

Personnel Management

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Revision	Date	Name	Description
1.0	2021/01/01	L Petersen	Initial doc.
1.1	2021/04/16	L Petersen	Added Bulk Staff Allocations
1.2	2021/06/23	L Petersen	Import .csv Bulk Allocations

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:

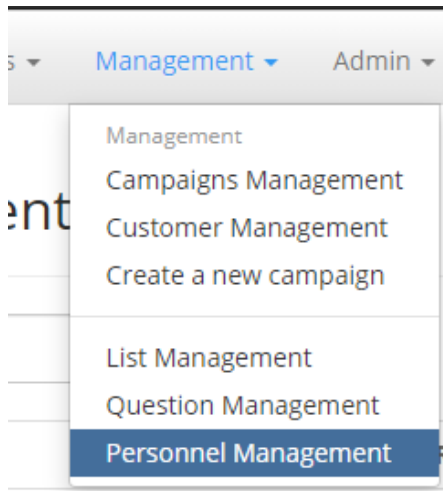
- A unique id will be allocated to each new person automatically
- Email and Employee id are non-compulsory
- Person can be allocated (assigned) to multiple campaigns per customer (db)
- Person can be disabled from list (which will remove them from their respective list, but not reporting.)
- Where name 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.



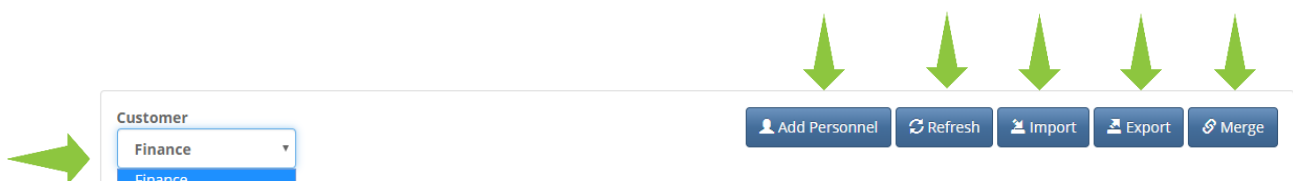
There are 2 views available as well a menu.

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.

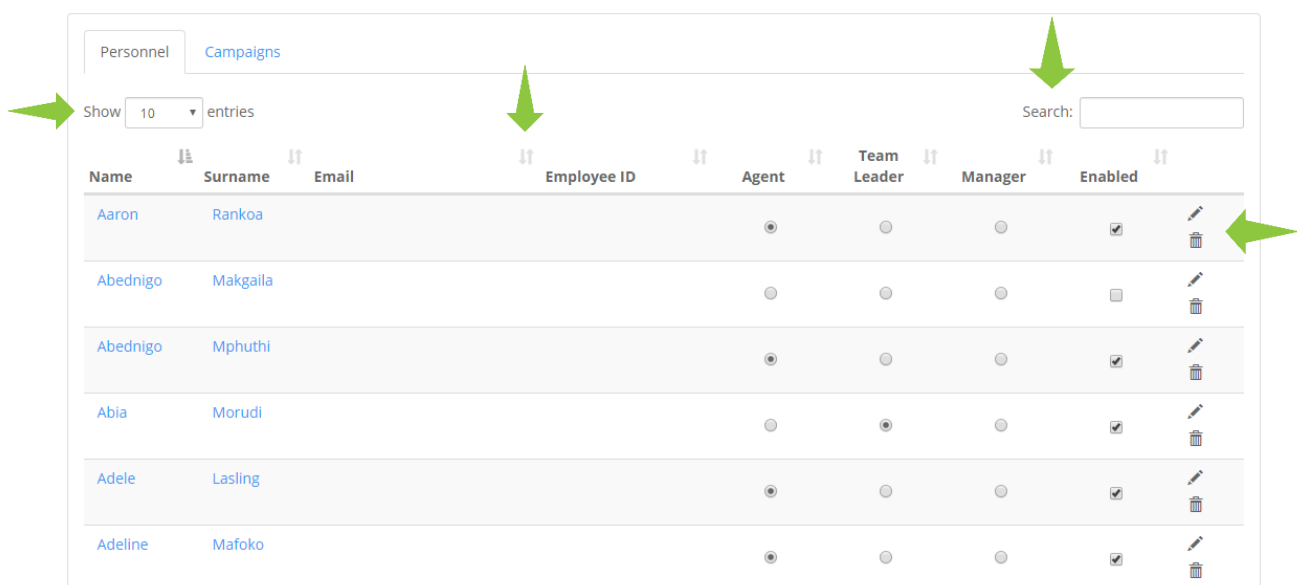
If there are captures you can remove the person from the lists by disabling that person.













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' field, the sorting arrows on the column headers, and the pencil icon in the 'Managers' column.

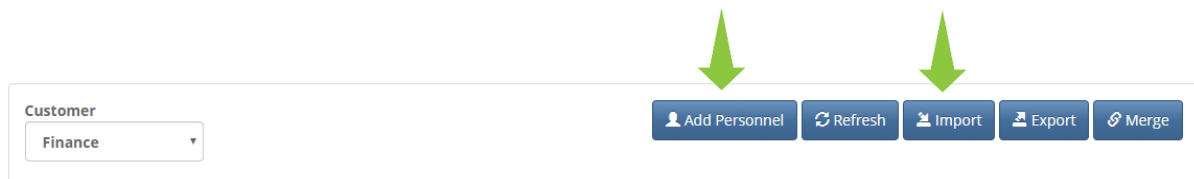
ID	Name	Agents	Team Leaders	Managers
5	Finance Customer Services AQA V2	119	14	Disabled
6	Finance Collections AQA English Pilot	49	4	Disabled
7	Finance Collections AQA Vernac Pilot	26	2	Disabled
9	Finance Sales QA AQA	192	16	2
10	Finance Sales Supervisor AQA	192	16	2
12	Finance Sales Coach AQA	192	16	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. On the left, there's a 'Personnel Management' sidebar with a 'Customer' dropdown set to 'Finance'. The main form has the following fields: 'Enter Name' (Name *) with a red border, 'Enter Surname' (Surname *) with a red border, 'Enter Email' (Email), 'Enter Employee ID' (Employee ID), '30-Mar-2020' (Start Date *) with a red border, '30-03-2020' (Last Edit Date), and a role selection section with radio buttons for 'Agent', 'Team Leader', and 'Manager'. At the bottom is an 'ENABLED' toggle switch. On the right, there's 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.

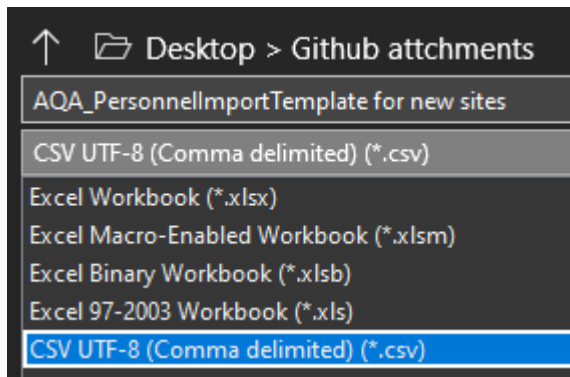
3. Select the campaign(s) to assign to these personnel. (Optional)

Search:

Select	ID	Campaign	Agents	Team Leaders	Managers
All <input type="checkbox"/>					
<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 (file provided in UTF-8 format).

Save as a CSV UTF-8 (this is to insure that all accent options are saved correctly)



File	Home	Insert	Page Layout	Formulas	Data	Review	View	Help	Share	Comments
E20										
	A	B	C	D	E	F	G	H	I	J
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.

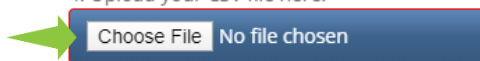
The order you put your staff in doesn't matter as long as your allocations of TRUE/FALSE are correct.

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

Select 						
All <input type="checkbox"/>	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

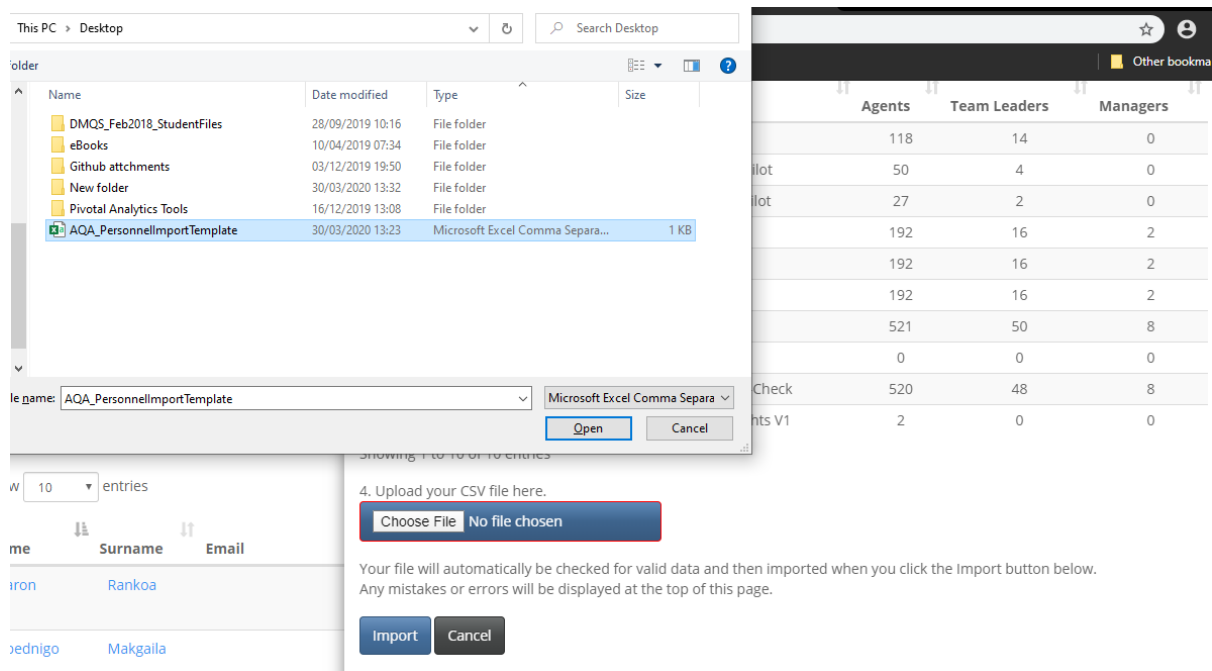
4. Upload your CSV file here.



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.

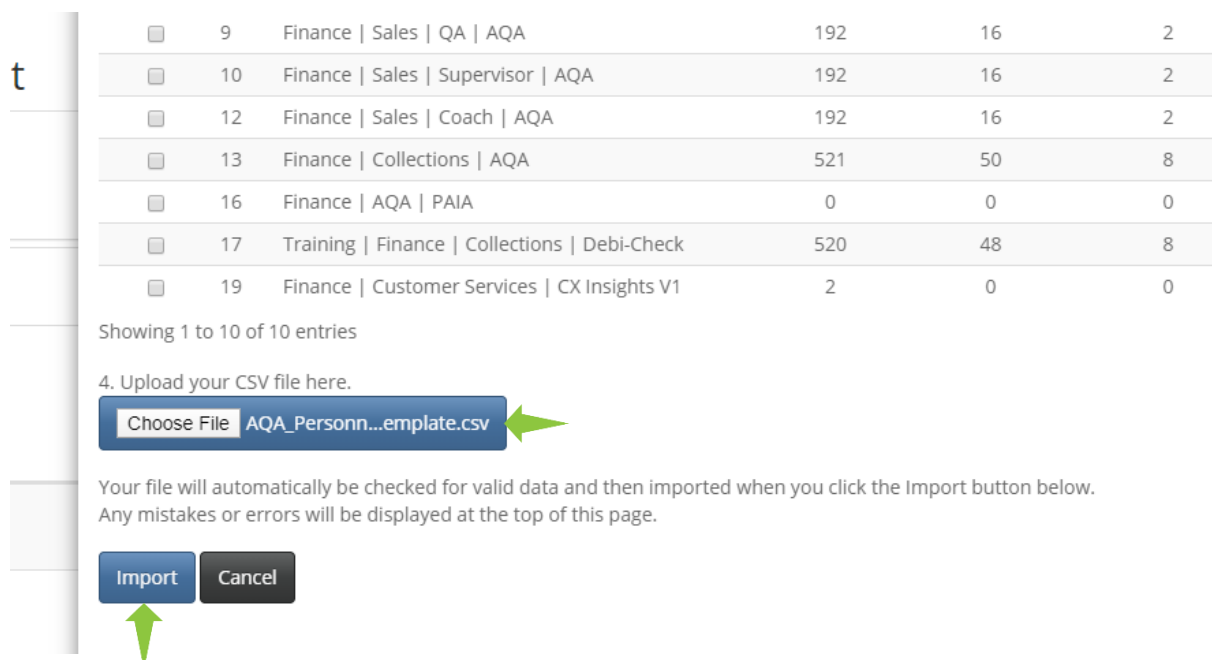


Browse to the location you have saved the file and select Open.



You will see your file name next Choose File

Select Import



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.

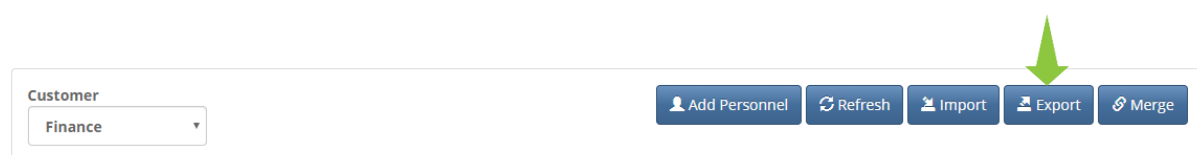
Name	Surname	Email	Employee ID	Agent	Team Leader	Manager	Enabled	
Brian	Toms	TomsB@company.com	48420916	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	
Joe	Soap	SoapJ@company.com	66947424	<input checked="" type="radio"/>	<input type="radio"/>	<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.



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 column 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	Mahlatsi	Maleswena			05/04/2019 00:00	26/03/2020 00:00	TRUE	FALSE	FALSE	TRUE
28	441	Mante	Tompone			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:

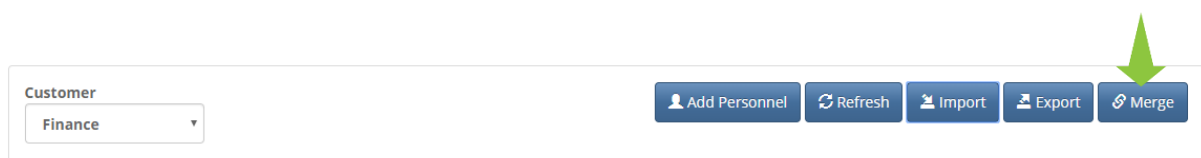
1. This is a consolidated view of both the campaigns I've selected. Therefore agents on both campaigns will only show once.
2. No campaign allocations will show here.
3. The list is sorted by Unique ID.

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.



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

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"/>	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 checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	000152	Mamphoto	Ramahlo	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	000482	Mpho	Letakgomo	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	000752	Mpho	Matshaba	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	000753	Mpho	Moeketsi	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	000163	Mpho	Ngobeni	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/>	000164	Mpho	Polori	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	000483	Mpho Ruth	Thipe	<input checked="" 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 Karabo Mokobane	21	1	95.2 %	100.0 %	95.2 %	100.0 %	100.0 %	1	0
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"/>	
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"/>	

The greyed out areas can't be changed, however there 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 | Cu

User ID: a

ConnectionID:

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

Thembi 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:

User ID: admin

Date:

Call Details Question

Captured Reason:

Collection Date:

Agent ID:

Service Line:

Team Leader:

Duration:

Repeat Call:

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="radio"/>	<input type="radio"/>	<input type="radio"/>	<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: fis

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

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 Mavema
 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

Allocating Bulk Staff to Campaigns

In the previous chapters, we showed you how to allocate individual existing staff to campaigns using the edit function or adding new staff to campaign with the import function.

Here we will show you how to allocate bulk allocate existing staff to a campaign.

There are a few ways to do this.

- Creating a new campaign
- Transferring / Copying between existing campaigns
- Importing Unique IDs using a .csv import

Creating a New Campaign

This function is specific to those who can create new campaigns on our app.

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

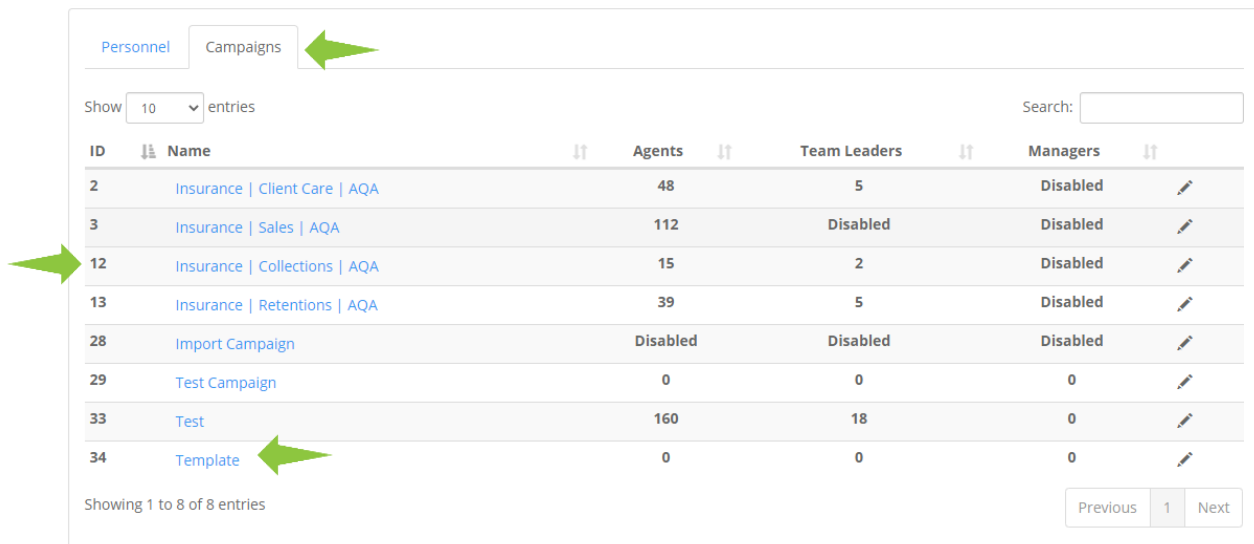
Cancel

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.

Bulk staff allocations between existing campaigns

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

On Personnel 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.

Click on the button indicated below.

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	Esbin	Moodley	<input type="radio"/>	<input checked="" type="radio"/>	<input type="checkbox"/>

Showing 1 to 610 of 610 entries

Save

Cancel

Bulk Assign from a Campaign

Bulk Assign from a CSV File

Bulk Operations

In the new window, 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

Copy

Cancel

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

Personnel assigned successfully!

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	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.

Bulk allocations using a .csv import

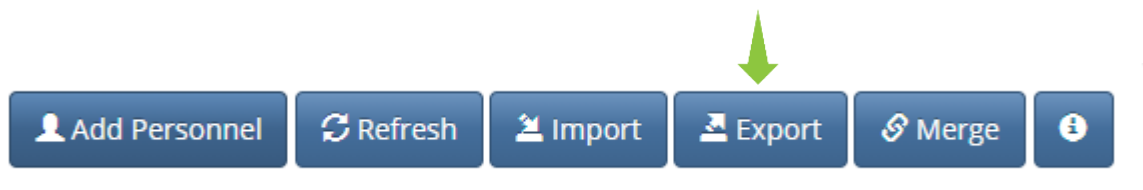
This function allows you to manage your staff allocations using a .csv file.

It should be noted that you can not add staff or change any staff detail using this functionality.

It will only manage existing staff allocation to a specific campaign.

You will need to have the unique id of your staff to use this function.

To get that information, you will use the Export function on Personnel Manager.



Once you click Export, the following window will pop out.

If you are not sure on which campaign the required agent is situated, you can Select All as in the screen shot below.

Export to CSV

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

Search:

Select	ID	Campaign	Agents	Team Leaders	Managers
All <input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	2	Insurance Client Care AQA	48	5	0
<input checked="" type="checkbox"/>	3	Insurance Sales AQA	112	0	0
<input checked="" type="checkbox"/>	12	Insurance Collections AQA	15	2	0
<input checked="" type="checkbox"/>	13	Insurance Retentions AQA	39	5	0
<input checked="" type="checkbox"/>	28	Import Campaign	0	0	0
<input checked="" type="checkbox"/>	29	Test Campaign	48	5	0
<input checked="" type="checkbox"/>	33	Test	160	18	0
<input checked="" type="checkbox"/>	34	Template	63	7	0
<input checked="" type="checkbox"/>	36	Cancellations Template	0	0	0
<input checked="" type="checkbox"/>	37	Cancellations & Retentions	0	0	0
<input checked="" type="checkbox"/>	0	Unassigned Personnel	0	0	0

Showing 1 to 11 of 11 entries


Export

Cancel

You will see that you can now also select personnel not allocated to a given campaign - *Unassigned Personnel*.


Once you have clicked on Export, you will get a .csv download like the one below.

Search for the ids of the personnel you want allocated to the new campaign.




Unique ID	Name	Surname	Employee ID	Email	Start Date	Last Edit Date	Agent	Team Lead	Manager	Enabled
1	Adnan	Bhamjee			02/02/2018 00:00	10/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
2	Adrian	Sagadaven			05/02/2018 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
4	Ben	Chilufya			02/02/2018 00:00	10/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
5	Jannie	Burness			05/02/2018 00:00	10/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
7	Novash	Manilal			09/04/2018 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
8	Ponalo	Mashile			15/02/2018 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
9	Samantha	Kennedy			21/04/2017 00:00	10/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
11	Thireshen	Vather			05/02/2018 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
12	Thomas	Kekana			16/05/2018 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
14	Vuyo	Vumendlini			02/02/2018 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
15	Warrick	Metlerkamp			17/05/2018 00:00	10/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
16	Wesley	Tumu			08/02/2018 00:00	10/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
17	Amori	Lemley			04/12/2017 00:00	05/08/2020 00:00	FALSE	TRUE	FALSE	FALSE
18	Bradley	Carradus			05/04/2017 00:00	10/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
19	Cherese	Leafe			05/04/2017 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
20	Chester	Hartze			22/11/2018 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
22	Jason	Badenhorst			07/06/2017 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
23	Kushen	Govender			15/05/2018 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
24	Leevashan	Naidoo			06/04/2017 00:00	05/08/2020 00:00	FALSE	TRUE	FALSE	TRUE
26	Marelda	Pause			06/04/2017 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
29	Thrishan	Pather			12/04/2017 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
31	Alishia	Govender			13/04/2017 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE

Now go to the Campaigns tab and select the campaign you wish to update.

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	48	5	0
33	Test	160	18	0
34	Template	63	7	0
36	Cancellations Template	Disabled	Disabled	Disabled
37	Cancellations & Retentions	0	0	0



Template

Search:

Unique ID	Name	Surname	Agent	Team Leader	Manager	Assigned
000014	Vuyo	Vumchandi	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
000015	Warrick	Metlerkamp	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
000016	Wesley	Tumu	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
000018	Bradley	Carradus	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
000019	Cherese	Leafe	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
000020	Chester	Hartze	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
000021	Collin	Zwanepoel	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
000022	Jason	Badenhorst	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
000023	Kushen	Govender	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
000024	Leevashan	Naidoo	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

Showing 1 to 610 of 610 entries

Bulk Assign from a Campaign

Bulk Assign from a CSV File

Select the *Bulk Assign from a CSV File* and the following window will pop out.

Download the assigned personnel csv.

Bulk Assign from CSV

Bulk assign **existing** persons to the campaign by uploading a CSV file.

Note this does not create new personnel. It is only for assigning personnel to campaigns in bulk.

1. [Download the assigned personnel as CSV.](#)
2. Add/Remove assigned personnel from the file.
 - All persons listed in the file will be assigned to the campaign.
 - All persons not listed in the file will be unassigned from the campaign.
 - Only the "Unique ID" field is required. All other fields in the file (names, roles, etc.) are ignored in this process.

3. Upload your CSV file here.

No file chosen

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

You will get a campaign specific csv like the previous export.

Unique ID	Name	Surname	Employee ID	Email	Start Date	Last Edit Date	Agent	Team Leader	Manager	Enabled
18	Bradley	Carradus			05/04/2017 00:00	10/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
19	Cherese	Leafe			05/04/2017 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
23	Kushen	Govender			15/05/2018 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
24	Leevashan	Naidoo			06/04/2017 00:00	05/08/2020 00:00	FALSE	TRUE	FALSE	TRUE
29	Thrishan	Pather			12/04/2017 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
35	Vimal	Roopchund			13/04/2017 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
41	Shaakirah	Choonara			02/05/2017 00:00	09/06/2020 00:00	FALSE	TRUE	FALSE	TRUE
43	Abednego	Naidoo			17/10/2018 00:00	10/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
49	Ammarah	Dawood			04/07/2019 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
68	Bella	Masekela			09/07/2018 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
242	Noluthando	Thamane			05/10/2018 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
367	Anri	Louw			30/04/2019 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
368	Anriette	Viljoen			09/04/2018 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
371	Byron	September			06/11/2018 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE

Scroll down to the bottom of this download and add the users you want allocated to the campaign. Note only the id are required, other detail will be ignored.

67	590 Mamphulo	Boya			21/05/2019 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
68	591 Mapapo Abitha	Boya			07/02/2020 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
69	592 Michelle	Mnisi			25/03/2019 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
70	593 Shirlene	Marema			12/03/2019 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
71	594 Thembi	Masemola			19/11/2018 00:00	09/06/2020 00:00	TRUE	FALSE	FALSE	TRUE
72	740 Fatimah	Ntuli			18/10/2018 00:00	05/08/2020 00:00	TRUE	FALSE	FALSE	TRUE
73	7									
74	12									
75	33									
76	42									
77	43									
78	47									
79	48									
80	49									
81	50									

You can also remove any rows where you want to unassign from the campaign.

Save your file.

Note: that I have added user id 43 and 49 to the campaign even though they are already allocated to the campaign. We will come back to this later.

Now go back to the bulk assign window on the app.

Select *Choose File* and browse to your saved updated file and select it.

Click *Assign*.

Bulk Assign from CSV

Bulk assign **existing** persons to the campaign by uploading a CSV file.

Note this does not create new personnel. It is only for assigning personnel to campaigns in bulk.

1. [Download the assigned personnel as CSV.](#)
2. Add/Remove assigned personnel from the file.
 - All persons listed in the file will be assigned to the campaign.
 - All persons not listed in the file will be unassigned from the campaign.
 - Only the "Unique ID" field is required. All other fields in the file (names, roles, etc.) are ignored in this process.

3. Upload your CSV file here.



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



You will get the following notification and after you have used the *Refresh* button your campaign numbers will be updated.

Bulk Assign Successful!

You will get the following type of notification if you have an error on your file.

All valid personnel will be allocated.

Bulk Assign from CSV

File Invalid: AQA_BulkAssign_CampaignID_34.csv
- Line 82: No person found with this Unique ID: 900

Original agent count = 63

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	48	5	0
33	Test	160	18	0
34	Template	63	7	0
36	Cancellations Template	Disabled	Disabled	Disabled
37	Cancellations & Retentions	0	0	0

I added 9 additional personnel, of which 2 were already assigned to the campaign (id 43 & 49) as mentioned earlier.

The system has recognised this and allocated the 7 unique ids to the campaign, leaving you with a new total of 70 agents.

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	48	5	0
33	Test	160	18	0
34	Template	70	7	0
36	Cancellations Template	Disabled	Disabled	Disabled
37	Cancellations & Retentions	0	0	0

FIN