

A User Guide On -

DeepCall Agents

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Agents



	7	Table (of I	Inde	ex

Table of Index			
S. No.	Title	Page No.	
1.	Agent List	6	
2.	- Add Agent	13	
3.	- Bulk Create Agent	15	
4.	- Bulk Update Agent	16	
5.	- Search By	17	
6.	Group List	19	
7.	- Add Group	20	
8.	- Group List Action	21	
9.	- Search By	22	
10.	Role	24	
11.	- Role List	25	

Table of Index			
S. No.	Title	Page No.	
12.	- Search By	26	
13.	Login Log	28	
14.	- Search By	30	
15.	Break List	32	
16.	- Breaks Add	33	
17.	- Search By	34	
18.	Break Log	35	
19.	- Search By	36	
20.	Break Report	37	
21.	- Heatmap and Line Chart	38	
22.	- Log and Counter Table	39	



1. AGENT

- Agent List
- Add Agent
- Bulk Create Agent
- Bulk Update Agent
- Search By

4. LOGIN LOG

- Login Activity
- Search By

2. GROUP

- Group List
- Add Group
- Search By

5. BREAKS

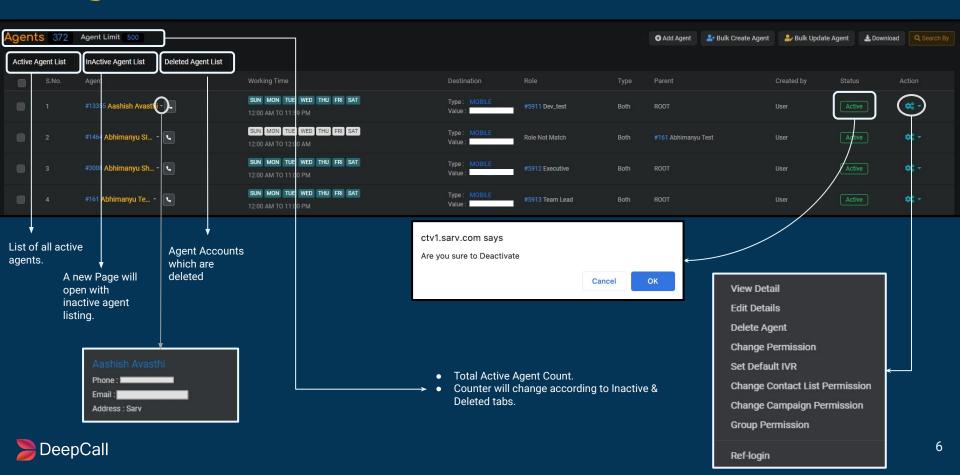
- List
- Log
- Report

3. ROLE

- Add Role
- Role List
- Search By



Agent List



Agents Status

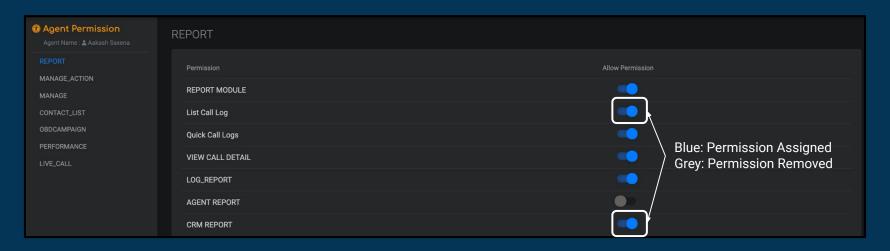
- Active: The agent is active in attending and making calls.
- **Inactive**: The agent is inactive & calls will not be passed to the agent.
- Deleted: Once deleted, the agent account cannot be reactivated.
 A popup will appear for final confirmation on deletion.

Agent Limit

- The default agent limit is set to 2.
- This limit can be changed as per the plan bought.

Action

- View Details
 - Already set details will be opened.
- Edit Details
 - The set details can be edited & saved again.
- Delete Agent
 - Click to Delete agent account.
- Change Permission- Agent Permissions
 - A list of all permissions for agents will open. Users can decide what permissions to apply & remove.





Set Default IVR for Agent

A list of IVRs created will open. Users can choose to apply the default IVR & change it at any point in time.





Contact List Permissio	n #136 Aakash Saxena	
S.No.	Permission	Allowed Permission
	All	••
	Hierarchy	••
	Created By Self	
	Assigned to Agent	
	Assigned to Role	••
	Assigned to Group	••

• Contact List Permission

- All: If enabled, the user will get permission for all the contact lists that are there in the panel.
- **Hierarchy**: If enabled, the user will get permission to access the contact list for the hierarchies below their level in the panel.
- Created By Self: If enabled, the contact list created by that particular user will be permitted to be used.
- Assigned to Agent: If enabled, users will get permission to access the contact list that is assigned to them.
- **Assigned to Role**: If enabled, the user will get permission to access the records for the roles that are assigned to them.
- Assigned to Group: If enabled, the user will get permission to access the group which includes selected Agents.



Campaign Permission #136 Aakash Saxena			
S.No.	Permission	Allowed Permission	
	All		
	Hierarchy + calls which are not assigned to anyone	•	
	Self + calls which are not assigned to anyone	en e	

- Contact List Permission
 - All: If enabled, then the user gets permission access for all the campaigns that are created in the panel.
 - **Hierarchy + Calls that are not assigned to anyone**: If enabled, user gets the permission for the campaigns for the hierarchies that are below his level and the calls which are not assigned to anyone.
 - **Self + Calls that are not assigned to anyone**: If enabled, user gets the permission to access the campaign list which are created by them and the calls which are not assigned to anyone.



Assign Group Permission to Agent #13355 Aashish Avasthi			
S.No.	Permission	Allowed Permission	
1	All	•	
2	Created By Hierarchy		
3	Created By Self		
4	Involve Self	•	
5	Involve Hierarchy	•	

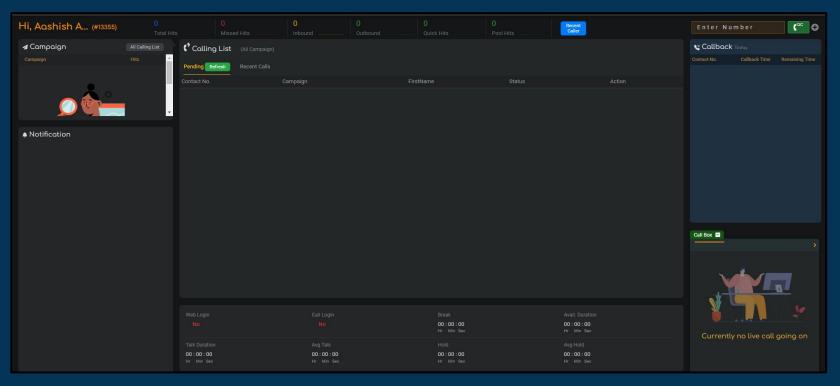
Group Permission

• A list of all group permissions to agents will open. Users can decide what permissions to apply & remove.



• Ref Login

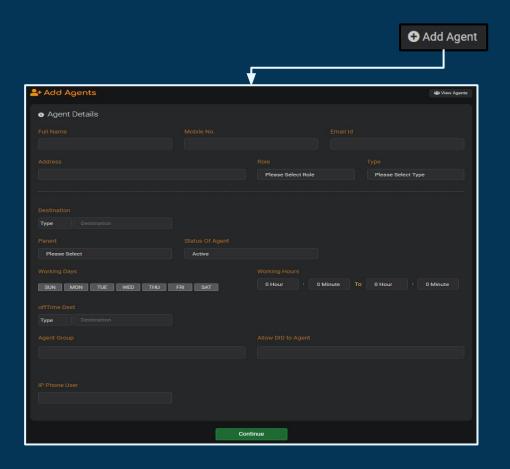
• User/Admin can click to log into any agent account via this option.





Agent - Add Agent

- Enter Agent details in the form in detail.
- Choose the role of Agent & assign a group.
- Type
 - Inbound (IBD)
 - Outbound (Campaign)
 - Both
- Destination
 - SIP, WebRTC, Mobile, Destination.
 - The call will land on this number.
- Working Day & Hours.
- offTime Dest(Destination)
 - SIP, WebRTC, Mobile, Destination.
- Assign DIDs to an Agent.
 - An agent can view reports of only assigned DIDs
 - This could be 1 or multiple.
- IP Phone User.





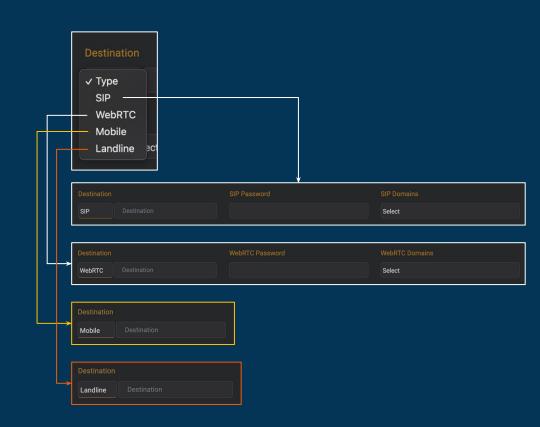
Agent - Add Agent - Destination

In Destination, Type has four options;

- SIP: Divert your calls to an IP softphone.
- WebRTC: Login using a password while eliminating multiple sessions.
- **Mobile**: Divert your calls to a mobile number.
- Landline: You can also divert your call to a landline.

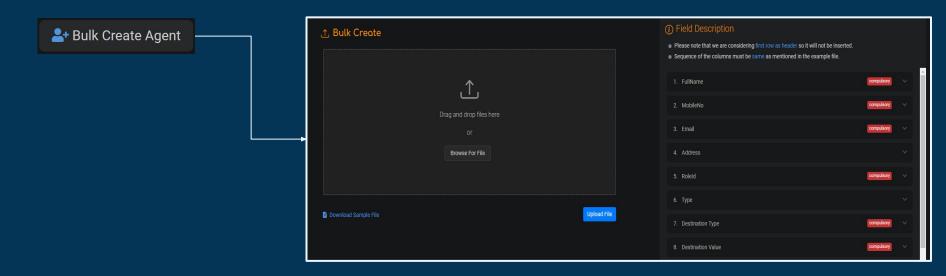
In offTime Dest(Destination), Type has same four options;

- SIP
- WebRTC
- Mobile
- Landline



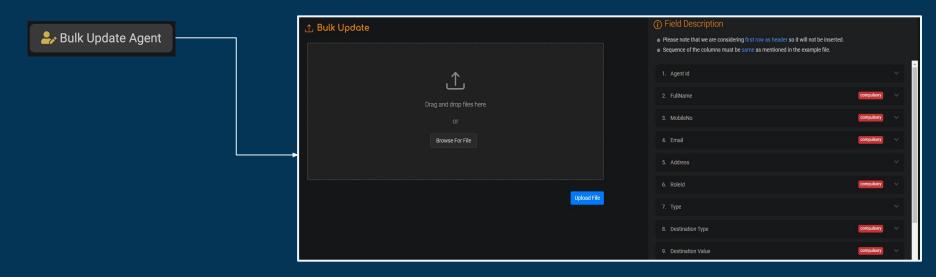


Agent - Bulk Create Agent



- To Bulk Create Agent, upload the CSV file by dragging and dropping or browsing the file with the compulsory fields shown in the above screenshot.
- You can download the sample file which is attached here, to get an idea.

Agent - Bulk Update Agent

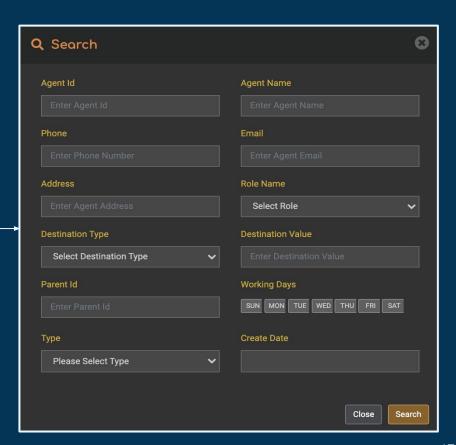


- To Bulk Update Agent, upload the CSV file by dragging and dropping or browsing the file with the compulsory fields shown in the above screenshot.
- You can download the sample file which is attached here, to get an idea.

Agent - Search By

Q Search By

- Here, the User can perform a search using parameters like - Agent ID, Agent Name, Phone, Email, Address, Role Name, Destination Type, Destination Value, Parent ID, Working Days, Type, and Create Date.
- User can search with one parameter or multiple parameters as well to refine their search.





Group

Group List



- Check out all the groups added to date.
- The agent column lists the names of agents added to each group.
- Created by & Create date with each group.

Status

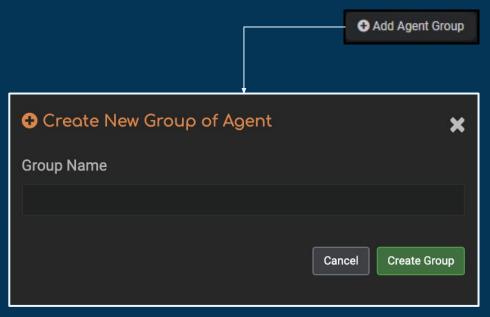
- Active
- Inactive

Action

- o Edit
- Assign Group to Agent



Group - Add Group



Users can enter their name and click on 'Create Group.'
The group will be created and added to the list.

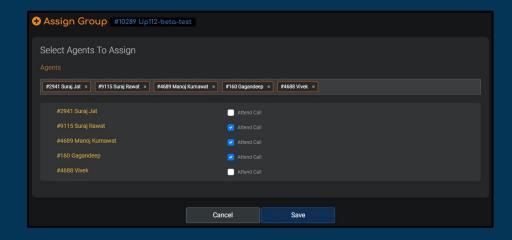


Group List - Action



Edit

• Rename your group.



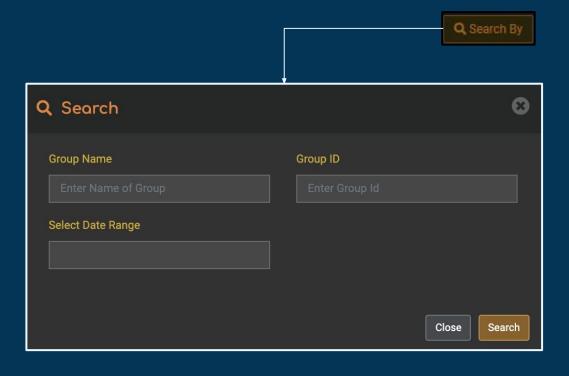
Assign Group to Agent/Select Agents to Assign

- Add and remove agents.
- Multiple selection.



Group - Search By

- Here, the User can perform a search using parameters like - Group Name, Group ID, and Select Date Range.
- User can search with one parameter or multiple parameters as well to refine their search.





Role



Role

Create Role:

Create a new role & choose what you wish the agents with this specific role to view in their account.

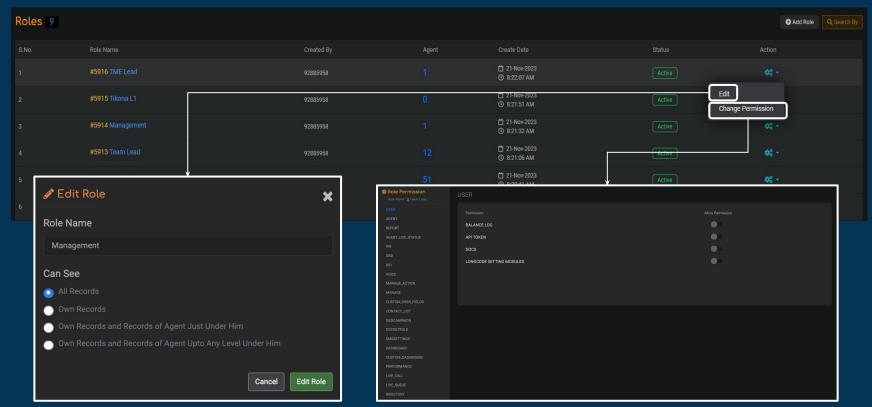
Can see

- All records: An agent with an assigned role can see all the records in the hierarchy.
- Own records: Can see only their account records.
- Own records & records of an agent just under him/her: Can see records of self and downline.
- Own records and records of agents up to any level under him/her: Can see records of all agents under it.





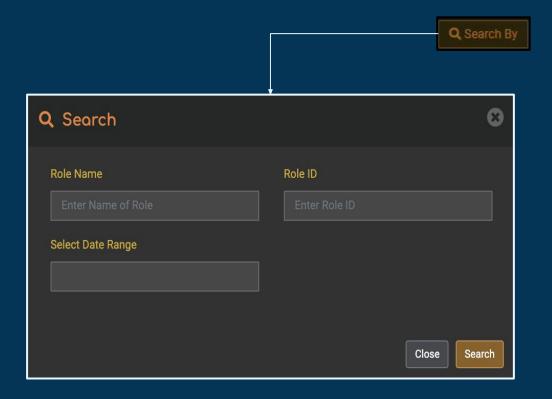
Role List





Role - Search By

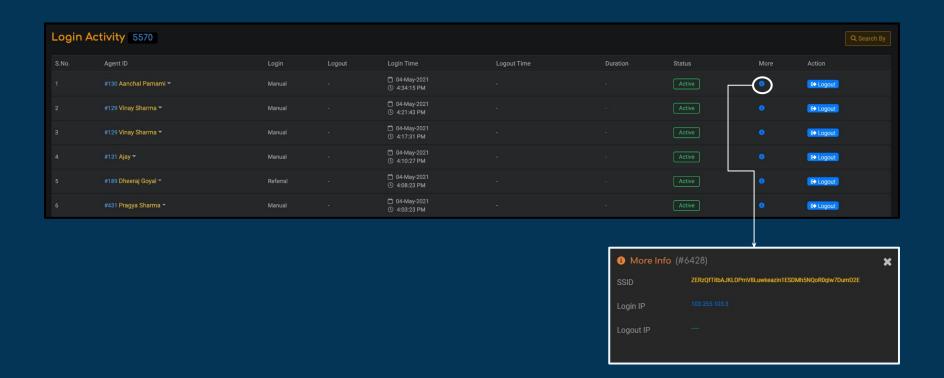
- Here, the User can perform a search using parameters like - Role Name, Role ID, and Select Date Range.
- User can search with one parameter or multiple parameters as well to refine their search.





Login Log

Login Log





These logs include

Login & Logout

- Manually: Agent logged in/out using unique login access.
- System: Ref. Login from the User/Parent account.
- Forcefully: The User/Parent account can forcefully log out of the agent.

Time/Duration

- Login Time: Agent login time details.
- Logout Time: Agent logout time details.
- Duration: Time duration between Agent Login and Agent Logout. In short total working hours of the agent.
- Status
 - Active: Click to change the status to Inactive.
 - o Inactive: Click to change the status to Active.

More

• IP Details of Agent System while Login & Logout.

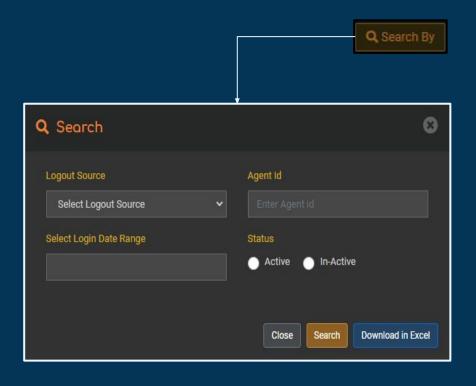
Action

• Logout: Click & confirm if the user wishes to log into the Agent account forcefully.



Login Log - Search By

- Here, the User can perform a search using parameters like - Logout Source, Agent ID, Select Login Date Range, and Status.
- User can search with one parameter or multiple parameters as well to refine their search.





Breaks



Break List



List

- Name of break
- Date & Time Created
- How many counts are allowed
- How much duration is fixed for each break
- What is the ending strategy
- Edit the break value via Action.

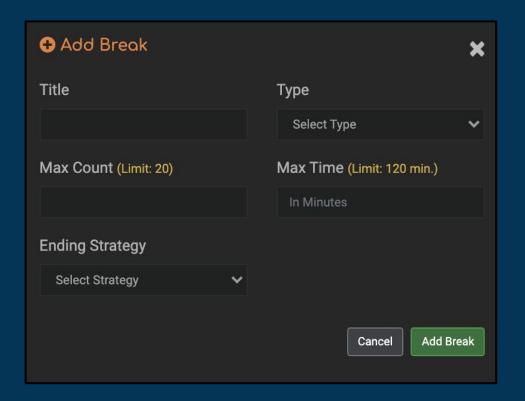
Search By

 Easy searching using parameters on the page.



Breaks - Add

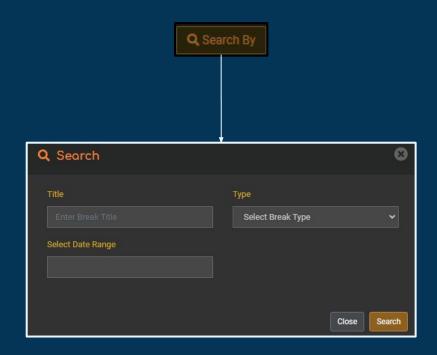
- **Title:** Add title as per the nature of your break.
- Type
 - Quality Break
 - Meal Break
 - Meeting Break
- Max Count: Up to 20 breaks can be taken.
- Max time: Breaks total duration is set to 120 minutes.
- Ending Strategy
 - Manual
 - Automatic (Till working Hours).
 - Automatic [End of the Day (Midnight)].
 - When Agent Logout





Break List - Search By

- Search By with existing parameters like Title, Type, and Select Date Range.
- User can search with one parameter or multiple parameters as well to refine their search.



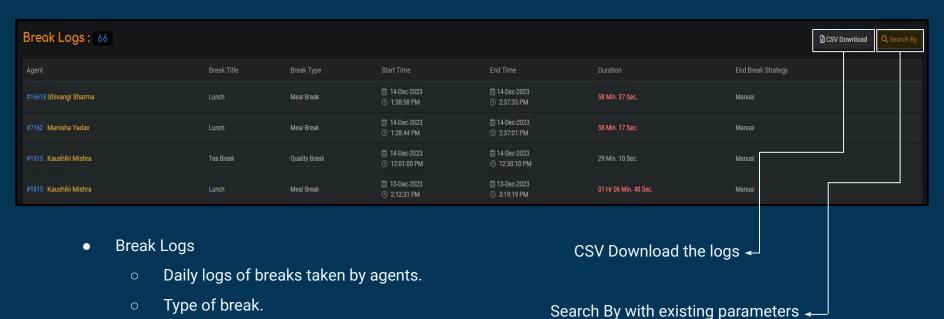


Break Log

Break Start time & End time.

Duration of break.

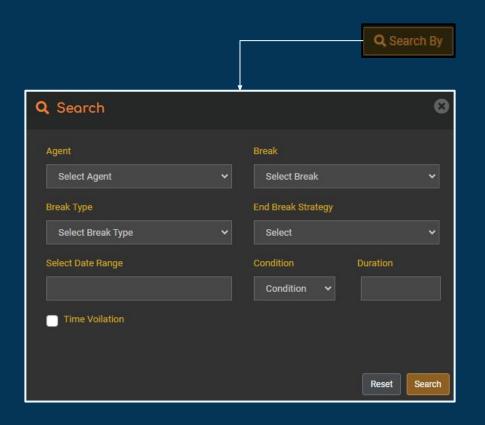
Break-end strategy.





Break Log - Search By

- Search By with existing parameters like Agent, Break, Break Type, End Break Strategy,
 Select Date Range, Time Violation, and
 Condition.
- User can search with one parameter or multiple parameters as well to refine their search.
- The condition has four options Equal To(=),
 Not Equal To(!=), Greater Than Equal To(>=),
 and Less Than Equal To(<=).





Break Report

The red line refers to the breaks taken: 4 Breaks in this case so 4 lines. If the single break is taken then the single line will display. Hover on each line to see the break type. The Length of the line is decided according to the duration of the break.



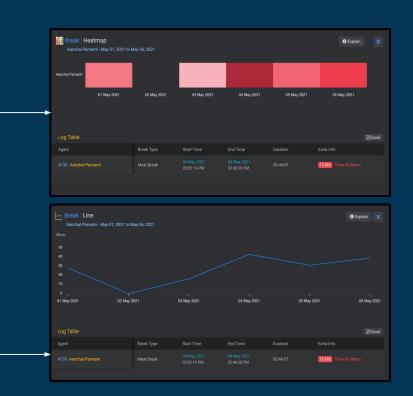


Heatmap & Timeline Chart

HeatMap Chart: Through the HeatMap Chart, the user can check the breaks taken during the "Date-Range" selected in a Color Coding Scheme for an individual.

Timeline Chart: Through the Timeline Chart, the user can check the breaks taken during the "Date-Range" selected in a Graphical Representation for an individual.







Log & Counter Table

Log Table: Through the Log Table, the user can see only the break data of the particular day it is taken, on which the date range is applied for an individual.

Counter Table: Through the Counter Table, the user can see the total time duration of all the breaks taken on that particular day, on which the date range is applied for an individual.

