**Spandana - CA Training-20230808\_175550-Meeting Recording**

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17m 57s

 **Speaker 1** 0:03
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 **Speaker 1** started transcription

 **Speaker 1** 0:06
So we are recording it again. So see basically once you come into the admin portal, OK, what you observe over here is the moment you log in you have few preset dashboards, OK? These are basically for your monitoring purposes. OK, this we will discuss in detail tomorrow. But for today let's understand how we add agents, configure the campaigns and all the other aspects which are necessary urgently.
Hello.
Near.
Take.
Recently we didn't train any client on that Contact Manager, so we don't have any recording, it's OK not.
Hmm. OK, 16 year. So once you are on the admin panel you need to create your users. So these are the options that you will work with the first the last option in the list is admin. So this is where you will basically come under people you will add agents. OK so once I click on agents you see these are the list of agents which are already created.
Okay. Now any agent that I don't need or I want to deactivate, I can click on it.
I can deactivate confirm and that I D is now deactivated from the platform backup to order.
I don't need it. Ohh data. Everything is there, data is never removed. I will get deactivated. OK, so it will say deactivated over here and this ID will not be useful anymore. Now if I come back here, activate it.
It's activated.
Now this agent will be able to log in. If you lock the ID your licence is active.
Yeah. So you will have like 20 agents, you will have 20 agent licences to create 20 agents. So now this agent is active.
Okay but you have logged this ID from logging in.
OK. Yes. So for some reason you said this agent is not out will not take calls for next one week. You'll log that ID for one week that cannot take calls, OK.
But if you deactivate that is a licenced deactivation and then you can go ahead and create more ideas there. OK, so now this is in terms of existing agent. If I have to add a new agent in the system you see here add agent so once you click here you can give name, e-mail ID, employee code okay as part of the agent ID. So let's say for example tell me one of your agent names.
I mean finding it right.
You can use capital lower anything. There is no limitation.
You want to use e-mail ID. You can add it. If not you just leave it as funny. Only thing to remember is the system will not accept spaces OK if you give spaces like let's say funny.
Test. If I try to create it won't take this. We done our testing for this calls. Yes, we have made two calls.
I don't know what, but the testing on through well, this is it. We dive into our selfie number for coding done or only only web.
Well, not quite all the numbers are only mobile advertise it.
Then tomorrow they are doing the live testing live demo dying 14. OK, so I don't request to call forwarding to the operators.
That we need to write a maybe one day it will live under that now because we have, we have to start.
Ohh I will check this translator.
With your beauty.
Hmm. We will want to.
I don't understand.
You need to check who is the.
You doing much? Will the team start logging in tomorrow from from the new portal directly then?
To take calls because something we can do directly from the login portal, something like that. So see when you want to do a live testing. OK where you want to see is the call coming in. Agents are logged in to whom the call went. How did they answer? We can do directly from DID you don't have to forward calls from your toll free number because that's your live customers who will get impacted okay. So let that be there like that only tomorrow when the team is there OK when they log in for half an hour 40 minutes.
With your teams being available, what you can do is you can call my DID numbers. There are three numbers that are given right. You can call any of the number and the calls will route to these agents OK. They can take call, see how it is working. Whatever are the observations when you make a note of it. While we are discussing, we can clarify that.
Of.
Play with your 10.
There is something to make presentation needed.
You know that looks good. Keep a look at you. Ohh me about you.
Speech.
No guess. So all you're creating an agent Idi gave an agent ID.
Here and I say gent name is like.
Honey e-mail ID.
I'm just creating one random idea. OK, I give the password OK.
What are the modes here? It's all dropped down, so you choose what modes has to be given to them.
OK. And once you define this, are the sip auto answer?
So in the old view it was. It was kind of displaying in a. What do you say elongated way where everything was in a horizontal method. Now it's more like a drop downs. OK then is there any specific agent data that you want to add? This is not very useful in your business case. This is purely for some Crms where they have some additional parameters to handle the agent ID. That's when you use it. If not skip this. OK, what are the skills they are going to be part of.
So there we had skills and then we used to add a priority, right. So here first level priority for me is.
2-3 skills that I add. OK then my second level priorities. Other 2-3 skills that I lied. Now the beauty is if I am adding one skill here, that skill for the second priority will not display so you don't confuse yourself while adding skills. OK, so this is how you will create the agent, OK?
It's gone.
Not.
Okay.
That was from down the.
So here, let me just show you.
So I like click on add.
You see, it's throwing an error. Why? Because I give space here.
So make sure that you use underscore hyphen at the rate or dot. These are the four special characters the system will support, so then you add it, it will work.
Okay.
You really both will show you can't names both. Yes, both of them will show you.
What are you number, babe?
An OK choice is yours. How you want to use. OK, now. Whatever skills are there that you have added to them. So the agent is now ready to log in. So like this, just come here. Click on add agent Add all the 20 agents who will be part of your business. Any ID that you don't need. You can simply open.
OK and deactivate it if you want to delete your you click on this.
The activate confirm you can even do the deactivation from here.
The activation and love 1/2 option. No removal, no removal. Once added, it will be lifetime. There will be in in the record because you should know right which agent was there which was not there.
OK, so all these deactivations you can do?
And whenever we want, we can reactivate. Yes, there's no timeline. 15 days, one month, something like that. Whenever.
At the moment, that's all been confirmed that they won't be because to be very precise product might change for some better enhancements. So at the moment it is said that whatever is created, it will be there actually in the older portal we have the option to delete. So if you come here.
OK, so let's say for example.
It's not showing anything yet, right? Because have deactivated all of them the moment I activate any agent like let's say activate funny.
In France.
Coming here.
Okay.
But that is why when I have deactivated all the agents, I'm not able to see it in the old portal. But here we have given the option to see the ideas but it is in an deactivated state OK.
Yes, sorry.
Tomorrow you're going to use the new portal only? Yeah, for admin, it's purely new portal for agent only. It's the old portal for time being requesting which are all option is showing. If you swim from starting to ending it is helpful because see the reason I'm actually going in from the bottom to top approaches. First they should know how to add their agents and all the basic things. If they know that they can actually do the settings today.
Tomorrow, when we start talking about campaigns, how the campaigns are managed, how the dashboards are viewed, how the reports are viewed, then they will be able to correlate that these are the agents they created. They tested with these agents and how the report is then displayed. That's why I said morning to the testing with the team for half an hour so that you make calls on did see how it is landing to them, how they are able to take calls there. They will also rise qnas. So when I come in the evening at 4:00 PM they will know we will already be ready with.
O qn is what needs to be clarified ABI jobi.
Okay got telika, but you understood. But tomorrow, who's going to give the testing after you come? Only if you're going to give testing, your team can log in and test. It's not required that I should be there.
Because there is no call forwarding or anything, you're just dialling the DID to see whom it is landing and how it is working.
The two agents use them now. Don't move. Entire agent group right now.
You will do what you.
Look, see you. First of all, we have to receive the credential login credential that we are not selected anything. Ohh you guys didn't even receive that should have just empty. We are waiting for your training and implementation. We don't. We do not show any credential, login password or anything. So we have already shared that to abhishek's ID right?
Yeah, yeah, it's better just because that makes life easy to understand, right?
Because I am sending all the details to Abhishek here management is already under force or something would have see Abhishek is there Kieran, you are also there, right?
Look, look, I didn't chill.
Abhishek kidding. You're part of the activation mail. OK, I need to check who received the.
But I have not had any logging because the testing more I can't do. Testing writing might be on the testing so we just need to be used to as actual team. We are calling CS customer support service.
The team will start testing from tomorrow.
Hmm.
Sure, let's do this. First, we'll complete the configuration part for today, OK. And once we can complete this tomorrow, once I'm here at 4:00, we'll ask all the teams to bring their laptops. Why you? I was requested for the enormous flow training before nothing. This is all new to team.
You alright? Now? How do they make calls, man?
From mobiles.
That's what everyone tells you. Happy phones are there, OK?
OK. No, you have to create agent here. So what you will basically do is you will come on to this particular screen OK click on admin. This is where your configuration to open up. I'll share it. Just call Abhishek once if he confirms I can share the credentials. I'll just give it up. You share it on me will forward steak. OK.
Because why are male? I can't say. Share it as per our IT policies. If I share password on it, my laptop will be seized. No, don't share the password. So how your shared to be shared or for testing purpose?
Certain that Abhishek is already received because only the PRC, whoever is the PRC, we send the password to them via e-mail. So they have.
I'm really really else for that. I don't want that one second. I'll tell you who is my POC here.
I thought the end of \*\*\*\*. No, I can add only one POC. That's my problem.
Ohh the check was there now.
So he would have received the mail with the password. Then you can initiate a mail to him. He will forward to me. So that is already shared. There is a separate team which has the password.
With even separately, yeah, try. I don't. I don't share the password because I'm not authorised to.
Hmm.
So even if you ask me right now, I'll call them up and I'll say send the mail again.
So there is a tool in which it actually sends automatically.
But there's still one.
Beautiful photos from the have different intentions. That's the only one so you can log in multiple users. Yeah. Yeah. So if there are four admins, all four admins can use the same login and login at the same time.
It's a multi tenant platform. You know any limit.
Yeah, if you want to have certain restrictions, certain guidelines are there with the IT that password policy is there in place then you will have to go for sub users in this credential for only for admin what you're saying correct? So after adding the agent So what we give the pin that can be used by agent, yes, I'll just screen not this screen.
Agent Agarwal admin cosmic Jacob the password with.
So from here whatever I want to know from main screen completely. Yeah this OK.
This is the main screen for you.
Don't login credential. So if I enter spandana and the password only then it works. If I go for agent only agent can enter here. So whatever is the agent username, password he cannot enter here you you you left an officer.
I don't know. I did not. We did not report any credential login credential from the. Did you have received?
What can we learn?
Something like this?
This will you Google Google.
Yeah.
How did Howdy craft project?
Yeah, when declared project.
Huh.
Garden.
Ohh.
I didn't hear Agent agent should be agent should do from there, right? But why here the option is there?
Ohh login.
No, no, this is not a new application they have.
I'm really not OK, but you said you should not use this for me for time being, this is under the fixes should do some older no admin only to do something.
Admin wise we have configured everything, everything is ready. So going forward agent we come here not now. So once we launch we will send e-mail to all the clients that this is now 100% live agents can start from here.
So please log in and that being part of, huh? This is the admin part here.
Good home screen here. What is home?
The home screen starts like this, OK?
Well, here we already want to know all options from if you want to go from bottom to top or top to bottom because we I am I am actually gonna cover each and everything which is there in this okay why I said agents first is you should know how to add agent when you add an agent what is the next step. I'll go in a sequential manner to make it seem less because very here. So how many options are there? I don't know is it a hundred 210 of no not.
Ohh options so we'll going I I should know what it is. Absolutely. See that's that's the primary thing that I also want to make sure that you are aware of each and every option that is there the first time I will do one later I will need to handle all my settlements.

 **Speaker 1** stopped transcription