astTECS
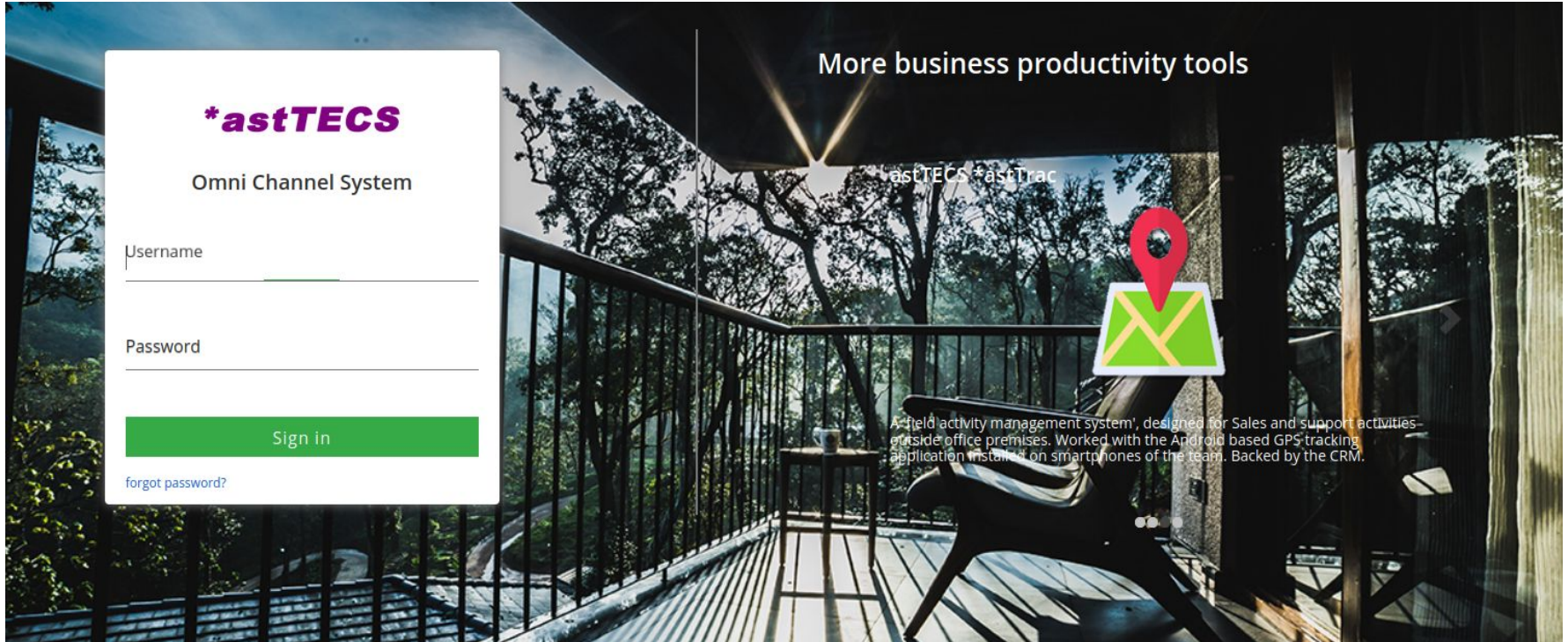## Omni Channel CRM

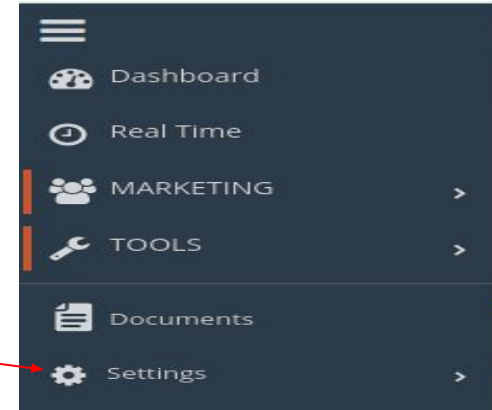- Login to the Omni Channel CRM with admin credential

❖ **Create User**
  ➢ Click On Setting on Menu button
  ➢ Click on Manage User

➢ Click on Add User

➢ Enter mandatory user details
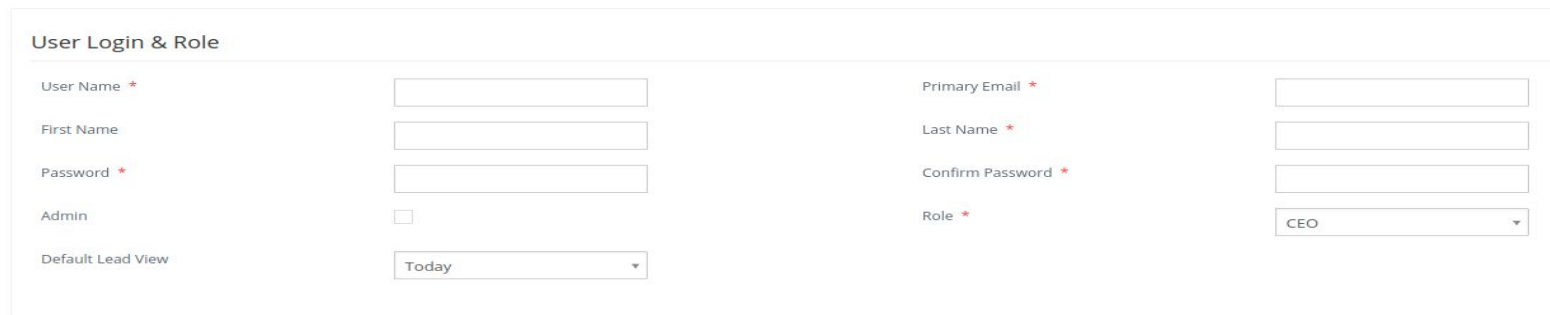
with appropriate Role

Note: asterisk symbols (*) mandatory field

Creating New User

User Login & Role

User Name *		Primary Email *	
First Name		Last Name *	
Password *		Confirm Password *	
Admin	☐	Role *	CEO
Default Lead View	Today		

➢ Enter CRM Phone Extension

CRM Phone Extension

❖ **User modification**

➢ Click on user details and

   More option

➢ Delete user
➢ Change user name
➢ Change Password

Cherry Marcelino [Ch]

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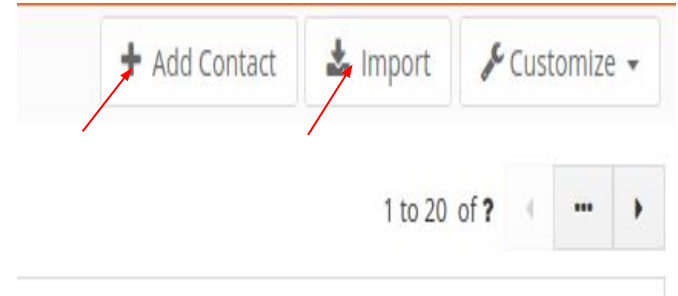
Currency	India, Rupees	Digit Grouping Pattern	123,456,789
Decimal Separator	.	Digit Grouping Separator	,
Symbol Placement	$1.0	Number Of Currency Decimals	2
Truncate Trailing Zeros	No		

❖ **Contact Creation**
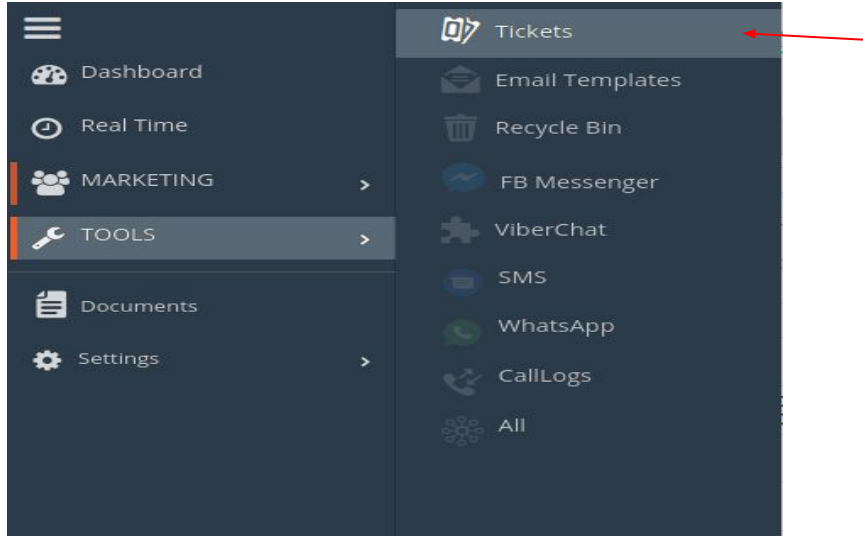 ➢ Click On Menu > Marketing > Contacts
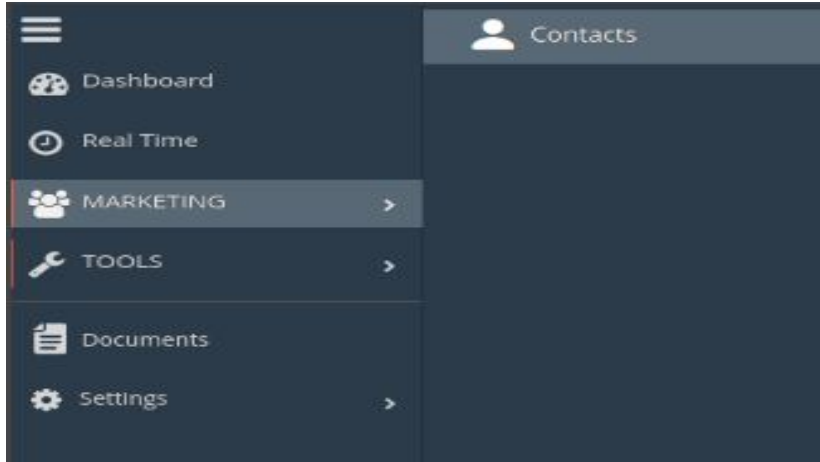
➢ Add Contact manually or Import Contacts

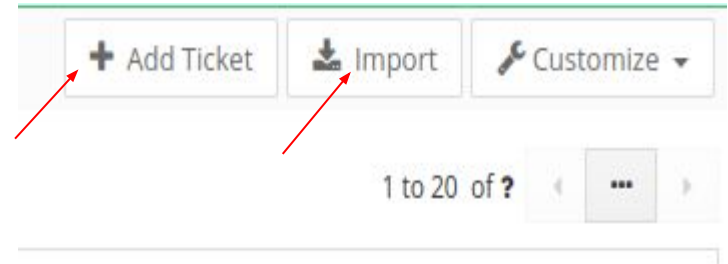by using .csv format

❖ **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.

❖ 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