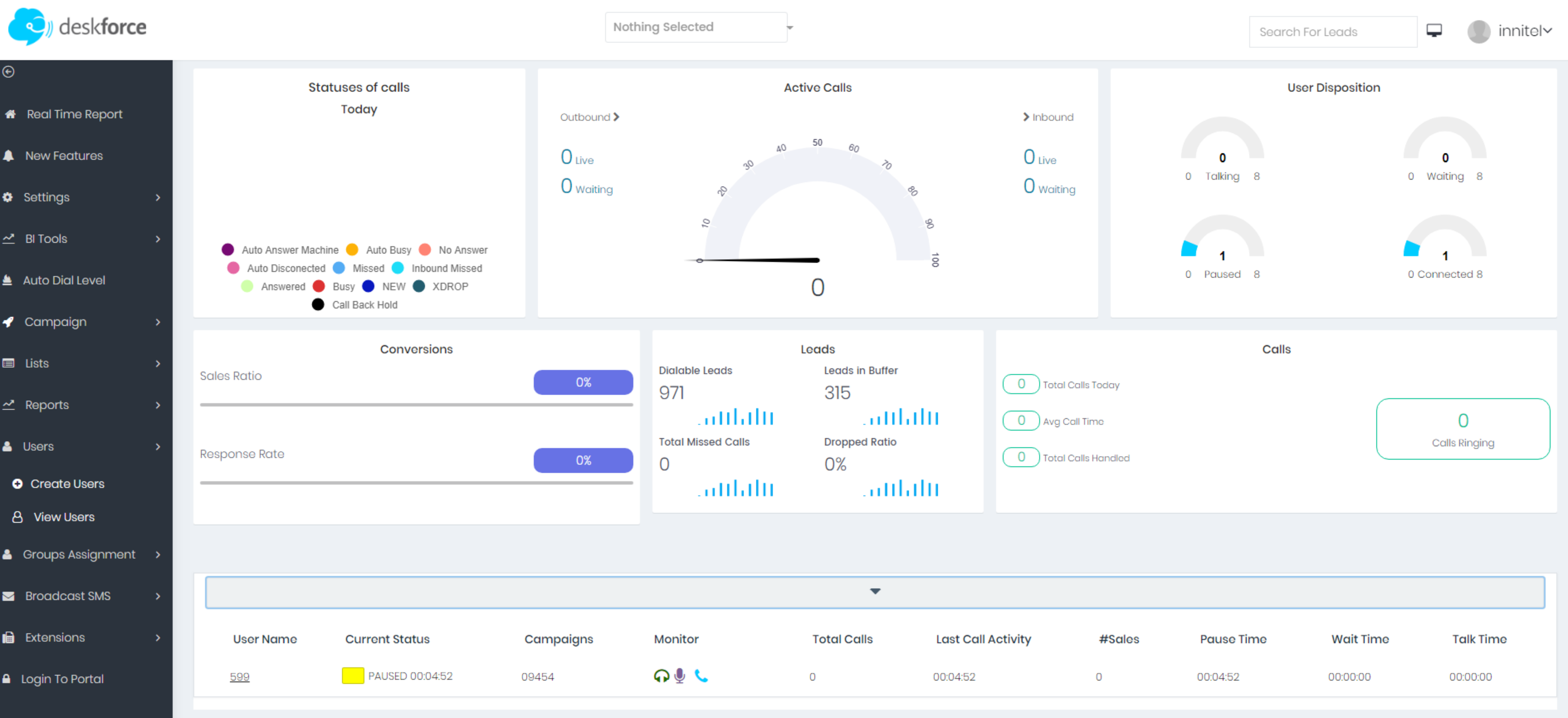
# Welcome to Deskforce Dialer

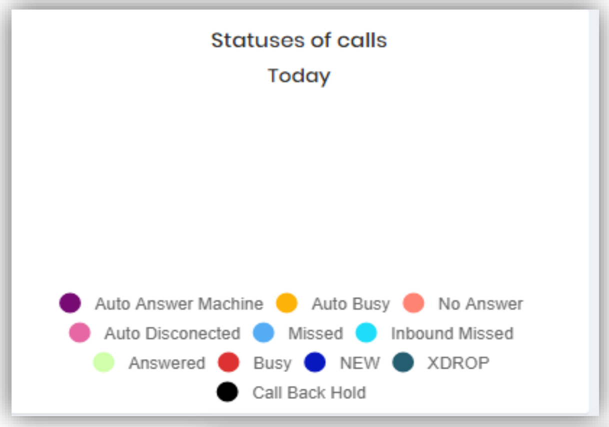
## Manager Dashboard

- Real Time Report
- Settings
- BI Tools
- Autodial level
- Campaign
- Users
- Groups Assignment
- Extensions
- Reports
- Lists

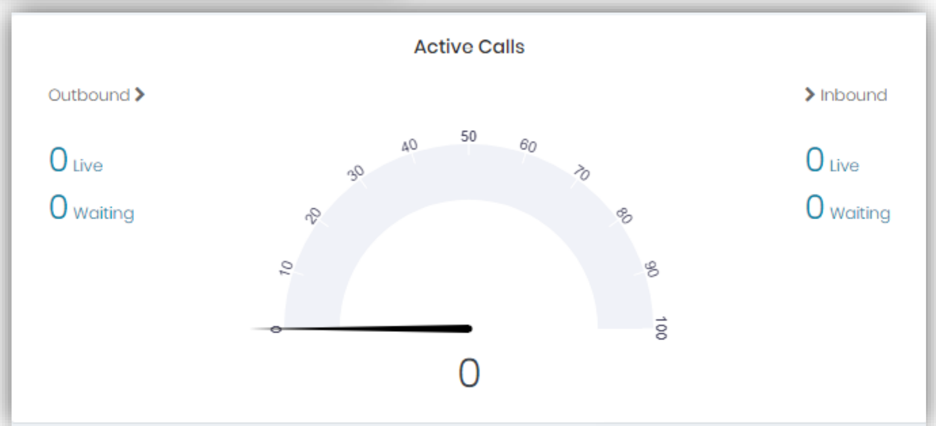
## Agent Dashboard

# Manager dashboard – Real Time Report

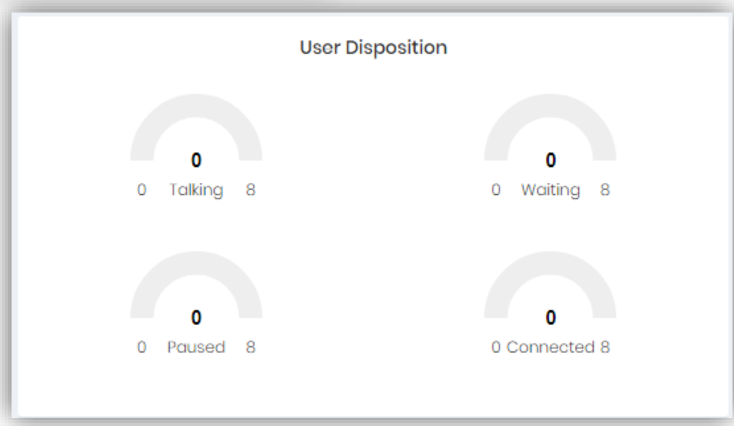





These are statuses that agents choose after finishing the call



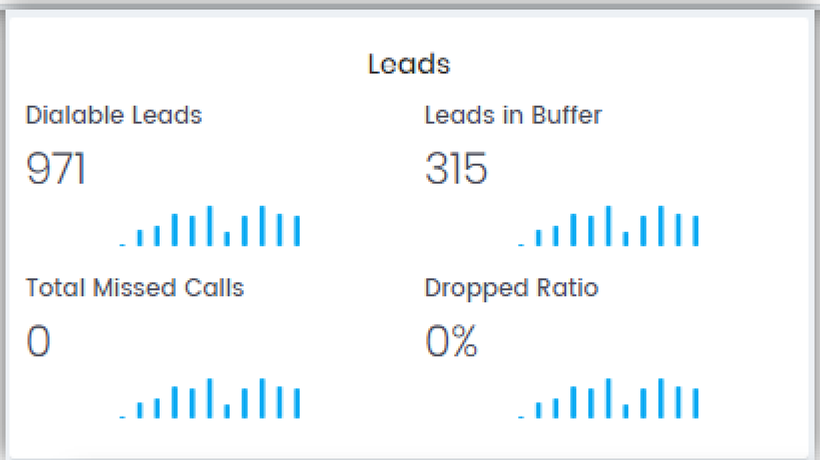

These are all active inbound and outbound calls. You see how many agents are in a call and waiting for a call



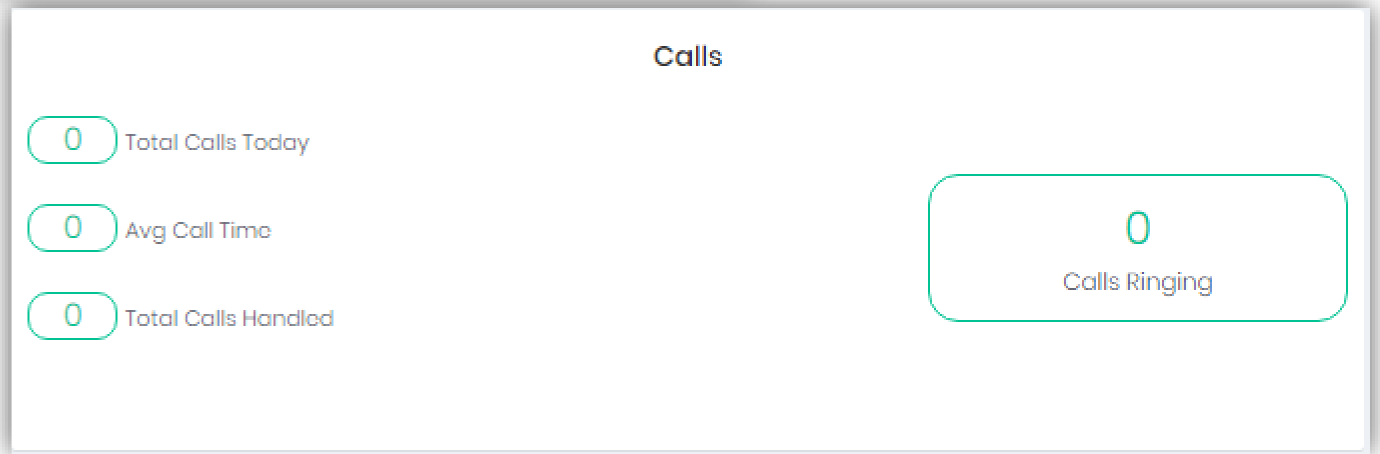

You are able to see how many agents are talking, waiting for a call, are in a pause and connected agents


**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

- [x] Users
- [ ] Extention
- [x] Current Status
- [x] Campaigns
- [ ] Lead Phone
- [x] Monitor
- [x] Total Calls
- [x] User Name
- [x] Last Call Activity
- [x] #Sales
- [x] User Group
- [x] Pause Time
- [x] Wait Time
- [x] Talk Time
- [ ] Dispo Time
- [ ] Dead Time
- [ ] Logged in Time

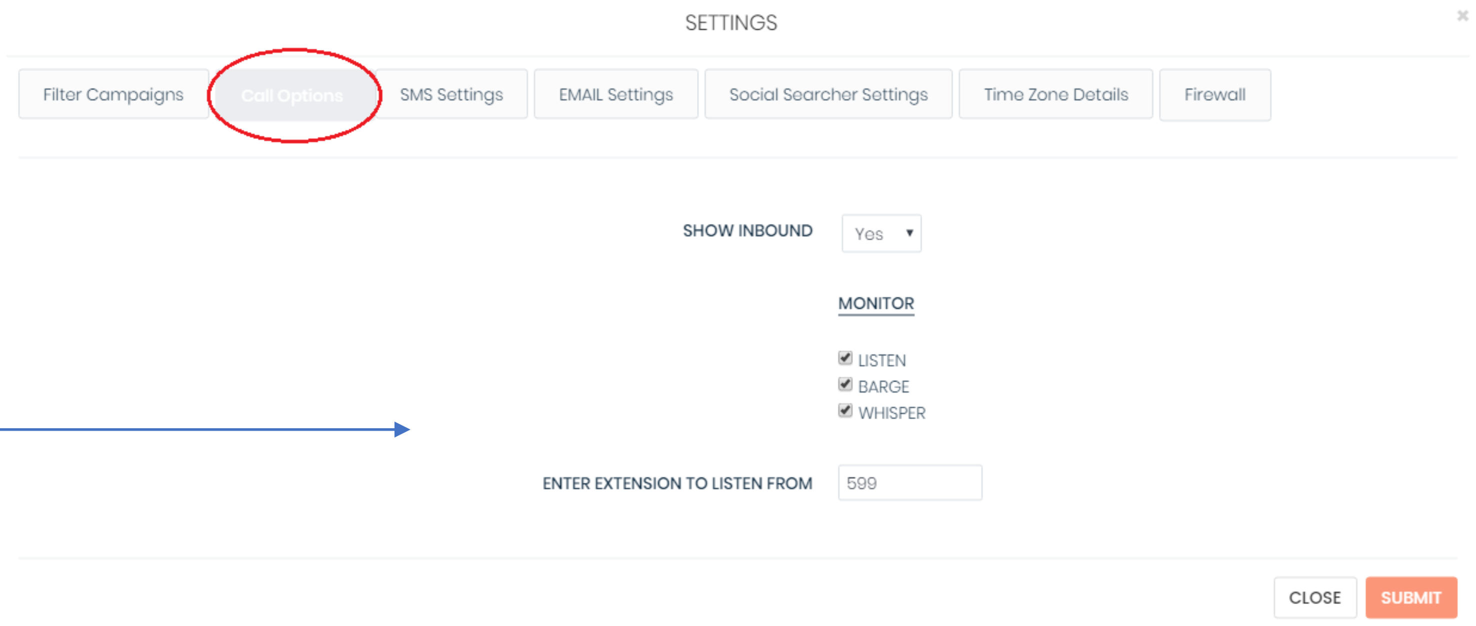
UNSELECT ALL SELECT ALL

Paused < 5 minutes
Paused > 5 minutes
Waiting for call < 5 minutes
Waiting for call > 5 minutes
Outbound Call < 5 minutes
Outbound Call > 5 minutes
Inbound Call < 5 minutes
Inbound Call > 5 minutes
Dispo < 5 minutes
Dispo > 5 minutes
Dead call < 5 minutes
Dead call > 5 minutes

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

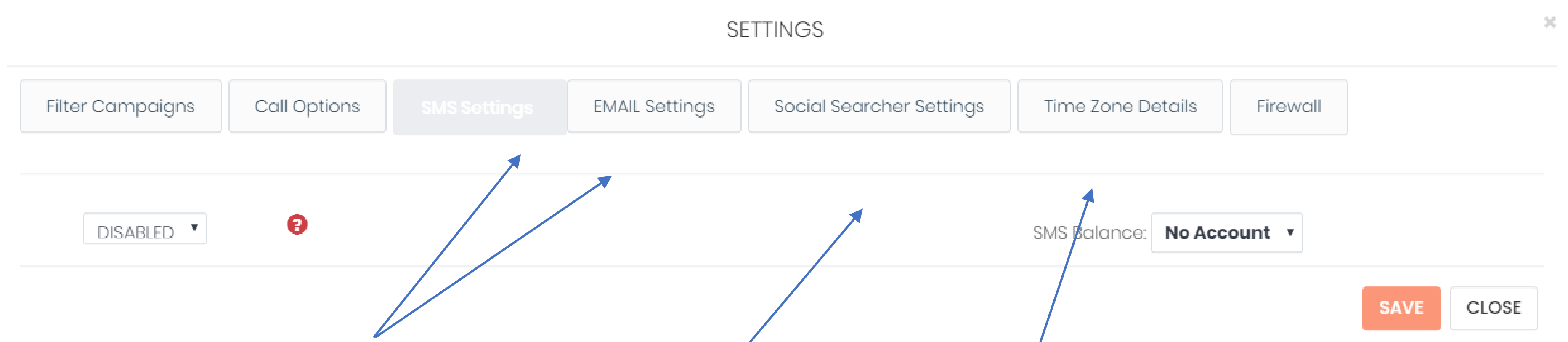
# Monitoring an agent

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




<u>You have three options:</u>

**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.



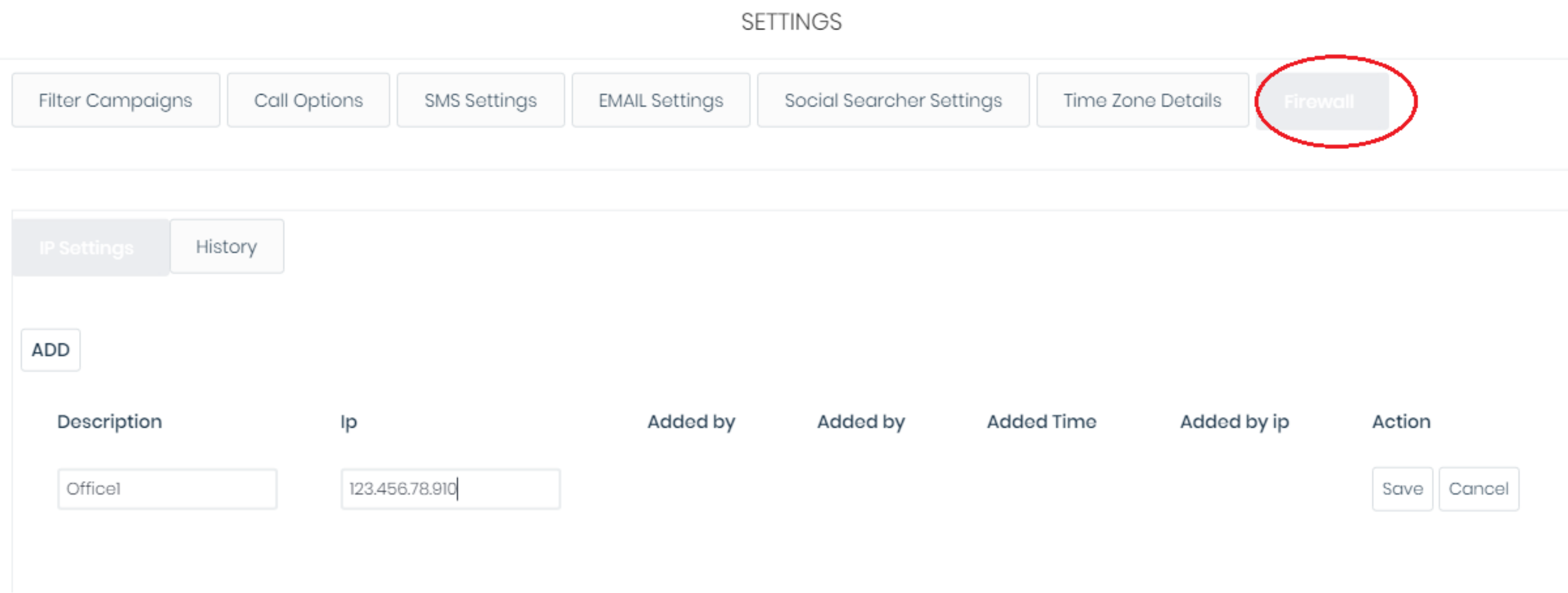

You have **SMS and Email settings**. Your agents can send SMS or email to the clients during or after finishing the conversation

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:

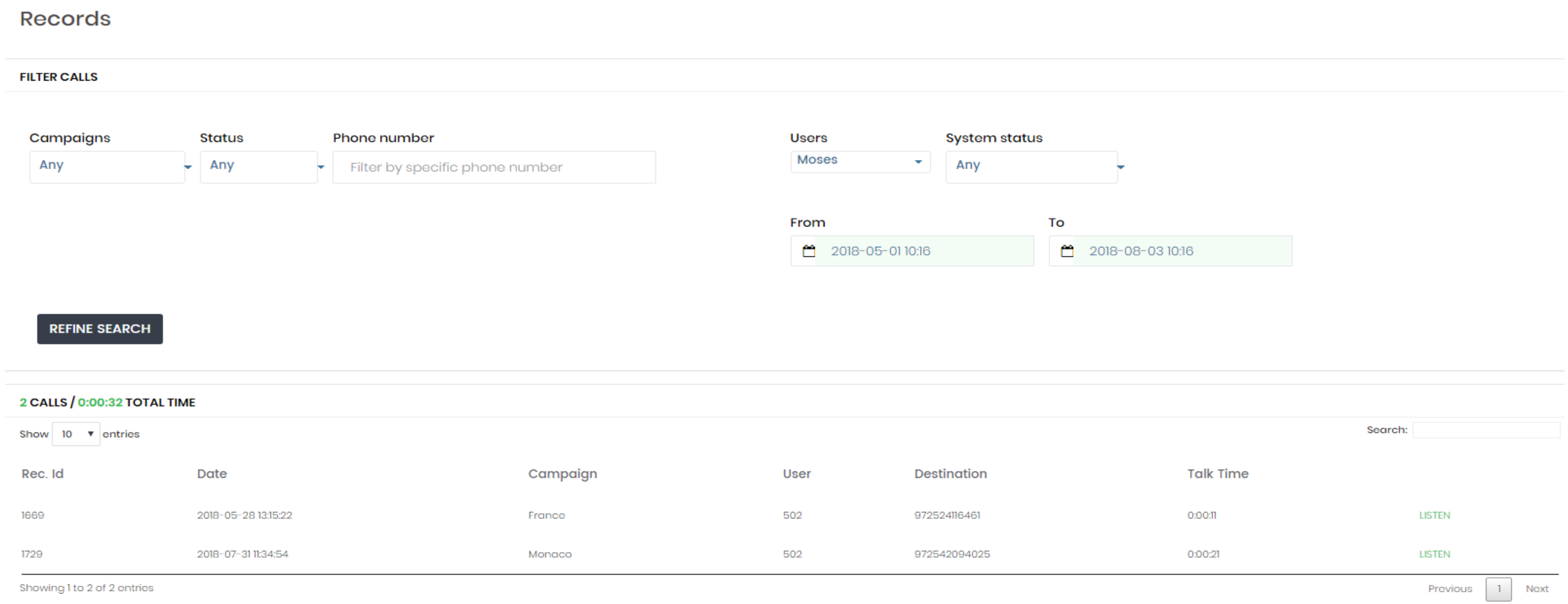
1. Go to “Settings”
2. Click on “Firewall”
3. Click on “Add”
4. Fill out the “Description“ and “IP”
5. Click “Save”

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:

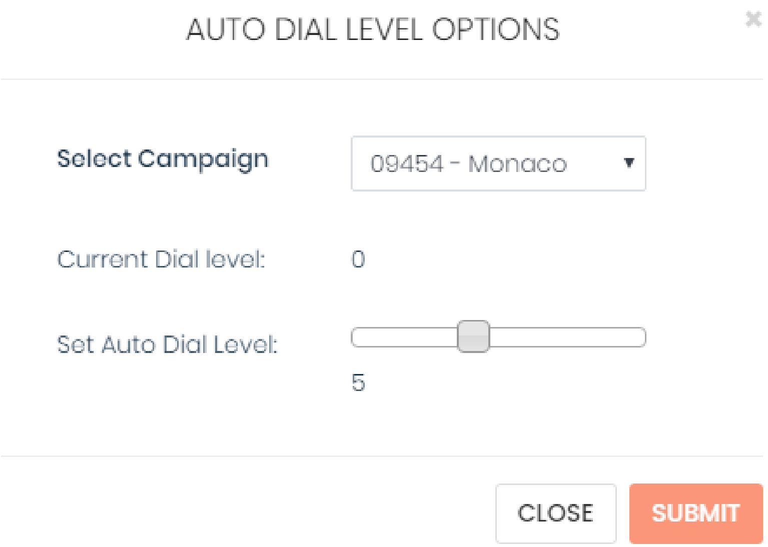
1. Go to “BI Tools”
2. The window below will appear and filter by your needed criteria
3. Select “Refine search”
4. Find the recording you want to listen and press “listen” button which is on the bottom on your right



**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

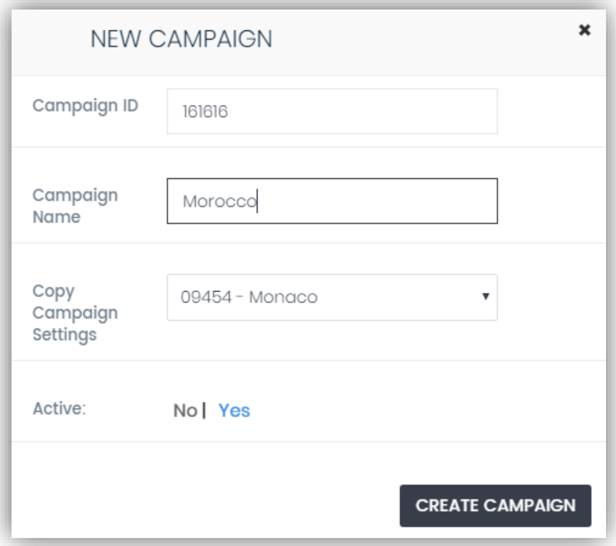
Follow the steps:

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”



# 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”




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

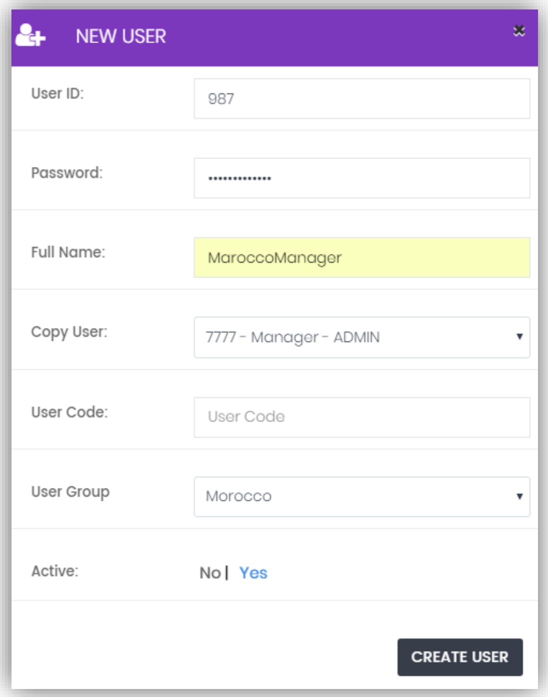

CAMPAIGNS LIST

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

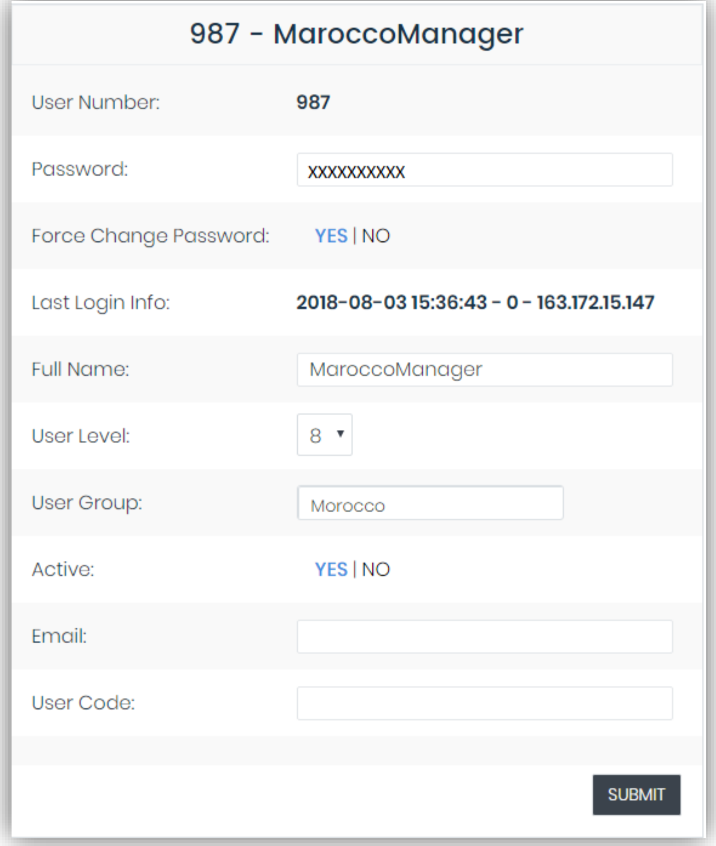
# Users

**Create users:**

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

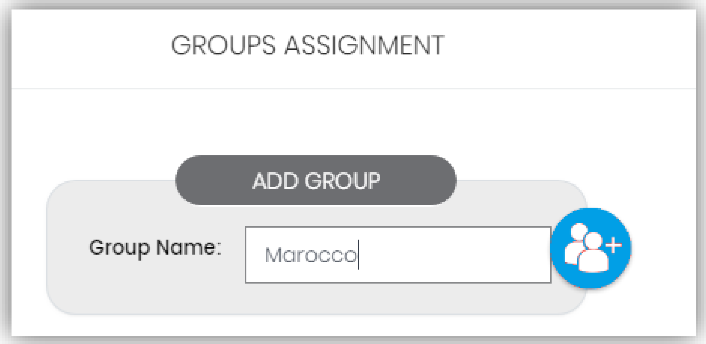


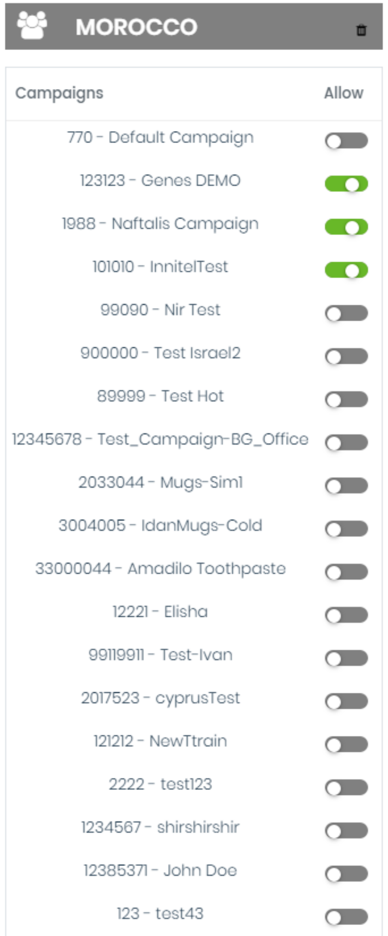

**View users –** you are able to see all existing users. You can click on the chosen user and edit the information for him



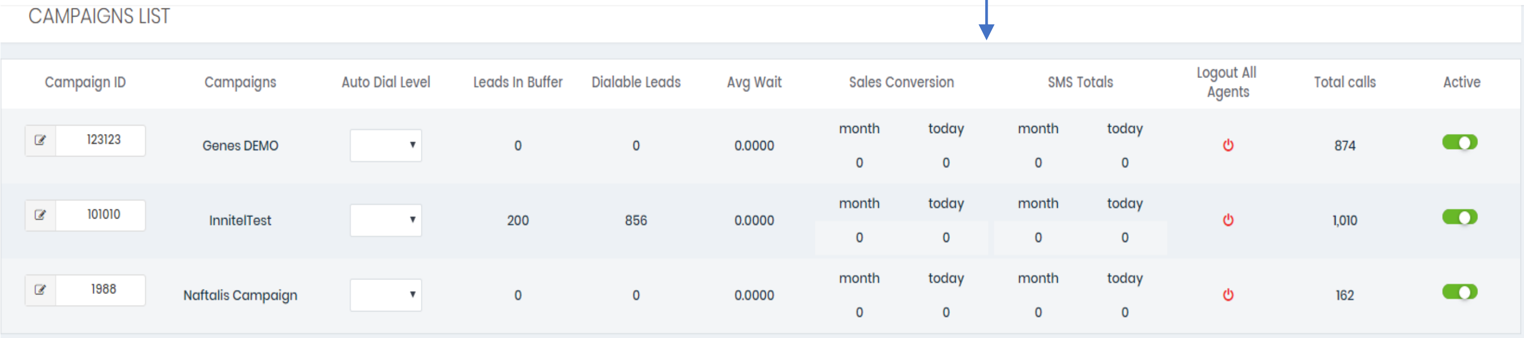
# Group Assignment –gives permission to a certain manager to see certain groups

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




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

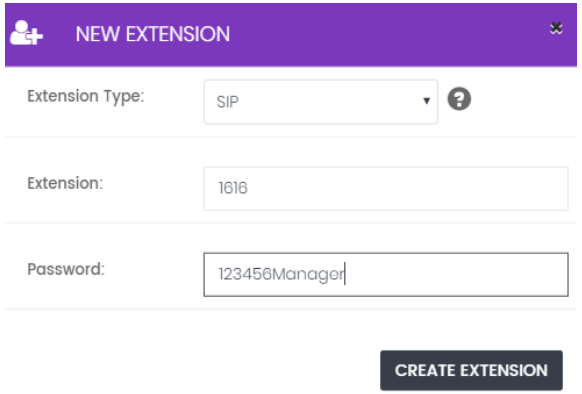

CAMPAIGNS LIST

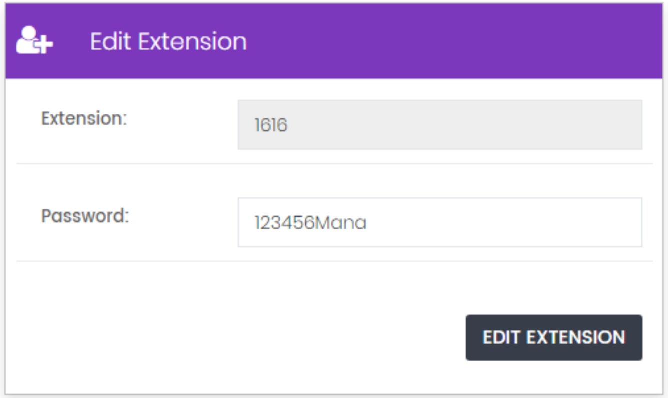
| Campaign ID | Campaigns | Auto Dial Level | Leads In Buffer | Dialable Leads | Avg Wait | Sales Conversion | | SMS Totals | | Logout All Agents | Total calls | Active |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | month | today | month | today | | | |
| 123123 | Genes DEMO |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

# Extensions

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


**Create extension:**
Click on "Create extension" and fill out the needed information

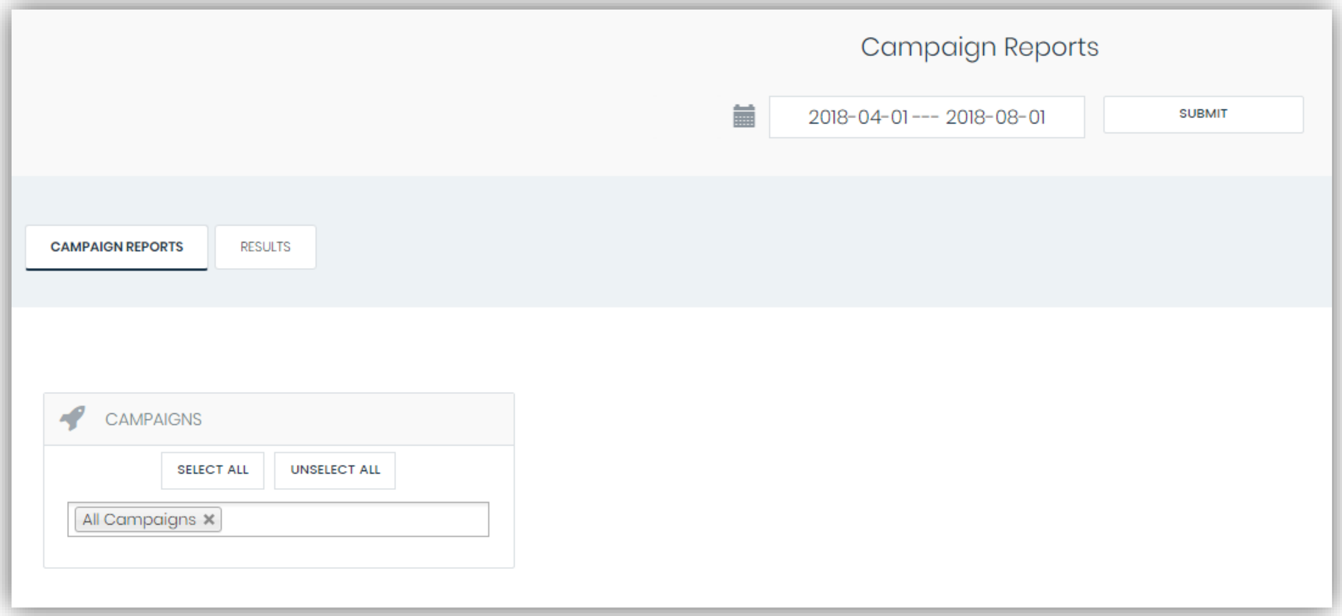


# Reports

**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




## 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

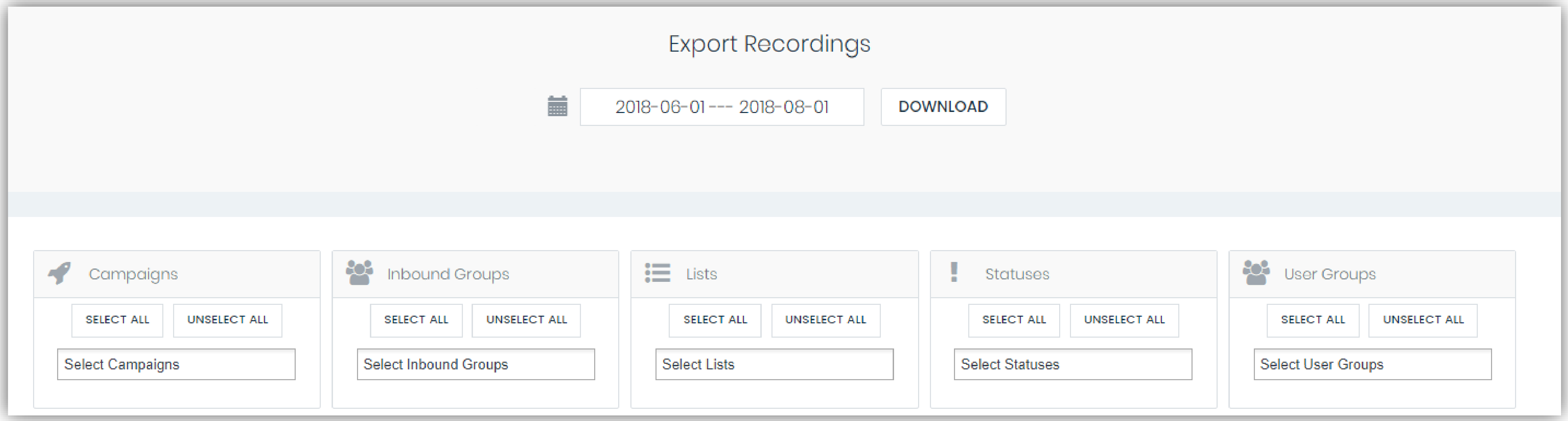
AGENTS SALES REPORTS

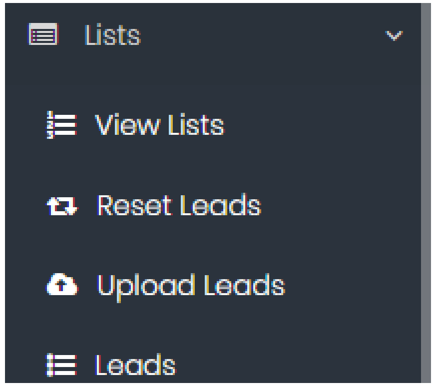
| Agent Name | Agent ID | Leads | Sales | Sales Per Hour | Sales per Working Hour | Incomplete Sales | Cancelled Sales | Average Sale Time |
|---|---|---|---|---|---|---|---|---|
| 599 | 599 | 2 | 0 | 0.00 | 0.00 | 0 | 0 | 00:00 |

AGENTS STATS

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

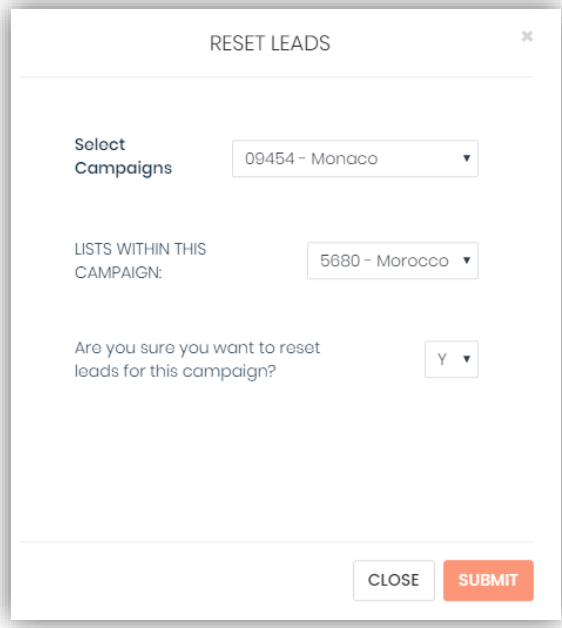
You can search for recordings by certain campaign, inbound group, list, status or user group for a certain period of time. By clicking on “Download” all the recordings will be downloaded in zip file



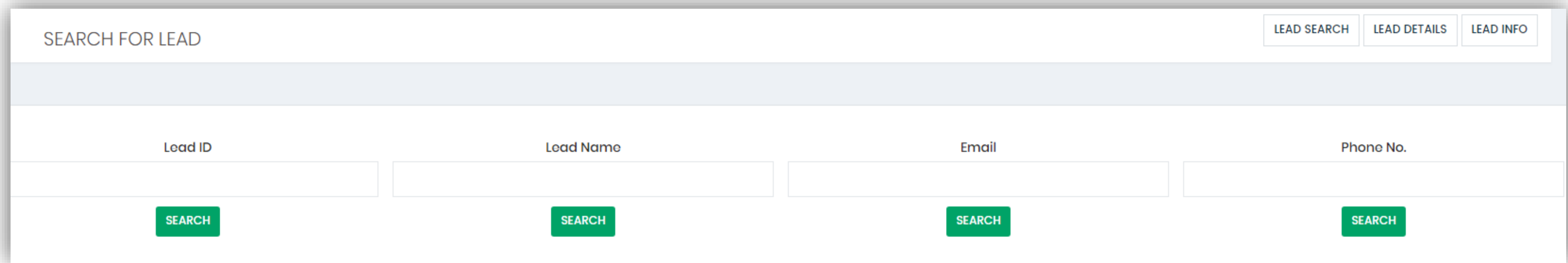



You can see all list with leads

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

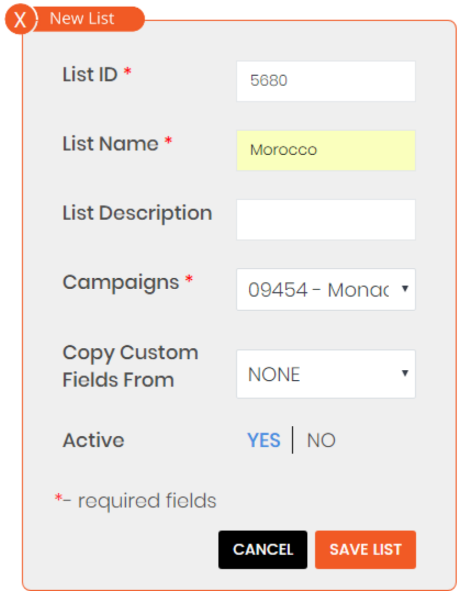


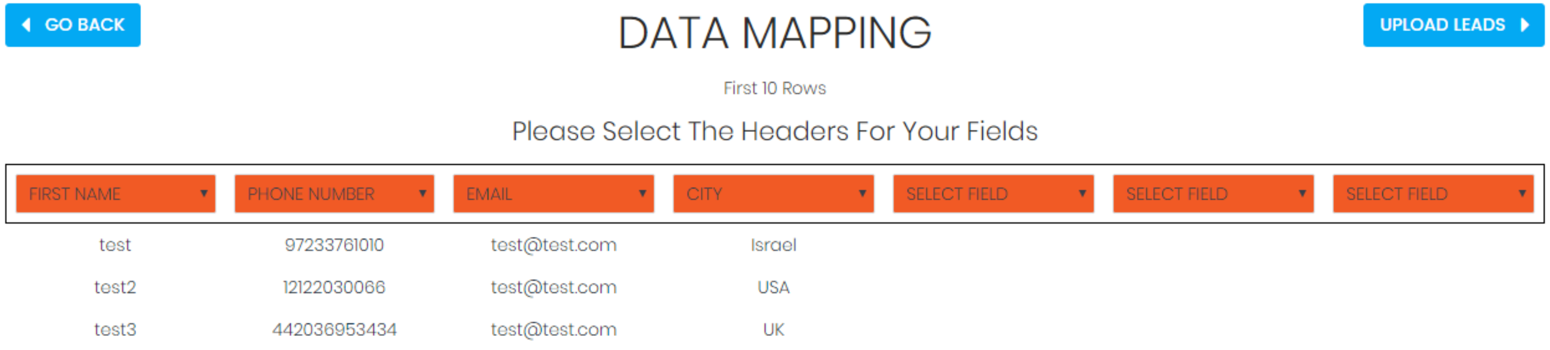
# Uploading list with leads

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”

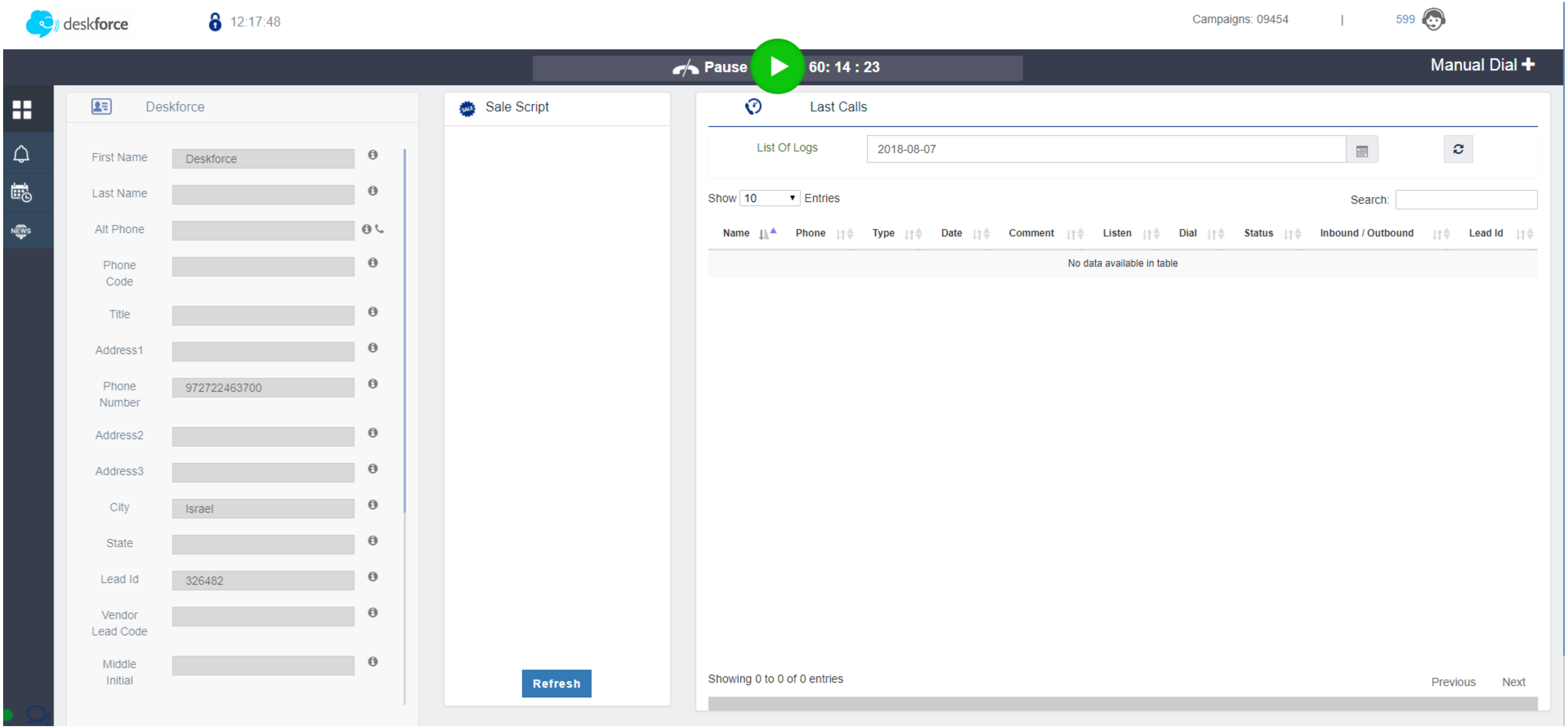
pic1




pic2

# Agent Dashboard



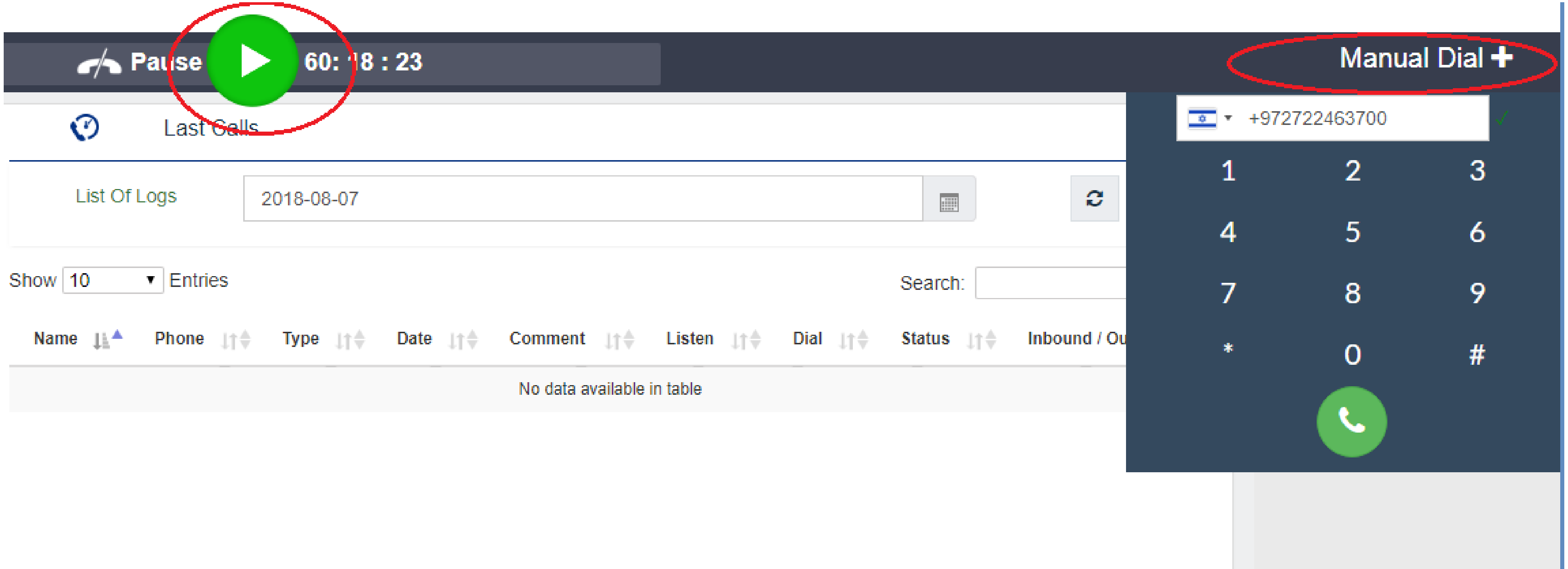
Two possible ways for your agents to make a call

**Automatic Dialing**

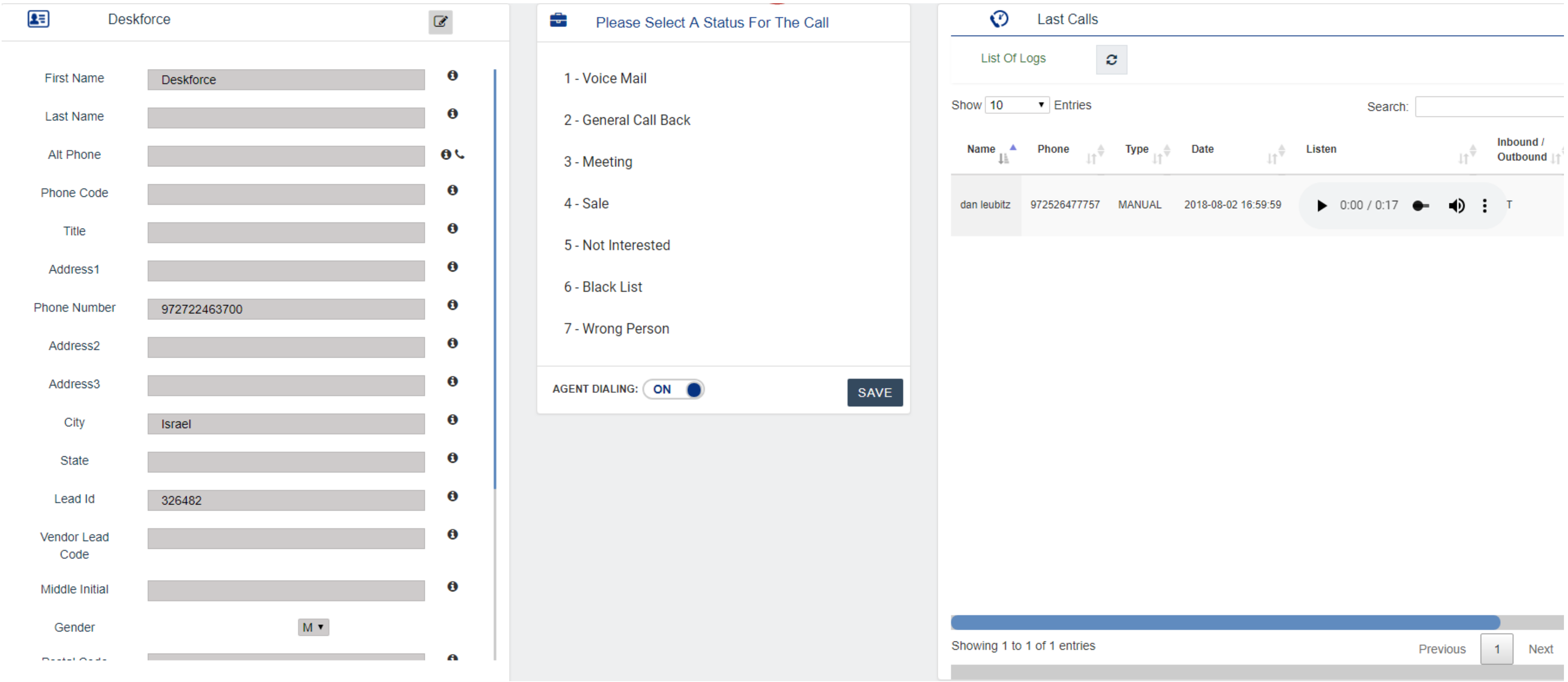
Just by clicking on the green button

**Manual Dialing**

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

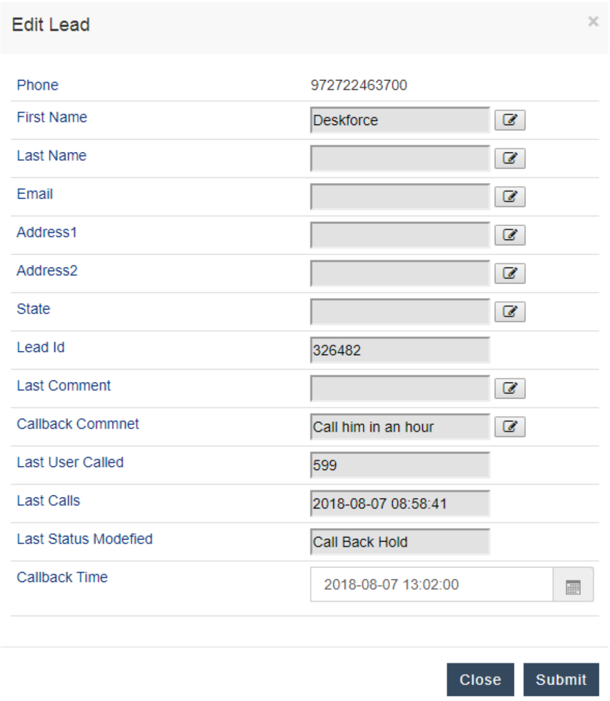


After finishing the call your agent can fill out the information for the lead, can choose the status of the call and on his right he will see the information for the call

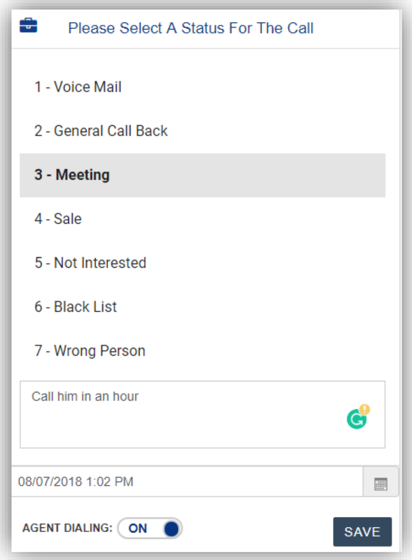


Let’s say that the agent put a status” Meeting”. He is able to put a comment and select a date and time for the meeting/pic1/. By clicking on “Submit” this will be saved. If the agent wants to see all appointments he can go in the small menu on his left and click on this icon.

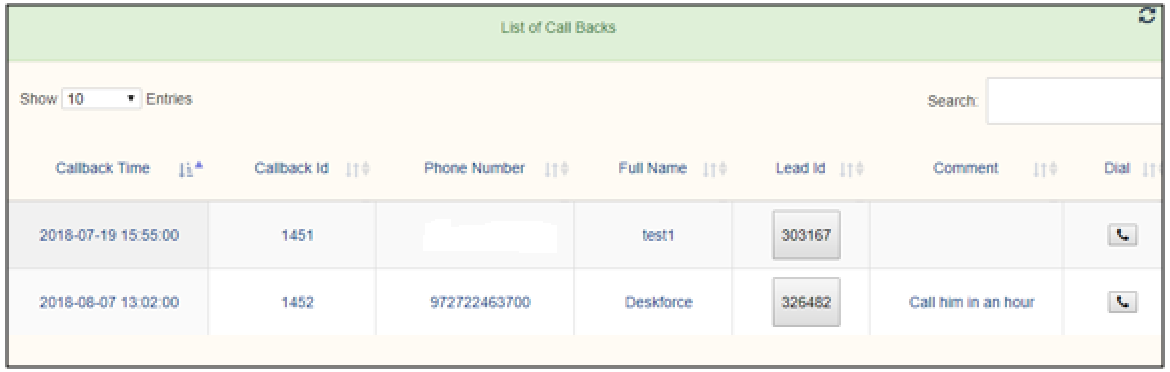
Then all appointments will appear/pic2/. You can choose the call you want to see more detailly/pic3/




**pic3**

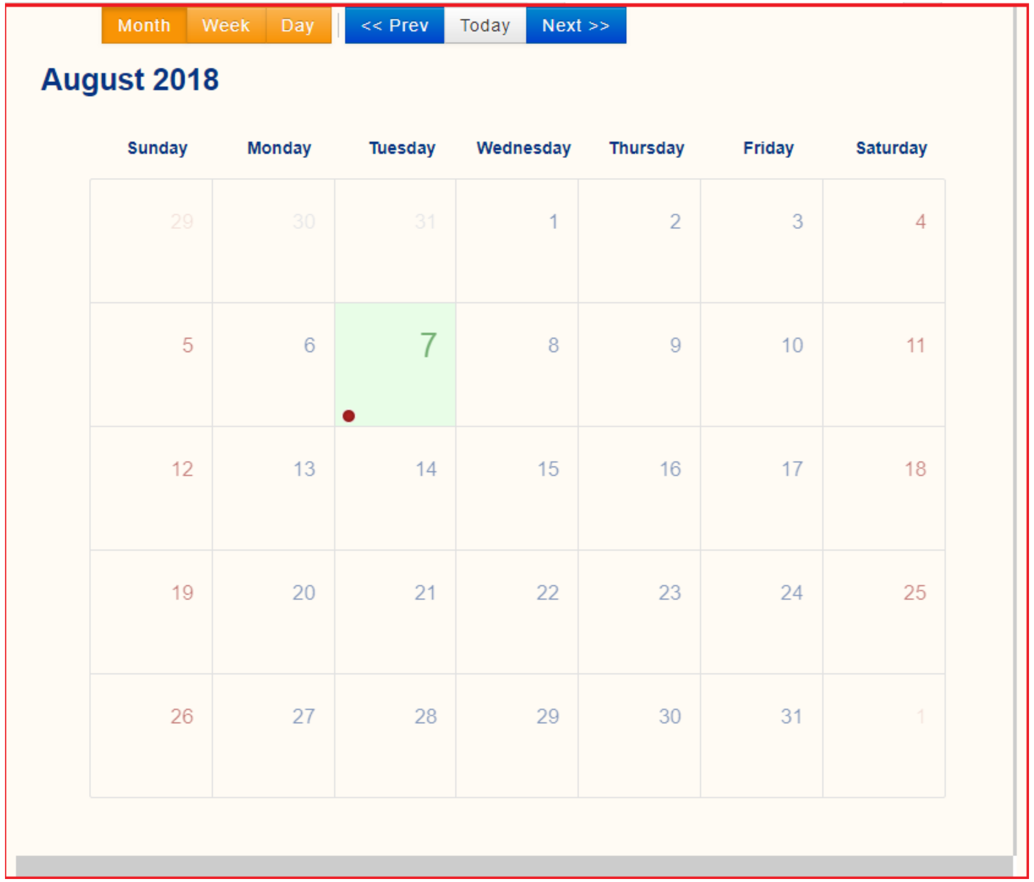



**pic1**



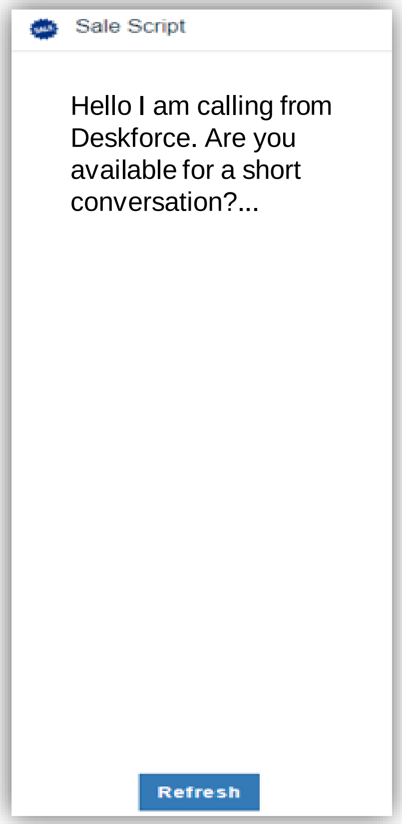

**pic2**

The agent has also a calendar with all appointments



# NEW FEATURE

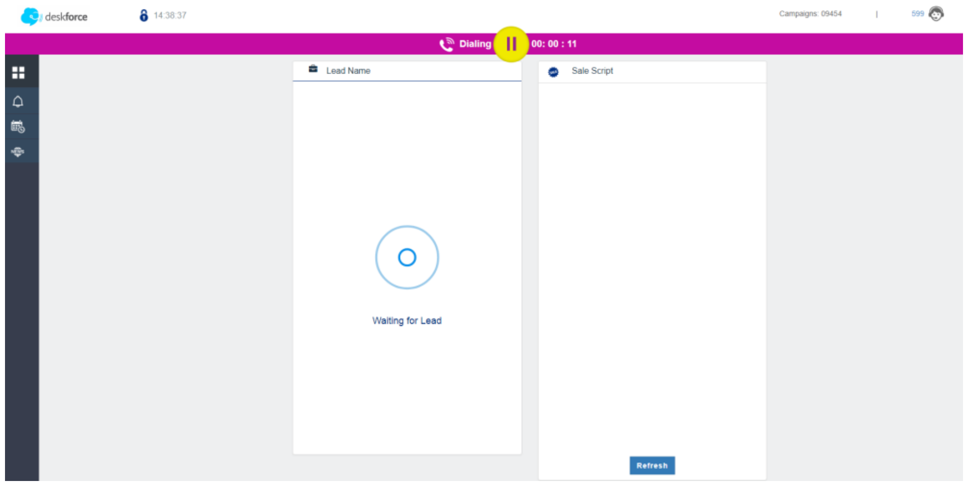
Sale script: Admin can now build his own sale script per campaign



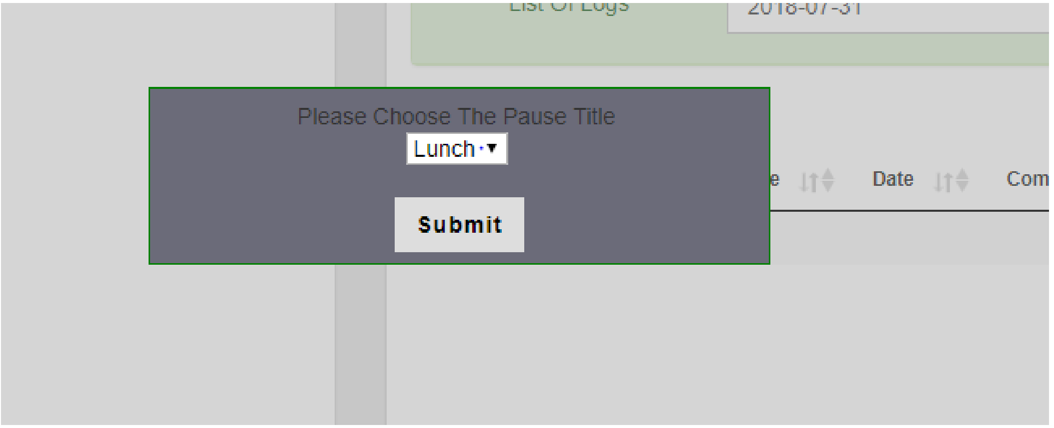
# How the agent choose the status when he wants to have a rest

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 |