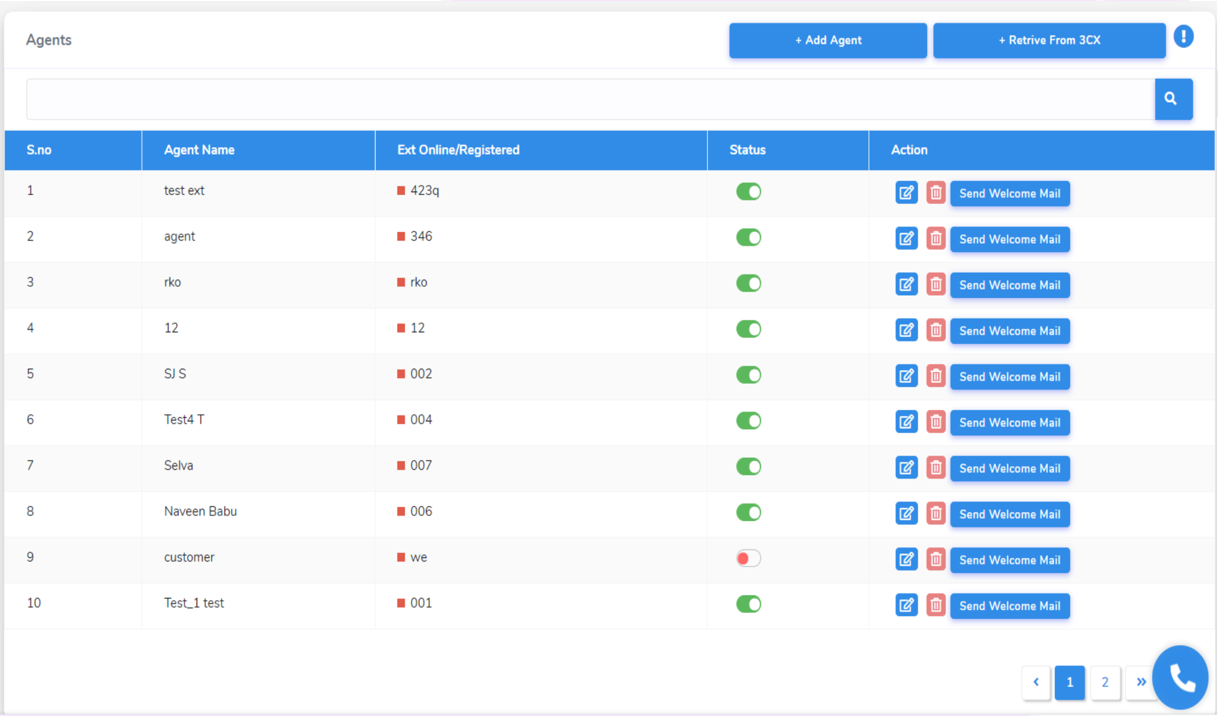
Help manual for Agents

Agents are the backbone of any Contact Center. They handle all types of customer requirements like inbound and outbound phone calls, sending and receiving sms text messages, live chats, support tickets, social media interactions and many other activities. The nature of the work may vary from simple tasks such as purchase enquiries to resolving complex complaints. They also handle a huge volume of exasperating enquiries.



How to add Agents?

- Click on **+Add Agent.**
- There will be a pop-up **"Add Agent".**
- Enter the name of the Agent in **Name.**
- Enter the Email ID of the Agent in **Email ID.**
- Enter the phone number of the Agent in **Phone Number.**
- Enter the user name of the Agent in **User Name.**
- Enter the user password of the Agent in **User Password.**
- Enter the extension/authentication number of the Agent in **ext/Auth.**
- Enter the SIP Username of the Agent in **SIP User Name.**

- Enter the SIP Password of the Agent in **SIP Password.**
- Select the type of **Report.**
- Assign the necessary permissions for the Agent by enabling them.
- Activate the status of the Agent by enabling the **Status.**
- Click on **Add Agent.**
- The Agent added now will get displayed in the Agent List.

How to retrieve Agents from 3CX?

- Go to **Manage** menu and click on **Agents** sub-menu.
- In the page that opens, click on **+Retrieve From 3CX.**
- There will be a pop-up "**Select Agents".**
- Click on the Agents that you need to select and click **Update**.
- The list of Agents selected will be displayed on Agent List.

How to Edit/Update Agent information?

- Go to the Agent List and click on the **EDIT** icon corresponding to the specific Agent.
- There will be a pop-out, "**Update Agent Details**".
- Carry out the changes that you need to make in **User Name, User Password, Name, ext/Auth, SIP User Name, SIP Password, Email ID and Phone Number.**
- You can also select another type of report from **Report.**
- You can change the path of the dialler in **"Go To Dialer".**
- Click **Update** and the changes will get updated and get displayed.

How to delete Agent?

- Click on the **Delete** icon corresponding to the specific Agent.
- There will be a pop-out asking for confirmation. Click on **"Yes, delete it!".**
- The Agent details will be deleted and it will not be in the list.

The View icon:

- You will find a view icon in **User Password** and **SIP Password** which helps you to view the user password and SIP password.

Retrieve SIP details from 3CX icon:

- This helps you to retrieve SIP data from 3CX.
- When you enter the extension number of the Agent the SIP username and SIP Password will be displayed.

Search:

- Make a quick search of the Agent by entering the Agent name in the search bar.

Send Welcome Mail:

You can send a Welcome Mail to the Agent newly added with the **Login details** of the Agent. Make Sure you entered correct Email Address for the Agent.

For Help:

Go to **Settings** menu and click on **App Settings** sub-menu. Scroll down to **Help Manual**.