Contact-

Contact List

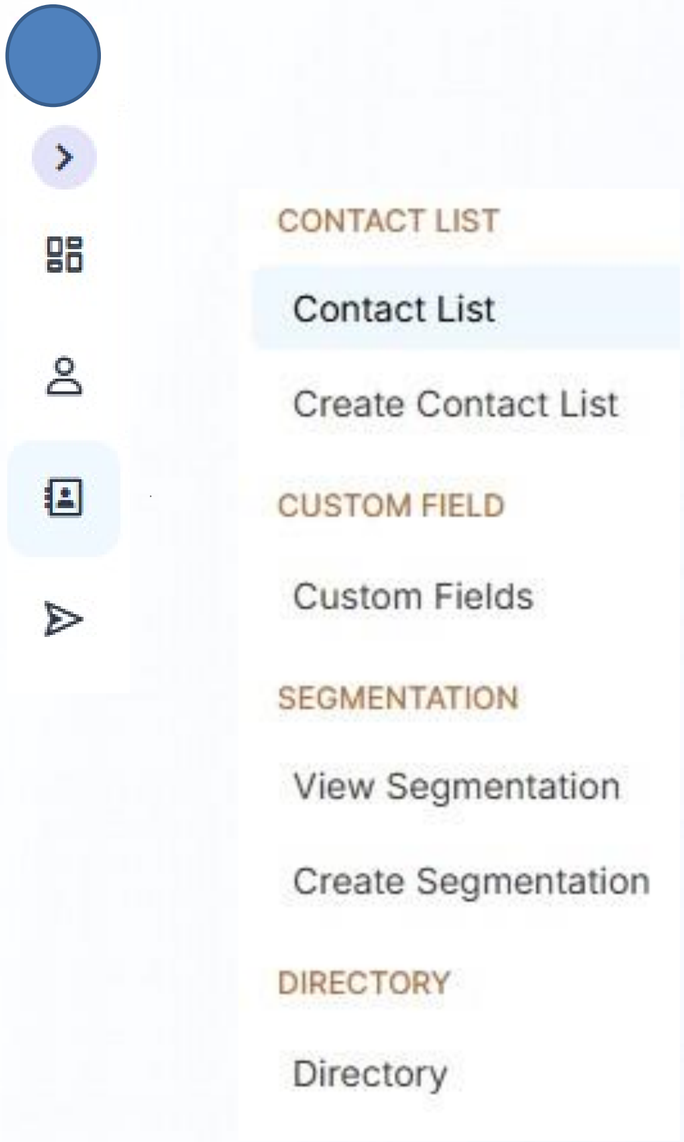
Hashmi infonet User Guide

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Hashmi Contacts- Contact List

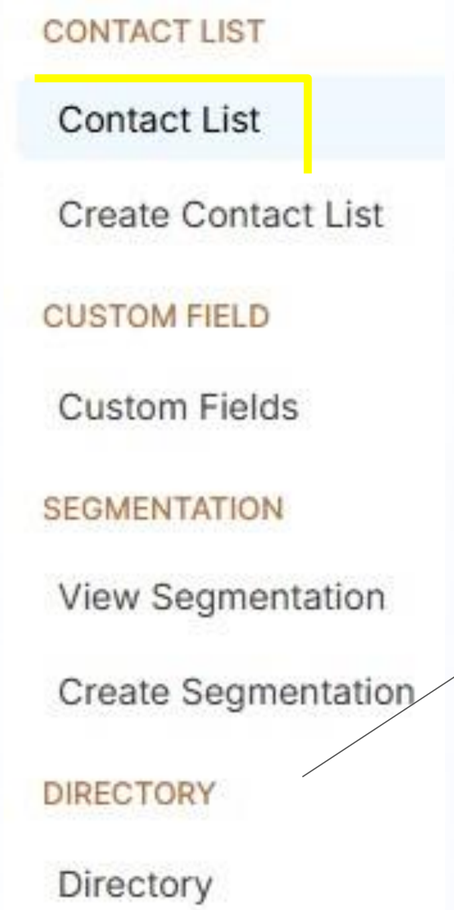


Go to Contacts icon from the left-hand menu. This section is used to view and manage all contact lists created within the system.

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

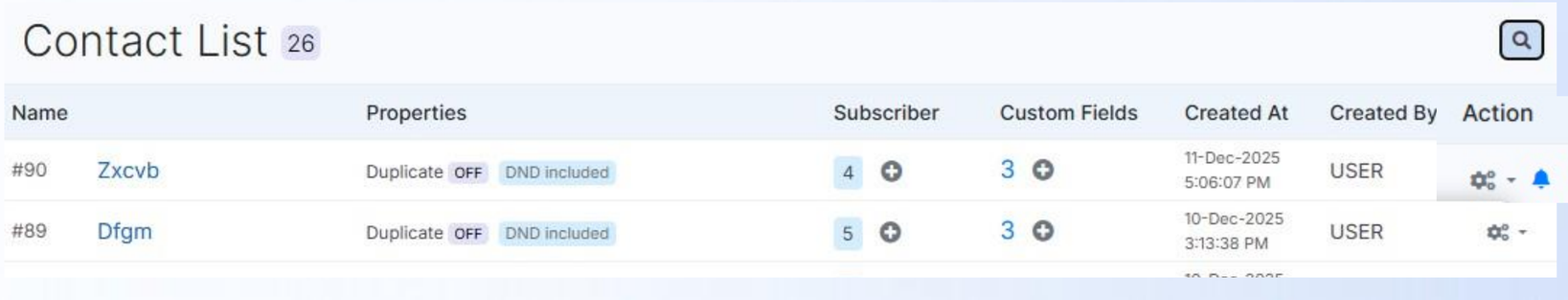
Hashmi Contacts - Contact List



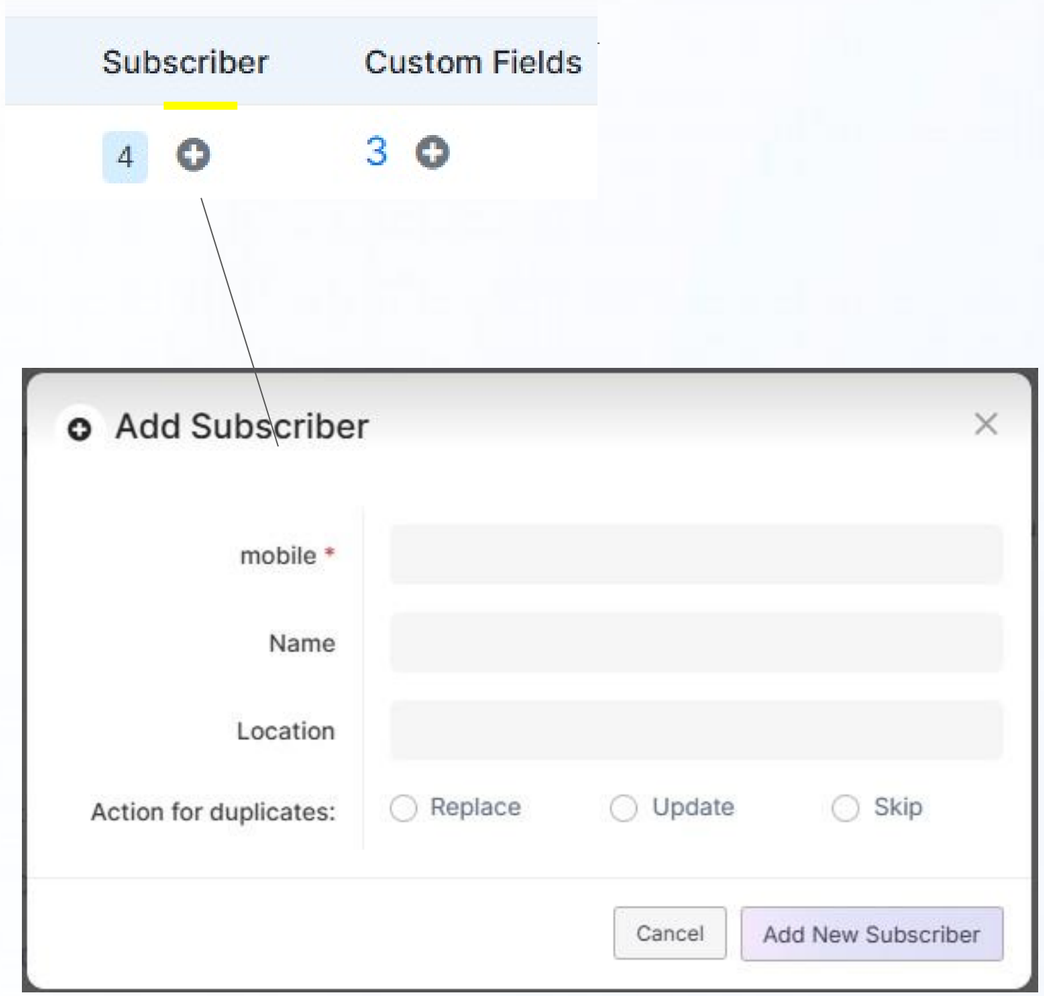
The Contact List section is used to create, manage, and organize customer contact data that will be used for calling, campaigns, and segmentation. Each contact list acts as a container for subscribers along with their associated custom fields, helping teams maintain clean, structured, and usable data.

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.
- Bell Icon: It shows that recent changes have been made in the file.



Hashmi Contacts- Contact List



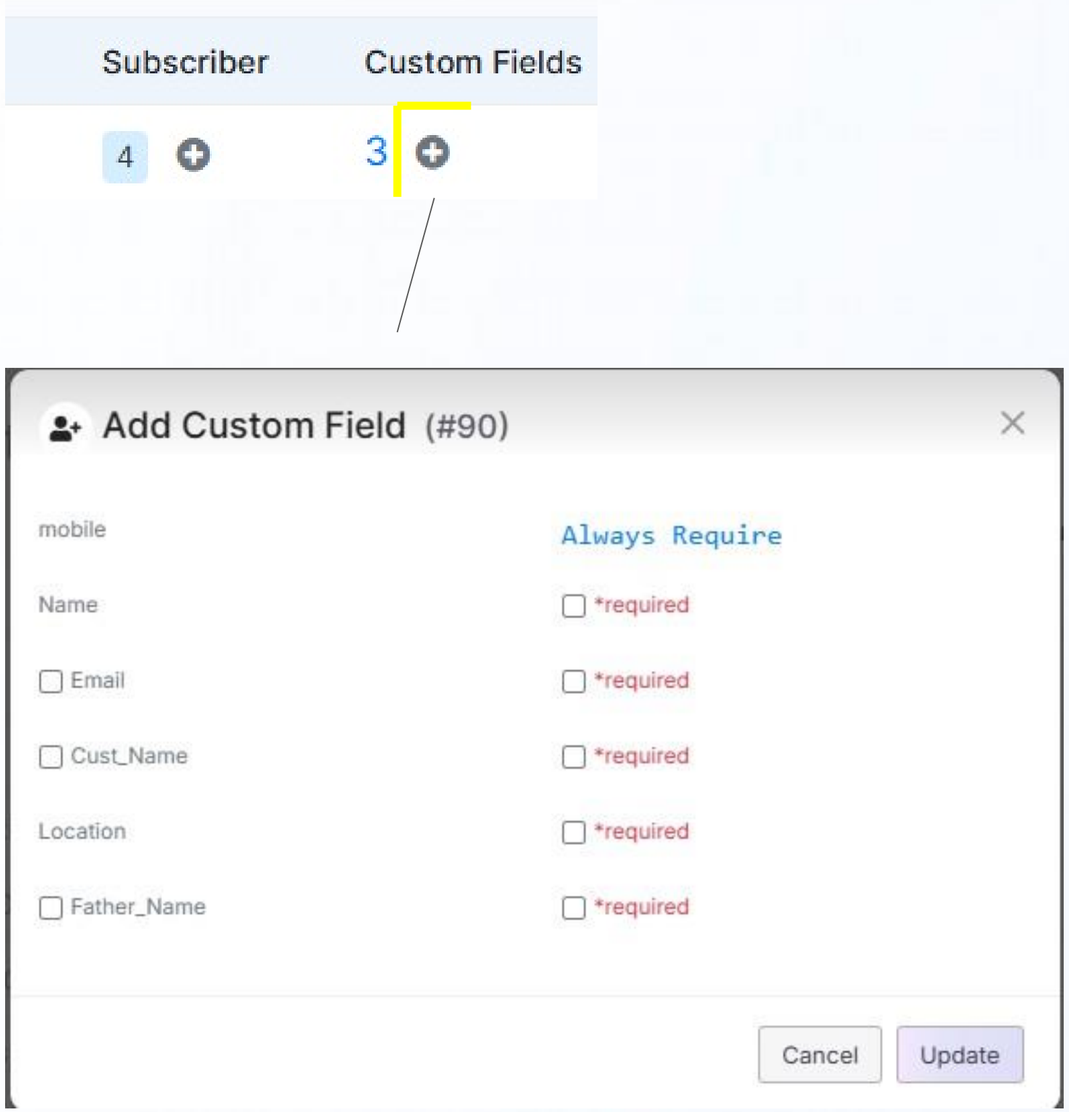
Add Subscriber (via “+” icon)

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)

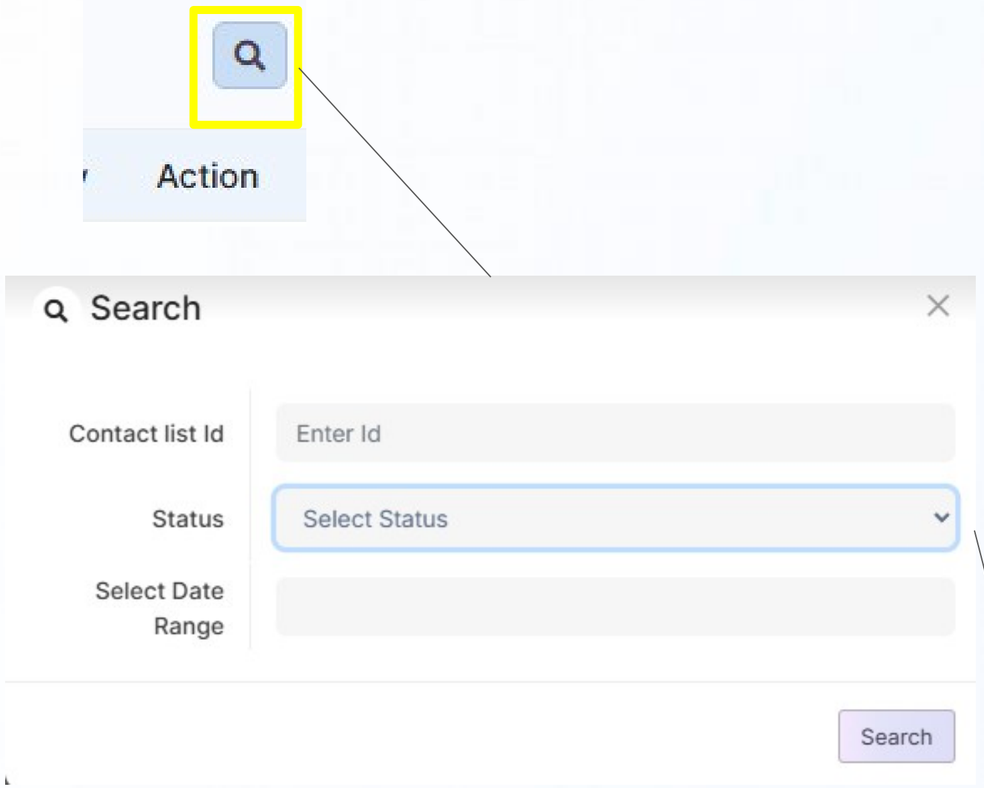
Custom Fields allow you to capture additional subscriber information beyond basic details, enabling better segmentation and personalization.

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.

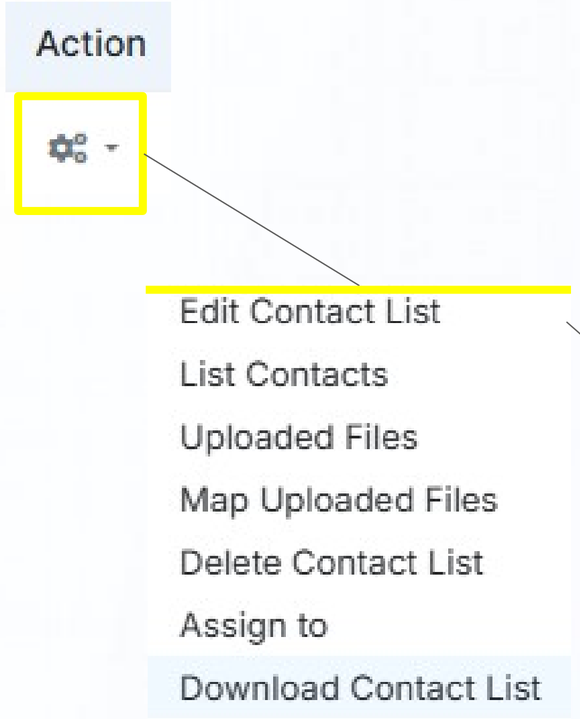
Search Filters Available :

- 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

Contact List (Action) : Edit Contact List



Edit Contact List

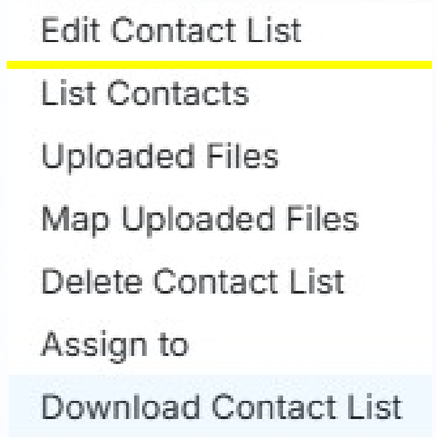
Allows you to rename an existing contact list without affecting the subscribers or mapped data.

Key Points :

- Only the list name can be modified.
- Subscriber data, custom fields, and campaign mappings remain unchanged.
- Useful for correcting names or aligning lists with business use cases.



Contact List (Action) : List Contacts



List Contacts

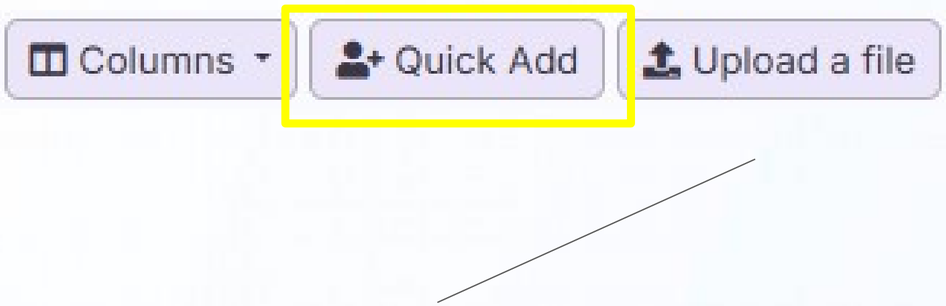
It shows the Contact/Lead List page for the selected contact list and displays all subscribers added to that specific list

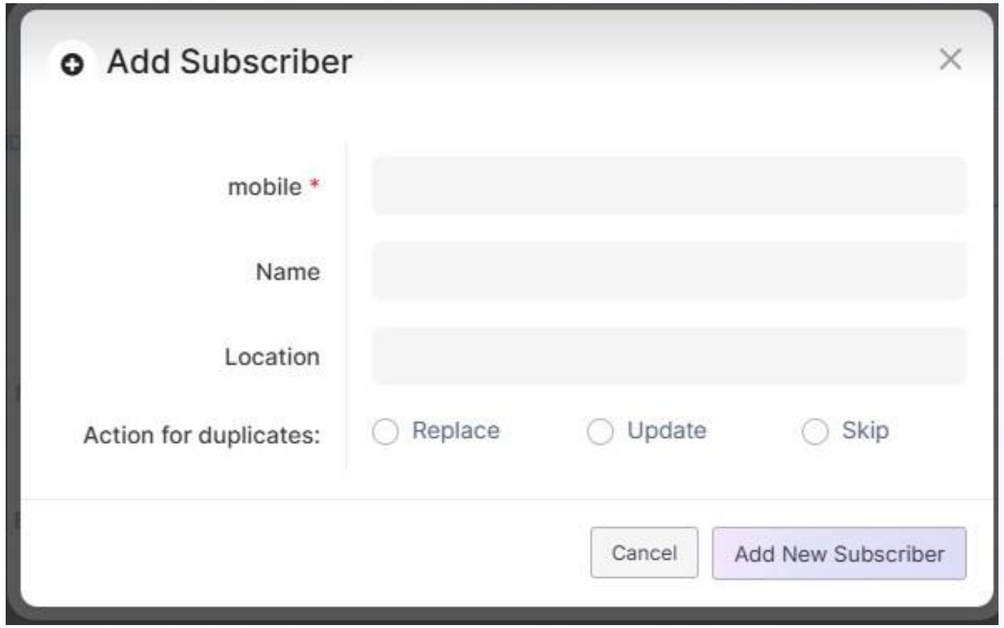
Key Elements

- Subscriber Count: Shows the total number of contacts in the list
- Duplicate & DND Indicators: These show whether the system will handle repeated phone numbers and whether numbers marked as Do Not Disturb (DND) are included or blocked in the contact list.
- Subscriber Details:
  - Mobile number
  - Name
  - Location
  - Last update time
  - OBD Campaign Mapping: Shows if a subscriber is associated with an OBD



Contact List (Action) : List Contacts





Columns Field

Displays and lets you manage visible contact attributes in the list, such as Mobile, Name, Location, and other mapped custom fields.

Quick Add Subscriber (from List Contacts)

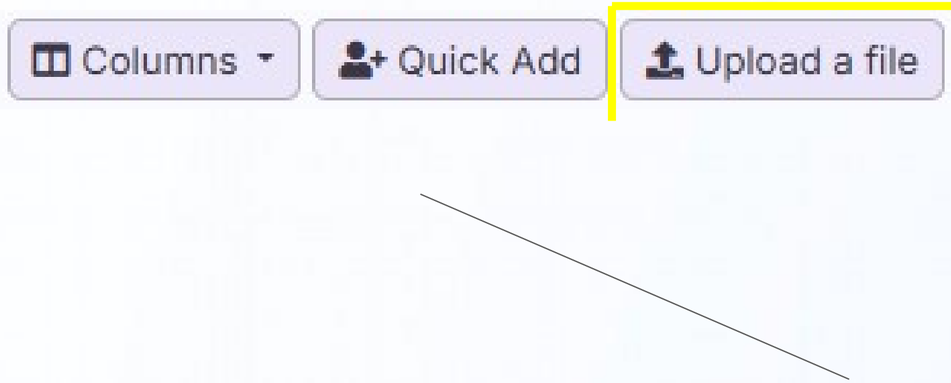
It allows adding a single subscriber instantly to the selected contact list

- Designed for quick manual entry without file uploads

Key Fields

- Mobile (Mandatory): Primary identifier for the subscriber
- Name & Location: Optional fields for better identification
- Action for Duplicates.
  - Replace: Overwrites existing subscriber data
  - Update: Updates only new values
  - Skip: Ignores the entry if the number already exists
- Click Add New Subscriber to save into the list.

Contact List (Action) : List Contacts



Upload a Files

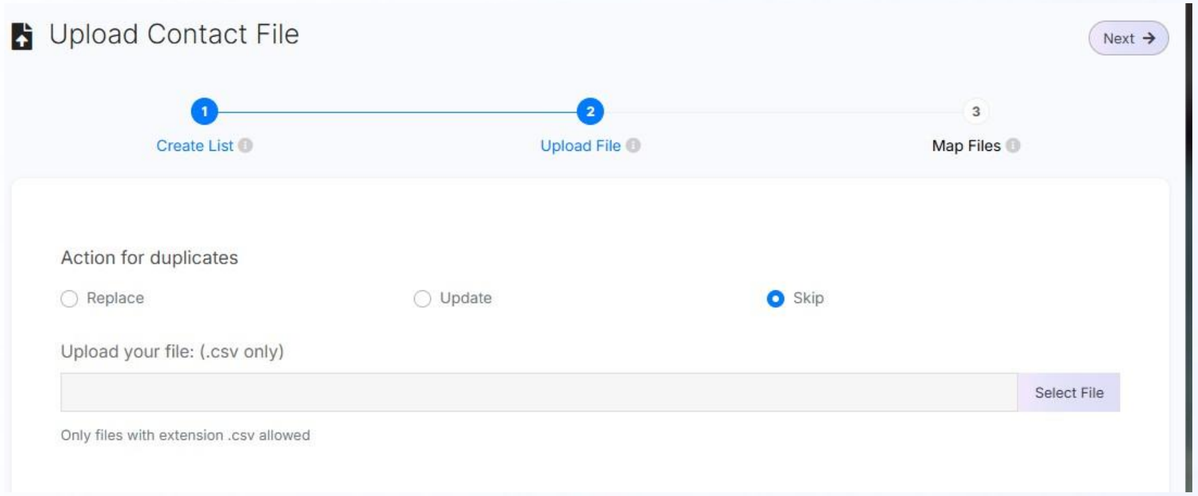
Selecting Upload Files redirects you to Step 2 of the Create Contact List flow.

Key Points

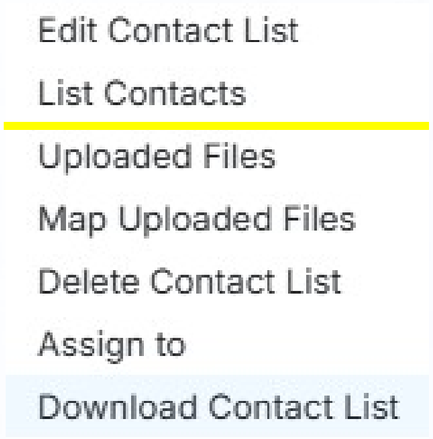
- Allows you to add additional contact list files to an existing contact list
- Supports uploading one or multiple files to expand the same list
- No new contact list is created; data is appended to the selected list
- Mapping : After file upload, the system moves to the Map step, where uploaded file columns are mapped to contact list fields

Note

- The complete upload and mapping flow is explained in detail under the Create Contact List section.



Contact List (Action) : Uploaded Files



Uploaded Files (under Contact List -Action)

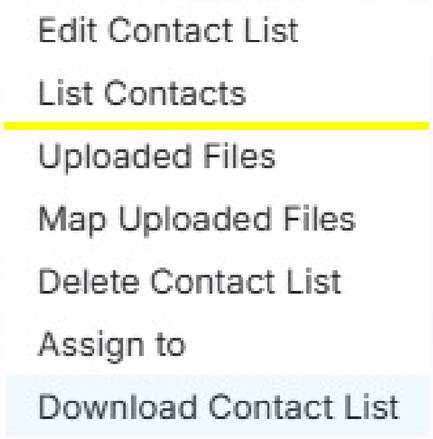
This section shows all files that have been uploaded into the selected contact list and their processing status, helping you clearly track what data was added and how it was handled.

Key Elements:

- **File Name -** Name of the contact file that was uploaded.
- **Status -** Shows whether the file upload is completed or still in progress.
- **Uploaded At -** Date and time when the file was uploaded.
- **Total Records** – Total number of contact rows present in the file.
- **Uploaded Records** – Number of contacts successfully added to the contact list.



Contact List (Action) : Uploaded Files

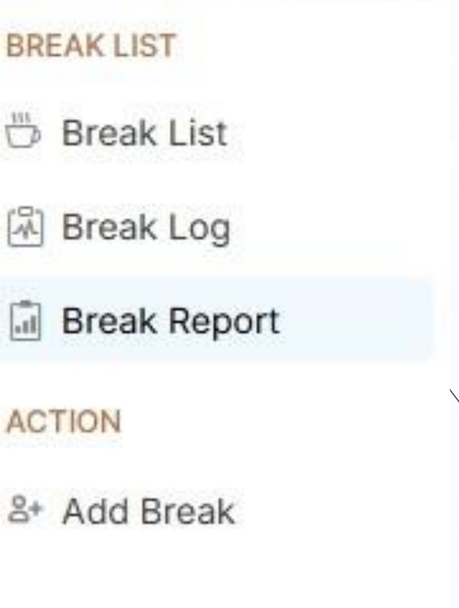


Uploaded Files (Under Contact List - Action)

- **Duplicate** – Number of records skipped because they were already present.
- **Rejected** – Records that failed validation (for example, missing or invalid mobile numbers).
- **Duplicate & DND indicators** – Clearly show if duplicate checking is OFF/ON and whether DND numbers are included.
- **Delete Contact File (Action menu)** – Removes the selected uploaded file and its associated records from the contact list.
- **Actions available :** Quick Add, Search, Upload File – Same as other contact list screens; used to quickly add a contact, find records, or upload more files.



Hashmi Break List : Break Report

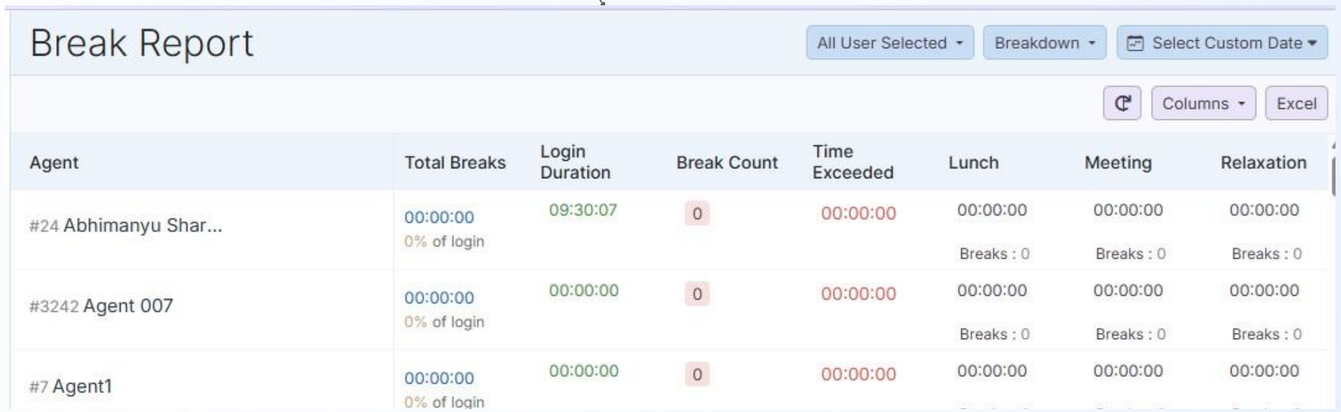


Break Report

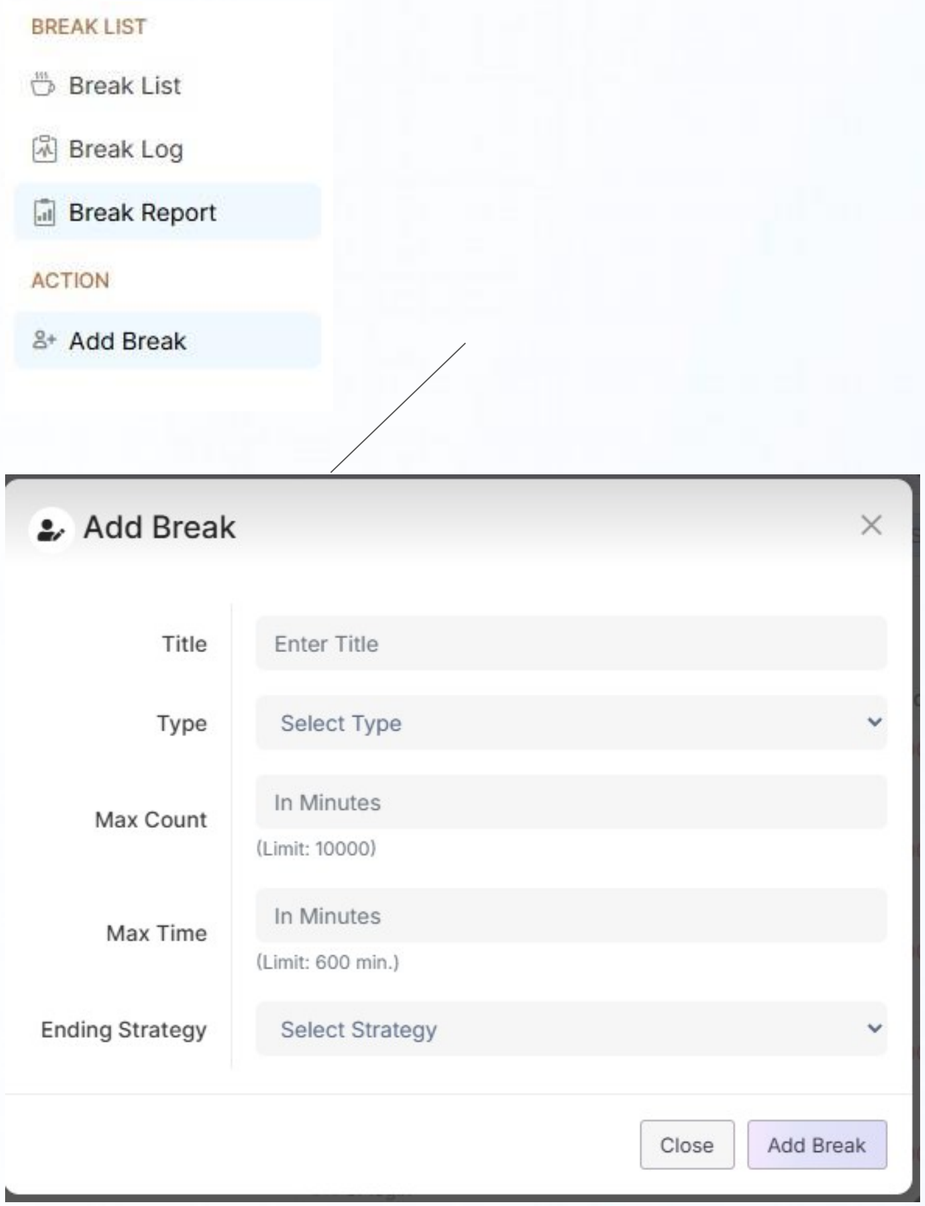
The Break Report offers a summarized and analytical view of break usage across agents and groups.

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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