## Contacts-

# Create Contact List

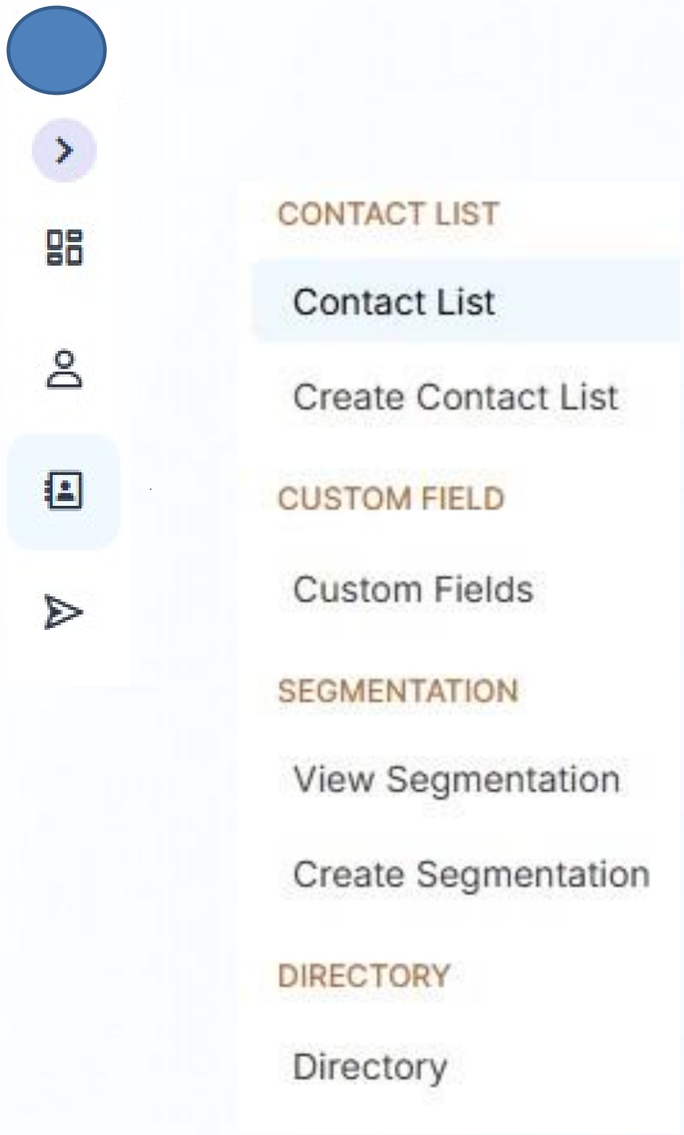
Hashmi infonet User Guide

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# Hashmi Contacts- Contact List

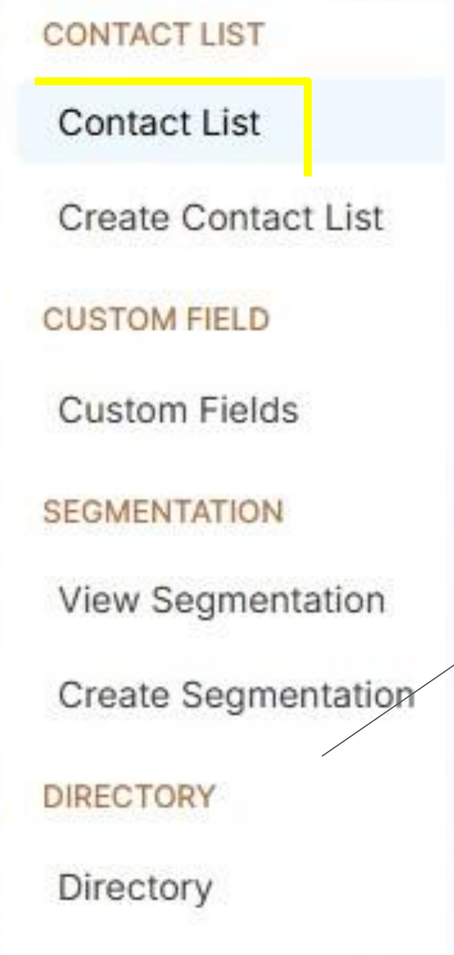



Go to Contacts icon from the left-hand menu. This section is used to view and manage all contact lists created within the system.

**Definition**

- The Contact List is a container that holds customer or lead data used for calling, campaigns, and segmentation
- Each list maintains its own subscribers, custom fields, and configuration settings to ensure structured and compliant data usage

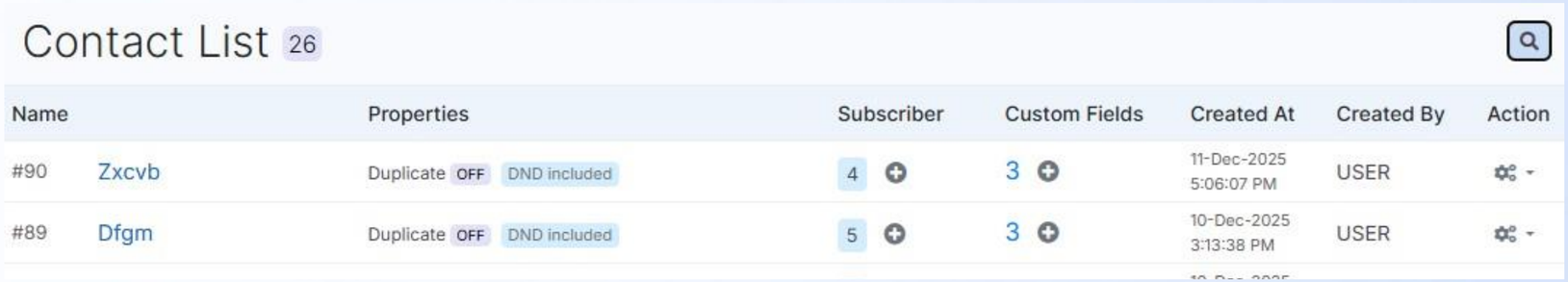
# Hashmi Contacts- Contact List



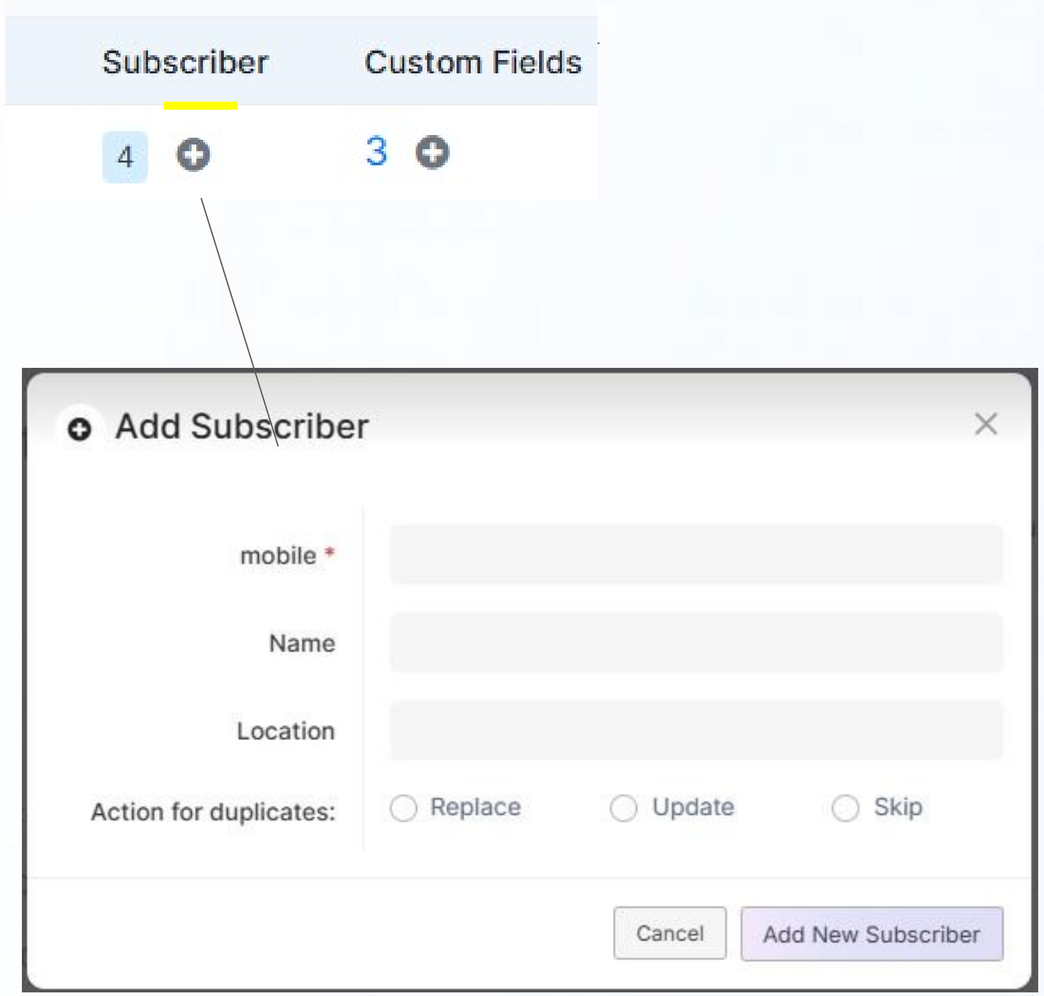

The Contact List section is used to create, manage, and organize customer contact data that will be used for calling, campaigns, and segmentation. Each contact list acts as a container for subscribers along with their associated custom fields, helping teams maintain clean, structured, and usable data.

## Key Elements

- Name : Displays the name of the contact list for easy identification.
- Properties : Shows list-level rules such as duplicate handling and DND inclusion, helping ensure compliance and data hygiene.
- Subscriber : Indicates the total number of subscribers present in the contact list. The “+” icon allows quick addition of new subscribers to that list.
- Custom Fields : Shows the count of custom fields linked to the contact list. The “+” icon is used to manage or update custom fields for the list.
- Created At / Created By : Helps track when the list was created and by whom, useful for audits and ownership clarity.
- Action: Contains list-level actions.



# Hashmi Contacts- Contact List



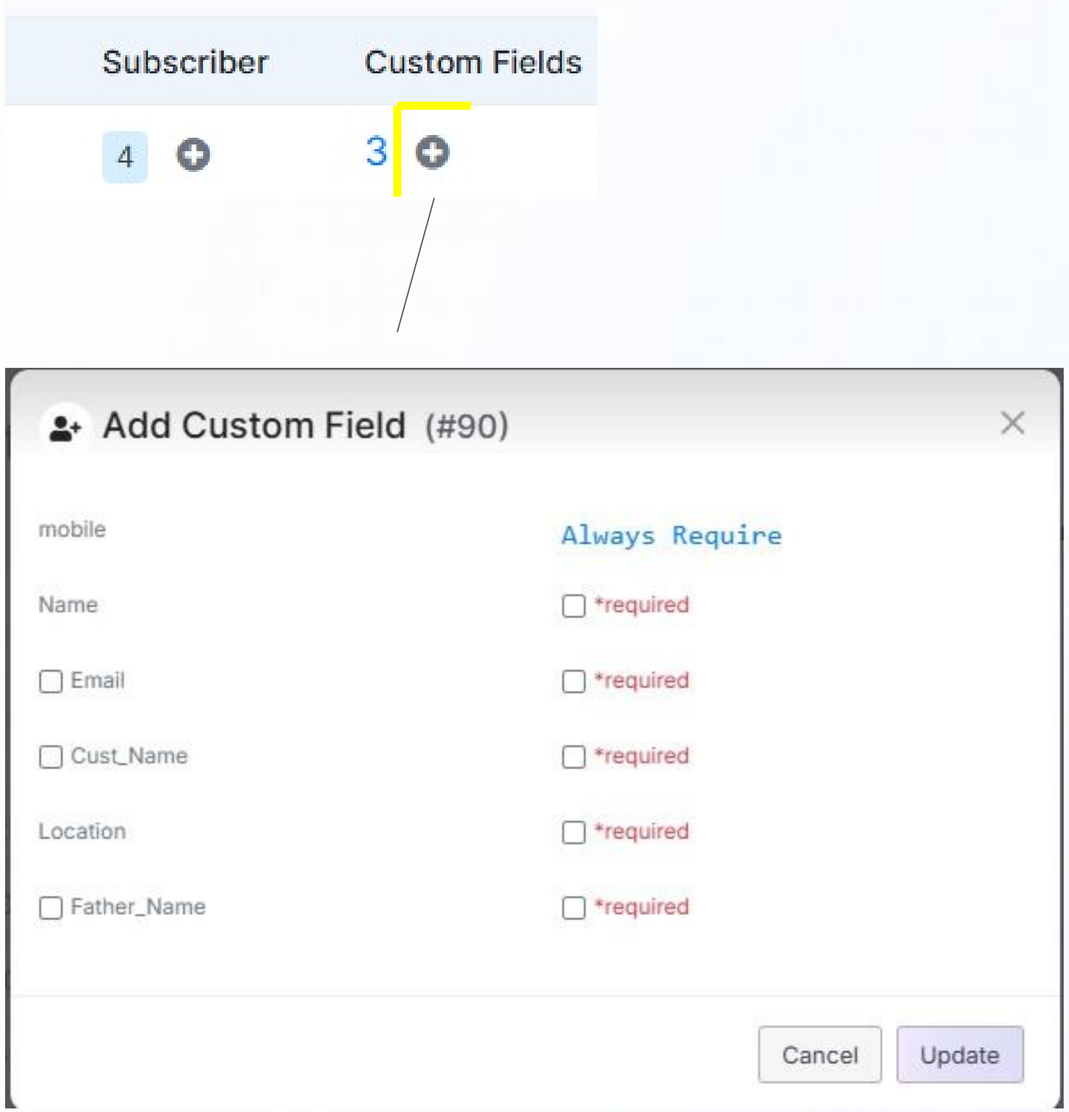

**Add Subscriber (via “+” icon)**

The Add Subscriber option allows users to manually add individual contacts to a selected contact list.

What You Can Do Here

- Mobile (Mandatory): Primary identifier for the subscriber and required for calling operations.
- Name & Location: Optional fields to store basic subscriber information.
- Action for Duplicates : Defines how the system should behave if the mobile number already exists:
- Replace – Overwrites existing subscriber data
- Update – Updates only new values
- Skip – Ignores the duplicate entryThis ensures controlled handling of duplicate records and maintains data accuracy.

# Hashmi Contacts- Contact List




### Custom Fields (via “+” icon)

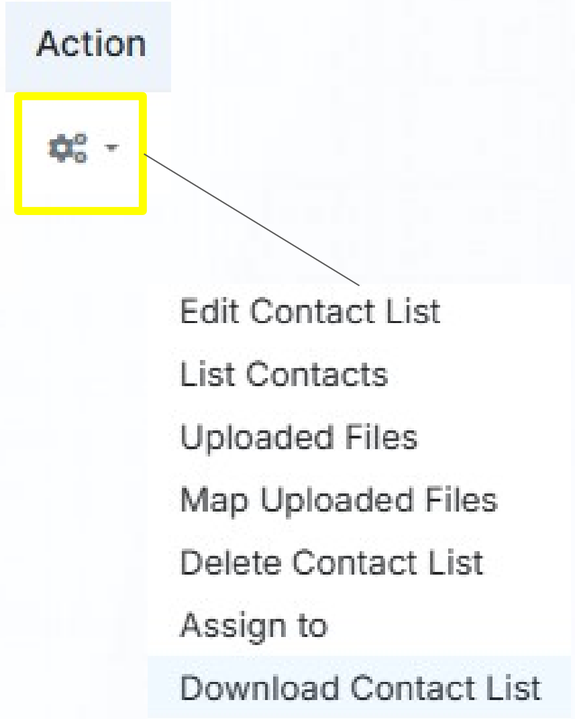
Custom Fields allow you to capture additional subscriber information beyond basic details, enabling better segmentation and personalization.

### Key Capabilities

- Field Selection : Choose from available fields such as Email, Customer Name, Location, Father’s Name, etc.
- Required Field Control : Mark fields as mandatory to ensure critical data is always captured.
- Always Require (Mobile) : The mobile number remains compulsory, ensuring each subscriber is uniquely identifiable.

Custom fields make the contact list flexible and adaptable to different business needs without changing the core structure.

# Hashmi Contacts- Contact List




Search Contact List
The Search option helps quickly locate specific contact lists when managing a large dataset.

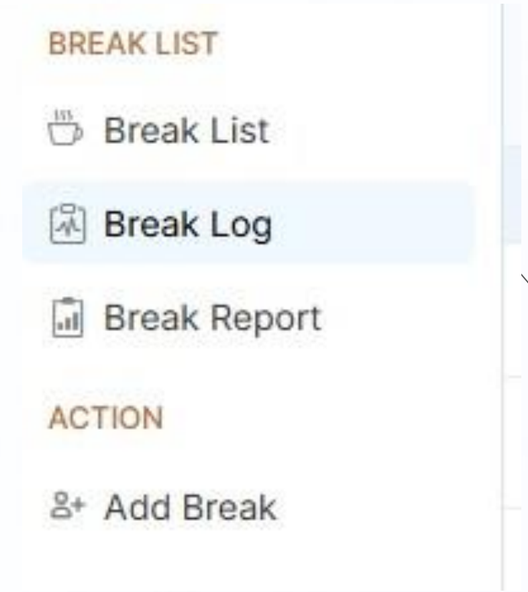
Search Filters Available :

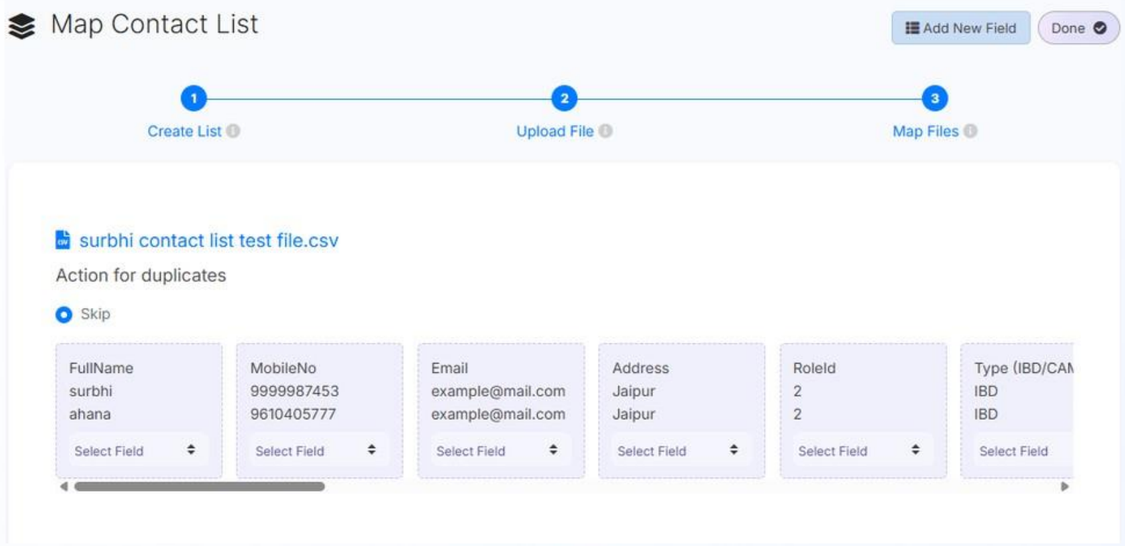
- Contact List ID : Find a list using its unique identifier.
- Status : Filter lists based on their current state.
- Date Range : Narrow results based on list creation period. This improves navigation efficiency and reduces time spent locating lists.

Why Contact Lists Matter

- Acts as the foundation for calling and campaign execution
- Enables clean data management with duplicate and DND controls
- Supports custom data capture through configurable fields
- Makes segmentation and targeting more effective

# Hashmi Break List: Break Log



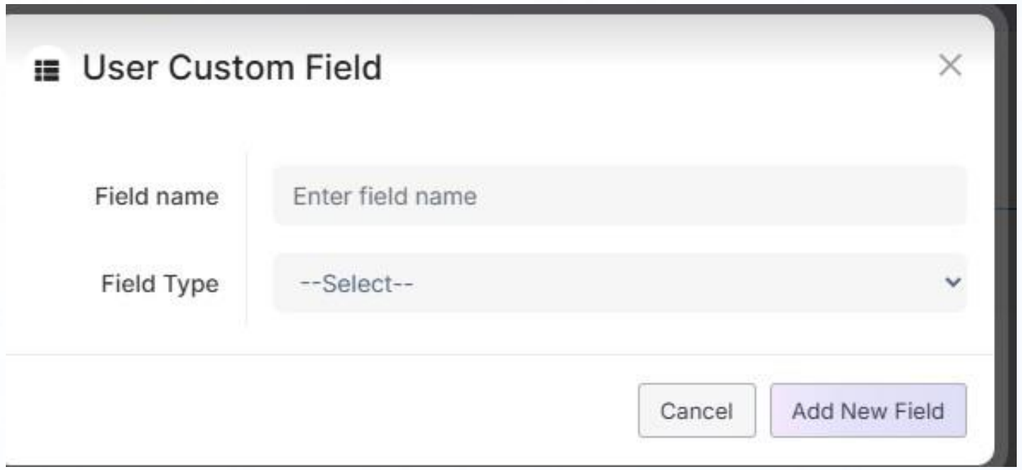

**Break Log**

The Break Log provides a detailed, time-based record of all breaks taken by agents.

**Key Elements:**:

- **Employee -** Agent who took the break.
- **Break Title & Type -** Type of break used.
- **Start Time & End Time -** Exact timestamps of the break.
- **Duration -** Total time spent on the break.
- **End Break Strategy -** How the break was ended (Manual or Automatic )

# Hashmi Break List : Break Report



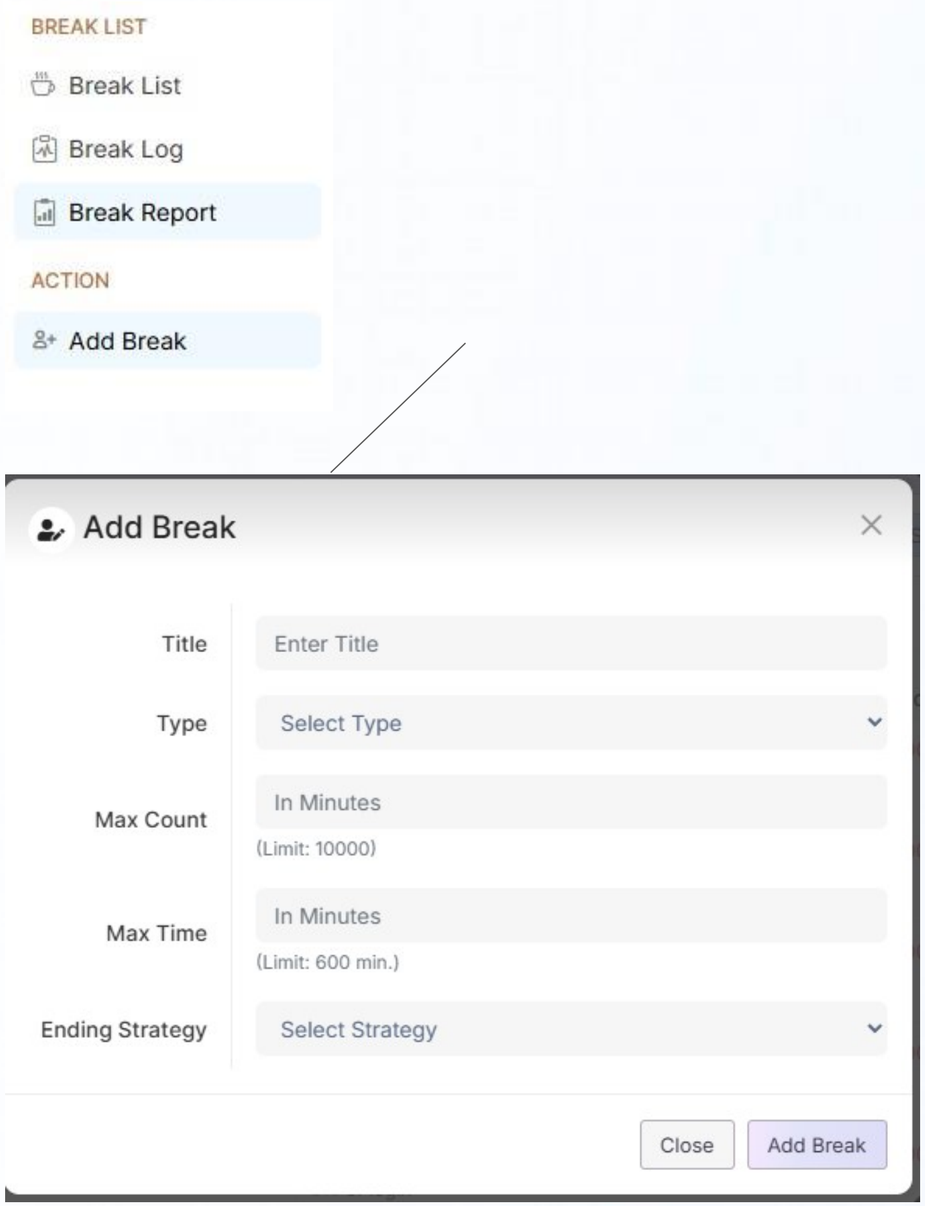

**Break Report**

The Break Report offers a summarized and analytical view of break usage across agents and groups.

**Key Elements:**

- Viewing break data by Agent or Group
- Applying date range filters
- Selecting custom columns such as: Total Duration, Login Duration, Break Count, Total Exceeded, Lunch, Meeting, Relaxation, Break-wise time (Lunch, Meeting, Relaxation, etc.)
  Reports can be exported to Excel for further analysis and compliance tracking.

# Employee (Break List) : Add Break




This section is used to create a new break type that agents can use during their login hours, with defined limits and ending behavior.

Navigation: Go to Employee- Break-Add Break

**Key Fields:**

- **Title:** Enter a clear name for the break (e.g., Lunch, Meeting, Relaxation). This name will be visible to agents.
- **Type :** Select the break category such as Meal Break, Meeting Break, or Quality Break for classification and reporting.
- **Max Count :** Defines how many times an agent can take this break. This helps control excessive or repeated break usage.
- **Max Time (In Minutes):** Sets the maximum duration allowed for the break. Once the time limit is reached, the break ends based on the selected ending strategy.
- **Ending Strategy :** Determines how the break will stop:
  - **Manual -** Agent must manually end the break
  - **Automatic (Till Working Hours) -** Break ends automatically when working hours end.
  - **Automatic (End of the Day - Midnight) -** Break ends at midnight
  - **When Agent Logout** - Break ends automatically when the agent logs out
- **Action :** Click Add Break to save and activate the break configuration.

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# THANK YOU!

DO YOU HAVE ANY QUESTIONS?

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