



Neox Dial Center

User Guide

Software Version:	4.12.0.2
Document Version:	4.0
Document Release Date:	15 September 2022

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Revision History

Date	Version	Owner	Description
22 Apr 2021	1.0	Sterlite Technologies Ltd.	<ul style="list-style-type: none"> • Updated the “Creating CRM Notify Configuration” section to update new options for “Send Recording File” • Updtaed the “Updating Campaigns” section to add details about a newly added filed- “Call Recording File Name Tagging” • Updated “Server Management” section to show that the “Neox Recording Resource URL” field is no more mandatory • Updated “Creating Secret Key” section to change the “Create Secret Key” and “Secret Key Listing” screens • Updated “Updating Secret Key Configuration” section to change “Secret Key Configuration” screen • Added a new browser support - Microsoft Edge 88 and above in the following sections: <ul style="list-style-type: none"> ▪ Login to Neox DC ▪ Log in to Neox DC as Manager ▪ Log in to Neox DC as an Agent • Following modules are deperected, so added a note for same: <ul style="list-style-type: none"> ▪ Parking Slot ▪ Backup Management ▪ Call Park
30 Oct 2021	2.0	Sterlite Technologies Ltd.	<ul style="list-style-type: none"> • Updated notes section and screenshots in User Management and ACL Management modules to reflect Keycloak integration. • Added note in Logout module. • Updated note in various modules to reflect Google Chrome support. • Updated content to reflect Block/Unblock feature in Create Single User and Create ACL User sections.

Date	Version	Owner	Description
			<ul style="list-style-type: none"> • In Creating SMS Config section, replaced Extension with Phone Number and updated screenshot. • Updated screenshots in multiple modules to reflect Block/Unblock feature. • Removed 2.3.2.2.5 Realm-Admin Role Not Assigned to the User section.
22 March 2022	3.0	Sterlite Technologies Ltd.	<ul style="list-style-type: none"> • Updated screenshots in multiple modules to reflect the following features: <ul style="list-style-type: none"> ○ Configuring SMS API Gateway ○ Creating Call Times ○ Creating State Call Times
15 September 2022	4.0	Sterlite Technologies Ltd.	<ul style="list-style-type: none"> • Updated screenshots and content in multiple modules to reflect the following features: <ul style="list-style-type: none"> ○ Viewing Inbound CDR Report ○ Viewing Outbound CDR Reports ○ Viewing CDR Report ○ Viewing Voice Blaster CDR Report ○ Creating Single User ○ Creating ACL User ○ Loading New Leads ○ Viewing Agent Call Summary Report • Added block for View CDR and Statistics on Agent Screen

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1. Audience

This document is intended for System Administrators, Managers, and Agents, and anyone requiring a technical understanding of the Neox Dial Center (DC) operation.

Using Neox Dial Center (DC) requires a general knowledge of UNIX, networking, contact center and the telephone interface.

1.1 Document Organization

This document is divided into the following chapters:

- Chapter 1 - *Introduction to Neox Dial Center* provides information about Neox DC, its Components and Neox DC Log in.
- Chapter 2 - Using *User Management* module, administrator can manage User, User Groups, and Parking Slots.
- Chapter 3 - Using *Campaign Management*, administrator can create and manage different types of Campaigns, Pause Codes, List Mix, Dynamic Prompt, Conference, and SMS API Gateway.
- Chapter 4 - Using *List Management*, administrator can manage leads throughout the system.
- Chapter 5 - Using *Inbound Management*, administrator can create In-groups, DID, and Call Menu.
- Chapter 6 - Using *Service & Feature*, administrator can create Scripts for agents, DNC list, Number Profiles, and Disposition Status.
- Chapter 7 - Using *Call Time Management*, administrator can define call time globally and state wise and shifts for agents.
- Chapter 8 - Using *ACL Management*, administrator can create and manage different profiles to log in and access system through ACL User, ACL Profile, and ACL Profile Binding.
- Chapter 9 - Using *Reports Management*, administrator can create various reports, such as Agent, Inbound and Outbound, Call CDR, Voice Blaster, Advance and Audit Report.
- Chapter 10 - Using *Bulk Operations*, administrator can perform bulk operations, such as creating Bulk Usergroup and Ingroup, Bulk Phone, and Bulk User.
- Chapter 11 - Using *Phones*, administrator can configure Phones used by the Agents to handle calls.
- Chapter 12 - Using *System Management*, administrator can perform various configurations, such as Server, Third-Party, Backup Management, GUI Customization, and Change Password.
- Chapter 13 - Using *Dashboard*, administrator can monitor Live Calls, Live Agents, Campaign, Ingroup, KPI and Change Skin.
- Chapter 14 - Using *Logout*, administrator can log out from the system.
- Chapter 15 - Using *Neox DC Login as a Manager*, manager can login to DC and access the delegated modules.
- Chapter 16 - Using *Neox DC Login as an Agent*, agent can login to DC and manage calls.
- Chapter 17 - *Acronyms* provides information about used in the user guide.

1.2 Technical Support

Neox Technical Support for Neox Products is designed to meet your full range of support needs. From basic service to mission-critical support, we are committed to ensuring your success with Neox products. We tailor different support plans to meet your evolving business requirements.

Our entire support organization is focused on complete customer satisfaction and providing immediate solutions to your business needs.

You can contact Neox technical support for Neox Products by calling or sending an email to our help desk facility

- Landline: +91-79-49135778 | Toll Free: 1-800-102-4750
- Email: neox.support@sterlite.com
- You can also visit us on the Web at: www.neoxsolution.com/neox-support.htm

2. Introduction to Neox Dial Center

Neox Dial Center (DC) is a web-based interface to configure and monitor Neox DC components, modules, and reports. Neox DC enabled the Agents to handle the calls and perform Neox DC configuration for Campaign, User, Inbound group, Call Time and ACL management, Service and Features to automate Call Center processes and so on. In Neox DC, three users' login are available by default, namely Administrator – Access rights to all modules, Manager – Access rights to limited modules, and Agent – Access rights to selective Campaign.

Contents:

- *Neox Dial Center*
- *Neox DC Components*
- *Neox DC Login*

2.1 Neox Dial Center

Neox Dial Center Solution is a part of Contact Center solution that unites Outbound, Inbound, and Blended voice processes. It also delivers Interactive Voice Response (IVR), Recording, Quality Management, Comprehensive Reporting, and Administrative Capabilities. Neox Dial Center Solution helps customer service and support operators, inside sales people, telemarketers, collections agents, and other phone based teams to increase sales, save money, and improve customer satisfaction.

The solution automates the call center processes, enabling users to focus more on running the business and keeping the customers completely satisfied. This powerful system includes a complete suite of business communication applications in one appliance.

Inbound Process - Automatic Call Distribution (ACD)

ACD allows Contact Centers to answer calls as they enter the contact center, play Welcome Message, and intelligently route them to available agents based on the Dialed Number (DNIS), Calling Party Identification (ANI), available Agents, and Agent Selection Algorithm or customized Business Rules. Inbound Agents can participate simultaneously in Outbound Dialing to provide blended support.

Outbound Service – Manual/Auto/Preview/Predictive Dialer

Neox Dial Center Outbound Service utilizes multiple Predictive, Preview, Progressive, and Manual dialing options to manage pacing and compliance with regulations. Outbound Service operates a variety of campaign and list management strategies, and ensures accurate voice, fax, and answering machine detection. In addition, Outbound Service also provides Do Not Call List Management, Time Zone Management, and Scheduled Call-back.

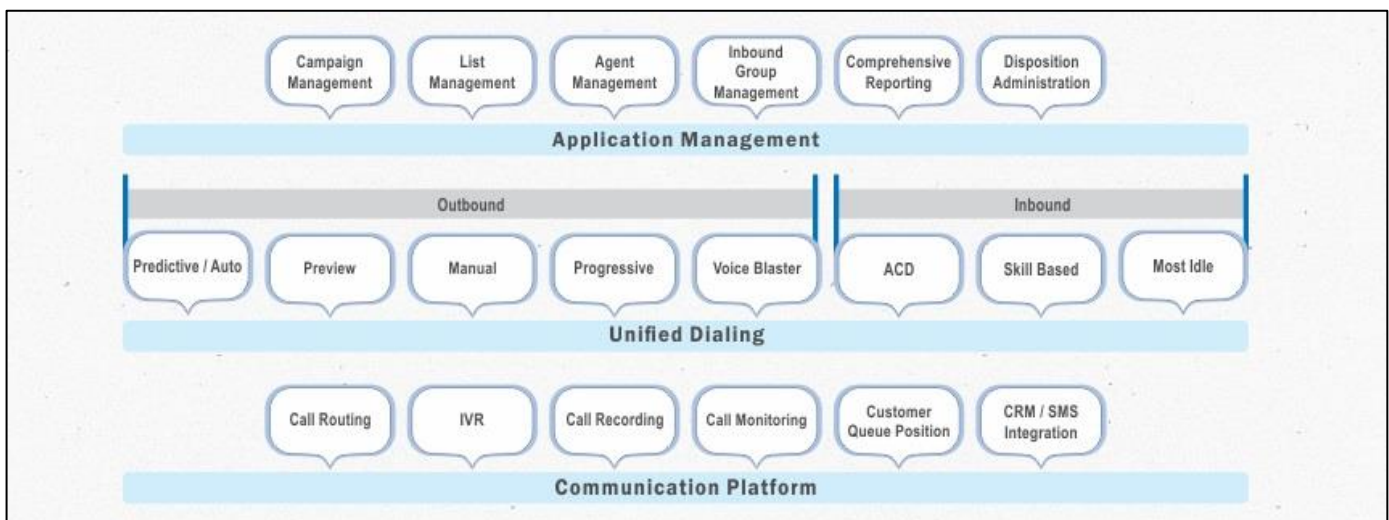


Figure 1 Neox Dial Center Solution

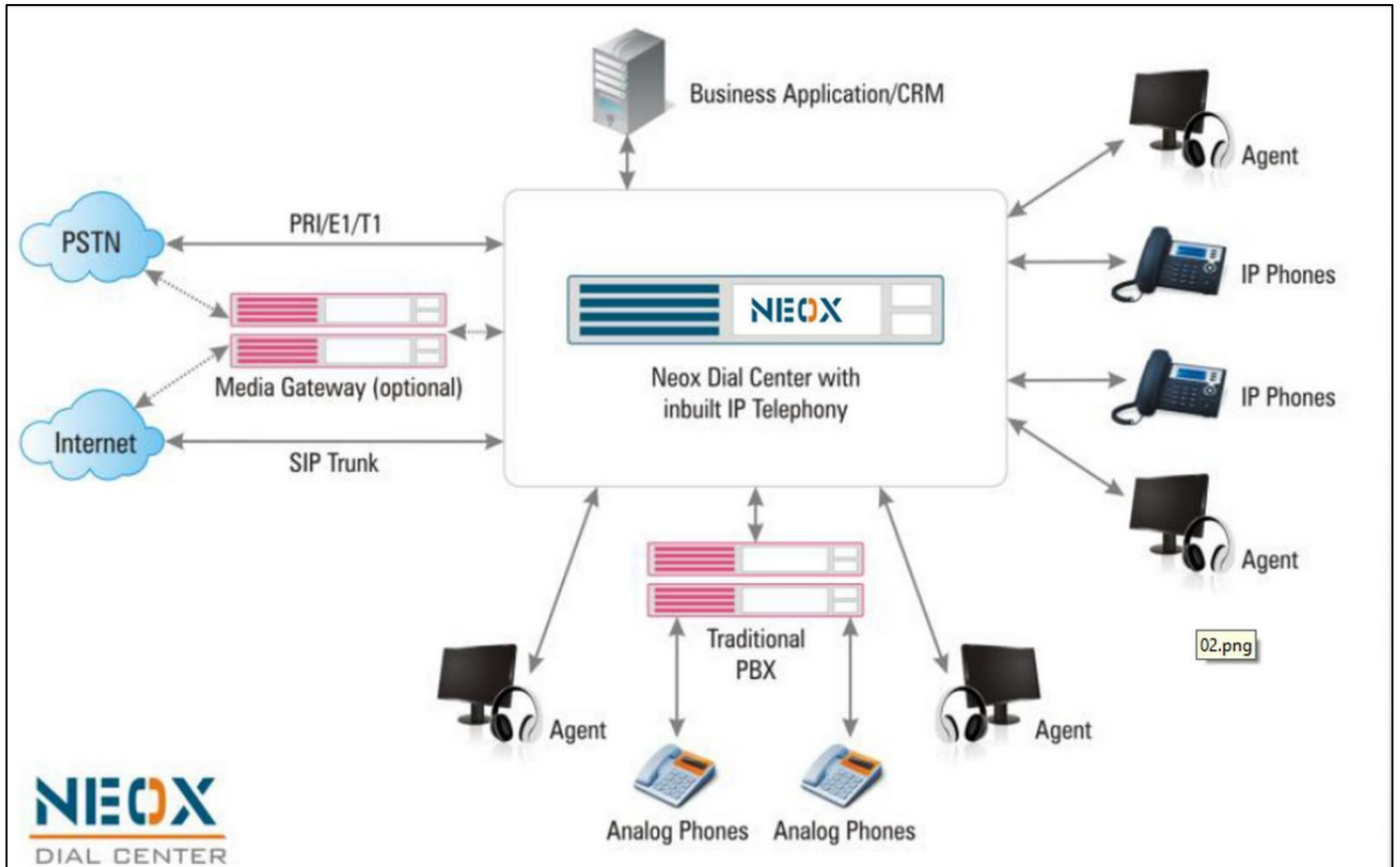


Figure 2 Neox Dial Center Deployment

2.2 Neox DC Components

Neox DC has four major components as below:

- Server Configuration
 - Interface to configure Neox Dial Center.
 - Allows Reporting and Analysis.
- Agent
 - Manages Agent GUI lifecycle - Login, Calling, Disposition, Call Features, and Logout.
 - Provides interface to Perl engine.
 - Provides interface with MySQL DB.
- DC Engine
 - Interacts with IP Telephony Engine and MySQL DB.
 - Instructs IP Telephony Engine to carry out actions as requested by agents.
 - Processes responses received from IP Telephony Engine and manipulates agent and call accordingly.
- Dashboard
 - Provides live monitoring of resources, such as agents and calls.
 - Provision to logout an agent or disconnect a call.

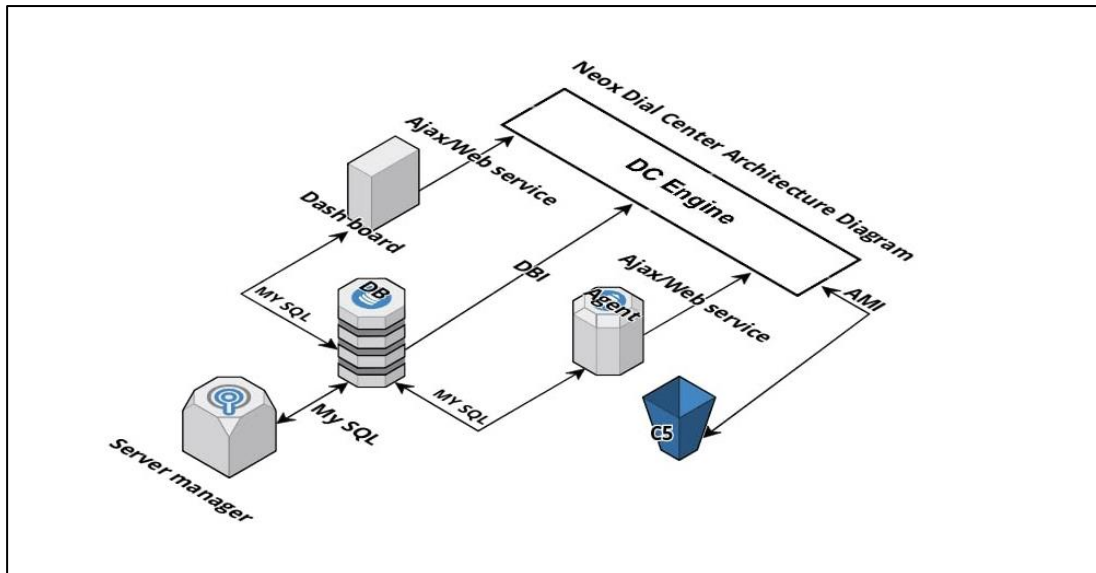


Figure 3 Neox DC Architecture Diagram

2.3 Neox DC Login as Administrator

After the successful installation of the Neox Dial Center, the Login screen appears. By default, log in screen allows login of all three types of users, such as Administrator, Manager, and Agent. The user has to click on their respective profile to log in and access Neox DC. For example, if you are an administrator, click **Admin Login**, for Manager, click **Manager Login**, and for Agent, click **Agent Login**.

Based on the status of **SSO (Single_Sign_On)** via *Keycloak* – enabled or disabled, login steps differ.

This section is divided into the following actions:

- *Login to Neox DC*
- *Navigating through Neox DC*

2.3.1 SSO is Disabled

Users will be created and authenticated in Neox applications.

2.3.1.1 Log in to Neox DC

Note

Recommended Browsers – Google Chrome 94, Mozilla Firefox 60 and above, and Microsoft Edge 88 and above.

To login to Neox DC, follow these steps:

1. Open the browser, type Neox DC URL in the address bar and press **Enter**.

For example,

`https://<IP address>:9090` (where IP address is the address of Neox DC).

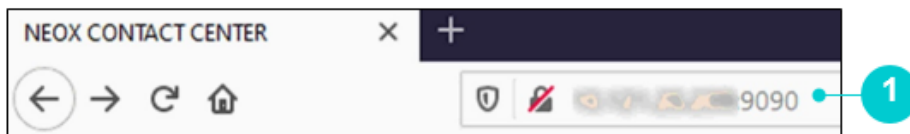


Figure 4 Neox login through browser

2. Neox DC Log in screen appears.
3. Click **Admin Login** to login as admin.

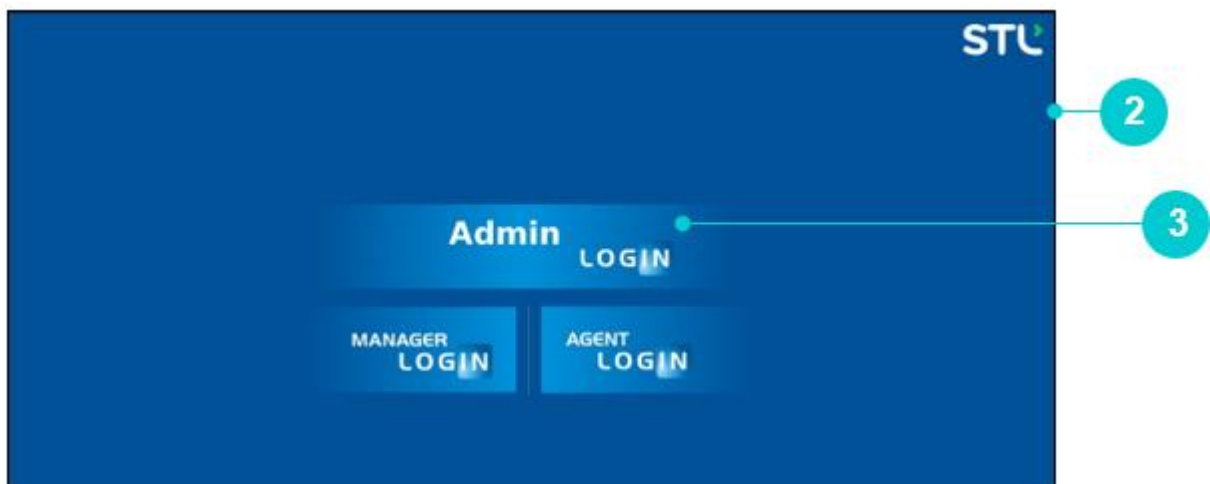


Figure 5 Neox Admin Login

4. Neox Contact Center login screen appears.
5. Enter a valid username and password.

6. Click **Go** to login to the Neox Contact Center.



Figure 6 Neox Contact Center

7. Once credentials are validated, then the Neox DC Home screen appears.

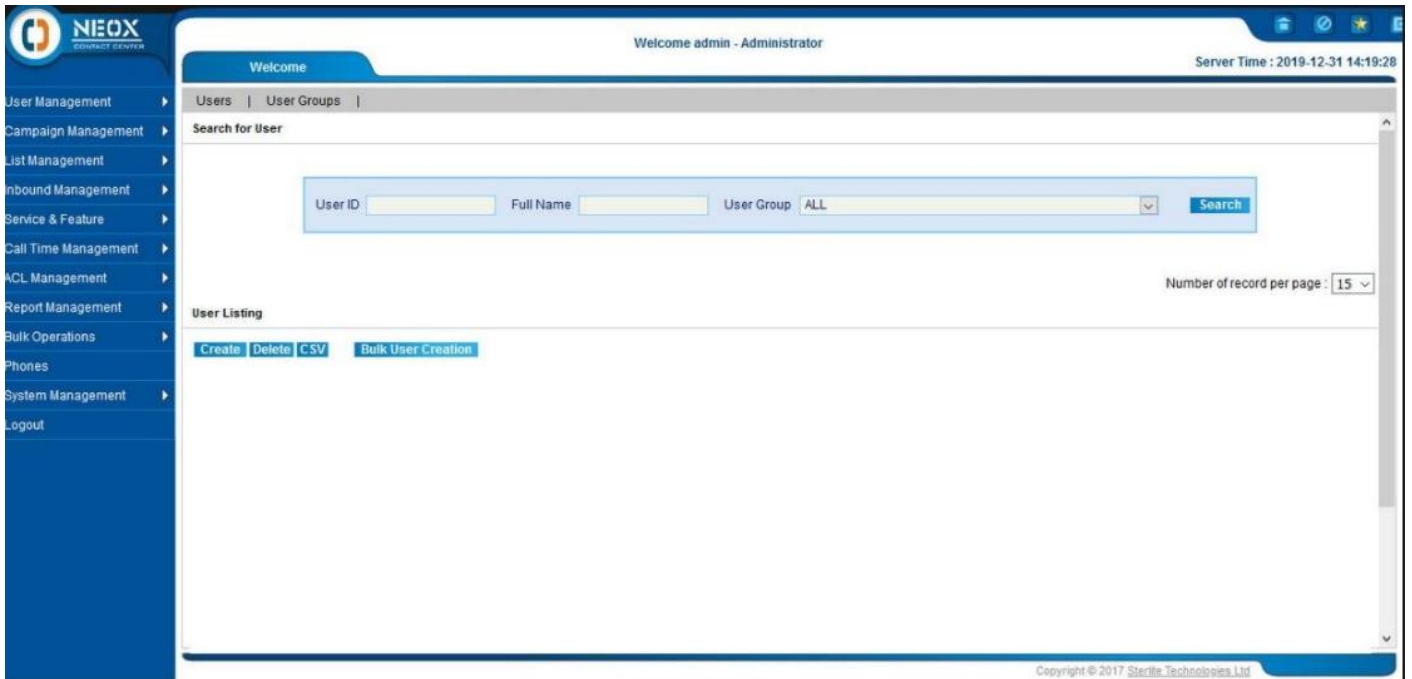


Figure 7 Neox DC Home

2.3.2 SSO is Enabled

Staff/Users will be created and authenticated on the SSO server.

2.3.2.1 Login Flow

With SSO enabled following is the Login/Session Flow:

1. User attempting the logging into the Client Application is redirected to Keycloak's login page (If not already logged in).
2. After logging in to the Keycloak, it redirects to the Client Application with details of client and realm profiles.
3. Client Application checks the following:
 - a. Whether the profile as received from Keycloak for the user matches as configured in the client application or not. If not, disallow login.
 - b. If the user is not available in the database, create one.
 - c. If the user is already existing, check the associated profile, first name, and last name. If the user information has changed, update the profile.
4. Provide the Client application's access to the user as per the associated profile.
5. With the Keycloak configuration enabled i.e., *Single-Sign-On => 1*, try to login by clicking on **Admin** or **Manager**. Alternatively, following the URL `http://<<ipaddress/hostname>>:<<port>>/<<application-name>>`

For example, type `http://XX.XX.XX.XXX:9090/admin/admin.php` in the address bar and press the Enter key. The system will redirect to the Keycloak login page.

Note

For https URL use the following link: <https://<<ipaddress/hostname>>:<<port>>/<<application-name>>>

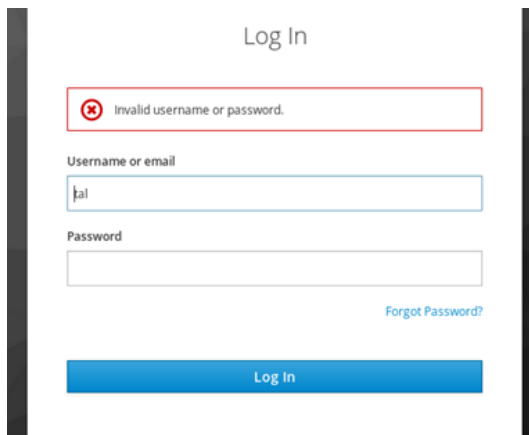
2.3.2.2 Login Failure

Login fails in the following scenarios:

- Invalid Username or Password
- No Profile/Role Assign
- Invalid Profile/Role
- Multiple Profile/Role Assign

2.3.2.2.1 Invalid Username or Password

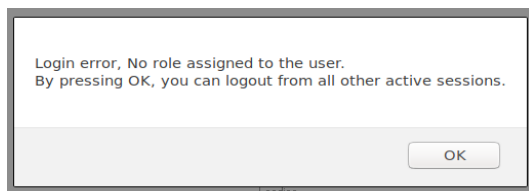
If the user enters an invalid username or password which is not already created in the Keycloak, the following message is displayed.



The screenshot shows a login form titled "Log In". At the top, there is a red-bordered error message box containing a red "x" icon and the text "Invalid username or password.". Below this, there are two input fields: "Username or email" with the text "jal" and "Password" which is empty. To the right of the password field is a blue link that says "Forgot Password?". At the bottom of the form is a blue button labeled "Log In".

2.3.2.2.2 No Role/Profile is assigned in the Keycloak

In a scenario where the user is created but the role is not assigned in the Keycloak, the login attempt fails and the following message is displayed.

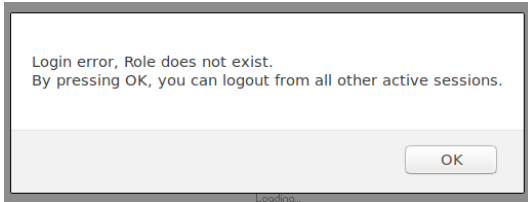


The screenshot shows a modal dialog box with a white background and a grey border. The text inside reads: "Login error, No role assigned to the user. By pressing OK, you can logout from all other active sessions." At the bottom right of the dialog is a button labeled "OK".

Click **OK**. The system redirects to the Keycloak login page.

2.3.2.2.3 Invalid Profile/Role

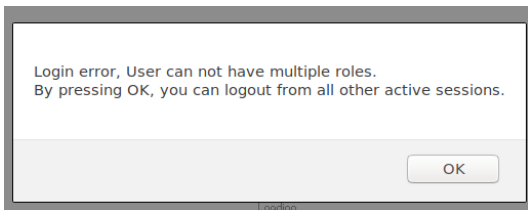
In a scenario where the role is assigned to the user in the Keycloak, but the role does not exist in the application, the login attempt fails and the following message is displayed.



Click **OK**. The system redirects to Keycloak login page.

2.3.2.2.4 Multiple Profile/Role Assign

In a scenario where multiple roles are assigned to the user, the login attempt fails and the following message is displayed.



Click **OK**. The system redirects to Keycloak login page.

2.3.3 Navigating Through Neox DC as an Administrator

The Home Screen of Neox DC provides a centralized administration tool to manage Neox DC modules. Further, it allows the administrator to perform configuration for User, Campaign, List, Inbound, Service & Feature, Call Time, and so on. The screen is bifurcated into: Navigation Area, Work Area, and Menu Options.

1. Navigation Area - Displays menu options available in DC provided by Neox. Administrator can access menus and their options from the navigation area to perform various operations.

Following menus are available in Neox DC:

- User Management
- Campaign Management
- List Management
- Inbound Management
- Service & Feature
- Call Time Management
- ACL Management
- Report Management
- Bulk Operations
- Phones
- System Management
- Logout

2. Work Area - Work Area provides information that is related to the selections in navigation area. All module wise configurations are performed in this area.

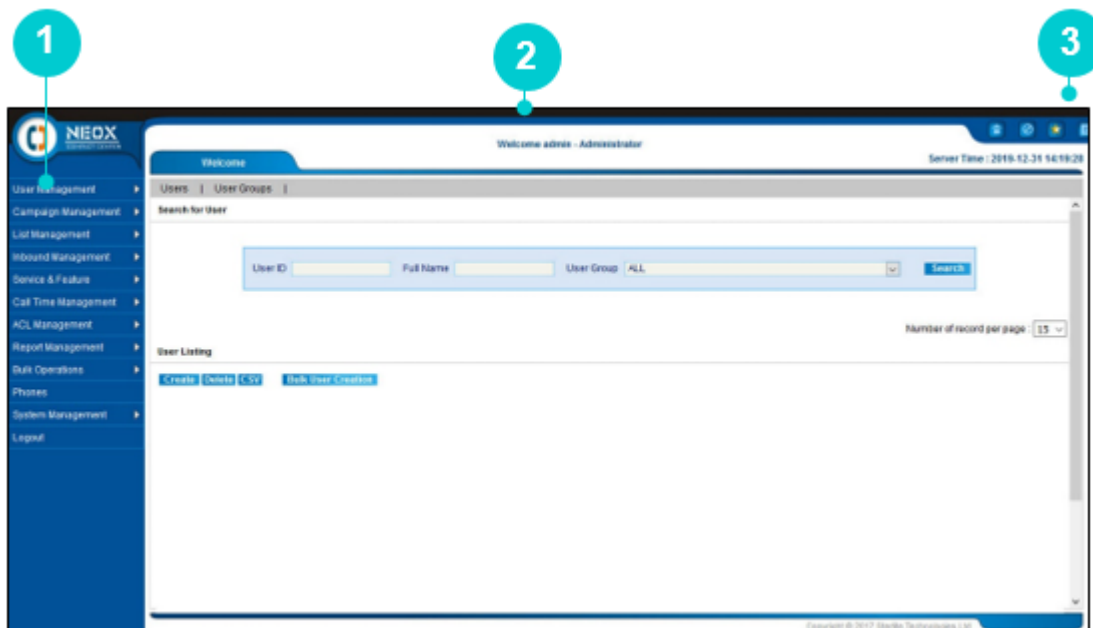





Figure 8 Neox DC Navigation Area, Work Area and Menu Options

3. Other Options – Displays other options:



Figure 9 Other menu options

-  Admin - Displays home screen.
 -  Dashboard - Displays dashboard for analysis.
 -  License - Displays license information.
- To apply new license:
 - Replace old license key with new license key.
 - Click **Apply**.
 - After the license key is applied, then license information, such as License Key Validity Date, Number of Agents, and Number of Live Agents are displayed. Additionally, Open Source and Third Party Licenses details are displayed.

License

License

License Detail

License Key *

gR8v62P7s1K138C7g0Bp02sV70F6+8wC71121aQ7*oDy=8888888#u8K2bc0f8s0p8y0w88u.888r88
 82sC7D8+u888d7a8w+8888888r7yL888e878L8+888e87s/vf88877s+L8888p7788+g8


APPLY
CLEAR

View License Information	
Validity Date	2051-11-07
Number of Agents	200
Number of Live Agents	55

Open Source and Third Party Licenses

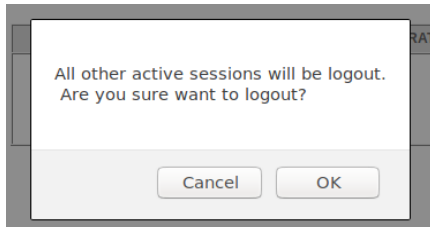
✓ Sterlite uses certain open source components in Neox and use of the said open source components are subject to terms and condition of the respective open source license under which the same are made open source.

Figure 10 License details

-  Logout - Logs out from the application.

 **Note**

With SSO enabled, a confirmation message appears. Click **OK** to confirm the logout action. To cancel the logout action, click the **Cancel** tab.



3. User Management

This chapter provides information about User Management that allows configuring User Groups, Users, and Parking Slot. In Neox DC, User Group is created and access is given for Campaigns, Inbound Groups, and Group Shifts, Agent Status, and Viewable groups. Users are bind with the User Group, where they get access to the associated components. You are also allowed to create Parking Slots, where the incoming calls are parked, when an agent is busy or could not receive the call.

Contents:

- *Users*
- *User Groups*
- *Parking Slot*

3.1 Users

This section provides information on configuring and managing the Users and delegating the access rights.

Note

It is mandatory to create a User Group before creating a User. Create a User from *User Management>>User Groups*.

There are two ways of creating users:

- Single User Creation - Provides a way to create a single user.
- Bulk Users Creation - Provides a way to create multiple users.

To manage Users, do the following steps:

- *Creating Single User*
- *Creating Bulk Users*
- *Updating, Searching, and Deleting Users*
- *Downloading CSV*

Contents:

- *Creating Single User*
- *Creating Bulk Users*

3.1.1 Creating Single User

To create a new user:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **User Management**, and then click **Users**.

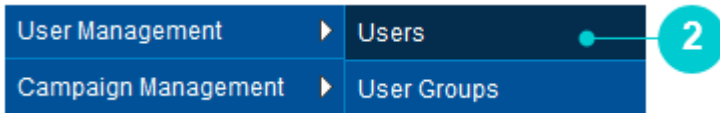


Figure 11 Users menu

3. Users screen appears. By default, only admin profile is available who has got the right to perform all operations in Neox DC. An admin profile belongs to the “Default-ADMIN” user group.
4. The screen is bifurcated into two sections; Search for User and User Listing.
 - Search for User - Provides a way to search user details using search criteria.
 - User Listing - Provides a list view of existing Users created in the system, such as User Id, Full Name, Group, Live Agent, Callback Count, Active/Inactive status, and BLOCK/UNBLOCK users. Additionally, you can update, search, delete, activate/deactivate users, and BLOCK/UNBLOCK users and view details of a User by clicking its USERID. You can also sort the user listing by clicking the column header, such as USER ID, FULL NAME, LEVEL and GROUP column.
5. To create a new user, click **Create**.

 A screenshot of the 'User Management' web interface. The top navigation bar shows 'Users' selected. Below it, there's a 'Search for User' section with input fields for 'User ID', 'Full Name', and 'User Group' (set to 'ALL'). There are also dropdowns for 'Status' and 'Block'. A 'Search' button is present. Below this is the 'User Listing' section, which includes a table with columns: USER ID, FULL NAME, GROUP, LIVE AGENT, CALLBACK COUNT, ACTIVE/INACTIVE, BLOCK/UNBLOCK, MODIFY, and DELETE. The 'Create' button is highlighted with a red box.


	USER ID	FULL NAME	GROUP	LIVE AGENT	CALLBACK COUNT	ACTIVE/INACTIVE	BLOCK/UNBLOCK	MODIFY	DELETE
<input type="checkbox"/>	admin	Admin	Default-ADMIN	●	0	-	■		-
<input type="checkbox"/>	U3001	Default - Agent	Default-ADMIN	●	0	■	■		✗
<input type="checkbox"/>	tal	tal	Default-ADMIN	●	0	■	■		✗
<input type="checkbox"/>	tal_admin	tal_admin	Default-ADMIN	●	0	■	■		✗
<input type="checkbox"/>	U5001	u5001	Default-AGENT	●	0	■	■		✗

Figure 12 Create User

6. Add a New User screen appears. Enter the parameters as given in the table.

Figure 13 Create User

Table 1 Create Single Use parameters

Parameters	Description
User ID*	Set a unique user id to allow the user's access to Neox DC. The minimum length of user id should be 2 characters and maximum length should be 8 digits.
Password*	Set a password for the user's account to allow access to Neox DC. It is recommended to create a password with steps below. <ul style="list-style-type: none"> Allowed characters are A-Z, a-z, 0-9, dash(-), @, dot(.) and underscore(_). Password must start and end with A-Z, a-z, or 0-9. The length of the Password must be 6 to 20 characters long. Password must combine uppercase and lowercase letters, numbers, and special characters.
Full Name*	Enter the full name of the user. <hr/> <p> Note The minimum length of the first name is 2.</p>
User Group*	Select a user group to associate the user to that group.
User Type*	Select an Agent or Admin type for the user. <ul style="list-style-type: none"> Admin - All specified rights are applicable to the Admin staff.

Parameters	Description
	<ul style="list-style-type: none"> Agent - Only the specified access rights are applicable to the agent.

- Click **Submit**.
- A confirmation message appears. Click **Ok**.
- The newly created user is displayed on the User Listing.
- You can activate/inactivate the user by clicking **Active/Inactive**. Here, green indicates “Active”, whereas red indicates “Deactive” users.

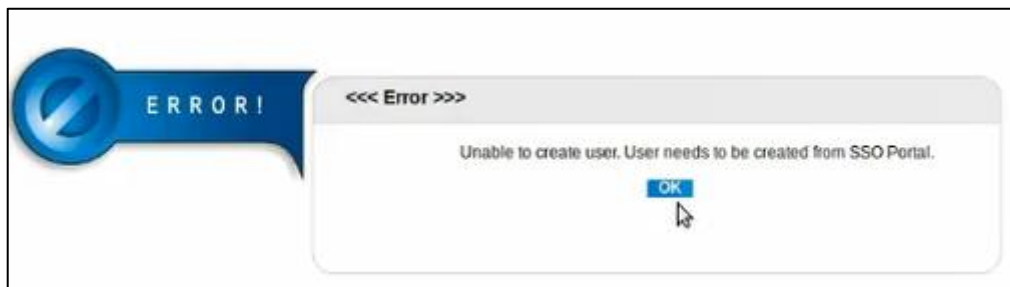
The screenshot shows a 'User Listing' interface with a table of users. The table has columns for USER ID, FULL NAME, GROUP, LIVE AGENT, CALLBACK COUNT, ACTIVE/INACTIVE, BLOCK/UNBLOCK, MODIFY, and DELETE. The 'ACTIVE/INACTIVE' column is highlighted with an orange box. The users listed are: admin (Active), U3001 (Inactive), tai (Active), tai_admin (Active), and U5001 (Active). The LIVE AGENT column shows red dots for U3001 and U5001, and green dots for the others. The CALLBACK COUNT is 0 for all users. The BLOCK/UNBLOCK column has green squares for all users. The MODIFY column has an edit icon for all users. The DELETE column has a minus sign for admin and a red X for the others.

	USER ID	FULL NAME	GROUP	LIVE AGENT	CALLBACK COUNT	ACTIVE/INACTIVE	BLOCK/UNBLOCK	MODIFY	DELETE
<input type="checkbox"/>	admin	Admin	Default-ADMIN	●	0	-	■	✎	-
<input type="checkbox"/>	U3001	Default - Agent	Default-ADMIN	●	0	■	■	✎	✗
<input type="checkbox"/>	tai	tai	Default-ADMIN	●	0	■	■	✎	✗
<input type="checkbox"/>	tai_admin	tai_admin	Default-ADMIN	●	0	■	■	✎	✗
<input type="checkbox"/>	U5001	u5001	Default-AGENT	●	0	■	■	✎	✗

Figure 14 Activate/Deactivate User

Note

With SSO enabled, you cannot create the user through the application. The user needs to be created in the Keycloak. Clicking the **Create** option displays the following error message.



3.1.2 Creating Bulk Users

In addition to creating a single user, Neox DC allows bulk creation of users. To create multiple users:

1. Log in to Neox DC.
2. In the Navigation Area, click User Management, and then click Users.
3. To create multiple users, click **Bulk User Creation**.

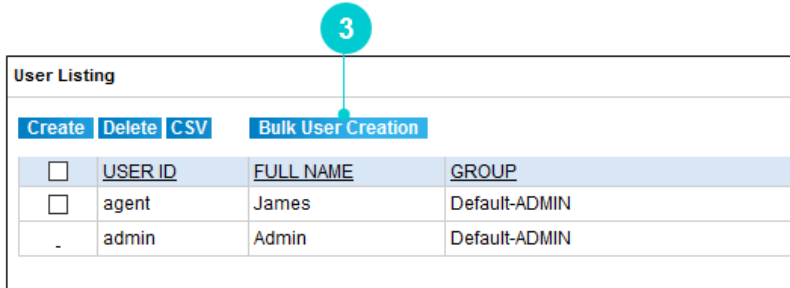


Figure 15 Bulk User Creation

4. Bulk User Creation screen appears. Enter the parameters as shown in the table.

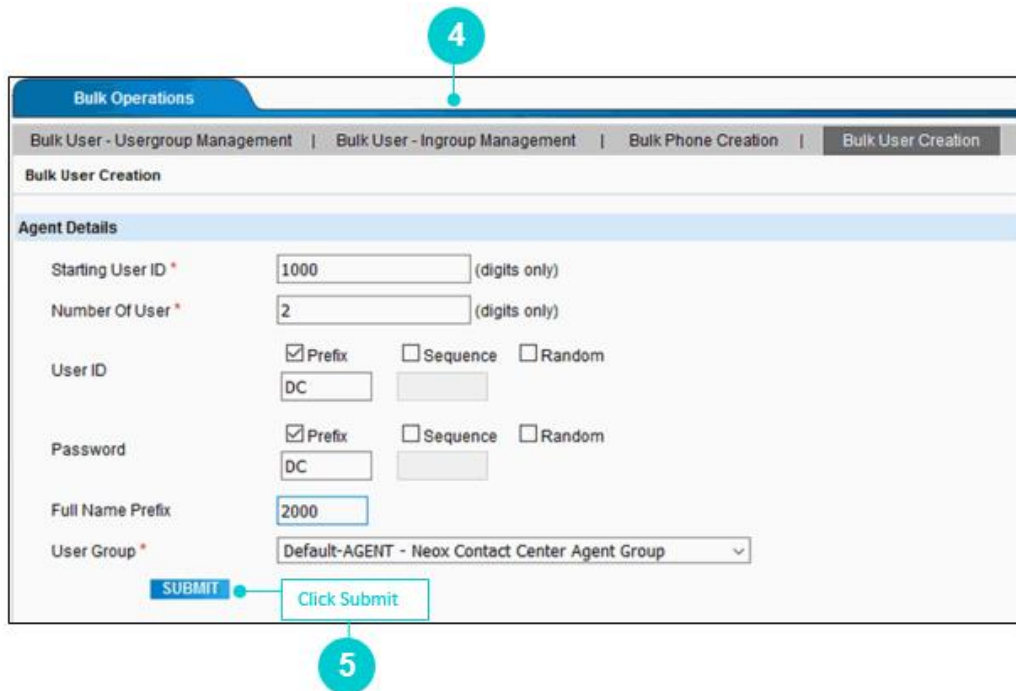




Figure 16 Creating Bulk Users

Table 2 Creating Bulk Users Parameters

Parameters	Description
Starting User ID*	Enter a user id to allow the user’s access to Neox DC. This will create user ids based on the number of users count, followed by User ID (Prefix/ Sequence/Random).

Parameters	Description
	<p>For example, Let's say: Starting User ID = 1000 Number of User= 2 User ID (Prefix)=DC On saving the details, two users are created with user id as follows:</p> <ul style="list-style-type: none"> • DC1000 • DC1001 <hr/> <p> Note</p> <ul style="list-style-type: none"> • The minimum length of user id is 3 digits and maximum length is 20 digits. • User ID Sequence must have 3 digits.
Number Of User*	<p>Define the number of users that are created during the bulk creation process.</p> <p>For example, if Number of Users is "2", then 2 users are created based on the configuration.</p> <hr/> <p> Note</p> <ul style="list-style-type: none"> • You cannot create a number of agents more than the specified license key.
User ID	<p>Defines the user id used by the agent to log in to DC. You can create user id in three ways:</p> <ul style="list-style-type: none"> • Prefix - This adds a prefix to the user id. For example, you want to create 2 users. Suppose, 1000 is the Starting User ID and "DC" is the Prefix, then DC is added as a prefix to the user ids and the user ids will be DC1000 and DC1001. • Sequence - This creates user id in sequence. For example, you want to create 2 users and 1000 is the Starting User ID, then two users are created in sequence that is 1000 and 1001. • Random - This creates user id randomly.
Password*	<p>Set a password for the user's account to allow access to Neox DC. You can create password in three ways:</p> <ul style="list-style-type: none"> • Prefix: This adds a prefix to the password. • Sequence: This creates a password in sequence.

Parameters	Description
	<ul style="list-style-type: none"> Random: This creates a password randomly. <p>The minimum length of password should be 2 characters and maximum length 8 digits.</p> <p>It is recommended to create a password of at least 8 characters and must contain at least 1 lowercase, UPPERCASE, and one number.</p>
Full Name Prefix*	<p>Enter a prefix to add to the full name of the user.</p> <p>For example, First Name Prefix is 2000 and Starting User ID is 1000 for 2 users. Now, when 2 users are created, then their First Names are 20001000 and 20001001.</p>
User Group*	Select a user group to associate the user to that group.

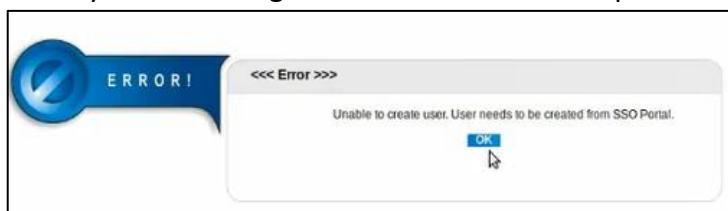
- After entering all parameters, click **Submit**.
- A confirmation message appears. Click **Ok**.
- Users are created as shown in the following image.
- By default, users are active and indicate in “Green” color. To deactivate, click the status. This will deactivate the user and the deactivate user is indicated in “Red” color.

USER ID	FULL NAME	GROUP	LIVE AGENT	CALLBACK COUNT	ACTIVE/INACTIVE	BLOCK/UNBLOCK	MODIFY	DELETE
-	admin	Admin	Default-ADMIN	0	-	█	ⓘ	-
<input type="checkbox"/>	U3001	Default - Agent	Default-ADMIN	0	█	█	ⓘ	✖
<input type="checkbox"/>	tal	tal	Default-ADMIN	0	█	█	ⓘ	✖
<input type="checkbox"/>	tal_admin	tal_admin	Default-ADMIN	0	█	█	ⓘ	✖
<input type="checkbox"/>	U5001	u5001	Default-AGENT	0	█	█	ⓘ	✖

Figure 17 Activate/Deactivate users

Note

With SSO enabled, you cannot create bulk users through the application. The user needs to be created in the Keycloak. Clicking the **Bulk User Creation** option displays the following error message.



3.1.3 Updating, Searching, and Deleting Users

In addition to performing User creation, you may also update, search, and delete (single and bulk) Users.

3.1.3.1 Updating Users

To update:

1. Click **Edit** corresponding to the user.
2. Modify a user screen appears.

The screenshot shows the 'Modify a User' form with the following sections and fields:

- Agent Details:**
 - User ID: DC1000
 - Password: [Masked] Strength: [Indicator]
 - Full Name: 20001000
 - User Group: Default-AGENT - Neox Contact Center Agent Group
 - Active: Enable
 - User Type: Agent Admin
- Agent Configuration:**
 - Agent Choose Ingroups: Enable
 - Agent Choose Blended: Enable
 - Agent-Only Callbacks: Enable
 - Closer Default Blended: Enable
 - Recording Override: DISABLED
 - Allow Permanent Login: Enable
- Alert Detail:**
 - Alert Enabled: 0
 - Allow Alerts: Enable
- Inbound Groups:**

Inbound Group	Rank	Calls
<input checked="" type="checkbox"/> AGENTDIRECT - AGENTDIRECT	1	0
<input checked="" type="checkbox"/> B2C - B2C	1	0
<input checked="" type="checkbox"/> BranchDesk - Branch Desk	1	0
<input checked="" type="checkbox"/> Domestic - Domestic	1	0
<input checked="" type="checkbox"/> International - International	2	0
<input checked="" type="checkbox"/> Services - Services	1	0
<input checked="" type="checkbox"/> TechnicalQuery - Technical Query	1	0

Buttons at the bottom: **SUBMIT** (5) and **DELETE** (6).

3. You can modify user details, such as Password, Full Name, User Group, Active status, and User Type.
4. You can also modify Agent Configuration, Alert Details, and Inbound Groups as given in the table.

Table 3 Modify Users Parameters

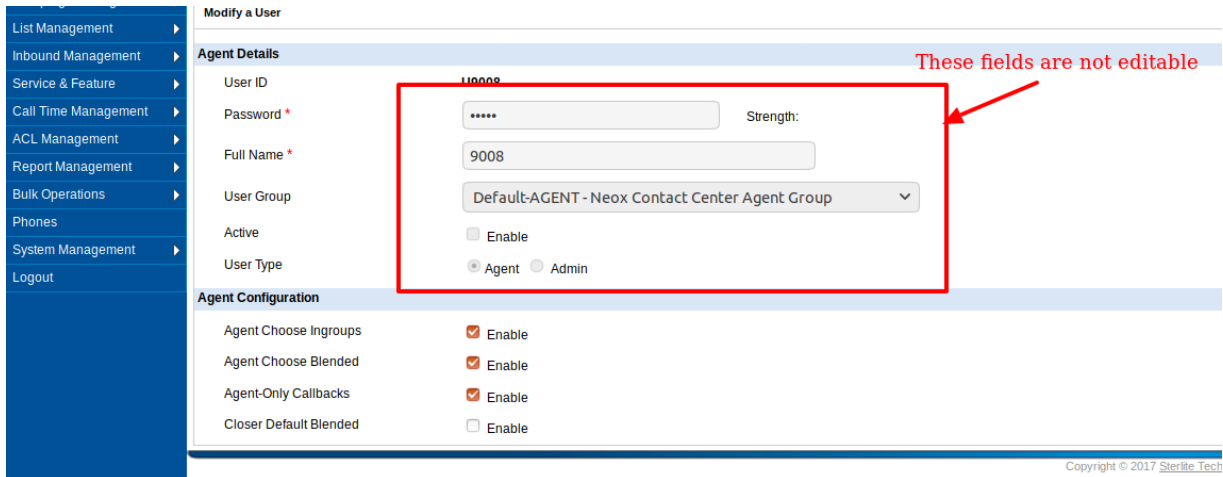
Parameters	Description
Agent Configuration	
Agent Choose Ingroups	Allows the user to choose the Ingroups that they will receive calls from, when they login to a CLOSER or INBOUND campaign. Otherwise, the Manager needs to set this in their user detail screen of the admin page.
Agent Choose Blended	Allows the user to choose if the agent has their campaign set to blended or not, and if not, then the default blended setting is used.
Agent-Only Callbacks	Allows an agent to set a call back, so that they are the only Agent that can call the customer back. This also allows the agent to see their call back listings and call them back any time they want to.
Closer Default Blended	Set default option of Blended on a CLOSER login screen.
Recording Override	Enabling this will override recording. If it is disabled anywhere else and will record the Agent/Campaign's calls.
Allow Permanent Login	Allows agent to log in permanently. If this field is enabled, then that agent cannot be logged out from the system. Such agents are called Live Agents.
Alert Detail	
Alert Enabled	Allows the agent to enable alerts of the calls on the web browser.
Allow Alerts	Allows the agent to set browser alerts, for the calls that come into their session.
Inbound Groups - Allows receiving calls, if you have selected the CLOSER campaign. You will also be able to set the rank, or skill level, for each of the inbound groups, as well as being able to see the number of calls received from each inbound group for this specific agent. Also, agent gets a rank for each inbound group. These ranks can be used for preferred call routing when that option is selected in the in-group screen.	

5. Click **Submit** to save the details.
6. If you want to delete the user, click **Delete**.

 **Note**

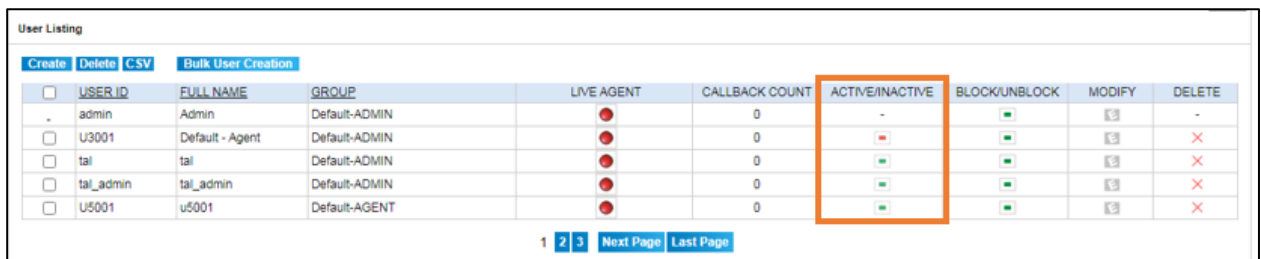
With SSO enabled:

- you are allowed to update only **Agent Configuration** parameters. The **Agent Profile** section is *disabled* and cannot be updated. Refer to the highlighted section in the below figure. You can update this information through Keycloak.



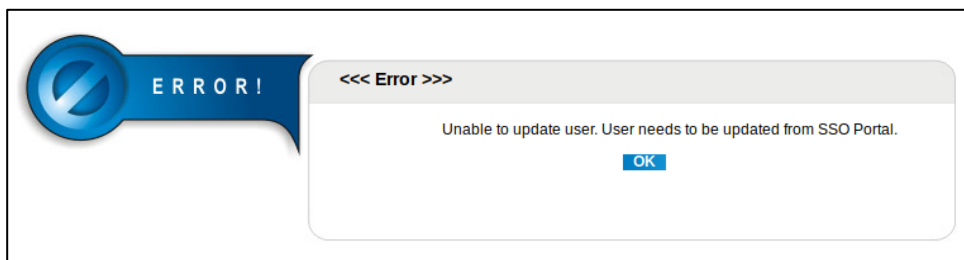
The screenshot shows the 'Modify a User' page. On the left is a navigation menu with items like 'List Management', 'Inbound Management', etc. The main content area is titled 'Modify a User'. It is divided into two sections: 'Agent Details' and 'Agent Configuration'. The 'Agent Details' section contains fields for 'User ID' (U0008), 'Password', 'Full Name' (9008), 'User Group' (Default-AGENT - Neox Contact Center Agent Group), 'Active' (checkbox), and 'User Type' (Agent/Admin). A red box highlights the 'Password', 'Full Name', and 'User Group' fields, with a red arrow pointing to it from the text 'These fields are not editable'. The 'Agent Configuration' section has several checkboxes: 'Agent Choose Ingroups' (checked), 'Agent Choose Blended' (checked), 'Agent-Only Callbacks' (checked), and 'Closer Default Blended' (unchecked). A copyright notice 'Copyright © 2017 Sterlite Tech' is at the bottom right.

- You cannot change the status of the user through the application. It needs to be changed in the Keycloak. Clicking the **Active/Inactive** option displays the following error message.



The screenshot shows a 'User Listing' table with columns: USER ID, FULL NAME, GROUP, LIVE AGENT, CALLBACK COUNT, ACTIVE/INACTIVE, BLOCK/UNBLOCK, MODIFY, and DELETE. The 'ACTIVE/INACTIVE' column is highlighted with an orange box. Below the table are pagination controls: '1 2 3 Next Page Last Page'.

	USER ID	FULL NAME	GROUP	LIVE AGENT	CALLBACK COUNT	ACTIVE/INACTIVE	BLOCK/UNBLOCK	MODIFY	DELETE
<input type="checkbox"/>	admin	Admin	Default-ADMIN		0	-			-
<input type="checkbox"/>	U3001	Default - Agent	Default-ADMIN		0				
<input type="checkbox"/>	tal	tal	Default-ADMIN		0				
<input type="checkbox"/>	tal_admin	tal_admin	Default-ADMIN		0				
<input type="checkbox"/>	U5001	u5001	Default-AGENT		0				



The screenshot shows an error dialog box with a blue 'ERROR!' icon on the left. The main text of the dialog says '<<< Error >>>' followed by 'Unable to update user. User needs to be updated from SSO Portal.' and an 'OK' button at the bottom.

3.1.3.2 Searching Users

To search using filter:

1. Enter User ID/Full Name or select User Group.
2. Click **Search**.
3. System returns all Users details that contain the search term.
4. To get a list of all Users details, click **Search**.

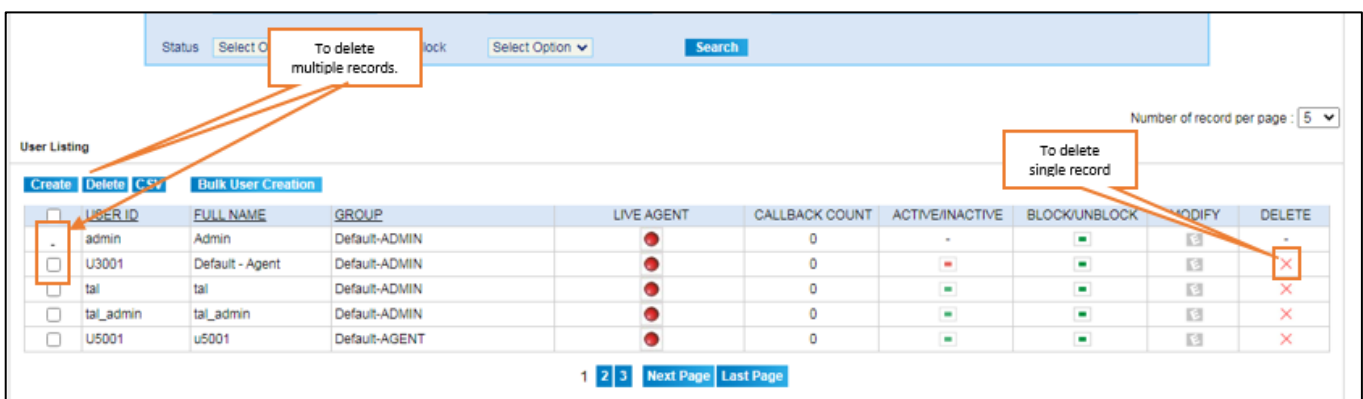
3.1.3.3 Deleting Users

Neox provides two ways of deleting the Users:

- Single User deletion – Enables deleting a single user configuration.
 1. Select a user.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Users deletion - Enables deleting multiple Users.
 1. To delete multiple users, select the users OR to delete all users, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

Note

With SSO enabled, you cannot delete single or multiple users through the application. Users' needs to be deleted in the Keycloak. Clicking the **Delete** option displays the following error message.

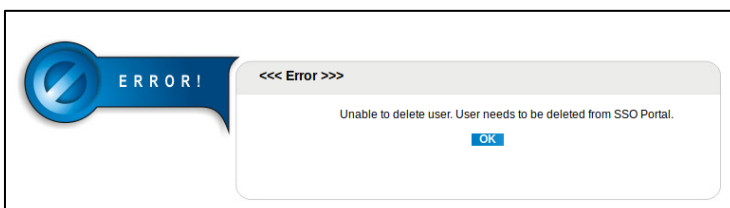


The screenshot shows a 'User Listing' interface with a table of users. The table has columns: USER ID, FULL NAME, GROUP, LIVE AGENT, CALLBACK COUNT, ACTIVE/INACTIVE, BLOCK/UNBLOCK, MODIFY, and DELETE. The rows are:

USER ID	FULL NAME	GROUP	LIVE AGENT	CALLBACK COUNT	ACTIVE/INACTIVE	BLOCK/UNBLOCK	MODIFY	DELETE
admin	Admin	Default-ADMIN	●	0	-	■	⚙	✖
U3001	Default - Agent	Default-ADMIN	●	0	■	■	⚙	✖
tal	tal	Default-ADMIN	●	0	■	■	⚙	✖
tal_admin	tal_admin	Default-ADMIN	●	0	■	■	⚙	✖
U5001	u5001	Default-AGENT	●	0	■	■	⚙	✖

Annotations in the image:

- 'To delete multiple records.' points to the 'DELETE' column header.
- 'To delete single record' points to the 'DELETE' button in the first row.



The error message dialog box contains the following text:

ERROR!

<<< Error >>>

Unable to delete user. User needs to be deleted from SSO Portal.

OK

3.1.4 Downloading CSV

To download CSV:

1. Click **CSV**.
2. Save file for future use.
3. The file contains page-wise data as displayed on the screen.

3.2 User Groups

This section provides information on configuring and managing User Groups to delegate common privileges such as Shift Management, Campaign, and Inbound groups to the users.

 **Note**

The user group are assigned to the user from *User Management>>Users*.

To manage User Groups, do the following steps:

- *Creating User Groups*
- *Updating, Searching, and Deleting User Groups*

Based on the status of *SSO (Single-Sign-On) via Keycloak* – enabled or disabled, User Creation, Update and Delete operation process differs.

3.2.1 Creating User Groups

To create a new User Groups:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **User Management**, and then click **User Groups**.

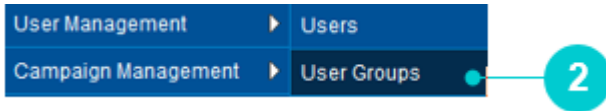


Figure 18 User Groups menu

3. User Groups screen appears. By default, only default admin user group “Default-ADMIN” is available who has got the right to perform all operations in Neox DC.
4. The screen is bifurcated into two sections; Search for User Group and User Group Listing.
 - Search for User Group - Provides a way to search user details using search criteria.
 - User Group Listing- Provides a list view of existing User Groups created in the system with the details such as User Group, Group Name, and Callback Account. Additionally, you can update, search, and delete user groups and view details by clicking its USER Group.
5. To create a new User Group, click **Create**.

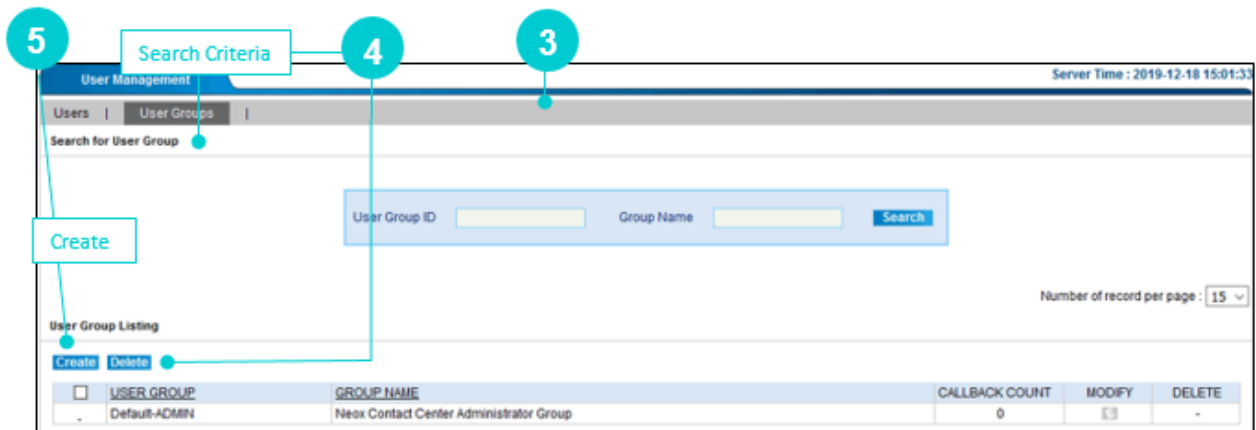


Figure 19 Create User Groups

6. Add a New User Group screen appears. Enter the parameters as given in the table.

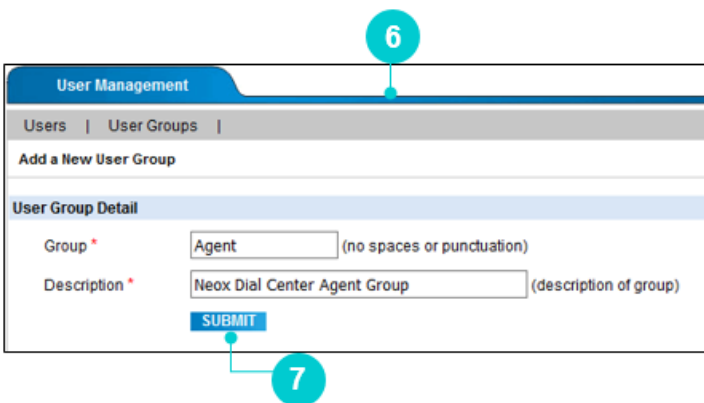


Figure 20 Create User Group

Table 4 Create User Group parameters

Parameters	Description
Group*	Enter the group name.
Description*	Enter a brief description about the group.

7. Click **Submit**.
8. A confirmation message appears. Click **Ok**.
9. The newly created user group is displayed on the User Listing.



User Group Listing					
		GROUP NAME	CALLBACK COUNT	MODIFY	DELETE
<input type="checkbox"/>	USER_GROUP				
<input type="checkbox"/>	Agent	Neox Dial Center Agent Group	0		

Figure 21 User Groups Listing

Note

With SSO enabled and in `astguiclient.conf` file configuration, if `Is_Role_Create_On_Keycloak => 1`, a Role/Profile gets created in Keycloak during the run-time. If this value is 0, the Role/Profile gets created only in the application and not in the Keycloak.

3.2.2 Updating, Searching, and Deleting User Groups

In addition to performing User Group creation, you may also update, search, and delete (single and bulk) User Groups.

3.2.2.1 Updating User Groups

To update:

1. Click **Edit** corresponding to the User Group.
2. Modify a User Group screen appears.

The screenshot displays the 'User Management' interface. At the top, there is a navigation bar with the following options: 'Show User', 'Add New User', 'Show User Group', 'Add New User Group', 'Parking Slot', 'Add New Parking Slot', and 'Bulk User Creation'. The 'Server Time' is shown as 2020-02-25 12:38:21. The main content area is titled 'User Group Detail'. It contains the following fields and options:

- Group:** A dropdown menu.
- Description:** A text input field containing 'Neox Dial Center Agent Group' with a '(description of group)' placeholder.
- Shift Enforcement:** A dropdown menu set to 'OFF'.
- Recording Override:** A dropdown menu set to 'DISABLED'.
- Allowed Campaigns:** A section with several checkboxes:
 - ALL-CAMPAIGNS - USERS CAN VIEW ANY CAMPAIGN
 - 24Online - 24Online
 - HelpDesk - HelpDesk
 - NeoxPre - NeoxPresales
 - NeoxSupp - NeoxSupport

Figure 22 Modify User Group

3. You can modify User Group details, such as Description, Shift Enforcement, and Recording Override.
4. You can also modify Allowed Campaigns, Allowed Inbound Groups, Group Shifts, and Agent Status Viewable Groups as given in the table.

Table 5 Update User Groups Parameters

Parameters	Description
Shift Enforcement	<p>Restrict agent login based on the shifts, such as:</p> <ul style="list-style-type: none"> • OFF – It does not enforce shifts at all. • START - Enforce the login time, but will not affect an agent that is running over their shift time, if they are already logged in. • ALL- Enforce shift start time and logs out the agent after they run over the end of their shift time.
Agent Configuration	
Allowed Campaigns	A list of campaigns to which members of this user group can log in to. The ALL-CAMPAIGNS option allows the users in this group to see and log in to any campaign on the system.
Allowed Inbound Groups	A list of campaigns to which members of this user group can log in to.
Group Shifts	A list of shifts that can restrict the agents login time on the system
Agent Status Viewable Groups	<p>A list of user groups and user functions to which members of this user group can view the status of, as well as transfer calls to inside of the agent screen.</p> <ul style="list-style-type: none"> • The ALL-GROUPS option allows the users in this group to see and transfer calls to any user on the system. • The CAMPAIGN-AGENTS option allows users in this group to see and transfer calls to any user in the campaign that they are logged into. • The NOT-LOGGED-IN-AGENTS option allows all users in the system to be displayed, even if they are not logged-in currently. • The Default-ADMIN - Neox Dial Center Administrator Group • The Default-AGENT - Neox Dial Center Agent Group • The Support - suport_ippbx

5. Click **Submit** to save the details.
6. If you want to delete the User Group, click **Delete**.

3.2.2.2 Searching User Groups

To search using filter:

1. Enter User Group ID/ User Group Name.
2. Click **Search**.
3. System returns all User Groups details that contain the search term.
4. To get a list of all User Groups details, click **Search**.

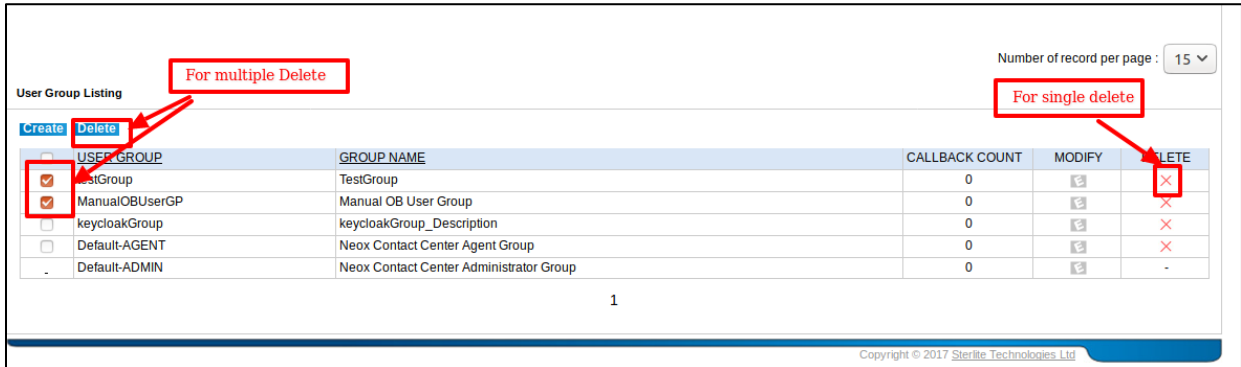
3.2.2.3 Deleting User Groups

Neox provides two ways of deleting the User Groups:

- Single User Group deletion – Enables deleting a single User Group configuration.
 1. Select a User Group.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple User Groups deletion - Enables deleting multiple User Groups.
 1. To delete multiple User Groups, select the User Groups OR to delete all User Groups, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

 **Note**

- With SSO enabled and in astguiclient.conf file configuration, if *Is_Role_Create_On_Keycloak* => 1, you cannot delete a single or multiple User group through the application. The User group needs to be deleted in the Keycloak. Clicking the **Delete** option displays the following error message.



User Group Listing

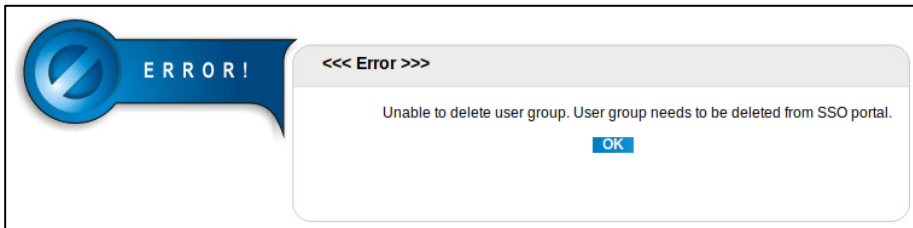
Number of record per page : 15

Create Delete

USER GROUP	GROUP NAME	CALLBACK COUNT	MODIFY	DELETE
<input checked="" type="checkbox"/> TestGroup	TestGroup	0		
<input checked="" type="checkbox"/> ManualOBUserGP	Manual OB User Group	0		
<input type="checkbox"/> keycloakGroup	keycloakGroup_Description	0		
<input type="checkbox"/> Default-AGENT	Neox Contact Center Agent Group	0		
<input type="checkbox"/> Default-ADMIN	Neox Contact Center Administrator Group	0		-

1

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ERROR!

<<< Error >>>

Unable to delete user group. User group needs to be deleted from SSO portal.

OK

- With SSO enabled and in astguiclient.conf file configuration, if *Is_Role_Create_On_Keycloak* => 0, you can delete User Profile/Role in the application. However, the same is not deleted in the Keycloak. If the same user tries to log in to the application, the system will display an appropriate error message.

3.3 Parking Slot

Note

This module is deprecated.

This section provides information on configuring and managing Parking Slot that enables the agents to park a call until the agent is available. After any agent becomes available, they can grab the call to start talking to the customer.

For example, when a patient (customer) calls in a hospital, the receptionist (agent) receives the call. If the patient asks for a specific doctor (third party/other agent), which is busy on some other call, the agent can park the call in the doctor's parking slot and receive calls from other patients.

When the doctor is available, then the doctor can grab the call and talk to the patient directly.

To manage Parking Slot, do the following steps:

- *Creating Parking Slots*
- *Updating, Searching, and Deleting Parking Slots*

3.3.1 Creating Parking Slots

To create a new Parking Slot:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **User Management**, and then click **Parking Slot**.



Figure 23 Parking Slot menu

3. Parking Slot screen appears.
4. The screen is bifurcated into two sections; Search for Parking Slot and Parking Slot Listing.
 - Search for Parking Slot - Provides a way to search Parking Slot using search criteria.
 - Parking Slot Listing- Provides a list view of existing Parking Slots created in the system with the details such as Agent name, Parking Slot Number. Additionally, you can create, update, search, and delete parking slots and view details by clicking its Agent name.
5. To create a new Parking Slot, click **Create**.

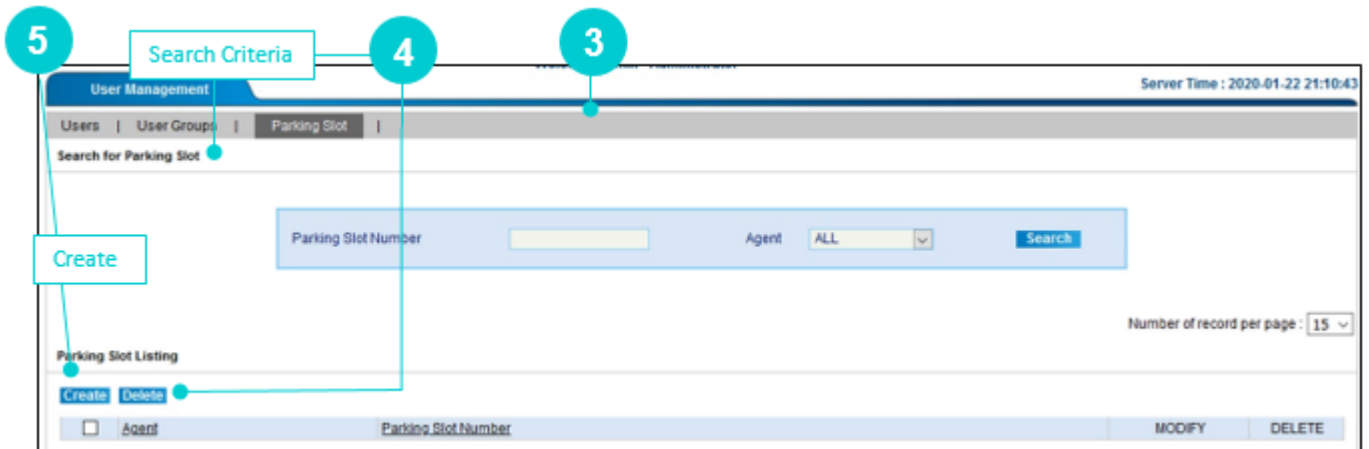


Figure 24 Create Parking Slot

6. Add a New Parking Slot screen appears.

7. Select a parking slot and agent, to assign the agent to the parking slot. By default, you can assign only three parking slots to an agent.

Add a New Parking Slot

Parking Slot Detail

Parking Slot Number *

777101
777102
777103
777104
777105
777106
777107
777108
777109
777110

Note :Already Allocated Parking Slot Number
Displayed as a read only

Agent *

agent-02

SUBMIT

Figure 25 Create Parking Slot

8. Click **Submit**.
9. A confirmation message appears. Click **Ok**.

3.3.2 Updating, Searching, and Deleting Parking Slot

In addition to performing Parking Slot creation, you may also update, search, and delete (single and bulk) Parking Slot.

3.3.2.1 Updating Parking Slot

To update:

1. Click **Edit** corresponding to the Parking Slot.
2. Modify a Parking Slot screen appears. Modify details as required.
3. Click **Submit** to save the details.
4. If you want to delete the Parking Slot, click **Delete**.

3.3.2.2 Searching Parking Slot

To search using filter:

1. Enter Parking Slot Number or select Agent.
2. Click **Search**.
3. System returns Parking Slots details that contain the search term.
4. To get a list of all Parking Slots details, click **Search**

3.3.2.3 Deleting Parking Slots

Neox provides two ways of deleting the Parking Slots:

- Single Parking Slot deletion – Enables deleting a single Parking Slot configuration.
 1. Select a Parking Slot.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Parking Slots deletion - Enables deleting multiple Parking Slots.
 1. To delete multiple Parking Slots, select the User Groups OR to delete all Parking Slots, select the header column.
 2. Click **Delete**.
 3. Click **Ok** to confirm.

4. Campaign Management

This chapter provides information about Campaign Management that is a comprehensive solution to manage inbound and outbound calls. Campaign Management enables the administrator to create multiple campaigns for managing the calling process at different schedules. Administrator can imply different rules on calls, control their executive, and schedule campaign based on requirements. After every call, the administrator can track the calls through the Call Detail Records (CDR). Through the Campaign Management, you can create Campaign, Pause Codes to enable agent pause calls after given the reason, List Mix to manage leads, Dynamic Prompt to ensure callers are connected through IVR, Conference to allow conference calls between agent, customer, and another caller, and SMS API gateway to send SMS.

Contents:

- *Campaigns*
- *Pause Codes*
- *List Mix*
- *Dynamic Prompt*
- *Conference*
- *SMS API Gateway*

4.1 Campaigns

This section provides details about configuring Campaigns that helps in breaking down the calling components based on the requirements. It helps in organizing calls by creating different campaigns, engaging customers through prompt files, configuring call back on daily/global basis, call disposition, inbound group configuration for transfer and so on. Campaign helps in organizing calls effectively to provide better customer experience.

Contents:

- *Creating Campaigns*
- *Campaigns List View*
- *Updating, Searching, and Deleting Campaigns*

4.1.1 Creating Campaigns

To create a new Campaign:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Campaign Management**, and then click **Campaigns**.



Figure 26 Campaigns menu

3. Campaign screen appears.
4. The screen is bifurcated into two sections; Search for Campaign and Campaign Listing.
 - Search for Campaign - Provides a way to search Campaign details using search criteria.
 - Campaign Listing- Provides a list view of existing Campaign created in the system, including the details such as Campaign ID, Name, Dial Method, Auto Alt-Dial, Callback Count, Active/Inactive, URL Config, SMS Config, Email Config, and CRM Notify Config. camp_1 Default-Campaign PREDICTIVE is the default campaign provided. Additionally, you can update, search, and delete campaigns and view details of a Campaign by clicking its CAMPAIGNID.
5. To create a new Campaign, click **Create**.

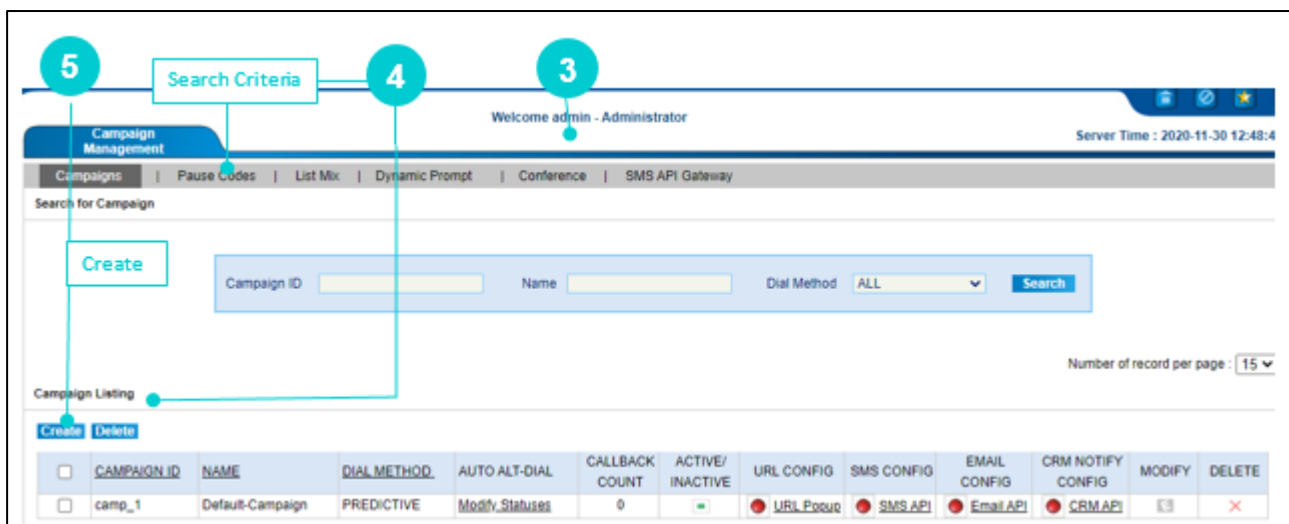


Figure 27 Create Campaign

6. Add a New Campaign screen appears. Enter the parameters as given in the table.

The screenshot shows the 'Add a New Campaign' form with the following fields and options:

- Campaign Detail:**
 - Campaign ID: [Text Input]
 - Campaign Name: [Text Input] (Name Should Be Unique)
 - Active: Enable
 - Time Zone: 12pm-5pm - default 12pm to 5pm calling
 - Next Agent Call: Most Idle
 - Script: NONE
- Prompt Files:**
 - Park Music-on-Hold File: Browse... No file selected. (Please upload file with .wav or .mp3 extension)
 - Play Welcome Message: NEVER
 - Welcome Message Filename: Browse... No file selected. (Please upload file with .wav or .mp3 extension)
 - MOH Message Filename: Browse... No file selected. (Please upload file with .wav or .mp3 extension)
- Callback Configuration:**
 - Scheduled Callbacks: Enable
 - Maximum CallBack Hops:
 - Per Day Configuration:
 - Maximum Callback Hops for Fail Calls: 0 (0 means no limit)
 - Maximum Callback Hops for Success Calls: 0 (0 means no limit)
 - Global Configuration:
 - Maximum Callback Hops for Fail Calls: 0 (0 means no limit)
 - Maximum Callback Hops for Success Calls: 0 (0 means no limit)
- Call Disposition Configuration:**
 - Allow Auto Disposition: Enable (This call disposition configuration has highest priority, if this configuration is enabled all other call disposition configurations are disabled)
 - Allow Disposition for Fail Calls: Enable
 - Allow Time Bound Disposition: 0 (0 means time bound disposition is disabled)
- Inbound Group Configuration for Transfer:**
 - Allow Transfer To Inbound Group: Enable
- Minimum Hopper Level:**
 - Minimum Hopper Level: 100
- Dial Method:**
 - Campaign Type: MANUAL
 - Auto Dial Level: 0
 - Manual Preview Dial: DISABLED
 - Alt Number Dialing: N
- Call Route on Hangup:**
 - Customer Feedback Menu: Select Feedback Menu

Submit

Figure 28 Create Campaign

Table 6 Create Campaign Parameters

Parameters	Description
Campaign ID*	Enter a short name of the campaign. It is not editable after initial submission, cannot contain spaces, and must be between 2 and 8 characters in length.
Campaign Name*	Enter a unique name of the campaign. It must be between 6 and 40 characters in length and only dash (-) is allowed in the name.
Active	Make a Campaign Active or Inactive. If a campaign is inactive, then it cannot be used and the agent cannot login.
Time Zone	Select the Time Zone for the Campaign according to your work time zone. Agent after their defined time zone will not be able to log in.
Next Agent Call	Select a mechanism to assign the call to the next available agent. Campaign level “Neox Agent Call” is used in Predictive calling. The options are: <ul style="list-style-type: none"> • Random - Orders by the random update value in the database. • Round Robin – Orders by the last time an agent was sent a call. This results in assigning the same number of calls to all agents. • Number of Calls – Call is distributed among the agent (until all agents get equal number of calls) for that specific inbound group. Least calls first. • Most Idle – Orders by the amount of time agent has been actively waiting for a call. • Inbound Group Rank – Orders by the rank given to the agent for the specific inbound group. Highest to Lowest.
Script	Select a script to display on the agent’s screen for this campaign. Select NONE to show no script for this campaign. This script is displayed on the Agent’s login screen under the Screen tab.
Prompt Files – Prompt file is used to play audio files in different scenarios, such as to play welcome message for the caller, call put on hold or parked and so on.	
Park Music-on-Hold File	Upload a valid prompt file to play while a call is put on hold or parked.
Play Welcome Message	Select an option to play the defined welcome message. The options are: <ul style="list-style-type: none"> • ALWAYS – Plays welcome file very time. • NEVER – Never plays a file.

Parameters	Description
	<ul style="list-style-type: none"> IF_WAIT_ONLY – Plays a welcome message only if a call is waiting.
Welcome Message Filename	Upload a welcome message file that is played when the call comes in.
MOH Message Filename	Upload a music on hold file that is played when the call is put on hold.
Callback Configuration – Callback configuration allows the agent in configuring call back request from the customers for fail and successful calls. When the call back configuration is performed, then the agent is able to set time from the calendar to call back the customer.	
Scheduled Callbacks	Allows the agent to schedule a call back in this campaign. When this option is enabled, then only the agent is able to schedule a call back on a daily basis or globally.
Maximum Callback Hops - Per Day Configuration Set how many scheduled call back can an agent set for one day on a particular number/lead.	
Maximum Callback Hops for Fail Calls	Number of scheduled callbacks that an agent can set per day for failed calls.
Maximum Callback Hops for Success Calls	Number of scheduled callbacks that an agent can set per day for successful calls.
Maximum Callback Hops - Global Configuration It is the maximum count of callback requests an agent can register. It can be set for failed and successful calls and can be defined either as 1 week, 1 month, and 1 year until the count doesn't decrease to 0 for the logged in agent.	
Maximum Callback Hops for Fail Calls	Number of scheduled call back that an agent can set for failed calls.
Maximum Callback Hops for Success Calls	Number of scheduled call back that an agent can set for successful calls.
Call Disposition Configuration- This configuration includes various reasons/statuses of call disconnection for both incoming and outgoing calls. The Call Disposition is configured from <i>Service & Feature>>Disposition Statuses</i> .	
Allow Auto Disposition	All the calls that are handled by the agent are disposed automatically on hang-up. In this case, no disposition status is displayed on the agent's screen and the agent is again in queue for the next call. This is used when disposition status is necessary to the client.

Parameters	Description
	This call disposition configuration has the highest priority. If this configuration is enabled, all other call disposition configurations gets disabled.
Allow Disposition for Fail Calls	Select <i>Enable</i> to display Disposition statuses on the Agent's screen. All the calls that are handled by the agent, are disposed for failed calls. If not selected, then Disposition Statuses are not displayed on the Agent's screen for failed calls.
Allow Time Bound Disposition	Enter a timer for call disposition. This time is prompted on the agent's screen. If the agent disposes the call within that time, the call gets correctly disposed, else the system auto disposes the call after the configured number of seconds. Here, 0 means time bound disposition is disabled.
Inbound Group Configuration for Transfer	
Allow Transfer To Inbound Group	Allows transfer of calls from one in-group to another group, associated with the same campaign.
Minimum Hoper Level	
Minimum Hoper Level	Select the number of leads that are ready to be dialed during predictive/manual dialing.
Dial Method	
Campaign Type	<p>Defines the way about how the dialing takes place. The options are:</p> <ul style="list-style-type: none"> • MANUAL: Auto_dial_level is locked at 0 and the agent has to manually click dial next to dial next lead uploaded by the admin. • PREVIEW - User information is displayed to the agent before the call is connected to the customer. Here, agent can dial/skip/delete a call. • PROGRESSIVE - User information is displayed to the agent before the call is connected to the customer. The Agent can choose to either dial the lead, skip or to trash the lead. If no action is performed by the agent, then the system automatically dials the lead. • PREDICTIVE - As soon as the agent logs in and is available in "Ready" status, system starts calling the leads automatically. However, if the agent is in Pause Mode, then the calling goes in Pause Mode.

Parameters	Description
	<ul style="list-style-type: none"> • INBOUND_MAN - Allows the agent to dial calls manually from a campaign list, while being able to take inbound calls between manual dialed calls. • VOICE_BLASTER - All the numbers in the lead are automatically dialed and the IVR is played. Usually, it is used for broadcasting a message. For example, advertisements or marketing. <ul style="list-style-type: none"> ▪ System calls and plays IVR to the customer. <ul style="list-style-type: none"> ○ Call Menu - Select predefined call menu to play in IVR. It is configured from <i>Inbound Management>>Call Menus</i>. ○ Voice Blaster Type - If “Static”, then default IVR is played in Call Menu. If “Dynamic”, then text is converted to speech. Configured in list.
Auto Dial Level	<p>It is used to set the Call Rations for an agent, when Campaign Type is selected as PREDICTIVE or VOICE BLASTER.</p> <ul style="list-style-type: none"> • “PREDICTIVE” Campaign Type <ul style="list-style-type: none"> ▪ Agent Status “All” - System calls the customer automatically irrespective of the agent’s mode. If the number of log in agent is 5 and Auto Dial Level is 2, then system dials $5*2=10$ calls at the same time and maintains the live calls count 10 as well. ▪ Agent Status “Ready” - System calls the customer automatically only when the Agent is in “Ready” mode. If the number of agent in “Ready Status” 2 out of 5 logs in, then system dials $2*2$ (Auto Dial Level is 2) $=4$ at the same time and maintains the live calls count 4 until any agent logs off. • INBOUND_MAN Campaign Type – Agents dials the calls manually. • VOICE_BLASTER Campaign Type – System calls and plays IVR to the customer. <ul style="list-style-type: none"> ▪ Call Menu - Select predefined call menu to play in IVR. It is configured from <i>Inbound Management>>Call Menus</i>. ▪ Voice Blaster Type <ul style="list-style-type: none"> ○ If “Static”, then default IVR is played in Call Menu. ○ If “Dynamic”, then text is converted to speech. Configured in list.

Parameters	Description
Manual Preview Dial	<p>It is used when the Campaign Type is selected as "PREVIEW/INVOUND MAN". Manual Preview Dial takes three parameters:</p> <ul style="list-style-type: none"> • DISABLED - Disables this field. • PREVIEW_AND_SKIP - Agent can view the customer information and can decide whether to "Dial" or "Skip". • PREVIEW_ONLY - Agent can view the Customer information but cannot "skip".
Alt Number Dialing	This is used when the administrator wishes to dial an alternate number if the primary number is not reachable / not answered.
Call Route on Hangup	
Customer Feedback Menu	Enables the Agent to route the customers to a feedback menu after the call ends. After the call is disconnected by the Agent, default IVR is played.

7. Click **Submit**.
8. A confirmation message appears. Click **Ok**.
9. The newly created Campaign is displayed on the Campaign Listing.
10. You can activate/inactivate the user by clicking **Active/Inactive**. Here, green indicates "Active", whereas red indicates "Deactive" users.

Create		Delete											
<input type="checkbox"/>	CAMPAIGN ID	NAME	DIAL METHOD	AUTO ALT-DIAL	CALLBACK COUNT	ACTIVE/INACTIVE	URL CONFIG	SMS CONFIG	EMAIL CONFIG	CRM NOTIFY CONFIG	MODIFY	DELETE	
<input type="checkbox"/>	DC_Cam_1	Dial-Center-Campaign	PREVIEW	-	0	-	<input type="radio"/> URL Popup	<input type="radio"/> SMS API	<input type="radio"/> Email API	<input type="radio"/> CRM API			

Figure 29 Activate/Deactivate User

4.1.2 Campaigns List View

After the campaign is created, it is displayed in the List View. On this screen, you can configure the following:

- *URL CONFIG*
- *SMS CONFIG*
- *EMAIL CONFIG*
- *CRM NOTIFY CONFIG*

4.1.2.1 URL CONFIG

This section provides details of Neox DC integration with third-party CRM solution. CRM integration enables agents to open a new browser window, with the configured CRM URL in the campaign page. When this new window is opened up, the SYSTEM parameters or LEAD Parameters from the uploaded Lead are passed as the parameter. Also, multiple window pop ups can be configured to allow the agent to open more than 1 URL.

To configure URL, do the following steps:

- *Creating URL Config*
- *Updating, Enabling, and Deleting URL Config*

4.1.2.1.1 Creating URL Config

To create URL Config:

1. Click **URL Popup** in URL Config on Campaign Listing.
2. Add URL Configuration screen appears.
3. The screen is bifurcated into two sections; Add URL Configuration and Modify URL Configuration.
 - Add URL Configuration - Provides a way to activate URL Popup. Before activation, make sure to first enable URL configuration from *System Management>>Server Management*.
 - Modify URL Configuration - Provides a list view of existing URL Config created in the system, including the details such as Event, URL, and so on. Additionally, you can create, update, and delete URL Configuration.

4. To add a new URL, click **Add New**.

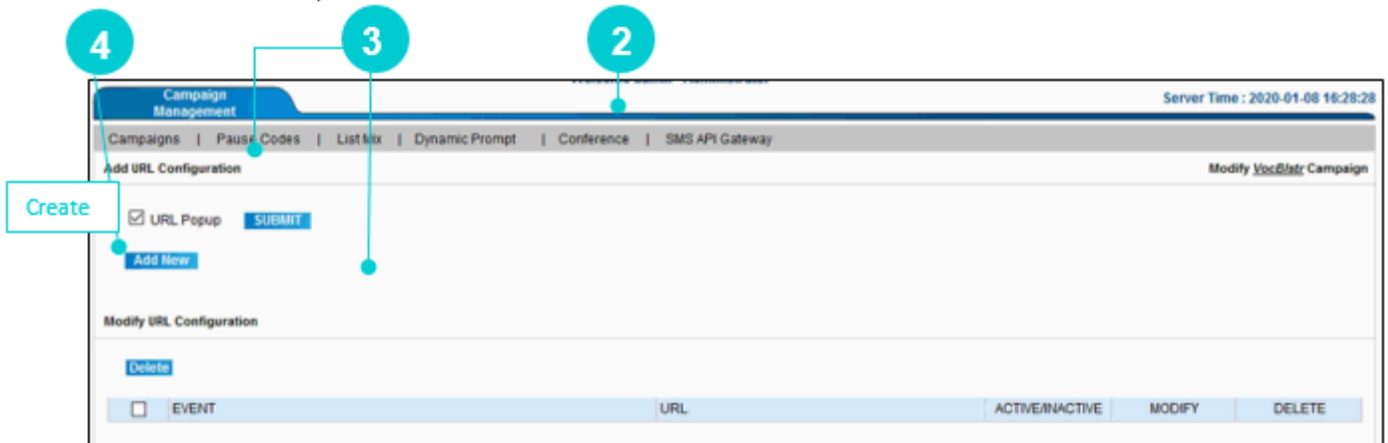


Figure 30 Add New URL Configuration

5. URL Configuration screen appears.

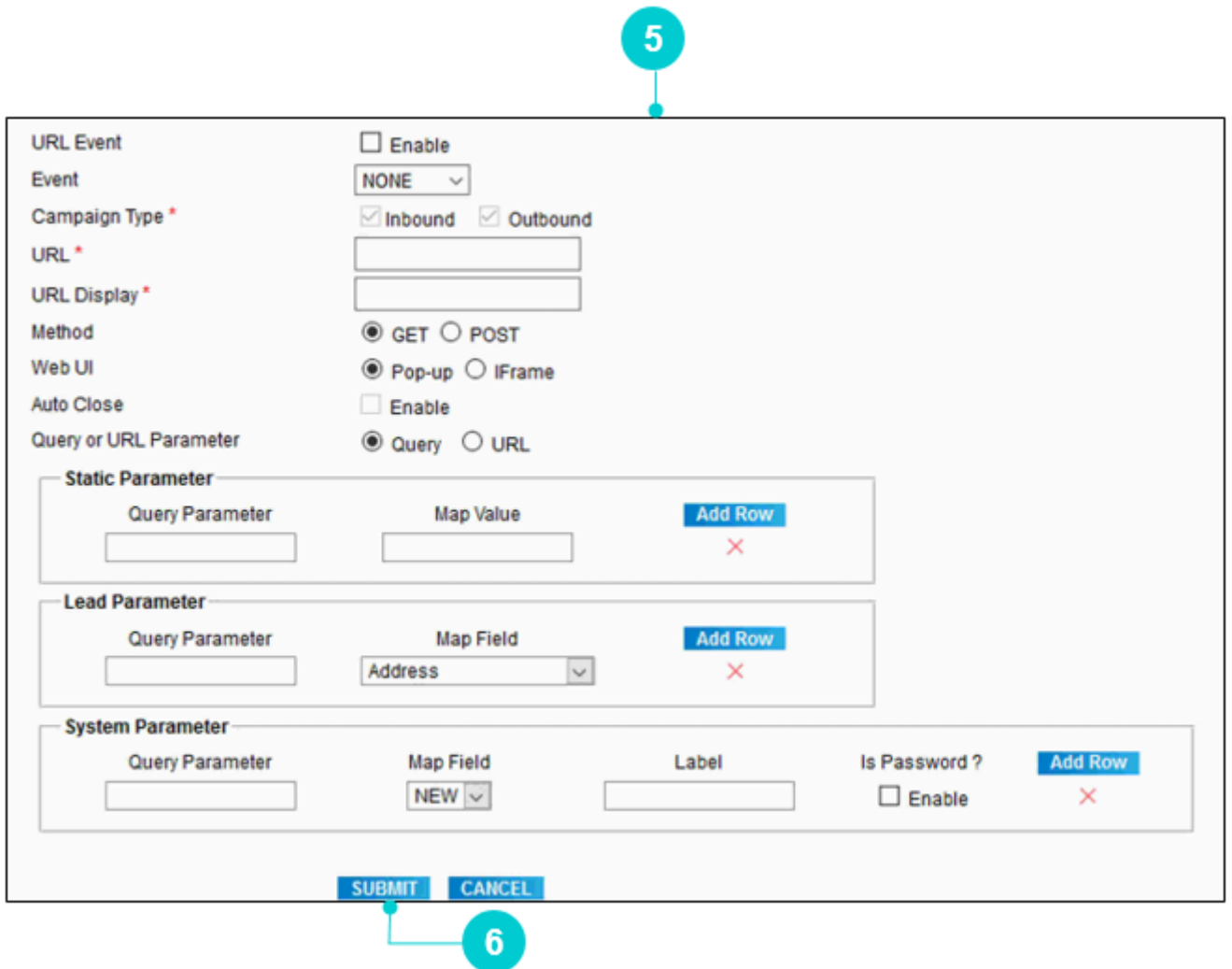


Figure 31 Add URL Configuration

Perform the configuration as given in the table below.

Table 7 URL Config Parameters

Parameters	Description
URL Event	Enable/Disable the particular event created.
Event	<p>Configure the event on which the URL will popup. The options are:</p> <ul style="list-style-type: none"> • NONE - URL popup label is displayed on the agent screen. When the agent clicks that link, then the configured URL opens and this configuration is not bind with any event at the agent. • LOGIN - When an agent logs in to the system, then the login page asks for the configured parameter for URL pop up. For example, an agent can login in Neox DC, as well as CRM via URL pop-up. • CALL - When incoming or outgoing call is allocated to the agent, then the configured URL popup opens. • DISPO - While disposing the call, configured URL opens. • LOGOUT - To ping any URL, select Logout. This pop up never remains open.
Campaign Type *	Specify to open configured URL pop up for inbound call or outbound call. This helps in a blended campaign. This option is configurable only for <i>Call</i> and <i>Dispo</i> type of Event.
URL *	Enter a URL that you want to open when a configured event occurs.
URL Display	Enter an alias name for the configured URL that is displayed on the agent's screen (Left side of the "ACTIVE CALLBACK LIST"). This will help the agent if the pop up window is closed. In this case, agent can click this configured name to open the URL pop up window manually.
Method	<p>Specify the method of taking the query. There are two type of methods:</p> <ul style="list-style-type: none"> • Get - In GET method, the data is sent as URL parameters that are usually strings of name and value pairs separated by ampersand (&). For example, http://www.example.com/action.php?name=john&age=24 • Post - In POST method, the data is sent to the server as a package in a separate communication with the processing script. Data sent through POST method is not visible in the URL. For example, http://www.example.com/action.php <p>Default method for any URL is Get. The URL popup opens with this method.</p>

Parameters	Description
Web UI	Select how you want to display URL, such as a pop-up and IFrame. An IFrame (Inline Frame) is an HTML document embedded inside another HTML document on a website.
Auto Close	Specify whether to close the already opened URL pop-up window at the end of event. Auto Close works for the CALL and DISPO Event. For example, <ul style="list-style-type: none"> The window which is opened during CALL event is automatically closed when the call gets disconnected. DISPO - URL pop-up window will close when the agent submits the disposition status.
Query or URL Parameter	Select a parameters as below: Specify the Parameter 1) Query 2) URL <ul style="list-style-type: none"> Query - In Query, the passed parameter is a key-map value. For example, http://www.google.co.in?key=value URL - In URL, the passed parameter is passed with slash (tick) at the end. For example, http://www.google.co.in/browse/NEOX-123

Query Parameter

Query or URL Parameter Query URL

Static Parameter

Query Parameter	Map Value	Add Row
<input type="text"/>	<input type="text"/>	×

Lead Parameter

Query Parameter	Map Field	Add Row
<input type="text"/>	Address <input type="text"/>	×

System Parameter

Query Parameter	Map Field	Label	Is Password ?	Add Row
<input type="text"/>	NEW <input type="text"/>	<input type="text"/>	<input type="checkbox"/> Enable	×

Figure 32 Query Parameter

URL Parameter

Query or URL Parameter Query URL

URL Parameter

Lead/System/Dynamic/Static	Map Field/Value	Label	Is Password ?	Add Row
LEAD <input type="text"/>	Address <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	×

Figure 33 URL Parameter

Parameters	Description
Static Parameter	
Query Parameter	Enter the token passed into the URL popup. (For example, first name=Adam, here first name is query parameter).
Map Value	Enter the map value to send the data for the query parameter to the URL pop up.
Lead Parameter	<p>Specify which lead parameter does the administrator wants to pass as a query parameter in the configured URL. Administrator can configure all lead fields from attached list to this campaign.</p> <ul style="list-style-type: none"> • Query Parameter - Token passed to the URL (For example, username=abc, where username is Query parameter). • Map Field - Token Map value that gets its value from the uploaded lead (For example, Phone Number, Phone Code, Country Code and so on). If the URL has the same Username and Password as the Dial Center Agent, then the same User Login and Password fields can be used. • Click Add Row to add the Query parameter and Map Field. • Click on X (cross) to delete that row.
System Parameter	<p>This field is required, if the administrator wants to configure different login credentials for the URL. Whatever configuration is performed here, will appear on the agent login screen.</p> <p>System Parameter gets the dynamic value at the Agent login time.</p> <ul style="list-style-type: none"> • Query Parameter - This parameter is the logical name of the field used in the URL that is to be opened. For example, os_username is the logical name of User Name textbox in the CRM Login page. • Map Field - NEW specifies adding the new parameter and other options are the ones if we want to reuse the previous configured Event Parameter. • Label - Displays name that appears on the Agent Login Screen. • Is Password - Enabling this intakes credentials from the agent in encrypted format. • Click Add Row to add the Query parameter and Map Field and Label. • Click X (cross) to delete that row.

6. Click **Submit**.

7. The green color indicates the configuration is done successfully.

4.1.2.1.2 Updating, Enabling, and Deleting URL Configuration

4.1.2.1.2.1 Updating URL Configuration

To update:

1. Click **Modify URL Configuration** corresponding to the URL Configuration on Modify URL Configuration.
2. Modify details as required.
3. Click **Submit**.

4.1.2.1.2.2 Enabling URL Configuration

To enable URL Popup:

1. Select URL Popup.
2. Click **Submit**.
3. This will enable the URL popup.

Note

URL setting must be enabled in the *System Management>>Server Management*.

4.1.2.1.2.3 Deleting URL Configurations

Neox provides two ways of deleting the URL Configurations:

- Single URL Configuration deletion – Enables deleting a single URL Configuration.
 1. Select a URL Configuration.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple URL Configurations deletion - Enables deleting multiple URL Configurations.
 1. To delete multiple URL Configurations, select the URL Configurations OR to delete all URL Configurations, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

4.1.2.2 SMS CONFIG

This section provides details of Neox DC integration with third-party SMS solution. SMS Config feature in Neox DC allows you to perform configuration where you can send SMS notification to the operator and customer. The recipients of the SMS notification can be customer number (from CDR, only one per CDR), external numbers (configuration at SMS page - multiple) or BOTH. BOTH option helps in sending SMS to both operator and customer.

To configure SMS, do the following steps:

- *Creating SMS Config*
- *Updating, Enabling, and Deleting SMS Config*

4.1.2.2.1 Creating SMS Config

To create SMS Config:

1. Click **SMS API** in SMS Config on Campaign Listing.
2. SMS Configuration screen appears.
3. The screen is bifurcated into two sections; SMS Configuration and Modify SMS Configuration.
 - SMS Configuration - Provides a way to activate SMS Configuration. Before activation, make sure to first enable SMS configuration from *System Management>>Server Management*.
 - Modify SMS Configuration - Provides a list view of existing SMS Config created in the system, including the details such as Status, Receiver Type, and so on. Additionally, you can create, update, and delete SMS Configuration.
4. To configure **SMS**, click **Create**.

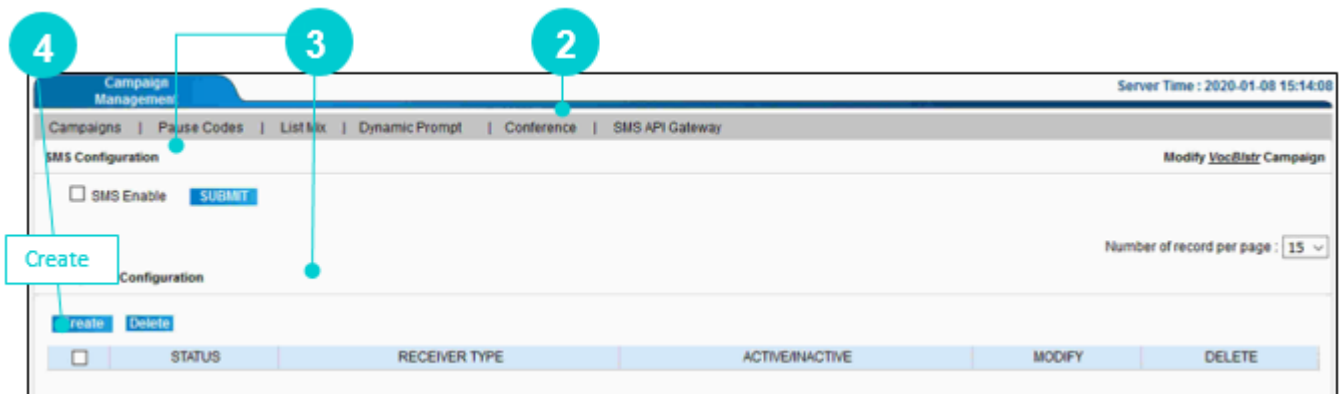


Figure 34 Create SMS Configuration

5. Add SMS Configuration screen appears.

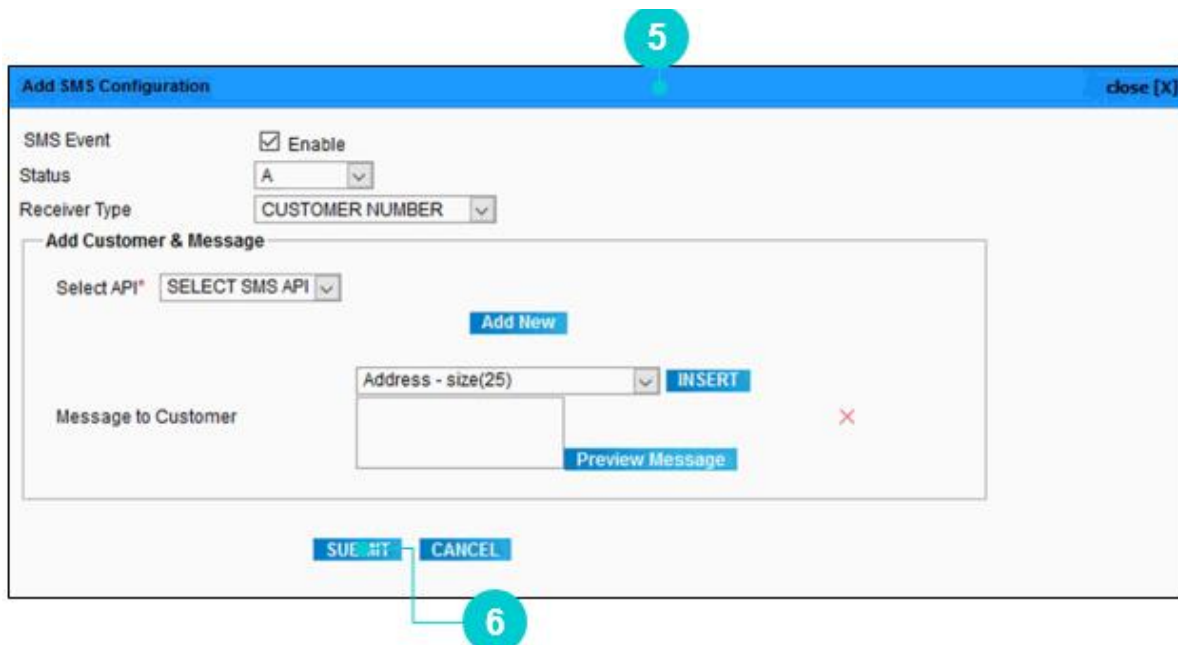


Figure 35 Add SMS Configuration

Perform the configuration as given in the table below.

Table 8 SMS Config Parameters

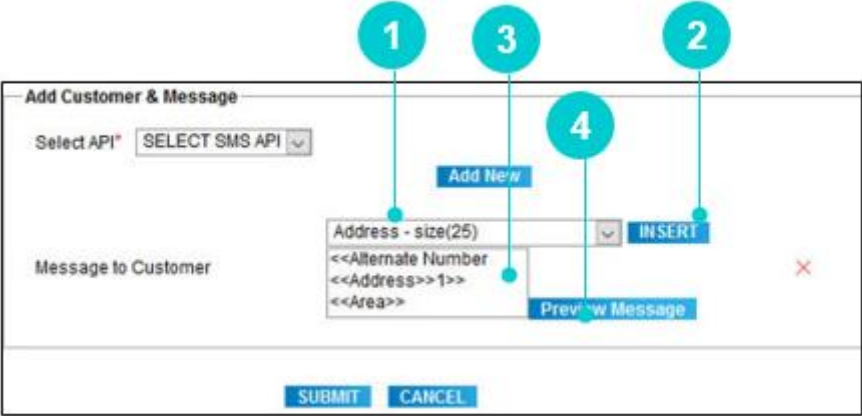
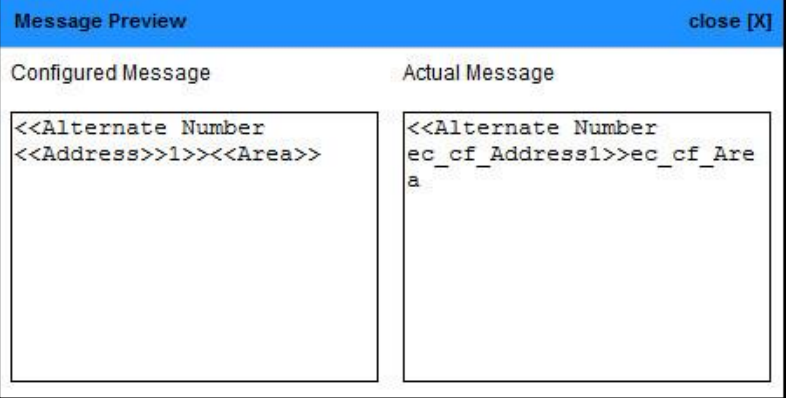
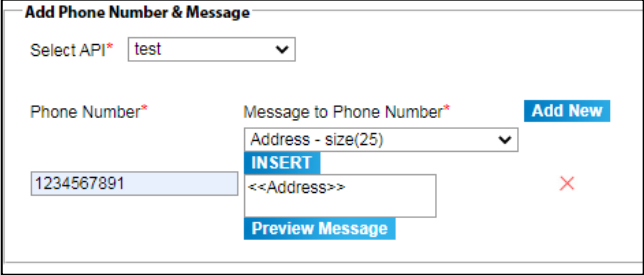
Parameters	Description
SMS Event	Enable/Disable the particular event created.
Status	Select Disposition status so that the agent can send sms to the number disconnected with the same status.
Receiver Type	<p>Select the message receiver type. There are three possible values.</p> <ul style="list-style-type: none"> • CUSTOMER NUMBER - Sends the message to the customer’s number available in the CDR. You can send SMS to any number of the customers. • ANOTHER PHONE NUMBER - Sends the message to the other numbers. You can send SMS to any number of phone numbers. • BOTH - Sends the message to the customers, as well as other numbers, as required.
Add Customer & Message - Available when Receiver Type is <i>Customer Number</i> or <i>Both</i> .	
Select API*	Select API through which SMS is sent.
Message to Customer	<p>This textbox contains the structure of the SMS sent to the customer.</p> <ol style="list-style-type: none"> 1. To create this, first select <i>Message Value</i>. 2. Click Insert. 3. All selected values are displayed in the given textbox. 4. You can preview the SMS structure by clicking Preview Message.  <p>Message Preview screen appears. You can view the Configured and Actual Message.</p>

Figure 36 Add Customer & Message

Parameters	Description
	 <p>The screenshot shows a 'Message Preview' dialog box with a 'close [X]' button. It is divided into two sections: 'Configured Message' and 'Actual Message'. The 'Configured Message' section contains the text: <<Alternate Number
<<Address>>1>><<Area>>. The 'Actual Message' section contains the rendered text: <<Alternate Number
ec_cf_Address1>>ec_cf_Are
a.</p> <p><i>Figure 37 Message Preview</i></p>
<p>Add Phone number & Message - Available when Receiver Type is another <i>Phone number</i> or <i>Both</i>.</p>	
<p>Select API*</p>	<p>Select API through which SMS is sent.</p>
<p>Phone Number</p>	<p>This textbox contains the structure of the SMS sent to the extension.</p> <ol style="list-style-type: none"> 1. To create this, first select Message to Phone Number. 2. Click Insert. 3. All selected values are displayed in the given textbox. 4. You can preview the SMS structure by clicking Preview Message.  <p>The screenshot shows the 'Add Phone Number & Message' dialog box. It includes a 'Select API*' dropdown menu with 'test' selected. Below it is a 'Phone Number*' field containing '1234567891'. To the right is a 'Message to Phone Number*' section with an 'Address - size(25)' dropdown menu and an 'INSERT' button. Below the dropdown is a text input field containing '<<Address>>'. There is also a 'Preview Message' button and a red 'X' icon. An 'Add New' button is located at the top right of the dialog.</p> <p><i>Figure 38 Add Customer & Message</i></p> <p>Message Preview screen appears. You can view the Configured and Actual Message.</p>

Parameters	Description
	<div style="border: 1px solid black; padding: 5px;"> <div style="background-color: #0070c0; color: white; padding: 2px; display: flex; justify-content: space-between;"> Message Preview close [X] </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="width: 45%;"> <p>Configured Message</p> <pre style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <<Alternate Number <<Address>>1>><<Area>> </pre> </div> <div style="width: 45%;"> <p>Actual Message</p> <pre style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <<Alternate Number ec_cf_Address1>>ec_cf_Are a </pre> </div> </div> </div> <p><i>Figure 39 Message Preview</i></p>

5. Click **Submit**.

4.1.2.2.2 Updating, Enabling, and Deleting SMS Configuration

4.1.2.2.2.1 Updating SMS Configuration

To update:

1. Click **Modify SMS Configuration** corresponding to the SMS Configuration on Modify SMS Configuration.
2. Modify details as required.
3. Click **Submit**.

4.1.2.2.2.2 Enabling SMS Configuration

To enable SMS configuration:

1. Select SMS Enable.
2. Click **Submit**.
3. This will enable the SMS Configuration.

 **Note**

SMS setting must be enabled in the *System Management>>Server Management*.

4.1.2.2.2.3 Deleting SMS Configurations

Neox provides two ways of deleting the SMS Configuration:

- Single SMS Configuration deletion – Enables deleting a single SMS Configuration.
 1. Select a SMS Configuration.
 2. Click **Delete**.
 3. Click **Ok** to confirm.

- Multiple SMS Configurations deletion - Enables deleting multiple SMS Configurations.
 1. To delete multiple SMS Configurations, select the SMS Configurations OR to delete all SMS Configurations, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

4.1.2.3 EMAIL CONFIG

This section provides details of Neox DC integration with third-party Email solution. Email Configuration feature in Neox DC allows you to perform configuration where you can send Email notification to the customers.

To configure Email, do the following steps:

- *Creating Email Configuration*
- *Updating, Enabling, and Deleting Email Configuration*

4.1.2.3.1 Creating Email Configuration

To create Email Configuration:

1. Click **Email API** in Email Config on Campaign Listing.
2. Add Email Configuration screen appears.
3. The screen is bifurcated into two sections; Add Email Configuration and Modify Email Configuration.
 - Add Email Configuration - Provides a way to activate Email Notification. Before activation, make sure to first enable Email configuration from *System Management>>Server Management*.
 - Modify Email Configuration - Provides a list view of existing Email Configuration created in the system, including the details such as Disposition Status, Sender Name and so on. Additionally, you can create, update, and delete Email Configuration.
4. To configure Email, click **Add New**.

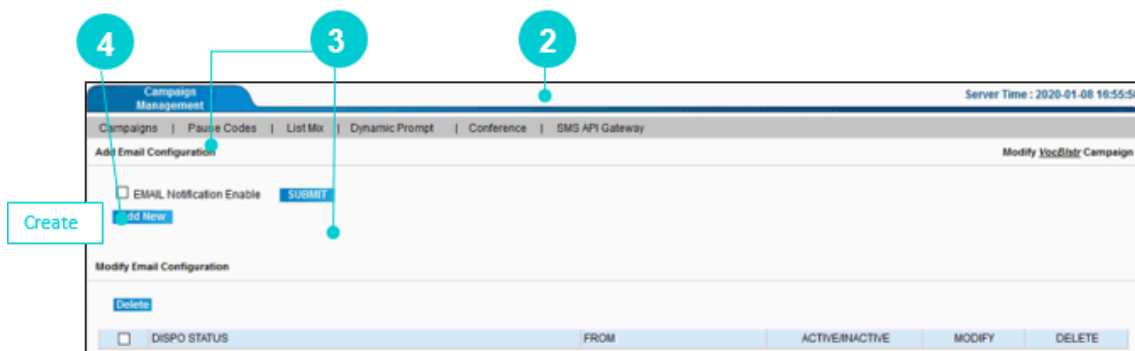


Figure 40 Create Email Configuration

5. Add Email Configuration screen appears.

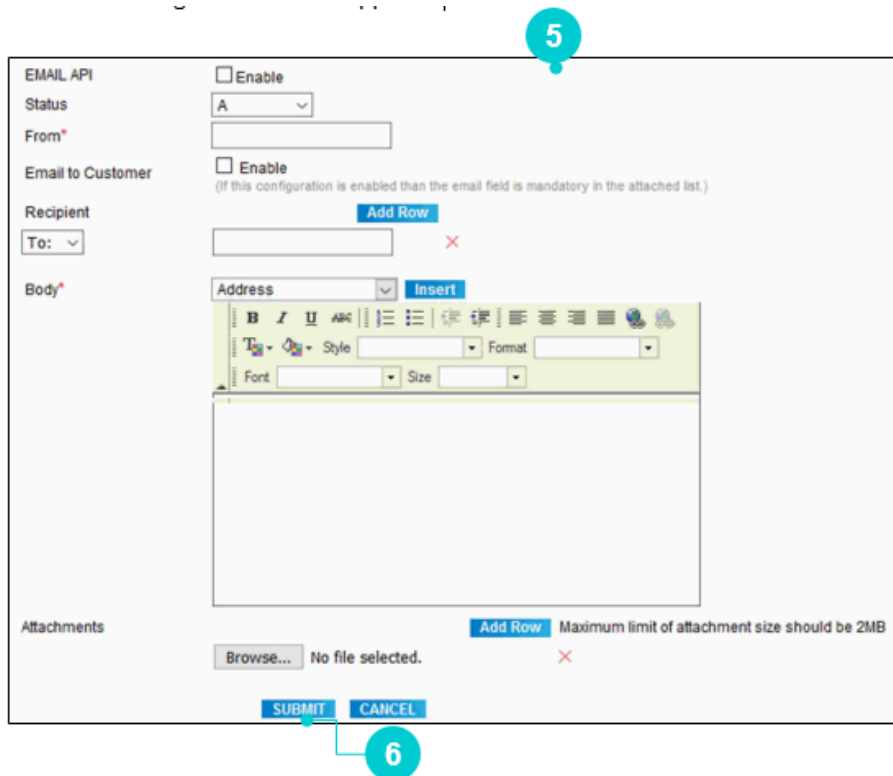


Figure 41 Add SMS Configuration

Perform the configuration as given in the table below.

Table 9 SMS Config Parameters

Parameters	Description
EMAIL API	Enable/Disable the particular EMAIL API.
Status	This field sets the disposition status on which the Email has to be sent. A list of all the disposition status allowed for the campaign appears here.
From	Enter the sender's email address.
Email to Customer	<p>If this field is enabled, then the uploaded list must contain an Email ID field. The email ID of the customer is extracted from the list and the email is sent to that ID.</p> <p>If a new lead is dialed, the agent can enter the email ID of the customer in the CRM form. This ID is passed to Neox and an Email is sent to that ID.</p>
Recipient	Add recipients email address in the given field. You may enter the recipient email in the "To" field, send a copy of the email through "CC" and "BCC" option.
Subject*	Define the subject line of the email by selecting the values from the given drop-down options (lead parameter and call log parameter). After selecting the option, click Insert .
Body	Enter the content of the email body in this section by selecting the values from the drop-down options (lead parameter and call log parameter). After selecting the option, click Insert .
Attachments	Upload any supporting attachments by clicking Browse. You may upload multiple attachments.

6. Click **Submit**.

4.1.2.3.2 Updating, Enabling, and Deleting Email Configuration

4.1.2.3.2.1 Updating Email Configuration

To update:

1. Click **Modify** corresponding to the Email Configuration on Modify Email Configuration.
2. Modify details as required.
3. Click **Submit**.

4.1.2.3.2.2 Enabling Email Configuration

To enable Email configuration:

1. Select Email Notification Enable.
2. Click **Submit**.
3. This will enable the Email Notification Configuration.

 **Note**

Email setting must be enabled in the *System Management>>Server Management*.

4.1.2.3.2.3 Deleting Email Configurations

Neox provides two ways of deleting the Email Configurations:

- Single Email Configuration deletion – Enables deleting a single Email Configuration.
 1. Select an Email Configuration.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Email Configurations deletion - Enables deleting multiple Email Configurations.
 1. To delete multiple Email Configurations, select the Email Configurations OR to delete all Email Configurations, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

4.1.2.4 CRM NOTIFY CONFIG

This section helps in understanding the integration of Customer Relationship Management (CRM) with Neox based on configured configuration when any call gets Disconnected or Disposed with particular status or when any incoming call arrived in the system. CRM configuration can be done in Campaign, In-group and DID number.

To configure CRM Notification, do the following steps:

- *Creating CRM Notify Configuration*
- *Updating, Enabling, and Deleting CRM Notify Configuration*

4.1.2.4.1 Creating CRM Notify Configuration

To create CRM, Notify Configuration:

1. Click CRM API in CRM Notify Config on Campaign Listing.
2. Add CRM Notify Configuration screen appears.
3. The screen is bifurcated into two sections; Add CRM Notify Configuration and Modify CRM Notify Configuration.
 - Add CRM Notify Configuration - Provides a way to activate CRM Notify Configuration. Before activation, make sure to first enable CRM configuration from *System Management>>Server Management*.
 - Modify CRM Notify Configuration - Provides a list view of existing CRM Notify Configuration created in the system, including the details such as Event, URL, Method, and so on. Additionally, you can create, update, and delete CRM Notify Configuration.
4. To configure CRM Notify, click **Add New**.

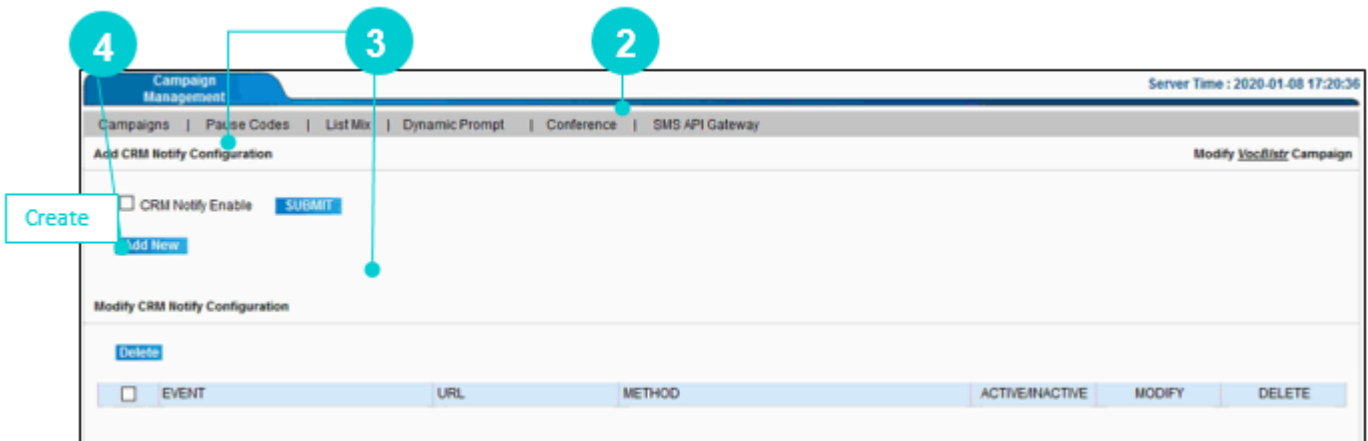


Figure 42 Create SMS Configuration

5. Add CRM Notify Configuration screen appears.

The screenshot shows the 'Add CRM Notify Configuration' screen. At the top, a red circle with the number '5' points to the 'Enable' checkbox. The form contains the following fields and options:

- CRM Notify Event:** Enable
- Enable Retry On Failure:** Yes No
- Event:** CALL_INITIATED (dropdown)
- Call Type:** Inbound Outbound
- Method:** JSON URL
- Authentication:** Secret Key Access Token Auth Token API None
- CRM Notification URL:** [Text input field]
- CRM Notification URL Header:** [Text input field]
- Static Key/Value For Lead Parameter:** [Text input field]
- Lead Parameter:** A table with columns 'Query Parameter' and 'Map Field'. One row is visible with 'Address' in the 'Map Field' column. An 'Add Row' button with a red 'X' is next to it.

At the bottom, a red circle with the number '6' points to the 'SUBMIT' button. A 'CANCEL' button is also present.


Figure 43 Add CRM Notify Configuration

6. Perform the configuration as given in the table below.

7. After performing the configurations, click **Submit**.

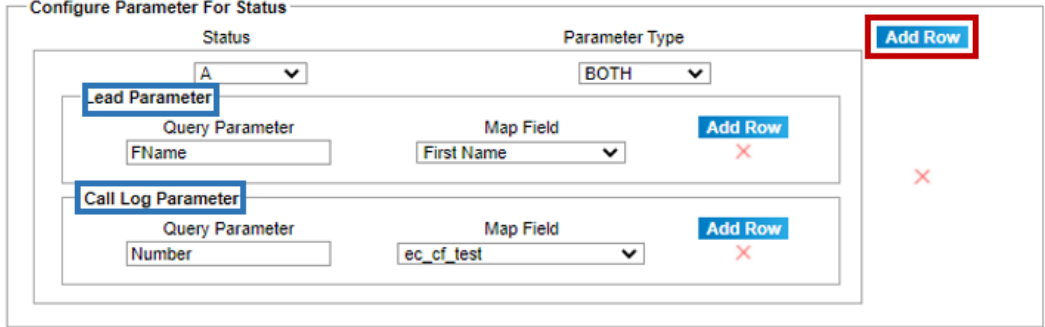
Table 10 CRM Notify Config Parameters

Parameters	Description
CRM Notify Event	Enable/Disable the particular event created.
Event	Select the event type when you want to send the data to the CRM. The options are: <ul style="list-style-type: none"> • CALL_INITIATED • CALL_CONNECTED • CALL_HANGUP • CALL_HISTORY • CDR_UPDATE

Parameters	Description
	<p> Note</p> <ul style="list-style-type: none"> The CDR_UPDATE applies only to Campaigns. This event is functional only when an administrator updates the <i>Call CDR Report</i> (Report Management → Call CDR Report). For example, updates values in <i>Agent Rank, Custom Fields</i>, etc.
Call Type *	Select the type of call “Inbound” or “Outbound” to send the data to the CRM.
Method *	Select the type of method “JSON” or “URL” supported by the CRM to send the data.
Authentication	<p>Select the type of authentication to send the data to the CRM. For this, enter the Secret Key/Access Token/Auth Token API provided by the CRM to allow sending data.</p> <ul style="list-style-type: none"> Secret Key <ul style="list-style-type: none"> Send Secret Key in URL or Header. Access Token <ul style="list-style-type: none"> Enter Access Token URL, Access Token Parameter, and Access Token Header to send data to the CRM. Auth Token API <ul style="list-style-type: none"> Select Auth Token API, Token as Header or Request Body and enter the Token Key.
Send Recording File	<p>For the Call_HISTORY event, you can add configuration for sending the recording file name or recording file name along with the actual file to CRM notification. To do so, follow the below steps:</p> <ol style="list-style-type: none"> Select “No” option to not send any recording file or file name. Select "REC_FILE_NAME" option for sending only recording file name. We need to provide a key in "Recording File Name Key" parameter. <div data-bbox="536 1621 1533 1733" style="border: 1px solid black; padding: 5px;"> <p>Send Recording File <input type="radio"/> NO <input checked="" type="radio"/> REC_FILE_NAME <input type="radio"/> REC_FILE</p> <p>Recording File Name Key * <input type="text" value="file_name"/></p> </div> <p>For example, Recording File Name Key: file_name Neox will send Notification as "file_name" : "<Actual Recording File Name>.wav"</p>

Parameters	Description
	<p>10. Select the "REC_FILE" option to send the recording file name with actual file. We need to provide key in "Recording File Name Key" parameter and "Recording File Data Key" parameter.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Send Recording File <input type="radio"/> NO <input type="radio"/> REC_FILE_NAME <input checked="" type="radio"/> REC_FILE</p> <p>Recording File Name Key * <input style="width: 150px;" type="text" value="file_name"/></p> <p>Recording File Data Key * <input style="width: 150px;" type="text" value="file_data"/></p> </div> <p>For example, Recording File Name Key: file_name and Recording File Data Key: file_data</p> <p>Neox will send Notification as "file_name" : "<Actual Recording File Name>.wav" and "file_data" : "<Actual Recording File Data>"</p>
CRM Notification URL Header	Enter the URL header through which you need to send data to CRM. For example, Content-Type: application/x-www-form-urlencoded
Static Key/Value For Lead Parameter	Enter any static key or value for lead parameter while sending the data.
Lead Parameter	This is applicable for CALL_INITATED, CALL_CONNECTED, and CALL_HANGUP type of event. Lead Parameter allows you to map the system and CRM (third-party) fields.
Query Parameter	Enter the third-party defined parameter (query parameter) to map with the Neox DC defined parameters.
Map Fields	<p>Select the Neox DC defined parameters (map fields) to map with the third-party defined parameters.</p> <p>For example, phone number is indicated as "pnumber" by third-party and "phonenummer" by Neox DC, then enter following:</p> <ul style="list-style-type: none"> • Query Parameter = pnumber • Map Field = phonenummer
Configure Parameter For Status	This is applicable for CALL_HISTORY event. This parameter allows the CRM to get the details based on Disposition Status. System checks the data in Leads, Call Logs (CDR) or both, based on the configuration.
Status	Select a disposition status to retrieve data of a specific Disposition Status.
Parameter Type	<p>Select the parameter type from where you want to retrieve the data of the Disposition Status. The options are:</p> <ul style="list-style-type: none"> • Lead Data – Retrieves data from leads.

Parameters	Description
	<ul style="list-style-type: none"> • Call Logs (CDR) – Retrieves the data from CDR. • Both – Retrieves the data from both leads and CDR. <p>You may configure more parameters to retrieve the data from other disposition statuses.</p>
Lead Parameter	<p>Here, you map CRM defined fields (Query Parameter) with the Neox DC defined fields (Map Field).</p> <p>For example, CRM wants first name and phone number details of the leads having Disposition Status “B” and only phone number details of the leads having Disposition Status “784” from Lead Data.</p> <p>In this case, perform the configuration as shown in the following figure.</p> <p>Click Add Row to configure more parameters.</p> <div data-bbox="437 927 1299 1391" data-label="Image"> </div> <p><i>Figure 44 Configure Parameters for Status</i></p>
Call Log Parameter	<p>Using this option, you can map CRM defined fields (Query Parameter) with the custom fields. The custom fields are created in the List Management → List Customer Fields → Use in CDR-Y.</p> <div data-bbox="437 1608 1501 1861" data-label="Image"> </div> <p>Click Add Row to configure more parameters.</p>
Both Parameters	<p>Selecting the Both parameter type displays both Lead Parameter and Call Log Parameter.</p>

Parameters	Description
	 <p>Clicking Add Row adds the Lead Parameter by default.</p>

4.1.2.4.2 Updating, Enabling, and Deleting CRM Notify Configuration

4.1.2.4.2.1 Updating CRM Notify Configuration

To update:

1. Click **Modify** corresponding to the CRM Notify Configuration on Modify CRM Notify Configuration.
2. Modify details as required.
3. Click **Submit**.

4.1.2.4.2.2 Enabling CRM Notify Configuration

To enable CRM, Notify configuration:

1. Select CRM Notify Enable.
2. Click **Submit**.
3. This will enable the CRM Notify Configuration.

 **Note**

CRM Notify setting must be enabled in the *System Management>>Server Management*.

4.1.2.4.2.3 Deleting CRM Notify Configurations

Neox provides two ways of deleting the CRM Notify Configuration:

- Single CRM Notify Configuration deletion – Enables deleting a single CRM Notify Configuration.
 1. Select a CRM Notify Configuration.
 2. Click **Delete**.
 3. Click **Ok** to confirm.

- Multiple CRM Notify Configurations deletion - Enables deleting multiple CRM Notify Configurations.
 1. To delete multiple CRM Notify Configurations, select the CRM Notify Configurations OR to delete all CRM Notify Configurations, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

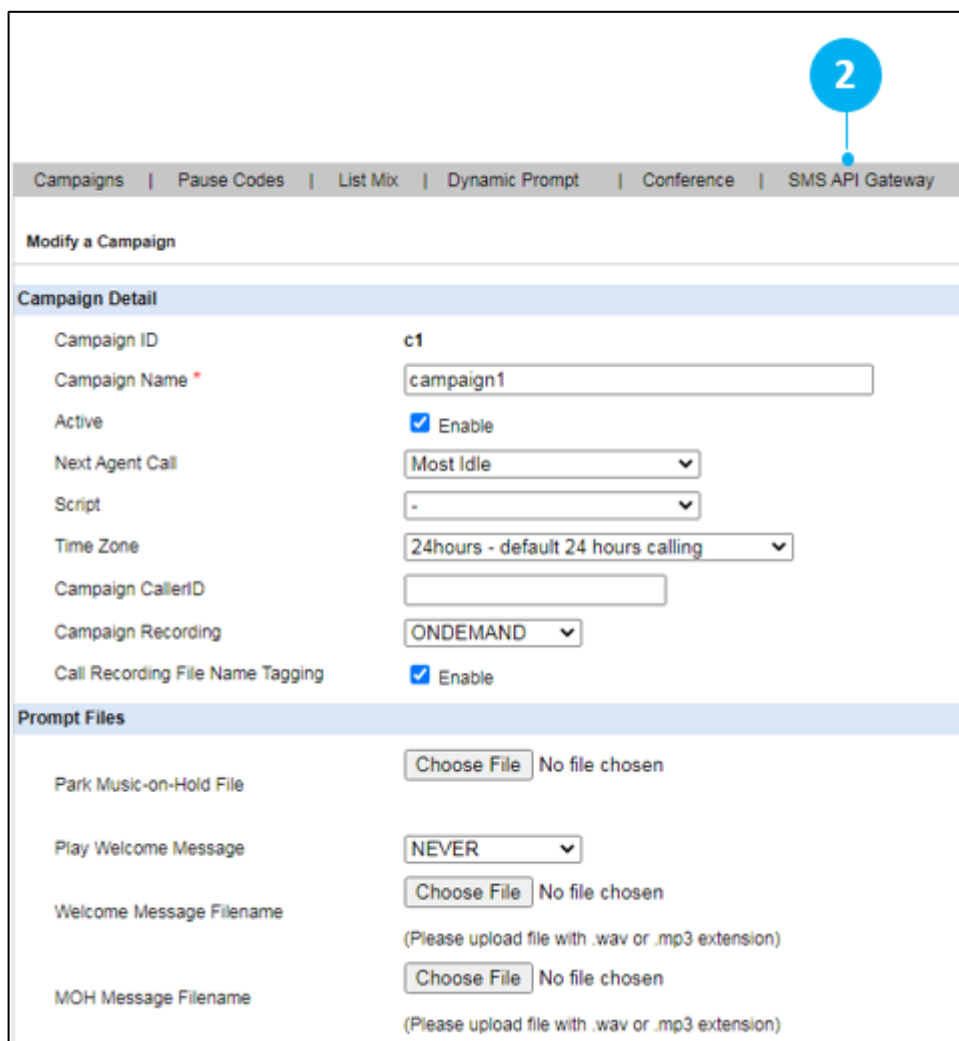
4.1.3 Updating, Searching, and Deleting Campaigns

In addition to performing Campaigns creation, you may also update, search, and delete (single and bulk) Campaigns.

4.1.3.1 Updating Campaigns

When you UPDATE a campaign, additional configurations related to the campaign appear. To update:

1. Click **Edit** corresponding to the Campaign.
2. Modify a Campaign screen appears.
3. Modify the Campaign details as given in the table.



The screenshot shows the 'Modify a Campaign' interface. At the top, there is a navigation bar with tabs: Campaigns, Pause Codes, List Mix, Dynamic Prompt, Conference, and SMS API Gateway. A blue circle with the number '2' is placed above the 'SMS API Gateway' tab. Below the navigation bar, the title 'Modify a Campaign' is displayed. The form is organized into two main sections: 'Campaign Detail' and 'Prompt Files'.

Campaign Detail

Campaign ID	c1
Campaign Name *	campaign1
Active	<input checked="" type="checkbox"/> Enable
Next Agent Call	Most Idle
Script	-
Time Zone	24hours - default 24 hours calling
Campaign CallerID	
Campaign Recording	ONDEMAND
Call Recording File Name Tagging	<input checked="" type="checkbox"/> Enable

Prompt Files

Park Music-on-Hold File	Choose File No file chosen
Play Welcome Message	NEVER
Welcome Message Filename	Choose File No file chosen (Please upload file with .wav or .mp3 extension)
MOH Message Filename	Choose File No file chosen (Please upload file with .wav or .mp3 extension)

Figure 45 Modify Campaign

Table 11 Modify Campaign Parameters

Parameters	Description
Campaign Caller ID	Displays the number to the customer. If no number is available, then the pilot number is displayed.
Campaign Recording	Allows recording calls. The options are: <ul style="list-style-type: none"> • NONE- Not allowing call recording. • ONDEMAND-Allows only when call recording is required. • ALLCALLS – Allows recording all calls, however agent can disable recording. • ALLFORCE - It applies recording to all calls.
Call Recording File Name Tagging	Enable the Call Recording File Name Tagging option to rename the recording file with a given tag. The tag is used as a prefix for recording file name. Currently, this feature only works with API, where the Disposition API will supply the recording tag. If you have not get a recording tag from Disposition API, then the recording file name stays as it is.
Configuration for Transfer	
Allow Transfer To External Number	Select <i>Enable</i> to transfer calls to the external number.
Predefine Call Transfer Profile	Select a profile where you want to transfer the call. This profile is created from <i>Service & Feature>>Number Profile</i> .
Dial Status	System auto dials the leads/data based on the status selected in this section.
Campaign Statuses	Select Campaign Statuses. So, when an agent selects disposition status at the end of the call, then more options are displayed for better understanding. System also displays default statuses for selection.
Lead Filter Option	
Enable lead filter	Allows filtering the lead uploaded in the campaign. For example, If the lead has a column state, in which different states are specified, then the lead can be filtered by specifying the state name, (For example, Gujarat).
Hopper and List Configuration	
Minimum Hopper Level	Select the number of leads that are ready to be called during predictive dialing.

Parameters	Description
List Mix	<p>Select an active List Mix to bind the list mix to the campaign. For list mix to work, make sure that the hopper level of campaign is 100, as the list mix algorithm (EVENT MIX, ORDERED MIX and RANDOM MIX) is designed accordingly.</p> <p>When the agent clicks Dial Next, then the system dials the next lead from this list according to the selected algorithm defined while creating List Mix.</p>
Outbound Lead Priority	<p>Enables call from the agent to land to the customer based on the priority given to the customer. In outbound call, the priority can be set in three ways:</p> <ul style="list-style-type: none"> • FIFO (First in First Out) - The lead first entered in the list is dialed first and the lead entered the last is dialed at the last. • Highest to Lowest - Lead with highest priority is dialed first and lead with the least priority is dialed at the last. For example, 100 being the highest and 1 being the Lowest. • Lowest to Highest - Lead with lowest priority is dialed first and lead with the highest priority is dialed at the last. For example, 100 being the highest and 1 being the Lowest).
Alt Number Dialing	Allows the agent to dial alternate number if the customer does not pick the call on the primary number.
Agent GUI Configuration	
Agent Lead Search	Allows the agent to search the leads from the system.
Agent Pause Codes Active	<p>If Enabled, then agent Allows the agent to select Pause Code. The Pause Code is configured from <i>Campaign Management</i>>><i>Pause Code</i>.</p> <p>The options are:</p> <ul style="list-style-type: none"> • Y – Enable select Pause Code. • N – Disable Pause Code. • FORCE – Agent must select the Pause Code while he do pause on GUI.
Agent Login without Leads	If Enabled, then allow the agent to log in without leads.
Manual Dial Method	
Manual Dial Override	Allows the agent to dial a number manually. However, number should be registered in the system irrespective it is uploaded in the system or not.

Parameters	Description
Manual Dial Filter	<p>Allows the agent to dial a number manually. The options are:</p> <ul style="list-style-type: none"> • DNC_ONLY - Allows filtering the leads from DO NOT CALL List only. • CAMPLISTS_ONLY - Allows filtering the leads from CAMPAIGN LIST only. • DNC_AND_CAMPLISTS: Allows filtering the leads from DNC and Campaign. • NONE – This will not allow filtering the leads.
Manual Call Time Check	If this field is enabled, then whenever the agent dials manually, the call time is checked of lead, as specified in the time zone.
Other Configuration	
Dial Timeout	Enter the time after which the call is disconnected if the call is not answered.
Dial Prefix	Enter the prefix that is attached to the dialed number. By default, prefix is attached to the dialed number. If a prefix is already given, then no prefix is added to the number. For example, for number such as 91NXXNXXXXXX, the prefix will be “9”, whereas for no dial prefix, use X.
Omit Phone Code	<p>This field allows you to leave out the phone_code field while dialing within the Neox dialer.</p> <p>For instance, If you are in India and dialing a phone number in India, then you need to dial only the given phone number without a prefix, such as 91.</p>
Drop Call Seconds	It is the number of seconds after which the call is dropped if the call is not answered by the agent. To comply with the regulations, it is recommended that you set this to 5 seconds at most.
Wrap Up Seconds	The number of seconds to force/allow an agent to fill the form before allowing them to receive or dial another call. The timer begins as soon as an agent hangs up on their customer - or in the case of alternate number dialing, when the agent finishes the lead. Once the timer is ended then the call is automatically disposed irrespective of agent action.
Use DNC	The lead whose call status is DNC (Do Not Call) is not dialed, if the value is set to Y, and if the value is set to N, then the lead is dialed.
URL Configuration	
URL Popup	If this Field is enabled, then URL configuration is active, and if it is Disabled, then URL is inactive.
SMS Configuration	

Parameters	Description
SMS API	If this Field is enabled, then SMS configuration is active and if not, then it's inactive. This is configured from <i>System Management>>Server Management >> Enable SMS Preprocessing</i>
Email Configuration	
Email API	If this field is enabled, then email configuration is active. If it is disabled, then it is inactive.
CRM Notify Configuration	
CRM Notify API	
Lists Within This Campaign	Displays a list of leads attached in the specific campaign. When the agent logs in into the portal, then this list appears.

4. Click **Submit** to save the details.

4.1.3.2 Searching Campaigns

To search using filter:

1. Enter Campaign ID, Name or select Dial Method.
2. Click **Search**.
3. System returns all Campaigns details that contain the search term.
4. To get a list of all Campaigns details, click **Search**.

4.1.3.3 Deleting Campaigns

Neox provides two ways of deleting the Campaigns:

- Single Campaign deletion – Enables deleting a single Campaign configuration.
 1. Select a Campaign.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Campaigns deletion - Enables deleting multiple Campaigns.
 1. To delete multiple Campaigns, select the Campaigns OR to delete all Campaigns, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

4.2 Pause Codes

This section provides details about Pause Codes that are used by the agents, when they want to pause due to any reason, such as meeting, tea break, training, dinner and so on. Administrator can create Pause Codes for any reason and associate with the campaign. An agent associated with that campaign can select the Pause Code when they want to take a break. The Pause Codes are displayed on the agent's portal. This data is then stored in the Neox Dial Center agent log.

Pause Codes helps the administrator in tracking the pause time and reason for pause through Pause Codes. Pause Codes can be defined for any campaign and customized according to the needs. To use this pause code, the administrator has to first activate the Pause Codes. All agents associated with the campaign are able to use the Pause Codes. You can see statistics on Agent pause code time in the Agent Performance Detail report.

If the Agent Pause Codes Active field is set to active, then the agents are able to select from these pause codes when they click on the PAUSE button on their screens. This data is then stored in the Neox Dial Center agent log. The Pause code must contain only letters and numbers and be less than 7 characters long. The pause code name can be no longer than 30 characters. You can see statistics on Agent pause code time in the Agent Performance Detail report.

To manage Pause Codes, do the following steps:

- *Creating Pause Codes*
- *Updating, Searching, and Deleting Pause Codes*

4.2.1 Creating Pause Codes

To create a Pause Code:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Campaign Management**, and then click **Pause Codes**.



Figure 46 Pause Codes menu

3. Pause Code screen appears.
4. The screen is bifurcated into two sections; Search for Campaign Agent Pause Code and Campaign Agent Pause Code Listing.
 - Search for Campaign Agent Pause Code - Provides a way to search Pause Code details using search criteria.
 - Campaign Agent Pause Code Listing - Provides a list view of existing Pause Codes created in the system, including the details such as Campaign ID, Campaign Name, and Pause Codes. Additionally, you can update, search, and delete Pause Code and view details of a Pause Code by clicking its Campaign ID.
5. To modify a new Pause Code, click **Modify Pause Codes**.

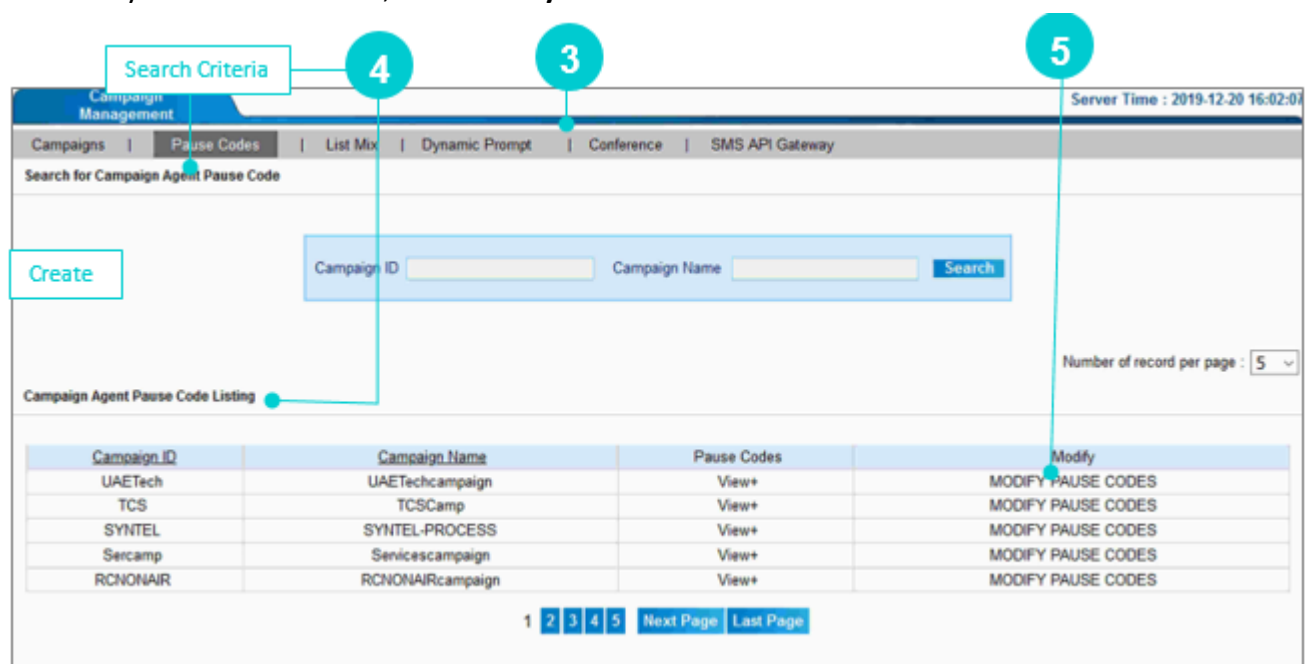


Figure 47 Modify Pause Code

- Pause Code screen appears in edit mode. This displays a list of existing Pause Codes, if available.
- To create a new Pause Code, Enter Pause Code and Pause Code name in the given fields. "Pause Code" is not editable once it is created.
- Click **Add**.

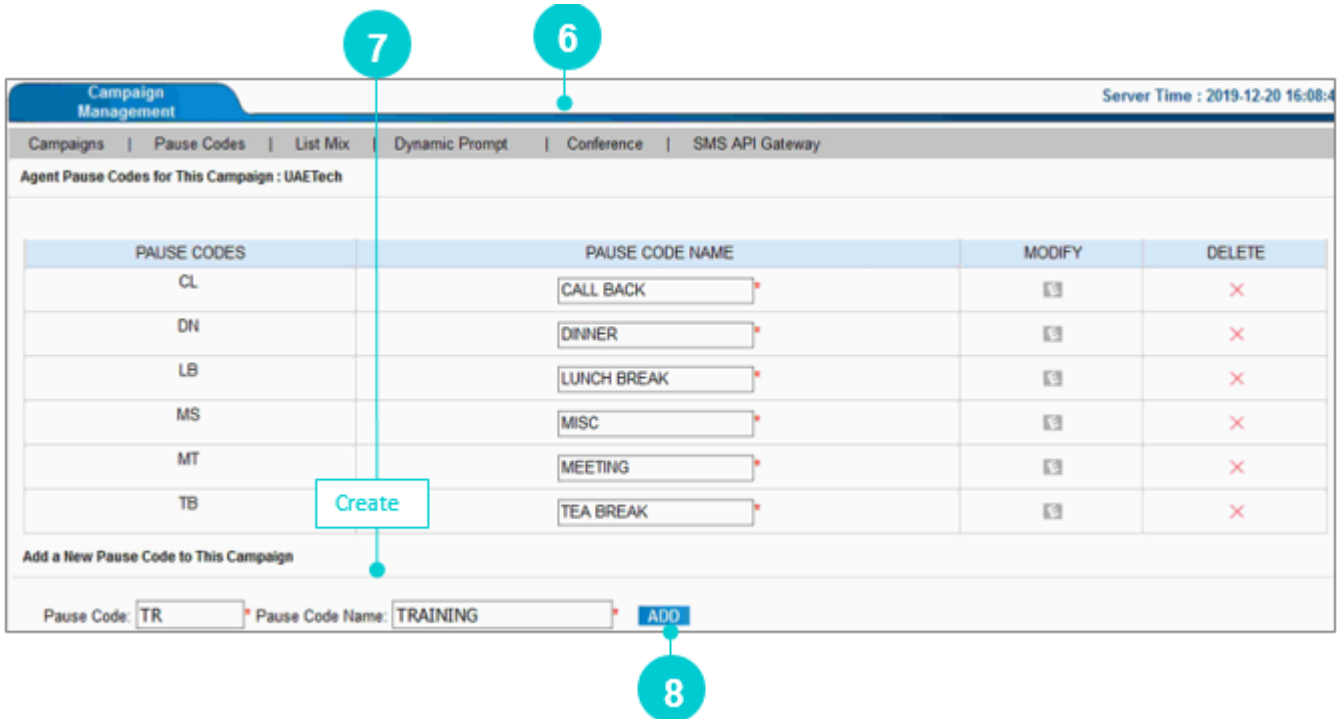


Figure 48 Create Pause Code

- A confirmation message appears. Click **Ok**.

4.2.2 Updating, Searching, and Deleting Pause Codes

4.2.2.1 Updating Pause Code

To update:

1. Click **Modify Pause Code** corresponding to the Campaign ID on Campaign Agent Pause Code Listing.
2. Enter a new Pause Code Name. "Pause Code" not editable once it is created.
3. Click **Edit**.



PAUSE CODES	PAUSE CODE NAME	MODIFY	DELETE
CL	CALL BACK		

Figure 49 Edit Pause Code

4.2.2.2 Searching Pause Codes

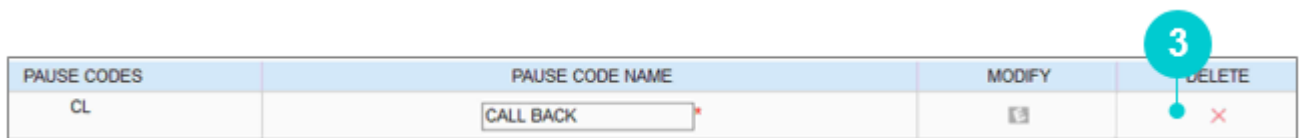
To search using filter:

1. Enter Campaign ID/Campaign Name.
2. Click **Search**.
3. System returns all Pause Codes details that contain the search term.
4. To get a list of all Pause Codes details, click **Search**.

4.2.2.3 Deleting Pause Codes

To delete:

1. Click **Modify Pause Code** corresponding to the Campaign ID on Campaign Agent Pause Code Listing.
2. Click **Delete**.





PAUSE CODES	PAUSE CODE NAME	MODIFY	DELETE
CL	CALL BACK		

Figure 50 Edit Pause Code

4.3 List Mix

This section provides information about List Mix to allow dialing the customer's contact number from the list based on the priority and configuration. A List contains details of customer's contact numbers and attached with a campaign. In List Mix, you can create algorithm by selecting the method and priority of the list, to define which lead is next called by the agent. List Mix offers flexibility in calling leads to provide better customer experience.

List Mix is used for:

- Calling leads from multiple lists based on the applied algorithm, such as Even Mix, In Order, and Random.
- Create Reports of a specific list to determine the sales made, leads quality and so on.
- Enable or Disable calling in specific lists.

Steps to configure List Mix:

1. Create a Campaign, let's say, Group_A.
2. Create multiple Lists, let's say List A, List B, and List C, that contains the customer's details in .csv format and bind with the Campaign, Group A. To know how to create a List, refer to *List Management>>Load a New Load*. Make sure all lists contain the same number of fields with the same name and type.
3. Check all lists (List A, List B, and List 3) are bind with the campaign, Group_A. To know how to check, refer to *Campaign Management>>Campaign*.
4. When you bind Lists with Campaign, then a List Mix is created with the Campaign name, let's say, Group_A is created with all three Lists (List A, List B, and List 3). To access, refer to *Campaign Management>>List Mix*.
5. Apply algorithm on the List Mix and activate the List Mix.
6. As you activate the List Mix, it is available for the campaign. Modify campaign, Group_A and enable the List Mix, let's say Group_A-list_mix.
7. List Mix is activated.

To configure List Mix, do the following:

- *Modifying a List Mix*

4.3.1 Modifying a List Mix

To modify List Mix:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Campaign Management**, and then click **List Mix**.



Figure 51 List Mix menu

3. Campaign List Mix Listings screen appears.
4. The screen has a section; Campaign List Mix Listings.
 - Campaign List Mix Listings – Provides a list view of all list mixes created by binding lists with the campaign. You can view details such as Campaign name, Name, Number of Lists, List Mix, and Activate/Deactivate the List Mix. You have to modify List Mix to apply the algorithm.
5. To modify a new List Mix, click **Modify List Mix**.

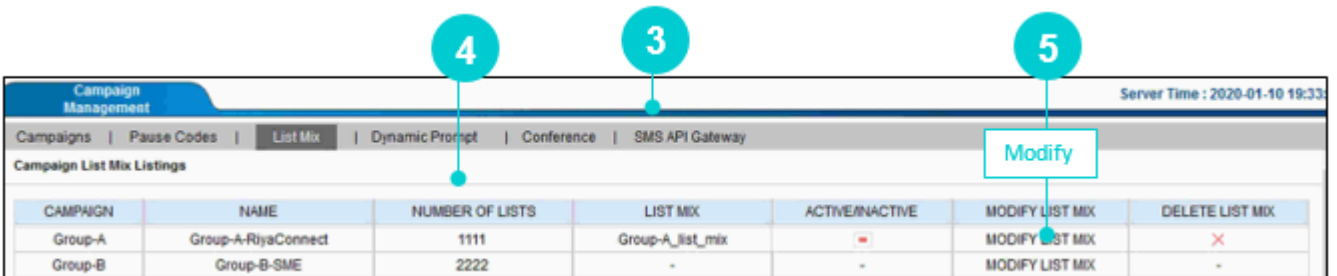


Figure 52 Modify List Mix

6. List Mix for This Campaign screen appears. Enter the parameters as given in the table.

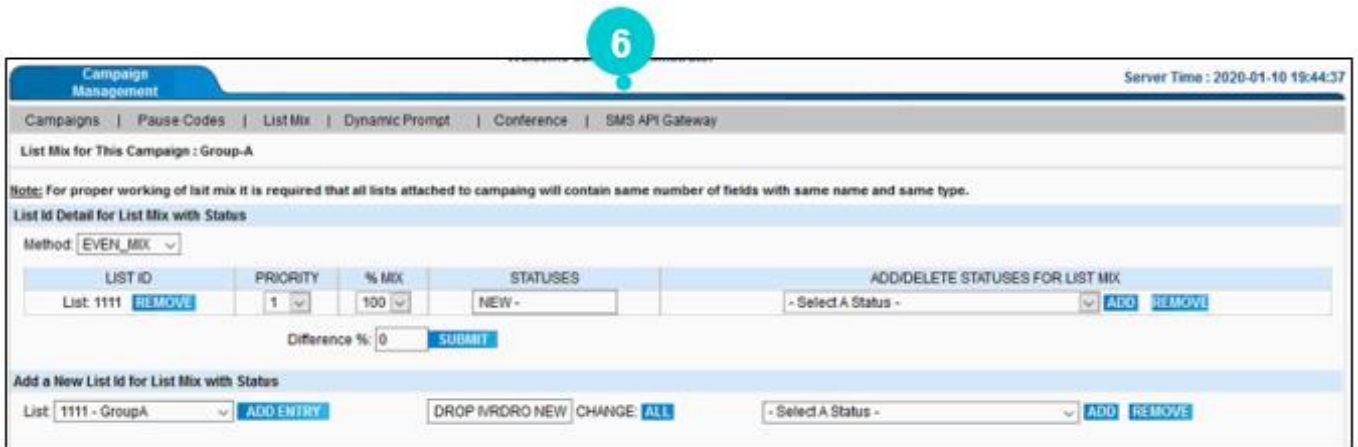


Figure 53 List Mix for the Campaign

Table 12 Modify a List Mix Parameters

Parameters	Description
List Id Detail for List Mix with Status	
Method	<p>Select any one method to define the calling pattern of the leads from the multiple lists available. The options are:</p> <ul style="list-style-type: none"> • Even_Mix – In this method, first lead from all lists are dialed, then second lead from all lists and so on. For example, List A has Leads 1, 2, 3 List B has Leads 1, 2, 3 List C has Leads 1, 2, 3 Then A - 1, 2, 3 is called first, followed by List B - 1, 2, 3 and then List C - 1, 2, 3 respectively. • In_Order – In this method, all leads from the first list are dialed first, followed by the second list and so on. For example, Leads of List A -1, List B -1, List C- 1 are dialed first, followed by List A -2, List B -2, List C -2 and then List A -2, List B -2, List C -2 respectively. • Random – In this method, leads are dialed randomly from all the lists. In this case, no algorithm is applied.
LIST ID	Displays the id of the list attached to the campaign.
Priority	Set the priority of the list to define the sequence based on which system dials the leads from the list, applicable only for Even_Mix and In_Order methods.
% Mix	Defines the percentage of leads are called from each list for the Even_Mix method. Make sure that the total should be equal to 100%.
Statuses	You can add your required status for the dialing method.
Add/Delete Statuses For List Mix	Select a status for List Mix.
Difference	This must be equal to zero.
Add a New List Id for List Mix with Status	
List	Displays all lists available. Select a list to configure List Mix. Click Add Entry. The list is added in the above section.
Change	Select a status to apply on the list. If you want to keep the same status for all lists, then click All .
Status	Add status to the list added by selecting a status and clicking Add . The status is added in the previous field, "Change"

7. Once done, click **Submit**.

4.4 Dynamic Prompt

This section provides the details about Dynamic Prompt that enables in developing prompts during run time using the predefined Prompt Data based on its type. For example, prompting a phone number of the customer, billing amount and so on. This means, for Voice Blaster Campaign (such as promotional events), preconfigured IVR prompt file is played that guides the customer through the right resource and solves their queries. This improves the customers experience by providing quick support.

To manage Dynamic Prompt, do the following steps:

- *Creating Dynamic Prompt*
- *Updating, Searching, and Deleting Dynamic Prompt*

4.4.1 Creating Dynamic Prompt

To create a Dynamic Prompt:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Campaign Management**, and then click **Dynamic Prompt**.

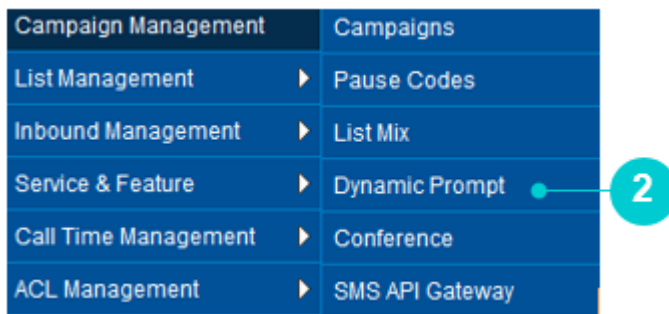


Figure 54 Dynamic Prompt menu

3. Add a New Dynamic Prompt screen appears.
4. The screen is bifurcated into sections.
 - Search for Dynamic Prompt - Provides a way to search Dynamic Prompt details using search criteria.
 - Dynamic Prompt Listing - Provides a list view of existing Dynamic Prompts created in the system, including the details such as Prompt Name, Prompt Data, and Prompt Type. Additionally, you can create, update, search, and delete Dynamic Prompt and view details of a Dynamic Prompt by clicking its Name.
5. To create a new Dynamic Prompt, click **Create**.

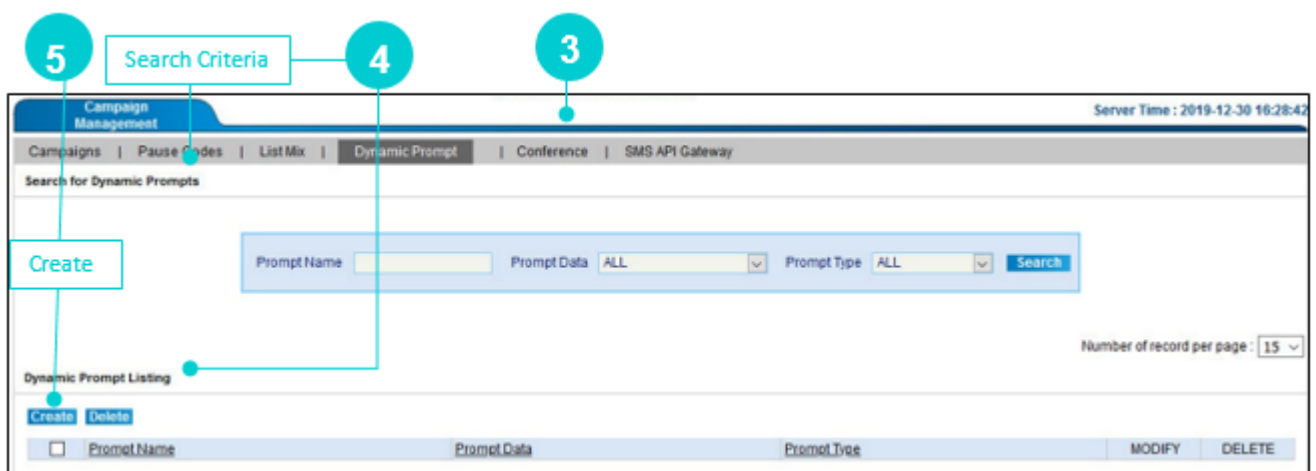


Figure 55 Create Dynamic Prompt

6. Add a New Dynamic Prompt screen appears. Enter the parameters as given in the table.

The screenshot shows the 'Add a New Dynamic Prompt' form in the Campaign Management interface. The form is titled 'Dynamic Prompt Details' and contains the following fields:

- Name ***: Text input field containing 'Postpaid_Offer_1'. A blue circle with the number '6' is positioned above this field.
- Pre Prompt Filename**: File upload field with a 'Browse...' button and the text 'No file selected. (Please upload file with .wav or .mp3 extension)'. A blue circle with the number '7' is positioned below the SUBMIT button.
- Post Prompt Filename**: File upload field with a 'Browse...' button and the text 'No file selected. (Please upload file with .wav or .mp3 extension)'. A blue circle with the number '7' is positioned below the SUBMIT button.
- Prompt Type ***: Dropdown menu with 'Number' selected.
- Prompt Data ***: Dropdown menu with 'Phone Number' selected.
- SUBMIT**: A blue button at the bottom left of the form.

Figure 56 Create Dynamic Prompt

Table 13 Create Dynamic Prompt Parameters

Parameters	Description
Name*	Enter the name of the dynamic prompt
Pre Prompt Filename	Click Browse to play IVR before the prompt.
Post Prompt Filename	Click Browse to play IVR after the prompt.
Prompt Type	<p>Select the type of prompt file. The types are:</p> <ul style="list-style-type: none"> • Number – Plays customer’s phone number in the prompt. For example, a VCB Campaign is created to inform the customer about the available balance. If the “Number” type prompt is selected, then it fetches customer’s number respectively and play the prompt message. • Date - Plays the “Date” as and when required in the prompt message. For example, a VCB Campaign is created to inform customers about the special offers that ends on 22-10-2017. If Date is selected in Prompt Type, each customer gets a prompt like “Celebrate Diwali with 100% Cashback on Recharge of 299 before 14th November 2020”. • Date & Time - Plays the “Date and Time” as and when required in the prompt message.

Parameters	Description
	<p>For example, a VCB Campaign is created to inform customers regarding the last Date and Time to avail discount offers like "Dear customer shop up to 50% discount. The offer ends on 22nd January 2020 at 12.00.00HH: MM".</p> <ul style="list-style-type: none"> • Text to Speech - Lead comment data is sent to the Text to Speech server to generate the IVR files, received on demand and played during the call. • Filename – Filename is prompted in the dynamic prompt in IVR.
Prompt Data	<p>Select the custom field for the Prompt Type selected, to play field data in dynamic prompt. The list of custom fields can be configured from <i>List Management>>List>>Custom Fields</i>.</p>

7. Click **Submit**.
8. A confirmation message appears. Click **Ok**.

4.4.2 Updating, Searching, and Deleting Dynamic Prompt

4.4.2.1 Updating Dynamic Prompt

To update:

1. Click **Edit** corresponding to the Dynamic Prompt on Dynamic Prompt Listing.
2. Modify details as required.
3. Click **Submit**.

4.4.2.2 Searching Dynamic Prompt

To search using filter:

1. Enter Prompt Name or select Prompt Data/Prompt Type.
2. Click **Search**.
3. System returns all Dynamic Prompt details that contain the search term.
4. To get a list of all Dynamic Prompt details, click **Search**.

4.4.2.3 Deleting Dynamic Prompt

Neox provides two ways of deleting the Dynamic Prompt:

- Single Dynamic Prompt deletion – Enables deleting a single Dynamic Prompt configuration.
 1. Select a Dynamic Prompt.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Dynamic Prompts deletion - Enables deleting multiple Dynamic Prompts.
 1. To delete multiple Dynamic Prompts, select the Dynamic Prompts OR to delete all Dynamic Prompts, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

4.5 Conference

This section provides details about Conference that enables in binding Campaign with the available Conference Room to allow conference calls between agent, manager, and customer. Neox DC provides a list of system default Conference Rooms. Using this configuration process, administrator can bind a Conference Room with a Campaign. This enables the agent of the specific Campaign to connect the parked call with the manager using the available conference room. Conference Room is created by the system to address the demand of multi-party conference calls.

To manage Conference, do the following steps:

- *Creating Conference*
- *Updating, Searching, and Deleting Conference*

4.5.1 Creating Conference

To create a Conference:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Campaign Management**, and then click **Conference**.

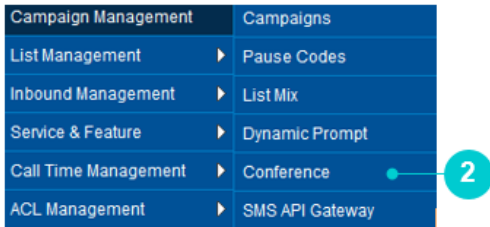


Figure 57 Conference menu

3. Conference screen appears.
4. The screen is bifurcated into sections.
 - Search for Conference - Provides a way to search Conference details using search criteria.
 - Conference Listing - Provides a list view of existing Conferences created in the system, including the details such as Campaign, Conference Number, and In Use. Additionally, you can create, update, search, and delete Conferences.
5. To create a new Conference, click **Create**.

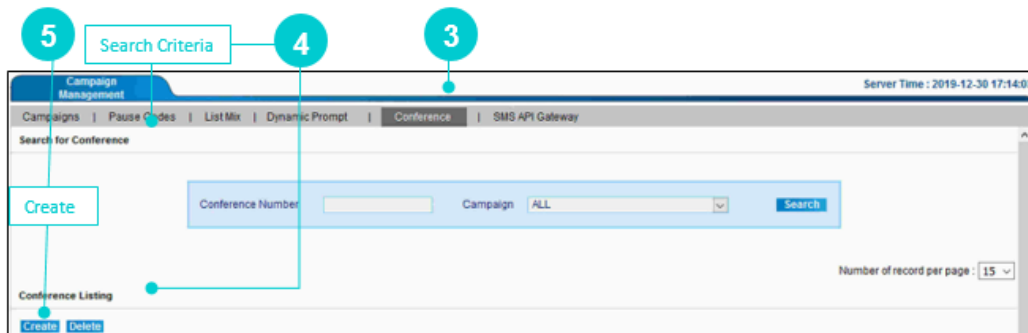


Figure 58 Create Conference

6. Add a New Conference screen appears. Enter the parameters as given in the table.

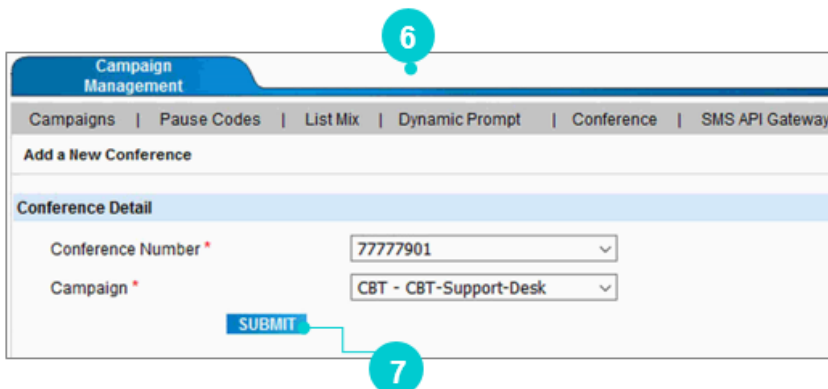



Figure 59 Create Conference

Table 14 Create Dynamic Prompt parameters

Parameters	Description
Conference Number*	Select a number from the predefined list through which agent enters into conference with the customer and a third-party. <hr/>  Note By default, system provides 100 conference rooms
Campaign	Select a campaign to bind the conference room.

7. Click **Submit**.
8. A confirmation message appears. Click **Ok**.

4.5.2 Searching and Deleting Conference

4.5.2.1 Searching Conference

To search using filter:

1. Search using Conference Number/Campaign.
2. Click **Search**.
3. System returns Conference Room details that contain the search term.
4. To get a list of all Conference Room, click **Search**.

4.5.2.2 Deleting Conference

Neox provides two ways of deleting the Conference:

- Single Conference deletion – Enables deleting a single Conference configuration.
 1. Select a Conference.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Conference Rooms deletion - Enables deleting multiple Conference Rooms.
 1. To delete multiple Conference Rooms, select the Conference Rooms OR to delete all Conference Rooms, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

4.6 SMS API Gateway

This section provides details about SMS API Gateway that enables you to integrate Dial Center with third-party SMS API Gateway. You need to specify the SMS API configuration in Dial Center and provide with the details such as customer contact number and message to the third-party API to send the sms to the customer.

To configure SMS API Gateway, do the following step:

- *Configuring SMS API Gateway*

4.6.1 Configuring SMS API Gateway

To configure a SMS API Gateway:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Inbound Management**, and then click **SMS API Gateway**.



Figure 60 SMS API Gateway menu

3. SMS API Gateway screen appears.
4. The screen is bifurcated into two sections; Search for SMS API and SMS API Listing.
 - Search for SMS API - Provides a way to search SMS API details using search criteria.
 - SMS API Listing - Provides a list view of existing SMS APIs created in the system, including the details such as SMS API Name, SMS URL, SMS URL Method and Activating/Deactivating the configuration. Additionally, you can create, update, search, and delete SMS API and view details of an SMS API by clicking its name.
5. To configure a new SMS API, click **Create**.

Search for SMS API

SMS API Name SMS URL METHOD

Number of record per page :

<input type="checkbox"/>	SMS API NAME	SMS URL	SMS URL METHOD	ACTIVE/DEACTIVE	MODIFY	DELETE
<input type="checkbox"/>	test	http://10.121.21.229:9090/admin	GET	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
<input type="checkbox"/>	testik	http://10.121.21.229:9090/admin	GET	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
<input type="checkbox"/>	testiksms	http://10.121.21.229:9090/admin/admin.php?ADD=1121	GET	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
<input type="checkbox"/>	testpost	http://10.121.21.229:9090/admin/admin.php?ADD=1121	POST	<input type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Figure 61 Create SMS API using SMS API gateway filter

6. SMS API Configuration screen appears.

SMS API Configuration

SMS API Name*

SMS API URL *

SMS URL Method GET POST

SMS Static key/value pair *

username=xyz
 password=xyz

Note: one key/value per line
 Exa : key=value
 login=abc@gmail.com

SMS API key for receiver *
Exa : receptionID
 mob_num

SMS API key for Message *
Exa : MsgTXT
 msg

SMS API Message max length *

Enable SMS API Enable

Figure 62 SMS API Configuration


To configure a new SMS API, enter the parameters as given in the table.

For example, SMS URL can be as following:

http://123.XX.XX.XX/blank/sms/user/urlsms.php?username=xyz&pass=xyz&senderid=xyz&dest_mobilen0=XXXXXXXXXX&message=ABCxyz&response=Y

Table 15 Configure SMS API

Parameters	Description
SMS API Configuration	
SMS API Name*	Enter a name to give to the SMS API.
SMS API URL *	Enter an API URL, through which the SMS is sent. This URL is provided by the third-party SMS API Gateway application. For example, http://123.XX.XX.XX/blank/sms/user/urlsms.php?
SMS URL Method	Enter the method through which the SMS is sent. GET is used to view the data without changing it, whereas POST is used for changing the data. For example, a search page should use GET to get data, while a form that changes a password, should use POST. Essentially GET is used to

Parameters	Description
	retrieve remote data, and POST is used to insert/update remote data.
SMS Static key/value pair *	<p>Enter the static key/value pair to send in the sms. For example, here <code>username=xyz, password=xyz</code> and <code>senderid=xyz</code>.</p> <p> Note: Enter one key/value per line For example, key=value login=abc@gmail.com</p>
SMS API key for receiver *	Enter the value, which is the API key for the receiver. For example, <code>dest_mobilen0</code> .
SMS API key for Message *	Enter the message to send to the phone number. This field has the value, which is the API key for message. Here, API key is = message For example, FREEDM, 1234567890 (value of API key for receiver)
SMS API Message max length *	Enter the maximum length of message in characters (Different SMS Gateway support different message length).
Enable SMS API	Activate this SMS API by selecting this option.

Once you activate SMP API Gateway, then select this SMS API in Campaign. To enable, refer *Campaign Management*>>*Campaign*>>*SMS Configuration*.

7. Click **Submit**.

4.6.2 Updating, Searching, and Deleting SMS API Gateway

4.6.2.1 Updating SMS API Gateway

To update:

1. Click **Edit** corresponding to the SMS API Name on SMS API Listing.
2. Modify details as required. a new Pause Code Name.
3. Click **Submit**.



<input type="checkbox"/>	SMS API NAME	SMS URL	SMS URL METHOD	ACTIVE/DEACTIVE	MODIFY	DELETE
<input type="checkbox"/>	DCSMS	http://123.XX.XX.XX/blank/sms/user/urlsms.php?	GET	-		X

Figure 63 Edit SMS API Gateway

4.6.2.2 Searching SMS API Gateway

To search using filter:

1. Enter SMS API Name / SMS Url Method.
2. Click **Search**.
3. System returns SMS API Gateways details that contain the search term.
4. To get a list of all SMS API Gateway details, click **Search**.

4.6.2.3 Deleting SMS API Gateways

To delete:

1. Click **Delete** corresponding to the SMS API Name on SMS API Listing.
2. Click **Delete**.



<input type="checkbox"/>	SMS API NAME	SMS URL	SMS URL METHOD	ACTIVE/DEACTIVE	MODIFY	DELETE
<input type="checkbox"/>	DCSMS	http://123.XX.XX.XX/blank/sms/user/urlsms.php?	GET	-		X

Figure 64 Edit Pause Code

5. List Management

This chapter provides information about List Management that manages the leads comprehensively through a single place. Lead Management is important to business and hence it is important to create new and manage existing in an organization. List Management in Neox DC enables the administrator to create List for Campaign, bulk upload Leads, add custom Leads List fields, Lead Rechurn, manage Callback, and configure CRM Database.

Contents:

- *List*
- *Load a New Load*
- *List Custom Fields*
- *Copy Custom Fields*
- *Lead Rechurn*
- *Callback Management*
- *CRM Database Configuration*

5.1 List

This section provides information about List creation process that facilitates in creating List for managing Leads contact information. After you create a List, it is bind with the Campaign. An Agent who logs in its Campaign gets access to this List to process calls to the prospective leads. List helps in organizing Leads and tracking calls.

To manage Lists, do the following:

- *Creating Lists*
- *Configuring CRM Data*
- *Updating, Searching, and Deleting Lists*

5.1.1 Creating Lists

To create a new List:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **List Management**, and then click **List**.

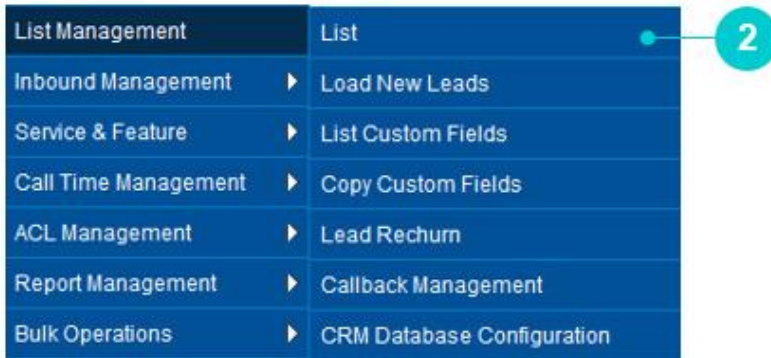


Figure 65 List Management menu

3. List screen appears.
4. The screen is bifurcated into two sections; Search for List and List Listing.
 - Search for List - Provides a way to search List details using search criteria.
 - List Listing- Provides a list view of existing List created in the system with the details such as List ID, List Name, Leads Count, Lead Expire Days, Campaign, and Callback Count and downloading Leads Info. Additionally, you can create, update, search, and delete Lists and view details by clicking its List ID.
5. To create a new List, click **Create**.

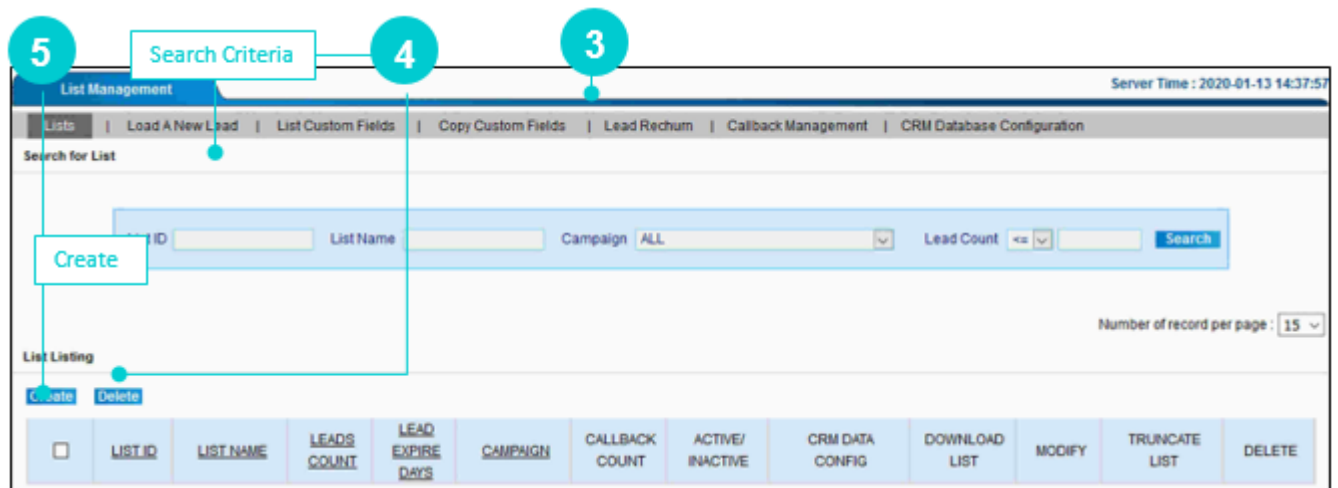


Figure 66 Create List

6. Add a New List screen appears. Enter the parameters as given in the table.

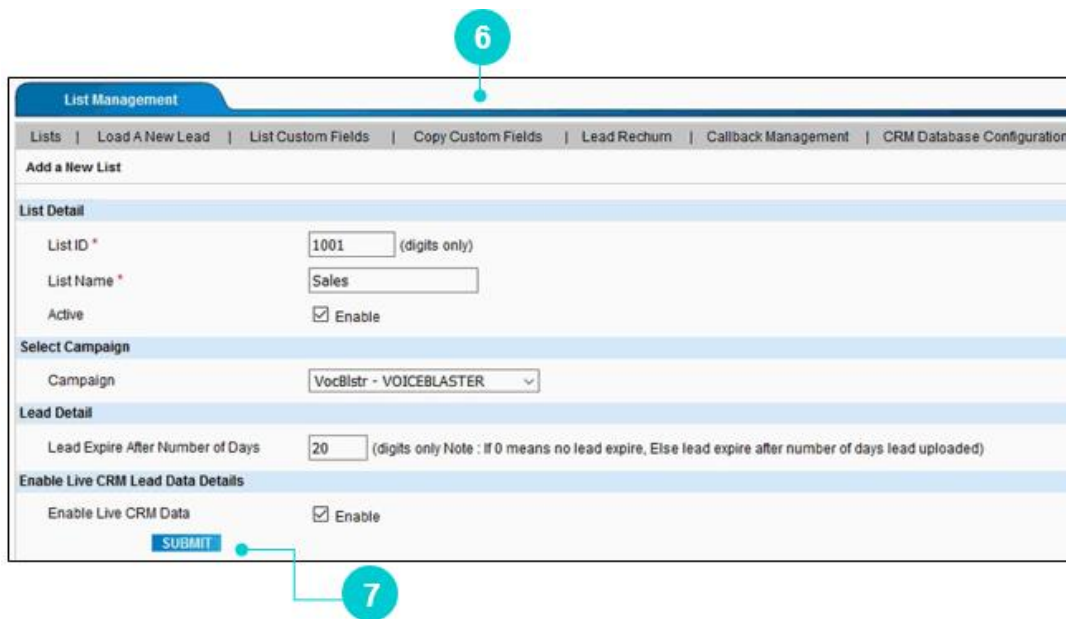


Figure 67 Create List

Table 16 Create List parameters

Parameters	Description
List Detail	
List ID *	Enter the numerical name of the List. This number is not editable after initial submission. It must be between 3 and 8 characters in length and greater than 100.
List Name *	Enter a name that you want to give to the List.
Active	Activate this List to allow dialing leads from this list.
Select Campaign	
Campaign	Select a Campaign to bind this List. When an Agent logs in to its Campaign, then the list bind with the Campaign is only accessible to the Agent for dialing leads.
Lead Detail	
Lead Expire After Number of Days	Enter the number of days up to which the leads remain active. Leads get inactive, after a defined number of days. If 0 is given, then lead never expires.

7. Click **Submit**.

8. A confirmation message appears. Click **Ok**.

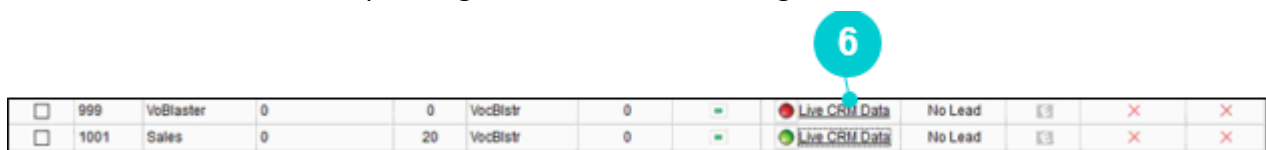
5.1.2 Configuring CRM Data

Data comes from CRM Database Configuration. After the list is created, then you configure CRM Data. CRM DATA is displayed in two ways:

Red color indicates CRM data is not activated in the List, whereas Green color indicates, CRM is activated in the List.

To configure CRM Data:

1. Click **Live CRM Data** corresponding to the List on List Listing.



Check	ID	Name	Count	Parent	Count	Parent	Count	Live CRM Data	No Lead	ES	×	×
<input type="checkbox"/>	999	VoBlaster	0	0	VocBlstr	0	-	● Live CRM Data	No Lead	ES	×	×
<input type="checkbox"/>	1001	Sales	0	20	VocBlstr	0	-	● Live CRM Data	No Lead	ES	×	×

Figure 68 Live CRM Data

2. CRM Field Map Configuration screen appears.
3. Enter the configuration as given in the table.

Table 17 Configuring CRM Data

Parameters	Description
CRM Lead Data Enable	You can view this option is already selected, if CRM is activated while creating List. However, if CRM is deactivated, then select this option and click Submit to activate CRM.
CRM Database Property Detail	
Live CRM Database Name*	Select database name of CRM that is configured from <i>List Management</i> >> <i>CRM Database Configuration</i> .
Source To Destination Field Map Details	
CRM Table Name*	Enter the CRM Table Name.
Lead Duplicate	Allow to store CRM Lead into Neox.
CRM Field Update	Allow to update customer details in CRM.
CRM & Neox Field Parameters – Map CRM fields with Neox.	
CRM Field Name	Enter the CRM Field Name to map with the Neox Field Name, selected in the next field.
Neox Field Name	Select the field name to map with the CRM field.

Parameters	Description
Unique Parameter	
Apply Value	Select <i>Static</i> or <i>Dynamic</i> to apply the value to the CRM and Neox field.
CRM Field	Enter value for CRM field.
Neox Field	Enter value for Static and select a value for Dynamic.

5.1.3 Downloading Lead Info

You may also download leads info. For this:

1. Click **Lead Info** in List Listing.

<input type="checkbox"/>	<u>LIST ID</u>	<u>LIST NAME</u>	<u>LEADS COUNT</u>	<u>LEAD EXPIRE DAYS</u>
<input type="checkbox"/>	111	Services	147 Lead Info	0

Figure 69 Lead Info

2. Use the search criteria to download leads information.
3. Click **CSV** to download Lead info.
4. Download Lead Information screen appears.
5. You can download in three ways:
 - Extended Data (Default + Custom + System (DC)) - Provides additional information about the leads, such as lead id, entry date, modify date, user id, status, called count, called since last reset, new lead on incoming call, and customer dispo status, and so on.
 - Lead Data (Default + Custom) - Provides information about the leads that are displayed on the screen.
 - Lead Traverse Data – Provides information about the leads dialed per campaign in this report. The report includes number of times a lead is dialed in fifteen attempts by the agent. The report may include first fifteen attempts or last fifteen attempts, based on configuration.

Download Lead Information
close [X]

Extended Data Lead Data Lead Traverse Data

Figure 70 Download Lead Information

5.1.4 Updating, Searching, and Deleting Lists

In addition to performing List creation, you may also update, search, and delete (single and bulk) Lists.

5.1.4.1 Updating Lists

To update:

1. Click **Edit** corresponding to the List.
2. Modify a List screen appears.
3. Modify details as required. You cannot modify List ID.
4. When you modify a List, then you may also view and perform other configuration as given in the table.

Table 18 Modify List

Parameters	Description
Lead Reset Detail	
Reset Lead-Called-Status for this list	This resets all leads in this list to N for "not called since last reset" and means that any lead can now be called if it is the right status as defined in the campaign screen. After you call through a list once, you need to reset the list before those leads can be called again.
Reset Times	Enter a time to allow the system reset the List. The format is HHMM and time must be in 24-hour format. For example, if you wanted the system to reset the list at 5:00 am and 5:00 pm every day, then enter the time in 24 hours formatted, separated by a dash - , like 0500-17:00.
List Date	
List Change Date	Displays the last time that the settings for this list were modified.
List Last Call Date	Displays the last time that a lead was dialed from this list.

5. Click **Submit** to save the details.
6. If you want to delete the List, click **Delete**.

5.1.4.2 Searching List

To search using filter:

1. Enter ListID/List Name or you may select Campaign or use Lead Count.
2. Click **Search**.
3. System returns Lists details that contain the search term.
4. To get a list of all List details, click **Search**.

5.1.4.3 Deleting Lists

Neox provides two ways of deleting the Lists:

- Single List deletion – Enables deleting a single List.
 1. Select a List.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Lists deletion - Enables deleting multiple Lists.
 1. To delete multiple Lists, select the Lists OR to delete all Lists, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

5.2 Load a New Lead

This section provides information about bulk importing leads than entering them manually. You may import a new Lead or update existing Leads in the same List. The Leads are uploaded in the CSV format and may contain the information in any structure. When new Leads are uploaded in a List in different structure, then existing Leads display blank values for the fields added in the new Leads. While uploading List, you may either upload the Leads in a standardized format or customized format to meet the requirements.

To load a new Lead, do the following steps:

- *Loading new Leads*

5.2.1 Loading New Leads

To load a new Lead:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **List Management**, and then click **Load New Leads**.

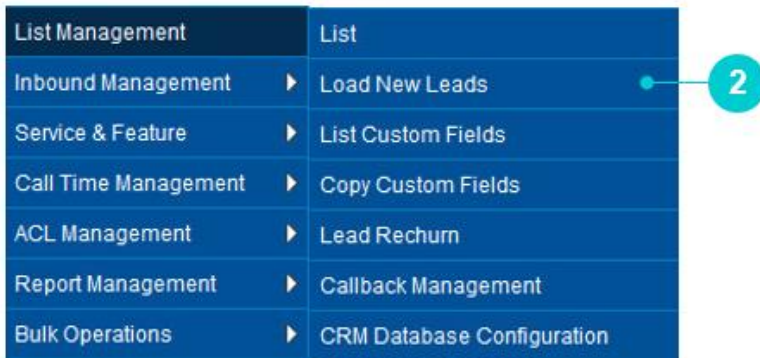


Figure 71 Load New Leads menu

3. Load New Leads screen appears.
4. To load a new Lead, enter the parameters as given in the table.

List Management

Lists | **Load A New Lead** | List Custom Fields | Copy Custom Fields | Lead Rechurn | Callback Management

Load New Leads

Do you want to upload master file

For Download sample file of Standard Format [Click hear](#)

Load leads from this file * No file chosen

(Recommendations : During operation hours upload limit should not exceed 10,000 records, while in off hours it can be 50,000 records. Maximum file size should not exceed 10MB)

List ID Override (numbers only or leave blank for values in the file)

Phone Code Override (numbers only or leave blank for values in the file)


File layout to use Standard Format Custom layout

Lead Duplicate Check (numbers only or leave blank for values in the file)

Lead Time Zone Lookup

Figure 72 Load New Leads

Table 19 Load New Leads Parameters

Parameters	Description																								
Load leads from this file	<p>Browse and upload a Lead file in CSV format to load the leads in the system. It is recommended to upload leads not exceeding 10,000 records during operation hours and up to 50,000 in off hour. Maximum file size should not exceed 10 MB.</p>																								
List ID Override	<p>You may select a List ID from the given options, if you want to upload the new Leads in an existing List.</p> <hr/> <p> Note Leaves blank for values in the file.</p>																								
Phone Code Override	<p>Enter a phone code to append to the Leads phone number in the List.</p>																								
File layout to use	<p>You may select file layout option to upload Leads.</p> <ul style="list-style-type: none"> • Standard Format – Select this option, if you are using standard field format. The standard format must have data stored horizontally and then vertically. In this case, system first considers the data in rows and then column. • Custom Layout – Select this option, if you want to map the fields before importing the leads. This means, while uploaded Leads, system asks to map the fields given in the List with the system defined format. • When you select this option, then a screen appears, wherein you need to map the system fields in ECDIAL column with that of the Field data. • Doing so, click OK to Process to complete mapping process. <div data-bbox="608 1417 1347 1933" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center; font-size: small;">Processing CSV file...</p> <p style="text-align: center; font-size: x-small;">LIST ID OVERRIDE FOR THIS FILE: 444</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e1f5fe;"> <th style="text-align: left; padding: 5px;">ECDIAL Column</th> <th style="text-align: left; padding: 5px;">File data</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">PHONE NUMBER:</td> <td style="padding: 5px;">"Phone Number" <input type="text"/></td> </tr> <tr> <td style="padding: 5px;">PHONE CODE:</td> <td style="padding: 5px;">"Phone Code" <input type="text"/></td> </tr> <tr> <td style="padding: 5px;">COUNTRY CODE:</td> <td style="padding: 5px;">"Country Code" <input type="text"/></td> </tr> <tr> <td style="padding: 5px;">ALTERNATE NUMBER 1:</td> <td style="padding: 5px;">"Alternate Number 1" <input type="text"/></td> </tr> <tr> <td style="padding: 5px;">ALTERNATE NUMBER 2:</td> <td style="padding: 5px;">"Alternate Number 2" <input type="text"/></td> </tr> <tr> <td style="padding: 5px;">AGENT ID:</td> <td style="padding: 5px;">"First Name" <input type="text"/></td> </tr> <tr> <td style="padding: 5px;">CONTACT PERSON:</td> <td style="padding: 5px;">"Contact Person" <input type="text"/></td> </tr> <tr> <td style="padding: 5px;">ENTRY DATE:</td> <td style="padding: 5px;">"Entry Date" <input type="text"/></td> </tr> <tr> <td style="padding: 5px;">LAST DATE:</td> <td style="padding: 5px;">"Last Date" <input type="text"/></td> </tr> <tr> <td style="padding: 5px;">OUTBOUND LEAD PRIORITY:</td> <td style="padding: 5px;">"Outbound Lead Priority" <input type="text"/></td> </tr> <tr> <td style="padding: 5px;">INBOUND LEAD PRIORITY:</td> <td style="padding: 5px;">"Inbound Lead Priority" <input type="text"/></td> </tr> </tbody> </table> <p style="text-align: center; margin-top: 10px;"> <input type="button" value="OK TO PROCESS"/> <input type="button" value="RELOAD PAGE"/> </p> </div> <p style="text-align: center; margin-top: 10px;"><i>Figure 73 Map fields</i></p>	ECDIAL Column	File data	PHONE NUMBER:	"Phone Number" <input type="text"/>	PHONE CODE:	"Phone Code" <input type="text"/>	COUNTRY CODE:	"Country Code" <input type="text"/>	ALTERNATE NUMBER 1:	"Alternate Number 1" <input type="text"/>	ALTERNATE NUMBER 2:	"Alternate Number 2" <input type="text"/>	AGENT ID:	"First Name" <input type="text"/>	CONTACT PERSON:	"Contact Person" <input type="text"/>	ENTRY DATE:	"Entry Date" <input type="text"/>	LAST DATE:	"Last Date" <input type="text"/>	OUTBOUND LEAD PRIORITY:	"Outbound Lead Priority" <input type="text"/>	INBOUND LEAD PRIORITY:	"Inbound Lead Priority" <input type="text"/>
ECDIAL Column	File data																								
PHONE NUMBER:	"Phone Number" <input type="text"/>																								
PHONE CODE:	"Phone Code" <input type="text"/>																								
COUNTRY CODE:	"Country Code" <input type="text"/>																								
ALTERNATE NUMBER 1:	"Alternate Number 1" <input type="text"/>																								
ALTERNATE NUMBER 2:	"Alternate Number 2" <input type="text"/>																								
AGENT ID:	"First Name" <input type="text"/>																								
CONTACT PERSON:	"Contact Person" <input type="text"/>																								
ENTRY DATE:	"Entry Date" <input type="text"/>																								
LAST DATE:	"Last Date" <input type="text"/>																								
OUTBOUND LEAD PRIORITY:	"Outbound Lead Priority" <input type="text"/>																								
INBOUND LEAD PRIORITY:	"Inbound Lead Priority" <input type="text"/>																								

Parameters	Description
	<ul style="list-style-type: none"> • Wait for the file upload process to get completed.
Lead Duplicate Check	<p>Checks for the duplication of the Leads in the List. Following actions can be performed on Lead Duplicate Check:</p> <ul style="list-style-type: none"> • Allow Duplicate List - Allows adding duplicate leads in the current list. • Avoid Duplicate List – Does not allow adding duplicate leads in the list. On selecting this, two options are displayed. <ul style="list-style-type: none"> ▪ Including Phone Number - Checks for duplicate entry including the phone number in the list. ▪ Excluding Phone Number - Checks for duplicate entry excluding the phone number in the list. • Override Duplicate List - Allows overriding duplicate leads in the list. This gives two options: <ul style="list-style-type: none"> ▪ Including Phone Number - Checks for duplicate entry including the phone number in the list. ▪ Excluding Phone Number - Checks for duplicate entry excluding the phone number in the list. <p>The custom layout is accessible through <i>List Management>>List Custom Fields>>Modify Custom Fields</i>.</p>
Lead Time Zone Lookup	<p>Enabling this field offers more accurate time zone coding of lead file. For instance, A list 1001 is created, consisting of leads and their zip codes. Now, enabling "POSTAL CODE FIRST" can facilitate to lookup for the lead faster compared to zip codes. This helps in more accurate time zone coding of the lead file, than just using area code and country code to determine time zone otherwise.</p>
Do you want to upload master file	Check the checkbox to upload the master CSV file

 **Note**

Reload page resets all parameters.

5. Once done, click **Submit**.
6. A confirmation message appears. Click **Ok**.

5.3 List Custom Fields

This section provides information about List Custom Fields that is used to create customer details form to fill in customer details at the time of the call. These details are stored in Neox and pops up, when the same customer calls again. The fields of the form can be customized by the company using List Custom Fields, as per their requirement. Additionally, system also displays default fields (grey color) that cannot be modified. The position of these fields can be changed as required. The form fields displayed on this screen are also displayed in *List Management>>Leads Info*.

To manage List Custom Fields configuration, do the following:

- *Modifying List Custom Field*
- *Creating List Custom Field*
- *Selecting Shift Mode*
- *Searching List Custom Field*

To configure List Custom Fields, do the following:

1. Add a Tab in List Custom Field from *List Management>>List Custom Fields*. For example, Office Address.
2. Add a new Custom Field for the tab.
3. Modify or create a List, let's say 3333, and bind with the Campaign, let's say AOH, from *List Management>>List*.
4. Bind Agent User Group's, let's say AOH with the same Campaign AOH from *User Management>>User Group*.
5. Bind Agent, let's say agent01 with the same User Group, AOH from *User Management>>Users*.

Now, Agent can log in to its account and can view the new custom fields as following:

The screenshot shows the Neox Contact Center interface for Sterlite Technologies. The agent is logged in as 'agent-01'. The interface displays a 'Customer Info | Script' section with a 'NO LIVE CALL' indicator. A custom field tab labeled 'Office Address' is active, showing a text input field with the placeholder text 'Enter the Office Address of the customer.' Below this, there is a 'Log History' section with a table of call records.

#	Call Date	Status	User	Phone Number
1	2020-01-16 14:40:20	INVA	agent-01	12345
2	2020-01-16 14:39:54	A	agent-01	12345
3	2020-01-16 13:22:47	TBDFC	agent-01	12345
4	2020-01-09 15:39:53	ADSC	agent	12345

Figure 74 Custom Field Tab

5.3.1 Modifying List Custom Field

To modify List Custom Fields:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **List Management**, and then click **List Custom Fields**.

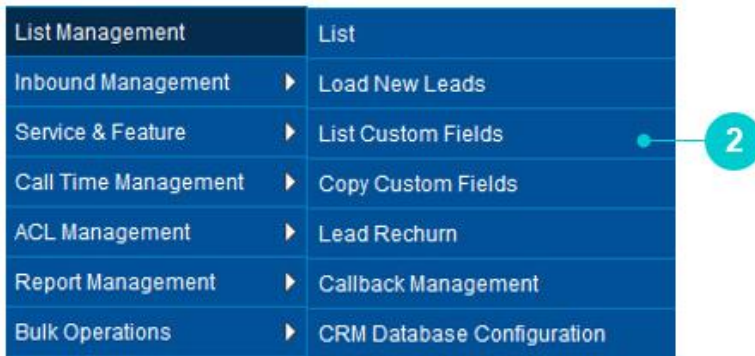


Figure 75 List Custom Fields menu

3. List Custom Fields screen appears.
4. The screen is bifurcated into two sections; Search for List With Custom Field Count and List Listing With Custom Field Count.
 - Search for List with Custom Field Count - Provides a way to search custom field details.
 - List Listing with Custom Field Count - Provides a list view of existing Custom Fields Lists created in the system with the details such as List ID, List Name, Active Status, and Campaign, Custom Fields Count. Additionally, you can modify and create Custom Fields Layout and view details by clicking its List ID.
5. To modify a new List, click **Modify Custom Field** corresponding to the List.

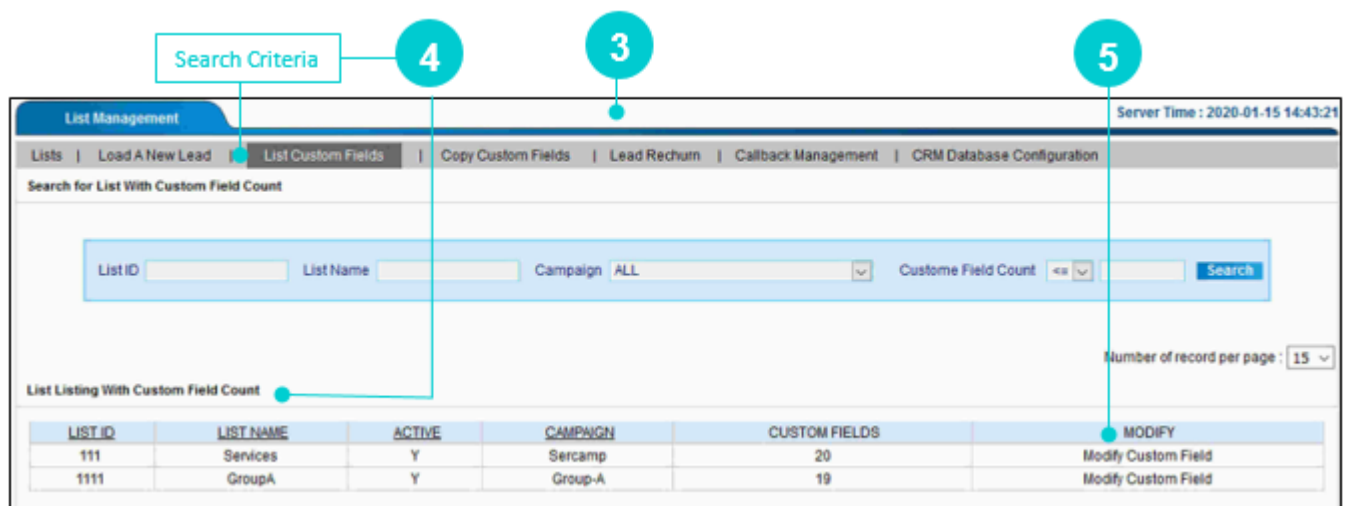


Figure 76 List Custom Fields

- 6. Modify Custom Field screen appears. On this screen, you can modify and add new custom field. Enter the parameters as given in the table.

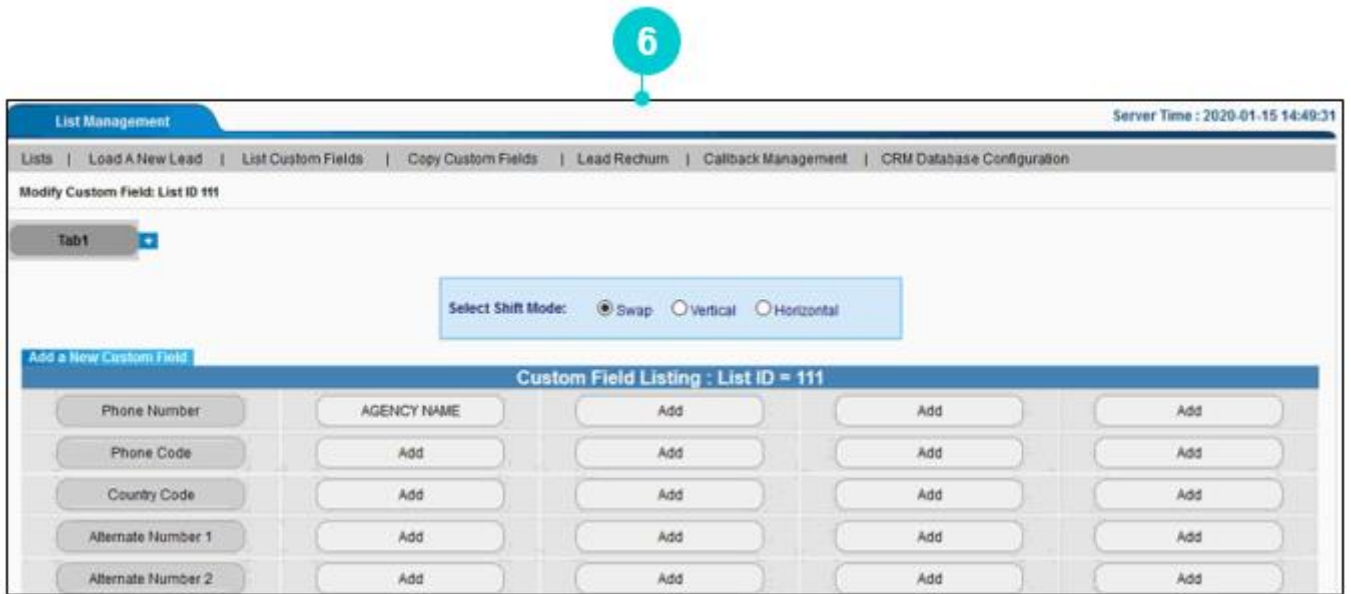


Figure 77 List Custom Fields Parameters

5.3.2 Creating List Custom Field

You can create List Custom fields for the existing Tab or new tab.

If you want to create List Custom fields for existing Tab, then:

1. Click **Tab1**.
2. You can find default system field appears. These fields are not editable.

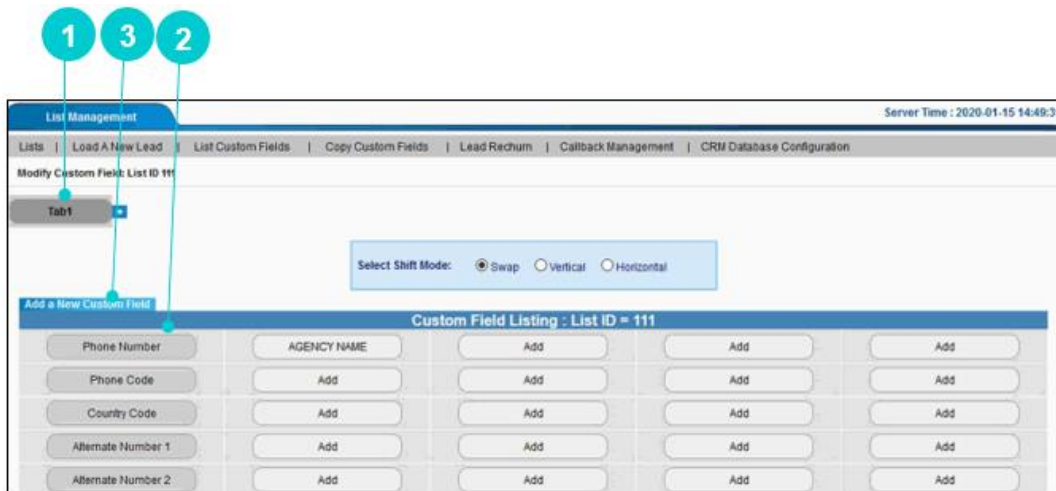


Figure 78 Add New Custom Fields

3. If you want to add a new Custom Field for the form, then click **Add**.
4. Add a new custom field for this List. Enter the parameters as given in the table.

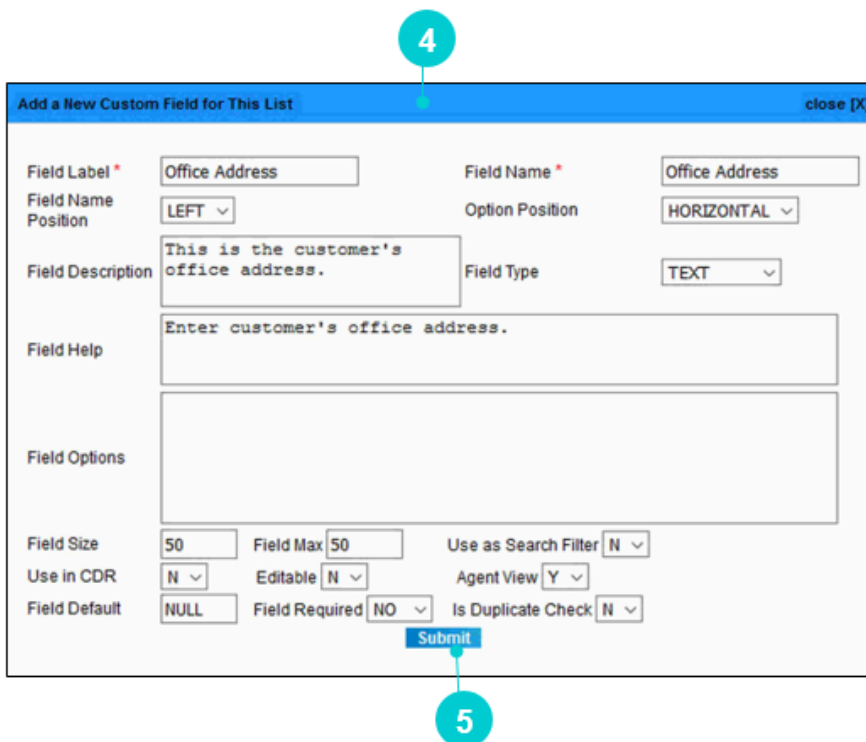

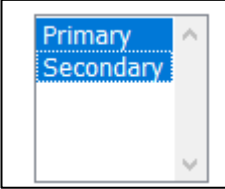



Figure 79 Add a new custom field for this List

Table 20 Add New Custom Field Parameters

Parameters	Description
Field label*	Enter the label to give to this custom field. This is stored in the system database.
Field Name*	Enter the name to give to this custom field. This is displayed on the Agent's portal and Report.
Field Name Position	Select the position where you want to display the custom field. The options available are: <ul style="list-style-type: none"> • Left • Top
Option Position	Select position to display the Options on the Agent's portal. Options are displayed as: <ul style="list-style-type: none"> • Horizontally – Displays the field in horizontal position. • Vertically – Displays the field in vertical position.
Field Description	Enter the description of the field. This is stored in the system.
Field Type	<p>Select the type of field you wanted to create. The available options are:</p> <ul style="list-style-type: none"> • Text – Select Text and enter “Field Size” to provide text field to the agent. For example, if Field Type of “Text” and Field Size is 20, then the field looks like: <div data-bbox="564 1167 1396 1240" data-label="Image"> </div> • Area – Defines the area to enter the text in this field. You can define the area breath in “Field Size” and length in “Field Max”. For example, suppose Field Size 20 and Field Max 10, then area looks like: <div data-bbox="564 1429 1358 1756" data-label="Image"> </div> • Select – Allows creating a drop-down list. For this, enter the “Field Options” as: <ul style="list-style-type: none"> ▪ option_1, value_1 ▪ option_2, value_2 For example, suppose Field Options are given as: <ul style="list-style-type: none"> ▪ Primary_1, Primary

Parameters	Description
	<ul style="list-style-type: none"> ▪ Secondary_2, Secondary <p>The result looks like this:</p>  <ul style="list-style-type: none"> • Multi – Allows an Agent to select multiple options from the given list. For this, enter the “Field Options” as: <ul style="list-style-type: none"> ▪ option_1, value_1 ▪ option_2, value_2 For example, suppose Field Options are given as: <ul style="list-style-type: none"> ▪ Primary_1, Primary ▪ Secondary_2, Secondary <p>The result looks like this:</p>  • Radio – Allows an Agent to select option from the radio button. For this, enter the “Field Options” as: <ul style="list-style-type: none"> ▪ option_1, value_1 ▪ option_2, value_2 For example, suppose Field Options are given as: <ul style="list-style-type: none"> ▪ Primary_1, Primary ▪ Secondary_2, Secondary  • Checkbox – Allows an Agent to select the checkbox. For this, enter the “Field Options” as: <ul style="list-style-type: none"> ▪ option_1, value_1 ▪ option_2, value_2 For example, suppose Field Options are given as: <ul style="list-style-type: none"> ▪ Primary_1, Primary

Parameters	Description
	<ul style="list-style-type: none"> ▪ Secondary_2, Secondary <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <input type="checkbox"/> Primary <input type="checkbox"/> Secondary </div> <ul style="list-style-type: none"> • Date – Allows an Agent to select Date. For this, Agent has to enter the date in YYYY-MM-DD format. By default, displays current date. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> 2020-01-16 </div> <ul style="list-style-type: none"> • Time - Allows an Agent to select Time. For this, Agent has to enter the date in HH:MM format. By default, displays current time. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> 17 ▾ 41 ▾ </div> <ul style="list-style-type: none"> • Display – Allows in displaying any information in simple text. • Script – Allow you to enter the script in “Field Options” and display on the Agent’s screen as follows: <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Please provide your address. </div> <ul style="list-style-type: none"> • Image – Allows an Agent to upload an image by clicking Browse. The result looks like this: <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Browse... No file selected. </div>
Field Help	<p>Enter any help text to provide additional information to the Agent. This is displayed as “help+” on the Agent’s screen:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 40%;">Office Address</div> <div style="width: 55%; border: 1px solid black; height: 100px; position: relative;"> help+ </div> </div> </div> <p>When Agent clicks on help+, then the following help text appears. To close, click help-.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Browse... No file selected. help- Upload Office Address proof of the customer. </div>
Field Options	Provides a text area where you enter the options for Select, Multi, Radio, Checkbox, and Script types.
Field Size	Enter the width of the field area. This option is applicable for Text, Area, Select, and Multi.
Field Max	Enter the length of the field area. This option is applicable for Text, Area, Select, and Multi.

Parameters	Description
Use a Search Filter	If you want to add this custom fields as a search filter, then select “Y”.
Use In CDR	Select this option to display custom field in CDR reports. Make sure to filter CDR report by Campaign to view this custom field. Default value is “N”.
Editable	Makes this field editable, so you can later modify it in CDR, as required. Default value is “N”.
Agent View	Select this option to display the custom field on the Agent’s portal. Default value is “Y”.
Field Default	Enter a value that is the default value of the custom field. By default, 0 is the Field Default value. This is applicable for Text.
Field Required	Select this option to make this custom field mandatory.
Is Duplicate Check	Select this option to check if the custom field is duplicate or not.

- Once done, click **Submit**.
- If you want to add an additional Tab, then click +, wherein you can add detailed information of the customer, during a call. In such cases, there wouldn't be time to create a new layout for the same. Hence, adding a new tab makes it easy to start filling the customer information.



Figure 80 Add Tab

- Add a New Tab screen appears.
- Enter the Tab name and click **Submit**.

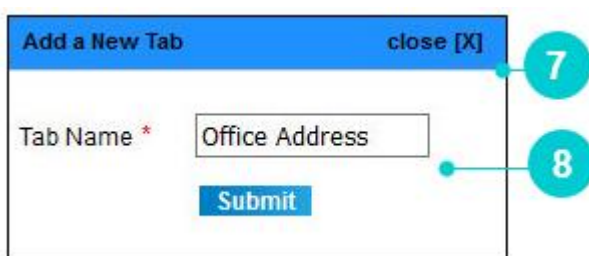


Figure 81 Add a New Tab

- The form preview can be viewed below.

5.3.3 Selecting Shift Mode

You can move the position of the custom fields in a form in three ways:

- Swap – Allows swapping the field names.
- Vertical – Allows changing the position of the custom field vertically.
- Horizontal – Allows changing the position of the custom field horizontally.

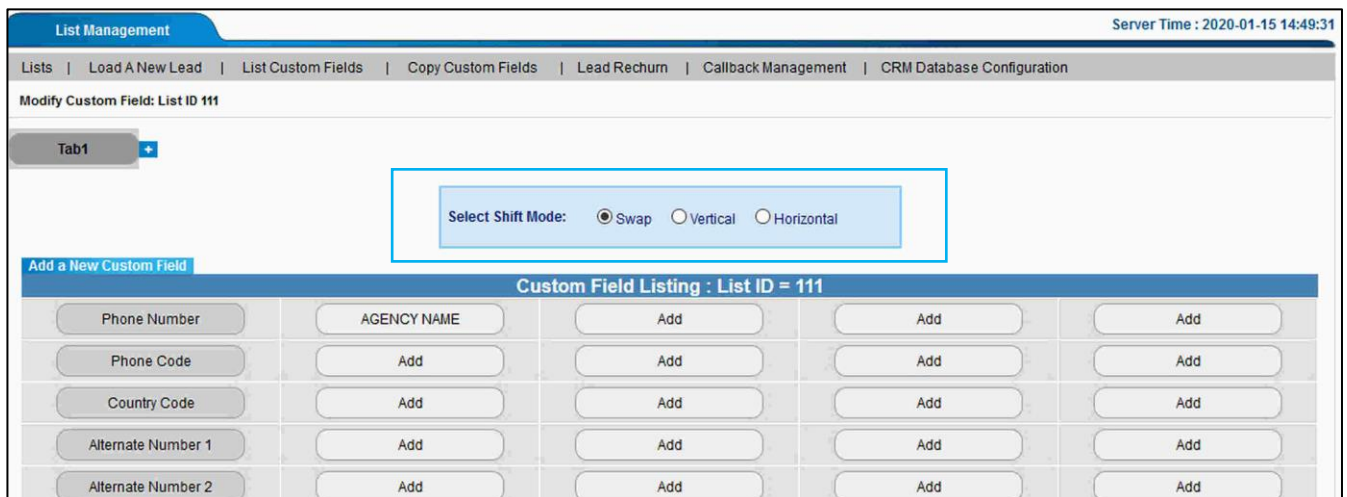


Figure 82 Shift Mode

5.3.4 Searching List Custom Field

To search using filter:

1. Enter ListID/List Name or you may select Campaign or use Custom Field Count.
2. Click **Search**.
3. System returns Custom Field Count details that contain the search term.
4. To get a list of all Custom Field Count details, click **Search**.

5.4 Copy Custom Fields

This section provides information about copying custom fields from an existing list to the new list.

To copy Custom Fields, do the following step:

- *Copying Custom Fields*

5.4.1 Copying Custom Fields

To copy Custom Fields:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **List Management**, and then click **Copy Custom Fields**.

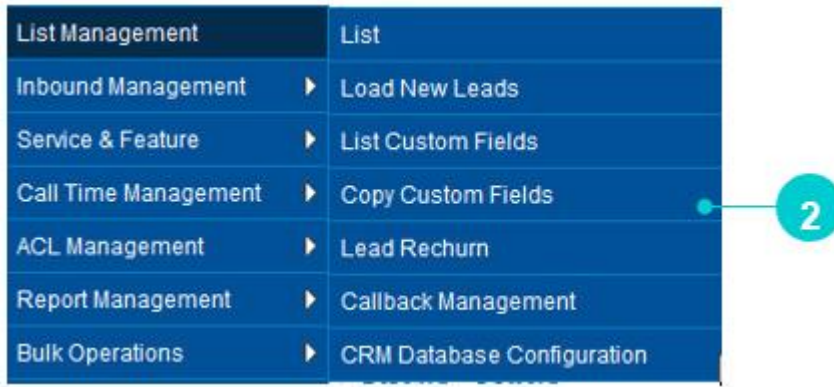


Figure 83 Copy Custom Fields menu

3. Copy Custom Field screen appears. To copy a Custom Field, enter the parameters as given in the table.



Figure 84 Copy Custom Field

Table 21 Copy Custom Field Parameters

Parameters	Description
List ID to Copy Fields From	Select a List ID from which the custom fields are to be copied to the new list.
List ID to Copy Fields to *	Enter a unique List ID to copy the custom fields to. Make sure that the entered List ID is not available in the system.
Campaign	Select a Campaign to bind the newly created list.

4. Once done, click **Submit**.

5. This creates a new Custom Field copying only the existing Custom Fields.

5.5 Lead Rechurn

This section provides information about Lead Rechurn, which enables the administrator to re-churn the leads from one campaign list to another campaign list. This enables the agent to dial already dialed leads. This list is bind to the agent, wherein the agent can dial the leads again.

To configure Lead Rechurn, do the following step:

- *Configuring Lead Rechurn*

5.5.1 Configuring Lead Rechurn

To configure Lead Rechurn:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **List Management**, and then click **Lead Rechurn**.

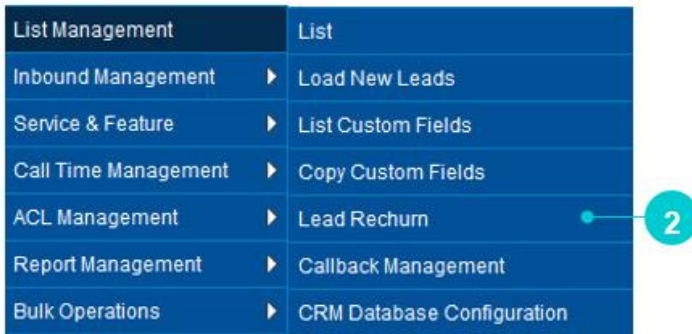


Figure 85 Lead Rechurn menu

3. Lead Rechurn screen appears.

To configure Lead Rechurn, enter the parameters as given in the table.

Lead Rechurn

List Detail

Source List *

Target List *

Disposition Statuses *

- Select All
- DISPO-Improperly Disposed
- DROP-Agent Not Available
- INCALL-Lead Being Called
- All Not Selected

Date Time From To

Max Called Count

User

- DC101-DC2
- agent-James

SUBMIT

Figure 86 Lead Rechurn

Table 22 Lead Rechurn Parameters

Parameters	Description
Source List	Select the List ID from which you want to take the leads for re-churn. You can move only those Leads from one list to another list (should have same Custom Fields in both lists).
Target List	Select the List ID to which all the leads are moved from the Source list.
Disposition Statuses	Select Disposition statuses, which need to be re-churned. The statuses displayed here are from Target List of Campaign.
Date Time	Select the Date range and Time from the “From” and “To” field to transfer leads. This date is the last modified date or last called date of the leads.
Max Called Count	Apply condition to filter the leads from the List. For example, if agent has called a lead four times, then enter 4.
User	Select particular user’s leads to be called.

4. Once done, click **Submit**.
5. This creates a new List.

5.6 Callback Management

This section provides information about Callback Management that enables the administrator to transfer the customer's callback request from one agent to another agent of the same campaign. When a customer's callback request is scheduled by an agent, then the same appears on Callback Management. Administrator can then use the search criteria given to filter the callback requests and transfer them from one agent to another, if an agent is not available.

To transfer Callback request, do the following steps:

- *Searching Callback Requests*
- *Transferring Callback Requests*
- *Updating and Deleting Callback Requests*
- *Exporting Callback Requests to CSV*

5.6.1 Searching Callback Requests

To transfer Callback Requests:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **List Management**, and then click **Callback Management**.

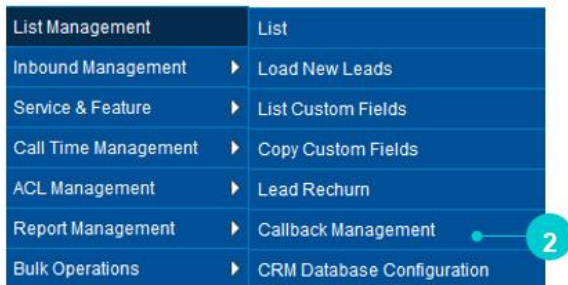


Figure 87 Callback Management menu

3. Callback Management screen appears.
4. The screen is bifurcated into two sections; Search for Callback and Callbacks Listing.
 - Search for Callback - Provides a way to search Callback details using search criteria.
 - Callback Listing- Provides a list view of existing Callback requests created in the system with the details such as List ID, Campaign, User Group, User, Entry Date, Callback Time, Status, Recipient Name. Additionally, you can transfer, update, search, and delete Callback requests and view details by clicking its List ID.

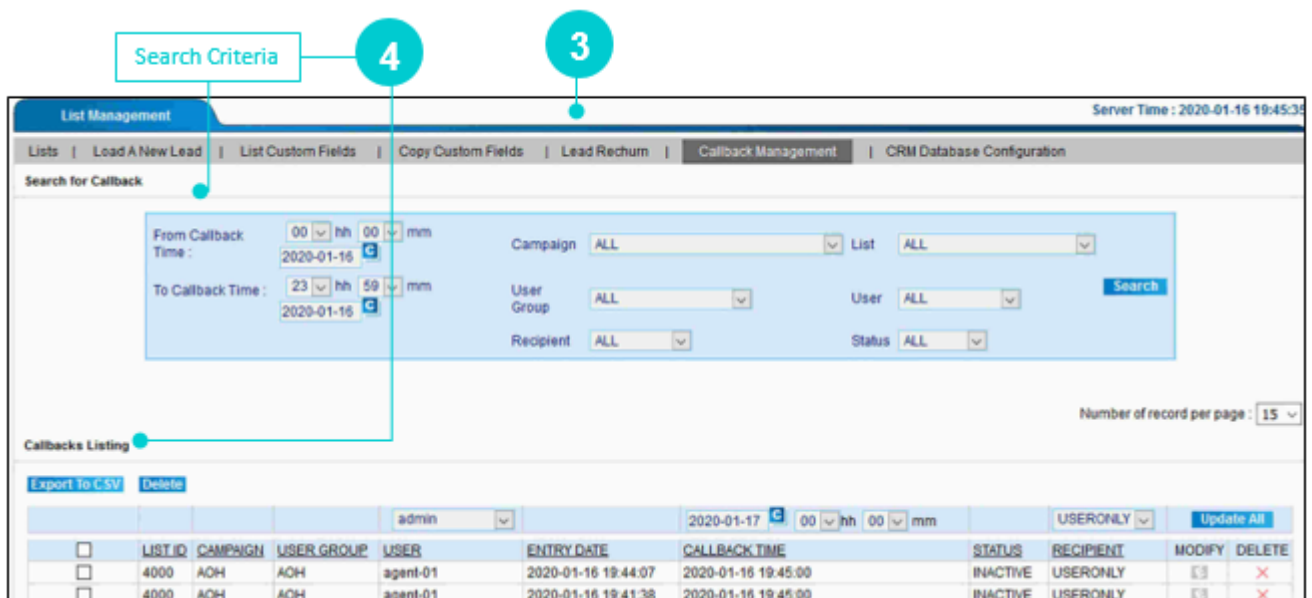


Figure 88 Callback Request

5. Search the Callback Requests by using the search criteria, such as From Callback Time, To Callback Time, Campaign, User Group, Recipient, List, User and Status.
6. Click **Search**.
7. System returns Callback Requests details that contain the search term.
8. To get a list of all Callback Requests details, click **Search**.

5.6.2 Transferring the Callback Requests

To Transfer the Callback Requests:

1. Apply the search filter.
2. Select an agent to which you want to transfer the Callback Requests. For example, suppose you want to transfer the callback request from agent_01 to agent_02, then select agent_02 of the same campaign.
3. Select the schedule of callback requests to transfer.
4. You can transfer Callback Requests any one of the following:
 - USERONLY – When agent has assigned the callback to itself.
 - ANYONE – When the callback request is transferred from agent to another agent in the same campaign.
5. Click **Update All**.

	LIST ID	CAMPAIGN	USER GROUP	USER	ENTRY DATE	CALLBACK TIME	STATUS	RECIPIENT	MODIFY	DELETE
<input type="checkbox"/>	4000	AOH	AOH	agent-01	2020-01-16 19:44:07	2020-01-16 19:45:00	INACTIVE	USERONLY		
<input type="checkbox"/>	4000	AOH	AOH	agent-01	2020-01-16 19:41:38	2020-01-16 19:45:00	INACTIVE	USERONLY		

Figure 89 Callbacks Listing

5.6.3 Updating, Searching, and Deleting Callback Requests

5.6.3.1 Updating Callback Requests

To update:

1. Click **Edit** corresponding to the Callback Requests on Callback Requests Listing.
2. Modify details as required.
3. Click Submit.

5.6.4 Deleting Callback Requests

Neox provides two ways of deleting the Callback Requests:

- Single Callback Request deletion – Enables deleting a single Callback Request configuration.
 1. Select a Callback Request.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Callback Requests deletion - Enables deleting multiple Callback Requests.
 1. To delete multiple Callback Requests, select the Callback Requests OR to delete all Callback Requests, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

5.6.5 Exporting Callback Requests to CSV

To export Callback Requests to CSV:

1. Click **Export** to CSV.
2. Save file for future use.

The file contains page-wise data as displayed on the screen.

5.7 CRM Database Configuration

This section provides information about CRM Database Configuration that enables in configuring CRM Database Properties to configure CRM Database.

To configure CRM Database, do the following:

- *Configuring CRM Database*
- *Updating, Searching, and Deleting CRM Database*

5.7.1 Configuring CRM Database

To configure Lead Rechurn:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **List Management**, and then click **CRM Database Configuration**.

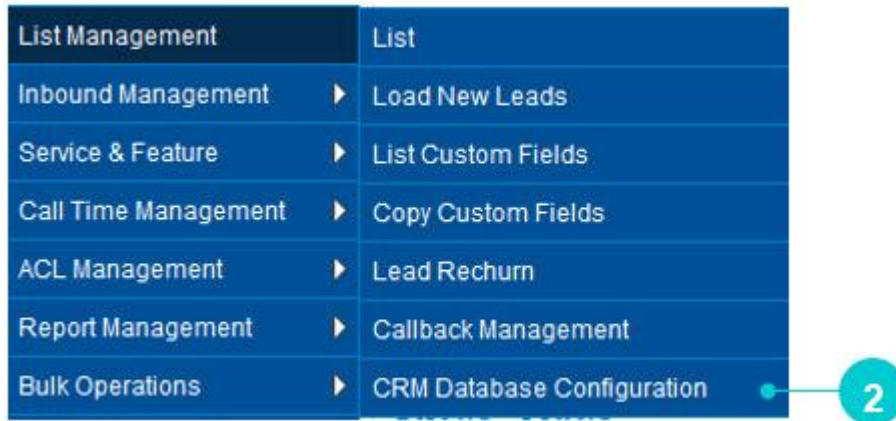


Figure 90 CRM Database Configuration menu

3. CRM Database Configuration screen appears.
4. The screen is bifurcated into two sections; Search for CRM Database and CRM Database Listing.
 - Search for CRM Database - Provides a way to search CRM Database details using search criteria.
 - CRM Database Listing- Provides a list view of existing CRM Database created in the system, including the details such as CRM Name, Database Type, and IP Address/Domain Name. Additionally, you can create, update, search, and delete CRM Database Configuration and view details of a CRM Database by clicking its CRM.
5. To create a new CRM, click **Create**.

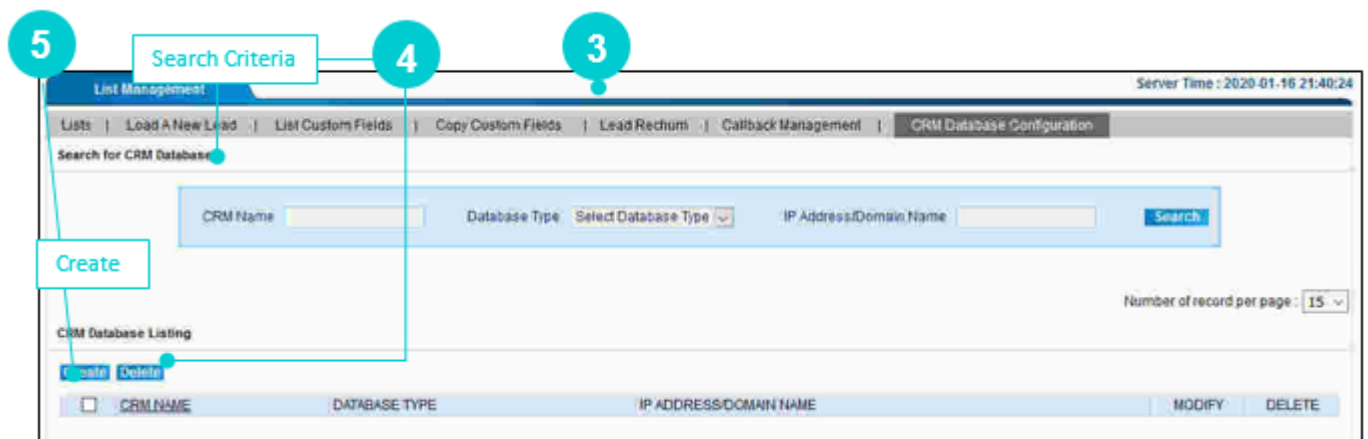


Figure 91 Create CRM Database Configuration

6. Add a New CRM Data Configuration screen appears. Enter the parameters as given in the table.

The screenshot shows a web form titled "Add a New CRM Data Configuration". Under the heading "CRM Database Configuration Details", there are several input fields:

- CRM Name*: A text box containing "Sales".
- Database Type*: A dropdown menu with "ORACLE" selected.
- IP Address/Domain Name*: A text box containing "11.111.11.111".
- Username*: A text box containing "sales_admin".
- Password: A text box with masked characters (dots). To its right is a checkbox labeled "Show Password".
- Database Name*: A text box containing "Sales".

 At the bottom of the form is a blue "SUBMIT" button. A blue circle with the number "6" is positioned above the form, and another blue circle with the number "7" is positioned below the "SUBMIT" button.

Figure 92 Create CRM Database Configuration

Table 23 Create CRM Database Configuration Parameters

Parameters	Description
CRM Name*	Enter the name of the CRM.
Database Type*	Select Database Type, such as MYSQL, MSSQL or ORACLE.
IP Address/Domain Name	Enter the IP Address or Domain Name to establish the connection.
Username*	Enter the username to connect to the database.
Password	Enter the password to connect to the database.
Database Name*	Enter the database name.

7. Once done, click **Submit**.

5.7.2 Updating, Searching, and Deleting CRM Database

5.7.2.1 Updating CRM Database Configuration

To update:

1. Click **Edit** corresponding to the CRM Database Configuration.
2. Modify CRM Database Configuration screen appears.
3. Modify details as required. You cannot modify the CRM Name.
4. Click **Submit** to save the details.
5. If you want to delete the CRM Database Configuration, click **Delete**.

5.7.2.2 Searching CRM Database Configuration

To search using filter:

1. Enter CRM Name or select Database Type or enter IP Address/Domain Name.
2. Click **Search**.
3. System returns CRM Database Configuration details that contain the search term.
4. To get a list of all CRM Database Configuration details, click **Search**.

5.7.2.3 Deleting CRM Database Configurations

Neox provides two ways of deleting the CRM Database Configurations:

- Single CRM Database Configuration deletion – Enables deleting a single CRM Database Configuration.
 1. Select a CRM Database Configuration.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple CRM Database Configurations deletion - Enables deleting multiple CRM Database Configurations.
 1. To delete multiple CRM Database Configurations, select the CRM Database Configurations OR to delete all CRM Database Configurations, select the header column.
 2. Click **Delete**.
 3. Click **Ok** to confirm.

6. Inbound Management

This chapter provides information of Inbound Management that enables the administrator to control the inbound calls received by the customer to the agent, configure DID number to receive inbound calls, and customized IVR to provide quick resolution and better customer experience. It is a logical entity in which users can login and make themselves available to receive inbound calls pertaining to that in-groups. When a customer calls, then an IVR is played to the customer seeking an input. After the customer gives an input, the call is routed to the destination.

Contents:

- *In-groups*
- *DIDs*
- *Call Menus*

6.1 In-groups

This section provides details about In-groups configuration that provides flexibility to the administrator to manage inbound calls using various configurations. The inbound calls come when a customer is seeking support, inbound sales, customer service and so on. In In-group, you can configure how the call is distributed among agents, play prompt files for the inbound calls, and do various configurations while call is on wait, play advertisement and so on. In-group helps in accommodating the inbound calls for better customer experience. The In-group created here is bind with Campaign, User Group, and User.

To manage In-groups, do the following steps:

- *Creating In-groups*
- *Updating In-groups*
- *Updating, Searching, and Deleting In-groups*

6.1.1 Creating In-groups

To create an In-group:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Inbound Management**, and then click **In-groups**.

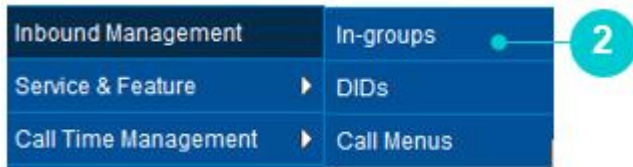


Figure 93 In-groups menu

3. In-groups screen appears.
4. The screen is bifurcated into two sections; Search for Inbound Group and Inbound Group Listing.
 - Search for Inbound Group - Provides a way to search Inbound Group details using search criteria.
 - Inbound Group Listing - Provides a list view of existing Inbound Groups created in the system, including the details such as In-group, Name, Time, Color, and Active/Inactive status, URL Config, SMS Config, Email Config and CRM Notify Config. Additionally, you can create, update, search, and delete Inbound Group and view details of an Inbound Group by clicking its In-group name.
5. To create a new Inbound Group, click **Create**.

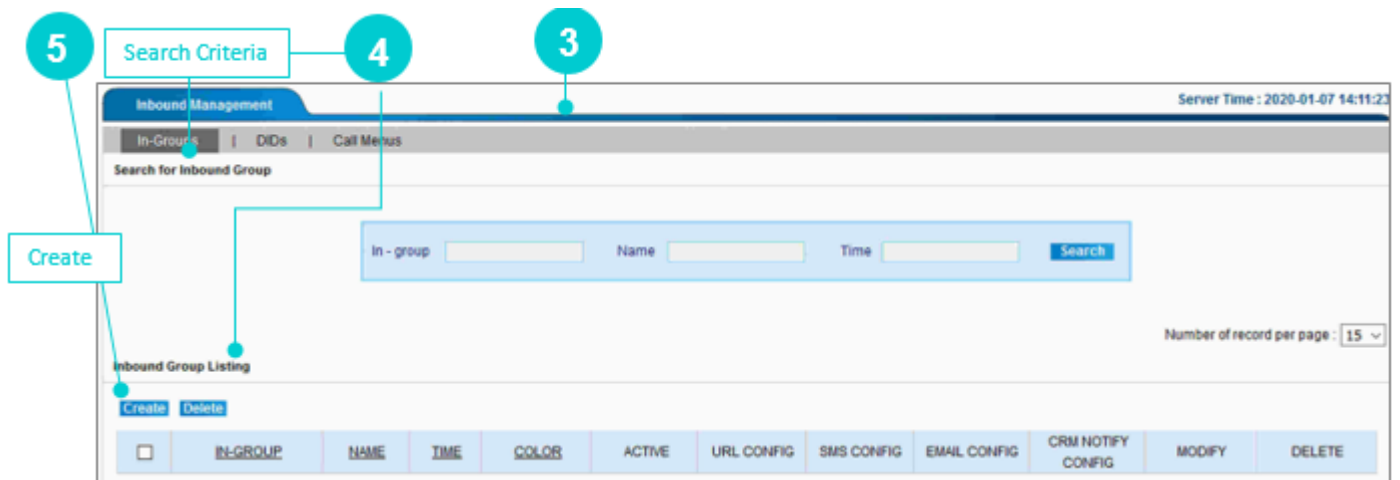


Figure 94 Create Inbound Group

6. Add a New Inbound Group screen appears.

To create a new Inbound Group, enter the parameters as given in the table.




The screenshot shows the 'Add a New Inbound Group' configuration page. The form includes the following sections and fields:

- Group Detail:** Group ID (text input), Group Name (text input), Group Color (FF0000), Active (checked), Sticky Agent (unchecked), Next Agent Call (Random), Script (NONE), List ID (0), Force Transfer To Ingroup (unchecked).
- Call Route on Hangup:** Customer Feedback Menu (No Customer Feedback Menu Found).
- Prompt Files:** Play Welcome Message (ALWAYS), Welcome Message Filename (Browse...), MOH Message Filename (Browse...).
- Wait Option:** Continuous Play (unchecked), Wait Enable (unchecked), Wait Time Option Seconds (text input), Wait Timer 1 Action (HANGUP_WITH_MESSAGE), Wait Time Option Message Filename (Browse...), Wait2 Enable (unchecked), Wait2 Time Option Seconds (Create), Wait Timer 2 Action (HANGUP_WITH_MESSAGE), Wait2 Time Option Message Filename (Browse...).
- Advertise Detail:** Adv Prompt Interval (text input), Adv1 Enable (unchecked), Adv1 Prompt Filename (Browse...), Adv2 Enable (unchecked), Adv2 Prompt Filename (Browse...), Adv3 Enable (unchecked), Adv3 Prompt Filename (Browse...).
- Ring Time Out:** Agent Ring Timeout Value (0), Agent Ring Timeout Action (NONE).
- Use DNC Option:** Use DNC (N).

A 'SUBMIT' button is located at the bottom left of the form.

Figure 95 Create Inbound Group

Table 24 Create Inbound parameters

Parameters	Description
Group Detail	
Group ID *	Enter a unique id or short name of the inbound group, it is not editable after initial submission.
	 Note Do not use special characters in in-group id.
Group Name *	Enter a description of the group.
	 Note <ul style="list-style-type: none"> It must be between 2 and 30 characters in length. Do not use special characters in group name.
Group Color	This is the color that displays in the Neox Dial Center client app when a call comes in on this group. The default value is FF0000.
	 Note It must be between 2 and 7 characters long. If this is a hex color definition, you must remember to put a # at the beginning of the string.
Active	Activate this in-group to display in the in the selection box of the agent's portal.
Sticky Agent	<p>You can allow an agent to be a sticky agent by enabling this inbound group. This feature binds an agent with a customer. So, when the same customer calls again, then the system automatically directs the call to the agent with whom the customer has interacted before.</p> <p>If that agent is busy on another call or not logged in, then the call is assigned to the other agent from the same in-group based on the algorithm. In this case, the customer's call is bind with the current agent. So, next time, when the same customer calls, then the call is directed to the current agent on availability and so on.</p>
Next Agent Call	<p>This determines which agent receives the next call that is available. The options available are:</p> <ul style="list-style-type: none"> Random - Orders by the random agent value in the database. Round Robin – Orders by the last time an agent was sent a call. This results in agents receiving the same number of calls. Number of Calls – Orders by the number of calls received by an agent for that specific inbound group. Least calls first.

Parameters	Description
	<ul style="list-style-type: none"> • Most Idle – Orders by the amount of time agent has been actively waiting for a call. • Inbound Group Rank – Orders by the rank given to the agent for the specific inbound group. Highest to Lowest.
Script	Allows to select a script that appears on the agent's screen for this campaign while dialing a call. Select <i>NONE</i> to show no script for this campaign.
List ID	Select a <i>List ID</i> to allow only the specified leads incoming call to this Inbound group.
Force Transfer To Ingroup	Allows transferring the inbound call to the Inbound group and getting for the next call. If this option is not selected, then the Agent will not get free for the next call until the agent is not assigned from transferred in-group.
Call Route on Hangup	
Customer Feedback Menu	If you want to redirect an inbound call to the feedback menu, then select a Customer Feedback Menu Option, which is configured from <i>Call Menu>>Customer Feedback</i> .
Prompt Files	
Play Welcome Message	Allows playing a welcome message to the caller. The options are: <ul style="list-style-type: none"> • ALWAYS – Always plays a welcome message for the inbound call. • NEVER - Never plays welcome message for the inbound call. • IF_WAIT_ONLY – Plays welcome message only when the inbound call is kept on waiting or call cannot be connected to the agent.
Welcome Message Filename	Upload a prompt file (.wav or .mp3) to play when an inbound call comes in.
MOH Message Filename	Upload a prompt file (.wav or .mp3) to play when an inbound call is kept on hold or wait.
Wait Option	
Continuous Play	Select this option to play the prompt file continuously until the Drop Timer reaches is configured value, when an inbound call is kept on hold or wait.

Parameters	Description
Wait Enable	If you want to provide additional options while the call is on wait, then enable this option. Enabling this option also enabled "Wait Timer 1 Action".
Wait Time Option Seconds	Enter time in seconds, after which the customer can have option as per action configured.
Wait Timer 1 Action	<p>This field is enabled when the "Wait Enable" field is selected. Enabling this field allows configuring additional options for the calls on wait after the specified "Wait Time Option Seconds". The options are:</p> <ul style="list-style-type: none"> • HANGUP_WITH_MESSAGE – Hang up the call and a message is played. • HANGUP – Hang up the call when the timer is triggered. • MESSAGE – Upload a prompt file to play, after the wait time is over. • EXTENSION – Enter an extension number to route the call to that number, after the wait time is over. • IN_GROUP – Select an In-Group to transfer the call on wait, after the wait time is over. • CALLMENU - Select a <i>Call Menu</i> to transfer the call on wait, after the wait time is over. Call Menu is configured from <i>Inbound Management>>Call Menus</i>. • VOICEMAIL – Send the call to the defined voicemail box, after the wait time is over.
Wait2 Enable	This option is enabled only when the Continuous Play option is disabled. Selecting this option allows you to perform the configuration for the call on wait, after the <i>Wait Enable</i> condition is fulfilled.
Wait2 Time Option Seconds	Same as Wait Time Option Seconds
Wait Timer 2 Action	Same as Wait Timer 1 Action
Advertise Detail	
Adv Prompt Interval	Allows playing advertisement prompt when the call is not connected to an Agent or the call is on hold. Advertisement prompt is played after every "configurable seconds" as mentioned in this field.
Adv1/Ad2/Ad3 Enable	Enabling and disabling the advertisement prompt.

Parameters	Description
Adv1/Ad2/Ad3 Prompt Filename	Upload advertisement prompt to be played in a sequence.
Ring Time Out	
Agent Ring Timeout Value	Enter the number of the seconds till the time agent phone rings, after that ring is timed out.
Agent Ring Timeout Action	<p>This is used when the agent is not using the Neox Dial Center. Define the action after the ring is timed out and agent has not performed any action. The options are:</p> <ul style="list-style-type: none"> • Logout – Agent is logged out from the system. • Pause – Agent goes in Pause mode. <p>You can allow the agent to log in permanently through <i>User Management>>Users>> Modify a user>>Agent Configuration>> Allow Permanent Login.</i></p>
Use DNC Option	
Use DNC	The lead whose call status is DNC (Do Not Call) is not dialed, if the value is set to Y, and if the value is set to N, then the lead is dialed.

7. Once done, click **Submit**.
8. A confirmation message appears. Click **Ok**.

Note

It is recommended to configure the features in the given sequence.

1. After Hours Action
 2. Max Calls - Per Caller Per Day
 3. Queue Overflow
 4. No Agents No Queueing
-

6.1.2 Updating In-groups

To update:

1. Click **Edit** corresponding to the In-group.
2. Modify an Inbound Group screen appears.
3. Modify details as required.
4. When you modify inbound groups, then you can perform additional configuration, as given in the table.

Inbound Management

In-Groups | DIDs | Call Menus

Modify an Inbound Group 4

Group Detail

Group ID	support	Next Agent Call	Random
Group Name *	Support	Queue Priority	0 - Even
Group Color *	FF0000	Script	.
Active	<input checked="" type="checkbox"/> Enable	List ID	0
In-Group Recording Override	DISABLED	Force Transfer To Ingroup	<input type="checkbox"/> Enable
Sticky Agent	<input type="checkbox"/> Enable	Reset Callback On	Connect

Call Route on Hangup

Customer Feedback Menu	None
------------------------	------

Call Route Option

Drop Call Seconds	300
Drop Action	HANGUP_WITH_MESSAGE
Drop Message Filename	Choose File No file chosen
Call Time	24hours - default 24 hours ct
After Hours Action	HANGUP_WITH_MESSAGE
After Hours Message Filename	Choose File No file chosen vm-goodbye
No Agents No Queuing	<input type="checkbox"/> Enable
No Agent No Queue Action	HANGUP_WITH_MESSAGE
Audio File	Choose File No file chosen nbdy-avail-to-take-call/vm-goodbye

Max Calls - Per Caller Per Day

Enable	<input type="checkbox"/>
Calls To Consider	<input type="radio"/> All Call <input checked="" type="radio"/> Connected With Agent
Max Calls	1-99
Action On Limit Exceed	Select Limit Exceed Action

Queue Overflow

Enable

Overflow Indicator

Max Waiting Calls

Overflow Action

Prompt Files

Play Welcome Message

Welcome Message Filename No file chosen
support.wav ✗
(Please upload file with .wav or .mp3 extension)

MOH Message Filename No file chosen
(Please upload file with .wav or .mp3 extension)

Wait Option

Continuous Play Enable

Wait Enable Enable

Wait Time Option Seconds

Wait Timer 1 Action

Wait2 Enable Enable

Wait2 Time Option Seconds

Wait Timer 2 Action

Advertise Detail

Adv Prompt Interval

Adv1 Enable Enable

Adv1 Prompt Filename No file chosen
(Please upload file with .wav or .mp3 extension)

Adv2 Enable Enable

Adv2 Prompt Filename No file chosen
(Please upload file with .wav or .mp3 extension)

Adv3 Enable Enable

Adv3 Prompt Filename No file chosen
(Please upload file with .wav or .mp3 extension)

Ring Time Out

Agent Ring Timeout Value Agent Ring Timeout Action

Use DNC Option

Use DNC

Play Place And Play Wait In Line

Play Place and Wait Selection Play Place In Line Play Wait In Line Both None

URL Configuration

URL Popup Enable

SMS Configuration

SMS API Enable

Email Configuration

Email API Enable

CRM Notifty Configuration

CRM Notifty API Enable

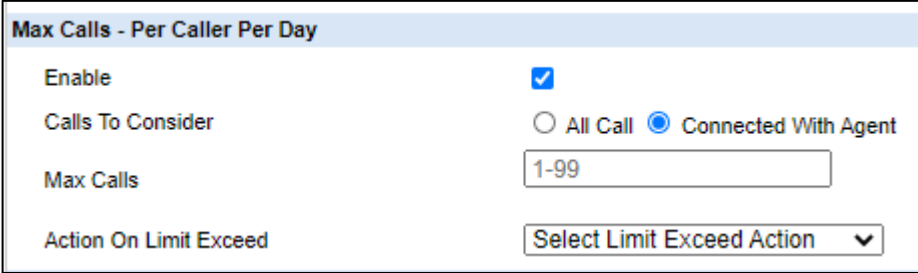
4

Figure 96 Modify In-group

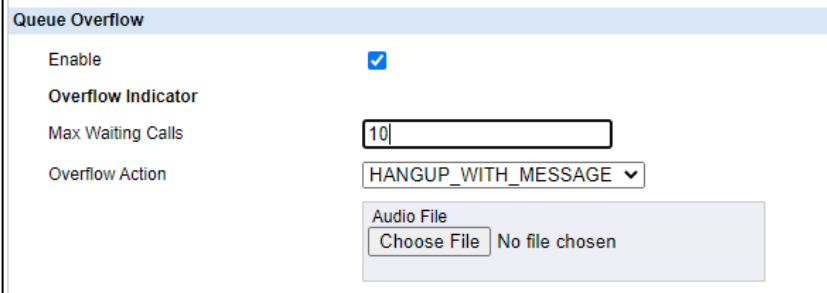
Table 25 Modify In-group parameters

Parameters	Description
Group Detail	
In-Group Recording Override	<p>Overrides recording settings, if disabled. Enabling this option allows recording In-group and Campaign calls. The options are:</p> <ul style="list-style-type: none"> Disabled Never On Demand All Calls

Parameters	Description
	<ul style="list-style-type: none"> All Force
Queue Priority	Define priority of the inbound call in queue.
Call Route Option	
Drop Call Seconds	<p>Enter the number of seconds after which the customer's call in a queue is automatically disconnected.</p> <p>For example, if Drop Call Seconds is 40 and a customer's call is in a queue for more than 40 seconds, then the call is dropped automatically by the system.</p>
Drop Action	<p>Select an action that defines what happens to a call when it has been waiting for longer than the set time in "Drop Call Seconds" field.</p> <p>The options are:</p> <ul style="list-style-type: none"> HANGUP_WITH_MESSAGE - Hangs up the call and plays an IVR that is uploaded as a Drop Message in .wav or .mp3 format. HANGUP - Hangs up the call. EXTENSION - Routes the calls to the specified extension. IN_GROUP - Routes the call to the Inbound Group. CALL MENU - Routes the call to the Call Menu. VOICEMAIL - Sends the call to the voicemail box.
Call Time	Select a call to allow incoming calls only at the specified time.
After Hours Action	<p>Define action to be performed when the call has been waiting for longer than the set <i>Drop Call Seconds</i>. The options are:</p> <ul style="list-style-type: none"> HANGUP_WITH_MESSAGE - Hangs up the call and plays an IVR that is uploaded as a Drop Message in .wav or .mp3 format. HANGUP - Hangs up the call. EXTENSION - Routes the calls to the specified extension. IN_GROUP - Routes the call to the Inbound Group. CALL MENU - Routes the call to the Call Menu. VOICEMAIL - Sends the call to the voicemail box.
No Agents No Queueing	When an agent is not logged-in ingroup, then a specific action can be performed. The action is described in the next field.
No Agent No Queue Action	Select action to be performed when an agent is not available to received inbound call.

Parameters	Description
Play Place And Play Wait In Line	<p>Allows configuring actions while the customer’s call is in queue. The options are:</p> <ul style="list-style-type: none"> • Play Place in Line – Plays the position of the customer in queue while waiting for the call to be answered by the agent. • Play Wait in Line – Plays an approximate waiting time to the customer while waiting for the call to be answered by the agent. • Both – Plays both the position of the customer in queue and an approximate waiting time for the call to be answered by the agent. • None – Disables this functionality.
<p>Max Calls – Per Caller Per Day</p> 	
Enable	Select the checkbox to enable the Max Calls limit feature.
Calls to Consider	<p>This functionality specifies when to increment the call counter of the caller. It has two options:</p> <ul style="list-style-type: none"> • All Calls – Increments caller’s call count irrespective of its communication with the agent. • Connected With Agent – Increments caller’s call count only if the caller speaks with the agent, thereby giving a fair chance to the caller. This option is selected by default.
Max Calls	<ul style="list-style-type: none"> • Define the maximum number of calls from a particular contact number. • The range of maximum calls should be between 1 to 99. Adding 0 or 100 and above disables the <i>Action on Limit Exceed</i> option.
Action on Limit Exceed	<p>If the caller’s call limit exceeds, this feature supports the following call routing options:</p> <ul style="list-style-type: none"> • HANGUP WITH MESSAGE • HANGUP

Parameters	Description
	<ul style="list-style-type: none"> • EXTENSION • IN_GROUP • CALL MENU • VOICE MAIL <ol style="list-style-type: none"> 1. HANG UP WITH MESSAGE <ul style="list-style-type: none"> • This option sends an audio message to the caller. After the end of this message, the call is disconnected. • Click the Choose File option and upload the audio message file. Only .wav and .mp3 files are supported. 2. HANGUP <ul style="list-style-type: none"> • This option disconnects the call. 3. EXTENSION <ul style="list-style-type: none"> • The call is routed to the extension number provided in the configuration. 4. IN_GROUP <ul style="list-style-type: none"> • All calls are redirected to another In-Group queue. • If you select the existing In-Group, then the call gets disconnected. Select a different In-Group from the available options. 5. CALL MENU <ul style="list-style-type: none"> • On Hang-up, all calls are sent to the selected IVR. • If you have not created Call Menus, then the selection list will be empty. 6. VOICE MAIL <ul style="list-style-type: none"> • Selecting this option allows a caller to drop a voice mail/message that gets recorded.

Parameters	Description
	<ul style="list-style-type: none"> The call is routed to the Voice mail room number provided in the configuration.
<p>If any call gets disconnected due to Max Call limit status, then the disposition status will be <i>LMTEXD (Call Limit Exceeded)</i>.</p>	
<p>Queue Overflow</p> 	
Enable	Select the checkbox to enable the Queue configuration.
Overflow Indicator - Max Waiting Calls	<ul style="list-style-type: none"> Define the maximum number of waiting calls for a particular queue. The range of waiting calls should be between 1 to 999. Adding 0 or 1000 and above will disable the Overflow action.
Overflow Indicator – Overflow Action	<p>This feature supports following call routing options:</p> <ul style="list-style-type: none"> HANGUP WITH MESSAGE HANGUP CALL MENU IN_GROUP <ol style="list-style-type: none"> HANG UP WITH MESSAGE <ul style="list-style-type: none"> This option sends an audio message to the caller. After the end of this message, the call is disconnected. Click the Choose File option and upload the audio message file. Only .wav and .mp3 files are supported. HANGUP <ul style="list-style-type: none"> All waiting calls that cannot stay in the queue are disconnected. IN_GROUP

Parameters	Description
	<ul style="list-style-type: none"> All waiting calls that cannot stay in the queue are redirected to another in-group queue. If you select the existing in-group, then the waiting call gets disconnected. Select a different in-group from the available options. <p>4. CALL MENU</p> <ul style="list-style-type: none"> On Hang-up, all waiting calls that cannot stay in the queue are sent to the selected IVR. If you have not created Call Menus, then the selection list will be empty.
If any call gets disconnected due to Queue Overflow status, then the disposition status will be <i>QOVRFL</i> .	
<p>Play Place In Line - Play place and wait time enables administrator to notify the customers whose calls are in queue, their position in the queue, and the time they have to wait in the queue.</p> <p>This feature ensures that the customers stay in the queue and do not disconnect.</p>	
Play Place in Line Interval	Define the interval after which the position prompt should be repeated followed by MOH.
Min	<ul style="list-style-type: none"> Active - Activates an action. Play Place/Wait In Line Min Place – Allows playing the position/waiting time of the customer in queue when the call reaches the defined minimum place/waiting time. Play Place/Wait In Line Min Place Action - Defines an action to be performed when the call reaches the defined minimum place/waiting time.
Max	<ul style="list-style-type: none"> Active - Activates an action. Play Place/Wait In Line Max Place - Allows playing the position of the customer/waiting time in queue when the call reaches the maximum place/waiting time. Play Place/Wait In Line Max Place Action - Define an action to be performed when the call reaches the maximum place/waiting time.
Play Place/Wait In Between Place Action	<p>Allows playing the position/waiting time of the customer in between the Min and Max value. This field has three actions:</p> <ul style="list-style-type: none"> None - No action is configured.

Parameters	Description
	<ul style="list-style-type: none"> Call Menu – Select a call menu to play. For example, if the user has reached the max position, then the call can be redirected to the call menu where the promotional offers can be played.
Play Place/Wait in Line Pre-prompt	Upload a prompt file to play before the position/waiting time of the customer in queue is played.
Play Place/Wait in Line Post-prompt	Upload a prompt file to play after the position/waiting time of the customer in queue is played.
Both	
Set Priority	Sets priority to play “Position” or “Waiting time” first to the customer followed by next value.
Play Place and Wait in Line Interval	Defines the interval after which the position/waiting time prompt should be repeated followed by MOH.
URL Popup	Provides notification of a URL.
SMS API	Allows configuring SMS API.
Email API	Allows configuring Email API.
CRM Notify API	Allows configuring CRM Notification API.

- Once done, click **Submit**.
- To delete, click **Delete**.

6.1.3 Searching, and Deleting In-groups

6.1.3.1 Searching In-groups

To search using filter:

1. Enter In-group/Name/Time.
2. Click **Search**.
3. System returns In-groups that contain the search term.
4. To get a list of all In-groups details, click **Search**.

6.1.3.2 Deleting In-groups

Neox provides two ways of deleting the In-groups:

- Single In-group deletion – Enables deleting a single In-group.
 1. Select an In-group.
 2. Click Delete or Delete icon.
 3. Click **Ok** to confirm.
- Multiple In-groups deletion - Enables deleting multiple In-groups.
 1. To delete multiple In-groups, select the In-groups OR to delete all In-groups, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

6.2 DID

This section provides details about DID that enables the administrator to map the phone numbers provided by a PSTN carrier (For example, BSNL) to the multi-level IVR or in-groups for customers. DID helps in landing customer's calls in DC.

To manage DID, do the following steps:

- *Creating DID*
- *Updating, Searching, and Deleting DID*

6.2.1 Creating DID

To create a DID:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Inbound Management**, and then click **DIDs**.



Figure 97 DID menu

3. DID screen appears.
4. The screen is bifurcated into two sections; Search for Inbound DID and Inbound DID Listing.
 - Search for Inbound DID - Provides a way to search Inbound DID details using search criteria.
 - Inbound DID Listing - Provides a list view of existing Inbound DIDs created in the system, including the details such as DID Pattern, Pattern, Route Value, Welcome File, various configurations and so on. Additionally, you can create, update, search, and delete Inbound DID and view details of an Inbound DID by clicking its DID Pattern.
5. To create a new Inbound DID, click **Create**.

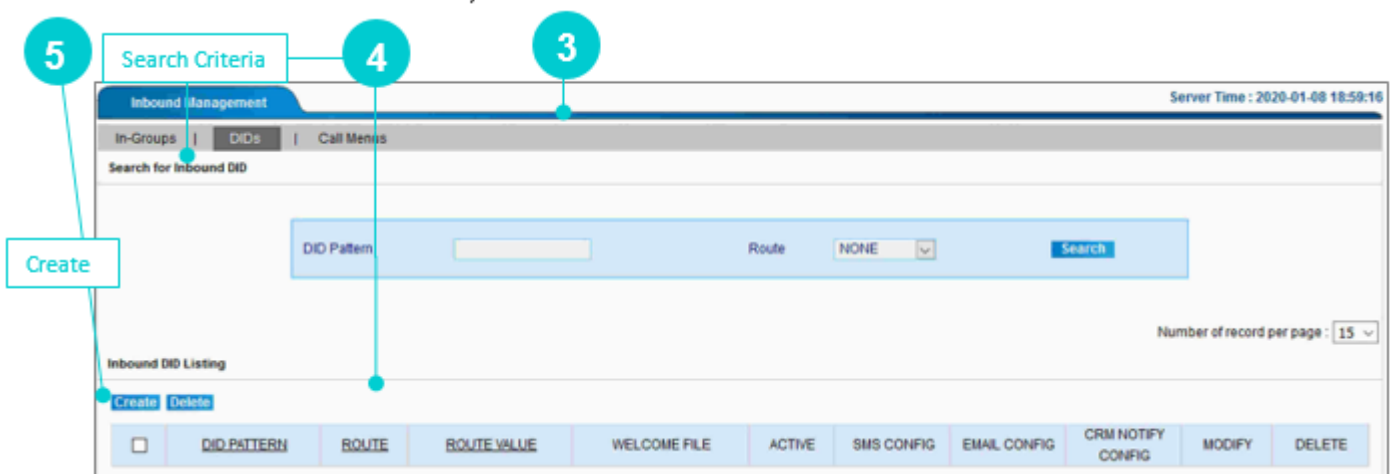


Figure 98 Create an Inbound DID

6. Add a New DID screen appears.

To create a new DID enter the parameters as given in the table.

Inbound Management

In-Groups | DIDs | Call Menus

Add a New DID

DID Detail

DID Extension * (no spaces or dashes)

Active Enable

DID Route

Prompt File

Prompt Welcome File 1 No file selected.
(Please upload file with .wav or .mp3 extension)

Prompt Welcome File 2 No file selected.
(Please upload file with .wav or .mp3 extension)

Prompt Welcome File 3 No file selected.
(Please upload file with .wav or .mp3 extension)

Prompt MOH File No file selected.
(Please upload file with .wav or .mp3 extension)

In-Group Detail

In-Group Call Handle Method

In-Group List ID *

In-Group Campaign ID

Incoming Lead Search

Lead Search

Alternate Number Enable

Use DNC Option

Use DNC

Timing Option

Use Time Option

SUBMIT

Figure 99 Create DID

Table 26 Create DID parameters

Parameters	Description
DID Detail	
DID Extension*	Enter the DID Extension number that is used for inbound calls. Callers dial this DID extension to connect to an agent.
Active	Activate DID Extension by selecting <i>Enable</i> .
DID Route	Select an option to route the inbound call. Any inbound call on the DID Extension can be routed to: <ul style="list-style-type: none"> Extension – Enter the extension number where the inbound call lands. For example, if 3001 is the Extension, and 1234567 is the DID Extension, then a call made on 1234567 lands on 3001 extension. In_group – Sends the inbound call to the selected in-group. Call Menu – Sends the inbound call to the selected Call Menu. VOICE_MESSAGE – When the caller calls on this DID, the voice message feature gets invoked. The default value for a voice message is 120 seconds, the minimum value is 20 seconds, and the maximum value is 600 seconds.
Prompt File	
Prompt Welcome File 1/File 2/File 3	Upload a prompt file to play when an inbound call comes in.
Prompt MOH File	Upload Music on Hold file to play when the customer's call is placed on hold.
In-Group Detail	
In-Group Call Handle Method	This option allows configuring routing of DID calls to the in-groups. Three types of in-groups options are available: <ul style="list-style-type: none"> CallerId Search In System - Search phone number by the caller id in the entire system. CallerId Search In DID List - Search phone number by the caller id in the specified list. CallerId Search In Campaign - Search phone number by the caller id in all of the lists that belong to a specified campaign.
In-Group List ID *	Select the List ID from where the leads are searched through and that leads are inserted into, if required. This option is applicable if the call handle method is "CallerID Search DID List".
In-Group Campaign ID	Select the Campaign ID that leads may be searched for in, if the call handle method is "CallerId Search InCampaign".

Parameters	Description																																																																																																				
Incoming Lead Search																																																																																																					
Lead Search	Select a way to search the leads, either using the Reference ID or Phone Number.																																																																																																				
Alternate Number	Select this option to search the leads using their phone number.																																																																																																				
Use DNC Option																																																																																																					
Use DNC	Select DNC to search the leads from the DNC list.																																																																																																				
Timing Option																																																																																																					
Use Time Option	<p>You can select this option to decide how the inbound calls can be dealt with after the call is received outside the specific time period.</p> <p>If you receive a call outside the specified time period, then you can route the call to the Call Menu, InGroup, DID, Enterprise Extension or Hangup the call.</p> <p>When you select a Route Option, then specify the required Route Value for each of the Route Option as follows:</p> <ul style="list-style-type: none"> • Call Menu/InGroup/DID – Select a specific Call Menu/InGroup/DID from the list of options under Route Value. • Enterprise Extension – Enter an extension number where the call is routed, if received outside the specified time. • Hangup – Upload a hang up .wav or .mp3 file to play while hanging up the call. 																																																																																																				
<div style="border: 1px solid black; padding: 5px;"> <p>Timing Option</p> <p><input checked="" type="checkbox"/> Use Time Option</p> <p>Clear All</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th><input type="checkbox"/></th> <th>Days</th> <th colspan="2">Start Time</th> <th colspan="2">Stop Time</th> <th colspan="2">Prompt File</th> <th>Route Option</th> <th>Route Value</th> </tr> <tr> <th></th> <th></th> <th>Hour</th> <th>Minute</th> <th>Hour</th> <th>Minute</th> <th></th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Default</td> <td>09</td> <td>00</td> <td>21</td> <td>00</td> <td>Browse...</td> <td>No file selected.</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Sunday</td> <td></td> <td></td> <td></td> <td></td> <td>Browse...</td> <td>No file selected.</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Monday</td> <td></td> <td></td> <td></td> <td></td> <td>Browse...</td> <td>No file selected.</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Tuesday</td> <td></td> <td></td> <td></td> <td></td> <td>Browse...</td> <td>No file selected.</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Wednesday</td> <td></td> <td></td> <td></td> <td></td> <td>Browse...</td> <td>No file selected.</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Thursday</td> <td></td> <td></td> <td></td> <td></td> <td>Browse...</td> <td>No file selected.</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Friday</td> <td></td> <td></td> <td></td> <td></td> <td>Browse...</td> <td>No file selected.</td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Saturday</td> <td></td> <td></td> <td></td> <td></td> <td>Browse...</td> <td>No file selected.</td> <td></td> <td></td> </tr> </tbody> </table> <p style="text-align: center;">SUBMIT</p> </div>		<input type="checkbox"/>	Days	Start Time		Stop Time		Prompt File		Route Option	Route Value			Hour	Minute	Hour	Minute					<input type="checkbox"/>	Default	09	00	21	00	Browse...	No file selected.			<input type="checkbox"/>	Sunday					Browse...	No file selected.			<input type="checkbox"/>	Monday					Browse...	No file selected.			<input type="checkbox"/>	Tuesday					Browse...	No file selected.			<input type="checkbox"/>	Wednesday					Browse...	No file selected.			<input type="checkbox"/>	Thursday					Browse...	No file selected.			<input type="checkbox"/>	Friday					Browse...	No file selected.			<input type="checkbox"/>	Saturday					Browse...	No file selected.		
<input type="checkbox"/>	Days	Start Time		Stop Time		Prompt File		Route Option	Route Value																																																																																												
		Hour	Minute	Hour	Minute																																																																																																
<input type="checkbox"/>	Default	09	00	21	00	Browse...	No file selected.																																																																																														
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<input type="checkbox"/>	Monday					Browse...	No file selected.																																																																																														
<input type="checkbox"/>	Tuesday					Browse...	No file selected.																																																																																														
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<input type="checkbox"/>	Saturday					Browse...	No file selected.																																																																																														

Figure 100 Timing Option

7. Once done, click **Submit**.
8. A confirmation message appears. Click **Ok**.

6.2.2 Updating, Searching, and Deleting DIDs

6.2.2.1 Updating DID

To update:

1. Click **Edit** corresponding to the DID on Inbound DID Listing.
2. Modify a DID screen appears.
3. Modify details as required.
4. Click **Submit**.
5. You may delete a DID by clicking **Delete**.

6.2.2.2 Searching DID

To search using filter:

1. Enter DID Pattern and/or select Route option.
2. Click **Search**.
3. System returns DID numbers that contain the search term.
4. To get a list of all DID numbers, click **Search**.

6.2.2.3 Deleting DIDs

Neox provides two ways of deleting the DIDs:

- Single DID deletion – Enables deleting a single DID.
 1. Select a DID.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple DIDs deletion - Enables deleting multiple DIDs.
 1. To delete multiple DIDs, select the DIDs OR to delete all DIDs, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

6.3 Call Menu

This section provides details about Call Menu that enables the administrator in configuring customized IVR to route the call to the destination. Call Menu includes designing call flows by uploading Prompt files, and creating Call Menus to route the calls based on the customer's action.

To manage Call Menu, do the following steps:

- *Creating Call Menu*
- *Updating, Searching, and Deleting Call Menu*

6.3.1 Creating Call Menu

To create a Call Menu:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Inbound Management**, and then click **Call Menus**.

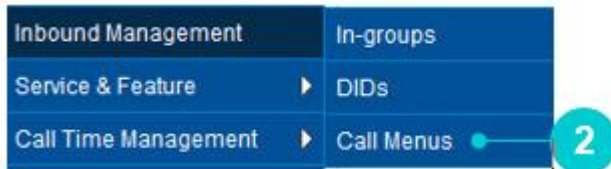


Figure 101 Call Menus menu

3. Call Menu screen appears.
4. The screen is bifurcated into two sections; Search for Call Menu and Call Menu Listing.
 - Search for Call Menu - Provides a way to search Call Menu details using search criteria.
 - Call Menu Listing - Provides a list view of existing Call Menus created in the system, including the details such as Menu Id, Name, Feedback Menu, Prompt, Time out and Options. Additionally, you can create, update, search, and delete Call Menus and view details of a Call Menu by clicking its Menu ID.
5. To create a new Call Menu, click **Create**.



Figure 102 Create a Call Menu

6. Add a New Call Menu screen appears.

To create a new Call Menu enter the parameters as given in the table.

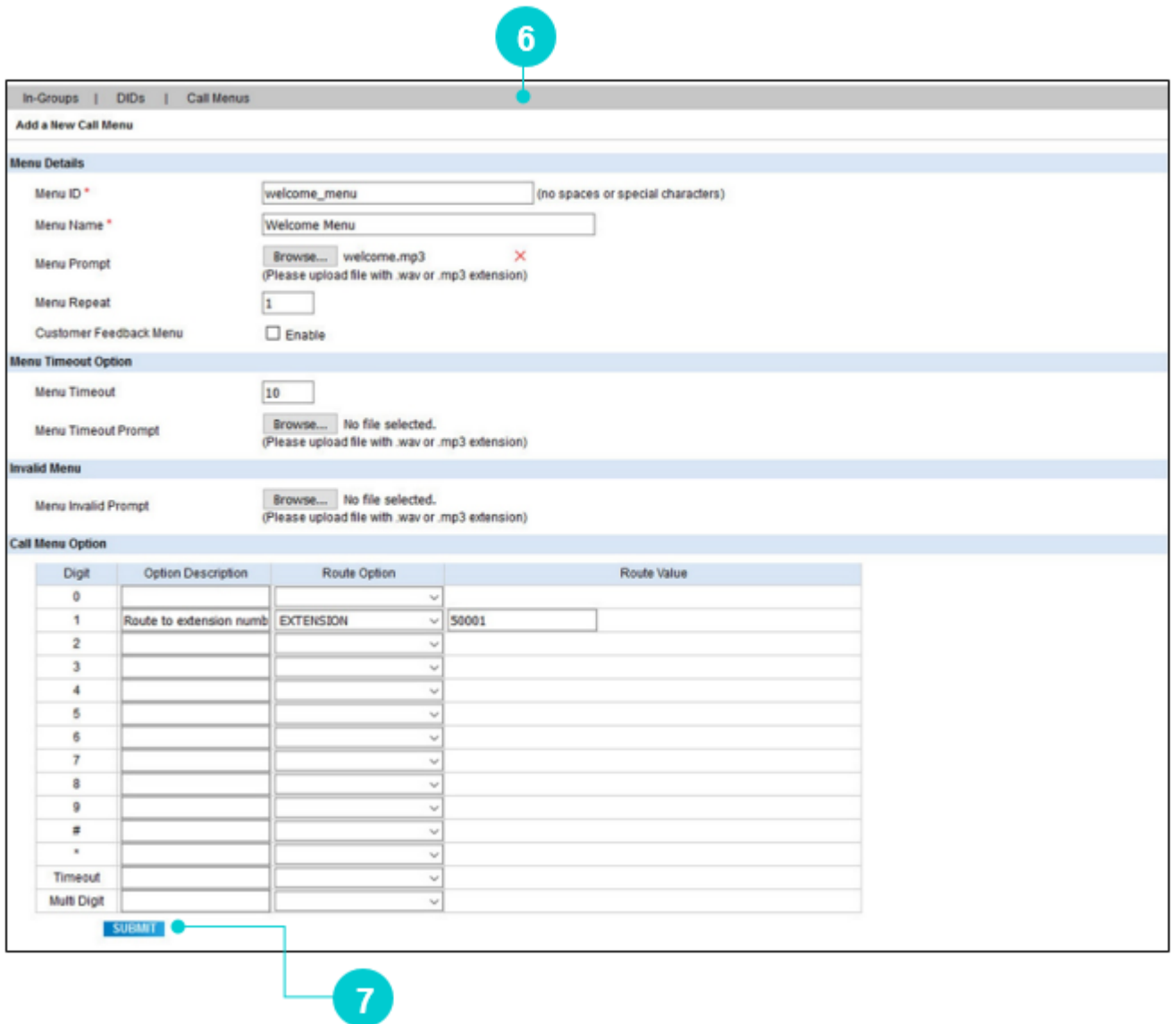


Figure 103 Create Call Menu

Table 27 Create Call Menu parameters

Parameters	Description
Menu Details	
Menu ID *	Enter a unique menu id for this call menu. This will also show up as the context that is used in the dial plan for this call menu.
Menu Name *	Enter a name of the call menu.
Menu Prompt	Upload a prompt file in .wav or .mp3 format that contains the audio prompt to play at the beginning of this menu.

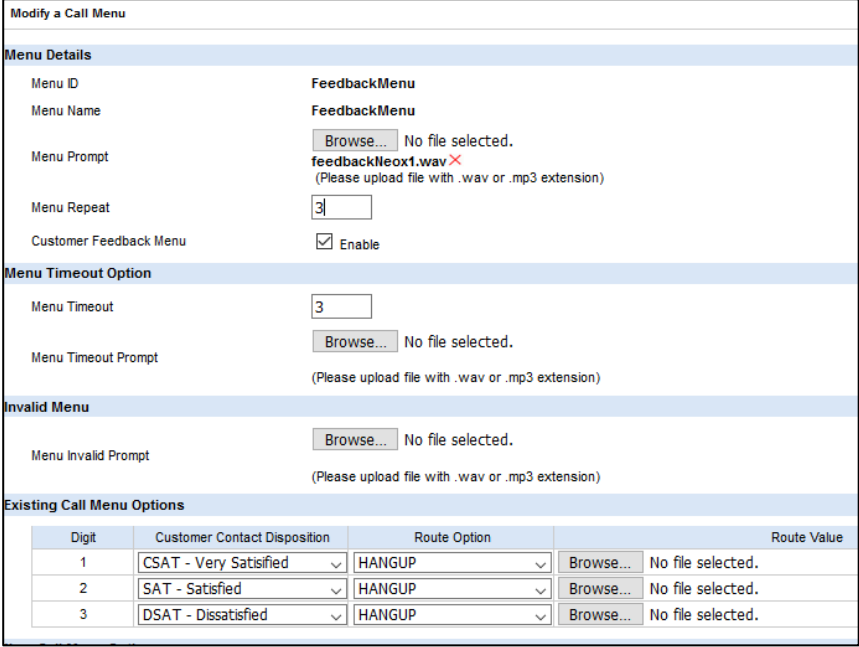
Parameters	Description																
Menu Repeat	<p>Enter the count that defines the number of times, the particular Call Menu is repeated until the caller has not entered any input. For example, if menu repeat is "3" for call menu and caller has not entered any input, then the IVR plays the prompt file of the call menu for 3 times.</p>																
Customer Feedback Menu	<p>Enable this option to route the customer to the feedback menu after the call ends. This enables the customer to give feedback about the product or service.</p> <p>Steps to configure Feedback Call Menu:</p> <ol style="list-style-type: none"> 1. Enable "Customer Contact" in the Status detail section of Disposition Status. For this, Refer <i>Service & Feature>>Disposition Status</i>. 2. Bind this disposition with the Campaign for which you want to enable the customer feedback. 3. Create a Call Menu for feedback. For this, select "Customer Feedback Menu". 4. Configure Call Menu Option: <ul style="list-style-type: none"> • Select Customer Contact Disposition. • Select Call Menu option to route the call. • Give Route Value based on Route Option.  <p>The screenshot shows the 'Modify a Call Menu' interface. Under 'Menu Details', Menu ID and Name are 'FeedbackMenu'. Menu Prompt is 'feedbackfileox1.wav' with a file upload button. Menu Repeat is '3'. 'Customer Feedback Menu' is checked. Under 'Menu Timeout Option', Menu Timeout is '3'. Under 'Invalid Menu', there is a 'Browse...' button. The 'Existing Call Menu Options' table is as follows:</p> <table border="1"> <thead> <tr> <th>Digit</th> <th>Customer Contact Disposition</th> <th>Route Option</th> <th>Route Value</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>CSAT - Very Satisfied</td> <td>HANGUP</td> <td>Browse... No file selected.</td> </tr> <tr> <td>2</td> <td>SAT - Satisfied</td> <td>HANGUP</td> <td>Browse... No file selected.</td> </tr> <tr> <td>3</td> <td>DSAT - Dissatisfied</td> <td>HANGUP</td> <td>Browse... No file selected.</td> </tr> </tbody> </table>	Digit	Customer Contact Disposition	Route Option	Route Value	1	CSAT - Very Satisfied	HANGUP	Browse... No file selected.	2	SAT - Satisfied	HANGUP	Browse... No file selected.	3	DSAT - Dissatisfied	HANGUP	Browse... No file selected.
Digit	Customer Contact Disposition	Route Option	Route Value														
1	CSAT - Very Satisfied	HANGUP	Browse... No file selected.														
2	SAT - Satisfied	HANGUP	Browse... No file selected.														
3	DSAT - Dissatisfied	HANGUP	Browse... No file selected.														
Menu Timeout Option																	
Menu Timeout	<p>Enter the timeout in seconds that the menu waits for the caller to enter in a DTMF choice. Setting this field to zero 0 means that there is no wait time after the prompt is played.</p>																

Figure 104 Feedback menu

Parameters	Description
Menu Timeout Prompt	Upload a prompt file to play when the timeout is reached.
Invalid Menu	
Menu Invalid Prompt	Upload a prompt file to play when a customer inputs an invalid option.
<p>Call Menu Option - This section allows you to create a Call Menu flow from this section. The flow includes routing calls based on the input provided by the Caller. The routing allows in routing the call to another call menu, ingroup, extension, continue, callback, hangup, voicemail, ask for extension, wait for operator, enterprise extension, and director.</p>	
Digit	This field is where you define the menu option, possible choices are: 0,1,2,3,4,5,6,7,8,9,*,#,Timeout, and Multi Digit (used in case multi digit input from the customer is required, such as Customer ID).
Option Description & Route Value	<p>Displays a list of routing options available to route the call after a Digit is selected by the callers.</p> <ul style="list-style-type: none"> • CALLMENU - Routes the call to another Call Menu already created in the system. • INGROUP - Routes the call to another Ingroup already created in the system. • EXTENSION – Enter the extension number on which the call is routed. • CONTINUE - The process is continued. • HANGUP – The Route Value can be the name of an audio file to play before hanging up the call. • CALLBACK – Allows the customer to request for callback. • HANGUP – Hangs up the customer’s call. You can also upload a prompt file to play while hanging up the call. • VOICEMAIL – Route the call to a voicemail. Enter the voicemail box number in the “Route Value”. This records the message for future operation. • ASKFOREXTENSION – IVR message is played to ask the customer to enter the extension number, where the call is routed. • WAITFOROPERATOR – Customer has to wait until the call is routed to the agent. • ENTERPRISE EXTENSION – Enter an extension where the customer’s call is routed automatically. • DIRECTOR - Call is routed to C5 director from Neox DC.\ • VOICEMESSAGE – It allows configuring Voice Message functionality. When the caller inputs a digit bind with this feature, the feature gets invoked.

Parameters	Description
	<ul style="list-style-type: none"><li data-bbox="660 286 1406 398">▪ The default value for a voice message is 120 seconds, the minimum value is 20 seconds, and the maximum value is 600 seconds.<li data-bbox="660 412 1437 488">▪ The administrator can listen to the voice messages from the Call CDR report and take appropriate action<li data-bbox="660 501 1382 533">▪ The disposition status for voice message is IVRMSG.

5. Once done, click **Submit**.
6. A confirmation message appears. Click **Ok**.

6.3.2 Updating, Searching, and Deleting Call Menus

6.3.2.1 Updating Call Menu

To update:

1. Click **Edit** corresponding to the Call Menu.
2. Modify a Call Menu screen appears.
3. Modify details as required.
4. Click **Submit**.

6.3.2.2 Searching Call Menu

To search using filter:

1. You can search the call menu using the filters, such as Menu ID, Name, Prompt, Timeout, and Option.
2. Click **Search**.
3. System returns Call Menus that contain the search term.
4. To get a list of all Call Menus, click **Search**.

6.3.2.3 Deleting Call Menu

Neox provides two ways of deleting the DIDs:

- Single Call Menu deletion – Enables deleting a single Call Menu.
 1. Select a Call Menu.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Call Menus deletion - Enables deleting multiple Call Menus.
 1. To delete multiple Call Menus, select the Call Menus OR to delete all Call Menus, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

After creating the Call Menu, you can attach this Call Menu to the DID. So, when a customer calls the DID, then the Call Menu is played.

7. Service & Feature

This chapter provides information of various Neox DC Services and Features. This module helps in configuring Scripts, DNC Number, Number Profile, Disposition Statuses, and Auth Token API.

Contents:

- *Scripts*
- *DNC Number*
- *Number Profile*
- *Disposition Status*
- *Auth Token API*

7.1 Scripts

This section provides details about Scripts that enables the administrator to create a script that is displayed on the Agent's screen. This script helps the Agent in handing a call, greeting a customer or initiating a call. Script contains the most used points while having conversation with the customer. The script is accessible to the agent and displayed on the screen.

For example,

Customer calls a DID number 2002002 and call lands on agent's extension number 1001. On receiving the call, agent clicks the script option on the screen. A well-written greeting and follow-up questions are written to guide the agent.

To manage Scripts, do the following steps:

- *Creating Scripts*
- *Updating, Searching, and Deleting Scripts*

7.1.1 Creating Scripts

To create a Script:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Service & Feature**, and then click **Scripts**.

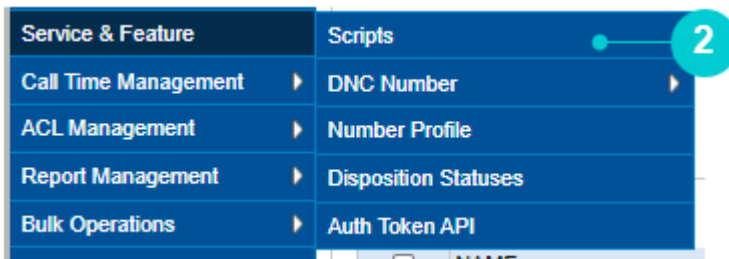


Figure 105 Script menu

3. Script screen appears.
4. The screen is bifurcated into two sections; Search for Script and Script Listing.
 - Search for Script - Provides a way to search Script details using search criteria.
 - Script Listing - Provides a list view of existing Scripts created in the system, including the details such as Script ID, Script Name, and Active/Inactive. Additionally, you can create, update, search, and delete Script and view details of a Script by clicking its Script ID.
5. To create a new Script, click **Create**.

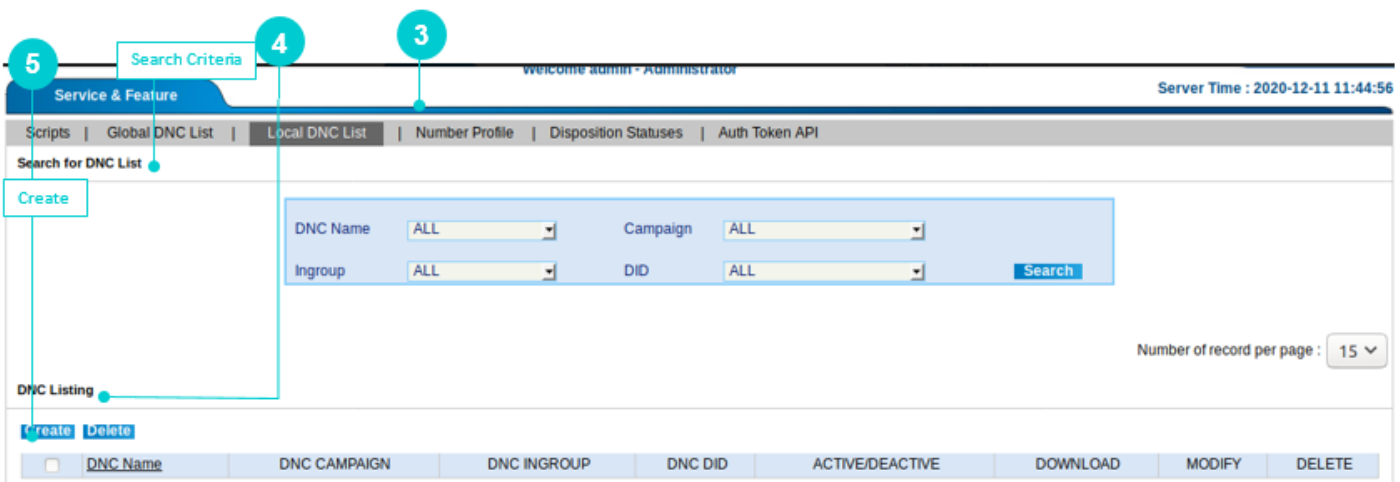


Figure 106 Create Script



6. Add a New Script screen appears.

7. To create a new script enter the parameters as given in the table.

The screenshot shows a web interface for creating a new script. At the top, there is a navigation bar with 'Service & Feature' selected. Below it, a breadcrumb trail shows 'Scripts | Global DNC List | Local DNC List | Number Profile | Disposition Statuses'. The main heading is 'Add a New Script'. The form is divided into two sections: 'Script Detail' and 'Script Text'. In the 'Script Detail' section, there are three fields: 'Script ID *' with the value 'Welcome' and a note '(no spaces or punctuation)'; 'Script Name *' with the value 'Welcome script' and a note '(title of the script)'; and 'Active' with a checked checkbox and the label 'Enable'. In the 'Script Text' section, there is a dropdown menu with 'last_name' selected, an 'Insert' button, and a 'Create' button. The text area contains the following code: 'Hello--A--first_name--B----A--last_name--B--' followed by 'Welcome to Sterlite Technologies.' At the bottom of the form is a blue 'SUBMIT' button. A callout number '6' points to the top of the form, and a callout number '8' points to the 'SUBMIT' button.

Figure 107 Create Script

Table 28 Script parameters

Parameters	Description
Script Detail	
Script ID *	<p>Enter a unique Script ID.</p> <hr/> <p> Note</p> <ul style="list-style-type: none"> • Do not use Space or Punctuation • If the special characters are used while creating a Script, the Script will be created but not displayed in Script Listing.
Script Name *	<p>Enter a name of the Script.</p> <hr/> <p> Note</p> <p>A Script Name should have at least 2 characters and maximum 50 characters.</p>
Active	Select this option to activate the script. An active script is only displayed on the agent's screen.
<p>Script Text – This is the content of the script that is visible to the agent on the screen. To create a script, select field names and click Insert. As you click insert, all values are displayed in the section below. You may also enter your text to create a script.</p>	

8. Once done, click **Submit**.
9. A confirmation message appears. Click **Ok**.
10. The script created in this section is configured from Campaign Management>>Campaign>>Campaign Detail>>Script.

7.1.2 Updating, Searching, and Deleting Scripts

7.1.2.1 Updating Scripts

To update:

1. Click **Edit** corresponding to the Script ID on Script Listing.
2. Modify a Script screen appears.
3. Modify Script Name, Active Status, and Script text, as required.
4. Click **Submit**.
5. You may delete script by clicking **Delete**.

7.1.2.2 Searching Scripts

To search using filter:

1. Enter Script ID/ Script Name.
2. Click **Search**.
3. System returns all Scripts details that contain the search term.
4. To get a list of all Scripts details, click **Search**.

7.1.2.3 Deleting Scripts

Neox provides two ways of deleting the Scripts:

- Single Script deletion – Enables deleting a single script.
 1. Select a Script.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Scripts deletion - Enables deleting multiple scripts.
 1. To delete multiple Scripts, select the Scripts OR to delete all Scripts, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

7.2 DNC Number

This section provides details about the DNC (Do Not Call) Number list registration that allows the administrator in creating DNC lists; System wide and Agent wide. This enables the administrator to create a list of phone numbers that are not called. Any call made to the DNC number is blocked, thus preventing the customers from getting promotional or spam calls.

You can configure DNC Numbers in two ways:

- Global DNC List – This list includes numbers of all leads who have registered for the DNC service. Call cannot be made on this list throughout the system.
- Local DNC List - This list includes numbers of all leads who have registered for the DNC service. Call cannot be made on this list through the specific campaign.

To configure DNC number, do the following steps:

- *Global DNC List*
- *Local DNC List*
- *Updating, Searching, and Deleting DNC List*

7.2.1 Global DNC List

To configure Global DNC List, do the following steps:

- *Creating Global DNC List*
- *Downloading Global DNC List*
- *Deleting Global DNC List*

7.2.1.1 Creating Global DNC List

To create a DNC Number:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Service & Feature**, click **DNC Number**, and then click **Global DNC List**.



Figure 108 Global DNC List menu

3. Add or Delete Numbers From DNC List screen appears.
4. You can create a list of Global DNC either by uploading a CSV or manually creating a list. Additionally, you may also delete the Global DNC number from this section.
5. To create a Global DNC number, select **Add**.

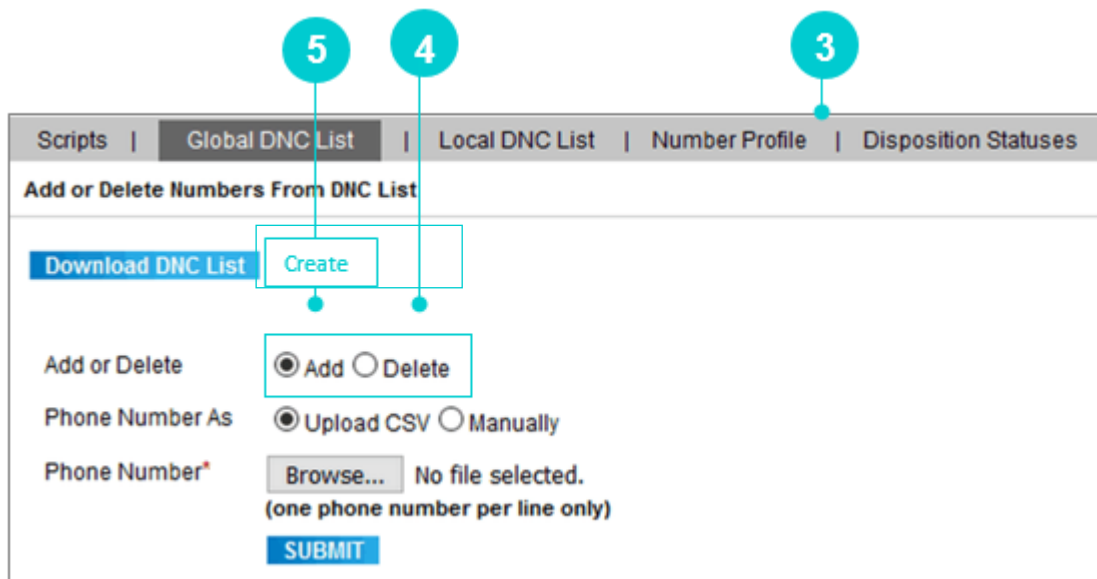


Figure 109 Create Global DNC number

- To create bulk DNC numbers, you need to upload a CSV file. Create a CSV file with the phone_number details, as shown in the following image.

phone_number	
1234567890	
1234567891	
1234567892	
1234567893	




Figure 110 Phone numbers

- Now upload this CSV file by clicking **Browse**.
- Click **Submit**.
- A confirmation message appears.

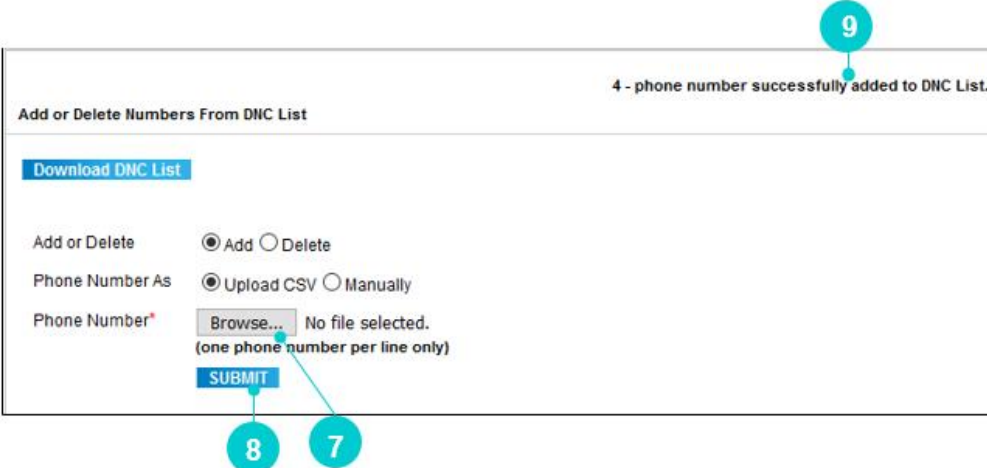


Figure 111 Upload CSV file

- On the other hand, if you want to add the number manually, select *Manually*.

11. Phone Number section is enabled. Add all numbers one below the other to create the DNC list.

The screenshot shows a form for creating a DNC list. At the top, there are two radio buttons: 'Add' (selected) and 'Delete'. Below that, there are two radio buttons: 'Upload CSV' and 'Manually' (selected). A text input field labeled 'Phone Number*' contains the text '1234567899' on the first line and '3333333333' on the second line. Below the input field, there is a note '(one phone number per line only)'. At the bottom of the form, there is a blue 'SUBMIT' button. Three callout boxes with numbers 10, 11, and 12 are present. Callout 10 points to the 'Manually' radio button. Callout 11 points to the right side of the text input field. Callout 12 points to the 'SUBMIT' button.

Figure 112 Create DNC manually

12. Click **Submit**.

13. A confirmation message appears.

7.2.1.2 Downloading Global DNC Numbers

To download:

1. Click Download DNC List.
2. System prompts to save the file.
3. Save the file to your disk drive.

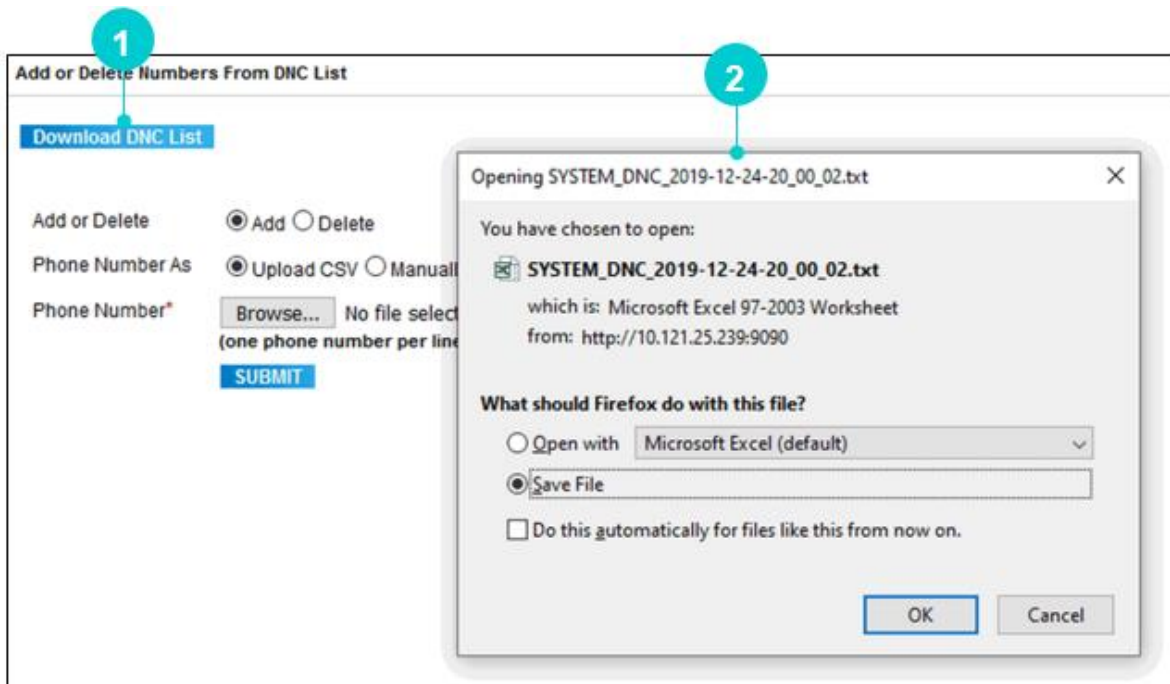


Figure 113 Downloading DNC List

7.2.1.3 Deleting Global DNC Numbers

To delete:

1. Select **Delete**.
2. Phone Number section gets enabled. Here, you need to enter the phone numbers that you want to remove from the Global DNC List. Enter the number one below the other.
3. Click **Submit**.

The screenshot shows a web form titled 'Add or Delete'. At the top, there are two radio buttons: 'Add' (unselected) and 'Delete' (selected). Below this, there are three radio buttons: 'Upload CSV' (unselected) and 'Manually' (unselected). A text input field labeled 'Phone Number*' contains two lines of text: '1234567890' and '9999999999'. Below the input field, there is a note '(one phone number per line only)'. At the bottom of the form, there is a blue 'SUBMIT' button. Three red callout boxes with numbers 1, 2, and 3 are present. Callout 1 points to the 'Delete' radio button. Callout 2 points to the text input field. Callout 3 points to the 'SUBMIT' button.

Figure 114 Delete Global DNC list

4. A confirmation message appears.

7.2.2 Local DNC List

To configure Local DNC List, do the following steps:

- *Creating Local DNC List*
- *Downloading Local DNC List*
- *Deleting Local DNC List*

7.2.2.1 Creating Local DNC List

To create a Local DNC List:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Service & Feature**, click **DNC Number**, and then click **Local DNC List**.



Figure 115 Local DNC List menu

3. Local DNC List screen appears.
4. The screen is bifurcated into two sections; Search for DNC List and DNC Listing.
 - Search for DNC List - Provides a way to search DNC List details using search criteria.
 - DNC Listing - Provides a list view of existing Local DNC List created in the system, including the details such as DNC Name, DNC Campaign, DNC Ingroup, DNC DID, and Activate and Inactivate DNC List. Additionally, you can create, update, search, and delete the DNC List and view details of a Local DNC Listing by clicking its DNC Name.
5. To create a new DNC List, click **Create**.

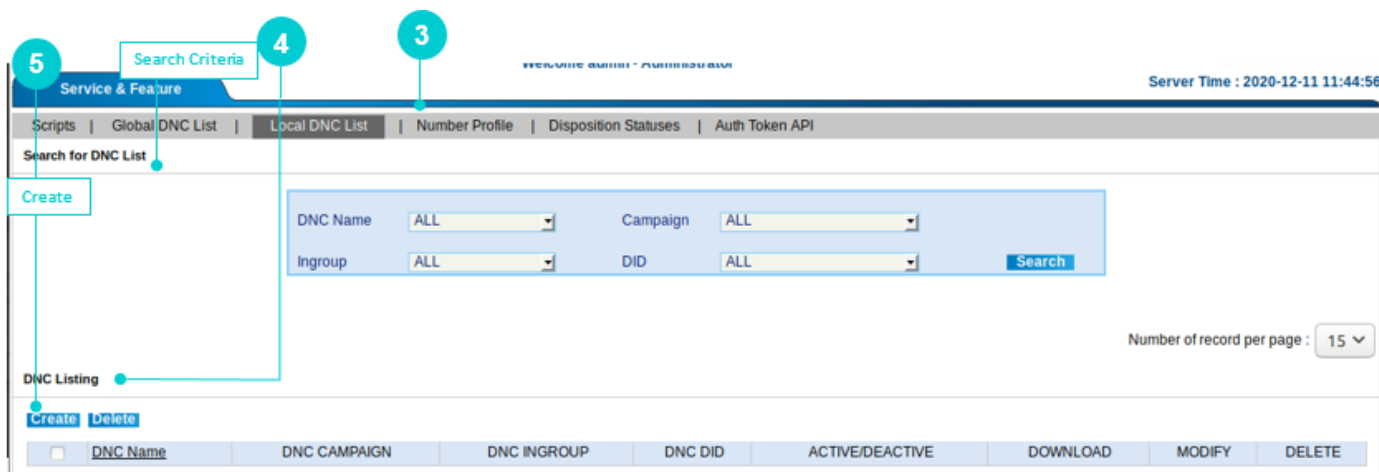


Figure 116 Local DNC List

6. Add New DNC List screen appears.
7. Enter the parameters as given in the table.

Table 29 DNC List Parameters

Parameters	Description
DNC Name	Enter the name of the Local DNC List.
Active	Select this option to activate the Local DNC List.
Allow DNC In	<p>Select where you want to allow the DNC List. The options are:</p> <ul style="list-style-type: none"> • Campaign • In-Group • DID <p>Based on the selection, Campaign, In-Group or DID is listed in the system and call cannot be made by Campaigns/In-Group/DID.</p>

8. To create bulk DNC numbers, upload a CSV file. Create a CSV file with the phone_number details, as shown in the following image.

phone_number	
1234567890	
1234567891	
1234567892	
1234567893	




Figure 117 Phone numbers

9. Now upload this CSV file by clicking **Browse**.
10. Click **Submit**.
11. A confirmation message appears.

Add New DNC List

DNC List Detail

DNC Name *

Active Enable

Allow DNC In Campaign In-Group DID

Phone Number As Upload CSV Manually

Phone Number* DNC.csv ✘
(one phone number per line only)
Enter Areacode with * Like :098*

Figure 118 Upload CSV file

12. On the other hand, if you want to add only numbers manually, select *Manually*.
13. Phone Number section is enabled. Add all numbers one below the other to create the DNC list.

Phone Number As Upload CSV Manually

Phone Number*

(one phone number per line only)

Figure 119 Create DNC manually

14. Click **Submit**.
15. A confirmation message appears.

7.2.2.2 Downloading Local DNC List

To download:

1. Click **Download** corresponding to the Local DNC List.



The screenshot shows a table with columns: DNC Name, DNC CAMPAIGN, DNC INGROUP, DNC DID, ACTIVE/DEACTIVE, DOWNLOAD, MODIFY, and DELETE. The first row is 'Local_DNC_List1'. The 'DOWNLOAD' button is highlighted with a red circle containing the number 1.

<input type="checkbox"/>	DNC Name	DNC CAMPAIGN	DNC INGROUP	DNC DID	ACTIVE/DEACTIVE	DOWNLOAD	MODIFY	DELETE
<input type="checkbox"/>	Local_DNC_List1	view	view	view	=	1	ES	X

Figure 120 Downloading DNC List

2. System prompts to save the file.
3. Save the file to your disk drive.

7.2.3 Updating, Searching, and Deleting DNC List

7.2.3.1 Updating DNC List

To update:

1. Click **Edit** corresponding to the Local DNC List on the DNC Listing.
2. Modify DNC List screen appears.
3. Modify details as required.
4. Click **Submit**.

7.2.3.2 Searching DNC List

To search using filter:

1. Select DNC Name/Campaign/Ingroup/DID.
2. Click **Search**.
3. System returns the DNC List details that contain the search term.
4. To get a list of all DNC List, click **Search**.

7.2.3.3 Deleting DNC List

Neox provides two ways of deleting the DNC List:

- Single DNC List deletion – Enables deleting a single DNC List.
 1. Select a DNC List.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple DNC Lists deletion - Enables deleting multiple DNC Lists.
 1. To delete multiple DNC Lists, select the DNC Lists OR to delete all DNC Lists, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

7.3 Number Profile

This section provides the details about Number Profile, which is a list of predefined phone numbers where the calls can be transferred or conference calls can be conducted. Sometimes, customers request an agent to talk to their manager or transfer of call is required, then Number Profile is defined in the system. In Number Profile, all phone numbers are defined, where an agent can transfer the call.

In Neox DC, administrator can create Number Profiles through a manual or bulk creation process. It is then bind to a campaign that is displayed on the agent's screen. Agent can select a number from the Number Profile to transfer the call.

To manage Number Profile, do the following steps:

- *Creating Number Profile*
- *Updating, Searching, and Deleting Number Profile*

7.3.1 Creating Number Profile

To create a Number Profile:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Service & Feature**, and then click **Number Profile**.

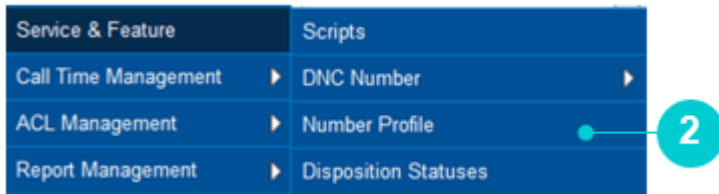


Figure 121 Number Profile menu

3. Number Profile screen appears.
4. The screen is bifurcated into two sections; Search for Profile and Profile Listing.
 - Search for Profile - Provides a way to search Number Profile details using search criteria.
 - Profile Listing - Provides a list view of existing Number Profile created in the system, including the details such as Profile name. Additionally, you can create, update, search, and delete Number Profile and view details of a Pause Code by clicking its Name.
5. To create a new Number Profile, click **Create**.

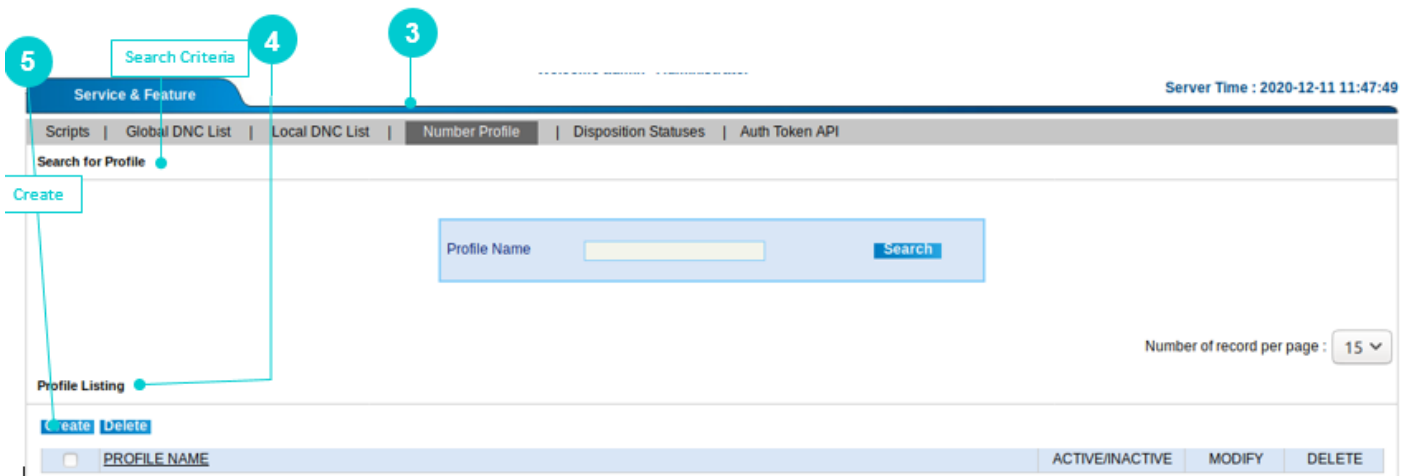


Figure 122 Create Number Profile

6. Add a New Predefine Transfer Number Profile screen appears.

7. Enter the parameters as given in the table.

Table 30 Create Number Profile parameters

Parameters	Description
Profile Detail	
Profile Name *	Enter a name of the Number Profile.
Active	Select this option to activate the Number Profile. Only activated Number Profiles are displayed on the agent's screen.
Predefine Number Detail	
Predefine Numbers As	You can create Number Profile through bulk upload or manually. <ul style="list-style-type: none"> Upload CSV - Create a CSV file with the phone_number details. Now upload this CSV file by clicking Browse. Manually – To add numbers manually, select <i>Manually</i>. Enter the phone number with name in a line. For example, 1234567890,ABC
Validation String Detail	Enter the validation strings that you wanted to allow dialing by the agent. For example, enter 079* to allow the agent dial numbers starting with 079.

8. Click **Submit**.

7.3.2 Updating, Searching, and Deleting Number Profile

7.3.2.1 Updating Number Profile

To update:

1. Click **Edit** corresponding to the Number Profile on Profile Listing.
2. Modify details as required.
3. Click **Submit**.

7.3.2.2 Searching Number Profile

To search using filter:

1. Enter Profile Name.
2. Click **Search**.
3. System returns Number Profile details that contain the search term.
4. To get a list of all Number Profiles, click **Search**.

7.3.2.3 Deleting Number Profiles

Neox provides two ways of deleting the Number Profiles:

- Single Number Profile deletion – Enables deleting a single Number Profile.
 1. Select a Number Profile.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Number Profiles deletion - Enables deleting multiple Number Profiles.
 1. To delete multiple Number Profiles, select the Number Profiles OR to delete all Number Profiles, select the header column.
 2. Click **Delete**.
 3. Click **Ok** to confirm.

7.4 Disposition Status

This section provides information about Disposition Status that tells the outcome of the call. When a call ends, then the agent is facilitated to select a disposition status. This helps the manager in understanding the customer experience, reason for the ended call, default system behavior and so on. The disposition status is bind with the campaign to make it available for its associated agent.

To manage Disposition Status, do the following steps:

- *Creating Disposition Status*
- *Updating, Searching, and Deleting Disposition Status*

7.4.1 Creating Disposition Status

To create a Disposition Status:

1. Log in to Neox DC.
2. In the Navigation Area, click Service & Feature, and then click Disposition Statuses.

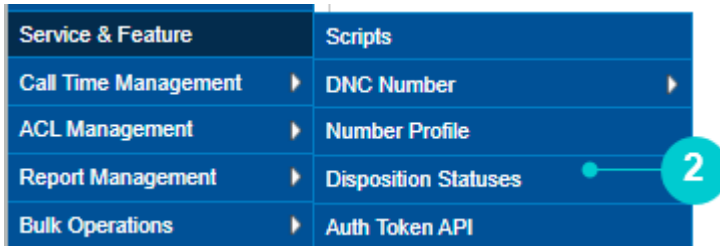


Figure 123 Disposition Status menu

3. Disposition Status screen appears.
4. The screen is bifurcated into two sections; Search for Disposition Status and Disposition Status Listing.
 - Search for Disposition Status - Provides a way to search Disposition Status details using search criteria.
 - Disposition Status Listing - Provides a list view of existing Disposition Statuses created in the system, including the details such as Status and Status Name. Additionally, you can create, update, search, and delete Disposition Status.
5. To create a new Disposition Status, click **Create**.

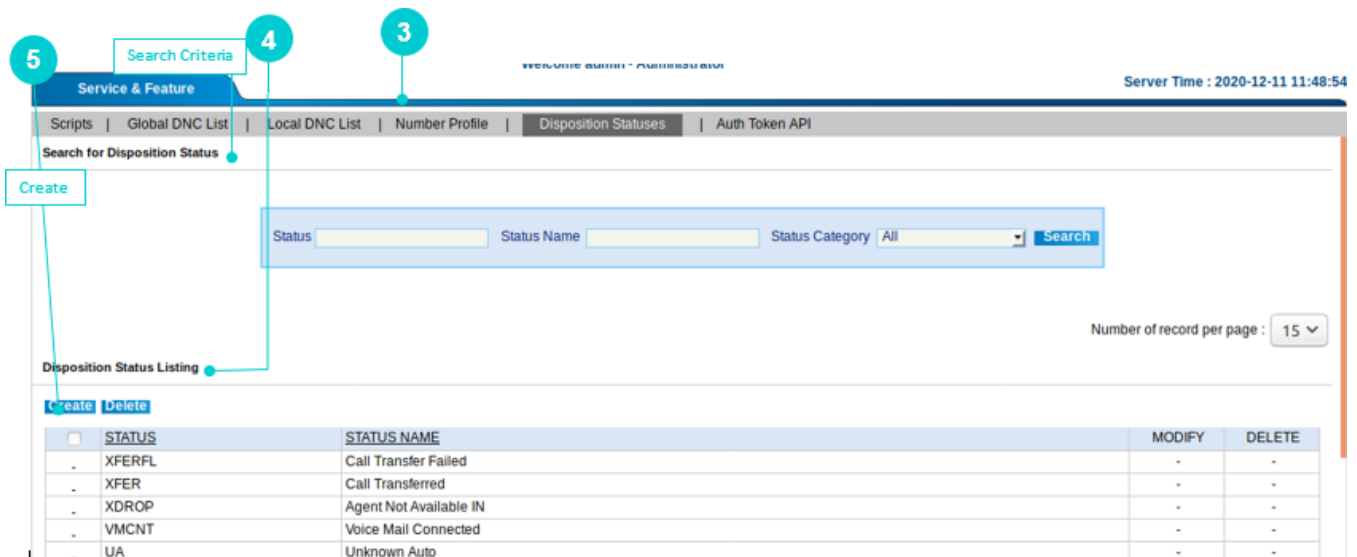



Figure 124 Create Disposition Status

6. Add a New Disposition Status screen appears.

7. Enter the parameters as given in the table and select Category and bind with the Campaign.

Table 31 Create Disposition Status parameters

Parameters	Description
Status Detail	
Status ID *	Enter a unique id of the Disposition Status.
Status Name*	Enter a name of the Disposition Status.
Active	Select this option to activate the Disposition Status.
Available to All Campaign	Select this option to bind this Disposition Status with all Campaigns.
Parent Category	Select a category to which the disposition belongs to. <div style="border: 1px solid black; padding: 5px;"> <p> Note All Human Answer calls will be displayed in the Answered calls in Reports</p> </div>
Select Campaign	Select a Campaign to bind the Disposition Status with it.

8. Click **Submit**.

Neox DC provides a list of default Disposition Statuses on which no CRUD operations can be performed. Additionally, following Disposition Statuses are already available in the system:

Table 32 Disposition Status

Status	Status Name	Description
A	Answering Machine	Agent-defined Answering Machine.
AA	Answering Machine Auto	System-defined Answering Machine.
AB	Busy Auto	Dialer defines user busy

 **Note**

PRI provider has to propagate Busy signal.

Table 33 Disposition Status

Status	Status Name
ADC	Disconnected Number Auto

 **Note**

Based on proper signalling provided by PRI provider.

Table 34 Disposition Status

Status	Status Name	Description
AFAX	Fax Machine Auto	
AFTHRS	After Hours	Inbound after hours drop means an inbound call has landed after the working hours of the agent were over.
AGTCNT	Agent Connected	Agent Connected to the call, normally used in Hybrid and Phone Login/Logout environment, where Dial Center GUI is not used.
AM	Answering Machine Sent to Message	It goes on the customer's answering machine.
AL	Answering Machine Message Played	A message is played by the answering machine after no answer.
ATCTND	Neox Server Down Agent Connect	Agent is connected and the Neox PBX server goes down, while the Dial Center is running.
B	Busy	Carrier-received busy signal or agent-defined busy, if allowed.
BRWSRX	Browser Close	Ongoing active call, agent closes the browser and the call gets disconnected.
CALLBK	Call back	Call back or scheduled call back.
CBHOLD	Call Back Hold	When the campaign doesn't have configuration for call back and still the agent needs to make a call back. It is a system status.

Status	Status Name	Description
CNE	Call Not Exist	Call available in Dial Center, but not in Neox PBX.

 **Note**

This is an abrupt condition and should not arise.

Table 35 Disposition Status

Status	Status Name	Description
DBX	Deleted from Dashboard	Displays lead deleted from dashboard.
DC	Disconnected Number	Displays when the number is disconnected.
DCDB	Disconnected from Dashboard	Displays the calls disconnected from the dashboard.
DEC	Declined Sale	Agent-defined status.
DIALTO	Dial Timeout	Agent calls the customer, the customer does not answer the call for more than configured value (seconds), and then the call gets disconnected. Mainly used in outbound call.
DISPO	Improperly Disposed.	Used by Agent to dispose the call manually. This condition arises when Agent GUI loses connectivity with the Dial Center.
DNC	DO NOT CALL	Customer requested for Do Not Call.
DROP	Agent Not Available	Call was dropped, while the customer was waiting for an agent.
DROPND	Neox Server Down, Agent Not Available.	Call gets disconnected due to PBX server down, while the call is not allocated to Agent.
DRPTO	Dialer Response Timed Out	Displays when Neox DC is not responding during the live call.
EXTCNT	External Number Connected	Dial Center informs whether the call was connected to the external number or not.
INCALL	Lead Being Called	Agent is talking to the lead.
INVA	Invalid Number Auto	Number invalid identified by the system.
IVRDRO	Disconnected On IVR	Call terminates at IVR, do not enter any queue.
N	No Answer	Agent-defined status.
NA	No Answer Auto	Any outbound call that does not receive an Answer signal (or other signal) from the carrier. This can include ring-no-answer, disconnected, carrier congestion, and other errors.

 **Note**

Based on proper signalling provided by PRI provider.

Table 36 Disposition Status

Status	Status Name	Description
NANQUE	Inbound No Agent No Queue Drop	Any inbound call that has no agent available or no queue and the call is dropped on no answer.
NEW	New Lead	Lead has not been called, or cannot be called.
NI	Not Interested	Agent-defined status.
NP	No Pitch No Price	Agent-defined status.
NRPTO	Neox Response Timed Out	Used when the Dial Centre configuration is off. So, if request goes to the Dial Center, it gets timed out.
PF	Message Parsing Failed	Internal Communication failure between PBX and Dial Center.

 **Note**

This is an abrupt condition and should not arise.

Table 37 Disposition Status

Status	Status Name	Description
QUEUE	Lead To Be Called	Lead is about to be sent to an agent.
RA	Reject Auto	Customer rejected the call.

 **Note**

Based on proper signalling provided by PRI provider.

Table 38 Disposition Status

Status	Status Name	Description
SALE	Sale Made	Agent-defined status
SKIP	Lead Skipped	Lead skipped by the agent and the next lead is dialed.
TIMEOT	Inbound Queue Timeout Drop	Used if the call is dropped on agent hold and the calls doesn't get answered by any agent.
TRASH	Lead Trashed	If the number is wrong/ customer comments say the customer is not interested, the agent can delete or trash the lead and dial the next lead available.
UA	Unknown Auto	Call gets terminated due to some other unknown reason.

 **Note**

Based on proper signalling provided by PRI provider.

Status	Status Name	Description
VMCNT	Voice Mail Connected	The status of the voicemail is connected or not.
XFER	Call Transferred	Call has been sent from an agent to a closer agent.
XFERFL	Call Transfer Failed	Agent failed to transfers the call from the Dial Center GUI.

7.4.2 Updating, Searching, and Deleting Disposition Status

7.4.2.1 Updating Disposition Status

To update:

1. Click **Edit** corresponding to the Disposition Status on Disposition Status Listing.
2. Modify details as required.
3. Click **Submit**.

7.4.2.2 Searching Disposition Status

To search using filter:

1. Enter Status/Status Name or select Status Category.
2. Click **Search**.
3. System returns Number Profile details that contain the search term.
4. To get a list of all Disposition Statuses, click **Search**.

7.4.2.3 Deleting Disposition Statuses

Neox provides two ways of deleting the Disposition Statuses:

- Single Disposition Status deletion – Enables deleting a single Disposition Status.
 1. Select a Disposition Status.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Disposition Statuses deletion - Enables deleting multiple Disposition Statuses.
 1. To delete multiple Disposition Statuses, select the Disposition Statuses OR to delete all Disposition Statuses, select the header column.
 2. Click **Delete**.
 3. Click **Ok** to confirm.

Note

Default system status cannot be modified or deleted.

7.5 Auth Token API

This section provides details about the Auth Token API feature. This feature enhances security in API communication by introducing a mechanism of token-based authentication with token expiration. Each API communication requires a valid token, which is fetched from the API server and is used until deemed expired by the API server.

This feature allows fetching security tokens as per configuration when firing CRM Notification APIs for exchanging information. The application sends the token as a header/body in the next request for authentication purposes.

Note

Auth Token API can be attached in the CRM notification configuration of Campaign, In-group, and DID level.

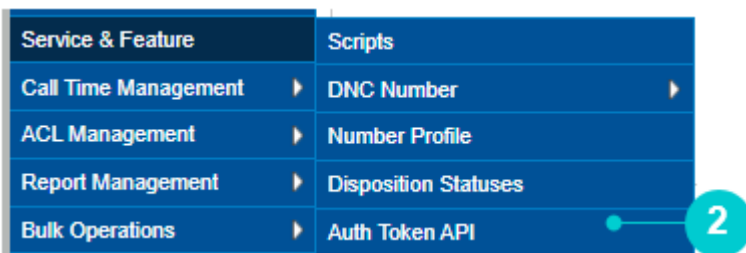
The following section describes steps to:

- Add Auth Token API
- Modify, Search and Delete Auth Token API

7.5.1 Add Auth Token API

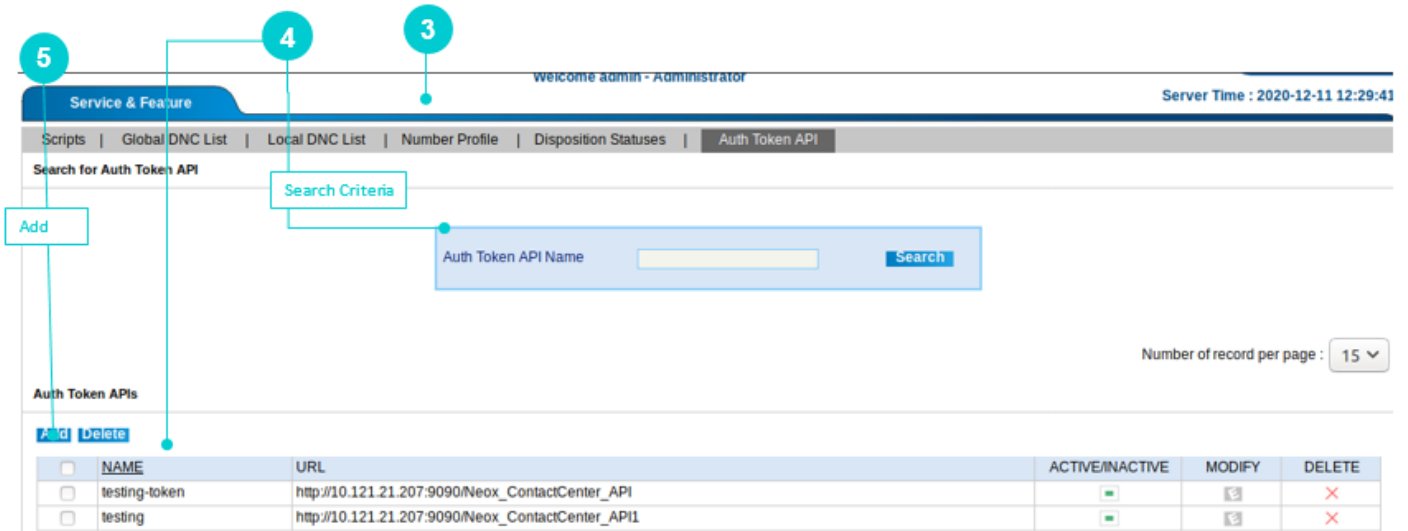
To add an Auth Token API:

1. Log in to Neox DC.
2. In the Navigation Area, click **Service & Feature**, and then click **Auth Token API**.

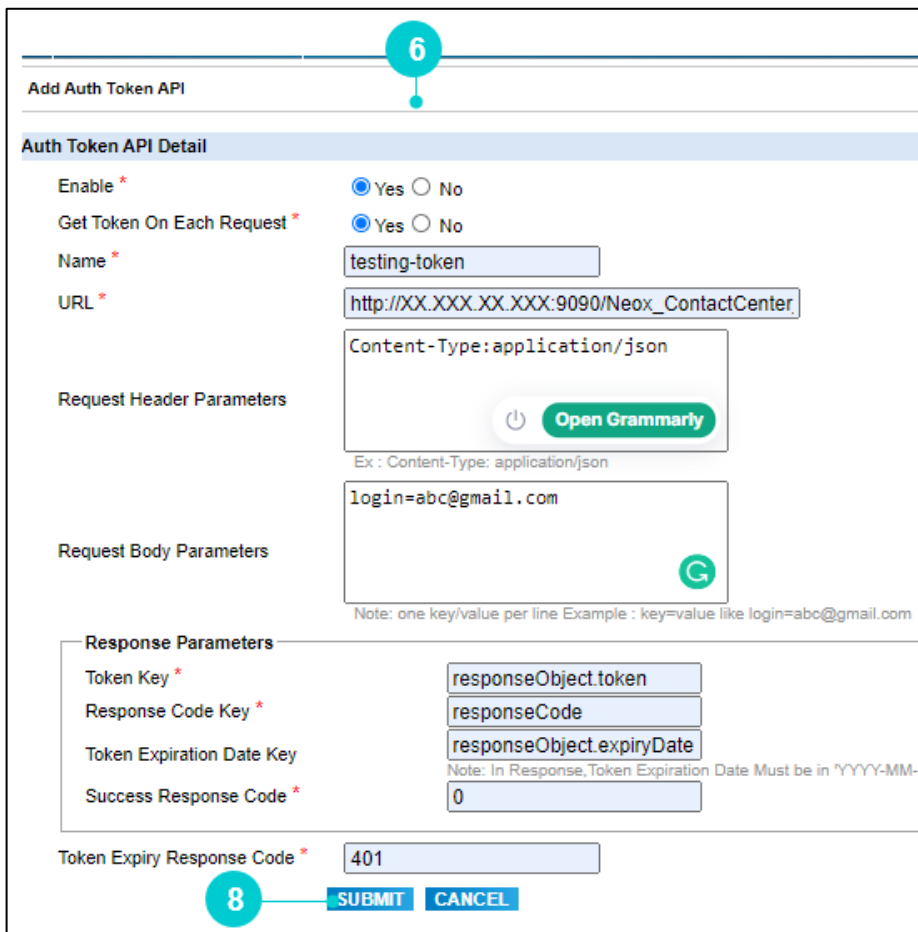


3. **Auth Token API** screen appears.
4. The screen is bifurcated into two sections; *Search for Auth Token API* and *Auth Token API listing*.
 - a. Search option provides a way to search Auth Token API using the *Name* criteria.
 - b. Auth Token API listing provides a list view of existing Auth Token API including the details such as Name, URL, and Status. Additionally, you can create, update, search, and delete Auth Token API.

5. To add a new Auth Token API Status, click **Add**.



6. Add Auth Token API screen appears.

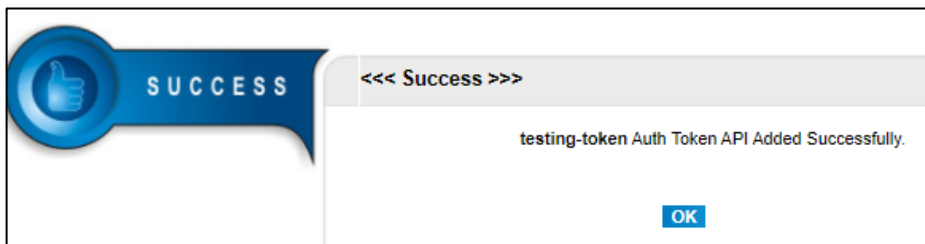


7. Enter the parameters as given in the table.

Parameters		Description
Enable		Click Yes to enable the Auth Token API. No option is selected by default.
Get Token On Each Request *		Click Yes to get a token on each request. No option is selected by default.
Name *		Type the name of the Auth Token API configuration.
URL *		Type the URL to get the token.
Request Header Parameters		It refers to the format in which the request is send. For example, JSON, text, HTML, etc.
Request Body Parameters		It refers to the parameters based on which the token is created. For example, ipAddress=10.121.21.206
Response Parameters	Token Key *	It refers to the Token Key in the API response. For example, responseObject.token
	Response Code Key *	It refers to key based on which the Response Code is received. For example, responseCode
	Token Expiration Date Key	It refers to expiry date token key in the API response. For example, responseObject.expiryDate
	Success Response Code *	It refers to the format of the success response code. For example, 200
Token Expiry Response Code *		It refers to the format of the token expiry response code. For example, 401

8. Click **Submit**.

9. A confirmation message is displayed. Click **OK**. The application returns to



7.5.2 Updating and Deleting Auth Token API

In addition to adding Auth Token API, you may also update and delete tokens.

7.5.2.1 Update Auth Token API

To update:

1. Click **Edit** corresponding to the Campaign.

Auth Token APIs				
		ACTIVE/INACTIVE	MODIFY	DEL
<input type="checkbox"/>	NAME	URL		
<input type="checkbox"/>	testing-token	http://XX.XXX.XX.XXX:9090/Neox_ContactCenter_API		

2. Modify Auth Token API screen appears. Make the necessary changes.

Modify Auth Token API 2

Auth Token API Detail

Enable * Yes No

Get Token On Each Request * Yes No

Name *

URL *

Request Header Parameters

Ex : Content-Type: application/json

Request Body Parameters

Note: one key/value per line Example : key=value like login=abc@gmail.com

Response Parameters

Token Key *

Response Code Key *

Token Expiration Date Key

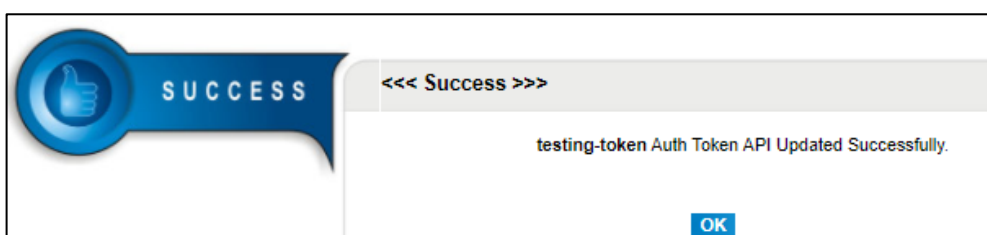
Note: In Response,Token Expiration Date Must be in ^YYYY-MM-DD

Success Response Code *

Token Expiry Response Code *

3


3. Click **Submit**.
4. A confirmation message is displayed. Click **OK**. The application returns to the Auth Token API home screen.



7.5.2.2 Search Auth Token API

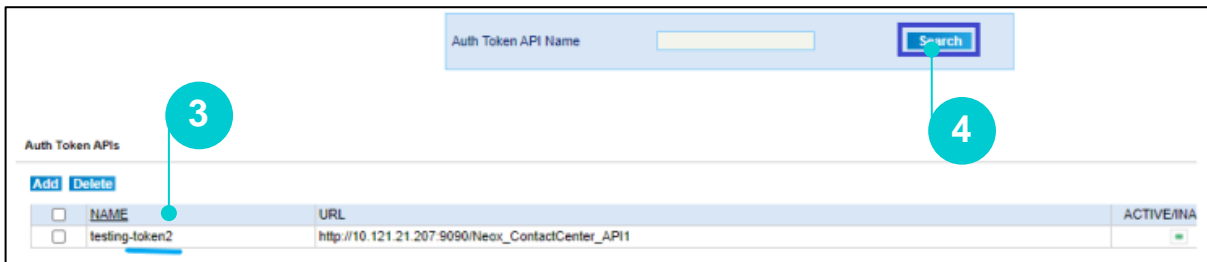
To search using filter:

1. Type the token name.
2. Click **Search**.



A screenshot of a search interface. At the top, there is a label 'Auth Token API Name' followed by a text input field containing the text 'token2'. A blue circle with the number '1' points to the input field. To the right of the input field is a blue button labeled 'Search'. A blue circle with the number '2' points to the 'Search' button.

3. Application returns the matched token.



A screenshot of the search results page. At the top, there is a search bar with the label 'Auth Token API Name' and a 'Search' button. A blue circle with the number '4' points to the 'Search' button. Below the search bar, there is a table titled 'Auth Token APIs'. The table has columns for 'NAME' and 'URL', and an 'ACTIVE/INA' column. A blue circle with the number '3' points to the 'NAME' column. The table contains one row with the name 'testing-token2' and the URL 'http://10.121.21.207:9090/Neox_ContactCenter_API1'. There are 'Add' and 'Delete' buttons above the table.

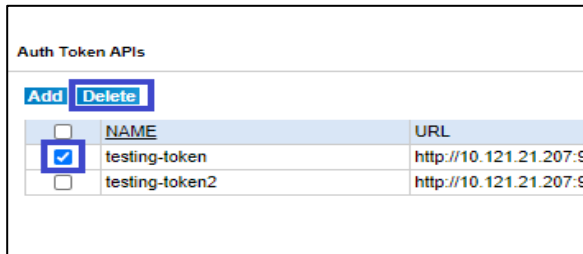
	NAME	URL	ACTIVE/INA
<input type="checkbox"/>	testing-token2	http://10.121.21.207:9090/Neox_ContactCenter_API1	<input type="checkbox"/>

4. To get a list of all Campaigns details, click **Search**.

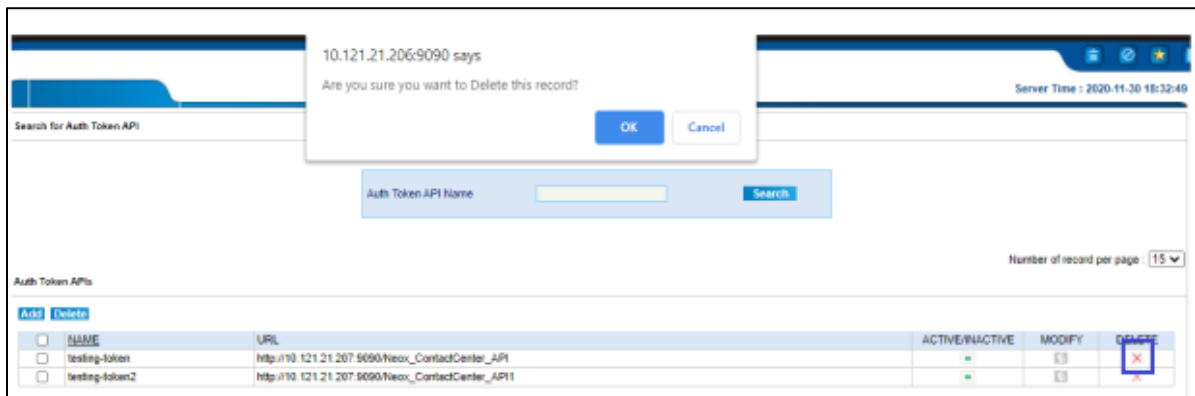
7.5.2.3 Delete Auth Token API

Neox provides two ways of deleting the Auth Token API

1. To delete a single token, follow the below steps:
 - a. Select the corresponding checkbox and click **Delete**.

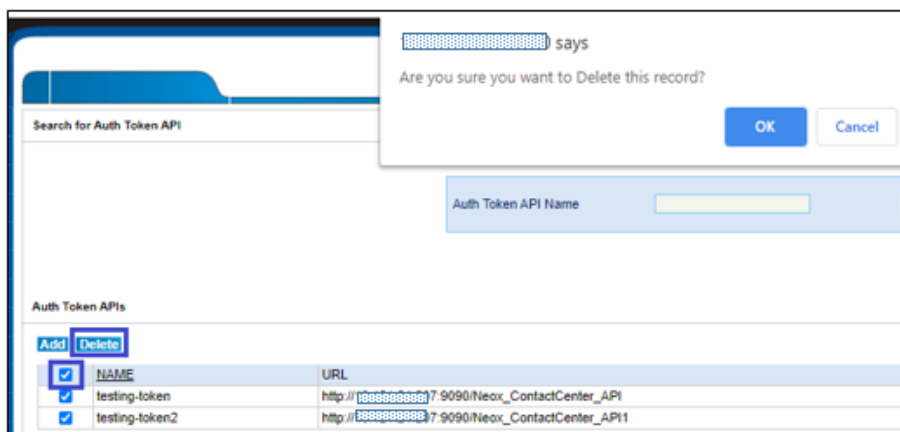


- b. Alternatively, click **X** button.
- c. A message is displayed to confirm the action. Click **OK**.



2. To delete multiple tokens, follow the below steps:

- a. Select the checkbox of tokens to be deleted and click **Delete**.
- b. To delete all tokens, select the header checkbox and click **Delete**.
- c. A message is displayed to confirm the action. Click **Ok**.



3. The token(s) is deleted and a confirmation message is displayed.



7.5.3 New Registries

Following is the list of the new Registries:

1. Configuration to check token expiry before time:

Token_Expiry_Before_Time => 5 (Default = 5, min = 1, Max = 60)

This configuration checks the token 5 minutes before the expiry time if this token is already fetched.

2. Configuration of the retry count for Auth Token APIs:

Token_Fetch_Retry_Count => 1 (Default = 1, min = 1, Max = 10)

This configuration allows setting the maximum number of retries the DC performs when it fails to get the token as configured.

3. Configuration for setting connection timeout and response timeout for API communication with Server. All configuration values are in seconds.

API_Connection_Timeout => 5 (Default = 5, min = 1, Max = 10)

API_Response_Timeout => 30 (Default = 30, min = 1, Max = 60)

This configuration specifies the amount of time the application waits for the requested operation to be performed by the remote server.

8. Call Time Management

This chapter provides information about Call Time Management that enables to restrict the time and days, customers can be called on or calls can be received by the customers. These are currently definable by days of the week down to hours and minutes. You can also create special rules to override these call times definitions by State (province). Moreover, you can create the schedule for your team to work on different shifts.

Contents:

- *Call Times*
- *State Call Times*
- *Shifts*

8.1 Call Times

This section provides details about Call Times that enables the administrator to define the call times for the Campaign or in-Groups. This enables the agent to call the customers or receive calls from the customers within the defined time.

To manage Call Times, do the following steps:

- *Creating Call Times*
- *Updating, Searching, and Deleting Call Times*

8.1.1 Creating Call Times

To create a Call Time:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Call Time Management**, and then click **Call Times**.

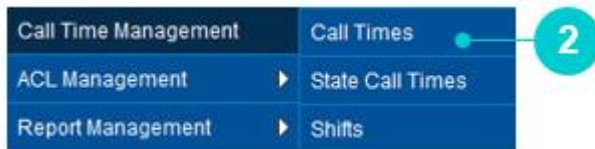


Figure 125 Call Times menu

3. Call Times screen appears.
4. The screen is bifurcated into two sections; Search for Call Time and Call Time Listing.
 - Search for Call Time- Provides a way to search Call Time details using search criteria.
 - Call Time Listing - Provides a list view of existing Call Times created in the system, including the details such as Call Time ID, Call Time Name, and Default Start and Stop time. Additionally, you can create, update, search, and delete Call Time and view details of a Call Time by clicking its Call Time ID.
5. To create a new Call Time, click **Create**.

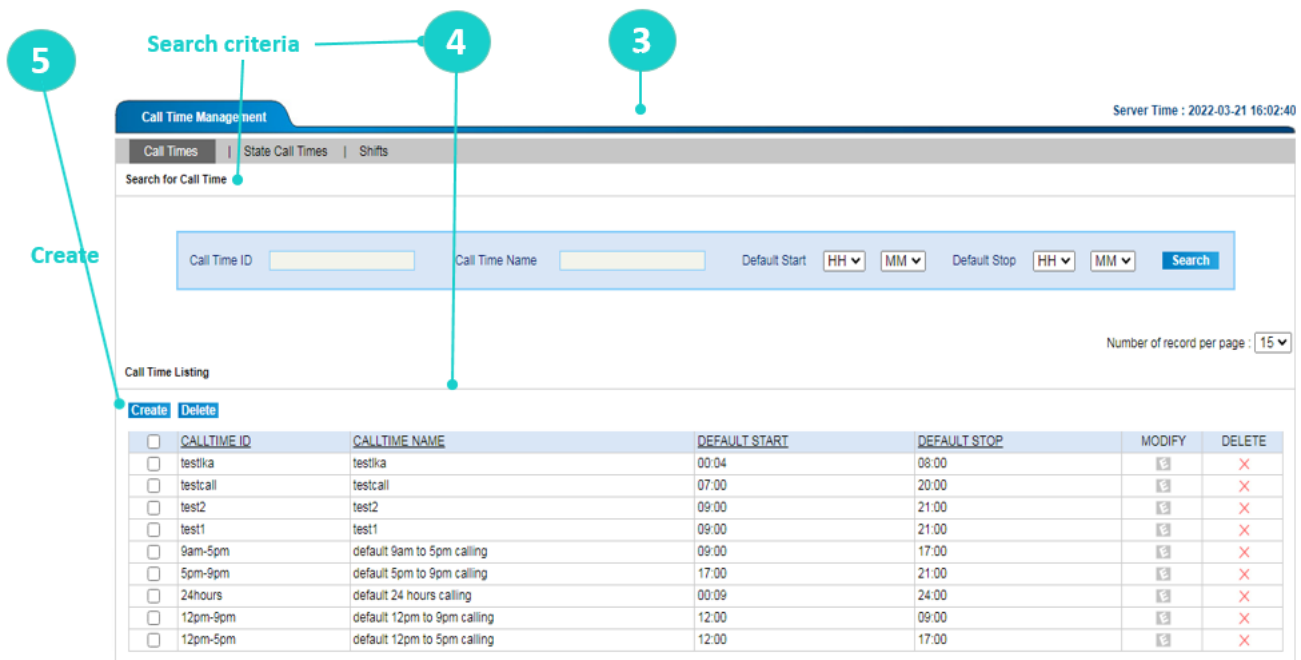


Figure 126 Create Call Time using Call Times filter

6. Add a New Call Time screen appears.

7. To create a new Call Time enter the parameters as given in the table.

The screenshot shows the 'Call Time Management' interface. At the top, there are tabs for 'Call Times', 'State Call Times', and 'Shifts'. Below this is a section titled 'Add a New Call Time'. Underneath, there is a 'Call Time Detail' section with two input fields: 'Call Time ID *' containing '4AM-8AM' with a note '(no spaces or punctuation)', and 'Call Time Name *' containing '4AM-8AM' with a note '(short description of the call time)'. Below this is a 'Start - Stop Time' section with a table of dropdown menus for 'Start Time' and 'End Time' (Hour and Minute) for each day of the week. The 'Default' row shows '04' and '00' for start, and '08' and '00' for end. A 'SUBMIT' button is located at the bottom left of the form area. A callout '6' points to the top of the form, and a callout '8' points to the 'SUBMIT' button.

Figure 127 Create Call Time

Table 39 Script parameters

Parameters	Description
Call Time Detail	
Call Time ID *	Enter a unique Call Time ID. <div style="border: 1px solid black; padding: 2px;"> Note Do not use space or punctuation. </div>
Call Time Name *	Enter a name of the Call Time.
Start-Stop Time	
Default	Set the Start and Stop time from the timer to allow call in campaigns and ingroups. This is the default time when the calling

Parameters	Description
	<p>is allowed to be started or stopped, if the day-of-the-week start time is not defined.</p> <ul style="list-style-type: none">• 0 is midnight.• To prevent calling completely set this field to 2400 and set the Default Stop time to 2400.• To allow calling 24 hours a day, set the start time to 0 and the stop time to 2400.
Sunday-Saturday	If you want to set different call times during the week, then set the start and end time throughout the week.

8. Once done, click **Submit**.
9. A confirmation message appears. Click **Ok**.

8.1.2 Updating, Searching, and Deleting Call Times

8.1.2.1 Updating Call Times

To update:

1. Click **Edit** corresponding to the Call Time on Call Time Listing.
2. Modify a Call Time screen appears.
3. Modify Call Time details, as required. Call Time ID cannot be modified.
4. You can apply State Call Time Rule on the call time as per your requirement.
5. Click **Submit**.
6. You may delete Call Time by clicking **Delete**.

8.1.2.2 Searching Call Time

To search using filter:

1. Enter Call Time ID/Call Time Name/Default Start Time/Default Stop Time.
2. Click **Search**.
3. System returns Call Time details that contain the search term.
4. To get a list of all Call Time details, click **Search**.

8.1.2.3 Deleting Call Times

Neox provides two ways of deleting the Call Times:

- Single Call Time deletion – Enables deleting a single Call Time.
 1. Select a Call Time.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Call Times deletion - Enables deleting multiple Call Times.
 1. To delete multiple Call Times, select the Call Times OR to delete all Call Times, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

8.2 State Call Times

This section provides details about State Call Times that enables the administrator to define calling time for the state to override any other call time settings defined in the system. This allows the agent to call a customer of the state only on the configured call time. The facility of State Call Time is defined so that agent can reach the customer seamlessly at the specified time. After the time period expires, the agent cannot place the call.

To manage State Call Times, do the following steps:

- *Creating State Call Times*
- *Updating, Searching, and Deleting State Call Times*

8.2.1 Creating State Call Times

To create a State Call Time:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Call Time Management**, and then click **State Call Times**.

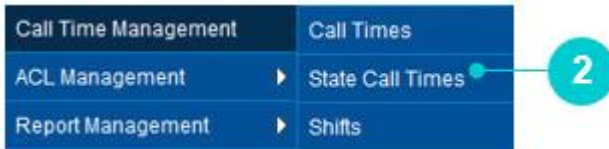


Figure 128 State Call Times menu

3. State Call Times screen appears.
4. The screen is bifurcated into two sections; Search for Call Time and Call Time Listing.
 - Search for Call Time- Provides a way to search Call Time details using search criteria.
 - Call Time Listing - Provides a list view of existing Call Times created in the system, including the details such as Call Time ID, Call Time Name, and Default Start and Stop time. Additionally, you can create, update, search, and delete Call Time and view details of a Call Time by clicking its Call Time ID.
5. To create a new Call Time, click **Create**.

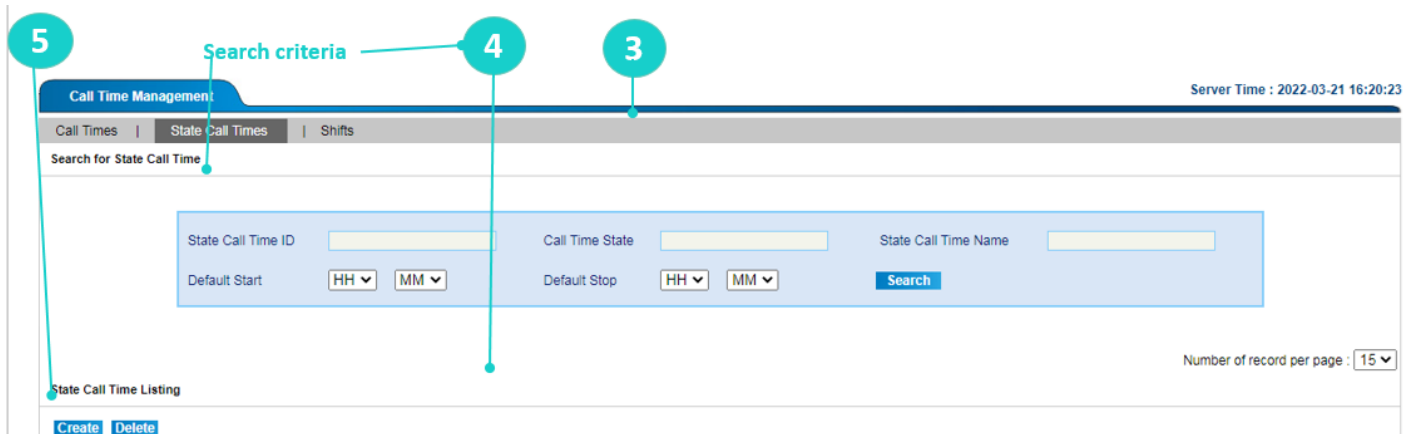


Figure 129 Create State Call Time using State Call Times filter

6. Add a New State Call Time screen appears.

To create a new Call Time, enter the parameters as given in the table.

Figure 130 Create State Call Time

Table 40 State Call Time parameters

Parameters	Description
State Time Detail	
State Call Time ID*	Enter a unique State Call Time ID. Note Do not use space or punctuation.
State Call Time State*	Enter a code of the State.
State Call Time Name*	Enter a name of the State.

Parameters	Description
Start-Stop Time	
Default	<p>This is the default time when the calling is allowed to be started or stopped if the day-of-the-week start time is not defined.</p> <ul style="list-style-type: none">• 0 is midnight.• To prevent calling completely set this field to 2400 and set the Default Stop time to 2400.• To allow calling 24 hours a day, set the start time to 0 and the stop time to 2400.
Sunday-Saturday	<p>If you want to set different call times during the week, then set the start and end time throughout the week.</p>

7. Once done, click **Submit**.
8. A confirmation message appears. Click **Ok**.

8.2.2 Updating, Searching, and Deleting State Call Times

8.2.2.1 Updating State Call Times

To update:

1. Click **Edit** corresponding to the State Call Time on State Call Time Listing.
2. Modify a State Call Time screen appears.
3. Modify State Time details, as required. Call Time ID cannot be modified.
4. Click **Submit**.
5. You may delete State Call Time by clicking **Delete**.

8.2.2.2 Searching State Call Time

To search using filter:

1. You can search State Call Time using State Call Time ID, Call Time State, State Call Time Name, Default Start and Default Stop.
2. Click **Search**.
3. System returns State Call Time details that contain the search term.
4. To get a list of all State Call Time details, click **Search**.

8.2.2.3 Deleting State Call Times

Neox provides two ways of deleting the State Call Times:

- Single State Call Time deletion – Enables deleting a single State Call Time.
 1. Select a State Call Time.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple State Call Times deletion - Enables deleting multiple State Call Times.
 1. To delete multiple State Call Times, select the State Call Times OR to delete all State Call Times, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

8.3 Shifts

This section provides details about configuring work shifts of the agents. This allows the organizations in handling multiple work shifts of their employees, helping in understanding their responsibilities, such as shift or reporting timing in work. You can schedule the shift considering the organization's working hours every day. The shifts can be scheduled in 24 hours' format.

To manage Shifts, do the following steps:

- *Creating Shifts*
- *Updating, Searching, and Deleting Shifts*

8.3.1 Creating Shifts

To create a Shift:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Call Time Management**, and then click **Shifts**.

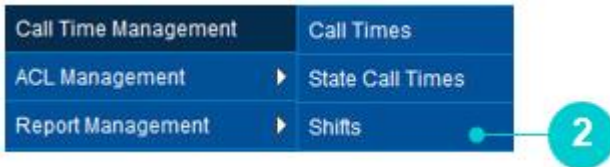


Figure 131 Shifts menu

3. Shifts screen appears.
4. The screen is bifurcated into two sections; Search for Shifts and Shift Listing.
 - Search for Shifts - Provides a way to search Shifts details using search criteria.
 - Shift Listing - Provides a list view of existing Shifts created in the system, including the details such as Shift ID, Shift Name, Shifts Start time, Shift Length, and Weekdays. Additionally, you can create, update, search, and delete Shifts and view details of a Shift by clicking its Shift ID.
5. To create a new Shift, click **Create**.

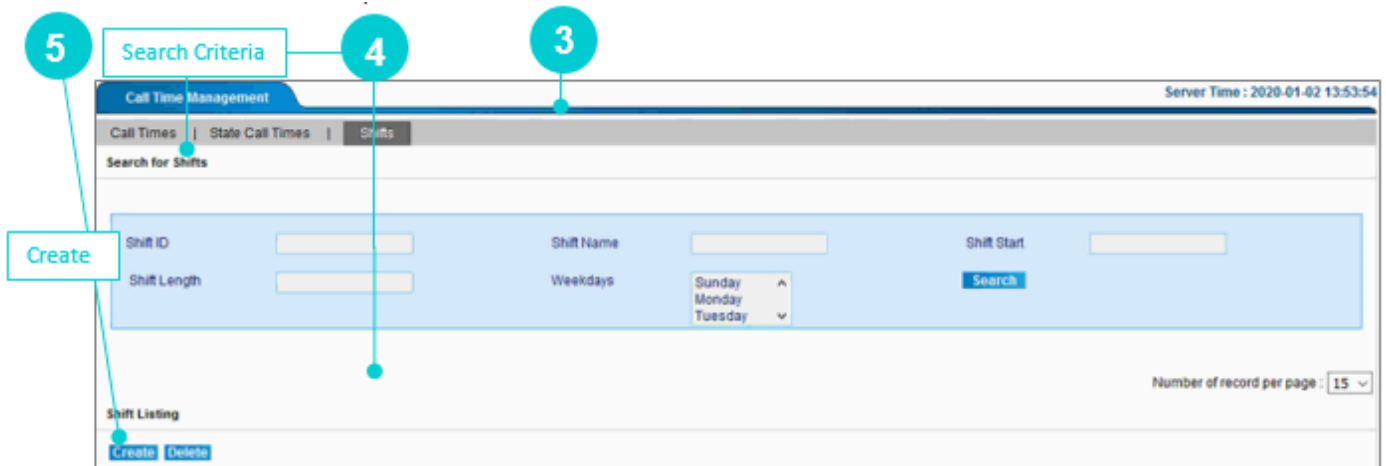


Figure 132 Create Shift

6. **Add a New Shift** screen appears.

To create a new **Shift** enter the parameters as given in the table.

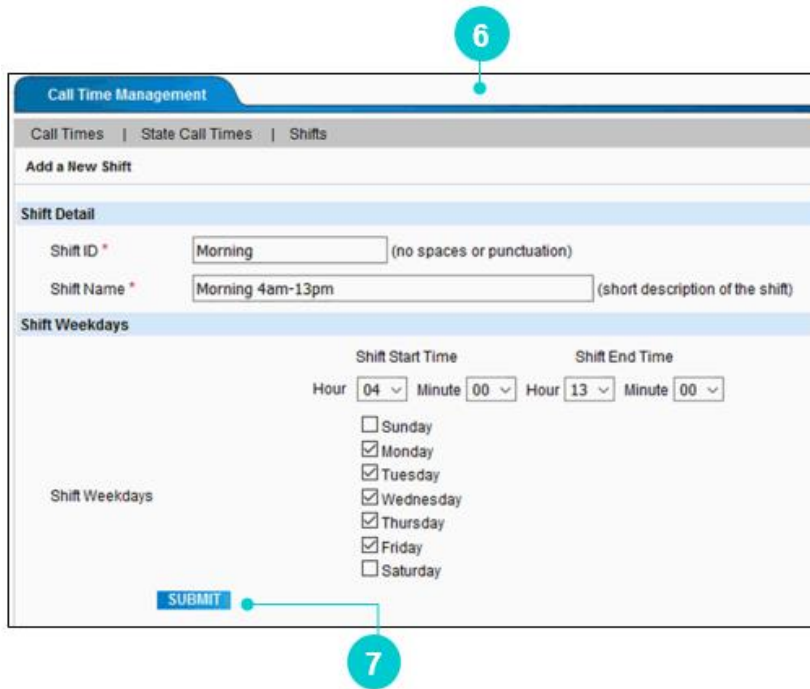


Figure 133 Create Shift

Table 41 Create Shift parameters

Parameters	Description
Shift Detail	
Shift ID*	Enter a unique Shift ID. Note Do not use space or punctuation.
State Call Time Name*	Enter a name of the Shift.
Shift Weekdays	
Shift Weekdays	To set call times during the week, set the shift start and end time. Based on the time, select the weekdays. The time selected is applicable on all selected weekdays.

7. Once done, click **Submit**.

8. A confirmation message appears. Click **Ok**.

8.3.2 Updating, Searching, and Deleting Shift

8.3.2.1 Updating State Call Times

To update:

1. Click **Edit** corresponding to the Shift on Shift Listing.
2. Modify a Shift screen appears.
3. Modify Shift Name and Time details, as required. Shift ID cannot be modified.
4. Click **Submit**.
5. You may delete Shift by clicking **Delete**.

8.3.2.2 Searching State Call Time

To search using filter:

1. You can search Shift using State Shift ID, Shift Name, Shift Start, Shift Length and Weekdays.
2. Click **Search**.
3. System returns Shift details that contain the search term.
4. To get a list of all Shift details, click **Search**.

8.3.2.3 Deleting Shifts

Neox provides two ways of deleting the Shifts:

- Single Shift deletion – Enables deleting a single Shift.
 1. Select a Shift.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Shifts deletion - Enables deleting multiple Shifts.
 1. To delete multiple Shifts, select the Shifts OR to delete all Shifts, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

9. ACL Management

This chapter provides information about ACL (Access Control List) Management that enables the administrator to create access rules for the system users of various profiles, such as Super Admin, User Groups, and Campaign. The rule allows the users to control the Campaign, Ingroup, and User Group. By specifying the access to the system users, you can control the actions on the modules.

For example, organizations with a large number of teams have a Manager to lead the team. In such case, you can create a User, Manager Profile, and bind the user to the Manager's Profile. The Manager can perform the actions, such as Create, Update, Delete, and View on based on the delegated rights of the Manager's profile.

For ACL Management, do the following:

1. Create an ACL User Profile. For example, Project Manager. Refer to *ACL Profile>>Creating ACL Profile*.
2. Modify ACL User Profile and delegate modules and functionality access.
3. Create an ACL User, let's say agent_01. Refer to *ACL User>>an Creating ACL User*.
4. Bind the ACL user with the ACL User Profile. Let's say, bind agent_03 with Project_Manager profile. Perform the additional configuration based on the profile selected.
5. Now, Project Manager can login using valid credentials.

Based on the above configuration, Project Manager can login to its account and access only the assigned modules/functionality.

Contents:

- *ACL User*
- *ACL Profile*
- *ACL User Profile Binding*

9.1 ACL User

This section provides details about ACL User creation that enables in creating system user's profiles to log in and access the system.

 **Note**

Before creating an ACL user, make sure to have an ACL Profile. To create an ACL Profile, refer to *Creating ACL Profile*.

To manage ACL User, do the following steps:

- *Creating ACL User*
- *Adding a New User Profile Binding*
- *Updating, Searching, and Deleting ACL User*

9.1.1 Creating ACL User

To create an ACL User:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **ACL Management**, and then click **ACL User**.



Figure 134 ACL User menu

3. ACL User screen appears.
4. The screen is bifurcated into two sections; Search for ACL User and ACL User Listing.
 - Search for ACL User - Provides a way to search ACL User details using search criteria.
 - ACL User Listing - Provides a list view of existing ACL User created in the system, including the details such as User ID, Full Name, Activating/Deactivation, and BLOCK/UNBLOCK user. Additionally, you can create, update, search, and delete ACL User and view details of an ACL User by clicking its User ID.
5. To create a new ACL User, click **Create**.

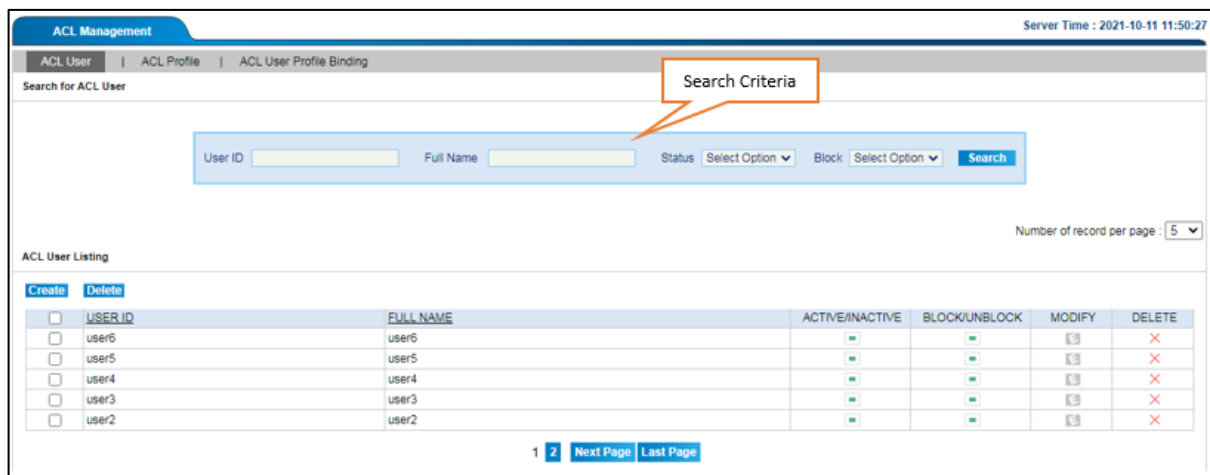



Figure 135 Create ACL User

6. Add a New ACL User screen appears.

To create a new ACL User, enter the parameters as given in the table.

Figure 136 Create ACL User

Table 42 Create ACL User parameters

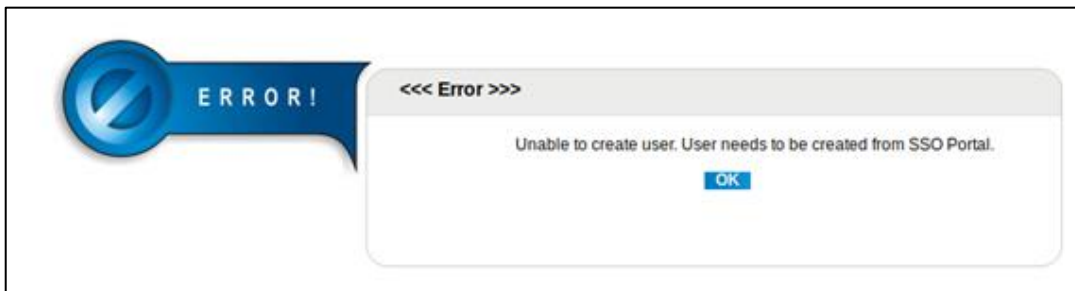
Parameters	Description
ACL User Detail	
User Name*	Enter a unique username or a unique user id for the user to be created. <div style="border: 1px solid black; padding: 5px;"> <p> Note Do not use space or punctuation.</p> </div>
Password*	Enter a password to set for the user’s login account. Set a password for the user’s account to allow access to Neox DC. It is recommended to create a password with steps below. <ul style="list-style-type: none"> Allowed characters are A-Z, a-z, 0-9, dash(-), @, dot(.) and underscore(_). Password must start and end with A-Z, a-z, or 0-9.

Parameters	Description
	<ul style="list-style-type: none"> The length of the Password must be 6 to 20 characters long. Password must combine uppercase and lowercase letters, numbers, and special characters.
Full Name	Enter a name of the user.
Phone Number	Enter a phone number of the user.
Mobile Number	Enter a mobile number of the user.
Email	Enter an email of the user.

7. Once done, click **Submit**.

Note

With SSO enabled, you cannot create the ACL user through the application. The ACL user needs to be created in the Keycloak. Clicking the **Create** option displays the following error message.



8. After you create the User, bind the user with the User Profile. Based on the selected Profile, select its associated User Group/Campaign options. Doing so, the user is bind with the selected User Group/Campaign or respective profile accordingly and can have access to that module only.

8

ACL Management Server Time : 2020-01-03 14:52:22

ACL User | ACL Profile | ACL User Profile Binding

Add a New User Profile Binding

Select ACL User:

Select ACL Profile:

User Group: ABG Inbound Outbound
 Neox Dial Center Agent Group

Campaign

Agent	Start Time	End Time
<input checked="" type="checkbox"/> Global-Offshore-Desk	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> SYNTEL-PROCESS	<input type="text"/>	<input type="text"/>

Figure 137 Add a New User Profile Binding

9.1.2 Adding a New User Profile Binding

To bind a user with the profile, enter the parameters as given in the table.

Table 43 Create ACL User parameters

Parameters	Description
Select ACL User	Select an ACL User to bind with the profile.
Select ACL Profile	Select an ACL Profile to bind user with the profile. Based on the profile selected, select its associated User Group/Campaign. The user is allowed to log in to only the selected campaign. When you select a campaign, then define Start Time and End Time. Doing so allows the Agent to log in to the campaign only at the defined time.

1. Once done, click **Submit**.

After creating an ACL user and binding with the profile, the user can login using the respective credentials. To know the login process, refer *Log in to Neox DC in Introduction to Neox Dial Center>>Neox DC Login*.

9.1.3 Updating, Searching, and Deleting ACL User

9.1.3.1 Updating ACL User

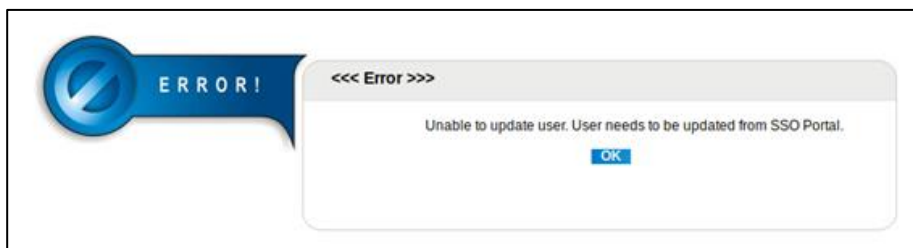
To update:

1. Click **Edit** corresponding to the ACL User on ACL User Listing.
2. Modify an ACL User screen appears.
3. Modify ACL User details, as required.
4. Click **Submit**.
5. You may delete the ACL User by clicking **Delete**.

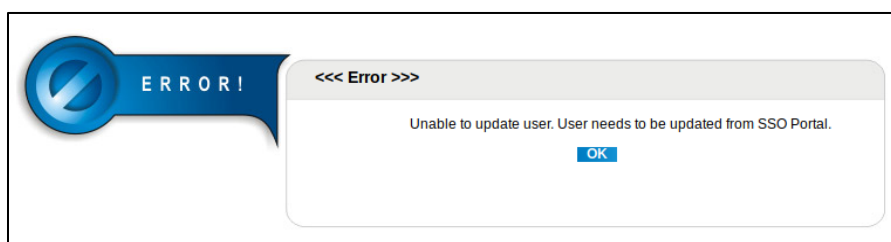
Note

With SSO enabled:

- You cannot modify the ACL user through the application. The ACL user needs to be updated in the Keycloak. Clicking the **User ID** or **Modify** option displays the following error message.



- You cannot change the status of the ACL user through the application. It needs to be changed in the Keycloak. Clicking the **Active/Inactive** option displays the following error message.



9.1.3.2 Searching ACL User

To search using filter:

1. Enter User ID/Full Name.
2. Click **Search**.
3. System returns ACL Users that contain the search term.
4. To get a list of all ACL Users, click **Search**.

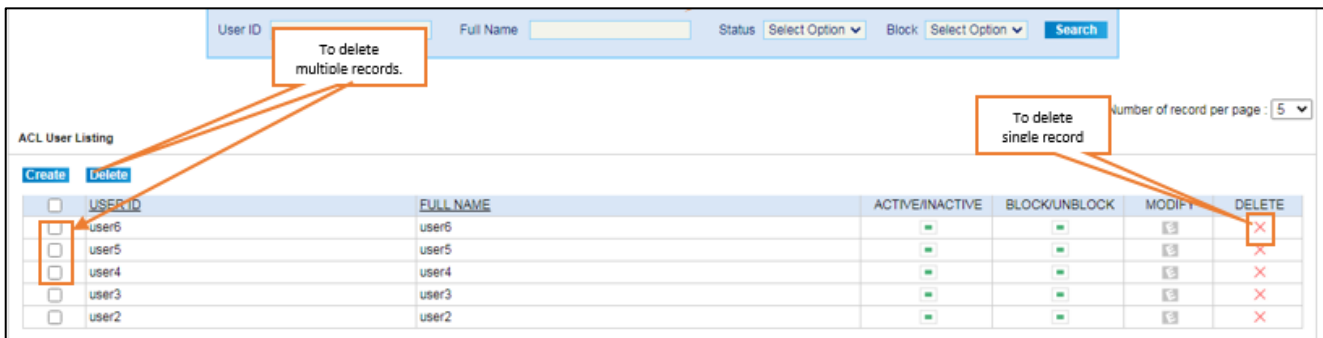
9.1.3.3 Deleting ACL Users

Neox provides two ways of deleting the ACL Users:

- Single ACL User deletion – Enables deleting a single ACL User.
 1. Select an ACL User.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple ACL Users deletion - Enables deleting multiple ACL Users.
 1. To delete multiple ACL Users, select the ACL Users OR to delete all ACL Users, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

Note

With SSO enabled, you cannot delete single or multiple users through the application. Users' needs to be deleted in the Keycloak. Clicking the **Delete** option displays the following error message.



ACL User Listing

Number of record per page : 5

<input type="checkbox"/>	USER ID	FULL NAME	ACTIVE/INACTIVE	BLOCK/UNBLOCK	MODIFY	DELETE
<input type="checkbox"/>	user6	user6	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	user5	user5	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	user4	user4	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	user3	user3	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	user2	user2	<input type="checkbox"/>	<input type="checkbox"/>		



<<< Error >>>

Unable to delete user. User needs to be deleted from SSO Portal.

OK

9.2 ACL Profile

This section provides details about ACL Profile creation that enables in creating system users' profiles for the system users to log in and access the system. ACL Profiles includes configuration to allow access to the system modules and functionalities. After creating the ACL Profile, modify it to define features and functionalities access to the profile. When the ACL Profile is created, then it is assigned to the ACL Users to define how the users can access the system.

Neox DC allows creating three types of Access Profile as following:

- **Super_Admin** - The user with Super_Admin profile has all the rights to create or change anything in existing fields/modules.
- **User_Groups** -The user with User_Groups profile has limited rights, where the user has right only on their respective user group and Campaign which is bind with the user group.
- **Campaign** -The user with Campaign profile has limited rights only on their Campaign.

To manage ACL Profile, do the following steps:

- *Creating ACL Profile*
- *Updating, Searching, and Deleting ACL Profile*

9.2.1 Creating ACL Profile

To create an ACL Profile:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **ACL Management**, and then click **ACL Profile**.



Figure 138 ACL Profile menu

3. ACL Profile screen appears.
4. The screen is bifurcated into two sections; Search for ACL Profile and ACL Profile Listing.
 - Search for ACL Profile - Provides a way to search ACL Profile details using search criteria.
 - ACL Profile Listing - Provides a list view of existing ACL Profile created in the system, including the details such as Profile Name, Profile Type, and Activating/Deactivation Profile. Additionally, you can create, update, search, and delete ACL Profile and view details of an ACL Profile by clicking its Profile Name.
5. To create a new ACL Profile, click **Create**.

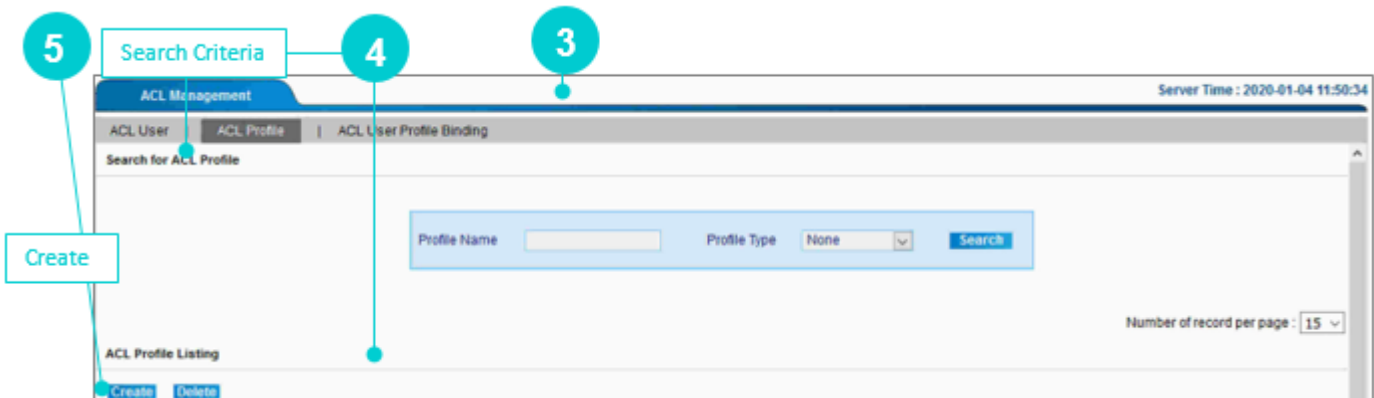


Figure 139 Create ACL Profile

6. Add a New ACL Profile screen appears.

To create a new ACL User Profile, enter the parameters as given in the table.

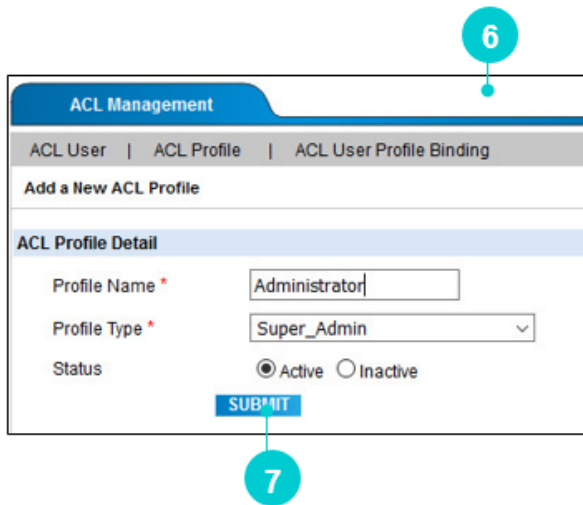



Figure 140 Create ACL Profile

Table 44 Create ACL Profile parameters

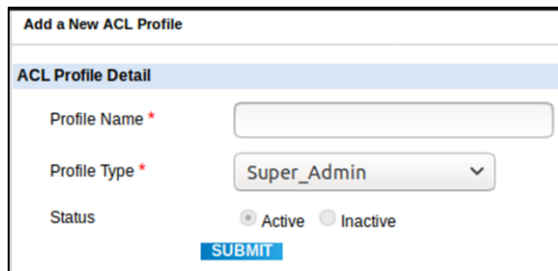
Parameters	Description
ACL Profile Detail	
Profile Name*	Enter a unique profile name to be created. <div style="border: 1px solid black; padding: 5px;"> <p> Note Do not use space or punctuation.</p> </div>
Profile Type*	Select any one profile type from the list: <ul style="list-style-type: none"> • Super_Admin • User_Groups • Campaign
Status	Select <i>Active</i> to activate the user profile.

7. Once done, click **Submit**.

8. After creating the ACL profile, modify it to give access to the features and functionalities.

 **Note**

With SSO enabled, and in astguiclient.conf file configuration, if *Is_Role_Create_On_Keycloak* => 1, a Role/Profile gets created in Keycloak during the run-time. If the value is 0, the Role/Profile gets created only in the application and not in the Keycloak. Also, the **Status** option is disabled.



Add a New ACL Profile

ACL Profile Detail

Profile Name *

Profile Type *

Status Active Inactive

SUBMIT

9.2.2 Updating, Searching, and Deleting ACL Profiles

9.2.2.1 Updating ACL Profile

To update:

1. Click **Edit** corresponding to the ACL Profile on ACL Profile Listing.
2. Modify a Profile screen appears.
3. On this screen, you can modify ACL Profile Details and perform Configuration to allow access to the modules and functionality. You can modify ACL Profile details, as required. However, you cannot modify Profile Type.
4. On the other hand, you can allow access to the system modules and functionalities.

The screenshot shows the 'Modify a Profile' interface. It features a top bar with a close button (2). Below is the 'ACL Profile Detail' section (3) with fields for Profile Name (Administrator), Profile Type (Super_Admin), and Status (Active/Inactive). The 'Configuration' section (4) includes 'Add Modules' and 'Add Functionality' buttons, and a list of modules with 'Check All' and 'Uncheck All' buttons. The '1: Number Hiding On Admin' module has a 'View' checkbox checked. The '2: Number Hiding On Dashboard' module also has a 'View' checkbox checked. At the bottom, there are 'SUBMIT' and 'DELETE' buttons.

9.2.2.1.1 Adding Modules

To allow adding modules to the ACL Profile:

1. Click **Add Modules**.
2. A list of all modules appears. In this section, you can define the actions for the modules that can be performed by the ACL Profile.

3. Select actions, such as View/Modify/Add/Delete for each module, as required or select all actions by clicking **Check All**. Based on the actions selected in this section, the user associated with this User Profile is able to perform actions on the modules.

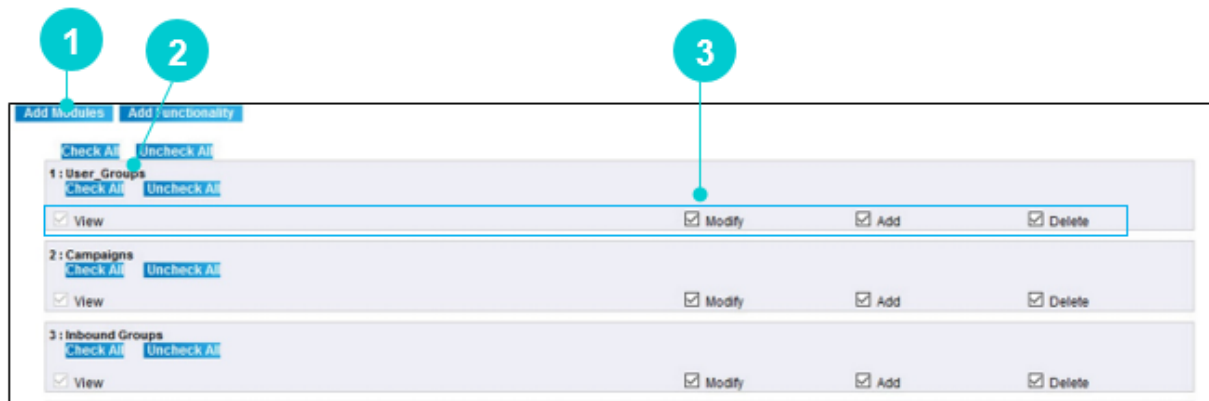


Figure 141 Add Modules

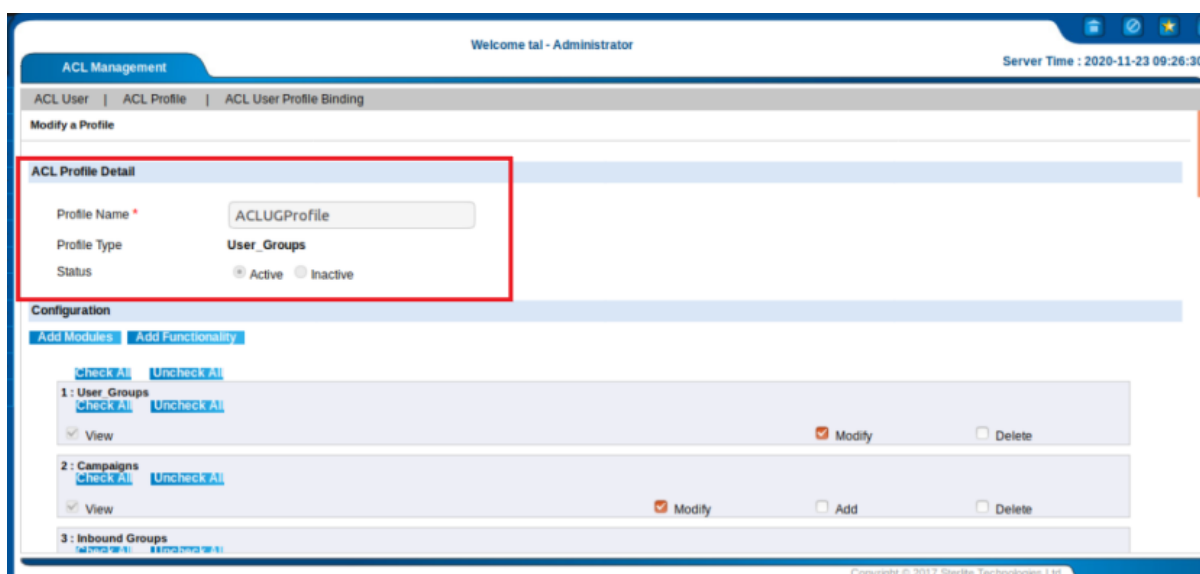
9.2.2.1.2 Adding Functionalities

In addition to modules, you can provide access to the system functionalities as follows:

1. Click **Add Functionality**.
2. Select the appropriate option
3. Click **Submit**.
4. You may delete an ACL Profile by clicking **Delete**.

Note

With SSO enabled, you can update only **Configuration** section. The **ACL Profile Detail** section is disabled and cannot be updated. Refer to the highlighted section in the below figure. You can update this information through Keycloak.



9.2.2.2 Searching ACL Profile

To search using filter:

1. Enter Profile Name or select Profile Type.
2. Click **Search**.
3. System returns ACL Profiles that contain the search term.
4. To get a list of all ACL Profiles, click **Search**.

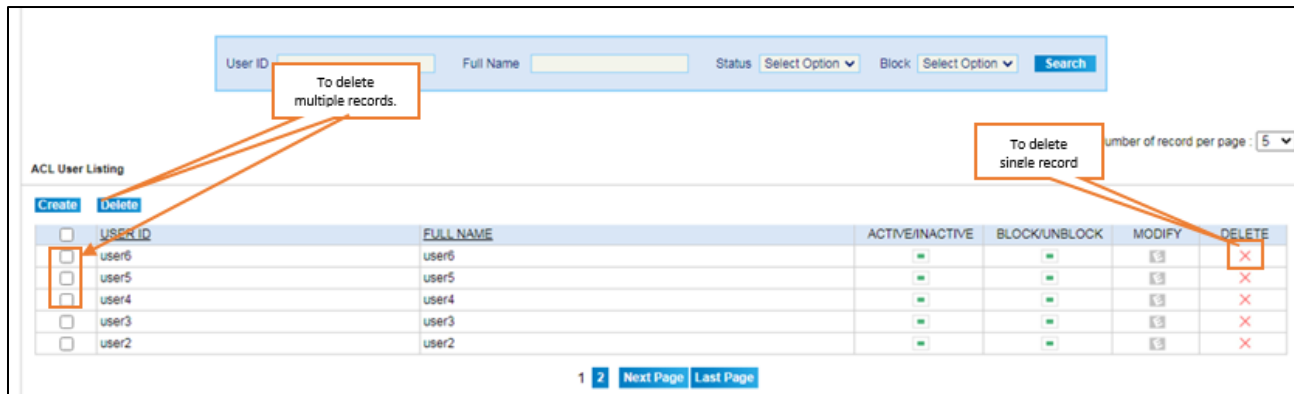
9.2.2.3 Deleting ACL Profiles

Neox provides two ways of deleting the ACL Profiles:

- Single ACL Profile deletion – Enables deleting a single ACL Profile.
 1. Select an ACL Profile.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple ACL Profiles deletion - Enables deleting multiple ACL Profiles.
 1. To delete multiple ACL Profiles, select the ACL Profiles OR to delete all ACL Profiles, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

 **Note**

- *With SSO enabled*, and in `astguiclient.conf` file configuration, if `Is_Role_Create_On_Keycloak => 1`, you cannot delete a single or multiple ACL Profiles through the application. The ACL Profile needs to be deleted in the Keycloak. Clicking the **Delete** option displays the following error message.




- *With SSO enabled* and in `astguiclient.conf` file configuration, if `Is_Role_Create_On_Keycloak => 0`, you can delete User Profile/Role in the application. However, the same is not deleted in the Keycloak. If the same user tries to log in to the application, the system will display an appropriate error message.

9.2.3 ACL User Profile Binding

This section provides details about ACL User Profile Binding that enables the administrator to bind the ACL User with the ACL Profile. Doing so, ACL User is able to log in to the system and perform the designated operations on the assigned modules, as defined in their profile.

To manage ACL User Profile Binding, do the following steps:

- *Creating ACL User Profile Binding*
- *Updating, Searching, and Deleting ACL User Profile Binding*

9.2.4 Creating ACL User Profile Binding

To create an ACL User Profile Binding:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **ACL Management**, and then click **ACL Profile**.



Figure 142 ACL User Profile Binding menu

3. ACL Profile screen appears.
4. The screen is bifurcated into two sections; Search for User Profile Binding and User Profile Binding Listing.
 - Search for User Profile Binding - Provides a way to search User Profile Binding details using search criteria.
 - User Profile Binding Listing - Provides a list view of existing User Profile Binding created in the system, including the details such as ACL User and ACL Profile. Additionally, you can create, update, search, and delete User Profile Binding and view details of an ACL User by clicking its Name.
5. To create a new ACL User Profile Binding, click **Create**.

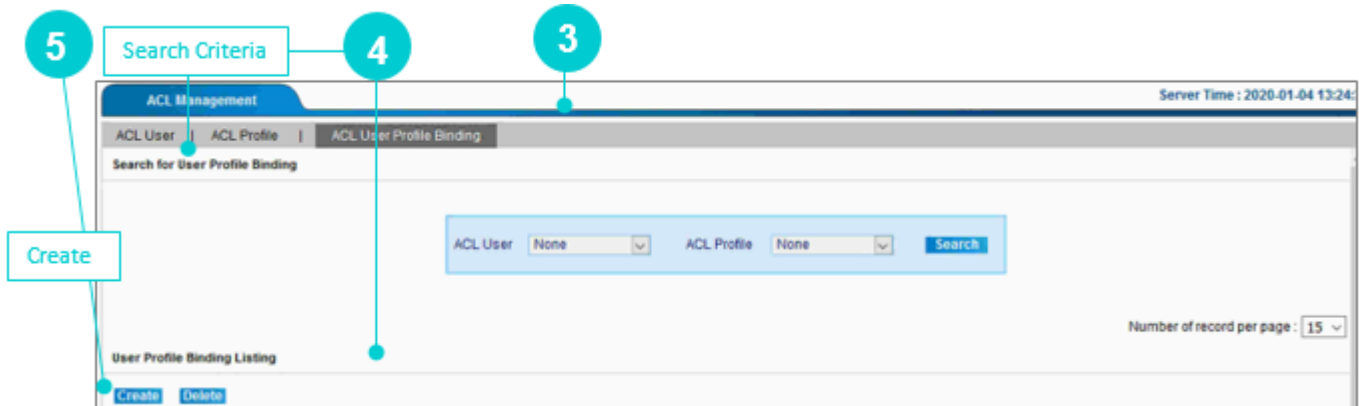


Figure 143 Create ACL User Profile Binding

6. Add a New User Profile Binding screen appears.

To create a new User Profile Binding, enter the parameters as given in the table.

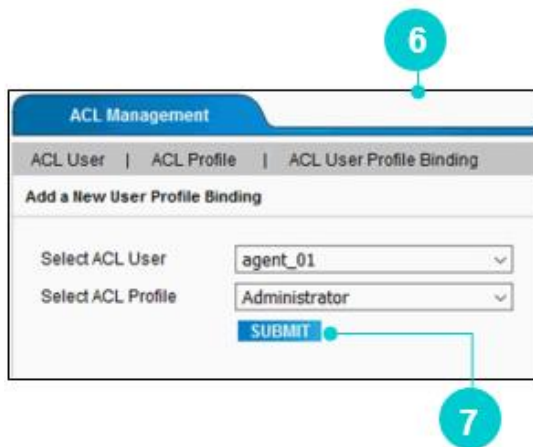


Figure 144 Create User Profile Binding

Table 45 Create User Profile Binding parameters

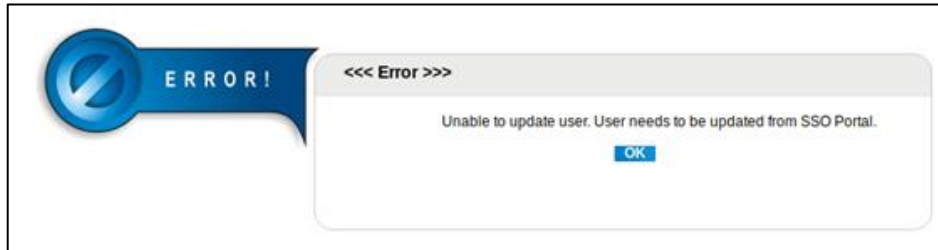
Parameters	Description
Select ACL User	Select an ACL User to bind it with the ACL Profile. This list contains the ACL Users created from <i>ACL Management>>ACL User</i> .
Select ACL Profile	Select any one profile from the list. This list contains the ACL Profiles created from <i>ACL Management>>ACL Profile</i> . After selecting an ACL Profile, all its associated User Groups are displayed. <div data-bbox="464 1341 1251 1816" data-label="Image"> </div>

Figure 145 ACL User Profile Binding

7. Once done, click **Submit**.

 **Note**

With SSO enabled, you cannot create the ACL Profile binding. It needs to be created in the Keycloak. Clicking the **Create** option displays the following error message.



9.2.5 Updating, Searching, and Deleting User Profile Binding

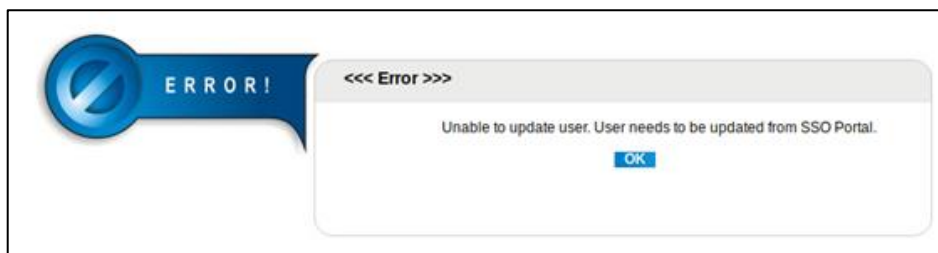
9.2.5.1 Updating User Profile Binding

To update:

1. Click **Edit** corresponding to the User Profile Binding on User Profile Binding Listing.
2. Modify a User Profile Binding screen appears.
3. Modify details as required.
4. Once done, click **Submit**.

Note

With SSO enabled, you cannot modify the ACL Profile binding. It needs to be updated in the Keycloak. Clicking the **ACL User or Modify** option displays the following error message.



9.2.5.2 Searching User Profile Binding

To search using filter:

1. Select ACL User/ACL Profile.
2. Click **Search**.
3. System returns User Profile Binding details that contain the search term.
4. To get a list of all User Profile Binding, click **Search**.

9.2.5.3 Deleting User Profile Binding

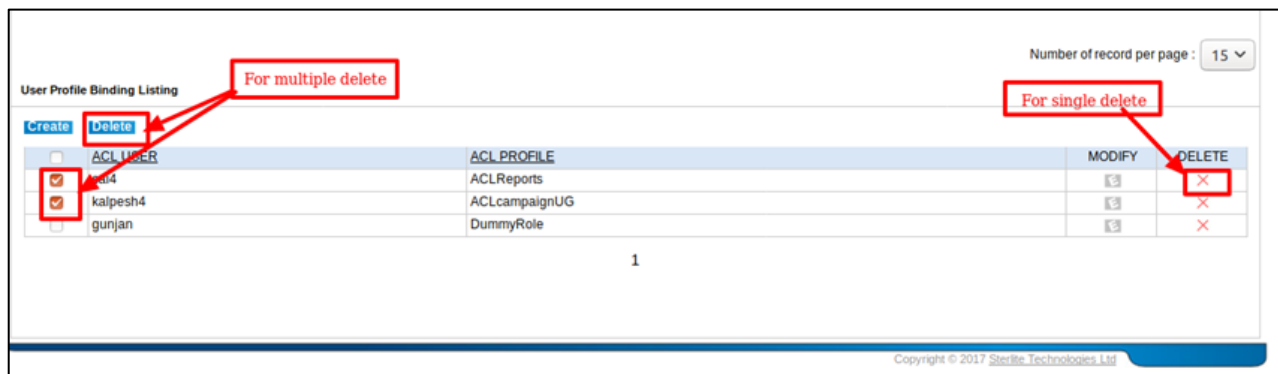
Neox provides two ways of deleting the User Profile Binding:

- Single User Profile Binding deletion – Enables deleting a single User Profile Binding.
 1. Select a User Profile Binding.
 2. Click **Delete**.
 3. Click **Ok** to confirm.

- Multiple User Profile Binding deletion - Enables deleting multiple User Profile Binding.
 1. To delete multiple User Profile Binding, select the User Profile Binding OR to delete all User Profile Binding, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

Note

With SSO enabled, you cannot delete a single or Multiple ACL User Profile binding. It needs to be deleted in the Keycloak. Clicking the **Delete** option displays the following error message.



Number of record per page : 15 ▾

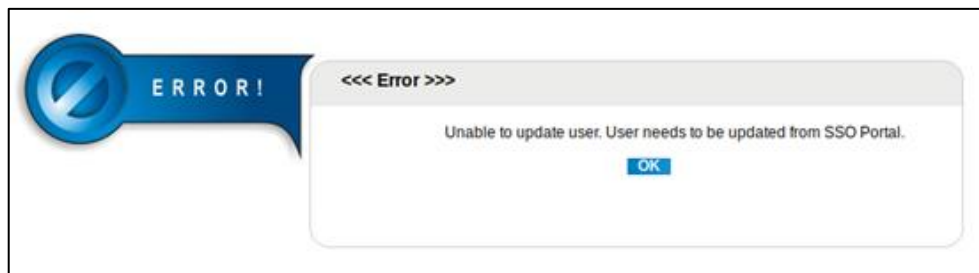
User Profile Binding Listing

Create Delete

ACL USER	ACL PROFILE	MODIFY	DELETE
kal4	ACLReports		
kalpesh4	ACLcampaignUG		
gunjan	DummyRole		

1

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ERROR!

<<< Error >>>

Unable to update user. User needs to be updated from SSO Portal.

OK

10. Reports Management

This chapter provides information of various Reports, where you can get view reports of Agents, let's say to determine the performance, Inbound and Outbound reports, Call Details Reports (CDR) and Voice Blaster CDR Reports to analyze calls, and other Advanced and Audit Reports. You can download reports, schedule reports, and play and download call records.

Note

It is important to note that the total time in calls can be different from the total time an agent is logged in.

Contents:

- *Agents Reports*
- *Inbound Reports*
- *Outbound Reports*
- *Call CDR Report*
- *Voice Blaster CDR Report*
- *Advance Reports*
- *Audit Report*

10.1 Agent Reports

This section provides information about Agent Reports that enables you to view the details of the Agent's Performance, Activity, Call Summary, and Break Bifurcation through the various types of reports. The Reports are available to view the agent's details for the selected time period, campaigns, and user groups and so on. You can download reports in CSV, PDF, and Excel format.

Following Agent Reports are available:

- *Agent Performance Report*
- *Agent Activity Report*
- *Agent Call Summary Report*
- *Agent Break Bifurcation Report*

10.1.1 Agent Performance Report

This section provides information about Agent Performance Report that offers a detailed summary of an Agent's Activity. You can view the report for the selective time period that contains information of Calls, Log in and Log out, Pause Codes, Disposition, Average Rank and Human and Non-Human Answered Calls. You can also view reports of the selective Campaigns and User Groups Agent.

Along with the talk time, this gives a full breakdown of all Agents' time on the campaign for that shift. Filters are provided based on Date (Start date to End date) and Time (From Time and To Time), Campaigns – The Agent belongs to, User Groups of the Agent, and the Shifts – In which Agents work to make the reports more explicit and distinctive. Additionally, you can schedule a report and download when required.

To view the Agent Performance Report, do the following:

- *Viewing Agent Performance Report*
- *Scheduling Agent Performance Report*
- *Downloading Agent Performance Report*

10.1.1.1 Viewing Agent Performance Report

Set the search criteria to view the report for the selective time period, campaign, and user group. This report is generated only after the agent finishes a call.

To view Agent Performance Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Agent Reports**, and then click **Agent Performance Report**.

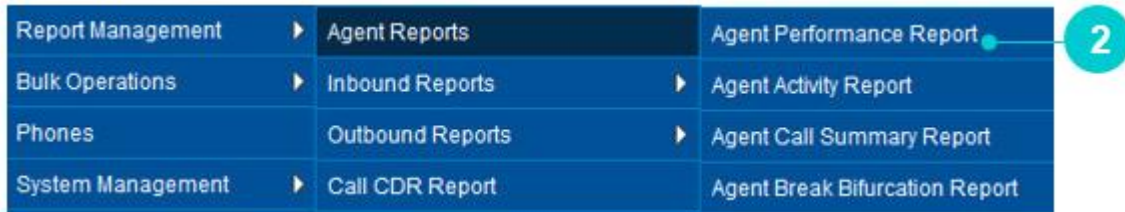


Figure 146 Agent Performance Report menu

3. Billing Record screen appears.
4. The screen is bifurcated into three sections; Agent Performance Report Filter, Email Report Configuration Details, and Agent Performance Detail.
 - Agent Performance Report Filter - Provides a way to search Agent Performance using search criteria, such as Time, Campaigns, and User Group.
 - Email Report Configuration Details – Provides a way to schedule email to get report and a list view of all scheduled reports.

- Agent Performance Detail List – Provides a list view of Agent Performance report, in addition to downloading CSV, PDF, and Excel formats of report.

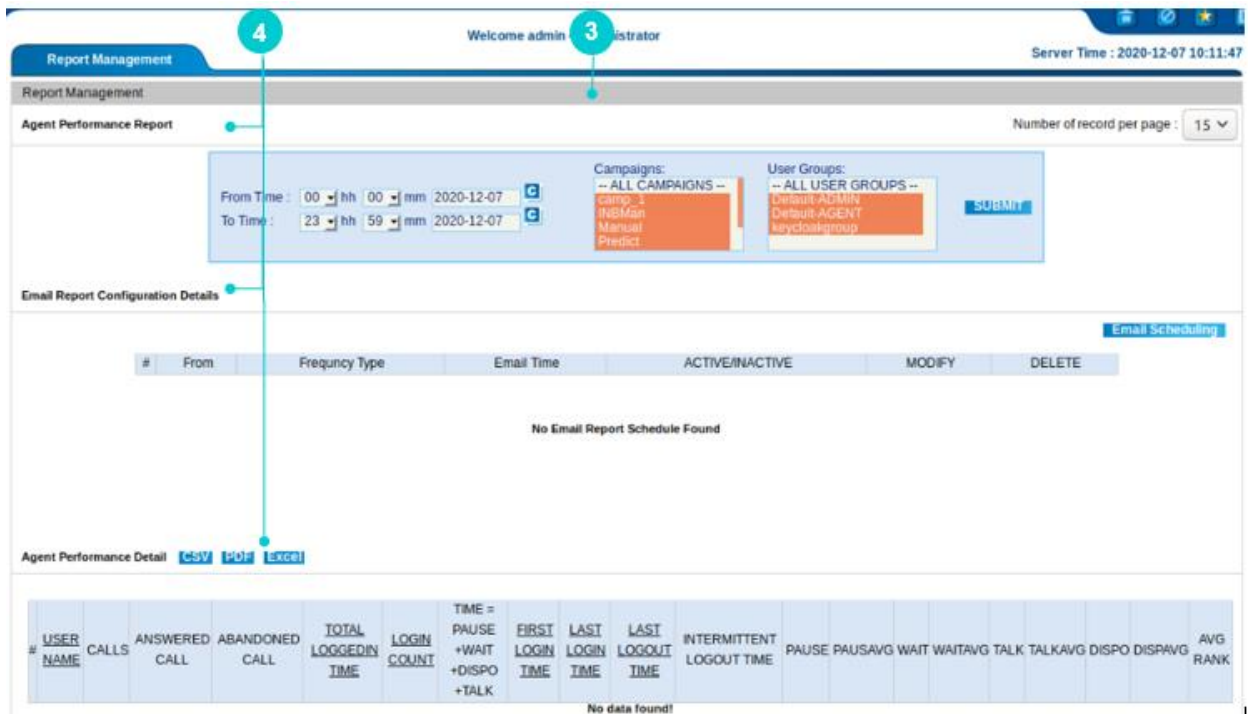


Figure 147 Agent Performance Report

5. Use the search filters, such as select date and time to view the report of the selected duration, campaign and user group.
6. Click **Submit**.
7. Agent Performance Report is generated using the search criteria.
 - a. The column headers with underline formatting indicate that they are clickable, and clicking them displays the report in ascending and descending order of the values in that particular column. To do so, click on the column header. For example, USERNAME.
 - b. Clicking on the USERNAME displays the report based on the ascending order of usernames.

#	<u>USER NAME</u>	CALLS	ANSWERED CALL	ABANDONED CALL	TOTAL LOGGEDIN TIME	LOGIN COUNT	TIME = PAUSE +WAIT +DISPO +TALK	FIRST LOGIN TIME	LAST LOGIN TIME	LAST LOGOUT TIME	INTERMITTENT LOGOUT TIME	PAUSE	PAUSAVG	WAIT	WAIT
1	agent1	0	0	0	0:02:20	1	0:02:20	2020-11-30 09:38:25	2020-11-30 09:38:25	2020-11-30 09:40:45	00:00:00	0:02:20	00:00:00	00:00:00	00:00:00
2	sai4001	30	28	2	25:02:55	16	7:21:30	2020-11-09 21:15:48	2020-11-18 11:51:53	2020-11-18 23:59:47	193:41:04	0:06:16	0:00:13	4:09:46	0:08
3	sai4002	21	15	6	2:39:27	22	2:36:35	2020-11-10 11:51:22	2020-11-10 15:31:51	2020-11-10 15:32:40	1:01:51	1:08:58	0:03:17	0:17:00	0:00
4	sai4003	7	7	0	4:15:03	9	4:14:29	2020-11-10 15:34:42	2020-11-10 19:51:05	2020-11-10 20:05:48	0:16:03	0:02:24	0:00:21	3:22:16	0:28
5	U9001	44	2	42	8:30:32	40	4:22:28	2020-11-11 18:29:47	2020-12-07 10:15:54	2020-12-07 10:16:31	607:16:12	2:19:36	0:03:10	1:04:51	0:01
6	U9002	7	0	7	0:46:55	28	0:46:50	2020-11-13 15:10:10	2020-11-13 16:01:03	2020-11-13 16:03:27	0:06:22	0:12:57	0:01:51	0:31:34	0:04
	AGENTS:6	109	52	57	41:17:12	116	19:24:12	-	-	-	802:21:32	3:52:31	0:02:08	9:25:27	0:05

- c. Clicking the USERNAME again displays the report based on the descending order of usernames.

#	<u>USER NAME</u>	CALLS	ANSWERED CALL	ABANDONED CALL	TOTAL LOGGED IN TIME	LOGIN COUNT	TIME = PAUSE +WAIT +DISPO +TALK	FIRST LOGIN TIME	LAST LOGIN TIME	LAST LOGOUT TIME	INTERMITTENT LOGOUT TIME	PAUSE	PAUSAVG	WAIT	WAIT
1	U9002	7	0	7	0:46:55	28	0:46:50	2020-11-13 15:10:10	2020-11-13 16:01:03	2020-11-13 16:03:27	0:06:22	0:12:57	0:01:51	0:31:34	0:04
2	U9001	44	2	42	8:30:32	40	4:22:28	2020-11-11 18:29:47	2020-12-07 10:15:54	2020-12-07 10:16:31	6:07:16:12	2:19:36	0:03:10	1:04:51	0:01
3	sai4003	7	7	0	4:15:03	9	4:14:29	2020-11-10 15:34:42	2020-11-10 19:51:05	2020-11-10 20:05:48	0:16:03	0:02:24	0:00:21	3:22:16	0:28
4	sai4002	21	15	6	2:39:27	22	2:36:35	2020-11-10 11:51:22	2020-11-10 15:31:51	2020-11-10 15:32:40	1:01:51	1:08:58	0:03:17	0:17:00	0:00
5	sai4001	30	28	2	25:02:55	16	7:21:30	2020-11-09 21:15:48	2020-11-18 11:51:53	2020-11-18 23:59:47	193:41:04	0:06:16	0:00:13	4:09:46	0:08
6	agent1	0	0	0	0:02:20	1	0:02:20	2020-11-30 09:38:25	2020-11-30 09:38:25	2020-11-30 09:40:45	00:00:00	0:02:20	00:00:00	00:00:00	00:00
AGENTS:6		109	52	57	41:17:12	116	19:24:12	-	-	-	802:21:32	3:52:31	0:02:08	9:25:27	0:05

Note

Clicking on the column headers with underline formatting in the Report section displays the report based on the ascending/descending values in that particular column. This functionality remains the same for all reports in the Report Management module.

The screenshot shows the 'Agent Performance Report' interface. Callout 5 points to the 'From Time' and 'To Time' filters. Callout 6 points to the 'Submit' button. Callout 7 points to the 'Agent Performance Detail' table. The table has columns for user name, calls, answered calls, abandoned calls, total logged in time, login count, time spent, and various time metrics. The table is currently empty, showing only the header row.

Figure 148 Agent Performance Report

Table 46 Agent Performance Report Parameters

Parameters	Description
User Name	Agent name who has logged in the system and handled the calls.
Calls	Number of calls the agent has received. These calls are a summation of answered + abandoned calls.
Answered Calls	Number of calls answered by the agent.
Abandoned calls	Number of calls the agent left unanswered (unattended).
Total Logged in time	The time duration when the agent has logged in. This includes pause + wait + dispo + talk + call connection time.
Login count	Number of times the agent has logged in the filtered time period.
Time (Pause+wait+dispo+talk)	Time in which the agent was in pause state + wait state + dispo state + talk state.
First login time	The time and date when the agent has first logged in.
Last login time	The time and date when the agent has last logged in.
Last logout time	The time and date when the agent has last logged out.
Intermittent logout time	The total time duration between two logins of the agents.
Pause	The total time when the agent was in pause state.
Pause Avg	The average time when the agent was in pause state. This is done by dividing the pause time with the total number of calls.
Wait	Total time when the agent was in wait state.
Wait Avg	The average time when the agent was in wait state. This is done by dividing the wait time with the total number of calls.
Talk	Total time when the agent was in talk state.
Talk Avg	The average time when the agent was in talk state. This is done by dividing the talk time with the number of answered calls.
Dispo	Total time when the agent was in disposition state.
Dispo Avg	Average time when the agent was in disposition state. This is done by dividing the disposition time with the total number of calls.
AVG Rank	Displays the average ranks of the agent as received by the administrator based on the customer's experience through call recording. For example, if ranks for calls are as following: call 1 = 2 call 2 = 3

Parameters	Description
	<p>The average rank will be 2.5 (rank of call 1 + rank of call 2)/total number of ranked calls.</p> <p>Additionally, the total of all ranks are displayed when multiple agents are available.</p> <p>This rank is also displayed on the agent's home screen.</p>
Human Answered	This field is further divided into disposition status like NI (Not Interested), XFER (Transfer), and DNC (Do Not Call), SALE. The number of answered calls are divided among this disposition status which was selected during the call.
Non-Human Answered	This field is further divided into disposition status like DROP, SKIP DISPO, NA (Not Available), UA (Unanswered) and so on. The number of answered calls are divided among this disposition status which was selected during the call.

10.1.1.2 Scheduling Agent Performance Report

You can also schedule the report to get it Daily, Weekly or Monthly.

To schedule report:

1. Select the search criteria.
2. Click **Email Scheduling** in Email Report Configuration Details.
3. Add Email Configuration screen appears. Enter the parameters as given in the table.

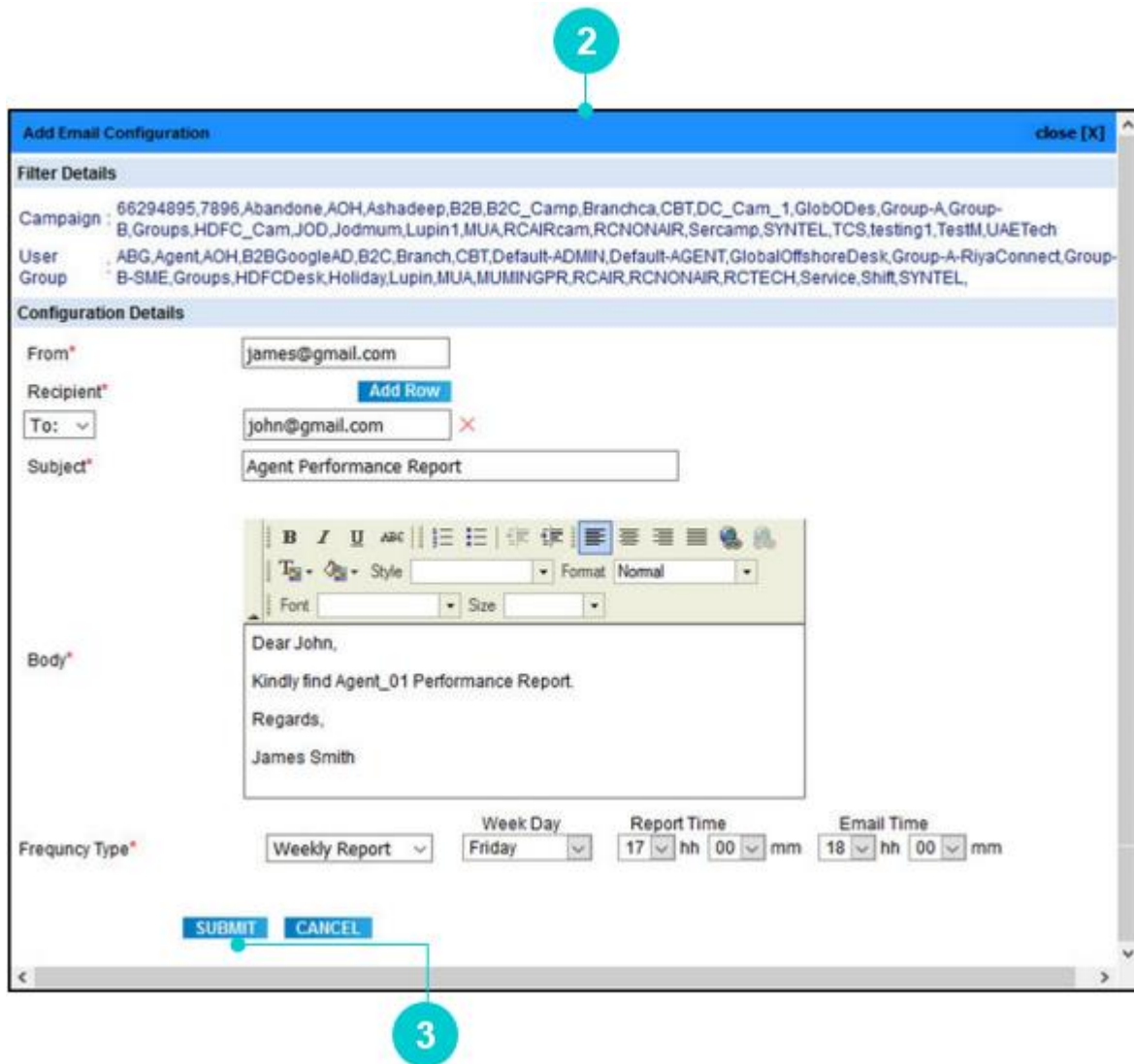


Figure 149 Configure Report

Table 47 Agent Performance Report

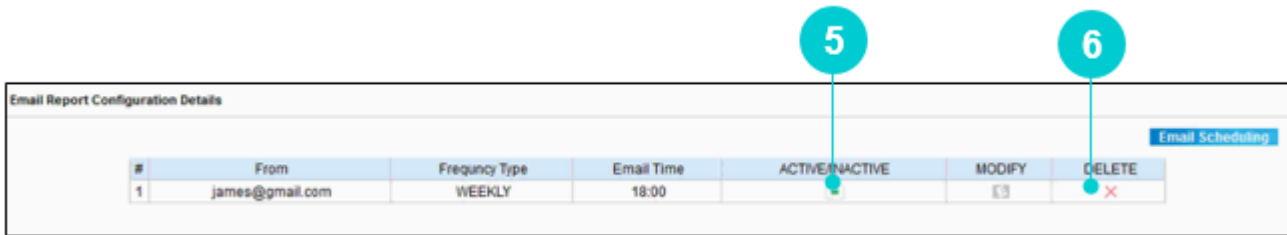
Parameters	Description
Filter Details	
Filters	Displays the filters applied to view the report.
Configuration Details	
From*	Enter the sender’s email address.
Recipient*	Enter the email id of the recipient to whom you want to send the email. If you want to send the email to multiple recipients, then click Add Row .
Cc, Bcc*	<ul style="list-style-type: none"> Cc: If you want to send a copy of the email to a recipient and want everyone to see it, then enter a recipient email id in this field.

Parameters	Description
	<ul style="list-style-type: none"> Bcc: If you want to send a copy of the email to a recipient and do not want anyone to see it, then enter a recipient email id in this field.
Subject*	Enter a brief subject line to provide information about the email to its recipient.
Body*	Enter all supporting information in this section.
Frequency Type*	<p>Select a frequency type to receive the email.</p> <ol style="list-style-type: none"> Daily Report In Daily Report email configuration, you can configure email to get the report every day, after a specific time, and it contains data only from the start time and stop time. For example, if the start time is 12:00 and the stop time is 23:00, then the report contains data collected between the configured times, say 12:00 and 23:00, and the system generates and emails report after 23:00. Select Email Time to get the report in the selected time. Weekly Report In Weekly Report email configuration, you can configure email to get the report at every week, after a specific time, and it contains data only from the previous week. For example, email is configured on Monday at 13:00, then the report contains data collected from the previous week, and the system generates and emails after 13:00, on every Monday. Select Email Time to get the report in the selected time. Monthly Report In the Monthly Report email configuration, you can configure email to get the report every month, after a specific date and time, and it contains data only from the previous month. For example, email is configured on the 1st of the month at 13:00, then the report contains data collected from the previous month, and system generates and emails report after 13:00 on every 1st of the month. Select Email Time to get the report in the selected time.

4. Click **Submit** to schedule report.

5. You can activate/deactivate the scheduled report, by clicking in **Active/Inactive**.

6. You can also modify the report by clicking **Edit** and delete the report by clicking **Delete**.



The screenshot shows a table titled "Email Report Configuration Details" with a table header and one data row. The table has columns for #, From, Frequency Type, Email Time, ACTIVE/INACTIVE, MODIFY, and DELETE. A callout '5' points to the ACTIVE/INACTIVE column, and a callout '6' points to the DELETE column. A button labeled "Email Scheduling" is located in the top right corner of the table area.

#	From	Frequency Type	Email Time	ACTIVE/INACTIVE	MODIFY	DELETE
1	james@gmail.com	WEEKLY	18:00			

Figure 150 Email Report Configuration Details

10.1.1.3 Downloading Agent Performance Report

To download Agent Performance Report:

1. Click **CSV** to download in CSV format.
2. Click **PDF** to download in PDF format.
3. Click **Excel** to download in Excel format.

In all cases, save the report in your local disk drive.



Figure 151 Download Report

10.1.2 Agent Activity Report

This section provides information about Agent Activity Report that provides you the information of Agent Talk Time and Status, and other activities of the Agent. The report comprises of the details such as: Agent's name, extension, Campaign Name, User Group Name, Date and Logged in Duration. You can also view Transition details for a specific logged in duration. This report gives more clarity on how an agent's time is being spent as compared to other agents.

To view the Agent Activity Report, do the following:

- *Viewing Agent Activity Report*
- *Accessing Transition Details*

10.1.2.1 Viewing Agent Activity Report

Set the search criteria to view the report for the selective time period and agent. This report is generated only after a call is finished by the agent.

To view Agent Activity Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Agent Reports**, and then click **Agent Activity Report**.

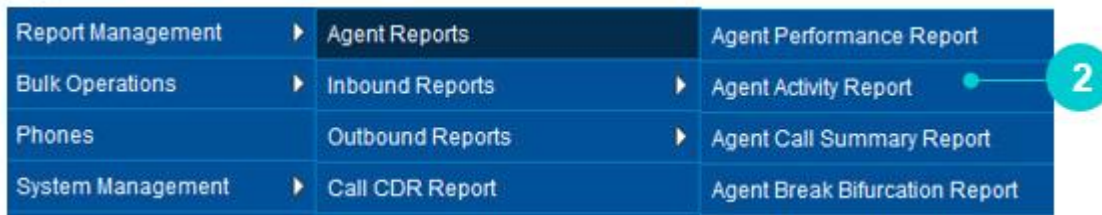


Figure 152 Agent Activity Report menu

3. Agent Activity Report screen appears.
4. The screen is bifurcated into three sections; Agent Activity Report Filter, Email Report Configuration Details, and Agent Talk Time and Status.
 - Agent Activity Report Filter - Provides a way to search Activity Report using search criteria, such as Time and User name.
 - Email Report Configuration Details – Provides a way to schedule email to get the report and a list view of all scheduled reports.
 - Agent Talk Time and Status – Provides a graphical representation of agent’s talk time through the Pie Chart for the agent’s talk time with each call statuses and total count of talk time.
 - Agent Activity For This Time Period - Provides a list view of Agent Performance report and transition details, in addition to downloading CSV and Excel formats of report.

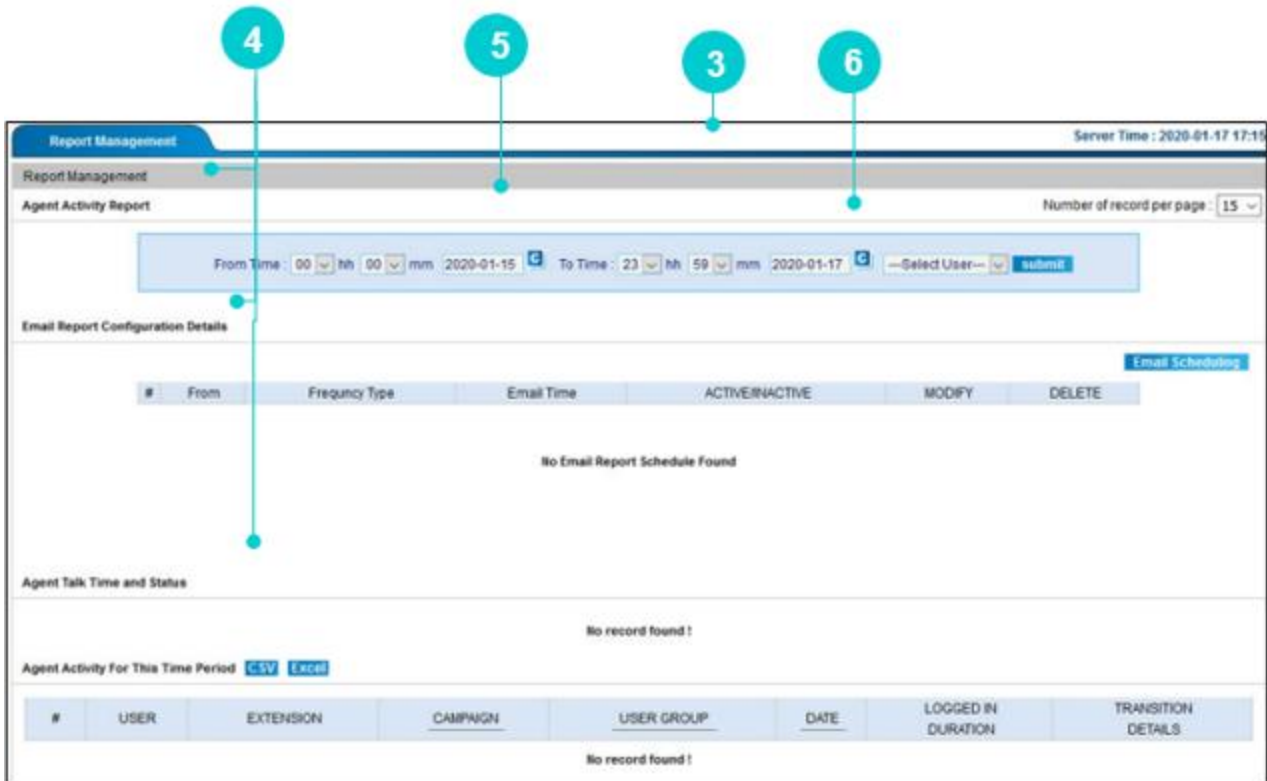


Figure 153 Agent Activity Report

5. Use the search filters, such as select date and time to generate the report of the selected duration and user.
6. Click **Submit**.
7. Agent Activity Report is generated based on the search criteria.

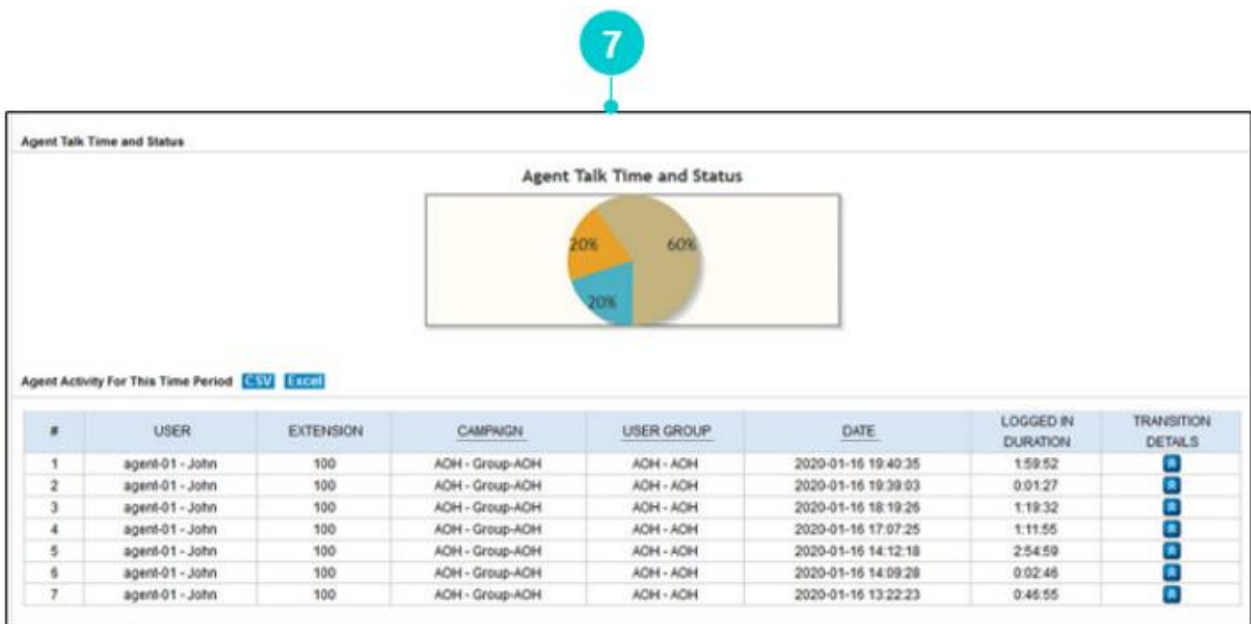


Figure 154 Agent Performance Report

Agent Talk Time and Statuses

1. You can view the agent's talk time and its statuses through the pie chart. The Pie Chart gives an insight into the talk time and status.

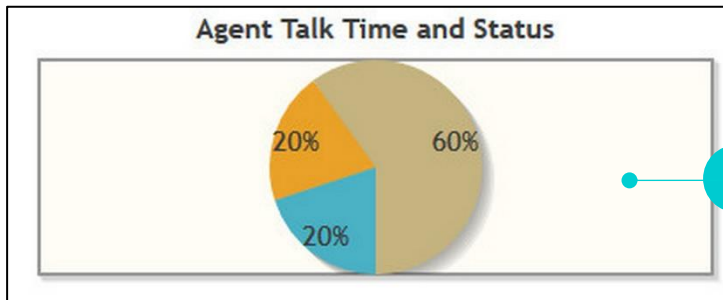


Figure 155 Agent Talk Time and Status

2. When you click the Pie Chart, you get detailed information of all talk time with the status. The talk time statuses include Disposition status such as Answering Machine, Call Back and Time Based Disposition Fail Calls status with their count and total count of all talk time types.
3. Click on the pie chart again to close the pie chart.

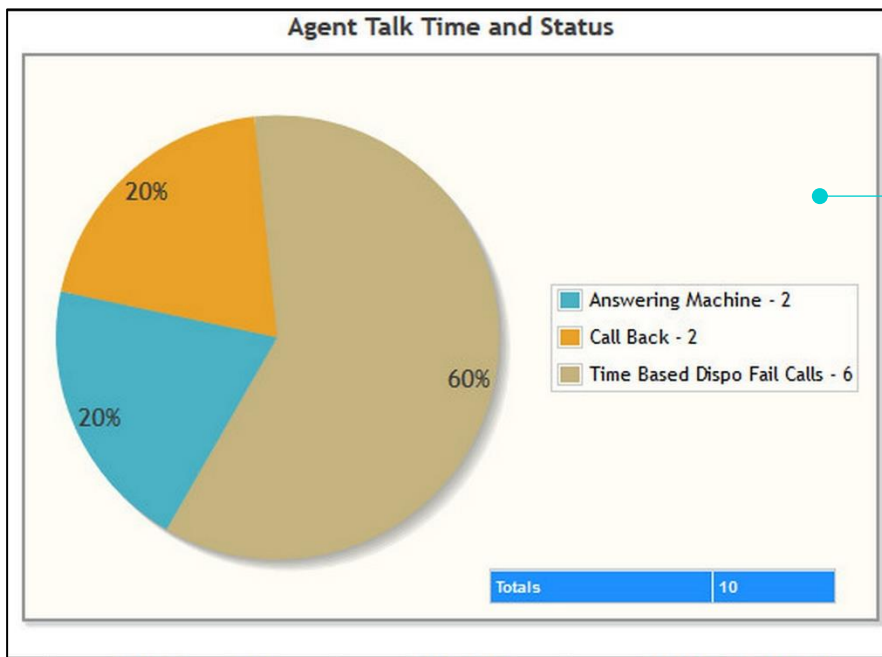


Figure 156 Detailed information

4. Additionally, you can schedule and download reports.

10.1.2.2 Accessing Transition Details

After the report is generated, transition detail of each user is provided by the system

1. To view Transition Details of the user for specific time duration.
2. Click on Transition Details column.
3. You will get transition details of the specific user from the log in time to the log out time.

#	USER	EXTENSION	CAMPAIGN	USER GROUP	DATE	LOGGED IN DURATION	TRANSITION DETAILS
1	agent-01 - John	100	ADH - Group-ADH	ADH - ADH	2020-01-16 19:40:35	1:59:52	

#	DATE/TIME	EVENT	PAUSE CODE	PAUSE DURATION	PREVIEW DURATION	WAIT DURATION	DIALING DURATION	TALK DURATION	DISPO DURATION	STATUS
1	2020-01-16 19:40:35	LOGIN		-	-	-	-	-	-	
2	2020-01-16 19:40:35	PAUSE		-	-	-	-	-	-	
3	2020-01-16 19:40:48	DIALING		0:00:13	-	-	-	-	-	
4	2020-01-16 19:40:48	DISCONN		-	-	-	-	-	-	
5	2020-01-16 19:41:39	DISPO		-	-	-	-	-	0:00:51	CALLBK
6	2020-01-16 19:41:39	RESUME		-	-	-	-	-	-	
7	2020-01-16 19:42:51	PAUSE	CALL BACK	-	-	0:01:12	-	-	-	
8	2020-01-16 19:42:57	DIALING		0:00:06	-	-	-	-	-	
9	2020-01-16 19:42:57	DISCONN		-	-	-	-	-	-	
10	2020-01-16 19:44:07	DISPO		-	-	-	-	-	0:01:10	CALLBK
11	2020-01-16 19:44:07	RESUME		-	-	-	-	-	-	
12	2020-01-16 19:44:26	PAUSE	CALL BACK	-	-	0:00:19	-	-	-	
13	2020-01-16 19:44:45	PREVIEW		0:00:19	-	-	-	-	-	
14	2020-01-16 19:44:55	DIALING		-	0:00:10	-	-	-	-	
15	2020-01-16 19:44:55	DISCONN		-	-	-	-	-	-	
16	2020-01-16 19:46:12	DISPO		-	-	-	-	-	0:01:17	TBDFC
17	2020-01-16 19:46:13	RESUME		-	-	-	-	-	-	
18	2020-01-16 19:57:07	PAUSE		-	-	0:10:54	-	-	-	
19	2020-01-16 20:54:38	PAUSE		-	-	0:57:31	-	-	-	
20	2020-01-16 21:40:27	LOGOUT		0:07:56	-	-	-	-	-	
(in HH:MM:SS)				0:08:34	0:00:10	1:09:56	00:00:00	00:00:00	0:03:18	

Figure 157 Transition Time

Table 48 Agent Activity Report Parameters

Parameters	Description
DATE/TIME	The date and time of the event action done by the agent.
EVENT	The events like login, pause, resume, dialing, in call, and on. “Dialing” is the common event use for Inbound Calling (Agent phone Ring) and Outbound calling (Customer phone Ring).
PAUSE CODE	Name of the Pause Code selected by the agent while clicking pause.
PAUSE DURATION	The time duration when agent is paused.
PREVIEW DURATION	The time duration taken by the agent to preview the lead.
WAIT DURATION	The time duration when the agent is ready but not on call.
DIALING DURATION	The time duration when the agent initiated the call, but not connected to the customer.

Parameters	Description
TALK DURATION	The time duration when the agent is in call with a customer.
DISPOSITION DURATION	The time duration taken by the agent to dispose a call.
STATUS	The disposition status of the call. If blank, then the call is auto disposed.

10.1.3 Agent Call Summary Report

This section provides information about Agent Call Summary Report that provides a quick summary of agent's details such as name, total number inbound and outbound calls and average minimum and maximum talking time. This helps you in understanding the hotlines when you are getting most calls or make calls as required, or which agent is handling more calls and so on.

To view the Agent Call Summary Report, do the following:

- *Viewing Agent Call Summary Report*

10.1.3.1 Viewing Agent Call Summary Report

Set the search criteria to view the report for the selective time period and user group. This report is generated only after the agent finishes a call.

To view the Agent Call Summary Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Agent Reports**, and then click **Agent Call Summary Report**.

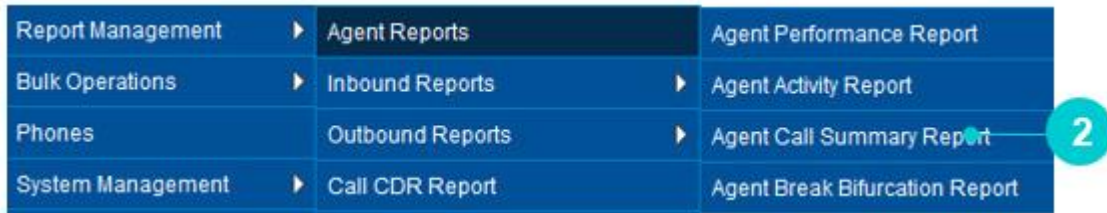


Figure 158 Agent Call Summary Report menu

3. Agent Call Summary Report screen appears.
4. The screen is trifurcated into three sections; Agent Call Summary Report Filter, Email Report Configuration Details, and Agent Call Summary Details.
 - Agent Call Summary Report - Provides a way to search Agent Call Summary Report using search criteria, such as Time and User Group.
 - Email Report Configuration Details – Provides a way to schedule email to get the report and a list view of all scheduled reports.
 - Agent Call Summary Details - Provides a list view of inbound and outbound calls handled by the agent with the average call time, in addition to downloading CSV, PDF, and Excel formats of report.

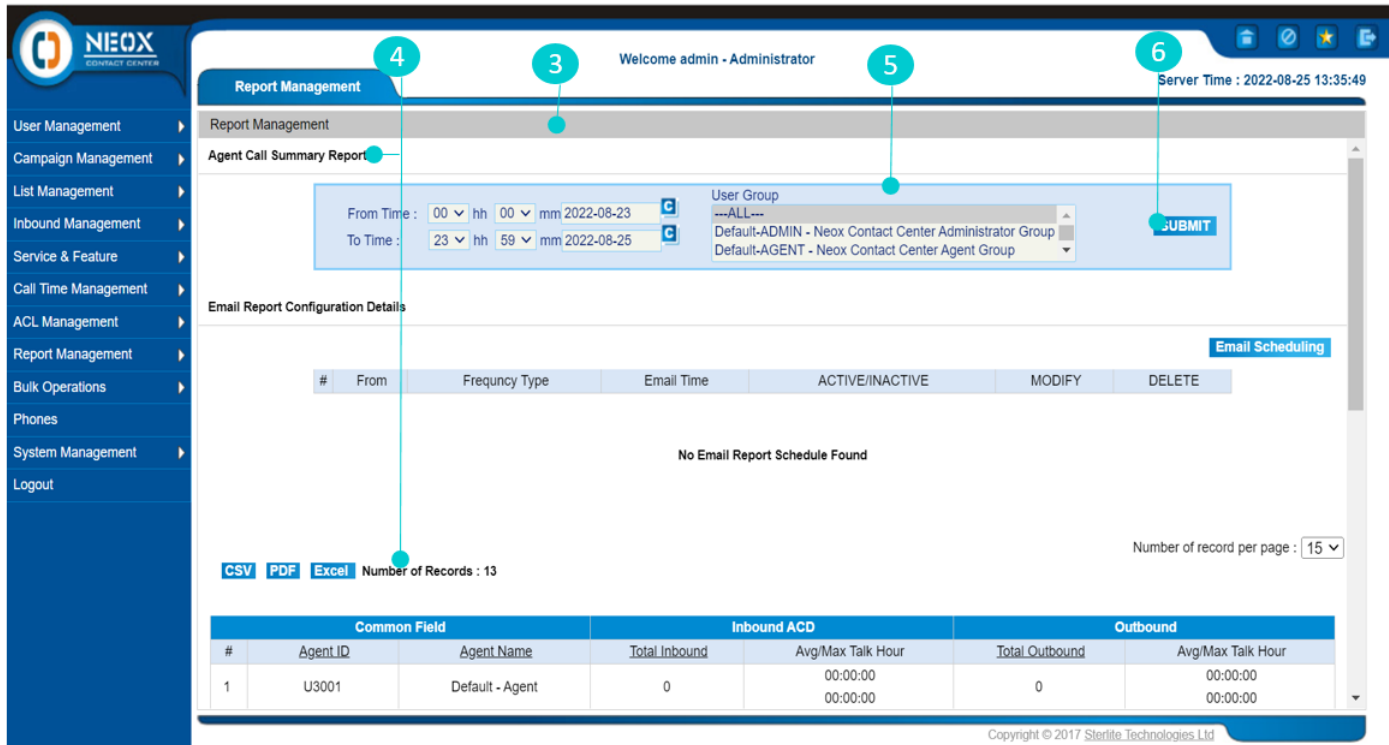


Figure 159 Agent Call Summary Report

5. Use the search filters, such as select date and time and user group to view report.
6. Click **Submit**.
7. Agent Call Summary Report is generated using the search criteria.

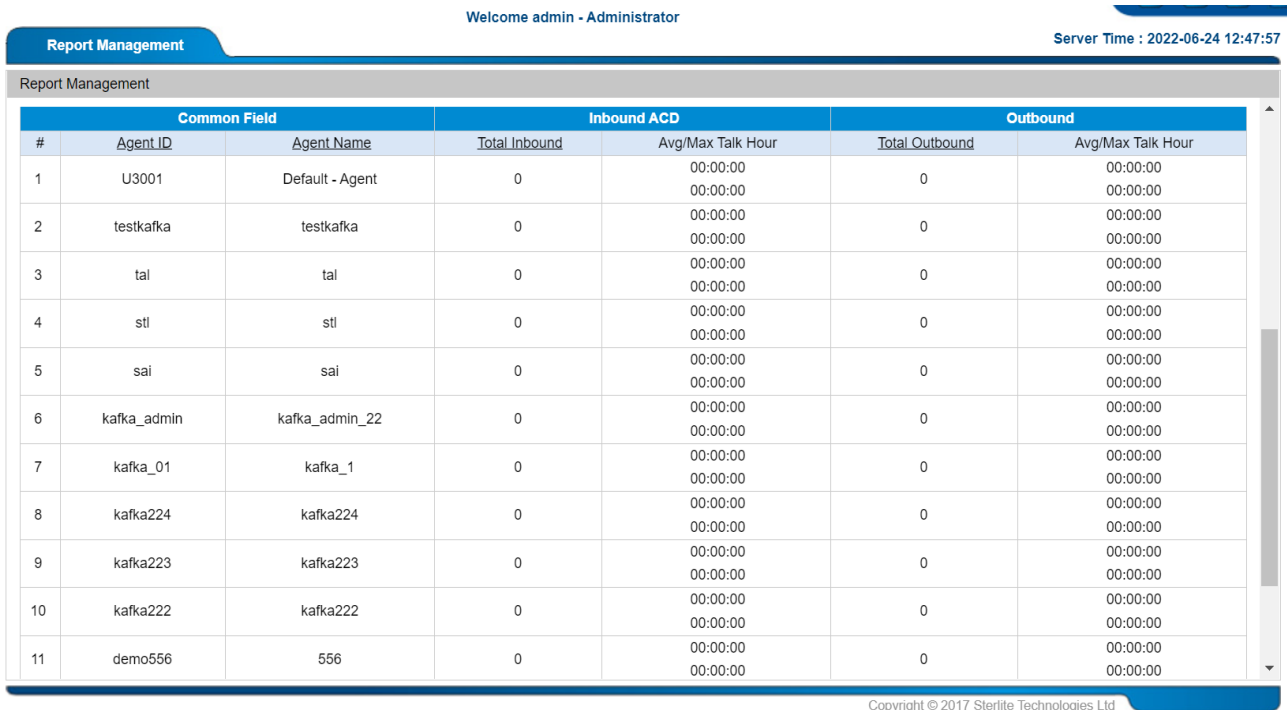


Figure 160 Agent Call Summary Report

Table 49 Agent Call Summary Report

Parameters	Description
Agent ID	ID of the agent who has logged in the system and handled the calls.
Agent Name	Full Name of the agent who has logged in the system and handled the calls.
Total inbound	Total number of inbound calls received by the agent.
Avg/Max Talk Hour	Top field specifies the average talk duration in hours and bottom field specifies the maximum talk duration of the agent (in hours) for inbound calls.
Total outbound	Total number of outbound calls made by the agent.
Avg/Max Talk Hour	Top field specifies the average talk duration in hours and bottom field specifies the maximum talk duration of the agent in hours for the outbound calls.

10.1.4 Agent Break Bifurcation Report

This section provides information about Agent Break Bifurcation Report that enables you to check the time spent by the agents on calls, breaks, and discussion and so on. On this basis of this report, you can assess the performance of your agent and decide the way of how you can improve or award your team. Filters are provided based on Date (Start date to End date) and Time (From Time and To Time), User Group and Campaigns – The Agent belongs to, and the Agent to make the reports more explicit and distinctive. Additionally, you can download when required.

To view the Agent Break Bifurcation Report, do the following:

- *Viewing Agent Break Bifurcation Report*

10.1.4.1 Viewing Agent Break Bifurcation Report

Set the search criteria to view the report for the selective time period, user group, campaign, and agent. This report is generated only after a pause code is selected by the agent.

To view the Agent Break Bifurcation Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Agent Reports**, and then click **Agent Break Bifurcation Report**.

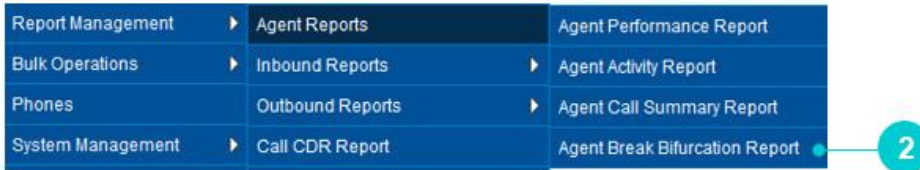


Figure 161 Agent Break Bifurcation Report menu

3. Agent Break Bifurcation Report screen appears.
4. The screen is bifurcated into two sections; Agent Break Bifurcation Report Filter and Agent Break Bifurcation details.
 - Agent Break Bifurcation Report Filter - Provides a way to search Agent Break Bifurcation Report using search criteria, such as Date/Time, User Group, Campaign, and Agent.
 - Agent Break Bifurcation Details - Provides a list view of agent’s break including details such User Name, Start Date, End Date, Campaign, Pause Codes Duration, and Total break time, in addition to downloading CSV, PDF, and Excel formats of report.

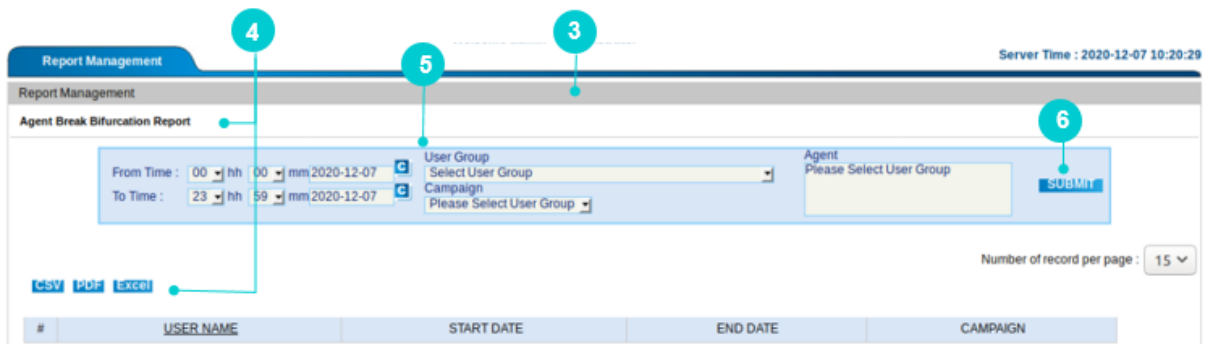


Figure 162 Agent Activity Report

Table 50 Agent Break Bifurcation Report

Parameters	Description
From and To time	Calendar option is available to select the start and end time for the report.
User Group	This is a mandatory filter. Based on the selection of user group, campaign filter is available.

Parameters	Description
Campaign	This is a mandatory filter. Based on the campaign selected, user filter is available. Only one campaign can be selected to view break report.
User	All agents mapped to the selected campaign and user group are listed for user selection. Single or multiple users can be selected from the list. If no agent is selected, break details of all users are displayed in the report mapped to the selected campaign and user group.

- Use the search filters, such as select date and time and user group to generate report.
- Click **Submit**.
- Agent Break Bifurcation Report is generated using the search criteria.

#	USER NAME	START DATE	END DATE	CAMPAIGN	Pause Codes Duration			TOTAL
					Lunch	Tea		
1	U9002	2017-12-01 00:00:00	2020-12-07 23:59:59	camp_1	0:00:16	0:00:06	0:00:22	
					0:00:16	0:00:06	0:00:22	

Figure 163 Agent Break Bifurcation Report

Table 51 Agent Break Bifurcation Report Details

Parameters	Description
Pause Codes Duration	Displays all pause codes with durations that are used by the agent.
Total	Total time of pause code used by the agent.

10.2 Inbound Reports

This section provides information about various Inbound Reports that enables you to view the details of all calls coming in the system. Neox provides four Inbound Reports, namely Inbound Report – Details of all incoming calls, Inbound CDR Report – Summary of all incoming calls, Inbound Call Distribution Summary Report – Shows different metrics for inbound calls, and Inbound Activity Report – Details of all inbound activity report based on inbound group. The Reports are available to view the agent's details for the selected time period, campaigns, and user groups and so on. You can download reports in CSV, PDF, and Excel format.

These reports help you in measuring the call center performance and how the agents are handling the calls. With these reports, you can improve your contact center service by focusing on all operational details.

Following Inbound Reports are available:

- *Inbound Report*
- *Inbound CDR Report*
- *Inbound Call Distribution Summary Report*
- *Inbound Activity Report*

10.2.1 Inbound Report

This section provides information about Inbound Report that enables you to view the details of all incoming calls coming in the system and are filtered based on the different ingroups created by the admin. All the reports are in the graphical format.

To view the Inbound Report, do the following:

- *Viewing Inbound Report*

10.2.1.1 Viewing Inbound Report

Set the search criteria to view the report for the selective time period and inbound group. This report is generated only after the agent finishes a call.

To view the Inbound Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Inbound Reports**, and then click **Inbound Report**.

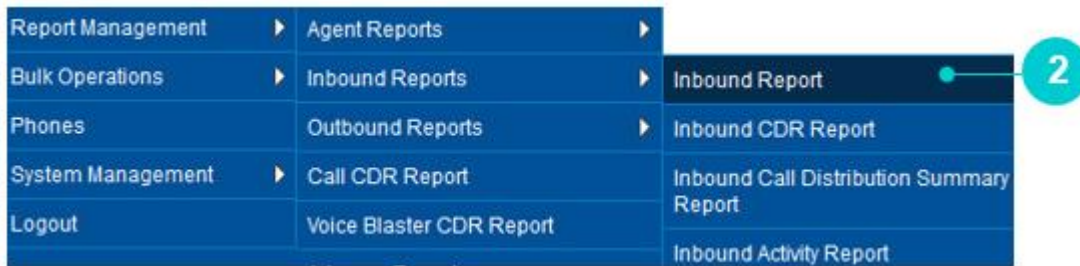


Figure 164 Inbound CDR Report menu

3. Inbound Reports screen appears.
4. Use the search filters, such as select date and time, and Inbound Groups to view report of the inbound calls and its various status.
5. Click **Submit**.

6. Inbound Report is generated using the search criteria.

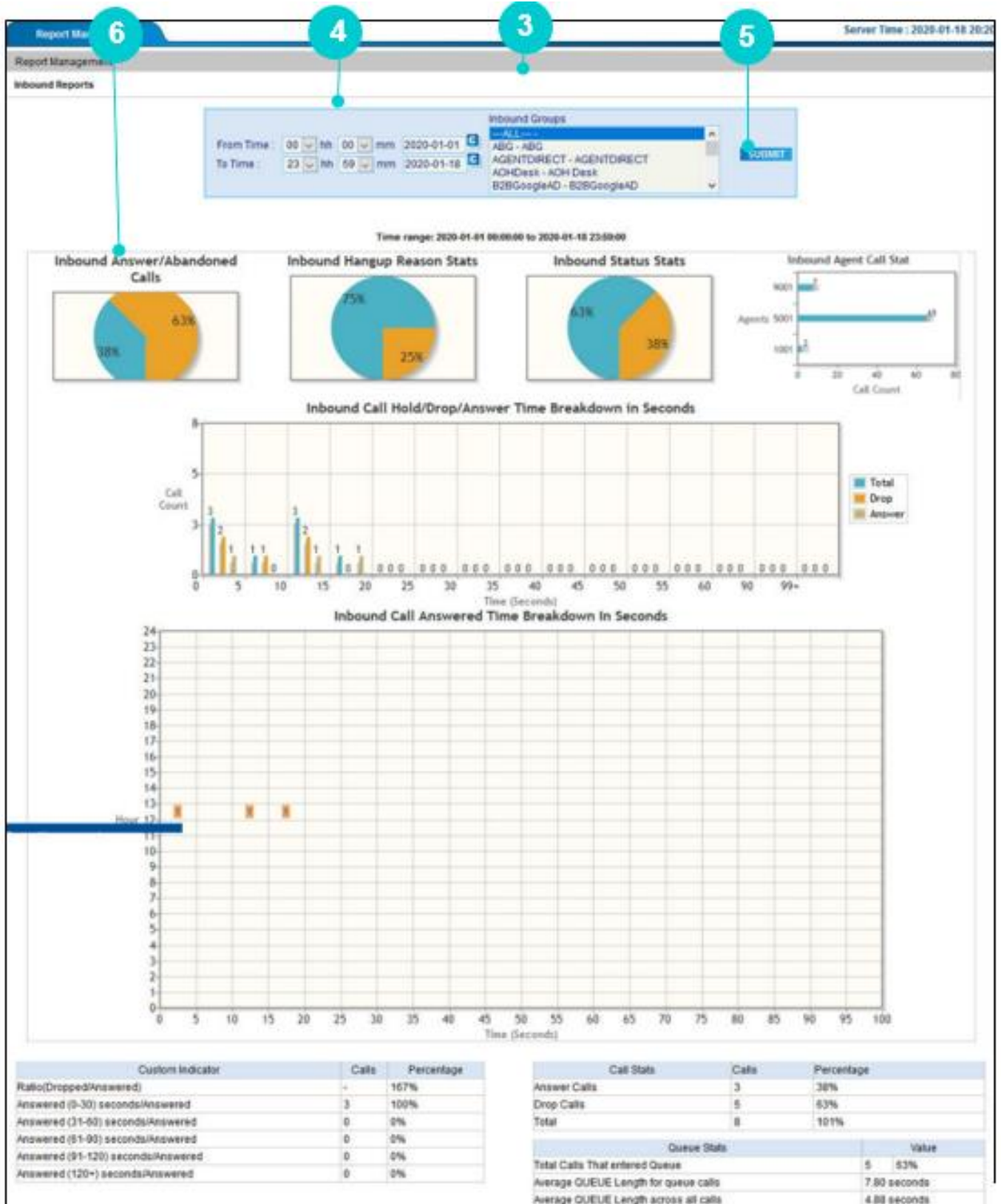


Figure 165 Inbound Report

- Inbound Answer/Abandoned Calls** – Provides the details of the inbound calls unanswered by the agent or automatic disposed by the system and answered calls. Also the average talk duration, average call length, average queue time for answered calls, and average time the customer was on hold for abandoned calls are listed on top.

To view details, click the pie chart.

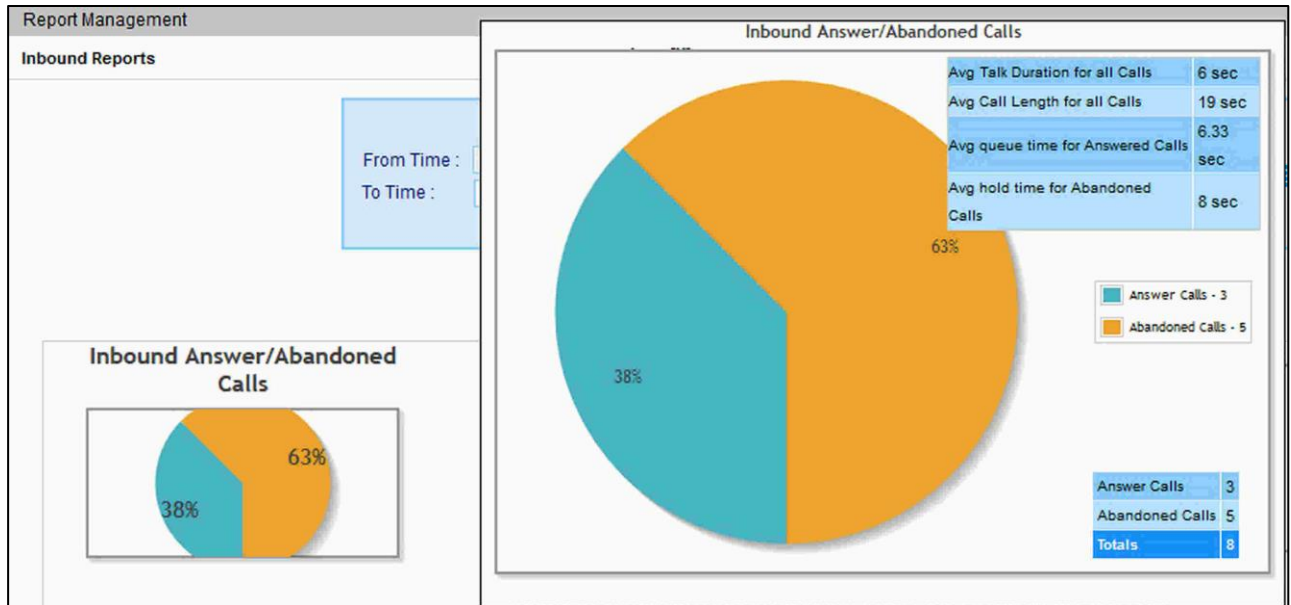


Figure 166 Inbound Answer/Abandoned Calls

- Inbound Hangup Reason Stats** – Displays a pie-chart representation of the reasons, why the call was ended. These can be CALLER (customer ended the call), AGENT (Agent ended the call), ABANDON (the call was not answered by the agent), AFTERHOURS (the call came after the working hours), NOAGENT (there was no agent logged in), WAITTIMER (the call was ended by customer as he was in queue), and so on.

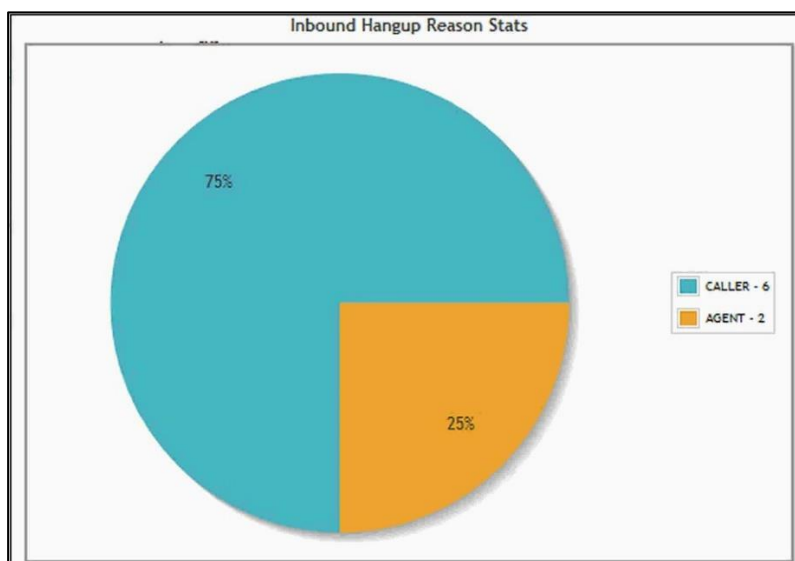


Figure 167 Inbound Hangup Reason Stats

- 9. **Inbound Status Stats** – Displays a pie-chart representation of the disposition status selected for the inbound calls. The various widely used disposition status are Answering machine, Do Not Call, declined sales, Sale Made, No Answer, Not Interested, Busy, and so on.

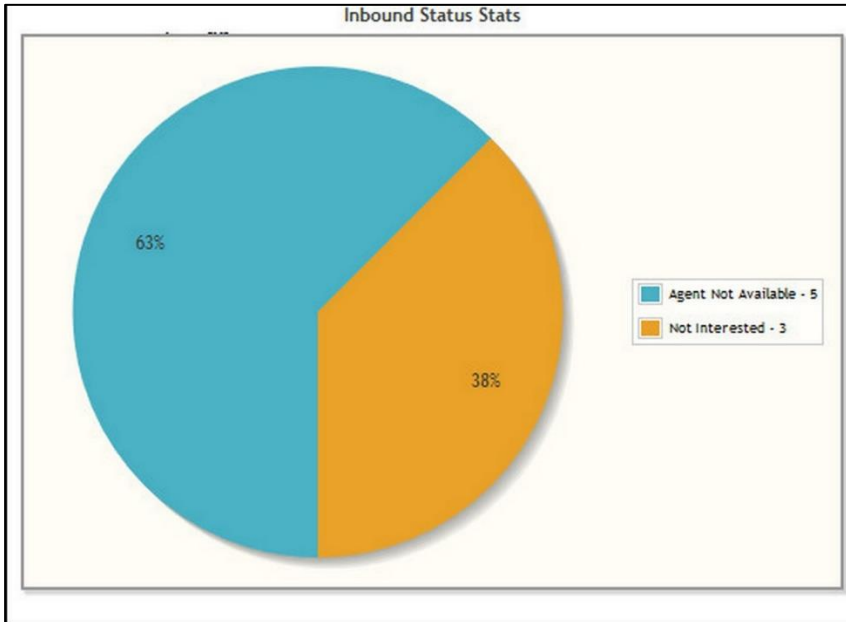


Figure 168 Inbound Status Stats

10. **Inbound Agent Call Stat** – Provides a graphical representation of the number of calls attended by each agent. The horizontal axis represents the agent name and the vertical axis represents the number of calls the agent attended.

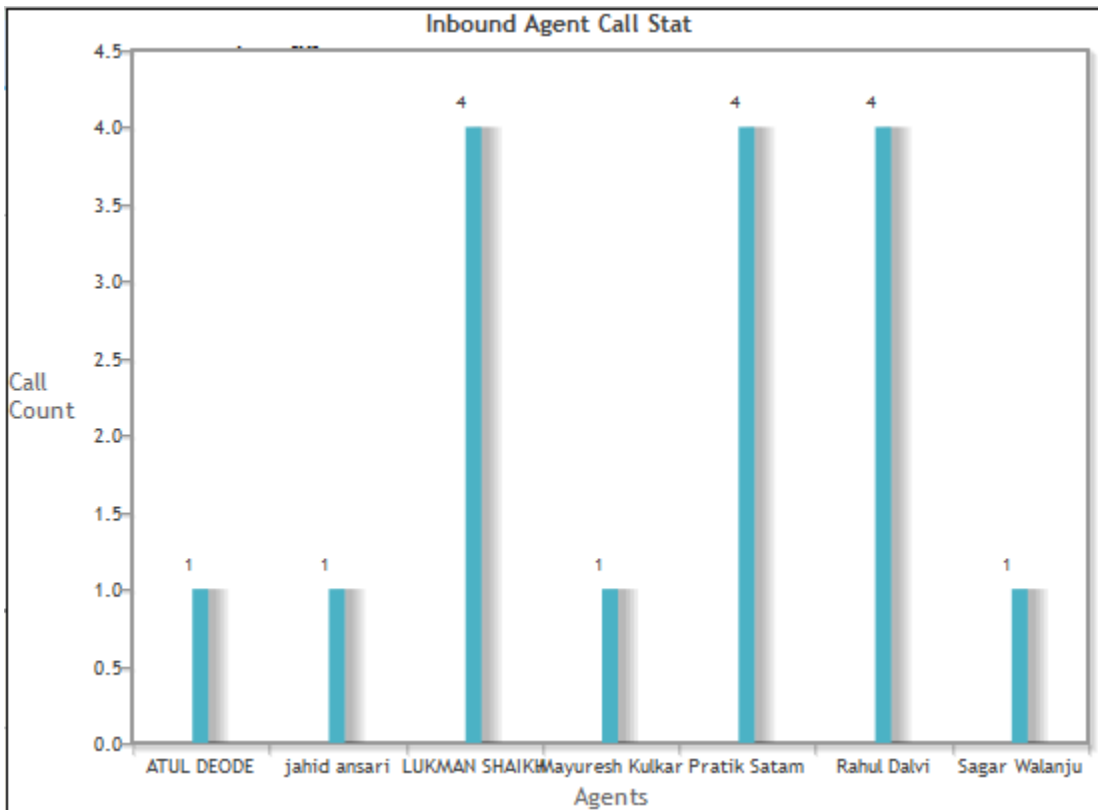


Figure 169 Inbound Agent Call Stat

11. **Inbound Call Hold/Drop/Answer Time Breakdown in Seconds** – Provides details of the total number of inbound calls kept on hold, dropped calls, and answered calls in the given time. The horizontal axis represents the time duration in seconds and the vertical axis represents the call count for that time duration.

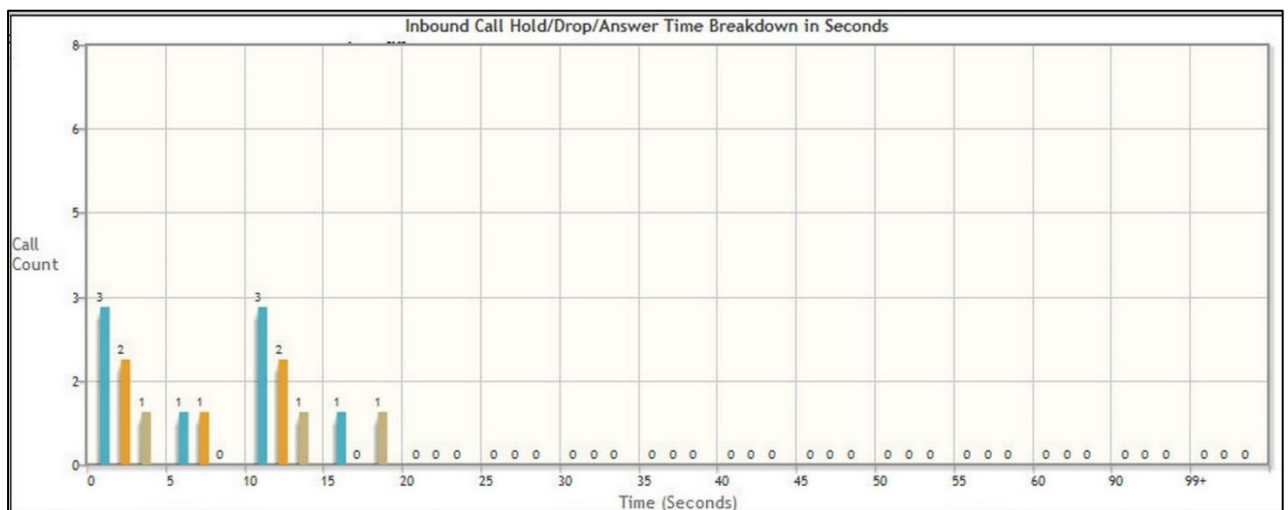


Figure 170 Inbound Call Hold/Drop/Answer Time Breakdown in Seconds

12. **Inbound Call Answered Time Breakdown in Seconds** – Provides the details of the inbound calls answered at the specific time. The vertical axis represents the hour of the day and the horizontal axis represents the time duration of the calls. The number written on the graph represents the call count.

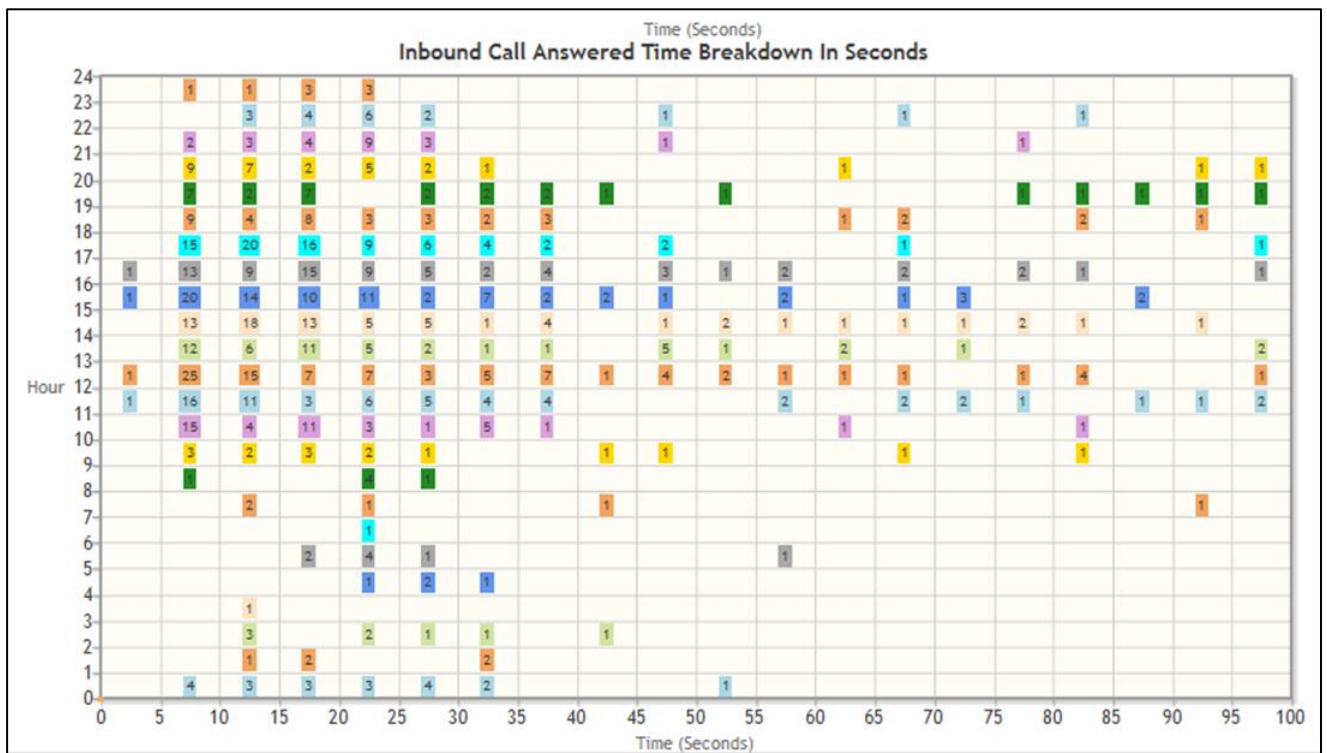


Figure 171 Inbound Call Answered Time Breakdown in Seconds

13. Provides the details of the calls answered every 30 seconds.

Custom Indicator	Calls	Percentage
Ratio(Dropped/Answered)	-	167%
Answered (0-30) seconds/Answered	3	100%
Answered (31-60) seconds/Answered	0	0%
Answered (61-90) seconds/Answered	0	0%
Answered (91-120) seconds/Answered	0	0%
Answered (120+) seconds/Answered	0	0%

Call Stats	Calls	Percentage
Answer Calls	3	38%
Drop Calls	5	63%
Total	8	101%

Queue Stats		Value
Total Calls That entered Queue	5	63%
Average QUEUE Length for queue calls	7.80 seconds	
Average QUEUE Length across all calls	4.88 seconds	

Figure 172 Answered Call Details

Table 52 Answered Call Details

Parameters	Description
Custom Indicator	<ul style="list-style-type: none"> Answered/Total calls taken into this In-group - Provides the percentage of answered calls from the total inbound calls. Dropper/Answered - Provides the details of the dropped calls divided by the answered calls. For example, Dropped calls = 5 and Answered calls = 3 $(5/3) * 100 = 167\%$ Answered within 20 seconds/Answered: Provides the percentage of Answered within 20 seconds divided by Answered calls.

Parameters	Description
	<p>For example, Answered within 20 seconds = 226 and Answered calls = 152 $(226/152) * 100 = 148\%$</p> <ul style="list-style-type: none"> • Answered within 30 seconds/Answered: Provides the percentage of Answered within 30 seconds divided by Answered calls. For example, Answered within 30 seconds = 226 and Answered calls = 163 $(226/163) * 100 = 138\%$
Queue Stats	<ul style="list-style-type: none"> • Total calls that entered Queue: Provides the number and the percentage of that where in queue. For example, Calls in queue = 516 and Total calls = 550 $(516/550) * 100 = 94\%$ • Answered QUEUE length for queue calls - Provides the average length of queue calls in seconds calculated for queue calls only. For example, Sum of the time duration in queue of Queue calls = 27353 and No. of Queue calls = 516 $(27353/516) = 53.01$ seconds • Answered QUEUE length across queue calls - Provides the average length of queue calls in seconds calculated for all calls. For example, Sum of the time duration in queue of Queue calls = 27353 and No. of calls = 550 $(27353/550) = 49.73$ seconds

10.2.2 Inbound CDR Report

This section provides information about Inbound CDR Report that helps you to access the various calls details, which includes incoming calls of the callers.

To view the Inbound CDR Report, do the following:

- *Viewing Inbound CDR Report*

10.2.2.1 Viewing Inbound CDR Report

Set the search criteria to view the incoming call details report.

To view the Inbound CDR Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, and click **Inbound CDR Report**.



Figure 173 Inbound CDR Report menu

3. Inbound CDR Reports screen appears.
4. The screen is bifurcated into three sections; Inbound CDR Report Filter, Email Report Configuration Details, and Inbound CDR Reports Detail.
 - Inbound CDR Report Filter - Provides a way to search Inbound CDR Report using search criteria, such as Date and Time, Inbound Group, Campaign, Call Category, Agent, Duration, and Phone Number.
 - Email Report Configuration Details – Provides a way to schedule email to get the report and a list view of all scheduled reports.
 - Inbound CDR Reports List – Provides a list view of Inbound CDR report, in addition to downloading CSV and Excel formats of report.



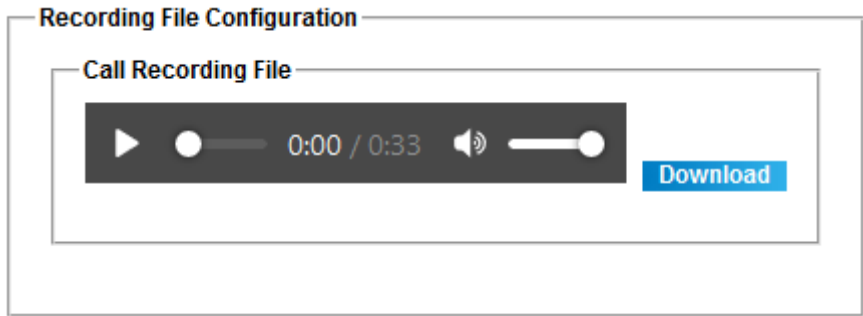
Figure 174 Inbound CDR Report

5. Use the search filters, such as select date and time, user group, campaign, and agent to view the report.
6. Click **Submit**.
7. Inbound Report is generated using the search criteria.
8. You can play or download CDR by clicking **Play/Download**.

#	DID List	DID Line	Campaign	Inbound Group	Call Date	User	Extension	Phone Number	Type of Call	Hold Duration	Total Duration	Talk Duration	Queue Duration	Call Disposition Duration	Status	Customer Dispo Status	Term Reason	Customer Time	UniqueID	Play/Download Recording
1	2001	777	C-INBman-C-INBman	sales - sales-Group	2022-07-12 18:33:44	U9001	9001	3330001	Answered	00:00:55	0:01:34	0:01:22	0:00:06	00:00:10	Not Interested		AGENT	2022-07-12 18:33:44	CI1657631024497	Play/Download
2	2001		C-INBman-C-INBman	sales - sales-Group	2022-07-13 18:25:56	U9002	9001	3330001	Abandoned	00:00:37	0:01:26	0:01:05	0:00:09	00:05:05	Busy		AGENT	2022-07-13 18:25:54	DP1657716954364076	Play/Download
3	2001	777	C-INBman-C-INBman	sales - sales-Group	2022-07-14 11:49:49	U9001	9001	3330001	Answered	00:00:35	0:01:20	00:00:00	00:00:00	00:00:11	Not Interested		AGENT	2022-07-14 11:49:49	CI1657779589415	Play/Download
4	2001	777	C-INBman-C-INBman	sales - sales-Group	2022-07-13 18:32:41	U9001	7001	3330001	Answered	00:00:30	0:01:28	0:00:50	0:00:10	00:00:44	Not Interested		AGENT	2022-07-13 18:32:41	CI165771736197	Play/Download
5	2001		C-INBman-C-INBman	AGENTDIRECT - AGENTDIRECT	2022-07-13 18:33:52	U9002	9001	3330001	Answered	00:00:26	0:01:55	0:00:58	0:01:45	00:02:17	Sale Made		AGENT	2022-07-13 18:33:51	DP1657717431245411	Play/Download
6	2001	777	C-INBman-C-INBman	sales - sales-Group	2022-07-12 17:29:54	U9001	9001	3330001	Answered	00:00:24	0:01:27	0:01:02	0:00:18	00:00:25	Not Interested		AGENT	2022-07-12 17:29:54	CI1657627194114	Play/Download
7	2001	777	C-INBman-C-INBman	sales - sales-Group	2022-07-12 18:37:17	U9001	9001	3330001	Answered	00:00:23	0:00:57	0:00:37	0:00:14	00:00:26	Not Interested		AGENT	2022-07-12 18:37:17	CI1657631237433	Play/Download

Figure 175 Inbound CDR Report

Parameters	Description
DID list	DID numbers on customer’s calls landed.
Inbound Group	The agent is logged in and handled the calls in this In-group name.
Call Date	The date and time when the customer has called.
User	The agent’s User name, which he has used to, logged into systems. Sometimes it could be VDCL for inbound abounded calls.
Extension	The extension number used by the agent.
Phone Number	The customer number from which the call has come.

Parameters	Description
Type of Call	Identify the type of call like an Answered call or abandoned call.
Hold Duration	This is the total time duration for which the customer is on hold during the call.
Total Duration	Talk time + queue time of the customer during the call.
Talk Duration	The total time duration of the customer with the agent.
Queue Duration	This is the time duration, the customer was waiting for an agent. This can be more than the talk duration when the call is transferred to the agent. In this case, the queue time for connecting both the agent and customer are taken into consideration.
Call Disposition Duration	This is the total time duration between disconnecting the call and submitting the disposition.
Status	The disposition status selected by the agent for the call. Some calls might be auto disposed by the system and status is entered by the system.
Customer Dispo Status	Feedback from the customer given in case the call is diverted to the feedback menu by the agent.
Term Reason	The call ended by the Agent or Customer.
Customer Time	The date and time of the customer base on its location/country.
Unique ID	The unique ID generated by Neox for each call.
Play/Download Recording	<p>Contains the call recording file, which can be played or downloaded by clicking the Play/Download recording as below.</p>  <p><i>Figure 176 Recording File</i></p>

10.2.3 Inbound Call Distribution Summary Report

This section provides the details of the Inbound Call Distribution Summary Report that enables the administrator to view inbound call details through different inbound metrics. The metrics include the Call Answered Time and Drop Time breakdown in seconds based on the set filter.

To view the Inbound Call Distribution Summary Report, do the following:

- *Viewing Inbound Call Distribution Summary Report*

10.2.3.1 Viewing Inbound Call Distribution Summary Report

To view the Inbound Call Distribution Summary Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, and click **Inbound Call Distribution Summary Report**.

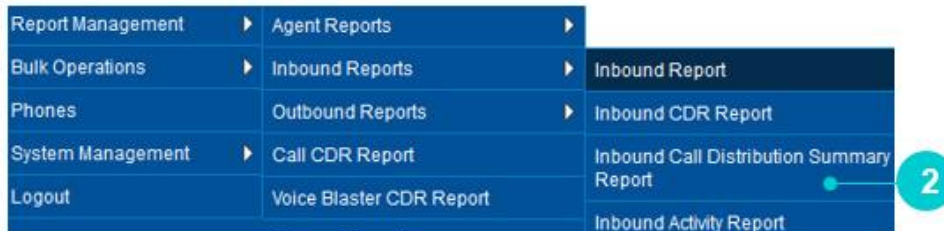


Figure 177 Inbound Call Distribution Summary Report menu

3. Inbound Call Distribution Summary Report screen appears.
4. The screen is bifurcated into three sections; Inbound Call Distribution Summary Report Filter, Email Report Configuration Details, and Inbound Call Distribution Summary Reports Detail.
 - Inbound Call Distribution Summary Report Filter - Provides a way to search Inbound Call Distribution Summary Report using search criteria, such as Date and Time and Inbound Group.
 - Email Report Configuration Details – Provides a way to schedule email to get the report and a list view of all scheduled reports.
 - Inbound Call Distribution Summary Report List – Provides a list view of Inbound Call Distribution Summary report, in addition to downloading CSV, PDF, and Excel formats of report.

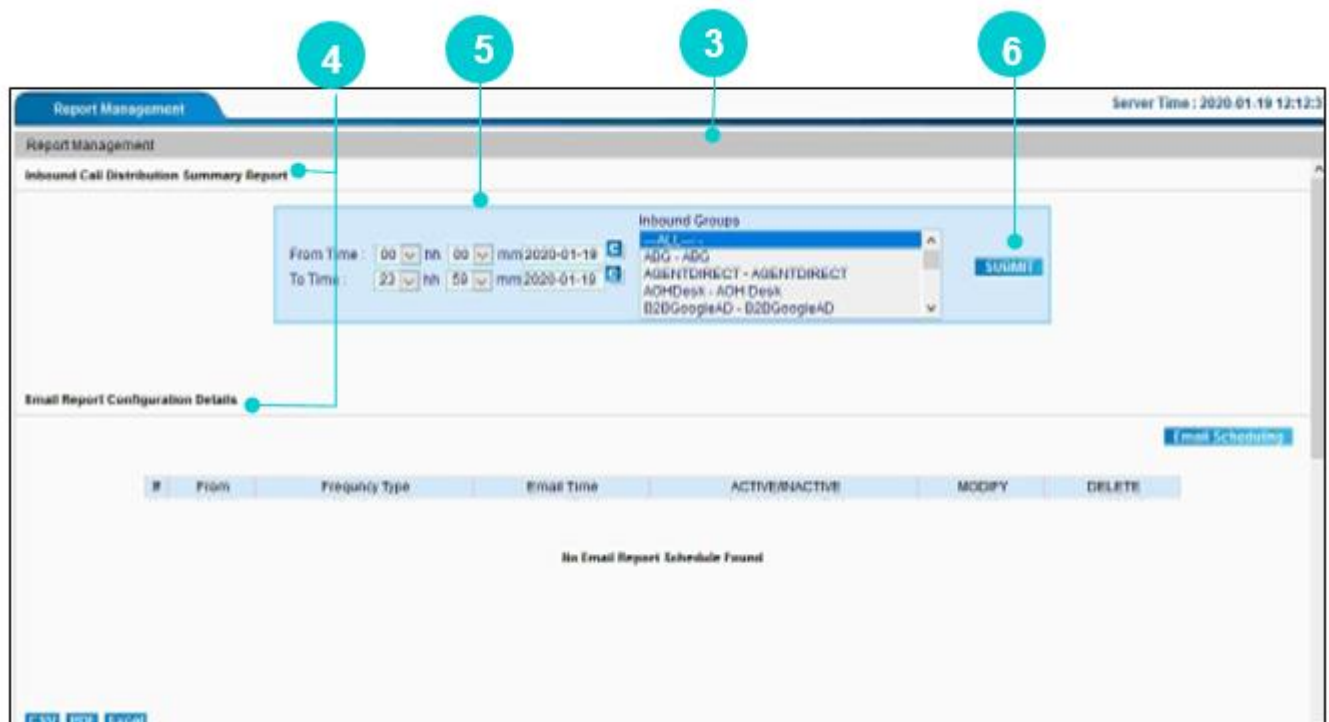


Figure 178 Inbound Call Distribution Summary Report

5. Use the search filters, such as select date and time inbound groups to view the report.
6. Click **Submit**.
7. Inbound Call Distribution Summary Report is generated using the search criteria.

The call is distributed as follows:

- Call Answer Time and Drop Time Percentage Breakdown in Seconds
- Call Answered Time and Percentage Breakdown in Seconds
- Call Drop Time and Percentage Breakdown in Seconds

Report Management												
CALL ANSWER TIME AND DROP TIME PERCENTAGE BREAKDOWN IN SECONDS												
Inbound Group	Call Type	TOTAL	0-30		31-60		61-90		91-120		+120	
ALL	Answer	0	0	0%	0	0%	0	0%	0	0%	0	0%
	Drop	0	0	0%	0	0%	0	0%	0	0%	0	0%
	TOTAL	0	0	0%	0	0%	0	0%	0	0%	0	0%

CALL ANSWERED TIME AND PERCENTAGE BREAKDOWN IN SECONDS												
Sr No	Inbound Group	TOTAL	0-30		31-60		61-90		91-120		+120	
1	AGENTDIRECT	0	0	0%	0	0%	0	0%	0	0%	0	0%
2	AOHDesk	0	0	0%	0	0%	0	0%	0	0%	0	0%
-	TOTAL	0	0	0%	0	0%	0	0%	0	0%	0	0%

CALL DROP TIME AND PERCENTAGE BREAKDOWN IN SECONDS												
Sr No	Inbound Group	TOTAL	0-30		31-60		61-90		91-120		+120	
1	AGENTDIRECT	0	0	0%	0	0%	0	0%	0	0%	0	0%
2	AOHDesk	0	0	0%	0	0%	0	0%	0	0%	0	0%
-	TOTAL	0	0	0%	0	0%	0	0%	0	0%	0	0%

Figure 179 Inbound Call Distribution Summary Report

- Inbound Call Distribution Summary Report shows percentage breakdown in seconds for different inbound metrics, like Answered calls and dropped calls. The call distribution for different inbound groups can be filtered.
- Answered calls percentage breakdown shows as to how long it took the agent to answer the call of the customer.
- Drop calls percentage breakdown shows as to how long the customer was on hold before the call was disconnected.
- So summary of all inbound groups during specified time interval is displayed with the percentage breakdown in seconds for Answered and Dropped Calls. 0 means call was answered in 0 secs, 1- 30 indicates call was answered between 1 to 15 secs and so on. Likewise, in call drop, +120 indicates caller waited for more than 120 seconds and then dropped.

Note

You can change the time seconds slab to change the time frame in this report from *System Management*>>*Server Management*.

10.2.4 Inbound Activity Report

This section provides the details of the Inbound Activity Report that enables the administrator to view inbound calls activity report for each inbound group on an hourly basis. The report helps you in understanding the total number of incoming calls, and bifurcation of the calls based on human answered and non-human answered calls, including the details of call handled time and talk duration.

To view the Inbound Activity Report, do the following:

- *Viewing Inbound Activity Report*

10.2.4.1 Viewing Inbound Activity Report

To view the Inbound Activity Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Inbound Reports**, and click **Inbound Activity Report**.



Figure 180 Inbound Activity Report menu

3. Inbound Activity Report screen appears.
4. The screen is bifurcated into three sections; Inbound Activity Report Filter, Email Report Configuration Details, and Inbound Activity Report Detail.
 - Inbound Activity Filter - Provides a way to search Inbound Activity Summary Report using search criteria, such as Date and Time and Inbound Group.
 - Email Report Configuration Details – Provides a way to schedule email to get report and a list view of all scheduled reports.
 - Hourly Inbound Activity Report Per Inbound Group – Provides a list view of Inbound Activity report for each inbound group, in addition to downloading CSV, PDF, and Excel formats of report.

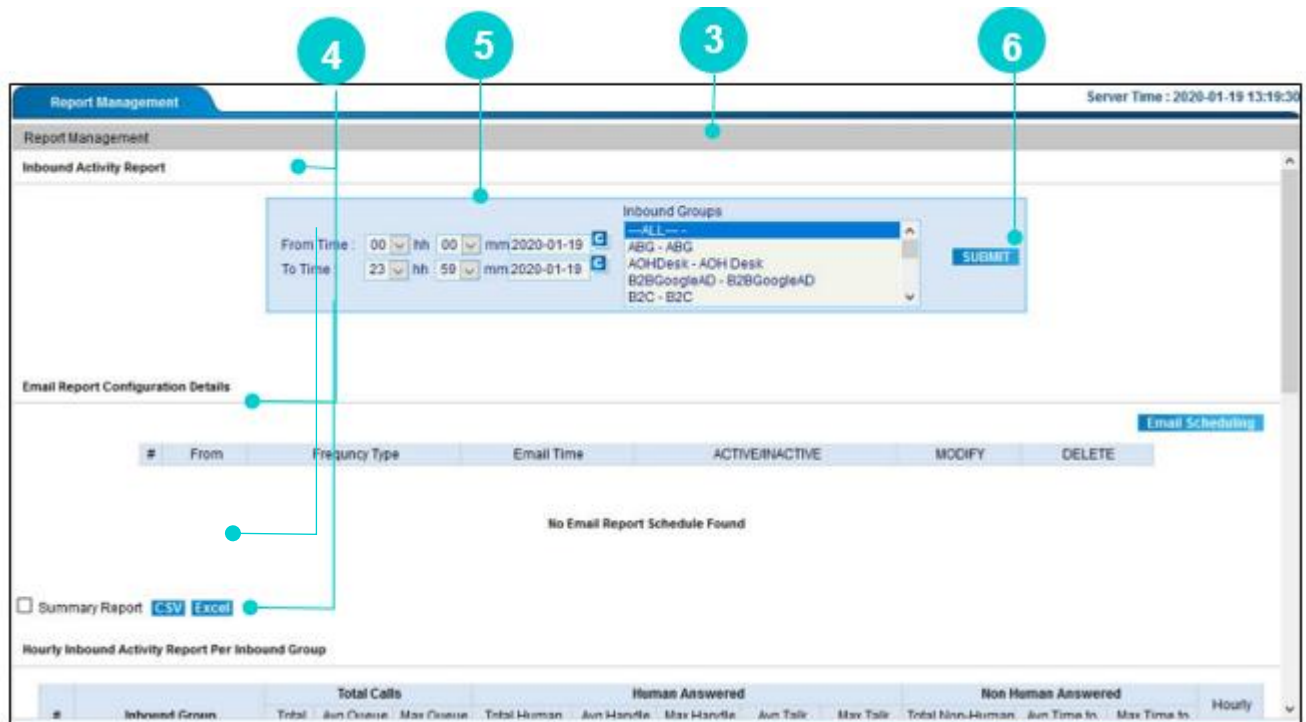


Figure 181 Hourly Inbound Activity Report

5. Use the search filters, such as select date and time and inbound groups to view the report.
6. Click **Submit**.
7. Hourly Inbound Activity Report Per Inbound Group is generated using the search criteria.
8. Click the Hourly details to view details of Total Calls, Human Answered and Non Human Answered calls.
9. You can also download the report in CSV and Excel format. If you want to download only a summary report, then select Summary Report that is downloadable also in PDF format.

#	Inbound Group	Total Calls			Human Answered				Non Human Answered			Hourly Details	
		Total Calls	Avg Queue Time	Max Queue Time	Total Human Answered	Avg Handle Length	Max Handle Length	Avg Talk Duration	Max Talk Duration	Total Non-Human Answered	Avg Time to Abandon		Max Time to Abandon
1	limitgrp-limitgrp	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00	Hourly Details

Hours	Total Calls			Human Answered				Non Human Answered			
	Total Calls	Avg Queue Time	Max Queue Time	Total Human Answered	Avg Handle Length	Max Handle Length	Avg Talk Duration	Max Talk Duration	Total Non-Human Answered	Avg Time to Abandon	Max Time to Abandon
0 - 1	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
1 - 2	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
2 - 3	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
3 - 4	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
4 - 5	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
5 - 6	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
6 - 7	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
7 - 8	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
8 - 9	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
9 - 10	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
10 - 11	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00
11 - 12	0	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00

Figure 182 Hourly Inbound Activity Report Per Inbound Group

Parameters	Description
Inbound Group	Displays the name of the In-group name for which you have generated the report.
Total calls	Total number of inbound calls received by the agent.
Avg Queue time	The average time of customer that remains in queue for a particular in-group.
Max Queue time	Displays the maximum time customers remained in queue for a particular in-group.
Total human answered	Total number of calls answered by the agents for a particular in-group.
Avg handled length	The average time taken by the agent to talk and dispose the call of the customer.
Max handled length	Maximum time taken by the agent to talk and dispose the call of the customer.
Avg talk duration	Average time taken by the agent to talk to the customer in a particular in-group.
Max talk duration	Maximum time taken by the agent to talk to the customer in a particular In-group.

Parameters	Description
Total Non-human answered	Total number of calls not answered by the agent or disconnected on IVR.
Avg time to abandon	Average time duration customer waited before disconnecting the call for a particular in-group.
Max time to abandon	Maximum time duration customer waited before disconnecting the call for a particular in-group.
Hourly details	<p>Gives an hourly report of the calls handled in a particular in-group. Click on the yellow highlighted data to view hourly detail of the in-group.</p> <p>For example, in the report given above, between 7-8 AM, 2 inbound calls came and 2 were answered. The time duration for each field is specified in that particular hour.</p>

10.3 Outbound Reports

This section provides information about various Outbound Reports that enables you to view the details of all outgoing calls made by the agent. The agent makes these calls due to any reasons, such as promotion, call back request and so on. Neox provides three Outbound Reports, namely Outbound Reports – Details of outbound calls per Campaign, Outbound CDR Report – Details of all Outgoing Calls, and Outbound Activity Report - Details of all outbound activity report based on campaign. The Reports are available to view the agent's details for the selected time period, campaigns, and user groups and so on. You can download reports in CSV, PDF, and Excel format.

These reports help you in measuring the agent's performance and effectiveness in outbound skills, as also it measures how the agents are handling the calls. With these reports, you can improve your contact center service by focusing on all operational details.

Following Outbound Reports are available:

- *Outbound Report*
- *Outbound CDR Report*
- *Outbound Activity Report*

10.3.1 Outbound Report

This section provides information about Outbound Report that enables you to view the details of all outgoing based on the selective campaign. The report is displayed in a graphical format.

To view the Outbound Report, do the following:

- *Viewing Outbound Report*

10.3.1.1 Viewing Outbound Report

Set the search criteria to view the report for the selective time period and campaign. This report is generated only after the agent finishes a call.

To view the Inbound Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Outbound Reports**, and then click **Outbound Report**.

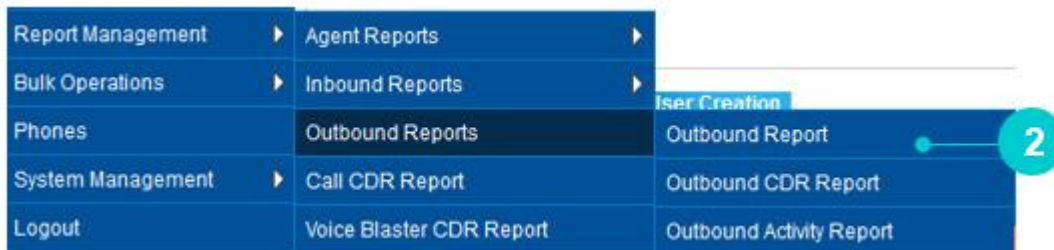


Figure 183 Outbound menu

3. Outbound Report screen appears.
4. Use the search filters, such as select date and time, and Campaign to view report of the outgoing calls and its various status.
5. Click **Submit**.

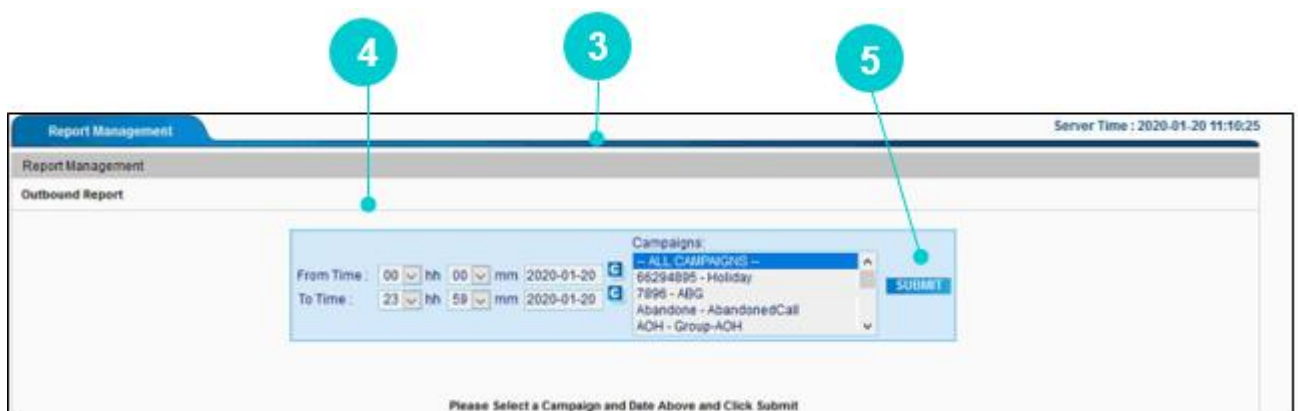


Figure 184 Inbound Report

6. Outbound Report is generated using the search criteria.

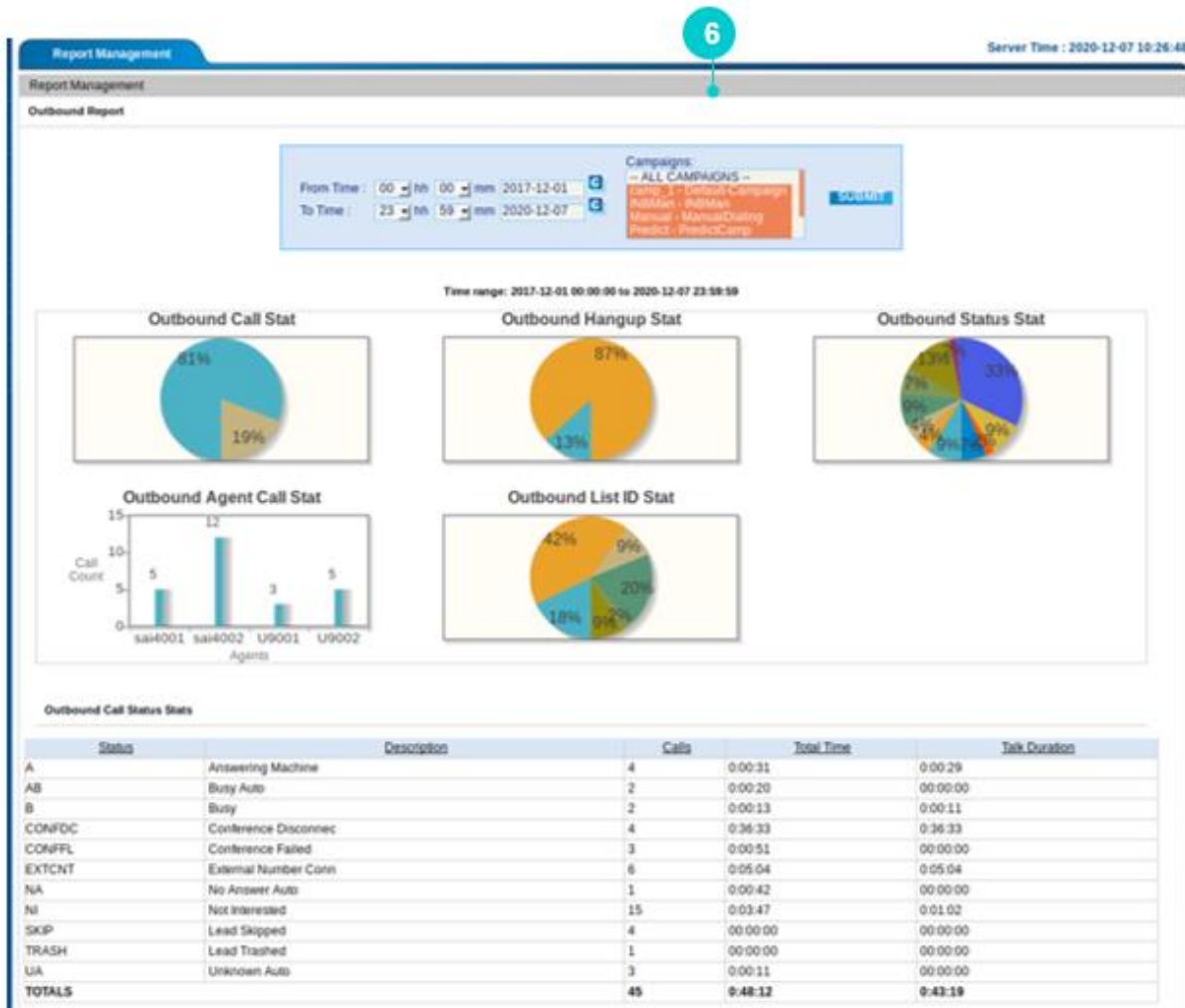


Figure 185 Outbound Report

- Outbound Call Stat** – Click the pie chart to view outbound call status. This pie chart includes the summary of outbound calls in the campaign for time range selected in the filter criteria. The details included in the the pie chart are No. of Human Answered Calls , No. of Dropped Calls, and No. of Calls not Answered from Total No. of Calls made . It also shows the granularity of the call, that is Avg Call Length for all Calls, Avg Call length for HA (Human Answered) Calls, Avg Talk Duration for HA Calls, Avg Call Length for Drop Calls and Avg Call Length for NA (No Answered)Calls.

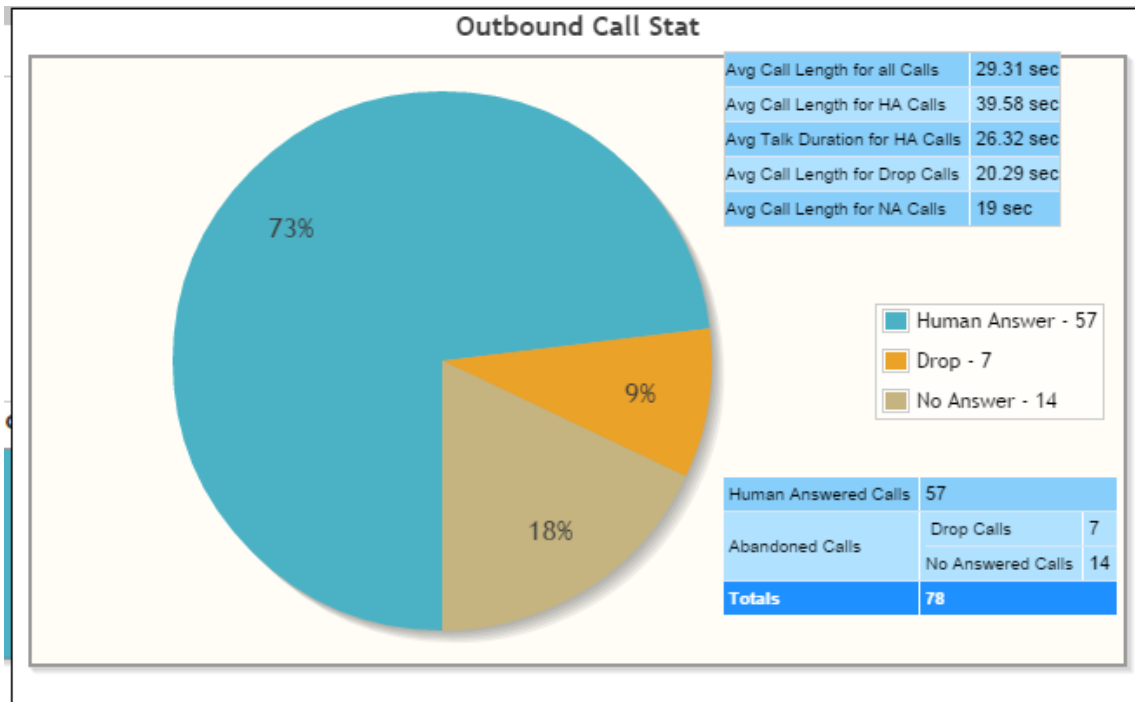


Figure 186 Outbound Call Status

- Outbound Hangup Stat** - Click the pie chart to view outbound hangup status. This pie chart includes the summary of outbound calls hung up by the customer and agent.

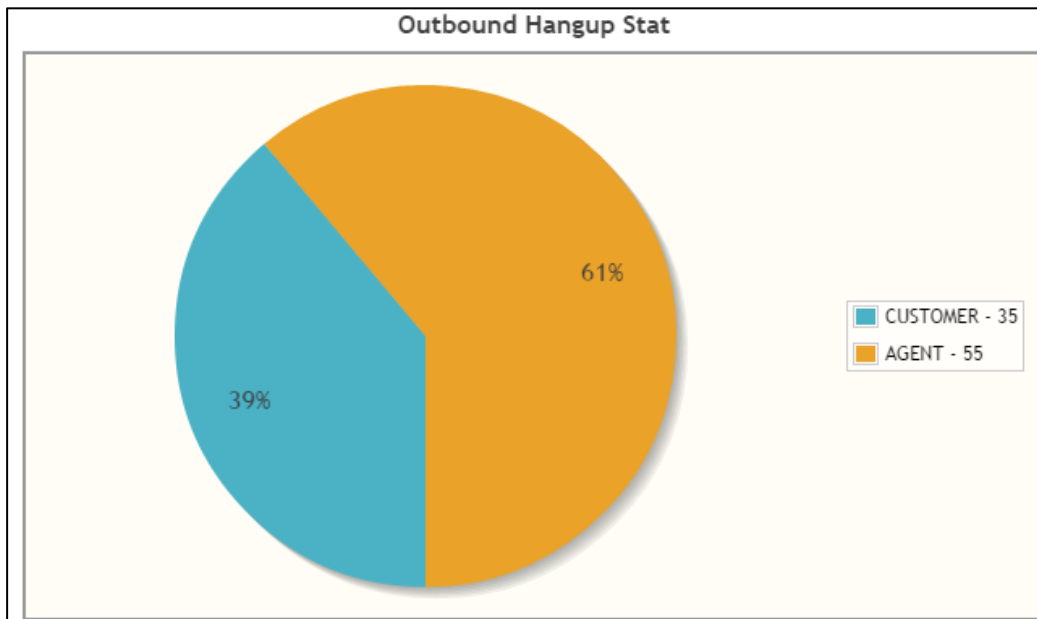


Figure 187 Outbound Hangup Stat

- Outbound Status Stat** - Click the pie chart to view outbound status. This pie chart includes the summary of outbound calls disposition status. The status are displayed based on the Disposition Status selected by the agent while ending the outgoing call. The statuses are Answered Machine, Busy Auto, Busy, Call Back and so on.

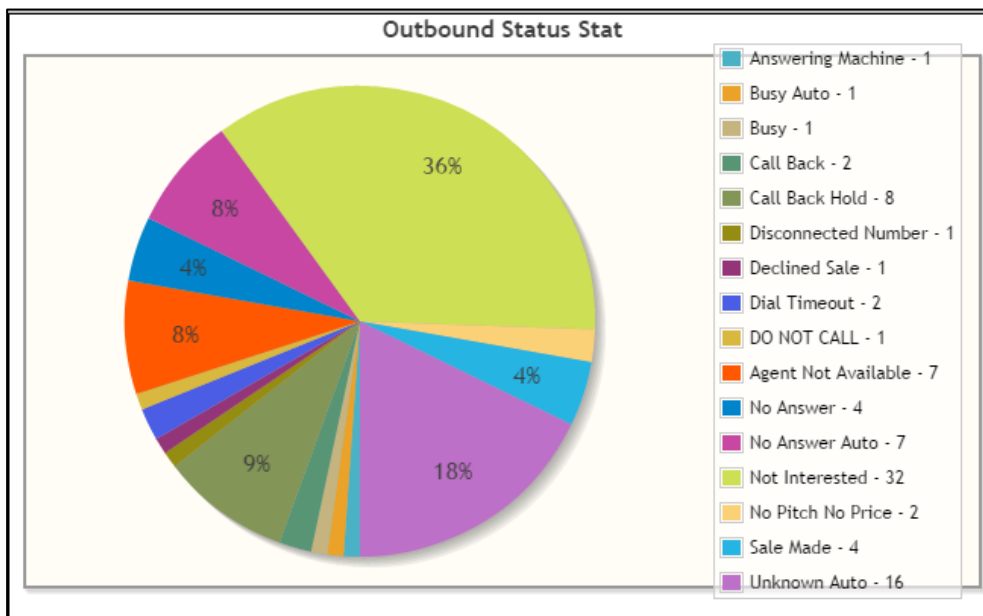


Figure 188 Outbound Status Stat

10. **Outbound Agent Call Stat** – Click the pie chart to view the outbound agent call status. The status displays the agent’s name with the number of calls made.

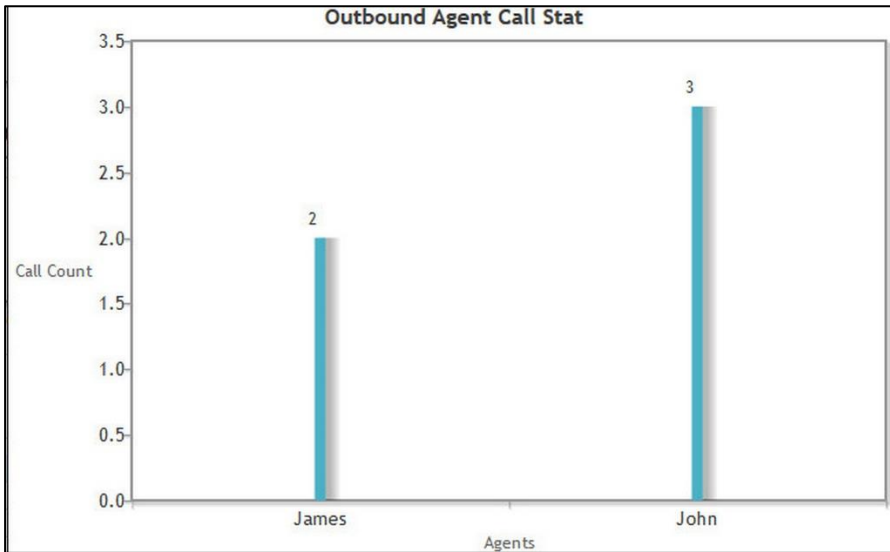


Figure 189 Outbound Agent Call Stat

11. **Outbound List ID Stat** - Click the pie chart to view the outbound list id status. The status the displays the lists used by the agents to make the outgoing calls.

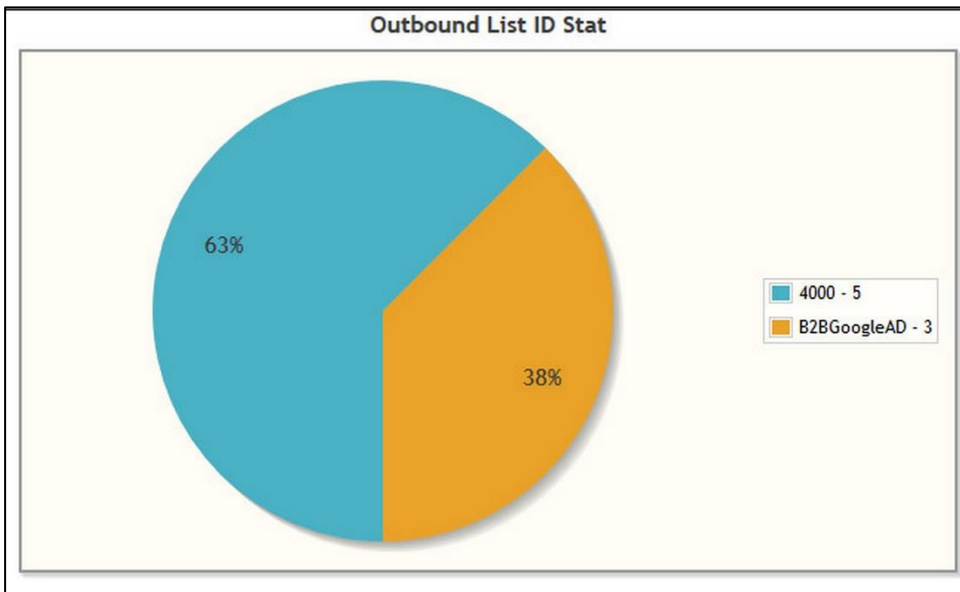


Figure 190 Outbound List ID Stat

12. **Outbound Call Status Stats** - Provides the details of the outgoing calls' disposition statuses such as Disposition Status, Description, Calls, Total Time, and Talk Duration. A statistic of the number of calls disposed under that particular status along with the talk time and total time (talk time + disposition time) is given in this section.

Outbound Call Status Stats					
Status	Description	Calls	Total Time	Talk Duration	
A	Answering Machine	4	0:00:31	0:00:29	
AB	Busy Auto	2	0:00:20	00:00:00	
B	Busy	2	0:00:13	0:00:11	
CONFDC	Conference Disconnect	4	0:36:33	0:36:33	
CONFFL	Conference Failed	3	0:00:51	00:00:00	
EXTCNT	External Number Conn	6	0:05:04	0:05:04	
NA	No Answer Auto	1	0:00:42	00:00:00	
NI	Not Interested	15	0:03:47	0:01:02	
SKIP	Lead Skipped	4	00:00:00	00:00:00	
TRASH	Lead Trashed	1	00:00:00	00:00:00	
UA	Unknown Auto	3	0:00:11	00:00:00	
TOTALS		45	0:48:12	0:43:19	

Figure 191 Outbound Call Status Stats

10.3.2 Outbound CDR Report

This section provides information about Outbound CDR Reports that helps you to access the various calls details of the outbound calls using the search filters.

To view the Outbound CDR Report, do the following:

- *Viewing Outbound CDR Report*

10.3.2.1 Viewing Outbound CDR Reports

Set the search criteria to view the outbound call details report.

To view the Outbound CDR Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, and click **Outbound CDR Reports**.



Figure 192 Outbound CDR Report menu

3. Outbound CDR Reports screen appears.
4. The screen is bifurcated into three sections; Outbound CDR Report Filter, Email Report Configuration Details, and Outbound CDR Reports Detail.
 - Outbound CDR Report Filter - Provides a way to search Outbound CDR Report using search criteria, such as Date and Time, Agent, Campaign, Call Category, Agent, Duration, and Phone Number, and so on.
 - Email Report Configuration Details – Provides a way to schedule email to get the report and a list view of all scheduled reports.

- Outbound CDR Reports List – Provides a list view of Outbound CDR report, in addition to downloading CSV and Excel formats of report.

The screenshot shows the 'Report Management' interface for 'Outbound CDR Report'. At the top right, the server time is '2022-08-12 12:05:45'. The search filters include: From Time (00:00 on 2022-01-01), To Time (23:59 on 2022-08-12), Campaign (---ALL---), Call Category (All), Status (---ALL---, A - Answering Machine, A12 - test), Agent (--Select Agent--), Duration (---Select Duration---), Phone Number, and Agent Dialed Type (ALL). A 'SUBMIT' button is present. Below the filters is the 'Email Report Configuration Details' section with an 'Email Scheduling' button. A table header shows columns for #, From, Frequency Type, Email Time, ACTIVE/INACTIVE, MODIFY, and DELETE. A message states 'No Email Report Schedule Found'. At the bottom, there are buttons for 'CSV', 'Excel', and 'Refresh', and a 'Number of Records : 1254' indicator. The main data table has columns: #, List, Campaign, Call Date, User, Extension, Phone Number, Type of Call, Hold Duration, Total Duration, Talk Duration, Call Disposition, Status, Customer Dispo Status, Term Reason, Customer Time, UniqueID, and Play/Download Recording.

#	List	Campaign	Call Date	User	Extension	Phone Number	Type of Call	Hold Duration	Total Duration	Talk Duration	Call Disposition	Status	Customer Dispo Status	Term Reason	Customer Time	UniqueID	Play/Download Recording
1	2001	C-INBman - C-INBman	2022-07-13 17:57:46	U9001	7001	3330001	Abandoned	00:02:24	0:03:09	0:02:51	00:00:08	Browser Close		AGENT	2022-07-13 17:57:46	HYBDORG1657715266931453	Play/Download
2	2001	C-INBman - C-INBman	2022-07-14 11:29:26	U9001	9001	3330001	Abandoned	00:01:27	0:04:40	0:04:25	00:00:28	Busy		CALLER	2022-07-14 11:29:26	HYBDORG1657778366455001	Play/Download
3	2003	C-Progrs - C-Progrs	2022-07-13 12:12:24	U9001	9001	3330001	Answered	00:01:12	0:01:41	0:01:33	00:00:17	Not Interested		AGENT	2022-07-13 12:12:24	HYBDORG1657694544445850	Play/Download
4	2001	C-INBman - C-INBman	2022-07-14 11:44:57	U9001	9001	3330001	Answered	00:01:06	0:02:51	0:00:18	00:00:07	Leaved Conference		AGENT	2022-07-14 11:44:57	HYBDORG165779297537164	Play/Download

Figure 193 Outbound CDR Report

5. Use the search filters, such as select date and time, campaign, and agent, and so on to view report.
6. Click **Submit**.
7. Outbound Report is generated using the search criteria.
8. You can be downloaded in two formats:
 - a. Export to CSV
 - b. Export to Excel

Table 53 Outbound CDR Report parameters

Parameters	Description
List	Displays the List numbers used to dial the customers for the selected Campaign.
Campaign	Displays the Campaign name in which the agent has logged in and dialed the calls.
Call Date	Displays the date and time the customer has called the agent.

Parameters	Description
User	Displays the user name used by the agent to log in to the system. Sometimes it could be VDAD for outbound abounded calls.
Extension	Displays the extension number used by the agent.
Phone Number	Displays the customer number through which the call is dialed by the Agent or System.
Type of Call	Identify the type of call like Answered call or abandoned call.
Hold Duration	This is the total time duration for which the customer is on hold during the call.
Total Duration	Displays the total duration (Talk time + Ringing time) of the customer's call.
Talk Duration	Displays the total duration, the customer had talked with the agent.
Queue Duration	Displays the duration, the customer is in queue to talk to the agent.
Call Disposition Duration	This is the total time duration between disconnecting the call and submitting the disposition.
Status	Displays the disposition status selected by the agent for the call. Some calls might be auto disposed by the system, where the status is entered by the system. For example, if campaign is configure for Auto Disposition, then two statuses are available, namely "Auto Dispo Success Calls " for success calls and "Auto Dispo Fail Calls "for fail calls.
Customer Dispo Status	Displays the feedback from the customer gives in case the call is diverted to the feedback menu by the agent.
Term Reason	Displays the reason of the call ended by the Agent or Customer.
Customer Time	Displays the date and time of the customer d on his location/country.
Unique ID	Displays the unique ID generated by Neox for each call.
Play/Download Recording	Allows playing/downloading call recording file by clicking on the Play/Download .

10.3.3 Outbound Activity Report

This section provides the details of the Outbound Activity Report that enables the administrator to view outbound calls activity report for each campaign. The report helps you in understanding the total number of outgoing calls, and bifurcation of the calls based on human answered and non-human answered calls, including the details of call handled time and talk duration.

To view the Outbound Activity Report, do the following:

- *Viewing Outbound Activity Report*

10.3.3.1 Viewing Outbound Activity Report

To view the Outbound Activity Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, and click **Outbound Activity Report**.

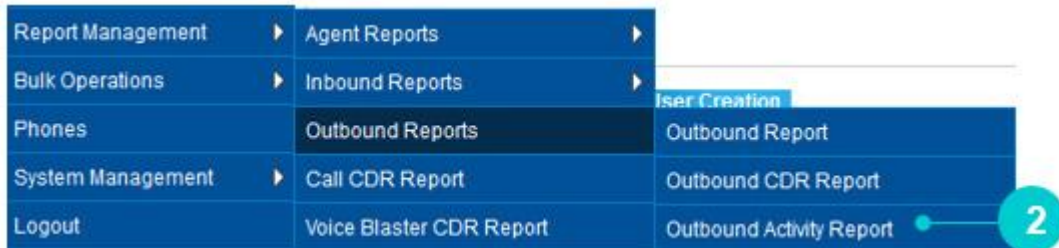


Figure 194 Outbound Activity Report menu

3. Outbound Activity Report screen appears.
4. The screen is bifurcated into three sections; Outbound Activity Report Filter, Email Report Configuration Details, and Outbound Activity Report Detail.
 - Outbound Activity Filter - Provides a way to search Outbound Activity Summary Report using search criteria, such as Date and Time and Campaign.
 - Email Report Configuration Details – Provides a way to schedule email to get the report and a list view of all scheduled reports.

- **Outbound Activity Report Per Campaign** – Provides a list view of Outbound Activity report for each campaign, in addition to downloading CSV, PDF, and Excel formats of report.

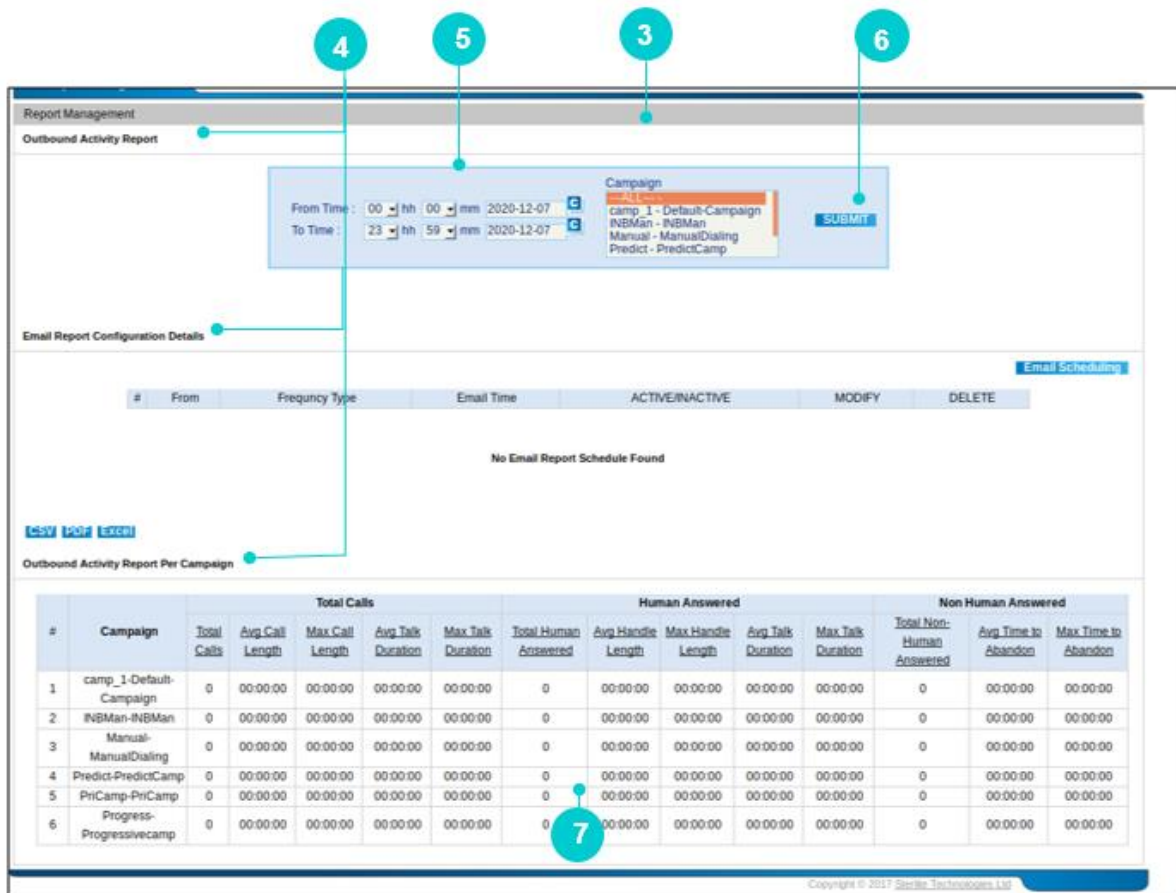


Figure 195 Outbound Activity Report Per Campaign

5. Use the search filters, such as select date and time and campaign inbound groups to view report.
6. Click **Submit**.
7. Outbound Activity Report Per Campaign is generated using the search criteria.
8. You can also download the report in CSV, PDF, and Excel format.

Table 54 Outbound CDR Report parameters

Parameters	Description
Campaign	Displays the campaign name for which you have generated the report.
Total calls	Displays the total number of outbound calls made by the agent.
Avg call length	Displays the average call length (talk duration + disposition) for a particular campaign.
Max call length	Displays the maximum call length (talk duration + disposition) for a particular campaign.

Parameters	Description
Avg talk duration	Displays the average talk time between the agent and customer in a particular campaign.
Max talk duration	Displays the maximum talk duration between the agent and customer in a particular campaign.
Total human answered	Displays the total number of calls answered by the customer.
Avg call length	Displays the average call length (talk duration + disposition) for a particular campaign.
Max call length	Displays the maximum call length (talk duration + disposition) for a particular campaign.
Avg talk duration	Displays the average time the agent talks to the customer in a particular campaign.
Max talk duration	Displays the maximum time the agent talks to the customer in a particular campaign.
Total non-human answered	Displays the total number of calls not answered by the customer.
Avg time to abandon	Displays the average time the agent waited before disconnecting the call for a particular campaign.
Max time to abandon	Displays the maximum time the agent waited before disconnecting the call for a particular campaign.

10.4 Call CDR Report

This section provides Call Details Report (CDR) that contains the detailed information about the calls. CDR helps administrator to access the various calls details, which includes both incoming and outgoing calls of the callers. Further, the report can be downloaded in CSV and Excel format.

To view the CDR Report, do the following:

- *Viewing CDR Report*

10.4.1 Viewing CDR Report

Set the search criteria to view the report for the selective time period and campaign and so on. This report is generated only after the agent finishes a call.

To view the CDR Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Call CDR Report**.



Figure 196 Call CDR Report menu

3. Call CDR Report screen appears.
4. Use the search filters, such as select date and time, and Campaign and so on to view the report of the calls.
5. Click **Submit**.

 A screenshot of the 'Call CDR Report' search filters interface. The interface is light blue and contains several input fields and dropdown menus. On the left, there are 'From Time' and 'To Time' fields with time and date pickers. Below them is a 'Status' dropdown menu. In the center, there is an 'Inbound Group' dropdown menu. To the right of that are 'Call Category', 'Agent', and 'Duration' dropdown menus. Below these are 'Phone Number', 'Agent Dialed Type', and 'Call Rank' dropdown menus. On the far right, there is a 'Campaign' dropdown menu and a blue 'SUBMIT' button. Red circles with numbers 4, 3, and 5 are overlaid on the image, pointing to the 'From Time' field, the 'Inbound Group' dropdown, and the 'SUBMIT' button respectively.

Figure 197 Call CDR Report

- 6. Call CDR Report is generated using the search criteria.
- 7. Play/download recording as shown below.



#	List	DID Line	Campaign	Inbound Group	Call Date	User	Extension	Phone Number	Type of Call	Hold Duration	Total Duration	Talk Duration	Call Disposition	Status	Customer Dispo Status	Term Reason	Customer Time	Abandoned Time	UniqueID	Comments	Call Rank	Play/Download Recording	Sa
1	2001		C-INBman-C-INBman	-	2022-07-13 17:57:46	U9001	7001	3330001	Abandoned	00:02:24	00:03:09	00:02:51	00:00:08	Browser Close		AGENT	2022-07-13 17:57:46		HYBDORG1657715266931453		Not Ranked	Play/Download	Sa
2	2001		C-INBman-C-INBman	-	2022-07-14 11:29:26	U9001	9001	3330001	Abandoned	00:01:27	00:04:40	00:04:25	00:00:28	Busy		CALLER	2022-07-14 11:29:26		HYBDORG165778366455001		Not Ranked	Play/Download	Sa
3	2003		C-Progrs-C-Progrs	-	2022-07-13 12:12:24	U9001	9001	3330001	Answered	00:01:12	00:01:41	00:01:33	00:00:17	Not Interested		AGENT	2022-07-13 12:12:24		HYBDORG1657694544445850		Not Ranked	Play/Download	Sa
4	2001		C-INBman-C-INBman	-	2022-07-14 11:44:57	U9001	9001	3330001	Answered	00:01:06	00:02:51	00:00:18	00:00:07	Leaved Conference		AGENT	2022-07-14 11:44:57		HYBDORG1657779297537164		Not Ranked	Play/Download	Sa
5	2001		C-INBman-C-INBman	-	2022-07-13 17:49:05	U9001	7001	3330001	Answered	00:00:55	00:01:23	00:00:45	00:06:19	Call Transferred		AGENT	2022-07-13 17:49:05		HYBDORG1657714745712704		Not Ranked	Play/Download	Sa
6	2001	777	C-INBman-sales-sales-Group	-	2022-07-12 18:33:44	U9001	9001	3330001	Answered	00:00:55	00:01:34	00:01:22	00:00:10	Not Interested		AGENT	2022-07-12 18:33:44		CI1657631024497		Not Ranked	Play/Download	Sa

Figure 198 Call CDR Report

Table 55 Call CDR Report Parameters

Parameters	Description
DID line	The DID number the customer calls land on.
Campaign	The campaign the agent belongs to.
Inbound Group	The In-group the agent is logged in.
Call Date	The date and time the customer called on or Dialed on.
User	The agent’s User name which is used to login to the system. Some time you can see system user VDCL or VDAD. VDCL use for inbound abounded calls and VDAD use for outbound abounded calls.
Extension	The extension number used by the agent for handle the calls.
Phone Number	The customer number from which the call came or dialed on.
Type of Call	Identify the type of call like Answered or abandoned call.
Hold Duration	This is the total time duration for which the customer is on hold during the call.
Total Duration	The talk time + queue or talk time+ Ringing time of the customer.
Talk Duration	The time duration that customer was on call with the agent.
Call Disposition Duration	This is the total time duration between disconnecting the call and submitting the disposition.
Status	The disposition status the agent selects for the call.

Parameters	Description
Customer Dispo Status	Specifies the feedback the customer gives in case the call is diverted to the feedback menu by the agent.
Term Reason	The call ended by Agent or Customer.
Customer Time	The date and time the customer called on.
Abandon Time	The time duration the call was in queue before it was disconnected.
Unique ID	The unique ID generated by Neox for each call.
Comments	Displays comments received by the customer during the call.
Call Rank	Allows ranking the agent's performance based on the customer's experience through call recording. You can give rank for each call by selecting a value between 0 and 5. Click Save to save the rank. You can leave this field blank if do not want to rank the agent. The ranking is done based on the call recording with the customer. The rank mentioned here is also displayed while downloading the report and the average of the rank is displayed in Agent Performance Report. For example, if ranks for calls are as following: call 1 = 2 call 2 = 3 The average rank will be 2.5 (rank of call 1 + rank of call 2)/total number of ranked calls.
Play/Download Recording	Contains the call recording file which can be played or downloaded by clicking on the Play/download recording.
Custom Fields	Displays all custom fields.

CDR Report looks like the following:

#	Line	DID Line	Campaign	Inbound Group	Call Date	User	Extension	Phone Number	Type of Call	Hold Duration	Total Duration	Talk Duration	Disposition	Status	Customer Dispo Status	Term Reason	Customer Time	Abandoned Time	Unique ID	Comments	Call Rank	2001	
1	2001	C-INBans-G-INP	-	*2-08-04 13:13	U9001	9001	3330001	Abandoned	00:00:24	00:00:45	00:00:30	00:00:17	Browser Close	AGENT	*2-08-04 13:17:28	HYBDORG165959648146556				Not Ranked	test	start	02
2	2001	C-INBans-G-INP	-	*2-08-04 18:17	U9001	9001	3330001	Abandoned	00:00:23	00:00:40	00:00:32	00:00:10	Browser Close	AGENT	*2-08-04 18:12:52	HYBDORG165961697522315				Not Ranked	test	start	02
3	2001	C-INBans-G-INP	-	*2-08-04 12:27	U9001	9001	3330001	Abandoned	00:00:21	00:00:36	00:00:28	00:00:00	Browser Close	AGENT	*2-08-04 12:22:36	HYBDORG16595956612066				Not Ranked	test	start	02
4	2001	C-INBans-G-INP	-	*2-08-05 10:37	U9001	9001	3330001	Abandoned	00:00:20	00:01:13	00:00:55	00:00:00	Browser Close	AGENT	*2-08-05 10:31:15	HYBDORG1659675673893747				Not Ranked	test	start	02
5	2001	C-INBans-G-INP	-	*2-08-04 11:39	U9001	9001	3330001	Abandoned	00:00:16	00:00:45	00:00:40	00:00:10	Browser Close	AGENT	*2-08-04 11:32:35	HYBDORG1659592059972208				Not Ranked	test	start	02
6	2001	C-INBans-G-INP	-	*2-08-04 18:42	U9001	9001	3330001	Abandoned	00:00:13	00:00:30	00:00:23	00:00:00	Browser Close	AGENT	*2-08-04 18:42:02	HYBDORG165961872262518				Not Ranked	test	start	02
7	2001	C-INBans-G-INP	-	*2-08-04 12:39	U9001	9001	3330001	Abandoned	00:00:13	00:00:33	00:00:25	00:00:10	Browser Close	AGENT	*2-08-04 12:26:32	HYBDORG1659596192345376				Not Ranked	test	start	02
8	2001	C-INBans-G-INP	-	*2-08-04 12:39	U9001	9001	3330001	Abandoned	00:00:12	00:00:52	00:00:44	00:00:00	Browser Close	AGENT	*2-08-04 12:39:54	HYBDORG1659596454930739				Not Ranked	test	start	02

Figure 199 CDR Report

10.5 Voice Blaster CDR Report

This section provides Voice Blaster CDR Report that contains the detailed information about the calls initiated by Neox as part of the Voice Blaster Campaign. A record contains detailed information about a call, such as List, Campaign, Call Date, Phone number, Total Duration, Talk Duration, Status, Term Reason, and Customer and so on. Further, the report can be downloaded in CSV and Excel format.

To view the Voice Blaster CDR Report, do the following:

- *Viewing Voice Blaster CDR Report*

10.5.1 Viewing Voice Blaster CDR Report

Set the search criteria to view the report for the selective time period and campaign and so on. This report is generated only after a call is finished by the system.

To view the Voice Blaster CDR Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Voice Blaster CDR Report**.



Figure 200 Voice Blaster CDR Report menu

3. Voice Blaster CDR Report screen appears.
4. Use the search filters, such as select date and time, and Campaign and so on to view the report of the calls.
5. Click **Submit**.

Voice Blaster CDR Report

From Time : 00 hh 00 mm 2020-01-17

To Time : 23 hh 59 mm 2020-01-20

Campaign : --NONE--

Call Category : All

Agent : --Select Agent--

Duration : --Select Duration--

Phone Number :

Call Menu : --Select Callmenu--

SUBMIT

Figure 201 Voice Blaster CDR Report

- 6. Voice Blaster CDR Report is generated using the search criteria.
- 7. You can play or download the Voice Blaster CDR call recorded by clicking Play/Download.

#	List	Campaign	Call Date	User	Extension	Phone Number	Type of Call	Total Duration	Talk Duration	Status	Customer Dispo Status	Term Reason	Customer Time	Call Menu	Digit	Description	Play/Download Recording
1	7002	kafkavoi - kafka-voiceblaster	2022-08-01 15:05:42			9898989898	Abandoned	0:00:07	00:00:00	Unknown Auto		AGENT	2022-08-01 15:05:42				Play/Download
2	7002	kafkavoi - kafka-voiceblaster	2022-08-01 15:05:35			9898989898	Abandoned	0:00:06	00:00:00	Unknown Auto		AGENT	2022-08-01 15:05:35				Play/Download
3	7002	kafkavoi - kafka-voiceblaster	2022-08-01 15:05:27			9898989898	Abandoned	0:00:06	00:00:00	Unknown Auto		AGENT	2022-08-01 15:05:27				Play/Download
4	7002	kafkavoi - kafka-voiceblaster	2022-08-01 15:05:19			9898989898	Abandoned	0:00:06	00:00:00	Unknown Auto		AGENT	2022-08-01 15:05:19				Play/Download
5	7002	kafkavoi - kafka-voiceblaster	2022-08-01 15:05:11			9898989898	Abandoned	0:00:07	00:00:00	Unknown Auto		AGENT	2022-08-01 15:05:11				Play/Download

Figure 202 Voice Blaster CDR Report

Table 56 Voice Blaster CDR Report Parameters

Parameters	Description
Campaign	Displays the campaign selected for voice blaster.
Call Date	Displays the date and time the customer called on.
User	Displays the agent’s name as “VDAD” as no agent is needed for voice blaster.
Extension	Displays the dummy extension number used in case of voice blaster or to be directed to an agent.
Phone Number	Displays the customer number on which the call is made.
Type of Call	Identify the type of call like answered call or abandoned call.
Total Duration	Displays the total duration (Talk Time + Dialing/Ringing time) of the call.
Talk Duration	Displays the time duration the customer was on the voice blaster call.
Status	Displays the status of the call like disconnected on IVR, customer not available, Busy Auto and so on.
Term Reason	Displays the reason of the call ended by System or Customer.
Customer Time	Displays the date and time when the customer is called.
Call menu	Displays the call menu on which call is routed to.
Digit	Displays the digits (inputs) pressed by the customer.

Parameters	Description
Description	Displays the description of the digits pressed.
Play/Download Recording	You can play or download the Voice Blaster CDR call recorded by clicking Play/Download .

10.6 Advance Reports

This section provides details about the Advance Reports that contains the detailed information about the various types of reports, such as Rejected and Not Answer Call CDR, Inbound Transition, External Extension CDR, Callback Report, and Call CDR with Transfer.

To view the Advance Reports, do the following:

- *Viewing Advance Reports*

10.6.1 Viewing Advance Report

You can search details of the report from the displayed list.

To view the Advance Report

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Advance Reports**.



Figure 203 Advance Reports menu

3. Advance Reports Report screen appears.
4. The screen is bifurcated into two sections; Search for Custom Report and Custom Report Listing.
 - Search for Custom Report Listing- Provides a way to search Custom Report using search criteria, such as Report Name.
 - Custom Report Listing – Provides a list view of Custom Reports with the details, such as Report Name, Creation Date, and Last Modification Date. In addition, you can view details of the report by clicking **View**.

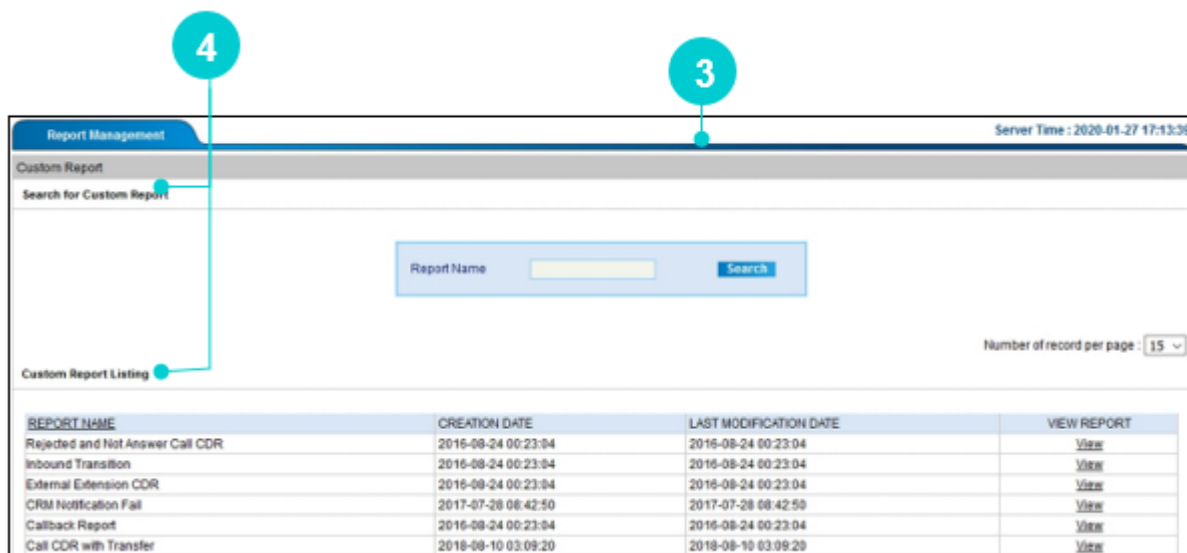


Figure 204 Agent Performance Report

5. The detailed information displays as follows.

	DID	Inbound_Group	Call_Date	User	Phone_Number	Queue_Second	Status
1	98569	TestNM	2019-12-26 19:48:30	TestM	9377224505	9.00	AB
2	71200905	AOHDesk	2019-11-17 02:54:37	atuld	919819735599	25.00	UA
3	71200900	TechnicalQuery	2019-11-17 00:29:04	rahuld	9830567492	6.00	NA
4	71200910	B2C	2019-11-16 22:45:58	rahuld	2249097800	6.00	NA
5	71200910	B2C	2019-11-16 22:12:44	AmeyM	2249097800	4.00	NA
6	71200902	BranchDesk	2019-11-16 21:34:24	Minrajb	91968887711	25.00	UA
7	71200902	BranchDesk	2019-11-16 20:53:03	Minrajb	9619258189	25.00	UA
8	71200910	B2C	2019-11-16 20:51:23	sunitgade	2249097800	25.00	UA
9	71200900	International	2019-11-16 20:46:18	ajinkya	919480759492	5.00	NA
10	71200900	Domestic	2019-11-16 19:47:14	prakashg	1942478993	8.00	NA
11	71200905	AOHDesk	2019-11-16 19:26:14		917506100127	1.00	UA
12	71200910	B2C	2019-11-16 19:25:50		2249097800	1.00	UA
13	71200900	Domestic	2019-11-16 19:24:39	ajinkya	917006493343	25.00	UA
14	71200910	B2C	2019-11-16 19:25:24		2249097800	1.00	UA
15	71200910	B2C	2019-11-16 19:05:59		2249097800	1.00	UA

Figure 205 Custom Report

10.6.1.1 Reports Types

Following types of reports are supported in Neox DC. To view the reports, click **View**.

10.6.1.1.1 Rejected and Not Answer Call CDR

The Rejected and Not Answer Call CDR Report contains the calls, which are either rejected by the agent or which are not answered by the agent. Whenever the incoming call is landing to the agent and if the agent clicks on the hang-up button then it is displayed in this report. Also, if the agent does not answer the call and the ring timeout has reached then it is reflected in the report.

Table 57 Rejected and Not Answer Call CDR

Parameters	Descriptions
DID	Displays the DID number dialed by the customer.
Inbound Group	Displays the Inbound Group in which the call has landed.
Call Date	Displays the date and timing of the call.
User	Displays the user name of the agent to whom the call has landed.

Parameters	Descriptions
Phone Number	Displays the Phone number of the customer who has dialed the DID.
Queue Seconds	Displays the queue duration of the call.
Status	Displays the status of the call, either it is UA (Unknown auto) or RA (Reject Auto).
Unique ID	Displays the Unique ID of the call. Every call has a unique id.

Report Management
Server Time : 2020-01-27 17:5

Custom Report

Rejected and Not Answer Call CDR

Custom Report							
	DID	Inbound_Group	Call_Date	User	Phone_Number	Queue_Second	Status
1	71	AOHDesk	2019-10-13 01:16:19		91	25.00	UA
2	71	AOHDesk	2019-10-12 22:42:46		91	25.00	UA
3	71	AOHDesk	2019-09-21 22:17:06		91	25.00	UA
4	71	AOHDesk	2019-09-21 21:36:50		88	25.00	UA
5	71	AOHDesk	2019-09-20 23:35:06		91	25.00	UA
6	71	AOHDesk	2019-09-20 22:56:12		91	25.00	UA
7	71	AOHDesk	2019-09-20 22:24:00		77	25.00	UA
8	71	AOHDesk	2019-09-20 20:31:53		96	25.00	UA
9	71	AOHDesk	2019-09-20 20:14:04		96	25.00	UA
10	71	AOHDesk	2019-09-20 00:50:03		88	25.00	UA
11	71	AOHDesk	2019-09-19 23:41:44		18	25.00	UA
12	71	AOHDesk	2019-09-19 23:29:47		91	25.00	UA
13	71	AOHDesk	2019-09-19 22:20:58		91	25.00	UA
14	71	AOHDesk	2019-09-19 21:15:16		85	25.00	UA
15	71	AOHDesk	2019-09-19 21:11:37		91	25.00	UA

< >
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Figure 206 Rejected and Not Answer Call CDR

10.6.1.1.2 Inbound Transition

The Inbound Transition Report describes the inbound call flow of the call with its transition. The transition includes the call menu including the IVR flow, digit pressed by the customer, call transferred to the agent, and then the live call. The whole call flow is displayed in the report.

	Uniqueid	Entry_Date	Digit_Pressed	Option_Description	Stage	Call_Type	Call_Data
1	CI1579624577872	2020-01-21 22:06:20	1		IVR	CALLMENU	Welcome_Menu
2	CI1579624577872	2020-01-21 22:06:17			IVR	CALLMENU	Welcome_Menu
3	CI1579624566261	2020-01-21 22:06:07	1		IVR	CALLMENU	Welcome_Menu
4	CI1579624566261	2020-01-21 22:06:06			IVR	CALLMENU	Welcome_Menu
5	CI1579624547879	2020-01-21 22:05:51	2		IVR	CALLMENU	Welcome_Menu
6	CI1579624547879	2020-01-21 22:05:47			IVR	CALLMENU	Welcome_Menu
7	CI1579624535709	2020-01-21 22:05:37	1		IVR	CALLMENU	Welcome_Menu
8	CI1579624535709	2020-01-21 22:05:35			IVR	CALLMENU	Welcome_Menu
9	CI1579624496974	2020-01-21 22:04:58	1		IVR	CALLMENU	Welcome_Menu
10	CI1579624496974	2020-01-21 22:04:56			IVR	CALLMENU	Welcome_Menu
11	CI1579624484743	2020-01-21 22:04:45	1		IVR	CALLMENU	Welcome_Menu
12	CI1579624484743	2020-01-21 22:04:44			IVR	CALLMENU	Welcome_Menu
13	CI1579624445748	2020-01-21 22:04:09	1		IVR	CALLMENU	Welcome_Menu
14	CI1579624445748	2020-01-21 22:04:05			IVR	CALLMENU	Welcome_Menu
15	CI1579624436680	2020-01-21 22:03:57	1		IVR	CALLMENU	Welcome_Menu

Figure 207 Inbound Transition

Table 58 Inbound Transition

Parameters	Descriptions
Unique ID	Displays the unique id of the call
Entry Date	Displays the date and time of the event of the call. Example at what time the call is in IVR, time at which the customer pressed the digit etc.
Digit pressed	Displays the digit pressed by the customer in call menu
Option Description	Displays the description of the option which is specified while creating the call menu
Stage	Displays the stage of the call i.e. IVR, LIVE, AGENTRSVD etc.
Call Type	Displays the type of the call, either it will be a call menu, DID etc. depending on the route of the call defined.
Call Data	Displays the name of the call menu specified in the call type.

10.6.1.1.3 External Extension CDR

The External Extension CDR Report contains the data of the calls, which are having the Perl only setup or having the permanent Agent login in which no GUI is used, that is the status having the AGTCNT is displayed in this report.

Table 59 External Extension CDR

Parameters	Descriptions
List ID	Displays the ID of the list.
Campaign ID	Displays the Campaign ID of the campaign through which the external number was connected.
Call Time	Displays the call time and date at which the external number was connected.
User	Displays the name of user which has initiated the call of external number.
External Extension	Displays the external extension number which was connected by the agent.
Customer Number	Displays the customer number in the report.
Call Duration	Displays the duration of the call.
Status	Displays the status the call i.e. agent connected.
Term Reason	Displays who disconnected the call either caller or agent.
Customer Time	Displays who disconnected the call either caller or agent.
Unique ID	Displays the unique ID of the call. Every call has a unique id which is generated by the system.

10.6.1.1.4 Callback Report

The Call back Report displays data of all the callbacks scheduled by the agent with their status as either Active or Inactive. Whenever the agent clicks the disposition callback, and enters the time, date and comments for callback, then the admin is able to monitor from the callback report in custom reports. The report will also contain the custom fields inserted by the agent for that particular call.

	Call_Date	Callback_Date	List_ID	Campaign	Callback_Status	Status	Phone_Number
1	2020-01-16 19:41:38	2020-01-17 00:00:00	4000	AOH	LIVE	NI	123456
2	2020-01-16 19:44:07	2020-01-17 00:00:00	4000	AOH	LIVE	NI	123456
3	2020-01-22 19:42:15	2020-01-22 19:40:00	112	66294895	LIVE	CALLBK	123456
4	2020-01-22 19:43:08	2020-01-22 19:45:00	4000	AOH	INACTIVE	CALLBK	12345

Figure 208 Callback Report

Table 60 Callback Report Parameters

Parameters	Descriptions
Call Date	Displays the call date and time.
Callback Date	Displays the scheduled Callback date and time requested by the customer.
List ID	Displays the list id which is bind to the campaign in which agent is logged in.
Campaign	Displays the name of the campaign.
Call back status	Displays the status of the call back. If the call back is having future time, then it will be ACTIVE and for all the past call-backs it will be INACTIVE.
Status	Displays the status the call that is last dialed.
Phone Number	Displays the customer phone number.
User	Display the Agent name who has set the callback.
First Name	Display the data as per the uploaded lead in list or entered by the Agent during the call.
Last Name	
Address	
Area	

Parameters	Descriptions
City	
Region	
Email Address	
Reference ID	
Comment	
Contact Person	
Entry Date	
Last Date	

10.6.1.1.5 Call CDR with Transfer

The Call CDR with Transfer Report displays the information of the calls transferred from one agent (transferor) to another (transferee) in the CDR Report.

The CDR Reports displays the following:

- XferType – Displays the Transfer Type of the call transferred to the Agent or DID.
- xfer_To – Displays the name of the Agent, External Number or Ingroup.
- xfer_from - Transferor name.

Call CDR with Transfer

TermReason	CustomerTime	UniqueID	RootID	XferType	xferTo	xferFrom
CALLER	2020-02-12 10:42:35	CI1581484355340	CI1581484355340			
CALLER	2020-02-12 10:23:51	CI1581483231576	CI1581483231576			
CALLER	2020-02-12 10:08:09	DP1581482289471920	CI1581482248294	AGENT		payal
AGENT	2020-02-12 10:07:28	CI1581482248294	CI1581482248294		nikunj	
AGENT	2020-02-12 10:02:12	HYBDORG1581481932818466				
AGENT	2020-02-11 19:07:59	CI1581428279358	CI1581428279358			
AGENT	2020-02-11 18:53:37	HYBDORG1581427417418428				
AGENT	2020-02-11 18:53:24	DP1581427404669035	CI1581427365242	AGENT		mhir
CALLER	2020-02-11 18:53:23	CI1581427403936	CI1581427403936			
AGENT	2020-02-11 18:52:45	CI1581427365242	CI1581427365242		amit	
AGENT	2020-02-11 18:34:41	HYBDORG1581426281432551				
AGENT	2020-02-11 18:34:14	HYBDORG1581426254289087				
CALLER	2020-02-11 18:33:00	HYBDORG1581426180067812				
CALLER	2020-02-11 18:32:16	HYBDORG1581426136417447				
CALLER	2020-02-11 18:31:27	CI1581426087725	CI1581426087725			

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Figure 209 Call CDR with Transfer

10.7 Audit Report

This section provides details about the Audit Report that contains the detailed information about the various actions, such as View performed in different reports. Further, the report can be downloaded in CSV and Excel format.

To view the Audit Report, do the following:

- *Viewing Audit Report*

10.7.1 Viewing Audit Report

Set the search criteria to view the report for the selective time period, username, so on. This report is generated only after the agent performs an activity.

To view the Audit Report:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Report Management**, click **Audit Reports**.



Figure 210 Audit Report menu

3. Audit Report screen appears.
4. Use the search filters, such as select date and time, and username and so on to view report of the agent's activity.
5. Click **Submit**.

The screenshot shows the 'Audit Report' screen in a web application. At the top, there's a 'Report Management' tab and a 'Server Time : 2020-01-20 15:33' indicator. Below the tab, there's a search form with fields for 'From Time', 'To Time', 'UserName', and 'Remote IP'. There are also dropdown menus for 'Module' and 'Action'. A red circle with the number '4' is placed over the search filters, and a red circle with the number '5' is placed over the 'SUBMIT' button. Below the search form, there are buttons for 'CSV', 'Excel', and 'Refresh', and a 'Number of Records : 37' indicator. At the bottom, there's a table with 11 columns: '#', 'UserName', 'Remote IP', 'Access Time', 'Module', 'Action', and 'Request Parameters'. The table contains 11 rows of data.

#	UserName	Remote IP	Access Time	Module	Action	Request Parameters
1	admin	10.121.42.254	2020-01-20 15:35:36	Audit Report	VIEW	{'ADD' => '919114', ...}
2	admin	10.121.42.254	2020-01-20 15:33:49	Custom Report	VIEW	{'ADD' => '92933', 'report_id' => '3', ...}
3	admin	10.121.42.254	2020-01-20 15:28:01	Custom Report	VIEW	{'ADD' => '92911', ...}
4	admin	10.121.42.254	2020-01-20 15:26:04	Custom Report	VIEW	{'ADD' => '92933', 'report_id' => '4', ...}
5	admin	10.121.42.254	2020-01-20 15:25:58	Custom Report	VIEW	{'ADD' => '92933', 'report_id' => '5', ...}
6	admin	10.121.42.254	2020-01-20 15:25:44	Custom Report	VIEW	{'ADD' => '92911', ...}
7	admin	10.121.42.254	2020-01-20 15:25:27	Outbound Report	VIEW	{'agent_hours' => '', 'DB' => '', 'outbound...
8	admin	10.121.42.254	2020-01-20 15:25:19	Outbound Report	VIEW	{'ADD' => '90903', ...}
9	admin	10.121.42.254	2020-01-20 15:24:43	Outbound Activity Report	VIEW	{'ADD' => '919112', ...}
10	admin	10.121.42.254	2020-01-20 15:24:10	Custom Report	VIEW	{'ADD' => '92911', ...}
11	admin	10.121.42.254	2020-01-20 15:24:10	Custom Report	VIEW	{'ADD' => '92911', ...}

Figure 211 Audit Report

Table 61 Audit Report

Parameters	Description
User Name	Displays the user name who performed the activity.
Report IP	Displays the report IP from where the activity is performed.
Access Time	Displays the date and time of the activity.
Module	Displays the module name on which the activity is performed.
Action	Displays the action type performed on module by the user.
Request Parameter	Displays the full request parameter which is executed by the system.

11. Bulk Operations

This chapter provides information about Bulk Operations that helps you in managing User Group, In-Group, Phones and Users at once. This enables you in performing bulk operation, such as moving agents from one User Group or In-Group to another from a single screen. Moreover, you can create Phone Numbers and Users in a customized pattern by defining the configurations according to your requirements. Bulk Operations make management of data easy that are available in larger quantities in your organization.

Contents:

- *Bulk User - Usergroup Management*
- *Bulk User - Ingroup Management*
- *Bulk Phone Creation*
- *Bulk User Creation*

11.1 Bulk User – User Group Management

This section provides details about Bulk User – User Group Management that allow you to change the User Group of agents.

To change the User Group, do the following step:

- *Changing the User Group*

11.1.1 Changing the User Group

To change User Group:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Bulk Operations**, and then click **User – Usergroup Management**.



Figure 212 User – Usergroup Management menu

3. Bulk User - Usergroup Management screen appears.
4. The screen provides a consolidated view of all Users and User Groups created.
5. To change the User Group of a user, click the User Group corresponding to the User.

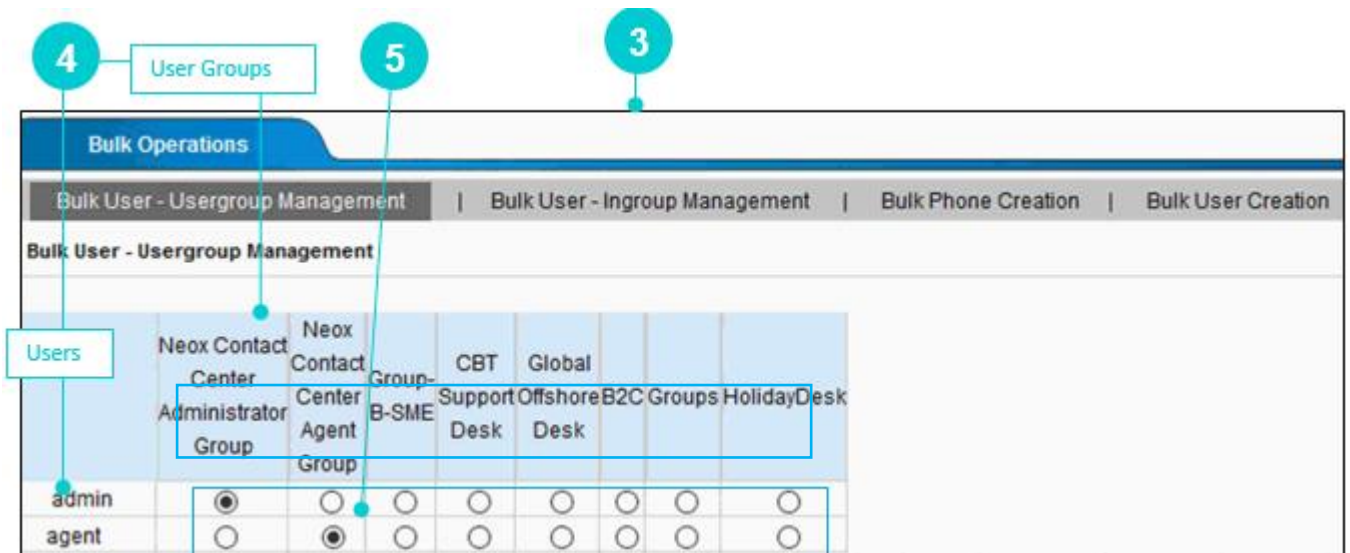
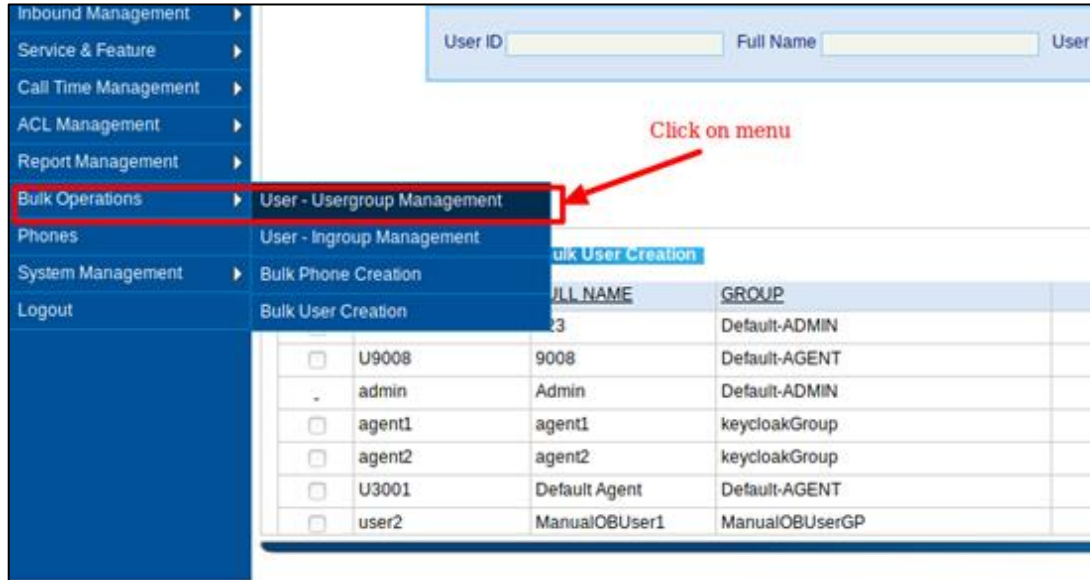


Figure 213 Bulk User - User Group Management

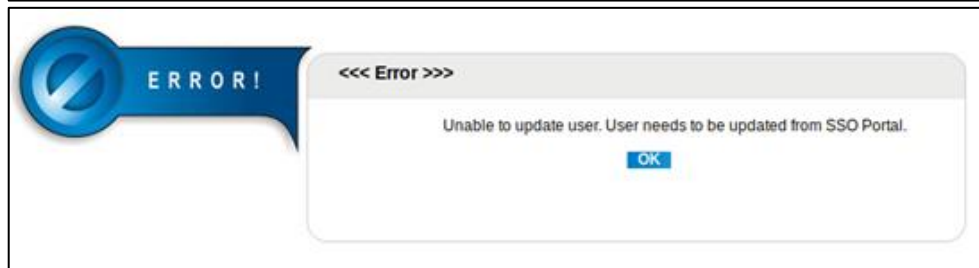
 **Note**

With SSO enabled, you cannot access **Bulk Operations → User Group Management** menu. Clicking this option displays the following error message.



The screenshot shows a navigation menu on the left with the following items: Inbound Management, Service & Feature, Call Time Management, ACL Management, Report Management, Bulk Operations, Phones, System Management, and Logout. The 'Bulk Operations' item is expanded, showing sub-items: User - Usergroup Management, User - Ingroup Management, Bulk Phone Creation, and Bulk User Creation. The 'User - Usergroup Management' sub-item is highlighted with a red box, and a red arrow points to it with the text 'Click on menu'. At the top right of the page, there are input fields for 'User ID', 'Full Name', and 'User'. Below the menu, a table is visible with columns 'FULL NAME' and 'GROUP'.

	FULL NAME	GROUP
<input type="checkbox"/>	U9008	9008
<input type="checkbox"/>	admin	Admin
<input type="checkbox"/>	agent1	agent1
<input type="checkbox"/>	agent2	agent2
<input type="checkbox"/>	U3001	Default Agent
<input type="checkbox"/>	user2	ManualOBUser1



The error dialog box has a blue circular icon with a white diagonal line. The text inside the dialog reads: 'ERROR! <<< Error >>> Unable to update user. User needs to be updated from SSO Portal. OK'.

11.2 Bulk User - Ingroup Management

This section provides details about Bulk User – In-Group Management that allow you to change the In Group of Agents.

To change the In-Group, do the following step:

- *Changing the In-Group*

11.2.1 Changing the In-Group

To change the In-Group:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Bulk Operations**, and then click **User – Ingroup Management**.



Figure 214 User – Ingroup Management menu

3. Bulk User - Ingroup Management screen appears.
4. The screen provides a consolidated view of all Users ID and In-Groups created.
5. To change the In-Group of a User, select the In-Group corresponding to the User ID. However, you can select only those in-groups that are allowed to the user based on the selected user group.

For example, DC1001 user is associated only with the In-Groups; AGENTDIRECT and SME, then you can select In-Groups only from the given options.

Users ID	Domestic	AGENTDIRECT	International	Other Products	Technical Query	Services	Branch Desk	SME	Railways	B2C	UAE
admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DC1000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DC1001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 215 Bulk User - User Group Management

11.3 Bulk Phone Creation

This section provides information about Bulk Phone Creation that allows you to create phone numbers in bulk. For this, you need to provide the configuration details to the system, to generate the phone numbers. After providing the phone number details, such as number of phone numbers, starting of the phone number and so on, system generates the phone numbers.

To create bulk phone numbers, do the following:

- *Creating Bulk Phone Numbers*

11.3.1 Creating Bulk Phone Numbers

To create bulk phone numbers:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Bulk Operations**, and then click **Bulk Phone Creation**.



Figure 216 Bulk Phone Creation menu

3. Bulk Phone Creation screen appears.

Enter the parameters as given in the table to create the phone numbers. The phone numbers created here are displayed in Phones.


 A screenshot of the 'Bulk Phone Creation' form. At the top, there is a breadcrumb trail: 'Bulk Operations' > 'Bulk User - Usergroup Management' > 'Bulk User - Ingroup Management' > 'Bulk Phone Creation' > 'Bulk User Creation'. The 'Bulk Phone Creation' tab is active. Below the breadcrumb is the 'Phone Detail' section with the following fields:

- Starting Phone Number *: 100 (digits only)
- Number Of Phone *: 2 (digits only)
- Agent Screen Login: Prefix, Sequence, Random. Below are input fields for 'DC' and an empty field.
- Login Password: Prefix, Sequence, Random. Below are input fields for an empty field and '100'.
- Active Account: Enable
- Local GMT: 5.50 (Do NOT Adjust for DST)

 A red circle with the number '3' points to the breadcrumb trail, and another red circle with the number '4' points to the 'SUBMIT' button at the bottom left.

Figure 217 Bulk Phone Creation

Table 62 Bulk Phone Creation parameters

Parameters	Description
Starting Phone Number *	<p>Enter at least three-digit phone number. System increments this phone number by 1, to create bulk phone numbers.</p> <p>For example, if you enter 100 and Number of Phone is 3, then three phone numbers are created, such as 100, 101, and 102 respectively. The phone number can be accessed from <i>Phones</i>.</p>
Number Of Phone *	<p>Enter the number of phone numbers to create.</p> <p>For example, if you enter 3 and Starting Phone Number is 100, then total three phone numbers are created, such as 100, 101, 102</p>
Agent Screen Login	<p>Define how you want to create the Phone Log in of the phone number. Select this option and enter at least three digits. The options are:</p> <ul style="list-style-type: none"> • Prefix – Add prefix to the Phone Log in of the phone number. For example, if Prefix is DC and Phone number is 100, then the Phone Log in of the phone number is DC100. • Sequence – Increments the Phone Log in of the phone number by 1. Enter at least three digits to create the Phone Log in. For example, if Sequence is 100, then Phone Log in will be 100, 101 and so on. • Random – Sets the Phone Log in randomly. <p>The Phone Log in created here is used by the agent to log in on Agent's portal.</p> <hr/> <p> Note You can select either Prefix and Sequence or Random at a time.</p>
Login Password	<p>Define the login password of the phone number. The password created here is used by the agent to log in on Agent's portal.</p>
Active Account	<p>Activate this phone number by enabling this option.</p>
Local GMT	<p>Select time zone for this phone number.</p>

- Once done, click **Submit**.
- Based on the phone number and user configuration, agent is able to log in to the portal.
 - Here, Phone Login and Phone Password is created from *Phones* or *Bulk Operations*>>*Bulk Phone Creation*.
 - User Login and User Password is created from *User Management*>>*User*.

The image shows a login interface for NEOX CONTACT CENTER. At the top left is the NEOX logo, a stylized 'C' with a blue and orange gradient. To its right is the text 'NEOX CONTACT CENTER'. Further right is a link that says 'Click Here To Change Password'. Below this header are five input fields: 'Phone Login' with the value 'AC000', 'Phone Password' with three dots, 'User Login' with the value 'agent', 'User Password' with five dots, and 'Campaign' with a dropdown menu showing '66294895 - Holiday'. To the right of the Campaign dropdown is a refresh icon. At the bottom right of the form area is a circular 'GO' button, which is highlighted with a dashed white border. A teal callout bubble with the number '5' is positioned to the right of the form, with a line pointing to the right edge of the form area.

Figure 218 Agent Log in Screen

11.4 Bulk User Creation

This section provides information about Bulk User Creation that allows you to create agents in bulk. For this, you need to provide the configuration details to the system, to generate the agents. After providing the user details, such as number of user id patterns, user id, number of users to be created and so on, system generates the agents.

To create bulk users, do the following:

- *Creating Bulk Users*

11.4.1 Creating Bulk Users

To create bulk users:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Bulk Operations**, and then click **Bulk User Creation**.



Figure 219 Bulk User Creation menu

3. Bulk Users Creation screen appears.

Enter the parameters as given in the table to create the users. The users created here are displayed in *User Management>>Users*.

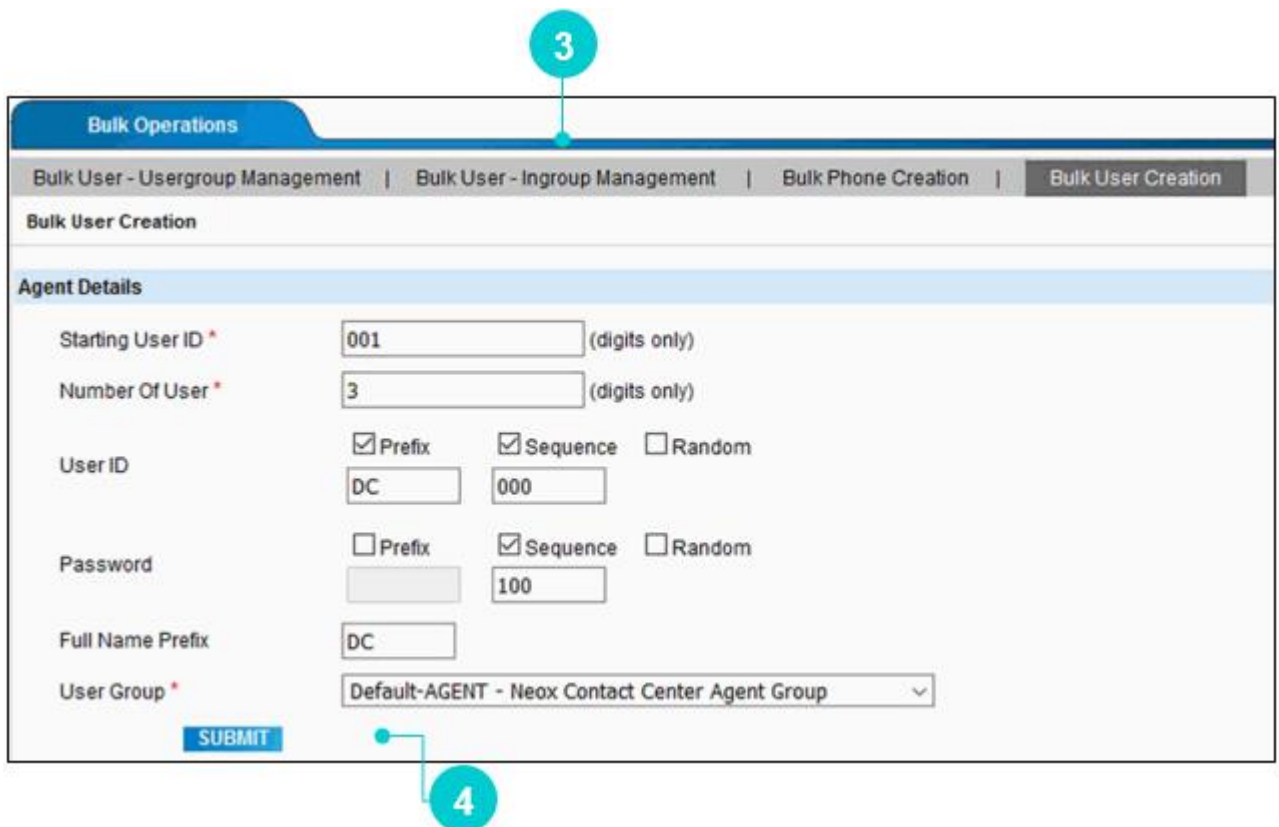



Figure 220 Bulk Phone Creation

Table 63 Bulk Phone Creation parameters

Parameters	Description
Starting User ID *	<p>Enter at least three-digit user id. System increments this user id by 1, to create bulk users.</p> <p>For example, if you enter 100 and Number of User is 3, then three users are created, such as 100, 101, and 102 respectively. The phone number can be accessed from <i>Phones</i>.</p>
Number Of User *	<p>Enter the number of users to create.</p> <p>For example, if you enter 3 and Starting Phone Number is 100, then total three phone numbers are created, such as 100, 101, 102</p>
User ID	<p>Define how you want to create the user id of the user. Select this option and enter at least three digits. The options are:</p> <ul style="list-style-type: none"> • Prefix – Add prefix to the username of the phone number. For example, if Prefix is DC and Phone number is 100, then the username of the phone number is DC100. • Sequence – Increments the username of the phone number by 1. Enter at least three digits to create the username. For example, if Sequence is 100, then username will be 100, 101 and so on. • Random – Sets the username randomly. <p>The username created here is used by the agent to log in on Agent's portal.</p> <hr/> <p> Note You can select either Prefix and Sequence or Random at a time.</p>
Password	Define the login password of the user. The password created here is used by the agent to log in on Agent's portal.
Full Name Prefix	Enter the prefix to add to the user's name
User Group*	Select a user group to associate this user with the user group.

4. Once done, click **Submit**.

5. The users are created in *User Management>>User* and are displayed as following:

<input type="checkbox"/>	USER ID	FULL NAME	GROUP
<input type="checkbox"/>	DC102	DC3	Default-ADMIN
<input type="checkbox"/>	DC101	DC2	Default-ADMIN
<input type="checkbox"/>	DC100	DC001	Default-ADMIN

Figure 221 Bulk Users

6. Based on the user configuration, agent is able to log in to the portal.

- Here, Phone Login and Phone Password is created from *Phones* or *Bulk Operations>>Bulk Phone Creation*.
- User Login and User Password is created from *User Management>>User*.

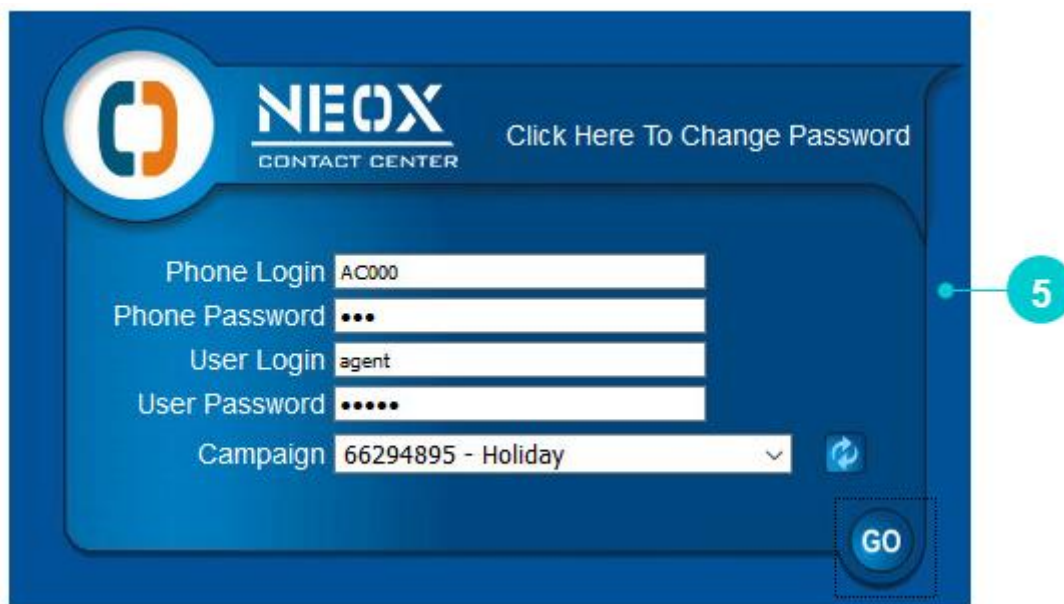
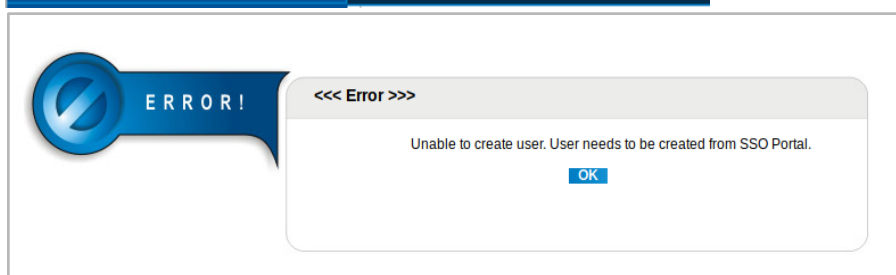


Figure 222 Agent Log in Screen

Note

With SSO enabled, you cannot create Bulk Users. Clicking this option displays the following error message.

Bulk Operations	▶ User - Usergroup Management
Phones	User - Ingroup Management
System Management	▶ Bulk Phone Creation
Logout	Bulk User Creation



12. Phones

This chapter provides information about the Phone Numbers creation process. You can create either a single phone number or bulk phone numbers based on your requirements. If you want to create bulk phone numbers, then you can use the Bulk Phone Number Creation process. Using these phone number configurations, an agent can log in to their portal. Anytime, you can deactivate the phone number that is not required by anyone.

To manage Phone Numbers, do the following:

- *Creating Phone Numbers*
- *Updating, Searching, and Deleting Phone Numbers*
- *Downloading CSV*

12.1 Creating Phone Numbers

This section provides information about creating Phone Numbers.

There are two ways of creating Phone Numbers:

1. Single Phone Number Creation - Provides a way to create a single Phone Number.
2. Bulk Phone Numbers Creation - Provides a way to create multiple Phone Numbers.

The steps involved in creating Phone Numbers are mentioned below:

- *Creating Single Phone Number*
- *Creating Bulk Phone Numbers*

12.1.1 Creating Single Phone Number

To create single phone number:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **Phones**.



Figure 223 Phones menu

3. Phones screen appears.
4. The screen is bifurcated into two sections; Search for Phone and Phone Listing.
 - Search for Phones - Provides a way to search Phone Number details using search criteria.
 - Phone Listing - Provides a list view of existing Phone Number created in the system, including the details such as Extension number and Activating/Deactivating phone numbers. Additionally, you can create, update, search, and delete Phone Numbers and download CSV file containing all phone numbers. Also, you can view details of the phone number by clicking its Extension number.

5. To create a new Phone Number, click **Create**.

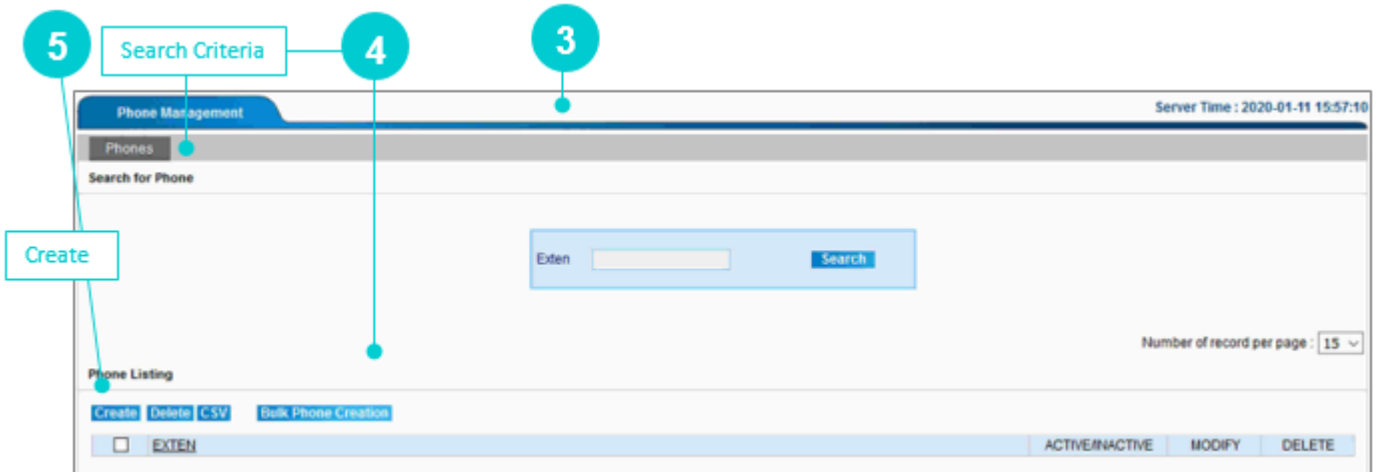


Figure 224 Create Single Phone Number

6. Add a New Phone Number screen appears.

To create a new Phone Number, enter the parameters as given in the table.

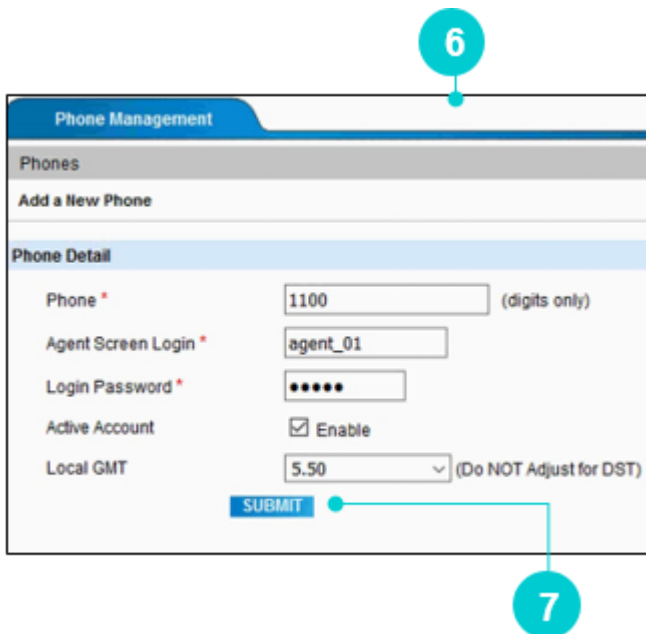


Figure 225 Create Single Phone Number

Table 64 Create Single Phone Number parameters

Parameters	Description
Phone	Enter the extension number.
Agent Screen Login*	Enter the username for the agent, using which the agent login to the portal.

Parameters	Description
Login Password*	Enter the password, using which the agent login to the portal
Active Account	Activate this phone number to allow login.
Local GMT	Select the time zone.

7. Once done, click **Submit**.

12.1.2 Creating Bulk Phone Numbers

To create single phone number:

1. Log in to Neox DC.
2. In the Navigation Area, click Phones.
3. Phones screen appears.
4. Click **Bulk Phone Creation**. To know about the bulk phone number creation process, refer to *Bulk Operations*>>*Bulk Phone Creation*.

12.2 Updating, Searching, and Deleting Phone Numbers

12.2.1 Updating Phone Numbers

To update:

1. Click **Edit** corresponding to the Phone Number on Phone Listing.
2. Modify a Phone Record screen appears.
3. Modify details as required.
4. Once done, click **Submit**.

12.2.2 Searching User Profile Binding

To search using filter:

1. Enter extension number.
2. Click **Search**.
3. System returns Phone Numbers details that contain the search term.
4. To get a list of all Phone Numbers, click **Search**.

12.2.3 Deleting Phone Numbers

Neox provides two ways of deleting the Phone Numbers:

- Single Phone Number deletion – Enables deleting a single Phone Number.
 1. Select a Phone Number.
 2. Click **Delete**.
 3. Click **Ok** to confirm.
- Multiple Phone Numbers deletion - Enables deleting multiple Phone Numbers.
 1. To delete multiple Phone Numbers, select the Phone Numbers OR to delete all Phone Numbers, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

12.3 Downloading CSV

To download CSV:

1. Click **CSV**.
2. Save file for future use.

The file contains page-wise data as displayed on the screen.

13. System Management

This chapter provides information about Dial Center System Management that allows centralized management of Server to configure Neox IP-PBX IP, Third-Party Authentication, Backup, Customized GUI, and Password. This helps in improving the performance of the system.

Contents:

- *Servers*
- *Third-Party Authentication*
- *Backup Management*
- *Customized GUI*
- *Change Password*

13.1 Server Management

This section provides details about Server Management that allows you to perform Neox IP-PBX Server IP and System Configuration. You will be able to perform configuration over the system at a global level. Server Management helps in managing server and performing configuration addressing the requirements.

To manage Server:

1. Log in to Neox DC.
2. In the **Navigation Area**, click **System Management**, and then click **Server Management**.

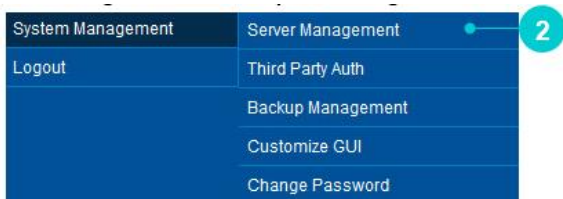


Figure 226 Server Management menu

3. Modify a Server Record screen appears. Enter the parameters as given in the table.

 A screenshot of a web form titled 'Modify a Server Record'. The form is divided into several sections:

- Server Configuration:** Includes fields for 'Neox Server IP' (10.121.21.229), 'Neox Server Port' (8038), 'Local GMT' (5:50), and 'Server Logs' (Y).
- System Configuration:** Includes a 'Redirect Prompt File' (Choose File), 'Redirect Repeat Count' (1), 'Agent View Log History' (0), 'Timeclock End Of Day' (00:00), and several 'Enable' checkboxes for various features like 'View and Update all CDR', 'View and Update Improperly Disposed CDR', 'View and Update Auto Disposed CDR', 'Predictive Dialing', 'SMS Preprocessing', 'EMAIL Preprocessing', and 'CRM Notify Preprocessing'. It also has a 'Neox Recording Resource URL' field and a 'Customer PhoneNumber Hiding' section with radio buttons for 'Super User', 'Agent', and 'Dashboard'.
- Phone number configuration:** Includes 'Minimum Length' (7) and 'Maximum Length' (18).
- Report Management Configuration:** Includes 'Time(second) Slab' (30).

 A blue circle with the number '3' is at the top left, and a blue circle with the number '4' is at the bottom right next to a 'SUBMIT' button.

Figure 227 Server Management

Table 65 Server Management parameters

Parameters	Description
Server Configuration	
Neox Server IP *	Enter the Network IP Address of the server on which the Neox Server is installed.
Neox Server Port *	Enter the JMX Port on which the Neox server is running.
Local GMT	Select the difference in hours from GMT time. This time is not adjusted for Daylight-Savings-Time of the server.
Server Logs	<ul style="list-style-type: none"> • Selecting <i>Y</i> enables logging of all related scripts to their text log files. • Selecting <i>N</i> stops writing logs to files for these processes, also the screen logging of Neox Dial Center is disabled, if this is set to <i>N</i>, when Neox Dial Center is started.
System Configuration	
Redirect Prompt File	Upload a prompt file to play for all campaigns whenever an agent transfers the call or when the customer is waiting for agent allocation after the transfer.
Redirect Repeat Count	Set this option to 1 to play the Redirect Repeat Count. If the field is left blank, then no file is played.
Agent View Log History	Enter the number of recent history that an agent can view. For example, if you enter 5, then agent can view 5 log recent history, or if 0 is entered, then no log history is displayed.
Timeclock End Of Day	Set the time required by the Dial Center to update all its tables internally. You can specify a non-working duration.
View and Update all CDR	Allows updating an existing disposition status of the current day.
View and Update Improperly Disposed CDR	Allows updating an existing improper disposition status of the fail calls for current day.
View and Update Auto Disposed CDR	Allows updating an existing auto disposition status of the current day.
Predictive Dialing	Allows using <i>Predictive</i> as one of the Campaign types and makes calling using the uploaded Lead.
SMS Preprocessing	Allows in enabling SMS setting.

Parameters	Description
EMAIL Preprocessing	Allows in enabling Email setting.
CRM Notify Preprocessing	Allows in enabling CRM Notify setting.
Neox Recording Resource URL	Enter the base path/URL of Neox, so third-party can access the recording.
Customer Phone Number Hiding	Used for hiding customer numbers for Agent, Dashboard, and Admin.
Phone number configuration	
Minimum Length	Enter the minimum length to support for the lead's phone number (applicable for phone number, alternate number 1 and alternate number 2). It should be between 1 and 100. Default minimum length is 7.
Maximum Length	Enter the maximum length to support for the lead's phone number (applicable for phone number, alternate number 1 and alternate number 2). It should be between 1 and 100. Default maximum length is 18.
Report Management Configuration	
Time(second) Slab	Displays information in the given time slabs.

- Once done, click **Submit**.

13.2 Third Party Auth

This section provides details about Third Party Authentication that enables the administrator in creating secret key for authentication purpose, for the third-party application. Using this secret key, CRM application is able to access the features of Neox DC via API.

To manage Secret Key, do the following steps:

- *Creating Secret Key*
- *Updating, Searching, and Deleting Secret Keys*

13.2.1 Creating Secret Key

To create Secret Key:

1. Log in to Neox DC.
2. In the Navigation Area, click System Management, and then click Third Party Auth.



Figure 228 Third Party Auth menu

3. Third Party Auth screen appears.
4. The screen is bifurcated into two sections; Add Secret Key Configuration and Secret Key Listing.
 - Add Secret Key Configuration - Provides a way to create Secret Key Configuration details.
 - Secret Key Listing - Provides a list view of existing Secret Keys created in the system, including the details such as CRM Name, Secret Name, View IP Address, and View API. Additionally, you can modify and delete Secret Key. Also, you can view details of Secret Key by clicking its CRM Name.
5. To create a new Secret Key, click **Add New**.



Figure 229 Third Party Auth

6. Add a Secret Key Configuration screen appears.
Enter the parameters as given in the table.

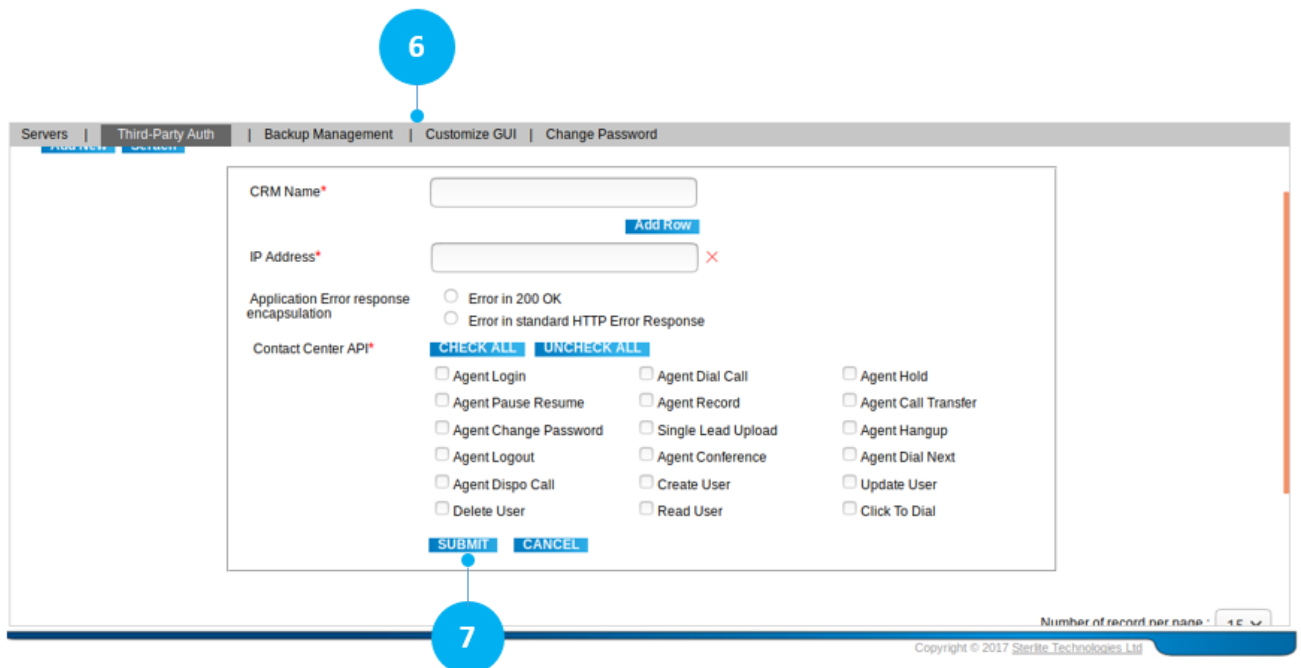


Figure 230 Create Secret Key

Table 66 Create Secret Key parameters

Parameters	Description
CRM Name	Enter the CRM Name to establish the connection.
IP Address*	Enter the IP Address of the CRM from where the request is received for accessing the API.
Application Error Response Encapsulation	There are two types of error response formats – Error in 200 OK and Error in standard HTTP Error Response . Click the corresponding button to select the required format.
Contact Center API*	Select the APIs to allow their access to the third-party CRM.

7. Once done, click **Submit**.

8. Post submitting the details, Secret Key is created. CRM application uses this secret key to access Neox DC application.

Number of record per page : 15

Secret Key Listing

Delete

<input type="checkbox"/>	CRM NAME	SECRET KEY	VIEW IP Address	VIEW API	MODIFY	DELETE
<input type="checkbox"/>	click2dial	VZ8e... dw	10.1...	view		

1

agent_login,agent_dial_call,agent_hold,agent_pause_resume,agent_record,agent_call_transfe
r,agent_change_pass,single_lead_upload,agen
t_hangup,agent_logout,agent_conference,age
nt_dial_next,agent_dispo_call,create_user,upd
ate_user,delete_user,read_user,click_to_dial

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Figure 231 Secret Key Listing

13.2.2 Updating, Searching, and Deleting Secret Key Configuration

13.2.2.1 Updating Secret Key Configuration

To update:

1. Click **Edit** corresponding to the Third Party Auth.
2. Modify a Secret Key Configuration screen appears.
3. Modify details as required.
4. Click **Submit**.

CRM Name: Click2Dial

Add Row

IP Address*: 10.XXX.XX.XXX

Application Error response encapsulation:

- Error in 200 OK
- Error in standard HTTP Error Response

Contact Center API*

- Agent Login
- Agent Pause Resume
- Agent Change Password
- Agent Logout
- Agent Dispo Call
- Delete User
- Agent Dial Call
- Agent Record
- Single Lead Upload
- Agent Conference
- Create User
- Read User
- Agent Hold
- Agent Call Transfer
- Agent Hangup
- Agent Dial Next
- Update User
- Click To Dial

Figure 232 Secret Key Configuration

13.2.2.2 Searching Secret Key Configuration

To search using filter:

1. Click Search.
2. Enter CRM Name/IP Address or select Contact Center API.
3. Click **Search**.
4. System returns Secret Key Configurations that contain the search term.
5. To get a list of all Secret Key Configurations, click **Search**.

13.2.2.3 Deleting Secret Key Configurations

Neox provides two ways of deleting the Secret Key Configurations:

- Single Secret Key Configuration deletion – Enables deleting a single Secret Key Configuration.
 1. Select a Secret Key Configuration.
 2. Click **Delete**.
 3. Click **Ok** to confirm.

- Multiple Secret Key Configurations deletion - Enables deleting multiple Secret Key Configurations.
 1. To delete multiple Secret Key Configurations, select the Secret Key Configurations OR to delete all Secret Key Configurations, select the header column.
 2. Click Delete.
 3. Click **Ok** to confirm.

13.3 Backup Management

Note

This module is deprecated. Currently, Backup and restore are managed via manual process.

This section provides information about Backup Management that allows the administrator to take a backup of their system configuration and logs when required. Taking backup is recommended in case of any upgrade or emergency. The process of backing up, refers to the copying and archiving of the Neox Configuration so it may be used to restore the original after a data loss event. The primary purpose is to recover data after loss, be it by data deletion or corruption. On backup, the backup file is generated which can be downloaded on the system and saved for future use.

To configure backup, do the following step:

- *Configuring Backup*

13.3.1 Configuring Backup

To customize the GUI:

1. Log in to Neox DC.
2. In the Navigation Area, click System Management, and then click Backup Management.



Figure 233 Backup Management menu

3. Backup Management screen appears.
4. Enter the Backup Name to give to the back up file and mention any comment, if required.
5. You can take backup of configuration and log file, based on your selection.
6. Once done, click **Submit**.
7. Backup process gets started. Wait till the process is completed. After backup is completed, the file appears in the Backup List.
8. You can download and save the file by clicking **Download** or delete by clicking **Delete**.

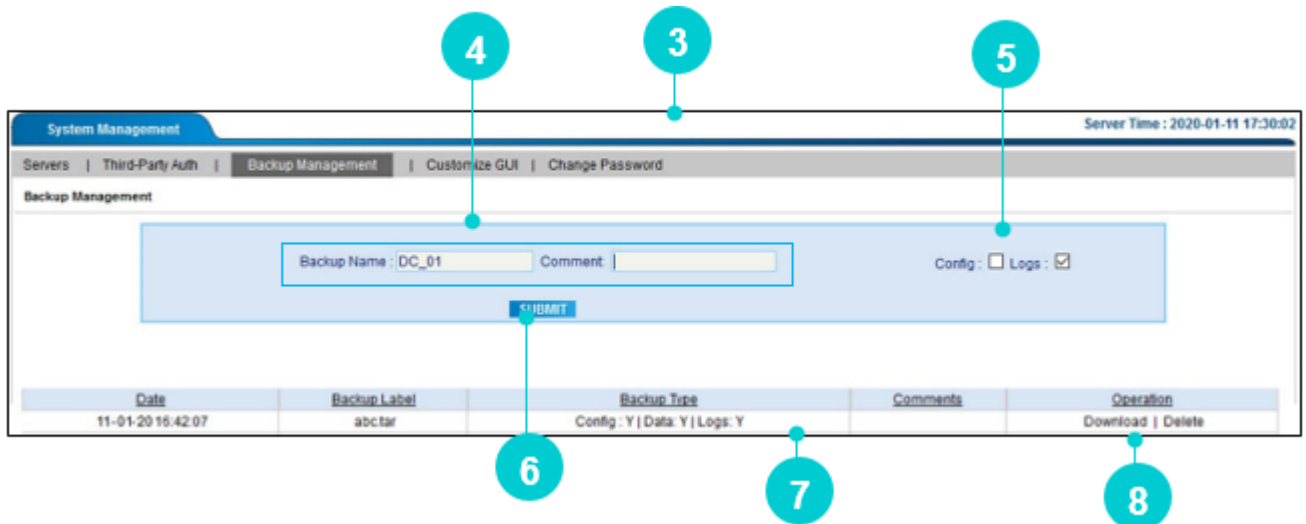


Figure 234 Backup Management

13.4 Customized GUI

This section provides details about Customized GUI Neox Dial Centre that allows you to customize Neox DC Login screen and Agent's Login screen.

To customize the GUI, do the following:

- *Customizing GUI*

13.4.1 Customizing GUI

To customize the GUI:

1. Log in to Neox DC.
2. In the Navigation Area, click System Management, and then click Customize GUI.



Figure 235 Customize GUI menu

3. Customize GUI screen appears.
4. Enter the text that you wish to display on the Neox DC Log in Screen and Agent's Login screen. You can modify the text using the various formatting tools available.
5. Once done, click **Submit**.

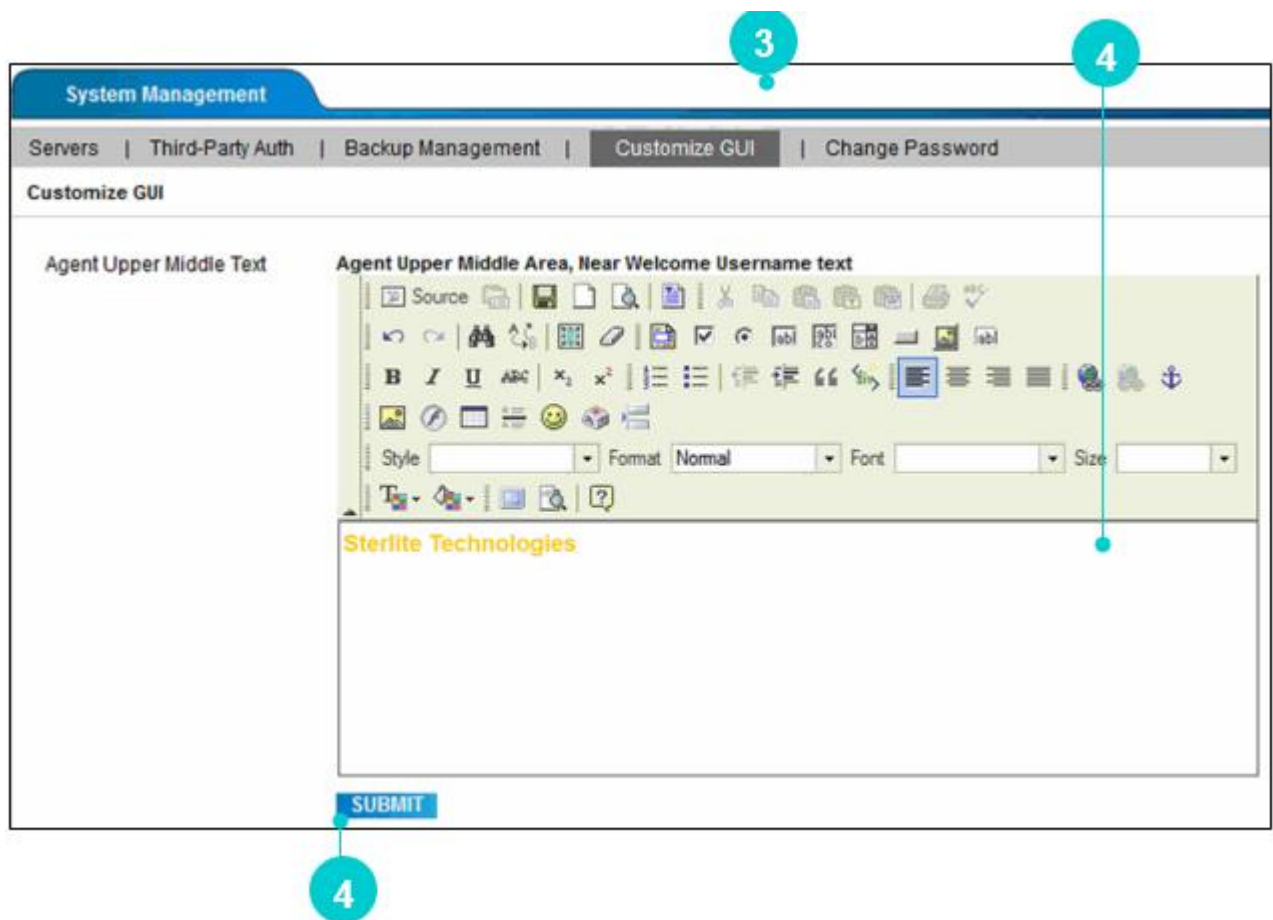


Figure 236 Customize GUI

6. Neox Dial Center Login screen looks like following:

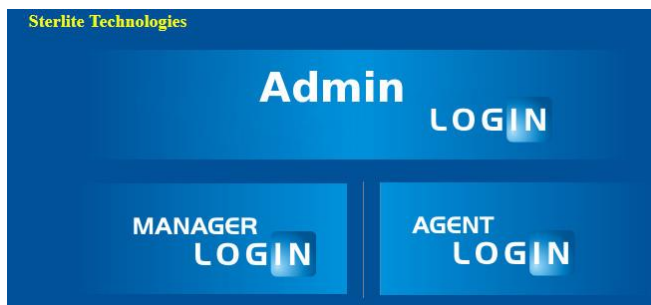


Figure 237 Neox DC Login screen

7. Agent Login screen looks like following:



Figure 238 Agent Login screen

13.5 Change Password

This section provides steps to change the password of Neox DC. Change Password feature facilitates in updating the password of the administrators'/managers' account. Password defined by the administrator is stored in the database. However, old password can be changed as and when required.

To change password, do the following:

- *Changing Profile Password*

13.5.1 Changing Profile Password

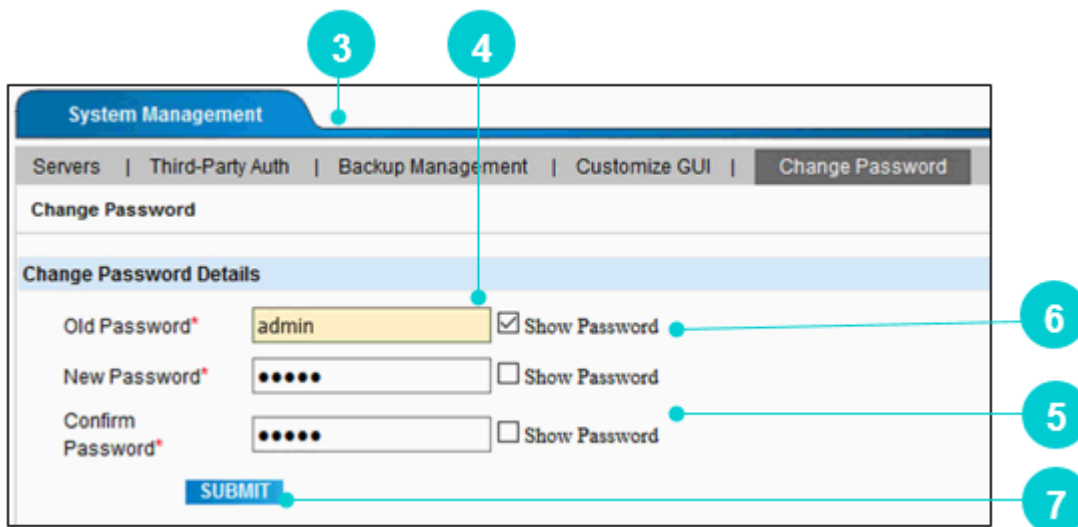
To change the password:

1. Log in to Neox DC.
2. In the Navigation Area, click System Management, and then click Change Password.



Figure 239 Change Password menu

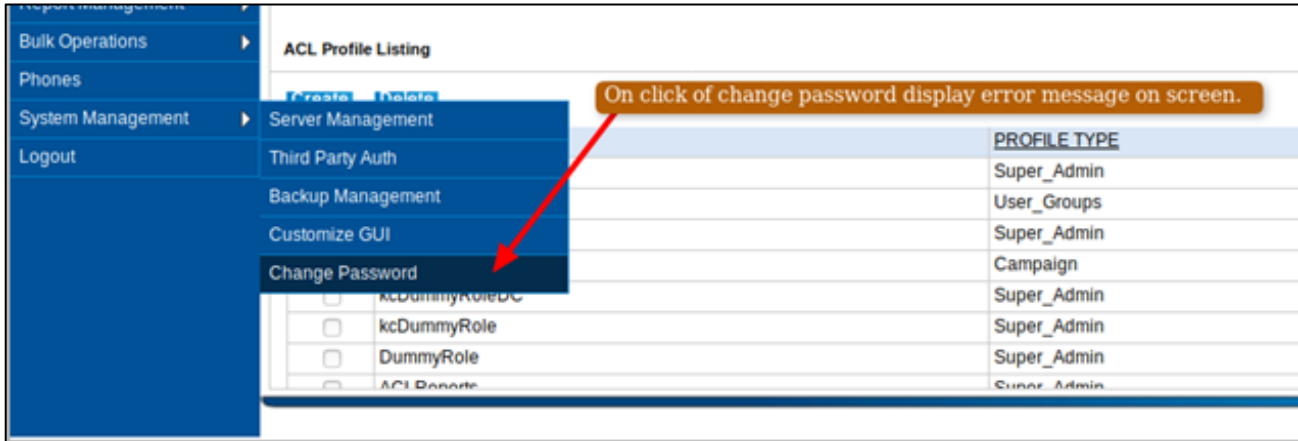
3. Change Password screen appears.
4. In the Change Password Details section, enter the Old Password that you want to change.

A screenshot of the 'Change Password' web interface. At the top, there is a 'System Management' tab and a breadcrumb trail: Servers | Third-Party Auth | Backup Management | Customize GUI | Change Password. Below this is a 'Change Password Details' section with three input fields: 'Old Password*' containing 'admin', 'New Password*' with masked characters, and 'Confirm Password*' with masked characters. Each field has a 'Show Password' checkbox. A blue 'SUBMIT' button is at the bottom. Red callout circles with numbers 3, 4, 5, 6, and 7 point to the 'System Management' tab, the 'Old Password' field, the 'Show Password' checkboxes, and the 'SUBMIT' button respectively.

5. Enter a "New Password" and confirm the same in "Confirm Password" field.
6. You may also select Show Password to view the entered password.
7. Click **Submit** to change the password.

 **Note**

With SSO enabled, you cannot change the **profile password**. Clicking this option displays the following error message.



14. Dashboard

This chapter provides information about Dashboard that displays a graphical presentation of the live status of the Calls, Agents, Campaigns, Ingroup, and KPI. Having known the current status of the calls, you will be able to address any challenges faced by your contact center.

Neox Dial Center, provides an easy to read, single page, real-time user interface, showing a graphical presentation of the current status, to enable instantaneous and informed decisions to be made by the administrator at a glance. Dashboard displays Total System Call Status – agents talking and calls in queue, Outbound Call Status, Inbound Call Status, Agent summary like No of Agents logged in, in the system, No of Agents in Calls, No of Agents waiting, No of Agents in pause mode, Agents in disposition state and so on.

You will be able to view the following live details in the dashboard:

1. Live Calls
2. Live Agents
3. Campaign Details
4. Ingroup Details
5. KPI Details
6. Auto-Move
7. Change Skin
8. Refresh Rate

All these tabs have their individual page. So it becomes easy for the administrator to monitor the activities going on even though there are large number of campaigns, in-groups and agents.

Contents:

- Accessing Dashboard

14.1 Accessing Dashboard

To access Dashboard

1. Log in to Neox DC.
2. In the **Other Options**, click **Dashboard** in the top-right corner of the screen.



Figure 240 Dashboard options

3. Dashboard screen appears.
4. By default, the dashboard is set to Auto-Move (sixth menu from left), which means you will get a view of all menus one by one automatically.
5. The default value of the refresh rate is set to 30 seconds. To change the refresh rate, type the value in the refresh Rate field and click on **Go**.

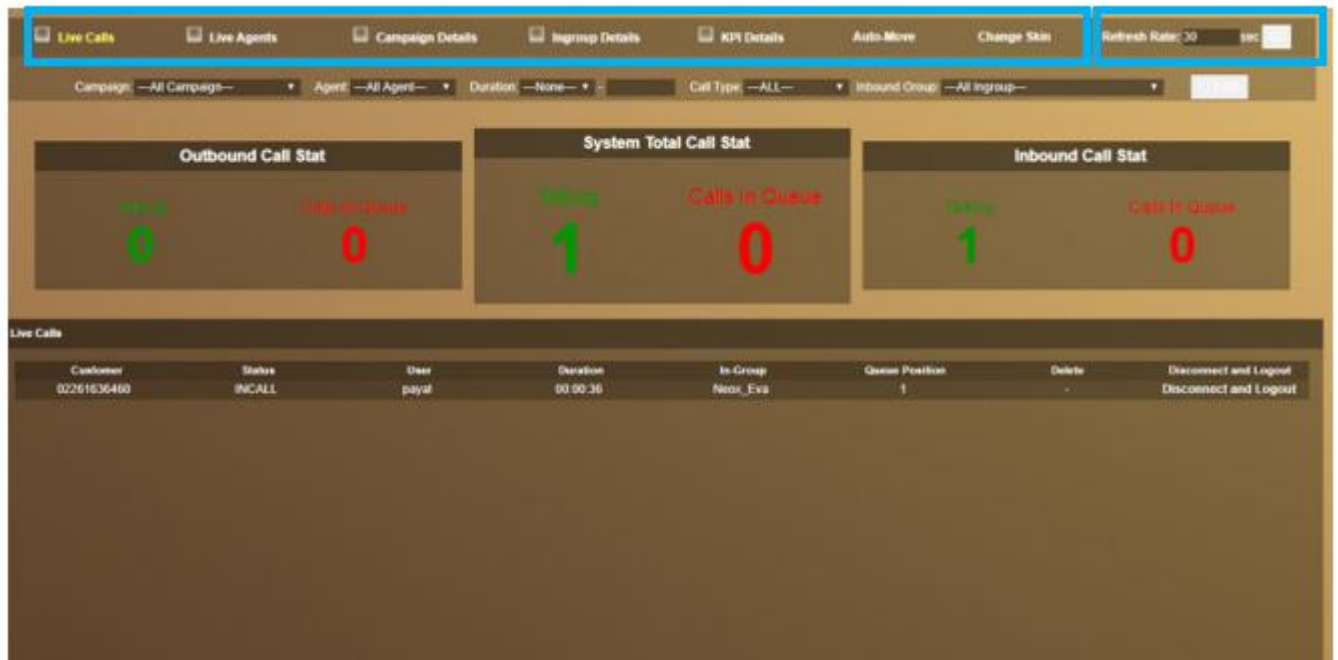


Figure 241 Dashboard

14.1.1 Live Calls

Live Calls displays a list of all Live Calls.

1. Click **Live Calls** to get a list of all Live Calls.

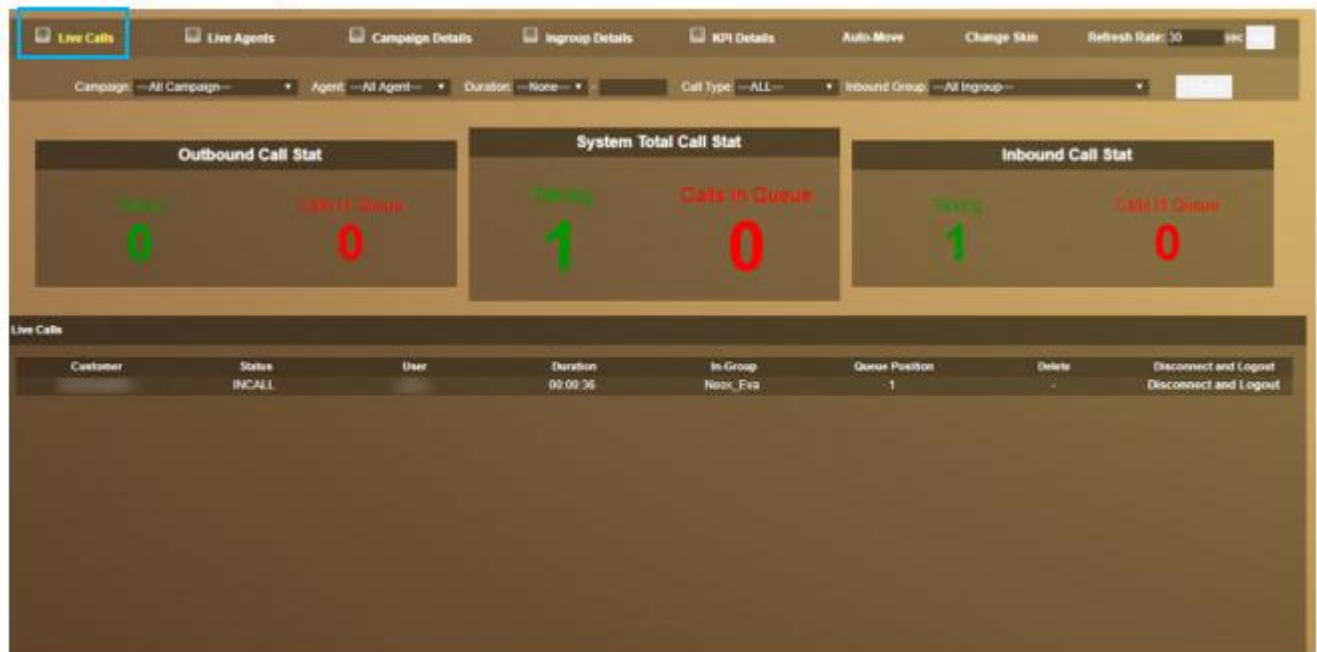


Figure 242 Live Calls

Live Call displays the following details:

1. Outbound Call Stat - The number of live calls made by the agents to the customers, which are in talking mode are displayed in green. The number of live calls made by the agents to the customers which are in queue (getting connected, customer busy, and so on) are displayed in red.
2. System Total Call Stat - The total number of live calls (Inbound + Outbound), which are in talking mode are displayed in green. The total number of live calls (Inbound + Outbound), which are in queue (getting connected, customer busy, and so on) are displayed in red.
3. Inbound Call Stat - The number of live calls made by the customers to the agents, which are in talking mode are displayed in green. The number of live calls made by the customers to the agents, which are in queue are displayed in red.



Figure 243 Call Status

4. Live Calls section displays a list of all live calls with the details such as, Customer Number, Status of call, Agent name, Duration of User, In Group of agent, Queue Position of any call.
5. You can also disconnect the call and the agent can be logged out from the screen by clicking “Disconnect and Logout”.



Figure 244 Live Calls details

6. The live calls can be filtered on the bases of campaign, agent, duration, call type and ingroup.

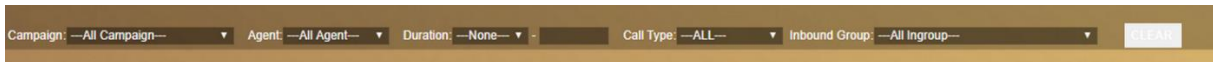


Figure 245 Search Call Status

14.1.2 Live Agents

Live Agents displays a list of Live Agents currently using the system.

1. Click **Live Agents**.



Figure 246 Live Agents

- Agents Logged in - Total number of Agents logged in to Neox Dial Center (Agent in Call + Agent Waiting + Agent Pause) is displayed in blue.
- Agents in Calls - Total number of agents who are in talking state and are displayed in green.
- Agents Waiting - Total number of agents who have logged into Neox Dial Center, but are not talking to anyone come and are displayed in red.
- Agents in Paused - Total number of agents who have paused themselves and are displayed in yellow.
- Agents in Dispos - Total number of agents who are filling the disposition status of the call and are displayed in pink.
- Agents in Lagged – Displays the agent details that are not synched with Neox DC due to the network issue.
- Agents in Dead Calls - Total number of calls that are not connected with agent or customer are displayed here.

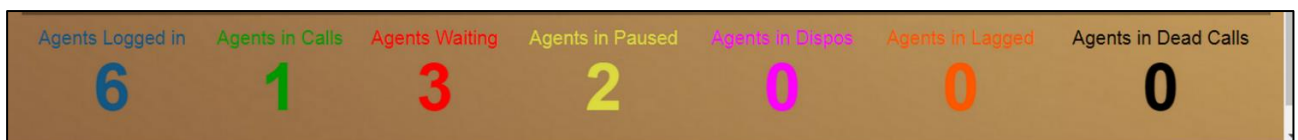


Figure 247 Various Statuses of Agents

14.1.3 Campaign Details

Campaign Details displays the details of campaigns of all agents. The campaign details can be filtered on campaign base. All the campaigns along with agent details in that campaign like agents logged in, agents in call, agents in paused, agents in dispo, agents in waiting, and other campaign details like total number of leads, total number of dialled leads, calls in queue, active calls and total calls are listed here.

Campaign	Total Call	Active Call	Call in Queue	Agents Logged in	Agents in Calls	Agents Waiting	Agents in Paused	Agents in Dead Calls	Agents in Dispos	Total Lead Count	Dial Lead Count
NeoxSupport	33	0	0	6	0	4	2	0	0	4	0

Figure 248 Campaign Details

14.1.4 Ingroup Details

Ingroups Details displays the details of ingroup of all agents. The Ingroup details can be filtered on the bases of Ingroup, agent, duration, and call type. All the Ingroups along with agent details in that Ingroup like agents logged in, agents in call, agents in paused, agents in dispo, agents in waiting, and other Ingroup details calls in queue, active calls and total calls are listed here.



Figure 249 Ingroups

11. Service Level – Following is the formula for Service Level.

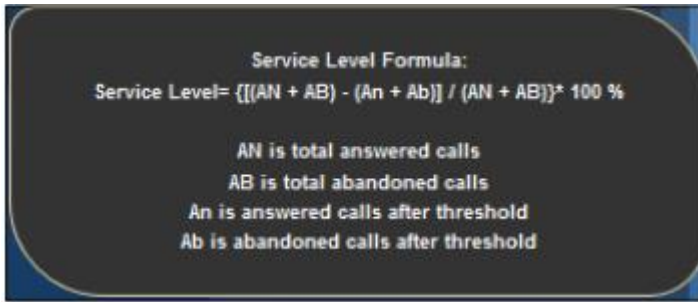


Figure 251 Service Level

Campaign KPI

This tab displays the top three disposition-status used by the agents in the campaign. The most used status is displayed in top status 1, the second most used status is displayed in top status 2 and the third most used status is displayed in top status 3. NOTE: Service level and threshold have no role in campaign KPI details.

Live Calls
Live Agents
Campaign Details
Ingroup Details
KPI Details
Auto-Move
Change Skin
Refresh Rate: 30 sec

Campaign: ---All Campaign---
Agent: ---All Agent---
Duration: ---None---
Call Type: ---ALL---
Inbound Group: ---All Ingroup---
CLEAR

KPI Related Details KPI Details Refresh Rate: 30 Minute

Ingroup KPI
 Campaign KPI
Service Level: 20 sec
Threshold: 80 %

Duration	
<input checked="" type="radio"/> Start Time (HH:MM)	<input type="radio"/> Hours
12 : 17	01

Campaign Specific KPI Details Last 1 Hour Outbound Calls Detail

Campaign	Total Call	Answer Call	Abandoned Call	Talk Avg	Dispo Avg	Top Status 1	Top Status 2	Top Status 3
NeoxSupport	4	3	1	00:05:41	00:00:01	3-ADSC	1-NCALL	-

Figure 252 Campaign KPI

14.1.6 Change Skin

Change Skin allows you to change the skin of the dashboard into any of the given options.

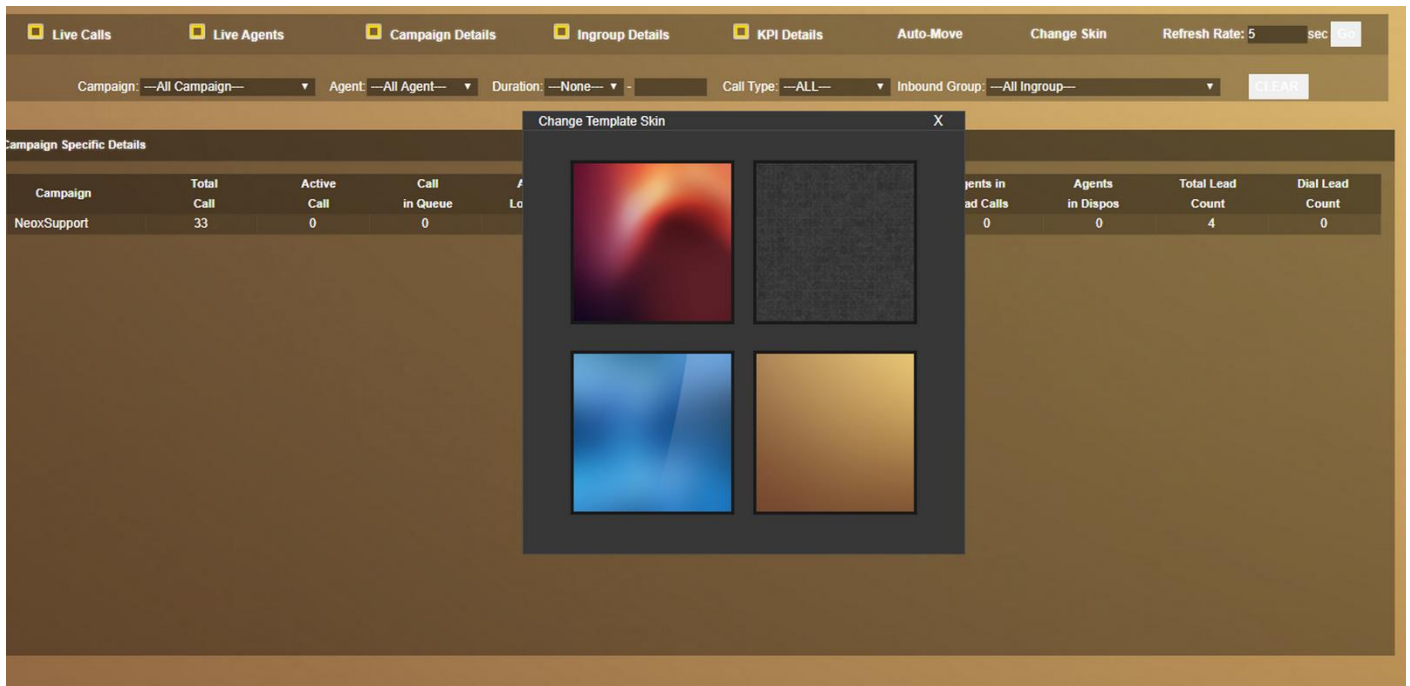


Figure 253 Chance Skin

15. Logout

To log out:

12. In the Navigation Menu, click Logout.



Figure 254 Logout

Or,

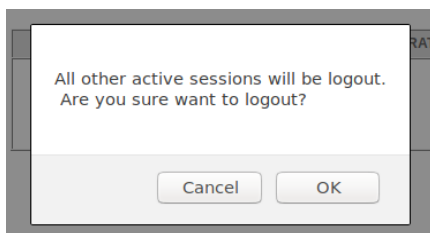
Click **Log out** from the top-right of the screen.



Figure 255 Log out

Note

With SSO enabled, a confirmation message appears. Click **OK** to confirm the logout action. To cancel the logout action, click the **Cancel** tab.



16. Neox DC Login as Manager

This section provides the details about the Manager's log in, in the Neox Dial Center. In Neox DC, three types of user's profile can login. One such is Manager Log in, where Neox DC Manager can log in from the same log in screen, using the credentials provided by the administrator. Manager is able to access only those modules that are delegated by the administrator.

The Manager profile is created by Neox DC Administrator from *ACL Management*.

Based on the status of SSO (Single_Sign_On) via *Keycloak* – enabled or disabled, login steps differ.

Contents:

- *Login to Neox DC as Manager*

16.1.1 SSO is Disabled

Users will be created and authenticated in Neox applications.

16.1.1.1 Log in to Neox DC as Manager

To login to the Neox DC, follow these steps:

Note

Recommended Browsers – Google Chrome 94, Mozilla Firefox 60 and above, and Microsoft Edge 88 and above..

1. Open the browser, type Neox DC URL in the address bar and press **Enter**.

For example,

`https://<IP address>:9090` (where IP address is the address of the Neox DC) .

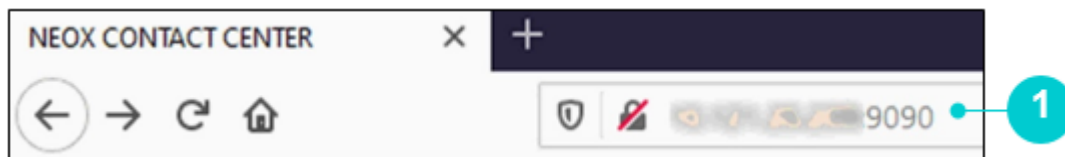


Figure 256 Neox login through browser

2. Neox DC Log in screen appears.
3. Click **Manager Login** to login as Manager.



Figure 257 Manager Login

4. Neox Contact Center login screen appears.
5. Enter a valid username and password.

- Click **Go** to login to the Neox Contact Center to log in to the Manager’s profile.



Figure 258 Neox Contact Center for Manager’s Profile

- Once credentials are validated, then the Neox DC Manager’s Home screen appears. The screen displays only those modules that are delegated to the Manager profile.

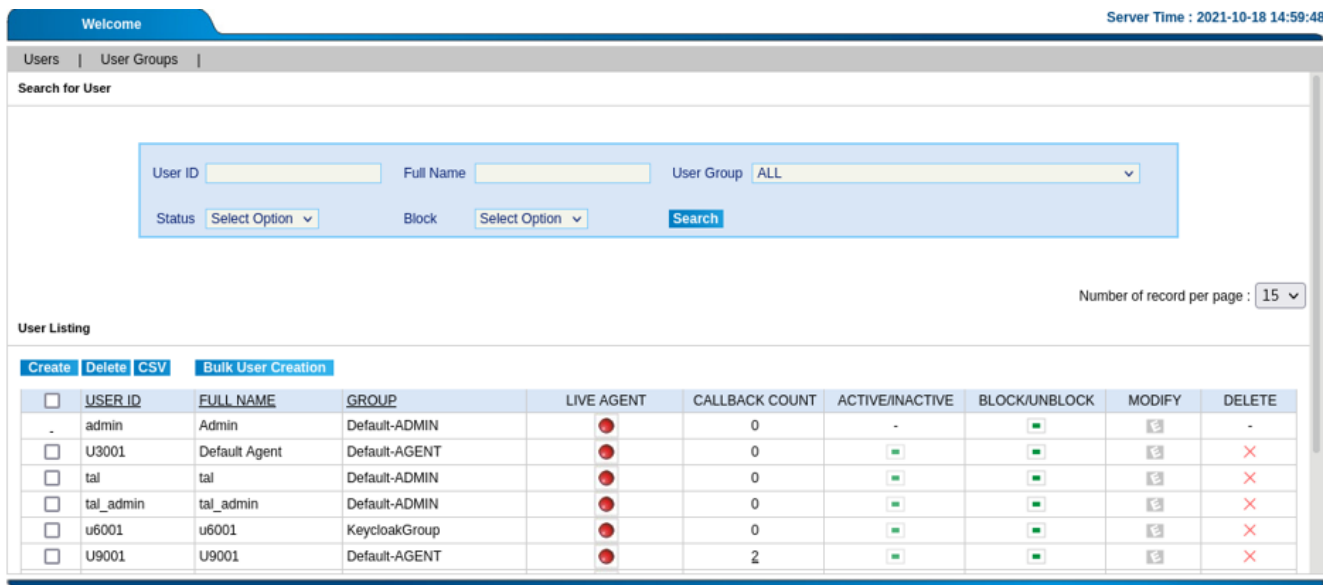


Figure 259 Neox DC Manager’s home

16.1.2 SSO is Enabled

Users will be created and authenticated on the SSO server.

16.1.2.1 Login Flow

With SSO enabled following is the Login/Session Flow:

1. User attempting the logging into the Client Application is redirected to Keycloak's login page (If not already logged in).
2. After logging in to the Keycloak, it redirects to the Client Application with details of client and realm profiles.
3. Client Application checks the following:
 - a. Whether the profile as received from Keycloak for the user matches as configured in the client application or not. If not, disallow login.
 - b. If the user is not available in the database, create one.
 - c. If the user already exists, check the associated profile, first name, and last name. If the user information has changed, update the profile.
4. Provide the Client application's access to the user as per the associated profile.
5. With the Keycloak configuration enabled i.e., *Single-Sign-On => 1*, try to login by clicking on **Admin** or **Manager**. Alternatively, following the URL `http://<<ipaddress/hostname>>:<<port>>/<<application-name>>`

For example, type `http://XX.XX.XX.XXX:9090/admin/admin.php` in the address bar and press the Enter key. The system will redirect to the Keycloak login page.

Note

For https URL use the following link: <https://<<ipaddress/hostname>>:<<port>>/<<application-name>>>

17. Neox DC Login as an Agent

This section provides the details about Agent's log in, in the Neox Dial Center. In Neox DC, Agent can log in from the same log in screen, as that of Administrator and Manager, using the credentials provided by the administrator. Agents can receive calls from the customers, make outgoing calls for promotions and perform other operations, such as hang up a call, pause to take a break, dial leads, and call back the customers and so on.

The Agent profile is created by Neox DC Administrator from *User Management*.

Based on the status of SSO (Single_Sign_On) via *Keycloak* – enabled or disabled, login steps differ.

Contents:

- *Login to Neox DC as an Agent*
- *Navigating through Neox DC as an Agent*

17.1.1 SSO is Disabled

Users will be created and authenticated in Neox applications.

17.1.1.1 Log in to Neox DC as an Agent

To login to the Neox DC, follow these steps:

Note

Recommended Browsers – Google Chrome 94, Mozilla Firefox 60 and above, and Microsoft Edge 88 and above.

1. Open the browser, type Neox DC URL in the address bar and press **Enter**.

For example,

`https://<IP address>:9090` (where IP address is the address of the Neox DC).

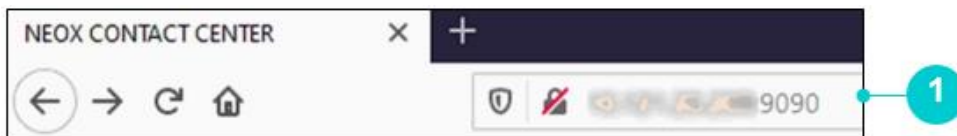


Figure 260 Neox login through browser

2. Neox DC Log in screen appears.
3. Click **Agent Login** to login as Agent.



Figure 261 Agent Login

4. Neox Contact Center login screen appears.
5. Enter the valid Phone Login and Password.

 **Note**

- The Phone Login and Password are configured from *Neox DC Admin Profile>>Navigation Area>>Phones*.
- User Login and User Password are configured from *Neox DC Admin Profile>>User Management>>Users*.
- It is mandatory that hardphone or softphone should be registered in Neox. Make sure to enter the correct phone number of the extension in Agent's screen during login that is registered in Neox DC. If a phone is not registered in Neox DC, then you will not be able to log in, in Agent's screen.

6. Click **Go** to login to the Neox Contact Center.



Figure 262 Neox Contact Center

7. Once credentials are validated, then the Neox DC Agent's Home screen appears. On this home screen, you can view the agent name with the average rank for the current day given by the administrator. This average rank helps in determining the customer experience from the call.
8. By default, agent logs in "PAUSED" status. In this status, agent can make outgoing calls, however, cannot receive incoming calls.

- You need to change the status from PAUSED to RESUME, to start receiving incoming calls. However, you cannot make outgoing calls in RESUME status.

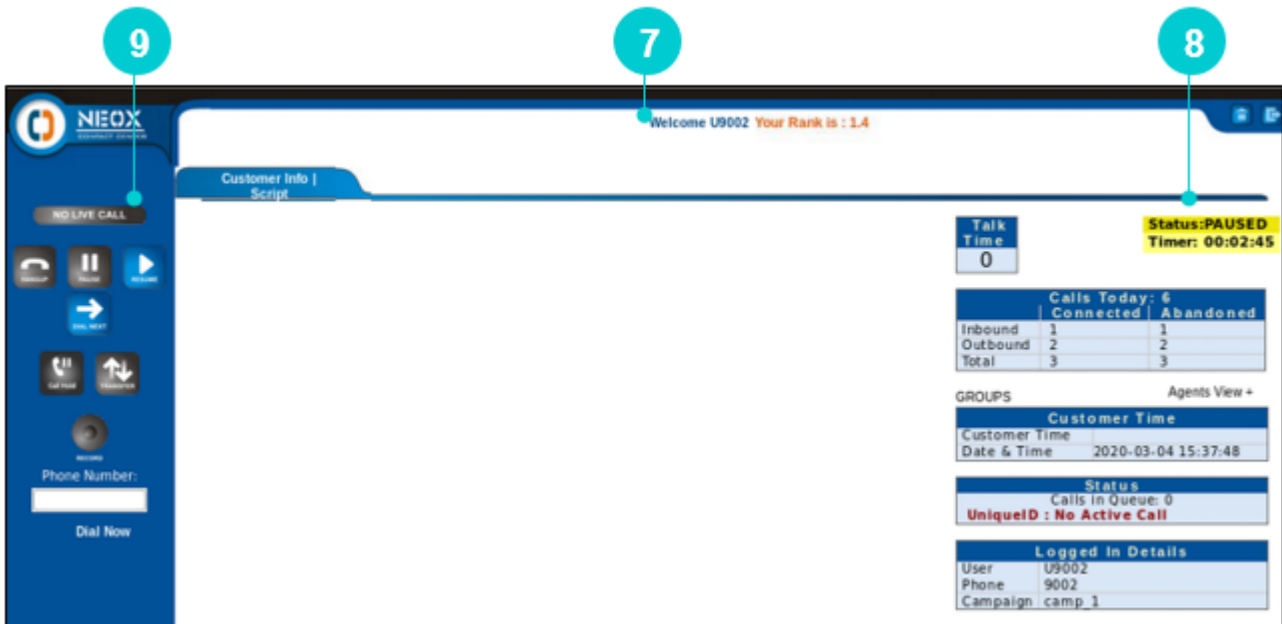


Figure 263 Neox DC Home

- Agent’s availability status is changed to Ready. Now, an incoming call can be received by the agent.

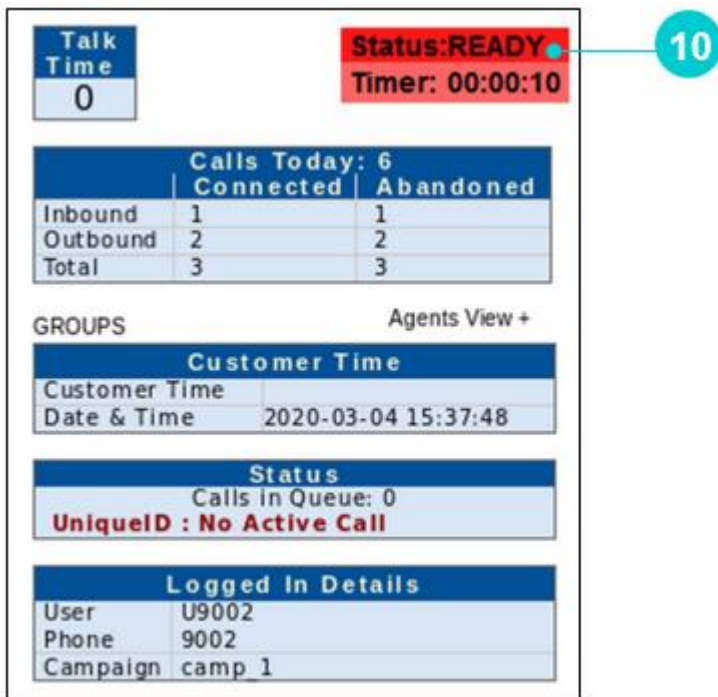


Figure 264 Agent’s Ready status

17.1.2 SSO is Enabled

Users will be created and authenticated on the SSO server.

17.1.2.1 Login Flow

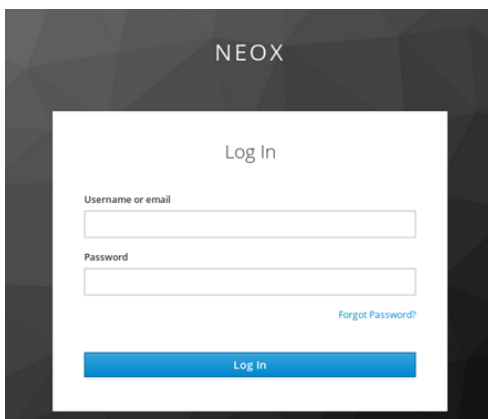
With SSO enabled following is the Login/Session Flow:

1. User attempting the logging into the Client Application is redirected to Keycloak's login page (If not already logged in).
2. After logging in to the Keycloak, it redirects to the Client Application with details of client and realm profiles.
3. Client Application checks the following:
 - a. Whether the profile as received from Keycloak for the user matches as configured in the client application or not. If not, disallow login.
 - b. If the user is not available in the database, create one.
 - c. If the user is already existing, check the associated profile, first name, and last name. If the user information has changed, update the profile.
4. Provide the Client application's access to the user as per the associated profile.
5. With the Keycloak configuration enabled i.e., *Single-Sign-On => 1*, try to login by clicking on **Agent**. Alternatively, following the URL `http://<<ipaddress/hostname>>:<<port>>/<<application-name>>`
For example, type `http://XX.XX.XX.XXX:9090/agent/ecdial.php` in the address bar and press the Enter key. The system will redirect to the Keycloak login page.

Note

For https URL use the following link: <https://<<ipaddress/hostname>>:<<port>>/<<application-name>>>

6. Enter the **Username** and **Password** created in the Keycloak. Click **Log In**.



Keycloak authenticates the username and password. After a successful login, the user lands on the DC agent page.

- a. If user login is successful, then system checks in the application database, i.e. `ecdial_users`.

- b. If the user is not found in the application database, then its information is added in the application database.
- c. If the user is already available in the application but its information (e.g. full name or profile) does not match, then it is updated by the system in the application database.

 **Note**

Here, the Password is same as the Username as Keycloak does not provide the *password* in the user information.

7. After successful authentication, the system redirects user to the Agent's detail page.



The screenshot shows a login interface for 'NEOX CONTACT CENTER'. It features a blue background with a white header area containing the logo and the text 'NEOX CONTACT CENTER'. Below the header, there are three input fields: 'Phone Login', 'Phone Password', and 'Campaign' (a dropdown menu). A 'GO' button is positioned at the bottom right of the form. In the top right corner, there is a link that says 'Click Here To Logout'.

- Fill in details –Phone Login, Phone Password, and Campaign.
- Click **Go**.

If the details are valid, then the system redirects user to the Agent home page.

17.2 Navigating through Neox DC as Agent

The Home Screen of Agent portal allows the agents to manage calls from a centralized platform. The screen is divided into the following sections: Call Features, Work Area, and Customer and Agent details.

1. Call Features - Displays calling features that allows the agent to handle the calls, such as hanging up call, pausing call, resuming call, dialing next call, placing call on hold, transferring call, conference, recording call, and dialing phone number.

Following calling features are available in Agent portal:

- Hangup
- Pause (Pause Code)
- Resume
- Dial Next
- Call Hold/Unhold
- Transfer
- Dialing Phone Number
- Conference Call
- Callback

2. Work Area - Work Area provides customer information. All configurations are performed in this area, such as lead search, call parking, update disposition, call graph and so on. Agent can also access predefined script from this area.

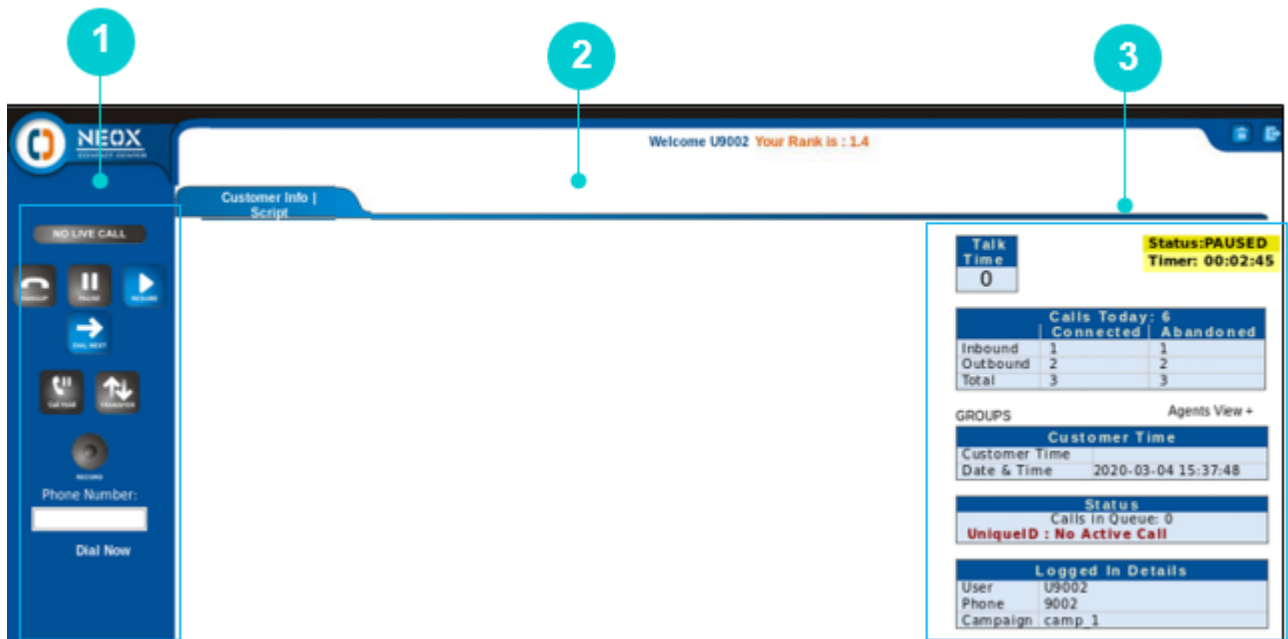


Figure 265 Neox DC Navigation Area, Work Area and Menu Options

3. Customer and Agent details – Provides the details of Talk Time, Inbound and Outbound Calls, Customer such as Customer Date and Time, Agent login and other details.

17.2.1 Call Features

The call features enable the agent to make outgoing calls and receive incoming calls from the customers. The outgoing calls take place based on the types of Campaign selected for the particular user group. The configuration of the Campaign Type is done at *Administrator >> Campaign Management >> Campaign*.

Use Case

To make an outgoing call.

Pre requisite

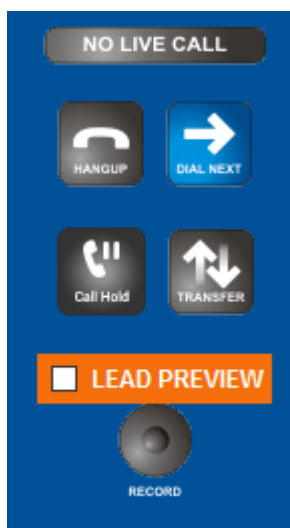
1. Create a Campaign, let's say "NMNAUL" with a Campaign Type "MANUAL" from *Administrator >> Campaign Management >> Campaign*.
2. Create a List, let's say 7001 and attach Campaign Type. In this case, attach "MANUAL" Campaign Type with List Id "7001" from *Administrator >> List Management >> List*.
3. Upload leads to the List "7001" from *Administrator >> List Management >> Load New Leads*.
4. Create a User Group "NUGM" and allow the Campaign "NMNAU". If you want to allow the agent to receive incoming calls, then select Inbound Groups.
5. Create a User "NUM1" and attach it with the User Group "NUGM".

Steps to make outgoing calls:

Now, agent is required to login using the phone id and password, username and password and select the campaign as selected in Pre requisite to make outgoing calls.

The outgoing calls can be from any of the following Campaign Types:

- MANUAL - Auto_dial_level is locked at 0 and the agent has to manually click **Dial Next** to dial next lead uploaded by the admin.
- PREVIEW - User information is displayed to the agent before the call is connected to the customer. Here, agent can dial/skip/delete a call.



- **PROGRESSIVE** - User information is displayed to the agent before the call is connected to the customer. The Agent can choose to either dial the lead, skip or trash the lead. If the agent performs no action, then the system automatically dials the lead.
- **PREDICTIVE** - As soon as the agent logs in and is available in "READY" status, the system starts calling the leads automatically. However, if the agent is in "PAUSE" mode, then the calling goes in Pause Mode.
- **INBOUND_MAN** - Allows the agent to dial calls manually from a campaign list, while being able to take inbound calls between manual dialed calls.
- **VOICE_BLASTER** - All the numbers in the lead are automatically dialed and the IVR is played. Usually, it is used for broadcasting a message. For example, advertisements or marketing.

17.2.1.1 Phone Number

This feature is used to manually dial a phone number. It is applicable for INBOUND_MAN type of Campaign.

Prerequisite

- Modify Campaign from Campaign Management in Neox DC.
- Set Parameter Name - Manual Dial Override to "ALLOW_ALL".

To make a call:

1. Enter the Phone Number in the dial box.
2. Dial **Dial Now**. System starts making the call.

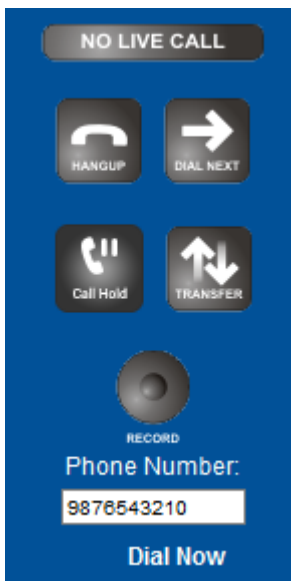


Figure 266 Enter phone number

3. After the call is completed, click **Finish and Disposition Call**, only if disposition is enabled.



Figure 267 Dispose Call

4. Select a disposition type from the given list of options.
5. Click **Submit**.

Disposition Timer: 52

DISPOSITION CALL : 9876543210

CALL DISPOSITION

A - Answering Machine	AC - Accounts
Agent - New Lead Agent	B - Busy
Bus - Bus	CALLBK - Call Back *
Cancel - Cancellation	Car - Car
DC - Disconnected Number	DEC - Declined Sale
DNC - DO NOT CALL	Dom - Domestic
FareQu - Fare Quotation	HOLI - Holidays
Hotel - Hotel	Imagic - Imagica
INTL - International	Issu - Issuance
LB - LUNCH BREAK	N - No Answer
NI - Not Interested	NP - No Pitch No Price
OP - Other Products	Pranam - Pranaam
QueTic - Queue Ticketing	Rail - Railway
Reissu - Reissuance	SALE - Sale Made
SimCa - Sim Card	SSRIn - SSR/Infant
TB - TEA BREAK	Tech - Technical

PAUSE AGENT DIALING

Figure 268 Disposition Types

6. If no option is selected, then the call is automatically disposed from the system, if time based disposition is enabled in *Neox DC Admin Profile Campaign Management>>Campaign>>Call Disposition*. You can select "Pause Agent dialing" with disposition selection if agent wants to PAUSE after this disposition. This is used mainly in Predictive dialing.

17.2.1.2 Dial Next

Agent can initiate a new call through the **Dial Next** option. System starts looking for the next lead and dials the lead. If no lead is available, then an alert message appears.

To auto dial the next lead:

1. Click **Dial Next**.

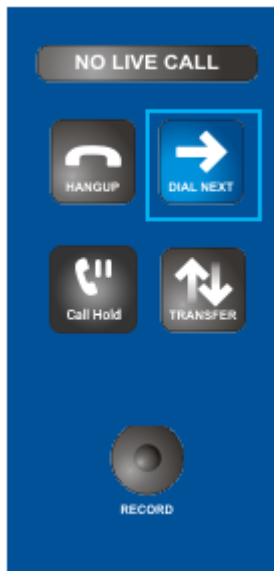


Figure 269 Dial Next

2. System starts calling the phone numbers (leads) available in the lists.

17.2.1.3 Hangup

To hang up the call:

1. Click **Hangup**.
2. Disposition Timer (If configured) is displayed. Dispose the call in the given time period or system automatically disposes the call.
3. Click **Finish and Disposition Call**.



Figure 270 Hangup Call

4. Disposition Call Statuses appears.

5. Select a status and click **Submit**.

The screenshot shows a web interface for call disposition. At the top, it displays "Disposition Timer: 47". Below this, it shows "DISPOSITION CALL : 12345" and "CALL DISPOSITION". A large table lists various disposition codes in two columns. A red circle with the number "4" points to the table. At the bottom, there are three buttons: "PAUSE AGENT DIALING" (with a checkbox), "CLEAR FORM", and "SUBMIT". A red circle with the number "5" points to the "SUBMIT" button.

CALL DISPOSITION	
A - Answering Machine	AC - Accounts
Agent - New Lead Agent	B - Busy
Bus - Bus	CALLBK - Call Back *
Cancel - Cancellation	Car - Car
DC - Disconnected Number	DEC - Declined Sale
DNC - DO NOT CALL	Dom - Domestic
FareQu - Fare Quotation	HOLI - Holidays
Hotel - Hotel	Imagic - Imagica
INTL - International	Issu - Issuance
LB - LUNCH BREAK	N - No Answer
NI - Not Interested	NP - No Pitch No Price
OP - Other Products	Pranam - Pranaam
QueTic - Queue Ticketing	Rail - Railway
Reissu - Reissuance	SALE - Sale Made
SimCa - Sim Card	SSRin - SSR/Infant
TB - TEA BREAK	Tech - Technical

PAUSE AGENT DIALING
CLEAR FORM | SUBMIT

Figure 271 Select Disposition Status

6. After the call is disposed, agent status is changed to “Ready”, meaning that now the agent is ready to take the next call.
7. To make an outgoing call, click **Pause**.
8. Select Pause code and dial next call.

17.2.1.4 Pause

Pause allows the agent to make an outgoing call when the agent cannot receive an incoming call. In any of the cases, the agent has to select the Pause Code (if configured). This helps the administrator in tracking the pause time of the agent through Agent Reports, such as Agent Performance Report, Agent Activity Report, and Agent Break Bifurcation Report.

Prerequisites

To enable Pause Code while clicking Pause:

1. Log in to Neox DC as administrator.
2. Go to *Campaign Management>>Campaign>>Create/Modify Campaign*.

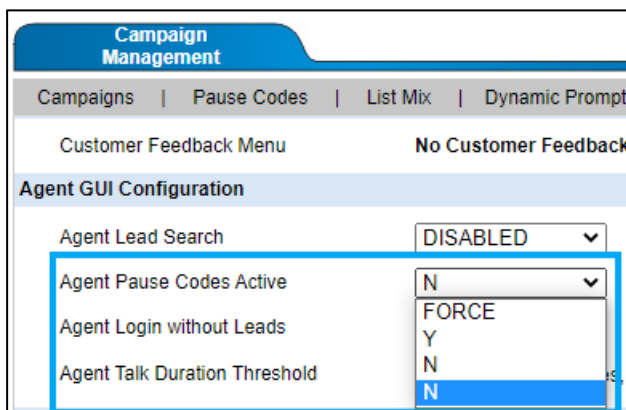
To pause a call:

1. Click **Pause** to manually dial a new lead.



Figure 272 Pause Call

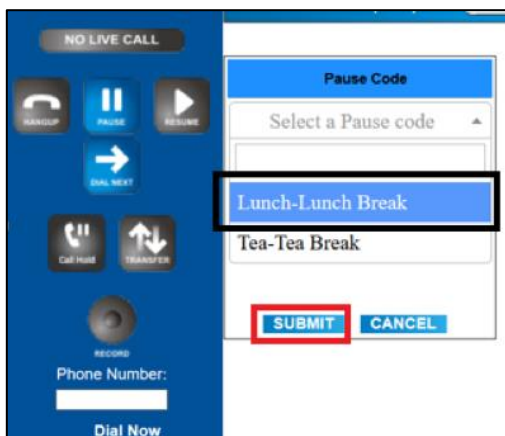
2. Based on the **Agent Pause Codes Active** settings in **Campaign Management**, there are three different scenarios to change the status to Pause.



- a. Agent Pause Codes Active is set to **N** – In this case, the Pause Code selection window is not displayed.
- b. Agent Pause Codes Active is set to **Y** – In this case, the Pause Code selection window is displayed. Selection of the Pause code is not mandatory. Click **Submit**.



- c. Agent Pause Codes Active is set to **FORCE** – In this case, the Pause code selection window is displayed. It is *mandatory* to select the Pause code. Select the Pause code and click **Submit**.



3. Agent’s status changes to **PAUSED**.

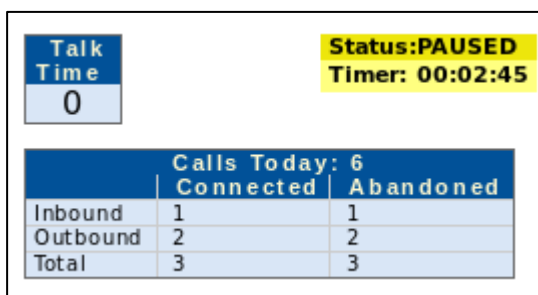


Figure 273 Pause Status

17.2.1.4.1 For Manual and Preview Dial Method

If the Pause Code is *activated* in the *Campaign* by the Administrator, then the application displays the **Pause** button on the agent screen. To set the pause code, click on the Pause button and select the required pause code from the drop-down list.



17.2.1.5 Resume

Resume allows the agent to receive incoming calls. Doing so, status is changed to “Ready”. This means, now the agent is ready to receive incoming calls.

To receive incoming call:

1. Click **Resume**.

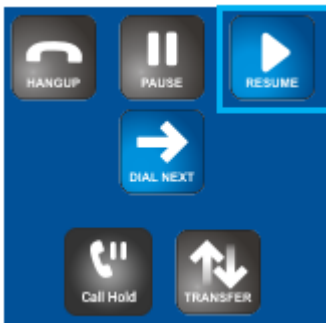


Figure 274 Resume

2. Agent’s status is changed to READY.

Talk Time 0	Status:PAUSED Timer: 00:02:45
Calls Today: 6	
	Connected Abandoned
Inbound	1 1
Outbound	2 2
Total	3 3
GROUPS Agents View +	
Customer Time	
Customer Time	
Date & Time	2020-03-04 15:37:48
Status	
Calls in Queue: 0	
UniqueID : No Active Call	
Logged In Details	
User	U9002
Phone	9002
Campaign	camp_1

Figure 275 Agent Status changed to Ready

17.2.1.6 Call Hold

Agent can place an incoming or outgoing call on hold.

To put a call on hold:

1. Click **Call Hold**.

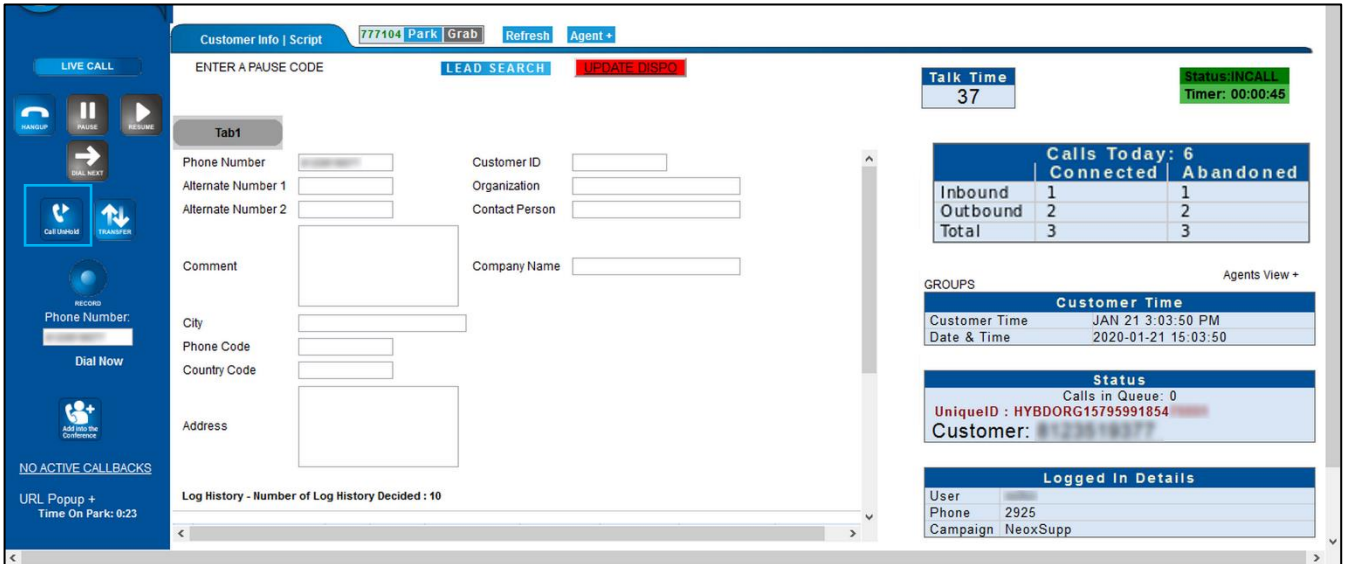


Figure 276 Call Hold/Unhold

2. Music on hold file is played (configured in *Administrator>>Campaign Management>>Campaign*).
3. Click **Call Unhold** to unhold the call.

17.2.1.7 Transfer

Agent is allowed to transfer a call in four ways as follows:

1. Transferring the call to any other in-group.
2. Transferring the call to an agent.
3. Transferring the call to an external number (not in the system).
4. Transferring the call to predefined profile (external numbers).

Prerequisite

1. AGENTDIRECT Ingroup must be created and assigned to the agent.
2. Call Transfer must be enabled in Campaign.

To transfer an incoming/outgoing call:

1. Click **Transfer**.



Figure 277 Transfer

2. Call Transfer pop up appears.
3. You can transfer the call in any of the following ways:
 - Select a group to transfer the call and click **Group Transfer**.
 - Select a number to transfer the call and click **Transfer**.
 - Enter External Number to call and click **Transfer**.

- To transfer call to an agent, click **Agents**.

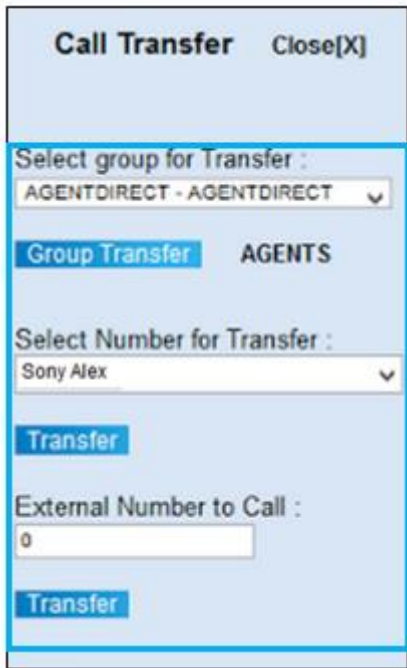


Figure 278 Transfer Call

4. Available Agents Transfer screen appears. You can see the list of available agents, such as agent that is ready, in-call or paused. Select a ready status agent to transfer the call.

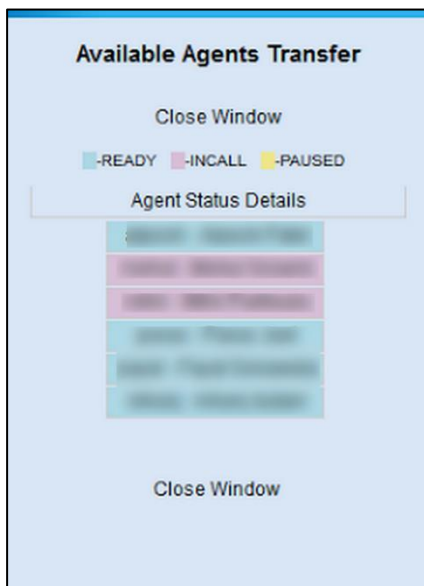


Figure 279 Transfer call to agent

17.2.1.8 Record

Pre requisite

1. Enable Campaign Recording from *Administrator>>Campaign Management>>Campaign*.
2. Campaign based configuration.

To record a call:

1. Click **Record**.

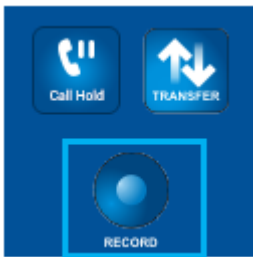


Figure 280 Call Recording

2. The recording is available in CDR to play/download to the administrator.

17.2.1.9 Conference

This feature allows the agent to communicate with the customer and other participant (supervisor) through a conference call.

Prerequisite

1. Administrator has to create a Conference Room and bind with a Campaign.
2. Call Routing should be available to route conference call. It is configured from *Neox EMS>>Call Processing>>Call Routing*. Refer to *Neox EMS user guide*.

Steps to do Conference Call:

1. Let's say, Agent is A, Customer is C, and Supervisor is S.
2. A calls C.

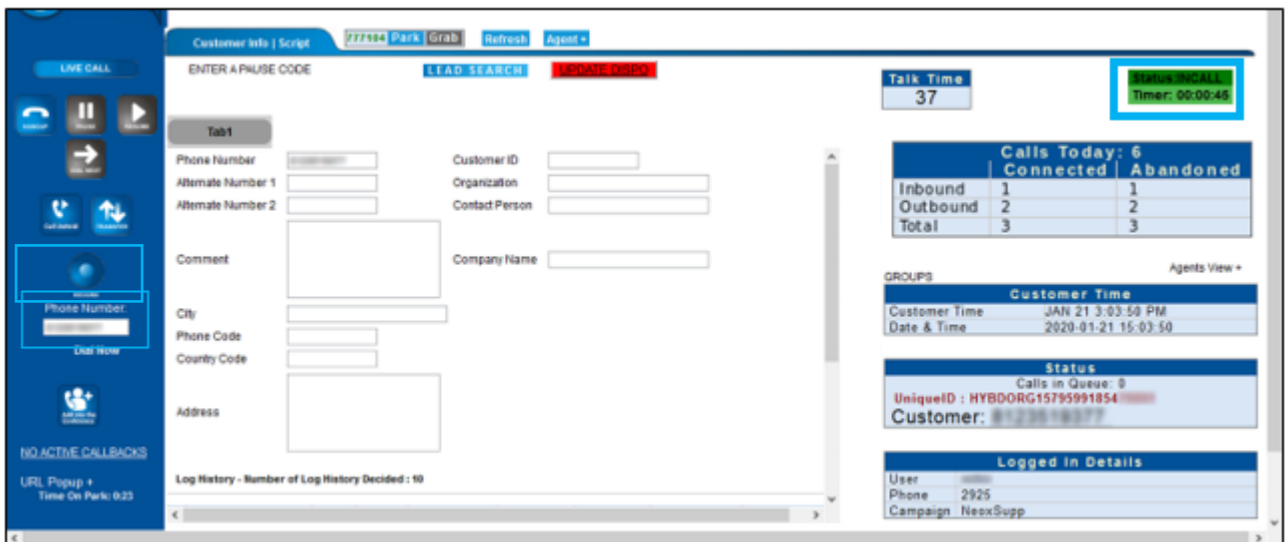


Figure 281 A calls C

3. After the call is connected, now A can have a conference call with C and S.
4. To add S, first place C's call on hold by clicking **Call Hold**. C's call gets on hold.



Figure 282 Call hold

5. Now, A can add participant S by clicking **Add into the Conference**.



Figure 283 Add into the Conference

6. On clicking, agent gets two options to add S:

- Add in group, where the agent can select an existing ingroup. Click **Group Conference**.
Or,
- Add an external number, where the agent can enter a number to add in conference. Click **Conference**.

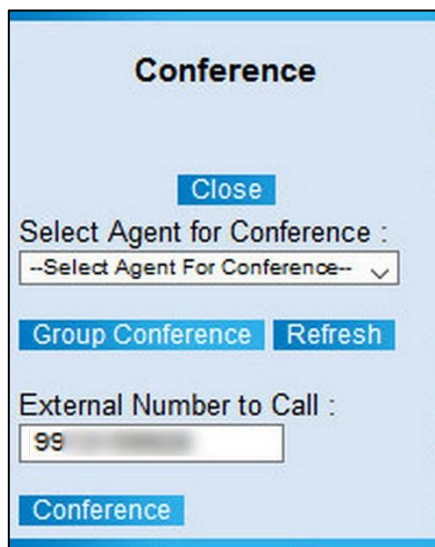


Figure 284 Select In group agent or enter external number

7. After adding S, unhold C by clicking **Call Unhold**.



Figure 285 Unhold Call C

8. Click **Start Conference** to start conference call.

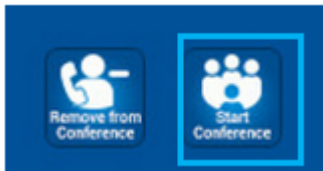


Figure 286 Start Conference

9. Conference call is established and now A, C, and S can communicate with each other.

10. Now, agent can perform any of the following:



Figure 287 Other actions

- If agent A wants to remove S from the conference and wants to continue conversation with C, then click **Remove from Conference**.
- If agent A wants to leave the conference, however wants C and S to be connected, then click **Leave Conference**.
- If agent A wants to disconnect the conference, then click **Disconnect Conference**.

17.2.1.10 Call back

Call back allows the agent to call the customer at the scheduled time when a customer is busy, does not answer the call, or request a callback.

An agent can get callback requests in the following ways:

- **My Callback Only** – The callback gets assigned to the same agent who raised the callback request. To view, select the “My Callback Only” option.
- **Anyone** – The callback request gets transferred to any agent in the same campaign. This functionality notifies the agent that the system has ANYONE-type callbacks along with the count.

17.2.1.10.1 My Callback Only

Steps to schedule call back:

1. While disposing a call, select **Call Back**.



Figure 288 Call Back Disposition Status

2. Click **Submit**.
3. Select a Callback Date screen appears.
4. Select a date from the calendar and time (12 hours) to schedule the call back request. Enter comments, if required.

5. Click **Submit**.

Select a CallBack Date
Close [X]

2020-01-16 Hour: Minutes:

My Callback Only

CallBack Comments:

SUBMIT

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			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	

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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				

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			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		

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					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						

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	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				

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						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					

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		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			

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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					

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		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		

Figure 289 Schedule Callback

6. You will get a notification of the scheduled callback at the defined time.
7. If you want to call the customer before the scheduled time, then click PAUSE and then click the notification "ACTIVE CALLBACKS".

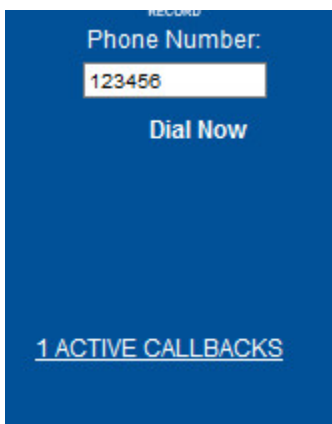


Figure 290 Active Callback Notification

8. Callback for Agents screen appears. Callback details appear. Scroll right to find the **Dial** button. Click **Dial**. Click **Refresh** to refresh this list.

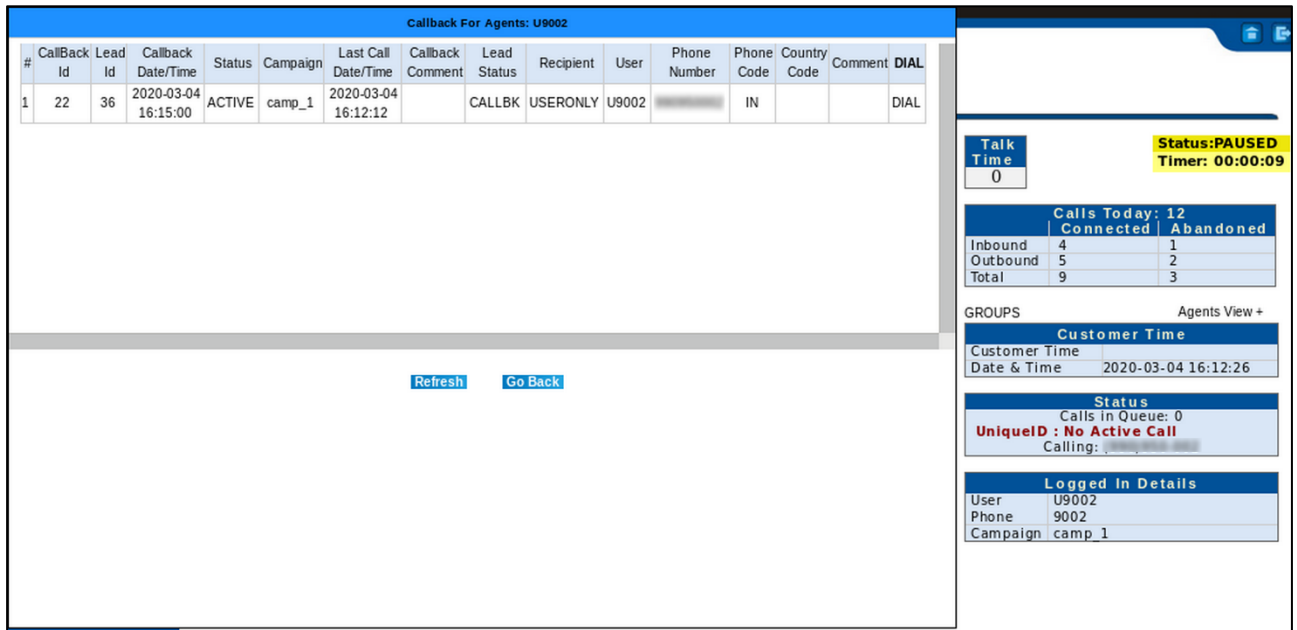


Figure 291 Notification screen

Or,

9. Agent gets an alert at the callback scheduled time.

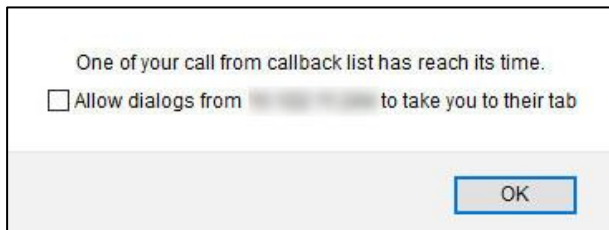


Figure 292 Alert from callback request

At the same time, color of notification also changed to Yellow.

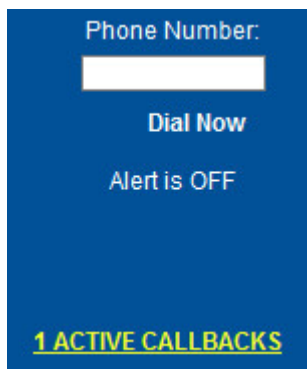


Figure 293 Active Callback

10. Click **PAUSE** and then click the notification. Following screen appears.

11. Click **Dial** to dial the number.

Callback For Agents: paras																			
Alternate Number 1	Organization	Alternate Number 2	Contact Person	Comment	Last Name	City	Inbound Lead Priority	Phone Code	Email Address	Outbound Lead Priority	Area	Entry Date	Last Date	Country Code	Region	Address	Recipient	User	DIAL
												Paras	0000-00-00 00:00:00	0000-00-00 00:00:00	0	0	USERONLY		DIAL

[Refresh](#) [Go Back](#)

Figure 294 Dial Callback Request

12. As you click Dial, agent home screen appears. Click any one of the following options:

- Dial Lead – Allows dialing the lead.
- Skip Lead – Allows skipping the lead.
- Trash Lead – Allows sending the lead to trash.

The screenshot shows the Neox agent interface for 'Sterlite Technologies'. The top bar includes the Neox logo, 'Sterlite Technologies', and 'Welcome agent-01'. Below this is a 'Customer Info | Script' section with a 'PREVIOUS CALLBACK' and 'LEAD SEARCH' button. A 'Talk Time' widget shows '0' and 'Status: PAUSED' with a timer of '00:00:21'. A 'Calls Today' summary table is displayed:

Calls Today: 12		
	Connected	Abandoned
Inbound	4	1
Outbound	5	2
Total	9	3

The main area contains a 'Customer Time' widget showing '2020-01-16 19:44:47' and a 'Status' widget indicating 'No Active Call' with options for 'DIAL LEAD', 'SKIP LEAD', or 'TRASH LEAD'. A 'Logged In Details' widget shows agent information, and a 'Previous Callback Information' widget is at the bottom right. On the left sidebar, there are call control buttons (Hangup, Pause, Resume, Dial Next, Call Hold, Transfer) and a 'LEAD PREVIEW' button. The bottom left shows '1 ACTIVE CALLBACKS'.

Figure 295 Dial/Skip/Trash Lead

17.2.1.10.2 Callback Assigned to Anyone

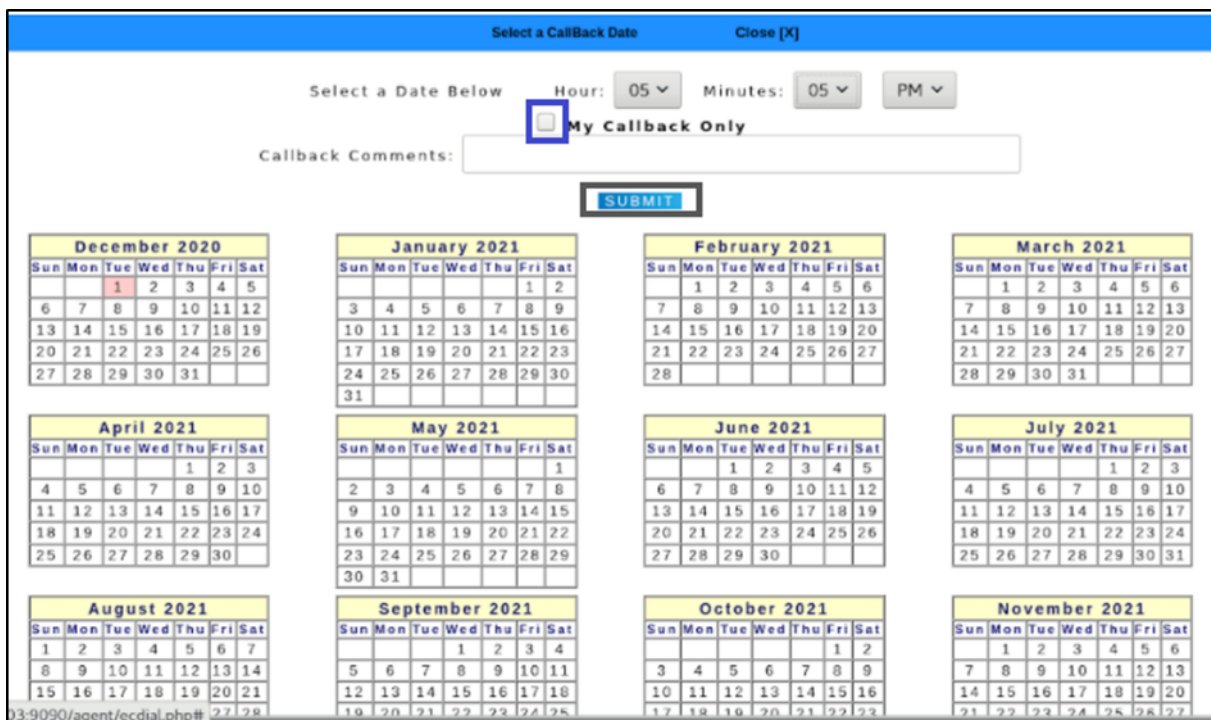
Follow the below steps to assign the callback to any agent in the same campaign.

1. While disposing a call, select **Call Back**.



Figure 296 Call Back Disposition Status

2. Click **Submit**.
3. Select a Callback Date screen appears.

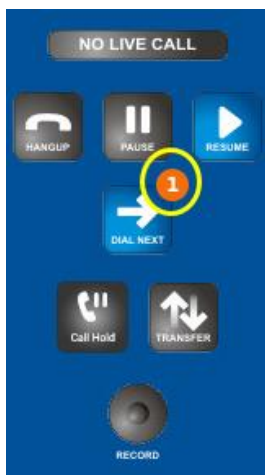


4. Select a date from the calendar and time (12 hours) to schedule the call back request.
5. Type **Callback Comments**, if required.
6. **Clear** the **My Callback Only** checkbox.
7. Click **Submit**.

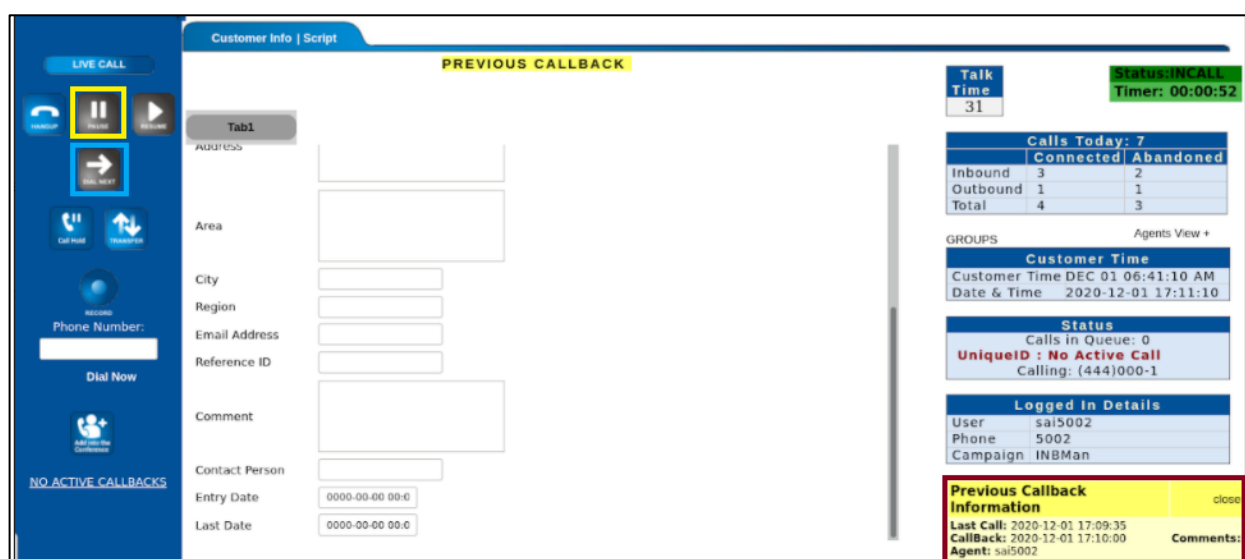
- The active callback notification is displayed in Black color on the **Dial** button of all the agents in the same campaign.



- Once the status changes to *Live* (when the set callback time is reached), the notification color changes from Black to Orange. Click the **Pause** button followed by the **Dial** button to place the callback.



The callback information appears in the bottom right-hand corner of the screen.

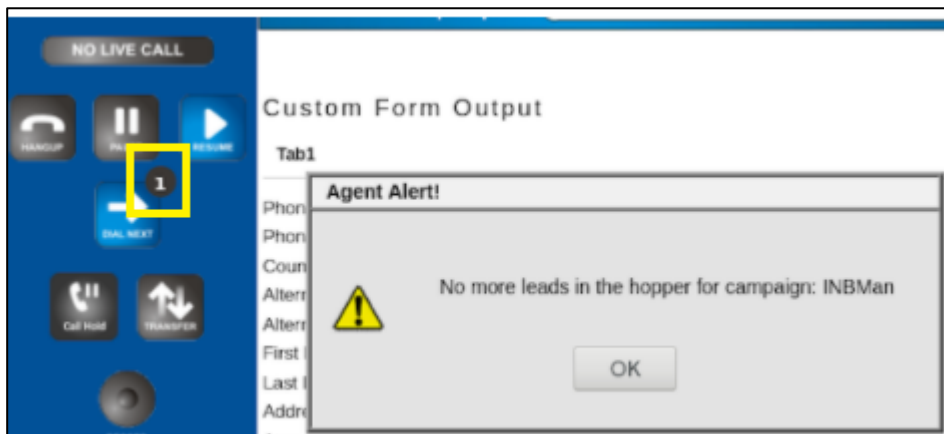


Note

- Before clicking the Dial Next button to place the outbound call/callback, click the Pause button. Else, the following message is displayed.



- You can make a callback only when the callback notification status is live (notification color changes to Orange). If you click the Dial Next button during the Active status, the application doesn't let you place the callback and displays the following message.



- Once the callback is successful or the same customer calls back before the set callback time, then the callback notification disappears from the Dial Next button.
-

17.2.2 URL Popup

URL Popup enables the agent to access or track all URL Popups. For this, click the URL popup to view the details.

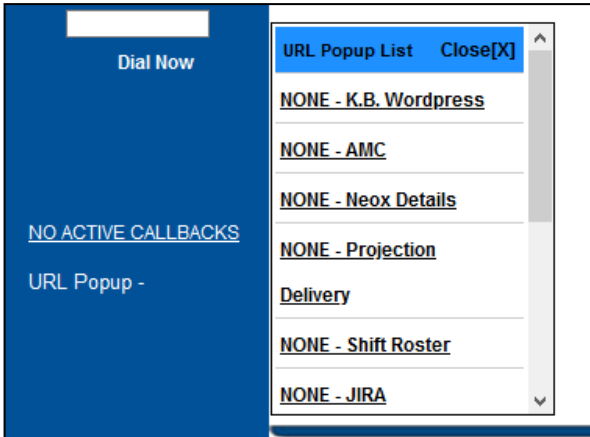


Figure 297 URL Popup

17.2.3 Agent Alert

Agent Alert displays the alert to the agent, enabled by the administrator for the incoming call.

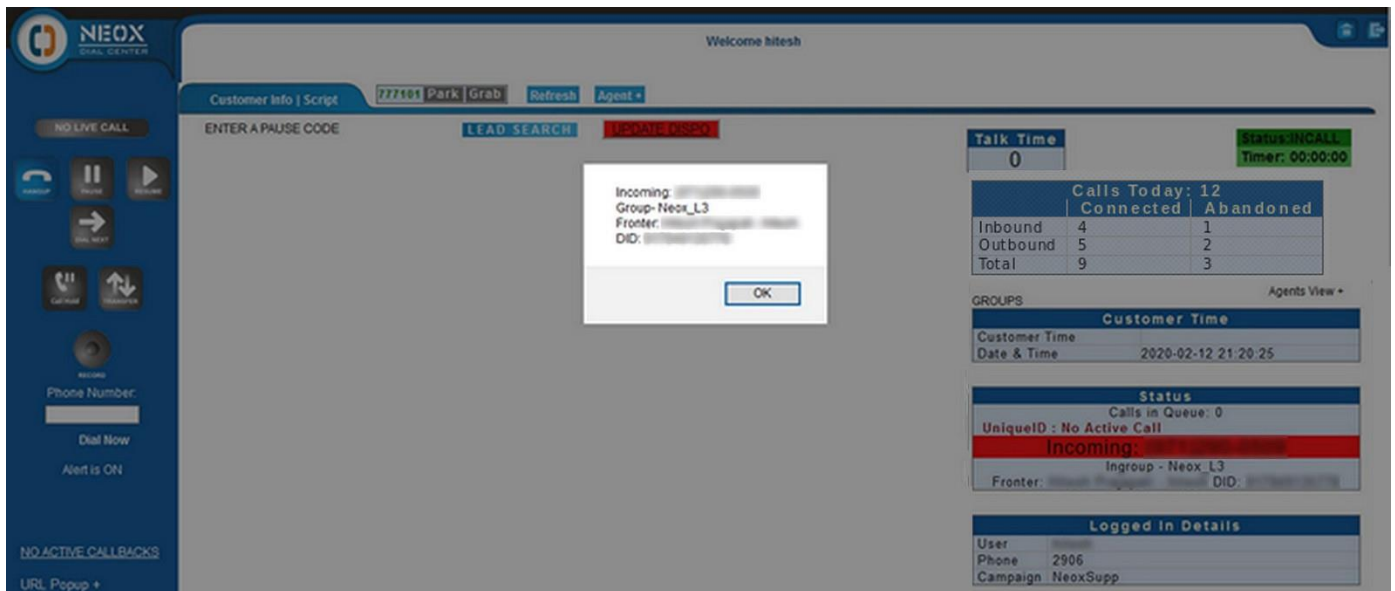


Figure 298 Agent Alert

17.2.4 Work Area

17.2.4.1 Call Park

Note

This module is deprecated.

Call Park allows the agent to park an incoming call. The incoming call is parked in the agent's parking slot. The parking slot can be of an agent, getting an incoming call or other agent's parking slot.

For example, Agent A has Parking Slot 777107 and other available agents are B and C.

Call Park can be done in two ways:

- A can park the call in its parking slot "777101". Doing so, only the A can grab the call and not the other agents, B and C.
- A can park the call in other agent's parking slot, B or C. Doing so, only the agent (B or C) of that parking slot can grab the call.



Figure 299 Call Park

Prerequisite

Parking Slot should be available.

Steps to do Call Parking

On getting an incoming call:

1. Click **Park**. Call is parked. Music on hold file is played (configured by Administrator).



Figure 300 Call Parking

Or,

To park the call on other agent's parking slot, then click **Agent** and select an agent.



Figure 301 Park call on other agent's parking slot

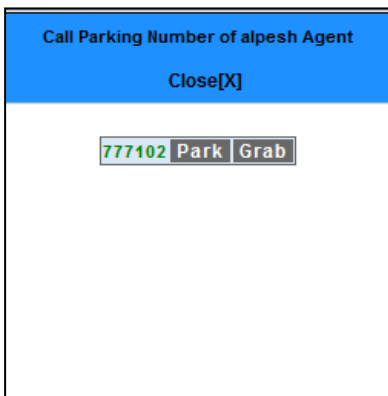


Figure 302 Call Parking

- At the time of parking the call, enter the comments. Click **Ok**.

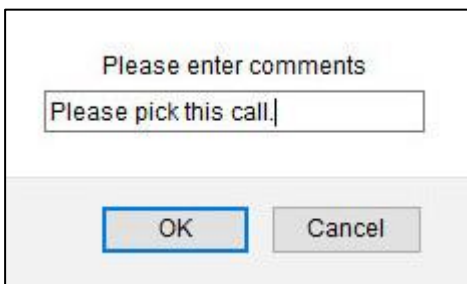


Figure 303 Enter comments

- When the call is parked, then the parking slot turns Red to indicate the a call is parked.



Figure 304 Call Parked

- Any comments mentioned while parking the call can be seen on mouse hovering on the parking slot.

The screenshot shows a call management interface with the following elements:

- Top bar: 777107 Park Grab Refresh Agent +
- Call details box:
 - Phone Number : 9712900509
 - Name :
 - Comments : Please pick this call.
- Action button: UPDATE DISPO (highlighted in red)

Figure 305 Comments

- Now, when the agent wants to grab the call, click **Pause**.
- Click **Grab** to receive the parked call. The call is attended by the agent.
- Click **Refresh** to see if any call is parked.

17.2.4.2 Lead search

Lead Search allows you to search the lead information.

To search a lead:

- Click **Lead Search** on agent's portal. To get this option, enable Lead Search from *Administrator>>Campaign Management>>Campaign*.
- Enter the search criteria and click **Submit** to get a list of leads matching the search criteria.

The screenshot shows a form titled "Search For a Lead" with a "Close [X]" button in the top right corner. The form contains the following fields:

- Phone Number: 1234578900
- Phone Code:
- Country Code:
- Alternate Number 1:
- Alternate Number 2:
- Outbound Lead Priority:
- Inbound Lead Priority:

At the bottom of the form, there are two buttons: **SUBMIT** and **RESET**.

Figure 306 Lead Search

3. Select a Dispo Status according to your requirement.

Update DISPO close [X]															
<input checked="" type="radio"/> All CDR <input type="radio"/> Improperly Disposed CDR <input type="radio"/> Auto Disposed CDR															
#	Call Date	Line	Login ID	Agent Extension	Customer Number	Call Receive Time	Outgoing Call Time	Talk Time	User	Campaign	Disposition	Disposition Time	Speed to Answer the Call	Abandoned Time	Update Status
1	2020-01-21 15:30:04						15:30:04	0:00:12	mihir	NeoxSupp	Auto Dispo Success Calls	0:00:05	00:00:00		CALLBK-Call Back
2	2020-01-21 15:27:48						15:27:48	0:00:40	mihir	NeoxSupp	Auto Dispo Success Calls	00:00:00	00:00:00		-- Please Select Status --
3	2020-01-21 15:29:25						15:29:25	0:00:27	mihir	NeoxSupp	Auto Dispo Success Calls	0:00:28	00:00:00		-- Please Select Status --
4	2020-01-21 15:17:02						15:17:02	00:00:00	mihir	NeoxSupp	Agent Not Available	0:00:04	00:00:00	0:00:01	-- Please Select Status --
5	2020-01-21 15:14:20						15:14:20	00:00:00	mihir	NeoxSupp	Call Back Hold	0:00:16	00:00:00		-- Please Select Status --
6	2020-01-21 15:13:59						15:13:59	00:00:00	mihir	NeoxSupp	Call Back Hold	0:00:12	00:00:00		-- Please Select Status --
7	2020-01-21 15:03:05						15:03:05	0:03:25	mihir	NeoxSupp	Auto Dispo Success Calls	0:00:01	00:00:00		-- Please Select Status --
	2020-01-21										Auto Dispo				

Figure 309 Update Dispo

4. A confirmation message appears. Click **OK**.

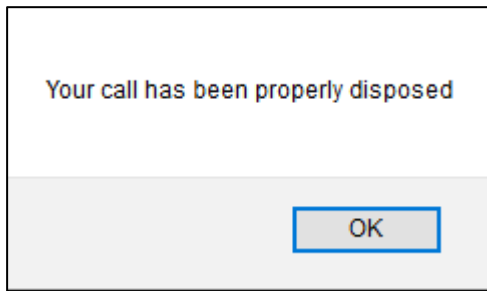


Figure 310 Confirmation message

17.2.4.4 Script

Script facilitates the agent to view the script created, by default, to assist the agent while having conversation with the customer.

Prerequisite

1. Scripts should be configured in *Neox DC>>Service & Feature>>Scripts*.
2. Script should be bind with the Campaign.

To access Script:

1. Click **Script** tab.

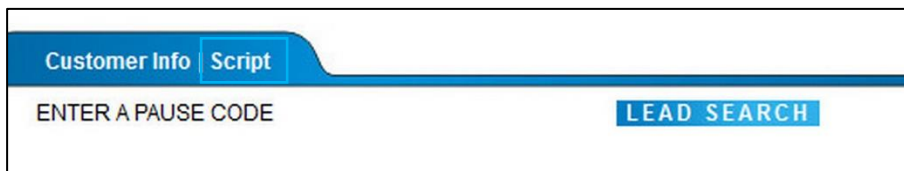


Figure 311 Script

2. Script appears. Agent can use this script while talking with the customer.

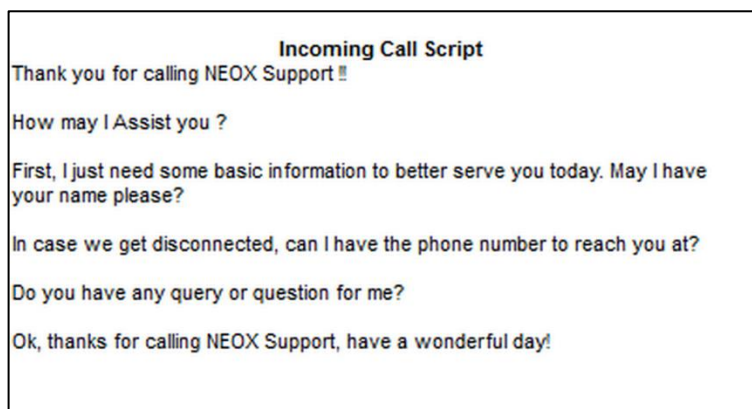


Figure 312 Script

17.2.4.5 Customer Information

Customer Info facilitates the agent to view the customer information.

To access Customer Info:

1. Click **Customer Info** tab.



Figure 313 Customer Info

17.2.5 Customer and Agent details

The right panel provides the following options:

1. Agent's Status – Displays the current status of agent, such as READY and PAUSE with the total time of current status.
2. Talk Time – Displays the call duration of the agent with the customer.
3. Calls Today – Displays the total count of inbound and outbound calls in a day. Here, Connected calls displays the number of calls successfully connected, whereas Abandoned displays number of failed calls due to any reason such as call not answered and so on.
4. Customer Time/ Date and Time - Displays the current system date and time.
5. Status - Displays details of the call like Call in Queue, Call Unique Id, Incoming Number, if Inbound, then Ingroup Name and so on.
6. Logged in Details - Displays the agent details, such as User – Agent Username, Phone – Agent Phone Number, and Campaign in which Agent has logged in.
7. Agents View + - Click to view the status of the logged in agent.

Calls Today: 6		
	Connected	Abandoned
Inbound	1	1
Outbound	2	2
Total	3	3

Customer Time	
Customer Time	
Date & Time	2020-03-04 15:37:48

Status	
Calls in Queue:	0
UniqueID :	No Active Call

Logged In Details	
User	U9002
Phone	9002
Campaign	camp 1

Figure 314 Right Panel Options

17.2.6 View CDR and Statistics on Agent Screen

The right panel provides the following options:

1. To view CDR and agent statistics on agent screen must enable **View CDR and Statistics on Agent Screen**.

The screenshot shows a web interface for 'System Management' with a sub-section 'Modify a Server Record'. The interface is divided into several configuration panels:

- Server Configuration:**
 - Neox Server IP: 10.121.21.229
 - Neox Server Port: 5038
 - Local GMT: 5.50 (Do NOT Adjust for DST)
 - Server Logs: Y
- System Configuration:**
 - Redirect Prompt File: Choose File (No file chosen)
 - Redirect Repeat Count: 1
 - Agent View Log History: 0 (If 0 means No Log History, Else Number of Recent Log History)
 - Timeclock End Of Day: 00:00 (HH:MM)
 - View CDR and Statistics on Agent Screen: Enable
 - View and Update all CDR: Enable
 - View and Update Improperly Disposed CDR: Enable
 - View and Update Auto Disposed CDR: Enable
 - Predictive Dialing: Enable
 - SMS Preprocessing: Enable
 - EMAIL Preprocessing: Enable
 - CRM Notify Preprocessing: Enable
 - Neox Recording Resource URL: http://10.121.21.229:9090/admin/file_browse/recordings (Ex: http://10.106.1.213/.. or https://10.106.1.213/..)
 - Customer PhoneNumber Hiding: Super User Agent Dashboard
- Phone number configuration:**
 - Minimum Length: 7 (Range between 1 - 100)
 - Maximum Length: 18 (Range between 1 - 100)
- Report Management Configuration:**
 - Time(second) Slab: 30 (Time slab Duration for inbound call handle report (Answered and Dropped))

A 'SUBMIT' button is located at the bottom of the form.

Figure 315: Enable View CDR and Statistics on Agent Screen

2. After enabling **View CDR and Statistics on Agent Screen** configuration, we can see the link shown below in the agent screen.

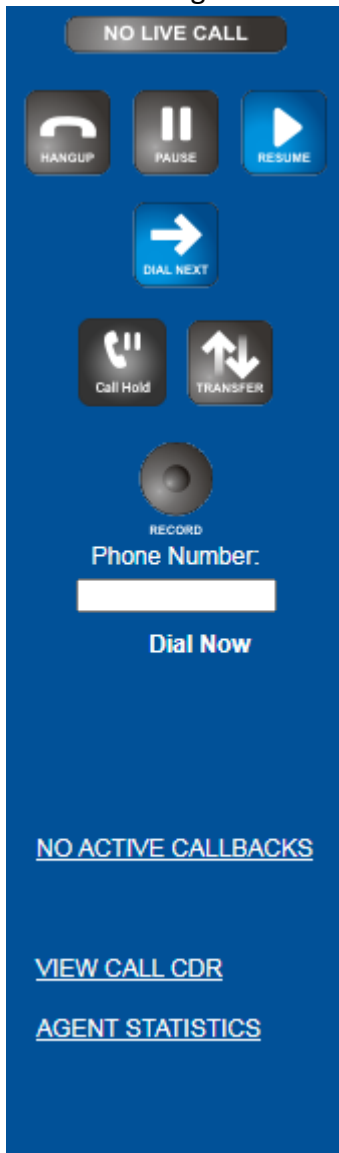


Figure 316: Right Panel to View CDR and Statistics on Agent Screen

3. Clicking on the **VIEW CALL CDR** link will launch the CDR pop-up, which will open as shown below.

Agent : U5001 Call CDR Listing close [X]

From Time : 00 hh 00 mm 2022-05-01 To Time : 23 hh 59 mm 2022-05-30

Inbound Group: ---EMPTY---
 ---ALL---
 AGENDIRECT - AGENDIRECT

Campaign: ---ALL--- SUBMIT

Call Category: All Phone Number:

Number of record per page : 10

Number of Records : 5

#	List	DID Line	Campaign	Group	Call Date	Extension	Phone Number	Call Type	Total Duration	Talk Duration	Status	Customer Dispo Status	Term Reason	Customer Time	Abandoned Time	UniqueID	Call Rank
1	1001	777	c1	ingrp1	2022-05-11 17:33:05	5001	3010001	Abandoned	00:00:51	00:00:20	No Answer		AGENT	2022-05-11 17:33:05	00:00:51	CI1652270585365	-1
2	1001	777	c1	ingrp1	2022-05-11 17:30:37	5001	3010001	Answered	00:00:57	00:00:27	Not Interested		AGENT	2022-05-11 17:30:37		CI165227043779	-1
3	1001	777	c1	ingrp1	2022-05-11 17:04:06	5001	3010001	Abandoned	00:00:53	00:00:22	Busy		CALLER	2022-05-11 17:04:06	00:00:53	CI1652268846384	-1
4	1001	777	c1	ingrp1	2022-05-11 16:49:37	5001	3010001	Answered	00:01:11	00:00:40	Not Interested		AGENT	2022-05-11 16:49:37		CI1652267977836	-1
5	1001	777	c1	ingrp1	2022-05-11 16:38:47	5001	3010001	Answered	00:01:29	00:00:57	Not Interested		AGENT	2022-05-11 16:38:47		CI1652267327165	-1

1

Figure 317: View CDR Screen

4. Clicking on the **AGENT STATISTICS** link will launch the agent statistics pop-up, which will open as shown below.

Agent : U9001 Call Statistics close [X]

From Time : 00 hh 00 mm 2022-07-01 To Time : 23 hh 59 mm 2022-07-30 SUBMIT

Total Calls : 235			
	Connected	Abandoned	Total
Inbound	5	2	7
Outbound	124	104	228
Total	129	106	235

Event	Event Duration
Talk	1:13:28
Pause	11:20:47
Wait	19:15:23
Dispo	2:43:34
Hold	0:20:50
Logged Time	68:16:31

Break	Break Duration
No Data Found	

Figure 318: AGENT STATISTICS

Note: While an Agent is INCALL, then that agent will not be able to see the link in order to view its own activity statistics and Call CDR.

18. Acronyms

This appendix displays common abbreviations used across the user guide.

18.1 Acronyms in user guide

Table 18-1 Acronyms

Acronyms	Description
ANI	Automatic number identification
ACL	Access lists
API	Application Program Interface
ACD	Automatic Call Distribution
BCC	Blind Carbon Copy
CC	Carbon Copy
CDR	Call Detail Record
CRM	Customer Relationship Management
CSV	Comma Separated Values
DC	Dial Center
DNIS	Dialed Number
DID	Direct Inward Dialing
DNC	Do Not Call
FIFO	First In First Out
GUI	Graphical User Interface
ID	Identification
IP	Internet Protocol
IVR	Interactive Voice Response
MYSQL	Structured Query Language
PDF	Portable Document Format
SMS	Short Message Service
UNIX	UNiplexed Information And Computing System
URL	Uniform Resource Locator



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CIN – L31300MH2000PLC9261