Employee-

Employee List

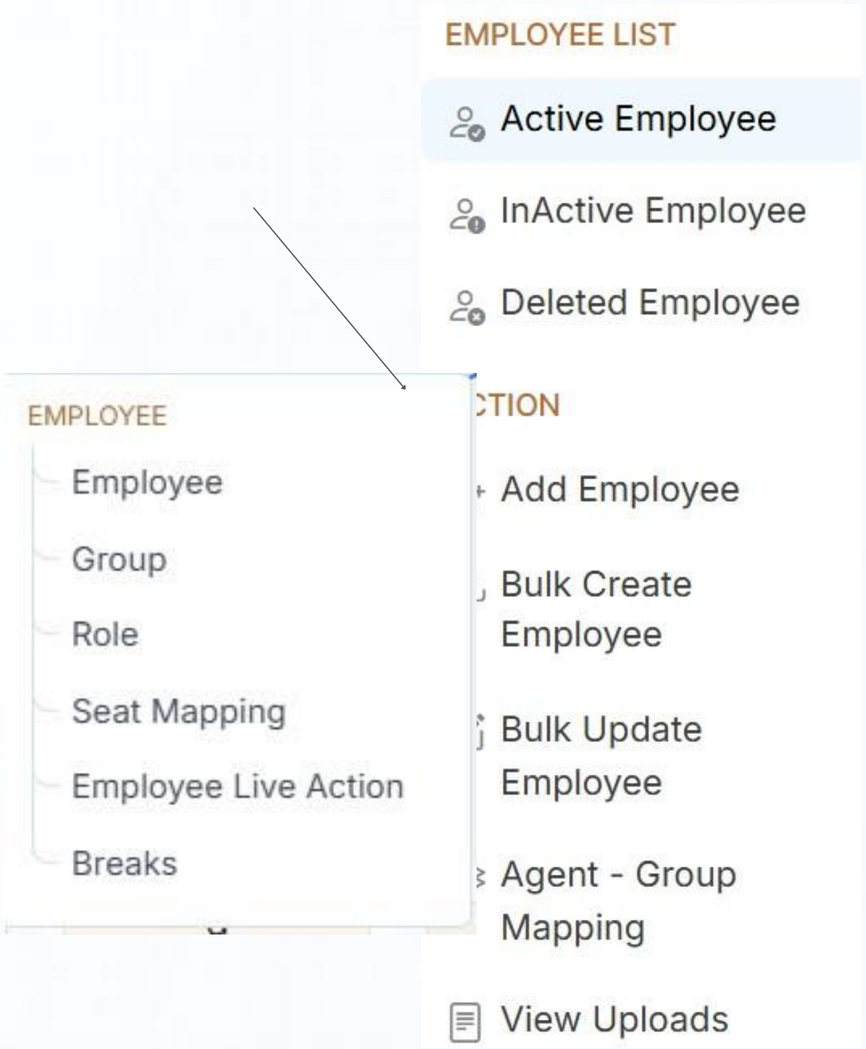
Hashmi infonet User Guide

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Hashmi Employee - Employee



Employee Panel

The Employee panel provides a centralized view of all employees configured in the system. It allows admins to manage employee availability, roles, and call destinations efficiently.

The panel is divided into three tabs:

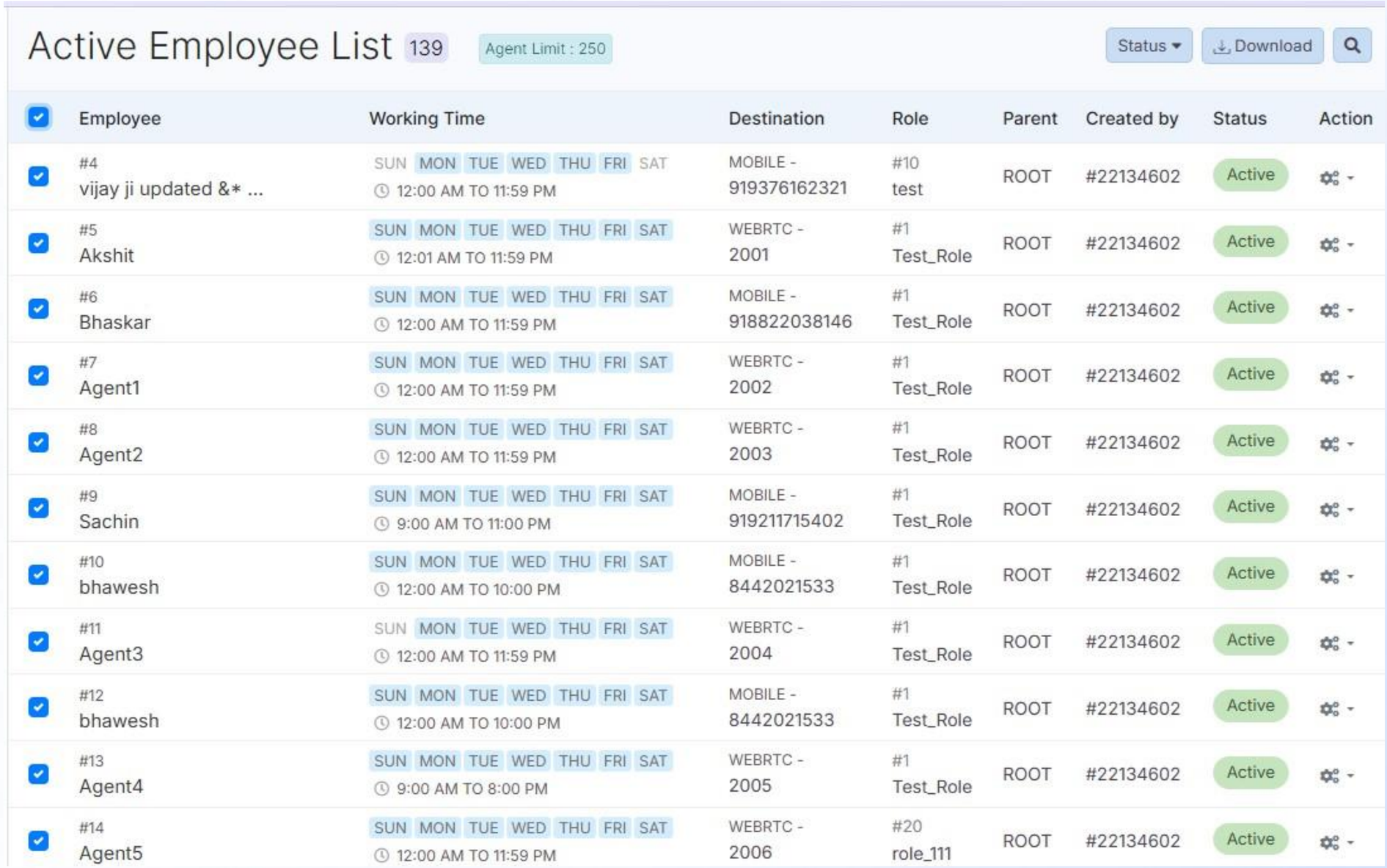
Active Employees - Displays employees who are currently active in the system.

Inactive Employees - Displays employees who are temporarily disabled and not handling calls.

Deleted Employees - Displays employees who have been removed from the system for record and reference purposes.

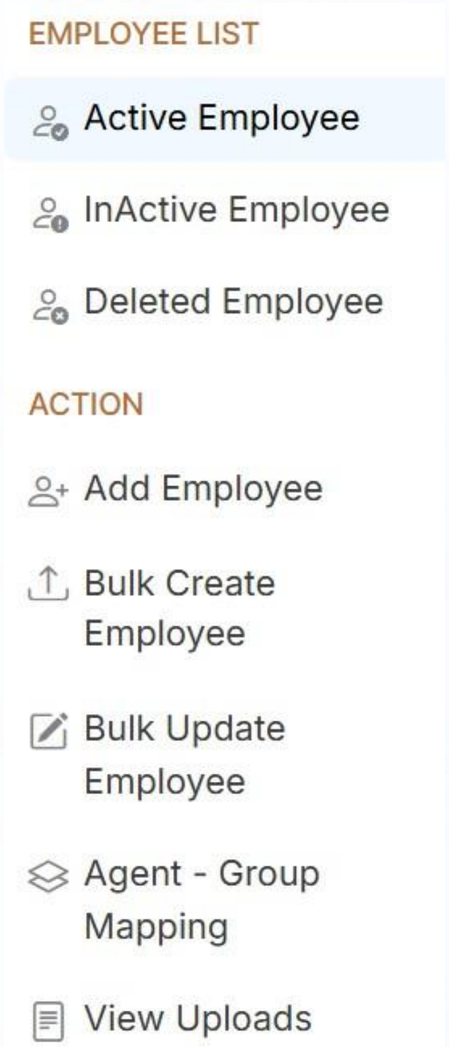
All three tabs follow a similar structure and layout. The details below focus on the Active Employee tab, as the same fields and Key Points apply to the Inactive and Deleted tabs unless stated otherwise.

Employee: Active Employee List



Employee	Working Time	Destination	Role	Parent	Created by	Status	Action
#4 vijay ji updated &* ...	SUN MON TUE WED THU FRI SAT 12:00 AM TO 11:59 PM	MOBILE - 919376162321	#10 test	ROOT	#22134602	Active	
#5 Akshit	SUN MON TUE WED THU FRI SAT 12:01 AM TO 11:59 PM	WEBRTC - 2001	#1 Test_Role	ROOT	#22134602	Active	
#6 Bhaskar	SUN MON TUE WED THU FRI SAT 12:00 AM TO 11:59 PM	MOBILE - 918822038146	#1 Test_Role	ROOT	#22134602	Active	
#7 Agent1	SUN MON TUE WED THU FRI SAT 12:00 AM TO 11:59 PM	WEBRTC - 2002	#1 Test_Role	ROOT	#22134602	Active	
#8 Agent2	SUN MON TUE WED THU FRI SAT 12:00 AM TO 11:59 PM	WEBRTC - 2003	#1 Test_Role	ROOT	#22134602	Active	
#9 Sachin	SUN MON TUE WED THU FRI SAT 9:00 AM TO 11:00 PM	MOBILE - 919211715402	#1 Test_Role	ROOT	#22134602	Active	
#10 bhawesh	SUN MON TUE WED THU FRI SAT 12:00 AM TO 10:00 PM	MOBILE - 8442021533	#1 Test_Role	ROOT	#22134602	Active	
#11 Agent3	SUN MON TUE WED THU FRI SAT 12:00 AM TO 11:59 PM	WEBRTC - 2004	#1 Test_Role	ROOT	#22134602	Active	
#12 bhawesh	SUN MON TUE WED THU FRI SAT 12:00 AM TO 10:00 PM	MOBILE - 8442021533	#1 Test_Role	ROOT	#22134602	Active	
#13 Agent4	SUN MON TUE WED THU FRI SAT 9:00 AM TO 8:00 PM	WEBRTC - 2005	#1 Test_Role	ROOT	#22134602	Active	
#14 Agent5	SUN MON TUE WED THU FRI SAT 12:00 AM TO 11:59 PM	WEBRTC - 2006	#20 role_111	ROOT	#22134602	Active	

Hashmi Employee - Employee List



Active Employee List- The Active Employee List displays all currently active employees along with their working schedules and operational details.

Key Segments:

Employee - Displays the employee ID and name.

Working Time - Shows the assigned working days and time slots during which the employee is available to handle calls.

Role - Defines the role assigned to the employee.

Parent - Displays the parent account or root under which the employee is created.

Created By - Shows the ID of the user who created the employee.

Status - Indicates whether the employee is currently Active or Inactive.

Action - Provides options to manage or modify employee settings.

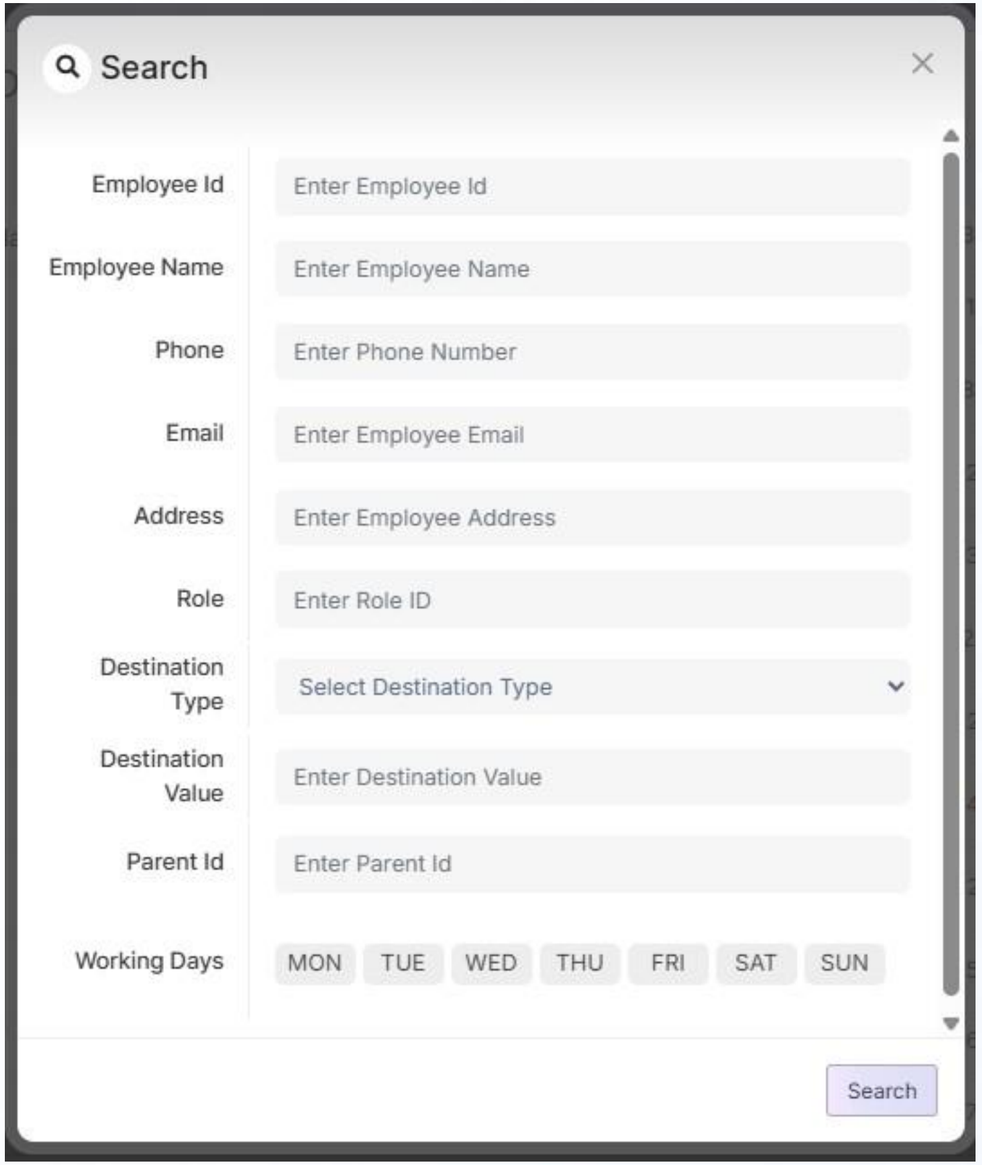
Hashmi Employee: Employee List



Additional Information:

Agent Limit - Displays the maximum number of agents allowed versus currently active agents.
Download - Allows users to export the employee list for reporting or record-keeping purposes.
Search - Enables quick searching of employees within the list.

Employee List: Search Parameters



Users can search for employees using one or multiple parameters to get precise results.

Available Fields:

Employee ID - Search for an employee using their unique employee ID.

Employee Name - Filter employees by their name.

Phone - Search employees based on their registered phone number.

Email - Locate employees using their email address.

Address - Search employees by their registered address details.

Role - Filter employees based on the assigned role ID.

Destination Type - Select the destination type assigned to the employee, such as Mobile or WebRTC.

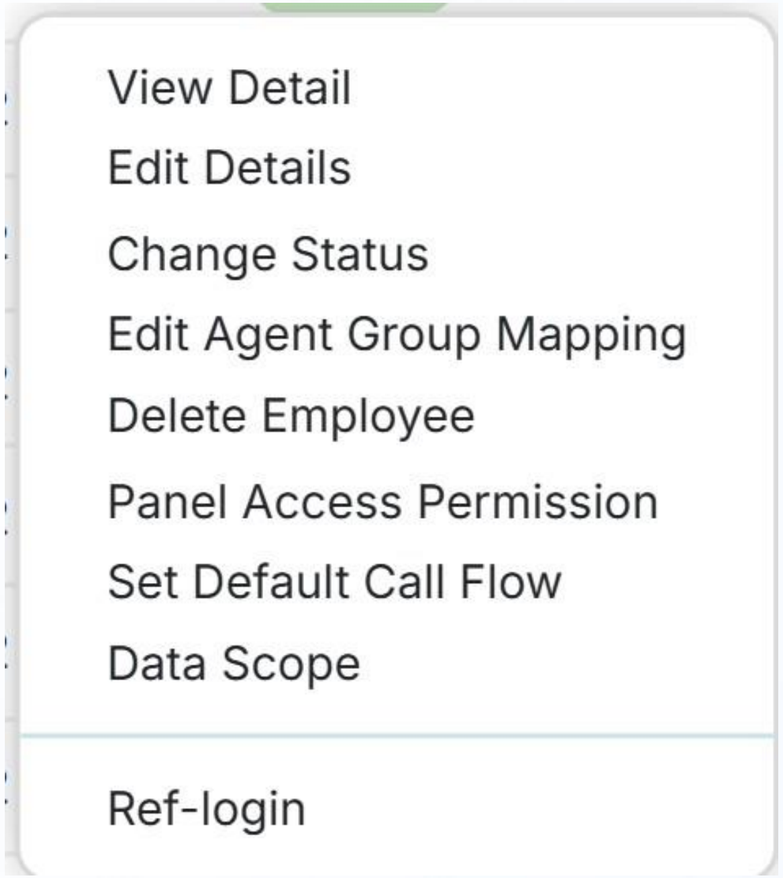
Destination Value - Enter the destination value associated with the selected destination type (e.g., phone number or WebRTC ID).

Parent ID - Search employees under a specific parent or root account.

Working Days - Filter employees based on their assigned working days.

Search Action- After entering the required parameters, click the Search button to display matching employee records in the list.

Employee List : Actions



The Action option is available in each row of the Employee List and provides quick access to employee-specific operations.

Available Actions:

View Detail - Displays complete employee information such as personal details, role, destination, working days, working hours, group mapping, and account details in a read-only format.

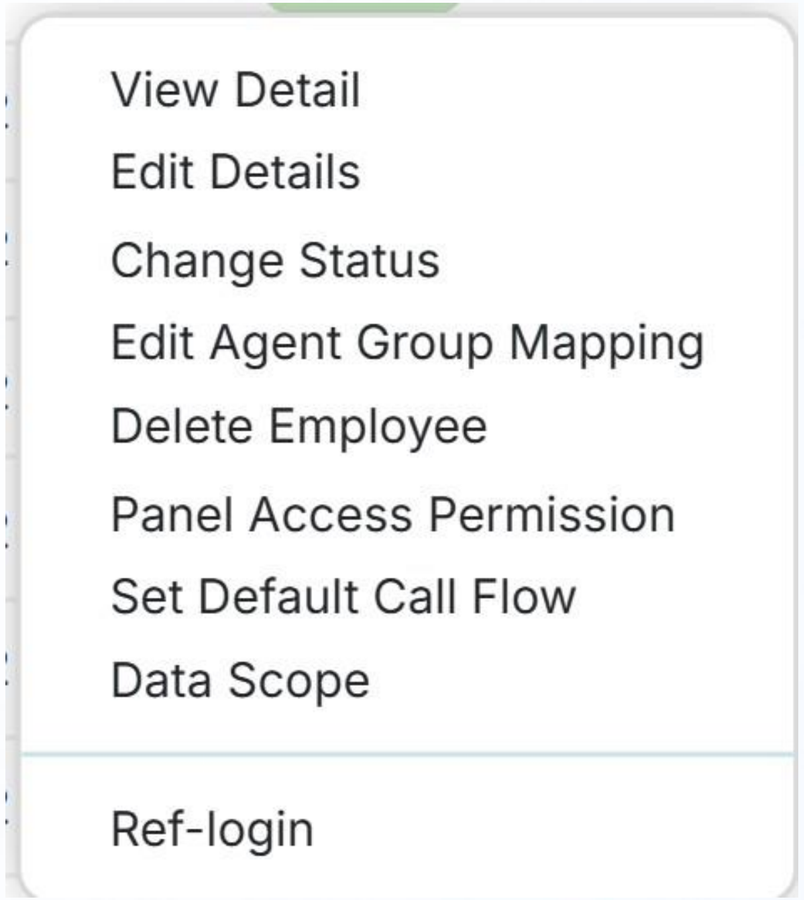
Edit Details - Allows modification of employee profile details including contact information, role, destination, working schedule, group assignment, and call settings.

Change Status - Enables activation or deactivation of an employee, controlling their availability in the system.

Edit Agent Group Mapping - Used to assign or update agent group associations for call routing and handling.

Delete Employee - Permanently removes the employee from the system along with associated data.

Employee List : Actions Menu



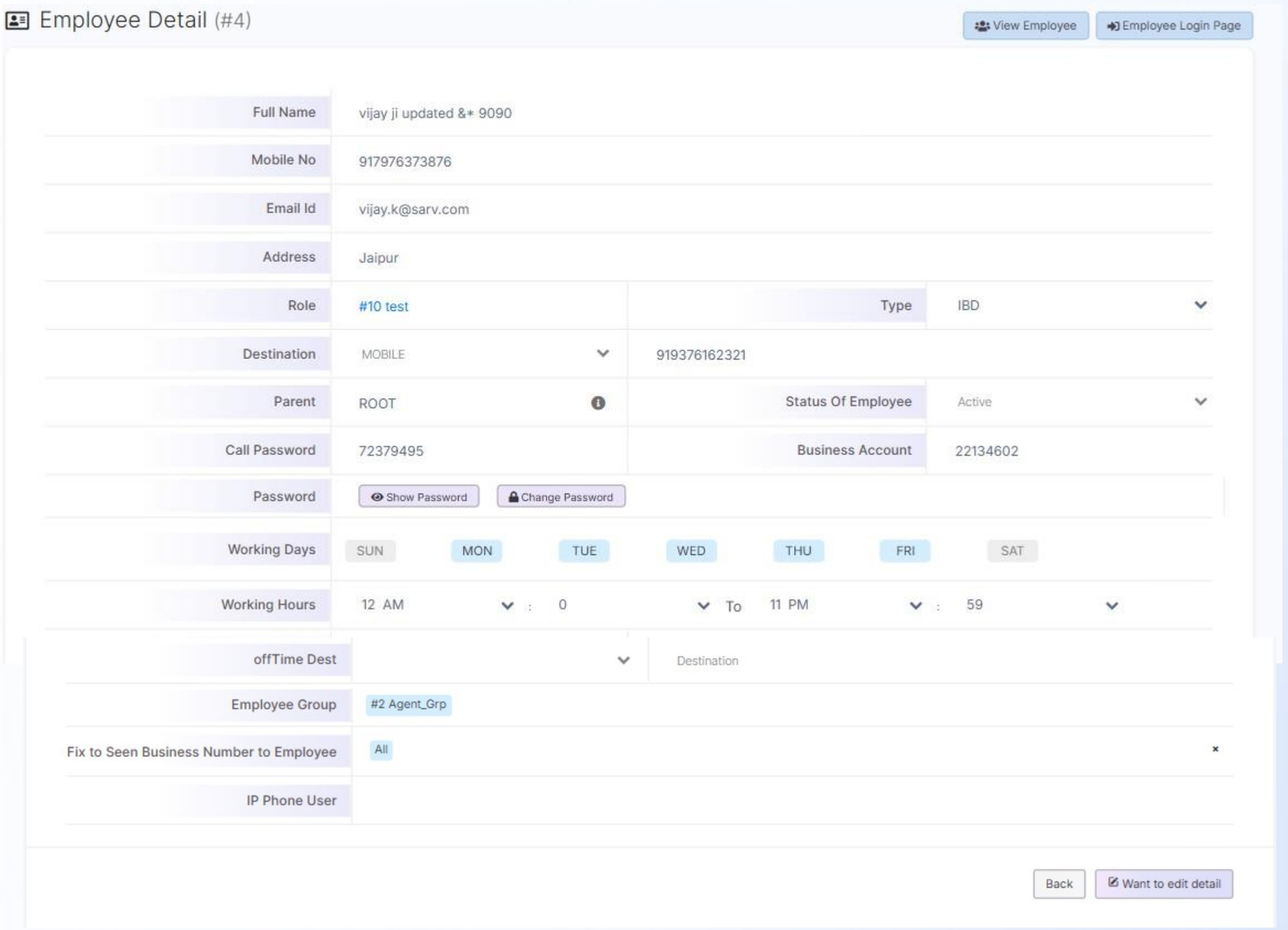
Panel Access Permission - Manages access permissions for campaign, report, callbox, and download modules.

Set Default Call Flow - Assigns a default call flow or IVR to the employee for call handling.

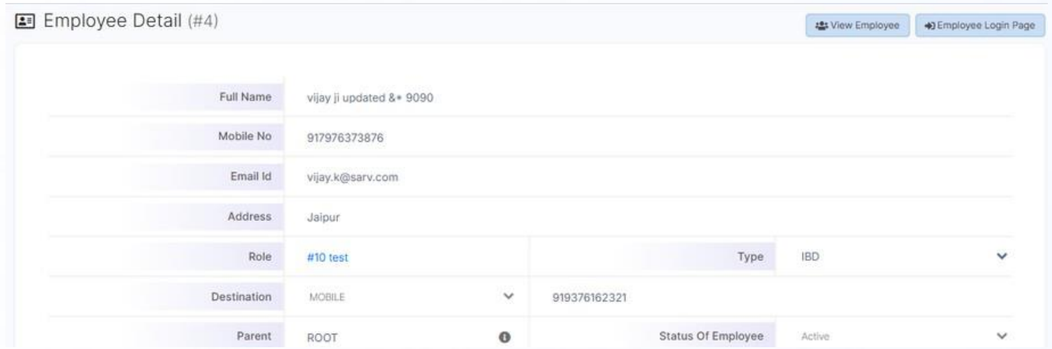
Data Scope - Defines the level of data visibility and access for the employee.

Ref-login -Allows admins to log in as the selected employee dashboard directly with a single click.

Actions Menu: View Details



Actions Menu: View Details



The View Detail option opens a read-only window displaying complete information of the selected employee.
Displayed Information:

Full Name - Shows the employee's full registered name.

Mobile No - Displays the employee's mobile number used for call routing.

Email ID - Registered email address of the employee.

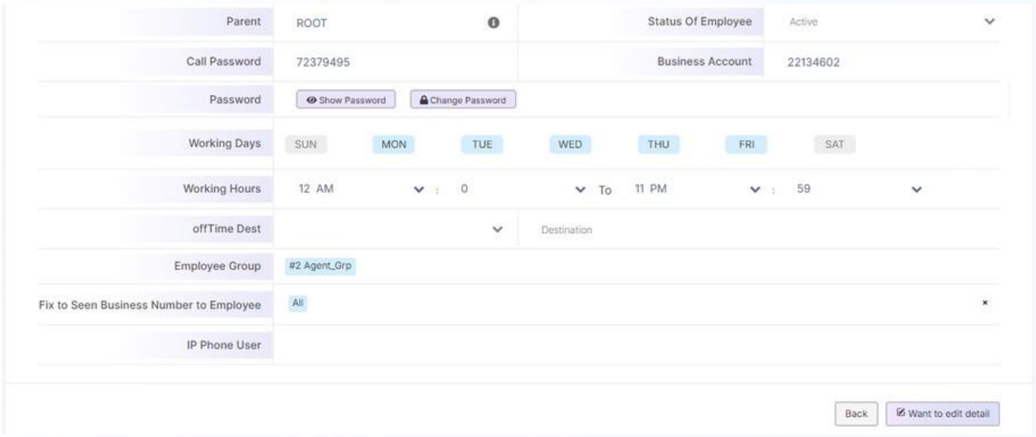
Address - Employee's address details.

Role - Assigned role defining permissions and responsibilities.

Type - Displays the call type associated with the role (e.g., IBD).

Destination - Shows the destination type (Mobile/WebRTC) and destination value.

Actions Menu: View Details



Parent - Indicates the parent or root account under which the employee is created.

Status of Employee - Displays the current status (Active/Inactive).

Business Account - Shows the business account ID linked to the employee.

Call Password - Displays the call authentication password.

Password Options - Allows viewing or changing the login password.

Working Days - Displays assigned working days (Sunday to Saturday).

Working Hours - Shows the start and end time during which the employee is available.

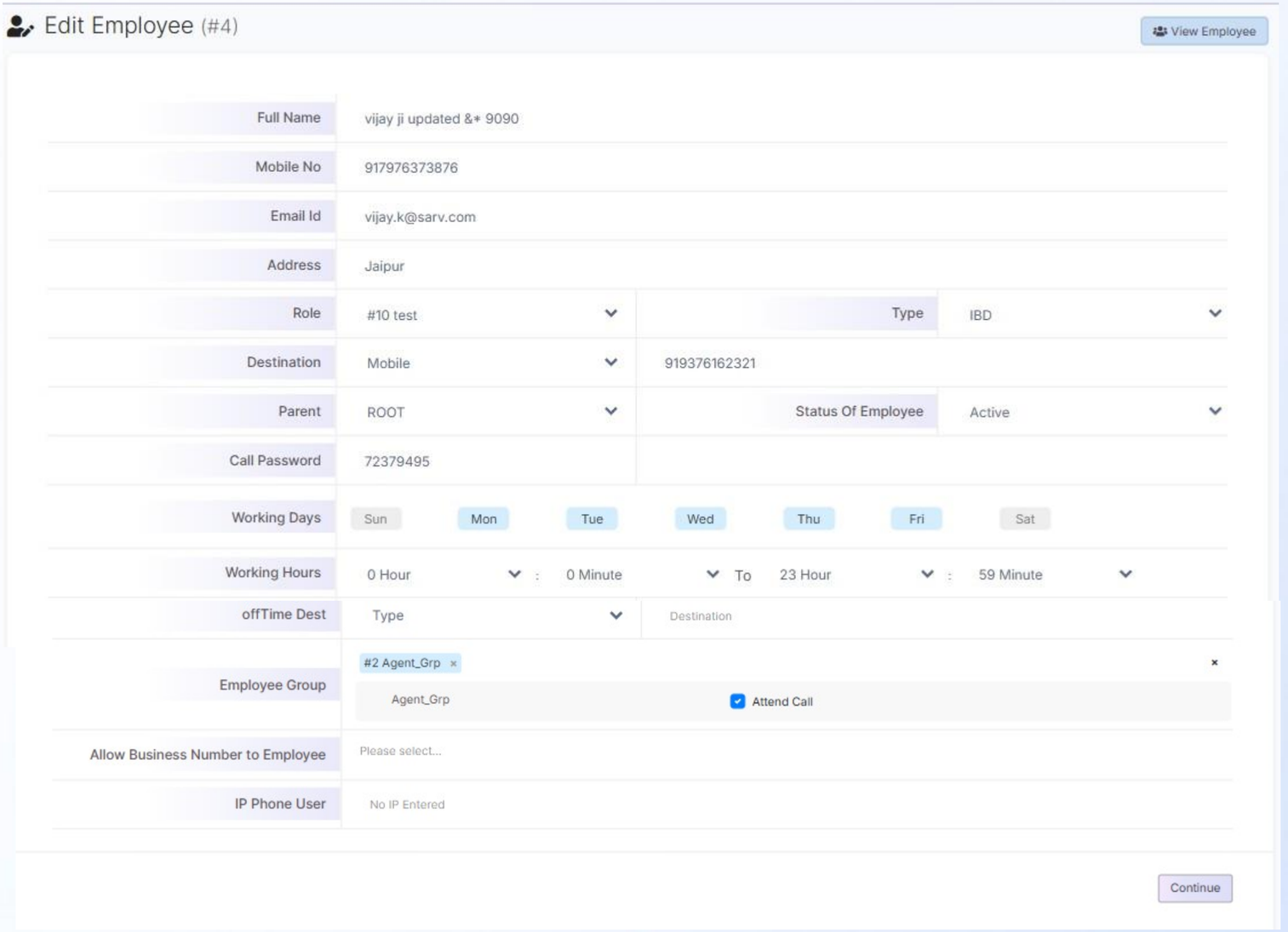
Off-Time Destination - Defines call handling Key Points outside working hours, if configured.

Employee Group - Displays the agent group assigned to the employee.

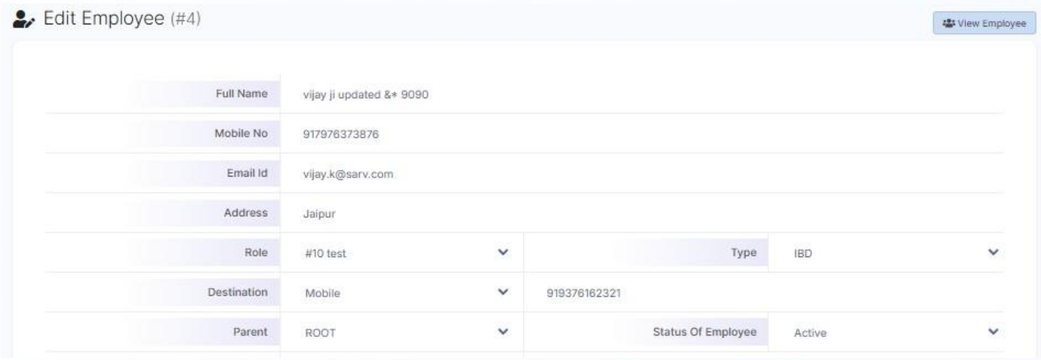
Fix to Seen Business Number to Employee - Controls visibility of business numbers for the employee.

IP Phone User - Displays IP phone user details, if configured.

Actions Menu: Edit Details



Actions Menu: Edit Details



The Edit Details option opens an editable employee configuration window, allowing admins to update profile information, call settings, and working schedules.

Editable Information:

Full Name - Update the employee's registered name.

Mobile No - Modify the mobile number used for call routing.

Email ID - Update the employee's email address.

Address - Edit address details of the employee.

Role - Change the assigned role that defines permissions and access.

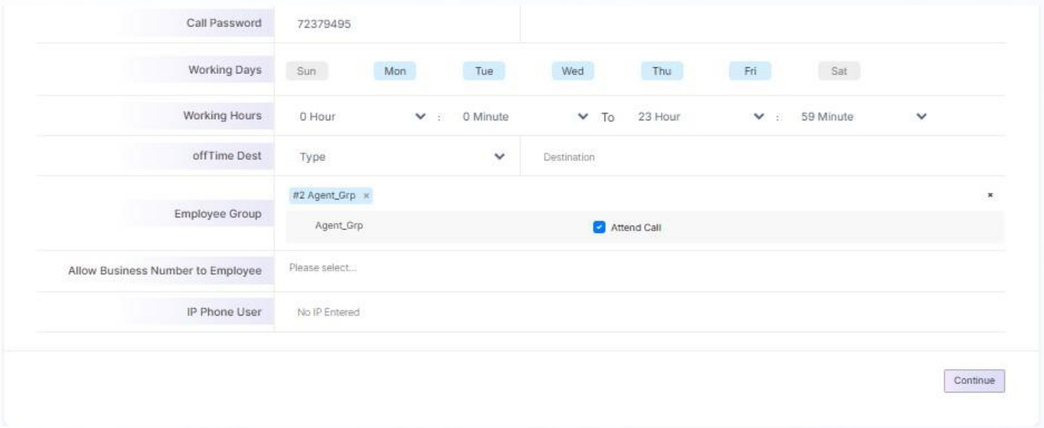
Type - Select the call type associated with the role (e.g., IBD).

Destination - Update the destination type (Mobile/WebRTC) and destination value.

Parent - Modify the parent or root account association.

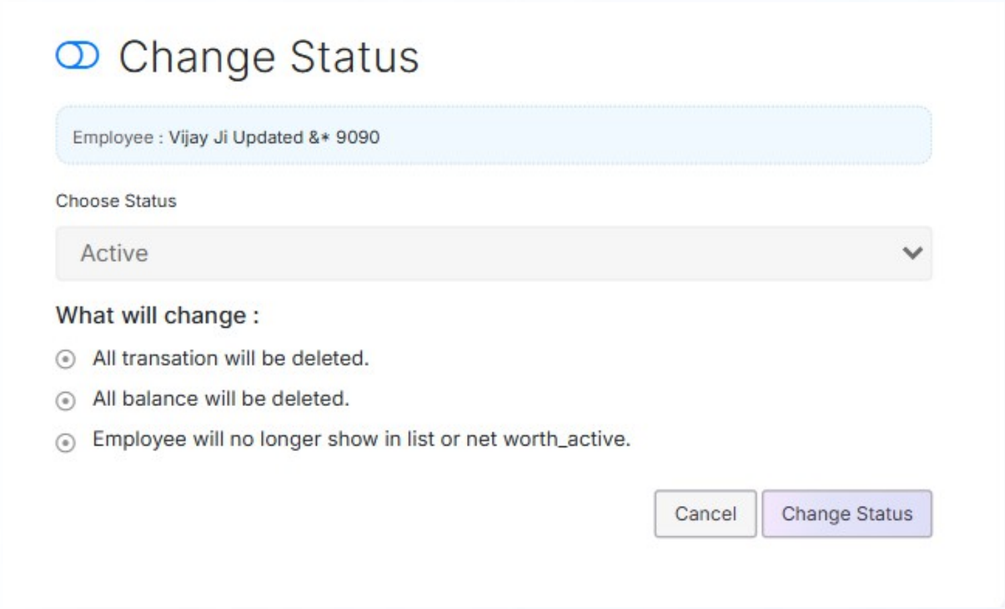
Status of Employee - Change the employee's status (Active/Inactive).

Actions Menu: Edit Details



Call Password - Displays the call password used for authentication.
Working Days - Select the days on which the employee is available.
Working Hours - Define start and end working hours for call handling.
Off-Time Destination - Configure call routing Key Points outside working hours.
Employee Group - Assign or update the agent group and call attend permissions.
Allow Business Number to Employee - Control which business numbers are visible to the employee.
IP Phone User - Configure IP phone user details, if applicable.

Actions Menu: Change Status



The Change Status option allows admins to update the operational status of an employee without modifying or deleting their profile.

Status Options:

Active - The employee is available to handle calls and participate in system operations.

Inactive - The employee is temporarily unavailable and will not receive or handle calls.

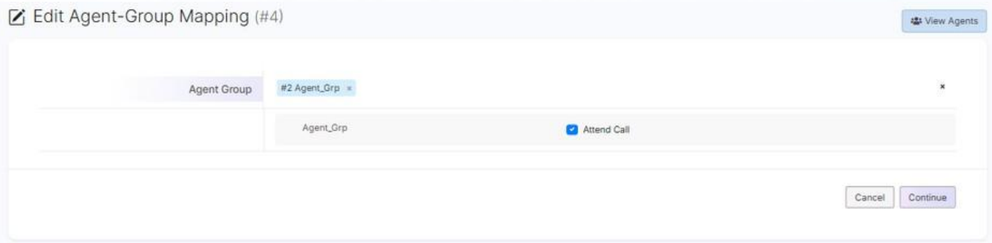
Key Points:

- Status changes take effect immediately.
- Employee data, role, and configuration remain unchanged.
- Inactive employees are retained in the system for future reactivation.

Use Cases:

- Temporarily disabling agents during leave or off-duty hours
- Controlling agent availability during low traffic or maintenance period

Actions Menu: Change Status



The Agent Group Mapping option allows admins to assign or update the groups an employee belongs to. These groups are used for call routing, distribution, and workload management.

Key Segments:

Agent Group - Displays the list of available groups that the employee can be mapped to.

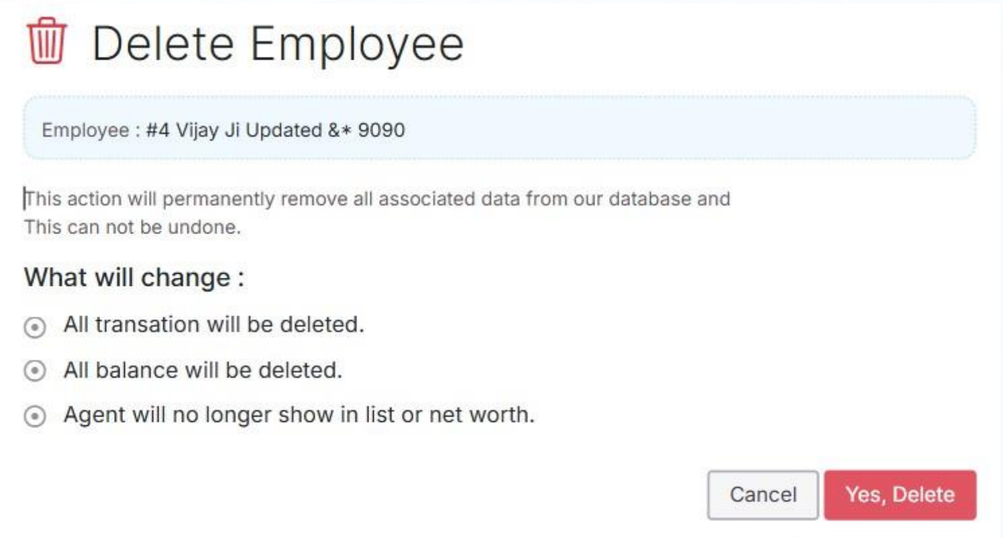
Attend Call - Defines whether the employee is allowed to receive and handle calls for the selected group.

Add / Remove Mapping - Enables assigning or unassigning the employee from specific groups.

Key Points:

- An employee can be mapped to one or multiple agent groups.
- Group changes take effect immediately after saving.
- Call routing follows the updated group configuration.

Actions Menu: Delete Employee



The Delete Employee option allows admins to permanently remove an employee from the system when they are no longer required.

Key Points:

- Removes the employee record from the active employee list.
- The employee will no longer receive or make calls.
- Associated role, group mapping, and call configurations are removed.
- Deleted employees cannot be reactivated unless created again.

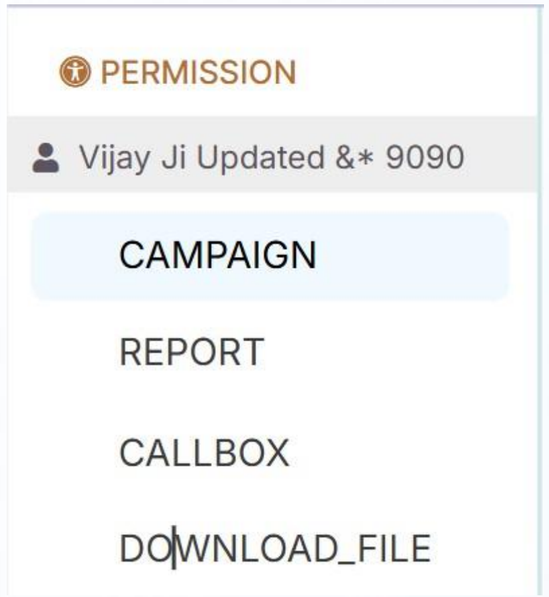
Use Cases:

- Removing employees who have left the organization
- Cleaning up unused or test employee records

Important Note:

Deletion is a permanent action. Deleted employees cannot be restored once removed from the system. Deleted employee records are automatically disabled after 30 days.

Actions Menu: Panel Access Permission



The Panel Access Permission option allows admins to control which dashboard modules and panels an employee can access. It helps enforce role-based access and maintain system security.

Key Permissions:

Campaign Panel - Allows access to campaign creation, management, and monitoring. Ex- Quick Call, C2C.

Report Panel - Enables viewing and downloading call and performance reports.

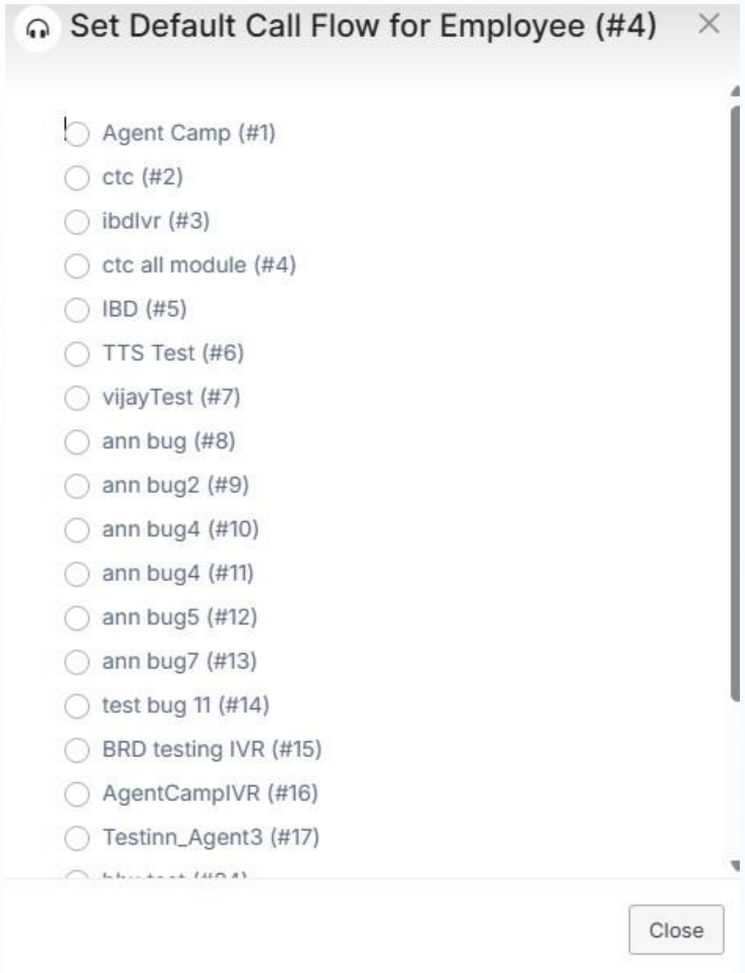
Callbox Panel - Grants access to live call handling and call-related operations. Ex- Enable Callbox panel for employee.

Download Panel - Allows downloading of data, reports, and logs where applicable.

Key Points:

- Permissions can be enabled or disabled per employee.
- Changes take effect immediately after saving.
- Access is restricted based on assigned permissions.

Actions Menu: Set Default Call Flow



The Set Default Call Flow option allows admins to assign a default call flow to an employee. This call flow is applied when the employee receives or initiates calls and no other specific routing rule is defined.

Key Points:

Call Flow Selection - Choose the default call flow (IVR) from the existing list.

Employee Mapping - Links the selected call flow directly to the employee.

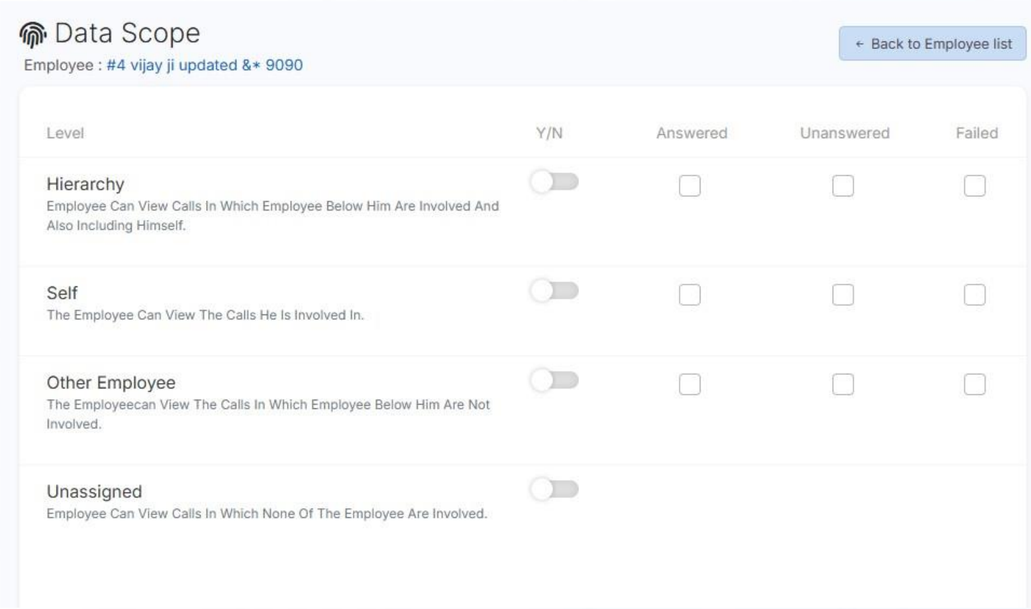
Key Points:

- The assigned call flow is triggered automatically for applicable calls.
- Default call flow is used when no campaign-based or rule-based flow is applied.
- Changes take effect immediately after saving.

Use Cases:

- Ensuring consistent call handling for individual agents
- Assigning personalized IVR or routing logic
- Managing fallback call routing scenarios

Actions Menu: Data Scope



The Data Scope option allows admins to control what data an employee can view across calls, groups, and contacts. It ensures role-based data visibility and maintains operational and data security.

Data Scope is divided into multiple sections, each controlling a specific type of data access.

Level

Defines the level at which call data is visible to the employee.

Hierarchy -Allows the employee to view calls involving themselves and employees below them in the hierarchy.

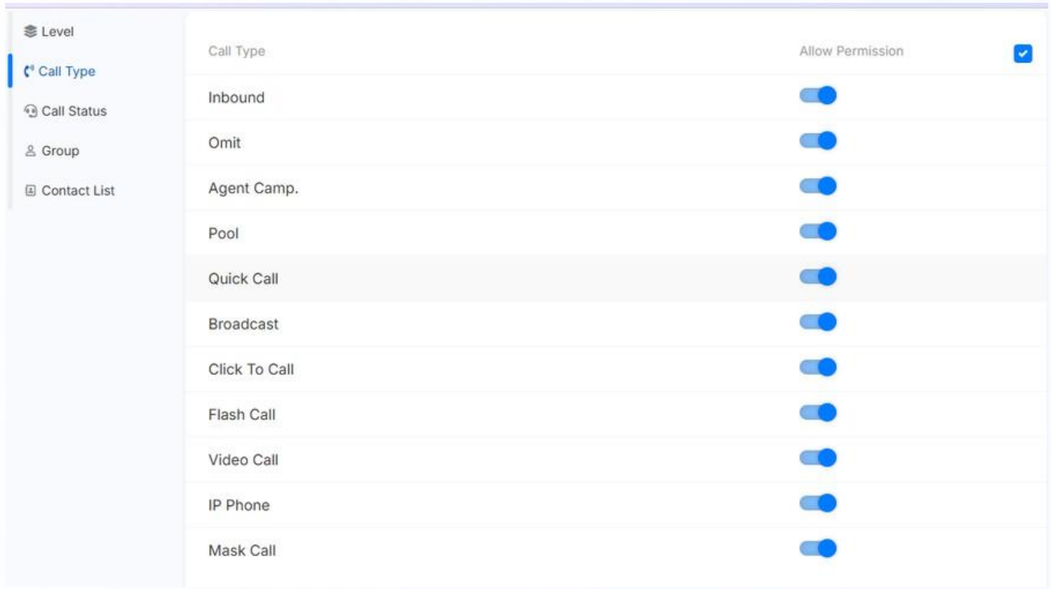
Self -Allows the employee to view only the calls they are directly involved in.

Other Employee -Allows viewing calls of employees not directly involved with the user.

Unassigned -Allows viewing calls where no employee is assigned.

Optional filters can be applied for: Answered, Unanswered, and Failed calls.

Actions Menu: Data Scope



Call Type & Call Status

These section defines what types of calls an employee can view. Visibility can be controlled based on call type and call outcome, ensuring only relevant call records are accessible.

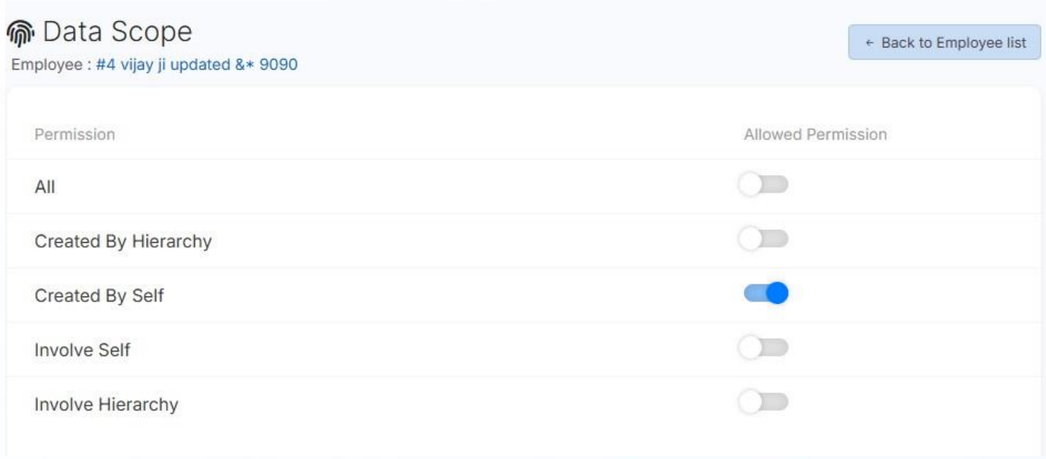
Call Type

Controls visibility based on how calls are initiated or handled, such as inbound, outbound, campaign-based, or system-triggered calls. admins can enable or disable individual call types as required.

Call Status

Controls visibility based on the outcome or state of calls, such as answered, unanswered, rejected, busy, failed, skipped, or disconnected scenarios. Multiple call status combinations can be enabled to define which call results appear in reports and logs..

Actions Menu: Data Scope

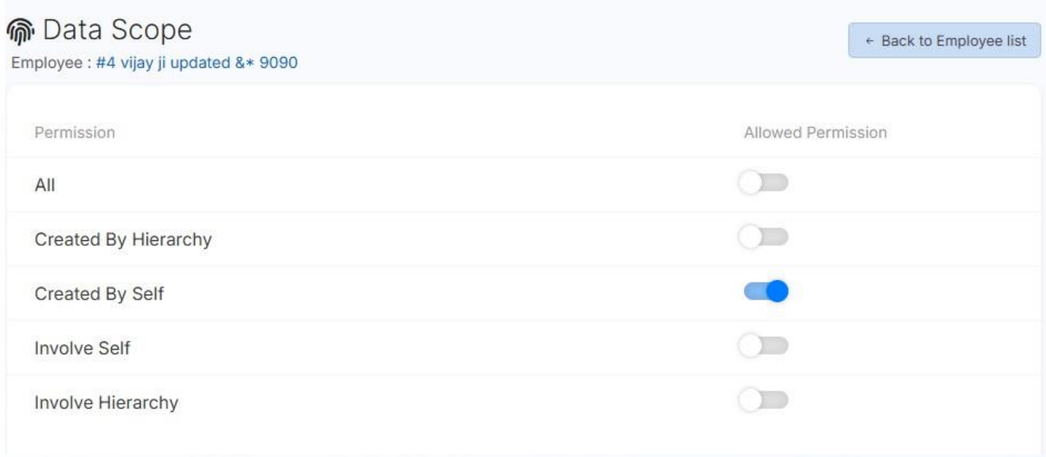


Group

Defines visibility of data based on group association:

All -Access to all group-related data.
Created by Hierarchy -Data created by employees within the hierarchy.
Created by Self -Data created by the employee.
Involve Self -Data where the employee is directly involved.
Involve Hierarchy -Data involving hierarchical users.

Action Menu : Data Scope



Contact List

Controls access to contact records:

All -Access to all contacts.

Hierarchy -Contacts created within the hierarchy.

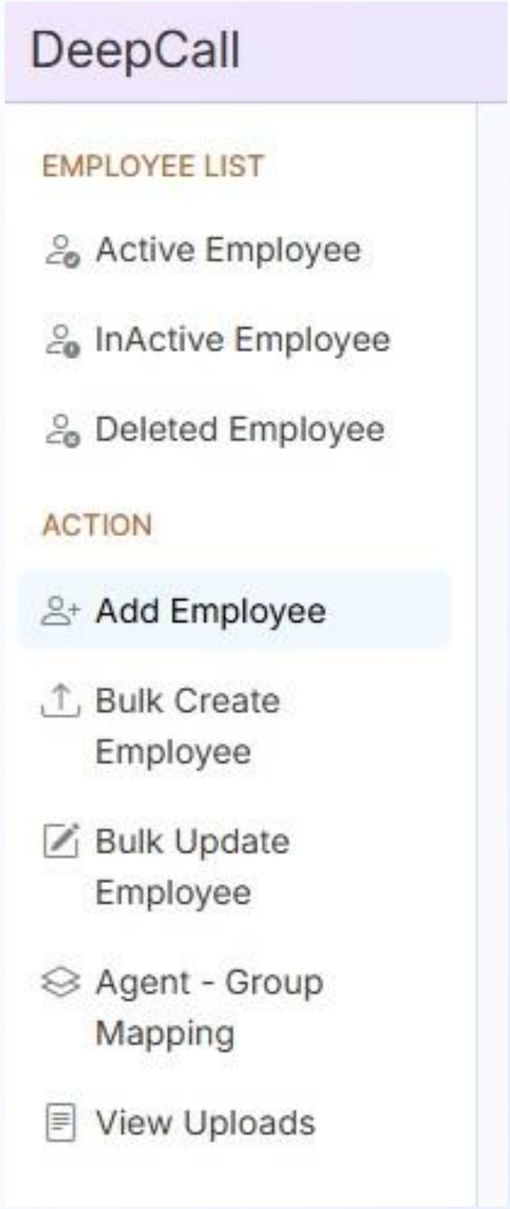
Created by Self -Contacts created by the employee.

Assigned to Agent -Contacts assigned to the employee.

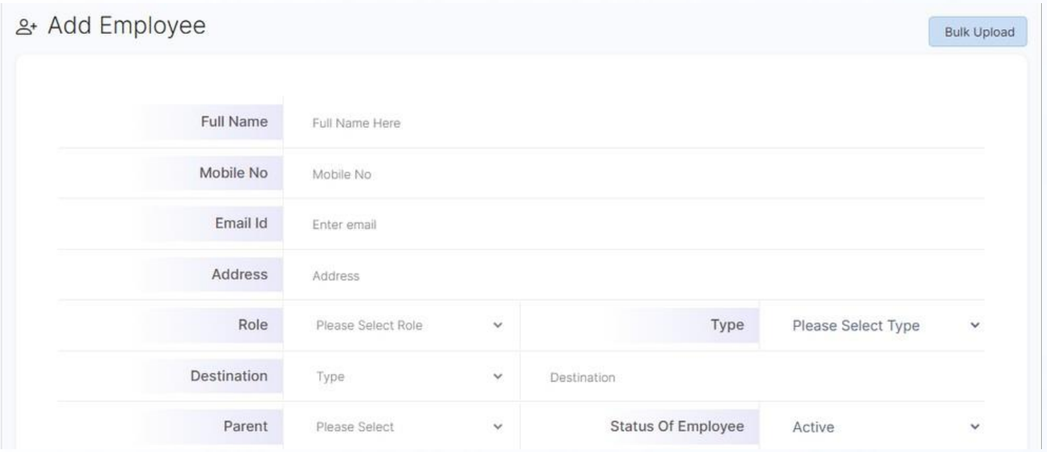
Assigned to Role -Contacts assigned to a specific role.

Assigned to Group -Contacts assigned to a group.

Employee : Action



Action : Add Employee



The Add Employee section allows admins to create and configure new employees in the system. It captures essential personal details, role assignments, call routing preferences, and working schedules to ensure smooth call handling.

Key Fields:

Full Name -Name of the employee.

Mobile No -Contact number assigned to the employee.

Email ID -Email address for communication and identification.

Address -Physical or operational address of the employee.

Role -Defines the employee's access level and permissions within the system.

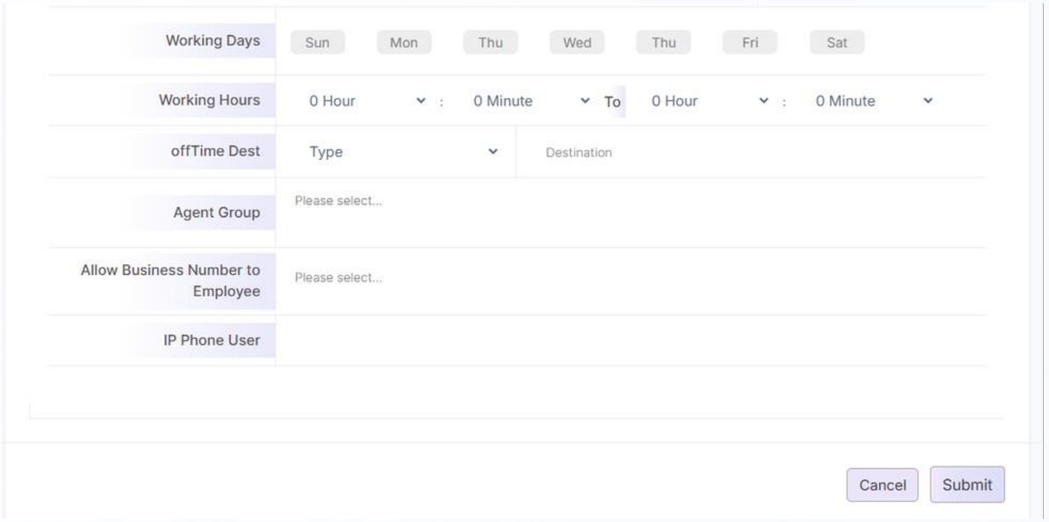
Type -Specifies the call type. Ex- IBD, Campaign, Both.

Destination -Determines where calls will be routed (e.g., Mobile, WebRTC, IP Phone).

Parent -Assigns the employee under a parent or root account.

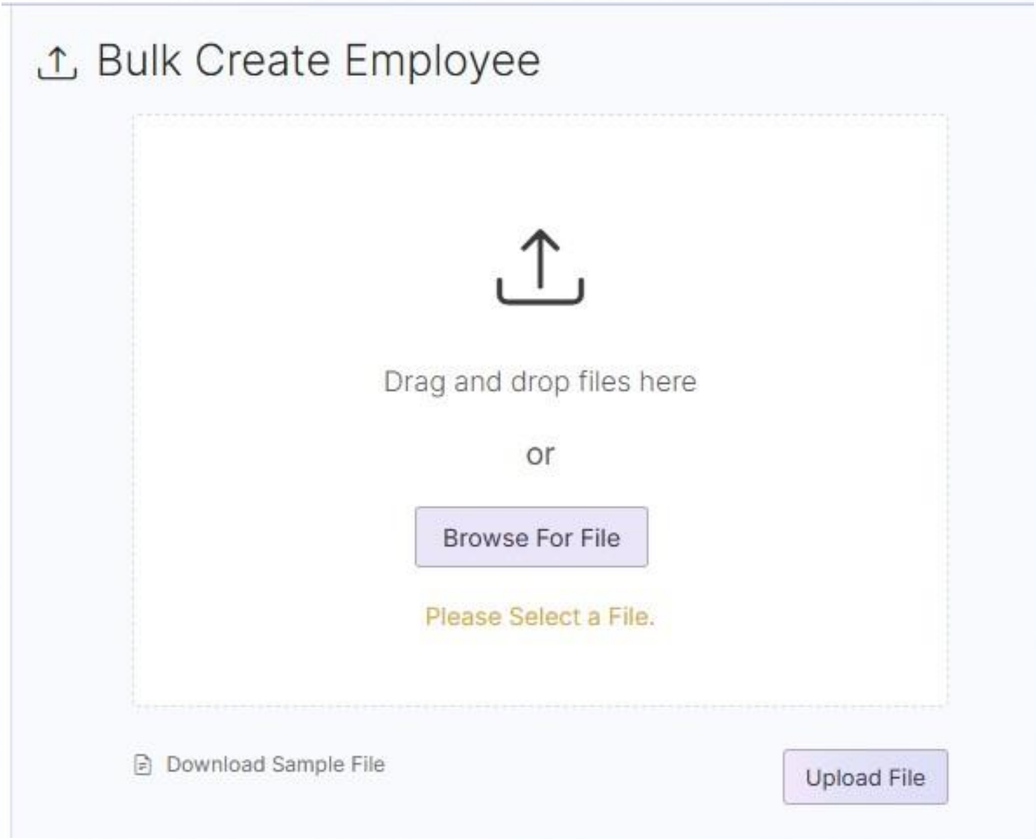
Status of Employee -Sets the employee status (Active/Inactive) at the time of creation.

Action : Add Employee



Working Days -Selects the days on which the employee is available.
Working Hours -Defines the time range during which the employee can handle calls.
Off-Time Destination -Configures where calls are routed when the employee is outside working hours.
Type -Defines the destination type used for off-time or call routing (Mobile, IVR, Group, etc.).
Destination -Specifies the exact number, group, or endpoint to receive redirected calls.
Agent Group -Assigns the employee to an agent group for call distribution and campaign handling.
Allow Business Number to Employee -Controls which business numbers are accessible or visible to the employee.
IP Phone User -Enables the employee to use IP/SIP-based calling instead of a mobile number.
Additional Options:
Bulk Upload - Allows multiple employees to be added at once using a bulk upload option.

Action : Bulk Create Employee



The Bulk Create Employee feature allows admins to add multiple employees at once using a predefined template, saving time and ensuring consistency.

Key Features:

Sample File Download -A reference file is available for download to guide users on the correct format and required fields.

File Upload Options -Users can either drag and drop the file or browse to upload it from their system.

Header Row Handling -The first row of the file is treated as a header and will not be inserted into the system.

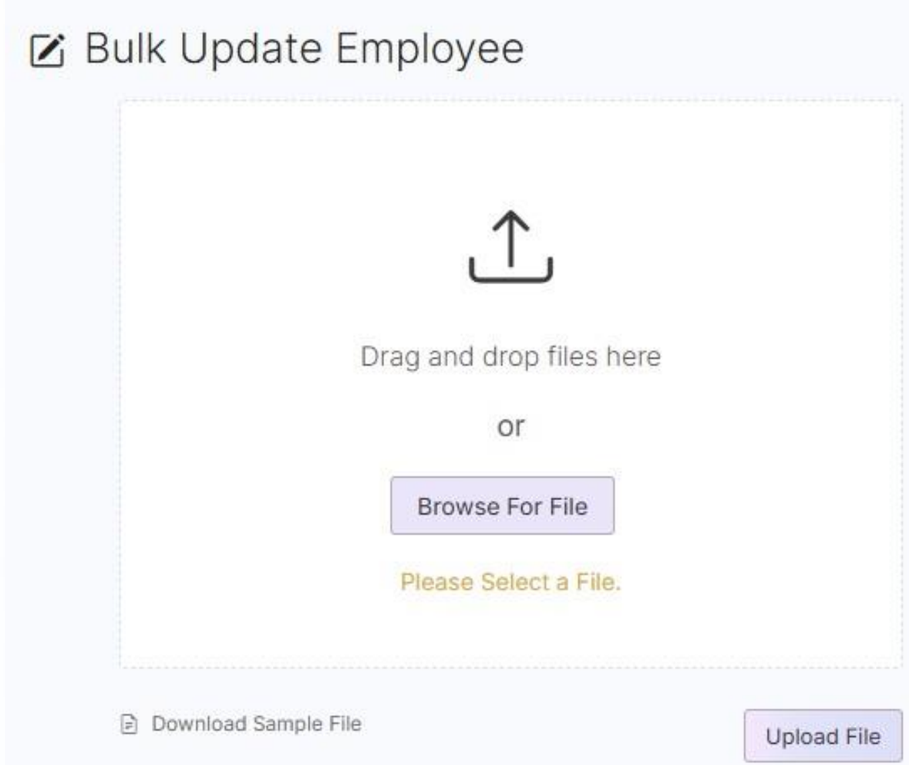
Column Sequence Validation -The sequence of columns must exactly match the format provided in the sample file.

Required Fields -Mandatory fields are clearly indicated in the sample file and must be filled for successful upload.

Benefit:

Enables quick and accurate onboarding of multiple employees while minimizing manual entry errors and configuration inconsistencies.

Action : Bulk Update Employee



The Bulk Update Employee feature allows admins to update details of multiple existing employees simultaneously using a predefined template.

Key Features:

Sample File Download -A reference file can be downloaded to understand the supported fields and required update format.

File Upload Options -Users can drag and drop the file or browse to upload it from their system.

Header Row Handling -The first row of the file is considered a header and will not be processed for updates.

Column Sequence Validation -The column order must strictly follow the sequence defined in the sample file.

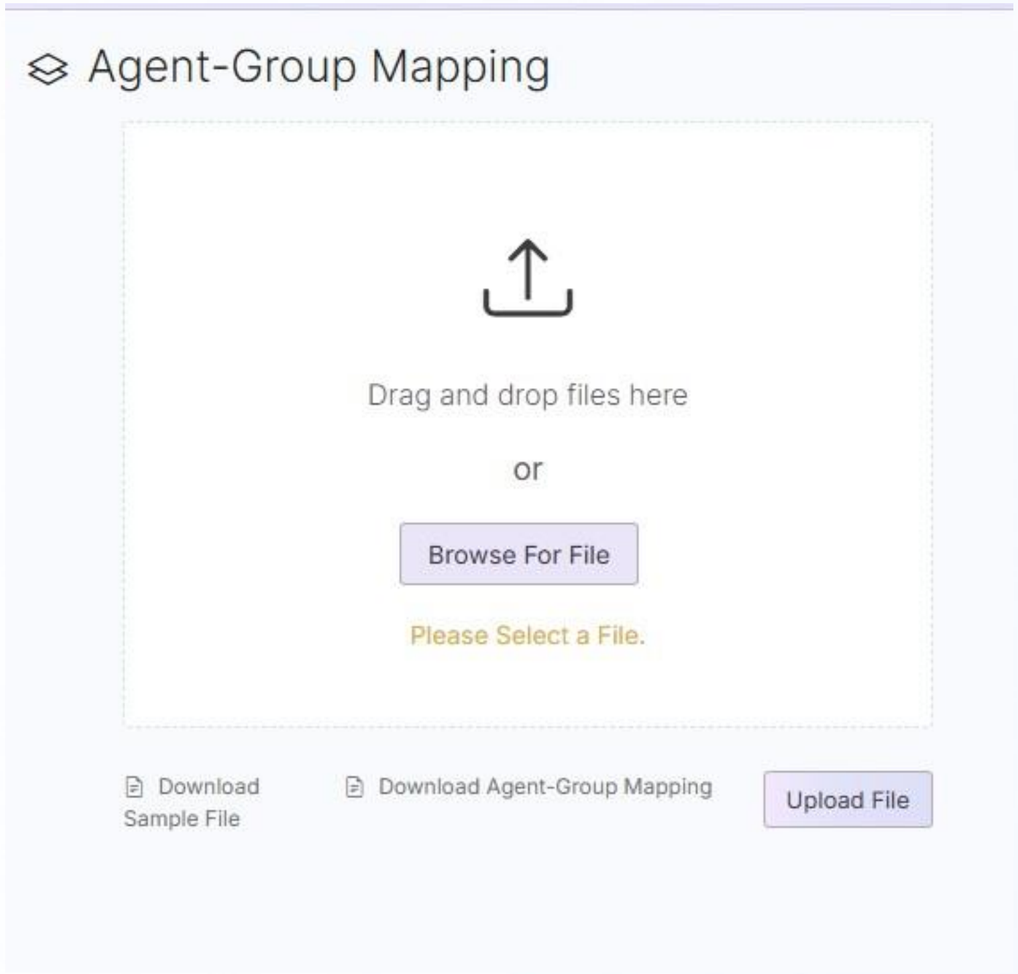
Required Fields -Mandatory fields are clearly marked in the sample file and must be provided to successfully identify and update employees.

Selective Updates -Only the fields provided in the file will be updated; remaining employee details will remain unchanged.

Benefit:

Simplifies bulk modifications such as role changes, working hours updates, or destination updates while ensuring accuracy and minimizing manual effort.

Action : Agent-Group Mapping

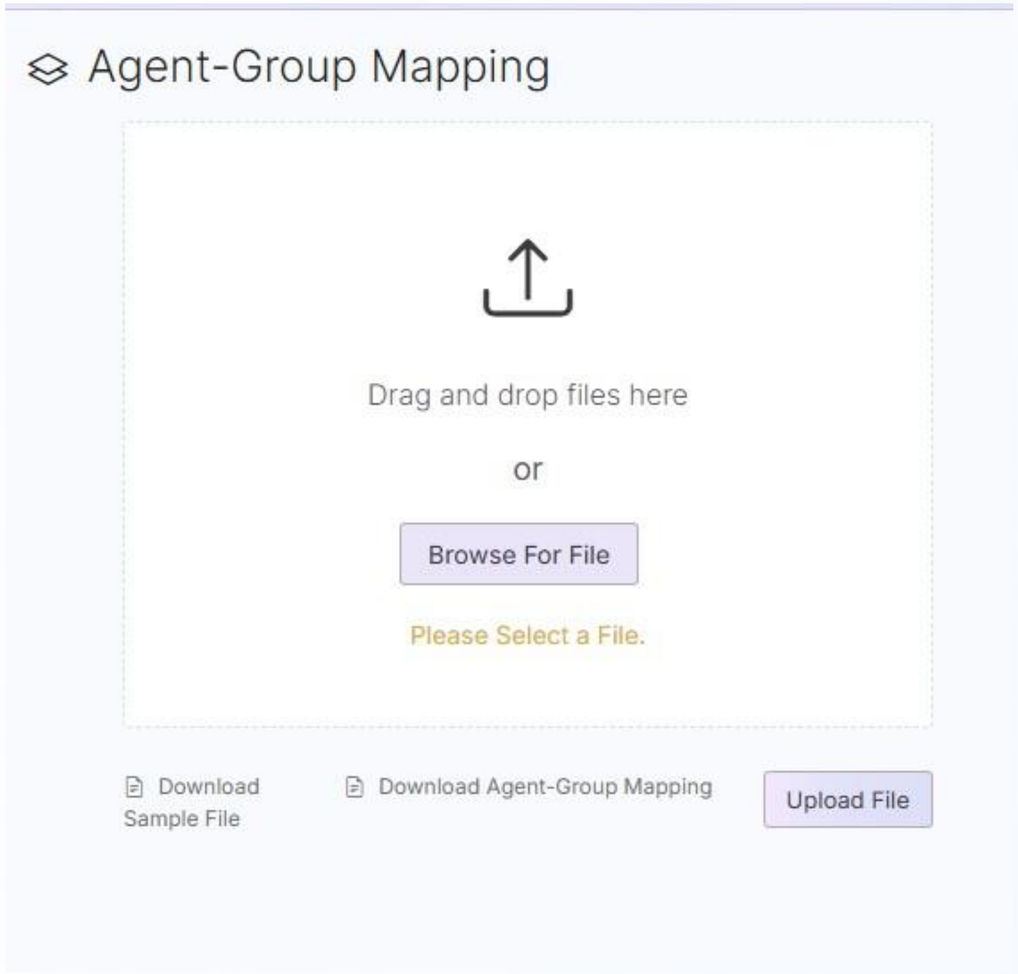


The Agent–Group Mapping feature allows admins to assign agents to specific groups in bulk using a predefined file format. This helps organize agents based on their skills or domain knowledge, making it easier to route calls to a specific agent or to a targeted group of agents with relevant expertise.

The section supports file-based upload, where users can either drag and drop the file or browse and upload it manually.

A sample file is available for download to ensure correct formatting before upload.

Action : Agent-Group Mapping



Key Fields:

The system considers the first row as a header, so it will not be inserted into the database. The sequence of columns must exactly match the format provided in the sample file to avoid upload errors.

The mapping file includes the following fields:

Agent ID - Identifies the agent to be mapped (mandatory).

Group - Specifies the group to which the agent will be assigned.

Receive Call - Defines whether the agent is allowed to receive calls for the mapped group.

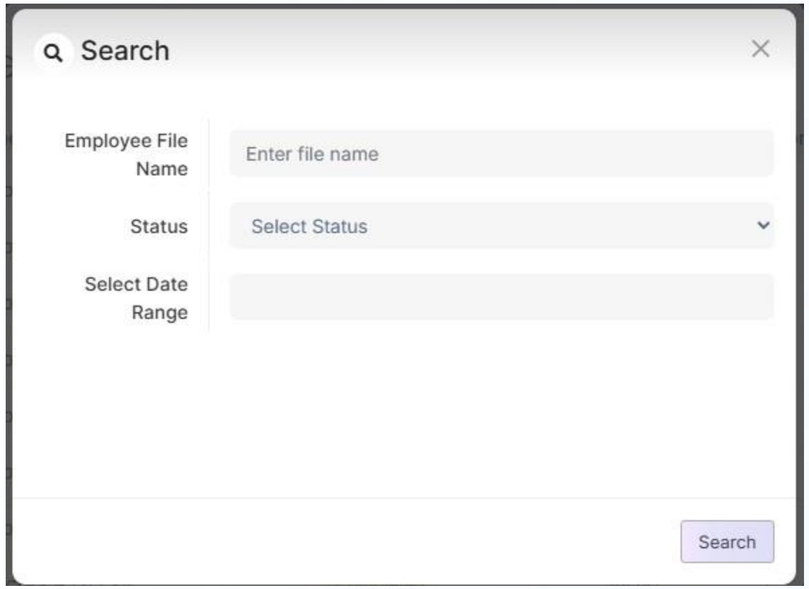
Once the file is uploaded, the system processes the mappings and assigns agents to the respective groups accordingly.

Action : View Uploads

Uploaded Files 33

S.No.	File Name	Status	Uploaded At	Type	Total Records	Uploaded Records	Rejected Records	Action
1	Sample File (4).csv	Completed	11 Dec 2025 11:55:47 AM	Update	1	1	0	
2	Sample File.csv	Completed	10 Dec 2025 10:50:38 AM	Insert	1	1	0	
3	Sample File.csv	Completed	10 Dec 2025 10:44:19 AM	Insert	1	0	1	
4	Sample File.csv	Completed	10 Dec 2025 10:43:49 AM	Insert	1	1	0	
5	Sample File.csv	Completed	10 Dec 2025 10:41:40 AM	Insert	1	0	1	
6	Sample File 99.csv	Completed	06 Oct 2025 04:20:57 PM	Insert	35	0	35	
7	Sample File (5).csv	Completed	06 Oct 2025 04:00:38 PM	Insert	1	0	1	
8	bulk create (1).csv	Completed	01 Oct 2025 03:33:16 PM	Insert	1	0	1	
9	My Excel Sheet - Sheet5 (9).csv	Completed	01 Oct 2025 11:32:31 AM	Insert	2	2	0	
10	My Excel Sheet - Sheet5 (8).csv	Completed	01 Oct 2025 11:23:57 AM	Insert	2	0	2	
11	bulk agent group mapping (2).csv	Completed	25 Sep 2025 06:16:01 PM	Update	1	1	0	

Action : View Uploads



The View Uploads section displays a history of all bulk employee upload activities, including bulk create and bulk update operations.

Columns Description:

S. No. - Sequential number of the uploaded file entry.

File Name - Name of the uploaded file.

Status - Indicates the current processing status of the upload (e.g., Completed, Processing).

Uploaded At - Date and time when the file was uploaded.

Type - Specifies the upload type (Bulk Create or Bulk Update).

Total Records - Total number of records present in the uploaded file.

Uploaded Records - Number of records successfully processed and uploaded.

Rejected Records - Number of records rejected due to validation or data errors.

Action - Provides the option to delete the uploaded file record.

Behavior:

- Rejected records can be reviewed to identify data issues.
- Deleting a file removes the upload record from the list but does not affect already processed employees.

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THANK YOU!

DO YOU HAVE ANY QUESTIONS?

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