Brekeke CRM

Version 2.7

Administrator's Guide

Brekeke Software, Inc.

Version

Brekeke CRM v2.7 Administrator's Guide

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1. Introduction

Brekeke CRM is a customer management application that integrates and works together with Brekeke Customer Interaction Manager(Brekeke CIM). You can manage customers by defining multiple workspaces on the application, each with a different schema. Additionally, you can define multiple projects on the workspace similarly and manage customer information in its own project scope for each customer on the workspace.

As one of the major features, Brekeke CRM optionally provides a dialer feature which allows you to perform an outbound campaign using the phone list from each project.

Brekeke CRM provides the following features:

Basic Features	Multi-Tenant feature Security feature using IP Access Filtering Error and access log output User access control Banned telephone number list Project screen for agents Talk-Script player feature
CRM Features	Import/Export of customer information in CSV format Define customer status Customize customer information fields Customize project result fields Customize project screen layout Inbound/Outbound Development feature Call Scheduling feature View processing stats for each project.
Dialer Features[i]	Predictive, Progressive, Preview Dialing Feature Direct import of customer data to a call list. Import of non-customer data to a call list Bulk Suspend of call list records Redial Scheduling feature Configure detailed conditions for automatic redial Agent Assignment during the Preview Dialing

[i]Depending on the edition you are using, this feature may not be available.

2. Installation

2.1. System & Software Requirements

Followings are the pre-installation requirements for Brekeke CRM:

CPU	2 GHz or above (Multi Core Processor Recommended)
Memory	4 GB minimum
OS	Microsoft Windows 7 or later, Red Hat Linux
Java	Java SE 7 or later (Java by Oracle Recommended)
Apache Tomcat	Version 6.0.20 or later
Database	MySQL 5.5 or later
Brekeke CIM	Version 2.7.0.0 or later

2.2. Installation Steps

2.2.1. Installing Brekeke CIM

Install Brekeke CIM following the Brekeke Customer Interaction Manager Administrator's Guide. Brekeke CRM and Brekeke CIM are installed on a separate machine normally, however, they can be installed on the same machine.

2.2.2. Installing Java SE

1) Install JDK or JRE.

✓ *When Brekeke CRM and Brekeke CIM are installed on the same machine, this step is not necessary.*

2.2.3. Installing Tomcat

1) Access Apache Tomcat website(http://tomcat.apache.org/index.html) and download the appropriate version of Tomcat for your environment.
2) Set the environment variable JAVA_HOME to the path where you installed JDK or JRE.
3) Install downloaded Apache Tomcat

✓ *We recommend adding liveDeploy="false" to <Tom Cat Install Destination directory>/conf/server.xml file to avoid causing unnecessary errors.*

```
<Host name="localhost" appBase="webapps"
      unpackWARs="true" autoDeploy="true" liveDeploy="false"
      xmlValidation="false" xmlNamespaceAware="false">
```

✓ *In CRM, large configuration data may be uploaded, please pay special attention to Tomcat's POST size limit. This can be changed by specifying maxPostSize in Connector in server.xml.*

✓ *When Brekeke CRM and Brekeke CIM are installed on the same machine, this step is not necessary.*

2.2.4. Installing Database

1) Install database. Please refer to the instruction manual provided by the manufacture for instruction on how to install the database.

✓ *In CRM, large configuration data is stored in the database. Depending on a database vender, the sendable packet length might be limited as a default. For MySQL, this can be changed by specifying the max_allowed_packet.*

2.2.5. Installing Brekeke CRM

1) Place crm.war file to "webapps" directory found in the Tomcat Install directory.

2.2.6. Starting Tomcat

1) Start Tomcat.
2) Open a web browser and specify the URL http://localhost:8080 (If you chose a port number other than the default "8080", specify the appropriate port number in the URL.)
3) Tomcat has been started successfully if the Apache Jakarta Project page is displayed.

2.2.7. Confirming the access to Brekeke CRM

1) Open a web browser and point to http://localhost:8080/crm/ and verify you can access to the Admin page (If Tomcat is not running in "8080", please change the appropriate port number).
2) In order to perform the initial system configuration, [Database] page will be displayed.

2.3. Initialization Steps

2.3.1. Activating License

1) Paste the Product ID in the text box
2) After clicking [Activate] button, please follow the instructions on the screens to complete the activation.
3) When the activation is completed, you will proceed to CRM Initialization Configuration page.

2.3.2. Initializing Database

1) Enter necessary information such as database name from the database settings page and perform initialization.

2) When [Save] button is clicked on the database page, you will proceed to CIM page.

2.3.3. Registration to CIM

1) Enter the Brekeke CIM URL in the CIM URL field on CIM page and save.
[Example: http://192.168.0.1:8080/cim]

2.3.4. Configuring Tenant Name (single tenant version)

1) Specify the tenant name from Brekeke CIM in Brekeke CRM. After the tenant is configured, the user is logged off.

2.3.5. Configuring Brekeke PBX

1) Add the following properties to [PBX Admin] > [Options] > [Advanced] in Brekeke PBX.
com.brekeke.tel.sip.SipTelephone.DEFAULT_TERM_CODE=408
This is required to retrieve the call result "Not Answered" in Brekeke CRM Dialer feature.

2.3.6. Configuring Brekeke CIM

1) Add the following properties to [Administrator Menu] > [Settings] > [Advanced Options] in Brekeke CIM:
callstate.incoming=true
callstate.incoming.page=true
This is required in order to enable the status of the incoming call.

2.4. Integration with Brekeke CIM

Brekeke CRM integrates and works together with Brekeke CIM.

The integration URL of Brekeke CRM needs to be specified in the Application URL field in DNIS settings in the Brekeke CIM as the application to integrate when an external call is received.

If you wish to use the dialer feature, the Brekeke CRM integration URL needs to be specified in the ACD settings of the phone book application section and the dialer setting needs to be enabled.

When Brekeke CRM and Brekeke CIM are installed on a separate machine(different domain or port seen from client), however, you are required to add Access-Control-Allow-Origin setting to Brekeke CIM.

2.4.1. Configuring DNIS in Brekeke CIM

1) Login to Brekeke CIM.

2) Open and Edit the DNIS you wish to integrate with Brekeke CRM.
3) Click [Application URL] field and select Brekeke CRM.
URL is displayed in the format of “http://tomcat-address:tomcat-port/crm/agentInitUI?loginkey=#loginkey#”
[Example: http://192.168.0.2:8080/crm/agentInitUI]
4) After the configuration above is done, Brekeke CRM project page will be integrated when the incoming calls are received by this DNIS.

2.4.2. Configuring ACD in Brekeke CIM

1) Login to Brekeke CIM.
2) Open and Edit the ACD you wish to integrate with Brekeke CRM.
3) Click on the [Phonebook Application URL] field under the Dialer settings and select Brekeke CRM.
URL is displayed in the format of “http://tomcat-address:tomcat-port/crm/startDialer”
[Example: http://192.168.0.2:8080/crm/startDialer]
4) If you set the Dialer setting [ON/OFF] to ON, the setting will be enabled thus the dialer feature of Brekeke CRM will be enabled for the ACD.

2.4.3. Configuring Access-Control-Allow-Origin setting in Brekeke CIM

1) Login to Brekeke CIM and open [Settings] > [Security] page.
2) Add the domain of Brekeke CRM in the [Access-Control-Allow-Origin Settings] list box.
Enter using the format “http://tomcat-address:tomcat-port”
[Example: http://192.168.0.2:8080]

✓ *When Brekeke CRM and Brekeke CIM are installed on the same machine, this step is not necessary.*

2.5. Integration with Brekeke Recording File Server

Brekeke Recording File Server (RFS) Integration allow you to replay the recording files from the Brekeke CRM Contact History screen.

2.5.1. Installing Brekeke Recording File Server

Please install Brekeke Recording File Server.
Please refer to RFS documentation for RFS installation procedure.

2.5.2. Configuring Brekeke Recording File Server in Brekeke CRM

1) Login as System Administrator to Brekeke CRM.

2) Open [Configuration] > [RFS] from the menu and configure the recording file server settings. (Please refer to Configuration > RFS)

3. Maintenance

3.1. Version Updates

Follow the steps below to update Brekeke CRM to a newer version.

1) Login to Brekeke CRM, go to [Maintenance] > [Software Update] screen
2) After selecting the war file, click [Update] button to start the application updates.
3) Restart the application server to complete the updates.

3.2. Uninstallation

Stop Tomcat and remove the installed war file (e.g., crm.war) and the directory with same name without the extension from webapps directory. For uninstalling other applications and database, please follow the uninstall instructions provided from each vendor.

4. Administrator Menu (Multi-Tenant Edition)

These menus appear only when logged in as a system administrator in Brekeke CRM Multi-Tenant Edition.

4.1. Tenants

4.1.1. Tenants

Displays the list of tenants created on Brekeke CRM.

When creating a new tenant, specify the tenant ID that has been created in Brekeke CIM as tenant name.

When the tenant name is clicked, you will be taken to the main menu for the tenant.

4.2. Logs

4.2.1. Error Logs

Error information that occur within the system are displayed.

Similar page exists in the main menu, however, here it displays errors for the overall system. For more details, please refer to “Main Menu > Logs > Error Logs”

For more details, please refer to “Main Menu > Logs” section in this document.

4.3. Settings

4.3.1. System

Perform a basic configuration of the system.

This page configures the Field of Brekeke CRM “Main Menu > Settings > System” page that are common to all tenants.

For more information please refer to “Main Menu > Settings” section in this document.

4.3.2. RFS

Configure settings for integration with Brekeke Recording File Server(Brekeke RFS).

“Main Menu > Settings > RFS” page allows you to configure the RFS integration settings for each tenant, however, this setting will be applied if not configured.

Setting method is the same “Main Menu > Settings > RFS” page in the Brekeke CRM Single-Tenant Edition.

For more details, please refer to “Main Menu > Settings” section in this document.

4.3.3. Security

Configure security settings for all tenants.

In addition to the security set in this page, “Main Menu > Settings > Security” page allows to configure the security settings for each tenant.

Setting method is the same “Main Menu > Settings > Security” page in the Brekeke CRM Single-Tenant Edition.

For more details, please refer to Main Menu > Settings section in this document.

4.3.4. Others

Other Settings tab menus are the same as Brekeke CRM Single-Tenant Edition.

For more details, please refer to “Main Menu” section in this document.

5. Main Menu

5.1. Workspaces

5.1.1. Workspaces

Displays a list of workspaces.

You can create a new workspace using [New] button.

Clicking the workspace name will take you to the workspace menu and clicking the project name will take you to the project menu.

The list can be filtered by specifying the filters:

Field	Description
Workspace Name	Filter by Workspace Name
ACD	Filter by ACD columns
State	Filter by the state of workspace
Sort	Specify the sort order of workspaces to display.
Update List	Refresh the list of workspace with the specified criteria.

5.2. Scripts

5.2.1. Scripts

Displays a list of scripts.

You can create a new script using [New] button and edit the script name by clicking the script name.

In the Execute Script section of the create new script or edit script page, you will be able to execute the script that is being displayed.

Field	Description
Script Name	Displays the script name. Unable to modify after it has been created.
Description	Specify the description of the script name.
Script	Write scripts in JavaScript
Execute Script	
Function Name	Specify the function name from the script being viewed.
Parameter 1 - 5	Specify the string.

5.3. Logs

5.3.1. Error Logs

Displays a list of error logs. You can filter the logs by the specified date using the [Search] button.

Field	Description
Event Time	The date and time when error occurred.
Error Code	Type of error
Memo	Display error details by clicking on the field

- ✓ *With Brekeke CRM Multi-Tenant Edition, access this page from [Administrator Menu > Logs].*

5.4. Settings

5.4.1. System Options

Configure the basic settings for tenants.

Field	Description
General	
Tenant Name	Displays a tenant name.
Description	Specify the description for the tenant.
Log Expires(days)	Specify in days for how long logs should be kept. The expired logs are deleted when the date changes or at the server restart.
User	Specify a user name for Brekeke CRM Administrator user.
Password	Specify password for the Brekeke CRM Administrator user.
Announcements	
Announcements	Specify the announcement texts that display on the list of projects page on agent page.

- ✓ *In Brekeke CA Multi-Tenant Edition, some fields are displayed in [Administrator Menu > Settings]*

5.4.2. Database

Configure database connection settings for Brekeke CRM. Clicking the [Initialize Database] button takes you to the database initialization page.

If database was initialized on the Database Initialization page, each field has already been configured to the appropriate values automatically.

Field	Description
Driver Class	Specify the class name of the JDBC driver being used.
URL	Specify the URL of database being connected from JDBC.
User	Specify a user name being used by JDBC connection
Password	Specify password being used by JDBC connection

✓ *In Brekeke CRM Multi-Tenant Edition, this page can be accessed from [Administrator Menu > Settings].*

5.4.3. Initializing Database

Initialize database. Clicking on the [Initialize] button will create and initialize the database. [Cancel] button will take you back to the Database page.

Field	Description
Database Server	
IP Address	Specify the IP Address of the database server
Port	Specify the port number of the database server (default: 3306)
Database	
Database Name	Specify a database name that is being created/initialized.
User Name	Specify the User ID that is being created to access to the database.
User Password	Specify password for the user being created.
Database Administrator	
Administrator User	Specify the ID of database administrator for the database.
Administrator Password	Specify the password of database administrator for the database.

5.4.4. CIM

Enter the URL for Brekeke CIM and perform the registration to Brekeke CIM.

If the registration has been done during the installation then this does not have to be done again. If the URL of Brekeke CIM changes, you will need to re-register the URL.

[Example: http://192.168.0.1:8080/cim]

✓ *In Brekeke CRM Multi-Tenant Edition, this page can be accessed from [Administrator Menu > Settings].*

5.4.5. RFS

Configure the integration with Brekeke Recording File Server.

If configured, the call audio files can be downloaded from the contact history page if available.

Field	Description
General	
Integrate with Recording File	Specify whether or not to integrate with Recording File Server.

Server	
Recording File Server Settings	
Recording File Server URL	Specify the URL for Brekeke RFS Server. [Example: http://192.168.0.4:8080/rfs/gate]
JDBC Driver Class	Specify the class name of the JDBC driver being used.
JDBC URL	Specify the URL of the JDBC driver being used.
JDBC User	Specify the user name being used by JDBC connection
JDBC Password	Specify the password being used by JDBC connection

5.4.6. Security

Configure the access control for Brekeke CRM tenant.

Field	Description
IP Settings for Users	
IP Settings for Applications	
Default	Configure the default setting for users and applications to access to Brekeke CRM. When [Allowed] is set, all the ip addresses are allowed to access CRM except those who are accessing from the forbidden IP addresses. If [Forbidden] is set, all the IP addresses except those who are accessing from the allowed IP addresses are forbidden to access to CA.
ForbiddenIP/AllowedIP	Specify forbidden and allowed IP Addresses.

5.4.7. Timezone

Configure the timezone used by the Dialer.

In Brekeke CRM, if timezone is defined, the dialer calling hours can be limited for each are code in Project Settings.

Field	Description
Timezone Settings	
Local Timezone	Displays local timezone of the environment where Brekeke CRM is running
Timezone	Select timezone to define
Caption	Configure Caption for Timezone
Area Code(CSV)	onfigure the patterns of call numbers in the Regular Expression.

	Multiple patters can be configured and can be entered using the CSV format.
Delete	Delete Timezone definition
Add Timezone	Add Timezone definition

✓ *In Brekeke CRM Multi-Tenant Edition, this page can be accessed from [Administrator Menu > Settings].*

5.4.8. Advanced Options

Configure advanced settings for the operation of Brekeke CRM. Write in the format “Setting Field=Setting Value”.

- ✓ *In Brekeke CRM Multi-Tenant Edition, this page can be accessed from [Administrator Menu > Settings].*

web.lang

Specify display language.

Japanese:ja, English:en, Chinese:zh

customer.delete.logical

Specify the delete method of the customer.

Logical Deletion:true Physical Deletion:false. The default is set to false。

customer.delete.delay.days

Specify the delay in days until the actual deletion execution during the physical deletion of customers. The default is set to 0.

preview.reserve.gc.delay.days

Specify the delays in days until the actual deletion execution of the expired preview dialing scheduling. Specifying -1 will not delete. The default is set to -1.

preview.reserve.crm.enabled

Specify whether to use the preview dial reservations at the time of incoming and outgoing calls in general.

Valid: true, Invalid: false. The default is set to true.

preview.reserve.dialer.enabled

Specify whether to use the preview dial reservations for the calls from dialer.

Valid: true, Invalid: false. The default is set to false.

agentui.screen.clear.auto

Specify whether to automatically clear the agent screen when the contact results are saved.

Clear: true, Do not clear: false. The default is set to true.

script.readonly.tenant.user

Specify a user who can edit the scripts for the Multi-Tenant Edition

Only System Administrators: true, System Administrators and Tenant Administrators: false.

The default is set to true.

agentui.screen.contact.max.records

Specify the number of contact history to be displayed on the agent screen.

The default is set to 20.

agentui.screen.callresult.max.records

Specify the number of dialed call history to be displayed on the agent screen.

The default is set to 10.

dialer.stop.auto

Specify whether to stop the dialer automatically when finished dialing all the calls.

Stop: true, Do not stop: false. The default is set to true.

export.text.charset

Specify the text character set when data is exported.

export.text.charset = <Charset String supported in Java>

export.separate.value.multiselect

Separate the Select List(hierarchy) values per field when exported.

Separate:true, Do not Separate:false. The default is false.

agentui.show.unuse.panels

Specify view mode of unnecessary panels for Project page.

Show: true, Do not show: false. The default is false.

agentui.state.onetime.change

Limits the state change to 1 time for the Project page.

Limit: true, Do not limit: false. The default is false.

agentui.show.project.name

Specify the project name in the Project Title header

Show: true, Do not show: false. The default is false.

agentui.customer.search.max.records

Specify the number of maximum results from the customer search dialog in the Project page. The default is 50.

agentui.contacts.list.mode

Specify the view mode of contacthistory for the Project page.

View contact histories for the selected project:0, view contact histories for projects viewable by agents:1, view all contact histories for customers being viewed:2. The default is 1.

agentui.auto.select.call.result.amd

Specify the call results auto detection mode for the Project page.

Disabled:0, Auto Detect: 1, Auto detect and lock the call results:2. The default is 2.

agentui.auto.select.call.result.progressive

Specify the call results auto detection mode for progressive calls for the Project page.

Disabled:0, Auto Detect: 1, Auto detect and lock the call results:2. The default is 2.

agentui.auto.change.agent.state.amd

Specify the Agent state auto transfer mode by AMD for the Project Page.

Disabled:0, Available: 1, On Break:2, Working: 5. The default is 2.

agentui.auto.change.agent.state.progressive

Specify the Agent state auto transfer mode in Progressive calls for the Project Page.

Disabled:0, Available: 1, On Break:2, Working: 5. The default is 0.

agentui.table.max.length

Specify the max length of table columns on the Project page.

The default is 12.

agentui.inactivate.method.readonly

Specify the view mode for the read-only items on the input form for the Project page.

readonly:true、disabled:false. The default is false.

adminui.table.max.length

Specify the max character displayed in the table column for the Admin page.

The default is 12.

5.5. Manage

5.5.1. Access Control

Configures the access control of users for Brekeke CRM.

The permissions for Admin page and Project page can be configured in this priority: Per User Type Configuration, Per Group Configuration, Per User Configuration. If not configured within the workspace or project, the access is inherited using the System(root) > Workspace > Project hierarchy.

Per User Type Configuration

Configures the access control for Admin page per user type.

Field	Description
Enable	Enable and disable the configuration. When disabled, the user type will not have any access to the screen.
User Type	The user type for the access control configuration. Administrator, SV, Agents (users)
Permission	Basic permission type for the user. You can select three permissions – Administrator, Supervisor, Agent. Please see other section for differences between these types.
Customer	Access control for customers in the workspace. Select checkbox

	for the operations allowed to the user - Register, modify, merge, delete.
Call Destination	Access control for call destinations in the project. Select checkbox for the operations allowed to the user – Modify or Register Customers.
Contact results	Access control for contact results in the project. Select checkbox for the operations allowed to the user – Register, Modify, Modify All. “Modify” allows the user to modify the contact results entered by the user, “Modify All” allows the user to modicy all contact results including the ones entered by others.

Per Group Configuration

Configures the access control for Admin page per group associated to the user and per user type.

Field	Description
Group ID	The group for the access control configuration. Specify the group defined in CIM.
User Type	Same as Per User type Configuration
Permission	Same as Per User type Configuration
Customer	Same as Per User type Configuration
Call Destination	Same as Per User type Configuration
Contact results	Same as Per User type Configuration

Per User Configuration

Configures the access control for Admin page per group associated to the user and per user type.

Field	Description
User ID	The user for the access control configuration Specify the user ID defined in CIM
Permission	Same as Per User type Configuration
Customer	Same as Per User type Configuration
Call Destination	Same as Per User type Configuration
Contact results	Same as Per User type Configuration

Project page Configuration

Configures the access control for Project page per user type.

Field	Description
User Type	User type for the access control configuration Administrator, SV, Agent (Users)
Customer	Access control for customers in the workspace. Select checkbox for the operations allowed to the user - Register, modify.
Call Destination	Access control for call destinations in the project. Select checkbox for the operations allowed to the user – Modify or Register Customers.
Contact results	Access control for contact results in the project. Select checkbox for the operations allowed to the user – Register, Modify, Modify All. Register access is given to all users who can access to the project page.

Permission types

In Brekeke CRM, there is three types of permissions, Administrator, Supervisor, Agent. The following table explains the differences between each type on Admin page.

Functionality	Agent	SV	Administrator
System (root)			
Create, Delete Manage Workspace			○
Workspace			
Configure/Manage Customers			○
View/Import/Export Customers		○	○
Add/Remove/Manage Projects			○
Manage Do not call list			○
View/Import/Export Do not call list		○	○
Configure			○
Manage			○
Project			
Processing status		○	○
Configure/Manage Customers			○
Export Customers		○	○
View Customers	○	○	○
Manage Call List			○
View/Import/Export Call List		○	○
Remove/Schedule Call List		○	○
View/Import/Export Contact History		○	○
Dialer			○
Configure			○
Manage			○

5.5.2. Resource

Configure application resources available to use for each tenant in Multi Tenant edition.

Field	Description
General	
Max Sessions	Limits the number of maximum simultaneous sessions for the user.

Max Workspaces	Limits the number of maximum workspaces
Max Customers	Limits the number of maximum customers
Max Projects	Limits the number of maximum projects
Max Contacts	Limits the number of maximum contacts
Call features	
Generic Features	Limits the generic features
Dialer Features	Limits the dialer features
Predictive Dialer Features	Limits the dialer's call mode, Predictive or Audio response.
Simultaneous Max Executed Dialers	Limits the number of maximum dialers executed simultaneously.
Other features	
Item customization feature	Limits the item customization features(Customers and contact results item configurations)
Screen customization feature	Limits the layout functionalities for the project screen.
Talk script player feature	Limits the talk script player feature

5.6. Maintenance

5.6.1. Update Software

Update the software to the different version. After selecting the war file, click [Update] button to start the application updates. Restart the application server to complete the updates.

5.6.2. License

Activates license. Enter product ID and click [Activate] button and follow the instructions on the screen to complete the activation.

6. Workspace Menu

You can manage settings or projects for each workspace.

In Brekeke CRM, each workspace manages separate customer lists.

6.1. Customers

6.1.1. Customers

Displays the list of customers registered to the workspace.

You can create a new customer using [New] button.

Clicking the ID of a customer will take you to the detail page and you can view or edit the customer information.

The list can be filtered by specifying the filters.

In addition to the following filters, you can specify the fields configured as a search field in the field settings page as a filter.. Those configured as a List field type in the field settings page will also be listed.

Filters:

Field	Description
Project	By selecting a project, you can specify the project status and the project contact result field as a filter.
Customer ID	Filter by Customer ID.
Status	Filter by customer status. Appears only when the status is defined in the workspace.
Date Created	Filter by date in which customer was created.
Last Contact Date	Filter by date of last contact with customer.
Phone Number	Filter by customer's phone number
Name	Filter by customer's name.
Status(Project)	Filter by customer's status(project). Appears only when you select a project and the status is defined in its project.
Contact Date	Filter by whether there is a contact history between the specified contact dates.
Agent	Filter by whether there is a contact history with the specified agent ID.
Type	Filter by whether there is a contact history with the specified type.

Result	Filter by whether there is a contact history with the specified result. Appears only when you select a project.
Max	Specify maximum customers to be displayed.
Sort	Specify the sort order of customers to be displayed.
Update List	Refresh the list with the specified filters.

Customer List

Field	Description
Select	Select checkbox next to the customer to apply the selected action by clicking the [Apply] button.
ID	Displays customer ID.
Status	Displays customer statuses. Appears only when you select a project and the status is defined in its project.
Phone Number	Displays dates of last contact with customer.
Name	Displays customer names.
Date/Time Created	Displays date/time on which customer was created.
Last Contact Date/Time	Displays the last contact date/time.
Apply	Select the "Delete" action and "Apply" to remove customers you checked in the "Select" column.

6.1.2. Customer Detail

Displays the customer information in detail.

You can edit or delete the customer from this page.

In addition to the following fields, all fields configured in the filed settings page will be listed in the customer detail page.

Clicking the contact history row will display the details of the contact history.

This page displays the customer information in the scope of workspace and for example, you will be able view all the contact histories in the multiple projects at once.

If you wish to view and edit the contact history details on each project, or register a new contact result, you can visit to the customer details page within the project.

Please refer to "Projects > Customers > Customer Details" section in this document.

Field	Description

Basic Information	
Customer ID	Customer ID
Date/Time Created	The date/time on which the customer was created.
Last Contact Date/Time	The last contact date/time with the customer.
Status	The status of the customer. Appears only when the status is defined in the workspace.
Change Status	Change status of the customer. Appears only when your permission to change status is set to true and the workflow is defined.
Merge	Select the customer ID to merge to and the customer information is merged to the specified ID. When the merge completes, the customer will no longer display in the list and all the contact history records will be merged to the contact history for the customer with the specified ID.
Delete	Delete the customer
Customer Information	
Phone Number	Customer's phone number 1 - 3.
Fax Number	Customer's fax number.
Email	Customer's email address.
Name	Customer's name.
Gender	Customer's gender.
Zip (Personal)	Zip code of customer's address
Address (Personal)	Customer's address 1 – 2.
Employer	Customer's employer.
Zip (Employer)	Zip code of customer's work address.
Address (Employer)	Customer's work address 1 – 2.
Notes	Notes
Contact History	
Contact Start Date/Time	Contact Start Date/Time.
Project Name	Project Name.
Agent ID	Agent ID.
Type	Inbound call, Outbound call, No Contact type.
Result	Results.
Edit History	

Time Edited	Date and time edits were made.
User Name	User who edited.
Field	Field(s) that were edited.
Changes	Changes made.

6.1.3. Import

Register customers to the workspace by importing the specified CSV file.

The fields that you can specify is the same as the fields in the customer information section of the customer details page. Please refer to the "Customer Details" section for more information on the field names and descriptions.

I. Select a CSV file to import. The program assumes the first record to contain field names and if you would like to automatically map fields, select the "Map First Row as Field Name" checkbox.

II. Click the [Import] button.
As soon as the button is clicked, the CSV file is uploaded and when it completes, you will proceed to the "Assign Fields" page.

III. Several records from the top of the imported CSV will be displayed. Using that as a guide, assign fields by selecting the field in the list header select box.

IV. Click the [Register] button.
Each customer record is validated and the record will be imported to the appropriate field value.

Display Fields (Select File page)

Field	Description
CSV File	Select a CSV file to be imported to the customer list. You can only specify a file with the extension CSV.
Map First Row as Field Name	When this checkbox is selected, the fields in the first row of CSV file are automatically mapped to the existing fields if they match with those on the next "Assign Fields" page.
Upload	Import the selected CSV file. After the upload completes, the Assign Fields page displays.

Display Fields (Assign Fields page)

Field	Description
Field dropdown	Assign customer information field for each field to be imported. The same field cannot be assigned twice.
Remove First Row	Remove the first row from import target. Select the checkbox when the first row of CSV contains field names.
Invalid Record Handling	Specify the action when an error occurs in the validation during the registration. If the "Skip Invalid Records and Proceed" is selected, the records with error is skipped and only the valid records will be registered. If the "Stop and Rollback" is selected, the registration process is suspended immediately if an error occurs and cancels all the registration.
Register	Start the customer registration and you will proceed to the results page.
Cancel	Cancel the customer registration and go back to the "Select File" page.

6.1.4. Export

Export the customer data and the contact results in CSV file format.

For the contact results, only the common fields in the workspace scope can be exported. Please export the detailed contact results for each project from the project menu.

Display Field

Field	Description
Filter	Specify the filter to narrow down the customer output to CSV. Please refer to "Workspaces > Customers > Customer Detail".
Output Order	Specify the sort order of customers to be exported to CSV.
Output Fields	Select the customer fields to be exported to CSV. Select an item and press the arrow buttons to move between the Unselected List and the Selected List. Please select at least one field.
Output Order	Specify the sort order of contact results to be exported to CSV.

(Contact Results)	
Output Fields (Contact Results)	Specify the contact result fields to be exported to CSV. If no contact result field is selected, one customer per record will be exported. If you select more than one contact result field, one contact result per record will be exported.
Apply Filter to Contact Result	If unchecked, the filter will be applied only to refine the customer data. (As a result, the contact results for all customers are exported.) When checked, not only the customers but also the contact results are narrowed down by the filter in the export.
Insert Field Names as First Row	Select if the field names should be inserted to the first row in CSV.
Export	Start the export.

6.1.5. Status Settings

In Brekeke CRM, you can assign one single value as the status for each customer.

The actual status transition is done through the customer details page, but in this page, the statuses that are allowed to transition to are defined.

If you have not defined any status, you will not be able to use this functionality where you can assign status to a customer.

Field	Description
Add	Add a new status.
Status	Specify the name of the status.
Permission to Assign	Configures the permission to assign this status.
Up and Down arrow	Sort statuses.
Delete	Delete status.
Workflow	For each current status, select the checkbox of statuses to which the current status can be transitioned. You will not be able to transition the current status to the unchecked statuses.
Initial Status	Select the status automatically assigned for the newly registered customers.
Save	Save the status list and the workflow.

6.1.6. Field Settings

In Brekeke CRM, you can freely customize the fields for the customer list managed by workspace.

(Only available with the edition enabled with the field customization feature. If not enabled, you can only use default fields and this page will not be displayed.)

Each Field belongs to a category and you can add and delete categories, change the order, and set the name.

By default, four categories; contact information, personal information, work information and customer information notes, are defined.

You can add, edit, delete and change order of customer information field within a category.

You will be able to set a type for each field and each type allows different value formats or input methods. Some data types allow to define even more details using the Options input field such as format.

The settings are reflected when the [Update] button is pressed.

If you change the settings while the application is running or after creating the customer data, you may experience problems temporarily with the operations such as saving data or the export due to the inconsistencies.

such as the operation may save or export the data to a temporary failure by such inconsistencies.

It is strongly recommended not to change the settings while the application is running.

Category

Field	Description
Category Names	Enter the name of the category.
Up and Down arrow	Sort categories.
Delete	Delete a category
Add Category	Add a new category.

Customer Information Fields

Field	Description
Caption	Enter Field Caption.
Type	Specify data type for the field
Field Name	Enter the name of the field.

	If you enter a number in square brackets after the field name, multiple fields that are consecutively numbered will be created. For example: If you enter Caption="Phone Number", Field Name="telno[3]", "Phone Number2", "Phone Number2", "Phone Number3" are created.
Up and Down arrow	Move fields up and down.
Delete	Delete field.
Show in List	Fields with this option checked will be displayed in the customer list in the customers page.
Use in Search	Fields with this option checked can be specified as search filter in the filter column in the customers page or export page.
Use in Partial Search	Fields with this option checked can be searched as the partial match conditions.
Create Index	For Fields with this option checked, the index is created in the database. Configure this to the fields that are commonly used to improve the search performance.
Required	Fields with this option checked cannot be saved without the input.
Show in Widget	Fields with this option checked displays in the widget on the Agent page when dialing. You can only configure this setting to one field.
Length	Appears only for the Text type. Configure the length of the text.
Pattern	Appears only for the Text type. Configure the patterns of the text in the regular expression for the input validation. The text that does not match with the pattern specified here cannot be saved.
Options	Appears only for the Checkbox, Select List or Radio Button type. Select the option you wish to display the field as. Example (Checkbox, Select List, Radio button): [{"value":"a" }, {"value":"b" }

	]
	Example (Hierarchical Select List):
	{
	"a":
	{
	"a1":{"a11":{},"a12":{}},
	"a2":{"a21":{},"a22":{}}
	},
	"b":
	{
	"b1":{"b11":{}},
	"b2":{"b21":{}}
	}
	}

Preview Dialing	Appear only for the Phone type. The fields with this option checked will display the [Call] button displays on the Agent page and you can perform the preview dialing.
Dialer Dialing	Appear only for the Phone type. The fields with this option checked will be used as the call list phone number when dialed by the dialer.
Add Field	Add a new field.

Type List

Field	Description
Text	A type where a simple string can be entered. You will not be able to store more than the specified number of characters set in the Length field. The input field is a text box where you can enter a one-line character string.
Long Text	A type in which you can enter the string without the limit on the length. The input field is a text area where you can enter multiple lines of text.
Number	A type in which you can enter a numeric value. It can not be

	saved if a non-numeric value is entered. The input field is a text box where you can enter a one-line character string.
Checkbox	A type in which you can select multiple options from the selection.
Select List	A type in which you can select one option from the selection. The input field is a select box that displays as a dropdown box to display selections.
Hierarchical Select List	A type where you can specify children lists for each select list item.
Radio Button	A type where you can specify one option from the given selections. The input field is a radio button that only allows one option by a click.
Date	A type where you can enter a date. The input field is a text box where you can also choose to display the calender by a click to select the date.
Phone Number	A type where you can enter a phone number. You will not be able to save if other than phone number is entered. The number to be used for a call must be this type of field. The input field is a text box where you can enter a one-line character string.
Birthday	This is almost the same as the date type, but this is a type where the current age is shown along with the date.
Script Button	Special type where it executes javascript when button is clicked. IF is prepared for customer fields or contact results' optional fields and the field inputs or calculations can be automated. Use the following format to access to screen items: [Using Customer fields] $crm.customer.<*field_name*>.getValue(); $crm.customer.<*field_name*>.setValue(<*value*>); [Using Contact Results fields]

	$crm.contact.<*field_name*>.getValue();
	$crm.contact.<*field_name*>.setValue(<*value*>);
	
	Depending on the state of the screen, if the field does not exist, it will throw ReferenceError, do develop exception handling as needed.
	[Example1: Set a string to the customer's workplace field]
	$crm.customer.workplace_name.setValue("Brekeke Software Inc.");
	
	[Example2: Copy the contact results notes to customer notes]
	try {
	  $crm.customer.remark.setValue($crm.contact.result.getValue());
	} catch(e) {
	  if(e instanceof ReferenceError) {
	    $crm.customer.remark.setValue("no result");
	  }
	}

6.1.7. Manage

Configure to automatically remove customers without contact for a certain period of time.

Display Field

Field	Description
Auto Delete Customers	When set to “Enabled”, perform a process of deleting customers that meet the conditions configured below at midnight everyday. If it is set to “Disabled”, the automatic deletion will not be performed.
Basic Conditions Days Since Last Contact or Registered date	Set the target of deletion to all the customers who have exceeded this setting days from the date of last contact (If there is no contact results, it is the days from the registered date). Customers only age has exceeded the set value of this (from the date of registration for customers no contact results 1) be deleted from the date of last contact.
Status Filter	Select the status. Select an item and press the arrow buttons to move between the Unselected List and the Selected List.
Filter Mode	When set to “Delete Customers with Selected Statuses”, out of all the customers who meet the basic conditions, the customers with the selected statuses will be deleted. When set to “Do Not Delete Customers with Selected Statues”, out of all the customers who meet the basic conditions, the customers with the selected statuses will not be deleted, but others will be deleted.
Delete when Saved	When checked, the deletion of appropriate customers happens the moment you save the settings. Even if the Auto Delete Customers setting is set to “Disabled”, the removal process is performed once after saving if this checkbox is selected.
Save	Save the settings and if “Delete when Saved” option is selected, the deletion is executed.

6.2. Projects

6.2.1. Projects

Displays the list of projects registered to the workspace.

You can create a new project using [New] button.

Clicking the project name will take you to the project menu.

The list can be filtered by specifying the filters.

Filters:

Field	Description
Project Name	Filter by project name.
ACD	Filter by ACD.
State	Filter by project state.
Sort	Specify the sort order of projects to be displayed.
Update List	Update the list of project with the specified filters.

Project List

Field	Description
Project Name	Project name
State	Project state.
ACD(Inbound)	ACD where the inbound calls are processed for the project.
DNIS	DNIS where the inbound calls are processed for the project.
ACD(Dialer)	ACD that makes dialer calls for the project.
Dialer	State of the dialer.
Processed Calls	Number of processed calls in the call list.
Total Calls	Total numbers in the call list.
Call Completed Rate	The efficiency rate for completing the call list.

6.2.2. Contact Result Settings

In Brekeke CRM, you can freely customize the result fields for each project to be recorded by an agent while handing a customer

(Only available with the edition enabled with the field customization functionality. If not enabled, you can only use default fields and this page will not be displayed.)

Settings on this page is the default setting for the workspace. It is used if you do not set them to a project individually.

You can add, edit, delete and change order of result information fields, however, the “Result” field can not be changed other than its options setting.

The settings are reflected when the [Update] button is pressed.

If you change the settings while the application is running or after creating the customer data, you may experience problems temporarily with the operations such as saving data or the export due to the inconsistencies.

It is strongly recommended not to change the settings while the application is running.

The fields and the types that can be configured here are the same as those from customer except a few fields. For more information, please refer to “Workspaces > Customers > Field Settings”.

6.2.3. Project Screen Settings

In Brekeke CRM, you can freely customize the project screen layout for each project.

(Only available with the edition enabled with the project screen layout customization functionality. If not enabled, you can only use default layout and this page will not be displayed.)

Settings on this page is the default setting for the workspace. It is used if you do not set them to a project individually.

If you change the customer field settings or result settings for the project, you may experience problems with the project screen due to the schema information mismatch or the required fields that are not being placed on the project screen. Please review the project screen settings after modifying the schema.

Project Screen Settings

Field	Description
Layout Designer Data	Displays the layout data for the project screen. In order to edit the data, launch the layout designer.
Launch Layout Designer	Launch the layout designer in a separate window.
Reset to Default Settings	Reset the project screen layout to default for the application when this setting is checked and applied.
Apply	Apply the screen contents and changes. Even though the edits are saved in the layout designer, the script data will not be applied unless this button is clicked.

Project screen consists of a hierarchy of four: “Screen” where the main area of the screen, “Frames” that are divided by the borders, “Panels” that are bundled for each category, “Fields” where it takes an input, displays data and performs various operations. The Layout Designer allows you to change the display settings or placement and lets you freely customize the project screen layout.

Layout Designer

Field	Description
Designer Menu	
Finish Editing	Edits made in the Layout Designer will be reflected to the layout data field on the project screen settings page and close the designer screen.
Field List	
Display the list of fields or panels that have not been placed on the project screen. In addition to the system fields such as basic operation buttons and outgoing result panel, dynamic fields that are defined by the settings, such as the project result settings and customer fields will be displayed in an expandable tree menu list using: Panels > Fields. In order to place the panel on the project screen, drag and drop the panel to the desired frame. If you wish change the order of panel or move to a different frame, drag and drop to the desired location, if you wish to delete, drag and drop out from the screen or to the field list. Some fields are required fields marked in red and the layout cannot be completed without placing those on the screen.	
Screen	
Project Screen's main area. Open setting dialogs by the right-click menu on the screen.	
Split Screen (Number of Panes)	Specify the number of panes to divide to for the screen.
Split Screen (Split Format)	Specify the split format depending on the number of panes chosen for the screen.
Frame	
This is a section to place the panels divided by the borders within the screen. Open setting dialogs by the right-click menu on the screen.	
Use Tabs	Frame display format will be set to Tab format.
Tab Position	Specify the Tab placement.
Show Panel Divider	Specify whether to show the dividers between panels.
Width	Specify the frame width.

	If the “Fixed” checkbox is unchecked, the frame width will be set to adjustable.
Hight	Specify the hight of a frame. If the “Fixed” checkbox is unchecked, the frame hight will be set to adjustable.
Tab Frame (Allows you to specify only when the frame display format is set to Tab)	
Use Caption for Panels	When checked, the caption for each panel displays as tab caption.
Caption	Specify caption for the tab.
Panel	
This is a section for arranging the fields that have been classified into each category. If you wish change the order of panel or move to a different frame, drag and drop to the desired location, if you wish to delete, drag and drop out from the screen or to the field list. Open setting dialogs by the right-click menu on the frame.	
Name	
Modify Layout	Select this checkbox when modifying the panel layout. When checked, the fields withing a panel can be moved around and can be individually displayed. However, if the schema that are the source of the panel is changed, it will not be automatically synchronized.
Show Captions	Specify whether to display panel captions.
Collapsible	Specify whether to set the panels to be collapsible.

6.2.4. TSP Settings

In Brekeke CRM, an agent can bring up the talk-script player while handling a customer. This will assist agents with the conversation with the customer and with the recording of the contact results.

The talk-script consists of three parts; stages, scripts, and the input.

During a call with a customer, the agent can view the scripts provided for each stage as the agent switches between the stages and enter the conversation log in input fields defined for the stage to complete the recording of the contact results.

This screen is used to configure whether or not to create and use the talk-script.

Talk-Script Player Settings

Field	Description
Script	Displays the data for talk-script. Use the Script Designer to edit the data.
Launch Script Designer	Launches the script designer in a separate window.
Use Script Player	Agent will be able to view the talk script player by clicking the TSP button while entering the contact results on the agent screen.
Script Player Auto Pop-up	Talk script player will appear automatically on the agent screen at the start of the call.
Apply	Apply the changes made to the script. Please note that even if you click the Save button in the script designer, the script data will not be applied until you click on this button.

Script Designer

Field	Description
Menu	
Save	The edits made in the script designer is applied to the Script Data field value in the TSP Settings page.
Play	Launch the talk script player and verify the changes in the actual screen.
Detailed Configuration	Display the scenario detailed configuration dialog.
Switch Block	Specify whether or not to display DIV tag.
Stage	
Stage	Lists the defined stages When right-clicked, the following menus will be displayed.
ID	Stage ID.
Caption	Caption of the stage.
Next Stage ID	The next stage ID.
Up	Move selected stage up.
Down	Move selected stage down.
New	Create a new stage.
Copy	Copy the stage.
Delete	Delete the stage.

Script	
Script	Display the scripts for the selected stage. You can freely write the contents of the script. Take advantage of Text Editing Tools to customize the format.
Input	
Input	Display the input fields configured for the selected stage. When right-clicked, the following menus will be displayed.
ID	Input field ID.
Caption	Caption of the input field.
Required	Set input field required.
Up	Move selected input field up.
Down	Move selected input field down.
Reset	Reset the selected field to the initial state.
Copy	Copy the input field.
Delete	Delete the input field.
New	Create a new input field after selecting the type.
Clear	Delete all input fields configured to the stage.
Item	When the input field type is set to checkbox, radio or select, its options will be displayed. When right-clicked, the following menus will be displayed.
Value(Item)	The value of selected item
Code(Item)	The code of selected item
Next Stage ID(Item)	Specify the next stage id to move to when the item is selected.
Up(Item)	Move selected item up.
Down(Item)	Move selected item down.
Add(Item)	Add a new item.
Copy(Item)	Copy the item.
Delete(Item)	Delete the item.
Results	
Results	Displays if there is an error in the settings when you click the Save button.
Scenario Detail Settings	
Output Format	Configures output format
Default Input Mode	Configures default output mode

Modify Output Mode	Configures if output mode can be modified in the Talk Script Player.
Separator	Configures the separator character output to the Talk Script Player results.
Output Header	Configures if header should be in the output.
Output Stage Name	Configures the output format of Stage Name
Output Field Name	Configures the output format of Field Name

6.3. Do Not Call List

6.3.1. Do Not Call List

Display the Do Not Call list registered to the workspace.

In Brekeke CRM, the call to the call list record registered to the Do Not Call list will be suppressed.

You can add a new number to the Do Not Call list by entering a phone number using [New] button.

Clicking on the number from the list will take you to the detail page and you can view or modify the phone number.

The list can be filtered by specifying the filters.

Filters:

Field	Description
Phone Number	Filter by phone number.
Date Registered	Filter by the date created.
Registrar	Filter by the person who registered the number
Max	Specify maximum phone numbers to be displayed.
Sort	Specify the sort order of phone numbers to be displayed.
Update List	Update the list of phone numbers with the specified filters.

Phone List

Field	Description
Select	Select the checkbox next to the number to apply the selected action by clicking the [Apply] button.
Phone Number	Display phone number(s) added to the Do Not Call list. When clicked, the detail page of the number in the Do Not Call

	list will be displayed.
Date Registered	Display the date on which the phone number was added to the Do Not Call list.
Effective Until	Display the date until the number should be considered as Do Not Call.
Registrar	Display the user ID who registered the number to the Do Not Call list.
Customer ID	Customer ID for the phone number. Appears only when the customer is selected from the agent screen and added to the Do Not Call list. When clicked, the customer detail page will be displayed.
Notes	Notes.
Apply	Select the “Delete” action and the “Apply” button to remove the numbers you selected in the “Select” column.

6.3.2. Do Not Call List Detail

Display the detail information of the phone number registered to the Do Not Call list.

You can modify and delete the phone number, Ineffective date and notes fields.

Field	Description
Basic Information	
Phone Number	Display phone number(s) registered to the Do Not Call list.
Date Registered	Displays the date on which the phone number was added to the Do Not Call list.
Effective Until	Display the date until the number should be considered as Do Not Call.
Registrar	Displays the user ID who registered the number to the Do Not Call list.
Customer ID	Customer ID for the phone number. Appears only when the customer is selected from the agent screen and added to the Do Not Call list. When clicked, the customer detail page will be displayed.
Notes	Notes

6.3.3. Import

Register a Do Not Call list to the workspace by importing the specified CSV file.

The fields that you can specify is the same as the fields in the Do Not Call list in the contact detail page. Please refer to the "Customer Details" section for more information on the field names and descriptions.

Moreover, its Select File and Assign Fields pages work the same as the customer import. Please refer to "Workspaces > Customers > Import" section for more detail on how to navigate through the import operation.

6.3.4. Export

Export the Do Not Call list in CSV file format.

Display Field

Field	Description
Output Order	Specify the sort order of numbers in the Do Not Call list to be exported to CSV.
Output Fields	Select fields from the Do Not Call list to be exported to CSV. The fields in the Selected List will be exported to the CSV. Select an item and press the arrow buttons to move between the Unselected List and the Selected List. Please select at least one field.
Insert Fields as First Row	Select if the field names should be inserted to the first row in CSV.
Export	Start the export.

6.3.5. Manage

Do Not Call list can be initialized.

When the list is initialized, the Do Not Call list for the workspace will be removed entirely.

6.4. Settings

6.4.1. Workspace

Modify the workspace name and the workspace summary.

6.5. Manage

6.5.1. Workspace

You can enable and disable the workspace, and delete the workspace.

When a workspace is disabled, all projects in the workspace will be non-accessible from the agent screen. When re-enabled, the projects will appear in the agent screen.

When a workspace is deleted, all the information in the workspace will be deleted. Please note that you will not be able to undo the workspace deletion process.

6.5.2. Access Control

Configure the access control for the workspace.

When “Inherit Security settings from parent hierarchy” is checked, it inherits the access control settings from above. Fields on other screens are the same as main menu's access control configurations. Please refer to Main Menu > Manage > Access Control.

7. Project Menu

You can manage settings and operations for each project.

7.1. Current Stats

7.1.1. Contact Result

Display the summary of all contact results in the project.

Field	Description
Result	A Result field of contact results. Break down the results and display the summary for each category.
General Inbound	Display the number of contact results obtained from the inbound calls.
General Outbound	Display the number of contact results obtained from the preview dialing(click-call) other than those from the dialers.
Dialer Outbound	Display the number of contact results obtained from the outbound calls by dialers. The number in parentheses displays the summary value only targeting the contacts that are currently registered to the project
Without a Call	Display the number of contact results added manually.
Total	Display the total number of contact results.
Remaining	If the number to stop the dialer is configured, this value displays the remaining number until the dialer stops.

7.1.2. Dialer

Display the call list records registered to the project, categorized by the state or the call result.

Field	Description
Call List Records by State	Display the number of call list records, categorized by each state.
Call List Records by Call Result	Display the number of call list records, categorized by each call result.
Completed Call List Records by Call Result	Display the number of completed call list record, categorized by each call result.

7.2. Customers

7.2.1. Customers

Display a list of customers registered to the workspace.

The contents displayed in the list are the same as the customers page in the workspace menu.

Please refer to “Workspaces > Customers > Customers” for more information.

When the ID is clicked, the detail page will be displayed and you will be able to view and edit the detail information of the customer in the project.

7.2.2. Customer Detail

Displays the customer information in detail.

In addition to the same fields from the workspace menu, Project Customer Information, Add Contact Result, Call History sections will be displayed.

Call Histories displayed here are only for the current project.

Field	Description
Project Customer Information	
Status	Customer status on this project. Appears only when the status is defined in the project.
Change Status	Change status of the customer for this project. Appears only when your permission to change status is set to true and the workflow is defined.
Add Contact Result	
Result	Contact result.
Detail	Detail of the contact result.
Notes	Notes for the contact result.
Add	Add contact result.
Call History	
Dialed Date/Time	The date/time on which the call was made.
Dialed Phone Number	Dialed phone number.
Dialing Mode	Dialing Mode.
Call Result	Call result from the call
Assigned Agent	Agent

✓ *Please refer to “Workspaces > Customers > Customer Detail” section of this document for more information on other fields.*

7.2.3. Export

Export the customer data and the contact results in CSV file format.

In addition to the same fields from the customer export in the workspace menu, you can export other fields such as customer information for this project or detail fields for the contact result. As for the contact results, only the ones for this project are exported.

The operations allowed on this page are the same as the customer export in the workspace menu. Please refer to "Workspaces > Customers > Export" for more information.

7.2.4. Status Settings

In Brekeke CRM, you will be able to define statuses that are specific to the current project in addition to the statuses for the entire workspace.

The actual status transition is done through the customer details page, but you can configure the statuses that are allowed to transition from one to another.

If you have not defined any statuses, you will not be able to use this functionality where you can assign a status to a customer.

The operations allowed on this page are the same as the customer export in the workspace menu. Please refer to "Workspaces > Customers > Status Settings" for more information.

Moreover, after you configured the status for the newly registered customer, this status is automatically assigned to the customer when created from this project customer page and the agent screen.

7.2.5. Manage

This page configures the auto deletion of contact results after a certain period of time elapsed from the last contact.

Display Field

Field	Description
General Auto Delete Contact Results	When set to "Enabled", perform a process of deleting contact results that meet the conditions configured below at midnight everyday. If it is set to "Disabled", the automatic deletion will not be performed.
Basic Conditions Days Since Last Contact	The auto-deletion will be delete the contact results where the number of days elapsed since the last contact exceeds this setting value.

Filter for Results	Select result(s). Select an item and press the arrow buttons to move between the Unselected List and the Selected List.
Filter Mode	When set to “Delete Contact Results for the Selected Results”, out of all the contact results that meet the basic conditions, the contact results with the selected result values will be deleted. When set to “Do Not Delete Contact Results for the Selected Results”, out of all the contact results that meet the basic conditions, the contact results with the selected results will not be deleted, but others will be deleted.
Delete when Saved	When checked, the deletion of appropriate contact results happens the moment you save the settings. Even if the Auto Delete Contact Results setting is set to “Disabled”, the removal process is performed once after saving if this checkbox is selected.
Save	Save the settings and if “Delete when Saved” option is selected, the deletion is executed.

7.3. Call List

Mange call list information that are used for the dialer to make calls.

Brekeke CRM manages call list for each project.

The call list data has the same structure as the customer data and you can register call list data from the customers who are already registered to the workspace.

Additionally, you can also import data that have not registered as customers from the CSV file and register as non-customer call list records.

You will be able to keep the contact results for non-customers in the same way as the customers and you can register them as your customer later.

Register call list from the import screen and once the call list record is registered, it will not be deleted unless the whole call list is deleted.

If you wish to cancel the call for a specific call list record, set the record to “Suspend Dialing” in the call list or the call list record detail or set the record to “Bulk Suspend“ in the Bulk Suspend page.

7.3.1. Call List

Display a list of call list records registered to the project.

When the ID is clicked, the detail page will be displayed and you will be able to view and edit the detail information of the call list record.

The list can be filtered by specifying the filters.

Filters

Field	Description
Status	Filter by call list status.
Last Attempt Call Date	Filter by date of last time the call was made
Last Call Result	Filter by the call result from the last time the call was made.
Assigned Agent	Filter by the agent assigned to the call list.
Phone Number	Filter by the phone number registered in the contact list.
Name	Filter by the name registered in the contact list.
Contact Dates	Filter by whether there is contact results for the call list between the specified dates.
Agent	Filter by the agent ID of the contact results for the call list.
Result	Filter by the result value of contact results for the call list.
Max	Specify maximum call list records to be displayed.
Sort	Specify the sort order of call list records to be displayed.
Update List	Refresh the call list with the specified filters.

List of Call List Records

Field	Description
Select	Select checkbox next to the call list record to apply the selected action by clicking the [Apply] button.
Phone Number	Phone number of call list record.
Name	Name of call list record.
State	State of call list record.
Number of Attempted Calls	Number of calls made to the cal list record.
Last Attempt Call Date/Time	Displays the last dialed date/time.
Last Call Result	Displays the last call result of last call.
Assigned Agent	Assigned agent for the call list.
Suspend Dialing	Changes the state of the call list record from “Waiting” to

	"Dialing Suspended" and the dialer no longer calls the call list record.
Resume Dialing	Change the state of the call list record from "Dialing Suspended" to "Waiting" to allow the dialing to the call list record.
Assigned Agent	Change the assigned agent for the call list record. When the assigned agent is configured, the assigned agent is given priority and will be answer the call list record in the preview dialing mode. This setting does not apply if the dialing mode is set to other than the Preview mode.
Apply	Select the "Suspend Dialing", "Resume Dialing" and "Assign Agent" and the "Apply" button to execute the action for the call list records selected in the "Select" column.

7.3.2. Call List Record Detail

Displays the call list record in detail.

You can set to suspend dialing, resume dialing, assign agent for a call list record, and register non-customer data from this page.

When the call list record is a customer, you can view the customer information in detail. Editing should be done from the customer detail page.

When the call list record is a non-customer record, you are able to edit the call list record.

For both customer and call list record details, the same fields are displayed as the customer detail page. For more details, please refer to "Workspaces > Customers > Customer" section in this document.

As for the contact results and the call histories, only the calls placed by the dialer for the call list record are displayed even when it is a customer record.

Field	Description
Call List Record - Basic Information	
Registered Date/Time	Date/Time on which this call list record was created.
Completed Date/Time	Date/Time on which the call list record process has been ended after its contact result is set to "Completed"
State	State of call list record.
Last Call Result	Displays the last call result of last call.
Number of Attempted Calls	Number of times calls were made to the cal list record.

Assigned Agent	Assigned agent for the call list.
Suspend Dialing	Changes the state of the call list record from “Waiting” to “Dialing Suspended” and the dialer no longer calls the call list record.
Resume Dialing	Change the state of the call list record from “Dialing Suspended” to “Waiting” to allow the dialing to the call list record.
Assign Agent	Change the assigned agent for the call list record. When the assigned agent is configured, the assigned agent is given priority and will be answer the call list record in the preview dialing mode. This setting does not apply if the dialing mode is set to other than the Preview mode.
Register as Customer	Appears only when the call list record is a non-customer. You can register this call list record as a customer.

- ✓ *Please refer to “Workspaces > Customers > Customer Detail” and “Projects > Customers > Customer Detail” section of this document for more information on other fields.*

7.3.3. Import (Customer)

Search the customers registered in the workspace and register the filtered list as the call list for the project.

Select the “Customers” in the import page, click “Next” and you will be taken to the Register Call List page.

On this Register Call List page, the filter operations and displayed list contents are the same as the customer page in the workspace menu. Please refer to “Workspaces > Customers > Customers”.

When the “Assigned Agent” is entered, the agent is assigned at the registration of the call list records.

When the “Skip Duplicate Customer” is selected, it will skip the registration of customers who are already registered.

Clinking the “Register” button will register the customers displayed in the list as call list records.

The registration of new records can be done while the dialer is running.

7.3.4. Import (CSV)

Import the specified CSV file and register the call list records as non-customer.

You can prepare the same fields as a customer data to register but the call list records registered by the import will be set to non-customer and they will only be used by the dialer for the current project to place the call.

(You can register the record as the customer for the workspace in the “Call List Record Detail” page.)

Select the “CSV” in the import page, click “Next” and you will be taken to the Select File page.

The filter operations and displayed list contents on this Select File page are the same as the customer import page. Please refer to “Workspaces > Customers > Import”.

The registration of new records can be done while the dialer is running. Please note that records will be added even if the data already exists.

7.3.5. Export

Export the call list record data and contact results in CSV file format.

Only the contact results for the call list will be exported.

The operations on the page are the same as the customer export page. Please refer to “Workspaces > Customers > Export”.

For more information on the details of filter and output fields, please refer to “Workspaces > Call List > Call List” section of this document.

7.3.6. Bulk Suspend

Import the list of phone numbers and sets the call list records to be ignored by the dialer.

When you specify a CSV file that contains one phone number per line and click the [Bulk Suspend], that state of call list that contains the phone number listed in the CSV will be changed from “Waiting” to “Dialing Suspended” all at once.

Once the call list record's state become “Dialing Suspended”, the dialer will no longer place a call to the call list record unless the “Resume Dialing” is performed from the call list or the call list record detail page.

When the

Nothing will be done to the call list records with the "Waiting" status.

7.3.7. Call Scheduling

In Brekeke CRM, you can use the “Schedule a Dialer Redial” feature where you can specify the date and time for the dialer redialing. Additionally, for the non-dialer dialing, you can use the “Schedule a Preview Dialing” feature where you can specify the date and time planned to perform the next Preview dialing(Click-Call).

You can schedule a call for each feature above in the schedule redial section of the agent screen.

The detail settings related to the redial can be configured through “Workspaces > Dialer > Redial Settings”.

You can search call schedule records and cancel a schedule record on this page.

Clicking on the call schedule record will display the detail.

Filters

Field	Description
Mode	Specify “General” to display preview dialing schedules, select “Dialer” to display dialer redial schedules.
State	Filter by state of call schedules.
Schedule Type	Filter by the type of call schedules.
Date	Filter by date of call schedules.
Time Range	Filter by time range of call schedules.
Agent	Filter by assigned agent for the call schedules.
Max	Specify maximum call schedules to be displayed.
Sort	Specify the sort order of call schedules to be displayed.
Update List	Refresh the list with the specified filters.

List of Call Schedules, Detail

Field	Description
Select	Select checkbox next to the schedule records to apply the selected action by clicking the [Apply] button.
Customer ID	Customer ID for the schedule record.
State	State of call schedule record.
Type	Type of schedule record. When it is set to “Specified Date”, the call is made on the specified date of the call schedule record. When it is set to “After the Specified Date”, the call is made after the specified date of the call schedule record.
Date	Date of schedule record.
Time Range	Time range of schedule record.
Day of the Week	The day of the week of the call schedule. Appears when the schedule type is set to “ After the Specified

	Date".
Scheduled Phone Number	Phone number for the call schedule record. Appears only when it is for the dialer redialing.
Assigned Agent	Agent assigned to the call schedule record.
Cancel Scheduled Call	Cancel the call schedule records.
Apply	Execute the "Cancel Scheduled Call" for the selected call schedule records in the "Select" column.

7.3.8. Manage

You can delete the entire call list and clear processing results.

When you execute the deletion of all call list records, all call list records registered to the project will be deleted.

When you clear processing results, all processing results for the call list registered to the project will be deleted.

They cannot be used while the dialer is running.

7.4. Contact History

7.4.1. Contact Results

Displays the list of contact results generated in the project.

When the list row is clicked, the detail page will be displayed and you can view customer information and edit the contact result.

The list can be filtered by specifying the filters.

Filters

Field	Description
Phone Number	Filter by customer's phone number
Name	Filter by customer's name.
Contact Date	Filter by contact date.
Agent	Filter by agent ID.
Type	Filter by type.
Result	Filter by result.
Max	Specify the maximum contact results to be displayed.
Sort	Specify the sort order of contact results to be displayed.
Update List	Refresh the list with the specified filters.

List of contact results

Field	Description
Phone Number	Customer's phone number.
Name	Customer's name.
Contact Start Date/Time	Contact start date.
Agent ID	Agent ID.
Type	Inbound call, Outbound call, No Contact type.
Result	Result

7.4.2. Import

Import the specified CSV file and register the contact results.

The same fields from the export of contact histories are available to import.

The procedure for importing, File screen and Assign Fields screens, is the same as Customer import. Please refer to Workspace > Customers > Import section for more detail.

7.4.3. Export

Export the contact results in CSV file format.

One record per one contact result is exported in CSV.

Display Field

Field	Description
Filter	Specify the filter to narrow down the contact results output to CSV. Please refer to “Projects > Call History > Contact Results”
Output Fields (Customer Information)	Select the customer fields to be exported to CSV. Select an item and press the arrow buttons to move between the Unselected List and the Selected List.
Output Order	Specify the sort order of contact results to be exported to CSV.
Output Fields	Specify the contact result fields to be exported to CSV. Please select at least one field.
Insert Fields as First Row	Select if the field names should be inserted to the first row in CSV.
Export	Start the export.

7.5. Dialer

7.5.1. Dialer Settings

Configure dialer settings.

Display Field

Field	Description
ACD	Specify the ID of ACD used by the dialer. When it is set to blank, the project will work without the dialer function. Unable to change while the dialer is running. Unable to specify the same ACD as the dialer for other projects. The availability of the specified ACD depends on the dialer setting of ACD. In order to use ACD as a dialer, Brekeke CRM needs to be registered as the ACD's phone book application. Please refer to the "Installation > Integration settings with Brekeke CIM" section for more detail on how to configure.
Originating Phone Number	Specify the originating phone number when dialed from PBX by dialer.
Ring Time	Ring time of the outgoing call. Valid when the dialing mode is set to predictive, progressive and IVR.
Dialing Mode	Dialing mode of dialer. Specify Predictive, Progressive or IVR Dialing.
Minimum Standby Agents	Specify the number of “Ready” agents who will be waiting to take the calls in the case of projects such as blending projects.
Pacing	Set the pacing feature to be “Enabled” or “Disabled” Specify whether to do pacing for the Predictive or IVR dialing mode. When pacing is not performed for the IVR dialing mode, the number of dialing will be limited by the maximum channel value (Maximum value of simultaneous calls that originate from the dialer.) The maximum channel value and the detail of pacing settings are configured in the ACD Dialer settings.

Default Multiplier	Specify the default multiplier of outbound calls. Specify the default multiplier value for the calls made in the Predictive or IVR dialing mode with pacing and the multiplier is enabled.
Multiplier Threshold	Specify the threshold value to apply the multiplier. When the number of free agents exceeds this setting value, the multiplier is applied to the remainder. If the number of free agents is below this setting alue, the multiplier is set to 1.
Minimum multiplier	Specify the minimum multiplier that varies by pacing.
Maximum multiplier	Specify the maximum multiplier that varies by pacing.
Transfer To	Specify the call destination. In case of Predictive Dialing, specify the destination to transition to when the call cannot be connected to an agent. In case of IVR Dialing, specify the destination where call will be forwarded immediately after connecting. Usually the destination is an IVR number or the ACD ID
AMD Forward to	When AMD (Answering Machine Detection) is used, speicfy the forwarding destination when Answering Machine has been detected.
Project Screen Type	Type of project screen. Specify the project screen used by the dialer. The project screen will be displayed when connected to the call via CIM client. If you wish to use the standard project screen by Brekeke CRM, set this value to “Standard Project Screen”. If you wish to use the project screen from an external application such as the third-party CRM, set this value to “External Application”. Please set to “Not Used” if you wish to not use the project screen at all.
Third-party Application URL	The URL of external application. When the project screen type is set to “External Application”, specify the URL of the external application.

	If you wish to pass the phone number and customer information field data, specify the following variables in the URL parameters: #customer# (Call list record) #crm:<field name># (Customer information field) [Example]: http://application-address? telno=#customer#&name=#crm:name#
Receive Results from Destination	Specify whether or not to receive the call processing result notification from the destination where the call was transferred to when the dialing mode is set to predictive, progressive or IVR. When it is set to “Yes”, the processing result will be finalized based on the result notification for example from the project page after connecting to the call. If set to “No”, the processing result will be finalized automatically once the call is connected.
Apply	Apply the changes made to the settings on this page.

7.5.2. Schedule Settings

Manages the schedule settings for the dialer.

This setting cannot be changed while the dialer is running.

Display Field

Field	Description
Start Date/Time	The start date and time for the dialer. If it reaches this date while the dialer state is set to “Idle(or Waiting)”, the dialer state becomes “Running” and the dialing work is started.
End Date/Time	The end date and time for the dialer. If it reaches this date, the dialer stops automatically if it is running and the dialer state becomes “Expired”.
Working Hours	Working hours for the dialer. Specify the hours of dialing work out of a day, 24 hours. If you specify 00:00 – 00:00, then the dialer runs full time 24 hours.

	Use “Add” button to specify multiple working hours. While the dialer is running, the dialer state becomes “Running” during the time specified in this setting but while it is out of the time range, the dialer state becomes “Non Working Hours” and the dialing is not performed.
Timezone	Enable and disable the feature to specify the allowed calling hours for each timezone.
Per Timezone Configuration	Configure the calling hours for each timezone using its hours using the timezone The pattern specified in “Main Menu > Settings > timezone” is used to determine the timezone of the calling number and if it's outside of allowed calling hours, the dialer will not call the number.
Apply	Apply the changes made to the settings on this page.

7.5.3. Redial Settings

Manages the redial settings for the dialer.

Display Field

Field	Description
Maximum Attempts	The maximum attempts of dialing to the same call list record. Even after this maximum attempts were tried, if the processing result for the call list record does not complete, the call list record state will transition to “Completed” and it no longer dials the number. When set to “0”, the max call number will be unlimited.
Include Busy Signal	When unchecked, the calls with a busy signal will not be included to the call attempts, if checked, the call with a busy signal will be counted towards the maximum attempts.
Max Attempts per Day	The maximum number of calls to the same call list record in a day. Even after this maximum attempts were tried, if the processing result for the call list record does not complete, the redial process will be carried forward to the following day.

Redial Interval (Busy)	The redial interval in the case of a busy signal. If the call list record processing result is busy, it will automatically schedule a redial. When it is set to “Not Specified”, the redial is not scheduled and it goes through the normal processing cycle. When set to “Same Day”, the redial is scheduled after the specified time(minuets) passed. If the redial is automatically scheduled based on this setting, round-robin feature is not applied and the same phone number is used to schedule the redial.
Redial Interval (Others)	The redial interval for other cases. Configures the redial interval when the call list record processing result is other than busy signal. When it is set to “Not Specified”, the redial goes through the normal processing cycle. When set to “Same Day”, the redial is scheduled after the specified time(minuets) passed. Unlike the busy signal, the redial is not done on a priority basis, is not necessarily recall is done on a priority basis on a certain time, the redial goes through the normal processing cycle. When set to “Next Day or Later”, the call back is not done on the same day. On the day after the last call date, using the next processing cycle to redial.
Interval Duration for Redial Scheduling	The duration of a redial schedule slot. Specify the duration of a redial schedule slot created by specifying the date for the redial scheduling from the agent screen (15 min, 30 min , 60 min). Used with the combination with the maximum redial numbers per slot. For example, if the interval slot is set to 60 min and the number that can schedule redialing is set to 10 per slot, then the possible number of redial schedules in one hour will be 10.
Maximum Redials per Slot	The number of maximum redials for one redial schedule slot. Display the warning to agent that the number of redials for the

	same slot has already been reached to this setting value when agent schedules a redial by specifying dates from the agent screen. In that case, the agent reschedule the redial by changing the time or forces to schedule the redial and complete the work. This is a function that prevents over-scheduling redials during a set of time slot when scheduling the redial specifying the date/time.
Round-robin Feature	Round-robin feature for the call list record. If this is set to Enabled, rotate the phone number 1 through 3 every time the call is made. If the last processing result is busy, then it does not rotate.
Apply	Apply the changes made to the settings on this page.

7.5.4. Result Flag Settings

Configures when to switch the behavior of the dialer depending on the total number of contact results.

Display Field

Field	Description
Contact Result	Display each “Result” values for contact results as a section (“Compete” and “Incomplete” as a default) and you will be able to configure the following values for each option.
Change to Preview Dialing Mode	Number of flag to change the mode to preview dialing mode. If contact results for the Result field select option reaches this setting value while the dialer is running, the dialing mode is changed to preview. When set to “0”, this value becomes invalid.
Stop Dialer	Number of flag to stop the dialer. If contact results for the Result field select option reaches this setting value while the dialer is running, the dialer is stopped. When set to “0”, this value becomes invalid.
Include Call List Only	When checked, only the contact results for the current call list record are totaled.

	When not checked, all contact results for the project are totaled.
Apply	Apply the changes made to the settings on this page.

7.5.5. Event Settings

Execute scripts using the dialer's event type as a trigger.

Display Field

Name	Description
DestinationStateChanged Event	
Script	Function name of the script to be executed. Specify in this format: <ScriptName>.<FunctionName> For more detail on scripting, please refer to the "Main Menu > Scripts".
Parameters	Parameters for the script to be executed. Please specify the parameters required for the script being executed.

7.5.6. Manage

Start or Stop the dialer.

Display Field

Field	Description
Start and Stop Dialer	
Start	Display when the dialer is stopped. When the “Start” button is clicked, the dialer state will be transitioned to “Waiting”, “Active” or “Inactive Hours”. The dialer will not start if the end date/time configured in the Schedule settings is passed.
Stop	Display when the dialer is running. When the “Stop” button is clicked, the dialer state will be transitioned to “Transitioning to Stop” temporarily and wait until the call list processing in progress completes. The dialer will stop after all the processing completes but if the process does not complete for one hour, the dialer will be force

	quit automatically.
Force Quit	Display when the dialer state is set to “Transitioning to Stop”. When the “Force Quit” button is clicked, destroy all the processing results for the calls being awaiting to be completed as “Defects” and the dialer is stopped immediately.

7.6. Settings

7.6.1. Project

Modify basic project configuration name and project description.

Display Field

Field	Description
ACD	Specify the ACD that is used for inbound calls for the general category. If ACD is tied to a project, the users assigned to ACD is given access to the project page. In addition, if Brekeke CRM is specified as the inbound calls processing application, the project page pops up automatically based on the DNIS and routed ACD when Agent receives a call. ACD configuration is used for auto assigning work as above, the same ACD cannot be specified for multiple projects unless DNIS is defined in the Inbound setting. If ACD is undefined, the project disables the generic project feature.
Project Name	Specify the Project Name
Project Description	Specify the Project Description

7.6.2. Inbound

Configure the general inbound calls.

Display Field

Field	Description
DNIS	Specify the DNIS that is used for inbound calls for the general category.

	Specify if you wish to process inbound calls through the configured ACD from a specific DNIS. When it is set to blank, all inbound calls through the configured ACD are processed in this project. You will not be able to specify the ACD and DNIS that are same as the ones set for other projects.

7.6.3. Outbound

Configure the general outbound calls.

Display Field

Field	Description
Originating Number	Specify the caller ID number for the outbound calls for the General category. Specify the originating number when dialed from PBX by the dialer.

7.6.4. Contact Results

Configure the fields for the contact result record for the project independently.

By default, the "Inherit From Workspace" checkbox is selected, please remove the check mark if you wish to set up the project specific results.

Please refer to “Workspaces > Projects > Contact Results Settings” for more information on how to use this page.

7.6.5. Project Screen

Specify the project screen layout for each project.

By default, the "Inherit From Workspace" checkbox is selected, please remove the check mark if you wish to set up the project specific setting.

Please refer to “Workspaces > Projects > Project Screen Settings” for more information on how to use this page.

7.6.6. TSP

This screen is used to configure whether or not to create and use the talk-script for the project independently.

By default, the "Inherit From Workspace" checkbox is selected, please remove the check mark if you wish to set up the project specific settings.

Please refer to “Workspaces > Projects > TSP Settings” for more information on how to use this page.

7.6.7. Forwarding IVR

Specify the Forwarding IVR for the project.

For the projects where the Forwarding IVR is configured, the Transfer to IVR button displays on the project screen and the transfer operation to the IVR by the agent will be simplified.

This feature can be used, for example, when you wish to run a recorded message while a customer leaves a message to the voicemail.

7.6.8. Scheduled Processes

Execute scripts on a regular basis using the scheduler.

This feature allows you to automate tasks such as importing the call list from the external database.

Display Field

Field	Description
Script	Function name of the script to be executed. Specify in this format: <ScriptName>.<FunctionName> For more detail on scripting, please refer to the "Main Menu > Scripts".
Parameters	Parameters for the script to be executed. Please specify the parameters required for the script being executed.
Schedule	Set schedule for the script execution. Specify the cron expression format.

7.6.9. Advanced Options

Configure advanced settings for the project. Use the format: “Setting Field=Setting Value”.

agentui.contact.addable.call.result

Specify the call results codes other than 'Complete' allowed when entering the contact results in the project page

10: Other than yourself, 4: Answering Machine, 15: Fax, 9: Wrong Number, 2: Equipment Failure, 8: Do not call List

agentui.auto.customer.search.target

Specify the target customer field names used for the filters for the auto customer search in receiving inbound calls.

If invalid value is specified, the auto customer search is disabled when receiving calls.

For example: name, zip_code, telno(All array elements), telno1, telno2(indivisual array element).

agentui.auto.customer.search.source

Specify the call information(CallInfo Object) properties used for the source for the auto customer search in receiving inbound calls. If invalid value is specified, the auto customer search is disabled when receiving calls.

For example, customerNumber 、 customerInfo 、 appInfo. The default is set to customerNumber.

7.7. Manage

7.7.1. Project

You can enable and disable the project, and delete the project.

When a project is disabled, the project will be non-accessible from the agent screen. When re-enabled, the projects will appear in the agent screen.

When a project is deleted, all the information in the project will be deleted. Please note that you will not be able to undo the project deletion process.

7.7.2. Access Control

Configure the access control for project.

When "Inherit Security settings from parent hierarchy" is checked, it inherits the access control settings from above. Fields on other screens are the same as main menu's access control configurations. Please refer to Main Menu > Manage > Access Control.