TCall.ai Admin Dashboard — User Manual
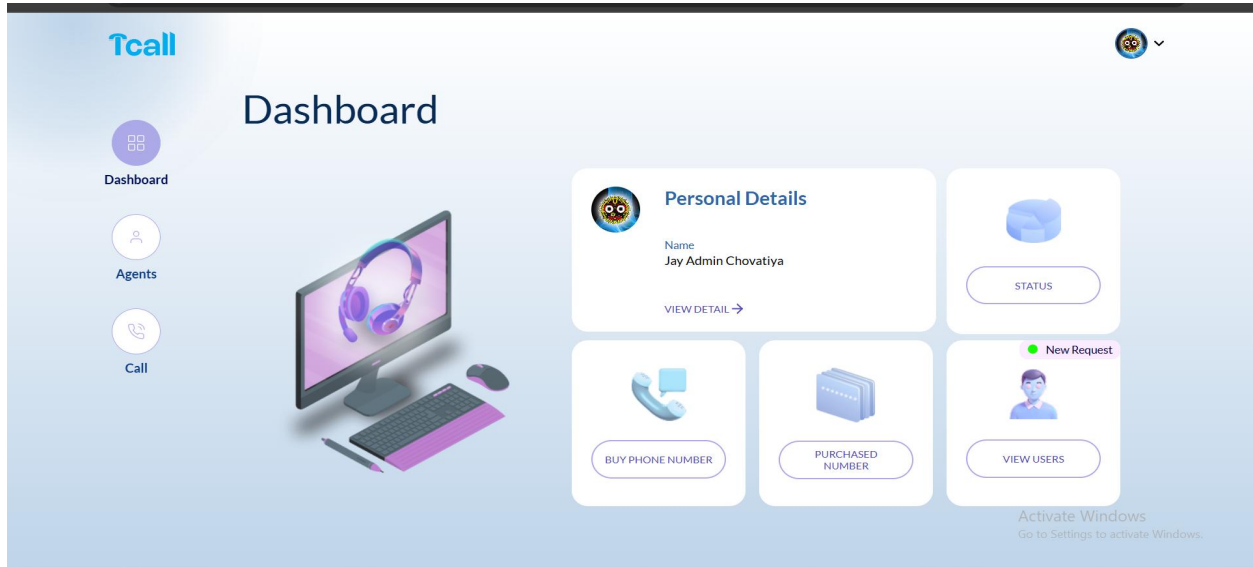
This manual is designed to help Admin users navigate and use the features available in the TCall.ai Admin Dashboard effectively.
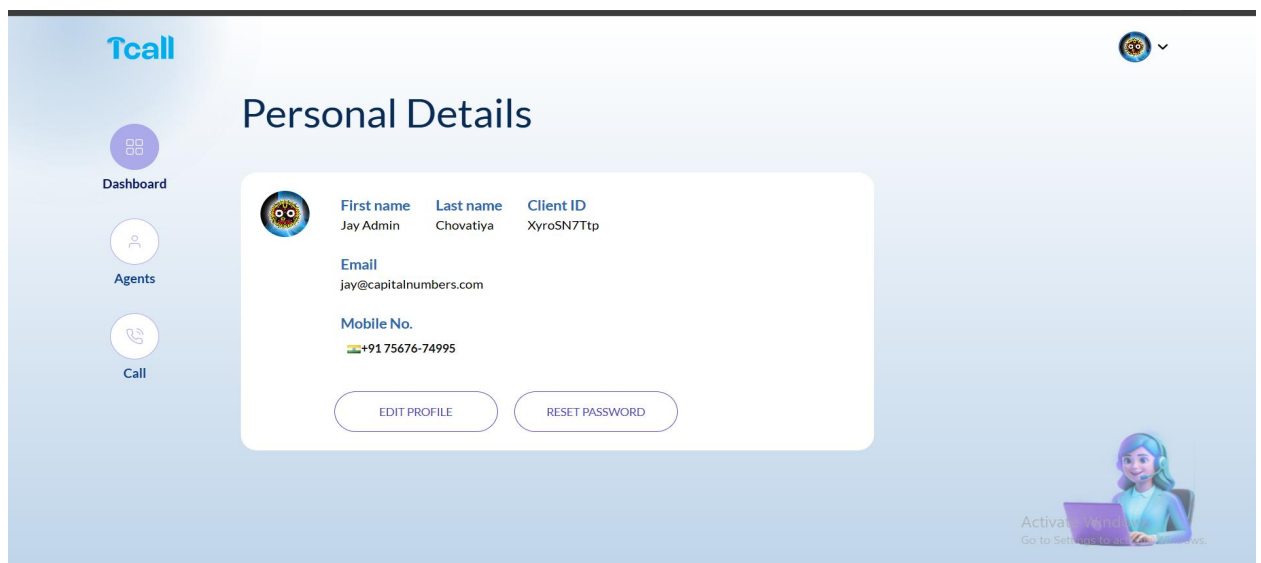
## Table of Contents

1. Dashboard Module

1.1 Personal Details

- Allows Admin to update personal information such as name, email, and contact number.

1.2 Buy A Phone Number

- Lists available Twilio phone numbers.

- Admin can purchase numbers that **do not** require regulatory documentation directly from the panel.

- For regulated numbers, Admin must purchase them via Twilio's website and manually register them in the Django Admin panel.
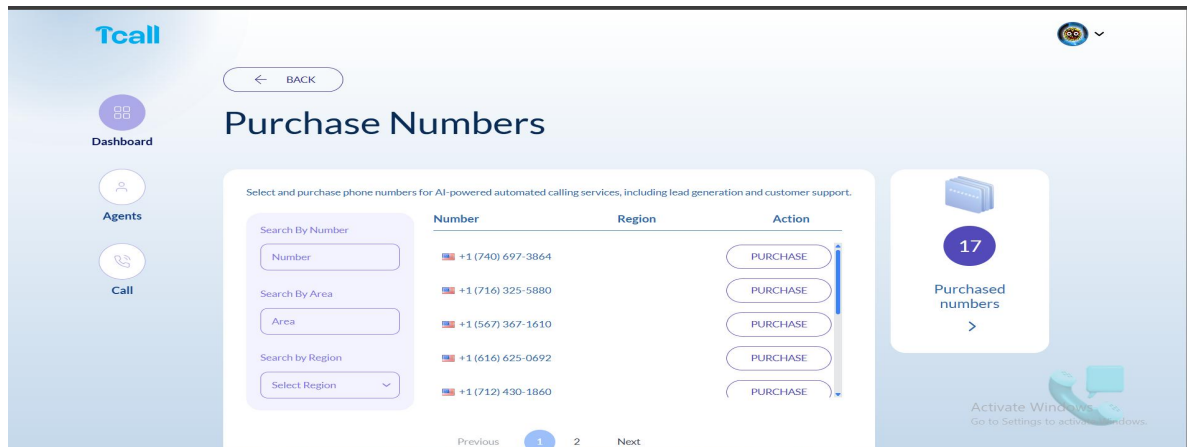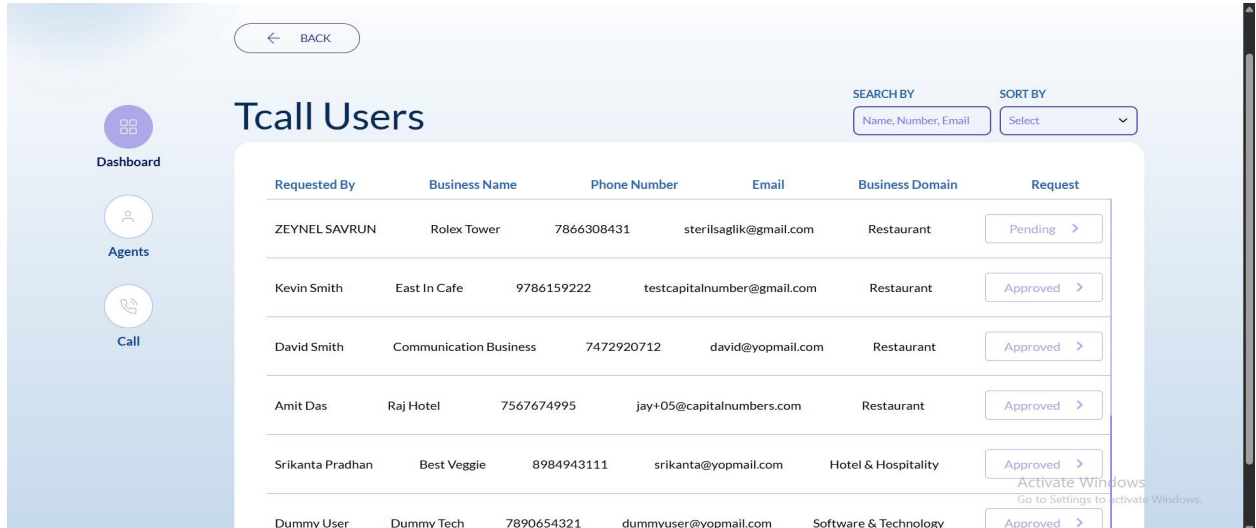

1.3 Purchased Numbers

- Displays all purchased numbers.

- Admin can **assign or unassign** these numbers to clients (users).
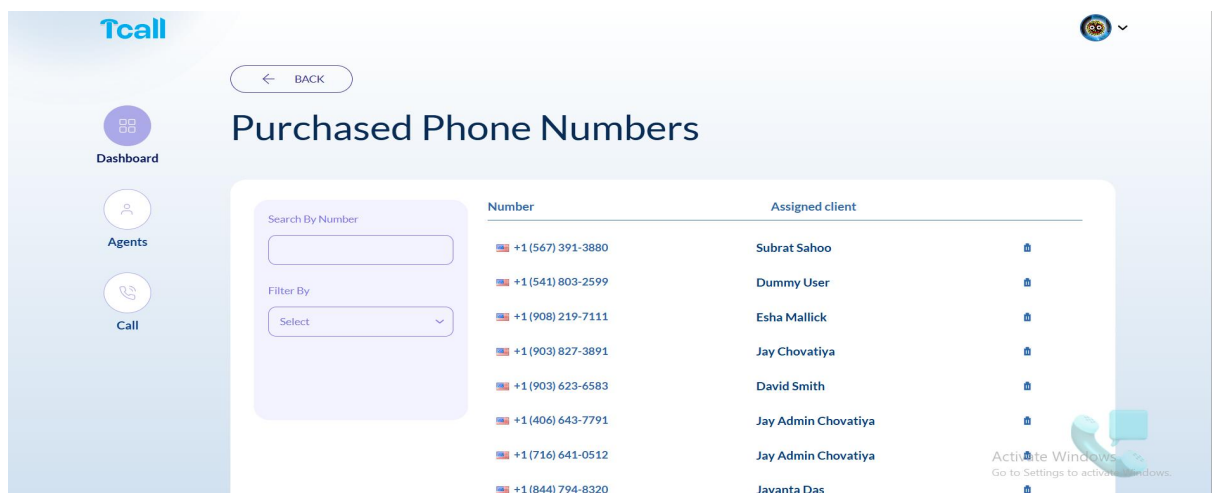
1.4 View Users

- Shows registered users and their submitted business details.

- Admin can **verify and approve or decline** profiles.

- Approval is allowed **only after** assigning at least one purchased number **and** an AI agent to the client.

1.5 Status (Statistics)

- Displays key platform metrics, including:

    - Total revenue from subscription plans.

    - Breakdown of plan types and sales volume.

    - Number and duration of inbound/outbound calls.

    - Total costs from third-party services (e.g., Twilio, Retell, ElevenLabs).

    - Profit calculation after deducting service charges.

2. Agent Module
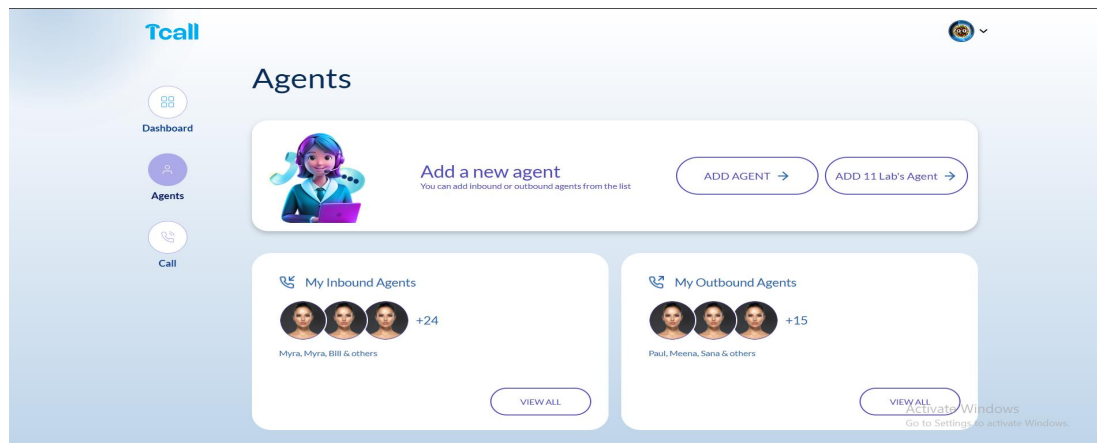
2.1 Create an AI Agent

Admin can create AI agents (Eleven labs / Retell agent as per requirement) for handling or initiating calls. There are **two types** of agents:

- **Inbound Agent**: Handles incoming calls.

- **Outbound Agent**: Initiates outgoing calls.

Steps to create an AI agent:

1. Choose **Agent Type**: Inbound or Outbound.

2. Select **Agent Voice**: Voices are predefined and managed from the Django Admin panel.

3. Select **Language**: Choose the language the agent will use.

4. Choose **Prompt**: Select a pre-configured prompt (added via Django Admin) based on the scenario.

5. Assign to a **Client**: Choose the client the agent is being created for.

6. Add **Initial Message**: Greeting or introductory message used when the agent starts a conversation.

7. Set **Agent Name**.

8. Click **Save Agent** to complete the creation.

   Note: Voices and prompts should be configured in advance through the Django Admin backend.
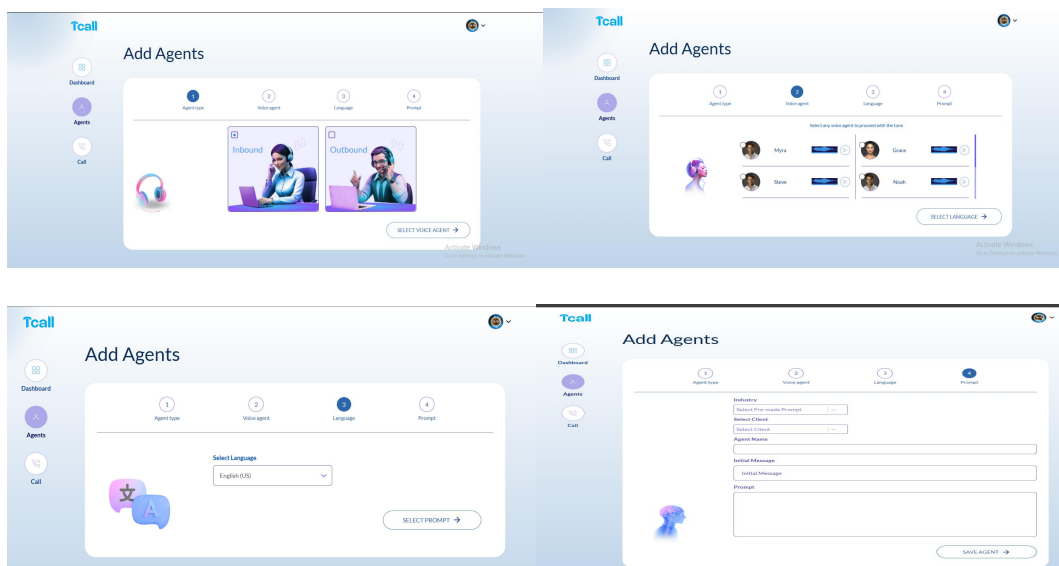
2.2 View Agent Lists

- Admin can view separate lists of:

○ **Inbound Agents**

○ **Outbound Agents**
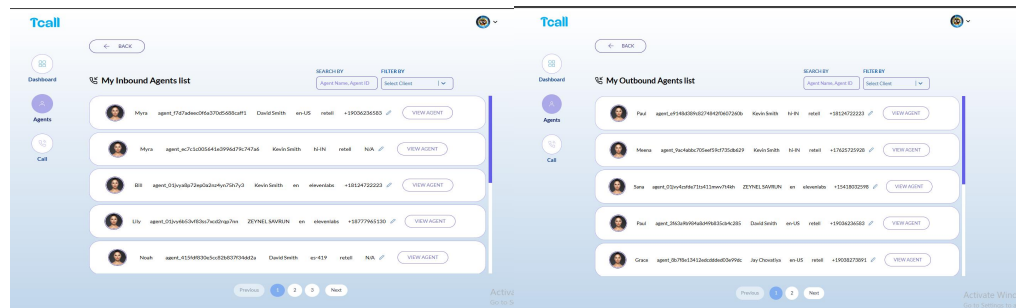
● From the list view:

  ○ Filter agents by **Client** or **Agent ID**.

  ○ Directly **assign a phone number** to the agent.

2.3 View/Update Agent Configuration

● Admin can view and edit an agent's configuration:

  ○ Change **Agent Voice**

  ○ Update **Language**

    ○   Modify the assigned **Prompt**

Note: Additional agent configuration options (e.g., website-specific settings for marketing) can be managed through the Django Admin panel.

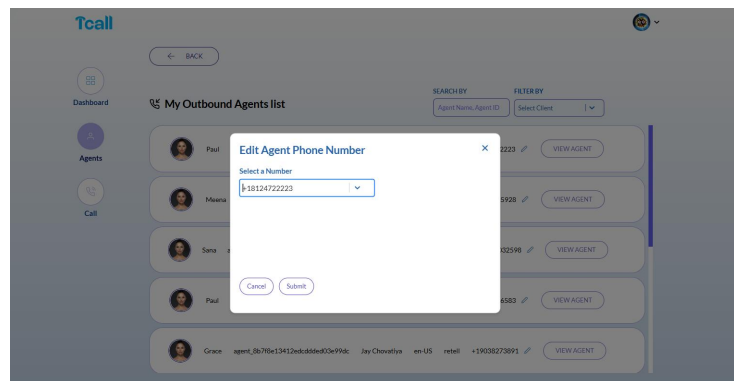# 3. Call Module
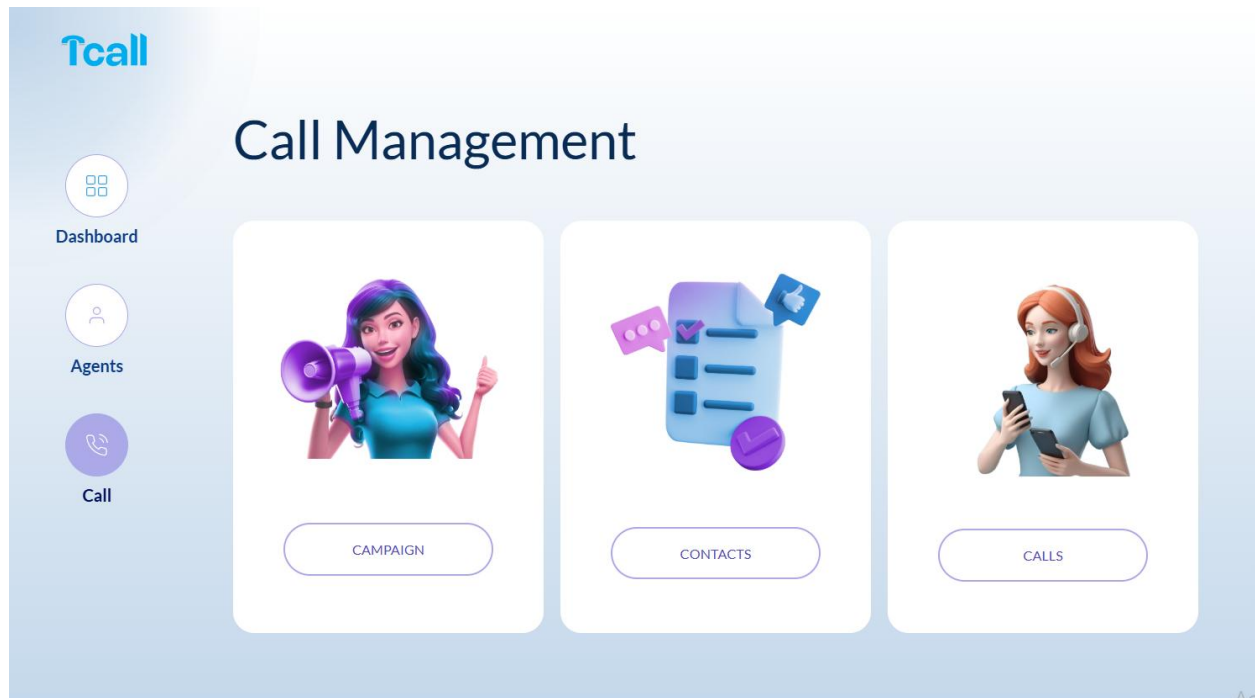
3.1 Campaign Management

a. Create a Campaign

- Define: campaign name, contact group, schedule (date & time), AI agent

- Calls are batch-executed automatically as per schedule

- Call logs are visible in the Call History section
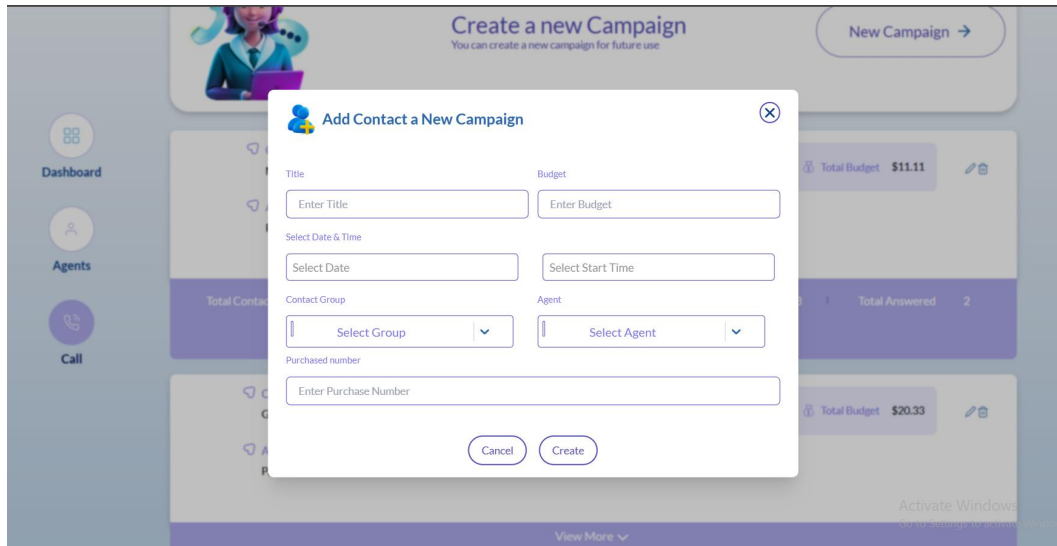
b. Campaign List

- View all campaigns with statuses:

  - **Completed**

  - **In Progress**

  - **Pending**

- Basic campaign performance stats are included
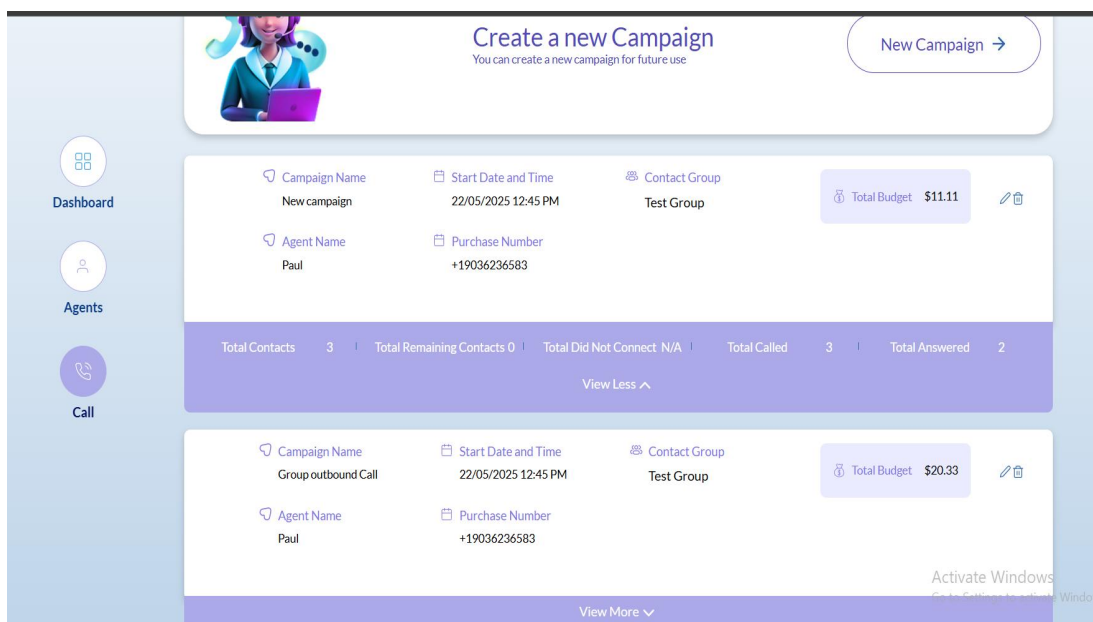
3.2 Contact Management

a. Create Manual Contact

- Add contact manually with name, number, and email
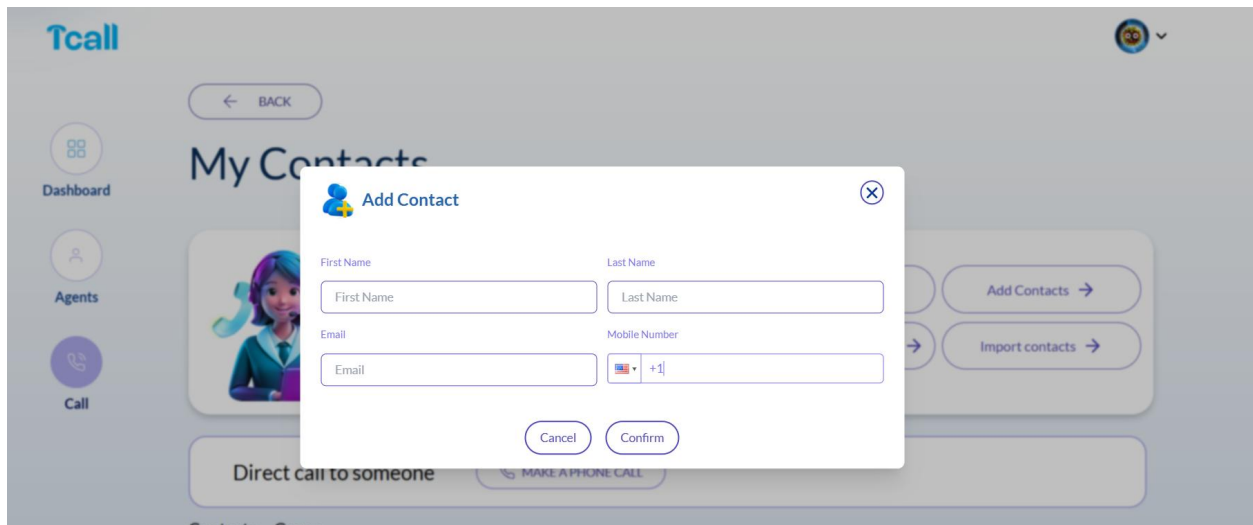
b. Import Contacts

- Upload Excel file to import multiple contacts
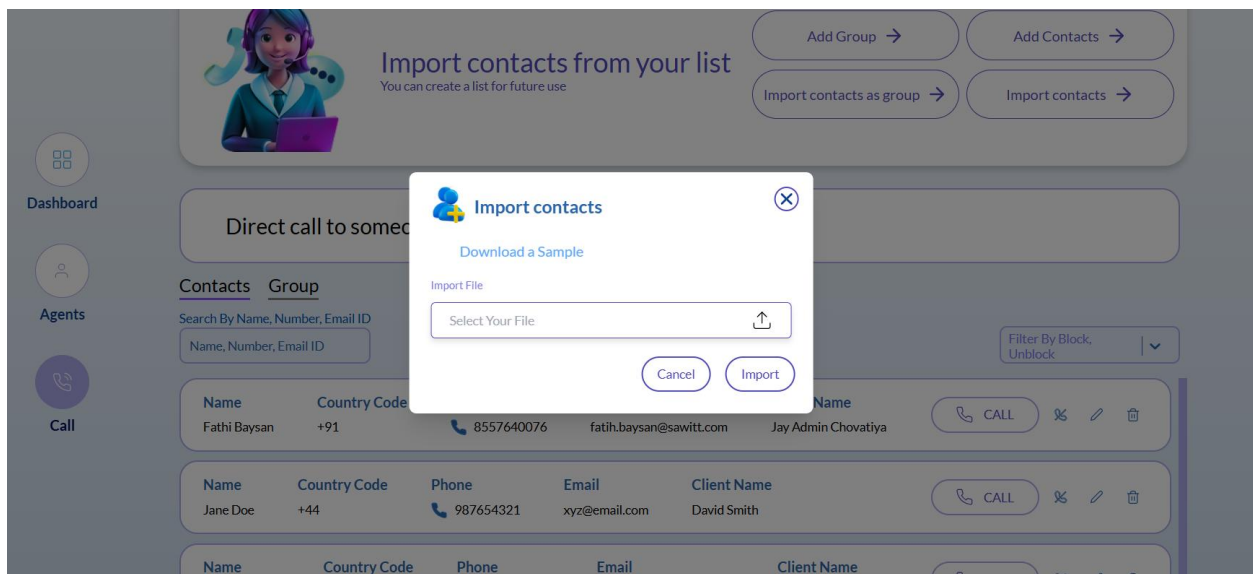
c. Create Manual Contact Group

- Manually create a group and assign saved contacts
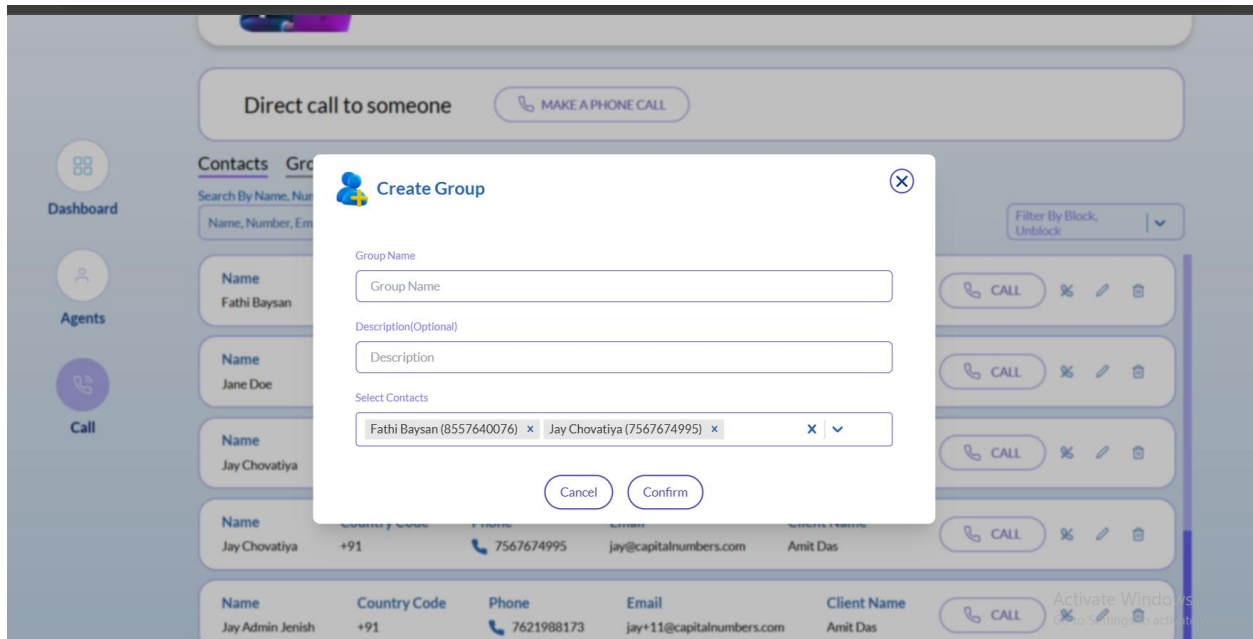
d. Import Contact as Group

- Upload Excel to create a group

- Existing contacts are skipped and only grouped

- New contacts are added and grouped
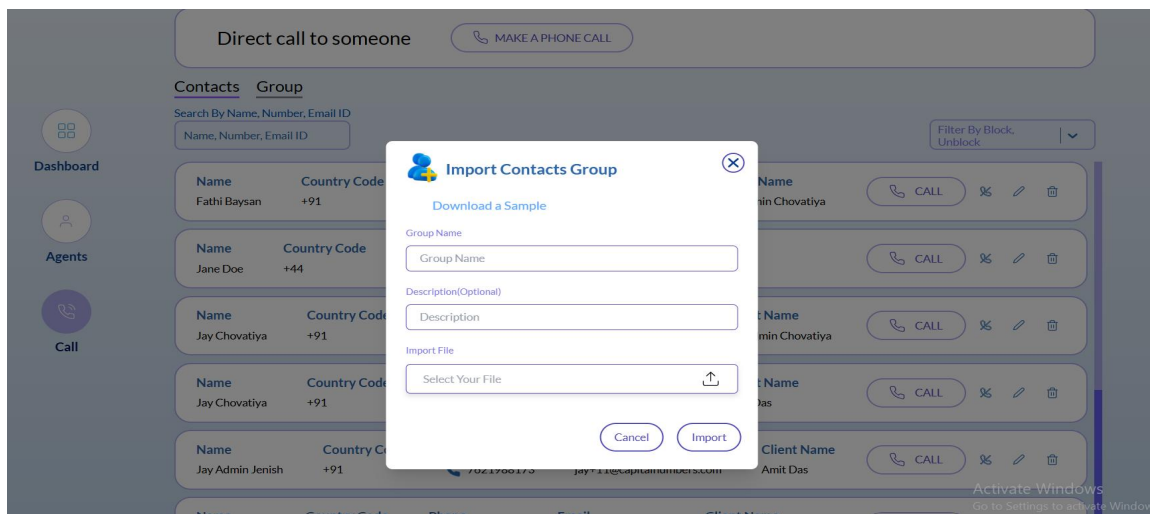
e. Make Manual Call

- Add phone number and select an **Outbound Agent**

- Initiate a single manual call from the panel
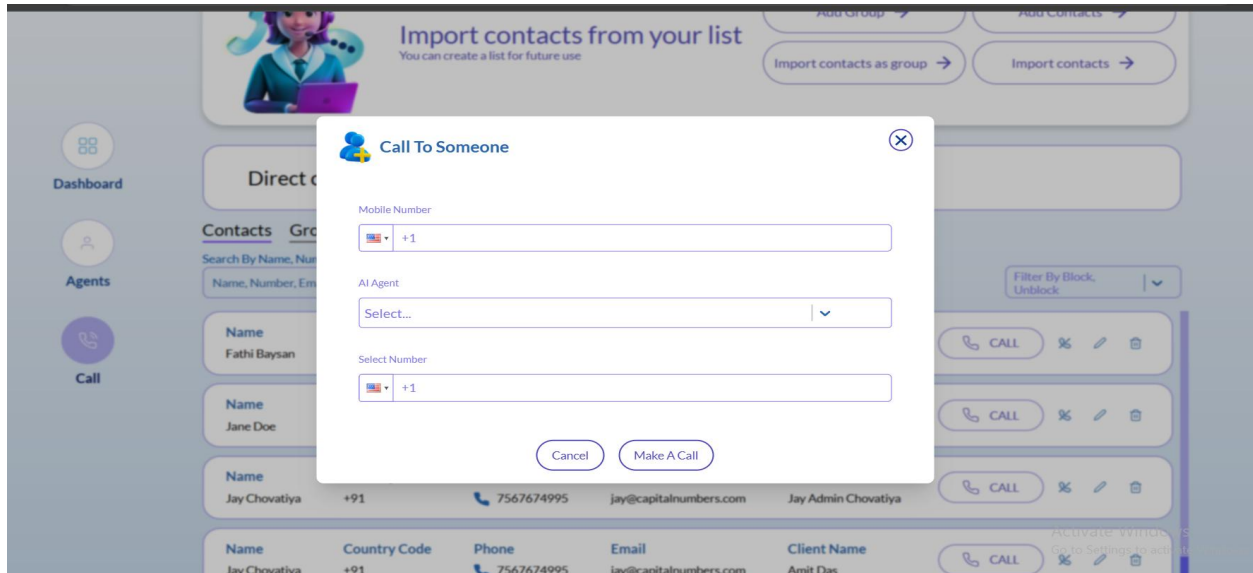
f. Contact List

- View all contacts

- Update, delete, or block contacts

- Make a call directly from the list by selecting an AI agent
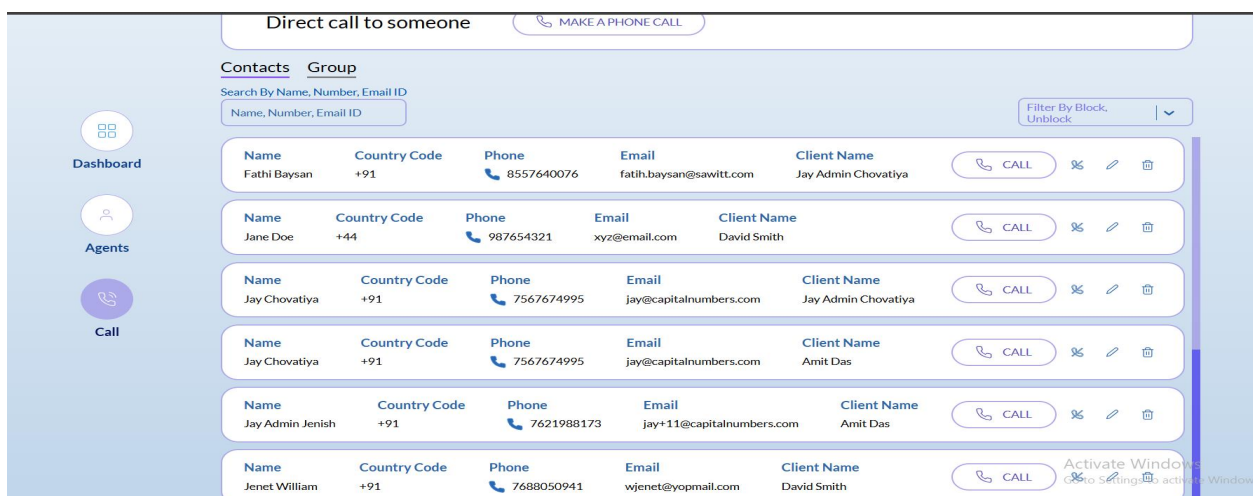
Admins can search by name/number and filter by specific client.

g. Group List

- View all contact groups

- See all contacts in a group

- Update/delete contacts or the group itself
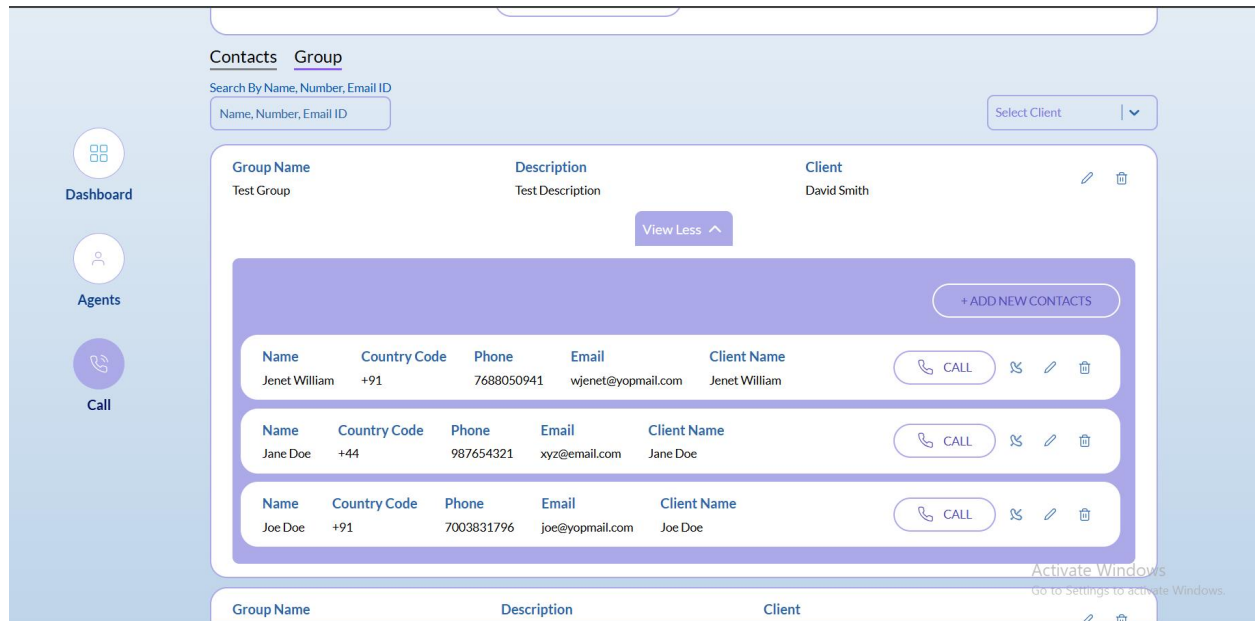
Admins can search by name/number and filter by specific client.

3.3 Calls & Logs

a. Unique Number List

- Shows all numbers assigned to clients or AI agents

- View number details: assigned client, total calls made
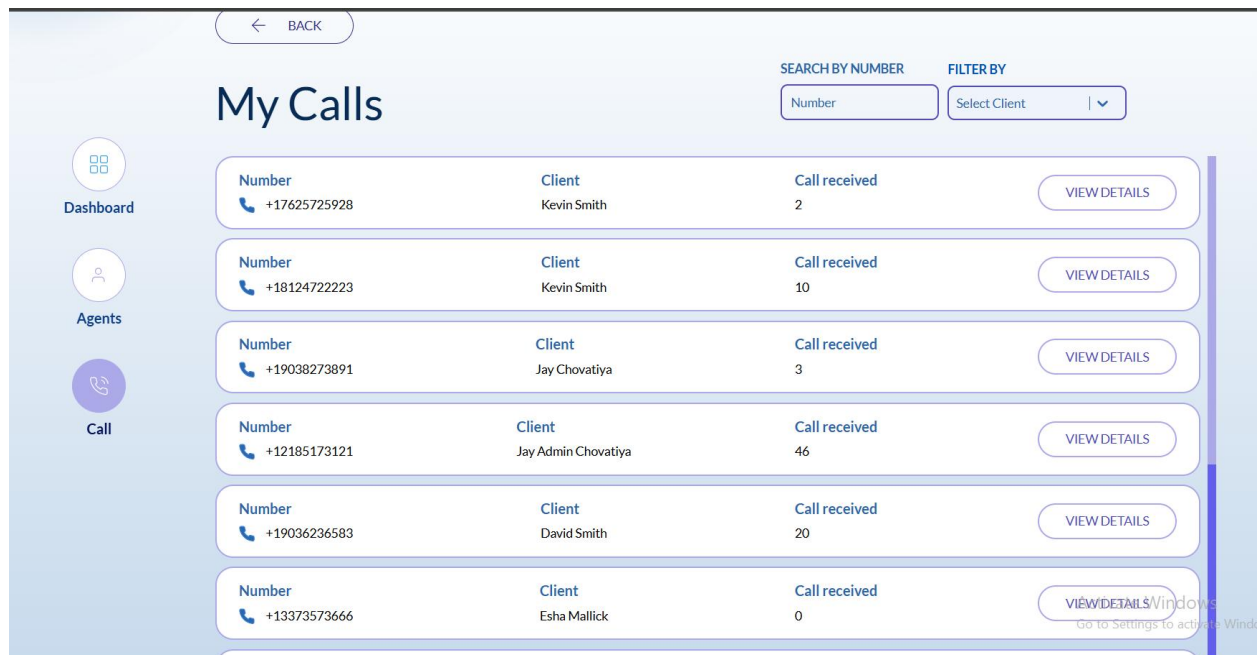
b. Call Logs / History

- Click **"View Details"** on a number to see:

  - Full call history

  - Call duration, timestamps

  - Transcriptions

  - Call recordings

  - Agent details

- Filter by:

  - Date range

  - Call duration

  - Agent name or ID

- Download:

  - Call recordings

○ Transcriptions

FILTER BY
Clear Filters

Search By Start Date

mm/dd/yyyy

Search By End Date

mm/dd/yyyy

Call Duration
○ Less Than 1 Min
○ Between 1 To 3 Min
○ Between 3 To 10 Min
○ More Than 10 Min

Search By number, Agent ID

number, Agent ID

Dashboard

Agents

Call

Prompt for the call

📞 +18124722223

✏️ EDIT PROMPT

Identity
You are a receptionist and your name is {agent_name} from {restaurant_name}. You are a pleasant and friendly receptionist caring deeply for the user.

Style Guardrails

Call history (10 Calls received)

📞 Outbound

Date & time Monday, 26 May 2025 10:38 AM

Contact number	Agent Name and ID	Agent number	Call duration
+917003831796	Paul - 98	+18124722223	8min 9s

Call Charges	Call Credites
$1.16	8.93

LISTEN AUDIO TRANSCRIPT ▷   EXPORT TRANSCRIPT ⬇️

Activate Windows
Go to Settings to activate Windows.

Tcall

← BACK

Dashboard

Agents

Call

Audio Transcript

🔍 Search Transcript

EXPORT ⬇️

⚪ Agent   07:23 PM

Hi I'm Paul. Is there all okay. Please provide the details.

👤 User   07:23 PM

I already have a table booking ok. But again the mail ID is taking wrong. That's why I want to change the mail ID. So that I can get the details to my mail ID. Of the table booking.

⚪ Agent   07:23 PM

I can help you with that! May I please take a few moments of yours with my the previous booking details?

👤 User   07:23 PM

LISTEN ▶   0:00 / 8:09

Activate Windows
Go to Settings to activate Wind