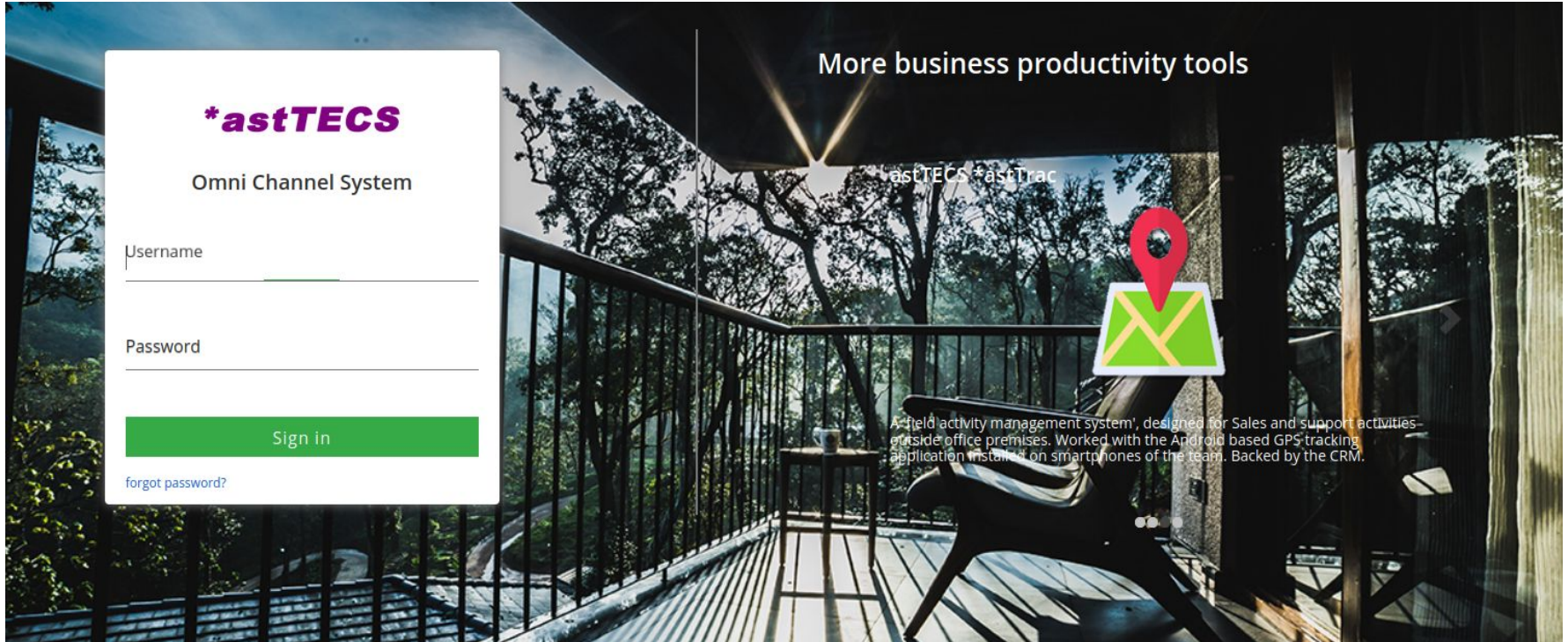


astTECS

Omni Channel CRM

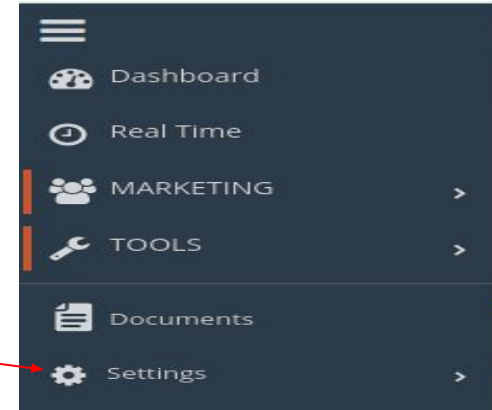
- Login to the Omni Channel CRM with admin credential





Create User

- Click On Setting on Menu button
- Click on Manage User



***astTECS** 🔔 0 ⚙️ 👤 📄 *astTECS

HOME > User Management > Users + Add User 📄 Import 🔍

Search settings

▼ USER MANAGEMENT

- Users
- Roles
- Profiles
- Sharing Rules
- Groups
- Login History

➤ MODULE MANAGEMENT

➤ AUTOMATION

➤ CONFIGURATION

➤ INVENTORY

➤ MY PREFERENCES

➤ INTEGRATION

➤ OTHER SETTINGS

Active Users Inactive Users

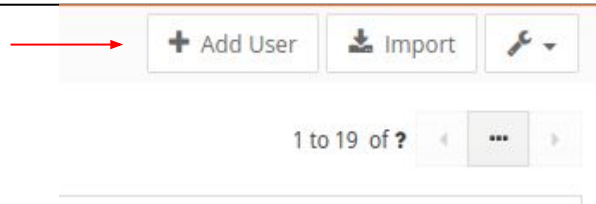
1 to 19 of 19

Actions	Name and Email	Role	User Name	Other Email	Admin	Office Phone
<input type="button" value="Search"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select ...	<input type="text"/>
⋮	astCRM Administrator demo@mailastcrm.com	CEO	admin		Yes	
⋮	ceo ceo support@astcrm.com	CEO	ceo		No	
⋮	Cherry Marcelino cherry.marcelino@daikin.com.ph	Sales Manager	Cherry M		No	
⋮	Syed Imtiaz support@astcrm.com	Sales Person	8553455303		No	
⋮	Cherry Marcelino cherry.marcelino@daikin.com.ph	Customer Support M...	cherry		Yes	
⋮	Mae Arrogante mae.arrogante@daikin.com.ph	Customer Support M...	mae		Yes	
⋮	Nice Pasicolan junice.pasicolan@daikin.com.ph	Customer Support M...	nice		Yes	
⋮	Terry Alejandro terry.alejandro@daikin.com.ph	Customer Support M...	terry		Yes	
⋮	Sarah Teoxon sarah.teoxon@daikin.com.ph	Customer Support M...	sarah		No	
⋮	Joey Barcelona joey.barcelona@daikin.com.ph	Customer Support M...	joey.barcelona		No	

- Click on Add User
- Enter mandatory user details

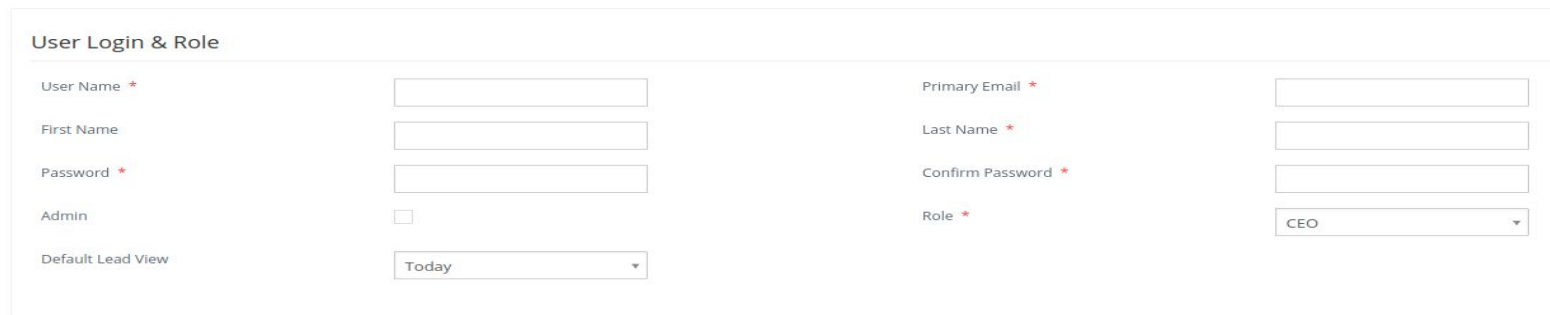
with appropriate Role

Note: asterisk symbols (*) mandatory field



The screenshot shows a top navigation bar with three buttons: '+ Add User', 'Import', and a settings icon. A red arrow points to the '+ Add User' button. Below the buttons is a pagination control showing '1 to 19 of ?' and navigation arrows.

Creating New User



The 'Creating New User' form is divided into two columns. The left column is titled 'User Login & Role' and contains fields for 'User Name *', 'First Name', 'Password *', 'Admin' (checkbox), and 'Default Lead View' (dropdown menu set to 'Today'). The right column contains fields for 'Primary Email *', 'Last Name *', 'Confirm Password *', and 'Role *' (dropdown menu set to 'CEO').

- Enter CRM Phone Extension

CRM Phone Extension



The screenshot shows a red arrow pointing to an empty text input field for the CRM Phone Extension.



User modification

- Click on user details and

More option

- Delete user
- Change user name
- Change Password

Ch

Cherry Marcelino

Edit

More ▾

Delete

Change Username

Change Password

Change Access Key

User Login & Role

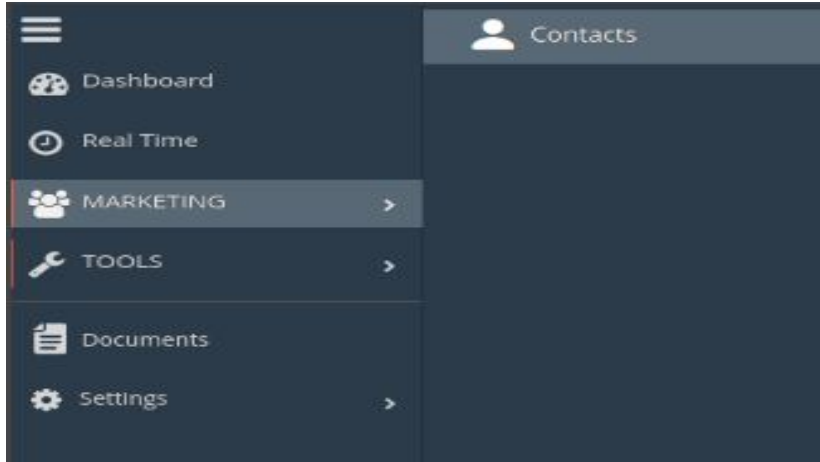
User Name	Cherry M	Primary Email	cherry.marcelino@daikin.com.ph
First Name	Cherry	Last Name	Marcelino
Admin	No	Role	Sales Manager
Default Lead View	Today	Status	Active

Currency and Number Field Configuration

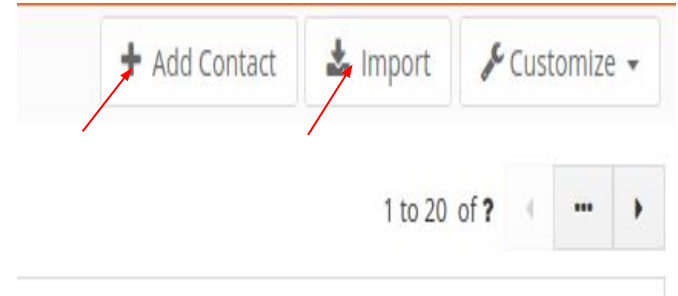
Currency	India, Rupees	Digit Grouping Pattern	123,456,789
Decimal Separator	.	Digit Grouping Separator	,
Symbol Placement	\$1.0	Number Of Currency Decimals	2
Truncate Trailing Zeros	No		

❖ Contact Creation

- Click On Menu > Marketing > Contacts

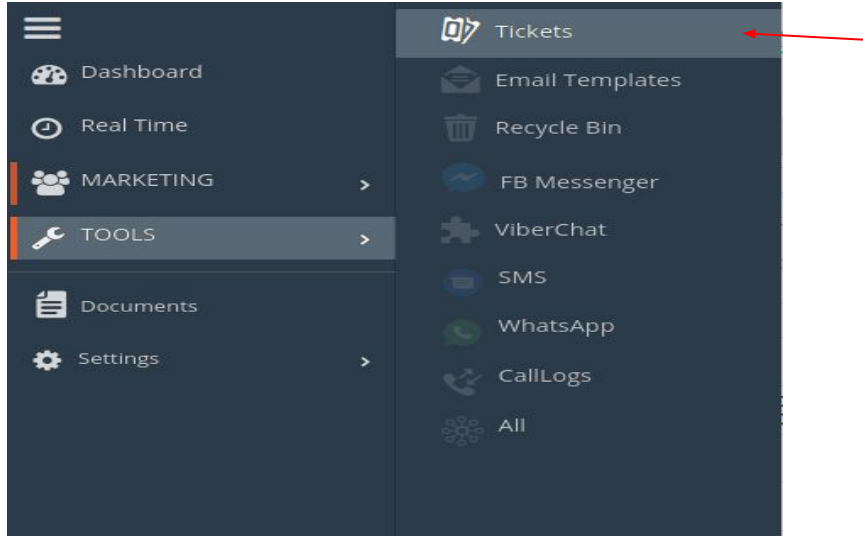


- Add Contact manually or Import Contacts by using .csv format

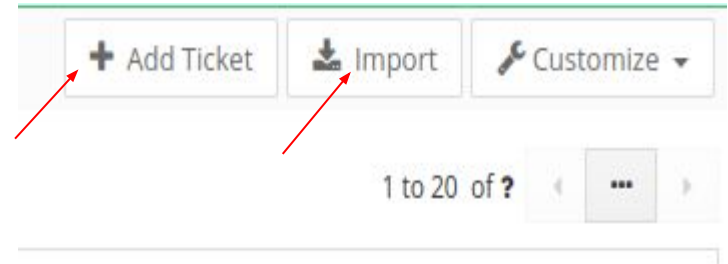


❖ Ticket Creation

➤ Click On Menu > Tools > Tickets



➤ Add Ticket manually or Import Tickets by using .csv format



❖ CallLogs Report

- Click On Menu > Tools > CallLogs
- We can see all call report.

CALLLOGS > All

+

ADD RECORD

📄

IMPORT

🔧

CUSTOMIZE

LISTS

+

Search for List

SHARED LIST

All

TAGS

✎

🗑

More

1 to 20 of ?

<input type="checkbox"/>	<input type="checkbox"/>	Created Time	Source	Destination	Assigned To	Status	Disposition	Duration	Call Type	Rin
<input type="checkbox"/>	<input type="checkbox"/>	19-11-2024 10:09 AM	0811279076	5007	Admin NamPost	NO ANSWER	NO ANSWER	9	Incoming	
<input type="checkbox"/>	<input type="checkbox"/>	19-11-2024 10:06 AM	061278723	5007	Admin NamPost	NO ANSWER	NO ANSWER	15	Incoming	
<input type="checkbox"/>	<input type="checkbox"/>	19-11-2024 09:35 AM	0612013149	5007	Admin NamPost	NO ANSWER	NO ANSWER	6	Incoming	
<input type="checkbox"/>	<input type="checkbox"/>	19-11-2024 09:18 AM	0856406401	5007	Admin NamPost	NO ANSWER	NO ANSWER	10	Incoming	
<input type="checkbox"/>	<input type="checkbox"/>	18-11-2024 3:19 PM	3040	5007	Admin NamPost	NO ANSWER	NO ANSWER	15	Incoming	
<input type="checkbox"/>	<input type="checkbox"/>	18-11-2024 10:26 AM	3092	5007	Admin NamPost	NO ANSWER	NO ANSWER	10	Incoming	
<input type="checkbox"/>	<input type="checkbox"/>	18-11-2024 10:24 AM	3092	5007	Admin NamPost	NO ANSWER	NO ANSWER	1	Incoming	
<input type="checkbox"/>	<input type="checkbox"/>	13-11-2024 4:34 PM	0856406401	5007	Admin NamPost	ANSWERED	ANSWERED	130	Incoming	
<input type="checkbox"/>	<input type="checkbox"/>	13-11-2024 4:31 PM	0856406401	5007	Admin NamPost	ANSWERED	ANSWERED	100	Incoming	



Filter Creation for customized report

- Create filter “Test_Filter” by click plus (+) In calllogs left side and add conditions e.i drops, answered

List Name *

Test_Filter

☒ Set as Default ☐ List in Metrics

Choose columns and order (Max 15)

✕ Source * ✕ Call Type ✕ Destination ✕ Date ✕ Time ✕ Disposition ✕ Duration ✕ Recording

Choose List conditions :

All Conditions (All conditions must be met)

Status

equals

Answered

+ Add Condition

Any Conditions (At least one of the conditions must be met)

+ Add Condition

Thank You