freshcaller

Getting started with

Freshcaller

An admin's guide

CONTENTS

freshcaller

Freshcaller helps you easily manage all your call center operations from a single screen. We are a nimble cloud-hosted call center software that eliminates all the snags of setting up and using clunky hardware for handling your calls.

- ✓ Simple and quick to onboard

- ✓ Easily customizable

- ✓ Intuitive call center metrics

- ✓ Real-time call center insights

- ✓ Multi-level access

Note to the Admin

As a Freshcaller Admin, you'll have access to power features like Live Dashboard and the Admin panel. This guide will tell you how to access and use them.

Note: If you're an Account Admin you'll have additional access to billing information and phone credit balance.

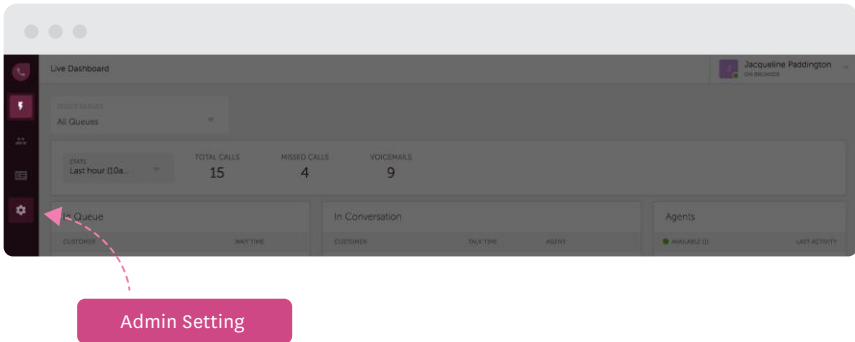A Freshcaller account can have multiple Admins and Account Admins.

FAQ

What are the different levels of access in Freshcaller?

A Freshcaller user can be:

- An Account Admin
- An Admin
- A Supervisor, or
- An Agent

How can I find out if I have Admin access?

If you have Admin access you will be able to view the the Admin icon on the sidebar at the left.

Admin Setting

## Can I add phone credits to my account?

If you are an Account Admin you can check your phone credit balance and add credits to your Freshcaller account.

How do I know if I'm an Account Admin?

If you signed up and created a brand new Freshcaller account, you'll be an Account Admin by default.

If you were added as an Account Admin to an existing account, you can look for the Billing tab on the Admin panel. This option is not displayed to any other roles including Admins. You will also be receiving invoices from Freshcaller.
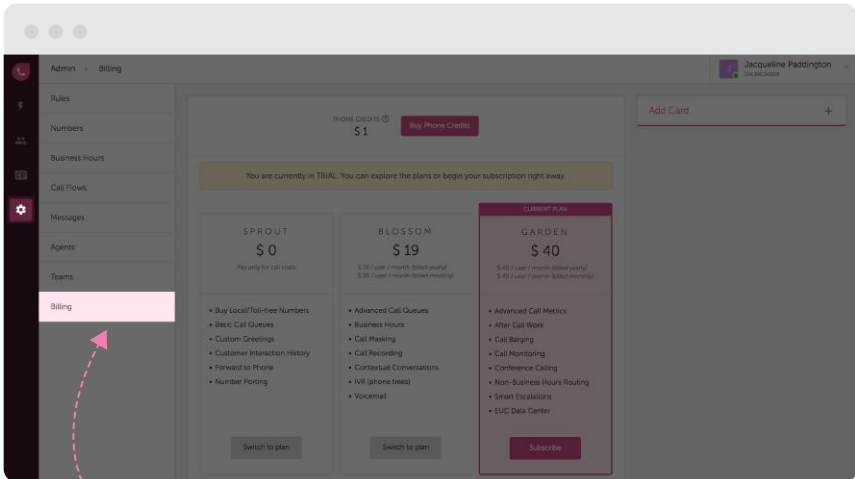
Only an Account Admin can access the Billing tab.

Account activation & login

- Activation email
- Logging in
- Adding credits

Activation email

You'll receive an activation email from us once you sign up with Fresh-caller or if you get added as an Admin of an existing account. Click on the activation URL provided in the email to activate your account.
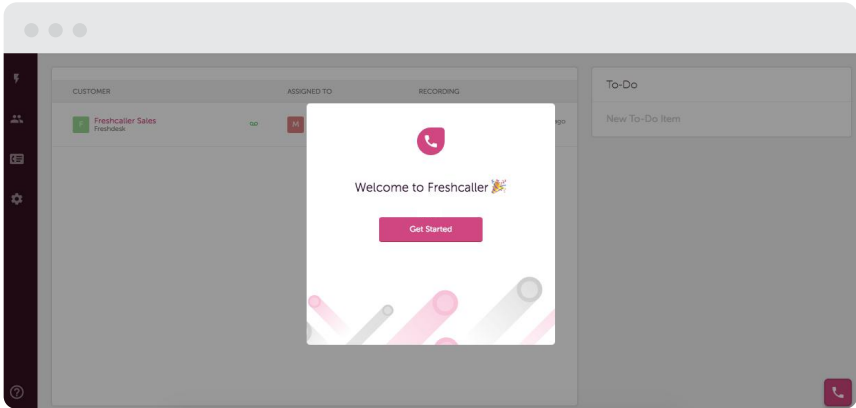
This will take you to the login screen where you can enter your email id, and set a password for your account.

> **Note:** As mentioned earlier, if you are the first person to sign up and create the account, you are an Account Admin by default.

Logging in

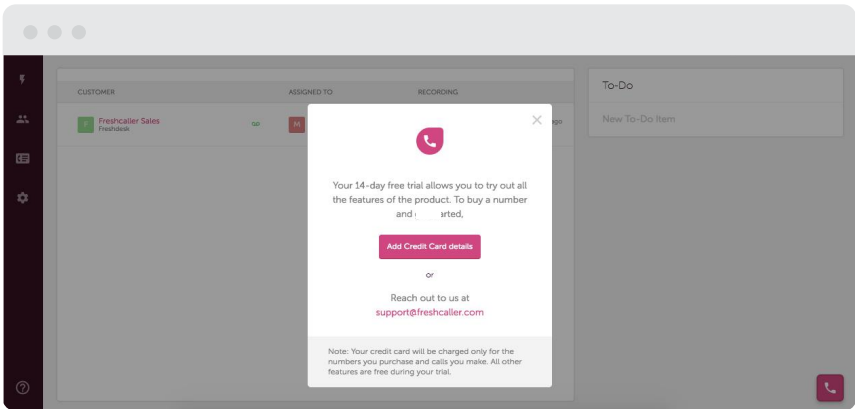On successfully logging in, you are directed to the home screen of your Freshcaller account.

Adding credits

If you are on trial, you have to add credits to

- Buy numbers
- Make calls

To check your credit balance, click on the **Add Credit Card Details** button after you get started.

You'll be taken to the billing page of your account. Right on top of the page, you can find your credit balance.

Alternatively, you can click on the **Billing** tab in your Admin panel.

In case you do not want to add your credit card to your account, send an email stating the same to support@freshcaller.com.

Check your current credit balance from here.

Recharge your account by adding your credit card.

Setting up your call center block by block

- Buying and managing numbers
- Managing agents and their roles
- Setting up teams
- Configuring business hours
- Managing messages

Buying and managing numbers

Using your phone credits, you can buy numbers, make and receive calls, and much more. What's more, you can buy local numbers in 50+ countries.

To port your existing numbers into the Freshcaller account, contact support@freshcaller.com

To buy a number, go to your **Admin settings** > **Numbers** > **Buy New Number.**
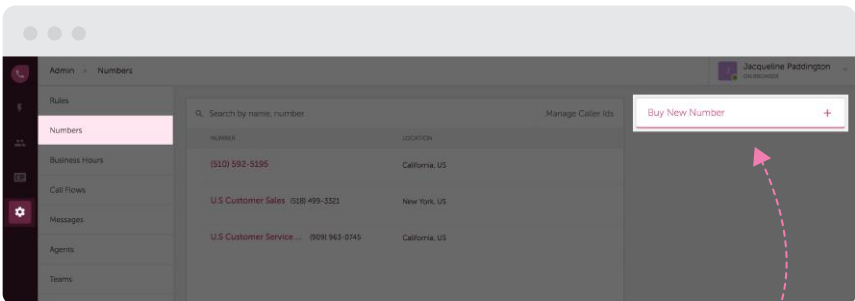
Click this button to buy a new number.

You can choose any number that suits your geography or business requirement.

On choosing a number, you'll be able to see its cost. To confirm your purchase, click Buy.

Once the number is purchased, it gets listed alongside your other purchased numbers.

Edit or delete the number from here.
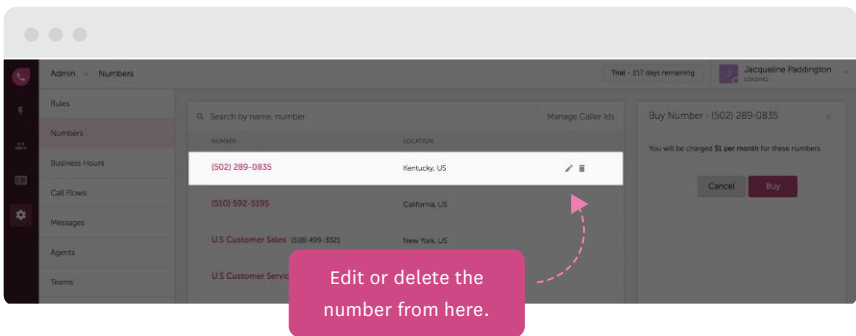
If you want to give a name to your number, use the Edit icon and customize the properties of your number.

Edit the properties of your number from here.
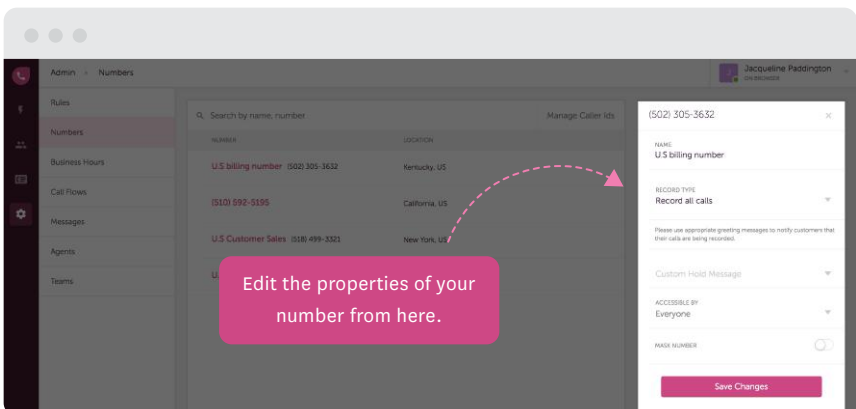
The customizable properties of a number are:

Call recording: From the Record Type dropdown you can choose to

- Record all calls
- Record incoming/outgoing calls
- Record manually (recommended if your call center needs to be GDPR compliant)

Custom hold message: Hold messages are played when an agent puts a caller on hold. You can select your hold message from the existing list of messages in the Custom Hold Message dropdown. Or, add a new message right there, without going to the Messages tab.

Accessibility: Choose which teams have access to this number.

Call masking: You can mask your helpline number to look like a personal number by enabling the toggle for call masking. You can also buy a local number and use this option to mask your call center number to establish a more local presence.

> **Note:** Check out our call and number charges here.

Managing agents and their roles

As a Freshcaller Admin, you can add new agents and also assign them roles to manage their levels of access.

To add new agents to your account, go to the **Agents** section in the Admin panel. Use the **New Agent** button to add your agents.

Invite all your call center agents to your Freshcaller account.
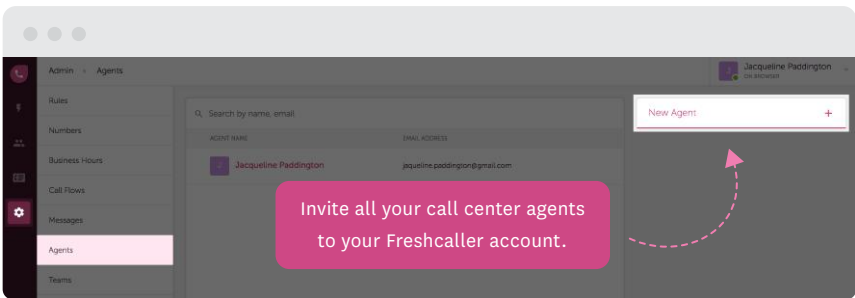
In the overlay that opens up, enter the email address of your agent and assign the appropriate role — Agent, Supervisor or another Admin.

Provide a unique email address of your agent to add them successfully to your account.
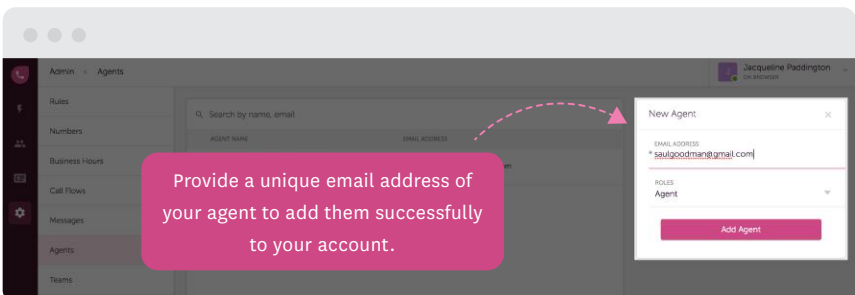
Once you add an agent, you can choose to

- Resend an activation email to the added agent

- Edit their role

- Remove them from the system


Resend an activation email to onboard your agents.
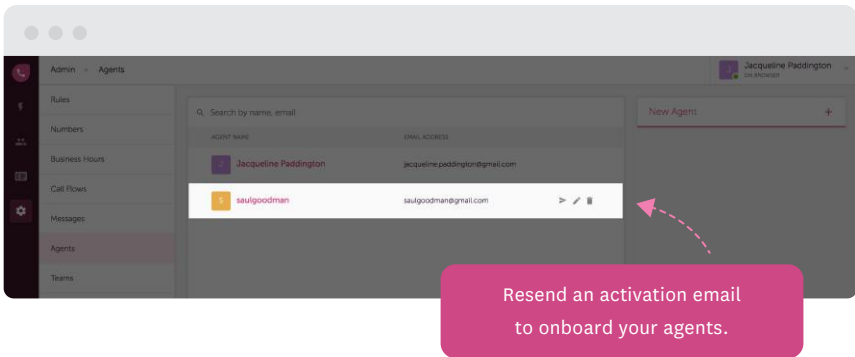
**Note:** A deleted agent can be restored if needed from your account.

Setting up teams

You can group your agents into different teams. This comes in handy when you have multiple functions using the same number, and also while setting up call flows.

To create separate teams, go to the Teams section in the Admin Settings. Use the New Team button to create a team and add agents to it.
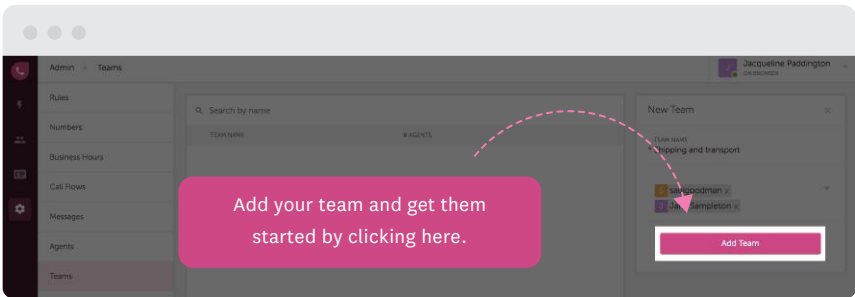

Add your team using this option.
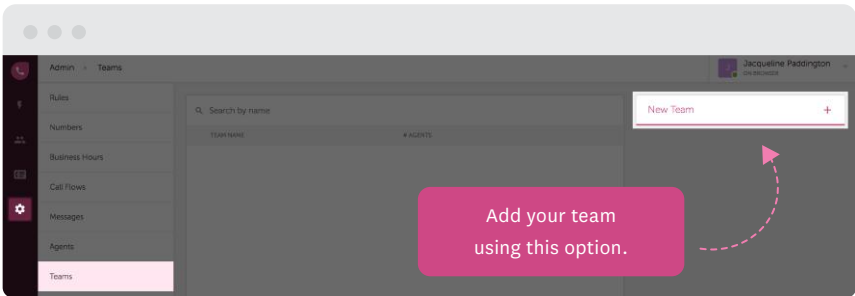
Once you click on the 'Agents' dropdown, all your agents will be listed for you to choose from. Every chosen agent has a tick against their name. You can add multiple agents at one go.

Choose from the list of saved agents and create different teams.
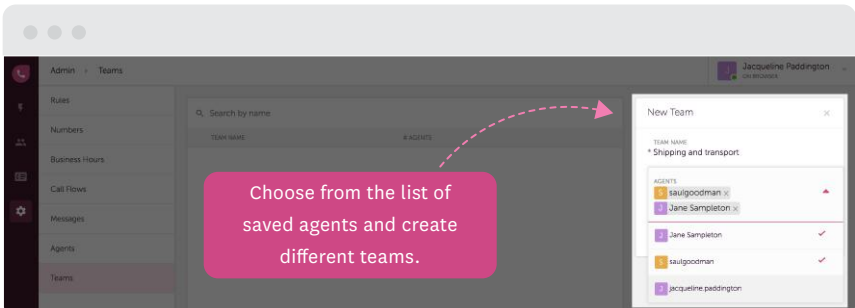
After choosing the agents for the new team, click the Add Team button.

Add your team and get them started by clicking here.

The added team gets listed under saved teams showing the name and strength of the team upfront.

Saved teams get listed here with the number of agents per team.
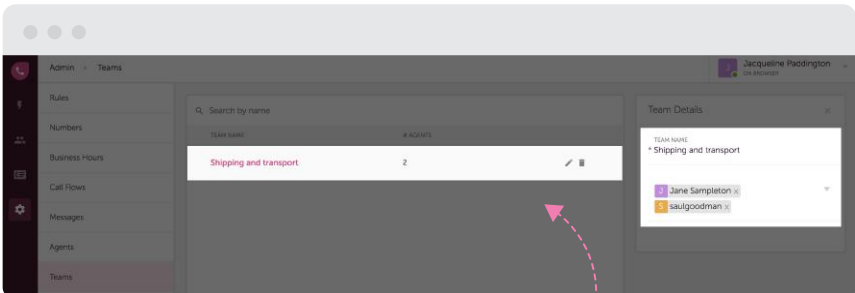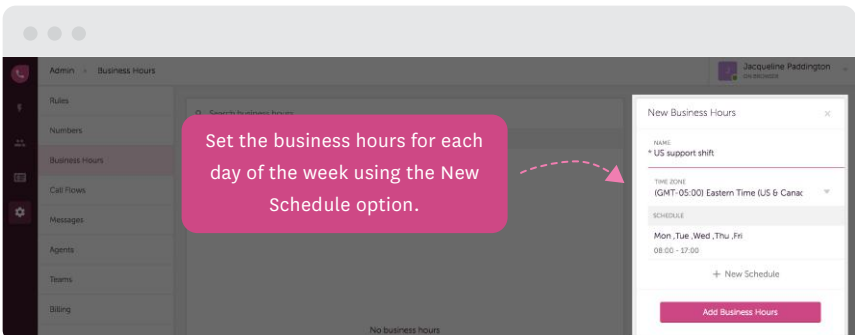
Configuring business hours

Your business might be functioning only during a certain part of the day. Manage your calls optimally by choosing when you want to receive calls.

Your call center may also be working across different time zones or your teams might be working in different shifts. On Freshcaller, you can define your various working hours or shifts in the time zone of your preference.

You can set the business hours for your phone numbers using the **Admin Settings** > **Business Hours** > **New Business Hours**

Set the business hours of your call center from here.
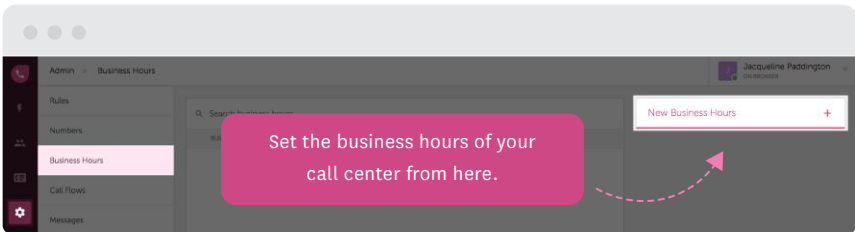
To add new business hours, click the '+' icon and give a name, choose a time zone and define the specifics like the days of the week and the start and end time for a day for your business.

Set the business hours for each day of the week using the New Schedule option.

Once you are done setting the business hours, click Add Business Hours button to save your changes.

All your saved business hours are listed here.
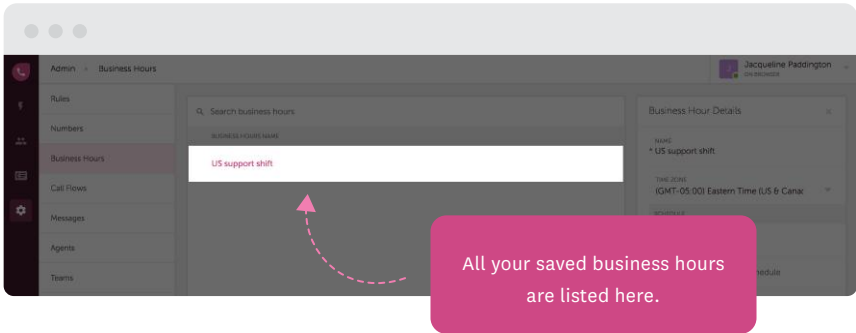
Note: By setting business hours for different teams and numbers, you can make sure that every call that comes outside these hours can be routed to your voicemail or another team that's available at that time of the day.

Managing messages

The moment a customer calls your business, you can choose the message that they'll be welcomed with, or the subsequent messages that'll guide them to connect with the right agent.

To customize your messages, go to **Admin Settings** > **Messages** > **New Message.**

Add more messages or edit the default ones from here.
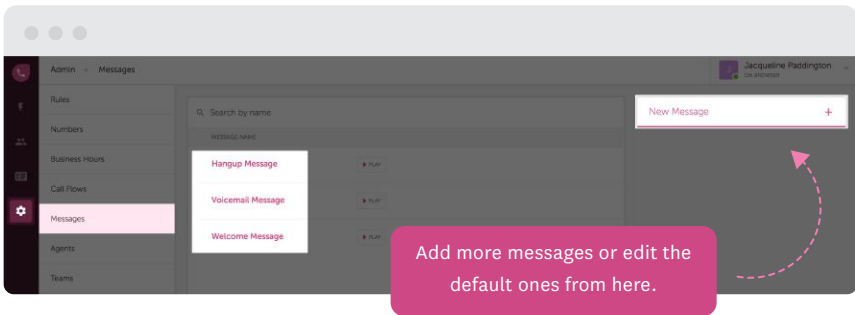
> **Note:** By default, you'll find hang-up, voicemail and welcome messages in your account. You can customize them according to your business needs.
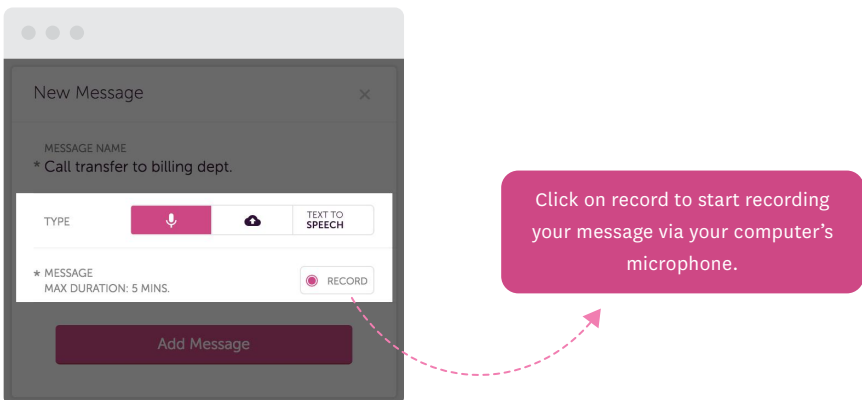
To add a new message click on the + icon present against the **New Message** button.
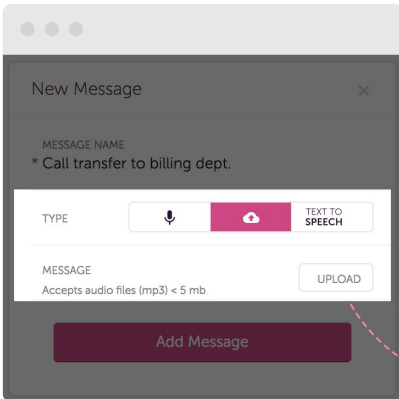

Choose the message to be added and also name the message.
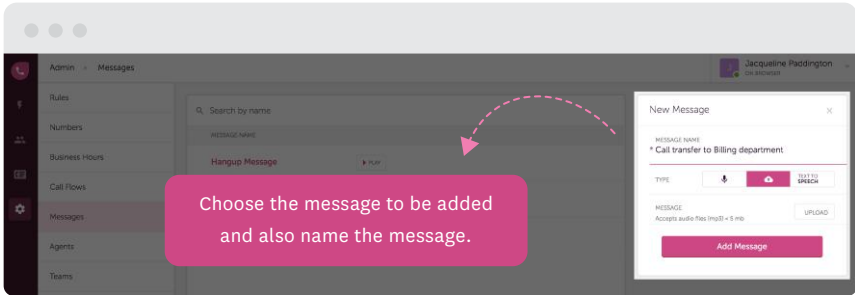
Type in the name of the message and add your message.

You can add your message in three ways:
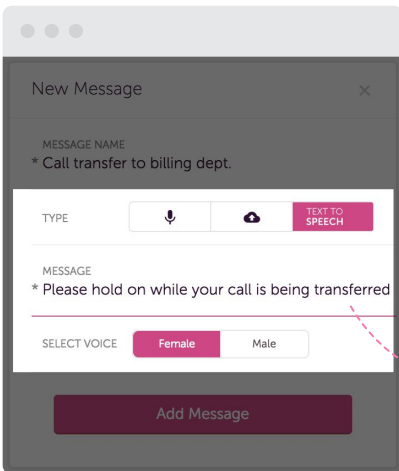
- Record a custom message (up to 5 minutes)

Click on record to start recording your message via your computer's microphone.

- Upload a pre-recorded message (mp3 file less than 5 MB)

New Message ✕

MESSAGE NAME
* Call transfer to billing dept.

TYPE | 🎤 | ☁ | TEXT TO SPEECH

MESSAGE
Accepts audio files (mp3) < 5 mb | UPLOAD

Add Message

Upload the audio file using this option.

- Convert your text message to speech (you can choose between a male or female voice)

New Message ✕

MESSAGE NAME
* Call transfer to billing dept.

TYPE | 🎤 | ☁ | TEXT TO SPEECH

MESSAGE
* Please hold on while your call is being transferred

SELECT VOICE | Female | Male

Add Message

Add the text to be converted to your audio message.

Save the new message by clicking the Add Message button. You can instantly play the message from the saved list.

Listen to individual messages from here.
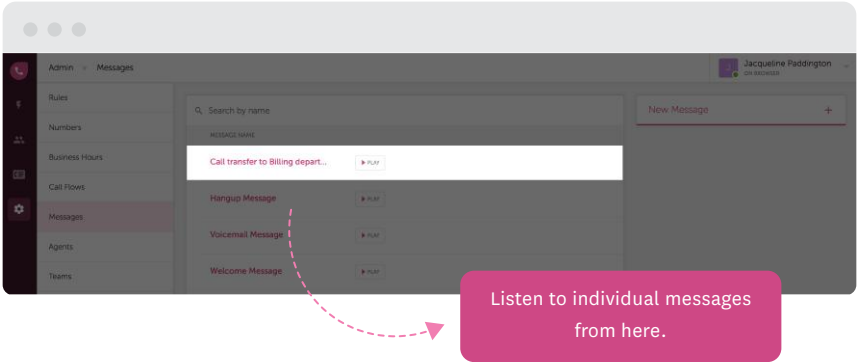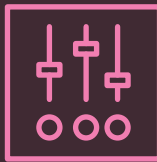
Setting up your call center operations

- Setting up call flows (Queues and IVR)
- Configuring rules

Call flows

Call flows are key to ensuring that your customers are attended to from the minute they make a call to you to the time they hang up.

You can put to use all the customizations you've made so far (teams, business hours, messages, etc.) to design foolproof call flows.

To set up a call flow, go to **Admin Settings** > **Call Flows** > **New Call Flow**

> **Note:** By default, a sample Global Queue is already created for you. You can either edit it or add new call flows as per your requirement.


Click this button to add a new call flow.
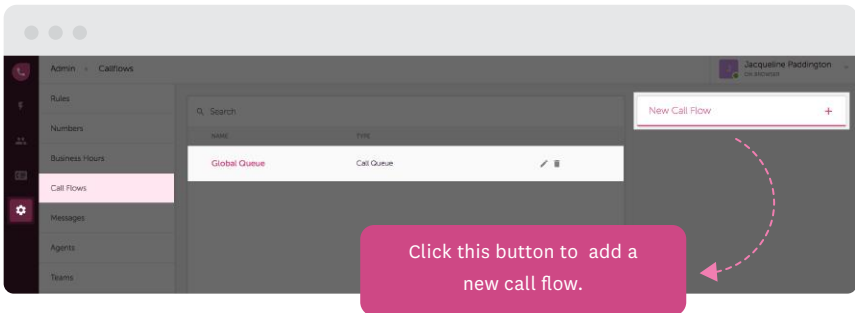
There are two important elements to setting up a call flow inside Freshcaller.

- Call queues

- IVR

Choose to configure an IVR menu or go for a call queue.
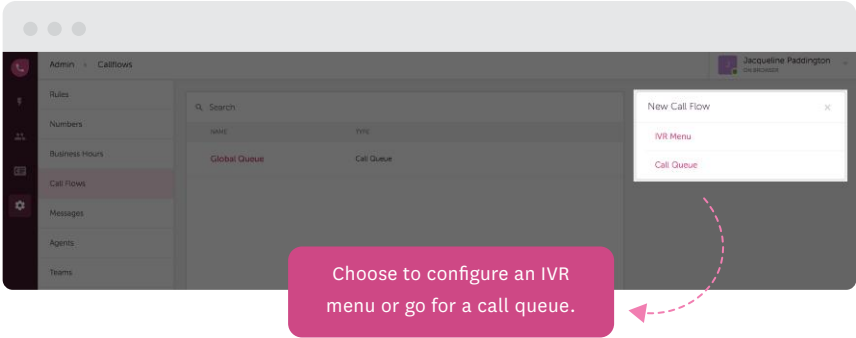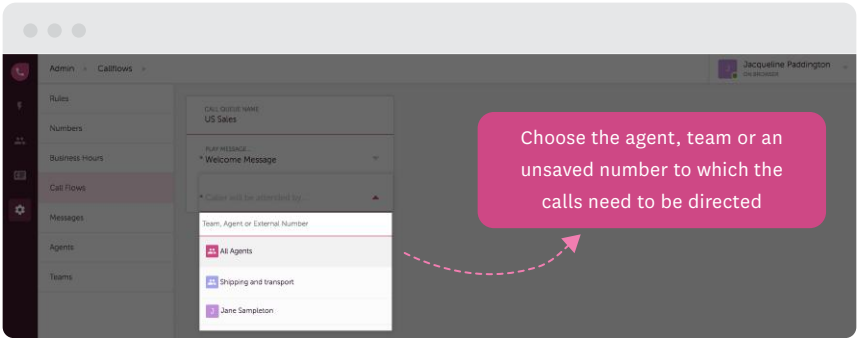
Call flows: Setting up call queues

Call queues are the routing rules for handling incoming calls. Use call queues to customize welcome messages, ringing rules, teams/agents handling the calls as well as call escalations.

Edit the name of the call queue from here.
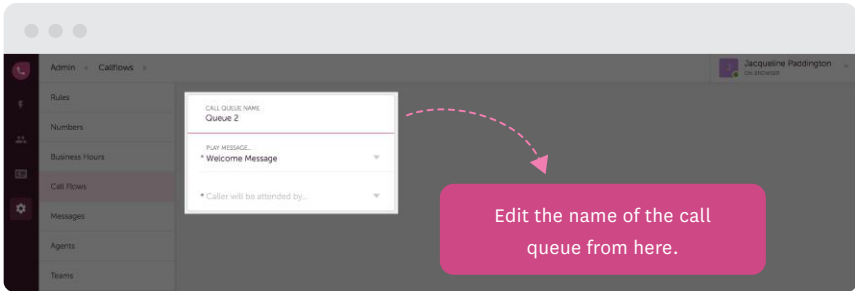
You can specify the name of your call queue, For e.g. US sales queue. Then choose the first message that the customer needs to hear. You can add a new message from here too.


Add a new message without switching to the message tab.
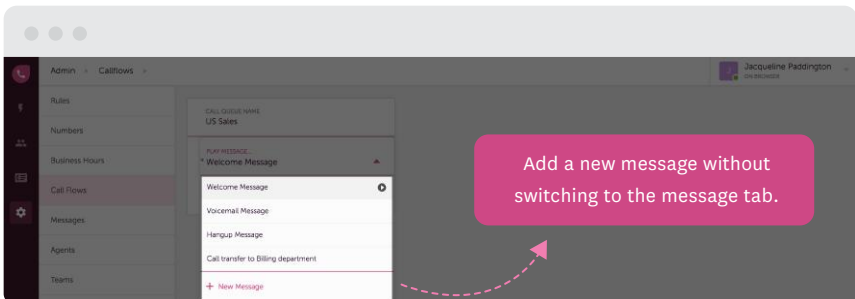
Now choose the team of agents who need to attend the calls in this queue.

Choose the agent, team or an unsaved number to which the calls need to be directed

Note: You can add an external number by typing it in the search bar.

Once you've defined both these fields, you can prioritize the routing based on the agent's availability.

Choose the agent(s) who need to receive the calls based on their availability.
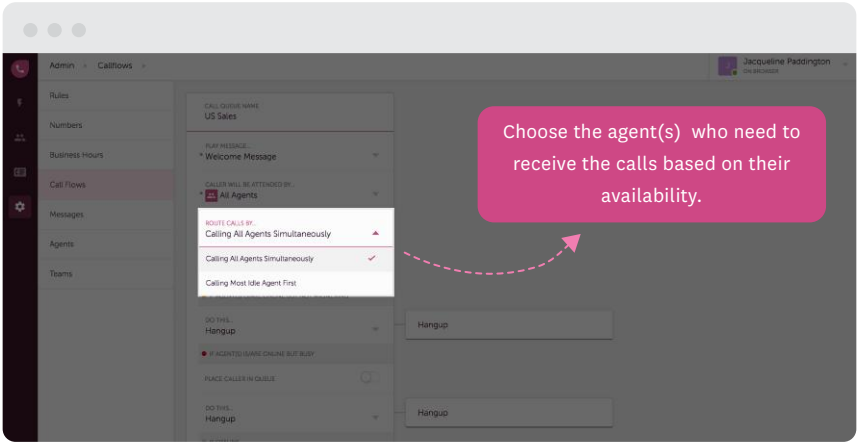
If the agent is busy, you can place callers in a queue of a desired size (typically <20).

Enable the toggle that says **Place Caller in Queue** (in case you don't want your callers to wait, you can keep this turned off).

Enable the toggle if you want to place your callers in queue when your agents are busy.
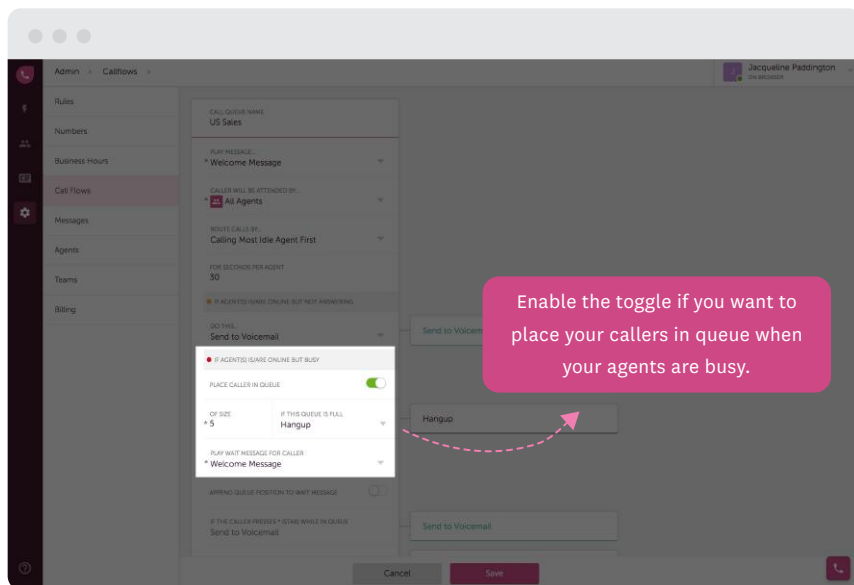
If the queue exceeds the maximum size you allow, you can route callers to voicemail, another call queue, or hang up.

Similarly, you can play a wait message while callers are waiting in queue. Choose a message to be played from your repository of messages in Freshcaller.
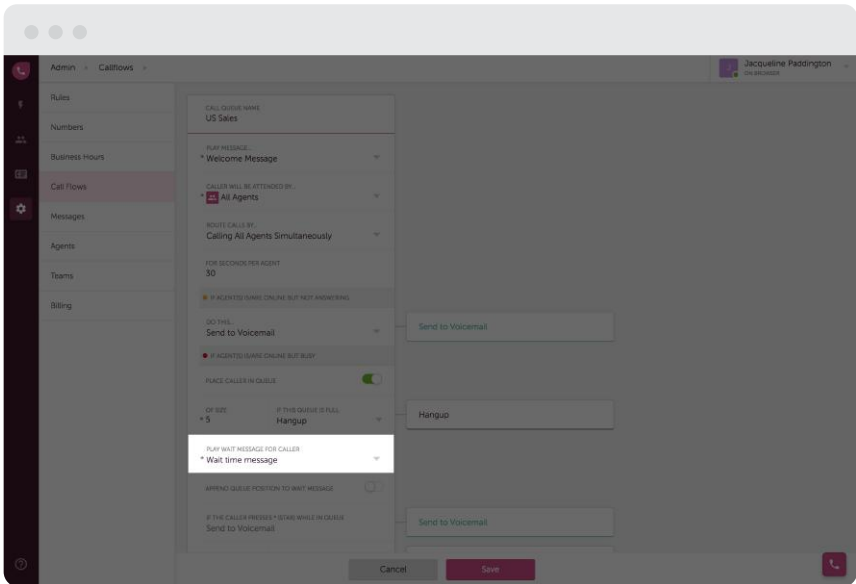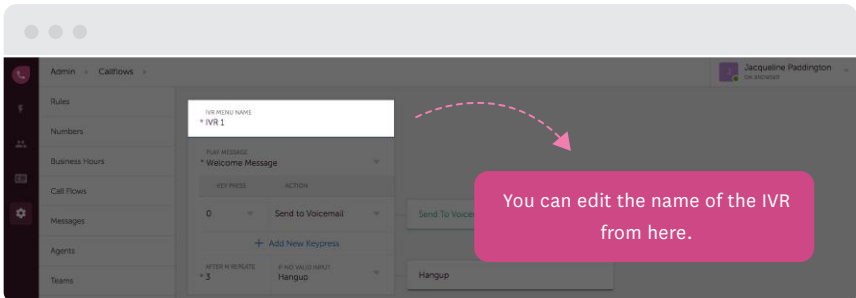

Once you've defined all the required fields, save the call queue.

Call flows: Setting up an IVR menu

Phone trees or IVR menus help you provide quick and seamless call resolution to your customers by routing their call to the most relevant team.
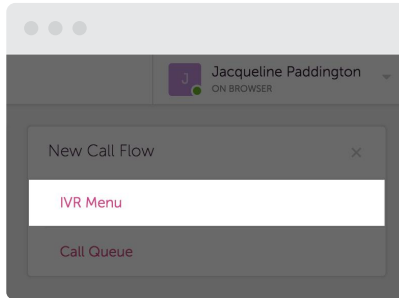
You can start with giving your IVR menu a name to easily identify it.

Then choose a message or add a new one with which your caller needs to be welcomed.

Add a new message without switching to the message screen.
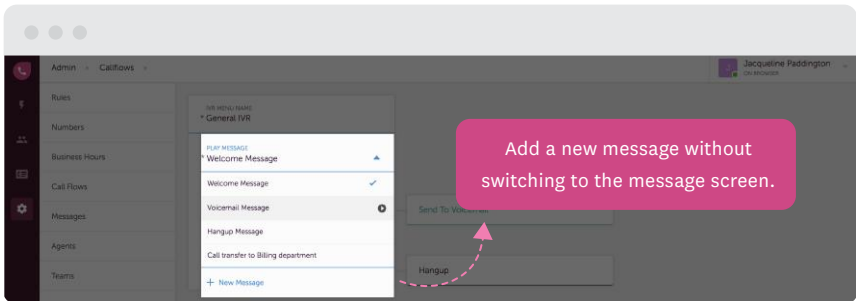
Now choose the keypress number and the corresponding action that needs to take place.

For e.g. Let's say, it's a simple IVR menu that asks the customer to pick between Sales and Support. To ask them to press 1 for Support and 2 for Sales, configure accordingly.

Choose a keypress number to pair with an action.
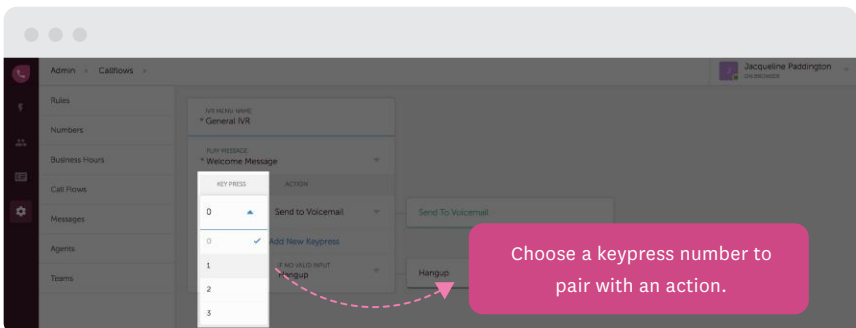
The various options available for a keypress are

- Routing to another IVR menu

- Connecting to a call queue

- Sending the call to voicemail

- Hanging up

For every keypress choose an appropriate action.
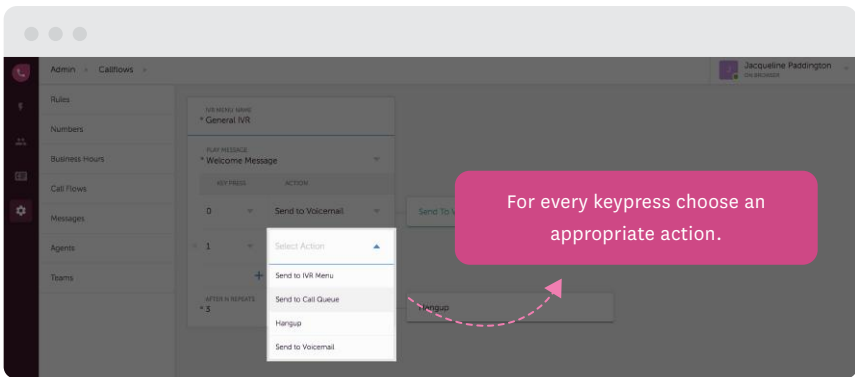
Let's say you are choosing to direct the call to a call queue if the caller presses 1. Then, the next step is to choose a call queue from the list of saved ones.

On pressing 1, the call is routed to the US support team.
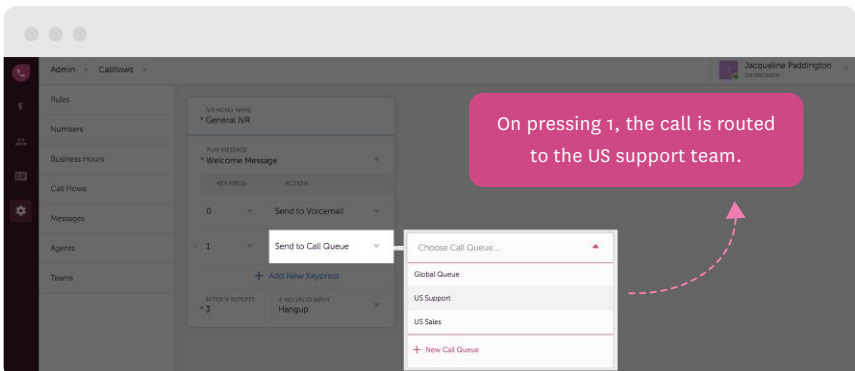
Finally, you can set the maximum number of times the IVR menu can be repeated for a given call and a suitable action in case of an invalid input from the caller.

Once the IVR menu is repeated the set number of times, you can choose to hang up the call.
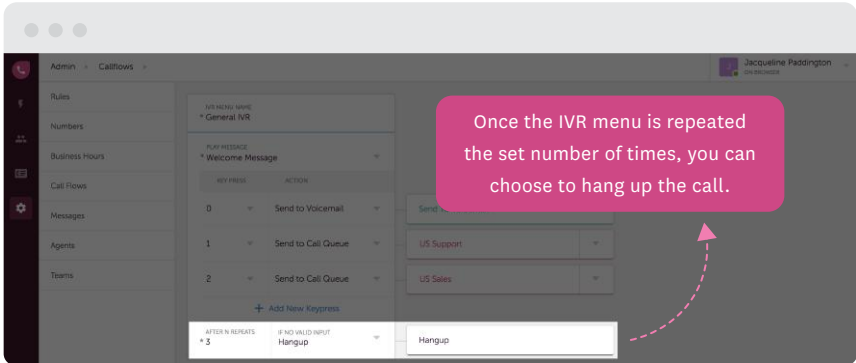
Configuring call center rules

To make sure all calls made to you are answered, every purchased phone number can be associated with a set of actions by defining the rules for that number.

To set a specific rule for a number, go to **Admin Settings** > **Rules** > **New Rule.**

Use this button to associate a rule to a phone number.
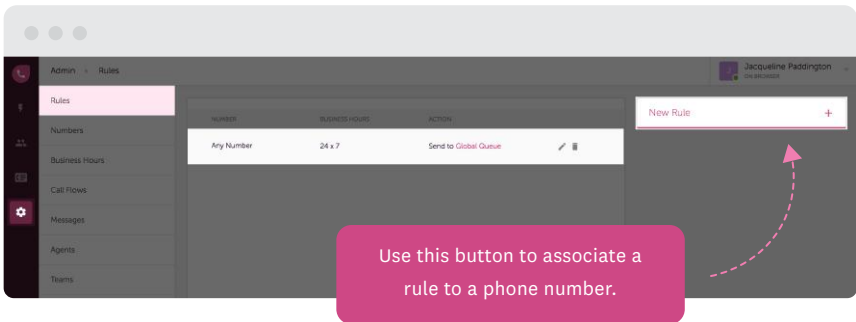
Note: By default, a rule that associates a number to the Global queue is available. You can edit the rule using the **Edit** option and add the number of your choice to this rule or add a new rule entirely.

On clicking the **New Rule button**, a section asking for the phone number, the business hours associated to the number and the action that needs to follow for every call made to the number comes up.
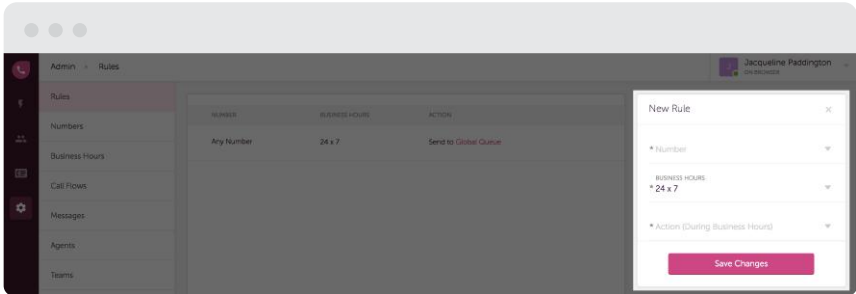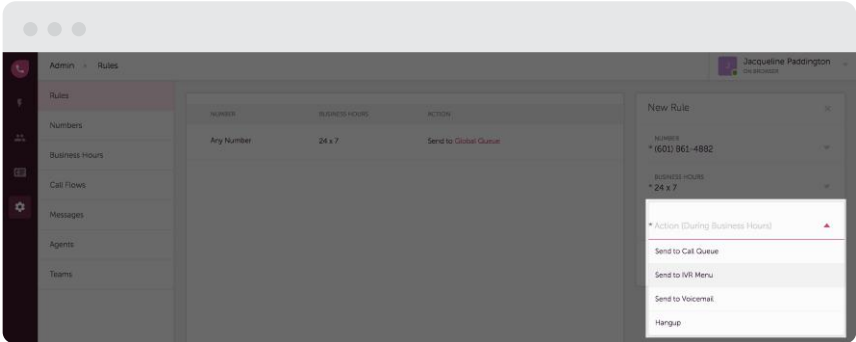

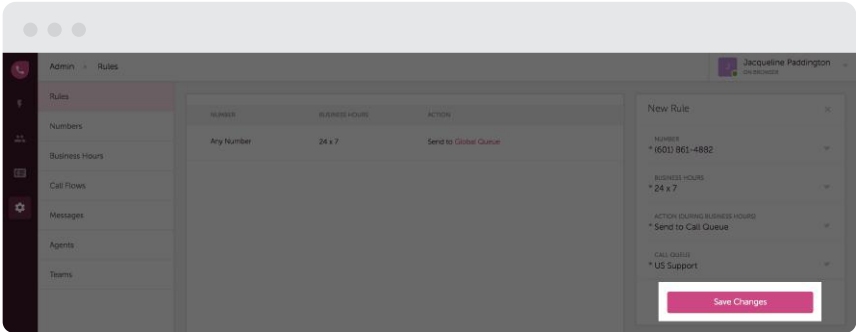The actions available to you are:

- Send the caller to a call queue

- Present an IVR menu

- Send the call to voicemail

- Hang up
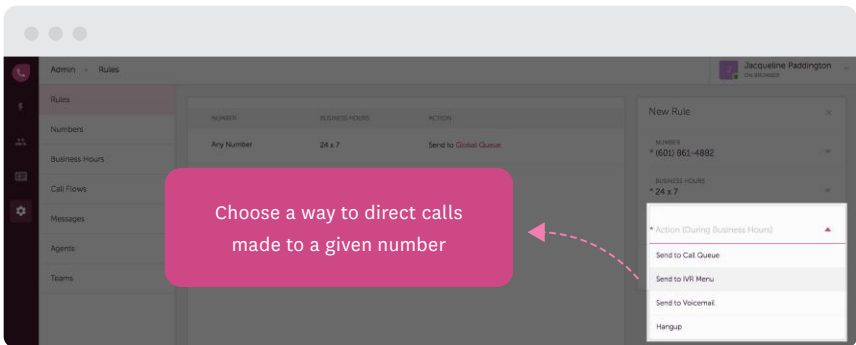
Choose the desired action. For e.g. if you want the call to go to a call queue, choose from the list of saved queues or add a new one right there.

Finally, save the changes and start using the number.


Click on this button to save the new rule.

# Monitoring agents & calls through Live Dashboard

The Live Dashboard in Freshcaller gives you a real-time overview of your whole call center in a single glance. It shows you the following details:

- **In Queue:** Visibility into call queues

- **In Conversation:** Ongoing conversations between agents and customers

- **Agents:** Agent availability status and their last activity information

It also shows you the count of all calls, missed calls and voicemails for the selected duration.
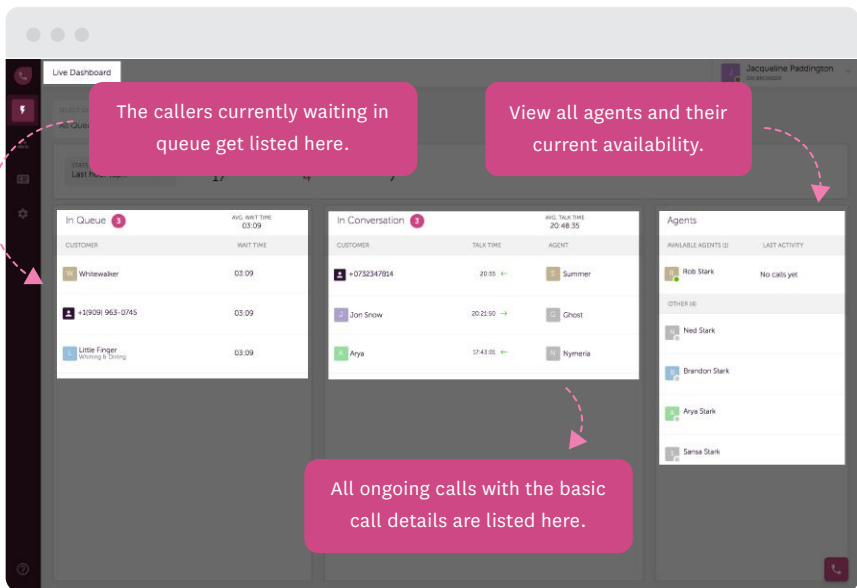
Once you click the Live Dashboard icon on the sidebar, you can choose to monitor a specific queue or all queues from the **Select Queues** drop-down.

Choose the specific queue that you want to monitor using this dropdown.
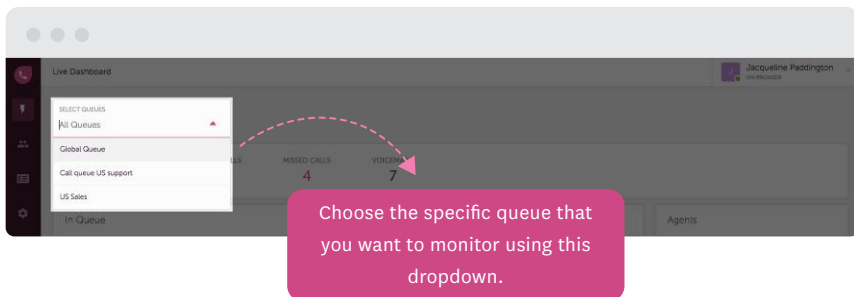
Use the Stats dropdown to choose if you want the dashboard to view the total calls, missed calls and voicemails for the current day or the only previous hour.

You can either choose to see the call count for the entire day or the previous hour from here.
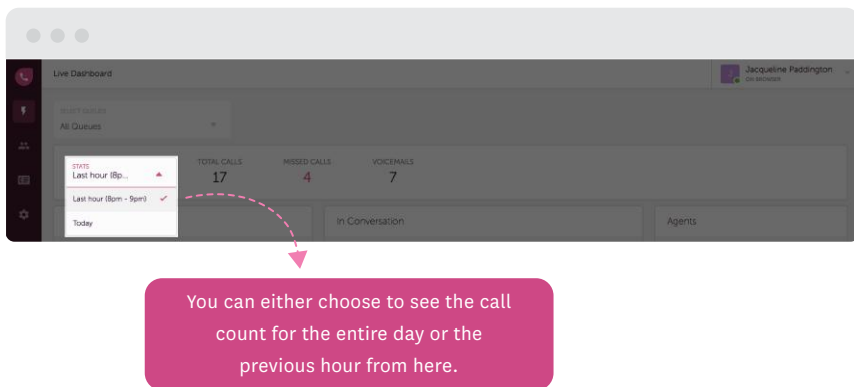
These are the basic set of configurations that are available to you as an Admin.

Once you configure your call center you can make the best use of Freshcaller capabilities and help your team of call center agents work with ease.

We are always around to help you with any further questions about Freshcaller. Do send your queries to support@freshcaller.com.

LOG IN TO FRESHCALLER

freshcaller

Write to us:

support@freshcaller.com