

Personnel Management

Contents

| | |
|--|----|
| Scope:..... | 2 |
| Access:..... | 2 |
| General Rules:..... | 3 |
| Features:..... | 4 |
| Personnel Management View | 5 |
| Add Personnel..... | 8 |
| Export Function | 17 |
| Merge Function..... | 20 |
| Editing Personnel..... | 23 |
| Removing Personnel from the lists | 26 |
| Copying Staff Lists – Advanced Feature | 29 |
| When Creating a New Campaign | 29 |
| Copy Staff Lists to an Existing Campaign | 30 |

Personnel Manager

Scope:

Create a table to capture (role) hierarchy information, that will be used to populate the agent, team leader and manager lists.

This input table will generate a unique id, that will allow for changes (spelling, ect) to be made without disrupting the data already captured.

The employee id is to better identify and control the person lists for the client and allow for name changes and updates.

It also includes an email and employee id input function.

The email address is for future development that will allow the agent to give feedback via email to the app.

Access:

(until new admin permissions are implemented)

Dev Admin

System Admin

Client Admin

IA Admin

View:

000043

Unique ID

Abednego

Name *

Naidoo

Surname *

Enter Email

Email

Enter Employee ID

Employee ID

17-Oct-2018

Start Date *

10-06-2020

Last Edit Date

☒ Agent

☐ Team Leader

☐ Manager

ENABLED

Save

Cancel

Campaigns

Search:

| ID | Description | Select All |
|----|-------------------------------|-------------------------------------|
| 2 | Insurance Client Care AQA | <input checked="" type="checkbox"/> |
| 3 | Insurance Sales AQA | <input type="checkbox"/> |
| 12 | Insurance Collections AQA | <input type="checkbox"/> |
| 13 | Insurance Retentions AQA | <input type="checkbox"/> |

Showing 1 to 4 of 4 entries

General Rules:

- Input fields ie. Name, Surname, Email and Employee ID are limited to 50 characters.
- All special characters are allowed in the above fields, excluding quotations characters.
- The 26 letters of the alphabet are allowed in the name and surname fields. Also included are accents such as â, è, ê, ö or ú.
- Numbers are allowed in the name and surname field. We do not recommend using numbers when creating users.
- Only one role per user, per customer (db) can be assigned per person.
- The systems will only allow for one unique Name Surname combination, ie you can't have two or more people named Jo Soap. Such names should be individualized with a middle name / initial / nickname.

Features:

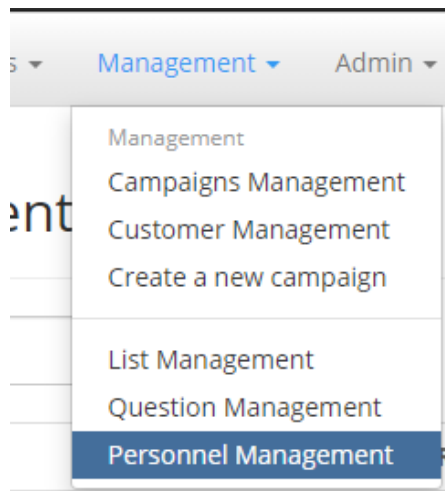
- A unique id will be allocated to each new person automatically
- Email and Employee id are non-compulsory
- Person can be allocated (assigned) to multiple campaigns per customer (db)
- Person can be disabled from list (which will remove them from their respective list, but not reporting.)
- Where name changes were done in the past, resulting in data being split, agent names can now be merged and combining the data.

Future enhancements to be spec:

- Allowing the client access to decide whether non-compulsory fields need to be made compulsory. (Per customer / db)
- Enabling the agent to add feedback via an email loop

Personnel Management View

The Personnel Management will be accessible via the Management Menu.



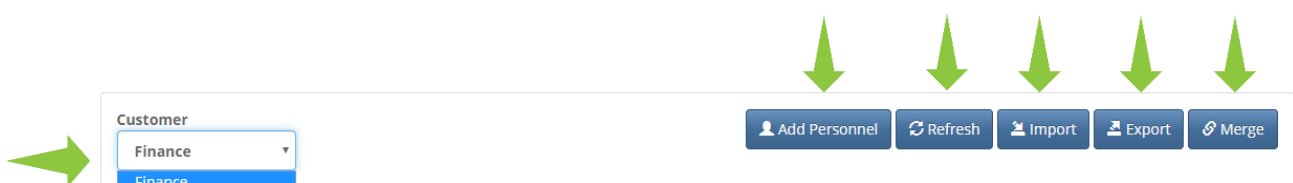
There are 2 views available as well a menu.

Views:

1. Personnel – shows individual personnel details
2. Campaigns – shows campaign details

Menu:

1. Customer – Will display all databases linked to the clients' app
2. Add Personnel – add single individuals' data
3. Refresh – Reloads page
4. Import – this is for bulk staff imports into a specific campaign
5. Export – allows for exporting of staff data to a .csv file from a specific campaign
6. Merge – allows for the data for two separate individuals to be consolidated. This is to resolve cases resulting from the previous list management tool. Cases resulting from names changes or spelling errors.



Personnel View: Shows the basic detail per individual personnel in a table format including:

1. Name
2. Surname
3. Email
4. Employee ID
5. Role (Agent, Team Leader or Manager)
6. Active (Enabled or Not)

Clicking on either the name or surname (blue script) or selecting the pencil on the right hand side of the table will allow you to edit the selected person.

There is also a delete icon on the right hand side of the table, however you will only be able to delete a person if there are no captures associated to that person.

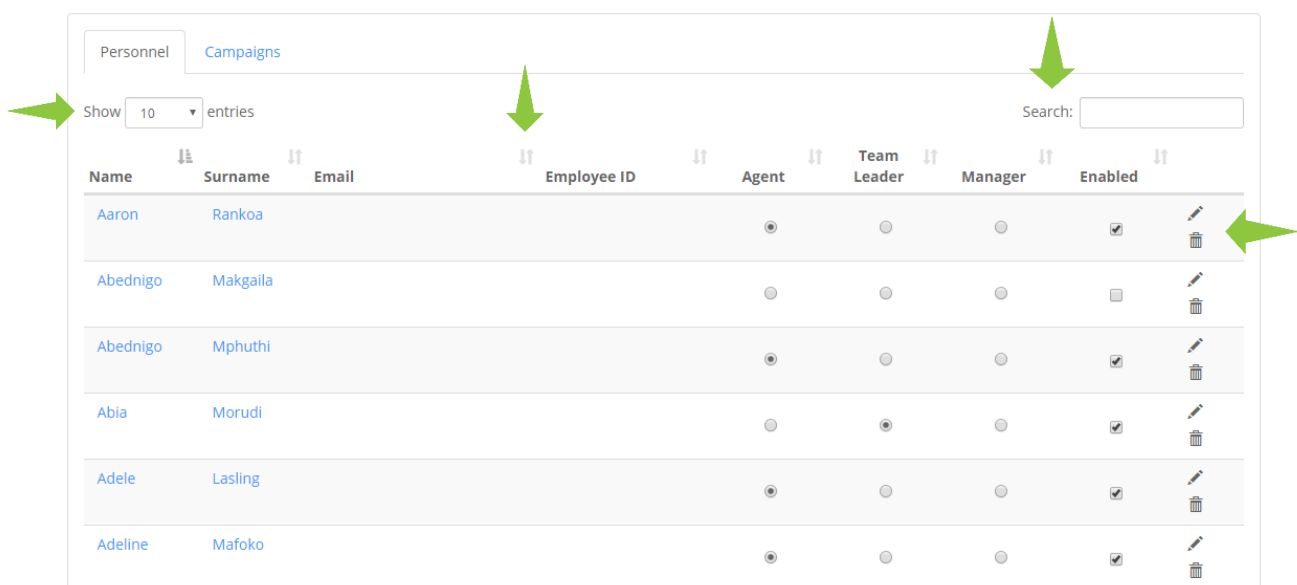
If there are captures you can remove the person from the lists by disabling that person.













All columns are sortable using the icon located on the right hand side of the headings on the table.

There is a Search option in the top right hand corner to narrow the entries in the table.

There is also a Show option in the top left hand corner to increase the entries on the table.

This is limited to a selection of 10, 20, 50 or 100 entries.



| Name | Surname | Email | Employee ID | Agent | Team Leader | Manager | Enabled | |
|----------|----------|-------|-------------|----------------------------------|----------------------------------|-----------------------|-------------------------------------|---|
| Aaron | Rankoa | | | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> |   |
| Abednigo | Makgaila | | | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |   |
| Abednigo | Mphuthi | | | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> |   |
| Abia | Morudi | | | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> |   |
| Adele | Lasling | | | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> |   |
| Adeline | Mafoko | | | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> |   |

Campaigns View: Shows the basic detail per campaign in a table format including:

1. Campaign ID
2. Campaign Name
3. Number of active persons per role (Agents, Team Leader and Managers)
4. Active lists (Agents, Team Leader and Managers)

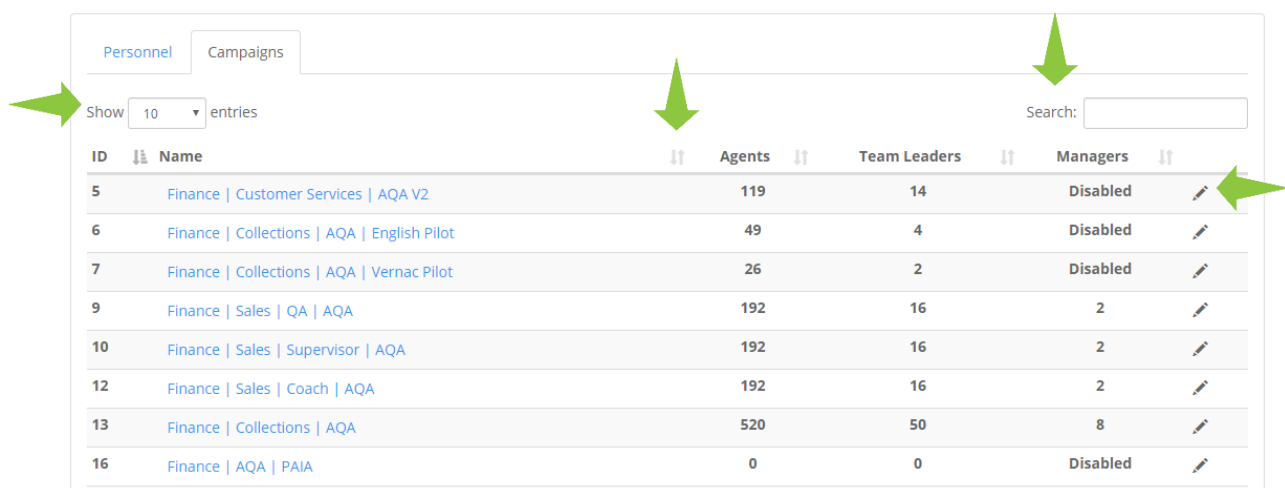
Clicking on the campaign name (blue script) or selecting the pencil on the right hand side of the table will allow you to edit the selected campaign. This is adding or removing staff from the selected campaign.

All columns are sortable using the icon located on the right hand side of the headings on the table.

There is a Search option in the top right hand corner to narrow the entries in the table.

There is also a Show option in the top left hand corner to increase the entries on the table.

This is limited to a selection of 10, 20, 50 or 100 entries.



The screenshot shows the 'Campaigns' tab in the interface. At the top left, there is a 'Show' dropdown menu set to '10' entries. At the top right, there is a 'Search:' input field. The table below has columns for 'ID', 'Name', 'Agents', 'Team Leaders', and 'Managers'. Each column header has a double arrow icon for sorting. The 'Name' column contains blue script links for each campaign. The 'Managers' column contains a 'Disabled' status and a pencil icon for editing. Green arrows point to the 'Show' dropdown, the search bar, the double arrow icons on the column headers, and the pencil icon in the 'Managers' column.

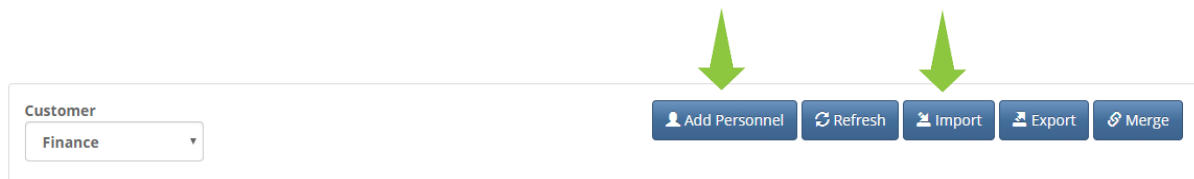
| ID | Name | Agents | Team Leaders | Managers |
|----|---|--------|--------------|----------|
| 5 | Finance Customer Services AQA V2 | 119 | 14 | Disabled |
| 6 | Finance Collections AQA English Pilot | 49 | 4 | Disabled |
| 7 | Finance Collections AQA Vernac Pilot | 26 | 2 | Disabled |
| 9 | Finance Sales QA AQA | 192 | 16 | 2 |
| 10 | Finance Sales Supervisor AQA | 192 | 16 | 2 |
| 12 | Finance Sales Coach AQA | 192 | 16 | 2 |
| 13 | Finance Collections AQA | 520 | 50 | 8 |
| 16 | Finance AQA PAIA | 0 | 0 | Disabled |

Add Personnel

Adding personnel can be done in two ways

1. Individual personnel can be added
2. Bulk updates can be done

Both function are accessible using the menu in the Personnel Management



Adding Individual Personnel

Select the Add Personnel button.

A side window will pop-up.

Name and Surname fields are compulsory. When they are empty as in the screen shot below, they will be encircled by red to indicate this condition.

The Employee ID is you company's allocated ID and not the unique id that will be allocated for this system.

Start date can be amended at this point.

However the Last Edit Date is auto populated.

The screenshot shows the 'Add Personnel' side window. It has a 'Customer' dropdown set to 'Finance'. Below it are input fields for 'Enter Name' (labeled 'Name *'), 'Enter Surname' (labeled 'Surname *'), 'Enter Email' (labeled 'Email'), 'Enter Employee ID' (labeled 'Employee ID'), '30-Mar-2020' (labeled 'Start Date *'), '30-03-2020' (labeled 'Last Edit Date'), and radio buttons for 'Agent', 'Team Leader', and 'Manager'. At the bottom is an 'ENABLED' toggle switch. To the right is a 'Campaigns' table with columns 'ID', 'Description', and 'Select All'.

| ID | Description | Select All |
|----|---|--------------------------|
| 5 | Finance Customer Services AQA V2 | <input type="checkbox"/> |
| 6 | Finance Collections AQA English Pilot | <input type="checkbox"/> |
| 7 | Finance Collections AQA Vernac Pilot | <input type="checkbox"/> |
| 9 | Finance Sales QA AQA | <input type="checkbox"/> |
| 10 | Finance Sales Supervisor AQA | <input type="checkbox"/> |
| 12 | Finance Sales Coach AQA | <input type="checkbox"/> |
| 13 | Finance Collections AQA | <input type="checkbox"/> |
| 16 | Finance AQA PAIA | <input type="checkbox"/> |
| 17 | Training Finance Collections Debi-Check | <input type="checkbox"/> |
| 19 | Finance Customer Services CX Insights V1 | <input type="checkbox"/> |

Below is a capture that will not be allowed to save.

Here the red encircled boxes indicate where the errors lie.

I have highlighted in yellow the errors in the example below

1. "é" is not allowed in the Email boxes, but will be allowed in the Name and Surname boxes.
2. "/" is not allowed in the Employee ID box (note hyphen "-" is allowed)

Add Personnel

Cloé

Name *

Rosenhof

Surname *

CloéR@acompany.com

Email

4277456/546

Employee ID

01-Jan-2020

Start Date *

30-03-2020

Last Edit Date

☒ Agent
☐ Team Leader
☐ Manager

ENABLED

Campaigns

| ID | Description | Select All |
|----|---|-------------------------------------|
| 5 | Finance Customer Services AQA V2 | <input type="checkbox"/> |
| 6 | Finance Collections AQA English Pilot | <input checked="" type="checkbox"/> |
| 7 | Finance Collections AQA Vernac Pilot | <input checked="" type="checkbox"/> |
| 9 | Finance Sales QA AQA | <input type="checkbox"/> |
| 10 | Finance Sales Supervisor AQA | <input type="checkbox"/> |
| 12 | Finance Sales Coach AQA | <input type="checkbox"/> |
| 13 | Finance Collections AQA | <input checked="" type="checkbox"/> |
| 16 | Finance AQA PAIA | <input type="checkbox"/> |
| 17 | Training Finance Collections Debi-Check | <input type="checkbox"/> |
| 19 | Finance Customer Services CX Insights V1 | <input type="checkbox"/> |

The Save button will also not be available until the errors are corrected.

☒ Agent
☐ Team Leader
☐ Manager

ENABLED

Save

Cancel

You will be able to update

1. The Start Date
2. The Role (Agent, Team leader or Manager)
3. Enable (on the occasion when you want to do a creation but the person should not be on list immediately)
4. Allocate this person to single or multiple campaigns

Once the errors have been corrected the Save button will enabled.

Name *

Surname *

Email

Employee ID

Start Date *

Last Edit Date

☒ Agent
☐ Team Leader
☐ Manager

☒ ENABLED

Campaigns

| ID | Description | Select All |
|----|---|-------------------------------------|
| 5 | Finance Customer Services AQA V2 | <input type="checkbox"/> |
| 6 | Finance Collections AQA English Pilot | <input checked="" type="checkbox"/> |
| 7 | Finance Collections AQA Vernac Pilot | <input checked="" type="checkbox"/> |
| 9 | Finance Sales QA AQA | <input type="checkbox"/> |
| 10 | Finance Sales Supervisor AQA | <input type="checkbox"/> |
| 12 | Finance Sales Coach AQA | <input type="checkbox"/> |
| 13 | Finance Collections AQA | <input checked="" type="checkbox"/> |
| 16 | Finance AQA PAIA | <input type="checkbox"/> |
| 17 | Training Finance Collections Debi-Check | <input type="checkbox"/> |
| 19 | Finance Customer Services CX Insights V1 | <input type="checkbox"/> |

Once saved you will get a notification banner on the main screen and the person will be added to the Personnel table.

Added Cloe Rosenhof

Personnel Management

Customer

Personnel
Campaigns

Show
10
entries

Search:
cl

| Name | Surname | Email | Employee ID | Agent | Team Leader | Manager | Enabled | |
|------------|----------|--------------------|-------------|----------------------------------|----------------------------------|-----------------------|-------------------------------------|--|
| Claudia | Malatji | | | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |
| Clementine | Letsie | | | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |
| Cloe | Rosenhof | CloeR@acompany.com | 4277456-546 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |

Showing 1 to 3 of 3 entries (filtered from 950 total entries)

Previous
1
Next

Bulk updates

adding a group of people

Ensure that your pc regional settings are set to English (United Kingdom) to ensure that the export displays correctly.

Select the Import button.

The following side window will pop-up.

Import CSV ×


Download the CSV Template below, save the file, and use Excel or any text editing application to add your personnel info. Then come back to this screen to upload your file and import the data into Personnel Management. If you would like to assign these personnel to a specific campaign, you may select the campaign from the table below.

1. [Download the CSV template.](#)

2. Update the template with personnel data.

3. Select the campaign(s) to assign to these personnel. (Optional)

Search:

| Select  | ID  | Campaign | Agents  | Team Leaders  | Managers  |
|---|---|---|---|--|---|
| <input type="checkbox"/> | 5 | Finance Customer Services AQA V2 | 118 | 14 | 0 |
| <input type="checkbox"/> | 6 | Finance Collections AQA English Pilot | 50 | 4 | 0 |
| <input type="checkbox"/> | 7 | Finance Collections AQA Vernac Pilot | 27 | 2 | 0 |
| <input type="checkbox"/> | 9 | Finance Sales QA AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 10 | Finance Sales Supervisor AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 12 | Finance Sales Coach AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 13 | Finance Collections AQA | 521 | 50 | 8 |
| <input type="checkbox"/> | 16 | Finance AQA PAIA | 0 | 0 | 0 |
| <input type="checkbox"/> | 17 | Training Finance Collections Debi-Check | 520 | 48 | 8 |

Download and save the CSV template provided.

| FileHomeInsertPage LayoutFormulasDataReviewViewHelp | | | | | | | | | | | Share | Comments |
|---|------|---------|----------------------------|---------------------------|-------------------------|--------------------|--------------------------|----------------------|----------------------|--|-------|----------|
| E20 | | | | | | | | | | | | |
| | A | B | C | D | E | F | G | H | I | | | |
| 1 | Name | Surname | Employee ID (alphanumeric) | Email (email@example.com) | Start Date (dd/mm/yyyy) | Agent (True/False) | Team Leader (True/False) | Manager (True/False) | Enabled (True/False) | | | |
| 2 | | | | | | | | | | | | |

The following columns will be found on this template.

1. Name
2. Surname
3. Employee ID (alphanumeric)
4. Email (email@example.com)
5. Start Date (dd/mm/yyyy)
6. Agent (True/False)
7. Team Leader (True/False)
8. Manager (True/False)
9. Enabled (True/False)

The same rules apply to bulk update that are applied to individual updates.

Below is an example of what your file should look like.

Note the error in row A9

| | A | B | C | D | E | F | G | H | I | J |
|----|----------|---------|-------------|---------------------------|-------------------------|--------------------|--------------------------|----------------------|----------------------|---|
| 1 | Name | Surname | Employee ID | Email (email@example.com) | Start Date (dd/mm/yyyy) | Agent (True/False) | Team Leader (True/False) | Manager (True/False) | Enabled (True/False) | |
| 2 | Brian | Toms | 48420916 | TomsB@company.com | 01/12/2019 | FALSE | TRUE | FALSE | TRUE | |
| 3 | Lulu | Letsi | 42102641 | LetsiL@company.com | 01/11/2019 | FALSE | FALSE | TRUE | TRUE | |
| 4 | Joe | Soap | 66947424 | SoapJ@company.com | 25/11/2019 | TRUE | FALSE | FALSE | TRUE | |
| 5 | John | Smith | 94129054 | SmithJ@company.com | 03/06/2019 | TRUE | FALSE | FALSE | TRUE | |
| 6 | Tembi | George | 61264055 | GeorgeT@company.com | 03/06/2019 | TRUE | FALSE | FALSE | TRUE | |
| 7 | Lee-Anne | Smith | 71438140 | SmithL@company.com | 01/11/2019 | TRUE | FALSE | FALSE | TRUE | |
| 8 | Adele | Mafoko | 20623545 | MafokoA@company.com | 25/11/2019 | TRUE | FALSE | FALSE | TRUE | |
| 9 | Agnes | Phama | 41554778 | Phama.A@company.com | 01/12/2019 | TRUE | FALSE | FALSE | TRUE | |
| 10 | | | | | | | | | | |

Ensure that you last 4 columns are correctly filled in.

In the example, your first entry happens to be a team-leader, the second entry is a manager and the rest of the list are agents.

The order you put your staff in doesn't matter as long as your allocations of TRUE/FALSE are correct.

Once you have saved the file go back to the Import button and scroll down on the side pop-up to Choose File.

| Select | ID | Campaign | Agents | Team Leaders | Managers |
|--------------------------|----|---|--------|--------------|----------|
| <input type="checkbox"/> | 5 | Finance Customer Services AQA V2 | 118 | 14 | 0 |
| <input type="checkbox"/> | 6 | Finance Collections AQA English Pilot | 50 | 4 | 0 |
| <input type="checkbox"/> | 7 | Finance Collections AQA Vernac Pilot | 27 | 2 | 0 |
| <input type="checkbox"/> | 9 | Finance Sales QA AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 10 | Finance Sales Supervisor AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 12 | Finance Sales Coach AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 13 | Finance Collections AQA | 521 | 50 | 8 |
| <input type="checkbox"/> | 16 | Finance AQA PAIA | 0 | 0 | 0 |
| <input type="checkbox"/> | 17 | Training Finance Collections Debi-Check | 520 | 48 | 8 |
| <input type="checkbox"/> | 19 | Finance Customer Services CX Insights V1 | 2 | 0 | 0 |

Showing 1 to 10 of 10 entries

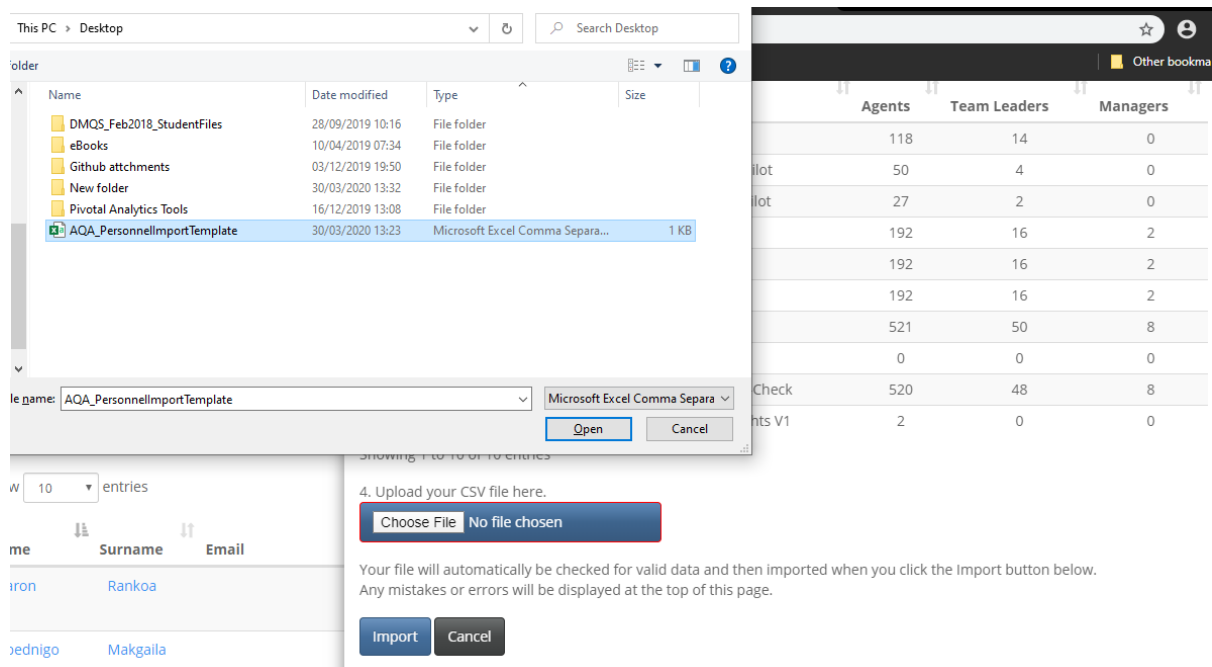
4. Upload your CSV file here.



Your file will automatically be checked for valid data and then imported when you click the Import button below. Any mistakes or errors will be displayed at the top of this page.



Browse to the location you have saved the file and select Open.



You will see your file name next Choose File

Select Import

| | | | | | |
|--------------------------|----|---|-----|----|---|
| <input type="checkbox"/> | 9 | Finance Sales QA AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 10 | Finance Sales Supervisor AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 12 | Finance Sales Coach AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 13 | Finance Collections AQA | 521 | 50 | 8 |
| <input type="checkbox"/> | 16 | Finance AQA PAIA | 0 | 0 | 0 |
| <input type="checkbox"/> | 17 | Training Finance Collections Debi-Check | 520 | 48 | 8 |
| <input type="checkbox"/> | 19 | Finance Customer Services CX Insights V1 | 2 | 0 | 0 |

Showing 1 to 10 of 10 entries

4. Upload your CSV file here.

AQA_Personn...emplate.csv

Your file will automatically be checked for valid data and then imported when you click the Import button below.
Any mistakes or errors will be displayed at the top of this page.

Because of the error we left in A9 you will see the following notification appear at the top of the pop up.

Import CSV
×

File Invalid: AQA_PersonnellImportTemplate.csv
- Line 9: These characters are not allowed in the Name field: "\$"

Download the CSV Template below, save the file, and use Excel or any text editing application to add your personnel info. Then come back to this screen to upload your file and import the data into Personnel Management. If you would like to assign these personnel to a specific campaign, you may select the campaign from the table below.

1. [Download the CSV template.](#)
2. Update the template with personnel data.
3. Select the campaign(s) to assign to these personnel. (Optional)

Search:

Your file name will also no longer show next to Choose File and the default of No file chosen will show.

So if you see the default of No file chosen, scroll to the top to see what you need to alter.

Once you have corrected and saved the file, you can follow the import option again.

You will get the following notification if you are successful.

Import Successful!

Personnel Management

Customer

Finance

Add Personnel
Refresh
Import
Export
Merge

In this example we did not allocate these staff members to campaign.

However, if they are all to be allocated to the same campaign or multiple campaign you can select the applicable campaigns before selecting the import button.

Your staff will now show in the Personnel table view.

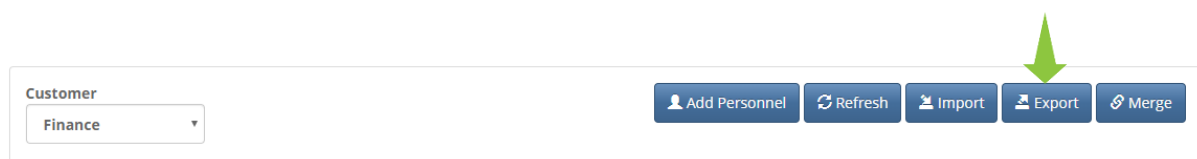
| Name | Surname | Email | Employee ID | Agent | Team Leader | Manager | Enabled | |
|----------|----------|---------------------|-------------|----------------------------------|----------------------------------|----------------------------------|-------------------------------------|--|
| Brian | Toms | TomsB@company.com | 48420916 | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |
| Joe | Soap | SoapJ@company.com | 66947424 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |
| Lee-Anne | Smith | SmithL@company.com | 71438140 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |
| John | Smith | SmithJ@company.com | 94129054 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |
| Agnes | Phama | Phama.A@company.com | 41554778 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |
| Adele | Mafoko | MafokoA@company.com | 20623545 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |
| Lulu | Letsi | LetsiL@company.com | 42102641 | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="checkbox"/> | |
| Tembi | George | GeorgeT@company.com | 61264055 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |
| Cloe | Rosenhof | CloeR@acompany.com | 4277456-546 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |
| Aaron | Rankoa | | | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | |

Export Function

This function will allow you to export personnel information from one or multiple campaigns to a CSV file, for review.

Note although the resulting file shares characteristics of the import file you will not be able to use it to make bulk updates / edits, by changing data and then importing the file.

On the personnel menu select Export.



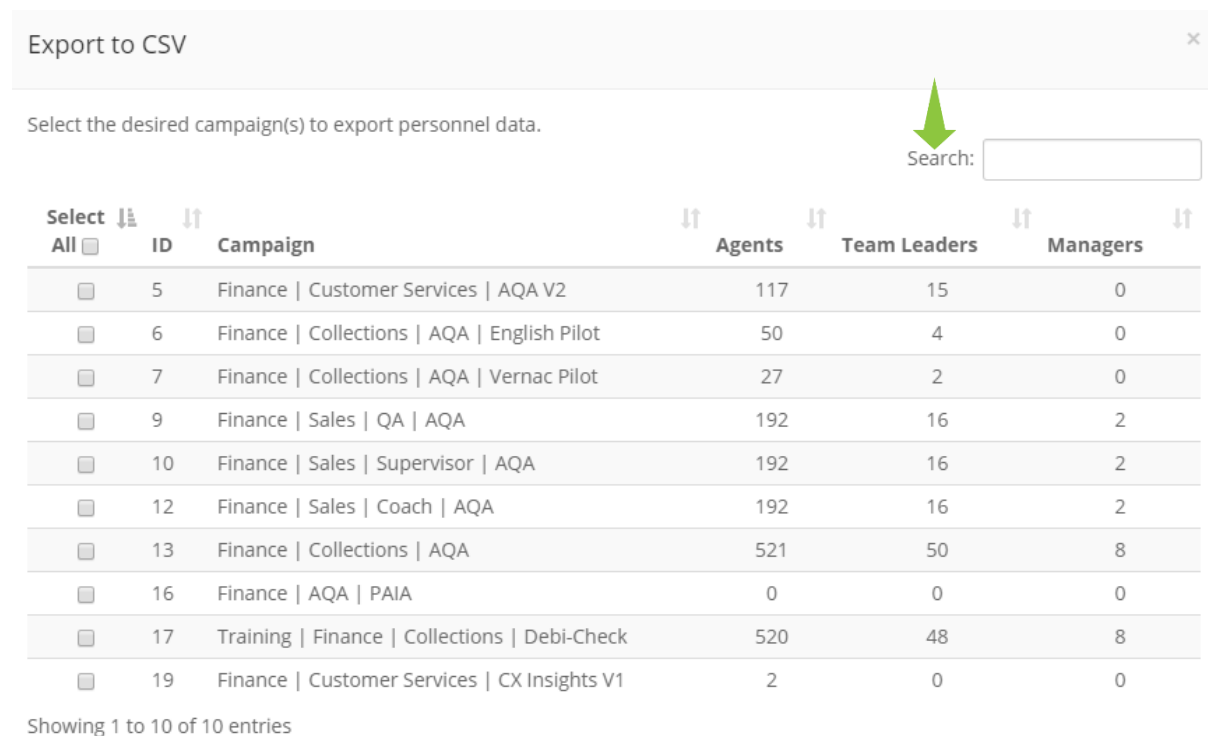
Customer: Finance

Buttons: Add Personnel, Refresh, Import, **Export**, Merge

The following side menu will pop-up with the campaigns associated with that customer database.

Note that the Export button is not available and will remain so until you have selected your campaigns.

You can use the search box to narrow down your campaign entry options.



Export to CSV

Select the desired campaign(s) to export personnel data.

Search:

| Select | ID | Campaign | Agents | Team Leaders | Managers |
|--------------------------|----|---|--------|--------------|----------|
| <input type="checkbox"/> | 5 | Finance Customer Services AQA V2 | 117 | 15 | 0 |
| <input type="checkbox"/> | 6 | Finance Collections AQA English Pilot | 50 | 4 | 0 |
| <input type="checkbox"/> | 7 | Finance Collections AQA Vernac Pilot | 27 | 2 | 0 |
| <input type="checkbox"/> | 9 | Finance Sales QA AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 10 | Finance Sales Supervisor AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 12 | Finance Sales Coach AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 13 | Finance Collections AQA | 521 | 50 | 8 |
| <input type="checkbox"/> | 16 | Finance AQA PAIA | 0 | 0 | 0 |
| <input type="checkbox"/> | 17 | Training Finance Collections Debi-Check | 520 | 48 | 8 |
| <input type="checkbox"/> | 19 | Finance Customer Services CX Insights V1 | 2 | 0 | 0 |

Showing 1 to 10 of 10 entries



Export Cancel

Once you have made your selection, click on the enabled Export button.

Export to CSV

Select the desired campaign(s) to export personnel data.

Search:

| Select | ID | Campaign | Agents | Team Leaders | Managers |
|-------------------------------------|----|---|--------|--------------|----------|
| <input type="checkbox"/> | 5 | Finance Customer Services AQA V2 | 117 | 15 | 0 |
| <input checked="" type="checkbox"/> | 6 | Finance Collections AQA English Pilot | 50 | 4 | 0 |
| <input checked="" type="checkbox"/> | 7 | Finance Collections AQA Vernac Pilot | 27 | 2 | 0 |
| <input type="checkbox"/> | 9 | Finance Sales QA AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 10 | Finance Sales Supervisor AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 12 | Finance Sales Coach AQA | 192 | 16 | 2 |
| <input type="checkbox"/> | 13 | Finance Collections AQA | 521 | 50 | 8 |
| <input type="checkbox"/> | 16 | Finance AQA PAIA | 0 | 0 | 0 |
| <input type="checkbox"/> | 17 | Training Finance Collections Debi-Check | 520 | 48 | 8 |
| <input type="checkbox"/> | 19 | Finance Customer Services CX Insights V1 | 2 | 0 | 0 |

Showing 1 to 10 of 10 entries

Export

Cancel

The resulting CSV file will look like this, a filled in version of the import file with the additional colour of Unique ID (A).

| | A | B | C | D | E | F | G | H | I | J | K |
|----|-----------|------------|---------------|----------|-------|------------------|------------------|-------|-----------|---------|---------|
| 1 | Unique ID | Name | Surname | Employee | Email | Start Date | Last Edit Date | Agent | Team Lead | Manager | Enabled |
| 2 | 11 | Abia | Morudi | | | 13/02/2019 00:00 | 26/03/2020 00:00 | FALSE | TRUE | FALSE | TRUE |
| 3 | 12 | Adesh | Jadoo | | | 12/02/2019 00:00 | 26/03/2020 00:00 | FALSE | TRUE | FALSE | TRUE |
| 4 | 16 | Brenda | Vorster | | | 12/02/2019 00:00 | 26/03/2020 00:00 | FALSE | TRUE | FALSE | TRUE |
| 5 | 22 | Emily | Mohapi | | | 01/07/2019 00:00 | 26/03/2020 00:00 | FALSE | TRUE | FALSE | TRUE |
| 6 | 56 | Tsundzuka | Maluleke | | | 13/02/2019 00:00 | 26/03/2020 00:00 | FALSE | TRUE | FALSE | TRUE |
| 7 | 230 | Angeline | Makgato | | | 13/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 8 | 236 | Aphelele | Vusani | | | 04/06/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 9 | 260 | Cebisile | Mdaki | | | 14/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 10 | 276 | Daniel | Manala | | | 12/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 11 | 292 | Dorothy | Tsotetsi | | | 19/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 12 | 307 | Ellen | Malapile | | | 12/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 13 | 309 | Elmon | Khosa | | | 12/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 14 | 313 | Emmanuel | Monyai | | | 12/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 15 | 314 | Emmanuel | Nxumalo | | | 12/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 16 | 322 | Fanele | Themba | | | 12/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 17 | 329 | Gertrude | Chokoe | | | 12/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 18 | 344 | Grace | Motloheloa | | | 15/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 19 | 345 | Granny | Phahlamohlaka | | | 12/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 20 | 356 | Itumeleng | Tabane | | | 26/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 21 | 368 | Jeanette | Lenkoe | | | 12/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 22 | 371 | Joseph | Manemela | | | 14/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 23 | 385 | Keitumetsi | Mothlala | | | 15/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 24 | 400 | Khotso | Sello | | | 13/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 25 | 423 | Lindiwe | Thomo | | | 14/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 26 | 433 | Lydia | Sekharume | | | 20/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 27 | 437 | Mahlatse | Maleswena | | | 05/04/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 28 | 441 | Mante | Tompane | | | 15/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |
| 29 | 445 | Maria | Molekwa | | | 12/02/2019 00:00 | 26/03/2020 00:00 | TRUE | FALSE | FALSE | TRUE |

There are a few things to note in this export:

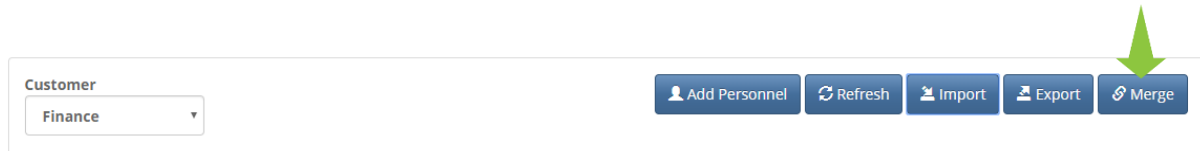
1. This is a consolidated view of both the campaigns I've selected. Therefore agents on both campaigns will only show once.
2. No campaign allocations will show here.
3. The list is sorted by Unique ID.

As noted above if you make changes to this file and try to do a bulk update you will get a error notification.

Merge Function

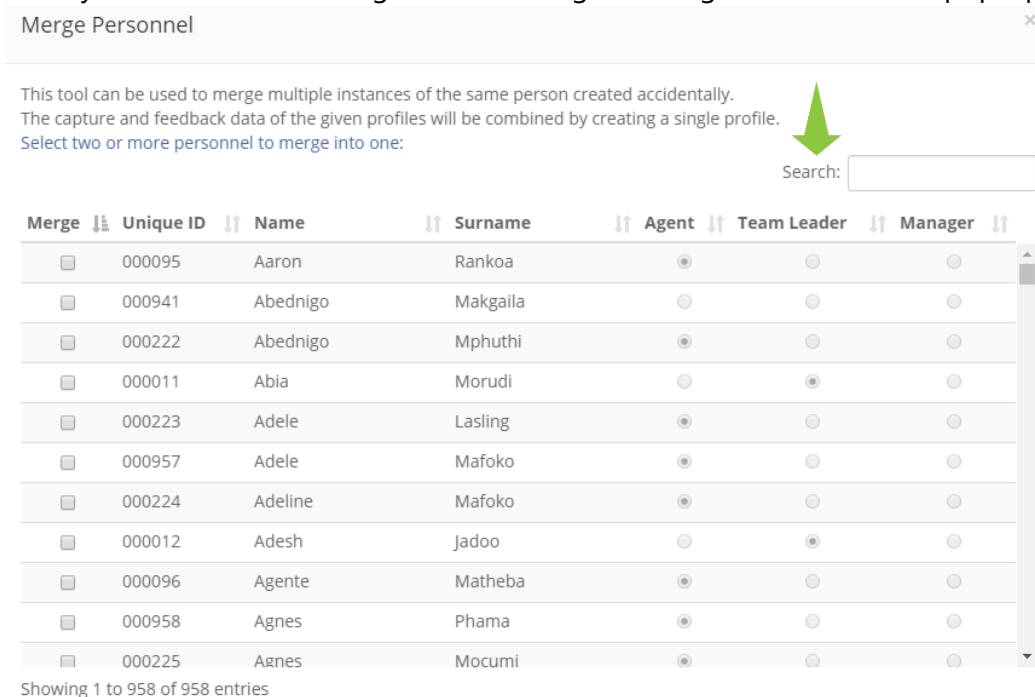
This function allows you to combine the data of two personnel in the event where one person was created twice.

Example: with the previous list management system, name changes (surname updates) resulted in the data being distributed between the two names depending on the the time of the name update.



A screenshot of the top navigation bar. On the left, there is a 'Customer' dropdown menu with 'Finance' selected. To the right of the dropdown are five buttons: 'Add Personnel', 'Refresh', 'Import', 'Export', and 'Merge'. A green arrow points to the 'Merge' button.

Once you have selected Merge, the following following side window will pop-up



A screenshot of the 'Merge Personnel' side window. At the top, there is a title bar with a close button. Below the title bar, there is a text block explaining the tool's purpose: 'This tool can be used to merge multiple instances of the same person created accidentally. The capture and feedback data of the given profiles will be combined by creating a single profile. Select two or more personnel to merge into one:'. Below this text is a 'Search:' input field. A green arrow points to the search field. Below the search field is a table with the following columns: 'Merge', 'Unique ID', 'Name', 'Surname', 'Agent', 'Team Leader', and 'Manager'. The table contains 10 rows of data. A green arrow points to the 'Merge' column header. Below the table, there is a text block that says 'Showing 1 to 958 of 958 entries'.


| Merge | Unique ID | Name | Surname | Agent | Team Leader | Manager |
|--------------------------|-----------|----------|----------|----------------------------------|----------------------------------|-----------------------|
| <input type="checkbox"/> | 000095 | Aaron | Rankoa | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000941 | Abednigo | Makgaila | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000222 | Abednigo | Mphuthi | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000011 | Abia | Morudi | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000223 | Adele | Lasling | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000957 | Adele | Mafoko | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000224 | Adeline | Mafoko | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000012 | Adesh | Jadoo | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000096 | Agente | Matheba | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000958 | Agnes | Phama | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000225 | Agnes | Mocumi | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Showing 1 to 958 of 958 entries

☐ I understand that merging the selected profiles will combine their respective capture and feedback data across all campaigns.

Lets say Mpho got married and wanted her name updated on the app prior to People Manager.

Because we implimented this change she now shows up as 2 separate people on all reports, Mpho Polori and Mpho Ngobeni.



| | | | | | | | | | |
|-------------------|----|---|---------|---------|---------|---------|---------|----|---|
| Karabo Mokobane | 21 | 1 | 95.2 % | 100.0 % | 95.2 % | 100.0 % | 100.0 % | 1 | 0 |
| Mpho Ngobeni | 5 | 1 | 80.0 % | 100.0 % | 80.0 % | 100.0 % | 100.0 % | 5 | 0 |
| Mpho Polori | 24 | 5 | 79.2 % | 95.8 % | 79.2 % | 100.0 % | 100.0 % | 16 | 0 |
| Ndodenhle Dlamini | 25 | 0 | 100.0 % | 100.0 % | 100.0 % | 100.0 % | 100.0 % | 20 | 0 |

We can now combine the data under one name using the merge function.

We use the search function to reduce the list.

Add ticks to the agents we wish to merge and read the fine print before selecting merge.

Merge Personnel


This tool can be used to merge multiple instances of the same person created accidentally. The capture and feedback data of the given profiles will be combined by creating a single profile. Select two or more personnel to merge into one:

Search:



| Merge | Unique ID | Name | Surname | Agent | Team Leader | Manager |
|-------------------------------------|-----------|-----------|-----------|-----------------------|-----------------------|-----------------------|
| <input type="checkbox"/> | 000665 | Dimpho | Kodisang | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000152 | Mamphoto | Ramahlo | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000482 | Mpho | Letakgomo | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000752 | Mpho | Matshaba | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000753 | Mpho | Moeketsi | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input checked="" type="checkbox"/> | 000163 | Mpho | Ngobeni | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input checked="" type="checkbox"/> | 000164 | Mpho | Polori | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="checkbox"/> | 000483 | Mpho Ruth | Thipe | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Showing 1 to 8 of 8 entries (filtered from 958 total entries)



☒ I understand that merging the selected profiles will combine their respective capture and feedback data across all campaigns.

Merge

Cancel



The app will allocated the name associated with the lowest unique id and the following confirmation will appear.

Merge Successful!
Full Name: Mpho Ngobeni

All reports will now show Mpho with a consolidated data set.

| | | | | | | | | | |
|---------------|------|-----|---------|---------|---------|---------|---------|------|----|
| Mmasello Badi | 24 | 7 | 70.8 % | 100.0 % | 70.8 % | 100.0 % | 100.0 % | 0 | 0 |
| Morongoa | 21 | 1 | 95.2 % | 100.0 % | 95.2 % | 100.0 % | 100.0 % | 1 | 0 |
| Karabo | | | | | | | | | |
| Mokobane | | | | | | | | | |
| Mpho Ngobeni | 29 | 6 | 79.3 % | 96.6 % | 79.3 % | 100.0 % | 100.0 % | 21 | 0 |
| Ndodenhle | | | | | | | | | |
| Dlamini | 25 | 0 | 100.0 % | 100.0 % | 100.0 % | 100.0 % | 100.0 % | 20 | 0 |
| Nomonde Zwane | 23 | 5 | 78.3 % | 95.7 % | 78.3 % | 100.0 % | 100.0 % | 13 | 2 |
| Nompumelelo | | | | | | | | | |
| Magwaza | 24 | 1 | 95.8 % | 100.0 % | 95.8 % | 100.0 % | 100.0 % | 1 | 0 |
| Total | 2286 | 362 | 84.2 % | 96.2 % | 86.5 % | 99.2 % | 97.7 % | 1004 | 74 |

If this is not Mpho's correct new name, this can be updated using the edit function, detailed below.

Editing Personnel

You can edit your personnel information by accessing the edit view a few ways.

By clicking the Name, Surname or the pencil icon of the required person you wish to update.

Personnel

Campaigns

Show

10

entries

Search:

| Name | Surname | Email | Employee ID | Agent | Team Leader | Manager | Enabled | |
|----------|---------|--------------------|-------------|----------------------------------|----------------------------------|-----------------------|-------------------------------------|-----------------------------------|
| Brian | Toms | TomsB@company.com | 48420916 | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | <div><div></div><div></div></div> |
| Joe | Soap | SoapJ@company.com | 66947424 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | <div><div></div><div></div></div> |
| Lee-Anne | Smith | SmithL@company.com | 71438140 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | <div><div></div><div></div></div> |
| John | Smith | SmithJ@company.com | 94129054 | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="checkbox"/> | <div><div></div><div></div></div> |

The greyed out areas can't be changed, however the rest can be updated.

Edit Personnel Details

000951

Unique ID

Brian

Name *

Toms

Surname *

TomsB@company.com

Email

48420916

Employee ID

01-Dec-2019

Start Date *

30-03-2020

Last Edit Date

☐ Agent

☒ Team Leader

☐ Manager

ENABLED

Save

Cancel

Campaigns

| ID | Description | Select All |
|----|---|--------------------------|
| 5 | Finance Customer Services AQA V2 | <input type="checkbox"/> |
| 6 | Finance Collections AQA English Pilot | <input type="checkbox"/> |
| 7 | Finance Collections AQA Vernac Pilot | <input type="checkbox"/> |
| 9 | Finance Sales QA AQA | <input type="checkbox"/> |
| 10 | Finance Sales Supervisor AQA | <input type="checkbox"/> |
| 12 | Finance Sales Coach AQA | <input type="checkbox"/> |
| 13 | Finance Collections AQA | <input type="checkbox"/> |
| 16 | Finance AQA PAIA | <input type="checkbox"/> |
| 17 | Training Finance Collections Debi-Check | <input type="checkbox"/> |
| 19 | Finance Customer Services CX Insights V1 | <input type="checkbox"/> |

Roles, campaign allocations, spelling mistakes can all be updated in this view.

In this example we are updating Brian's Surname and Email.

And adding him to the Customer Services Campaign.

You will get a notification once the update is successful.

Updated Brian Tomms

Personnel Management

Customer
Finance

Add Personnel Refresh Import Export Merge

Below is the view the Team Leader list on Customer Services prior to allocated Brian to this campaign.

Analytical - Interaction Analytics

Campaign: Finance | Customer Services

ConnectionID:

User ID: a

Date:

Call Details Question

Captured Reason:

Collection Date:

Agent ID:

Service Line:

Team Leader:

Duration:

Repeat Call:

Mandatory Entry
Kgomotso Sebata
Koketso Pine
Lerato Thema
Lesego Gaanagomo
Linda Nkosi
Mantwa Ngobese
Pyarvra Maharaj
Rolivhuwa Sibadela
Sophia Mosebi
Thabang Maponya
Thembu Mnguni
Vacant
Vallery Tladinyane
Vanashree Deokumar
Zandile Mabanga

Mandatory Entry

Minutes Seconds

Mandatory Entry

After

Analytical - Interaction Analytics

| | | | |
|------------------------|----------|--------------------|-------|
| Campaign: Finance Cu | | Mandatory Entry | Use |
| ConnectionID: | | Brian Tomms | Date: |
| | | Kgomotso Sebata | |
| | | Koketso Pine | |
| | | Lerato Thema | |
| | | Lesego Gaanakgomo | |
| | | Linda Nkosi | |
| | | Mantwa Ngobese | |
| | | Pyarvra Maharaj | |
| | | Rolivhuwa Sibadela | |
| | | Sophia Mosebi | |
| | | Thabang Maponya | |
| | | Vacant | |
| | | Vallery Tladinyane | |
| | | Vanashree Deokumar | |
| | | Zandile Mabanga | |
| Call Details | Question | Mandatory Entry | |
| Captured Reason: | | | |
| Collection Date: | | | |
| Agent ID: | | | |
| Service Line: | | | |
| Team Leader: | | | |
| Duration: | Minutes | Seconds | |
| Repeat Call: | | Mandatory Entry | |

Removing Personnel from the lists

There are two ways to remove personnel from the lists.

1. Disabling the personnel (Recommended)
2. Deleting the personnel – this can only be done if there is no data linked to this person.

You can do both from the Personnel table view.

Lets remove Fisiwe Thwala from the agent list on Customer Services

Analytical - In

Campaign: Finance | Cu

ConnectionID:

Call Details Question

Captured Reason:

Collection Date:

Agent ID: Fisiwe Thwala

Service Line: Mandatory Entry

Team Leader: Mandatory Entry

Duration: Minutes Seconds

Repeat Call: Mandatory Entry

User ID: admin

Date:

Ditaelo Byang
Doreen Phooko
Duduzile Dlamlenze
Edwin Phokane
Emma Nephembani
Engred Thavhana
Fisiwe Thwala
Foster Khosa
Germinah Matsimela
Gullit Magaribi
Hannes Barties
Jabulile Mnguni
Jeffrey Ndou
Jeffrey Raseng
Jeffrey Moshoka
Juliet Malogadihlare


We've searched for them using the search function on the Personnel Table.

We can take them off the list by removing the tick in the Enabled column.

Personnel Campaigns

Show 10 entries

Search: Fisiwe Thwala

| Name | Surname | Email | Employee ID | Agent | Team Leader | Manager | Enabled | |
|--------|---------|-------|-------------|-------|-------------|---------|-------------------------------------|---|
| Fisiwe | Thwala | | | | | | <input checked="" type="checkbox"/> |  |

Showing 1 to 1 of 1 entries (filtered from 958 total entries)

Previous 1 Next

We can also attempt to remove them from the list using the trash can (Remove) icon on the table.

However because this person has captures you will get the following notification

Remove Personnel ×

Are you sure you want to remove this person?

| | |
|---------------------|---------------|
| Name | Fisiwe Thwala |
| Unique ID | 119 |
| EmployeeID | |
| EmailAddress | |
| Roles | Agent |

This user cannot be deleted while there are assessments linked to them.
Disable this user?

Disable
Cancel

This option will however allow you to Disable the person.

You will be able to view the person on the table, but there will no longer be a tick in the Enabled box and the person will not be on the list.

Person Removed

Personnel Management

Customer
Finance
Add Personnel Refresh Import Export Merge

Personnel Campaigns

Show 10 entries
Search: fisi

| Name | Surname | Email | Employee ID | Agent | Team Leader | Manager | Enabled |
|--------|---------|-------|-------------|-------|-------------|---------|---------|
| Fisiwe | Thwala | | | | | | |

Showing 1 to 1 of 1 entries (filtered from 958 total entries)
Previous 1 Next

After

Analytical - In

Campaign: Finance | Cu

ConnectionID:

User ID:

Date:

Call Details Question

Captured Reason:

Collection Date:

Agent ID:

Service Line:

Team Leader:

Duration:

Repeat Call:

Dineo Mawela
 Dineo Shale
 Ditaello Byang
 Doreen Phooko
 Duduzile Dlamlenze
 Edwin Phokane
 Emma Nephembani
 Engred Thavhana
Foster Khosa
 Germinah Matsimela
 Gullit Magaribi
 Hannes Barties
 Jabulile Mnguni
 Jeffrey Ndou
 Jeffrey Raseng
 Jeffrey Moshoka

Note: As mentioned previously, this action will updated the list but any data captured will still be viewable on the reports.

Filter

Start Call Date : 01-Jul-2019 | End Call Date : 30-Sep-2019

Service Lines [Export to CSV](#)

| Service Line | Total Assessments | Total Criteria not met | Pass Rate | Pass % Resolution & Satisfaction | Pass % Business Efficiency | Pass % Regulatory Compliance | Pass % Voice of the Customer | Completed Coaching | Coaching in Progress |
|-------------------|-------------------|------------------------|---------------|----------------------------------|----------------------------|------------------------------|------------------------------|--------------------|----------------------|
| Customer Services | 26 | 1 | 96.2 % | 100.0 % | 96.2 % | 100.0 % | 100.0 % | 19 | 0 |
| Total | 26 | 1 | 96.2 % | 100.0 % | 96.2 % | 100.0 % | 100.0 % | 19 | 0 |

Team Leaders [Export to CSV](#)

| Team Leader | Total Assessments | Total Criteria not met | Pass Rate | Pass % Resolution & Satisfaction | Pass % Business Efficiency | Pass % Regulatory Compliance | Pass % Voice of the Customer | Completed Coaching | Coaching in Progress |
|-----------------|-------------------|------------------------|---------------|----------------------------------|----------------------------|------------------------------|------------------------------|--------------------|----------------------|
| Vacant | 1 | 0 | 100.0 % | 100.0 % | 100.0 % | 100.0 % | 100.0 % | 0 | 0 |
| Zandile Mabanga | 25 | 1 | 96.0 % | 100.0 % | 96.0 % | 100.0 % | 100.0 % | 19 | 0 |
| Total | 26 | 1 | 96.2 % | 100.0 % | 96.2 % | 100.0 % | 100.0 % | 19 | 0 |

Agents [Export to CSV](#)

| Agent ID | Total Assessments | Total Criteria not met | Pass Rate | Pass % Resolution & Satisfaction | Pass % Business Efficiency | Pass % Regulatory Compliance | Pass % Voice of the Customer | Completed Coaching | Coaching in Progress |
|---------------|-------------------|------------------------|---------------|----------------------------------|----------------------------|------------------------------|------------------------------|--------------------|----------------------|
| Fisiwe Thwala | 26 | 1 | 96.2 % | 100.0 % | 96.2 % | 100.0 % | 100.0 % | 19 | 0 |
| Total | 26 | 1 | 96.2 % | 100.0 % | 96.2 % | 100.0 % | 100.0 % | 19 | 0 |

Copying Staff Lists – Advanced Feature

This feature is mainly for those who will be creating new campaigns using current running campaigns, as it allows for the copying of entire staff lists from one campaign to another.

When Creating a New Campaign

When creating new campaigns using existing campaigns, you will now have an option to include or exclude the staff from the existing campaign.

Campaign Details

Description

Template

Customer ID

Insurance

Campaign Configuration

Campaign Product

AQA

Campaign Template

{XXX} | Sales | AQA | v1

Which items should be copied from the template?

☒ Questions
 ☒ Lists
 ☐ Personnel

Create Campaign

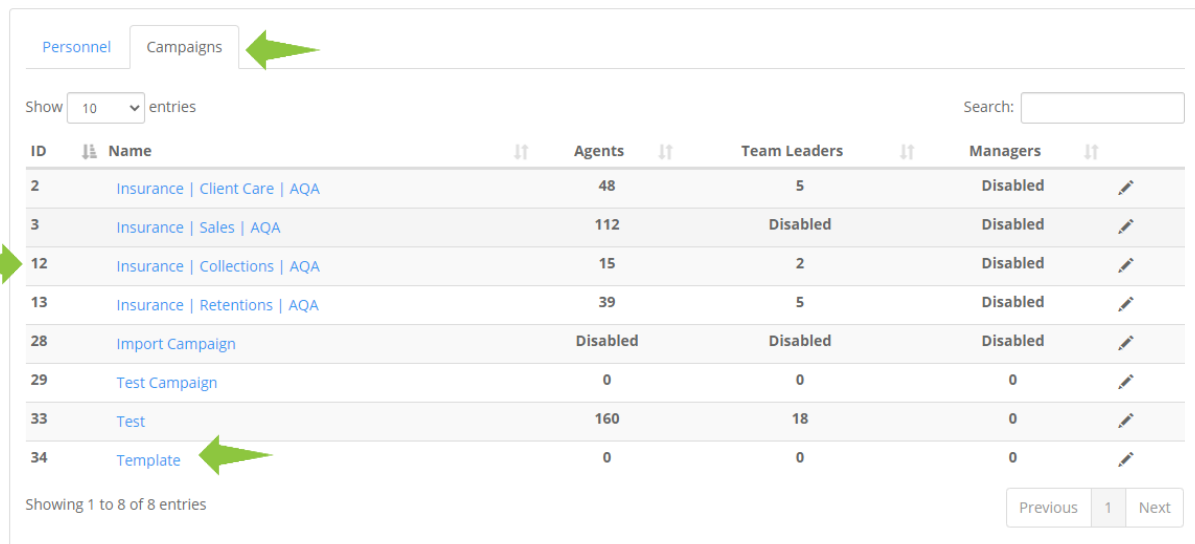
Cancel

By including a tick in the Personnel box, you will copy all the staff allocated to {XXX} | Sales | AQA | v1 to the new campaign Template.

Copy Staff Lists to an Existing Campaign

Here we are going to copy staff to an already existing campaign.

On People Management go to the Campaigns tab.



| ID | Name | Agents | Team Leaders | Managers | |
|----|-------------------------------|----------|--------------|----------|--|
| 2 | Insurance Client Care AQA | 48 | 5 | Disabled | |
| 3 | Insurance Sales AQA | 112 | Disabled | Disabled | |
| 12 | Insurance Collections AQA | 15 | 2 | Disabled | |
| 13 | Insurance Retentions AQA | 39 | 5 | Disabled | |
| 28 | Import Campaign | Disabled | Disabled | Disabled | |
| 29 | Test Campaign | 0 | 0 | 0 | |
| 33 | Test | 160 | 18 | 0 | |
| 34 | Template | 0 | 0 | 0 | |

Showing 1 to 8 of 8 entries

Previous 1 Next

We will be copying staff that are currently on the Collections Campaign to the Template Campaign which has no staff currently.

Click the Template campaign to open the side window.

Template

Search:

| Unique ID | Name | Surname | Agent | Team Leader | Mana |
|-----------|----------|---------------|----------------------------------|----------------------------------|--------------------------|
| 000001 | Adnan | Bhamjee | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> |
| 000002 | Adrian | Sagadaven | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> |
| 000003 | Ajesh | Ramphul | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> |
| 000004 | Ben | Chilufya | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> |
| 000005 | Jannie | Burness | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> |
| 000006 | Jason | Kennard-Davis | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> |
| 000007 | Novash | Manilal | <input checked="" type="radio"/> | <input type="radio"/> | <input type="checkbox"/> |
| 000008 | Ponalo | Mashile | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> |
| 000009 | Samantha | Kennedy | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> |
| 000010 | Sebin | Medley | <input type="radio"/> | <input checked="" type="radio"/> | <input type="checkbox"/> |

Showing 1 to 610 of 610 entries

Click on the button indicated above, the window below will open.

Select the Collections campaign (you can only select one campaign at a time)

And then click Copy.

Copy Campaign Personnel
×

This tool will assign the same personnel to your target campaign as the campaign you select here.

Your target campaign is **Template**

Select the campaign with the assigned personnel you wish to copy:

Search:

| ID | Name | Agents | Team Leaders | Managers |
|-------------------------------------|-------------------------------|----------|--------------|----------|
| <input type="radio"/> 2 | Insurance Client Care AQA | 48 | 5 | Disabled |
| <input type="radio"/> 3 | Insurance Sales AQA | 112 | Disabled | Disabled |
| <input checked="" type="radio"/> 12 | Insurance Collections AQA | 15 | 2 | Disabled |
| <input type="radio"/> 13 | Insurance Retentions AQA | 39 | 5 | Disabled |
| <input type="radio"/> 28 | Import Campaign | Disabled | Disabled | Disabled |
| <input type="radio"/> 29 | Test Campaign | 0 | 0 | 0 |
| <input type="radio"/> 33 | Test | 160 | 18 | 0 |

Showing 1 to 7 of 7 entries

The following message will appear and once you have refreshed the page you will see the numbers update accordingly.

Personnel assigned successfully!

Personnel

Campaigns

Show10▼entries

Search:

| ID | Name | Agents | Team Leaders | Managers | |
|----|---|----------|--------------|----------|--|
| 2 | Insurance Client Care AQA | 48 | 5 | Disabled | |
| 3 | Insurance Sales AQA | 112 | Disabled | Disabled | |
| 12 | Insurance Collections AQA | 15 | 2 | Disabled | |
| 13 | Insurance Retentions AQA | 39 | 5 | Disabled | |
| 28 | Import Campaign | Disabled | Disabled | Disabled | |
| 29 | Test Campaign | 0 | 0 | 0 | |
| 33 | Test | 160 | 18 | 0 | |
| 34 | Template | 15 | 2 | 0 | |

Showing 1 to 8 of 8 entries

Previous

1

Next

We are now going to add the staff from the Client Care campaign to the Template campaign.

Follow the same process as above.

You will now see that because we already have staff on the Template campaign you will be given an option to either keep or replace the existing staff.

We will be adding to the staff compliment.

Copy Campaign Personnel

This tool will assign the same personnel to your target campaign as the campaign you select here.

Your target campaign is **Template**

Select the campaign with the assigned personnel you wish to copy:

Search:

| ID | Name | Agents | Team Leaders | Managers |
|------------------------------------|-------------------------------|----------|--------------|----------|
| <input checked="" type="radio"/> 2 | Insurance Client Care AQA | 48 | 5 | Disabled |
| <input type="radio"/> 3 | Insurance Sales AQA | 112 | Disabled | Disabled |
| <input type="radio"/> 12 | Insurance Collections AQA | 15 | 2 | Disabled |
| <input type="radio"/> 13 | Insurance Retentions AQA | 39 | 5 | Disabled |
| <input type="radio"/> 28 | Import Campaign | Disabled | Disabled | Disabled |
| <input type="radio"/> 29 | Test Campaign | 0 | 0 | 0 |
| <input type="radio"/> 33 | Test | 160 | 18 | 0 |

Showing 1 to 7 of 7 entries

It looks like your campaign (**Template**) already has some personnel assigned to it.
What would you like to do?

☒ Keep the current personnel assigned when copying

☐ Unassign the current personnel when copying

Copy Cancel

The Template campaign will now have a combination of the staff from both the Collections and Client Care campaigns.

Customer
Insurance

Add Personnel Refresh Import Export Merge

Personnel Campaigns

Show 10 entries Search:

| ID | Name | Agents | Team Leaders | Managers | |
|----|-------------------------------|----------|--------------|----------|--|
| 2 | Insurance Client Care AQA | 48 | 5 | Disabled | |
| 3 | Insurance Sales AQA | 112 | Disabled | Disabled | |
| 12 | Insurance Collections AQA | 15 | 2 | Disabled | |
| 13 | Insurance Retentions AQA | 39 | 5 | Disabled | |
| 28 | Import Campaign | Disabled | Disabled | Disabled | |
| 29 | Test Campaign | 0 | 0 | 0 | |
| 33 | Test | 160 | 18 | 0 | |
| 34 | Template | 63 | 7 | 0 | |

Showing 1 to 8 of 8 entries
Previous 1 Next

Please note that this copy function will not work across client dbs.

You will only be able to assign staff between campaigns on the same client db.

FIN