Instruction for Desktop Agent

Version - 3.0.0

Essence Technology
Automation India Pvt. Ltd.

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1. Preface

1.1 Purpose of this document

This manual is intended for new users with little/no experience in using the SMART Desktop Agent.

1.2 Use of this document

The goal of this document is to give a broad overview of the main functions of Smart Desktop Agent and some basic instructions on how to use it. This document will concentrate on demonstrating interaction with SMART using the Desktop Agent.

1.3 Overview

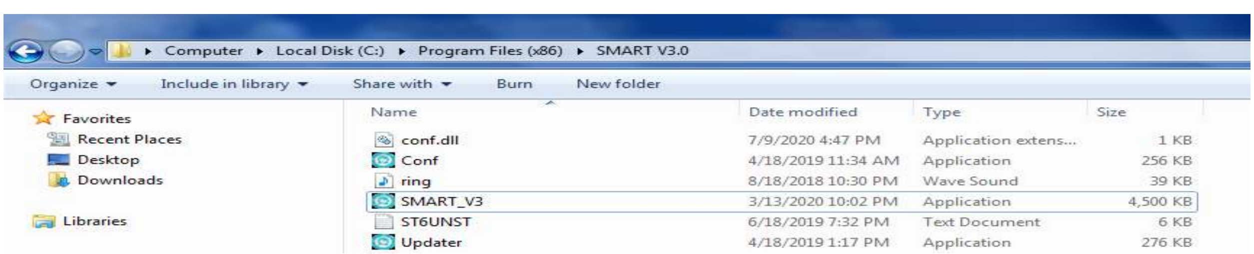
This preface is for information only (in very specific term the purpose & the use).

2. Login Module

The objective of this test is to verify that user logged in successfully through the Desktop Agent.

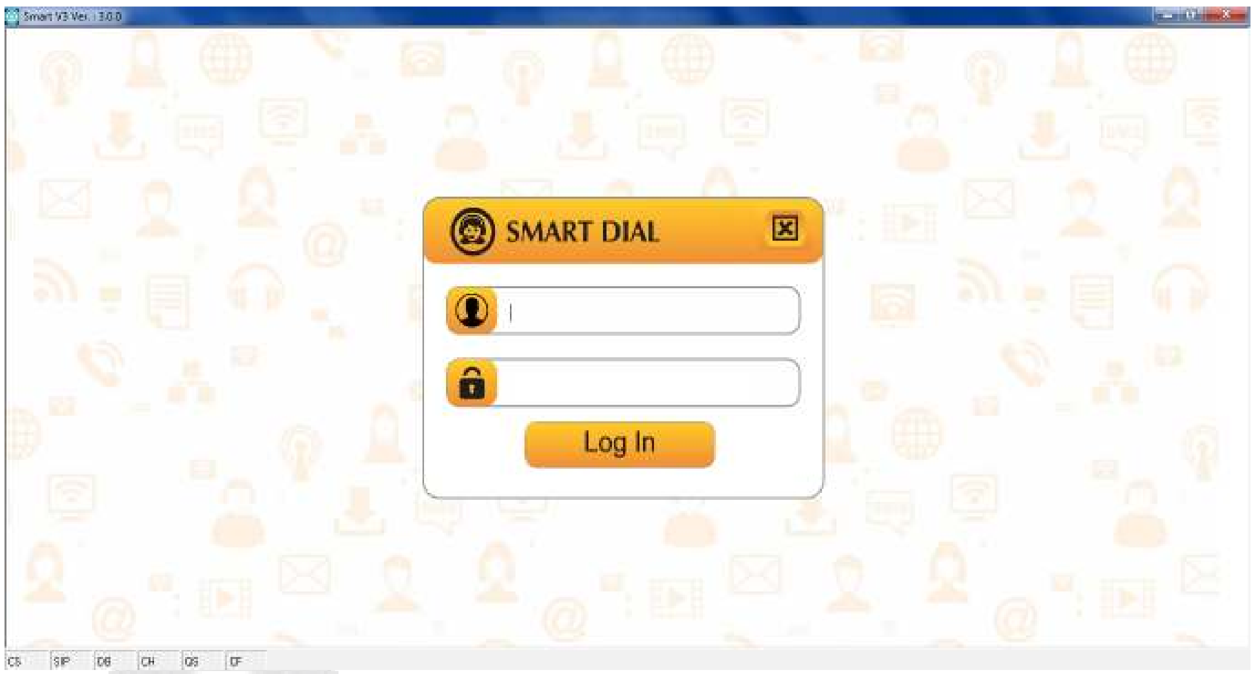
Step1: Two option for opening the desktop application

Option1 - Double click on C:\Program Files\SMART V3.0\SMART_V3.exe



Option2 - Double click on SMART_V3 shortcut link which created on desktop

Step2: After double clicked it should pop up a login screen for the username and password



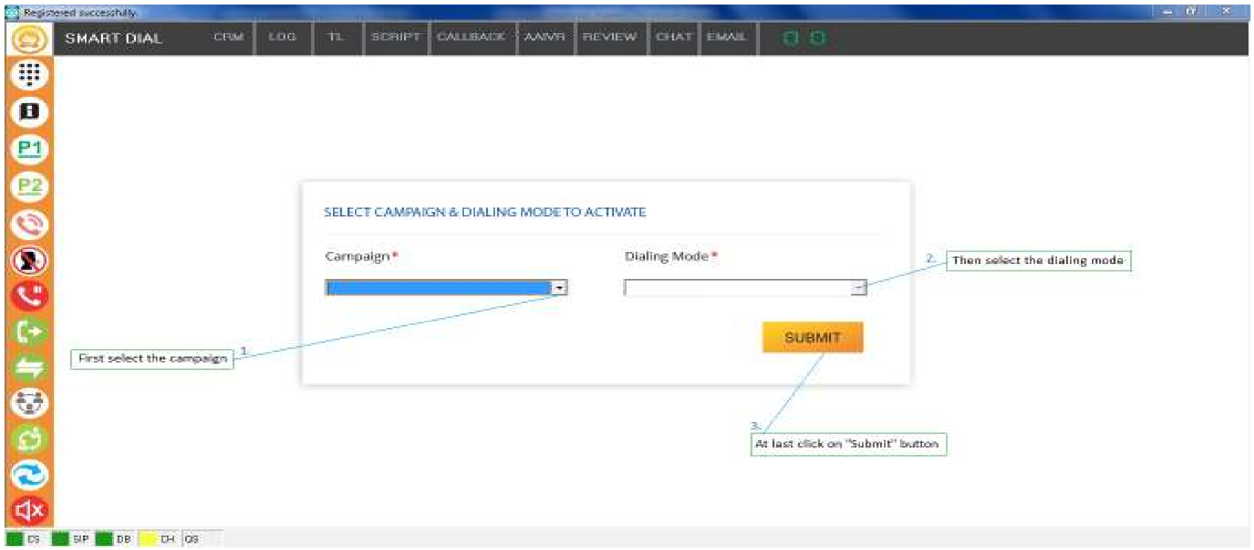
Step3: Then enter the login details as userid and password

Step4: Then click on “Log In” button or use enter key from keyboard for the next step

Step5: Two cases arise as:

Case1: If user has not the “Default Auto Login” permission

Step5.1: Then it should pop up a screen containing the campaign and mode selection



Step5.2: First select the campaign name from "campaign" selection option

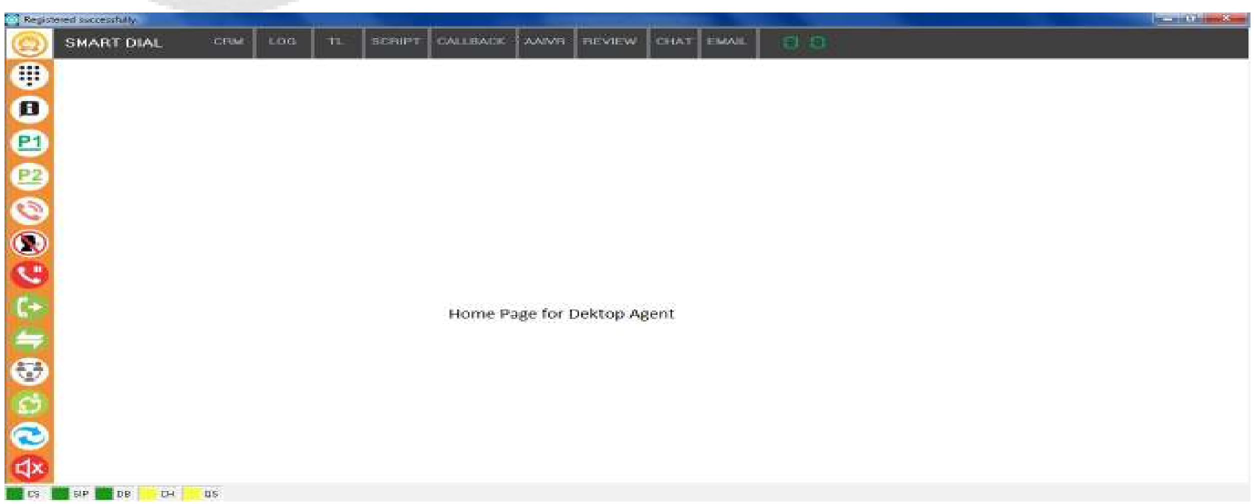
Step5.3: Then select the "Dialing Mode" from user mode option

Step5.4: At last click on Submit button to Login in the Desktop Agent

Case2: If user has the "Default Auto Login" permission

Step5.1: Then user automatically login in desktop agent with the default campaign and dialing mode

Step6: After successful login in desktop agent home page shows as follows:



Note: If campaign is not in schedule time then that campaign not comes for the selection.

3. Manual Dial

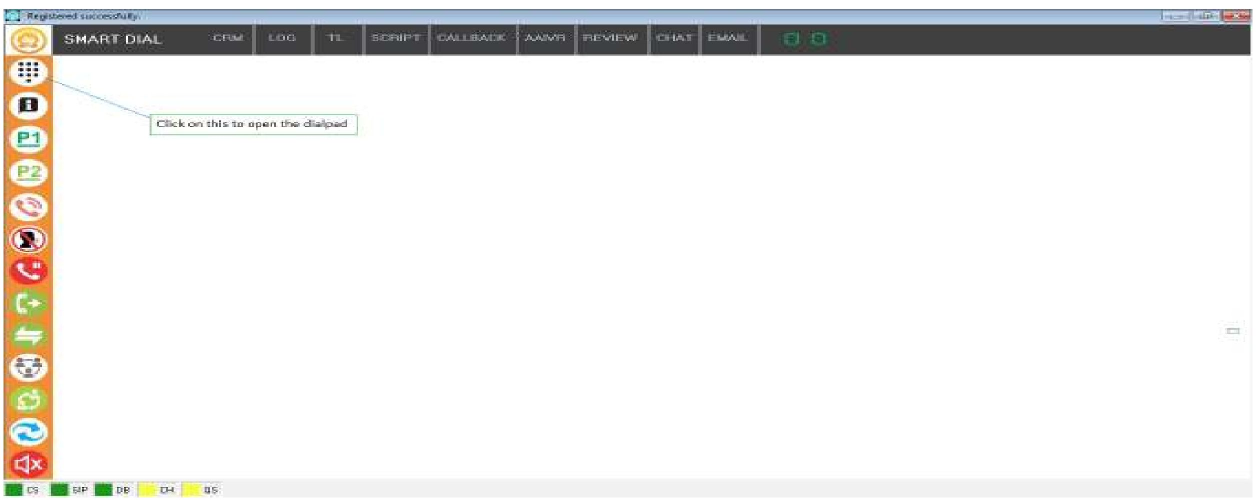
The objective of this test is to verify that manual call dialed successfully through the Desktop Agent.

3.1 Number Dial from Dial Pad

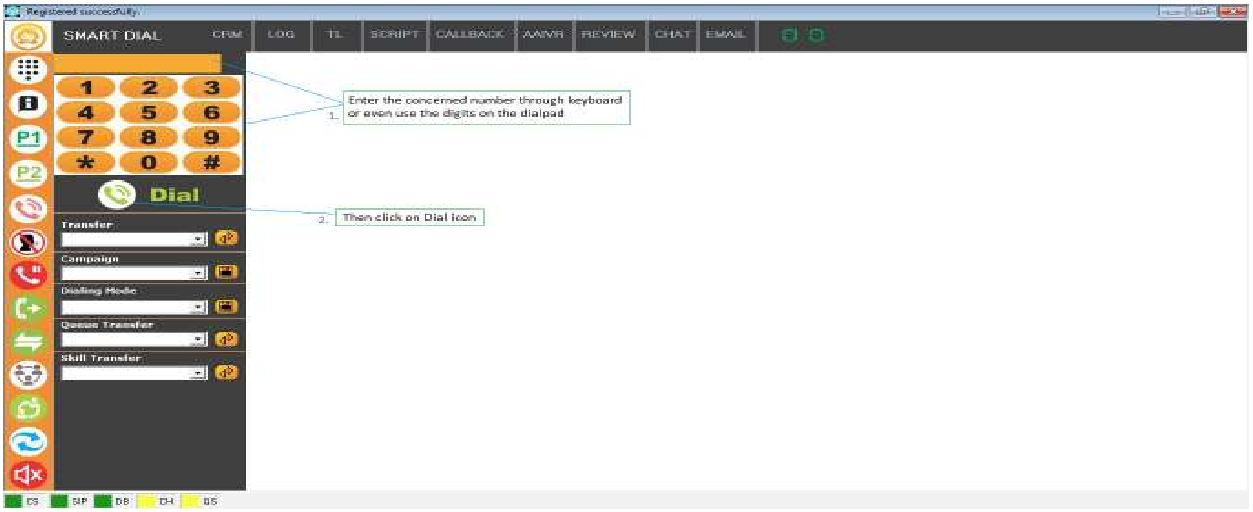
Step1: After successfully logged into the desktop agent

Step2: Dialing mode should be in Manual or Auto (if user has “Auto In Manual” permission) for manual dialing

Step3: Then click on  “DialPad” icon to open the DialPad option as shown below in screenshot

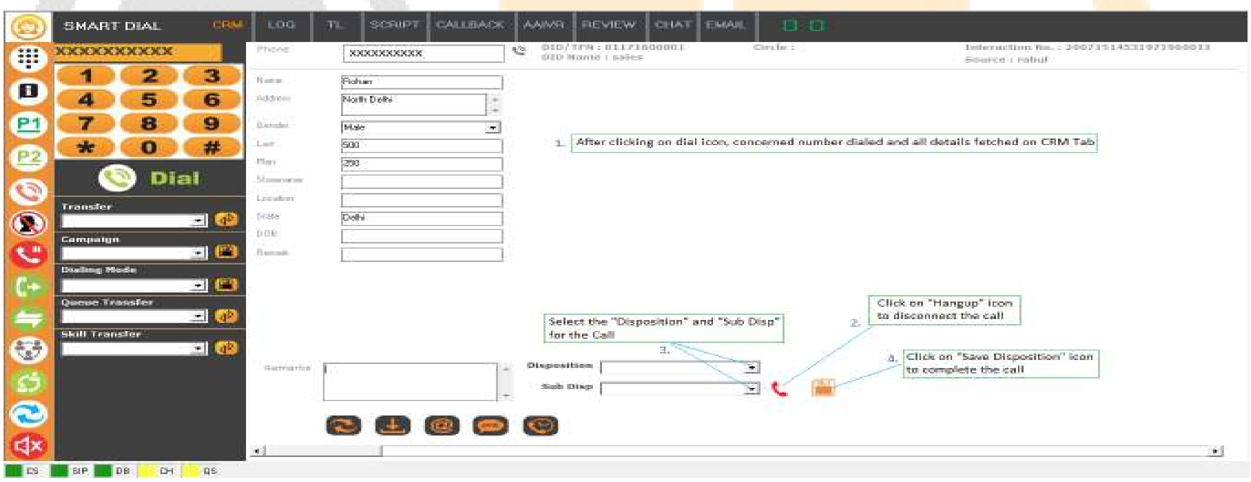


Step4: When dialpad option comes to user then enter the concerned number through keyboard or even use the digit on the dialpad



Step5: Then click on (Dial) icon for dial the number

Step6: After clicking on dial icon, concerned number dialed and all details fetched in CRM Tab if data available



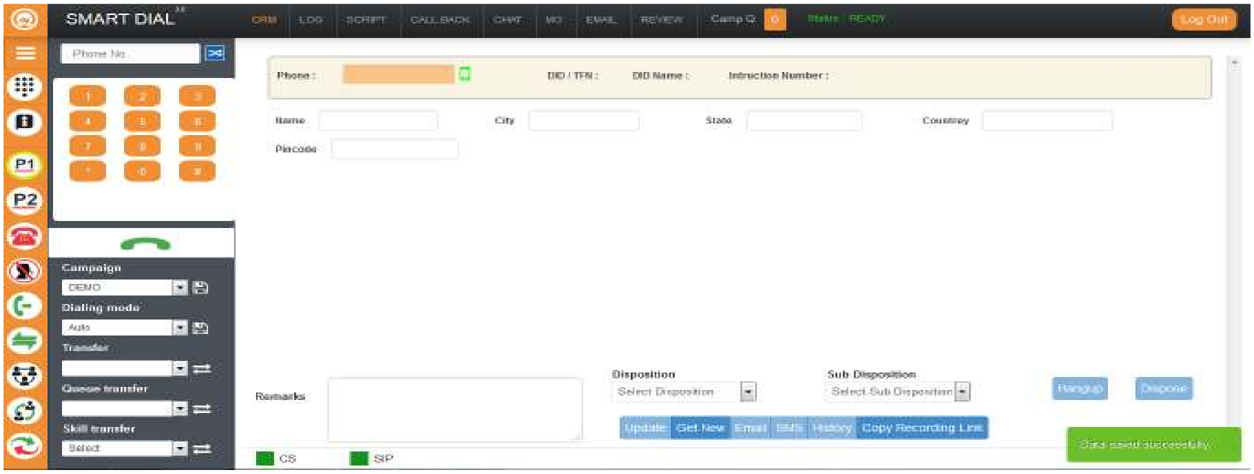
Step7: If call's completed and call not disconnecting by the concerned number then click on "Hangup" icon from default CRM Page for hangup the call

Step8: After that enter the details which are necessary in CRM fields

Step9: Then select the disposition with/without sub-disposition from Disposition and Sub Disp combo box

Step10: At last click on "Save Disposition" icon to save the disposition and complete the call

Step11: After call dispose, desktop agent ready for the next call.

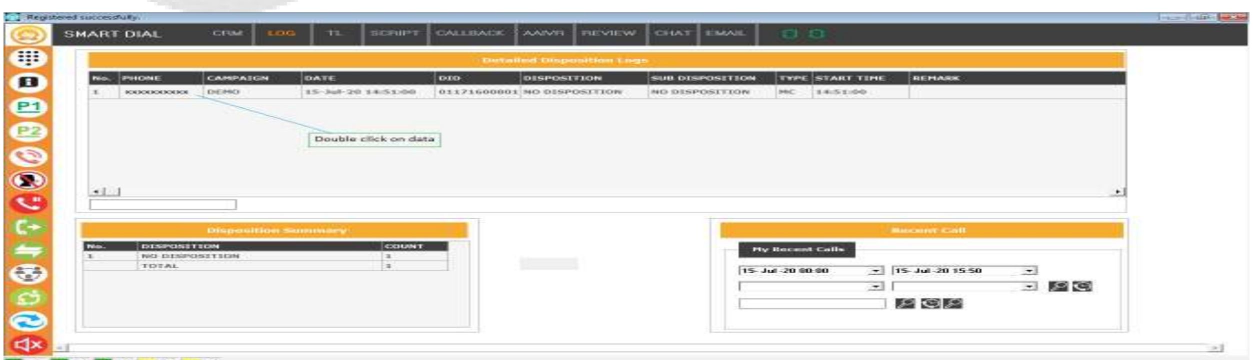


Note: "Auto In Manual" permission is necessary for Manual dialing in Auto mode

3.2 Number Dial from Log Tab

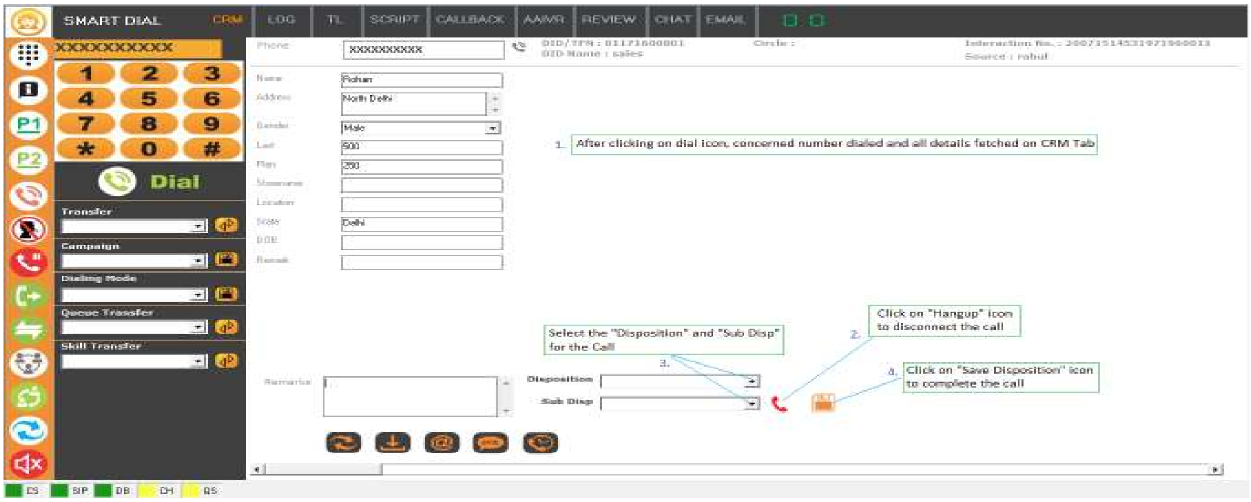
Step1: After successfully logged into the desktop agent and user wants to dial a data from Log Tab then click on Log Tab

Step2: After clicking on Log Tab, data is shown for the current date with the CRM fields in "Detailed Disposition Logs" section otherwise alert message shows as "No Record Found"



Step3: If you want to dial any number then double click on data as it shown in snapshot

Step4: After double clicking, concerned number is dialed and all the details fetched in CRM Tab if data available



Step5: If call's completed and call not disconnecting by the concerned number then click on "Hangup" icon from default CRM Page for hangup the call

Step6: After that enter the details which are necessary in CRM fields

Step7: After that select the disposition with/without sub-disposition from Disposition and Sub Disp combo box

Step8: At last click on "Save Disposition" button to save the disposition and complete the call

Step9: After disposition, desktop agent ready for the next call.

Note: "Auto In Manual" permission is necessary for Manual dialing in Auto mode

4. ACD (Inbound/Outbound Call)

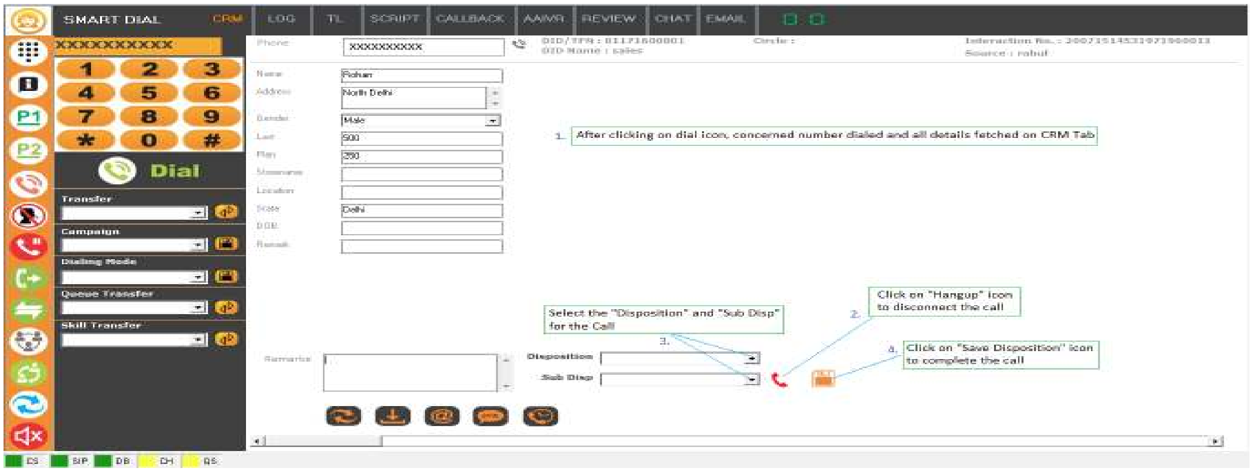
The objective of this test is to verify that user receive the inbound/outbound call from server successfully through the Desktop Agent.

Step1: After successfully logged into the Desktop agent

Step2: For Auto dialing user mode should be in Auto for taking the call from the server

Step3: If any call placed in a queue then it is transferred to the free agent

Step4: After the calls connection is successful with caller and user, the details are fetched in CRM as shown in below snapshot



Step5: If call's completed and call not disconnecting by the concerned number then click on "Hangup" icon from default CRM Page for hangup the call

Step6: After that enter the details which are necessary in CRM fields

Step7: Then select the disposition with/without sub-disposition from Disposition and Sub Disp combo box

Step8: At last click on "Save Disposition" button to save the disposition and complete the call

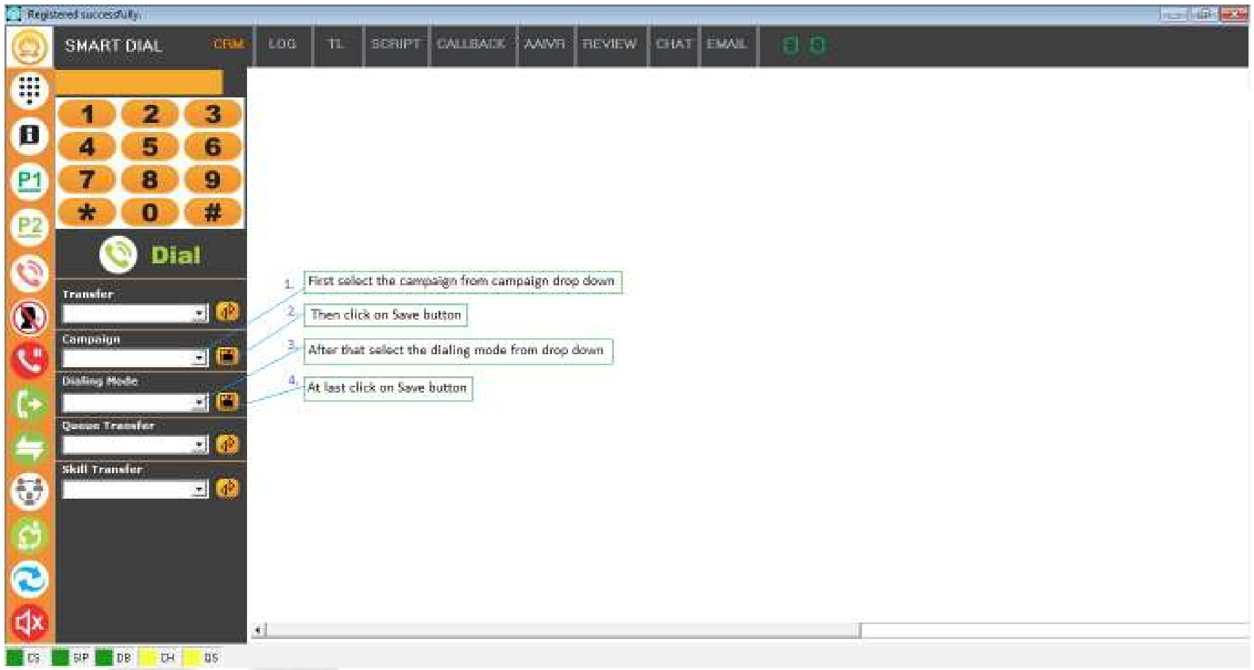
Step9: After disposition, desktop agent ready for the next call.

5. Campaign and MODE switch from Agent

The objective of this test is to verify that Campaign and Mode changed successfully through the Desktop Agent.

Step1: After successfully logged in to the Desktop Agent

Step2: If it's required to change the campaign



Step3: Then first select the campaign from Campaign drop down, which is available after opening the Dial-pad as shown in snapshot

Step4: Then click on icon to save the campaign

Step5: After that select the dialing mode from Dialing Mode drop down

Step6: At last click on icon to save the dialing mode

Step7: As clicking on "Save" icon, Campaign and mode changed successfully for the user.

6. Mute/UnMute Function

The objective of this test is to verify that Mute/UnMute Mic. function works properly through the Desktop Agent.

Step1: After successfully logged in to the Desktop Agent

Step2: Dial/Receive the call through the system

Step3: Concerned number details fetched in CRM panel if data available

Step4: After the calls connection successful with customer and user, if user wants to mute the mic during conversation

Step5: Then click on this icon as it shown in snapshot

Step6: After clicking on mute icon it mute the audio stream for user that means any words which says by the user will not hear to the other party

Step7: If user want to talk to the concerned person then click on this icon

Step8: If call's completed and call not disconnecting by the concerned number then click on "Hangup" icon from default CRM Page for hangup the call

Step9: After that enter the details which are necessary in CRM fields

Step10: Then select the disposition with/without sub-disposition from Disposition and Sub Disp combo box

Step11: At last click on "Save Disposition" button to save the disposition and complete the call

7. Blind Transfer Function

A **blind transfer** allows you to send a call to an agent without waiting for an answer or confirming the availability of the receiving party.

The objective of this test is to verify that blind transfer function works properly through the Desktop Agent.

Step1: After successfully logged into the Desktop Agent

Step2: Dial/Receive the call through the system

Step3: Concerned number details is fetched in CRM panel if data available

Step4: After the calls connection successful with customer and user

Step5: If it's required to transfer this call to any extension/number (as TL/others)

Step6: Enter the extension/number through keyboard or even use digits on the DialPad

Step7: Then click on (Blind transfer) icon for transferring the call

Step8: After clicking on blind transfer icon call should be automatically disconnected from desktop agent and customer call transferred to the entered extension/number (if agent then it should be in Auto mode with Ready status for receiving transferred call)

Step9: Then enter the details which are necessary in CRM fields

Step10: After that select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step11: At last click on "Save Disposition" button to save the disposition and complete the call

8. Attendant Transfer Function

An **attended transfer** is a **transfer** where before actually **transferring** to the destination, the call is put on hold and another call is initiated to confirm whether the end destination actually wants to take the call or not. These two calls are then merged together.

The objective of this test is to verify that Attendant transfer function works properly through the Desktop Agent.

Step1: After successfully logged into the Desktop Agent

Step2: Dial/Receive the call through the system

Step3: Concerned number details is fetched in CRM panel if data is available

Step4: After the calls connection successful with customer and user

Step5: If it’s required to transfer this call to any extension/number (as TL/others)

Case1:

Step6: Enter the concerned extension/number through keyboard or even use the digit on the DialPad

Step6.1: Then click on icon for dial the number

Step6.2: As 2nd call accepted by the user, line 1 automatically on the hold position

Case2:

Step6: Select the user from Transfer combo-box

Step6.1: Then click on “Atd. Transfer” icon

Step6.2: After clicking on “Atd. Transfer” icon, extension dial with the 2nd line

Step7: When line 2 number gets connected and he/she wants to talk with line 1 person

Step8: Then click on (Attendant transfer) icon for transferring the call

Step9: After clicking on Attendant transfer icon, call should be automatically disconnected from agent and customer call transferred to the concerned extension/number

Step10: Then enter the details which are necessary in CRM fields

Step11: After that select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step12: At last click on “Save Disposition” button to save the disposition and complete the call

Step13: After call dispose, Desktop Agent ready for the next call

9. Call Conference Function

Conference call is a phone call that interconnects three or more phones simultaneously.

The objective of this test is to verify that call conference function works properly through the Desktop Agent.

Step1: After successfully logged into the Desktop Agent

Step2: Dial/Receive the call through the system

Step3: Concerned number details is fetched in CRM panel if data available

Step4: After the calls connection is successful with customer and user

Step5: If it's required to conference this call to any extension/number (as TL/others)

Step6: Then enter the concerned extension/number through keyboard or even use the digit on the DialPad

Step7: After that click on icon for dial the number

Step8: As 2nd call accepted by the user, line 1 automatically on the hold position

Step9: When line 2 number gets connected and he/she wants to talk with line 1 person

Step10: Then click on (Conference) icon for conference the call

Step11: After clicking on Conference button, call should be automatically connected with the agent, customer and line 2 concerned person

Step12: When calls completed of conference, Hang-up the call by clicking on "Hangup" icon

Step13: After that enter the details which are necessary in CRM fields

Step14: Then select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step15: At last click on "Save Disposition" button to save the disposition and complete the call

Step16: After disposition, Desktop Agent ready for the next call

10. Campaign Transfer Function

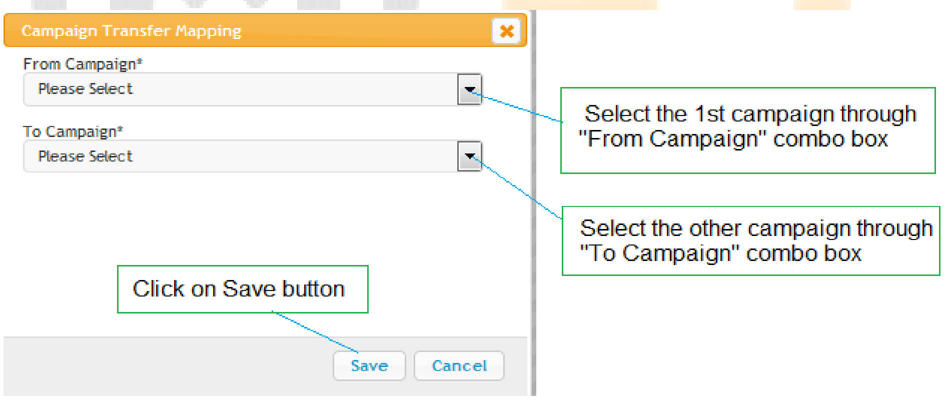
Campaign transfers occur when an agent transfers a call to another campaign after informing customer that we are transferring your call to right department.

Campaign transfer mapping permission through client panel

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

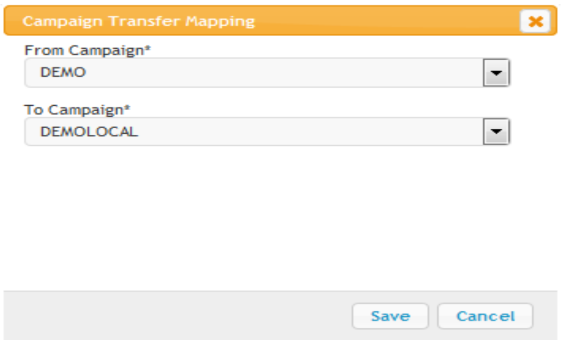
Step2: After that click on Plus (+) icon to add data in "Campaign Transfer Mapping" option

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



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

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



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

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

Campaign transfer function check through the Desktop Agent

The objective of this test is to verify that campaign transfer function works properly through the Desktop Agent.

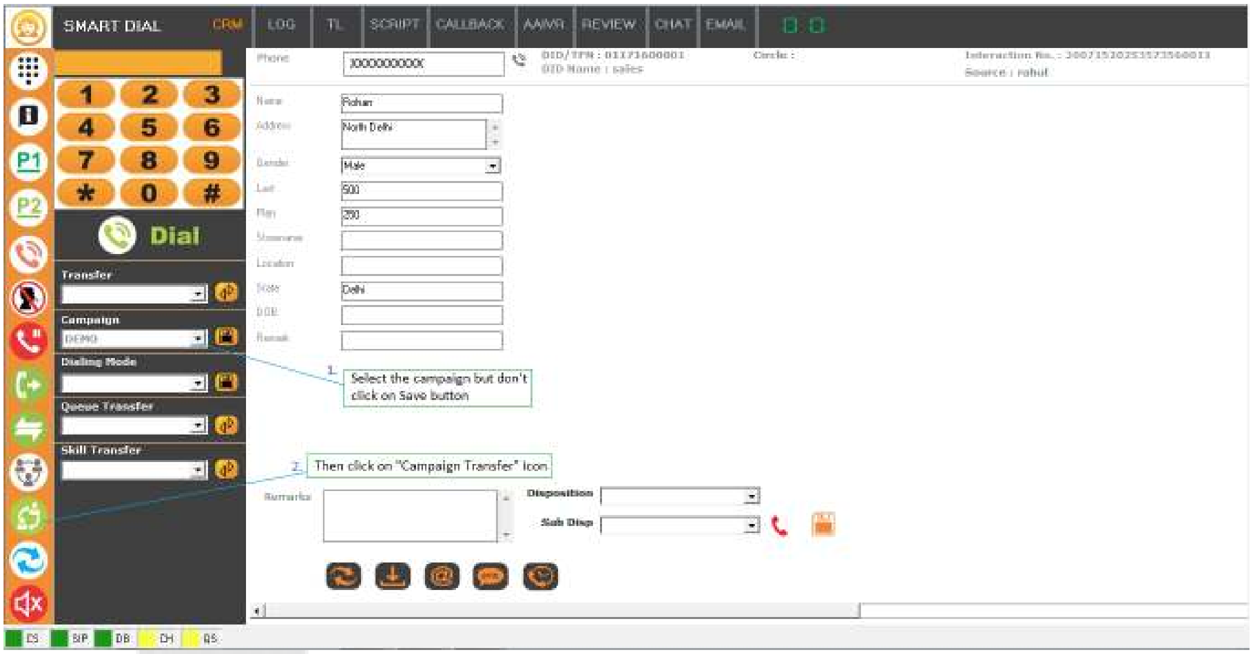
Step1: After successfully logged into the Desktop Agent

Step2: Dial/Receive the call through the system

Step3: Concerned number details is fetched in CRM panel if data available

Step4: After the calls connection are successful with customer and user

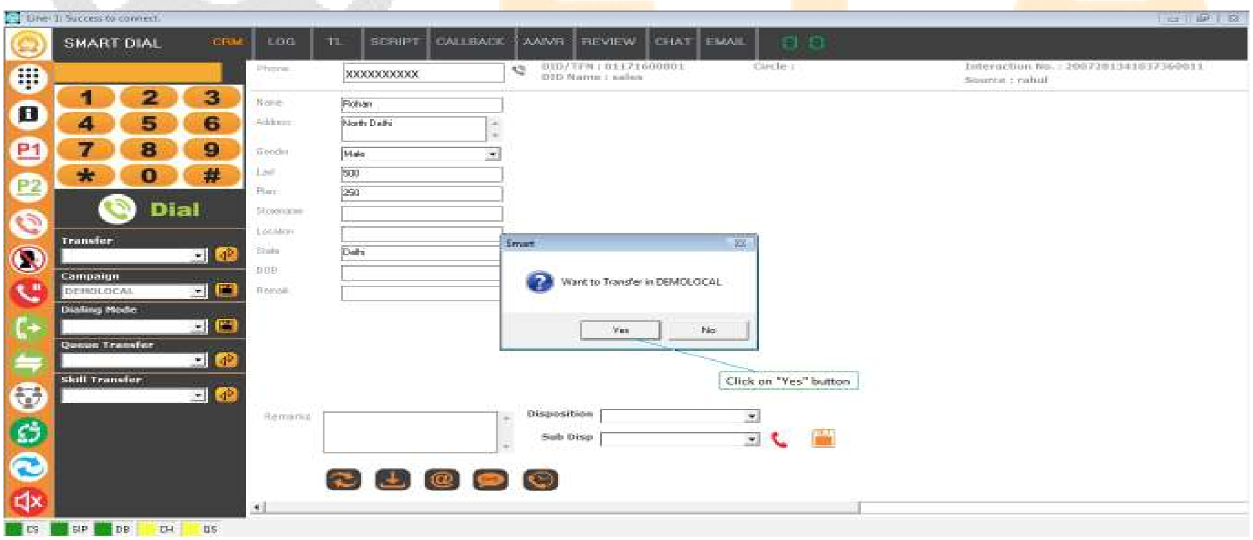
Step5: If it's required to call transfer to other campaign



Step6: Then select the campaign but don't click on "Save" button

Step7: After that, click on Campaign Transfer icon

Step8: As we click on campaign Transfer icon a dialog box open for the confirmation as "Want to transfer in XXXXXXXXX" with the option 'Yes' and 'N0'



Step9: Then click on "Yes" button for transferring this call to selected campaign

Step10: After clicking on “Yes” button, call should be automatically disconnected from Desktop agent and call transferred to the selected campaign (if agent available and free in transferred campaign then call transferred to the agent)

Step11: Then enter the details which are necessary in CRM fields

Step12: After that select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step13: At last click on “Save Disposition” button to save the disposition and complete the call

Step14: After call dispose, Desktop agent is ready for the next call

11. Campaign queue Transfer Function

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.

To apply the queue transfer technique, it is acquired to

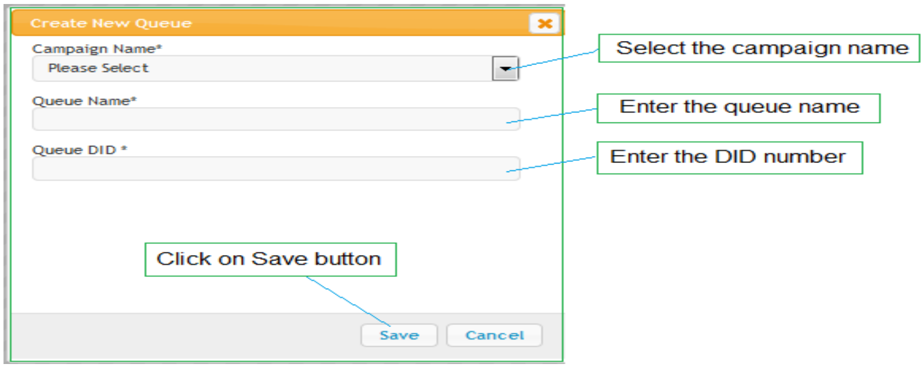
(i) Create the campaign queue through client panel
(ii) Then map the first campaign queue to another campaign queue through Q2Q Mapping

<u>Campaign Queue creation through client panel</u>

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

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

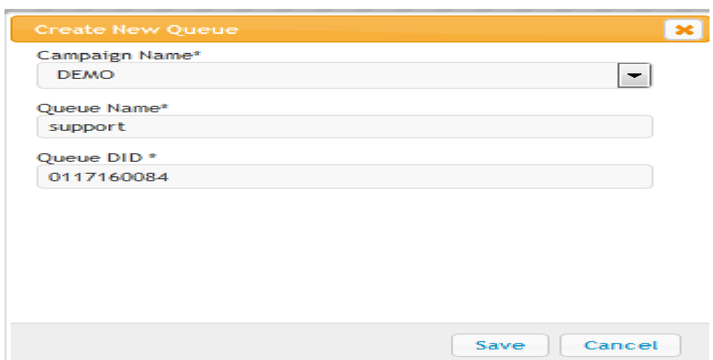
Step3: “Create New Queue” dialog box appears as follows:



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

Step5: Then enter the `queue name` for DID

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



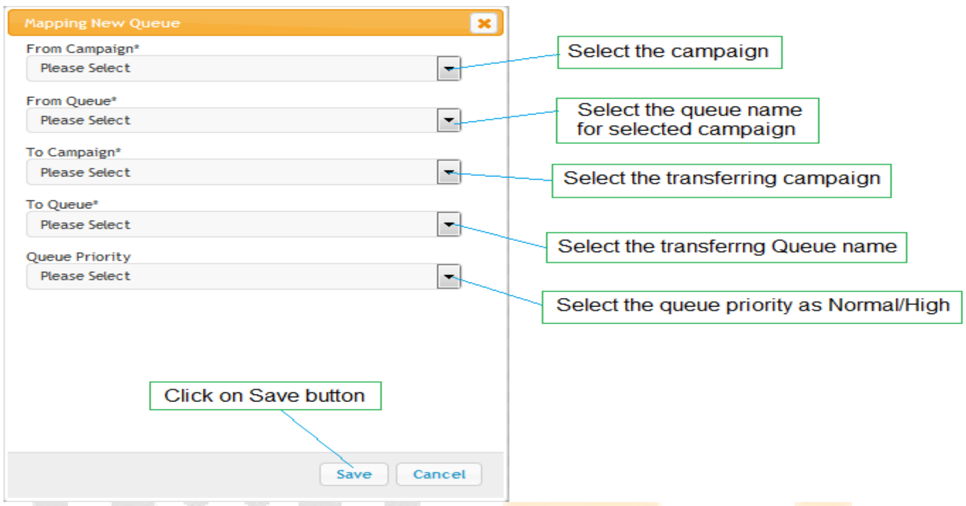
Step7: At last click on "Save" button to save the data.

Q2Q Mapping

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

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

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



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

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

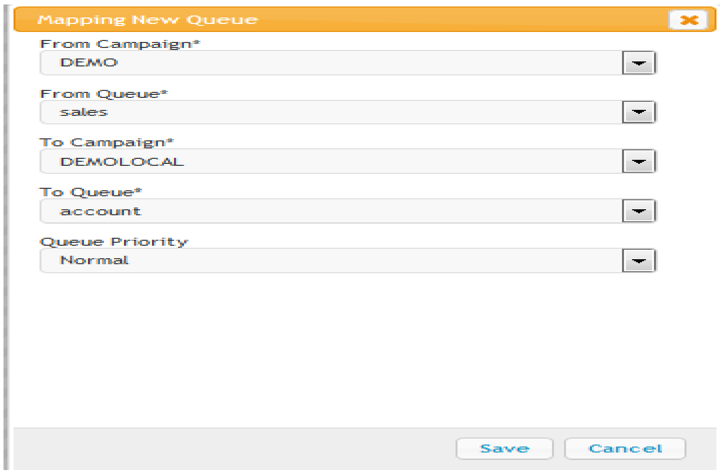
Step13: Then select the queue name from “From Queue” combo box

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

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

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

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



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

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

Campaign queue transfer function check through the Desktop Agent

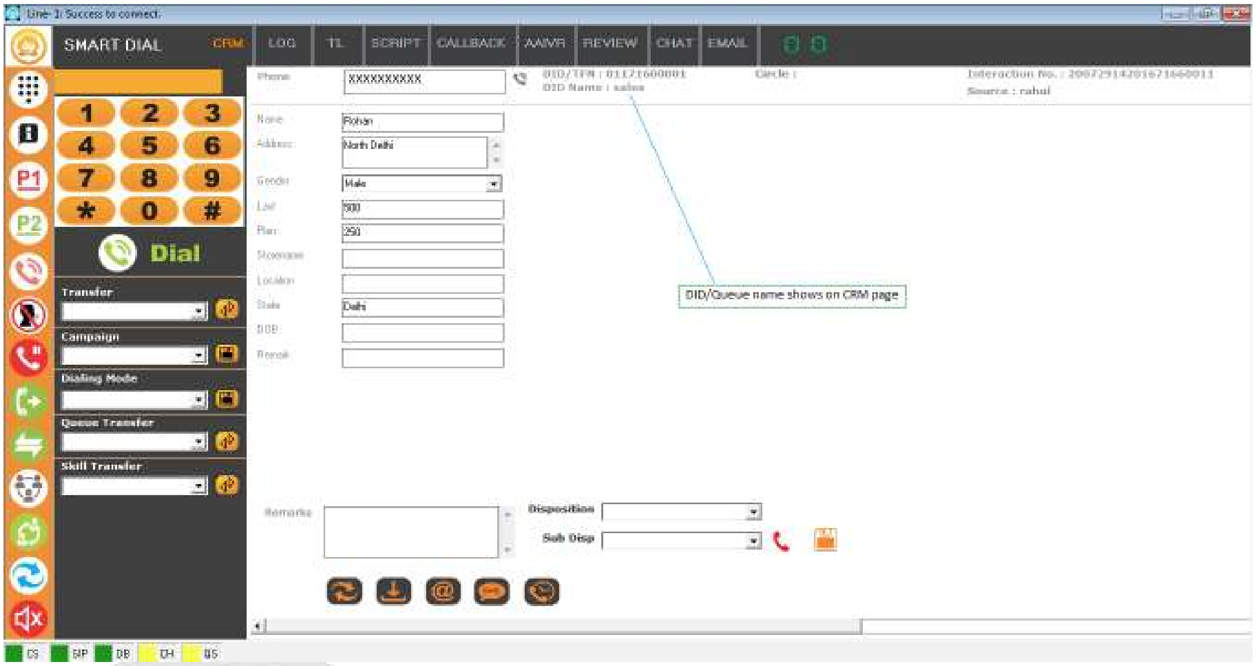
The objective of this test is to verify that campaign queue transfer function works properly through the Desktop Agent.

Step1: After successfully logged into the Desktop Agent

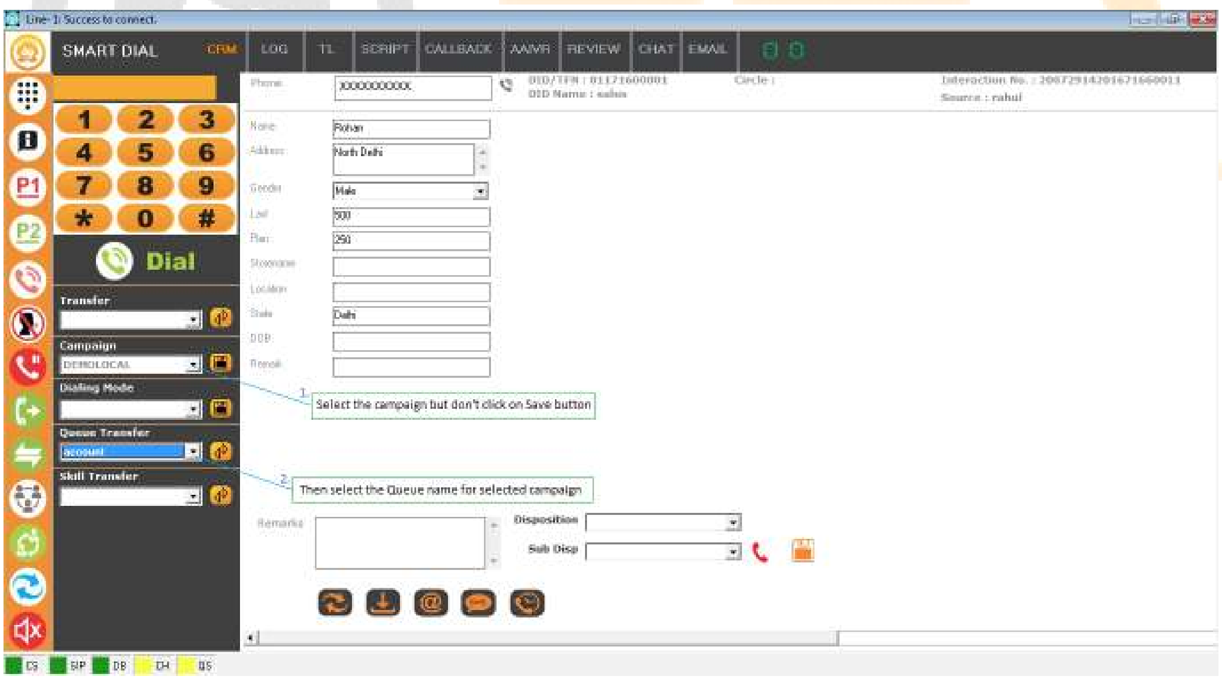
Step2: Dial/Receive the call through the system

Step3: Concerned number details is fetched in CRM panel if data is available

Step4: After the calls connection successful with customer and queue name shown in CRM page then user able to transfer this call to another campaign queue

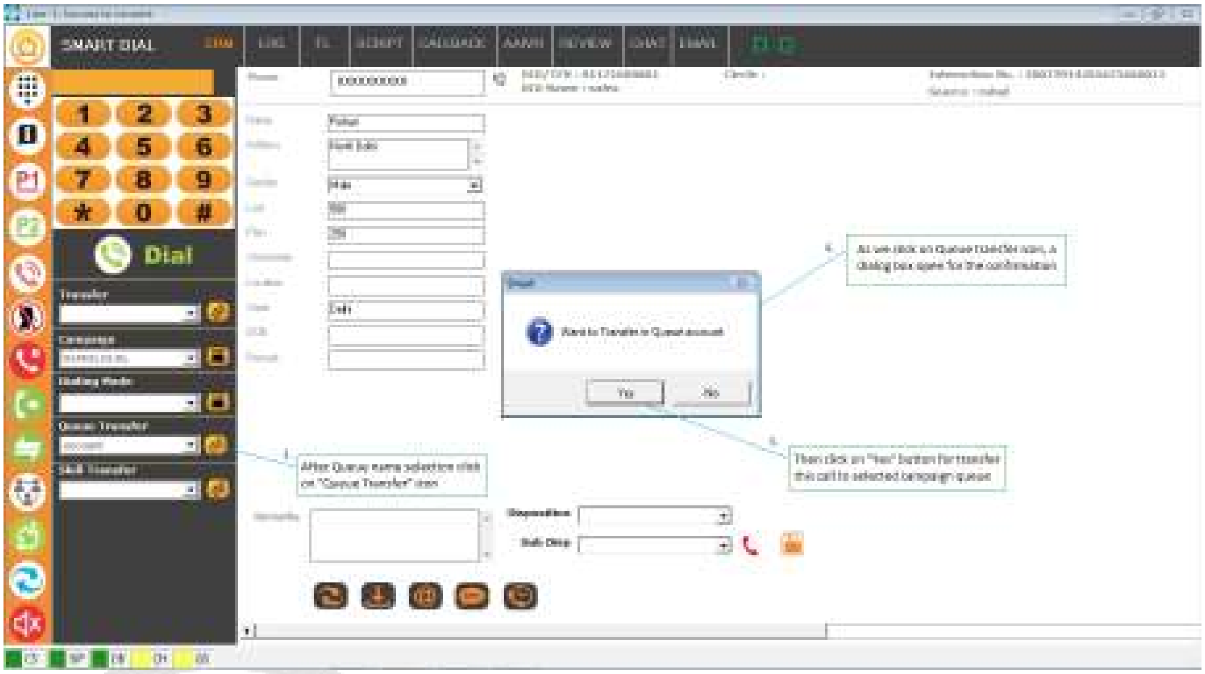


Step5: If it's required to call transfer to other campaign queue then select the campaign but don't click on save button as shown in below snapshot



Step6: Then select the queue transfer name as shown in above picture

Step7: After that click on "Queue Transfer" icon



Step8: As we click on Queue Transfer icon, a dialog box opens for the confirmation as “Want to Transfer in Queue XXXXX” with the option ‘Yes’ and ‘No’ button

Step9: Then click on “Yes” button for transfer this call to selected campaign queue

Step10: After clicking on “Yes” button, the call should be automatically disconnected from the Desktop Agent and transferred to the selected campaign queue

Step11: Then enter the details which are necessary in CRM fields

Step12: After that select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step13: At last click on “Save Disposition” button to save the disposition and complete the call

Step14: After dispose Desktop Agent ready for the next call

12. SKILL Transfer Function

Skill transfer is the mechanism, which enables the inbound and outbound calls, to be transferred from one skill to another skill.

To apply the skill transfer technique, it is acquired to

(i) Create a skill, going to skill master via client panel
(ii) Then create a skill based routing (SR) type campaign via client panel
(iii) After that map the skill to campaign and User

Skill transfer function check through the Desktop Agent

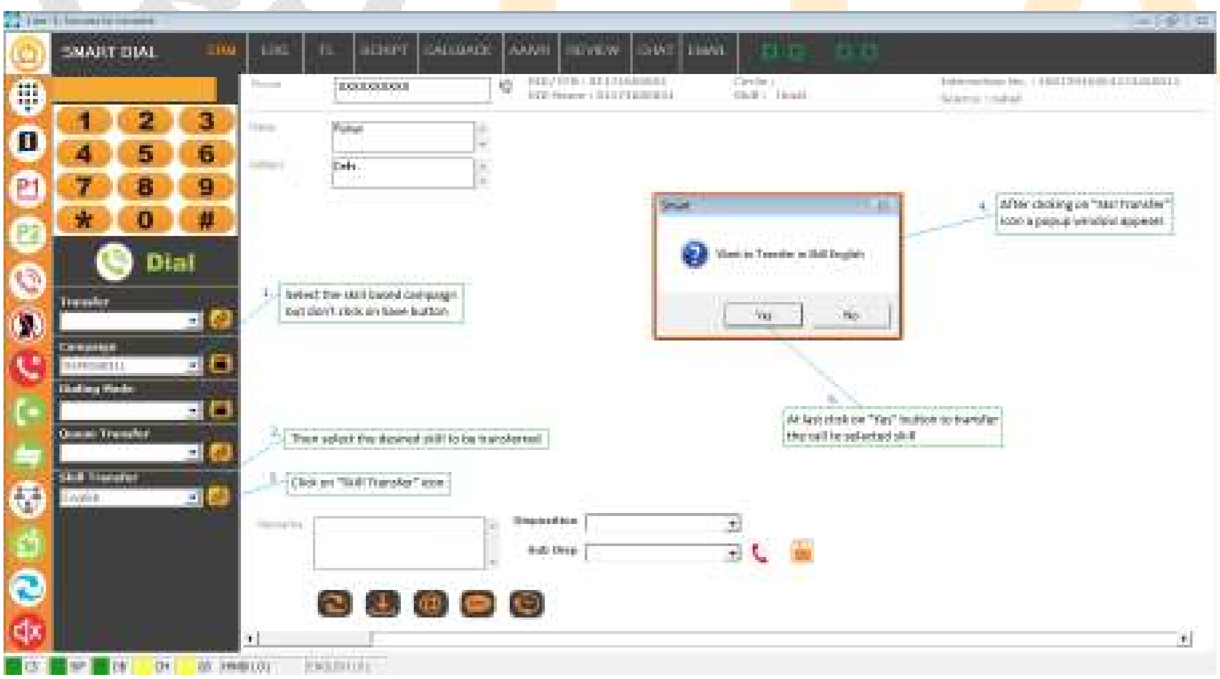
The objective of this test is to verify that skill transfer function works properly through the Desktop Agent.

Step1: After successfully logged into the Desktop Agent

Step2: Dial/Receive the call through the system

Step3: Concerned number is fetched in CRM panel if data is available

Step4: When user is "ON Call" and he/she wants to transfer the call in Skill based campaign



Step5: Then select the skill based campaign but don't click on save button

Step6: After that select the skill from "Skill Transfer" Combo box

Step7: Then click on "Skill transfer" icon as shown in above snapshot

Step8: After clicking on that message shows as "Want to transfer in Skill XXXXX"

Step9: If you click on "Yes" button, call transfer to the selected skill queue

Step10: After clicking on "Yes" button call should be automatically disconnected from Desktop Agent and call transferred to the selected campaign skill

Step11: Then enter the details which are necessary in CRM fields

Step12: Then select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step13: At last click on "Save Disposition" button to save the disposition and complete the call

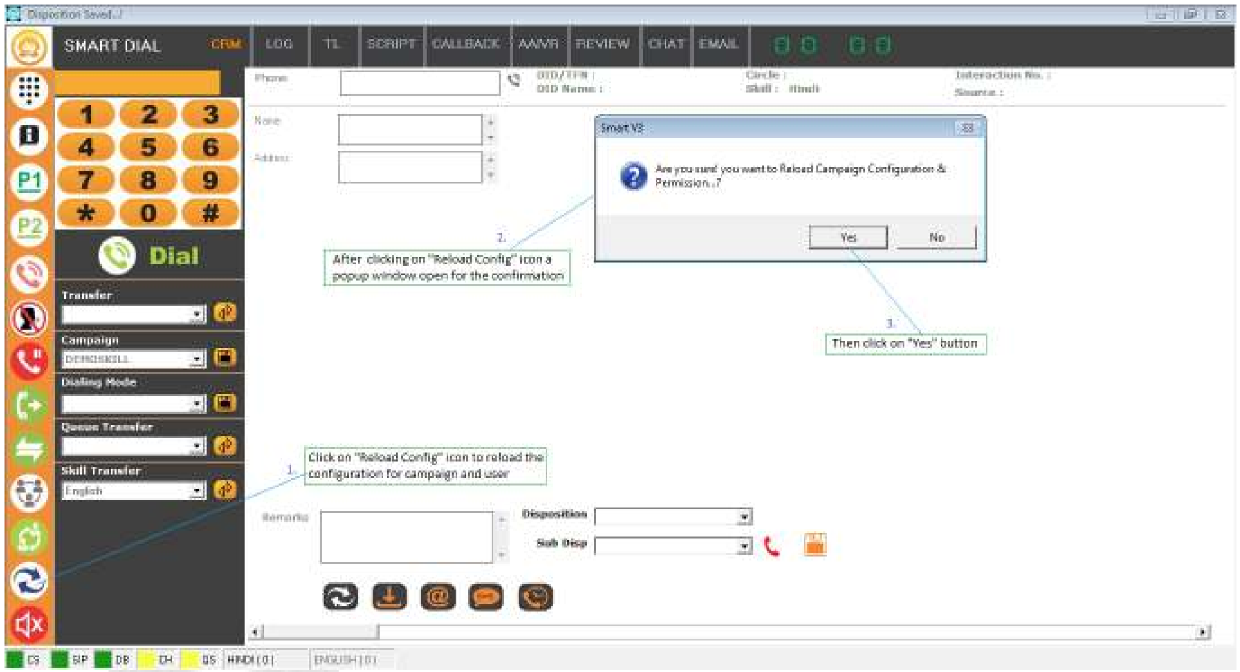
Step14: After disposition Desktop Agent is ready for the next call

13. Reload function for Desktop agent

The objective of this test is to verify that reload function works properly through the Desktop Agent.

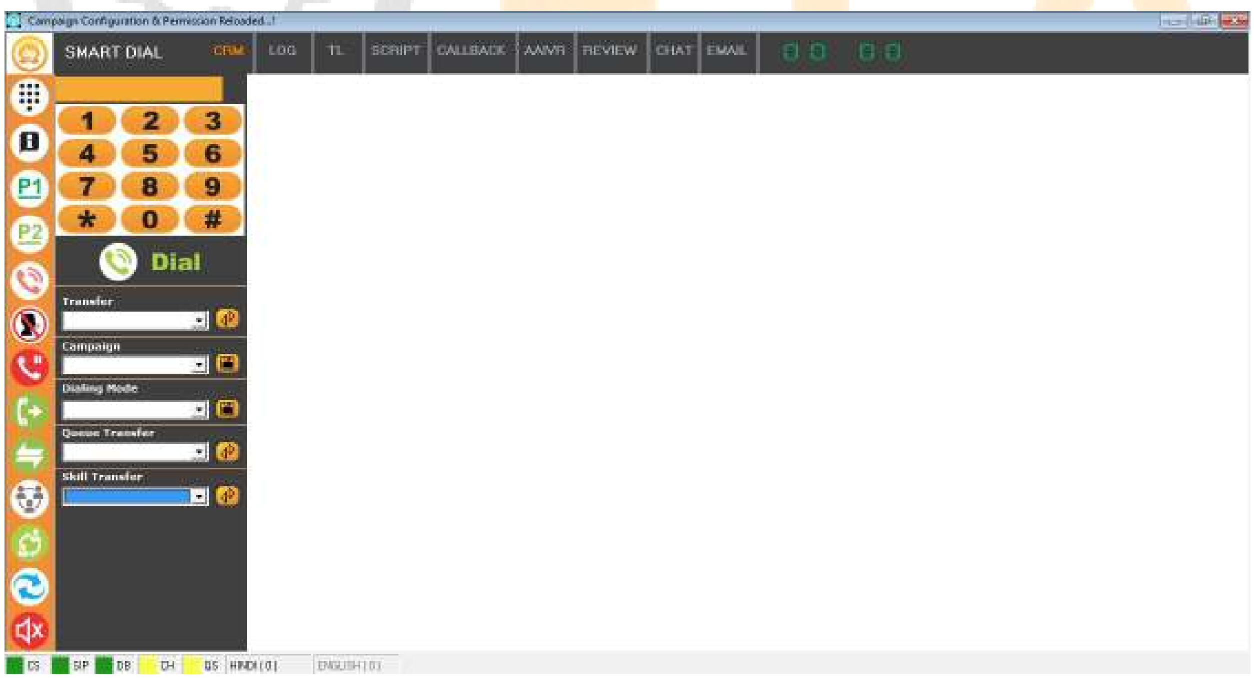
Step1: After successfully logged into the Desktop Agent

Step2: Click on "Reload Config" icon to reload the configuration for the campaign and user as follows



Step3: After clicking on “Reload Config” icon a popup window open with `Yes` and `No` button

Step4: As we click on “Yes” button then message shows on title bar as “Campaign Configuration & Permission Reloaded….!”



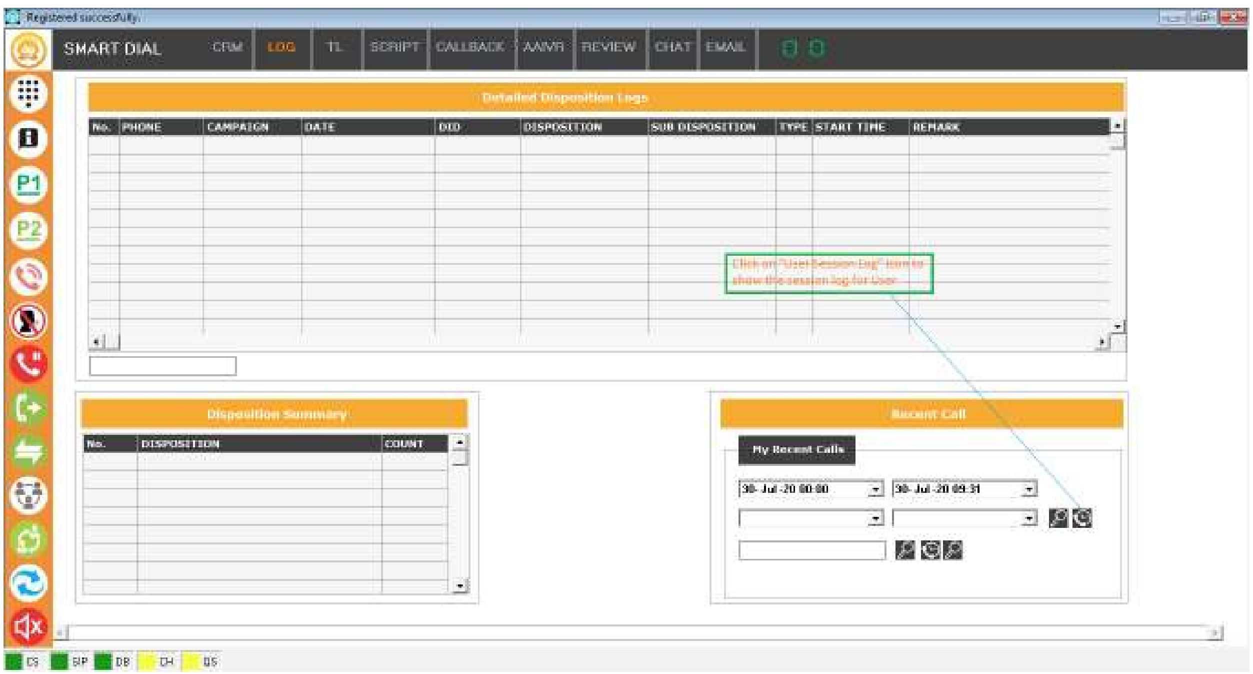
14. User Session Log

The objective of this test is to verify that user check his/her session log properly through the Desktop Agent.

Step1: First provide the user session URL in “usersession_url” field for the respective campaign in database

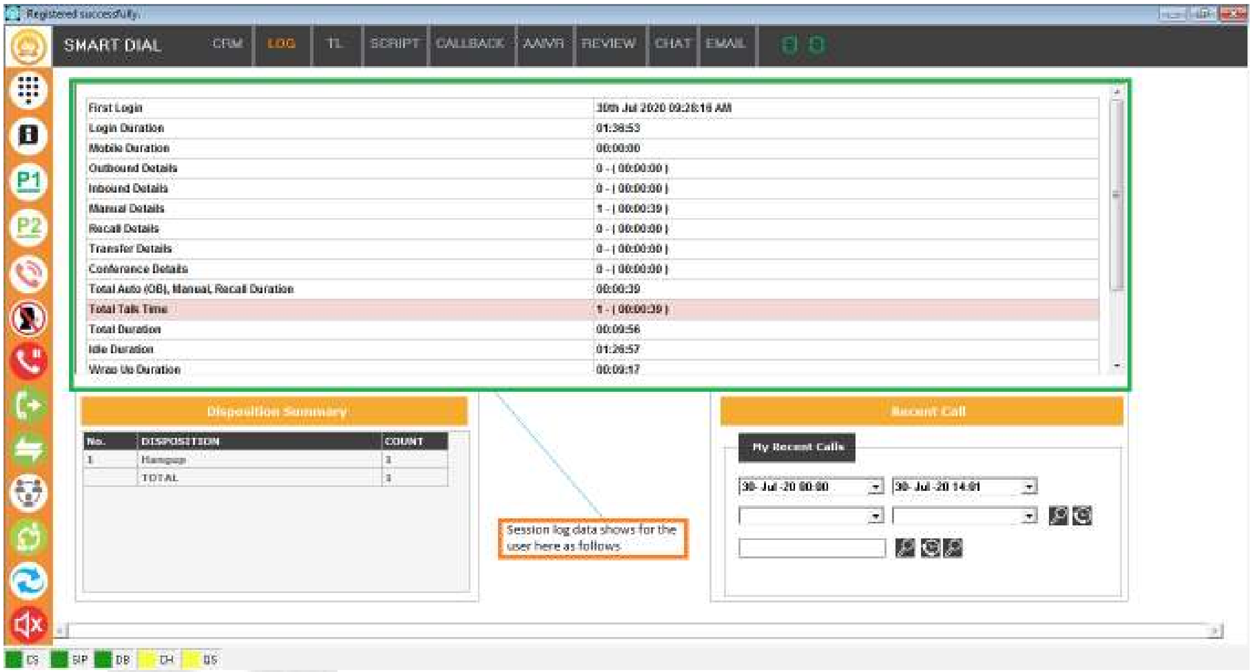
Step2: Then Logged into the Desktop Agent

Step3: After that click on Log Tab to show the detailed data for user



Step4: Then click on “User Session Log” icon which is available in the “Recent Call” section

Step5: If URL set then “User Session Log” data shows as follows



Setp6: If URL not set then message shows as "User Session URL Not Found...!"

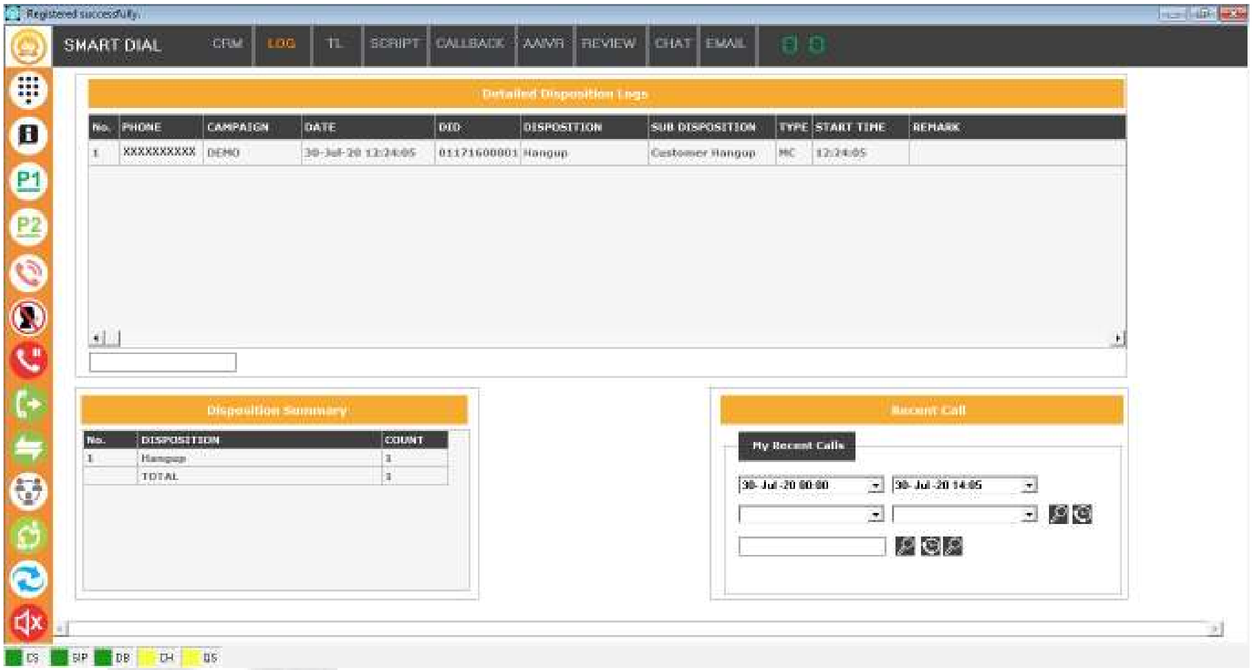
15. Log Check From Desktop Agent

The objective of this test is to verify that user check his/her dialed log properly through the Desktop Agent.

Step1: Login user through the Desktop Agent

Step2: If user wants to check his/her dialed data then click on Log Tab

Step3: After clicking on LOG Tab, data shows for the current date with the CRM fields otherwise alert message shows as "No Record Found"

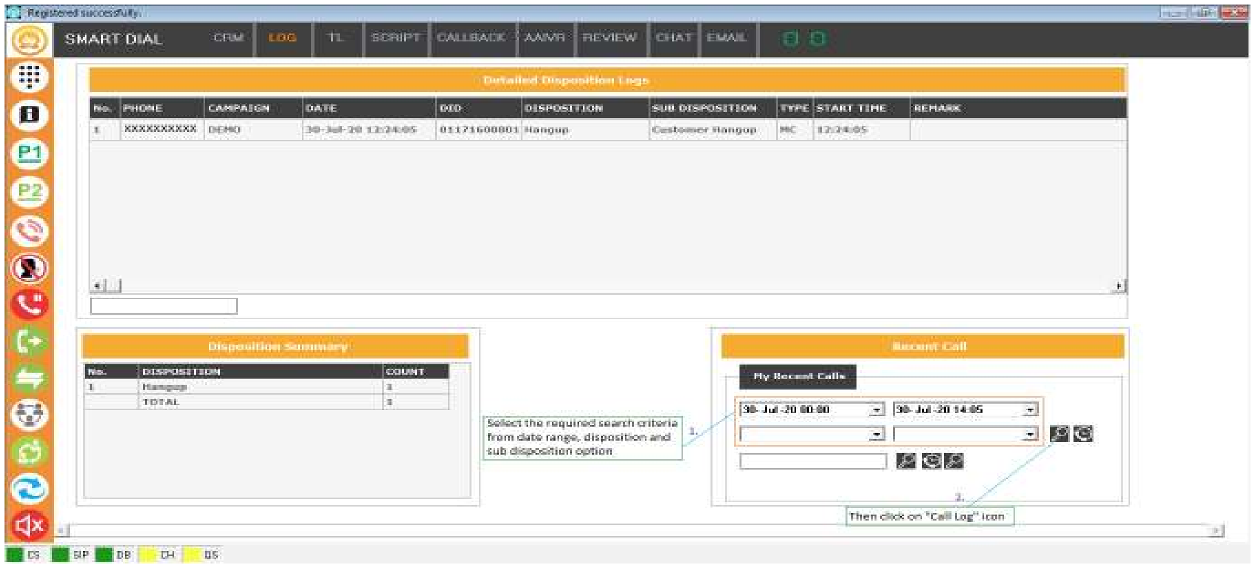


Call Log Search

Step4: Then select the required search criteria from date range, disposition and sub disposition from “Recent Call” section

Step5: After that click on “Call Log” icon as shown in snapshot

Step6: As we click on “Call Log” icon data shows according to that in “Detailed Disposition Logs” and “Disposition Summary” section



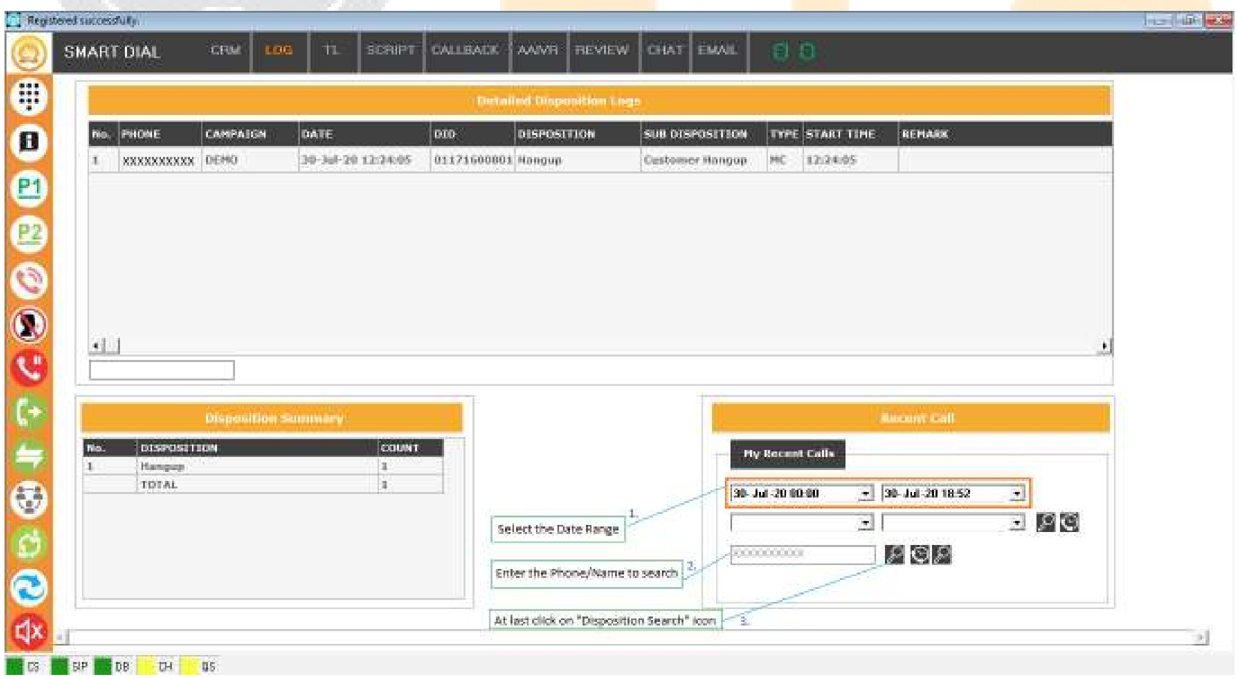
Step7: There will be a filter text-box available in "Detailed Disposition Logs" section.

Step8: Enter the value in Filter text box as required

Step9: As we enter the value in Filter text box, it gives the output

Disposition Search

Step4: Then select the date range and enter the phone or name in textbox to search the data



Step5: As we click on “Disposition Search” icon, data shows according to that in “Detailed Disposition Logs” and “Disposition Summary” section

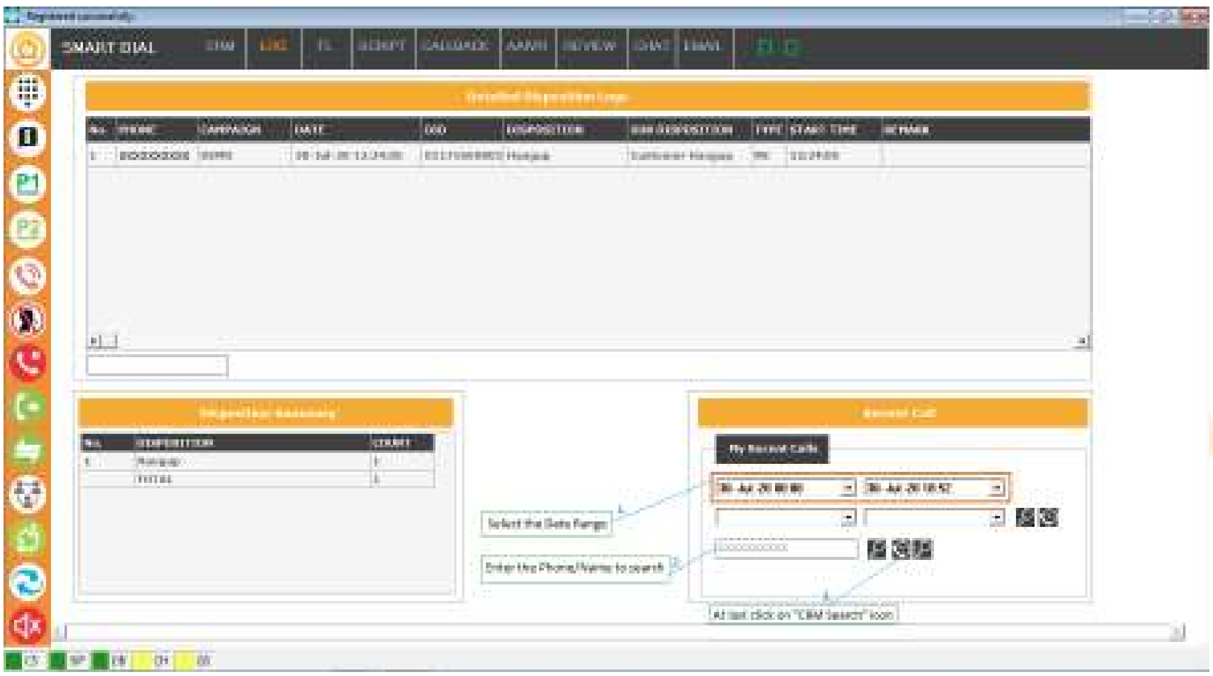
Step6: There will be a filter text-box available in “Detailed Disposition Logs” section.

Step7: Enter the value in Filter text box as required

Step8: As we enter the value in Filter text box then data shows according to the searched value

CRM Search

Step4: Then select the date range and enter the phone or name in textbox to search the data



Step5: As we click on `CRM Search` icon, data shows according to that in “Detailed Disposition Logs” and “Disposition Summary” section

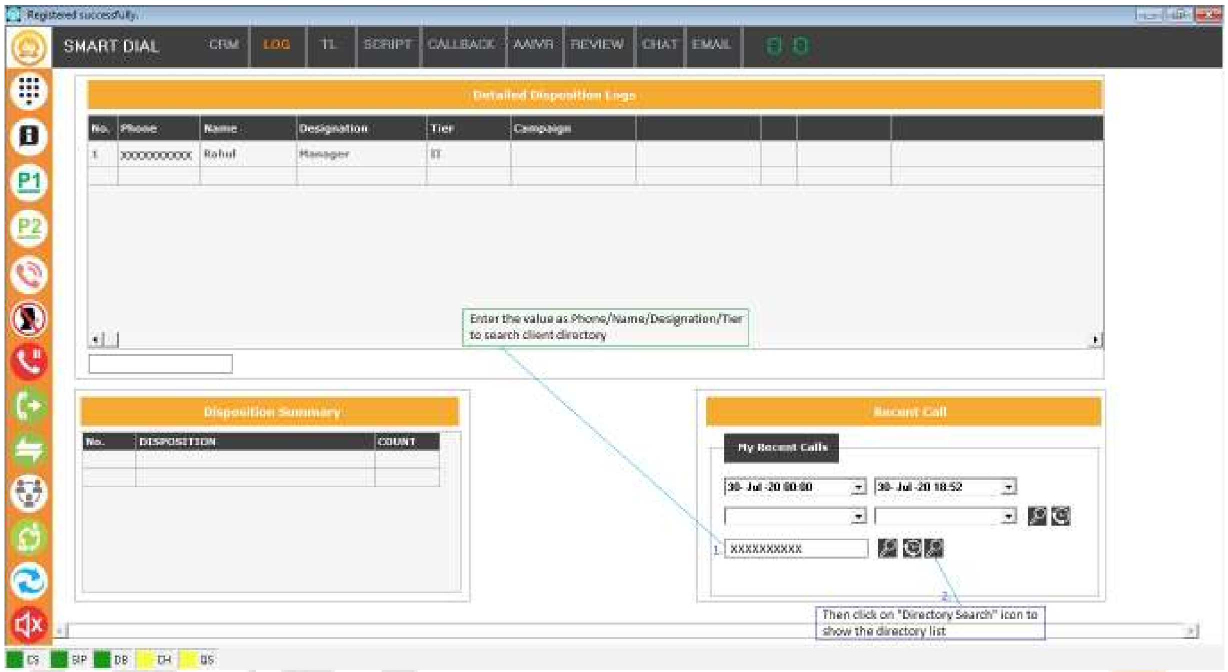
Step6: There will be a filter text-box available in “Detailed Disposition Logs” section.

Step7: Enter the value in Filter text box as required

Step8: As we enter the value in Filter text box then data shows according to the searched value

Directory Search

Step4: Then enter the value as Phone/Name/Designation/Tier in text-box



Step5: As we click on “Directory Search” icon data shows in `Detailed Disposition Logs`.

Step6: There will be a Filter text box available in the bottom.

Step7: Then enter the value in Filter text box as required

Step8: As entering the value in Filter text box, it gives the output in that data only which already searched by the user

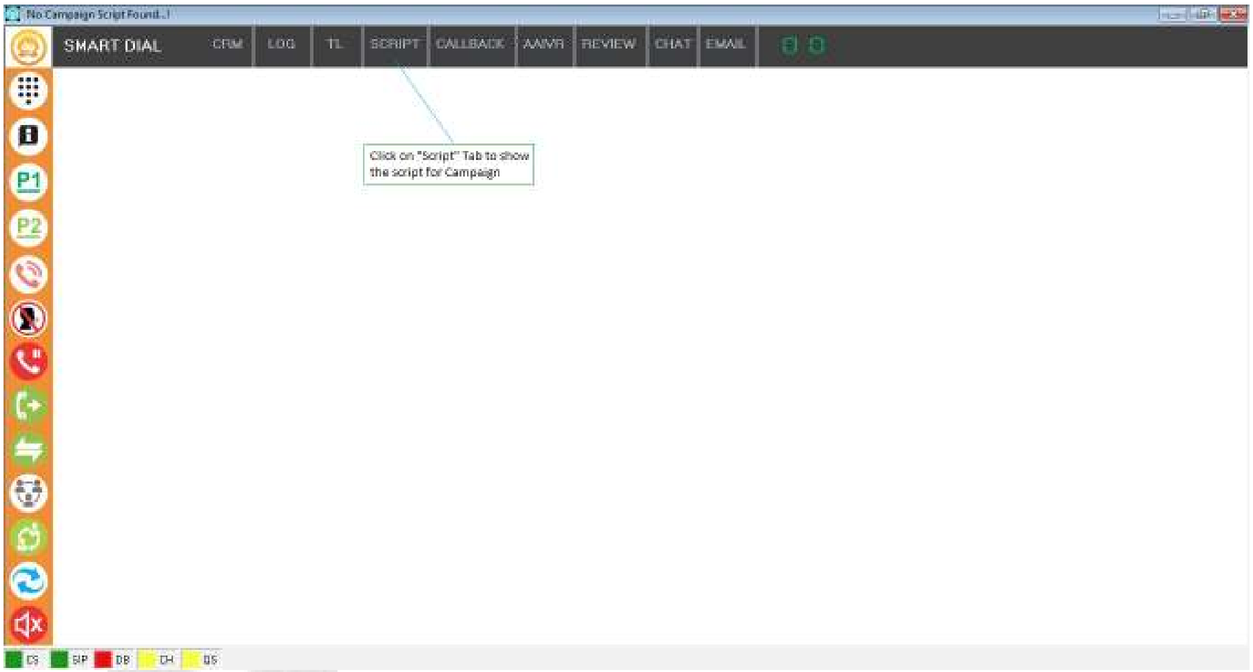
16. Script Tab

The objective of this test is to verify that Script page open successfully through the Desktop Agent.

Step1: Add script for the campaign from “Campaign” sub-sub menu through the client panel.

Step2: Then Login user through the Desktop Agent

Step3: When user click on “Script” Tab then script which set through the client admin panel views to user otherwise message shows on title bar as “No Campaign Script Found...”.



17. Set Callback through Desktop agent

The objective of this test is to verify that “callback set” function works properly through the Desktop Agent.

Step1: After successfully login to the Desktop Agent

Step2: Dial/Receive the call through the system

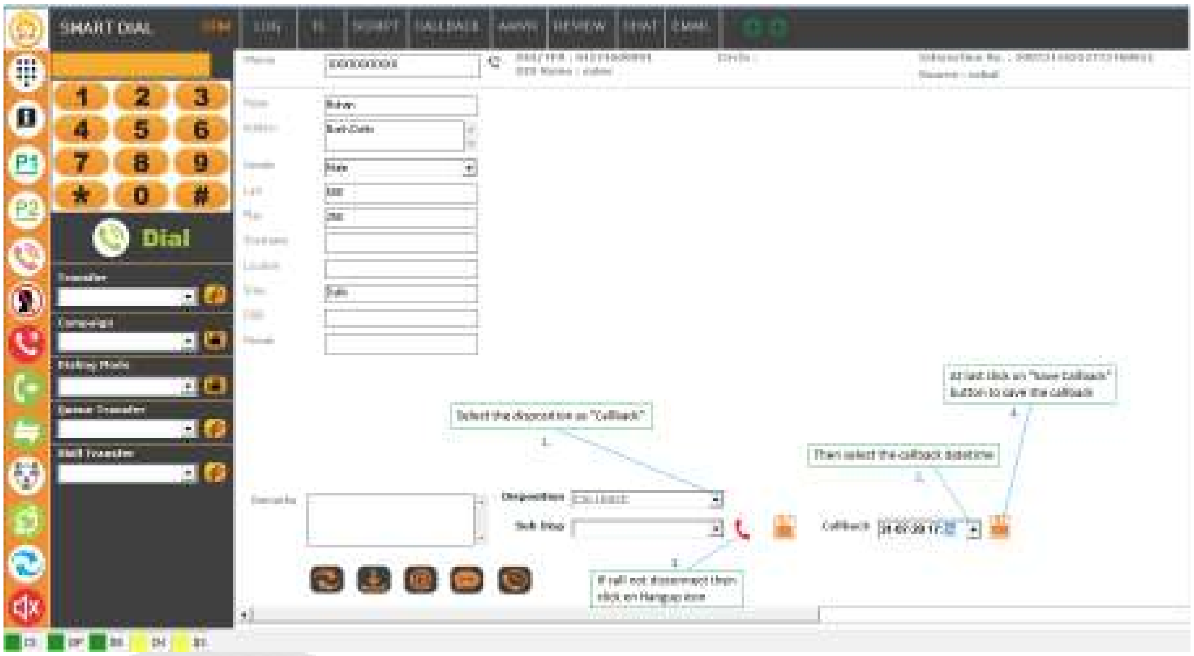
Step3: Concerned number fetched in CRM panel if data available

Step4: If customer says that call him/her after sometimes

Step5: Then enter the details which necessary in CRM fields

Step6: Then select the disposition as “Callback” from disposition drop down menu

Step7: Then select the Callback date and time



Step8: If customer call not disconnects then click on “Hangup” icon

Step9: At last click on “Save Callback” button to save the Callback and complete the call

18. Callback Automatic dial and transfer to agent

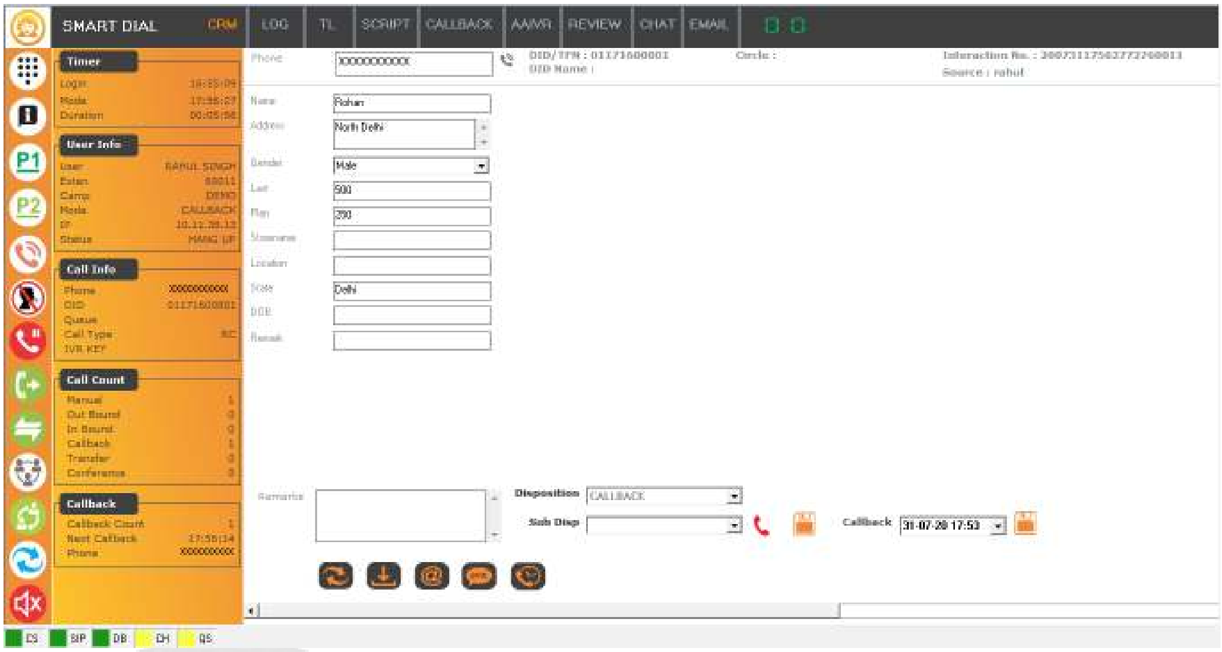
The objective of this test is to verify that Callback automatic dial and transfer to the agent through Desktop Agent.

Step1: After successfully login to the Desktop Agent

Step2: When recall time occurs and user free

Step3: Then dialing mode automatically changed as Callback

Step4: After the mode change, callback number dialed and data fetched in CRM panel



Step5: When call complete and call not disconnect by the concerned person then click on “Hangup” icon from CRM Page for hangup the call

Step6: After that enter the details which necessary in CRM fields

Step7: Then select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step8: At last click on “Save Disposition” button to save the disposition and complete the call

19. Callback manually dial by the agent

The objective of this test is to verify that user successfully dial the callback manually through the Desktop Agent.

Step1: After successfully logged into the Desktop Agent

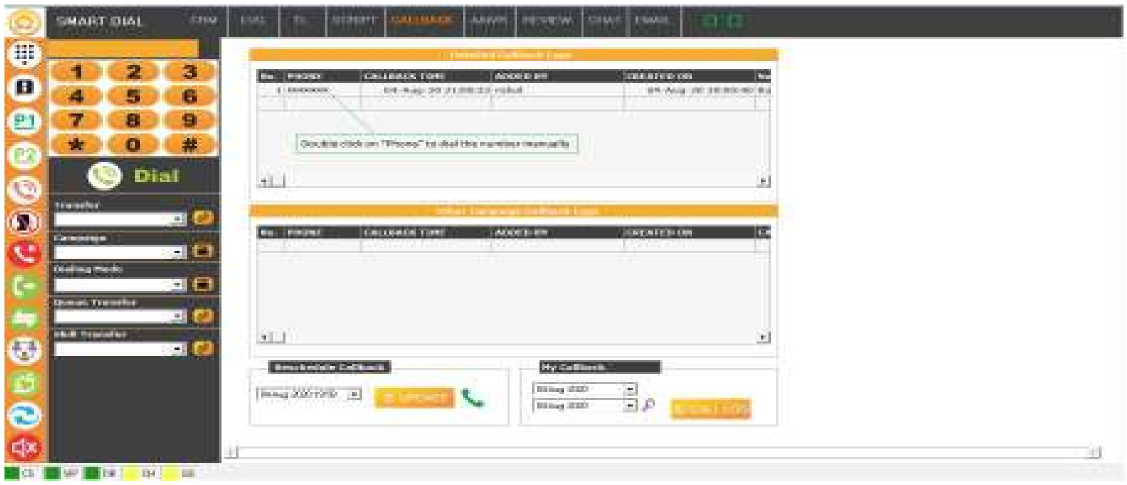
Step2: Then click on Callback Tab

Step3: After clicking on callback tab, data load for the current date and it shows to user in “Detailed Callback Logs” Section or search the data according to date range

Step4: For manual dialing of callback, change the mode to callback then

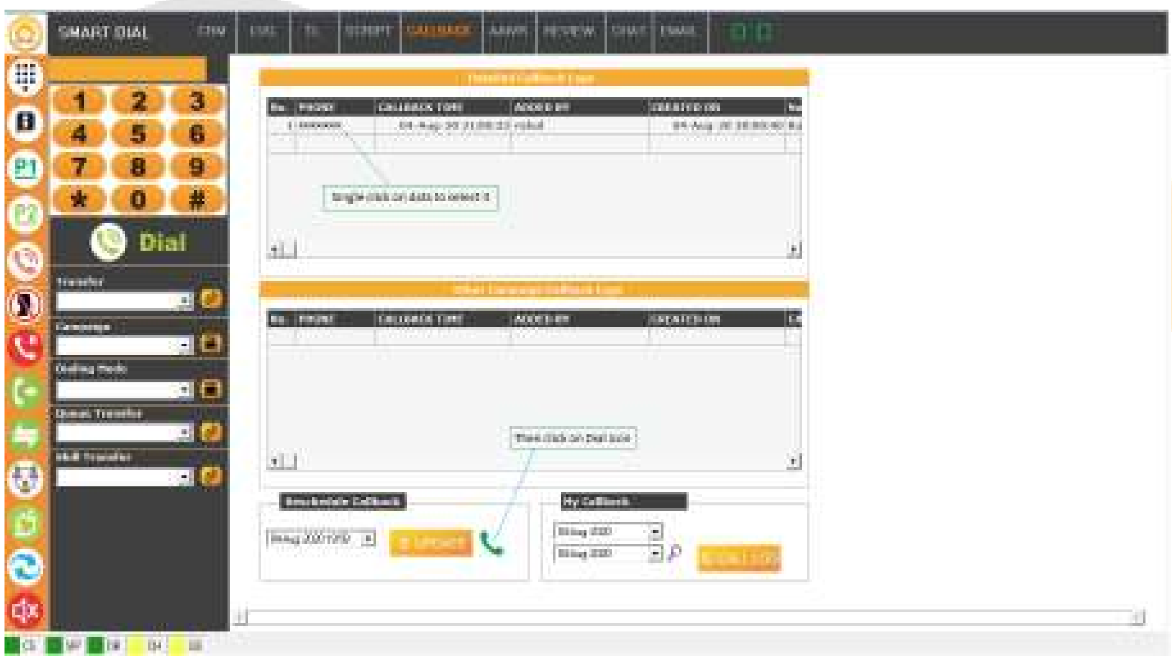
Case1

Step5: Double click on Phone number for manual dialing

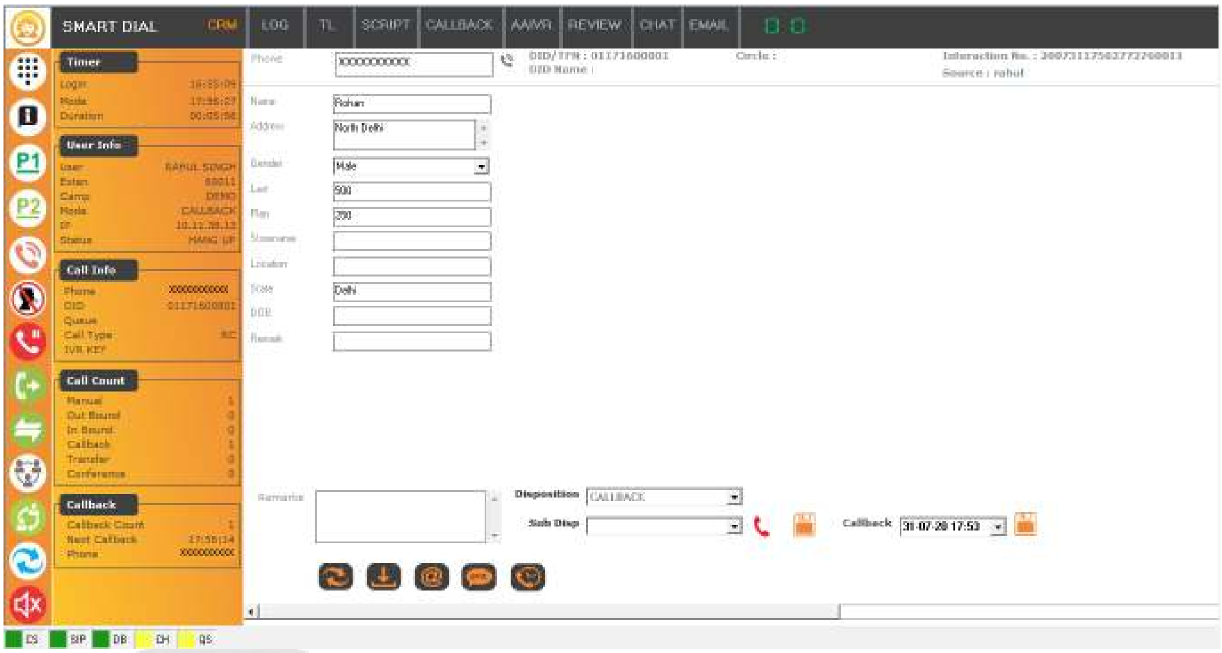


Case2

Step5: Single click on data to select it then click on dial icon for manually dial



Step6: Number dialed and data fetched in CRM panel



Step7: When call complete and call not disconnect by the concerned person then click on "Hangup" icon from CRM Page for hangup the call

Step8: After that enter the details which necessary in CRM fields

Step9: Then select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step10: At last click on "Save Disposition" button to save the disposition and complete the call

20. Callback Reschedule by the agent

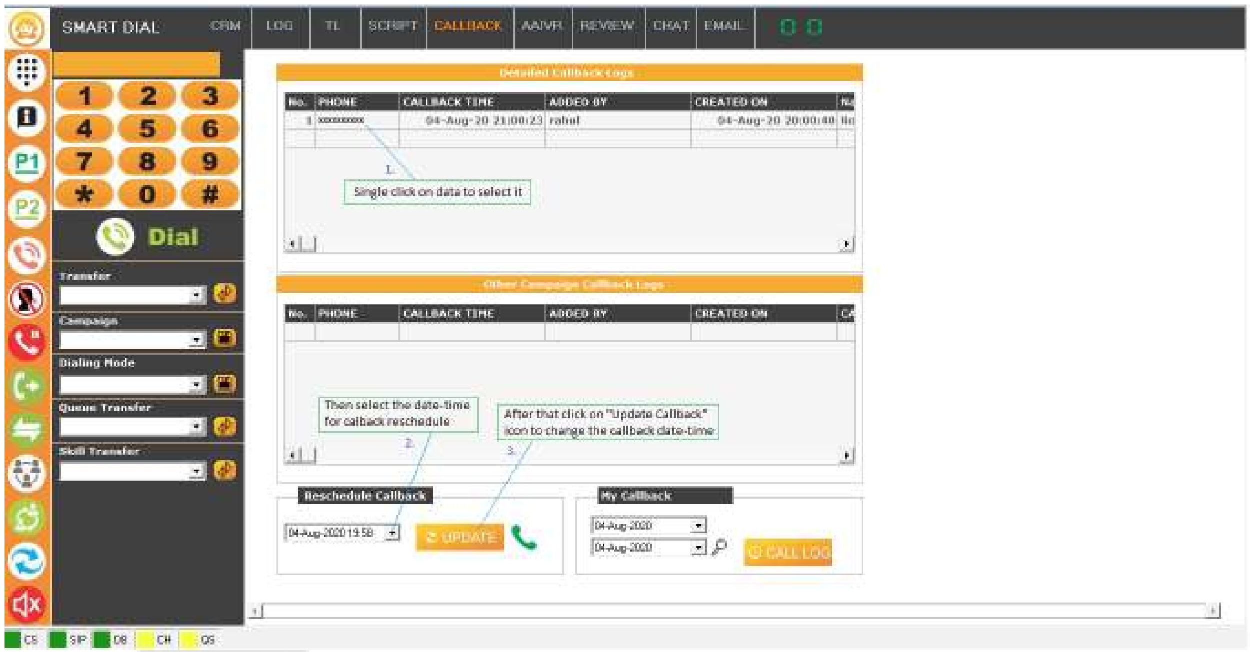
The objective of this test is to verify that callback reschedule successfully through the Desktop Agent.

Step1: After successfully logged into the Desktop Agent

Step2: Then click on Callback Tab

Step3: After clicking on callback tab, data load for the current date and it shows to user in "Detailed Callback Logs" Section or search the data according to date range

Step4: First single click on data from "Detailed Callback Logs" section



Step5: Then Select the date and time from “Reschedule Callback” section

Step6: At last click on “Update Callback” icon to reschedule the callback

21. Callback CallLog check through the Desktop agent

The objective of this test is to verify that callback “Call Log” checks successfully through the Desktop Agent.

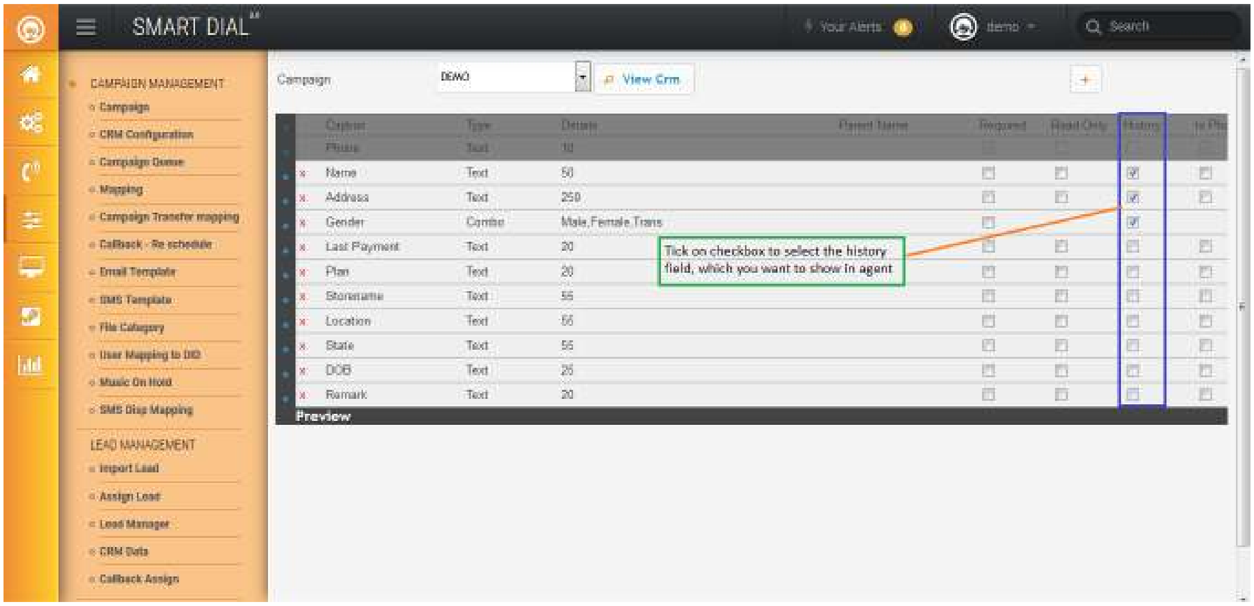
Step1: Login admin user on smart panel

Step2: Then click on “Operational Configuration” Menu => After that click on “Campaign Management” Sub Menu => Then Click on “CRM Configuration” Sub-sub menu

Step3: When “CRM Configuration” Page shows, then select the campaign and click on “View CRM” button

Step4: After clicking on “View CRM” button, CRM field details shows on the page

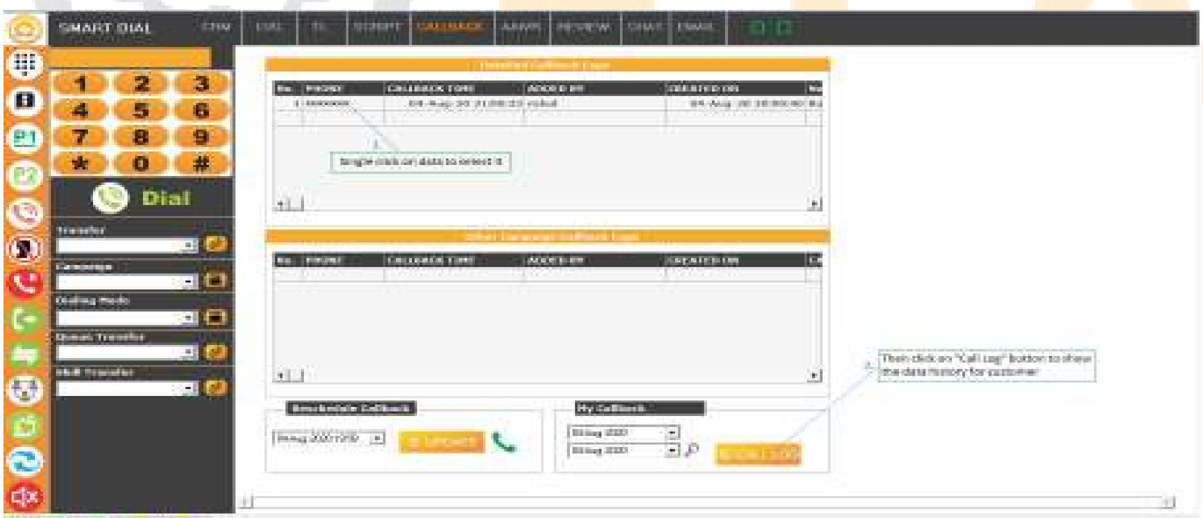
Step5: Then click on "History" checkbox to show the respective field on Desktop Agent



Step6: After that login user through the Desktop Agent and Click on Callback Tab

Step7: As clicking on callback tab, data load for the current date and it shows to user in “Detailed Callback Logs” Section or search the data according to date range

Step8: First single click on data from “Detailed Callback Logs” section



Step9: Then click on “Call Log” button to show the data history for customer

Step10: After clicking on “Call Log” button, call log history shows for the customer in ‘Detailed Callback Logs’ section

22. Review Function

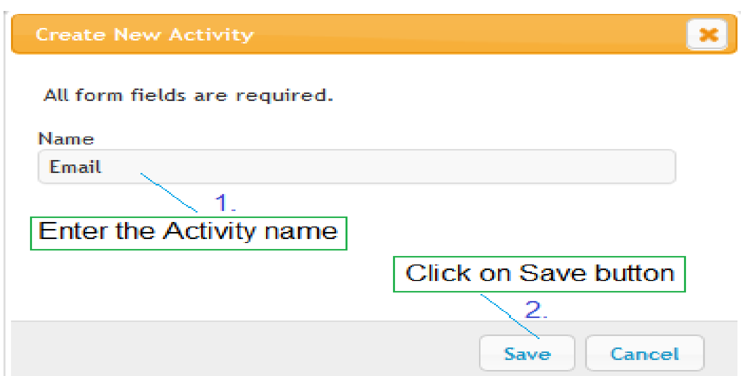
The objective of this test is to verify that review function working properly through the Desktop Agent.

Add New Activity from Client Panel:

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

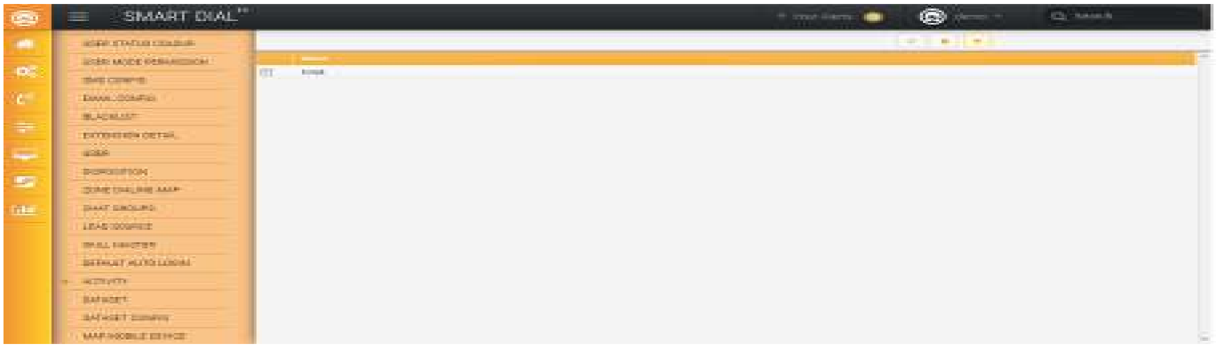
Step2: When Activity page appears then click on + icon to open “Create New Activity” dialog box

Step3: Create New Activity dialog box shows as follows:



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

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



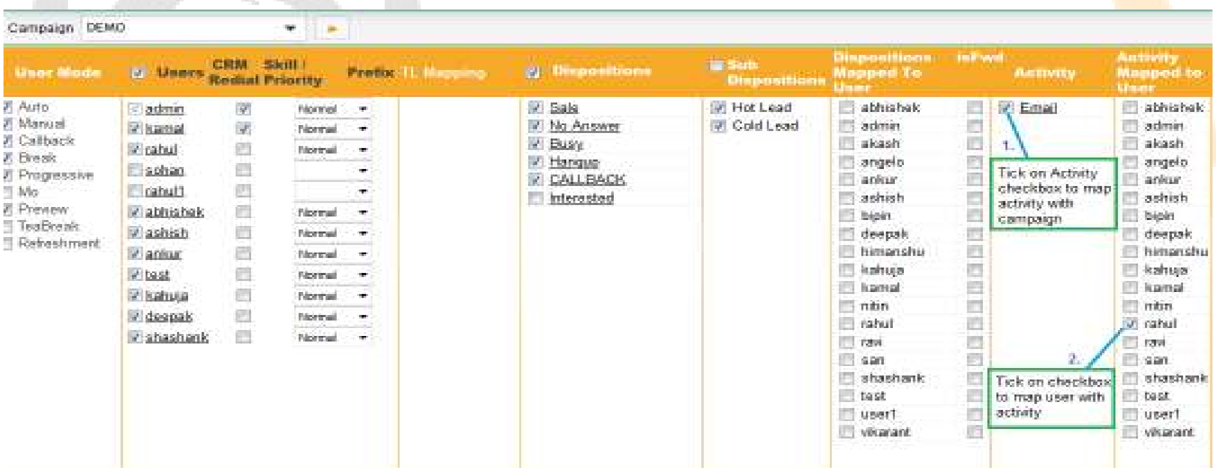
Map Activity with campaign & User

Step1: First click on Operational Configuration Menu => Then click on Campaign Management Sub Menu => After that click on Mapping Sub-sub Menu

Step2: Then select the campaign => Click on view to show the mapping data

Step3: After that tick on activity checkbox to map the activity with campaign

Step4: At last tick on “Activity mapped to User” checkbox to map user with selected activity as shown in picture



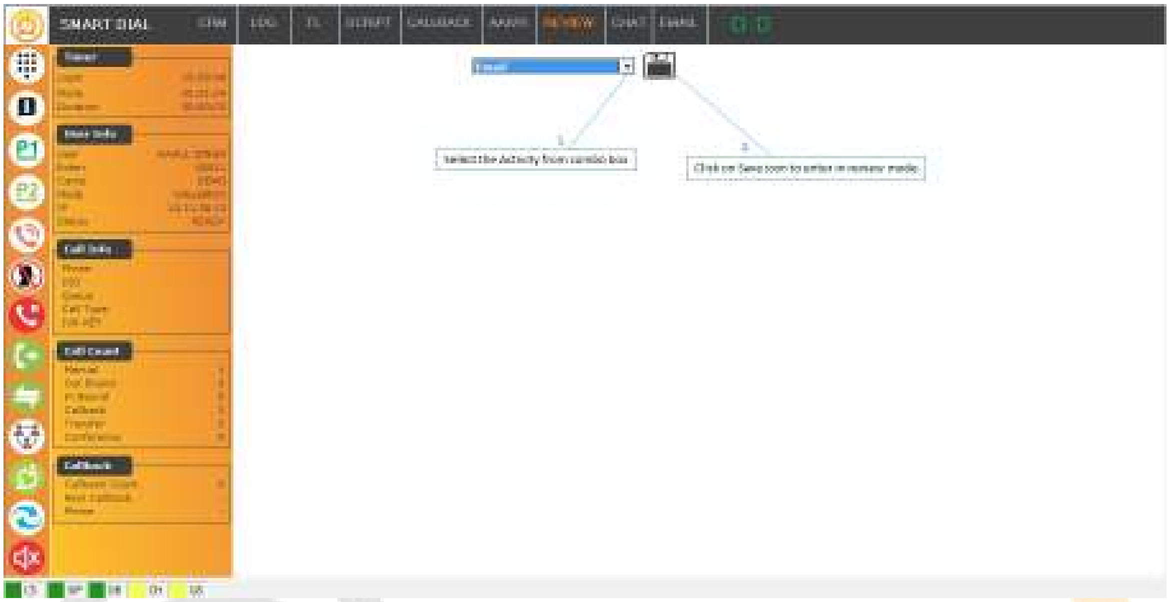
Activity selection in Agent application

Step1: Login user through the Desktop Agent

Step2: Then click on Review Tab.

(i) If user not map with the activity in that campaign then message shows as "Permission Denied…!"

(ii) If user map with the campaign then Review Tab open. Below option shows in that page

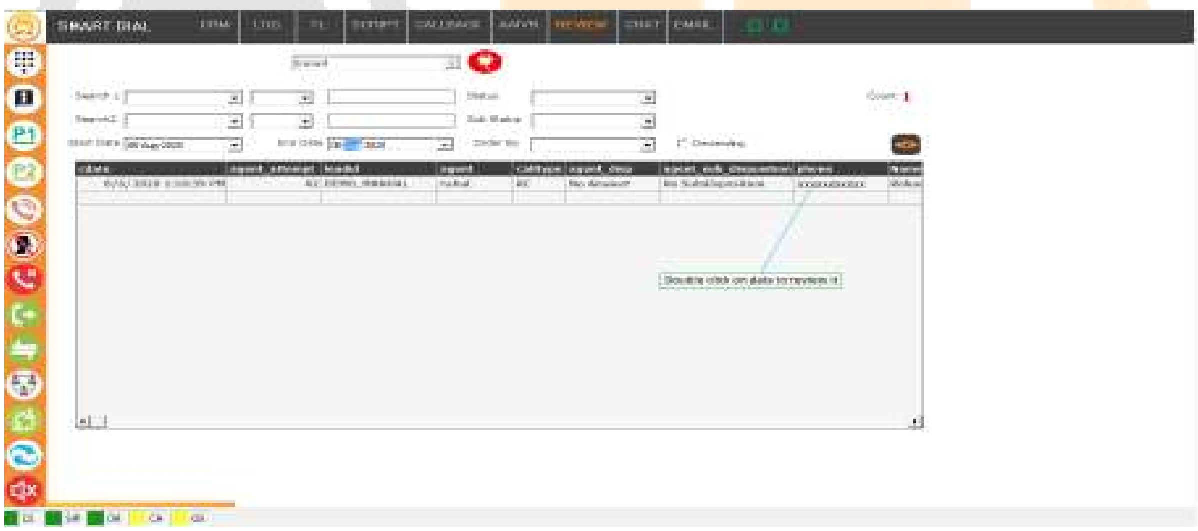


Step3: Select the Activity and click on “Save” icon to enter in review mode.

When you select the activity then user status change from `Ready` to that `Activity` in Desktop Agent and User status (Live panel)

Step4: After activity selection in Desktop Agent, search option view to user for data searching.

Step5: When data shows to user, then user click on any data for review it.

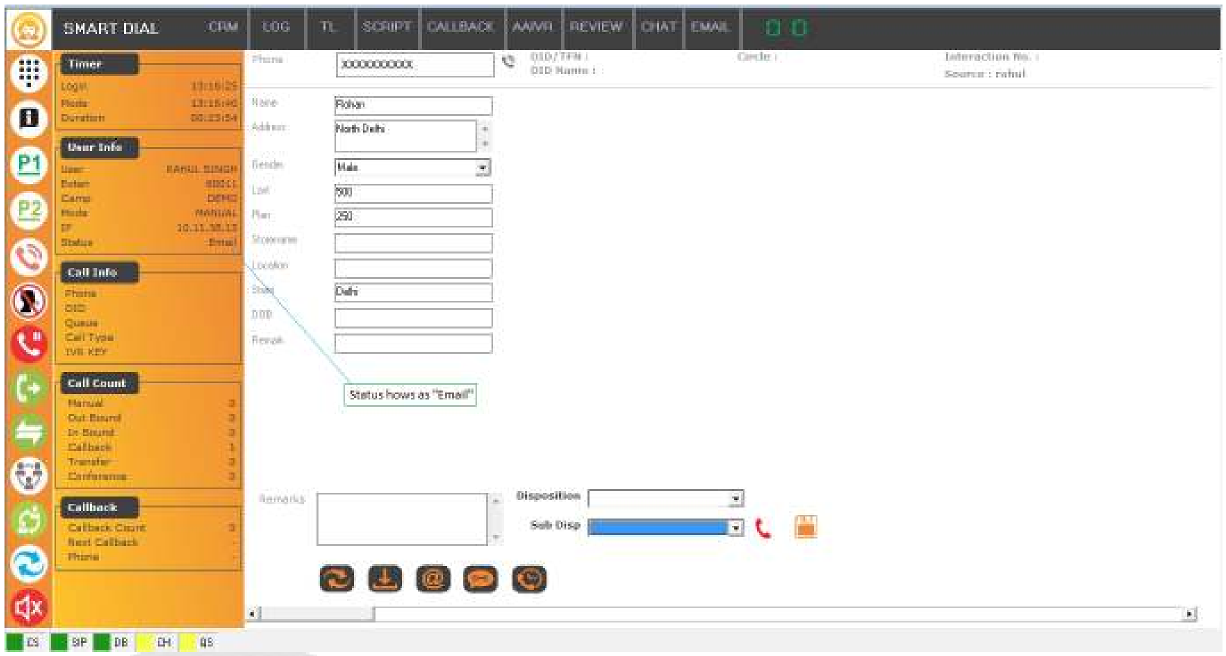


Step6: After double clicking on any data then below things will happen

(i) Data shows on agent crm page for review data

(ii) Number shows on Cust. Phone field in User status Sub menu

(iii) In this case number not dial, but agent able to update the crm, dispose the call and set the callback.



Step7: If user in any activity then below things happens

(i) User not able to receive call from server or dial any number from agent application

(ii) Not able to change mode/campaign

(iii) Not able to “Reload” the Configuration for user.

Step8: After that enter the details which necessary in CRM fields

Step9: Then select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step10: At last click on “Save Disposition” button to save the disposition and complete the call

23. Chat Function

The objective of this test is to verify that chat function working properly through the Desktop Agent.

Chat functionality is 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.

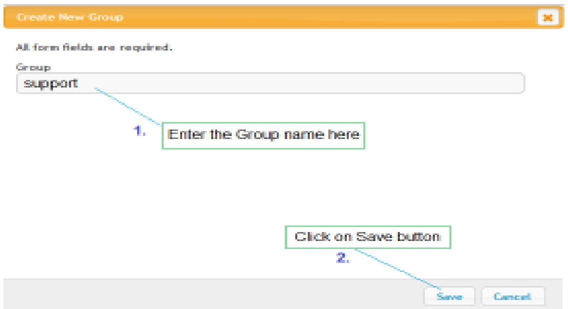
(vi) One to One chat and Group Chat available

1. Create Chat Group through client panel

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

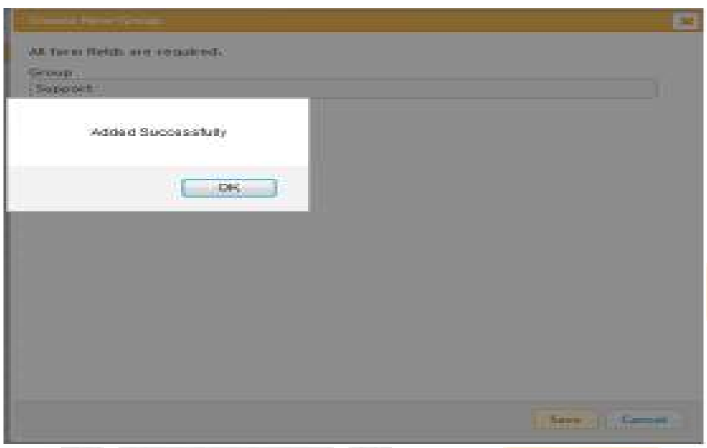
Step2: Chat Group page appears as follows:

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



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

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



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

2. Group (Chat) mapped to User through client panel

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

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

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

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

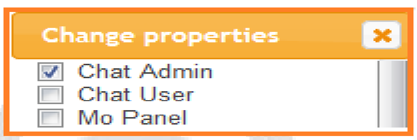
Chat function checked through Desktop Agent as follows:

Step1: Login user through the Desktop Agent

Step2: Then click on “CHAT” Tab.

(i) If users have not the permission for “Chat Admin” from ‘User’ sub menu (Client Panel) then message shows as "Access Deny…!"

(ii) If user had the permission for “Chat Admin” from ‘User’ sub menu (Client Panel) then CHAT Tab open.



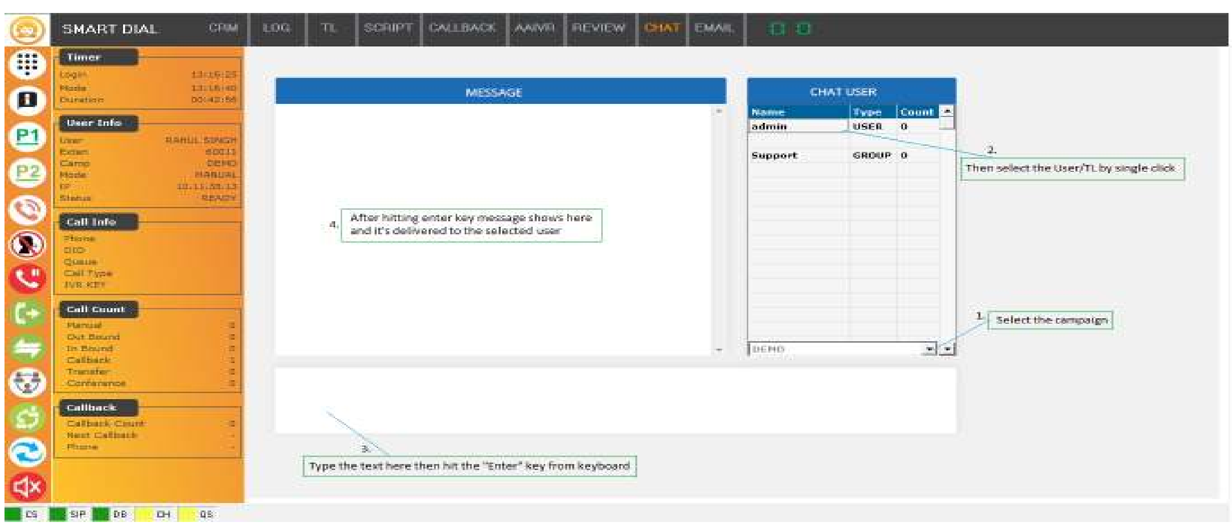
One to One Chat

Step3: First select the Campaign then select the user (or TL) by single Click

Step4: After that type the text to send message

Step5: Then use the “Enter” key from Keyboard to send the message

Step6: After using the enter key message delivered to selected user



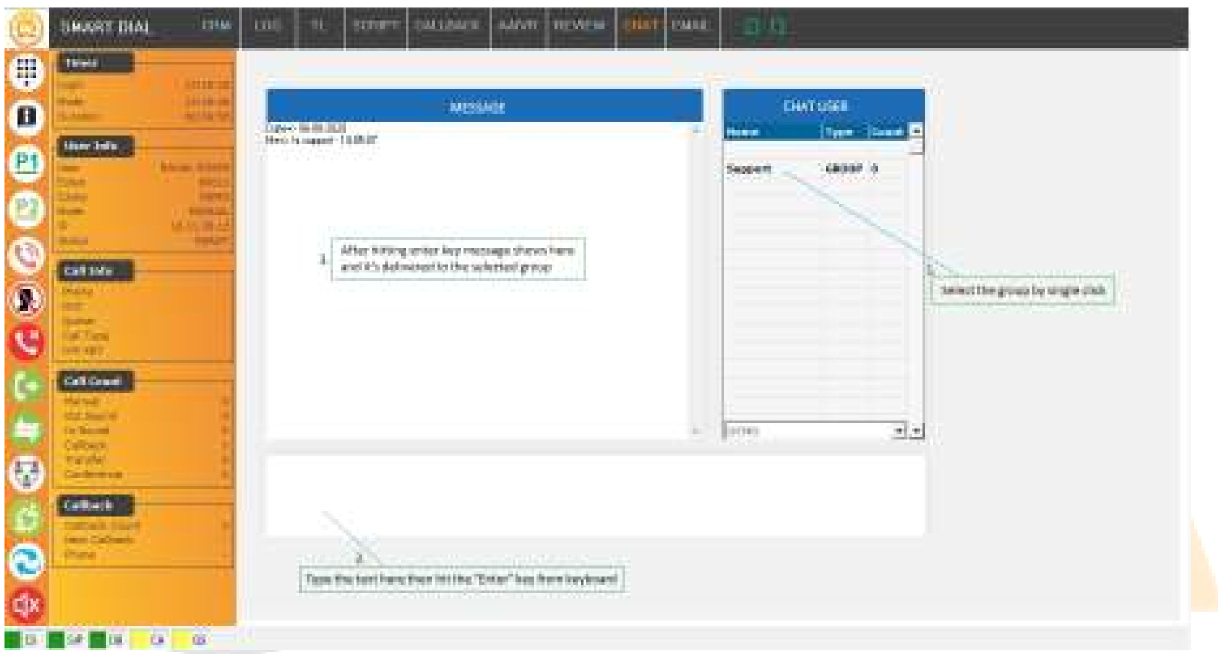
Group Chat

Step3: First select the Group by single click

Step4: After that type the text to send message

Step5: Then use the “Enter” key from Keyboard to send the message

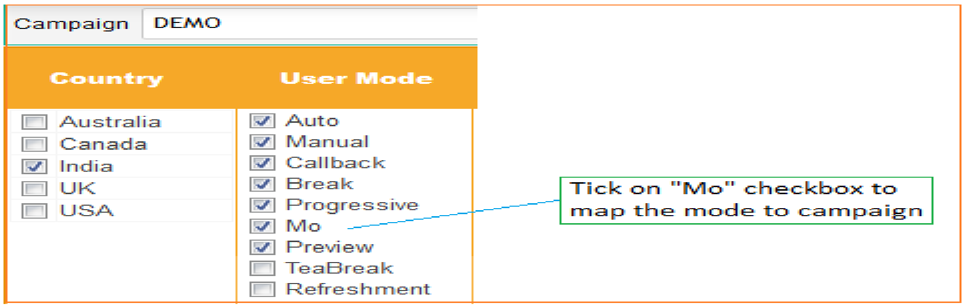
Step6: After using the enter key message delivered to selected group



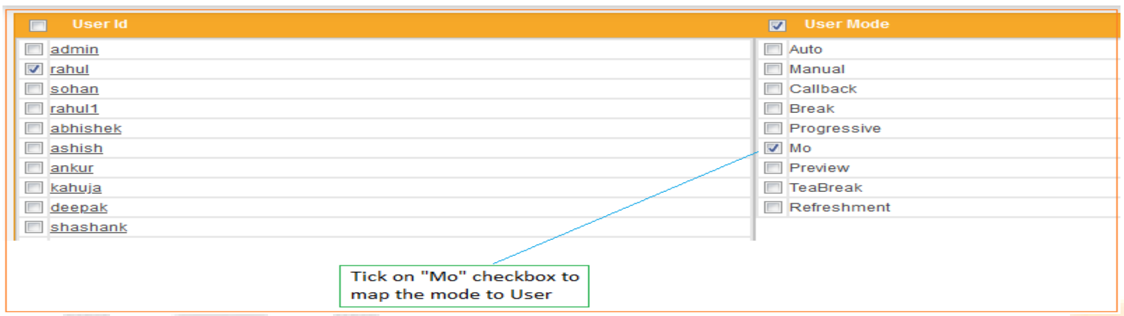
24. MO (Monitoring) Tab

Below permission required for the TL regarding Monitoring from Agent Application.

(i) Mo Dialing mode from “Mapping” Sub-sub menu or through the “User Mode Permission” sub menu



or



(ii) Mo Panel, Barge, Call Coach, Call Conf and Call Info permission from “User” sub menu (System Configuration Menu)

Monitoring Functionality check through Desktop Agent

The objective of this test is to verify that Monitoring functionality works properly through the Desktop Agent.

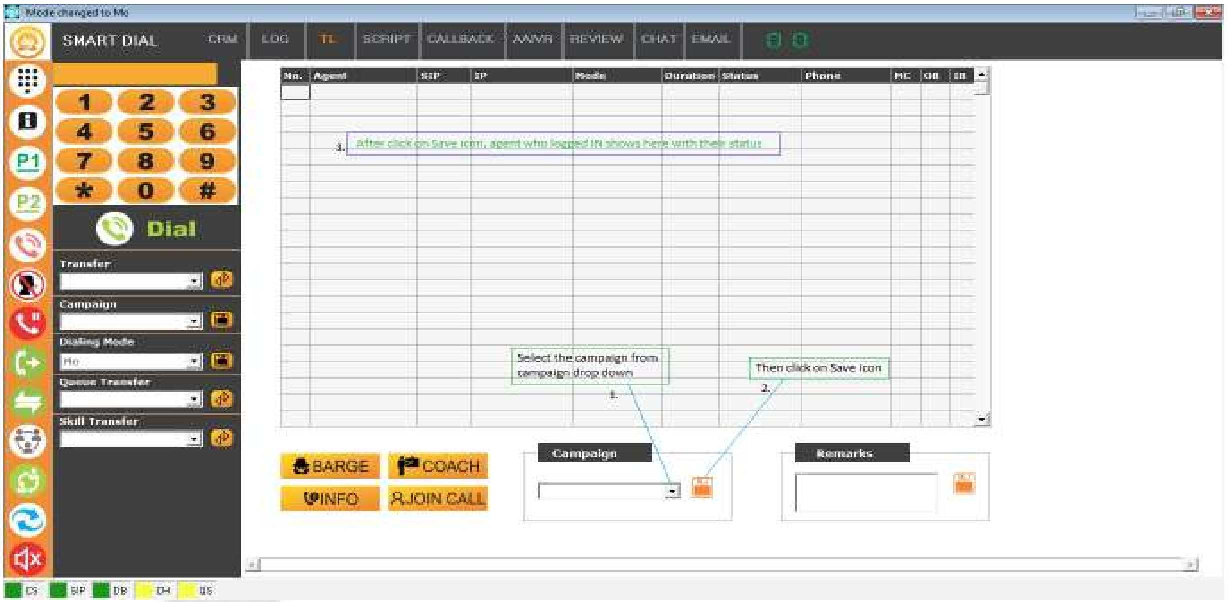
Step1: Login in Desktop Agent with the dialing mode as Mo

Step2: Click on “TL” Tab to open the Monitoring screen

Step3: After clicked on TL tab, it should navigate to the Monitoring screen

Step4: Select the campaign from Campaign drop down

Step5: Then click on icon to save the campaign

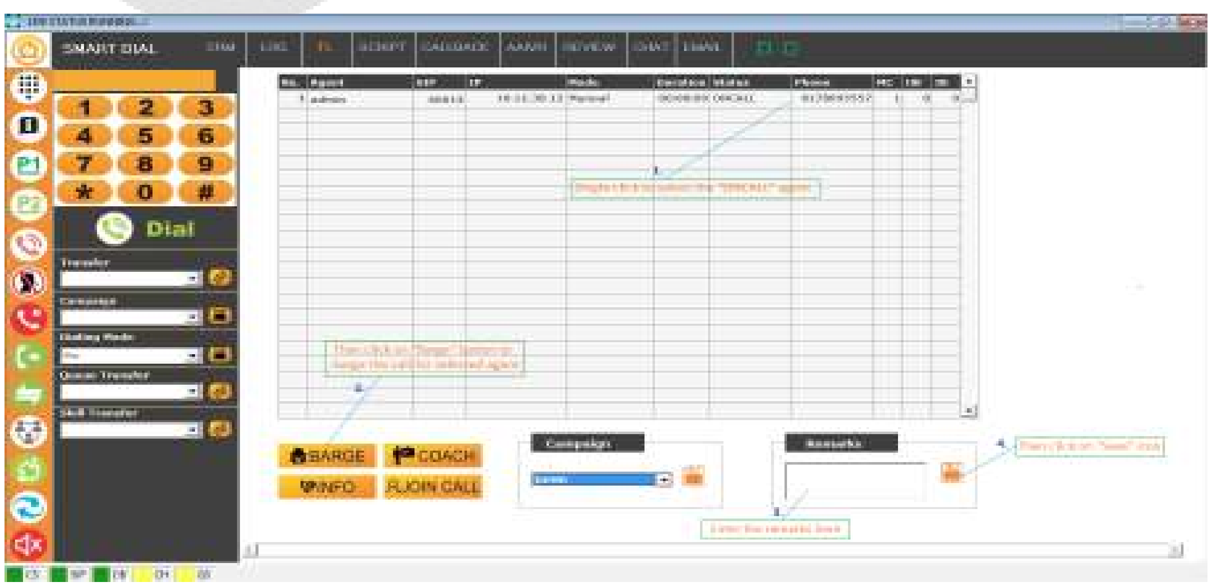


Barge

Step6: For Barging function user must have the permission for MO panel and barge

Step7: After that Single click to select the “On Call” agent

Step8: Then click on “Barge” button to barge the call



Step9: After clicking on barge button, TL can hear the conversation for live call between agent and customer

Step10: If TL wants to close the “barging call” for that agent

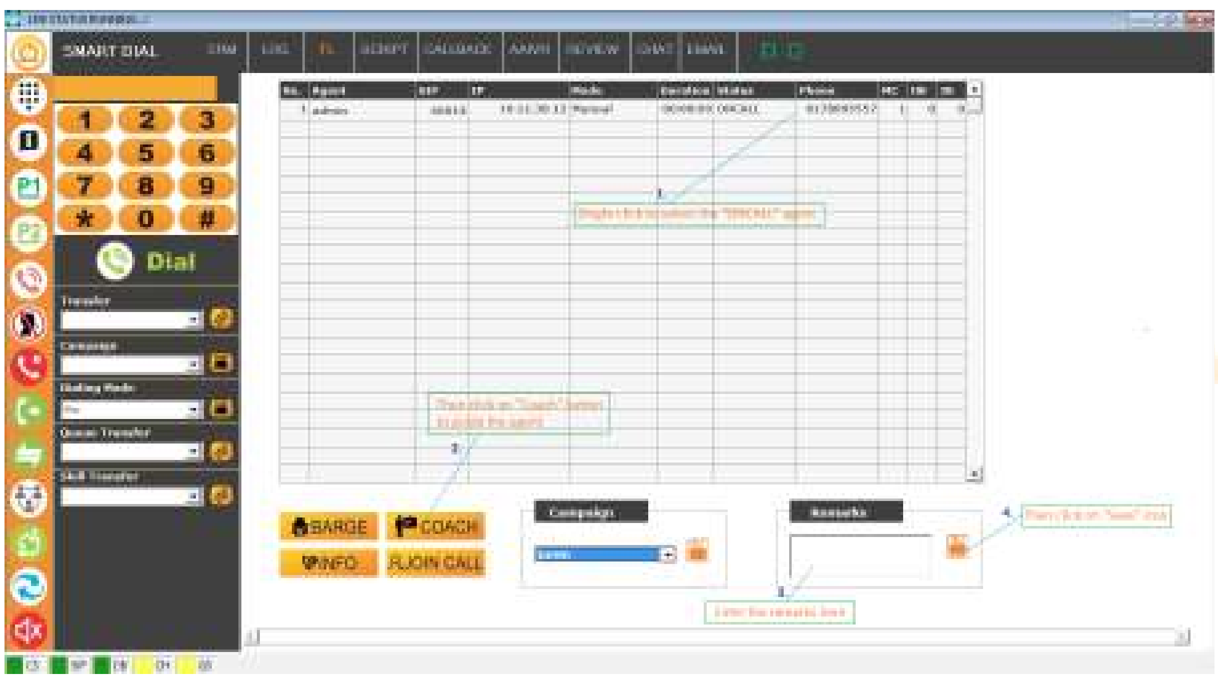
Step11: Then enter the remarks and click on icon

Call Coach

Step6: For Coaching function user must have the permission for MO panel and Call Coach

Step7: After that Select the agent by single click which is On Call

Step8: Then click on “Coach” button to guide the agent



Step9: After clicking on coach button, user can hear the conversation for live call between agent and customer

Step10: In coach function TL also interpret with the agent but customer can’t listen user voice

Step11: If TL wants to close the “call coach” for that agent

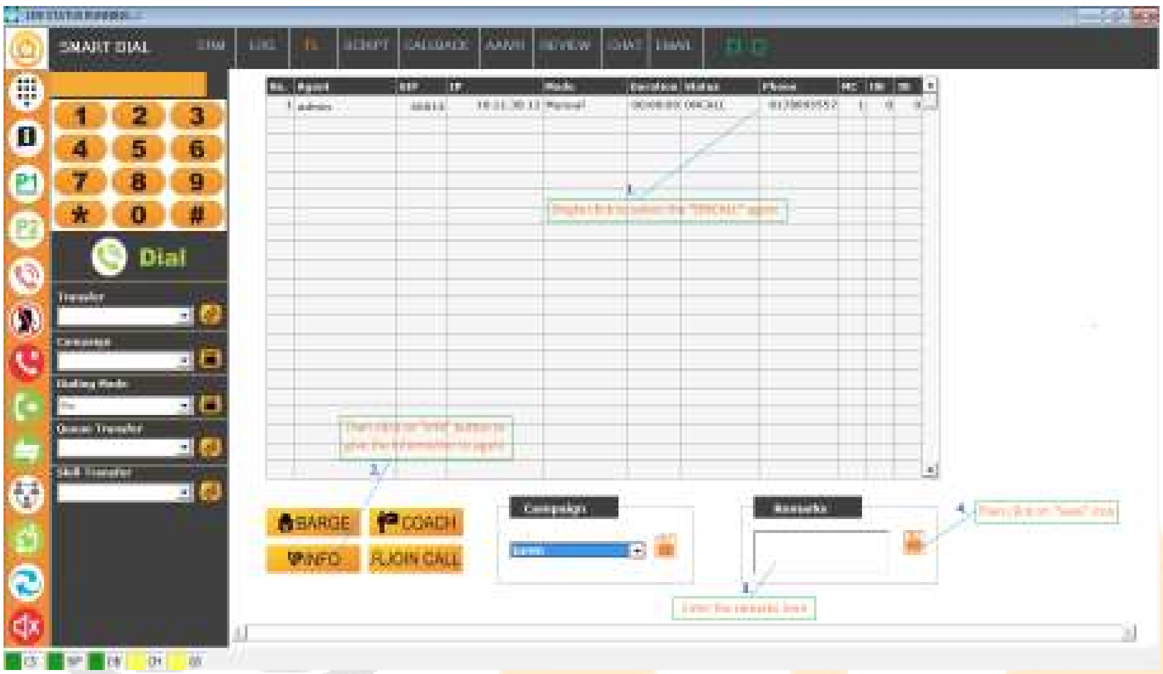
Step12: Then enter the remarks and click on icon

Call Info

Step6: For Info function user must have the permission for MO panel and Call Info

Step7: After that Select the agent by single click which is On Call

Step8: Then click on “Info” button



Step9: After clicking on Info button, user can provide the voice message to selected agent but can’t hear the conversation with the agent and customer

Step10: If TL wants to close the “Info” for that agent

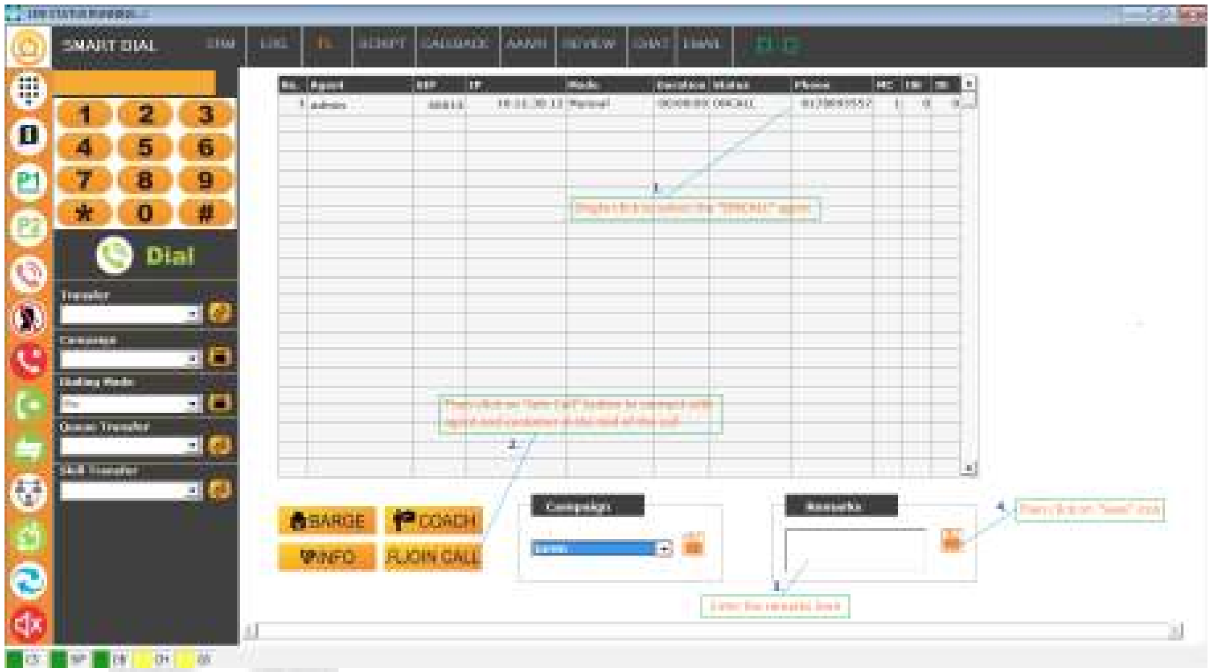
Step11: Then enter the remarks and click on icon

Join Call

Step6: For Join Call function user must have the permission for MO panel only

Step7: After that Select the agent by single click which is On Call

Step8: Then click on “Join Call” button



Step9: After clicking on “Join Call” button, TL connect with the agent and customer in the mid of call

Step10: If TL wants to close the “Join Call” for that agent

Step11: Then enter the remarks and click on icon

25. Progressive dialing

In Progressive dialing, agent initiates the calling session and when a call is connected, he answers the call.

To apply the progressive dialing, it is acquired to

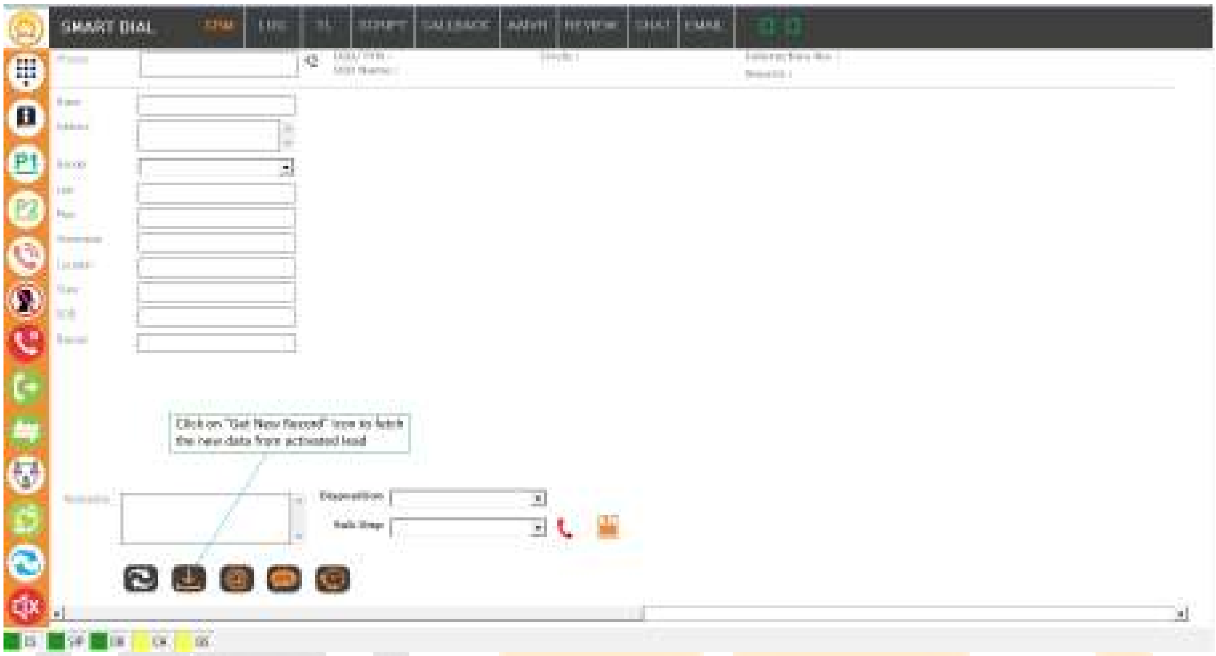
(i) Upload a lead in progressive mode via client panel
(ii) Then activate that lead via client panel
(iii) Login agent in progressive mode

Progressive dialing check through Desktop Agent:

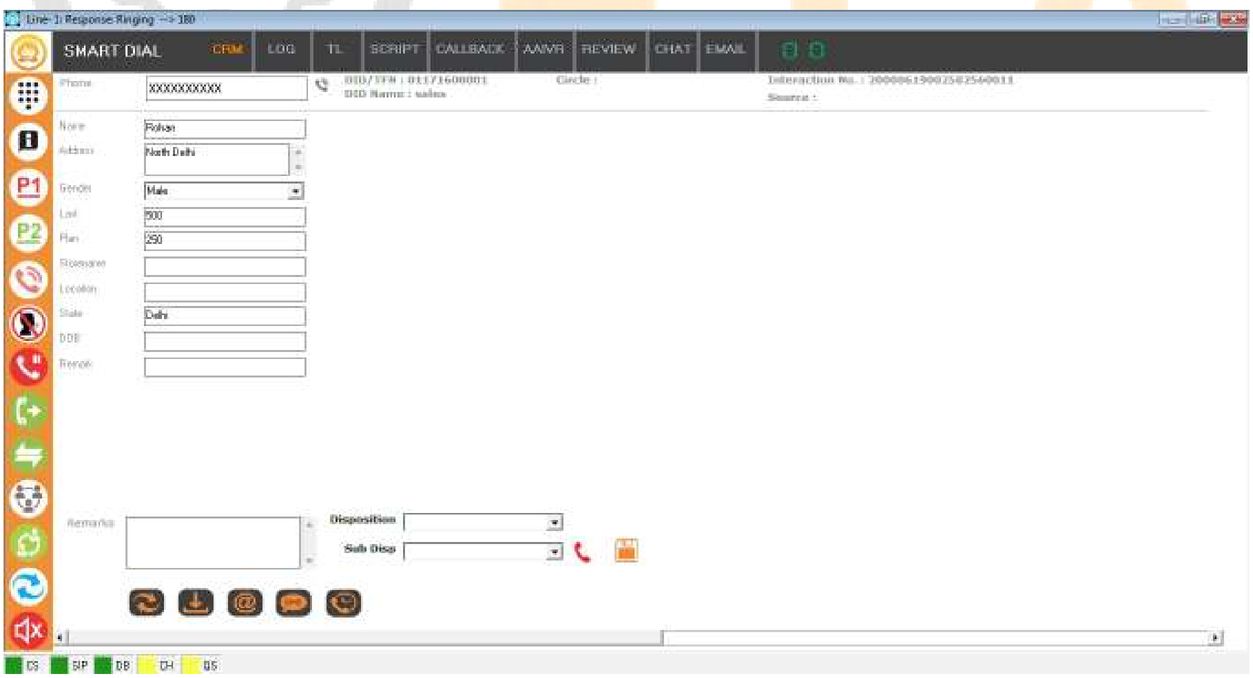
The objective of this test is to verify that progressive dialing works properly through the Desktop Agent.

Step1: Login in Desktop Agent with the dialing mode as progressive

Step2: Then click on "Get New Record" icon from CRM Page to get the new data from activated lead



Step3: When agent click on "Get New Record" icon then data shows on CRM Page and number dialed



Step4: After the call completion and call not disconnect by the concerned number

Step5: Then click on “Hangup” icon from default CRM Page for hangup the call

Step6: After that enter the details which necessary in CRM fields

Step7: Then select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step8: At last click on “Save Disposition” button to save the disposition and complete the call

Step9: After dispose Desktop Agent ready for the next call.

Step10: For next call repeat the steps from Step 2 to 8

26. Preview dialing

Preview dialing presents the agent with the information about the customer to be called and requires a response either to make the call or not to make the call.

To apply the preview dialing, it is acquired to

(i) Upload a lead in preview mode via client panel
(ii) Then assign that data to agent from “Assign Lead” via client panel
(iii) Then login agent in preview mode

Preview dialing check through Desktop Agent:

The objective of this test is to verify that preview dialing works properly through the Desktop Agent.

Step1: Login in Desktop Agent with the dialing mode as preview

Step2: Then click on “Get New Record” icon from CRM Page

Step3: When agent clicks on “Get New Record” icon then option show to agent for select the data according to search criteria

Step4: Select the field as follows:

(i) File Name (Mandatory)

(ii) Select the Particular field and enter the data in text box for search

(iii) Select the data on the basis of disposition (Status) and sub disposition (Sub Status)

Step5: Then click on “View” icon to view the data to user

Step6: When data shows on grid then double click on the data which you want to dial

Step7: After double clicked, concerned number dialed and all details fetched on CRM Page

Step8: After the call completion and call not disconnect by the concerned person

Step9: Then click on “Hangup” icon from CRM Page for hangup the call

Step10: After that enter the details which necessary in CRM fields

Step11: After that select the disposition with/without sub-disposition from Disposition and Sub Disp option

Step12: At last click on “Save Disposition” button to save the disposition and complete the call

27. Email send from Desktop agent

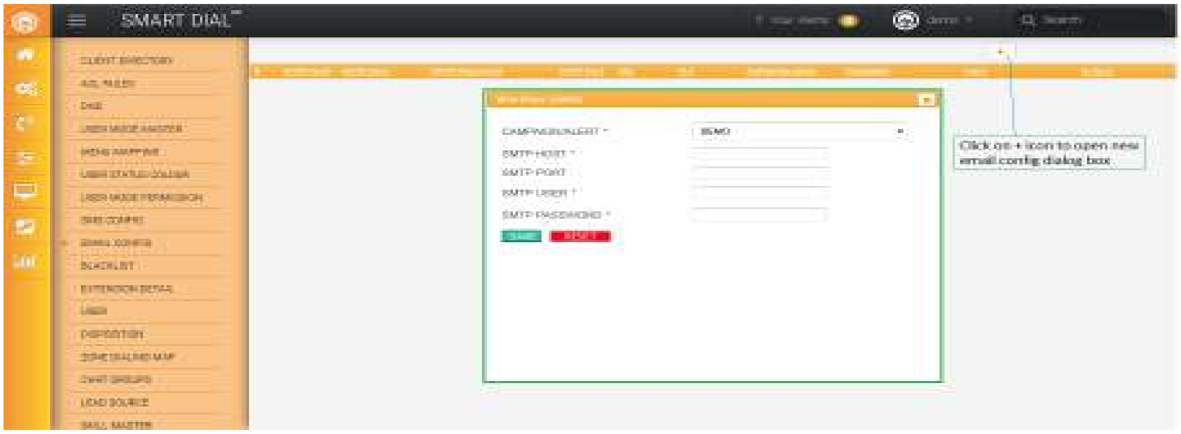
Email outbound configuration through client panel

Emil Configuration used to sending outbound message for campaign.

To add new configurations follow the steps as below:

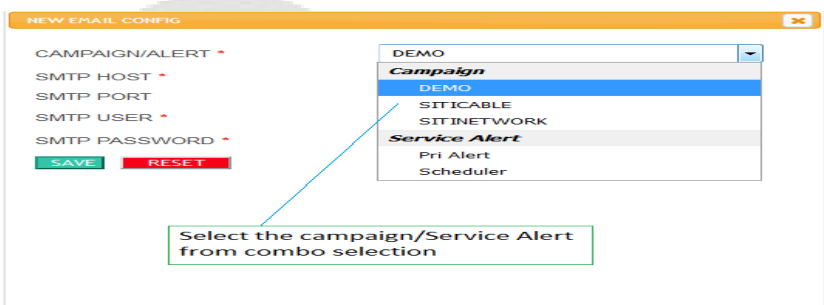
Step1: Go to system configuration menu, hit “Email Config” sub menu to open the Email Config page.

Step2: Now the Email Config page appears as follows:

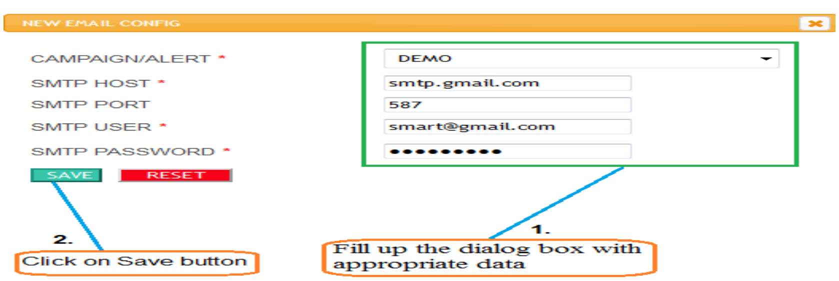


Step3: Then click on + icon to open new email Config dialog box

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



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



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

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

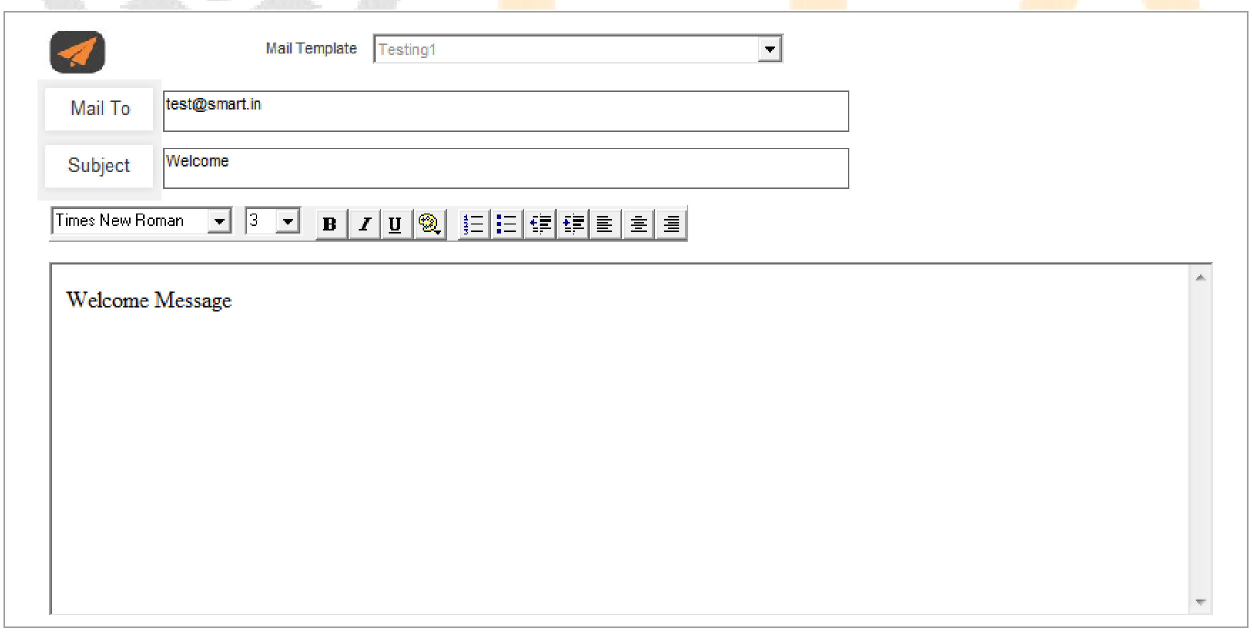
Email sends function check through Desktop Agent

The objective of this test is to verify that Email send function works properly through the Desktop Agent.

Step1: Login user in Desktop Agent

Step2: Dial/Receive call through the system

Step3: Then clicking on Email icon in CRM page, Email Dialog Box open for sending email



Step4: After that select the Template or enter the message contents

Step5: Enter the email-id in “Mail To” and Subject for email in ‘Subject’ field

Step6: After clicking on “Send” icon, email sent on email-id and dialog box closed for email

Step7: If call’s completed and call not disconnecting by the concerned number then click on “Hangup” icon from CRM Page for hangup the call

Step8: After that enter the details which necessary in CRM fields

Step9: Then select the disposition with/without sub-disposition from Disposition and Sub Disp option

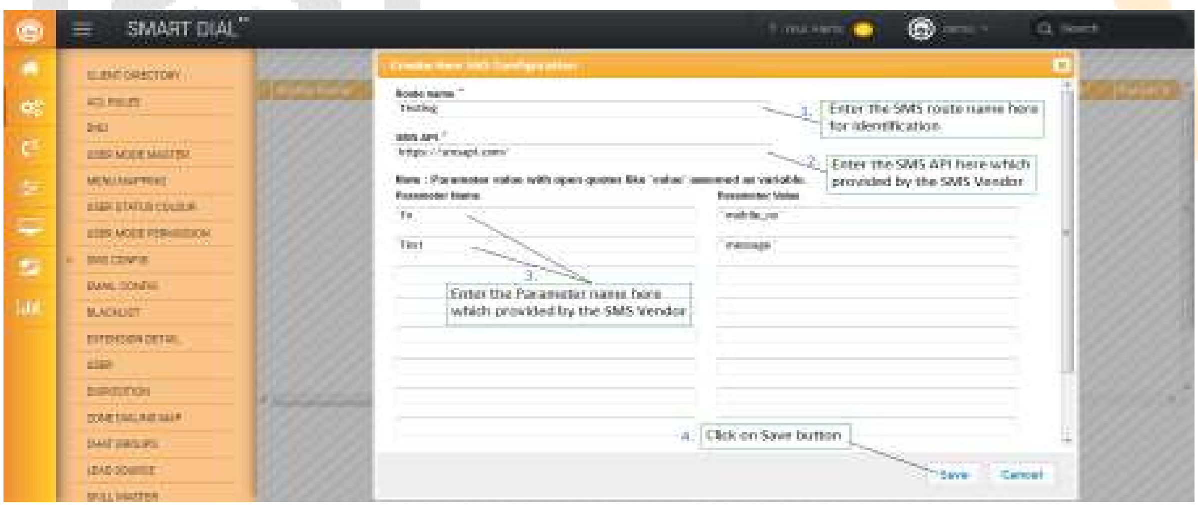
Step10: At last click on “Save Disposition” button to save the disposition and complete the call

28. SMS send from Desktop agent

SMS outbound configuration through client panel

Step1: First create the SMS route from below path

System Configuration Menu => SMS Config Sub menu



Step2: Then create SMS template from below path

Operational Configuration menu => Campaign Management sub menu => SMS Template Sub-sub menu

Step3: After that Map Agent Disposition with SMS Template and Route from below path

Operational Configuration menu => Campaign Management sub menu => SMS DISP Mapping Sub-sub menu

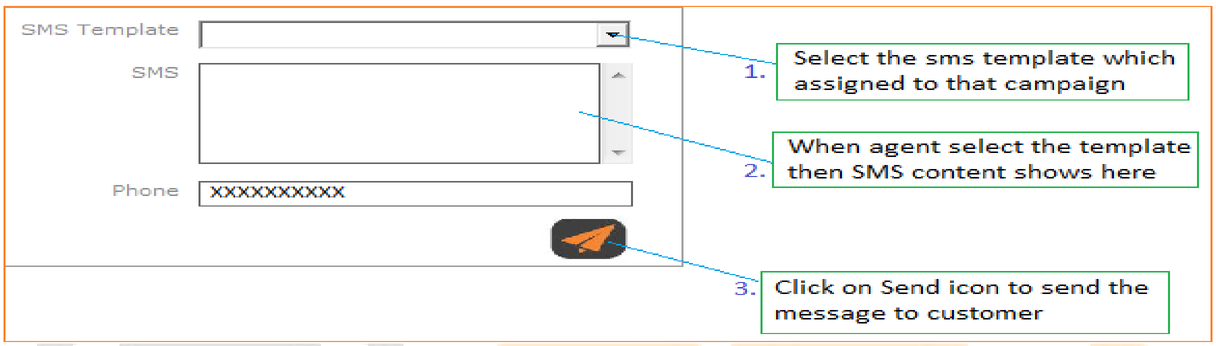
SMS send function check through Desktop Agent

The objective of this test is to verify that SMS send function works properly through the Desktop Agent.

Step1: Login user in Desktop agent

Step2: Dial/Receive call through the system

Step3: Then clicking on SMS icon in CRM page, SMS Dialog Box open for sending SMS to customer



Step4: After that select the Template which assigned to that campaign

Step5: Then clicking on "Send" icon, SMS sent on number and SMS Dialog Box closed.

29. History Function check through Desktop agent

The objective of this test is to verify that user check the "History" for the call properly through the Desktop Agent.

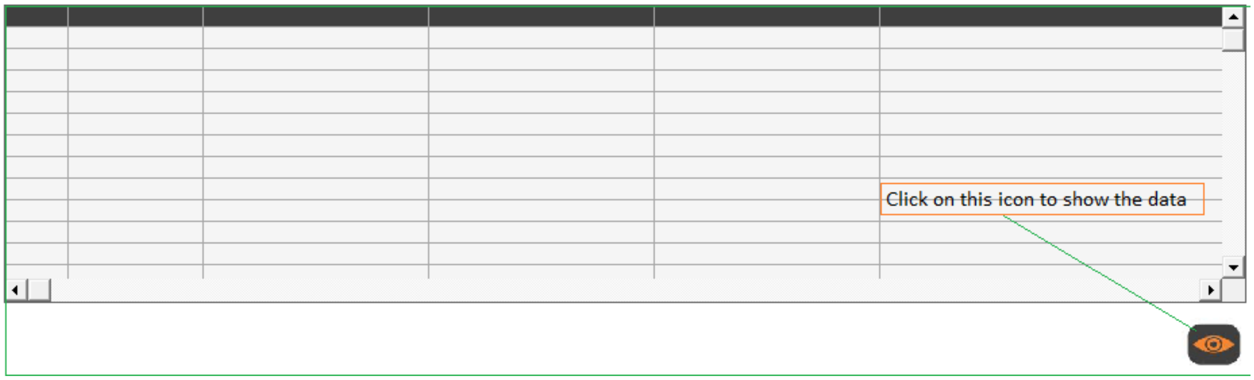
Step1: Login user through the Desktop Agent

Step2: Dial/Receive call through the system

Step3: Then CRM page open with the customer details

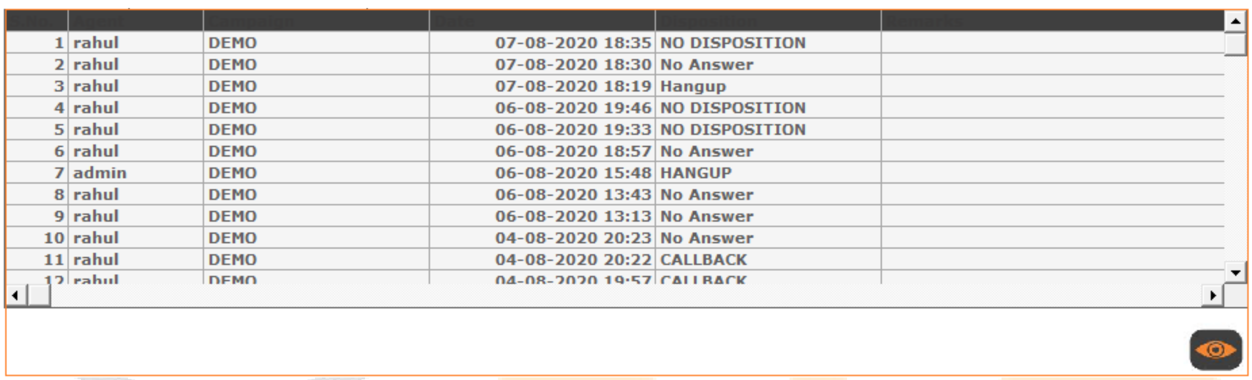
Step4: If user want to check data for the History then click on "History" icon in CRM Page

Step5: After clicking on "History" icon a small pop-up grid window open



Step6: Then click on this icon to show the customer number history

Step7: After click on view icon, data shows as follows:



1	rahul	DEMO	07-08-2020 18:35	NO DISPOSITION	
2	rahul	DEMO	07-08-2020 18:30	No Answer	
3	rahul	DEMO	07-08-2020 18:19	Hangup	
4	rahul	DEMO	06-08-2020 19:46	NO DISPOSITION	
5	rahul	DEMO	06-08-2020 19:33	NO DISPOSITION	
6	rahul	DEMO	06-08-2020 18:57	No Answer	
7	admin	DEMO	06-08-2020 15:48	HANGUP	
8	rahul	DEMO	06-08-2020 13:43	No Answer	
9	rahul	DEMO	06-08-2020 13:13	No Answer	
10	rahul	DEMO	04-08-2020 20:23	No Answer	
11	rahul	DEMO	04-08-2020 20:22	CALLBACK	
12	rahul	DEMO	04-08-2020 19:57	CALLBACK	

Step7: For closing the History window click on icon again