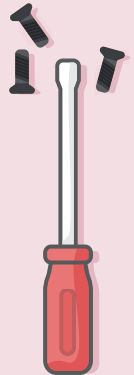
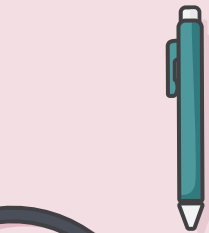




Getting started with Freshcaller in Freshdesk

An agent's guide





CONTENTS

1.	Getting Started	02
2.	Understanding the Freshcaller Widget	05
3.	Making or Receiving Calls	09
4.	Basic Functions in the Freshcaller Widget	15
5.	Converting your Calls to Tickets	24
6.	Exploring the Freshcaller Interface	28
7.	Accessing Integrated Marketplace Apps	41



Freshcaller is a modern-day reimagining of our everyday phone system for customer support teams. With its cloud-based architecture, Freshcaller brings together the best of legacy features like IVR and advanced capabilities like Smart Escalations to help you provide excellent customer experience.

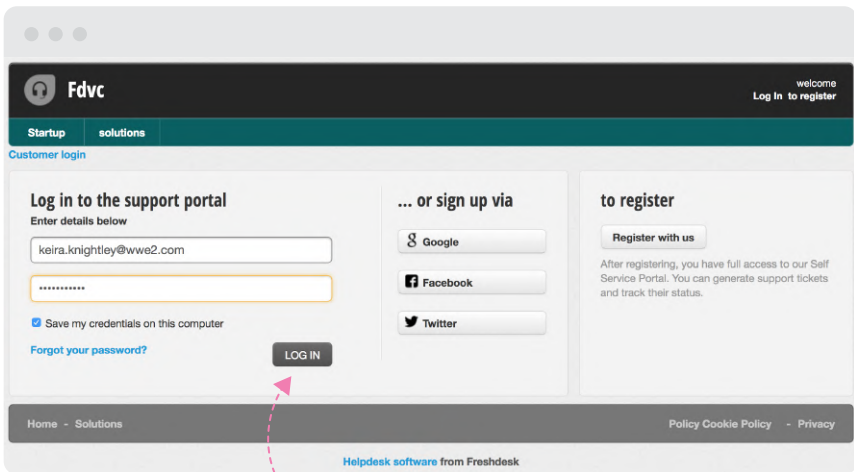
- ✓ Simple and quick to onboard
- ✓ Easily customizable
- ✓ Intuitive call center metrics
- ✓ Real-time call center insights
- ✓ Contextual conversations

Getting Started

As a Freshdesk agent, you can easily access the Freshcaller widget from within your Freshdesk account.

#1 Log In

Once your manager adds you as a Freshcaller agent to the Freshdesk account, you can start using Freshcaller to make and receive calls. Log in to your Freshdesk account using the Freshdesk email address and password.



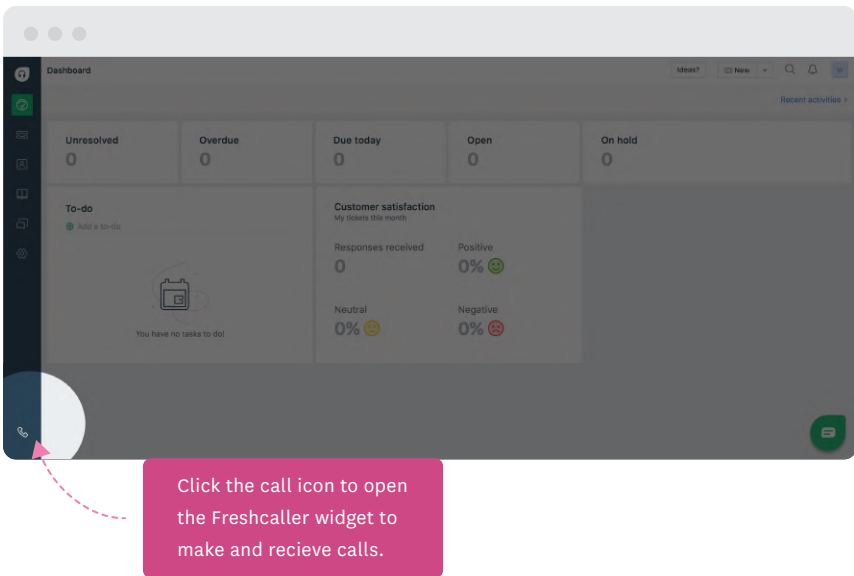
Click here to login

You can use your Freshdesk login credentials to log in to both your Freshcaller and Freshdesk accounts.

#2 Click on the call icon

A successful login takes you to your Freshdesk account.

Go to the bottom left corner of your screen and click on the Freshcaller call icon.



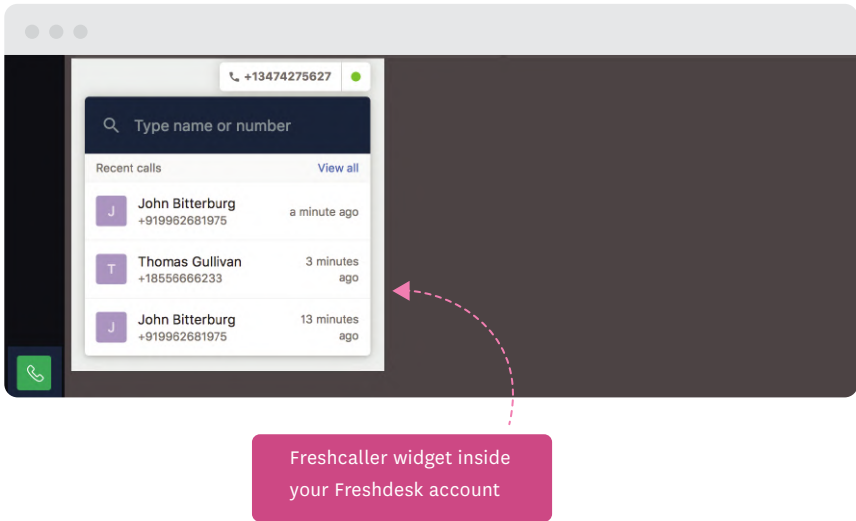
From now, you can manage all your calls from here.

Understanding The Freshcaller Widget

The Freshcaller widget provides all the required options that help you make/receive call without leaving your freshdesk account.

#3 Know your Freshcaller widget

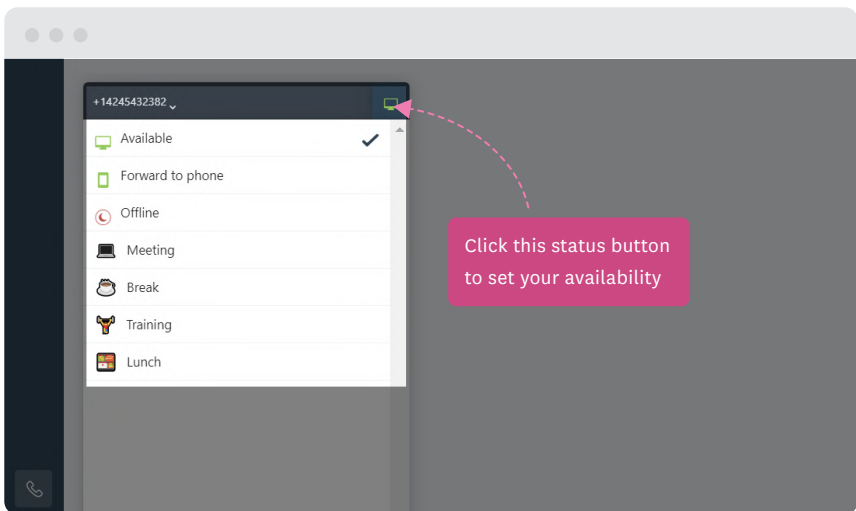
When you click on the call icon, the widget expands to show you the recent calls, your current number in use and other functionalities.



With this widget, you can now handle calls without having to move to a new tab.

#4 Set your availability

Sometimes, when you travel or have other emergencies, you may be unavailable to take calls. In such situations, you can set your most convenient availability status. This helps in routing calls to other available agents.



You can see your current status on the top-right corner of the widget. To change your status, click on the status icon and select the required status. You can also choose to forward the calls to your mobile phone.

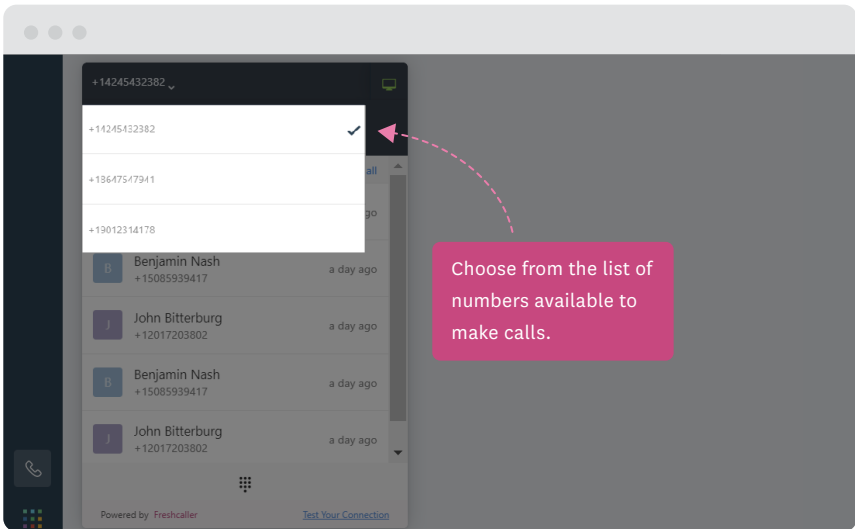


To update your mobile number, click on your profile picture and go to your profile settings.

#5 Choose your phone number

You can choose a preferred number from the list of Freshcaller numbers available to you.

- The phone number displayed on the top left corner of the widget indicates the current number in use
- To change the number, click on the arrow and select the preferred number from the list



These numbers are added to your account by your Admin. If you want to use a different number, contact your admin.

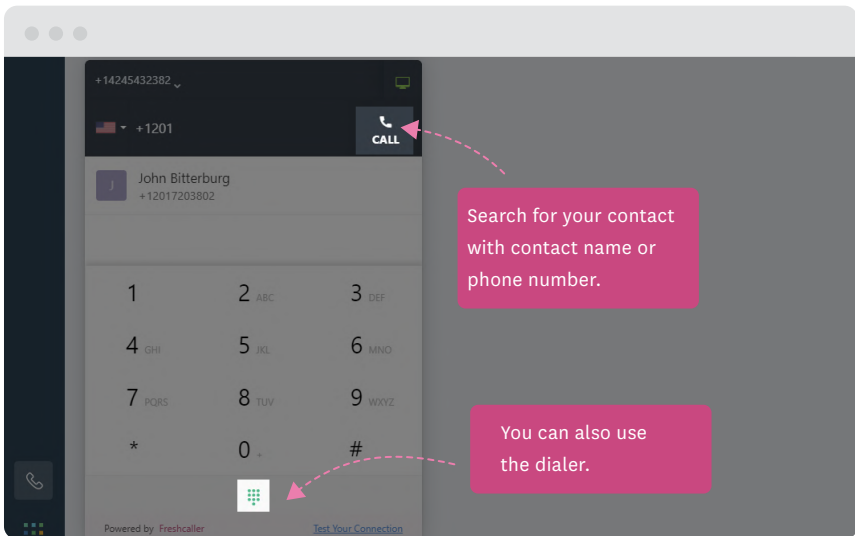
Making/Receiving Calls

Before you make the first call, test your connection and make sure to grant access to your browser to use your computer's microphone.

#1 Search for a contact

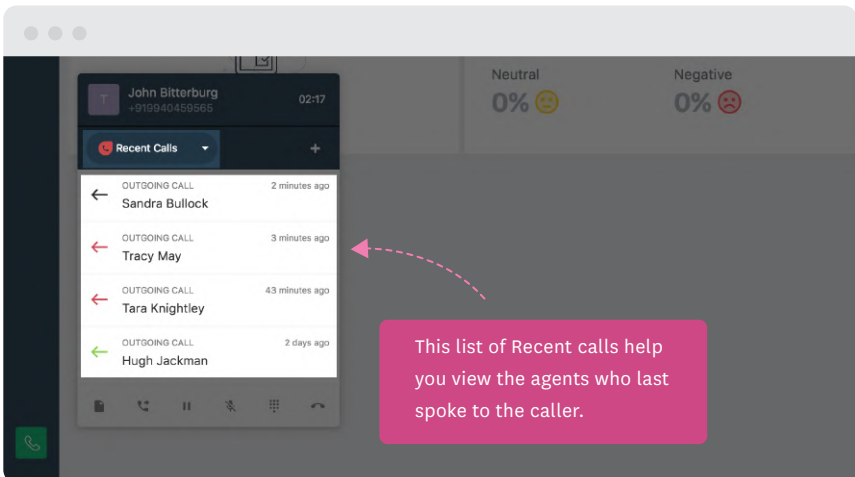
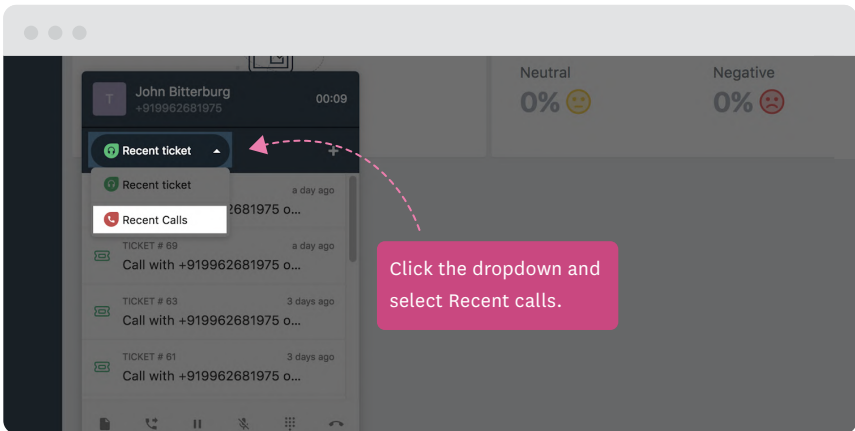
You can search for a contact in two ways:

- **Search bar:** Enter the contact name or phone number in the search bar. If you search for a saved contact, the name gets listed automatically.
- **Dialer:** Click on the dialer available at the bottom of the widget and enter the number you want to search.



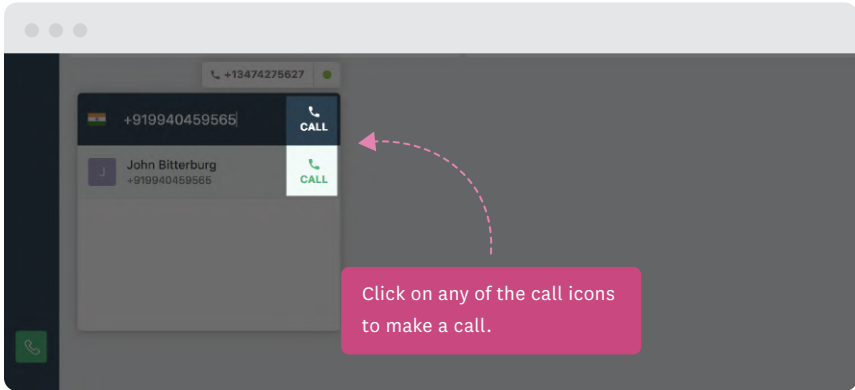
#2 View your recent calls

The **Recent calls** section displays the list of recent calls made. This can also include the missed calls. To redial a number, hover over the number and click on the call icon visible next to the number.

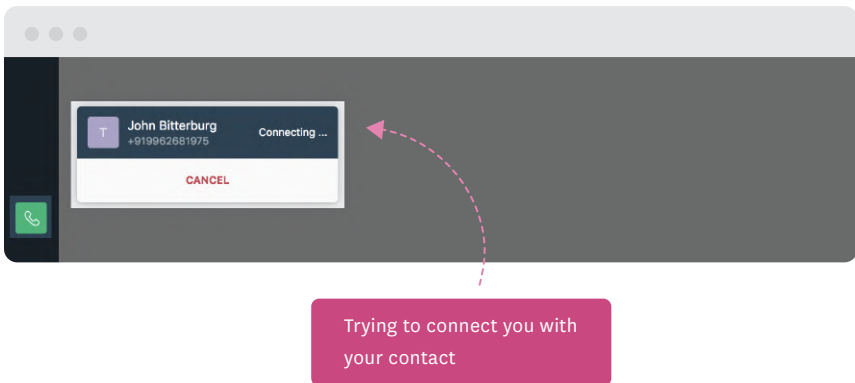


#3 Make a call

To dial a number, you can either use the call icon present in the search bar or the search result.

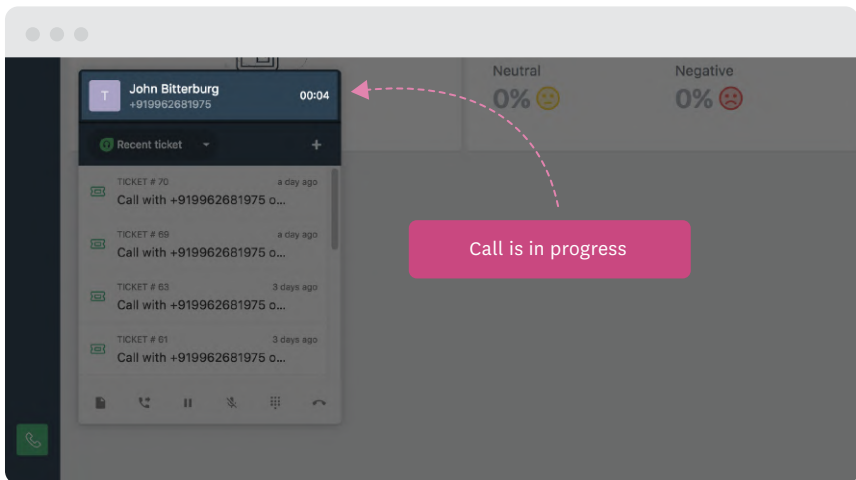


You can see the status of your call connection in the widget.



Once the customer attends the call, the widget expands and you can see the duration of the call at the top of the widget.

The live timer indicates that your call is in progress.

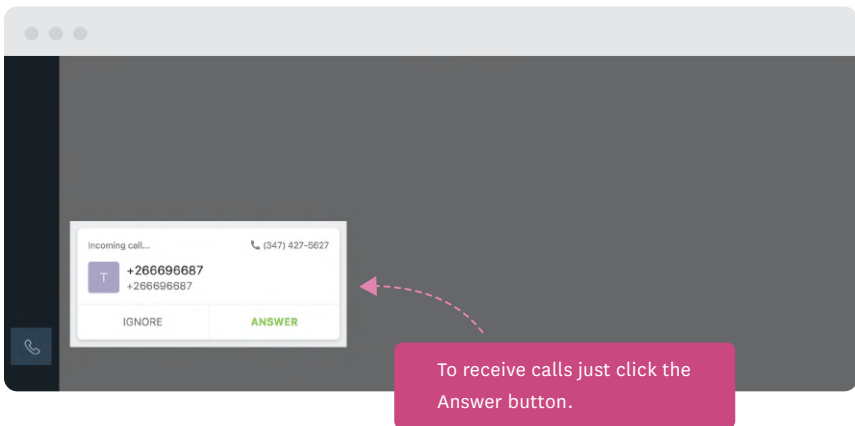


#4 Receive a call

When you receive a call, the widget opens up with the name of the contact (if saved) and the number.

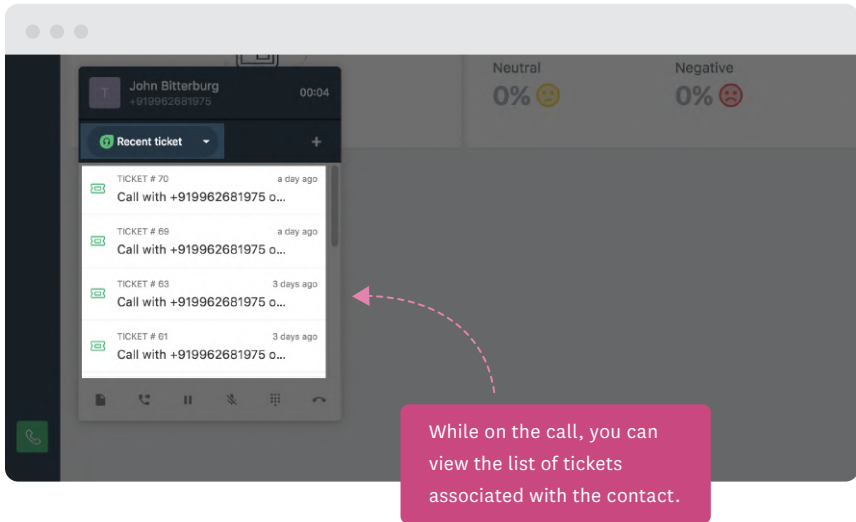
To answer the call, click **Answer**. Click **Ignore** to decline the call.

All declined calls will be routed according to the call flows that your manager has set up.



#5 View recent tickets

Once you answer the call, use the Recent ticket option to update yourself with details related to the caller like the previous tickets and the queries.

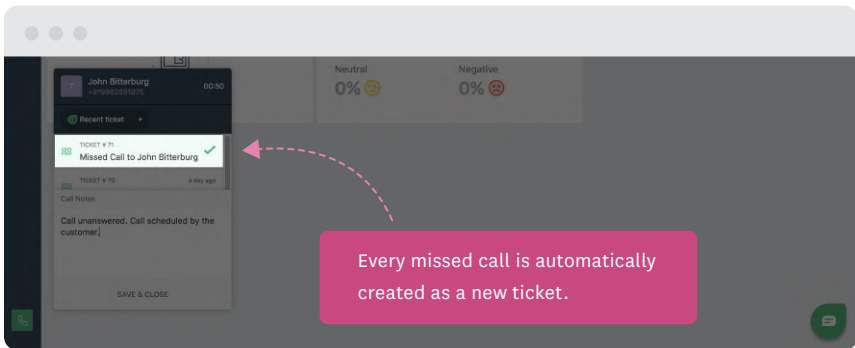




#6 View missed calls

Each missed call or a voicemail is automatically created as a new ticket in your Freshdesk account.

This helps you reduce the instance of missing out on calls. You can easily return the call or respond to the voicemail once you are active to make calls.



Basic Functions in Freshcaller Widget

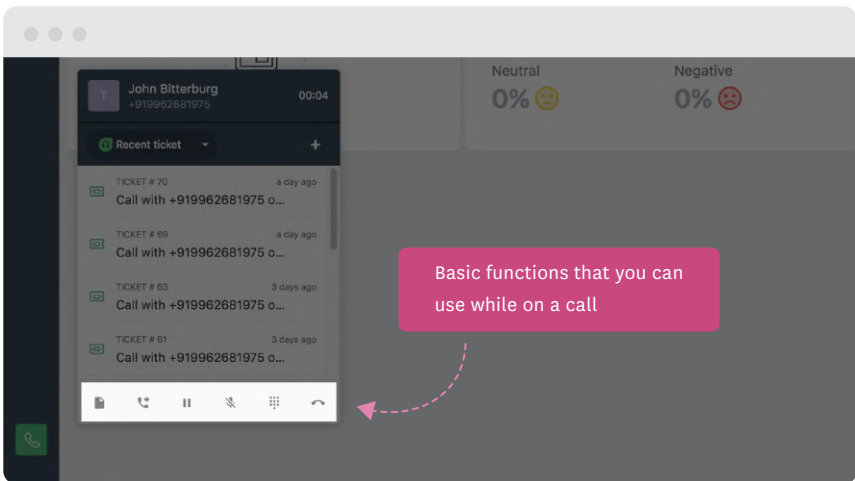
The Freshcaller widget provides various options that help you have an effective and productive on-call experience.

#1 Use basic on-call functions

The Freshcaller widget provides basic functions and options that you can use within your Freshdesk account, which you can use during an ongoing call.

The options are:

- Transferring calls to other agents or external number
- Placing the call on hold
- Muting/unmuting your microphone
- Taking call notes

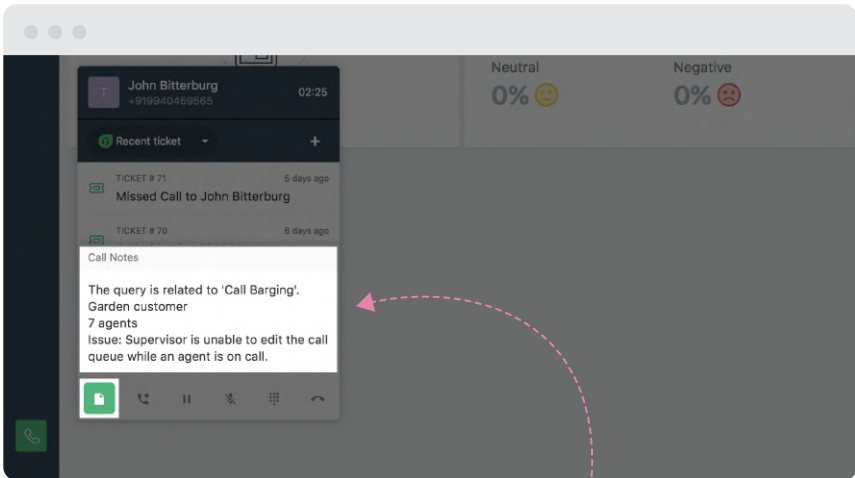


#2 Add call notes

Call notes help you record the summary and highlights of a call. With notes, you can set a clear context of the call.

You can use call notes:

- For your own reference
- As a reference for other agents when you transfer the call

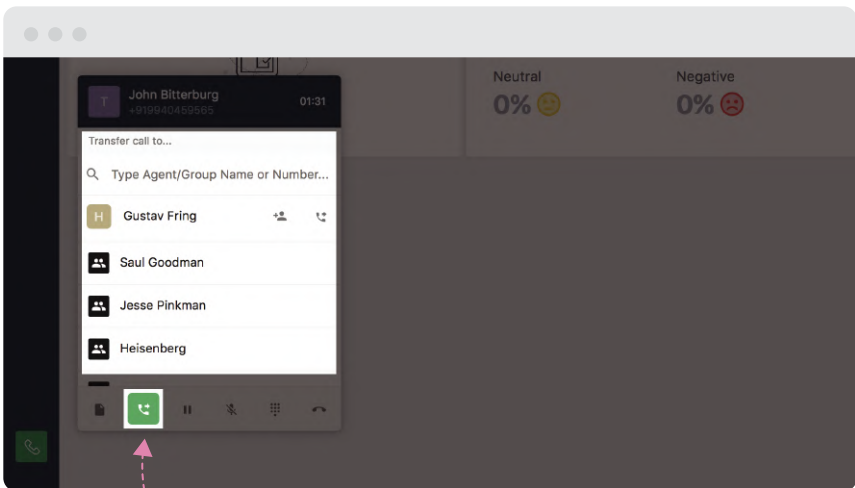


Click on this icon to add your notes. You can refer to the notes later from your call logs.

#3 Transfer calls to agents/teams

During an ongoing call, you may sometimes feel that another agent in your team can answer your customer queries better or the customer may want to talk to a specific agent.

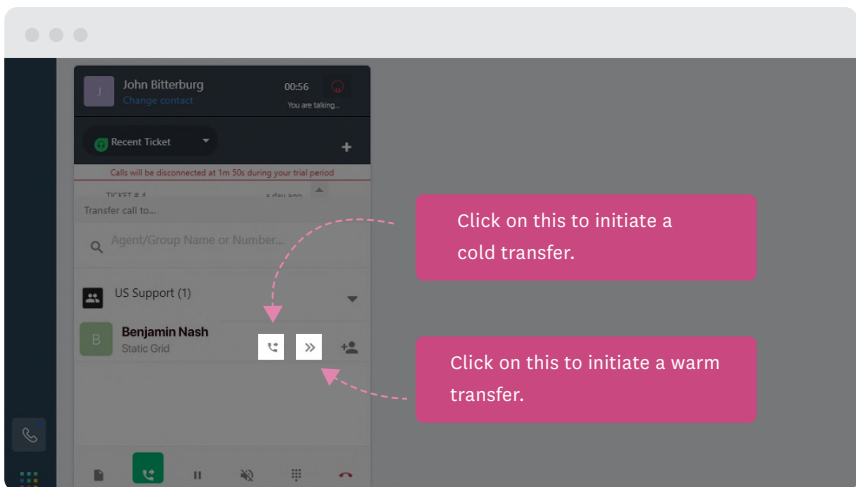
In such scenarios, you can transfer the call to any specific agent, an entire team, supervisor, or to an external number.




Click on this to see the list of available agents to transfer calls.

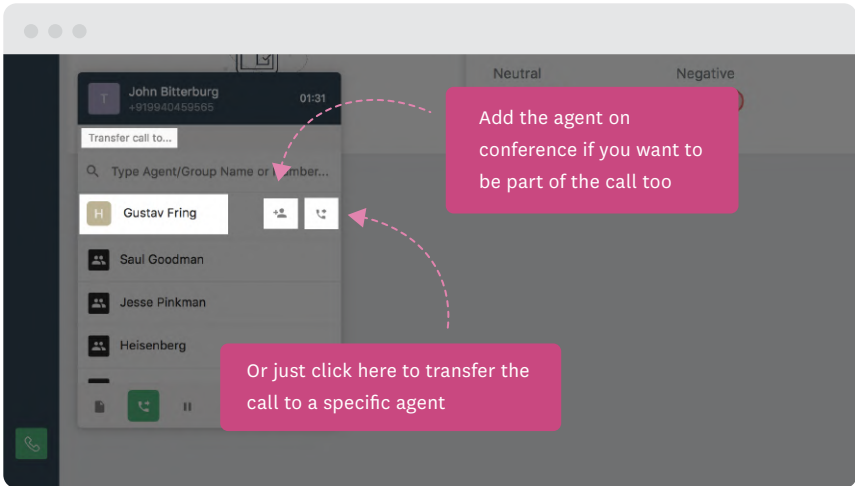
You can initiate two types of transfer calls:

- **Warm Transfer:** Use this to have a quick discussion with another agent before transferring the call. You can provide all the necessary details and continue to stay or disconnect once the call is transferred.
- **Cold Transfer:** Transfers the call to another agent immediately. Unlike warm transfer, you cannot have any brief conversation before transferring the call.

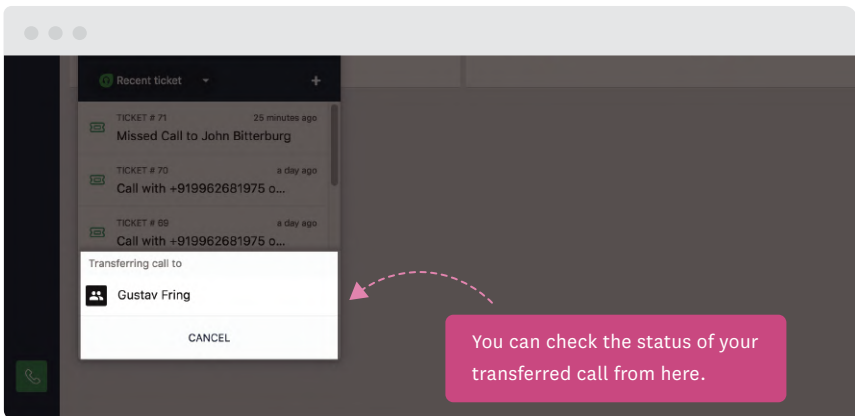


 A warm transfer can be initiated only to individual agents within a team. Click on the arrow next to the team name and then select the agent.

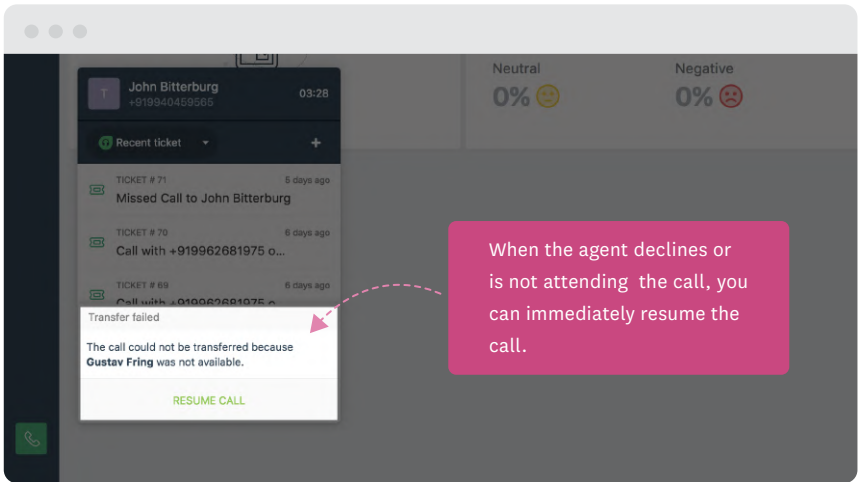
In addition to transferring calls, you can initiate a conference call by adding another agent to your ongoing call.



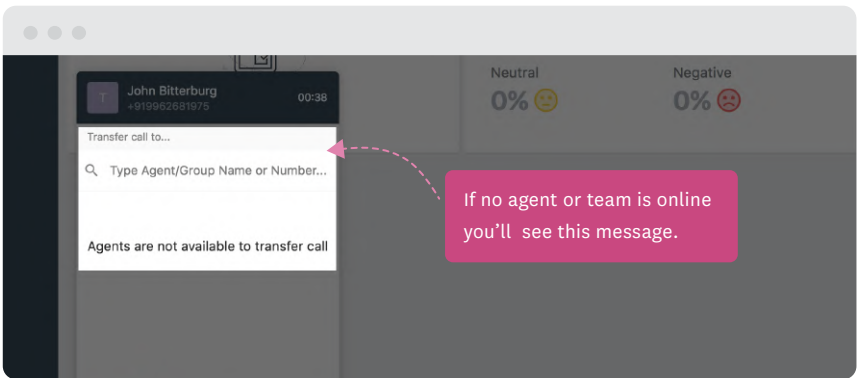
Also, you can get to know if your transferred/conference call was picked up or not.



If the other agent declines or does not attend the call, you can resume the call and try to transfer it to another agent.



You will also be notified if no agent is online to attend the transferred call.



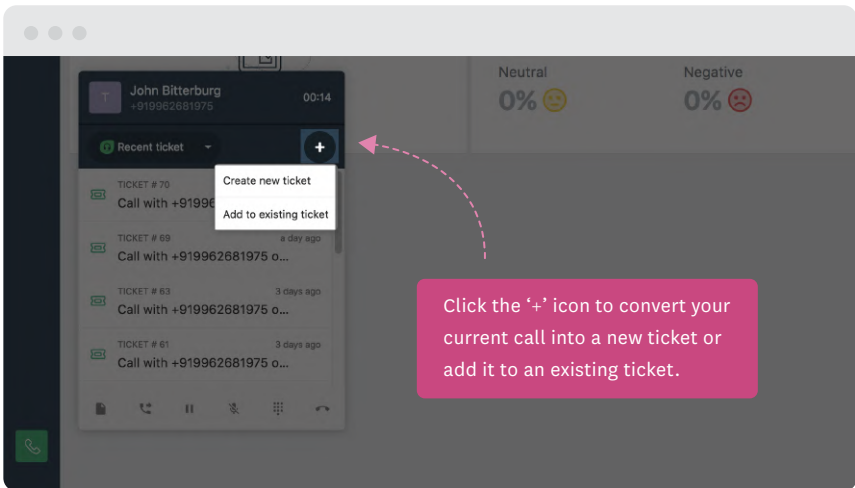
Converting your calls to tickets

You can now instantly convert your calls to freshdesk tickets from
within the Freshcaller widget.

#1 Convert calls to Freshdesk tickets

In addition to viewing the recent tickets and calls, you can also convert your current call into a new ticket or add it to an existing ticket.

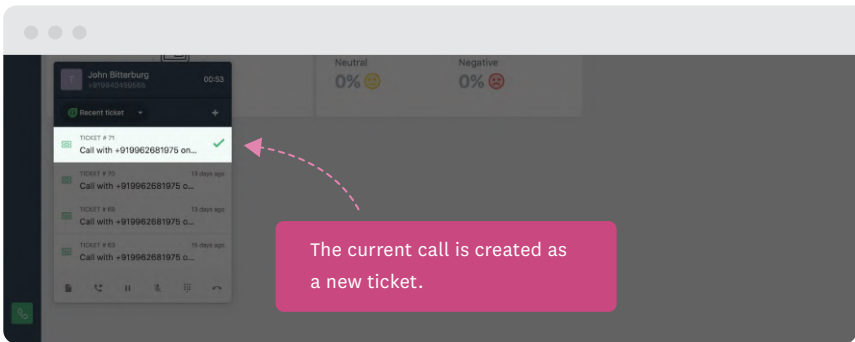
This will come in handy for a prompt follow up and keeping a collated record of your customer's journey.



#2 Create a new ticket

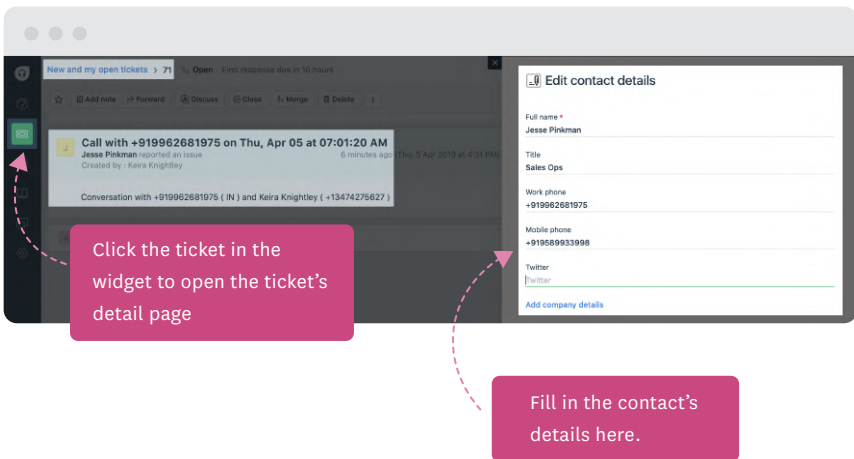
You can see the new ticket created under the **Recent tickets** view.

A green tick indicates a successful creation of a ticket.



You can click on the newly created ticket and modify the fields based on the caller's needs. You can do all this in real-time.

- Once you click the ticket in the widget, the ticket's details page opens up.
- You can also edit the contact's details, add notes, or other ticket details from here.



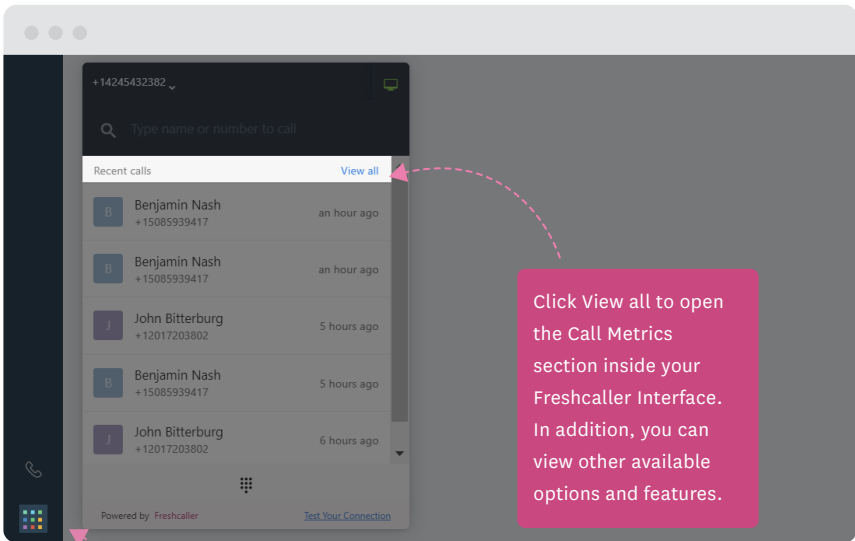
Exploring the Freshcaller Interface

This section provides information about the various options you can explore inside the Freshcaller interface.

#1 Access the Freshcaller interface

You can access the Freshcaller interface in two ways:

- Using the **View all** option under **Recent Calls**
- Using the the **Freshworks switcher icon**



Click View all to open the Call Metrics section inside your Freshcaller Interface. In addition, you can view other available options and features.

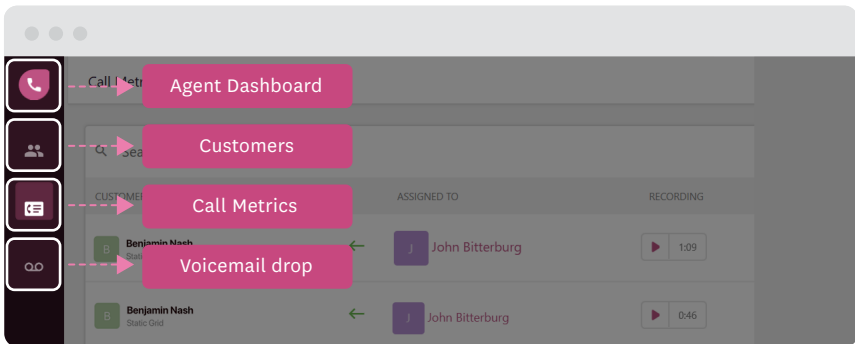
Click the switcher and select your Freshcaller account.

#2 View advanced features in Freshcaller

The Freshcaller interface provides access to advanced features and options that are not available within the Freshdesk widget.

The options/features are:

- **Agent Dashboard:** Monitor your daily and monthly performance
- **Customer:** Import and add customers
- **Call Metrics:** View the complete list of call logs in your account
- **Voicemail drop:** Create custom voicemail messages that can be used during outgoing calls



#3 View agent dashboard

The agent dashboard provides visibility into the number of calls you attended on a daily/monthly basis. Here, you can see:

- The total number of incoming/outgoing calls made to your number
- Number of incoming/outgoing missed calls
- Number of incoming/outgoing transferred calls
- Number of incoming/outgoing answered calls

The screenshot shows an agent dashboard with the following sections:

- Home** (top right)
- Request Demo** (top right)
- My performance** (top left)
- Incoming Calls**
 - Total calls: 47
 - Answered call: 3
 - Missed Calls: 18
- Outgoing Calls**
 - Total calls: 113
 - Answered call: 63
 - Missed Calls: 50
 - Transferred Calls: 12
- My recent calls** (bottom section)

Annotations on the dashboard:

- Click on the home button. (points to the home icon in the sidebar)
- Click on the drop-down to switch to monthly view. (points to the 'Today' dropdown menu)
- Check your daily/monthly performance. (points to the 'Today' dropdown menu)
- See details such as customer name, call recording, and call timestamp. (points to the call history table)

CUSTOMER	RECORDING	CALL TIME
Freshcaller Sales Freshworks	04:11	30 seconds ago
+19179603743	10:50	2 minutes ago

Use this as a self-evaluation tool and keep a tab on your performance.



#4 View call metrics

Each call you attend provides multiple opportunities to understand and improve your business. It can be a potential lead to upsell, or may help you understand the most pressing issue in your product.

Freshcaller call logs help you get all this from a single screen.

The screenshot shows the 'Call Metrics' interface with a table of call logs. The table has columns for Customer, Assigned To, Recording, Numbers, Call Tags, Billing/Duration, and Call Time. Call types are indicated by icons: incoming (green circle with arrow), outgoing (red circle with arrow), missed (red circle with slash), and voicemail (purple circle with 'v').

CUSTOMER	ASSIGNED TO	RECORDING	NUMBERS	CALL TAGS	BILL/DURATION	CALL TIME
Freshcaller Sales Freshworks	Munawar Ahmed	▶ 04:11	Test +1-537-491-4754	#ProductSales	00:32	30 seconds ago
+19179503743	Munawar Ahmed	▶ 10:50	MFD Test +1-773-945-4188	#ProductSales x3	00:54	a minute ago
Acklaide Harmon Revel Dutch Shell	Munawar Ahmed	...	Jack's Team +1-220-216-7121	#Callback x1	00:15	43 minutes ago
Marian Garner Statoil	Munawar Ahmed	▶ 09:08	+1-528-711-9672	#ProductSales x3	00:52	50 minutes ago
Erik Huzhes Lilaw	Terry Sims	...	+1-016-090-9090	#Promotion x2	00:32	1 hour ago
Freshcaller Sales Freshworks	Umber Jones	▶ 06:12	Sales number +1-507-352-0938	...	00:32	2 hours ago
Maria Scott Lilaw	Munawar Ahmed	▶ 02:02	+1-239-936-0987	#Sales	00:32	Yesterday

Click to view details of child calls (transferred or callback)

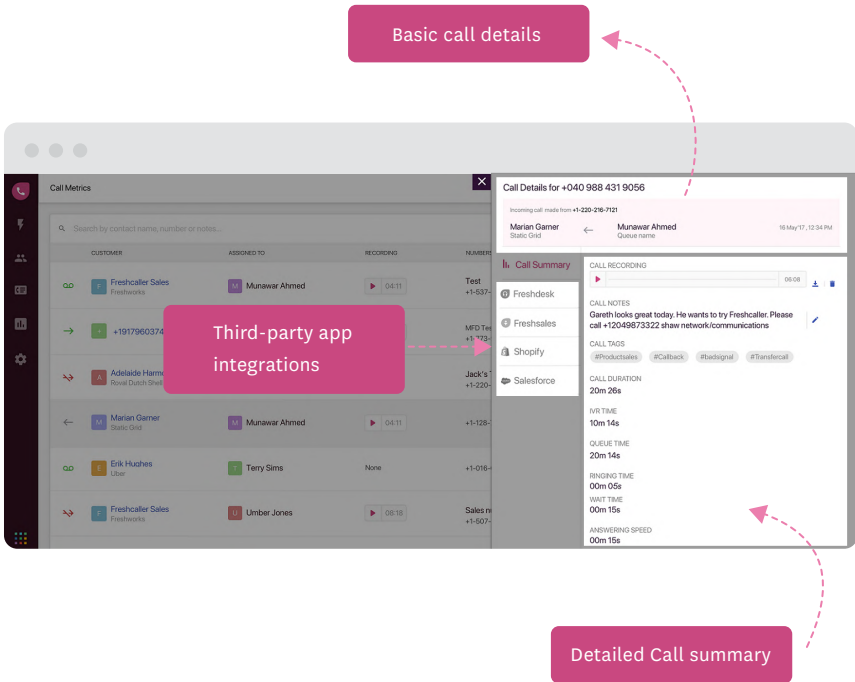
Call type: incoming, outgoing, missed or voicemail

Call recording

Indicate that the call has associated call notes, voicemail transcripts, or third-party integration details

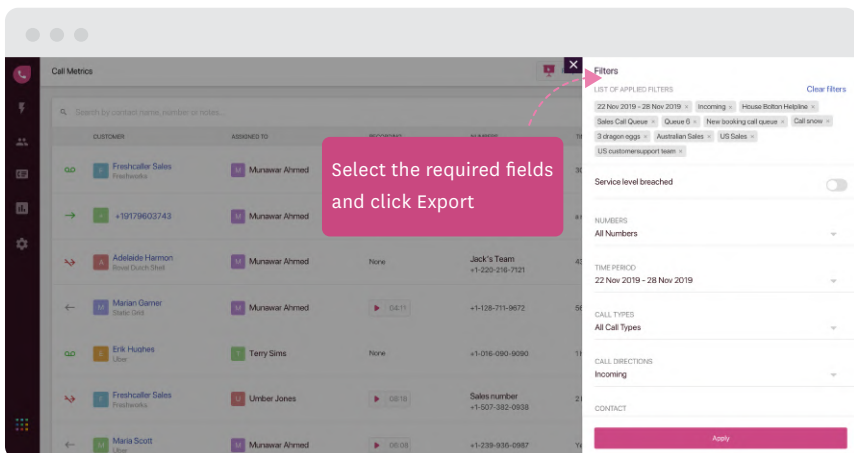
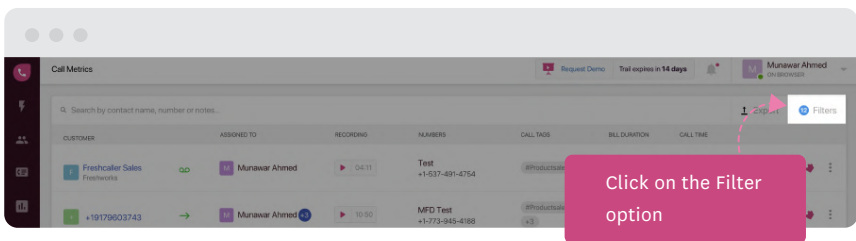
Tap anywhere on the call metrics table to open the call details section. Here you can see:

- **Basic call details:** Caller's name, call type (inbound or outbound), call timestamp, agent's name, and the call timestamp
- **Call Summary:** Gives you the complete summary of a call record
- **App integrations:** Details about the integrated apps

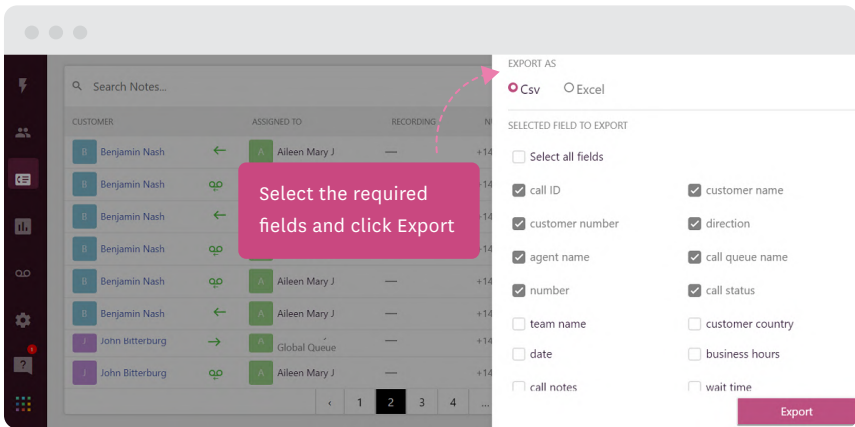
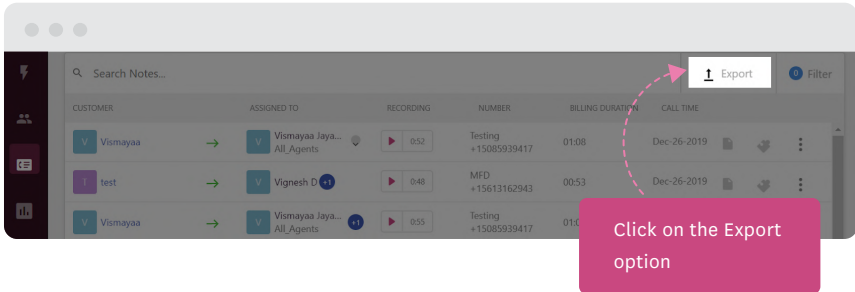


When you have a huge list of call records in your account, finding the right data can sometimes be challenging and overwhelming.

The filter options in the Call Metrics section lets you narrow down your search results. For example, to see all the incoming calls on a particular day, you can use the Time Period and Call Direction filters.



You can also select and export call metrics in CSV or Excel formats.

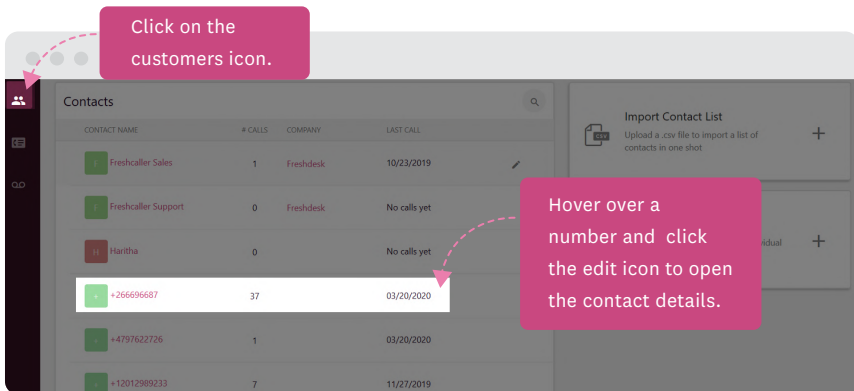


#5 View/import customer

Use this tab to save the contact details of customers. Here, you can see the list of recently dialed or received calls in your account.

You can also do the following:

- Create a new contact
- Bulk import the list of contacts in a CSV file

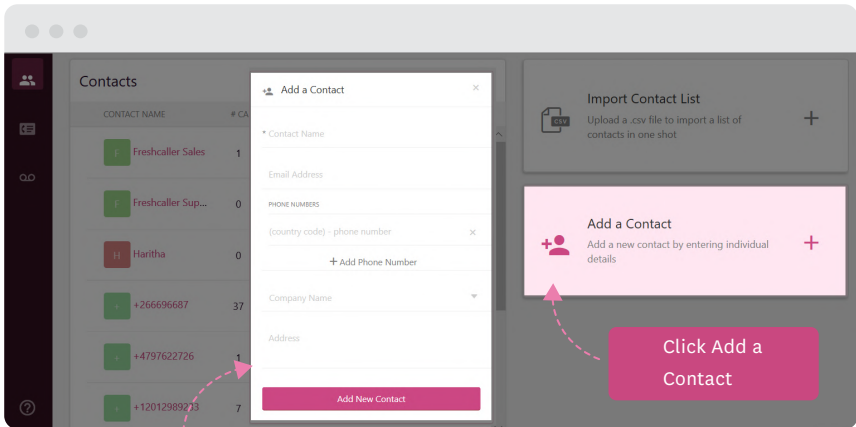


Though your Freshcaller and Freshdesk accounts are integrated, you may still have to import and add your customer list to Freshcaller account.

This ensures a seamless integration between both your accounts.

Create a New contact

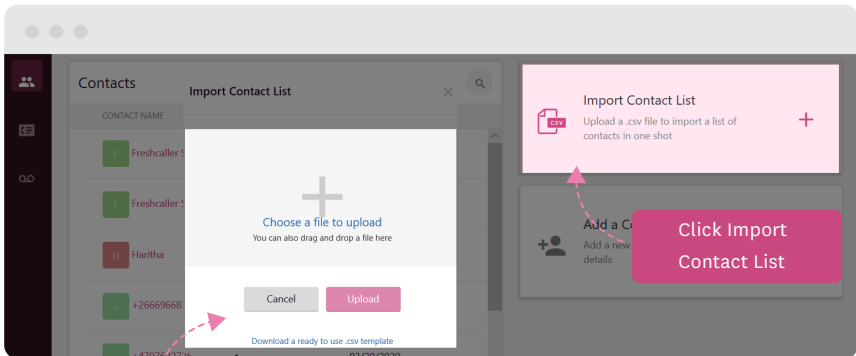
- Click **Add a contact** to open the Add new Contact form
- Fill the details and save the form



Enter contact name,
phone number, and
email address and save
the details.

Import Contact List

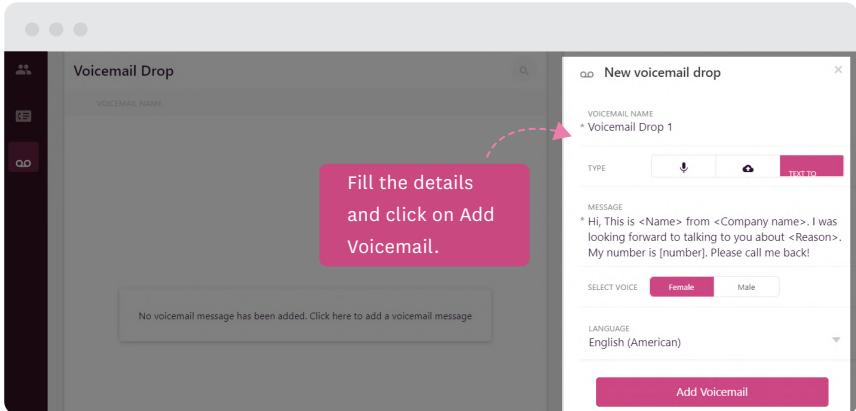
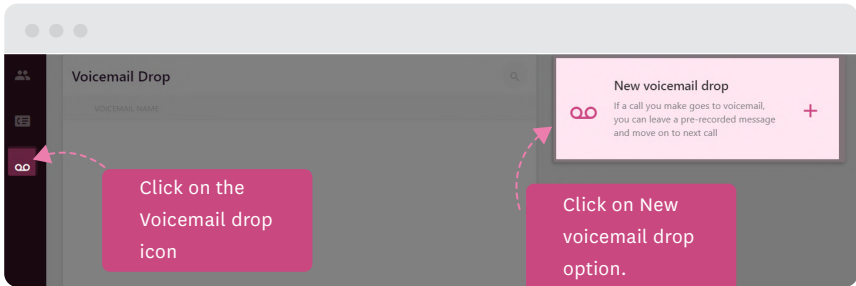
- Click Import Contact List
- Choose and upload the csv file. You can also download the readily available template and fill the details



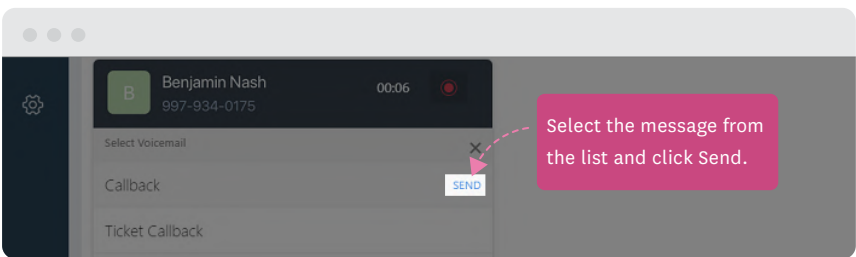
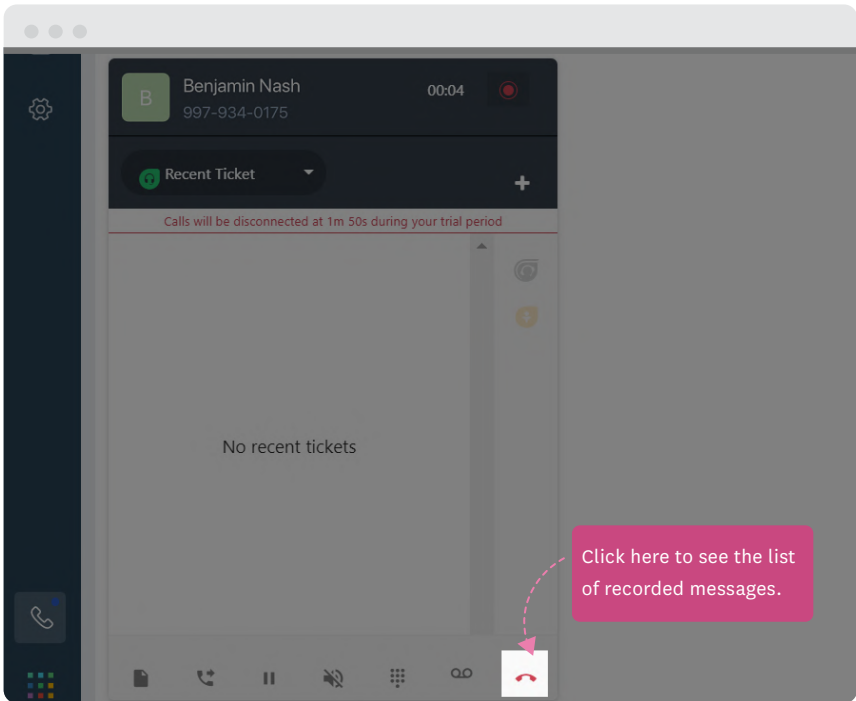
Upload the csv
file with contact
list

#6 Drop voicemail messages

The Freshcaller interface allows you to record custom voicemail messages and use when an outgoing call you make goes unanswered.



You can view and use the recorded voicemail message when you make an outgoing call within the Freshdesk widget.

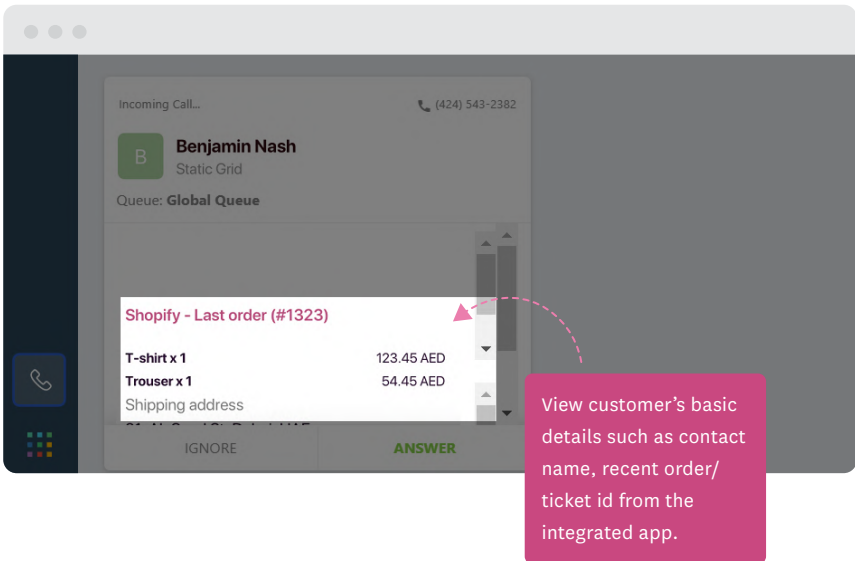


Accessing Integrated Marketplace Apps

The Freshcaller Marketplace integrations allow you to easily access and manage customer data available in other third-party integrated apps.

#1 View third-party app details

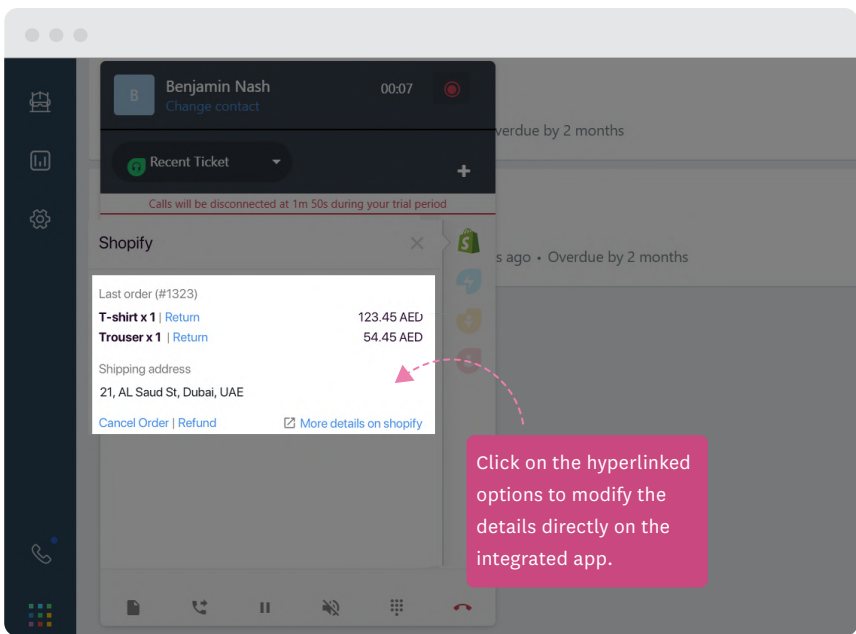
When you dial or receive a call, the customer details are automatically fetched from the third-party app, integrated on your Freshcaller account. You can see the customer's basic details in the incoming call notification.



If the customer information is not available in the app, you will not see any details.

Once the call is connected, you can view detailed information about the customer from the app within the widget.

You can modify the customer details or create new details. When you click on the hyperlinked options, you will be redirected to the app's interface where you can update the change.





Write to us:

support@freshcaller.com