CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION ZONE DIALING MAP CHAT GROUPS LEAD SOURCE SKILL MASTER Chat GROUPS LEAD SOURCE SKILL MASTER Chat GROUPS LEAD SOURCE SKILL MASTER		USER STATUS COLOUR							
EMAL CONFIG         BLACKLIGT         EXTENSION DETAIL         DISPOSITION         ZONE DIALING MAP         CHAT GROUPS         LEAD SOURCE         Skill MASTER	2	SMS CONFIG							
Step3: Once upload button is clicked, a mini dialog box will appear as below		EMAIL CONFIG							
EXTENSION DETAIL USER DISPOSITION HAT GROUPS LEAD SOURCE SKILL MASTER Step 3: Once upload button is clicked, a mini dialog box will appear as below		BLACKLIST							
USER DISPOSITION ZONE DIALING MAP LEAD SOURCE SKILL MASTER Step 3: Once upload button is clicked, a mini dialog box will appear as below		EXTENSION DETAIL							
Disposition         ZONE DIALING MAP         CHAT GROUPS         LEAD SOURCE         Skill MASTER    Step 3: Once upload button is clicked, a mini dialog box will appear as below		USER							
CHAT GROUPS LEAD SOURCE SKILL MASTER Step3: Once upload button is clicked, a mini dialog box will appear as below		DISPOSITION							
Extep3: Once upload button is clicked, a mini dialog box will appear as below		ZONE DIALING MAP							
Step3: Once upload button is clicked, a mini dialog box will appear as below		CHAT GROUPS							
skill MASTER		LEAD SOURCE							
tep3: Once upload button is clicked, a mini dialog box will appear as below		SKILL MASTER							
	tep.	3: Once upload bu	uttoi	n is click	ked, a mini dia	alog box will appea	r as below		



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*	CLIENT DIRECTORY						¢ ± +	•
OS.	ACL RULES	Phone Upload (CSV) file.	Name	Designation	Tier	Campaign	Action	Î
-	DND	Upload CSV File Format	Field Format(phone_nd	name designation t	er campaign)		<ul> <li>Image: A set of the set of the</li></ul>	
<b>C</b> <sup>20</sup>	USER MODE MASTER	Browse No file selected.	0%					
=	MENU MAPPING							
	USER MODE PERMISSION							
<u> </u>	USER STATUS COLOUR							
<i>.</i>	SMS CONFIG							
1	EMAIL CONFIG							
111	BLACKLIST							
	EXTENSION DETAIL							
	USER							
	DISPOSITION							
	ZONE DIALING MAP							
	CHAT GROUPS				Up	load Cancel		
	LEAD SOURCE							
	SKILL MASTER							+

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

_							_
		А	В	С	D	E	
	1	phone_no	name	designation	tier	campaign	
1	2	7654321900	Akhil	Quality	11	Demo	
;	3	9889675543	Rahul	Manager	н		
	1						

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

CLIENT DIRECTORY ACL RULES ACL RULES ACL RULES Upload CSV File Format Upload CSV File Format(phone_no[name]designation[tier(campaign) Upload CSV File Format Upload CSV File Format(phone_no]name]designation[tier(campaign) Upload CSV File Constrained Constrained Upload CSV File Constrained
ALLEN UIKES       Prove       Name       Designation       Ter       Campaign       Actor         IND       USER MODE MASTER       Updad CSV File Format (phone_no](name]designation]tier(campaign)       Image: Comparison of the format (phone_no](name]designation]tier(campaign)
RALL ROLES       Imposed (CSV) Res.       Imposed (CSV) Res.         DD       USER MODE MASTER         MENU MAPPING       USER MODE PRIMISSION         USER MODE PRIMISSION       2. "Client.csv" file selected         SMS COULDE       1. Click on Browse button to select the csv file         BLACKLIST       3. When csv file selected then click on Upload button
URU     Updaed CSV File Format     Field Format(phone_no[neare]designation[tier[campaign])       User MODE MASTER     Browse     0%       User MODE FRAMESION     Browse     0%       User MODE FRAMESION     1. Click on Browse button     2. "client.csv" file selected       User Mode Frame     1. Click on Browse button     1. Click on Upload button       User R     3. When csv file selected then       User R     DISPOSITION
USER MODE PRIMISSION     0%       USER MODE PRIMISSION     2, "client.csv" file selected       USER STATUS COLOUR     1. Click on Browse button       EMAIL CONFIG     1. Click on Browse button       BLACKUST     EXAMPLIANT       EXTENSION DETAIL     3. When csv file selected then click on Upload button
<ul> <li>MERU MAPPING</li> <li>USER MODE PERMISSION</li> <li>USER STATUS COLOR</li> <li>GMS SOURCE</li> <li>ENAL CONFIG</li> <li>BLACKLIST</li> <li>EXERNANCE</li> <li>DISPOSITION</li> </ul>
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USER STATUS CULCUR     1.       EMAL CONFIG       EMAL CONFIG       BLACKLIST       EXTENSION DETAIL       USER       DISPOSITION
SMB_CONFIG       BLACKLIST       EXTENSION DETAIL       USER       DISPOSITION
EMAL CONFIG BLACKLIGT EXTENSION DETAIL USER DISPOSITION 3. When csv file selected then click on Upload button
EXTENSION DEFINITION  EXTENSION DEPOSITION  BLACKLIST  3, When csv file selected then click on Upload button
EXTENSION DETAIL     3.     When csv file selected then click on Upload button
DISPOSITION
ZONE DIALING MAP
CHAT GROUPS Uproved Centeer
LEAD SOURCE
SKILL MASTER
p6: Once file selected then click on upload button. p7: After click on upload button, a popup window will ask a confirmation message.



۲	≡ SMART DIAL <sup>**</sup>					erts	🙆 demo 👻	
	CLIENT DIRECTORY							Ø
	ACL RULES						Campaign	
	DND	Upload CSV File Format	Field Format/obases or		ation tier campai	jn)		
	USER MODE MASTER	Browse client.csv	Are you sure want to Uploa	ad it ?				
	MENU MAPPING							
	USER MODE PERMISSION		OK Car	icel				
	SMS CONFIG							
	EMAIL CONFIG							
	BLACKLIST							
	EXTENSION DETAIL							
	USER							
	DISPOSITION							
							Ipload Cancel	
	LEAD SOURCE							

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".

0	$\equiv$ SMART DIAL <sup>**</sup>					🕴 Your Al	erts Օ	lemo 👻	Q Search
*	<ul> <li>CLIENT DIRECTORY</li> </ul>								φ <b>*</b> + <b>∓</b>
	ACL RULES	Phone	Name		Designation			Campaign	Action
- <b>M</b> e	DND	Upload (CSV) file.	at	Field Format(phon	e nolnameldesi	mationItierIcampa	aign)	×	
C.	USER MODE MASTER	Browco client or		100%			File unlog	d done	
- 年	MENU MAPPING	Mandatory Field	Invalid Phone	Not Found	Find Phone	Success Phone	Success	Failed	
	USER MODE PERMISSION	(Blank)	No.	Campaign	No.	No.	Total	Total	
-	USER STATUS COLOUR					9889675543	2	0	
<u>~</u>	SMS CONFIG								
-	EMAIL CONFIG								
<u>-111</u>	BLACKLIST								
	EXTENSION DETAIL								
	USER								
	DISPOSITION								
	ZONE DIALING MAP								
	CHAT GROUPS						Upto	Cancel	
	LEAD SOURCE								
	SKILL MASTER								-

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

	≡ SMART DIAL				🕈 Your Alerts _ 🕕	😡 demo 👻	Q Search
*	CLIENT DIRECTORY						(¢) (±) (+)
e i	ACL RULES	Phone	Name	Designation	Tier	Campaign	Action
*	DND	007054374	andonav singn	manager		DEMO	
»	USER MODE MASTER	765432190		Quality		Demo	
-	MENU MAPPING	988967554	3 Rahul	Manager			
	USER MODE PERMISSION			/			
	USER STATUS COLOUR		/				
3	SMS CONFIG						
	EMAIL CONFIG		Data uploaded through the "Up	load client Directory" optior	١		
	BLACKLIST						
	EXTENSION DETAIL						
	USER						
	DISPOSITION						
	ZONE DIALING MAP						
	CHAT GROUPS						
	LEAD SOURCE						
	SKILL MASTER						



### 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 :-

0	≡ SMART DIAL <sup>**</sup>	🕴 Your Alerts 🕕 🧔 🛞 demo 🛩 📿 Search
*	CLIENT DIRECTORY	Dnd Url         Add Dnd List         Upload Dnd List         Search Dnd List
08	ACL RULES	http://102.168.1.6/smatl/dod/chack_dod.php + Update_Local DND URL + Check URL
	• DND	nappintazi too normanone check_inicipitp
<b>(</b> *)	USER MODE MASTER	Remote DND URL + Update Remote DND URL - Check URL
-	MENU MAPPING	Parameters required →
	USER STATUS COLOUR	phone≕value - (To check phone exist in DND.) URL :- Return >         0 = NMI in DND         Click on this button after
<u> </u>	USER MODE PERMISSION	• 1 = Found in DND • 2 = Database connection or guery error. 1 Enter Local DND URL, if DND <sup>2</sup> . entering local DND URL
	SMS CONFIG	• 3 = Invalid phone number passed. • 4 = API return some error.
	EMAIL CONFIG	<ul> <li>5 = Parameter missing</li> <li>6 = AP not working</li> <li>Click on this button to</li> </ul>
<u> 111</u>	BLACKLIST	Balance - (Printe Board in DRU) OKC Check URL is valid or not     Balance - Printe Board Check URL is valid or not     Balance Check URL is valid or not     Balance
	EXTENSION DETAIL	error = Any error(database,query,etc).
	USER	
	DISPOSITION	
	ZONE DIALING MAP	
	CHAT GROUPS	
	LEAD SOURCE	
	SKILL MASTER	
Step3	: Enter Local DN	D URL, if DND check through the local URL
Step4	: Then click on "U	Jpdate Local DND URL" for set the Local DND URL
Step5	: Click on "Check	URL" button to check that URL is valid or not.
2. R	emote DND Che	<b>ck</b> - 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 :-

		& Vour Alarte
	SIMART DIAL	y rour Alerts 🕡 🔯 denio 🦉 Search
		Dnd Url Add Dnd List Upload Dnd List Search Dnd List
OS .	ACL RULES	http://192.168.1.6/smart/check_dnd.php   Update Local DND URL  Check URL  Click on Remote DND checkbox to enable it
C	USER MODE MASTER	Remote DND URL + Update Remote DND URL Check URL
æ	MENU MAPPING	Parameters required → • phone=value - (To check phone exist in DND.) URL -
	USER STATUS COLOUR	Return > 0 0 = Not in DND c 1 = Fourth Line Character Control Contro
	USER MODE PERMISSION	• 2 = Database connection or query error. • 3 = Invalid phone number passed.
	EMAIL CONFIG	• 4 = AP training some error.     • 5 = Parameter missing.     • 6 = API not working.     3. actoring Remote DND URL
Land .	BLACKLIST	addphone-value - (Phone to add in DND.) URL :-     Return >         o success = Number added in DND.
	EXTENSION DETAIL	o error = Any error(database,query,etc).
	USER	
	CHAT GROUPS	
	LEAD SOURCE	
	SKILL MASTER	
Step3	3: Click on "Remo	te DND check" checkbox to enable it.
Step4	: Then Enter the H	Remote DND URL, if DND check through the TRAI DND database
	and the second	
Sten	Then click on "I	Indate Remote DND URL" for set the Remote DND URL
Step.	. Then eller on t	spade Remote DAD ORE for set the Remote DAD ORE
<b>C</b> ( )		
Stept	S: Click on "Check	t URL" button to check that URL is valid or not
3	3. To Add a sing	gle number in DND follow the s given below:-
-	Į	
Sten1	· Go to DND sub	menu of system configuration
Step		inclue, or system configuration.
<i>a</i> , <i>a</i>		
Step <sub>2</sub>	2: Then click on "A	Add DND List" tab, which is after the DND URL tab
9	≡ SMART DIAL <sup>**</sup>	🦸 Your Alerts 🕕 🥥 demo 🛩 📿 Search
*	CLIENT DIRECTORY	Dnd Url Add Dnd List Upload Dnd List Search Dnd List
O\$	ACL RULES	Number/Numbers
¢۵	USER MODE MASTER	* Add to DND
æ	MENU MAPPING	2. Then click on Add to DND button
	USER STATUS COLOUR	
	SMS CONFIG	Enter the numbers here to add number
Last	EMAIL CONFIG	in local DND database list
	BLACKLIST EXTENSION DETAIL	
	USER	
	DISPOSITION	
	CHAT GROUPS	
	LEAD SOURCE	



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

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*	CLIENT DIRECTORY	Dnd Url Add Dnd List Upload Dnd List Search Dnd List
os.	DND     ACL RULES	Browse         C:\fakepath\clientdnd.csv         + Upload         Image: Reset         • Only csv file.         Uploaded files           Browse         C:\fakepath\clientdnd.csv         + Upload         Image: Reset         • First column heading/phone).         • First column heading/phone).
C.»	USER MODE MASTER	- File max size (2004) - File max size (2006) - File most and (2006)
##	MENU MAPPING	
<b>—</b>	USER STATUS COLOUR	Click on Browse button
9	SMS CONFIG	1. to select the csv file 2. Then click on Upload button
Last	BLACKLIST	
	EXTENSION DETAIL	
	DISPOSITION	
	ZONE DIALING MAP	
	LEAD SOURCE	
	SKILL MASTER	
Step	3: User is suppose	ed to create a csv file via excel sheet in same format mentioned in the dialog box :
	10000	
	Laboration (	
1	pnone	
2	7654321900	
2	0000676640	
3	9889075543	
Sten	A: Once the csy fil	le have been created it is to be unloaded in via the dialog box, to do it click on the "Browse" hutton, which
will	anghla anothar dia	lag have be cleated, it is be uploaded in via the dialog box, to do it effect of the Browse button, which
WIII	enable another una	log box to select the csv the
Step	5: Once file select	ted then click on upload button.
Sten	6. After click on u	inload hutton a nonun window will ask a confirmation message
Step		ipioau oution, a popup whiteow will ask a commination message.
Step	7: 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

0	≡ SMART DIAL <sup>**</sup>	🕴 Your Alerts 💿 🙆 demo 🛩 Q Search
*	CLIENT DIRECTORY	Ded Url Add Ded List Uplead Ded List Search Ded List
08	ACL RULES	Search Humber 2 Search Delete
C.o.	USER MODE MASTER	
=	MENU MAPPING	
	USER STATUS COLOUR	1. Enter the number in textbox to search
	SMS CONFIG	Click on Search button 2. for searching number
	EMAIL CONFIG	in DND database
	BLACKLIST	
	USER	
	DISPOSITION	
	ZONE DIALING MAP	
	LEAD SOURCE	
	SKILL MASTER	1000
Γ.,		
Step3	: Enter/type a nun	nber in search textbox.
Ctore (	. Clipton Comph	Detter
Step <sup>2</sup>	Click on Search	Button.
Step5	: If number availa	ble in local DND database then message shows as "Found in dnc list" otherwise message shows that "Not
1. in		
farmer	lin due liet?	
Tound	i in and list	
10.00		
100		
	To doloto o pr	mber from load DND database
(	b. To delete a lit	inder from local DND database:
Step1	: Go to DND sub	menu, of system configuration.
_		
Ston	• Then aliak on "	Nearch DND List? tab. which is after the 'Unload DND List' tab.
Step		bearen DND Eist (ab, which is after the Optoar DND Eist (ab



@	≡ SMART DIAL <sup>30</sup>	🕈 Your Alerts 🕕 🙆 demo 👻 Q Search
*	CLIENT DIRECTORY	Dnd Url         Add Dnd List         Upload Dnd List         Search Dnd List
OS SO	ACL RULES	Search Number
•	DND	
۳.	USER MODE MASTER	
<b>主</b>	MENU MAPPING	
	USER STATUS COLOUR	1. Enter the number in Click on Delete button to delete the
	USER MODE PERMISSION	2. number from local DND database
<i>.</i>	SMS CONFIG	
	EMAIL CONFIG	
	BLACKLIST	
	EXTENSION DETAIL	
	USER	
	DISPOSITION	
	ZONE DIALING MAP	
	CHAT GROUPS	
	LEAD SOURCE	
	SKILL MASTER	

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.

Note: 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.

<i>(</i> <b>1</b> )	SMART DIAL**				🕈 Your Alerts 🛛 🕕	🛞 demo 👻	Q Search	
CLIEN	INT DIRECTORY	Mode Details	0 - 0%					
OR DND		Agent Status						
C) ACL F	RULES	(0)	No Login					
- MENU	NU MAPPING	👗 Mode Details	Agent Status	🙆 Idle Status	Wrapup Status	Talk Status		
USER	R MODE PERMISSION	0	0	00.00.00	00.00.00	00.00.00		
USER	R STATUS COLOUR							
SMS	CONFIG	Left click on "	ACL Rules" sub menu					
dil BLAC	CKLIST							
EXTE	ENSION DETAIL							
USER	R							
DISPO	POSITION							
CHAT	T GROUPS							
LEAD	D SOURCE							
ton 2. Me	ow the ACL of	nfiguration	aga appaars og fo	llow				
tep2. No	ow the ACL co	minguration p	age appears as re	bilow.				
- 65		B- 108						
	SMART DIAL**				🕴 Your Alerts 🛛 🕕	🗑 demo 👻	Q Search	
						0		
CLIEN	NT DIRECTORY	# Sense	Rule				Action	
ACL R	RULES	1 permit	10.11.39.0	0/255.255.255.0			<ul> <li>Image: A marked black</li> </ul>	
DND		2 permit	10.11.38.0	0/255.255.255.0				
USER	R MODE MASTER							
MENU	IU MAPPING							
USER	R STATUS COLOUR					Г	Click on Plus `+` icon	
USER	R MODE PERMISSION						to add new ACL Rules	
SMS (	CONFIG		ACL Rules which cr	eated in the system th	at will shows on this page			
EMAI	IL CONFIG							
BLAC	CKLIST							
	ENSION DETAIL							
EXTE								
USER	R							
USER	R							
USER DISPO ZONE	R POSITION E DIALING MAP							
USER DISPO ZONE CHAT	R OSITION E DIALING MAP T GROUPS							
EXTER USER DISPO ZONE CHAT LEAD	R COURCE MAD							



Step5: Now add a valid IP address and hit/click save button     Image: Control I address and hit/click save bases and hit/cli
Step5: Now add a valid IP address and hit/click save button
SMART DIAL*       Year Addity       Or and and addity         Control Direction       Description       Description       Description         Control Direction       Description       Description       Description         Control Direction       Description       Description       Description         Control Direction       Description       Description       Description       Description         States Description       Description       Description       Description       Description       Description         States Description       Description       Description       Description       Description       Description       Description       Description         States Description
Image: State of the state
Step6: We can see the a new record is added :-          Step6: We can see the a new record is added :-         Image: SMART DIAL************************************
Step6: We can see the a new record is added :-          Step6: SMART DIAL**
Step5: We can see the a new record is added :-          Image: State of the stat
Use Mode PERMassion BANK COMPO BANK COMP
2. Enter the subnet mask here BLACKLIST USER DISPOSITION DONE DIALNO MAP DIATO DOUPS SKILL MARTER Step6: We can see the a new record is added :- Step6: We can see the a new record is added :- Step6: We can see the a new record is added :- Step6: Vour Alerts C C C C C C C C C C C C C C C C C C C
BLACKLIST USER STEPESTOR ZOHE DIALING MAP CHAT ROOUPS ENLIL MATTER Step6: We can see the a new record is added :- Step6: We can see the a new record is added :- Step6: User Net DIAL* CONTRACTOR CONTRA
UBBOSTRON DISPOST ELEADOURS BILL MATTER Step6: We can see the a new record is added :-
ZONE DIALING MAP CHAT GROUPS EXAD SOURCE SYILL MAETER Step5: We can see the a new record is added :-
Step6: We can see the a new record is added :-          Image: SMART DIAL*       Image: Smart Dial*         Image: Smart Dial*       Image: Smart Dial* </td
Step6: We can see the a new record is added :-
Step6: We can see the a new record is added :-
Image: Smart Dial     Image: Smart Dial       Image: Smart Dial
SMART DIAL**     CLIENT DIRECTORY     CLIENT DIRECTORY     Obd     Dbd     Dbd     C*     Culent Directory     C*     C*     UBE MODE FRAMISSION     USE MODE FERMISSION     USE NODE
CLERT DIRECTORY     Sense     Rule       OR     DNO     1 permit     10.11.38.0/255.255.250.0       O     USER MODE NASTER     3 permit     192.168.1.0/255.255.250.0       USER MODE PERMISSION     USER MODE PERMISSION     Image: Comparison of the compar
• ACL RULES     2 permit     10.11.38.0/255.255.00       • MENU MARPINO       • USER MODE PERMISSION       • USER MODE PERMISSION       • SMS CONFIG       • EMAIL CONFIG
MENU MAPPING     3 permit     192.168.1.0/255.255.0       USER MODE FERMISSION     USER STATUS COLOUR       SMS CONFIG       EMAIL CONFIG
COLE MADE DE LA MODE DE LA M
SMS CONFIG EMAIL CONFIG
EXTENSION DETAIL
USER DISPOSITION
ZONE DIALING MAP CHAT GROUPS
LEAD SOURCE SKILL MASTER
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.



	= SMART DIAL			Your Alerts 🕛 🤇 🦕 demo 👻 📿 Search
1	CLIENT DIRECTORY			¢ +
-02	ACL RULES	7 sense	10 11 39 0/255 255 255 0	Action
~~	DND	2 permit	10.11.39.0/255.255.255.0	
<b>C</b> .	USER MODE MASTER	z permit	10.11.38.0/255.255.255.0	
-	MENU MAPPING	3 permit	192.168.1.0/200.200.200.0	
-	USER STATUS COLOUR			Edit
			Edit ACL Rules	
			IP* 192.168.1.0	Click on pencil like icon to open
2	SMS CONFIG		Subnet Mask * 255.255.255.0	1. the edit ACL Rules dialog box
	EMAIL CONFIG		SAVE RESET	
	BLACKLIST			
	EXTENSION DETAIL			2. Change the IP address and
	USER		3 Click on Save button	Sublet mask as required
	DISPOSITION			
	ZONE DIALING MAP			
	CHAT GROUPS			
	LEAD SOURCE			
	SKILL MASTER			
tep	4: Now we can no	tice the change	es has been done	
	3. Delete A	CL Rules:		
his	mechanism enabl	es deleting a sa	aved ACL Rules.	
Steps	s to delete ACL ar	e as follows :-		
Step: Step	s to delete ACL ar 1: Go to system co	e as follows :- onfiguration, H	it ACL Rules sub menu	
tep: tep tep2	s to delete ACL ar 1: Go to system co 2: Now the ACL c	e as follows :- onfiguration, H onfiguration p	it ACL Rules sub menu age appear <mark>s as below =&gt; Cli</mark> ck on t	he "Dele <mark>te" ico</mark> n
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tep: tep tep2	to delete ACL and to be system co to be system	e as follows :- onfiguration, H onfiguration p	it ACL Rules sub menu age appears as below => Click on t	he "Delete" icon
tep: tep tep2	s to delete ACL ar : Go to system co : Now the ACL c SMART DIAL* CLIENT DIRECTORY ACL RULES DND USER MODE MASTER	e as follows :- onfiguration, H configuration p	it ACL Rules sub menu age appears as below => Click on t 10.11.39.0/255.255.0 10.11.38.0/255.255.0 192.168.1.0/255.255.0	he "Delete" icon
tep: tep tep:	s to delete ACL ar : Go to system cc : Now the ACL c : Now the ACL c : SMART DIAL* CLIENT DIRECTORY • ACL RULES DIM USER MODE MASTER MENU MAPPING	e as follows :- onfiguration, H onfiguration p	it ACL Rules sub menu age appears as below => Click on t 10.11.39.0/255.255.255.0 10.11.38.0/255.255.255.0 192.168.1.0/255.255.255.0	he "Delete" icon
tep: tep tep:	s to delete ACL ar : Go to system co : Now the ACL c : Now the ACL c : SMART DIAL* CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER STATUS COLOUR	e as follows :- onfiguration, H configuration p 1 permit 2 permit 3 permit	it ACL Rules sub menu age appears as below => Click on t	he "Delete" icon
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Gtep: Gtep: Gtep: @ @ @ @ @ @ @ @ @ @ @ @ @ @ @ @ @ @ @	s to delete ACL ar : Go to system co : Now the ACL co SMART DIAL* CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPINO USER MODE PERMISSION SMS COMFIG	e as follows :- onfiguration, H configuration p	it ACL Rules sub menu age appears as below => Click on t 10.11.39.0/255.255.255.0 10.11.38.0/255.255.255.0 192.166.1.0/255.255.255.0	he "Delete" icon
Step: Step: Step: © ≪ ≪ ≪ ≪ ~ ≈ ≈ ≈ ≈ ≈ ≈ ≈ ≈	s to delete ACL ar : Go to system cc : Now the ACL c : Now the ACL c : SMART DIAL* CLIENT DIRECTORY • ACL RULES DND • USER MODE MASTER MENU MAPPING USER STATUS COLOUR USER STATUS COLOUR	e as follows :- onfiguration, H onfiguration p	it ACL Rules sub menu age appears as below => Click on t 10.11.39.0/255.255.255.0 10.11.38.0/255.255.255.0 192.168.1.0/255.255.255.0	he "Delete" icon
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Step: Step Step Step2 ≪ ≪ ≪ ≪ ≪	s to delete ACL ar : Go to system co : Now the ACL co : Now the ACL co : SMART DIAL* CLIENT DIRECTORY ACL RULES DND USER MODE PARSTER MENU MAPPING USER MODE PERMISSION SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER	e as follows :- onfiguration, H configuration p	it ACL Rules sub menu age appears as below => Click on t 10.11.39.0/255.255.255.0 10.11.38.0/255.255.255.0 192.168.1.0/255.255.255.0	he "Delete" icon
Step: Step Step Step Step Step Step	s to delete ACL ar : Go to system co : Now the ACL co : Now the ACL co : SMART DIAL* CLIENT DIRECTORY • ACL RULES DND • USER MODE MASTER MENU MAPPING USER STATUS COLOUR USER STATUS COLOUR USER STATUS COLOUR USER STATUS COLOUR USER STATUS COLOUR USER COMPIG BLACKLIST EXTENSION DETAIL USER DIEPOSITION	e as follows :- onfiguration, H onfiguration p	it ACL Rules sub menu age appears as below => Click on t 10.11.39.0/255.255.255.0 10.11.38.0/255.255.255.0 192.168.1.0/255.255.255.0	he "Delete" icon
Step: Step Step Step C C C C C C C C C C C C C C C C C C C	s to delete ACL ar : Go to system co : Now the ACL c : Now the ACL c	e as follows :- onfiguration, H configuration p 1 permit 2 permit 3 permit	it ACL Rules sub menu age appears as below => Click on t 10.11.39.0/255.255.255.0 10.11.38.0/255.255.255.0 192.168.1.0/255.255.255.0	he "Delete" icon
Step: Step Step Step C C C C C C C C C C C C C C C C C C C	S to delete ACL and Control System control Control System Control System Control Control System Control System Control Control System Control Con	e as follows :- onfiguration, H onfiguration p <i>permit</i> 2 permit 3 permit	it ACL Rules sub menu age appears as below => Click on t 10.11.39.0/255.255.255.0 10.11.38.0/255.255.255.0 192.168.1.0/255.255.255.0	he "Delete" icon
Step: Step: Step: C <sup>0</sup> Step: C <sup>1</sup> Step: C <sup>1</sup> Step: C <sup>1</sup> Step: C <sup>1</sup> Step: C <sup>1</sup> Step: C <sup>1</sup> Step: C <sup>1</sup> Step: C <sup>1</sup> Step: C <sup>1</sup> Step: Step	s to delete ACL and : Go to system co : Now the ACL co : Now the ACL co : Now the ACL co : SMART DIAL* CLIENT DIRECTORY ACL RULES DND USER MODE PARTIES USER MODE PARTIES USER USER MODE PARTIES USER USER MODE PARTIES USER MODE	e as follows :- onfiguration, H configuration p	it ACL Rules sub menu age appears as below => Click on t 10.11.39.0/255.255.255.0 10.11.38.0/255.255.255.0 192.168.1.0/255.255.255.0	he "Delete" icon
itep: itep itep itep itep itep: itep: itep: itep: itep: itep: itep: itep: itep: itep: itep itep itep itep	S to delete ACL and S to delete ACL and S to system co S Now the ACL co S NOW th	e as follows :- onfiguration, H onfiguration p	it ACL Rules sub menu age appears as below => Click on t 10.11.39.0/255.255.255.0 10.11.38.0/255.255.255.0 192.168.1.0/255.255.255.0	the "Delete" icon

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

0	≡ SMART DIAL <sup>**</sup>			🕴 Your Alerts 🛛 🕕	🛞 demo 👻	Q Search
*	CLIENT DIRECTORY	# 50000	Dute			¢ +
08	DND	1 permit	10.11.39.0/255.255.255.0			Action
	ACL RULES	2 permit	10.11.38.0/255.255.255.0		/	/ =
<b>C</b> <sup>20</sup>	USER MODE MASTER	3 permit	192.168.1.0/255.255.255.0			
	MENU MAPPING					
	USER MODE PERMISSION					
-	USER STATUS COLOUR			C	lick on this icon for	Reload the
<i>S</i>	SMS CONFIG			cl	nanges in ACL Rules	
	EMAIL CONFIG					
40	BLACKLIST					
	EXTENSION DETAIL					
	USER					
	DISPOSITION					
	ZONE DIALING MAP					
	CHAT GROUPS					
	LEAD SOURCE					
	SKILL MASTER					

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:

<u>@</u>		10			🕴 Your Alerts 🛛 🕕	🛞 demo 👻	Q Search
*		Reload Success on:	10.11.39.12				φ +
-	CLIENT DIRECTORY	# Sense		Rule			Action
08	DND	1 permit		10.11.39.0/255.255.255.0			/ 🗉
<b>e</b> 10	ACL RULES	2 permit	$\langle \rangle$	10.11.38.0/255.255.255.0			2 🗉
۳.	USER MODE MASTER	3 permit	$\langle \rangle$	192.168.1.0/255.255.255.0			2 🗉
ŧ	MENU MAPPING						
	USER MODE PERMISSION						
-	USER STATUS COLOUR						
$\square$	SMS CONFIG		Re	sponse shows here for Reload			
	EMAIL CONFIG						
<u>dtl</u>	BLACKLIST						
	EXTENSION DETAIL						
	USER						
	DISPOSITION						
	ZONE DIALING MAP						
	CHAT GROUPS						
	LEAD SOURCE						
	SKILL MASTER						



# 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:

0	≡ SMART DIAL**				🖗 Your Alerts 🛛 💿	🙆 demo 🔫	Q Search
	CLIENT DIRECTORY	Mode Details ( <b>O )</b>					
	DND	Agent Status	0 - 0%				
	USER MODE MASTER	(0)	No Login				
	MENU MAPPING	Mode Details	<ul> <li>Agent Status</li> </ul>	Idle Status	Wrapup Status	Talk Status	
	USER MODE PERMISSION	0	0	00:00:00	00:00:00	00:00:00	
	USER STATUS COLOUR						
2	SMS CONFIG	Click on User	Mode Master sub menu				
	EMAIL CONFIG	Cilck off Ober	mode master sub-mena				
<u></u>	BLACKLIST						
	EXTENSION DETAIL						
	USER						
	DISPOSITION						
	ZONE DIALING MAP						
	CHAT GROUPS						
	LEAD SOURCE						

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

	≡ SMART DIAL <sup>**</sup>				🕴 Your Alerts 💿 😡	demo - Q Search
*	CLIENT DIRECTORY				φ 👼	+
-	ACL RULES		User Mode	Recall Permission	Action	
<b>1</b> 00	DND	1	Manual			
<b>C</b> ®		3	Callback			
<u> </u>	USER MODE MASTER	4	Progressive			
筆	MENU MAPPING	5	Мо			
	USER STATUS COLOUR	6	Preview			
-	USER MODE PERMISSION	7	٦ Break			
2	SMS CONFIG	8	TeaBreak		<ul> <li>Image: A set of the set of the</li></ul>	
	EMAIL CONFIG					
<u>htt</u>	BLACKLIST					
	EXTENSION DETAIL			Tick /Uptick	the checkboy to enable (dicable	
	USER			the callbac	k facility in mode	
	DISPOSITION					
	ZONE DIALING MAP					
	CHAT GROUPS					
	LEAD SOURCE					
	SKILL MASTER					



#### 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.

Create New User Mode	×
User Mode*	

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

	SMART DIAL <sup>™</sup>				🐐 Your Alerts 🛛 💿	🔕 demo 👻	Q Search
s ci	LIENT DIRECTORY	211				\$ <b>B</b> +	
e Al	CL RULES		User Mode Auto	Recall Permission	Action		
- DI	ND	2	Manual				
- 10	SER MODE MASTER	3	Callback				
-		1	Progressive				
		2	Mo	User Mode"			
	SER STATUS COLOUR	°/	Preview	Refreshment			
U	SER MODE PERMISSION	1	7 Break				
SI	MS CONFIG	8	TeaBreak			1. in User mode t	e name rextbox
E	MAIL CONFIG						
BI	LACKLIST						
E	KTENSION DETAIL						
U	SER						
DI	ISPOSITION				Save Cancel		
Z	ONE DIALING MAP						
C	HAT GROUPS			2. Then	Llick on Save button		
LE	EAD SOURCE						
SI	KILL MASTER						

# Step4: Then click on Save button

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

0	$\equiv$ SMART DIAI				🕴 Your Alerts 🛛 🕕	lemo 👻	
	CLIENT DIRECTORY						
	USER MODE MASTER	4		Liser Mode Created	×		
	MENU MAPPING	5		eady	exist.		
	USER STATUS COLOUR	6	Preview				
	USER MODE PERMISSION	7	7 Break	ок			
	SMS CONFIG	8	TeaBreak				
	EMAIL CONFIG	9					
	BLACKLIST						
	EXTENSION DETAIL						
	USER						
	DISPOSITION				Save Cancel		
	ZONE DIALING MAP						
	CHAT GROUPS						
	LEAD SOURCE						
	SKILL MASTER						



	2.0				0	( - manual and the second
SMART DIAI	-			🦩 Your Alerts 🛛 🕕	🍥 demo 👻	Q Search
					¢ 🔋 +	
	#	User Mode	Recall Permission	Action		
ACL RULES	1	Auto				
DND	2	Manual				
USER MODE MASTER	3	Callback				
MENU MAPPING	4	Progressive				
USER STATUS COLOUR	6	Preview				
USER MODE PERMISSION	7	٦ <sup>Break</sup>				
SMS CONFIG	8	TeaBreak		×		
EMAIL CONFIG	9	Refreshment		×		
BLACKLIST		_				
EXTENSION DETAIL						
USER						
DISPOSITION						
ZONE DIALING MAP						
CHAT GROUPS						
LEAD SOURCE						
SKILL MASTER						

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.

SMART DIAL" SMART DIAL TANKEN SMART DIAL TANK					The second se		
3: Change the Refreshment into Lunch_Break, and then click on update button.	SMART DIAL			🐬 Your Alerts 🛛 💽	🕨 🙆 demo 👻		
3: Change the Refreshment into Lunch_Break, and then click on update button.					( <b>a</b> ) <b>+</b> )		
3: Change the Refreshment into Lunch_Break, and then click on update button.		User Mode	Recall Permission	Action		^	
3: Change the Refreshment into Lunch_Break, and then click on update button.	ACL RULES	Auto					
B: Change the Refreshment into Lunch_Break, and then click on update button. 4: Now we can see the mode has changed.	UND	Callback					
B: Change the Refreshment into Lunch_Break, and then click on update button. 4: Now we can see the mode has changed.	USER MODE MASTER	Progressive					
3: Change the Refreshment into Lunch_Break, and then click on update button.	MENU MAPPING	Mo					
BY AND COMPTONE THE ANALYSIC OF THE ANALYSIC O	USER STATUS COLOUR	Preview					
BLACKLEY EXTENSION DETAIL USER USER USER DISPOSITION ZONE DULING MAP HAT ORDURS ENCLU MASTER Change the Refreshment into Lunch_Break, and then click on update button. 4: Now we can see the mode has changed.	USER MODE PERMISSION	] Break					
EXALL CONFIG EXALL CONFIG EXALL CONFIG EXALL SOLUTION EXALL SOLUTION EVENT OF ADDRESS EVENT OF ADDRESS EVEN OF ADDRESS	SMS CONFIG	TeaBreak		<ul> <li>Image: A set of the set of the</li></ul>			
Click on Edit icon DisPosition Address Click on Edit icon Click on Edit icon Click on Edit icon S: Change the Refreshment into Lunch_Break, and then click on update button. A: Now we can see the mode has changed.	EMAIL CONFIG	Refreshment					
Click on Edit icon USPORTON CNUC MADE CLICK ON Edit icon CLICK ON Edit icon	BLACKLIST			Edit			
Control Control Marken Control Control Marken Control Control Marken Control Control Marken Control Control Marken Control Control Marken Control Marken	EXTENSION DETAIL		- C6-	tk on Edit icon			
BISPOSITION ZOHAT ABOURS ELAD SOURCE BKILL MAGTER B: Change the Refreshment into Lunch_Break, and then click on update button. 4: Now we can see the mode has changed.	USER						
2: Change the Refreshment into Lunch_Break, and then click on update button. 4: Now we can see the mode has changed.	DISPOSITION						
Change the Refreshment into Lunch_Break, and then click on update button. Now we can see the mode has changed.	ZONE DIALING MAP						
EXAMPLE MAGTER B: Change the Refreshment into Lunch_Break, and then click on update button. 4: Now we can see the mode has changed.	CHAT GROUPS						
BULL MATTER B: Change the Refreshment into Lunch_Break, and then click on update button. 4: Now we can see the mode has changed.	LEAD SOURCE						
3: Change the Refreshment into Lunch_Break, and then click on update button. 4: Now we can see the mode has changed.	SKILL MASTER					~	
	3: Change the Refre	shment into Lunch_B	reak, and then clic	k on update but	ton.		



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

)	$\equiv$ SMART DIAL <sup>**</sup>				🐐 Your Alerts	s 💿 😡 demo 👻 🔍 S	Search
	CLIENT DIRECTORY					Ø <b>#</b> +	
	ACL RULES	1	User Mode	Recall Permission	Action	Delete	
•	DND	2	Manual				
		3	Callback			1	
-		4	Progressive				
	MENU MAPPING	5	Mo				
	USER STATUS COLOUR	6	Preview				
	USER MODE PERMISSION	7	- Break				
	SMS CONFIG	8	TeaBreak		<ul> <li>Image: A set of the set of the</li></ul>		
-	EMAIL CONFIG	9	Refreshment		<ul> <li>Image: A set of the set of the</li></ul>		
	BLACKLIST						
	EXTENSION DETAIL				2.	Click on Delete icon	
	USER		1. Tick on Checkbox	to select it			
	DISPOSITION						
	ZONE DIALING MAP						
	CHAT GROUPS						
	LEAD SOURCE						
	SKILL MASTER						

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

CLIENT DIRECTORY						
ACL RULES	#	User Mode Auto	Recall Permission			
DND	2	Manual				
USER MODE MASTER	3	Callback				
	4	Progressive	Delete selected User Mode ?.			
	5	Mo				
	7	Break	OK Cancel			
USER MODE PERMISSION						
SMS CONFIG	8	TeaBreak				
EMAIL CONFIG	9	Refreshment		1		
BLACKLIST						
EXTENSION DETAIL						
USER						
DISPOSITION						
ZONE DIALING MAP						
CHAT GROUPS						
LEAD SOURCE						
					*	



## 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.





#### Step4: Then do the steps as demonstrated in below picture SMART DIAL 4 Your Alerts 🕕 ( demo 1 CLIENT DIRECTORY Main Menu User Mapping Sub Menu User Mapping Super Sub Menu User Mapping ACL RULES Main Menu User Sub Menu User Super Sub Menu User DND abhinav abhinav 🔲 abhinav USER MODE MASTER System Configuration 1 Campaign Management/ O Campaign 1 **V**. rahul 🔽 rahul 🔽 rahul santosh santosh santosł MENU MAPPING Telephony Configuration2 C Lead Management 2 CRM Configuration 2 rakesh rakesh rakesh USER STATUS COLOUR Other Management Campaign Queue 3 3 Operational Configuration 3 Ģ USER MODE PERMISSION 6 Mapping 4 Monitoring 4 Tick on user to map 4 2. SMS CONFIG Campaign Transfer mapping the super sub menu Tick on user to map the 5 5 Tick on user to map the Quality to user EMAIL CONFIG sub menu to user menu to user Analytics 6 Callback - Re schedule6 BLACKLIST Click on radio button to 5. Email Template EXTENSION DETAIL enable the sub menu user Click on radio button to USER SMS Template 8 Click on radio button enable the super sub to enable the main menu user 9 DISPOSITION File Category menu user ZONE DIALING MAP Music On Hold 10 CHAT GROUPS O User Mapping to DID 10 LEAD SOURCE SMS Disp Mapping 11 SKILL MASTER

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.

0	≡ SMART DIAL <sup>**</sup>				🕴 Your Alerts 🛛 💿	🙆 demo 👻	Q Search
*	CLIENT DIRECTORY	Mode Details	0 - 0%				
OS.	ACL RULES						
	DND	(O)					
C.a	USER MODE MASTER		NO LOGIN				
=	MENU MAPPING	Mode Details	Agent Status	die Status	Wrapup Status	Talk Status	
	USER MODE PERMISSION	0	0	00:00:00	00:00:00	00:00:00	
<u> </u>	USER STATUS COLOUR						
<b>_</b>	SMS CONFIG						
	EMAIL CONFIG	Click on User M	ode Permission sub menu	7			
	BLACKLIST	cilck off osci in	oue remission sub menu				
	EXTENSION DETAIL						
	USER						
	DISPOSITION						
	ZONE DIALING MAP						
	CHAT GROUPS						
	LEAD SOURCE						
Step2	2: Now User Mode	Permission p	bage open as follo	OWS:			



CLIENT DIRECTORY   ACL RULES   DND   OND   USER MODE MASTER   USER MODE MASTER   USER MODE PERMISSION   USER MODE PERMISSION   SMS CONFIG   EMAIL CONFIG   BLACKLIST   EXTENSION DETAIL   USER   DISPOSITION   ZONE DIALING MAP   CHAT GROUPS   LEAD SOURCE	۲	$\equiv$ SMART DIAL <sup>**</sup>		🕴 Your Alerts 🛛 🕕	lemo 👻	Q Search
ACL RULES   DND   USER MODE MASTER   MENU MARPING   USER STATUS COLOUR   USER MODE PERMISSION   SMS CONFIG   EMAIL CONFIG   EMAIL CONFIG   EMAIL CONFIG   EMAIL CONFIG   EXTENSION DETAIL   USER   USER TOUPS   LEAD SOURCE   CHAT GROUPS   LEAD SOURCE	*	CLIENT DIRECTORY	User Id	User Mode		
DND   USER MODE MASTER   MENU MAPPING   USER STATUS COLOUR   USER MODE PERMISSION   SMS CONFIG   EMAIL CONFIG   EMAIL CONFIG   EMAIL CONFIG   EXTENSION DETAIL   USER   USER   DIPOSITION   ZONE DIALING MAP   CHAT GROUPS   LEAD SOURCE   SKUL MASTER	02	ACL RULES	kamal			
USER MODE MASTER   MENU MAPPING   USER STATUS COLOUR   USER MODE PERMISSION   SMS CONFIG   EMAIL CONFIG   EMAIL CONFIG   BLACKLIST   EXTENSION DETAIL   USER   USER   DISPOSITION   ZONE DIALING MAP   CHAT GROUPS   LEAD SOURCE   SKULL MASTER		DND				
<ul> <li>MENU MAPPING</li> <li>USER STATUS COLOUR</li> <li>USER MODE PERMISSION</li> <li>SMS CONFIG</li> <li>EMAIL CONFIG</li> <li>BLACKLIST</li> <li>EXTENSION DETAIL</li> <li>USER</li> <li>DISPOSITION</li> <li>ZONE DIALING MAP</li> <li>CHAT GROUPS</li> <li>LEAD SOURCE</li> <li>SKILL MASTER</li> </ul>	<b>C</b> %)	USER MODE MASTER				
USER STATUS COLOUR USER MODE PERMISSION SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION ZONE DIALING MAP CHAT GROUPS LEAD SOURCE SKUL MASTER	=	MENU MAPPING				
USER MODE PERMISSION USER MODE PERMISSION SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION ZONE DIALING MAP CHAT GROUPS LEAD SOURCE SKUL MASTER		USER STATUS COLOUR				
SMS CONFIG       EMAIL CONFIG       BLACKLIST       BLACKLIST       EXTENSION DETAIL       USER       DISPOSITION       ZONE DIALING MAP       CHAT GROUPS       LEAD SOURCE       SKILL MASTER	-	USER MODE PERMISSION	to load the User mode			
EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION ZONE DIALING MAP CHAT GROUPS LEAD SOURCE EXTL MASTER	P	SMS CONFIG				
Liti     BLACKLIST       EXTENSION DETAIL       USER       DISPOSITION       ZONE DIALING MAP       CHAT GROUPS       LEAD SOURCE       SKILL MASTER		EMAIL CONFIG				
EXTENSION DETAIL USER DISPOSITION ZONE DIALING MAP CHAT GROUPS LEAD SOURCE SKILL MATER	<u>htt</u>	BLACKLIST				
USER DISPOSITION ZONE DIALING MAP CHAT GROUPS LEAD SOURCE SMIL MATER		EXTENSION DETAIL				
DISPOSITION ZONE DIALING MAP CHAT GROUPS LEAD SQURCE		USER				
ZONE DIALING MAP CHAT GROUPS LEAD SOURCE		DISPOSITION				
CHAT GROUPS LEAD SOURCE SKILL MASTER		ZONE DIALING MAP				
LEAD SOURCE		CHAT GROUPS				
SKILLMASTER		LEAD SOURCE				
UNLE MINUTER		SKILL MASTER				
	Step?	3: 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:

								4 \	/our Alerts 🦷		demo 💌	O Searc	:h
9	_ OWART DIAL	Chanture	Defeult	Calas 4 Min	Calas 2 Min	Calas 2 Min	Calas 4 Min	Calas 6 Min	Calas C Min	Color 7 Min	Calas 8 Min	Calas 0 Mile	Colora do Mir
*	CLIENT DIRECTORY	ON CALL	#D6ADEE	#6ec24e	#cfbf65	#97ab61	Color 4 Min	#e0aa46	#83bd4a	#42cf8d	Color 8 Min	#d99880	#decc73
		HANG UP	#99C2EB	W628f96	#52a2f2	#40d6d6	#58d3a7	W646124	#86d660	#d48919	#9ce346	#dec614	#eb2a15
08		READY	#85E085	#675e69	#18a81c	#802680	#f22c2c	#269444	#46524b	#dbb435	#d48c7f	#9c9e5d	#7a8c7a
e 1)	DND	RINGING	#58D3A7	#58d3a7	#58D3A7	#58d3a7	#58D3A7	#58D3A7	#58D3A7	#58D3A7	#58D3A7	#58D3A7	#58D3A7
<b>C</b> *	USER MODE MASTER	DIALING	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#084#5#	#58D3F7	#58D3F7	#58D3F7
	MENU MAPPING	MUTE	#18F3A1	#18f3a1	#18F3A1	#18F3A1	#18F3A1	#18F3A1	#18F3A1	#18F3A1	#5dc754	#18f3a1	#18f3a1
	USER STATUS COLOUR	HOLD	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5
		MISSED	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#daafde	#f0c741	#edc132
	USER MODE PERMISSION	BARGE	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d
<u>_</u>	SMS CONFIG	INFO	#c96336	#c96336	#c96336	#c96336	#c96336	#c96336	#c96336	#c96336	#c96336	#c96336	#c96336
	EMAIL CONFIG	COACH	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8
dil 1	BLACKLIST	TL CONF	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3
		REJECTED	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741
	EXTENSION DETAIL												
	USER												
	DISPOSITION												
	ZONE DIALING MAP												
	CHAT GROUPS												
	LEAD SOURCE												
	SKILL MASTER												

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

									/our Alerts (	. @		Q Searc	h
	_	Status	Default	Color 1 Min	Color 2 Min	Color 3 Min	Color 4 Min	Color 5 Min	Color 6 Min	Color 7 Min	Color 8 Min	Color 9 Min	Color >= 10 Min
	CLIENT DIRECTORY	ON CALL	#D6ADFF	#6ec24e	#cfbf65	#97ab61	#7a5422	#e0aa46	#83bd4a	#42cf8d	- MARANY 2	#d99880	#decc73
æ	ACL RULES	HANG UP	#99C2EB	#628f96	#52a2f2	#40d6d6	#58d3a7	#545324	#86d660	#d48919	#9ce346	#dec614	#eb2a15
•	DND	READY	#85E085	#675e69	#18a81c	#802680	#f22c2c	#269444	#4b524b	#dbb435	#d48c7f	#9c9e5d	#7a8c7a
»		RINGING	#58D3A7	#58d3a7	#58D3A7	#58d3a7	#58D3A7	#58D3A7	#58D3A7	#58D3A7	#58D3A7	#58D3A7	#58D3A7
	USER MODE MASTER	DIALING	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#084a5e	#58D3F7	#58D3F7	#58D3F7
	MENU MAPPING	MUTE	#18F3A1	#18f3a1	#18F3A1	#18F3A1	#18F3A1	#18F3A1	#18F3A1	#18F3A1	#5dc754	#18f3a1	#18f3a1
	USER STATUS COLOUR	HOLD	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5
	LISER MODE REPAILSSION	MISSED	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#daafde	#f0c741	#edc132
- 1		BARGE	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf51	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d
	SMS CONFIG	INFO	#c96336	#c96336	#c96336	#c96336	#c96336	#c96336	#c96536	#c96336	#c96336	#c96336	#c96336
-	EMAIL CONFIG	COACH	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8	#1763a8	#1353a8	#1353a8	#1353a8	#1353a8
	BLACKLIST	TL CONF	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3
-		REJECTED	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741
									/				
	USER							Cli	ck on colou	r code to			
	DISPOSITION							ор	en the colo	ur picker			
	ZONE DIALING MAP												
	CHAT GROUPS												
	LEAD SOURCE												
	SKILL MASTER												

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

۲	$\equiv$ SMART DIAL <sup>*</sup>	3						4	/our Alerts (		demo 👻	Q Searc	h
		Status	Default	Color 1 Min	Color 2 Min	Color 3 Min	Color 4 Min	Color 5 Min	Color 6 Min	Color 7 Min	Color 8 Min	Color 9 Min	Color >= 10 Min
	CLIENT DIRECTORY	ON CALL	#D6ADFF	#6ec24e	#cfbf65	#97ab61	#7a5422	#e0aa46	#83bd4a	#42cf8d	- ######2	#d99880	#decc73
100	ACL RULES	HANG UP	#99C2EB	#628f96	#52a2f2	#40d6d6	#58d3a7	#54542#	#86d660	#d48919	#9ce346	#dec614	#eb2a15
- <b>*</b> **		READY	#85E085	#675e69	#18a81c	#802680	#f22c2c	#269444	#4b524b	#dbb435	#d48c7f	#9c9e5d	#7a8c7a
<b>C</b> 0)		RINGING	#58D3A7	#58d3a7	#58D3A7	#58d3a7	#58D3A7	#58D3A7	#58D3A7	#58D3A7	#58D3A7	#58D3A7	#58D3A7
	USER MODE MASTER	DIALING	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#58D3F7	#084a5e	#58D3F7	#58D3F7	#58D3F7
	MENU MAPPING	MUTE	#18F3A1	#18f3a1	#18F3A1	#18F3A1	#18F3A1	#18F3A1	#18F3A1				#18f3a1
	USER STATUS COLOUR	HOLD	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5	#25f5f5			R	#25f5f5
		MISSED	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741				#edc132
	USER MODE PERMISSION	BARGE	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d	#c7cf5d		0	B	#c7cf5d
2	SMS CONFIG	INFO	#c96336	#c96336	#c96336	#c96336	#c96336	#c96336	#c96336			# 084	#c96336
	EMAIL CONFIG	COACH	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8	#1353a8			ОК	#1353a8
labil	BLACKUST	TL CONF	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#189fa3	#1891a3	#189183	#189183	#189fa3
	BLACKEIST	REJECTED	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741	#f0c741
	EXTENSION DETAIL												2.
	USER									1.		buttor	to apply the
	DISPOSITION								— Г	Select the c	olour here	colour	code
	ZONE DIALING MAP												
	CHAT GROUPS												
	LEAD SOURCE												
	SKILL MASTER												



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.





Route name		
SMS API *		
Note : Parameter value with open qu	iotes like `value` assumed as variable.	
	`mobile_no`	
	`message`	

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

	≡ SMART DIAL <sup>**</sup>				lerts 💿 🙆 demo 👻
*		7777777	Create New SMS Configuration		
		Route Name	Route name *		
05			Testing	1.	Enter the SMS route name here for identification
C <sup>-3)</sup>		10000	SMS API *		for identification
		10000	Note · Parameter value with onen quotes like `value` a	2.	Enter the SMS API here which
12 A		111111	Parameter Name	Parameter Value	provided by the sivis vehicor
		00000	То	`mobile_no`	
		00000	Text	`message`	
<i>S</i>	SWIS CUNFIG	111111	3.		
Land	EMAIL CONFIG		Enter the Parameter name here		
	BLACKLIST	11/1/1	which provided by the SMS Vendor		
	EXTENSION DETAIL	111111			
	USER	111111			
	DISPOSITION	•			
	ZONE DIALING MAP	111111		Click on Save but	ton
	CHAT GROUPS	111111	4.	click off Save But	
	LEAD SOURCE	11111			Save Cance
Step6	: Enter the SMS of	configuration	n as follows:		
For ex	<u>kample</u>				
(i) Ro	ute name* - Ente	r route name	e for example 'Testing'		
(ii) Sl	MS API – for exa	mple '' <u>http://</u>	/smsapi.com/" (provided by SI	MS vendor)	
(iii) P	arameter Name 1	– To (for M	lobile number, provided by SM	AS vendor)	
(iv) P	arameter Value 1	– `mobile_r	no` (fixed value in configuration	on for mobil	le number)
(v) Pa	rameter Name 2	- Text (For r	nessage, provided by SMS ver	ndor)	


(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.

	≡ SMART DIAL <sup>*</sup>							•	demo 👻	Q Se		
*	ACL RULES							<b>\$</b>	<b>a</b> +			
	USER MODE MASTER	Route Name	API	Param 1	Param 2	Param 3	Param 4	Param 5	Param 6	Param 7	Param 8	Pa
00	MENU MAPPING	Testing	http://smsapi.com/	То	Text							
<b>(</b> ))	USER STATUS COLOUR											
	USER MODE PERMISSION											
筆	<ul> <li>SMS CONFIG</li> </ul>											
	EMAIL CONFIG											8
	BLACKLIST											
2	EXTENSION DETAIL											
.til	USER											
_	DISPOSITION											
	ZONE DIALING MAP											
	CHAT GROUPS											
	LEAD SOURCE	•	III									F
	SKILL MASTER											
	DEFAULT AUTO LOGIN											
	ACTIVITY											

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.

0	≡ SMART DIAL <sup>**</sup>				🐐 Your Alerts 🛛 🕕	lemo 👻	Q Search
**	USER STATUS COLOUR	Mode Details (	0 ▾ 0% No Login				
••••	SMS CONFIG     EMAIL CONFIG	Agent Status (0)	0 - 0% No Login				
=	BLACKLIST	A Mode Details	Agent Status	dle Status	Wrapup Status	Talk Status	
	EXTENSION DETAIL	0	0	00:00:00	00:00:00	00:00:00	
	DISPOSITION						
Lui	CHAT GROUPS	Click on S	MS Config sub menu				
	LEAD SOURCE						
	DEFAULT AUTO LOGIN						
	ACTIVITY DATASET						
	DATASET CONFIG						



Step	2:	Now the SMS C	onfig page a	appears as follo	ws:								
(	-6	≡ SMART DIAL <sup>™</sup>						Your Alerts	• (	demo 👻	Q Se	arch	
<b>*</b>		ACL RULES							ø	• +			
		USER MODE MASTER	Route Name	API	Param 1	Param 2	Param 3	Param 4	Param 5	Param 6	Param 7	Param 8	Pa
03		MENU MAPPING	Testing	http://smsapi.com/	То	Text							
േ		USER STATUS COLOUR											
		USER MODE PERMISSION											
	•	SMS CONFIG											
		EMAIL CONFIG											10
		BLACKLIST											
<i>~</i>		EXTENSION DETAIL											
land		USER											
		DISPOSITION											
		ZONE DIALING MAP											
		CHAT GROUPS											
		LEAD SOURCE	•	m									F
		SKILL MASTER											
		DEFAULT AUTO LOGIN											
		ACTIVITY											

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

Step:   Step: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	0					
Step:: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		≡ SMART DIAL <sup>**</sup>			17 Your Alerts 💿 😡 demo 👻 Q Search	
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		_			Φ = +	
Sep5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		CAMPAIGN MANAGEMENT • Campaign	aram 10 Value 1	Value 2	Value 3 Value 4 Value 5 Value 6 Value 7 Value 8 Value 9 Value 10 Action	
Step:: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	-08	CRM Configuration	`mobile_no`	`message`		
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	C.	Campaign Queue				
Step4: After clicking on that icon, it will open up a dialog box that enables editing of data.          Image: Click on edition         Image: Click on update         Image: Click on update </td <th></th> <td>• Mapping</td> <td></td> <td></td> <td></td> <td></td>		• Mapping				
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		Campaign Transfer mapping     Callback - Re schedule			Click on edit icon	
Step: A fler clicking on that icon, it will open up a dialog box that enables editing of data.          Image: Step: A fler clicking on that icon, it will open up a dialog box that enables editing of data.         Image: Step: A fler clicking on that icon, it will open up a dialog box that enables editing of data.         Image: Step: A fler clicking on that icon, it will open up a dialog box that enables editing of data.         Image: Step: A fler clicking on that icon, it will open up a dialog box that enables editing of data.         Image: Step: A fler clicking on that icon, it will open up a dialog box that enables editing of data.         Image: Step: A fler clicking on that icon, it will open up a dialog box that enables editing of data.         Image: Step: A fler clicking on that icon, it will open up a dialog box editing option available on SMS API, parameter name and parameter value which is not         Step: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		• Email Template				
Image:		SMS Template				
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		• File Category				
Step: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	Litt	User Mapping to DID				
Step:: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		• SMS Disp Mapping				
Step4: After clicking on that icon, it will open up a dialog box that enables editing of data.		LEAD MANAGEMENT				
Step: After clicking on that icon, it will open up a dialog box that enables editing of data.          Image: state of the state of		Import Lead	*			
Step4: After clicking on that icon, it will open up a dialog box that enables editing of data. <b>Click Configuration Parameter value Parameter value Parameter value Parameter value Click on Update Update</b> Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		• Assign Lead				
Step4: After clicking on that icon, it will open up a dialog box that enables editing of data.          Image: Click on Update Dutton		CeM Data				
Step4: After clicking on that icon, it will open up a dialog box that enables editing of data.		• Callback Assign				
Step4: After clicking on that icon, it will open up a dialog box that enables editing of data.		Contraction of the local division of the loc				
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	C +			11	n a dista di standi la salti na diti na Calata	
Edit SMS Configuration         Resting         SMS API         Interview         Parameter value         Parameter value         Parameter value         Parameter value         Imposition         Edit option available on SMS API, parameter name and Parameter         Imposition         Click on Update button         Update	Step-	+. After checking o	ii tilat icoli, it wi	in open u	p a dialog box that enables editing of data.	
Edit SAS Configuration       Parameter Name         Review Name						
Edit SMS Configuration       To         Testing       SMS API         SMS API       Image: SMS API         Inttp://smsapl.com/       Parameter value         Parameter value       Parameter Value         To       Image: SMS API         Text       Image: SMS API, Image: SMS API						
Rote Name *         Testing         SMS API *         http://smsapl.com/         Not : Parameter value with open quotes like 'value' assumed as variable.         Parameter value         To         To         Text         Bedit option available on SMS API,         parameter name and Parameter         Value which is not fixed         Click on Update button         2.         Update	Ed				×	
Testing         MS AFI-         Inttp://smsapl.com/         Note : Parameter value with open quotes like 'value' assumed as variable.         Parameter Name         Parameter Name         Parameter Name         Parameter Value         Imobile_no'         Text         Imobile_no'         Text         Imobile_no'         Imessage'         Image: Click on Update button         2.         Update             Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	Re	ute Name *			·	
SMS API*         http://smspl.com/         Parameter value with open quotes like 'value' assumed as variable.         Parameter value         To         Text         Edit option available on SMS API,         parameter name and Parameter         Value which is not fixed         Update         Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	T	esting				
Note : Parameter value with open quotes like 'value' assumed as valiable.         Parameter Name         To         To         Text         Edit option available on SMS API, parameter name and Parameter value which is not fixed         Click on Update button         2.         Update	SI	IS API				
Note : Parameter value with open quotes like 'value' assumed as variable. Parameter Value To Text I. Edit option available on SMS API, parameter name and Paramter value which is not fixed Click on Update button 2: Update Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	ht	ttp://smsapi.com/				
Parameter Name To Text Edit option available on SMS API, parameter name and Paramter value which is not fixed Click on Update button 2. Update Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	No	te : Parameter value	with open quotes	like `value	e` assumed as variable.	
To Text Edit option available on SMS API, parameter name and Parameter value which is not fixed Click on Update button 2. Update Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	Pa	rameter Name	( <sup>-</sup>		Parameter Value	
Text L Edit option available on SMS API, parameter name and Paramter value which is not fixed Click on Update button 2. Update Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	T	•			`mobile_no`	
1.         Edit option available on SMS API, parameter name and Parameter value which is not fixed         Click on Update button         2.         Update    Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not	T	ext	+ $$		`message`	
Edit option available on SMS API, parameter name and Paramter value which is not fixed Click on Update button 2. Update Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not					message	
Edit option available on SMS API, parameter name and Parameter value which is not fixed Click on Update button 2. Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not			<u> </u>			
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		Edit option av	ailable on SMS /	арі,		
Click on Update button 2. Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		parameter na	ne and Paramte	er		
Click on Update button 2. Update Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not		value which is	not fixed			
Click on Update button 2. Update Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not						
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not						
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not						
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not					Click on Update button	
Update Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not					Click on Update button	
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not					Click on Update button	
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not					2.	
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not					2. Update	
Step5: Now in the above dialog box editing option available on SMS API, parameter name and parameter value which is not					2. Update	
Steps. They in the above dating box earling option available on sixis ATT, parameter name and parameter value when is not					2. Update	
	Step	5. Now in the above	ie dialog boy ed	iting opti	on available on SMS API, parameter name and parameter val	ue which is not
fixed.	Step5	5: Now in the above	'e dialog box ed	iting opti	on available on SMS API, parameter name and parameter val	ue which is not



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.

SMART DIAL <sup>28</sup> % Your Alerts (0) Gerror Q Search
Configuration
CAMPAIRY MARAGEMENT CAmpaign aran 10 Value Route Hame*
CRM Configuration     mobit     Testing
Col Campaign Queue SMS API * SMS API
Mapping     Note : Parameter     SM3 Config Update Successfully     sumed as variable.
Campage Transfer Mapping     Parameter Name     Parameter Value
• Emsil Template
• SMS Template Text "message"
• File Category
Litt • User Mapping to DID
• Availe On Hold
e importante internet interne
• Assign Load
e Led Manager
o CRM Data
e Calobac Assign
Step8: Now press the ok button, which will result data changes have been successful
Steps: Now press the ox outlon, which will result dut changes have been successful.
3. Delete SMS Route
This mechanism anghlas delating a saved SMS Poute
This mechanism enables deleting a saved SMIS Rolle.
Steps to delete SMS Route are as follows :-
Step1: Go to system configuration Hit SMS Config sub menu
Star 2 No. 4. SMS C. G. Star Star Like
Step2: Now the SMS Config page appears as below
S SMART DIAL <sup>**</sup>
Open term         ADL RULES         Robits name         April         Paramity
C <sup>1</sup> USER MODE MASTER 2.
Image: MENU MAPPING     1.       Tick on checkbox to select it     Tick on checkbox to select it
- SMS CONFIG
EXAL CONFIG
LLORUST ELECTRICION DETAL
USER
CONE DULING MAP
LEAD SOURCE
SKILL MASTER
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.



٢	$\equiv$ SMART DIAL <sup>**</sup>					5	Your Alerts	0	🕽 demo 👻	Q Sea	arch	
*	CLIENT DIRECTORY								Ũ +			
												Pa
Q,		Testing	http://smsapi.com/	То	Text							
(**)												
	USER MODE MASTER		Deletes	elected SMS Co	onfiguration 2							
	MENU MAPPING		Builde		ingulation 1.							
	USER STATUS COLOUR											=
	USER MODE PERMISSION		l	ок	Cancel							
	SMS CONFIG											
	EMAIL CONFIG											
	BLACKLIST											

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.

SMART DIAL (Pues Action of the Charter (P) CLEAR FUES (P) CL	2: Now the Email Config page appears as follows:	SMART DIAL          Werk Marting       Work All ()       () <t< th=""><th>9</th><th></th><th>,</th><th></th><th></th><th></th><th>~</th><th></th><th></th></t<>	9		,				~		
CLEENT DIRECTORY ACL, RILES UND USER MODE MAATER WEAD WAATER WEAD	CLIENT DIRECTORY CLIENT DIREC	CLEAR DREECTORY CLEAR		SMART DIAL				🐐 Your Alerts 🛛 💿	🙆 demo 👻	Q Search	
Accurate B and the status of t	Act HULES To Company USER MODEC MARTER MENU MAPPing USER MODEC MARTER MENU MAPPing USER MODEC MARTER MENU MAPPing USER MODEC MARTER Company Click on Email config sub menu Click on	ACL RULES THO THO THO THO THO THO THO THO		CLIENT DIRECTORY	Mode Details	0 - 0%					
2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:	Droc Web MadFile Meter MadFile Me		ACL RULES	(0)	No Login					
USER MODE MASTER WebU MAPPING USER MODE PErMISSION USER MODE PE	Use Not whether the status of	very worder waterer worder waterer worder between the status of weak the status of waterer status of the status		DND	Agent Status	0 - 0%					
MERU MAPPING       Mode Details       Agent Status       B ide Status       B vrapup Status       C Tak Status         USER MALL CONFIG       0       0       00:00:00       00:00:00       00:00:00         SMS CONFIG       Extension Detail       0       0       00:00:00       00:00:00         SMS CONFIG       Extension Detail       C Ick on Email config sub menu       C Ick on Email config sub menu       C Ick on Email config sub menu         ZONE DIALING MAP       C Ick on Email config sub menu         2: Now the Email Config page appears as follows:       2: Now the Email Config page appears as follows:       C Ick on Email config page appears as follows:	<b>Metu UkAPPROL</b> <b>WEAU WAAPPROL</b> <b>USER NOTE DOLLOR</b> <b>O</b> <b>O</b> <b>O</b> <b>O</b> <b>O</b> <b>O</b> <b>O</b> <b>O</b> <b>O</b> <b>O</b>	Metu UkAppage Metu U		USER MODE MASTER	(0)	No Login					
2: Now the Email Config page appears as follows:	USER STATUS COLUMN SIME CONFIG EMAIL CONFIG EMAIL CONFIG EMAIL CONFIG EXTENSION DEFAIL USER Click on Email config sub menu Click on Email config sub menu 2: Now the Email Config page appears as follows:	D Click on Email config sub menu Click on Email config sub me		MENU MAPPING	Mode Details	Agent Status	Idle Status	Wrapup Status	Talk Status		
2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:	USER MODE PERMINUS ENAUL COMPRIS ELACKLUT USER USER DALING MARE DISPOSITION Click on Email config sub menu USER JALING MARE ON EDITION 2-2: Now the Email Config page appears as follows:		USER STATUS COLOUR	0	0	00:00:00	00:00:00	00:00:00		
2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:	Click on Email config sub menu USER ULAD SOURCE LEAD SOURCE 2: Now the Email Config page appears as follows:		USER MODE PERMISSION							
2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:		SMS CONFIG							
2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:		EMAIL CONFIG							
2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:		BLACKLIST							
2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:		EXTENSION DETAIL			1				
2: Now the Email Config page appears as follows:	20 RE DIALING MAP CHAT GROUPS LEAD SOURCE 2: Now the Email Config page appears as follows:	2014 DRAUNG MARP CHAT GROUPS LEAD SOURCE D2: Now the Email Config page appears as follows:		DISPOSITION	Click	on Email config sub menu					
2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:	22: Now the Email Config page appears as follows:		ZONE DIALING MAP							
2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:	12: Now the Email Config page appears as follows:		CHAT GROUPS							
2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:	2: Now the Email Config page appears as follows:		LEAD SOURCE							
				· Now the Email (	Config page	C 11					



0	≡ SMART DIAL <sup>**</sup>			🦩 Your Alerts 🛛 🕕	lemo	Q Search	
*	CLIENT DIRECTORY					+	
O\$	ACL RULES	e SMTP Host SMTP User SMTP Pas	NEW EMAIL CONFIG	IL2 Autrentication Camps		Action	
۲»	USER MODE MASTER			DEMO	-		
=	MENU MAPPING		SMTP HOST *	DEMO	_	Click on + icon to open new	
-	USER STATUS COLOUR		SMTP PORT			email coming dialog box	
-	USER MODE PERMISSION		SMTP USER * SMTP PASSWORD *				
<i>~</i>	EMAIL CONFIG		SAVE				
<u>lahi</u>	BLACKLIST						
	EXTENSION DETAIL						
	DISPOSITION						
	ZONE DIALING MAP						
	CHAT GROUPS						
	SKILL MASTER						
Step	4: When dialog bo 4: When dialog bo MTP HOST MTP HOST MTP HOST MTP PORT MTP PASSWORD SAVE Select from 5: After that fill up	DEMO Comparison STTICE	all Config dialog e campaign/servic	e alert from campaig	gn comb	oo box selection as	shown in picture
зюр	••••••••••••••••••••••••••••••••••••••		appropriate and c	1 51111 11050, 1 010,	00001 000		
NEV	V EMAIL CONFIG			×			
C/	AMPAIGN/ALERT *	DEMO		-			
S	MTP HOST *	smtp.gm	ail.com				
SI	MTP PORT	587 smart@g	mail.com				
s	MTP PASSWORD *	••••••	•••				
	SAVE RESET						
	$\mathbf{X}$						
	2.	Fill up the d	1. ialog box with				
Cli	ск on Save button	appropriate	data				
Step	6: As we click on	Save button, data save	ed and email Con	tig page shows to th	e user		







EDIT EMAIL CONFIG	X
SMTP HOST*	smtp.gmail.com
SMTP PASSWORD*	sinateegnateeon
SINTE PASSWORD	
C N E	
SAVE	RESET
3	Do the changes as required
Click on Save button	
Step 5 <sup>.</sup> Now in the above dialog bo	x 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
Stepo: Once done with renaming,	shek 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	1 are as follows :-
Step1: Go to system configuration	Hit Email Config sub many
Step1. Of to system configuration	, nit Email Conng sub menu
Step <sup>2</sup> : Now the Email Config page	appears are as below
stop - i to w the Linkin coming puge	
$\odot$ = SMART DIAL <sup>**</sup>	🐐 Your Alerts 💿 😡 demo 👻 🔍 Search
CLIENT DIRECTORY	+
ACL RULES 1 smtp.gmail.co	SATE User         SATE Possword         SATE Post         SSI         TLS         Authentication         Campaign         Alert         Action           n         smart@gmail.com         587          DEMO
USER MODE MASTER	
MENU MAPPING	Click on Delete icon
USER STATUS COLOUR	
SMS CONFIG	
EXTENSION DETAIL	
USER	
ZONE DIALING MAP	
CHAT GROUPS	
Step3: Click on Delete icon, a pop	up window will ask a confirmation message for delete.



٢	≡ SMART DIAL <sup>™</sup>							🕴 Your Al	lerts 🕕	🙆 demo 👻	Q Search	$\supset$
*	CLIENT DIRECTORY										+	
and a	ACL RULES	<u>#</u>	SMTP Host	SMTP User	SMTP Password	SMTP Port				Campaign		
	DND	Ľ	smtp.gmail.com	n smart@gmail.com		587				DEMO		
<b>C</b> ®	USER MODE MASTER				Are you sure w	ant to delete it!						
	MENU MAPPING						_					
	USER STATUS COLOUR				ок	Cancel						
	USER MODE PERMISSION											
9	SMS CONFIG											
	EMAIL CONFIG											
	BLACKLIST											
	EXTENSION DETAIL											
	USER											
	DISPOSITION											
	ZONE DIALING MAP											
	CHAT GROUPS											

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.

1							
0	≡ SMART DIAL <sup>**</sup>				🖩 Your Alerts 💿 🌔	🛞 demo 👻 🔍 Q Sea	rch
*	CLIENT DIRECTORY	Mode Details					
Ф₿ –	ACL RULES	Agent Status	0 - 0				
<b>C</b> 3)	DND	(0)	No Login				
<u> </u>	USER MODE MASTER	Mode Details	Agent Status	Idle Status	Wrapup	Talk Status	
筆					Status		
		0	0	00:00:00	00.00.00	00:00:00	
	SMS CONFIG						
<u>~</u>	EMAIL CONFIG						
Latel	BLACKLIST						
	EXTENSION DETAIL						
	USER	Click on Blackli	st sub menu				
	DISPOSITION						
	ZONE DIALING MAP						
a .							
Step2	: After clicking on	Blacklist sub	menu, the Blac	klist page wil	I appear as belo	ow:	



0	≡ SMART DIAL <sup>**</sup>	🐐 Your Alerts 🕕 🙆 demo 👻 📿 Search									
· · · ·	CLIENT DIRECTORY	Black List Url Add Black List Upload Black List Search Black List Show Black List									
08	ACL RULES	Black List URL Update Black List URL Check URL									
	DND	Parameters required →  • phone=salue - (To check phone exist in blacklist.) URL :- ?phone=1234567890&client_id=1111									
C.	USER MODE MASTER										
<b>主</b>	MENU MAPPING	Return 0 = Not in blacklist o 1 = Found in blacklist o 2 = Database conscion or query error. o 4 = Invalid parameter passed. • adphone=value - ( <i>Phone to add in blacklist</i> .) URL - <b>?addphone=1234567800&amp;client_id=1111</b> Return 0 = uncess = Winder added in blacklist. o error = Any error(database,query,etc).									
_	USER STATUS COLOUR										
	USER MODE PERMISSION										
<b>P</b>	SMS CONFIG										
	EMAIL CONFIG										
- Land	BLACKLIST										
	EXTENSION DETAIL										
	USER										
	DISPOSITION										
	ZONE DIALING MAP										
	CHAT GROUPS										

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

0	$\equiv$ SMART DIAL <sup>30</sup>	1/Your Alerts 💿 😡 demo 💌 Q Search	
*	CLIENT DIRECTORY	Black List Url Add Black List Upload Black List Search Black List Show Black List	
-02	ACL RULES		
	DND	http://192.168.16/smart/blackist/blackist.php Update Black List URL Check URL	
C.»	USER MODE MASTER	phone-value - (To check phone exist in blockist.) URL -: ?phone=1234567890&client_id=1111	
÷.	MENU MAPPING	Neturn > Not in blacklist 0 = Form in Shacklist	
	USER STATUS COLOUR	o 2 = Database connection or query error o 3 = Invitell phone number passed.	
	USER MODE PERMISSION	<ul> <li>a 4 invalid parameter passed.</li> <li>addphone-sulae - (Phone to add in blacklist.) URL - ?addphone=1234567890&amp;client_id=1111</li> </ul>	
	SMS CONFIG	o success = Number added in blacklist. o error = Any error(database), query etc).	
1	EMAIL CONFIG		
	BLACKLIST	1. Click on this button to Click on this button to check	
	EXTENSION DETAIL	Ener blacklist once set the blacklist URL URL is valid or not	
	USER		
	DISPOSITION		
	ZONE DIALING MAP		
	CHAT GROUPS		
Step4	<sup>1.</sup> Then click on "U	odate Black List URL? for set the Black List URL	
Stop			
Step:	5: Click on "Check	URL" button to check that URL is valid or not.	
1			
	1. Te	Add a single number in Blacklist, follow the steps given below:-	
Step	l: Go to Blacklist su	b menu, of system configuration.	
1			
Sten	. Then click on "Δ	dd Black List" tab, which is after the Black List URL tab	
Step	2. Then ener on A	au Diack Lise and, which is alter the Diack Lise OKL tab	



0	≡ SMART DIAL <sup>™</sup>	* Your Alerts 💿 🙆 demo 👻 Q Search
*	CLIENT DIRECTORY	Black List Url Add Black List Upload Black List Search Black List Show Black List
08	ACL RULES	Number/Numbers
-	DND	
ς.»	USER MODE MASTER	Add to Black List
=	MENU MAPPING	
	USER STATUS COLOUR	
	USER MODE PERMISSION	
	SMS CONFIG	1. Then click on Black List button
	EMAIL CONFIG	Enter the numbers here to add
	BLACKLIST	number in biacklist database
	EXTENSION DETAIL	
	USER	
	DISPOSITION	
	ZONE DIALING MAP	
	CHAT GROUPS	

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

0	$\equiv$ SMART DIAL <sup>**</sup>	🐐 Your Alerts 💿 🙆 demo 👻 Q Search
*	CLIENT DIRECTORY	Black List Url Add Black List Upload Black List Search Black List Show Black List
08	ACL RULES	9876543210
<b>e</b> 10	DND	
۳۵	USER MODE MASTER	Add to Black List 9876543210=OK,
÷	MENU MAPPING	
_	USER STATUS COLOUR	
-	USER MODE PERMISSION	
P	SMS CONFIG	
	EMAIL CONFIG	
111	BLACKLIST	

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

0	$\equiv$ SMART DIAL <sup>**</sup>	🐐 Your Alerts 💿 😡 demo 👻 🔍 Search
*	CLIENT DIRECTORY	Black List Url Add Black List Upload Black List Search Black List Show Black List
08	ACL RULES	Browse C:\fakepath\blacklist.cs Upload 0% • Only csv file. • First column heading(phone).
-	DND	File max size (20MB).     File rows size (1000)
C	USER MODE MASTER	
-	MENU MAPPING	
	USER STATUS COLOUR	1. Then click on Upload button
-	USER MODE PERMISSION	Click on Browse button to select the csv file
<u>_</u>	SMS CONFIG	
	EMAIL CONFIG	
<u>hiil</u>	BLACKLIST	
	EXTENSION DETAIL	
	USER	
	DISPOSITION	
	ZONE DIALING MAP	
	CHAT GROUPS	



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.

0	$\equiv$ SMART DIAL <sup>30</sup>	19 Your Alerts 💿 😡 demo 👻 Q Search							
*	CLIENT DIRECTORY	Black List Url Add Black List Upload Black List Search Black List Show Black List							
o:	ACL RULES	Prowse C/(akanath)Nacklist cs. Iloland. 100% • Only csv file.							
e 1)	DND	Importing done.     File rows size (1000)							
<b>C</b> **	USER MODE MASTER								
ŧ	MENU MAPPING								
	USER STATUS COLOUR								
. <b>-</b>	USER MODE PERMISSION								
P	SMS CONFIG								
1	EMAIL CONFIG								
<u>[10]</u>	BLACKLIST								
Step	3. To search a number in blacklist database: Step1: Go to Blacklist sub menu, of system configuration.								
Step2	Step2: Then click on "Search Black List" tab, which is after the `Upload Black List` tab								



	SIMART DIAL	
∞ ¢⊘ ≆	CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER STATUS COLOUR USER MODE PERMISSION	Die Unit       Add Die List       Search Die List         Search Number
	SMS CONFIG EMAIL CONFIG	2. for searching number in DND database
[_tt]	BLACKLIST EXTENSION DETAIL	
	DISPOSITION ZONE DIALING MAP	
	CHAT GROUPS LEAD SOURCE SKILL MASTER	

Step3: Enter/type a number in search textbox.

Step4: Click on Search Button.

	$\equiv$ SMART DIAL <sup>30</sup>	∱ Your Alerts 💿 😡 demo マ 📿 Search
<b>*</b>	CLIENT DIRECTORY	Black List Url Add Black List Upload Black List Search Black List Show Black List
a:	ACL RULES	7654321900 Search Delete Found in black list.
N)		
		2 Response shows here
2	USER STATUS COLOUR	1. Then click on Search button
2	USER MODE PERMISSION	
2	SMS CONFIG	
	EMAIL CONFIG	
1	BLACKLIST	

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



	$\equiv$ SMART DIAL <sup>**</sup>	🕴 Your Alerts 💿 😡 demo 👻 Q Search
*	CLIENT DIRECTORY	Black List Url Add Black List Upload Black List Search Black List Show Black List
OC	ACL RULES	7654321900 Search Delete
	DND	
C.%	USER MODE MASTER	
÷	MENU MAPPING	
	USER STATUS COLOUR	Enter me number nere Cick on Derete binton to derete me number from blacklist database
<u> </u>	USER MODE PERMISSION	
	SMS CONFIG	
	EMAIL CONFIG	
<u>-111</u>	BLACKLIST	

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

0	≡ SMART DIAL <sup>®®</sup>	† Your Alerts 💿 🛞 demo 👻 Q. Search
*	CLIENT DIRECTORY	Black List Url Add Black List Upload Black List Search Black List Show Black List
08	ACL RULES	Show List
(୬)	USER MODE MASTER	
æ	MENU MAPPING	Then click on Show List button to view the blacklist number
	USER STATUS COLOUR	
	USER MODE PERMISSION SMS CONFIG	
22	EMAIL CONFIG	
	BLACKLIST	
Step3	: First click on "Sho	w 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
Blac	ck List Url Add Black List	Upload Black List Show Black List Show Black List
s	how List 9876543210 x	9889675543 ×



## 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.

9	= SMART [	DIAL			÷	Your Alerts 🛛 💿	i demo 🔫	Q Sea	arch
	CLIENT DIRECTORY		Node Details	0 - 0% No Login					
<b>0</b> 8 <i>(</i> *)	ACL RULES		Agent Status	0 👻 0% No Login					
	MENU MAPPING	- 4	Mode Details	Agent Status	dle Status	Wrapup	Talk S	tatus	
	USER STATUS COLOUR		0	0	00:00:00	Status	00:00:	00	
	USER MODE PERMISSIO	IN				00:00:00			
P	SMS CONFIG								
	EMAIL CONFIG								
	EXTENSION DETAIL								
	USER								
	DISPOSITION		Clic	k on Extension Detail	l sub menu				
	ZONE DIALING MAP								
ton	2. Extension D	atail paga	view the	allattad autona	ion/SID to alion	+			
tep	2: Extension D	etail page	view the a	allotted extensi	ion/SIP to clien	t.			
tep <sub>Sear</sub>	2: Extension D	etail page	view the a	allotted extensi	ion/SIP to clien	t.		<b>B</b> Ø	
Step Sear	2: Extension D ch extension! ame Sip Type	etail page	view the a	allotted extension	ion/SIP to clien	t. s Se	t MAC	B ¢	Action
Step Sear # N 1 6	2: Extension D ch extension! ame Sip Type 2011 Web Agent	etail page Secret 60011	view the a dtmfmode rfc2833	allotted extension	ion/SIP to clien	t. s Se	HE MAC	۵ ACL	Action
Step Sear # N 1 61 2 61	2: Extension D ch extension! ame Sip Type 2011 Web Agent 2012 Smart Agent	etail page	view the a dtmfmode rfc2833 rfc2833	allotted extension	MAC Address 7C:7A:91:97	t. s Se :C0:75	∙t MAC	► ¢ ACL ₹	Action
Step Sear # N 1 60 2 60 3 60	2: Extension D ch extension1 ame Sip Type 2011 Web Agent 2012 Smart Agent 2013 Smart Agent	etail page Secret 60011 60012 60013	dtmfmode rfc2833 rfc2833 rfc2833	IP Address	MAC Address 7C:7A:91:97	t. s Se :C0:75	t MAC ♥	□ ) ( φ ACL ✓	Action
Step Sear # N 1 60 2 60 3 60 4 60	2: Extension D ch extension! ame Sip Type 0011 Web Agent 0012 Smart Agent 0013 Smart Agent 0014 Web Agent	etail page Secret 60011 60012 60013 60014	tric2833 rfc2833 rfc2833 rfc2833	allotted extension	MAC Address	t. s Se :C0:75	NE MAC	D ¢ ACL V V	Action

#### 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 exter	nsion!						<b>B</b> Ø	
# Name	Sip Туре	Secret	dtmfmode	IP Address	MAC Address	Set MAC	ACL Action	
1 60011	Web Agent	60011	rfc2833			-		<b>a</b>
<b>2</b> 60012	Smart Agent	60012	rfc2833		7C:7A:91:97:C0:75			<b>a</b>
<b>3</b> 60013	Smart Agent	60013	rfc2833	192.168.1.9		-		<b></b>
<b>4</b> 60014	Web Agent	60014	rfc2833					<b>a</b>
E (0045		(0045						
5 60015	web Agent	60015	1102833			-		
				Set the IP Addres by clicking on Ent	s for Smart Agent er button			
Step3: Se	t the IP Add	lress for	Smart Ager	nt by clicking on E	Enter button			
Step4: Aft	er clicking	on enter	button, pop	up message shows	s as "Updated su	ccessfully"		
~								
Step5: The	en click on (	Ok butto	on to save th	e changes.				
100								
639								
11 1		2. Se	t the MAC	Address for Sma	rt Agent			
MACAL	ross used fo	r the Cr	nort A cont 6	UD true o				
MAC Add	iress used ic	or the Sr	nart Agent 3	SIP type.				
When use	login throu	igh the	Smort Agent	then agent applie	ation check that	ID/MAC Addres	s allotted to the	t PC or not If not
then it's se	nt the requi	est (MA	C Address)	to server for the lo	ation check that	IF/MAC Addres	s anotied to tha	
then it 5 st	int the requ		C Huuress)	to server for the R	,giii.			
Step1: Co	nsider the st	ens of g	oing to Exte	ension sub menu a	s mentioned abo	ve		
Step1. co.	isider the st	ops of g	oing to Ext	usion suo menu u	5 mentioned upo			
Sten2. Wh	en Extensio	n nage	view to user	then select the M	AC Address from	n Set MAC com	ho hox	
500p2. W1		in page	view to user	then select the M			00 00X	
Or								
Step2: Ent	er the MAC	C Addres	ss in MAC A	Address textbox ar	d click on Enter	button		
····r								
Search ext	ension!							<b>B</b>
# Name	Sip Type	Sec	ret dtmfm	ode IP Address	MAC Ad	ldress	Set MAC	ACL Action
1 60011	Web Agent	600	11 rfc2833	3			-	
2 60012	Smart Agen	t 600	12 rfc2833	3	7C:7A:	91:97:C0:75		Image: A matrix and the second sec
<b>3</b> 60013	Smart Agen	t 600	13 rfc2833	3				
4 60014	Web Agent	600	14 rfc2923	2				
4 00014	Web Agent	000	14 1102050					
<b>5</b> 60015	Web Agent	600	15 rfc2833	3				
				/				
		Set	the MAC Add	dress by just enter the		Select the M	AC Address from	
		MA	C in textbox a	na click on enter butto	OR	'Set MAC" co	ombo box	



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.

9	Gearch ex	tension!						<b>b</b> ][¢	
#	Name	Sip Type	Secret	dtmfmode	IP Address	MAC Address	Set MAC	ACL	Action
1	60011	Web Agent	60011	rfc2833			•	V	/
2	60012	Smart Agent	60012	rfc2833		7C:7A:91:97:C0:75		V	/
3	60013	Smart Agent	60013	rfc2833			•	7	<ul> <li>i</li> </ul>
4	<b>6001</b> 4	Web Agent	60014	rfc2833			•		/
5	<b>60015</b>	Web Agent	60015	rfc2833			•		/

### 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.

	10 m m			
0	$\equiv$ SMART DIAL <sup>**</sup>		🖩 Your Alerts 💿 😡 demo 🔻	Q Search
<b>~</b>		Search extension!	Writing to asterisk!	<b>D</b>
		# Name Sip Type Edit Extension		ACL Action
¢6	ACEROLES	1 60011 Web Agent Name	60013	
		2 60012 Smart Agent Sip Type	SMART AGENT	
	USER MODE MASTER	Secret	60013	
	MENU MAPPING	3 60013 Smart Agent		
	USER STATUS COLOUR	4 60014 Web Agent	-	Edit 😰
	USER MODE PERMISSION	5 60015 Web Agent	ulaw	
P	SMS CONFIG	IP Address	192.168.1.9	
	EMAIL CONFIG	MAC Address		
<u></u>	BLACKLIST	e Save		/ 1
	EXTENSION DETAIL		× \	Click on edit icon
	USER	/ 3.	2.	
	DISPOSITION	Click on Save b	Now in the dialog box do the	
	ZONE DIALING MAP		chunges as required	
	CHAT GROUPS			
tep	3: Now in the dialog	box do the changes as requ Delete IP/MAC Address	ired then click on Save button a data through Delete Action	
Dele	ete icon used for dele	ting IP/MAC Address recor	d.	



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.

0	≡ SMART DIAL*						🕈 Your Alerts 🐽 🤇	🔊 demo 👻	Q Sear	ch
*	CLIENT DIRECTORY	Search ex	tension!							Φ
08	ACL RULES	// Name	Sip Type	Secret	dtmfmode efe2922	IP Address	MAC Address	Set MAC	AC	L Action
c»	DND	2 60012	Smart Agent	60012	rfc2833		70:74:91:97:00:75			
-	MENU MAPPING	3 60013	Smart Agent	60013	rfc2833					-/-
	USER STATUS COLOUR	4 60014	Web Agent	60014	rfc2833					
	USER MODE PERMISSION	5 60015	Web Agent	60015	rfc2833				-	
~	EMAIL CONFIG								/	
ш.	BLACKLIST							Clic	k on Dele	te icon
	EXTENSION DETAIL USER									
	DISPOSITION									
	ZONE DIALING MAP									
	CHAT GROUPS									

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

0	≡ SMART DIAL <sup>™</sup>				🖗 Your Alerts 💿	😡 demo 👻 🔍 Q Search		
*	CLIENT DIRECTORY		1 - 100 %					
-08	ACL RULES		1 - 100.%					
Co			READY					
	MENU MAPPING	A Mode Details	Agent Status	Idle Status	Wrapup Status	Talk Status		
	USER STATUS COLOUR	1	1	00.00.00		00.00.00		
	USER MODE PERMISSION			00.00.00	00:00:00	00.00.00		
-	SMS CONFIG							
1.1.1	EMAIL CONFIG							
1111	BLACKLIST	Clie	ck on User sub menu					
	EXTENSION DETAIL							
	• USER							
	DISPOSITION							
	ZONE DIALING MAP							
Step2	: Now click on '+' t	outton among	the couple of bu	uttons, to let a	dd user dialog	box appear		



9	≡ SMART DIAL <sup>*</sup>							Alerts _	😡 demo 👻	Q Searc		
<b>~</b>	CLIENT DIRECTORY								¢ 🗃 🔹	• + [	Ŧ	
~*	DND	##	User ID		Name	Extension Pin	Agent	Mobile	IMEI Number	Active	Action	î
	ACL RULES		0006 <u>admin</u>		demo		xxxx	xxxxxx	a300de3b45ffe6ec	× 🔍		
C.»	USER MODE MASTER			Create Ne	w User		×		1			
=	MENU MAPPING		0097 <u>kamal</u>	All form f	ields are req	uired.	^	XXXXXX	18c44c7804392a53	×		
	USER MODE PERMISSION			User ID*								
-	USER STATUS COLOUR						Click	on + icon for adding r	new user			
P	SMS CONFIG			Name								
	EMAIL CONFIG			Password*								
<u></u>	BLACKLIST			Password								
	EXTENSION DETAIL			Agent Mob	ile							
	• USER			Note	: If have mo	bile agent permission	• L					
	DISPOSITION						-					
	ZONE DIALING MAP					Save Can	cel					
	CHAT GROUPS							1				

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

Create New User			
All form fields are required. User ID* rahul Name Rahul Singh Password* ••••••• Agent Mobile Note: If have mobile agent permission. Save Cancel Step4: After clicking on save button, message st Step5: Now we can see the record added in the st	hows as "User Save Successfully"		
0130 <u>rahul</u> Rahul Singh		V	
2. To add bulk of users			
Step1: Click on Upload user 👎 icon, to let upl	oading dialog box appear.		
Step2: Once upload button is clicked, a mini dia	log box will appear as below		



Upload (CSV) file.		×
Upload CSV File Format	Field Format(user_id name password mobile_no)	
Browse No file selected.	0%	
		Upload Cancel
Step3: User is supposed to create a	esv file via excel sheet in same format mentioned	l in the dialog box :
A B 1 user_id name pas 2 rahul Rahul Singh rah 3 sohan Sohan soh	C D sword mobile_no ul1 an1	
Step4: Once the csv file have been of will enable another dialog box to se	reated, it is to be uploaded in via the dialog box, ect the csv file	to do it click on the "Browse" button, which
Upload (CSV) file.		× 1
Upload CSV File Format Browse user_upload.csv Click on Browse button to select the csy file	Field Format(user_id name password mobile_no) 0% "user_upload.csv" file selected	
	When csv file selected then click on Upload button	
		Upload Cancel
Step5: Once file selected then click	on upload button.	
Step6: After click on upload button,	a popup window will ask a confirmation messag	ge.



	Upload (CSV) file.	×
	Upload CSV File Form (user_id name password mobile_no)	
	Browse user_upt Are you sure want to Upload it ?	
	OK Cancel	
	Upload	
	Step8: Now click on "Ok" button, once ok button is clicked, those numbers will be uploaded showing a me	ssage in green text
	"File uploads done".	
	Upload (CSV) file.	×
	Upload CSV File Format Field Format(user_id name password mobile_no)	
- 4	Browse user_upload.csv File upload done.	
	rahul 2 0	1
	sohan	
	Upload Cancel	
	3. Edit User	
	Step1: Click on the pencil like <i>icon</i> to open editing dialog box.	
	Edit User	
	UserID*	
	User Name	
	Rahul Singh	
	Agent Mobile Note: If have mobile agent permission.	
	Edit option available on User Name, Extension Pin, Agent Mobile	
	Update	
L		



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



0	=	SMART DIAL <sup>™</sup>				÷	Your Alerts 🛛 😶	😡 demo 👻	(	Q Search	ı
*	USEF	R MODE MASTER						Ø 💼 😖	) [ •	] [ + ] [ =	•
	MEN	IU MAPPING	##	User ID	Name	Extension Pin	Agent Mobile	IMEI Number		Active	Action
-06	USER	R STATUS COLOUR						b71520b3c53177a5		_	
Con	USER	R MODE PERMISSION		0006 admin	demo		9350158582		×	<b>v</b>	-
	SMS	CONFIG	-								
÷2	EMA	IL CONFIG		0097 <u>kamal</u>	kamal		9811419546	18c44c7804392a53	×	~	<ul> <li>Image: A set of the set of the</li></ul>
	BLAC	CKLIST			Rahul Singh						
	EXTE	ENSION DETAIL		0130 <u>rahul</u>						<b>V</b>	
<b>~</b>	<ul> <li>USER</li> </ul>	R									/
1.14	DISP	POSITION								/	
	ZONI	E DIALING MAP						Click on "cha	nge	passwo	rd" icon
	CHAT	T GROUPS									
	LEAD	D SOURCE									
	SKIL	L MASTER									

Step2: Click on "change password" icon to open change password dialog box

Change Password	×
•••••	
1. /	Click on change button
Enter the password	
	2. Change

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) Change properties for Single User

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



0	≡ SMART DIAL <sup>**</sup>				🐐 Your Alerts 🛛 🕕	Ģ	🔊 demo 👻	Q Searc	h
*	CLIENT DIRECTORY					_	Ф <b>в</b> •	• +	Ŧ
00	DND	## User ID	Name	Extension P	Change properties	×	lumber	Active	Action
	ACL RULES	0006 admin	demo		<ul> <li>Auto Answer</li> <li>Dial</li> </ul>		le3b45ffe6ec	×	
ຶ	USER MODE MASTER				Internal Transfer     External Transfer     Internal Conference				
-	MENU MAPPING	🔲 0097 <u>kamal</u>	kamal		External Conference		lc7804392a53	×	
	USER MODE PERMISSION				Call Hold				
-	USER STATUS COLOUR	0129 <u>rahul</u>	Rahul		Call Coach			V	
P	SMS CONFIG				Sms Chat Admin				
	EMAIL CONFIG	1.			Chat User Mo Panel Lead Email		_		
ш	BLACKLIST	Click on User ID to open	the properties	for user			2. Tick	2 Tick on checkbox to provide	
	EXTENSION DETAIL				Call Log		the e	xtra permis	sion to user
	• USER		2		Auto In Manual Mobile Agent				
	DISPOSITION	Untick on check	box to remove	1	Callback Auto				
	ZONE DIALING MAP	the permission	from user	user	<ul> <li>Listen</li> <li>Call Forward</li> </ul>				
	CHAT GROUPS				L				

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) Change Properties for bulk User

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

	≡ SMART DIAL <sup>®®</sup>				4	Your Alerts 🕕	🧑 demo 🔻	(	Q Search	ו	D
*	USER MODE MASTER						Ø 💼 🦻	) [ 0		Ŧ	
	MENU MAPPING	##	User ID	Name	Extension Pin	Agent Mobile	IMEI Number		Active	Action	ŕ
0,	USER STATUS COLOUR										
(*)	USER MODE PERMISSION		0006 <u>admin</u>	demo		XXXXXXXXXXX	b71520b3c53177a5	×	V		
<u> </u>	SMS CONFIG										
ŧ	EMAIL CONFIG		0097 <u>kamal</u>	kamal		*****	18c44c7804392a53	×	V	<ul> <li>Image: A start of the start of</li></ul>	
	BLACKLIST										
-	EXTENSION DETAIL		0130 <u>rahul</u>	Rahul Singh		2.	/		V		
P	• USER		1.	(	Click on this icon	to open "Chang	ge Properties" dialo	og bo	x		=
1.64	DISPOSITION	[	Tick the checkboxes to								
<u> </u>	ZONE DIALING MAP		select the multiple users								
	CHAT GROUPS										
Step2	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:



Change properties	
Auto Answer Dial Internal Transfer External Transfer Internal Conference External Conference Hangup Mute	
	If you want to remove the permission from all the selected user then first tick the checkbox and then untick it
Call Hold Barge	
Call Info	
Chat Admin Chat User	
<ul> <li>Mo Panel</li> <li>Lead</li> </ul>	
Email Number Mask	
User Log	
<ul> <li>Mobile Agent</li> <li>Callback Auto</li> <li>Download</li> </ul>	permission to all the selected
<ul> <li>Listen</li> <li>Call Forward</li> </ul>	

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

	MENU MAPPING	##							
	USER STATUS COLOUR		0006 admin	dama	*****	b71520b2a52177a5			
	USER MODE PERMISSION		0006 <u>admin</u>	demo	*******	D71520D3C53177a5	×	V	<ul> <li>Image: A set of the set of the</li></ul>
-	SMS CONFIG		0097 kamal	kamal	****	18c44c7804397a53			
	EMAIL CONFIG					1001101004572055		1000	×
	BLACKLIST	121	0120 rabul	Pabul Singh					
-	EXTENSION DETAIL		0150 <u>ranuc</u>	Kanut Singn				•	
	• USER								
	DISPOSITION								
	ZONE DIALING MAP					Click on this is CRM Mapping	on to " dia	o open "A log box	Agent
	CHAT GROUPS							-	
	LEAD SOURCE								
	SKILL MASTER								



ote: Mouse over on CRM Field Parent will be disp	blay
<ul> <li>Sitinetwork</li> <li>Sitincable</li> <li>DEMO</li> <li>Click on radio button to ope the crm fields for selected campaign in CRM box</li> </ul>	CRM fields shows here after the campaign selection

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

Agent CRM Map	oping:admin		×			
Note: Mouse over on C	CRM Field Parent will be display					
Campaign SITINETWO SITICABLE DEMO	RK	RM Name Address Gender Last Payment Plan Storename Location State DOB				
	Tick on checkbox t fields for selected	o select the crm campaign	]			
Step4: When user	login through the ager	nt application then r	napped crm fields s	- shows in (	CRM tab.	
3. Active/Inactiv	7e User					
`his mechanism i	s used to Inactive/Acti	ve user for login in	smart agent.			
Step1: Go to syste	em configuration menu	ı, Click User sub me	enu to enable appea	rance of u	user page	







## 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

			5	Your Alerts 🕕	🔊 demo 👻 📿 Search	
CLIENT DIRECTORY	Mode Details	1 🔺 100 %				
ACL RULES	Agent Status	1 🔺 100 %				
USER MODE MASTER	(1)	READY	0		-	
	Mode Details	Agent Status	de Status	Status	Talk Status	
USER MODE PERMISSION	1	1	18:58:00	00:00:00	00:00:00	
SMS CONFIG						
BLACKLIST						
EXTENSION DETAIL	C	lick on Disposition s	sub menu			
DISPOSITION						
ZONE DIALING MAP						
p2: Disposition Page	shows to user wi	ith Disposition	n details which	already create	ed in the system	
A						
) = SMART DIAL*			5	Your Alerts 💿 🤇	g demo - Q Search	
CLIENT DIRECTORY	# Name	Unique C	ade for FXS Disposition	Pescription	( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( )	
ACL RULES	Busy CALLBACK	onque c	-			
USER MODE MASTER	Hangup		-		· · · ·	
MENU MAPPING USER STATUS COLOUR	Sale		-		× *	
USER MODE PERMISSION				Click on new disp	+ icon to create osition	
SMS CONFIG EMAIL CONFIG					,	
BLACKLIST						
USER		Disposit	ion Home Page			
DISPOSITION						
CHAT GROUPS						
o3: Click on + icon to	add new dispos	sition				
94: After clicking on -	+ icon, "Create 1	New Dispositi	ion" dialog boy	k open		
reate New Disposition		×				
All form fields are required.						
Name*						
Description						
	Save	Cancel				



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

Create	New Disposition		
All for	m fields are required.		
Name*			
Inter	ested	-	
Descri	ption		1. Enter the name
custo	mer interested	- 10	
		~	Enter description
1	Click on Save button	1	for the disposition,
	to save the data	3.	normandatory
		-	Save Cancel

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

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

0	≡ SMART DIAL <sup>**</sup>		Your Alerts 😐 🙆 dem	no - Q Search	
*			<b>\$</b>	• +	
	ACL RULES	# Name Unique Code for FXS Disposition	Description		<b>^</b>
	DND	CALLBACK		× ×	
C.»	USER MODE MASTER	Hangup -		<u>•</u>	
-	MENU MAPPING	Interested	customer Interested	7	
	USER STATUS COLOUR	Sate		/ -	
	USER MODE PERMISSION				
	SMS CONFIG	Created disposition shows here		2.	
Lot			Click on "Sub Dis	this icon to open	
	EXTENSION DETAIL				
	USER				
	ZONE DIALING MAP				
	CHAT GROUPS				
Sec. 1		the state of the s			
Stepa	3: When data saved	then created disposition shows on the dispo	sition page		
Step	9: Then click on this	Let icon to open sub disposition dialog box			
Step!	9: Then click on this $\equiv$ SMART DIAL**	icon to open sub disposition dialog box	Your Alerts 👩 👩 dem	o * Q Search	
Step9	9: Then click on this	icon to open sub disposition dialog box	Your Alerts 😗 🙆 dem	o • Q Search	
Step9	SMART DIAL	icon to open sub disposition dialog box Image: A state of the state of th	Your Alerts 💿 🕢 dem	o + Q Search	1
Step9	SMART DIAL**	icon to open sub disposition dialog box           Image: state of the state	Your Alerts 💿 😡 dem Description	o * Q Search	-
Step © * c°	SMART DIAL**	icon to open sub disposition dialog box      box      CALBACK	Your Alerts 🕢 😡 dem Description	o → Q Search	-
Steps	SMART DIAL** CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENN MAPPING	icon to open sub disposition dialog box      Control open sub disposition dialog box      Control open sub disposition      Control open	Vour Alerts 💿 💿 dem Description	o ≠ Q Search	F
Step © « c° =	SMART DIAL**	icon to open sub disposition dialog box      box      box      childACK      childACK      childACK      box      box      box      childACK      control      box      childACK      control      box      childACK      control      box      control      contro      control      control      control      control      contro	Vour Alerts () () dem Description customer Interested	o • Q Search	-
Step9	CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER STATUS COLOUR USER MODE PERMISSION	icon to open sub disposition dialog box      there there there is the imposition      CALEACK      Hangue      Hangue      Sale      Sale      Contract of the imposition      Contract of the imposition      Sale      Contract of the imposition      Contract	Your Alerts () () dom () Description	o  Q Search  X  X  X  X  X  X  X  X  X  X  X  X  X	-
Steps © * * * * *	CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER STATUS CLOUR USER MODE PERMISSION SMS CONFIG	icon to open sub disposition dialog box      Unique Code for PCs Disposition      outlack      Hangup      Notestad      to answer      sale      1.	Your Alerts () () dem () Description	o  Q Search	
Step!	CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENN MAPPING USER STATUS COLOUR USER STATUS COLOUR USER MODE PERMISSION SMS CONFIG EMAIL CONFIG	icon to open sub disposition dialog box          Icon to open sub disposition dialog box         Icon to open sub disposition dialog box         Icon to open sub disposition dialog box         Icon to open sub disposition dialog box         Icon to open sub disposition dialog box         Icon to open sub disposition dialog box         Icon to open sub disposition dialog box         Icon to open sub disposition dialog box         Icon to open sub disposition dialog box         Icon to open sub disposition dialog box         Icon to open sub disposition dialog box         Icon to open sub disposition shows here	Vour Alerta  Cuick on t	A Search	7
Step9	CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER STATUS COLOUR USER STATUS COLOUR	icon to open sub disposition dialog box	Vour Alerts  Customer Interested	o Q Search x x x x x x x x x	-
Steps	CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER STATUS COLOUR USER MODE PERMISSION SMS CONFIG EMACLUST EXTENSION DETAIL	icon to open sub disposition dialog box      bury      Cutlance      bury      cutlance      bury      cutlance      bury      cutlance      theregoe      therefore	Vour Alerts () () dem	o Q Search x x x x x x x x x	F
Steps	CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER STATUS COLOUR USER MODE PERMISSION SMS CONFIG BLACKLIST EXTENSION DETAIL USER	icon to open sub disposition dialog box          Image: Disposition dialog box	Vour Alerts	o      Q Search      X	•
Steps	CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER MODE PERMISSION EMAIL CONFIG ELACALIST EXTENSION DETAIL USER DISPOSITION TYDE PERMISSION EXTENSION DETAIL USER DISPOSITION TYDE PERMISSION	icon to open sub disposition dialog box	Vour Alerts  Customer Interested Click on t "Sub Disp	o  Q Search  I I I I I I I I I I I I I I I I I I	
Steps	CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENN MAPPING USER STATUS COLOUR USER STATUS COLOUR USER STATUS COLOUR USER STATUS COLOUR USER MODE PERMISSION BILACKLIST EXTENSION DETAIL USER DISPOSITION ZONE DIALING MAP CHAT GROUPS	icon to open sub disposition dialog box	Vour Alerts	e	
Step!	CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER STATUS COLOUR USER STATUS COLOUR USER DISPOSITION ZONE DIALING MAP CHAT GROUPS	icon to open sub disposition dialog box	Vour Alerts	o Q Search	
Step9	E SMART DIAL <sup>**</sup> CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENN MAPPING USER STATUS COLOUR USER STATUS COLOUR STATUS COLOUR ST	icon to open sub disposition dialog box	Vour Alerta  Customer Interested	o	
Step!	CET SMART DIAL** CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER STATUS COLOUR USER MODE PERMISSION SMS CONFIG ELACLIST EXTENSION DETAIL USER DISPOSITION ZONE DIALING MAP CHAT GROUPS	icon to open sub disposition dialog box	Vour Alerts	o	
Step9	P: Then click on this SMART DIAL** CLIENT DIRECTORY ACL RULES DND USER MODE MASTER MENU MAPPING USER MODE MASTER MENU MAPPING USER STATUS COLOUR USER CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION ZONE DIALING MAP CHAT GROUPS 10: "Sub disposition	icon to open sub disposition dialog box	Vour Alerts	o  Q Search T T T T T T T T T T T T T T T T T T	



Sub Disposition		×
Disposition Name*	Interested	
Sub Dispositions List*		x
Sub Disposition Name		
		Add Sub Disposition

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

Sub Disposition		×			
Disposition Name*	Interested				
Sub Dispositions List*		X			
Sub Disposition Name 1. Enter the sub dispos name here	High	Then click on Add Sub Disposition button 2. Add Sub Disposition			
Step12: After that cl	ick on Add Sub Dispositio	o <mark>n butto</mark> n to save it			
Step13: As we click	on that button created sub	disposition name	shows in `Sub D <mark>is</mark>	<mark>posi</mark> tion List` comb	o box
	2. Delete Sub Di	sposition			
Step1: Consider the	steps as above for sub dis	position creation			
Step2: Then select th	e sub disposition from "S	bub Disposition Lis	t" combo box		
Step3: At last click of	on `x` icon to delete the se	lected disposition			



Sub Disposition
Disposition Name* Interested
Sub Dispositions List*
Sub Dispectition Name High
Select the sub disposition 1. Click on X icon to delete the selected sub disposition
Combo box Add Sub Disposition
3. Delete Disposition
Step1: Go to system configuration menu, Click Disposition sub menu to enable appearance of disposition page
SMART DIAL <sup>38</sup> % Your Alerts ● @ demo * Q Search
CLIENT DIRECTORY     Mode Details     1 a 100 %       Add Rules     Add Rules     Auto
C <sup>0</sup> DND     Agent status     1 ~ 100 %       USER MODE MASTER     (1)     READY
Image: Menu MAPPING     Mode Details     Agent Status     Mode Details     Mode Details
USER MODE PERMISSION SMS CONFIG
EMAIL CONFIG AIL BLACKLIST
EXTENSION DETAIL Click on Disposition sub menu
DISPOSITION
ZUNE DIALING MAP
Step 2: Dieposition Page shows to user with Disposition details which already created in the system
Step2. Disposition rage shows to user with Disposition details which aready created in the system
USER STATUS COLOUR
Sins control     #     Name     Unique Code for FXS Disposition     Description       CCE     EMAIL CONFIG     Image: Busy     Image: Code for FXS Disposition     Description
BLACKLIST     CALIBACK       EXTENSION DETAIL     Hangup
USER     Interested     Image: Customer Interested       INO Answer     Image: Customer Interested
ZONE DIALING MAP
CHAT GROUPS Tick on checkbox to select the disposition Click on "Delete" icon
SKILL MASTER
ACTIVITY
DATASET DATASET CONFIG
MAP MOBILE DEVICE
Step3: Now choose to tick a checkbox near the disposition.
L
Step4: After clicking the delete icon, a popup message asking a confirmation for delete



	≡ SMART DIAL <sup>**</sup>	1/2 Your Alerts 💿 🔕 demo 👻 🔍 Search
	SMS CONFIG	A Name Unique Code for FXS Disposition Description
-06 <sup>0</sup>	EMAIL CONFIG	- Dary -
<b>C</b> **	EXTENSION DETAIL	CALIBACK Selected disposition 7.
	USER	Interacted         customer Interacted           No Answer         *
	DISPOSITION	Sale OK Cancel
	ZONE DIALING MAP	
	LEAD SOURCE	
Land	SKILL MASTER	
	DEFAULT AUTO LOGIN	
	DATASET	
	DATASET CONFIG	
	MAP MOBILE DEVICE	
Step5	5: Now click on the	"Ok" button, which will result removal of that data.
-		
		4. Unique Code for the FXS Disposition
This	machaniam is used	for EVC econt
Inis	mechanism is used	for FAS agent.
Unia	ue code of digits us	ed to give the feedback of call.
Step 1	1: Go to system con	figuration menu, Click Disposition sub menu to enable appearance of disposition page
	and a second	
	≡ SMART DIAL <sup>**</sup>	9 Your Alerts 🐽 🛞 demo - Q. Search
*	CLIENT DIRECTORY	Mode Details 1 A Top 55
og	ACL RULES	
<b>c</b> ∞		(1) READY
-	MENU MAPPING	Ande Details +D Agent Status 20 idle Status 20 Waspup I Talk Status
	USER STATUS COLOUR	1 1 18:58:00 00:00:00
	SMS CONFIG	
Land	EMAIL CONFIG	
	EXTENSION DETAIL	Click on Disposition sub menu
	USER	
Step2	2: Disposition Page	shows to user with Disposition details which already created in the system
	-	
0		1/ Your Alerts 💿 😡 demo 💌 📿 Search
-	CLIENT DIRECTORY	
08	ACL RULES	#         Name         Unique Code for FXS Disposition         Description           Busy         Image: Code for FXS Disposition         I
<b>C</b> -3)		CALEACK
-	MENU MAPPING	interested customer Interested
	USER STATUS COLOUR	Sale Contraction C
	SMS CONFIG	
Land	EMAIL CONFIG	5 6 7
	EXTENSION DETAIL	8 9 If FXS based agent, then select the digit from
	USER	combo box for give the feedback of call
	ZONE DIALING MAP	
	CHAT GROUPS	
Step?	3: Select the digit from	om "Unique Code for FXS Disposition" column against the disposition as shown in above picture.
- P		· · · · · · · · · · · · · · · · · · ·



### 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:

0	≡ SMART DIAL <sup>™</sup>	🕴 Your Alerts 💿 🙆 demo 🛩 Q Search
*	SMS CONFIG	Country
02	EMAIL CONFIG	Zone Utating Start Time End Time Time Zone Number Identification Action Action
	BLACKLIST	Mode And
	EXTENSION DETAIL	2. Then click on this icon to display the
	USER	Select the country from combo box
	DISPOSITION	
	ZONE DIALING MAP	
	CHAT GROUPS	
	LEAD SOURCE	
	SKILL MASTER	
	DEFAULT AUTO LOGIN	
	ACTIVITY	
	DATASET	
	DATASET CONFIG	
	MAP MOBILE DEVICE	
N. 3		
Step.	3: Select the countr	y from country combo box, and then click on this is icon to display the data for selected country.
	and the second se	
$\odot$	SMART DIAL	% Your Alerts     ?
~	USER STATUS COLOUR	Country USA
	SMS CONFIG	Area Code
- <b>1</b>		Zone Name Kode (182) Start Time End Time Time Zone Number Identification Action Active/De-active
	EXTENSION DETAIL	
	USER	Click on "TimeZone Based" button to add
	DISPOSITION	
	ZONE DIALING MAP	
[]	CHAT GROUPS	
	LEAD SOURCE	If data available for the selected country then shows here
	SKILL MASTER	
	DEFAULT AUTO LOGIN	
	ACTIVITY	
	DATASET CONFIC	
	MAR MOBILE DEVICE	
	WILL MODILE DEVICE	
Step4 confi	4: If data available guration set for (X	for the selected country then data shows on Zone dialing map page otherwise message shows as "No XX)
Step	5: After click on "T	imeZone Based" button, Create New Zone dialog box appears as follows:



Time Zone		
[+00:00] - Defau	ilt	-
Zone Name		
Start Time		
10:32		
End Time		
10:32		
10:52		

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

Cancel

Create New Zone in(USA) for lead		
All form fields are required.		
Time Zone [-03:00] - America/Bahia		
Zone Name	1. Select the Time Zone	
Bahia	Enter the Zene Name	
Start Time	2. Enter the zone Name	
10:32		
End Time	Select the Start Time	
	3. Lind Lind Hills	
	4. Click on Save button	
Save Cancel		
and the second		
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	g map page then click on Edit label as shown in picture	

0						7 You	ır Alerts (	🖸 🛞 demo 👻	Q Sear	ch
	SMS CONFIG	Country	USA		-	-			+ TimeZo + Area Co	ode
o:	EMAIL CONFIG									Active/De-active
<b>e</b> -3)	BLACKLIST	Bahia	TimeZone Based	06:17 AM	17:35 PM	America/Bahia	[-03:00]		Edit   State	
	EXTENSION DETAIL	Panama	Area Code	03:45 AM	12:30 PM	America/Panama	[-05:00]	XXX******	Edit   State	
<b>a</b>	USER									
	DISPOSITION							Click on edit label to	i i	
-	<ul> <li>ZONE DIALING MAP</li> </ul>							open the edit diaog box		
P	CHAT GROUPS									
	LEAD SOURCE									
<u> </u>	SKILL MASTER									
	DEFAULT AUTO LOGIN									
	ACTIVITY									
	DATASET									
	DATASET CONFIG									
ton	· Edit Zone dialing	hoy appear	s as follow	10.						
lep2	. Duit Zone diamig	oox appear	s as 10110 v	/5.						



Edit/Delete Lead Zone	×	
All form fields are required.		
Time Zone		
[-03:00] - America/Bahia	-	
Zone Name		Select the Time Zone
Bahia		
Start Time		
09:17		
		Cale at the Chart and End time
End Time		Select the Start and End time
20:35		
Click on Save button to		
update the changes		
Delete Save C	ancel	

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

0		$\equiv$ SMART DIAL <sup>**</sup>						ır Alerts 🤇	🖸 🛞 demo 🔫	Q Sear	ch
*		USER MODE PERMISSION SMS CONFIG	Country	USA		•	•			+ TimeZo + Area Co	one Based
		EMAIL CONFIG									
		BLACKLIST	Bahia	TimeZone Based	06:17 AM	17:35 PM	America/Bahia	[-03:00]		Edit   State	
		EXTENSION DETAIL	Panama	Area Code	03:45 AM	12:30 PM	America/Panama	[-05:00]	XXX	Edit   State	
		USER									
		DISPOSITION							Click on edit label to	1	
-	•	ZONE DIALING MAP							open the edit diaog box		
<b>~</b>		CHAT GROUPS									
		LEAD SOURCE									
		SKILL MASTER									
		DEFAULT AUTO LOGIN									
		ACTIVITY									
		DATASET									
		DATASET CONFIG									

Step2: Edit Zone dialing box appears as follows:

All	form fields are required.
Tin	ne Zone
[-0	03:00] - America/Bahia 👻
Zoi	ne Name
Ba	ahia
Sta	art Time
09	9:17
End	d Time
20	):35
	Click on Delete button
	Click on Delete Dutton
	Delete Save Cancel



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





Create New State in (Bahia)   [-03:00] - America/Bahia   Start Time   10:32   End Time   20:32   State Char Code   CA   California     Image: Code State Name   State Name   California     Image: Code State Name   State Intro End Time     A California     Image: Code State Name     Image: Code Stat
I-03:00] - America/Bahia   Start Time   10:32   End Time   20:32   State Char Code   CA   State Name   California     Image: Code State Name Start Time End Time Action   Image: Code State Name Start Time End Time Action   Image: Code State Name Start Time End Time Action   Image: Code State Name Start Time End Time Action   Image: Code State Name Start Time End Time Action
Start Time   10:32   End Time   20:32   State Char Code   CA   State Name   Catifornia     Image: Code State Name Start Time End Time Action   Image: CA   California   Image: CA   California   Image: CA   California   Image: CA     California     Image: CA     California     Image: CA     CA     California     Image: CA     California     Image: CA     California     Image: CA     California     Image: CA
End Time 20:32 State Char Code CA State Name California Code State Name Start Time End Time Action CA California 07:32 AM 17:32 PM @ 1
I 20.32 State Char Code CA State Name Catifornia ✓ Code State Name Start Time End Time Action ✓ CA California 07:32 AM 17:32 PM @   x
State Char Code         CA         State Name         California         ✓       Code         State Name       Start Time         End Time       Action         ✓       CA         California       07:32 AM         17:32 PM       @   X
CA State Name California Code State Name Start Time End Time Action CA California 07:32 AM 17:32 PM @   ⊻
State Name         California         Image: Code State Name       Start Time       End Time       Action         Image: CA       California       07:32 AM       17:32 PM       @   ⊻
☑ Code State Name       Start Time       End Time       Action         ☑ CA       California       07:32 AM       17:32 PM       @   ⊻
CA California 07:32 AM 17:32 PM @   x
Save Cancel
Edit State (Time Zone Based)
<u>Euri State (Timezone Baseu)</u>
Step1: Consider the steps as above for opening dialog box of Add State
Step2: When State name shows as below in picture
Create New State in ( Babia )
[-03:00] - America/Bahia
Start Time
09:17
End Time
20:35
State Char Code
State Name
Image: Code State Name     Start Time     End Time     Action       Image: CA     California     07:32 AM     17:32 PM     @   X
Click on this icon to edit State
Save Cancel
Step3: Then we click on edit <sup>@</sup> icon, a popup dialog box open for confirmation message




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

Edit State ( CA		×
[-03:00] - Am	erica/Bahia	
Start Time		_
10:32		
End Time		
20:32		
State Char Co	da	
CA	96	
California		
cutionin		
	Click on Undete butten to eque the date	
	Click on Opdate button to save the data	
	Undate Cancel	
Step5: Edition	option available on Start time, End time and Sta	ate Name
<b>0 ( 11</b>		
Step6: When e	dition done then click on Update button	
	·	
Delete State	e (TimeZone Based)	
	<u> </u>	
Step1: Consid	er the steps as above for opening dialog box of A	Add State
r · · · · ·		
Step2. When S	State name shows as below in picture	



Create New State in ( Bahia )
[-03:00] - America/Bahia
Start Time
10:32
End Time
20:32
State Char Code
3
State Name
Cautornia
Code State Name Start Time End Time Action
CA California 07:32 AM 17:32 PM @ X
Click on this icon to delete
Save Cancel
Step3: After clicking the delete 🕺 icon, a popup message asking a confirmation for delete
USER MODE PERMISSION Create New State In (Bahla)
SMS CONFIG Concentration Conce
EMAIL COMPTO         10.32         Time Zone         Mandae Line Line Line Line Line Line Line Lin
C <sup>2</sup> EXTENSION DETAIL State Conference Delate state ?
CONCOLUNG MAP
CHAT GROUPS Did Cas Castronia 07:32 PM 201a
DEFAULT AUTO LOGIN
ACTIVITY
DATASET Save Caneel
Cherry M. 11.1 and SOL21 Area Link III and Areas of Cales Area
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

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







Create New Zone in(USA)
Create New Zone in(USA)
Create New Zone in(USA)
Create New Zone in(USA)
All form fields are required.
Time Zone
[-05:00] - America/Panama Select the Time Zone
Zone Name
Enter the Zone Name
Start Time
End Time Select the Start Time and End Time
1/:40
Dialing Number Identification
Note:     Enter the Dialing Number Pattern       XXX     (=Zone searching state code)
(=None searching state code) check for starting 3 digit
Save Cancel
Stan 7: As we click on Save button, data saved and Zone Name shows on Zone Dialing man page

0		۳ DIAL					🐐 Your	Alerts	💿 🛞 demo 👻	Q Sear	ch
*	SMS CONFIG	SION	Country	USA		•	•			+ TimeZo + Area C	one Based ode
08	EMAIL CONFIG										Active/De-active
em	BLACKLIST		Bahia	TimeZone Based	06:17 AM	17:35 PM	America/Bahia	[-03:00]		Edit   State	
· .	EXTENSION DETAIL		Panama	Area Code	03:45 AM	12:30 PM	America/Panama	[-05:00]	XXX******	Edit   State	
	USER							Cui (As	rent Time Details a/Calcutta)		
	DISPOSITION						/	Cu	rent Time: 13:30 PM		
-	<ul> <li>ZONE DIALING MAP</li> </ul>							Enc	Time: 17:30 PM		
<b>2</b>	CHAT GROUPS					When we r	nouse over this ther	1			
	LEAD SOURCE					it shows the or not	e dialing is in range	as f	ollows		
	SKILL MASTER										
	DEFAULT AUTO LOGIN	N									
	ACTIVITY										
	DATASET										
	DATASET CONFIG										
	MAP MOBILE DEVICE										
dd	New State	for th	ne Zone (A	Area Coc	<u>le)</u>						
Step1	: When zone	name	shows on z	one dialing	g map j	page th	en click on	Stat	e label as shown	n in pict	ture



<u>@</u>	SMART DIAL	.o				۶ You	ur Alerts 🛛 🧃	🗅 🙆 demo 🛩	Q Sear	ch
*	USER MODE PERMISSION SMS CONFIG	Country	USA			•			+ TimeZo + Area Co	one Based ode
<b>10</b> 8	EMAIL CONFIG	Zone Name								
e 10	BLACKLIST	Bahia	TimeZone Based	06:17 AM	17:35 PM	America/Bahia	[-03:00]		Edit   State	[111]
· ·	EXTENSION DETAIL	Panama	Area Code	03145 AM	12130 PM	America / Panama	[-05:00]	XXXxxxxxx	Edit   State	(C)
	USER									
	DISPOSITION							/		
-	ZONE DIALING MAP							Click on State label	to open the	
	CHAT GROUPS							dialog box for create	e new state	
	LEAD SOURCE									
	SKILL MASTER									
	DEFAULT AUTO LOGIN									
	ACTIVITY									
	DATASET									
	DATASET CONFIG									
	MAP MOBILE DEVICE									

Step2: Create New State dialog appears as follows:

× Start Tin 08:45 End Tim 17:30 State N 507 ric Code Cole Code State Name Start Time End Time Action Select the Start and End time Enter the state numeric code in digits Enter the State Name Click on Save button 4. Save Cancel

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:

	te New S	itate in ( Panama	)		3
[-05	:00] - An	ierica/Panama			
Star	t Time				
08:4	45				
End	Time				
17:3	30				
C to to	. Numeral	e Cede			
507	, traineri	0.0000			
State	e Name				
Cou	on				
5	Code	State Name	Start Time	End Time	Action
5	507	Colon	03:45 AM	12:30 PM	@   ×

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



	t Time				
08:4	45				
End	Time				
17:3	30				
State	e Numeri	c Code			
507					
State	e Name				
Col	on				
9	Code	State Name	Start Time	End Time	Action
	507	Colon	03:45 AM	12:30 PM	@ I ≚
5				/	
>					
<b>S</b>					
			Click on this ic	con to edit S	tate

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







Step3: After clicking the delete <sup>¥</sup> icon, a popup message asking a confirmation for delete

	$\equiv$ SMART DIAL <sup>*</sup>				rts 💿 🛛 🛞 demo 🖛		
-	USER MODE PERMISSION	Country	Create New State in ( Panama )	×	CALCOLOGICA (CALCOLOGICA)	+ TimeZone Based	
	SMS CONFIG		[-05:00] - America/Panama				
-06	EMAIL CONFIG		08:45				
C*)	BLACKLIST	Bahia	End Time			Edit   State	
	EXTENSION DETAIL		State Numeric	?			
			ОК	Gancel			
			State Name				
-			🗹 Code State Name Start Ti	me End Time Action			
32			☑ 507 Colon 03:45 A	M 12:30 PM 🞯 🛛 🗴			
Land							
	ACTIVITY						
	DATASET						
				Save Cancel			
1.1							
	1997						
Ston	1. Now alick on the	"Ok" butto	n which will result re	moval of that da	to		
Step	+. Now click off the	OK DUILO	ii, willeli w <mark>ill lesuit le</mark>	moval of that ua	la.		
Edit	Zone (Area Coo	le)					
Stop	· When zone name	chows on 7	no dialing man page	than aliak on Ed	it laba <mark>l as sh</mark> own i	n niatura	
Step	. when zone name	shows on zo	one diamig map page	then check on Ed	it label as shown i	in picture	
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						1	
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0				🐐 Your Al	erts 💿 🛞 demo 👻	L Q Search	
© *	SMART DIAL	Country	USA	9 Your Al	erts 💿 🙆 demo 👻	Search     Area Code	
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© ** **	SMART DIAL	Country Zone Name Bahla	USA 2000 Jains Start Time End TimeZone Based 0017 AM 1733	<ul> <li>Your Al</li> <li>Time Time Zone</li> <li>PM America/Bahta I</li> </ul>	erts 🕢 🛞 demo = Hamber klentification 0300	C Search TimeZone Bassi Arton Cote Attor Attor Attor Attor Attor	-
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() () () () () () () () () () () () () (	SMART DIAL DEF MODE PERMISSION SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION	Courtry Zone Hand Batia Panama	USA Zerse Dialitie start Time End TimeZone Baard 06(17 AM 17)3 Area Code 03(45 AM 12)3	Vour Al     Vour Al     Vour Al     Vour     Proceeding Anner Car/Bahla     Proceeding Anner Car/Parlama	erts (1) (2) demo *	Action Active/The-active	-
© * © #	SMART DIAL USER MODE PERMISSION SMS CONFIG EMAIL CONFIG ELACKLIST EXTENSION DETAIL USER DISPOSITION 2 ZONE DIALING MAP	Courtery Zone Hane Baha Penema	USA Zoong Oalang Accel TimeZone Based Oo17 AM 1733 Area Code O345 AM 1213	Your Al     Time Zone     Your Al     Pane     Your AnnorCartaint     PA     AmericartPanama     PA	errs  end tanber klenthfuation tanber tanber klenthfuation como como como como como como como co	Courch     TimeZone Basel     Action     Action/Delactive     Edit 1388     D      Guestion     Sopen	-
© * © # ₽ 9	EMART DIAL USER MODE PERMISSION SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION 2 ZONE DIALINE MAP CHAT GROUPS	Courstry Zone Name Bahia Panama	USA 2000 Olar 10 Start Time End TimeZone Based 00:17 AM 17:33 Area Code 03:45 AM 12:35	Your At     Time Time     Time Zare     PM Anerica/Parana     PM	erra (2) (2) erro ( henter statisfication (1) error (2) error	C Search TimeZoue Basel Arton Code Edit : State 	-
	SMART DIAL USER MODE PERMISSION EMAIL CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION CONF DIALING MAP CHAT GROUPS LEAD SOURCE SKUL MATER	Courtry Zere Hare Bahis Panama	USA Zoood Zoood TimeZone Based Area Code OSJ45 AM 12132	Your Al     Your Al     Your Al     You     You	errs	Cearch     TimeZone Basel     Action     Action     Action     Action     Edit 1348e     Edit 1348e     Open	-
	SMART DIAL DEF MODE PRIMISSION SMS CONFIG EMAIL CONFIG EMAIL CONFIG EXTENSION DETAIL USER DISPOSITION CHAT GROUPS LEAD SOURCE SKILL MASTER DEFAULT AUTO LOGIN	Country Zone Henre Bette Pernens	USA Zonne Dalareg Baard Coli 7 AAA 1733 Time2 Grief Baard Coli 7 AAA 1733 Area Code Coli 45 AAA 12135	Your Al     Time Time     Time Zone     PM Anerica/Parama     PM	erts	C Search TimeZore Basel Artion Active/Dare tree Edit 1 State	-
	SMART DIAL USER MODE PERMISSION SMS CONFIG EMAIL CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DISPOSITION 2 ONE DIALING MAP CHAT GROUPS LEAD SOURCE SKILL MASTER DEFAULT AUTOL DOGIN ACTIVITY	Courstry Zone Henro Bahra Panama	USA <u>Zonny Galang</u> TimeZone Based Area Code 0345 AM 1213	Your Al     Time Zone     Time Zone     PM. Anero(ca/Pariama       PM.	errs a constant of the edit dialog box	Concel Concel	-
	SMART DIAL USER MODE PERMISSION SMS CONFIG EMAIL CONFIG ELACKLIST EXTENSION DETAIL USER DISPOSITION 2 ZONE DIALING MAP CHAT GROUPS LEAD SOURCE SKILL MASTER DEFAULT AUTO LOGIN ACTIVITY DATASET	Courtey Zorre Hanor Bahia Parama	USA 2017 State Time End TimeZone Based 00:17 AA 17:33 Area Code 03:45 AM 12:35	Your At     Time Time Zone     PM Anerica/Panana     PM	erra (2) (2) erro ( hencer stanthrutter and and and and and and and and	C Search TimeZoue Basel Arton Code Litt : State 	-
	SMART DIAL     SER MODE PERMISSION     SMARL CONFIG     EMAIL CONFIG     EMAIL CONFIG     EACKLIST     EXTENSION DETAIL     USER     DISPOSITION     ZONE DIALING MAP     CHAT GROUPS     LEAD SOURCE     SKILL MASTER     DEFAULT AUTO LOGIN     ACTIVITY     DATASET     DATASET     DATASET     DATASET CONFIG	Courty Courty Reto Parama	USA Zotop Dolling Start Time End TimeZone Based 00:17 AM 17:13 Area Code OSI45 AM 1213	Your Al     Trins Jone     PM Anerica/Bahla     PM Anerica/Parama	erra	Cearch     TimeZone Basel     Arteo Code     TimeZone Basel     Arteo Code     TimeZone Basel     TimeZone     TimeZone Basel     TimeZone     TimeZone Basel	-
	EXTENSION SIMS CONFIG EMAIL CONFIG EMAIL CONFIG EMAIL CONFIG EXTENSION DETAIL USER DISPOSITION CONE DIALING MAP CHAT GROUPS LEAD SOURCE SKILL MATTER DEFAULT AUTO LOGIN ACTIVITY DATASET DATASET CONFIG MAP MOBILE DEVICE	Country Zore Henre Bette Perrens	USA Zone Dang Saat Time End TimeZone Baard Os17 AM 1733 Area Code O3145 AM 1213	Your Al     Time Time     Time Zone     PM AnnerCarDahta I     PM AnnerCarDahta I	erts	Correct     TurneZorer Basel     Actuar Anna Cube     TurneZorer Basel     TurneZorer Ba	
	SMART DIAL USER MOGE PERMISSION SMS GONFIG EMAIL CONFIG EMAIL CONFIG EXTENSION DETAIL USER DISPOSITION CHAT GROUPS LEAD SOURCE BRILL MASTER DEFAULT AUTO LOGIN ACTIVITY DATASET DATASET MAP MOBILE DEVICE	Country Zone (reme Bahra Panama	USA <u>Zong ola Ing</u> TimeZone Based Area Code 03/45 AM 12:30	Your Ai     Time Zone     Your Ai     PM. AnnorCarDahia I     PM. AnnorCarDahia I     PM. AnnorCarDahia I	ers 2 Con	Constant - State	-
	SMART DIAL     SER MODE PERMISSION     SMARL CONFIG     EMAIL CONFIG     EMAIL CONFIG     EXTENSION DETAIL     USER     OISPOSITION     OONE DIALING MAP     CHAT GROUPS     EAL ONOUCE     ERLL MASTER     DEFAULT AUTO LOGIN     ACTIVITY     DATASET     D	Courtery Courtery Bahia Panama	USA <u>Anneal Contents</u> TimeZone Based 00,17 AA 17,33 Area Code 03,45 AA 12,30	Your Ar     Time Zone     Time Zone     Tome Zone	erra a Provincia de la consecuencia de la consecuen	C Scarch TimeZoue Basel Arton Code Litt : 1.542 Date : :	-
© ** C° ** • * • • • • • • • • • • • • •	SMART DIAL USER MODE PERMINESTION EMAIL CONFIG EMAIL CONFIG EMAIL CONFIG EXTENSION DETAIL USER DISPOSITION CHAT GROUPS LEAD SOURCE SKILL MASTER DEFAULT AUTO LOGIN ACTIVITY DATASET DATASET DATASET DATASET CONFIG MAP MOBILE DEVICE	Country Country Data Data Persona Dox appears	USA TimeZone Based 06:17 AM 1738 Area Code Stats follows:	Vour Al     V	erta	C Cearch TimeZoure Basel Arres Cade Later 1 State Dut 1 State Dut 1 State	-
Step2	E SMART DIAL DER MODE IRMINISION SIMS CONFIG EMAIL CONFIG EMAIL CONFIG EXTENSION DETAIL USER DISPOSITION CHAT GROUPS LEAD SOURCE SIGNLI MATTER DESTON ACTIVITY DATASET DATASET DATASET DATASET DATASET DATASET CHAT CONFIG MAP MOBILE DEVICE	Coursery Denormalized Denormalized Personal	USA <u>Transforme Based 00117 AM 1733</u> <u>Areas Code</u> 03145 AM 12335 Stars follows:	Your Al     Time Zone     America/Datia     PM     America/Datia     PM	erra	Concel Transitions Based Actuar Area Cable Edd + 3 base Transitions Transitions Edd + 3 base Transitions Transitions Open	
Step2	SMART DIAL USER MOGE PERMISSION SMA CONFIG EMAIL CONFIG EMAIL CONFIG EXTENSION DETAIL USER DISPOSITION CHAT GROUPS LEAD SOURCE BRILL MASTER DEFAULT AUTO LOGIN ACTIVITY DATASET DATASET MAP MOBILE DEVICE 2: Edit Zone dialing	Country Deconstruct Batta Parama	USA <u>Trimescone Based 0017 AM 1733</u> Area Code 03/45 AM 1235 Sas follows:	Your Al     Y	ers 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	C Sarch ThursZour Basel Arton Cale July 1 State July 1 State Toppen	-
Step2	SMART DIAL USER MODE PERMISSION EMAIL CONFIG BLACKLET EXTENSION DETAIL USER DISPOSITION CHAT GROUPS LEAD SOURCE SKILL MASTER DEFAULT AUTO LOGIN ACTIVITY DATASET DATASET DATASET CAAT GROUPS EXTENSION DEFAULT AUTO LOGIN ACTIVITY DATASET CAAT SET DATASET CAAT SET DATASET DATASET CAAT SET DATASET CAAT SET DATASET DATASET DATASET CAAT SET DATASET DA	box appears	USA TimeZone Baard 00:17 AN 17.03 Avea Code Stats follows:	Vour Al     Trace Jone     PM Anerica/Parlama     PM Anerica/Parlama	erra a Provincia de la conservación de la conservac	C Scarch TimeZoure Basel Arton Code TimeZoure Basel Arton Code TimeZoure Basel TimeZoure Basel TimeZo	
Step2	SMART DIAL USER MODE PERMISSION SMS CONFIG EMAIL CONFIG EMAIL CONFIG EXTENSION DETAIL USER DISPOSITION COAT GROUPS LEAD SOURCE SKILL MASTER DEFAULT AUTO LOGIN ACTIVITY DATASET DATASET CONFIG MAP MOBILE DEVICE	Course y Course y Data Baita Persona box appears	USA Time2 cone Baard Col 17 AM 1733 Area Cole S as follows:	Vour Al     True     True     True     True     PM     AnnerCar/Batta     PM     AnnerCar/Batana	erra	Correct     TurneZorer Basel     Actuar Area Cube     TurneZorer Basel     TurneZorer Ba	
Step2	C SMART DIAL USER MODE PRIMISSION SMS CONFIG EMAIL CONFIG EMAIL CONFIG EXTENSION DETAIL USER DISPOSITION CHAT GROUPS LEAD SOURCE SKILL MASTER DERAUPS LEAD SOURCE SKILL MASTER DETAILS TOORIO MAP MOBILE DEVICE C: Edit Zone dialing	box appears	USA <u>TrimeZonie Based 0017 AM 1733</u> Area Code 03/45 AM 1235	Your Al           Your Al           Your Al           PM           America/Data           PM	erra	Correl TurneZoure Basel Actor Acto	
Step2	SMART DIAL USER MODE PERMISSION EMAIL CONFIG ELACKLIST EXTENSION DETAIL USER DISPOSITION CHAT GROUPS LEAL MASTER DEFAULT AUTO LOGIN ACTIVITY DATASET DATASET DATASET CHAT GROUPS LEAL MASTER DEFAULT AUTO LOGIN ACTIVITY DATASET DATASET CHAT ZONE dialing	box appears	USA <u>Accessed on other and the state throw is noted</u> <u>Throw Control Based</u> 00117 AM 1733 Area Code 03145 AM 1733 Area State S as follows:	Your Al     Time Zone	era	Copen	



Edit/Delete Zone	
All form fields are required.	
Zone Name	
Panama Select the Time Zone	
Start Time	
17:30 Select the Start and End Time	
Dialing Number Identification	
XXX******* Enter the dialing number identification	
Note:         Identification           XXX         (=Zone searching state code)	
(=None searching state code)	
Click on Save button	
Pelete Save Cancel	
Step3: Edit option available on Time Zone, dialing number identification, Start and End time	
Step 4: When edition done then click on Save button to undate the changes	
Step4. when callon done then enex on save button to update the changes.	
Delete Zone (Area Code)	
Step I. When some name shows on some dialing man page than aligh an Edit label as shown in nicture	
Step1. when zone name shows on zone draining map page then circk on Edit laber as shown in picture	
and the second se	
SMART DIAL <sup>44</sup> / Your Alerts	
Image: Smart Dial**     % Your Alerts ()     ()     demo *     C search       Image: Smart Dial**     % Your Alerts ()     ()     ()     TimeScare Basel       Image: Smart Dial**     ()     ()     ()     ()     ()	
Image: Second PERMISSION     Country     USA     Image: Second PERMISSION       SMS CONFIG     Country     USA <t< td=""><td></td></t<>	
Courtery     USE     Source Fermination     Courtery     USE     Courtery     Courtery<	
Constraint     Search       International     Search	
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Step2: Edit Zone dialing box appears as follows:	
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Smart Dial*       * voir Alet2       * voir Alet2       * errer         User Model Fermiestion       * voir Alet2       * errer       * errer         User Model Fermiestion       * errer       * errer       * errer         User Model Fermiestion       * errer       * errer       * errer         User Model Fermiestion       * errer       * errer       * errer         User       * errer       * errer       * errer       * errer         User       * errer       * errer       * errer       * errer       * errer         User       * errer	
Image constrained       Im	
Step2: Edit Zone dialing box appears as follows:	
Step2: Edit Zone dialing box appears as follows:	
SMART DIAL*       Volation       Image: Control of the control	
Step2: Edit Zone dialing box appears as follows:	
Step2: Edit Zone dialing box appears as follows:	
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Step2: Edit Zone dialing box appears as follows:	
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Step2: Edit Zone dialing box appears as follows:	



Edit/Delete Zone
All form fields are required
Autorin fields are required.
Time Zone
[-05:00] - America/Panama
Zone Name
Panama
Start Time
08:45
End lime
17:30
Dialing Number Identification
XXX******
Note: XXX (=Zone searching state code)
(-None searching state code)
Click on Doloto button
Delete Save Cancel

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

0	≡ SMART DIAL <sup>**</sup>					÷ You	ur Alerts 🤇	🖸 🛞 demo 👻	Q Sear	rch
*	USER MODE PERMISSION	Country	USA		-				+ TimeZ	one Based
-	SMS CONFIG		Zone Dialing						+ Area C	ode
****	BLACKLIST	Zone Name	Mode	Start Time	End Time	Time Zone		Number Identification	Action	Active/De-active
C		Bania	Timezone Based	05:17 AM	17:35 PM	America/Bahia	[-03:00]	vvv	Edit   State	
	USER									
	DISPOSITION									
-	ZONE DIALING MAP							Tick on checkbox to A	Active zone	
-	CHAT GROUPS									
	LEAD SOURCE									
-111	SKILL MASTER									
	DEFAULT AUTO LOGIN									
	ACTIVITY									
	DATASET									
	DATASET CONFIG									
	MAP MOBILE DEVICE									
Step2: Tick checkbox to active the zone for dialing										
Or										
Step2	2: Untick on checkl	oox to Inacti	ve the zon	e for di	ialing.					



### 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 SMART DIAL 0 0 - 0% SMS CONFIG No Login EMAIL CONFIG 0 - 0% BLACKLIST EXTENSION DETAIL Talk Status Mode Details Agent Status Idle Status Wrapup USER DISPOSITION 0 0 00:00:00 00:00:00 00:00:00 ZONE DIALING MAP CHAT GROUPS LEAD SOURCE Click on Chat Groups sub menu SKILL MASTER ACTIVITY DATASET DATASET CONFIG Step2: Chat Group page appears as follows: SMART DIAL 0 O SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL Click on + icon to add new chat group DISPOSITION ZONE DIALING MAP CHAT GROUPS LEAD SOURCE SKILL MASTER DEFAULT AUTO LOGIN ACTIVITY

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



Create New Group	×
All form fields are required.	
Group	
support	
1. Enter the C	Group name here
	Click on Save button 2.
	Save Cancel

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"









**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





Add Lead Source	×
Campaign:	S No DID Priority
DEMO -	
	1 01171600800
Lead Stores in: 💿 Lead 💿 Callback	1. Select the campaign
Source Type	
Missed On IVR	2. Click on Caliback radio button to select it
Assign Policy	3. Select source type as API/Email/Missed on
Manual	TVR OF ACD/Caliback scheduled by Agenit
	4. Select the assign policy as Manual/Automatic/View
Dialing Preference	
Auto	- Select the dialing preference as Auto/Double Click
Priority	b. Obleat the dialing preference as ratio boable orient
1	
	6. Select the Priority
	7. Click on Save button
	Next Reset Save Retry Configuration Cancel
Step4: Then fill up the appropriate data as shown in	above picture
Step 5. After that click on Save button to save the dat	a
Edit Lead Source (Callback)	
Step1: Consider the steps as above for opening Lead	Source page
Step2: Lead source page appears as follows:	
Step2. Deud source page appears as fonows.	
USER STATUS COLOUR	∲ Your Alerts 0 ( ) demo ▼ Q Search
SMS CONFIG Algorithm Priority Time Lead Generation	Image: Constraint of the second sec
EMAIL CONFIG	AUTOMATIC AUTO 1 ADMIN 22 Apr. 2020
Edit Lead Source	S.No. DID Priority 1.
USER © Lead Stores in: Caliback	O1171600800     Default     Click on this icon to open Edit Lead Source
ZONE DIALING MAP Source Type Missed On IVR	
CHAT GROUPS Assign Policy Automatic	
LEAD SOURCE Dialing Preference	2. Edit option available on campaign selection
DEFAULT AUTO LOGIN Priority	Lead stores, Source type, Assign policy, dialing preference and priority
ACTIVITY	
DATASET	Click on Save button to update the changes
	3. Next Reset Save Retry Configuration Cancel
IN A MORE DE TOL	
Ston2. Then along the energy rists data as shown in	abava niatura
steps. Then change the appropriate data as shown in	above picture
Step4: After that click on Save button to update the o	changes
Delete Lead Source (Callback)	
Diete Leau Bource (Caliback)	
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
SMART DIAL <sup>16</sup> 9 Your Alex       1 Your Alex
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.
Add Lead Source (Lead)
Step1: Go to system configuration menu, Click on "Lead Source" sub menu to enable appearance of Lead Source page
Image: Sign of the second s
Image: Service Servic
Step2: Lead source page appears as follows:



SMART DIAL <sup>™</sup>	🐐 Your Alerts 💿 😡 demo 👻 Q. Search	
SMS CONFIG		
EMAIL CONFIG BLACKLIST		
EXTENSION DETAIL	Click on + Icon to 'Add Lead Source wizard	
Skill MASTER		
ACTIVITY	Lead Source Home Page	
DATASET DATASET CONFIG		
MAP MOBILE DEVICE		
Step3. Click on + icon to c	ppen "Add Lead Source" dialog box	
Steps: ener on v teen te e	pen ridu Beau Source alarog oon	
Add Lead Source	×	
Campaign:	S.No. DID	
DEMO	<ul> <li>✓</li> <li>1</li> <li>01171600800</li> <li>2</li> <li>01171600801</li> </ul>	
Lead Stores in: <ul> <li>Lead _O_Call</li> </ul>	back 1. Select the campaign	
Dialing Mode Auto	2. Click on Lead radio button to select it	
Retry Type:  No Retry  Man	<ol> <li>Select dialing mode as Auto/Progressive/Preview</li> </ol>	
Source Type	Click on No Retry/Manual/Automatic 4. radio button to select it	
Missed On ACD	5. Select the Source type as API/Email/Missed	
Dialing Algorithm: O LIFO O	FIFO	
Priority Time: O On Time Off	Time Click on On/Off Time radio button to select it	
Lead Name Generation :	Weekly Monthly 7.     Click on Daily/Weekly/Monthly radio	
Click on Next butto	8. button to select it	
	9. Next Reset Save Save Retry Configuration Cancel	
and the second second		
Stop 4: Fill up the appropri	ate date as shown in above nicture then aliels on "Next" hutton	
Step4. I'll up the appropri	ate data as shown in above picture then check on Next Outton	
Ston5: After elighing on M	ave button page ennears of follows:	
Steps. After clicking on N	ext button page appears as follows.	
Add Load Source		
No. of Days Start	Time End Time Per Day Attempt Max Attempt Disposition Retry Type	
1 Day(s)	2 Time • 10 Max Attempt • No Retry Attempt Type •	
1.	2	
Select the number of days from 1 to 10	ect the Start and 5.	
End	3. Select the retry type as	
	Select the per day attempt 2 to 10 2. Agent Disposition 3. Agent Sub Disposition	
	4. 4. 5. Dialer & Agent Sub disposition	
	attempt 2 to 30	
	Auto Retry Page for set the configuration	
	Next         Reset         Save         Save Retry Configuration         Cancel	
<ul><li>Select the nu</li></ul>	mber of days from 1 to 10	



- 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:

<complex-block></complex-block>	Add Lead Source			×
<complex-block><list-item></list-item></complex-block>	No. of Days Start Time End Time	e Per Day Attempt Max Atte	empt Disposition Retry Type	
<complex-block></complex-block>	10 Day(s) • 09:30 18:30	3 Time - 10 Max /	Attempt 👻 Dialer Disposition	•
<complex-block></complex-block>	# Dialer Disposition	No. Of Attempt	Set Minutes	
<complex-block><ul> <li>Controlled in the same also retry configuration." But the respective disposition of retry.</li> <li>Select number of attempt to set the respective disposition of retry.</li> <li>Select the minutes to set retry time for respective disposition.</li> <li>Steps: After click on "Save Retry Configuration" button then a popup message shows as "Want to save auto retry configuration to water the retry configuration to the save the respective disposition of retry.</li> <li>Select the minutes to set retry time as above</li> <li>Steps: After click on "Save Retry Configuration" button then a popup message shows as "Want to save auto retry configuration to save the retry time for the save the retry configuration to the s</li></ul></complex-block>	1 AGENT BUSY - MAXIMUM WAIT TIME 2 ANSWERING MACHINE	Select Attempt	Select Minute     Select Minute	
<complex-block></complex-block>	3 CUSTOMER BUSY	2 Attempt	Select Minute     Select Minute     Select Minute	
<complex-block></complex-block>	4 CUSTOMER HANGUP IN QUEUE	Select Attempt	✓ Select Minute ✓	
<complex-block></complex-block>	5 NETWORK CONGESTION	Select Attempt	▼ Select Minute ▼	
<complex-block></complex-block>	6 REJECTED BY SWITCH	2 Attempt	The second sec	
<complex-block></complex-block>	7 RINGING - NO ANSWER	3 Attempt	← 10 Minutes	
<complex-block></complex-block>	Select num respective	6. Iber of attempt to set the disposition for retry	Select the minutes to se retry time for respective disposition	at ;
<list-item><list-item></list-item></list-item>	Click on this bu	itton to save the configuration	,	
<ul> <li>Select number of attempt to set the respective disposition of retry</li> <li>Select the minutes to set retry time for respective disposition</li> <li>Step7: Set the number of attempts and retry time as above</li> <li>Step8: After click on "Save Retry Configuration" button then a popup message shows as "Want to save auto retry configurate with Ok and Cancel button.</li> </ul>		Next Reset S	Save Save Retry Configuration Can	cel
Select the minutes to set retry time for respective disposition Step: Set the number of attempts and retry time as above Step: After click on "Save Retry Configuration" button then a popup message shows as "Want to save auto retry configuration" to kan d Cancel button. Image: Set the number of attempt of the number of the numb	<ul><li>Select number of a</li></ul>	ittempt to set the respec	tive disposition of retry	
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 button.	Select the minutes	to set retry time for resp	pective disposition	
Step 3: After click on "Save Retry Configuration" button then a popup message shows as "Want to save auto retry configuration button then a popup message shows as "Want to save auto retry configuration of a definition o	step 7: Set the number of attempts at	d retry time as above		
Rep8: After click on "Save Retry Configuration" button then a popup message shows as "Want to save auto retry configuration to and Cancel button.	step 7. Set the number of attempts a	id felly time as above		
Step 8: A fter click on "Save Retry Configuration" button then a popup message shows as "Want to save auto retry configuration with Ok and Cancel button.				
Attend Source         Voct Day(s)         Vot Day(s)      <	Sten8. After click on "Save Retry Co	onfiguration" button the	en a nonun message shows a	s "Want to save auto retry configuration
X          X <td< th=""><th>Steps. Anter click off Save Kerry Co</th><th>Jingulation outton the</th><th>in a popup message shows a</th><th>is want to save auto fetty configuratio</th></td<>	Steps. Anter click off Save Kerry Co	Jingulation outton the	in a popup message shows a	is want to save auto fetty configuratio
Ad Lead Source       X         No. of Days       Start Time End Time Per Day Attempt       Max Attempt       Disposition Retry Type         10 Day(s)       me       10 Max Attempt       Dialer Disposition         Plater Disposition       me       10 Max Attempt       Dialer Disposition         A CENT BUSY - M       want to save auto retry configuration       me       10 Max Attempt       Select Minute         2 ANSWERING MAC       OK       Cancel       Select Attempt       Select Attempt       Select Attempt         3 CUSTOMER HANGUP IN QUEUE       Select Attempt       Select Attempt       Select Attempt       Select Attempt         5 NETWORK CONGESTION       Select Attempt       Select Attempt       Select Attempt       Select Attempt         6 REJECTED BY SWITCH       2 Attempt       10 Minutes       115 Minutes       I10 Minutes         7 RINGING - NO ANSWER       3 Attempt       10 Minutes       I0 Minutes       I0 Minutes         Click on Ok button       Mext       Save Retry Configuration       Cancel	with Ok and Cancel button.			
Add Lead Source       X         No. of Days       Start Time End Time Per Day Attempt       Max Attempt       Disposition Retry Type         10 Day(s)       me       10 Max Attempt       Dialer Disposition       Image: Comparison of the save auto retry configuration.         2       ANSWERING MAC       Want to save auto retry configuration.       Image: Comparison of the save auto retry configuration.       Image: Comparison of the save auto retry configuration.       Image: Comparison of the save auto retry configuration.         3       CUSTOMER BUSY       OK       Cancel       Select Attempt       Select Minute         4       CUSTOMER HANGUP IN QUEUE       Select Attempt       Select Attempt       Select Attempt         5       NETWORK CONGESTION       Select Attempt       Select Attempt       Select Minute         6       REJECTED BY SWITCH       2 Attempt       15 Minutes       Image: Comparison of the same				
No. of Days       Start Time End Time Pay Attempt       Disposition Retry Type         10 Day(s)       me       10 Max Attempt       Dialer Disposition         2 Dialer Disposition       me       10 Max Attempt       Dialer Disposition         2 ANSWERING MAC       Select Attempt       Select Minute       Select Minute         3 CUSTOMER BUSY       OK       Cancel       2 Attempt       Select Minute         4 CUSTOMER HANGUP IN QUEUE       Select Attempt       Select Minute       Select Minute         5 NETWORK CONGESTION       Select Attempt       Select Minute       Select Minute         6 REJECTED BY SWITCH       2 Attempt       Select Minute       Select Minute         7 RINGING - NO ANSWER       3 Attempt       10 Minutes       ID Minutes         6 REJECTED BY SWITCH       3 Attempt       10 Minutes       ID Minutes         7 RINGING - NO ANSWER       Next       Reset       Save Save Retry Configuration       Cancel				(C)
No. of Days       Start Time End Time Per Day Attempt       Max Attempt       Disposition Retry Type         10 Day(s)       me       10 Max Attempt       Dialer Disposition         2       Olaler Disposition       Image: Construction Construction       Image: Construction Construction         2       ANSWERING MAC       Image: Construction Construction       Image: Construction Construction         3       CUSTOMER BUSH       Image: Construction Construction       Image: Construction Construction         4       CUSTOMER HANGUP IN QUEUE       Select Attempt       Image: Select Attempt         5       NETWORK CONGESTION       Select Attempt       Select Attempt         6       REJECTED BY SWITCH       2       Attempt       15         7       RINGING - NO ANSWER       3       Attempt       10         INIGING - NO ANSWER       10       Minutes       Image: Construction	Add Lead Source			
10 Day(s)       me       •       10 Max Attempt       •       Dialer Disposition       •         2       Answering Mac       •	No. of Days Start Time End Tin	ne Per Day Attempt Max Att	tempt Disposition Retry Typ	e
Want to save auto retry configuration. A GENT BUSY - M A GENT BUSY - M C ANSWERING MAC C USTOMER BUSY C USTOMER HANGUP IN QUEUE Select Attempt Select Attempt Select Attempt Select Attempt Select Attempt Select Attempt Select Attempt Select Attempt C Attempt Select Attempt C Attempt Select Attempt C Attempt Select Attempt C Attempt Select Attempt C Attempt Select Attempt Select Attempt C Attempt Select Attempt C Attempt Select Attempt C Attempt Select Attempt C Attempt Select Attempt C A	10 Day(s)	me 👻 10 Max	x Attempt 👻 Dialer Disposition	-
Adder Disposition       O. Or Artempt       Select Attempt         A AGENT BUSY - M       Select Attempt       Select Attempt         Customer Busy       OK       Cancel       Select Attempt         Customer Busy       OK       Cancel       Select Attempt         Select Attempt       Select Attempt       Select Minute         Customer Handup IN QUEUE       Select Attempt       Select Minute         NETWORK CONGESTION       Select Attempt       Select Minute         REJECTED BY SWITCH       2 Attempt       Select Attempt         T RINGING - NO ANSWER       3 Attempt       10 Minutes         Click on Ok button       Keset       Save Retry Configuration	Want to save auto retry configu	iration.!		
1       Active bost File         2       ANSWERING MAC         3       CUSTOMER BUSY         4       CUSTOMER HANGUP IN QUEUE         5       NETWORK CONGESTION         6       REJECTED BY SWITCH         7       RINGING - NO ANSWER         3       Attempt         4       CLICTED BY SWITCH         5       Attempt         6       REJECTED BY SWITCH         7       RINGING - NO ANSWER         3       Attempt         4       CLICK on OK button	Dialer Dispositio     AGENT BUSY - M	Select Attempt	Set Minutes	
2       ANSWERING MAC       OK       Cancel       Select Attempt       Select Minute         3       CUSTOMER BUSY       Z Attempt       Select Attempt       Select Minute         4       CUSTOMER HANGUP IN QUEUE       Select Attempt       Select Minute       Select Minute         5       NETWORK CONGESTION       Select Attempt       Select Minute       Select Minute         6       REJECTED BY SWITCH       Z Attempt       15 Minutes       10 Minutes         7       RINGING - NO ANSWER       3 Attempt       10 Minutes          Next       Reset       Save Retry Configuration	A AGENT BOST - M	Select Attempt	• Select Minute •	
3       CUSTOMER BUSY       2 Attempt       5 Minutes         4       CUSTOMER HANGUP IN QUEUE       Select Attempt       Select Minute         5       NETWORK CONGESTION       Select Attempt       Select Minute         6       REJECTED BY SWITCH       2 Attempt       15 Minutes         7       RINGING - NO ANSWER       3 Attempt       10 Minutes         Next         Next         Next	2 ANSWERING MAC	Select Attempt	✓ Select Minute	
4       CUSTOMER HANGUP IN QUEUE       Select Attempt       Select Minute         5       NETWORK CONGESTION       Select Attempt       Select Minute         6       REJECTED BY SWITCH       2 Attempt       15 Minutes         7       RINGING - NO ANSWER       3 Attempt       10 Minutes         OLick on Ok button	3 CUSTOMER BUSY	2 Attempt	✓ 5 Minutes ✓	
5       NETWORK CONGESTION         6       REJECTED BY SWITCH         7       RINGING - NO ANSWER         3       Attempt         0       Minutes         0       Minutes         0       Click on Ok button	4 CUSTOMER HANGUP IN QUEUE	Select Attempt	✓ Select Minute ✓	
6 REJECTED BY SWITCH 7 RINGING - NO ANSWER 2 Attempt • 15 Minutes • 10 Minutes • Click on Ok button Next Reset Save Save Retry Configuration Cancel	5 NETWORK CONGESTION	Select Attempt	▼ Select Minute ▼	
7 RINGING - NO ANSWER Click on Ok button Next Reset Save Save Retry Configuration Cancel		2 Attempt		
7     RINGING - NO ANSWER       3     Attempt       Click on Ok button	O REJECTED BT SWITCH	2 Attempt	▼ 15 Minutes ▼	
Click on Ok button           Next         Reset         Save         Save Retry Configuration         Cancel	7 RINGING - NO ANSWER	3 Attempt		
Click on Ok button				
Next Reset Save Save Retry Configuration Cancel				
Next Reset Save Save Retry Configuration Cancel	Click	on Ok button		
Next Reset Save Save Retry Configuration Cancel	Click	on Ok button		
Next     Reset     Save     Cancel	Click	on Ok button		
Next         Reset         Save         Save Retry Configuration         Cancel	Click	on Ok button		
Hext Reset Save Save Retry Configuration Cancel	Click	on Ok button		
	Click	on Ok button		
	Click	on Ok button	Save Save Retry Configuration C	Incel



# 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".

A							
N	o. of Days	Start Time End Tim	e Per Da	v Attempt	Max Attempt	Disposition F	Retry Type
	10 Day(s)			-	10 Max Attemp	t 👻 🛛 Dialer Dispos	sition 👻
H	Dialer Dispos	Saved Successfully.		Of Attempt			
1	AGENT BUSY			elect Attempt	t 👻	Select Minute	~ ]
2		_		elect Attempt	t v	Select Minute	~
3	CUSTOMER B		OK	Attempt	-	5 Minutes	~
4	CUSTOMER HANGUP IN C	2UEUE		Select Attempt	t v	Select Minute	~
5	NETWORK CONGESTION		$ \rightarrow $	Select Attempt	t	Select Minute	*
6	REJECTED BY SWITCH		N I	2 Attempt	-	15 Minutes	
7	RINGING - NO ANSWER		l (	Attempt	-	10 Minutes	
			Click of	n Ok button	]		
						Save Retry Configurat	tion Cancel

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

0	≡ SMART DIAL"	,					5 Yo	our Alerts 🛛 💿	🛞 demo 👻	Q Search	
~	USER MODE PERMISSION								φ +		
	SMS CONFIG	#	Campaign	Source Type	Dialing Mode	Storage	Algorithm	Priority Time	Lead Generation Algo	Assign Policy	Dialing Pref
- CC	EMAIL CONFIG	1	DEMO	MISSED ON IVR	CALLBACK	CALLBACK				AUTOMATIC	AUTO
en	BLACKLIST	-									
• • ·	EXTENSION DETAIL	2	DEMO	MISSED ON ACD	AUTO	LEAD	FIFO	OFFTIME	DAILY		
- <b>2</b>	USER										
	DISPOSITION										
	ZONE DIALING MAP										
- 22	CHAT GROUPS										
1	LEAD SOURCE										
1.111	SKILL MASTER										
	DEFAULT AUTO LOGIN										
	ACTIVITY										
	DATASET										
	DATASET CONFIG										
	MAP MOBILE DEVICE										
<u>Edit</u>	Lead Source (Leac	<u>1)</u>									



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

0	=	≡ SMART DIAL <sup>**</sup>						🐐 Your Alerts	• (	🔊 demo 👻		search
*		USER MODE PERMISSION							Φ	+		
		USER STATUS COLOUR	Storage	Algorithm	Priority Time	Lead Generation Algo	Assign Policy	Dialing Preference	Priority	Added By	Added On	Action
-96		SMS CONFIG	CALLBACK				AUTOMATIC	AUTO	1	ADMIN	22 Apr, 2020	<b>•</b>
C.		EMAIL CONFIG	LEAD	FIFO	OFFTIME	DAILY				ADMIN	23 Apr, 2020	
		BLACKLIST									/	
		EXTENSION DETAIL										
		USER										
		DISPOSITION							Click on t	nis icon to e	dit the lead so	ource
		ZONE DIALING MAP										
and a		CHAT GROUPS										
	-	LEAD SOURCE										
		SKILL MASTER										
		DEFAULT AUTO LOGIN										
		ACTIVITY										
		DATASET										
		DATASET CONFIG										

Step3: Edit lead source page appears as follows:

Edit Lead Source			×	
Campaign:	S.No.	DID	*	
DEMO -	1	01171600800		
Lead Stores in: 💿 Lead 💿 Callback	2	01171600801		
Dialing Mode				
Auto 👻				
Retry Type: <ul> <li>No Retry</li> <li>Manual</li> <li>Automatic-</li> </ul>				
Source Type				
Missed On ACD •	Editor	tion not available		
Dialing Algorithm:  © LIFO	on this	section		
Priority Time: 🔘 On Time 🖲 Off Time				
Lead Name Generation :      O Daily      Weekly      Monthly				
			-	
Click on Next button				
Ne	ext Reset Save	Save Retry Configuration	Cancel	
Edit option not available	e in this nage			
	e in this puse			
nA: After clicking on Next button, edit lead	source nade ann	are as follows:		
p4. Alter cheking on Next button, eutrieau	source page appo	ais as 10110ws.		



10 Day(s)       09:30       18:30       3 Time       10 Max Attempt       Dialer Disposition       •         Dialer Disposition       No. Of Attempt       Set Minutes         AGENT BUSY       MAXIMUM WAIT TIME       Select Attempt       •       Select Minute       •         ANSWERING MACHINE       Select Attempt       •       Select Minute       •       •       Select Minute       •         CUSTOMER BUSY       2 Attempt       •       Select Minute       •       Select Minute       •         CUSTOMER HANGUP IN QUEUE       Select Attempt       •       Select Minute       •         NETWORK CONGESTION       Select Attempt       •       Select Minute       •         REJECTED BY SWITCH       2 Attempt       •       15 Minutes       •         RINGING - NO ANSWER       3 Attempt       •       10 Minutes       •         Click on Reset button to gives the option for edit retry setting       •       Supplemention       Cancel	lo. of Days	Start Time End Time Per I	ay Attempt	Max Attemp	t	Disposition Retry	Туре	
Dialer Disposition     No. Of Attempt     Set Minutes       AGENT BUSY - MAXIMUM WAIT TIME     Select Attempt <ul> <li>Select Minute</li> <li>Select Minute</li> <li>Select Minute</li> <li>Select Attempt</li> <li>Select Minute</li> <li>Minutes</li> <li>Minutes<!--</td--><td>10 Day(s) -</td><td>09:30 18:30 3 T</td><td>me 👻</td><td>10 Max Atte</td><td>empt ·</td><td>Dialer Disposition</td><td>n</td><td>-</td></li></ul>	10 Day(s) -	09:30 18:30 3 T	me 👻	10 Max Atte	empt ·	Dialer Disposition	n	-
AGENT BUSY - MAXIMUM WAIT TIME     Select Attempt     -       ANSWERING MACHINE     Select Attempt     -       CUSTOMER BUSY     2 Attempt     -       CUSTOMER HANGUP IN QUEUE     Select Attempt     -       NETWORK CONGESTION     Select Attempt     -       REJECTED BY SWITCH     2 Attempt     -       RINGING - NO ANSWER     3 Attempt     -	# Dialer Disposition		lo. Of Attempt		S	et Minutes		
ANSWERING MACHINE Select Attempt * Select Minute * CUSTOMER BUSY 2 Attempt * 5 Minutes * CUSTOMER HANGUP IN QUEUE Select Attempt * Select Minute * NETWORK CONGESTION Select Attempt * Select Minute * REJECTED BY SWITCH 2 Attempt * 15 Minutes * RINGING - NO ANSWER 3 Attempt * 10 Minutes * CLick on Reset button to gives the option for edit retry setting	AGENT BUSY - MAXIMUM	WAIT TIME	Select Attempt	-	[	elect Minute	-	
CUSTOMER BUSY       2 Attempt       •         CUSTOMER HANGUP IN QUEUE       Select Attempt       •         NETWORK CONGESTION       Select Attempt       •         REJECTED BY SWITCH       2 Attempt       •         RINGING - NO ANSWER       3 Attempt       •         Click on Reset button to gives the option for edit retry setting       •       •	2 ANSWERING MACHINE		Select Attempt	~		elect Minute	-	
CUSTOMER HANGUP IN QUEUE     Select Attempt         NETWORK CONGESTION     Select Attempt         REJECTED BY SWITCH     2 Attempt         RINGING - NO ANSWER     3 Attempt         Click on Reset button to gives the option for edit retry setting	3 CUSTOMER BUSY		2 Attempt	-	[	5 Minutes	-	
NETWORK CONGESTION     Select Attempt     Select Minute       REJECTED BY SWITCH     2 Attempt     15 Minutes       RINGING - NO ANSWER     3 Attempt     10 Minutes	4 CUSTOMER HANGUP IN QI	JEUE	Select Attempt	-	[	elect Minute	-	
REJECTED BY SWITCH     2 Attempt     15 Minutes     •       RINGING - NO ANSWER     3 Attempt     10 Minutes     •       Click on Reset button to gives the option for edit retry setting	5 NETWORK CONGESTION		Select Attempt		[	elect Minute	-	
RINGING - NO ANSWER 3 Attempt 10 Minutes  Click on Reset button to gives the option for edit retry setting	6 REJECTED BY SWITCH		2 Attempt	-	Ī	15 Minutes	-	
Click on Reset button to gives the option for edit retry setting	7 RINGING - NO ANSWER		3 Attempt	-	Ē	10 Minutes	-	
Next Darat Save Save Petry Configuration Cancel		Click on Reset butto option for edit retry	n to gives the setting	e				
Next Reset Save Save Retry Configuration Cancel								
Next Reset Save Red y conlight about California			Next Res	set Save	Save	Retry Configuration	Cano	el

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

				×				
	y Attempt Max	x Attempt	Disposition Retr	у Туре				
	e - 10	Max Attempt	- Dialer Dispositi	on -				
Want to reset lead auto retry settings.!								
	elect Attempt	-	Select Minute	-				
	elect Attempt		Select Minute					
OK Cancel	Attempt		5 Minutes					
	Delect Attempt		Select Minute					
ESTION	Select Attempt		Select Minute					
лтсн	2 Attempt		15 Minutes					
SINCE A	2 Accompt		10 Minutes					
	Lo racempe		Lio Milluces					
	Next Reset			Cancel				
k on Ok button								
	Want to reset lead auto retry settings.!	Want to reset lead auto retry settings.! Want to reset lead auto retry settings.! OF Attempt elect Attempt elect Attempt Select Attempt Select Attempt 2 Attempt 2 Attempt Click on Ok button Next Reset k on Ok button	Want to reset lead auto retry settings.! Want to reset lead auto retry settings.! Peter Attempt Peter Attempt Peter Attempt Click on Ok button Next Reset Save Sa k on Ok button	Want to reset lead auto retry settings.!     Attempt     Max Attempt     Disposition Retr       Want to reset lead auto retry settings.!     Of Attempt     Dialer Disposition Retr       OK     Cancel     OK       OK     Cancel     Attempt       Select Minute     Select Minute       Select Attempt     Select Minute       Select Minute     Select Minute       ON OK button     Next	Want to reset lead auto retry settings.! Want to reset lead auto retry settings.! Of Attempt e v 10 Max Attempt v Diafer Disposition Retry Type e v 10 Max Attempt v Diafer Disposition v v of Attempt setect Attempt setect Minutes setect Minute setect Minute setect Minute setect Minute setect Minute setect Minute v 10 Minutes v 10 Minutes v 10 Minutes v 10 Minutes k on Ok button	Want to reset lead auto retry settings. Want to retry settings.	Want to reset lead auto retry settings.!       0 Max Attempt Pisposition Retry Type         OK       Cancel         OK       Cancel         Steet Attempt       Setect Minute         Setect Minute       Setect Minute         Setect Attempt       Setect Minute         Circle       Setect Attempt         Setect Minute       Setect Minute         Circle       Setect Attempt         Setect Minute       Setect Minute         Circle on Ok button       Setect Minutes         Rexet       Save Retry Configuration         Cancel       K on Ok button	Want to reset lead auto retry settings.! Ver th queue Select Attempt Ver th queue Select Attempt Select A



No	o. of Days		Start Tim	e End Time	Per Day Attempt	Max Atten	npt	Disp	osition Retr	у Туре	
1	0 Day(s)	-	09:30	18:30	3 Time 🔻	10 Max A	ttempt	• Dia	ler Dispositi	on	•
ŧ	Dialer Disposition				No. Of Attempt		s	et Minut	es		
1	AGENT BUSY - MAX	MUM V	AIT TIME		Select Attempt	-		Select Mi	nute	-	
2	ANSWERING MACHI	NE			Select Attempt	-	] [	Select Mi	nute	-	
3	CUSTOMER BUSY				2 Attempt	-	] [	5 Minute	5	-	
4	CUSTOMER HANGUE		EUE		Select Attempt	•	] [	Select Mi	nute	-	
5	NETWORK CONGESTION			Select Attempt	Select Attempt 👻			nute	-		
6	REJECTED BY SWIT	СН			2 Attempt	•		15 Minut	es	-	
7	RINGING - NO ANSV	/ER			3 Attempt	-		10 Minut	es	-	
		Edi	t the settir	ig for auto r ick on Save	etry as required	on for up	dation				
					Next	set Save	Sav	e Retry (	Configuration	Cano	el

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.

Days	y Attempt Max Atte	Attornat - Disposition R	etry Type	
Want to save auto retry configuration.!	e • To Max	Attempt + Diater Dispos		
	Of Attempt	Set Minutes		
INSWERING MA	elect Attempt	Select Minute		
OK Cancel	Attempt	<ul> <li>5 Minutes</li> </ul>		
USTOMER HANGUP IN QUEUE	Select Attempt	✓ Select Minute	-	
	Select Attempt	✓ Select Minute	-	
EJECTED BY SWITCH	2 Attempt	✓ 15 Minutes	-	
INGING - NO ANSWER	3 Attempt	<ul> <li>10 Minutes</li> </ul>	-	
		Save Retry Configuration	on Cancel	
0. As we click on Ok button then a p	onun message sho	ws as follows.		
o. The effect of or outfoll then a p	spup message sno	us iono ws.		





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

S I							
	USER MODE PERMISSION						
	USER STATUS COLOUR						
	SMS CONFIG					× 0	
	EMAIL CONFIG	No. of Days	ttempt	Max Attempt	Disposition R	etry Type	
	BLACKLIST	Saved Successfully.	Attempt				
	EXTENSION DETAIL	1 AGENT BUS	st Attempt				
	USER	2 ANSWERING OK	at Attempt		Select Minute		
	DISDOSITION	4 CUSTOMER	Lococt Attempt				
	Disposition	5 NETWORK CONGESTION	Select Attempt		Select Minute		
		6 REJECTED BY SWITCH	2 Attempt		15 Minutes		
	CHAT GROUPS	7 RINGING - NO ANSWER	3 Attempt		10 Minutes		
	LEAD SOURCE						
	SKILL MASTER	Click on Ok button to save the char	iges				
	DEFAULT AUTO LOGIN						
	ACTIVITY						
	DATASET			set Save Sa	ve Retry Configuration	on Cancel	

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

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<b>*</b>	USER MODE PERMISSION								( <b>•</b> ) +		
	SMS CONFIG	"	Campaign	Source Type	Dialing Mode	Storage	Algorithm	Priority Time	Lead Generation Algo	Assign Policy	Dialing Pref
og j	EMAIL CONFIG	1	DEMO	MISSED ON IVR	CALLBACK	CALLBACK				AUTOMATIC	AUTO
	BLACKLIST	2	DEMO		AUTO	LEAD	EIEO	OFFTIME	DAILY		
	EXTENSION DETAIL	-	DEMO	MISSED ON ACD	AULO	LEAD	FIFO	OFFINE	DALT		
•	USER										
- 1	DISPOSITION										
	ZONE DIALING MAP										
2	CHAT GROUPS										
	LEAD SOURCE										
	SKILL MASTER										
	DEFAULT AUTO LOGIN										
	ACTIVITY										
	DATASET										
	DATASET CONFIG										
	MAP MOBILE DEVICE										
elete	e Lead Source (Le	ead)	<u>.</u>								
tep1:	Consider the step	s as	above	for opening	g Lead Sor	urce pag	ge				



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MENU MAPPING		_			_	φ <b>+</b>				
USER STATUS COLOUR										
USER MODE PERMISSION	CALLBACK				AUTOMATIC	AUTO	1	ADMIN	22 Apr 2020	
SMS CONFIG										
EMAIL CONFIG	LEAD	FIFO	OFFTIME	o you really want to delete the r	oplicy?			ADMIN	23 Apr. 2020	
BLACKLIST										
EXTENSION DETAIL				OK Canc	9					Loto icon
USER									Circk on De	iele icon
DISPOSITION										
ZONE DIALING MAP			Click	on Ok button to delete th	e lead source					
CHAT GROUPS										
LEAD SOURCE										
SKILL MASTER										
DEFAULT AUTO LOGIN										
ACTIVITY										
DATASET										
DATASET CONFIG										

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.

# Add New Skill:

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

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~	USER MODE PERMISSION	Mode Details	0 - 0%				
	SMS CONFIG	(0)	No Login				
8	EMAIL CONFIG						
	BLACKLIST	(0)	No Login				
	EXTENSION DETAIL	Mode Details	Agent Status	M Idle Status	Wrapup	Talk Status	
	USER	_			Status		
	DISPOSITION	0	0	00:00:00	00.00.00	00:00:00	
	ZONE DIALING MAP				00.00.00		
	CHAT GROUPS						
	LEAD SOURCE						
	SKILL MASTER						
	DEFAULT AUTO LOGIN						
	ACTIVITY	Clic	k on Skill Master sub menu				
	DATASET						
	DATASET CONFIG						
p2	: When Skill Mast	er page shows	then click on -	+ icon to open	"Create New S	kill" dialog box	



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*	USER MODE PERMISSION	
	SMS CONFIG	Name
- OC	EMAIL CONFIG	No Skill found.
en	BLACKLIST	
<b>L</b> *	EXTENSION DETAIL	Click on + icon to open "Create New Skill" dialog box
- 22	USER	
	DISPOSITION	
-	ZONE DIALING MAP	
<b>S</b>	CHAT GROUPS	
1.64	LEAD SOURCE	
	<ul> <li>SKILL MASTER</li> </ul>	
	DEFAULT AUTO LOGIN	
	ACTIVITY	
	DATASET	
	DATASET CONFIG	
	MAP MOBILE DEVICE	

Step3: Create New Skill dialog box shows as follows:

Create New Skill All form fields are required. Name	
Step4: Enter the skill name in name textbox then click on save button	
All form fields are required. Name English	
1. Enter the skill name 2. Click on Save button Save Cancel	
Step5: After click on save button then created skill shows on skill page	



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	USER MODE PERMISSION			¢ <b>•</b> +	
_	SMS CONFIG	Name			· · · · · · · · · · · · · · · · · · ·
-08	EMAIL CONFIG	English English			
<b>a</b> 10	BLACKLIST				
<u>ر</u> »	EXTENSION DETAIL				
=	USER				
	DISPOSITION				
-	ZONE DIALING MAP				
<i>~</i>	CHAT GROUPS				
1.4.4	LEAD SOURCE				
14111	<ul> <li>SKILL MASTER</li> </ul>				
	DEFAULT AUTO LOGIN				
	ACTIVITY				
	DATASET				
	DATASET CONFIG				
	MAP MOBILE DEVICE				

# **Delete Skill:**

Step1: Consider the steps as above for opening skill page

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





# 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

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*		USER STATUS COLOUR	Mode Details	0 🕶 📴				
		USER MODE PERMISSION	(0)	No Login				
~~		SMS CONFIG	Agent Status	0 - 0%				
Co		EMAIL CONFIG	(0)	No Login				
		BLACKLIST	Mode Details	<ul> <li>Agent Status</li> </ul>	dle Status	Wrapup Status	Talk Status	
		EXTENSION DETAIL	0	0	00:00:00	00:00:00	00.00.00	
		USER	0	0	00:00:00	00:00:00	00:00:00	
		DISPOSITION						
<b>2</b>		ZONE DIALING MAP						
Land		CHAT GROUPS						
		LEAD SOURCE						
		SKILL MASTER						
	-	DEFAULT AUTO LOGIN						
		ACTIVITY	Click on De	fault Auto Login sub menu				
		DATASET	L					
		DATASET CONFIG						

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

	USER STATUS COLOUR	User Id Demo (admin) Demo (admin)	Campaign © DEMO	Mode Auto
	SMS CONFIG	Rahul Singh (rahul)     Sohan (sohan)	$=$ $\langle$	Caliback Break
L	EMAIL CONFIG	<ul> <li>Rahul Singh (rahul1)</li> <li>Abhishek (abhishek)</li> </ul>		Progressive     Preview
	BLACKLIST	<ul> <li>Ashish (ashish)</li> <li>Ankur (ankur)</li> </ul>		
	EXTENSION DETAIL	Test (test)		
	USER	1.	2. Click on radio button of co	3. Click on radio button to select
	DISPOSITION	Click on radio button of userid to enable the mapped campaign for user	to enable the mode	the dialing mode for auto login
	ZONE DIALING MAP			
	CHAT GROUPS			
	LEAD SOURCE			
	SKILL MASTER			
	DEFAULT AUTO LOGIN			
	ACTIVITY			
	DATASET			
	DATASET CONFIG			
	MAP MOBILE DEVICE			

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)"





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*	USER STATUS COLOUR	Mode Details	0 🕶 🚥				
	USER MODE PERMISSION	(0)	No Login				
- Mo	SMS CONFIG	Agent Status	0 - 0%				
Co	EMAIL CONFIG	(0)	No Login				
	BLACKLIST	🐣 Mode Details	<ul> <li>Agent Status</li> </ul>	Idle Status	Wrapup Status	Talk Status	
	EXTENSION DETAIL	0	0	00.00.00	~~~~~~	00.00.00	
	USER	0	0	00:00:00	00:00:00	00:00:00	
	DISPOSITION						
<u> </u>	ZONE DIALING MAP						
Land	CHAT GROUPS						
	LEAD SOURCE						
	SKILL MASTER						
	DEFAULT AUTO LOGIN						
	ACTIVITY	Click on De	fault Auto Login sub menu				
	DATASET	-					
	DATASET CONFIG						

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

0	≡ SMART DIAL <sup>**</sup>	1/ Your Alerts 🕐 🛞 demo 🛩 📿 Search
		User Id Campaign Mode
		Demo (admin)     Demo (admin)     Demo (admin)     Demo (admin)     Aemove Mapping     Demo (admin)     Demo (admin)
• <b>6</b> 8	SMS CONFIG	Rahul Singh (rahu)     Galback
C <sup>®</sup>	EMAIL CONFIG	Abul Singh (abult)     Break     Dreak
	BLACKLIST	Ashish (ashish)
*	EXTENSION DETAIL	Test (lest)
	USER	
	DISPOSITION	Click on radio button of userid to enable to enable the mode
<u>~</u>	ZONE DIALING MAP	
Label .	CHAT GROUPS	Click on radio button of "Remove Mapping" to remove
	LEAD SOURCE	the derauit auto login permission from user
	SKILL MASTER	
	DEFAULT AUTO LOGIN	
	ACTIVITY	
	DATASET	
	DATASET CONFIG	
	MAP MOBILE DEVICE	
Sten	3. After that click a	on radio button of campaign to enable the mode
Step.	5. Ther that energy	in rule outlon of campaign to endote the node
~		
Step	4: Then click on ra	dio button of "Remove Mapping" to remove the permission from user
Ston	5. After mode upp	connect a new up massage shows as "De you want to remove the manning for VVVV" with Ok and
Step	5. After mode unit	happed, a pop up message shows as Do you want to remove the mapping for XXXX? with Ok and
Canc	el button	
cum	of outcom.	
0		🗄 Your Alerts 📵 🧑 demo - 📿 Q Search
~		Transition Constanting State
111		Control Contro Control Control Control Control Control Control Control Control Co
-06		© Kainai (camai)         © Auto           @ Rahai (camai)         © Manual
en)		Sohan (sohan)     Do you want to remove the mapping for rahul?     Bahul Singh (rahul1)     Do you want to remove the mapping for rahul?     Break
C	EMAIL CONFIG	Ablishex (abnishek)     Progressive     Progressive     Progressive
	BLACKLIST	Tankur (ankur)     Tosk (test)     OK Cancel
	EXTENSION DETAIL	
	DISPOSITION	
52	ZONE DIALING MAR	
Land	CHAT GROUPS	Click on Ok button to remove the mapping from user
1.000		
	SKILL MASTER	
	DATASET CONFIG	
	MAD MORILE DEVICE	
	MAP MOBILE DEVICE	
C,	7 1 1 1	
Step	b: As we click on (	JK button, a new popup message shows as "Default Campaign & Mode updated for XXXX (userid)"
1		





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.

# Add New Activity:

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



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*	USER STATUS COLOUR SMS CONFIG	Mode Details						
66	EMAIL CONFIG	Agent Status	0 - 0%					
<b>C</b> **	EXTENSION DETAIL	Mode Details	Agent Status	dle Status	🕐 Wrapup	Talk Status		
-	DISPOSITION	0	0	00:00:00	Status	00:00:00		
	ZONE DIALING MAP CHAT GROUPS				00.00.00			
Latel	LEAD SOURCE							
	DEFAULT AUTO LOGIN	Click O	"Activity" sub menu					
	DATASET							
	DATASET CONFIG							
Step2	: When Activity pa	age appears the	n click on + ico	n to open "Crea	ate New Activ	ity" dialog box		
0	≡ SMART DIAL <sup>™</sup>			5 Y	our Alerts 💿 🛛 😡	demo - Q Search		
*	SMS CONFIG		Name				*	
	BLACKLIST	No activity found.						
=	USER			Cli	ck on + icon to open "Cre	ate New Activity" dialog box		
	DISPOSITION ZONE DIALING MAP							
-	CHAT GROUPS							
Ltit	SKILL MASTER							
	ACTIVITY							
	DATASET DATASET CONFIG							
	MAP MOBILE DEVICE	100 H 100						
Sten	Create New Activ	vity dialog box	shows as follow					
Step	. create New Activ	any dialog box	shows as tonov	¥3.				
	aata Nour Activity							
	eate new Activity							
A	l form fields are red	quired.						
Na	ume							
E	mail							
	<u> </u>							
E	nter the Activity	name						
		C	lick on Save	button				
			2.					
			Save	Cancel				
Step4	Enter the Activity	v name in name	textbox then c	lick on save bu	tton			
Step5	: After click on say	ve button then a	reated activity	shows on activ	ty page			
pc					J F			



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*	USER STATUS COLOUR	0
100	USER MODE PERMISSION	Hame Anno Anno Anno Anno Anno Anno Anno Ann
- MO	SMS CONFIG	Emax
C.»	EMAIL CONFIG	
	BLACKLIST	
	EXTENSION DETAIL	
	USER	
	DISPOSITION	
<u></u>	ZONE DIALING MAP	
[abd	CHAT GROUPS	
	LEAD SOURCE	
	SKILL MASTER	
	DEFAULT AUTO LOGIN	
	<ul> <li>ACTIVITY</li> </ul>	
	DATASET	
	DATASET CONFIG	
	MAP MOBILE DEVICE	-

# **Delete Activity:**

Step1: Consider the steps as above for opening Activity page

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





## 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.

## Add New Dataset:

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





	×
Name	
Vodafone	
1.	
Enter the data	aset name
	lick on Save button
	Z. Save Cancel
Step4: Enter the datase	t name in name textbox then click on save button
Sups. And the old So	ave outon then created dataset shows on dataset page
Delete Dataset:	
	1 Comming Defendance
Step1: Consider the ste	ps as above for opening Dataset page
Step2: When Dataset p	age appears, click on delete icon to delete the dataset
	#     Dataset Hame     Action       1.     Vodsfore     Image: Comparison of the second
USER STATUS COLOUR SMS CONFIG EMAIL CONFIG	Ø Dataset Hame         Action           1.         Vodsfore
USER STATUS COLOUR           SMS CONFIG           C <sup>0</sup> EMAIL CONFIG           BLACKLIST           EXTENSION DETAIL	Dataset Name  Action
USER STATUS COLOUR           SMS CONFIG           SMS CONFIG           BLACKLIST           EXTENSION DETAIL           USER           DISPOSITION	Click on Delete icon to delete the dataset
USER STATUS COLOUR           SMS CONFIG           EMAIL CONFIG           BLACKLIST           USER STATUS           USER           DISPOSITION           ZONE DIALING MAP           CHAT GROUPS	Dataset Mane      Action      Vodefore      Click on Delete icon to delete the dataset
USER STATUS COLOUR     MAS CONFIG     EMAIL CONFIG     EMAIL CONFIG     ELACKLIST     LUSER     USER     DISPOSITION     ZONE DIALING MAP     LEAD SOURCE     ELAUS SOURCE     ELAUS SOURCE	
USER STATUS COLOUR       SMS CONFIG       SMS CONFIG       BLACKLIST       EXTENSION DETAIL       USER       DISPOSITION       ZONE DIALING MAP       Litt       CHAT GROUPS       SKILL MASTER       DEFAULT AUTO LOGIN	Click on Delete icon to delete the dataset
USER STATUS COLOUR       SMS CONFIG       SMS CONFIG       BLACKLIST       EXTENSION DETAIL       USER       DISPOSITION       ZONE DIALING MAP       LEAD SOURCE       SKILL MASTER       DEFAULT AUTO LOGIN       ACTIVITY       DATAGET	Click on Delete icon to delete the dataset
USER STATUS COLOUR       SMS CONFIG       EMAIL CONFIG       EMAIL CONFIG       BLACKLIST       EXTENSION DETAIL       USER       DIEPOSITION       ZONE DIALING MAP       CHAT GROUPS       EXALL MASTER       DATABET CONFIG       MATA DROBLE DEVICE	Dataset Name
USER STATUS COLOUR       SMS CONFIG       EMAL CONFIG       EMAL CONFIG       BLACKLIST       EXTENSION DETAIL       USER       DISPOSITION       ZONE DIALING MAP       CHAT GROUPS       LEAD SOURCE       SKILL MASTER       DEFAULT AUTO LOGIN       ACTIVITY       DATASET       DATASET CONFIG       MAP MOBILE DEVICE	
USER STATUS COLOUR       MS CONFIG       EMAIL CONFIG       EMAIL CONFIG       BLACKLIST       EXTENSION DETAIL       USER       DISPOSITION       CONE DIALING MAP       LAL       CHAT GROUPS       LEAD SOURCE       BEHAULT AUTO LOGIN       ACTIVITY       DATASET       DATASET CONFIG       MAP MOBILE DEVICE	
USER STATUS COLOUR     SMS CONFIG     SMS CONFIG     EXALL CONFIG     EACKLIST     EXTENSION DETAIL     USER     DISPOSITION     ZONE DIALING MAP     LEAD SOURCE     SKILL MASTER     DEFAULT AUTO LOGIN     ACTIVITY     DATABET     DATABET     DATABET     DATABET     DATABET     SKIEP3: After clicking th	• Volkfore         • Click on Delete icon to delete the dataset         • Click on Delete icon to delete the dataset         • on Delete icon to delete         • on Delete icon to delete      <
USER STATUS COLOUR       SMS CONFIG       EMAIL CONFIG       BLACKLIST       EXTENSION DETAIL       USER       DEPOSITION       ZONE DIALING MAP       CHAT GROUPS       LEAD SOURCE       SKILL MASTER       DEFAULT AUTO LOGIN       ACTIVITY       DATABET CONFIG       MAP MOBILE DEVICE       Step3: After clicking th	• Water         • Underforme         • Click on Delete icon to delete the dataset         • Click on Delete icon to delete the dataset         • Delete icon, a popup message asking a confirmation for delete
USER STATUS COLOUR       SMS CONFIG       EMAIL CONFIG       EMAIL CONFIG       ELACKLIST       EXTENSION DETAIL       USER       DIEPOSITION       ZONE DIALING MAP       CHAT GROUPS       LEAD SOURCE       SKILL MASTER       DEFAULT AUTO LOGINI       ACTIVITY       DATASET       DATASET       DATASET       DATASET CONFIG       MAP MOBILE DEVICE       Step3: After clicking th	Palanet Home
USER STATUS COLOUR       EMAIL CONFIG       EMAIL CONFIG       ELACKLIST       ELACKLIST       ODPOSITION       ZONE DIALING MAP       LAL       USER       ODPOSITION       ZONE DIALING MAP       LEAD SOURCE       SKILL MASTER       DEFAULT AUTO LOGIN       ACTIVITY       DATABET       DATABET CONFIG       MAP MOBILE DEVICE       Step3: After clicking th	New Yourstone       • Vocatione       • Click on Delete icon to delete the dataset   The delete icon, a popup message asking a confirmation for delete
USER STATUS COLOUR       BKS CONFIG       EMAIL CONFIG       BLACKLIST       EXTENSION DETAIL       USER       DISPOSITION       CONE DIALING MAP       LAD SOURCE       STATUS CONFIG       DEFAULT AUTO LODIN       ACTIVITY       DATABET       DATABET CONFIG       MAP MOBILE DEVICE	The delete icon, a popup message asking a confirmation for delete
COUSER STATUS COLOUR SMS CONFIG EMAIL CONFIG BLACKLIST EXTENSION DETAIL USER DEPOSITION ZONE DIALING MAP CHAT GROUPS LEAD SOURCE SKILL MASTER DEFAULT AUTO LOGIN ACTIVITY DATABET CONFIG MAP MOBILE DEVICE Step3: After clicking th	Water water is a confirmation for delete
USER STATUS COLOUR       SMS CONFIG       EMAL CONFIG       EMAL CONFIG       BLACKLIST       EXTENSION DETAIL       USER       DISPOSITION       ZONE DIALING MAP       CHAT GROUPS       LEAD SOURCE       SKILL MASTER       DEFAULT AUTO LOGIN       ACTIVITY       DATASET       DATASET       DATASET       DATASET       Step3: After clicking th	Weter wet
USER STATUS COLOUR       SMS CONFIG       EMAIL CONFIG       EMAIL CONFIG       ELACKLIST       EXTENSION DETAIL       USER       DISPOSITION       ZONE DIALING MAP       LAL       CHAT GROUPS       LEAD SOURCE       SKILL MASTER       DEFAULT AUTO LOGIN       ACTIVITY       DATAGET       DATAGET CONFIG       MAP MOBILE DEVICE       Step3: After clicking th	The delete icon, a popup message asking a confirmation for delete
USER STATUS COLOUR       SK SCAPIG       EMAL CONFIG       EMAL CONFIG       ELACKLIST       EXTENSION DETAIL       USER       DIPOSITION       ZONE DIALING MAP       LAL       CHAT GROUPS       LEAD SOURCE       SKILL MASTER       DEFAULT AUTO LOGIN       ACTIVITY       DATABET       DATABET CONFIG       MAP MOBILE DEVICE       Step3: After clicking th	te 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

SMART DIAL <sup>56</sup> 1 vour Alers 10       1								
IUSER STATUS COLOUR     Mode Details     1 - 100*       USER MODE PERMISSION     Mode Details     1 - 100*       Mode Details     Mode Details     1 - 100*       BLACKLIST     EXTENSION DETAIL     1 - 1 00:10:49     00:00:00     00:00:05       USER MODE STION     ZONE DIALNO MAP     I - 1 00:10:49     00:00:00     00:00:05       Int     LEAD SOURCE     Skill MASTER     Exact status     Exact status     Exact status       Int LEAD SOURCE     Skill MASTER     Click on Dataset Config sub menu     Click on Dataset Config sub menu     Exact status     Exact status	0	$\equiv$ SMART DIAL <sup>**</sup>				🕴 Your Alerts 🛛 🕕	🙆 demo 👻	
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SASE CONFIG       Agent Status       1 a most         C*       EMAIL CONFIG       1 a most         EMAIL CONFIG       Mode Details       * Agent Status         **       EACKLIST       Mode Details       * Agent Status         USER       Discostricion       1       1       00:10:49       00:00:00       00:00:05         **       Conta corours       Skill Amstein       Extension Details       Discostricion       Conta corours       Conta corours         Conta corourse       Skill Amstein       Click on Dataset Config sub menu         Dataset conFig       Dataset conFig       Click on Dataset Config sub menu       Click on Dataset Config sub menu		USER MODE PERMISSION	(1)	Auto				
C*       EMAIL CONFIG       C1       READY         Set Editation       BLACKLIST       Mode Details       Agent Status       <	-06	SMS CONFIG	Agent Status	1 🔺 100 %				
BLACKUST     Mode Details     Depart Status     B indic Status     B Wrapup Status     I Talk Status       USER     DISPOSITION     1     1     00:10:49     00:00:00     00:00:05       Intal Gas Source     Skill Master     Default Autor Login     Click on Dataset Config sub menu     Click on Dataset Config sub menu       Dataset Config     Dataset Config     Dataset Config     Dataset Config     Dataset Config	C	EMAIL CONFIG	(1)	READY				
ExtEnsion DETAIL USER DISPOSITION ZONE DILING MAP CHAT GROUPS Lint DEFAULT AUTO LOGIN DEFAULT AUTO LOGIN DATASET DATASET CONFIG		BLACKLIST	Mode Details	Agent Status	Idle Status	Wrapup Status	Talk Status	
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Disposition         Zone Dataling Map         Ladi         LeAD SOURCE         Skill Master         Skill Master         Default Not Colon         Activity         Dataset Config sub menu         Dataset Config         Dataset Config		USER	1	1	00:10:49	00:00:00	00:00:05	
ZONE DIALING MAP       Lind       CHAT GROUPS       LEAD SOURCE       SKILL MASTER       DEFAULT AUTO LOGIN       ACTIVITY       DATASET       B DATASET CONFIG		DISPOSITION						
Lifi CHAT GROUPS LEAD SOURCE SUBJECT CONFIG CICK on Dataset Config sub menu Dataset Dataset Config sub menu Dataset Config sub menu Dataset Config sub menu		ZONE DIALING MAP						
LEAD SOURCE SKILL MASTER DEFAUIT AUTO LOGIN ACTIVITY DATASET	Land .	CHAT GROUPS						
SKILL MASTER       DEFAULT AUTO LOGIN       ACTIVITY       DATASET       • DATASET CONFIG		LEAD SOURCE						
DEFAULT AUTO LOGIN     Click on Dataset Config sub menu       ACTIVITY     Click on Dataset Config sub menu       DATASET     DATASET CONFIG		SKILL MASTER						
ACTIVITY Click of Dataset Coning sub finenu DATASET • DATASET CONFIG		DEFAULT AUTO LOGIN	Olisticas	Detect Conference				
DATASET     DATASET CONFIG		ACTIVITY	Click on	Dataset Coning sub menu				
DATASET CONFIG		DATASET						
		DATASET CONFIG						
			-					

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



0		🖩 Your Alerts 💿 😡 demo 🖛 🔍 Search	
*	USER STATUS COLOUR	Dataset VODAFONE	
68	USER MODE PERMISSION SMS CONFIG		
¢۵	EMAIL CONFIG	1. 2. Click on View icon to shows the dataset field	
	EXTENSION DETAIL		
	USER	Click on + icon to open "Create New Field Caption" dialog box	
	DISPOSITION		
Land	CHAT GROUPS		
	LEAD SOURCE		
	DEFAULT AUTO LOGIN		
	ACTIVITY		
	MAP MOBILE DEVICE		
Step	Create New All form field Name Type Text Parent Select Text Len 20	Field Caption   ds are required.   scription ogth Save Cancel iate data as shown in below picture	





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

	■ SMART DIAL <sup>™</sup>					🐐 Your Alerts 🛛 🕕	😡 demo 👻	Q Search
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e	USER MODE PERMISSION	- 0	Caption	Туре	Details	Parent Name	Position	Parent
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	BLACKLIST	- × L	_Name	Text	40		2	
	EXTENSION DETAIL	• • •	008	Date			3	
	DISPOSITION							
2	ZONE DIALING MAP							
4	CHAT GROUPS							
	LEAD SOURCE							
	SKILL MASTER							
	ACTIVITY							
	DATASET	4						
	DATASET CONFIG							
	MAP MOBILE DEVICE							


	$\equiv$ SMART DIAL <sup>**</sup>											
8	USER STATUS COLOUR	Dataset		VODAFONE	•	-			+			
	USER MODE PERMISSION							-		-		
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	EMAIL CONFIG	• × F_	Name	Text	ь	0		1				
	BLACKLIST	• × L	Name	lext	4	0		2				
-	EXTENSION DETAIL		ЭВ	Date				3				
1	USER	$\sim$										
	DISPOSITION		$\backslash$									
	ZONE DIALING MAP	Click on e	cross "x" icon	to delete the datase	et field							
1	CHAT GROUPS											
	LEAD SOURCE											
	SKILL MASTER											
	DEFAULT AUTO LOGIN											
	ACTIVITY				_				_	_		
	DATASET											
	DATASET CONFIG											
p4	After clicking t	he delete	icon, a	popup mess	sage askin	g a confirr	nation for de	elete				
ep4	After clicking t	he delete	icon, a	popup mess	sage askin	g a confirr	nation for de	elete	O Searc	h	1	
p4	After clicking t	he delete	icon, a	popup mess	sage askin	g a confirm	nation for de	elete	Q Searc	h		
p4	SMART DIAL* USER STATUS COLOUR	he delete	icon, a	popup mess	sage askin	g a confirm	nation for de	elete	Q Searc	h		
p4	SMART DIAL SMART DIAL USER STATUS COLOUR USER MODE PERMISSION	he delete	icon, a	popup mess	sage askin	g a confirm	nation for de	elete	Q Searc	h		
p4	AAP MOBILE DEVICE  After clicking t  SMART DIAL**  USER STATUS COLOUR  USER MODE PERMISSION  SMS CONFIG	be delete	icon, a	VODAFONE	sage askin	g a confirm	Your Alerts     Parent Name	elete @ deno ~	Q Searc	h		
ep4	AAP MOBILE DEVICE  After clicking t  SMART DIAL <sup>**</sup> USER STATUS COLOUR USER MODE PERMISSION SMS CONFIG EMALL CONFIG EMALL CONFIG		icon, a	VODAFONE Type Type Delete caption?	sage askin	g a confirm	* Your Alerts       Parent Name	elete elete deno + Proston 1 2	Q Searce	h Parent		
p4	AAP MOBILE DEVICE  After clicking th  SMART DIAL <sup>**</sup> USER STATUS COLOUR  USER MODE PERMISSION  SMS CONFIG  EMAIL CONFIG  BLACKLIST	be delete	icon, a	VODAFONE	sage askin	g a confirm	A Your Alerts	elete elete emo + Presser 1 2 3	Q Searc	Parant		
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p4	SMART DIAL*      SMART DIAL*      USER STATUS COLOUR      USER MODE PERMISSION      SMS CONFIG      EMAIL CONFIG      EMAIL CONFIG      ELACKLIST      EXTENSION DETAIL      USER      DISPOSITION		icon, a	DODAFONE	sage askin	g a confirm	Your Alerts     Parent Name	elete elete deno + Peseton 1 2 3	Q Searc	Parent		
pp4	AMAP MOBILE DEVICE  After clicking t  SMART DIAL*  USER STATUS COLOUR  USER MODE PERMISSION  SMS CONFIG  EMAIL CONFIG  BLACKLIST  EXTENSION DETAIL  USER  DISPOSITION  ZONE DIALING MAP		icon, a	VODAFONE	sage askin	g a confirm	Your Alerts     Parent Name	elete elete demo + Postlom 1 2 3	Q Searc	Parent		
2p4	AMP MOBILE DEVICE  After clicking ti  SMACT DIAL*  USER STATUS COLOUR  USER MODE PERMISSION  SMS CONFIG  ELACKUST  EXTENSION DETAIL  USER  DISPOSITION  ZONE DIALING MAP  CHAT GROUPS	he delete	icon, a	VODAFONE Type Delete caption? Note: Dateling Paren	sage askin	g a confirm	Nation for de	elete employee Personal 2 3	Searce	Parent		
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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

0	≡ SMART DIAL <sup>**</sup>				🖗 Your Alerts 🛛 🕕	🙆 demo 👻	Q Search
*	DID MANAGEMENT		1 - 100 %				
08	VOICE FILE		1 - 100 %				
C	DID SMS MAP	(1)	READY				
*	HOLIDAY	Mode Details	Agent Status	Idle Status	Wrapup Status	Talk Status	
-		1	1	02:01:26	00:00:00	00:00:06	
		Click on DID M	fanagement sub menu				
htt							

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

0	≡ SMART DIAL*				🕴 Your Alerts 🛛 💿	🔕 demo 👻	Q Search	
		Communication:	VOIP	• View		0		
-	IVR DESIGN							
06	VOICE FILE			. /	2			
C.»	DID SMS MAP		Select the VOIP fro	m Communication Ial	bel			
-	HOLIDAY		(It shows according	to client type)				
<b>2</b>								
land								
Step?	3: After clicking or	n View but	ton. DID sho	ws on DID	Management Page			
	Ŭ		,	no on Did	in and goment i age			
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			,		* Your Alerts	lema 💌	Q Search	
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@ *	SMART DIAL**	Communication:		View	Your Alerts ()	@ demo マ	Q Search	l
(i) (i) (i) (i) (i) (i) (i) (i) (i) (i)	SMART DIAL**  DID MANAGEMENT  IVR DESIGN	Communication: # VOIP Alias 1. vodafone	VOIP VOIP IP 10.229.9.236	View     DID/TFN     01171600800	<pre>% Your Alerts ④ Campaign DEMO</pre>	œ demo マ Music On Hold □	Q Search SCHEDULE SCHEDULE	l
ی چ چ	SMART DIAL <sup>**</sup> DID MANAGEMENT     VOR DESIGN     VORCE FILE     DID MANAGEMENT	Communication: // VOIP Alias 1. vodafone 2. vodafone	VOIP VOIP IP 10.229.9.236 10.229.9.236	View     DID/TFN     01171600801     01171600801     01171600801	<pre>% Your Alerts ④ % Your Alerts ④ Campaign DEMO DEMO DEMO </pre>	Music On Hold	Q Search SCHEDULE SCHEDULE SCHEDULE	
ان چ چ ب	SMART DIAL <sup>**</sup> DID MANAGEMENT     IVR DESIGN     VOICE FILE     DID SMS MAP     HOLIGAY	Communication: VOIP Alias 1. vodafone 2. vodafone 3. vodafone	VOIP VOIP IP 10.229.9.236 10.229.9.236 10.229.9.236	View     DID/TFN     01171600800     01171600801     01171600802	Your Alerts     O	Gemo ▼ Music On Hold □ □ □	Q Search SCHEDULE SCHEDULE SCHEDULE SCHEDULE	
(i)	SMART DIAL <sup>**</sup> DID MANAGEMENT      IVR DESIGN      VOICE FILE      DID SMS MAP      Hollday	Communication: VOIP Alias 1. vodafone 2. vodafone 3. vodafone	VOIP VOIP IP 10.229.9.236 10.229.9.236 10.229.9.236	View 01/776 01171600801 01171600801 01171600802	Your Alerts     O	Auste On Hold	Q Search SCHEDULE SCHEDULE SCHEDULE SCHEDULE	
(2) * * 3	SMART DIAL <sup>**</sup> DID MANAGEMENT      IVR DESIGN      VOICE FILE      DID SMS MAP      Holiday	Communication: VOIP Alias 1. vodafone 2. vodafone 3. vodafone	VOIP VOIP IP 10.229.9.236 10.229.9.236 10.229.9.236	View DID/TFN 01171600801 01171600801 01171600802	Your Alerts     OEMO     DEMO     DEMOLOCAL	Auste On Hold	Q Search SCHEDULE SCHEDULE SCHEDULE SCHEDULE	
8 1 H 3 8 8	SMART DIAL <sup>**</sup> DID MANAGEMENT      VR DESIGN      VOICE FILE      DID SMS MAP      HOLIDAY	Communication: VOIP Alias 1. vodafone 2. vodafone 3. vodafone	VOIP VOIP IP 10.229.9.236 10.229.9.236 10.229.9.236	View     Dio/TFN     01171600801     01171600802     S	Your Alerts     Your Alerts     OFMO     DEMO     DEMOLOCAL	Auste On Hold	C Scerch SCHEDULE SCHEDULE SCHEDULE SCHEDULE SCHEDULE	
E 6 1 11 3 3	SMART DIAL <sup>**</sup> DID MANAGEMENT      VR DESIGN      VOICE FILE      DID SMS MAP      HOLIDAY	Communication: VOIP Alias 1. vodafone 2. vodafone 3. vodafone	VOIP VOIP IP 10.229.9.236 10.229.9.236 10.229.9.236	View DID/TFN 01171600801 01171600802	Your Alerts     Your Alerts	demo     demo	C Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule	
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	SMART DIAL <sup>**</sup> DID MANAGEMENT      IVR DESIGN      VOICE FILE      DID SMS MAP      HOLIDAY	Communication: VOIP Alias 1. vodafone 2. vodafone 3. vodafone	VOIP VOIP IP 10.229.9.236 10.229.9.236 10.229.9.236	View     ID/TFN     01/7760800     01171600801     01171600802     S	Your Alerts	demo     demo	C Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule Schiedule	
	SMART DIAL <sup>39</sup> DID MANAGEMENT     VYD DESION     VOICE FILE     DID SMS MAP     HOLIDAY	Communication: VOIP Alias 1. vodafone 2. vodafone 3. vodafone	VOIP VOIP IP 10.229.9.236 10.229.9.236 10.229.9.236	View     Di0/TFN     01171600801     01171600802     S	Your Alerts	demo     demo	SCHEDULE SCHEDULE SCHEDULE SCHEDULE SCHEDULE	
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E 13 1 1 3 2 3 3 5	SMART DIAL <sup>39</sup> DID MANAGEMENT     VYD DESION     VOICE FILE     DID SMS MAP     HOLIDAY	Communication: VOIP Alias 1. vodafone 2. vodafone 3. vodafone	VOJP VOJP IP 10.229.9.236 10.229.9.236 10.229.9.236	<ul> <li>View</li> <li>DID/TEN</li> <li>01171600801</li> <li>01171600802</li> <li>Smrth</li> </ul>	Your Alerts ●     Your Alerts ●     Campaign     DEMO     DEMO     DEMOLOCAL     .      letect the campaign name for     happing DID to campaign	demo     demo	SCHEDULE SCHEDULE SCHEDULE SCHEDULE SCHEDULE	
E 13 1 1 3 3 3 3	SMART DIAL <sup>30</sup> DID MANAGEMENT     IVR DESIGN     VOICE FILE     DID SMS MAP     HOLIDAY	Communication: VolP Alias 1. vodafone 2. vodafone 3. vodafone	VOJP VOJP IP 10.229.9.236 10.229.9.236 10.229.9.236	View 0177600800 01171600801 01171600802 Sr	Your Alerts      Your Alerts     Your Alerts	demo     demo	C SCHEDULE SCHEDULE SCHEDULE SCHEDULE SCHEDULE	
E & 1 # 3 & 9	SMART DIAL <sup>30</sup> DID MANAGEMENT     IVR DESIGN     VOICE FILE     DID SMS MAP     HOLIDAY	Communication: / VolP Alias 1. vodafone 2. vodafone 3. vodafone	VOIP VOIP IP 10.229.9.236 10.229.9.236 10.229.9.236	View 0177600800 01171600802 01171600802 Sr	Your Alerts      Your Alerts     Your Alerts	Music On Hold       Image: Constraint of the second se	C Schedule S	



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

VOIP FORWARD			×
DID Number*	01171600802	Schedule*	24X7 🔻
Type *	Campaign 🗸		
Prompt	Please Select 🔹	_	
Campaign*	DEMO 🔹		Select the option as 24x7
Queue Max time*	300	Select the type as camp	paign or
Forward Type*	Hangup 👻	other options as require	ed
	Save	Select the voice file fr	om prompt option
		Select the campaig	n name from campaign option
Click on Save I	button to save the configuration	Enter the maximum t	type of call in queue
		Select the forward typ	e
tep6: Fill up the appr	opriate setting for the DID as s	hown in above picture	255306

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



<u> </u>	≡ SMART DIAL**				∛ Your Alerts	💿 🛞 demo -	Q Search	
	DID MANAGEMENT	Mode Details (1)	1 - 100 % Manual					
<b>C</b> <sup>®</sup>	VOICE FILE DID SMS MAP	Agent Status (1)	READY	APA Idla Statur	A Wrapup Status	Talk Status		
=	HOLIDAY	1	1	00:31:44	00:00:00	00:00:00		
		Click	on Voice File sub menu					
Late								
Step2.	First tick the	checkbox ar	nd click on OK but	on to select the	campaign			
Step=.	1 1100 01011 0110	•••••••••••			••••••p••·B···			
<b>@</b> =	≡ SMART DIAL <sup>™</sup>	Campaign Name	Salart Campaign	•	🖗 Your Alerts	💿 🔘 demo ~	Q Search	
<b>~</b>	DID MANAGEMENT		Select All	3				
<b>c</b> »	DID SMS MAP HOLIDAY		DEMOLOCAL     IPRUAB     SITICABLE	Click on View icon to	show the data for selected o	ampaign		
		1.	OK Cancel					
<b>S</b>		TICK ON CHECKDOX	2.					
			Click on C	k button				
	6 A A	1000						
Step3:	After clicking	g on View ic	on, Voice file show	vs as follows:				
	Service .	A.						
		Campaign Name	DEMO 👻 🕨	· · · ·	∛ Your Alerts	💿 💿 demo 👻	Q Search	
	VOICE FILE	# Campaign Nat 1. DEMO	me File name 11112amanda.wav	Duration 00:00:31	File Description		Action	
€° □ ≡ "	DID SMS MAP HOLIDAY							
-				Click on + icon to u	pload the voice file			
Step4:	Then click on	+ icon to o	pen the "New Voic	e File" dialog b	oox as follows:			



NEW VOICE FILE		×
Voice file: File Description:	Browse No file selected.	
	Cancel Upload	

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

NEW VOICE FILE	×	
Voice file: File Description:	Browse Sleep.wav	
	Cancel Upload 2. Enter the file description	
Uploading! Uploading done!	3. Click on Upload button	
Step7: As we click or	n upload button, then it gives the response as "Uploading done!" in dialog box	
Step8: The recently u	ploaded file shown as follows:	
Zir of the recently u		
	Compaign Name     DEMO     The name     Demo     Demo     The name     Demo	
SMART DIAL <sup>®</sup> DID MANAGEMENT     NO DEBUN     VOICE FILE     OID SMS MAP     HOLDBAY	Campaign Name DEMO Campaign Name DEMO Campaign Name Demote Duration File Description Action 1. DEMO 11112amanda.wav 00:00:31 2. DEMO 11112aisep.wav 00:00:09 test Deventoad	
SMART DIAL <sup>®</sup> DIO MANAGEMENT     IND DEBIDIN     VOICE FILE     OID SMS MAP     HOLIDAY	Campaign Name DEMO	
SMART DIAL*	Producted line showin as follows.       Propriate DEMO       Campaign Name     File name       Ourration     File Description       Action       DEMO     Intil Zamanda.wav       00:00:09     test	
SMART DIAL*	Compaign Name DEMO  Cempaign Name DEMO Cempaign Name DEMO Cempaign Name Pile name Dreation Cempaign Name Pile name Original  Demo Cempaign Name DEMO Cempaign Name Cempaign Name Original Cempaign Name Cempaign Name Original Cempaign Name Cempaign Name Original Cempaign Name O	
SMART DIAL <sup>®</sup> DIO MANAGEMENT     MIN DEBION     VOICE FILE     OIO SMS MAP     HOUDAY	Impaign Name     DEMO     Impaign Name     Impaign Name     Impaign Name     Impaign Name     Impaign Name     Action       1     DEMO     Ithit2amanda.wav     00:00:09     test     Impaign Name     Download	
SMART DIAL	Impedance incession incession	



Step2: When voice file shows then click on Delete icon to delete the voice file SMART DIA 11112aman 11112sleep. 00:00:31 DEMO DID SMS MA Click on Delete icon to delete the voice file Step3: After clicking the delete icon, a popup message asking a confirmation for delete Are you sure want to delete it!. OK Cancel Click on Ok button 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 SMART DIA 0 0 - 0% Section Mode Detail Talk Status Idle Status 1 Wrapup Status 00:00:00 0 0 00:00:00 00:00:00 Click on DID SMS Map sub menu



# Step2: DID SMS Map page appears as follows:

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

0	≡ SMART DIAL**					🕈 Your Alerts _ 🕕	l 🛞 den	ю ~	Q Search		
	_	# DID	Туре	Event	Resend	Duration(in Hrs)	Template	Rot	ite		
	DID MANAGEMENT	01171600803	ABANDON	<ul> <li>IVROFF</li> </ul>	✓ 2		TEST	- TI	STING	-	~
	IVR DESIGN										
	VOICE FILE										
	DID SMS MAP										
	HOLIDAY										

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

	DID MANAGEMENT IVR DESIGN VOICE FILE	Mode Details (0) Agent Status (0)	O → 0% No Login O → 0%				
	HOLIDAY	📥 Mode Details	Agent Status	Idle Status	Wrapup Status	Talk Status	
l		0	0	00:00:00	00:00:00	00:00:00	
		Click on Holic	lay Sub menu				
2	: When Holida	v nage anne	ars, then click on N	Jew Holiday L	ist icon as shown	n in picture	



SMART DIAL <sup>™</sup>	1/ Your Alerts 🕐 demo 🛩 📿 Search
DID MANAGEMENT	* * * * * * * * * * * * * * * * * * *
VOICE FILE	P1.         Default         2020-03-27 14:00:10         1111hope_corona.way         00:00:30         III           71         2020-02 37         Corona Helday:         2020-02 37 13:00:28         0000-00:00:00         1111hope_corona.way         00:00:30         III
C <sup>(*)</sup> DID SMS MAP	
E HOLIDAT	
	Click on this icon to add new holiday list
Sal Lot	
Step3: New Holiday	List page appears as follows:
New Holiday List	X
Holiday Date	2020-04-27
Holiday Name	Independence Day
	Select the date
SAVE RESET	
	Enter the Holiday name
Click or	n Save button
and the second sec	
Step4: Select the dat	e from Holiday Date calendar option and enter the name in Holiday Name as it shown in above picture
1007	
Sten5: At last click o	on Save button to save the data
Step5. At last eller c	in Save Sutton to save the data.
Add Voice file fo	r holiday list
Step1: Consider the	steps as above for opening holiday page, then click on "upload voice file" icon
SMART DIAL <sup>**</sup>	4 Your Alerts 👩 😡 demo 🛩 Q. Search
<b>*</b>	++ ^ D
IVR DESIGN	#         Holiday Date         Holiday Date         Upload Date Time         Update Date Time         Voice File         File Duration         Action           f1         Default         2020.02.27.44/00/10         11111000_000000.00         Image: Control of Contro of Control of Control of Contro of C
VOICE FILE	#1.         Default         2020-03-27 14:00:10         In Infoge_corona.wav         00:00:30         Image           #2.         2020-03-27         Corona Holl day         2020-03-27 13:00:29         2020-04-27 10:57:57         1111hope_corona.wav         00:00:30         Image: Corona Holl day         Image: Corona Holl day         Image: Corona Holl day         00:00:30         Image: Corona Holl day         Image: Corona Holl day         Image: Corona Holl day         00:00:30         Image: Corona Holl day         Ima
DID SMS MAP	#3. 2020-04-27 Independence Day 2020-04-27 13:28:58 0000-00-00 00:00:00 1111hope_corona.way 00:00:30 🖌 🛢
	Click on this is con to upload the
S	
Last.	
G4 2. (TT 1' 1 1' 4	$X_{1} = \Gamma^{1}_{1} \cdot 2^{2} \cdot 1^{2}_{1} \cdot $
Step2: "Holiday list	voice File dialog box appears as follows:



Holiday List Voice File	
Holiday List: Default	
Voice File: Browse No file selected.	
Cancel Upload	
Step3: Select the Holiday list and Voice file as shown in picture	
Holiday List Voice File	
Holiday List 2020-04-27/Independen	
Voice File: Browse Sleep way	
Cancel Upload Select the Holiday list	
2.	
Select the voice file by clicking 3.	
on Browse button Click on Upload button to save the selected data	
Save the selected data	
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	
SMART DIAL**	
ID         DID         MANAGEMENT         //         Holiday Date         Uploed Date         Uploed Date         Uploed Date         Uploed Date         Time         Update         Uploed Date         Up	
VOICE FILE         #2.         2020-03-27         Corona Holiday         2020-03-27 13:00:29         2020-04-27 10:57:57         1111hope_corona.wav         00:00:30         Image: Corona Holiday           DID SMS MAP         #3.         2020-04-27         Independence Day         2020-04-27 13:28:58         0000-00-00 00:00:00         1111sleep wav         00:00:09         Image: Corona Holiday         Image: Corona Holiday	
Click on this icon to import the holiday list	
Step2: Import holiday list page shows 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

0	≡ SMART DIAL <sup>**</sup>						🕆 Your Alerts 📧	🔊 demo 👻	Q Search
-								+ ^ 0	
	IVR DESIGN	#1.		Default	2020-03-27 14:00:10		1111hope_corona.wav	00:00:30	
	VOICE FILE	#2.	2020-03-27	Corona Holiday	2020-03-27 13:00:29	2020-04-27 10:57:57	1111hope_corona.wav	00:00:30	<ul> <li>Image: A set of the set of the</li></ul>
	DID SMS MAP	#3.	2020-04-27	Independence (		0-00-00 00:00:00	1111sleep.wav	00:00:09	
	HOLIDAY				Are you sure want to delete it!.				
					, OK Cancel	1			
			C	lick on Ok button					
	100 Dec 100								

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:

#### Create a New Campaign

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

		6			S. Maria Alasta		C Danarah
0) **	CAMPAIGN MANAGEMENT     Campaign     Compaign     Compaign	Mode Details (0)	O ← osc No Login		7 Your Alerts	erno v	Q search
<b>c</b> ®	Campaign Queue     Mapping     Gampaign Transfer manning	(O)	No Login	🚳 Idle Status	Wrapup Status	Talk Status	
	Callback - Re schedule     Email Template     SMS Template	0 Click on Ca	0 Impaign sub-sub menu	00:00:00	00:00:00	00:00:00	
Lui	Orlie Category     Music On Hold     User Mapping to DID     SMS Disp Mapping						
	LEAD MANAGEMENT • Import Lead • Assign Lead						
	CRM Data     Callback Assign						
	OTHER MANAGEMENT  • Free Agent • Email Inbox	* [			"		

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

9							7 Your	Alerts 😶	0	demo ~	Q Search
*	CAMPAIGN MANAGEMENT							•	• +		
	• Campaign	"							AMP		
	Campaign Queue		(296) IPRUAB	IPRU AB		A (0) / M (10)			6		• • • •
	• Mapping	100	(402) DEMOLOCAL	Demo Loca Type Channel		A (0) / M (10)			/ m		
	• Campaign Transfer mapping		(439) SITINETWORK	Siti Network		A (0) / M (10)					
	Caliback - Re schedule     Email Template	-	(524) SITICABLE	NA		A (0) / M (10)	(****)	-		<b>[</b> ]]	
	SMS Template		(994) <u>DEMO</u>	demo campaign		A (7) / M (3)	<b>V</b>	ø		<b>V</b>	
	Music On Hold										
	o User Mapping to DID						/				
	SMS Disp Mapping				Click or	1 + icon to open	"Create N	New Cam	paign" di	alog box	
	LEAD MANAGEMENT										
	• Assign Lead										
	<ul> <li>Lead Manager</li> </ul>										
	CRM Data										
	Callback Assign										
	OTHER MANAGEMENT										
	e Email Inbox										



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Campaign Rearry feet the campaign description campaign theory fuet is Select the campaign type as OB/B/B/AB/SB/SD/SR outhound of campaign Timeout (II seconds) I campaign type is OB/B/L then enter the time for campaign queue Lineout 4 Campaign Timeout (II seconds) I campaign type is OB/B/L then enter the time for campaign queue Lineout 4 Campaign Timeout (II seconds) I campaign type is OB/B/L then enter the time for campaign queue Lineout 4 Campaign Timeout (II seconds) I campaign type is OB/B/L then enter the time for campaign queue Lineout 5 Tables Select The seconds I campaign type is OB/B/L then enter the time for campaign Files Select 5 Tables Select	All form fields are required.
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campaign peorption Campaign Type* Campaign Type* Campaign Type* Campaign Type* Select the channel type as SIP for the VOIP Client Pieas Select Campaign Type* Select the channel type as SIP for the VOIP Client Pieas Select Campaign Type* Select the channel type as SIP for the VOIP Client Pieas Select Select the channel type as SIP for the VOIP Client Pieas Select Select the dataset name, if same dataset required in multiple campaign Pieas Select Select the dataset name, if same dataset required in multiple campaign Pieas Select Campaign Tymes* Pieas Select Select the dataset name, if same dataset required in multiple campaign Pieas Select Select Select the dataset name, if same dataset required in multiple campaign Pieas Select Select Select the dataset name, if same dataset required in multiple campaign Pieas Select Select Select the dataset name, if same dataset required in multiple campaign Pieas Select Select Select the dataset name, if same dataset required in multiple campaign Pieas Select S	
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channel type* Select the channel type as SIP for the VOIP Client  Please Select Please Select Atto Dia Channels If group type selected then set the Auto and manual channels So type of the dataset name, if same dataset required in multiple campaign Please Select set Campaign Nume* tests Campaign Nume* tests Campaign Nume* (is econds)  So the of the dataset name, if same dataset required in multiple campaign Outbound If group type selected the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset required in multiple campaign Please Select  So the of the dataset name, if same dataset name, if same dataset nequired in multiple campaign Please Select  So the of the dataset name, if same dataset nequired in multiple campaign Pleas	OB Campaign Timeout*(in seconds) If Campaign type is OB/BL then enter the time for campaign queue timeout
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<pre>Please select And Dial Channels</pre>	Group Type* Select the Group type, if it's PRI Client
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Bataset Select the dataset name, if same dataset required in multiple campaign Please Select seve Cancel	Please Select Select the strategy
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save Cancel	Please Select
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ep4: Fill up the appropriate data as follows: Create New Campaign All form fields are required. Campaign Name* test Campaign Description testing Campaign Type* Outbound OB Campaign Type* Outbound OB Campaign Type* VOIP Server Priority Prefix Auto(%) Auto(DU)  I I I I I I I I I I I I I I I I I I I	Save
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SIP # VOIP Server Priority Prefix Auto(%) Auto(DID) Manual(%) Manual(DID) V vodafone 1 • 0 • 01171600800 0 • 01171600801 Strategy* rrmemory • Dataset Please Select • Save Cancel	Channel Type*
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vodafone 1   1 0   01171600800   01171600802   01171600802   Strategy*    Strategy Cancel	# VOIP Server Priority Prefix Auto(%) Auto(DID) Manual(%) Manual(DID)
Strategy* rrmemory Dataset Please Select Save Cancel	vodafone         1         0         0         01171600800 01171600801         0         0         01171600800 01171600801         0         0         01171600801         0         0         01171600801         0         0         01171600801         0         0         0         0         0         01171600801         0
rrmemory Dataset Please Select  T  Cancel	Strategy*
Dataset Please Select	rrmemory 🔹
Please Select	Dataset
Save Cancel	Please Select
Save Cancel	*
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	Save Calicet



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

## <u>Edit Campaign</u>

Step1: Consider the steps as above for opening Campaign page

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*	CAMPAIGN MANAGEMENT					( ¢ ) ( •	+	
68	• Campaign							Action
	CRM Configuration     Campaign Queue	(296) <u>IPRUAB</u>	IPRU AB	A (0) / M (10)				
	• Mapping	(402) DEMOLOCAL	Demo Loca Type Channel	A (0) / M (10)		[[]]]]	<b>v</b>	• • • •
	Campaign Transfer mapping     Callback Deschortule	(439) SITINETWORK	Siti Network	A (0) / M (10)				• • • •
	• Email Template	(524) SITICABLE	NA	A (0) / M (10)		[[[[[]]]]]		• • • •
	SMS Template	(994) <u>DEMO</u>	demo campaign	A (7) / M (3)				• • • •
	File Category     User Mapping to DID     Music On Hold     SMS Disp Mapping					C th	lick on this ico e campaign s	n to edit etting

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

Campaign Edit	×	
Campaign Name*	DEMO	
Campaign Description	demo campaign	
Campaign Type*	Blended	
OB Campaign Timeout*(in seconds)	45	
Channel Type*	SIP	
# VOIP Server Priority Prefix Auto(%) Auto(DID)	Manual(%) Manual(DID) Dynamic(DID)	
✓         vodafone         1         ▼         70         ▼         01171600802 011741600802	30 ▼ 01171600800 0 Digit ▼ ≡	
Strategy*		
rrordered	•	
Dataset Edit the campaign setting as required	-	
Script Path	-	
Prefix		
	Click on Update button	
	Update	

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



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		CAMPAIGN MANAGEMENT				Ø	•	]		
		• Campaign							Mobile Agent	Action
		Campaign Queue	(296) IPRUAB	IPRU AB	A(0) / M(10)					
		• Mapping	(402) DEMOLOCAL	Demo Loca Type Channel	A (0) / M (10)					
		Campaign Transfer mapping     Callback - Re schedule	(439) SITINETWORK	Siti Network	A(0) / M(10)					
-		o Email Template	(524) SITICABLE	NA	A (0) / M (10)					
P		SMS Template     File Category	(994) <u>DEMO</u>	demo campaign	A(7) / M(3)					
.til		• User Mapping to DID								
		• Music On Hold					Clic	k on this ic	con to open the	
		<ul> <li>SMS Disp Mapping</li> </ul>					SCI	equiel ula	og box	

Step2: Then click on <sup>9</sup> (scheduler) icon to open the scheduler dialog box as shown in above picture

										1
Start Time	End Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	× 1	
00:00	23:59				V			V		
1.				2.						
Set the ca and End	ampaign St Time	tart T	ick on che	ckboxes to	select th	e Clic	k on Sche	edule bu	tton	
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Ston 2. Sat	h	au ataut	م ال مع ال							
Step3: Set 1	ne campai	gn start	and end t	ime						
Sten/. The	tick on c	heckbox	es to sele	et the wor	kina dav	s for the	a campaio	n		
Step4. The		IICCKUUA			King uay	5 101 110	campaig	,11		
Sten5: Afte	r clicking	on Sche	duler butt	on a popi	ın askino	a confi	rmation f	or sche	dule	with Ok a
Steps. The	r eneming	on sene	autor out	on, a pope	ip usining	, a com	i indition i	or sene	aute	with one
Step6: As v	ve click on	Ok butt	on then a	message	dialog bo	ox show	s as "Sch	edule <mark>U</mark>	Jpdat	e Success
				Ũ	Ū					
Step7: The	n click on	Ok butto	n to clos	e the me <mark>ss</mark>	age dialo	g box.				
Set the He	otdials fo	r the C	ampaig	<u>n</u>						
This mecha	nism facil	itates me	erging sir	gle digit r	anging fr	om (1-5	5) to a 10	digit te	lephc	one numbe
via agent a	pplication.					0111 (1 0	<i>,  </i>		-opine	, <b>cu</b> c
	· r · · · · · · · · ·									
Step1. Con	sider the s	tens as a	bove for	opening C	amnaign	page				
Step 1. con		a a a a a a		op <b>o</b> ning c	p	P <b>~8</b> •				
	SMART DIAL	a.o —					* Yo	ur Alerts 🛛 💿	0	🕽 demo 👻 🚺

· · ·	<ul> <li>CRM Configuration</li> </ul>									
	Campaign Queue	100	(296) IPRUAB	IPRU AB	A (0) / M (10)					
<u> </u>	• Mapping		(402) DEMOLOCAL	Demo Loca Type Channel	A (0) / M (10)		000	-	×.	
=	• Campaign Transfer mapping	-	(439) SITINETWORK	Siti Network	A (0) / M (10)			[22]		
- 1	• Caliback - Re schedule		(524) SITICABLE	NA	A (0) / M (10)			(C)		
-	<ul> <li>SMS Template</li> </ul>		(994) DEMO	demo campaign	A (7) / M (3)	<b>1</b>		(C)	×.	
	File Category									1
1	Music On Hold								/	
	• SMS Disp Mapping							Click o the Hot	n this icon to o dials dialog bo	pen
	LEAD MANAGEMENT							-		



#### Step3: Hotdials dialog box appears as follows:

Hotdials	×
Enter the number in textbox	<u></u>
Hotdial 1.	
Hotdial 2.	
Hotdial 3.	
Hotdial 4.	
Hotdial 5.	-
Click on Save button SAVE	

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.

#### **External Web CRM for the Campaign**

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

0	≡ SMART DIAL <sup>**</sup>					vierts 💿	0		Q Search
*	CAMPAIGN MANAGEMENT						φ <b>σ</b>	+	
-08	• Campaign								
	CRM Configuration     Campaign Queue	(296) IPRUAB	IPRU AB	A (0) / M (10)	E2				
C.	• Mapping	(402) DEMOLOCAL	Demo Loca Type Channel	A (0) / M (10)					
=	• Campaign Transfer mapping	(439) SITINETWORK	Siti Network	A (0) / M (10)				(****)	
	Callback - Re schedule     Email Template	(524) SITICABLE	NA	A (0) / M (10)					
	• SMS Template	(994) <u>DEMO</u>	demo campaign	A (7) / M (3)	<b>V</b>			<b>V</b>	
	• File Category								
Laid.	Music On Hold						Г	Click on this ic	on to open
	SMS Disp Mapping						L	the webcrm dia	alog box

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

Web Crm for (DEMO)	×
Web Crm 🔄 —— Tick on checkbox to enable web CRM	*
Web Crm Path	
Alternate Path 1	
Alternate Path 2 Enter the alternate path	=
Click on Save button	-
	Save



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

		-									
<u>_</u>	SMART DIAL					🕴 Your A	lerts 💿		demo 🤝	Q Search	
<b>~</b>	CAMPAIGN MANAGEMENT							( ¢ ) ( @			
08	• Campaign										<u>^</u>
	CRM Configuration     Campaign Queue		(296) IPRUAB	IPRU AB	A (0) / M (10)				<b>P</b>	• • • •	
<sup>c</sup> "	• Mapping	-	(402) DEMOLOCAL	Demo Loca Type Channel	A (0) / M (10)					• • • •	
-	Campaign Transfer mapping		(439) SITINETWORK	Siti Network	A (0) / M (10)	(FT)		(1 <sup>111</sup> )		• • • •	
	• Email Template		(524) SITICABLE	NA	A (0) / M (10)				<b>2</b>		
	SMS Template		(994) <u>DEMO</u>	demo campaign	A (7) / M (3)	<b>V</b>		[[[[[]]]]]		• • • •	
44	File Category     User Mapping to DID     Music On Hold		Click on campaign name	to open the							
	<ul> <li>SMS Disp Mapping</li> </ul>		campaign configuration of	lialog box							

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

Campaign Configuration		
Call Wrapup Time: (Max 60 Sec.)	4	
Call Time Difference: (Max 60 Sec.)	10	
Call Originate Time: (Max 60 Sec.)	53	
Call Dialing Ratio: (Max 5)	2	
Auto Dispose Duration:	0	
Accept/Reject Timeout: (Max 60 Sec.)	20	
Retry Time:(Max 15 Sec.)	1	
Callback Pre Notification:(Max 60 Min.)	10	
Auto Logout After Idle Duration:(Max 180 Min.)	0	

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

Step4: Then click on  $\blacktriangleright$  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.

$\odot$	SMART DIAL**					lerts 📀	0		Q Search
	CAMPAIGN MANAGEMENT						(		
908	• Campaign	# Campaign Name							Action
	CRM Configuration     Campaign Queue	(296) IPRUAB	IPRU AB	A (0) / M (10)		-	=		
C	• Mapping	(402) DEMOLOCAL	Demo Loca Type Channel	A (0) / M (10)					• • • • •
	Campaign Transfer mapping     Callback Be schedule	(439) SITINETWORK	Siti Network	A (0) / M (10)		-		-	• • • •
	Email Template	(524) SITICABLE	NA	A (0) / M (10)		- /			• • • •
	<ul> <li>SMS Template</li> </ul>	(994) <u>DEMO</u>	demo campaign	A (7) / M (3)		-		×.	• • • •
Land	File Category     User Mapping to DID					2.			
	- Music On Hold	Tick on checkbox to se	elect the campaign		Click o	n this icon	to delete t	he selected ca	Impaign
	o sms biep mapping								

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

۲					Alerts 🔘	0	Q Search
1						• +	
-02	• Campaign						Action
00	CRM Configuration     Campaign Queue	(296) IPRUAB	IPRU AB	A (0) / M (10)			
C*	• Mapping	(402) DEMOLOCAL	Demo Loca	A (0) / M (10)			
	Campaign Transfer mapping     Callback - Re schedule	(439) <u>SITINETWORK</u>	Siti Networl Are you sure to delete the campaign.	A (0) / M (10)			
-	Email Template	(524) SITICABLE	NA OK	A (0) / M (10)			
- 22	SMS Template     File Category	(994) <u>DEMO</u>	demo camp	A (7) / M (3)			
Land	• User Mapping to DID		/				
	Music On Hold		Click on Ok button				
	o swis bisp mapping						

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.

#### **Creation Of CRM Fields:**

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

	≡ SMART DIAL <sup>**</sup>	🐐 Your Alerts 💿 😡 demo 🛩	Q Search
	CAMPAIGN MANAGEMENT	Campaign Select campaign 🖉 🔎 View Crm	+
	Campaign     CRM Configuration	Select the comparent through	
	Campaign Queue     Mapping	Click on 'View CRM' button to show the CRM fields	
	Campaign Transfer mapping     Callback - Re schedule		
-	• Email Template		
2	SMS Template     File Category		10 10
	User Mapping to DID     Music On Hold		
	SMS Disp Mapping		

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

0	≡ SMART DIAL <sup>**</sup>				🐐 Your Alerts 💿 🌘	🔊 demo 👻	Q s	earch	
*	CAMPAIGN MANAGEMENT	Campaign	DEMO	View Crm	Click on + icon to open d for "Create New Caption	alog box Field"	•		Î
08	Campaign     CRM Configuration	Caption     Phone	Type	Details	Parent Name	Required	Read Only	History	Is Pho
Co	Campaign Queue     Mapping	× Name	Text	50					
-	• Campaign Transfer mapping	X Address     X Gender	Combo	Male,Female,Trans					
-	• Callback - Re schedule     • Email Template	X Last Payment     X Plan	Text	20 20		[***]			
-	SMS Template     File Category	<ul> <li>× Storename</li> <li>× Location</li> </ul>	Text	66 66					
Land	• User Mapping to DID	<ul> <li>x State</li> <li>x DOB</li> </ul>	Text	55 25					
	Music On Hold     SMS Disp Mapping	Preview							
	LEAD MANAGEMENT								
	Assign Lead								
	• Lead Manager     • CRM Data								L
	Callback Assign								

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



Create New Field	d Caption		
All form fields are	e required.	Enter the Name for CRM field	
Name Type Parent	Text • Select •	Select the type of field from selectiion	
Text Length	20	Select the parent field, if required	
Click o	n Save button		
	Save Cancel		
Step4: Fill up the ap	propriate data as shown in pictu Field Caption	ure	
All form field	ls are required.		
Name Type Parent Text Length	Country Text Select 100	- -	
Click on Sa	ave button		
	Save	Cancel	
Step5: Then click or <b>Deletion Of CRM</b>	a Save button save the selected a	and entered data.	
Step1: Consider the	steps as above for opening the <b>(</b>	CRM fields	
Step2: When CRM f	ields shows then click on cross	(x) icon to delete the crm field as shown in picture	



= SMART DIA	2.0			🐐 Your Alerts 🕕	😡 demo 👻	Q :	Search	
CAMPAIGN MANAGEMENT	Campaign	DEMO	View Crm			-		
Campaign     CRM Configuration	Caption	Туре	Details	Parent Name	Required	Read Only	History	Is Pho
• Campaign Queue	× Name	Text	50					
O Mapping     Campaign Transfer mapping	<ul> <li>× Address</li> <li>× Condex</li> </ul>	Text	250			<b>[</b> ]		<b>[</b> ]
• Callback - Re schedule	× Last Payment	Text	20			(FT)		
o Email Template     o SMS Template	× Plan × Storename	Text	20 55		E	E	(m)	
• File Category	× Location	Text	55					
• User Mapping to DID	× State × DOB	Text	25					
SMS Disp Mapping      LEAD MANAGEMENT     Import Lead     Assign Lead     Cell Manager     Cell Manager     Cell Manager	Preview	k on x icon to dele	ate the crm fields					

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

$\odot$ = SMART DIAL <sup>**</sup>				🐐 Your Alerts	o 🙆 demo	- Q	Search		
CAMPAIGN MANAGEMENT	Campaign DEM	•	P View Crm			+		Â	
Campaign     CRM Configuration	Caption     Phone	Type Details Text 10		Parent Nar	me Required	Read Only	History Is Pho		
C Campaign Queue • Mapping	<ul> <li>x Name</li> <li>x Address</li> </ul>	Delete caption?	d-1-4- it di bit						
Campaign Transfer mapping Callback - Re schedule	x Gender x Last Payment	Note: Deleting Parent will t	delete its corresponding critic						
Email Template     SMS Template	× Plan × Storename	Text 55	ок с	incel					
File Category	× Location × State	Text 55 Text 55							
Music On Hold	• x DOB Preview	Text 25							
SMS Disp Mapping		С	lick on Ok button						
• Import Lead									
Stor 4. Non aliah th	"Ol-" h		l4	that data					
Step4: Now click on the	e Ok button, wh	ich will resul	it removal of	that data.					
A CAR	k 111								
	201								
Description of check	<u>aboxes :</u>								
Required Read	Only History	Is Phone	Is Dispositi	on Position	Parent				
				1					
				2					
Checkbox 1 - Required	- If this button is t	ticked then e	entering this o	letail will be r	nandatory				
entencen i nequirea									
Checkbox 2 - Read Onl received from lead.	y - If this button is	s ticked, then	1 this slot wo	i't be editable	, especially a	applied	to seal the	crm details	
Checkbox3 - History - I clicking on 'History' bu	If a crm detail is m atton in CRM.	arked for his	story checkbo	ox, then this de	etail will sho	w in the	e history se	ction after	
Checkbox4 - Is Disposi	tion - If this check	hox is ticked	then this de	tail will he sh	own in the d	lisnositi	on report		
Checkbox4 - Is Disposi	tion - If this check	box is ticked	l, then this de	tail will be sh	own in the d	lispositi	on 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





Create New Queue
Campaign Name*
DEMO
Queue Name* support
Queue DID *
0117160084
Save Cancel
Step7: At last click on Save button to save the data.
O2O Mapping
Sten8: Then click on O2O Manning icon as shown in below figure
Steps. Then energing won as shown in below right
SMART DIAL <sup>30</sup> // Your Alerts 💿 🛞 demo 🛩 Q. Search
• Campaign • CRM Configuration         Campaign Hame         Qurue Hame         Qurue IDD           • Campaign (Configuration)         DEMO         Sales         0117160083
• Campaign Queue     DEMO     support     011716084       • Mapping
Click on this icon to open "Q2Q Mapping" page
Email Template     SMS Template
Origination     File Category     Nucle On Lead
Infl        • Marcine Control of Con
Step9: "O2O Manning" page open with queue to queue manning details
Steps: Q2Q Mupping page open with queue to queue mupping details.
😡 = SMART DIAL <sup>20</sup> 9 Your Alerts 💿 😡 demo - Q Search
CAMPAIGN MANAGEMENT
• Campaign     From Campaign     From Queue     To Campaign     To Queue     Queue Priority       • CRM Configuration     • CRM Configuration
• Campaign Queue       • Mapping
Campaign Transfer mapping     Callback - Re schedule     Click on + icon to open "Mapping New Queue" dialog box
SMS Template
File Category     Music On Hold
User Mapping to DID     SMS Disp Mapping
Step10: Then click on Plus (+) icon to open "Mapping New Oueue" dialog box as shown in below figure









0	≡ SMART DIAL <sup>**</sup>		🐬 Your Alerts 🛛 💿	demo 👻 🔍 Search
<b>~</b>	CAMPAIGN MANAGEMENT			
	• Campaign	Campaign Name	Queue Name	Queue DID
03	CRM Configuration	DEMO	sales	0117160083
<b>a</b> 10	Campaign Queue	DEMO	support	0117160084
۳.	• Mapping	DEMOLOCAL	account	0117160085
=	• Campaign Transfer mapping			
	Callback - Re schedule			
	• Email Template			Click on Delete icon
	<ul> <li>SMS Template</li> </ul>	LICK ON CHECKDOX TO SELECT IT		
2	• File Category			
Lot	• User Mapping to DID			
	Music On Hold			
	• SMS Disp Mapping			
Sten	2. Then click on D	elete icon to delete the selected	l data	



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

≡ SMART DIAL <sup>**</sup>				🐬 Your Alerts 🛛 🕕	🙆 demo 👻	Q Search
					@ @ <b>*</b> [ + ]	
<ul> <li>Campaign</li> </ul>						
CRM Configuration	DEMO		sales		0117160083	
Campaign Queue	DEMO		support		0117160084	
• Mapping	DEMOLOCAL	Delete selected cap	appigg guoue 2		0117160085	
Campaign Transfer mapping		Delete selected car	npaign queue v.			
Callback - Re schedule						
<ul> <li>Email Template</li> </ul>		OK	Cancel			
<ul> <li>SMS Template</li> </ul>						
• File Category						
User Mapping to DID		Click on Ok button				
<ul> <li>Music On Hold</li> </ul>						
SMS Disp Mapping						

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" subsub menu to enable appearance of mapping page

0	≡ SMART DIAL <sup>™</sup>				🐐 Your Alerts 🛛 💿	🙆 demo 👻	Q Search	
	CAMPAIGN MANAGEMENT	Campaign Select	Here					
	• Campaign			Users Redial Priority Prefix TL Mapping		Sub Dispositions	Dispositions Mapped To	
	• CRM Configuration		1				User	
c m	• Campaign Queue							
	• Mapping			Click on vie	ew icon to show the			
-	Campaign Transfer mapping			mapping fo	or selected campaign			
	• Callback - Re schedule			Select the campaign				
	• Email Template							
-	SMS Template							
2	• File Category							
Land	• Music On Hold							
	User Mapping to DID							
	SMS Disp Mapping							

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



<b>@</b>	≡ SMART DIAL <sup>**</sup>						🖗 Your Alerts 🛛 😶	🛞 demo 👻	Q Search		
*	CAMPAIGN MANAGEMENT	Campaign DEA	NO								
-	Campaign			Users R	RM Skill / Pr	efix TL Mapping		Sub Dispositions	Dispositions Mapped To	isFwd Activ	
×	• CRM Configuration	🖂 Australia	Auto	admin	V Normal	-	Sale		User	Ema	
Co	Campaign Queue     Manning	Canada	Callback	v bipin	Normal     Normal	-	Busy				
	Campaign Transfer mapping		Progressive	💌 san	Normal •		CALLBACK				
	• Callback - Re schedule	1	Preview TooProok	rahul	Normal •		Interested				
-	• Email Template	Tick on Count	ry Refreshment	sohan rahul1		Tick on Disp	sition checkbox to				
<i>~</i>	SMS Template     Elle Category	map country with campaign		abhishek	Normal •	map dispos	ion with campaign				
1.04	Music On Hold	Tick on Use	2.	to ankur	Normal						
	• User Mapping to DID	map mode	with campaign	kahuja	Normal •	•					
	• SMS Disp Mapping			deepak	Normal •						
	LEAD MANAGEMENT	I IT	3. ick on Users chec	sbox to	4.						
	Assign Lead	i i	hap user's with car	npaign Fick prov	ide redial permission	n to user					
	a Lood Managor	* [				m				P.	
							the second s	~			
9	SMART DIAL						Your Alerts 🕕	🛞 demo 👻	Q Search		
<b>~</b>	CAMPAIGN MANAGEMENT	Campaign DEM	D								
~	• Campaign		Users CRM	Skill / Pro	fix TL Mapping		Bub Dispositions	Dispositions is Mapped To		Activity Mapped to	
~o	CRM Configuration	Auto	🛛 <u>admin</u> 🔍	Normal	]	Sale	I Hot Lead	abhishek	Email	abhishek	
C 🌒 📔	Campaign Queue     Mapping	Callback	V bipin V V nitin V	Normal +		Busy	Cold Lead	admin akash	10.	🛄 admin 🛄 akash	
-	Campaign Transfer mapping	Z Break Z Progressive	🛛 san	Normal 👻		CALLBACK	_ /	i angelo ankur	Tick on activity checkbox to map	angelo ankur	
	• Callback - Re schedule	Z Preview	V rahul	Normal +	6.	Interested	/	ashish	campaign	ashish	
- 1	• Email Template	Refreshment	rahul1		Click on dispositio disposition, dispos	n label to enable the su tion mapped to user da	a	deepak		🔲 deepak	
<i>P</i>	SMS Template		Abhishek	Normal -				🔲 kahuja	to map user with	kahuja	
	Music On Hold		ankur	Normal -		Tick on sub disposition map the sub disposition	ns checkbox to n with campaign	initin rahul	11.	initin rahul	
	• User Mapping to DID		V test	Normal +				🔲 ravi	2	🛄 ravi	
	SMS Disp Mapping		V deepak	Normal -			8.	shashank	Tick on IsFwd checkbox to	shashank	
	LEAD MANAGEMENT		S anaanank	Normai		disposition with th	to map selected a user	user1	disposition forwarding	user1	
	o Import Lead								permission to user		
	Lead Manager	*	[			1		l.			
Лар	• Lead Manager	campai	<u>gn</u>					-		•	
	1	103.									
ton 1	· Consider the sta	na ag ah	ave to che	u monni	ng data of	anmaian					
lepi	. Consider the ste	ps as abo	ove to she	w mappi	lig data of	campaign					
tep2	: Then tick on Co	untry ch	eckbox to	map the	country w	ith selected	campaign				
_											
	Country										
	Accellen										



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



Campaign DEMO	▼	Click o	n disposition label to	enable sub dispositions	
Country User Mode	✓ Users CRM Ski Redial Pri	ill / ority Prefix	TL Mapping	Dispositions	Sub Dispositions
<ul> <li>Australia</li> <li>✓ Auto</li> <li>✓ Manual</li> <li>✓ Manual</li> <li>✓ Callback</li> <li>✓ UK</li> <li>✓ Break</li> <li>✓ Progressive</li> <li>Mo</li> <li>✓ Preview</li> <li>TeaBreak</li> <li>✓ Refreshment</li> </ul>	✓ admin     ✓       ✓ kamal     ✓       ✓ rahul     □       Sohan     □       □ rahul1     □       ✓ abhishek     □       ✓ abhish     □       ✓ ashish     □       ✓ test     □       ✓ kahuja     □       ✓ deepak     □       ✓ shashank     □	Normal     •       Normal     •	1. Tick on disposition checkbox to map disposition with campaign	Sale Solution Soluti	✓ Hot Lead ✓ Cold Lead tion to map campaign

## 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

Campaign DEM	)		•								
User Mode	Users	CRM Ski Redial Prie	ill / F ority F	Prefi	TL Mapping	Dispositions	Sub Dispositions	Dispositions Mapped To User	isFw	d Activity	Activity Mapped to User
Z Auto	admin	<b>S</b>	Normal	-		Sale	Hot Lead	🔲 abhishek		🟹 Email	🔲 abhishek
Z Manual	🔽 kamal		Normal	-		No Answer	Cold Lead	🔲 admin		1	🔲 admin
/ Callback	rahul		Normal	-		Busy		🔲 akash		1.	🔲 akash
/ Break	🔲 sohan			-		Hangup		angelo		Tick on Activity	angelo
Mo	rahul1		-	-		CALLBACK		ankur		checkbox to map	ankur
7 Preview	abhishek		Normal	-		Interested		ashish		activity with	ashish
TeaBreak	achich		Normal	-				Dipin		campaign	Dipin
Refreshment	ashish		Normal	-				deepak			E deepak
	ankur		Normal	-				📄 kahuja			📄 kabuja
	IV test		Normal	-				kamal			kamal
	🔽 <u>kahuja</u>		Normal	-				in nitin			nitin
	deepak		Normal	-				Tahul			✓ rahul
	shashank		Normal	-				ravi			🔲 ravi
								🔲 san		2.	🗐 san
								shashank		Tick on checkbox	🔲 shashank
								🔲 test		to map user with	🔲 test
								🔲 user1		activity	🔲 user1
								vikarant			vikarant

# 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.



Campaign DEMO	- I -		
Country l	User Mode 🛛 Users	CRM Skill / Redial Priority	Prefix TL Mapping
Australia Canada Ulandia UK USA Clint Clint the	Auto Manual Callback Break Progressive Mo Preview TeaBreak Refreshment 1. ick on TL user label to enable e user's in TL mapping colum	Normal	<ul> <li>admin</li> <li>kamal</li> <li>abhishek</li> <li>ashish</li> <li>ashish</li> <li>ankur</li> <li>test</li> <li>deepak</li> <li>deepak</li> <li>shashank</li> </ul>

# 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

0	≡ SMART DIAL <sup>**</sup>		🖗 Your Alerts 🛛 💿	lemo -	Search
*	CAMPAIGN MANAGEMENT			• • •	
	• Campaign				
-06	CRM Configuration				
c n	Campaign Queue				
- C. Y	• Mapping		click on + i	con to add	
	• Campaign Transfer mapping				
	• Callback - Re schedule				
	• Email Template				
	SMS Template				
1 e 2	• File Category				
1.4.4	• User Mapping to DID				
- 111	Music On Hold				
	SMS Disp Mapping				

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





Save Cancel

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:

0	≡ SMART DIAL <sup>**</sup>			🐐 Your Alerts 🕠	😡 demo 👻	Q Search
*	CAMPAIGN MANAGEMENT				φ ω +	
	• Campaign	From Campaign				<u>^</u>
1000	• CRM Configuration	DEMO	DEMOLOCAL			
<b>C</b> 10	Campaign Queue					
	• Mapping					
- <b>1</b>	• Campaign Transfer mapping					
	• Callback - Re schedule					
	<ul> <li>Email Template</li> </ul>					
	<ul> <li>SMS Template</li> </ul>					
	• File Category					
Land	<ul> <li>User Mapping to DID</li> </ul>					
	Music On Hold					
	• SMS Disp Mapping					

# 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



(	≡ SMART DIAL <sup>**</sup>			Your Alerts 💿 😡 demo 👻 Q Search	
*	CAMPAIGN MANAGEMENT			Ø 🖉 +	
	Campaign	Campaign Name	Queue Name	Queue DID	^
OG	CRM Configuration	DEMO	sales	0117160083	
en))	Campaign Queue	DEMO	support	0117160084	
<b>C</b> *	• Mapping	DEMOLOCAL	account	0117160085	
-	• Campaign Transfer mapping				
	• Callback - Re schedule				
	• Email Template			Click on Delete icon	
	<ul> <li>SMS Template</li> </ul>	TICK ON CHECKDOX TO SELECT IT			
~	• File Category				
Land	• User Mapping to DID				
	Music On Hold				
	• SMS Disp Mapping				

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

0	≡ SMART DIAL <sup>™</sup>			🖗 Your Alerts 💿 🛛 🛞 demo 👻	Q Search
	CAMPAIGN MANAGEMENT			¢ .	
					· · · · · · · · · · · · · · · · · · ·
	• CRM Configuration	DEMO	DEMOLOCAL		
	Campaign Queue				
	• Mapping		Delete selected Campaign Transfer Manning?		
	• Campaign Transfer mapping				
	Callback - Re schedule				
	<ul> <li>Email Template</li> </ul>		OK Cancel		
	<ul> <li>SMS Template</li> </ul>				
	• File Category		Click on Ok button		
	<ul> <li>User Mapping to DID</li> </ul>				
	<ul> <li>Music On Hold</li> </ul>				
	<ul> <li>SMS Disp Mapping</li> </ul>				

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

0	≡ SMART DIAL <sup>**</sup>				🦩 Your A	Alerts 📀	🛞 demo 👻	Q Search
~		Campaign	Created By	Callback Type	F	From Date	To Date	
	<ul> <li>CAMPAIGN MANAGEMENT</li> </ul>	Select campaigns	Select users	Please Select	-	2020-05-01 00	2020-05-01 23	
100	• Campaign	Phone Phone						
	• CRM Configuration							
	Campaign Queue							
	• Mapping							
-	• Campaign Transfer mapping							
	o Callback - Re schedule							
	• Email Template							
-	SMS Template							
	• File Category							
	<ul> <li>User Mapping to DID</li> </ul>							
	Music On Hold							
	<ul> <li>SMS Disp Mapping</li> </ul>							
Step2 Step3	<ul><li>2: Select the Singl</li><li>3: After that click</li></ul>	e/Multiple camp on "View" icon	baign, date range to display the da	and other sea ta on panel	arch cr	iteria op	otion	
Step-	E Select the respe	ctive data by cli	cking on checkbo	ox icon				
Step	5: As we click on	"Assign" 👛 ic	con then a small d	ialog box op	en as "	'Want to	reassign?"	with 'Ok' and
Step(	5: When we click ge option	on "Ok" button	then new dialog l	box open as '	'Set As	ssign To	Details" w	ith "Assign To'



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

0	= s	MART DIAL**	🕈 Your Alerta 💿 😡 demo 👻 📿 Search	
*	CAMPAIGN     Campaig	MANAGEMENT	O     Avert Template Name Email Subject Email Content Attachment Actio	n
08	• CRM Cor • Campaig	nfiguration	Click on plus "#" icon to act new template	
==	<ul> <li>Mapping</li> <li>Campaig</li> </ul>	in Transfer mapping		
	<ul> <li>Callback</li> <li>Email Te</li> </ul>	- Reschedule		
	<ul> <li>SMS Ten</li> <li>File Cate</li> </ul>	nplate		
Lott	• Music Or • User Maj	n Hold pping to DID		
	<ul> <li>SMS Dis</li> </ul>	p Mapping		
Step	2: Click	on Plus 📍	icon to open "Add Emai <mark>l Template" dialog</mark> box as shown in picture	
			and the second	
Add Ei	mail Template		×	
Car	mpaign/Alert*	DEMO	Select the campaign or Service Alert	
Nar	ne*		Enter the Template name	
Sub	oject*			
		🛃 🗋   B Z	U ARC E = = = Styles • Format • Font Family • Font Size •	
		X 🗈 🕰 🛅 (	1월 88 馀 三・三・ 宗 鐸 44   ∽ (♥   ∞ 炎 ů 鳖 🛷 🕲 ****   図 ⊙	
			ĨĨ, ⇒   m m² ¥   Ⅲ Ⅲ   — 2 Ⅲ   ×, ×   Ω ♥ ┃ ━   ④   M ™	
Mes	sage*			
			Enter the message	
		Path: p		
	Click	on Save buttor	n Save Reset	
C+	. <b>.</b>		antena dente en el esso fa el esse etenso	
Step:	3: FIII up	o the approp	priate data as snown in above picture	
Ston	1. Eirct a	coloct the c	ampaign or convice alort	
Step	+. FIISUS		מוויףמוצוו טו שבו אוכב מוכו נ	
Sten	5: Then	Enter the T	emplate name. Subject and message	
Juch				
Step	6: At las	t click on Sa	ave button to save the data	











sub-sub menu to enable appearance of `SMS Template` Page	
SMART DIAL* Your Alerts () (on + icon to open "New Template" dialog box Calkback Researched Calkback Researched Calkback Researched Stats Template Stats Disp Mapping Stats Disp Mapping	
Step2: Click on Plus + icon to open "New Template" dialog box as shown in picture	
NEW TEMPLATE	
Template Name* Test Enter the template name Enter the template name	
SIMS Text * Enter the message	
Click on Save button	
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	
Image: product of the system     Image: product of the system       Image: product of the system     SMS Text       Image: product of the system     Action	
1 test	
Click on edit icon	
Step2: After clicking on edit icon, "Edit SMS Template" dialog box open as follows:	


Template Name*	test1	
SMS Text*	test	 Edit the template name and text message as required
	SAVE RESET Click on Save button	
tep3: Edit optior	n available on template name and message	
tep4: Edit the set	tting as required, and then click on Save button	

# **Delete SMS Template**

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

¢ +		
# Template Name	SMS Text	Action
1 test1	test	2 1
		Click on delete icon
tep2: After clicki	ing the delete icon, a popup message asking a confirmation for delete	
¢ +		
		Action
1 test1	test	

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

OK

Click on Ok button

Are you sure want to delete it!

Cancel



# 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

🛞 🔳 SMJ	ART DIAL <sup>**</sup>			🐐 Your Alerts 🛛 🕕	@ demo ~ Q Search	
CAMPAIGN MA	NAGEMENT	Campaign : Please Select	Category : Ple	ase Select -	+	
CRM Configur	ration	1. Select the camp	2. Click on View Cateo data for selected can	gry icon to show the hapaign		
• Mapping	ansfer mapping					
Callback - Re     Email Templa	schedule					
SMS Templat     SMS Templat	te					
User Mapping     Music On Hol	g to DID					
• SMS Disp Ma	ipping					
Ston 2. First S.	alaat tha c	ampaign than alight an	View estacemaiser	to charry the act		
Step2: First Se	elect the c	ampaign, then click on	view category icor	to show the cate	egory	
			Diseas Calast	_		
Campaign : DEMO	•	Category :	Fiedse Select	•	<b>•</b>	
# Campaign		Category				
					open "New Catagon" dialog ber	
					open new category dialog bos	
Step3: When c	ategory p	age shows as above, the	en click on + icon to	open "New Cat	egory" dialog box as foll	OWS:
_						
NEW CAT	EGORY			×		
Campaign*		DEMO	]			
Category*		sales	]			
			Enter the ca	legory		
•	Save	Cancel				
		Click on Save butto	on			
Step4: Enter th	ne categor	y name in category text	box, then click on	Save button		
Step5: After cl	icking on	Save button, created ca	ategory shows on ca	tegory page		
		// <b></b>				
Step6: Then cl	ick on cro	oss "X" button to close t	the "New Category'	dialog box		



# Add New File for Category

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

Image: Select the category     Category<	ck on this icon
Step2: Then select the category name from category combo box	
Step3: After that click on + icon to appear "New File" dialog box	
SMART DIAL       Image: Control of the second	Search
Campaign : DEMO Category : sales	+
1.     2.       Select the campaign     Select the category	3. Click on "View File" icon to show the file for selected category
Step2: Then select the category name from category combo box	







# 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

0	≡ SMART DIAL <sup>**</sup>			🖣 Your Al	lerts 📀	🙆 demo 👻	Q Search
~		Note: Music on hold file format	(PCM uncompressed and at	ributes 8000Hz, 16 bits 👩 👳			
	CAMPAIGN MANAGEMENT	Campaigo	File		Ausic on hold file	upload	
03	Campaign     CRM Configuration						
	o Campaign Queue	DEMO	default	4.	Choose File	Upload	0%
C.	o Manning		<u>A</u>	t last click on "Reload Asterisk"			
	e Campaign Transfer mapping	DEMOLOCAL	default	on for changes update in server	Choose File	Upload	0%
	o Caliback - Re schedule						
	• Email Template	IPRUAB	default		Choose File	Upload	0%
	SMS Template						
2	• File Category	SITINETWORK	1111 SITINETWORK ×		Choose File	Upload	0%
	Music On Hold						
	• User Mapping to DID		3	/			
	<ul> <li>SMS Disp Mapping</li> </ul>	Affter file upl	oad it shows here	1./	-	2.	
	LEAD MANAGEMENT			to select the voice file		Then cli upload t	ck on Upload button to the voice file
	• Import Lead				-		
ep	2: Now in the page	, click on "Choos	se File" option	to select the voice file	;		
tep	3: Upload a voice f	ile (PCM uncom	pressed 8000H	IZ, 16 bits mono) by c	licking c	on Upload	l button

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

0	$\equiv$ SMART DIAL <sup>**</sup>			∛ You	r Alerts 🛛 💿	🔕 demo 👻	Q Search	
*	CAMPAIGN MANAGEMENT	Note: Music on hold file forma mono)	it (PCM uncompressed and attributes	8000Hz, 16 bits 💁 🗢				
	• Campaign	Campaign	File		Music on hold file	upload		^
03	• CRM Configuration	DEMO	default or the	2./	Choose File	Upload	0%	
	• Campaign Queue		Update the	e changes on Server				
	• Mapping				Channa File	I Internet	09/	
	• Campaign Transfer mapping	DEMOLOCAL	default		Choose The	Opload	078	
	• Callback - Re schedule							
	Email Template	IPRUAB	default		Choose File	Upload	0%	
_	• SMS Template							
22	• File Category	SITICABLE	default		Choose File	Upload	0%	
Lot	<ul> <li>Music On Hold</li> </ul>							
	User Mapping to DID				Choose File	Unload	0%	
	SMS Disp Mapping	STINETWORK	TTT_STIME WORK &					
	LEAD MANAGEMENT							
	<ul> <li>Import Lead</li> </ul>		1.	Click on cross "x" icon to rem	nove			1
	Assign Lead			the customize music official	ino			

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

0	≡ SMART DIAL <sup>**</sup>					🐐 Your Alerts 🛛 💿	🔕 demo 👻	Q Search							
*	CAMPAIGN MANAGEMENT	Campaign	Please Select	Disp	osition Type	Select Dispor	-	• •							
08	Campaign     CRM Configuration	Campaign		Disposition		Template		Route							
<b>C</b> <sup>®</sup>	Campaign Queue     Mapping     Compaign Transfer manning	Select the disposition type													
	• Callback - Re schedule     • Email Template		Click on View icon to												
	SMS Template     File Category		show the data												
Land	Music On Hold     User Mapping to DID														
	<ul> <li>SMS Disp Mapping</li> </ul>														
Step2	2: First select the c	ampaign fron	n Campaign c	ombo bo	x										
Step3: Then select the Agent/Dialer Disposition from disposition type															
Step	4: At last click on	View icon to	display the da	ita on SM	S Disp Ma	pping 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

Template Route Mapping	:	×		
Disposition	Please Select	T		
SMS Route	Please Select	-	1. Select the Agent Disposition	
SMS Template	Please Select	•	2. Select the SMS Route	
			3. Select the SMS Template	
	Click on Save button 4.			
		Save Cancel		
Step4.1: Select	the Agent Disposition			
100				
Case? => Mar	Route with SMS Template			
	Route with SWIS Template			
Template Route Mapping	Please Select	×		
SMS Douto	Please Select			
SMS Torrelate	Please Select		1. Select the SMS Route	
Sivis remplate			2. Select the SMS Template	
	Click on Save button 3.			
		Save Cancel		
tep4: When you sele	ct the Dialer Disposition then o	only one case arise		
Case1 => Map	Route with Dialer Disposition	and template		
-	-	-		



isposition	Please Select	
MS Route	Please Select	1. Select the Dialer Disposition
MS Template	Please Select	Select the SMS Route
		3. Select the SMS Template
[	Click on Save button 4.	

## **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

0	= SMART DIAL	L			🖗 Your Alerts 🛛 💿	🙆 demo 👻	Q Search		
** ** **	CAMPAIGN MANAGEMENT     Campaign     CRM Configuration     Campaign Queue     Mapping     Campaign Transfer mapping	Campaign	Please Select	Disposition Type	Select Dispose		Route		
	Callback - Re schedule     Email Template     SMS Template     File Category     Music On Hold     User Mapping to DID     SMS Disp Mapping				Click on V show the c	iew icon to lata			
Step2	: First select the	e campaign fro	om Campaign <mark>cor</mark>	nbo box					
Step3	: Then select the	e Agent/Diale	er Disposition from	n disposition t	vpe				
Step4	: At last click of	n View icon to	o display the data	on SMS Disp	Mapping pag	e			
Campai	gn DEM	мо	<ul> <li>Disposition</li> </ul>	Type Agen	t Dispos 🔻		<b>•</b> +		
	Campaign	Di	isposition	Template		Rout	e	<u>^</u>	
	DEMO	DU	usy	testi		lest	ng		
Б	Tick on checkbox to s	elect the data				Click	on Delete icon		
Ľ						Circk			
Step5	: After that sele	ct the data wh	tich you want to d	lelete					
Step6	Then click on	Delete icon w	which is before the	e add icon					
Step7	: After clicking	on delete icon	n message shows	" Delete select	ed SMS Rout	te ?."			
Step8	: At last click of	n Ok button to	o 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

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#### 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

- 18	• Ca	ampaign Que	ue											Ø.	*					
-	o Ma	lapping		"	Campaign		Lead N	ame		Die	ating Mod	le	Zone D	Dialing Pattern	Actic	an a	^			
~~~	• Ca	ampaign Trai	nsfer mappin	9																
C.S.	o Ca	allback - Res	chedule	-																
	0 SM	MS Template		-								Г	Click on	n + icon to uplo	ad lead					
	o File	le Category																		
	• Mu	lusic On Hold																		
	o Us	ser Mapping	to DID	_																
	o SM	MS Disp Map	ping	-																
1.111	LEAD	D MANAGEN	IENT																	
	• A5	ssign Lead		-																
	• Lei	ead Manager																		
	• CR	RM Data																		
	• Ca	allback Assig	in .																	
<b>C</b> 1	· ··	. 1.	1		1	447	T 1 1 (	*1 >> 1.	1	1										
Step	2: Fir	rst clic	ck on ·	+1con	to open th	ie "t	Jpload I	ile di	alog	box										
1					•		•		U											
Sten	3∙ "U	Ipload	File"	' dialo	g box anne	ear a	s follow	S.												
υιοp	·· ·	proud		ununo	B con app.		0 10110	5.												
Uplo																		×		
N	ate: On	nlv crm	field w	ith first	column head	ine (p	hone).	0.1												
		,			containing	ь (р		Selec	ct the	campai	gn									
C	hoose	File	File	Name			Campaig	1		1.	Dia	aling M	lode			Zone Dialing Pattern				
	<b>D</b>									1						[				
	Вго	wse	File I	Name			DEMO			-		uto			>	Plain Mode		2		
	New										-				/					
	Existi	ting	Lead	Name	_	_		0%	0					4			-/			
		. NI-		iak an D	rowoo buttoo		o Enter	the lear	t nam	•	Sol	loct the	dialin	mode		Select Plain mode	e 5.			
	ata Set	. 110	2. to	select t	he csy file		3. for se	elected f	le	~	Sei	lect the	ulaini	ig mode		for normal dialing	S			
			10	Sciectio	ne covine															
<b>C</b>	RM cs	sv form	at:																	
	Δ	B	C	D	F	F	G	н	1	1	C 1	0.0	N	O P O	R	S T II V M				
	phone	Nome	Address	Condor	Loot Dowmont	Dien	Storopomo	Location	State	DOR						5 1 0 0 0				
	phone	Isamo	Address	Gender	Lastr ayment	1 Ian	Storemanne	Location	otate	000			2 23				-			
4	2002	XXX	XXX			XXX	XXX	***	XXX	XXX										
3	XXXX	XXX	XXXX	XXXX	XXX	XXX	XXXX	XXXX	XXXX	XXXX					-		_			
4	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX										
-																				
														Click	on Link	and button				
														CIICK	on opi	bad button				
																6.				
																Uploa	d	Cancel		
<b>C</b> 4	4. E.		1.				•		4			C1	•		:					•
Step	4: F1r	rst sei	ect th	e cam	paign the	n use	er is sup	posed	to c	reate	a cs	sv file	e via	excel sl	neet 1	n same format a	accoi	raing to	cam	paign
CD	<b>f</b>		4 : 4	ا - نام ما	 		-	-										2		
CKN	n mer	ntione	a in ti	ne aia	log 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

pload (csv) file.		pattern, then enex on	uploud outton	×
Note: Only crm field with first colum	n heading (phone).	Dialing Mode	Zone Dialing Pattern	
Browse C:\fakepath\client.cs © New © Existing Data Set: No	0%	Auto	v Plain Mode	•
CRM csv format:	E G H I J	K L M N O P Q	R S T U V W X	•
XXXX XXXX XXXX XXXX XXXX XXXX XXX	XXXX         XXXX         XXXX         XXXX         XXXX           XXXX         XXXX         XXXX         XXXX         XXXX           XXXX         XXXX         XXXX         XXXX         XXXX		,	
			Upload	Cancel
p8: After click on upload bu	tton, a popup window will	ask a confirmation me	ESSage.	rich
CAMPAIGN MANAGEMENT - Comparing - CIMP Configuration - CIMP Configuration	Laad Hame Die wed (coo) Hie Sote: Only com field with first column heading (pho	ling Plade Zone Dailing Pattern	Action E	1
Gamping Transfer mapping     Callback - Re schedde     Email Template     Email Template     Effat Greeplate     Fito Gragory	Choose Trile Name Browse C. Strategrath Charles Set No Data Set: No	Dialing Mode	Zone Dialing Pattern	
Number Das Hund d     Uarer Magazing to DDD     Sand Shap Magaing     LEAD MANAGEMENT     Insport Lead	CRU cay format and an analysis Candar Last Tayron Canada and an analysis Candar Last Tayron Canada and analysis Canada analysis and analysis Canada analysis analysis Canada analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis analysis an	H         J         H         A         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H         H		
Assign Lead     Lead Manager     OCARA Data	Click on Ok button		Upload Cancel	
p9: Once ok button is clicke	d, then percentage progress	s bar shows as 100%		
CAMPAIGN MANAGEMENT CAMPAIGN MANAGEMENT Company CETM Configuration CETM Configuration CETM Configuration	Local Harvar VestT	Dialing Pinde Zone Dialing Pattern (Auto) Plain Model	our Alerts	Search
Mapping     Campaign Transfer mapping     Campaign Transfer mapping     Callsche Te schedule     Cange Template     Shift Template     Phil Catagory	Orbital Control Contro Control Control Control Control Control Control Control Control Co	e). ign Dialing Mode x Auto 100% VVhen it or Cross	Zone Dialing Pattern Plain Mode Shows as 100% then click on Cancel button to close the dialog box	9
Abusic On Hold     User Mapping OtD     SMS Disp Mapping     LEAD MANAGEMENT     Insport Lead     A satisf. Lead	A         B         C         D         E         F         G           Phonel Name         Address Genedic-Last Payment Pan. Storename         Storename <td< td=""><td>H         J         K         L         M         H         O         F           Location         State         DOD                 F                                                                                                   <td< td=""><td>Q R S T U V W X</td><td></td></td<></td></td<>	H         J         K         L         M         H         O         F           Location         State         DOD                 F <td< td=""><td>Q R S T U V W X</td><td></td></td<>	Q R S T U V W X	
Clead Manager     CRID Data     Callbook Assign     Callbook Assign     OTHER MANAGENENT     Free Agent     Free Agent			Upboad Cancer	
p10: Then click on Cancel of	r Cross 🙁 button to close t	he dialog box		
p11: Now in the import lead	page, it is evident that the	lead is uploaded. Now	v to be proceed with im	porting of the uploaded
Campaign Lead Name	Dialing Mode	Zone Dialing Pattern Action		
urst1	(200502)			
		Click on this icon to import le	ad	



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

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

Import lead (test1)	
Lead mode	Auto
Retry Type	Manual
Total rows:	2 Change the retry type, if required
Duplicate check from lead	guantity of rows shows in lead
Duplicate check from master	✓ If ticked , it enables prevention of importing
Transfer to main !	duplicated number present in the lead
Dnd Check	If ticked, it enables prevention of importing of duplicated
Activate/Deactivate	If ticked, it enables prevention of importing DND number for dialing
	If ticked, then lead activated for dialing
	Click on Import button Import Close

## Step14: Select the field as shown in above picture

Step15: At last click on Import button

			Your Alerts 💿 🛛 🧔 d	
CAMPAIGN MANAGEMENT				
o Campaign				
CRM Configuration				
Campaign Queue				
• Mapping	Import lead (test1)			
• Campaign Transfer mapping		Import ?		
• Callback - Re schedule	Lead mode			
Email Template	Retry Type			
<ul> <li>SMS Template</li> </ul>	Total rows:	OK Cancel		
• File Category	Duplicate check from te	ad 🔽		
<ul> <li>Music On Hold</li> </ul>	Duplicate check from master			
o User Mapping to DID	Transfer to main !			
<ul> <li>SMS Disp Mapping</li> </ul>	Dnd Check	E3		
- LEAD MANAGEMENT	Activate/Deactivate			
<ul> <li>Import Lead</li> </ul>				
Assign Lead				
<ul> <li>Lead Manager</li> </ul>				
o CRM Data				
o Callback Assign				

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:

Import lead (test1)		
Lead mode	Auto	•
Potry Type	AAnnun	
Reuy Type	Manua	t l
Total rows:	2	Import(2) done
Duplicate check from lead	<b>V</b>	Duplicate lead(0).
Duplicate check from master	1	Duplicate master(0).
Transfer to main !		Transfer done(2).
Dnd Check		
Activate/Deactivate		

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



## 2.1.a.42 Assign Lead

Campaign

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

6		≡ SMART DIAL**	* Vour Alerts 🐽 🧔 demo - 🔾 Bearch	
-	•	CAMPAIGN MANAGEMENT	Campaign* DEMO UB C RC	
-03	:	Campaign     CRM Configuration	ASC O DESC Select Order By     Enter Paralistic Value	
C.		Campaign Queue	Assign to Agent Select Agent CASSign	_
		• Mapping	# Campaign Agent Assign Attempt Lead phone Call Disart Dispositon Attempt Lead Dispositon Attempt Lead Dispositon Attempt Disposition Disposition Disposition Name Address Gender Payment Play Storename Location	State D
-		<ul> <li>Campaign Transfer mapping</li> </ul>		
_		• Callback - Reschedule		
_		• Email Template	3. Select the campaign Tick on checkbox to select, if required	
		<ul> <li>SMS Template</li> </ul>	Select the other fields	
- <b>-</b>		• File Category	parameter as required 4.	
Late		User Mapping to DID	Click on Show icon to view the data	
		Music On Hold		
<i></i>		o SMS Disp Mapping		
		- LEAD MANAGEMENT		
		• Import Lead	e	
		• Assign Lead		
		○ Lead Manager		
		a CRM Data		
1		o Callback Assign		

Step3: Then click on Show icon to view the data

-		,				1000												-		_	
<b>&gt;</b>	SMART DIAL														• 💿 🛛 🔕	) derr					
		Ca	impa	aign*	DEMO			- V IB	MC MC	E 6	RC										
	CAMPAIGN MANAGEMENT	Se	elect	Column					-	-			-	Enter Param	eter Value						
6	- CRM Configuration			ASC	0		DESC	Select Order	ву			-	Ent	er No of Reco	ord			-	-		
	Campaign Queue	Ast	sign	to Agent	13	hul		Assign	3. Cli	k or	n Assign	button									
	• Mapping	11						Load Name	Phone	Call	Dialer	Diater									
	Campaign Transfer mapping	1.	1000	DEMO	USER1	USER	2019-10-15	DEMO MANUAL	******	IB	1	ANSWERED	1	No Answer	No				aganone		
	• Callback - Reschedule		-				2020-02-08					ANSWERED			No						
- 1	Email Template	2.		DEMO	admin	admin	18:19:33	DEMO_MANUAL	****	IB	4	BY AGENT	3	No Answer	Subdisposition						
	SMS Template	З.	[	DEMO	admin	admin	2020-02-08	DEMO_MANUAL	****	IB	1	ANSWERED BY AGENT	1	No Answer	No Subdisposition						
	• File Category	4.		DEMO	admin		2020-04-17	test_5	*****	18	27	ANSWERED	21	CALLBACK		eti	rohini	corp	50000	255	rohin
	User Mapping to DID		1221	DEMO	admin		2020-05-03	test 6	******		6	ANSWERED	4	Sala	Hot Land		a animey	male	mehrauli	TV	mac
=	Music On Hold		~				16:16:34					BY AGENT									
	o omo bisp mapping																				
	- LEAD MANAGEMENT	1.1			_																
	o Import Lead			1	Tick	the ebe	ekhov to co	lost the data	2.												
	• Assign Lead				THUR	une cine	CKDOX to se	lect the data	Select	the	agent to	assign									
	optit Dess	1																			
	o Caliback Assign																				
	OTHER MANAGEMENT																				
	<ul> <li>Free Agent</li> </ul>																				

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!"



_			
0			% Your Alerta (0) (2) demo ~ Q Search
	CAMPAIGN MANAGEMENT	Campaign* DEMO VIB C RC	
	o Campaign	Select Column	Enter Parameter Value
-08	o CRM Configuration	ASC      DESC Select Order By	Enter No of Record
00	Campaign Queue	Assign to Agent rahul - Assign	
-	• Mapping	# Campaign Agent Assign Attempt Lez	Dialer Agent Agent Disposition Disposition Name Address Gender Payment Plan Sto
1	Campaign Transfer mapping	1. DEMO USER1 USER1 2019-10-15 DE Are you sure want to Assign it.	ANSWERED 1 No Answer No
	Callback - Re schedule	2020-02-08	ANSWERED . No
	<ul> <li>Email Template</li> </ul>	2. DEMO admin admin 18:19:33 DE	BY AGENT 3 No Answer Subdisposition
	SMS Template	3. DEMO admin admin 2020-02-08 DE OK Cancel	ANSWERED 1 No Answer No Subdisposition
	• File Category	4. E DEMO admin 2020-04-17 test_5 XXXXXXXX IB 27	ANSWERED 21 CALLBACK eti rohini corp 50000 255 roh
	User Mapping to DID	2020-05-03 + + + 0	ANSWERED
	Music On Hold	5. DENO admin 16:16:34 Test_o	BY AGENT 4 Sale Hot Lead Sanjaev male mentauli 10 ma
	<ul> <li>SMS Disp Mapping</li> </ul>		
	LEAD MANAGEMENT		
	Import Lead		
	Assign Lead	Click on Ok button	
	Lead Manager	*	
	CRM Data		
	Callback Assign		
	OTHER MANAGEMENT		
	Free Agent		
	e Email Inbox		

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" subsub menu to enable appearance of `Lead Manager` Page

and ID		<b></b>									
	Dialing Mode	Zone Mode	Lead Set	Dialing Table	DNC	To Dial	Active	/Deactive	Current St	atus Ac	tion
	[	1. Select the campaign	2. Click on lead dat	this icon to s a for selected	how the campaign						
m2. First s	alact the con	nnaign from o	ampaign	mbo box							
:p2. rnst s	elect the can	npaign nom e	ampaign co								
ep3: Then o	click on sear	ch icon to sho	w the lead	data for s	elected	campaig	gn				
mpaign DEMO		▼ P									
Lead ID	Dialing Mode	Zone Mode	Lead Set	Dialing Table	DNC	To Dial	Active/Deactive	Current Status	Action		~
Campaign Name :- d	lemo										
test1	Auto	▼ Plain Mode	2			. 8		Φ	-		
		_									
test_again	Auto	<ul> <li>Plain Mode</li> </ul>	3			-		¢	- 📋		
test_again	Auto	✓ Plain Mode	3		•		1	Ø	-		
test again <u>Iteration</u> ep4: Select mpaign DEMO	of mode for	or existing I mode from dro	<sup>3</sup> Lead: op down	·		· E	3	\$	• •		
test again <u>Iteration</u> ep4: Select mpaign DEMO Lead ID	of mode for the dialing r	Plain Mode     Prexisting I mode from dro     Zone Mode	3 Lead: op down	- Dialing Tabl	- DNC	- To Dial	Active/Dea	¢ ctive Currer	• 🔋	tion	
test again <u>Iteration</u> ep4: Select mpaign DEMO Lead ID Campaign Name	of mode for the dialing r Dialing Mode	Plain Mode     Prove the second	3 Lead: op down	- Dialing Tabl	e DNC	- To Dial	Active/Dea	¢ ctive Currer	- 0	tion	*
test again <u>Iteration</u> ep4: Select mpaign DEMO Lead ID Campaign Name : missedq_994_202000	of mode for the dialing r Dialing Mode demo 204 Auto	Plain Mode	3 Lead: op down Lead Set	- Diating Tabl	- <b>DNC</b>	To Dial	Active/Dea	¢ ctive Currer	<ul> <li>It Status</li> <li>Accention</li> </ul>	tion	*
test again <u>Iteration</u> ep4: Select mpaign DEMO Lead ID Campaign Name :- o missedq_994_202000 test1	of mode for the dialing r Dialing Mode demo 904 Auto	Plain Mode	3 Lead: op down Lead Set	Dialing Tabl	e DNC	To Dial	Active/Dea	¢ ctive Currer Ø	• 🗿	tion	
test_again <u>Iteration</u> ep4: Select mpaign DEMO <u>Lead ID</u> <u>Campaign Name</u> missedq_994_202000 test1 test_again	of mode for the dialing r Dialing Mode demo Sol Auto Auto Progressive	Plain Mode	3 Dep down Lead Set	Dialing Tabl	<ul> <li>DNC</li> <li>-</li> <li>-</li> <li>-</li> <li>-</li> <li>-</li> <li>-</li> <li>-</li> </ul>	To Dial	Active/Dea	¢ ctive Currer ¢ 0	t Status Ac	tion	
test_again <u>Iteration</u> ep4: Select mpaign DEMO Lead ID Campaign Name :- missedq_994_202000 test1 test1 test_again	of mode for the dialing r Dialing Mode demo Sold Auto Auto Progressive	Plain Mode	3 <u>Lead:</u> pp down Lead Set 1 2 3	Dialing Tabl	- DNC	To Dial	Active/Dea	¢ ctive Currer	• 0 t Status Ac 1 • 1	tion	



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

Can	paign DEMO		-	٩							
4											-
- 1	missedq_994_20200504	Auto		Plain Mode	1	1	0	. 4	¢ 1		
2	test1	Progressive	-							8	
3	test_again	Auto	-	Change	e mode ?						
			C	Click on Ok but	Canc	el					

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

Cam	paign DEMO	•								
									Action	^
	missedq_994_20200504	Auto 👻	Plain Mode	1	1	0	1	¢ 1		
	test1	Progressive	Plain Mode	2	-	-	-	•	ä	
3	test_again	Auto 👻	Plain Mode	3	-	-	-	<i>•</i>	Ö	

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

Can	paign DEMO	•								
	missedq_994_20200504	Auto 👻	Plain Mode	1	1	o	1		¢ 1	
	test1	Progressive	Plain Mode	2	-	-	. /		•	
	test_again	Auto 👻	Plain Mode	3	-	-	. /		<b>\$</b> -	<b>a</b>
					_					
					т	ick on che	ckbox to act	ivate lead		

# Delete Lead:

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





C	amp	DEMO		-							
		missedq_994_20200504	Auto	-	Plain Mode	1	1	0	1	Ø 1	
		test!	Progressive	-							8
		test_again	Auto	-	Delete ( tes	t1) lead ID ?.	Q				
					ок	Cance	el				
				_	1						
				Clic	k on ok button						

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

0	≡ SMART DIAL <sup>™</sup>		🐐 Your Alerts 🛛 🕕	🙆 demo -	Q Search	
	CAMPAIGN MANAGEMENT     Genergain     Child Configuration     Child Configuratio     Child Configuratio     Child Configuratio     Child Configur	Click on this icon to s data for selected cam	Vour Alerts	(C) demo -	Q Bearch	Z

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

Camp	aign DEMO 🗸 🔎		Click the a	k on setting icon auto retry configu	to reset uration		
#						Reload Disposition	
1	missedq_994_20200504	May 4, 2020 22:09	1	Plain Mode	Autometic		•
2	test1	May 4, 2020 08:10	2	Plain Mode	Manual	<ul> <li>N</li> </ul>	
3	test_20	May 2, 2020 15:24	2	Plain Mode	Manual	<ul> <li>•</li> </ul>	
4	test_again	Apr 26, 2020 19:21	3	Plain Mode	Manual	<ul> <li>Image: Image: Ima</li></ul>	
	test_cepl	Apr 26, 2020 17:59	4	Plain Mode	Manual	<ul> <li>•</li> </ul>	6
	test_2020	Apr 26, 2020 12:01	1	Plain Mode	Manual		•
			Click the a	on this icon to re gent disposition	eload	Click on thi the dialer d	is icon to reload lisposition



## **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

load agent disposition (test_cepl)			×
Disposition/Sub Disposition Name		Total	<u>~</u>
Hangup			
Agent Hangup		1	
Customer Hangup		1	
Sale			
Hot Lead		1	
tal		3	
1.     disposition/si       Reloading ?       2       2       2       2       2	ub-disposition leckbox as required Click on Reload bu	tton to reloa	+
'	selected disposition	n/sub-dispo	sition
	3.	Reload	Cancel

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

Dialer Disposition/Agent	Jain Disposition Name	Total	-
		Total	
NOT ATTEND	WATT TIME	11	
Hangup		1	
Sale		1	
ANSWERED BY AGENT			
Hangup		1	
Total		4	
Reloading ?     Delete duplicate     Activate ?     Dnd Check ?	n checkbox to select the dia tick/untick checkbox as req Click on Reload but the selected dialer	uired tton to reload disposition	
-	the selected dialer	Beload Ca	nc



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 bicon to export the full data of lead

Camp	aign DEMO 🗸 🔎						
						Reload Disposition	
	missedq_994_20200504	May 4, 2020 22:09	1	Plain Mode	Autometic		•
	test1	May 4, 2020 08:10	2	Plain Mode	Manual	<ul> <li>N</li> </ul>	•
					Click the fu	on this icon to export I data for 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

Car	npaign DEMO 👻 🔎						
#						Reload Disposition	
1	missedq_994_20200504	May 4, 2020 22:09	1	Plain Mode	Autometic		•
2	test1	May 4, 2020 08:10	2	Plain Mode	Manual	<ul> <li></li> </ul>	•
	Click on Ok button	te crm data (test1). rm report will be available afte	r deletion. ancel			Click on Delete icon	
St bi	ep3: After clicking on delete icon, atton	a pop message a	asking a	confirmation	as "Delete C	RM Data (xx	xxx)" with
~							

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" subsub menu to enable appearance of "Callback Assign" Page

*	CAMPAIGN MANAGEMENT	Maked on N/R Call Back Schedule By Agent Meased on ACD AP Erest SMS
1 08	CRM Configuration	
۲»	Campaign Queue     Mapping	Select Company Date Type Promidate To date
	• Campaign Transfer mapping	Assigned Date Vocusion Vocusion 20
	Caliback - Re schedule     Email Template	To View the data Please select the above fields !
	• SMS Template	
1 22	Music On Hold	
Land.	User Mapping to DID     Other Mapping	
	LEAD MANAGEMENT	
	• Import Lead	
	Assign Lead     Lead Manager	
	CRM Data	
-	• Caliback Annigh	
The ca	illback assign page	consists of following Tab
	Assign Tab –	This part facilitates admin user to manually assign callbacks to agent.
	U U	
	If lead source cr	eated for source type (API/Email/Missed On IVR/Missed On ACD/Callback scheduled by Agent) and
	C 11 1	
	fields are selecte	a stollows:
	Lead stores in –	Callback
	A set of Delie	Manual
	Assign Policy -	Manual
	If data compared	ar any source, then that data shows in that source time of Assign Tab
	II data comes ic	any source, then that data shows in that source type of Assign 1 ab.
	Stan1 · Consider	the steps as above to open the callback assign page
	Step1. Consider	the steps as above to open the canback assign page.



Assign Preview	View			Select the date r 2.	ange
Campaign DEMO	Created By Select Here	Call Type Select Here	Assigned Date	From date 2020-04-01 00	To date 2020-05-06 00
Select th	1. ne campaign		Cli	ick on View icon to show the	data 3.
Show 10 - entries					
Phone	DEMO	Call Type	admin	17-Apr-2020 10:55:00 AM	17-Apr-2020 10:57:48 AM
7998121121					

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

campaign				7	
Save					
Click on Save button		Select the opt	ion as campaign/	agent	
of: Select the option as car	nnaign/agent_t	en click on S	ave button		
o6: Select the option as car	npaign/agent, tl	nen click on Sa	ave button		
o6: Select the option as car	npaign/ag <mark>ent, tl</mark>	nen click on Sa	ave button		
o6: Select the option as car	npaign/ag <mark>ent, tl</mark>	nen click on S	ave button	8	
o6: Select the option as car	npaign/ag <mark>ent, tl</mark>	nen click on S	ave button	8	
06: Select the option as car Assign Agent Rahul Singh (rahul)	npaign/ag <mark>ent, tl</mark>	nen click on S	ave 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.

Missed on IVR Call Bac Assign Preview	k Schedule By Agent Miss	ed on ACD API Ema	ail SMS			
Campaign 1	Created By	Call Type	Assigned By	Assigned To	Date Type	
DEMO	Select Here	- Select Here	Select Here	Select Here	Assigned Da	ate 💌
From date	To date					_
2020-05-07 00	2020-05-07 23			Click o	n View button3.	
how 10 → entries	2. Select t	he Date range				
Phone	Campaign	Call type	Created By	Callback Date & time	Created Date & time	Assigne
7998121121	DEMO		admin	17-Apr-2020 10:55:00 AM	16-Apr-2020 07:57:48 PM	admin
	1	1				+
howing 1 to 1 of 1 entries			4		Previous	1 Next
			Data shows I	here		

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.

Assign Preview	View			Select the date range
Campaign	Created By	Call Type	Date Type	From date To date
DEmo	Selectifiere	Schoerhold	Assigned Date	
/				Click on View button 3.
		Nothing to	o show right now.	
1. / Select the cam	paign		LE a	4.



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.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:

0	$\equiv$ SMART DIAL <sup>**</sup>	🕈 Your Alerts 💿 🛞 demo 👻 🔍 Search
*	<ul> <li>USER STATUS</li> </ul>	DEMO - Single Window - 14 Selected - 9 all selected - 13 all selected -
08	CUSTOMER QUEUE	#         Agent         Mic         Exten         Rgst         Agent Mode         Duration         Current Status         Cust. Phone         DID/TFN         Talk Time         MyQ         MC         OC         IC           ONCALL 0         RINGING 0         IDL 1         ERROR 0         OTHER 1         TOTAL 2         DEMO         D
C.		CALLBACK 0 ACTIVE LEAD 2 DIAL NUMBER 0 CALL WAIT 0 C 0 1 C kamal XXXXXXXXXXX 0 Manual 0 00:04:20 HANGUP XXXXXXXXXXX 0 00:06:22 0 0 0 0 2 Minibili XXXXXXXXXXX 0 Auto 0 0:04:20:13 READY 00:00:00 0 0 0 0
-		
-		
Littl		
		4

## Change Mode of User

Step1: When user shows on User Status page as follows:

								Current Status							
01	ICALL O R	INGI	NG 0 IDLE 1 ERI	ROR	0 OTHER 1 TO	TAL	2			D 2 DIAL NU	MBER 0 CALL	. WAI	<b>T</b> 0	Ģ	્ય
	🔄 kamal		· XXXXXXXXXXXXXX	•	Manual ©		00:04:20	HANGUP	XXXXXXXXXXXXXXXX	01176543210	00:16:22	0	0	ø	•
	🔄 nikhil		· XXXXXXXXXXXXXX	•	Auto 😃	•	03:30:13	READY			00:00:00	0	0	0	
				Clicl the "	c on agent mode Change Mode" di	label lialog	l to open box				Click on thi "Change M	s icon ode" d	to op ialog	en the box	*

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:

Change Mode
☐ nikhil ✓ kamal
to select the user
Select the mode
2.
Select Mode
Click on Change button
3.
Change

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:

DEMO		•	Single Window	▼ 1.	4 Selected	▼ 9 all	selecte	d! 👻	13 all	selected!	-			
					Current Status									IC
ONCALL 0 F	RINGING O IDLE 1 EF	RROR	0 OTHER 1 TOTA	L 2	DEN	NO		AD 2 DIA		BER 0 CA			R	c)
1 🕓 kamal	* XXXXXXXXXXXXXX	0	Manual O	00:0	4:20 HANG	UP XXXXX	XXXXXX	0117654	43210	00:16:22		0 0	O	0
2 🕓 nikhil		( •	Auto	03:3	0:13 READ	Y				00:00:00		0 0	0	0
					Click of the "L	on logout icon	to open	x						
						sgour osers	dialog be							
Step2: Th	en click on "log	gout	" icon to oper	n the `l	Logout User	rs` dialog	box							
Step3: "L	ogout Users" di	alog	g box appears	as fol	ows:									



Logout Users	×
I nikhil I kamal	
Tick on checkbox to select the user	
Click on Logout button	
Logout	

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:

		and the second se					
<b>@</b>	≡ SMART D	IAL <sup>*°</sup>			🕴 Your Alerts _ 🚺	🥑 demo 👻 🔍 Q Search	
*	SEARCH RECORDING	Campaign Select campaigns	Disposition     Select disposition	User	From Date 2020-05-07.00	To Date 2020-05-07 23	Number
08	TRANSFER LOGS	Dame Plant 10 Rows -	Hangup By		Min Duration (in	sec) Max Duration(in sec)	
~~	CONFERENCE LOGS	Page Size:					
C	DOWNLOAD LOGS	/					
æ	TL RECORDING	Select the car	mpaign			Click on this icon to show the recording	
	CF RECORDING				Select the date range		
2	- 100 Marco - 100						
ton?	· Salaat the an	manian data ranga	and other seer	ah aritaria ant	ion		
JUCD J	. Select the ca	impargn, date range	and other sear		1011		
Step4:	: After that cli	ick on view ico	n to show the r	ecording data	From Date	To Date	Number
step4:	: After that cli	ick on view ico	on to show the r	ecording data	From Date	To Date	Number
Step4:	: After that cli	ick on view ico Disposition Select disposition	on to show the r	ecording data	From Date 2020-05-03 19	To Date 2020-05-03 19	Number
Step4: ampaig DEMO	: After that cli	ick on view ico Disposition Select disposition Hangup By	n to show the r	ecording data	From Date 2020-05-03 19 Min Duration(in sec)	To Date 2020-05-03 19 Max Duration(in sec)	Number
Step4: Campaig DEMO Page Siz	After that cli	ick on view ico Disposition Select disposition Hangup By	n to show the r User Select use Select Har	ecording data	From Date 2020-05-03 19 Min Duration(in sec)	To Date 2020-05-03 19 Max Duration (in sec)	Number
Step4: ampaig DEMO	: After that cli gn ze: <sup>10 Rows</sup> • Disposition <sup>©</sup>	ick on view ico Disposition Select disposition Hangup By Recording Time <	n to show the r User Select Use Select Har	ecording data	From Date 2020-05-03 19 Min Duration (in sec) Size RID	To Date 2020-05-03 19 Max Duration (in sec) Hangup by	Number
Step4: Campaig DEMO	: After that cli gn ze: 10 Rows Disposition CALLBACK	ick on view ico Disposition Select disposition Hangup By Recording Time 2020, May 03 07:53:48	n to show the r User Select Use Select Har Duration	ecording data	From Date 2020-05-03 19 Min Duration(in sec) Size RID 200503195348	To Date 2020-05-03 19 Max Duration (in sec) Hangup by 5009350158582	Number D M Actio
Step4: Campaig DEMO	After that cli gn ze: 10 Rows Disposition CALLBACK CALLBACK	ick on view ico Disposition Select disposition Hangup By Recording Time 2020, May 03 07:53:48 2020, May 03 07:49:03	n to show the r User Select Use Select Har Duration PM 00:00:22 PM 00:00:25	ecording data	From Date 2020-05-03 19 Min Duration (in sec) Size RID 200503195348 200503194903	To Date 2020-05-03 19 Max Duration (in sec) Hangup by 5009350158582	Number Actio Lister Lister
Step4: Campaig DEMO Page Siz	: After that cli gn ze: 10 Rows Disposition CALLBACK CALLBACK CALLBACK	ick on view ico Disposition Select disposition Hangup By Recording Time 2020, May 03 07:53:48 2020, May 03 07:49:03	n to show the r User Select use Select Har Duration PM 00:00:20 PM 00:00:25	ecording data er • ngup By •	From Date 2020-05-03 19 Min Duration(in sec) Size RID 200503195348 200503194903 200503194903	To Date 2020-05-03 19 Max Duration (in sec) Hangup by 5009350158582 7609350158582	Number

## 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



Campaig	n		Disposition	User	From Dat	te To Date	Number
DEMO		-	Select disposition	Select user	· 2020-05-	03 19 2020-05-03	19
Page Siz	e: 10 F	Rows 👻	Hangup By Tick on check select the reco	ox to rding	← Min Dura	ation(in sec) Max Durati	ion(in sec)
##	<b>V</b>	Campaign 🛇					Call Type
1		DEMO	admin (006)	demo		XXXXXXXXXXXX	MC 2.
2		DEMO	admin (006)	demo		XXXXXXXXXXX	MC TID :
3		DEMO	admin (006)	demo		XXXXXXXXXX	MC Click on ZIP Icon
4		DEMO	admin (006)	demo		XXXXXXXXXX	MC
5		DEMO	admin (006)	demo		XXXXXXXXXXXXX	MC
6		DEMO	admin (006)	demo		XXXXXXXXXXX	MC
7		DEMO	admin (006)	demo		XXXXXXXXXX	MC E
8		DEMO	admin (006)	demo		XXXXXXXXXXX	MC
9		DEMO	admin (006)	demo		XXXXXXXXXX	MC
10		DEMO	admin (006)	demo		XXXXXXXXXXX	MC
Total R	ecord F	ound : 12		vious 1 2 next			

Step6: After clicking on ZIP icon, a dialog box appears as follows:

Zip Recording			×
Zip File Name			
May_7_2020_1	81143		
Click on ZIP Re	1. cording button	Change the file nam if required	e,
	۷.	Zip Recording	
Step7: Enter the ZIP Step8: After clicking	file name, then click o on "ZIP Recording" b	on "ZIP Recording" button button then its gives the optic	on as f
Opening May 7 2020 18	1143.zip	×	
You have chosen to on	en:		
May_7_2020_181	1143.zip		
which is: Compre	essed (zipped) Folder		
from: http://118.	185.181.194		
What should Firefox d	o with this file?		
© Open with Win	ndows Explorer (default)	▼	
Save File			
Do this <u>a</u> utomati	cally for files like this from r	now on.	
		OK Cancel	
		Calleer	
	<u> </u>		0.01
Step9: Select the Sav	e file option and click	t on Ok button to save the ZII	' file
Export Search Re	cording data		
Stop 1 . When recording	na data wiawaan aaaral	h recording near than alight	n En
Step I: When recordu	ng data view on search	h recording page then click c	m Ex



Campa	ign	Disposition	User		From D	ate	To Date	Number
DEMO	-	Select disposition	▼ Select user	-	2020-05	5-03 00	2020-05-03 19	
Page S	ize: 10 Rows 👻	Hangup By	Select Hangup I	By 👻	Min Du	ration(in sec)	Max Duration(in sec)	
	CALLBACK	2020, May 03 07:53:48 PM	A 00:00:20	33 KB		20050319534850	09350158582	Liste
	CALLBACK	2020, May 03 07:49:03 PM	00:00:25	40 KB		20050319490376	09350158582	Liste
	CALLBACK	2020, May 03 07:36:42 PM	A 00:00:12	20 KB		20050319364259	59350158582	Liste
							Click on this icon the data in excel	to export

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

Campaign	From Date	To Date	Number	Page Size
Select campaigns	2020-05-07 00	2020-05-07 23	Number	► C A 10 Rows ▼
1. Select the campaig	n Select the c	ate range	Click of the tra	3. on this icon to show ansfer recording
Step3: Select the campa	ign and date range			
Step4: After that click of	on view 📩 icon to	show the transfe	er log data	
Download Single R	ecording			
Step5: As we click on "	RID" label then it	provide the optio	on for Open/Save the	e recording
Download ZIP Rec	ording			
Step5: Tick on checkbo	ox to select the reco	rding file, then c	lick on ZIP icon	
Step6: After clicking or	n ZIP icon, a dialog	box appears as t	follows:	



Zip Recording	×
Zip File Name May_7_2020_181143	
1. Click on ZIP Recording button	Change the file name, if required
2.	Zip Recording

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:

ou have chosen t	o open:		
May_7_2020	_181143.zip		
which is: Cor	npressed (zipped) Folder		
from: http://	118.185.181.194		
Vhat should Firef	ox do with this file?		
Open with	Windows Explorer (default)		
Save File			
Do this <u>a</u> uto	natically for files like this from now on.		
	OK Cancel		
and the second sec			

# 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:







## 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:

Select comp		Agent		User		From Da	ite	To Date	Number	
Select cumpt	aigns y	Select agent	-	Select user	· •	2020-05	-07 00	2020-05-07 2	23	
Page Size		10 Rows 💌				2.				•
- <u> </u>	1./					Select t	he date ra	nge	3.	
Selec	ct the Campaign								Click on Vie	ew icon
1 1										
a. 2 a	1	1. 1	л	1	<i>.</i> .					
Step3: Se	lect the campaign	n, date range and o	ther sear	ch criteria	a option					
	1									
Step4 Af	fer that click on y	view 📩 icon to sh	now the I	Download	log data					
Stephini	ter that enter on a			20 Willoud	i log data					
Campaign	Security II	Agent		llsor		From Date	2	To Date	Number	_
Campaign	terra di	Agent		User		From Date	9	To Date	Number	_
Campaign DEM0	•	Agent Select agent	•	<b>User</b> Select user	•	From Date 2020-05-0	e 7 00	To Date 2020-05-07 23	Number	
Campaign DEMO Page Size	•	Agent Select agent 10 Rows	•	<b>User</b> Select user	•	From Date 2020-05-0	e 7 00	To Date 2020-05-07 23	Number	3
Campaign DEMO Page Size	- Agent ID	Agent Select agent 10 Rows Phone Number	Vser (IP)	User Select user	RID	From Date 2020-05-0	e 7 00 Action	To Date 2020-05-07 23	Number	3
Campaign DEMO Page Size	Agent ID admin	Agent Select agent 10 Rows Phone Number XXXXXXXXXX	User (IP) admin (1.38.2	User Select user 44.171)	RID 2005031953485	From Date 2020-05-0 009350158582	e 7 00 Action Download	To Date 2020-05-07 23	Number	Э ► РМ
Campaign DEMO Page Size	Agent ID admin admin	Agent Select agent 10 Rows Phone Number XXXXXXXXXXX XXXXXXXXXX	User (IP) admin (1.38.2 admin (1.38.2	User Select user 44.171) 44.171)	RID 2005031953485 2005031953485	From Date 2020-05-0 009350158582 009350158582	e 7 00 Action Download Download	To Date 2020-05-07 23	Number	в рм РМ

## Export Download Logs data

Step1: When recording data view on Download Logs page, then click on Export icon

DEMO Page Size	▼ Se	lect agent	<ul> <li>Select user</li> </ul>	2020.05		
Page Size			· Detect user	₹ 2020-05-	2020-05-07 2	3
	10	Rows -			Click on this icon to exp	ort data
admin	1 <b>)</b>	5 XXXXXXXXXXX	admin (1.38.244.171)	2005031953485009350158582	Download	2020, May 07 06:06:44 PM
admin	ı )		admin (1.38.244.171)	2005031953485009350158582	Download	2020, May 07 06:06:43 PM

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:

Campaign Select campaigns 1. Select the campaign	From Date 2020-05-07 00 2. Select the da	To Date 2020-05-07 23 ate range	Page Size	10 Rows V	a. 3. ick on this icon	
Step3: Select the campaign and da	ate range					
Step4: After that click on view	icon to show th	e TL Recording d	ata			
Download Single Recording	5					
Step5: As we click on "RID" labe	l then it provide t	the option for Ope	n/Save the rec	cording		
Download ZIP Recording						
Step5: Tick on checkbox to select	the recording file	e, then click on ZI	P icon			
Step6: After clicking on ZIP icon Zip Recording Zip File Name	a dialog box a <mark>pp</mark>	pears as follows:	×			
May_7_2020_181143 Click on ZIP Recording bu	1. Ch if re 2.	ange the file na equired	ame,			
Step7: Enter the ZIP file name, th	en click on "ZIP	Recording" buttor	1			
Step8: After clicking on "ZIP Rec	cording" button th	nen its gives the op	otion as follow	vs:		





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:

Campaign	From Date	To Date	Number	Page Size	
Select campaigns 🛛 🔻	2020-05-07 00	2020-05-07 23		10 Rows -	• • •
1. Select the Campaign	2. Select	the Date range			3. Click on this icon

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:

Campai	ign	User	Fro	om Date	To Date	Logout Option	1	Report 1	уре			
Select	campaigns	Select users	• 20	20-05-08 00	2020-05-08 23	Logout Time	•	Consolio	late		•	
Selec	1. ct the Campaign	2. Select the user	] [	3. Select the D	Date range	S	elect th	4. ne report	type	5. Click or to show	n View id v the dat	con ta
Step3	: Then select th	ne campaign, use	er, report type	e and date	e range							
Step4	I: After that clic	ek on view 📩 is	con to show t	the user's	s log data on par	nel as follo	ows:	Report	уре			
		kamal	▼ 20.	20-05-06 00	2020-05-06 23	Logout Time	•	Consoli	late 🔹	• 🕨	0	
##	Agent ID	Agent Name	Campaign	20-05-06 00	2020-05-06 23	Logout Time	ogout	Consoli	late	Duration		Mod
##	Agent ID	Agent Name	Campaign	20-05-06 00	2020-05-06 23 First Login	Logout Time Last L	• .ogout	Consoli	late Login (	Duration		Mod
## DEMO	Agent ID	Agent Name	Campaign	20-05-06 00	2020-05-06 23 First Login	Logout Time Last L	• .ogout	Consoli	Login (	Duration		Mod
## DEMO 1	Agent ID kamal (097)	kamal     Agent Name     kamal	Campaign DEMO	20-05-06 00	2020-05-06 23 First Login 6th May 2020 07:05:13 PM	Logout Time Last L 6th May 2020	• .ogout 0 07:05:4	Consoli 7 PM (	Login ( 0:00:34	Duration	<u>00</u>	Mod :00:34
## DEMO 1 Total	Agent ID kamal (097)	kamal     Agent Name     kamal     kamal	Campaign	20-05-06 00	2020-05-06 23 First Login 6th May 2020 07:05:13 PM	Logout Time Last L 6th May 2020	• .ogout 0 07:05:4	Consolia I7 PM C	Login ( 0:00:34 0:00:34	Duration	<u>00</u>	Mod :00:34 :00:34
## DEMO 1 Total	Agent ID kamal (097)	kamal     Agent Name     kamal     kamal	Campaign DEMO	20-05-06 00	2020-05-06 23 First Login 6th May 2020 07:05:13 PM	Logout Time Last L 6th May 2020	• .ogout 0 07:05:4	Consolii 17 PM C	Login I 0:00:34 0:00:34	Duration	<u>00</u>	Mod :00:34 :00:34
## DEMO 1 Total	Agent ID kamal (097)	kamal     Agent Name     kamal     kamal	Campaign DEMO	20-05-06 00	2020-05-06 23 First Login 6th May 2020 07:05:13 PM	Logout Time Last L 6th May 2020	• .ogout 0 07:05:4	Consolii 17 PM C	Login [ 0:00:34 0:00:34	Duration	<u>00</u>	Mod :00:34 :00:34
## DEMO 1 Total Step5	Agent ID kamal (097) 5: When data sh	<ul> <li>kamal</li> <li>Agent Name</li> <li>kamal</li> <li>kamal</li> <li>ows on user sess</li> </ul>	Campaign DEMO	20-05-06 00	2020-05-06 23 First Login 6th May 2020 07:05:13 PM	Logout Time Last L 6th May 2020	• .ogout 0 07:05:4	Consolii 17 PM C	Login I 0:00:34 0:00:34	Duration	00	Mod :00:34 :00:34
## DEMO 1 Total Step5	Agent ID kamal (097)	kamal     Agent Name     kamal     kamal     ows on user sess     on export icon	Campaign DEMO	ck on exp	2020-05-06 23 First Login 6th May 2020 07:05:13 PM port  cicon	6th May 2020	• .ogout 0 07:05:4	7 PM (	Login I 0:00:34 0:00:34	Duration	00	Mod :00:34 :00:34
## DEMO 1 Total Step5 Step6	Agent ID kamal (097) 5: When data sh 5: After clicking	<ul> <li>kamal</li> <li>Agent Name</li> <li>kamal</li> <li>kamal</li> <li>ows on user sess</li> <li>on export icon,</li> </ul>	Campaign DEMO	ck on exp	2020-05-06 23 First Login 6th May 2020 07:05:13 PM port  icon open/save the da	Logout Time Last L 6th May 2020	• ogout 0 07:05:4	consolut 17 PM ( c	Login ( 0:00:34 0:00:34	Duration	00	Mod :00:34 :00:34



# 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:





Step4: After that click on view 上 icon to show the queue log data on panel as follows:

Campai	gn							Date									_	-				
DEMO								2020	05-03									5				
DEMO [3	Brd May,	2020]																				^
12 AM	1 AM	2 A M	3 A M	4 A M	5 A.M	6 A.M	7 AM	8 A M	9 A M	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM	10 PM
Offered	Mered Calls : Z																					
<u>o</u>	<u>o</u>	<u>o</u>	<u>0</u>	<u>o</u>	<u>o</u>	<u>0</u>	<u>o</u>	<u>o</u>	<u>o</u>	<u>o</u>	<u>o</u>	<u>o</u>	<u>0</u>	<u>o</u>	<u>o</u>	4	<u>o</u>	1	2	<u>o</u>	<u>0</u>	<u>o</u>
Answere	ed Calls : )	Z				Answei	red Rate :	100.00				Hangup	By Custo	omer [6]	Hangup B	y Agent [	1] Transf	er Call [0	1			
<u>o</u>	<u>o</u>	<u>o</u>	<u>0</u>	<u>o</u>	<u>o</u>	<u>0</u>	<u>o</u>	<u>o</u>	<u>o</u>	<u>o</u>	<u>o</u>	<u>0</u>	<u>0</u>	<u>o</u>	<u>o</u>	4	<u>o</u>	1	2	<u>o</u>	<u>o</u>	<u>o</u>
Abandon	ned : <u>0</u>					Abando	on Rate :	0.00														
Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q
Manual	Call : <u>38</u>											Hangup	By Custo	omer [7]	Hangup B	y Agent [	8]					
Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q	1	<u>11</u>	2	Q	2	Q	3	<u>11</u>	1	Q	Q
Transfer	r Call : 0																					
0	0	Q	Q	Q	Q	0	0	Q	Q	Q	Q	0	Q	Q	0	Q	Q	Q	Q	0	Q	0
Confere	nce Call :	0																				
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
																						-
•																						•

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:

Detailed Information				×
# Campaign	Date Time	Phone Number	Action	
1 demo	3rd May 20, 04:11:19 PM	XXXXXXXXXXX	Hangup By Customer	
2 demo	3rd May 20, 04:12:27 PM	XXXXXXXXXXX	Hangup By Customer	
3 demo	3rd May 20, 04:15:36 PM	XXXXXXXXXXX	Hangup By Customer	
4 demo	3rd May 20, 04:16:56 PM	XXXXXXXXXX	Hangup By Customer	
5 demo	3rd May 20, 06:33:56 PM	XXXXXXXXXX	Hangup By Agent	
6 demo	3rd May 20, 07:00:05 PM	XXXXXXXXXX	Hangup By Customer	
7 demo	3rd May 20, 07:09:24 PM	XXXXXXXXXX	Hangup By Customer	
Total Record Found: 7			Export	
		Click on Export button		

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:



Campaign	Disposition	User F	rom Date To Date	Page Size:	Report Style	
Select the campaign	Select the disposition	Select the user	Select the date range	Click on view to show the da	icon Click on + i ata more filter o	con to add
I Step3: Then select th Step4: After that clic	ne campaign, disposition	, user, date range, how the dispositio	report style and ad n log data on panel	d more filter as follows:	option throug	gh + icon
Campaign	Disposition	User	From Date	To Date	Page Size:	Report Style
DEMO	Select disposition	▼ Select users	✔ 2020-05-03 00	2020-05-08 22	10 Rows -	Single Sheet I -
## Campaign 🗢	Lead	Agent ID 🛇	Agent Name	<sub>Sip</sub> ¢	Pre	efix O Pho
1 DEMO		kamal (097)	kamal	xxxxx xxxxx		9999
3 DEMO	DEMO_MANUAL	nikhil (147)	Nikhil	XXXXXX		9716
4 DEMO	DEMO_MANUAL	rahul (130)	Rahul Singh	xxxxx		9313
5 DEMO	DEMO_MANUAL	rahul (130)	Rahul Singh	XXXXXX		8076
6 DEMO	DEMO_MANUAL	kamal (097)	kamal	xxxxx		9811
7 DEMO	DEMO_MANUAL	kamal (097)	kamal	XXXXXX		9266
8 DEMO	missedq_994_20200426	admin (006)	demo	XXXXXX		9313
9 DEMO	test_6	admin (006)	demo	XXXXX		7998
Step5: When data sh Step6: After clicking 2.1.a.60 User Sess	ows on Disposition Rep g on export icon, it gives sion Graph	ort page, click on the option to open	export 🖻 icon h/save the data in e	x <mark>cel she</mark> et		
This mechanism ena	bles to `View` the sumn	nary of users in fo	rm of graphical inte	erface.		
Step2: "User Session	n Graph" page appears a	s follows:	n Oraphi suo mene	L		
Campaign	From Date To	Date	Display Type			
-Select-	2020-05-08 00     20       Horizontal Axis (1st Level)     Ho       -Select Horizontal Axis Leve ▼     -S	rizontal Axis (2nd Level) elect Horizontal Axis Leve 🗸	-Select Display Type-	7		
4. Select the building type as Count/AHT/Talk time/Idle	1. 2. Select the campaign Sele	ct the date range	3. Select the disp as Bar/Line/Pr	e 5. Clici the g	k on View icon to sh graphical data on pa	now
Step3: Then select th	ne campaign, date range.	, display type, buil	ding type and add	other search o	criteria option	IS


Step4: After that click on view 上 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:

<b>Step3:</b> Then select the campaign, date range and add + icon to add more filter option 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 i icon Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet <b>La.62 CRM Report</b> 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: <b>Step2: "CRM Report" Step3: Then select the campaign in add date range and ranget state.</b>	Campaign	From Date To Date			
Image: Select the campaign       Image: Select the date range         Step3: Then select the campaign, date range and add + icon to add more filter option         Step3: 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.         Step2: "CRM Report"         Step2: "CRM Report"         Image: The campaign	Select campaigns	2020-05-08 2020-05-	08	+	
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 <b>2.1.a.62 CRM Report</b> 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: 22020 00 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	1. Select the campaign	2. Select the date range	4. Click on view icon to show the data	3. Click on + icon to add more filter option	
Step3: Then select the campaign, the range and add + icon to add more finder option 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: 1000000000000000000000000000000000000	Stan 2. Than salast the same	noign data range and add Liese	to add more filter antion		
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 <b>2.1.a.62 CRM Report</b> 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: <b>Step3: Then calculat the comparison load, data range and ranget style.</b> Step3: Then calculat the comparison load, data range and ranget style.	steps. Then select the cam	pargn, date range and add + icor	i to add more inter option		
Step5: When data shows on Disposition Summary page, click on export  icon Step5: After clicking on export icon, it gives the option to open/save the data in excel sheet <b>2.1.a.62 CRM Report</b> 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: <b>Step3: Then calculat the company: Step3: Then calculat the company:</b>	Step4: After that click on v	iew 上 icon to show <mark>the data o</mark>	n panel		
Step6: After clicking on export icon, it gives the option to open/save the data in excel sheet <b>2.1.a.62 CRM Report</b> 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: 1000000000000000000000000000000000000	Step5: When data shows or	n Disposition Summary page, cl	ick 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:   ampaign  ampaign  before t load  combo box  before t load  combo box	T	, p.8., .	in provide the second		
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:	Step6: After clicking on ex	port icon, it gives the option to o	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: 1000000000000000000000000000000000000					
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: $\frac{ead}{edet the campaign} + ead + edet combo box + edet combo box + edet combo box + edet combo box + edet the campaign + edet the campaign + edet combo box + edet combo bo$					
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:					
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:	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:				<i>"</i>	
Step1: Go to "Analytics" menu => Then click on "CRM Report" sub menu Step2: "CRM Report" page appears as follows:	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 "CKM Report" sub menu Step2: "CRM Report" page appears as follows:					
Step2: "CRM Report" page appears as follows:	Step1: Go to "Analytics" m	enu => Then click on "CRM Re	eport" sub menu		
Step2:       CKINI Keport page appears as Iollows:         Campaign       Lead       From Date       To Date       Page Size:       Report Style         Select campaigns       Select Lead       2020-05-08 00       2020-05-08 23       10 Rows       Single Sheet       Image: Select lead         1       2       3       Select Date range       4       Select report style       5         2       3       Select Date range       Click on view icon to show       Click on view icon to show         Select the campaign       Select Date range       Click on view icon to show       Click on view icon to show         Stap2:       Than select the campaign       Lead       date range and ranget style       5	Star 1. "CDM Dan art"				
Campaign Lead From Date To Date Page Size: Report Style Select Lead 2020-05-08 00 2020-05-08 23 10 Rows Single Sheet 1 Single Sheet 1 Single Sheet 1 Single Sheet 1 Select 1 Select I at a specific the campaign Select Lead from lead combo box Select Date range Click on view icon to show the data on panel Starp 2: Than salest the comparison lead date range and ranget style	Step2: "UKM Report" page	e appears as follows:			
Select campaigns       Select Lead       2020-05-08 00       2020-05-08 23       10 Rows       Single Sheet I       Image: Comparison lead       Image: Comparison lea	Campaign Lead	From Date To	o Date Page Size: F	Report Style	
2.       3.         Select lead from lead combo box       Select Date range         Select the campaign       Click on view icon to show the data on panel         Stap2: Than salest the campaign lead, date range and report style	Select campaigns y Select L	ead 2020-05-08 00 2	020-05-08 23 10 Rows -	Single Sheet I	
1.       Select lead from lead combo box       3.       4.         Select the campaign       Select Date range       Select report style       5.         Click on view icon to show the data on panel       Click on view icon to show the data on panel					
Select the campaign lead, data range and report style	1. Select lead	from lead combo box Select Date range	je Selec	4. ct report style	
Stan 2: Than salest the comparison lead, date range and report style	Select the campaign			Click on view icon to show	
Stan2: Then select the comparison lead, date range and report style				the data on panel	
	Stan2. Than salast the same	naion lead date range and rang	rt style		



DEMO	-	Select Lead	-	From Date 2020-05-03 00	To Date 2020-05-07 23	Page Size: 10 Rows -	Report Style Single Sheet I -	
##	Campaign		Agent ID		Agent Name		Call Type	c
	DEMO		nikhil (147)		Nikhil		MC	2
	DEMO		rahul (130)		Rahul Singh		MC	2
	DEMO		rahul (130)		Rahul Singh		MC	2
	DEMO		kamal (097)		kamal		MC	2
	DEMO		kamal (097)		kamal		MC	2
	DEMO		kamal (097)		kamal		MC	2
	DEMO		admin (006)		demo		MC	2
	DEMO		kamal (097)		kamal		RC	2
	DEMO		admin (006)		demo		RC	2
	demo							2
•	m							

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:

Campaign	Lead	From Date	To Date		Page Size:	
-	7	2020-05-08 00	2020-05-08 23		10 Rows 👻	
	2.			A		
1	Select lead from	3.~		Click on view icon to	show the data	
	lead combo box	Select	Date range		onon the data	
Select the campaign						

Step3: Then select the campaign, lead and date range

Step4: After that click on view 上 icon to show the data on panel

Campa DEMO	nign	Lead	From Date 2020-05-05 00	To Date 2020-05-08 00		Page Size: 10 Rows -
	Campaign 🛇	Agent id ♦	Agent name	Call type 🛇	Crm update/dialing date t	ime 🗘 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
۰	m					
Total	Record Found : 15	previous 1 2 next				



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:

Campaign	Туре	Source	From	То	Dial Status	Page Size	
Select Campaign 🚽	Select Call Type 🛛 🔻	Select Source 🔹 👻	2020-05-08 00	2020-05-08 23	Select Dial Status 🛛 🔻	10 Rows 👻 🕨 🖸	1
						/	*
			$\langle \rangle$			/	
1.	2.	DUE 100	3.			4.	
Select the campaign	IVR/Missed on ACD	/Callback by Agent	Select the Date	e range		Click on view icon	

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

Camp DEM	aign O	Type • 6 all sel	lected!	Source     Select Source	From 2020-05-0	To 2020-05-04	Dial Status 3 23 Select Dial Status	Page Size 10 Rows	-	
	Phone	Campaign	Agent	Callback Category	Update Time	Update By User	Туре	Call Type	Disposition Sub	<b>c</b> ^
1	XXXXXXXXXXX	DEMO	ADMIN	ADMIN	05/05/2020 10:01	Admin	Callback Scheduled By Agent	MC		
2	XXXXXXXXXXXX	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	XXXXXXXXXXX	DEMO	ADMIN	ADMIN	03/05/2020 19:09	Admin	Callback Scheduled By Agent	IB		
Tota	al Record Foun	id: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:







From Date 2020-05-09 00	To Date 2020-05-09 23	Service vodafone	Time Resolution			
1. Select the Date range		2. Select the service provider	3. Select the slot	]	4. Click on view icon to show the data on panel	*

Step3: Then select the date range, service provider and slot as shown in picture

Step4: After that click on view 上 icon to show the data on panel

From Date	To Date	Service		Time Resolution		
2020-05-03 00	2020-05-09 23	vodafone	•	Day	•	
			T-s-1 Usili-ssi-s			
				Max ounzation	Min ounzation	Avg ounzation
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:

Campaign	From Date	To Date		
Select campaigns	2020-05-09	2020-05-09		+
1. Select the campaign	2. Selec	t Date range	4. Click on View icon to show the data on panel	3. Click on + icon to add more filter option
Step3: Then select the car	npaign, date range a	and click on + icon to a	add more filter option as show	wn in picture
Step4: After that click on	view 🕨 icon to sh	ow the data on panel		



C	amp DEM Call 1	o  Type  4 all	From Date 2020-05-03 selected!	To Date 2020-05-03		+
1	Hour	ly – 8 all	selected!	+ ×		
	1	demo	ОВ	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