Employee-
Group

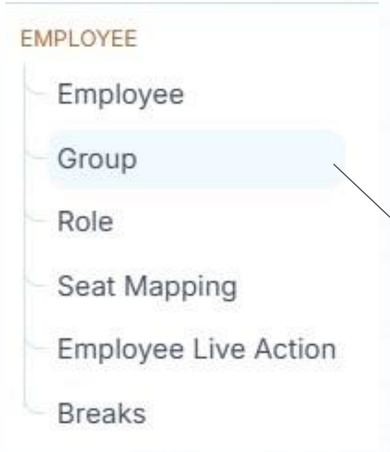
Hashmi infonet User Guide

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Group



A Group represents a set of employees organized together for structured agent management.

The Employee Groups panel displays a list of agent groups along with their associated employees and current status. It helps users manage and review group configurations.

Key Fields:

Group Name - Displays the name of the agent group

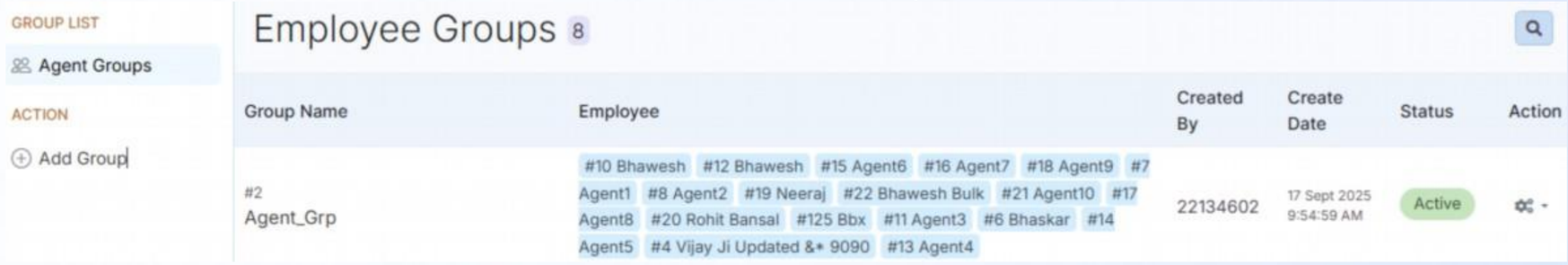
Employee - Lists all employees assigned to the respective group, shown with agent IDs and names.

Created By - Indicates the Admin ID of the user who created the group.

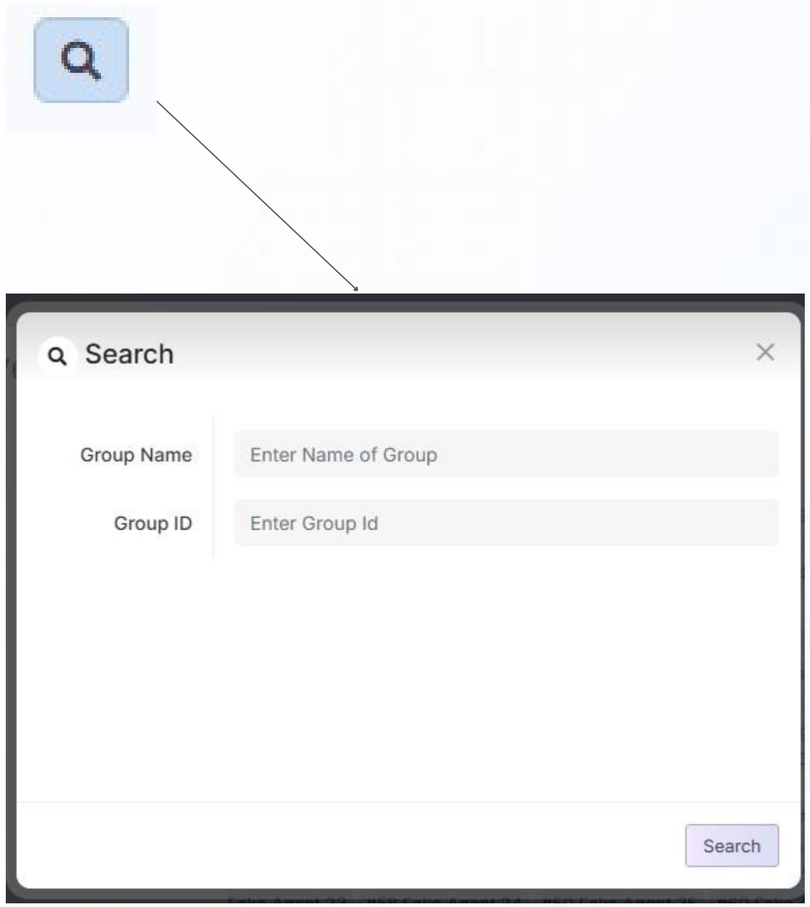
Create Date - Shows the date and time when the group was created.

Status - Displays the current state of the group (e.g., Active, Inactive).

Action - Provides options to manage the group configuration.



Group



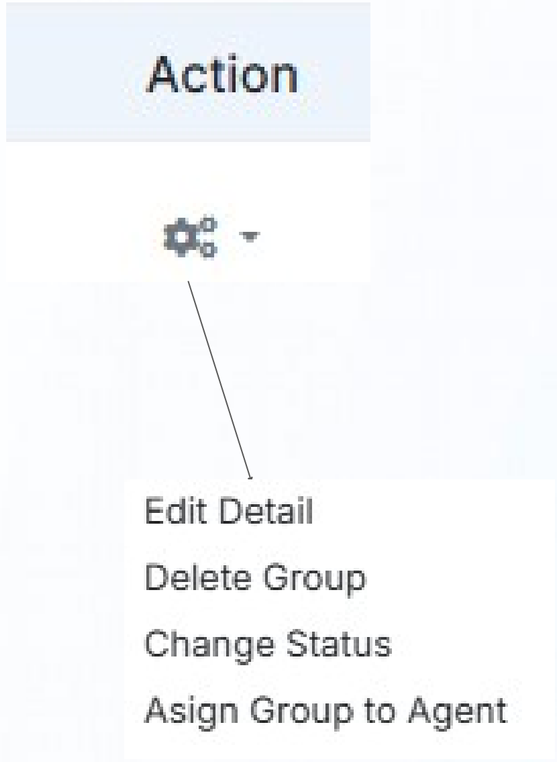
Enables quick lookup of existing roles

Key Elements:

Group Name - Type the existing Group Name to search in the list

Group ID - Type the existing GroupID to search

Group List : Action



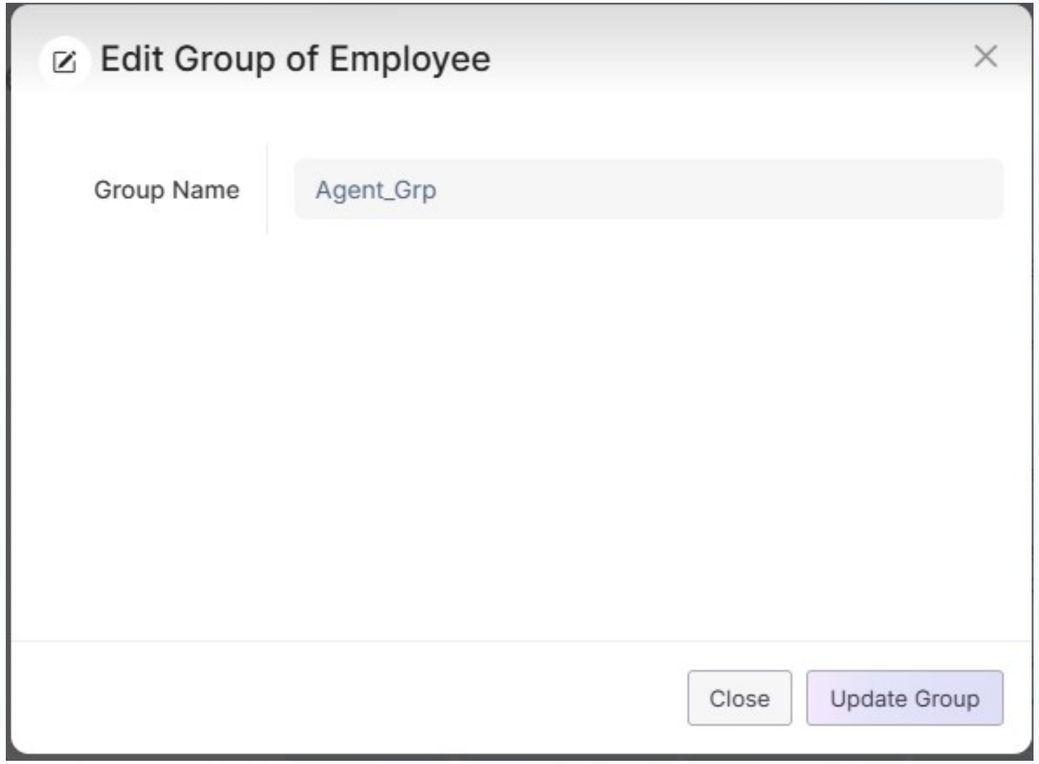
Each Group row includes an Action menu that allows admins to modify Group behavior, Status, and Agent assigning.

Available Actions:

- Edit
- Delete
- Change Status
- Assign Group to Agent

Each action opens in a new window for focused configuration.

Action: Edit Detail



The Edit Group option allows users to update the name of an existing employee group.

Key Elements:

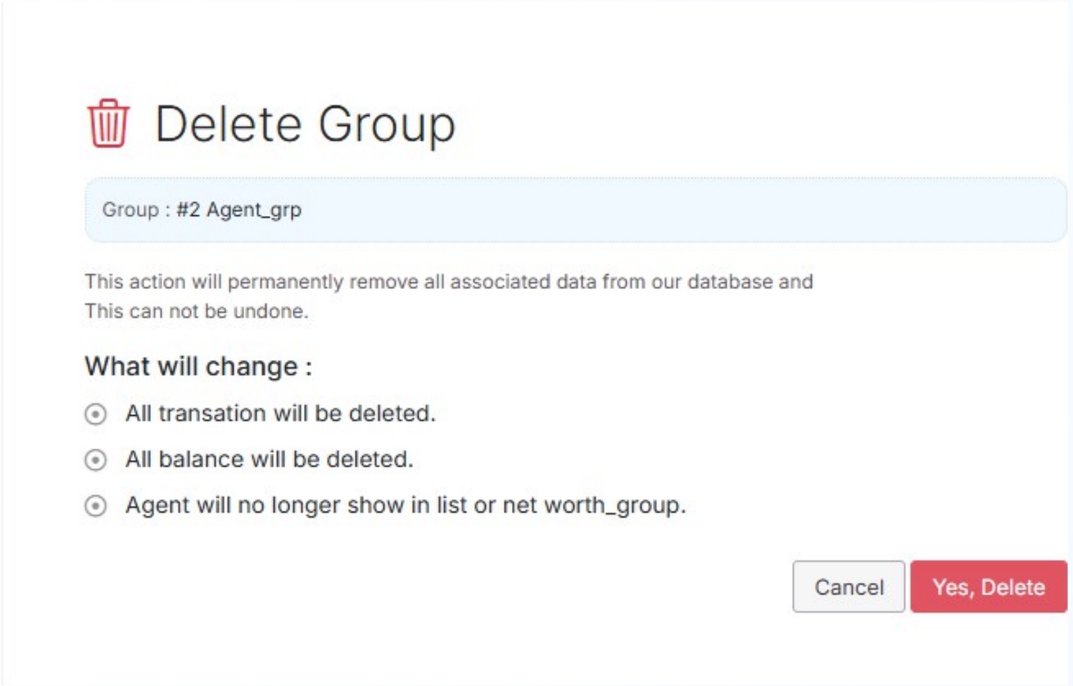
Group Name - Displays the current name of the group, which can be modified.

Actions:

Update Group - Saves the updated group name.

Close - Exits the edit screen without saving changes.

Action: Delete Group



The Delete Group option allows users to permanently remove an employee group from the system.

Key Elements:

Group - Shows the group ID and group name selected for deletion.

What will change:

- All transaction data related to the group will be deleted.
- All balance data related to the group will be deleted.
- Agents in the group will no longer appear in the list or under net worth group.

Actions:

Yes, Delete - Permanently deletes the group.

Cancel - Cancels the delete operation.

Action: Assign to Agent



The Assign Group to Agent option allows users to assign multiple agents to a selected group and manage call-handling permissions.

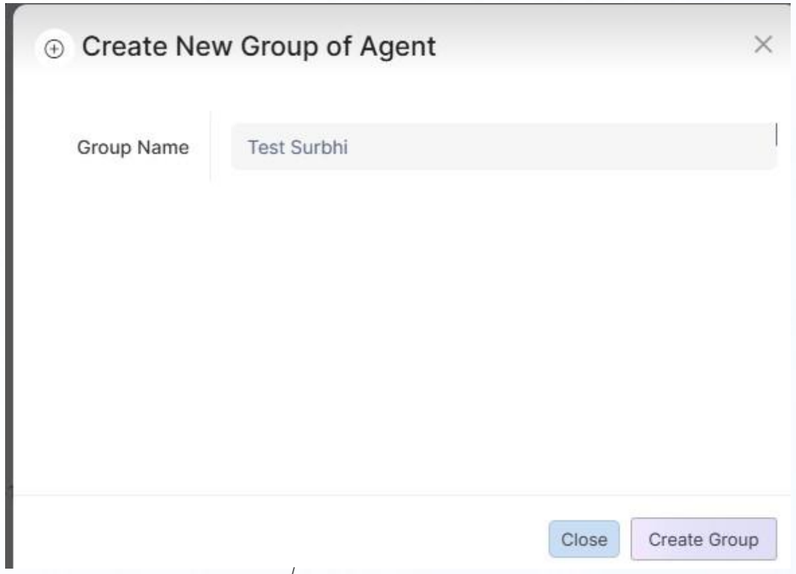
Key Sections:

- **Select Agents to Assign -** Displays a searchable and selectable list of available agents.
- **Assigned Agents -** Shows agents currently selected for the group.
- **Attend Call -** Checkbox to enable call-attending permission for each assigned agent.

Actions:

- Assign or remove agents from the group.
- Enable or disable call attendance per agent.
- Navigate back to the group list.
- Save to make changes otherwise click cancel.

Group: Add Group



The Add Group option allows users to create a new employee group by defining a group name.

Key Elements:

Group Name - Text field to enter the name of the new group.

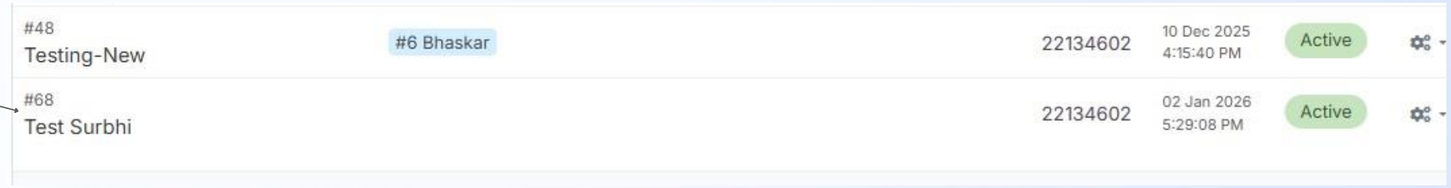
Actions:

Create Group - Creates and saves the new group.

Close - Closes the window without creating a group.

After Clicking Create Group

- The new group is created and saved in the system.
- The created group becomes visible in the Group List with a unique group ID.
- The group appears with its creation date, created by user, and active status.
- From the Action menu, agents can be assigned to the newly created group.
- The group can be further managed using available actions.



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THANK YOU!

DO YOU HAVE ANY QUESTIONS?

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