

Welcome to Deskforce Dialer

Manager Dashboard

Real Time Report

Settings

BI Tools

Autodial level

Campaign

Users

Groups Assignment

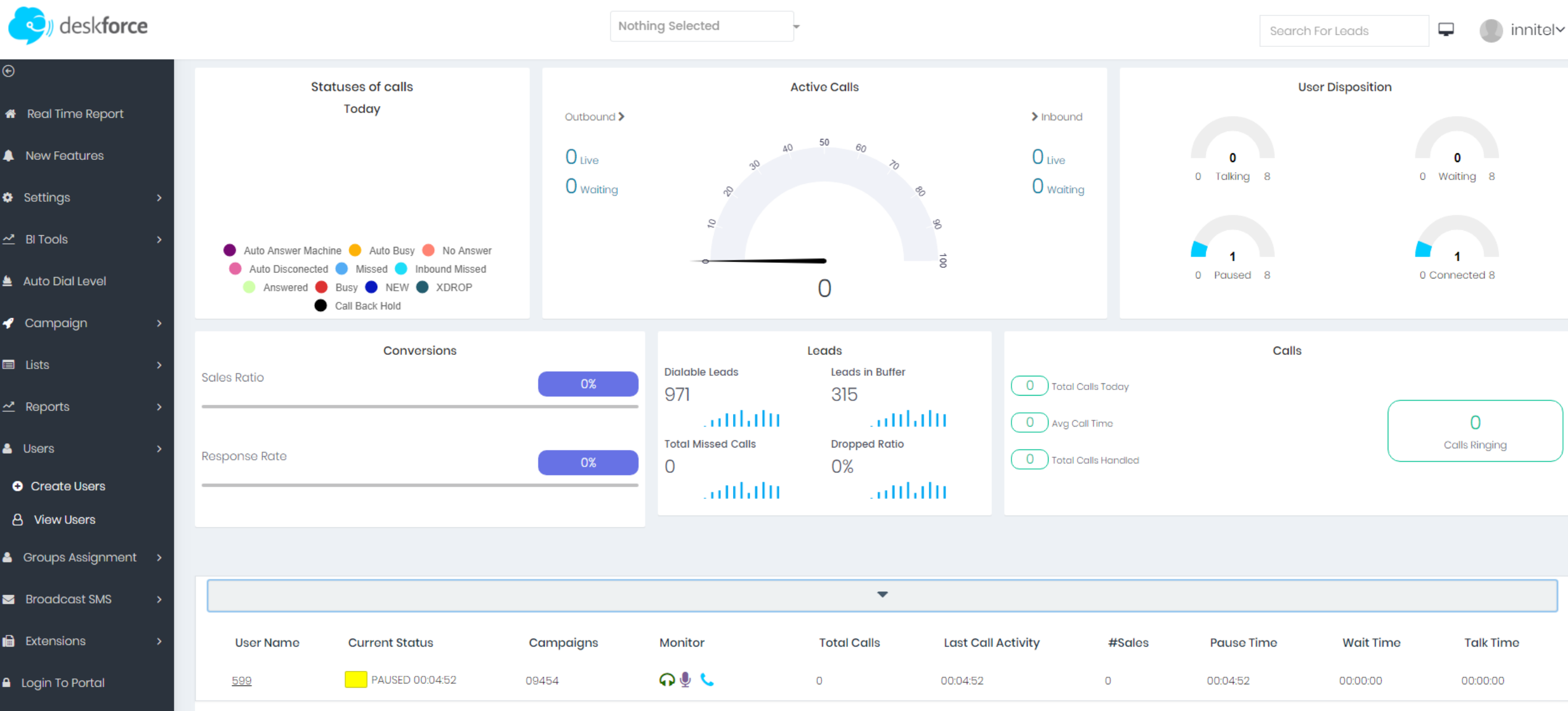
Extensions

Reports

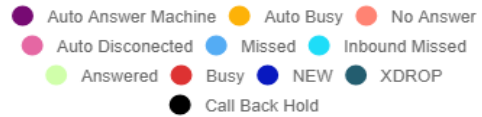
Lists

Agent Dashboard

Manager dashboard – Real Time Report



Statuses of calls Today

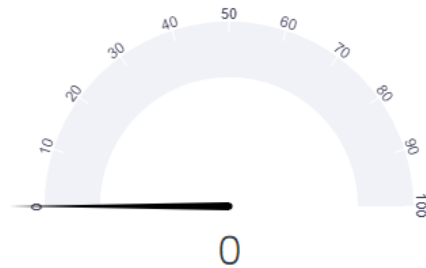


These are statuses that agents choose after finishing the call

Active Calls

Outbound >

0 Live
0 Waiting

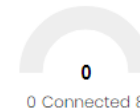
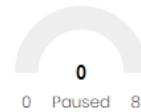
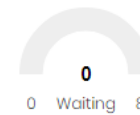
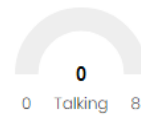


> Inbound

0 Live
0 Waiting

These are all active inbound and outbound calls. You see how many agents are in a call and waiting for a call

User Disposition

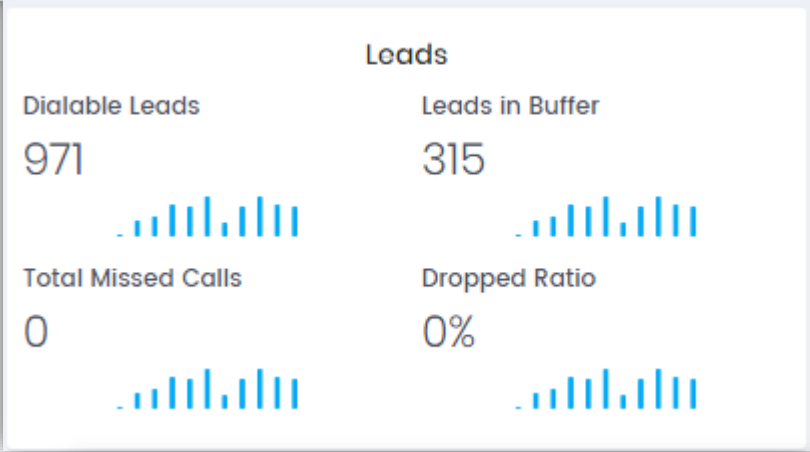


You are able to see how many agents are talking, waiting for a call, are in a pause and connected agents

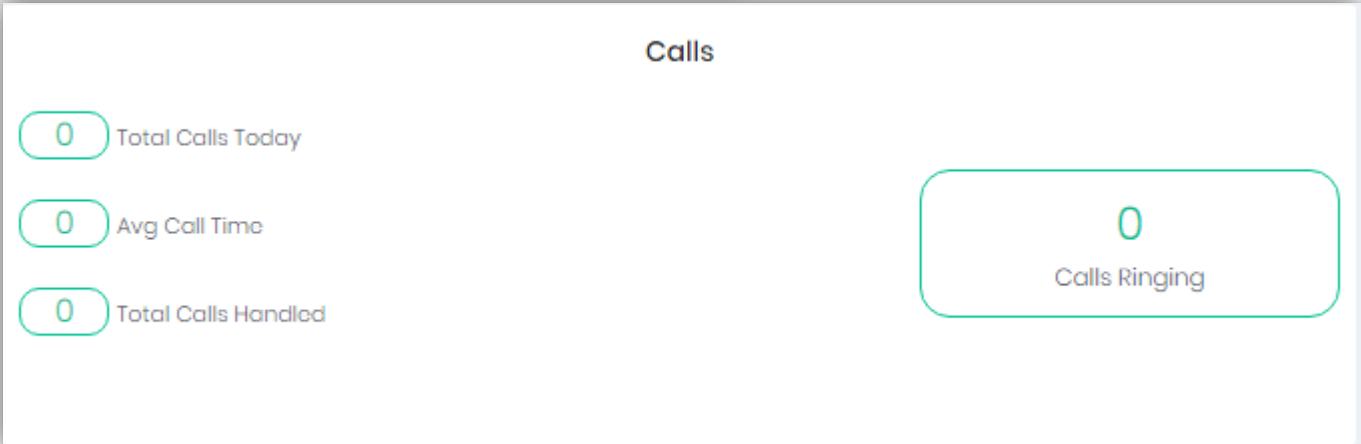


Sales Ratio is the percentage of all calls finished with a sale compared to all calls

Response Rate is the percentage of all responded calls compared to all calls



Dialable leads are all leads in a certain campaign
Leads in Buffer are all leads in a certain campaign who are waiting to be called
Total Missed calls are dropped calls. Calls can be dropped for some reasons: voice mails, busy signals, the client hang up the phone, the client picked up the phone but there is no available agent to handle the call
Dropped ratio is the percentage of all missed calls compared to all handled calls



You see the total calls today, the average call time and total calls handled. The last one means all calls that are answered.

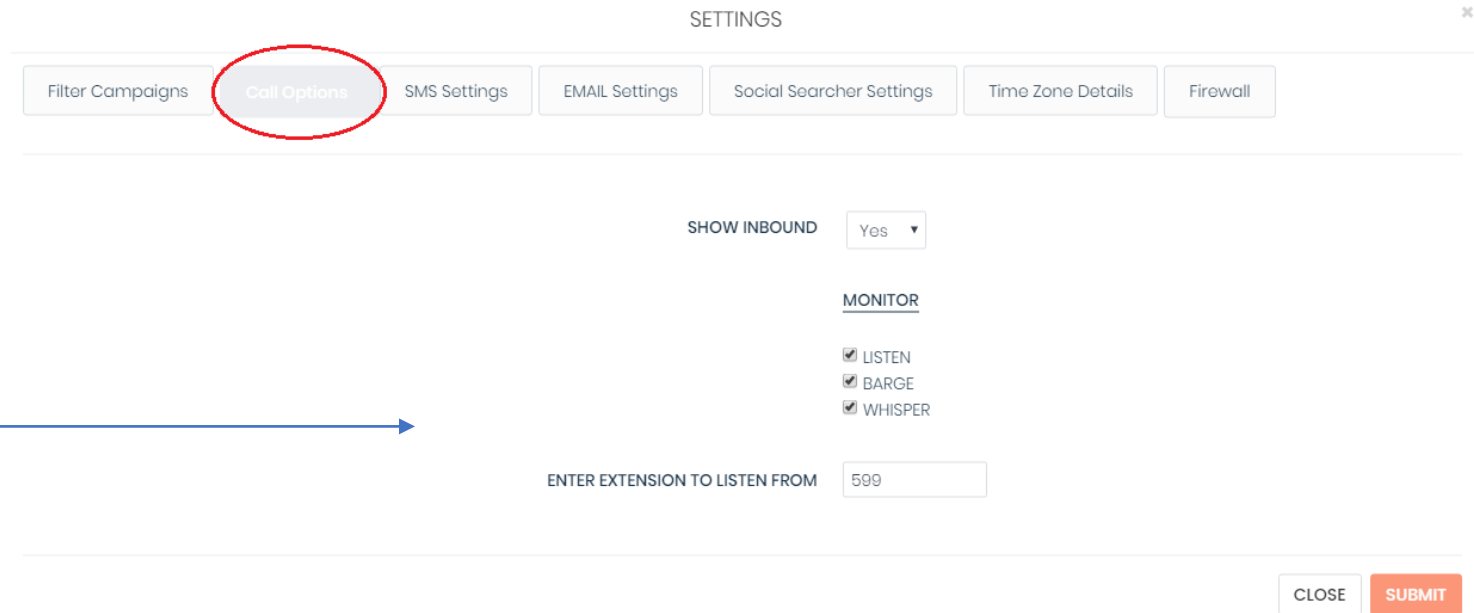
You can choose what information to be displayed for your agents on the dashboard – you need to tick the field you want to be displayed

<input checked="" type="checkbox"/> Users	<input type="checkbox"/> Extention	<input checked="" type="checkbox"/> Current Status	<input checked="" type="checkbox"/> Campaigns	<input type="checkbox"/> Lead Phone	<input checked="" type="checkbox"/> Monitor	<input checked="" type="checkbox"/> Total Calls	<input checked="" type="checkbox"/> User Name
<input checked="" type="checkbox"/> Last Call Activity	<input checked="" type="checkbox"/> #Sales	<input checked="" type="checkbox"/> User Group	<input checked="" type="checkbox"/> Pause Time	<input checked="" type="checkbox"/> Wait Time	<input checked="" type="checkbox"/> Talk Time	<input type="checkbox"/> Dispo Time	<input type="checkbox"/> Dead Time
				<input type="checkbox"/> Logged in Time			
					<div>UNSELECT ALL</div>	<div>SELECT ALL</div>	
<div><div></div>Paused < 5 minutes</div>		<div><div></div>Waiting for call < 5 minutes</div>		<div><div></div>Outbound Call < 5 minutes</div>	<div><div></div>Inbound Call < 5 minutes</div>	<div><div></div>Dispo < 5 minutes</div>	<div><div></div>Dead call < 5 minutes</div>
<div><div></div>Paused > 5 minutes</div>		<div><div></div>Waiting for call > 5 minutes</div>		<div><div></div>Outbound Call > 5 minutes</div>	<div><div></div>Inbound Call > 5 minutes</div>	<div><div></div>Dispo > 5 minutes</div>	<div><div></div>Dead call > 5 minutes</div>

↑ User	User Name	Current Status	User Group	Campaigns	Monitor	Total Calls	Last Call Activity	#Sales	Pause Time	Wait Time	Talk Time
<u>502</u>	<u>Moses</u>	<div><div></div>PAUSED 00:04:50</div>	AGENTS	09454		0	00:04:50	0	00:04:50	00:00:00	00:00:00
<u>599</u>	<u>599</u>	<div><div></div>PAUSED 01:15:49</div>	AGENTS	09454		0	01:15:49	0	01:15:49	00:00:00	00:00:00

Monitoring an agent

From “Settings” you choose “Call Options”, then mark the option you want to be displayed on the dashboard. The last step is to type the number of your extension which you want to monitor your agent from and then select “Submit”. After all these be done you need to go to your dashboard and choose the agent you want to monitor, then select the option for monitoring



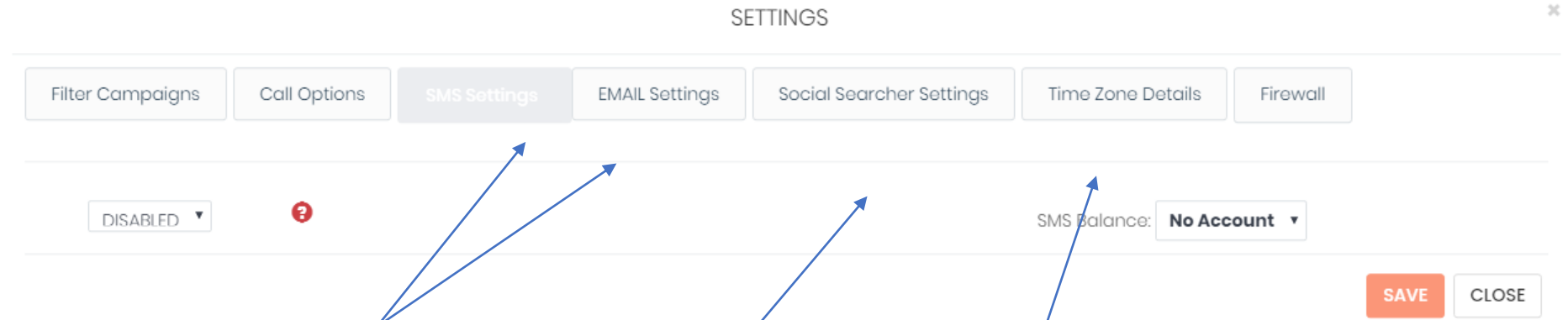
The screenshot shows a 'SETTINGS' interface with a top navigation bar containing buttons for 'Filter Campaigns', 'Call Options' (highlighted with a red circle), 'SMS Settings', 'EMAIL Settings', 'Social Searcher Settings', 'Time Zone Details', and 'Firewall'. Below this, the 'SHOW INBOUND' dropdown is set to 'Yes'. The 'MONITOR' section has three checked options: 'LISTEN', 'BARGE', and 'WHISPER'. At the bottom, the 'ENTER EXTENSION TO LISTEN FROM' field contains the number '599'. 'CLOSE' and 'SUBMIT' buttons are at the bottom right. A blue arrow points from the text on the left to the 'MONITOR' section.

You have three options:

Listen – or spy, the manager has an option to listen the conversation between the lead and the agent

Barge – to join the conversation to have a conference call

Whisper – it is a conversation between you and your agent while your agent is talking to the client. The client can't hear you.



You have **SMS and Email settings**. Your agents can send SMS or email to the clients during or after finishing the conversation

You can search information for your lead in the social channels – you need to take the API of your lead for the certain social channel as Facebook for example

You are able to set up the time for your Dialer

NEW FEATURE

Adding IP address

In order to do so please follow the steps below:

1. Go to “Settings”
2. Click on “Firewall”
3. Click on “Add”
4. Fill out the “Description“ and “IP”
5. Click “Save”

SETTINGS

Filter Campaigns

Call Options

SMS Settings

EMAIL Settings

Social Searcher Settings

Time Zone Details

Firewall

IP Settings

History

ADD

Description	Ip	Added by	Added by	Added Time	Added by ip	Action
<input type="text" value="Office1"/>	<input type="text" value="123.456.78.910"/>					<div><div>Save</div><div>Cancel</div></div>

NEW FEATURE

New Business intelligence report for Recordings - to search and listen

If you want to see only certain recordings you can apply some filters
- choose from campaign, status or phone number. You can choose a specific user and choose a certain period of time:

- 1. Go to “BI Tools”
- 2. The window below will appear and filter by your needed criteria
- 3. Select “Refine search”
- 4. Find the recording you want to listen and press “listen” button which is on the bottom on your right

Records

FILTER CALLS

Campaigns

Status

Phone number

Users

System status

Any

Any

Filter by specific phone number

Moses

Any

From

To

2018-05-01 10:16

2018-08-03 10:16

REFINE SEARCH

2 CALLS / 0:00:32 TOTAL TIME

Show 10 entries

Search:

Rec. Id	Date	Campaign	User	Destination	Talk Time	
1669	2018-05-28 13:15:22	France	502	972524116461	0:00:11	LISTEN
1729	2018-07-31 11:34:54	Monaco	502	972542094025	0:00:21	LISTEN

Dial Level – this is a certain number per agent in order to make certain calls at the same time. The dial level is set up by campaign and you can increase or decrease it as per your needs

Follow the steps:

1. Go to Auto Dial Level
2. Select the campaign you want to change the dial level
3. Set auto dial level
4. Press “Submit”

AUTO DIAL LEVEL OPTIONS

Select Campaign

09454 - Monaco

Current Dial level:

0

Set Auto Dial Level:

5

CLOSE

SUBMIT

Campaign

Create campaigns:

- Go to “Campaign”
- Click on “Create campaigns”
- Fill out the fields “Campaign ID” and “Campaign name”
- Choose the campaign that you want to copy from
- Press “Create campaign”

NEW CAMPAIGN

Campaign ID

161616

Campaign Name

Morocco

Copy Campaign Settings



















09454 - Monaco

Active:

No | Yes

CREATE CAMPAIGN

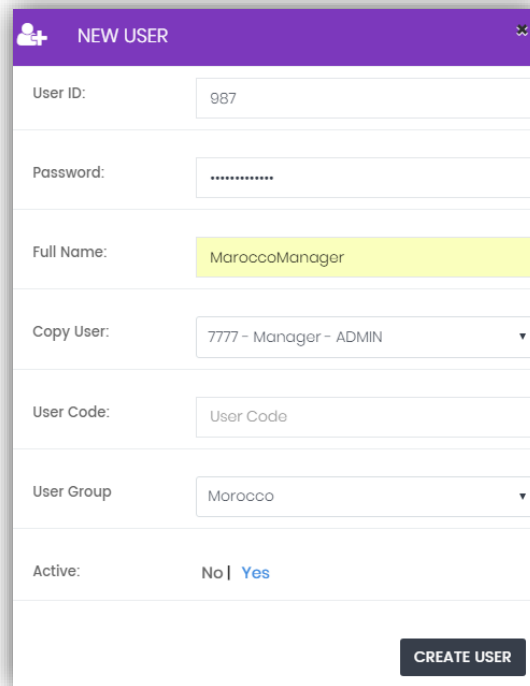
View campaigns – this feature allows you to see all existing campaigns, all active and nonactive ones

CAMPAIGNS LIST												
Campaign ID	Campaigns	Auto Dial Level	Leads In Buffer	Dialable Leads	Avg Wait	Sales Conversion		SMS Totals		Logout All Agents	Total calls	Active
 98758	Africa	0	0	0	0.0000	month	today	month	today		3	
 8959	Australia		0	0	0.0000	month	today	month	today		4	
 78435	France		6	6	0.0000	month	today	month	today		6	
 674543	France	2	4	4	0.0000	month	today	month	today		4	
 4365	Germany		2	2	0.0000	month	today	month	today		3	
 8745	Greece		22	22	0.0000	month	today	month	today		22	

Users

Create users:

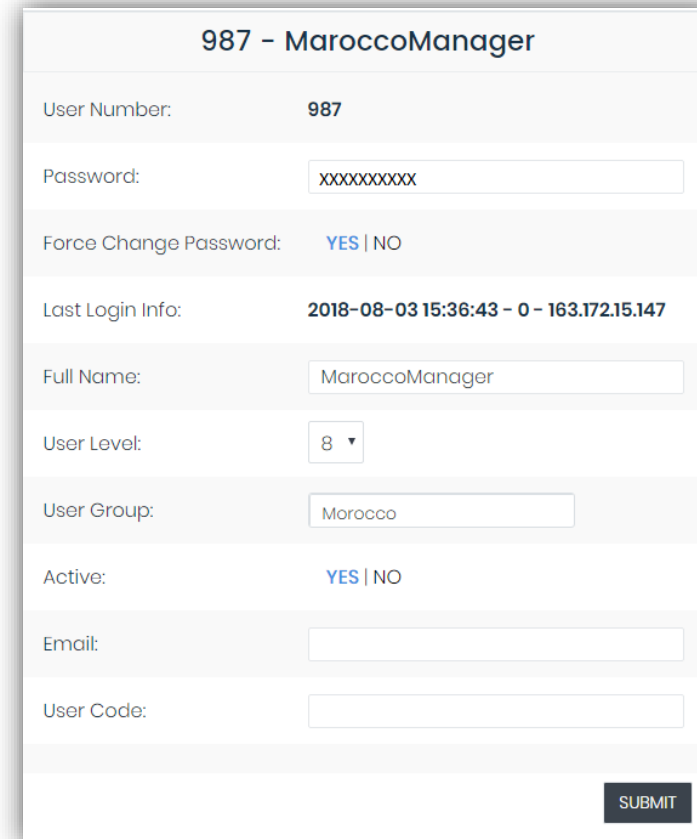
- Go to “Users”
- Go to “Create Users”
- Fill out the requested information
- Press “Create user”



The screenshot shows a 'NEW USER' form with a purple header. The form contains several input fields and a 'CREATE USER' button at the bottom right. The fields are: User ID (987), Password (masked with dots), Full Name (MaroccoManager), Copy User (7777 - Manager - ADMIN), User Code (User Code), User Group (Morocco), and Active (No | Yes).

NEW USER	
User ID:	987
Password:	XXXXXXXXXX
Full Name:	MaroccoManager
Copy User:	7777 - Manager - ADMIN
User Code:	User Code
User Group:	Morocco
Active:	No Yes
CREATE USER	

View users – you are able to see all existing users. You can click on the chosen user and edit the information for him



The screenshot shows a user details page for '987 - MaroccoManager'. The page displays various user information and a 'SUBMIT' button at the bottom right. The fields are: User Number (987), Password (XXXXXXXXXX), Force Change Password (YES | NO), Last Login Info (2018-08-03 15:36:43 - 0 - 163.172.15.147), Full Name (MaroccoManager), User Level (8), User Group (Morocco), Active (YES | NO), Email (empty), and User Code (empty).

987 - MaroccoManager	
User Number:	987
Password:	XXXXXXXXXX
Force Change Password:	YES NO
Last Login Info:	2018-08-03 15:36:43 - 0 - 163.172.15.147
Full Name:	MaroccoManager
User Level:	8
User Group:	Morocco
Active:	YES NO
Email:	
User Code:	
SUBMIT	

Group Assignment –gives permission to a certain manager to see certain groups

- Create user group:
- Go to “Groups Assignment”
 - Type the group name and click on the blue icon
 - Find in this tap the group and activate all groups you want to assign to this manager



Campaigns	Allow
770 - Default Campaign	<input type="checkbox"/>
123123 - Genes DEMO	<input checked="" type="checkbox"/>
1988 - Naftalis Campaign	<input checked="" type="checkbox"/>
101010 - InnitelTest	<input checked="" type="checkbox"/>
99090 - Nir Test	<input type="checkbox"/>
900000 - Test Israel2	<input type="checkbox"/>
89999 - Test Hot	<input type="checkbox"/>
12345678 - Test_Campaign-BG_Office	<input type="checkbox"/>
2033044 - Mugs-Siml	<input type="checkbox"/>
3004005 - IdanMugs-Cold	<input type="checkbox"/>
33000044 - Amadilo Toothpaste	<input type="checkbox"/>
12221 - Elisha	<input type="checkbox"/>
99119911 - Test-Ivan	<input type="checkbox"/>
2017523 - cyprusTest	<input type="checkbox"/>
121212 - NewTtrain	<input type="checkbox"/>
2222 - test123	<input type="checkbox"/>
1234567 - shirshirshir	<input type="checkbox"/>
12385371 - John Doe	<input type="checkbox"/>
123 - test43	<input type="checkbox"/>







GROUPS ASSIGNMENT

ADD GROUP

Group Name:

When the manager go in his dashboard he will see only the groups you permitted him



CAMPAIGNS LIST

Campaign ID	Campaigns	Auto Dial Level	Leads In Buffer	Dialable Leads	Avg Wait	Sales Conversion		SMS Totals		Logout All Agents	Total calls	Active
 123123	Genes DEMO	<div><div></div></div>	0	0	0.0000	month 0	today 0	month 0	today 0		874	<div><div></div></div>
 101010	InnitelTest	<div><div></div></div>	200	856	0.0000	month 0	today 0	month 0	today 0		1,010	<div><div></div></div>
 1988	Naftalis Campaign	<div><div></div></div>	0	0	0.0000	month 0	today 0	month 0	today 0		162	<div><div></div></div>

Extensions

Create extension:

Click on “Create extension” and fill out the needed information

 NEW EXTENSION 

Extension Type:

SIP

?

Extension:

1616


Password:

123456Manager

CREATE EXTENSION

View extensions – you can edit the information for an extension by clicking here

	1616	1616	1616	---ALL---	ACTIVE
--	------	------	------	-----------	--------

 Edit Extension

Extension:

1616

Password:

123456Mana

EDIT EXTENSION

Reports

For campaign reports

- 1.Go to “Reports”
- 2.Go to “Campaign reports”
- 3.You can search by time range and certain campaigns.
- 4.Click on “Submit”
- 5.The data will appear and you can download it in Excel or CSV file

Campaign Reports

2018-04-01 --- 2018-08-01

SUBMIT

CAMPAIGN REPORTS

RESULTS

CAMPAIGNS

SELECT ALL

UNSELECT ALL

All Campaigns X

CALL STATUS STATS



Status	Description	Calls	TOTAL TIME	AVG_TIME	CALLS/HOUR	AGENT CALLS/HOUR
1	Voice Mail	1	0:15	0:15	17.31	12.46
7	Wrong Person	1	3:13	3:13	17.31	12.46
TOTAL:			2	3:28	1:44	34.62

For agent reports

- 1.Go to “Reports”
- 2.Go to “Agents reports”
- 3.You can search by time range.
- 4. Click on “Submit”
- 5.The data will appear and you can download it in Excel or CSV file

Agent Reports



2018-05-01 --- 2018-08-01

SUBMIT

AGENTS SALES REPORTS



Agent Name	Agent ID	Leads	Sales	Sales Per Hour	Sales per Working Hour	Incomplete Sales	Cancelled Sales	Average Sale Time
599	599	2	0	0.00	0.00	0	0	00:00


AGENTS STATS




Agent Name	Agent ID	Calls	Callbacks	Talk Time	NON pause Time
599	599	2	0	0:00	3:45

You can search for recordings by certain campaign, inbound group, list, status or user group for a certain period of time. By clicking on “Download” all the recordings will be downloaded in zip file

Export Recordings

2018-06-01 --- 2018-08-01


DOWNLOAD

Campaigns

SELECT ALL

UNSELECT ALL


Select Campaigns

Inbound Groups

SELECT ALL

UNSELECT ALL


Select Inbound Groups

Lists

SELECT ALL

UNSELECT ALL


Select Lists

Statuses

SELECT ALL

UNSELECT ALL

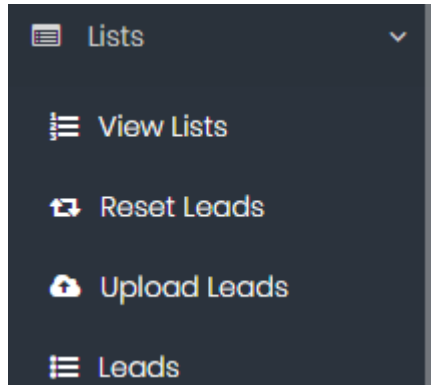
Select Statuses

User Groups

SELECT ALL

UNSELECT ALL

Select User Groups




You can see all list with leads

You can reset list with leads:
1.Go to “Reset leads”
2.Choose the campaign and the list you want to reset
3.Click on “Submit”

You are able to search a lead by lead ID, lead name, email or phone number

A screenshot of the 'RESET LEADS' modal form. It has a title bar with a close button. The form contains three sections: 'Select Campaigns' with a dropdown menu showing '09454 - Monaco'; 'LISTS WITHIN THIS CAMPAIGN:' with a dropdown menu showing '5680 - Morocco'; and a confirmation section 'Are you sure you want to reset leads for this campaign?' with a dropdown menu showing 'Y'. At the bottom right, there are two buttons: 'CLOSE' and 'SUBMIT'.A screenshot of the 'SEARCH FOR LEAD' form. It has a title bar with three tabs: 'LEAD SEARCH', 'LEAD DETAILS', and 'LEAD INFO'. The form contains four input fields: 'Lead ID', 'Lead Name', 'Email', and 'Phone No.'. Below each input field is a green 'SEARCH' button.

Uploading list with leads

- 1. Go to “List”
- 2. Go to “Upload leads”
- 3. Click on “New list”
- 4. Fill out the information in pic.1
- 5. Press “Save list”
- 6. Click on the icon 
- 7. Upload the file
- 8. Press “Next”
- 9. Choose the headers according to your list/pic2/
- 10. Click on “Upload leads”

pic1

X

New List

List ID *

5680

List Name *

Morocco

List Description

Campaigns *

09454 - Monaco

Copy Custom Fields From

NONE

Active

YES | NO

*- required fields

CANCEL

SAVE LIST

GO BACK

DATA MAPPING

UPLOAD LEADS


First 10 Rows


Please Select The Headers For Your Fields

FIRST NAME	PHONE NUMBER	EMAIL	CITY	SELECT FIELD	SELECT FIELD	SELECT FIELD
test	97233761010	test@test.com	Israel			
test2	12122030066	test@test.com	USA			
test3	442036953434	test@test.com	UK			

pic2

Agent Dashboard

 Pause



60: 14 : 23

Manual Dial +













Deskforce

First Name



Deskforce




Last Name




Alt Phone


Phone Code



Title




Address1




Phone Number


972722463700



Address2




Address3




City

Israel




State




Lead Id


326482



Vendor Lead Code



Middle Initial




Sale Script


Refresh

Last Calls

List Of Logs

2018-08-07





Show 10 Entries

Search:

Name	Phone	Type	Date	Comment	Listen	Dial	Status	Inbound / Outbound	Lead Id
No data available in table									

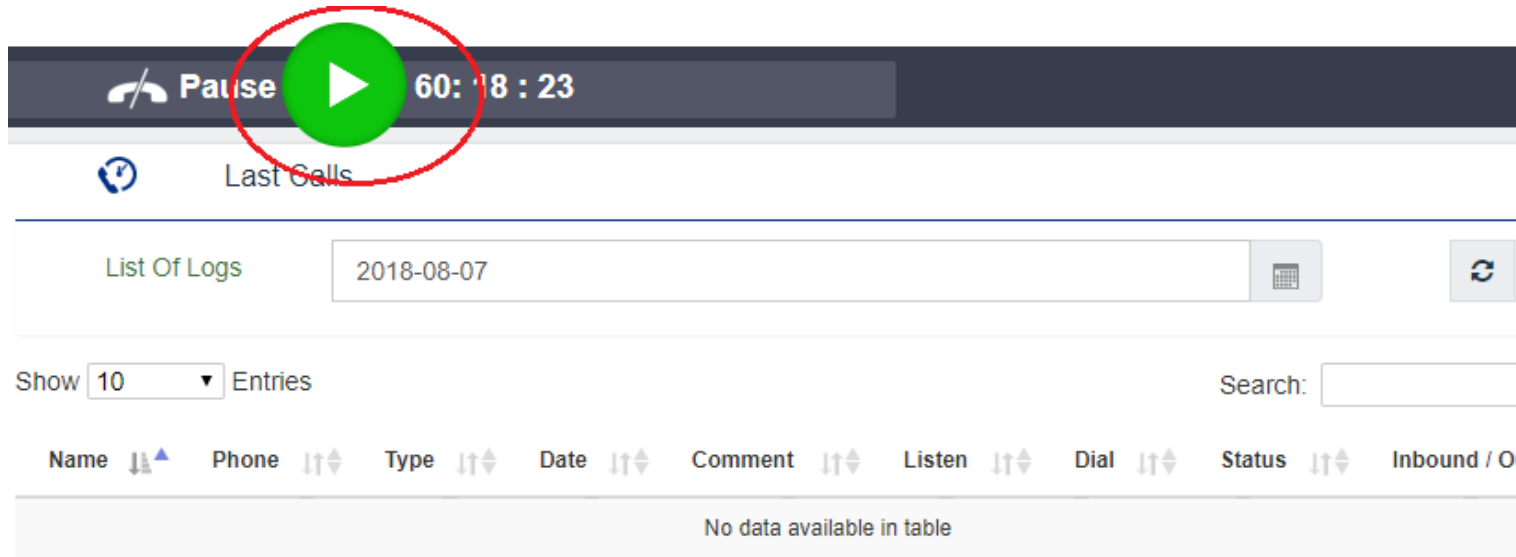
Showing 0 to 0 of 0 entries

PreviousNext

Two possible ways for your agents to make a call

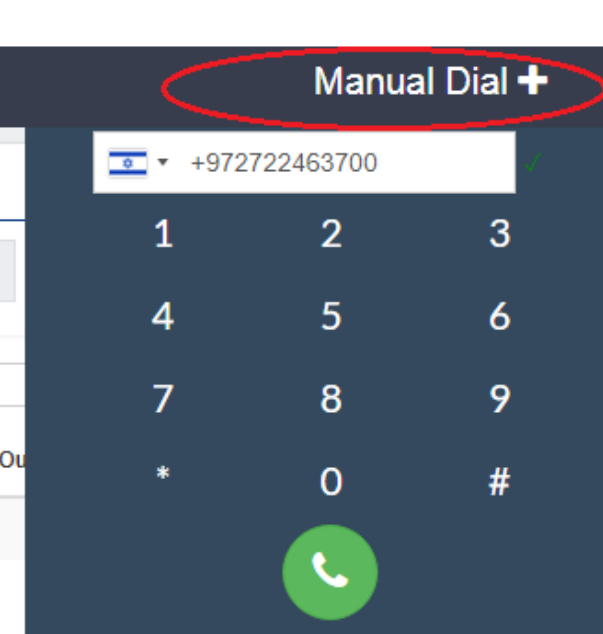
Automatic Dialing

Just by clicking on the green button



Manual Dialing

In the white field, type a number you want to dial and click on the green handset



After finishing the call your agent can fill out the information for the lead, can choose the status of the call and on his right he will see the information for the call

Deskforce

First Name

Deskforce

Last Name

Alt Phone

Phone Code

Title

Address1

Phone Number

972722463700

Address2

Address3

City

Israel

State

Lead Id

326482

Vendor Lead Code

Middle Initial

Gender

M

Postal Code

Please Select A Status For The Call

1 - Voice Mail

2 - General Call Back

3 - Meeting

4 - Sale

5 - Not Interested

6 - Black List

7 - Wrong Person

AGENT DIALING:

ON

SAVE

Last Calls

List Of Logs

Show

10

Entries

Search:

Name	Phone	Type	Date	Listen	Inbound / Outbound
dan leubitz	972526477757	MANUAL	2018-08-02 16:59:59	<div><div></div><div>0:00 / 0:17</div><div></div><div></div><div></div></div>	T

Showing 1 to 1 of 1 entries

Previous

1

Next

Let’s say that the agent put a status” Meeting”. He is able to put a comment and select a date and time for the meeting/pic1/. By clicking on “Submit” this will be saved. If the agent wants to see all appointments he can go in the small menu on his left and click on this icon.



Then all appointments will appear/pic2/. You can choose the call you want to see more detailly/pic3/

Please Select A Status For The Call

1 - Voice Mail

2 - General Call Back

3 - Meeting

4 - Sale

5 - Not Interested

6 - Black List

7 - Wrong Person

Call him in an hour

08/07/2018 1:02 PM

AGENT DIALING: ON

SAVE

pic1

List of Call Backs							
Show 10 Entries		Search:					
Callback Time	Callback Id	Phone Number	Full Name	Lead Id	Comment	Dial	
2018-07-19 15:55:00	1451		test1	303167			
2018-08-07 13:02:00	1452	972722463700	Deskforce	326482	Call him in an hour		

pic2

Edit Lead

Phone

972722463700

First Name

Deskforce

Last Name

Email

Address1

Address2

State

Lead Id

326482

Last Comment

Callback Commnet

Call him in an hour

Last User Called

599

Last Calls

2018-08-07 08:58:41

Last Status Modified

Call Back Hold

Callback Time

2018-08-07 13:02:00

Close

Submit

pic3

The agent has also a calendar with all appointments

Month

Week

Day

<< Prev

Today

Next >>

August 2018

Sunday

Monday

Tuesday

Wednesday

Thursday

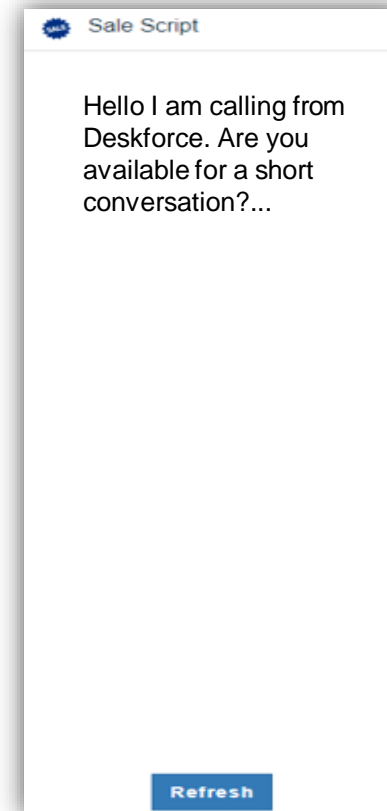
Friday

Saturday

29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

NEW FEATURE

Sale script: Admin can now build his own sale script per campaign



How the agent choose the status when he wants to have a rest

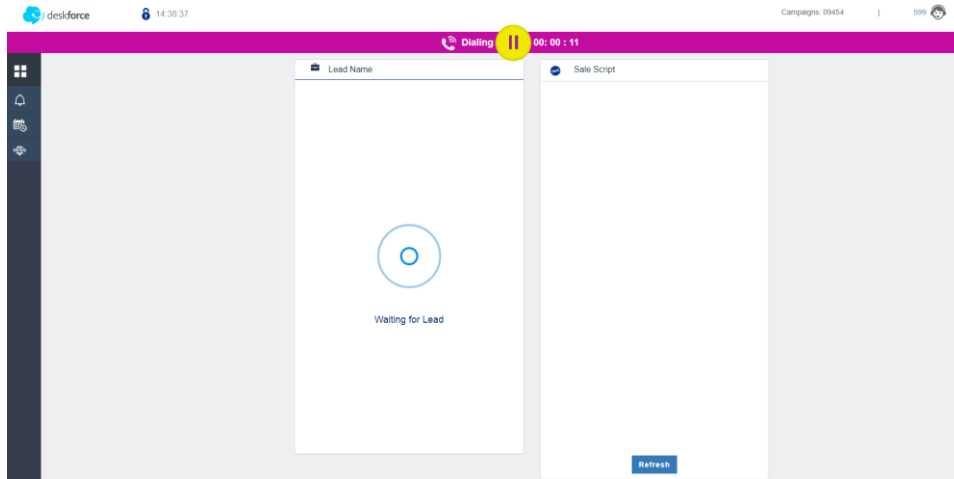
When the agent is dialing automatically what he sees is in pic1.

When he wants to have a pause he should press the yellow button and automatically appears the pop up menu in pic2.

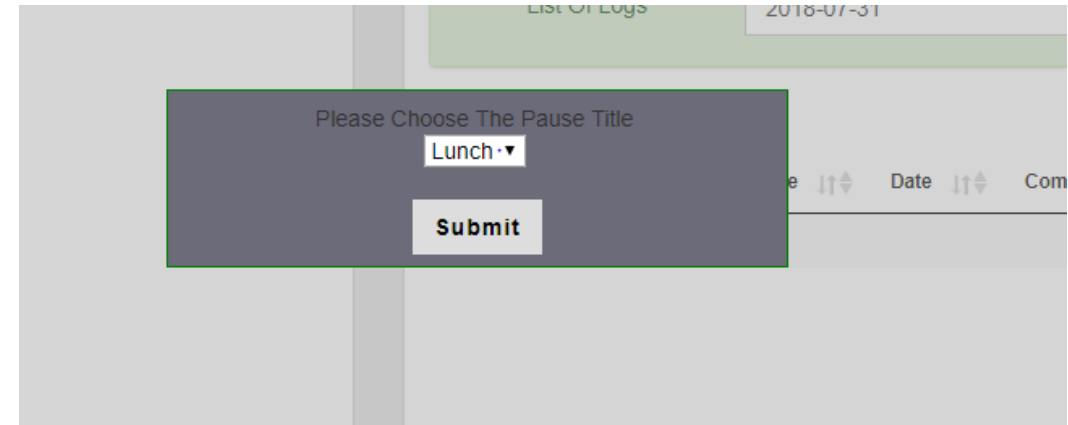
The agent should choose the reason why he is in a pause.









By clicking “submit” his paused time started and what you see is in pic 3

pic 1



pic 2



↑ User	User Name	Current Status	User Group	Campaigns	Monitor	Total Calls	Last Call Activity	#Sales	Pause Time	Talk Time
502	Moses	 PAUSED 00:33:35	AGENTS	09454	  	1	00:33:45	0	00:43:35	00:00:11
599	599	 PAUSED 00:04:39 Lunch	AGENTS	09454	  	0	01:55:09	0	01:54:52	00:00:00