



Mahindra : Technical Document

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Document Revision History

This table holds record of signification changes made to the document.

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author** | **Description of change** |
| 1.0 | 07/11/2017 | Pratik Prajapati | Technical Document |

1. Company Details

Company name:

City:

State:

Country:

Address:

1. Project & Client Details

**Clients Details**:

**Client Name:**

**Contact Person:**

**Project Details:**

1. Git Repository

**Server**: http://14.143.27.118:2001

**Link :** http://14.143.27.118:2001/elision-dialer/

**Git clone link:**

1. Roles And Responsibility

|  |  |  |
| --- | --- | --- |
| **Sr No.** | **Role** | **Responsibility** |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |

1. Initial Requirement

## Dialer Setup :

Elision provided solutions for 100 seat inbound and outbound Dialer.

## Email Module :

### Agent Can send Email from Agent Panel (Bulk Email is Not Available)

### We will use SMTP to send emails.

## SMS Module :

### Agent Can send SMS from Agent Panel.

### Manager can select list & send SMS to entire list for bulk SMS.

### We will use SMS Gateway API to send SMS.

## Feedback IVR :

We provided additional feedback IVR module to get the rating of our services.

## Voice Broadcasting solutions :

Elision provided solutions to send predefine voice message to customer number.

## DNC Module :

DNC (Check) (In build Feature‐Need to integrate External API of DNC).

## Data Push API from 3rd Party Vendor to Specific Campaign (In build Feature)

## API Integration :

### Customer will click on CALL ME / HELP button on the website account.

### Website will call our API and pass below details

* Customer Name
* Customer Phone
* Transaction ID

### Data will be stored in a campaign and call will be dialed immediately to the customer and all the above details will be shown on agent screen.

### Once the data is inserted in a campaign server will send SUCCESSFUL OR UNSUCCESSFUL Response.

### After the call has been dialed transaction id, customer name and customer phone will be available in daily status report

### Report for API log insertion with Successful or Unsuccessful response will be available, which will show data for one day only.

## CRM API Integration :

### Receiving of data from Siebel to Dialshree dialer and vice versa will be done through API in SOAP format. To use SOAP format need API document with an example from Siebel team.

### Dialshree will have all the list of fields on agent screen. Extra fields which are not available in dialshree will be available in Custom tab form.

### Phone number on agent screen need to be masked. Need to show only last 4 digit number.

### Fields which required drop down value like : Age, City, Marital status will have static data.

### Data need to send back to Siebel for connected and non-connected calls. This data will be send on real time basis for both connected and non-connected calls.

### Leads will be dialed on priority basis i.e New, Followup / Callback and then rest of the disposition.

### For not-connected calls each leads need to be dialed 3 times a day with a gap of 2 hours of time and as per the call count business logic.

### Call Hangup, Disposition, Call transfer, Manual dial all this features will be used from agent screen itself.

### Dialer will inactivate all the not-connected numbers from dialer after 90 days.

### Below are the explanation of fields which needs to be send to Siebel after call : a. Lead Status : Last status of call whether Connected or Not-Connected b. Call Status : Call status is disposition of call c. Lead Owner : If Call is connected then it will be agent name, if call is not connected then it will be list id d. Total no. of call attempts : Total number of attempts done to dial e. No. of call attempts : After changing disposition how many time call has been dialed for a lead.

### There is no validation to be done on agent screen while call Hangup and disposition.

## Customized Report :

### NQ campaign wise.

### Verification report

### Graphical representation of the Report

### Call centre verification with Rechurn

### Call centre verification for this month alone

### Automated call centre

### Web lead over all call summary for the hour

### Web lead over all TSR perf summary for the hour

1. Additional Requirement

