

# Quick Start Guide



# Empower your business with cloud communication solutions

**PROBUZ** is a Leading Provider of Cloud-Based Telephony Services. Our cloud telephony services enable your customers around to connect, collaborate and communicate effortlessly. Establish brand credibility and allow customers to reach you anytime.

This **Quick Start Guide** covers several sections of **PROBUZ**, with this guide you'll get to know how to use the **PROBUZ** portal and provide the best support possible to your customers.

Before getting started, you need to Sign Up on **PROBUZ**, to create an account. Once created, login with the valid credentials to login to your account.



The image shows a screenshot of the PROBUZ Sign In page. At the top, the PROBUZ logo is displayed with the tagline "Next Level IT Solutions". Below the logo, the text "Sign In" is centered. There are two input fields: the first contains the text "CN13790" and the second contains a masked password "\*\*\*\*\*". Below the password field, there is a checkbox labeled "Remember Me" which is currently unchecked. To the right of the checkbox is a blue button labeled "SIGN IN". At the bottom right of the form area, there is a link that says "Forgot Password?".

After **Login** you will be directed to the Dashboard.



**Dashboard** contains live data of the calls, contains some frequently accessible features are added to dashboard that help you attain ease of access about the portal's services like blogs, FAQ's , Video tutorial etc.

A quick access section provides you with a feature to quickly access important services, press Customize button to select any three services that you use most frequently.

## Agents :

The Portal allows you to create, delete and block agents to whom the call will be forwarded.

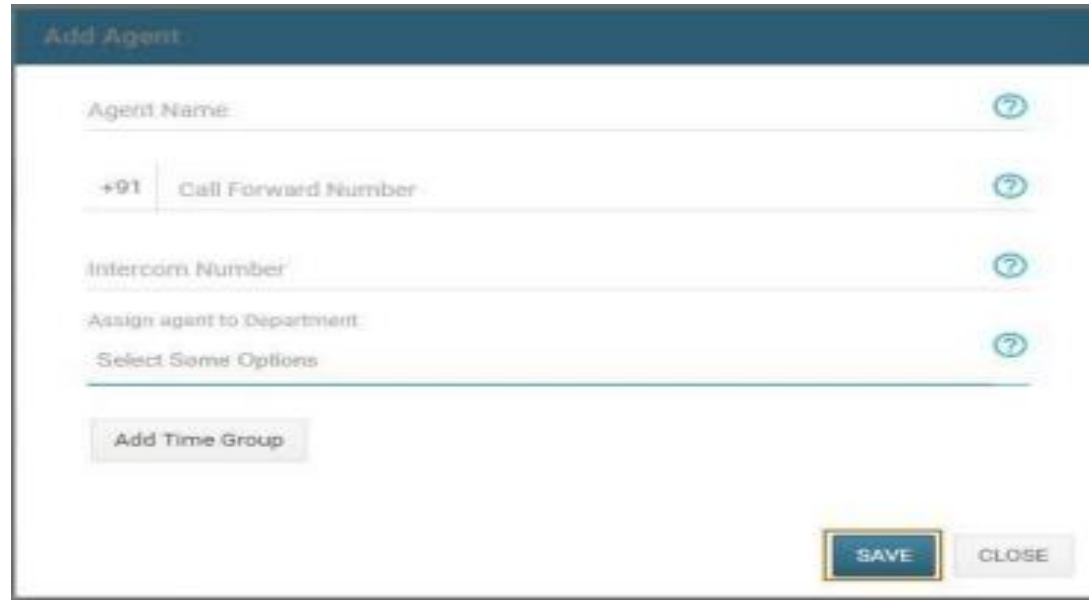


## Steps to create an agent :

- To create an agent , Click on **Agents** tab.
- Click on **Add agent** Button.

Add Agent

- Enter Details & you may select any **Departments**.
- Click on **Save** Button



- An **OTP** will be sent to the agent number , enter the **OTP** received to verify and the agent will be added.

Verify Mobile Number

OTP has been sent to you on your mobile number please enter it below.

\_\_\_\_

Submit Resend OTP

**Note :-** In order to transfer the call from one agent to another follow the given instruction : Press #1(Intercom Number for that agent to whom you want to transfer the call).

## My Number

**Navigation:-** Services -> My Numbers.

Contains the list of all the Numbers you are provided with to receive or broadcast calls using agents.

## Departments

Combine agents under one departments like sales, support etc.

*Navigation:- Services -> My Numbers.*

### Steps to create a department :

- To create an agent , Click on Departments tab.
- Click on **Add Department** Button.



- Enter the details, apply required strategy.
- Select the agent order and use it as a Queue.
- Select a fail-over Destination and press Save.

Add Department

**General Details**

Name*	Description*
Ring Strategy Simultaneously	
Music On Hold Select any Option	If selected, the call will
Sticky Agent No	
Use In all Cases No	

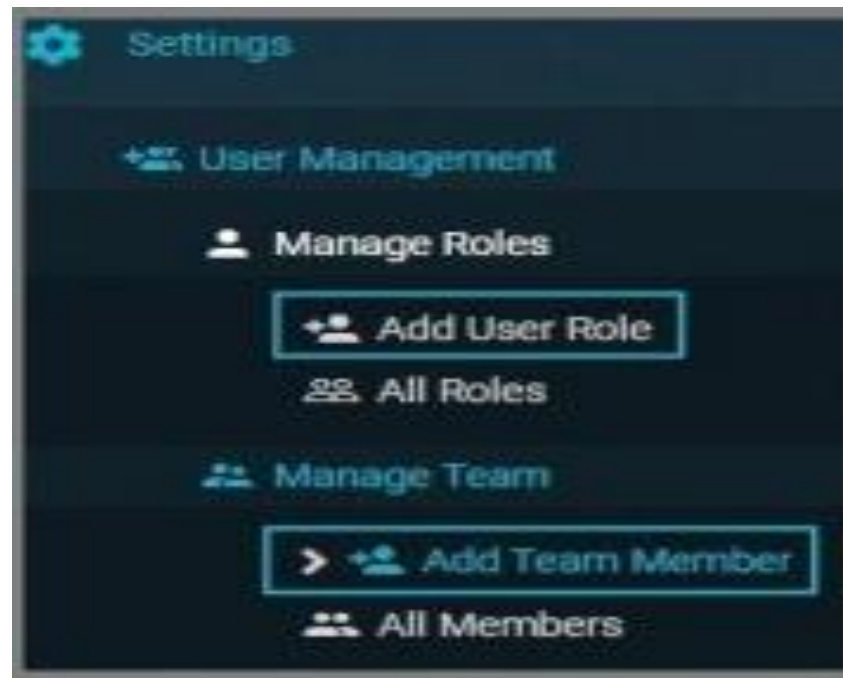
Agent Selection: (Agent at top will have first priority in Order Strategy)

## User Management

*Navigation:- Settings -> User Management*

The Portal allows you to add team members with certain roles and with limited or equal permissions.





## Steps to add User Role :

- Click on add User role.
- Enter the name and description for the role.
- Select checkbox for permissions that are needed to be given to that role.
- Click Save.

## **Steps to add Team members :**

- Click on add Team member.
- Enter the details.
- Allow all IP`s or restrict using selected IP`s.
- Associate agent and enable/disable the status of team member.
- Click Save.

## **Click to Call :**

An instant calling widget, placed on top-right on our website to help you get in touch with customers.

## Steps for Click to Call :

- Click on **Click to Call** button



- Enter the Number to be called, Select the agent and number.
- Click on **“Call”** button to place the call.

Note : Click to Call can take place only between 00:00:00 to 23:59:59.

**Customer Number**

+91 Phone Number

**Select Number**

Select

**Select Agent**

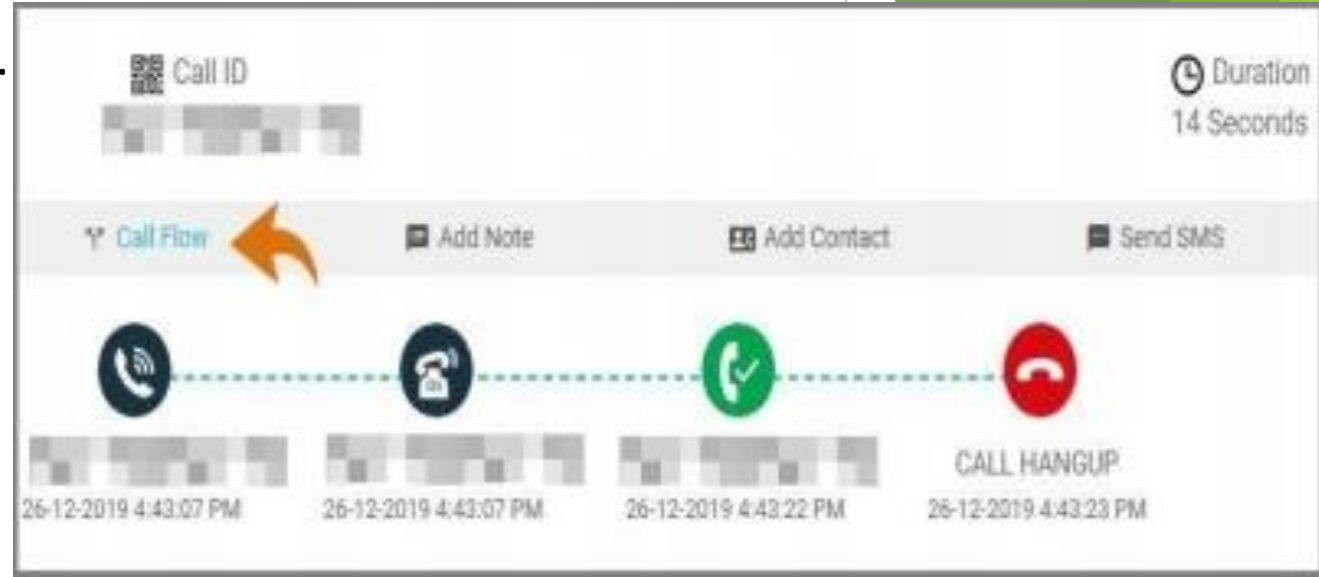
Select

Call

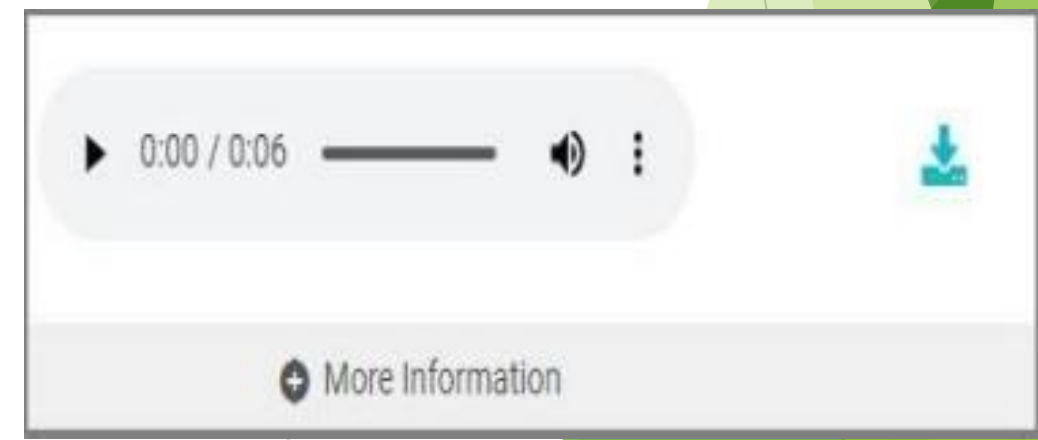
## Call Detail Records (CDR) :

All the detail of your account's call records are stored in this section. This option allows you to view all the detailed call record of incoming calls, click to call and broadcast calls.

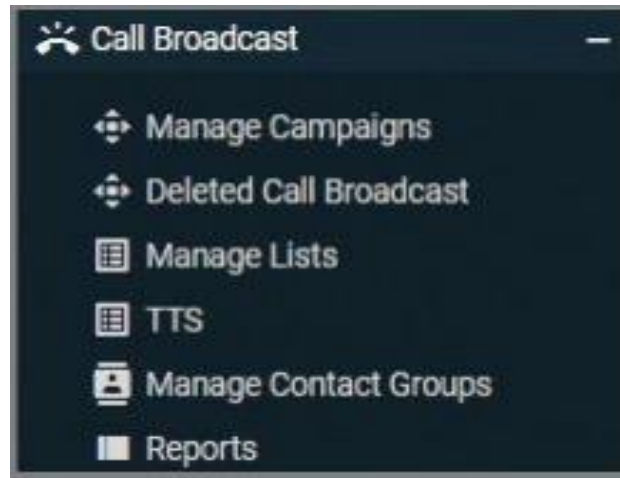
Click on "Call Flow" to view the road map of the call.



You can also listen as well as download any call recording



# Call Broadcast



*Navigation:- Services -> Call Broadcast*

Campaign that places calls without the aid of human agents.

## Steps to add a campaign :

- Click on **Manage**
- Click on **Add Campaign** Button on top-right.



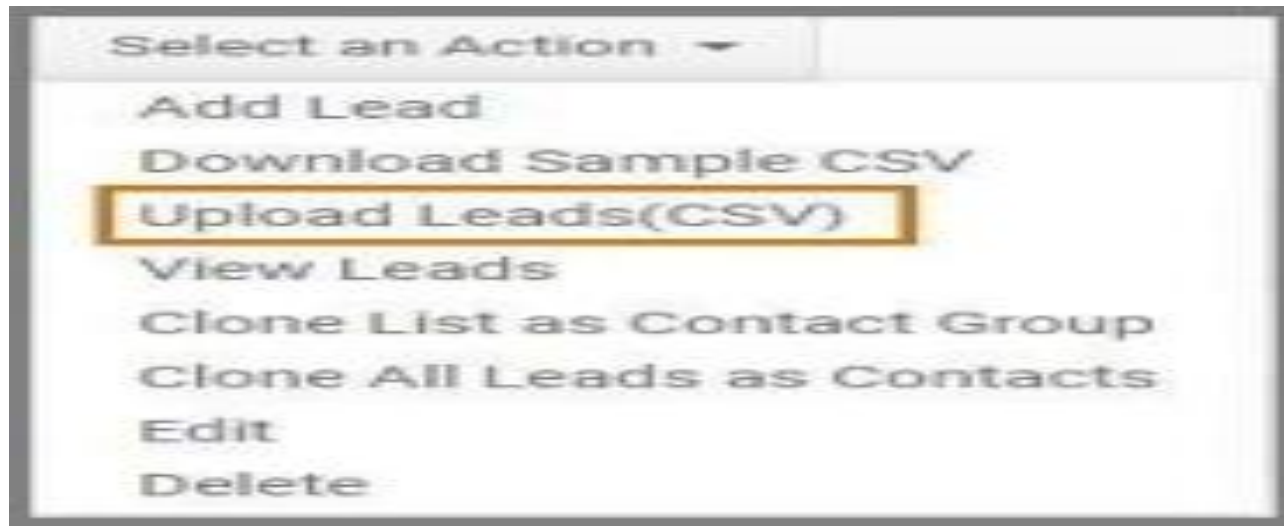
- Enter the General details and time group.
- Assign a Caller Id Number, Destination and Ring timeout.
- Select a Broadcast plan from Billing settings.
- Select SMS service, if needed.
- Click Save and your campaign has been created.❓

### **Steps to add Lead list :**

- ❓ Click on **Manage Lists**.
- ❓ Click on **Add List** Button on top-right.
- Enter details and press Save.



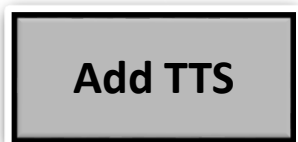
- Now select the list and Click on “Select an action” button.



- Click on Upload Leads button to upload a .csv file or choose from any additional list.

## Steps to add Text-to-Speech(TTS) :

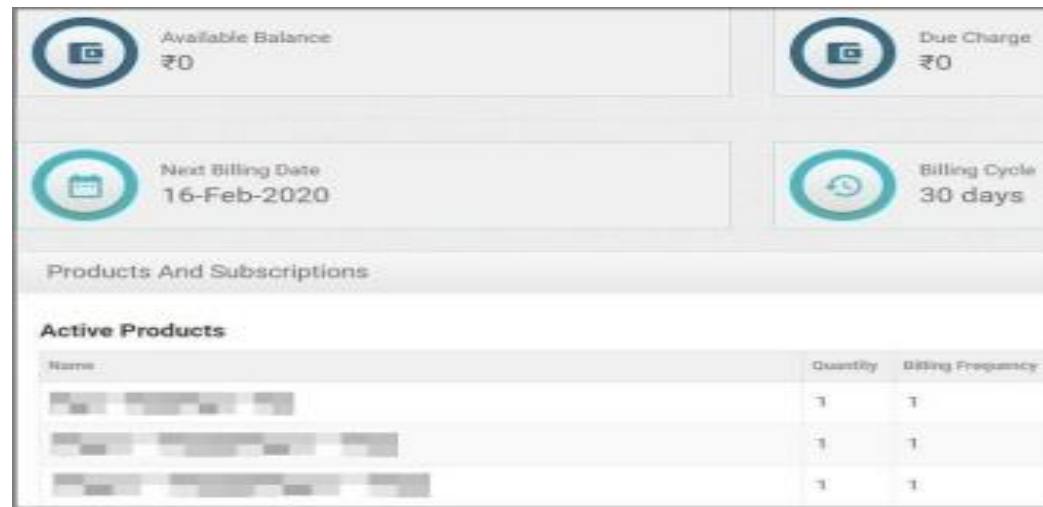
- ❓ Click on **TTS**.
- ❓ Click on **Add TTS** Button on top-right.



- Enter the general details.
- Select TTS types (Single or Multiple), Input speech language, apply it on any list.
- Enter the message and Click Save.

**Note** :- You can apply TTS to auto-attendant and IVR.

## **Billing** :





**Online Payments** - Enables you to track payments made via razorpay, instamojo or any other online method.

**Offline payments** - enable you to track payments made via cheque`s, bank transfers and other offline means.

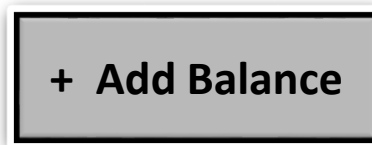
**Transactions** - this section stores all the transactions of your account.

**Due Charges** - Your account's due charges which you must pay before account gets suspended can be checked here.

**Invoice** - This section stores all the invoices of your account's monthly billing.

### **Steps to add Balance :**

- Click on **Add Balance** on **Billing Dashboard**.



- Select the Payment Gateway and make payment, it will be reflected in your account.

***Note :- You can also enable AutoPay and set a balance threshold, for more ease of access.***

# PROBUZ TECHNOLOGIES

**Office Address** - ProbuZ Technologies, Manish Nagar IT Park, Behind UCO Bank ,  
Nagpur.

**Website** - <https://www.probuZtech.com/cloud>

**Mobile No** - 7875006688

**Call Timing** - 10:00 AM to 7:00 PM