Ameyo 4.3

Administrator Manual

Abstract

It introduces to the Administrator Manual for Ameyo 4.3 GA.

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1. Ameyo Administrator Login

The Administrator has an access to web based interface with privilege to manage a single tenant, its campaigns, users, call managers etc. In order to access the administrator screen, user needs to select the desired language from the drop down provided at top right corner of the screen.

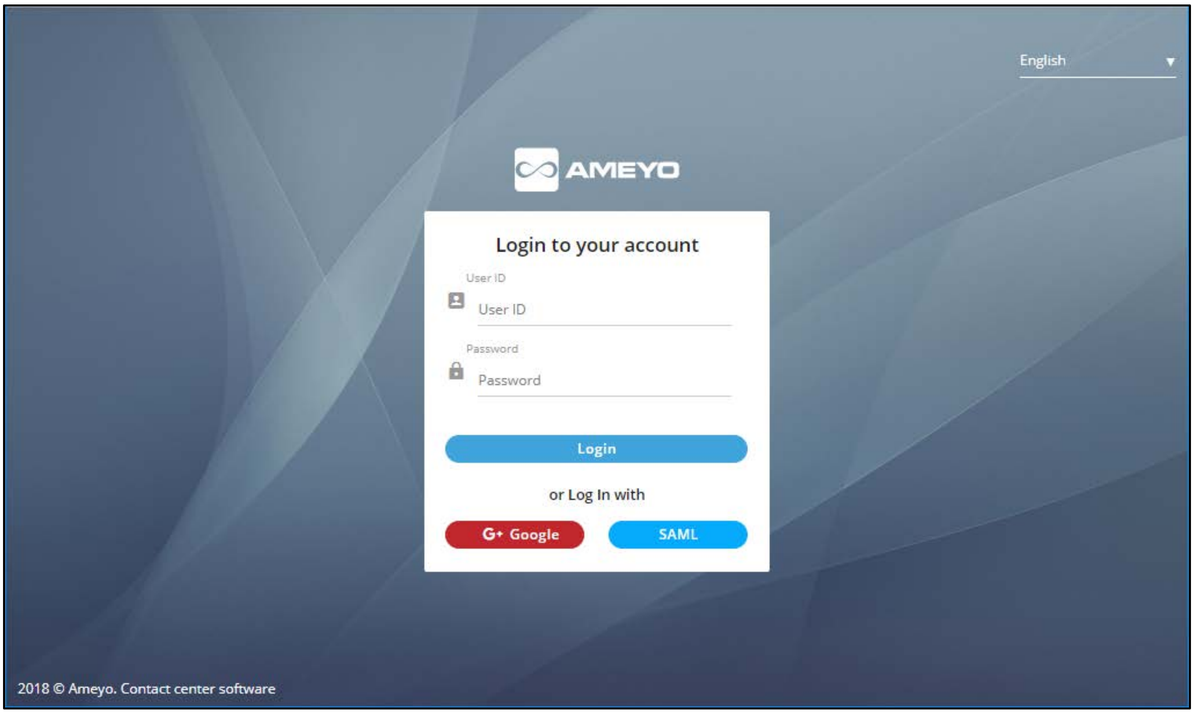


Figure: Login Screen

1. Use any of the following methods to login.

   A. **Normal Login:** The agent needs to enter the "User ID" and "Password" which is provided by the administrator in the login screen and click **"Login"**.

   B. **Login with SAML:** Security Assertion Markup Language(SAML) is an XML-based framework for ensuring that transmitted communications are secure. SAML can be be utilized to exchange authentication information, allowing single sign on capabilities for Web services. For example, If a customer has an Identity Provider (IDP) and requires that authentication of users should be done using the same IDP, an integration between Ameyo and the IDP will be done to allow single sign on through SAML. Significance of using SAML is that users don't have to use Ameyo user credentials to login, instead the users log in using single sign on with the integrated IDP.

Click "SAML" to login with your SAML Account hosted at your IDP (Identity Provider).

C. **Google:** User can also login using its Google account. User don't have to use Ameyo user credentials to login, instead users can login using Single-Sing-On by just logging into its Google account.

Click "Google" to login with your Google account.

After the Administrator logins successfully, the **"System"** tab is displayed.

2. Administrator Console

Administrator can setup the entire system, user, and process for a contact center. Following is a screenshot of its interface.

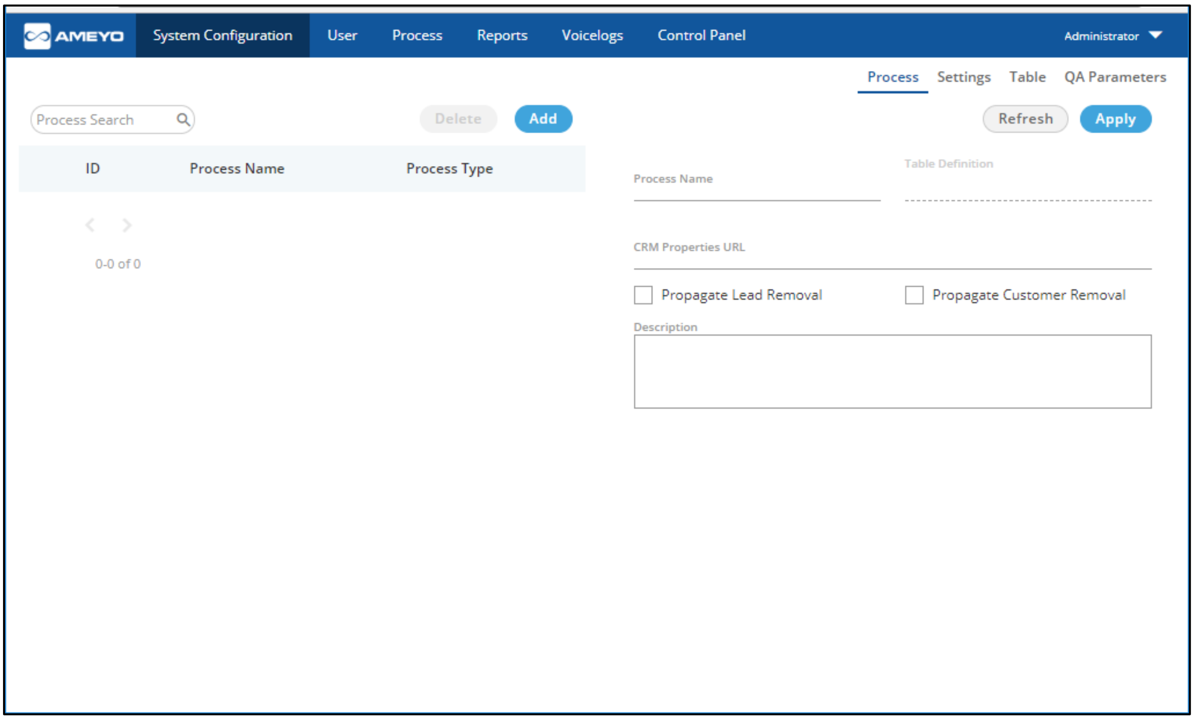


Figure: Ameyo Administrator Workbench

2.1 System Tab

Administrator can navigate below mentioned tabs. Click the links to know more about the same.

- **System Tab**
  - System Configuration
  - App Manager
- **User**
- **Process**

- **Call Manager**
- Reports
- Voice Logs
- Call Manager
- Ameyo Control Panel

App Configuration (that is App Manager), Reports, and Call Manager has to be enabled in the backend to view and access these tabs. If not enabled, these tabs will not be visible. These tabs will be discussed in different documents.

3. Quick Startup Guides

3.1 Quick Startup Guides

The sequential steps to configure any type of campaign are discussed in the following pages. You can click the links to know more about them.

- **Quick Startup Guide for Chat Campaign**
- **Quick Startup Guide for Interaction Campaign**
- **Quick Startup Guide for Interactive Voice Application Campaign**
- **Quick Startup Guide for Outbound Voice Campaign**
- **Quick Startup Guide for Parallel Predictive Voice Campaign**
- **Quick Startup Guide for Voice Blast Campaign**

3.2 Quick Startup Guide for Chat Campaign

Go through the following pages one-by-one to create and manage a Chat Campaign.

- Create Table Definition (Optional)
- Create Table Column Mapping (Mandatory): If you want to add the searchable custom fields in Customer Information)
- Create Process
- Create Users (Mandatory)
- Configure Chat Themes (Optional)
- Create a Chat Campaign
- Manage Dispositions (Optional)
- Manage Holiday/Office Hours (Optional)
- Configure Chat Campaign Settings

3.3 Quick Startup Guide for Interaction Campaign

Go through the following pages one-by-one to create and manage an Interaction Campaign.

- Create Table Definition (Optional)
- Create Table Column Mapping (Mandatory): If you want to add the searchable custom fields in Customer Information)
- Ticket Settings
- Create Process
- Create Users (Mandatory)
- Configure Custom Fields (Optional)
- Configure Customer Cards (Optional)
- Create an Interaction Campaign
- Configure Email, Twitter, and Facebook Media Profiles (As per requirement)
- Create Canned Messages (Optional)
- Create Routing Rules (Optional)
- Manage Dispositions (Optional)
- Manage Holiday/Office Hours (Optional)
- Configure Spam Filter (Optional)
- Create Event-based and Timer Automation Rules (Optional)
- Create Ticket States (Mandatory to create External States)
- Configure Interaction Campaign Settings

3.4 Quick Startup Guide for Interactive Voice Application Campaign

Go through the following pages one-by-one to create and manage an Interactive Voice Application Campaign.

- Create Table Definition (Optional)
- Create Table Column Mapping (Optional)
- Configure System Settings
- Create Mapping Policies
- Create QA Parameters
- Create Process
- Create Users (Mandatory)
- Create an Interactive Voice Application Campaign
- Configure Blended Campaign Settings (As per requirement): If you want to force the user to select more than one campaigns during logon.
- Routing at System Level (Optional)
- Manage Dispositions (Optional)
- Manage Holiday/Office Hours (Optional)
- Create Skills (Optional): If you want to perform skill-based routing.
- Manage Exclusions at System Level (Optional)
- Manage Voicemail Prompts at System Level (Optional)
- Create and Manage Rules (Optional)
- Configure Call Manager (Manadatory)
- Configure Interactive Voice Application Campaign Settings

3.5 Quick Startup Guide for Outbound Voice Campaign

Go through the following pages one-by-one to create and manage an Outbound Voice Campaign.

- Create Table Definition (Optional)
- Create Table Column Mapping (Optional)
- Create Table Filters to filter Customers (Optional)
- Configure System Settings
- Create Mapping Policies
- Create QA Parameters
- Create Process
- Create Users (Mandatory)
- Create an Outbound Voice Campaign
- PACE State (As per requirement): If you want to use PACE along with Predictive Dialer.
- PACE Rule (As per requirement): If you want to use PACE along with Predictive Dialer.
- Configure Blended Campaign Settings (As per requirement): If you want to force the user to select more than one campaigns during logon.
- Manage Dispositions (Optional)
- Manage Holiday/Office Hours (Optional)
- Create Skills (Optional): If you want to perform skill-based routing.
- Manage Exclusions at System Level (Optional)
- Manage Voicemail Prompts at System Level (Optional)
- Create and Manage Rules (Optional)
- Configure Call Manager (Manadatory)
- Configure Outbound Voice Campaign Settings

3.6 Quick Startup Guide for Parallel Predictive Voice Campaign

Go through the following pages one-by-one to create and manage a Parallel Predictive Voice Campaign.

- Create Table Definition (Optional)
- Create Table Column Mapping (Optional)
- Create Table Filters to filter Customers (Optional)
- Configure System Settings
- Create Mapping Policies
- Create QA Parameters
- Create Process
- Create Users (Mandatory)
- Create a Parallel Predictive Voice Campaign
- PACE State (As per requirement): If you want to use PACE along with Predictive Dialer.
- PACE Rule (As per requirement): If you want to use PACE along with Predictive Dialer.
- Configure Blended Campaign Settings (As per requirement): If you want to force the user to select more than one campaigns during logon.
- Manage Dispositions (Optional)
- Manage Holiday/Office Hours (Optional)
- Create Skills (Optional): If you want to perform skill-based routing.
- Manage Exclusions at System Level (Optional)
- Manage Voicemail Prompts at System Level (Optional)
- Create and Manage Rules (Optional)
- Configure Call Manager (Manadatory)
- Configure Parallel Predictive Voice Campaign Settings

3.7 Quick Startup Guide for Voice Blast Campaign

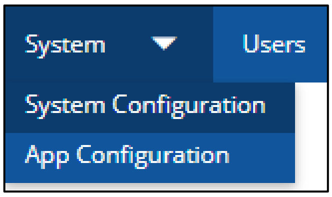
Go through the following pages one-by-one to create and manage a Voice Blast Campaign.

- Create Table Definition (Optional)
- Create Table Column Mapping (Optional)
- Create Table Filters to filter Customers (Optional)
- Configure System Settings
- Create Mapping Policies
- Create QA Parameters
- Create Process
- Create Users (Mandatory)
- Create a Voice Blast Campaign
- PACE State (As per requirement): If you want to use PACE along with Predictive Dialer.
- PACE Rule (As per requirement): If you want to use PACE along with Predictive Dialer.
- Configure Blended Campaign Settings (As per requirement): If you want to force the user to select more than one campaigns during logon.
- Manage Dispositions (Optional)
- Manage Holiday/Office Hours (Optional)
- Create Skills (Optional): If you want to perform skill-based routing.
- Manage Exclusions at System Level (Optional)
- Manage Voicemail Prompts at System Level (Optional)
- Create and Manage Rules (Optional)
- Configure Call Manager (Manadatory)
- Configure Voice Blast Campaign Settings

4. System Tab

4.1 System Tab

If App Manager (App Configuration) is not enabled in the backend, only "System Configuration" option will be visible and accessible. If this is enabled, then the following drop-down menu will be visible.



System Menu

This menu contains the following two options. Click the links to know more about them.

- **System Configuration**
- **App Configuration:** Please refer to "App Configuration" document to know more about the same.

4.2 System Configuration

4.2.1 System Configuration

Administrator can configure system level settings through this tab. Following sub tabs are available in the "System Tools" tab. Click the links below to know more about them.

- Process
- Settings
- Table
- QA Parameters

4.2.1.1 CRM Configuration

You have to configure the CRM before proceeding to setup the system, process, and other settings.

Please refer to the Installation and Configuration Guide for Ameyo to know the steps to configure CRM.

4.2.2 Process in System Configuration

4.2.2.1 Process

After System, the Process is the second and main component in the hierarchy. Campaign, Users, and other settings are created in a process. The very first step to setup the contact center is to create a process. Following is a screeenshot of "Process Tab".

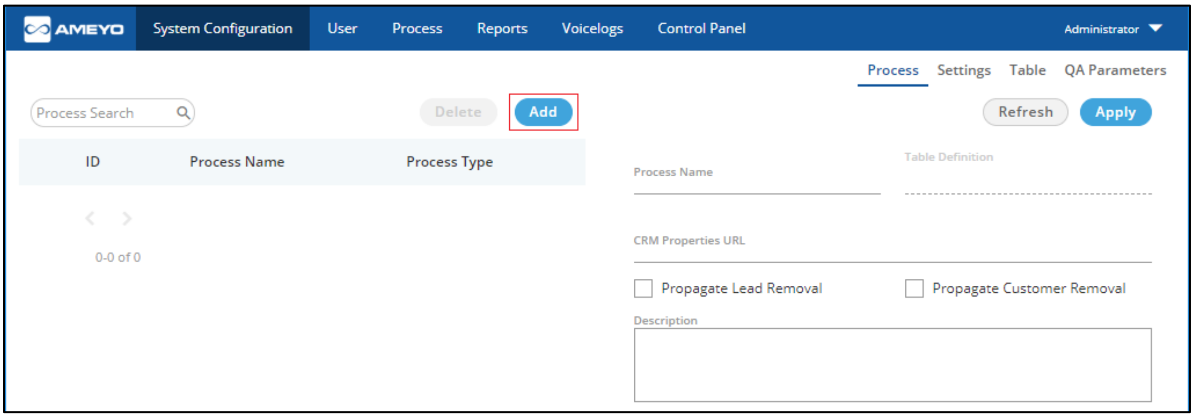


Figure: Process Tab

4.2.2.1.1 Create Process

Perform the following steps to create a process.

1. Click "Add" to create a process using the following pop-up.

Figure: Create Process

2. Administrator has to provide the inputs for the following fields.
    - Process Name
    - Description
    - Process Type
    - Table Definition

Figure: Creating a Process

3. Click "Done" to create the process. The process is created and displayed on the screen.

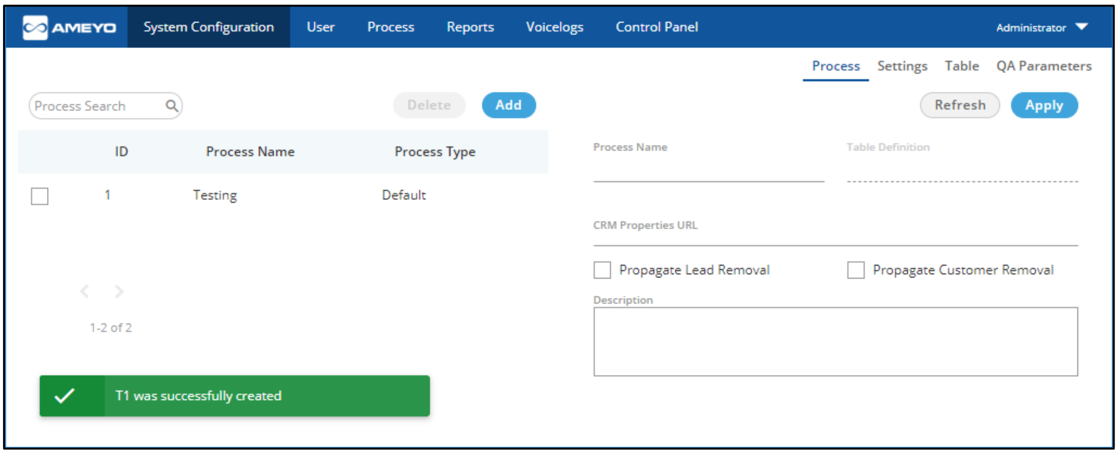


Figure: Created a Process

Multiple processes can be created using these steps. However, the process IDs will remain different.

4.2.2.1.2 Delete Process

Administrator can delete any process by following below steps.

1. Select the process that needs to be deleted.

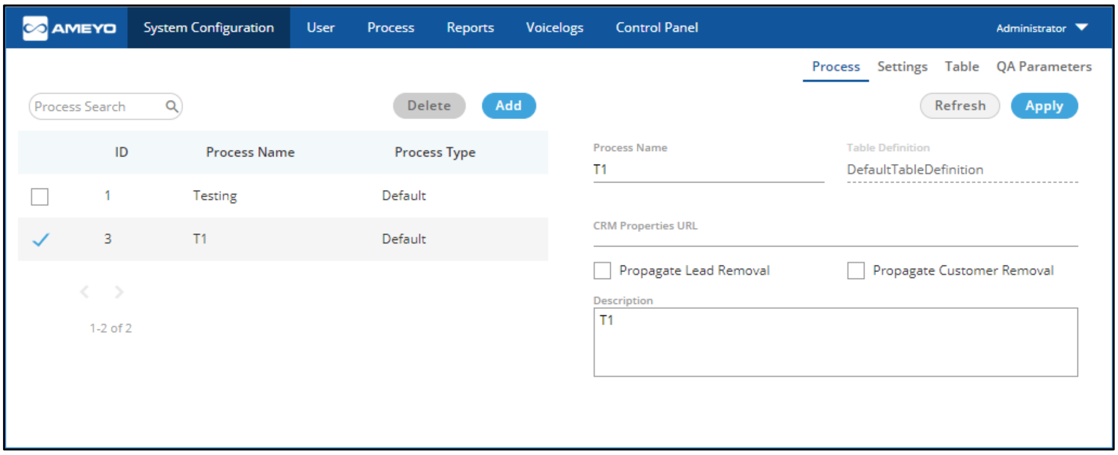


Figure: Delete Process

2. Click "Delete". It shows the following warning message on the screen.

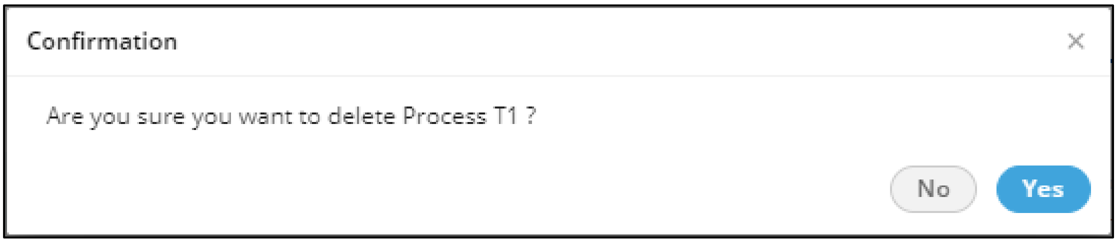


Figure: Confirmation Message

3. Click "Yes" to delete the process.

   Click "No" to not delete the process.

   When you click "Yes", the process will be deleted and removed from the list.

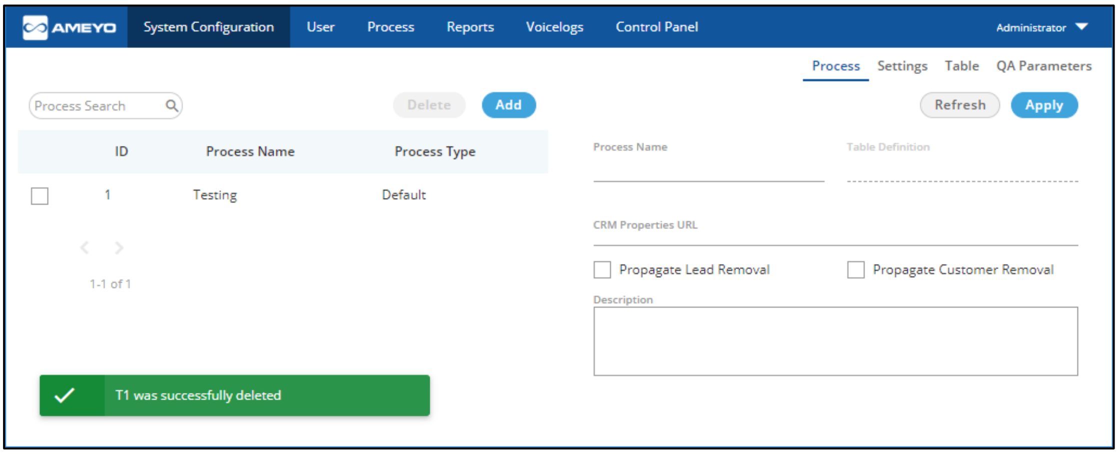


Figure: Deleted a Process

The ID of the deleted process cannot be reused. It will remain consumed even after deletion of the process.

4.2.2.1.3 Add Process Details

Perform the following steps to configure the details for a process.

1. Select the process in the left side section. The fields (such as Process Name and Description) will be populated in the right side section.
2. You have to provide the inputs for the following fields.

   A. **CRM Properties URL:** User can enter the the URL of the CRM that needs to be configured for a particular process.

B. Propagate Lead Removal

C. Propagate Customer Removal

3. Click "Apply" to apply the changes.

   Whereas, click "Refresh" button to discard the changes.

4.2.3 Settings in System Configuration

The administrator can configure system settings, ticket settings, and mapping policies through below mentioned tabs.

- System Settings
- Ticket Settings
- Mapping Policies

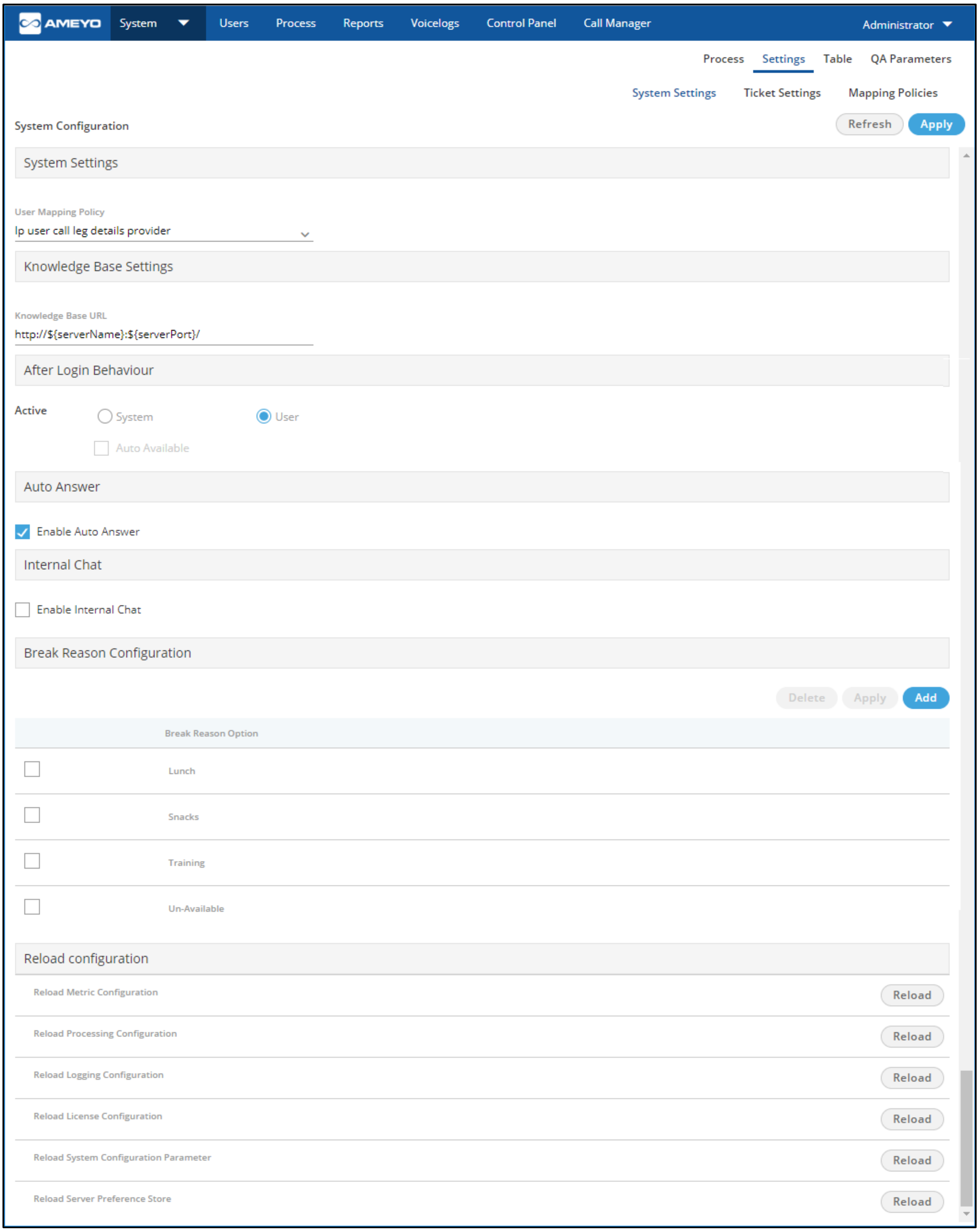


Figure: Settings Tab → System Settings

Click the links in the following navigation bar to read about these settings.

4.2.3.1 System Settings

This tab contains the system settings, which are listed hereinbelow.

1. **User Mapping Policy**: Administrator can map the phone device with the respective user's machine. Agent telephony shall be assigned with static IP, same can not be on DHCP.

    A. The Administrator can select the phone mapper type values from the drop down to map the extensions with particular IP. This option can be used to avoid wrong selection of Telephony Channel by the user while logging into the system.

    I. **IP user call leg details provider:** To map one IP with single extension. The Agent need not to select the extension as the IP is already mapped with an extension while logging into the system. The applied settings will be applicable for the user who gets the option to select the call context while logging into system.

    It is the default option, hence listed here first. However, it comes at fourth position in the interface.

    II. **IP multiple user call leg details provider:** This mapper can be used to map an IP with multiple call contexts. The applied settings will be applicable for the user who gets the option to select the call context while logging into system. This phone mapper type will be enabled after procuring appropriate license component at the center.

    III. **User ID based call leg details provider:** This mapper can be used if webRTC is being used. This phone mapper type will be enabled after procuring appropriate license component at the center.

    IV. **Manual user call leg details provider**: This mapper policy can be used when if no mapping needs to be done.

2. **Knowledge Base Settings**: The Administrator can define the knowledge base page URL here. Supervisor, agents, and other users will view this page on the Home

screen of their workbenches.

Modify the value of "Knoweldge Base URL" field. It's default value is given below.

http://${serverName}:${serverPort}/

3. **After Login Behaviour :** Using this feature, the administrator can define the after login behaviour. It contains the following two options. Any one of them can be selected only.

   2.

   - **System:** The system should automatically make agent available. To make the agent automatically available, check "Auto Available" checkbox.

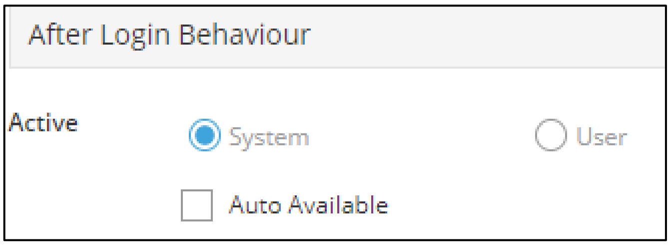


Figure: System Auto-Available Option

   - **User:** Select this option to let agent decide whether to make available or not.

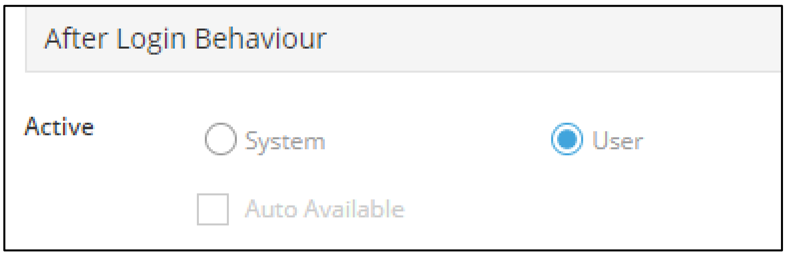


Figure: User Available Option

3. **Auto Answer**: If **"Enable Auto Answer"** is checked then call will be auto-answered in all the campaigns of the contact center. Users with auto-call on status will automatically receive the auto-dialed and inbound calls and they do not have to answer each call manually.

Only first call offered to the user needs to be answered manually after that all calls thrown by dialer will be auto answered.

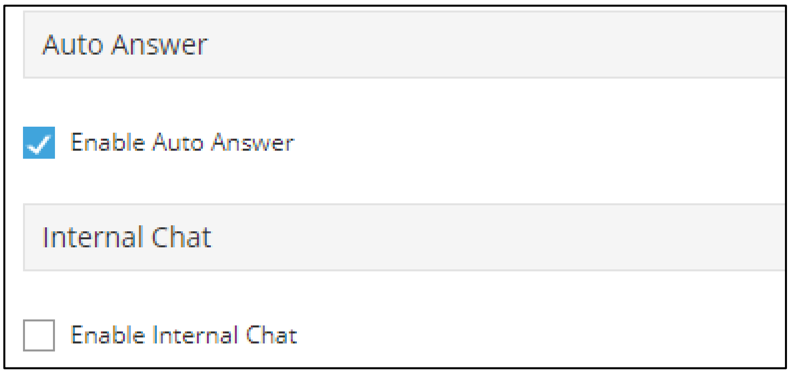


Figure: Auto-Answer and Internal Chat options

4. **Internal Chat :** The Administrator can enable or disable the internal chat. After enabling it, the Supervisor, Agents, and other users can use the internal chat to commmunicate with each other. A static chat icon will be displayed on the bottom right corner of the interface of every user.
5. **Break Reasons**: Administrator can add the break reasons for the contact center. Created break reasons will be applied at system level and same will be visible to agents on Ameyo Web Access. While going on break, agents can select the respective break reason.

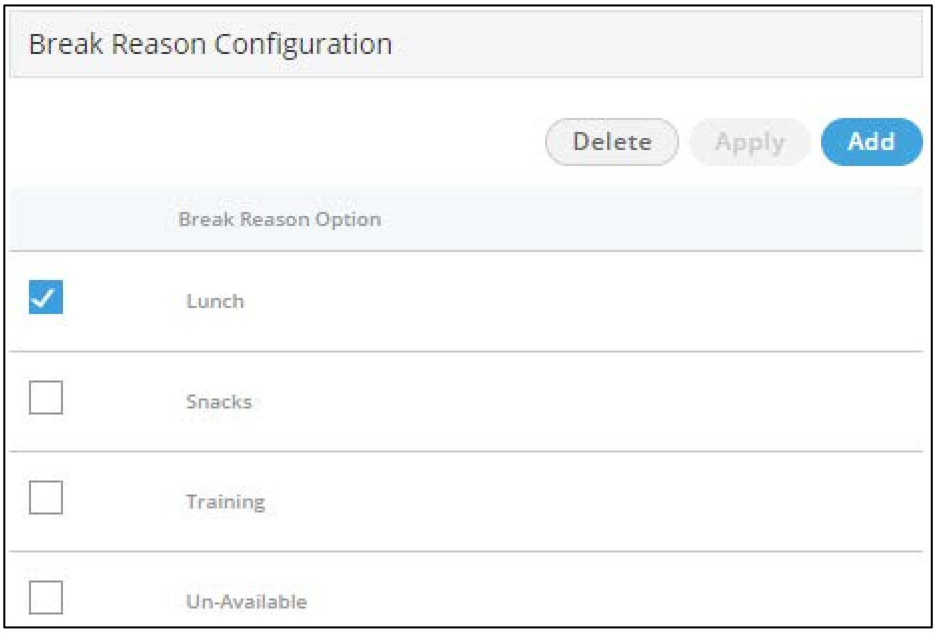


Figure: Break Reason Configuration

Perform following steps to add break reason.

5.

A. To add a break reason, click on **"Add"** button.

B. Enter the name of break reason.

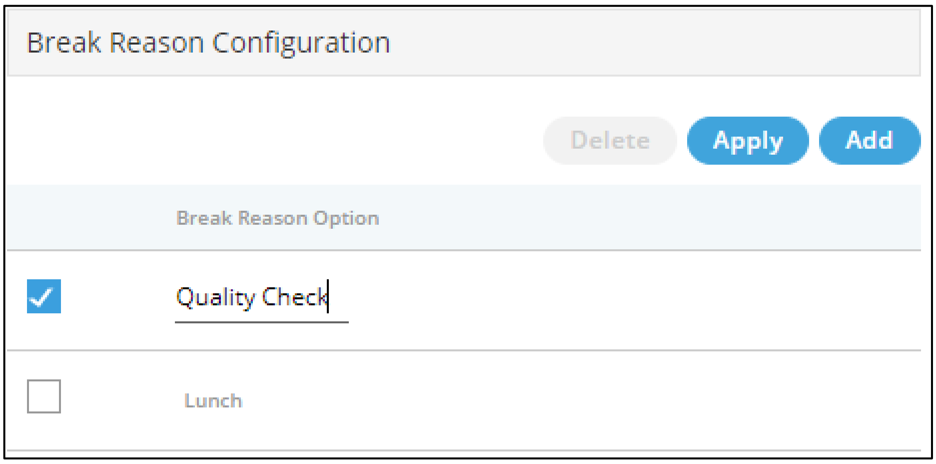


Figure: Add a Break Reason

C. Click **"Apply"** button to create the break reason.

Perform the following steps to delete a break reason.

D. Select a break reason and click "Delete". A warning message is displayed on the screen.

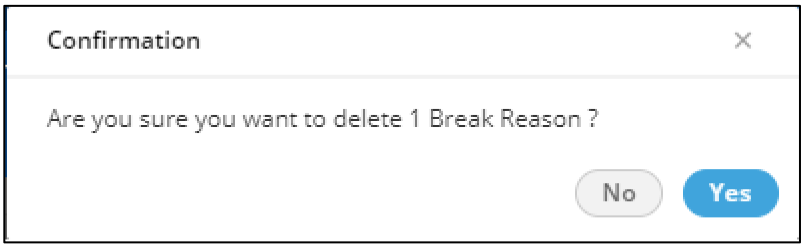


Figure: Asking to delete a Break Reason

E. Click "Yes" to delete the selected break reason.

Deleting a break reason will impact all users, queues, and campaigns where this break reason has been applied already. Make sure to modify their settings.

You cannot edit a break. Instead of it, delete a break and add a new one.

6. **Reload Configuration:** This section contains the following buttons that lets you reload the configuration of different Ameyo components. After clicking a button to reload the selected configuration, you have to logout from Administrator Console and then login again to make it effective.

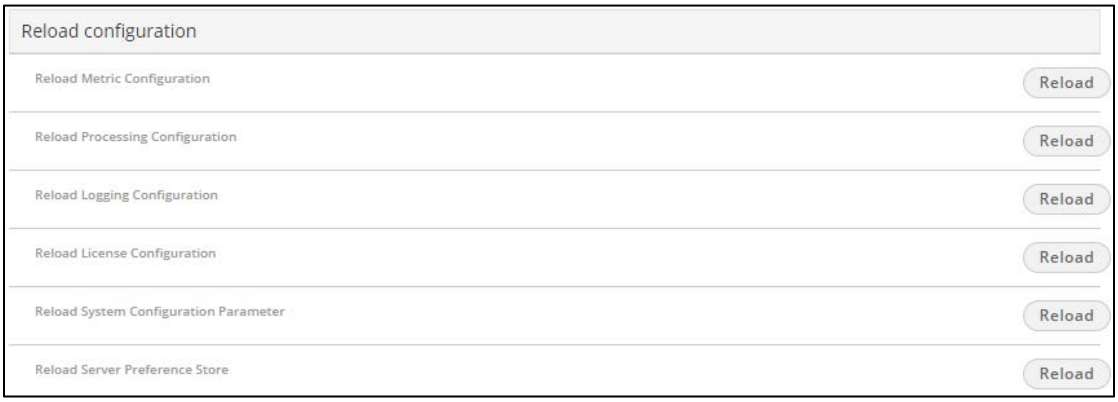


Figure: Reload Configuration Section

A. **Reload Metric Configuration:** Click this button reload the metric configuration.

B. **Reload Processing Configuration:** Click this button reload the processing configuration.

C. **Reload Logging Configuration:** Click this button reload the logging configuration.

D. **Reload License Configuration:** Click this button reload the license configuration.

E. **Reload System Configuration Parameter:** Click this button reload the system configuration parameter.

F. **Reload Server Preference Store:** Click this button reload the server preference store.

4.2.3.2 Ticket Settings

In this Tab, Administrator can define the Ticket Settings.

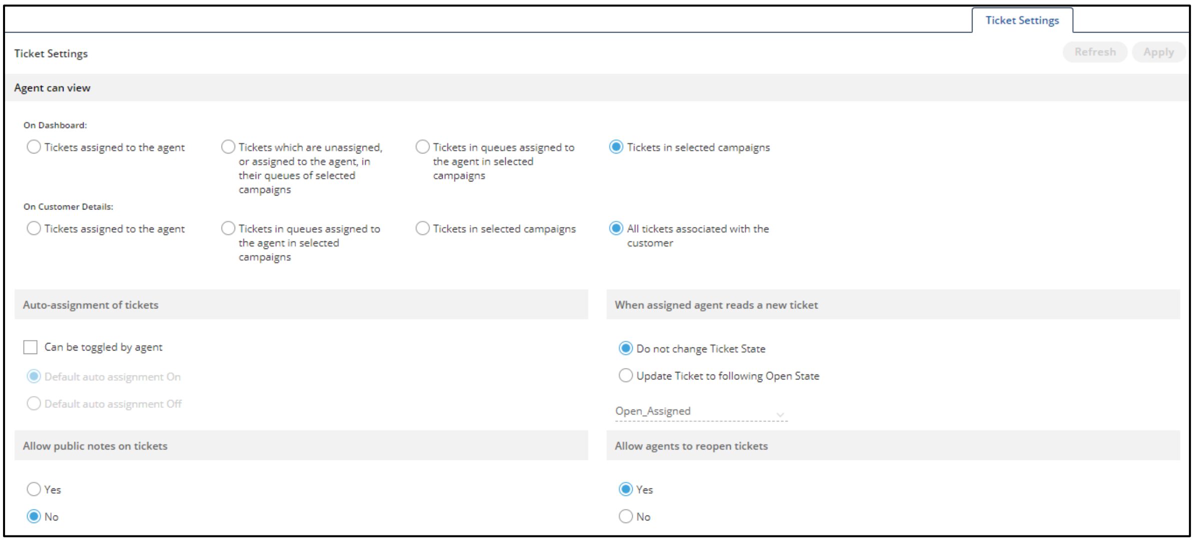


Figure: Ticket Settings

It contains the following settings.

1. **<u>Agent can view</u>:** Select the type of tickets that an agent can see.

   A. **On Dashboard:** Select the types of tickets that an agent can see on the dashboard.

I. Tickets assigned to the agent: Select it to let the agent view only those tickets that are assigned to the agent.

II. Tickets assigned to the agent and all unassigned tickets: Select it to let the agent view all unassigned tickets and those tickets that are assigned to the agent.

III. All Tickets: Select it to let the agent view all tickets such as assigned tickets to the agent itself, unassigned tickets, and tickets assigned to other agents.

B. **On Customer Details:** Select the types of tickets that an agent can see in the customer details.

I. Tickets assigned to the agent: Select it to let the agent view only those tickets that are assigned to the agent.

II. Tickets assigned to the agent and all unassigned tickets: Select it to let the agent view all unassigned tickets and those tickets that are assigned to the agent.

III. All Tickets: Select it to let the agent view all tickets such as assigned tickets to the agent itself, unassigned tickets, and tickets assigned to other agents.

2. **When assigned agent reads a new ticket:** Select the state of ticket that has been read by its assigned agent. It contains the following options.

   A. **Do not change ticket state:** Select it to not change the state of a ticket after an agent reads its new assigned ticket.

   B. **Update ticket to following open state:** Select it to change the update the state of the ticket (that has been read by the agent) to "Open".

3. **Auto-assignment of tickets:** Configure this option to allow or disable the agents turn on or off their availability in interaction campaign and auto-assignment of tickets.

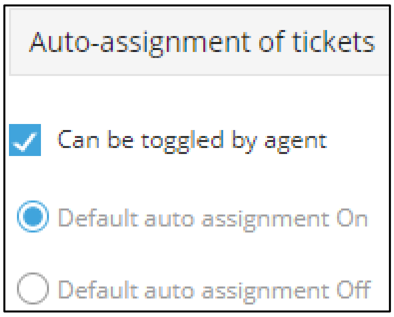


Figure: Auto-Assignment of Tickets

It contains the following options.

A. **Can be toggletd by agent:** Select it to let the agents turn on or off their availability in the Interaction Campaign and the auto-assignment of tickets. You can uncheck it to disable this agent functionality. After enabling it, you can select any of the following options.

   I. **Default Auto-Assignment On:** Select it to turn on the Auto-Assignment of Tickets by default. It means the agent will remain available in Interaction Campagin, by default. However, agent can turn this feature off for itself.

   If "Default Auto-Assignment On" is selected, the Auto-Assignment of Tickets will remain on for the entire campaign. An agent can turn it off only for itself but not for the complete campaign.

   II. **Default Auto-Assignment Off:** Select it to turn off the Auto-Assignment of Tickets by default. This feature will remain turn off the entire campaign.

   If "Default Auto-Assignment Off" is selected, the Auto-Assignment of Tickets will remain disabled for the entire campaign. However, an agent can turn on the Auto-Assignment of Tickets for itself only.

4. **Allow public notes on tickets:** Configure this option to allow or disable the public notes on the tickets. The public notes will be visible to all users. It contains the following options.
    A. **Yes:** Select it to allow the public notes on the tickets.
    B. **No:** Select it to disable the public notes on the tickets.
5. **Allow agents to reopen tickets:** Configure this option to allow or disable to agents to reopen the closed tickets. It contains the following options.
    A. **Yes:** Select it to let the agents reopen the closed tickets.
    B. **No:** Select it to not allow the agent to reopen the closed tickets.

4.2.3.3 Mapping Policies

Through this tab, Administrator can define mapping policies.

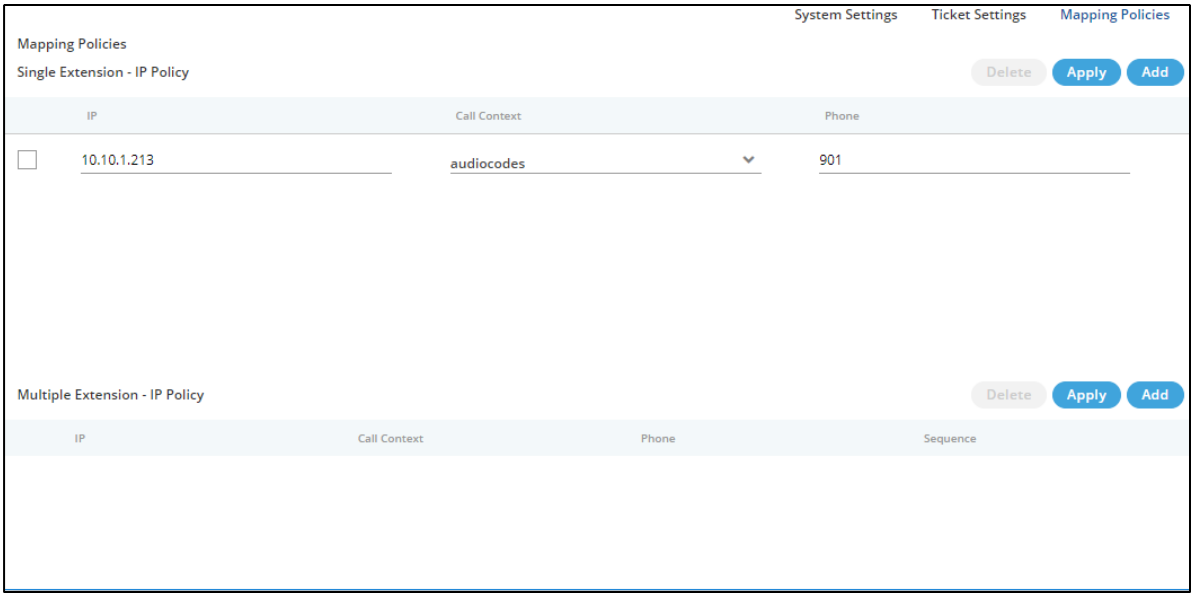


Figure: Mapping Policies

1. **Single Extension - IP Policy:** To map one IP with single extension, Administrator needs to follow below steps:
    A. Click on **"Add"** button.
    B. Enter the IP Address.

C. Select the Call Context.

D. Enter the Phone number (extension).

E. Click on **"Apply"** button.

F. To delete any existing mapping, select the same and click on "Delete" button.

2. **Multiple Extension - IP Policy:** To map an IP with multiple call contexts, Administrator needs to follow below steps:

   A. Click on **"Add"** button.

   B. Enter the IP Address.

   C. Select the Call Context.

   D. Enter the Phone number (extension).

   E. Select the Sequence.

   F. Click on **"Apply"** button.

   G. To delete any existing mapping, select the same and click on **"Delete"** button.

4.2.4 Table in System Configuration

Table tab stores the customer information (configuration related) in Ameyo. There are some fields required for the integration with Ameyo (Primary Key etc.). In that case, we define the data types or columns.

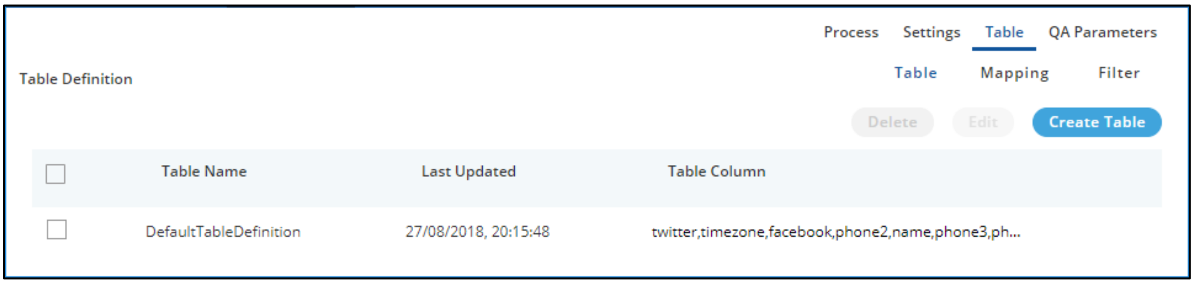


Figure: Table

It contains the following tabs.

1. Table
2. Mapping
3. Filter

4.2.4.1 Table Definition

In this tab, you can create, edit, and delete the table definitions. After creating the table definitions here, you can use "Mapping" tab to create the mapping and "Filter" tab to create the filters.

4.2.4.1.1 Create Table Definition

Administrator needs to follow below steps for creating new data table.

1. Click 

button. A pop-up will appear.

Figure: Create Table

2. Administrator needs to fill the following details:
   A. **System:** This contains the system ID which is taken by default.
   B. **Table Definition Name:** Enter the name of the table.
   C. **Description:** Enter the description regarding the table.
   D. **Column Definition:** Perform the following steps to add a column.
      I. Click "Add" to add a column. It shows the following row.

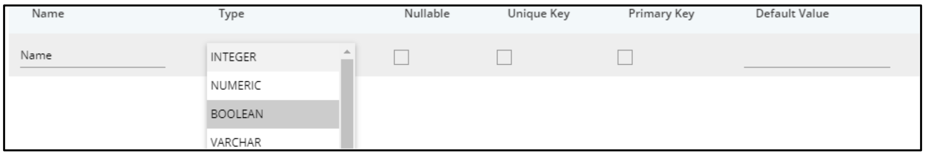


Figure: Add a column

II. Here, you have to provide the following values.

a. **Name:** Provide a name of the column.

b. **Type:** Select any of the following options to specify the type of input received in this column.

i. Integer: Select it to accept only whole numbers. It will not accept the decimals.

ii. Numeric: Select it to accept the numbers including decimals.

iii. Boolean: Select it to accept only two values that are "true" and "false".

iv. Varchar: Select it to accept the alphabets with numbers.

v. Date: Select it to accept the date.

vi. Time: Select it to accept the time.

vii. Timestamp: Select it to accept the timestamp.

c. **Nullable:** Select it to let any cell in the column to remain blank. If unchecked, it will be mandatory to enter some value in the cell.

d. **Unique Key:** Select it to let the column accept only unique values in its cells.

e. **Primary Key:** Select it to make the column primary.

f. **Default value:** Enter the default value that will be displayed in all cells of this column.

You can add multiple columns using the same steps.

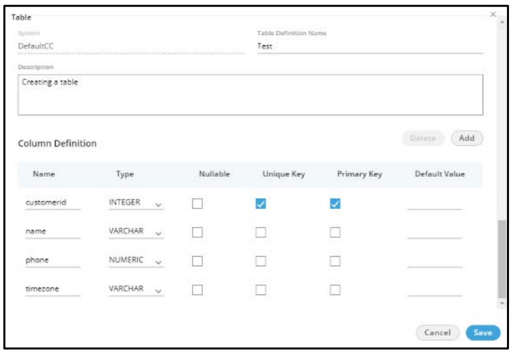
3. Following is a screenshot of a table containing different columns.
4. 

Figure: Sample Values to create a Table

5. Click **"Save"** button to create the table.

You can click **"Cancel"** button to not create the table.

Following screenshot shows a newly created table.

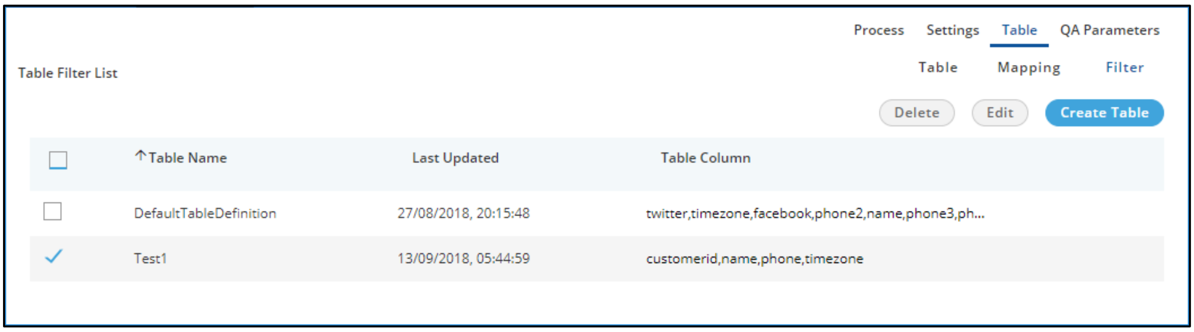


Figure: Created a Table

4.2.4.1.2 Edit Table Definition

Perform the following steps to edit the table.

1. Select a table and click "Edit".

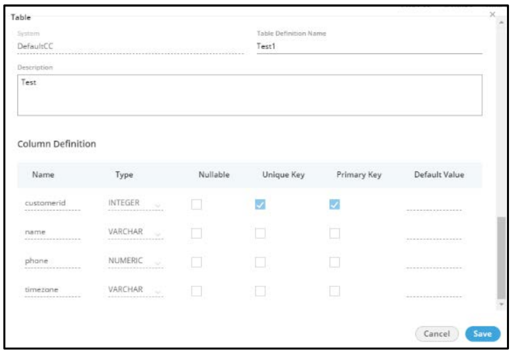


Figure: Edit a Table

2. You can change the following fields here.

   A. **Table Definition Name:** Change the name of the table.

   B. **Description:** Change the description.

   C. **Columns:** Change the following settings for columns.

      I. Nullable

      II. Unique Key

      III. Primary Key

3. Click "Save" to save and apply the changes.

You can click "Cancel" to cancel the changes.

4.2.4.1.3 Delete Table Definition

Perform the following steps to delete a table.

1. Select the table and click "Delete". It shows the following warning message.

Figure: Asking to delete a table

2. Click "Yes" to delete the selected table.

   You can click "No" to not delete the table.

4.2.4.2 Table Mapping

This tab lets you edit and delete the default existing table column mappings. You can also create, modify, and delete the custom table column mappings.

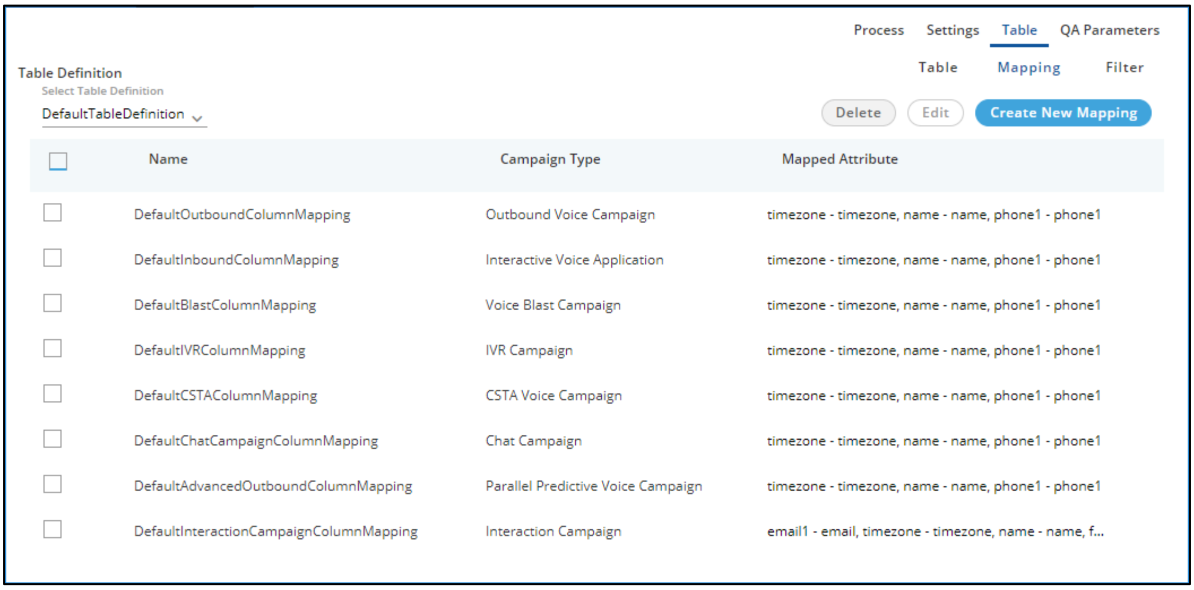


Figure: Table Mapping

Click "Select Table Definition" drop-down menu to select the table definition, in which you want to create, edit, and delete the table column mappings.

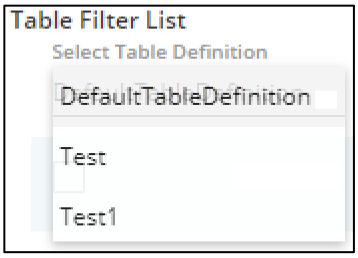


Figure: Select Table Definition

The default table column mappings are available only in "DefaultTableDefinition".

4.2.4.2.1 Create Table Mapping

Administrator needs to follow below steps to create a new mapping.

1. Click"Create New Mapping" button. Following pop-up named "Create Table Mapping Wizard" is displayed on the screen.

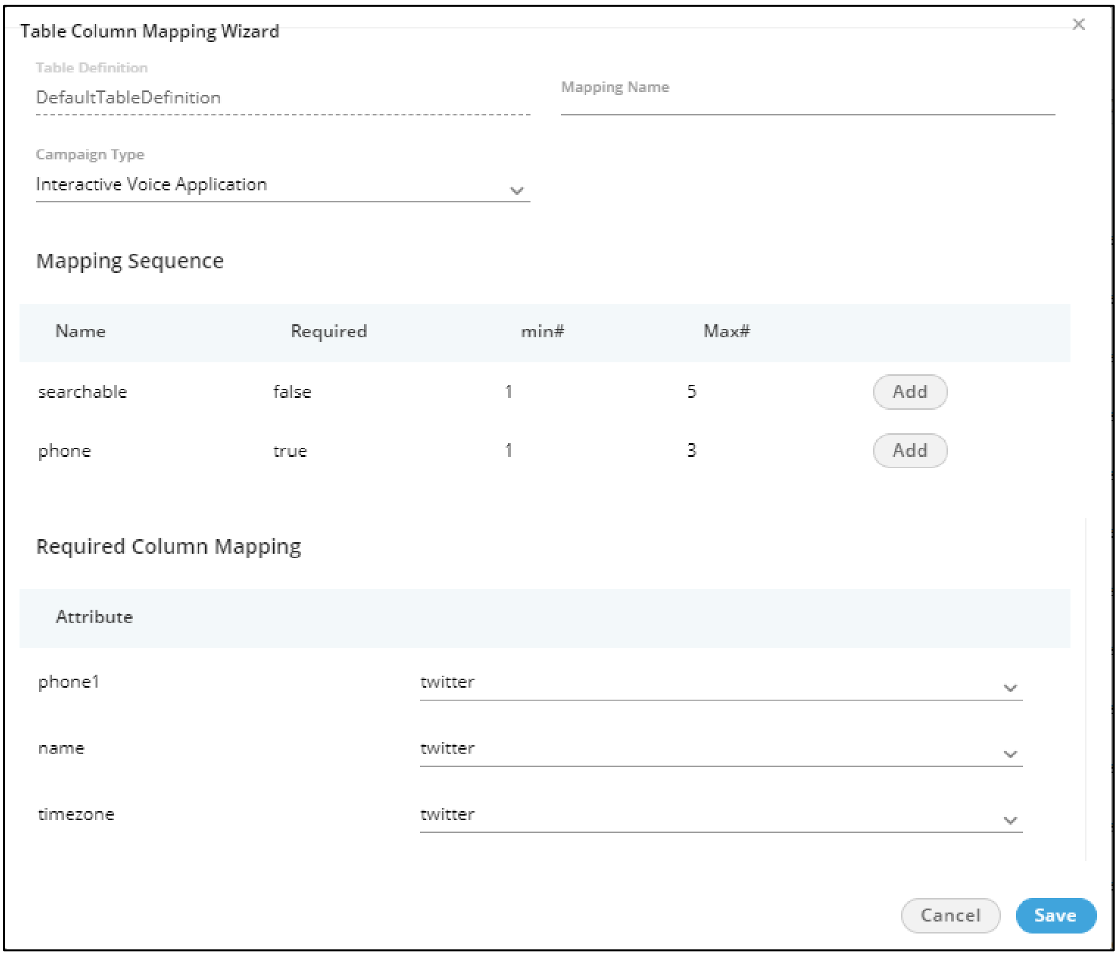


Figure: Create Table Column Mapping

2. Administrator needs to fill the following details in order to create a new mapping.
   A. **Mapping Name** :Provide a mapping name.
   B. **Campaign Type** :Select the Campaign type from the provided drop-down. It contains the following options.
      I. Interactive Voice Application
      II. Outbound Voice Campaign
      III. Interaction Campaign
      IV. Parallel Predictive Voice Campaign

V. IVR Campaign

VI. Voice Blast Campaign

VII. Chat Campaign

C. **Mapping Sequence :**By default, the following two mapping sequences are displayed here.

I. **searchable:** It lets you add the searchable and optional columns in the mapping. The user can leave these columns blank. There can be at least **one** and maximum **five** searchable columns.

II. **phone:** It lets you add the mandatory columns in the mapping. It is mandatory for the user to fill these columns. There can be at least **one** and maximum **three** columns.

D. You have to click "Add" for a Mapping Sequence to add its column.

You cannot edit or delete the column mappings here.

E. **Attribute :** User can select the attributes for the added column mappings. It has the following options.

I. twitter

II. timezone

III. facebook

IV. name

V. phone1

VI. phone2

VII. phone3

VIII. phone4

IX. phone5

X. email

Following screenshot shows the sample table mapping for a custom "Test1" table definition.

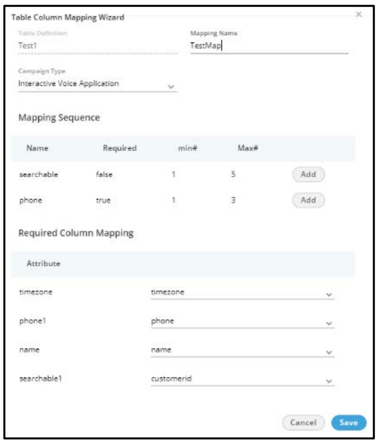


Figure: Sample Table Mapping

3. Click **"Save"** to create the table mapping.

   Alternatively, you can click "Cancel" to discard the changes.

   Following screenshot shows two newly created table mappings.

Figure: Table Mappings

4.2.4.2.2 Edit Mapping

Perform the following steps to edit a table mapping.

1. Select the table definition in "Select Table Definition" drop-down menu. The mappings of selected definition are displayed.
2. Select a table and click "Edit".

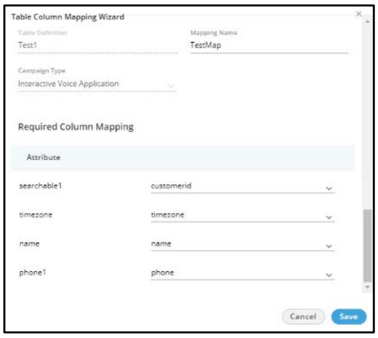


Figure: Edit a Table Column Mapping

3. You can change the following fields here.
   A. **Mapping Name:** Change the name of the mapping.
   B. **Mapping of Attributes:** You can change the mapping of attributes.
4. Click "Save" to save and apply the changes.

> You cannot change the table definition name and campaign type. Attributes cannot be added, edited, or deleted.

4.2.4.2.3 Delete Table Column Mapping

Perform the following steps to delete a table column mapping.

> It is recommended not to delete the default table column mappings available in the default table defintion (DefaultTableDefintion).

1. Select the table definition in "Select Table Definition" drop-down menu.
2. Select the mapping and click "Delete". It shows the following warning message.

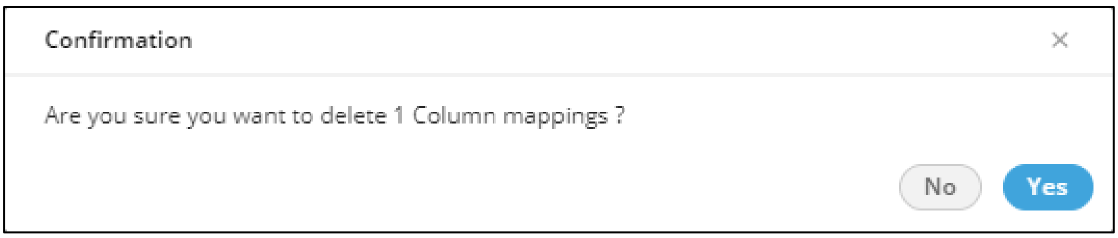


Figure: Asking to delete a Table Column Mapping

3. Click "Yes" to delete the selected mapping.

   You can click "No" to not delete the mapping.

4.2.4.3 Table Filters

Here, you can create, edit, and delete filters for the table definitions.

Table Filters are used to filter the customers in Outbound, Parallel Predictive and Voice Blast Campaigns. Administrator has to assign the required Table Filters in "Customer" Tab of any of these campaigns.Know more...

Figure: Table Filters

Click "Select Table Definition" drop-down menu to select the table definition, in which you want to create, edit, and delete the table filters.

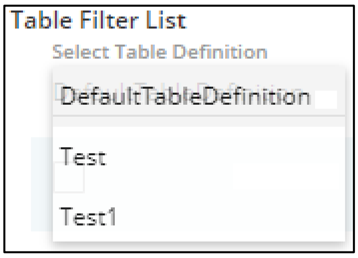


Figure: Select Table Definition

4.2.4.3.1 Create Table Filter

Administrator needs to follow below steps for creating new filters.

1. Select the table definition.

2. Click "Create New Filter" to create a new table filter.

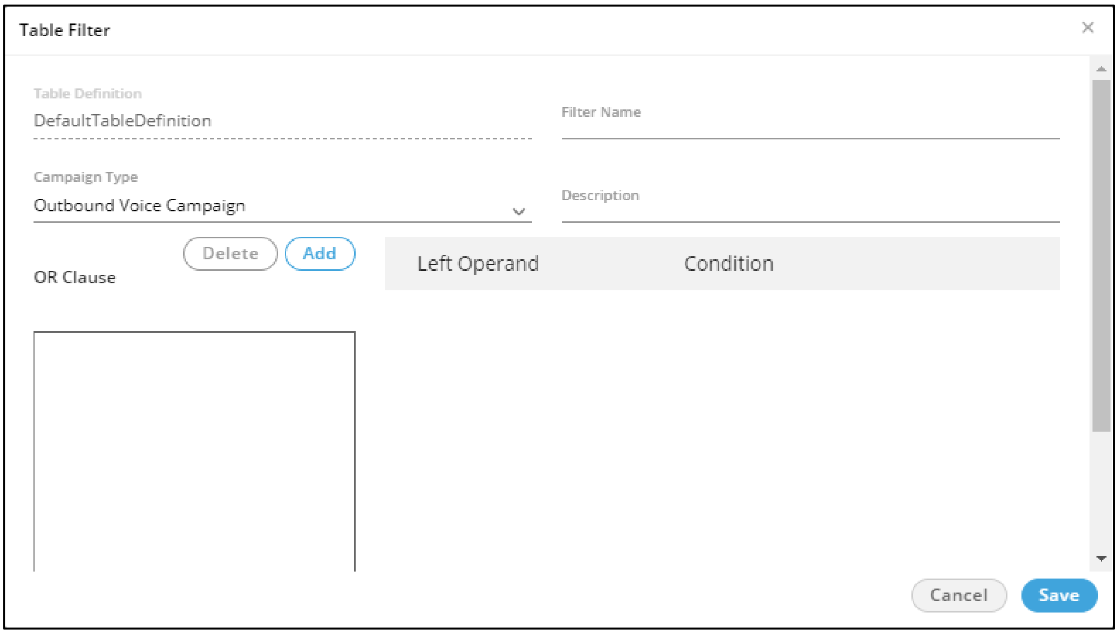


Figure: Create a Table Filter

3. Administrator needs to fill the following details in order to create new mapping.

   A. **Filter Name:** Provide a name of the filter.

   B. **Campaign Type:** Select the campaign type from the drop-down menu. It contains the following options.

      I. Outbound Voice Campaign

      II. Parallel Predictive Voice Campaign

      III. Voice Blast Campaign

   C. **Description:** Enter the description regarding the filter.

   D. Click "Add" to add a clause. Each clause has a condition to filter the table. It adds a row on the right. Perform the following steps to add a condition in a newly added clause.

      I. In a row, you can select "Left Operand" in the drop-down menu. It contains the following options.

         - ATTEMPTS

- customerid
- DISPOSITION
- email
- facebook
- IS_CALLBACK_SCHEDULED
- IS_EXCLUDED_DISPOSED
- LAST_CALL_TYPE
- LAST_CHURN_1
- LAST_CHURN_2
- LAST_DIALED_NUMBER
- LAST_DIALED_NUMBER_1
- LAST_DIALED_NUMBER_2
- LAST_DIALED_NUMBER_3
- LAST_DIALED_NUMBER_4
- LAST_DIALED_TIME
- LAST_USER_ID
- LEAD_ID
- name
- NUMBER_STATUS
- phone1
- phone2
- phone3
- phone4
- phone5
- timezone

- twitter

II. Provide a value for the selected "Left Operand" in the cell under "Condition" column.

III. You can click "+" icon on the right side of a row to add a new condition.

IV. To delete a condition, you can click "x" icon on the right side of a row.

E. You can click "Add" again to add a new clause. After adding the clause, you can add the condition rows in it.

You can click the clause names in the box located on bottom left side to navigate between the clauses.

F. To delete a clause, select it in the box and click "Delete".

Following screenshot contains the sample values to create a table filter.

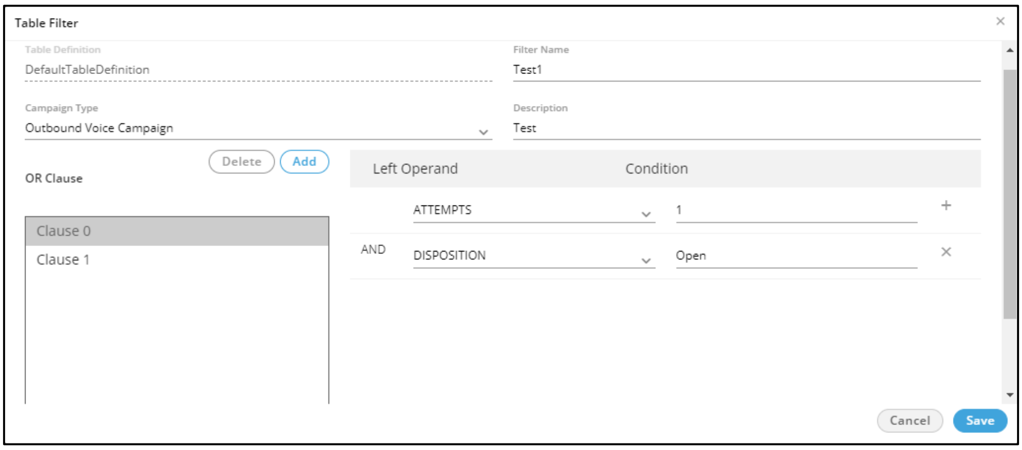


Figure: Creating Table Filter

G. Click **"Save"** button to create the table filter.

Alternatively, you can click **"Cancel"** button to not create the table filter.

You can edit and delete the table filters.

4.2.5 QA Parameters in System Configuration

Administrator can define different quality parameters which help the Administrator to rate the quality of a particular call.

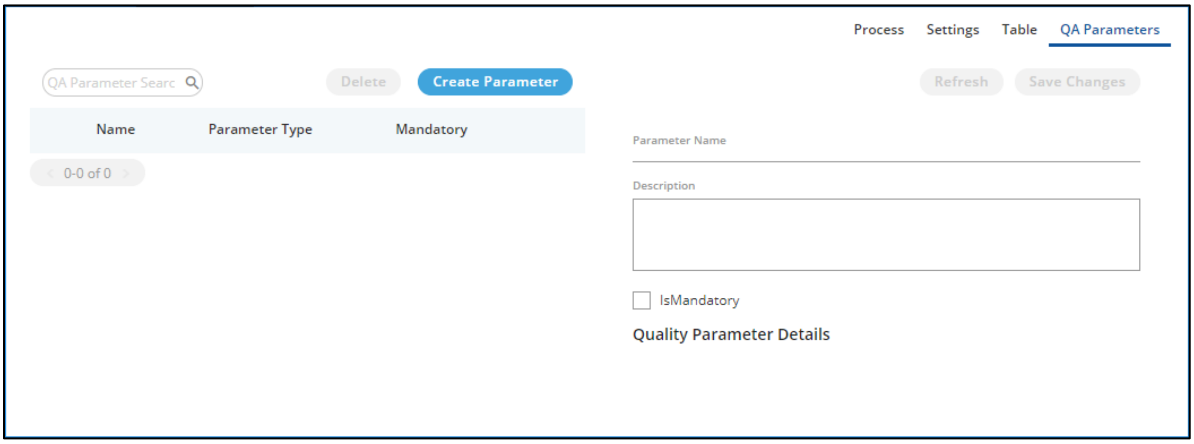


Figure: Quality Parameter Tab

Administrator can create new parameter by performing the following steps.

1. Click "Create Parameter" button. A pop-up is displayed on the screen.

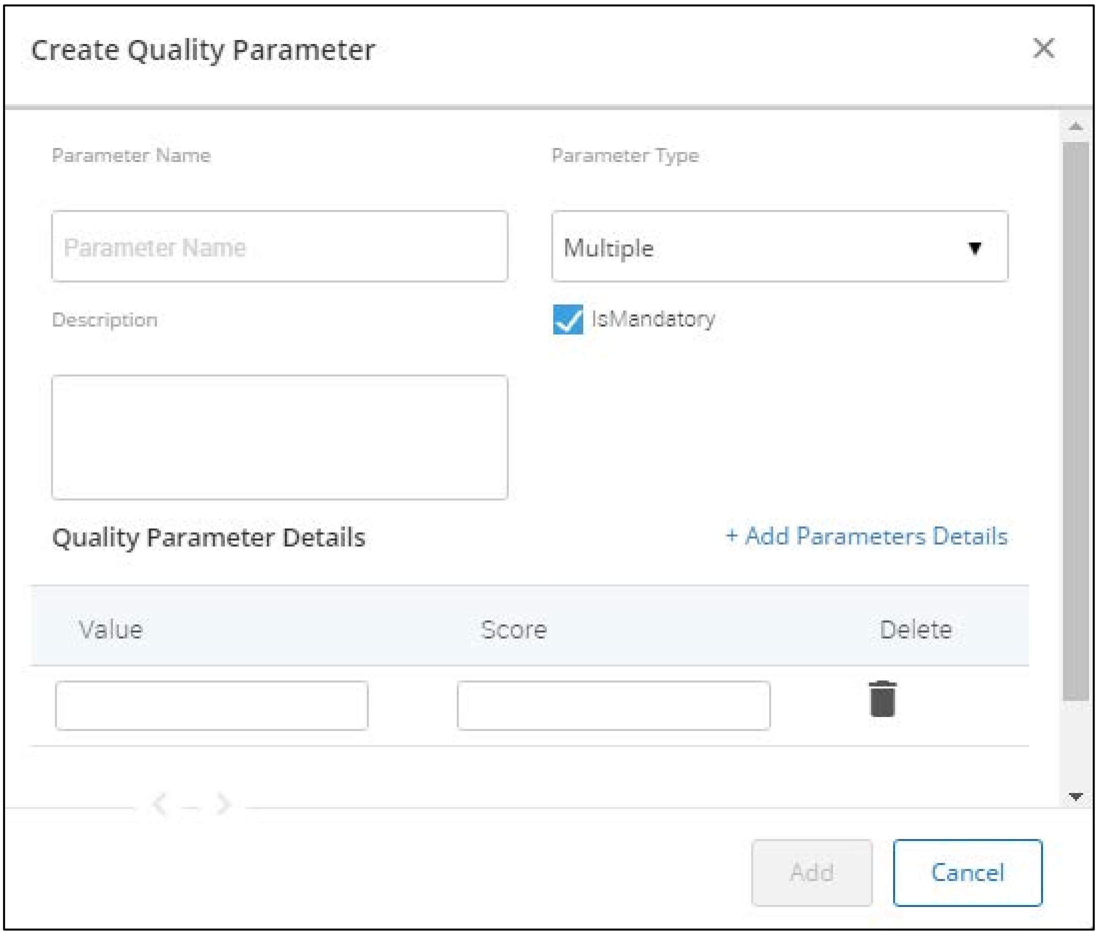


Figure: Create Quality Parameter

2. Administrator needs to fill following details.

   A. **Parameter Name:** Enter the name of parameter.

   B. **Parameter Type:** Select the parameter type from the dropdown field i.e. boolean, multiple, comment, range and add parameter details.

   C. **Description:** Enter the description of parameter.

   D. **Is Mandatory:** Check the check box if this parameter has to be made mandatory i.e. supervisor has to rate the call.

3. Click Add button to add the parameter.

   Following screenshot show a newly created parameter.

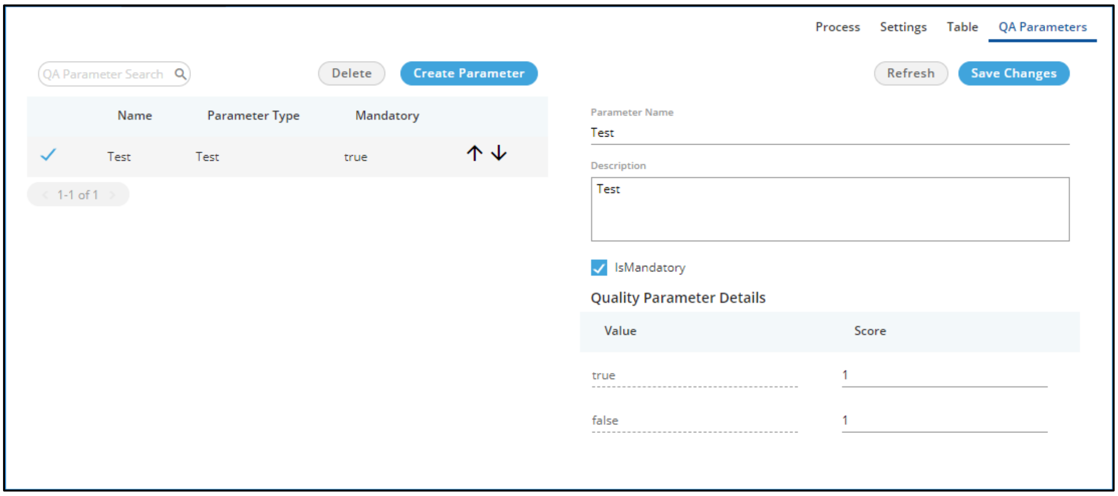


Figure: QA Parameter

4. Select the QA Parameters to view its details. You can make the changes and click 

button to save the changes.

5. Click 

button to discard the changes.

5. Users

The Administrator can create new users and delete the existing users from Ameyo system.

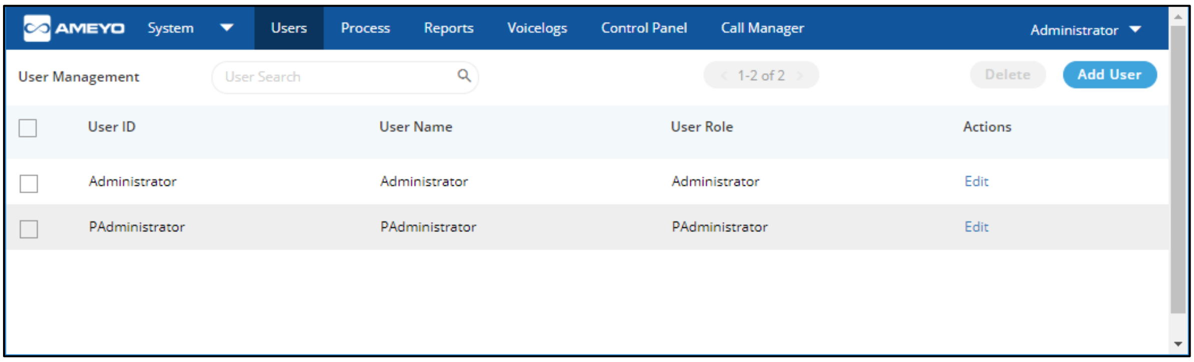


Figure: User Management

1. **<u>Add User</u>:** To add a new user, click "Add User" button.

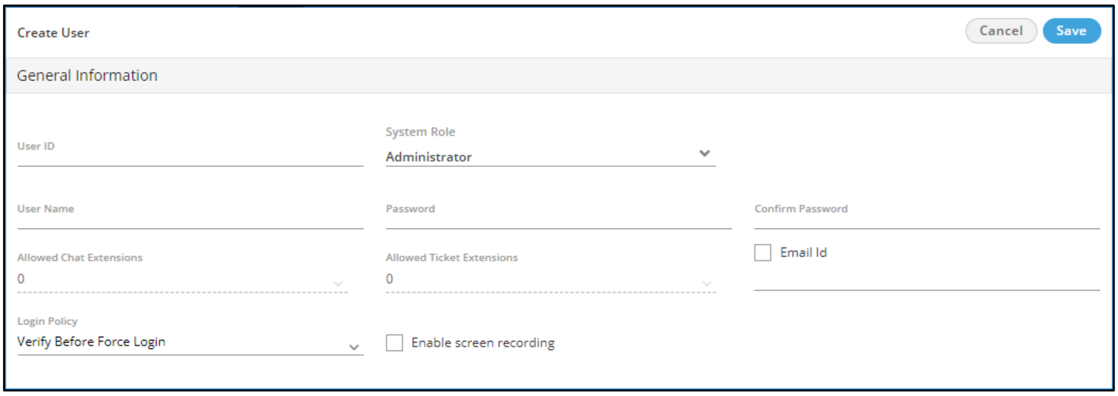


Figure: Add a User

A. Enter the User ID, User Name in the provided text boxes.

B. Select the user role from the "System Role" drop-down menu. Here, you can use the search box to search for any role. It contains the following roles.

- By default, Professional Agent, Executive, and Supervisor can work in the Ameyo System, but it can be customized further for other user roles listed here. Please contact Services Team or On-site Engineer for more information.

- A user with Professional Agent role can login to one Chat, one Interaction and one Voice campaign. However in Blended Campagin, the user with Professional Agent role can select more than one voice campaign.
- A user with Executive Role can login to one chat, one Interaction, and more than one Voice Campaigns, even if they are not Blended.
- Blended Campaigns are preferred because it gives important to the inbound calls that helps in reducing the call drops.
- Administrator
- Advisor-Agent
- Advisor-ITUser
- Advisor-Supervisor
- Analyst
- AppUser
- Blended-Agent
- BucketManager
- CloudAdministrator
- CloudAdvisor-Agent
- CloudAdvisor-ITUser
- CloudAdvisor-Supervisor
- CloudAgent
- CloudAnalyst
- CloudAppUser
- CloudCustomerManager
- CloudExecutive
- CloudExpert

- CloudPbx-User
- CloudPowerUser
- CloudProfessional-Agent
- CloudRelationshipManager
- CloudStandard-Agent
- CloudSuper-Agent
- CloudSupervisor
- CloudTeam-Lead
- CloudVoiceloggerManager
- CloudVoiceloggerAgent
- CloudWallboard-User
- CloudXchange-Admin
- CustomerManager
- Executive
- Expert
- ISBAdmin
- Manager
- Office-Agent
- PAdmin
- PAdministrator
- Pbx-User
- PolicyManager
- PowerUser
- Professional-Agent
- RegionalBucketManager

- RegionalManager
- RelationshipManager
- Standard-Agent
- Super-Agent
- Supervisor
- Team-Lead
- TenantManager
- TexoAdministrator
- TexoAdvisor-Agent
- TexoAdvisor-ITUser
- TexoAdvisor-Supervisor
- TexoAgent
- TexoAnalyst
- TexoAppUser
- TexoCustomerManager
- TexoExecutive

TexoExpert

- TexoPbx-User
- TexoPowerUser
- TexoProfessional-Agent
- TexoRelationshipManager
- TexoStandard-Agent
- TexoSuper-Agent
- TexoSupervisor
- TexoTeam-Lead

- TexoVoiceloggerAgent
- TexoVoiceloggerManager
- TexoWallboard-User
- TexoXchange-Admin
- UAM-Checker
- UAM-Maker
- UserAccessManager
- VoiceloggerAgent
- VoiceloggerManager
- Wallboard-User
- Xchange-Admin

C. Enter the password in the provided text box and confirm the password by re entering the same in "Confirm Password" text box.

D. Enter the description about the user in the provided text area.

E. Select the Allowed Interaction Extensions from the drop down field. Allowed Interaction Extension means that number of media interactions i.e. chat, mails, social media etc. can a Agent handle.

F. To enable E-mail ID for user check the checkbox provided and enter the E-mail ID of the user in the textbox.

G. **Login Policy:** Select the Login policy from the provided drop down box.

H. Click "Save" to add the user.

I. Click "Cancel" to discard the changes.

2. **Delete User:** Perform the following steps to delete the user.

   A. Select the user to be deleted by checking the checkbox.

   B. Click "Delete" to delete the selected user.

3. **Edit User:** Administrator can edit the general information of user and also change different privileges given to that particular user. To edit a particular user, select that user by checking the checkbox provided and click on edit option which is there in front of the name of that user. There are following information which needs to be edited:

   A. **General Information:** Under this category, general information such as User Name, User ID, Password, etc. can be edited.

   B. **Campaign Masked Privileges:** The administrator can restrict some action for particular user and campaign (in which respective user is assigned) by simply checking the respective checkboxes. Following privileges can be restricted for any user:

      - Manual Dial
      - View disposition of a call
      - Listen to self campaign voice logs

   C. **Voice Mail Configurations:** This feature is licensed. This tab will be only visible if voicemail license is procured at the center.
   The Administrator can enable Voicemail feature at system level is enabled by sliding the "voicemail" bar towards right. If this is not enabled, then voicemails will not be recorded. To enable sending the voicemails notifications, administrator needs to check the "Notification Email IDs" checkbox.

      - **Notifications Email IDs:** Administrator can enter the multiple email ids (gmail domain only) separated by comma. For example, email1@domain.com, email2@domain.com, and others.
      - **Welcome Voicemail Prompt:** Select the welcome voicemail prompt from the drop-down field.
      - **Finish Voicemail Prompt:** Select the finish voicemail prompt from the drop-down field.

D. Click "Apply" button to save the changes.

E. Click "Cancel" to discard the changes.

6. Proces Configuration

6.1 Process Tab

This tab is used to create the campaigns under Process, manage them, and delete them. This tab contains the following sections and tabs.

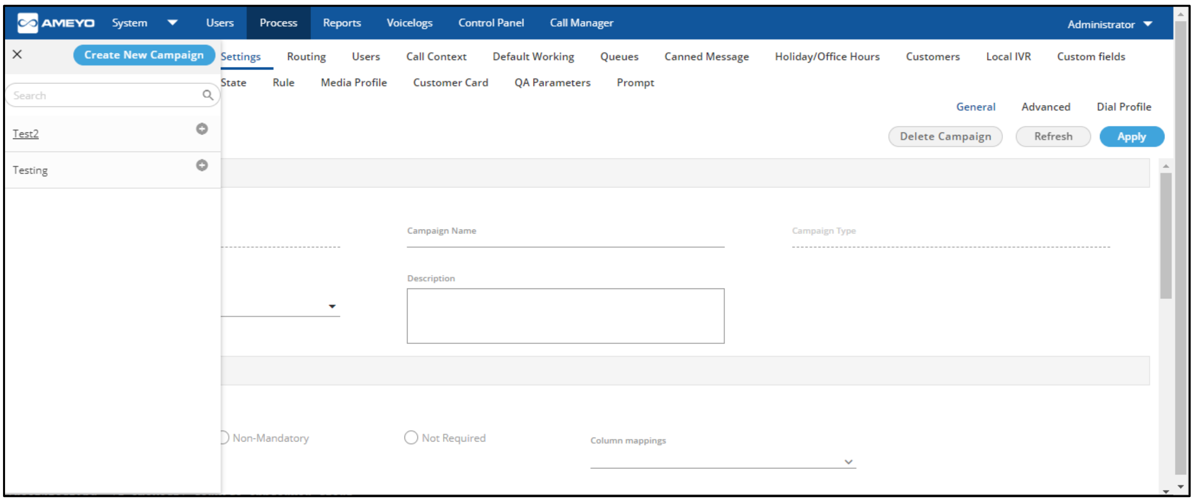


Figure: Process Tab

The interface of this tab depends upon the campaign type that you select in the left side. It's interface can be divided into the following parts.

1. **Left Navigation Section:** This is a fixed left side navigation bar that lets you browse through the different processes and campaigns. When it is not expanded or displayed, click icon to show it. When it is displayed, click "X" to close the sidebar. In this pane, you can click "Create New Campaign" button to create a new campaign and use the search box to search for any process or campaign.
2. **Tabs:** Following tabs are visible, by default, when you visit this page for the first time. However, the visibility and settings of these tabs actually depends upon the type of campaign you have selected.
   A. Settings
   B. Routing

C. Users

D. Call Context

E. Default Working

F. Queues

G. Canned Message

H. Holiday/Office Hours

I. Customers

J. Local IVR

K. Custom Fields

L. State

M. Rule

N. Media Profile

O. Customer Card

P. QA Parameters

Q. Prompt

These tabs will be discussed in detail.

6.2 Operations

Operations in "Process Tab" can be divided into the followings two categories.

1. **Process Management:** You can click the name of any process in the Left Side Navigation Bar to access its settings, which can be configured. Know more...
2. **Campaign Management:** Here, the Administrator can create, edit, and delete the campaign. A campaign is required to setup the Contact Center.
   A. **Create Campaign**
   B. **Interface of Process Tab for Different Campaigns**

C. **Delete a Campaign**

6.3 Process Settings

6.3.1 Process Settings

You can click a process name in the left navigation bar to view the settings of this process.

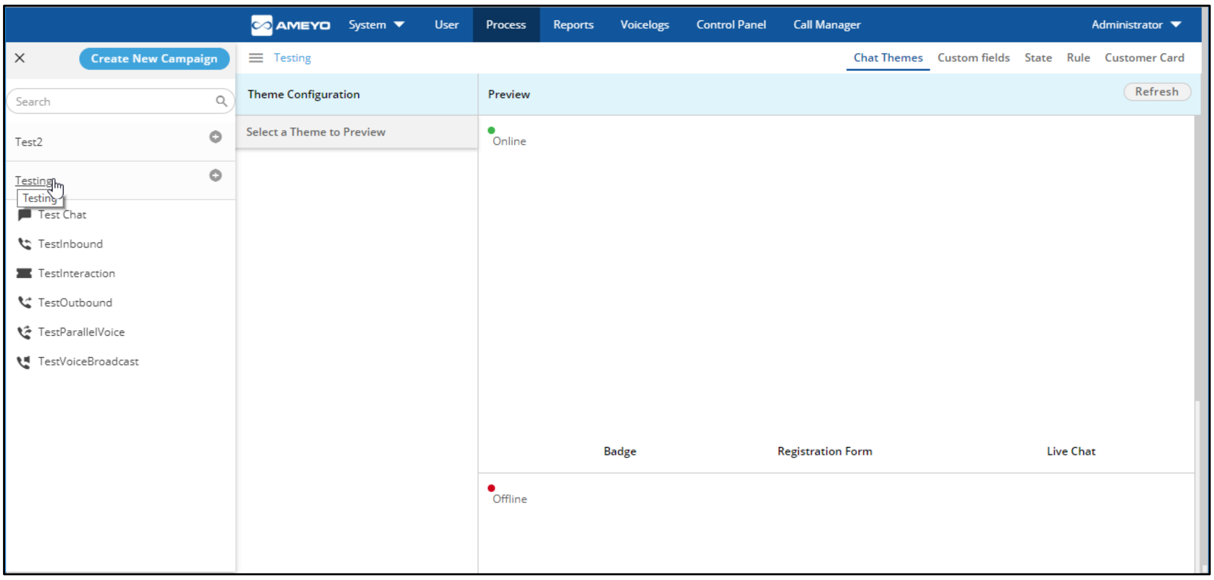


Figure: Process Settings

The Settings of a Process contains the following tabs. Click the links to know more about them.

1. **Chat Theme**
2. **Custom Fields**
3. **State**
4. **Rule**
5. **Customer Card**

6.3.2 Chat Theme Tab in Process Settings

This tab allows the creation of the customized themes for the Web Chat. You have to configure it through the different APIs, which are provided by default within Ameyo Server 4.3. Using the parameters provided here, any API can be called to perform its designated operation.

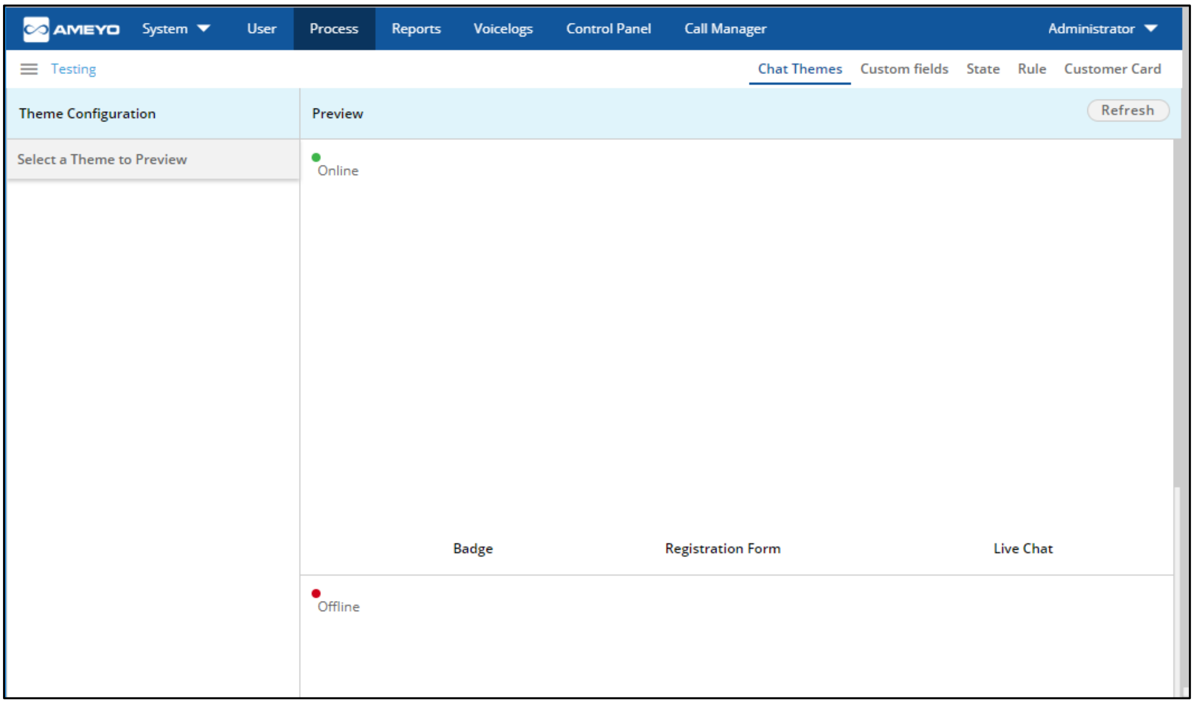


Figure: Chat Themes Tab

This tab and the "Default Chat Theme" will remain disable until a Customized theme is added.

6.3.2.1 Parameters

Before going to the APIs to perform the theme operations, it is required to go through the parameters and their values, which will be required to call the API to perform any option. Here, parameters are given in the following hierarchy.

Theme Configuration → Component → Property → Value

-
- **DEFAULT_REGISTRATION_FORM:** It is the registration form to start the chat. It has the following components.
  - HEADER: It lets you modify the header in the form.

    - TEXT: It lets you modify the text in header. It accepts the value in text format.
    - COLOR: It lets you modify the color of header in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - TEXT_COLOR: It lets you modify the color of text in the header in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
- INPUT_FIELD: It lets you modify the formatting of the input field in the form.
    - TEXT_COLOR: It lets you modify the color of text in the Input Field in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
- BUTTON: It lets you modify the formatting of the button in the form.
    - COLOR: It lets you modify the color of button in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - TEXT_COLOR: It lets you modify the color of text in button in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - SHAPE: It lets you modify the shape of the button. It accepts the value as cornered or rounded.
- SUCCESS_MESSAGE: It lets you modify the formatting of the success message.
    - COLOR: It lets you modify the color of the text in the success message. It accepts the value in rgba(<number>,<number>,<number>,<number>).
- ERROR_MESSAGE: It lets you modify the formatting of the error message.
    - COLOR: It lets you modify the color of the text in the error message. It accepts the value in rgba(<number>,<number>,<number>,<number>).
- BACKGROUND: It lets you modify the background ffffffin the form.

        - COLOR: It lets you modify the color of the background in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).

-
- **DEFAULT_OFFLINE_REGISTRATION_FORM:** It is the default offline registration form that appears when the chat is offline. It has the following components.
    - HEADER: It lets you modify the header in the form.
        - TEXT: It lets you modify the text in header. It accepts the value in text format.
        - COLOR: It lets you modify the color of header in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
        - TEXT_COLOR: It lets you modify the color of text in the header in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - INPUT_FIELD: It lets you modify the formatting of the input field in the form.
        - TEXT_COLOR: It lets you modify the color of text in the Input Field in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - BUTTON: It lets you modify the formatting of the button in the form.
        - COLOR: It lets you modify the color of button in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
        - TEXT_COLOR: It lets you modify the color of text in button in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
        - SHAPE: It lets you modify the shape of the button. It accepts the value as cornered or rounded.
    - SUCCESS_MESSAGE: It lets you modify the formatting of the success message.

        - COLOR: It lets you modify the color of the text in the success message. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - ERROR_MESSAGE: It lets you modify the error message.
        - COLOR: It lets you modify the color of the text in the error message. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - BACKGROUND: It lets you modify the background in the form.
        - COLOR: It lets you modify the color of the background in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - PLACEHOLDER: It lets you modify the text that is displayed over the input field as an introduction to the offiline registration form.
        - TEXT: It lets you modify the placeholder text in the form. It accepts the value in plain text.
        - TEXT_COLOR: It lets you modify the color of the placeholder text in the form. It accepts the value in rgba(<number>,<number>,<number>,<number>).

- **CHAT_SCREEN:** It is the main chat screen. It has the following components.
    - BACKGROUND: It lets you modify the background of the chat screen.
        - COLOR: It lets you modify the color of the background in the chat screen. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - SYSTEM_MESSAGE: It lets you modify the formatting of the system message.
        - COLOR: It lets you modify the color of the text in the system message. It accepts the value in rgba(<number>,<number>,<number>,<number>).

- CUSTOMER_MESSAGE: It lets you modify the formatting of the customer message.
    - BACKGROUND_COLOR: It lets you modify the background color of the text in the customer message.
    - COLOR: It lets you modify the color of the text in the customer message. It accepts the value in rgba(<number>,<number>,<number>,<number>).
- AGENT_MESSAGE: It lets you modify the formatting of the agent message.
    - BACKGROUND_COLOR: It lets you modify the background color of the text in the agent message. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - COLOR: It lets you modify the color of the text in the agent message. It accepts the value in rgba(<number>,<number>,<number>,<number>).
- TIMESTAMP: It lets you modify the formatting of the timestamp (given below the messages) in the chat screen.
    - COLOR: It lets you modify the color of the timestamp. It accepts the value in rgba(<number>,<number>,<number>,<number>).
- FOOTER: It lets you modify the formatting of the footer.
    - COLOR: It lets you modify the color of the footer. It accepts the value in rgba(<number>,<number>,<number>,<number>).
- HEADER: It lets you modify the header in the chat screen.
    - COLOR: It lets you modify the color of header in the chat screen. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - TEXT_COLOR: It lets you modify the color of text in the header in the chat screen.

        - TEXT: It lets you modify the text in the header in the chat screen. It accepts the value as text.
    - TEXT_AREA: It lets you modify the formatting of the text area in the chat screen.
        - COLOR: It lets you modify the color of the text area.
        - TEXT_COLOR: It lets you modify the color of the text in the text area.
    - ATTACHMENT_ICON: It lets you modify the formatting of the attachment icon that is used to upload the files.
        - COLOR: It lets you modify the color of the attachment icon. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - SEND_ICON: It lets you modify the formatting of the send icon that is used to send the messages.
        - COLOR: It lets you modify the color of the send icon. It accepts the value in rgba(<number>,<number>,<number>,<number>).

- **WELCOME_SCREEN:** It is the welcome screen of chat that is displayed on the starting. It has the following components.
    - OFFLINE_BADGE: It lets you modify the formatting of the offline badge.
        - TEXT: It lets you modify the text in the badge. It accepts the value in text.
        - COLOR: It lets you modify the color of the badge. It accepts the value in rgba(<number>,<number>,<number>,<number>).
        - TEXT_COLOR: It lets you modify the color of the text in the badge. It accepts the value in rgba(<number>,<number>,<number>,<number>).
    - ONLINE_BADGE: It lets you modify the formatting of the online badge.
        - TEXT: It lets you modify the text in the badge. It accepts the value in text.

- COLOR: It lets you modify the color of the badge. It accepts the value in rgba(<number>,<number>,<number>,<number>).
- TEXT_COLOR: It lets you modify the color of the text in the badge. It accepts the value in rgba(<number>,<number>,<number>,<number>).

6.3.2.2 Get Session ID of Administrator Login Session

It is requierd to provide the session ID of the current Administrator's login while using the APIs. Get the access to the server operating system where Ameyo Server is installed and execute the following commands to get the same.

psql -U postgres
\c ameyodb
select * from user_session_history where logout_time is NULL;

Replace ameyodb with the Ameyo Database of your Ameyo Server Installation.

The Session ID of the Administrator changes with every new login. So, you have to execute the above command every time whenever the Administrator logins.

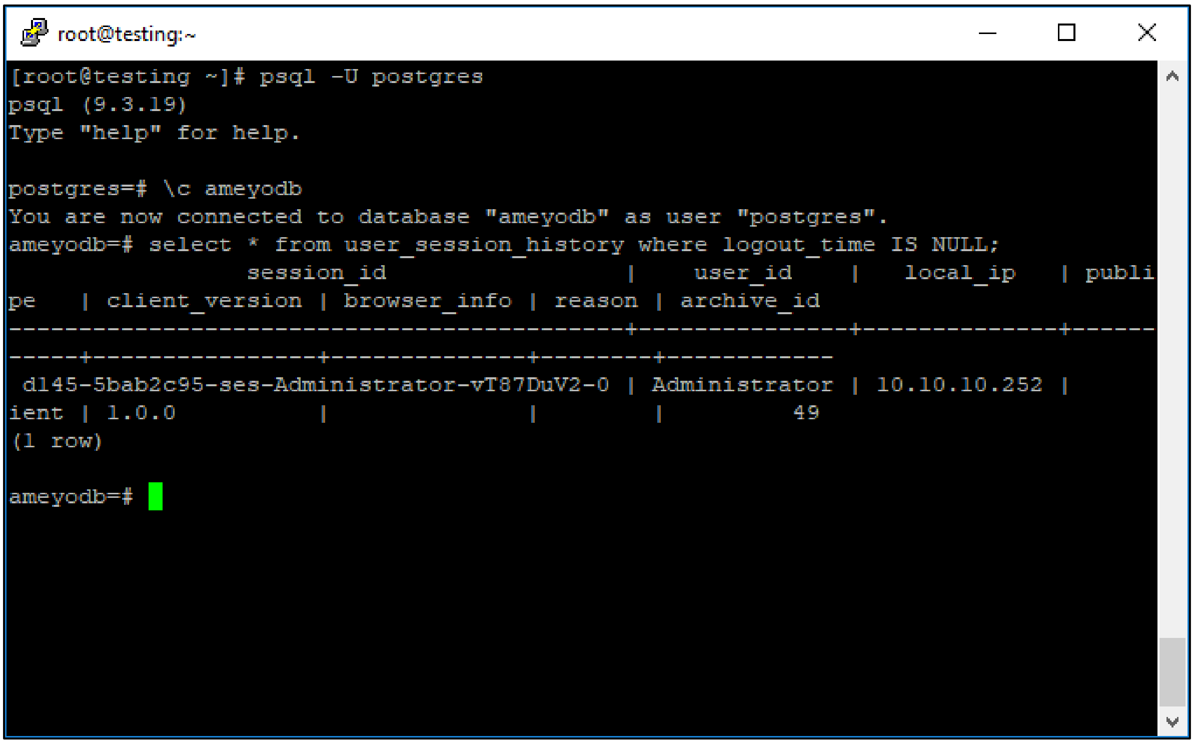


Figure: Get Session ID of Administrator's Current Login Session

6.3.2.3 Chat Theme APIs

Following operations can be performed through the APIs. Each oepration is served by a dedicated API.

1. Add Theme
2. Add Property to Theme
3. Update Theme
4. Apply Theme
5. Remove Property from a Configuration of a Theme
6. Get All Themes
7. Get Theme Configuration
8. Remove a Theme

6.3.2.3.1 Add Theme API

Following is the URL of the API to be called for adding a theme for Web Chat.

You have to replace the values in the following URL, copy it, and browse it in the same Web browser where you are logged on to Ameyo Application.

<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/dacx/jsonCommand?command=remote.processor.webchatThemeConfigurationService.addWebchatThemeConfiguration&data={sessionId:<SESSION_ID>,themeName:<NAME_OF_THEME>,isEnabled:<boolean>,webchatThemeConfigurationProperties:[{chatScreen:CHAT_SCREEN,component:<COMPONENT_NAME>,property:<PROPERTY_NAME>,value:<VALUE>}]}

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS

<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<SESSION_ID>	Session ID of the Administrator's current login session, which you have obtained through the command given above.
<NAME_OF_THEME>	Here, you have to provide a name for this new theme. It should be provided in text format.
<boolean>	true OR false
<COMPONENT_NAME>	Provide a name for the component, of which formatting you want to modify.
<PROPERTY_NAME>	Provide a name for the property of the already provided component, of which formatting you want to modify.
<VALUE>	Provide a value for the already provided property. Common property value formats are given below. • **COLOR or TEXT_COLOR:** 'rgba(<number>,<number>,<number>,<number>)' • **TEXT:** Text format • **SHAPE:** cornered or rounded.

When you execute the above command, the browser gives you a theme ID. Note it down.

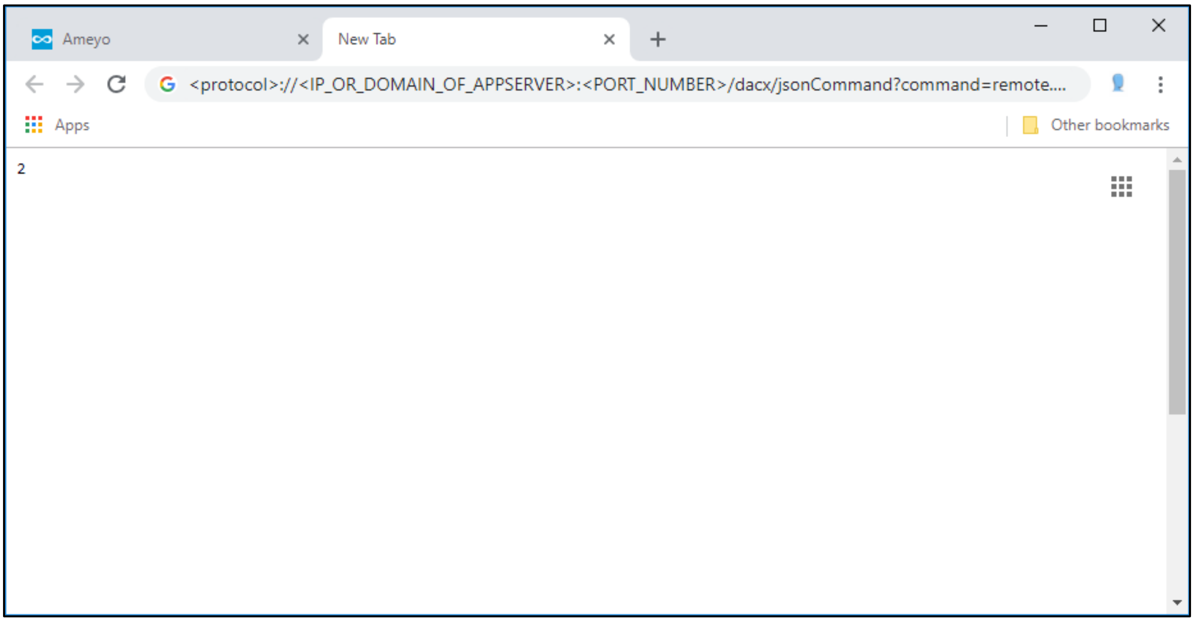


Figure: Add Theme API

"Chat Themes" tab in "Process Settings" now shows the newly added theme.

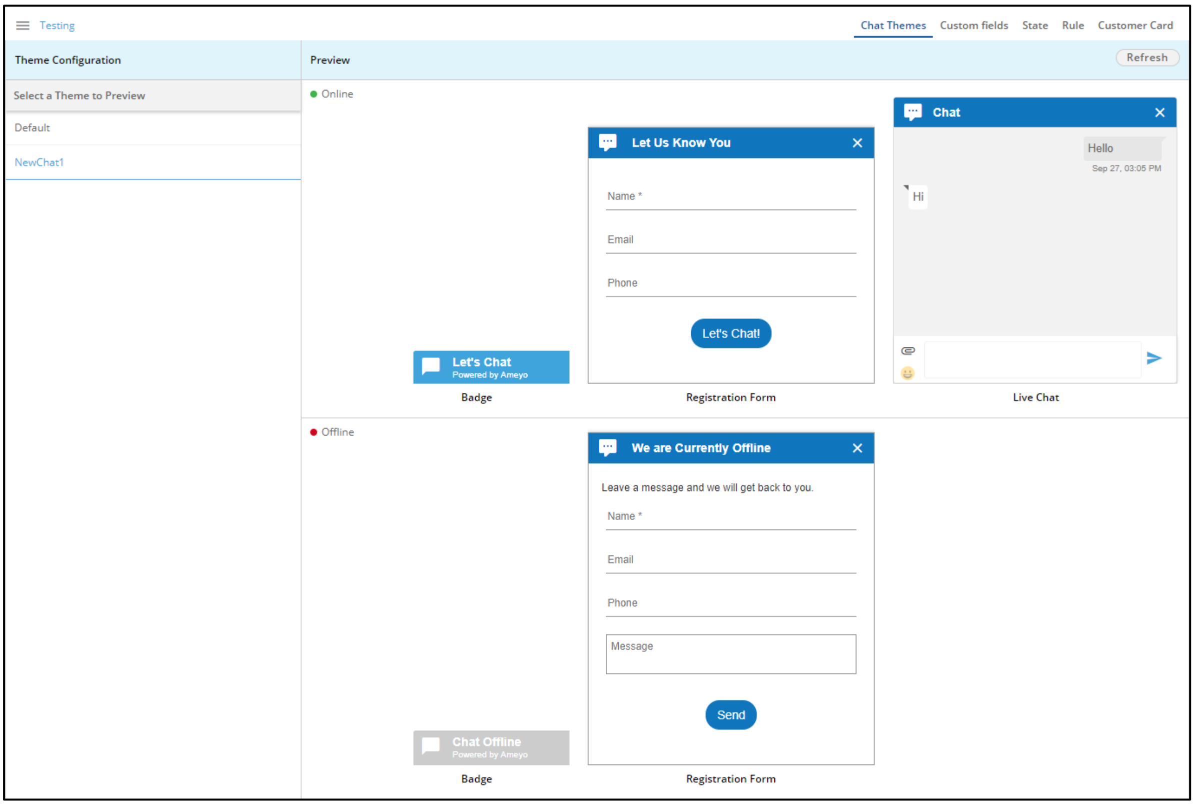


Figure: Added New Theme through API

Default Theme will also be activated with the addition of this customized theme.

6.3.2.3.2 Add Property to Theme API

Following is the URL of the API to be called for adding or modifying a property to any screen in your selected Web Chat Theme.

You have to replace the values in the following URL, copy it, and browse it in the same Web browser where you are logged on to Ameyo Application.

<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/dacx/jsonCommand?command=remote.processor.webchatThemeConfigurationService.addOrUpdateWebchatThemeConfigurationProperty&data={sessionId:<SESSION_ID>,themeId:<THEME_ID>,screen:<SCREEN_NAME>,component:<COMPONENT_NAME>,property:<PROPERTY_NAME>,value:<VALUE>}

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<SESSION_ID>	Session ID of the Administrator's current login session, which you have obtained through the command given above.
<THEME_ID>	Provide the ID of the theme that you want to modify.
<SCREEN_NAME>	Provide the name of the theme configuration that you want to modify.

<COMPONENT_NAME>	Provide a name for the component, of which formatting you want to modify.
<PROPERTY_NAME>	Provide a name for the property of the already provided component, of which formatting you want to modify.
<VALUE>	Provide a value for the already provided property. Common property value formats are given below. • **COLOR or TEXT_COLOR:** 'rgba(<number>,<number>,<number>,<number>)' • **TEXT:** Text format • **SHAPE:** cornered or rounded.

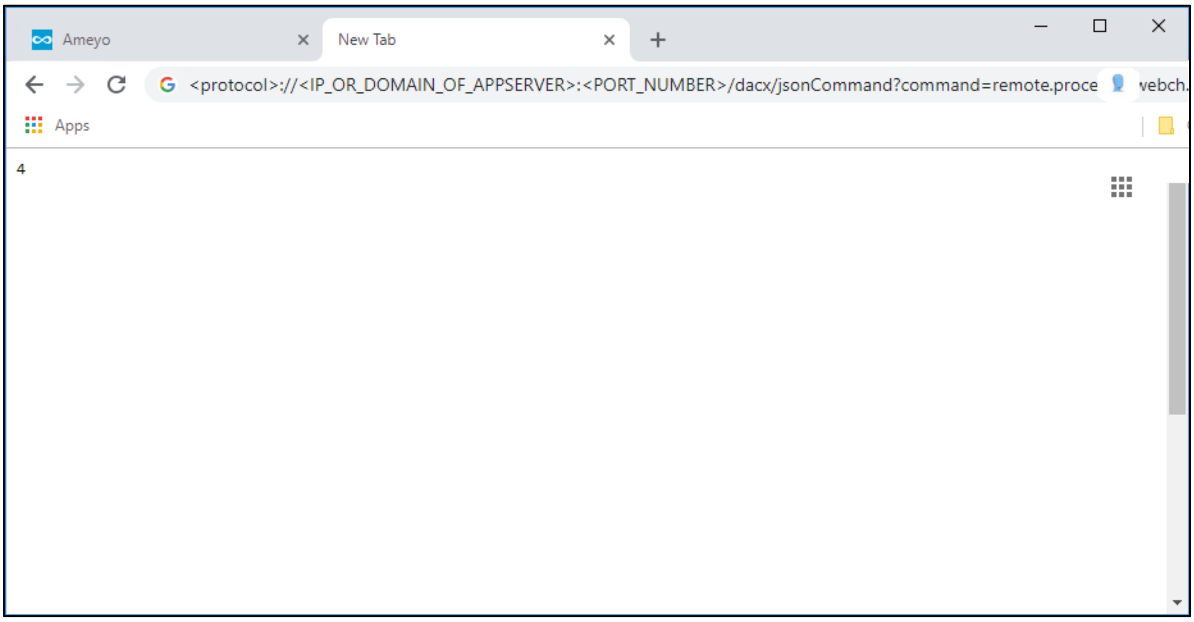


Figure: Add Property to Theme API

After executing the API, browse "Chat Theme" tab and check the theme in which you have modified the property. Press "Refresh" to update the changes, if required. Here, in this test case, the color of header of Default Online Registration Form has been changed to "Green".

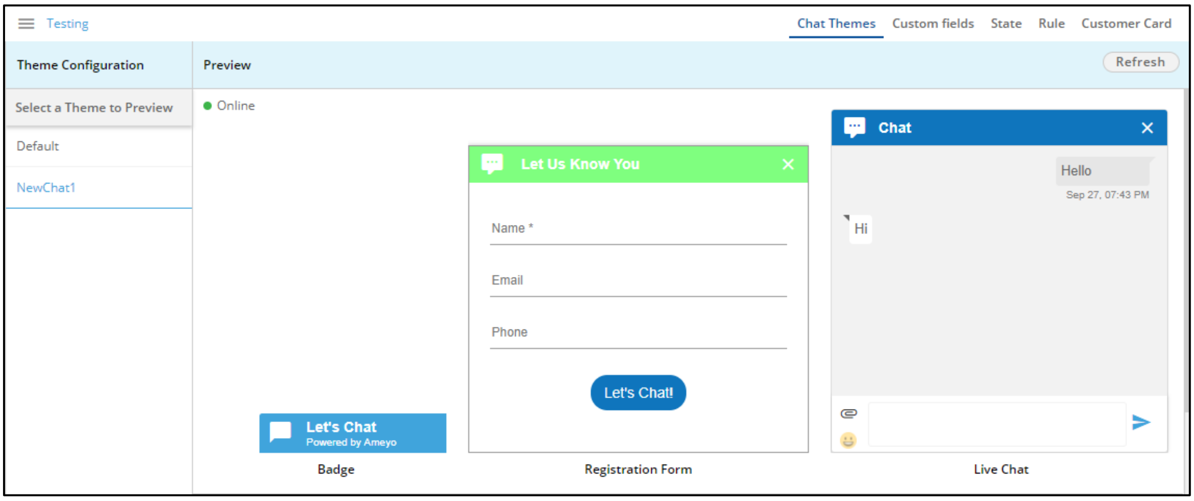


Figure: Modified Header of Registration Form

6.3.2.3.3 Rename Theme API

Following is the URL of the API to be called for renaming a selected theme.

You have to replace the values in the following URL, copy it, and browse it in the same Web browser where you are logged on to Ameyo Application.

<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/dacx/jsonCommand?command=remote.processor.webchatThemeConfigurationService.updateWebchatThemeConfiguration&data={sessionId:<SESSION_ID>,themeId:<THEME_ID>,themeName:<NAME_OF_THEME>,enabled:<BOOLEAN>}

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS

<SESSION_ID>	Session ID of the Administrator's current login session, which you have obtained through the command given above.
<THEME_ID>	Provide the ID of the theme that you want to modify.
<NAME_OF_THEME>	Provide the Name of the theme that you want to modify such as 'THEME_NAME'. (Add single quote).
<BOOLEAN>	true or false

6.3.2.3.4 Apply Theme API

Following is the URL of the API to be called for applying a selected theme on the Web Chat.

You have to replace the values in the following URL, copy it, and browse it in the same Web browser where you are logged on to Ameyo Application.

<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/ameyochatjs/test.html?campaignId=<CAMPAIGN_ID>&nodeflowId=<NODEFLOW_ID>&themeId=<THEME_ID>

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<CAMPAIGN_ID>	You have to provide the ID of the campaign, which you can get from the campaign settings.

<NODEFLOW_ID>	Provide the ID of the nodeflow where the selected Chat Theme will be applied. Execute the following commands at the server operating system where Ameyo Server is installed. psql -U postgres: to enter the PostgreSQL console. \c ameyodb: to enter the database. select * from acd_node_to_aq_mapping;: to get the information on nodeflow along with its ID.
<THEME_ID>	Provide the ID of the theme that you want to apply on the selected nodeflow in the selected campaign.

6.3.2.3.5 Get Theme Configuration API

Following is the URL of the API to be called for getting Theme Configuration.

You have to replace the values in the following URL, copy it, and browse it in the same Web browser where you are logged on to Ameyo Application.

<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/dacx/jsonCommand?command=remote.processor.webchatThemeConfigurationService.getWebchatThemeConfigurationPropertiesForThemeId&data={<SESSION_ID>,themeId:<THEME_ID>}

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS

<SESSION_ID>	Session ID of the Administrator's current login session, which you have obtained through the command given above.
<THEME_ID>	Provide the ID of the theme that you want to modify.

6.3.2.3.6 Remove Theme Configuration API

Following is the URL of the API to be called for removing a theme configuration.

You have to replace the values in the following URL, copy it, and browse it in the same Web browser where you are logged on to Ameyo Application.

<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/dacx/jsonCommand?command=remote.processor.webchatThemeConfigurationService.removeWebchatThemeConfigurationProperty&data={sessionId:<SESSION_ID>,themePropertyId:<THEME_PROPERTY_ID>}

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<SESSION_ID>	Session ID of the Administrator's current login session, which you have obtained through the command given above.
<THEME_PROPERTY_ID>	Provide the ID of the theme configuration (also called Property ID) that you want to delete. Execute the

	following commands at the server operating system where Ameyo Server is installed. psql -U postgres: to enter the PostgreSQL console. \c ameyodb: to enter the database. select * from webchat_theme_configuration_properties;: to get the ID of theme configuration.

6.3.2.3.7 Remove Theme API

Following is the URL of the API to be called for removing a theme.

You have to replace the values in the following URL, copy it, and browse it in the same Web browser where you are logged on to Ameyo Application.

<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/dacx/jsonCommand?command=remote.processor.webchatThemeConfigurationService.removeWebchatThemeConfiguration&data={sessionId:<SESSION_ID>,themeId:<THEME_ID>}

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<SESSION_ID>	Session ID of the Administrator's current login session, which you have obtained through the command given above.

<THEME_ID>	Provide the ID of the theme that you want to delete.

6.3.3 Custom Fields Tab in Process Settings

Custom Fields lets you create the custom fields and use them in the campaign.

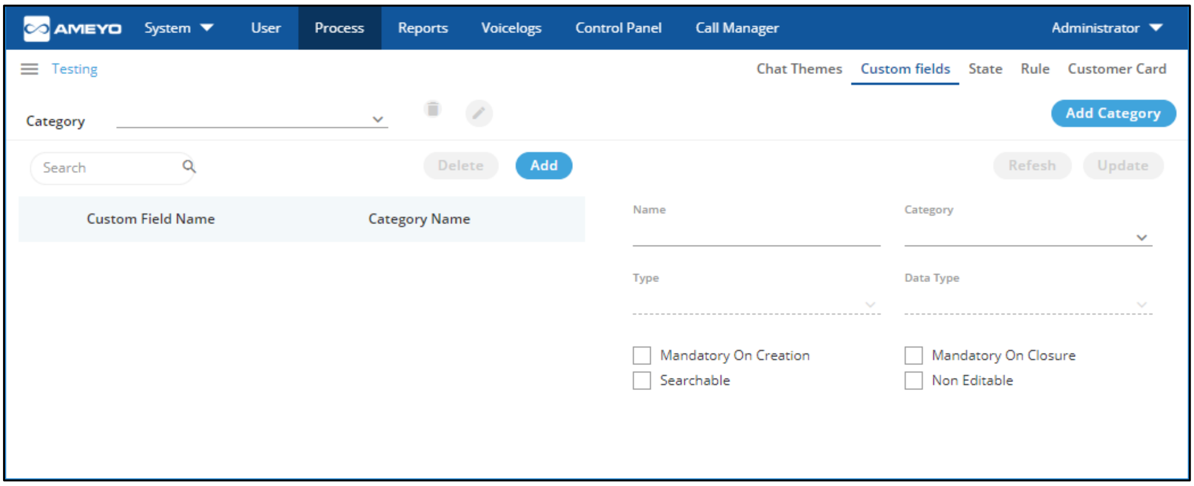


Figure: Custom Fields

You have to create a category first and then you can create the custom fields in the category.

6.3.3.1 Add a Category of Custom Fields

Perform the following steps to create a category of the custom fields.

1. Click "Add Category" button on the top left corner. It shows the following pop-up.

Figure: Pop-up to add a Category of Custom Fields

2. Provide a name for the category and click "Save".

6.3.3.2 Manage Categories of Custom Fields

You can create multiple categories by performing these steps. The added categories gets listed in "Category" drop-down menu located on the top left corner.

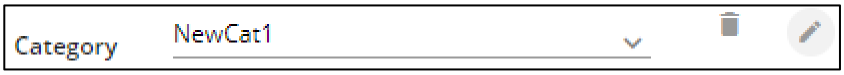


Figure: Category Drop-down menu

Here, you can select any category to perform any of the following operations.

- Add Custom Fields
- View the list of existing Custom Fields
- **Edit a Category:** After selecting a category, click to edit a category using the following pop-up.

Figure: Edit Category

Here, you can change the name of category. Click "Save" to make the changes, else click "Cancel" to discard it.

- **Delete a Category:** After selecting a category, click to remove a cartegory. The following warning message is displayed.

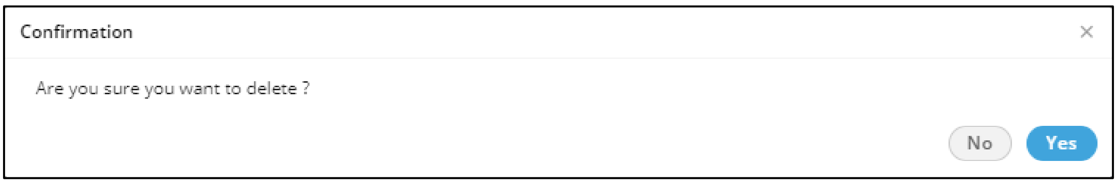


Figure: Deletion Confirmation Message

The deleted Category cannot be restored. The custom fields assigned to it will remain unassigned and you have to assign them to other category.

Click "Yes" to delete the selected category. Rather, you can click "Cancel" to keep it.

6.3.3.3 Create a Custom Field

Perform the following steps to create a custom field.

1. Click "Add" button to add a custom field using the following pop-up.

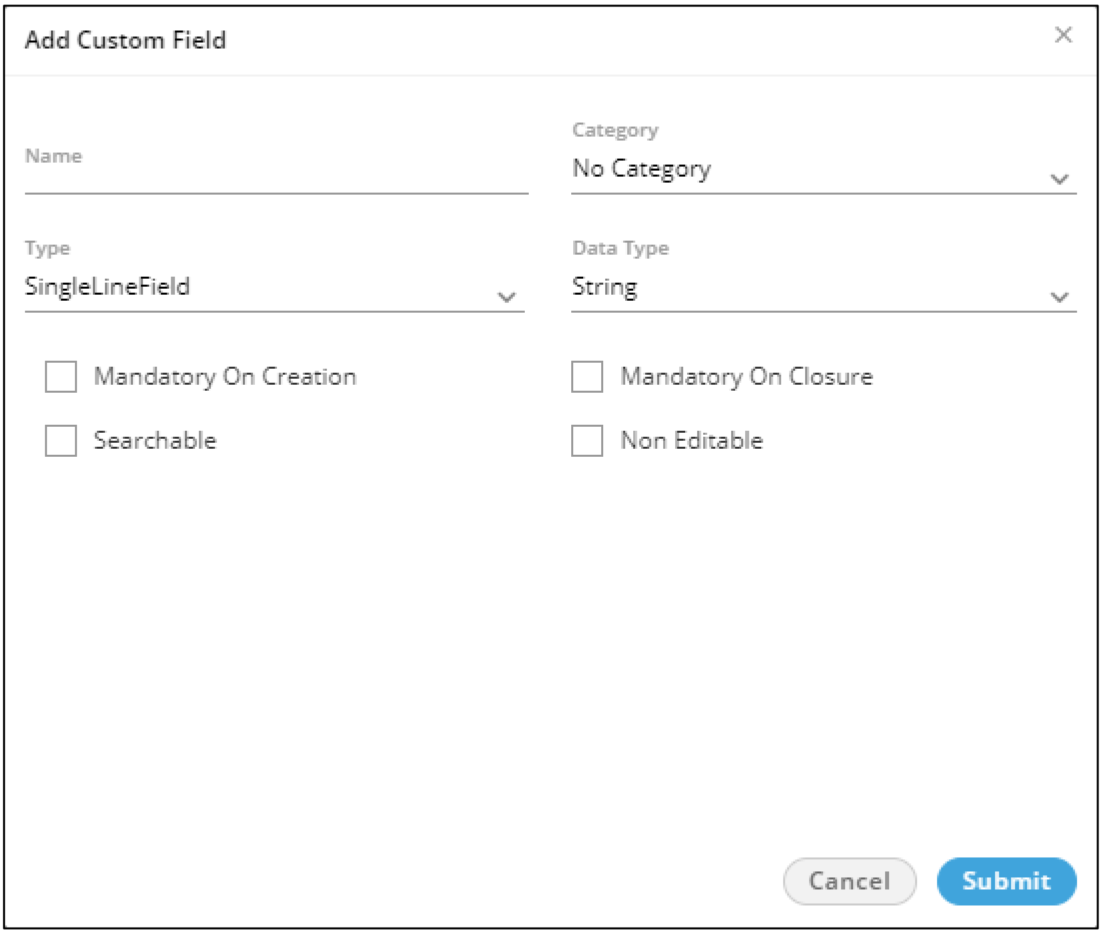


Figure: Pop-up to create a Custom Field

2. Provide a name for the custom field.
3. Select a category using "Category" drop-down menu.

4. In "Type" drop-down menu, select the type of custom field that you can to create.

   A.

   B. **SingleLineField:** Select it to create a single line custom field. You can use this to take the input in a single text line.

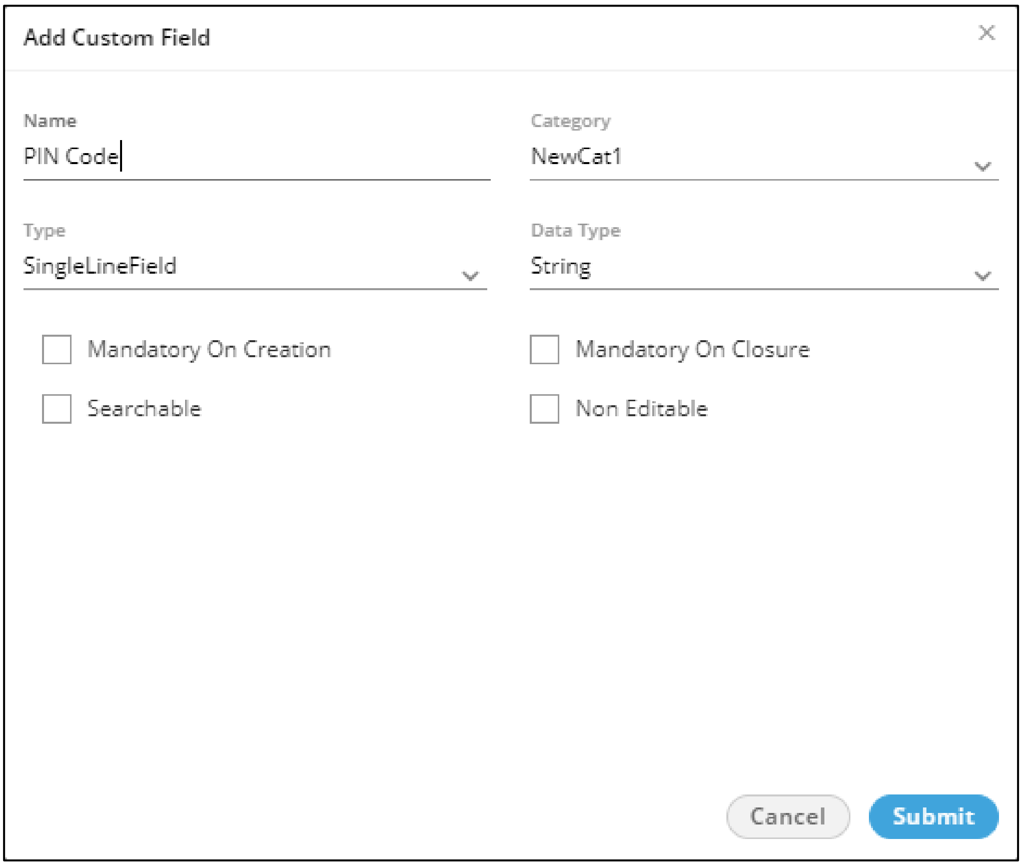


Figure: Single Line Text Field

Select any of the following data types for this field.

- String
- Integer
- Decimal

   C. **MultiLineField:** Select it to create a multiple-line custom field or a textarea. You can use this to take the input in the multiple text lines.

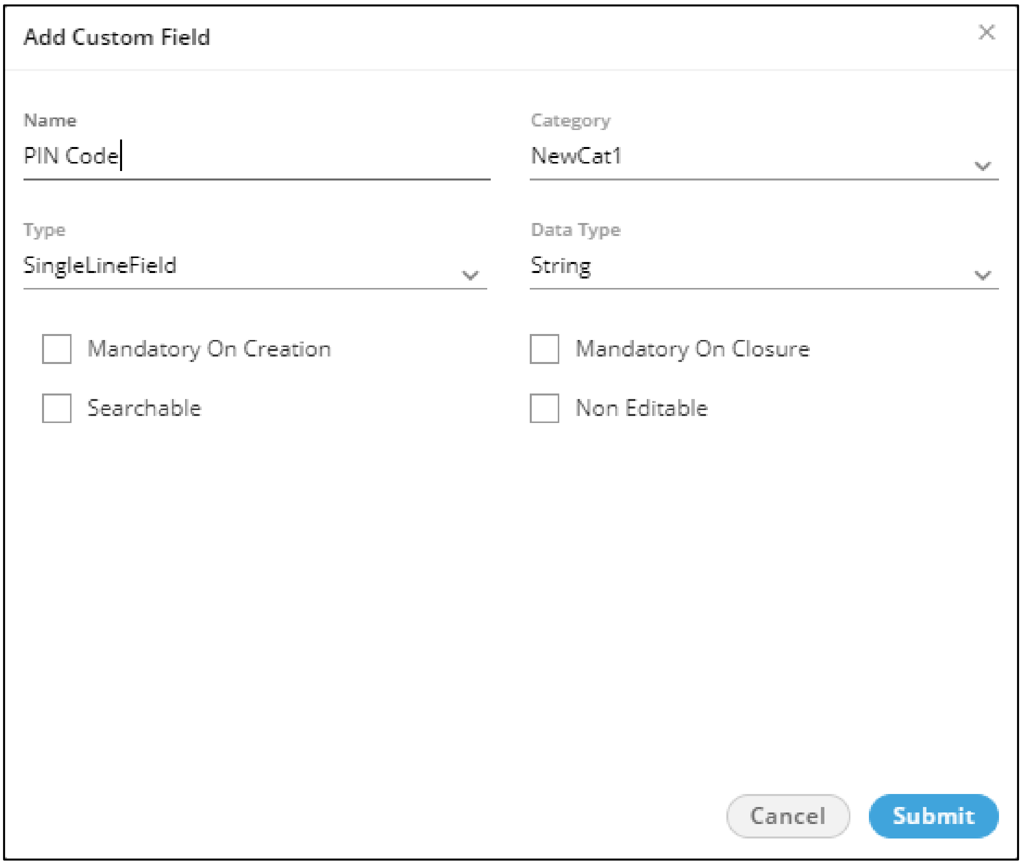


Figure: Single Line Text Field

Select "String" as the data type. It is the only available data type here.

D. **CheckBox:** Select it to create custom checkboxes. The user can select any or mutliple checkboxes. It shows "Possible Value" section in the pop-up.

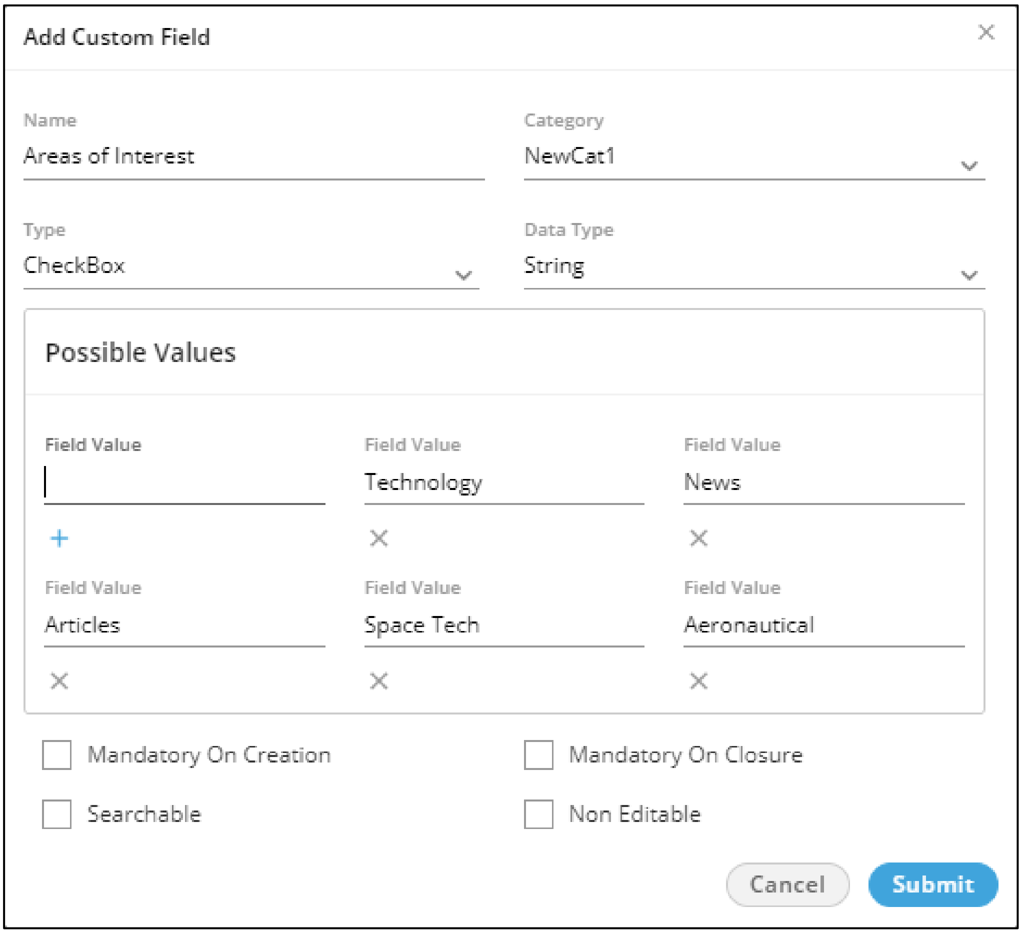


Figure: Checkboxes as Custom Fields

In "Possible Values" section, you have to provide the values for checkboxes that you want to create. In the text field, provide a value and click ⊞ icon to add this textbox. You can create mulitple check boxes to provide the multiple options of a query.

Select any of the following data types for this field.

- String
- Integer
- Decimal
- Boolean

To delete a checkbox, click "X" icon below any field value.

E. **RadioButton:** Select it to create custom radio buttons but the user can select only one of them. It shows "Possible Value" section in the pop-up.

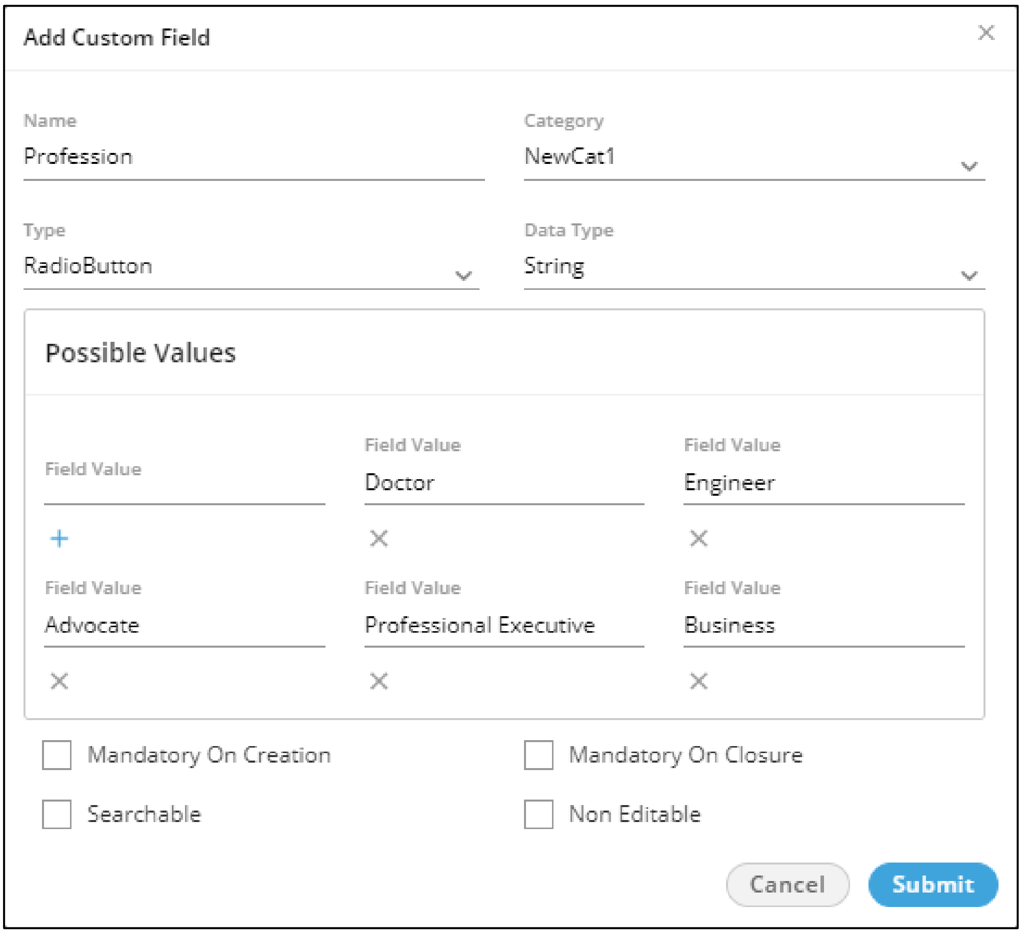


Figure: Checkboxes as Custom Fields

In "Possible Values" section, you have to provide the values for radio buttons that you want to create. In the text field, provide a value and click ⊞ icon to add this textbox. You can create multiple radio buttons.

Select any of the following data types for this field.

- String
- Integer
- Decimal

To delete a field value, click "X" icon below it.

F. **SingleSelectionListBox:** Select it to create a list containing multiple values but the user can select only one of them. It shows "Possible Value" section in the pop-up.

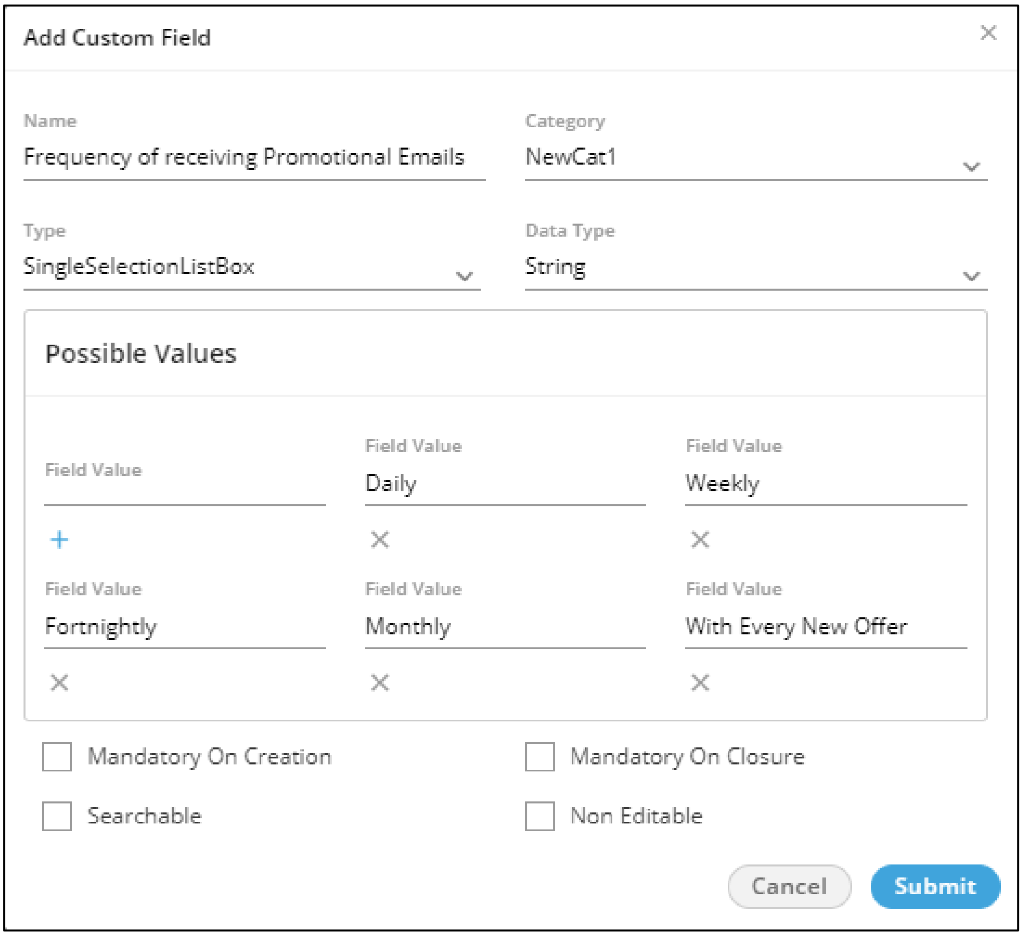


Figure: Single Selection List

In "Possible Values" section, you have to provide the values for the single selection list. In the text field, provide a value and click ⊞ icon to add this textbox. You can provide multiple values here.

Select any of the following data types for this field.

- String
- Integer
- Decimal

To delete a field value, click "X" icon below it.

G. **MultiSelectionListBox:** Select it to create a list containing multiple values. The user can select any or mutliple values.

Selecting it shows "Possible Value" section in the pop-up.

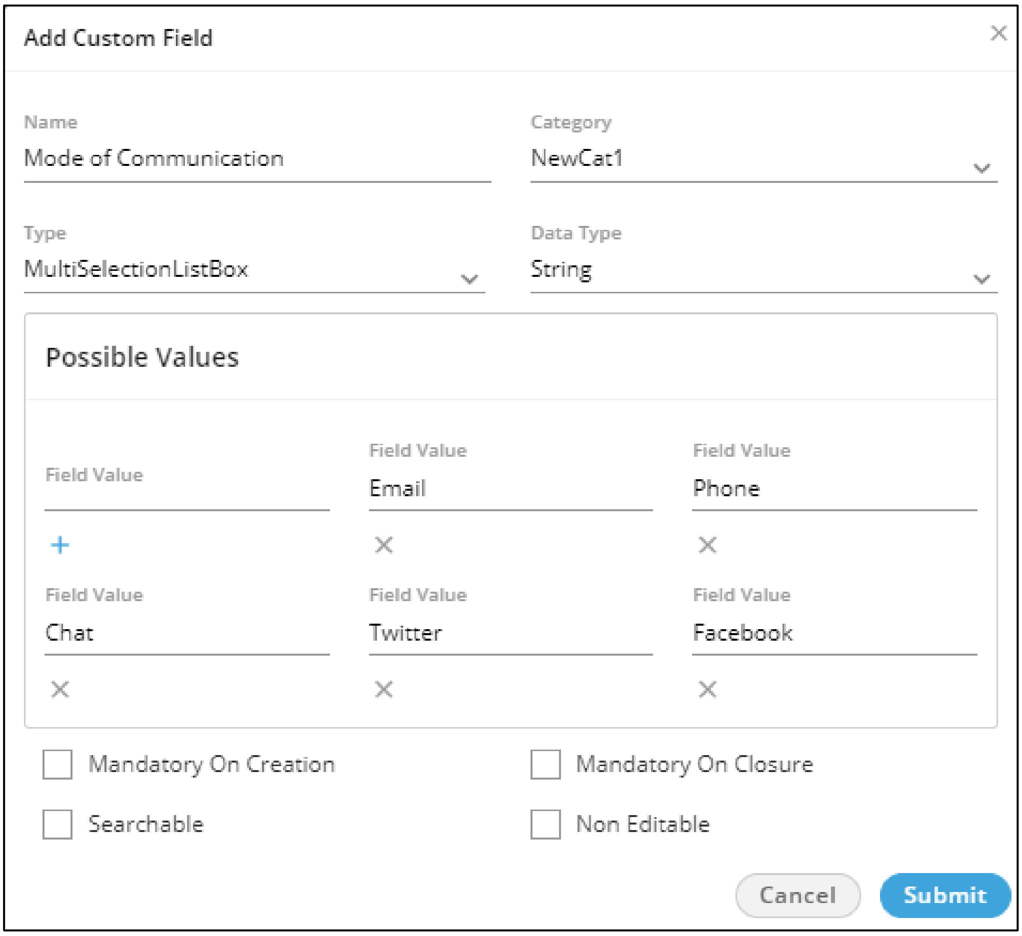


Figure: Multi-Selection List

In "Possible Values" section, you have to provide the values for the single selection list. In the text field, provide a value and click icon to add this textbox. You can provide the multiple values.

Select any of the following data types for this field.

- String
- Integer
- Decimal

To delete a field value, click "X" icon below it.

H. **DependentSingleSelectionListBox:** Select it to create a list containing values. The user has to select a value to proceed further. If multiple levels of such custom field are created, the values in the corresponding below level will be populated automatically and again the user can select only one of them.

Selecting it shows "Possible Value" section in the pop-up.

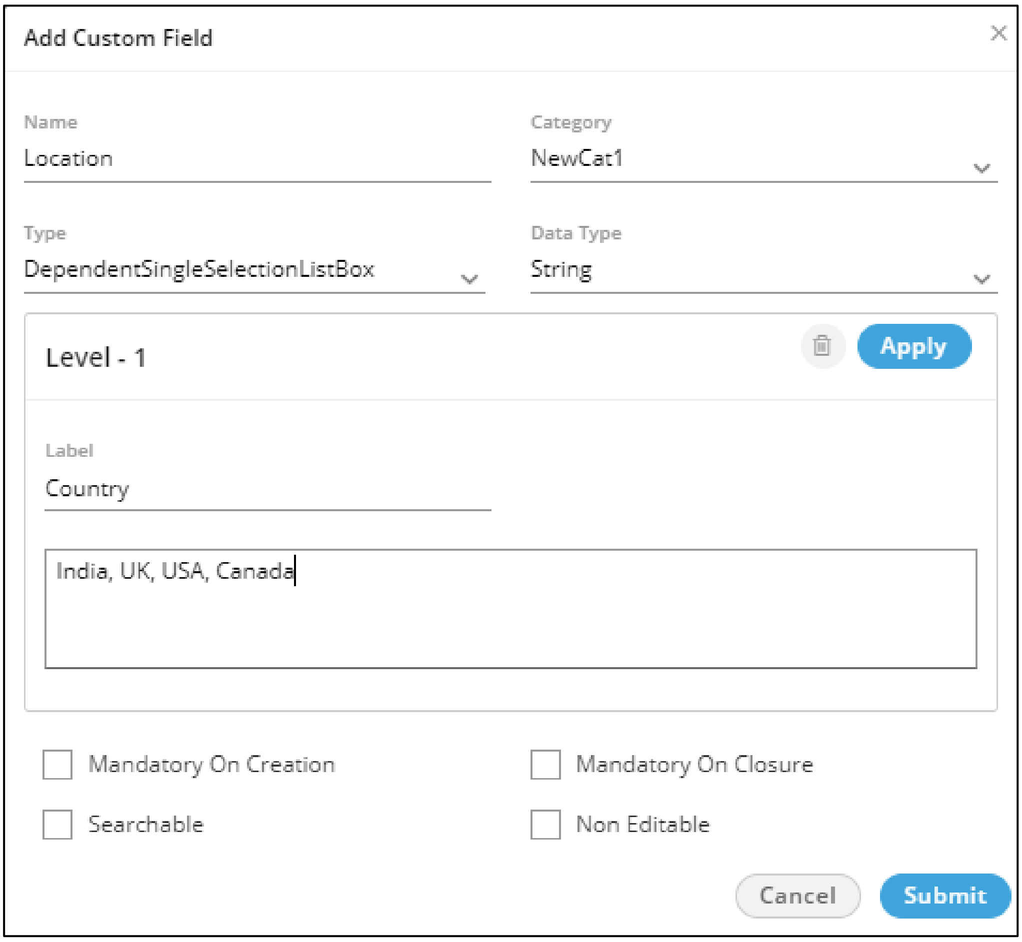


Figure: First Level of Dependent Single Selection List

Perform the following steps.

3.

A.

I. In "Possible Values" section, provide a label for the first-level of the list.

II. Type the comma separated values in the text area.

III. Now, you can click "Apply" to create the first level of the list.

IV. To create the second level list, click "Add Level" just below the first level.

V. A drop-down menu lists all values of the First Level List. You can select a First Level Value

VI. Provide a label name and enter the multiple values in the comma separated format.

VII. Click "Apply" to create the second level list.

VIII. Select another value of First Level List in the drop-down menu, provide a lable, and then enter comma-separated multiple values.

IX. Click "Apply" to save the list.

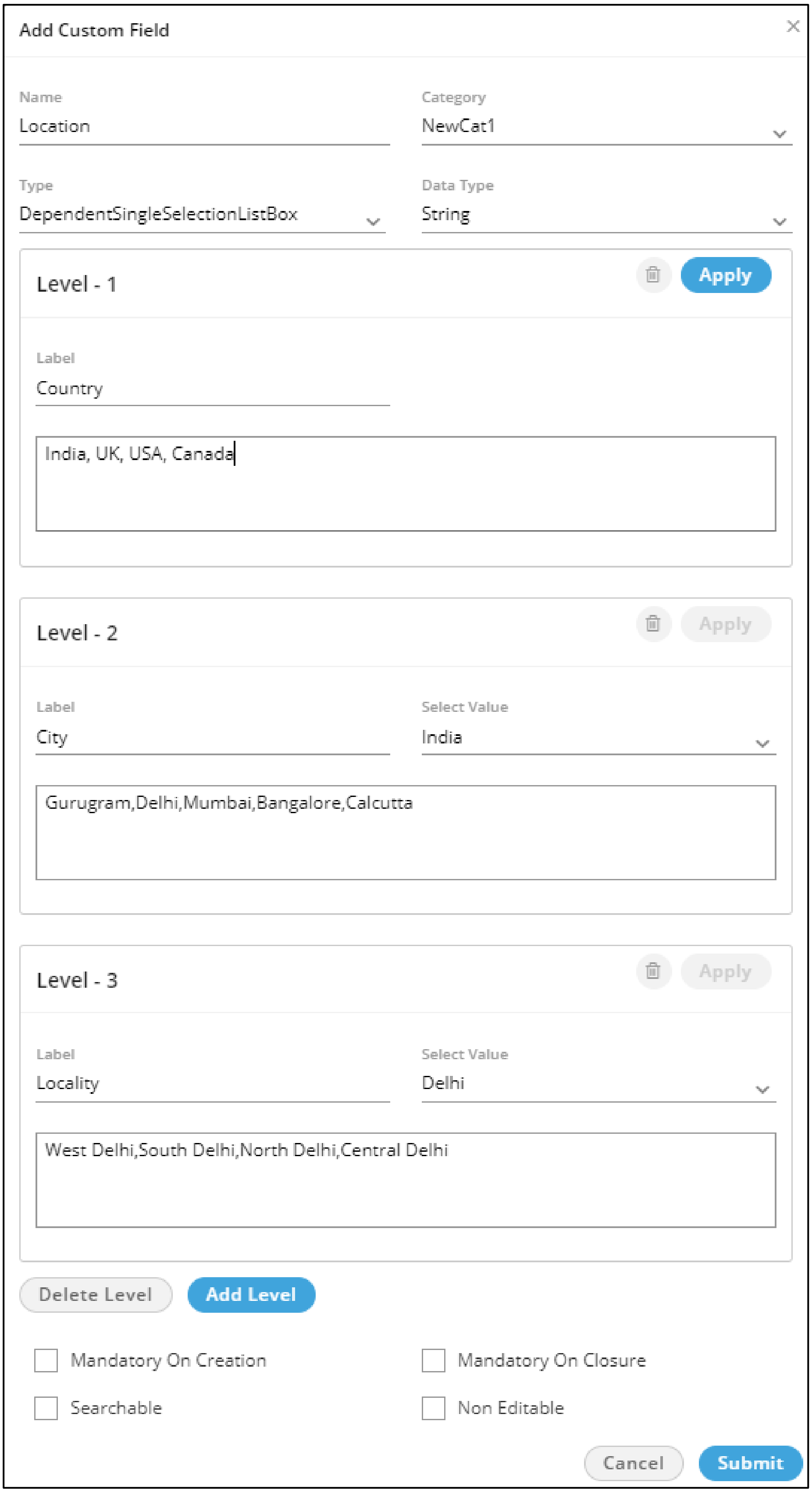

Add Custom Field
Name
Location
Category
NewCat1
Type
DependentSingleSelectionListBox
Data Type
String
Level - 1
Apply
Label
Country
India, UK, USA, Canada
Level - 2
Apply
Label
City
Select Value
India
Gurugram,Delhi,Mumbai,Bangalore,Calcutta
Level - 3
Apply
Label
Locality
Select Value
Delhi
West Delhi,South Delhi,North Delhi,Central Delhi
Delete Level
Add Level
Mandatory On Creation
Mandatory On Closure
Searchable
Non Editable
Cancel
Submit

Figure: Multiple Levels of Dependent Single Selection List

When you are in third level, you have to select the value in first level to load its corresponding values in the second level list. After selecting a value in second level, the corresponding values in the third level list will be populated.

X. You can create a nested levels of Dependent Lists to meet your requirements.

XI. Select "String" as the data type as it is the only one available data type.

To delete a list at any level, click "Delete" button for it.

B. **DateField:** Select it to create a list containing multiple values but the user can select only one of them. It shows "Possible Value" section in the pop-up.

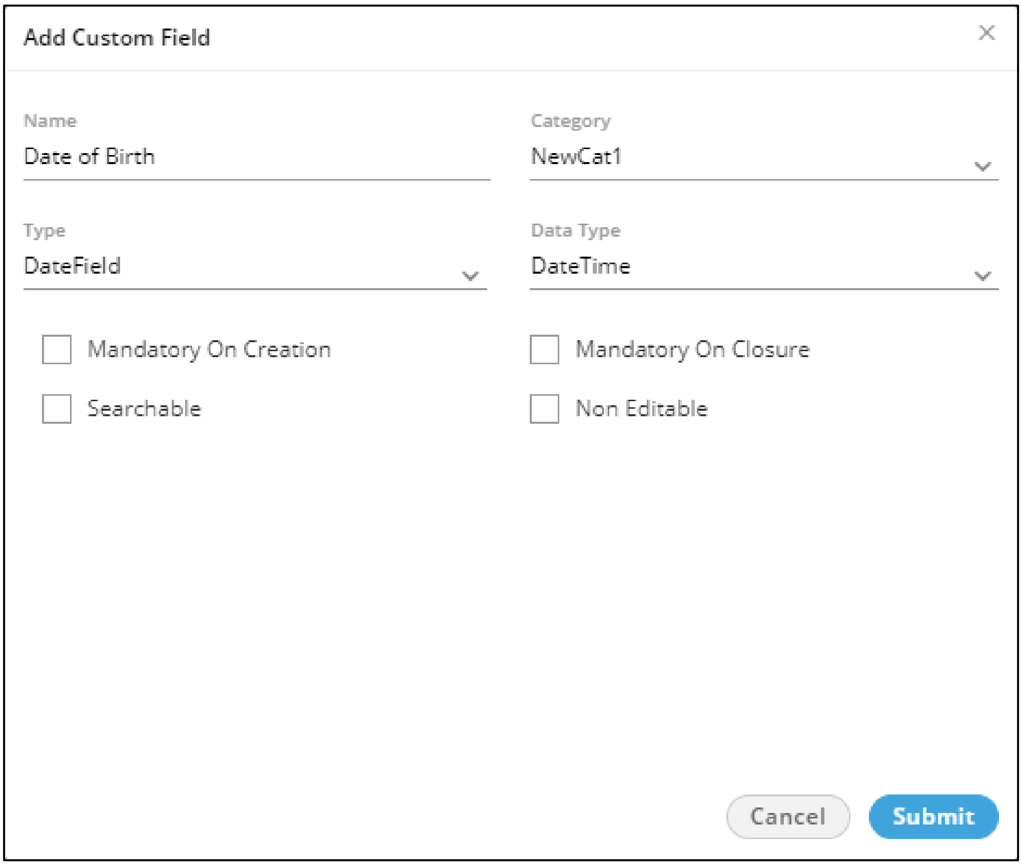


Figure: Custom Date Field

Select "DateTime" as the data type, which is the only available data type here.

4. Select any of the following options either to make the custom field mandatory either while creatingthe ticket or while closing it.
    A. **Mandatory on Creation:** Select it to make the custom field to be filled while creating the ticket.
    B. **Mandatory on Closure:** Select it to make the custom field to be filled while closing the ticket.
5. Select "Searchable" to make this field searchable. The values of this field can be searched in the system.
6. Select "Non-Editable" to make the field non-editable by the user. However, you can keep it unchecked to let the users edit it as per requirement.The created custom fields are listed in the left side.

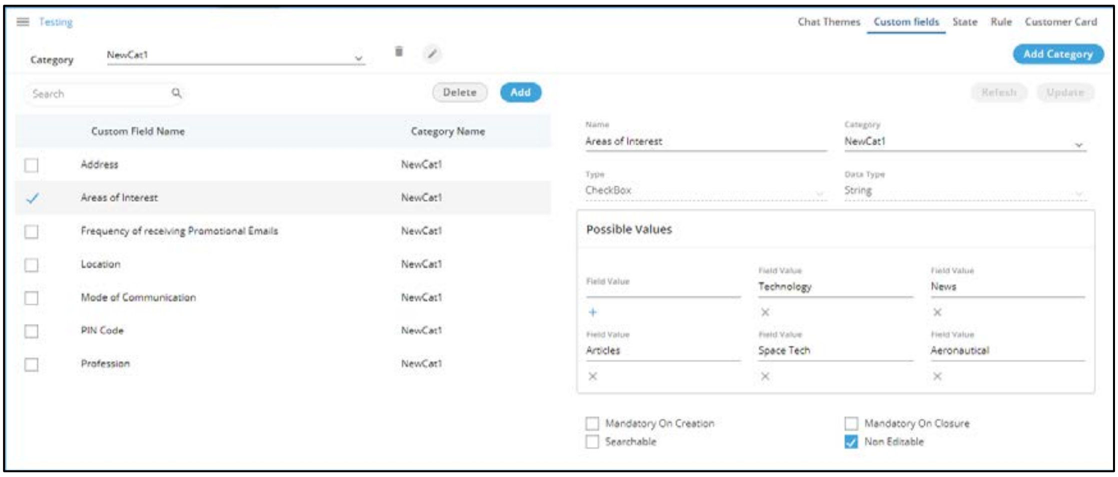


Figure: List of Custom Field

6.3.3.4 View and Modify Custom Field

Perform the following steps to view and modify the details of a custom field.

1. Click the checkbox of a custom field to select it. Its details are displayed on the right side.

2. You can change the following values here.
    - Name
    - Category
    - Add or remove possible values
    - Make it mandatory to fill either on creation or on closure of a ticket
    - Make it searchable or not
    - Make it editable or non-editable by the user
3. Click "Update" to apply the changes.

   Rather, you can click "Cancel" to discard the changes.

6.3.3.5 Delete a Custom Field

The deleted custom field cannot be restored.

Perform the following steps to delete a custom field

1. Click the checkbox of a custom field to select it.
2. Click "Delete" button to delete it. The following message is displayed.

Figure: Deletion Confirmation Message

6.3.4 State Tab in Process Settings

The two tabs - States and Rules - in Process Settings are actually to integrate PACE with the Ameyo System. PACE (Pro Active Connect Enhancer) is a customer provider. Both PACE and

Ameyo's Predictive Dialer form the PACE Solution. This customer provider is responsible for maintaining the cache from where the dialer can pick customers and dial

PACE should be used only when customer behavior is known before hand. By analyzing these behavior, some rules have to created which PACE use to increase the overall productivity.

6.3.4.1 Business Use Case 1 - Connected Success or Connected Fail Division

Suppose there is a contact center for which a CONNECTED call is SALE. There are obviously some numbers with disposition FAILED, AMD, PROVIDER_FAILURE, and other states. Since the customer behaviour and contact center requirements are known, the dialer should not dial (or dial in a less number) such customers again. But, if we use other provider than PACE, the retry time of system disposition is taken into account and such customers will be dialed again and again. It may ultimately results in loss of bandwidth and decrease in the profits.

In PACE, we can restrict such customer by defining rules as well as we can force CONNECTED numbers to dial again if the contact center demands.

6.3.4.2 Business Use Case 2 - Division as per Collection Process

It is known fact that in Collection or Sales scenarios, there is a process of converting a customer either to a "Sale Converted" Customer, a "Payment Done" Customer, or a "Procure to Pay" customer. There is a dialing strategy attached to this process, which helps the business to achieve the goal. This dialing strategy can be broken down into states that are attached to the customer as the rule gets executed.

6.3.4.3 Business Use Case 3 - Division as per the Timings to Call

The customers are not picking up the call or the customers are not reachable at around 9 AM as they might be travelling to Office. This is the information that can be used to call the customer again in the evening. The state will be OfficeTravelling and the rule will be If (SYSTEM_DISPOSITION='NO_ANSWER' OR SYSTEM_DISPOSITION ='PROVIDER_TEMP_FAILURE') then CallAroundTime='05:00:00' and NotCallBefore='04:00:00'

6.3.5 States

The customes have to be categorized by segregating them in groups. These groups are called states. A specific dialing percentage can be assigned to each state. The dialer will dial the numbers according to this precentage division.

To enable PACE in Ameyo, it is required to create the following three states.

- freshNumber
- catNumber
- ns

Make sure to select "PACE Based Customer Provider" in the settings of a Parallel Predictive Campaign to use the PACE. Know more...

"State" Tab in Process Settings allows you to create the states and assign the Dialing Percentage to each state.

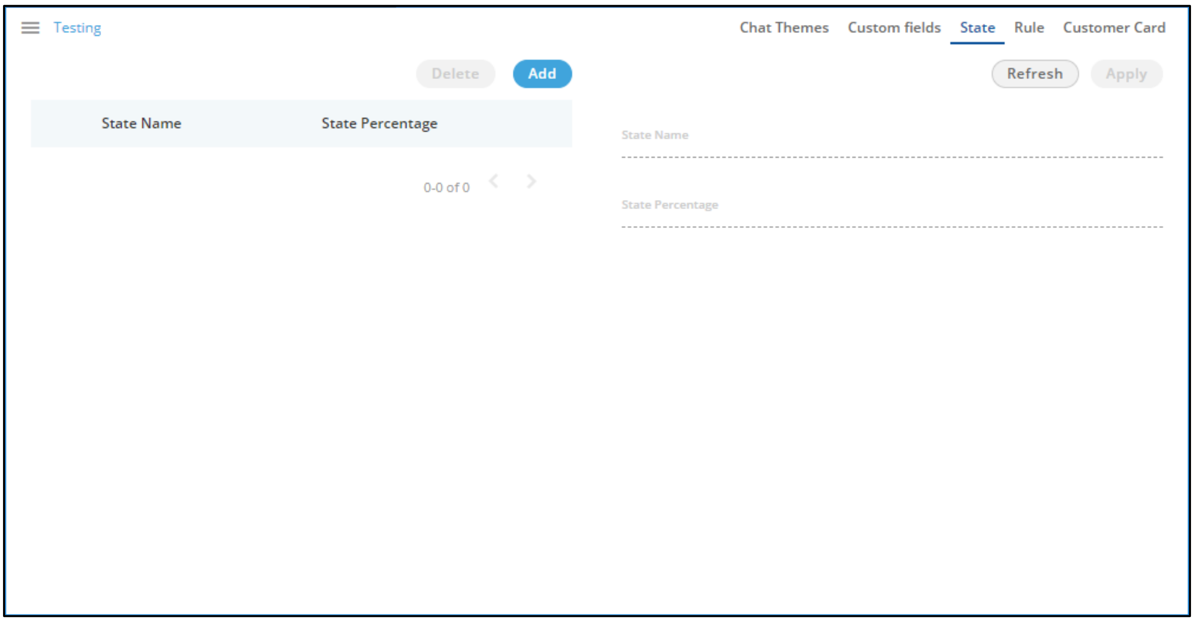


Figure: State Tab

6.3.5.1 Add a State

Perform the following steps to create a state.

1. Click "Add" to add a state using the following pop-up.

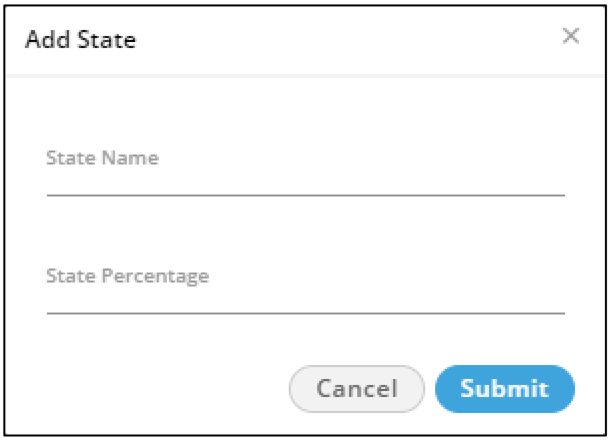


Figure: Add a State

2. Provide a name for the state.
3. Provide a dialing percentage.

Make sure that the total percentage in different state should not exceed 100.

6.3.5.2 Default States

You must have to create the following three default states to enable the PACE even if you assign zero to very less dialing percentage to them.

- **freshNumber:** It is a group of fresh numbers.
- **catNumber:** It is a group of numbers for which CAT (Call Around Time) is set. Call Around Time is the preferred time duration (such as during office hours 10 AM to 7 PM) of a customer to contact for any communication.
- **ns:** It is a group of numbers for which CAT (Call Around Time) is not set.

6.3.5.3 Sampele States

You can create multiple states and divide the 100% dialing percentage between them.

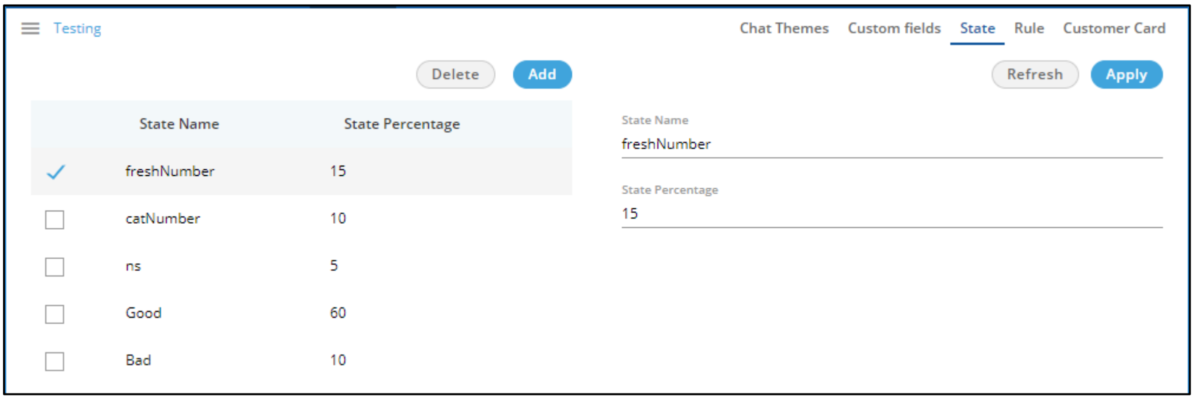


Figure: List of a State

You can edit and delete state.

6.3.6 Rule Tab for PACE in System Settings

Rule Tab in System Settings allows the Administrator to create the rule for the PACE.

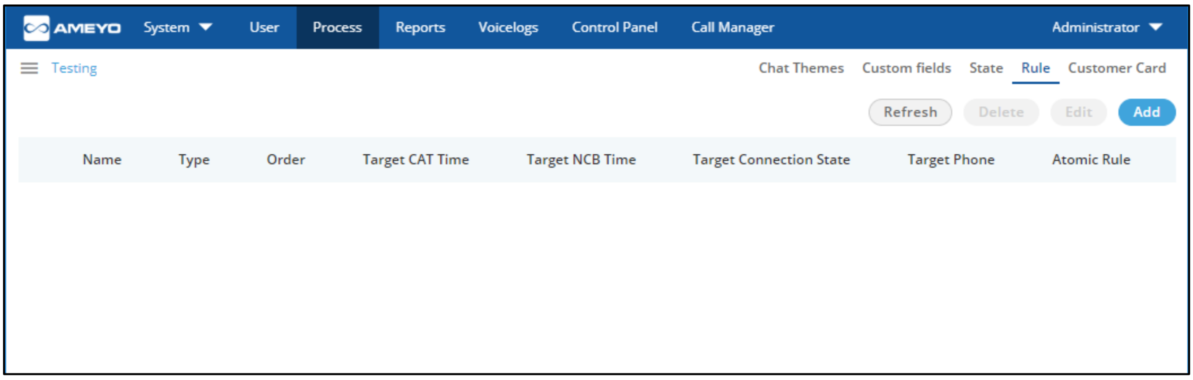


Figure: Rule Tab to Manage PACE

6.3.6.1 Add a PACE Rule

Perform the following steps to add a PACE Rule.

1. Click "Add" to add a PACE Rule using the following pop-up.

Figure: Pop-up to add a Rule

2. Provide a name for the rule.
3. Provide the order of execution in numbers.
4. Provide the target CAT (Call Around Time) in HH:MM:SS format. The call will be made to the customers only during this time.
5. If you want to set the Time before which no call should be made to the customers, then enter this NCB (Not to Call Before) Time in HH:MM:SS format.
6. Except "freshNumber", "catNumber", and "ns", you can select a customized state upon which the rule will be applied.

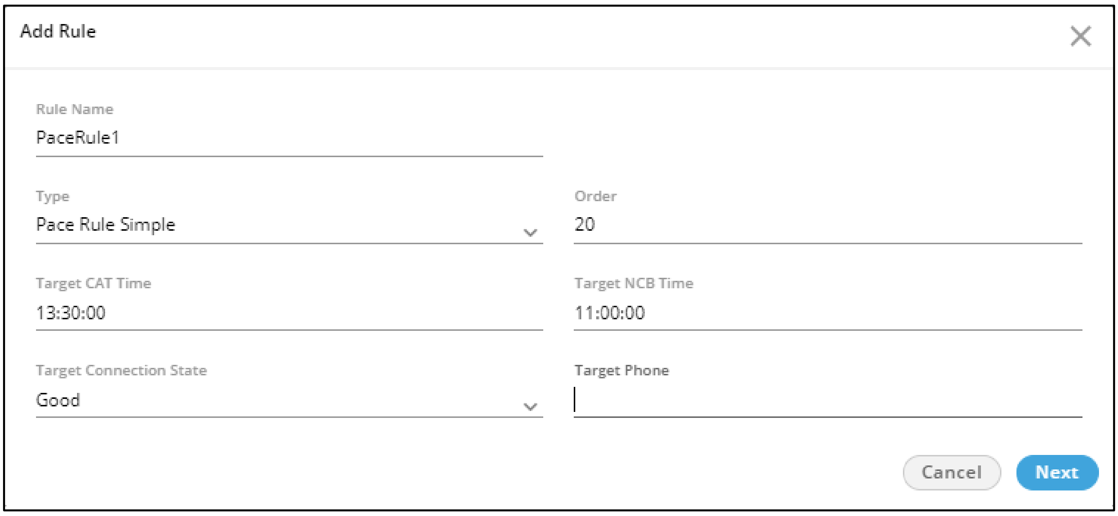


Figure: Sample Details

7. Provide the Target Number.

8. Click "Next" to proceed to the next page, which lets you add the rule conditions.

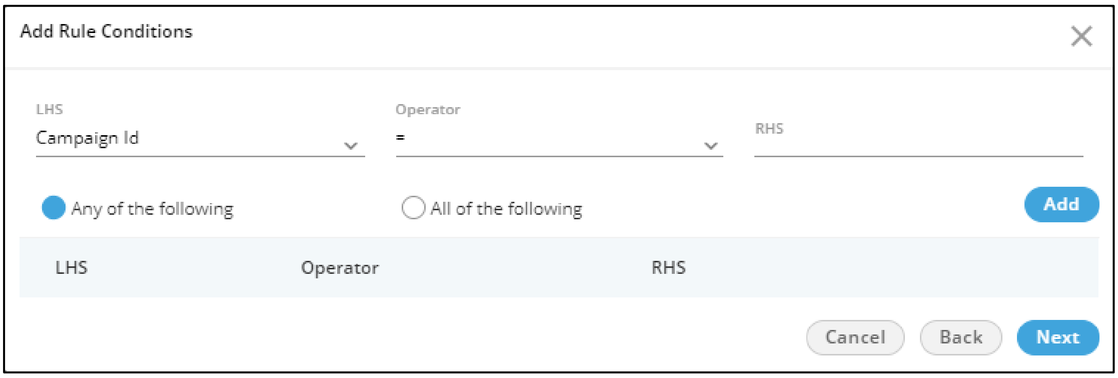


Figure: Add Condition

Here, you have to add a condition for the rule.

9. In "LHS" drop-down menu, select any of the following values.
   - System Disposition
   - Disposition Code
   - Disposition Class
   - Last Status
   - Last Disposition
   - Last Dialed Time
   - CAT Time
   - NCB Time
   - Connection State
   - Campaign ID

10. Select any of the following operators.
   - =
   - <>
   - <=

- >=

11. Provide the corresponding value for any selected "LHS" condition in "RHS" text field.

12. Click "Add" to add the rule.

13. You can add multiple rules here. To manage them, you can select any of the following options.

    - **Any of the following:** Select this option to run the rule when any of the selected conditions is matched.
    - **All of the following:** Select this option to run the rule only when all of the selected conditions are matched.

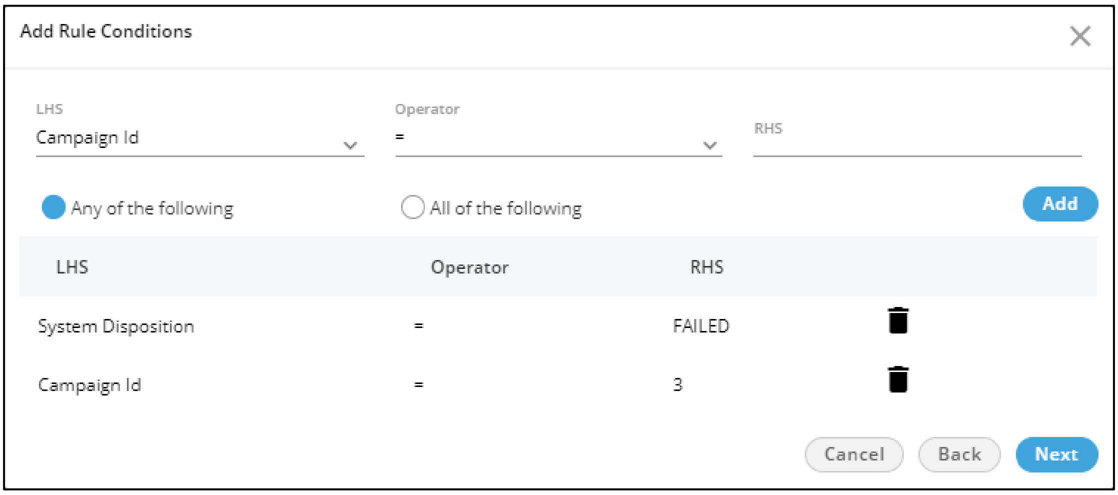


Figure: Add Conditions

You can click icon to delete any rule.

14. Click "Next" to go to the next page, where the action can be selected.

Figure: Select an Action

15. You can select any of the following actions here.

- **None:** Select it to not perform any action on the state (group of numbers), which meets the pre-selected conditions.
- **Move to owner's lead:** Select it to move the the state (group of numbers) to the owner's lead, which meets the pre-selected conditions.
- **Move to lead:** Select it to move the the state (group of numbers) to the lead, which meets the pre-selected conditions. If selected, it shows a drop-down menu that lets you select the lead to which the numbers can be moved.

Figure: Selected to move State (Group of Numbers) to the selected lead

16. Click "Finish" to create the rule.You can create multiple rules by performing these steps.

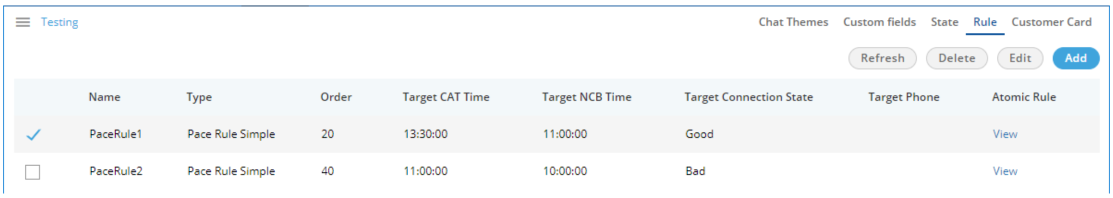


Figure: List of State Rules

You can edit and delete a PACE Rule. You can click "View" for any rule to view its conditions.

6.3.7 Customer Card Tab in Process Settings

"Customer Card" Tab in Process Settings allows the Administrator to configure the layout of Customer Cards.

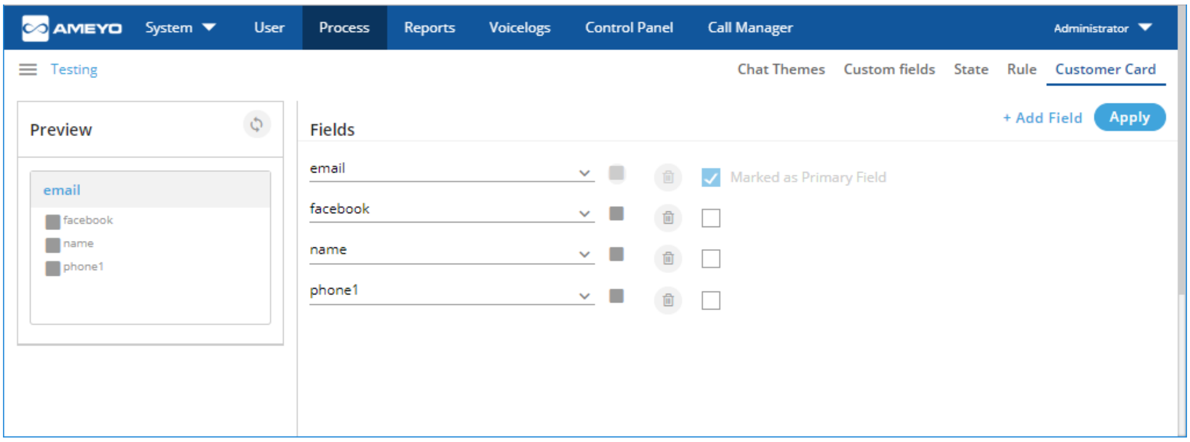


Figure: Customer Card Tab

Customer Cards appear in search bar when a user search for any customer information.

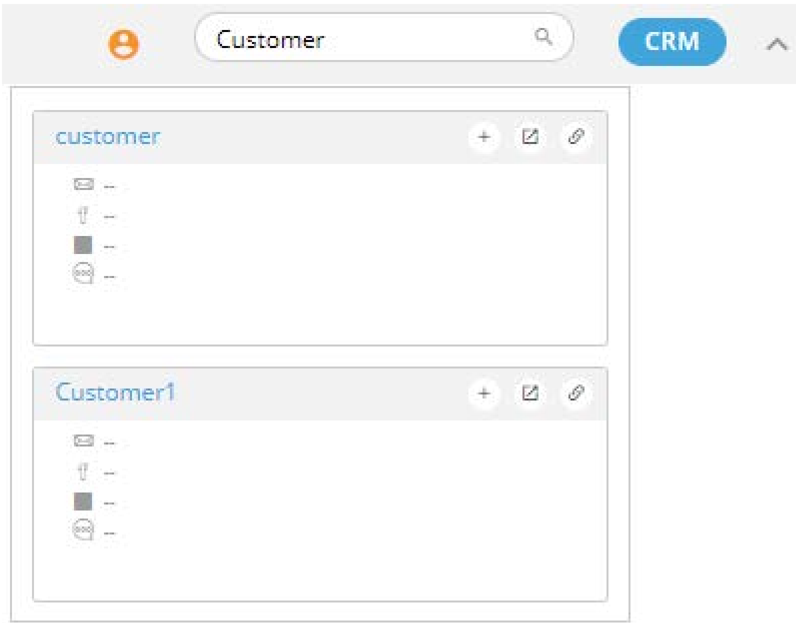


Figure: Displaying Customer Cards in Search

6.3.7.1 Default Fields

By default, there are four fields in the customer card. As per the layout, any four fields must remain. You can delete fields other than any four fields of your choice.

6.3.7.2 Default Values for Fields

The fields in "Customer Card" Tab can have any of the following values. If a field is created for a value that value will not be available when you add or edit another field.

- name
- email
- facebook
- phone1
- phone2
- phone3
- phone4
- phone5
- timezone
- twitter

Here, you can perform the following operations.

6.3.7.3 Add a Field

By default, only four fields are available. Perform the following steps to add a new field.

1. You can click "Add Field" link on the top right corner to add a field. It shows a new blank field in the end of the list.

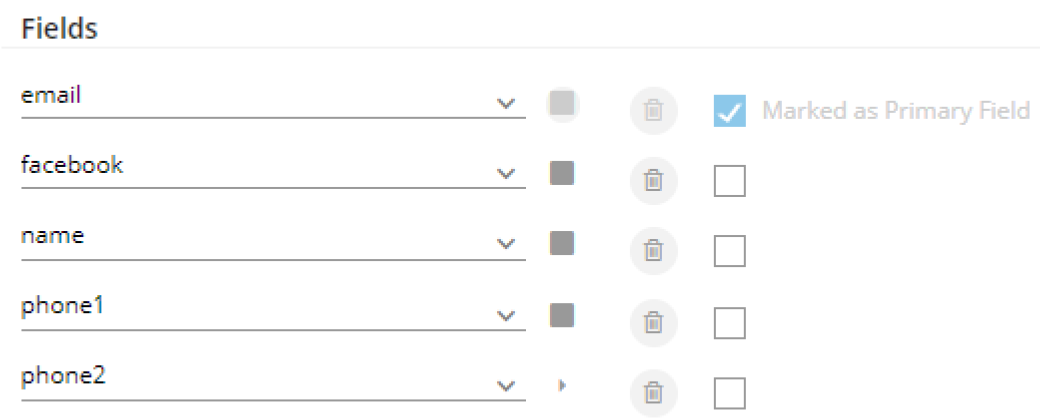


Figure: Add Customer Card

2. Select any field from the drop-down menu.
3. Click the icon to select any icon displayed in the following screenshot.

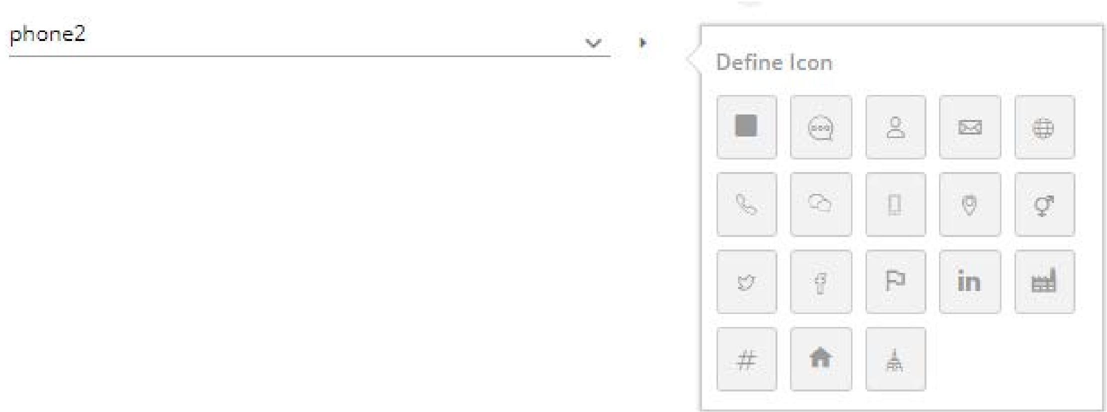


Figure: Select an icon

Select a suitable icon that compliments the field value. For example, you can select "Facebook" icon for facebook field, "Twitter" icon for twitter field, email icon for email, and phone icon for phone.

6.3.7.4 Make Primary Field

There can be only one primary field that will be displayed in the header of the customer card. You just have to select "Make Primary Field" checkbox for any field to make it primary.

6.3.7.5 Edit a Field

You can click edit any field directly by selecting a different value in the drop-down or by selecting a different icon.

You cannot change the icon of the primary field. Make another field primary to edit the icon of an existing primary field.

6.3.7.6 Delete a Field

Click icon to delete any field.

You can click "Apply" to apply the modified fields in the customer card, which is displayed on the left side.

6.3.7.7 Sample Customer Card

Following is a screenshot of the modified fields and customer card.

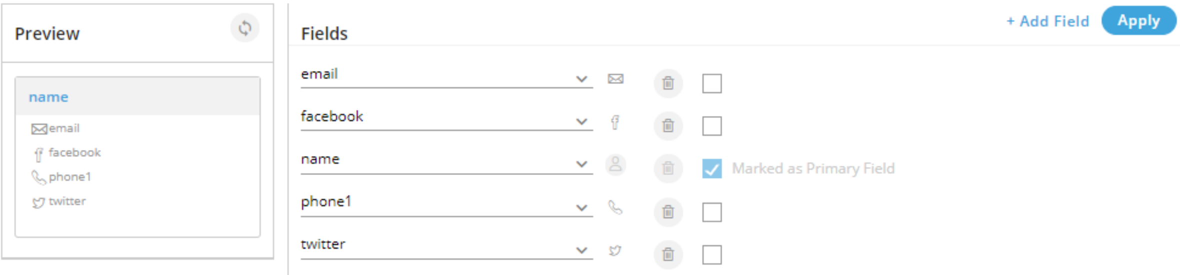


Figure: Modified Customer Card

7. Create a Campaign

Perform the following steps to create a new campaign.

1. Click "Create New Campaign" button in the sidebar.
2. To create a new campaign, click "Create New Campaign" button. A new page is displayed on the screen.

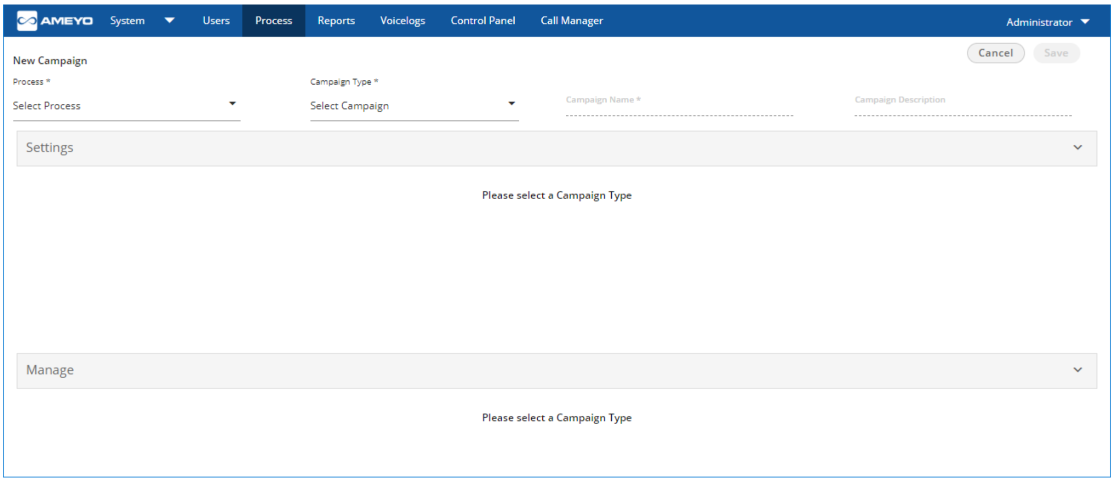


Figure: Create New Campaign

3. Provide the intput for the following fields.
   A. **Process:** Select the process in which the campaign is to be created.
   B. **Campaign Name:** Enter the campaign name.
   C. **Campaign Type:** Administrator can create any of the following types of campaigns.
      I. <u>Chat Campaign</u>: This campaign includes chat-based interactions with the clients. The chat includes the following chat applications.
         - Ameyo Web Chat
         - External Chat Applications
            - Twitter Direct Message
            - Line Messenger

- Viber Messenger
- Facebook Messenger
- WhatsApp
- WhatsApp for Business
- You need a paid account of Smooch (smooch.io) to integrate the external chat applications.

It is mandatory to create both Chat and Interaction Campaign else the users will not be able to login to the Chat Campaign.

II. Interaction Campaign: This campaign includes the interactions based on Email and chat applications included in the selected Chat Campaign.

III. Interactive Voice Application: This campaign includes inbound voice communication. Here, the clients will call at your number and interacts with your users through an IVR or directly.

IV. Outbound Voice Campaign: This campaign includes outbound communication. Here, your users call the clients.

V. Parallel Predictive Voice Campaign: This campaign is an outbound voice campaign, but the dialer will have the features of Parallel Predictive Algorithm to dial the calls.

VI. Voice Blast Campaign: This campaign provides you the facility to broadcast the prerecorded messages to the clients automatically.

D. **Campaign Description:** Enter the description of the campaign.

4. **General Settings:** Now, the steps to configure the General Settings are different for each campaign type. These are given hereinbelow in the following tabbed interface section.

   A. **Chat Campaign:** Provide the inputs for the following fields to configure General Settings for a chat campaign.

I. Preview URL: Provide the preview URL. If you are using Ameyo CRM, then following will be the preview URL.

http://<Server_IP>:8786/testing/preview.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

II. CRM URL: Provide the CRM URL. If you are using Ameyo CRM, then following will be the CRM URL.

http://<Server_IP>:8786/testing/customer.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

III. Disposition URL: Provide the Disposition URL. If you are using Ameyo CRM, then following will be the Disposition URL.

http://<Server_IP>:8786/testing/disposition.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

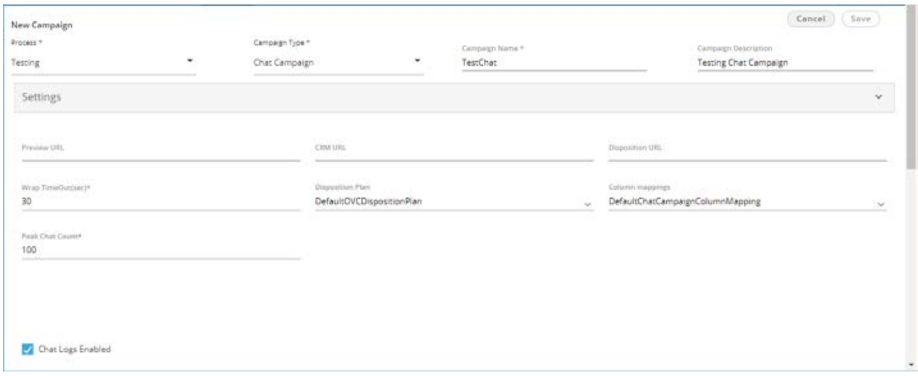


Figure: Creating New Chat Campaign

IV. Wrap Timeout(sec): Provide the duration in seconds are which the idle chat session will be terminated.

V. Disposition Plan: Select any of the following disposition plans.

- DefaultOVCDispositionPlan

- DefaultIVADispositionPlan
- DefaultVBCDispositionPlan
- DefaultCCDispositionPlan
- DefaultIVRCDispositionPlan
- DefaultCSTACDispositionPlan
- DefaultAOVCDispositionPlan

VI. Column Mapping: It shows the default and custom column mappings. You can select any one.

VII. Peak Chat Count: Provide the maximum number of chat sessions that can be handled by an agent at a time even during the peak hours.

VIII. Chat Logs Enabled: Check this box to enable the logging of chat logs. However, you can uncheck it to disable the chat logs.

It is mandatory to create both Chat and Interaction Campaign else the users will not be able to logon in the Chat Campaign.

B. **Interaction Campaign:** Provide the inputs for the following fields.

Ticket will be created only in Interaction Campagin and not in other campaigns. If you want to create tickets for any Voice Campaign, you need to create this campaign also. It is mandatory to create and force users to use both Interaction and Chat Campaigns together.

I. CRM URL: Provide the CRM URL. If you are using Ameyo CRM, then following will be the CRM URL.

http://<Server_IP>:8786/testing/customer.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

II. Column Mapping: It shows the default and custom column mappings. You can select any one.

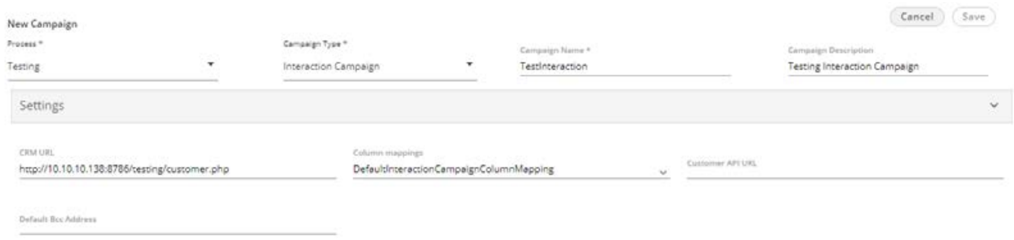


Figure: Creating New Interaction Campaign

III. Customer API URL: If you want to use a third-party API within this campaign, provide the URL of the third-party API.

IV. Default BCC Address: Provide the email address to which all emails be sent by default through BCC.

C. **Interactive Voice Application:** Provide the following inputs to create an interactive voice application campaign.

I. Preview URL: Provide the preview URL. If you are using Ameyo CRM, then following will be the preview URL.

http://<Server_IP>:8786/testing/preview.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

II. CRM URL: Provide the CRM URL. If you are using Ameyo CRM, then following will be the CRM URL.

http://<Server_IP>:8786/testing/customer.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

III. Disposition URL: Provide the Disposition URL. If you are using Ameyo CRM, then following will be the Disposition URL.

http://<Server_IP>:8786/testing/disposition.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

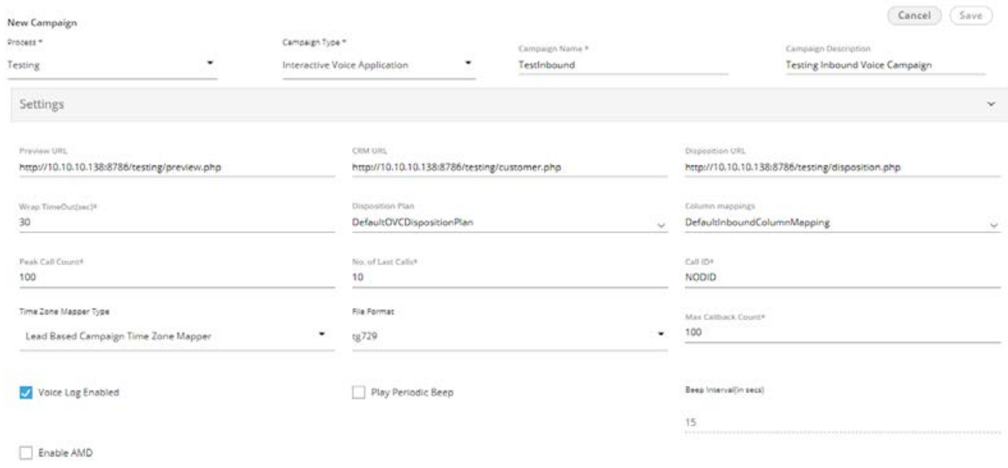


Figure: Creating New Interactive Voice Application Campaign

IV. Wrap Timeout(sec): Provide the duration in seconds are which the idle chat session will be terminated.

V. Disposition Plan: Select any of the following disposition plans.

- DefaultOVCDispositionPlan
- DefaultIVADispositionPlan
- DefaultVBCDispositionPlan
- DefaultCCDispositionPlan
- DefaultIVRCDispositionPlan
- DefaultCSTACDispositionPlan
- DefaultAOVCDispositionPlan

VI. Column Mapping: It shows the default and custom column mappings. You can select any one.

VII. Peak Call Count: Provide the maximum number of chat sessions that can be handled by an agent at a time even during the peak hours.

VIII. No. of Last Calls: Provide the maximum number of last calls.

IX. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.

X. Time Zone Mapper Type: Select any of the following time zone mapper types, which allows you to map the time zones.

- **Lead Based Campaign Time Zone Mapper:** In this case, timezone of the customer is specified from the timezone set in the lead settings.
- **Default Campaign Timezone Mapper:** In this case time zone is determined from customer data. We get the timezone info from the column specified against timezone column mapping in the campaign.
- **Phone Pattern Based Campaign Timezone Mapper:** It is related to number management in Ameyo. With phone pattern based campaign timezone mapper, country code and area code can be mapped to a timezone and all numbers with that country code and area code will be dialled according to that timezone restriction/criteria.
- **State Based Campaign Timezone Mapper:** It is related to number management in Ameyo. With state based campaign timezone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialled according to its timezone restriction/criteria.

XI. File Format: Select any of the following file formats in which the voice recordings will be saved.

- wav
- talaw
- tulaw
- tgsm

- tg729
- alaw

XII. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.

XIII. Voice Logs Enabled: Check this box to enable the logging of voice logs. However, you can uncheck it to disable the voice logs.

XIV. Play Periodic Beep: Check this box to play a beep periodically during the call to notify the caller that the call is being recorded. After checking it, you can specify the interval in seconds after which the beep will be played.

XV. Enable AMD: AMD stands for Answering Machine Detection. Check this box to enable the detection of answering machines when the auto-dialer makes the outbound calls automatically.

D. **Outbound Voice Campaign:** Provide the following inputs to create an outbound voice campaign.

I. Preview URL: Provide the preview URL. If you are using Ameyo CRM, then following will be the preview URL.

http://<Server_IP>:8786/testing/preview.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

II. CRM URL: Provide the CRM URL. If you are using Ameyo CRM, then following will be the CRM URL.

http://<Server_IP>:8786/testing/customer.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

III. Disposition URL: Provide the Disposition URL. If you are using Ameyo CRM, then following will be the Disposition URL.

http://<Server_IP>:8786/testing/disposition.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

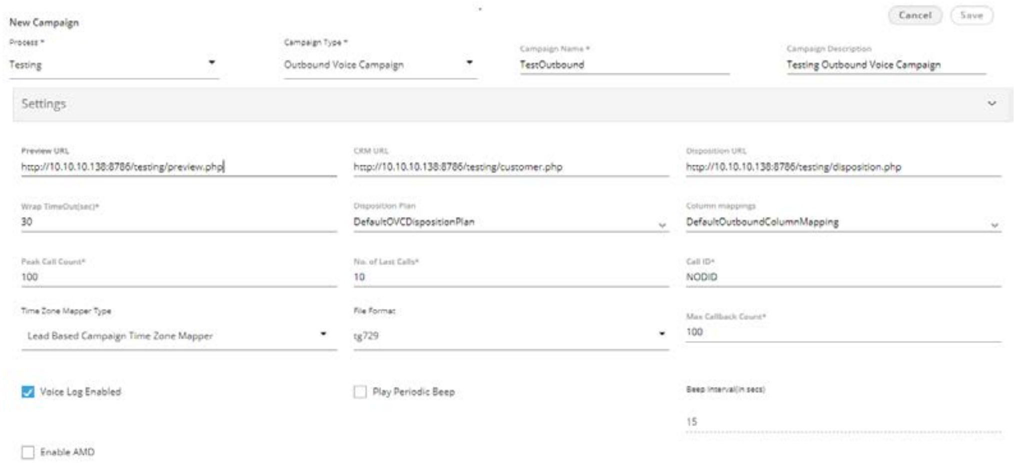


Figure: Creating New Outbound Voice Campaign

IV. <u>Wrap Timeout(sec)</u>: Provide the duration in seconds are which the idle chat session will be terminated.

V. <u>Disposition Plan</u>: Select any of the following disposition plans.

- DefaultOVCDispositionPlan
- DefaultIVADispositionPlan
- DefaultVBCDispositionPlan
- DefaultCCDispositionPlan
- DefaultIVRCDispositionPlan
- DefaultCSTACDispositionPlan
- DefaultAOVCDispositionPlan

VI. <u>Column Mapping</u>: It shows the default and custom column mappings. You can select any one.

VII. <u>Peak Call Count</u>: Provide the maximum number of chat sessions that can be handled by an agent at a time even during the peak hours.

VIII. No. of Last Calls: Provide the maximum number of last calls.

IX. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.

X. Time Zone Mapper Type: Select any of the following time zone mapper types, which allows you to map the time zones.

- **Lead Based Campaign Time Zone Mapper:** In this case, timezone of the customer is specified from the timezone set in the lead settings.
- **Default Campaign Timezone Mapper:** In this case time zone is determined from customer data. We get the timezone info from the column specified against timezone column mapping in the campaign.
- **Phone Pattern Based Campaign Timezone Mapper:** It is related to number management in Ameyo. With phone pattern based campaign timezone mapper, country code and area code can be mapped to a timezone and all numbers with that country code and area code will be dialled according to that timezone restriction/criteria.
- **State Based Campaign Timezone Mapper:** It is related to number management in Ameyo. With state based campaign timezone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialled according to its timezone restriction/criteria.

XI. File Format: Select any of the following file formats in which the voice recordings will be saved.

- wav
- talaw
- tulaw

- tgsm
- tg729
- alaw

XII. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.

XIII. Voice Logs Enabled: Check this box to enable the logging of voice logs. However, you can uncheck it to disable the voice logs.

XIV. Play Periodic Beep: Check this box to play a beep periodically during the call to notify the caller that the call is being recorded. After checking it, you can specify the interval in seconds after which the beep will be played.

XV. Enable AMD: AMD stands for Answering Machine Detection. Check this box to enable the detection of answering machines when the auto-dialer makes the outbound calls automatically.

E. **Parallel Predictive Voice Campaign:** Provide the following inputs to create a voice campaign that will be equipped with the features of Predictive Dialilng Algorithm.

I. Preview URL: Provide the preview URL. If you are using Ameyo CRM, then following will be the preview URL.

http://<Server_IP>:8786/testing/preview.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

II. CRM URL: Provide the CRM URL. If you are using Ameyo CRM, then following will be the CRM URL.

http://<Server_IP>:8786/testing/customer.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

III. Disposition URL: Provide the Disposition URL. If you are using Ameyo CRM, then following will be the Disposition URL.

http://<Server_IP>:8786/testing/disposition.php

Replace <Server_IP> with the IP Address of your computer where CRM is installed.

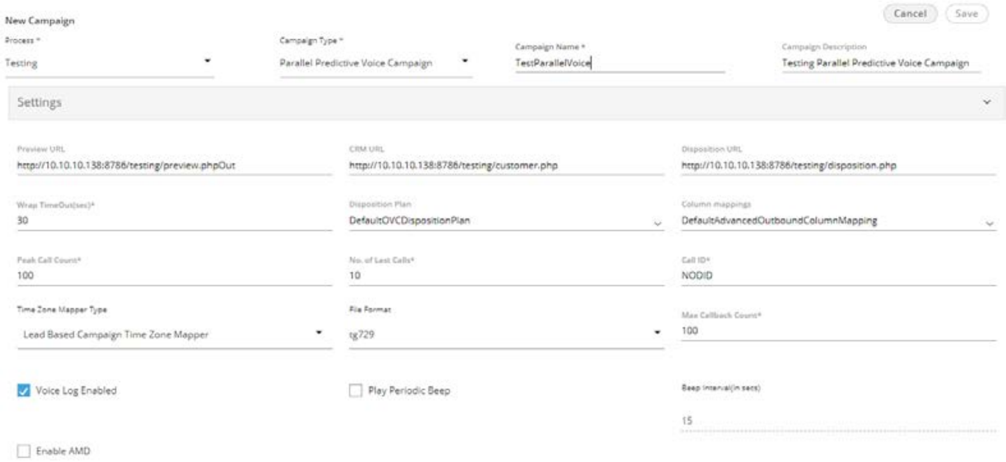


Figure: Creating New Parallel Predictive Voice Campaign

IV. Wrap Timeout(sec): Provide the duration in seconds are which the idle chat session will be terminated.

V. Disposition Plan: Select any of the following disposition plans.

- DefaultOVCDispositionPlan
- DefaultIVADispositionPlan
- DefaultVBCDispositionPlan
- DefaultCCDispositionPlan
- DefaultIVRCDispositionPlan
- DefaultCSTACDispositionPlan
- DefaultAOVCDispositionPlan

VI. Column Mapping: It shows the default and custom column mappings. You can select any one.

VII. Peak Call Count: Provide the maximum number of chat sessions that can be handled by an agent at a time even during the peak hours.

VIII. No. of Last Calls: Provide the maximum number of last calls.

IX. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.

X. Time Zone Mapper Type: Select any of the following time zone mapper types, which allows you to map the time zones.

- **Lead Based Campaign Time Zone Mapper:** In this case, timezone of the customer is specified from the timezone set in the lead settings.
- **Default Campaign Timezone Mapper:** In this case time zone is determined from customer data. We get the timezone info from the column specified against timezone column mapping in the campaign.
- **Phone Pattern Based Campaign Timezone Mapper:** It is related to number management in Ameyo. With phone pattern based campaign timezone mapper, country code and area code can be mapped to a timezone and all numbers with that country code and area code will be dialled according to that timezone restriction/criteria.
- **State Based Campaign Timezone Mapper:** It is related to number management in Ameyo. With state based campaign timezone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialled according to its timezone restriction/criteria.

XI. File Format: Select any of the following file formats in which the voice recordings will be saved.

- wav

- talaw
- tulaw
- tgsm
- tg729
- alaw

XII. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.

XIII. Voice Logs Enabled: Check this box to enable the logging of voice logs. However, you can uncheck it to disable the voice logs.

XIV. Play Periodic Beep: Check this box to play a beep periodically during the call to notify the caller that the call is being recorded. After checking it, you can specify the interval in seconds after which the beep will be played.

XV. Enable AMD: AMD stands for Answering Machine Detection. Check this box to enable the detection of answering machines when the auto-dialer makes the outbound calls automatically.

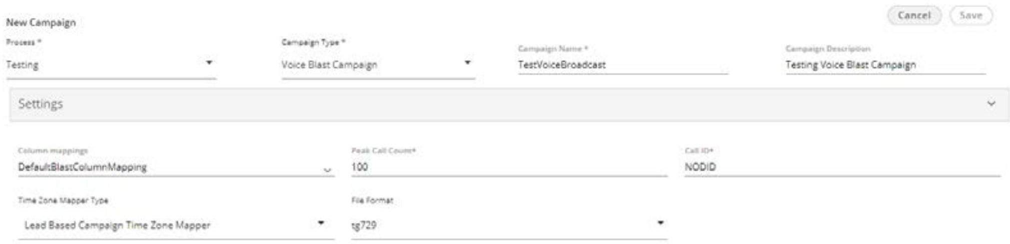


Figure: Creating New Voice Blast Campaign

6. **Manage [Manage Users]:** In this section, you can assign the selected users to the campaign. Only the users having following system (user) roles are displayed here. You can add other users having other roles while modifying the campaign.

   - Supervisor
   - Professional-Agent

- Executive
- Analyst

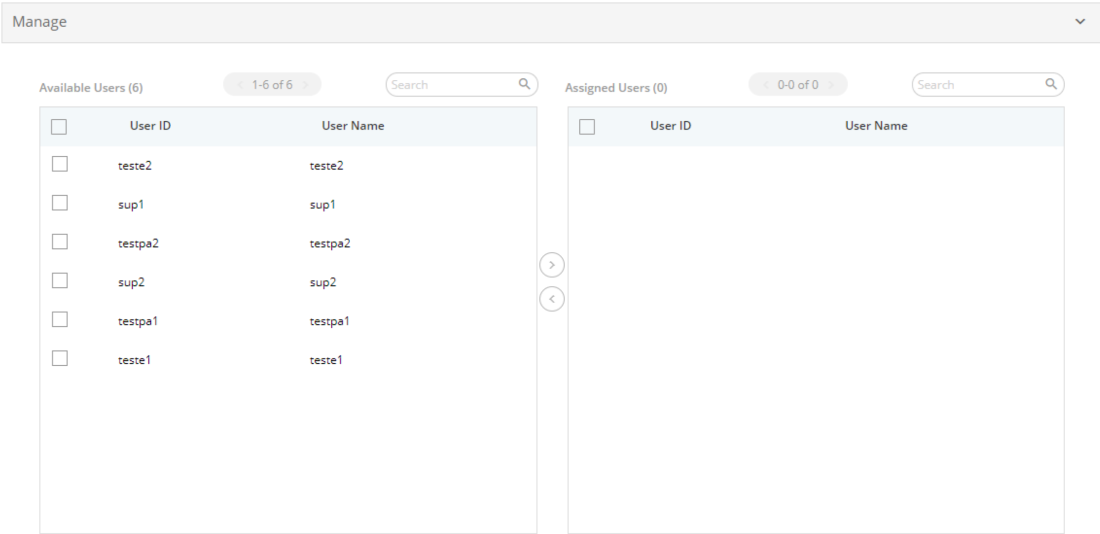


Figure: Section to assign users

Perform the following steps to assign the users to this campaign.

4.

   A. Select the users in "Available Users" section. You can click the checkbox given on top to select all users.

   You can also search for the user names in the provided search box.

   B. Click icon to add the selected users.

To unassign the users, select the users in "Assigned "Users" section and icon.

5. Browse to top, and click "Save" button to create the campaign.

   Alternatively, you can click "Cancel" to not create the campaign. Once the campaign is created, it is visible under its process in the sidebar. You can click the Process to view the campaigns created in it.

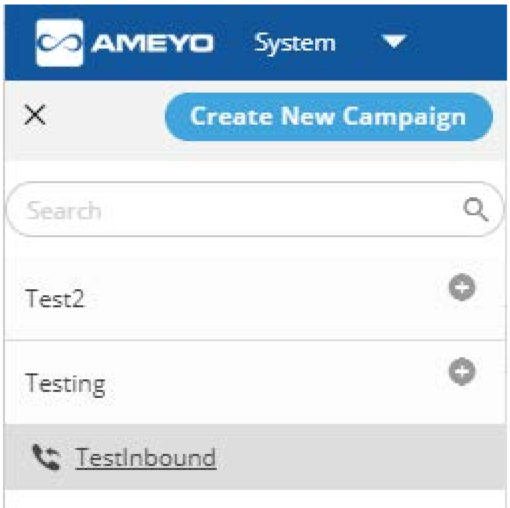


Figure: Created the Campaign

Similarly, the following campaigns are created in "Testing" Process.

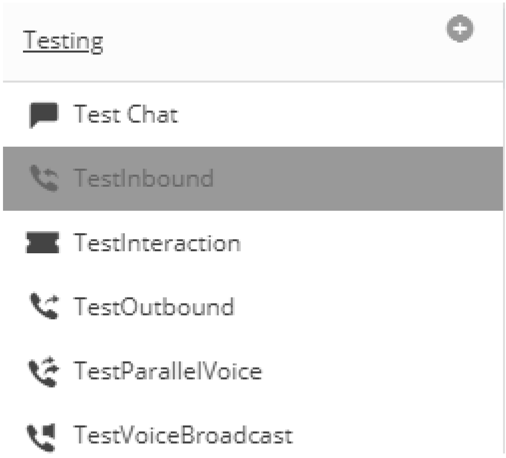


Figure: Created Multiple Campaigns

After creating any or multiple campaigns of any type, multiple tabs are created in "System" → "System Configuration" Tab. These tabs can be configured to have unique settings on all campaigns.

8. Changed System Configuration after Creating Campaign

8.1 Changed System Configuration After Creating Campaign

New tabs are created in "System" → "System Configuration" after creating a campaign. You can configure these tabs to apply the settings on all campaigns in a process.

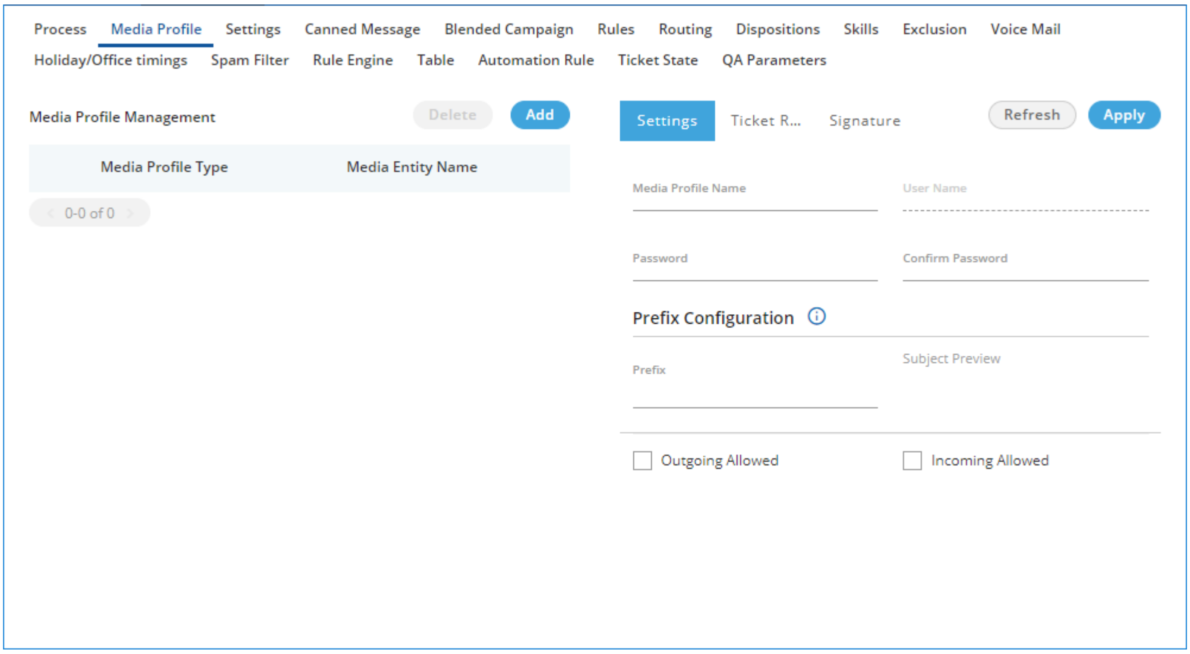


Figure: New Tabs after creating the campaign

Click the links to know more about them.

- Media Profile
- Canned Message
- Blended Campaign (Licensed Feature)
- Rules
- Routing
- Dispositions
- Skills (Licensed Feature)

- Exclusion
- Voice Mail (Licensed Feature)
- Holiday/Office Timings (Licensed Feature)
- Spam Filter
- Rule Engine
- Automation Rule
- Ticket State

8.2 Media Profile

8.2.1 Media Profile

This tab allows you to create the Media Profiles such as Email Address, Twitter, and Facebook. After creating the media profile, you can modify its settings, select ticket resolver, and add signature.

8.2.1.1 Types of Media Profiles

Following are the types of Media Profiles. You can create and delete media profiles. You can also modify their settings, view or modify their ticket resolvers, and manage signatures for Email Media Profile. Click the links to know more about them.

- Email
- Facebook Media Profile
- Twitter Media Profile

8.2.2 Email Media Profile

As the name suggests, its lets the Admnistrators add an email address as a media profile. After assigning to campaign, this email media profile can be used to send and receive emails to interact with the clients.

8.2.2.1 Create Email Media Profile

Perform the following steps to create an Email media profile.

1. Click "Add" to create an email media profile. It shows the following pop-up.

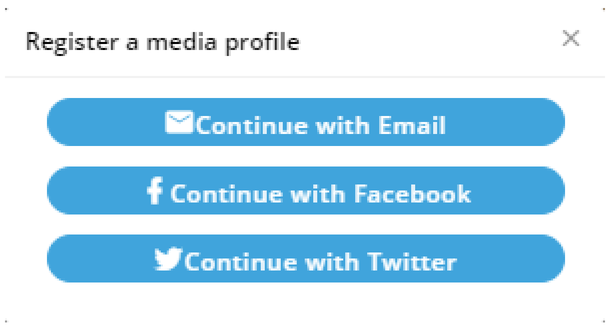


Figure: Register a Media Profile

2. Click "Continue with Email" to create an Email based Media Profile using the following pop-up.

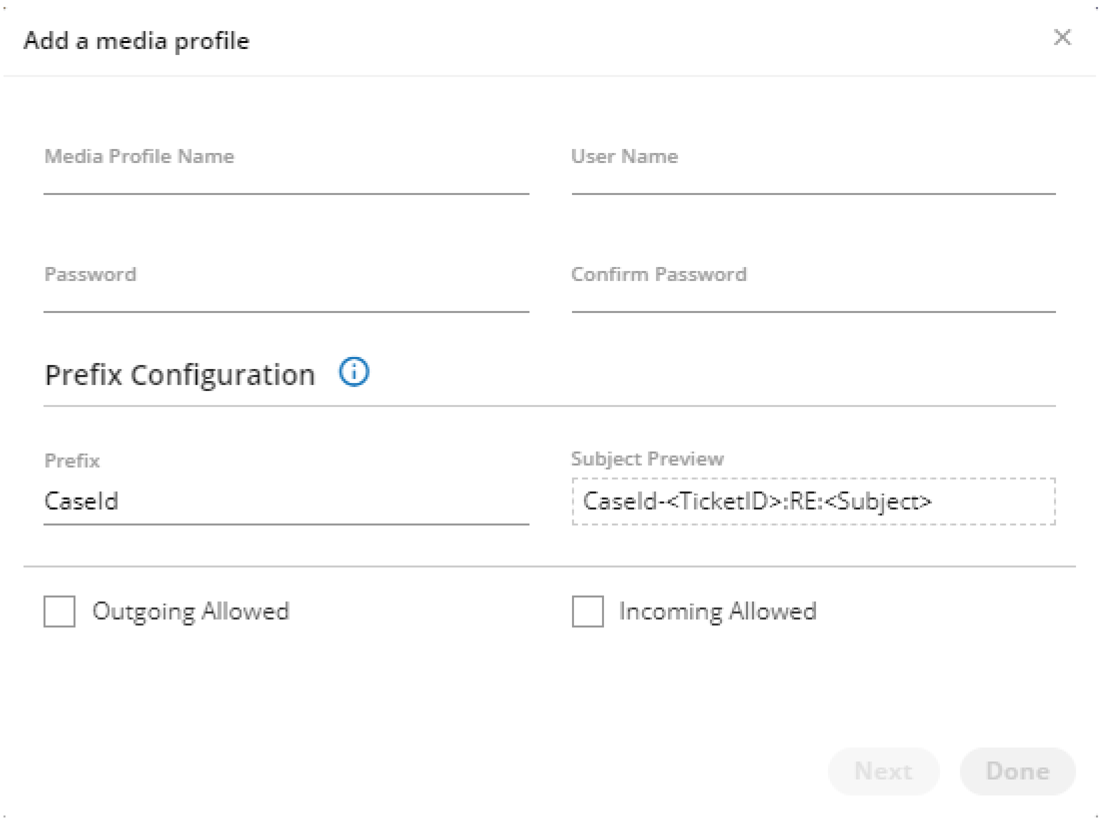


Figure: Create Email Media Profile

3. **Media Profile Name:** Provide a name for the new media profile.
4. **User Name:** Provide a username for the new media profile.
5. **Password:** Provide a password for the user of new media profile.
6. **Confirm Password:** Re-enter the same password to confirm.
7. **Prefix:** Provide a prefix for the subjects.
8. **Subject Preview:** Provide the subject that will be sent with the emails sent using this profile.
9. **Outgoing Allowed:** Check this box to allow the sending of outgoing emails. After enabling it, you have to provide the following inputs.
   A. Outgoing Host: Provide the SMTP Address of your email provider.
   B. Outgoing Port: Provide the port number for sending outgoing emails.
   C. Send Protocol: Select any of the following protocols to send the emails.
      - NONE
      - SMTP
      - SMTPS
      - EWS (Exchange Web Services)
   D. Outgoing Folder: Provide the folder name that will store the outgoing email.
   E. Enable 'reply-to' email: Check this box to provide "reply-to" email address. If a recipient click on reply on the received email, the the email address provided here will be the recipient. After enabling it, provide the reply-to email.
   F. Delete mail on Fetch: Select it to delete those emails which have been fetched.

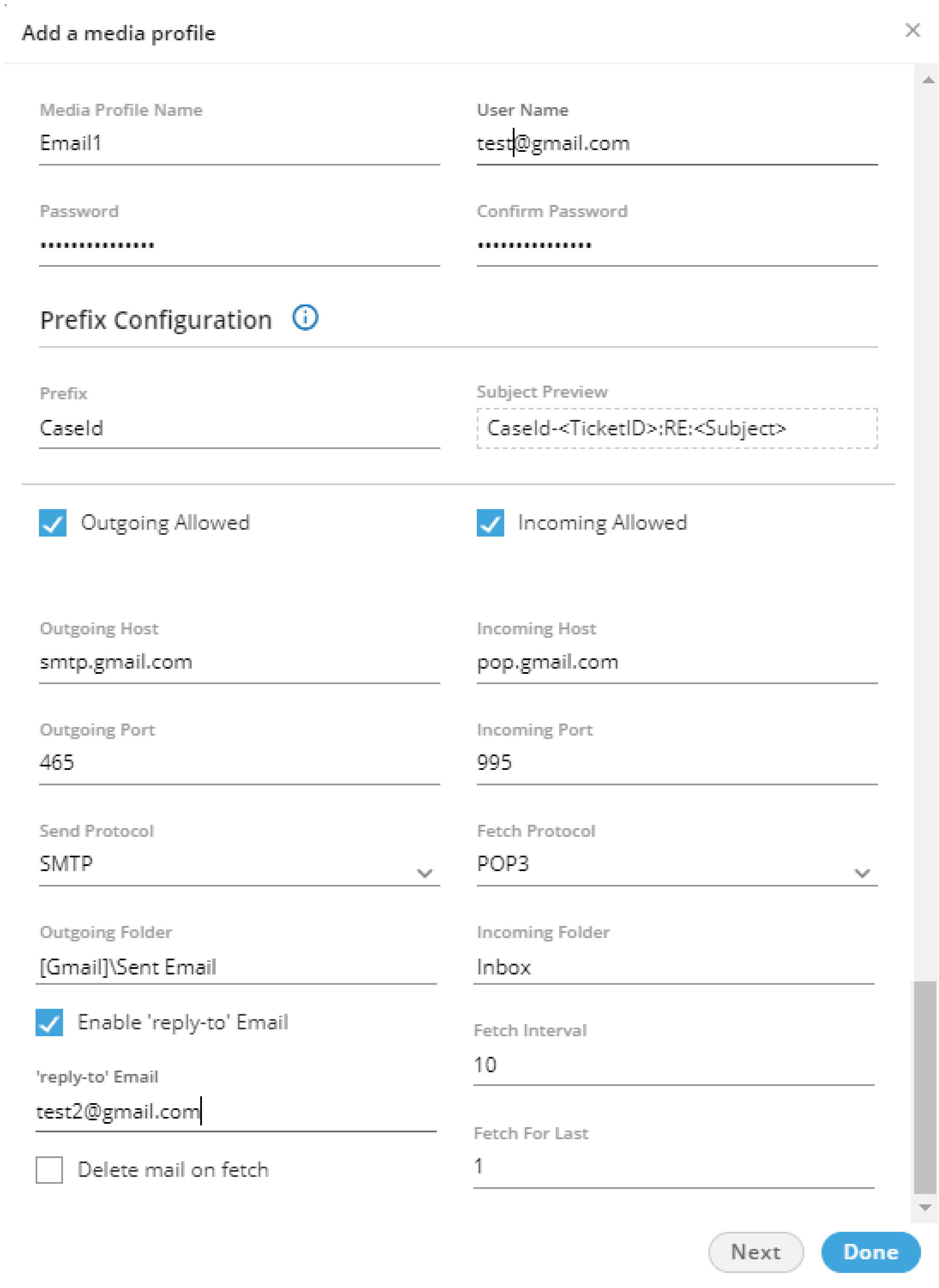


Figure: Sample Email Media Profile

10. **Incoming Allowed:** Check this box to allow the receiving of incoming emails. After enabling it, you have to provide the following inputs.

A. Incoming Host: Provide the incoming Address of your email provider.

B. Incoming Port: Provide the port number for receiving the incoming emails.

C. Fetch Protocol: Select any of the following protocols to receive the emails.

- NONE
- IMAP
- IMPAS
- POP3
- POP3S
- EWS (Exchange Web Services)

D. Incoming Folder: Provide the folder name that will store the outgoing email.

E. Fetch Interval: Provide the interval after which the system will check for the incoming emails.

F. Fetch for Last: Provide the number of the last days of which emails has to be downloaded.

11. Click "Save" to create the Email Media Profile.

8.2.2.2 View and Modify Settings of Email Media Profile

Select an email media profile in the list to view its settings on the right side under "Settings" tab.

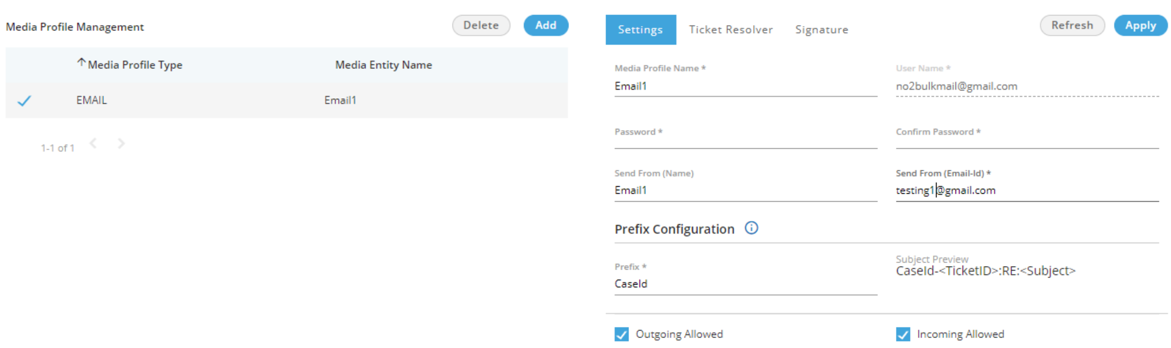


Figure: Settings of Email Media Profile

You can modify the settings here and click "Apply" to apply the same. Rather, you can click "Refresh" to discard the changes.

8.2.2.3 Delete Email Media Profile

The deleted Email Media Profile cannot be retrieved back. The campaigns, queues, and users using this Media Profile will be disabled to use the Email Media Profile to interact with your clients.

Perform the following steps to delete a Facebook media profile.

1. Select an Email media profile.
2. Click "Delete" to delete it. It shows the following warning message.

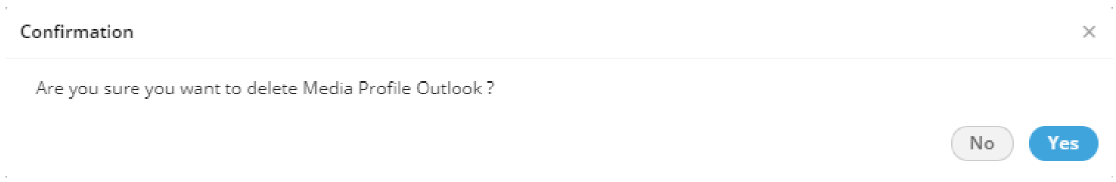


Figure: Asking to delete the Email Media Profile

3. Click "Yes" to delete the email media profile. Rather, you can click "No" to not delete it.

8.2.2.3.1 Ticket Resolver for Email Media Profile

This tab lets you manage how the tickets in a campaign (where the selected media profile is added) will be handled. Following is a screenshot for Ticket Resolver Tab for a Email Media Profile.

Figure: Ticket Resolver of Email Media Profile

You can click the drop-down menu titled "Select Ticket Resolver" to select any of the following options.

- **Single ticket for each customer:** Select it to create asingle ticket for all emails from a customer in the campagin. Every new email from the same customer with same or different subject will be appended in the same ticket.
- **Single ticket of same subject:** Select it to create a single ticket for all emails having same subject. All emails having same subject from same or different customers will be
- **Single ticket of same subject from same customer:** Select it to crate a single ticket for all emails having same subject sent from the same customer.
- **Single ticket with same subject from observer:** Select it to create a single ticket of all emails having same subject from the observer who is in CC of an email received from a customer.
- **Subject Media Profile Customer Interaction Resolver:** Select it to create a single ticket for all emails having same subject from the same customer for the same media profile. New ticket will be created only when the customer sends an email with other subject to same media profile or connect with other media profiles with same or other subject.

When you select a resolver, it gets added in the list. The added ticket resolvers will be removed from the drop-down menu. After adding mutliple resolvers, you can move them to up or down to specify their priority. See the following screenshot.

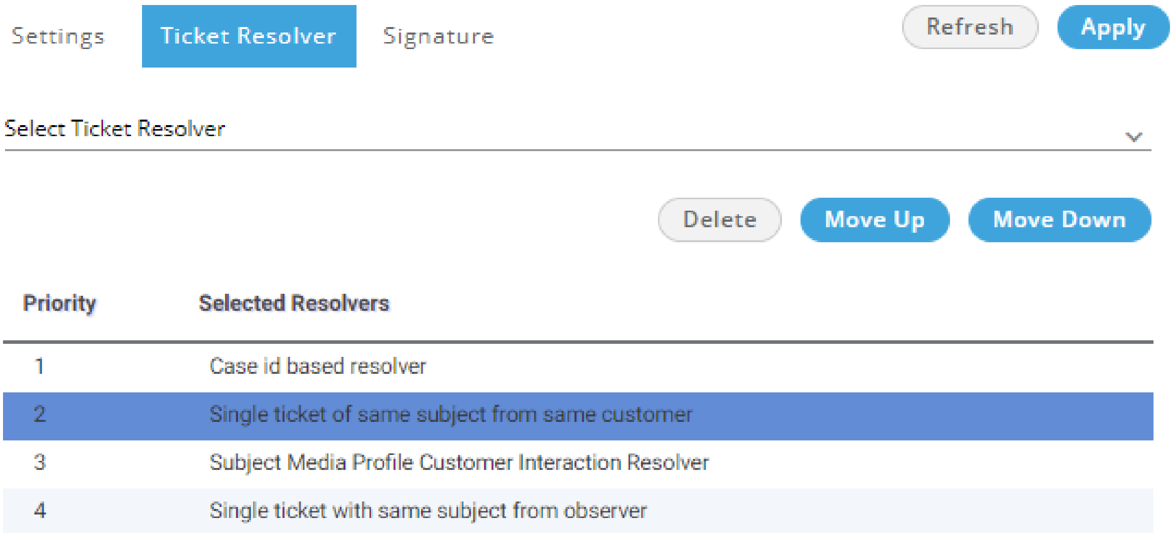


Figure: Added Ticket Resolvers

8.2.2.4 Signature

This tab will be visible only for Email Media Profile. This tab lets Administrator to specify the signature for all emails that will be sent using this email media profile.

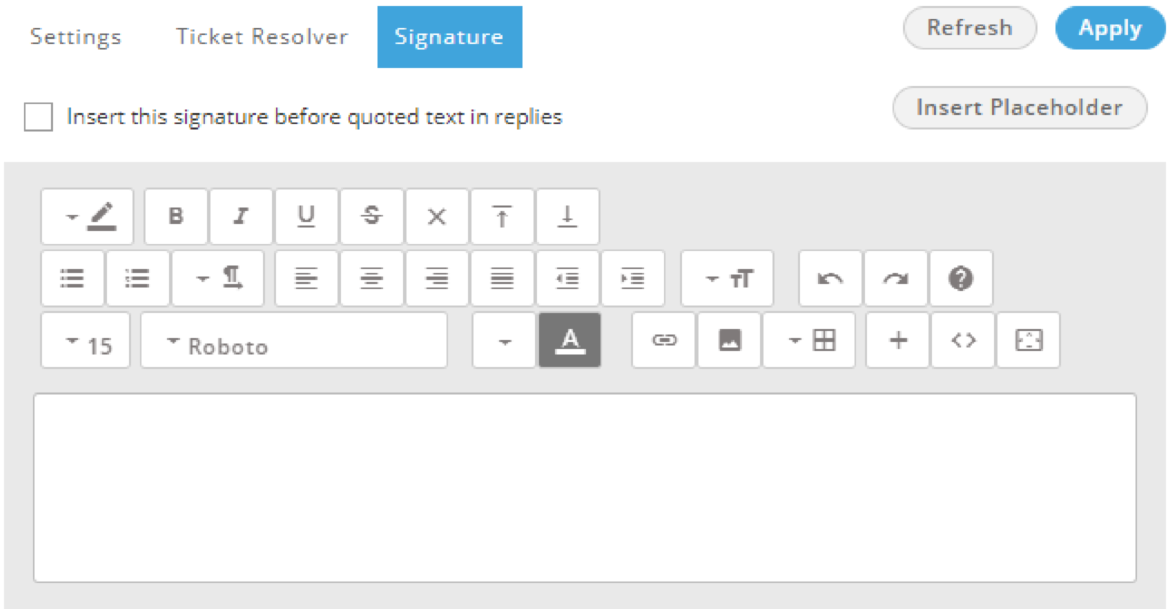


Figure: Blank Email Signuatre

Here, perform the following steps to create an email signature.

1. Click "Insert this signature before quoted text in replies" to insert the signature before the quoted text. Keep it uncheck if you want to insert the signatures after the quoted text.
2. You can type the signature in the textarea and use the available tools to format the text, add a hyperlink, and insert an image.
3. Click "Insert Placeholder" to insert the dynamic placeholders from the following dialog box.

Figure: Signature Placeholder

4. After creating the signature, click "Apply" to apply the same. Now, the created signature will be displayed on all emails being sent through the selected Email Media Profile.

8.2.3 Facebook Media Profile

8.2.3.1 Facebook Media Profile

This media profile lets you interact with your clients using the Facebook. You can interact with posts, comments, and messages using it. It is requried to perform the following steps sequentially for creating a Facebook Messenger Media Profile.

1. **Create Facebook Account and Page**
2. **Create Facebook App and Make it Public**
3. **Generate App Access Token for your Facebook Page**
4. **Integrate the App with Ameyo**
5. **Submit Your App to Facebook for Review**

8.2.3.1.1 Prerequisites

1. Facebook Login Credentials
2. Facebook Page
3. Facebook App registered with Facebook

If above prerequisites are not met, perform the following steps.

8.2.3.1.2 Create Facebook Account and a Facebook Page

1. Create a Facebook account for the organization.
2. Go to **Facebook.com**, fill the required details, and click "Sign Up".

   You need to confirm your email or mobile phone number. Refer to "How to create Account on Facebook" page for more information.

3. Visit Create a Facebook Page, select a Page Type, and follow onscreen instructions to create a page.

   Refer to "How to create a Facebook Page" for more information.

8.2.3.1.3 Create Facebook App

Perform the following steps to create a Facebook App.

1. Visit "Facebook Developers Portal" and login with your credentials.
2. Go to "My Apps" and click "Add New App". It shows the following pop-up.

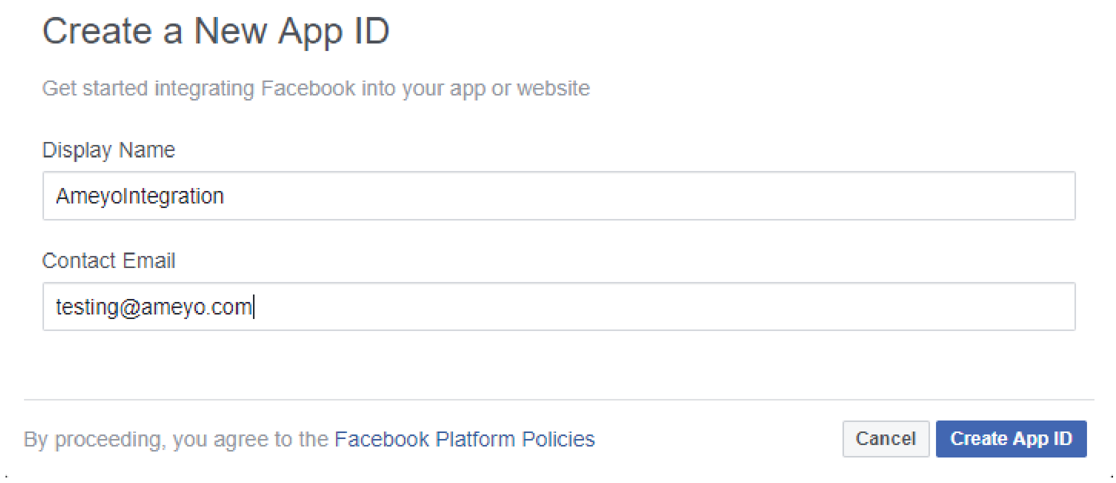


Figure: Creating a New Facebook App

3. Provide the display name for App and your contact email address.
4. Click "Create App ID".
5. Verify "CAPTCHA", if it appears. The following page is displayed.

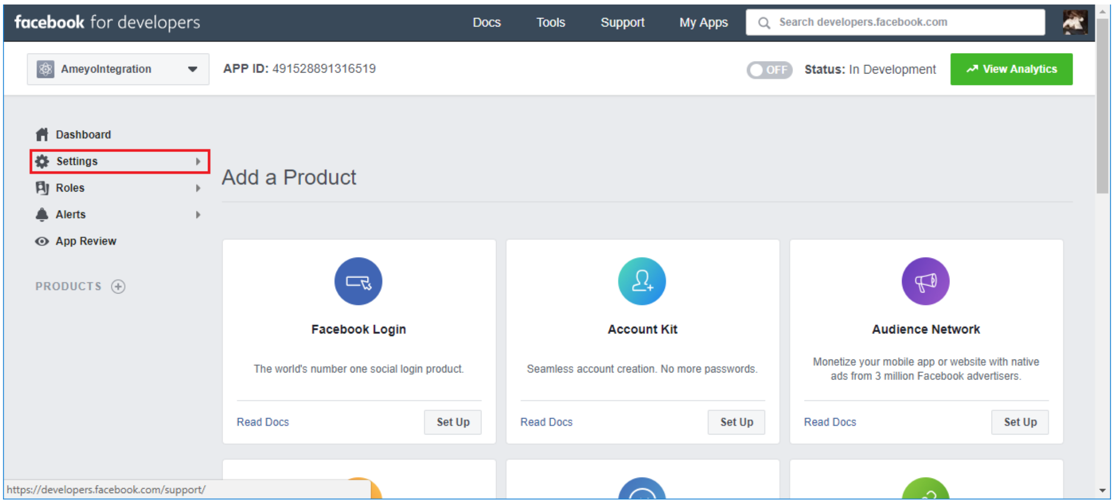


Figure: Asking to select product to create Facebook Page

6. Do not click on any product here. Rather, Click "Settings" in the left panel to expand its items, and then click "Basic". It shows the following page.

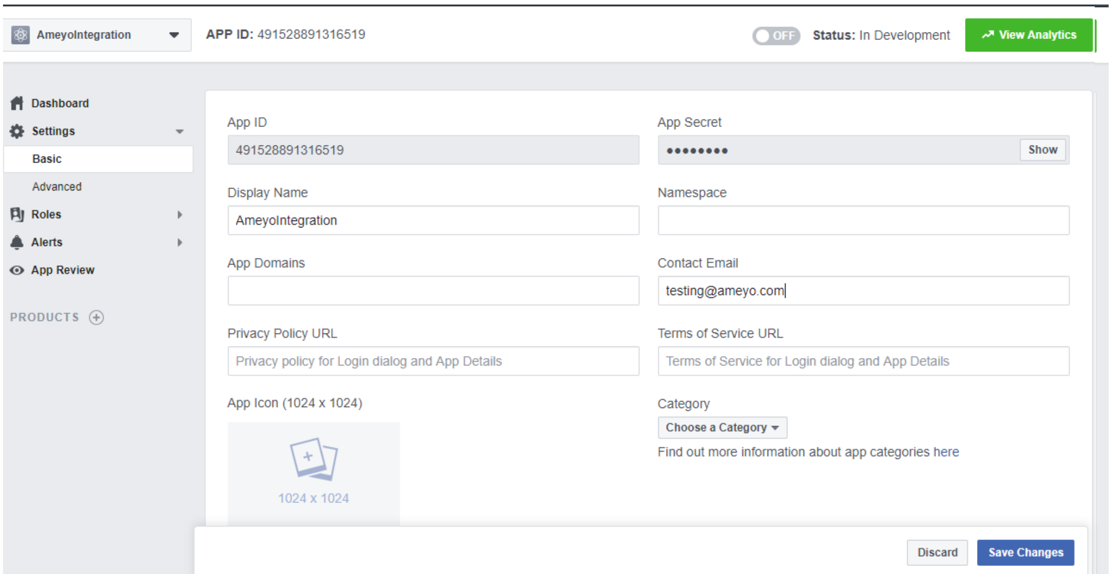


Figure: Basic Settings

7. Enter the value of following fields.

   A. **Privacy Policy URL:** Enter the URL of the privacy policy of your organization. It may be "Privacy Policy" page hosted at your Website.

   B. Select the category as "Business and Pages".

   C. Select "Support my own business" in "Business Use" section.

   D. Upload an app icon of the required size.

Following is a screenshot with sample details.

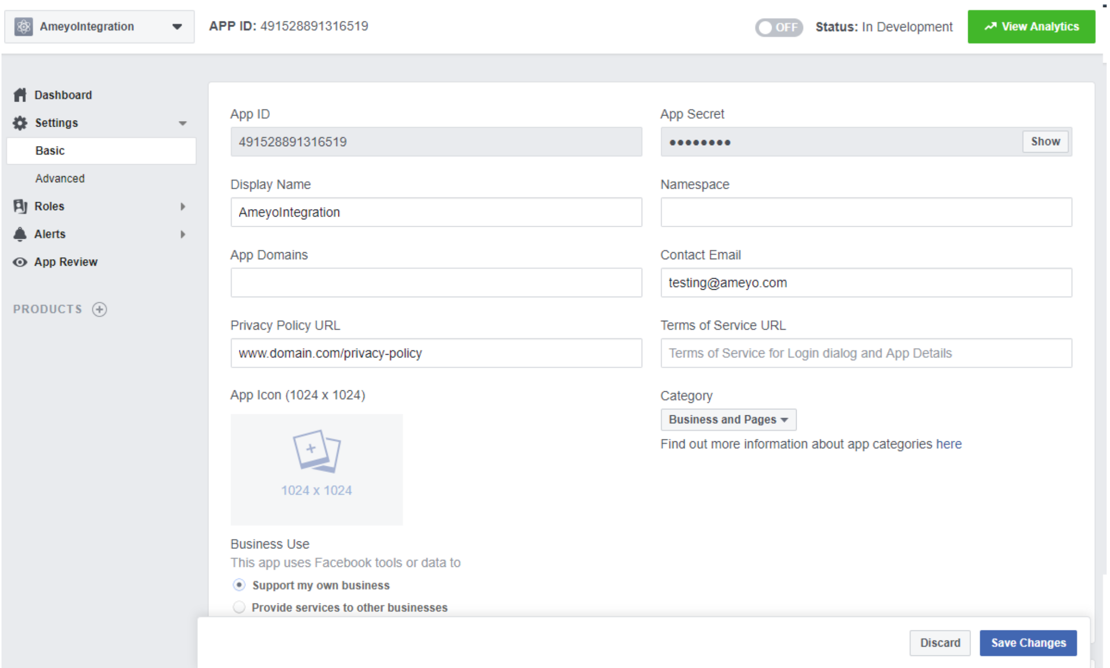


Figure: Sample Basic Settings

8. Scroll down and click "+Add Platform". It shows the following pop-up.

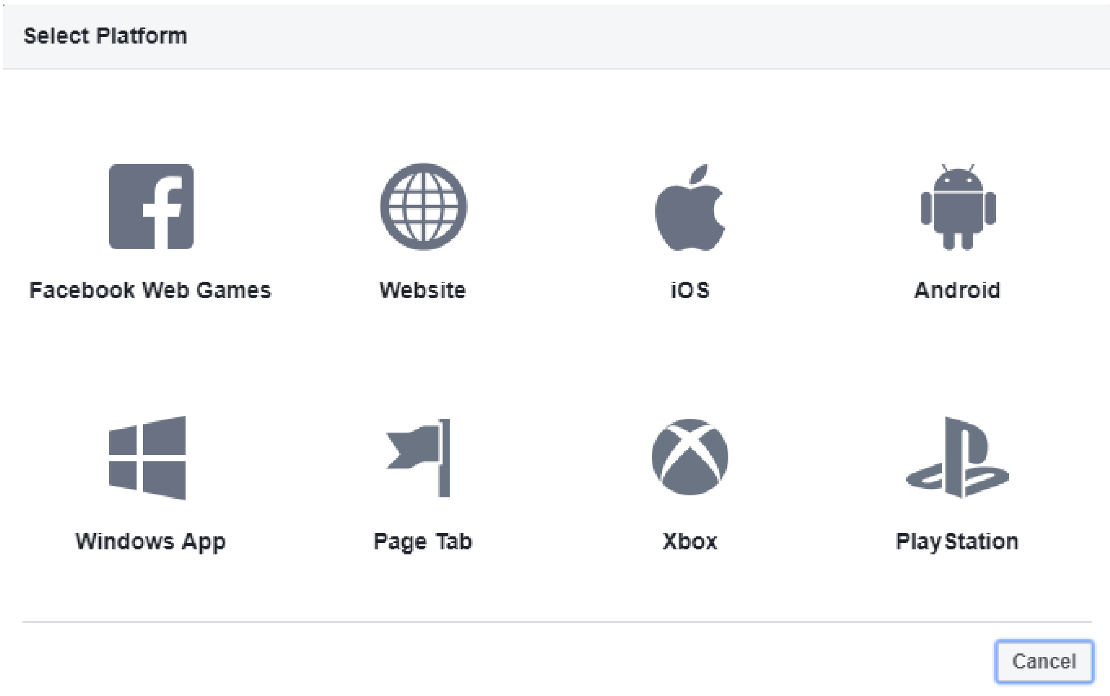


Figure: Platforms for Facebok App

9. Select "Website". It shows the following box.

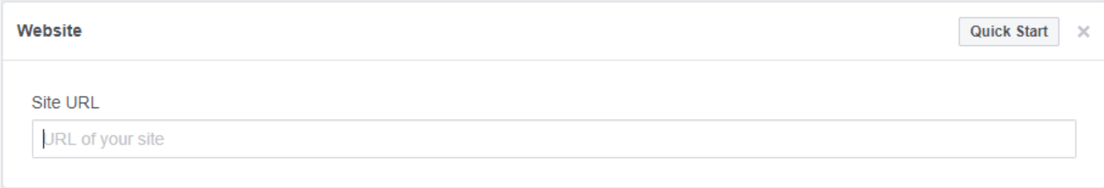


Figure: Textbox to provide Website URL

10. Enter the URL of your Website where Ameyo Server is running. Preferrably, it should be in HTTPS format.
11. Click "Save Changes".
12. Now, click "App Review" in the left panel. It shows the following page.

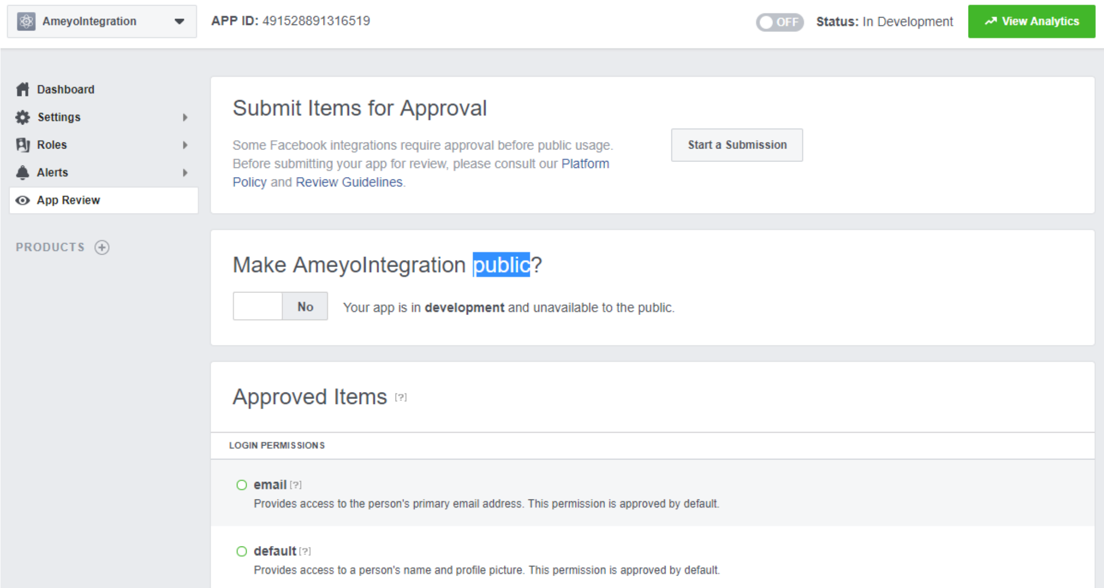


Figure: Make your App Public

13. Click the toggle switch in "Make <App_Name> public?" section to make your App public.

Do not submit your App for approval here.

8.2.3.1.4 Facebook App Token Generation

Perform the following steps to generate the access token for your app.

1. Visit "Facebook Graph API Explorer" and login with your credentials.

2. Select the App for which you want to generate the token.

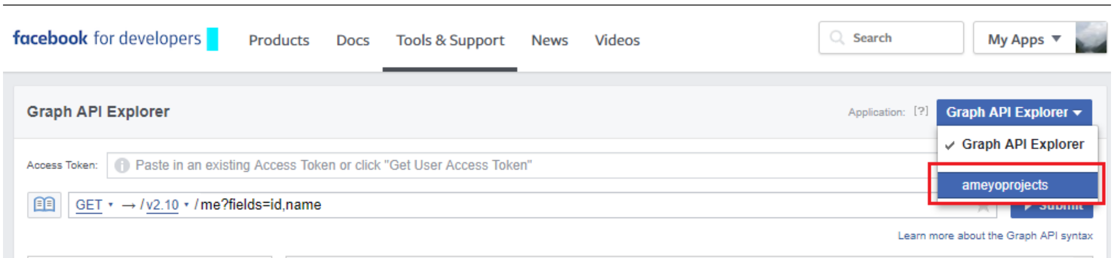


Figure: Select App

3. Select "User Access Token" in the drop-down menu.

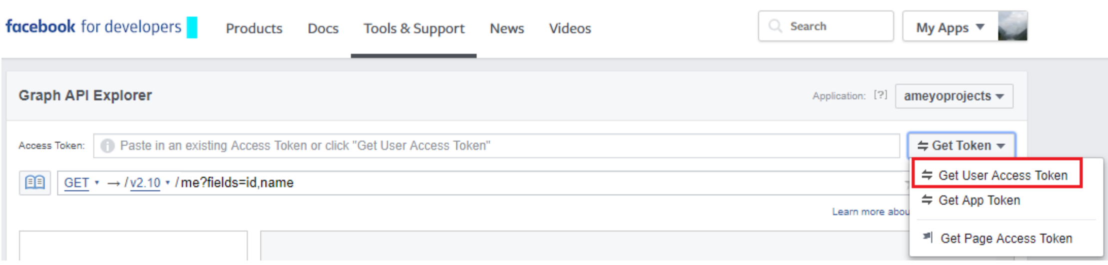


Figure: Select Token

4. After selecting the token, you have to select the permissions.

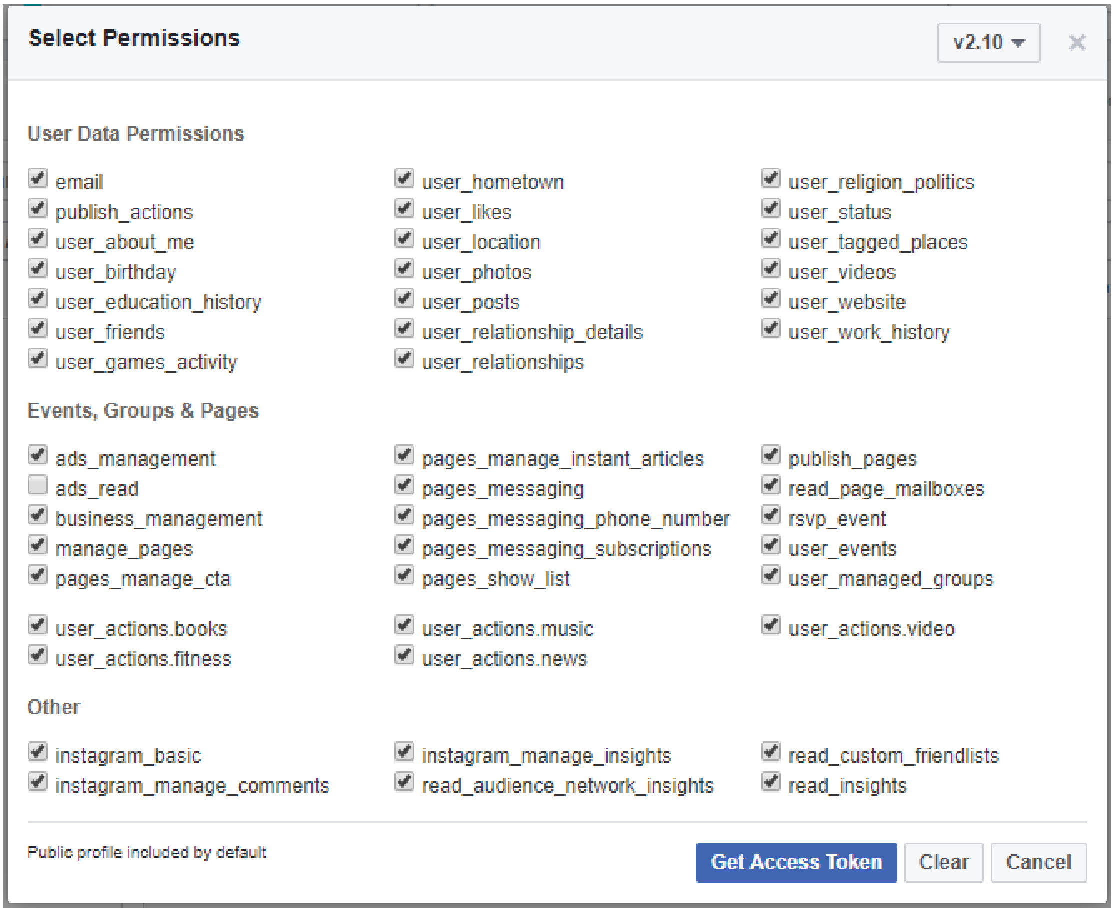


Figure: Select Permissons

5. Clck "Get Access Token" to get the access token. You will get a token here, which you have to copy and reuse to generate a final token.
6. Now, you have to enter these details in the following URL format.

   https://graph.facebook.com/oauth/access_token?client_id=<APP_ID>&
   client_secret=<APP_SECRET>&
   grant_type=fb_exchange_token&fb_exchange_token=<ACCESS_TOKEN>

   Here, you have to replace <APP_ID>, <APP_SECRET>, and <ACCESS_TOKEN> with your own values.
7. Open this URL in a Web browser. The browser will dipslay the access token.

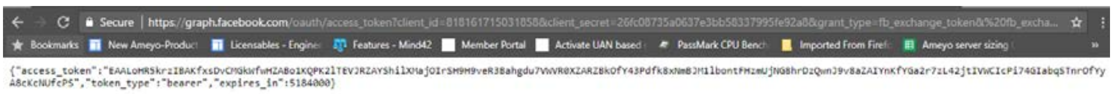


Figure: Access Token

8. Copy this access token and paste it into the Graph API Explorer. Now, type the following two words in the explorer.

   me/accounts

9. Click "Submit" button. A set of code appears in the textarea.

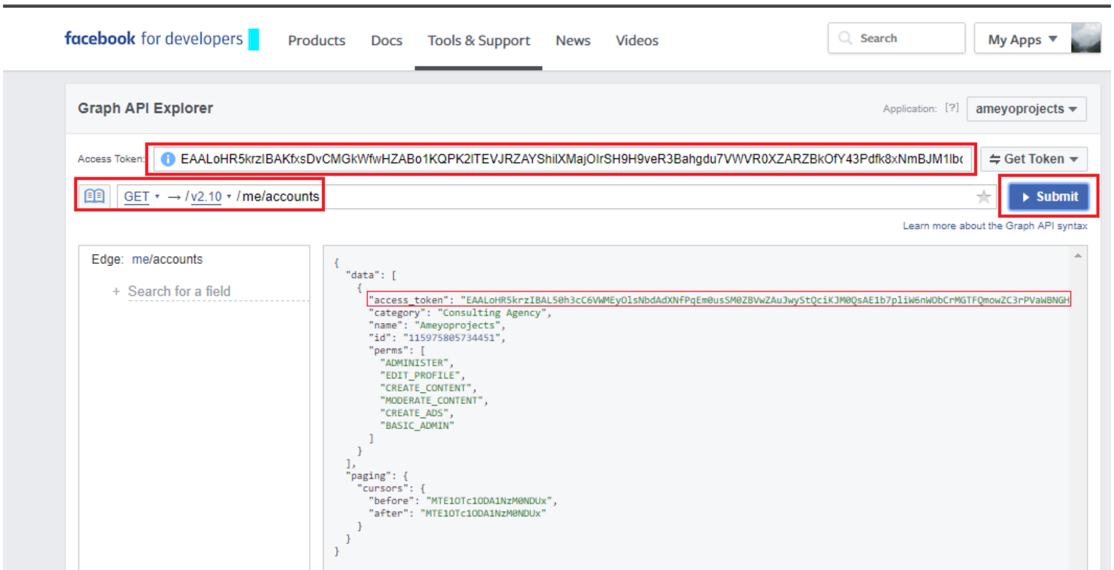


Figure: Required Access Token

10. This code is actually giving the access tokens for all of your Facebook pages and accounts. Note down the access token for your page. This is the final token.

8.2.3.1.5 Integrate your App in Ameyo

There are following two ways to integrate your App in Ameyo to create a media profile.

- Integration at Backend Without OAuth
- Integration using OAuth (Recommended Way)

(Normal Method) Integrate Facebok App at Backend

Now, you have the following prerequisites.

- username (Your Facebook Username)
- In the Facebook, user should be the Tester, Developer, or Admin of the Facebook App.

- App ID
- App Secret
- Access Token for your Facebook Page

Perform the following steps to integrate the Facebook App in Ameyo through backend.

1. Access the Operating System through Putty and execute the following commands to enter the PostgreSQL system.

   psql -U postgres

2. In the PostgreSQL console, execute the following command to enter your database.

   \c <DB_Name>

   Replace <DB_Name> with the name of database that has been integrated with your Ameyo App.

3. Execute the following command to enter Media Profile ID, Username, Access Token, App ID, and APP Secret in "facebook_profile" table.

   INSERT INTO facebook_profile (media_profile_id,user_name,access_token,app_key,app_secret,should_fetch_conversation) values ('<media_profile_id>','<user_name>','<access_token>','<app_id>','<app_secret>',true)

   Replace the following values.

Samle Attribute	**Required Value**
<media_profile_id>	Provide a unique ID for your media profile.
<user_name>	Facebook Username
<access_token>	Access Token

Samle Attribute	Required Value
<app_id>	App ID
<app_secret>	App Secret

4. Execute the following command to enter the Media Profile details in "media_profile" table.

   INSERT INTO media_profile (media_profile_id,media_entity_name,media_profile_type,fetch_timer_interval,is_incoming_allowed,is_outgoing_allowed,contact_center_id,escalation_priority) values ('<media_profile_id>','<media_entity_name>',<media_profile_type>,'180','t','t','1','100');

   Replace the following values.

Samle Attribute	Required Value
<media_profile_id>	Provide the same Media Profile ID that you have entered in "facebook_profile" table.
<media_entity_name>	Provide a unique name for your Media Profile. If you are creating multiple media profiles, make sure that all have unique names.
<media_profile_type>	Type FACEBOOK

5. Execute the following command to make an entry in "interaction_resolver_configuration".

   INSERT INTO interaction_resolver_configuration (media_profile_id,resolver) values ('<media_profile_id>','["socialmediainteractionresolvervalue"]');

Replace <media_profie_id> with the ID of your Media Profile that you have entered in "facebook_profile" table.

6. Now, execute the following command to exit from database console.

   \q

7. Execute the following command to restart the appserver service.

   ameyoctl service appserver restart

Facebook Media Profile has been created now. You have to submit your App for review to Facebok and then use this media profile in the campaign.

(Recommended Method) Integrate Facebook App via OAuth in Ameyo

It is the recommended method to integrate your Facebook App via OAuth in Ameyo Server. For this, you have to generate redirection URL for App, make entries at the backend, provide OAuth URL in Facebook App, and then integrate App in Ameyo through User Interface.

1. **Redirect URL:** Following will be redirect URL for your Facebook App in Ameyo Server.

   http://<App_Server_IP>:<PORT>/oauth/oauth/facebook

   Replace App_Server_IP with the IP Address of your Ameyo Server App, PORT with the Port Number where Ameyo Server is running (that can be 8888 by default).

2. **Commands for the Backend:** Perform the following steps.

   A. Access the Operating System through Putty and execute the following commands to enter the PostgreSQL system.

      psql -U postgres

   B. In the PostgreSQL console, execute the following command to enter your database.

      \c <DB_Name>

      Replace <DB_Name> with the name of database that has been integrated with your Ameyo App.

C. Execute the following command.

INSERT INTO APP_OAUTH_CONFIGURATION (CONSUMER_ID, SERVICE_PROVIDER, OAUTH_AUTHORIZATION_URL, OAUTH_AUTHORIZATION_REDIRECT_URL, OAUTH_SCOPE_VALUES, OAUTH_TOKEN_REQUEST_URL, OAUTH_TOKEN_REQUEST_REDIRECT_URL, OAUTH_REVOKE_ACCESS_URL, CLIENT_ID, CLIENT_SECRET, ERROR_PAGE, DESCRIPTION) VALUES (125,'FACEBOOK','https://www.facebook.com/v2.8/dialog/oauth',<redirect-url>,'publish_pages,read_page_mailboxes,manage_pages','https://graph.facebook.com/v2.8/oauth/access_token',<redirect-url>,'',<App-Id>,<App-Secret>,'http://<App_Server_IP>:<PORT>/oauth/error.html','');

Replace the following inputs.

- <redirect-url> with your redirect URL
- <App-Id> with your App ID
- <App-Secret> with your App Secret
- <App_Server_IP> with the IP Address of your App Server
- <PORT> with the Port Number where your App Server is running

D. Execute the following command.

INSERT INTO APP_OAUTH_REQUEST_PARAMETER (CONSUMER_ID, TYPE, PARAMETER_NAME, PARAMETER_VALUE) VALUES(125,'AUTH_REQUEST','response_type','code');

E. Execute the following command. INSERT INTO APP_OAUTH_REQUEST_PARAMETER (CONSUMER_ID, TYPE, PARAMETER_NAME, PARAMETER_VALUE) VALUES(125,'ACCESS_TOKEN_REQUEST','grant_type','authorization_code');

F. Execute the following command.

INSERT INTO APP_OAUTH_RESPONSE_PARAMETER (CONSUMER_ID, TYPE, PARAMETER_NAME) VALUES(125,'ACCESS_TOKEN_REQUEST','token_type');

3. **<u>Add Redirect URL in the Facebook App</u>:** Perform the following steps.

   A. Visit "Facebook Developers Portal" and login with your credentials.

   B. Go to "My Apps" and select your application.

   C. Select "Settings" in the left panel.

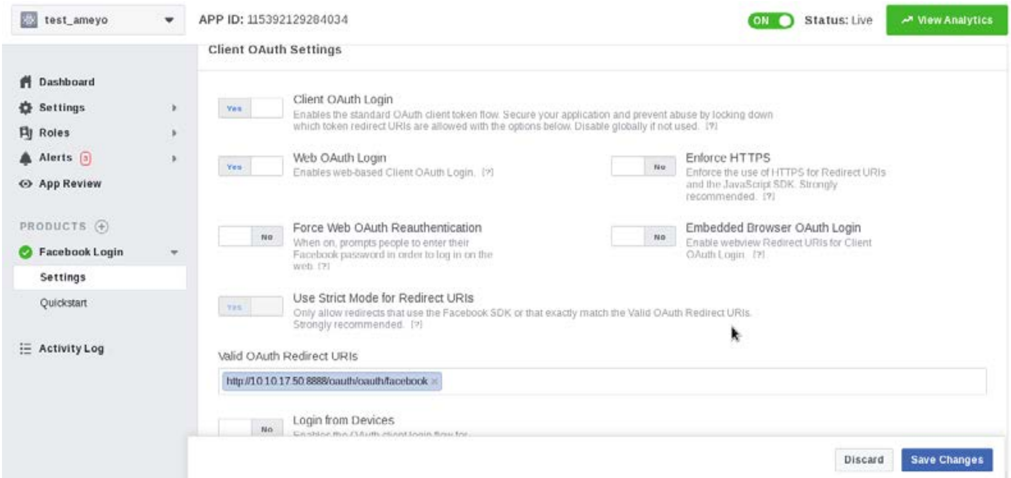


Figure: Providing OAuth URL in Facebook

   D. Here, you have to provide the OAuth URL in the box titled "Valid OAuth Redirect URIs".

   E. Click "Save Changes".

4. **<u>Integrate Facebook App in Ameyo Server</u>:**

   Perform the following steps to create a Facebook Media Profile.

   A. Go to "System" → "System Configuration".

   B. Click "Media Profile" tab.

   C. Click "Add" to create a media profile.

   D. Click "Continue with Facebook" to create a Facebook Messenger Media Profile using the following pop-up.

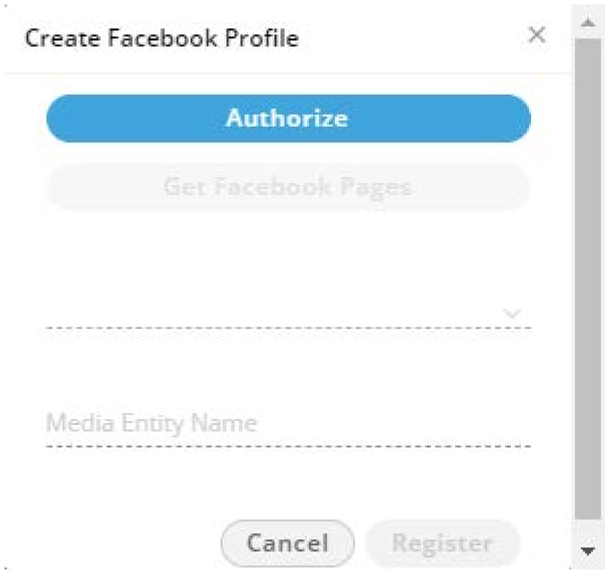


Figure: Add Facebok Media Profiile

E. Click "Authorize Facebook". It shows a pop-up, where you have to click "Continue" and then "Allow" to allow the Ameyo to access your account. It shows the list of pages in your Facebook account.

F. Select the required Facebok page.

G. Enter the name of your page and click "Register".

Your Facebok Media Profile is created.

8.2.3.1.6 Submit Your Facebook App for Review

Perform the following steps.

1. Visit "Facebook Developers Portal" and login with your credentials.
2. Go to "My Apps" and select your application.
3. Now, click "App Review" in the left panel. It shows the following page.

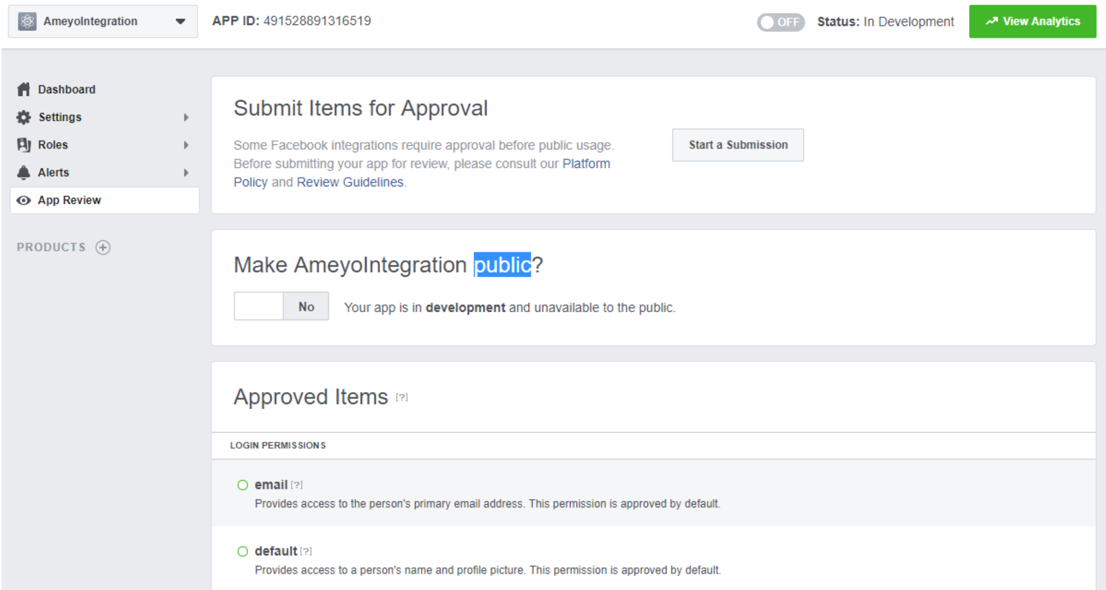


Figure: Submit your App for Review to Facebook

4. Click "Start a Submission" button. It shows the following pop-up.

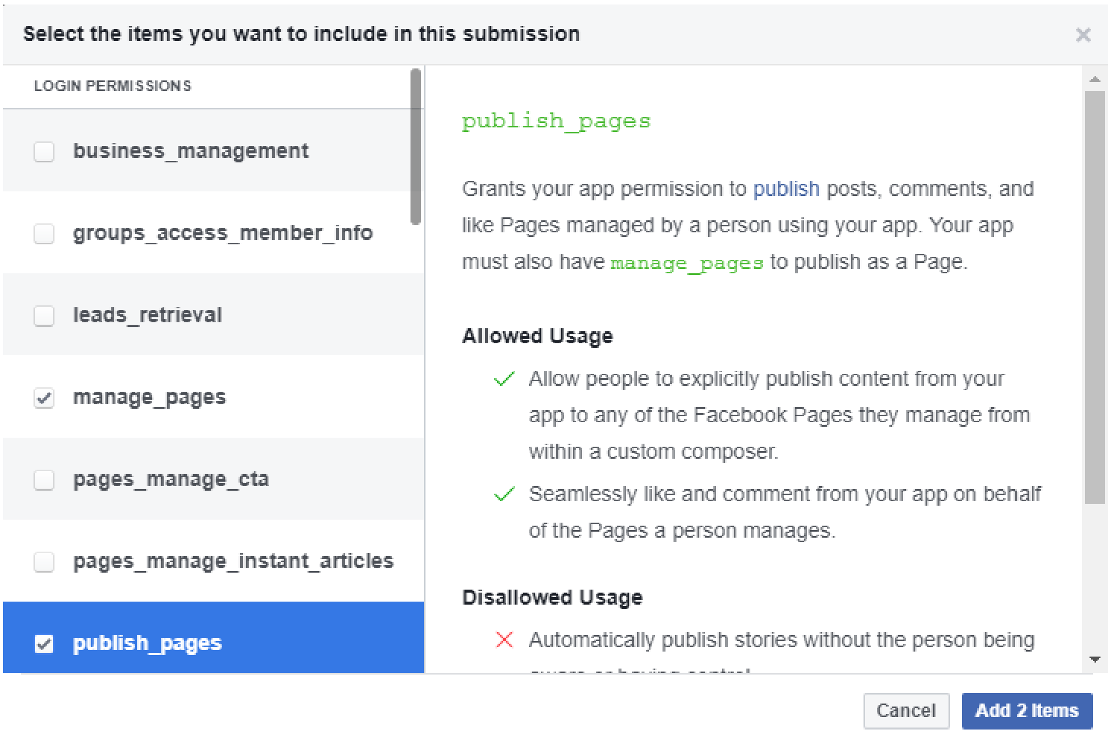


Figure: Select App Usage

5. Select "manage_pages" and "publish_pages" and click "Add 2 Items" button. It shows the following page.

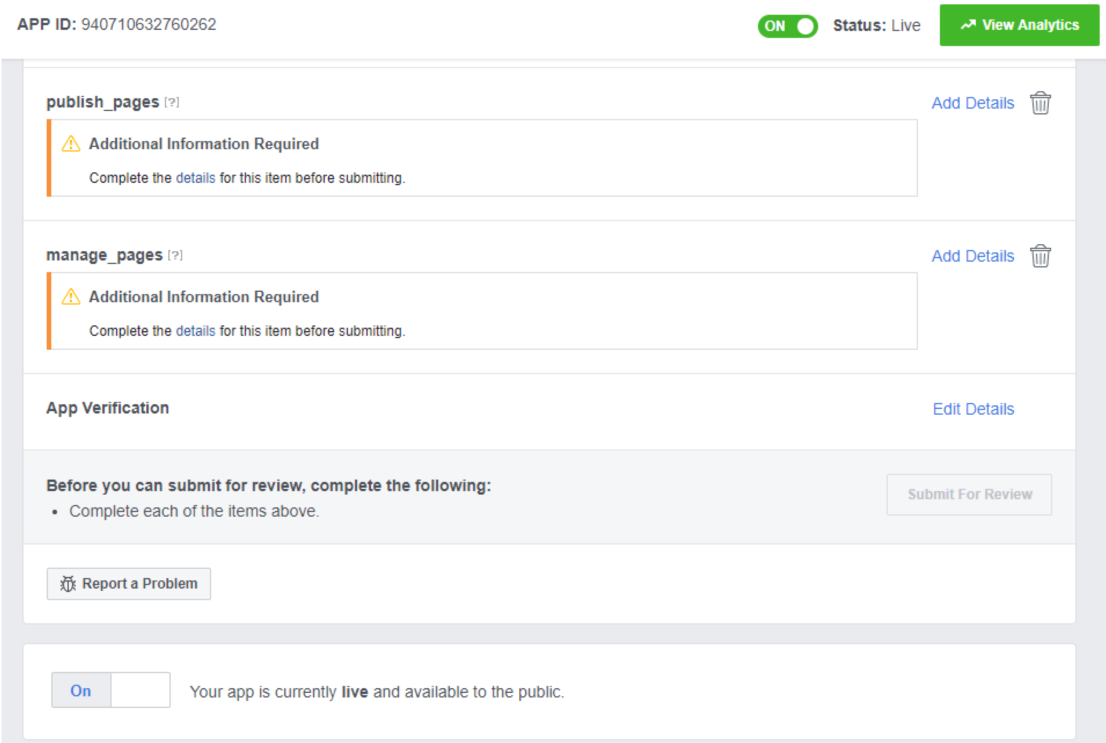


Figure: Add Details

6. Click "Add Details" for "publish_pages".

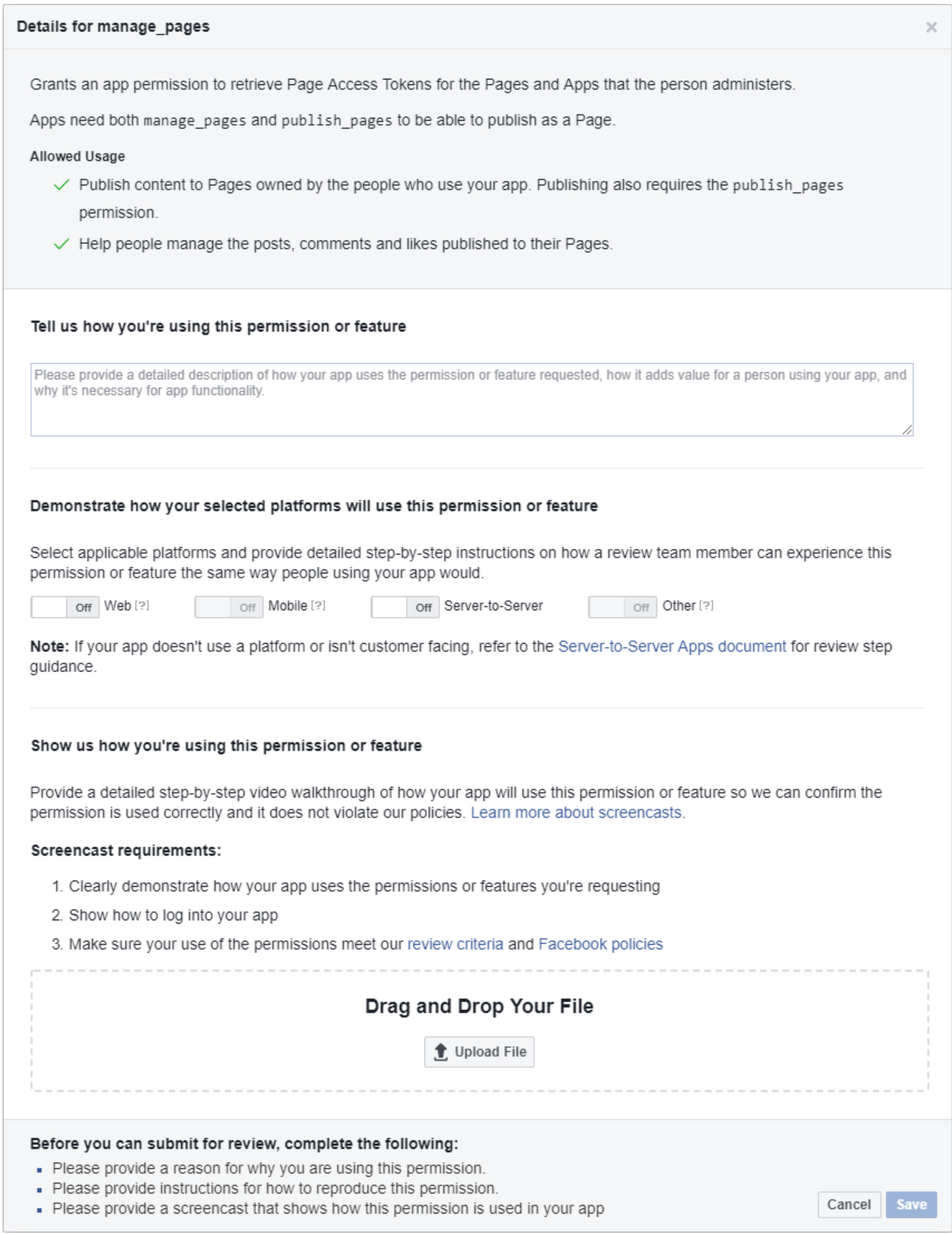


Figure: Add Details

7. Here, you have to provide the following inputs.

    A. **Tell us how you're using this permission or feature:** Click the following link to visit the next page, which contains the text that you can copy and paste in your Facebook App Submission page. Press the back button in the end of the page to come back at this point.

Required Content to Submit Facebook App

B. Click "Web" to select Web as your platform.

C. Now, you have to upload a Video that shows the screen recording of the steps documented in the pop-up (that opens upon clicking the button).

You can get this video from the Service Delivery Team.

D. Click Save.

8. Now, you have to repeat the same steps to add the details for "manage_pages".
9. Click "Submit for Review" button to submit the App for review.

After approval, you can normally use the Facebook Media Profile in the campaigns.

8.2.3.1.6.1 View and Modify Settings of Facebook Media Profile

Select a Facebook media profile in the list to view its settings on the right side under "Settings" tab.

Figure: Settings of Facebook Media Profile

You can modify the settings here and click "Apply" to apply the same. Rather, you can click "Refresh" to discard the changes.

8.2.3.1.7 Delete Facebook Media Profile

The deleted Facebook Media Profile cannot be retrieved back. The campaigns, queues, and users using this Media Profile will be disabled to use the Facebook to interact with your clients. Also, it is associated with your Facebook App. If you delete it now and again try to create a new

Facebok Profile, you have to go through the Command Line Interface to execute the commands and submit the App again to Facebook for review.

Perform the following steps to delete a Facebook media profile.

1. Select a Facebook media profile.
2. Click "Delete" to delete it. It shows the following warning message.

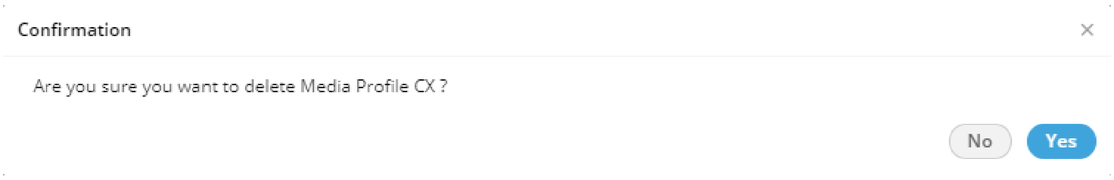


Figure: Asking to delete the Facebook Media Profile

3. Click "Yes" to delete the media profile. Rather, you can click "No" to not delete it.

8.2.3.1.7.1 Ticket Resolver for Facebook Profile

This tab lets you manage how the tickets in a campaign (where the selected media profile is added) will be handled. Following is a screenshot of Ticket Resolver Tab of Facebok Media Profile.

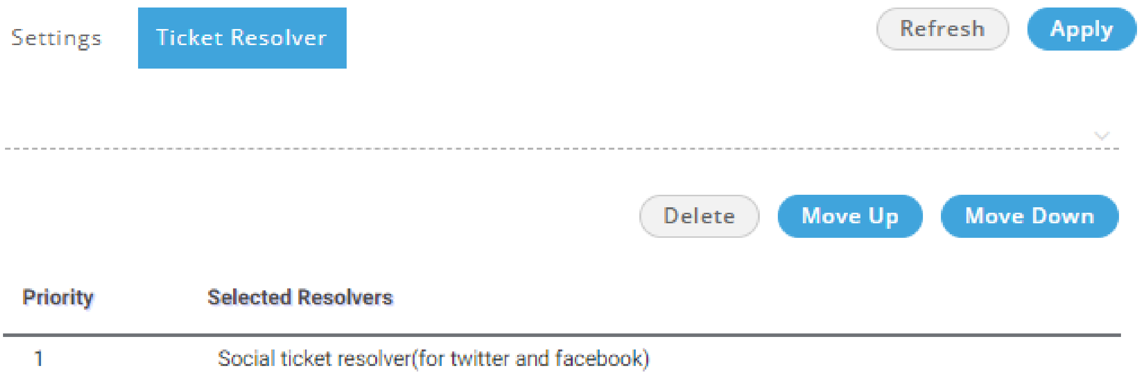


Figure: Ticket Resolver of Facebook Media Profile

8.2.3.2 Select the complete content, Copy it, and Paste in Facebook App Review.

Welcome to Facebook app working with Ameyo Server. Perform the following steps.

1. Go to https://<app_server>:<port>/app/.

   Replace "app_server" with the IP Address or the domain name where Ameyo Server is running and replace "port" with your Ameyo App Port Number.

2. Login with your credentials such as,

   username : Administrator

   password : XXXXXXXX

3. Go to "System" → "System Configuration" and click Media Profile Tab.
4. Click "Add" button.
5. Click "Continue with Facebook" to create a Facebook Media Profile.
6. Click "Authorize". Authorize it with your login credentials.

   username : <Facebook_UserName>

   password: XXXXXXX

7. Click "Authorize App Request" button.
8. It takes you back to Media Profile page. Click "Get Facebook Page" button.
9. It shows the Facebook Pages added in your account.
10. Select the Facebok Page that you want.
11. In the last tab, select the name you want for same.
12. Now, perform the following steps.

    A. Go to "Process" Tab and select your Interactive Campaign.

    B. Select "Media Profile" sub-tab.

    C. Push Facebook media profile configured to assigned media profiles.

    D. Click "Apply" button.

13. Go to "System" → "System Configuration" → "Rule" pager.
14. Click 'Add Rule'.
15. Put a name and description in the rule.

16. Click "Add New Condition" and select "Media Profile ID" where you have created the Facebook Media Profile.
17. Click "Add new Action", and select to route action from the drop-down menu.
18. Now select the campaign, queue, and users in respective fields.
19. Browse your Facebook Page in a Web browser or Mobile App, and post something on your wall.
20. Now, in your campaign at Ameyo, wait for two minutes and this post will be displayed.
21. Click the post to view it.
22. In Interaction, Details open the message. Here we will get the Facebook post.
23. Options to Like and Comment are also available here.
24. You can click "Like" button for both posts and comment.
25. To comment, you can write the comment in the box and click "Send".
26. After sometime, the notifications on Facebook will start to appear for the like and comments made through Ameyo Application.

Thank You

8.2.4 Twitter Media Profile

You can create Twitter Media Profile using your Twitter Handle and interact with your clients on Twitter from here. It is requried to perform the following steps sequentially for creating a Facebook Messenger Media Profile.

1. **Create Twitter Account**
2. **Apply for a Twitter Developer Account**
3. **Create Twitter App**
4. **Integrate the Twitter App with Ameyo**

5. **Submit Your App to Twitter for Review**

8.2.4.1 Create Twitter Account

If you do not have a Twitter Account already, perform the following steps to createa a Twitter Account.

1. Visit **Twitter.com** and click "Sign Up" button. It takes you to "Sign Up" page.
2. Follow the onscreen instructions to create your Twitter Account.

> Please refer to "Signing up with Twitter" page for more information.

3. Make sure to verify your email address and phone number while

8.2.4.2 Apply for Twitter Developer Account

Perform the following steps to create a Twitter Developer Account. After creation, you have to submit it for approval. Once approved, you can go ahead to create a Twitter App and integrate it in your Ameyo Server.

1. Visit "Twitter Developer Portal" page and click "Sign In" button on the top right corner. It takes you to "Login" page.
2. Login with your credentials. It takes you back to the Twitter Developer Portal.
3. Click "Apply" on the top right corner to apply for a Twitter Developer Account. It takes you to the following page.

Figure: Twitter Developer Portal

4. Click "Apply for a Developer Account" button. It shows the following page.

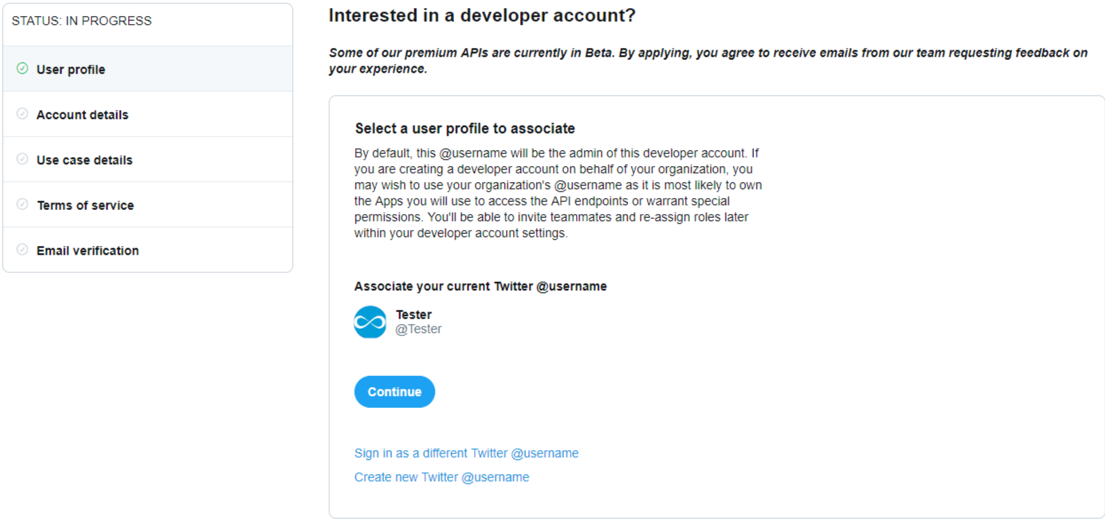


Figure: Use Your Profile as Developer Account

5. Click "Continue" to use this account as a Developer Account. It shows the following page, which asks for the details to create a Developer Account.

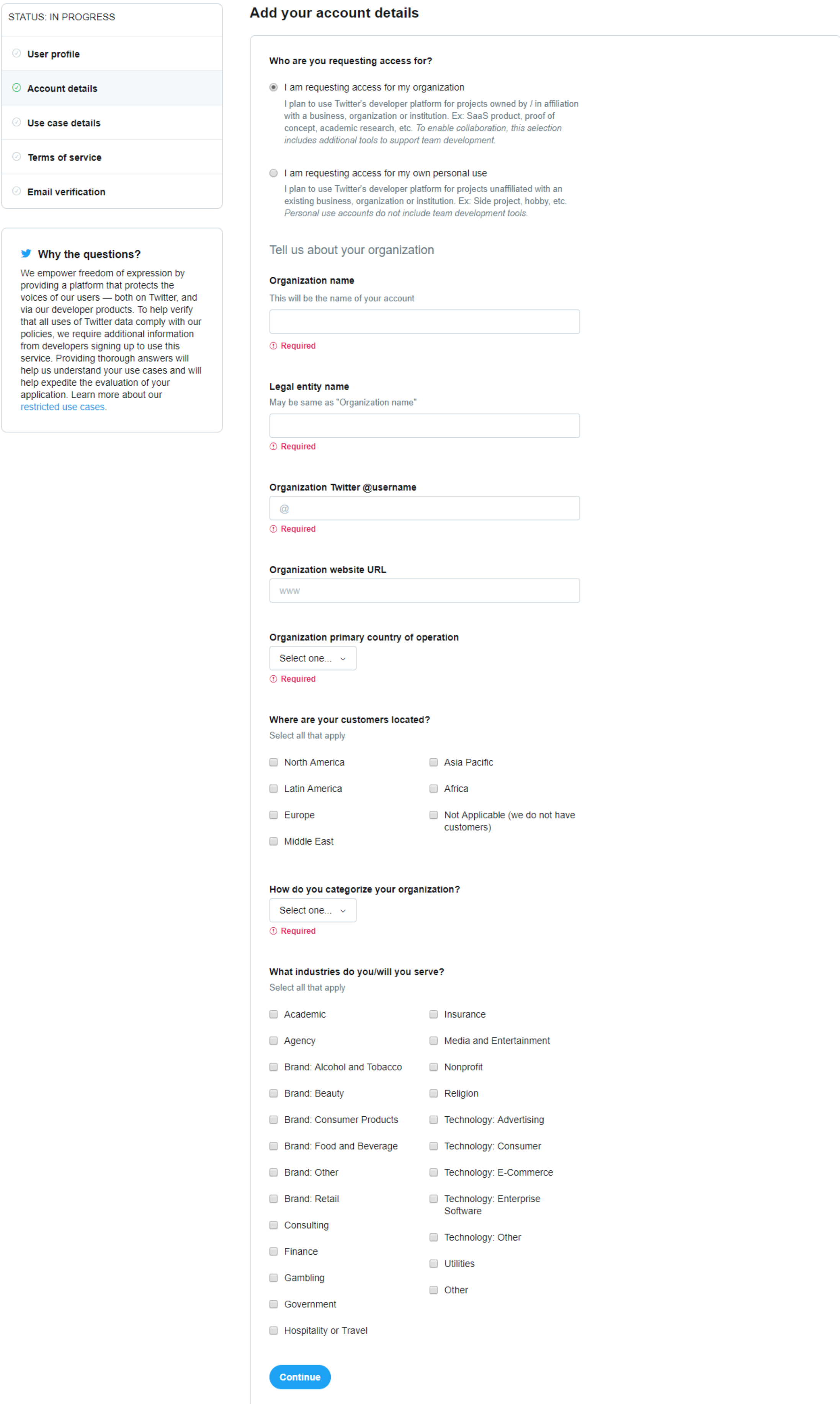

STATUS: IN PROGRESS
User profile
Account details
Use case details
Terms of service
Email verification
Why the questions?
We empower freedom of expression by providing a platform that protects the voices of our users — both on Twitter, and via our developer products. To help verify that all uses of Twitter data comply with our policies, we require additional information from developers signing up to use this service. Providing thorough answers will help us understand your use cases and will help expedite the evaluation of your application. Learn more about our restricted use cases.
Add your account details
Who are you requesting access for?
I am requesting access for my organization
I plan to use Twitter's developer platform for projects owned by / in affiliation with a business, organization or institution. Ex: SaaS product, proof of concept, academic research, etc. To enable collaboration, this selection includes additional tools to support team development.
I am requesting access for my own personal use
I plan to use Twitter's developer platform for projects unaffiliated with an existing business, organization or institution. Ex: Side project, hobby, etc. Personal use accounts do not include team development tools.
Tell us about your organization
Organization name
This will be the name of your account
Required
Legal entity name
May be same as "Organization name"
Required
Organization Twitter @username
@
Required
Organization website URL
www
Organization primary country of operation
Select one...
Required
Where are your customers located?
Select all that apply
North America
Asia Pacific
Latin America
Africa
Europe
Not Applicable (we do not have customers)
Middle East
How do you categorize your organization?
Select one...
Required
What industries do you/will you serve?
Select all that apply
Academic
Insurance
Agency
Media and Entertainment
Brand: Alcohol and Tobacco
Nonprofit
Brand: Beauty
Religion
Brand: Consumer Products
Technology: Advertising
Brand: Food and Beverage
Technology: Consumer
Brand: Other
Technology: E-Commerce
Brand: Retail
Technology: Enterprise Software
Consulting
Technology: Other
Finance
Utilities
Gambling
Other
Government
Hospitality or Travel
Continue

Figure: Asking for Account Details

6. Here, you have to provide the following details.
    A. **Who are you requesting access for?:** Select "I am requesting access for my organization". The other fields will be displayed.
    B. **Organization Name:** Provide the name of your oganization.
    C. **Legal Entity Name:** Provide the Legal Entity Name of your organization.
    D. **Organization Website URL:** Provide the Website URL of your organization.
    E. **Organization Primary Country of Operation:** Select the name of country from where your orgnaization operates.
    F. **Where are your customers located?:** Select the areas where your customers are located.
    G. **How do you categorize your organization?:** Select the category applicable for your organization.
    H. **What industries do you/will you serve?:** Select the industries which you serve.
7. After providing the details, click "Continue". It shows the next page.

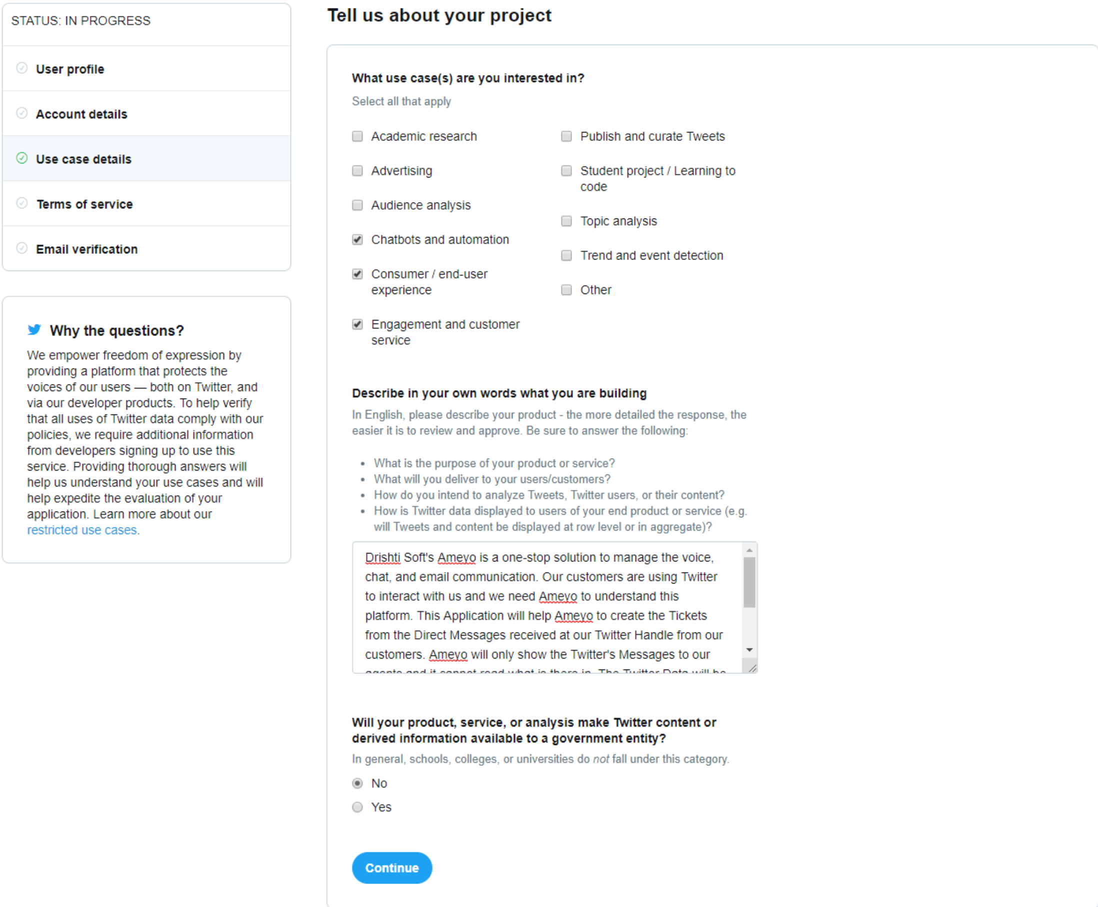


Figure: Asking for Use Case Details

8. Here, you have to provide the following details.

    A. **What use case(s) you are interested in?:** Select the required use cases of your application. For Ameyo, it can be the following options.

    - Chatbots and Automation
    - Consumer / End User Experience
    - Engagement and Customer Service

    You can more options, as per requirement.

    B. **Describe in your own words what you are building:** As per it's description says, you have to explain the following items.

    - Purpose of your product or service

- What will be delivered to your customers?
- How do you analyze Tweets, Twitter users, or their content?
- How will you display the Twitter data to users of your end product or service?

C. **Will your product, service, or analysis make Twitter content or derived information available to a government entity?:** Click "No" if you are not a Government entity.

9. Click "Continue" to proceed further. The next page shows the Twitter's Terms of Service.

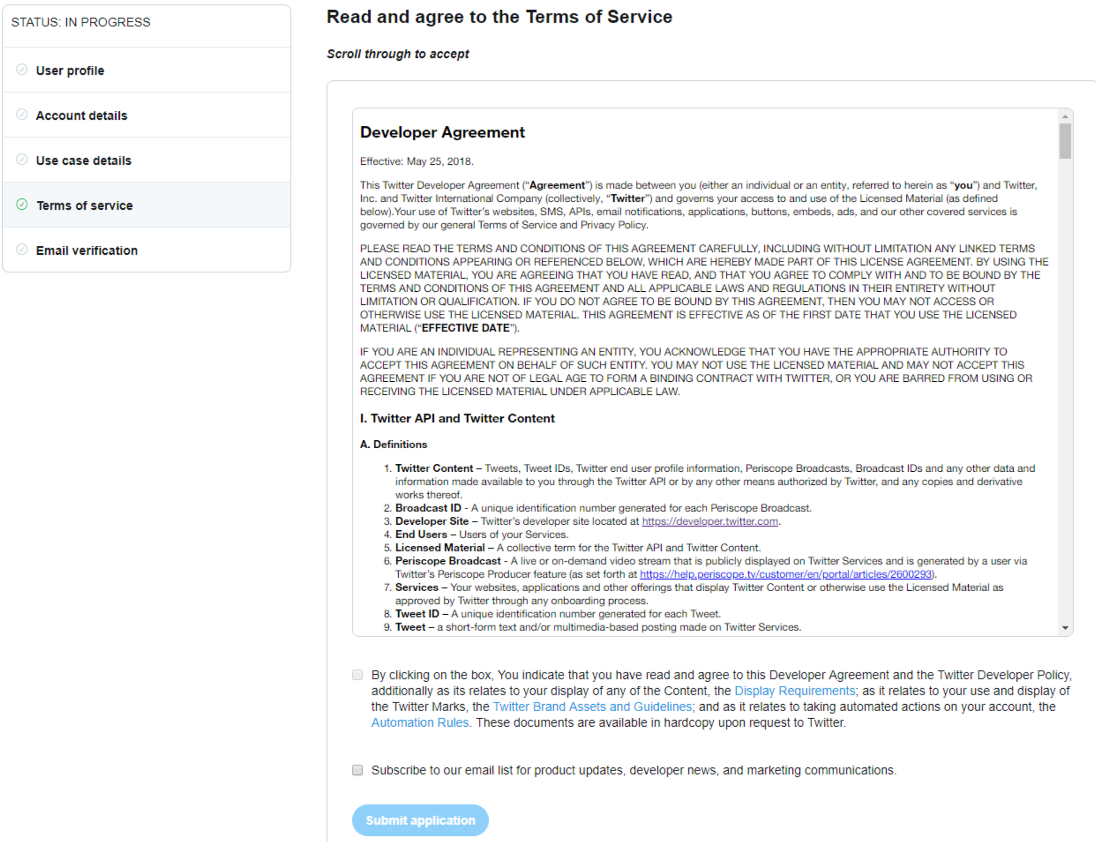


Figure: Terms and Conditions

10. Read the Terms and Conditions carefully as it will be an Agreement between Twitter and your Organization.
11. Click "Submit Applciation" button. It takes you the next page.

12. Verify your Email Address on this page.

Now, you have to wait for the approval for your Developer Account. After approval, you can proceed to create a Twitter App.

8.2.4.3 Create Twitter App

Perform the following steps to create a Twitter App.

You can create a Twitter App only when you have an approved Twitter Developer Account.

1. Visit "Twitter Apps Portal" page and click "Sign In" button on the top right corner. It takes you to "Login" page.
2. Login with your credentials. It shows the following page.

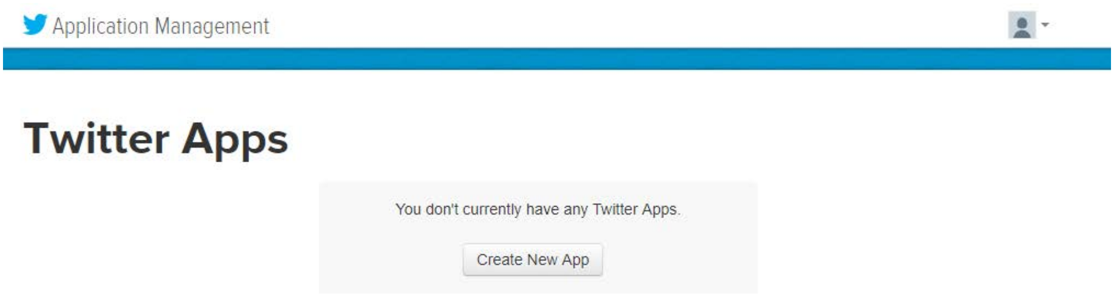


Figure: Twitter App Management

3. Click "Create New App" button. It shows the following page.

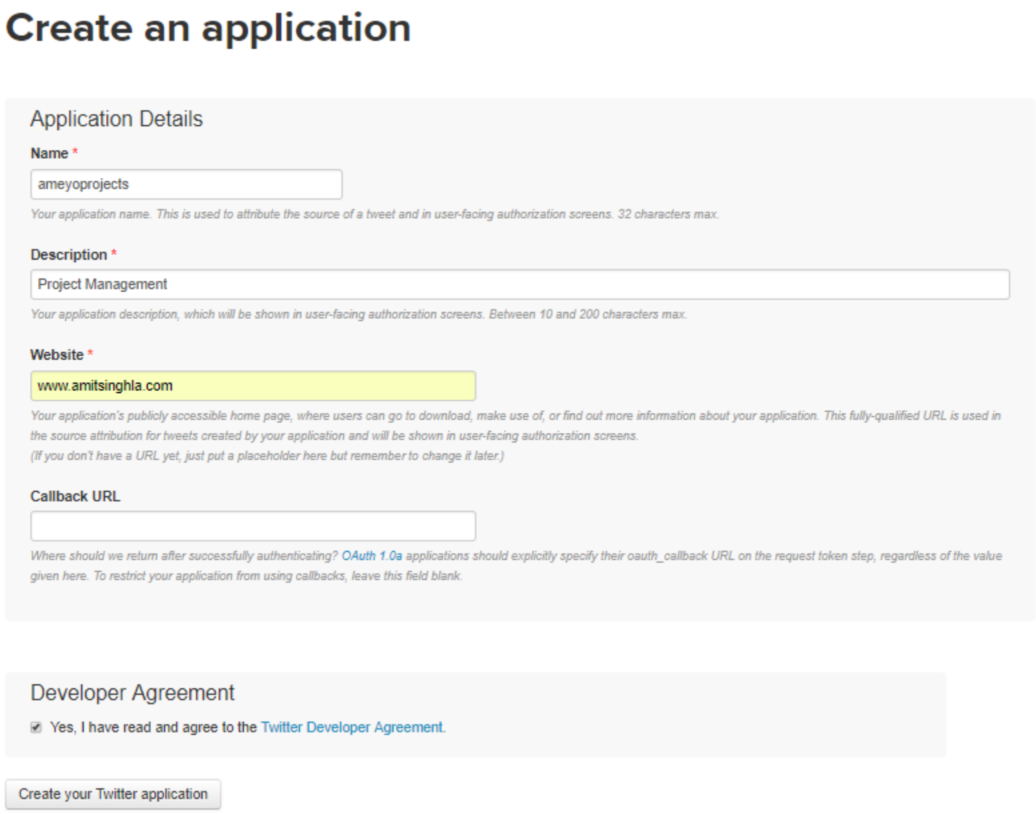


Figure: Create Twitter App

4. Provide the following details here.
   A. Name of your App
   B. Description
   C. Website URL
   D. Callback URL
5. Click "Yes" to agree with the terms and conditions.
6. Click "Create your Twitter Application."

Now, your Twitter App will be submitted for approval. After approval, it will be registered with Twitter.

8.2.4.4 Create an Access Token

Perform the following steps to create an access token for your Twitter App.

1. Visit "Twitter Apps Portal" page and click "Sign In" button on the top right corner. It takes you to "Login" page.
2. Login with your credentials. It shows all of your Twitter App.
3. Select your Twitter App to open its page.

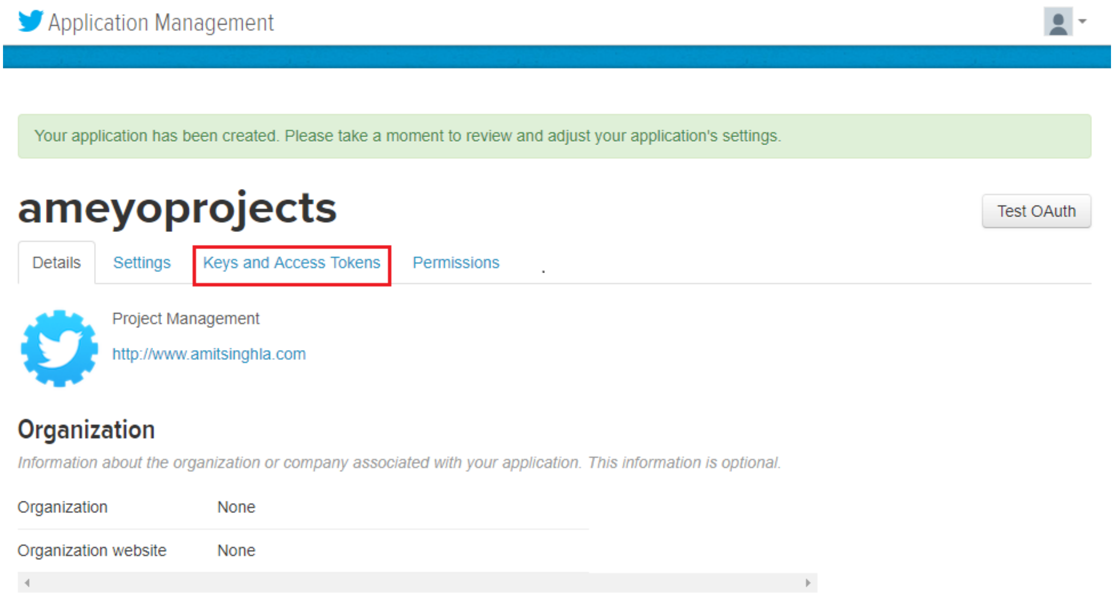


Figure: Twitter App Page

4. Switch to "Key and Access Tokens" Page.

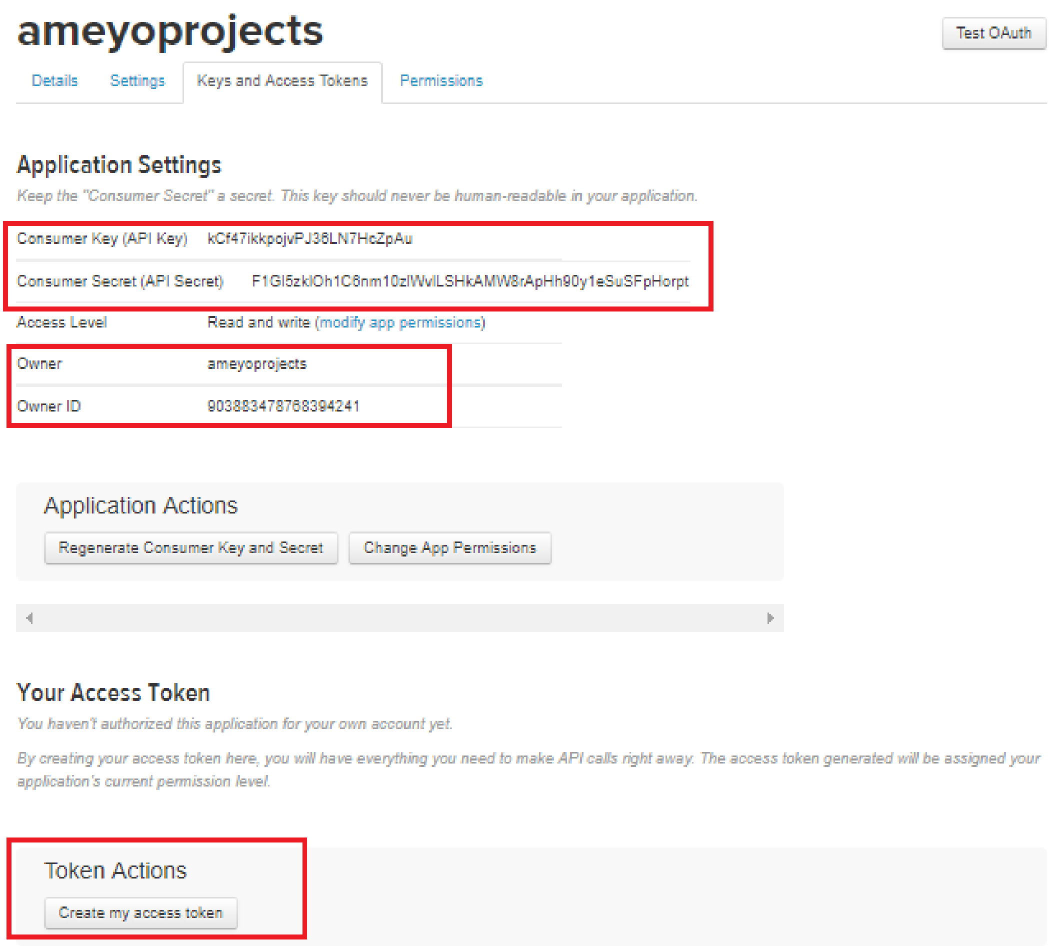


Figure: Keys and Token Page

5. Click "Create my access token" to generate the access token.

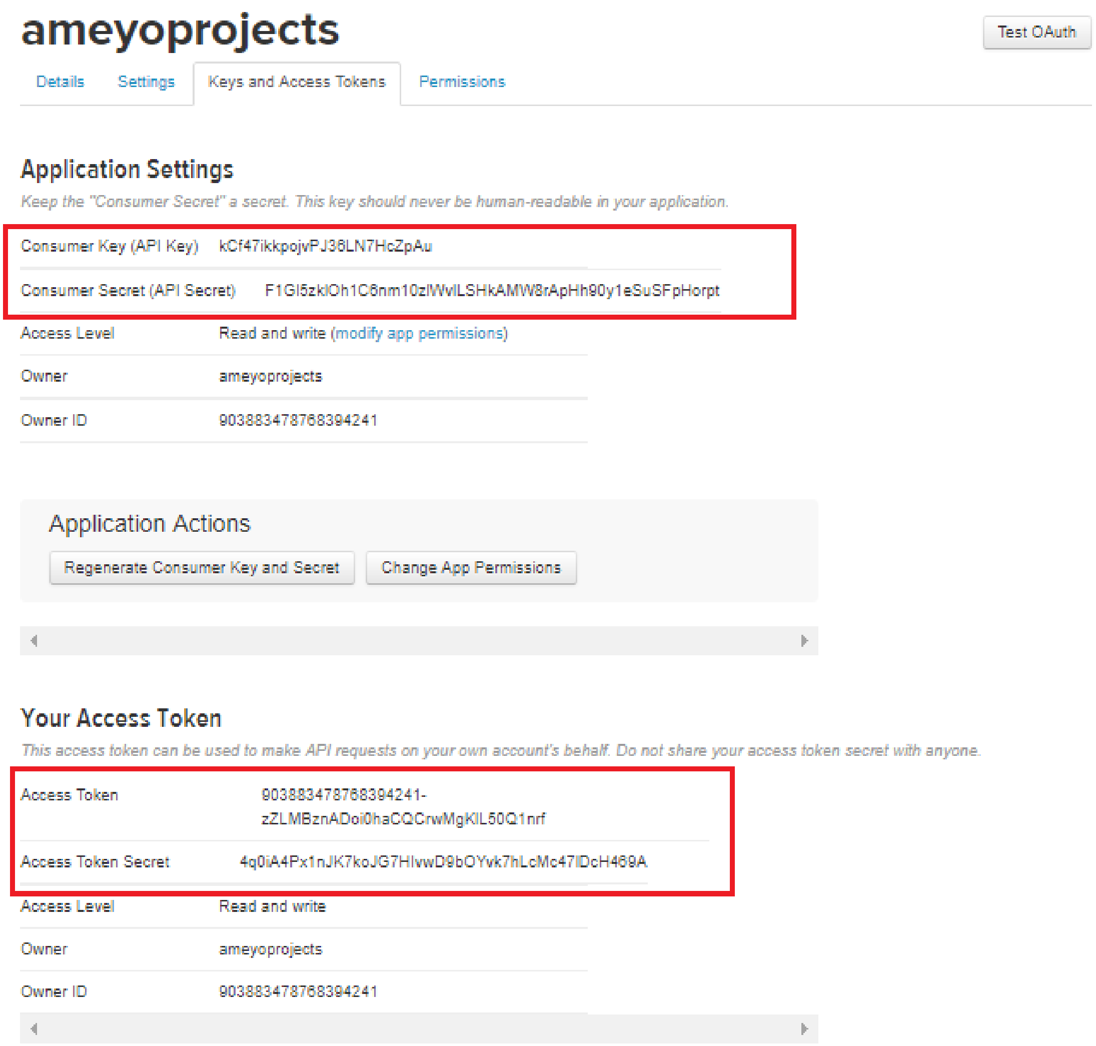


Figure: Access Token

6. Note down the following items.

   - Twitter Username
   - Consumer Key
   - Consumer Secret
   - Access Token
   - Access Token Secret

8.2.4.5 Integrate the Twitter App with Ameyo

Perform the following steps to integrate the Twitter App in Ameyo through backend.

1. Access the Operating System through Putty and execute the following commands to enter the PostgreSQL system.

   psql -U postgres

2. In the PostgreSQL console, execute the following command to enter your database.

   \c <DB_Name>

   Replace <DB_Name> with the name of database that has been integrated with your Ameyo App.

3. Execute the following command to enter Media Profile ID, Screen Name, Access Token, Access Token Secret, Consumer Key, and Consumer Secret in "twitter_profile" table.

   INSERT INTO twitter_profile (<media_profile_id>, <screen_name>, <accesstoken>, <access_token_secret>, <consumer_key>, <consumer_secret>, should_fetch_messages) VALUES ('mediaProfilehereid', 'screenName', 'accessToken', 'accessTokenSecret', 'consumerKey', 'consumerSecret', 'true');

   Replace the following fields.

Samle Attribute	**Required Value**
<media_profile_id>	Provide a unique ID for your media profile.
<screen_name>	Twitter Handle
<accesstoken>	Access Token
<access_token_secret>	Access Token
<consumer_key>	Consumer Key

Samle Attribute	Required Value
<consumer_key>	Consumer Secret

4. Execute the following command to enter the Media Profile details in "media_profile" table.

   INSERT INTO media_profile(contact_center_id, media_profile_id, media_entity_name, media_profile_type, fetch_timer_interval, is_incoming_allowed, is_outgoing_allowed) VALUES ('<contact_center_id>', '<media_profile_id>', '<media_entity_name>', '<media_profile_type>', '60', true, true);

   Replace the following values.

Samle Attribute	Required Value
<contact_center_id>	Provide the ID of the Contact Center where you want to create this Twitter Media Profile.
<media_profile_id>	Provide the same Media Profile ID that you have entered in "twitter_profile" table.
<media_entity_name>	Provide a unique name for your Media Profile. If you are creating multiple media profiles, make sure that all have unique names.
<media_profile_type>	Type TWITTER.

5. Execute the following command to make an entry in "interaction_resolver_configuration".

INSERT INTO interaction_resolver_configuration (media_profile_id, resolver) VALUES ('<media_profile_id>', '["socialmediainteractionresolvervalue"]');

Replace <media_profie_id> with the ID of your Media Profile that you have provided in "twitter_profile" table.

6. Now, execute the following command to exit from database console.

   \q

7. Execute the following command to restart the appserver service.

   ameyoctl service appserver restart

Twitter Media Profile has been created now. You can now use this media profile in the campaign.

8.2.4.5.1 View and Modify Settings of Twitter Media Profile

Select a Twitter media profile in the list to view its settings on the right side under "Settings" tab.

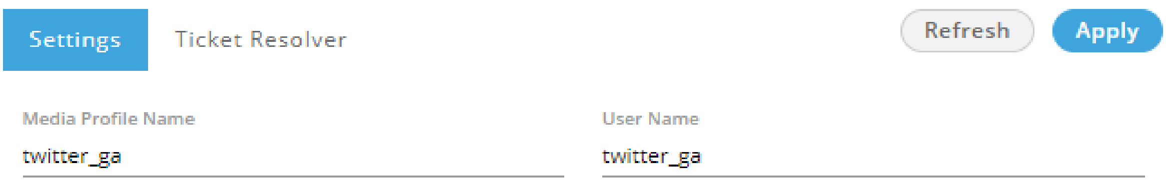


Figure: Settings of Twitter Media Profile

You can modify the settings here and click "Apply" to apply the same. Rather, you can click "Refresh" to discard the changes.

8.2.4.6 Delete Twitter Media Profile

The deleted Twitter Media Profile cannot be retrieved back. The campaigns, queues, and users using this Media Profile will be disabled to use the Twitter to interact with your clients. Also, it is associated with your Twitter App. If you delete it now and again try to create a new Twitter Profile, you have to go through the Command Line Interface to execute the commands. Also, you may have to re-submit the App again to Twitter for review.

Perform the following steps to delete a Twitter media profile.

1. Select a Twitter media profile.
2. Click "Delete" to delete it. It shows the following warning message.

Figure: Asking to delete the Twitter Media Profile

3. Click "Yes" to delete the Twitter media profile. Rather, you can click "No" to not delete it.

8.2.4.6.1 Ticket Resolver for Twitter Profile

This tab lets you manage how the tickets in a campaign (where the selected media profile is added) will be handled. Following is a screenshot of Ticket Resolver Tab of Twitter Media Profile.

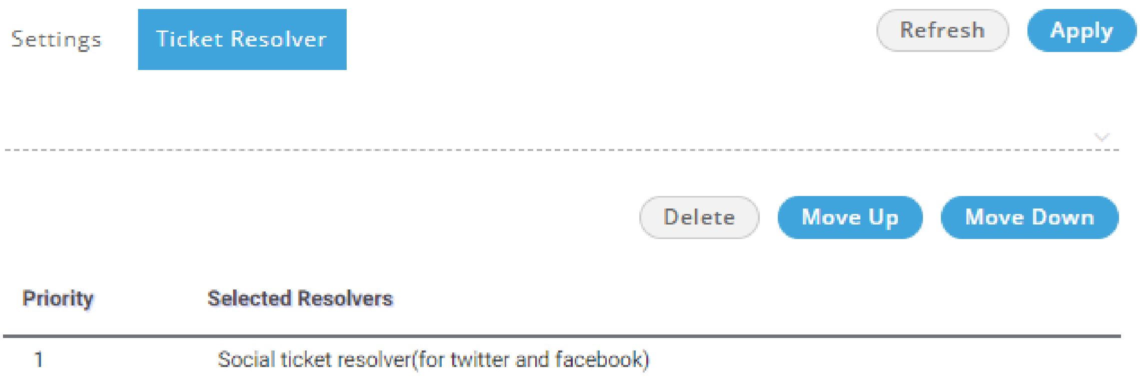


Figure: Ticket Resolver of Twitter Media Profile

8.3 Canned Messages

Canned messages are predefined reply templates which can be used to quickly send out replies to tickets. A category is associated with each canned message, according to which agent can select canned message. Click "Canned Messages" Tab in to view the canned messages and their categories.

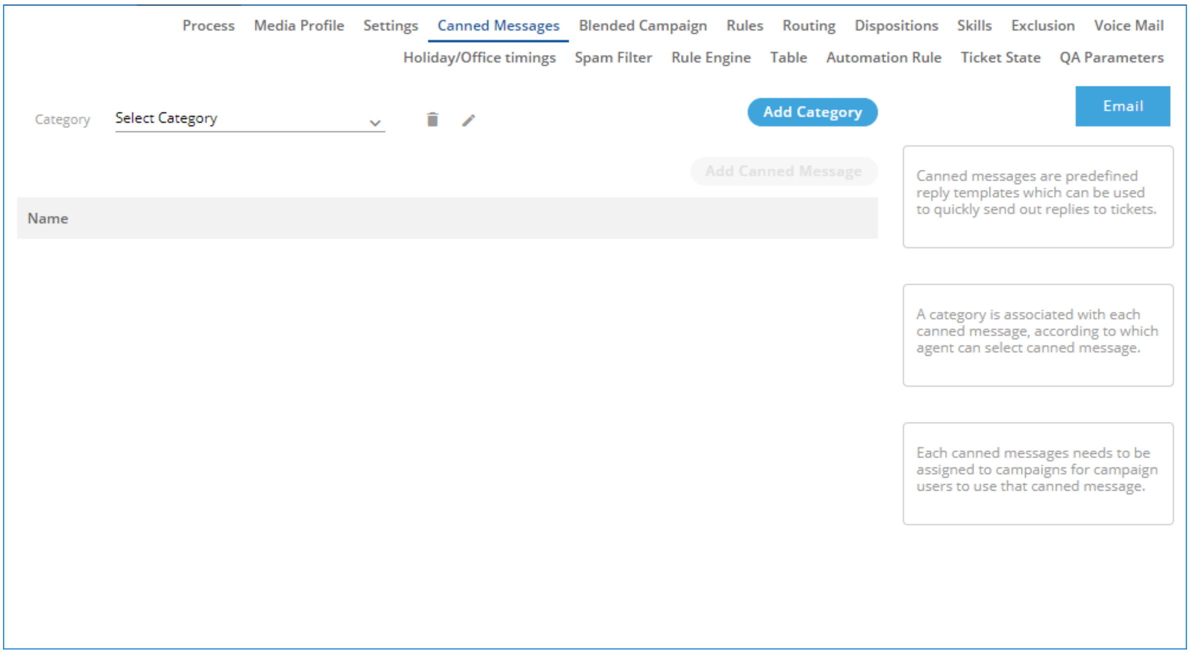


Figure: Canned Messages Tab

Here, you can perform the following functions.

8.3.1 Create Category

Perform the following steps to create a category of Canned Messages.

1. Click "Add Category" button. It shows the following pop-up.

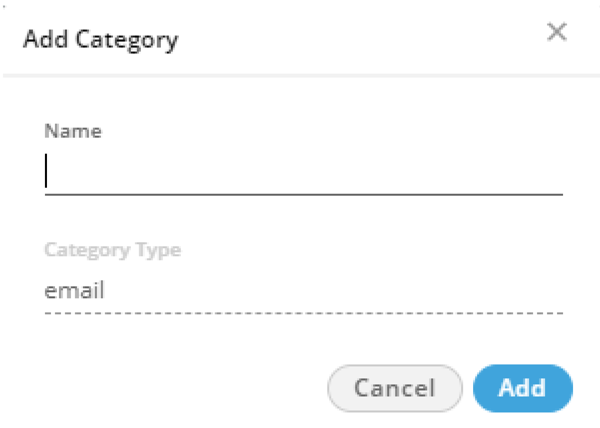


Figure: Add Category of Canned Messages

2. Provide a name for the category.
3. Click "Add". The category is created and listed in the drop-down menu.

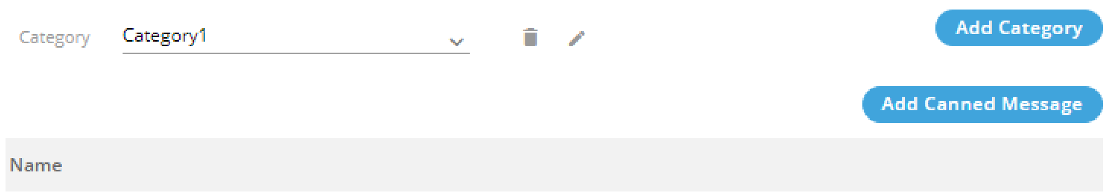


Figure: Added a Category of Canned Messages

8.3.2 Modify a Category

Perform the following steps to edit a category of Canned Messages.

1. Select the category from the drop-down menu and click icon to edit the category using the following pop-up.

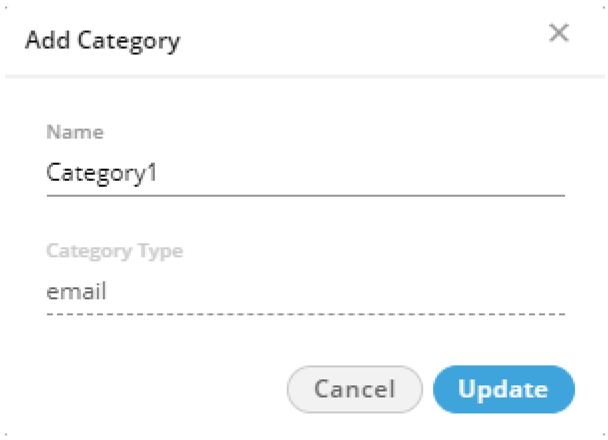


Figure: Modify a Category of Canned Messages

2. You can only change the name of category. You cannot change the category type.
3. Click "Update" to modify the category else click "Cancel" to discard the changes.

8.3.3 Delete a Category

Perform the following steps to delete a category.

1. Select the category from the drop-down menu and click icon to delete the category.
2. The following warning message is displayed on the screen.

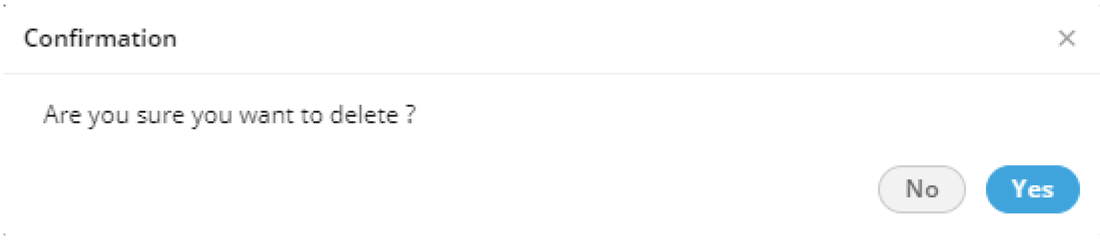


Figure: Asking to Delete a Category of Canned Messages

3. Click "Yes" to delete the category else click "No" to keep it.

8.3.4 Create a Canned Message in a Category

Perform the following steps to create a canned message in a category.

1. Select the category from the drop-down menu.
2. Click "Add Canned Message" to add a canned message using the following pop-up.

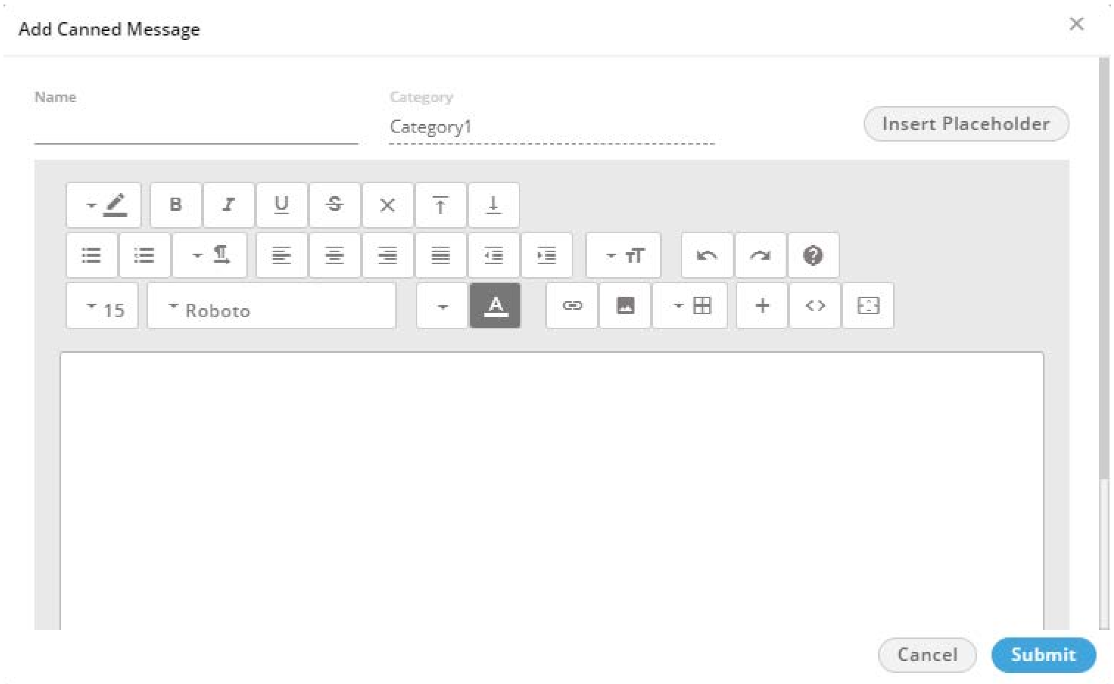


Figure: Add a Canned Message

3. Provide a name of the canned message.

4. You can type the message in the textarea.

5. You can click "Insert Placeholder" button to add any placeholder displayed in the following screenshot.

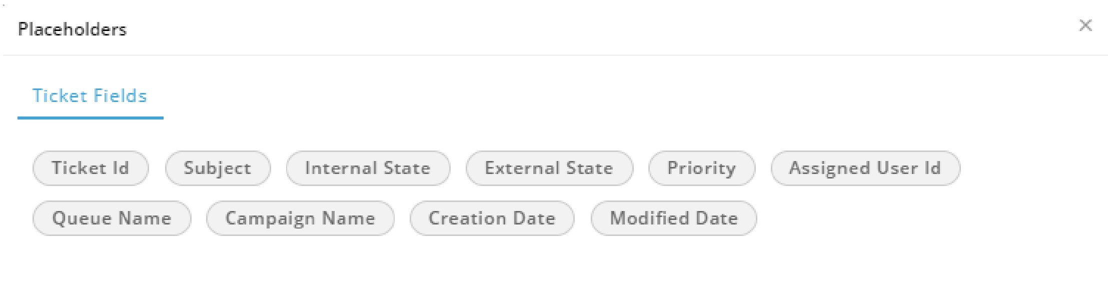


Figure: Placeholders

6. Following is a sample canned message.

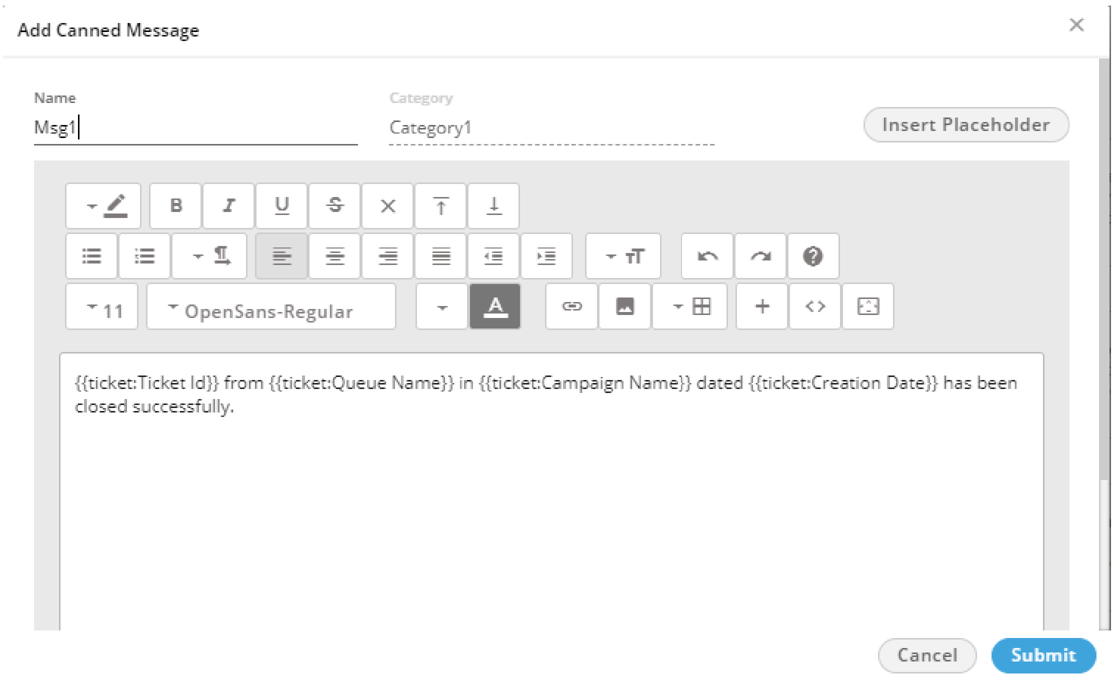


Figure: Sample Canned Message

7. Click "Submit". It lists the canned message in the whitearea.

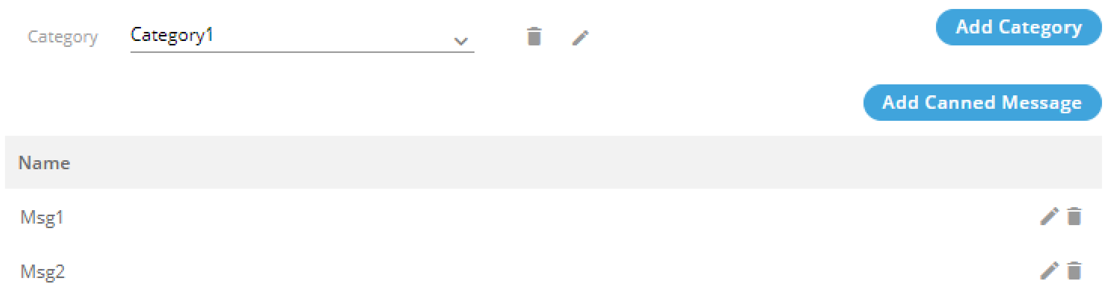


Figure: Added Canned Messages

You can edit and delete the canned messages.

You have to assign the canned messages in the campaign so that the users in that campaign can use them.

8.4 Blended Campaign (Licensed Feature)

Blending simply means a group of inbound and outbound campaigns. It allows the agents to login in a predefined set of campaigns simultaneously. The same agent can login in Inbound as well as in Outbound campaign at the same time. Click "Blended Campaign" tab in "System Configuration" to access its settings. Here, Admin can select the campaigns which need to be blended from the available list.

In Blended Campaign, the Inbound (Interactive Voice Application) Campaigns are given more priority over other campaigns. It helps to decrease the Call Drop Count for incoming (inbound) calls.

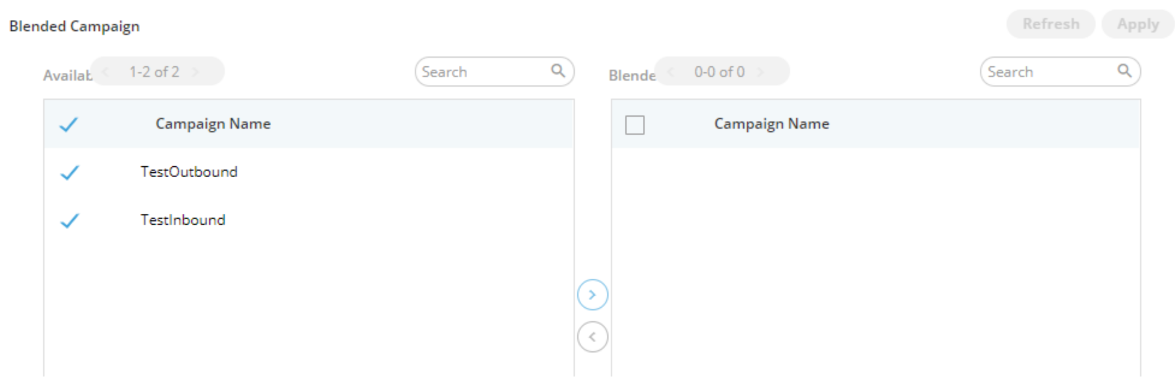


Figure: Blended Campaign

After selecting the campaigns, click  icon to add it to the list of blended campaign. After selecting the required campaigns click "Apply" button to create a blend.

8.5 Rules

8.5.1 Rules

"Rules" Tab in "System Configuration" allows you create the rules for the media profiles.

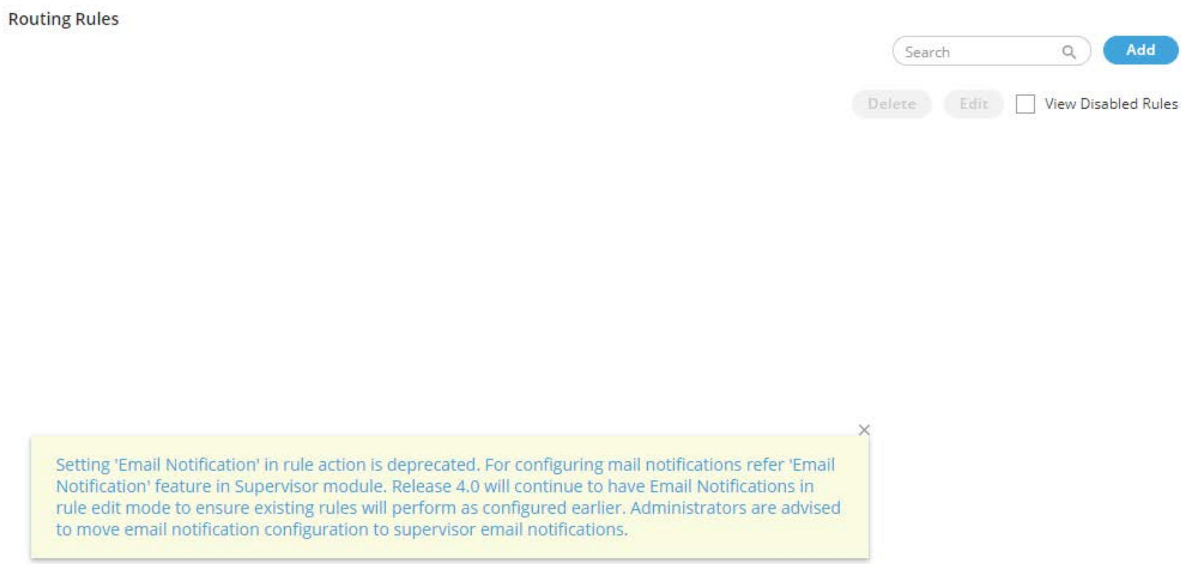


Figure: Rules

You cannot create the rules to show the notifications here. Please check "Email Notification Configuration" in Supervisor Console for the same.

You can add, modify, delete, enable, and disable the rules.

8.5.1.1 Add a Rule

Perform the following steps to add a rule.

1. Click "Add Rule" button in the right side. It shows the following page.

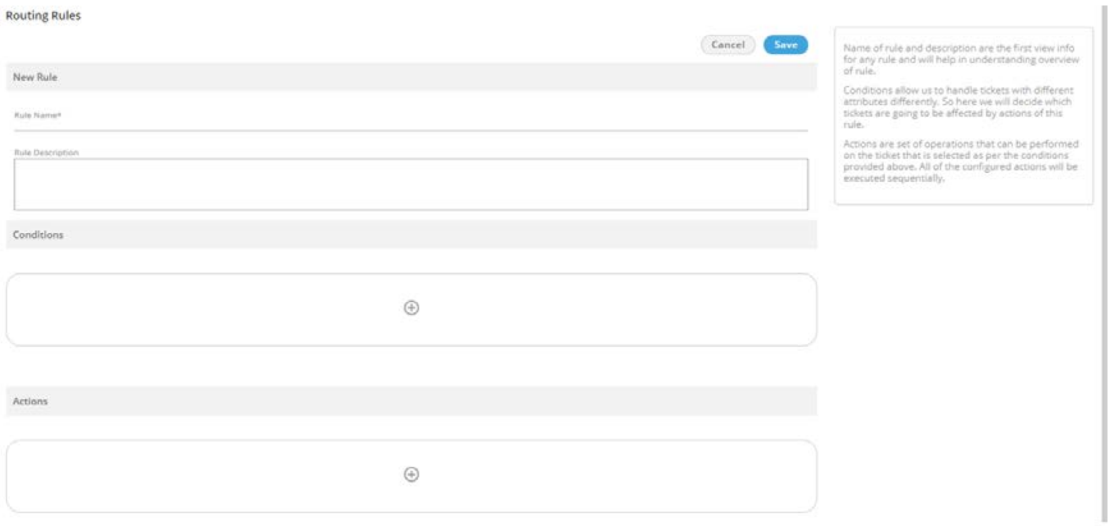


Figure: Adding a Rule

2. **Rule Name:** Provide a name for your rule.
3. **Rule Description:** Provide a description for your rule.
4. **Conditions:** Here, you can specify the conditions based upon which the actions will be taken. Perform the following steps.
    A. Click ⊕ icon in the middle of "Condition" box to add a new condition. It shows the following section.

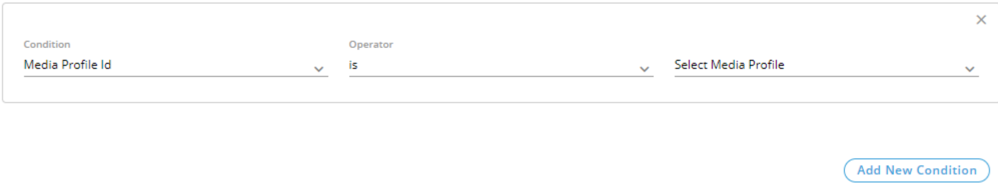


Figure: Add a Condition

B. Click "Condition" drop-down menu to select any of the following conditions.

I.

II. **Interaction Title:** Select it to add a condition based upon the title of interaction. When you select it, the other two fields are changed. The operator drop-down menu has the following options for "Interaction Title" condition.

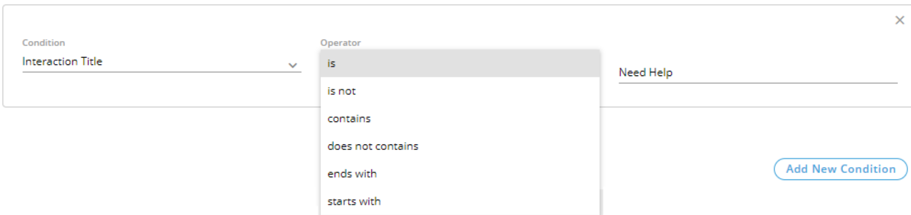


Figure: Interaction Title Condition

- is
- is not
- contains
- does not contain
- ends with
- starts with

These operators are self-explanatory. After selecting an operator, provide a value in the adjoining text field.

III. **To:** Select it to add a condition based upon "To" field of the interaction that contains the name of recipient. It contains following operators.

- contains

- does not contain

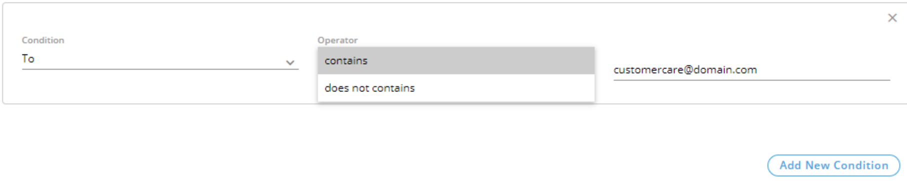


Figure: "To" Condition

Provide a value in the adjoining text field after selecting an operator.

IV. **Message:** Select it to add a condition based upon the message body. It contains the following operators.

- contains
- does not contain

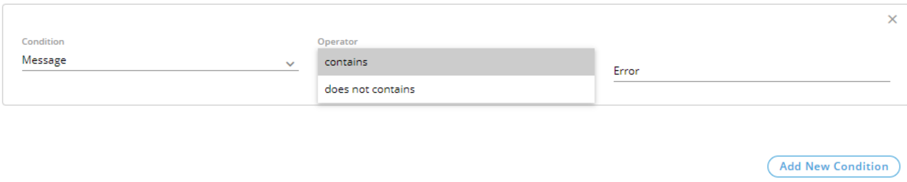


Figure: Message Condition

Provide a value in the adjoining text field after selecting an operator.

V. **From:** Select it to add a condition based upon "From" field that contains the name of sender. It contains the following operators.

- contains
- does not contain

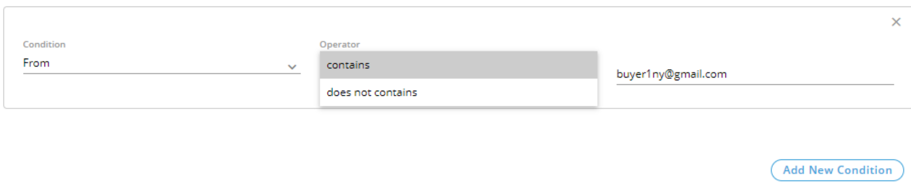


Figure: From Condition

Provide a value in the adjoining text field after selecting an operator.

VI. **CC:** Select it to add a condition based upon "CC" field that contains the name of recipients who are added in CC. It contains the following operators.

- contains
- does not contain

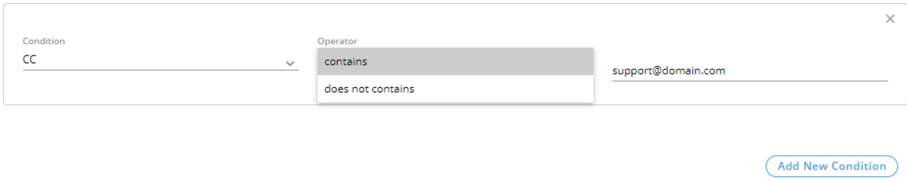


Figure: "CC" Condition

Provide a value in the adjoining text field after selecting an operator.

VII. **Media Profile ID:** Select it to add a condition based upon the ID of the media profile. It contains the following operators.

- contains
- does not contain

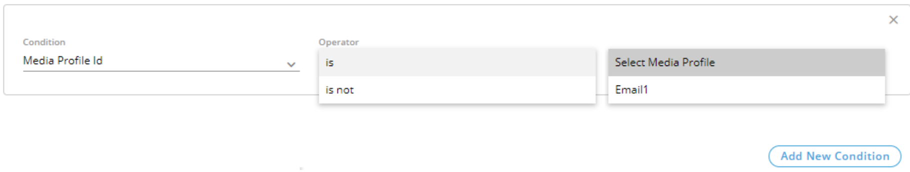


Figure: Media Profile ID Condition

Select a media profile ID after selecting an operator.

C. You can add multiple conditions using the steps discussed above.

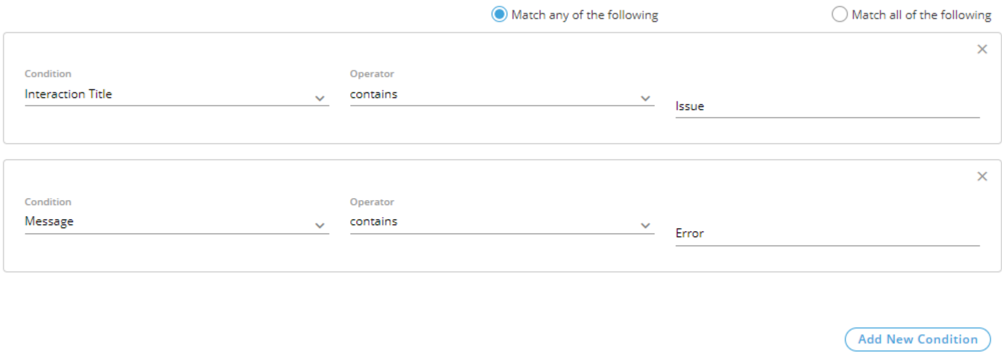


Figure: Multiple Conditions

When multiple conditions are added, the following new options are displayed on the top of "Conditions" Tab.

3.

A.

- **Match any of the following:** Select this option to apply any of the conditions on the messages.
- **Match all of the following:** Select this option to apply both conditions collectively. Either both conditions will be applied or no one will be applied.

You can click "X" icon on the top right corner of an condition to remove it.

4. **<u>Actions</u>:** You can select actions in this section, which will be performed only upon those messages which meet the pre-selected conditions. Perform the following steps.

   A. Click icon to add an action. it shows a section.

   B. You click the drop-down menu to select any of the following actions.

4.

A.

I.

II. **Routing Action:** Select it to perform a routing action. It lets you to assign the ticket matching the conditions to a user in any queue.

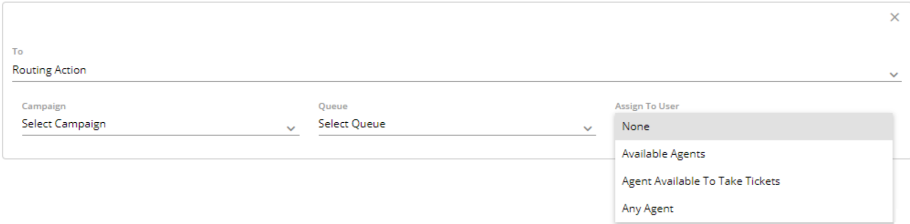


Figure: Routing Action

Perform the following steps.

a. Select the campaign in which you want to apply the action. Its queues get enumerated in "Queue" drop-down menu.

b. Select the queue to which you want to transfer the message that have met the conditions.

c. Now in "Assign to User" drop-down menu, select any of the following options.

- None: Select it to not assign the ticket meeting pre-selected conditions to any agent.
- Available Agents: Select it to assign the ticket meeting pre-selected conditions to any of the available agents.
- Agent Available to take Tickets: Select it to assign the ticket meeting pre-selected conditions to any of those agents who have marked themselves avaialble to take tickets in Interactive Campaign.
- Any Agent: Select it to assignt the ticket meeting pre-selected conditions to any agent whether it is available or not available.

III. **Set Priority:** Select it to set the priority to those messages which have met the pre-selected conditions. Select "Set Priority" in the drop-down menu.

Figure: Priority Action

Select any of the following options.

4.

A.

I.

- Low: Select it to set low priority of messages that meet pre-selected conditions.
- Medium: Select it to set medium priority of messages that meet pre-selected conditions.
- High: Select it to set high priority of messages that meet pre-selected conditions.

II. **HTTP Action:** Select it to apply HTTP Action (also called Webhook) to trigger an external API to process those messages which meet the pre-selected conditions. Please refer to "HTTP Action" Page to know more about the same.

You can follow the same steps to add different kinds of multiple actions. They will run in First In First Out order from top. In other words, the very first action from top will be executed first and the other actions will be executed sequentially.

5. Following screenshot contains the sample details.

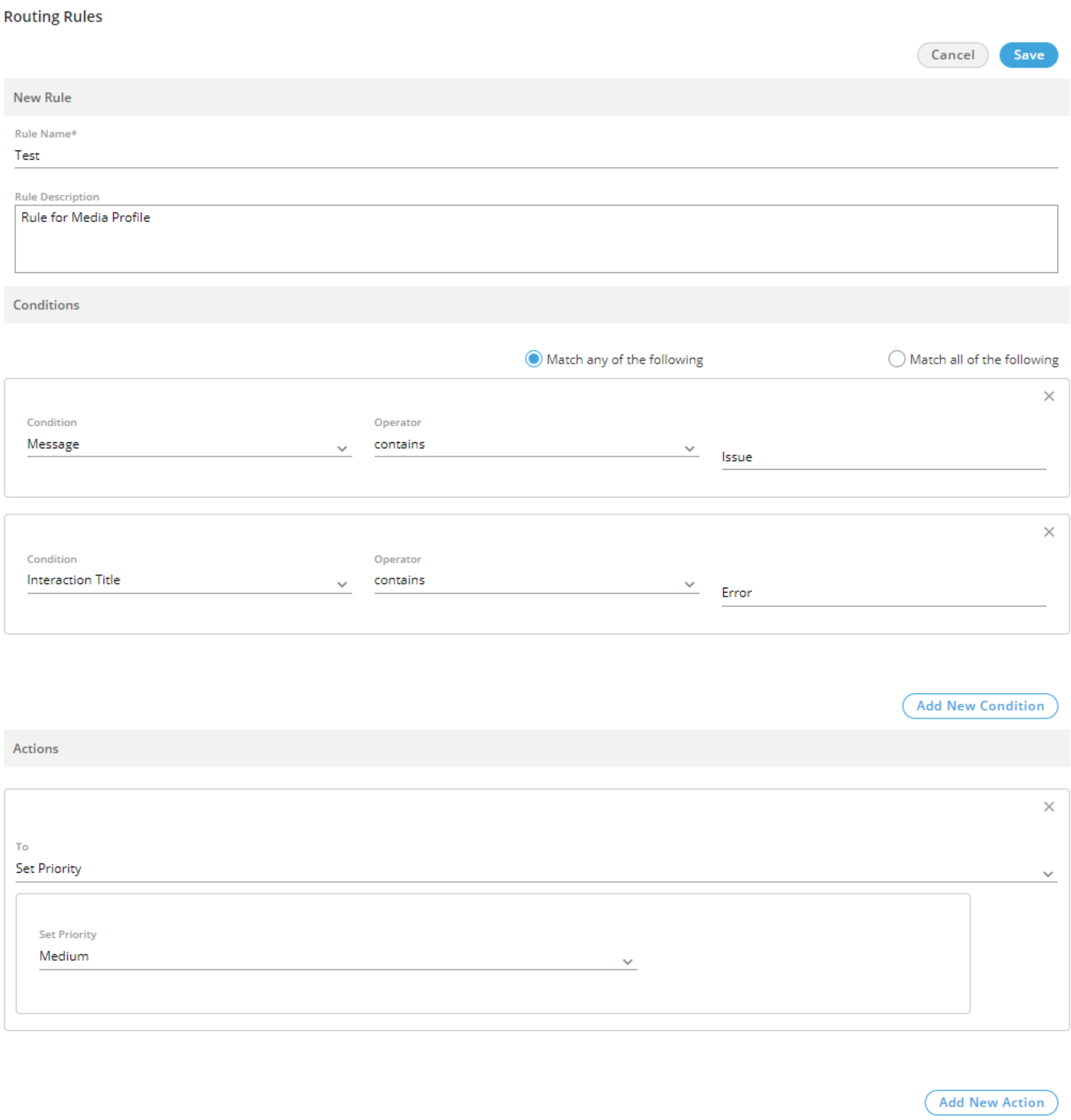


Figure: Adding New Rule

6. Click "Save" to create the rule.

You have to select the rule in the campaign to apply it.

You can create multiple rules using these steps.

Following screenshot shows the multiple rules.

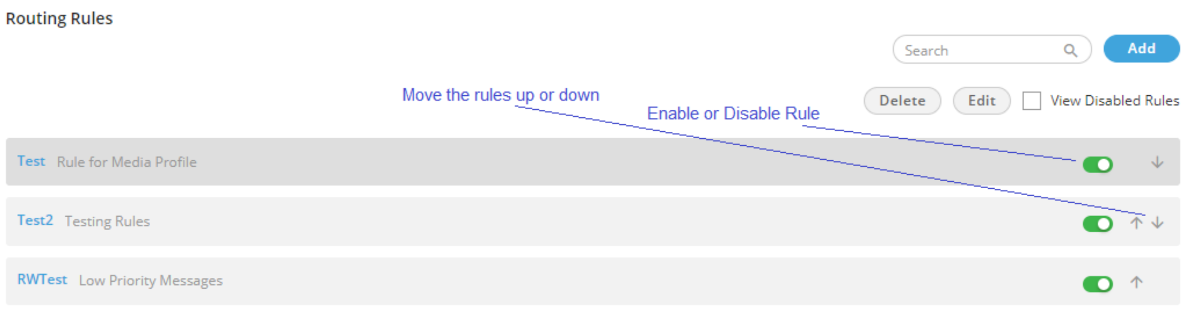


Figure: List of Rules

8.5.1.2 Rule Execution Sequence

The rules will be executed in First In First Out order from top. The very first rule on top will be executed first and other rules will be executed in the sequential order (one-by-one) from top.

You can use the arrow icons on the right corner of every rule to move it up to increase its priority and move it down to decrease its priority.

8.5.1.3 Enable or Disable the Rule

You can disable the rules. The disabled rules will be hidden, but you can make them visible. You can also enable the disabled rules.

8.5.1.3.1 Disable a Rule

Select a rule and click the toggle switch to disable rule. It shows the following message.

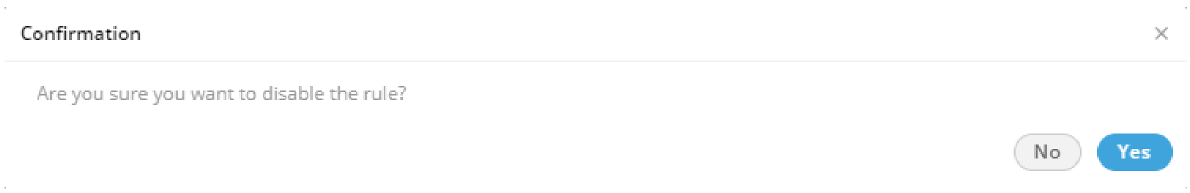


Figure: Asking to disable the rule

Click "Yes" to disable the selected rule. The disabled rule will not be applied and will be hidden in the list.

8.5.1.3.2 View Disabled Rules

Click to check "View Dsiabled Rules" checkbox to show the disabled rules.

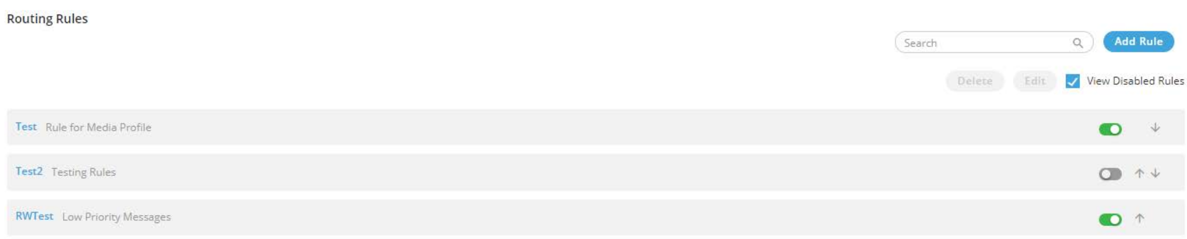


Figure: Displaying the Disabled Rule

8.5.1.3.3 Enable a Disabled Rule

To enable a disabled rule, click the gray toggle switch to enable it. The following message is displayed.

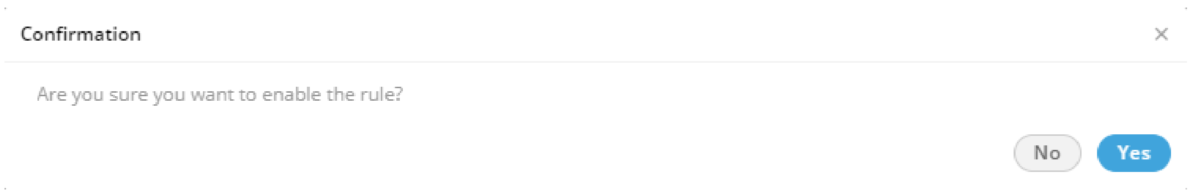


Figure: Asking to enable the rule

Click "Yes" to enable the selected rule. The enabled rule will be applied in the campaign, where it has been selected.

8.5.1.4 Edit a Rule

Perform the following steps to edit a rule.

1. Select a rule and click "Edit" button. It shows the following page.

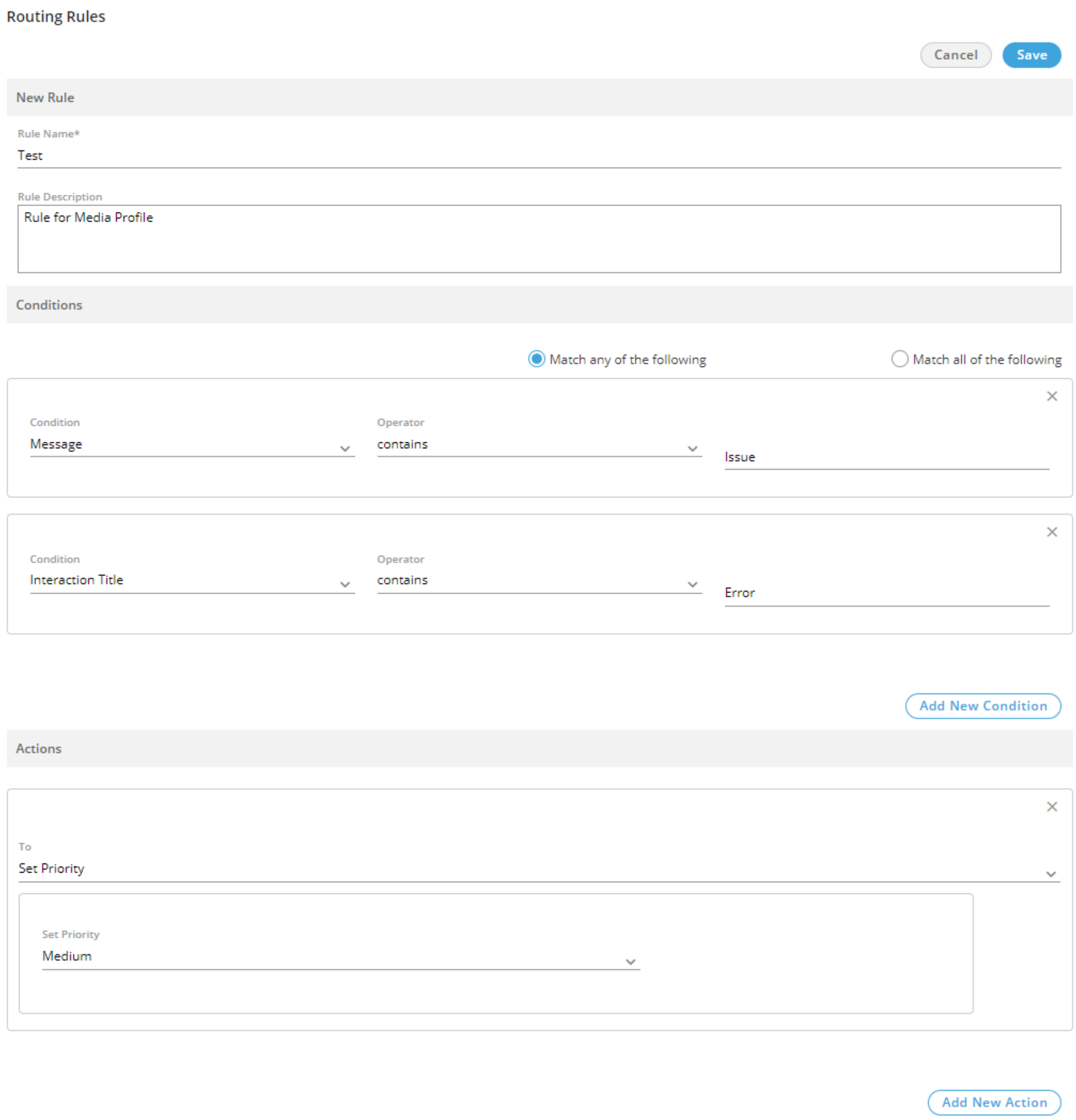


Figure: Edit a Rule

2. Make the required changes and click "Save". Rather, you can click "Cancel" to not edit the rule.

8.5.1.5 Delete a Rule

The Deleted Rule cannot be retrieved back. Also, it will not be applied in the campaign where it has been selected.

1. Select a rule and click "Delete" button. It shows the following message.

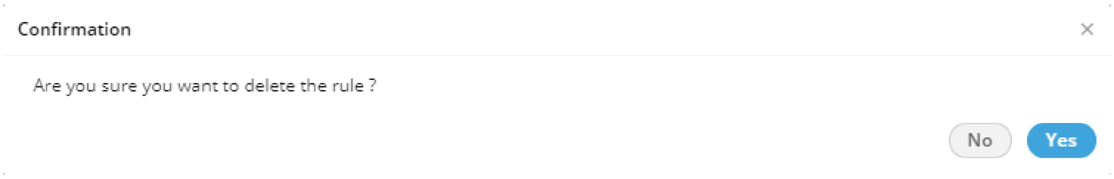


Figure: Warning before deleting a Rule

2. Click "Yes" to delete the rule.

8.5.2 HTTP Action

You can select "HTTP Action" as an action while creating a rule for Media Profile in "Rule" tab of "System Configuration". HTTP Action also called Webhook triggers an external API to process those messages which meet the pre-selected conditions. Before going ahead to use this options, you should know about the common definitions, data that can be accessed, API response data, and variables. After introduction to these fields, the steps to apply HTTP Action will be discussed.

8.5.2.1 Common Definitions

Following common attributes are used in all methods of HTTP Action in "Rules" tab.

- **URL:** Provide the URL of the API that has to be triggered.
- **Body:** It is of the following two types.
  - Form-Data: Enter the body content of API in key and value format. Both have to be provided separately. You have to provide a key and then its value.
  - Raw: Enter the body content in the raw (that is general code) format.
- **Header:** Provide the header of the API.
- **Pre-Request Script:** It should contain JavaScript Code that is executed before the API Request. It is used to create the variables that can be used in URL, Header, and Parameters.

- **Post-Request Script:** It should contain JavaScript code that is executed after the API Request. It is used to create the variables and consume the API response, which will trigger through the action.

8.5.2.2 Data that can be accessed in HTTP Action Scripts

As of now, only data related to "Tickets" can be accessed through the scripts provided in the HTTP Action. Please refer to the following table to know the data that can be accessed and the requied function to access it.

Table: Ticket Data and its Calling Methods

Data	Calling Methods for Script
ticket id	ticket.getTicketId()
hasUnreadMessage	ticket.getHasUnreadMessage()
process id	ticket.getProcessId()
contact center id	ticket.getContactCenterId()
campaign id	ticket.getCampaignId()
queue id	ticket.getQueueId()
assigned user id	ticket.getAssignedUserId()
attached customer id	ticket.getCustomerId()
ticket source type	ticket.getSourceType()
ticket source sub type	ticket.getSourceSubType()

Data	Calling Methods for Script
escalation	ticket.getIsEscalated()
date created	ticket.getDateAdded()
last modified date	ticket.getDateModified()
list of merged ticket ids	ticket.getMergedTicketList()
reopen count	ticket.getReopenCount()
ticket subject	ticket.getSubject()
ticket priority	ticket.getPriority()
external state	ticket.getExternalState()
first response date	ticket.getFirstResponseDate()
first resolve date	ticket.getResolveDate()
first assigned date	ticket.getFirstAssignedDate()
ticket custom field data	ticket.getCustomFields() Example :- ticket.getCustomFields().get("d814-59414465-cf-3"); this would give the value of the custom field of with the ID d814-59414465-cf-3 for the current ticket.

Data	Calling Methods for Script
count of outgoing messages	ticket.getOutgoingMessageCount()
count of incoming messages	ticket.getIncomingMessageCount()
count of outgoing calls	ticket.getOutgoingCallCount()
count of incoming calls	ticket.getIncomingCallCount()
if ticket has failure messages	ticket.hasFailureMessage()
heat value	ticket.getHeatValue()
count of outgoing chats	ticket.getOutgoingChatCount()
count of incoming chats	ticket.getIncomingChatCount()
last reopen date	ticket.getLastReopenDate()
last unassigned ate	ticket.getLastUnassignedDate()
ticket customer information	ticket.getCustomerInfo() Example :- ticket.getCustomerInfo().get("name"); this would give the value of the name field of the customer attached to ticket, where name is a table definition column

Data	Calling Methods for Script
if first assign SLA is achieved	ticket.getFirstAssignedSlaAchieved()
if first response sla is achieved	ticket.getFirstResponseSlaAchieved()
if resolve sla is achieved	ticket.getResolveSlaAchieved()
time remaining for first assign sla	ticket.getTimeRemainingToAchieveFirstAssignSlaInSeconds()
time remaining for first response sla	ticket.getTimeRemainingToAchieveFirstResponseSlaInSeconds()
time remaining for resolve sla	ticket.getTimeRemainingToAchieveResolveSlaInSeconds()
if ticket is assigned or not	ticket.getHasTicketAssigned()
if a response is made on ticket or not	ticket.getHasTicketResponded()
if ticket has been resolved or not	ticket.getHasTicketResolved()
source of the ticket	ticket.getSource();
Initial target of the ticket (same as target of message from which ticket was made)	ticket.getInitialTarget();

8.5.2.3 API Response Data that can be accessed in Post Request Script

Following API Response Data can be in the Post Request Script.

Data	Method to access the Data
Response Code Received	responseCode
Response String Received	responseString

8.5.2.4 Initialization and Accessing Variable in Scripts

Initialize a Variable

Use the following code to initialize a variable in the script.

```
variables.put("<variable_name>","<variable_value>");
```

Following is an example.

```
variables.put("$agent","mary");
```

Access a Variable in Script

Use the following code to access a variable in the script.

```
variables.get("<variable_name>");
```

Following is an example.

```
variables.get("$agent");
```

- Variables that are to be used for replacement in url, headers and parameters must start with initial $. Else replacement would not work.
- Once a variable is initialized, that variable can accessed throughout the execution of the rule. That is once a variable is initialized in an HTTP ACTION, it can be accessed in another HTTP ACTION configured after it.
- If a variable with same name is initialized when a variable with same name exists, the value of the variable is replaced.

8.5.2.5 Steps to apply HTTP Action

Select "HTTP Action" in the top drop-down menu of "Actions" section.

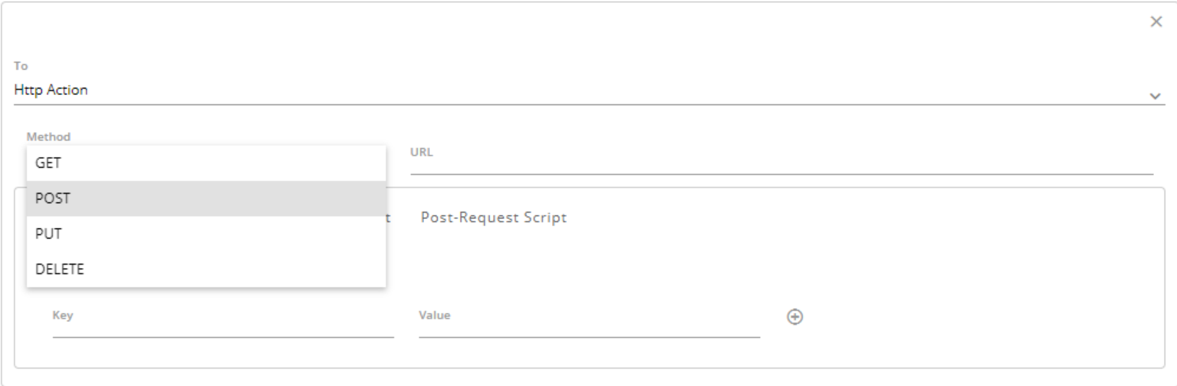


Figure: HTTP Action

Now, perform the following steps.

1.

2. **<u>GET</u>:** Select it to retrieve the information that is identified by the API. After selecting, the interface shows the following elements.

   A. **URL:** Provide the URL of external API.

   B. **Headers:** Provide the key and its value. You can provide mutliple keys here.

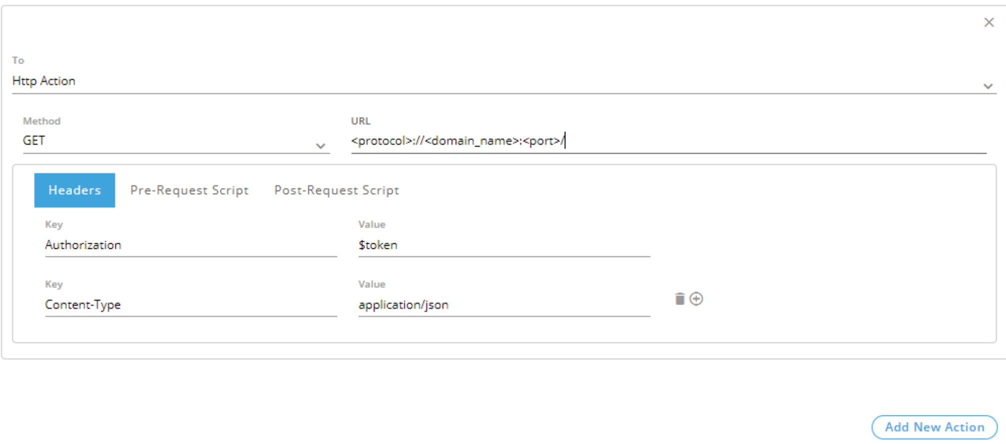


Figure: GET Method of HTTP Action

   C. **Pre-Request Script:** Provide the JavaScript code that will run before the execution of API.

D. **Post-Request Script:** Provide the JavaScript code that will run after the execution of API.

3. **POST:** Select it to send data to the server that is provided by the API. After selecting, the interface shows the following elements.

Here, the sample code for an API will be provided in the examples of the elements.

A. **URL:** Provide the URL of external API. Following is a sample URL.

<protocol>://<domain_name>:<port>/ameyorestapi/tickets/$ticketId/notes

Replace "protocol" with http or https, "domain_name" with the domain name or IP Address of the location where Ameyo Server is installed, and "port" with the port number such as 8888 for HTTP and 8443 for HTTPS.

B. **Headers:** Provide the key and its value. You can provide mutliple keys here.

For an example, we are providing following headers in key and value format.

Authorization : $token

Content-Type : application/json

C. **Body:** Provide the code to initialize and and access the variable.

In this example, we are providing the code in raw format in "Body" to initialize the variable from response.

```
 var response=responseString;
eval(\"response = \" +response + \";\");
variables.put("$noteId",response.noteId);
```

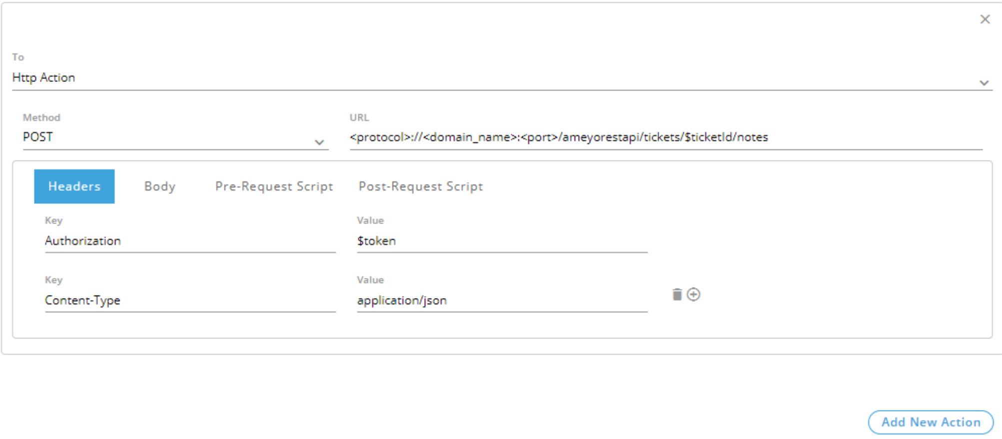


Figure: POST Method of HTTP Action

D. **Pre-Request Script:** Provide the JavaScript code that will run before the execution of API.

Following is a sample code.

```
variables.put("$token","fecace70bff6ea0c");   // this is the same token we configured in database
variables.put("$ticketId",ticket.getTicketId());
variables.put("$ticketId",ticket.getAssignedUserId());
var subject= ' note for testing http action for '+ ticket.getTicketId();
variables.put("$subjectForNote",subject);
```

Here, the API token has to be provided in the database so that the system can authenticate it.

E. **Post-Request Script:** Provide the JavaScript code that will run after the execution of API.

Following is an already known API Response of a sample POST Method.

```
{
"noteId": "d414-5a6c16fc-MessageId-2",
```

```
"subject": "regarding ticket resolution",
"description": "this is test description",
"messageType": "EXTERNAL_NOTE",
"userId": "mary",
"dateModified": 1517034536012,
"dateAdded": 1517034536012
}
```

4. **PUT:** Select it to create or replace any resource that is provided by the API. After selecting, the interface shows the following elements.
   A. **URL:** Provide the URL of external API.
   B. **Body:** Provide the code to initialize and and access the variable.
   C. **Headers:** Provide the key and its value. You can provide mutliple keys here.

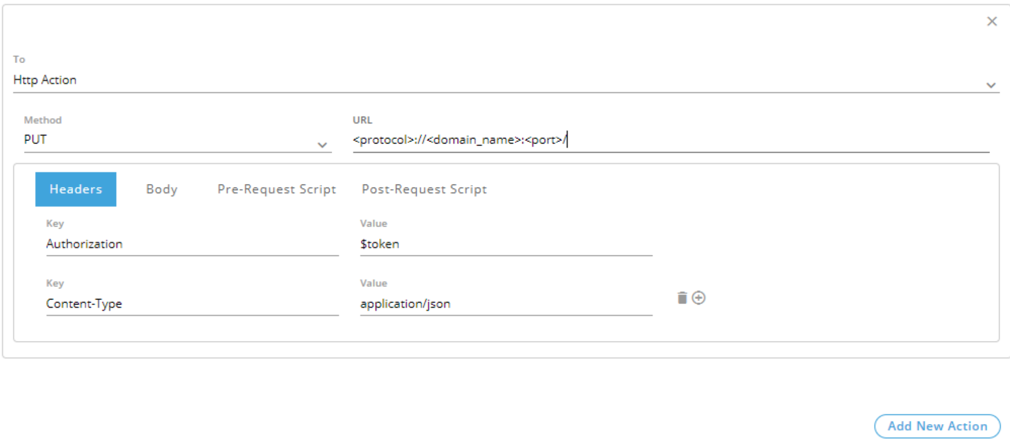


Figure: PUT Method of HTTP Action

   D. **Pre-Request Script:** Provide the JavaScript code that will run before the execution of API.
   E. **Post-Request Script:** Provide the JavaScript code that will run after the execution of API.
5. **DELETE:** Select it to delete any resource that is requested by the API. After selecting, the interface shows the following elements.

A. **URL:** Provide the URL of external API.

B. **Body:** Provide the code to initialize and and access the variable.

C. **Headers:** Provide the key and its value. You can provide mutliple keys here.

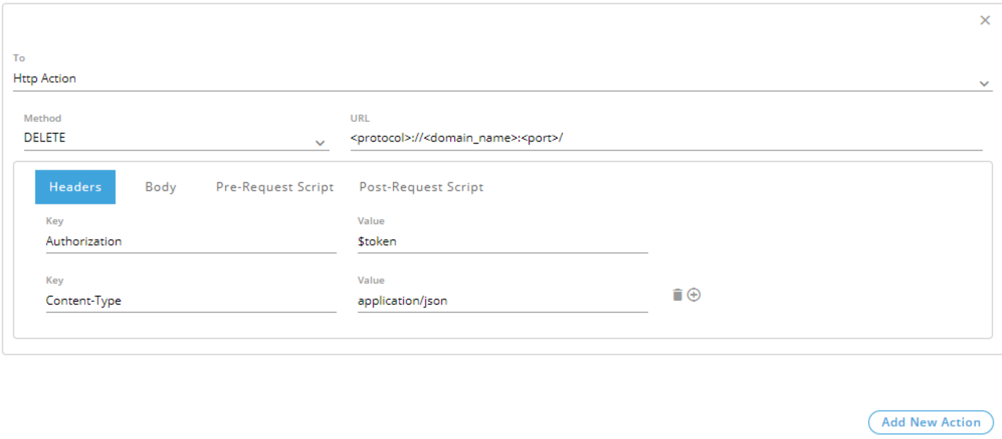


Figure: DELETE Method of HTTP Action

D. **Pre-Request Script:** Provide the JavaScript code that will run before the execution of API.

E. **Post-Request Script:** Provide the JavaScript code that will run after the execution of API.

After selecting a method, you have to provide the inputs.

You can follow the same steps to add more HTTP Actions. With HTTP Actions, you can add "Set Priority" and "Routing" actions also. Refer to "Steps to Add Actions" to know how to add these actions.

8.6 Routing Configuration

Here, Administrator can configure incoming call routing policies and profiles based on incoming channel, DID or source phone. This Tab contains the following policies and their types.

1. **DefaultCallContextProfile:** We can define the call contexts (like Zap trunks, SIP minutes) and route the calls through these contexts to a particular node flow in a campaign. Here we need not to identify the Source / Destination number.
2. **DefaultSourcePhoneProfile:** This profile is used to identify a particular source phone and route the calls coming from that number to a particular node flow in campaign. Let's suppose if we want to do routing based on the phone number of caller. We will select the"DefaultSource Phone Profile" from Profiles tab and define the profile plans
3. **DefaultDestinationPhoneProfile:** This policy is used to route the calls landing on a particular DID number. These calls can be routed to a particular node flow in a campaign. Let's suppose if we want to do routing for a particular DID number or toll free number. We will select the"DefaultDestinationPhoneProfile" and define the profile plans.

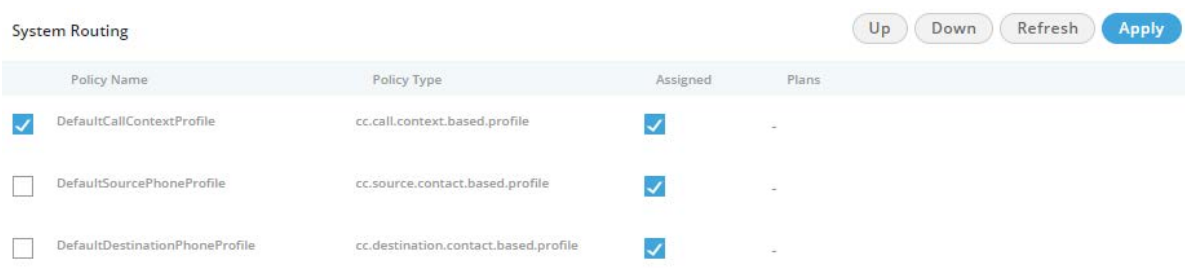


Figure: Routing Tab

Policies can be assigned by checking the **"Assigned"** checkbox. Uncheck this box to unassign the policy.

Order of policies can be moved from the "Up" and "Down" button. Policy will be followed in the sequential order from top to bottom.

Click "Apply" button to save the made changes. Rather, you can click "Cancel" button to discard the changes.

8.6.1 Create Plan for a Policy

The Administrator can define the routing plan for the policies. Perform the following steps.

1. Check the box to select a policy.

2. Click "-" under "Plans" header adjacent to a policy for creating a new plan. The following pop-up is displayed on the screen.

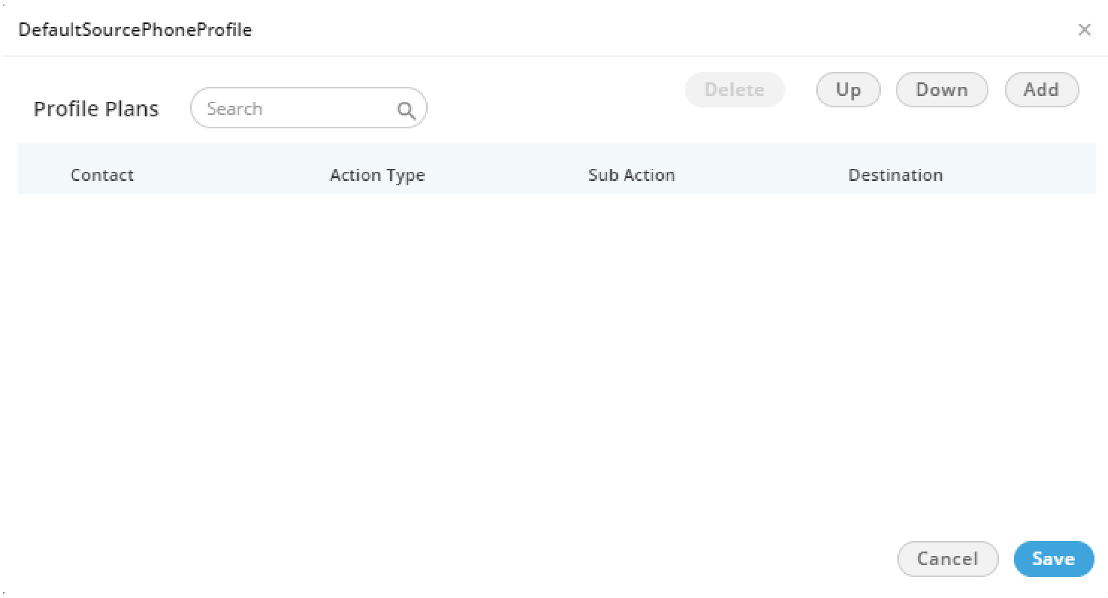


Figure: Blank Plan for DefaultSourcePhoneProfile

3. Click "Add" button to add a row in the text area.

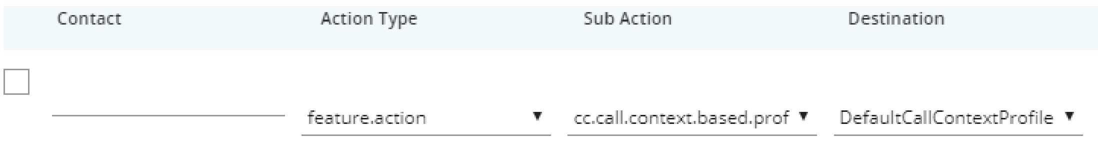


Figure: Blank Raw for DefaultSourcePhoneProfile and DefaultDestinationPhone Profile

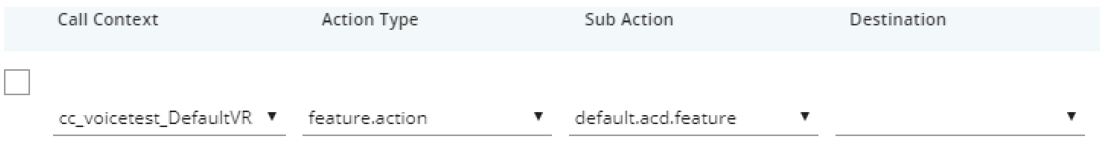


Figure: Blank Raw for CallContextProfile and DefaultDestinationPhone Profile

4. **Call Context:** This field comes for CallContextProfile Plan only. You have to select any of the following options.

    A. audiocodes

    B. cc_voicetest_DefaultVR

C. softphone1

D. voip

OR

Contact: This field comes for both DefaultSourcePhoneProfile Plan and DefaultDestinationPhoneProfile Plan. You have to provide the contact number here.

5. **ActionType:** It has two options.
   A. **Feature.action:** Select it to route the call to nodeflow. When selected, Sub-Action drop-down shows the following options.
      I. default.acd.feature
      II. did.based.phone.feature
      III. manual.dial.feature
   B. **Profile.action:** Select it to route the call to another profile plan. When selected, Sub-Action drop-down shows the following options.
      I. cc.call.context.based.profile: Select it to transfer the call to the Call Context based Profiles. When selected, the available Call Context Profiles will be listed in the Destination drop-down menu.
      II. cc.destination.contact.based.profile: Select it to transfer the call to the Destination Contact based Profiles. When selected, the available Destination Contact Profiles will be listed in the Destination drop-down menu.
      III. cc.source.contact.based.profile: Select it to transfer the call to the Source Contact based Profiles. When selected, the available Source Contact Profiles will be listed in the Destination drop-down menu.
6. **Destination:** If "feature.action" is selected in Action Type, then you have to select the available destination numbers in this drop-down menu. If "profile.action" is selected, you can select the relevant profile policy such as "DefaultCallContextProfile" for "cc.call.context.based.profile" sub-action,

"DefaultDestinationPhoneProfile" for "cc.destination.contact.based.profile", and "DefaultSourcePhoneProfile" for "cc.source.contact.based.profile".

7. You can add multiple rows in a plan of DefaultSourcePhoneProfile.

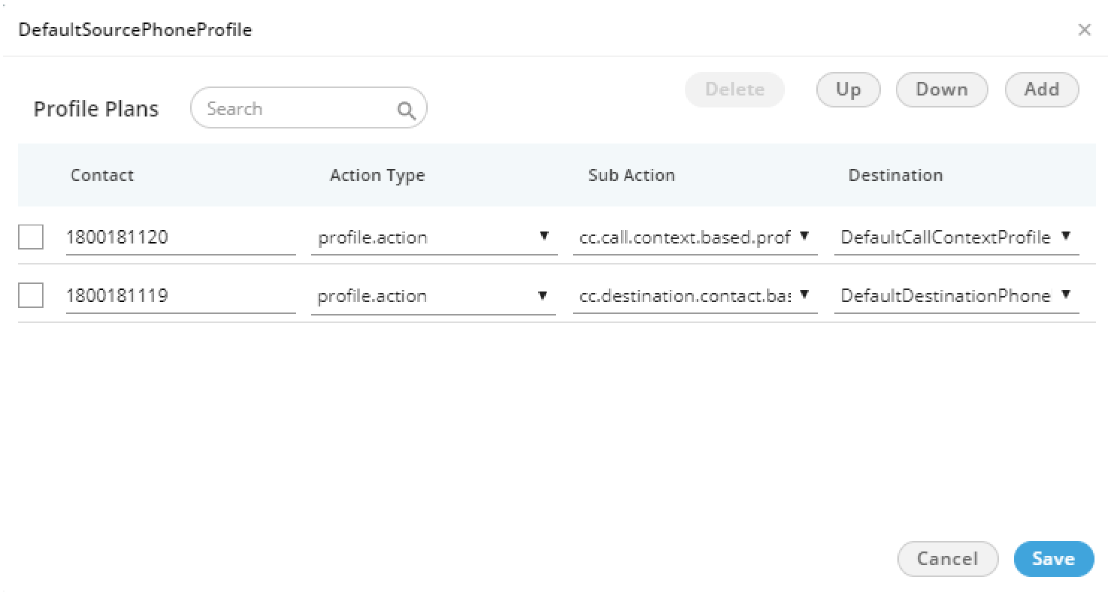


Figure: Adding Plan for DefaultSourcePhoneProfile

8. To delete the created **"Profile Plan"**, select that particular profile plan and click on **"Delete"** button.
9. Any incoming call will be routed depending on the sequence of profiles defined. Profile moved at the top level will be followed first and then next defined profile will be followed.
10. Click **"Up"** to move the row to up and click **"Down"** to move the row to down.
11. Click **"Save"** to save the changes. Rather, you can click "Cancel" to discard the changes.

You can add and modify the plan for all policies.

8.7 Dispositions

It contains two sub-tabs - Disposition Class and Disposition Plan.

8.7.1 Disposition Class

This tab is used to define disposition codes and classes for the calls. Disposition class is a set or logical grouping of disposition codes. Disposition code is the reason of call disconnection which agent selects while disposing any call.

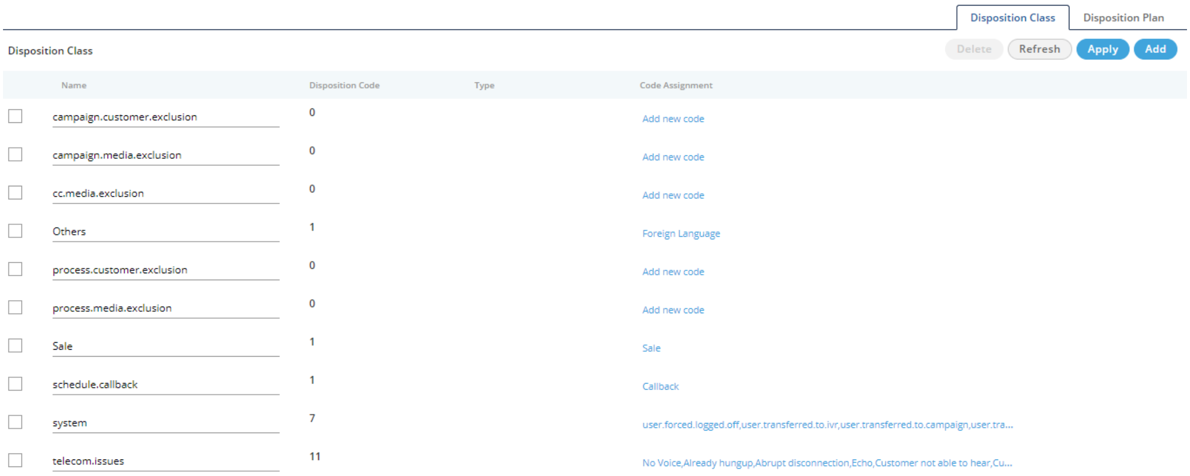


Figure: Disposition Class

Administrator can perform the following steps here.

1. The Administrator can add "Disposition Class" by clicking "Add" button. "User Defined" type will appear for the Administrator created disposition classes.
2. The Administrator can also add "Disposition Code" by clicking "Add New Code" option for a disposition class.

8.7.2 Disposition Plan

This tab is used to create disposition plan and assign the disposition codes in that plan. From here, administrator can select the disposition codes which needs to be assigned in created disposition plan.

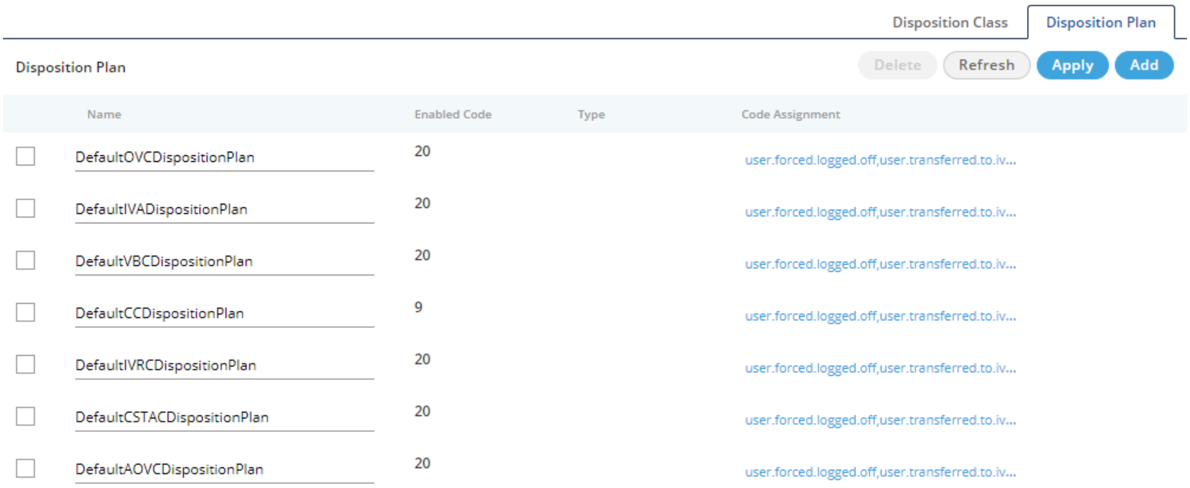


Figure: Disposition Plans

Perform the following steps.

1. To add a new Disposition Plan, click "Add" and provide a name in the text field and click "Add New Code" to add the code.

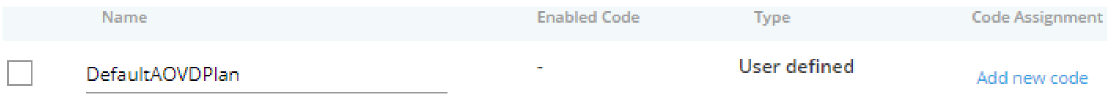


Figure: Adding New Disposition Plan

"User Defined" will be the type for custom disposition plans added by the Administrator.

2. To change the code for an existing disposition plan, select it and click "Code Assignment option". It shows the following box for both adding and modifying the code assignments.

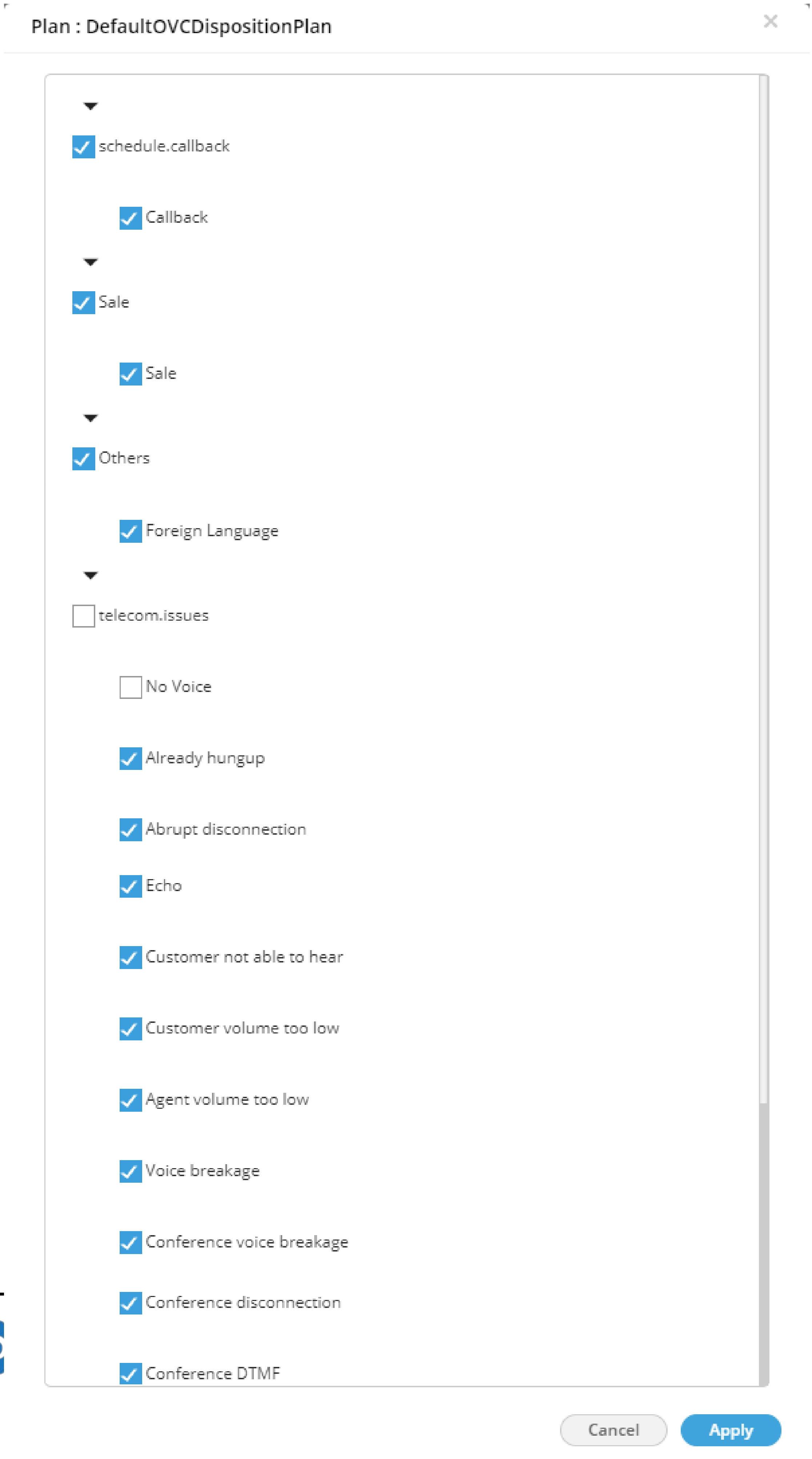

Plan : DefaultOVCDispositionPlan
schedule.callback
Callback
Sale
Sale
Others
Foreign Language
telecom.issues
No Voice
Already hungup
Abrupt disconnection
Echo
Customer not able to hear
Customer volume too low
Agent volume too low
Voice breakage
Conference voice breakage
Conference disconnection
Conference DTMF
Cancel
Apply

Figure: Add or Modify Code Assignments for any Disposition Plan

3. Select the checkboxes of different disposition codes which has to be assigned in that disposition plan. Uncheck those which you do not want to assign in the selected disposition plan.
4. Click **"Apply"** to save the changes. Rather, you can click **"Refresh"** button to discard the changes.
5. Administrator can also delete a particular disposition plan by selecting that plan and click on **"Delete"** button. It shows a warning message before deletion. Click "Yes" to delete the selected disposition plan, whereas you can click "Cancel" to not delete it.

8.8 Skills Tab (Licensed Feature)

Skill-based routing (SBR) is a component of automatic call distributor (ACD) systems that filters and directs incoming inquiries to call center agents with the most applicable skill sets.

Figure: Skills Tab

By closely matching an incoming call to the call center agent best-prepared to address a particular issue, callers experience shorter wait times and faster resolution of their issues, reducing Average Handle Time. Because the agents are trained for more specific skill sets, less training is required.

Furthermore, the most highly-skilled agents can be assigned to important clients, targeting resources where they will provide the most return for the call center. These factors significantly reduce abandon rates and increase agent utilization, productivity and overall call center efficiency.

As per different Queues/DIDs, different skills can be created.

8.8.1 Create a Skill

Administrator may create new Skills by following below steps.

1. Click **"Add"** button. It shows a row in the blank area.

Figure: Adding a New Skill

2. Enter Skill name and define skill levels by clicking **"Add Skill Level"**. It shows the following pop-up.

Figure: Row to Add a Skill Level

Here, click **"Add"** button to add a skill level. Enter the name of skill level and its weightage.

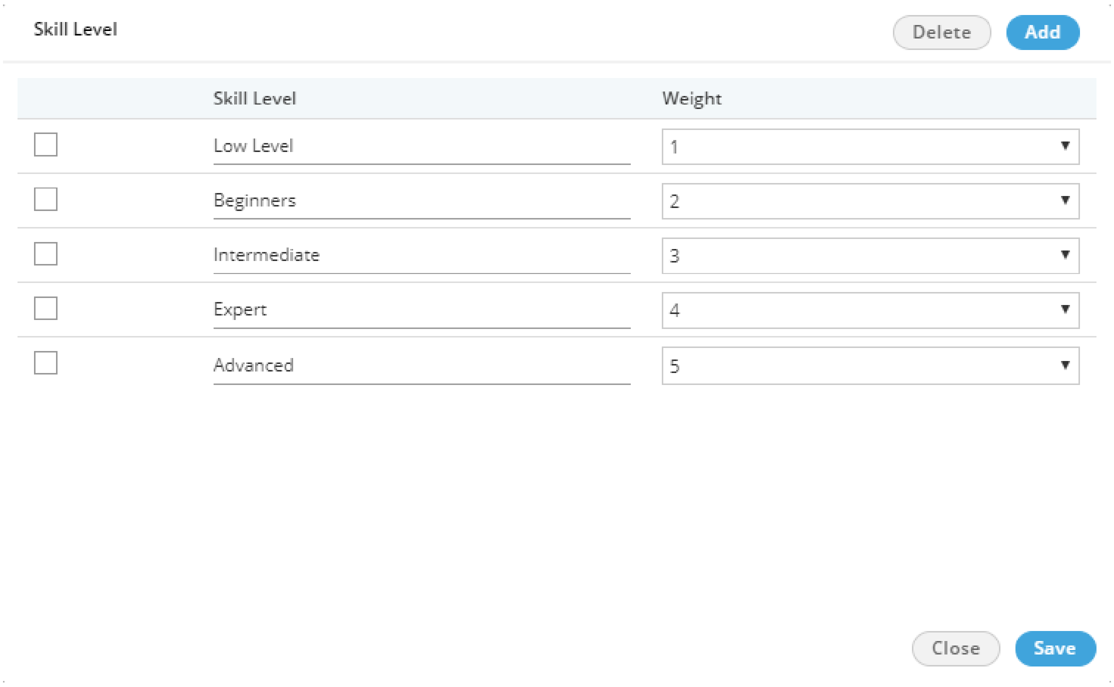


Figure: Adding Skill Levels

You can select a skill level name and click "Delete" it.

After adding the required skill levels, click "Save" to save them. Whereas you can click "Cancel" to discard the changes.

When you click "Save", it takes you back to the main that shows the list of added Skill Levels.

3. Assign the users in the respective skill by clicking **"Manage Users"** button.

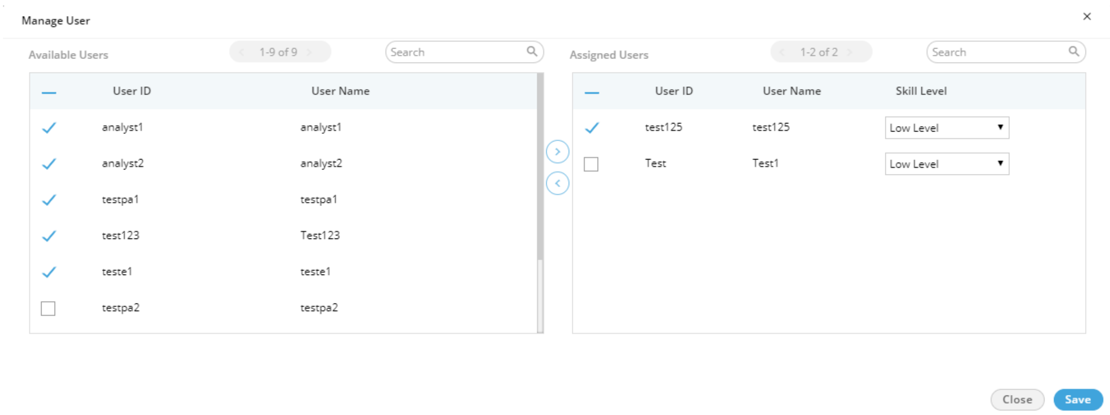


Figure: Manage Users

Perform the following steps here.

A. Select the user from **"Available"** section.

B. Click on ">" symbol to assign the user. If administrator wants to unassign a user from the campaign, then simply select the user and click on "<" symbol to unassign that user.
   Assigned users will be listed in **"Assigned"** section.

C. To unassign users, select the users in "Assigned Users" section and click < icon.

D. Click "Save" button to save the changes.

4. Click "-" icon under "Skill in Queue" header and select the campaign and the queue in which the created skill will be assigned.

5. Click **"Apply"** to apply the changes.
   Rather, you can click "Refresh" to discard the changes.You can add multiple skills here.

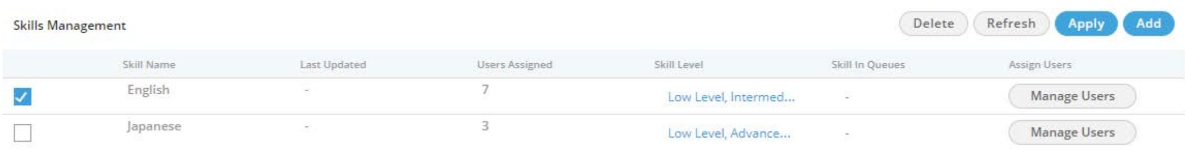


Figure: Added Skills

8.8.2 Delete a Skill

The deleted skill cannot be retrieved. Also, the deleted skill will not be applied in the selected queue and campaign.

To delete a skill, select it and click **"Delete"** button. The warning message is displayed on the screen. Click "Yes" to delete the selected skill. Else, click "No" to not delete the

8.9 Exclusions

If administrator wants to exclude few numbers that should not be dialed in the system, then they can be uploaded in exclusion tab by adding leads.

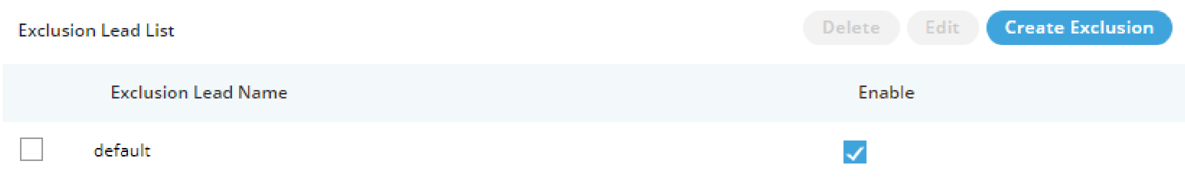


Figure: Exclusions Tab

Administrator can perform the following steps.

1. Click "Create Exclusion" to create a new exclusion lead. It shows the following pop-up.

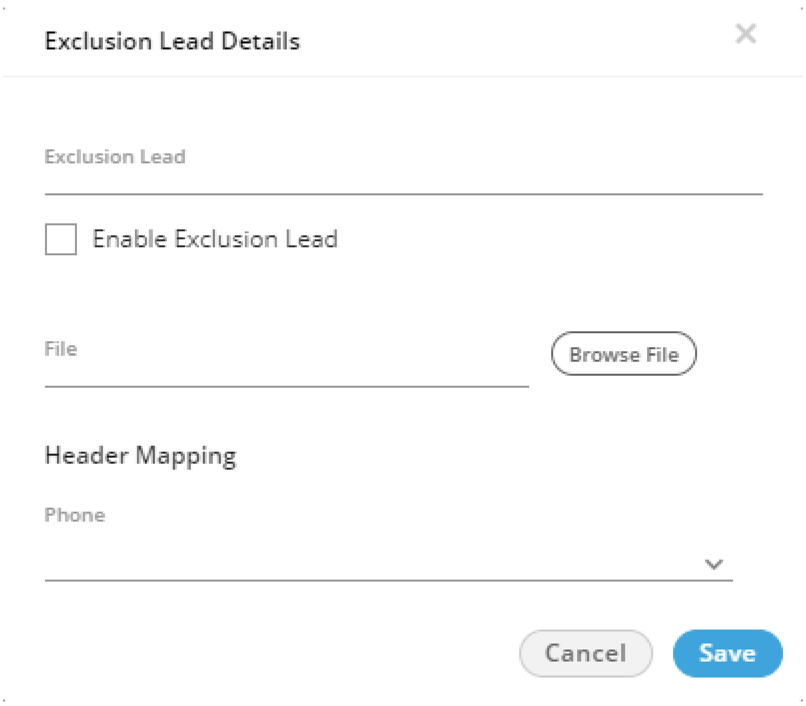


Figure: Exclusion Lead Detail

Here, you have to perform the following steps.

A. In exclusion lead column, enter the name of the lead.

B. Check "Enable Exclusion Lead" box to enable the new lead being created.

C. Click "Browse File" to select the location and the CSV file. Click "Open" button to upload that file.

D. In Header Mapping, Administrator can map the file headers of lead with phone1, phone2, phone3, phone4, phone5, timezone, and name headers.

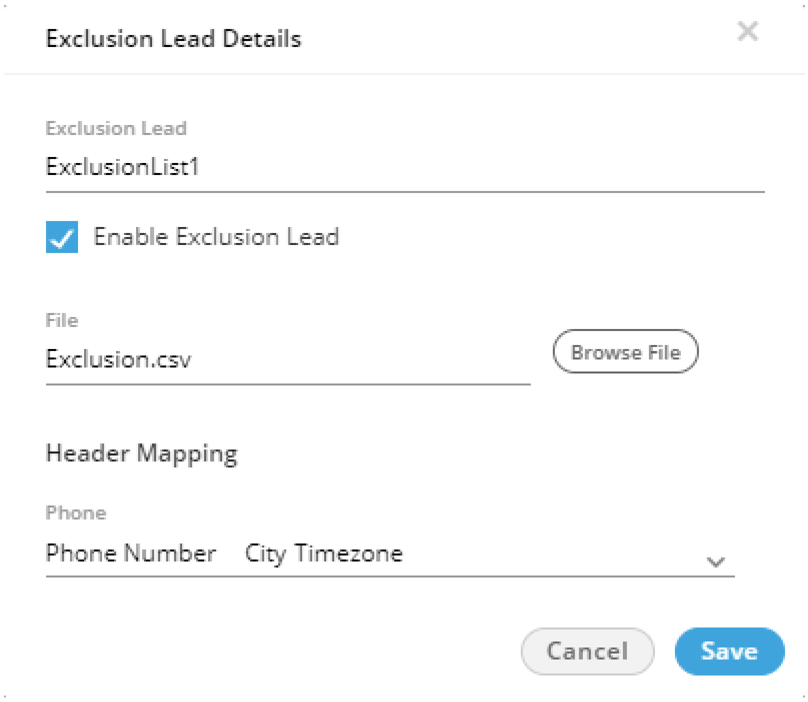


Figure: Sample Exclusion Lead

E. Click "Save" to save the changes.

Rather, you can click "Cancel" to discard the changes.

2. After clicking "Save", it takes you back to the main page that shows the created exclusion list.You can create the multiple exclusion leads here.

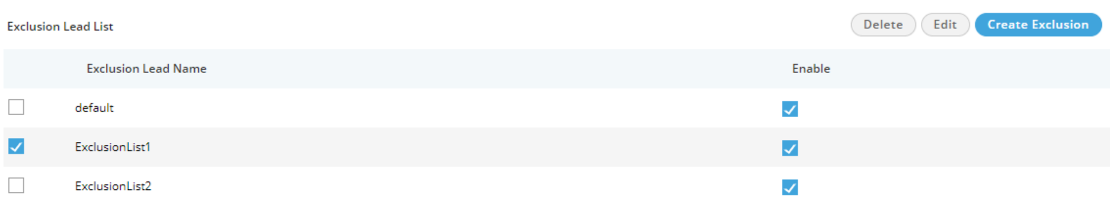


Figure: Exclusion Leads

8.9.1 Disable or Enable an Exclusion Lead List

Uncheck "Enable" box for any lead to disable it. You can check this box again to enable it.

8.9.2 Edit an Exclusion Lead List

Select an Exclusion Lead and click "Edit" to edit it.

8.9.3 Delete an Exclusion Lead List

The delete exclusion lead cannot be retrieved back. Also, it will not be applicable in the selected campaign.

Select an Exclusion Lead and click "Delete" to delete it. A warning message is displayed on screen. Click "Yes" to delete it else you can click "No" to not delete it.

8.10 Voice Mail (Licensed Feature)

Voice Mail is a method of storing voice messages electronically for later retrieval by administrator and supervisor.

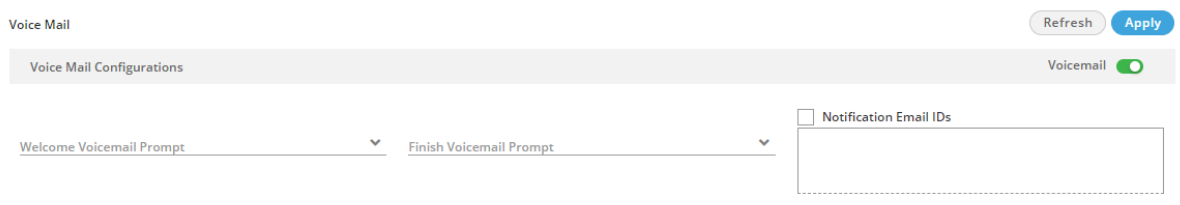


Figure: Voicemail

1. This feature is licensed. This tab will be only visible if voicemail license is procured at the center.
2. The Administrator can enable Voicemail feature at system level if enabled by sliding the **"voicemail"** bar towards right. If this is not enabled, then voicemails will not be recorded.

3. To enable sending the voicemail's notifications, administrator needs to check the "Notification Email IDs" checkbox.
    A. **Notifications Email IDs**: Administrator can enter the multiple email ids (gmail domain only) separated by comma.
    B. **Welcome Voicemail Prompt**: Select the welcome voicemail prompt from the drop down field.
    C. **Finish Voicemail Prompt**: Select the finish voicemail prompt from the drop down field.
4. Click **"Apply"** button to save the changes.
   Rather, you can click **"Refresh"** to discard the changes.

8.11 Holiday/Office Timings (Licensed Feature)

Holiday/Office Timings is a feature which defines the holiday and office hour timings. This feature is licensed. This tab will be only visible if holiday/ office timing license is procured at the center.

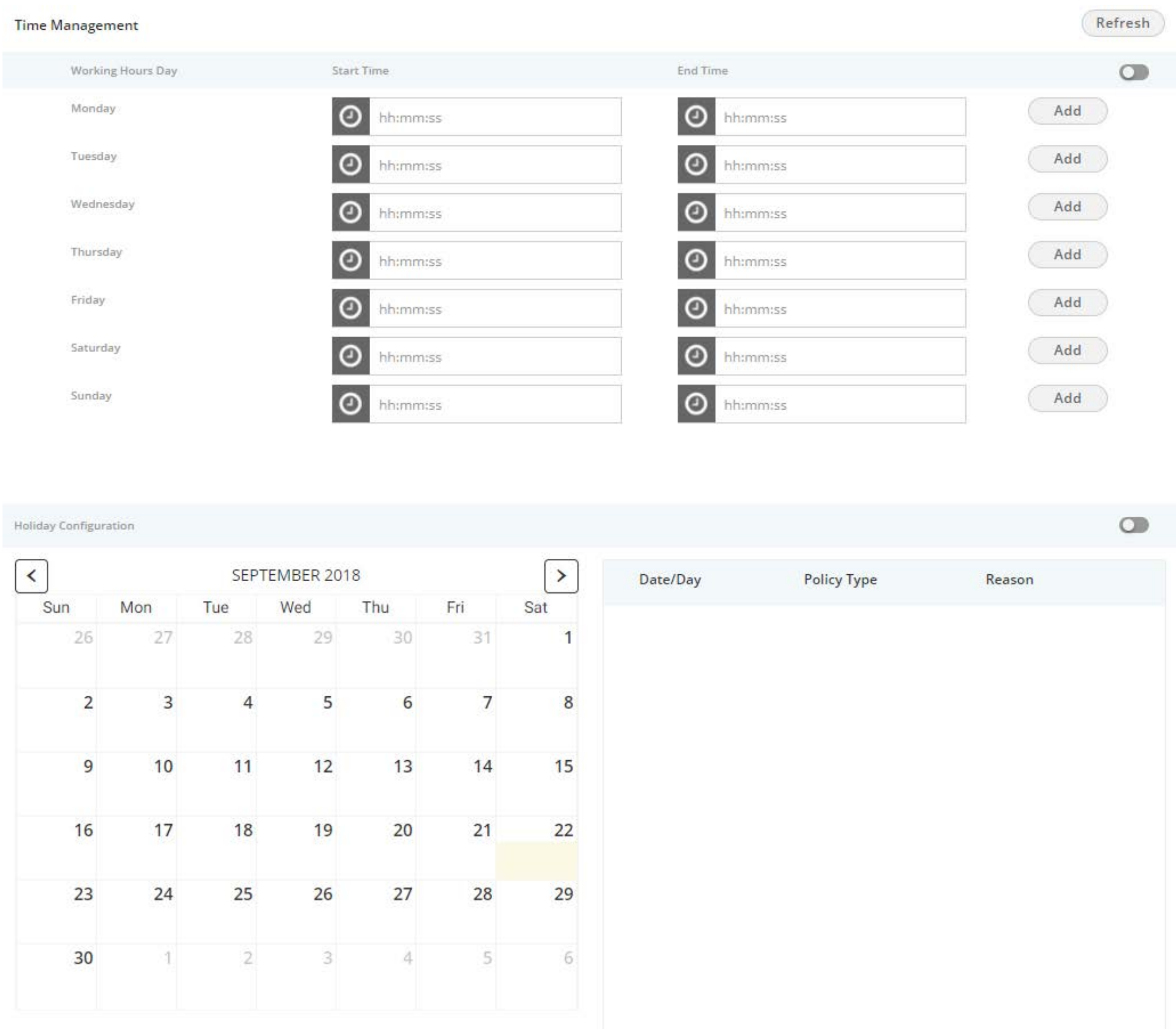


Figure: Holiday/Office Timings Tab

8.12 Working Hour Configuration

Perform the following step to configure the working hours.

1. The Administrator can enable office hour at system level under Time Management by sliding the working hours bar towards right to enable working hours.

   If this is not enabled, then office hour configuration will not be configured.

2. Click the time box under "Start Time" for any day to add the time when the working hours start. It shows a pop-up, in which you can select the hours, minutes, and seconds.

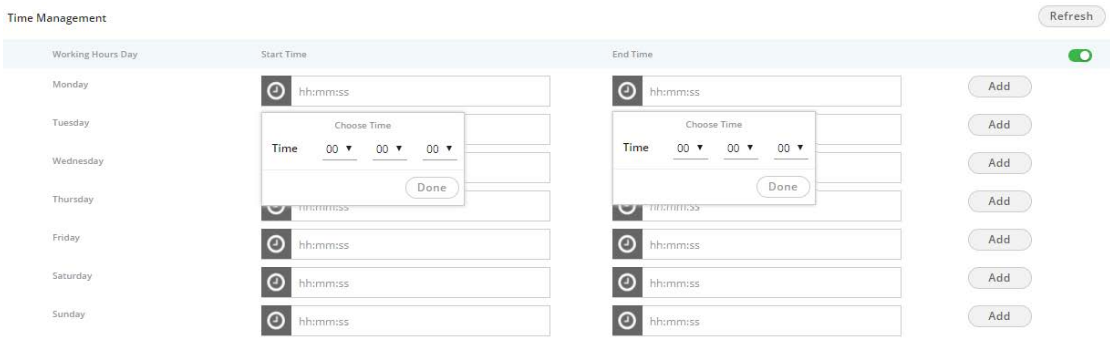


Figure: Define Working Hours

3. Click "Add". You can provide the working hours for all seven days as displayed in the following screenshot.

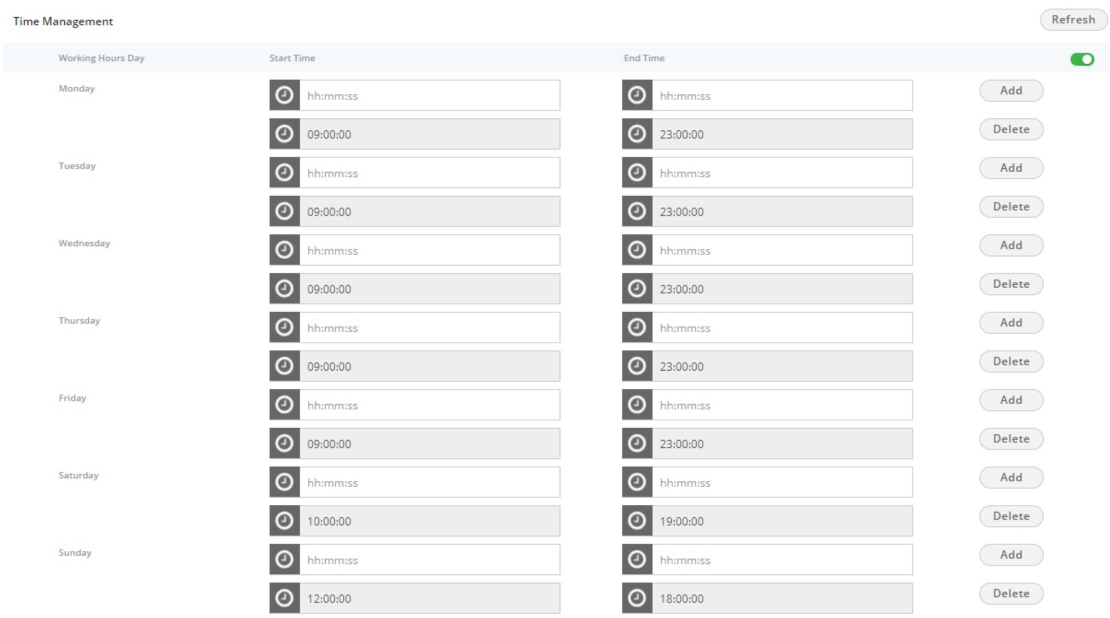


Figure: Defined Working Hours

To delete the working hour for a day, click "Delete" for that row.

8.12.1 Holiday Configuration

The Administrator can enable Holiday at system level under this option by sliding the holiday configuration bar towards right. If this is not enabled, then holiday configuration will not be configured.

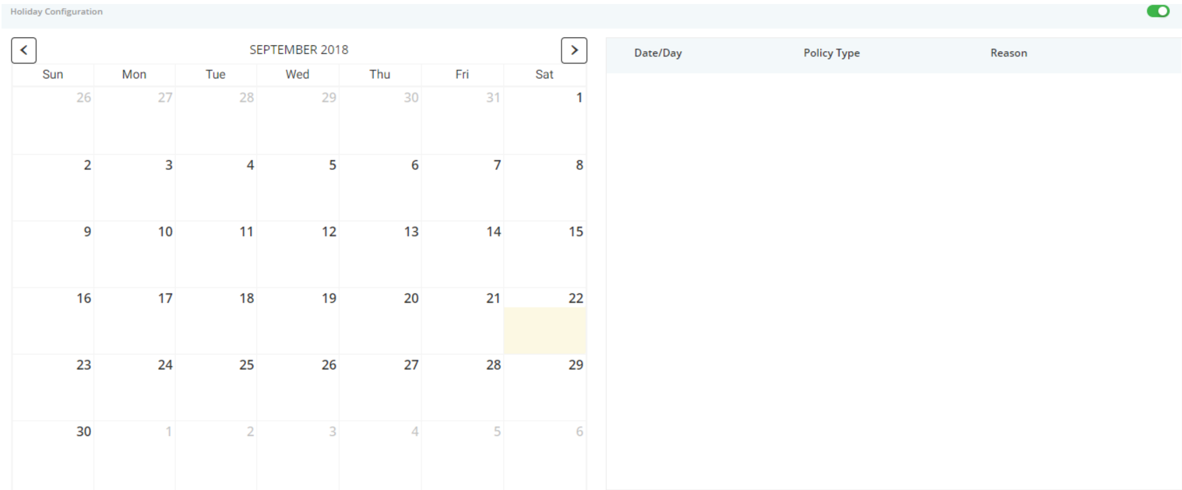


Figure: Holiday Configuration

Perform the following steps.

1. Administrator can select the date from calendar to mark different days as holiday.
2. Click a day to mark that day as Holiday or Working Day using the following pop-up.

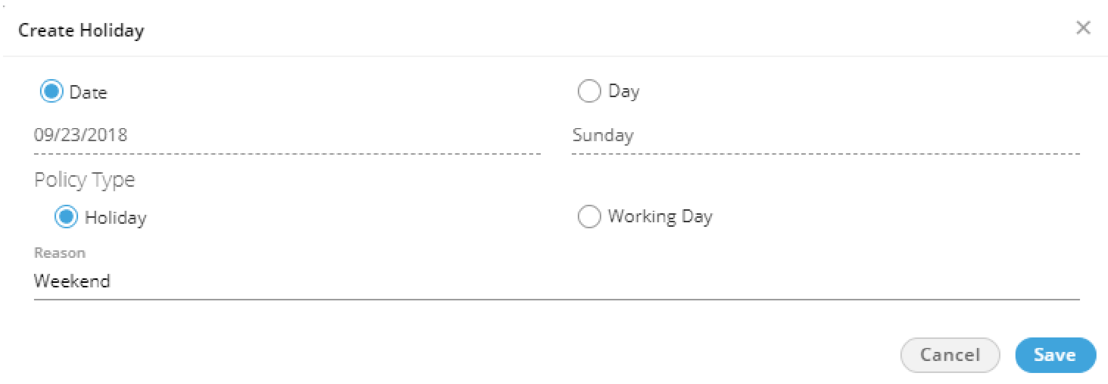


Figure: Create Holiday or Working Day

3. **Date:** Click "Date" if you only want to mark the selected date as Holiday or Working day.

   After selecting it, select any of the following options.

- **Holiday:** Click it to mark the selected day as a holiday.
- **Working Day:** Click it to mark the selected day as a working day.

Click "Save" to mark it as the selected option.

4. **Day:** Click "Day" if you want to want the holiday or working day to repeat on the same day.

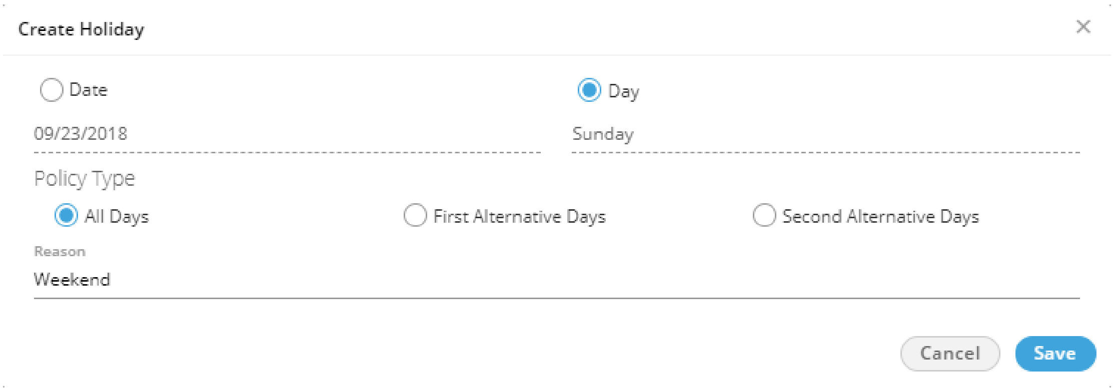


Figure: Create Reoccuring Holidays

After selecting it, select any of the following options.

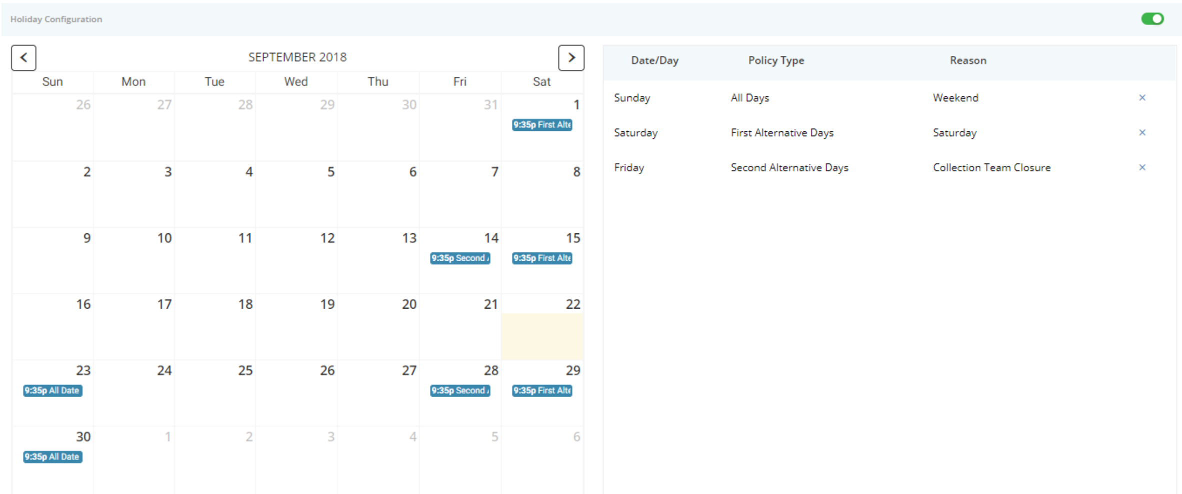
- **All:** Select it to mark all days in the month as the holiday.
- Holiday on an alternate day mean if the holiday is marked on the first week then the next holiday on the same day will be on the third week. There will be no holiday in the second week on the selected day. Here, you can select whether to start alternate holidays on first week or second week.
- **First Alternate Days:** Select it to start the alternate holidays on the selected day from the first week itself.
- **Second Alternate Days:** Select it to start the alternate holidays on the selected day from the second week itself.

5. Provide a reason to create a holiday or weekday.

6. Click "Save" to save the day.

   Rather, you can click "Cancel" to discard it.The selected holiday will be listed in the right side section.

Following is a sample screenshot.



Created the holidays

To delete a holiday, click "X" for a holiday in the right side section.

8.13 Spam Filter Configuration

Spam Filter Configuration allows you to block the auto-creation of tickets for the messages received from specific email addresses, Facebook users, and Twitter users. This filtration is based upon keywords. No ticket will be created for the messages received from those email addresses, Facebok users, and Twitter users which contains any of the specified keywords.

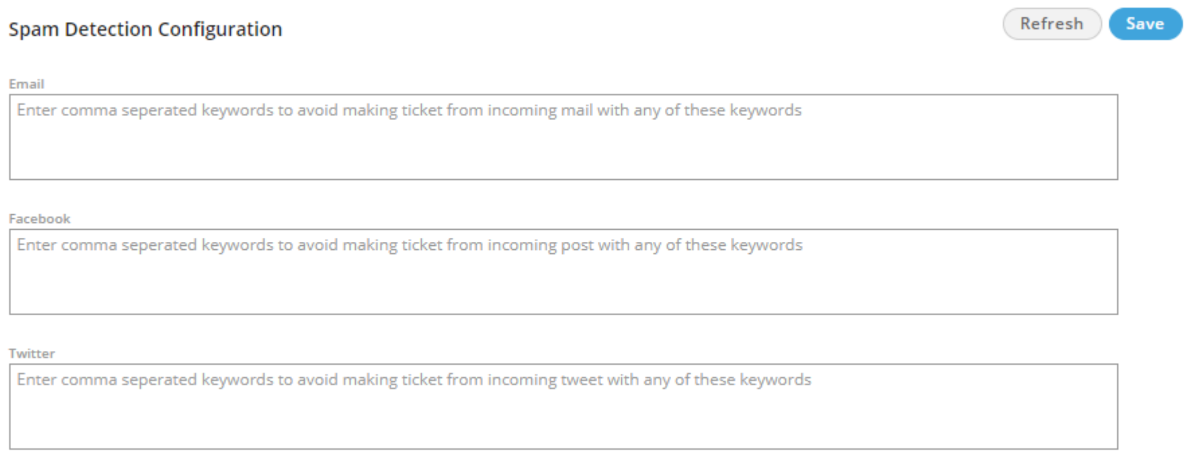


Figure: Spam Filter Tab

You just have to enter the comma separated list of keywords in the provided text boxes and click "Save" button.

Figure: provided the list of spam keywords

8.14 Rule Engine Tab

Instead of uploading the separate leads in separate campaigns, you can upload the leads centrally in Ameyo and use this "Rule Engine" Configuration to automate what leads shold go to which campaign.

Figure: Rule Engine Tab

8.14.1 Create a Rule

Perform the following steps to create a rule.

1. Click "Add" to create a new rule using the following pop-up.

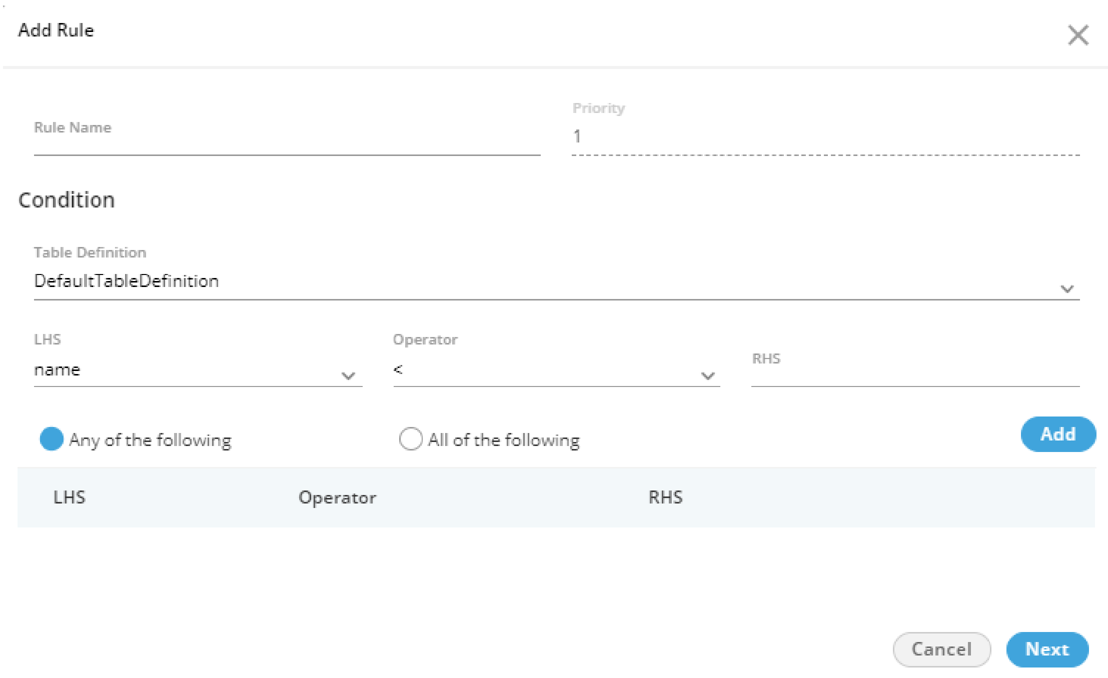


Figure: Pop-up to add a box

2. Provide a name for the new rule.
3. Select the default or another custom table definition.
4. In LHS (Left Hand Side) drop-down menu, you have to select any of the following options.

- twitter
- timezone
- facebook
- phone2
- name
- phone3
- phone4
- phone5
- email
- phone1

5. After selecting an option in LHS, you have to select any of the following oeprators in "Operator" drop-down menu.
    - <
    - =
    - !=
    - >
6. Now, provide a value in "RHS" text field.
7. Click "Add" to add this filter. The added filter will be listed as a row in the textarea.

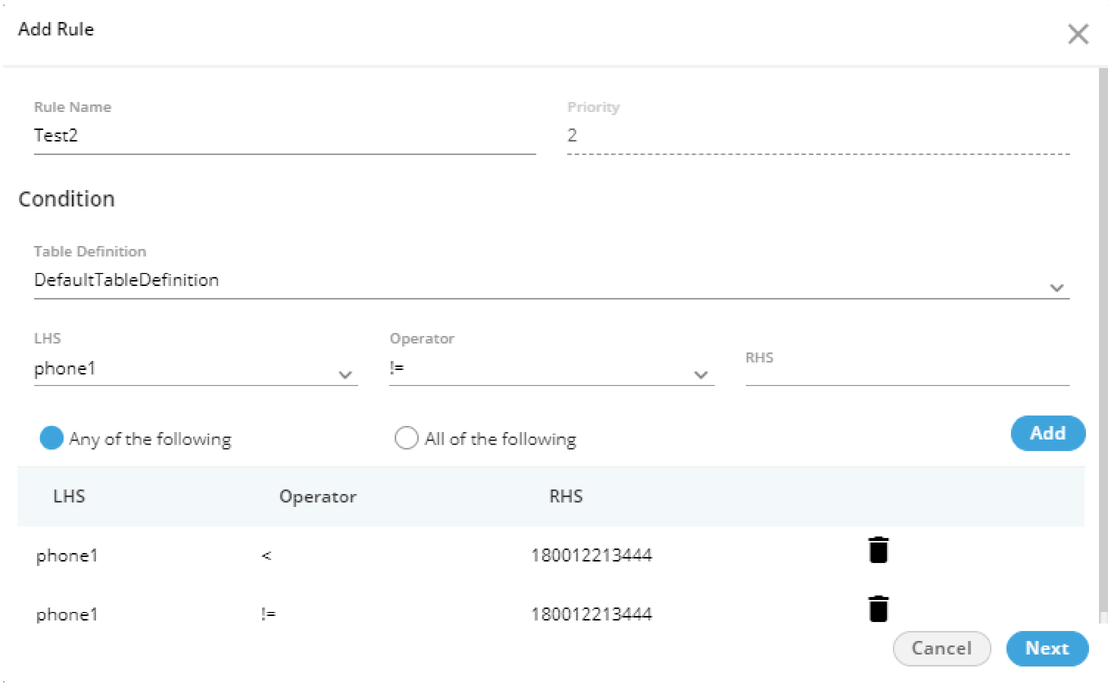


Figure: Sample Details to add a Rule

As per above screenshot, the leads having number less than 180012213444 and not equal to 180012213444 will be filtered for a campaign.

You can add multiple filters using these steps.

8. You can select any of the followiong option to specify the applicability of the multiple filters.
    - **Any of the following:** Any of the listed filters should be matched.
    - **All of the following:** All listed filters should be matched.
9. Click "Next" to proceed. It shows the following pop-up.

Figure: Adding Atomic Rule

10. You have to select any of the following rule type here.
    - **New:** Select it to create a new rule for the selected campaign.
    - **Update and Migrate:** Select it to update the existing rule and migrate these new conditions to it.
    - **Update:** Select it to update the existing rule in the selected campaign.
11. Select the campaign for which you want to create the rule.
12. In "Lead" drop-down menu, you have to select the lead upon which the rule will be applied.
13. Click "Finish" to create the rule.You can create multiple rules for same or different campaigns to filter the same or different leads using these steps.

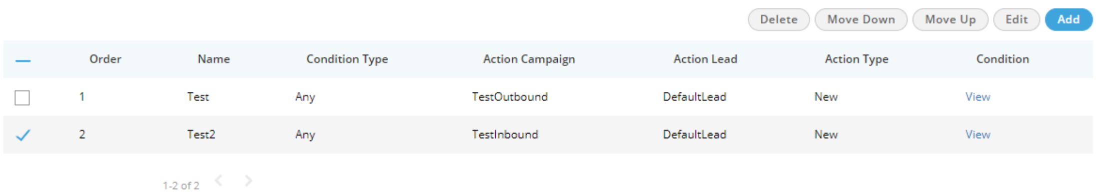


Figure: Added Multiple Rules

8.14.2 Priortize the Rules

The rules are executed in sequential order from top to bottom. Perform the following steps to manage the prioritization of multiple rules.

1. Select a rule.
2. Click "Move Up" to move the rule up. Now, this rule will be executed before other rules located below.
3. Click "Move Down" to move the rule down. Now, this rule will be executed only after the execution of rules located above.

8.14.3 Edit a Rule

Perform the following steps to edit a rule.

1. Select a rule and click "Edit" button. It shows the following pop-up.

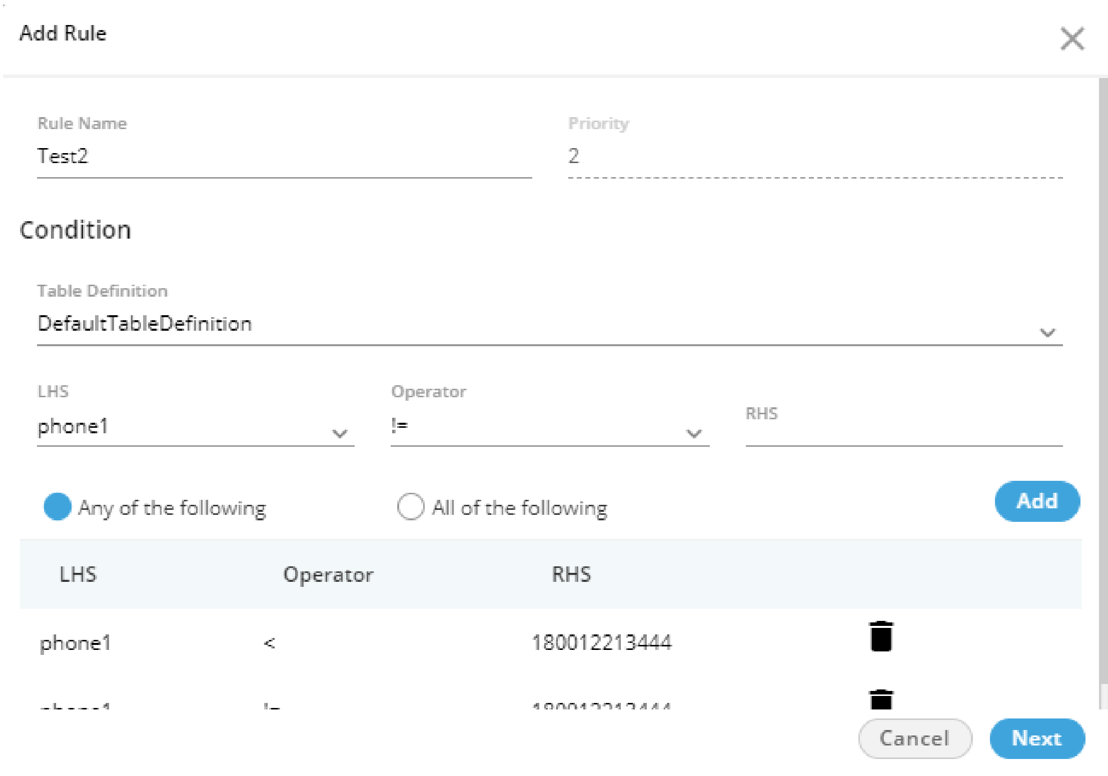


Figure: Edit a Rule

2. You can make the following changes here.
   - Rule Name
   - Table Definition
   - LHS
   - Operator
   - RHS
3. Click "Next" to proceed.

Figure: Edit a Rule

4. Here, you can make the following changes.
   - Rule Type
   - Campaign
   - Lead
5. Click "Finish" to save the changes.

   Rather you can click "Cancel" to discard the changes.

   You can click "Back" to go back to the previous pop-up of editing the rule.

8.14.4 Delete a Rule

The Deleted Rule cannot be retrieved back. Also, the deleted rule will not be applicable on the selected campaign.

Perform the following steps to delete a rule.

1. Select a rule and click "Delete". The following warning message is displayed on the screen.

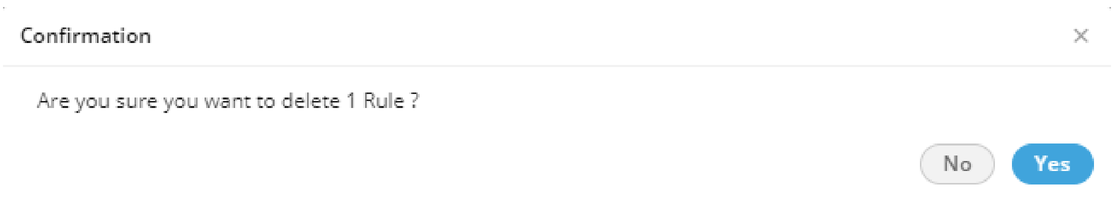


Figure: Delete a Rule

2. Click "Yes" to delete the rule.

   Rather, you can click "No" to not delete the rule.

8.15 Automation Rule

8.15.1 Automation Rules

The Automation Rules allows you to create the timer-based and event-based rules that runs automatically.

Figure: Automation Rule Tab

Click the following rules to know about the two types of Automation Rules.

1. **Event-based Automation Rule**
2. **Timer-based Automation Rule**

8.15.2 Event Based Automation Rules

The event based rules are executed automatically upon detecting the occurence of an event.

Figure: Automation Rule Tab

8.15.2.1 Create an Event Based Rule

Perform the following steps to create an event-based rule.

1. Click "New Rule" to create a new rule. The following fields are displayed in the blank area.

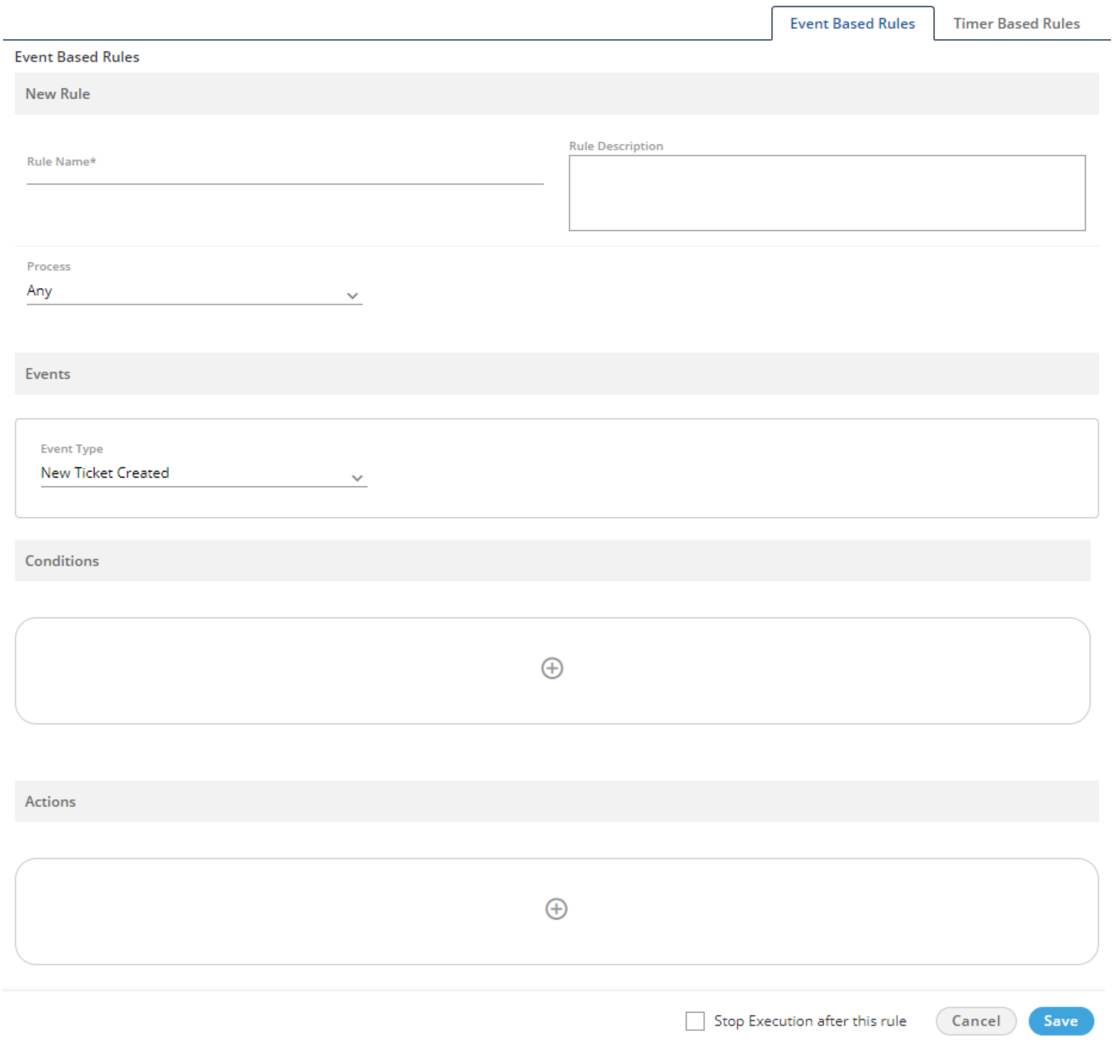


Figure: Add an Event Based Rule

2. Provide a name for the new rule.
3. Provide a description for the rule.
4. Select a process in which the rule will be applicable.
5. After selecting, the process, you have to select the campaign in which the rule will be applicable.
6. **Events:** Select any of the following events for which you want to create this rule.
   - **New Ticket Created:** This event is generated when a new ticket is created in Ameyo through email, call, manual, or any API.

- **New Lite Ticket Created:** This event is generated whenever an update to lite ticket is detected such as escalation is changed, priority is changed, status is changed, new message is received, subject is changed, and others.
- **Ticket Updated:** This event is generated whenever an update to a ticket is detected such as escalation is changed, priority is changed, status is changed, new message is received, subject is changed, and others. Selecting it shows an adjacent drop-down menu containing the following options.

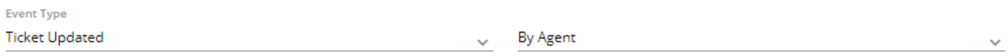


Figure: Ticket Updated Event

- **Ticket Transferred To Agent:** This event is generated whenever a ticket is transferred from Supervisor to Agent (vice versa) or Agent to Agent and auto-assigned to agent in queue. Selecting it shows two adjacent drop-down menus that lets you select the ticket assignor and ticket assignee.

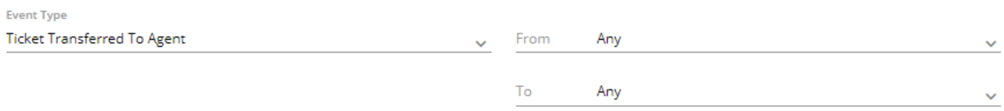


Figure: Ticket Transferred to Agent Event

- **Priority Changed:** This event is generated whenever the priority of any ticket is changed to "Low", "Medium", and "High". Selecting it shows the two adjacent drop-down menus that lets you select the previous and current priority value.

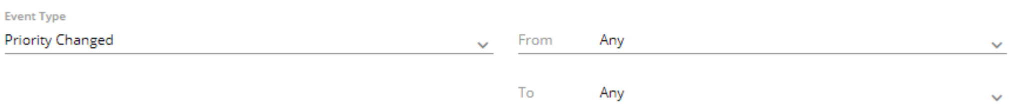


Figure: Priority Changed Event

- **Private Note Added:** This event is generated whenever a private note is added to the ticket.

- **Public Note Added:** This event is generated whenever a public note is added to the ticket.
- **Message Sent:** This event is generated whenever a message is sent out as reply from ticket.
- **Ticket Status Changed:** This event is generated whenever the status of a ticket is changed. Selecting it shows the two adjacent drop-down menus that lets you select the previous and current ticket status.

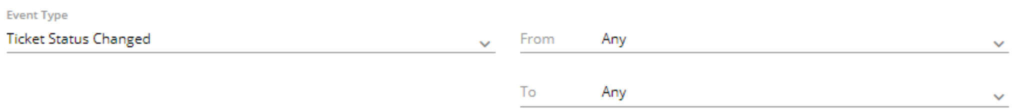


Figure: Ticket Status Changed Event

- **Heat Value Changed:** This event is generated whenever the Heat value is changed, greater than or less than a defined value. Selecting it shows a drop-down menu (to select a sub-condition) and a text field to provide user defined value.

Figure: Heat Value Changed Event

- **Mail Sending Failed:** This event is generated whenever the mail sending is failed due to the failure of Exchange Server or internal mail service.
- **Custom Field Updated:** This event is generated whenever a custom field is updated or changed. Selecting it shows an adjacent drop-down menu.

Figure: Custom Field Changed Event

- **Ticket Escalated:** This event is generated whenever a ticket is escalated.
- **Ticket Deescalate:** This event is generated whenever a ticket is de-escalated.

- **Ticket Picked Manually:** This event is generated whenever a ticket is picked manually.
- **Resolve SLA Breached:** This event is generated whenever the SLA (Service Level Agreement) of resolving a ticket is breached.
- **First Assign SLA Breached:** This event is generated whenever the very first assigned SLA (Service Level Agreement) of a ticket is breached.
- **First Response SLA Breached:** This event is generated whenever the very first response SLA (Service Level Agreement) of a ticket is breached.
- **New Message Received:** This event is generated whenever a new message is received.
- **Ticket Reopened:** This event is generated whenever a ticket is reopened.

7. **Conditions:** Here, you can specify the conditions based upon which the actions will be taken. Perform the following steps.

6.

A. Click icon in the middle of "Condition" box to add a new condition. It shows the following section.

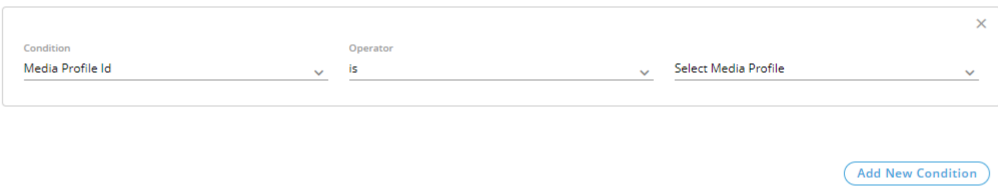


Figure: Add a Condition

B. Click "Condition" drop-down menu to select any of the following conditions.

I.

II. **Media Profile ID:** Select it to add a condition based upon the ID of the media profile. It contains the following operators.

- is
- is not

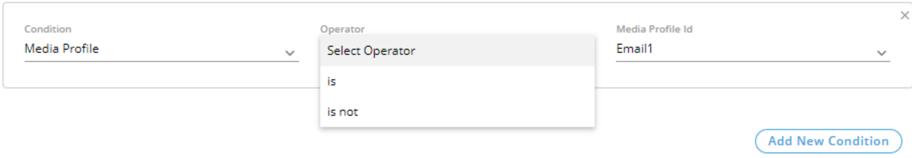


Figure: Condition for Media Profile

Select a media profile ID after selecting an operator.

III. **Ticket Status:** Select it to add a condition based upon "Ticket Status". It contains following operators.

- is
- is not

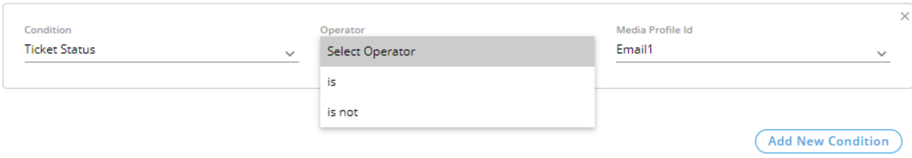


Figure: "Ticket Status" Condition

Provide a value in the text field after selecting an operator.

IV. **Current Time:** Select it to add a condition based upon "Current Time". It contains following operators.

- is
- is not
- greater than
- less than
- Within

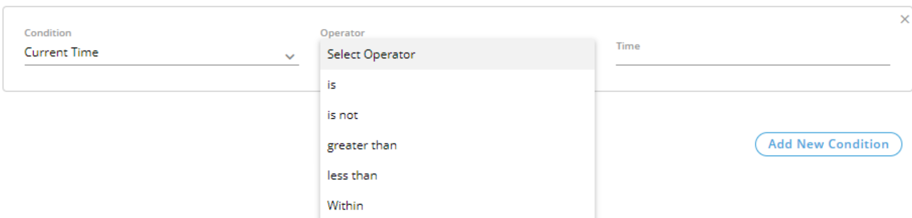


Figure: "Current Time" Condition

Provide a value in the text field after selecting an operator.

V. **Queue:** Select it to add a condition based upon "Queue". It contains following operators.

- is
- is not
- greater than
- less than
- Within

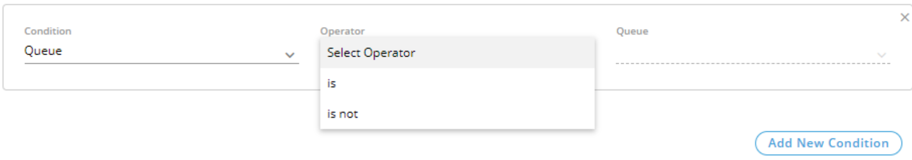


Figure: "Queue" Condition

Select the queue after selecting an operator.

VI. **Priority:** Select it to add a condition based upon "Priority". It contains following operators.

- is
- is not

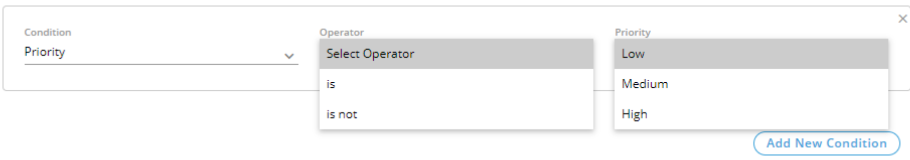


Figure: "Priority" Condition

Select an operator and then select a priority value.

VII. **Subject:** Select it to add a condition based upon the subject. It contains following operators.

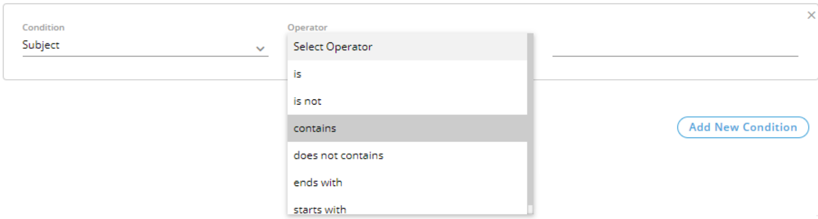
- is
- is not
- contains
- does not contain
- ends with
- starts with
- 

Figure: Subject Condition

VIII. After selecting an operator, provide a value in the adjoining text field.

IX. **Other Conditions:** In addition to above, following other conditions are also available. They are listed here collectivity as the steps to select any of them is similar.

- timezone: Select it to set a condition based on timezone.
- twitter: Select it to set a condition based on Twitter username.
- facebook: Select it to set a condition based on Facebok Username.
- phone2: Select it to set a condition based on phone number given in "phone2" field.
- name: Select it to set a condition based on customer's name.
- phone3: Select it to set a condition based on phone number given in "phone3" field.
- phone4: Select it to set a condition based on phone number given in "phone4" field.

- phone5: Select it to set a condition based on phone number given in "phone5" field.
- email: Select it to set a condition based on email address.
- phone1: Select it to set a condition based on phone number given in "phone1" field.

After selecting any of the above condition, you have to select any of the following operators.

- is
- is not

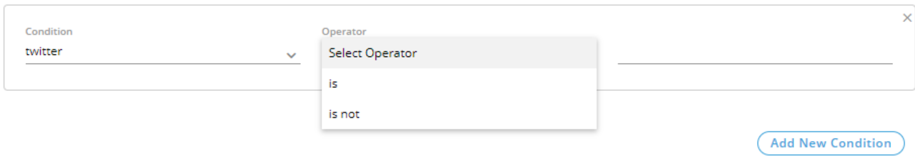


Figure: Other Condition

Provide a value in the adjoining text field after selecting an operator.

C. You can add multiple conditions using the steps discussed above.

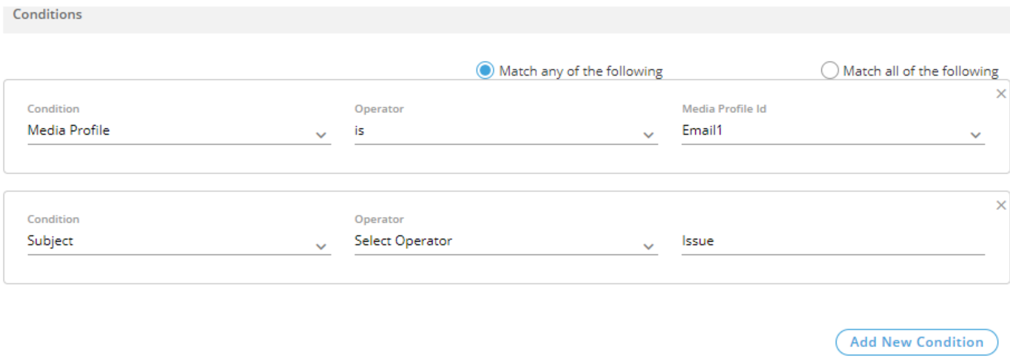


Figure: Multiple Conditions

When multiple conditions are added, the following new options are displayed on the top of "Conditions" Tab.

6.

A.

- **Match any of the following:** Select this option to apply any of the conditions on the messages.
- **Match all of the following:** Select this option to apply both conditions collectively. Either both conditions will be applied or no one will be applied.

You can click "X" icon on the top right corner of an condition to remove it.

7. **Actions:** You can select actions in this section, which will be performed only upon those messages which meet the pre-selected conditions. Perform the following steps.

   A. Click ⊕ icon to add an action. it shows a section.

   B. You click the drop-down menu to select any of the following actions.

7.

   A.

      I.

      II. **Escalate Ticket:** Select it to escalate the tickets which meets the pre-selected conditions.

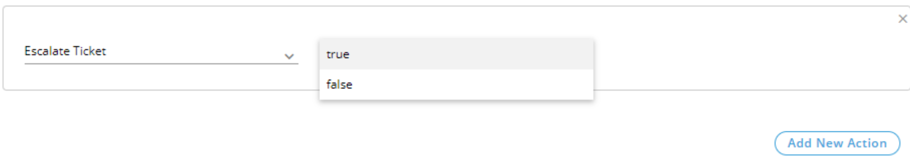


Figure: Escalate Ticket

Select any of the following operators.

- true: Select it to escalate the ticket.
- false: Select it to not escalate the ticket.

      III. **Set Custom Field:** Select it to set a custom field on those tickets who meet the pre-selected conditions.

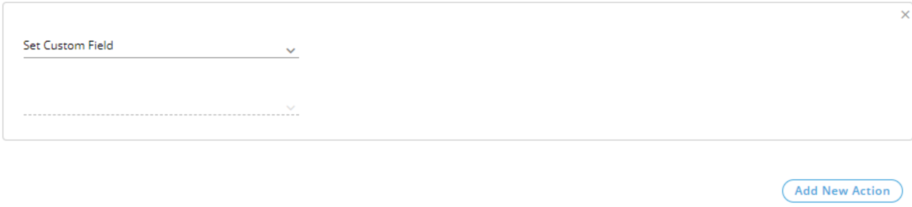


Figure: Custom Field Action

Select a custom field from the provided options.

IV. **Transfer Ticket to Queue:** Select it to transfer those tickets to the selected queue and the selected agent which meets the pre-selected conditions.

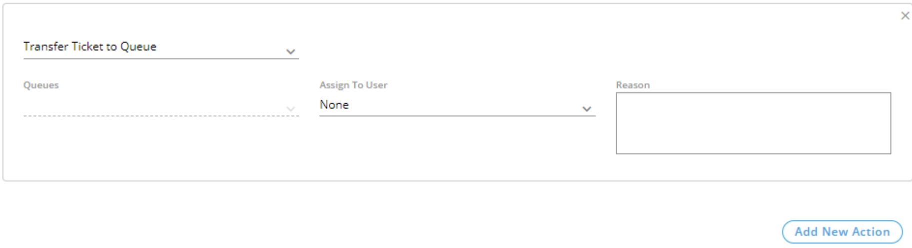


Figure: Transfer to Queue

Select a queue and then select any of the following option in "Assign to User" drop-down menu.

- Available Agent: Select it to transfer the agent who is available either to take call or take ticket.
- Agent Available to Take Tickets: Select it to transfer the agent who is available to take ticket.
- Any Agent: Select it to transfer the ticket to any agent whether the agent is available for call, email, or chat or not available at all.

V. **Send Email To:** Select it to send an email to any recipient for those tickets which meets the pre-selected conditions.

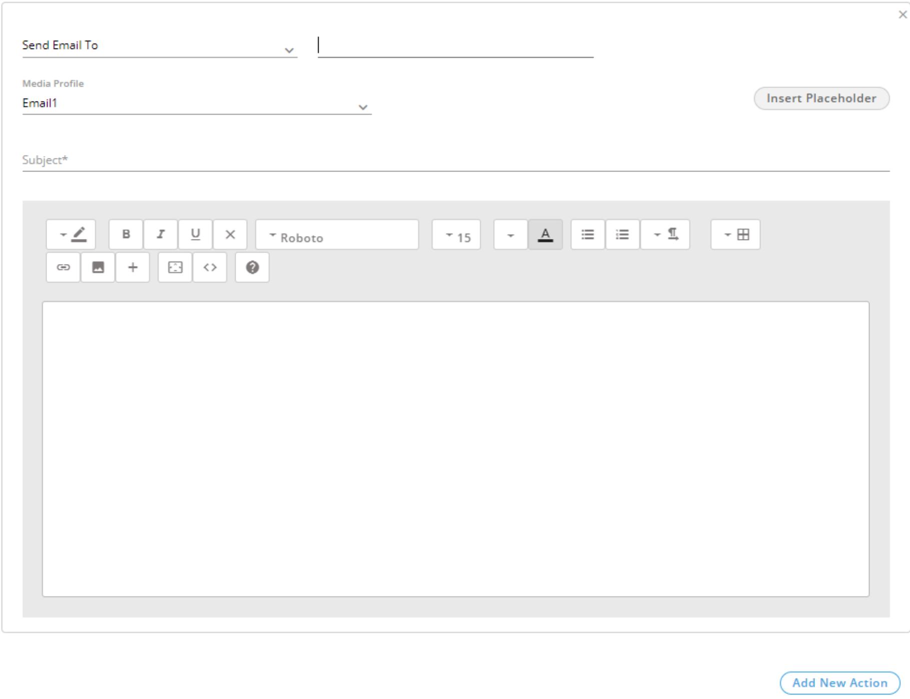


Figure: Send Email To Action

- Enter the email address of the recipient in the very first text field.
- Select the media profile in "Media Profile" drop-down menu.
- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.
- You can click "Insert Placeholders" button to add the placeholders in the message body.

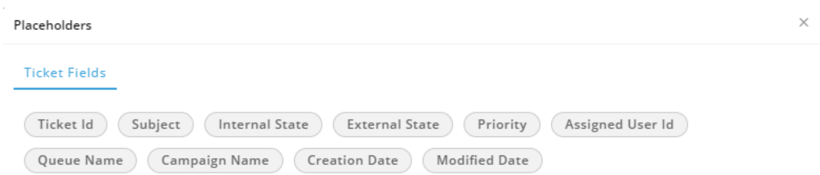


Figure: Placeholders

- Following is screenshot of such a message.

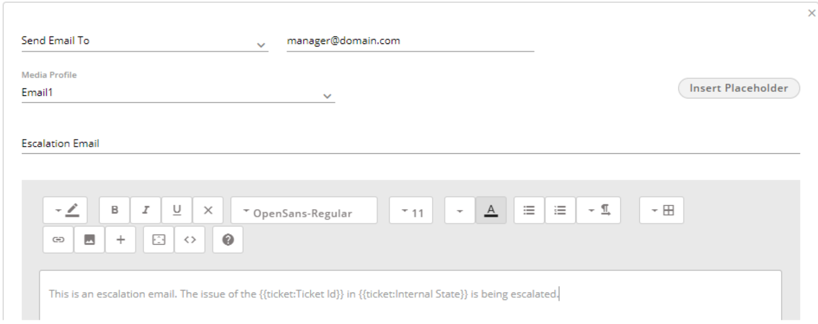


Figure: Sample Email

VI. **Send Email To All Supervisors:** Select it to send an email to all supervisors for those tickets which meets the pre-selected conditions.

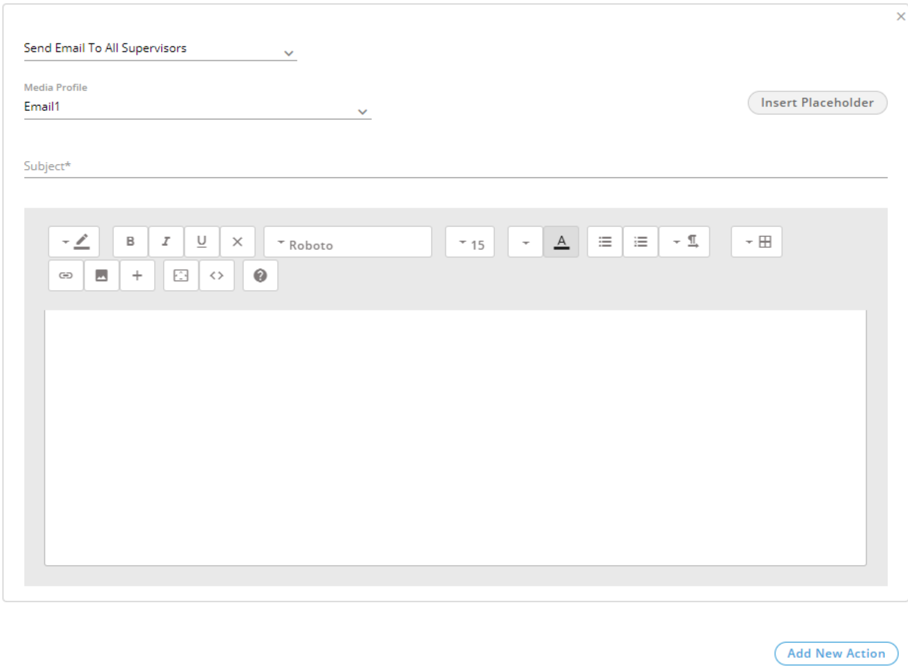


Figure: Send Email To All Supervisors

- Select the media profile in "Media Profile" drop-down menu.
- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.
- You can click "Insert Placeholders" button to add the placeholders in the message body.

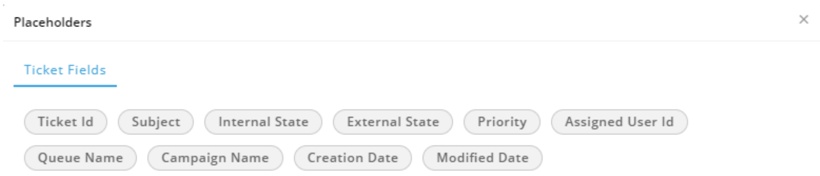


Figure: Placeholders

- Following is screenshot of such a message.

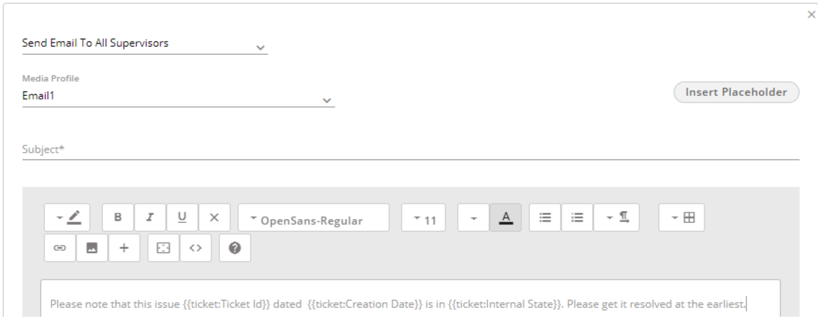


Figure: Sample Email

VII. **Send Email To Agent:** Select it to send an email to the selected agent for those tickets which meets the pre-selected conditions.

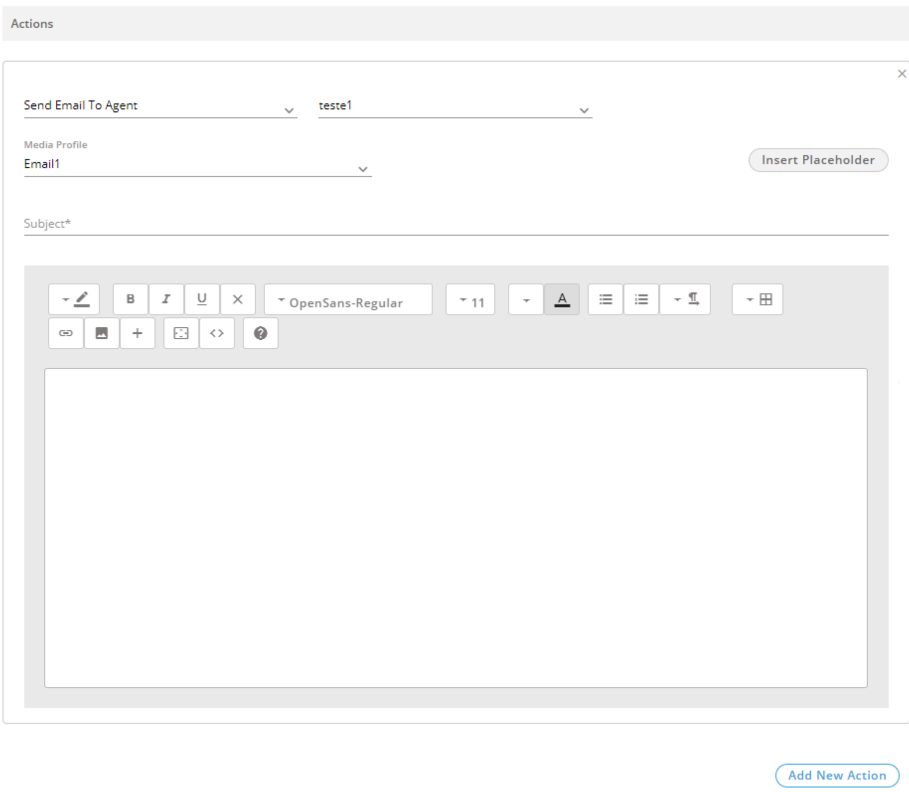


Figure: Send Email To Agent

- All the agents in the already selected campaign and process will be listed in the drop-down menu. Select an agent to whom you want to send the email.
- Select the media profile in "Media Profile" drop-down menu.
- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.
- You can click "Insert Placeholders" button to add the placeholders in the message body.

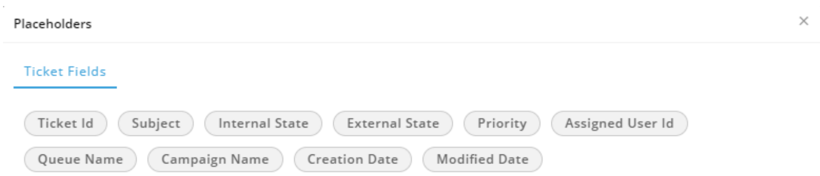


Figure: Placeholders

- Following is screenshot of such a message.

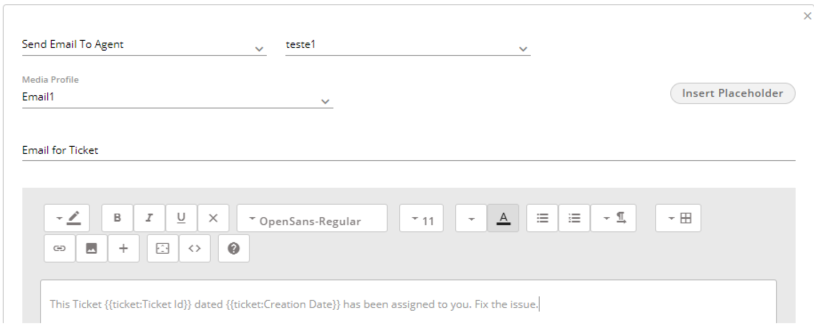


Figure: Sample Email

VIII. **Send Email To All Agents Assigned to Queue:** Select it to send an email to all agents assigned to the queue for those tickets which meets the pre-selected conditions.

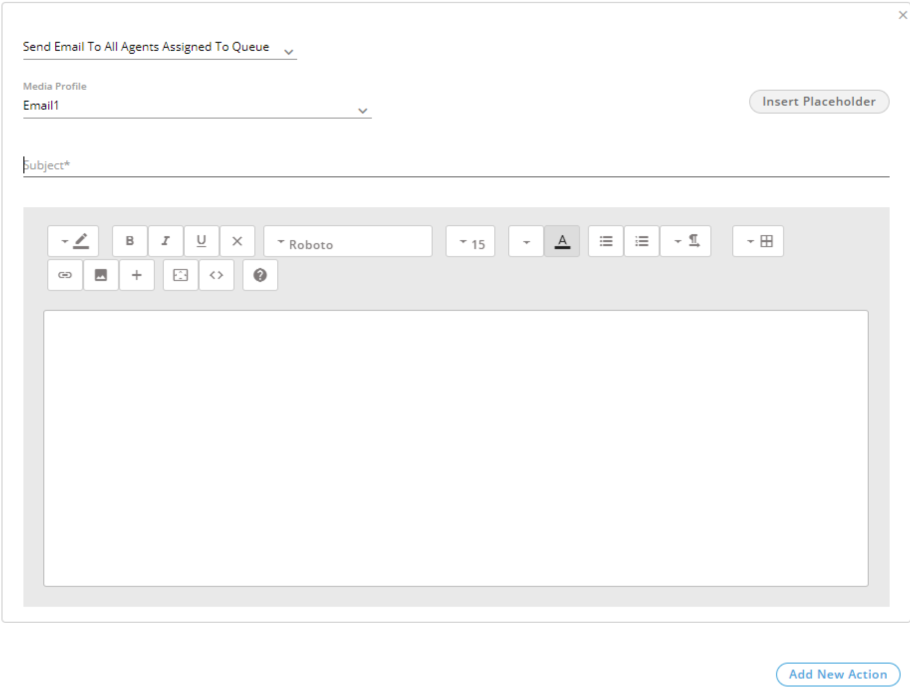


Figure: Send Email To All Agents Assgined to the Queue

- Select the media profile in "Media Profile" drop-down menu.
- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.
- You can click "Insert Placeholders" button to add the placeholders in the message body.

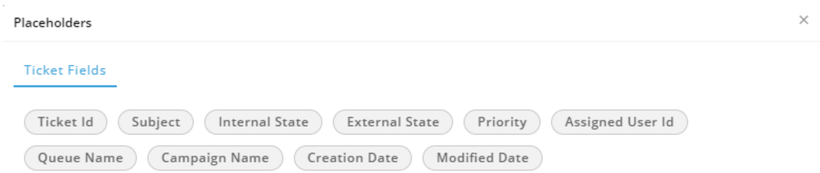


Figure: Placeholders

- Following is screenshot of such a message.

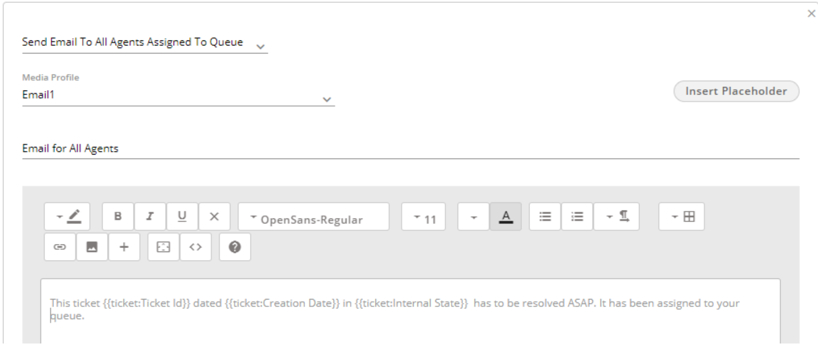


Figure: Sample Email

IX. **Send Email To Requester:** Select it to send an email to the requester for those tickets which meets the pre-selected conditions.

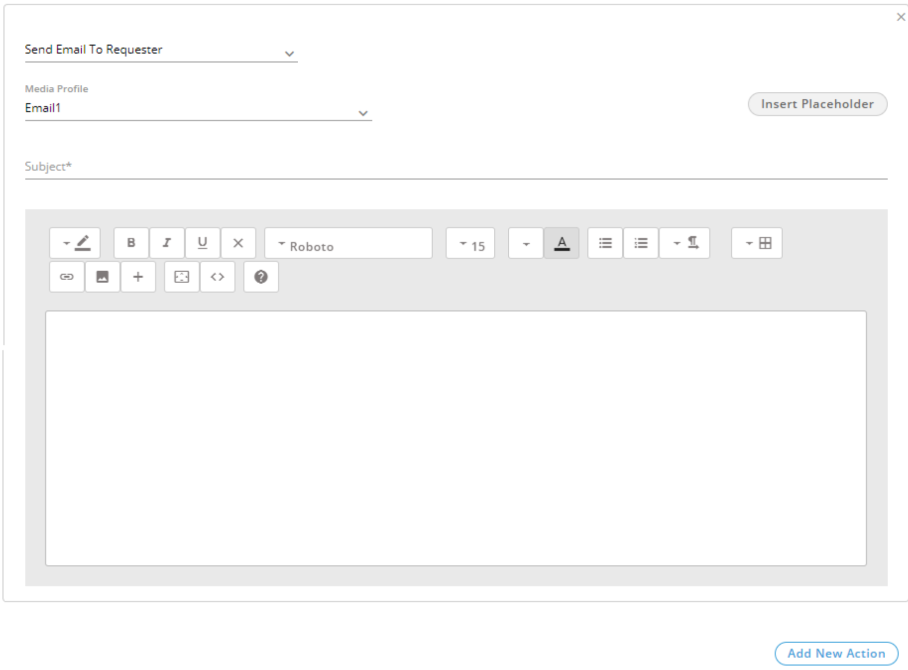


Figure: Send Email To Requester

- Select the media profile in "Media Profile" drop-down menu.
- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.

- You can click "Insert Placeholders" button to add the placeholders in the message body.

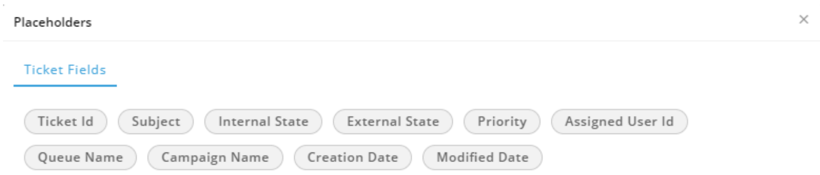


Figure: Placeholders

- Following is screenshot of such a message.

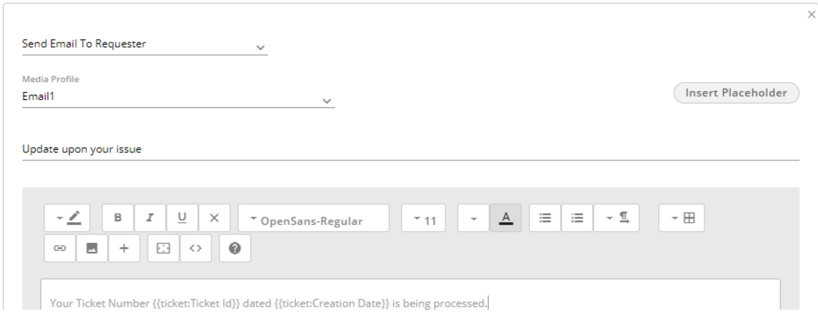


Figure: Sample Email

X. **Send Feedback To Requester:** Select it to send a feedback email to the requester for those tickets which meets the pre-selected conditions.

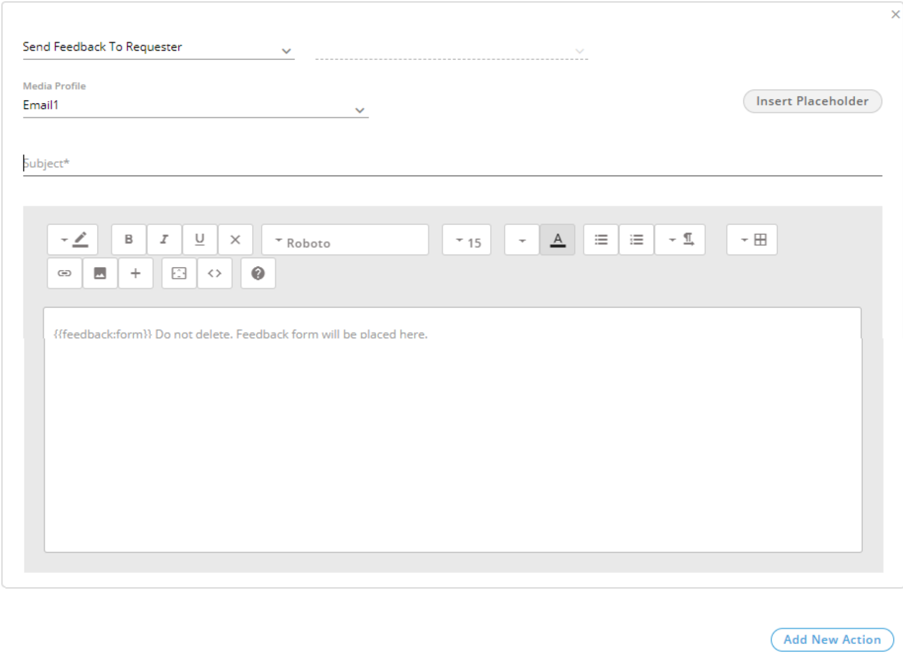


Figure: Send Feedback To Requester

- Select the media profile in "Media Profile" drop-down menu.
- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.
- You can click "Insert Placeholders" button to add the placeholders in the message body.

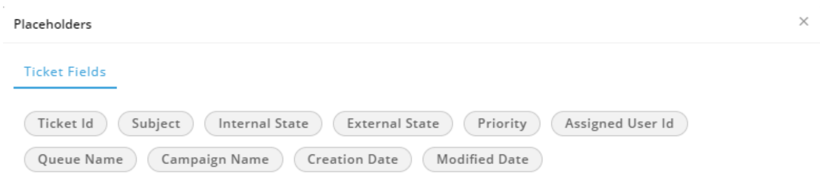


Figure: Placeholders

- Do not delete {{feedback:form}} as this is the placeholder for the Feedback form. If it is deleted, feedback form will not be placed.

Following is screenshot of such a message.

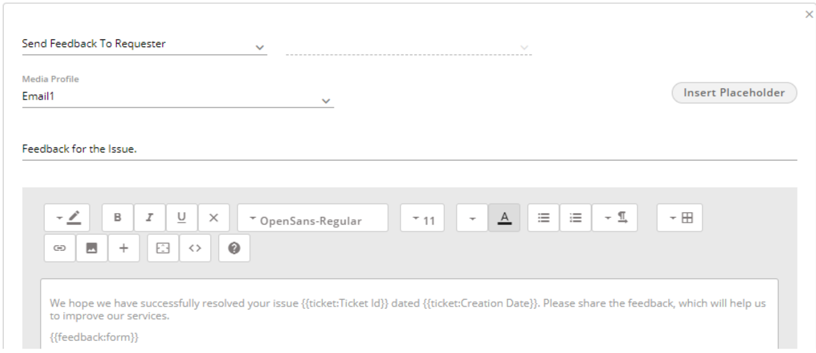


Figure: Sample Feedback Email

XI. **Assign Ticket to Agent:** Select it to assign those tickets to the selected agent which meets the pre-selected conditions.

Figure: Send Email To All Supervisors

The agents available in the previously selected campaign and process are listed in the drop-down menu. You just have to select the agent here.

XII. **Set Status:** Select it to set the status of those tickets which meets the pre-selected conditions.

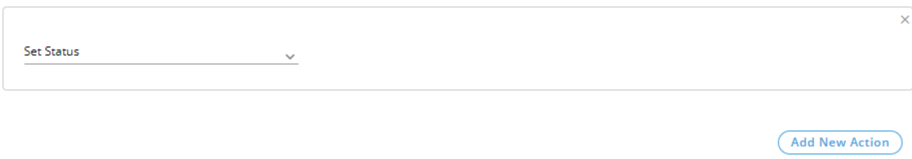


Figure: "Set Status" Action

XIII. **Priority:** Select it to increase or decrease the priority of those tickets which meets the pre-selected conditions.

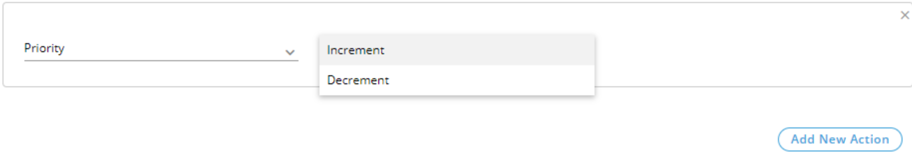


Figure: "Priority" Action

Select any of the following options in the drop-down menu.

- Increment: Select it to increase the priority of the ticket.
- Decrement: Select it to decrease the priority of the ticket.

XIV. **Set Priority:** Select it to set the priority of those tickets which meets the pre-selected conditions.

Figure: "Set Priority" Action

Select any of the following options in the drop-down menu.

- Low
- Medium
- High

XV. **HTTP Action:** Select it to apply HTTP Action (also called Webhook) to trigger an external API to process those messages which meet the pre-selected conditions. Please refer to "HTTP Action" Page to know more about the same.

You can follow the same steps to add different kinds of multiple actions. They will run in sequential order from top to bottom.

8. Following is a sample screenshot containing an Event-Based Rule with sample details.

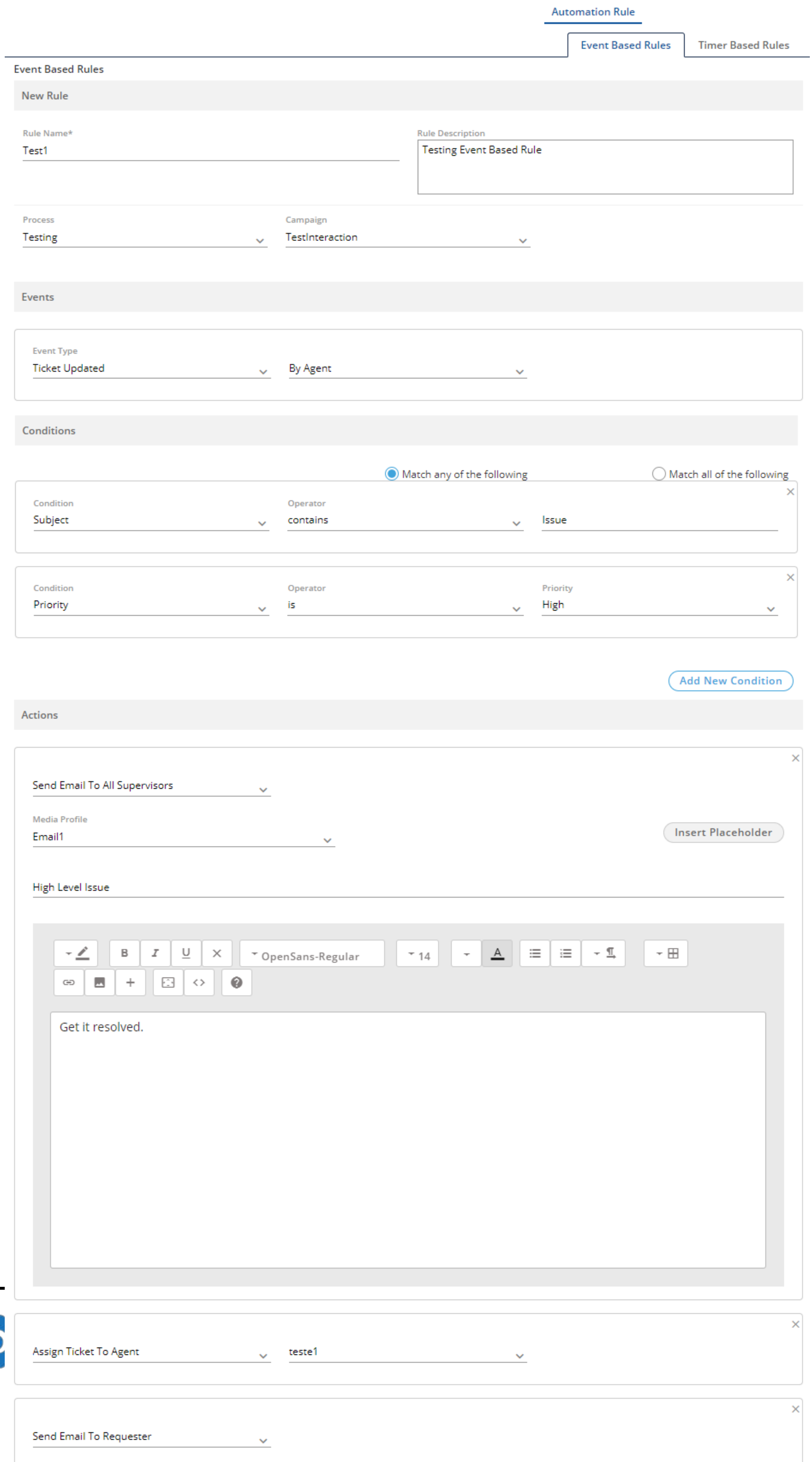

Automation Rule
Event Based Rules
Timer Based Rules
Event Based Rules
New Rule
Rule Name*
Test1
Rule Description
Testing Event Based Rule
Process
Testing
Campaign
TestInteraction
Events
Event Type
Ticket Updated
By Agent
Conditions
Match any of the following
Match all of the following
Condition
Subject
Operator
contains
Issue
Condition
Priority
Operator
is
Priority
High
Add New Condition
Actions
Send Email To All Supervisors
Media Profile
Email1
Insert Placeholder
High Level Issue
OpenSans-Regular
14
Get it resolved.
Assign Ticket To Agent
teste1
Send Email To Requester

Figure: Sample Event-based Rule

9. You can check "Stop Execution after this rule" box to stop the execution of other selected actions in this rule.
10. Click "Save" to create the rule.You can create multiple rules for same or different campaigns to filter the tickets using these steps.

Figure: Added Multiple Event-based Rules

8.15.3 Enable or Disable the Rule

You can disable the rules. The disabled rules will be hidden, but you can make them visible. You can also enable the disabled rules.

8.15.3.1 Disable a Rule

Click the toggle switch on a rule to disable it. It shows the following message.

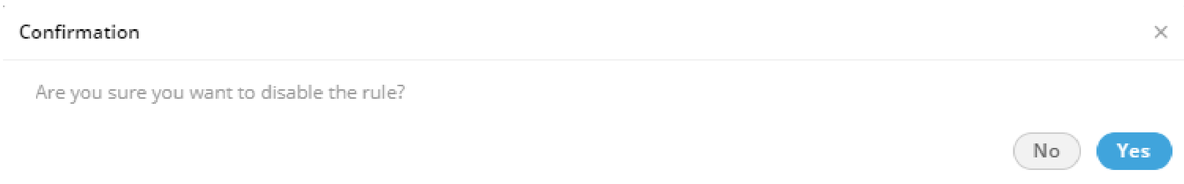


Figure: Asking to disable the rule

Click "Yes" to disable the selected rule. The disabled rule will not be applied in the already selected. Here, its details will be hidden. Following is a disabled rule.

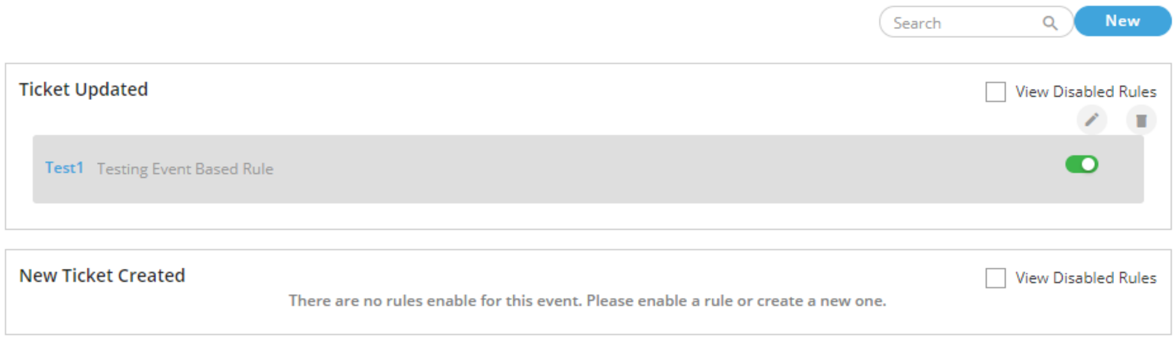


Figure: Disabled Rule

8.15.3.2 View the Details of Disabled Rules

In a disabled rule, click to check "View Disabled Rules" box to view its details.

Figure: Displaying the Details of Disabled Rule

8.15.3.3 Enable a Disabled Rule

To enable a disabled rule, click the gray toggle switch to enable it. The following message is displayed.

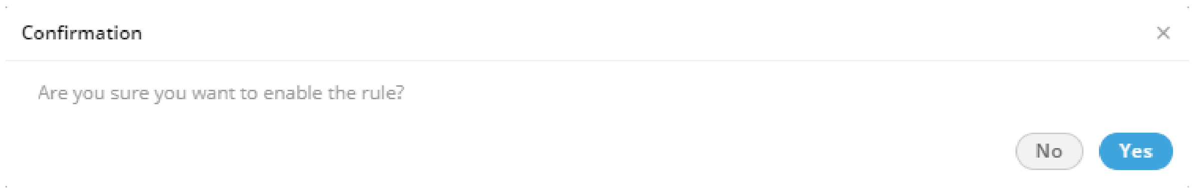


Figure: Asking to enable the rule

Click "Yes" to enable the selected rule. The enabled rule will be applied in the campaign, where it has been selected.

8.15.4 Edit an Event-based Rule

Perform the following steps to edit a rule.

1. Click a rule to select it and click icon. It shows the following pop-up.

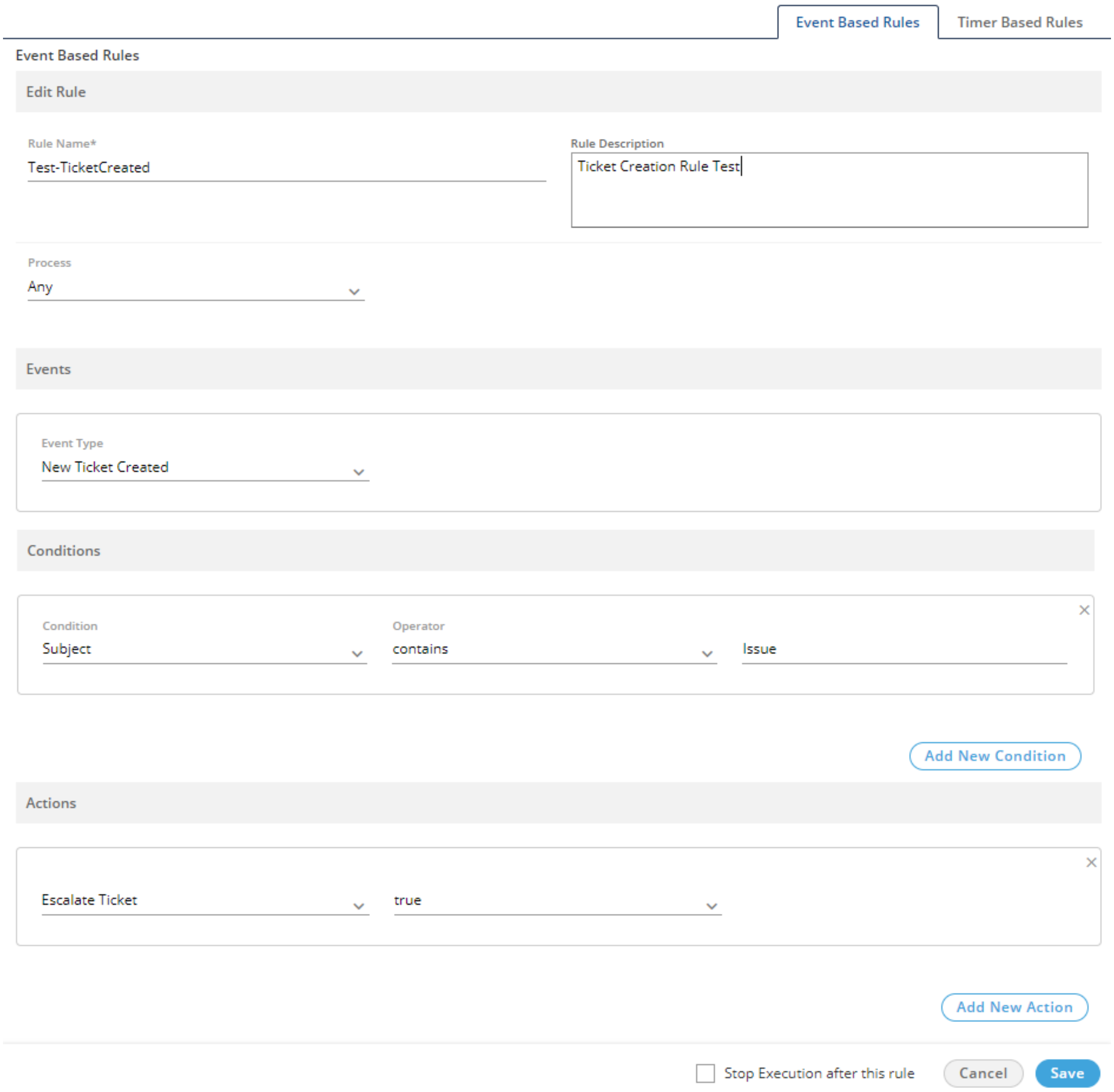


Figure: Edit an Even-based Rule

2. You can make the following changes here.
   - Rule Name
   - Rule Description
   - Process
   - Campaign
   - Event
   - Conditions
   - Actions

- Stop or Continue Execution of other Rules

You have to perform the same steps here, which you have performed while creating an Event-based Rule.

3. Click "Save" to save the changes.

   Rather you can click "Cancel" to discard the changes.

8.15.5 Delete an Event-based Rule

The Deleted Rule cannot be retrieved back. Also, the deleted rule will not be applicable in the selected campaign.

Perform the following steps to delete a rule.

1. Click to select a rule and click icon to remove it. The following warning message is displayed on the screen.

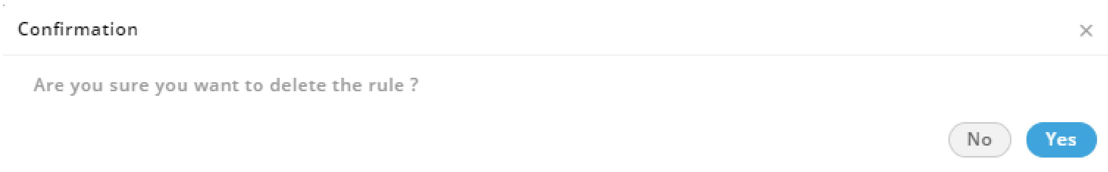


Figure: Warning before deleting an Event-based Rule

2. Click "Yes" to delete the rule.

   Rather, you can click "No" to not delete the rule.

8.15.6 Time Based Automation Rules

The timer based rules are executed only meeting the selected conditions.

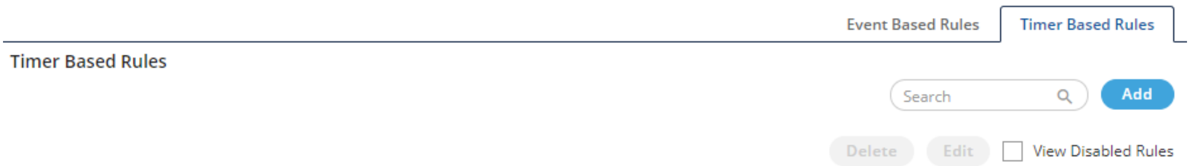


Figure: Timer-based Automation Rules

8.15.6.1 Create a Timer Based Rule

Perform the following steps to create a timer-based rule.

1. Click "Add" to create a new rule. The following fields are displayed in the blank area.

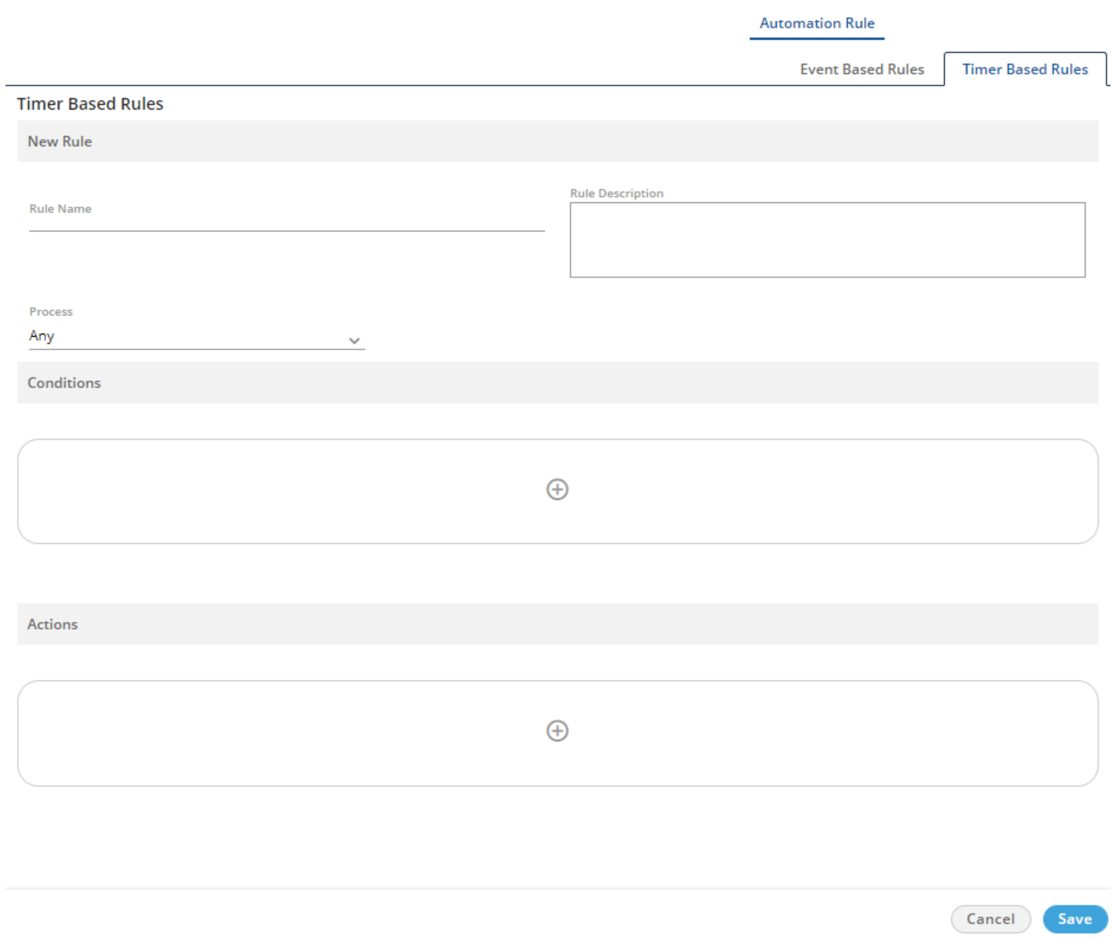


Figure: Add a Timer-based Rule

2. Provide a name for the new rule.
3. Provide a description for the rule.
4. Select a process in which the rule will be applicable.
5. After selecting, the process, you have to select the campaign in which the rule will be applicable.

6. **<u>Conditions</u>:** Here, you can specify the conditions based upon which the actions will be taken. Perform the following steps.

   A. Click icon in the middle of "Condition" box to add a new condition. It shows the following section.

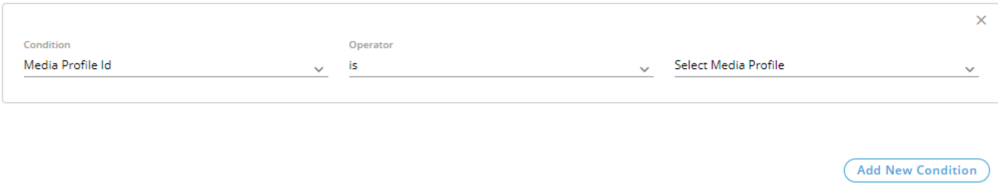


Figure: Add a Condition

   B. Click "Condition" drop-down menu to select any of the following conditions.

      I.

      II. **Queue:** Select it to add a condition based upon "Queue". It contains following operators.

         - is
         - is not
         - greater than
         - less than
         - Within

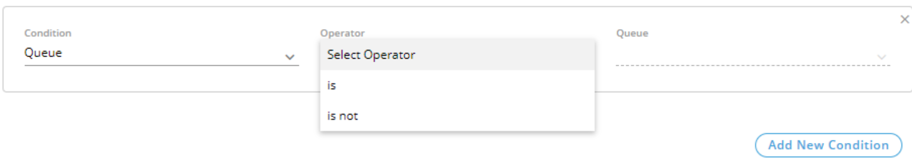


Figure: "Queue" Condition

      Select the queue after selecting an operator.

      III. **Current Time:** Select it to add a condition based upon "Current Time". It contains following operators.

         - is

- is not
- greater than
- less than
- Within

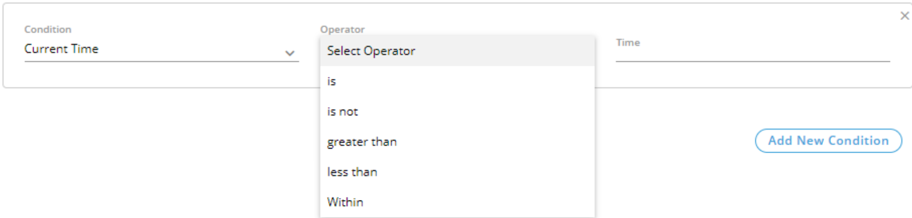


Figure: "Current Time" Condition

Provide a value in the text field after selecting an operator.

IV. **Media Profile ID:** Select it to add a condition based upon the ID of the media profile. It contains the following operators.

- is
- is not

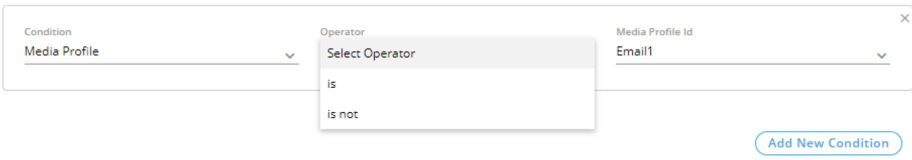


Figure: Condition for Media Profile

Select a media profile ID after selecting an operator.

V. **Subject:** Select it to add a condition based upon the subject. It contains following operators.

- is
- is not
- contains
- does not contain

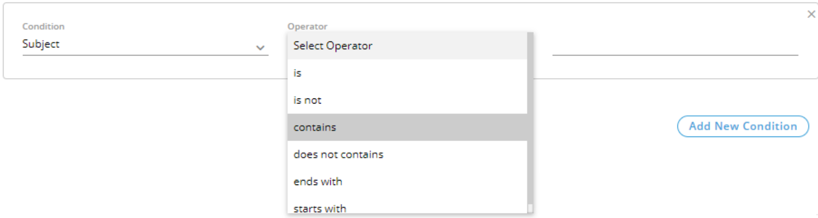
- ends with
- starts with
- 

Figure: Subject Condition

VI. After selecting an operator, provide a value in the adjoining text field.

VII. **Requester Email:** Select it to add a condition based upon the requester email address. It contains following operators.

- contains
- does not contain

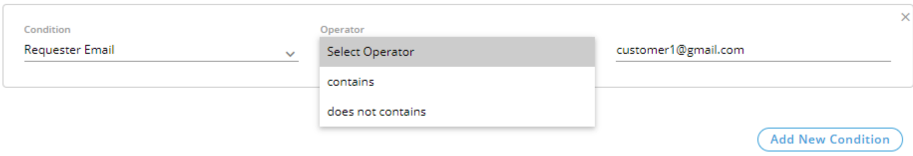


Figure: "Request Email Address" Condition

After selecting an operator, provide a value in the adjoining text field.

VIII. **Email CC:** Select it to add a condition based upon the email address in CC field. It contains following operators.

- contains
- does not contain

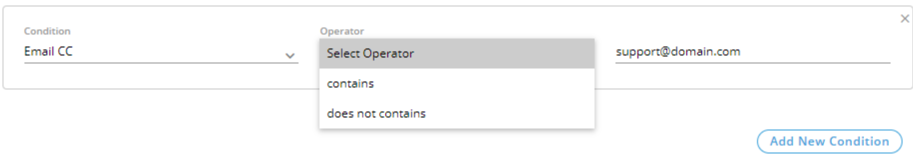


Figure: "Email CC" Condition

After selecting an operator, provide a value in the adjoining text field.

IX. **Ticket Status:** Select it to add a condition based upon "Ticket Status". It contains following operators.

- is
- is not

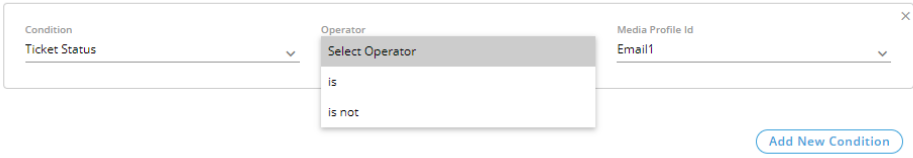


Figure: "Ticket Status" Condition

Provide a value in the text field after selecting an operator.

X. **Priority:** Select it to add a condition based upon "Priority". It contains following operators.

- is
- is not

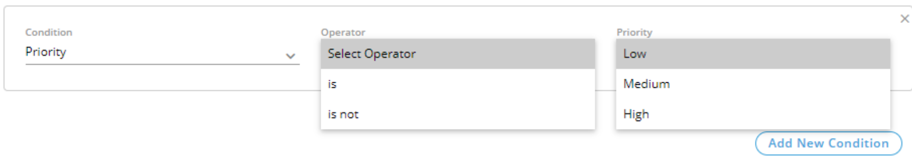


Figure: "Priority" Condition

Select an operator and then select a priority value.

XI. **Hour Since Created:** Select it to add a condition based upon the hours since the ticket has been created. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

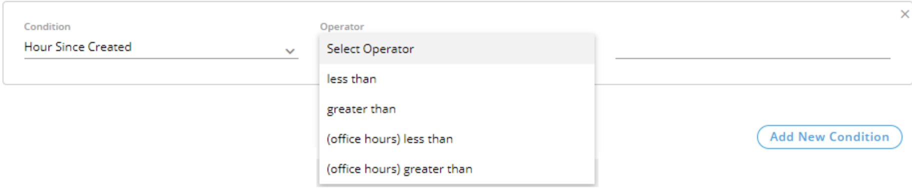


Figure: "Hours Since Created" Condition

Select an operator and provide a value.

XII. **Hour Since First Assigned:** Select it to add a condition based upon the hours since the ticket has been assigned at the very first time. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

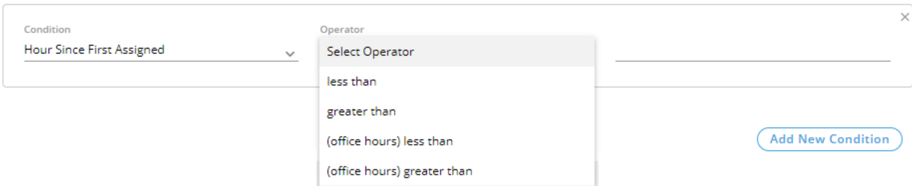


Figure: "Hours Since First Assigned" Condition

Select an operator and provide a value.

XIII. **Hour Since Resolved:** Select it to add a condition based upon the hours since the ticket has been resolved. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

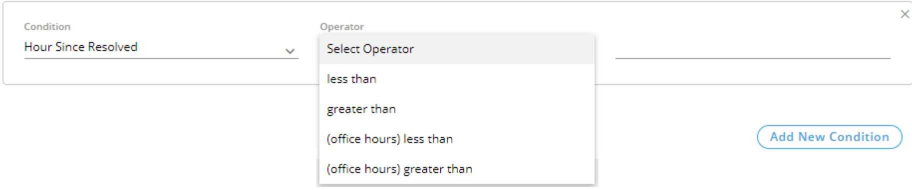


Figure: "Hours Since Resolved" Condition

Select an operator and provide a value.

XIV. **Hour Since Reopened:** Select it to add a condition based upon the hours since the ticket has been reopened. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

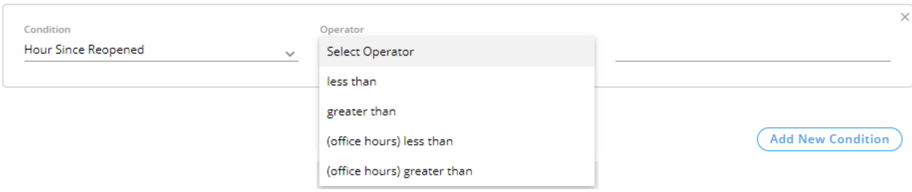


Figure: "Hours Since Reopened" Condition

Select an operator and provide a value.

XV. **Hour Since Unassigned:** Select it to add a condition based upon the hours since the ticket has been left unassigned. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

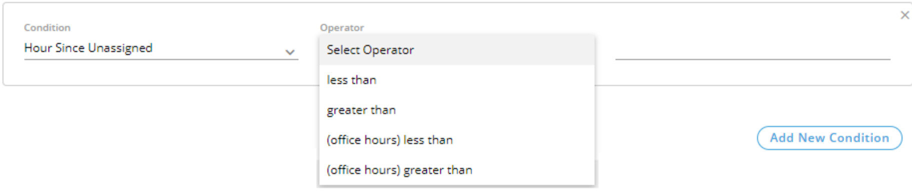


Figure: "Hours Since Unassigned" Condition

Select an operator and provide a value.

XVI. **Hour Since Agent Responded:** Select it to add a condition based upon the hours since the last response of agent on the ticket was sent through any medium such as chat, voice, email, or messaging. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

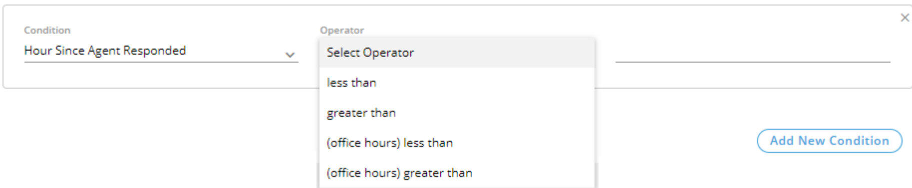


Figure: "Hours Since Agent Responded" Condition

Select an operator and provide a value.

XVII. **Hour Since Requester Responded:** Select it to add a condition based upon the hours since the last response of requester was received on the ticket through any medium such as chat, voice, email, or messaging. It contains following operators.

- less than
- greater than
- (office hours) less than

- (office hours) greater than

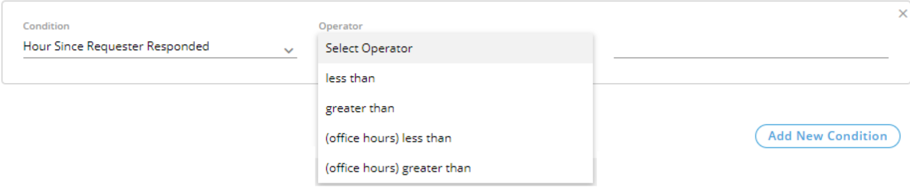


Figure: "Hours Since Requester Responded" Condition

Select an operator and provide a value.

XVIII. **Hour Since First Response Due:** Select it to add a condition based upon the hours since the the ticket is due for First Response SLA. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

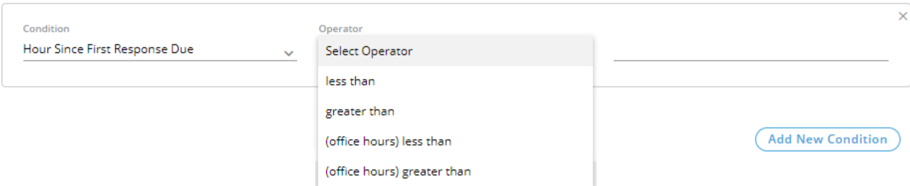


Figure: "Hours Since First Response Due" Condition

Select an operator and provide a value.

XIX. **Hour Since First Assign Due:** Select it to add a condition based upon the hours elapsed since the the ticket is not assigned for the very first time. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

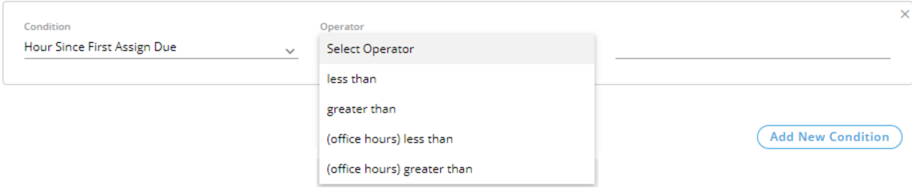


Figure: "Hours Since First Assign Due" Condition

Select an operator and provide a value.

XX. **Hour Since Ticket Resolution Due:** Select it to add a condition based upon the hours elapsed since the the ticket is due for resolution or closure. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

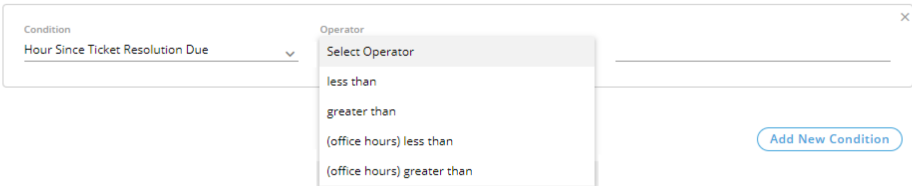


Figure: "Hours Since Ticket Resolution Due" Condition

Select an operator and provide a value.

XXI. **Requester Message Count:** Select it to add a condition based upon count of requester's messages. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

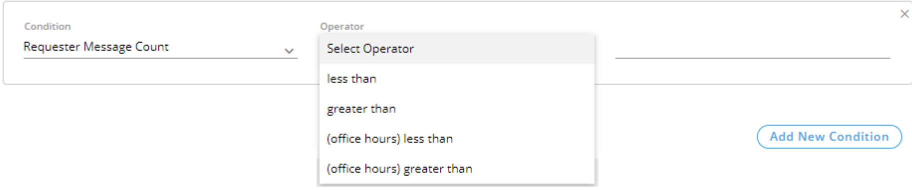


Figure: "Requester Message Count" Condition

Select an operator and provide a value.

XXII. **Agent Message Count:** Select it to add a condition based upon count of agent's messages. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

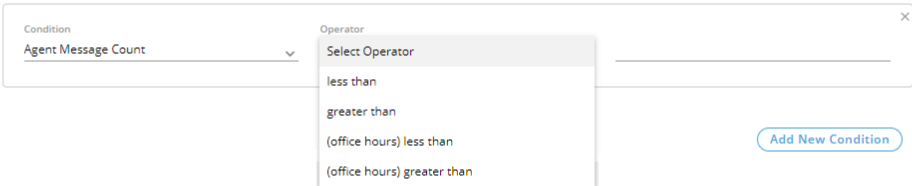


Figure: "Agent Message Count" Condition

Select an operator and provide a value.

XXIII. **Requester Message Count (Today):** Select it to add a condition based upon count of requester's messages received today. It contains following operators.

- less than
- greater than
- (office hours) less than
- (office hours) greater than

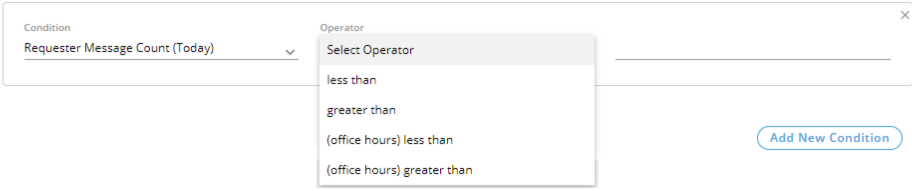


Figure: "Requester Message Count (Today)" Condition

Select an operator and provide a value.

XXIV. **Customer Current Sentiment:** This condition lets you filter the customers who are happy, irritated, or angry.
Select it to add a condition based upon the sentiment of customers. It contains following operators.

- is
- is not
- greater than
- less than
- Within

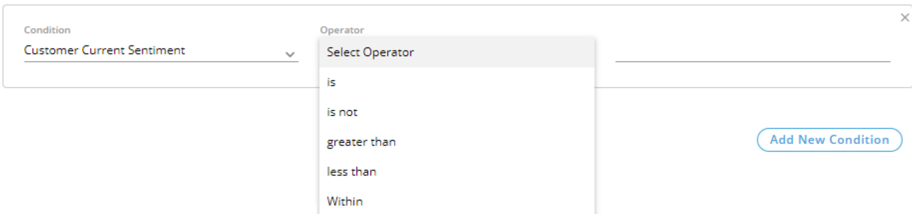


Figure: "Customer Current Sentiment" Condition

Select an operator and provide a value.

XXV. **Customer Overall Positive Index:** This condition lets you filter the customers upon their overall positive index.
Select it to add a condition based upon a customer's overall positive index. It contains following operators.

- is
- is not

- greater than
- less than
- Within

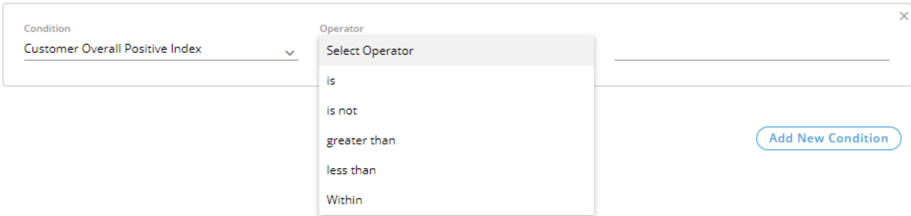


Figure: "Customer Overall Positive Index" Condition

Select an operator and provide a value.

XXVI. **Ticket Heat Index:** Select it to add a condition based upon the heat index of tickets. It contains following operators.

- is
- is not
- greater than
- less than
- Within

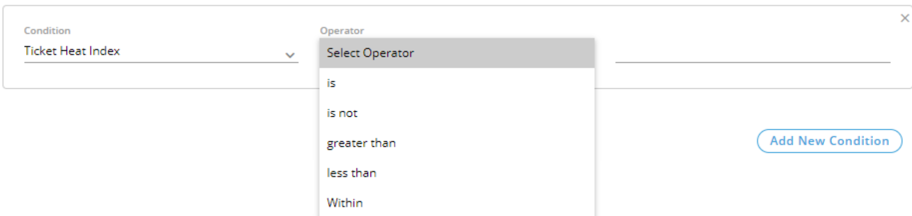


Figure: "Ticket Heat Index" Condition

Select an operator and provide a value.

C. You can add multiple conditions using the steps discussed above.

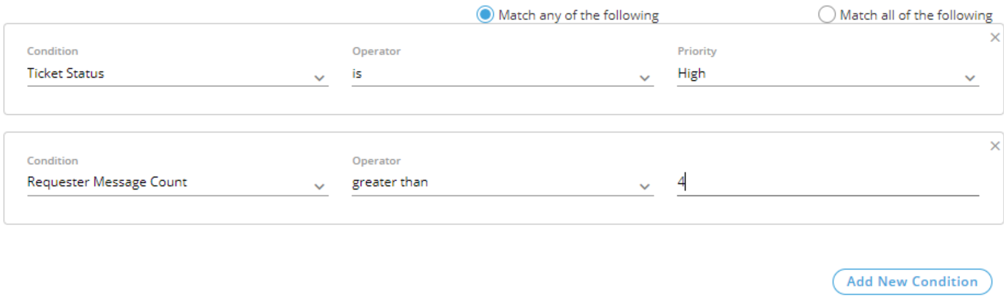


Figure: Multiple Conditions

When multiple conditions are added, the following new options are displayed on the top of "Conditions" Tab.

5.

A.

- **Match any of the following:** Select this option to apply any of the conditions on the messages.
- **Match all of the following:** Select this option to apply both conditions collectively. Either both conditions will be applied or no one will be applied.

You can click "X" icon on the top right corner of an condition to remove it.

6. **<u>Actions</u>:** You can select actions in this section, which will be performed only upon those messages which meet the pre-selected conditions. Perform the following steps.

   A. Click ⊕ icon to add an action. it shows a section.

   B. You click the drop-down menu to select any of the following actions.

6.

A.

I.

II. **Assign Ticket to Agent:** Select it to assign those tickets to the selected agent which meets the pre-selected conditions.

Figure: Send Email To All Supervisors

The agents available in the previously selected campaign and process are listed in the drop-down menu. You just have to select the agent here.

III. **Transfer Ticket to Queue:** Select it to transfer those tickets to the selected queue and the selected agent which meets the pre-selected conditions.

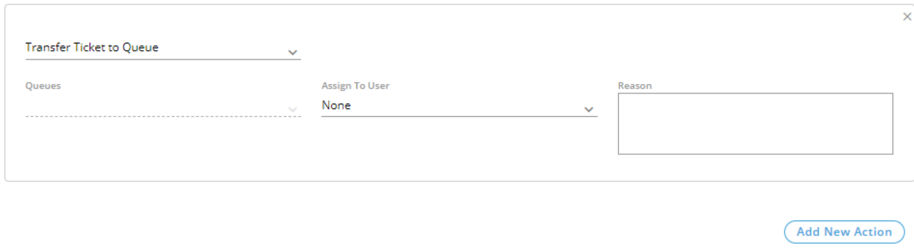


Figure: Transfer to Queue

Select a queue and then select any of the following option in "Assign to User" drop-down menu.

- Available Agent: Select it to transfer the agent who is available either to take call or take ticket.
- Agent Available to Take Tickets: Select it to transfer the agent who is available to take ticket.
- Any Agent: Select it to transfer the ticket to any agent whether the agent is available for call, email, or chat or not available at all.

IV. **Escalate Ticket:** Select it to escalate the tickets which meets the pre-selected conditions.

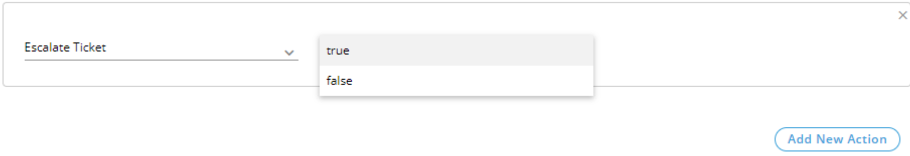


Figure: Escalate Ticket

Select any of the following operators.

- true: Select it to escalate the ticket.
- false: Select it to not escalate the ticket.

V. **Priority:** Select it to increase or decrease the priority of those tickets which meets the pre-selected conditions.

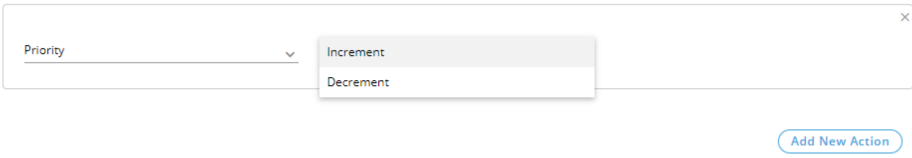


Figure: "Priority" Action

Select any of the following options in the drop-down menu.

- Increment: Select it to increase the priority of the ticket.
- Decrement: Select it to decrease the priority of the ticket.

VI. **Send Email To:** Select it to send an email to any recipient for those tickets which meets the pre-selected conditions.

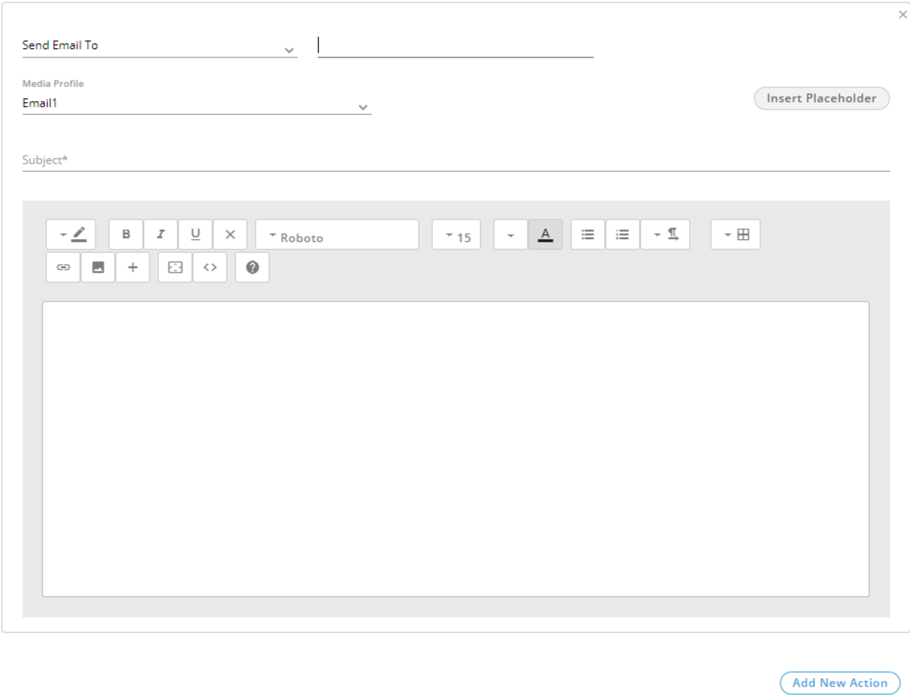


Figure: Send Email To Action

- Enter the email address of the recipient in the very first text field.
- Select the media profile in "Media Profile" drop-down menu.
- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.
- You can click "Insert Placeholders" button to add the placeholders in the message body.

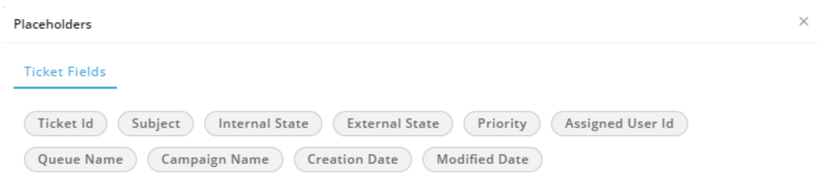


Figure: Placeholders

- Following is screenshot of such a message.

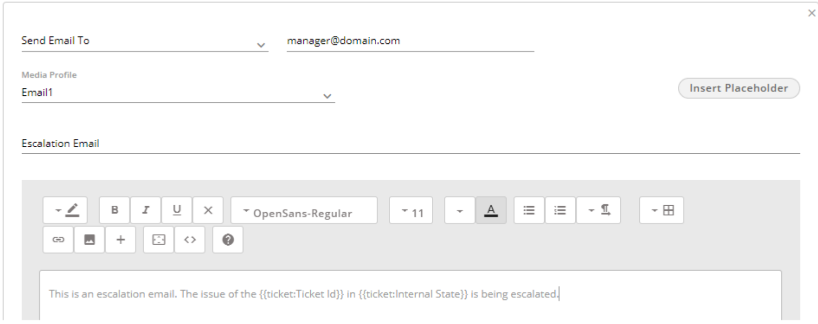


Figure: Sample Email

VII. **Send Email To Agent:** Select it to send an email to the selected agent for those tickets which meets the pre-selected conditions.

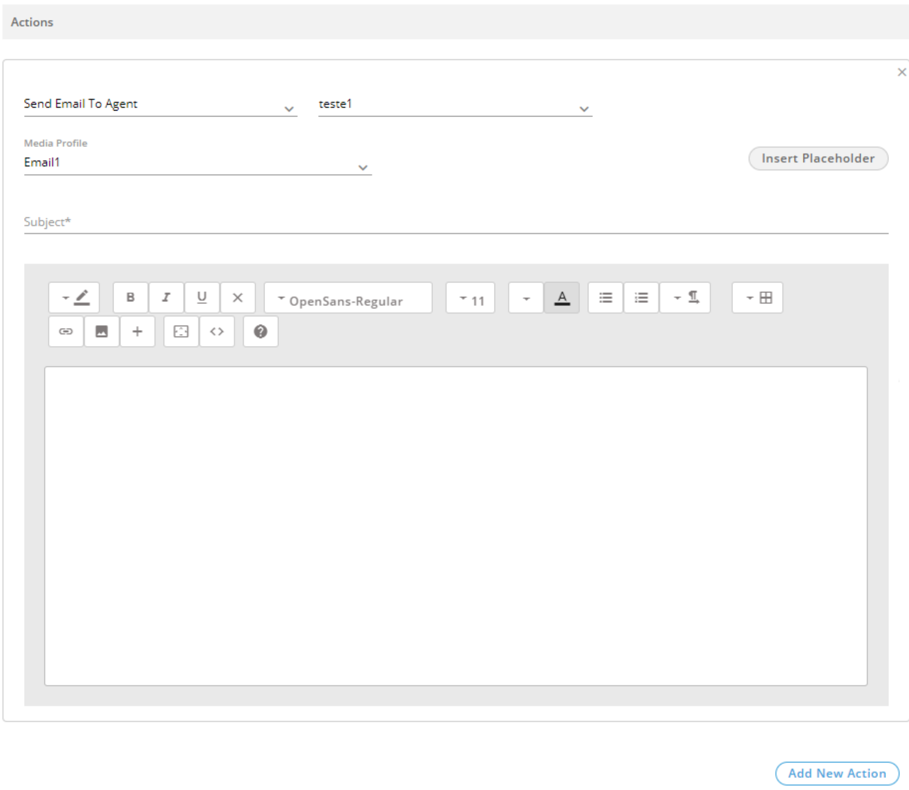


Figure: Send Email To Agent

- All the agents in the already selected campaign and process will be listed in the drop-down menu. Select an agent to whom you want to send the email.
- Select the media profile in "Media Profile" drop-down menu.

- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.
- You can click "Insert Placeholders" button to add the placeholders in the message body.

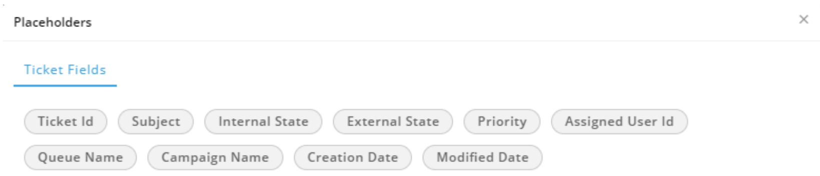


Figure: Placeholders

- Following is screenshot of such a message.

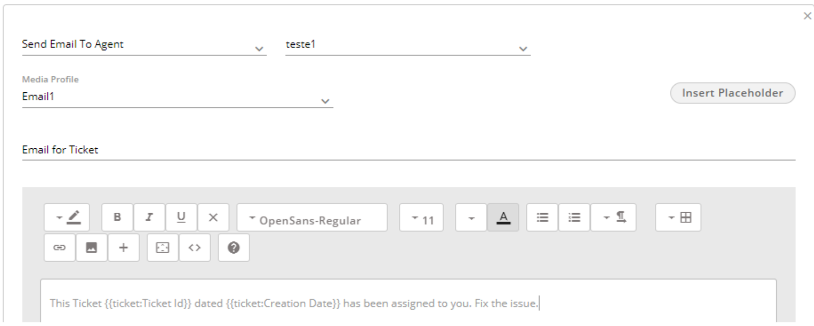


Figure: Sample Email

VIII. **Send Email To All Agents Assigned to Queue:** Select it to send an email to all agents assigned to the queue for those tickets which meets the pre-selected conditions.

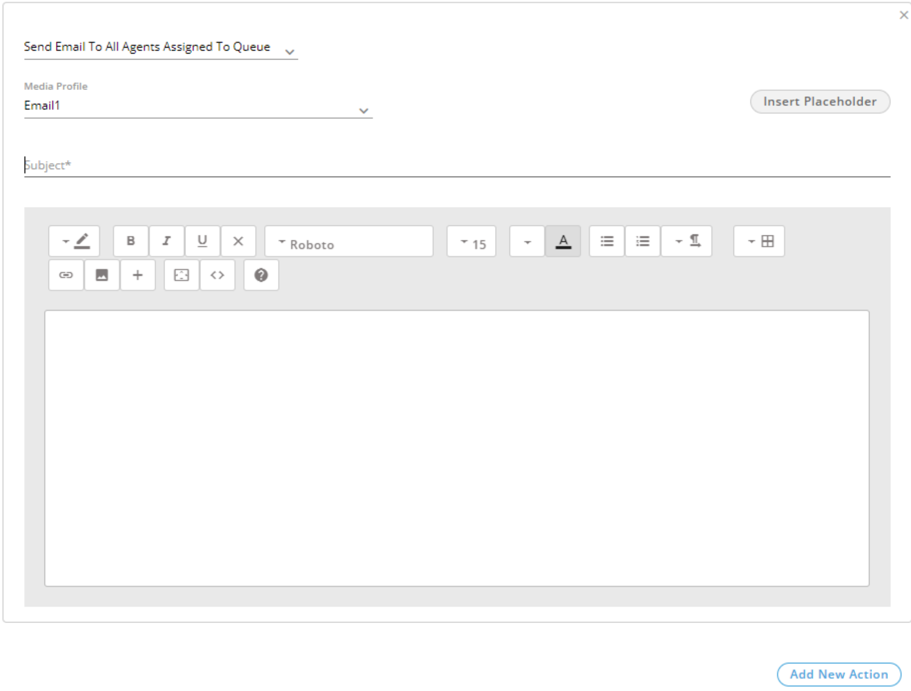


Figure: Send Email To All Agents Assgined to the Queue

- Select the media profile in "Media Profile" drop-down menu.
- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.
- You can click "Insert Placeholders" button to add the placeholders in the message body.

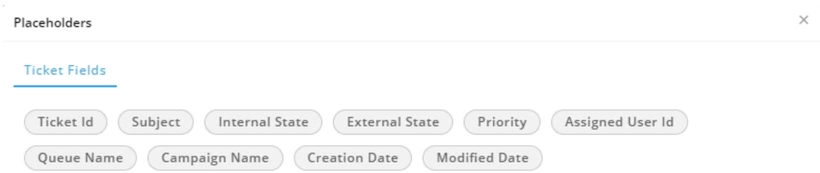


Figure: Placeholders

- Following is screenshot of such a message.

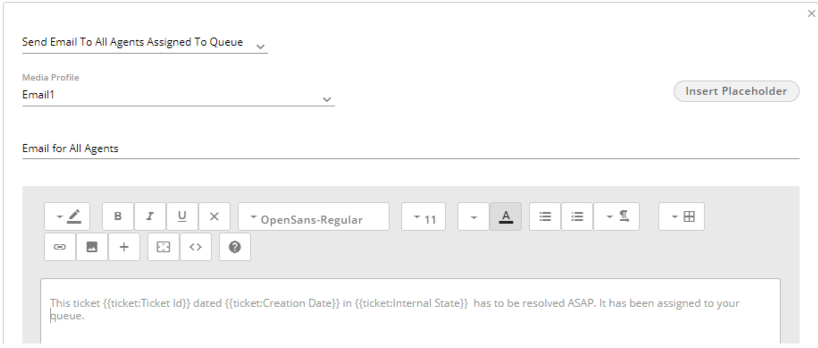


Figure: Sample Email

IX. **Send Email To Requester:** Select it to send an email to the requester for those tickets which meets the pre-selected conditions.

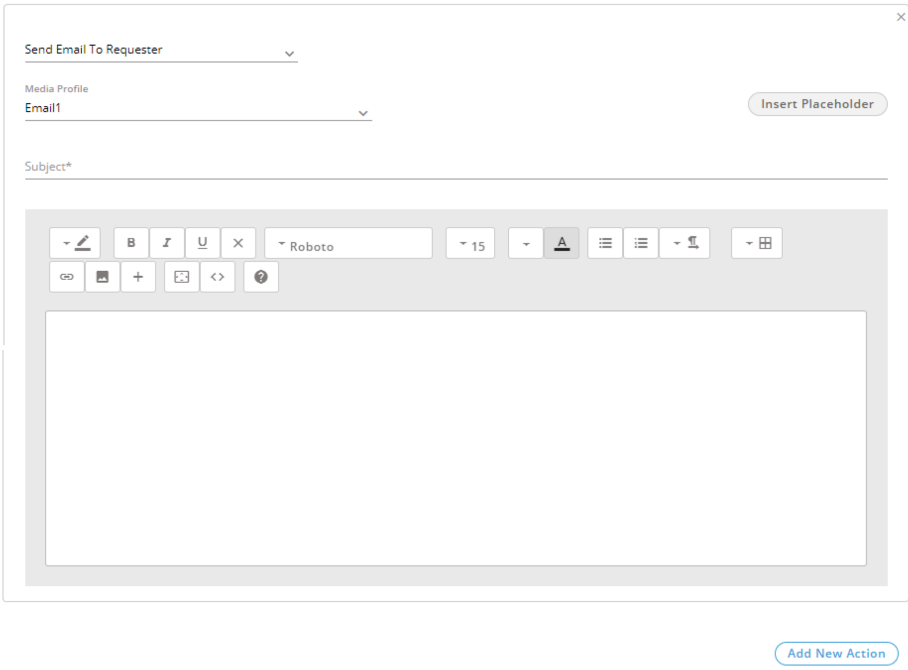


Figure: Send Email To Requester

- Select the media profile in "Media Profile" drop-down menu.
- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.

- You can click "Insert Placeholders" button to add the placeholders in the message body.

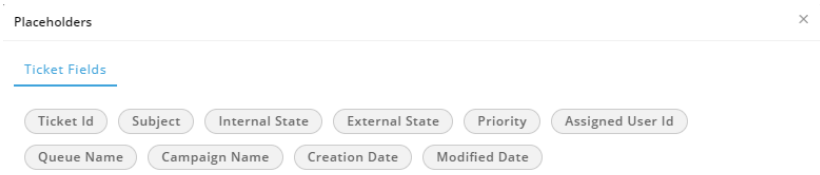


Figure: Placeholders

- Following is screenshot of such a message.

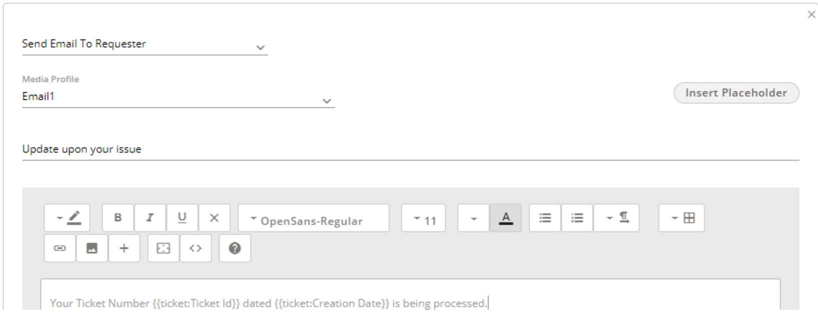


Figure: Sample Email

X. **Send Email To All Supervisors:** Select it to send an email to all supervisors for those tickets which meets the pre-selected conditions.

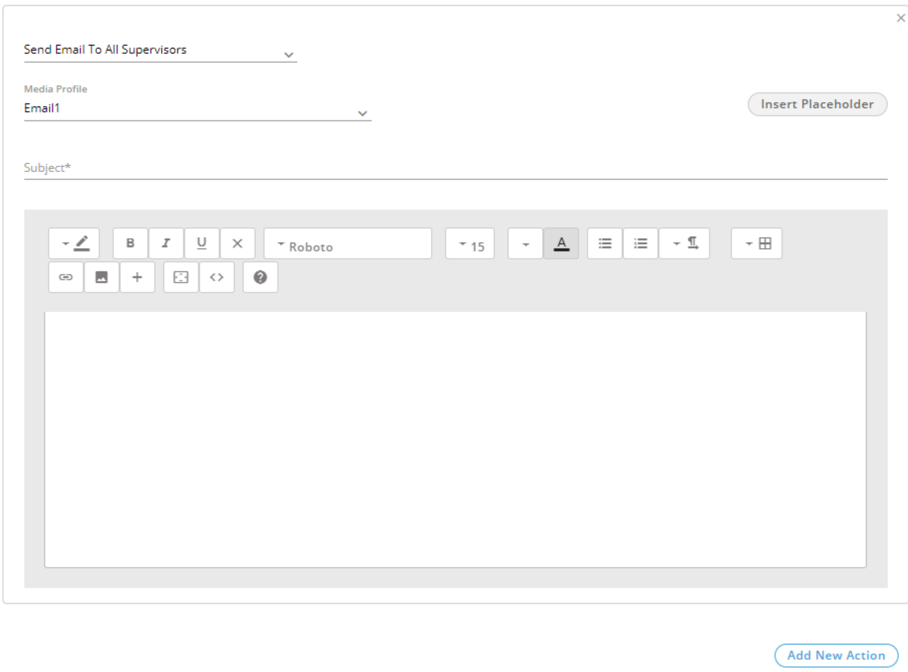


Figure: Send Email To All Supervisors

- Select the media profile in "Media Profile" drop-down menu.
- Provide a Subject in the subject text field.
- Write a message in the text area, which you can format using the provided tools.
- You can click "Insert Placeholders" button to add the placeholders in the message body.

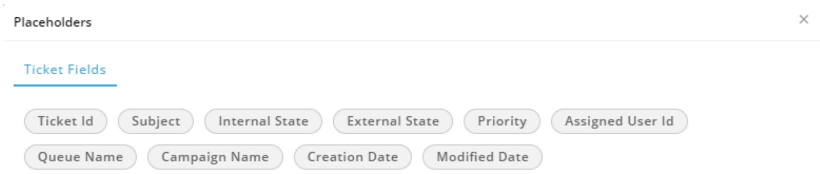


Figure: Placeholders

- Following is screenshot of such a message.

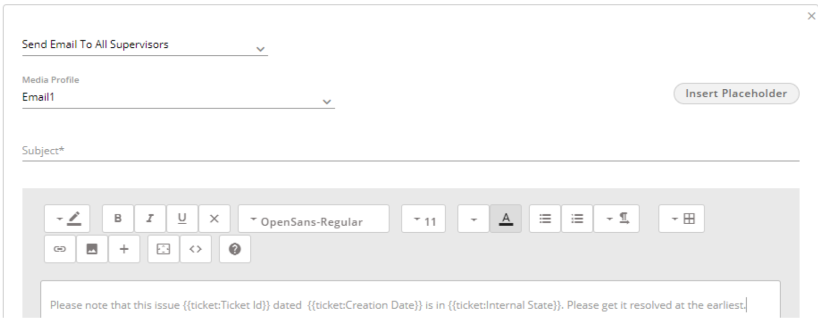


Figure: Sample Email

XI. **Set Custom Field:** Select it to set a custom field on those tickets who meet the pre-selected conditions.

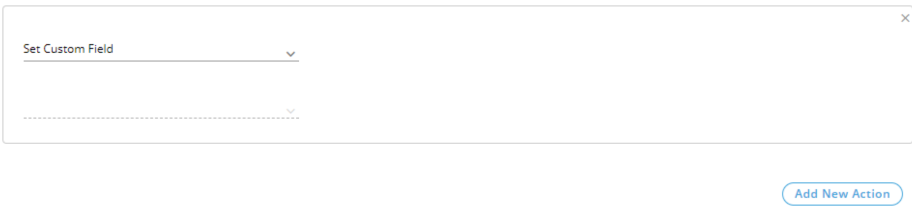


Figure: Custom Field Action

Select a custom field from the provided options.

XII. **Set Priority:** Select it to set the priority of those tickets which meets the pre-selected conditions.

Figure: "Set Priority" Action

Select any of the following options in the drop-down menu.

- Low
- Medium
- High

XIII. **Set Status:** Select it to set the status of those tickets which meets the pre-selected conditions.

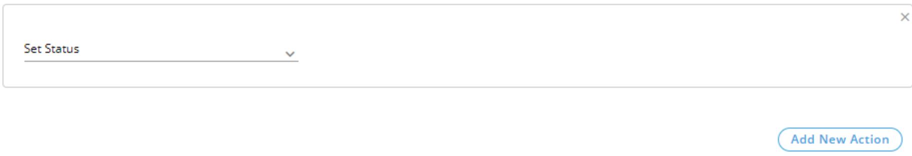


Figure: "Set Status" Action

XIV. **HTTP Action:** Select it to apply HTTP Action (also called Webhook) to trigger an external API to process those messages which meet the pre-selected conditions. Please refer to "HTTP Action" Page to know more about the same.

You can follow the same steps to add different kinds of multiple actions. They will run in sequential order from top to bottom.

7. Following is a sample screenshot containing an Timer-Based Rule with sample details.

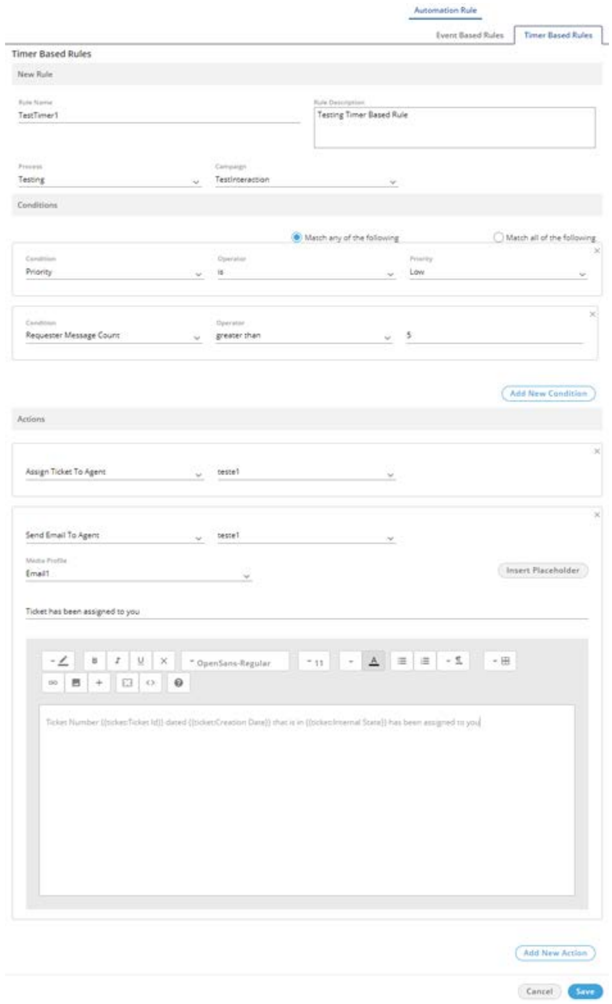


Figure: Timer-based Rule

8. Click "Save" to create the rule.You can create multiple rules for same or different campaigns to filter the same or different leads using these steps.

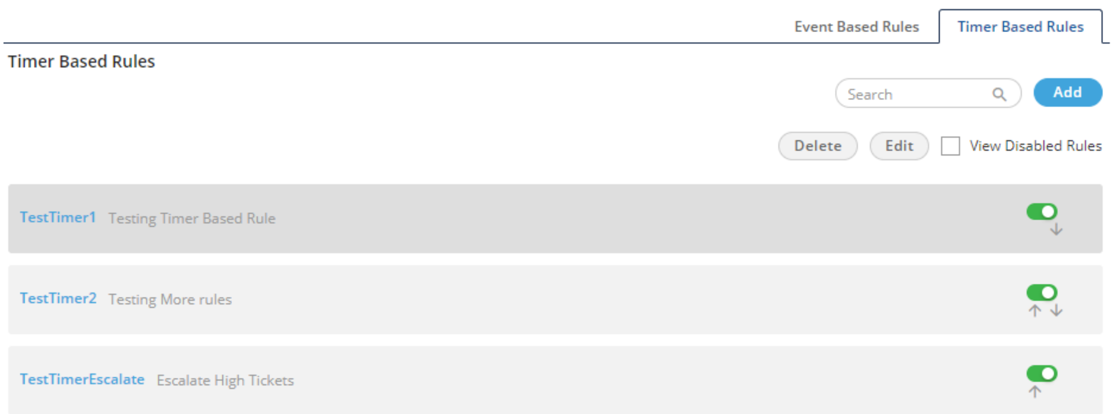


Figure: Added Multiple Timer-based Rules

8.15.7 Enable or Disable the Rule

You can disable the rules. The disabled rules will be hidden, but you can make them visible. You can also enable the disabled rules.

8.15.7.1 Disable a Rule

Click the toggle switch on a rule to disable it. It shows the following message.

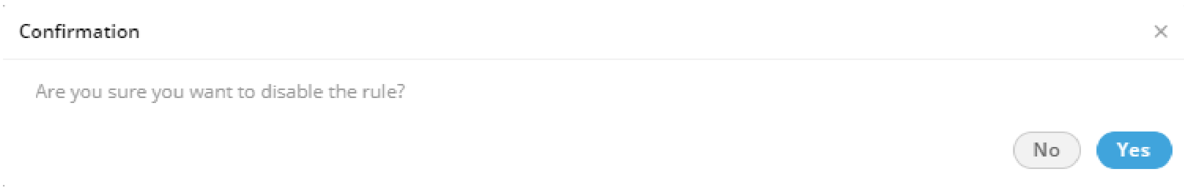


Figure: Asking to disable the rule

Click "Yes" to disable the selected rule. The disabled rule will not be applied in the already selected campaign. Here, it will be hidden now.

8.15.7.2 View Disabled Rules

Click to check "View Disabled Rules" box to view its details.

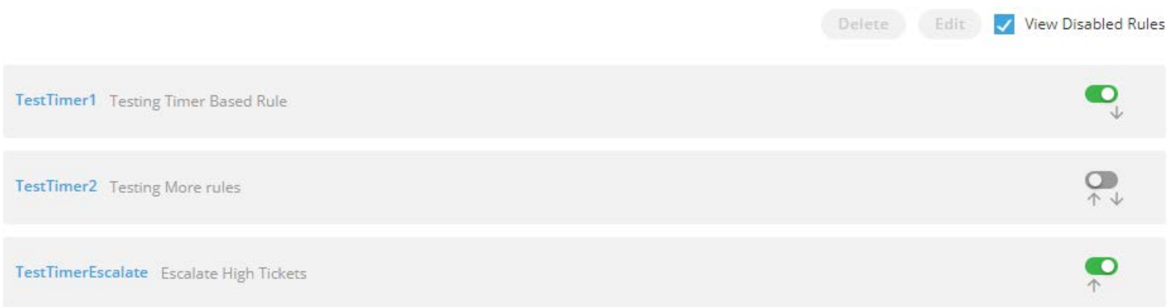


Figure: Displaying the Disabled Rule

8.15.7.3 Enable a Disabled Rule

To enable a disabled rule, click the gray toggle switch to enable it. The following message is displayed.

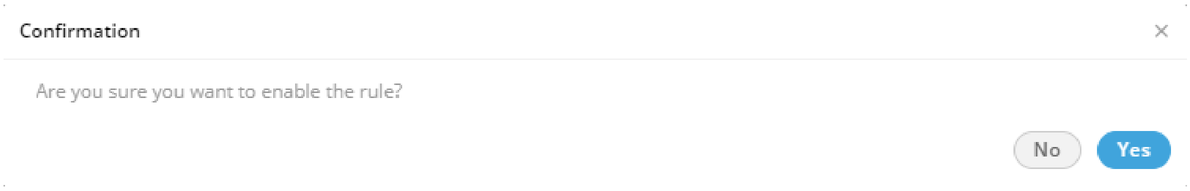


Figure: Asking to enable the rule

Click "Yes" to enable the selected rule. The enabled rule will be applied in the campaign, where it has been selected.

8.15.8 Edit a Timer-based Rule

Perform the following steps to edit a rule.

1. Click a rule to select it and click icon. It shows the following pop-up.

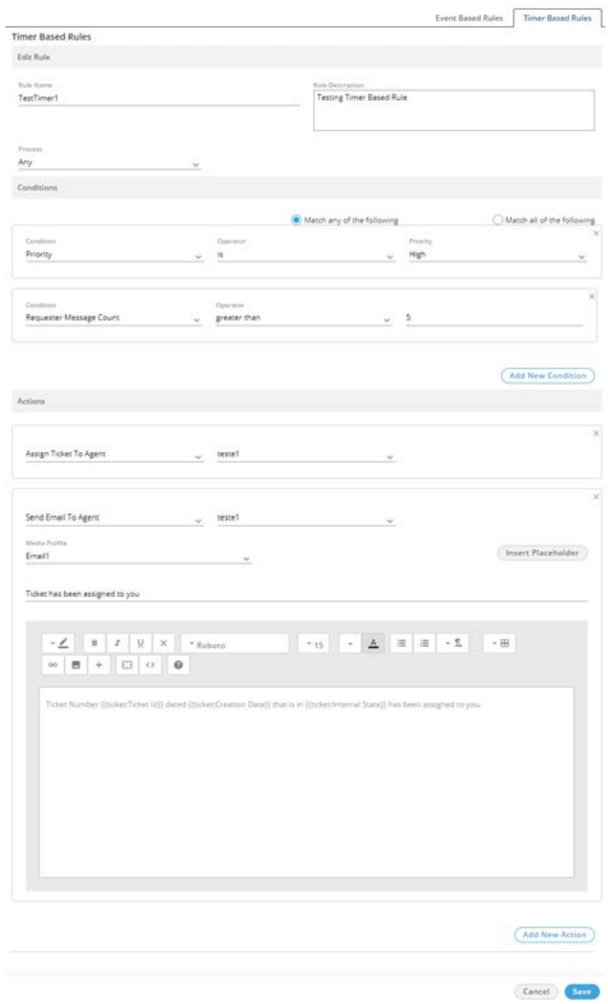


Figure: Edit a Timer-based Rule

2. You can make the following changes here.
   - Rule Name
   - Rule Description
   - Process
   - Campaign
   - Conditions
   - Actions

   You have to perform the same steps here, which you have performed while creating a Timer-based Rule.
3. Click "Save" to save the changes.

   Rather you can click "Cancel" to discard the changes.

8.15.9 Delete a Timer-based Rule

The Deleted Rule cannot be retrieved back. Also, the deleted rule will not be applicable in the selected campaign.

Perform the following steps to delete a rule.

1. Click to select a rule and click icon to remove it. The following warning message is displayed on the screen.

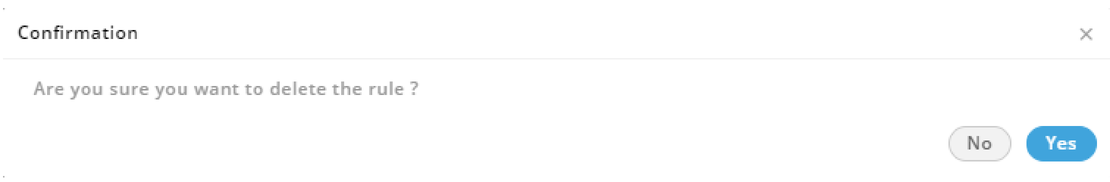


Figure: Warning before deleting a Timer-based Rule

2. Click "Yes" to delete the rule.

   Rather, you can click "No" to not delete the rule.

8.16 Ticket State

This tab lets you define the External States of Tickets in the default Internal States of Tickets.

Figure: Ticket State Tab

Following are the default internal states.

1. **<u>New</u>:** It specifies the new tickets.
2. **<u>Open</u>:** It specifies the open tickets.
3. **<u>Closed</u>:** It specifies the closed tickets.
4. **<u>Pending</u>:** It specifies the pending tickets.

Do not create the external states with the same names of internal states to avoid any issue.

8.16.1 Create an External State

Perform the following steps.

1. Click the checkbox of an internal state to select it. "Add" button will be activated in "External State" column.
2. Click "Add" button. It shows the following pop-up.

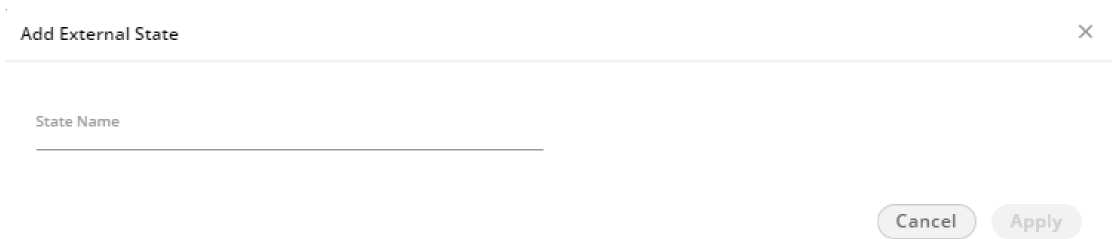


Figure: Create New External State

3. Provide a name for the new external state.
4. Click "Apply" to create it.

   Rather, you can click "Cancel" to not create it.

You can create multiple steps by performing these steps. Following screenshot shows some external states created in "New" Internal State.

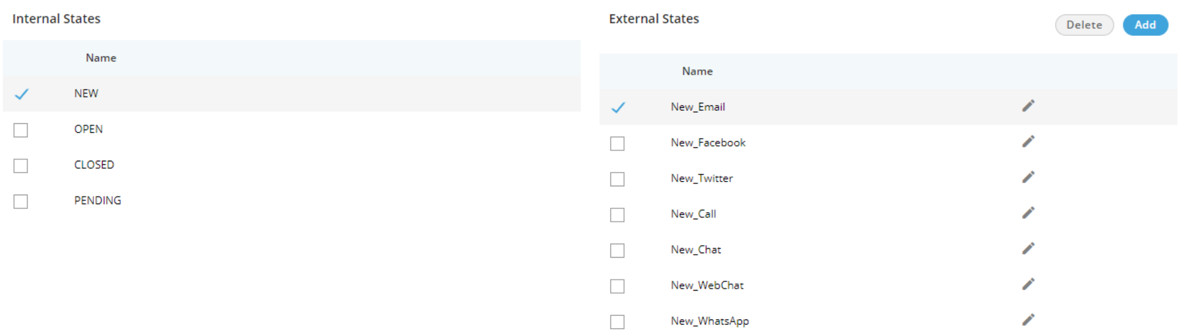


Figure: Created Multiple External States in "New"

8.16.2 Example

For an example, you can create the following external states in internal states.

- New
  - New_Chat
  - New_Call
  - New_Email
  - New_WebChat
  - New_Facebook
  - New_Twitter
  - New_WhatsApp
  - New_WhatsApp_For_Business
- Open
  - Open_Assigned

  - Open_Unassigned
  - Open_Reopened
- Pending
  - Pending_Customer_Have_to_do
- Closed
  - Resolved
  - Unresolved
  - Unresolved_Customer_Have_to_go
  - Unresolved_Customer_Have_to_do
  - Unresolved_Unsupported_Issue
  - Escalated

8.16.3 Edit an External State

Perform the following steps to edit an External State.

1. Check the box of an internal state. It lists all of its external states.
2. Click icon to edit it using the following pop-up.

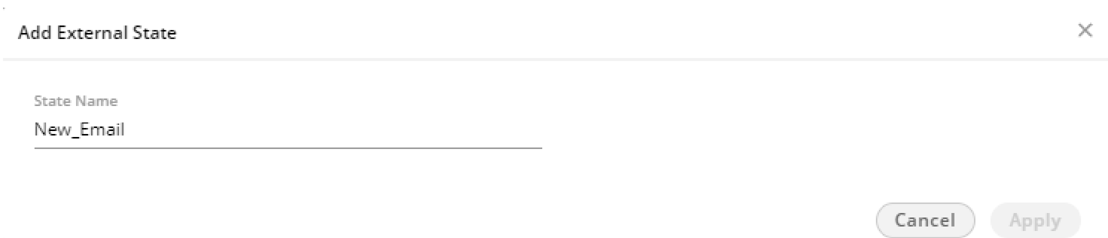


Figure: Edit External State

3. You can change the name of External State here.
4. Click "Apply" to make the changes.

   Rather, you can click "Cancel" to discard the changes.

8.16.4 Delete an External State

Perform the following steps to delete an external state.

1. Check the box of an internal state. It lists all of its external states.
2. Check the box of an external state and click "Delete" button. It shows a warning message before deleting the external state.

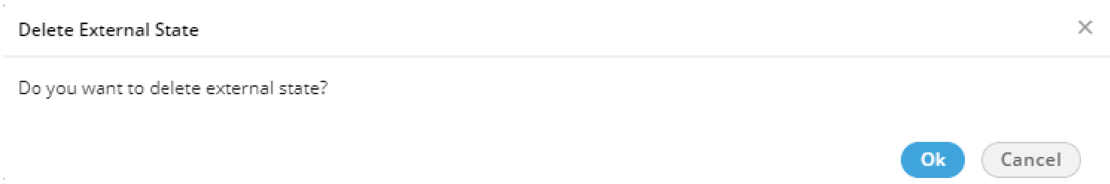


Figure: Warning before deleting an External State

3. Click "OK" to delete the external state.

   Rather, you can click "Cancel" to not delete it.

9. Call Manager

A call manager is a particular form of application server that manages the setup or connection of telephone calls. The call server will receive call setup request, determine the status of destination devices, check the authorization of users to originate and/or receive calls, and create and send the necessary messages to process the call requests.

9.1 Commands to Configure Call Manager

To use the Call Manager in Administrator Interface, you have to execute the following commands sequentially at the server operating system where Ameyo Server is installed.

psql -U postgres: Run it to enter the console of PostgreSQL.
\c ameyodb: Run it to enter the database.
insert into server_preference_store(context_type,context_id,key,value) values('contactCenter','1','callManagerSlot','<PORT>//<NAME_IP_OF_SERVER>/app/build');: Run it to enable the Call Manager in Administrator Interface.

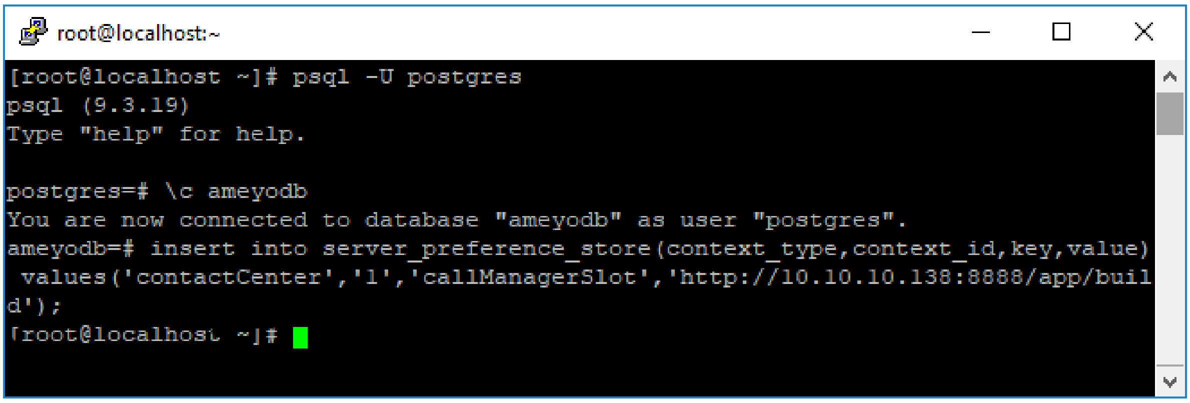


Figure: Commands to enable Call Manager

9.2 Call Manager Tab

After enabling the Call Manager, you can login to the Administrator Console to access its tab.

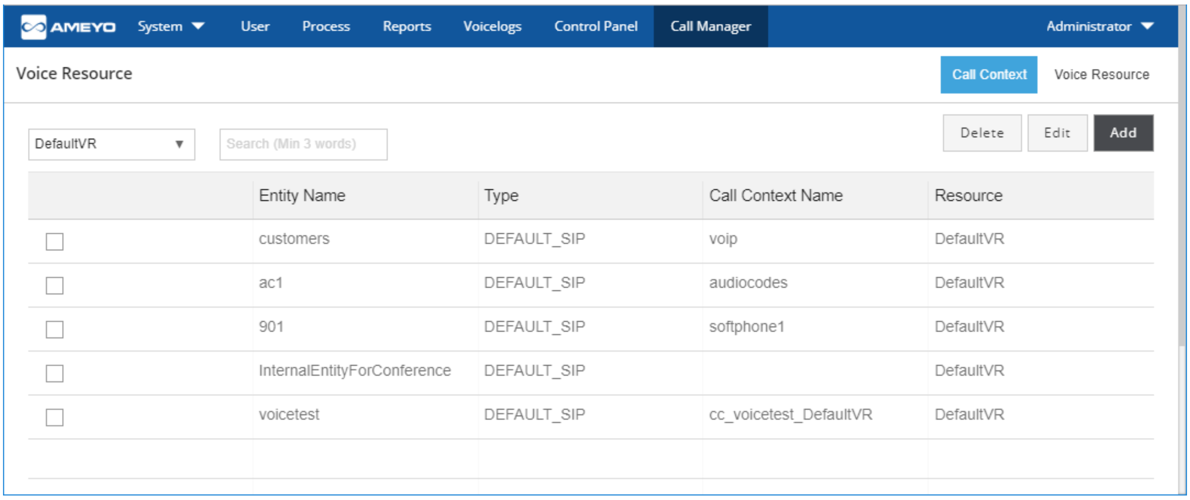


Figure: Call Manager Tab in Administrator Interface

Here, the Administrator have to add a voice resource in "Voice Resource" tab and then can add Call Contexts in "Call Context" Tab. These settings are made at the systems level. At campaign level, the administrator has to asign the call contexts.

9.2.1 Voice Resource Tab

This tab lets you configure the Voice Resources. These are asterisk call servers where we can configure the SIP/ VOIP minutes and PRI (Zap Trunk).

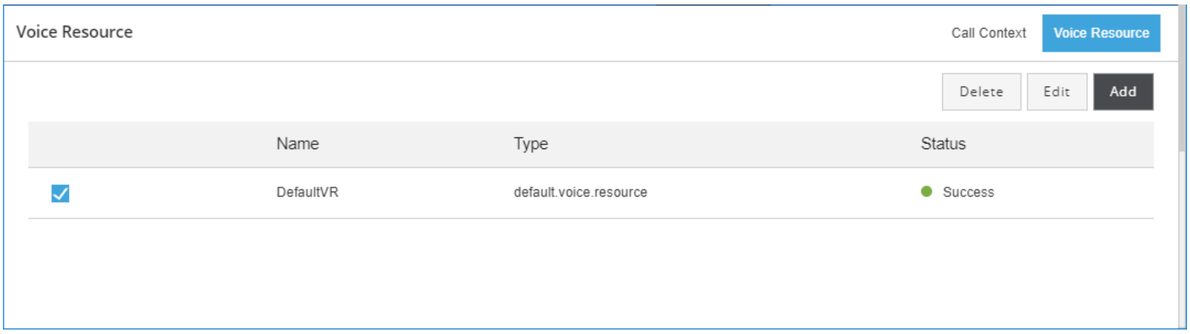


Figure: Voice Resource Tab

It is recommended to contact the Service Engineer for configuring a new Voice Resource for you.

Do not edit or delete "DefaultVR" or other voice resource being used in your environment.

9.2.2 Call Context Tab

Call context is basically the SIP channel that will be used by the agent to initiate the calls.

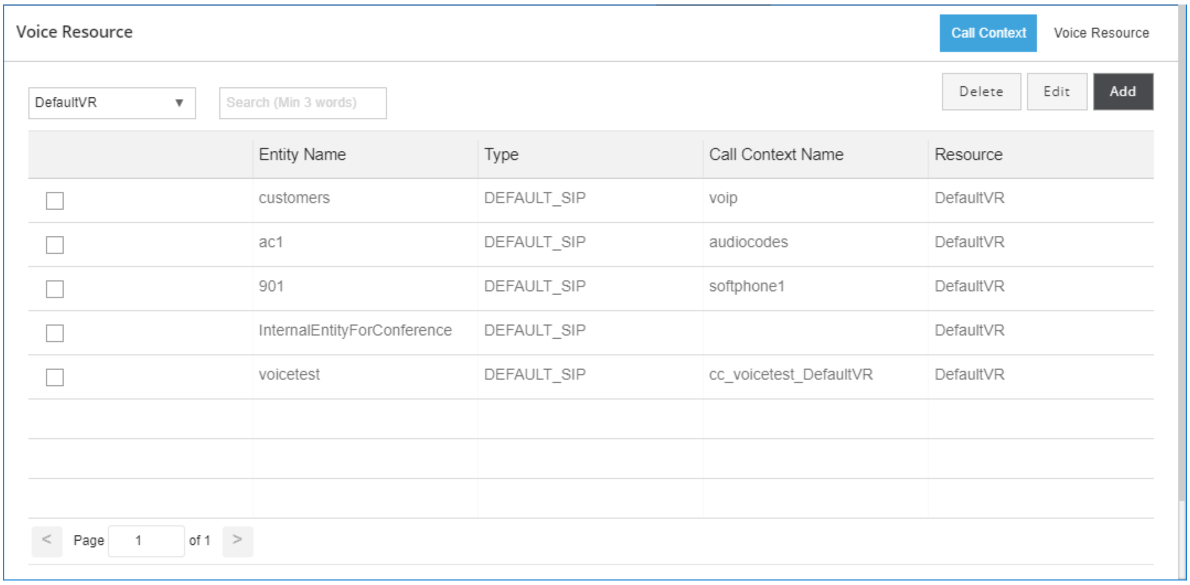


Figure: Call Context Tab

9.2.2.1 Add a Call Context

Perform the following steps to add a Call Context.

1. Click "Add" to add a call context using the following pop-up.

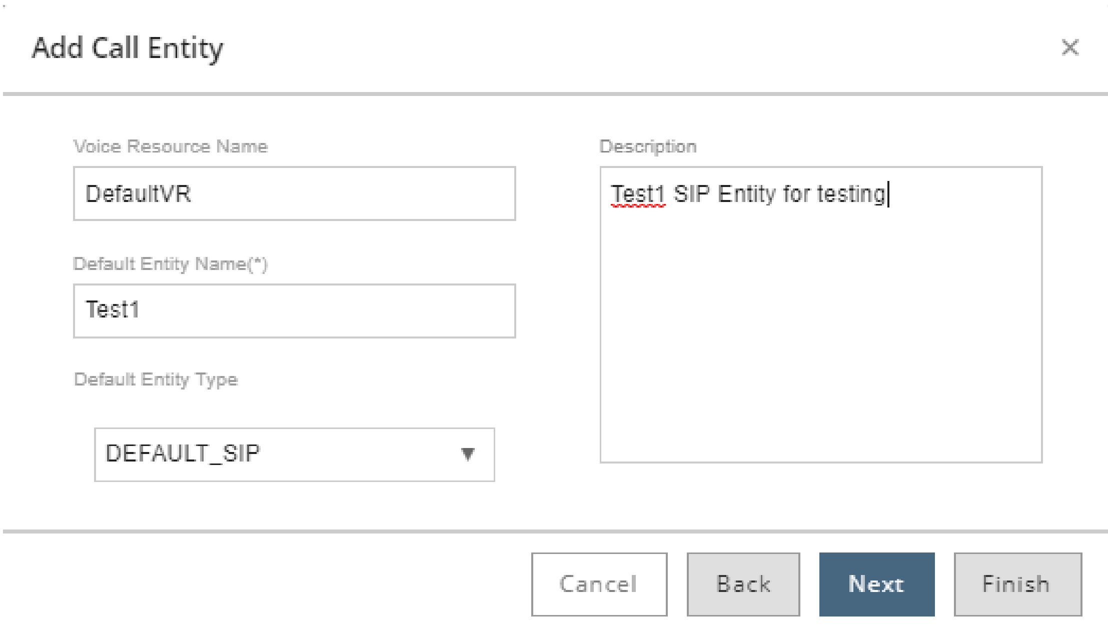


Figure: Pop-up to add a Call Context

2. In "Voice Resource Name" drop-down menu, select a voice resource. If no custom voice resource is added, keep "DefaultVR" selected in this menu.
3. Provide a name for the entity.
4. Select any of the following entity type.
    - DEFAULT_SIP
    - DEFAULT_ZAP_TRUNK

    We are selecting "DEFAULT_SIP" in this test case.
5. (Optional) Provide a description for the entity.
6. Click "Next" to proceed to the next page, where you have to provide the SIP details.

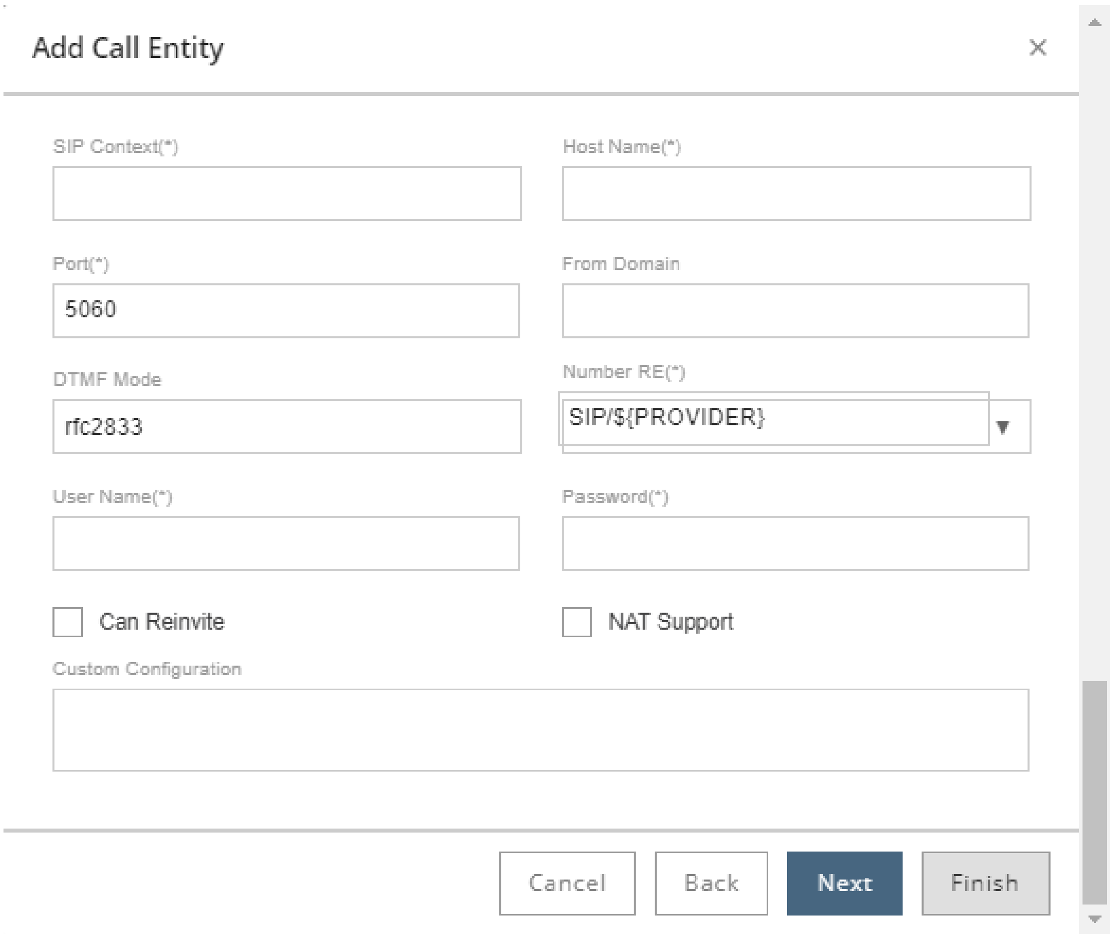


Figure: Add SIP Details to add a Call Context

7. Here, you have to provide the following inputs.

- **SIP Context:** The context of SIP entity.
- **Hostname:** The hostname or IP address of client host.
- **Port:** The communication port of SIP entity.
- **From Domain:** Set the domain name if client host is behind the NAT or Domain.
- **DTMF Mode:** DTMF mode supported by the SIP Entity.
- **Number RE:** Select any of the following number patterns to connect with receiver.
  - SIP/Provider: SIP/${PROVIDER}
  - SIP/Number@Provider: SIP/${NUMBER}@${PROVIDER}
- **Username:** The username of client. If client SIP entity require authentication.
- **Password:** Authentication password to be connect with SIP client.
- **Can Reinvite:** SIP Entity to allow SIP Reinvites. Select the checkbox to enable reinvite.
- **NAT Supported:** If NAT (Network Address Translation) is supported on the SIP Entity. Select the checkbox to enable reinvte.
- **Custom Configuration:** This field is used to configure specific parameters allowed only for particular SIP entity.

8. Click "Next" to proceed to the next page, where you have to provide more details to add a context.

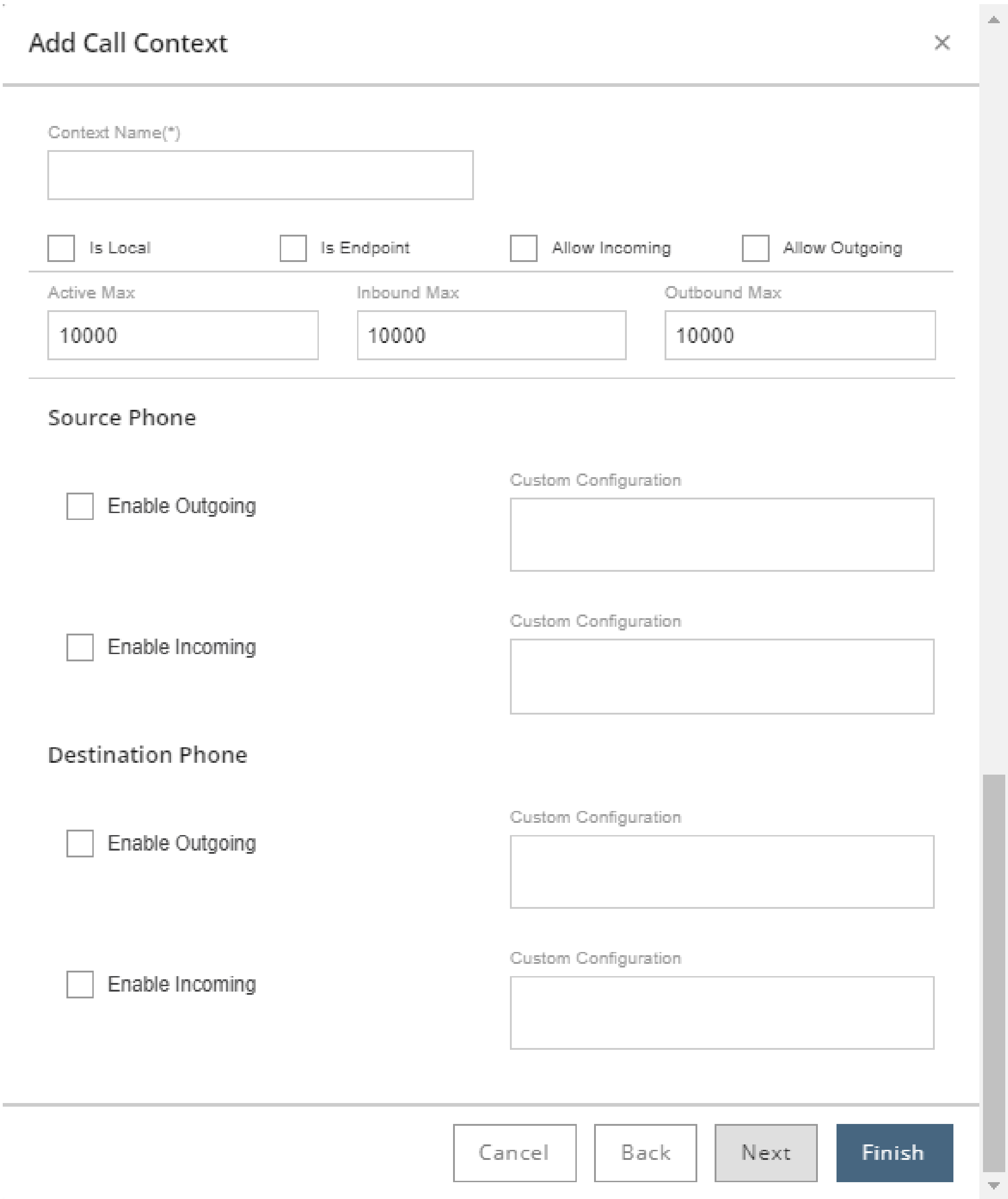


Figure: Add Call Context

9. Here, you have to provide the following details.
    - **Context Name:** Enter the context name.
    - **Is Local:** If this is checked then entity will be visible to agent.
    - **Is Endpoint:** No other agent can select that entity.

- **Allow Incoming:** Allow incoming calls using the selected call context. If not set, then the incoming calls on this call context would be automatically rejected.
- **Allow Outgoing:** Allow outgoing calls using the selected call context. If not set, then the request for outgoing calls on this call context would be rejected.
- **Active Max:** Maximum allowed active channels. It allows system not to maintain active calls beyond the configured range with this call context.
- **Inbound Max:** Maximum allowed incoming channels. It allows system not to receive incoming calls beyond the configured range with this call context.
- **Outbound Max:** Maximum allowed outgoing channels. It allows system not to dial outgoing calls beyond the configured range with this call context.
- **Source Phone:** You can enable outgoing and incoming for the Source Phone. You can also provide the custom configuration.
- **Destination Phone:** You can enable outgoing and incoming for the Destination Phone. You can also provide the custom configuration.

10. Click "Finish" to add the Call Context.

You can edit or delete a call context. However, do not delete a Call Context that is being used in any campaign for calls. The deleted Call Context cannot be restored.

10. Campaign Settings

10.1 Settings of All Campaigns

"Process Tab" in the Administrator Console contains the settings of all processes and campaigns. The Process Settings has been explained earlier.

The Campaign Settings is actuallly divided into the multiple tabs located in the top right side. The user interface, and the visibility and settings of these tabs actually depends upon the type of campaign you have selected in the Left Side Navigation Bar.

Following image is a Clickable Image Map. You can click the **Campaign Names** given on the left side to navigate through the settings of different campaign types.

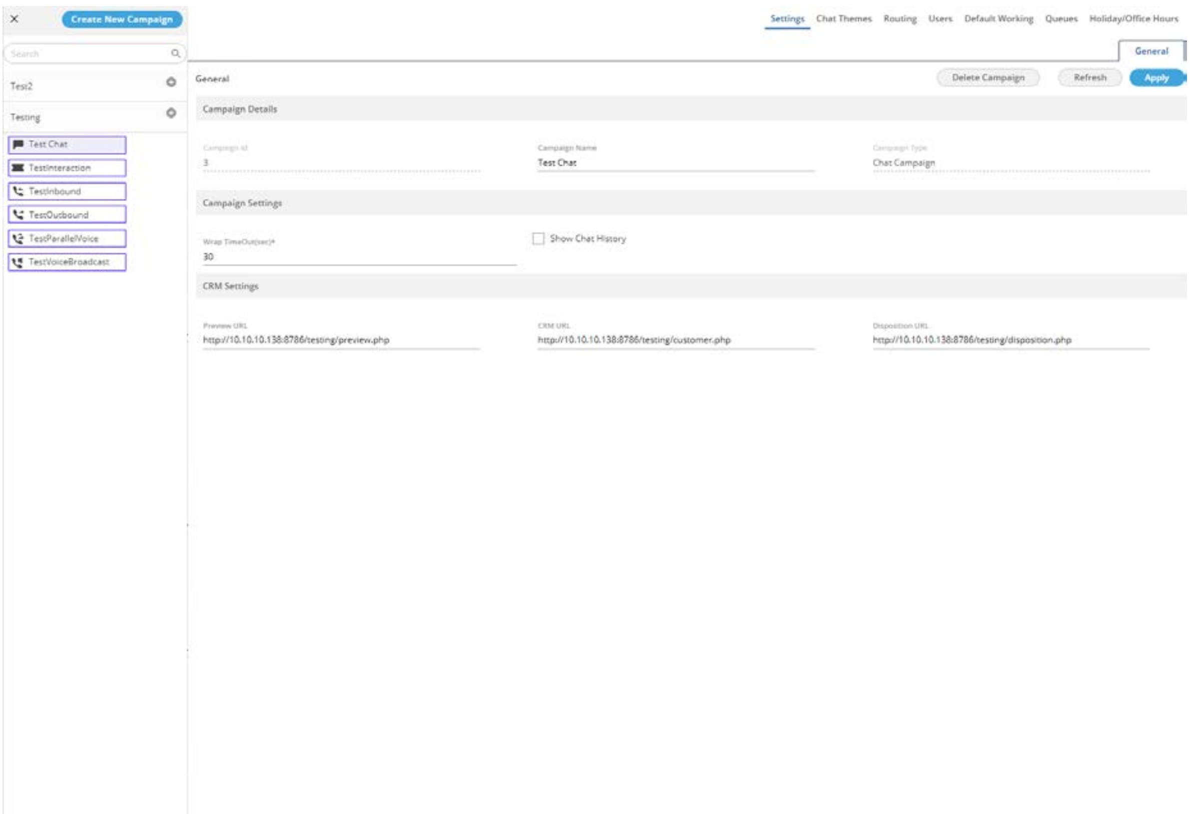


Figure: Settings for All Campaigns

Click the following links to know about the interface of this tab for each campaign type.

1. Chat Campaign Settings

10.2 Chat Campaign Settings

10.2.1 Chat Campaign Settings

In the left navigation bar of Proces Tab, you can select a Chat Campaign to view its settings.

The changes made in settings of one Chat Campaign will be applicable to that campaign itself. They will not be applicable on other similar (chat) and different (non-chat) campaigns.

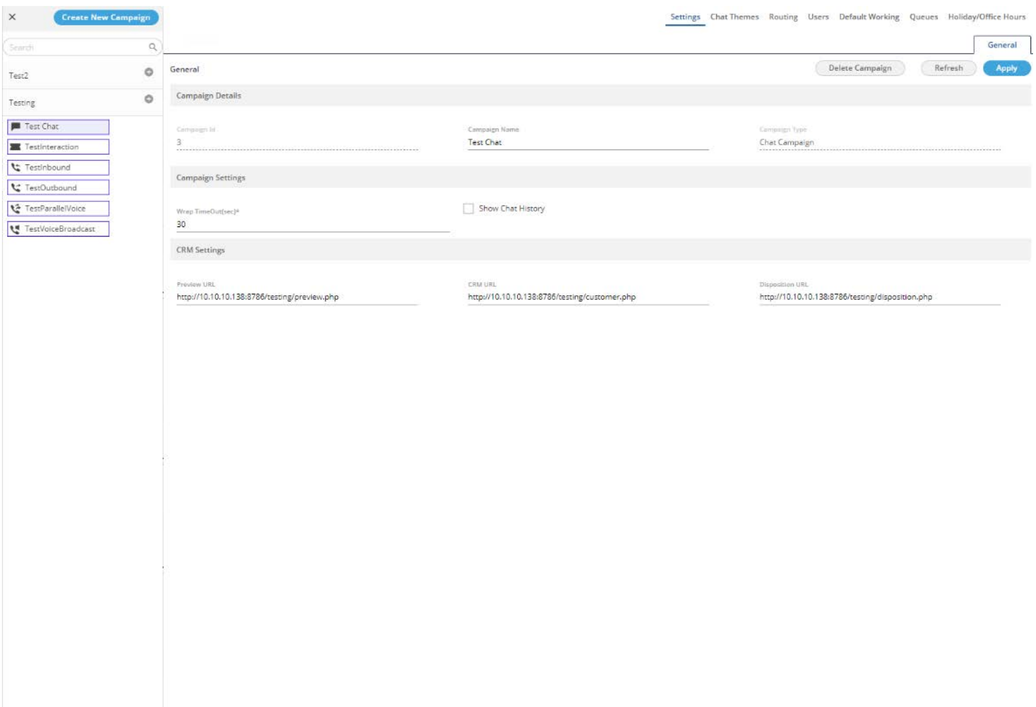


Figure: Settings of Chat Campaign

It contains the following tabs.

- Settings
- Queues
- Routing
- Chat Themes
- Users
- Default Working
- Holiday/Office Hours

10.2.1.1 Settings for Chat Campaign

This tab contains only "General Settings".

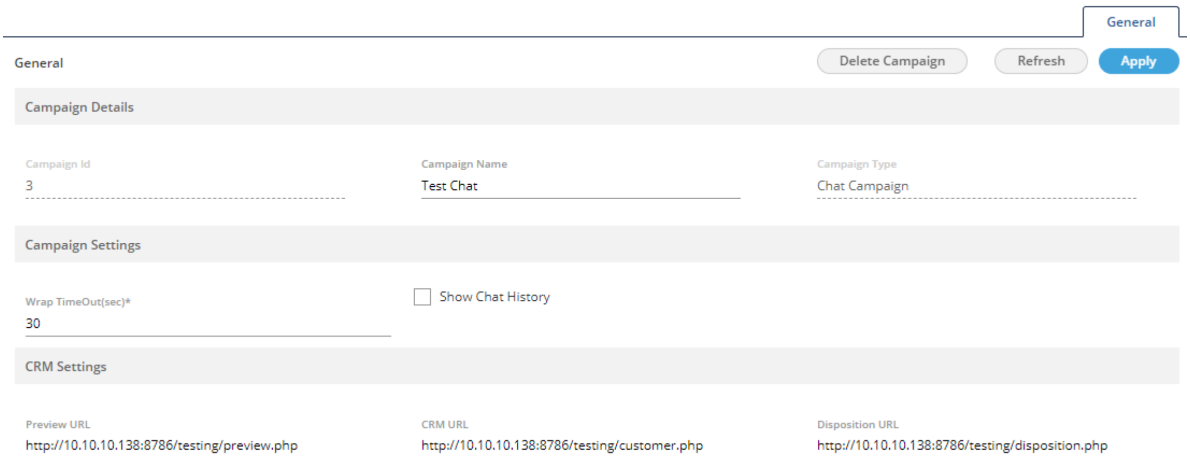


Figure: General Settings for Chat Campaign

Here, the General Settings are divided into the following sections.

- **Campaign Details:** These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.
- **Campaign Settings:** It contains the same settings "Wrap TimeOut(sec)", which you have provided while creating this campaign. You can change it here.
- **Show Chat History:** Check this box to show the history of chats

- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- Click here to know more about the Campaign Details and CRM Settings for this campaign.

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

10.2.1.2 Chat Themes

This tab has already been explained in the Process Settings. Know more...

10.2.1.3 Holiday/Office Hours

This tab has already been explained in "System Configuration". Know more...

10.2.1.4 Other Settings

Remaining Settings of a Chat Campaign are explained in the following pages. Click the link to know more about them.

1. **Queue Management in Campaign**
2. **Routing Management in Campaign**
3. **User Management in Campaign**
4. **Default Working in Campaign**

10.2.2 Queue Management in Campaign

Queues Tab in the Campaign Settings allows you to create and manage the queues.

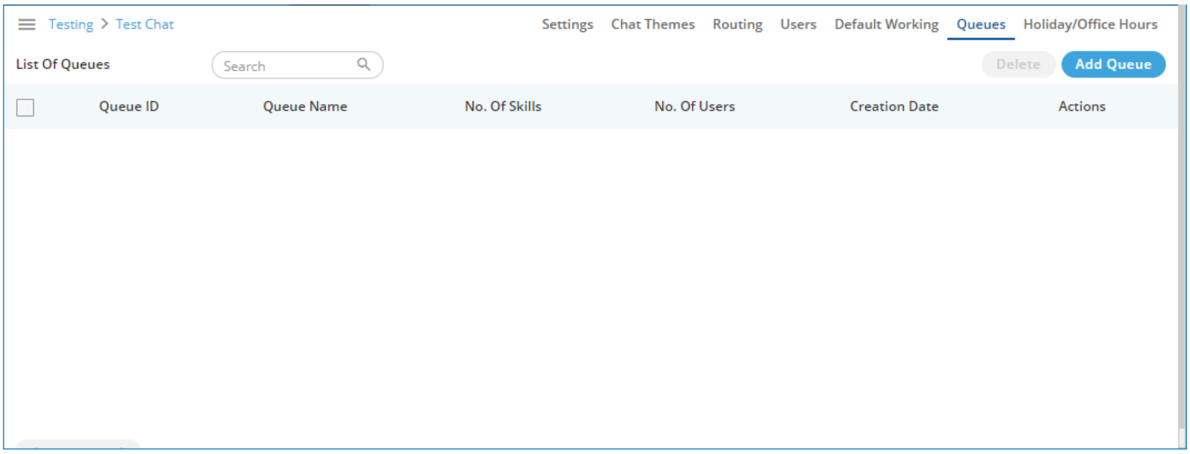


Figure: Queues Tab

10.2.2.1 Create Queue

Perform the following steps to create a queue.

1. Click "Add Queue" button on the top right corner to create a queue. It shows the following page.

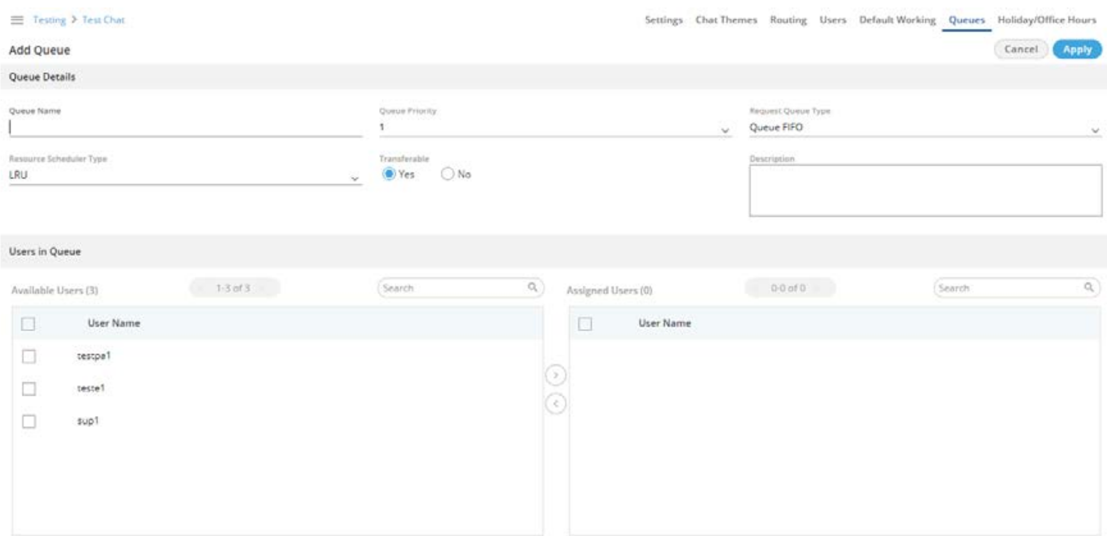


Figure: Create Queue

2. Provide a name for the queue.
3. Select a value for the queue priority. This value will be used for "Priority" type queues.

4. **Request Queue Type:** It lets you define which customer customer wil be served first if more than one customers are waiting in the queue.
    A. **Queue FIFO:** FIFO stands for First In First Out. If request queue type is FIFO and two customers are waiting in queue for agent, the customer who is first to reach in the queue would be connected first to the available agent.
    B. **Queue Priority:** Nodeflow can be used to decide the priority of any customer. If two customers (customer1 with priority 1 and customer2 with priority 2) are waiting in the queue and customer1 is the first to reach in queue, then customer2 who have higher priority will be connected to the agent first.
    Other Example: The priority can be applied to the queue also. If customer1 (who reached earlier) is waiting in Queue1 having priority 1 and customer2 (who reached late) is waiting in the Queue2 having priority 2, and if only one agent is serving both queues, then agent will be connected to Customer2 first because of the higher priority of its Queue2.
5. **Resource Scheduler Type:** It will let you decide which agent would be connected to the customer when two agents are available to take the chat or call. Select any of the following options.
    A. **LRU:** It stands for "Least Recently User". As per this algorithm, the communication (chat or call) will be connected to the agent who has been used very least recently.
    B. **Multiple Extension:** Select it if the agents have mutliple extensions and they are supposed to attend multiple commumnications (chat or call) simultaneously. One agent can be connected to two customers in the same queue.
    C. **Multimedia Based:** Select it only if the agents have to take chat and Inbound calls simultaneously.
    D. **Skill Based:**Select it to connect the communication (chat or call) to that agent who have more skill level than others.

6. **<u>Transferable</u>:** Select it to transfer the communication call or chat from this new queue to another queue.
7. Provide a description for the queue.
8. **<u>Assign Users in Queue</u>:** Select the users in "Available Users" section and click icon.

To unassign a user, select the users in "Assigned Users" and click icon.

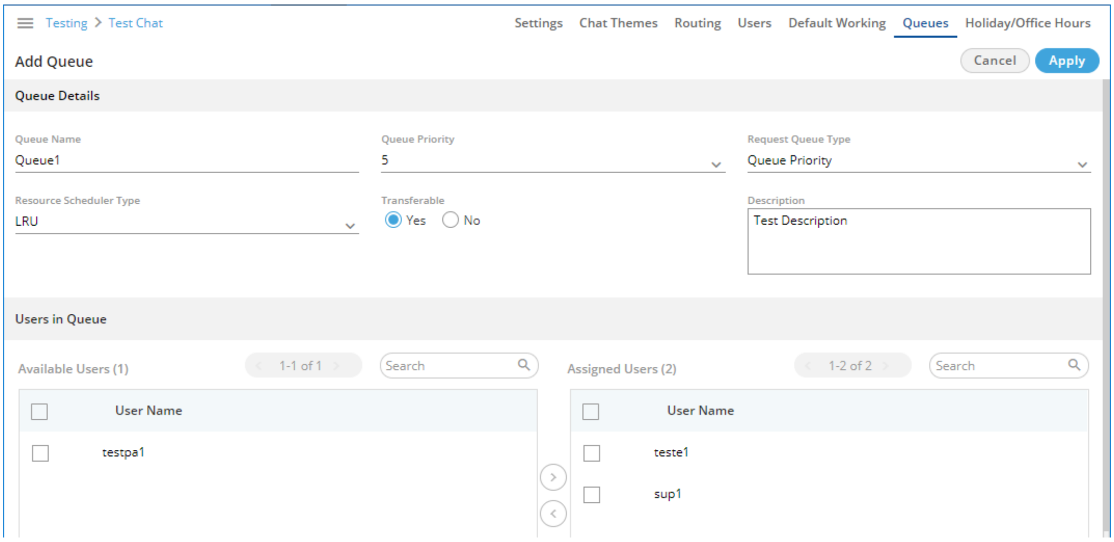


Figure: Sample Details to create a Queue

9. Click "Apply" to create the queue.

   Rather, you can click "Cancel" to discard the changes.

You can create multiple queues using these steps.

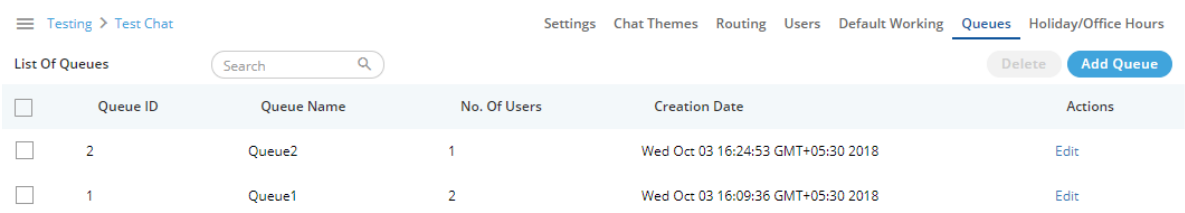


Figure: List of Queues

You can edit or delete a queue.

10.2.3 Routing Management in Campaign

Routing Tab lets you create the nodeflows to manage the routing of communication (chat, call, or email) in a campaign.

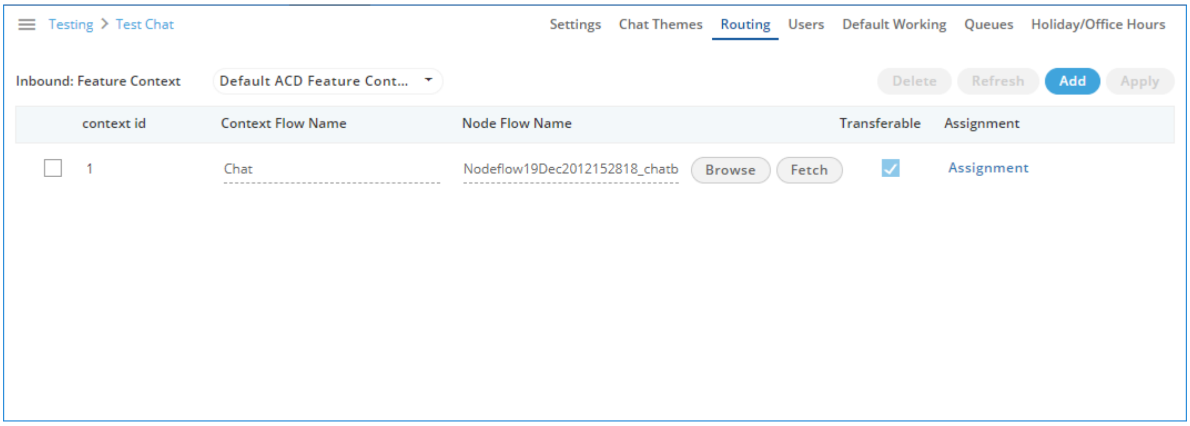


Figure: Routing Management

10.2.3.1 Create a Node Flow for Routing

Perform the following steps to create a nodeflow.

1. Click "Add" button to create a nodefflow. It shows a new row in the white area just below the column header.

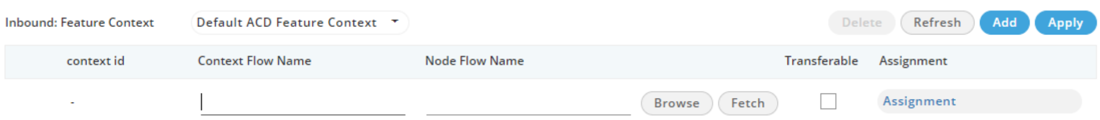


Figure: Add Context Flow

2. Provide a name for the context flow.
3. In "Node Flow Name" column, you have to upload either a .nodeflow or .anfx flow.

Service Engineer will provide you the required nodeflow files.

Click "Browse" to open a nodeflow file. Select the location where the file stored. Select the required file and click "Open".

4. Check "Transferable" if you want to transfer the call from this nodeflow to another nodeflow.
5. Click "Apply" to add the nodeflow.

10.2.3.2 Assign Nodeflow to a Queue

Perform the following steps to assign a nodeflow to a queue in the campaign.

1. Check the box to select a queue.
2. Click "Assignment" to assign this nodeflow to a queue. It shows the following pop-up.

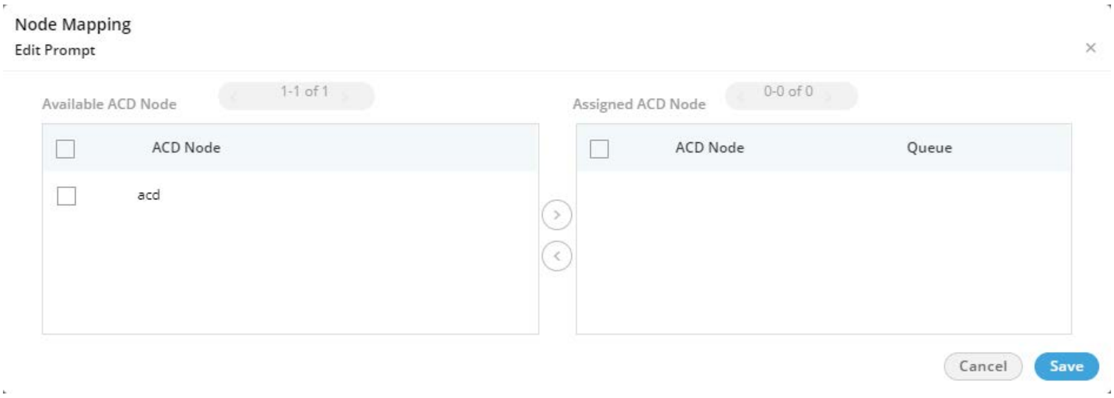


Figure: Assign Nodeflow to a Queue

3. Select "ACD" node in "Available ACD Node" section, and click  icon.
4. Select the nodeflow in "Assigned ACD Node" section.
5. In "Queue" drop-down menu, select the queue to which you want to assign this ndoeflow.
6. Click "Save" to assign the nodeflow to the selected queue. It takes you back to "Routing" Tab.

You can perform the same steps to create the nodeflow and to assign it to a queue.

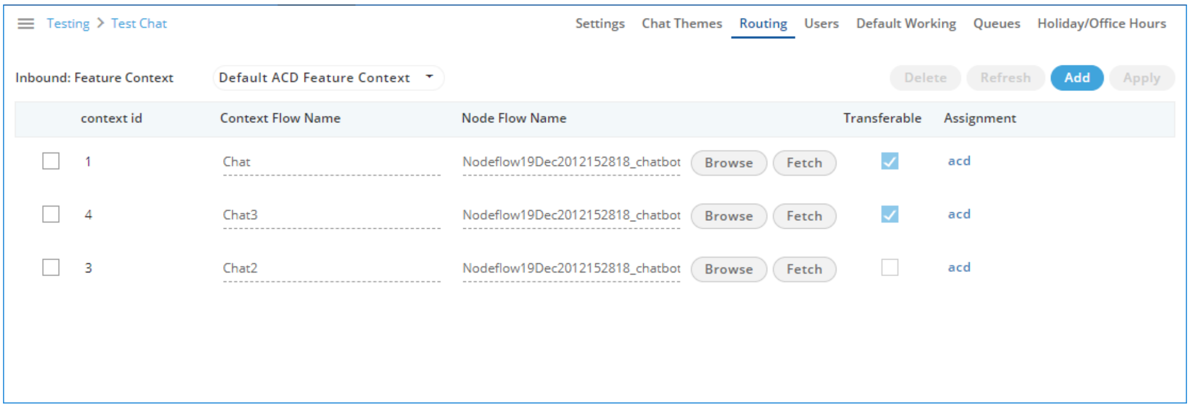


Figure: Added Nodeflows

You can fetch a nodeflow and download it as a file on the disk, assign or unassign it to a queue, and delete the nodeflow.

10.2.4 User Management in Campaign

You have assigned the users in the campaign while creating it. Now, you can use "Users" tab to unassign and assign the users in the campaign.

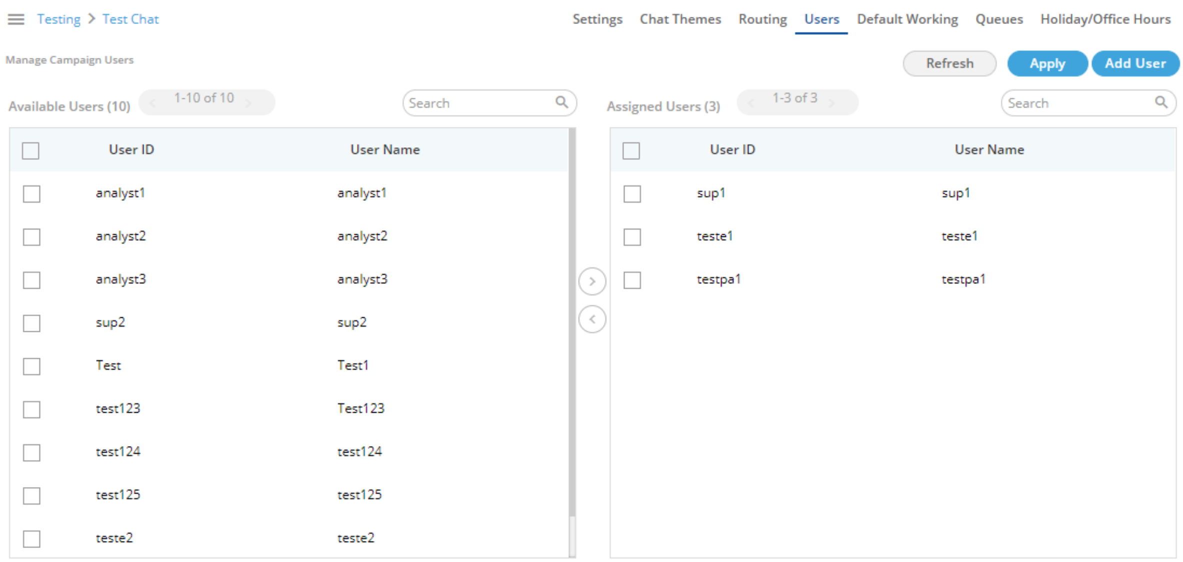


Figure: User Management

You have to perform the same steps here, which you have performed to assign or unassign users while creating the campaign.

Perform the following steps.

1. Select the users in "Available Users" section. You can click the checkbox given on top to select all users.

   You can also search for the user names in the provided search box.

2. Click icon to add the selected users.

   To unassign the users, select the users in "Assigned "Users" section and icon.

10.2.5 Configure Default Working in Campaign

If a user is assigned to multiple campaigns, then it has to select the campaigns in which it wants to login during its logon to the system.

"Default Working" Tab in a Campaign lets you select the Default Campaign for the selected users. These users will not be prompted to select the campaign and will be logged on to this campaign by default.

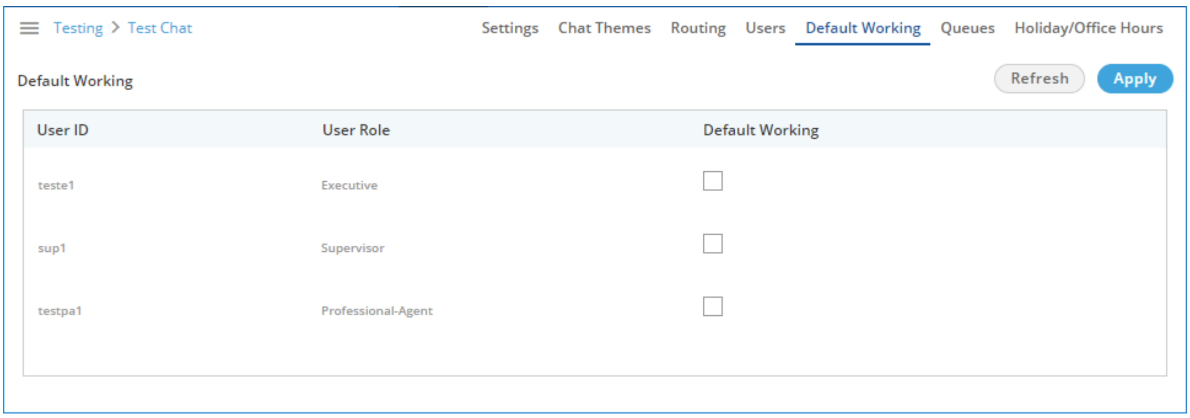


Figure: Set Default Working

You just have to select "Default Working" checkboxes for the users which you want to logon in this campaign by default. Click "Apply" to apply this change.

10.3 Interaction Campaign Settings

In the left navigation bar of Proces Tab, you can select an Interaction Campaign to view its settings.

The changes made in settings of one Interaction Campaign will be applicable to that campaign itself. They will not be applicable on other similar (interaction) and different (non-interaction) campaigns.

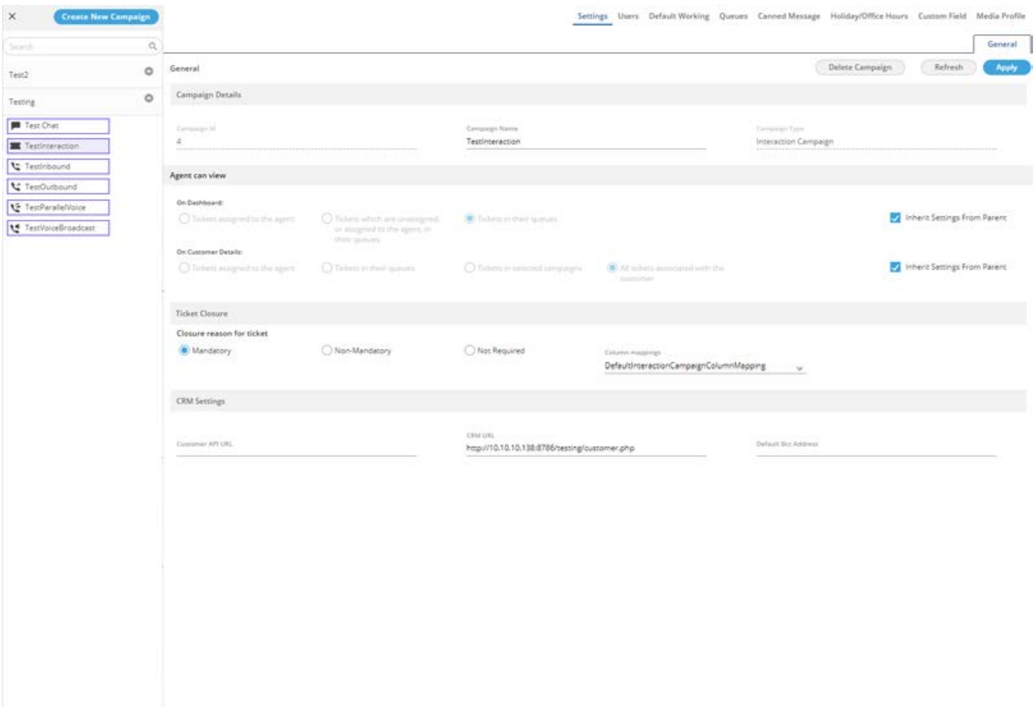


Figure: Settings of Interaction Campaign

It contains the following tabs.

- Settings ⟶ General
- Queues
- Users

- Default Working
- Holiday/Office Hours
- Canned Messages
- Custom Field
- Media Profile

10.3.1 Settings for Interaction Campaign

This tab contains only "General Settings".

Here, the General Settings are divided into the following sections.

- **Campaign Details:** These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.
- **Campaign Settings:** It contains the following settings.
  - **Agent can view:** This settings lets you allow the agents to view the tickets of others or not.
    - On Dashboard: It lets you to allow or disallow the agents to view the tickets of other agents on the dasboard. You can check "Inherit from Parent" to inherit this settings from the parent. If you uncheck it, then you can select any of the fullowing values for this campaign.
      - Tickets assigned to the agent: Select it to let the agent view only those tickets that are assigned to the agent.
      - Tickets assigned to the agent and all unassigned tickets: Select it to let the agent view all unassigned tickets and those tickets that are assigned to the agent.
      - All Tickets: Select it to let the agent view all tickets such as assigned tickets to the agent itself, unassigned tickets, and tickets assigned to other agents.

- On Customer Details: It lets you to allow or disallow the agents to view the tickets of other agents on the customer details. You can check "Inherit from Parent" to inherit this settings from the parent. If you uncheck it, then you can select any of the fullowing values for this campaign.
  - Tickets assigned to the agent: Select it to let the agent view only those tickets that are assigned to the agent.
  - Tickets assigned to the agent and all unassigned tickets: Select it to let the agent view all unassigned tickets and those tickets that are assigned to the agent.
  - All Tickets: Select it to let the agent view all tickets such as assigned tickets to the agent itself, unassigned tickets, and tickets assigned to other agents.

- **Closure Reason of Tickets:** It is a new settings named "Closure Reason for ticket", which allows the Administrator to specify whether the users has to provide the closure reason while closing the ticket or not. It contains the fullowing values.
  - Mandatory: Select it to make it mandatory for the users to provide a closure reason while closing the ticket.
  - Non-Mandatory: Select it to make it optional for the users to provide a closure reason while closing the ticket. The agent can skip the step to provide the closure reason and close the ticket directly.
  - Not Required: Select it to make it unnecessary (not required at all) for the users to provide a closure reason while closing the ticket. The option to ask for a closure reason will not appear at all while closing any ticket.
- **Column Mappings:** Selct a different column mapping here.

-
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- Click here to know more about the Campaign Details and CRM Settings for this campaign.
- **Default BCC Address:** You can provide an email address to which all emails will be sent through BCC field.

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

10.3.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the Chat Campaign Settings. Know more...

10.3.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the Chat Campaign Settings. Know more...

10.3.4 Default Working

Here, you can select the users who will be logged in to this campaign, by default, and will not receive the prompt to select the campaign. This tab has already been explained in the Chat Campaign Settings. Know more...

10.3.5 Holiday/Office Hours

Here, you can define the holidays, office hours, and non-working hours for this campaign. This tab has already been explained in "System Configuration". Know more...

10.3.6 Canned Messages

This Tab lets you assign and unassign the canned messages to this campaign. You have created the canned messages at the System Level and the same will be shown here. Refer to

"Canned Messages" in System Configuration to know the steps to create the canned messages.

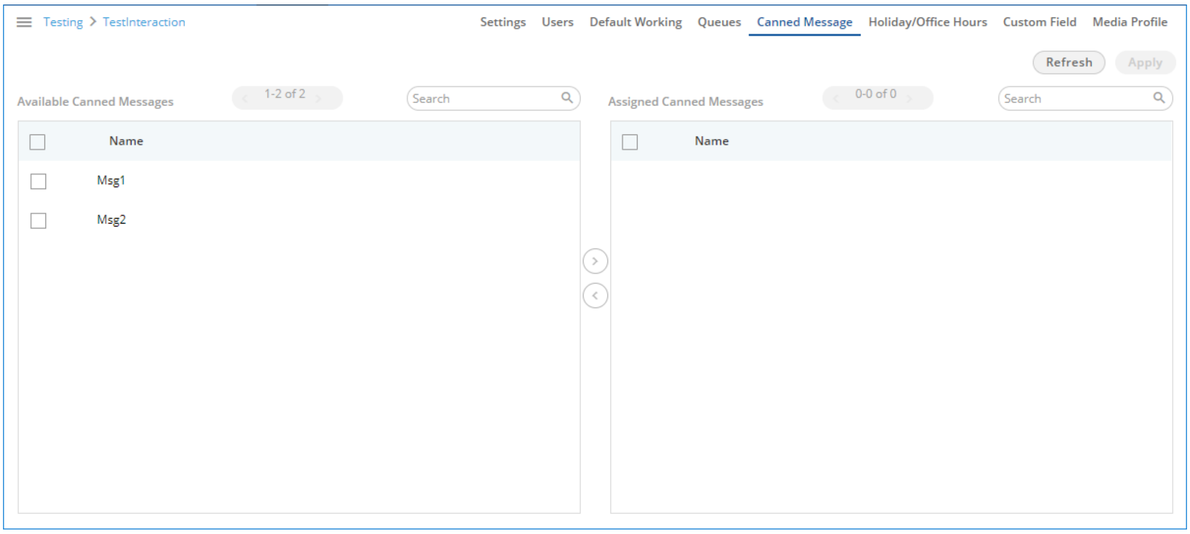


Figure: Canned Messages

Perform the following steps to assign canned messages to this campaign.

1. Select the canned messages in "Available Canned Messages" section
2. Click icon to proceed to assign the selected canned messages.

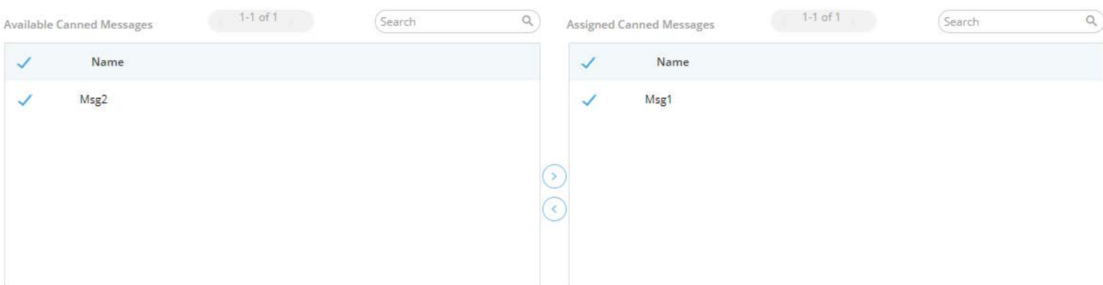


Figure: Assign or Unassign Canned Messages

3. Click "Apply" to assign the canned messages to this campaign.

   Rather, you can click "Refresh" to not assign the canned messages.

To unassign a canned message, select it in "Assigned Canned Messages" section, click icon, and click "Apply" to unassign the selected canned message from the campaign.

10.3.7 Custom Fields

This Tab lets you assign and unassign the custom fields to this campaign. You have created the Custom Fields in the Process Settings and the same will be shown here. Refer to "Custom Fields" in Process Settings to know the steps to create the custom fields.

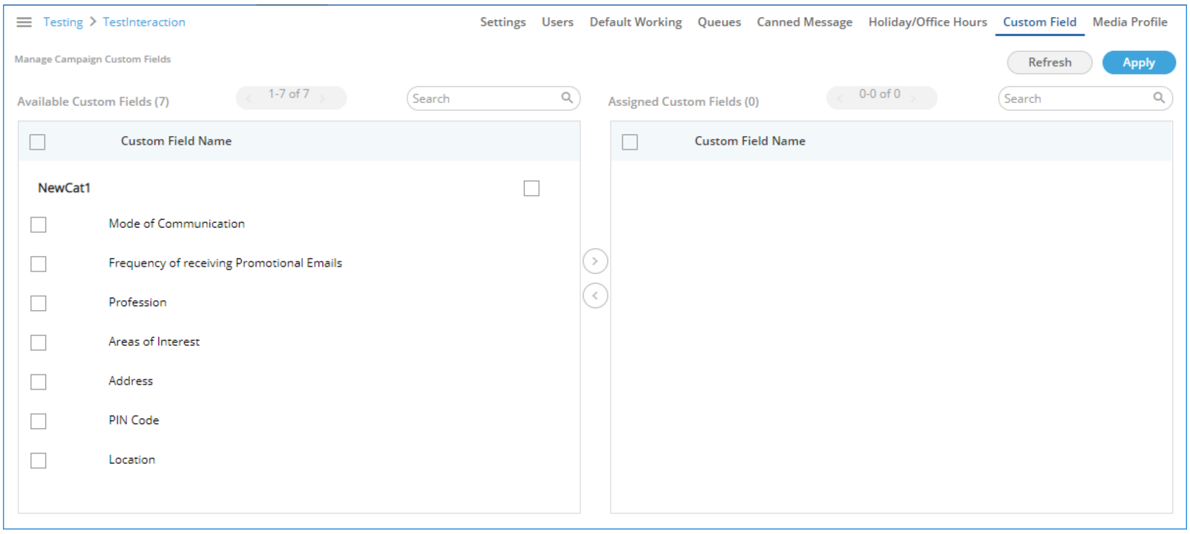


Figure: Custom Fields

Perform the following steps to assign custom fields to this campaign.

1. Select the custom fields in "Available Custom Fields" section

2. Click  icon to proceed to assign the selected custom fields.

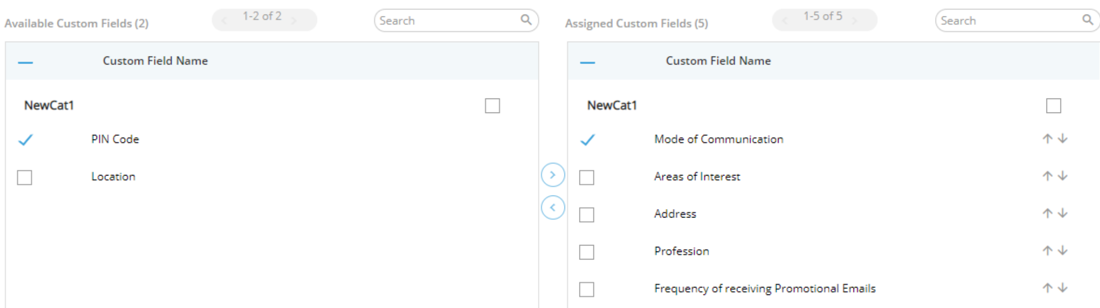


Figure: Assign or Unassign Custom Fields

3. Click "Apply" to assign the custom fields to this campaign.

   Rather, you can click "Refresh" to not assign the custom fields.

To unassign a custom field, select it in "Assigned Custom Fields" section, click icon, and click "Apply" to unassign the selected custom field from the campaign.

10.3.8 Media Profile

This Tab lets you assign and unassign the media profiles to this campaign. You have created the Media Profiles at the System Level and the same will be shown here. Refer to "Media Profiles" in System Configuration to know the steps to create the media profiles.

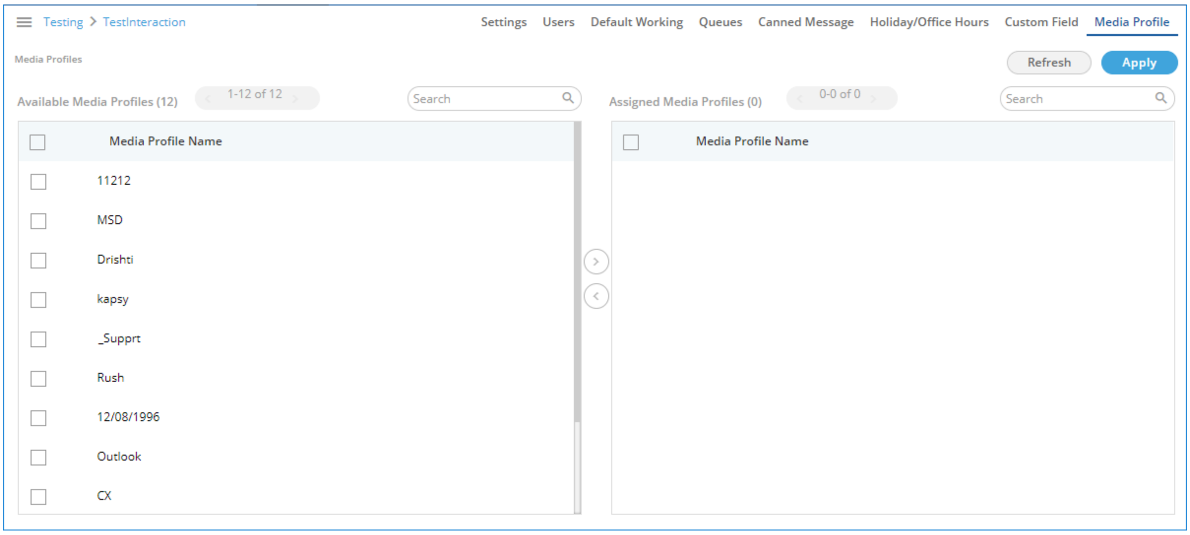


Figure: Media Profile

Perform the following steps to assign media profiles to this campaign.

1. Select the canned messages in "Available Media Profiles" section
2. Click icon to proceed to assign the selected media profiles.

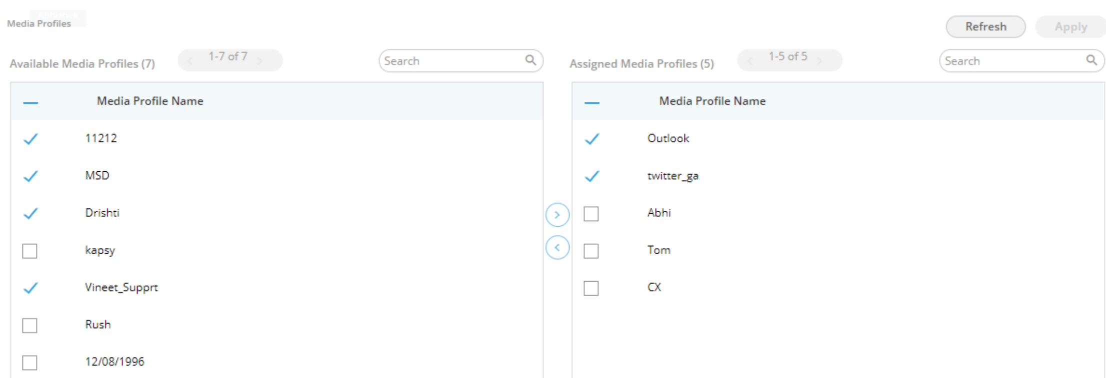


Figure: Assign or Unassign Media Profiles

3. Click "Apply" to assign the Media Profiles to this campaign.

   Rather, you can click "Refresh" to not assign the media profiles.

To unassign a media profile, select it in "Assigned Media Profiles" section, click icon, and click "Apply" to unassign the selected media profile from the campaign.

10.4 Interactive Voice Application Campaign Settings

10.4.1 Interactive Voice Application Campaign Settings

In the left navigation bar of Process Tab, you can select an Interactive Application Campaign to view its settings.

The changes made in settings of one Interactive Voice Application Campaign will be applicable to that campaign itself. They will not be applicable on other similar (intearctive voice application) and different (non-interactive voice application) campaigns.

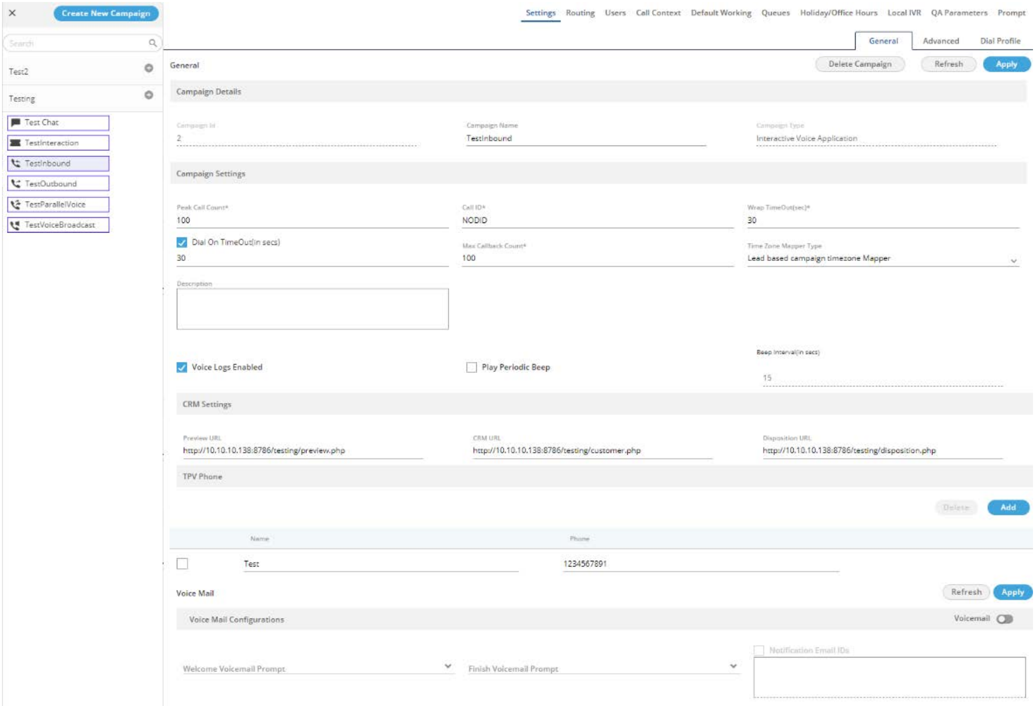


Figure: Settings of Interactive Voice Application Campaign

It contains the following tabs.

- Settings
    - General Settings
    - Advanced Settings
    - Dial Profile Settings
- Queues
- Routing
- Users
- Default Working
- Holiday/Office Hours
- Call Context
- Local IVR
- QA Parameters

- Prompt

10.4.1.1 Settings of Interactive Voice Application Campaign

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

10.4.1.1.1 General Settings

Here, the General Settings are divided into the following sections.

- **Campaign Details:** These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.
- **Campaign Settings:** Except the following it contains those settings, which you have configured while creating this campaign.
  - **Dial On Time out (In seconds):** Select it to define the dial on time-out. With this settings, the dialed calls will be disconnected after the provided seconds if not connected.
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- **TPV Phone:** As per the process requirement, there may be a few numbers to which transfer of calls is very frequent. Third-party verification (TPV) number is used to transfer the call to verifier. Here, such frequently used TPV numbers are added so that the user can directly transfer the case to these numbers.

Figure: TPV Phone

Click "Add" to show a row to add TPV Phone number. Enter the name and phone number. You can add multiple TPV Numbers. To delete a TPV phone number, click its checkbox to select it and click "Delete".

-

- **Voicemail Configuration:** Perform the following steps to enable the voicemail feature on the queue level. If this is not enabled, then voicemails will not be recorded.

  Make sure to upload the Prompts through "Prompts" tab in the campaign to use them in Voicemail.

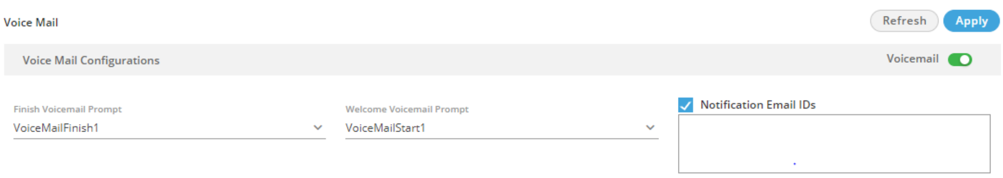
  - Click "Voicemail" toggle switch to turn it on.
  - **Welcome Voicemail Prompt:** Select the welcome voicemail prompt from the drop-down field.
  - **Finish Voicemail Prompt:** Select the finish voicemail prompt from the drop down field.
  - 

    Figure: Voicemail Configuration

  - **Notifications Email IDs:** Check "Notification Email IDs" to send the voicemail notifications to the selected recipients. After enabling it, enter the email addresses (only Gmail domain) of the recipients Administrator separated by comma. For example: email1@gmail.com, email2@gmail.com.

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

- Click here to know more about the Campaign Details and CRM Settings for this campaign.

- After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

10.4.1.1.2 Advanced Settings

Here, the Administrator can configure the Advanced Settings of an Interactive Voice Application Campaign.

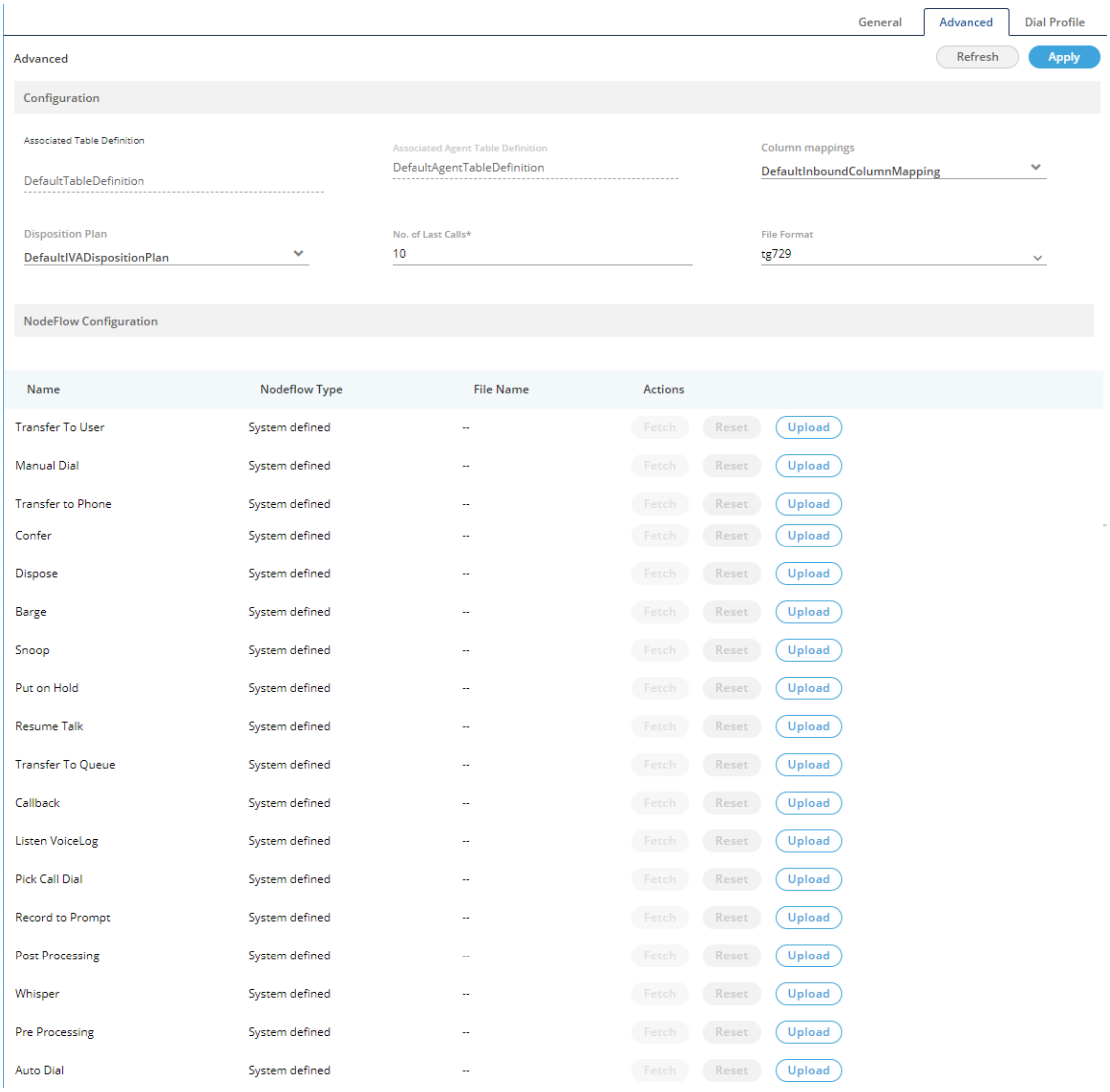


Figure: Advanced Settings

This tab can be divided into two sections - "Configuration" and "NodeFlow Configuration". In "Configuration", you can modify those settings that you have configured while creating this campaign.

"NodeFlow Configuration" lets you upload the nodeflow for the different functions listed herein below.

- Transfer to User
- Manual Dial
- Transfer to Phone
- Confer
- Dispose
- Barge
- Snoop
- Put on Hold
- Resume Talk
- Transfer to Queue
- Callback
- Listen VoiceLog
- Pick Call Dial
- Record to Prompt
- Post Processing
- Whipser
- Pre Processing
- Auto Dial

10.4.1.1.3 Dial Profile Settings

Here, the Administrator can create the dial profiles for the campaigns using the Routing Plans. So, it is necessary to create the Routing Plans first before configuring this tab.

Before creating a routing plan, you have to assign and manage the users, assign the call contexts, and create the queues.

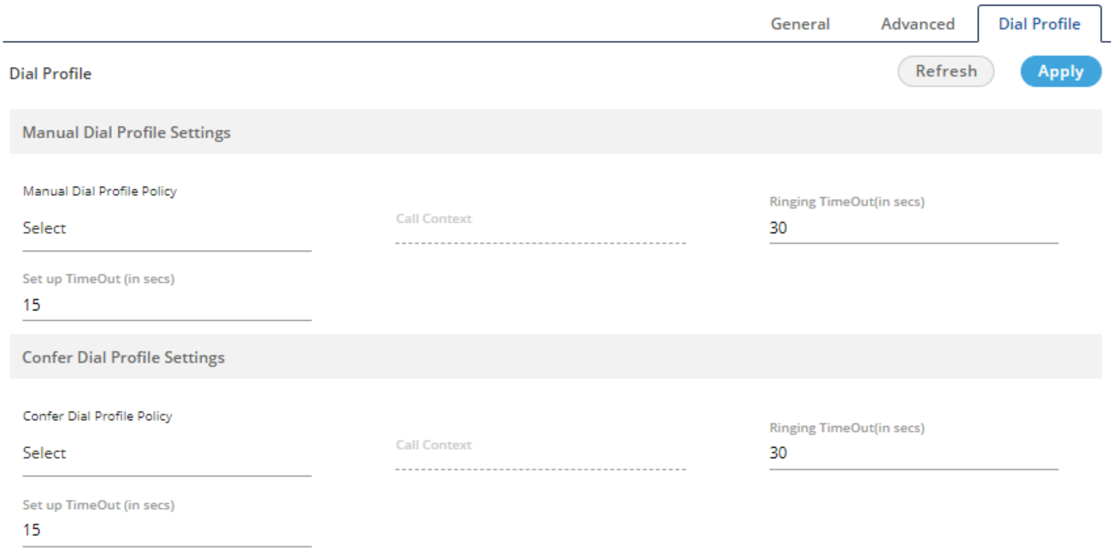


Figure: Dial Profile Settings

Perform the following steps to configure the Dial Profile Settings for Manual Dial and Confer Dial (Conference Dial).

-

1. **Manual Dial Profile Settings:** It lets you configure the settings for Manual Dial Profile. Perform the following steps.
   A. "Manual Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".
   B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds
   C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds
2. **Confer Dial Profile Settings:** It lets you configure the settings for Confer Dial (Dial during Conference) Profile. Perform the following steps.

A. "Confer Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".

B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds

C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

3. Click "Apply" to apply the dial profile for any section.
   Rather, you can click "Refresh" to discard the changes.

When you click apply, the values for Call Context for the selected Policy is populated in "Call Context" column.

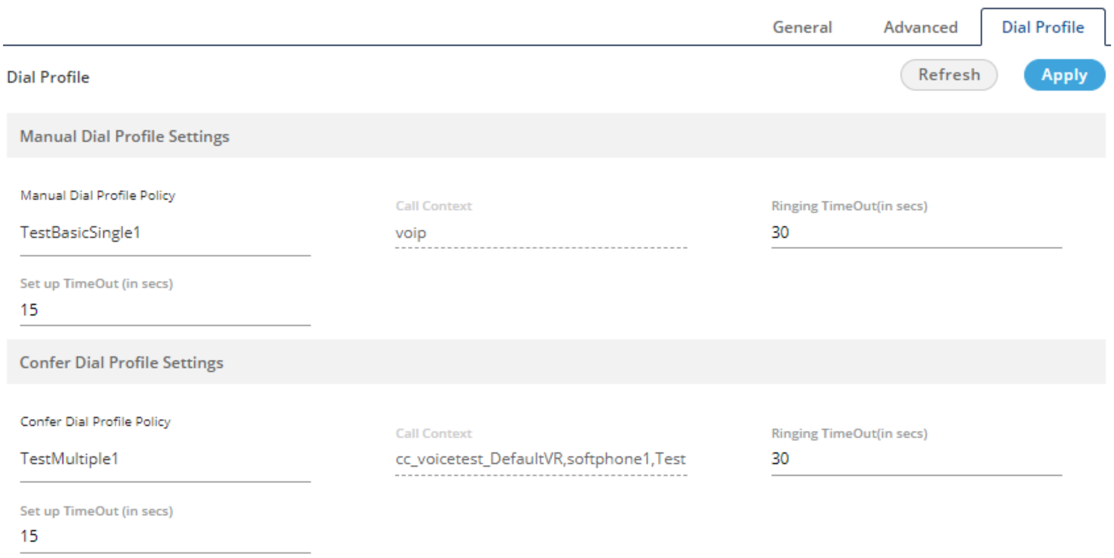


Figure: Configured Dial Profile Settings

10.4.1.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the Chat Campaign Settings. Know more...

10.4.1.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the Chat Campaign Settings. Know more...

10.4.1.4 Default Working

Here, you can select the users who will be logged in to this campaign, by default, and will not receive the prompt to select the campaign. This tab has already been explained in the Chat Campaign Settings. Know more...

10.4.1.5 Holiday/Office Hours

Here, you can define the holidays, office hours, and non-working hours for this campaign. This tab has already been explained in "System Configuration". Know more...

10.4.1.6 Other Settings

Other Settings are explained in the following subsequent pages. Click the links to know more about them.

-
  - **Call Contexts**
  - **Routing**
  - **Local IVR**
  - **QA Parameters**
  - **Prompt**

10.4.2 Call Context in a Campaign

Call context is basically the SIP channel that is visible and will be used by the agent to initiate the calls. This Tab lets you assign and unassign the call contexts to this campaign, which you have created in Call Manager. Refer to ["Call Manager"]() to know the steps to create the call contexts.

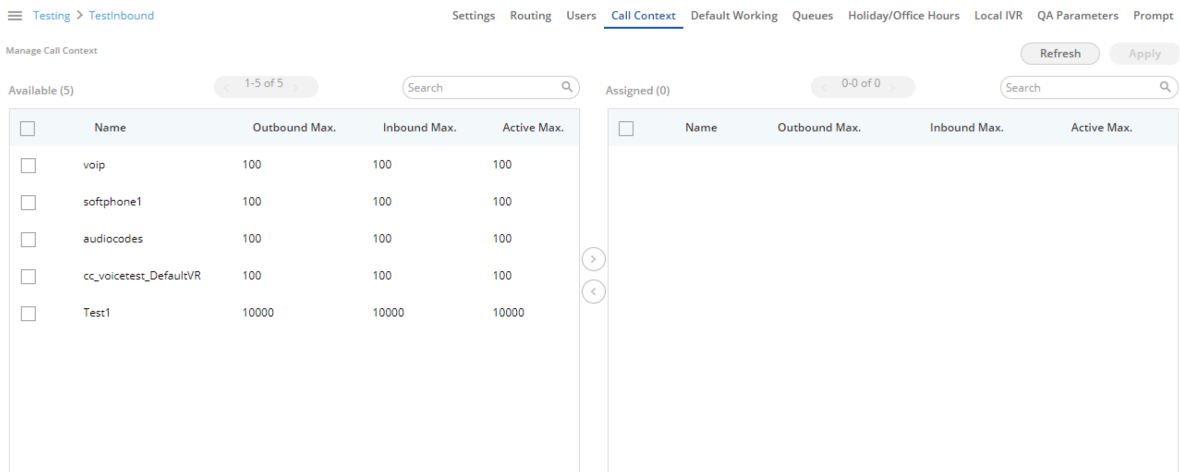


Figure: Call Context Settings

Perform the following steps to assign call contexts to this campaign.

1. Select the call contexts in "Available Call Contexts" section
2. Click icon to proceed to assign the selected call contexts.

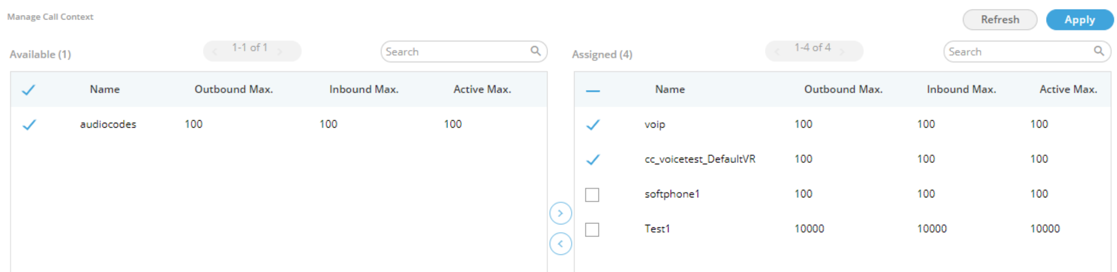


Figure: Assign or Unassign Call Contexts

3. Click "Apply" to assign the call contexts to this campaign.

   Rather, you can click "Refresh" to not assign the Call Contexts.

To unassign a call context, select it in "Assigned Call Contexts" section, click icon, and click "Apply" to unassign the selected call context from the campaign.

10.4.3 Routing in a Campaign

Here, you can create and manage the routing for both Inbound and Outbound Calls.

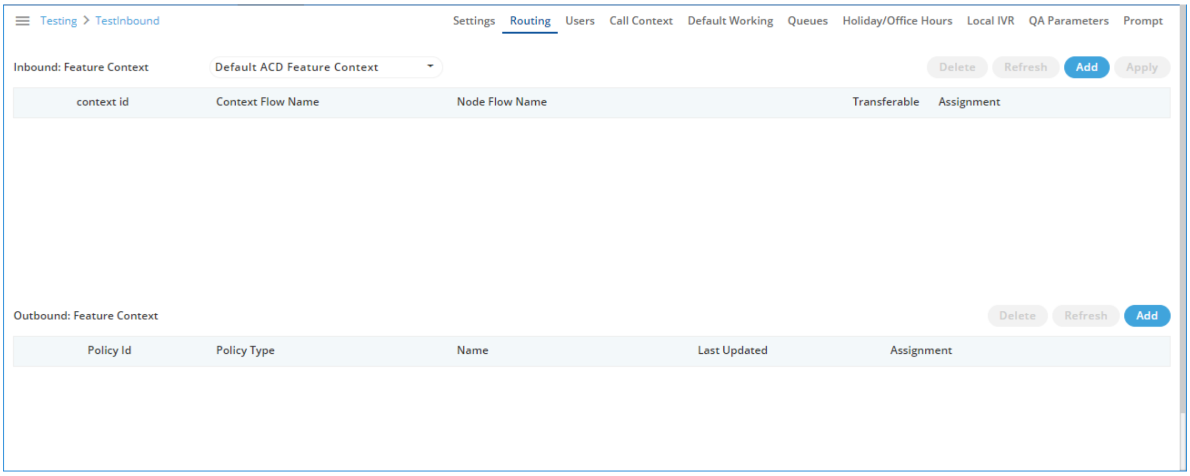


Figure: Routing

10.4.4 Routing for Inbound

The steps to create the routing plan for an inbound feature context has already been explained in the Chat Campaign Settings. [Know more...]

10.4.5 Routing for Outbound

In "Outbound: Feature Context" section, perform the following steps.

1. Click "Add" to add a routing policy for the Outbound feature context.
2. It creates a new row in the blank area.

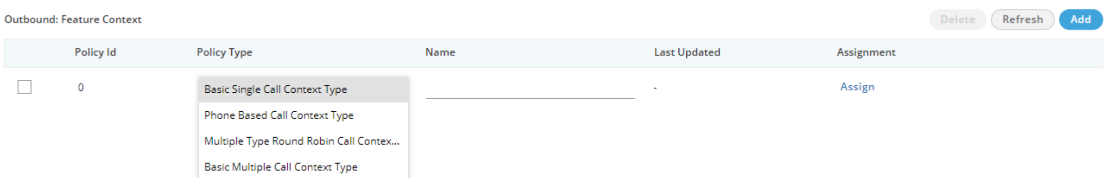


Figure: Adding an Outbound Routing Policy

3. Select any of the following Policy Types.
   - **Basic Single Call Context Type:** It is the policy type in which outbound calls will be dialed out from the single call context.

- **Phone Based Call Context Type:** It is the policy type in which administrator can define the pattern on basis of which numbers will be dialed out from multiple call context. It will only reflect after procuring appropriate licenses.
- **Basic Multiple Call Context Type (Licensable):** It is the policy type in which outbound calls will be dialed out from multiple call context. It will only reflect after procuring appropriate licenses.
- **Multiple Type Round Robin Call Context Type:** It is the policy in which if a call tried by a call context fails to get connected, then it will be tried by the different call contexts that are selected for calling as per Round-Robin algorithm. As per Round-Robin Algorithm, each call context is used to call for a fixed amount of time and if the call does not get connected in that duration, another call context is used. The left over call context is reused when all other call contexts in the loop are used and the call is still not connected.

Make sure to not provide a name for the Routing for any "Outbound: Feature Context". The name will be assigned automatically after selecting the call contexts.

The Outbound Routing with manual names will not work.

4. Click "Assign" link under "Assignment" header to select a call context that you have assigned in this campaign in "Call Context" Tab. Following pop-up is displayed for "Basic Single Call Context Type" on the page.

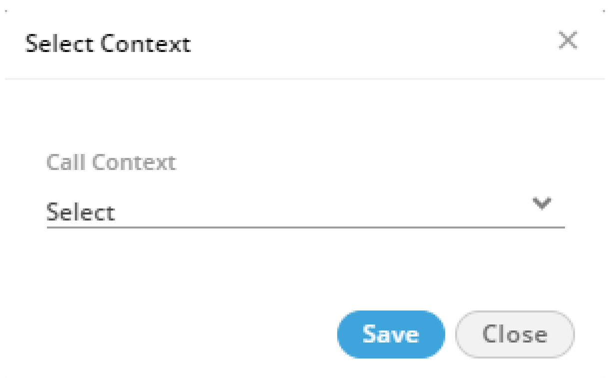


Figure: Select Call Context for Basic Policy

For "Phone Based Call Type", "Basic Multiple Call Context Type", and "Multiple Type Round Robin Call Context Type", the following pop-up appears to select the multiple call contexts.

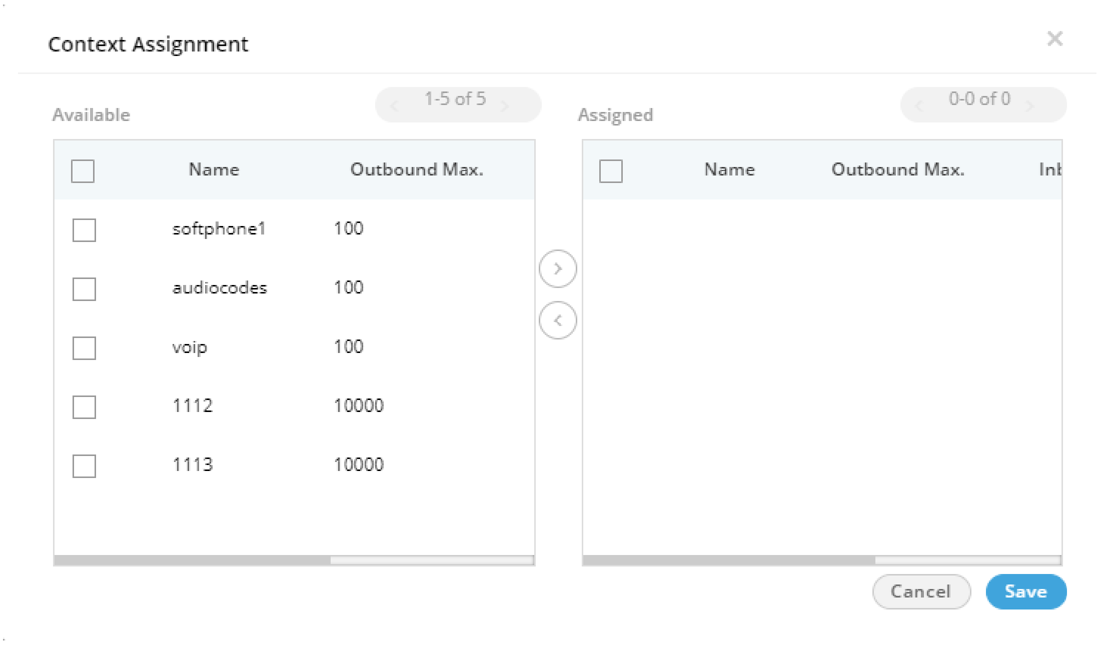


Figure: Select Call Contexts for Multiple Type Policy

Perform the following steps to assign call contexts to this new policy.

3.

A. Select the call contexts in "Available" section

B. Click  icon to proceed to assign the selected call contexts.

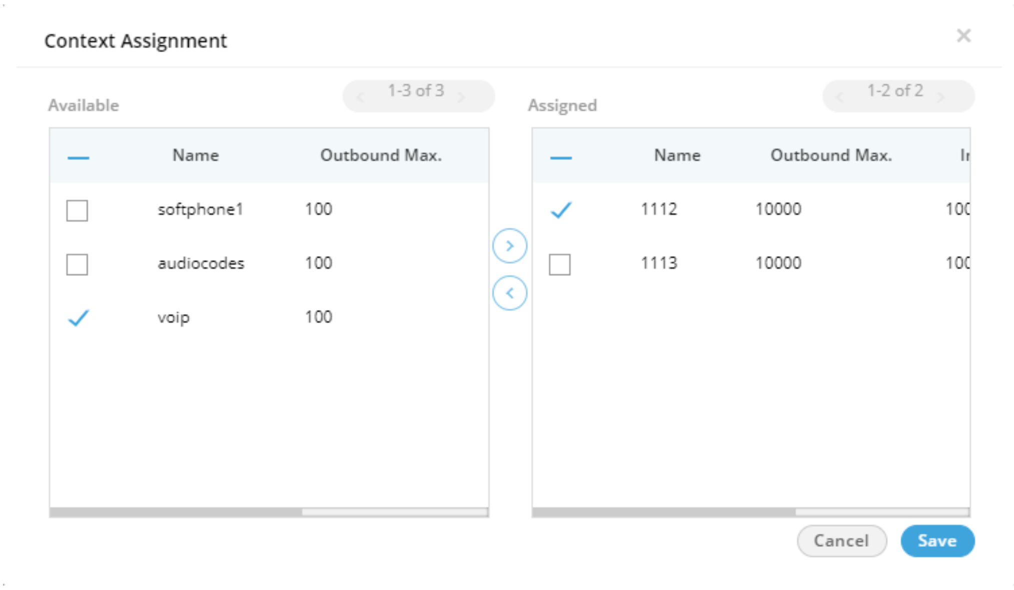


Figure: Assign or Unassign Call Contexts

C. Click "Save" to assign the call contexts to this campaign.

Rather, you can click "Cancel" to not assign the Call Contexts.

To unassign a call context, click the link under "Assign" header for a new or existing Outbound Routing Policy, select a call context in "Assigned Call Contexts" section, click icon, and click "Save" to unassign the selected call context from the campaign.

4. Click "Save" to proceed to add the selected context to the routing policy.
5. Click "Apply" to create the Routing Plan for Outbound.

You can create multiple routing policies for the Outbound Feature in the Interactive Voice Application (Inbound) Campaign.

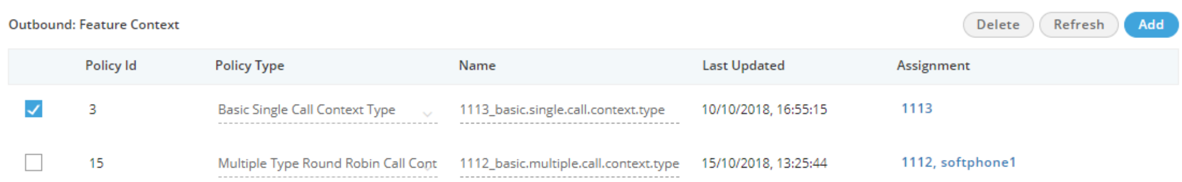


Figure: Added Outbound Routing Policies

You can only change the selected Call Contexts while modifying an Outbound Routing Policy. In addition to that, you can also delete a routing policy.

10.4.6 Local IVR in a Campaign

"Local IVR" is a full-fledged IVR (Interactive Voice Response) running locally that is in the telephony channel upon which IVR is running. There can be two types of Local IVRs. One that runs primarily upon receiving a call and consumes a telephony channel (SIP or Zap Trunk). Whereas, the another IVR is called by the agent during the call with the customer and does not consume any telephony channel. "Local IVR" Tab in Interactive Voice Application Campaign Settings lets the Administrator create the Local IVRs.

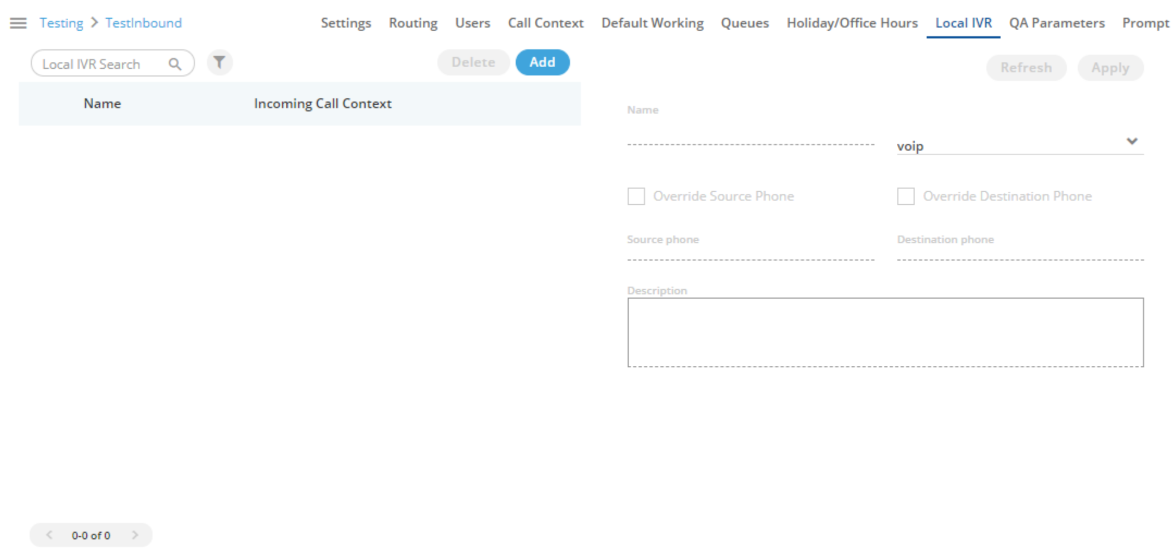


Figure: Local IVR Tab

Perform the following steps to add a Local IVR.

1. Click "Add" to add a Local IVR using the following pop-up.

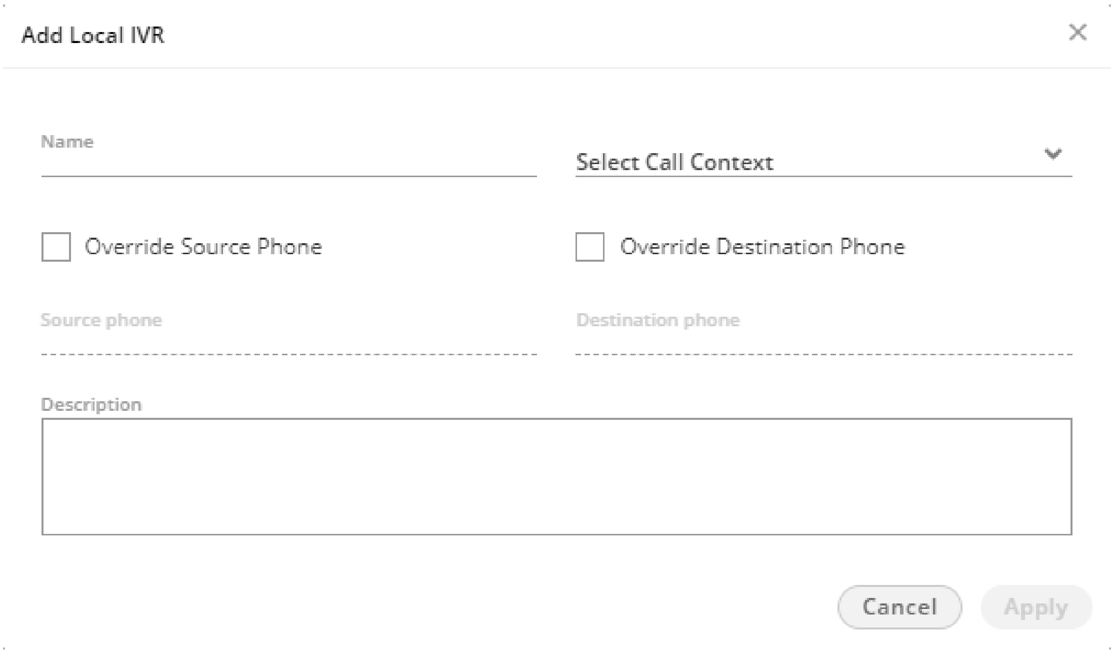


Figure: Add a Local IVR

2. Provide a name for the new IVR.
3. "Call Context" drop-down menu lists all Call Contexts that you have assigned to this campaign. Select anyone of them.
4. Select "Override Source Phone" option to override the source number (from which a call is being received) of the incoming call with the provided number. After checking it, provide a number in its relevant textbox.
5. Select "Override Destination Phone" option to override the destination number (to which a call is being dialled) of the outbound call with the provided number. After checking it, provide a number in its relevant textbox.
6. Provide a description in "Description" text box.

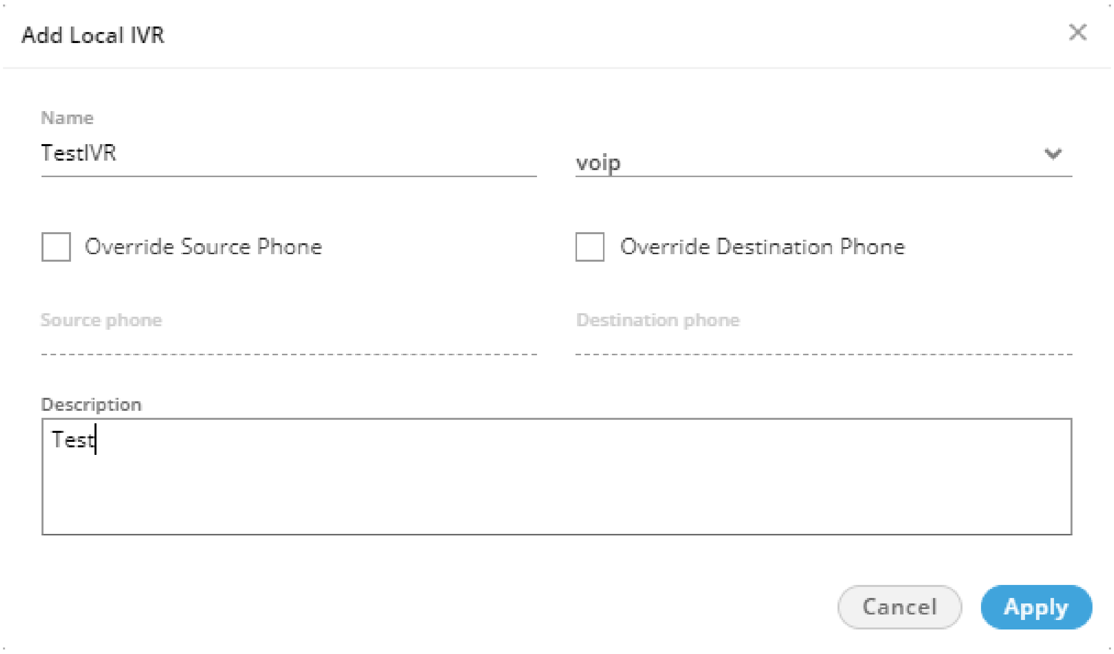


Figure: Sample Details

7. Click "Apply" to create the local IVR using the selected call context.

   Rather you can click "Cancel" to not create it

You can follow these steps to create multiple Local IVRs.

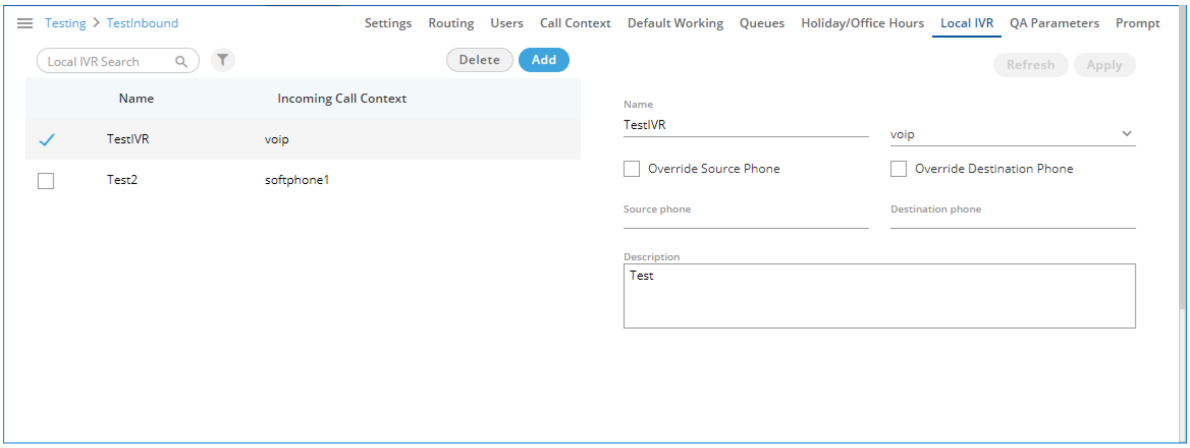


Figure: Local IVRs

You can modify the settings of a Local IVR and delete it, if not required.

10.4.7 QA Parameters in a Campaign

This Tab lets you assign and unassign the QA Parameters to this campaign, which you have created at the System Level. Refer to ["QA Parameters" in System Configuration] to know the steps to create the QA Parameters.

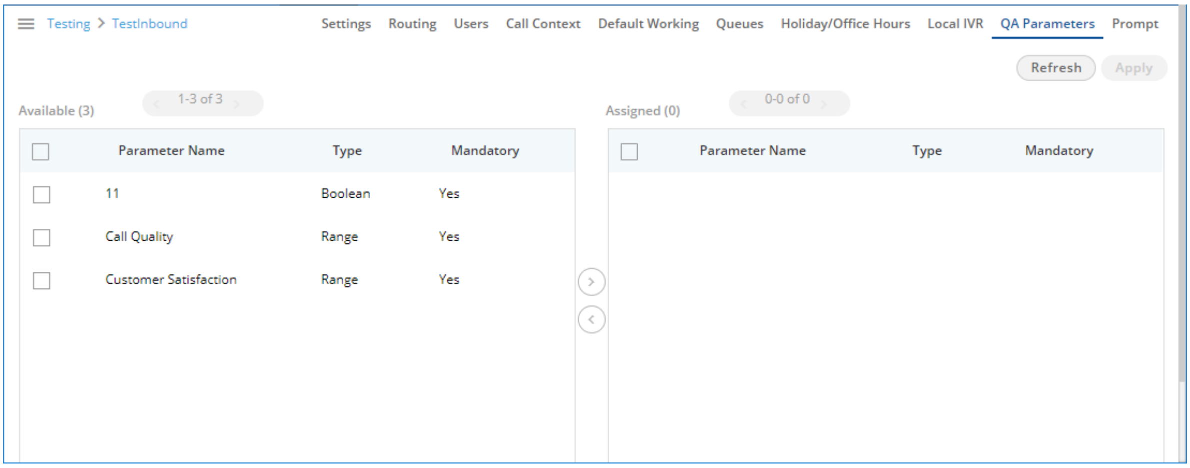


Figure: QA Parameters

Perform the following steps to assign QA Parameters to this campaign.

1. Select the QA Parameters in "Available" section
2. Click  icon to proceed to assign the selected QA Parameters.

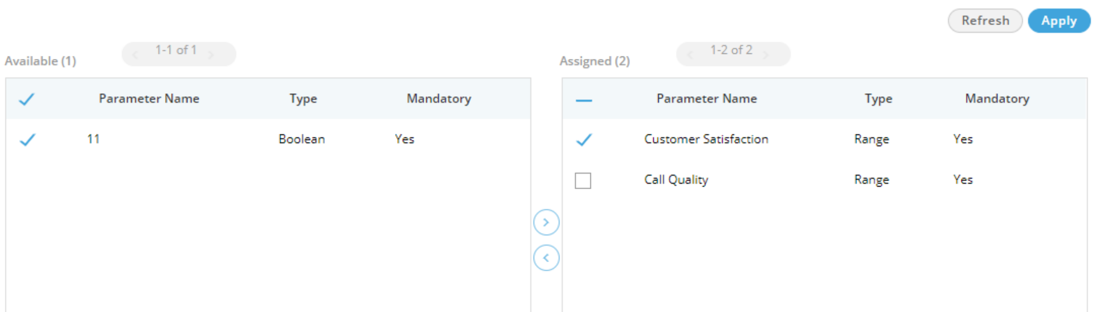


Figure: Assign or Unassign QA Parameters

3. Click "Apply" to assign the QA Parameters to this campaign.

   Rather, you can click "Refresh" to not assign the selected parameters.

To unassign a QA Parameter, select it in "Assigned" section, click icon, and click "Apply" to unassign the selected QA Parameter from the campaign.

10.4.8 Prompts in a Campaign

This Tab allows you to create the Voice Message Prompts for the campaign. The prompts can be created using the existing voice recordings saved in .wav formats.

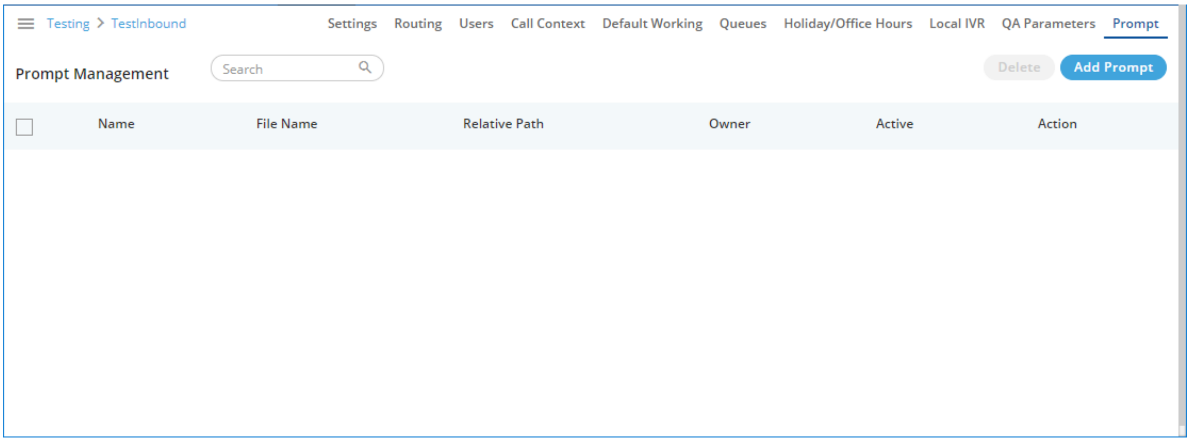


Figure: Prompt Management

Perform the following steps to create a Prompt.

1. Click "Add Prompt" button in the top right corner. It shows the following pop-up.

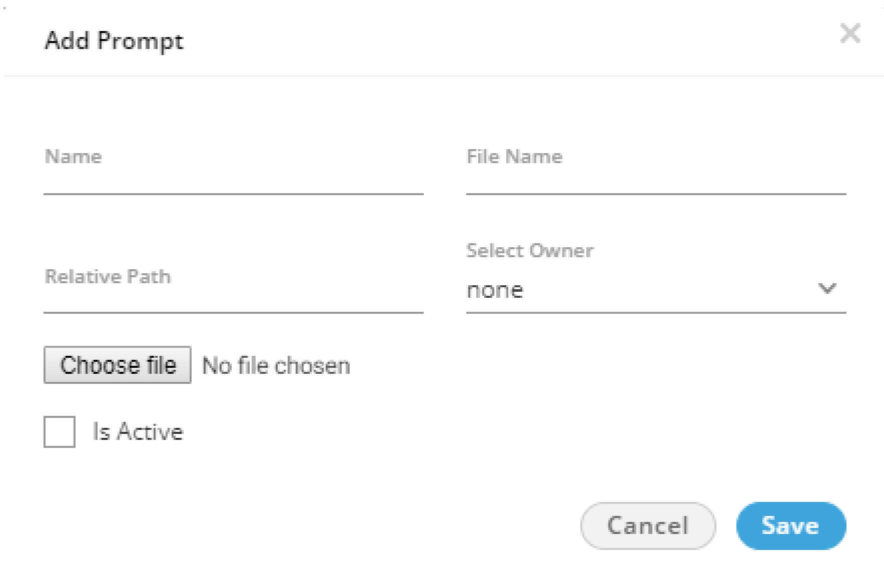


Figure: Add a Prompt

2. Provide a name for the prompt.
3. Provide a name for the sound file, that you are going to upload.
4. Provide a name for a folder, in which the sound file will be stored. This folder will be created on server and if it exists already, the file will be saved into it.
5. Click "Choose File" to select the sound file on your disk.
6. Check "Is Active" to make this new prompt as Voice Prompt. Else uncheck it to disable it.

   Following is a screenshot containing sample details.

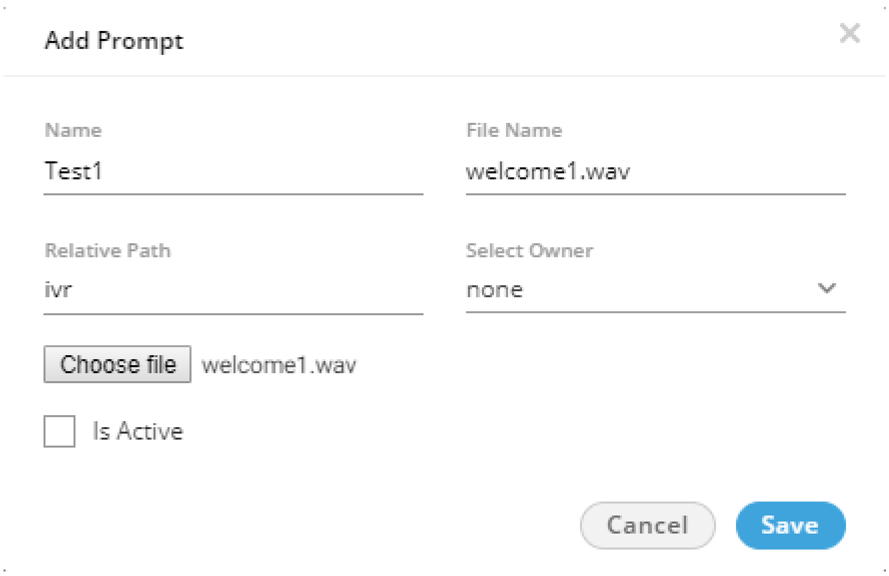


Figure: Adding Prompt with Sample Details

7. Click "Save" to create the Prompt message.

   Rather, you can click "Cancel" to not create a prompt.

You can create multiple prompts using these methods.

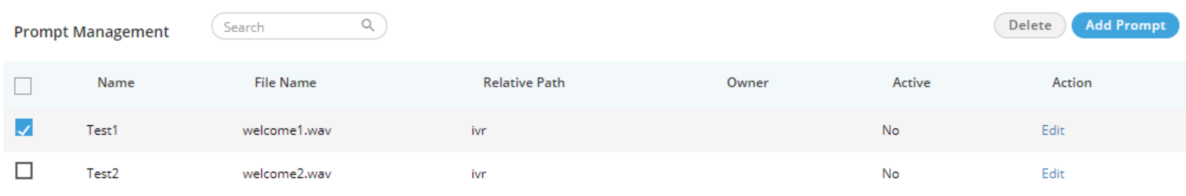


Figure: Added Prompts

10.4.9 Edit Prompt

Click "Edit" link under "Action" column header for any prompt to edit it. It shows the following pop-up.

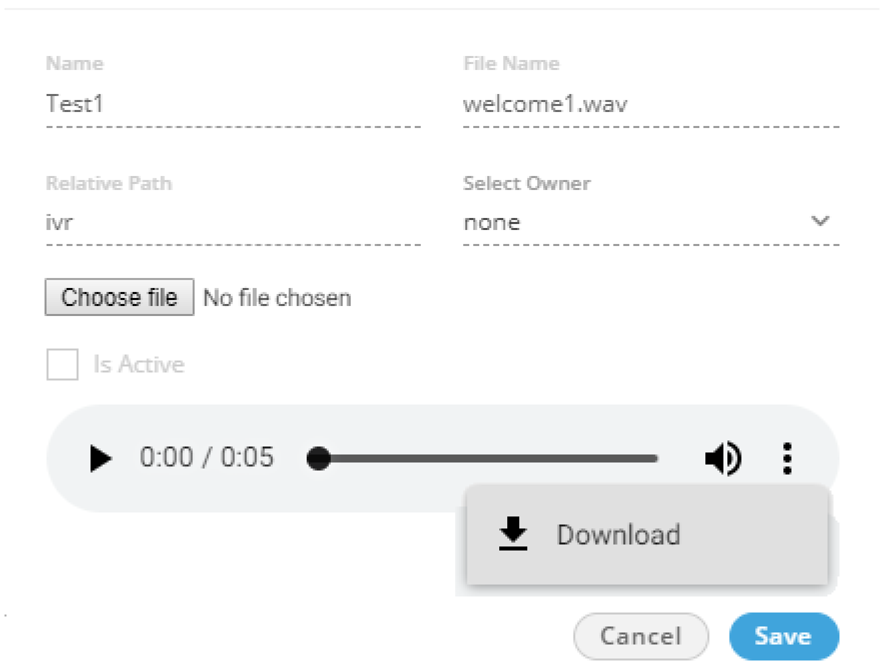


Figure: Edit a Prompt

You cannot make any change here. The prompt name, file name, or path (where it is stored) cannot be changed. You can either play the uploaded file or click menu icon to download it.

You can select a prompt and click "Delete" button on top right corner to delete. However, the deleted prompts cannot be restored.

10.5 Outbound Voice Campaign Settings

10.5.1 Outbound Voice Campaign Settings

In the left navigation bar of Process Tab, you can select an Outbound Voice Campaign to view its settings.

The changes made in settings of one Outbound Voice Campaign will be applicable to that campaign itself. They will not be applicable on other similar (outbound) and different (non-outbound) campaigns.

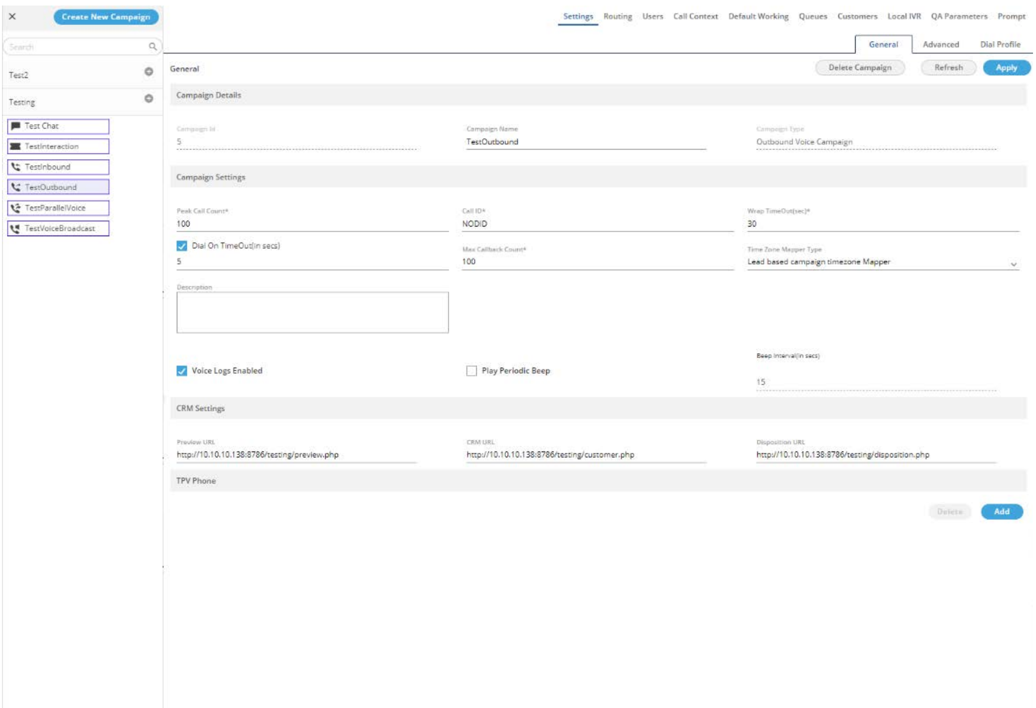


Figure: Settings of Outbound Voice Application Campaign

It contains the following tabs.

- Settings
  - General Settings
  - Advanced Settings
  - Dial Profile Settings
- Queues
- Routing
- Users

- Default Working
- Holiday/Office Hours
- Call Context
- Customers
- Local IVR
- QA Parameters
- Prompt

10.5.1.1 Settings of Outbound Voice Application Campaign

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

10.5.1.1.1 General Settings

Here, the General Settings are divided into the following sections.

-
- **Campaign Details:** These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.
- **Campaign Settings:** It contains the same settings, which you have configured while creating this campaign.
-
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
-
- **TPV Phone:** As per the process requirement, there may be a few numbers to which transfer of calls is very frequent. Third-party verification (TPV) number is used to transfer the call to verifier. Here, such frequently used TPV numbers are added so that the user can directly transfer the case to these numbers.

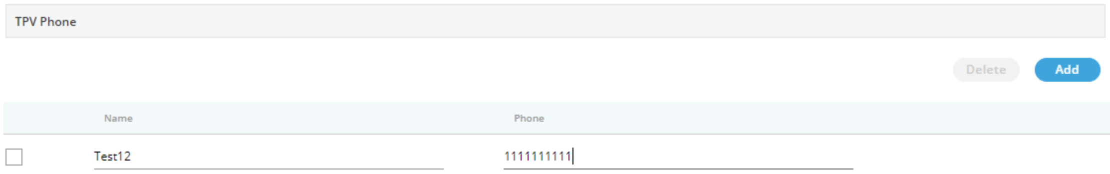


Figure: TPV Phone

Click "Add" to show a row to add TPV Phone number. Enter the name and phone number. You can add multiple TPV Numbers. To delete a TPV phone number, click its checkbox to select it and click "Delete".

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

- Click here to know more about the Campaign Details and CRM Settings for this campaign.
- After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

10.5.1.1.2 Advanced Settings

Here, the Administrator can configure the Advanced Settings of an Outbound Voice Campaign.

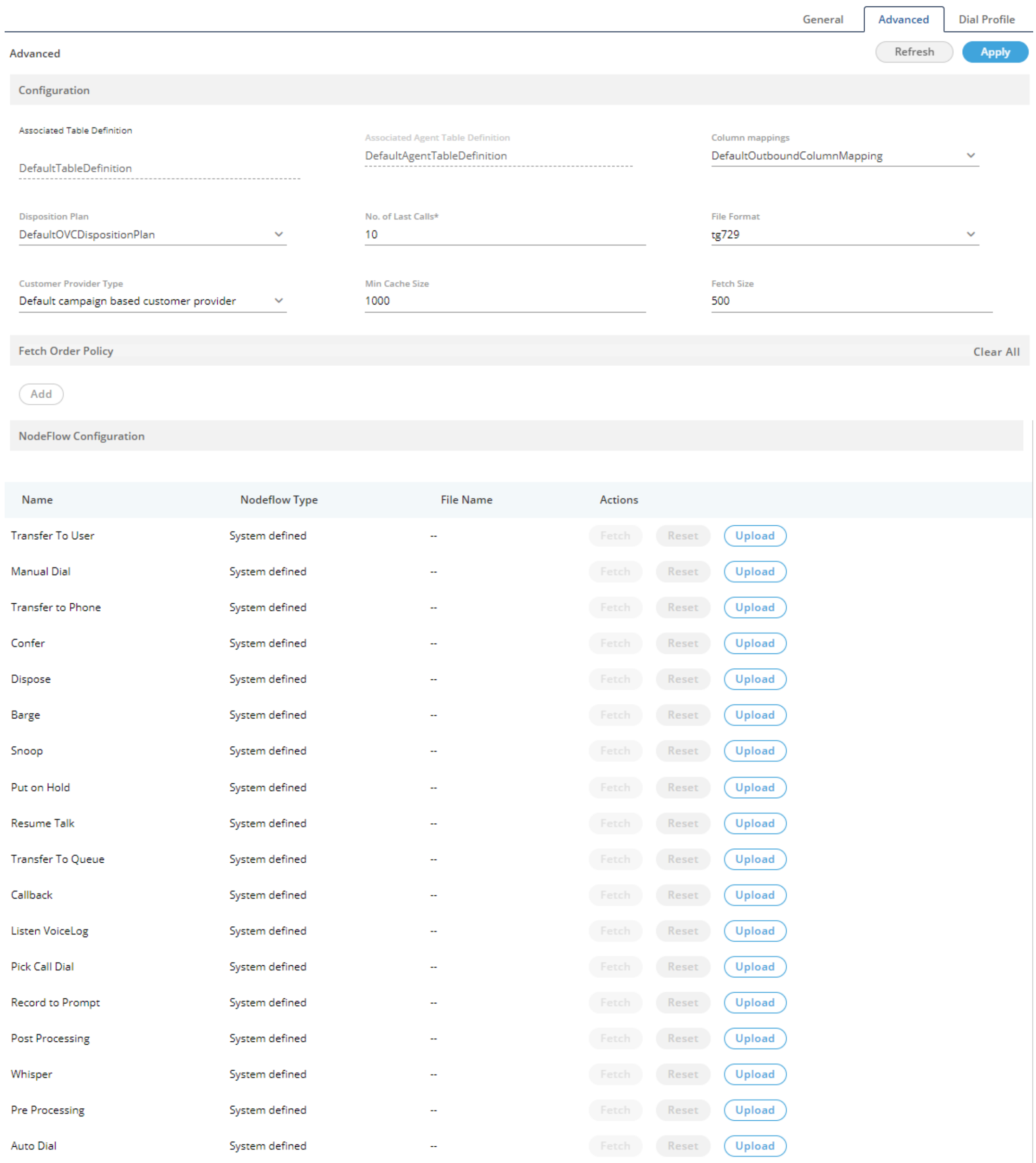


Figure: Advanced Settings

This tab can be divided into these sections - "Configuration", "Fetch Order Policy", and "NodeFlow Configuration".

-
- **Configuration:** Except the following, "Configuration" section contains those settings that you have already configured while creating this Outbound

campaign. You can change the values for Column Mappings, Disposition Plan, Number of Last Calls, and File Format.

-
- **Customer Provider Type:** Select the algorithm for the dialer to pick and dial the customers from the database.
    - Campaign Based Customer Provider: It is the default customer provider, which will fetch maximum possible numbers from the highest priority leads in one query. If numbers fetched are less than the required numbers, then it will also fetch numbers from the lower priority leads. Cache will not be maintained on per lead basis.
    - This provider will fallback to Lead Based Customer Provider in a Predictve Parallel Campaign.
    - Lead Based Customer Provider: It can be used to dial the numbers as per the lead priority. Customers with high priority will be dialed first, whereas customers with less priority will be dialed after it. If two leads have same priority numbers, then they will be selected for dialing as per their weights.
        -
        - Lead Based Customer Provider is the recommended for Parallel Predictve Dialer and Parallel Predictive Campaign.
        - It is recommended to maintain cache per lead in case of lead to queue mapping in a Parallel Predictive Campaign so that all the queues get enough numbers, if available.
        - This method is not recommended when lead leveling is not required.

- If large number of leads are enabled for a campaign and no lead leveling is required, then this method is not recommended. Else, the Campaign Based Customer Provider is recommended in such a scenario.

- PACE Based Customer Provider: It is the recommended method for a Parallel Predictive Campaign. Select it to enable the PACE.

  - **Minimum Cache Size:** Provide the minimum size for the cache that is the count of numbers that can be stored a time.
  - **Fetch Size:** Provide the count of numbers that can be fetched at a time.

-

- **Fetch Order Policy:** Here, you have to add and define "Fetch Order Policy" to fetch the customers' numbers. Select any of the following policies.
  - **Customer Upload Time:** The customers to be dialed are selected as per the time of the uploading of their numbers to the campaigin. After selecting it, you can select ascending or descending order of the sorting the numbers.

Figure: "Customer Upload Time" Fetch Order Policy

In the ascending order, the customer whose number is uploaded very first will be dialed first and so on. In the descending order, the customer whose number is uploaded very last will be dialed first and so on.

  - **Randomized order of lead upload:** The customers to be dialed are selected randomly from the lead. The random algorithm to sort the values in the database is used.

- **Natural Order of Lead Upload:** The customers to be dialed are selected as per the same order as they are originally presented in the CSV file, which was uploaded.
- **Number of Attempts:** The customers to be dialed are selected as per the number of attempts made to dial their numbers. After selecting it, the administrator can select the Ascending or Descending order.

Figure: "Number of Attempts" Fetch Order Policy

- **Customer Information:** The customers to be dialed are selected as per the ascending or descending order of the values of any customer information field. After selecting it, the administrator has to select the customer information field as per which the customers to be dialed has to be selected.

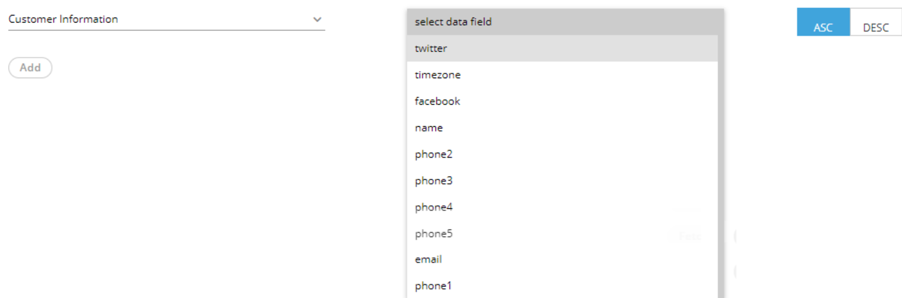


Figure: "Customer Information" Fetch Order Policy

  After selecting the field, the administrator can opt for ascending or descending sorting.

- **CUSTOM :**Here, the Administrator can provide its own customized JavaScript code to create a customized order of selecting the customers to be dialed. Multiple conditions can be mixed using this method.
- **User Disposition Retry Time:** The customers to be dialed are selected as per the retry time attached to their disposition. After

selecting it, the administrator can select the Ascending or Descending order.

Figure: "User Disposition Retry Time" Fetch Order Policy

In Ascending order, those customers will be dialed first who has least disposition retry time. In descending order, those customers will be dialed first who has the highest disposition retry time.

▪

- **NodeFlow Configuration:** It lets you upload the nodeflow for the different functions listed herein below.
  - Transfer to User
  - Manual Dial
  - Transfer to Phone
  - Confer
  - Dispose
  - Barge
  - Snoop
  - Put on Hold
  - Resume Talk
  - Transfer to Queue
  - Callback
  - Listen VoiceLog
  - Pick Call Dial
  - Record to Prompt
  - Post Processing

- Whipser
- Pre Processing
- Auto Dial

10.5.1.1.3 Dial Profile Settings

Here, the Administrator can create the dial profiles for this campaign using the Routing Plans. So, it is necessary to create the Routing Plans first before configuring this tab.

Before creating a routing plan, you have to assign and manage the users, assign the call contexts, and create the queues.

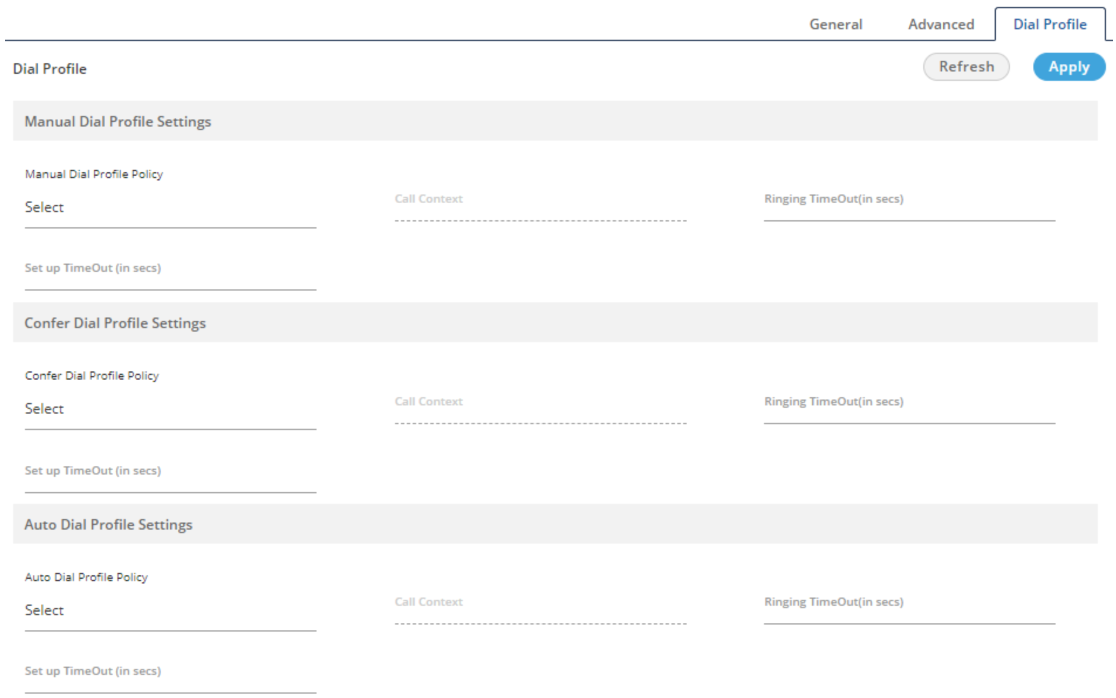


Figure: Dial Profile Settings

Perform the following steps to configure the Dial Profile Settings for Manual Dial, Confer Dial (Conference Dial), and Auto Dial.

-

1. **Manual Dial Profile Settings:** It lets you configure the settings for Manual Dial Profile. Perform the following steps.

A. "Manual Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".

B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds

C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

2. **Confer Dial Profile Settings:** It lets you configure the settings for Confer Dial (Dial during Conference) Profile. Perform the following steps.

    A. "Confer Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".

    B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds

    C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

3. **Auto Dial Profile Settings:** It lets you configure the settings for Auto Dial Profile. Perform the following steps.

    A. "Auto Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".

    B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call.

Provide a value in seconds for the same. The default value is 30 seconds

C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

4. Click "Apply" to apply the dial profile for any section.

   Rather, you can click "Refresh" to discard the changes.

When you click apply, the values for Call Context for the selected Policy is populated in "Call Context" column.

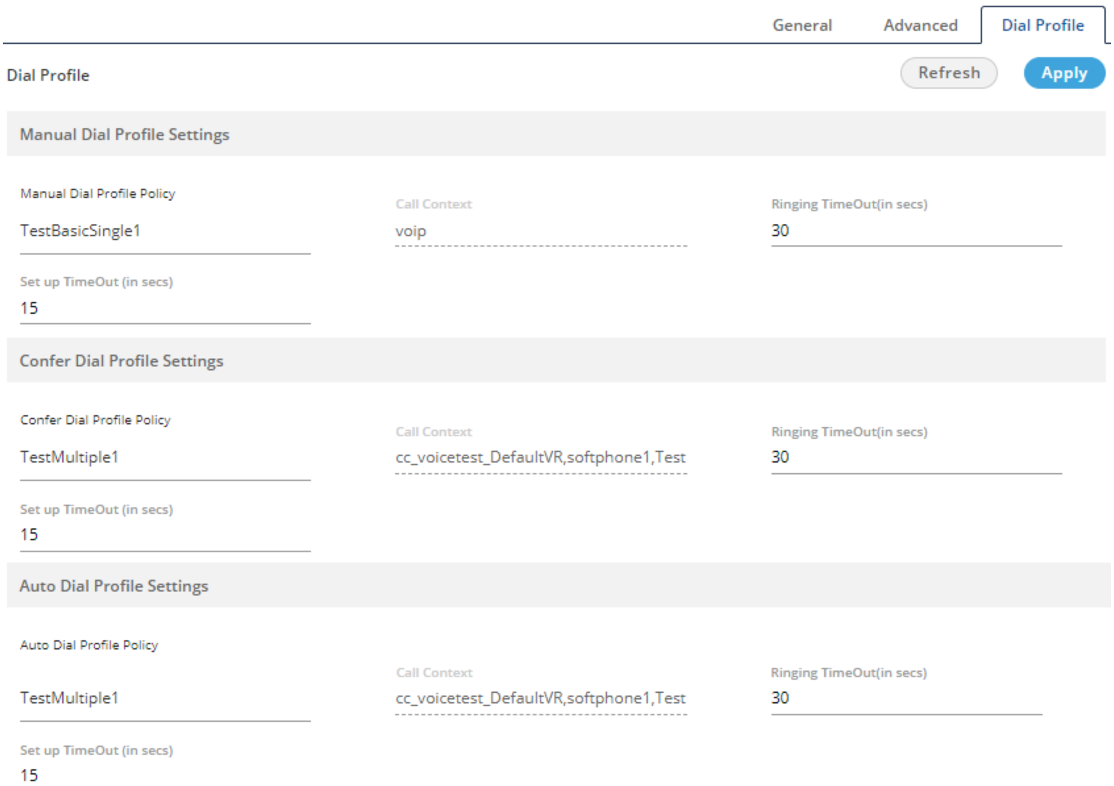


Figure: Configured Dial Profile Settings

10.5.1.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the Chat Campaign Settings. Know more...

10.5.1.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the Chat Campaign Settings. Know more...

10.5.1.4 Default Working

Here, you can select the users who will be logged in to this campaign, by default, and will not receive the prompt to select the campaign. This tab has already been explained in the Chat Campaign Settings. Know more...

10.5.1.5 Holiday/Office Hours

Here, you can define the holidays, office hours, and non-working hours for this campaign. This tab has already been explained in "System Configuration". Know more...

10.5.1.6 Call Context

Here, you can define the call contexts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.5.1.7 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.5.1.8 Local IVR

Here, you can create the Local IVRs for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.5.1.9 QA Parameters

Here, you can assign or unassign the QA Parameters to this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.5.1.10 Prompt

Here, you can create and manage the Voice Prompts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.5.1.11 Other Settings

Other Settings are explained in the following subsequent pages. Click the links to know more about them.

-
    - Customer Filters

10.5.2 Customer Filter in a Campaign

Customer Filters filter the numbers of customers to be dialed. This tab shows the filters, which you have created for Outbound Campaign in "System Configuration" → "Table" → "Filters". Know more...

Outbound Campaign shows the filters created for Outbound campaigns, whereas Parallel Predictive Campaign shows the filters created for Parallel Predictve Campaigns. Similarly, Voice Blast Campaign shows the filters created for Voice Blast Campaigns.

Hover the mouse over icon to view the information for the selected table filter.

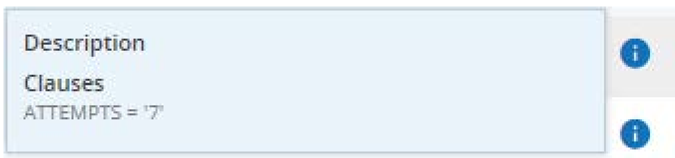


Figure: Filter Details

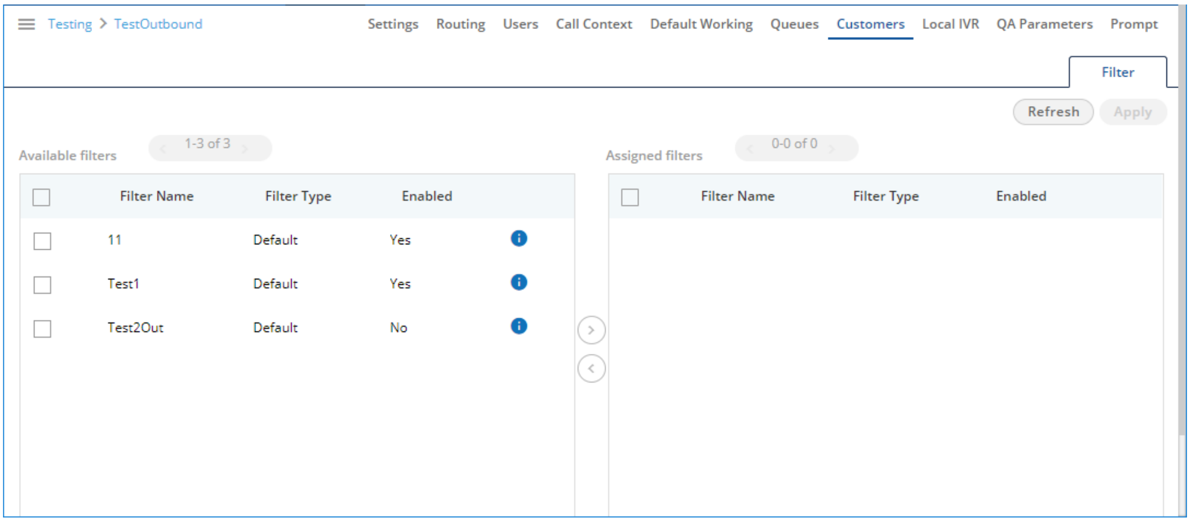


Figure: Customer Filter Settings

Perform the following steps to assign customer filters to this campaign.

1. Select the filters in "Available Filters" section
2. Click icon to proceed to assign the selected filters.

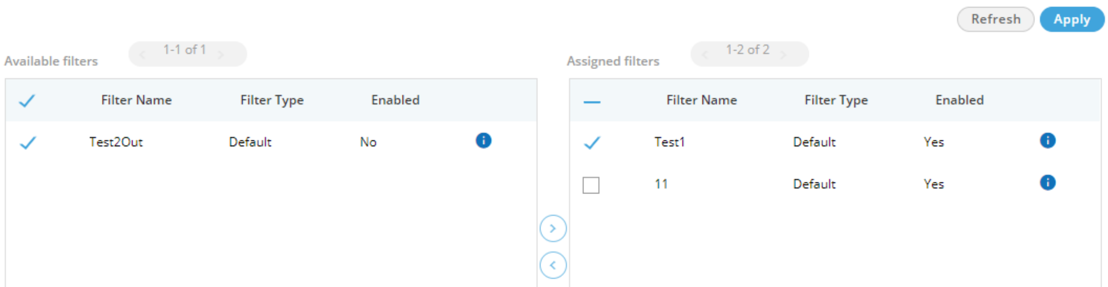


Figure: Assign or Unassign Customer Filters

3. Click "Apply" to assign the customer filters to this campaign.

   Rather, you can click "Refresh" to not assign the filters.

To unassign a customer filter, select it in "Assigned Filters" section, click icon, and click "Apply" to unassign the selected filter from the campaign.

10.6 Parallel Predictive Voice Campaign Settings

In the left navigation bar of Process Tab, you can select a Parallel Predictive Voice Campaign to view its settings.

The changes made in settings of one Parallel Predictve Voice Campaign will be applicable to that campaign itself. They will not be applicable on other similar (parallel) and different (non-parallel) campaigns.

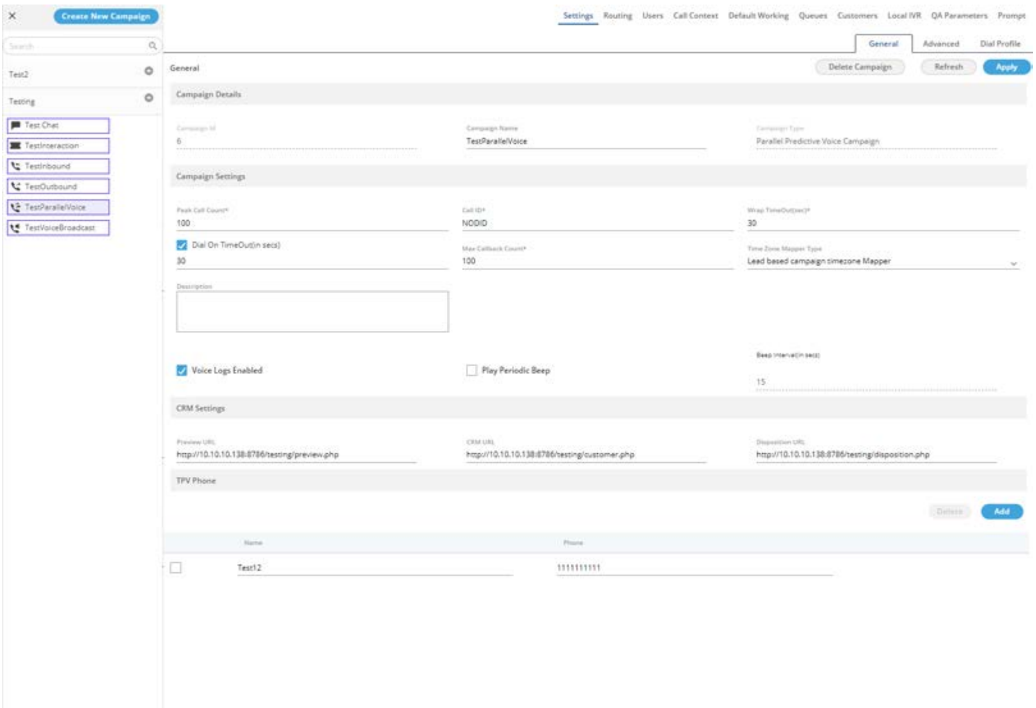


Figure: Settings of Parallel Predictive Voice Application Campaign

It contains the following tabs.

- Settings
  - General Settings
  - Advanced Settings
  - Dial Profile Settings
- Queues

- Routing
- Users
- Default Working
- Holiday/Office Hours
- Call Context
- Customers
- Local IVR
- QA Parameters
- Prompt

10.6.1 Settings of Interactive Voice Application Campaign

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

10.6.1.1 General Settings

Here, the General Settings are divided into the following sections.

-
- **Campaign Details:** These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.
- **Campaign Settings:** It contains the same settings, which you have configured while creating this campaign.
-
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
-
- **TPV Phone:** As per the process requirement, there may be a few numbers to which transfer of calls is very frequent. Third-party verification (TPV) number is used to transfer the call to verifier. Here, such frequently used TPV numbers are added so that the user can directly transfer the case to these numbers.

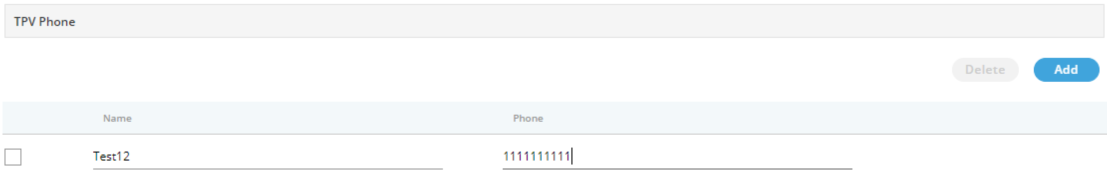


Figure: TPV Phone

Click "Add" to show a row to add TPV Phone number. Enter the name and phone number. You can add multiple TPV Numbers. To delete a TPV phone number, click its checkbox to select it and click "Delete".

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

- Click here to know more about the Campaign Details and CRM Settings for this campaign.
- After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

10.6.1.2 Advanced Settings

Here, the Administrator can configure the Advanced Settings of a Parallel Predictive Voice Campaign.

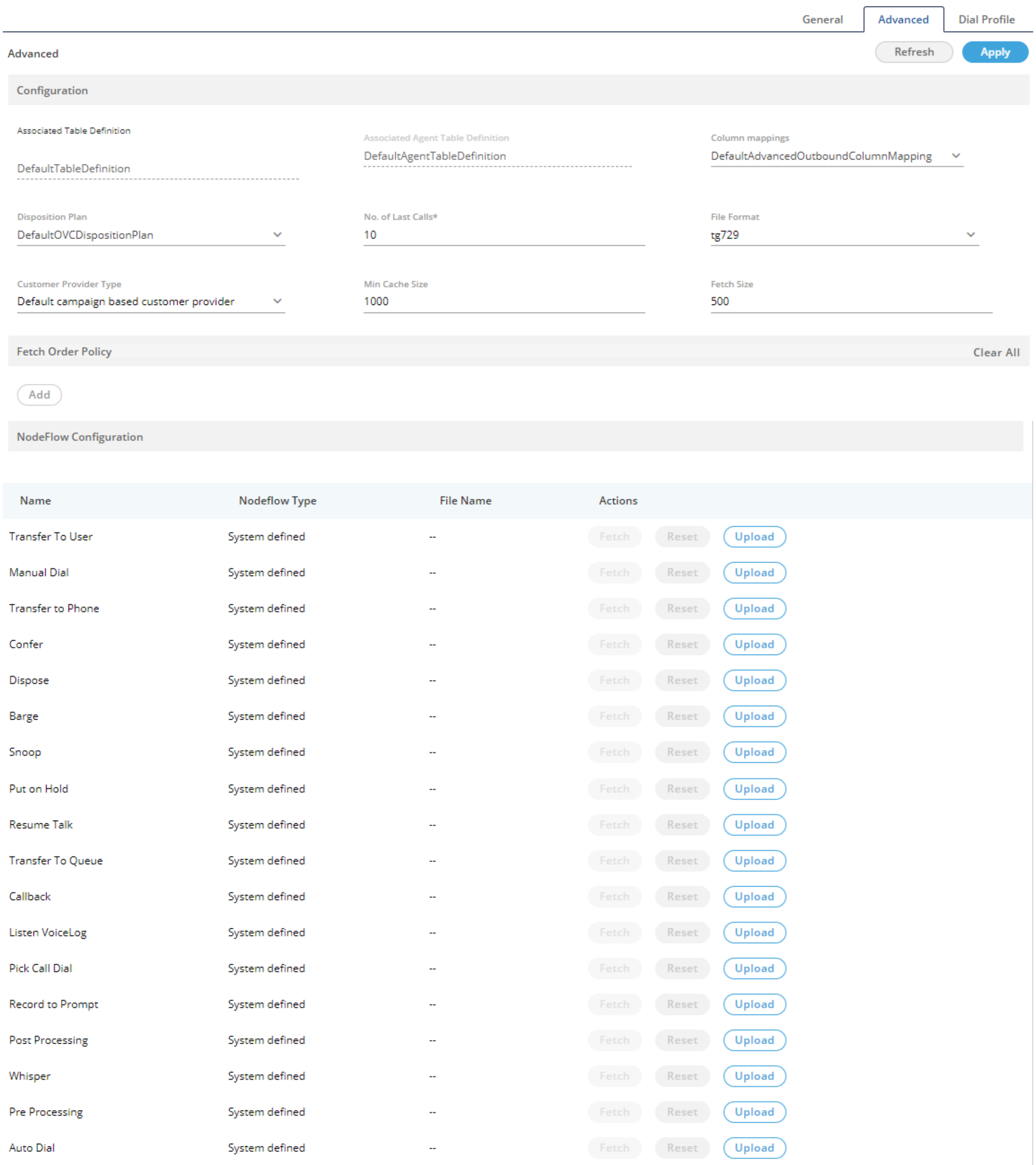


Figure: Advanced Settings

This tab can be divided into these sections - "Configuration", "Fetch Order Policy", and "NodeFlow Configuration".

-

- **Configuration:** Except the following, "Configuration" section contains those settings that you have already configured while creating this Parallel

Predictive campaign. You can change the values for Column Mappings, Disposition Plan, Number of Last Calls, and File Format.

-
- **Customer Provider Type:** Select the algorithm for the dialer to pick and dial the customers from the database.
    - Campaign Based Customer Provider: It is the default customer provider, which will fetch maximum possible numbers from the highest priority leads in one query. If numbers fetched are less than the required numbers, then it will also fetch numbers from the lower priority leads. Cache will not be maintained on per lead basis.
    - This provider will fallback to Lead Based Customer Provider in a Predictve Parallel Campaign.
    - Lead Based Customer Provider: It can be used to dial the numbers as per the lead priority. Customers with high priority will be dialed first, whereas customers with less priority will be dialed after it. If two leads have same priority numbers, then they will be selected for dialing as per their weights.
        -
        - Lead Based Customer Provider is the recommended for Parallel Predictve Dialer and Parallel Predictive Campaign.
        - It is recommended to maintain cache per lead in case of lead to queue mapping in a Parallel Predictive Campaign so that all the queues get enough numbers, if available.
        - This method is not recommended when lead leveling is not required.

- If large number of leads are enabled for a campaign and no lead leveling is required, then this method is not recommended. Else, the Campaign Based Customer Provider is recommended in such a scenario.

- PACE Based Customer Provider: It is the recommended method for a Parallel Predictive Campaign. Select it to enable the PACE.

  - **Minimum Cache Size:** Provide the minimum size for the cache that is the count of numbers that can be stored a time.
  - **Fetch Size:** Provide the count of numbers that can be fetched at a time.

▪

- **Fetch Order Policy:** Here, you have to add and define "Fetch Order Policy" to fetch the customers' numbers. Select any of the following policies.
  - **Customer Upload Time:** The customers to be dialed are selected as per the time of the uploading of their numbers to the campaigin. After selecting it, you can select ascending or descending order of the sorting the numbers.

Figure: "Customer Upload Time" Fetch Order Policy

In the ascending order, the customer whose number is uploaded very first will be dialed first and so on. In the descending order, the customer whose number is uploaded very last will be dialed first and so on.

  - **Randomized order of lead upload:** The customers to be dialed are selected randomly from the lead. The random algorithm to sort the values in the database is used.

- **Natural Order of Lead Upload:** The customers to be dialed are selected as per the same order as they are originally presented in the CSV file, which was uploaded.
- **Number of Attempts:** The customers to be dialed are selected as per the number of attempts made to dial their numbers. After selecting it, the administrator can select the Ascending or Descending order.

Figure: "Number of Attempts" Fetch Order Policy

- **Customer Information:** The customers to be dialed are selected as per the ascending or descending order of the values of any customer information field. After selecting it, the administrator has to select the customer information field as per which the customers to be dialed has to be selected.

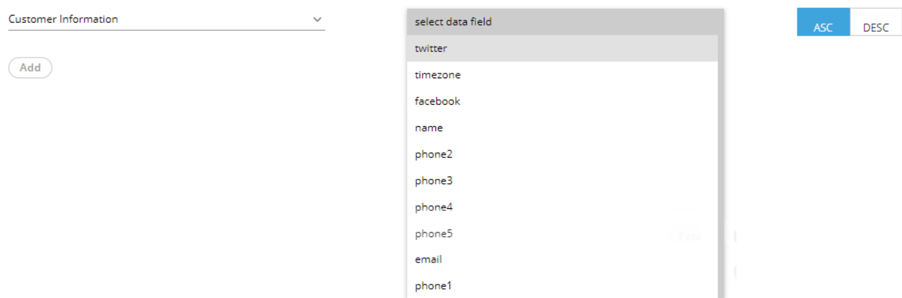


Figure: "Customer Information" Fetch Order Policy

After selecting the field, the administrator can opt for ascending or descending sorting.

- **CUSTOM :**Here, the Administrator can provide its own customized JavaScript code to create a customized order of selecting the customers to be dialed. Multiple conditions can be mixed using this method.
- **User Disposition Retry Time:** The customers to be dialed are selected as per the retry time attached to their disposition. After

selecting it, the administrator can select the Ascending or Descending order.

Figure: "User Disposition Retry Time" Fetch Order Policy

In Ascending order, those customers will be dialed first who has least disposition retry time. In descending order, those customers will be dialed first who has the highest disposition retry time.

-

- **NodeFlow Configuration:** It lets you upload the nodeflow for the different functions listed herein below.
    - Transfer to User
    - Manual Dial
    - Transfer to Phone
    - Confer
    - Dispose
    - Barge
    - Snoop
    - Put on Hold
    - Resume Talk
    - Transfer to Queue
    - Callback
    - Listen VoiceLog
    - Pick Call Dial
    - Record to Prompt
    - Post Processing

- o Whipser
- o Pre Processing
- o Auto Dial

10.6.1.3 Dial Profile Settings

Here, the Administrator can create the dial profiles for this campaign using the Routing Plans. So, it is necessary to create the Routing Plans first before configuring this tab.

Before creating a routing plan, you have to assign and manage the users, assign the call contexts, and create the queues.

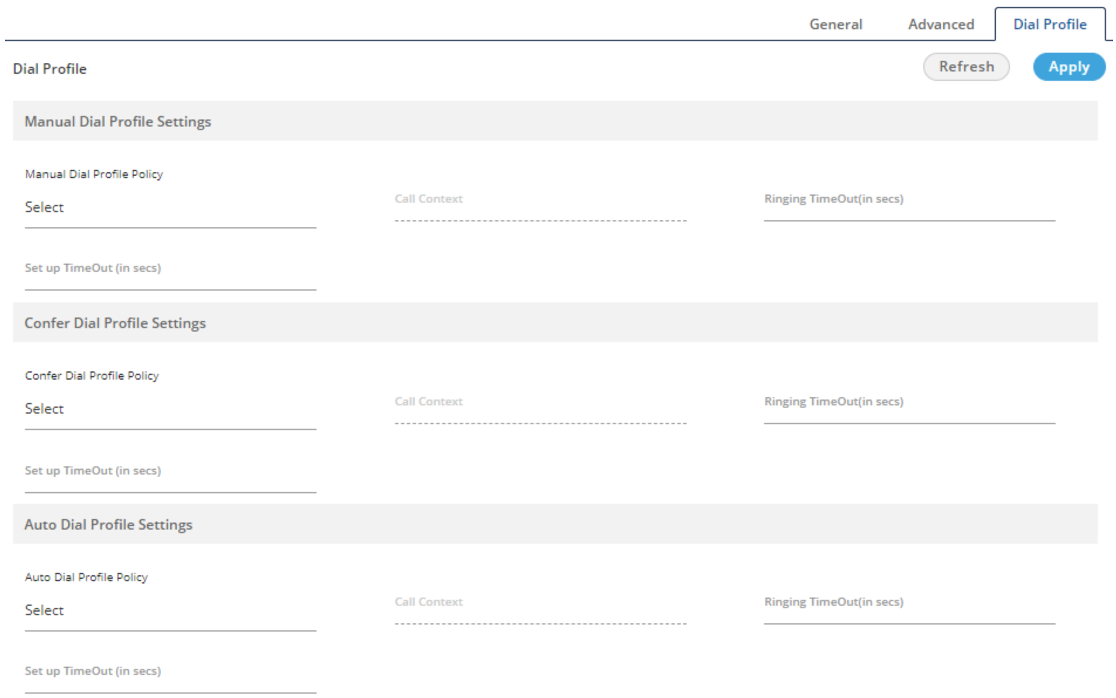


Figure: Dial Profile Settings

Perform the following steps to configure the Dial Profile Settings for Manual Dial, Confer Dial (Conference Dial), and Auto Dial.

-

1. **Manual Dial Profile Settings:** It lets you configure the settings for Manual Dial Profile. Perform the following steps.

A. "Manual Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".

B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds

C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

2. **Confer Dial Profile Settings:** It lets you configure the settings for Confer Dial (Dial during Conference) Profile. Perform the following steps.

   A. "Confer Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".

   B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds

   C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

3. **Auto Dial Profile Settings:** It lets you configure the settings for Auto Dial Profile. Perform the following steps.

   A. "Auto Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".

   B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call.

Provide a value in seconds for the same. The default value is 30 seconds

C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

4. Click "Apply" to apply the dial profile for any section.

   Rather, you can click "Refresh" to discard the changes.

When you click apply, the values for Call Context for the selected Policy is populated in "Call Context" column.

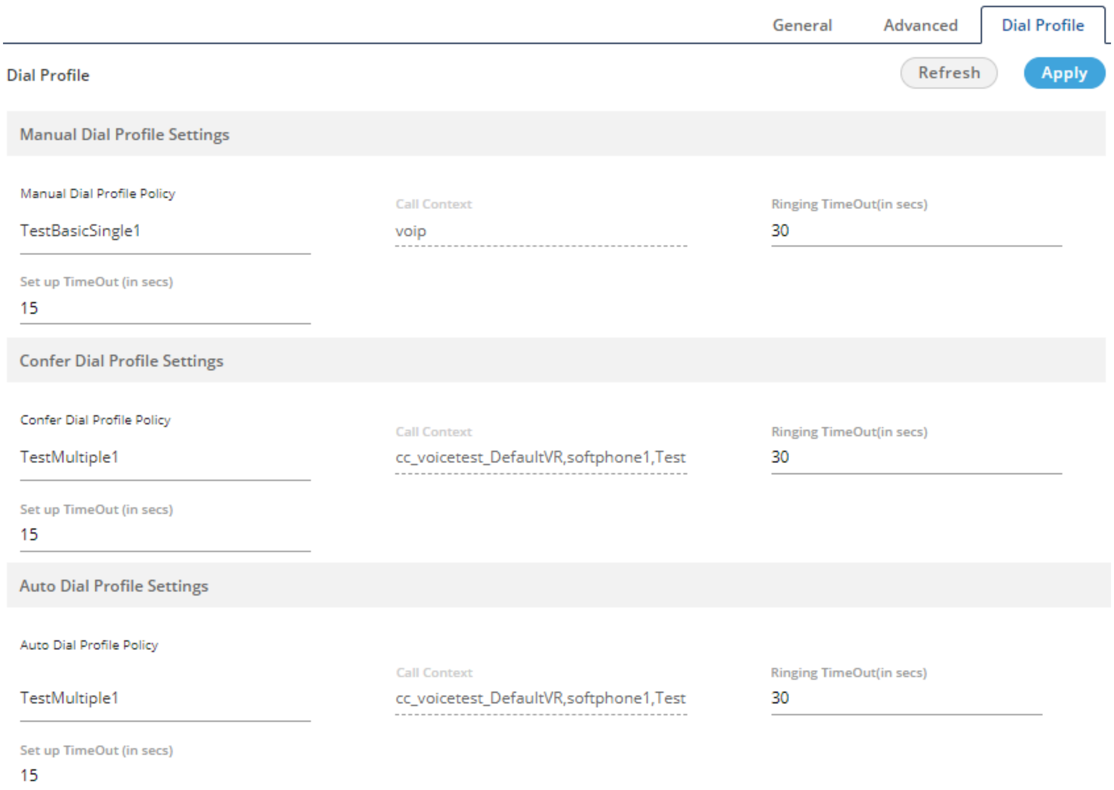


Figure: Configured Dial Profile Settings

10.6.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the Chat Campaign Settings. Know more...

10.6.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the Chat Campaign Settings. Know more...

10.6.4 Default Working

Here, you can select the users who will be logged in to this campagin, by default, and will not receive the prompt to select the campaign. This tab has already been explained in the Chat Campaign Settings. Know more...

10.6.5 Holiday/Office Hours

Here, you can define the holidays, office hours, and non-working hours for this campaign. This tab has already been explained in "System Configuration". Know more...

10.6.6 Call Context

Here, you can define the call contexts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.6.7 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.6.8 Local IVR

Here, you can create the Local IVRs for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.6.9 QA Parameters

Here, you can assign or unassign the QA Parameters to this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.6.10 Prompt

Here, you can create and manage the Voice Prompts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.6.11 Customer Filter

Here, you can assign and unassign the customer filters in this campaign. This tab has already been explained in "Outbound Voice Campaign". Know more...

10.7 Voice Blast Campaign Settings

In the left navigation bar of Process Tab, you can select a Voice Blast Campaign to view its settings.

The changes made in settings of one Parallel Predictve Voice Campaign will be applicable to that campaign itself. They will not be applicable on other similar (voice blast) and different (non-voice blast) campaigns.

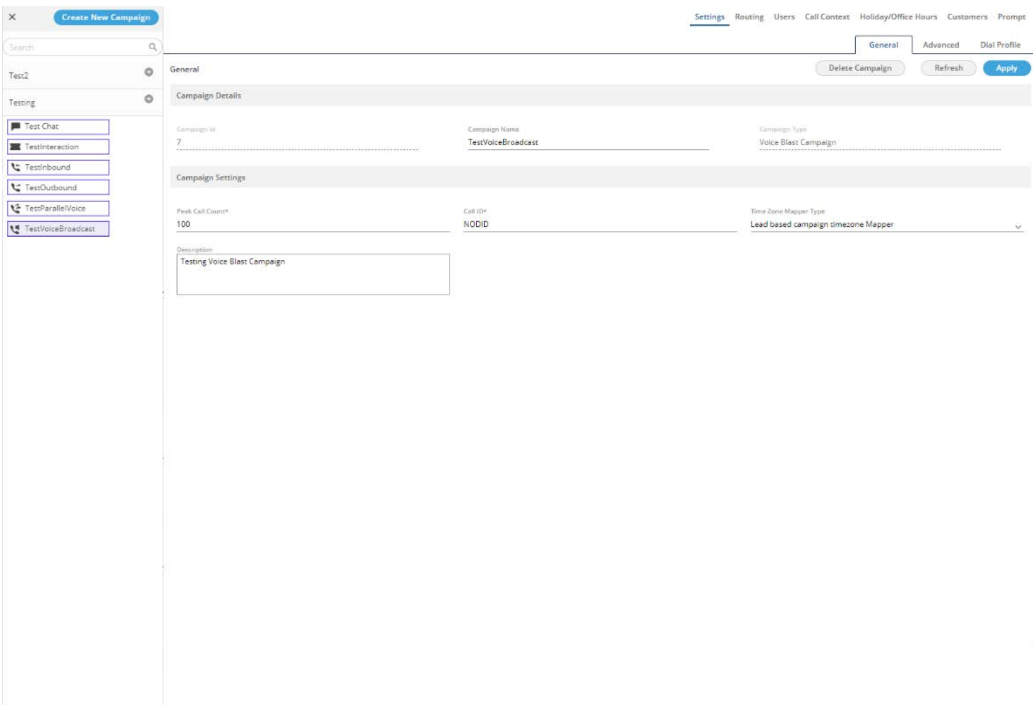


Figure: Settings of Voice Blast Campaign

It contains the following tabs.

- Settings
    - General Settings
    - Advanced Settings
    - Dial Profile Settings
- Queues
- Routing
- Users
- Holiday/Office Hours
- Call Context
- Customers
- Prompt

10.7.1 Settings of Interactive Voice Application Campaign

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

10.7.1.1 General Settings

Here, the General Settings are divided into the following sections.

- **Campaign Details:** These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.
- **Campaign Settings:** It contains the same settings, which you have configured while creating this campaign.
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- **TPV Phone:** As per the process requirement, there may be a few numbers to which transfer of calls is very frequent. Third-party verification (TPV) number is used to

transfer the call to verifier. Here, such frequently used TPV numbers are added so that the user can directly transfer the case to these numbers.

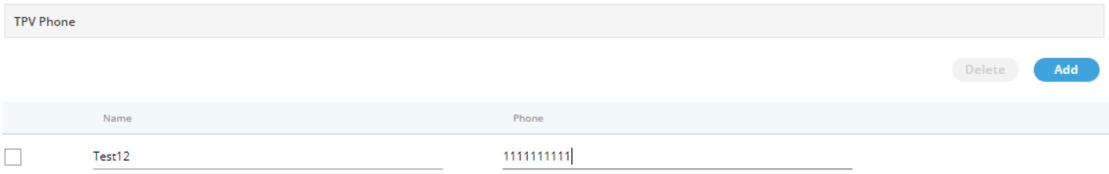


Figure: TPV Phone

Click "Add" to show a row to add TPV Phone number. Enter the name and phone number. You can add multiple TPV Numbers. To delete a TPV phone number, click its checkbox to select it and click "Delete".

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

- Click here to know more about the Campaign Details and CRM Settings for this campaign.
- After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

10.7.1.2 Advanced Settings

Here, the Administrator can configure the Advanced Settings of a Voice Blast Campaign.

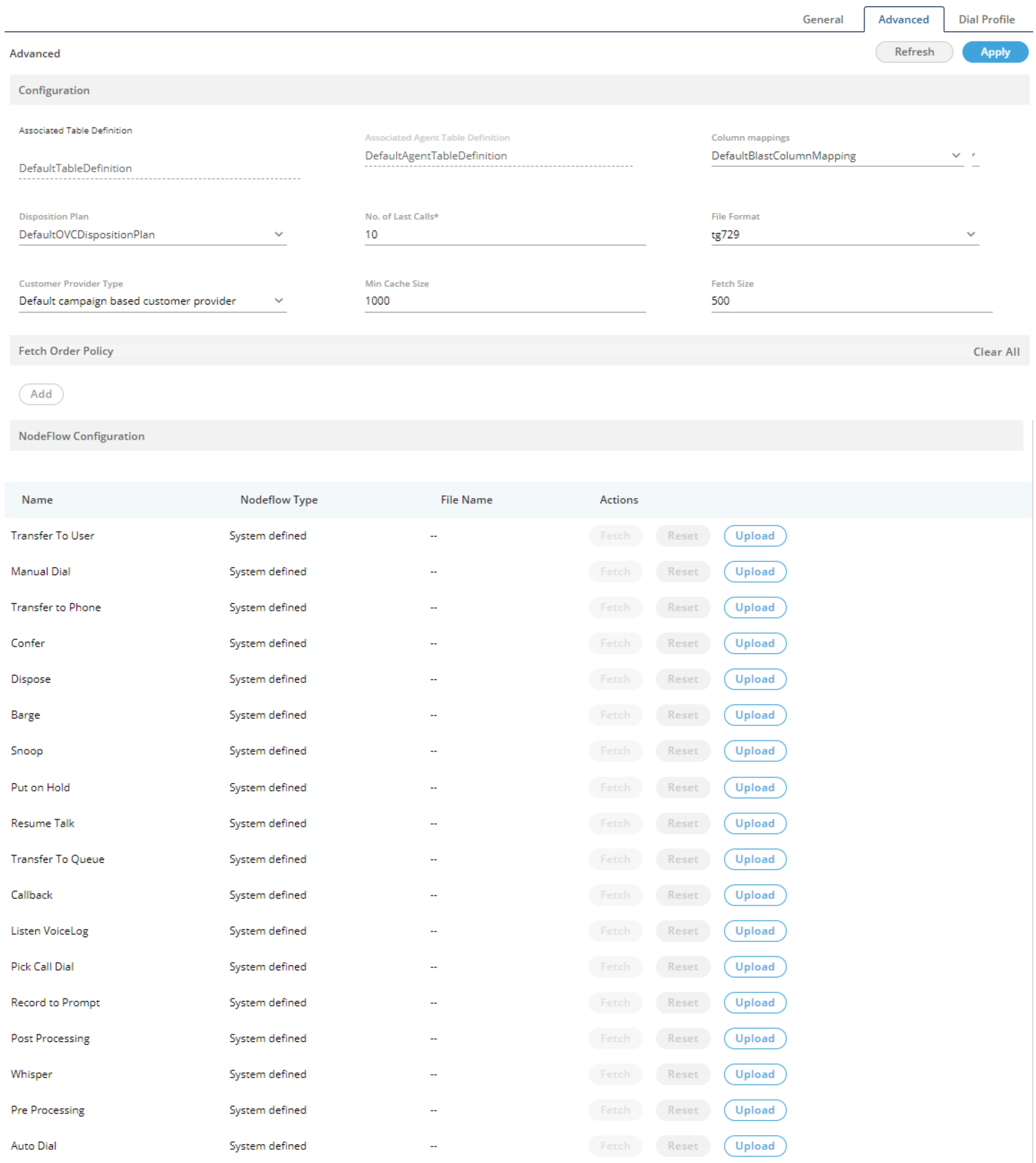


Figure: Advanced Settings

This tab can be divided into these sections - "Configuration", "Fetch Order Policy", and "NodeFlow Configuration".

-
- **Configuration:** Except the following, "Configuration" section contains those settings that you have already configured while creating this Parallel

Predictive campaign. You can change the values for Column Mappings, Disposition Plan, Number of Last Calls, and File Format.

- **Customer Provider Type:** Select the algorithm for the dialer to pick and dial the customers from the database.
    - Campaign Based Customer Provider: It is the default customer provider, which will fetch maximum possible numbers from the highest priority leads in one query. If numbers fetched are less than the required numbers, then it will also fetch numbers from the lower priority leads. Cache will not be maintained on per lead basis.
    - This provider will fallback to Lead Based Customer Provider in a Predictve Parallel Campaign.
    - Lead Based Customer Provider: It can be used to dial the numbers as per the lead priority. Customers with high priority will be dialed first, whereas customers with less priority will be dialed after it. If two leads have same priority numbers, then they will be selected for dialing as per their weights.
        - Lead Based Customer Provider is the recommended for Parallel Predictve Dialer and Parallel Predictive Campaign.
        - It is recommended to maintain cache per lead in case of lead to queue mapping in a Parallel Predictive Campaign so that all the queues get enough numbers, if available.
        - This method is not recommended when lead leveling is not required.

- If large number of leads are enabled for a campaign and no lead leveling is required, then this method is not recommended. Else, the Campaign Based Customer Provider is recommended in such a scenario.

- PACE Based Customer Provider: It is the recommended method for a Parallel Predictive Campaign. Select it to enable the PACE.

  - **Minimum Cache Size:** Provide the minimum size for the cache that is the count of numbers that can be stored a time.
  - **Fetch Size:** Provide the count of numbers that can be fetched at a time.

- **Fetch Order Policy:** Here, you have to add and define "Fetch Order Policy" to fetch the customers' numbers. Select any of the following policies.

  - **Customer Upload Time:** The customers to be dialed are selected as per the time of the uploading of their numbers to the campaigin. After selecting it, you can select ascending or descending order of the sorting the numbers.

Figure: "Customer Upload Time" Fetch Order Policy

In the ascending order, the customer whose number is uploaded very first will be dialed first and so on. In the descending order, the customer whose number is uploaded very last will be dialed first and so on.

  - **Randomized order of lead upload:** The customers to be dialed are selected randomly from the lead. The random algorithm to sort the values in the database is used.

- **Natural Order of Lead Upload:** The customers to be dialed are selected as per the same order as they are originally presented in the CSV file, which was uploaded.
- **Number of Attempts:** The customers to be dialed are selected as per the number of attempts made to dial their numbers. After selecting it, the administrator can select the Ascending or Descending order.

Figure: "Number of Attempts" Fetch Order Policy

- **Customer Information:** The customers to be dialed are selected as per the ascending or descending order of the values of any customer information field. After selecting it, the administrator has to select the customer information field as per which the customers to be dialed has to be selected.

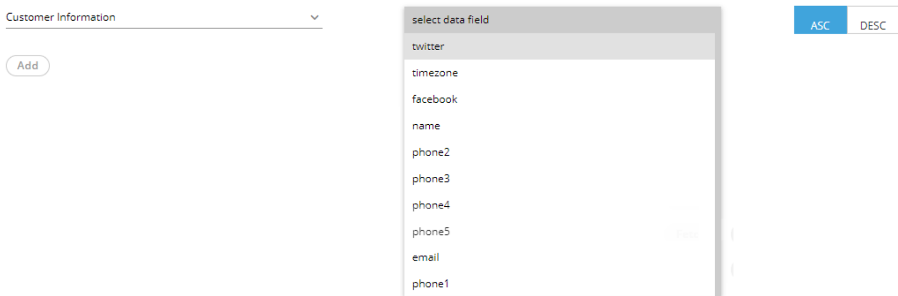


Figure: "Customer Information" Fetch Order Policy

After selecting the field, the administrator can opt for ascending or descending sorting.

- **CUSTOM :**Here, the Administrator can provide its own customized JavaScript code to create a customized order of selecting the customers to be dialed. Multiple conditions can be mixed using this method.
- **User Disposition Retry Time:** The customers to be dialed are selected as per the retry time attached to their disposition. After

selecting it, the administrator can select the Ascending or Descending order.

Figure: "User Disposition Retry Time" Fetch Order Policy

In Ascending order, those customers will be dialed first who has least disposition retry time. In descending order, those customers will be dialed first who has the highest disposition retry time.

- **<u>NodeFlow Configuration</u>:** It lets you upload the nodeflow for the different functions listed herein below.
  - Transfer to User
  - Manual Dial
  - Transfer to Phone
  - Confer
  - Dispose
  - Barge
  - Snoop
  - Put on Hold
  - Resume Talk
  - Transfer to Queue
  - Callback
  - Listen VoiceLog
  - Pick Call Dial
  - Record to Prompt
  - Post Processing

- Whipser
- Pre Processing
- Auto Dial

10.7.1.3 Dial Profile Settings

Here, the Administrator can create the dial profiles for this campaign using the Routing Plans. So, it is necessary to create the Routing Plans first before configuring this tab.

Before creating a routing plan, you have to assign and manage the users, assign the call contexts, and create the queues.

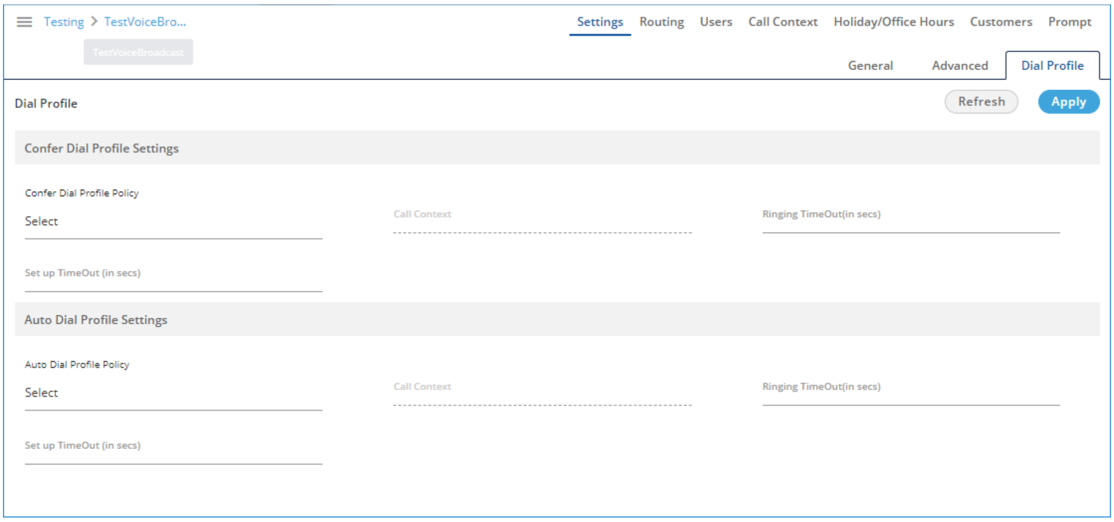


Figure: Dial Profile Settings

Perform the following steps to configure the Dial Profile Settings for Confer Dial (Conference Dial) and Auto Dial.

-

1. **<u>Confer Dial Profile Settings</u>:** It lets you configure the settings for Confer Dial (Dial during Conference) Profile. Perform the following steps.

   A. "Confer Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".

B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds

C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

2. **Auto Dial Profile Settings:** It lets you configure the settings for Auto Dial Profile. Perform the following steps.

    A. "Auto Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".

    B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds

    C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

3. Click "Apply" to apply the dial profile for any section.
   Rather, you can click "Refresh" to discard the changes.

When you click apply, the values for Call Context for the selected Policy is populated in "Call Context" column.

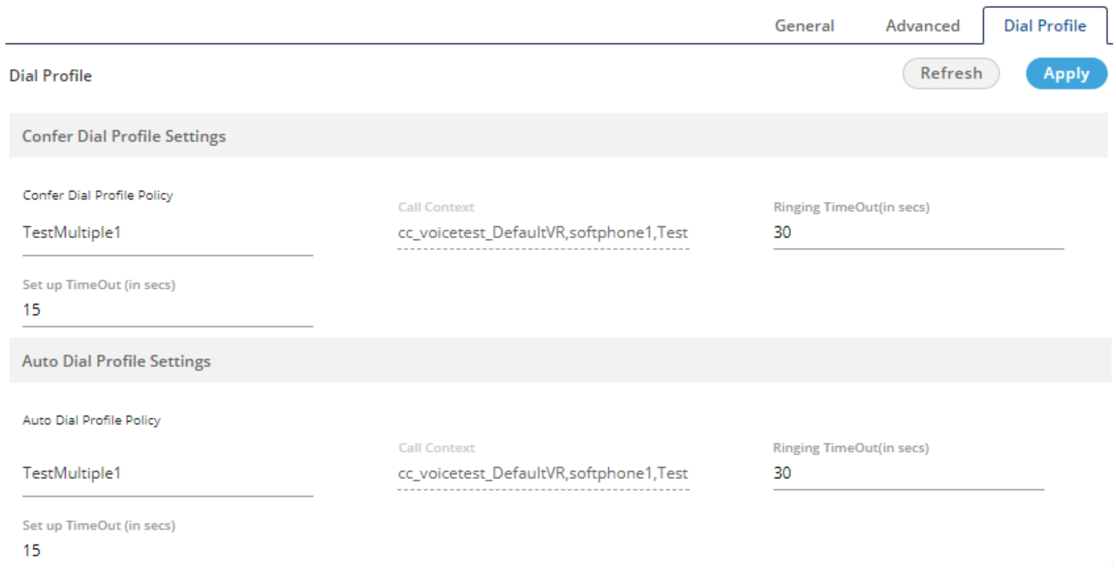


Figure: Configured Dial Profile Settings

10.7.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the Chat Campaign Settings. Know more...

10.7.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the Chat Campaign Settings. Know more...

10.7.4 Holiday/Office Hours

Here, you can define the holidays, office hours, and non-working hours for this campaign. This tab has already been explained in "System Configuration". Know more...

10.7.5 Call Context

Here, you can define the call contexts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.7.6 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.7.7 Prompt

Here, you can create and manage the Voice Prompts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

10.7.8 Customer Filter

Here, you can assign and unassign the customer filters in this campaign. This tab has already been explained in "Outbound Voice Campaign". Know more...

11. Delete a Campaign

Deleted campaign cannot be restored. The functionality like incoming call, outgoing call, interactions, or chat and its specific configuration will also be deleted. The users assigned to the campaign cannot attend any customer communication that you have configured in that campaign until they are asssigned to a new campaign.

Perform the following steps to delete a campaign.

1. In the left navigation bar, select the campaign that you want to delete.
2. Click "Delete Campaign" button on top right corner to delete the campaign. It shows the following message.

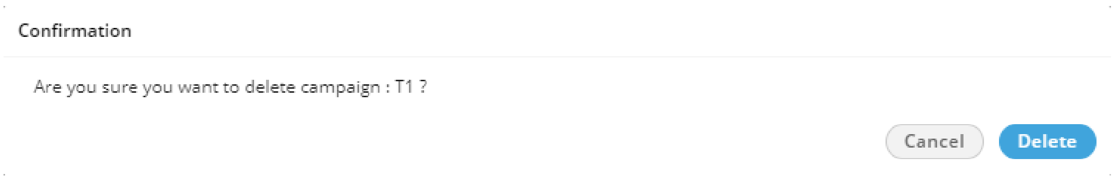


Figure: Deletion Confirmation Message

3. Click "Delete" to delete the campaign.

   Rather, you can click "No" to not delete the campaign.

12. Administrator Logout

Click the user account menu on top-right corner and click "Logout" to logout from the Administrator Console.