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www.pulse.in

Pulse Dialer Setup

A brief lookup

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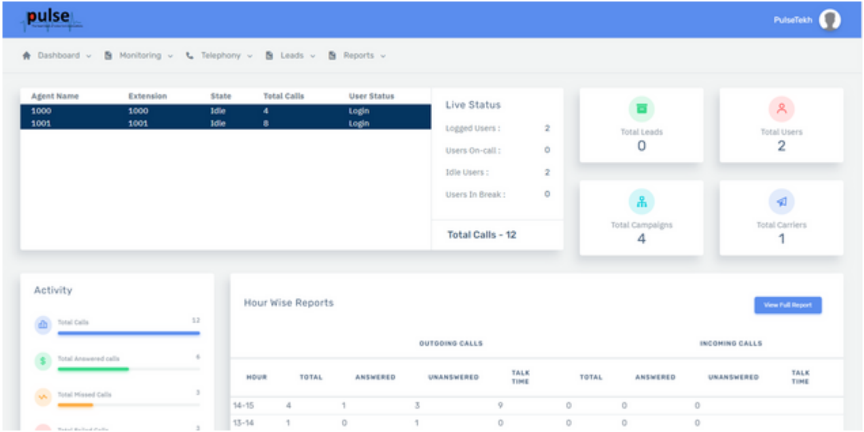


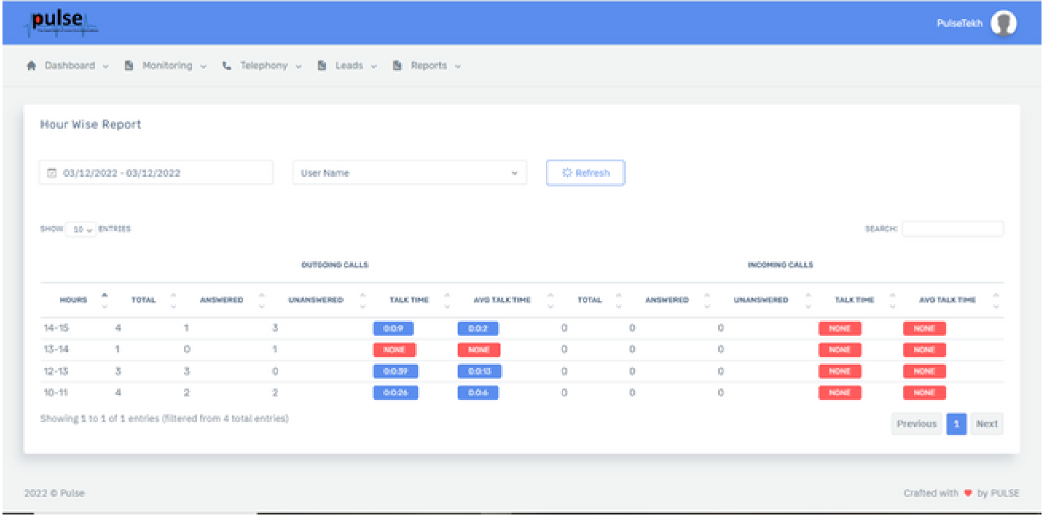
Dashboard

In this page, the live count of users logged in, users in-call, idle users and users in break will be displayed.

Along with this, each individual users' name, extension number, state (idle, in-call ,ringing), total calls and login/logout status is displayed. In addition to this, total leads, total SIP and total campaign is also displayed

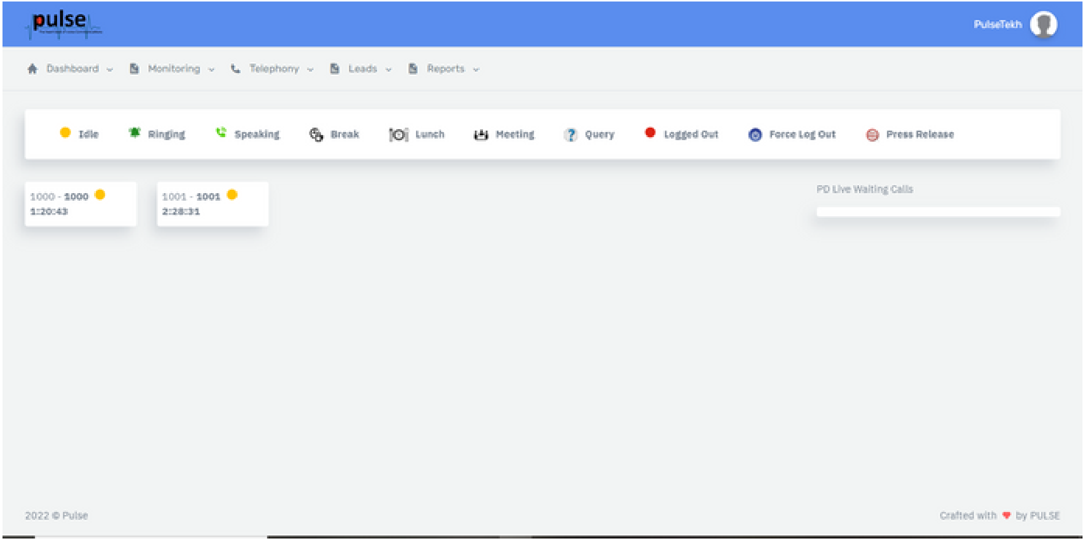
Under the section '**Activity**', overall calls made out of which answered, missed and failed is also specified

Hour wise reports



1. The section ‘**Hour Wise Reports**’, contains a live table displaying outgoing and incoming calls for every one hour. For viewing the entire day’s hourly report, a button named ‘View Full Report’ is placed in the same section
2. On clicking that button, you will be redirected to a new page where date filter & username filter is provided for viewing the table for the respectively dates and users
3. If both filters are not used, the current day’s hourly report will be displayed in the table

Monitoring


pulse
PulseTekh
Dashboard
Monitoring
Telephony
Leads
Reports
Idle
Ringing
Speaking
Break
Lunch
Meeting
Query
Logged Out
Force Log Out
Press Release
1000 - 1000
1:20:43
1001 - 1001
2:28:31
PD Live Waiting Calls
2022 © Pulse
Crafted with by PULSE

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Monitoring features

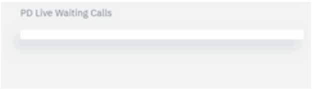
1	This page displays the live status of every individual user indicating their name and extension number	
2	**Idle**: Indicates that a user is logged in and not performing any call activity	Idle
3	**Ringing:** Indicates that the user is making call	Ringing
4	**Speaking:** Indicates that the user made call get connected and is speaking	Speaking
5	**Break:** Indicates that the user has gone for break	Break
6	**Lunch:** Indicates that the user has gone for lunch	Lunch
7	**Meeting:** Indicates that the user has gone for meeting	Meeting
7	**Query:** Indicates that the user is having doubts and has gone to consult his higher authority	Query

8 **Logged Out:** Indicates that user has logged out Logged Out

9 **Force Log Out:** Indicates that the user has left the session without proper log out. This occurs when the user by mistake closes the browser without clicking log out button. On clicking this option, the user's current session will be logged out and will be able to log in again into his account Force Log Out

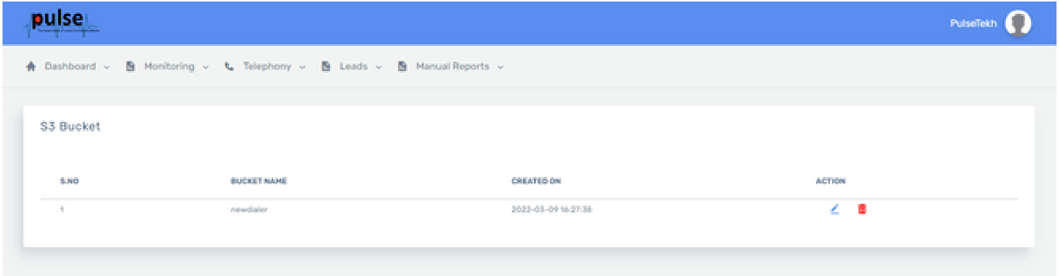
10 **Press Release:** Indicates that the user has clicked 'Done for the Day' button in the Dialer page and will not be able to login again for the rest of the day. On clicking this button, the user will be allowed to login again in the same day Press Release

11 Under '**PD Live Waiting Calls**' section, the live waiting call through predictive Dialer will displayed along with campaign name and it's mobile number



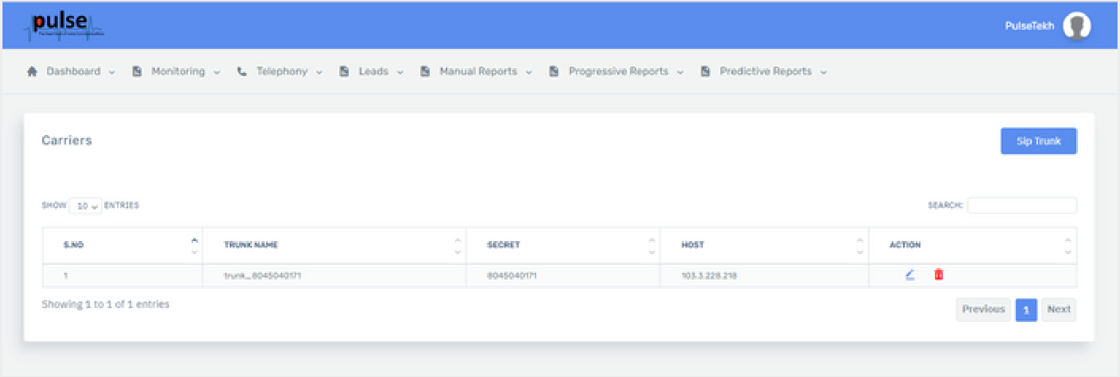
Telephony

S3 Bucket



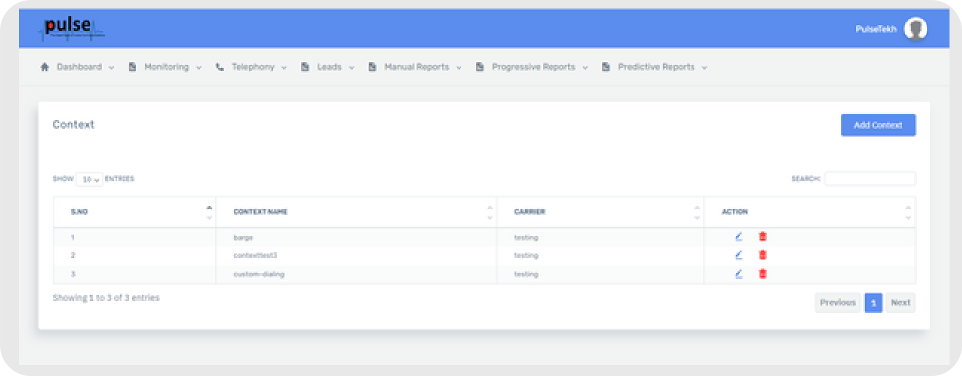
In this page, the list of AWS cloud S3 buckets will be listed which can be either edited or deleted.
The date of creation of the bucket is also available.
The call recordings will be stored in the created S3 bucket as a .wav file.
These recordings can be viewed in the CRR page.

Carriers:

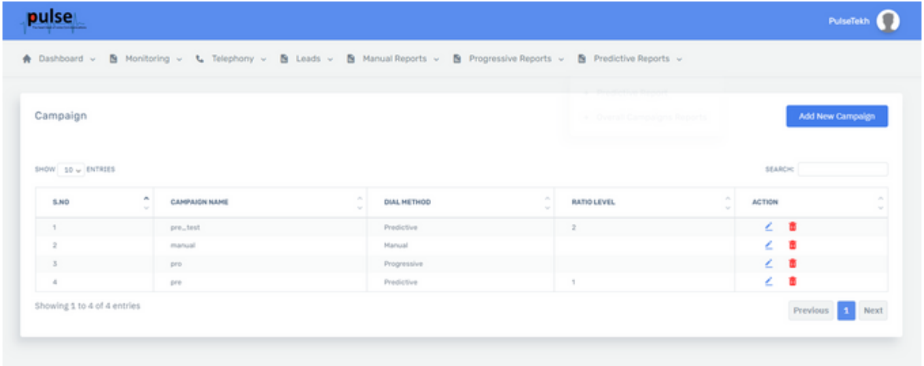


Session Initiation Protocol (SIP) trunking is a service offered by a communications service provider that uses the protocol to provision voice over IP (VoIP) connectivity between an on-premises phone system and the public switched telephone network (PSTN). In this page, the SIP Trunks can be created, altered or deleted

Context



The dialplan in **extensions.conf** is organized into sections, called contexts. Contexts are the basic organizational unit within the dialplan, and as such, they keep different sections of the **dialplan** independent from each other. You can use contexts to separate out **functionality and features**, enforce security boundaries between the various parts of our dialplan, as well as to provide different classes of service to groups of users. In this page, an option for creation, alteration or deletion of context is provided



Campaign

In this page, a campaign name can be generated and a dial method (Manual, Predictive and Progressive) can be mapped to it. A SIP trunk can be mapped to the respective campaigns.
There is also option provided to enable ratio level in case of predictive dialer.
All provided features such as campaign, dial method, SIP and ratio level can be altered or deleted

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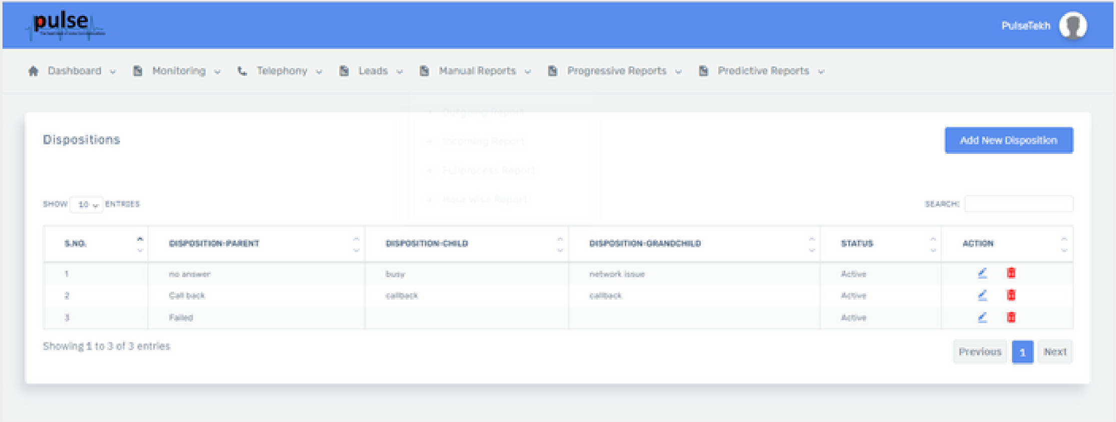
Disposition

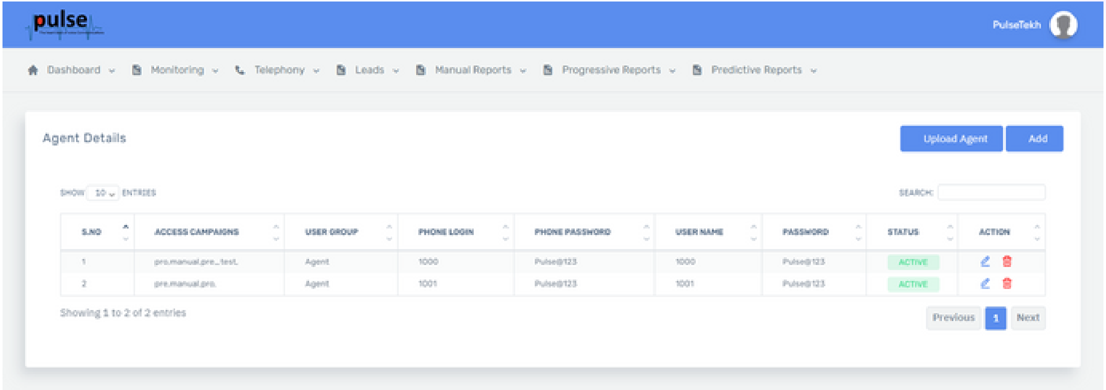


Disposition breif

- Once the user completes the call, the disposition dropdown will be visible where reason/feedback can be given regarding the call. Those dropdown menu will have a set of names say for example: No answer, Call back, Call failed, etc., Once selected another dropdown will appear which may be named as child disposition which contains a set of menu names that falls under the selected disposition. Once an option is selected from child disposition, another dropdown will appear which is grandchild disposition. This grandchild disposition will have a list of names that falls under selected child disposition

- This page, an option for creating, altering or deleting a disposition is provided. Based on the disposition, a child disposition can be generated. Similarly a grandchild disposition can be created based on respective child disposition. In addition to this, a disposition can be made active or inactive i.e., whether it can be displayed in the dialer page or not can be set

user:


pulse
PulseTekh
Dashboard
Monitoring
Telephony
Leads
Manual Reports
Progressive Reports
Predictive Reports
Agent Details
Upload Agent
Add
SHOW 10 ENTRIES
SEARCH:
S.NO
ACCESS CAMPAIGNS
USER GROUP
PHONE LOGIN
PHONE PASSWORD
USER NAME
PASSWORD
STATUS
ACTION
1
pro.manual.pre...test.
Agent
1000
Pulse@123
1000
Pulse@123
ACTIVE
2
pre.manual.pro.
Agent
1001
Pulse@123
1001
Pulse@123
ACTIVE
Showing 1 to 2 of 2 entries
Previous
1
Next

This page is mainly used for creating agent, teamleader and admin login. By selecting the ‘**Add**’ button, a modal pop up appears where for each there different tabs are provided. On clicking the respective tab, a particular users details can be entered and submitted. The same details can be uploaded in case of bulk users by selecting ‘**Upload Agent**’ button. The table displays the created users list which contains their campaign names, extension number, username, password, active/inactive status and **agent/admin/teamleader**. Note that a user can be mapped with multiple campaigns. The above mentioned details can be altered or deleted by clicking the edit/delete option under ‘**Action**’ column

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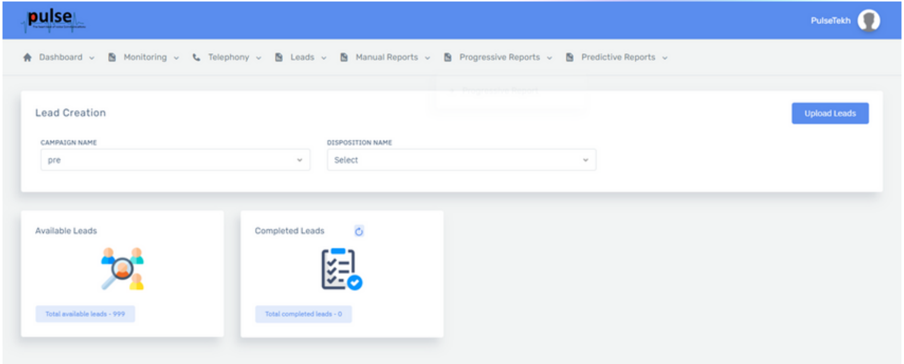
Leads :



- In this page, on clicking the 'Upload Leads' button a pop up will appear in which option is provided to browse files and upload it for respective campaign. CSV file format for lead details can be obtained by clicking top right corner profile icon->lead format 

- By using filter option, the respective campaign name or disposition can be filtered. Once filtered the available leads and completed leads for the respective campaign will appear as shown in the above picture. Under Available leads, the count of unused leads can be seen. Likewise under Completed leads, the count of used leads can be seen. In case if the leads are needed to be used again, the refresh button can be utilised to revert the leads back to available leads

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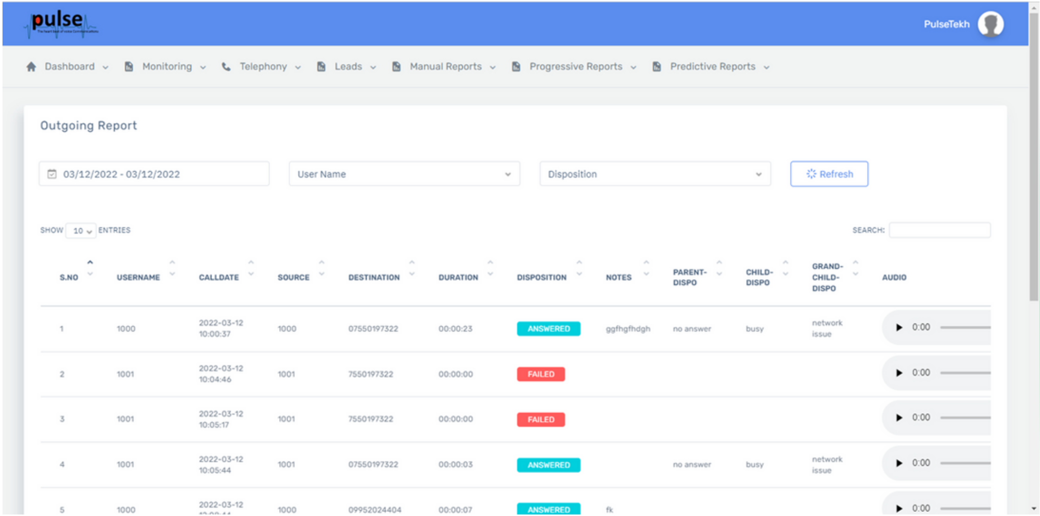
Manual Reports

Outgoing Reports:



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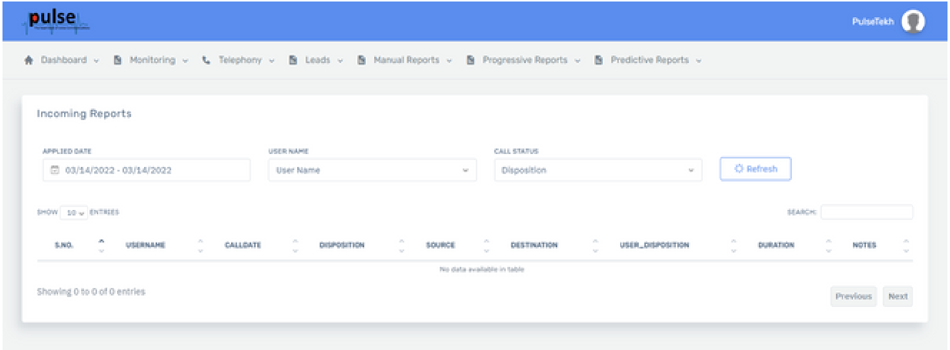
DISPOSITION
ANSWERED
FAILED
FAILED
ANSWERED
ANSWERED

The list of outgoing calls of every individual users will be listed here along with the call recording.

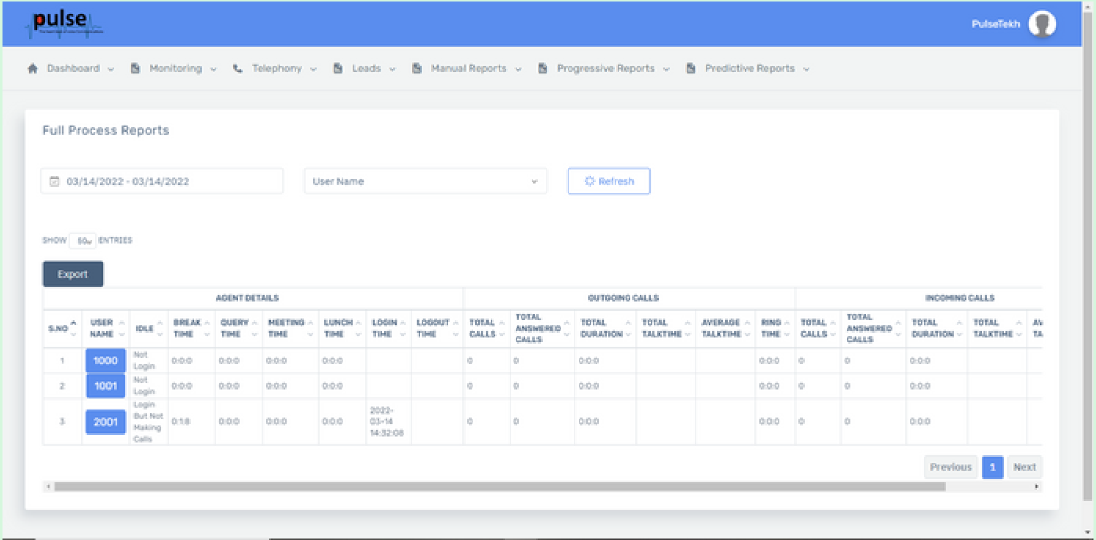
Apart from the report table, three filters are available to filter the details date wise, user wise and disposition wise

Incoming Report



The list of incoming calls of every individual users will be listed here along with the call recording.
Apart from the report table, three filters are available to filter the details date wise, user wise and disposition wise

Full process Report :



AGENT DETAILS									OUTGOING CALLS						INCOMING CALLS				
S.NO	USER NAME	IDLE	BREAK TIME	QUERY TIME	MEETING TIME	LUNCH TIME	LOGIN TIME	LOGOUT TIME	TOTAL CALLS	TOTAL ANSWERED CALLS	TOTAL DURATION	TOTAL TALKTIME	AVERAGE TALKTIME	RING TIME	TOTAL CALLS	TOTAL ANSWERED CALLS	TOTAL DURATION	TOTAL TALKTIME	AV TA
1	1000	Not Login	0:0:0	0:0:0	0:0:0	0:0:0			0	0	0:0:0			0:0:0	0	0	0:0:0		
2	1001	Not Login	0:0:0	0:0:0	0:0:0	0:0:0			0	0	0:0:0			0:0:0	0	0	0:0:0		
3	2001	Login But Not Making Calls	0:1:8	0:0:0	0:0:0	0:0:0	2022-03-14 14:32:08		0	0	0:0:0			0:0:0	0	0	0:0:0		

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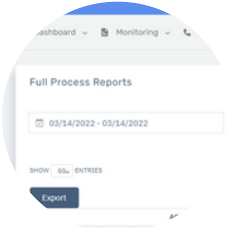
Full process report

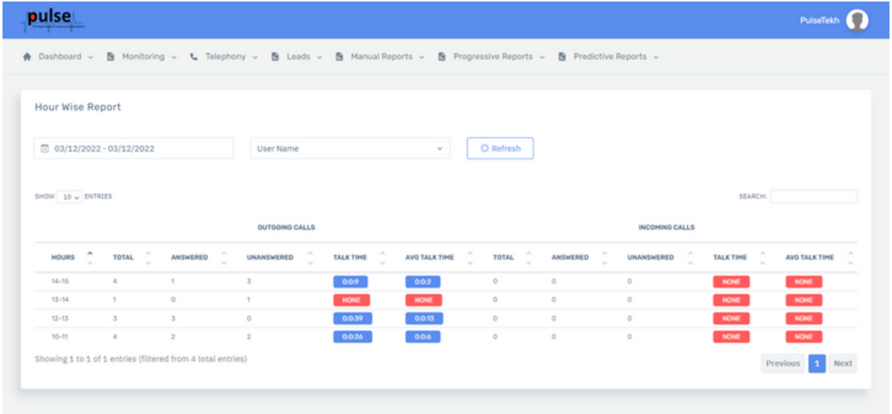
The list of outgoing and incoming calls of every individual users will be listed here along with their login details. Apart from the report table, two filters are available to filter the details date wise and user wise



Date wise reports

User wise Reports

Hour wise report :



The total list of outgoing and incoming calls of all users will be listed here for every one hour. Apart from the report table, two filters are available to filter the details date wise and user wise

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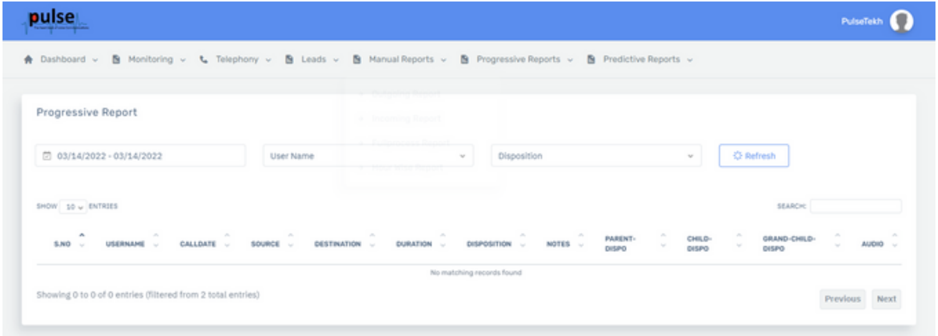
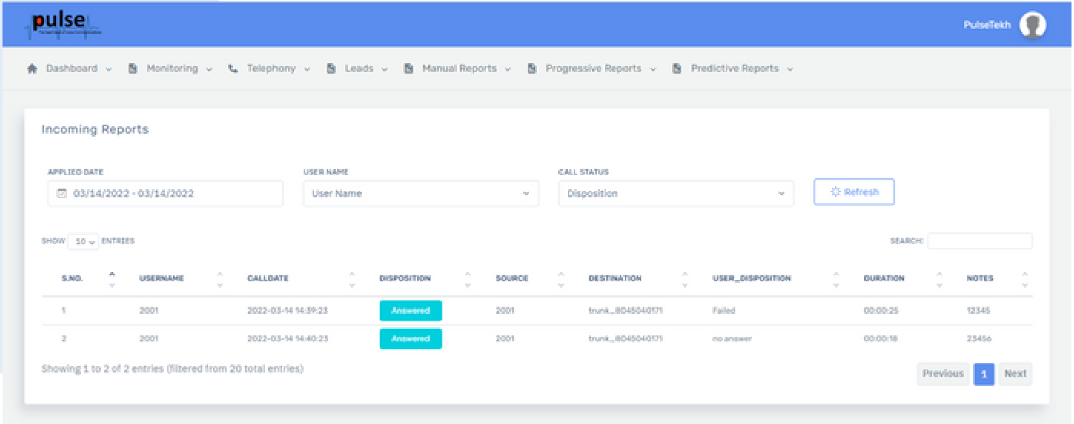
Progressive report



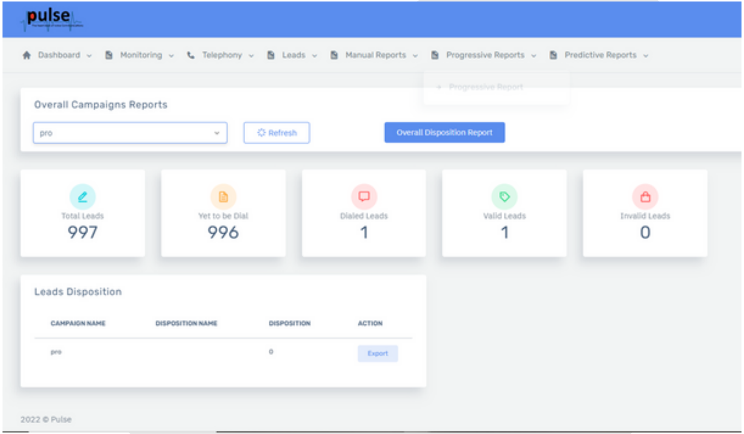
The list of incoming and outgoing calls of every individual users will be listed here along with the call recording. Apart from the report table, three filters are available to filter the details date wise, user wise and disposition wise



predictive report :

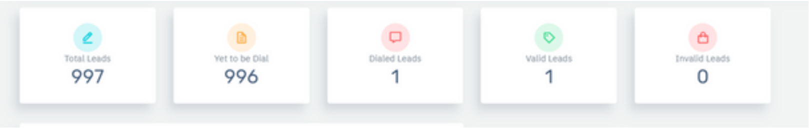
The list of incoming calls of every individual users will be listed here along with the call recording. Apart from the report table, three filters are available to filter the details date wise, user wise and disposition wise

Overall Campaign Reports:

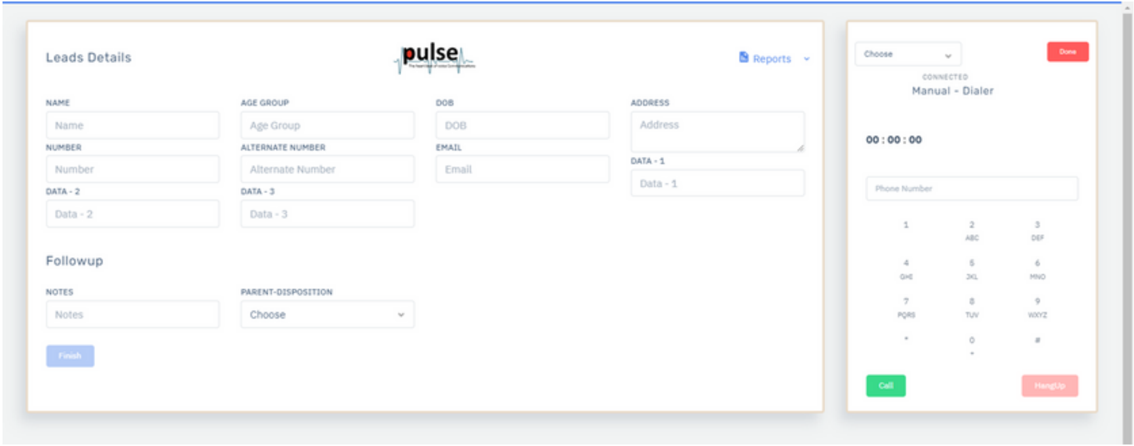


01 On clicking, Overall campaign report button a CSV file will get downloaded which contains the details regarding phone numbers and calls placed through which campaign

02 By selecting any campaign from the provided filter, the count of total leads, dialled leads, valid leads, yet to be dialled leads and invalid leads will appear. Below this, lead disposition table is provided and export button is provided to download a CSV file which may contain the respective campaign details including username and phone numbers



Agent manual :

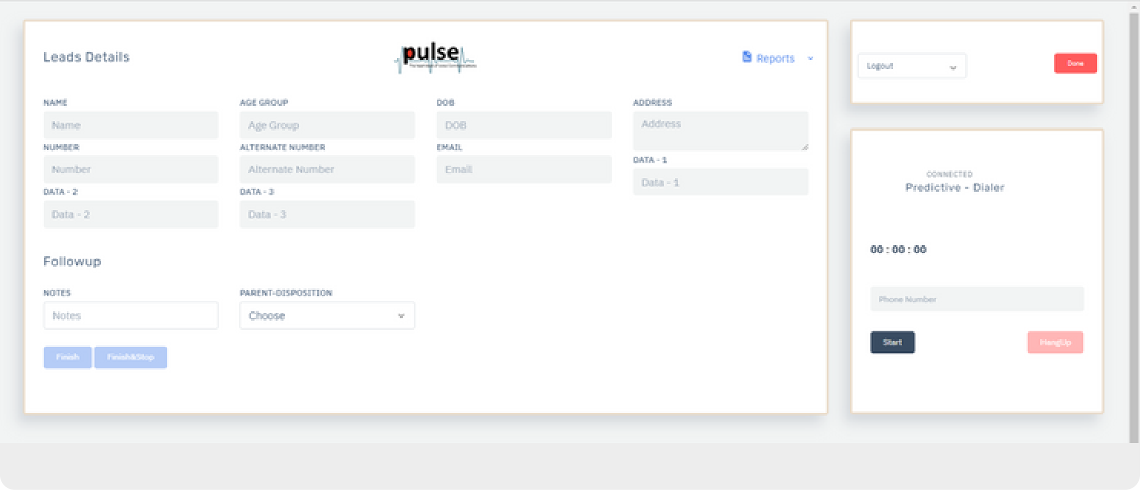


1 This page contains two sections, one is lead details and the other is dialler section. In the dialler section, a phone number can be entered and by clicking call button, the call will be initiated. While speaking to the lead, the agent can enter the details of that lead in the lead details section. After completing the call, the hang-up button can be used to end the call. Once after filling Notes and Disposition (if any) under lead details section, Finish button should be pressed so that the entered lead's details will be saved in the backend

2 The dialler section contains dial pad, timer, dropdown and done button. The dial pad is used to dial the phone number. When the call gets picked up by the lead, the timer will start running. Once the call gets hanged up the timer resets to zero. The dropdown contains various options such as Break, Lunch, Queries, and Meeting. The agent can use any of the options to go break instead of complete logout. Done button can be used once the agent is done for the day. After clicking done button, the agent cannot login again on the same day

3 In Lead details section, report option is provided on the right top corner to download the respective call reports such as CDR, Incoming and Call-back

Predictive :

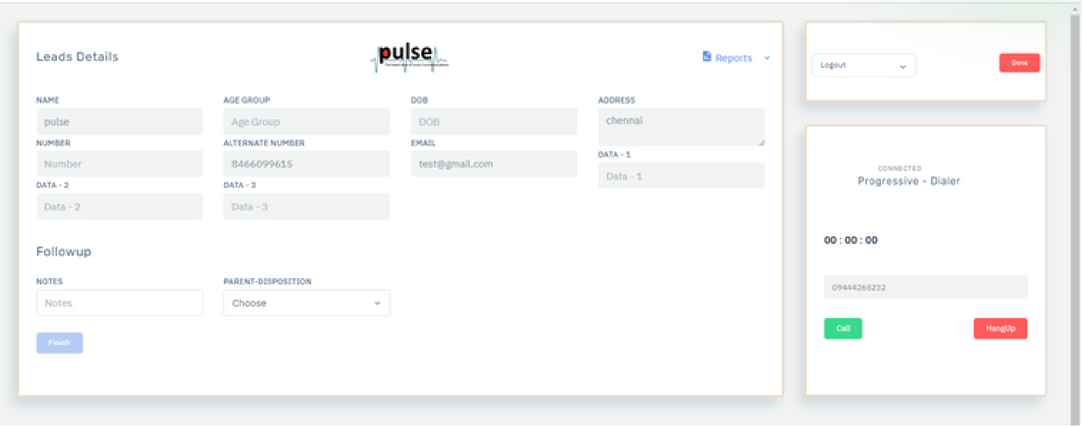

Leads Details
pulse
Reports
NAME
Name
AGE GROUP
Age Group
DOB
DOB
ADDRESS
Address
NUMBER
Number
ALTERNATE NUMBER
Alternate Number
EMAIL
Email
DATA - 1
Data - 1
DATA - 2
Data - 2
DATA - 3
Data - 3
Followup
NOTES
Notes
PARENT-DISPOSITION
Choose
Finish
Finish&Stop
Logout
Done
CONNECTED
Predictive - Dialer
00 : 00 : 00
Phone Number
Start
HangUp

Same as manual dialer, in predictive there are two sections such as lead details and dialer. Under dialer section, a start button, hang-up button, dropdown and done button is provided. Initially on clicking start button, a call will be triggered based on the ratio

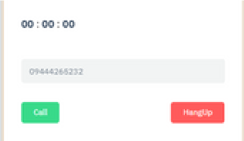
Say for example if the ratio is 2, then two calls will be triggered to two different leads. When any one call is attended then that mobile number will be displayed in the dialer section

Likewise, the details of that lead will automatically appear in the provided fields under the lead details section. Once the call is hanged up, Notes & Disposition should be entered and click Finish. After Finish button is selected, immediately the next call will get triggered. To stop call being triggered, Finish & Stop button should be used. Remaining options are same as Manual Dialer

Progressive report :



Progressive and Predictive are somewhat similar except the ratio level. Same as manual dialer, in progressive there are two sections such as lead details and dialer. Under dialer section, a call button, hang-up button, dropdown and done button is provided. Initially a mobile number and remaining details of the lead will appear in lead details section after login. On clicking call button, a call will be triggered to that number. After completing call, Notes and Disposition to be filled and click finish. Once clicked the next lead's details will appear. Click call button to initiate call. Remaining options are same as Manual Dialer



Team Leader

Dashboard

In this page, the live count of users **logged in, users in-call,** idle users and users in break will be displayed. Along with this, each individual users' name, extension number, state **(idle, in-call, ringing**), total calls and login/logout status is displayed. In addition to this, total leads, total SIP and total campaign is also displayed. Under the section '**Activity**', overall calls made out of which answered, missed and failed is also specified

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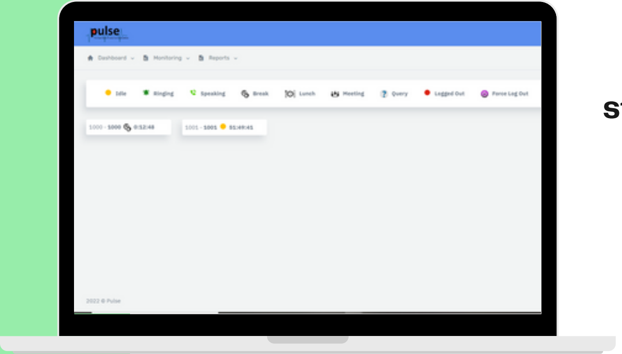

Monitoring

This page displays the live status of every individual user indicating their name and extension number

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Monitoring features

1 **Idle:** Indicates that a user is logged in and not performing any call activity Idle

2 **Ringing:** Indicates that the user is making call Ringing

3 **Speaking:** Indicates that the user made call get connected and is speaking Speaking

4 **Break:** Indicates that the user has gone for break Break

5 **Lunch:** Indicates that the user has gone for lunch Lunch

6 **Meeting:** Indicates that the user has gone for meeting Meeting

6 **Query:** Indicates that the user is having doubts and has gone to consult his higher authority

7 **Logged Out:** Indicates that user has logged out Logged Out

8 **Force Log Out:** Indicates that the user has left the session without proper log out. This occurs when the user by mistake closes the browser without clicking log out button. On clicking this option, the user's current session will be logged out and will be able to log in again into his account Force Log Out

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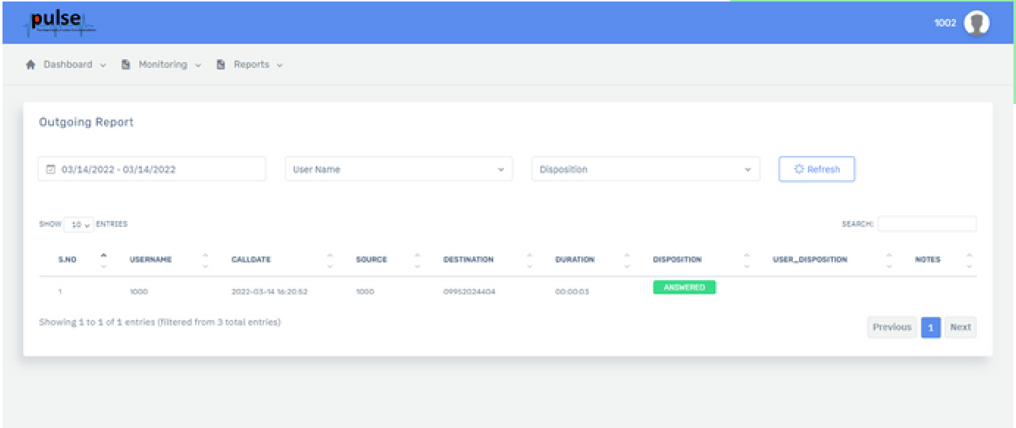
Reports

Outgoing Report

The list of outgoing calls of every individual users will be listed here along with the call recording. Apart from the report table, three filters are available to filter the details date wise, user wise and disposition wise



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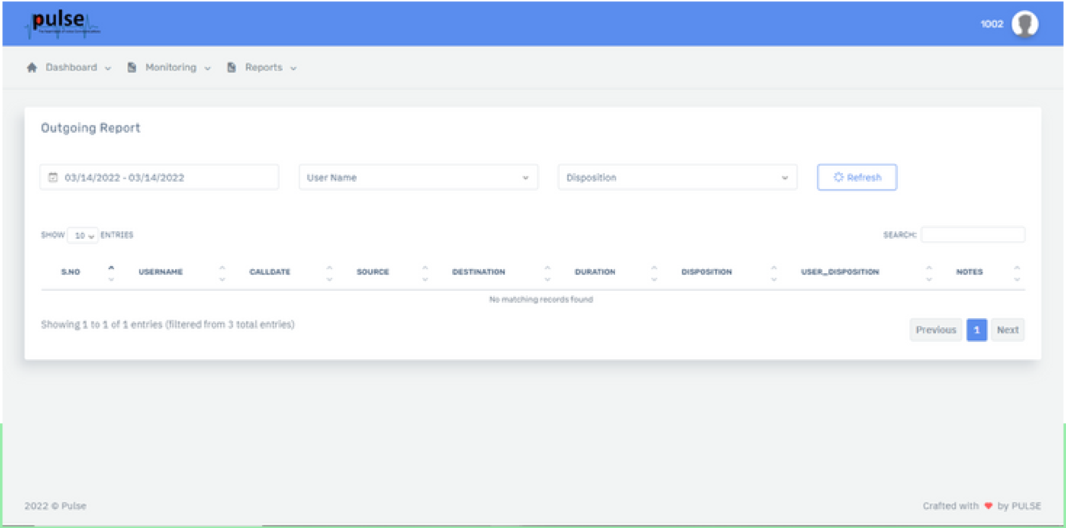
Incoming Report



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List of clients

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Pvt Ltd

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Thank you