I Spark Dataconnect PVT. LTD.

DIALDSK Software Manual

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Date _21-Dec-2015_

Modules Details

- Client Activation Module
- Agent Calling Module
- Client Operations Module
- Billing & Payments Module
- Mobile App
- DIALDESK Admin Module

❖ Client Activation Module

1.1 Company Registration

Name of Company ☐

Registered Office Address 1 ☐

Address 2 ☐

City ☐

State ☐

PIN Code ☐

Authorised Person Name (Director / Owner / Partner) ☐

Designation ☐

Number (Number Validation Required) ☐

Email (Mail ID Validation Required) ☐

Communication Address 1 ☐ Same as Above ☐

Address 2 ☐

City ☐

State ☐

PIN Code ☐

Contact Person Name 1 ☐

Designation ☐

Number (Number Validation Required) ☐

Email (Mail ID Validation Required) ☐

Contact Person Name 2

Designation

Number

Email

Contact Person Name 3

Designation

Number

Email

Note – Details for 1 contact person is mandatory & 2 optional

Upload Documentation (Mandate Image Upload Options)

Incorporation Certificate / Company Deed

PAN Card

Billing Address Prof

Authorized Person ID

Authorized Person Address Prof

Terms & Conditions

Note – Terms in hyperlink to read and mandate to agree

Welcome note to customer with company's login credentials for further actions

Case to be sent for DIALDESK Admin for

1.2 Choose Service Plan

Client needs to login with details sent to him at time of company creation

PLAN 1	PLAN 2	PLAN 3
---	---	---
---	---	---
BUY	BUY	BUT

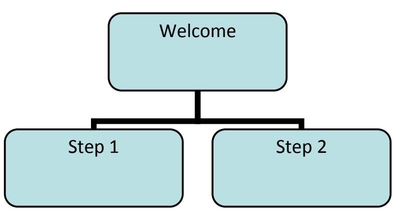
For Online Payment – Need to redirect to payment gateway

For Chq Payment – Need to capture chq details

After payment Confirmation mail with invoice needs to mail to customers mail id.

1.3 Process Integration

IVR Creation



Note – Client needs to write its IVR prompts

1.4 ECR Creation

Category	Type	Sub Type 1	Sub Type 2	Sub Type 3

Note – Client should have an option to create ECR up to 5 steps where only 2 steps should be mandatory

1.5 Capturing Fields Creation

Create Capturing Field
Field Header
Field Type (Text/Numeric/Etc.)
Next

Note – Client should have an option to create field with its required header name and type maximum up to 20.

1.6 Alert & Escalation Matrix

Basis on Type & Sup type created in ECR client should have an option to define SMS & Email alert

1.6 Close Looping Details

Select Type	Select SubType	Close Loop by System or Manual	Create System / Manual Category	Create System / Manual Sub Category

Note – Client should have an option to create able close looping details

1.7 Upload Existing Customer Base

Based on ECR & Field creation customer should have an option to upload existing customer base.

1.8 Training Details

Write or paste calling script in this box

Upload Training Content (MS Word / Excel / PPT / Image)

File 1

File 2

File 3

File 4

File 5

File 6

File 7

File 8

File 9

Note – Client should have option to upload his training content

1.9 Auto MIS & Report Matrix

Client should have an option to create Auto MIS & Report Matrix to his concerns through SMS & Email

1.10 Login Creation

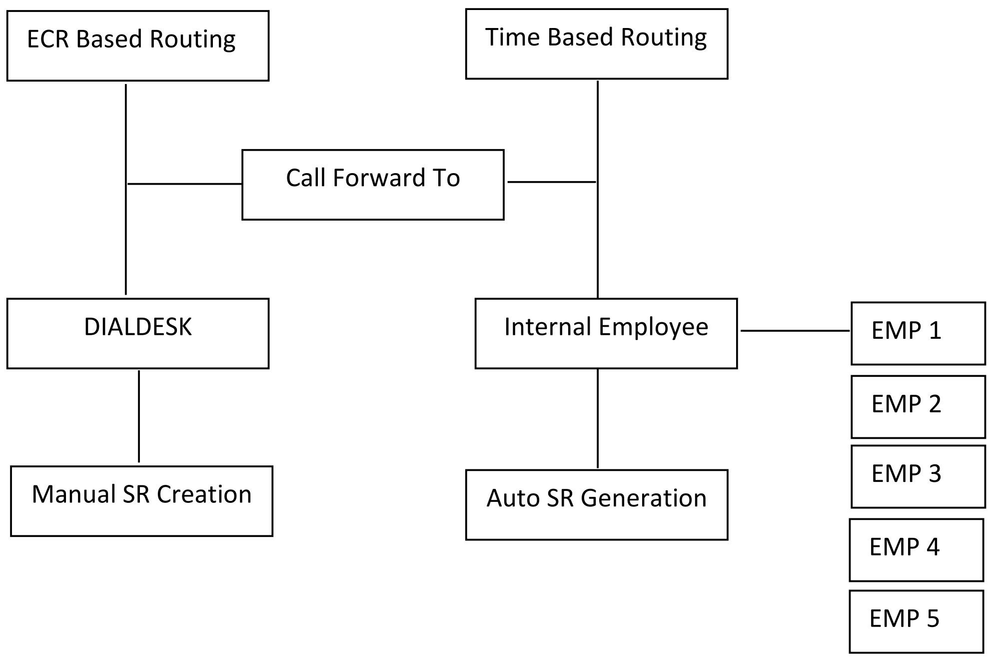
CREATE ID
Enter Name
Enter Number (Number Validation Required)
Enter Mail ID (Mail ID Validation Required)
Enter Designation

ASSIGN RIGHT

Thank You Mail to User with Password
CREATE NEXT

Note – Number of ID creation has to be linked with Service Price Plan

1.11 Work Flow Management



Note – Based on Time / ECR client should have an option to manage his work flow

1.12 Outbound Call Campaign Creation

Campaign name
Purpose of campaign
OB Calling Field creation (same as per above ECR creation)
OB SR Outcome creation
Import Data

❖ Agent Calling Screen

2.1 Inbound Calling Screen

Client Name & Customer Care Number
Language Selection & Incoming Number Detail
Capturing Field as per Client Activation Module
ECR as per Client Activation Module
Customer History / Transaction with search option
Caller Login Details (Live – Login Time / Hold / Talk / Pause)
Number of calls waiting
Shift Brief (Entered by TL to all agent)
DIALDESK Performer Details & Picture

2.2 Outbound Calling Screen

Client Name
Capturing Field as per Client Activation Module
ECR as per Client Activation Module
Customer History / Transaction with search option
Shift Brief (Entered by TL to all agent)
DIALDESK Performer Details & Picture

❖ DIALDESK Client Operations

3.1 Dashboard

Calling Performance	Process Performance
	Close looping Performance

Note – Client screen after login should be dashboard on above areas

3.2 SR Details

Client should have an option to show / export / update SR details date wise / type & subtype wise / closure status wise

3.3 SR Creation from Client End

Same as caller, client representative should also have rights to enter customer details at their end, we need to ensure to capture login details for same and it this should not add in billing.

3.4 MIS & Reports

Client should have option to export various reports and data date wise

- Date wise calling MIS
- Category wise MIS
- Type / Subtype MIS
- SR Status wise MIS
- Escalation based MIS

❖ Billing & Payments

4.1 My Account Dashboard – Real Time

Service Plan Name	XYZ	
Available	XXX	
Validity	XXX	
CONSUPTION	COUNT	AMOUNT
Call	XXX	XXX
SMS	XXX	XXX
Mail	XXX	XXX

My account page should show above dashboard real time.

4.2 Invoice & Payments

INVOICE	SHOW	DOWNLOAD	PAYMENT	SHOW	DOWNLOAD
Invoice 1	Show	Download	Receipt	Show	Download
Invoice 2	Show	Download	Receipt	Show	Download
Invoice 3	Show	Download	Receipt	Show	Download

4.3 Consumption Statement

Based on date customer can download its details account consumption statement.

4.4 Renewal & Plan Updation

PLAN DETAIL - - - -	
Renew Plan	Upgrade Plan
Recharge Account	

Note – Further on above mentioned actions; again we need to ask for online payment or chq payment and needs to follow same process as per activation – choose plan module.

- Mobile App

5.1 Dashboard

Operation Dashboard	My Account

Mobile app should have only two features as per above table which should be the replica of web app.

❖ DIALDESK Admin Module

6.1 Company Approval Bucket

Based on entered details by client, admin should have an option to accept and details company details.

In case of reject client needs to re-enter details considering rejection reason

In case of accept admin needs to assign customer care number and DID to client from number management system.

6.2 Client Process Integration

Admin should have access to backend of client process integration such as IVR tree, training details and work flow management to act further on client activation

6.3 Plan Master

Admin should option to create service price plan for all clients or client wise to show to their CRM.

6.4 Access to Client Operations Data

Admin should all access to client wise data and all updation rights to it.

6.5 SMS & Email Text Master

Admin should have complete control for sms & email text master for all clients & client specific

6.6 Billing & Payment Summary

Admin should have an export option for billing and payment summary client wise.