DeepCall

A User Guide On -

Manage

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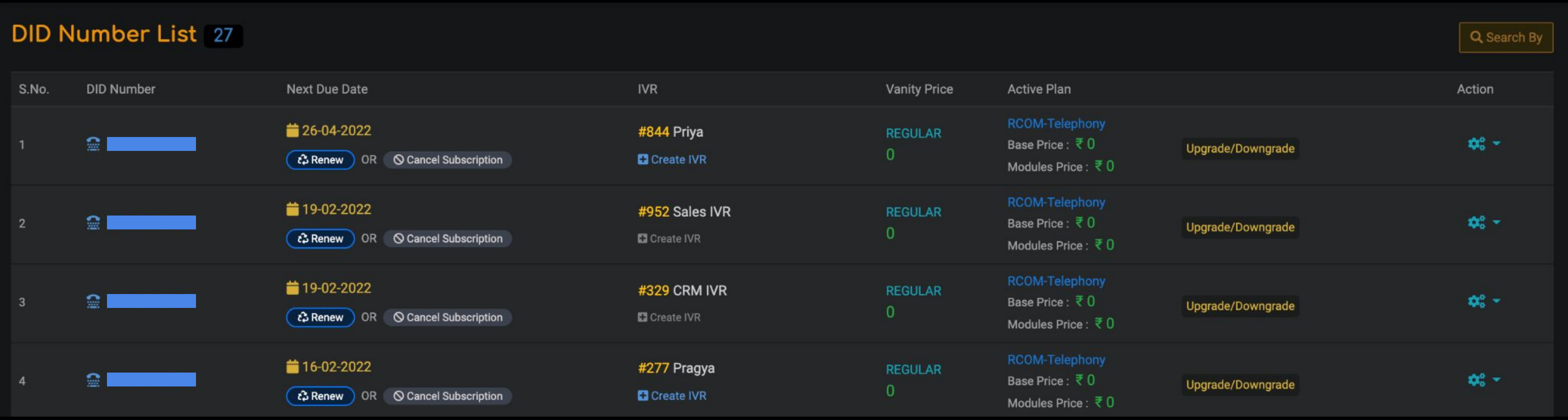
DID Numbers



DID Number List 27

Search By

S.No.	DID Number	Next Due Date	IVR	Vanity Price	Active Plan		Action
1	[redacted]	26-04-2022 Renew OR Cancel Subscription	#844 Priya Create IVR	REGULAR 0	RCOM-Telephony Base Price : ₹ 0 Modules Price : ₹ 0	Upgrade/Downgrade	
2	[redacted]	19-02-2022 Renew OR Cancel Subscription	#952 Sales IVR Create IVR	REGULAR 0	RCOM-Telephony Base Price : ₹ 0 Modules Price : ₹ 0	Upgrade/Downgrade	
3	[redacted]	19-02-2022 Renew OR Cancel Subscription	#329 CRM IVR Create IVR	REGULAR 0	RCOM-Telephony Base Price : ₹ 0 Modules Price : ₹ 0	Upgrade/Downgrade	
4	[redacted]	16-02-2022 Renew OR Cancel Subscription	#277 Pragya Create IVR	REGULAR 0	RCOM-Telephony Base Price : ₹ 0 Modules Price : ₹ 0	Upgrade/Downgrade	

DID Number

All the DIDs purchased by the user are visible under this column.

Next Due Date

- Renewal Date is displayed against each DID based on the plan purchase date.
- Renew Button: This is for instant renewal.
- Cancel Subscription Button: If the user wishes to discontinue the current subscription.

IVR

- Click on IVR ID & IVR Name to make any edits or view the existing flow.
- Create an IVR button to create a new IVR for that DID number and link it with the same.

Vanity Price

5 vanity types

- REGULAR
- SILVER
- GOLD
- DIAMOND
- PLATINUM

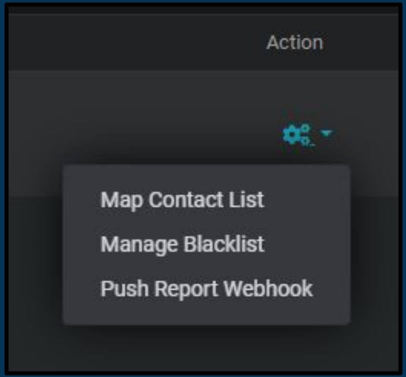
Every DID is of a different vanity type and hence differs in price according to the category in which they fall.

Active Plans

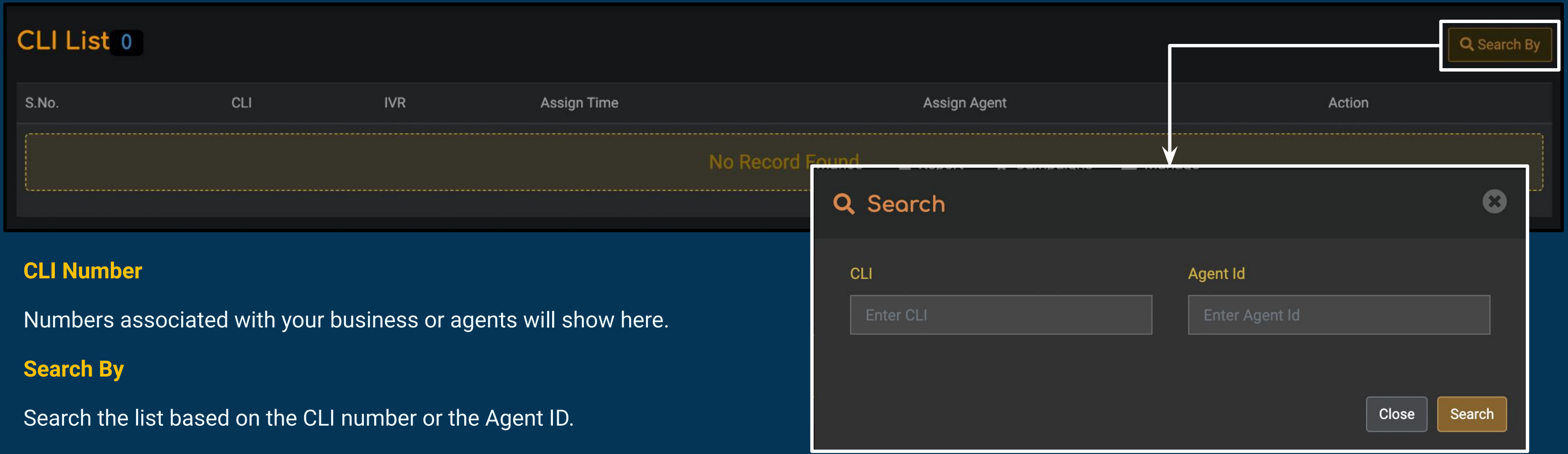
- Current Plan details like ‘Plan Name’, ‘Base Price’, and ‘Module Price’.
- Upgrade/Downgrade
    - Yes, Surrender Current Plan: After clicking on "Yes, Surrender Current Plan" XYZ/- will be refunded into your Wallet. You can use this amount in your future transactions.
    - Choose a new Plan: Once you surrender your current plan, the IVR assigned to DID will be disabled automatically.

Action

- “Map Contact List” lets the user map the existing contact list with the DID. Once mapped user/agent is able to add contacts to the contact list & data can be saved/edited/updated.
- Set Bunch Duration is the duration for which the Bunch ID will be fixed for the set interval of time. Example: If the user fixes the bunch ID for 48 hours, whenever the caller calls, its Bunch ID remains unchanged. Once the duration is over the new ID will be assigned by the system.
- Manage Backlist
    - Click to add any number in Blacklist.
    - Delete the record to remove it from the blacklist.
- Push Report Webhook
    - A report of the calls for the chosen DID number will be sent on the selected Webhook. You can also send a report on the Default Webhook that you have chosen for DID numbers.
- Search By to see for a specific DID record.



CLI Numbers



CLI Number

Numbers associated with your business or agents will show here.

Search By

Search the list based on the CLI number or the Agent ID.

Announcement

Announcements 20

Upload Voice | Text To Voice | Search By

S.No.	File Name	Id	Upload Date	Size	Duration	Voice File
1	cc test	1620208859_78.wav	05-May-2021 3:30:59 PM	67.99 kB	00:00:18	0:00 / 0:18
2	cc test	1620208776_60.wav	05-May-2021 3:29:36 PM	67.99 kB	00:00:18	0:00 / 0:18
3	Testing by Abhimanyu	1617712777_18.wav	06-Apr-2021 6:09:37 PM	43.54 kB	00:00:02	0:00 / 0:02
4	Sarv_welcome	1613799121_49.wav	20-Feb-2021 11:02:01 AM	147.66 kB	00:00:06	0:00 / 0:06
5	Ring	1612416080_78.wav	04-Feb-2021 10:51:20 AM	23.06 kB	00:00:06	0:00 / 0:06

File Name: Name of the Voice File.

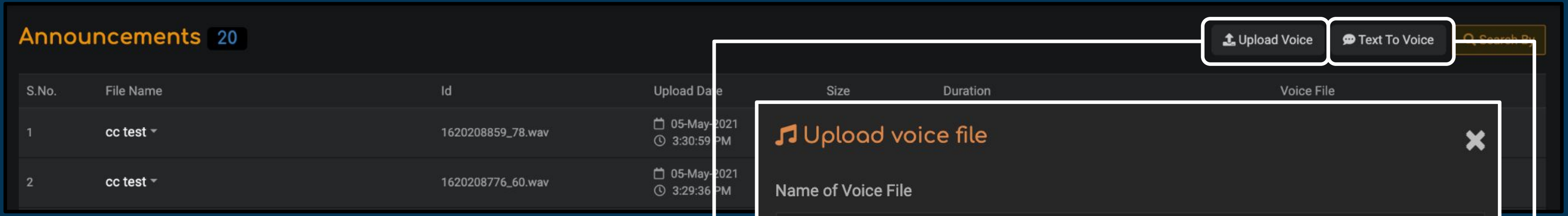
ID: Every voice file is assigned a unique ID which helps in mapping and searching.

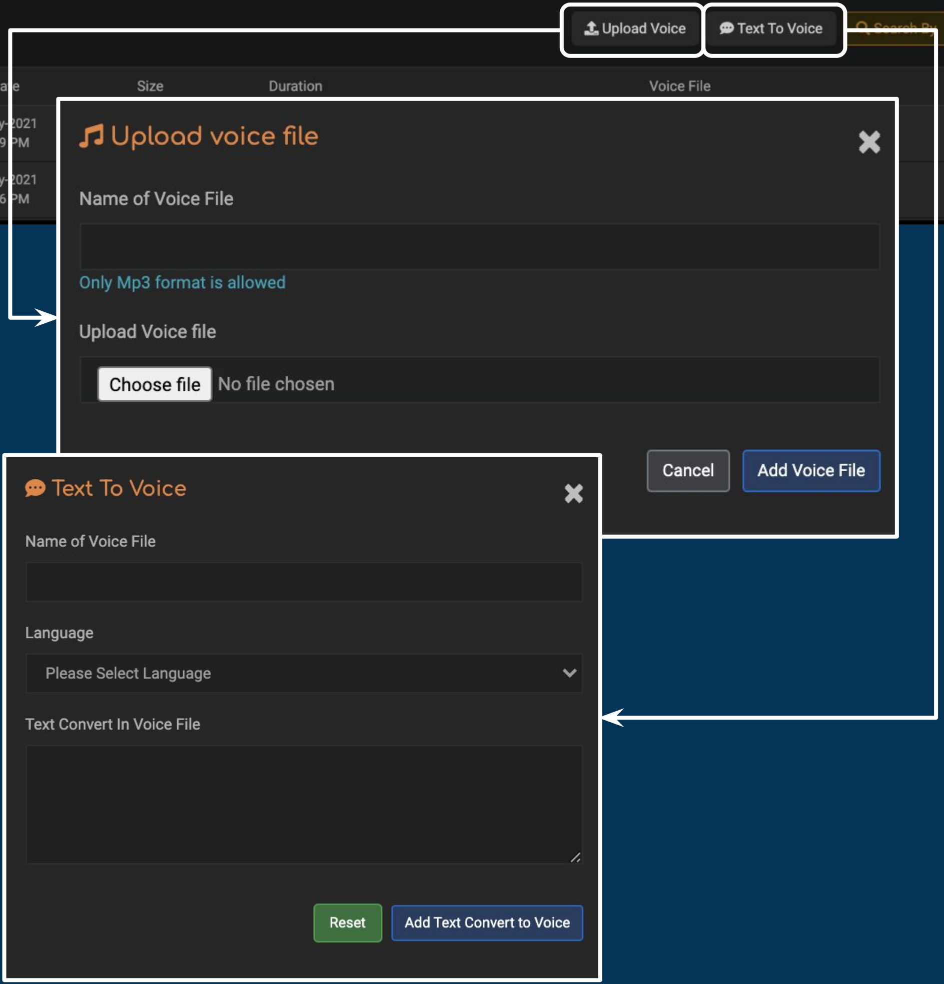
Upload Date: Date & Time of upload of voice file.

Size: Size of file uploaded.

Duration: Length of the voice file in terms of time duration.

Voice File: Play, Pause, FastForward, and Download the voice file.





Upload Voice

- Name your file.
- Browse the file from your system.
- The file should be in MP3 format.

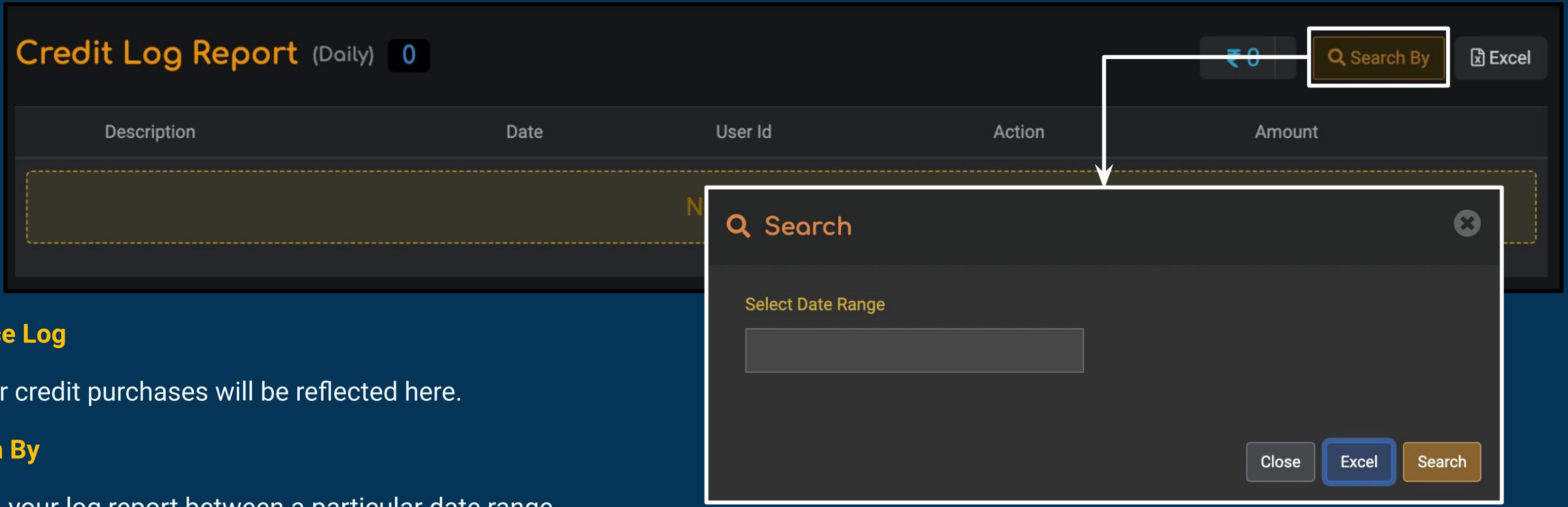
Text To Voice

- Name your file.
- Select the text language from the drop-down menu.
- Enter the text in the text field.

Search By

- Easy search of any file using File Name and Create Date.

Balance Log



Balance Log

All your credit purchases will be reflected here.

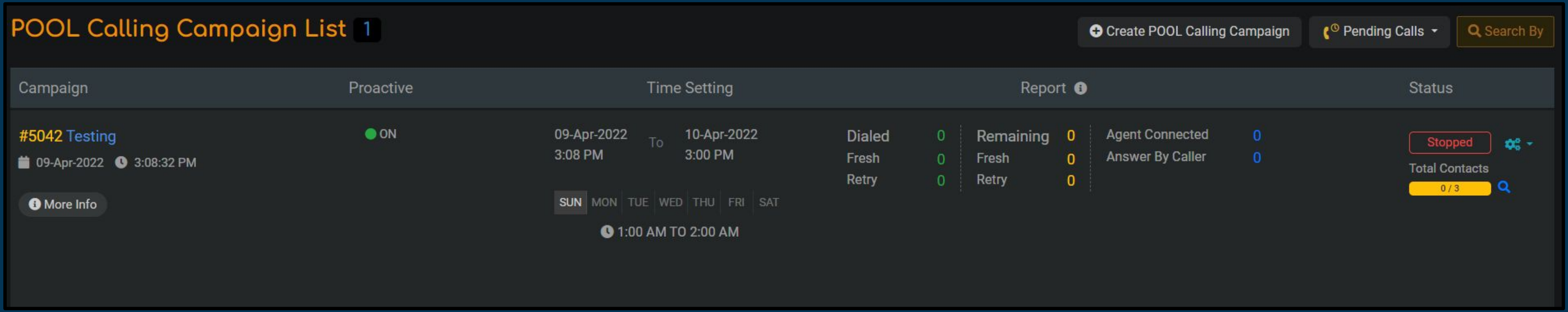
Search By

Search your log report between a particular date range.

Excel

Use this button to download the log report in the CSV format.

Pool Call



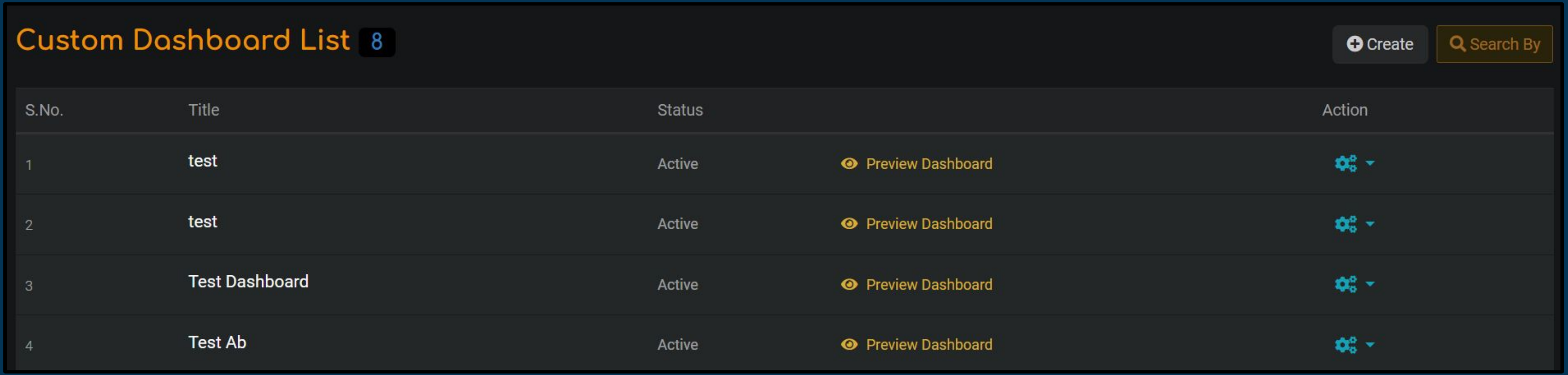
Pool call enables the agents to reach out to multiple audiences to deliver generic information. It saves time and ensures efficient customer service.

Our cutting-edge proactive pool calling algorithms analyze the running outbound campaigns predict the availability of agents in the foreseeable future and initiate calls so that the free available time of agents can be minimised.

Check your Pool Call Campaigns under this section. This section gives you a brief overview of all the campaigns. There are various segments for every campaign like **Campaign, Proactive, Time Setting, Report, and Status.**

You can perform the “Search By” function with the help of various sections like- Proactive, Campaign or Contact List, IVR, Deleted Campaign, Campaign ID, Campaign Title, Status, and Select Date Range.

Custom Dashboard

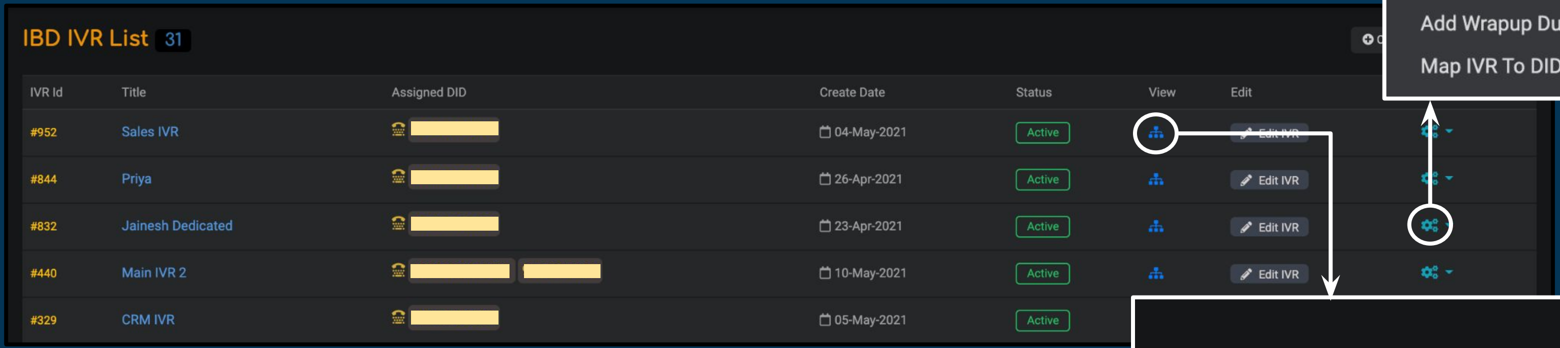


Custom Dashboard helps the users to create the Dashboard according to their needs and requirements, and what functionality they want to include in it for working.

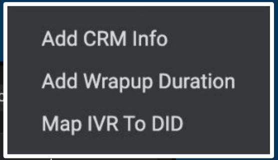
You can create the Dashboard and the Agent’s name who will have access to it.

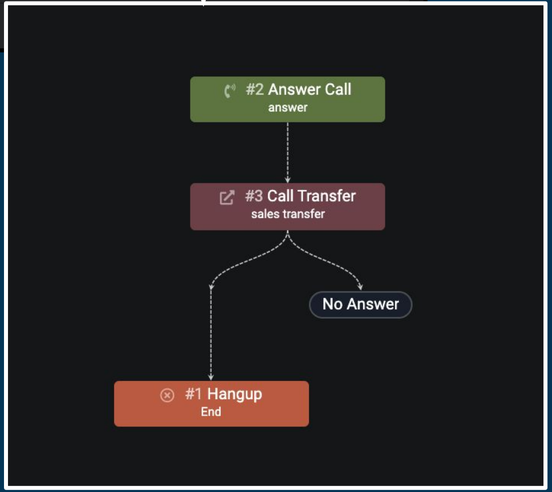
You can also perform the “Search By” function which can help to fetch the Dashboard based on Title.

IBD- IVR (Inbound IVR)


IBD IVR List 31

IVR Id	Title	Assigned DID	Create Date	Status	View	Edit
#952	Sales IVR		04-May-2021	Active		Edit IVR
#844	Priya		26-Apr-2021	Active		Edit IVR
#832	Jainesh Dedicated		23-Apr-2021	Active		Edit IVR
#440	Main IVR 2		10-May-2021	Active		Edit IVR
#329	CRM IVR		05-May-2021	Active		



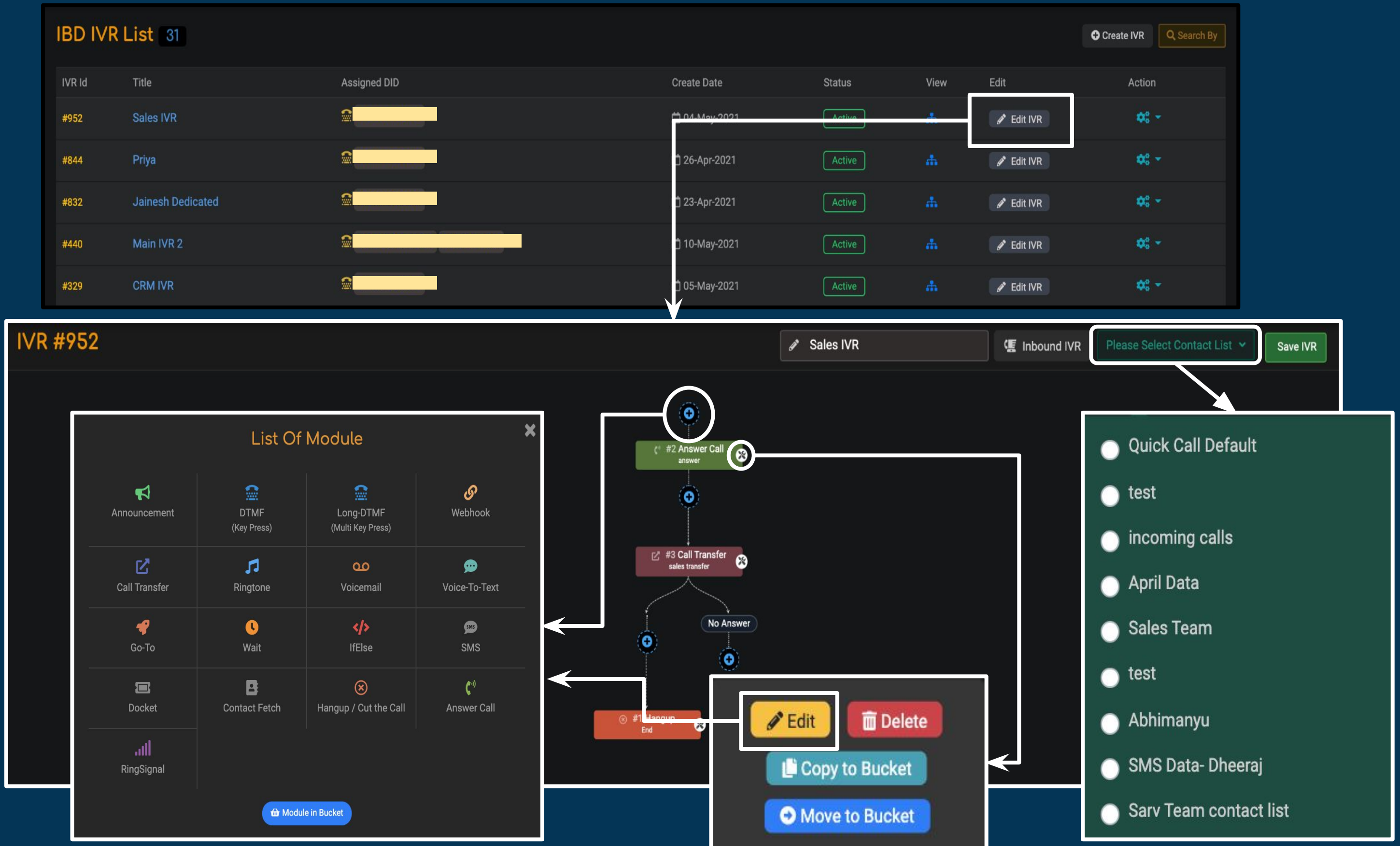


All the IVRs created in the user account are listed under this section.

The information included in this section-

- IVR ID & IVR Title
- IVR mapped to which DID (one or multiple)
- Create Date
- Status (Active/Inactive)
- View
    - The flow diagram will open which is linked & live with the DID.
- Action
    - Add CRM Info
    - Map IVR to DID

EDIT IVR

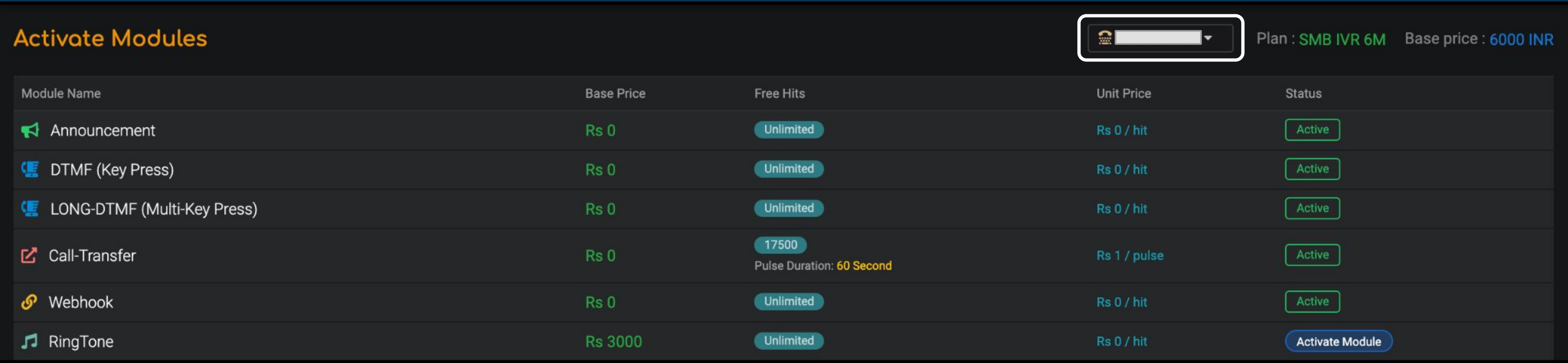

IBD IVR List 31
Create IVR
Search By
IVR Id
Title
Assigned DID
Create Date
Status
View
Edit
Action
#952
Sales IVR
04-May-2021
Active
Edit IVR
#844
Priya
26-Apr-2021
Active
Edit IVR
#832
Jainesh Dedicated
23-Apr-2021
Active
Edit IVR
#440
Main IVR 2
10-May-2021
Active
Edit IVR
#329
CRM IVR
05-May-2021
Active
Edit IVR
IVR #952
Sales IVR
Inbound IVR
Please Select Contact List
Save IVR
List Of Module
Announcement
DTMF (Key Press)
Long-DTMF (Multi Key Press)
Webhook
Call Transfer
Ringtone
Voicemail
Voice-To-Text
Go-To
Wait
IfElse
SMS
Docket
Contact Fetch
Hangup / Cut the Call
Answer Call
RingSignal
Module in Bucket
#2 Answer Call
answer
#3 Call Transfer
sales transfer
No Answer
End
Edit
Delete
Copy to Bucket
Move to Bucket
Quick Call Default
test
incoming calls
April Data
Sales Team
test
Abhimanyu
SMS Data- Dheeraj
Sarv Team contact list

Bucket: Copy any node or module of an IVR, if this is required to be used multiple times.

Copy: See it if you want to copy the flow to another place while keeping it at the original place as well. Just like *Copy and Paste.*

Move: Use it if you want to remove the flow from the original place and want to save it for future use. Just like *Cut and Paste.*

IBD - Activate Modules



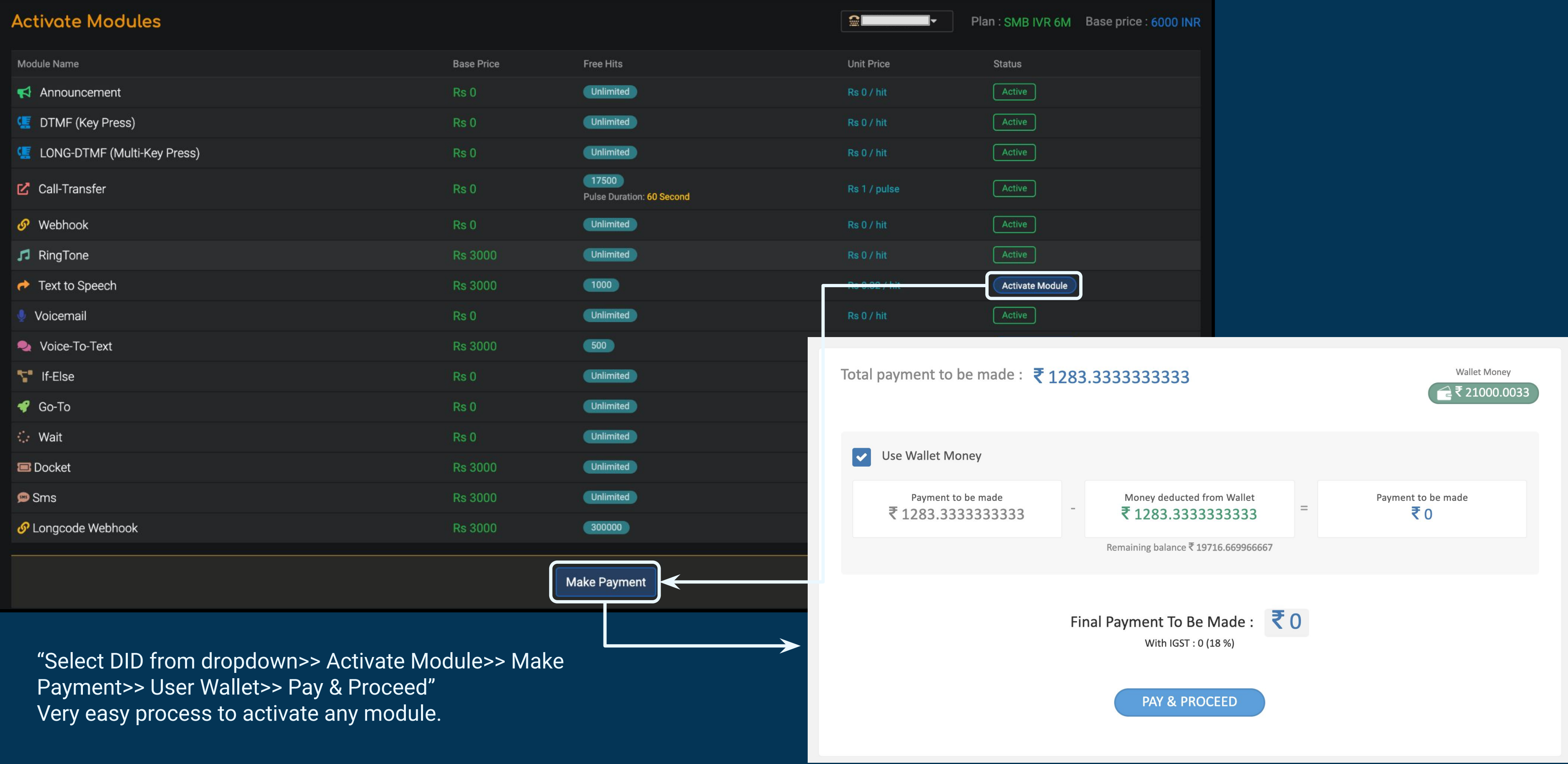
Activate Modules

Plan : SMB IVR 6M Base price : 6000 INR

Module Name	Base Price	Free Hits	Unit Price	Status
Announcement	Rs 0	Unlimited	Rs 0 / hit	Active
DTMF (Key Press)	Rs 0	Unlimited	Rs 0 / hit	Active
LONG-DTMF (Multi-Key Press)	Rs 0	Unlimited	Rs 0 / hit	Active
Call-Transfer	Rs 0	17500 Pulse Duration: 60 Second	Rs 1 / pulse	Active
Webhook	Rs 0	Unlimited	Rs 0 / hit	Active
RingTone	Rs 3000	Unlimited	Rs 0 / hit	Activate Module

All the modules are listed under this section. Users can choose a DID & review the module details with each DID individually. Click to buy any add-on & once purchased the status will be revised to Active.

- **MODULE NAME-** Name of each module.
- **BASE PRICE-** One-time cost of activation of the module. Few modules are priced and few are chargeable.
- **FREE HITS-** Based on the plan, there might be a few free hits under different modules.
- **UNIT PRICE-** Cost per hit after free hits are consumed.
- **STATUS-** Active refers to an active module, and Activate Module refers to an inactive module that the user can buy and use.



Module Name	Base Price	Free Hits	Unit Price	Status
Announcement	Rs 0	Unlimited	Rs 0 / hit	Active
DTMF (Key Press)	Rs 0	Unlimited	Rs 0 / hit	Active
LONG-DTMF (Multi-Key Press)	Rs 0	Unlimited	Rs 0 / hit	Active
Call-Transfer	Rs 0	17500 Pulse Duration: 60 Second	Rs 1 / pulse	Active
Webhook	Rs 0	Unlimited	Rs 0 / hit	Active
RingTone	Rs 3000	Unlimited	Rs 0 / hit	Active
Text to Speech	Rs 3000	1000	Rs 0.32 / hit	Activate Module
Voicemail	Rs 0	Unlimited	Rs 0 / hit	Active
Voice-To-Text	Rs 3000	500		
If-Else	Rs 0	Unlimited		
Go-To	Rs 0	Unlimited		
Wait	Rs 0	Unlimited		
Docket	Rs 3000	Unlimited		
Sms	Rs 3000	Unlimited		
Longcode Webhook	Rs 3000	300000		

"Select DID from dropdown>> Activate Module>> Make Payment>> User Wallet>> Pay & Proceed"
Very easy process to activate any module.

IBD - Billing

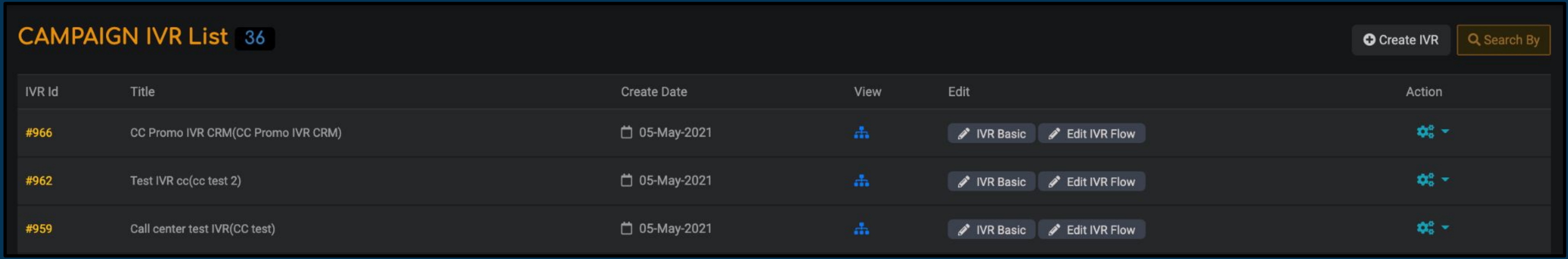
Billing Cycle Plan : SMB IVR 6M Base price : 6000 INR

Module Name	Spent Amount	Total Hits	Free Hits/Pulses	Free Hit/Pulse Consume
Announcement	Rs 0	0	Unlimited	0
DTMF (Key Press)	Rs 0	0	Unlimited	0
LONG-DTMF (Multy-Key Press)	Rs 0	0	Unlimited	0
Call-Transfer	Rs 0	296	17500 Pulse	422 Pulse
Webhook	Rs 0	39	Unlimited	0
Voicemail	Rs 0	0	Unlimited	0
Go-To	Rs 0	0	Unlimited	0
If-Else	Rs 0	0	Unlimited	0

The billing cycle will vary for each DID in the user account.

- **Spent Amount**
  - The amount is deducted as per total hits or pulse.
- **Total Hits**
  - How many times the module is accessed in a selected time interval?
- **Free Hits/Pulses**
  - Total free hits are included in the module package.
  - Pulse denotes to Call Transfer & Call Center module where 1 pulse is equivalent to 60 sec/1 Min.
- **Free Hit/Pulse Consume**
  - Out of free hits & pulse, this section shows how many have been consumed so far.

Campaign - IVR

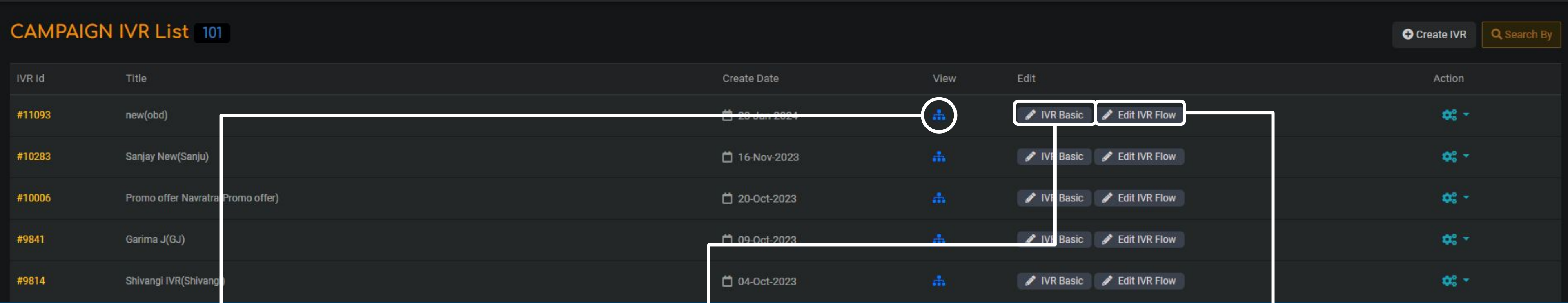


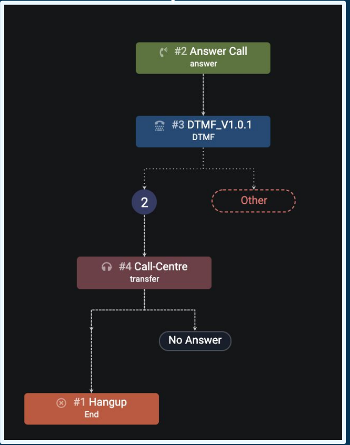
Campaign List IVR

All your IVRs will be listed under this section.

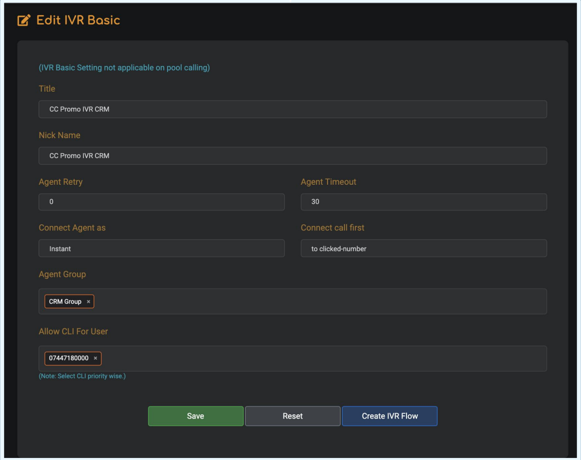
Here you can view and edit your IVR flow, and basic details using the steps shown in the next slide.

- Get the list of all the IVRs created in the user account.
- Unique IVR ID, IVR Title, and date of creation.
- View the flow with a single click on the same page.
- Edit the basic IVR details.
- Edit the IVR flow created.

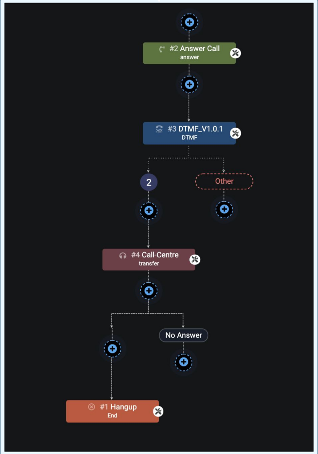




By clicking the "View" icon, the IVR flow icon will appear on the screen.



By clicking on "Edit IVR Basic", a dialog box will appear in which you can make changes to various fields.

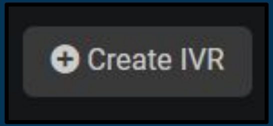


By clicking the "Edit IVR Flow", IVR flow will appear on the screen, you can edit it again as per your requirements.

Learn how to create an IVR flow for an outbound call.

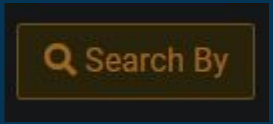
Create IVR

- Fill out a simple form with some basic required details.



Search By

- Search using IVR ID or Title or Date Range.



Campaign - Activate Modules

Activate Modules of Campaign Plan

Plan : SMB Outbound   Base price : 1200 INR

Module Name	Base Price	Free Hits	Unit Price	Status
Announcement	Rs 0	Unlimited	Rs 0/hit	Active
DTMF (Key Press)	Rs 0	Unlimited	Rs 0/hit	Active
LONG-DTMF (Multi-Key Press)	Rs 0	Unlimited	Rs 0/hit	Active
Call-Transfer	Rs 0	Hit : 15000 Pulse Duration : 60 Sec	Rs 0.5/pulse	Active
Call-Centre	Rs 0	Hit : 16200 Pulse Duration : 60 Sec	Rs 0.5/pulse	Active
Webhook	Rs 500	10000	Rs 0.02/hit	Active
Text to Speech	Rs 500	1000	Rs 0.32/hit	Active
Outbound	Rs 0	Hit : 16200 Pulse Duration : 60 Sec	Rs 0.5/hit	Active
Voicemail	Rs 0	Unlimited	Rs 0/hit	Active
Wait	Rs 0	Unlimited	Rs 0/hit	Active
If-Else	Rs 0	Unlimited	Rs 0/hit	Active
Go-To	Rs 0	Unlimited	Rs 0/hit	Active

List of all the active modules in the user account.

- **Base Price:** Price per module activation. This could be one-time or monthly.
- **Free Hits:** Total free hits offered with the module.
- **Unit Price:** Price per hit applicable to each consumed hit. In the case of free hits, the unit price applies once free hits are consumed.
- **Status:** Status of module- Active or Inactive (Activate Module).

Campaign - Plan Details

Plan Details are the plans that are purchased for the campaign by the organizations.

It has various modules in it, which organizations can purchase for their various campaigns as per the usage.

Plan Details have various details which are as follows:

- Plan Name
- Base Price
- Module Price
- Mobile Login Number

Campaign - Billing

Billing Cycle

Plan : RCOM Outbound-UL   Base price : 0 INR

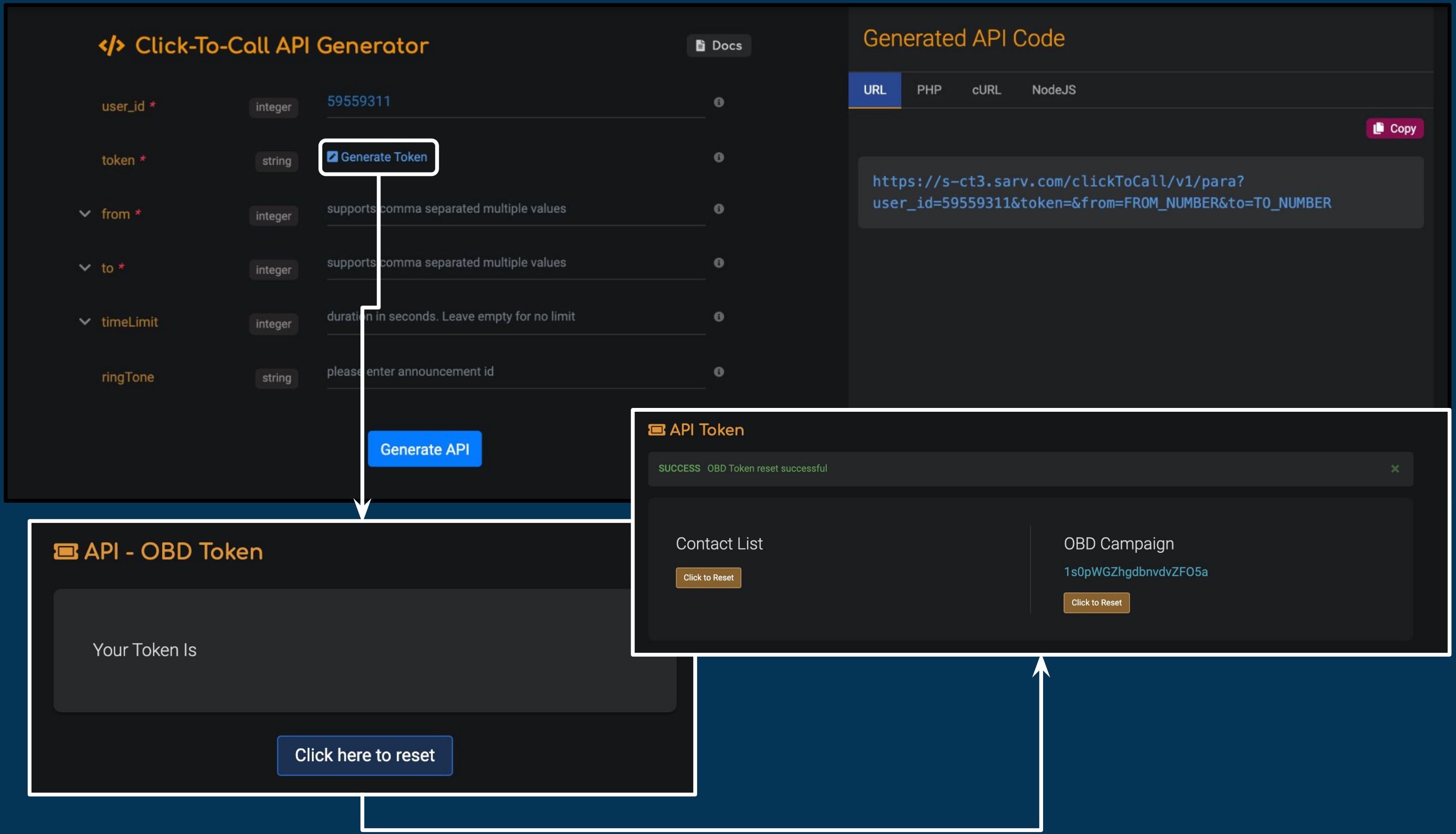
Module Name	Spent Amount	Total Access	Free	Free Consume
Announcement	Rs 0	196 Access	Unlimited Access	0 Access
DTMF (Key Press)	Rs 0	4 Access	Unlimited Access	0 Access
LONG-DTMF (Multy-Key Press)	Rs 0	0 Access	Unlimited Access	0 Access
Call-Transfer	Rs 0	71 Access	Unlimited Pulse	0 Pulse
Call-Centre	Rs 4.4	1428 Access	Unlimited Pulse	1369 Pulse
Webhook	Rs 0	0 Access	Unlimited Access	0 Access
RingTone	Rs 0	8 Access	Unlimited Access	0 Access
Text to Speech	Rs 0	183 Access	30000 Pulse	183 Pulse
Outbound	Rs 0	1050 Access	Unlimited Pulse	0 Pulse
mAuth	Rs 0	0	5000	0

The Billing Cycle is the cycle in which organizations can buy the various Modules for campaigning for a definite period.

Organizations can purchase any number of modules required to carry out their campaign activities as per their usage.

The amount charged for the specific module can vary for each organization according to their needs and the license required for the number of users who will be using the module to carry out the campaigns.

Campaign - Click-to-Call API



User ID

- A valid user id.

Token

- Generate a new one or use the existing token.
- Users can reset the token.

FROM

- Based on the value in from Type, it could be a valid phone number, or a valid agent id, or a valid group id.
- Users can also provide multiple comma values if FROM Type is Number or Agent.
- Users can pass up to 5 numbers.
- The number mentioned in “FROM” will be called first. Once answered, the system will call the number mentioned in ‘TO’.

TO

- In the “To” Type, it could be a valid phone number, or a valid agent id, or a valid group id.
- Users can also provide multiple comma values if the “TO” Type is Number or Agent.
- Users can pass up to 5 numbers. The Number mentioned in “TO” will be called once the “FROM” number is answered.

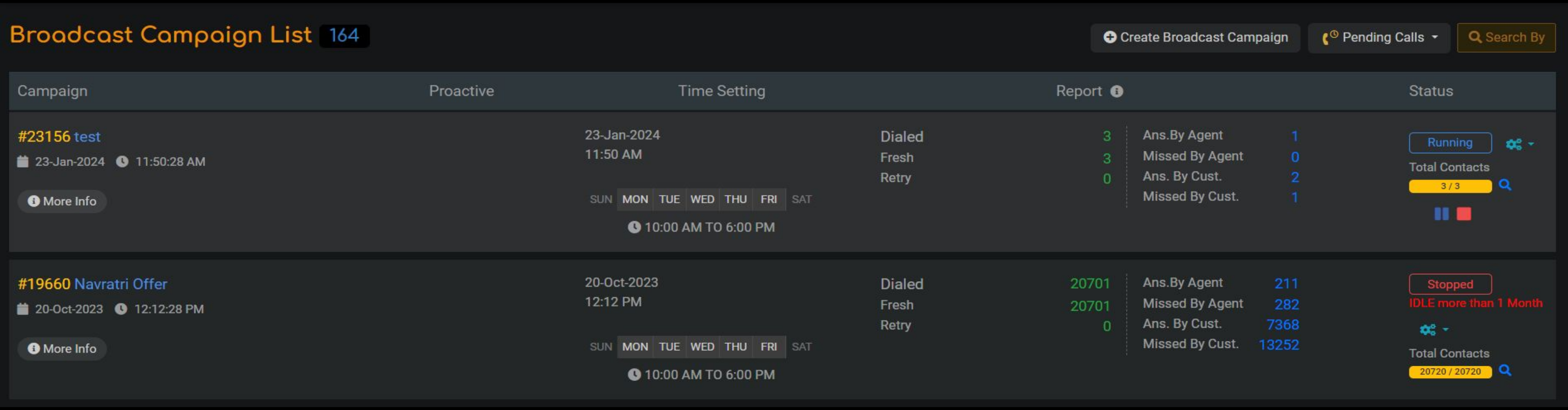
Time Limit

- It is duration in seconds to limit the talk time between FROM and TO.
- Ring durations of FROM and TO are not included in the Time Limit.
- The default Time Limit is Unlimited.

Ringtone

- This is a Valid ID of the announcement.
- If passed, an announcement will be heard by the FROM number in the loop while dialing the TO number.
- If not passed, the original announcement (played by the mobile operator) will be heard by the FROM number.

Broadcast Campaign List



Check your Broadcast Campaigns under this section. This section gives you a brief overview of all the campaigns. There are various segments for every campaign like **Campaign, Time Setting, Report, and Status.**

Each segment is explained one by one in the upcoming slides.

Broadcast Campaign - More Info

BROADCAST CAMPAIGN
Broadcast Campaign ID & Broadcast Campaign Name are used for easy search & specification of each campaign.

It shows the date and time of the campaign creation.

More Info-

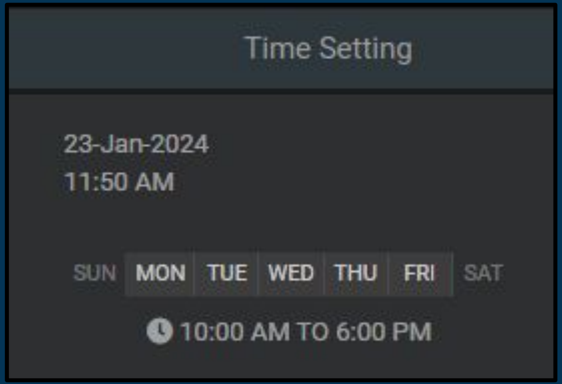
- When you click on the “More Info” button, pop-up flashes on the screen.
- You can click on IVR ID as it can be clickable to see the IVR flow.
- By clicking on Agent, you can view the contact list used & segmentation applied.
- The name of the Group or Agents who are assigned to the campaign can be viewed.
- Agent login settings are displayed for a quick brief on the same page.

Broadcast Campaign - Time Settings

Here campaign is active from Monday to Friday and shows inactive on Sunday and Saturday.

- Day names highlighted are Active.
- Day names not highlighted are Inactive.

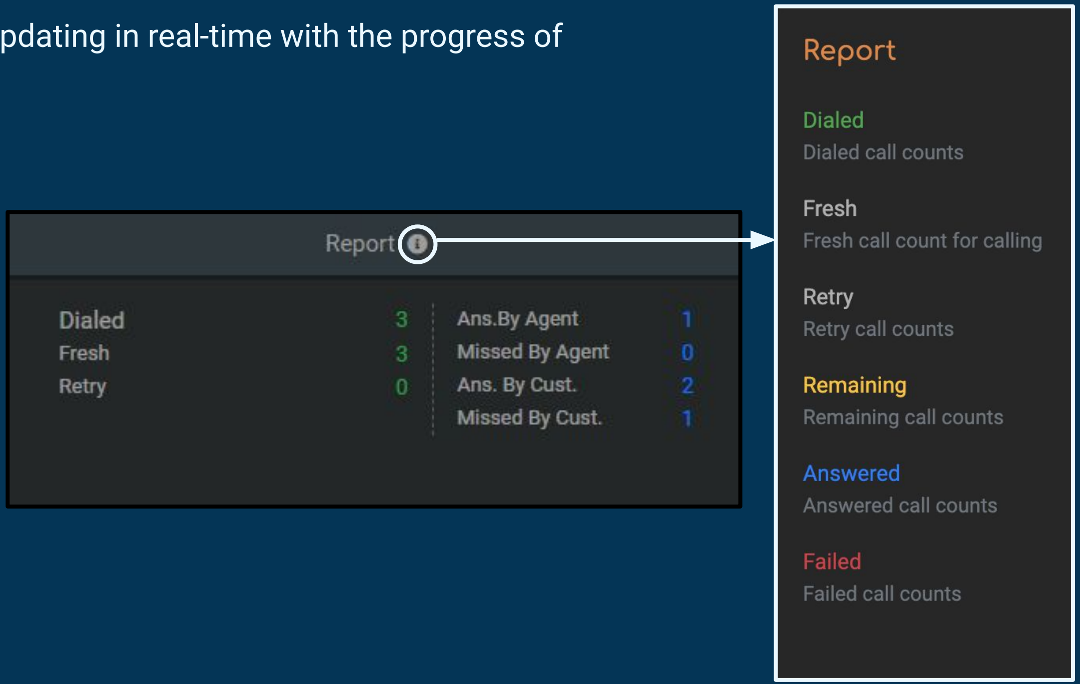
Set up time for campaigns when it's active. Like here 10 AM to 6 PM.



Broadcast Campaign - Report

REPORT

- Tooltip (i) added adjacent to report for quick brief of all status of calls.
- Counters for all the statuses keep updating in real-time with the progress of the campaign.



Broadcast Campaign - Status

Status of the Broadcast Campaign-

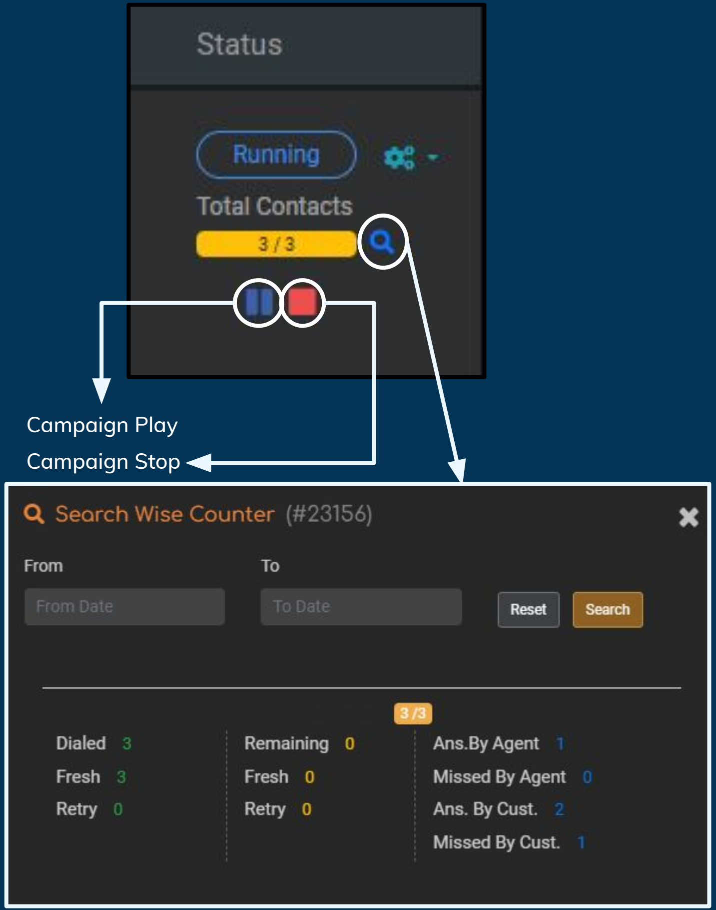
- **Running:** The campaign is active & running.
- **Paused:** The campaign is paused for a fixed time.
- **Completed:** The campaign is completed.
- **Stopped:** The campaign is stopped either forcefully by the user or completed as per campaign settings.
- **Done for the Day:** The campaign is paused for the day.

Campaign PLAY & Campaign STOP

- Useful to pause, play & stop the campaign.

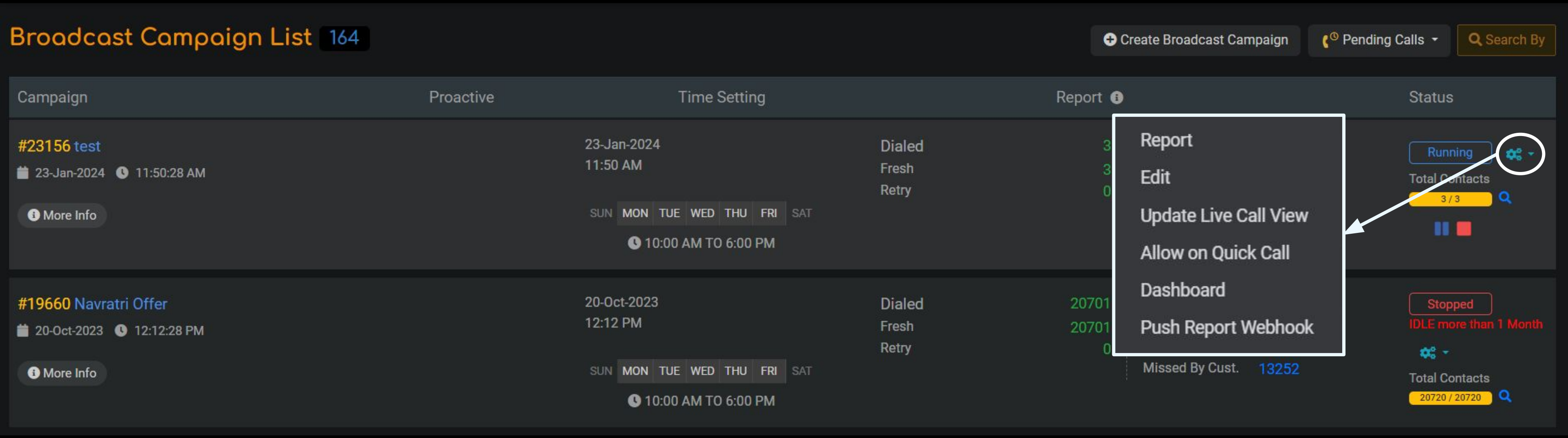
Search

- A Popup will help to search date-wise calling information.



DeepCall

Broadcast Campaign - Settings

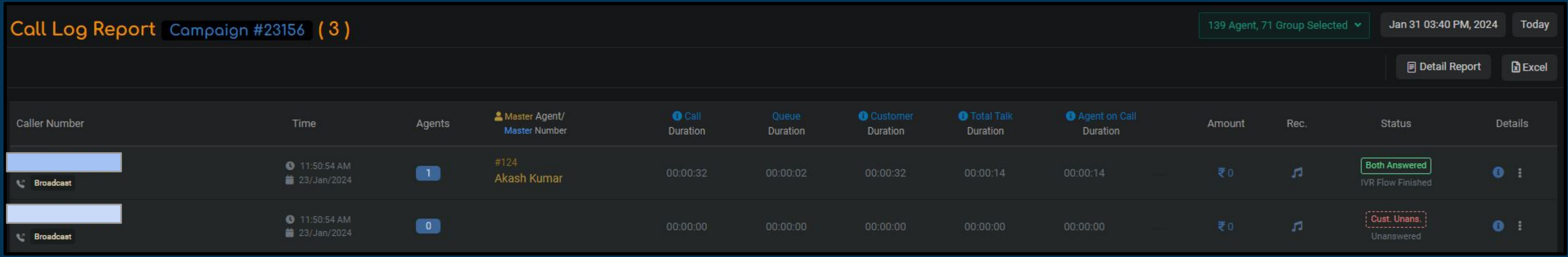


The action button under the Status tab allows you to take the following actions:

- Report
- Edit
- Update Live Call View
- Allow on Quick Call
- Dashboard
- Push Report Webhook

DeepCall

Settings - Report



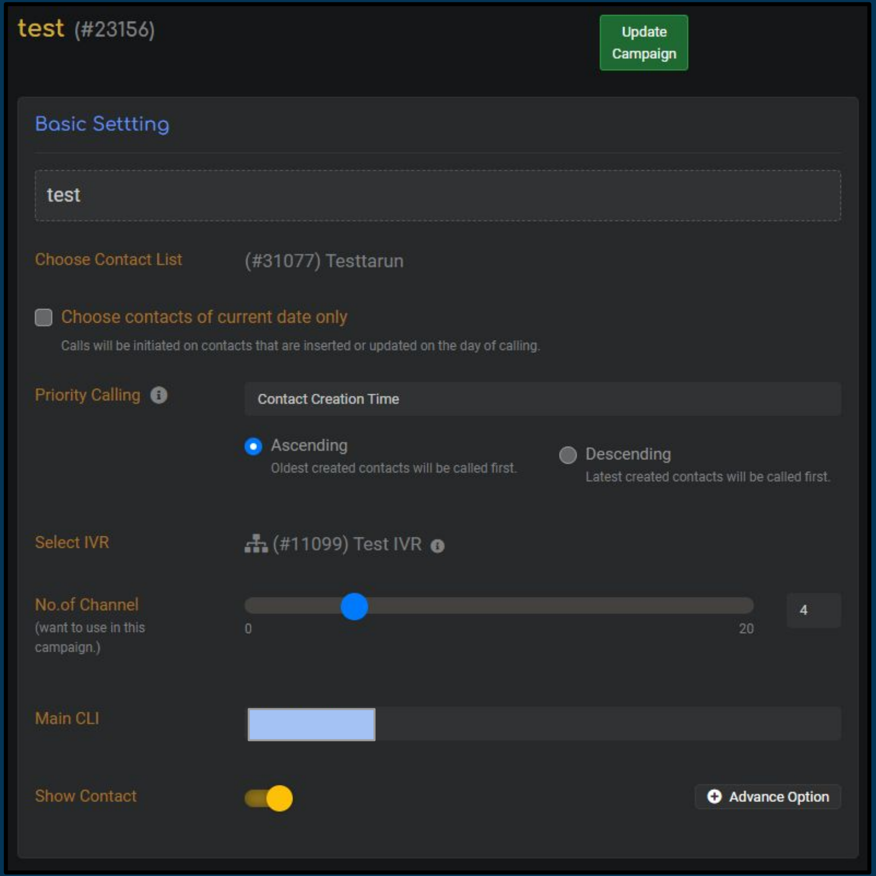
Through this, you will get a detailed Call Log Report consisting of the Caller Number, Date & Time of the Call, Clickable Agents Counter, Master Agent/Master Number, Call Duration, Queue Duration, Customer Duration, Total Talk Duration, Agent on Call Duration, Amount, Recording, Status and Details.

You can also download the report in Excel format.

Settings - Edit

The existing settings of the Broadcast are open here.

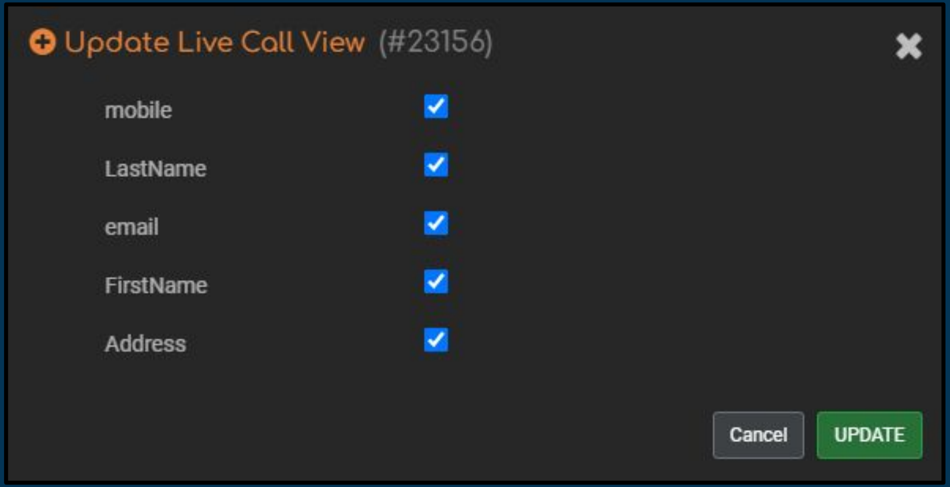
Edit the settings that are required and then save it to implement the changes.



Settings - Update Live Call View

This is another shortcut to edit this live call view.

Click on UPDATE to see the changes.



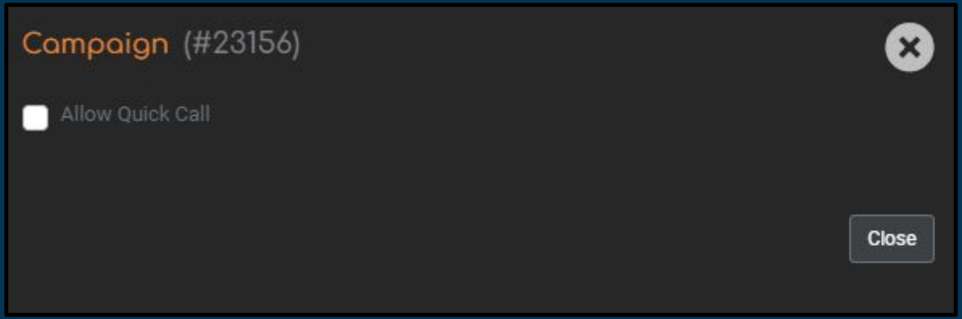
Settings - Allow Quick Call

When allowed, the call made via quick call can be inserted into the chosen campaign.

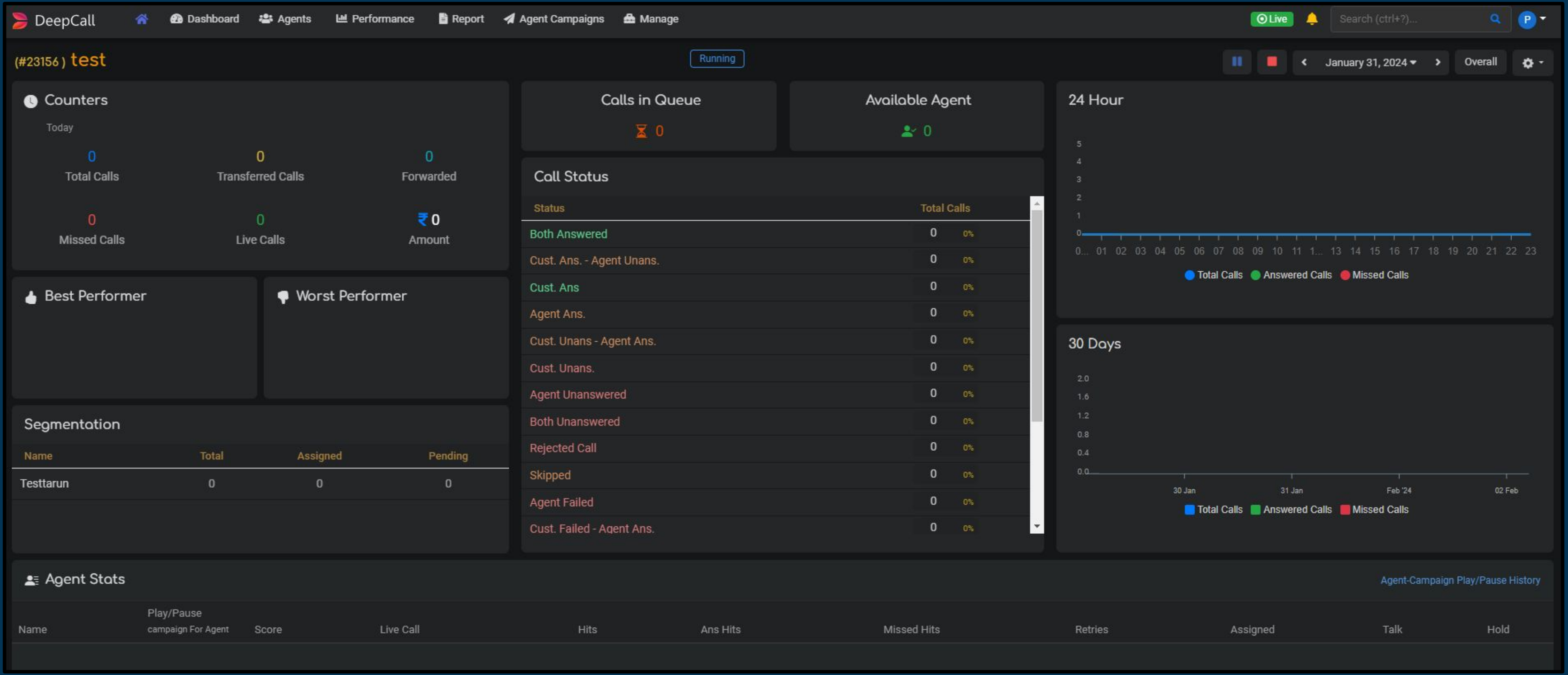
Otherwise, the quick call logs are stored separately.

Only campaigns that are allowed on Quick Call get this facility.

This way your quick call contact gets linked with the existing campaign & saved in it.



Settings - Dashboard



Settings - Dashboard Cont'd

In this, we can have the view of the complete information for any broadcast campaign at one place like-

Counter: It contains parameters like Total Calls, Transferred Calls, Forwarded, Missed Calls, Live Calls, and Amount.

Best Performer & Worst Performer: The user can check who is the best and worst performer in the entire campaign.

Segmentation: In this, the user can check the segment on the basis of fields declared at the time of contact creation.

Call Status: In this, the user can check the status of the call, like how it was responded to.

Day Wise: In this, total calls, answered calls, and missed calls are tracked as per the date range selected.

Agent Stats: There are various parameters to check the Agent activity during the date range selected.

Calls In Queue: In this, the user can view the current status of calls in the queue to get real-time data.

Available Agent: From here, the user can check the status of Agents who are available or not on the call at the moment.

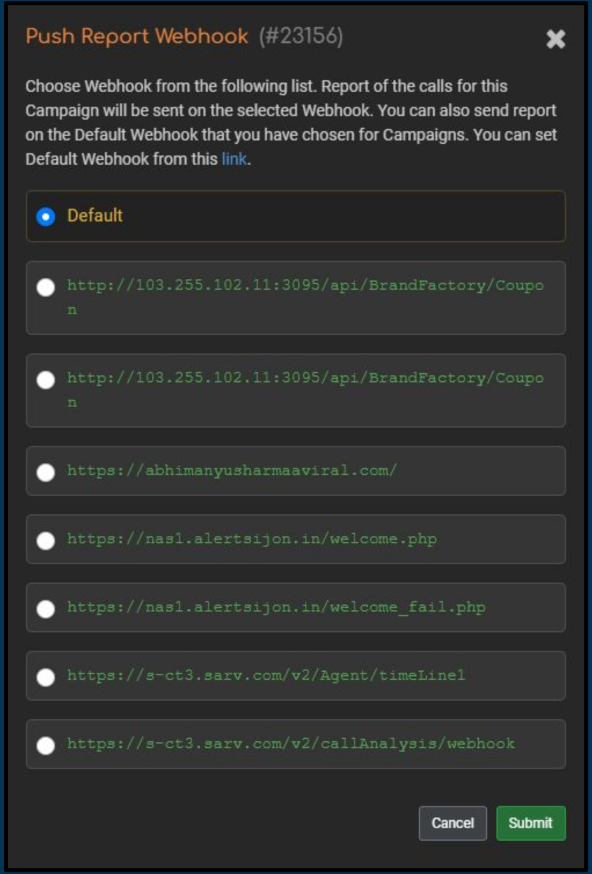
Settings - Push Report Webhook

Push report webhook helps users enable reports to be pushed to the user's platform.

Set Default Webhook by following the link.

Also, users can add more webhooks, and failed requests can be checked & added.

Search Filter to make the searching easy.



Create Broadcast Campaign

Campaign Title

Write your campaign's title here.

Choose Contact List

Select the contact list for your campaign.

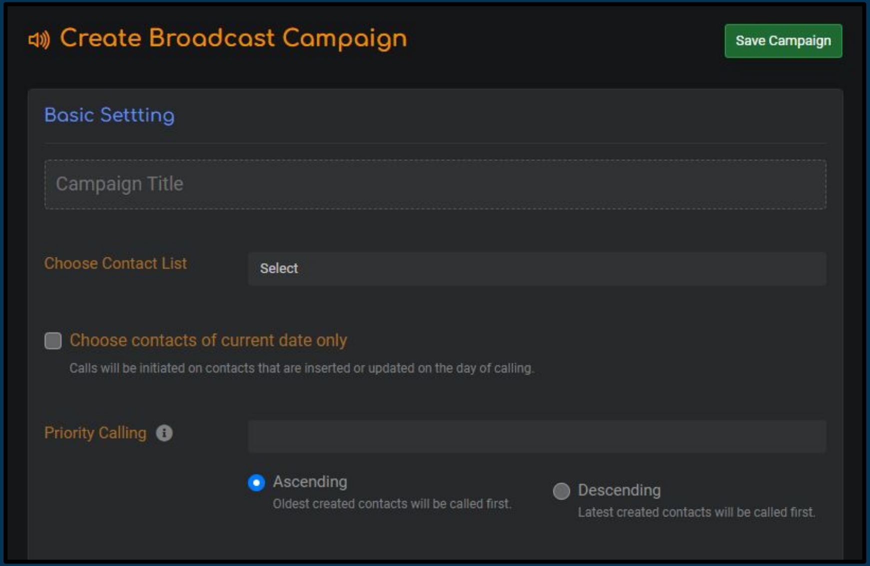
Choose contacts of current date only.

If this box is checked, calls will be initiated on Contacts that are inserted or updated on the day of calling.

Priority Calling

In this, the user is provided with the option to call in order of priority, here 1 is considered the highest priority, and 10 is considered the least priority.

- **Ascending:** In this, the priority will be given to the contacts in the order of 1 - 10, where 1 is a high priority and 10 is the least priority.
- **Descending:** In this, the priority will be given to the contacts in the order of 10 - 1, where 10 is the least priority and 1 is the high priority.



Create Broadcast Campaign - cont'd

Select IVR

Select the IVR flow that is saved in your account.

Create IVR

Click on this if you want to create a new IVR flow.

No. of Channel

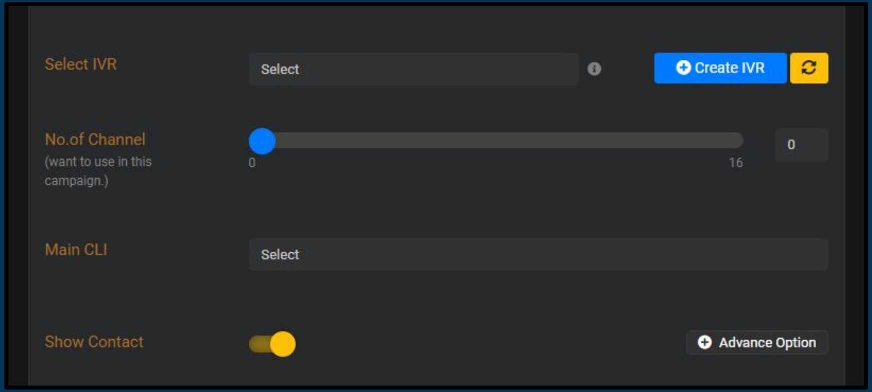
You can slide the toggle bar to the right to select the no. of channels in the campaign.

Main CLI

Choose the Main CLI from the drop-down menu from which the call will be made to the contact

Show Contact

You can decide whether to show the contact or hide it for privacy.



Create Broadcast Campaign - cont'd

Advance Option

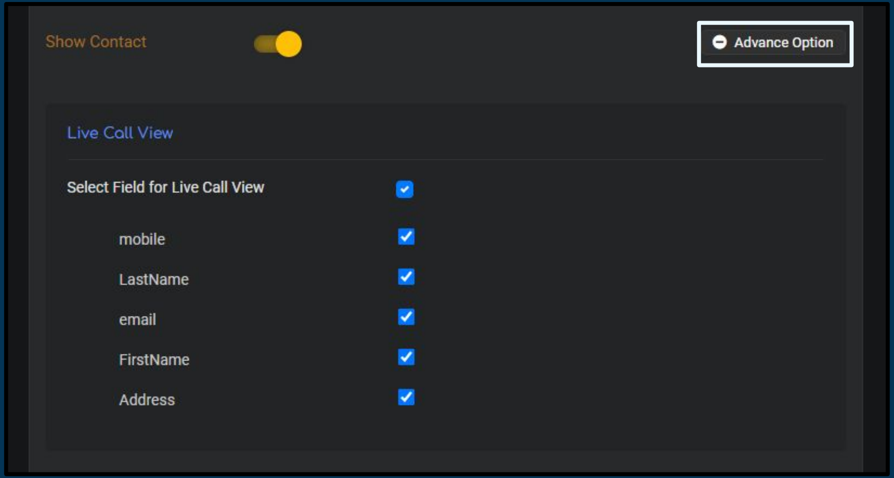
You can select the “Advance Option” tab to add more features in creating the Broadcast Campaign.

Live Call View

The contact list linked with the campaign carries multiple columns/custom fields.

All those fields will appear, choose from the list.

Chosen fields will be visible to an agent in the Contact form & the rest will remain hidden.



Create Broadcast Campaign - cont'd

Agent Setting

Group
Groups will be displayed in a dropdown to choose from the list.

Initiate calls per available agent
You can select the number of calls to be initiated per available agent.

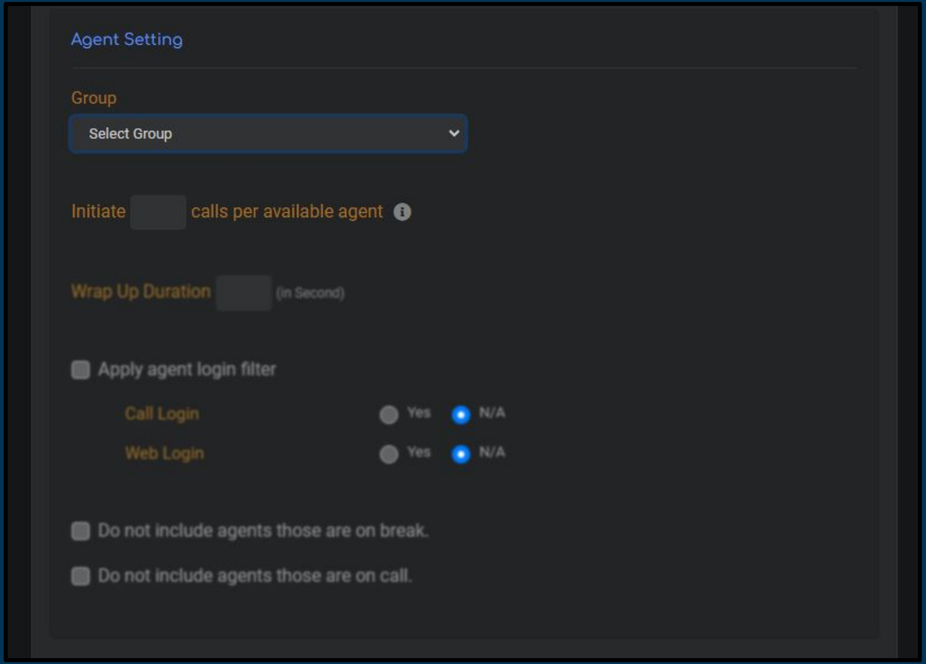
Wrap Up Duration
This is the interval between the two calls.

Apply Agent Login Filter

- **Call Login:** For calls to connect to the agent set whether call login is required or not.
- **Web Login:** For calls to connect to agent set whether web login is required or not.

Do not include agents those are on break
You can select to consider the Agents those are on break.

Do not include agents those are on call
You can select to consider the Agents those are on call.

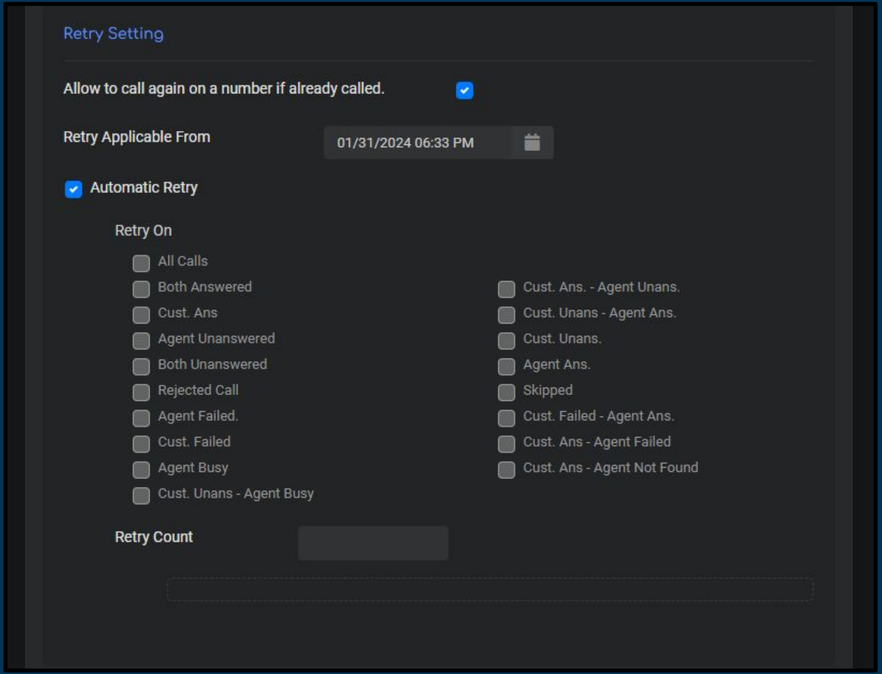


Create Broadcast Campaign - cont'd

Retry Setting

Allow to Call again on a number if already called

- Retry Applicable From
  - Choose to set up the retry from the date you wish to do so.
- Automatic Retry
  - Enable automatic retry, you can select from multiple categories.
  - Set retry count



Create Broadcast Campaign - cont'd

Timing

Week Days

- Choose weekdays for which the campaign will remain active.

Working Hours

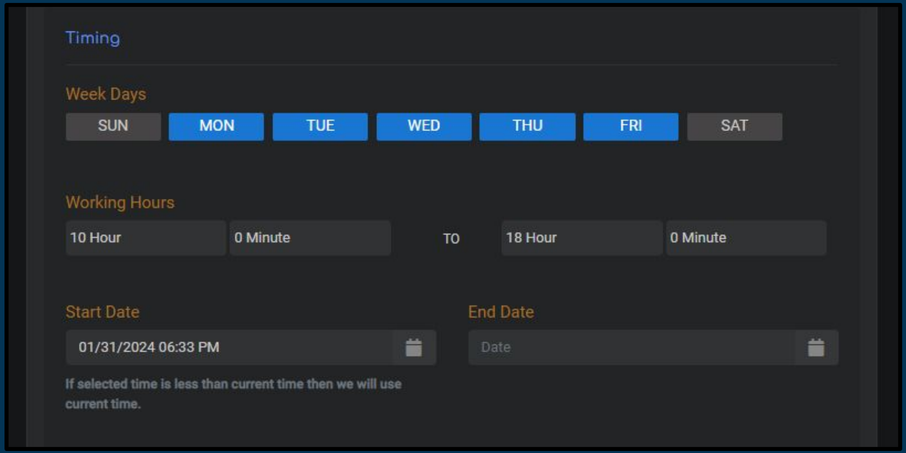
- Time duration on chosen weekdays when the campaign is active.

Start Date

- The Calendar appears to choose the start date and time.

End Date

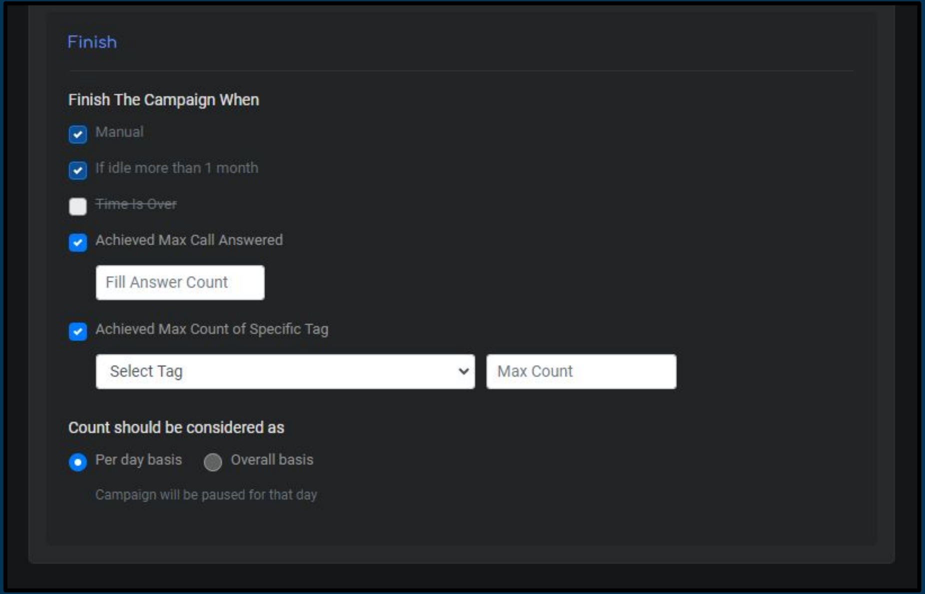
- The Calendar appears to choose the end date and time.



Create Broadcast Campaign - cont’d

Confirm the Finish Settings of the campaign-

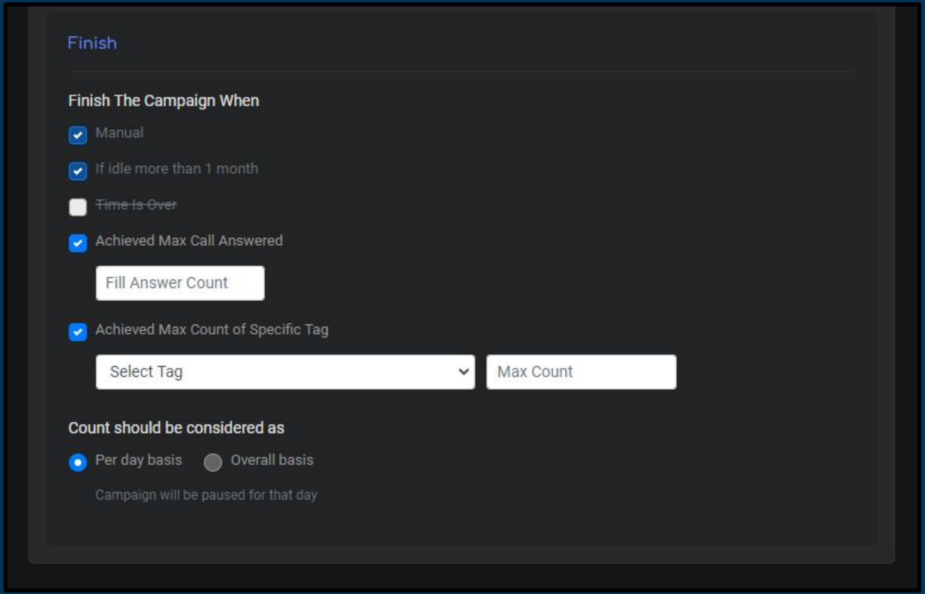
- **Manual:** The Campaign needs to be paused/stopped manually.
- **If Idle for more than 1 Month:** In this case, after 1 month, the campaign will be stopped automatically.
- **Time is Over:** If the end time is set then the campaign will be finished on the decided date & time.
- **Achieved Max Call Answered:** Fill in the counter of calls, the user wants to set for agents. Once this is achieved the campaign will be marked Finished.
- **Achieved Max Count of Specific Tag:** Set up the counter of any tag. Agents mark the call records with the tag & once the counter is reached, the campaign will be stopped by the system automatically.



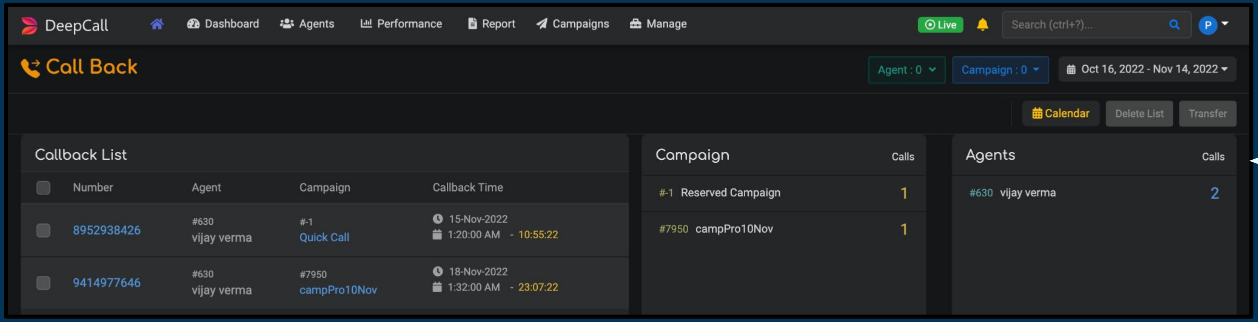
Create Broadcast Campaign - cont'd

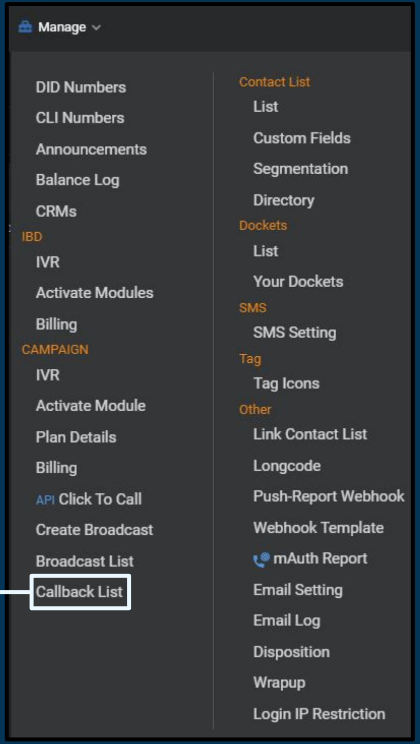
The count should be considered as

- **Per Day Basis:** Max call counter to be considered on a day basis.
- **Overall Basis:** When the added count of calls is achieved, the campaign will be stopped.



Campaign - Callback Transfer



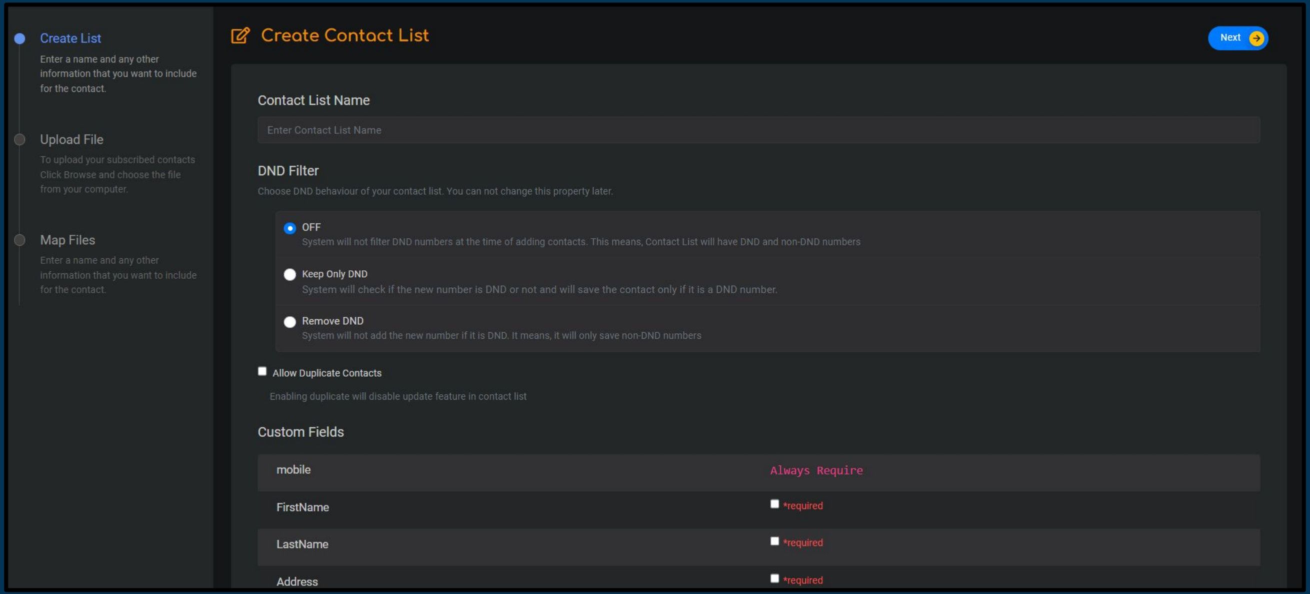


If there is any callback scheduled, it will show in this section.

You can filter the list based on the date range.

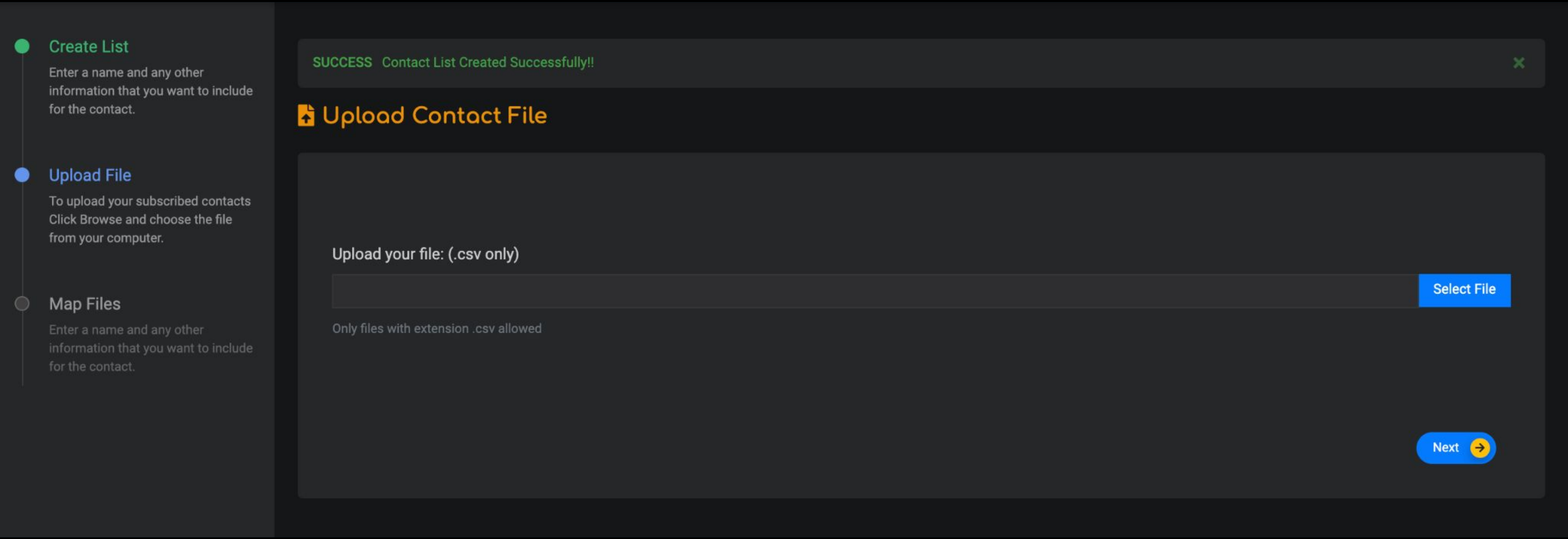
Here you can delete the callback request or transfer it to another agent too.

Contact List - Create List



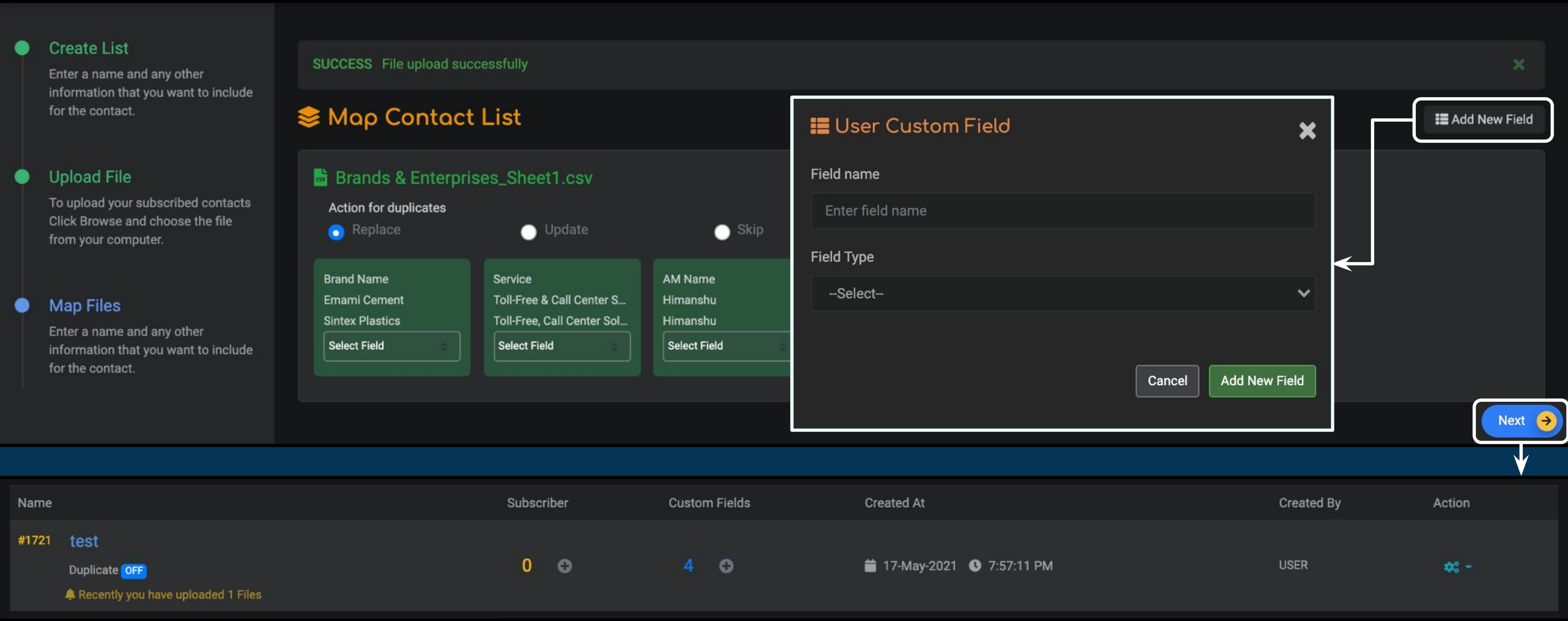
When you click on the “Create List” button under the contact list, this screen will appear. You have to enter the Contact List Name, select the DND Filter, and select the various custom fields by clicking on the checkbox that is required.

Contact List - Upload Files

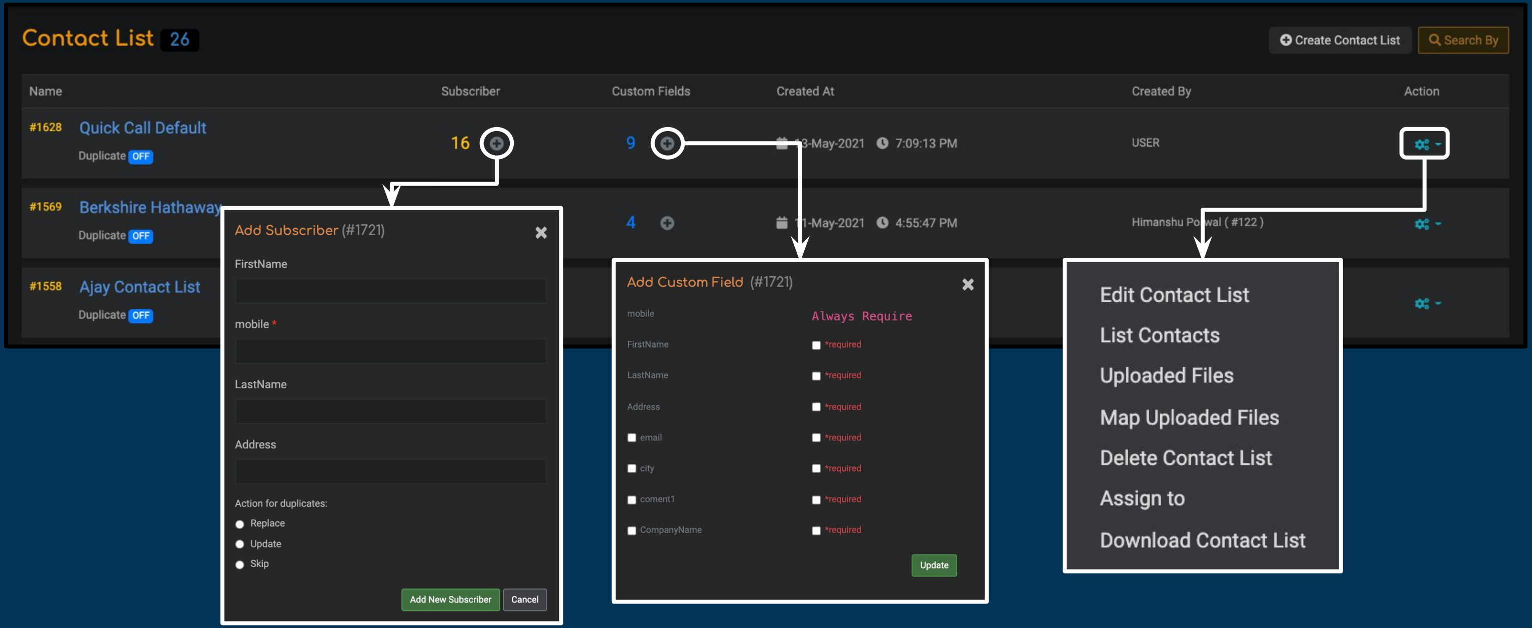


- Uploaded file must be in .CSV format
- Upload and move to the NEXT step.

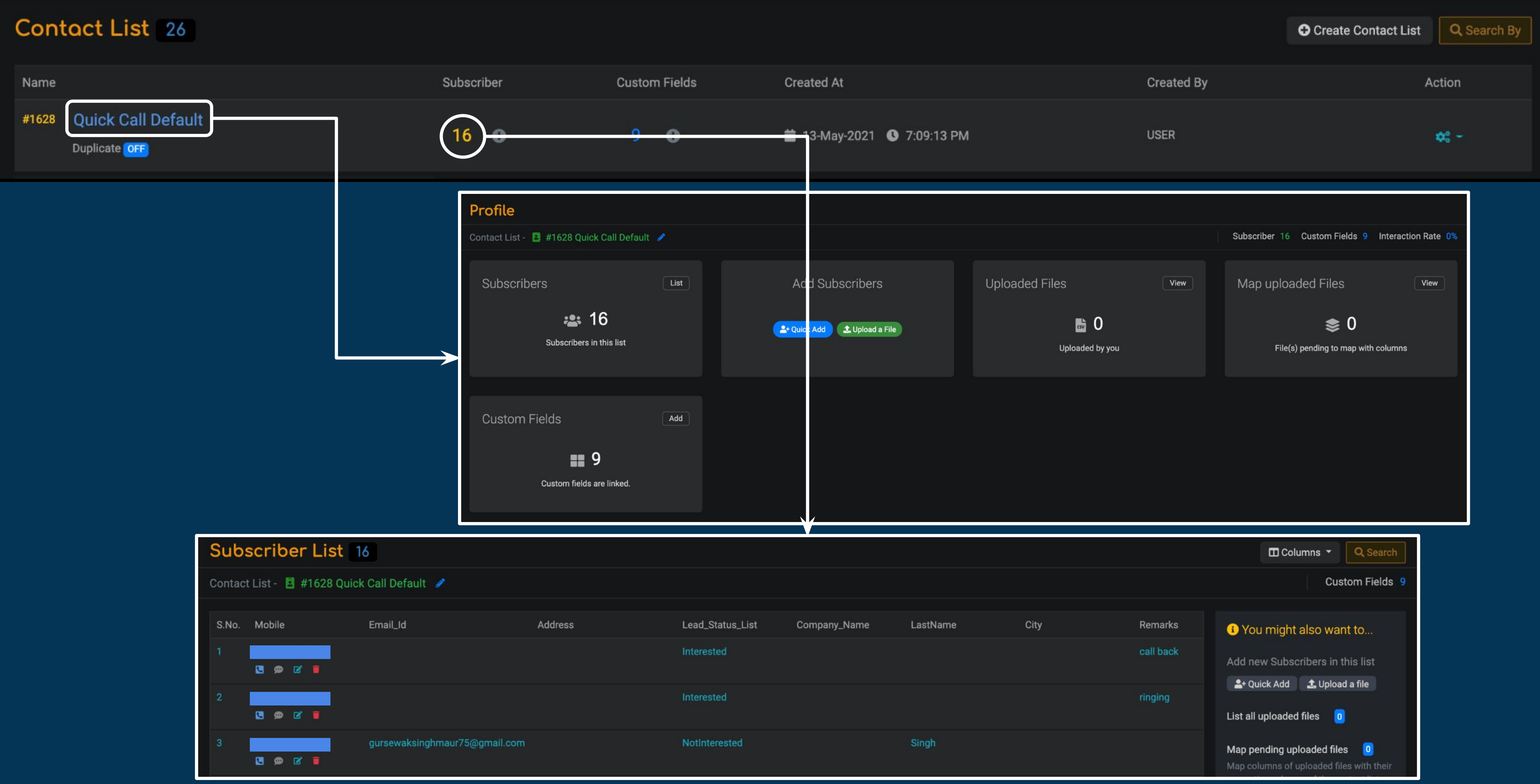
Contact List - Map List



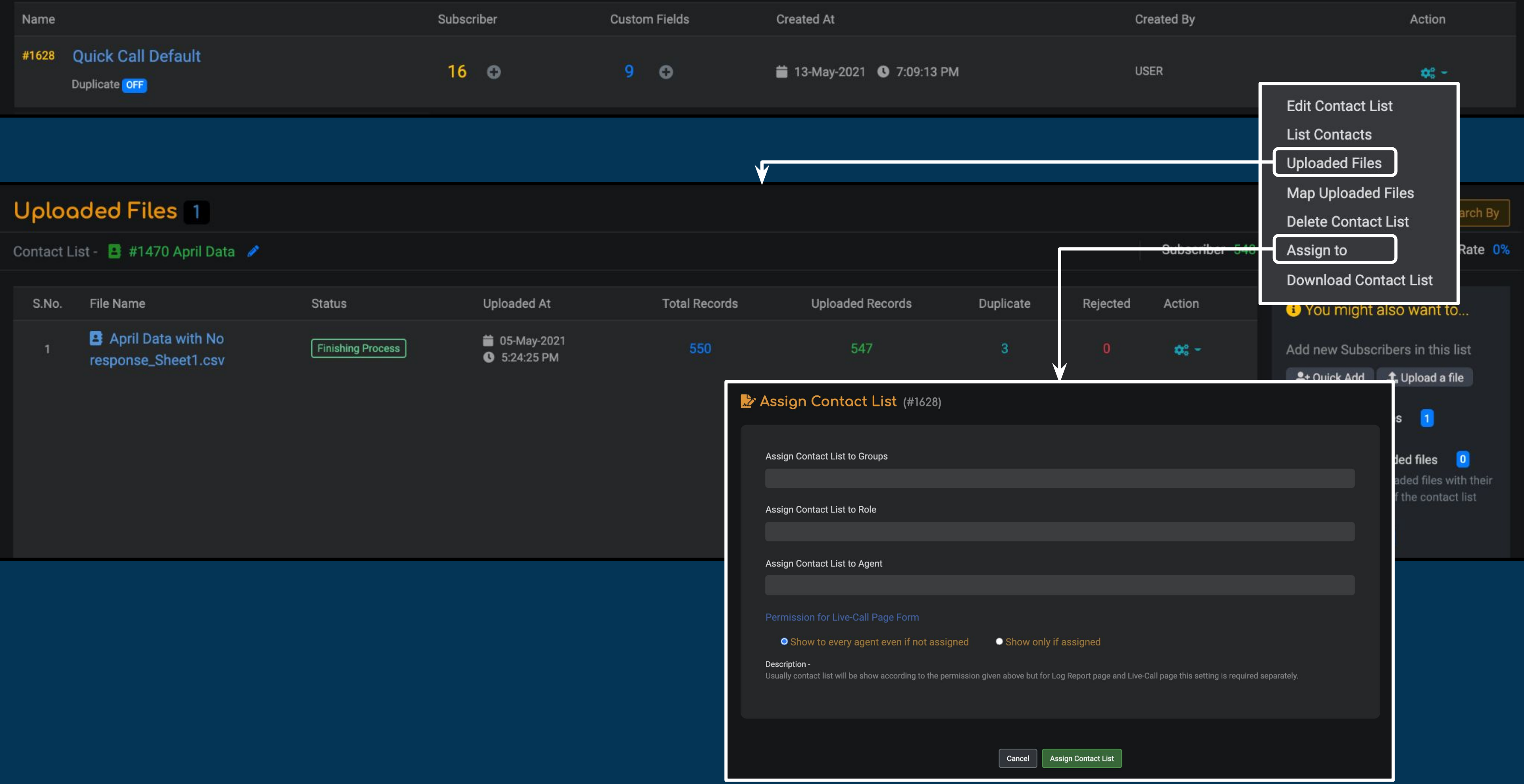
List



- All the contact lists added to the account will be listed on this page.
- **Contact List Name**
  - Name of all the list added in the user account.
  - Check the Duplicate status- ON or OFF.


Contact List 26
Create Contact List
Search By
Name
Subscriber
Custom Fields
Created At
Created By
Action
#1628
Quick Call Default
Duplicate OFF
16
9
13-May-2021
7:09:13 PM
USER
Profile
Contact List - #1628 Quick Call Default
Subscriber 16
Custom Fields 9
Interaction Rate 0%
Subscribers
List
16
Subscribers in this list
Add Subscribers
Quick Add
Upload a File
Uploaded Files
View
0
Uploaded by you
Map uploaded Files
View
0
File(s) pending to map with columns
Custom Fields
Add
9
Custom fields are linked.
Subscriber List 16
Columns
Search
Contact List - #1628 Quick Call Default
Custom Fields 9
S.No.
Mobile
Email_Id
Address
Lead_Status_List
Company_Name
LastName
City
Remarks
1
Interested
call back
2
Interested
ringing
3
gursewaksinghmaur75@gmail.com
NotInterested
Singh
You might also want to...
Add new Subscribers in this list
Quick Add
Upload a file
List all uploaded files
0
Map pending uploaded files
0
Map columns of uploaded files with their

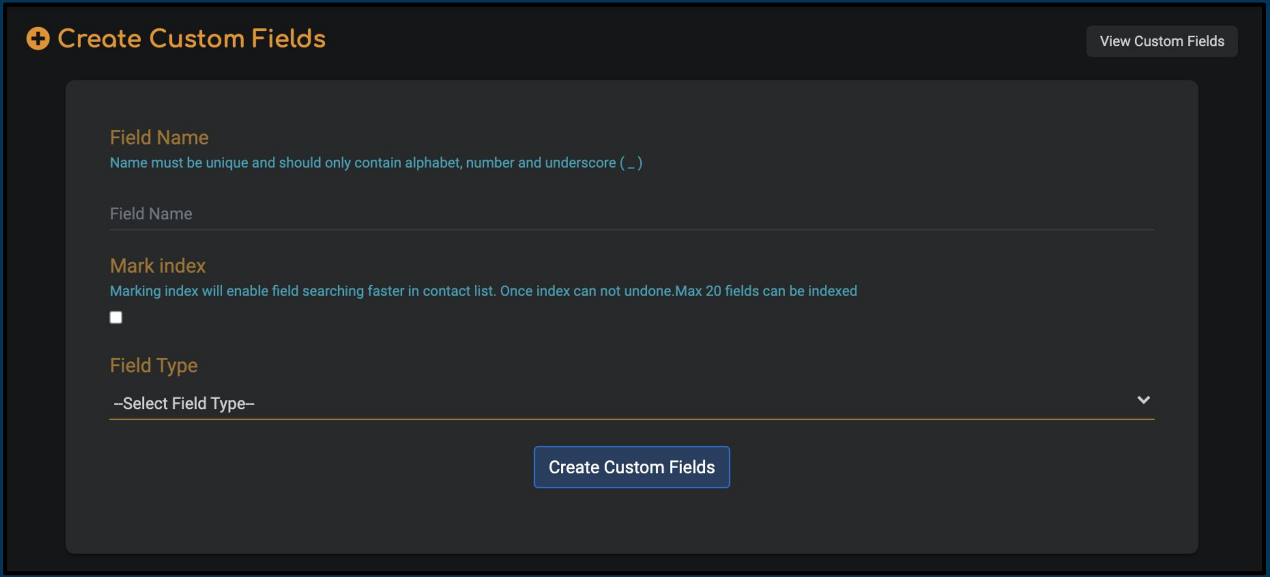
- **Subscriber**
    - Subscribers refer to the contact numbers uploaded in the contact list.
    - The counter is clickable. When clicked new page opens showing details of the contacts.
    - Details include the other information in association with the respective contact number.
    - Direct option to add a new contact number or upload a new data file.
    - Every contact has individual operations to make QUICK CALL, SEND MESSAGE, EDIT & DELETE.
- **Custom Fields**
    - Several custom fields linked with the contact list are displayed.
    - Click on the '+' icon to link more custom fields to the contact list.
- **Created By**
    - Create Date & Time.
    - Who created the contact list- User, Agent (Agent name and ID will be displayed for quick information).


Name
Subscriber
Custom Fields
Created At
Created By
Action
#1628
Quick Call Default
Duplicate OFF
16
9
13-May-2021 7:09:13 PM
USER
Edit Contact List
List Contacts
Uploaded Files
Map Uploaded Files
Delete Contact List
Assign to
Download Contact List
Uploaded Files 1
Contact List - #1470 April Data
S.No.
File Name
Status
Uploaded At
Total Records
Uploaded Records
Duplicate
Rejected
Action
1
April Data with No response_Sheet1.csv
Finishing Process
05-May-2021 5:24:25 PM
550
547
3
0
You might also want to...
Add new Subscribers in this list
Quick Add
Upload a file
Assign Contact List (#1628)
Assign Contact List to Groups
Assign Contact List to Role
Assign Contact List to Agent
Permission for Live-Call Page Form
Show to every agent even if not assigned
Show only if assigned
Description -
Usually contact list will be show according to the permission given above but for Log Report page and Live-Call page this setting is required separately.
Cancel
Assign Contact List

Actions

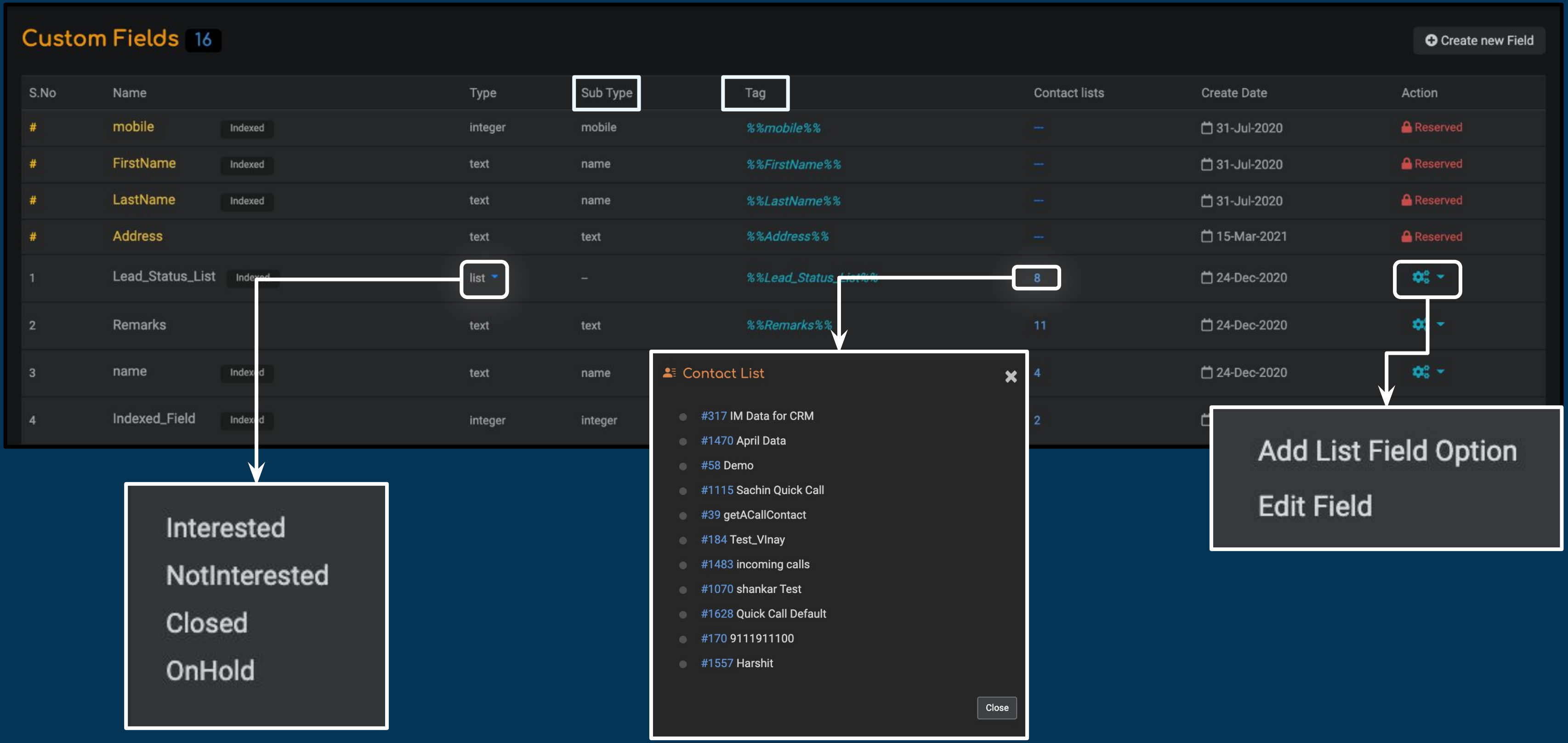
- **Edit Contact List**
  - Click to open a popup and revise the name of your contact list.
- **List Contacts**
  - It will open a detailed view of the contact added to the contact list.
  - Users can make all necessary amendments to the data.
- **Uploaded Files**
  - List of all the CSV files uploaded in the contact list to add data.
- **Map Uploaded Files**
  - If mapping is left incomplete, the user can access this and complete the mapping.
- **Delete Contact List**
  - A confirmation popup will open to get the second consent and as per the response will proceed to take necessary action.
- **Assign To**
  - Choose to assign the contact list to any GROUP, ROLE, or AGENT.
- **Download Contact List**
  - Single click download.
  - CSV file will be downloaded.

Custom Fields - Create New Field

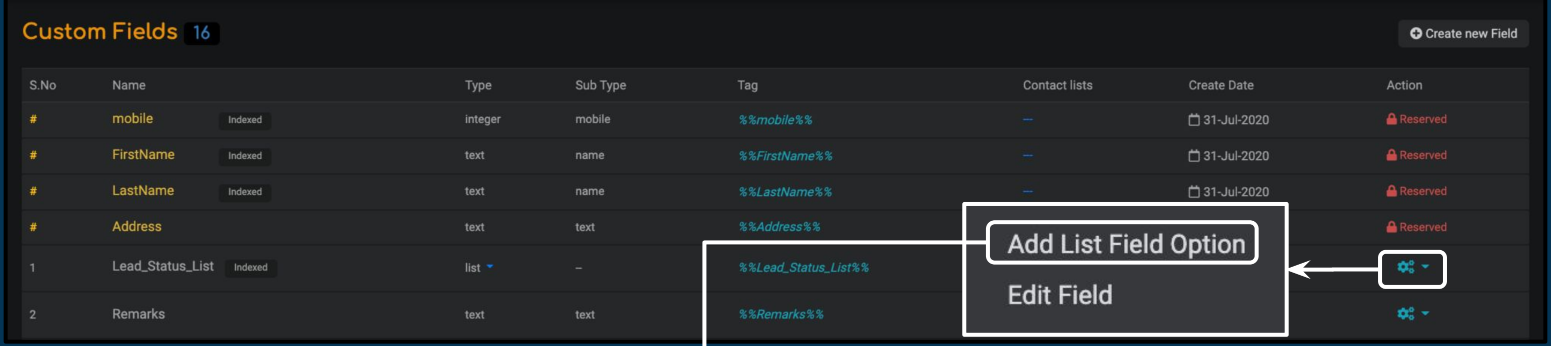


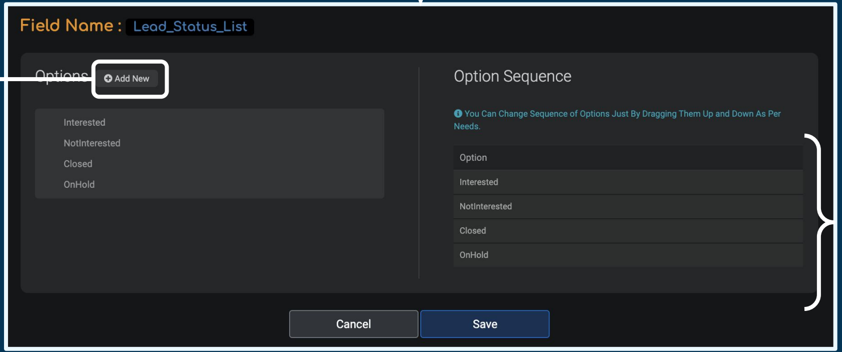
- **Custom Field Category**
  - **Reserved:** Default uneditable custom fields & cannot be deleted.
  - **Other:** Added by the user. Can be edited/deleted if not linked with the contact list. Once linked the custom field cannot be deleted until the contact list is deleted first.
- **Name**
  - Name of the custom field. The naming pattern is fixed as discussed in an earlier section.

Custom Fields - List



- **Type**
  - As decided while creating the custom field the type will be displayed.
- **Sub Type**
  - As decided while creating the custom field.
- **Tag**
  - Every custom field is assigned a default tag by the system.
  - These tags are used for mapping or fetching value.
- **Contact Lists**
  - Contact lists in which the custom field is linked.
  - The counter is clickable to open a popup to view the names of linked contact lists.
- Create the Date of the custom field.



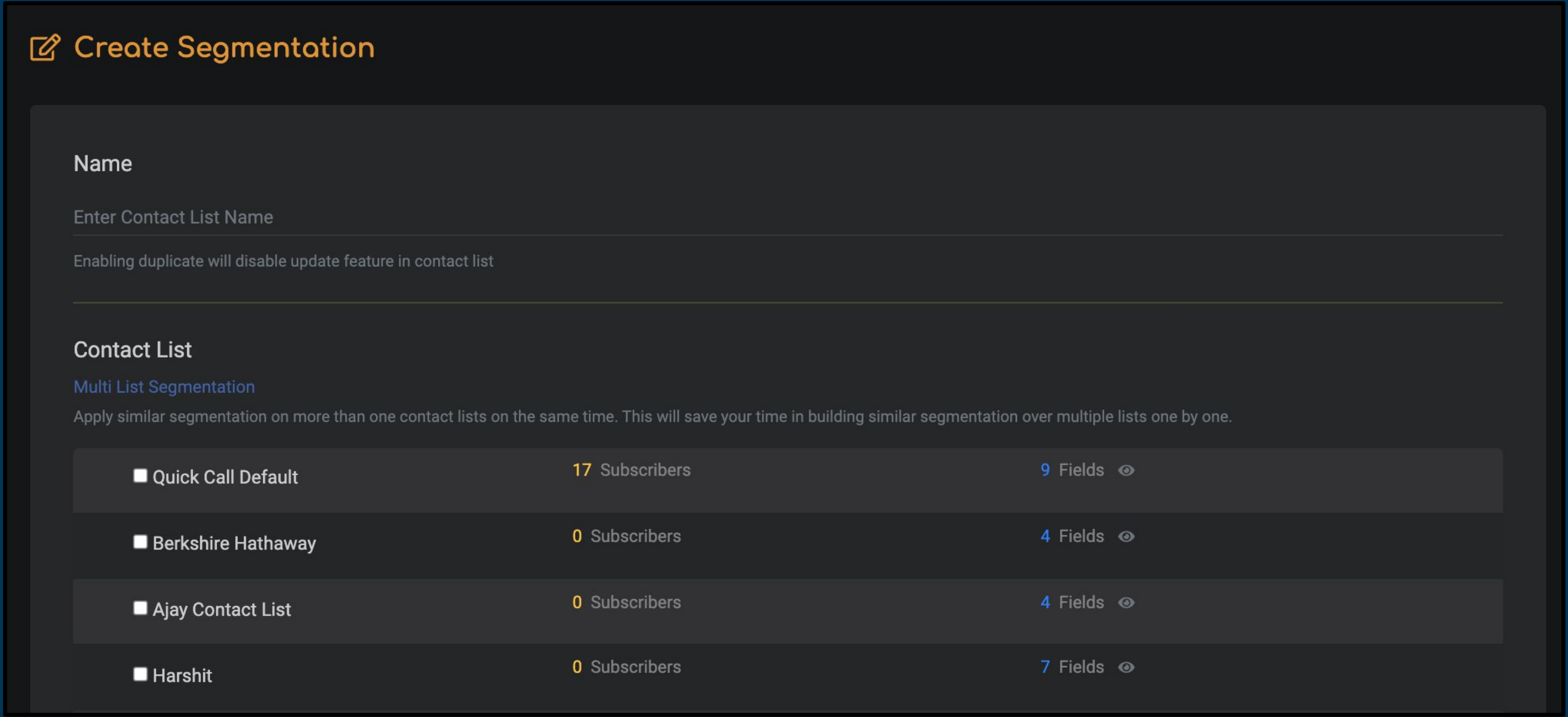


Click to add a new list variable to an existing list.

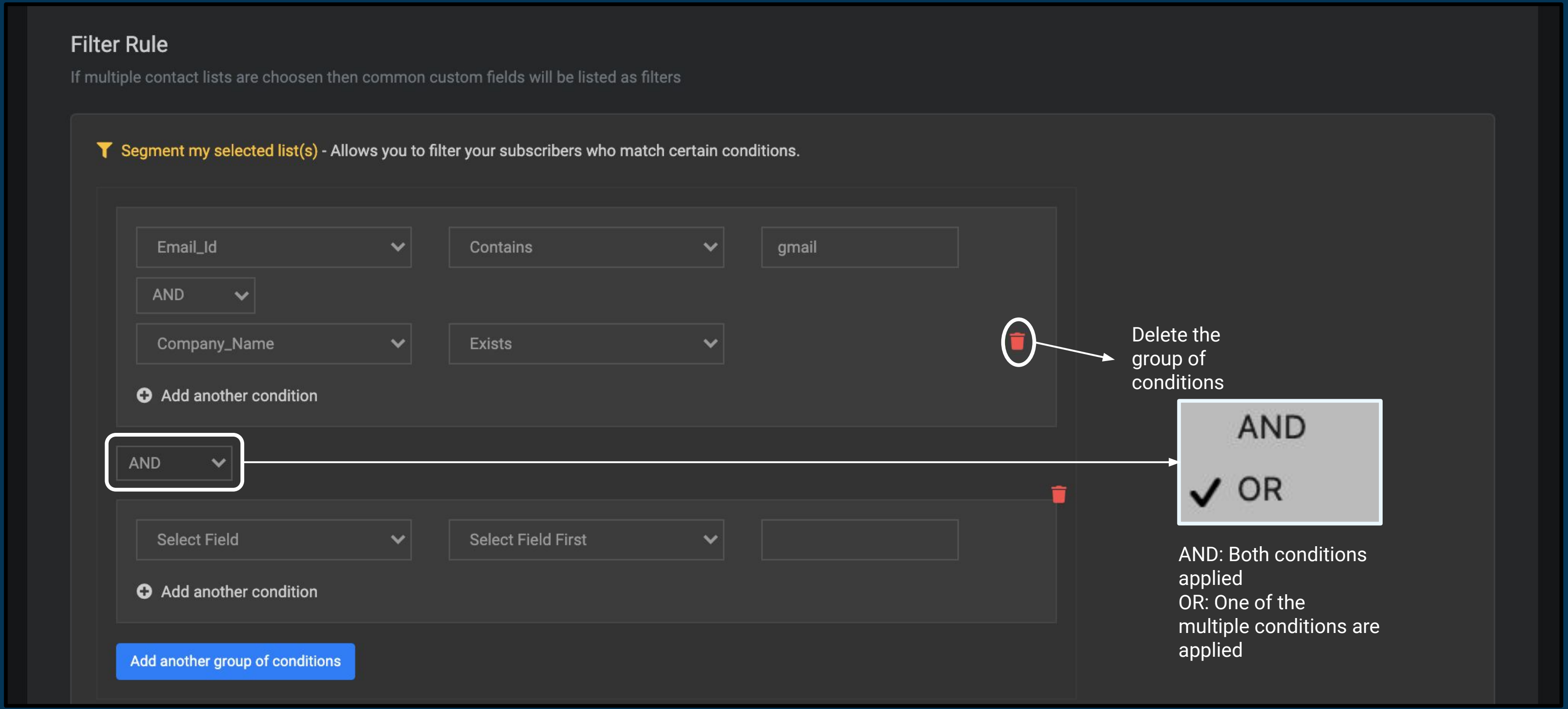
Drag & replace the field variables & decide the sequence of all the variables.

- **Action**
  - **Add List Field Option**
    - Add more options to the existing list.
    - Decide the sequence of the list variable.
  - **Edit Field**
    - Edit the variables of the custom field.

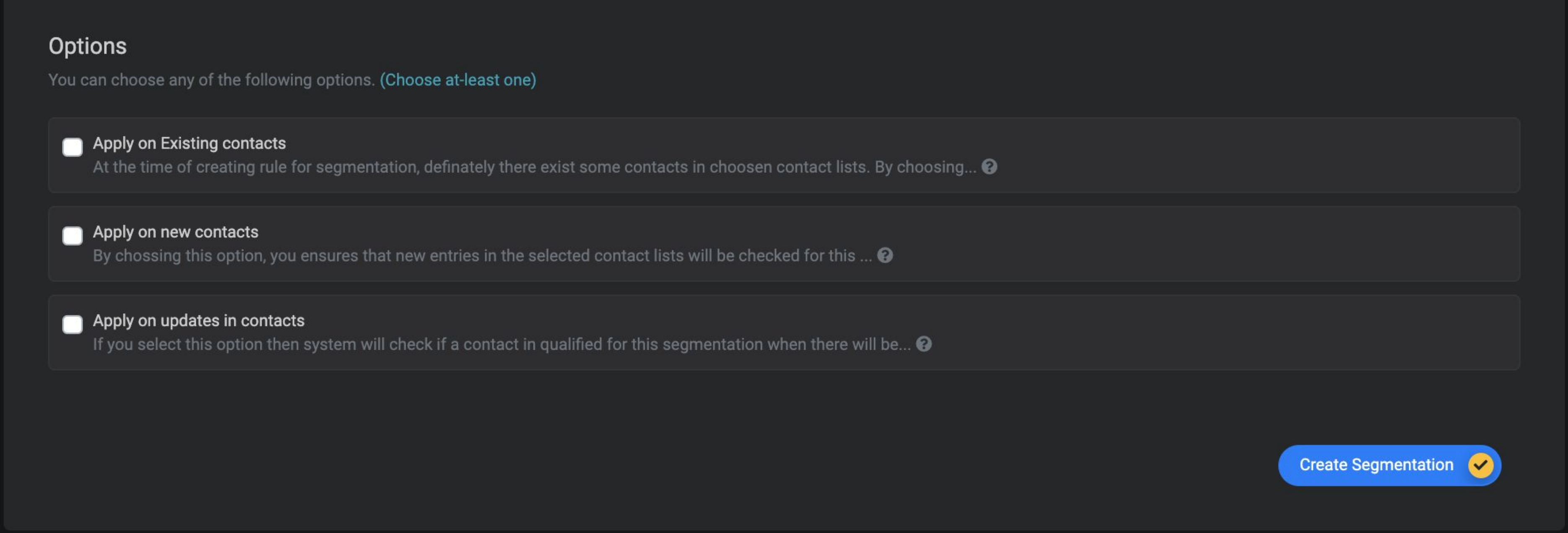
Segmentation - Create New



- **Name**
    - Give a name to your new segmented contact list.
- **Contact List**
    - Single List Segmentation: Rule applied for a single chosen contact list.
    - Multi-List Segmentation: Apply similar segmentation on more than one contact list at the same time. This will save you time in building similar segmentation over multiple lists one by one.
    - Choose the contact list where the segmentation rule is to be applied.
- **Some Important Points**
    - Segmentation can be used with normal campaigns and automation.
    - Segmentation can be used for messages that are custom-tailored to a customer’s preferences, past activities, location, and other variables that are much more likely to be attractive to a consumer over a mass mail that makes customers feel a number on a company’s email list. This can be achieved easily with Segmentation. Find contacts within your contact database who share similar traits - For example - 'doctors' living in a 'city' and have purchased a 'product' in the last '40 days'.



- If multiple contact lists are chosen then common custom fields will be listed as filters.
- Custom fields of the chosen contact list will be used to create the filter as per the requirement.
- Add as many conditions as needed in one filter or add another group of conditions for the second filter.
- Delete the group if not required by the direct delete icon.

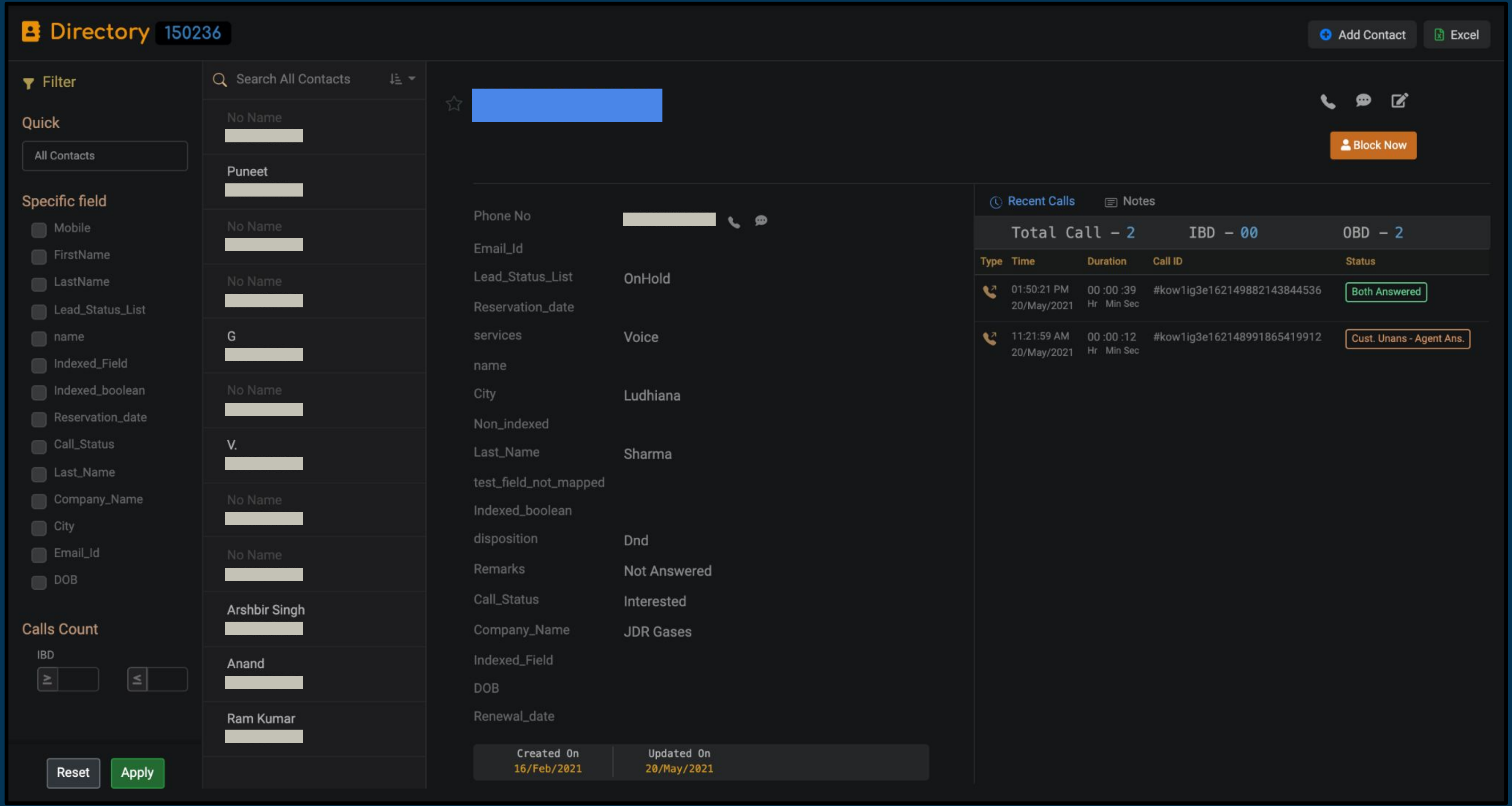


The user is free to choose all or any of the following options for applying the created segmentation rule.

- **Apply on existing contacts:** Already existing contacts are qualified for segmentation application. Rest will not be applicable.
- **Apply on new contacts:** Only the new contacts that are added after creating and applying segmentation on the contact list will be qualified for it.
- **Apply on updates in contacts:** Updates in already existing contacts will qualify this permission for application of segmentation.

Then click on CREATE SEGMENTATION.

Directory



Directory 150236
Add Contact
Excel
Filter
Quick
All Contacts
Specific field
Mobile
FirstName
LastName
Lead_Status_List
name
Indexed_Field
Indexed_boolean
Reservation_date
Call_Status
Last_Name
Company_Name
City
Email_Id
DOB
Calls Count
IBD
Reset
Apply
Search All Contacts
No Name
Puneet
No Name
No Name
G
No Name
V.
No Name
No Name
Arshbir Singh
Anand
Ram Kumar
Block Now
Phone No
Email_Id
Lead_Status_List OnHold
Reservation_date
services Voice
name
City Ludhiana
Non_indexed
Last_Name Sharma
test_field_not_mapped
Indexed_boolean
disposition Dnd
Remarks Not Answered
Call_Status Interested
Company_Name JDR Gases
Indexed_Field
DOB
Renewal_date
Created On 16/Feb/2021
Updated On 20/May/2021
Recent Calls
Notes
Total Call – 2
IBD – 00
OBD – 2
Type Time Duration Call ID Status
01:50:21 PM 20/May/2021 00 :00 :39 Hr Min Sec #kow1ig3e162149882143844536 Both Answered
11:21:59 AM 20/May/2021 00 :00 :12 Hr Min Sec #kow1ig3e162148991865419912 Cust. Unans - Agent Ans.

You will find all of your contacts and their summarised information on this page.

Your All Contacts means-

- All the numbers you have uploaded in your Contact Lists.
- All customers you have contacted via campaigns, quick calls, click-to-calls, etc.
- Whoever contacted you by calling on your DID numbers.
- Numbers that you have uploaded directly in the Directory.

You will get the following information of a contact-

- As you know, you can create custom fields and map them with multiple Contact Lists. You will get the latest value of each custom field in the Directory. This may include name, mobile number, address, email, date of birth, and many more.
- **Source:** This contains the source of insertion.
- Create date and latest update date.

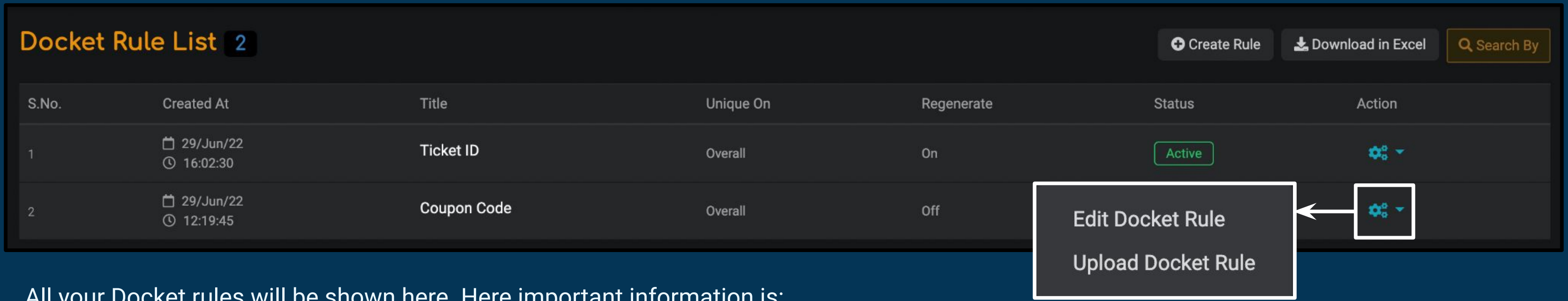
- Total number of calls on or by the number.
- List of recent 50 calls.
- Notes: Your agents can create notes on your customers. All the notes will be listed here.
- You can also mark a contact as VIP or Block it completely.

Analyze your customers-

You can analyze your customers using various filters and sorting options. Following is the list of filters-

- All the indexed custom fields
- Calls count
- VIP
- Blocked
- Create/ Update date

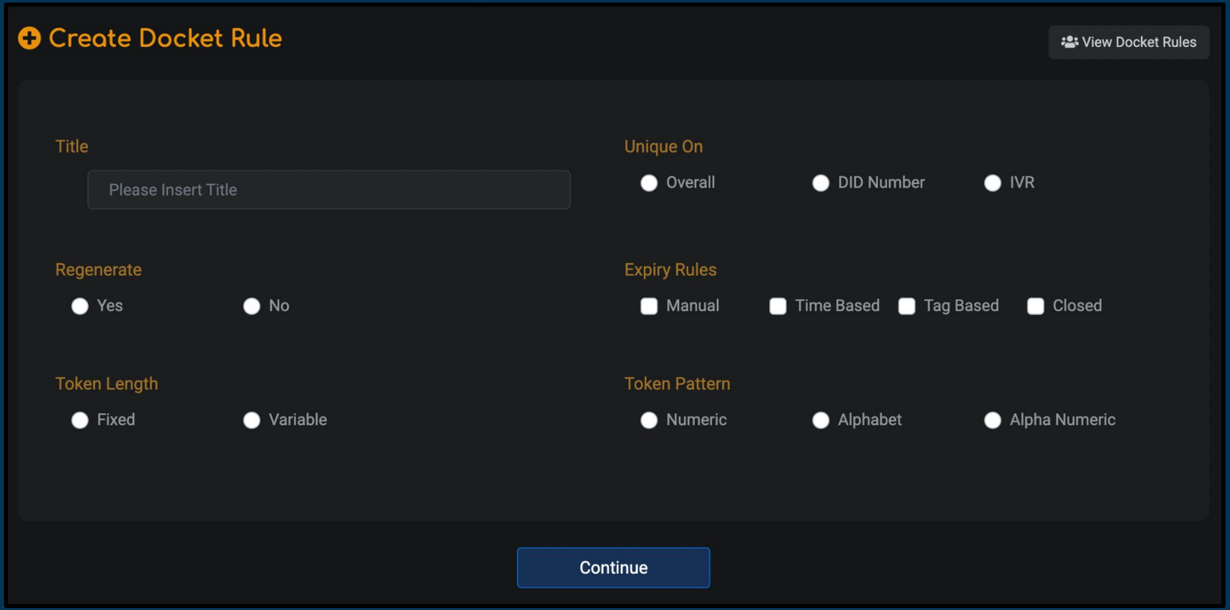
Docket



All your Docket rules will be shown here. Here important information is:

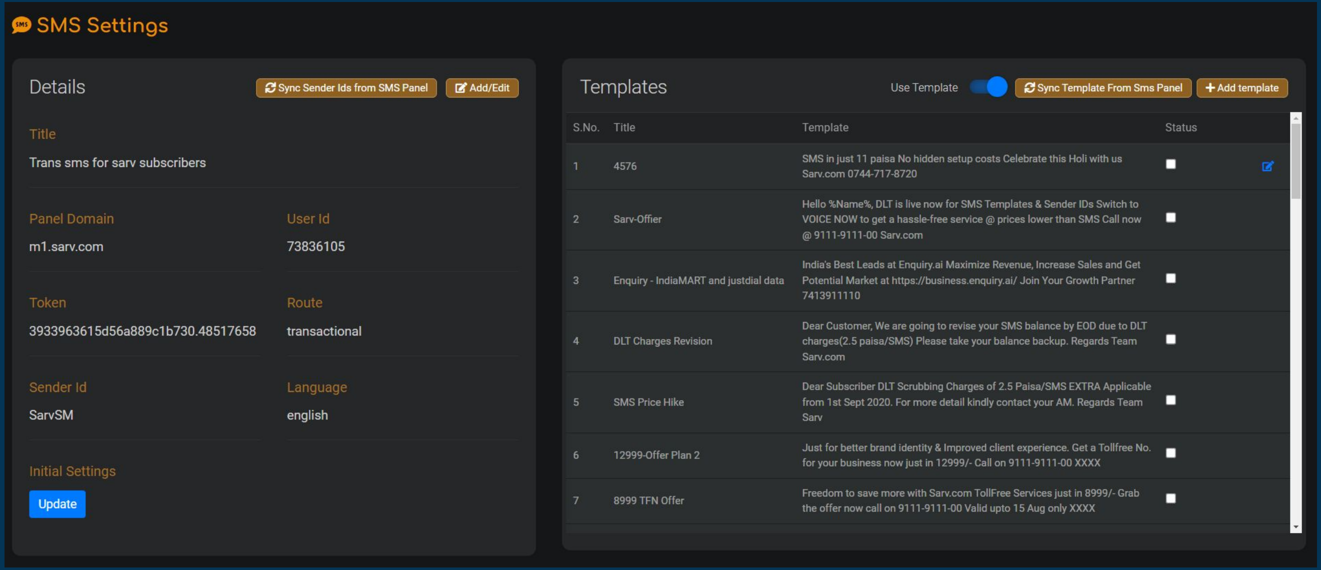
- Title
- Unique On
- Regenerate
- Status
- Action
    - Edit Docket Rule
    - Upload Docket Rule

Create Docket Rule



In this, there are various fields that need to be filled to create the Docket as per your requirements.
- Initially give the Title for the Docket.
- You can select “Yes/No” for regeneration.
- You can select the Token Length to be Fixed or Variable.
- You can select the “Unique On” feature from the available options like- Overall, DID Number, or IVR.
- You can choose the “Expiry Rules” as per usage like Manual, Time Based, Tag-Based, and Closed.
- You can select the “Token Pattern” from the available options like- Numeric, Alphabet, or Alpha Numeric.

SMS Module



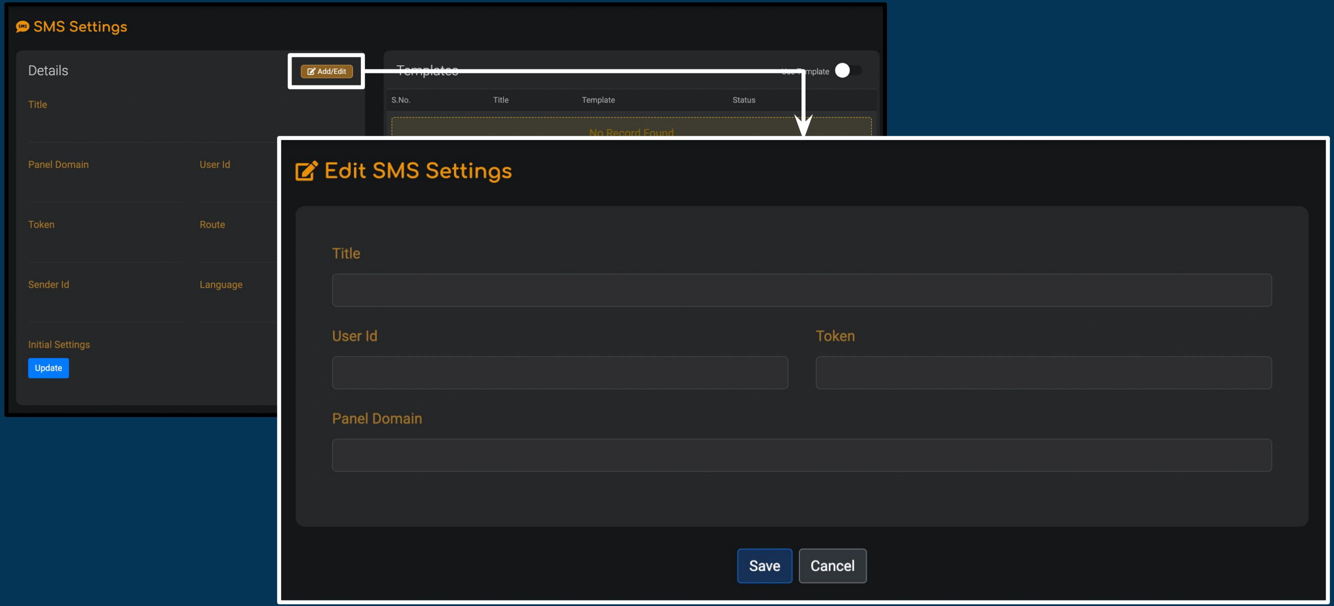
In the SMS Module, there are two portions on the screen which are - Details and Templates.

In Details, you will find the pre-filled information for the SMS Settings like Title, Panel Domain, User Id, Token, Route, Sender Id, and Language. You can edit this information by clicking on the Add/Edit button.

In Templates, there are predefined templates here, which you can differentiate on the basis of Title. You can select the Check Box to enable it.

You can also add a new template by clicking on the “Add Template” button, a dialog box will appear, you have to enter the Title and Template and click on “Submit SMS Template”.

SMS Module - Add/Edit



In the SMS Module, click on the “Add/Edit” button to Edit the SMS Settings.

A dialog box will appear, you have to enter the details for the fields like Title, User Id, Token, and Panel Domain.

Click on the Save button to save the SMS settings.

Tag

Title

- Name your tag as per its features & uses.

Description

- Yes: The description box will open.
- No: The description box will not open.

Login User

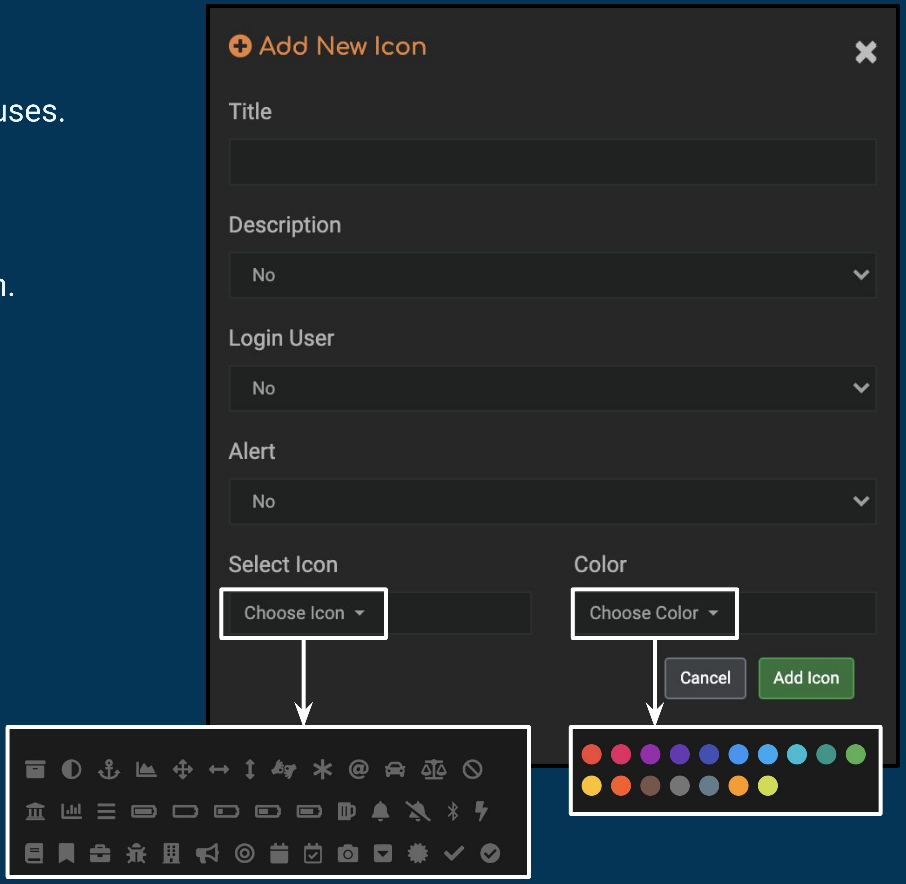
- Yes: The user needs to log in.
- No: The user doesn't need to log in.

Alert

- Yes: Sends alerts.
- No: Doesn't send alerts.

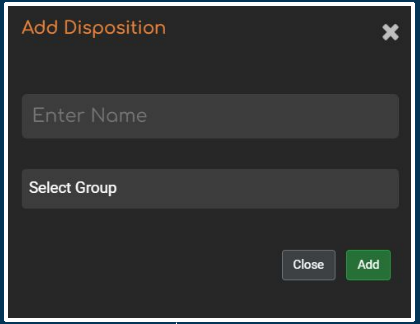
Select Icon

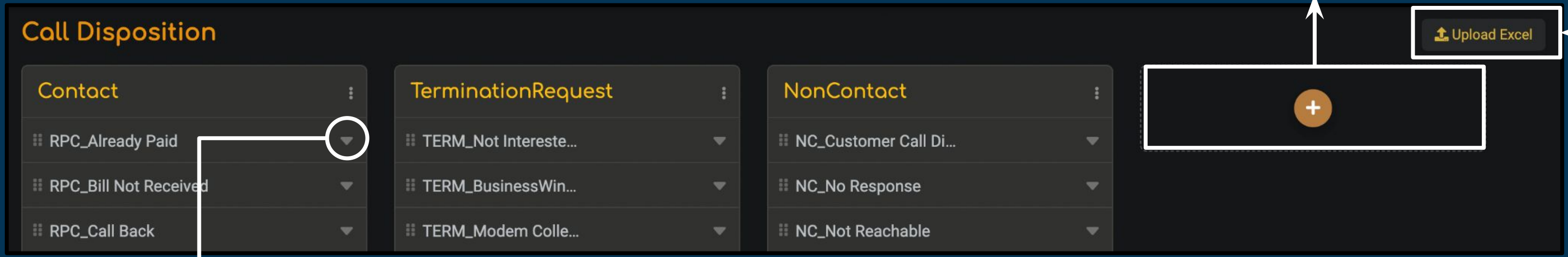
Color

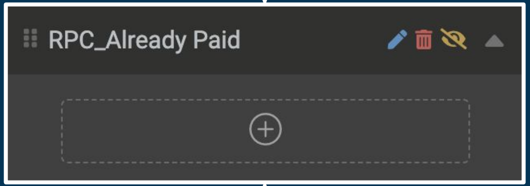


Call Disposition

To create another list of call tags along with agent groups.







These 3 functions are to Edit, Delete, or Hide a call tag from the list.

Use the Add icon to add a nested tag to a particular tag.

To upload a list of tags.

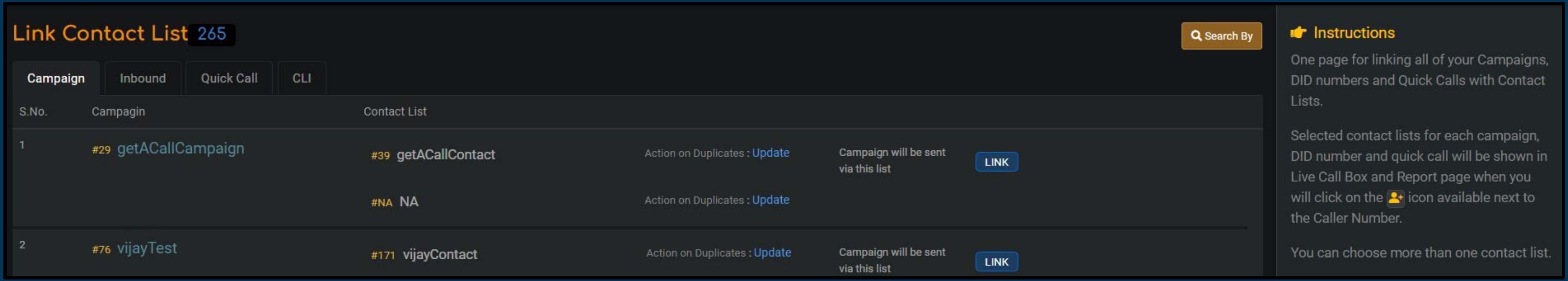
We have the option to have groups assigned for a separate disposition. Then, the agents of that particular group will have that disposition available.

We have given this feature to assign separate dispositions group-wise. The agent should be assigned to that particular group to assign Disposition.

If there is a common disposition that does not have any group assigned to it, then all the Agents will have access to that disposition.

In one scenario of the common disposition, it would be reflected to all the agents over the agent panel.

Link Contact List

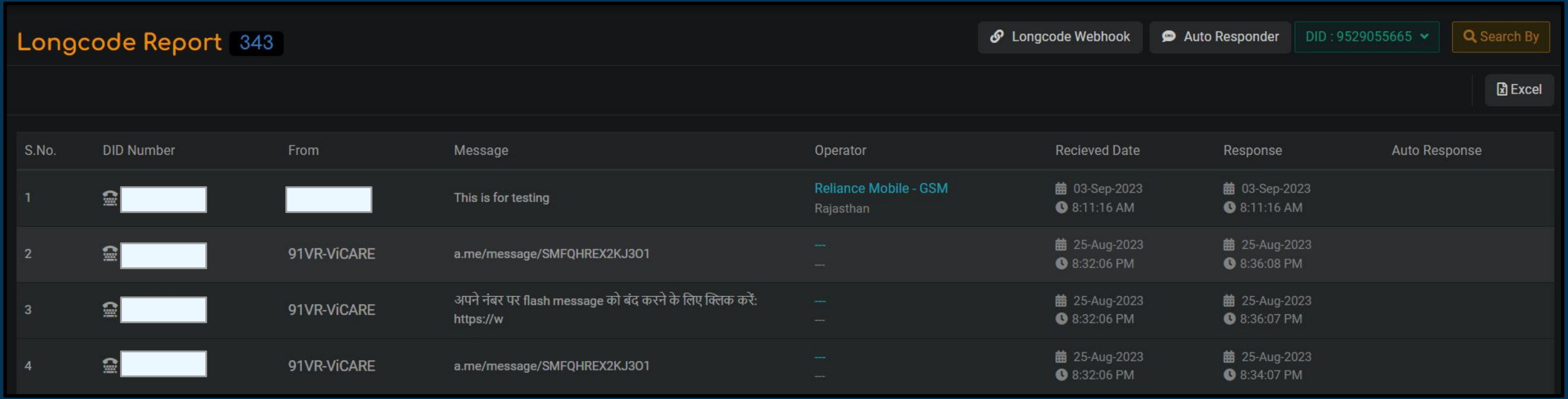


The link Contact List feature helps to mention the call notes by the Agent in the Contact List that is attached to the system at the time of receiving the call.

There are 4 types of instances where it can be used which are as follows-

1. Campaign
2. Inbound
3. Quick Call
4. CLI

Longcode


Longcode Report 343

Longcode Webhook | Auto Responder | DID : 9529055665 | Search By

Excel

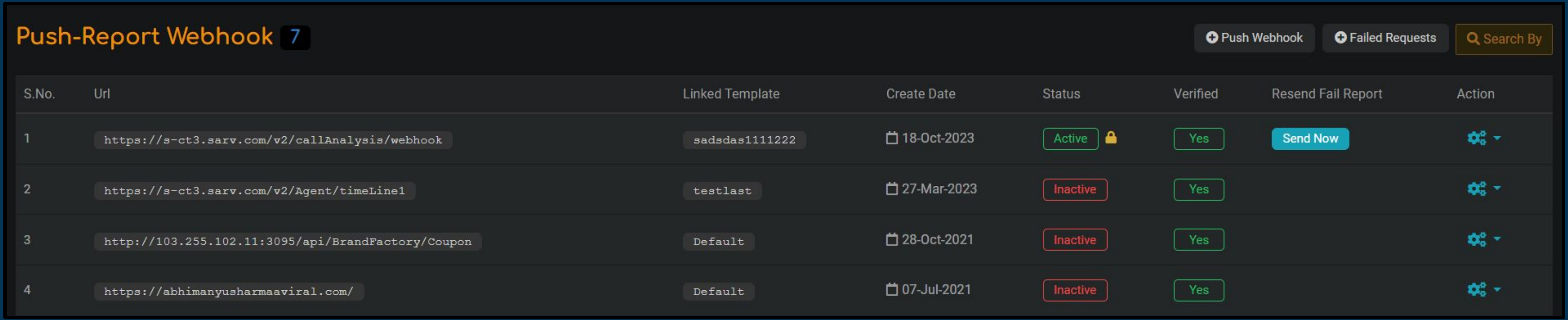
S.No.	DID Number	From	Message	Operator	Recieved Date	Response	Auto Response
1	[redacted]	[redacted]	This is for testing	Reliance Mobile - GSM Rajasthan	03-Sep-2023 8:11:16 AM	03-Sep-2023 8:11:16 AM	
2	[redacted]	91VR-ViCARE	a.me/message/SMFQHREX2KJ3O1	— —	25-Aug-2023 8:32:06 PM	25-Aug-2023 8:36:08 PM	
3	[redacted]	91VR-ViCARE	अपने नंबर पर flash message को बंद करने के लिए क्लिक करें: https://w	— —	25-Aug-2023 8:32:06 PM	25-Aug-2023 8:36:07 PM	
4	[redacted]	91VR-ViCARE	a.me/message/SMFQHREX2KJ3O1	— —	25-Aug-2023 8:32:06 PM	25-Aug-2023 8:34:07 PM	

A Long Code number is a 10-digit virtual number that creates a unique identity for the business. It is a standard phone number that allows businesses to receive SMS.

Long Code provides customer-to-business communication, helping businesses get feedback or gather any form of passive communication from their end clients.

It will help the business to have meaningful communication with targeted and relevant content. You can gather customer information for appointments, reminders, or confirmations.

Push-Report Webhook



Push-Report Webhook 7

Push Webhook | Failed Requests | Search By

S.No.	Url	Linked Template	Create Date	Status	Verified	Resend Fail Report	Action
1	https://s-ct3.sarv.com/v2/callAnalysis/webhook	sadsdas1111222	18-Oct-2023	Active	Yes	Send Now	
2	https://s-ct3.sarv.com/v2/Agent/timeLine1	testlast	27-Mar-2023	Inactive	Yes		
3	http://103.255.102.11:3095/api/BrandFactory/Coupon	Default	28-Oct-2021	Inactive	Yes		
4	https://abhimanyusharmaaviral.com/	Default	07-Jul-2021	Inactive	Yes		

Webhooks are important to integrate your CRM into Deepcall's environment. Report webhook is one of them. You can add multiple webhooks in the panel to get reports on your CRM. You can set different webhooks based on call type, DID numbers, campaigns, etc., or can simply set one webhook for all.

Once a webhook is added to the panel, the system will verify and activate it. To be an active webhook it should be a valid URL. Once it is active and verified, a webhook qualifies to receive reports on it. The system will send reports in JSON format.

Push report webhook helps users enable reports to be pushed to the user's platform. Set Default Webhook by following the link. Also, users can add more webhooks and failed requests can be checked & added.

Search Filter to make the searching easy.

Webhook Template

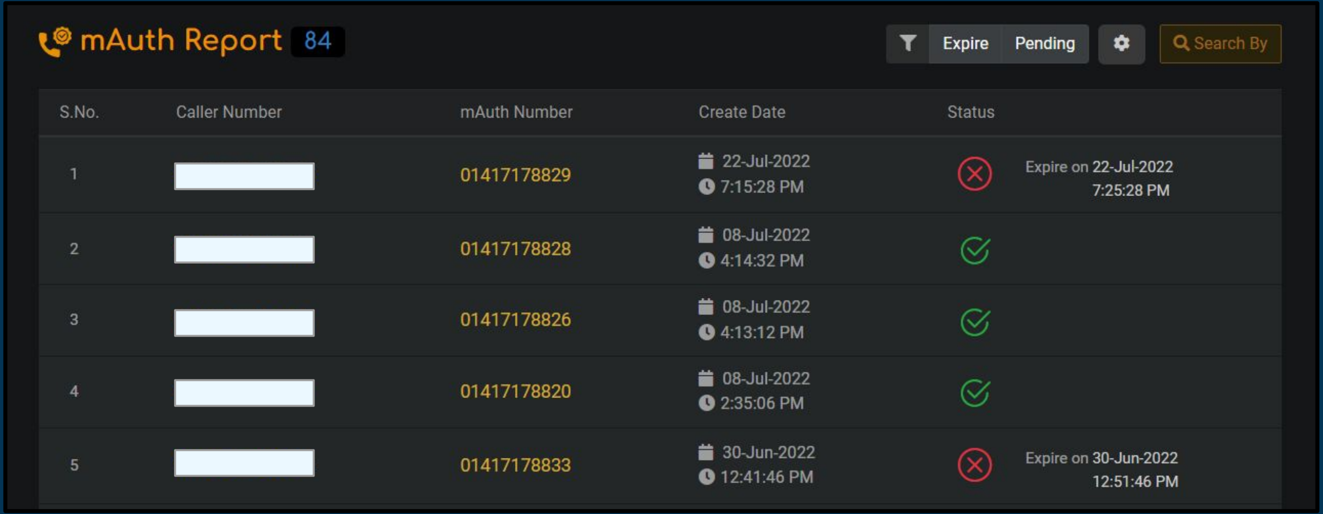
S.No.	Title	Headers	Body	Create Date	Action
1	TestNew	1	JSON	12-Oct-2023	
2	test	0	JSON	22-Oct-2021	

A webhook is an automated message from one system to another after a certain criteria has been met. In Braze, this criterion is usually the triggering of a custom event.

At its core, a webhook is an event-based method for two separate systems to take effective action based on data transmitted in real-time. That message contains instructions that tell the receiving system when and how to perform a specific task. Because of this, webhooks can provide you with more dynamic and flexible access to data and programmatic functionality, and empower you to set up customer journeys that streamline processes.

From here, we can create a Webhook Template and perform the Search By operation.

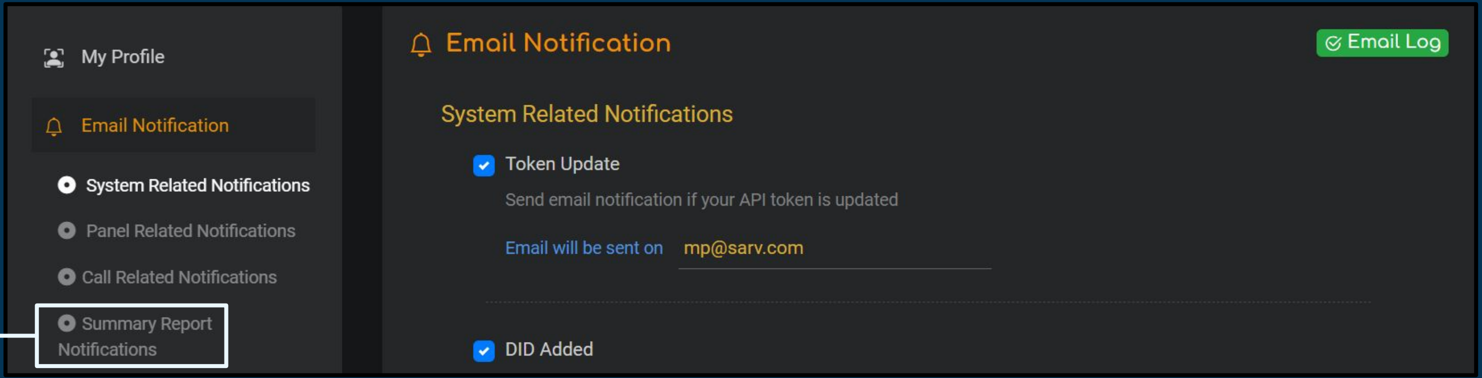
mAuth Report



mAuth Report serves as the important feature, it works for authentication where the user enters the Mobile Number, then the system will generate the Mobile Authentication(mAuth) Number on which you have to give a Missed Call. Then, your mobile number will be authenticated.

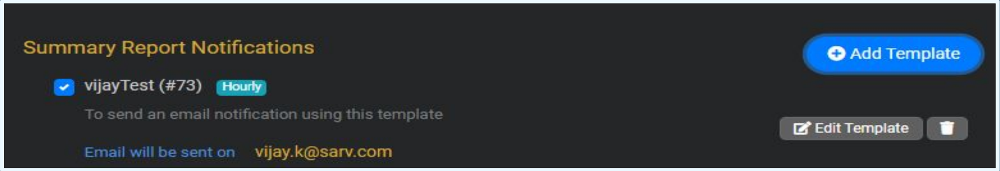
You can perform the Search By feature with the help of parameters like Caller Number, mAuth Number, Create Date, Create At, and Verify At.

Email Setting



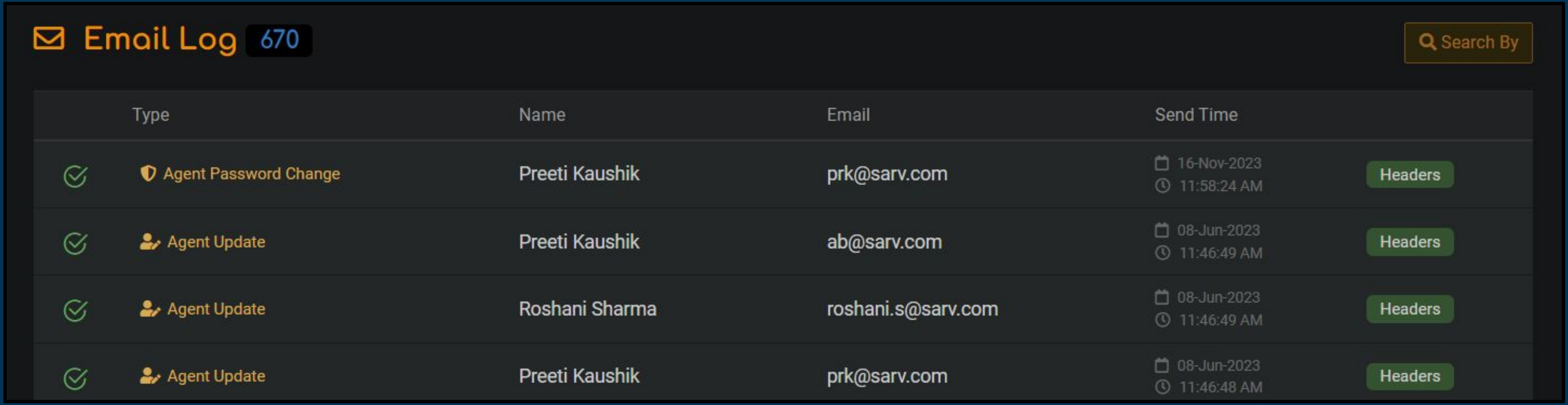
In Email Notification, select what type of notifications you need and on what email ID. You are free to choose different email IDs for different notifications.

Various types of Email Notifications are as follows- System Related Notifications, Panel Related Notifications, Call Related Notifications, and Summary Report Notifications.



Summary Report Notifications - From here, you can get reports in a preferred template of your own on a specific email ID.

Email Log



Email Log 670

Search By

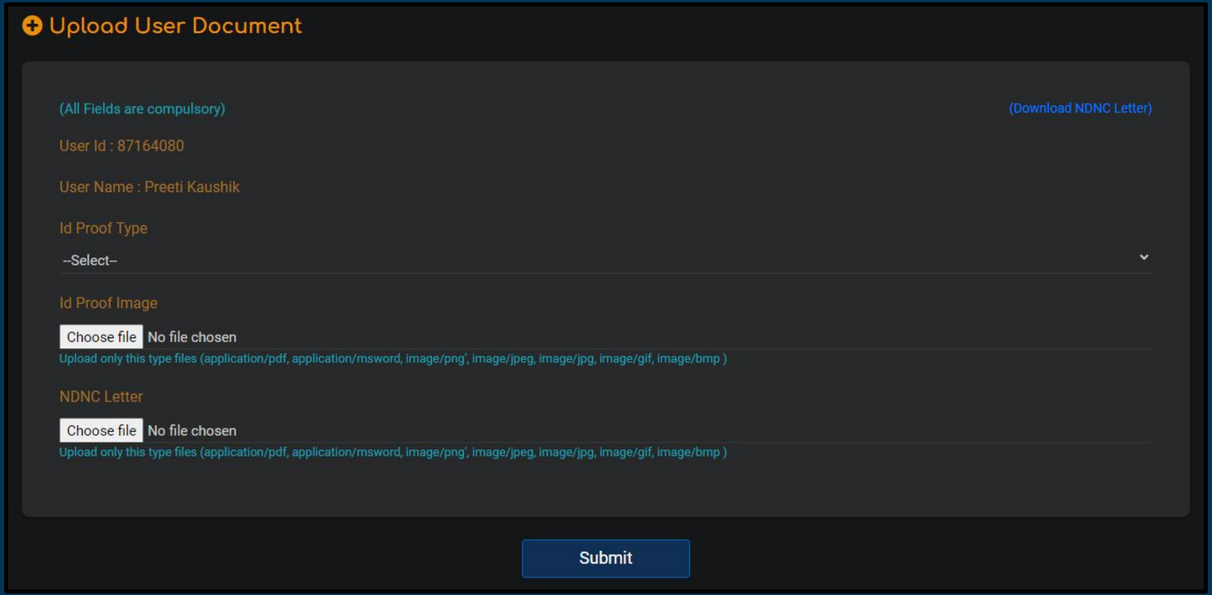
	Type	Name	Email	Send Time	
	Agent Password Change	Preeti Kaushik	prk@sarv.com	16-Nov-2023 11:58:24 AM	Headers
	Agent Update	Preeti Kaushik	ab@sarv.com	08-Jun-2023 11:46:49 AM	Headers
	Agent Update	Roshani Sharma	roshani.s@sarv.com	08-Jun-2023 11:46:49 AM	Headers
	Agent Update	Preeti Kaushik	prk@sarv.com	08-Jun-2023 11:46:48 AM	Headers

Email Log serves as the repository for the Emails that are sent/received in the system.

It will send you notifications for the modules that are going to expire so that you can renew them at the right time so that you don’t have to lose any subscriptions for your business.

It will send you an email reminder if there is new Agent Details are added or updated.

Upload Docs



Upload Docs is a functionality in DeepCall's Dashboard, it helps you to upload documents online easily without sending them physically which helps to save time and effort at the convenience of the system directly.

View Docs List

View My Uploaded Docs List 1

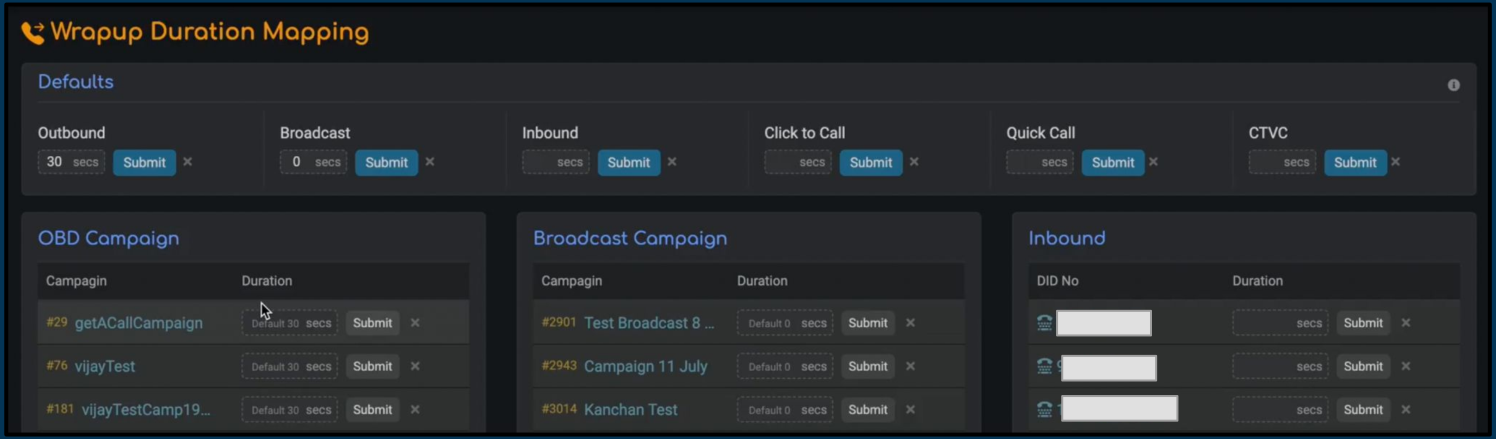
Search By

S.No.	UserId	Id Proof Type	Id Proof	NDNC Letter	Status	Create Date	Create By	Action Date	Action By
1	87164080	Passport	passport-2.jpg	viewUploadDocumentForm.pdf	Pending	04-Oct-2021 2:55:17 PM	87164080	--	--

View Docs List helps you to view the uploaded documents you have in the system.

It helps in storing the records for future use.

Wrap Up Duration Mapping

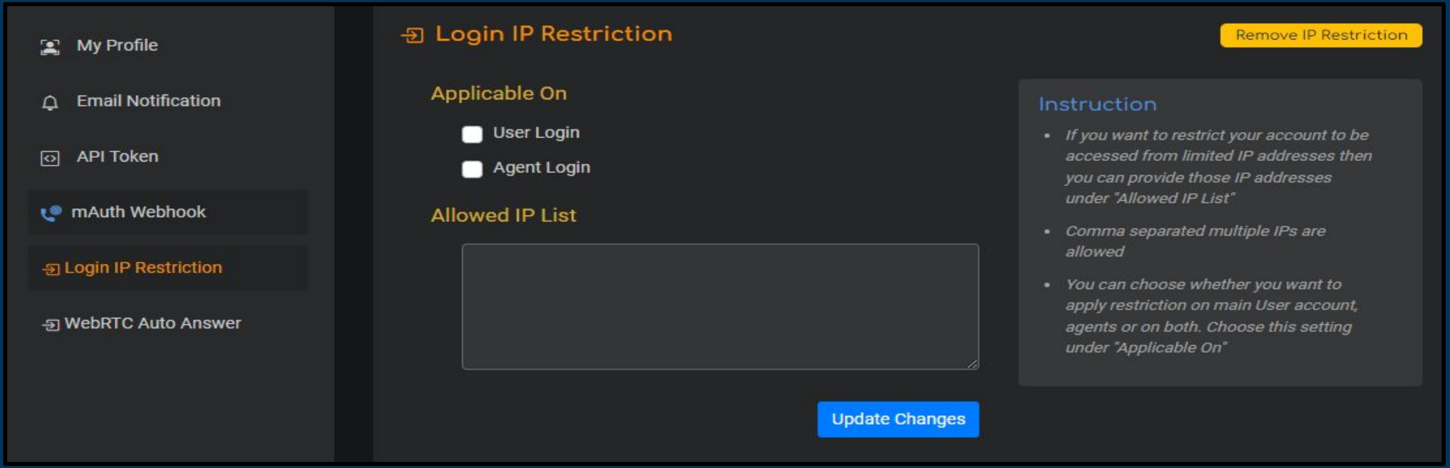


Here, set the interval between two calls, i.e. gap between attending or making a new call after hanging up the previous one.

Write the time in the default section to apply it to all the campaigns at once.

Click on the campaign name to set its time manually and different from the default time.

Login IP Restriction



You can whitelist the IP addresses, for those you want to have access to the Panel.

In this, if the user performs functions or runs the panel dashboard from any other system, then they will not be able to login to the Panel Dashboard unless their IP address is whitelisted.

API Backed Platform

- Voice Broadcast API
  - https://sarv.com/docs/telephony/voiceBroadcast.PHP.php
- Voice Broadcast API TTS
  - https://sarv.com/docs/telephony/voiceBroadcastTTS.PHP.php
- Fetch Voice Reports API
  - https://sarv.com/docs/telephony/fetchVoiceReport.PHP.php
- Upload Announcement API
  - https://sarv.com/docs/telephony/uploadAnnouncement.PHP.php
- Voice OTP
  - https://sarv.com/docs/voice-api.php
- Click To Call
  - https://sarv.com/docs/deepcall-click-to-call.php