User Guide for ICT Agent(Browser Extension)

ICTAgent is WebRTC based agent panel means it is browser based voip softphone that can be integrated with any third party CRM simply entering the CRM URL, username and password.

It will enable all leads or contact numbers with Click to Call, Click to SMS, Click to Whatsapp or Click to Fax capability, CRM user will click on any contact number and default communication channel (Fax,SMS,Whatsapp, Voice) will be used accordingly, When user hover mouse on contact number, there will be option to select any one communications channel or double click to use default communciations channel.

User can click on any number on the webpage and this will present the user with 4 options i.e either they want to connect with them through

1. Call
2. SMS
3. Fax
4. WhatsApp.

It can be integrated with any of the existing CRM.

Install the Extension

- Open the Chrome Web Store.
- Search for the **ICT Agent** Extension in the google web store.
- Click **Add to Chrome**.
- A box will open that lists the data that the extension will be able to access.
- Click **Add Extension** to grant the extension access to your data and install the extension.
- Extension will be installed.
- To use the extension click the icon to the right of address bar in chrome.

Extension Settings

Once the extension is successfully installed, update the extension settings for this:

- Right click on the extension icon.
- A menu will appear like **Search Phone numbers**, **Options**.
- Click **Options**.
- It will redirect you to the Settings page.

Authentication

Enter the Url of communication server i.e Api Url, Username and Password, Test Credentials button. Click the Test Credential button to test your credentials. If all of these fields are valid then a success message will appear and the extensions will be automatically updated. If an error message displays then again fill the required fields with correct credentials.

Select Extension

To get the updated list of extensions click the Refresh button it will load the extensions. Select the Extension. Now all inbound and outbound calls will be handled through this Extension.

Enter URL to load information of incoming and outgoing caller

Enter Url to load caller information i.e the URL of the Customer Relationship management(CRM), so that when the call is connected it will load the particular contact details.

Pattern to search phone number in web pages

Enter Phone Regular Expression to match the Phone pattern on the webpage. So that when you search the phone number it will scan the whole web page and will find the numbers that match the phone pattern given as input and will convert all that numbers into the link.

Search Phone on new web page

If you want to search/scan phone number automatically on the web page, then select the Checkbox.

Automatically open the Phone widget when user click on phone number

If you want to auto load the popup window, upon clicking the phone number then enable the checkbox.

Scan Phone number

You can scan/search Phone numbers by Enabling the **Search Phone on the new web page checkbox** in the **Options** page.

If you want to manually search the phone number on the desired page then you can simply achieve by following these steps:

- Right click the Extension icon.
- Click **Search Phone Number in current Tab**
- It will highlight all the numbres on the page and will make all the numbers clickable.

Open the Web Phone / Popup

- To open the web phone click on the extension icon, it will open the Web Phone Window.
- Enable the checkbox **Automatically open the Phone widget** in options/settings page it will automatically open the Popup window when the number is clicked.

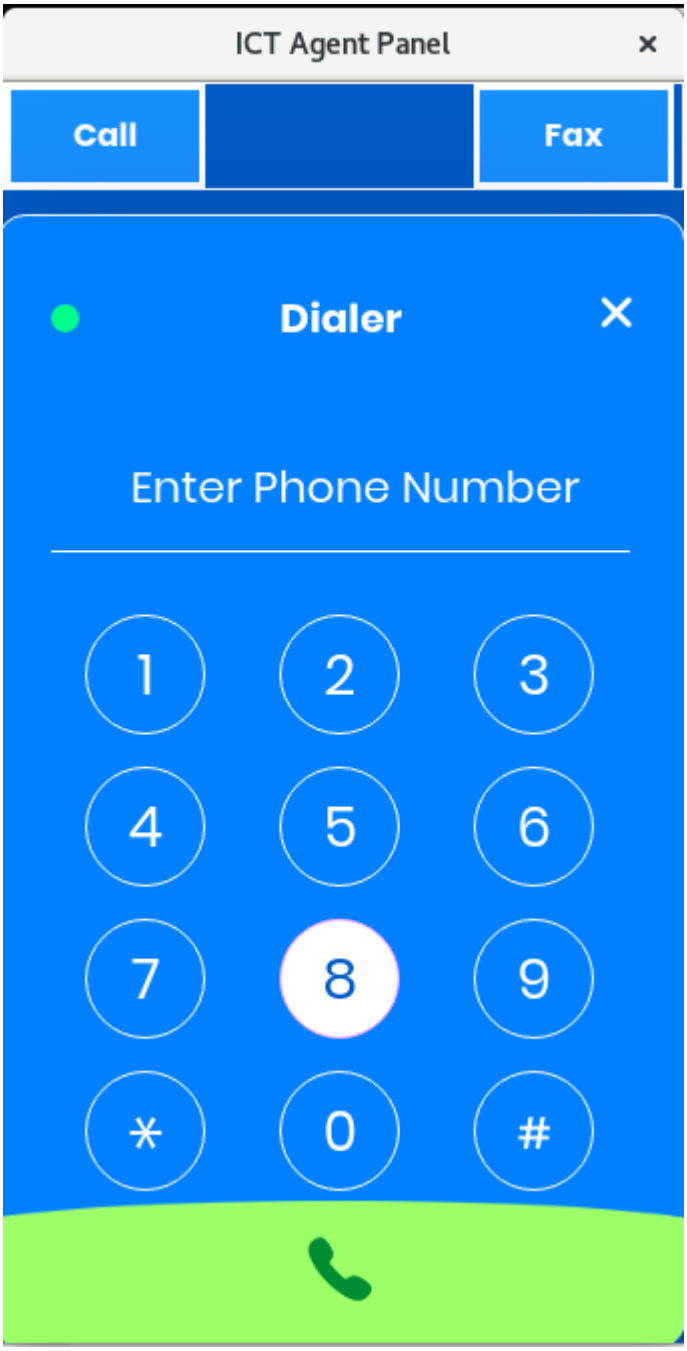
Menu

There are two menus

- **Call**

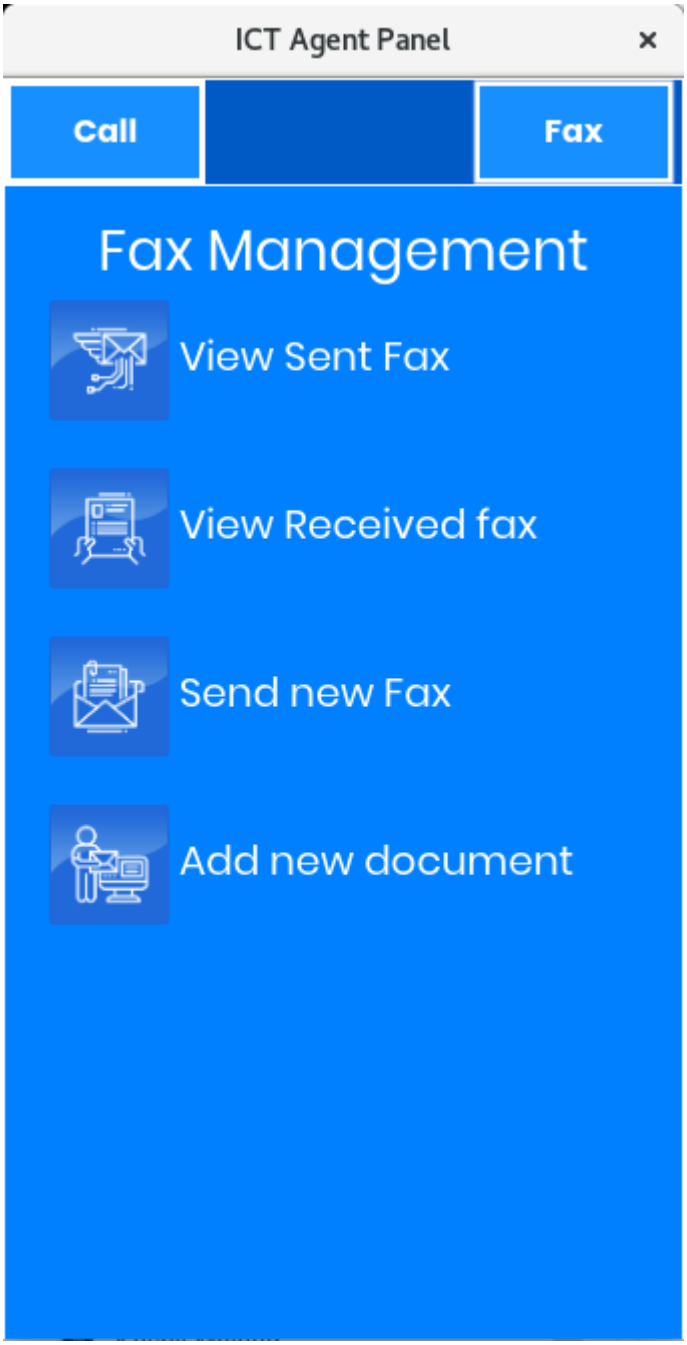
  Through call menu the user can manage the inbound and outbound calls, send DTMF and transfer the calls.

  User has both option either click to call or agent has also numeric keypad to dial any contact manually , the said contact will be saved for future use, during call progress, the agent will have option to accept , reject, send DTMF or transfer the call to any available agent



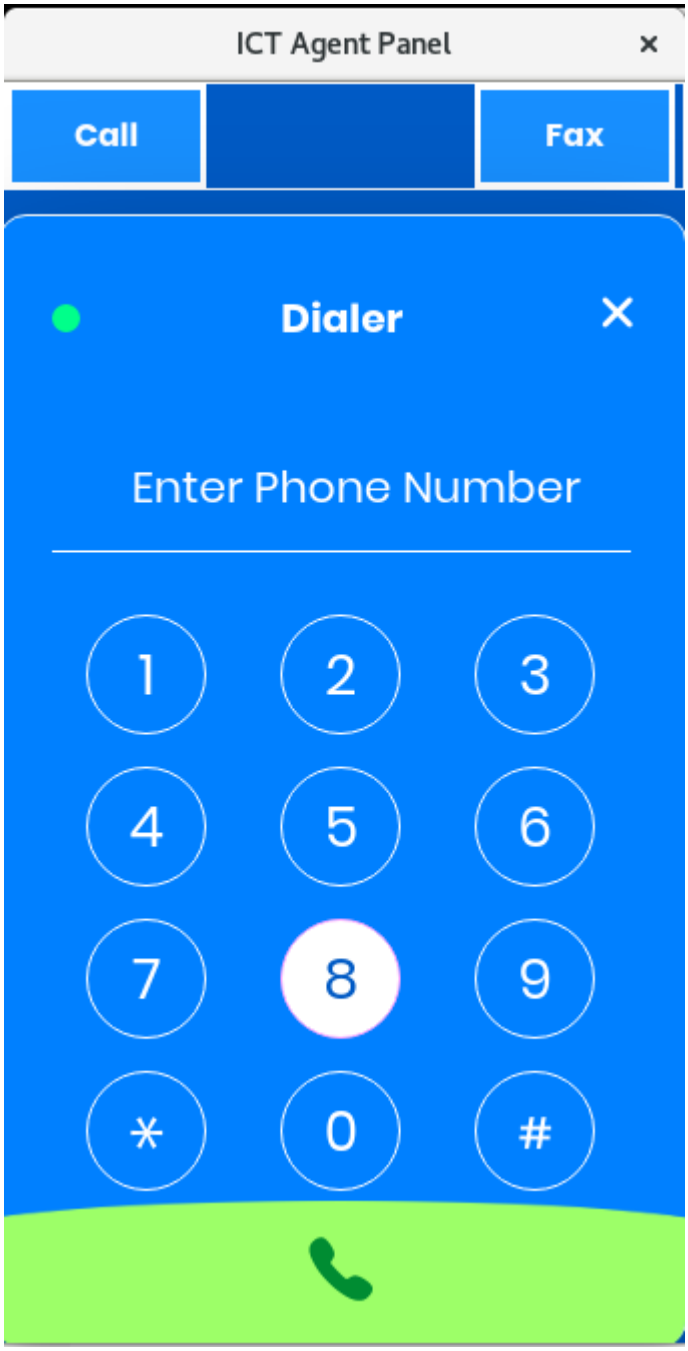
- **Fax**

  Through Fax menu the user can manage the inbound and outbound Fax, send fax to a particular number, add the documents as well.



Make a Call

- To Call the specific number open the **Popup / Phone** Window.
- Enter the number in the input field.
- Click the **Call** button.


ICT Agent Panel
Call
Fax
Dialer
Enter Phone Number
1
2
3
4
5
6
7
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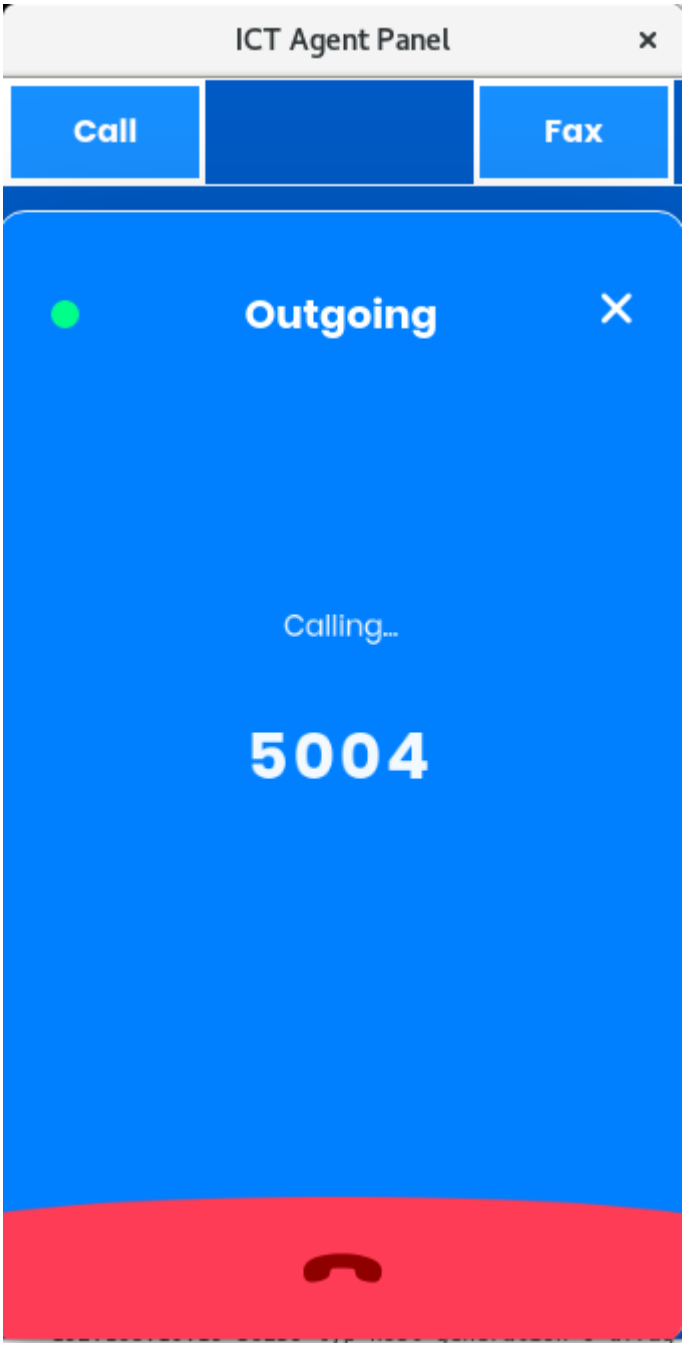
0
#

Outgoing Call

On outgoing call following screen will display



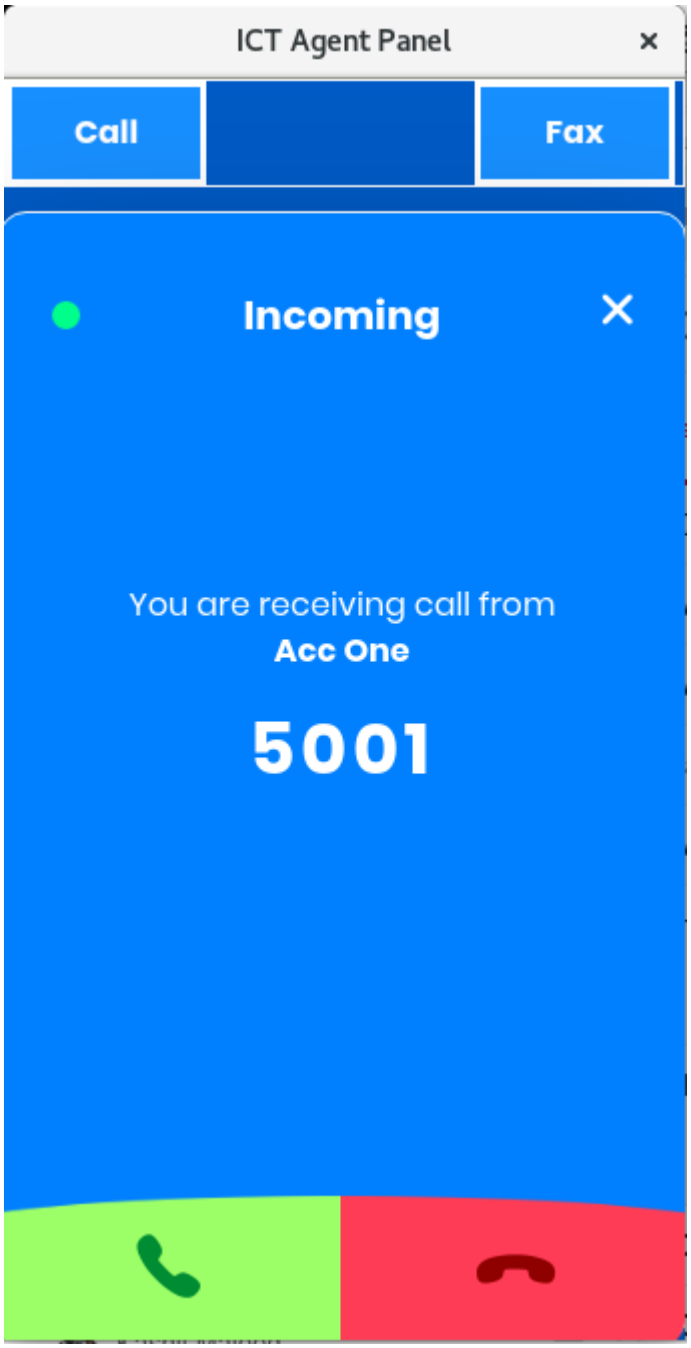
Click 2 Call

To enable Click 2 Call, enable **automatically open the Phone widget** checkbox. Search Phone number and by clicking any number in the web page Phone window will automatically open and will forward the call to the number clicked. OR If the checkbox is not enabled, you can still use this feature by manually opening the Phone window through extension icon in chrome and by clicking the number it will forward call to the number clicked.

Answer an inbound Call

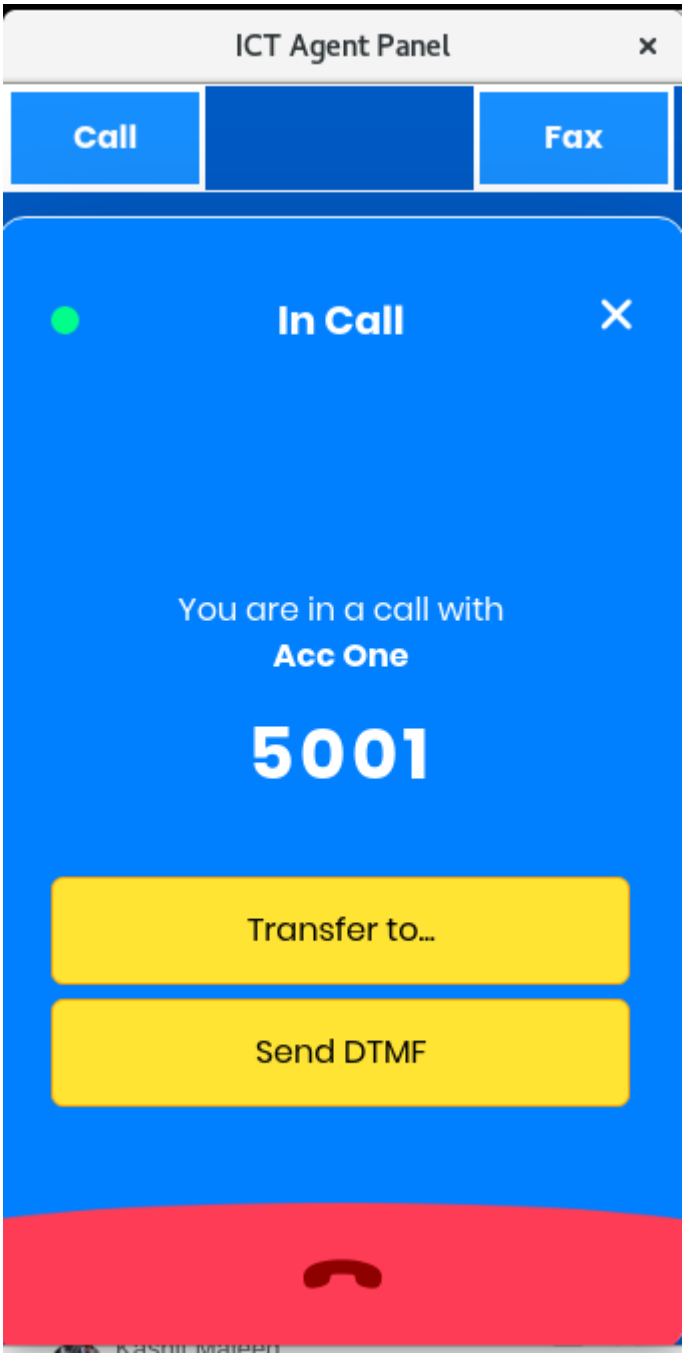
To answer an inbound Call the **Phone / Popup** must be open. On incoming call it will show the Caller name and accept and reject button. To answer the Call Click the **Accept** button and if you want to reject the Call then click the **Reject** button.

You can also open the caller details by clicking the number on the incoming call screen.



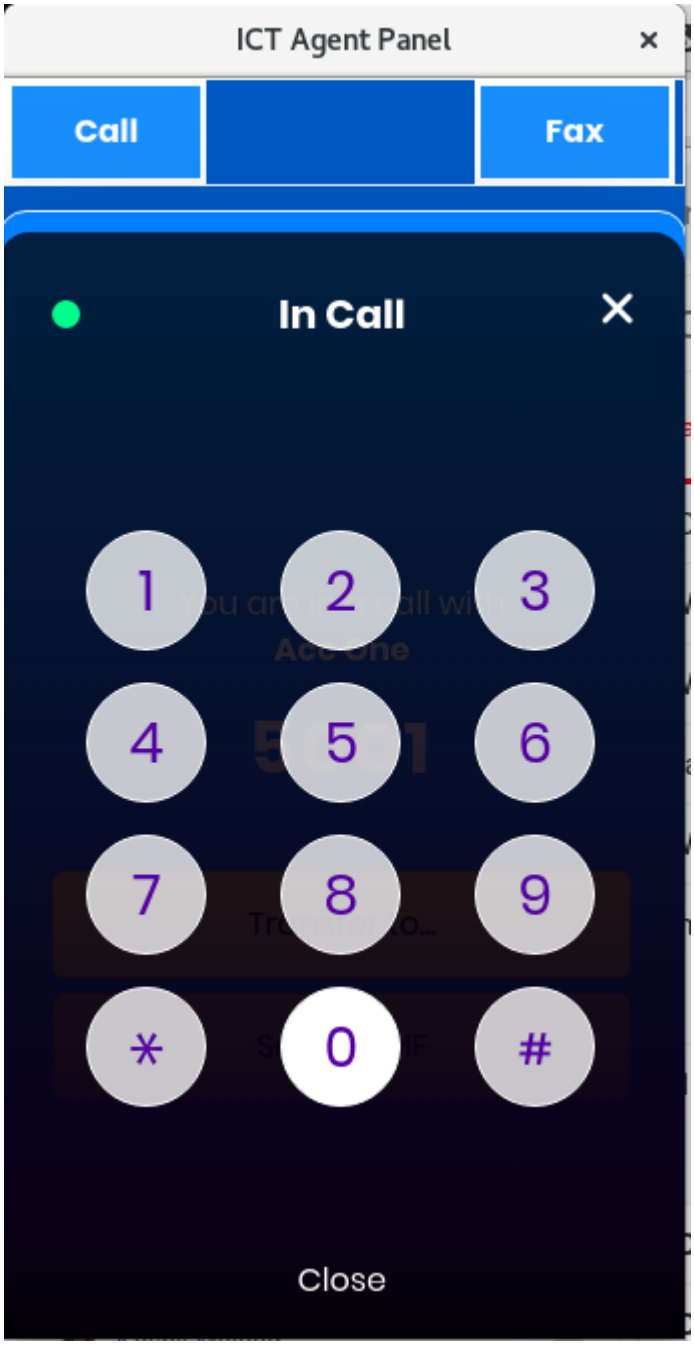
Send DTMF or Transfer

When the call is connected, it has the options to both send DTMF or Transfer Call.



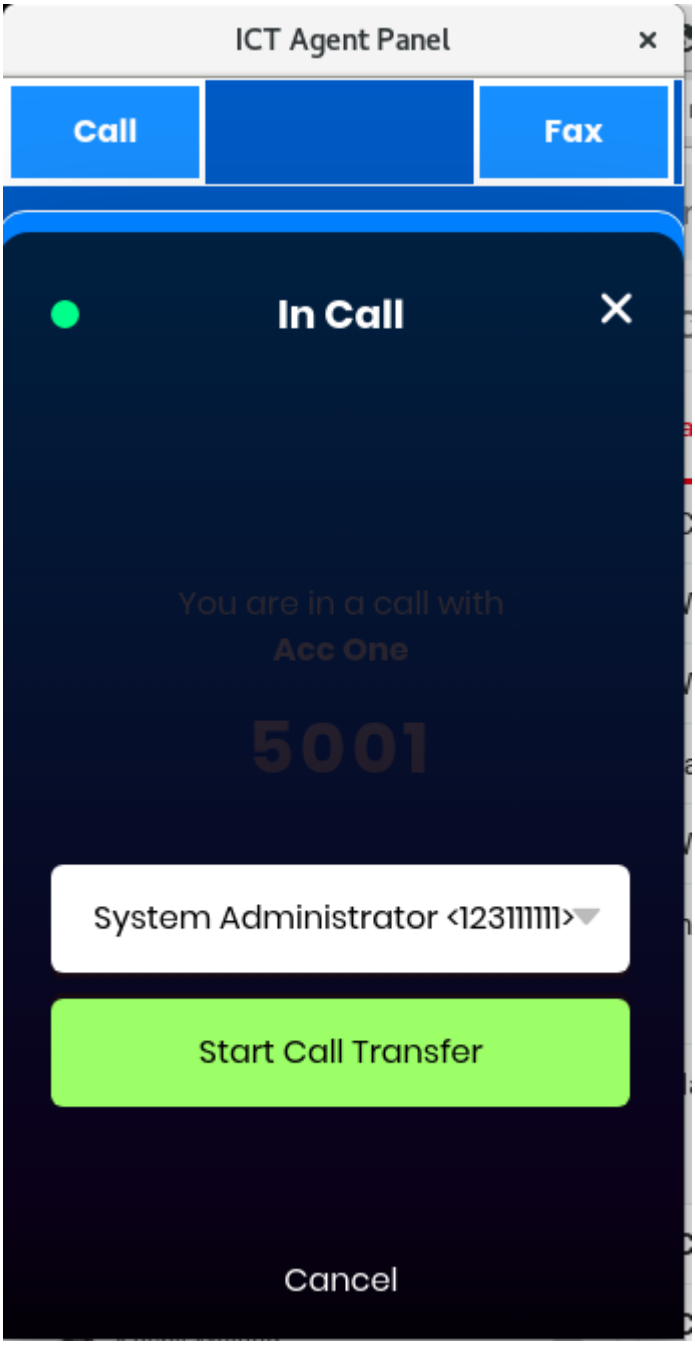
Send DTMF

During surveys and polls when the caller asks you to press the specific key you can use send DTMF buttons to send your response. When the Call is connected, click the send DTMF button, it will open the keypad, click the button in keypad you want to send as DTMF.



Transfer Call

When the call is connected simply click the Transfer to button, a dropdown or a list of agent will appear, select the agent and click the start transfer call and the call will be connected to the agent/extension selected.



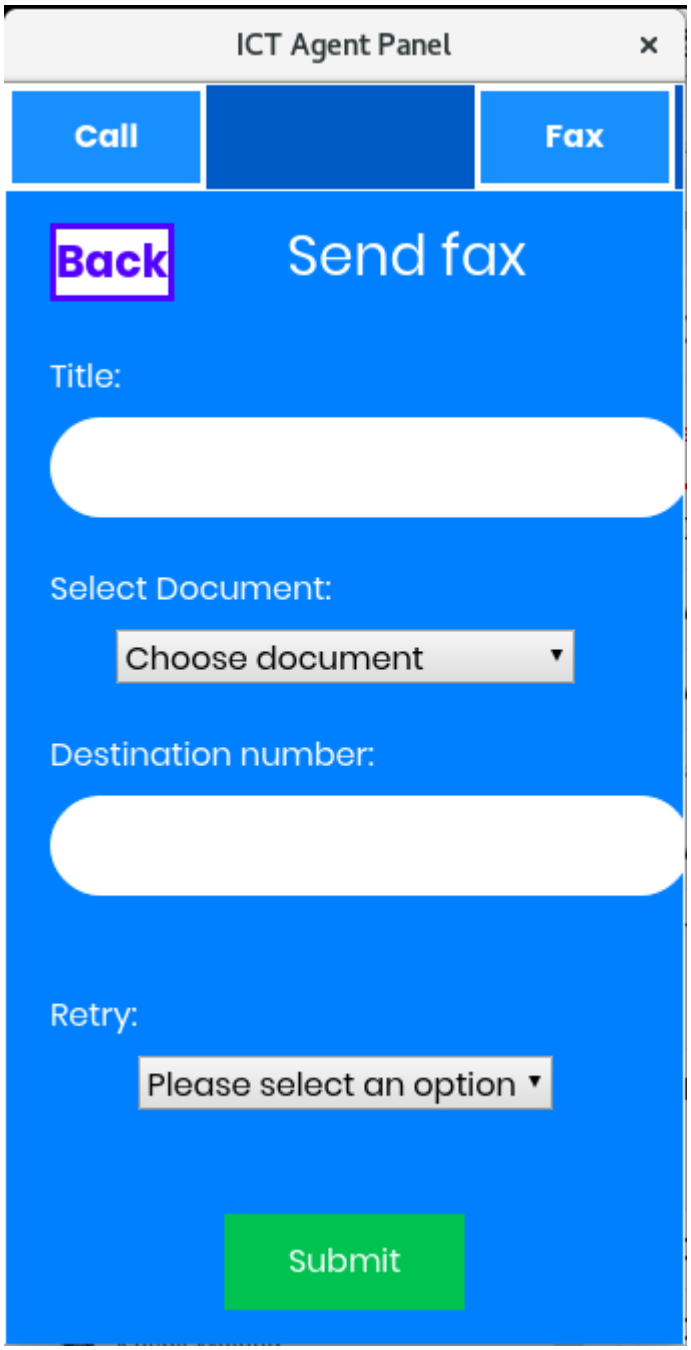
Load the Contact Information

To load the Contact information enter the CRM url in the **Options** page which will load the partciular contact when the call is either connecting or connected. Click the number and it will load the particular contact details.

During Outgoing, incoming and in call click the number label and it will load the particular contact details.

Send Fax

To send the fax to a particular contact switch to the Fax menu and click on the **Send new fax**. You will see the following interface

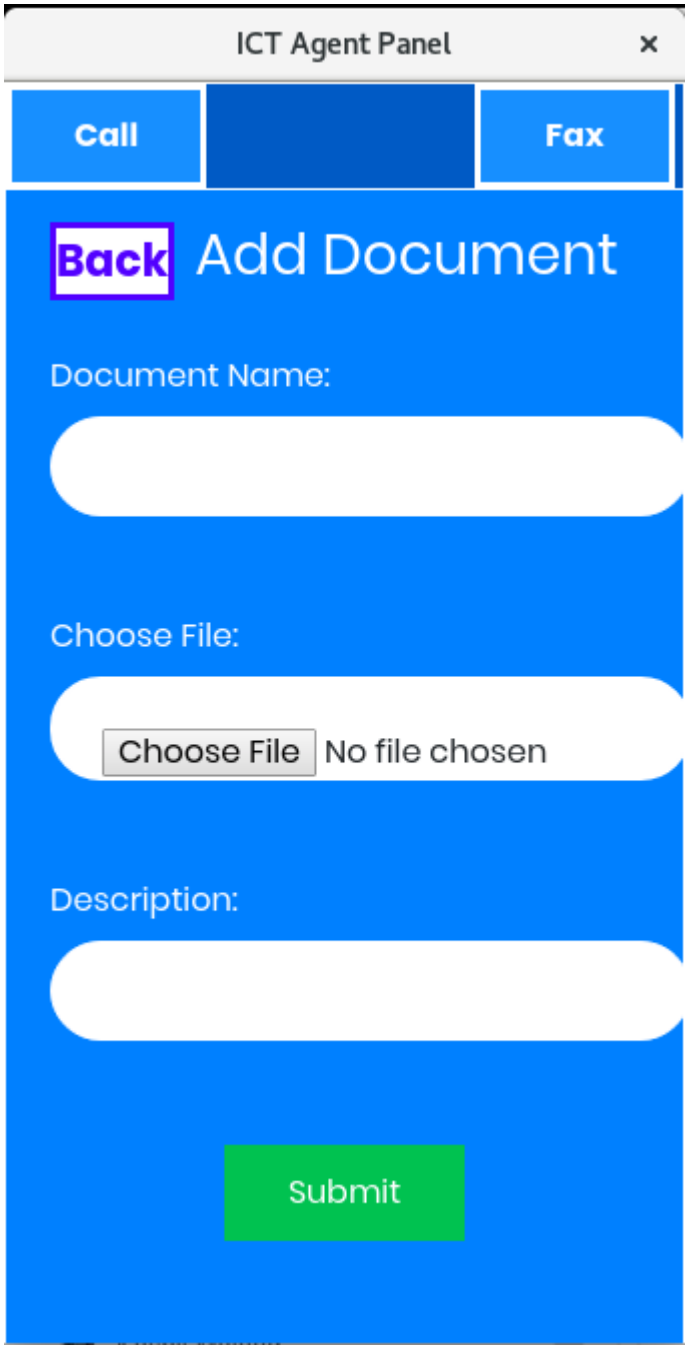


Here enter title, choose document to sent, select the destination number on which you want to send the fax and press submit button.

It will redirect you to the Outbound fax list and the user can see the status of the fax there.

Add Document

To add the new document to the ictfax, firstly open the Fax menu and click on the **Add new document**. You will see the following interface



Here enter the details and click the submit button. New Document will be added successfully

Outbound Fax

To see the outbound fax list , open the fax menu and click on the **View Sent Fax**. It will show you the list of all sent faxes

Inbound Fax

To see the list of received fax, open the fax menu and click on the **View Received Fax**. It will show you the list of all received faxes

Here you can also download the fax document sent by the user.

NOTE

Currently ICTAgent supports fax and voice and we have plans to add SMS and WhatsApp functionality soon.