ESI eCloud

Enterprise Contact Center
Administrators Guide

This document is designed to support administrators and supervisors in effectively navigating the CLOUDAGENT Enterprise Contact Center Portal. It aims to familiarize them with the diverse range of options and functionalities that the portal offers.

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Overview

This course is designed to support administrators and supervisors in effectively navigating the CLOUDAGENT Enterprise Contact Center Portal. It aims to familiarize them with the diverse range of options and functionalities that the portal offers.

Through comprehensive guidance, the course covers the step-by-step process of configuring CLOUDAGENT for inbound, outbound, and chat campaigns. It also includes detailed instructions on creating agents and defining their roles within the system.

Please be aware that throughout this guide, the terms "Admin" and "Administrator" are used interchangeably, both referring to the individual responsible for overseeing the operations of the CLOUDAGENT portal.

Outcomes

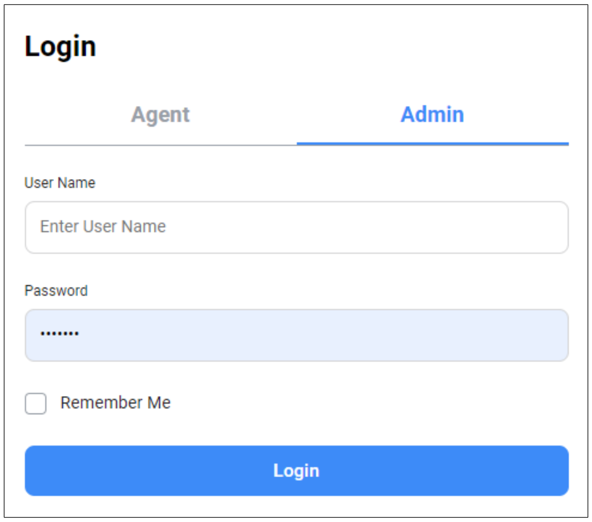
Upon completing this lesson, a learner will be able to perform the following tasks:

- Login to the CLOUDAGENT Portal as Admin
- Navigate the Home Page
- Understand and configure Campaigns
- Understand and use the Configurations option
- Understand Callback
- Understand Chat
- Adding Sub-Admin
- Understand templates
- Logout of the Admin portal

Logging in

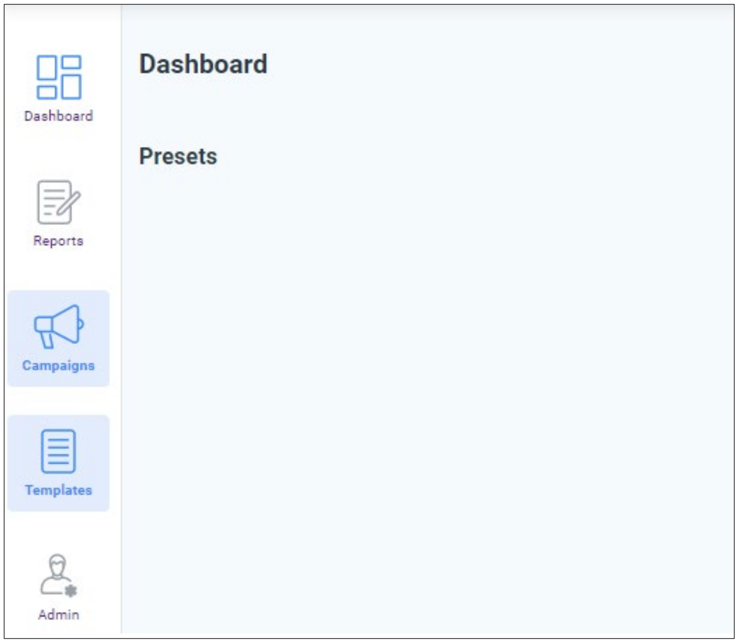
Google Chrome and Mozilla Firefox are the supported browsers for CLOUDAGENT. The images used in the guide are typically taken on Google Chrome, but they should also be applicable to Mozilla Firefox as well.

Open the webpage to reach the login screen.



To access the Admin Portal, click on the **Admin** tab and enter the Username and Password provided by ESI. Once logged in, you can add the page to your favorites for easy access in the future.

Once the Administrator logs in to the Portal, the home screen appears with the menu options **Dashboard**, **Reports**, **Campaigns**, **Templates**, and **Admin**.



The toolbar options are as follows:

- **Dashboard** (Real-time dashboards, Reports of the Current day)
  - Used to get an instant view of the Call Center and Agent Status, Agent Monitor, and System Monitor.
- **Report** (for Live and Historical data)

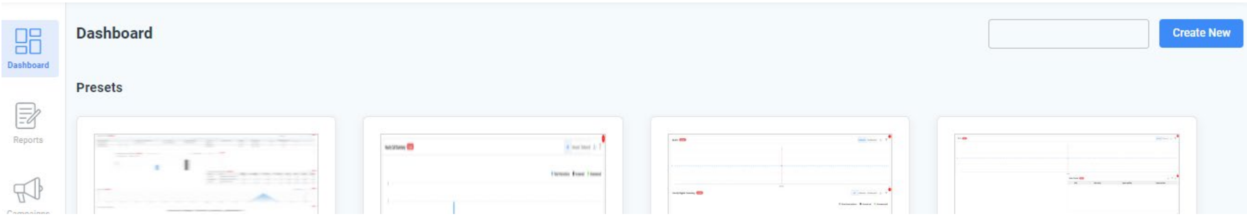
    - To get the Call detail records, Admin Dashboard, etc.
- **Campaigns**
    - To conduct Inbound and Outbound calls using Manual, Predictive or Progressive dialing.
- **Templates**
    - To create default template messages for Email, WhatsApp, and SMS.
- **Admin**
    - To add Users, Agents and to configure Telephone numbers, Skills, Pause reasons, and Dispositions. etc.

All the tabs will be explained in detail in the following sections.

Dashboard

The dashboard displays information in a graphical format, such as charts, graphs, and tables, and allows users to interact with the data in various ways, such as by drilling down into details or filtering the data.

Dashboards provide real-time insights and help users make informed decisions. They can be customized to show specific data and metrics that are relevant to evaluate the performance of the call center and agents.



This feature enables you to create your own dashboard using the provided list of widgets. Each widget displays unique data that can be used by the administrator to evaluate the performance of the call center and agents.

The available widgets include:

- **Carousel:** With this option, you can add up to five different widgets and easily navigate between them by shuffling through.
- **SLA:** This widget presents the current SLA percentage and the designated target SLA for all available skills within the account. Utilize the filter button to choose specific skills for viewing.
- **Call status:** This Widget gives the following call status data for the modes such as Voice, Digital, Manual, Preview, and Progressive.
    - Average Handle Time
    - Avg. Talk Time
    - Avg. Hold Time
    - Avg. Wrap-up-Time
    - Average Answer Time
    - Total Calls
        - Total Answered
        - Total Abandoned
        - Active calls
- **Queue Counter:** This Widget provides the following details for the available skills in the account.
    - Call waiting time
    - Available agents
    - Longest wait time
- **Location Queue Counter:** This widget provides the following details for the available skills in the account.
    - Skill Location
    - Skill Details - This field will remain empty if no input is provided on the 'Skill details' field during the Skill configuration process.

    - Calls Waiting
- **Overall Queue Counter:** This widget displays comprehensive details for all skill locations within the account.
    - Skill Location
    - Skill Details - This field will remain empty if no input is provided on the 'Skill details' field during the Skill configuration process.
    - Calls Waiting
- **Agent list:** This widget provides the following details of the logged-in agents.
    - Agent ID
    - Agent Name
    - Campaign Name
    - Call Type
    - Agent Phone Number
    - Skills
    - Customer No.
    - Mode
    - Hold Time
    - State
    - Last Call Status
    - Duration
    - Admin Actions
        - Release
        - Logout
        - Bargein
- **Agent Performance:** This widget provides the following data which shows the agent performance
    - Agent ID
    - Agent
    - Skills
    - Avg. Hold Time (00:00)
    - Total Interactions
    - Answered
    - Answered %
    - Abandoned
    - Abandoned %
    - AHT (Average Handling Time)
    - ASA (Average Speed of Answer)

- ACW (After Call Work)
- Pause Time (00:00)

- **Agent State Counter** This widget tells the agent state count (whether it's a ready / Busy / paused state) across all the modes available (Eg. Manual, preview, progressive, Blended)
- **Hourly Call Summary:** This widget offers a graphical representation of call volume (including Total Interactions, Answered Calls, and Unanswered Calls) over time.
- **Skill Summary**: This widget provides data only for Inbound campaigns and offers the following insights for the available skills in the account.
  - Skill
  - Total Calls
  - Skill Queues
  - Total Agents
  - Calls per Agents
  - Longest Call in Queue
  - Answered Calls %
  - Abandoned
  - SLA%
  - ATT
  - AWT
  - ASA%
  - AHT
  - Agent Disconnect
  - Agent Disconnect %
  - Agent Staffed
- **Top Disposition:** This widget presents data regarding the most frequently used dispositions and the frequency of their usage.
- **Live Calls** This widget displays the following data for all ongoing live calls.
  - Agent Name
  - UCID
  - Campaign name
  - Customer number
  - Customer status
  - Agent status
- **Pacing:** This widget presents a comparison of Calls and Campaigns data. This functionality is specifically designed for Predictive campaigns.
- **Drop Ration:** This widget showcases the Current and Expected Drop Ratio percentages for all Predictive Campaigns.

- **Data Summary:** This widget provides the following data for the campaigns available in the account.
    - Campaign
    - Total Calls
    - Call duration ranges in minutes
        - 0-3, 3-5, 5-10, 10-15, 15-30, 30-6, and Above 60 min.
- **Agent List V2** This displays the following data for the logged-in agents
    - Agent Id
    - Agent Name
    - Campaign Name
    - Call Type
    - Customer No.
    - Hold Time
    - Mode
    - Skills
    - Last Call
    - State
    - Duration
    - Details (Agent details for the current day)
        - First Login Time
        - Total idle time
        - Total login duration
        - Total pause time
        - Total talk time
        - Total wrapup time
        - Answer rate (From the first login to the present time)
        - Suggestion
- **Comparative Call Trends:** This widget provides call volume data over time for comparison.
- **Outbound Call Campaign:** This widget presents interaction call volume data compared to different campaigns.
- **Hourly Digital Summary:** This widget displays the chat volume on an hourly basis, showing key statistics like Total Conversations, Connected Chats, and Abandoned Chats.
- **Chat Status Digital:** This widget offers the subsequent data for the ongoing chats within the account.
    - Session ID
    - Campaign Name
    - Skill

- Agent ID
- Agent Name
- Email ID
- Phone
- UUI
- Duration
  - Action
  - Transcript
  - End Chat

- **Channel Status Digital:** This widget displays the following live information for different channels, such as WhatsApp, Web Chat, and SMS.
  - Total Session Time
  - Average First Response Time
  - Average Response Time
  - Average Session Time
  - Total Conversations
    - Total Connected
    - Total Abandoned
- **Agent Performance Digital:** This widget provides agents' real-time chat performance metrics, featuring the following data points. You can customize the data view by filtering it according to campaigns, skills, or groups.
  - Agent ID
  - Agent
  - Skills
  - Total Conversations
  - Total Connected
  - Total Abandoned
  - Total Session Time
  - Avg. Session Time
  - Avg. Response Time
- **Skill Summary Digital:** This widget provides the following data for the WhatsApp, Web Chat, and SMS channels.
  - Skills
  - Total Conversations
  - Total Agents
  - Conversation per Agents
  - Longest Conversation Time

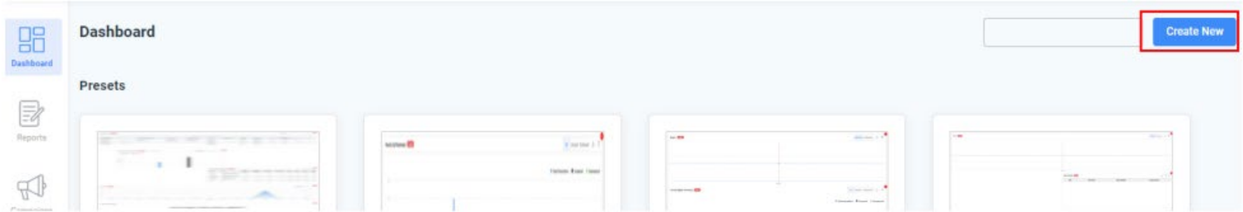
    - Total Connected
    - Total Connected %
    - Total Abandoned
    - Total Abandoned %
- **Performance Metrics:** This widget provides an in-depth analysis of your account's performance, covering both calls and chat conversations. You can filter the data by campaign, skill, and agent group. Key metrics include:
    - Avg. Wait Time
    - Calls/Agent and Chats/Agent
    - Avg. Handling Time
    - Avg. Wrapup Time
    - SLA %
    - Calls in queue / Chats in queue
    - Wrapup Time Exceeded
    - Call Connection Ratio
    - Agent Disconnect %
    - Agent Disconnect Calls
    - Abandoned Calls/Chats
    - Abandoned Calls/Chats %
    - Avg. Speed to Answer
    - Avg. Talk Time (Calls/Chats)
- **Activity Log:** This widget offers a detailed analysis of agent activity, including a continuous data feed and a summary of their interactions. You can filter the data by agent name. The tabs include:
    - All - Covers all agents' logs.
    - Hold - Logs of agents on hold.
    - ACW - Logs of agents in After Call Work.
    - Busy - Logs of agents marked as busy.
    - Break - Logs of agents on break.
- **Interaction Queues:** This widget provides live queue updates for customer interactions, including both calls and digital (chat) conversations. It offers detailed information for both skill-wise and agent-wise queues.
    - **Call Queues**
        - Skill wise queues
            - Skill
            - Campaign
            - Caller Number
            - Duration
        - Agent wise queues

            - Agent
            - Skill
            - Campaign
            - Caller Number
            - Duration
        - **Digital Queues:** The widget provides similar data for digital interactions, ensuring comprehensive and live information for your analytics.
- **Interaction Trend:** This widget provides live trends for calls and chats in your account, offering valuable analytics. It displays real-time data for inbound, outbound, and digital channels separately, all within the same day.
    - You can filter the data by:
        - Campaigns
        - Skill
        - Groups
        - Time Period (within the same day)

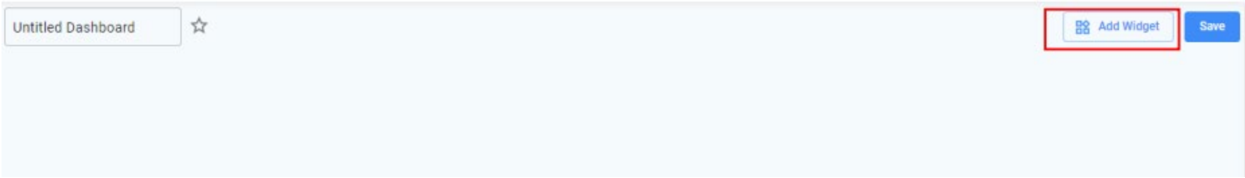
Building a Dashboard

To build a new dashboard, follow the below steps:

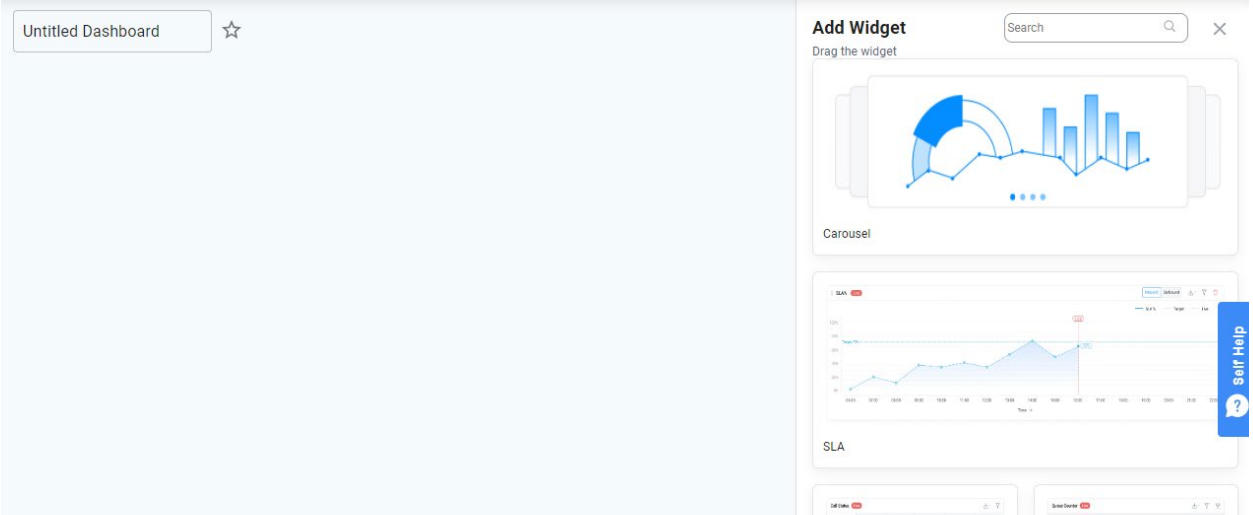
1. From the top right corner of the dashboard home screen, select the **"Create New"** button to start a new dashboard.



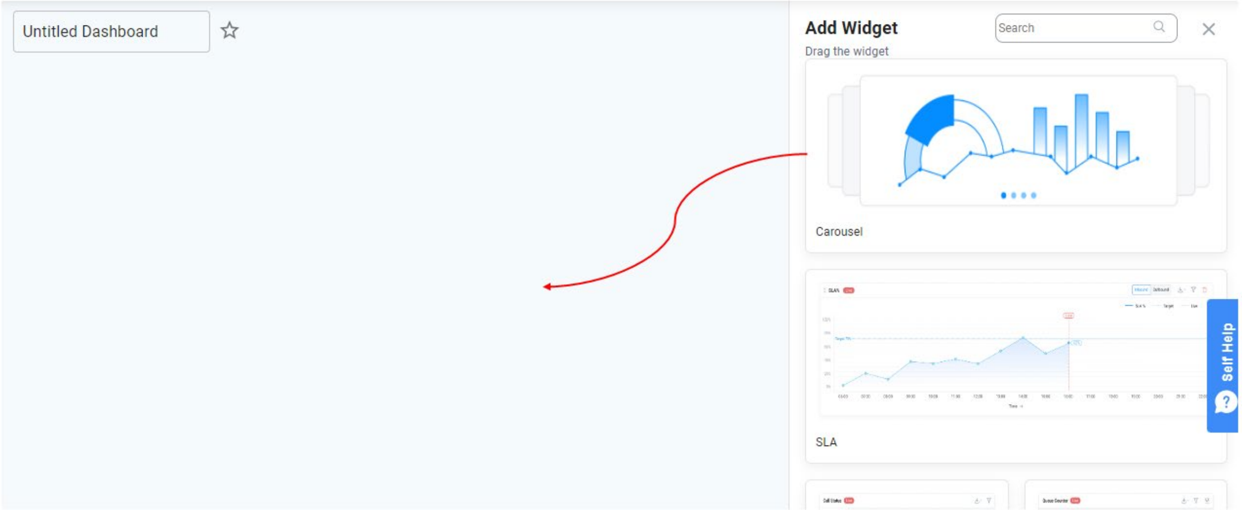
2. The **"Add Widget"** button will appear.



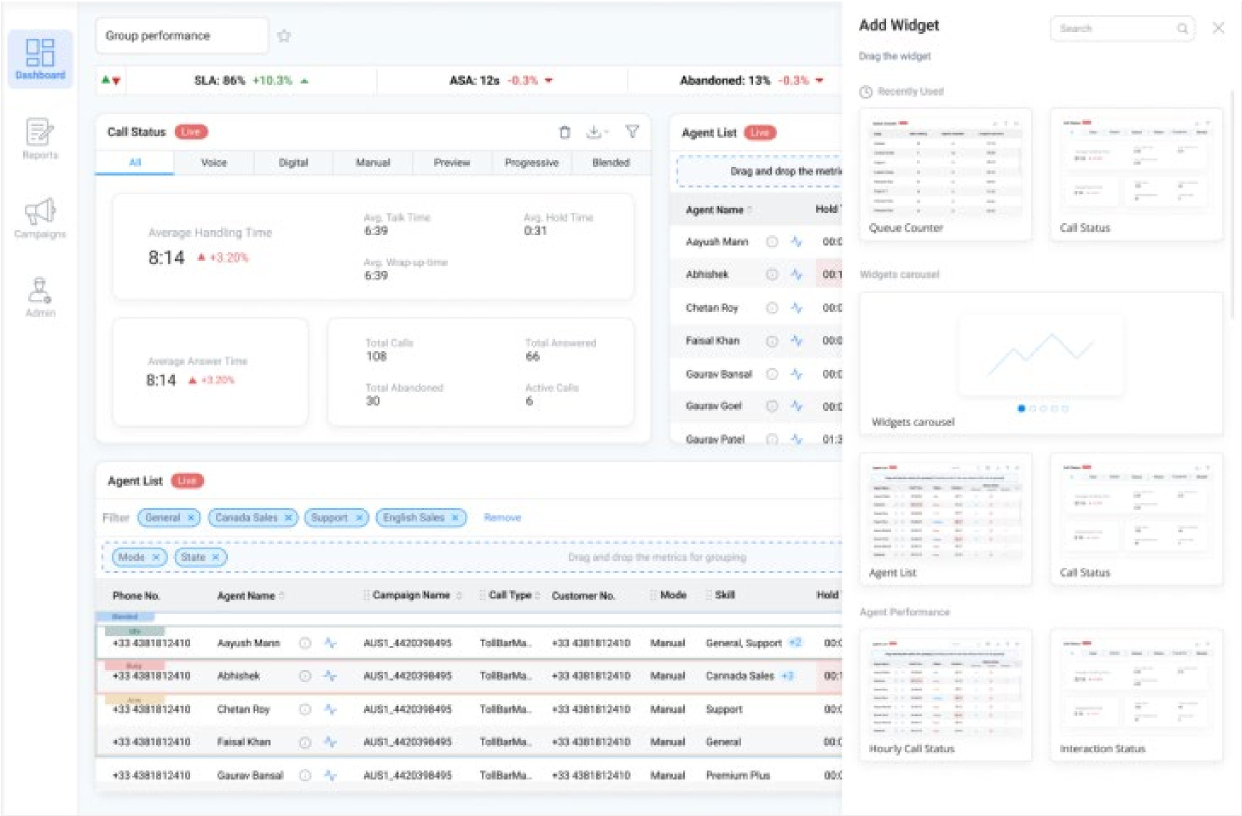
3. Click on the **"Add Widget"** button to display the list of available widgets on the right side of the screen.



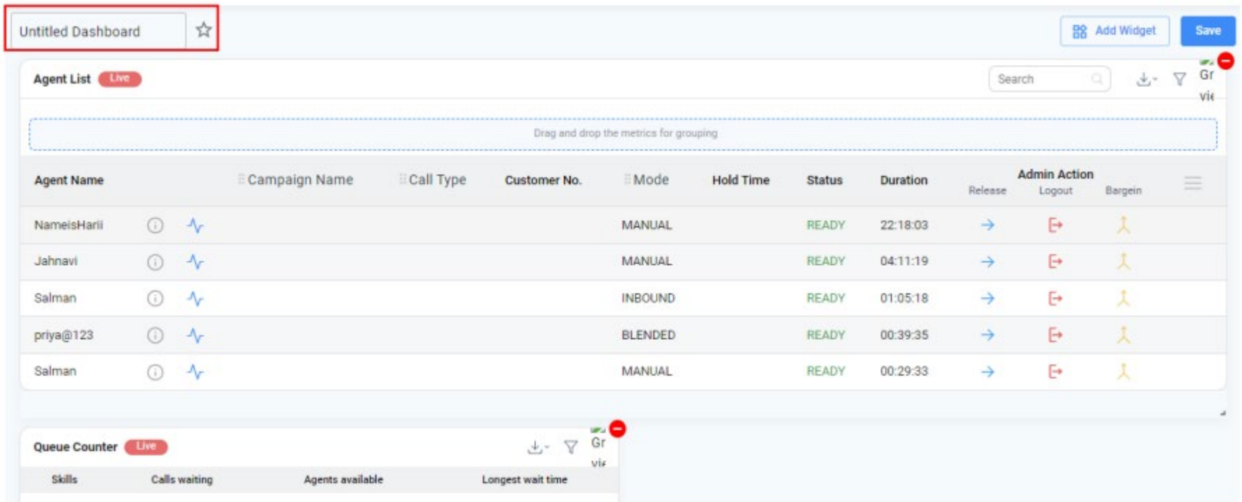
4. Drag and drop the desired widgets onto the dashboard for customizing it.



5. Below is an example of **Call Status** and **Agent List** added to the Dashboard. You have the feasibility of adjusting the widget order.



6. Once you have set up the widgets, name your dashboard and click the **"Save"** button in the top right corner.



7. To mark a dashboard as a favorite, click the **star** icon next to the dashboard name. This will place it at the top of your list of dashboards.

Note

All the widgets on the dashboard have filter options. If you apply filters to a widget and save your dashboard, the filters will be preserved. The filters will remain in effect until you make and save changes to the dashboard again.

Dashboard Components

The new dashboard in the CloudAgent system is designed to provide a comprehensive and customizable view of the key performance metrics and data for your campaigns and agents. The following main sections of the dashboard provide different levels of customization and functionality to meet the needs of different users.

Preset: The Preset section includes the default dashboard templates that are provided by the system, which can be used as a starting point for creating custom dashboards.

Wallboard The Wallboard is akin to a TV monitor screen, equipped with fixed widgets. You possess the flexibility to eliminate unwanted widgets. Within this interface, you can monitor parameters such as SLA, ASA, and Skill queue trends to determine if they are on an ascending or descending trajectory.

My Favorites: The My Favorites section provides quick access to all the dashboard templates that have been marked as favorites by the user. This allows users to quickly access and view their preferred dashboards without having to navigate through the various dashboard options.

My Dashboard: The My Dashboard section contains all the custom dashboards that have been created by using various widgets, such as Agent Performance, Agent State Counter, Hourly Call Summary, etc. This section provides allows users to create and save their own unique dashboard layouts and views to meet their specific needs.

Campaigns

Campaigns are created to effectively manage a specific type of interaction. Campaigns efficiently handle a large volume of incoming and outgoing interactions, such as calls, emails, chats, or social media messages.

Before getting started with how to create a campaign in your Cloud Agent account, first let's get some understanding of different campaign types.

Preview

In outbound calling, a preview campaign refers to a specific type of calling campaign where agents are provided with a preview of the contact or lead they will be calling before making the actual call. It allows the agent to review relevant information about the lead, such as their name and contact details. The preview period is typically a short duration, allowing the agent to quickly review the lead details and decide whether to skip or dial the number.

Progressive

In outbound calling, a progressive campaign is a type of calling campaign where calls are made in a sequential or progressive manner. Progressive campaigns involve making one call at a time, following a specific order or priority.

In a progressive campaign, the system or software automatically dials a phone number and connects the call to an available agent. Once the call is connected, the agent interacts with the contact. After the call ends, the system automatically moves on to the next phone number in the list and repeats the process.

This type of campaign provides a controlled and sequential calling process, ensuring that each call receives dedicated attention while maximizing agent productivity.

Predictive

In outbound calling, a predictive campaign is a type of calling campaign that utilizes predictive dialing technology to automatically dial a large volume of phone numbers and connect them to available agents. The predictive dialer uses algorithms and historical data to predict agent availability and call handling times, optimizing the calling process for maximum efficiency.

Predictive campaigns are commonly used in scenarios where there is a large volume of leads to be contacted. By using predictive dialing technology, one can efficiently manage and optimize outbound calling efforts, improving the overall contact rate and agent productivity.

IVR

An IVR (Interactive Voice Response) campaign in outbound calling involves using an automated phone system to interact with the intended audience or contacts through pre-recorded voice messages. IVR technology allows organizations to deliver targeted messages or announcements to a large number of recipients without the need for manual intervention from agents.

In an IVR campaign, the system dials the phone numbers and, when the call is answered, an automated voice prompt greets the recipient and presents them with options or information. The recipient can interact with the system by pressing specific keys on their phone to choose from different menu options or respond to the message.

Agent-wise / Non-agent / Skill wise dialing

Agent-wise and non-agent-wise dialing are different strategies used in outbound (Preview and Predictive) calling campaigns to manage and optimize the dialing process.

Agent-wise dialing

This feature ensures a direct connection between a designated agent and a specific customer. Configuration is achieved during data upload to the campaign. In cases where the designated agent is momentarily unavailable, the call is held until the agent becomes accessible.

Non-agent-wise dialing

With this method, calls are efficiently routed to available agents at random. No fixed agent-customer pairing is involved, eliminating the notion of sticky agents.

Skill-wise dialing

In this approach, calls are skillfully screened, and the system matches the customer's needs with an available agent possessing the necessary skill set. This guarantees precise and effective call routing every time.

Offline campaign

Enabled using the check box Offline Mode / Offline On in the campaign settings.

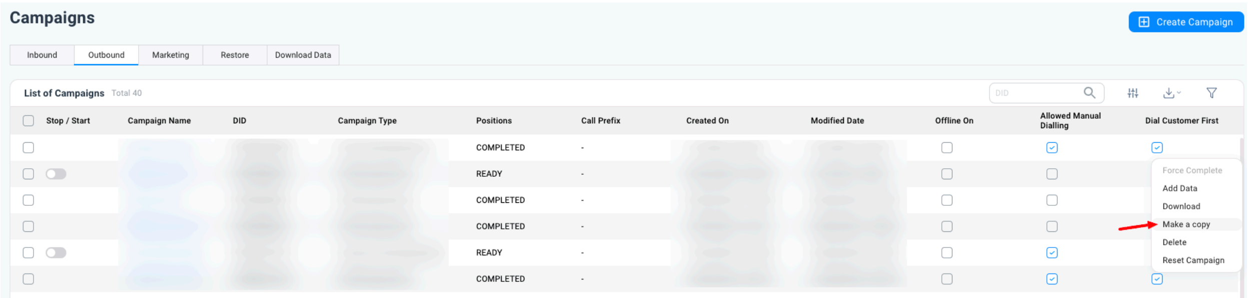
- When a campaign is set to offline mode, incoming calls are directed to a designated skill and will be connected to available phone numbers for hunting. This applies to both inbound and outbound campaigns.
- Number that is available for Telco, (Not busy on another CLOUDAGENT call), gets connected first.
- Offline mode is typically used when internet connectivity is lost or when field executives need to take calls without logging into the system.

Online campaign

- When a campaign is in online mode, incoming calls are directed to a designated skill, which then routes the call to an available agent who is logged in and assigned to that skill.
- If no agents are logged in, the call is placed in a queue until an agent becomes available or it is directed to a fallback rule, such as being transferred to a different skill or an automated system. This is based on the queue wait time and fallback rule set in the skill configuration.

Cloud Agent offers different campaign creation options for your contact center requirements. In the next articles, we will explore each campaign in detail, accompanied by concise instructions on how to create them effectively.

Note: Campaigns can be created easily from an existing campaign using the 'Copy Campaign' option as shown below.



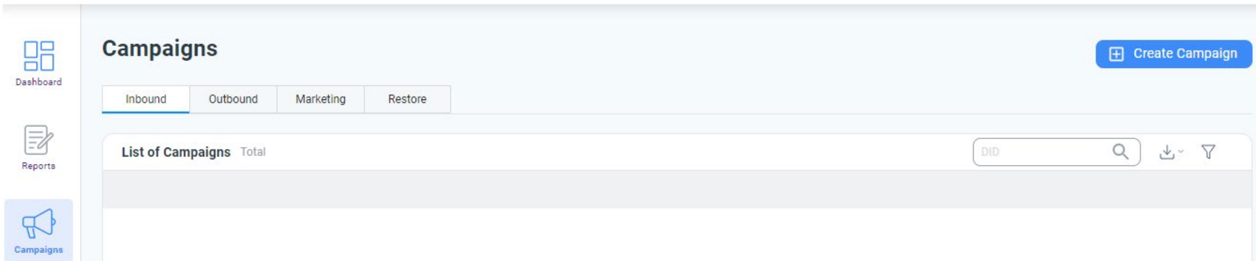
Inbound Campaign

An inbound campaign manages and handles incoming customer interactions. These interactions can come through various channels such as phone calls, chats, and social media messages. Agents who are trained and configured to handle inbound calls can be assigned to this campaign. The objective of an inbound campaign is to provide efficient and effective customer service by promptly answering and addressing customer inquiries and concerns.

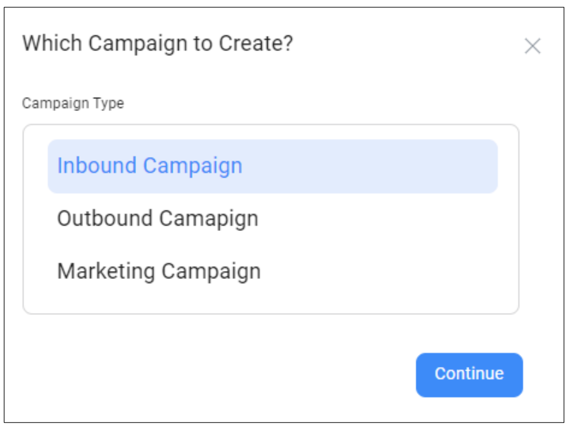
Creating Inbound Campaigns

Follow the instructions below to create an Inbound campaign in your Cloud Agent account.

On the campaigns page, Click **Create Campaign** on the top right corner to create a new Campaign.



A pop-up opens to select the campaign type to be created, select the **Inbound Campaign**, and click **Continue** to proceed further.



Fill in all the campaign information needed in the fields. The campaign needs to be associated with a skill. The description of all the fields follows in the below table.

Basic Settings

Field	Description
Campaign Name (required)	The name of the Inbound Campaign.
Campaign Type (required)	Inbound
Sub Admin Assigned	List of the sub-admins who can access this campaign.
DID (required)	Telephony number mapped to the Inbound Campaign. This is the number

Field	Description
	that the customers dial for this Campaign.

General Information

Field	Description
IVR Flows	Select the IVR flow needed for the campaign from the dropdown.
Hit ScreenPop URl at	**1. Client-side:** If this is configured, the Caller Number / Campaign Name / Skill Name is passed to the Agent browser side so that the data appears as an IFrame. **2. Server Side:** The caller details are passed to the CRM Server if this is configured. The data is captured in CRM access logs. This is typically used by Agents / Clients who are not logged into the browser but can still access CRM data. Generally used in Offline Campaigns which allow the data to be accessed by CRM, during the call. **3. Client-side On Busy:** This is similar to **Client-Side**, but, CloudAgent sends the ScreenPop only when the agent becomes BUSY. (i.e., only when he is On Call). So, the IFrame on the agent screen is opened only when the agent is on Call. i.e., the Client is BUSY. **4. Client and Server:** CloudAgent hits the ScreenPop URL to both the Client Side & Server side of CRM. IFrame is also opened and Access logs of CRM will get the data in the backend, #1 & #2. **5. Plugin:** This is used for the integration of ZOHO CRM. At this point, we use the ScreenPop URL field = ZOHO.
URL to Push	This field is used to specify the URL where callback details will be sent. For detailed information on configuring the Callback URL, please refer to the Callback URL configuration article.
ScreenPopURL	This is the URL provided by the CRM vendor to fetch the data from the CRM system and show it as an IFrame on the agent screen. For detailed information on configuring the ScreenPopURL, refer to the Screen Pop Config article.
Call Prefix	Caller IDs prefix code (Eg: +91, 0, ..)
Dispositions (required)	List of Disposition codes available to the agent for this Campaign. This is used to tag a call to a specific type such as a service call or inquiry call etc.
Disposition Type (required)	These options refer to different ways that a disposition, or outcome, can be assigned to a call.

Field	Description
	1. None: If this option is selected no disposition is tagged to the call. **2. API:** This option indicates that the disposition will be assigned through an application programming interface (API). **3. Toolbar:** This option is widely used. If this option is selected a pop-up will be opened to fill the call summary.
Wrap-up Time (In Seconds)	This is the time in seconds available to the agent for after-call work. Value 0 (zero) means an infinite time for the agent.
Block Number	A "Blocked Number" option in a campaign refers to a feature that allows you to prevent certain phone numbers from being called. If the "Block Number" option is selected, the system will check the list of blocked numbers before making a call. If the number being called is on the blocked list, the call will not be made. This can be useful for preventing calls to numbers that have previously requested not to be called, or to numbers that have been flagged as spam or fraud.
Block Number Group	This group can be created and managed by the user or administrator. The "Block Number Group" is a named list of phone numbers that have been designated as blocked numbers. Once a group is created, it can be easily referenced by name when setting up a campaign. This feature allows for greater flexibility and ease of management when it comes to blocking numbers.
Play Disclaimer URL	You can add an audio file that will play to the customer as a disclaimer as soon as they answer the call. The file can be in .mp3 or .wav format. This works only if **"Allow Manual Dialing"** is enabled for inbound campaigns.
Daily Outbound Limit per Number	Specify the numerical value to set the maximum dialing attempts for a number in a day within the campaign. This works only when the campaign is set to Allowed for Manual dial.
Music Files	1. On Hold 2. On Transfer

Campaign settings

- **Offline Mode:** This feature allows agents to continue working on the campaign even when they are not logged in to the CloudAgent account.
- **ACW for Unanswered Call:** Check this box if you want the Agent to wrap up Unanswered calls. With this box checked, Agents will go to ACW State even for unanswered calls. By default, this box is unchecked.
- **Allow Manual Dialing:** This feature allows the agents to make manual calls.

- **Apply DID masking:** This feature enables the masking of DID (Direct Inward Dialing) numbers - providing an enhanced level of privacy and security.
- **Agent to Agent calling:** This feature permits agents within a contact center to place direct calls to each other. To activate this function, ensure that the "Allow Internal Calling for Agents" setting is enabled in your account. For more information on the setting, refer to the admin settings page.
- **Apply DNC Regulation:** This feature enables the monitoring of customers' time zones to determine the appropriate calling times for each customer. This ensures that customers are contacted at suitable hours, respecting their local time and adhering to DNC regulations.

Skills:

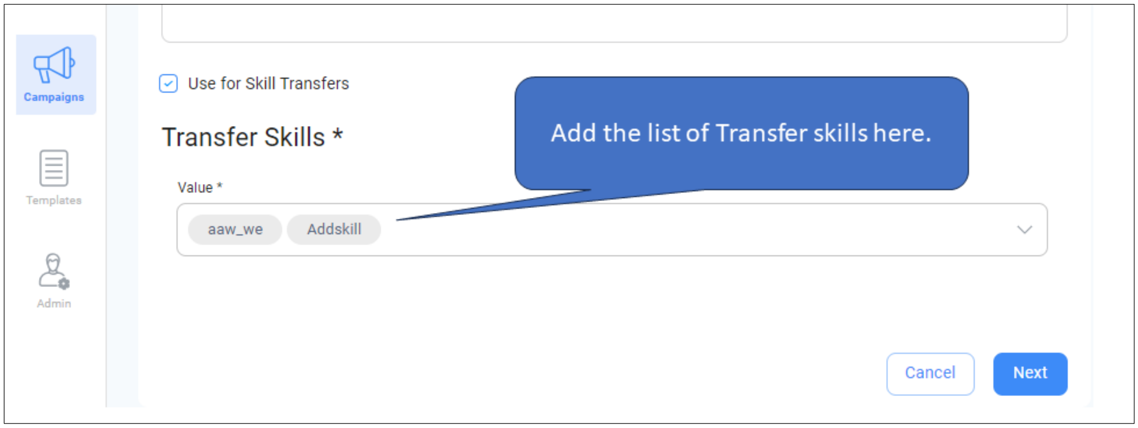
Skills allow administrators to categorize agents based on their specific expertise or capabilities. By defining skills, administrators can assign campaigns to specific groups of agents, ensuring that the right resources are being used for the right campaign.

In the Skills section, add the list of Skills available to the agent for this Campaign.

Use for Skill Transfers

Agents can perform a skill transfer internally. Admins can set up certain skills that are dedicated solely to skill transfers. This means that when an agent needs to transfer a call to another agent with a particular expertise, they can do so efficiently using these pre-configured skills.

- The **Use for Skill transfer** option in the Skills section allows you to configure specific skills exclusively for use during skill transfers from the agent toolbar. When agents initiate a skill transfer, they will only see the skills that have been pre-configured in the "Transfer Skill" field.



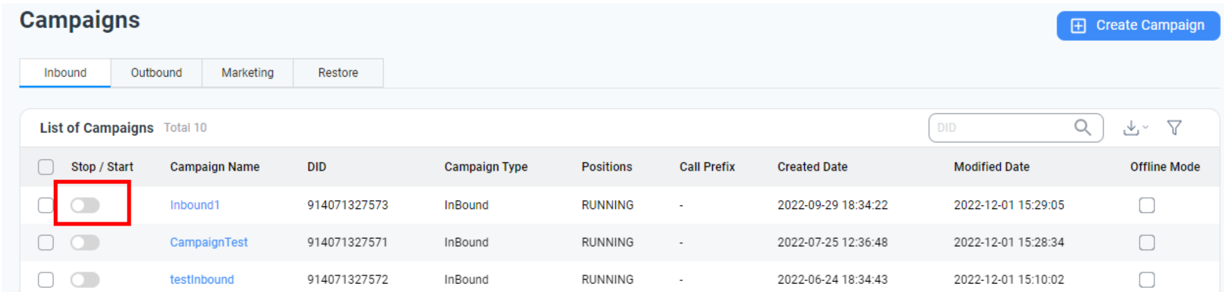
- This feature is available for all types of campaigns (except Chat campaigns).
- On the agent toolbar, the process remains unchanged. The “skill transfer” dropdown will still appear as skill but will be limited to the configured skills.

Script:

Here in the Script section, add a description of the campaign. This could be an overview of the campaign's purpose, goals, target audience, or any other relevant details, which could help the team members understand the campaign's key aspects

After filling in all the campaign information, Click **Save** to Commit the changes or **Cancel** to Discard the changes.

Once the Inbound Campaign is saved, Administrator has to click on the Start/Stop button to start the Inbound Campaign. When the campaign is first created, it is typically in a stopped state and must be manually started by an administrator. This allows the administrator to make any necessary adjustments or preparations before starting the campaign. See the below figure for an example.



Once the Administrator starts the Inbound Campaign, the position changes from “READY” to “RUNNING.” An administrator can stop the Inbound Campaign by clicking the same button.

Outbound Campaign

An outbound campaign is a proactive initiative where agents make outbound contacts to customers or prospects with a specific purpose or objective. Unlike inbound campaigns that focus on handling incoming interactions, outbound campaigns involve initiating outbound interactions through various channels such as phone calls, SMS, or social media messages.

Creating Outbound Campaigns

Follow the instructions below to create an Outbound campaign.

Click **Create Campaign** and choose the **Outbound Campaign** option to create a new outbound campaign.

The campaign information requires completion. The details for each field are outlined in the table below.

Basic Settings

Field	Description
Campaign Name (required)	The name of the Outbound Campaign
Campaign Type (required)	From the dropdown box, you can select ● Preview ● Progressive ● IVR ● Predictive
Sub Admin Assigned	List of the sub-admins who can access this campaign.
DID (required)	Telephony numbers are mapped to the account. In the drop-down, you see all

Field	Description
	the numbers that are mapped to the account, select any number from the list.
Dynamic DID	The dynamic DID field will display available numbers associated with the primary DID. You can select multiple numbers from the dynamic DID field for making customer calls. The system will automatically dial the selected numbers in a round-robin manner to optimize call distribution. To enable this feature, ensure that the admin setting "Dynamic DID for Campaign" is enabled in your admin settings (navigate to Admin > Settings > Admin settings). **Note**: A maximum of 100 DIDs can be shown in the dynamic DIDs field.
Fallback DID	The Fallback DID feature is used only in the event of primary trunk DID issues, such as trunk or server downtime. Users can choose a number from the list of configured fallback DIDs. **Note:** It's advisable to select a number from a different trunk associated with the primary DID for business continuity.
Dynamic Fallback DID	The Dynamic Fallback DID field displays numbers from the same trunk as of the Fallback DID number. Select multiple numbers for customer calls if the Primary DIDs are unavailable."
Dial method (required)	From the dropdown box, you can select ● AgentWise ● NonAgentWise ● Skill wise

General Information

Field	Description
URL to Push	This URL is to send callback details
Hit ScreenPop URl at	**1. Client-side:** If this is configured, the CallerNumber/CampaignName/SkillName is passed to the Agent browser side, so that the data appears as an IFrame. **2. Server Side:** The CallerDetails are passed to the CRM Server if this is configured. The data is captured in CRM Access logs. This is typically used by Agents/clients who are not logged into the browser but can still access CRM data. Generally used in Offline Campaigns which allow the data to be accessed by CRM, during the call. **3. Client-side on Busy:** This is similar to #1, but, CLOUDAGENT sends the ScreenPop only when Agent becomes BUSY. (i.e., only when he is ON

Field	Description
	CALL). So, the IFrame on Agent Screen is opened only when the Agent is on Call. i.e., the Client is BUSY. **4. Client and Server:** CLOUDAGENT hits the ScreenPop URL to both the Client Side & Server side of CRM. IFrame is also opened and Access logs of CRM will get the data in the backend, #1 & #2. **5. Plugin:** This is used for the integration of ZOHO CRM. At this point, we use the ScreenPop URL field = ZOHO.
ScreenPopURL	This is the URL provided by the CRM vendor to fetch the data from the CRM system and show it as an IFrame on the Agent screen. IFrame is the popup window that appears in the lower half of the Agent screen.
Call Prefix	Caller IDs prefix code (Ex: +91, 0, ..)
Disposition Type (required)	These options refer to different ways that a disposition, or outcome, can be assigned to a call. **1. None**: If the option is selected no disposition is tagged to the call. **2. API:** This option means that the disposition will be assigned through an application programming interface (API). **3. Toolbar:** This option is widely used. If this option is selected a pop-up will be opened to fill the call summary.
Dispositions (required)	List of disposition codes available to the agent for this Campaign.
Wrapup Time	This is the time in seconds available to the Agent for after-call work. Value 0(zero) means an infinite time for the Agent.
No. of Tries (required)	Number of times, a given record will be attempted. Refer the 'Advanced Re-Tries' section in the page below for more details.
ACW for UnAnswered Calls	Check this box if you want the Agent to wrap up unanswered calls. With this box checked, Agents will go in ACW State even for UnAnswered calls. By default, this box is unchecked.
Block Number	This is specific to a campaign. Tells whether to consider the blocked call list or not.
Block Number Group	Name of the blocked numbers group that is created.
Daily Outbound	Specify the numerical value to set the maximum daily outbound dialing

Field	Description
Limit per Number	attempts for a number within the campaign.
RunTime (required)	Run time of the campaign.
Priority (required)	This is the priority of the campaign. Useful when a particular agent is involved in multiple campaigns.
Play Disclaimer URL	You can add an audio file that will play to the customer as a disclaimer as soon as they answer the call. The file can be in .mp3 or .wav format.
Dial Interval	Time interval gap at which the next record is dialed.
Customer Ringing Time (required)	Ringing time of the call to the customer.
Mapping Name (required)	This field is used to add the headers from an Excel sheet. These headers will be displayed on the agent's screen. You can utilize the provided sample file for upload. The sheet exclusively includes header names, which should be added in Column A. Both **.xlsx** and **.csv** formats are supported for uploading the data. "PhoneNumber" is mandatory, and the headers include: - PhoneNumber - Name - AgentId - Skill - Priority - CustomFields1 - CustomFields2 - CustomFields3
Upload File	Use this field to upload the data corresponding to the mapping file uploaded in the previous step. Ensure that the file is in Excel format. Add the data directly in rows corresponding to the mapping file. Headers do not need to be included here as they have already been defined in the mapping file. **Valid phone number formats:** 040-3056 6821 +(91)-(040)-30566822 +(91)-(40)- 30566816 04030566823 914030566825 91 40 30566820 040 3056 6828 +(91)-9989129797,

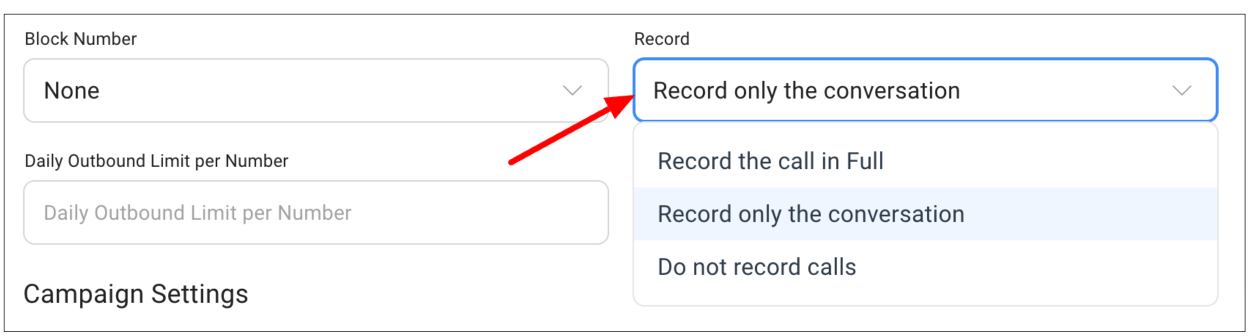
Field	Description
	91-9908727236 +919490607378 09866008580 919703331632 91 9985392390 9948739989 **Supported special characters in the "Name" field:** 1. (2.) 3. [4.] 5. Dot (.) 6. - 7. $ 8. - 9. : (Colon) 10. / (Forward slash) 11. Backward slash Any entry added to the **Name** field here will be displayed in the **UUI** field of the **Call Details report**.
Music Files	1. On Hold 2. On Transfer

Call Recording

Record settings for outbound calls provide additional options for customizing how calls are recorded, catering specifically to Preview, Progressive, and Manual campaigns. Admin can configure recording preferences to include one of three options:

1. **Record the call in Full:** Records the entire call, including the ringing tone and the conversation.
2. **Record only the conversation:** Records only the conversation portion of the call, starting when the agent and customer are connected.
3. **Do not record outbound calls:** No recording is done for outbound calls.

Note: This feature supports calls made from Agent Manual Dial API as well.



Advanced Re-Tries

The advanced retries feature enables administrators to set up various retry attempts based on call statuses & dispositions. Please be aware that this option is accessible solely while editing campaigns.

Now, let's delve into the fields related to the retry configuration functionality.

1. ***Retry Configuration***

Field	Description
Max No. of tries per Day	Use this field to set the maximum number of retry attempts allowed in a single day.
Max No. of Days to Retry	Specify the duration or the maximum number of days within which retry attempts will be made.

Prioritize Schedule Retries: Priority will be given to contacts that haven't been reached, and they will be the first to be attempted after the scheduled retry attempts.

2. ***Retry Conditions***

The retry conditions lets you decide when to retry based on call outcomes. You can easily manage them using "OR" and "AND" operators.

OR Logic: With "OR," a retry happens if either the call status or disposition matches the given condition.

AND Logic: With "AND," a retry only occurs when both the call status and disposition match the given condition.

Specify retry intervals for each scenario, determining the number of retry attempts and intervals to align with your campaign's requirements.

Campaign settings

- **Recent First:** When enabled, this setting prioritizes recently added phone numbers, ensuring they are dialed first by the system.
- **STD Enabled:** When this feature is active, the system automatically dials the numbers with a prefixed 0 (zero) added before the 10-digit phone numbers available in the campaign list.
- **DND Mode:** "DND" stands for "Do Not Disturb" mode. The DND feature allows agents to make calls to customers who are in the DND mode.
- **ACW for Unanswered Call:** Check this box if you want the Agent to wrap up Un-Answered calls. With this box checked, Agents will go to ACW State even for unanswered calls. By default, this box is unchecked.
- **Dial Customer First:** With this feature enabled, the system prioritizes dialing the customer first. If the customer answers the call, the system then proceeds to connect them with an available agent.
- **Allow Manual Dialing:** This feature allows the agents to make manual calls.
- **Apply DNC Regulation:** This feature enables the monitoring of customers' time zones to determine the appropriate calling times for each customer. This ensures that customers are contacted at suitable hours, respecting their local time and adhering to DNC regulations. (Refer Inbound Campaigns to configure the same for inbound campaigns)

- **Apply DID masking:** This feature enables the masking of DID (Direct Inward Dialing) numbers - providing an enhanced level of privacy and security.

Skills:

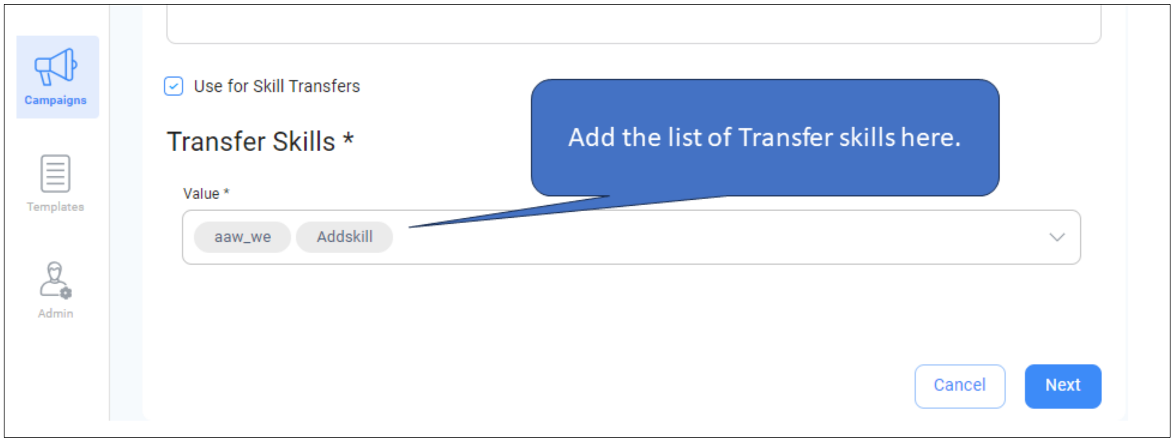
Skills enable administrators to categorize agents according to their unique expertise and capabilities. By defining these skills, administrators can allocate campaigns to particular agent groups, guaranteeing optimal resource utilization for each campaign.

Within the 'Skills' section, you can input the list of available skills for agents involved in this specific campaign.

Use for Skill Transfers

Agents can perform a skill transfer internally. Admins can set up certain skills that are dedicated solely to skill transfers. This means that when an agent needs to transfer a call to another agent with a particular expertise, they can do so efficiently using these pre-configured skills.

- The **Use for Skill transfer** option in the Skills section allows you to configure specific skills exclusively for use during skill transfers from the agent toolbar. When agents initiate a skill transfer, they will only see the skills that have been pre-configured in the "Transfer Skill" field.



- This feature is available for all types of campaigns (except Chat campaigns).
- On the agent toolbar, the process remains unchanged. The “skill transfer” dropdown will still appear as skill but will be limited to the configured skills.

Script:

Within the Script section, include a campaign description that provides an overview of its objectives, purpose, target audience, and other pertinent information to enhance team understanding of the campaign's essential elements.

Once all campaign details have been entered, select '**Save**' to commit the changes or '**Cancel**' to discard any modifications.

Advanced Retries

The advanced retries feature allows admins to configure retry attempts based on the selected disposition values during campaign editing. Please note that the advanced retries option is available only when editing a campaign.

Within the retries configuration setting, users can create multiple retry scenarios by combining call statuses and dispositions.

Let's explore the fields involved in the retry configuration functionality.

Retry Configuration

Field	Description
Max No. of tries per Day	This field allows you to define the maximum number of retry attempts that can be made in a single day.
Max No. of Days to Retry	In this field, you can specify the duration, or the maximum number of days, during which retry attempts will be made.

Prioritize Schedule Retries: Contacts that have not yet been reached will be given priority and attempted first after the scheduled retries.

Retry Conditions

Within this section, you can establish multiple retry conditions, often referred to as cases (e.g., Case 1, Case 2, etc.). Each case allows you to define specific combinations of call statuses and dispositions. You have the flexibility to manage these conditions using logical operators, namely "OR" and "AND."

OR Logic: When you choose the "OR" option, the system will initiate a retry based on either the call status field or the disposition field. This means that if any of the specified conditions are met (either the call status or disposition matches), the system will trigger a retry.

AND Logic: Selecting the "AND" option signifies that the system will initiate a retry only when both the call status and disposition fields satisfy the specified conditions. In this configuration, for a retry to be executed, both sets of criteria must concur. For instance, if the call status field is designated as 'unanswered' and the disposition field is set to 'XYZ', the system will attempt a retry only when the call remains unanswered, and its disposition corresponds to 'XYZ'.

This way of control enables you to optimize your contact center's efficiency and adapt your retry strategies to the unique needs of your campaigns.

For each case, you are required to specify the time intervals for retry attempts after each call. It's essential to calculate the number of retry attempts you intend to make and set the time intervals accordingly. This ensures that the retry schedule aligns with your campaign's requirements.

IVR Campaign

An IVR-based campaign refers to a marketing or communication initiative that utilizes Interactive Voice Response (IVR) technology to interact with customers. IVR is an automated telephony system that allows callers to interact with pre-recorded voice prompts or touch-tone keypad entries.

Creating IVR-Based Campaign

Click **Create Campaign** and then choose **Outbound Campaign** to create the new outbound IVR-based campaign.

Fill in all the campaign information needed in the fields. The description of each field is explained in the following tables.

Outbound IVR Campaign General Fields

Basic Settings

Field	Description
Campaign Name (required)	The name of the Outbound Campaign.
Campaign Type (required)	IVR
Sub Admin Assigned	List of the sub-admins who can access this campaign.
DID (required)	Telephony number mapped to the Inbound Campaign.
IVR Flow (required)	Select the IVR flow needed for the campaign from the dropdown.
Max Concurrent Calls (required)	The maximum number of active calls allowed for that campaign.
Fallback DID	Add the fallback DID if any, the call will be redirected to this backup number if the primary phone number experiences technical difficulties.

General Information

Field	Description
URL to Push	This URL is to send callback details
Hit ScreenPop URl at	**1. Client-side**: If this is configured, the Caller Number / Campaign Name / Skill Name is passed to the Agent browser side so that the data appears as an IFrame. **2. Server Side:** The caller details are passed to the CRM Server if this is configured. The data is captured in CRM access logs. This is typically used by Agents / Clients who are not logged into the browser but can still access CRM data. Generally used in Offline Campaigns which allow the data to be accessed by CRM, during the call. **3. Client-side On Busy**: This is similar to Client-Side, but, CloudAgent sends the ScreenPop only when the agent becomes BUSY. (i.e., only when he is On Call). So, the IFrame on the agent screen is opened only when the agent is on Call. i.e., the Client is BUSY. **4. Client and Server:** CloudAgent hits the ScreenPop URL to both the Client Side & Server side of CRM. IFrame is also opened and Access logs of CRM will get the data in the backend, #1 & #2.**** **5. Plugin:** This is used for the integration of ZOHO CRM. At this point, we use the ScreenPop URL field = ZOHO.

Field	Description
ScreenPopURL	This is the URL provided by the CRM vendor to fetch the data from the CRM system and show it as an IFrame on the agent screen. IFrame is the pop-up window that appears in the lower half of the agent screen.
Call Prefix	Caller IDs prefix code (Ex: +91, 0, ..)
Disposition Type (required)	These options refer to different ways that a disposition, or outcome, can be assigned to a call. 1. None: If this option is selected no disposition is tagged to the call. 2. API: This option indicates that the disposition will be assigned through an application programming interface (API). 3. Toolbar: This option is widely used. If this option is selected a pop-up will be opened to fill the call summary.
Dispositions (required)	List of disposition codes available to the agent for this Campaign.
Wrapup Time (In seconds)	This is the time in seconds available to the Agent for after-call work. Value 0(zero) means an infinite time for the Agent.
No. of Tries (required)	Number of times, a given record will be attempted.
ACW for UnAnswered Calls	Check this box if you want the Agent to wrap up unanswered calls. With this box checked, Agents will go in ACW State even for UnAnswered calls. By default, this box is unchecked.
Block Number	This is specific to a campaign. Tells whether to consider the blocked call list or not.
Block Number Group	Name of the blocked numbers group that is created.
RunTime (required)	Run time of the campaign.
Priority (required)	This is the priority of the campaign. Useful when a particular agent is involved in multiple campaigns.
Dial Interval	Time interval gap at which the next record is dialed.
Customer Ringing Time (required)	Ringing time of the call to the customer.
Mapping Name	This field is used to add the header file from your Excel sheet. Click "New” to

Field	Description
(required)	add a new Header or use an existing Header. This sheet contains only Headers/Column Names. "PhoneNumber" is mandatory. Column A and rows 1-4 are only to be used.
Upload File	Upload the file along with the header File. Upload file should be in Excel format only Valid phone number formats: 040-3056 6821, +(91)-(040)-30566822, +(91)-(40)- 30566816 04030566823, 914030566825, 91 40 30566820 040 3056 6828, +(91)-9989129797, 91-9908727236, +919490607378 09866008580, 919703331632, 91 9985392390, 9948739989
Music Files	1. On Hold 2. On Transfer

Campaign settings

- **Recent First:** When enabled, this setting prioritizes recently added phone numbers, ensuring they are dialed first by the system.
- **STD Enabled:** When this feature is active, the system automatically dials the numbers with a prefixed 0 (zero) added before the 10-digit phone numbers available in the campaign list.
- **ACW for Unanswered Call:** Check this box if you want the Agent to wrap up Un-Answered calls. With this box checked, Agents will go to ACW State even for unanswered calls. By default, this box is unchecked.
- **Dial Customer First:** With this feature enabled, the system prioritizes dialing the customer first. If the customer answers the call, the system then proceeds to connect them with an available agent.
- **Allow Manual Dialing:** This feature allows the agents to make manual calls.
- **Apply DID masking:** This feature enables the masking of DID (Direct Inward Dialing) numbers - providing an enhanced level of privacy and security.
- **Dial by holding agent:** In Progressive dialing, the system automatically dials customers one by one, placing the agent on hold until a customer answers. This seamless process saves time and boosts productivity, allowing agents to focus solely on live conversations.

Skills:

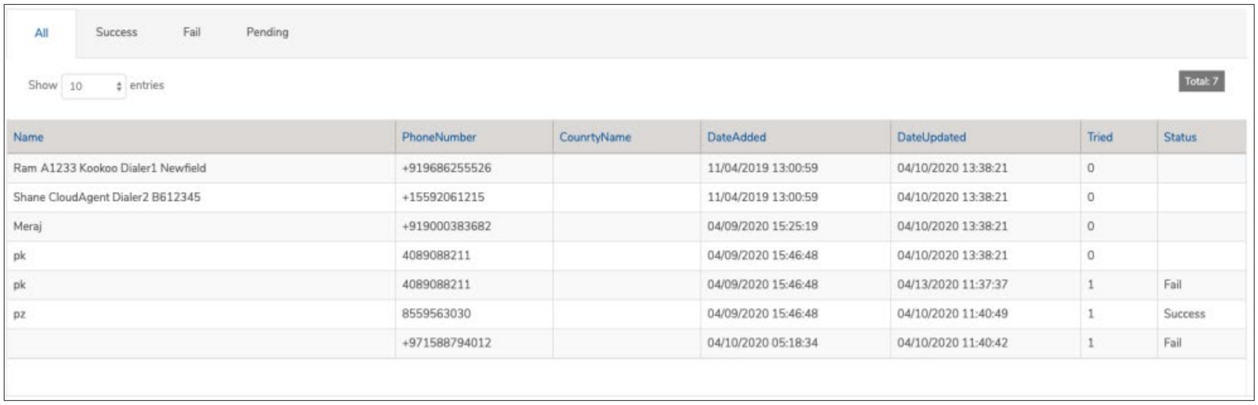
In the Skills section, add the list of Skills available to the agent for this Campaign.

Script:

Here in the Script section, add a description of the campaign.

After filling in all the campaign information, Click **Save** to Commit the changes or **Cancel** to Discard the changes.

Once the customer record is uploaded to the Campaign, the data will be displayed at the lower portion of the Administrator screen as shown in the following image.

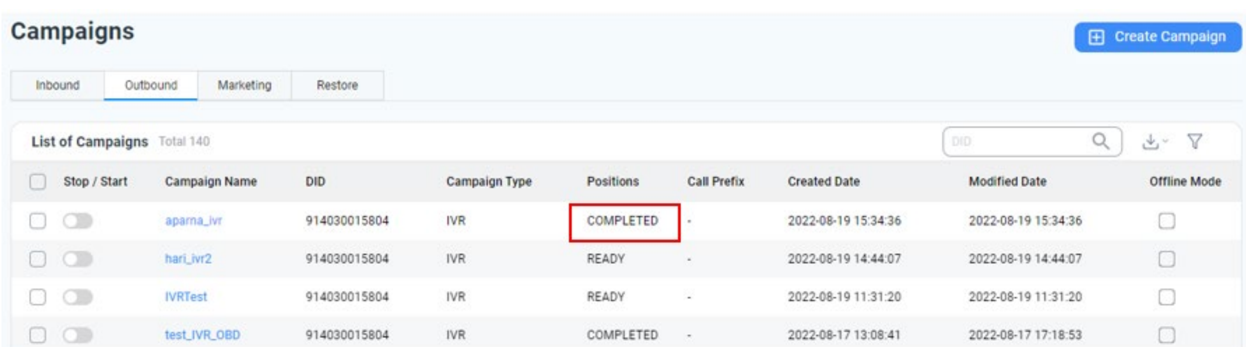


The following information will be available to the Administrators as shown in the below table.

Customer record data fields

Field	Description
DATA	**Name:** Name of the customer. **Phone Number:** Phone number of the customer. **Date Added:** The date on which the customer record was added. **Tried:** Number of times the record was tried. **Status:** Success/Failure result of dialing.
FAIL DATA	Records that were not successfully connected to the customer
SUCCESS DATA	Records that were successfully connected to the customer.
PENDING DATA	Records that are not dialed yet.

Once the IVR Campaign is completed, the position status of the Campaign will be marked as Completed as shown in the following image.



Chat Campaign

Explore the multitude of campaign options available to establish more personalized and effective connections with your customers. In this article, we'll delve into the creation of chat-based campaigns to enhance your customer engagement strategies.

Creating Chat-Based Campaigns

Chat-based campaigns are created so that customers can interact with CloudAgents via web-based chat. This option is enabled only on demand and is an additional option provided by ESI on request.

On the campaign page, select the **Inbound Campaign** option and click **Continue** to create a chat-based campaign.

Fill in all the required fields for the campaign. The below table explains all the fields to enter.

Chat-based Campaign General Fields

Field	Description
Campaign Name (required)	The name of the Chat Campaign.
Campaign Type	Chat
Sub Admin Assigned	List of the sub-admins who can access this campaign.
Campaign Identifier	Telephony number mapped to the campaign. This is the number that the customers dial for this Campaign.
Integrate	Select the integration options Facebook or Twitter, WhatsAPP as required.
Number of concurrent chats (required)	Specify the number of concurrent chats an agent can manage. The maximum permissible limit for simultaneous chats is 20.
URL to Push	This URL is to send callback details.
Hit ScreenPop URL at	1. **Client-side**: If this is configured, the CallerNumber/CampaignName/SkillName is passed to the Agent browser side, so that the data appears as an IFrame. 2. **Plugin:** This is used for the integration of ZOHO CRM. At this point, we use the ScreenPop URL field = ZOHO.
ScreenPopURL	This is the URL provided by the CRM vendor to fetch the data from the CRM system and show it as an IFrame on the agent screen. For detailed information on configuring the ScreenPopURL, refer to the Screen Pop Config article.
Disposition Type (required)	These options refer to different ways that a disposition, or outcome, can be assigned to a chat. 1. None: If the option is selected no disposition is tagged to the chat.

Field	Description
	2. Toolbar: This option is widely used. If this option is selected a pop-up will be opened to fill the chat summary.
Dispositions (required)	List of disposition codes available to the agent for this campaign.
Wrapup Time (In Seconds) (required)	This is the time in seconds available to the Agent to dispose the chat. Value 0(zero) means an infinite time for the Agent.
IVR Flow (required)	Select the IVR flow needed for the campaign from the dropdown.
Skills (required)	List of skills available to the agent for this campaign.
Save/Cancel	Save: Commit to the changes. Cancel: Discard the changes.

After filling in all the campaign information, Click **Save** to commit the changes or **Cancel** to discard the changes.

Restore a campaign

The "Restore" feature in the Campaign section allows you to retrieve deleted campaigns that were previously removed from the system. This feature is essential for data recovery and helps admins/supervisors avoid the permanent loss of valuable campaign data and settings.

Here's how the Restore feature typically works:

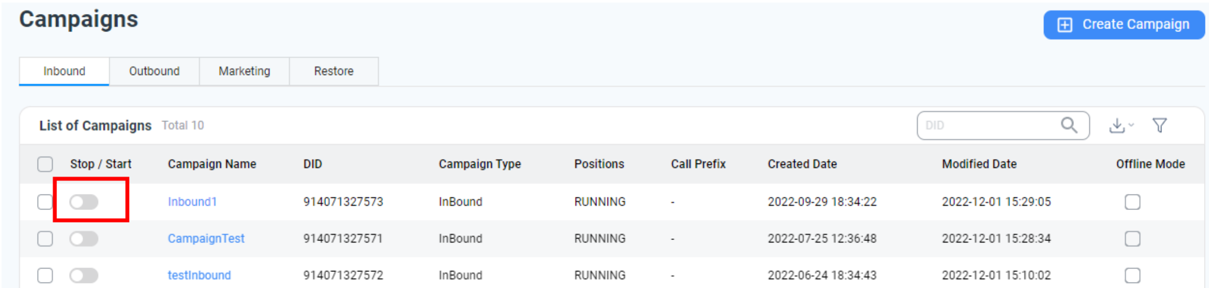
1. **Deleted Campaigns:** When the admin decides to remove a campaign from the system, the campaign is moved to a "Restore" section. It's not permanently deleted right away, providing a safety net in case the deletion was accidental or if the admin wants to refer back to the campaign later.
2. **Restore Option:** Within the "Restore" section, admins can find the list of campaigns that have been recently deleted. Each deleted campaign entry has a "Restore" button associated with it.
3. **Retrieval:** By clicking the "Restore" button for a specific campaign, the campaign will be moved back to its original location in the Campaign section. All campaign settings, data, and configurations will be reinstated.

The "Restore" feature provides a safety net for admins and prevents accidental data loss, which can be crucial in situations where there's a need to refer back to previous campaign data for analysis or reporting purposes.

Outbound campaign functions

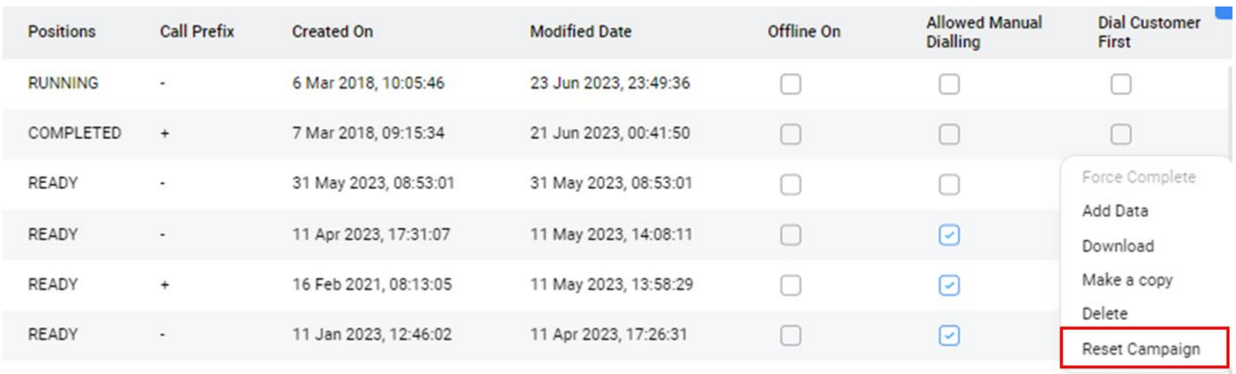
This article explains on the different functions of an outbound campaign and explores their various use cases.

If the campaign shows Ready Position, click on the Stop/Start button to start the Campaign. See the next image for an example. If the campaign is in the Running Position, click the same Start/Stop button to stop the campaign.

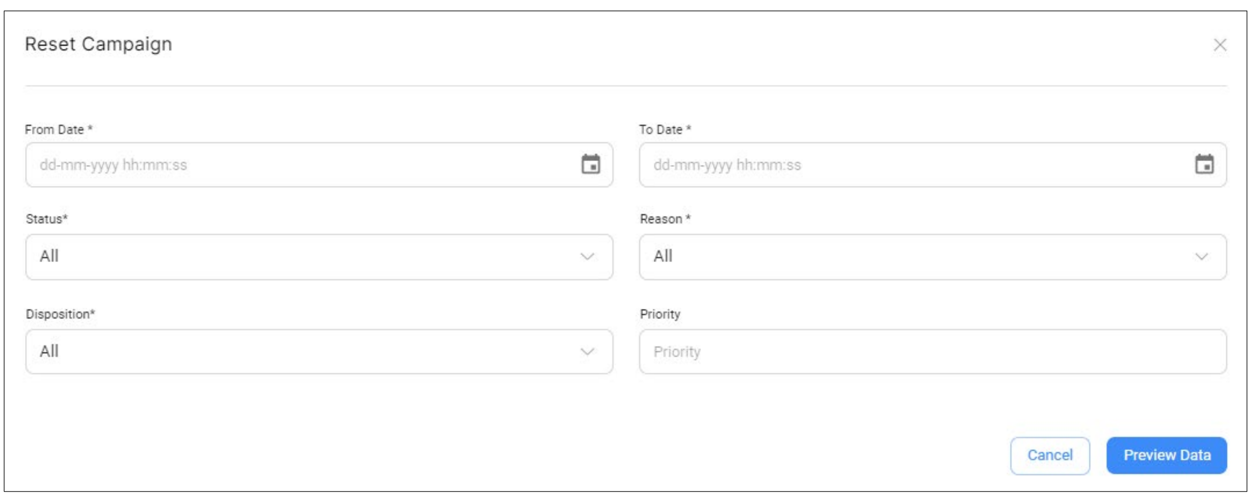


Reset

To reset a Campaign, the administrator must click on the Reset button and then confirm the action.



The below image shows the fields "From Date", "To Date", "Status", "Reason", "Dispositions", "Priority", "Agent", and "Skill" are used to filter the customer records for the Campaign reset. The administrator can select the desired values for these fields to reset specific customer records.



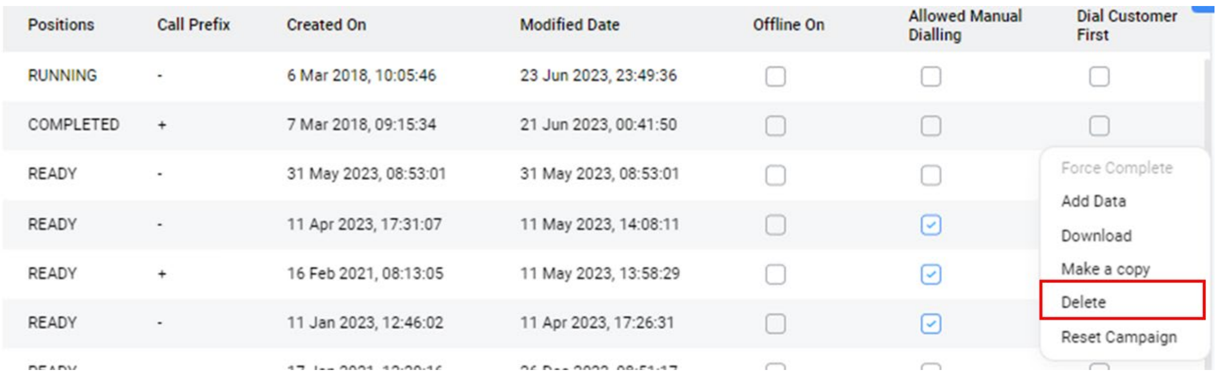
The reset function will clear the previous status of the customer records and make them available for redialing. This allows the Campaign to be run again with updated information and improved efficiency. The administrator will receive a notification message indicating the successful completion of the reset action on the Campaign. After resetting the Campaign, the position of the Campaign will change to Ready and Administrator can then start the Campaign.

Note:

Resetting a Campaign can only be done when the Campaign is in a Stopped or Completed state and not in a Running or Ready state.

Delete

The administrator also has an option to completely delete the records by clicking the Delete tab.

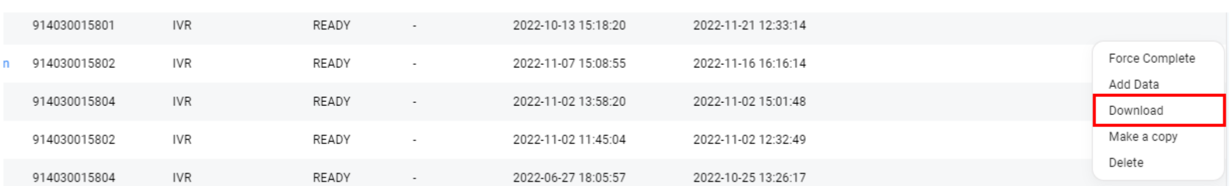


Positions	Call Prefix	Created On	Modified Date	Offline On	Allowed Manual Dialling	Dial Customer First
RUNNING	-	6 Mar 2018, 10:05:46	23 Jun 2023, 23:49:36	☐	☐	☐
COMPLETED	+	7 Mar 2018, 09:15:34	21 Jun 2023, 00:41:50	☐	☐	☐
READY	-	31 May 2023, 08:53:01	31 May 2023, 08:53:01	☐	☐	
READY	-	11 Apr 2023, 17:31:07	11 May 2023, 14:08:11	☐	☑	
READY	+	16 Feb 2021, 08:13:05	11 May 2023, 13:58:29	☐	☑	
READY	-	11 Jan 2023, 12:46:02	11 Apr 2023, 17:26:31	☐	☑	

When the administrator clicks on the "Delete" tab in the CLOUDAGENT interface, a warning message will appear to confirm the deletion. The message will ask the administrator to click on the "OK" button to confirm that they want to delete the selected records. Once the administrator confirms the deletion, the customer records will be permanently removed from the Campaign, and the administrator will have to upload new customer data if they want to include those records again. This is a precautionary measure to prevent accidental deletion of important data.

Download

Administrators can click on the Download button to download the data. The download option will be available in the Ready/Completed position.

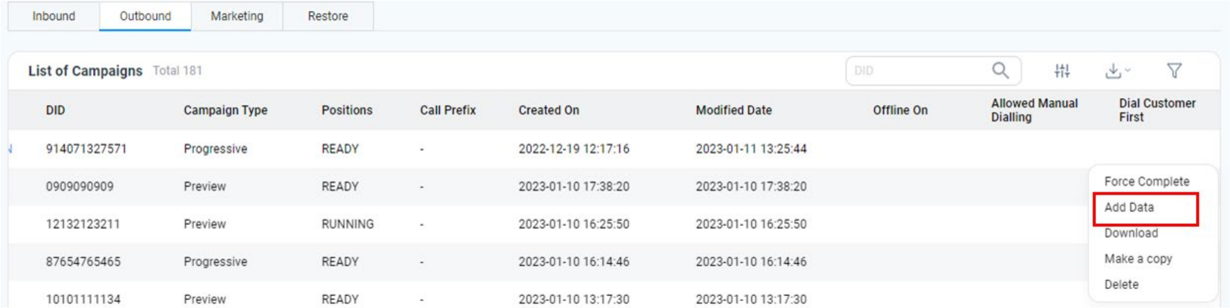


914030015801	IVR	READY	-	2022-10-13 15:18:20	2022-11-21 12:33:14
914030015802	IVR	READY	-	2022-11-07 15:08:55	2022-11-16 16:16:14
914030015804	IVR	READY	-	2022-11-02 13:58:20	2022-11-02 15:01:48
914030015802	IVR	READY	-	2022-11-02 11:45:04	2022-11-02 12:32:49
914030015804	IVR	READY	-	2022-06-27 18:05:57	2022-10-25 13:26:17

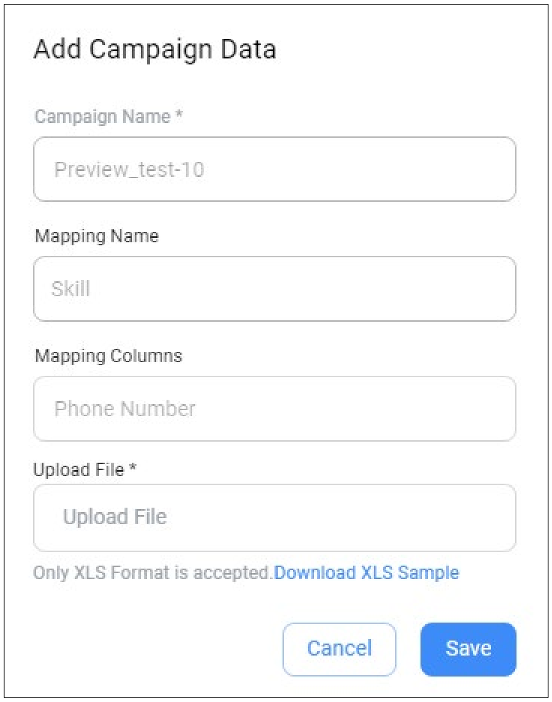
Once the Administrator clicks on the Download tab, a new window will open displaying the customer records. Administrators can then download and save the customer data in CSV, EXCEL, XML, or PDF format.

Add Data

Administrators can click on the Add Data option to upload the new customer records to the existing/new campaign.



The Add Data option will only be available in the Ready/Completed position of the Campaign. Clicking on the Add Data tab for a selected Campaign will open a new window. Administrators can upload the new/existing file stored on their desktop and click on the save button (See the below Image). The file to be uploaded is the Excel file created.

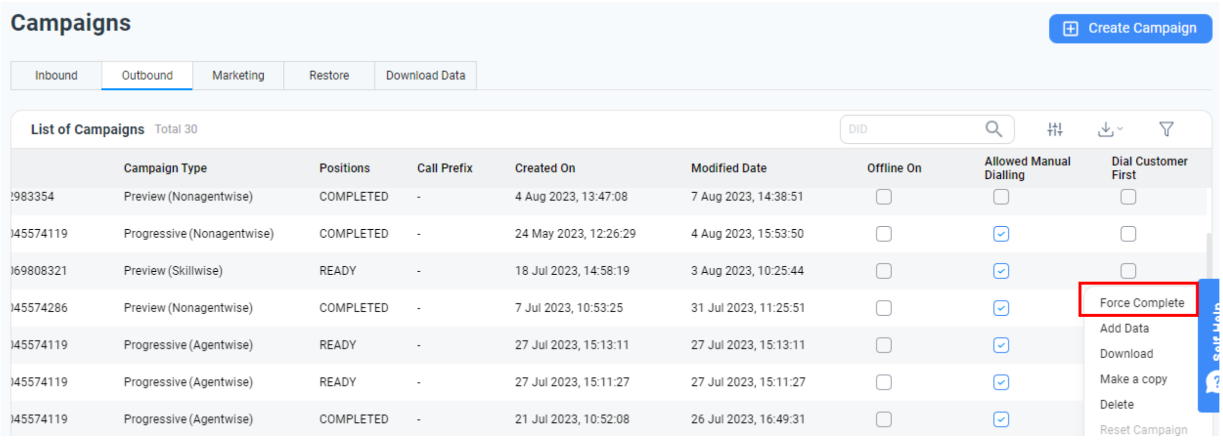


Note:

Add Data cannot be used while the campaign is in the Running Position.

Force Complete

Administrators can forcefully end the Campaign by clicking the Force Complete tab.



This marks all the active customer records (records that are still not dialed by the campaigns) as complete, and the position of the Campaign will change to complete. The Administrator will observe the message highlighted in the red box on the top of the screen once the Campaign is force completed.

Screen Pop Config

Screen Pop URLs are used to automatically display relevant information to agents when calls or interactions are received. This document provides information about setting up and configuring Screen Pop URLs.

Configuration Details

The following details are passed to the Screen Pop URL:

Key	Value
agentID	848
agentPhoneNumber	86 3
agentUniqueID	null
callerID	09 19
campaignID	25505
customer	credhas
dataID	21
did	91 2
monitorUcid	917 41
phoneName	agent1
skillName	0
type	Progressive
ucid	917 1
uui	Test

Screen Pop URL Example:

https://domain.com/ext/ESI/campaign/cxxxs?phoneNumber=094XXXXXX19&ucid=917XXXXXX41&callerID=094XXXXXX19&did=918XXXXXX22&skillName=0&agentUniqueID=null&dataID=210804769&campaignID=25505&monitorUcid=917XXXXXX041&phoneName=agent1&agentPhoneNumber=86XXXXXX43&type=Progressive&uui=Test&agentID=84822&customer=cxxxxxxs

When setting up a screen pop, admin should take the following settings into consideration.

Campaign Settings

When creating a campaign, consider the following settings:

- **Hit Screen Pop URL at:** Choose whether the screen pop URL should be triggered on the client or server side. For additional details on this setting, refer to the **"Generation Information"** section of the article.
- **Screen Pop URL:** This URL is provided by the CRM vendor to fetch data from the CRM system and display it as an IFrame on the agent's screen.

Agent Settings

To access the following settings navigate to **Admin -> Settings -> Agent settings**.

- **Add Data to Screen Pop:** Configure whether additional data should be included in the screen pop.

- **ScreenPop Send CallerID Param Only:** Determine whether only the CallerID parameter should be sent in the screen pop.
- **Don't Close Screen Popup:** Decide whether the screen popup should remain open after the interaction.

System Settings

To access the following settings navigate to **Admin -> Settings -> Admin settings -> Account -> System Settings**

Display CRM in

- Embed: This shows the Screen Pop inside a frame on the same page.
- Pop-up: This opens the Screen Pop in a new window.
- Open in New Tab: This opens the Screen Pop in a new tab.

Callback URL Config

A Callback URL in CloudAgent serves as a mechanism to transmit Call Summary Details following the conclusion of a call, in accordance with user-configured settings. Users can opt to request these details either immediately after each call or at 5-minute intervals, depending on their preferences set in the user settings.

Prerequisite

Users need to host the app publicly and ensure it's accessible to CloudAgent. This allows CloudAgent to successfully post the Call Summary Details to the specified URL in form data.

Configuration

Users can configure the Callback URL in two ways:

1. From the Campaign creation page.
2. In the account-level 'Admin Settings -> System Settings page.

However, it's important to note that the Callback URL configured in the Campaign page ("URL to Push" field) is always considered first, and the URL from the account-level page is taken into account only if no URL is configured in the Campaign page.

To access call summary details and sample curl request information for voice callbacks, please refer to the Voice Callback Details article.

For chat callback summary details and sample curl requests, kindly refer to the Chat Callback Details article.

To manage the Callback URL for both voice and chat interactions, admin can use the following settings:

Campaign Settings

- **URL to push:** This field is where you specify the callback URL to send callback details.

Admin Settings

- **Call back hit tries:** Used when we send “Call details” back to CRM. This helps when call records are not sent due to any network failure.
- **Send callback immediately:** This option is used when you want to transmit the "call details" instantly, without including the "Disposition." If this option isn't selected, there will be a 5-minute delay before the callback is sent, and it will include the Disposition information.

Agent Settings

- **Callback Alerts:** If an admin has enabled this setting, Chrome notification shows an alert 5 minutes before the callback.
- **Allow Agents to delete callback:** When this option is activated, agents are granted the capability to delete callbacks.
- **Allow agent to set callback timezone:** This allows the agent to set a callback as per the customer zone.

System Settings

- **Callback URL:** In the "Admin Settings" under the "System Settings" section, you will locate the "Callback URL" field. This field serves as a placeholder for the Callback URL.

Account Settings

- **Role_Callbacks:** The "Role_Callbacks" needs to be added to the account to access the Callback feature.

Voice Callback Details

Call Summary Details

CloudAgent provides the following call summary details after each call:

Parameter	Description	Return Type	Size	Example
AgentID	Agent Login ID	String	255	XXXXXX
AgentName	Name of the agent	String	255	XXXXXXX
AgentPhone Number	Phone number with which Agent is logged in	String	20	XXXXXXX
AgentStatus	Status of the Agent	String	50	answered / not_answered / NotDialed / user_disconnected
AgentUniqu eID	Unique Number assigned to the agent at the time of creation	BigInt	20	XXXXXXX
Apikey	Authentication key of the account	String	250	KKXXXXXXXXXXXX
AudioFile	Recording file of that particular call	String	500	http://recordings.xxx/xxx/xxx.mp3
CallDuration	Duration of that particular call	time	HH:MM:SS	00:01:20
CallerConfAudioFile	Recording file of conference call (if any)	String	500	http://xxxxx.xxx/xxx/xxx.mp3
CallerID	Customer Phone number	String	255	Customer’s Phone number

Parameter	Description	Return Type	Size	Example
CampaignN ame	Name of the campaign through which the call is routed	String	255	XXXXX_XXXXX
CampaignStatus	Whether the Campaign is ONLINE or OFFLINE	String	20	ONLINE / OFFLINE
Comments	Comments by agent (if any)	text	-	XXXXXXX
ConfDuration	Duration of the conference within the call	time	HH:MM:SS	00:00:00
CustomerStatus	Status whether the customer Answered or Unanswered the call	String	50	InvalidNumber / Congestion / answered / not_answered / NoRouteDestination / Dialing / NoResponse / ISDDisabled / ring / exception / SubcriberAbsent / InvalidNumberFormat /Busy
DialStatus	Telephony response of the call like Answered, UnAnswered, DND, etc.,	String	100	not_answered / answered / ring / invalid_number / exception
Dialed Number	Phone number connected to customer	String	20	XXXXXXX
dId	DID is the predefined number in a campaign through which the agent calls route.	String	30	91XXXXXXXXXX

Parameter	Description	Return Type	Size	Example
Disposition	Disposition set by the agent in ACW(after-call work) mode	String	100	xxxxx
Duration	Total call duration	time	HH:MM:SS	00:45:00
EndTime	Time at which the call ended	time	YYYY:MM:DD HH:MM:SS	2019-07-20 17:41:26
FallBackRule	Fallback rule configured at campaign level when call is not answered	String	255	Queue -> SkillXFR -> AgentDial
HangupBy	Call hang up from the customer or agent's end	String	100	UserHangup / Agent Hangup / SystemHangup
Location	Location defined in the skill	String	255	Hyderabad
monitorUCID	Unique caller ID used for monitoring call details	BigInt	20	43XXXXXXXX
PhoneName	Name configured to that particular agent Phone number	String	20	XXXXXXX
Skill	Skill through which the call is routed	String	255	XXXXXX
StartTime	Time at which the call started	Date Time	YYYY:MM:DD HH:MM:SS	2018-04-26 17:51:36
Status	Call status	String		Answered / NotAnswered

Parameter	Description	Return Type	Size	Example
TimeToAnswer	Time taken by the agent to answer the call	Time	HH:MM:SS	00:00:15
TransferType	Type of transfer agent initiated	String	30	Agent / Skill / Phone Number
Transferred To	Mode to which the call is transferred. Agent or Skill or Phone transfer.	String	30	agent_name / skillName / transfer_number
Type	Call type whether it is an Inbound, Manual, Preview, Progressive, etc.,	String	20	Progressive, Inbound, Manual, Preview, Mail, IVR, Chat, Predictive
UserName	Account name	String	50	XXXXXX
UUI	User to User call information	String	500	XXXXXX

Sample CURL Request, if it's a direct call between agent and costomer

curl -X POST http://yourdomain.com/callDetails -H 'content-type: application/x-www-form-urlencoded;’-F 'data=
{"AgentID":"xxxx","AgentName":"xxxx","AgentPhoneNumber":"xxxx","AgentStatus":"NotDialed","AgentUniqueID":"xxxx","Apikey":"xxxxx","AudioFile":"","CallDuration":"00:00:52","CallerConfAudioFile":"","CallerID":"xxxx","CampaignName":"xxxx","CampaignStatus":"ONLINE","Comments":"","ConfDuration":"00:00:00","CustomerStatus":"NormalUnspecified","DataUniqueId":"xxxx","DialStatus":"NormalUnspecified","DialedNumber":"xxxx","Did":"xxxx","Disposition":"","Duration":"00:00:00","EndTime":"2024-05-20 09:36:07","FallBackRule":"CustDial","HangupBy":"AgentHangup","HoldDuration":"00:00:00","Location":"xxx","PhoneName":"xxxx","Skill":"xxxx","StartTime":"2024-05-20 09:35:15","Status":"NotAnswered","TimeToAnswer":"","TransferType":"No Transfers","TransferredTo":"","Type":"Predictive","UUI":"xxxx","UserName":"xxxx","WrapUpDuration":"00:00:00","monitorUCID":"xxxxxx"}

For conference calls, the sample request is as follows:

curl -X POST http://yourdomain.com/callDetails -H 'content-type: application/x-www-form-urlencoded;’-F 'data=
[{"CallID":"xxxxxxx","UCID":"xxxxxxxx","CreatorAgentId":xxxx,"CreatorAgentName":xxxx,"CreatorPhoneNo":"xxxxxxx","ParticipantAgentId":xxxx,"ParticipantAgentName":xxxxx,"CreatorAgentPhoneNo":"xxxxxxx","CreatorPhoneName":"xxxxxx","ParticipantPhoneNo":"xxxxxxx","ParticipantAgentPhoneNo":xxxx,"Pa

rticipantPhoneName":xxxx,"ConfStartTime":"YEAR-MM-DD HH:MM:SS","ConfPickupTime":"YEAR-MM-DD HH:MM:SS","ConfEndTime":"YEAR-MM-DD HH:MM:SS","ConfUCID":"xxxxxxxx","DID":"xxxxxxxx"}]

To receive callbacks for conference calls, ensure that the super admin setting "Conference CallBacks" is enabled.

For conference call, sample request in the case of 'AdvancedCallBacks'

curl -X POST http://yourdomain.com/callDetails -H 'content-type: application/x-www-form-urlencoded;'-F
'data=[{"AgentID":"xxxx","AgentName":"xxxx","AgentPhoneNumber":"xxxxx","AgentStatus":"answered","AgentUniqueID":5,"Apikey":"xxxxxx","AudioFile":"","CallDuration":"00:01:05","CallID":xxxxx,"CallerConfAudioFile":"","CallerID":"xxxx","CampaignName":"test","CampaignStatus":"ONLINE","Comments":"","ConfDuration":"00:00:00","CustomerStatus":"answered","DID":"xxxx","DataUniqueId":"","DialStatus":"answered","DialedNumber":"xxxx","Disposition":"xxxx","Duration":"00:01:27","EndTime":"2024-04-19 15:13:08","FallBackRule":"AgentDial","HangupBy":"AgentHangup","HoldDuration":"00:00:00","Location":"","PhoneName":"xxxx","Skill":"","StartTime":"2024-04-19 15:11:41","Status":"Answered","TimeToAnswer":"00:00:22","TransferType":"No Transfers","TransferredTo":"","Type":"Manual","UCID":xxxx,"UUI":"","UserName":"xxxx","WrapUpDuration":"00:00:05"},{"AgentName":"xxx","Audio":null,"CallID":xxxxxx,"DID":"xxxx","DialStatus":"SUCCESS","EndTime":null,"ExitStatus":"xxxx","ParticipantNumber":"xxxx","PickupTime":"2024-04-19 15:12:54","StartTime":"2024-04-19 15:12:53","UCID":xxxx}]

To receive the advanced callbacks, ensure that the super admin setting "AdvancedCallBacks" is enabled.

Chat Callback Details

This article provides details on the configuration of WhatsApp and Webchat URLs as part of a campaign creation. These serve the purpose of automatically presenting agents with relevant information when they receive chat interactions.

Configuration Details

The following parameters are passed in the Whatsapp and Webchat callback URLs.

Parameter	Description	Return Type	Size
monitorUCID	Unique caller ID used for monitoring chat details	BigInt	20
UUI	User to User chat information	String	500
CamapignName	Name of the campaign through which the chat is routed	String	255
CallerId	Customer Phone number	String	255
Skill	Skill through which the chat is routed	String	255

Parameter	Description	Return Type	Size
StartTime	Time at which the chat has started	Date Time	YYYY-MM-DD HH:MM:SS
EndTime	Time at which the chat has ended	Date Time	YYYY-MM-DD HH:MM:SS
Node	Flow of a particular chat interaction		
Duration	Duration of a particular call	time	HH:MM:SS
AgentUniqueID	Unique Number assigned to the agent at the time of creation	BigInt	20
AgentName	Name of the agent	String	255
AgentID	Agent Login ID	String	255
Transcript	Message to be sent in the chat	String	
Disposition	Disposition set by agent in ACW(after call work) mode	String	100
EndBy	Chat ended from customer or agent end	String	100
CustomerName	Name of the customer	String	255
CustomerMail	Mail id of the customer	String	255
DID	DID is a predefined number in camp through which Agent chats route.	String	30

Example for WhatsApp and WebChat Data URL

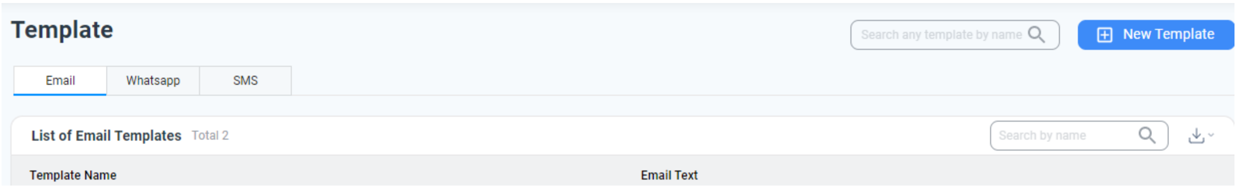

```
{
'monitorUCID': 'XXXXXXXXXXXXX',
'UUI': 'Sticky-RiyaA',
'CampaignName': 'whatsapp_chat',
'CallerID': '+XX30XXXXX28XX09',
'Skill': 'whatsapp',
'StartTime': '2023-07-25 08:27:57',
'EndTime': '2023-07-25 08:29:44',
'Node': 'NEXT_FREE_AGENT -> NEXT_FREE_AGENT -> AGENT -> AGENT',
'Duration': '00:01:47',
'AgentUniqueID': '38182',
'AgentName': 'RXXXXXA',
'AgentID': 'RXXXXXA',
```

'Transcript': '[{"agent":"false","ts":"1690253877698","msg":"Hi RiyaA . Grateful if you could reply to my message above. Thank you.","type":"Text"},{"agent":"true","ts":"1690253961578","msg":"Dear guest, transferring\n your message to the support team.","type":"text","agentId":"RiyaA"}]',
'Disposition': 'Support',
'EndBy': 'Agent',
'Comments': '',
'Apikey': 'KKXXXXXXXX10XXXXXf',
'CustomerName': '',
'CustomerMail': '',
'UserName': 'XXXXXXXX',
'DID': 'XXXXXXXXXX'
}

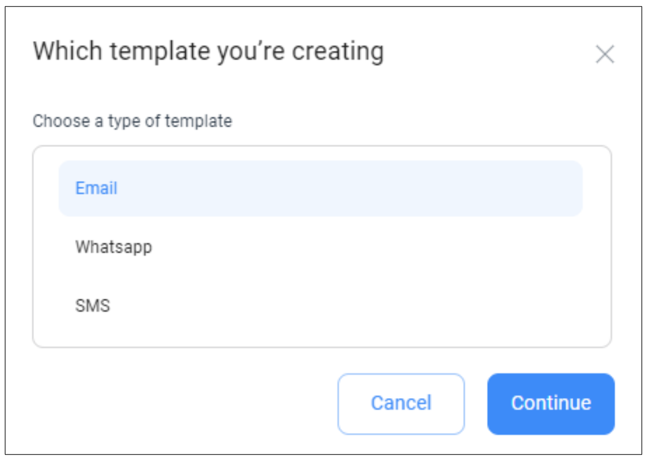
Templates

The templates tab provides options to create email, WhatsApp, and SMS templates, allowing frequently used messages to be saved and easily sent without retyping.

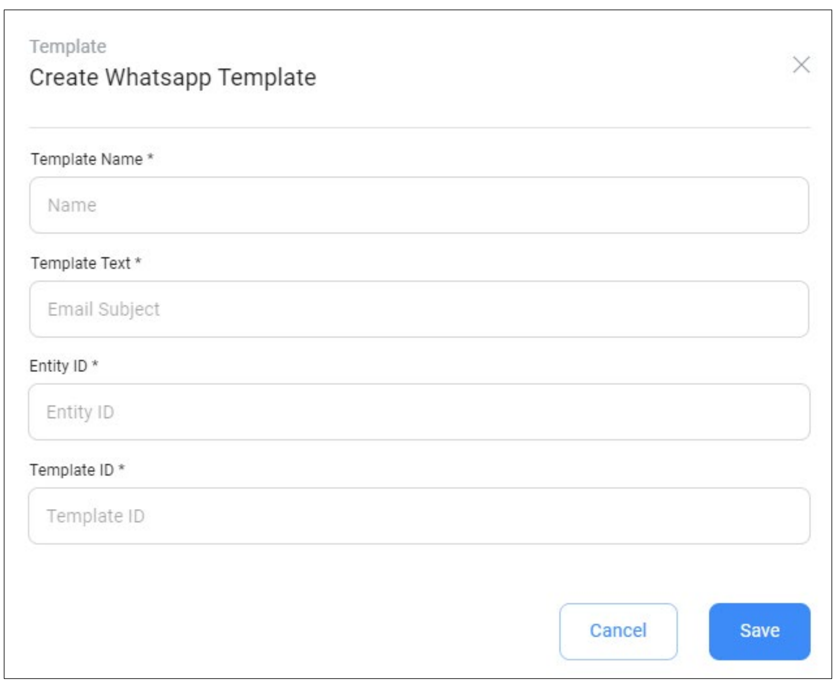
To create a new template, refer to the follow the instructions provided below.



Click on the **"+ New Template"** button and select the type of template (Email, WhatsApp, or SMS) that you want to create.



Once you have selected the type of template, click on **"Continue"** and fill out all the necessary fields.



Template fields and descriptions

Field	Description
Template Name*	Name of the template that you like to give
Template Text*	Type the text message for your template
Entity ID*	Specific to the Indian users. Provided by vendor
Template ID*	Specific to the Indian users. Provided by vendor

Profiles

User Profile

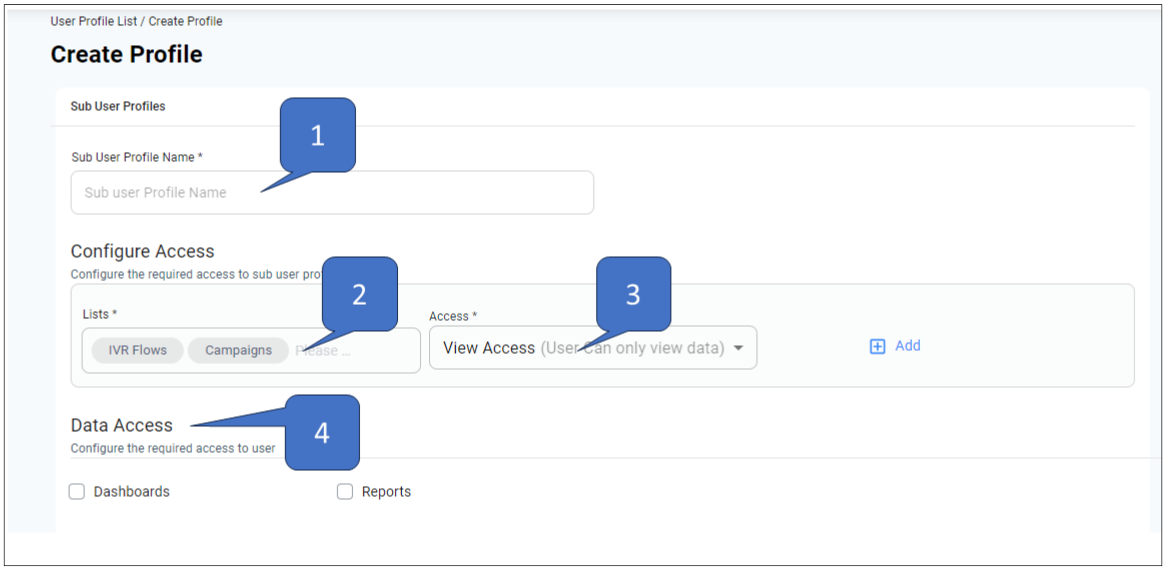
Introduction

CloudAgent offers potent user management features, including the creation of Sub-Admins and control over their access permissions. Admins can create new users and assign them specific access rights to CloudAgent functionalities, ensuring that only authorized personnel can perform certain tasks within the contact center environment.

Creating a user profile

To create a Sub-Admin or sub-user, you first need to set up a User Profile. Follow these steps to create one:

1. **Navigate to:** Admin -> People -> User Profile
2. **Add a New Profile:** Click on "Add Profile" to start creating a new user profile.
3. **Complete the User Profile Form:**
    i. **Profile Name:** Assign a name to the sub-user profile.
    ii. **Configure Access:** Select the required modules and specify the access levels for the sub-user. Modules might include Agents, Skills, IVR Flows, etc. Access levels are:
        a. View Access (gives read-only access to all system aspects)
        b. Edit Access (gives edit (but no-delete) access to all system aspects)
        c. Full Access (gives full access to all system aspects)
        d. Data Upload Access (gives access to upload data into a campaign only*)
    iii. **Data Access**: Choose whether the sub-user can access Dashboards, Reports, or both, depending on your preferences.



4. **Save the Profile:** After filling in all the necessary fields and configuring access, save the profile.

This process will create a user profile that can be assigned to sub-users, giving them the appropriate permissions and access within CloudAgent.

Sub-User

This guide will help you create a Sub-User for your account. Before you begin, ensure you have already created a User Profile. As an admin, you can assign specific permissions to each sub-user based on their roles and responsibilities. You can control which campaigns and agent list items the Sub-User can access in their respective login.

Note:

Sub-Admins are now referred to as 'Sub Users'.

Sub-User Creation

Follow these steps to create a Sub-User:

1. **Navigate to:** Admin -> People -> Sub Users.
2. **Add a New User:** Click on the "Add User" button to create a new Sub-User.
3. **Fill out the Required Fields:**
    i. Provide the necessary details:
        a. Sub Username
        b. First Name
        c. Last Name
        d. Email
    ii. **Choose a Sub-User Profile:**From the drop-down menu, choose the Sub-User Profile you have already created. This will open the **Configuration Access** section.
        a. **Configuration Access:** Select the campaigns and agent lists that the Sub-User should have access to.
    iii. Set a password for the user. Refer to the **Password Policy** section below for password requirements.
4. **Save the Configuration:** Once all the details are entered, save the Sub-User configuration.

Password Policy

Adhere to the following mandatory parameters, when setting a new password:

1. The new password should not match any of the last 4 passwords used.
2. The password must not contain spaces.
3. It should be between 7 to 50 characters and include at least one uppercase letter, one lowercase letter, and alphanumeric characters.
4. The password must differ from the user ID.
5. Avoid using control characters and non-printing characters.
6. Passwords should be updated every 90 days.

Sub User Creation Limit

Note:

By default, 15 sub-admins can be created which can be edited in the Admin settings -> Sub User Creation Limit

UseCase

- If the sub-admin creation limit is "50"
- Let's assume 50 people are added to the system
- Now, 5 have been disabled & 45 are enabled
- So now new 5 more sub-admins are added into the system & enabled
- Now, it is not possible to enable the old 5 people (who have already been disabled) since 5 new were added & enabled in the system (as the limit matches 50 already).

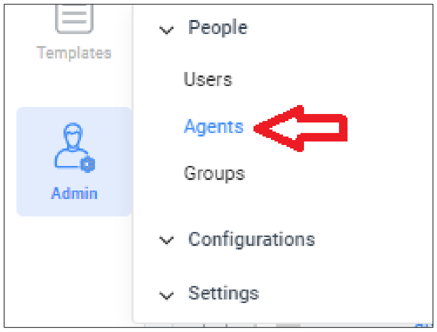
Agents

Introduction

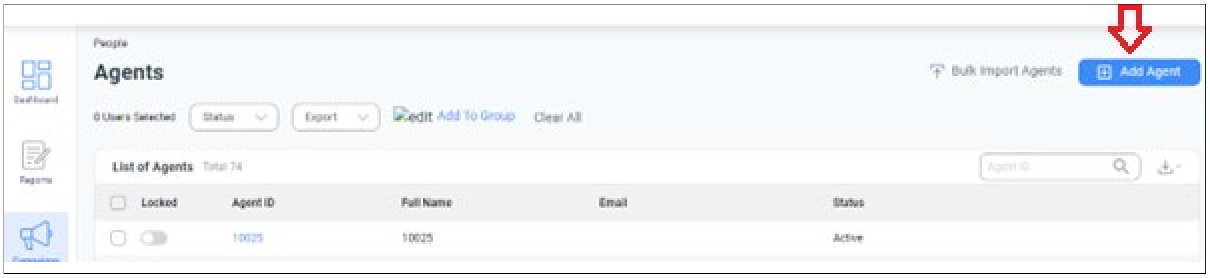
As an admin, one of your primary tasks is to create agents and assign them appropriate permissions. The People options provide you with a range of functionalities to create, edit, and monitor agents, as well as assign specific roles and permissions. This guide will walk you through the steps to effectively create and manage agents within the CloudAgent platform.

Adding a new agent

- Login to the CloudAgent portal as an Admin.
- Click on Agents under People in the Admin tab as shown below.



- On the Agents window, click on the 'Add Agent' button to create new agents as shown below.



- Add the fields to create an agent which are explained below.

Field	Description
Agent ID*	The name by which the Agent is to be mapped on the portal
Agent Name*	Can be the same as the Agent ID if required
Email *	Provide the email ID
Password*	Password can be any alphanumeric character
Agent Data	Additional Information on the Agent
Please Select Agent Modes*	One mode needs to be selected. **Inbound:** Inbound call only **Manual:** Outbound call **Preview:** Outbound call with preview options to view customer numbers that are dialed by the system **Progressive:** Outbound calls that are dialed sequentially by the system **Blended:** Agent who can handle both Inbound and Outbound calls **Digital:** Agents can handle all texting channels like web chat, SMS, WhatsApp, etc.
Auto answer SIP calls	This option allows you to set for each agent whether they should auto-answer calls. The options are: **None:**All calls have to be manually answered **Inbound:** Inbound calls are auto answered but for outbound calls (dialer calls), the agent will have to click and answer **Outbound:** All dialer calls will be in auto answer while the Agent will have to click and answer the Inbound calls **All:** All types of calls will be in auto-answer mode **NOTE:** Manual dialing calls will always be in auto-answer mode
Priority*	Agent priority is based on skill level as to whom the inbound call should land first. Priority 1 is the highest.
Add Groups	Use this field to assign an agent to the available groups within the account.
Skills (Level of priority skill-wise)	This option allows agents to be in different priorities in different skills. 1 is the highest priority (Calls are offered first for this priority) and 9 is the lowest for an agent.

Note:

- The fields with '*' are mandatory fields
- To be fully operational, an agent must be linked to a Skill group.

Call Controller Settings

As an admin, you can customize the call control options visible to the agent. Choose from the following list of available controls:

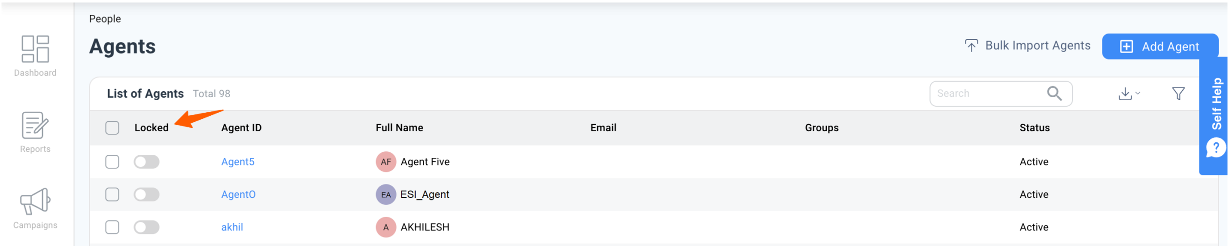
- Hold
- Mute
- EndCall
- Answer
- Decline
- Call Recording
- Manual Dial
- Conference Settings
  - Agent
  - Phone
- Transfer Settings
  - Agent Transfer
    - Warm
    - Blind
  - Skill Transfer
    - Warm
    - Blind
  - Phone Transfer
    - Warm
    - Blind
  - IVR Transfer
    - Warm
    - Blind

Note

You can update agent settings in bulk.

Locking an agent

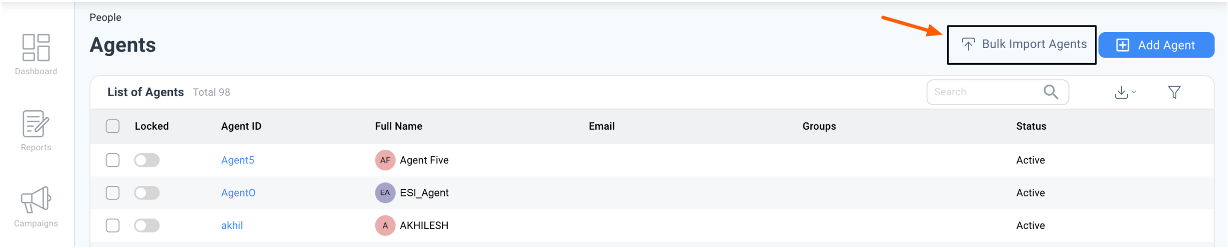
Agent locking in CloudAgent helps to temporarily restrict an agent's access to the CloudAgent portal without deactivating their account. When an agent is locked, their ability to log in is temporarily suspended, preventing them from handling interactions or utilizing system features.



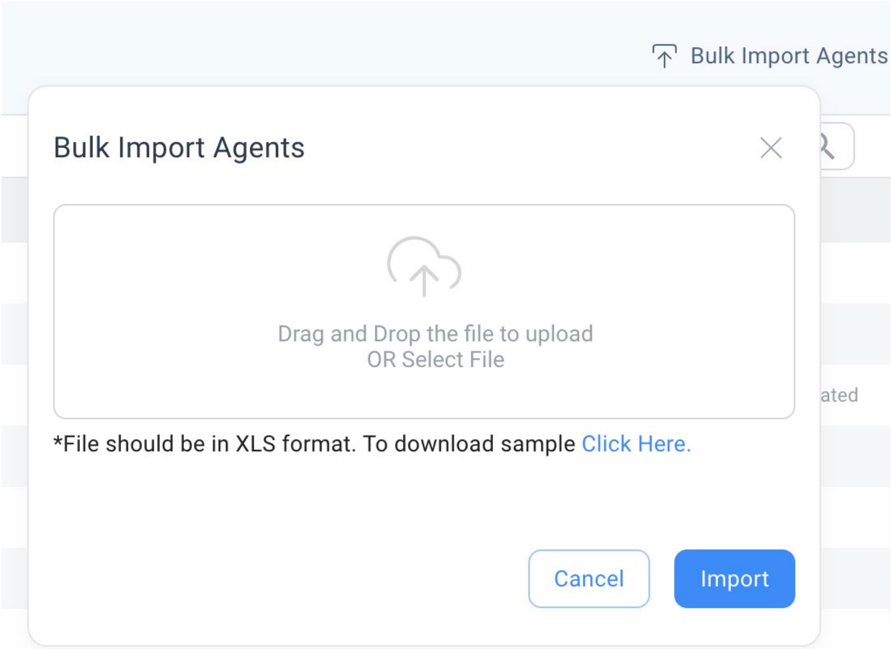
Bulk Upload Agents

The Bulk Upload Agents feature enables administrators to efficiently add multiple agents simultaneously, with a maximum limit of 1000 agents per upload. For uploads beyond 1000 agents, divide the files into smaller batches and upload them individually.

- Click on the Bulk Import Agents button as shown below.



- Download a sample XLS file and add the relevant agent data. Once the XLS file is filled, drag and drop it into the pop-up window or select it from your computer.
- Once you click on the "Import" button as shown below, the system will add the agents from the file that was uploaded.



Agent Deactivation / Activation

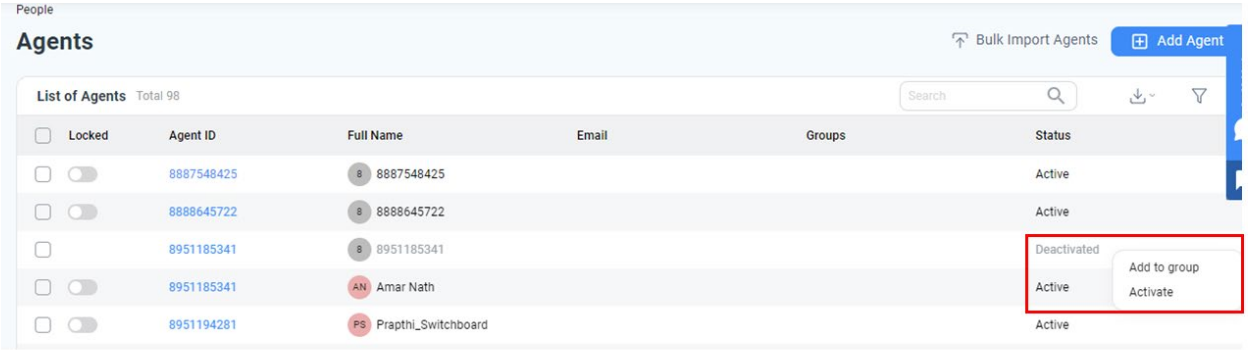
When an agent is deactivated, their access to the CloudAgent system is temporarily restricted. It's important to note that deactivation doesn't erase the agent entirely.

During the deactivation period, modifications to the agent settings are not possible. However, you have the flexibility to reactivate the agent at any point in the future.

Additionally, the system allows for efficient management of multiple agents by enabling the selection and adjustment of their status to either active, deactivated, or locked.

The deactivated agents can still be added to a group, providing continued flexibility in organizing and structuring agent configurations.

Access the three-dot menu associated with each agent to manage the deactivation or activation settings.



Groups

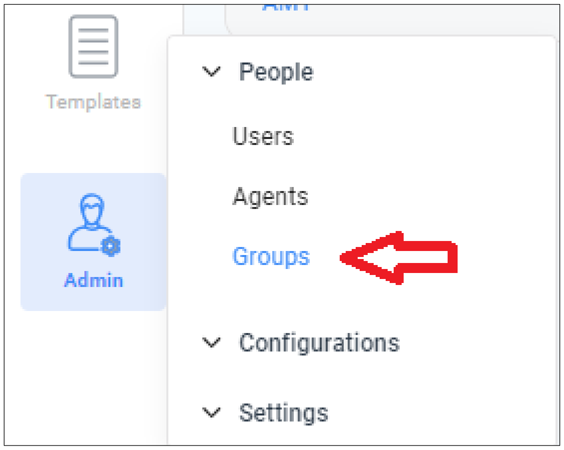
Introduction

As an administrator in CloudAgent, have the authority to create and manage groups. Groups provide an effective way to manage agents with common responsibilities or functions. This guide will walk you through the steps to create and manage groups in CloudAgent, including adding or removing agents as needed.

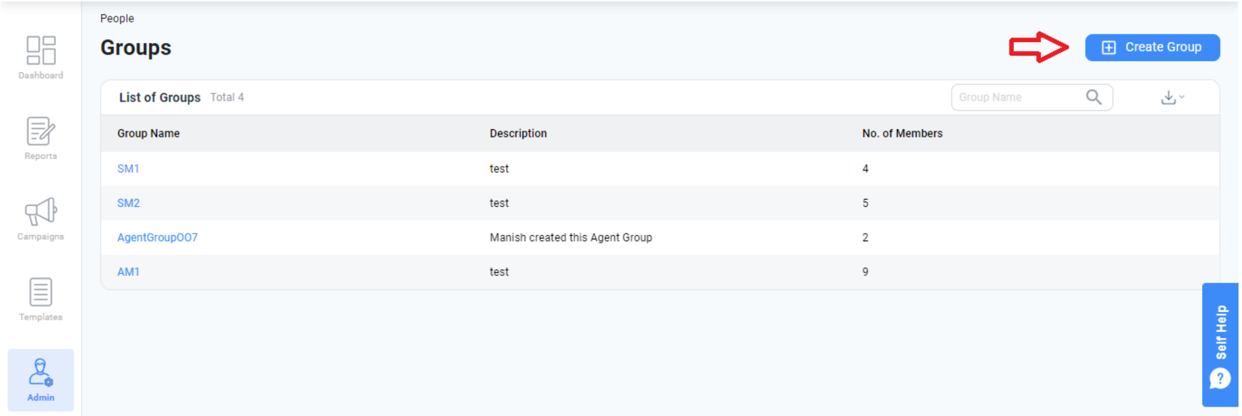
Creating a new group

To create a new group follow the following instructions

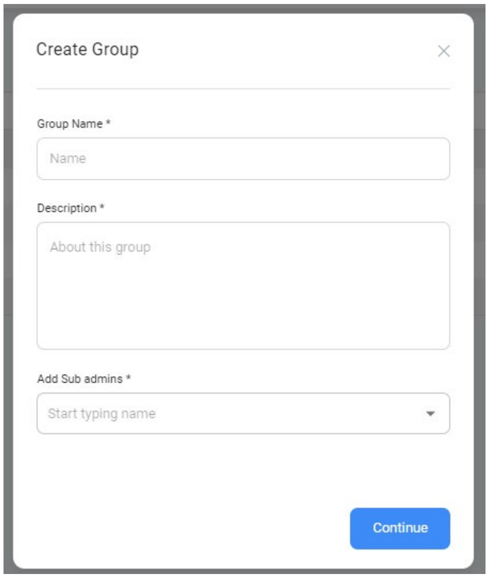
- Login to the CloudAgent portal as an admin
- Click on the Groups under People in Admin tab as shown below



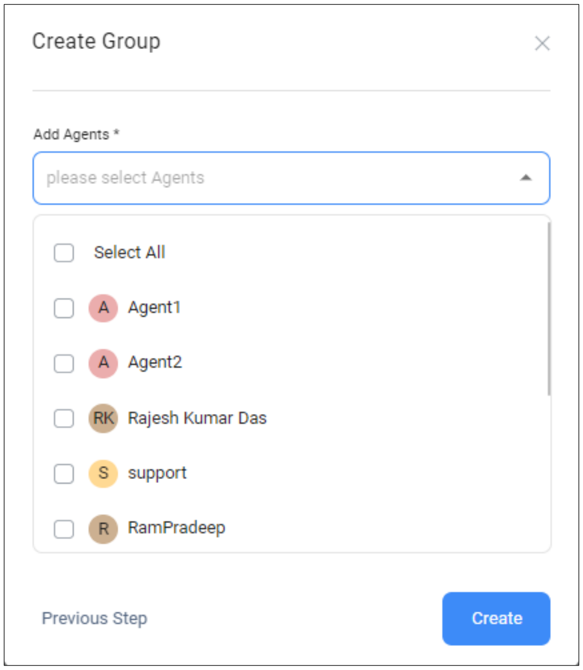
- Click on the Create Group button as shown below



- In the new window fill in the Group Name, Description, and Add Sub Admins to this group and click on the Continue button as shown below



- Now select the agents from the dropdown menu to add as per the requirement as shown below

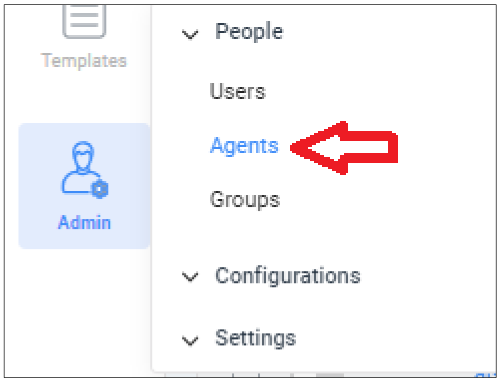


Adding/Removing Agents from an existing group

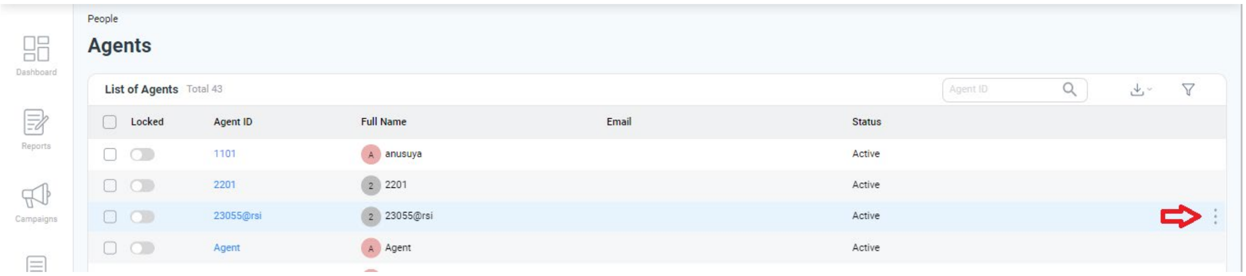
There are two ways to add agents to a group

From Agents

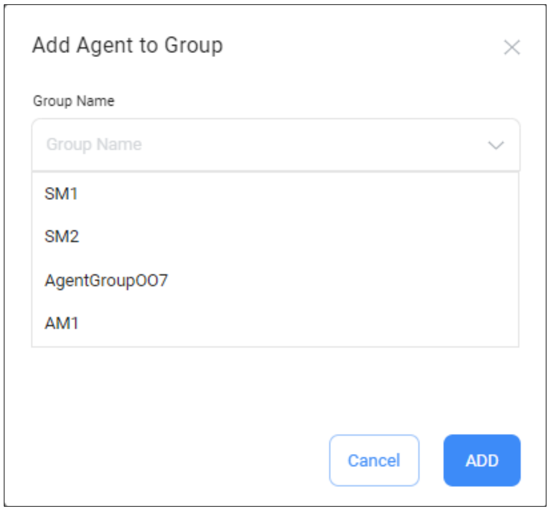
- Login to the CloudAgent as an Admin
- Click on Agents under People in Admin Tab as shown below



- Click on the three-dotted button to click on Add to group which will be visible when scrolling on any existing agents as shown below

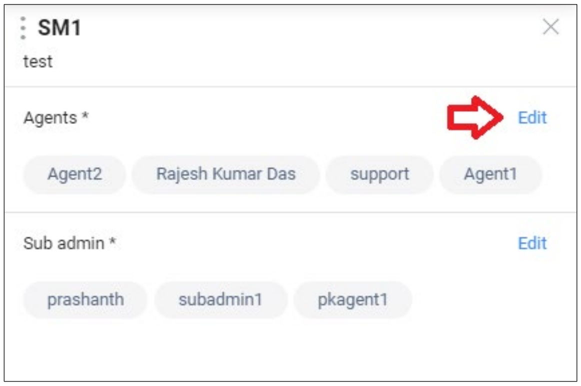


- Select the group from the dropdown list to which the agent should be added and click on Add button as shown below

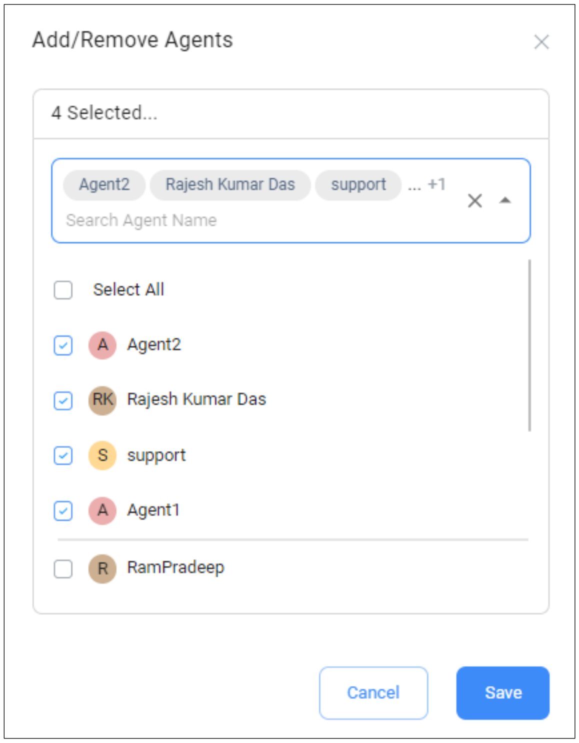


From Groups

- Login to the CloudAgent portal as an admin
- Click on the Groups under People in the Admin tab
- Double-click on any existing group to open the edit options and click on edit under Agents as shown below

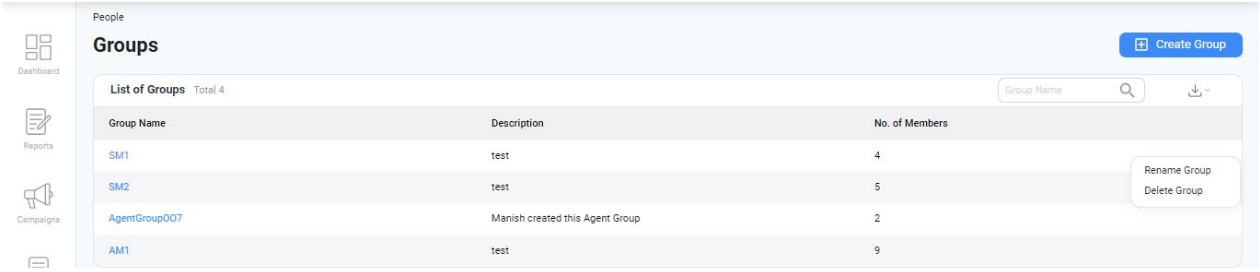


- Agents can be removed by clicking on the cross mark above the existing agents in the group or added by searching by name or selecting the agents from the dropdown menu and then click on Save to save the changes as shown below.



Renaming or Deleting an existing group

- Hover on any existing group to click on the three-vertical button, and click on this button to get Rename Group and Delete Group options as shown below



- Select the desired option and proceed further with on-screen instructions

Configurations

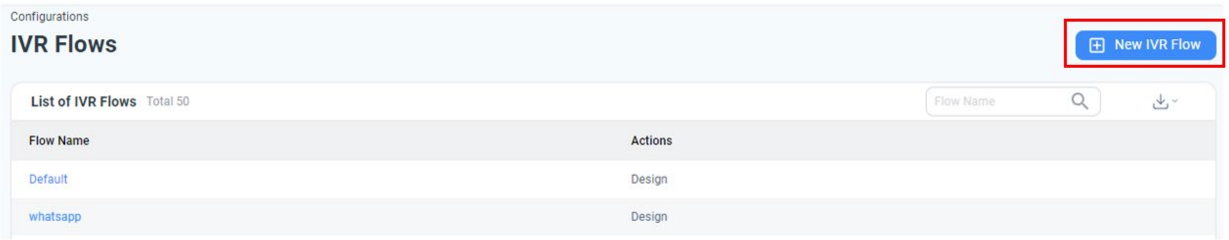
IVR flows

An IVR flow, short for Interactive Voice Response flow, refers to the sequence of interactions and menu options that a caller encounters when interacting with an IVR (Interactive Voice Response) system.

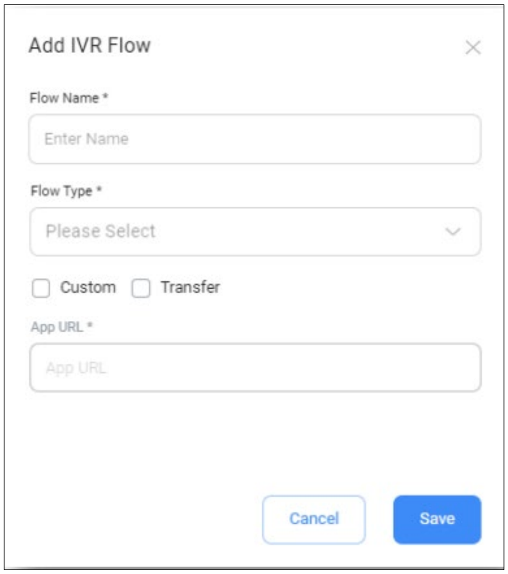
IVR systems are automated telephony systems that allow callers to interact with a pre-recorded voice menu using their phone's keypad or voice commands. The IVR flow guides callers through a series of prompts, offering them choices and options to direct their call efficiently to the appropriate department, service, or information.

Let's understand how to add an IVR flow to your Cloud Agent account.

1. Navigate to 'Admin -> Configurations -> IVR Flows' to access the **IVR Flows** page.
2. Click on the "New IVR Flow" button in the top right corner.



3. A pop-up opens, fill in all the mandatory fields and click on "Save." The fields are explained in the following table for reference.



Field	Description
Flow Name*	Name of the IVR Flow
Flow type*	Choose either IVR or ICR • IVR: Interactive Voice Response

Field	Description
	• ICR: Interactive Chat Response
Custom	This option is used to customize the flow through some other application. Enter the App URL if this option is selected.
Transfer	This option is selected if the call needs to be transferred.
App URL*	Enter the App URL. This option is mandatory if you have selected the custom option.

IVR Trackpoint Data on the Agent Toolbar

The IVR Trackpoint data configured in your IVR flow can now be displayed in the agent toolbar. This allows agents to have context on the customer's journey through the IVR system.

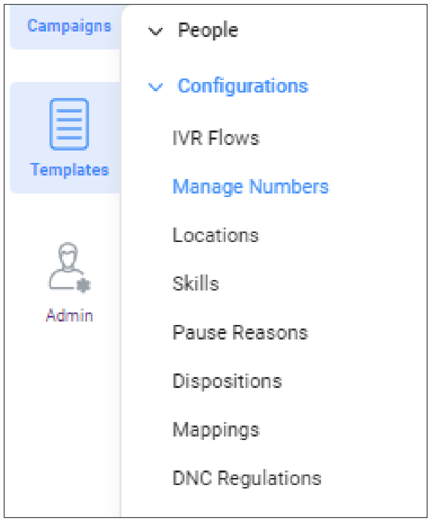
Note:

This feature is available only if the "**IVR Flow Journey**" setting is enabled in your account's Admin Settings.

Manage Numbers

The Manage Numbers option, located under the Admin tab, provides a central hub for adding and configuring various types of phone numbers used in contact center operations. These phone numbers are essential for seamless communication between agents and customers, ensuring efficient call routing, and maintaining a high level of customer service.

CloudAgent platform allows you to create Agent Phone Numbers, Dialout Numbers, Transfer Numbers, and Blocked Numbers. Let's understand about each of these available option and how to create them.



Agent Phone

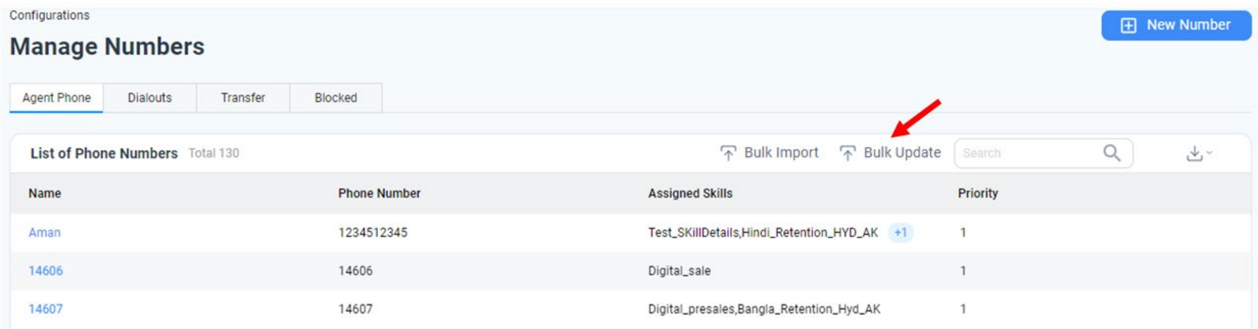
Follow the steps outlined below to add a phone number to your CloudAgent account:

1. Navigate to 'Admin > Configurations > Manage Numbers'.

2. On the Manage Numbers page, click on the 'New Number' icon, located at the top right corner of the page, and choose the 'Agent Phone Number' option.
3. Provide the **Phone Number** (or SIP number) & the corresponding agent **Name** to whom it will be associated.
   i. The format of the phone number can include the country code with '+' or just the number
   ii. For SIP number creation, ensure to check the 'SIP' checkbox. Then, select the SIP number from the dropdown list in the 'Phone Number' field. These SIP numbers are listed along with their corresponding SIP locations for ease of selection.
4. Choose the priority for the added number. This is particularly useful when agents are offline, and calls are routed using a hunting mechanism.
5. You can also tag Skills to the phone number. The configured skills on your account will be displayed as a list.
6. Click 'Save' to add the new number for an agent.

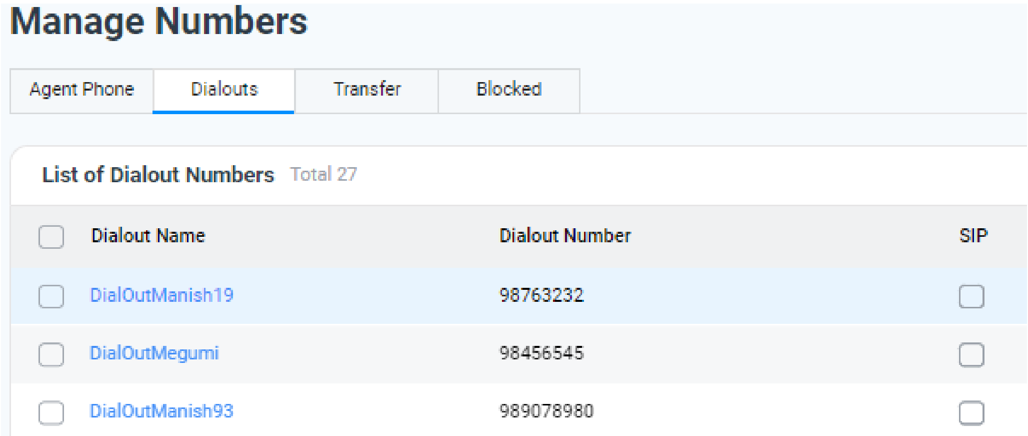
Bulk Upload

During a bulk upload of phone numbers, even if any invalid numbers are identified, only the valid numbers will be added to the system. The invalid numbers will be excluded from the upload, ensuring that only accurate and valid phone numbers are integrated into the system.



Dialout Numbers

The dial-out numbers need to be defined manually through this option.



Dial-out numbers are used for fallback rules in skills. When you want to dial a particular number when your agents are busy or not logged in, this option is used.

Transfer Numbers

This option defines the list of numbers for transferring calls.

The Transfer Number List is used to transfer calls to a third party. The name and transfer number are added to this list. There is also the option to call a SIP phone if it is supported in your account. The Agent can only transfer to a predefined number if the transfer list is defined. The admin can search the list automatically, and the data can be downloaded in XLSX format.

Blocked Numbers

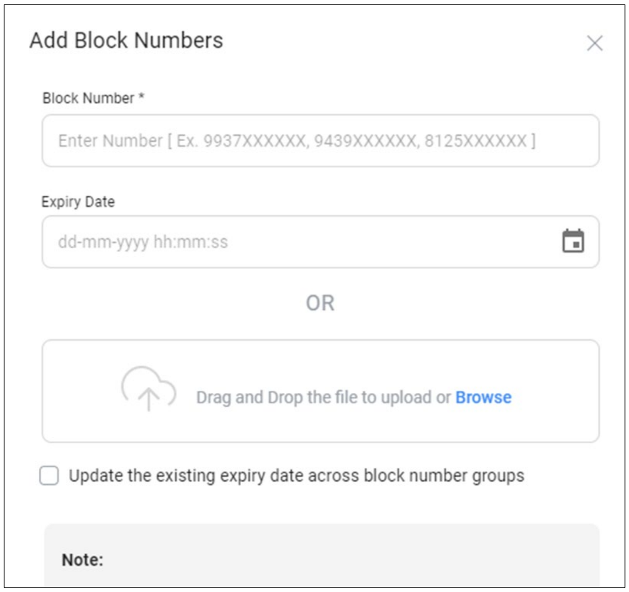
A "Blocked Number" option in a campaign refers to a feature that allows you to prevent certain phone numbers from being called. If the "Block Number" option is enabled on the campaign settings, the system will check the list of blocked numbers before making a call. If the number being called is on the blocked list, the call won't be made. This can be useful for preventing calls to numbers that have previously requested not to be called, or to numbers that have been flagged as spam or fraud.

Block Number Groups

This group can be created and managed by the user or administrator. The "Block Number Group" is a named list of phone numbers that have been designated as blocked numbers. Once a group is created, it can be easily referenced by name when setting up a campaign. This feature allows for greater flexibility and ease of management when it comes to blocking numbers.

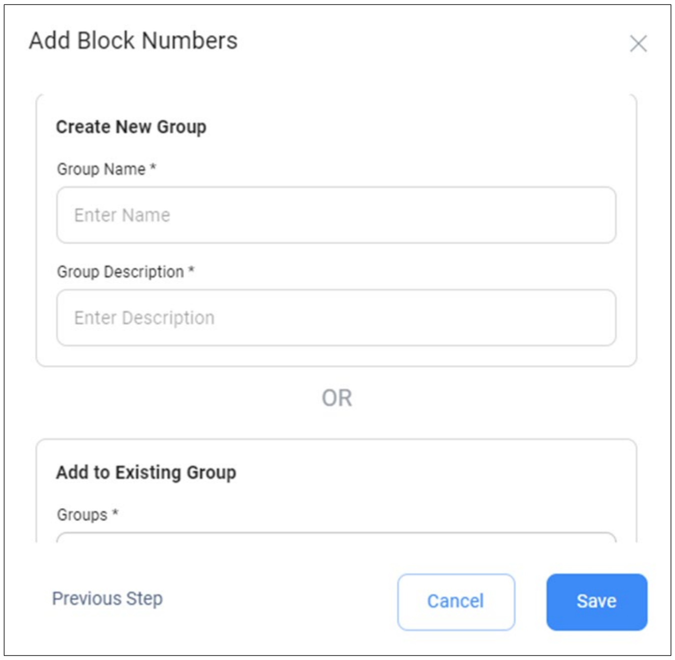
To create a block number group, follow these steps:

1. Access the admin login page and navigate to Admin -> Configurations -> Manage Numbers.
2. Select the 'New Number' button located at the top right corner and proceed to add a new block number.
3. Enter a list of block number(s) with comma-separated values in the 'Block Number' field. Additionally, specify the expiry date for these numbers if needed, indicating the duration you want them to remain in the blocked list.

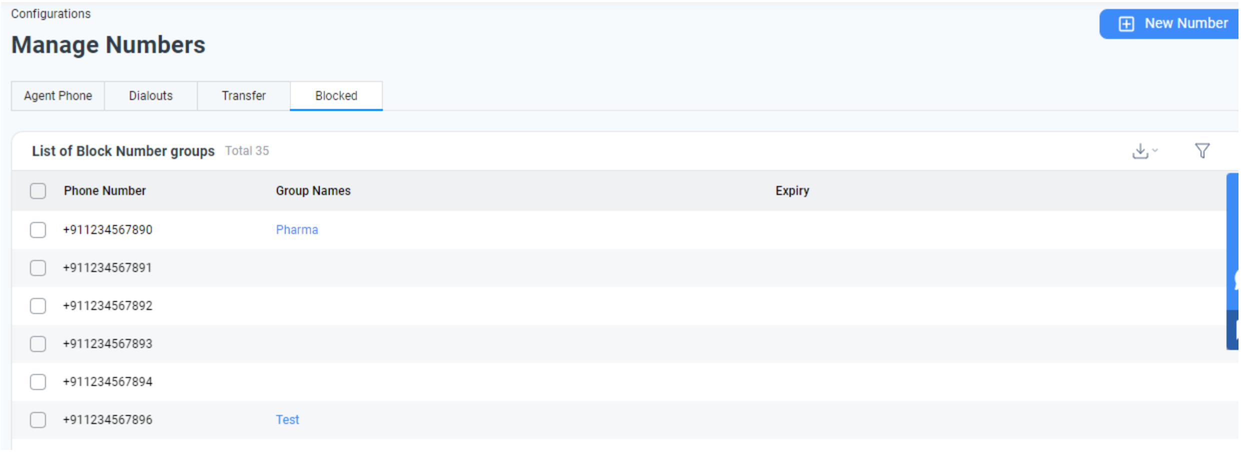


4. You also have the convenience of bulk uploading the list of numbers along with their respective expiry dates through a file upload. A sample file is provided for your reference.
    i. Make sure to check the box labeled "Update the existing expiry date across block number groups" if you want to update the expiry date of a number in all groups.

5. For the next step, you have the option to either create a new group for the added number(s) or add them to an existing group. Please provide a name and description for the group of your choice.



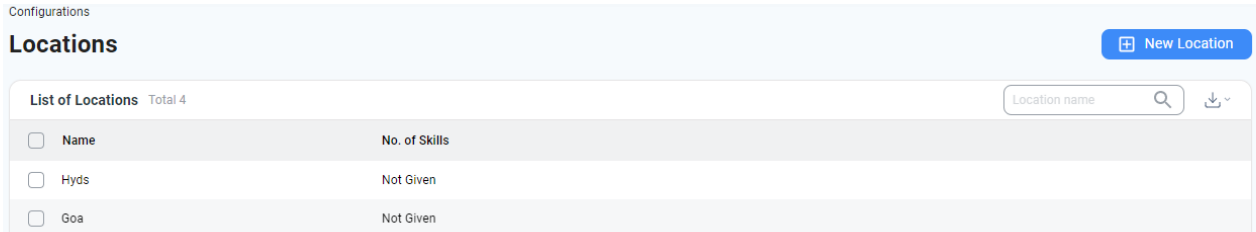
6. Once you've entered all the required information, click "Save" to successfully create the block number group. The numbers will then be listed along with the corresponding details including Phone Number, Group Names, and Expiry Date. Refer to the image below.



Locations

The Locations option under the Configurations tab is used to define physical locations.

To delete a Location, click on the 3-dot menu at the right end of the respective location and choose the delete option.



Skills

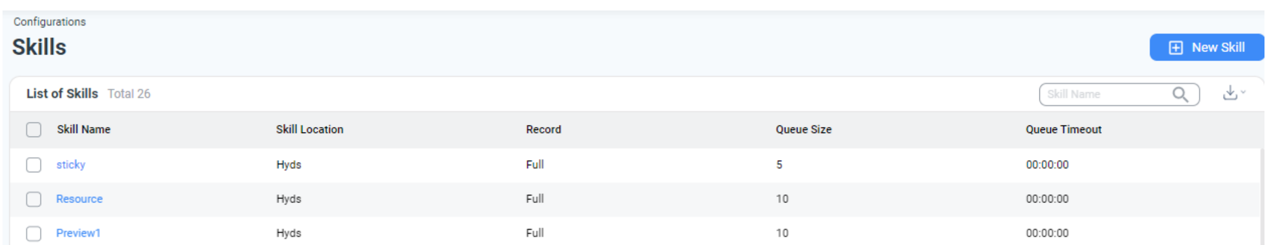
Skills are used to group agents in many systems. They allow administrators to categorize agents based on their specific expertise or capabilities. By defining skills, administrators can assign tasks or campaigns to specific groups of agents, ensuring that the right resources are being used for the right job. The example skills you provided, such as English-speaking, French-speaking, or sales and support, are common categories that can be used to define skills.

Additionally, creating a sub-administrator based on areas of expertise can be helpful in managing specific skills. This allows administrators to delegate some of their responsibilities to other users who are experts in
specific areas.

Skills can be used to handle inbound and outbound campaigns by linking them to specific skill groups.

To create a new skill, the administrator can use the "New Skill" option in the system.

Additionally, it is also possible to export the skill data in XLSX format.

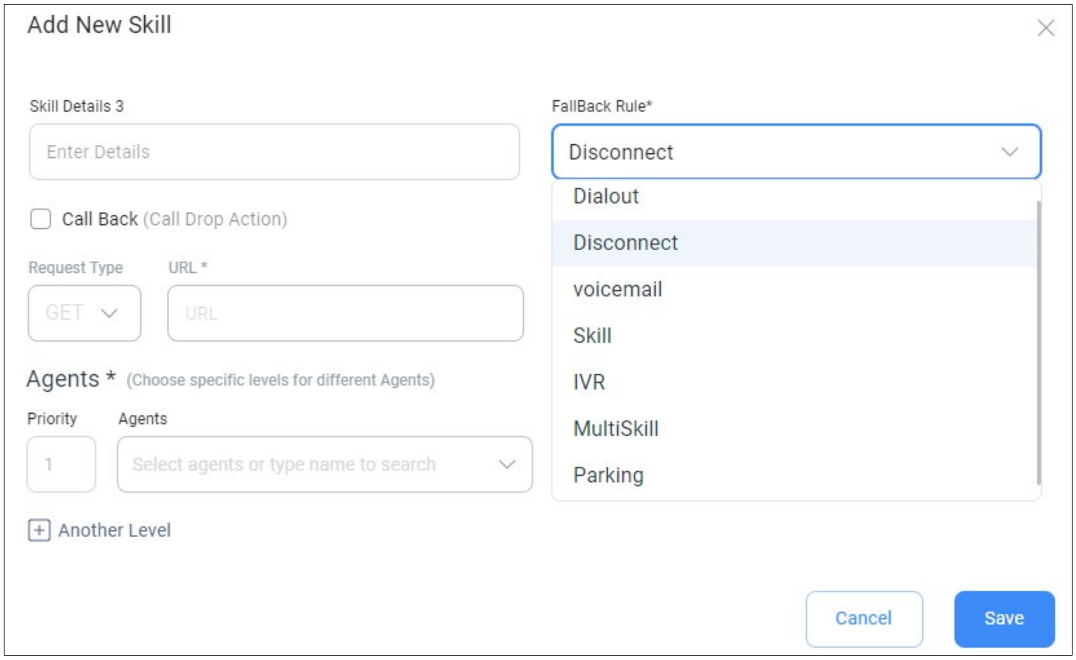


When creating a new skill, the administrator will typically need to enter information into various fields in the system. The below table provides information about the fields that need to be entered when creating a new skill.

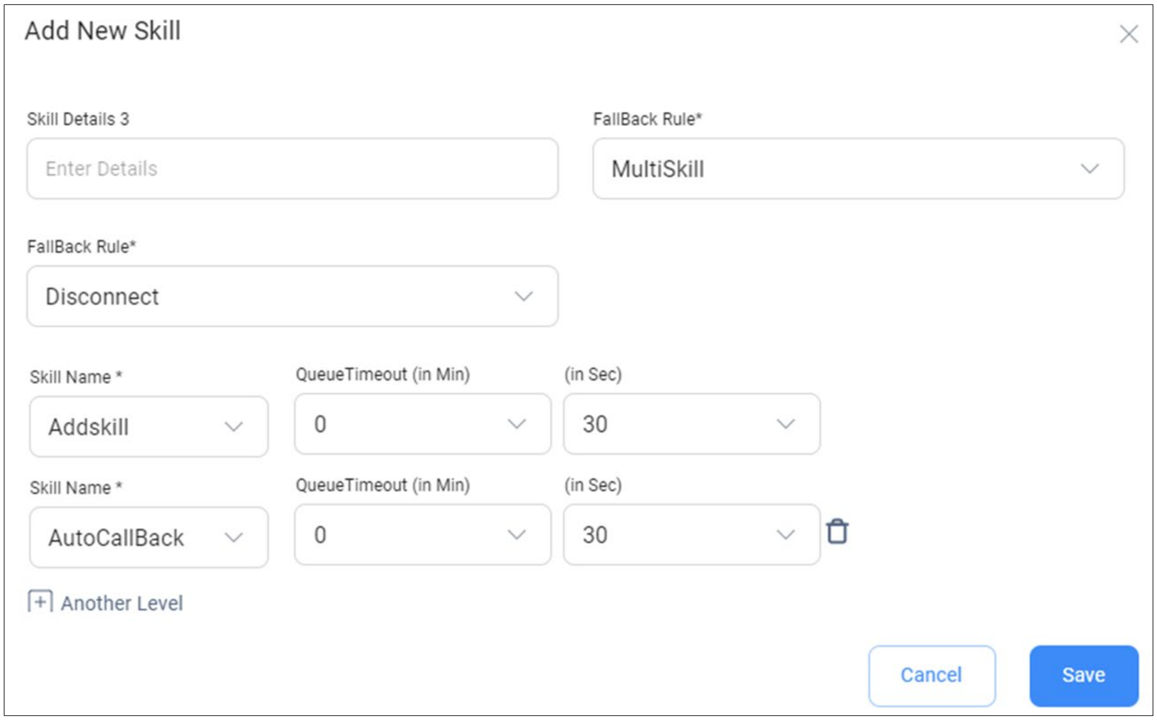
Field	Description
Skill name (required)	The selected skill group will be greyed out. Inbound Calls cannot come to the skill group unless the customer IVR is configured for the same. Agents and phone numbers must be predefined before adding a skill group.
Skill Location (required)	Locations need to be predefined from the Locations page. This gets linked to a dropdown on the Skills page.

Field	Description
Skill Details	Additional details on the skill can be added.
Record (required)	Either full or conversation must be selected. Full means recording the entire call from the time the customer enters the IVR. Conversation means only recording the conversation after Agent has picked up the call.
Assign Phone Numbers for Hunting (Offline)*	Phone numbers are assigned for offline use when Agents are not available to receive calls.
Queue Size (required)	No. of customers in the queue for a skill group
Queue Timeout	The time that the customer stays in the queue; 0 minutes and 0 seconds means no timeout. If a timeout is selected, a fallback rule needs to be defined.
Agents	Agents can be grouped into different priorities for handling calls in the skill. Priority 1 agents are the highest priority and will be offered calls first and Priority 9 will be the lowest
Fallback Rule (required)	Defines what the fallback for the customer should be once the queue timeout expires. Select from the dropdown list.

Fallback rules can be configured in various methods to service a customer once the queue limit expires and the options are seen in the dropdown.



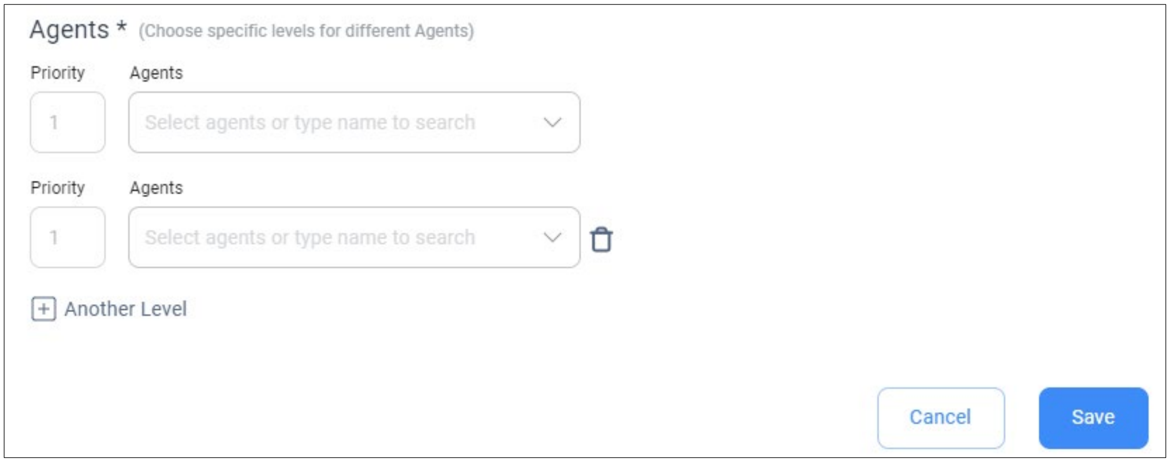
The FallBack Rule can be configured to Multiskill to route calls to another skill and further to a different skill with timers to service the call with different skill groups as the business may require. The below table shows the details.



Fallback rule	Description
Dial out	Dial out to a configured number once the queue timeout expires. A supervisor's number could be for example configured. This is done using the dial-out numbers tab in the configurations menu.
Disconnect	Disconnect the customer once the Queue expires.
Voice mail	Transfer the call to voice mail once the queue timeout expires.
Skill	Transfer the call to another skill that can be selected from the drop-down list of skills
IVR	Transfer to IVR (like press 1 for a callback, else wait in queue)
Multi skill	If Multi skill is selected, the options are to route the call to another skill, and the timeout for the same along with Fall Back options are further defined.
Parking	When chat conversations exceed the queue timeout, they will be parked on the agent's toolbar for up to 24 hours. After this period, the conversation data will be abandoned. - Agents can access parked chats and pull them from the queue based on

Fallback rule	Description
	availability and preference. - However, agents cannot pull additional chats if they have already reached the limit specified in the Concurrent Chats field.

The “Agents” section enables admins to select agents from a drop-down. Admins can prioritize agents based on their skill set, ensuring that the most skilled agents receive calls first for a particular skill.



Source of the below image: Existing in-ccaas instance (feature)

Click on the Save button and the skill is ready to use. The only caveat is to have a mapping of the DID number for the skill in the IVR to have the group receive Inbound Calls.

Pause Reasons

Agents may need to take breaks during their shifts for various reasons. To track these breaks, pause reasons are often used. Pause reasons are used to define the specific reason why an agent has taken a break, such as for lunch, a personal issue, or a training session.

As an administrator, you can define the pause reasons along with the pause time based on your business requirements. The system will then track when agents go on pause and the reasons for their breaks. Once the pause time has expired, the agent will receive a notification indicating that they can return to their work.

If the pause reason or timer needs to be changed, the administrator can do so by clicking on the "3 dot menu" for the respective pause reason and deleting or modifying it as needed.

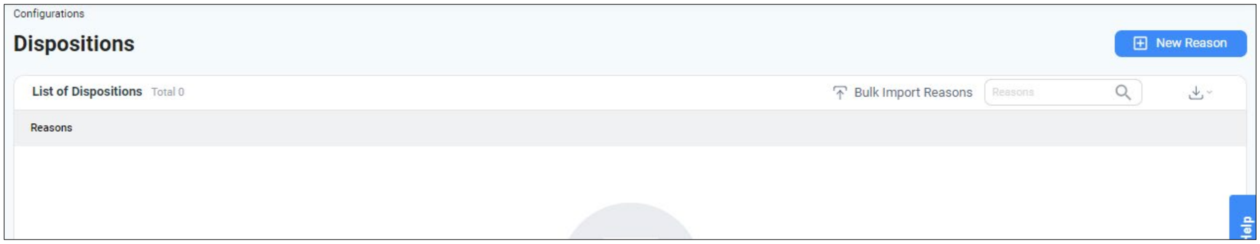
It is also possible to export the pause reason data in XLSX format.

Dispositions

The disposition list option in the 'Admin' tab is used to define the call completion process with a meaningful description. A disposition is a way to classify a call, and it allows administrators to define the reason for the call outcome.

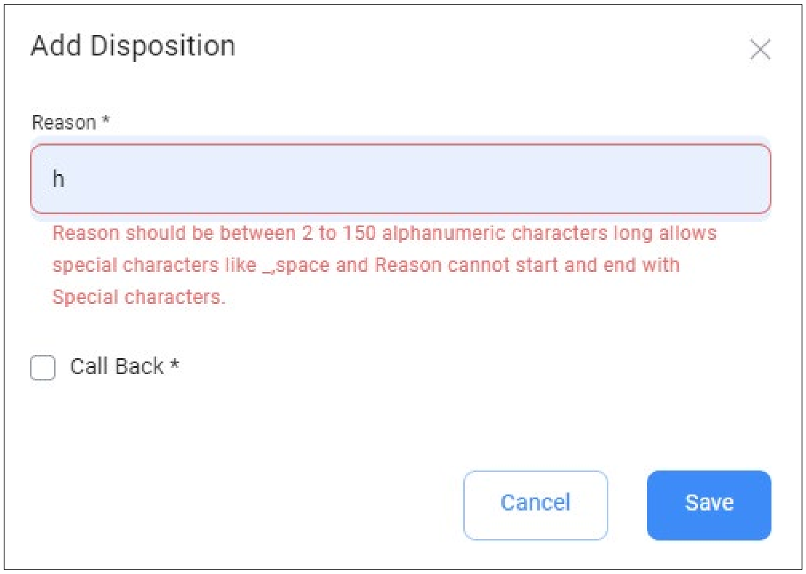
The administrator can define new disposition reasons by using the 'New Reason' option. These reasons can be changed over time, depending on the needs of the business. If a disposition needs to be changed for any reason, the administrator can do so by clicking on the "3 dot menu" for the respective disposition and deleting or modifying it as needed.

It is also possible to export the disposition reason list in XLSX format.



Note:

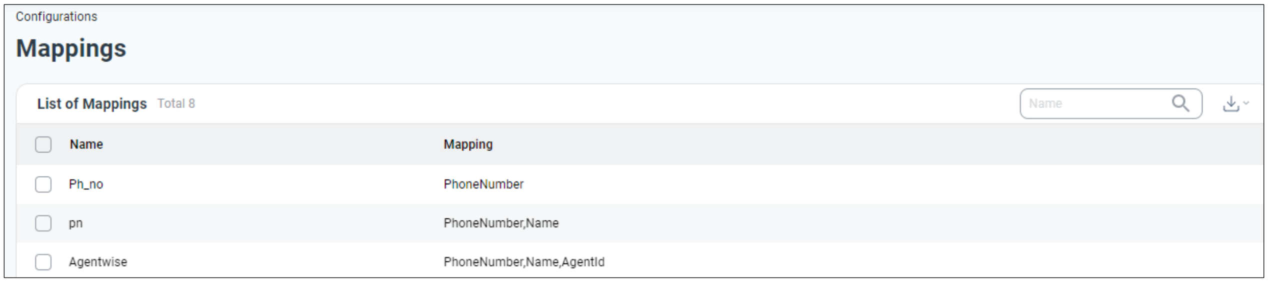
Please note that a valid disposition code must be at least 2 characters long and can contain up to 150 alphanumeric characters. If callback alerts are needed, make sure to enable the Callback option.



Mappings

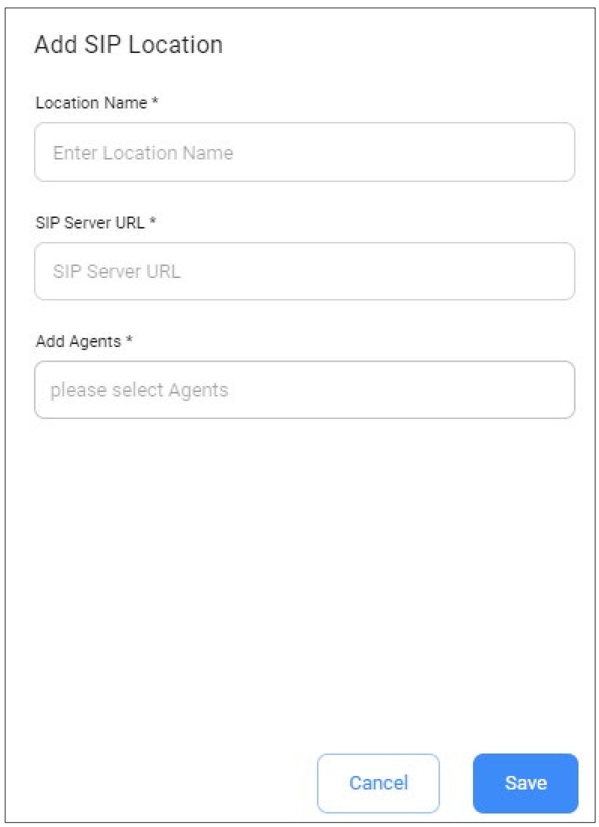
Mappings are used to map Excel databases for creating campaigns.

The mappings page in the Admin tab displays the mapping names created in the outbound campaigns. This page allows administrators to easily manage the mappings and delete any mappings that are no longer needed. The mapping name refers to the file that was created and uploaded into the outbound campaigns earlier.



SIP Locations

This feature helps to add a New SIP location. The SIP Location refers to the physical location where the SIP numbers are enabled and can be used.



The SIP server URL is the address of the server that manages the SIP numbers for a particular location. This URL is provided by ESI and is required to set up the SIP numbers for use.

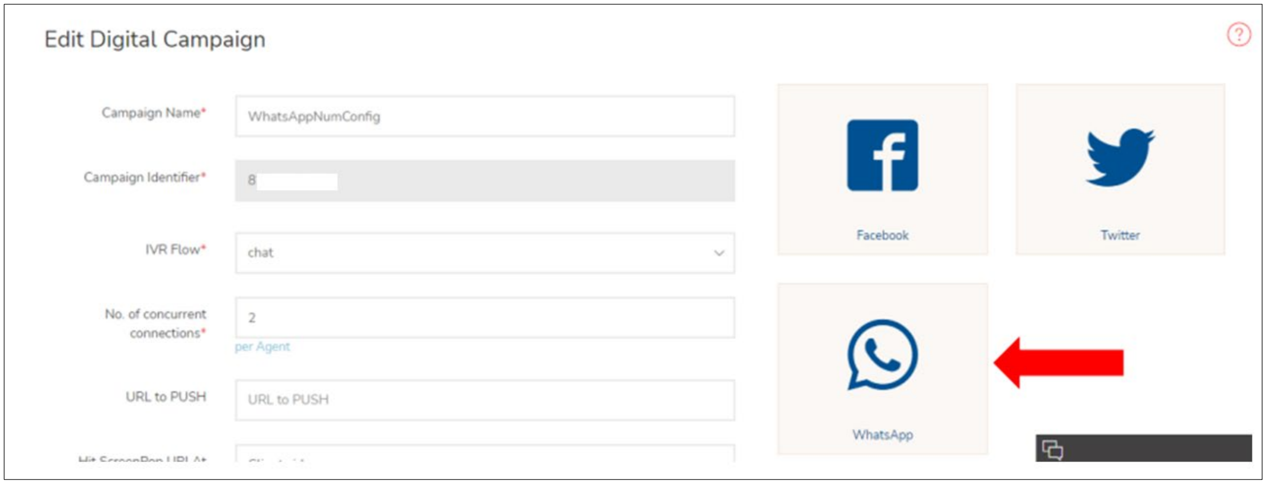
As an admin, you can add relevant agents for each SIP location. Please note that each agent should be tagged to a unique SIP location.

This allows you to manage the distribution of incoming calls and assign the calls to the most appropriate agents based on their skills, availability, and location. By assigning agents to specific SIP locations, you can ensure that the calls are handled effectively and that the customers receive the best possible service.

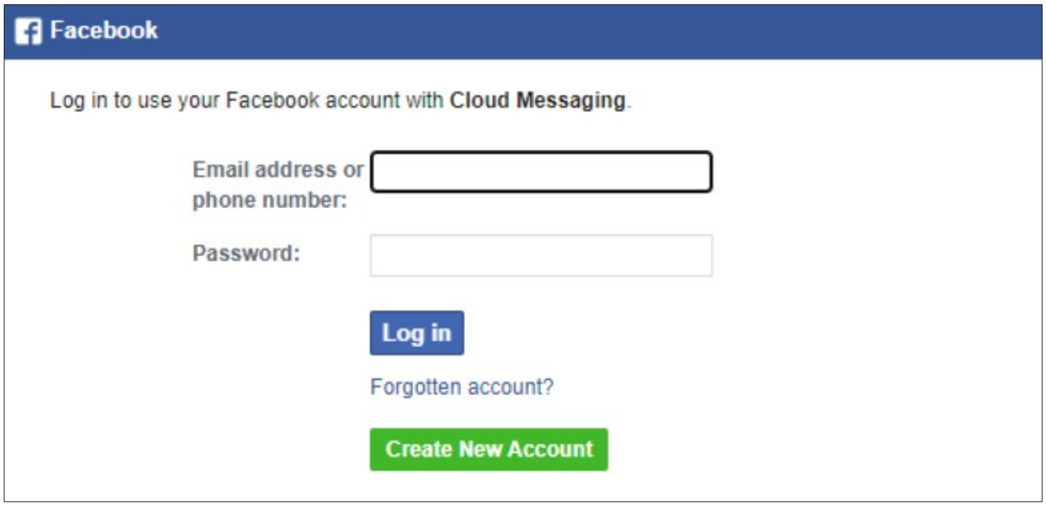
WhatsApp Configuration

To configure WhatsApp for digital campaign(s), follow these steps:

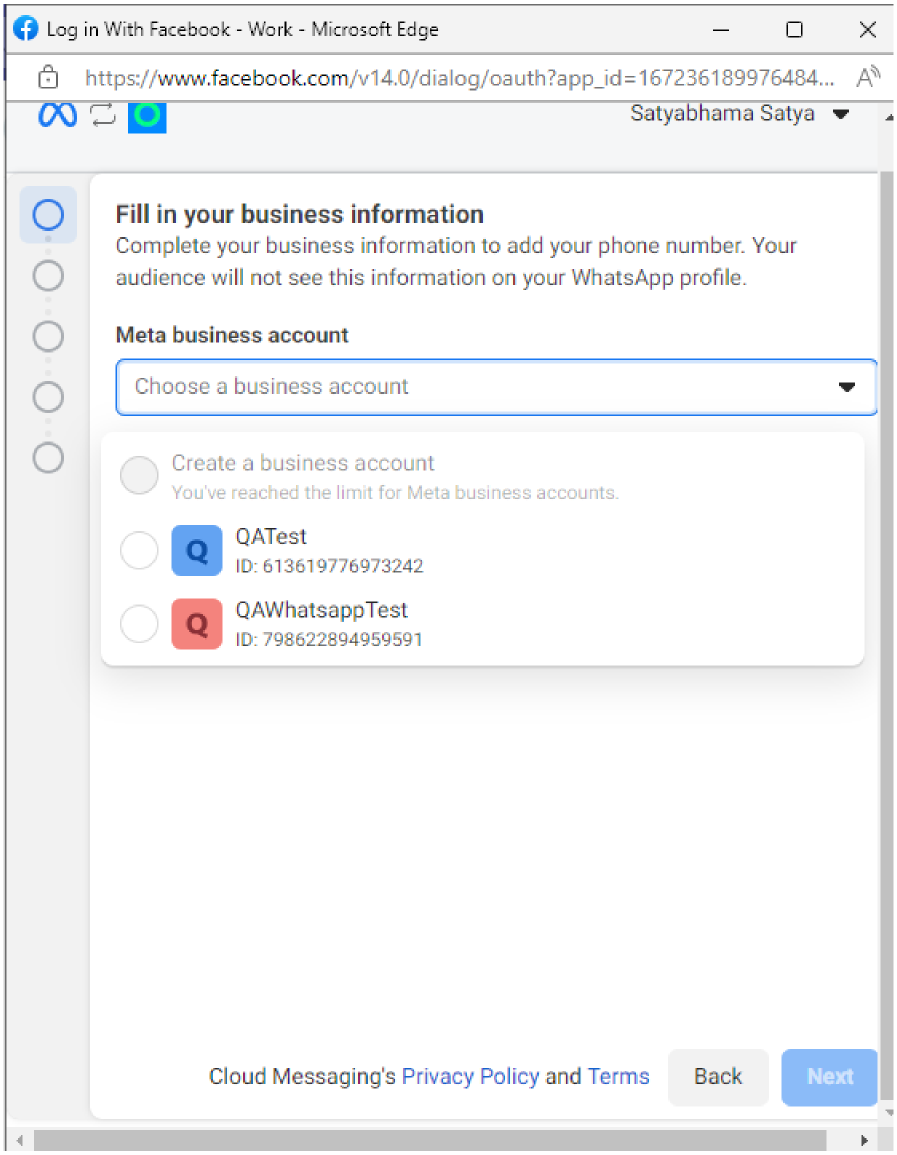
1. Create a digital campaign on the CloudAgent platform.
2. "Edit' the campaign.
3. Click on the WhatsApp integration icon to open a pop-up that prompts you to log in with Facebook.



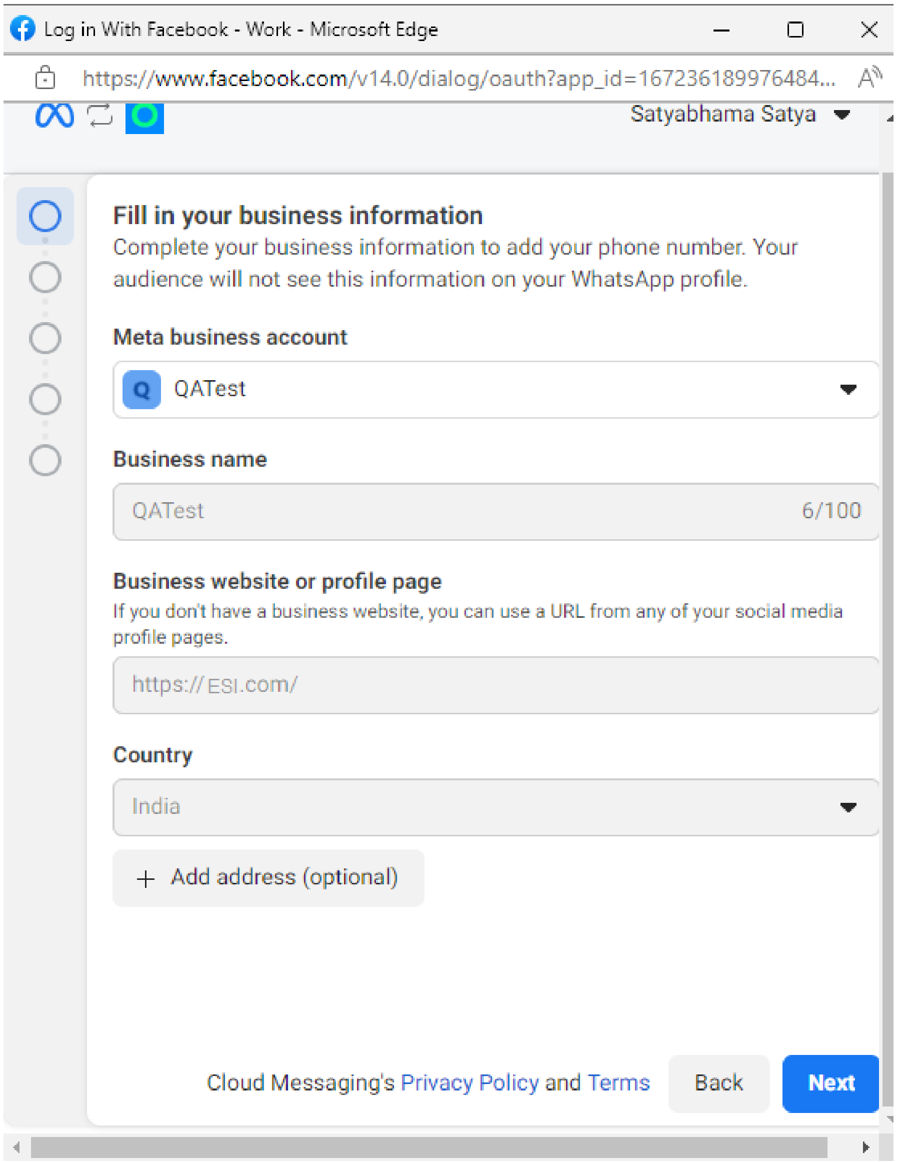
4. Log in to your Facebook account or create a new account if you don't have one.



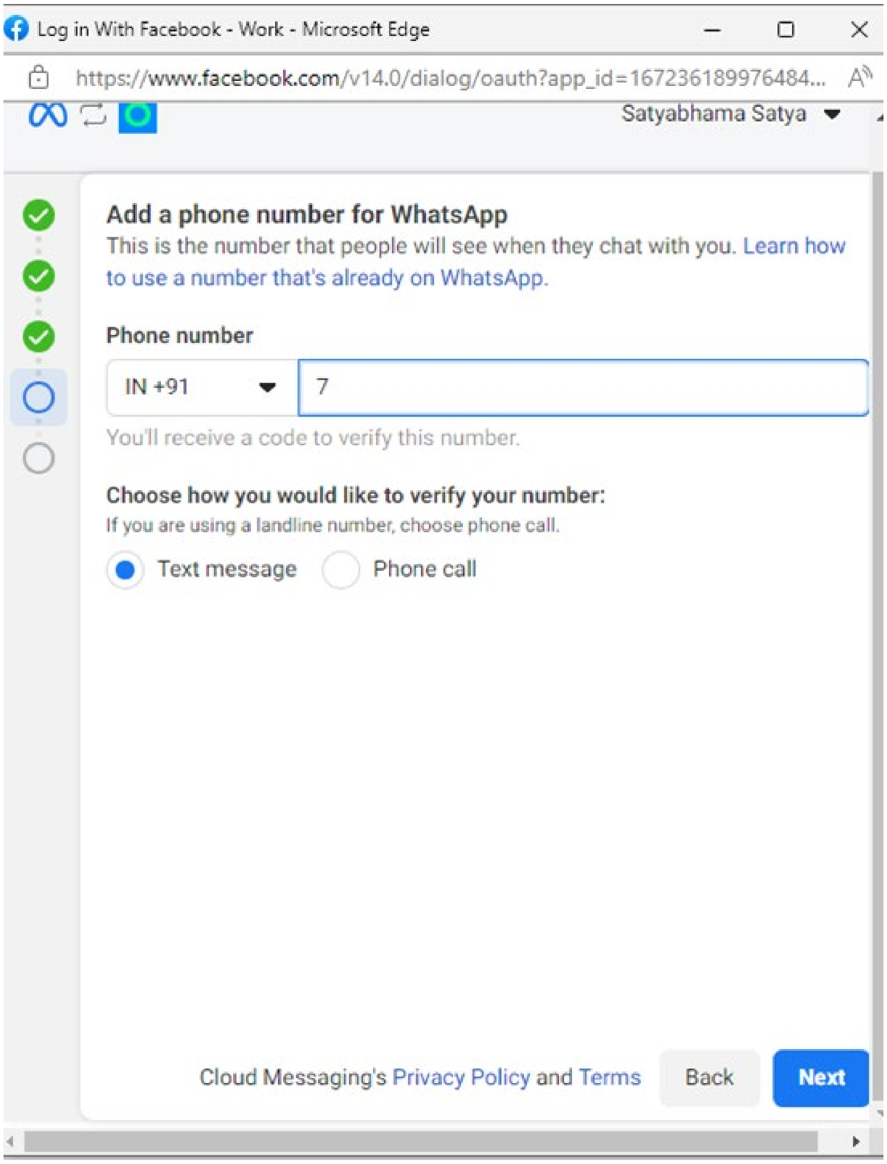
1. Create a Meta / WhatsApp Business account if you don't already have one.



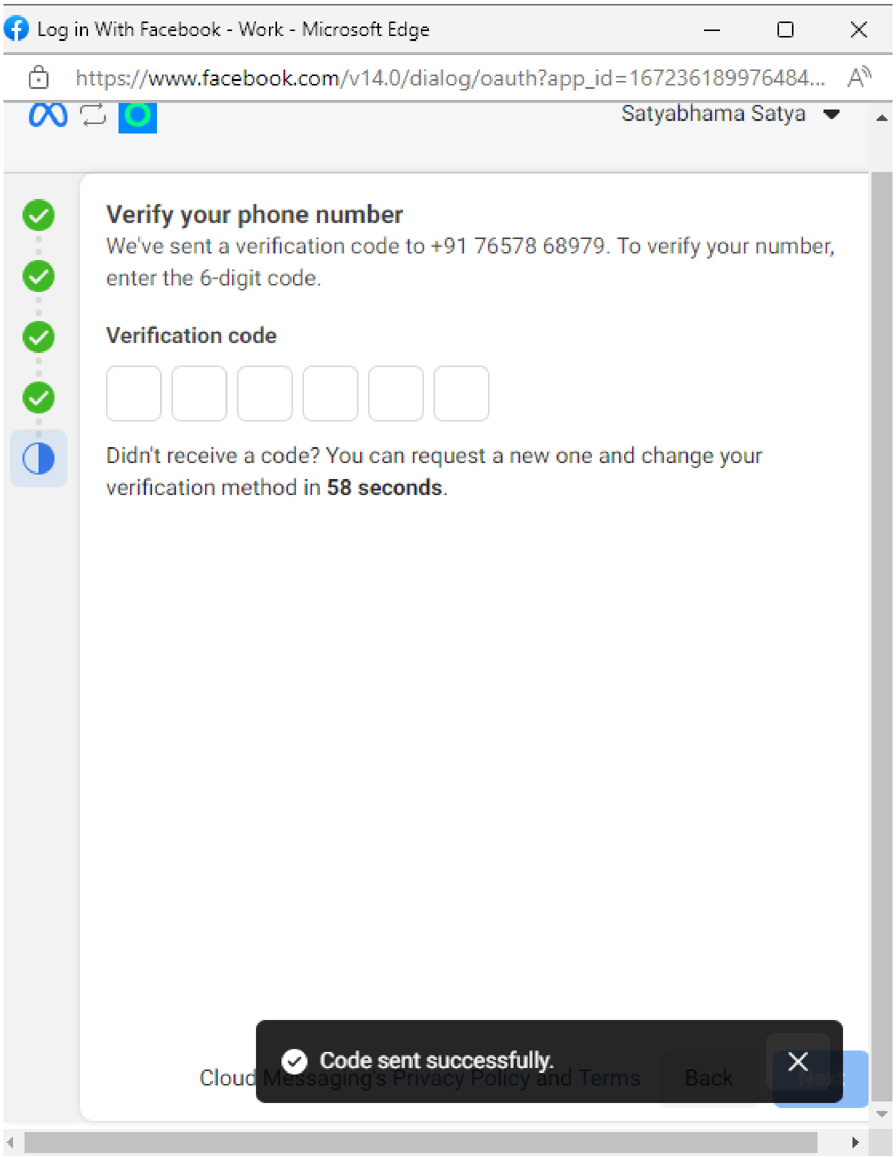
2. Set up your business profile with your business name, business website, country, description, etc.



3. Add a phone number for WhatsApp.



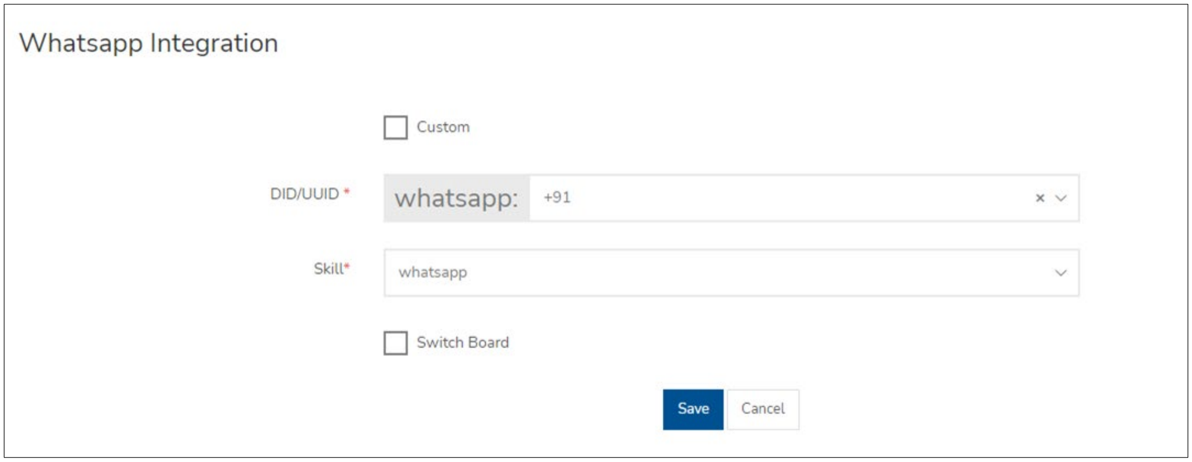
4. Verify your WhatsApp Business number or DID (an OTP or voice mail will be sent to the corresponding mobile number). In the case of DID (ESI provided), currently the verification of OTP is with ESI as of now (will be brought to the front end in the coming releases).



5. Once the business account is verified, admin will be redirected back to the CloudAgent platform.

6. Configure the verified WhatsApp number or DID on the WhatsApp integration page to start using it for your digital campaign.
    i. Click on the setting button on the WhatsApp integration icon.

2. Add the verified phone number / DID (Direct Inward Dialing) number that was set up earlier, along with the appropriate skill.



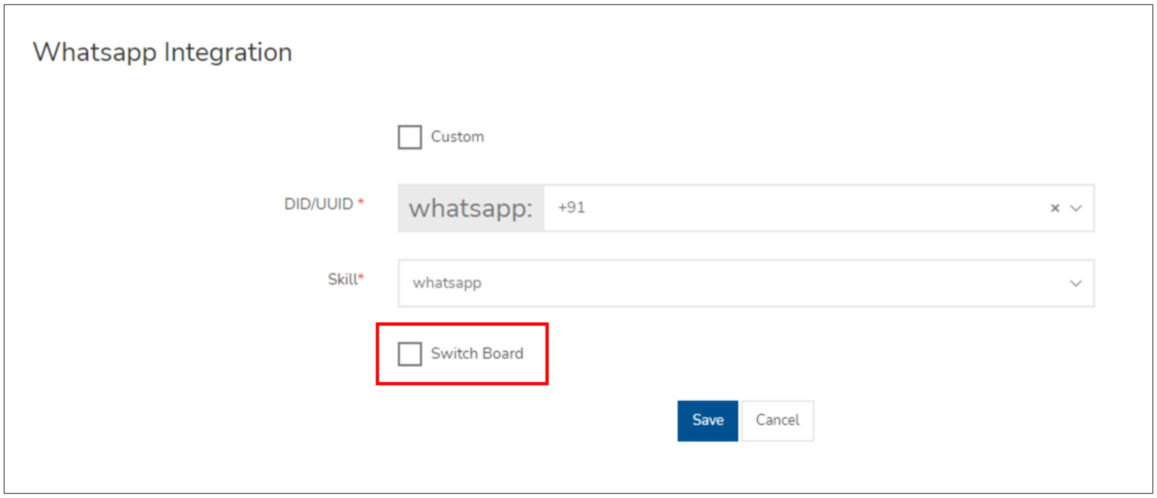
By following these steps, you can seamlessly integrate WhatsApp into your digital campaign and use it as a communication channel to engage with your audience.

WhatsApp Switch Board in CloudAgent

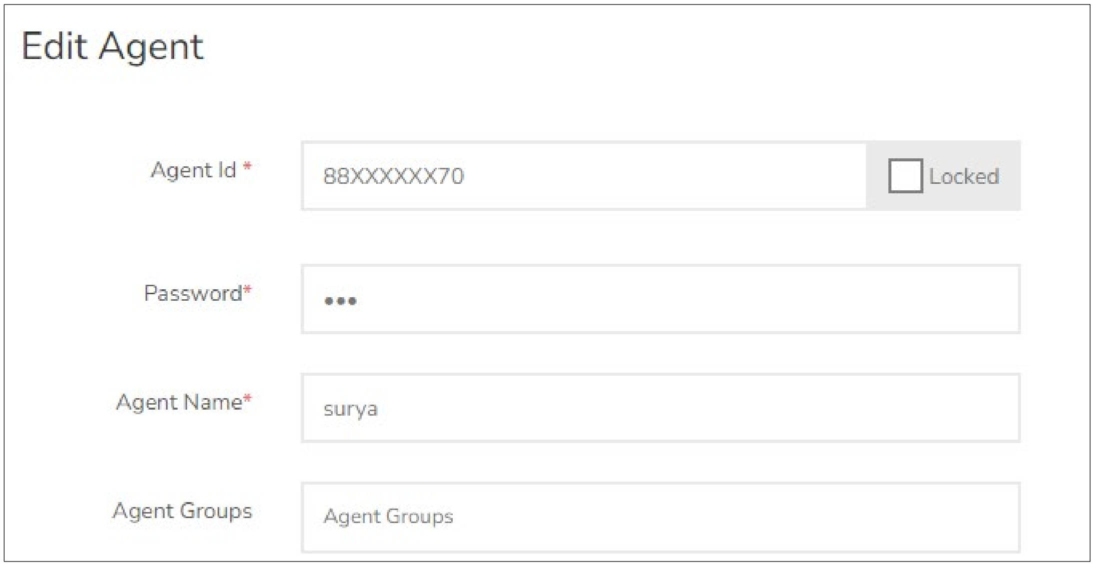
With the WhatsApp Switch Board feature in CloudAgent, agents can receive messages even after office hours, even when they are not logged into the CloudAgent toolbar. This means that customers can continue to reach out and get assistance even outside of regular business hours. Agents can receive WhatsApp messages on their configured mobile number. In addition, administrators can generate performance reports
for agents and campaign productivity reports based on the WhatsApp campaign.

Admin checkpoints

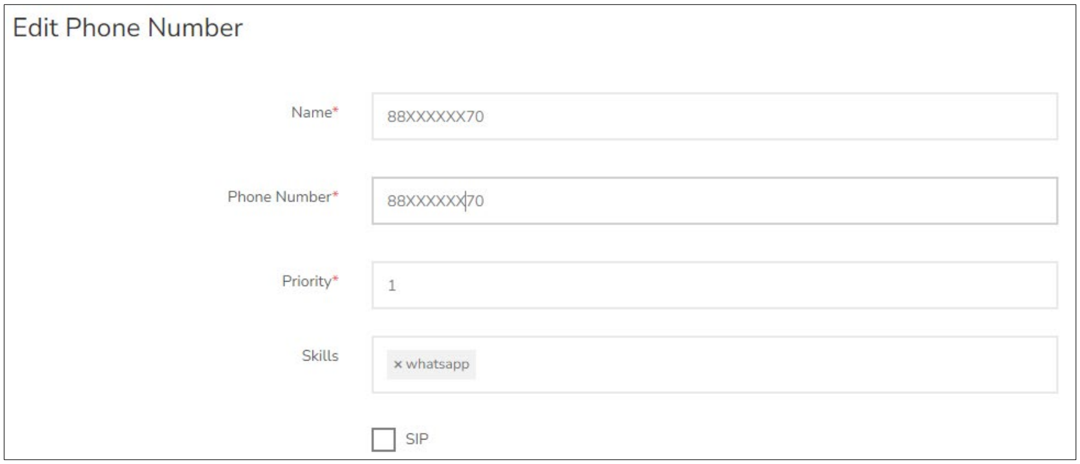
1. **Enable the "Switch Board" option**: Admin has to enable the “Switch Board” option in the campaign setting to activate this feature.



2. **Configure Agent ID as phone number:** When configuring agents, the Agent ID must be their existing WhatsApp number. This ensures that they can access customer conversations via WhatsApp Business API.



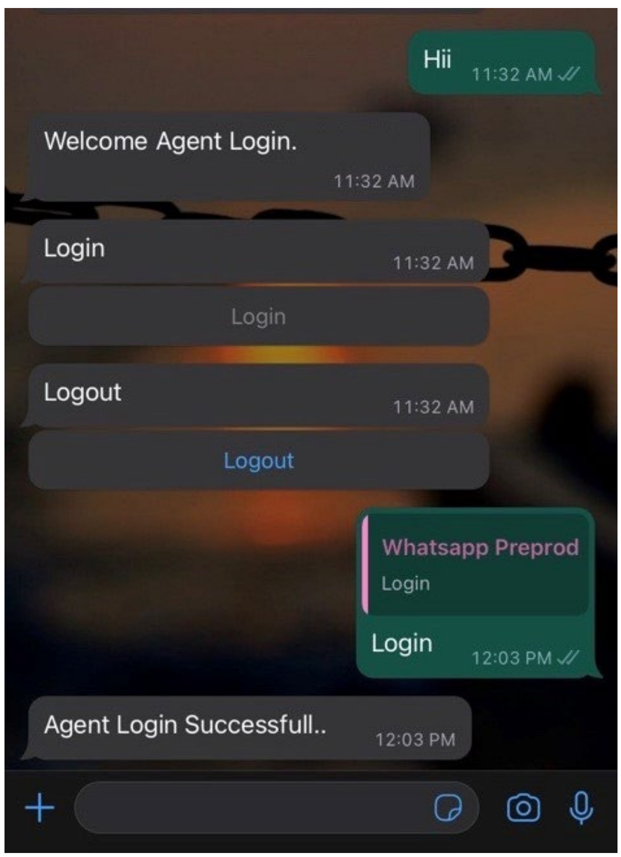
3. Phone number and Agent ID must match: It is crucial that the phone number used to log in matches the Agent ID. This ensures that only authorized agents can access the system and handle customer conversations.



How to access the feature:

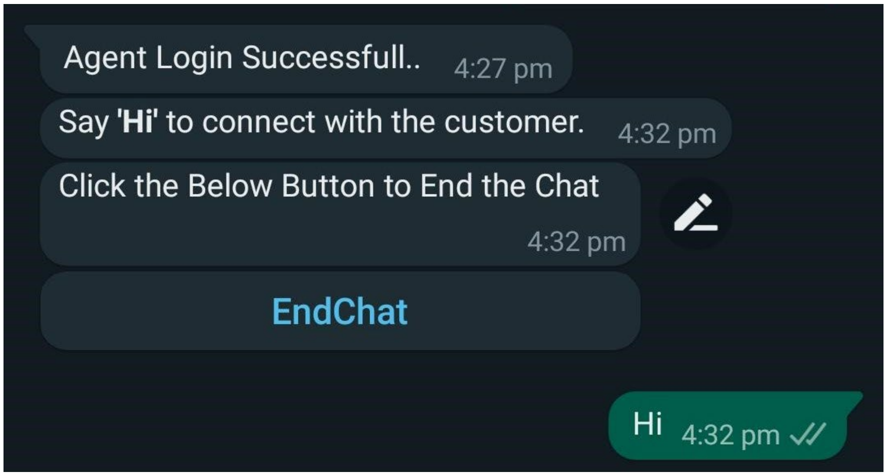
To virtually log in to the WhatsApp chat, an agent needs to follow these steps:

1. Send a message to the DID using the phone number associated with your Agent ID.
2. You will receive a reply with two options: "Login" and "Logout".
3. Click on the "Login" button to log into the system.



4. Agent gets logged in successfully and his status will be “IDLE”

5. When a customer sends a message to the DID, agent gets a message saying “Say Hi to connect with a customer”.



6. As soon as the agent sends “Hi” message, he gets connected with the customer.
7. After the conversation is complete, click on the "EndChat" button to close the chat and the Agent becomes IDlE again.
8. Agent needs to click on the “Logout’ Button (received along with the “Login” button) to completely log off from the system.

Admins can force logout or release agents from the system, which triggers a message to the agent saying "Chat disconnected" to inform the agents of the logout.

Where to check the reports:

To monitor agent status and view reports, admins can use the following reports:

1. **Digital Detail Report:** Useful to get the live reports for the current day such as Start time, End time, Channel, Campaign, Transcript, etc.
   To access this report, log in to the “Dashboard” and go to Reports > Digital Detail Report.
2. **WhatsApp Digital Report:** Useful to get the historic reports for the past days. Such as Message ID, User Phone Number, and Time.
   To access this report, log in to the Reports and go to Digital > WhatsApp Digital Report.

Holidays

Managing Holidays for Outbound Campaigns

You can manage holidays to ensure that no calls (including retries) are made on those dates, and scheduled callbacks are also skipped. This applies specifically to outbound campaigns only.

Follow these steps to configure holidays for your outbound campaigns:

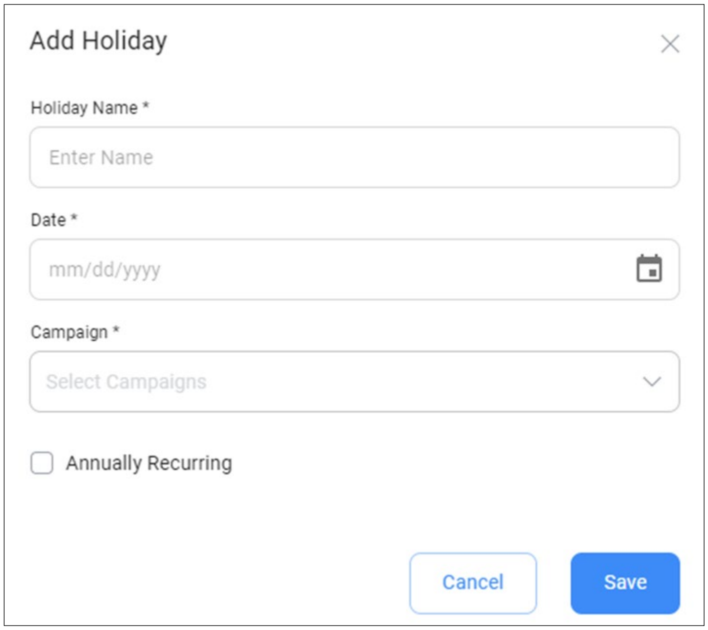
1. **Navigate to the Holidays Configuration:**
   i. Log in to your admin account.
   ii. Go to "Admin" > "Configurations" > "Holidays."
2. **Add a New Holiday:**
   i. Click the "Create New" button in the top right corner.
   ii. Fill out the holiday details in the form that appears:

a. **Holiday Name:** Enter a name for the holiday.

b. **Date:** Specify the date of the holiday.

c. **Campaign:** Select the relevant campaigns from the drop-down list to which the holiday will apply.

d. **Annually Recurring:** Enable this option if you want the holiday to recur every year.



3. **Save the Holiday:**
    i. After entering all the details, click the "Save" button to save the holiday information.

By following these steps, you can ensure that your campaigns respect the holiday schedule and that no calls or callbacks are made on these dates.

Impact on APIs

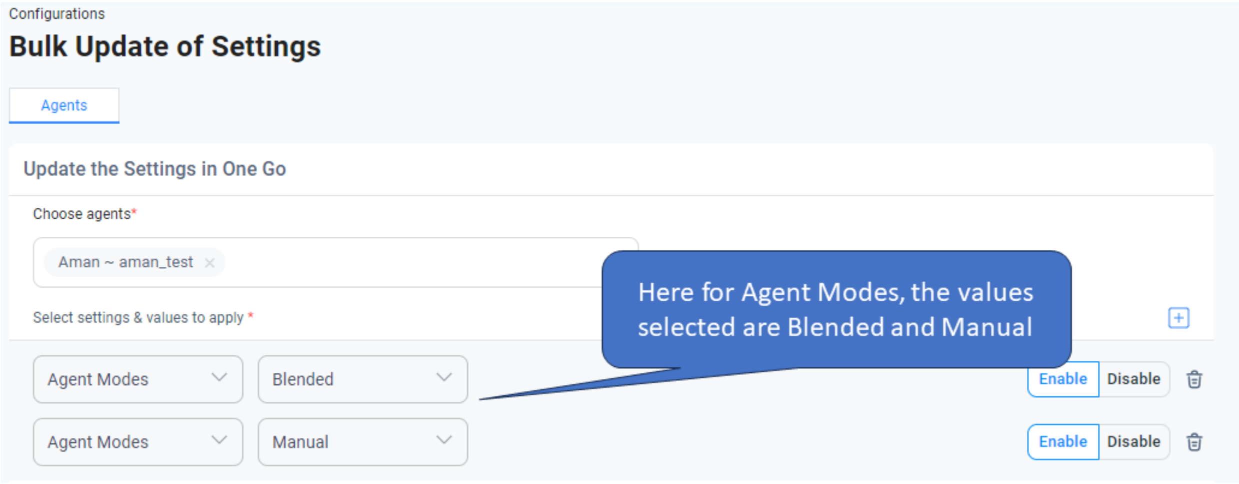
The holiday configuration also applies to API calls. If you attempt to contact a customer on a configured holiday, whether manually or through the following APIs, the call will not be made:

- Agent Manual Dial
- Phone Manual Dial

Bulk Update

This feature allows you to manage agent settings in bulk, making it easier to update multiple agents at once without needing to edit each one individually. Here's how it works:

1. **Navigate to:** Admin -> Configurations -> Bulk Update.
2. **Select Agents:** Choose the agents you want to update. You can select multiple agents simultaneously.
3. **Choose Settings:** Select the settings you want to apply and specify the corresponding value. For example, for "Agent Mode," you might select "Blended."



4. **Add Multiple Settings:** Click the Add (+) button to include additional settings.
5. **Enable/Disable Settings:** Each setting can be toggled on or off as needed.

Settings

Admin Settings

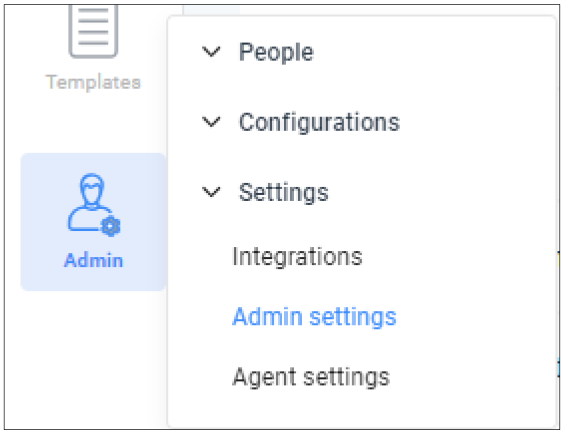
Introduction

The Admin Settings section deals with different configurations that administrators can manage. This involves Account-level settings, General settings accessible to account-level administrators or supervisors, and Integration settings.

Accessing the settings

Here's how you can reach the admin settings page.

- Login to the CloudAgent as an Admin.
- Navigate to Admin > Settings > Admin settings.



Account Settings

Edit User

This section of the admin settings is used to modify or update your account profile. This includes:

- Name
- Username
- Email
- API key
- Phone Number

System Settings

1. Display CRM in
    - i. Embed: This shows the Screen Pop inside a frame on the same page.
    - ii. Pop-up: This opens the Screen Pop in a new window.
    - iii. Open in New Tab: This opens the Screen Pop in a new tab.
2. Callback Url: Modify or add the callback URL here

General Settings

This part gives you, as an admin, the power to control and manage your account using the given settings. In this section, you'll discover different things you can handle as an admin. Details of each setting are explained below

Parameter	Description
EMAIL_ALERTS	Enabling this option will trigger email alerts for administrators.
Callback hit tries	Callback hit attempts to establish connections when sending 'Call details' back to the CRM. This helps in cases where call records fail to transmit due to network issues.
Authentication Token for Plugin	This is used for ZOHO integration.
Send Callback immediately	This function enables the instant sending of 'call details' without including the 'Disposition'. Otherwise, there will be a delay of up to 5 min along with the Disposition.
Sync toolbar if reconnection occurs	This helps when Agent PC has reconnected with internet fluctuation and agent status is back to its earlier status.
Agent Login limit check	Sets the maximum number of agents allowed to log in based on the total number of agents available in your account.
PRI threshold Percentage	Based on the percentage given the PRI report will be generated accordingly
Allow agent toolbar refresh	Allows the agent to refresh the toolbar.
Custom Recording URL	The customer can give his customized URL to push the recordings.
Play Ring on Transfer or Conference	This option gives a response that the call has been transferred.
Machine detection check	This enables AMD detection to work on Autodialers (PROGRESSIVE/PREDICTIVE CAMPAIGNS)
BargeIn Type	There are 2 types of BargeIn SIP = Automatically call will get barged in through Webrtc Normal = Admin has to enter a number manually to BargeIn
Contact Manager Field Count	This setting determines the maximum number of fields that can be added to the contact manager.
Authorise data access	The customer should enable this option to access the data.

Parameter	Description
Play disclaimer on manual call	When making manual calls, a pre-defined disclaimer audio will be played. Provide the URL of the audio file to be used.
WhatsApp DIDs	In this setting, add the list of WhatsApp DIDs for your account.
Agent Creation Limit	This setting restricts the number of agents that can be created for the account. Input the desired numerical value for the agent creation limit.
Allowed IPs for APIs	This setting enables super admins to specify a list of authorized IP addresses through which CloudAgent APIs can be accessible. Any incoming API requests from IP addresses that are not included in the whitelist will be denied, effectively preventing unauthorized access attempts.
Sub User Creation Limit	This setting allows you, as an admin, to specify the number of sub-admin creation limits. Here are some key points to note: - If the limit is set to 0 (zero), you won't see the "Add Sub-Admin" button. - If the value is set to -1, it means there is no limit for sub-admin creation (unlimited).
Phone Number Creation Limit	This setting empowers the super admin to establish a restriction on the number of offline agents. When the set limit is reached, no additional offline agents (phone numbers) can be added until the super admin adjusts the limit.
Allow internal Calling for Agent	This setting enables agents to make agent-to-agent calls. To enable this feature, please review the following considerations: 1. When setting up the inbound campaign, mark the 'Internal Calling' checkbox in the configuration. 2. Ensure to use of an appropriate DID for the campaign. There should be a dedicated campaign for internal calling. 3. Once the campaign is established, the available agents will be visible on the agent toolbar. 4. Note that the second agent receiving the call will **not** have access to call controls. 5. Note that there will be a single UCID record in the CDR. Consider using the disposition to facilitate easy identification of call reports.
Dynamic DID for Campaign	Enable this setting, then only the dynamic DID feature works for your account.

Parameter	Description
Exception Calls Allowed per Agent	Specify the maximum number of consecutive unanswered calls per agent. If an agent misses this set number of consecutive calls, their status changes to "EXCEPTION," reflecting the same status on the dashboard.
Outbound Dialing rule On	**None:** Choose this option if you wish to deactivate the maximum outbound dialing limit for a number within your account. **Account:** Select this option to enable the maximum dialing limit for a number across your entire account. **Campaign:** Activates the maximum daily dialing limit for a number at the campaign level. For more details on how the dialing limit works, refer to the Rules Management article.
Max outbound dialing count	"Max Outbound Dialing Count" allows the admin to set the maximum number of outbound dialing attempts for a number at the account level.
Reporting CDR date range to 60 days	This option enables the customer to filter CDR for 60 days (by default it is 30 days).
Allow Regular Login for SSO	If Single Sign-On (SSO) encounters any issues, the system permits regular login using a username and password as an alternative.
Call Disposition Comment Preference	This setting allows the admin to enable or disable the mandatory preference for comments when disposing of a call. The available options include: **Mandatory:** Select this option to require agents to provide comments when disposing of a call. **Optional:** Choose this option to make the comment field non-mandatory when disposing of a call.
Show Customer Number from Last N numbers	This setting allows you to hide the customer number on the agent toolbar. If you set the value to 4, only the last four digits of the customer number will be displayed to the agent.

Integration Settings

Here are the settings for each integration along with their descriptions.

1. **FreshSales:**
    i. FreshSales Truncate Caller ID:
    ii. Freshsales Search format type: This setting allows you to choose the format for phone numbers in the CRM. By default, the format is set to -1, meaning no specific format is applied. You can select from the following options: International, National, or Telco.
        a. International - Example: +91 xxxxxxxxxx
        b. National - Example: 099xxxxxxxx

c. Telco - whatever number format is passed by the Telecom operator to the system.

2. **Freshworks:**

   i. Truncate Caller ID:

3. **FreshWorks Ticket Fields:**

Parameter	Description	Return Type	Size
callerId	Customer mobile number mapped by phone field	String	255
callType	Call type whether it is an Inbound, Manual, Preview, Progressive, etc.,	String	20
ucid	Unique caller ID used for monitoring call details	BigInt	20
monitorUcid	Unique caller ID used for monitoring transfer call details	BigInt	20
did	DID is a predefined number in campaign through which Agent calls route.	String	30
campaignName	Name of the campaign through which the call is routed	String	255
skillName	Name of the skill through which the call is routed	String	255
uui	User to User call information	String	500
callStatus	Status whether customer Answered or Unanswered the call	String	50
agentId	Agent Login ID	String	255
agentNumber	Phone number with which Agent is logged in	String	20
callStartTime	Time at which the call has started	Time	HH:MM:SS
callEndTime	Time at which the call has ended	Time	HH:MM:SS
audioFile	Recording file link of that particular call	String	http://recordings.xxx/xxx/xxx.mp3
duration	Duration of that particular call	Time	HH:MM:

Parameter	Description	Return Type	Size
			SS
disposition	Disposition set by customer in ACW(after call work) mode	String	100
dispositionDescription			
Create Freshdesk Ticket On	New Call / Agent Answered		
Freshworks Search format type	You can choose the format for phone numbers in the CRM. Default value is set to -1, meaning no specific format is applied. You can select from the following options: International, National, or Telco.		

4. **SalesForce:**

Parameter	Description
Phone Feild ID	
IS_SAVE_LOG	
Log Each Call as	
Log Associate To	
Recording URL	
Associate2ActivePage	
ScreenPop Type	
Salesforce OAuth Client Id	
Salesforce OAuth Client Secret	

5. **SalesForce Task Fields:**

Paramater	Description	Return Type	Size
callerId	Customer Phone number	String	255

Paramater	Description	Return Type	Size
ucid	Unique caller ID used for monitoring call details	BigInt	20
monitorUcid	Unique caller ID used for monitoring call details	BigInt	20
did	DID is a predefined number in campaign through which Agent calls route.	String	30
campaignName	Name of the campaign through which the call is routed	String	255
skillName	Name of the skill through which the call is routed	String	255
uui	User to User call information	String	500
callStatus	Status whether customer Answered or Unanswered the call	String	50
agentId	Agent Login ID	String	255
agentNumber	Phone number with which Agent is logged in	String	20
callStartTime	Time at which the call has started	Time	HH:MM:SS
callEndTime	Time at which the call has ended	Time	HH:MM:SS
duration	Total call duration	Time	HH:MM:SS
disposition	Disposition set by customer in ACW(after call work) mode	String	100
dispositionDescription			
agentStatus	Status of the Agent	String	50
Enable Click2Call			
Enable search for click2call			
DateTime For salesforce call fields			

Paramater	Description	Return Type	Size
Salesforce OAuth Client Id			
Salesforce OAuth Client Secret			
Allow Refresh after call log creation or updation			
transferType	Determines whether the transfer is done to a skill, campaign, IVR, or to an agent		
transferTo	Shows the agent who has received the call after the transfer		

6. Kapdesk:
    i. KAPDESK_DOMAIN:
7. SIP Settings:
    i. WebRTC Call Drop sound
8. Zendesk:

Parameter	Description
Create Ticket	
Value of UUI is	
Create Ticket on	

Zendesk Ticket Fields	Description
callerId	
callType	
ucid	
monitorUcid	

Zendesk Ticket Fields	Description
did	
campaignName	
skillName	
uui	
callStatus	
agentId	
agentNumber	
callStartTime	
callEndTime	
audioFile	
duration	
Zendesk Search format type	You can choose the format for phone numbers in the CRM. The default value is set to -1, meaning no specific format is applied. You can select from the following options: International, National, or Telco.

9. Dynamics365
   i. Dynamics 365 Search format type: You can choose the format for phone numbers in the CRM. The default value is set to -1, meaning no specific format is applied. You can select from the following options: International, National, or Telco.
10. AgileCRM:

Parameter	Description
User Name	CloudAgent Username
API Key	Available in CloudAgent admin login
Domain	

11. Alerts:

Parameter	Description
Busy Threshold (secs)	Alerts if Agent's status is busy time is more than the set threshold time
ACW Threshold(secs)	Alerts if Agent's status is ACW more than the set threshold time
Queue Threshold(secs)	Alerts if calls are in queue more than the set threshold time
Dialler Pending Data Threshold Count	

12. Email Settings:

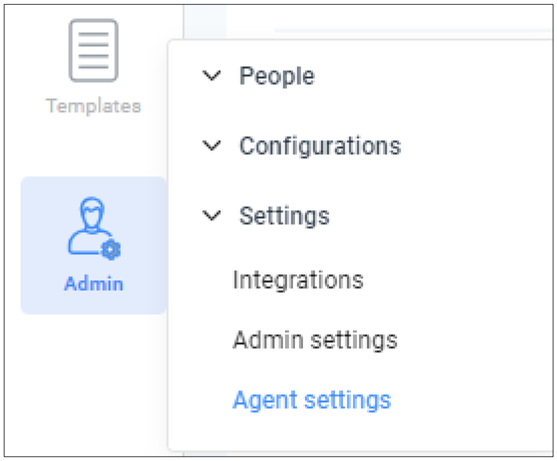
Parameter	Description
From Email	Recipient's username
Subject	Email subject

Agent Settings

CloudAgent provides a set of agent settings to provide the administrators with the tools to configure and manage the contact center effectively. These agent settings allow administrators to customize various aspects of the system, and define user roles and permissions for the agents.

Accessing the settings

- Login to the CloudAgent as an Admin
- Click on the Agent Settings under Settings in the Admin tab as shown below



Key Settings

Below are the settings available and their descriptions

Settings	Description
Customer Information Display On Call	When using Progressive or Preview dialers, agents will have access to customer information uploaded by the admin in the dialer.
Agent Force Logoff Alert	This setting notifies agents when they are forcefully logged off by the admin from the admin dashboard.
Agent Force Release Alert	This setting notifies agents when they are forcefully released by the admin from the admin dashboard.
Agent Call Alert	Agents receive notifications when a call is being initiated on their screen.
Callback Alert	If the agent has set a manual call back, chrome notification shows an alert 5 minutes before the callback.
Parameter to send Agent ID	Product will pass agent details during the "Screenpop" hit when a call is triggered. This is used if CRM needs to get a few parameters from the contact center to the CRM application so that CRM will use these parameters directly for its internal use.
Parameter to send Agent Key	Used in screen pop URL based on setting “Send Custom Params in CRM”
parameter to send Username	Used in screen pop URL based on setting “Send Custom Params in CRM”
parameter to send the agent logged in Phone Number	Used in screen pop URL based on setting “Send Custom Params in CRM”
Send Custom Params in CRM	This is checkmarked for the above fields to enable to CRM.
Send Sms	This setting enables SMS functionality on the agent toolbar.
sms url	If the customer procures SMS API from us, these are used to configure the application URL. Format: Get Request,

Settings	Description
	http://yourdomainURL.com/outbound/outbound_sms.php?phone_no={0}&api_key=KKxxxx&message={1}&from=+15xxxxxx
check If Number Blocked	Can block the numbers for any incoming calls to DID. This helps to check internally if the number is blocked.
Hide customer phone no. in agent toolbar.	This setting hides the customer number on the agent screen during the call.
Group Dispositions	Display the disposition on the agent screen with one drop-down. Ex: Sales**Enquiry; Sales**call etc.., If Agent clicks on Sales, it shows Enquiry & Call in drop down. This is just for viewing purposes. In reports, it comes in a single column. There is no separate column.
Agent to Keep Alive	Agents remain active upon reconnecting to the internet.
Agent force release by himself.	An agent can release himself from his toolbar -- Top right corner, dropdown on agent's ID --> agent can view the "Force Release" button.
ScreenPop Send callerId param only	This is used to send only "Caller number" to CRM Application when a call is initiated Contact center hits to Screenpop URL, which is configured in a Campaign.
Drop me delay time	"DropMe" button can be delayed to display on Agent screen when a call is answered by the Agent.
Agent login allowed IPs	Administrator can decide if they want to restrict agent login locations to specific static IPs only
Inbound Call Queue Alert	If an Incoming call is in Queue, an alert is sent to Agent who are in different mode. (Busy mode etc..,)
Disposition Hide	Disposition can be hidden on the agent toolbar when a call is successfully connected on his screen.
Enable IVR transfer to agent.	This option enables IVR transfer on Agent side
Transfer Skill URL	Customized skill transfer URL
Auto release	Agents will be force released to ready state if this feature is enabled. It will work

Settings	Description
agent after pause time exceeds	only if time limit is set for the pause reasons.
Allow agent to change password	This enables agents to change passwords for their logins.
Allow Transfer in Progressive/Predictive	This enables the transfer feature in auto dialers
Agent Desktop Alerts	This is helpful for agents on windows OS
Agent to Enable or Disable Transfer Call Recording	If enabled the agent can record the call when there is a transfer
Enable agent script	While the admin might have given the script in campaigns, unless this checkbox is enabled, agent will not see the script in his agent login
Customer Call Record Enable or Disable	This checkbox enables the agent to stop or start the audio recording while on a call with customer. This helps meet PCI compliance so agent can stop recording when collecting credit card information from customers.
MultiLevel Disposition	Enables agents select 2 levels of dispositions while in ACW instead of 1 dropdown. This reduces agent productivity though, so use this feature sparingly.
Skip Preview Number	This setting enables either to skip or dial the number in the Preview dialer.
Dont Close ScreenPop	If screenpop is opening in a new window, then enabling this feature won’t close it after call completion so the agent can continue his activity on call.
Close Preview Number	This setting enables either to close or dial the number in the Preview dialer.
Close Preview Number Dispositions	Disposition reason for Close preview number.
Enable Virtual KeyBoard	This setting enables a virtual keyboard for chat.

Settings	Description
Chat Auto Answer	Agent can decide on accepting the chat.
Hide Audio in toolbar call history	Customer can choose if the agent can view the audio link on call history on agent panel.
Allow WhatsApp outbound	If enabled Agents can send outbound messages through WhatsApp
WhatsApp URL	Configuring WhatsApp to send outbound messages
Smart Reply	If enabled agents can choose chat templates (predefined text messages)
Toolbar CallerID international format	Caller ID will be in international format.
Allow Skill Transfer on Agent Panel	This option enables Skill transfer on Agent panel.
Allow Phone Transfer on Agent Panel	This option enables phone transfer on Agent panel.
Allow Agent Transfer on Agent Panel	This option enables agent transfer.
Agent toolbar Default tab	Customers can choose the default tab for the agent panel.
Dashboard	Agents can see a live dashboard with call status and agent status if enabled
Auto Logout on Pause Timeout	Agent will be logged out from the toolbar with the time configured
Auto logout IDLE agent in Mins	Specify the time duration, in minutes, to automatically log out the agent once their idle time limit is reached. Set the time as 0 or -1 to disable this setting and allow unlimited idle time.
Auto logout	Specify the time duration, in minutes, to automatically log out the agent once the

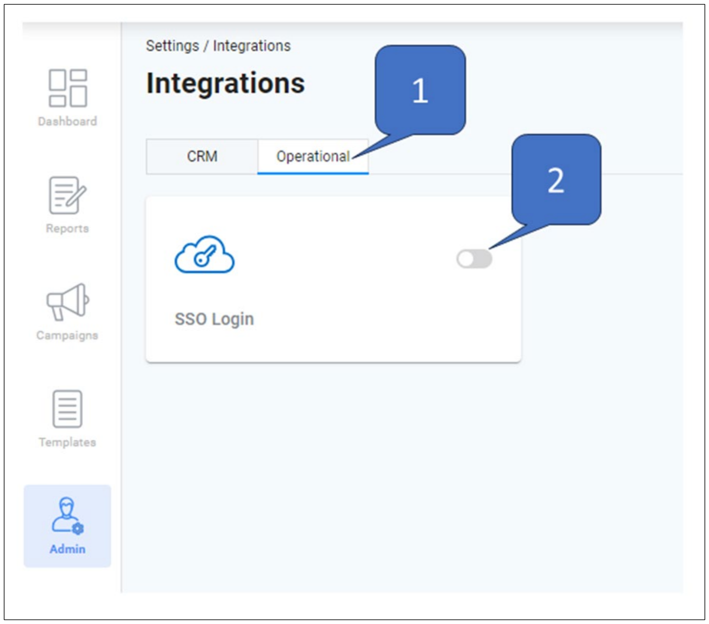
Settings	Description
PAUSED agent in Mins	configured pause time is reached. Set the time as 0 or -1 to disable this setting and allow unlimited pause time.
Agent Screen Recording by UCID	This setting enables to recording the agents' screens for all the connected calls handled by the agent (by UCID)
Sms DIDs List	With this setting, the Super Admin can configure the DIDs and their corresponding vendors. Agents can then choose the DID from which SMS messages should be sent using the agent toolbar. (Please note that this feature is currently not applicable to customers in India).

Integrations

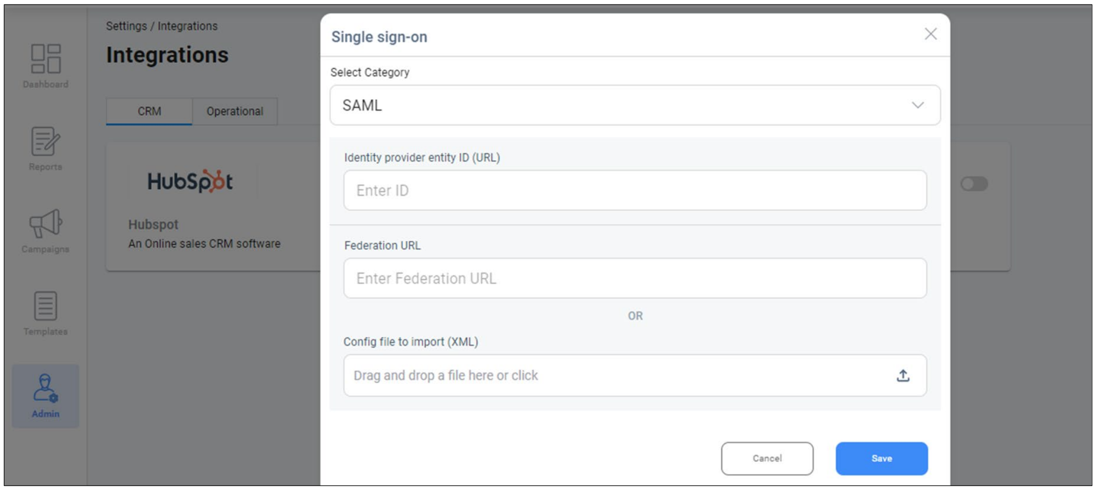
SSO Configuration

As an admin, you can enable SSO (Single Sign-On) login for your account. To set it up, follow these steps:

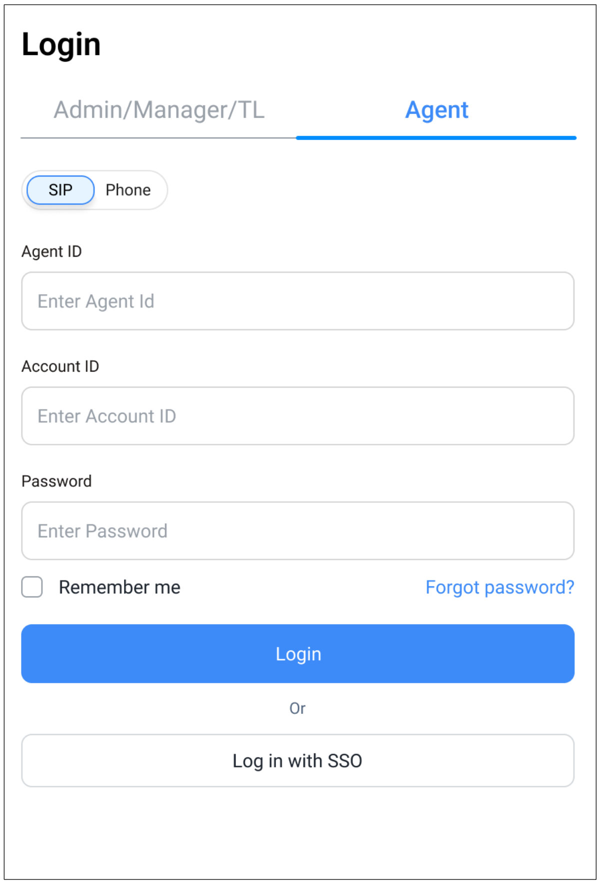
1. Go to Admin -> Settings -> Integrations, and navigate to the Operational tab. Enable the SSO login option.



2. Complete the required fields in the form that appears.



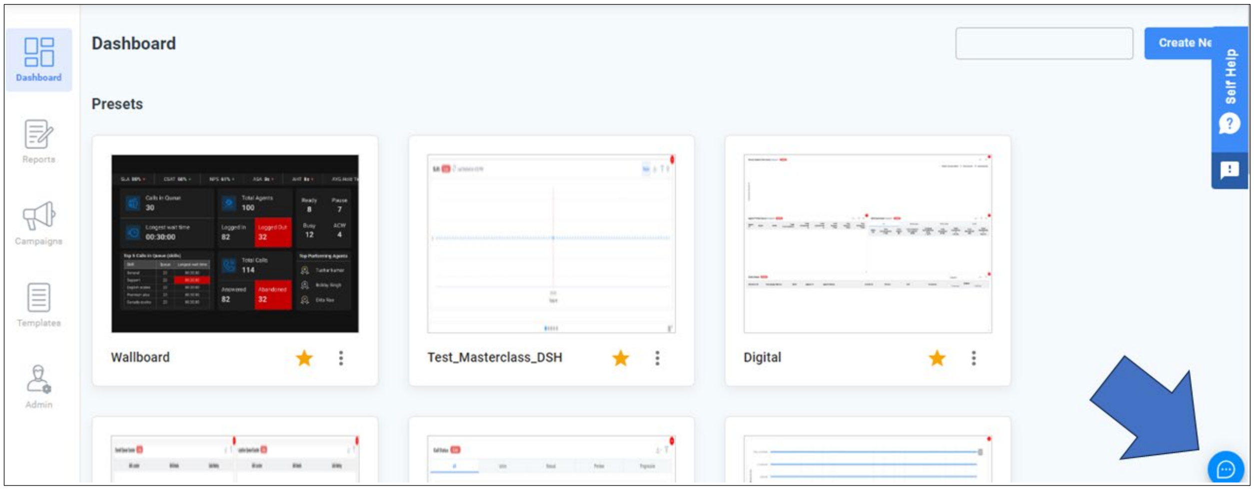
3. After saving the configuration, agents will have the option to log in using either the standard CloudAgent login or SSO login.



Broadcast Messaging

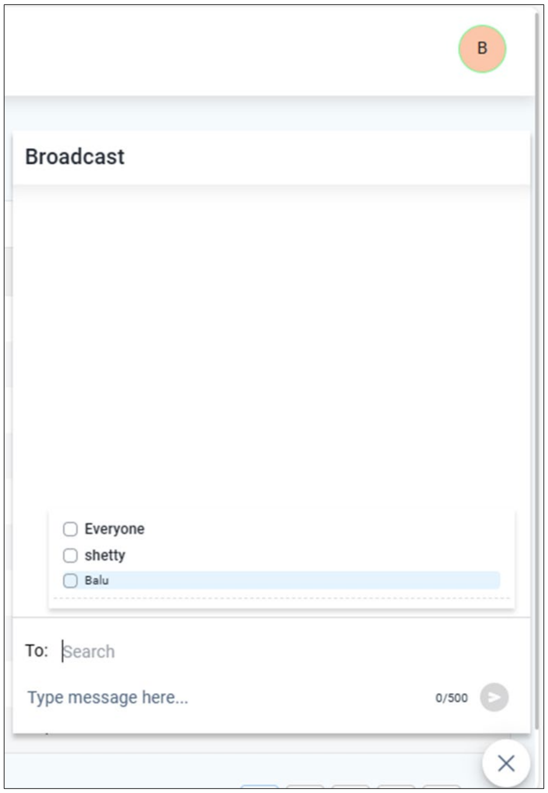
The Broadcast Messaging feature allows supervisors to send important notifications directly to agents' toolbars, ensuring timely and efficient communication.

The Broadcast Messaging icon is located on the right bottom of the admin login page.



Below are the key functionalities and details of this feature:

- Broadcast messages appear in the notification icon on the Agent toolbar login page, ensuring visibility.
- Supervisors can send broadcast messages to individual agents, multiple agents, agent groups, or a combination of these.



- Supervisors can view the current day's broadcast message history for individuals or groups.

- The "Seen By" option shows which agents have viewed the broadcast message.
- Clicking an agent or group name in the message history auto-populates the recipient field.
- Supervisors can resend messages to previous recipients with a single click.

Logout

The Administrator can log out from the portal using the Logout option in the top right corner and it is considered a best practice to follow after completing your work.