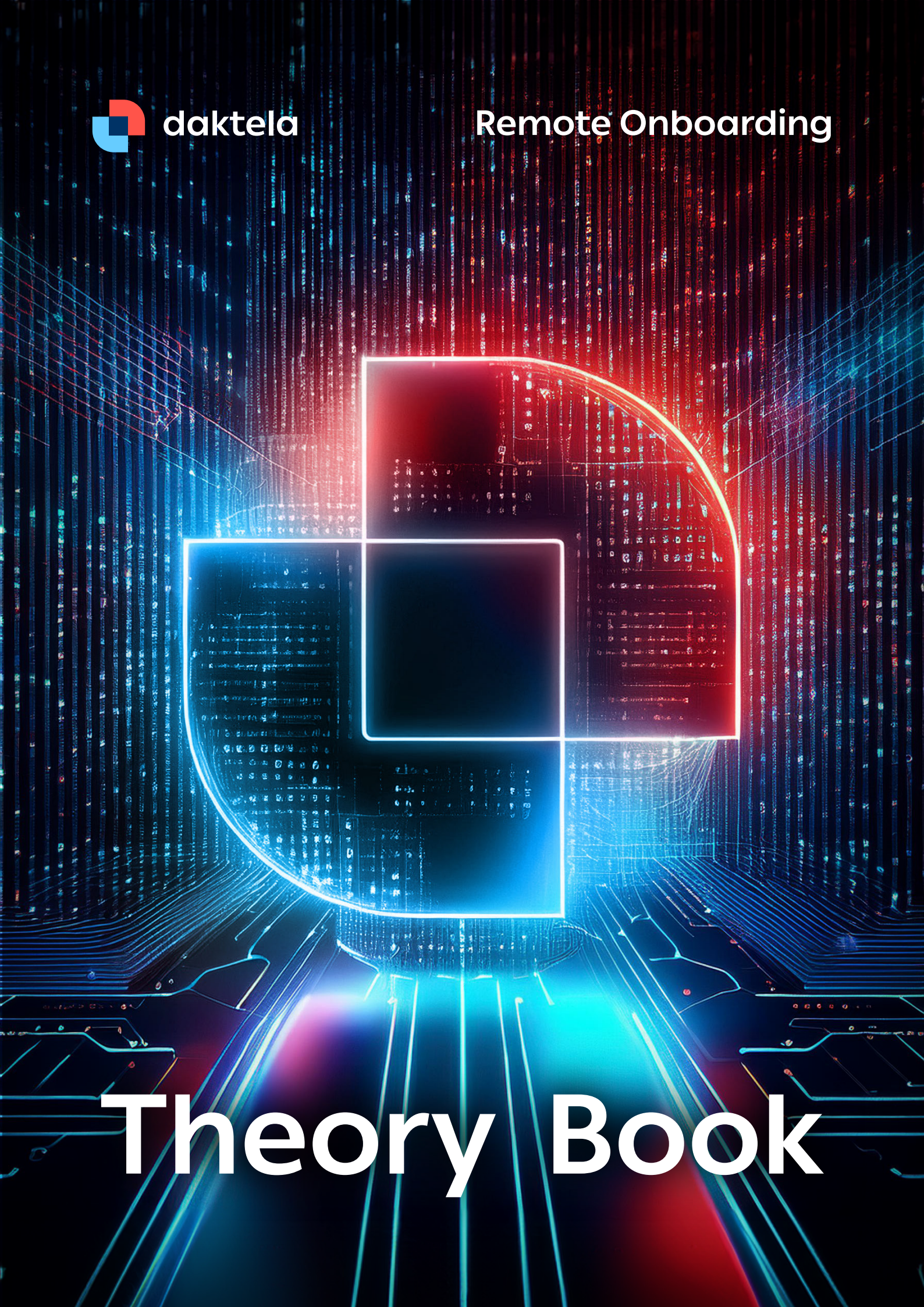
daktela

Remote Onboarding



Theory Book

Section 1: **Users**

Key skills:

- Creating and editing **Rights**
- Creating and editing **Accesses**
- Creating and editing **Users**
- Creating and editing **CRM forms**
- Creating and editing **Accounts**
- Creating and editing **Contacts**

Glossary:

Daktela User

A call centre Agent, Team Leader or Administrator, but also an accountant, the head of human resources department or an employee of Daktela itself - simply put, it's anyone with an account in our PBX.

There are three types of users in Daktela: Contact Centre Users are regular Users that can work with all the communication channels you use in your contact centre. Cloud Phone Users only work with Calls on a specific Extension and don't use Queues for call distribution. External Users work with Tickets internally and can't communicate outside the contact centre environment.

Accesses

They define which modules your Users have access to.

Rights

Rights define which specific elements within the modules your Users have access to.

A Daktela User is a call centre **Agent**, **Team Leader** or **Administrator**, but also an accountant, the head of human resources department or an employee of Daktela itself - simply put, it's anyone with an account in our software. There are three types of users in Daktela: Contact Centre Users are regular Users that can work with all the communication channels you use in your contact centre. Cloud Phone Users only work with Calls on a specific Extension and don't use Queues for call distribution. Back-office Users work with Tickets internally and can't communicate outside the contact centre environment.

List of Users

In order to access settings for your Users, after logging in head straight to Manage -> Users. You'll see a dropdown menu of all the sections available to you. Go to List of users first - this is the view where you can browse all the Users in your instance, edit their properties and add new Users. However, there are a few things we need to handle before diving further into that topic. Let's take a look at Accesses and Rights.

Accesses define which modules your Users have access to. Let's add a new type of Access intended for a generic call centre Agent. You will need a Title, but the Name and Description are optional. There's also an option to use the new Access with Back-office Users by checking this box. Click Save.

Accesses, just like most other data in Daktela, are presented to you in a list view. Apart from adding a new item, you can Filter and Search the list as well as Clone and Delete items. The columns can be sorted by clicking their headers and specific Actions available for each entry are available in the last column. In this case, it's cloning and deleting an Access. You can see the number of Users using an Access here. For each Access, separate Dashboard setups can be configured. The default for a new one includes Last Activities, Your activity today, Campaign records and the Calendar. However, the Dashboard has impressive customisation options, utilised by dragging and dropping elements from the menu on the right. We will go deeper into this subject later, but for now - the default Dashboard will serve us just fine. After clicking the name of an Access, you will start editing its settings.

Now you can click the various tabs and configure your Access. For most entries, you will have a selection to allow your Users to Access, Create, Read, Update and Delete items. Checking the first checkbox in a row checks all Accesses for that item and checking this one places a check mark in all the boxes in the view. Some tabs, like Tickets or Records, have additional fields specific to their function. Some tabs, however, like Social media or Resources have less options. Clicking here will enable Admin.

Access

As this is intended for a call centre Agent, let's provide them with Access to relevant modules, like the CRM and Tickets, but exclude the Manage module. For most tabs here, you can even decide on a specific kind of Access.

In this section, you can set up the Shortcuts that agents can see below the main menu on the left hand sidebar. The options include a Link, for which you have to, of course, input a URL and a Name. You can even change the Icon and its colour, depending on your needs. Another option is a Global search Shortcut, opening a pop-up window that allows the User to search all parts of the PBX they have access to. A Documentation Shortcut will open the official online Daktela documentation page and a New Ticket Shortcut will, of course, open a new Ticket. Add new Shortcuts and delete unwanted ones by clicking the icons on the right of the item. It's highly recommended not to use too many Shortcuts, so they don't lose legibility for your Users.

The final section in this view allows you to set up a custom GPT prompt that Agents can use in their text inputs if they have the right to use Compose Text AI Features. You can pick an Icon for it, input a Title and provide the Prompt itself. This icon allows you to test your Prompt and see how it will affect input from your Users. A simple example would be automatic translation of the input phrase into another language.

Now let's save our new Access and head on to Rights.

Rights define which specific elements within the modules your Users are able to see and control. For instance, rights to log in to Queues, view other Users' data or use specific Categories for Tickets. After clicking Manage -> Rights, you'll be presented with a list style view you're already familiar with. Let's create a new Right.

The Title will be necessary, but the Description is optional.

Just like with a new Access, you can opt in to use this Right with Back-office Users. Next, you can set the maximum number of incoming Activities that a User with this Right can have routed to them and the maximum number of Records that a User with this Right can have loaded at the same time. You can also allow a User to delete missed activities and to call without a Queue. The next setting controls Activity Transfer rights and for that, we'll need to discuss Blind and Assisted Transfers. In a Blind Transfer, your Call will be ended as soon as you click the button. The Customer will be on hold while the phone is ringing and will be connected to the new Agent as soon as they answer. The new Agent will only know the customer's name or phone number and that you have transferred the call to them.

In an Assisted Transfer, the Customer will be put on hold and you will be connected to the Agent you are transferring the Call to so you can explain to them what the customer needs. The following setting for creating a new Right, Call monitoring modes, allows you to select if and how Users can interact with Calls they monitor from the Realtime panel and also requires an explanation of some concepts. Monitoring means only listening in to Calls. Whispering lets a new Agent talk to the Agent that is handling the Call - the Customer will not hear the 'whispering' Agent. Barging is joining the call and being heard by both the Agent and the Customer. Taking over removes the Agent from the call and allows another Agent to complete it. For our new Right, we will pick Monitor only.

The next option defines the range of access to our integrated GPT functions. 'Summary' allows Users to summarise Tickets, Contacts, Accounts and Chats. 'Compose features' let Users use assisted writing features such as Expand, Friendly, Professional, Translate and others. This option allows Users to request help from their Supervisor during open Activities. With this option checked, when a User's password is changed in Manage -> Users, they will be required to change it the next time they log in. Ticking the last box allows Users to reset their passwords using their own email addresses. After you're done configuring your new Right, click Save.

Similarly to Accesses, if you click the title of your new Right now and edit it, an additional section will be available to you, with specific Rights organised in tabs you can navigate through. For now let's leave those settings at their default values, but we will get back to them once we set up more modules in our PBX.

As mentioned before, Back-office Users are Users who are not typically available online in the instance at all times, but an account gives them an option to check the updates on their Tickets at any time. Let's create a new Back-office User. The Title, as usual, is a required field. The Login name will be generated automatically as you type the Title. You can change the Login name now if you like - in fact, now is your only chance to do so. The Description is, again, optional. Set up a Password for your user and provide their Email address to enable them to receive notifications from the PBX. The next setting lets you select the CRM Contacts that will be paired with the Back-office User. You can pick more than one. The Back-office User will be able to see the paired contacts' tickets.

The following two options serve a similar distinction. Disabled Account Contacts mean that the Back-office Users can read other Back-office Users with common contacts. If you enable Account Contacts, the Back-office User can read other Back-office Users with the same account as the paired contacts. Disabled Account Tickets means that the Back-office User only sees the paired Contacts' Tickets. If you enable this field, the Back-office User sees all Tickets belonging to the same Account as the paired Contacts. You can now Save your new Back-office User.

Now that we're done with Accesses and Rights, we can cover Call permissions.

Call Permissions define rules to restrict calls to certain destinations. For instance, you might want to prevent your Agents from accidentally calling paid services or making calls abroad. This is achieved by rules defined for each entry. Let's create a new Call Permission. After entering the title, you can define precise time conditions for when your new Call permission is active. The next section allows you to define a Dial Pattern - a unique set of digits that will select this trunk. If you only used digits here, a specific number would be selected, but the field is governed by a set of additional rules. X matches any digit from 0 to 9, so this (X99 999 999) could be any of those numbers. Similarly, Z matches any digit from 19 and N matches any digit from 29. A bracket matches any digit or letter in the brackets, so in this example [12379] would match digits 1, 2, 3, 7, 8 and 9 resulting in these numbers.

A dot is a wildcard - it matches one or more characters, so this 999. would mean all possible combinations starting with 999. This symbol | separates a dialling prefix from the number. For example, this 9|NXXXXXX would match when someone dialled this „95551234" but would only pass this „5551234" to the trunks. Remember that you can always access information about Dialling rules and Dial patterns in our online documentation, as well as study the tooltips next to the relevant fields. The final field in this view lets you add one of your previously created Call permissions. Now that we're done setting everything up here, we can click Save.

A module closely connected to the work of a call centre Agent is the CRM.

You can think of the CRM as your digital address book that contains data on all your Contacts, Accounts and Records. Since both Accounts and Records are relevant when creating a new Contact, let's start from the bottom here. Records are used to store your customer data such as contracts, documents and any other supplementary information. Accounts work like groups that can contain multiple Contacts, allowing you to easily sort your CRM. Most often, those will be various companies your business is connected to. Contacts, as you probably expect, store individual contact data of your Customers or anyone else in your business network who doesn't have an account in your PBX.

Let's start by adding a new Account.

The process is quite straightforward. The title will be necessary. Each Account must be assigned to a Database, which can be selected here. If you click this icon, you'll be able to view the Details of the selected Database, Update it or Create a new one. Similarly, you can pick an SLA here or create a new SLA by clicking this icon. This setting, however, is not mandatory. We will learn more about SLAs and Databases in a minute, but for now - let's move on.

You can also assign a User to this Account and type a Description. Apart from filling out the Account's details, you can also easily upload an attachment to it. Once you're done, click Save and your new Account will become available. In the list view, you can see each Account's Database, Description, SLA and User. A new element here is the option to summarise an Account by utilising Daktela's built-in AI features.

Let's move on to Contacts and create a new element here as well. The Title and Database will be necessary as well. You can enter the Contact's details, assign them to an Account or create a new Account for them here, assign them to a User or provide a Description. Just like for Accounts, you're free to upload attachments. Click save to add your new Contact to the CRM. The list view provides you with quick access to each Contact's key info. Similarly to Accounts, you can quickly summarise the activity of each Contact.

Finally, let's head on to Records. Those are stored in Forms, and in order to add a Record, you must first set up a Form through which you'll do it. Let's go to Manage -> CRM -> Records to view all the Forms available for you to use. Let's add a new one. The Title is necessary, but the Description, as usual, is optional. You also have a choice to pick the Record tab that will be focused on opening. Click Save - now your new Form is ready to configure. You can drag and drop elements from the column on your right into the structure field here. Sections can be Titled, Described and you can choose the number of columns for the elements inside. New elements to use can be added here - for each one, you'll need to select a Type and decide whether to allow Multiple entries. You can consult our Documentation for a detailed list of Field Types describing how each of them works. Right next to Record Forms you can edit your Databases. Those influence what kind of data is saved to the CRM. Click Contacts here. Seems familiar? Those are the fields we used to create a new Contact a while ago.

You're already familiar with the form view - you can drag in elements from the right side to create a Form according to your needs. Be careful here! If you remove a field from a Form that's already been used, that set of data will be lost from the CRM. You can also encounter unexpected errors when editing a Form while someone is adding a new Contact or Account. Let's go back a step and click Accounts. As you can see, the Database Account Form is quite similar and works exactly the same.

The Knowledge Base is an excellent tool for sharing information with your Users in the form of Articles that can be easily organised, tagged and edited. Go to Manage -> Knowledge Base to configure Folders and Tags for your Articles. Folders work exactly as you'd expect - they help you organise Articles. You can easily edit any existing hierarchy by simply dragging and dropping as well as add new elements by clicking here. Each item can be duplicated, cloned or deleted. This icon brings you straight to the Rights settings for the Folder, allowing you to decide what Rights owners are able to interact with the information and in what way. Tags are yet another way to keep your Knowledge Base well organised and easily accessible. In the list view, you can see how many Articles each Tag was used in. Similarly to Folders, Tags can be quickly duplicated and deleted. However, you also have an option to import and export your Tags.

Now let's go back to the Knowledge Base and try to add a new Article. A Title is mandatory, as well as selecting a Folder to store your Article. By checking this box you're opting to publish your Article - you may want to do that instantly or at a later time. This is where you can pick from previously configured Tags. A description is optional and the content is, of course, why we're here! Daktela offers quite extensive text editing options to make sure you can customise the Article according to your needs and preferences. Don't miss the AI Actions button - it enables you to utilise the integrated GPT functionality to improve your input on the fly. It's highly recommended to try out the various options here for yourself in order to understand how they work and how each of them can be useful in a User's workflow. Remember the custom GPT prompt we were setting up in Accesses earlier? Well, here it is as well! Click Save once you're ready.

Section 2: **Helpdesk, Email and Tickets**

Key skills:

- Helpdesk
- SLA and Categories
- Email Queue
- Email Routing
- Email Templates
- Tickets, Ticket Views and Macros

Glossary:

Helpdesk

A request management system that consolidates all requests and inquiries from various sources into a single location. From this central hub, individual requests are then assigned to users based on their workload.

Ticket

A Ticket is an overview of Activities connected in one thread. The ticket can include emails, calls, SMS or any other available Activity. It allows you to keep an overview of the progress and resolution of a given request. A comment can also be a part of a Ticket.

SLA

An SLA, or Service Level Agreement, is a rule for calculating the deadline (Resolution) and the first response (Reaction) to the Ticket that the Agent has for each priority. A ticket response is an activity that tells the customer what is being done to resolve it.

Macro

Macros are shortcuts for multiple actions used to group interactions with Tickets, directly saving your time.

Time Group

Time Groups enable you to set up your business hours, bank holidays and any other time intervals you need. You will use these to route your Calls, SMSs and Chats in Time Conditions.

Template

You can think of Templates as presets containing often used text, such as confirmations, signatures and NPS surveys.

What's a Helpdesk?

A helpdesk is a request management system that consolidates all requests and inquiries from various sources into a single location. From this central hub, individual requests are then assigned to users based on their workload. Once a Ticket is assigned to a User, it is moved from the central collection point to that User's designated area. The purpose of the Helpdesk is to facilitate the differentiation between unprocessed, processed, and resolved requests, and to present individual Users with only the Tickets that are relevant to them.

You can set up the name of your Helpdesk in Globals. You can use more than one Helpdesk, separated by a semicolon, but each one has to have a unique name. We can test the uniqueness of the name here: https://tools.daktela.com/indexer/helpdesk-registry - the link is provided in the description as well.

Email Queues

Before we analyse how Emails are handled in Daktela, we have to discuss Tickets. A Ticket is an overview of Activities connected in one thread. A ticket can include emails, calls, SMS or any other available Activity. It allows you to keep an overview of the progress and resolution of a given request. Let's go to the Tickets module to display a list view of all the Tickets available to you. Click a Ticket's Title to display its details. Here you can see the Ticket's Contact and the Account assigned to it, as well as information on the last person to edit it, along with its date of creation and last edition.

On the right hand side, you can see the Ticket's Title, Deadline and the selected time at which it will reopen. All Tickets in Daktela must be assigned to a Category - you will learn more about those in a second. All Tickets also need a Priority and a Stage. You can manually assign the Ticket to another User and set its Followers. Additionally, it's possible to add Statuses to Tickets - you will learn more about those shortly as well. Below the top section, you will find a list of Activities for the selected Ticket. A comment can also be a part of a Ticket's Activity history. Commenting is used for internal communication regarding the given request, which is unavailable for Customers and can only be seen by Users.

Tickets and Categories

In Daktela, all Emails must be part of a Ticket. When you send a new Email and don't assign a Ticket to it, a new Ticket will be created automatically. Every new Ticket in Daktela needs to be assigned to a Category, so it's crucial that you properly set these up. Let's go to Manage -> Tickets-> Categories.

You're already familiar with the list style view. Let's add a new Category. The title is necessary as well as an SLA. If you don't have one, you can quickly create a new one by clicking here.

Statuses

Statuses are used to set what happened during an Activity or in a Ticket, what its outcome is or what its progress is in a certain process. Let's go to Manage -> Settings -> Statuses to access a list of your Statuses. You could use an existing Status as a template for your new one by clicking Clone in the Actions column, but we will click here to create a new Status from scratch.

You will only need a Title, with an option to provide a Description, select a Blacklist, check advanced options for Records and pick a colour for your new Status's flag. Click Save.

To edit a status, click its title in the Status list. Before being able to use your new Status, you will have to choose which Categories, Queues and CRM Record Types you'd like to use it in by clicking the shortcuts in the Relations column.

SLA

An SLA, or Service Level Agreement, is a rule for calculating the deadline (Resolution) and the first response (Reaction) to the Ticket that the Agent has for each priority. A ticket response is an activity that tells the customer what is being done to resolve it.

Select a Title and Units to be used in the new SLA. You can define different resolution times for three levels of priority - Low, Medium and High. The following activities within the Ticket are taken as a response: Outgoing email, answered Call, SMS, WhatsApp or Viber message. It's important to know that the SLA deduction only runs during the set business hours. Click Save.

Ticket Category continued

Apart from the mandatory settings, there are more interesting options at your disposal. You can pick Queues in which the Ticket Category will be used, require a Status when closing a Ticket and allow multiple Statuses. If you check this box, you'll have to close all Child Tickets before closing a Parent Ticket. This field allows you to define the number of days after which closed Tickets will be automatically archived. The last option lets you choose on which tab the view should be autofocused.

Now that we have a new Ticket Category, we need to make sure that the right Users have the Rights to use it. Go to Manage -> Users -> Rights and select one of the relevant Rights to edit. Open the Categories tab and select your Category. Distribution allows you to choose when to distribute a Ticket to Agents that use this Right when a ticket with no assigned User is created in the Category. You can select the maximum number of Tickets that an Agent can have in order for the Ticket to be assigned to them. If several Agents use this Right, the Ticket will be assigned to the one with the fewest Tickets in the Category. Selecting 'none' disables Distribution. Let's save the changes we've made here and continue setting up our Email handling capabilities.

Ticket Views

Another important concept to cover in order to process Email communication in Daktela effectively are Ticket Views. They act as predefined Ticket filters which can make work very easy for your Users.

In the Tickets module, they're displayed on the left side as a list. Let's go to Manage -> Tickets -> Ticket views to set up that section. They're configured for each Right separately, so let's pick one first. We assign views by dragging and dropping them from the panel on the right. You can change their order and hierarchy by dragging and dropping as well. Click here to create a new Ticket View. After typing a Title, you can configure it as you wish. For instance, it can display tickets from a specific User, all except from closed ones, with a specific Category. You can also configure the View's sorting, Colour settings and Default settings for new Tickets in this view. Click Save. The new Ticket View is now available for the Right you selected while creating it.

Ticket Macros

Macros are shortcuts for multiple actions used to group interactions with Tickets, directly saving your time. Let's go to Manage -> Tickets -> Macros for a list view of all your Macros. We will add a new one by clicking here. A Title is necessary, as well as specifying the Macro's position in the Macro list. Below is a familiar setup view with drag and drop functionality. For instance, you could have a Macro that sets a specific Category, Priority, Saves the Ticket and takes you back to the Ticket list view.

Queues - Email Queue

A Queue is a system that manages the flow of incoming Calls, Chats, and Emails in an organised manner. When a new Activity arrives, it enters a designated Queue and awaits its turn to be assigned to an Operator. Let's create a new Email Queue.

Go to Manage -> Queues to see a list view of all the Queues available to you. Click here to add a new item and select the Email Queue. You'll need a Title and a Unique Queue Number, but that will be automatically suggested for you. In the Advanced settings, you can select whether the Queue is active and utilise a variety of other options. Sender info, Sender address and the Reply-to header are great ways to customise how your Email communication works. We will cover Working hours and Templates in a couple minutes, so don't worry about them for now. Wrapup time allows your Agents a certain amount of time before another Activity in that Queue will be assigned to them. You'll also need to configure your Incoming and Outgoing servers, as well as pick a Category for the Tickets in this Queue.

Routings - Email Routing

Email routings can be used to set up rules that define what happens to your emails before they reach the Tickets module. Typically, you will use that feature to send unwanted Emails to a specific Category, automatically prioritise key communication from VIP customers or send complaint emails straight to the customer support department. Let's head to Manage -> Routing -> Emails and proceed to add a new Email Routing. You'll need to pick a Title as well as the Direction of the new Routing - Incoming, Outgoing or Bidirectional. Next, you can set up the filtering by defining a set of conditions out of which all must be true and/or a single condition that must be met. For instance, we can set it so all emails from a specific Customer that contain words like 'complain' or 'error' are given a High Priority and assigned to a specific Agent.

Graph

Let's take a more visual approach to understanding how Emails are processed in Daktela. The first thing that happens is a new Email from your Customer arriving in your mailbox. The Email Queue fetches that Email from the Inbox, assigns it to a Ticket. Next, Email Routing adds parameters to the Ticket, like a Category, Status, Stage, Priority or a User. Finally, the new Email ends up in the general pool of Tickets in the system, properly described and catalogued. A User will be able to interact with that Email depending on their Rights to a relevant Category. For Tickets filtered down through a View, the same rule applies - Rights define the User's capability to view and interact with the Email.

Time Groups

Time Groups enable you to set up your business hours, bank holidays and any other time intervals you need. You will use these to route your Calls, SMSs and Chats in Time Conditions.

Go to Manage -> Settings -> Time Groups to see a list views of all the Time Groups you have access to. Let's create a new one. The Title, as always, is necessary. You can also give the new item a Description and Group it with other items. The following field allows you to define the details of your Time Group by specifying its Open conditions, meaning when the Group is active, or its Closed conditions meaning the opposite - when the Group is inactive. For instance, we can define a Time Group that is Open during standard working hours, but Closed during a previously configured set of bank holidays. This topic, along with an additional example, is covered in our Documentation.

Templates

You can think of Templates as presets containing often used text, such as confirmations, signatures and NPS surveys. Let's go to Manage -> Settings -> Templates to see a list of Templates available to you. As you can see, you can use them in various types of Activities. Click here to create a new Template. A Title and Type selection will be necessary here. By default, the new item will be visible to all Users, but you can assign it exclusively to a specific user here. The possibility of parenting Templates allows you to group them and assign them to Users in bulk. An interesting feature is utilising data from an external URL, which you can input here. The last option is to decide whether to use Plain or Rich formatting.

Rich formatting allows for truly extensive styling of your communication! What is more, this field supports variables to make Templates even more useful. For instance, this {{user.title}} variable will return the name of the currently logged in User. For a more detailed explanation on how variables work, you can click here for a direct link to this topic in our Documentation. After Saving, your new Email Template is ready to be used. Head on to your Queues, select the Queue you'd like to use it in and select it in the Signature template field.

Section 3: **Webchat and Chatbot**

Key skills:

- Web chat Queue
- Web chat Template
- Terminations
- Time Groups and Time Conditions
- Decision Trees

Glossary:

Webchat

An online service that allows users to communicate in real-time using text or multimedia messages through a web browser. It is commonly used for customer service support and online sales.

NPS

Net Promoter Score is a metric used to measure customer loyalty and satisfaction based on a single question: "On a scale of 0 to 10, how likely are you to recommend our product/service to a friend or colleague?" Respondents are categorized into Promoters (score 910), Passives (score 78), and Detractors (score 06). The NPS is calculated by subtracting the percentage of Detractors from the percentage of Promoters to give an overall score ranging from 100 to 100.

Termination

Termination allows you to decide how the chat activity ends in various scenarios - due to activity timeout, contacting your business outside of working hours or stemming from a Decision tree.

Time Conditions

In time conditions we can set a condition for routing based on the time interval (when we want to be available for customers - e.g. according to the working hours of the contact center / agents), which we define in time groups.

Automessages

They allow you to automatically send certain messages to your Customers - for instance, product information while the Customer is waiting in a Queue to connect to an Agent.

Technical information

A Web chat is an online service that allows users to communicate in real-time using text or multimedia messages through a web browser. It is commonly used for customer service support and online sales.

A chatbot is an algorithm designed to simulate conversation with human users. Chatbots are programmed to understand questions, provide answers, and assist users with various tasks. They can be used for customer service, information retrieval, or even as virtual assistants.

Let's take a look at a visual representation of how Web chats are handled in Daktela. Incoming communication first goes through Time Conditions - for example, the system can check if it's a bank holiday and if the current time is within your business' working hours. Next, the new chat goes through Decision Trees, which help you sort the communication according to a set of options and variables defined by you. Finally, the new activity can be directed to a specific Queue, User or simply be terminated.

Daktela web chat doesn't use cookies - it stores all the necessary data in the browser's localStorage or sends requests directly to the server. Our web chat doesn't use any third party libraries or scripts, either and doesn't use any identification techniques for marketing or other purposes.

Queues

You're already familiar with the concept of a Queue from previous sections. Let's go to Manage -> Queues and create a new Web cat queue. As usual, you'll need a Unique number for Queue, but it will be suggested for you. A Title is mandatory as well. Advanced settings below provide you with multiple interesting options of customising the new Queue, like setting a Maximum waiting time for your Agents, allowing your Agents a short break between activities through Wrapup time or sending a missed Activity notification to an email account. You can hover over tooltips at each field to get detailed information about their functionality and, of course, visit our extensive online Documentation as well. If you checked Missed activities above, a set of new options will become available to you, letting you select for how long missed activity notifications stay in Missed activities and adjust Queue options for Missed activities. The last option allows you to select a category that will automatically be assigned to Tickets created in activities using this Queue.

Templates

Just like for Emails, you can utilise Templates for Web chats, saving you time by allowing you to save frequently used text, such as confirmations or signatures. Let's go to Manage -> Settings -> Templates and create a new Web chat template. All you have to do is select Chat in this field and configure the Template to your liking - just like you did for the Email templates in the previous section. However, only Plain text will be available to you in this mode.

NPS

Net Promoter Score is a metric used to measure customer loyalty and satisfaction based on a single question: "On a scale of 0 to 10, how likely are you to recommend our product/service to a friend or colleague?" Respondents are categorised into Promoters (score 910), Passives (score 78), and Detractors (score 06). The NPS is calculated by subtracting the percentage of Detractors from the percentage of Promoters to give an overall score ranging from 100 to 100.

Net's go to Manage -> Settings -> Templates to create a new Chat NPS Survey. You can select this type from the dropbox right here. The Content is pre-filled for you, which you can see after selecting rich formatting. After typing in a Title, you're ready to Save your new NPS Survey.

Now go to Manage -> Routings -> Web chats and select a Routing you'd like to edit. After allowing an NPS survey here, you can select your newly created NPS Survey from the dropdown menu. It will be displayed after the chat ends.

Routing

Just like other Activities in Daktela, Web chats need a Routing set up in order to work properly. Let's go to Manage -> Routings -> Web chats and deal with that now.

Connectors

You will see a familiar list style view with all your Web chat routings. You can view a diagram tree of each connector by clicking this icon in the Actions column. Let's create a new Routing. A Title and a Language will be necessary. It will also be important to select where the Web chat will be routed. Let's select our Web chat Queue as the destination. Here, you can decide if the Customer will be able to see the Agent's profile picture and name.

The Client settings section provides you with a number of practical options to utilise. They're all described in their tooltips as well as in our extensive online documentation. The Default inputs section specifies the information needed from the Customer to initialise the Web chat. Finally, you're able to design the exact look and style of your Web chat window. Once you're done, click here to get a code snippet ready to use on your website.

Automessages

Automessages allow you to automatically send certain messages to your Customers - for instance, product information while the Customer is waiting in a Queue to connect to an Agent. Go to Manage -> Routings -> Web chats -> Automessages and click here to create a new one. As usual, you'll have to give it a Title. It will also be necessary to select the Next destination, which is usually a Web chat Queue. You can set up multiple messages to be displayed at different time intervals measured from the second the activity was routed to this Automessage.

Decision trees

Use decision trees to set up your web chat. Go to Manage -> Routings -> Web chats -> Decision trees. You will see an overview of your Decision trees. You can view a diagram tree of each decision tree by clicking the tree button in the Actions column. Click the Title of a decision tree to open its details or click Add new to create a new decision tree. The decision tree editor will open. It will display a diagram of individual decisions. When creating a new decision tree, you will only see the first step, "Welcome message". Click a decision to select it, then click the edit button on the right hand side. The decision details will open.

Fill out the decision Title and Description (optional) in the header, then set up your decision. You can use all available objects – we recommend reading through the templating language documentation. Drag and drop items from the Actions, Groups and Targets into your decision. We recommend entering a description of each item as you add them. Elements at your disposal are grouped into three sections on the right: Actions, Groups and Targets. Let's go through them one by one.

By using Request, you can set a request for data from a provided URL. Fill out the URL address where your data is stored and name the object that will contain the returned data so you can display it in the chat. This element allows you to send a message in the voice chat - you can even pre-configure some translations for the message and the customer's language will be detected automatically. You can also describe and save our own data for later use - simply enter your data in the Value field and enter a key that will load the data under Key name. To use your data in a message or a request, simply enter the Key name, like this. You can also create a Ticket - with the options to give it a Title, Category, Response and a Comment.

Let's move on to Groups. The Condition element lets you set up conditional actions. First, set up your condition parameters, click Done and then drag and drop actions into the fields that are now available in the new condition. Loop allows you to walk through array items. If you use the action Target, the loop ends.

The goal of Targets is to define the next destination for your Web chat. Select if the target is another decision in the tree or a final target such as a Queue or a Time condition. If you go for Decision, choose a target decision from the drop down list or click the blue plus button to add a new decision. After typing the new decision name, you'll be able to edit the new decision in the diagram once you save the current one and return to the decision tree editor. If you select App instead, choose the target type and the target itself. You can also select whether to go to the target as soon as the customer reaches the decision or if action from the customer's side is necessary.

Terminate

Termination allows you to decide how the chat activity ends in various scenarios - due to activity timeout, contacting your business outside of working hours or stemming from a Decision tree. You can make that selection here. Choose the Queue to use the Termination in and pick an Auto response to be used. If you check this box, activities terminated this way will count as Answered instead of appearing as Missed.

Transferring and Inviting

To transfer a web chat, go to the Web chat widget in the Web chat tab. Click the Transfer button. This will open the Transfer activity window. Select where to transfer the web chat. You can choose a specific person or a queue. Click Transfer. Your Web chat will end and the customer will be transferred.

To invite another agent to a web chat, go to the Web chat widget in the Web chat tab. Click the Invite button. This will open the Invite to activity window. Select who to invite to the web chat. You can choose a specific person or a queue. Click Invite. You and the agent you have invited will now both be chatting to the customer. When one of the agents closes the chat, the customer will see a notification but will continue to chat to the other agent.

Section 4: **PBX**

Key skills:

- SIP Devices and SIP Trunks
- Software Phone
- Inbound and Outbound Call Queues and Routings
- Notifications
- IVR
- Time Conditions

Glossary:

PBX

Unifies the exit points of all internal devices into the public telephone network.

Extension

A unique User identification in Daktela – a number that is mandatory for every User. It can only be changed when the user is logged out.

Device

Takes care of the technical side of calls. It can be an internal hardware SIP phone, an internal software SIP phone or an external phone.

IVR

The Interactive voice response system is used to guide callers to the correct department or person by selecting a number from a list of options.

PBX

A PBX, or Private Branch eXchange, unifies the exit points of all internal devices into the public telephone network. Internal devices can call each other, but if a proxy server isn't set up properly, we are not able to call out from the instance. In order to make this connection we must create a SIP trunk.

SIP

A Session Initiation Protocol is a communication protocol by which devices exchange information on how to connect to each other. A SIP user is connected to the SIP server (PBX). A SIP trunk is the connection between a SIP device and the PBX - with both using the same Session Initiation Protocol. Remember: the Device is creating a connection to SIP, not the other way around.

Devices and Extensions

What is the difference between an Extension and a Device in Daktela? An Extension is a unique User identification in Daktela – a number that is mandatory for every User. It can only be changed when the user is logged out.

A Device is what takes care of the technical side of calls. It can be an internal hardware SIP phone, an internal software SIP phone or an external phone.

Remember - a Device is not Reachable – only an Extension is. A User can have several Devices assigned to them at once - for instance, a hardware SIP phone in the office and a personal mobile phone - and specify how long a Call will ring on each of them.

SIP Device

Now, since the SIP device is responsible for the whole connection with the PBX, it will have to be set up first. Let's go to Manage -> Devices -> SIP devices. In a familiar list view, you'll see all the Devices available to you. Let's add a new Device. A unique number will be necessary and you won't be able to change it after saving. It will be needed later to log in to this Device. A Title, which will be displayed in your device list, and Password to later enter in your hardware or software phone settings, will also be necessary. Key settings will be pre-filled for you, but it's important to note that you have access to a number of interesting features here.

You activate voicemail on the SIP device and then access it using a feature code. The default code for accessing your own voicemail is *97. It's also possible to secure your voicemail with a PIN, provide an email address for notifications and even attach the voicemail to your notification email. By checking this box, you opt to delete the voicemail after it's been sent. You can also make this device available for agents to select dynamically from the navbar instead of assigning it to a User by clicking here. Click Save.

Once you're done configuring your new Device, you can assign it to a User in Manage -> Users -> List of Users. Simply click a User, go to Devices and add your new Device in the available field. If the Device is available for dynamic selection, it will be selectable in the Navbar.

Outbound and inbound routings

As you already know, a Routing is a distribution setting, sorting Activities based on predefined rules and conditions. While configuring your PBX, setting up Routings properly is essential.

Inbound routing

Let's start with the Inbound Call Routing. Inbound routings allow you to set up the destinations which your PBX will use for incoming calls. When a call comes in from the network, the dialled number and caller number are checked and used to direct the call to a device or application that you select.

Let's go to Manage -> Routings -> Calls and add a new Inbound Routing. The Title is, of course necessary. Out of the options available here, it's worth noting that you can match a specific DID number - leaving this field blank will match numbers with any or no DID info. Another key element is setting the Next destination for the Calls that meet the conditions specified above. Out of the options available, you will most often simply use a Queue, but you can also Terminate the Call or direct the connection to a specific User, Time Condition, Announcement, IVR or a Custom context. Click Save when you're ready and let's move on to Outbound Routings.

Outbound routing

Let's create a new Outbound Call Routing. The Title is mandatory. You will also need to specify Dialling rules - you should already be familiar with this concept from Section 1. However, if you do need help, remember the tooltips in Daktela and our documentation, which describes the topic extensively. You can select which Users, Queues and Devices will be able to use the outbound Routing. If you leave the fields blank, all Users, Queues or Devices will be able to use it. You can also define which Users, Queues and Devices have access here by using Regular Expressions. Here, you can select a SIP trunk to use with the routing. Click Save.

System Recordings

Since the remaining two topics in this section, Announcements and IVR, both utilise System Recordings, let's take a look at those first. In Routings -> Calls, click Advanced Settings and then System Recordings. Create a new element. All you will need is a Title and, of course, an audio recording itself. You can record or upload your own Recordings as well as pick from a list of pre-loaded files. After selecting the first one, you can add more Recordings and chain them in a sequence.

Announcements

Using Announcements, you can play back a Recording to the caller. The Title is necessary. Here, you can pick the Recording to use or instantly start creating a new one. You can also choose the next destination, picking from options you're already familiar with. Among other options, you can allow the caller to skip the Announcement by pressing any button or configure a special button to press in order to repeat the Announcement. Remember that this instruction should be included in the Announcement itself. Once you're done, click Save.

IVR

The Interactive voice response system is used to guide callers to the correct department or person by selecting a number from a list of options. You can set up what options the customer will hear, what the IVR will do in case of invalid or no selection and how many times the whole process can be repeated.

Let's set up a new IVR. A Title and Shortcut are mandatory. Here, you can select the Recording to be played at the beginning of each IVR loop, define how long until a Timeout Recording is played, choose a Recording to be played if the caller presses an invalid number, the amount of loops to be played and a maximum acceptable number of digits.

Below, configure various destinations based on the caller's choice. You can use digits from 1 to the max number you defined above, but also utilise special characters "i" for "invalid" and "t" for "timeout". You're already familiar with the list of options for Destinations. For each item, you can also opt out of recording the call if the caller presses a given digit. Once you're done, click Save. Your new IVR is now ready to be used.

Section 5: **Passive Call Centre**

Key skills:

- Inbound and Outbound Queues
- Pauses
- IVR

Glossary:

Passive Call Centre

Unifies the exit points of all internal devices into the public telephone network.

Call Steering

Using call steering, customers can simply say which person or department they want to speak with and the application connects them.

External Device

An External Number, as the name itself suggest, is an external number like a mobile phone, that we can assign to a specific User. Incoming calls to this User can then ring on this external device.

A Passive Call Centre is one that mostly receives activities, as opposed to running outgoing activity campaigns. For example, an instance dedicated to mostly customer support or technical assistance.

Queues

Let's go to Manage -> Queues to start setting up our Passive Call Centre. You're already familiar with this view - it contains all the queues you can work with, allowing you easy access to editing, deleting and creating new Queues, as well as filtering all the items on the list.

Inbound call queue

Let's add a new Calls Inbound Queue. A Unique Queue number will be pre-filled for you, but a Title will be necessary. In the Advanced settings, you can enable Agents to enter a description of an Activity by activating the description field. Here, you can select the time agents have to fill out and save the activity form after the interaction with the customer ends. After this time runs out, the Inactive pause will automatically start. Additionally, you can select a recording that will be played back to the customer after they join the Queue and choose the music or speech that will be played back to the caller while they are waiting in the Queue. This is the maximum time the customer can remain in the queue before being sent to the next target. You can also set the queue's Priority for distribution of Activities to Agents who are logged in to several Queues. Be careful here! "0" is the highest priority while "10" is the lowest priority. Below, you have the possibility to define conditions under which a caller can't enter the Queue as well as conditions under which the caller will be removed from the Queue.

Additionally, you can select if you want the caller to be connected to a specific agent - the Agent they spoke to last time, the owner of the CRM Contact if available or the owner of the CRM Contact exclusively. Agents that reject or do not answer an Activity can be automatically put on an Inactive pause. Below, you can select how long the Agent has to answer the call, after which the Call will be routed to the next Agent. Wrap-up time is a break between the next Activity is routed to an Agent in this Queue, providing them with a bit of breathing space between Calls. You can also opt to call Agents who are already busy with another Call, select the activity distribution strategy, allow Users to set multiple Statuses for Activities using this Queue, automatically open the tab with the activity for the Agent handling it, activate missed activity notifications and select the amount of time after which the Agent should receive a notification if they are in another tab while there is no Agent interaction in an open activity.

Periodic Announcement

The next section lets you utilise an IVR to configure a Periodic Announcement played back for the caller when no Agents are available. Decide if the Announcement should repeat and how often, check this box to jump to selected IVR immediately after joining queue and check this one to let the caller know how many people are ahead of them in the Queue - this option also has its own repeat settings. The last field allows you to select the Periodic Announcement's language.

Monitoring

By checking the following two boxes, you can inform your Agent about active call monitoring by displaying an icon in the call activity or playing an audio notification - using two different recordings for the start and stop of call monitoring.

Recordings

The following section allows you to automatically record Calls, specifying what exactly to record. You can also allow your Agents to start and stop the recording. Here, you can select how many days to keep recordings of calls made using this queue.

Forms

In the next section, you can choose to use a campaign record form in this Queue, allow agents to manually pick and call any campaign records that meet the relevant conditions, allow agents to skip loaded campaign records and choose the campaigns you want to connect with this Queue. Below, you can select where the call will be routed if it is not answered and when an answered call is ended by the agent.

Tickets

This field allows you to pick a category that will automatically be assigned to tickets created in activities using this queue. Speech to Text and AI Topics and QA Reviews The remaining sections let you enable Speech to Text, as well as AI Topics and QA Reviews. Once you're done configuring your new Calls Inbound Queue, click Save.

Call Steering

Using call steering, customers can simply say which person or department they want to speak with and the application connects them. Let's go to Routings -> Calls -> Call Steering and create a new item. The Title will be necessary. For a detailed description of the different Call steering Application types, consult our online Documentation. You'll also need to select the language of the customer's speech. Next, select the type of listening mode. After beep means starting recording customer speech after welcome audio and beep. Real time means starting recording customer speech during the welcome audio already. Careful! Silence and speech duration must be set accordingly. Another key setting is the Similarity limit, where you pick a minimal value of percentage similarity between transcript and description hint word. If there is no matches more than that limit, then call is routed according to next application settings. Finally, you can select the next destination for this Call Steering.

Calls outbound queue

Now that you're familiar with Calls Inbound Queues that allow you to deal with incoming Calls, let's add a new Calls Outbound Queue, which will enable your Agents to make outgoing Calls. Despite the difference in functionality, however, you will notice that you're already familiar with all of the settings at your disposal. Once you're done setting up your new Calls Outbound Queue, click Save.

External devices

An External Number, as the name itself suggest, is an external number like a mobile phone, that we can assign to a specific User. Incoming calls to this User can then ring on this external device. Let's go to Manage -> Devices -> External Numbers to add a new one. The setup is quite easy, only requiring a Title and the number itself. You can check this box to make this device available for agents to select dynamically from the navbar. If you uncheck it, it will only be possible to assign the device from Manage – Users – List of Users.

Section 6: **Active Call Centre**

Key skills:

- Call Scripts
- Manual Campaign
- Progressive Campaign
- Predictive Campaign

Glossary:

Active Call Centre

An Active Call Centre deals mostly with outgoing activities. For example, an instance dedicated to cold calling campaigns aiming at acquiring new customers.

Records

Records allow you to work with your scheduled calls for manual, progressive and predictive campaigns as well as click-to-call.

Manual Campaign

A Manual Campaign dials calls manually after the Agent's interaction.

Progressive Campaign

With Progressive dialling, Daktela will display a customer contact form for a pre-defined period of time, allowing the agent to check it. Once this time runs out, the system dials the contact. In case of no answer, the system closes the call and retrieves another form. In case of a successful call, the agent then simply completes and closes the call.

Predictive Campaign

Daktela predictive dialler is an outbound call processing system designed to maintain a high level of utilisation and cost efficiency in the contact centre. The dialler automatically calls a list of telephone numbers, filters out unnecessary calls such as answering machines and busy signals and connects an available agent with the customer.

An Active Call Centre, as opposed to a Passive Call Centre, is one that deals mostly with outgoing activities. For example, an instance dedicated to cold calling campaigns aiming at acquiring new customers.

Records

Records allow you to work with your scheduled calls for manual, progressive and predictive campaigns as well as click-to-call. Let's get started by going to Manage -> Call Scripts. With this module, we can set up a form that opens up for an agent to see during an outgoing call activity. First, create a new Call Script. You can give it a Description, select the primary queue the record type will be associated with and select which tab will be autofocused when you open the record. Click Save. Now you can change the Form your Agent will see before their Call by clicking Change in the Form column. You'll be welcomed with a familiar drag and drop interface, allowing you to use Blocks to organise various Fields that will be used in this form. You can add a new Field here, providing it with basic information, Type and Format.

Queues (campaigns)

Let's go to Manage -> Queues again. An Active Call Centre will utilise one of three special types of Queues: Manual Campaign, Progressive Campaign and a Predictive Campaign. Let's go through the process of configuring them one by one.

Manual campaign

A Manual Campaign dials calls manually after the Agent's interaction. Let's create a new Manual Campaign. A Title and a Unique queue number will be necessary, but the latter one will be suggested to you automatically. The Queue type will also be pre-filled for you. Advanced settings provide you with interesting customisation options, like specifying how much time the Agent has to read and save a Form and the amount of time after which the Inactive pause will automatically be set if an Agent logged into this Queue has no open activities. Below, you can find Monitoring settings that let you provide your Agent with visual and audio notifications.

You will also need to decide if and how to save your activity Recordings. By default, no calls are recorded, but you can pick to start the recording from the very start, as soon as the Call is bridged or after the caller has been connected to an Agent. In the Forms section you can, for instance, require a login for loading Records in this Campaign, allow Users to reschedule Campaign Records to another Agent or select the type of sorting logic used to choose the next Campaign Record. You can also choose where the Call will be routed after an answered call is ended by the Agent and pick a category that will automatically be assigned to Tickets created in Activities using this queue. You can also transcribe calls made in this queue using speech-to-text.

Progressive campaign

With Progressive dialling, Daktela will display a customer contact form for a pre-defined period of time, allowing the agent to check it. Once this time runs out, the system dials the contact. In case of no answer, the system closes the call and retrieves another form. In case of a successful call, the agent then simply completes and closes the call.

Let's create a new Progressive Campaign. Most options here will be identical to the Manual Campaign, with a few changes. Since Calls are made without the Agent's input, it will be necessary to select proper Working hours. Dialler settings is a new section here. You can select how long the Dialer should wait for the customer to answer a Call, specify the number of allowed unsuccessful attempts to dial a Record, decide on the delay between attempts, length of pauses after both answered and unanswered Calls and finally, select the Status that should be assigned to the campaign record if the called party is busy, unavailable within the max time allowed or completely unreachable.

Predictive campaign

Daktela predictive dialler is an outbound call processing system designed to maintain a high level of utilisation and cost efficiency in the contact centre. The dialler automatically calls a list of telephone numbers, filters out unnecessary calls such as answering machines and busy signals and connects an available agent with the customer.

While creating a new Predictive Campaign, you'll notice that you're already familiar with all of the settings. Let's move on to further options to configure your call centre.

Blacklists

Blacklists allow you to prevent your Contact Centre from making or receiving calls and from receiving SMSes from certain numbers. When you're creating a campaign and importing contacts into it, numbers contained in the blacklist will automatically be omitted. Incoming calls and SMSes from a blocked number will not reach agents and outgoing calls to a blocked number will be terminated.

Let's go to Manage -> Settings -> Blacklist for a list of all your blacklisted numbers along with basic info on each of them - like the Description, the Database and User they belong to, when they were created and when they expired. Let's create a new Blacklist number by clicking here. The number itself will be, of course, necessary. The description is, as always, optional.

A Blacklist Database is simply a group of blacklist numbers that can be created in queue's relations. Finally, you can assign the Number to a User and set an Expiration date and time. If you need to create a new Blacklist Database, go to Manage -> Queues, click Blacklist in the relevant Queue's Relations column, click Add New, give it a Title, Unique Name and Description and you're ready to start assigning Blacklist Numbers to it.

Statuses

Statuses can be used for your Blacklists as well! Go to Manage -> Settings -> Statuses and start creating a new Status. You can pick a relevant Blacklist Database here and specify its expiration date in this field. The tooltip will help you with formatting and the field on the right will display the final result.

Agent greetings

Agent Greetings are used in Call Activities to save time on phrases often said at the beginning of a conversation, such as introductions or GDPR consent. Let's go to Manage-> Settings -> Agent greetings for a list of all the Agent Greetings you can work with. You can see their Titles and Descriptions, assigned Users and Queues as well as each item's Code. For each item, you can upload or play a Recording as well as perform basic operations.