Administrator Manual of Ameyo 4.11 GA

Table of Contents

1. Document Versioning

Version	Date	Purpose	Author
4.11.1-AdM	07-Jan-2021	First Draft	Saurabh Goyal

2. 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 and login credentials to login to the Ameyo.

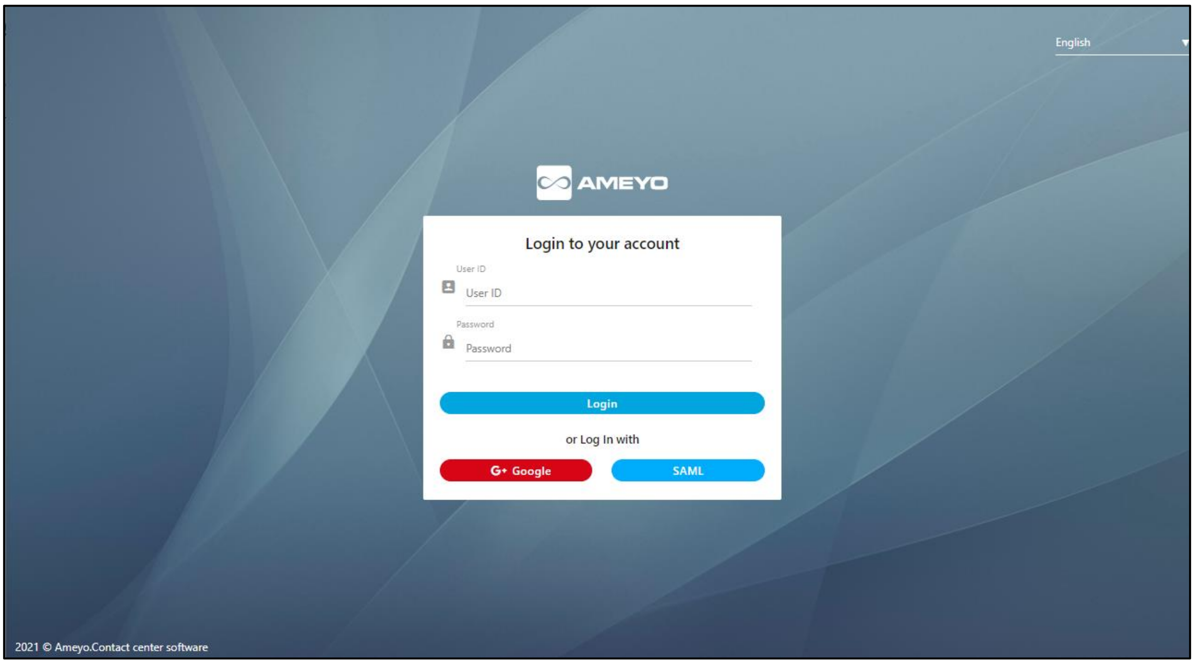


Figure: Login Screen

Administrator can perform the following two tasks on the login page.

1. **Language Selection:** Administrator can change the language to any other language, by default the English are selected as the Ameyo's language.

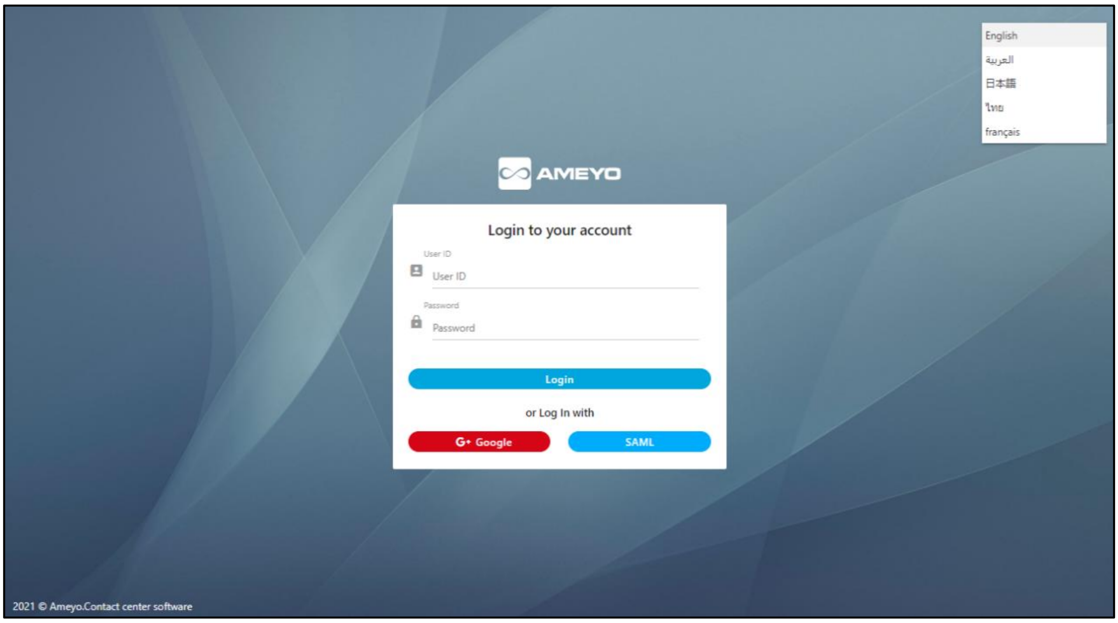


Figure: Change Language on Login Screen

Select the language from the drop-down menu present in the right side of the page to change the language.

Following languages are available for Ameyo.

A. English

B. French

C. Thai

D. Arabic

E. Japanese

F. Deutsch

G. Turkish

For more information on Ameyo supported languages, click here.

If administrator changes the language to another language, that does not impact the language change for the other users. Every user has to change the language from the drop-down list of languages.

2. Login to Ameyo.

A. **Normal Login:** The Administrator needs to enter the "User ID" and "Password" for Ameyo and click **"Login"**.

B. **Login with SAML (Licensable):** 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 (Licensable):** The Administrator can also login using its Google account. The businesses have to configure the Ameyo System using their Google Business (G Suite) Account to allow only their staff to login.

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

3. Administrator Console

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

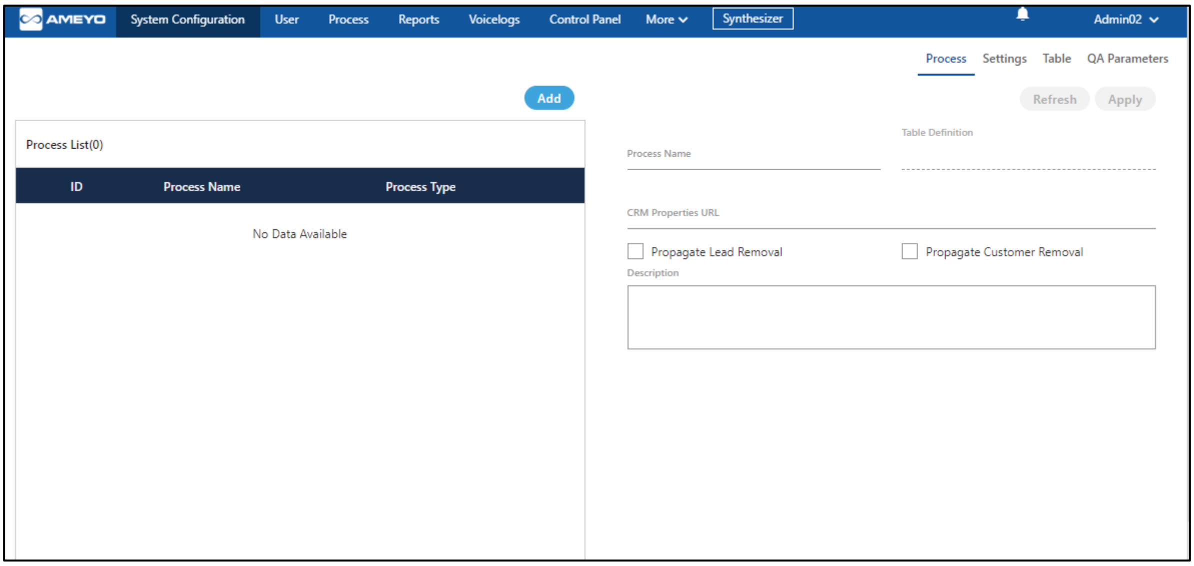


Figure: Ameyo Administrator Workbench

4. Quick Startup Guides

4.1 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**

4.2 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 Agent Table Definition

- Create Users (Mandatory)
- Configure Chat Themes (Optional)
- Create a Chat Campaign
- Configure Agent Table Definition at Campaign-level
- Manage Dispositions (Optional)
- Manage Holiday/Office Hours (Optional)
- Configure Chat Campaign Settings

4.3 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 Agent Table Definition
- 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 Agent Table Definition at Campaign-level
- Configure Interaction Campaign Settings

4.4 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 Agent Table Definition

- 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.
- Configure Agent Table Definition at Campaign-level
- Manage Exclusions at System-level (Optional)
- Manage Voicemail Prompts at System-level (Optional)
- Create and Manage Rules (Optional)
- Configure Call Manager (Mandatory)
- Configure Interactive Voice Application Campaign Settings

4.5 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)
  OR

  Create Table Filter Group to filter Customers (Optional)
- Configure System Settings
- Create Mapping Policies
- Create Agent Table Definition
- Create QA Parameters
- Create Process
- Create Users (Mandatory)
- Create an Outbound Voice Campaign
- Create Customer Distribution Rules
- 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.
- Configure Agent Table Definition at Campaign-level
- Manage Exclusions at System-level (Optional)
- Manage Voicemail Prompts at System-level (Optional)
- Create and Manage Rules (Optional)
- Configure Call Manager (Mandatory)
- Configure Outbound Voice Campaign Settings

4.6 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)
  OR

  Create Table Filter Group to filter Customers (Optional)
- Configure System Settings
- Create Mapping Policies

- Create Agent Table Definition
- Create QA Parameters
- Create Process
- Create Users (Mandatory)
- Create a Parallel Predictive Voice Campaign
- Create Customer Distribution Rules
- 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.
- Configure Agent Table Definition at Campaign-level
- Manage Exclusions at System-level (Optional)
- Manage Voicemail Prompts at System-level (Optional)
- Create and Manage Rules (Optional)
- Configure Call Manager (Mandatory)

- Configure Parallel Predictive Voice Campaign Settings

4.7 Quick Startup Guide for Voice Blast Campaign

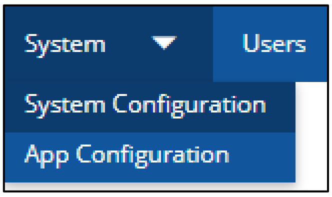
Go through the following pages one-by-one to create and manage a Voice Blast Campaign.

- Create Table Definition (Optional)
- Create Table Column Mapping (Optional)
- Create Table Filters to filter Customers (Optional)
- Configure System Settings
- Create Agent Table Definition
- 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.
- Configure Agent Table Definition at Campaign-level
- Manage Exclusions at System-level (Optional)
- Manage Voicemail Prompts at System-level (Optional)
- Create and Manage Rules (Optional)
- Configure Call Manager (Mandatory)
- Configure Voice Blast Campaign Settings

5. 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.

5.1 System Configuration

5.1.1 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
  - System Settings
  - Ticket Settings
  - Mapping Policies
- Table
  - Table Definition
  - Agent Table Definition
  - Mapping Policies
  - Filter
  - Filter Groups
- QA Parameters

5.1.1.1 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.

5.1.1.2 System Settings After Creating Campaigns

Some System Settings are available only after creating the different types of campaigns. Refer to the following page to know more.

- System Settings after Creating Campaigns

5.1.2 Process in System Configuration

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 screenshot of "Process Tab".

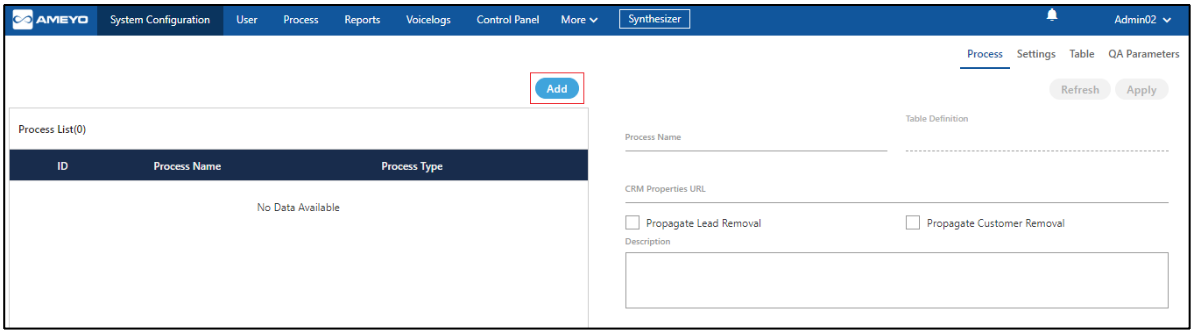


Figure: Process Tab

5.1.2.1 Create a Process

Perform the following steps to create a process.

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

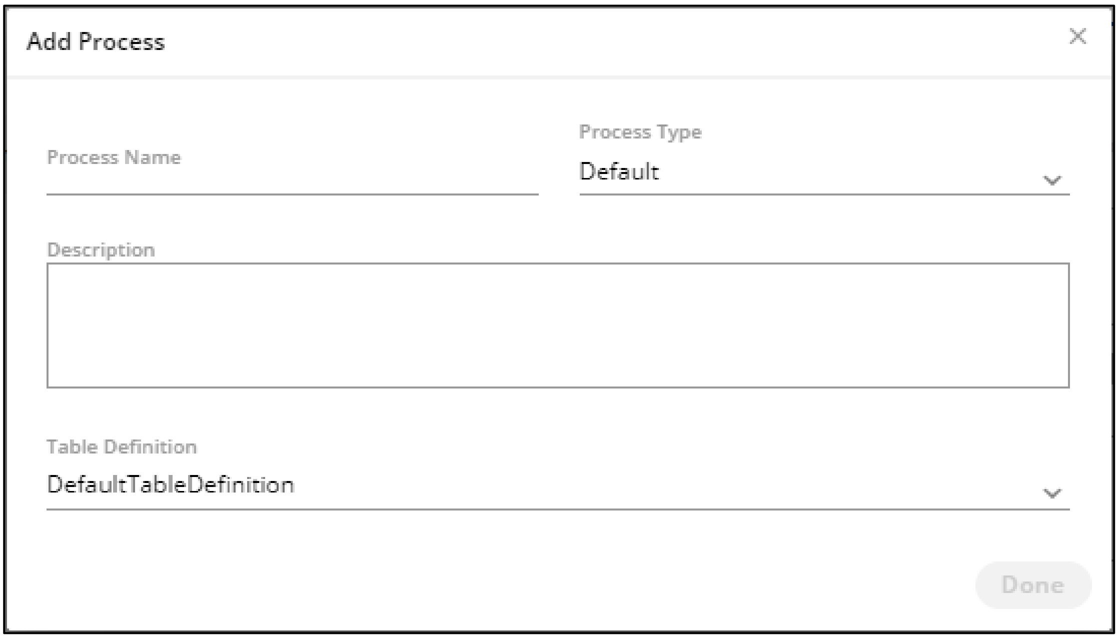


Figure: Create Process

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.

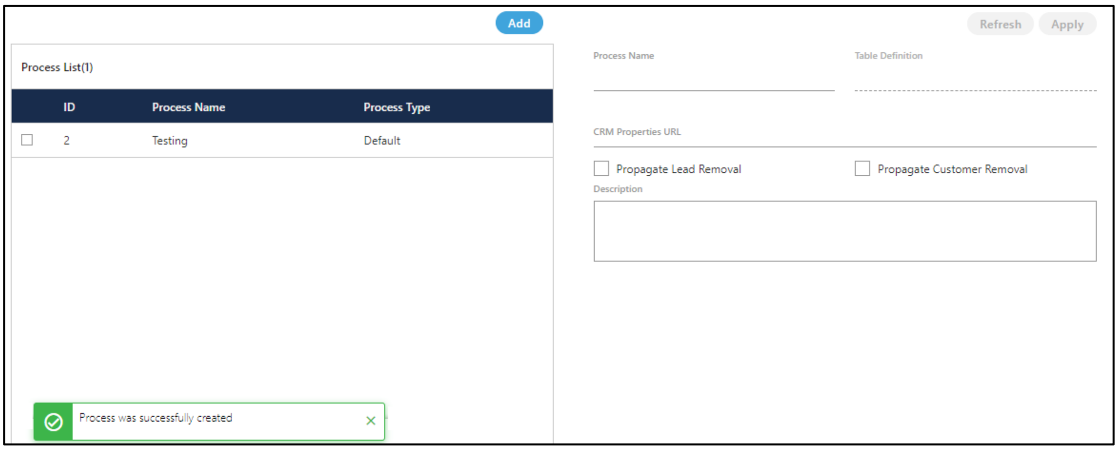


Figure: Created a Process

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

5.1.2.2 Modify a Process

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.

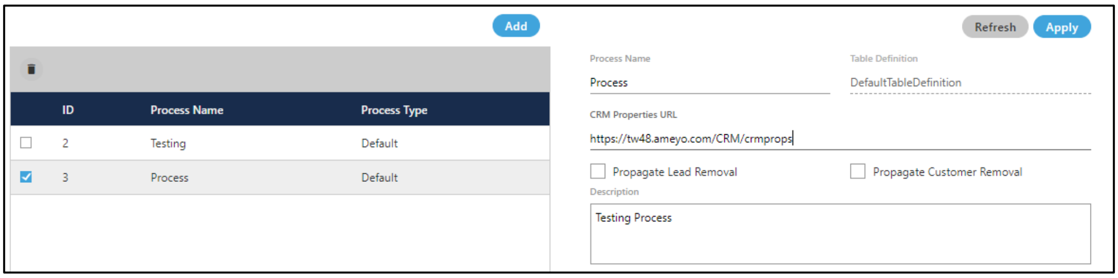


Figure: Modify a Process

2. You can change the Process Name here as well. Provide the new name of the process in the Process Name field.
3. 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. For example, the following URL can be added for a local AppServer.

      http://<IP_Address_Domain_AppServer>:8786/<CRM_Name>/crmprops

      Replace <IP_Address_Domain_AppServer> with the IP Address or the domain name of the URL where CRM is hosted.

      If VAPT setup is configured in Ameyo then the CRM URL will be:

http://<IP_Address_Domain_AppServer>:8786/<CRM_Name>/crmprops.php
Replace **http** with **https**, if CRM is configured on secure setup website.

B. **Propagate Lead Removal:** If supervisor deletes any lead from Ameyo, then all the numbers get deleted from ameyo database, but they remain available in the CRM database. If you want to delete those numbers from CRM database as well, then enable Propagate Lead Removal checkbox.

C. **Propagate Customer Removal:** If supervisor deletes any customer's number from the uploaded lead, then it gets removed from ameyo database but it remains available in the CRM database. If you want to delete the number from CRM database also, then enable Propagate Customer Removal checkbox.

4. Click "Apply" to apply the changes. Whereas, click "Refresh" button to discard the changes.

In the edit option, you can not change the Table Definition for the process. The table definition can only be defined at the time of the process creation.
If, still you want to change the Table Definition, then delete the process first and create a new process with the other required Table Definition.

5.1.2.3 Delete a Process

Administrator can delete any process by following below steps.

1. Select the process that needs to be deleted.

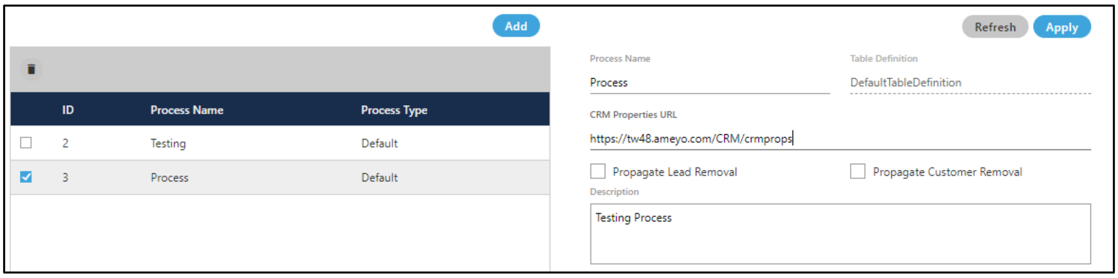


Figure: Delete Process

2. Click icon. 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.

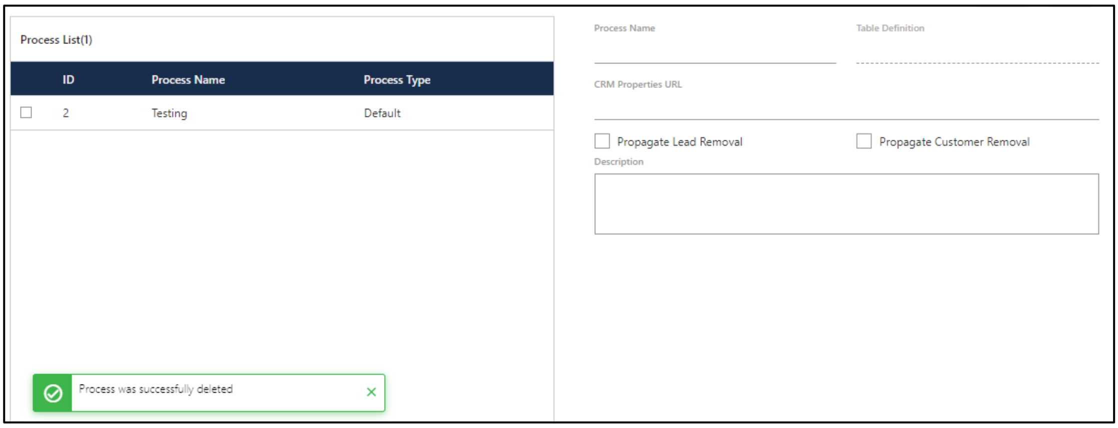


Figure: Deleted a Process

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

5.1.3 Settings in System Configuration

5.1.3.1 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

Click the links to know more about these settings.

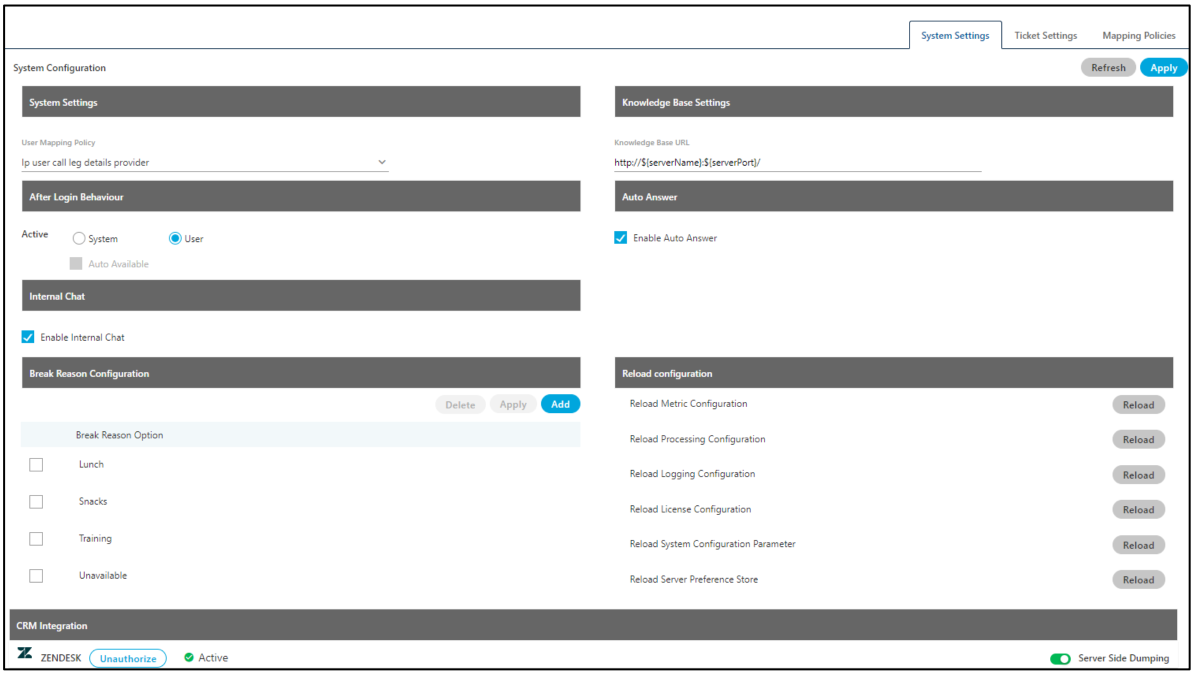


Figure: Settings Tab → System Settings

5.1.3.2 System Settings Tab

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

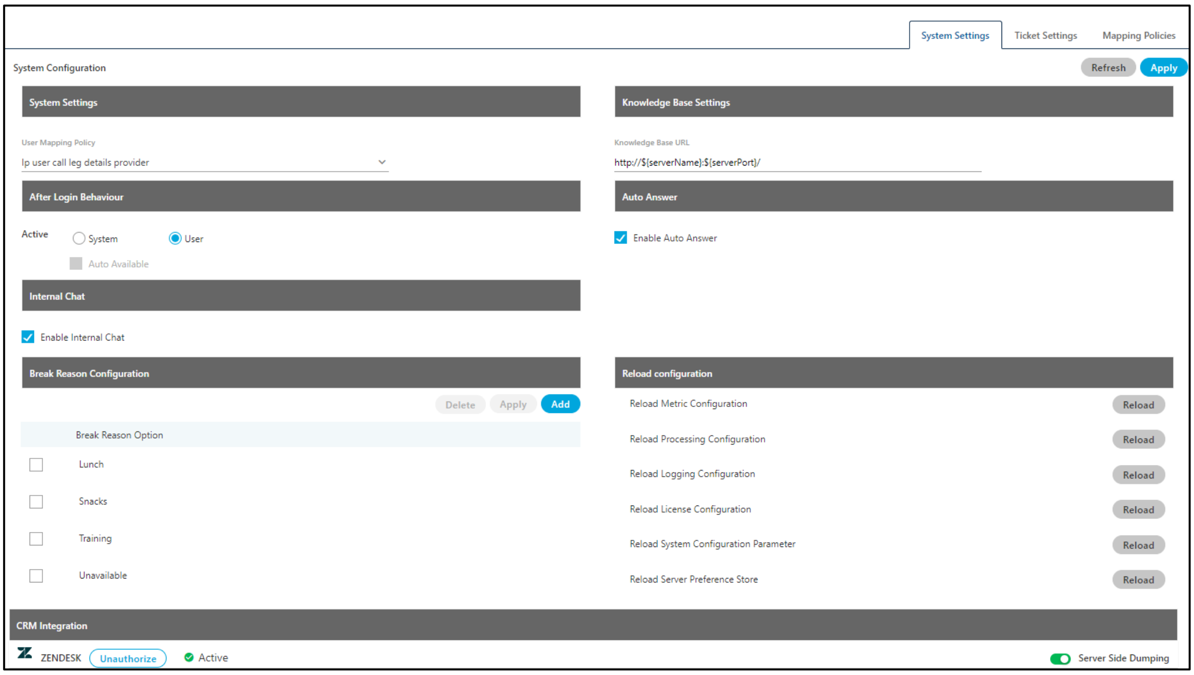


Figure: Settings Tab → System Settings

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.

   Make sure to enable the Call Manager at the backend and configure voice resource and call contexts in it before configuring User Mapping Policies. Know more...

   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. The view of "Mapping Policy" tab will be changed for every user mapping policy selected here.

I. **IP multiple user call leg details provider (Licensable):** 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.

II. **Userid mapped Call leg Details provider (Licensable):** Select it define the default extensions for the selected users. The selected users will not be asked to select the extensions after selecting the campaigns at their logon. After selecting this option, you have to browse "Mapping Policy Tab" to select the default single or multiple extensions for the users.

III. **User ID based call leg details provider (Licensable):** 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. After selecting this policy, the following option is displayed just below it.

Figure: Option to select Extension if WebRTC is not available

You have to configure WebRTC also to use this mapping policy.
Reference Document: https://sites.google.com/a/ameyo.com/engineering/media-pages/webrtc-knowledge-base/webphone---webrtc-softphone

Select this option to let the system select any Extension if WebRTC is not available.

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

V. **IP user call leg details provider (Licensable):** Select it 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.

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 "Knowledge 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" box.

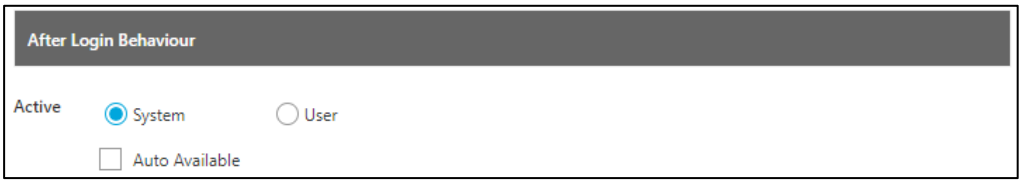


Figure: System Auto-Available Option

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

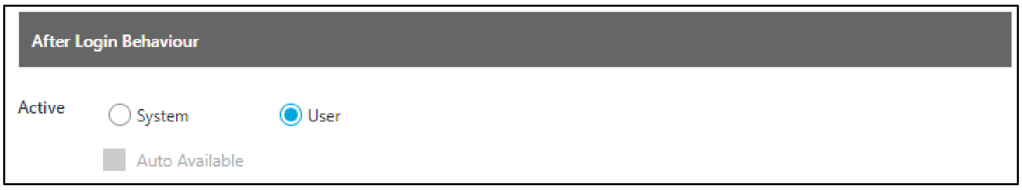


Figure: User Available Option

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. **(Licensable) 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 communicate with each other. A static chat icon will be displayed on the bottom right corner of the interface of every user.

   This feature is licensable, hence for further information on the same, contact Support team of Ameyo.

5. **(Licensable) 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.

   This feature is licensable, hence for further information on the same, contact Support team of Ameyo.

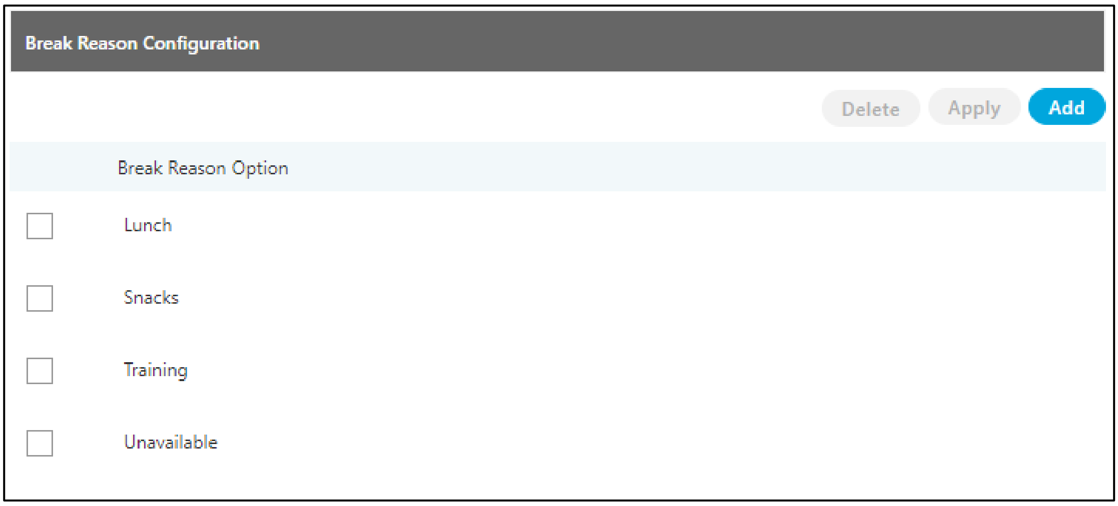


Figure: Break Reason Configuration

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.

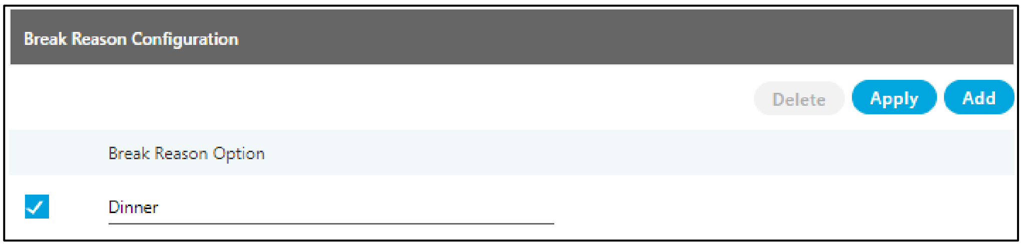


Figure: Add a Break Reason

Character Limit Information: Character Limit for the Name of the Break Reason is 30 characters. Also, (-) hyphen can be used as the special character. It means that the Break Reason can include maximum to 30 characters including alphabets, numbers, and only (-) hyphen as the special character.

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 modify a break reason. 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.

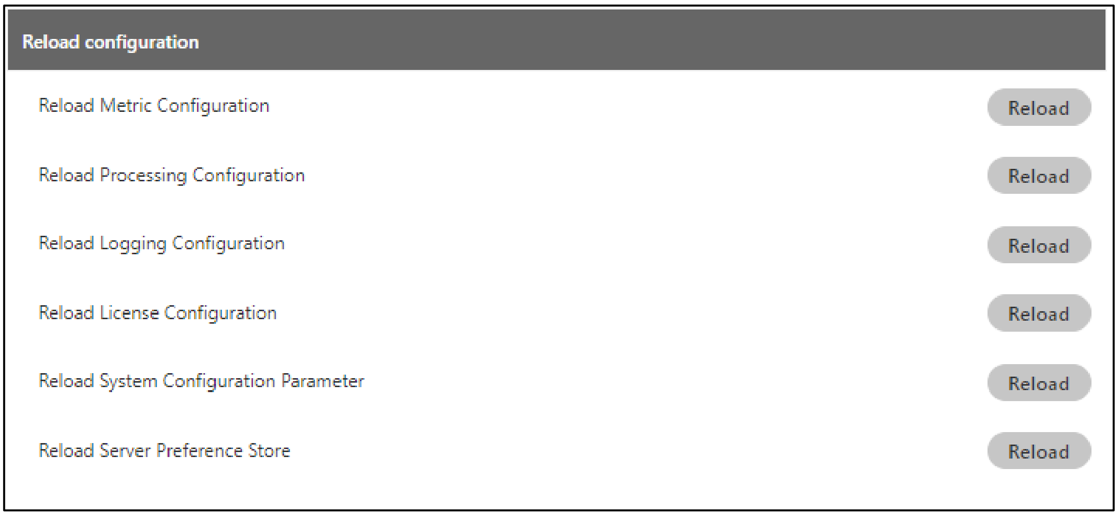


Figure: Reload Configuration Section

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

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

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

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

E. **Reload System Configuration Parameter:** Click this button to reload the system configuration parameter. Reloading the "System Configuration parameter" also reload the "IC Configuration Parameter" with one click. This button also reloads the AutoClose and AutoExpire Timers with one click.

There is no need to reload them separately.

Following parameters will be reloaded from here.

- isCustomerEditable
- shouldRunHeatValueTimer
- smsNotificationCredentials
- AutoClose Timer
- AutoExpire Timer

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

After the changes in mapping policies, always reload the server preference store.
If there is a change in licenses then reload both License configuration and server preference store.

7. **CRM Integration**: Here, the Administrator c enable the access to the Third-party Apps including CRMs such as Zoho, Zendesk, Salesforce, Microsoft Dynamics, Freshsales, and Freshdesk Mint. For some Apps like Zendesk CRM and Zoho Desk, the OAuth for Single Sign-On have to be enabled before authorizing the access.

Figure: Authorize Zendesk

The following screenshot displays the authorization of Ameyo Application Server to Microsoft Dynamics.

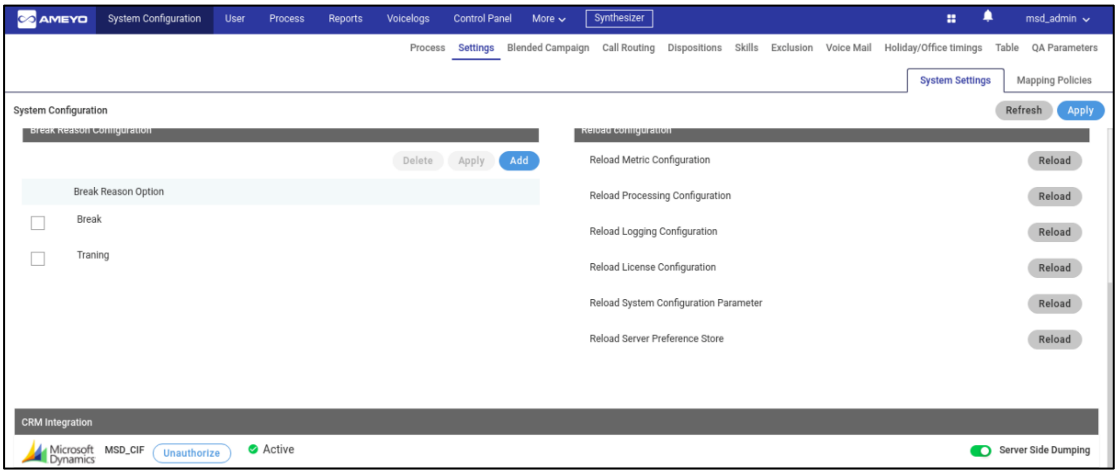


Figure: Option of Server-side Dumping for Microsoft Dynamics

After authorizing a linked Third-party App, the Administrator can click "Server-side Dumping" toggle switch to enable the server-side dumping of the data like Call Duration, etc. Know more...

The Administrator can click "Unauthorize" button to unauthorize the configured third-party app.

5.1.3.3 Ticket Settings

In this Tab, Administrator can define the Ticket Settings.

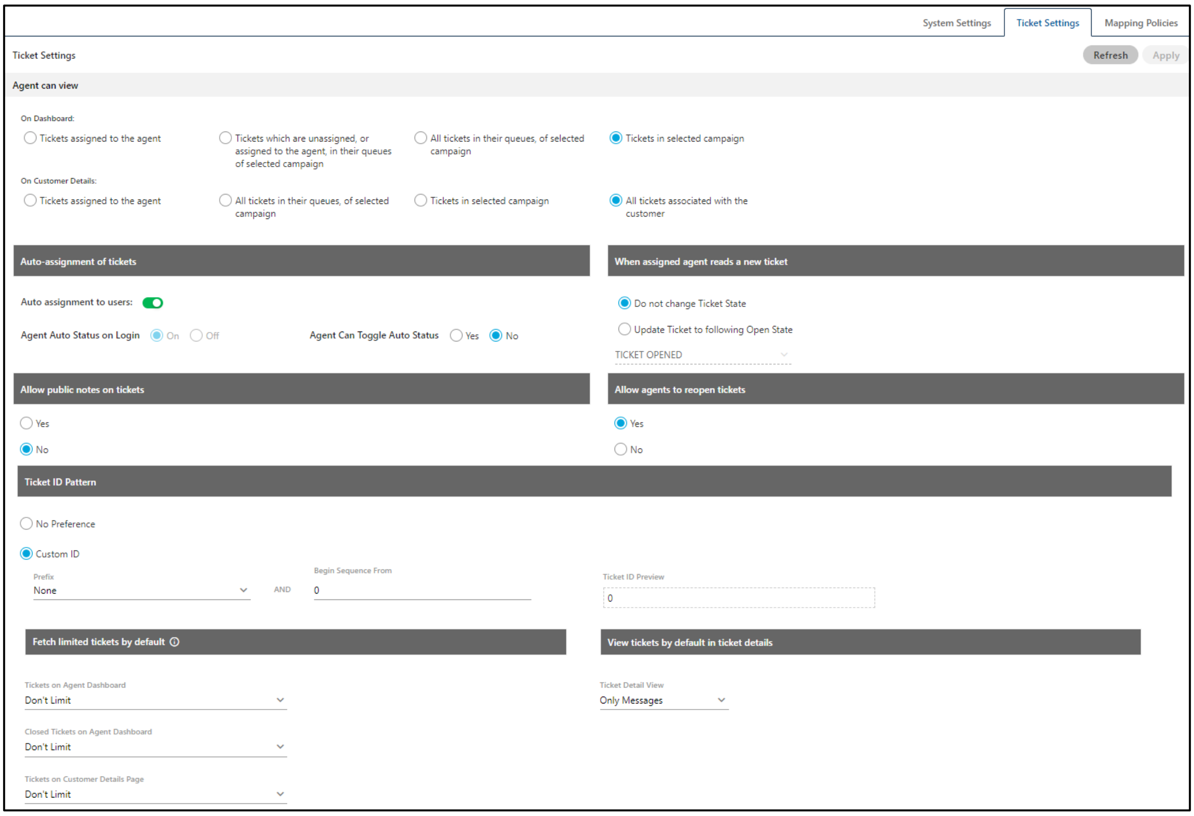


Figure: Ticket Settings

It contains the following settings.

5.1.3.3.1 Agent can view

Select the type of tickets that an agent can see.

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

    A. **Tickets assigned to the agent:** Select it to let the agent view only those tickets that are assigned to him/her.

    B. **Tickets which are unassigned, or assigned to the agent, in their queues of selected campaigns:** Select it to let the agent view both those tickets which are unassigned and which are assigned to the agents in their queues of selected campaigns. The tickets assigned to other agents of queues to which he/she is not assigned, will not be displayed to him/her.

C. **Tickets in queues assigned to the agent in selected campaigns:** Select it to let the agent view those tickets in queues which are assigned to the agents in its selected campaigns. It will not show the tickets which are either unassigned or assigned to other agents who are staffed to another campaign, in which he/she was not staffed.

D. **Tickets in selected campaigns:** Select it to view the tickets which are assigned to the agents in the campaigns elected by the agent.

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

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

   B. **Tickets in queues assigned to the agent in selected campaigns:** Select it to let the agent view all tickets in the queue which are assigned to the agents in its selected campaigns.

   C. **Tickets in selected campaigns:** Select it to let the agent view the tickets in the selected campaigns.

D. **All Tickets associated with the customer:** Select it to let the agent view all tickets associated with the customer.

5.1.3.3.2 Auto-assignment of tickets

Configure the options here to enable or disable Auto-Assignment of tickets to Users and allow or disallow the agents turn on or off their Auto-Status in interaction campaign.

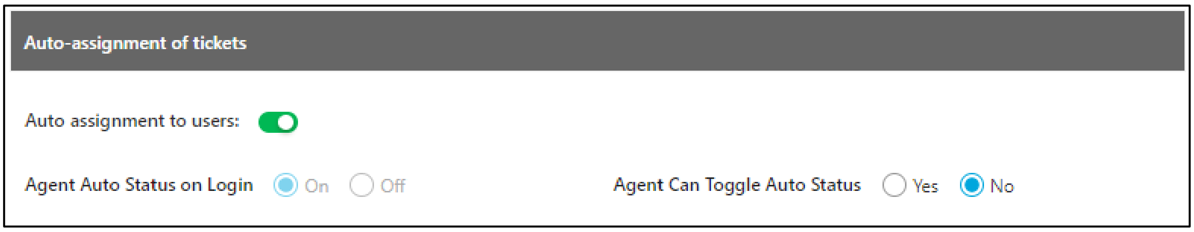


Figure: Auto-Assignment of Tickets

It contains the following options.

1. **Auto-assignment to users:** Click this toggle switch to turn on the Auto-Assignment of Tickets to the agents by default. If it is enabled, "Agent Auto Status On Login" option will also be enabled by default and remain disabled.

   If this option is enabled, the Administrator also get "Auto-Assignment to users" option at the queue level that can be configured. The Queue-level "Auto-Assignment to users" option will override this auto-assignment option of System-level.

   If it is enabled, the agents will be on "Auto-Status On" after their login in Interaction Campaign. The next option "Agent Can Toggle Auto Status" will allow or disallow agent to change this status. The Administrator can turn off this option to not assign tickets automatically to the agents.

2. **Agent Auto Status On Login:** This option will be enabled only when "Auto Assignment to Users" option is turned off. Select "On" to force the agents to be on "Auto-Status On" after their login to Interaction Campaign. Else, select "Off" to turn off this feature.
3. **Agent Can Toggle Auto Status:** Select "On" to allow the agents to toggle/change their "Auto-Status On" option. Else, select "Off" to turn off this feature.

5.1.3.3.3 When assigned agent reads a new ticket

By default, whenever the assigned agent reads a new ticket, the state of that ticket is changed to "Open" Internal State. If you want to set an external state, created under "Open" Internal State, as the default state when the assigned agents reads a new ticket, then this section helps you define that settings. It contains the following options.

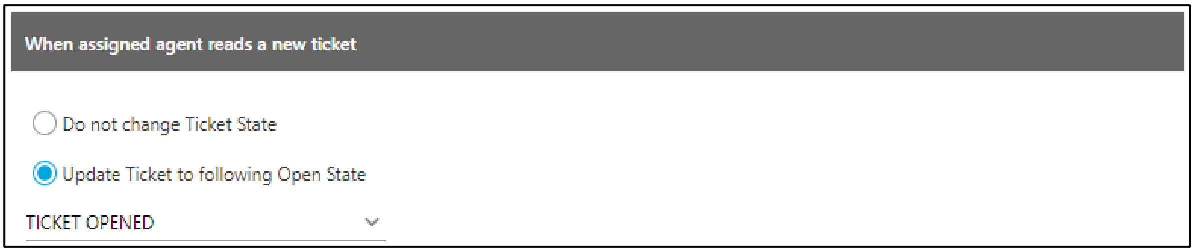


Figure: Set the State of New Ticket when the assigned agent reads it

1. **Do not change Ticket State:** Select it to not change the state of the ticket when then agent assigned to a ticket reads it.
2. **Update ticket to following open state:** Select it to change the update the state of the ticket as per the external state of "Open" Internal State selected the in the drop-down menu.

5.1.3.3.4 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.

1. **Yes:** Select it to allow the public notes on the tickets.
2. **No:** Select it to disable the public notes on the tickets.

5.1.3.3.5 Allow agents to reopen tickets

Configure this option to allow or disable to agents to reopen the closed tickets. It contains the following options.

1. **Yes:** Select it to let the agents reopen the closed tickets.
2. **No:** Select it to not allow the agent to reopen the closed tickets.

5.1.3.3.6 Ticket ID Pattern

The Administrator can now customize the ID Number of the tickets at the System level.

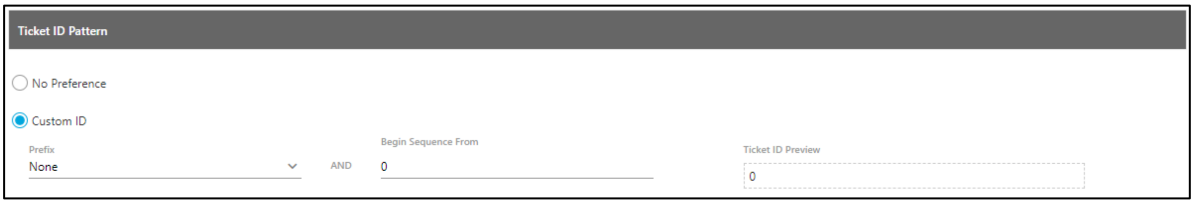


Figure: Ticket ID Pattern

The Administrator has to perform the following steps to do this customization.

1. Select "Custom ID" to provide a customized ticket ID. Perform the following steps.
2. Select any of the following options as the prefix of the Ticket ID.
   A. **NONE:** Select it not to add any prefix.
   B. **YYYYMMDD:** Select it to add "YYYYMMDD" as the prefix.

C. **DDMMYYYY:** Select it to add "DDMMYYYY" as the prefix.

D. **MMDDYYYY:** Select it to add "MMDDYYYY" as the prefix.

DD, MM, and YYYY will be replaced with their respective values as per the date when the ticket is being created.

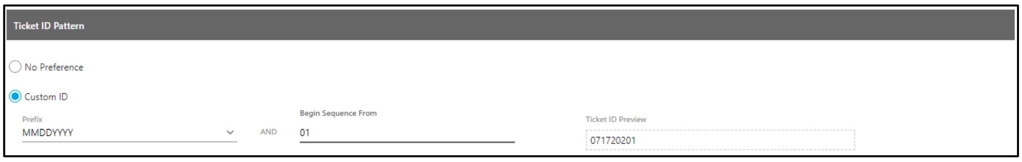


Figure: Customized date-based Ticket ID

E. **Custom:** Select it to add the provided custom alphanumeric input as the prefix. Upon selecting, it enables an additional text field named "Value" at the bottom. You have to enter an alphanumeric value in it.

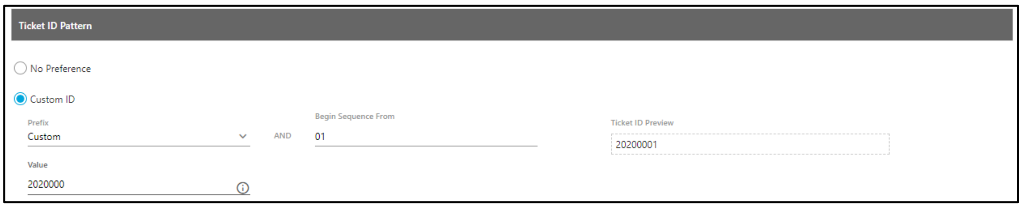


Figure: Custom-field based Ticket ID

3. **Begin Sequence From:** Here, you have to provide the number from which the numbering of ticket IDs will start.

After this ID customization, the actual ticket will not be displayed in the entire interface of Ameyo System. It will only show the Custom ID. For debugging, it is necessary to fetch the actual Ticket ID from the provided Custom ID.

Custom Ticket ID is also visible in the tickets, that are being exported to CSV formats from the Agent's Dashboard. **Improved Ticket Resolvers to manage Custom Ticket IDs:** If Custom Ticket IDs are being used for **the first time**, the Ticket Resolvers of Email Media Profiles are appending the new emails and reply to emails to the same tickets even if their default ticket IDs has been replaced with the new Custom IDs.

However, this will not work if the Custom Ticket ID has been changed again with a new custom ticket ID or default ID. That means the Ticket Resolvers of Email Media Profiles **will not append** the new emails and reply to emails to same tickets if the already set Custom Ticket ID has been either **changed again** or **reset to default**.

5.1.3.3.7 Fetch Limited Tickets by default

If there is large amount of tickets, then the performance was being impacted and the Agents have to wait for considerable amount of time. Now, the Administrator can specify the date range within which the tickets will be fetched in the Agent Console. The Administrator have to navigate to "System" → "System Configuration" → "Settings" → "Ticket Settings" to access this option. In "Ticket Settings" page, go to the bottom.

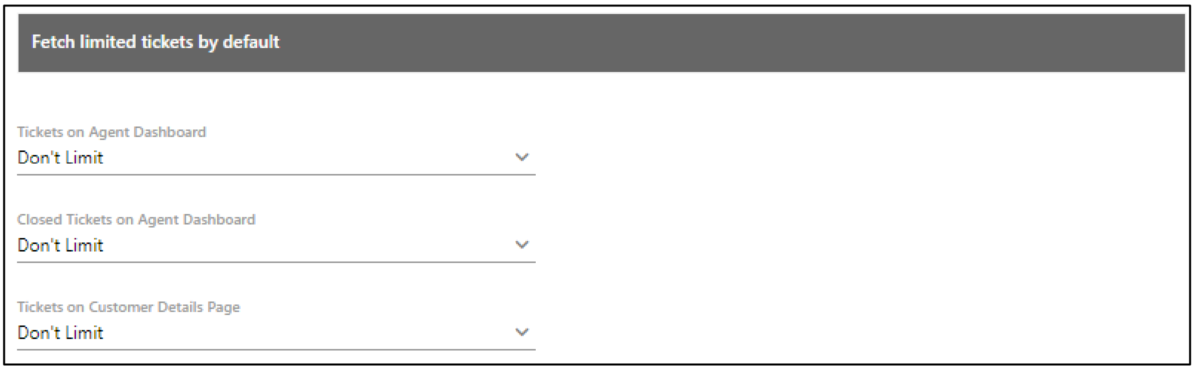


Figure: Option to Fetch Limited Tickets

It contains the following three settings.

- **Tickets on Agent Dashboard:** It allows you to specify the duration, within which the tickets will be displayed on Agent Dashboard. The tickets not matching this duration will not be available on the Agent Dashboard. The following screenshot shows the available duration for this configuration.

Figure: List of Available Duration for a Settings

It contains the following options.

- **Don't Limit:** Select it to not apply any date-range filter on fetching of tickets. If the number of tickets are large, then we recommend not to select this option.
- **Past 3 Months:** Select it to fetch the tickets of only past 3 months on the Agent Dashboard.
- **Past 6 Months:** Select it to fetch the tickets of only past 6 months on the Agent Dashboard.
- **Past 12 Months:** Select it to fetch the tickets of only past 12 months on the Agent Dashboard.
- **Custom Range:** Select it to provide the number of past months, of which tickets have to be fetched on the Agent Dashboard. After selecting this option, a text box titled "Define Date Range (in months)" is displayed along with "Tickets on Agent Dashboard" drop-down menu.

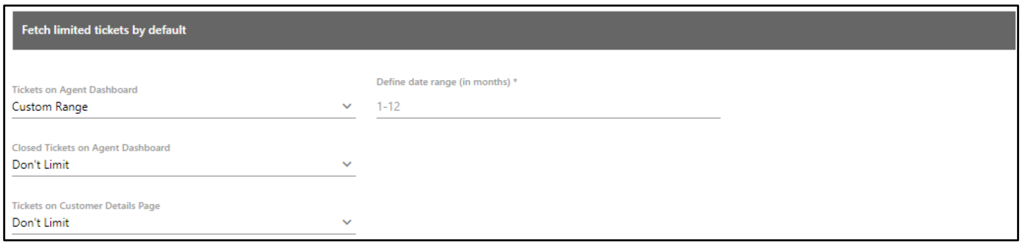


Figure: Custom Range Filter Option

Provide a value in number between 1 and 12.

- **Closed Tickets on Agent Dashboard:** It allows you to specify the duration, within which the tickets will be displayed on "Closed Ticket" pages on both Agent Dashboard and Customer page. The tickets not matching this duration will not be available on "Closed Ticket" pages. It contains the same options as that of "Tickets on Agent Dashboard" configuration, which are explained above.
- **Tickets on Customer Details Page:** It allows you to specify the duration, within which the tickets will be displayed on "Customer Details" page. The tickets not matching this duration will not be available on "Customer Details" page. It contains the same options as that of "Tickets on Agent Dashboard" configuration, which are explained above.

5.1.3.3.8 View tickets by default in ticket details

The administrator can enable the ticket view settings to show the default result of the tickets to the agents. It means that the default view of the ticket will be based upon the selected result of the administrator. However, the agent is able to change the selection from this drop-down list. The administrator can select the ticket view detail from the following four available options.

1. **All:** Selecting this option will allow the agents to view all the transactions and messages done on the ticket.

2. **Only Messages:** Select it to show only messages used on that ticket to the agent.
3. **With Notes:** Select it to view the messages with notes shared over the ticket.
4. **With Activity:** Select it to view all activities performed on the ticket.

Figure: Ticket Detail View List

5.1.3.4 Mapping Policies Tab

Here, Administrator can define the mapping policies selected in "System Settings Tag". It will have different interface for the different mapping policies.

Click a tab to read about the mapping policy.

5.1.3.4.1 IP Multiple User Call Leg Details Provider (Licensable)

If this option is selected in "User Mapping Policy" in "System Settings" tab, then the following screen is displayed here.

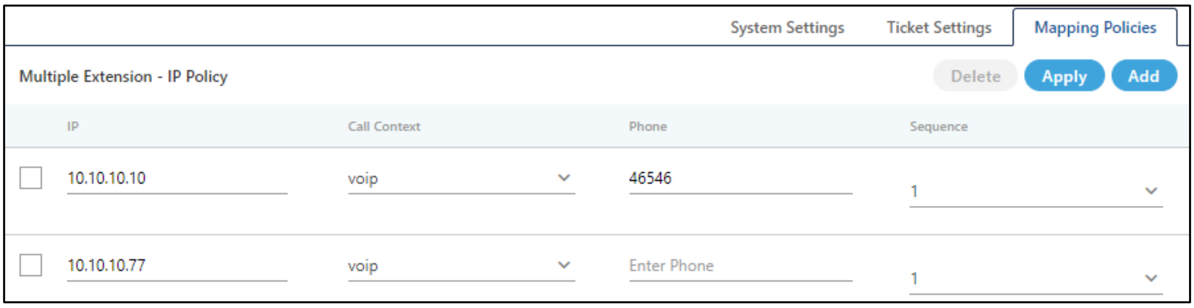


Figure: Configure Mapping Policy of "IP Multiple User Call Leg Details Provider"

It is IP-based Multiple Extension Policy, which allows the Administrator to assign multiple extensions to an IP Address. The Administrator has to perform the following the steps.

1. Click on **"Add"** button.
2. Enter the IP Address.
3. Select the Call Context.
4. Enter the Phone number (extension).
5. Select the Sequence.
6. Click on **"Apply"** button.

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

5.1.3.4.2 User ID Mapped Call Leg Details Provider (Licensable)

If this option is selected in "User Mapping Policy" in "System Settings" tab, then the following screen is displayed here.

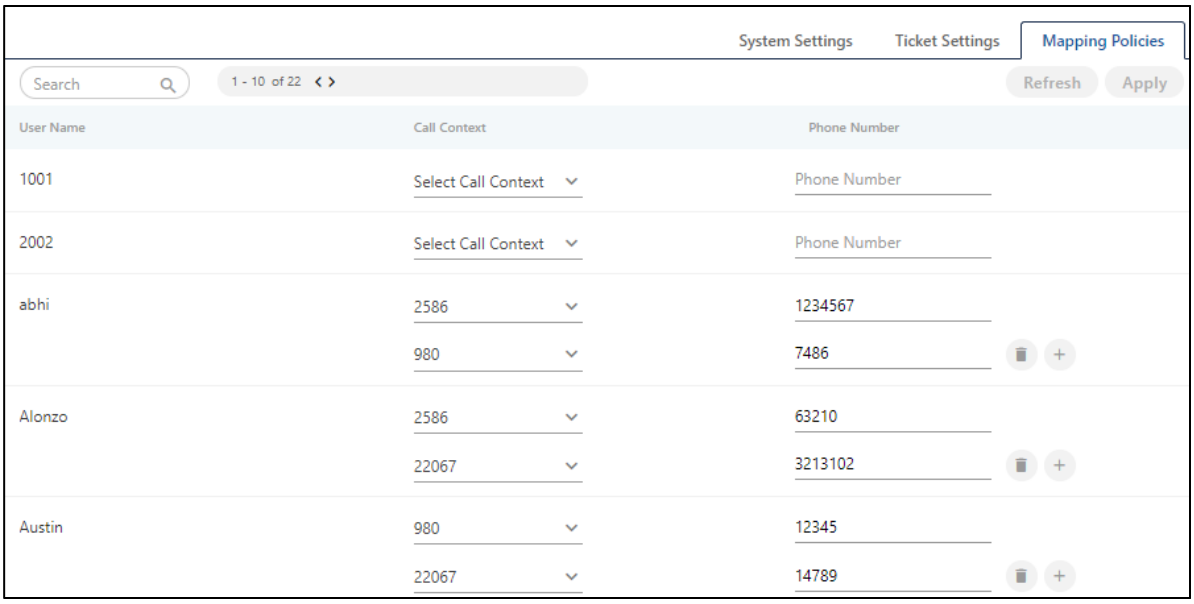


Figure: Configure Mapping Policy of "User ID Mapped Call Leg Details Provider"

It is currently in tabular format. Call Contexts and Phone Numbers are displayed for every user. Here, the Administrator can select the default call context and provide the number. If the user has been assigned multiple extensions, "+" icon is displayed with the phone number. The Administrator can click it and define multiple extensions. During logon, by default, these users will be assigned their respectively selected extensions and will not be asked to select the extensions.

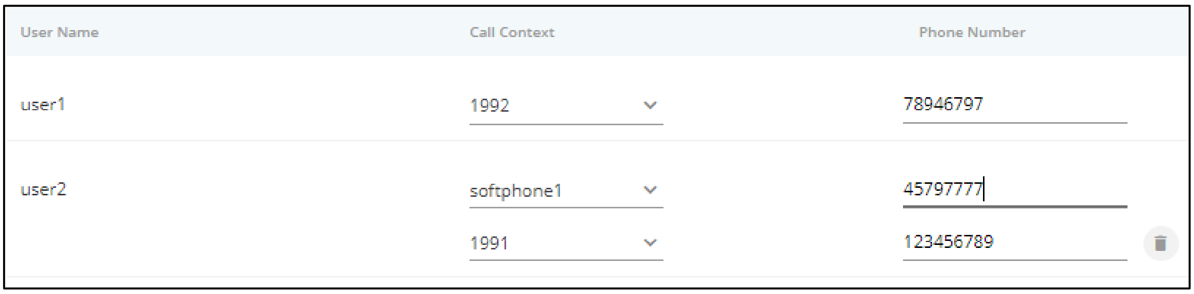


Figure: Mapped the Users with their Default Extensions in "Mapping Policies" Tab

After this configuration, when the agent (after logon to the system) selects the campaign in which the defined call context has been assigned to it, the agent will be logged on with the provided extension and it will not get the option to select other extensions.
For example, user1 has been assigned 1992 call context and 78946797 phone number. Now, user1, at the time of logon to the system, user1 (after selecting relevant campaign) will be logged on automatically at 1992 Call Context and 78946797 phone number.

The Phone Number can be edited in the Mapping Policy.

If a user is logged on to the Ameyo Toolbar Integration in a third-party application, then the user can use up to three extensions for the following call types simultaneously.

- inbound.call.dial
- outbound.auto.dial
- outbound.manual.dial
- transferred.to.campaign.dial
- outbound.callback.dial

However, this feature does not work simultaneously for the following call types in multiple extensions.

- click.to.call.dial
- outbound.auto.preview.dial
- outbound.manual.preview.dialing

5.1.3.4.3 User ID Based Call Leg Details Provider (Licensable)

It is preferred to use this policy in case of WebRTC only. While using it, you have to configure WebRTC also. Please refer to the following document.
Reference Document: WebRTC Manual

If this option is selected in "User Mapping Policy" in "System Settings" tab, then the following screen is displayed here. It is useful when you have multiple voice resources and you want to map users to these voice resources.

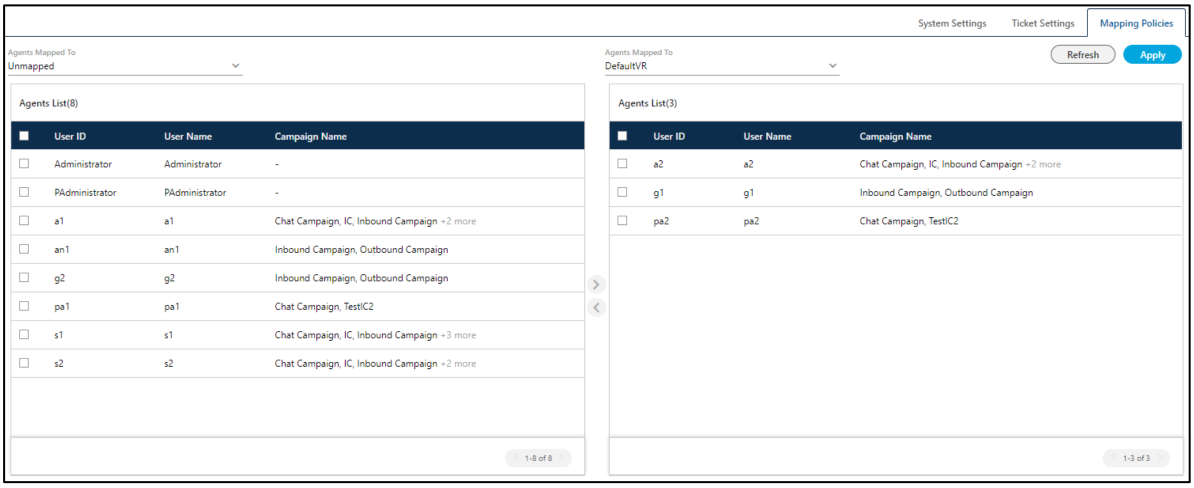


Figure: Configure Mapping Policy of "User ID Based Call Leg Details Provider"

The Administrator can select the users and map them to the available Voice Resources. This interface is divided into the two sections - Left Section and Right Section. The Administrator can map the unmapped users to a voice resource. Moreover, the Administrator can move the users between voice resources.

Perform the following steps.

1. Select the voice resource or "Unmapped" in "Agent Mapped To" drop-down menu of the Left Section. If you have added only one voice resource, it will show "Unmapped" option only. In the Left Section, the users will be listed as per the selected option.
2. Select the voice resource in "Agent Mapped To" drop-down menu of the Right Section.

3. Select the users in the Left 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.

4. Click icon to add the selected users.

   To unassign the users from a Voice Resource, select the voice resource in "Agent Mapped To" drop-down menu to list the users mapped to the selected voice resource. Now, select the users in the Right section and click icon.

5.1.3.4.4 Manual User Call Leg Details Provider (Licensable)

If this option is selected in "User Mapping Policy" in "System Settings" tab, then the following screen is displayed here.

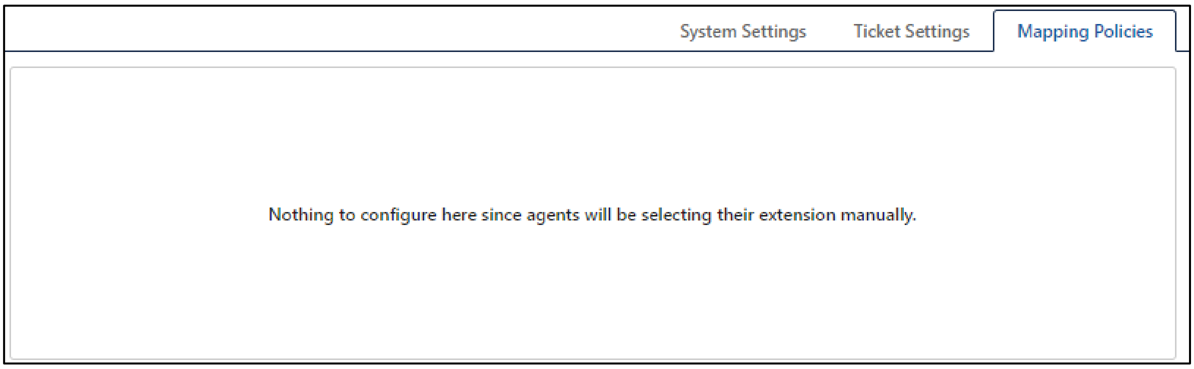


Figure: Configure Mapping Policy of "Manual User Call Leg Details Provider"

Here, the Administrator has to perform no action. The Agents will select the extensions on their own.

5.1.3.4.5 IP user call leg details provider (Licensable)

If this option is selected in "User Mapping Policy" in "System Settings" tab, then the following screen is displayed here.

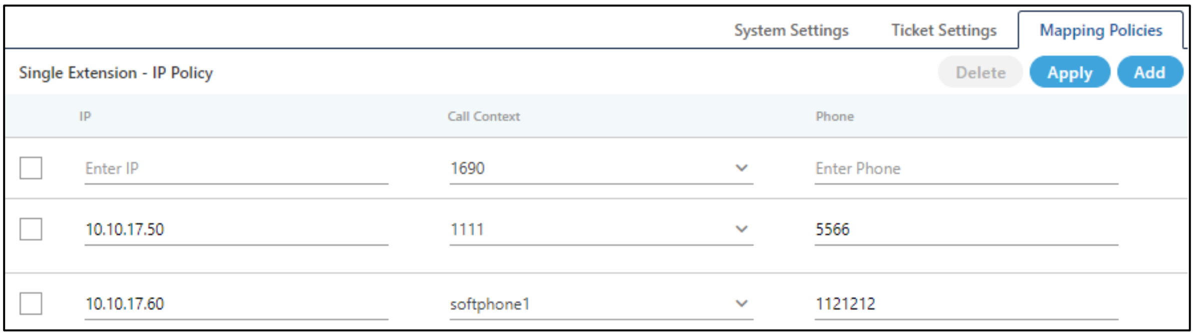


Figure: Configure Mapping Policy of "IP Based User Call Leg Details Provider"

It is an IP-based Single Extension Policy, which allows the administrator to define the Single Extension Policy for an IP Address.

1. Click on **"Add"** button.
2. Enter the IP Address.
3. Select the Call Context.
4. Enter the Phone number (extension).
5. Click on **"Apply"** button.

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

5.1.4 Table in System Configuration

5.1.4.1 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 and others). In that case, we define the data types or columns.

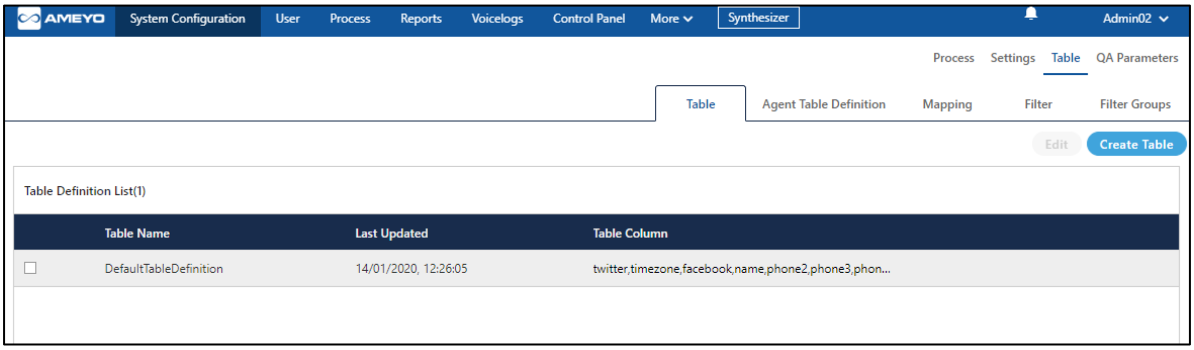


Figure: Table Settings in "System Configuration"

It contains the following tabs.

- Table Definition
- Agent Table Definition
- Mapping Policies
- Filter
- Filter Groups

Click the links to know more about them.

5.1.4.2 Table Definition

In this tab, you can create, edit, and delete the table definitions.

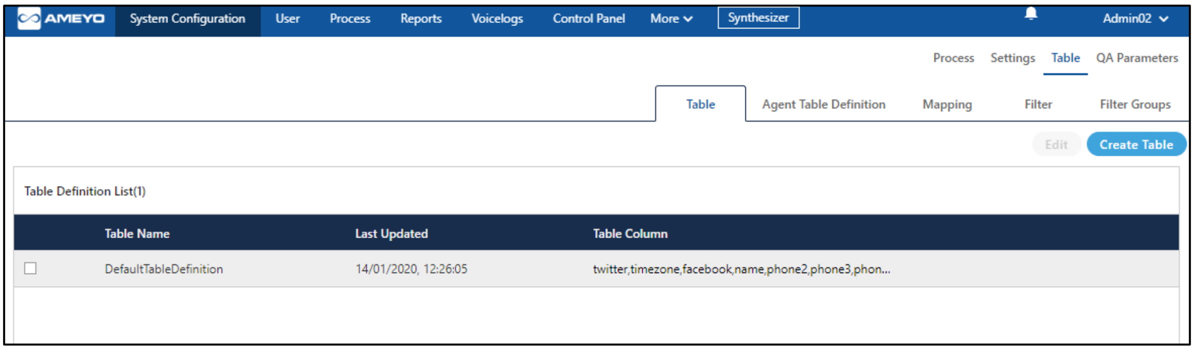


Figure: Table Settings in "System Configuration"

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

5.1.4.2.1 Create Table Definition

Administrator has to perform the following steps to create a new data table.

1. Click 

button. A pop-up will appear.

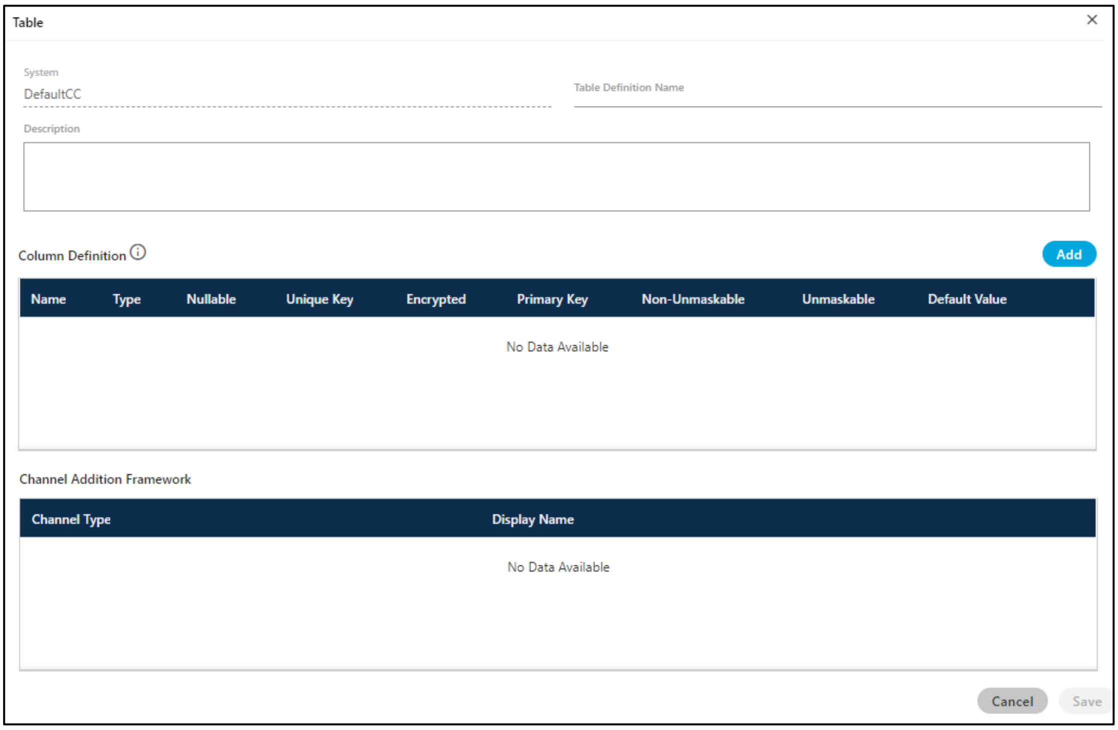


Figure: Create Table

2. Provide 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. You can use only "_" (underscore) as a special character while providing a name for Table Definition. Other special characters are not allowed.

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.

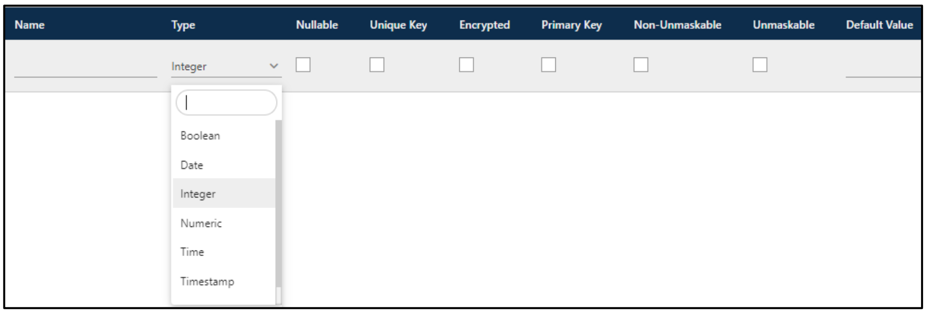


Figure: Add a row

II. Here, you have to provide the following values to add a column.

a. **Name:** Provide a name of the column. You can use only "_" (underscore) as a special character while providing a name for a Column. Other special characters are not allowed.

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

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

ii. <u>Numeric</u>: Select it to accept the numbers including decimals.

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

iv. <u>Varchar</u>: Select it to accept the alphabets with numbers.

v. <u>Date</u>: Select it to accept the date.

vi. <u>Time</u>: Select it to accept the time.

vii. <u>Timestamp</u>: 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. **Non-Unmaskable (Licensable):** It provides the option to mask the values stored in a field.

The feature to unmask the already masked values will not be provided. So, use this feature consciously.

All or only important fields can be masked. If the Administrator selects a field to be maksed, then whatever data will be stored in this field will be masked at User Interface of the entire Ameyo System, in Customer Manager API, and at the backend, in the databases of PostgreSQL. For example, the data will be masked in AmeyoRefresh and CustomerProspect tables. Except the last 4 characters, all characters in the data will be masked with "X" letter such as XXXXXX1234.

If you are modifying an existing Table Definition or creating a new one in an already existing Ameyo Setup, only the new data will be masked in the field selected for masking, however, the old data will not be masked.

Perform the following steps to enable the masked Data Processor

i. Execute the following query to verify whether the maskDataPreProcessor is available or not.

   SELECT * FROM system_configuration_parameter WHERE name = 'customerManagerPreprocessorsNames';

ii. Execute the following query to enable the maskDataPreProcessor if it is not available.

update system_configuration_parameter set value='duplicatePreprocessor,numberRegexMatcherPreprocessor,standardNumberFormaterPreprocessor,maskDataPreProcessor' where name='customerManagerPreprocessorsNames';

iii. Run the following query.

update column_definition set masking_policy_type='FIRST_X_LAST_Y_UNMASKED' where name=''; Update column_definition set masking_policy_properties='{"last_y_characters":"4","masked_string":"","first_x_characters":"6"}' where name='<Column_Name_To_Mask>';

It is configurable that how many digits of the data has to be masked or unmasked from starting and how many digits has to be masked or unmasked from the end. Suppose the card number of 10 digits has to be masked. If it is configured that first 5 digits will be unmasked and the last 5 digits will be unmasked, then the complete number will remain unmask.

If you select "Masked" for a field, then it cannot be "Primary Key" and "Unique Key". Also, default value of "Type" for a Masked field will be "VARCHAR" and it cannot be changed.

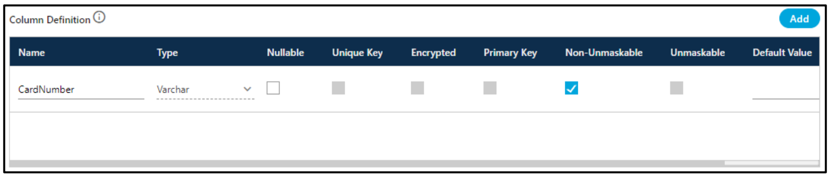


Figure: Sample Values to create a Table

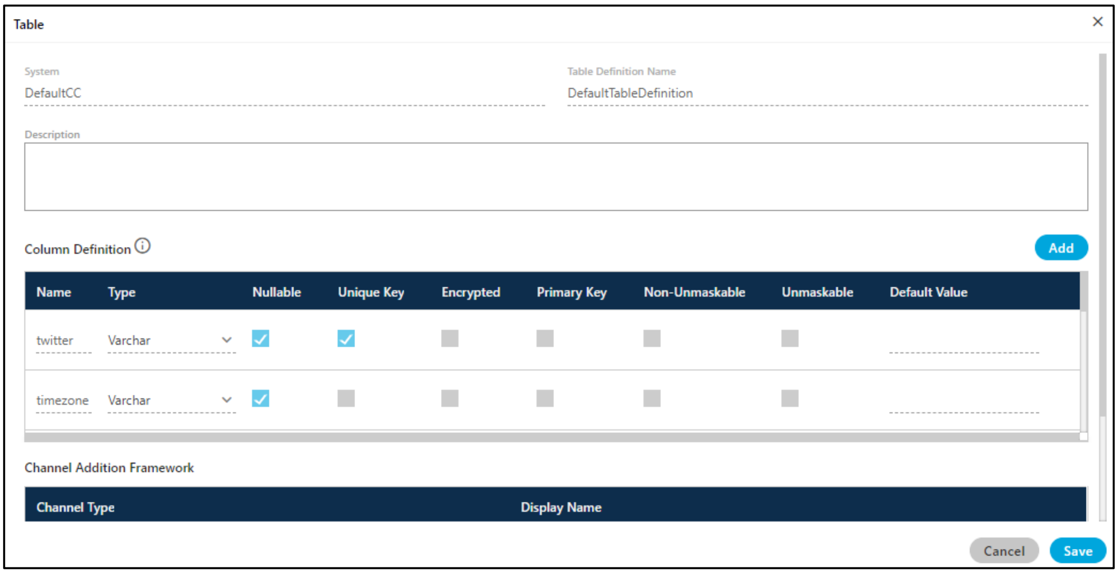
There may be some cases arise when you have to disable the mask data fields. In this case, run the following query to disable the Mask Data Field. update system_configuration_parameter set value='duplicatePreprocessor,numberRegexMatcherPreprocessor,standardNumberFormaterPreprocessor' where name='customerManagerPreprocessorsNames';

g. **Unmaskable:** If selected, then the values of this field will not mask.

h. **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. 

5. **Figure:** Sample Values to create a Table

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

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

Following screenshot shows a newly created table.

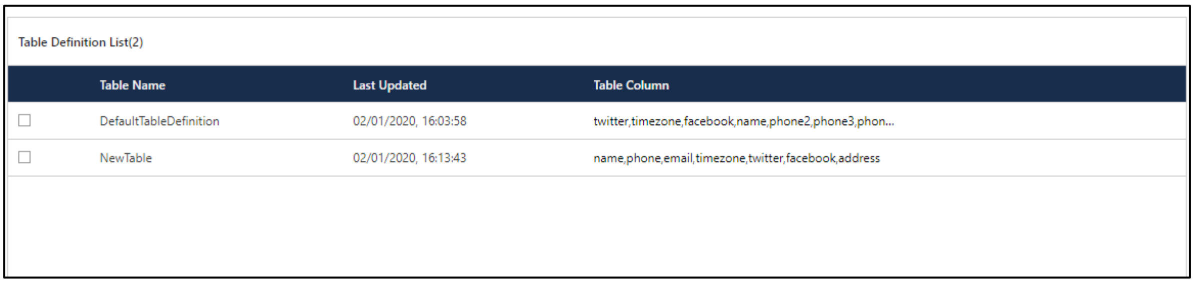


Figure: Created a Table

5.1.4.2.2 Modify Table Definition

Perform the following steps to edit the table.

1. Select a table and click "Edit".

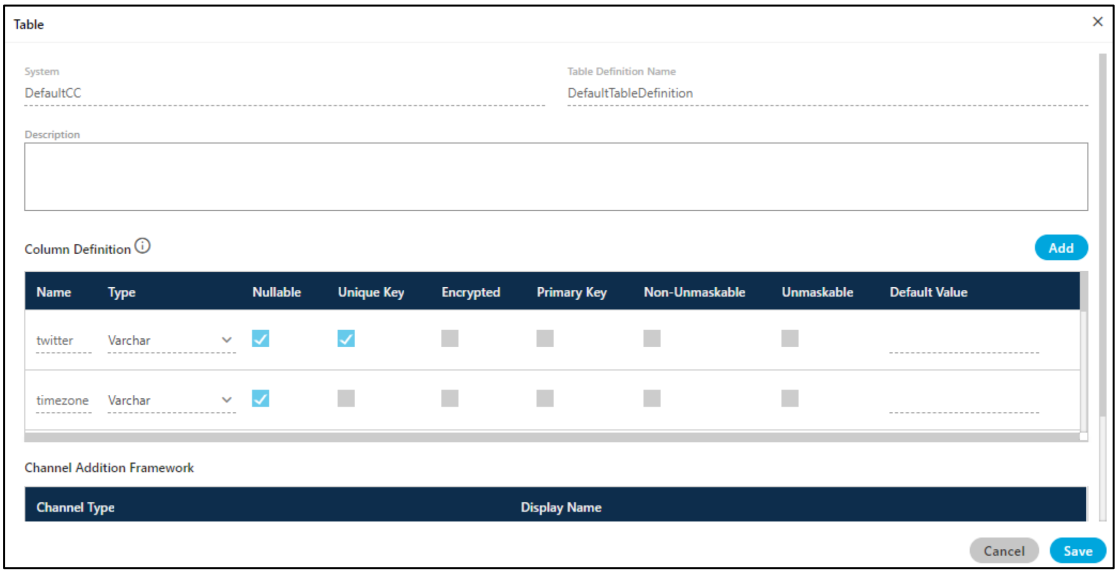


Figure: Modify a Table Definition

2. You can change the following fields here.
   A. **Add new column:** You can add the new columns in the table definitions. Click "Add" button to add the new column. A blank row is added at the bottom of the table. Here you can define the properties of the table column.

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

   C. **Description:** Change the description.

You cannot modify or delete the columns. Also, you cannot modify the column properties such as name, type, Nullable, unique key, primary key, or default value.

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

Click "Cancel" to cancel the changes.

5.1.4.2.3 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.

5.1.4.3 Agent Table Definition

Agent Table Definition is actually the template to provide the fields (or columns) to store the Customer Information in the Agent Dashboard. Its user interface allows the Administrator to assign the fields (that store customer information) to the particular agents. If some agents are not assigned the Table Definition Fields (that will store Customer Information), then they will not be able to see, access, and modify the Table Definition Fields. The Administrator can also decide who can modify or not modify the assigned Customer Information Fields.

The Administrator can also define the sequence of appearance of these Definition Fields.

A default Agent Table Definition will be created whenever a new Data Table Definition is created. By default, all fields of Data Table Definition will be assigned to visible in the default Agent Table Definition. The Administrator have to create a new Agent Table Definition to decided what to show where and what has to be allowed to agents to edit.

A new sub-tab named "Agent Table Definition" has been added in "Table" Tab in "System Configuration" in the Administrator Console.

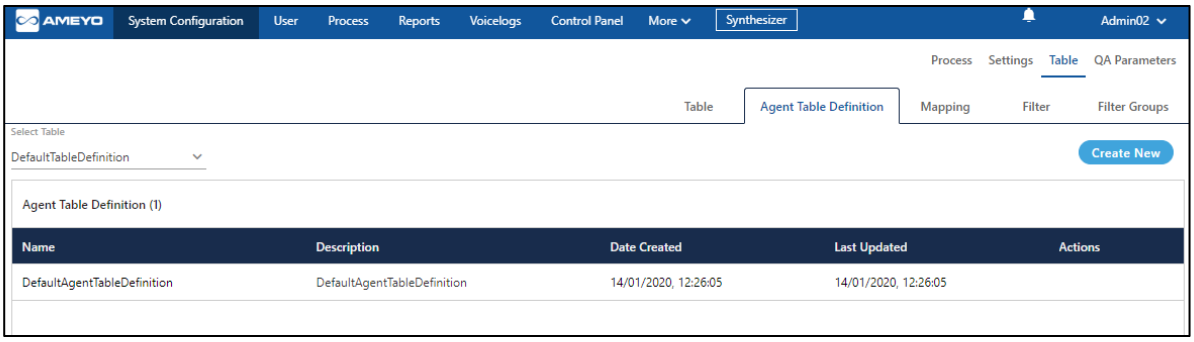


Figure: New Tab of Agent Table Definition

5.1.4.3.1 Create New Agent Table Definition

Perform the following steps to create a new Agent Table Definition.

1. Click "Create New" button on the top-right corner to create a new Agent Table Definition. It shows the following page.

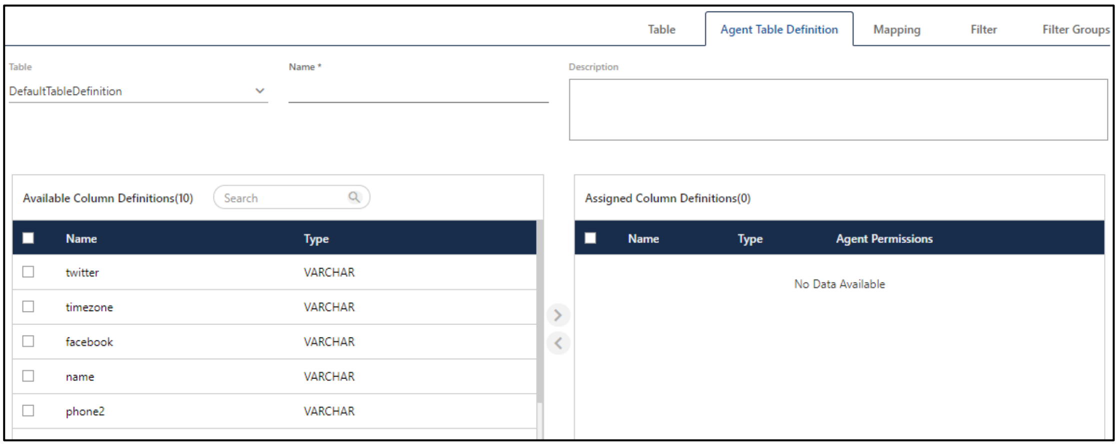


Figure: Create New Agent Table Definition

2. In "Table" drop-down menu, select the Table Definition for which you want to create the Agent Table Definition. The fields of the selected table will be listed in "Available Column Definitions" section.
3. Provide a name for the Agent Table Definition.
4. Provide the description, if required.

5. Now, select the fields in "Available Column Definitions" that you want to assign to the agents. Click icon to move the fields to "Assigned Column Definitions" section.

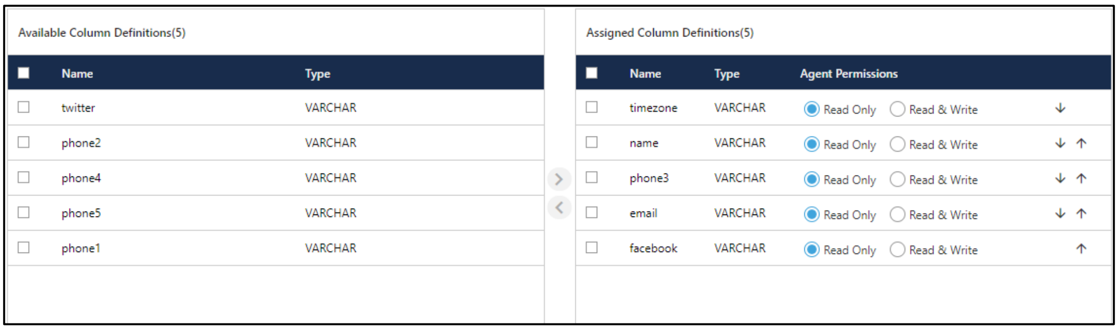


Figure: Assign and Unassign Fields

To unassign the fields, select the fields in "Assigned Column Definitions" section and click icon to unassign the fields.

6. **Enable or Disable Field Modification:** In "Assigned Column Definitions" section, you can select the following options for every field.
   - **Read Only:** Select this option to allow the agents to only read the Customer Information stored in this field. The Agents cannot modify the customer information in this field.
   - **Read & Write:** Select this option to allow the agents to read and modify the Customer Information stored in this field.
7. **Order of Appearance of Fields:** The top to bottom positioning of the fields in "Assigned Column Definitions" section will be the order of appearance of the fields in the Customer Information. The following screenshot displays the sample order of appearance of fields.

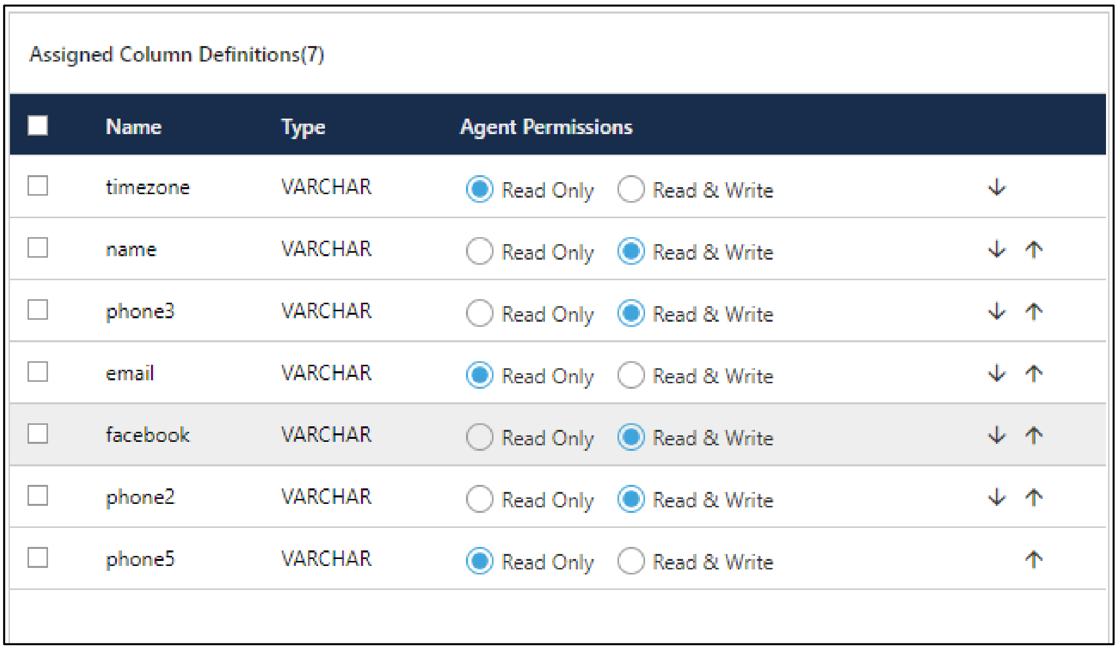


Figure: Sample Order of fields

You can click "↓" icon to move the field to bottom and click "↑" to move the field up. After every click on any of these icons for a field, the positioning of that field will change.

8. Click "Save" to save the Agent Table Definition. It takes you back to "Agent Table Definition" Tab, which shows the list of Agent Table Definitions including the newly created one.

You can assign or unassign the fields, make the fields editable or non-editable, and change the order of their appearance even while modifying the default or custom Agent Table Definition.

5.1.4.3.2 Modify an Agent Table Definition

"Agent Table Definition" tab shows the list of existing Agent Table Definitions.

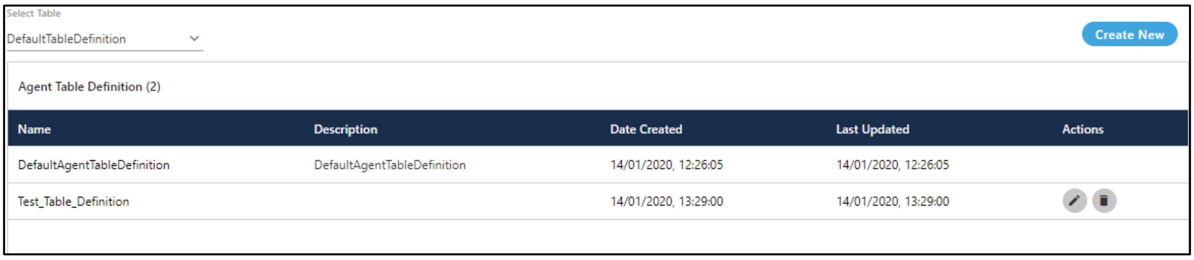


Figure: List of Agent Table Definitions

Perform the following steps to modify an existing Agent Table Definition.

1. Click icon for an existing Agent Table Definition to modify it using the following page.

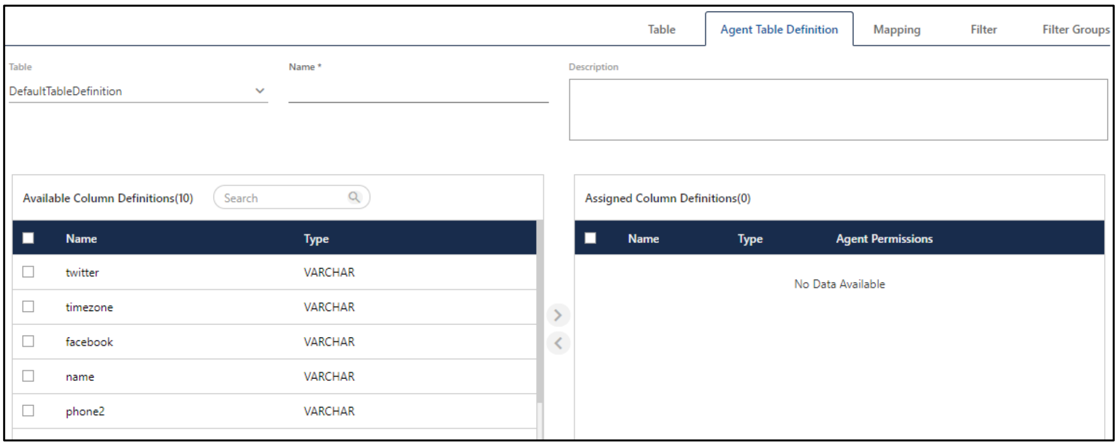


Figure: Page to modify an existing Agent Table Definition

2. You can make the following changes.
   - Name of Agent Table Definition
   - If you change the name of an existing Agent Table Definition, which has been selected and applied on a Campaign, then it may not work in that campaign.
   - Description
   - Assign or Unassign the Table Definition Fields
   - Mark the Agent Table Definition fields as "Read Only" or "Read and Write"

- Change the order of appearance of these fields

3. Click "Save" to save the changes.

   Rather click "Cancel" to discard the changes.

The changes made in Agent Table Definition will be applicable in real-time. However, these changes will be displayed to the agents only when they open a new Customer page after that change.

5.1.4.3.3 Delete Agent Table Definition

The Deleted Agent Table Definition cannot be restored in any way. It will not be used in the Campaign and in the Agent Console. If the Agent Table Definition is assigned to a campaign and is being used by the agents, then the agent may not be able to that Agent Table Definition for the new Customer Communication until a new Agent Table Definition is assigned.

"Agent Table Definition" tab shows the list of existing Agent Table Definitions.

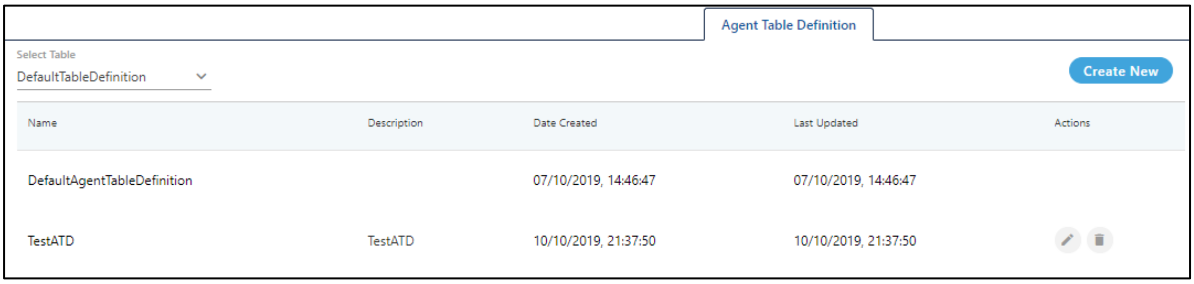


Figure: List of Agent Table Definitions

Perform the following steps to modify an existing Agent Table Definition.

1. Click icon to delete an existing Agent Table Definition. It shows the following warning message.

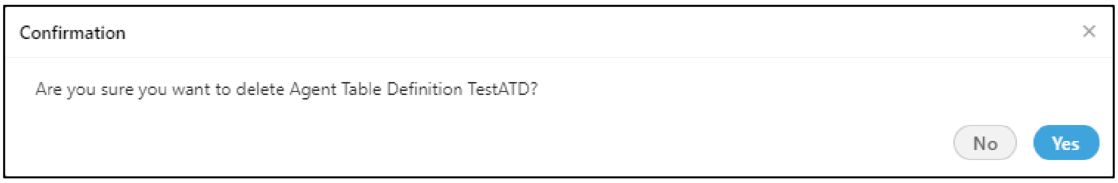


Figure: Pop-up to confirm the Deletion of Agent Table Definition

2. Click "Yes" to delete the Agent Table Definition.

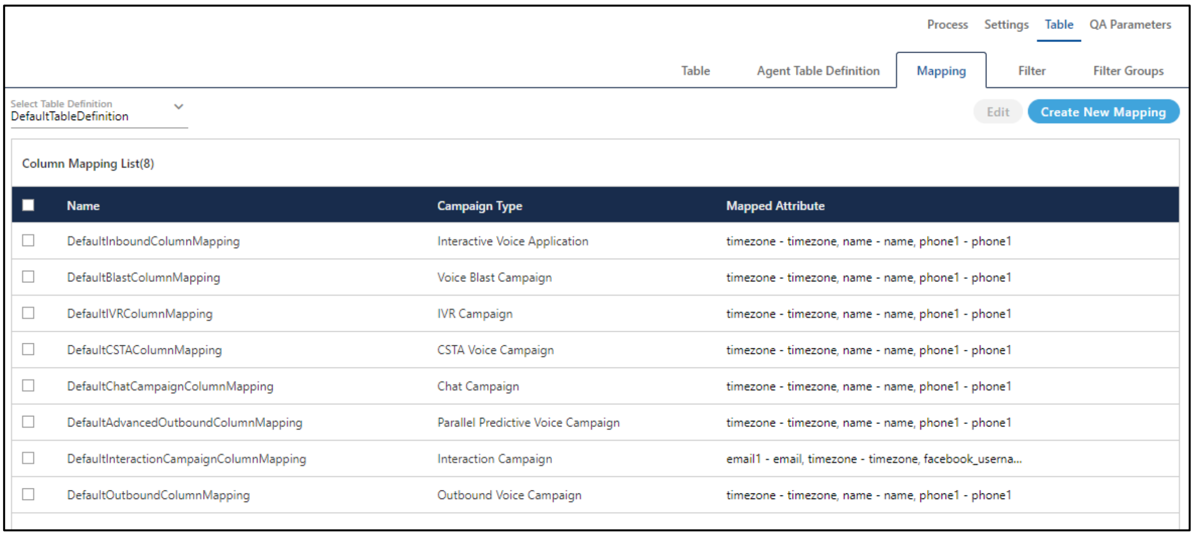
   Rather, click "No" to not delete it.

"DefaultAgentTableDefinition" cannot be deleted. When the Administrator tries to delete it, the system shows the following error message on the screen.

Figure: Error while deleting the Agent Table Definition

5.1.4.4 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.



Name	Campaign Type	Mapped Attribute
DefaultInboundColumnMapping	Interactive Voice Application	timezone - timezone, name - name, phone1 - phone1
DefaultBlastColumnMapping	Voice Blast Campaign	timezone - timezone, name - name, phone1 - phone1
DefaultIVRColumnMapping	IVR Campaign	timezone - timezone, name - name, phone1 - phone1
DefaultCSTAColumnMapping	CSTA Voice Campaign	timezone - timezone, name - name, phone1 - phone1
DefaultChatCampaignColumnMapping	Chat Campaign	timezone - timezone, name - name, phone1 - phone1
DefaultAdvancedOutboundColumnMapping	Parallel Predictive Voice Campaign	timezone - timezone, name - name, phone1 - phone1
DefaultInteractionCampaignColumnMapping	Interaction Campaign	email1 - email, timezone - timezone, facebook_userna...
DefaultOutboundColumnMapping	Outbound Voice Campaign	timezone - timezone, name - name, phone1 - phone1

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.

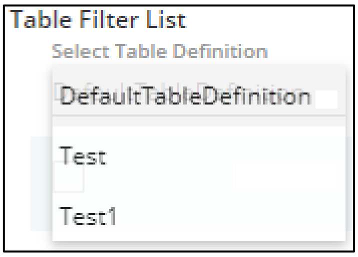


Figure: Select Table Definition

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

5.1.4.4.1 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.

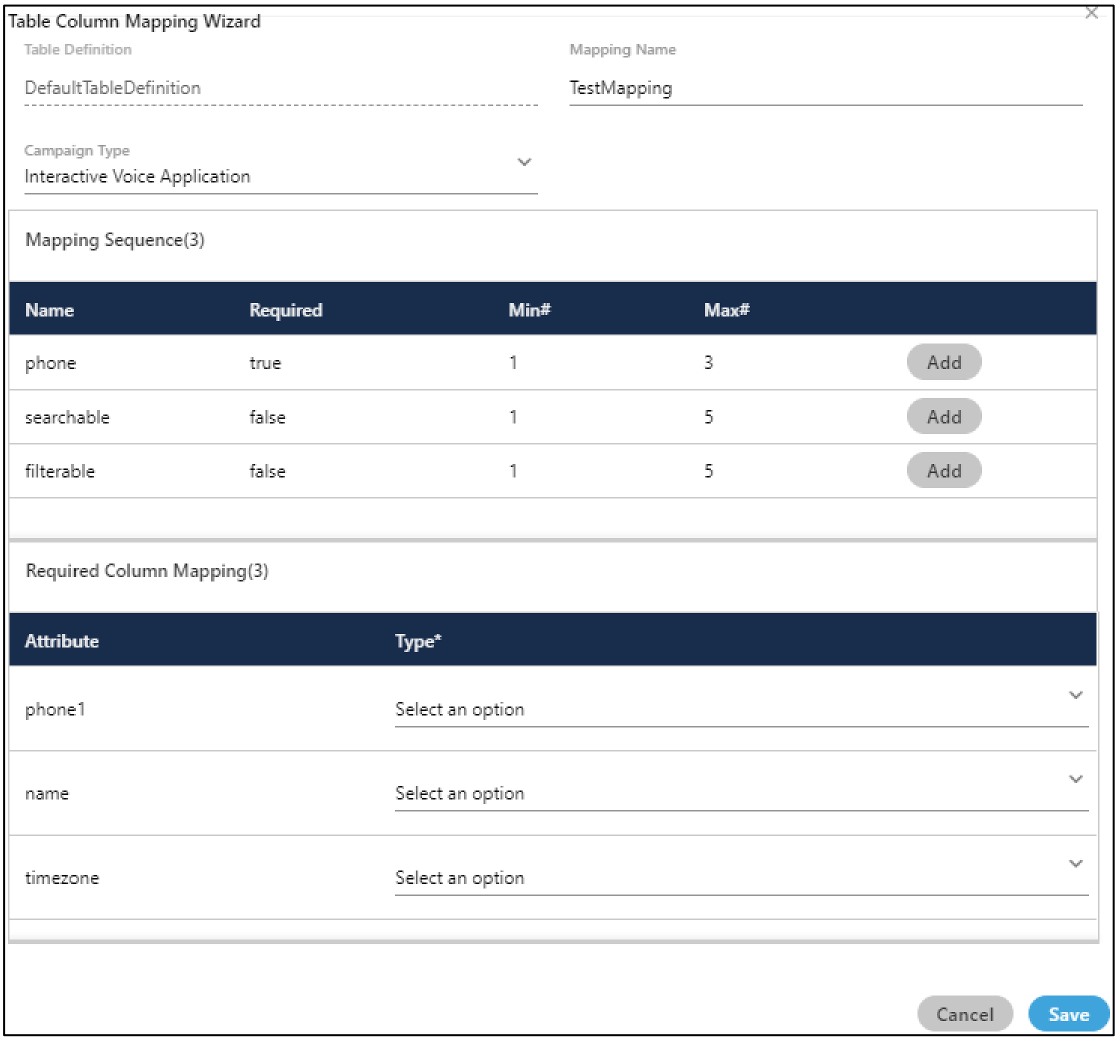


Figure: Create Table Column Mapping

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 (Licensable: 5 to 10 fields): It lets you add the searchable and optional columns in the mapping. It is not necessary to create the searchable fields. Through this feature the column on which the searchable field is applied, the column becomes searchable, means a search bar appears on the column which allows the user to search for any of the data.

Buy the license to increase the number of searchable fields. After purchasing the license, run the following query.

INSERT INTO system_configuration_parameter(name,type,value,default_value) VALUES ('maxSearchableFieldsAllowed','Integer','<number_of_searchable_fields>','<number_of_searchable_fields>');

The maximum number of searchable fields (after both license and configuration) is 10. After purchasing licenses, perform the configuration to increase the number of fields, if any step missed then number of fields will not increase. Contact either Marketing Department or Services Team of Ameyo.

II.

Phone (Licensable: 5 to 50 fields): It lets you add the mandatory columns in the mapping. It is mandatory for the user to fill these columns.

Buy the license to increase the number of phone fields. After purchasing the license, run the following query.

INSERT INTO

system_configuration_parameter(name,type,value,de

fault_value) VALUES

('max.phone.allowed','Integer','<number_of_phone_fi

elds>','<number_of_phone_fields>');

The maximum number of phone fields (after both license and configuration) is 50. After purchasing licenses, perform the configuration to increase the number of fields, if any step missed then number of fields will not increase. Contact either Marketing Department or Services Team of Ameyo.

D. **ilterable:** It lets you add the filterable columns in the mapping. The user can leave these columns blank. Through this feature the administrator now have another filter field through which he can filter for the required voicelogs.

Buy the license to increase the number of filterable fields. After purchasing the license, run the following query.

INSERT INTO system_configuration_parameter(name,type,value,default_value) VALUES ('maxFilterableFieldsAllowed','Integer','<number_of_filterable_fields>','<number_of_filterable_fields>');

The maximum number of filterable fields (after both license and configuration) is 10. After purchasing licenses, perform the configuration to increase the number of fields, if any step missed then number of fields will not increase. Contact either Marketing Department or Services Team of Ameyo.

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

   You cannot edit or delete the column mappings here.

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

   A. twitter
   B. timezone
   C. facebook
   D. name
   E. phone1
   F. phone2
   G. phone3
   H. phone4
   I. phone5
   J. email

5. **<u>Type</u>:** You have to select the types of these attributes for the added column mappings.

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

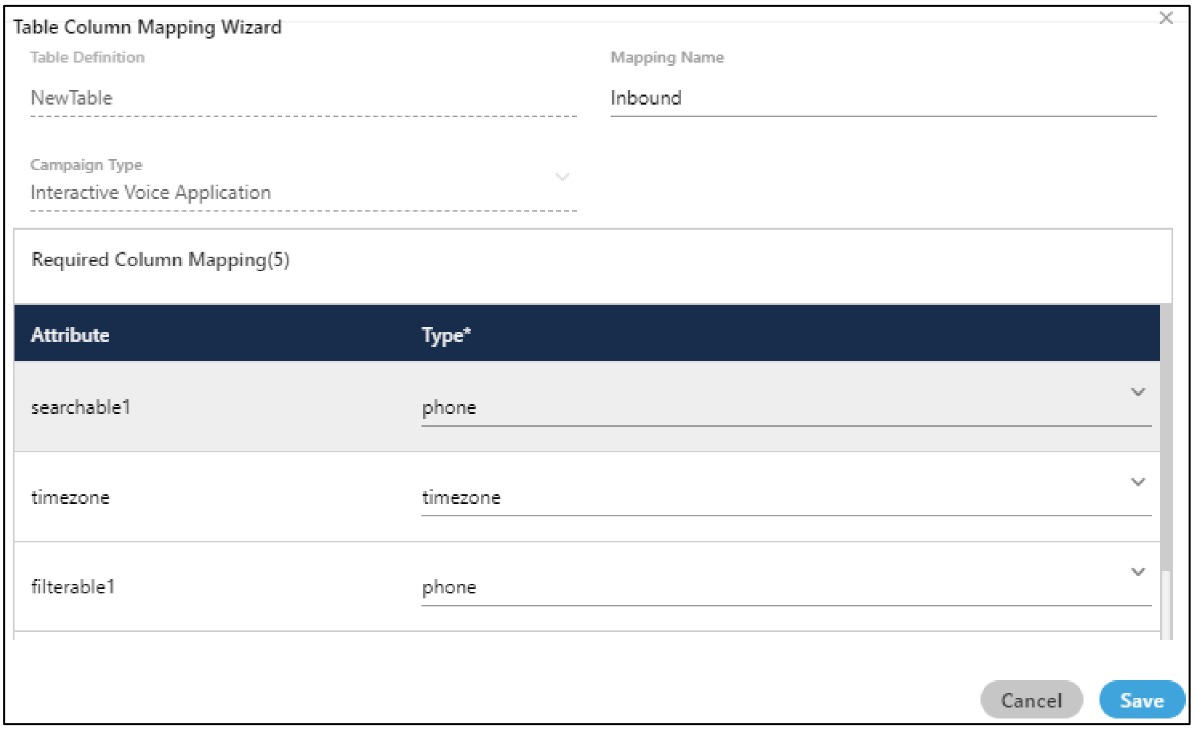


Figure: Sample Table Mapping

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

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

  Following screenshot shows two newly created table mappings.

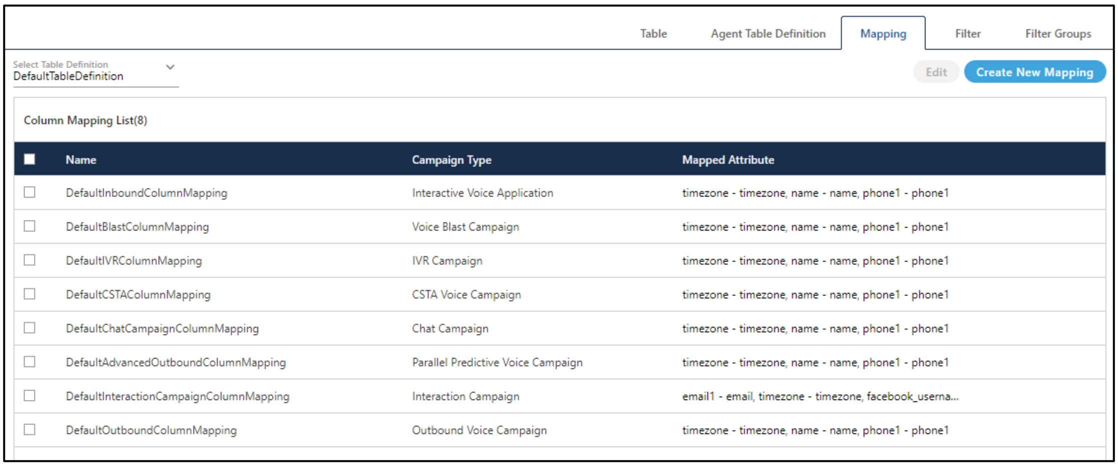


Figure: Table Mappings

- ## Modify Table 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".

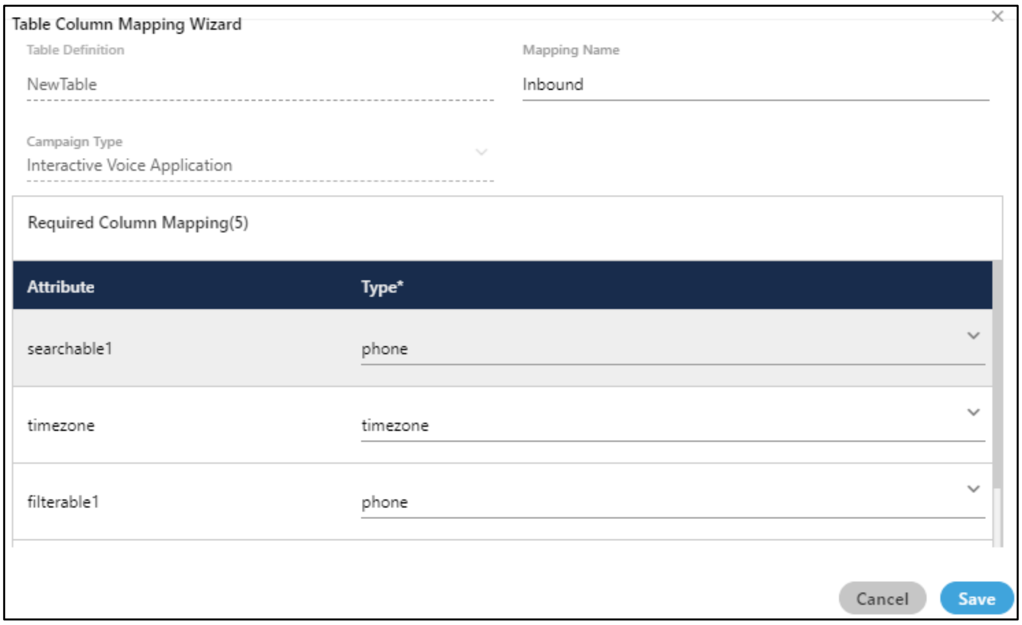


Figure: Edit a Table Column Mapping

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.

5.1.4.4.2 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 definition (DefaultTableDefintion).

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

Figure: Asking to delete a Table Column Mapping

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

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

5.1.4.5 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 "Customers" Tab in the Settings of these campaigns. Know more...

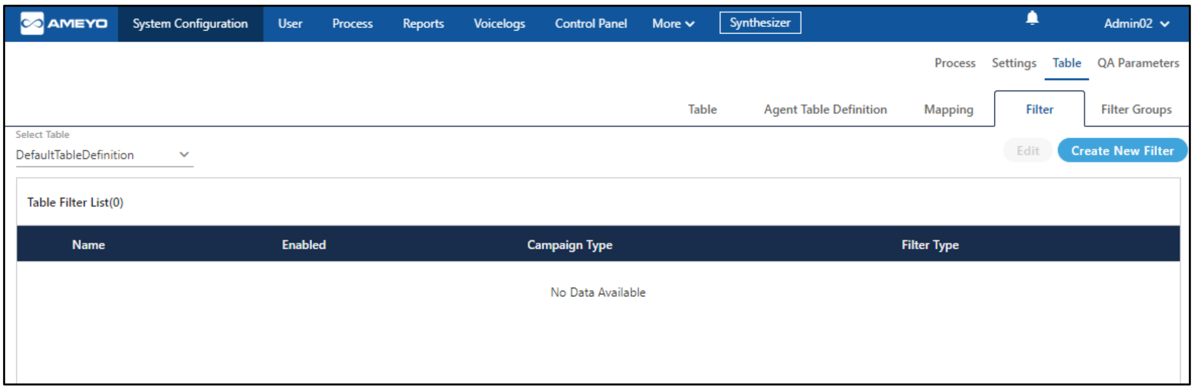


Figure: Table Filters

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

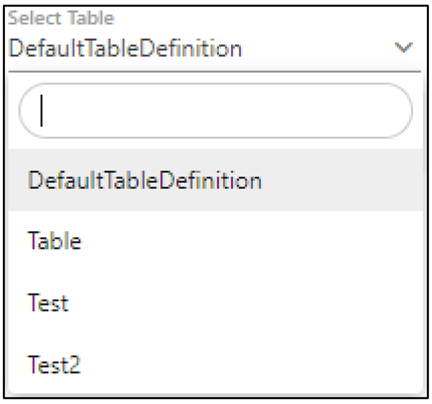


Figure: Select Table Definition

You can use search box in the top row to search for the particular table definition.

5.1.4.5.1 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.

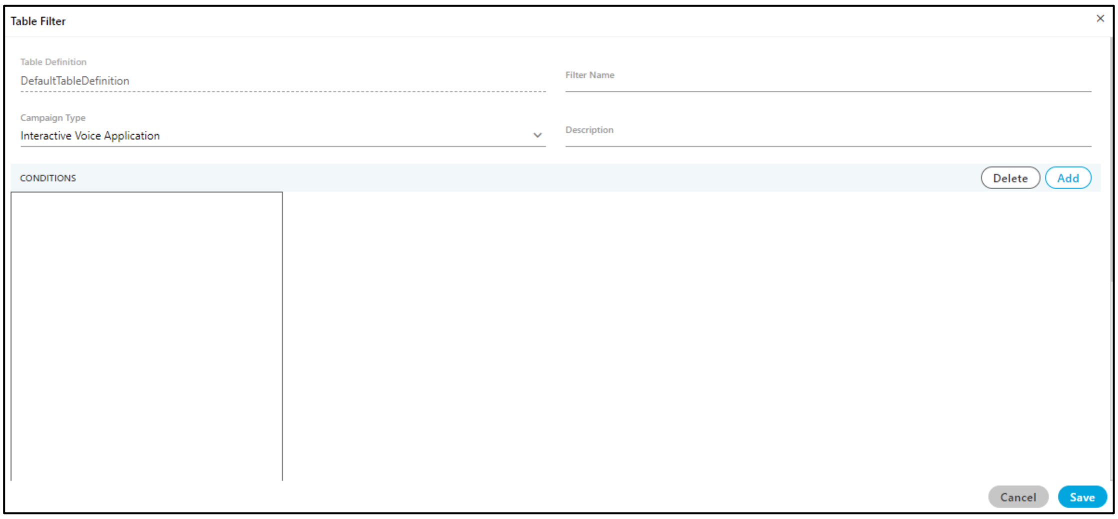


Figure: Create a Table Filter

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. After selecting "Left Operand", you have to provide a value for that operand in the cell under "Condition" column. The value should contain a operator such as =, < or >. The following table shows some examples of some operands.

Operand	Value
ATTEMPTS	='1'
	<'1'
	>'1'

 |

CustomerID	='1234'
	<'1234'
	>'1234'
Phone1	='2111155555'
	<'2111155555'
	>'2111155555'

III. **Table:** Sample Values of Operands

If you do not add operator or single quotes, you may get error while adding or modifying the table filter.

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

VI. 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.

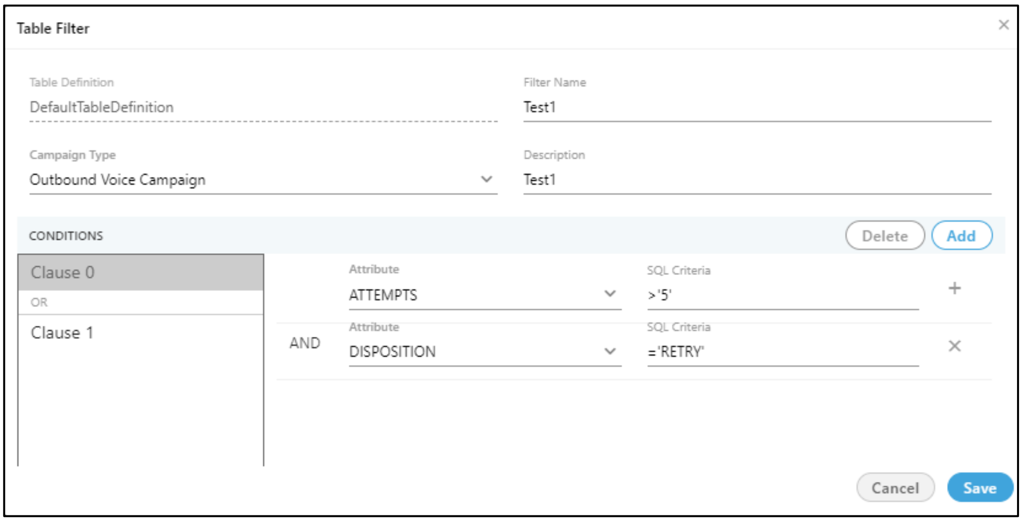


Figure: Creating Table Filter

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

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

You can create the multiple table filters.

5.1.4.5.2 Enable or Disable a Filter

Perform the following steps.

1. Select a table filter in the list.

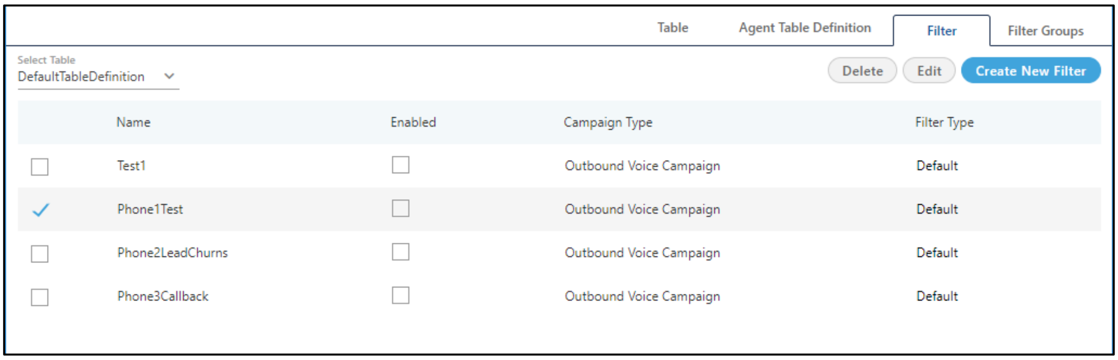


Figure: Select a Table Filter

2. Check the box titled "Enable" to enable the table filter.

3. Alternatively, you can keep "Enable" box unchecked to keep the table filter disabled.

5.1.4.5.3 Modify a Table Filter

Perform the following steps.

1. Select a table filter in the list.

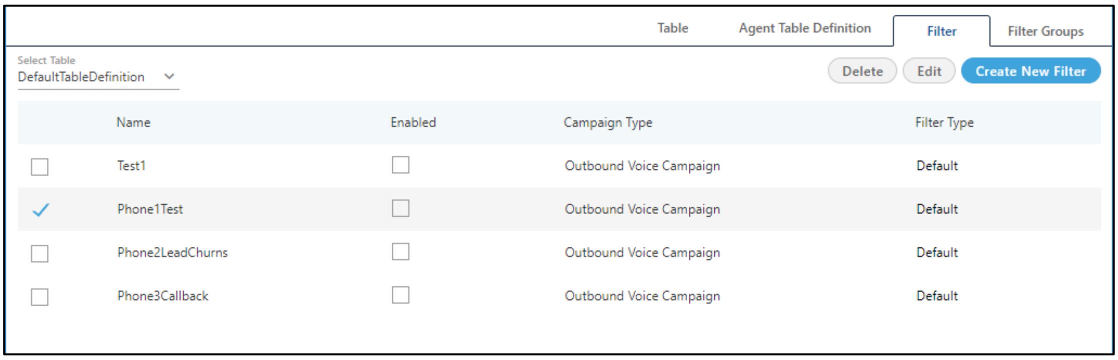


Figure: Select a Table Filter

2. Click "Edit" button on top right corner to edit the table filter. It shows the following pop-up.

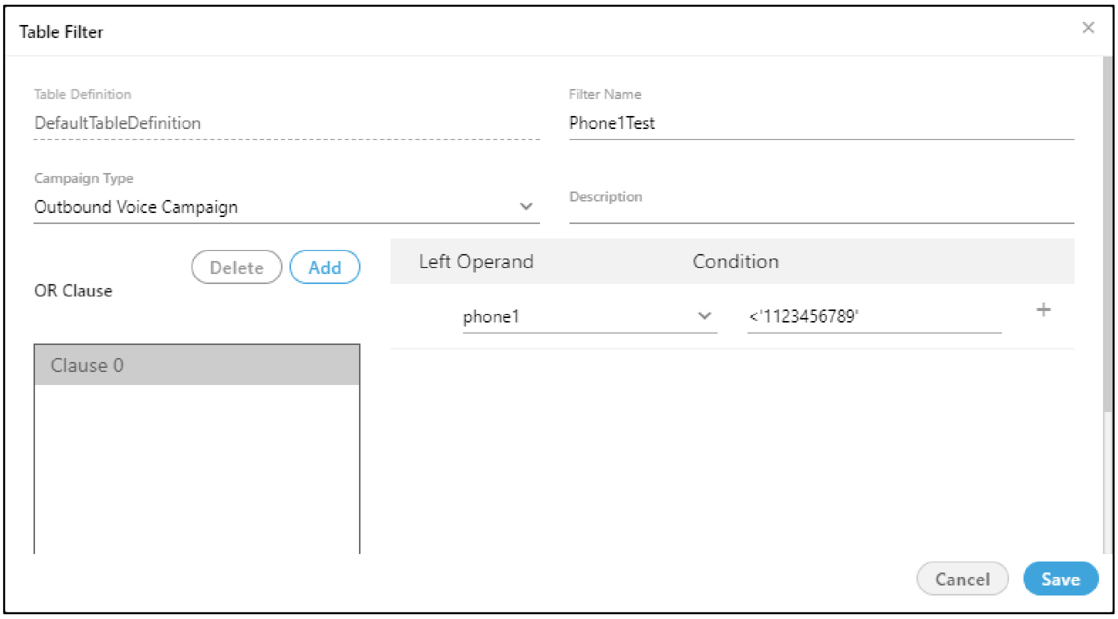


Figure: Modify a Table Filter

3. You can change the following items here.

    A. Filter Name

    B. Campaign Type

    C. Description

    D. Left Operand

    E. Value

    F. Clause

4. Click "Save" to save the modified table filter.

5.1.4.5.4 Delete a Table Filter

A deleted table filter cannot be restored. If the table filter is being used in any campaign to filter the leads, then the filtration will not work after deleting the table filter.

Perform the following steps.

1. Select a table filter in the list.

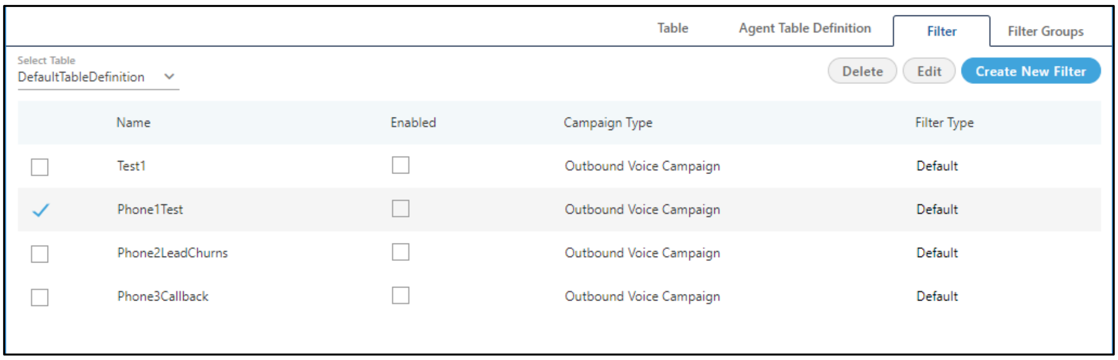


Figure: Select a Table Filter

2. Click "Delete" button on top right corner to edit the table filter. It shows the following warning message.

Figure: Warning before deleting a Table Filter

3. Click "Yes" to delete the table filter.

5.1.4.6 Table Filter Groups (Licensable)

In Ameyo 4.6, the Filters to filter the leads can now be grouped. This Filter Grouping allows the businesses to achieve the next-level for prioritizing the dialing of their leads. Single or Multiple Filter Groups can be created at both System-level (by the Administrator) and Campaign-level (by the Supervisor). The Filter Groups created at the System-level by the Administrator can be assigned to Outbound, Parallel Predictive Dialing, and Voice Blast Campaigns. For it, the Administrator has to activate the Filter Groups and assign the selected Filter Groups in "Customers" Tab in the Settings of these campaigns.

Here, in "System Settings" → "Table" → "Filter Groups", you can create and manage the Filter Groups at the System-level by the Administrator.

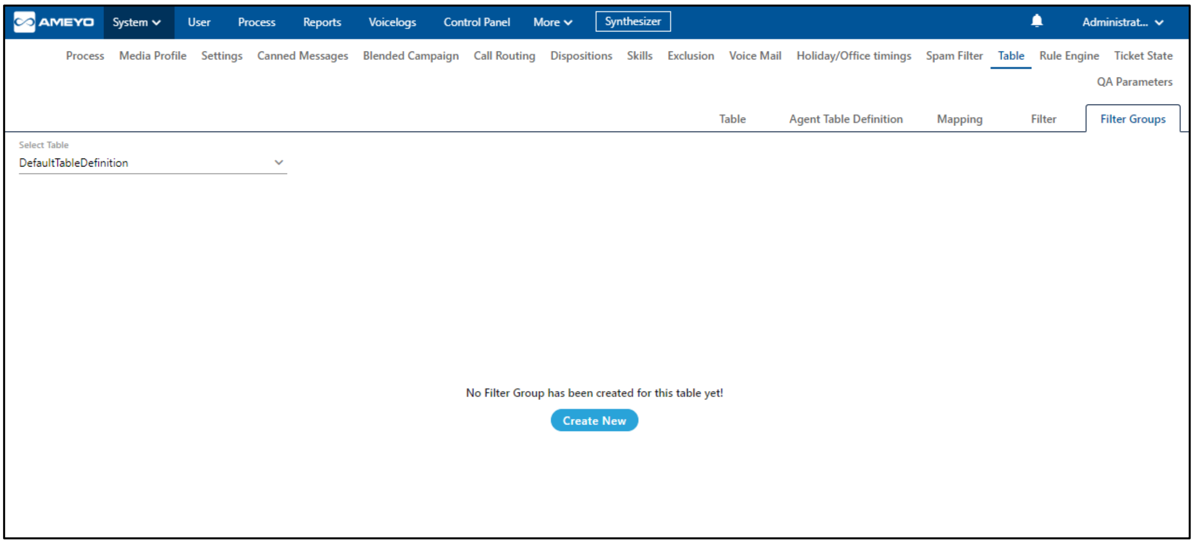


Figure: Table Filter Group

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

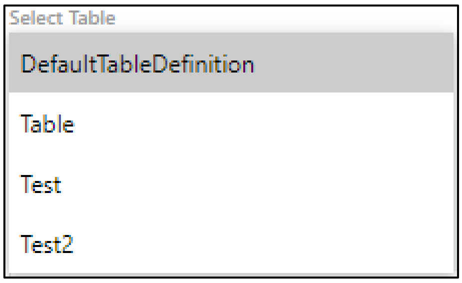


Figure: Select Table Definition

5.1.4.6.1 Create Filter Group

Performs the following steps to create a new Filter Group.

1. Select the table definition.
2. Click "Create New" to create a filter group.

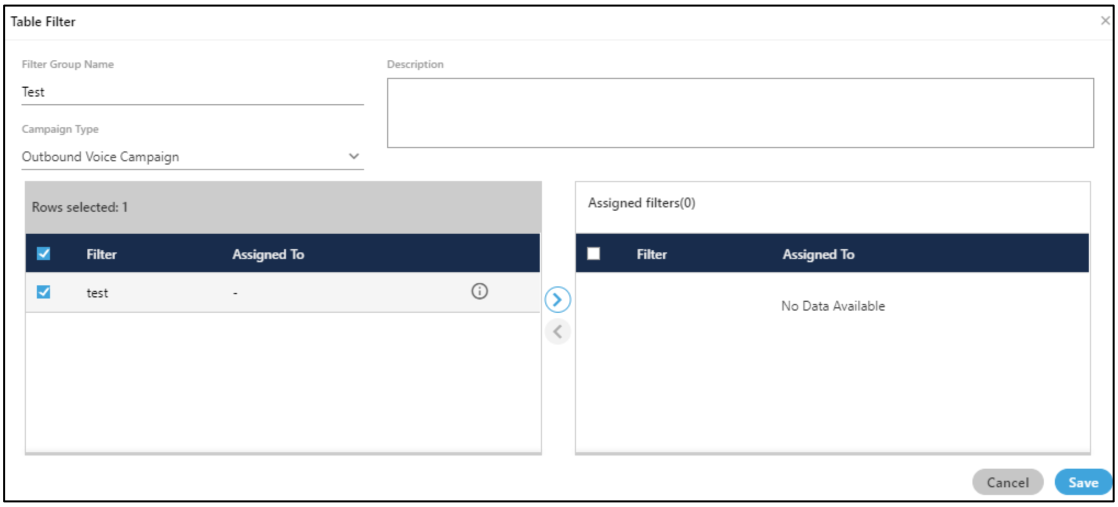


Figure: Create a Filter Group

3. Provides the following inputs.

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

    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

The selected campaign will show the Filter Groups and Filters created in that campaign only.

4. The Filters in "Available Filters" will be listed as per the selected campaign.

5. You can hover the mouse over icon to see the information about a filter in the following pop-up.

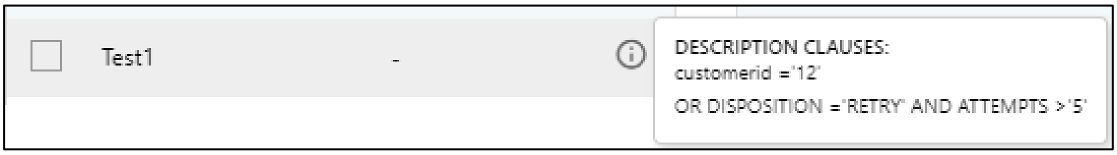
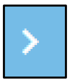
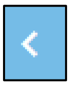


Figure: See Information of a Table Filter

6. Select the required Table Filters in "Available Filters" section and click  icon to add them in the Filter Group.
7. To remove the Table Filters from a Filter Group, select the required Table Filters in "Assigned Filters" section and click  icon.
8. Click "Save" to create the Filter Group. Following screenshot contains the sample values to create a Filter Group.

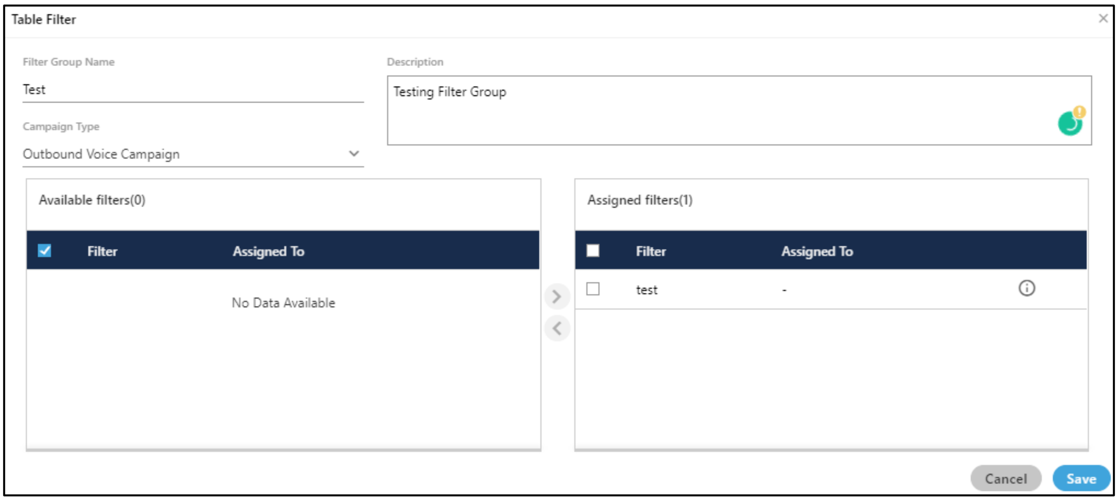


Figure: Creating Filter Group

9. Click **"Save"** button to create the Filter Group.

   Alternatively, you can click **"Cancel"** button to not create it.

The following screenshot shows the created Filter Gruops

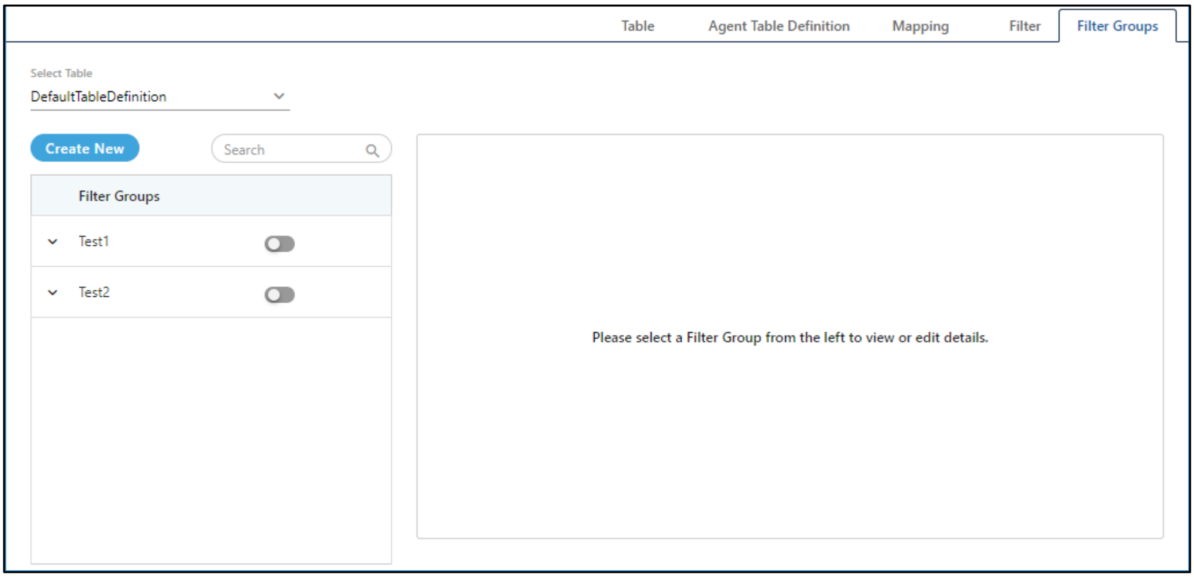


Figure: Created the Filter Groups

5.1.4.6.2 View the Details of a Filter Group

The left section shows the list of created Filter Groups. The Administrator can click icon to expand the details. When you select a Filter Group, it shows the further details in the right section of the window.

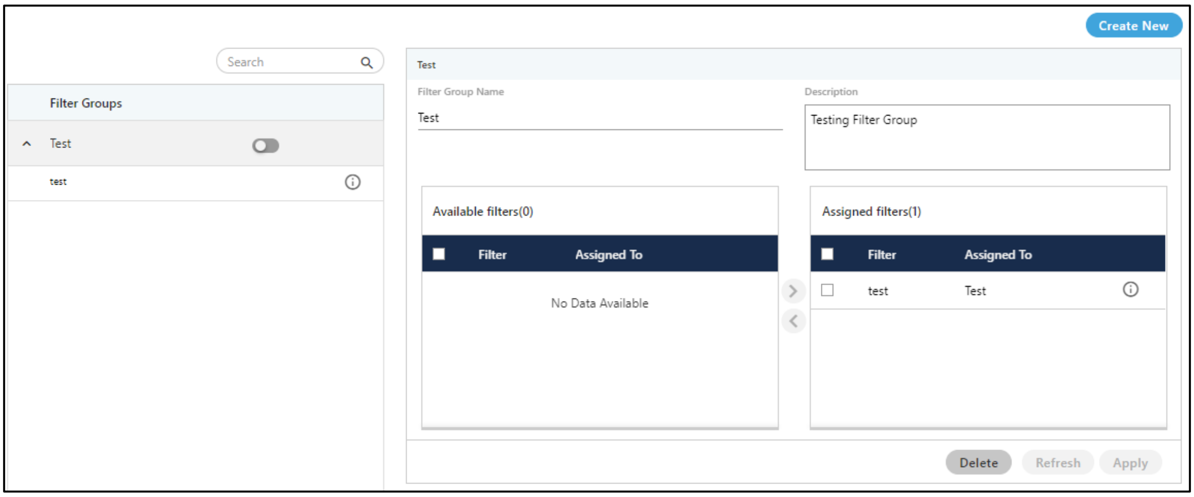


Figure: Details of a Filter Group

Hover the mouse over icon for a member filter to view the detais of that filter.

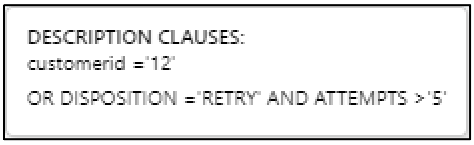


Figure: Information of the Member Filter in a Filter Group

You can click icon to collapse the expanded filter group.

5.1.4.6.3 Enable or Disable a Filter

You can enable or disable a Filter Group. You can click switch to enable the Filter Group. After enabling, the color of that toggle changes to green.

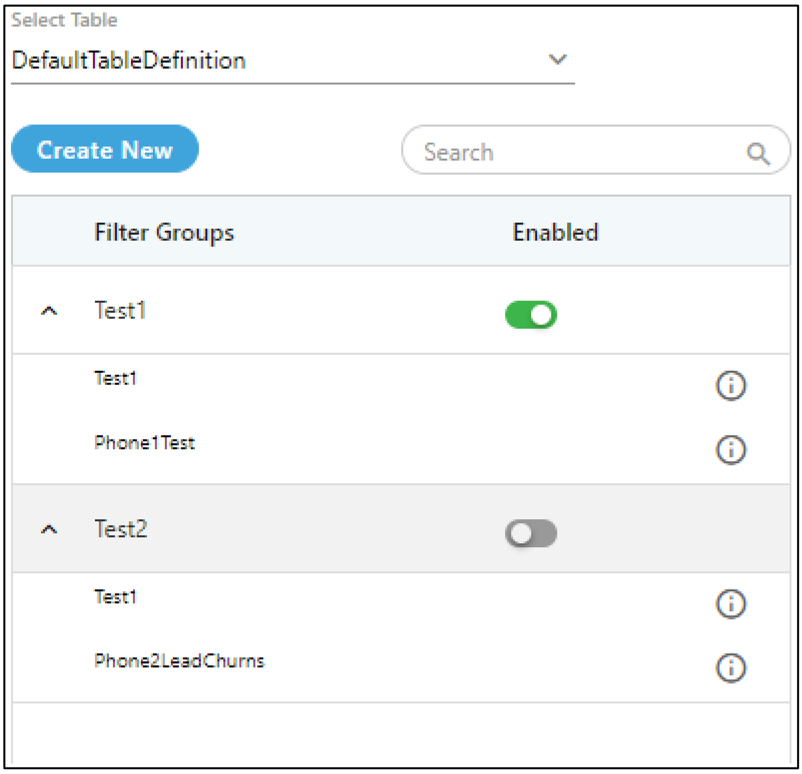


Figure: Enable or Disable a Filter

To disable a Filter Group, click switch to disable the Filter Group.

5.1.4.6.4 Modify a Filter Group

By default, the filter group is not selected, you have to select it manually. Perform the following steps to modify a Filter Group.

1. Select a Filter Group in the left pane.

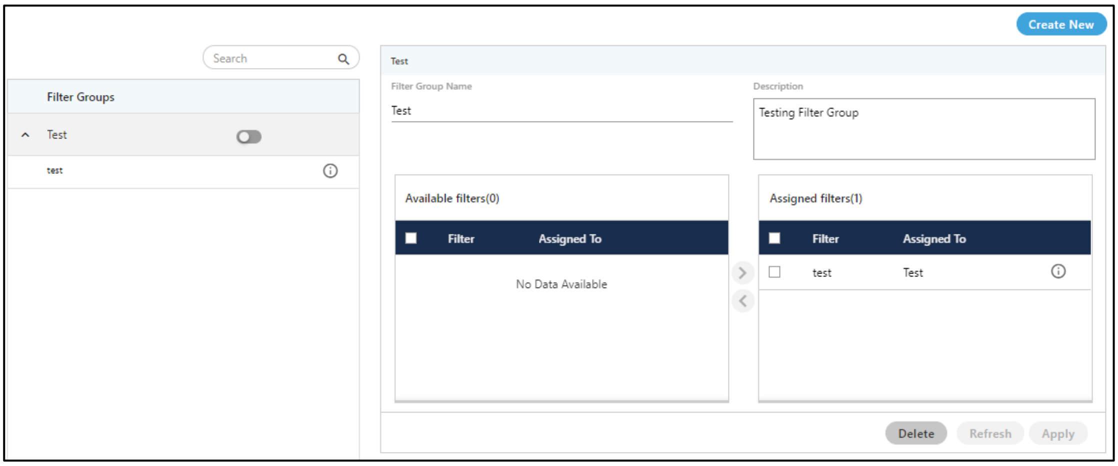


Figure: Selected a Filter Group

2. Click "Edit" button on top right corner to edit the filter group. It shows the following pop-up.

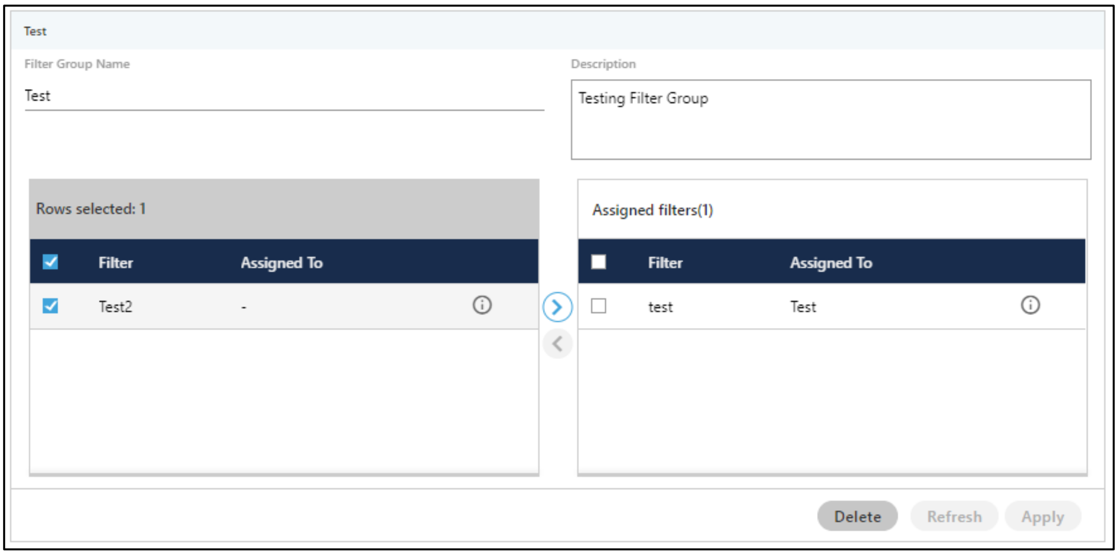


Figure: Modify a Filter Group

3. You can change the following items here.

   A. Filter Group Name

B. Description

4. Select the Filter Groups in "Available Filters" section and click icon to assign the filter from the Filter Group.
5. To unassign a filter from the Filter Gruop, select a filter in "Assigned Filter" section and click icon to unassign the filter from the Filter Group.
6. After making the changes or changing the Filter Members, click "Save" to save the modified filter group.

5.1.4.6.5 Delete a Filter Group

A deleted Filter Group cannot be restored. If the Filter Group is being used in any campaign to filter the leads, then the filtration will not work after deleting the same.

Perform the following steps to delete a Filter Group.

1. Select a Filter Group in the list.

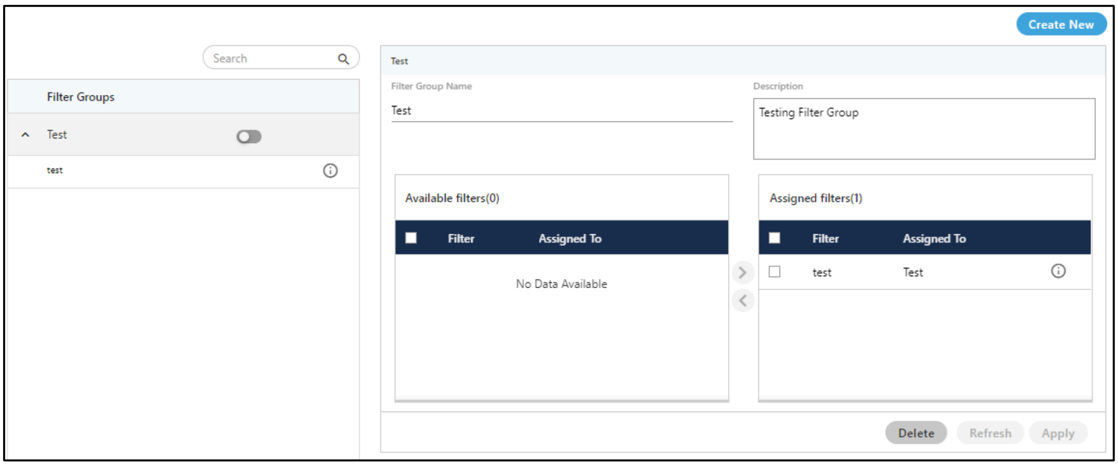


Figure: Select a Filter Group

2. Click "Delete" button in the bottom right corner in the right pane. It shows the following warning message.

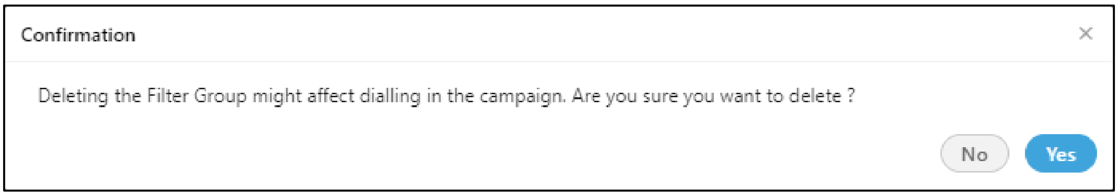


Figure: Warning before deleting a Filter Group

3. Click "Yes" to delete the filter group.

5.1.5 (Licensable) QA Parameters in System Configuration

Administrator can define different quality parameters which help the Analyst or other Authorized Users to provide the quality rating for every customer communication with the agents. This feature is licensable, hence for further information on the same, contact Ameyo support team.

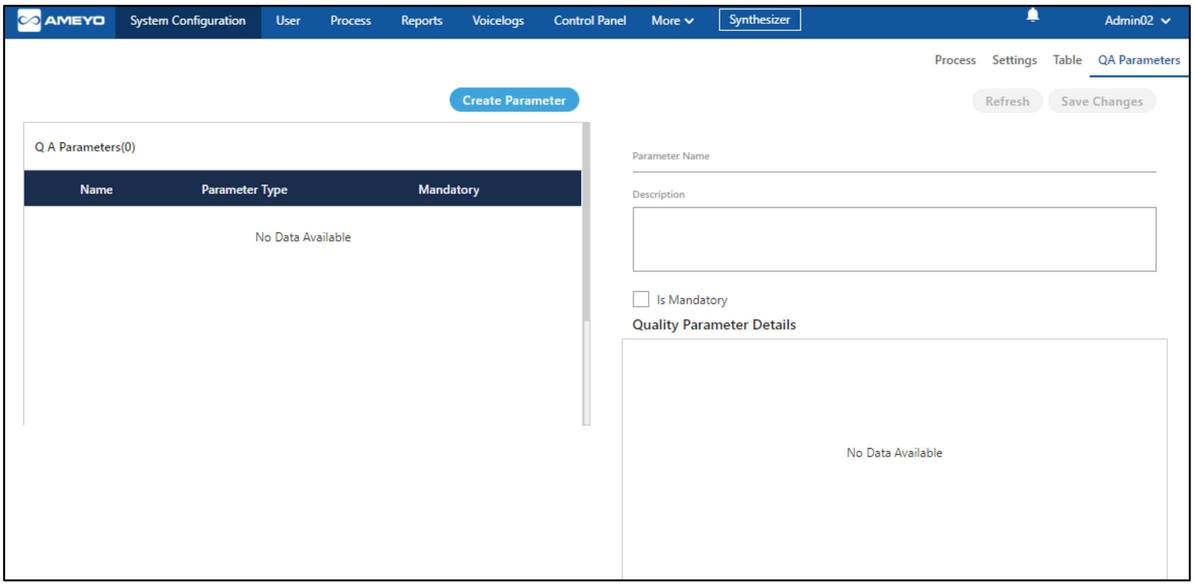


Figure: Quality Parameter Tab

5.1.5.1 Create Quality Parameter

Administrator can create new parameter by performing the following steps.

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

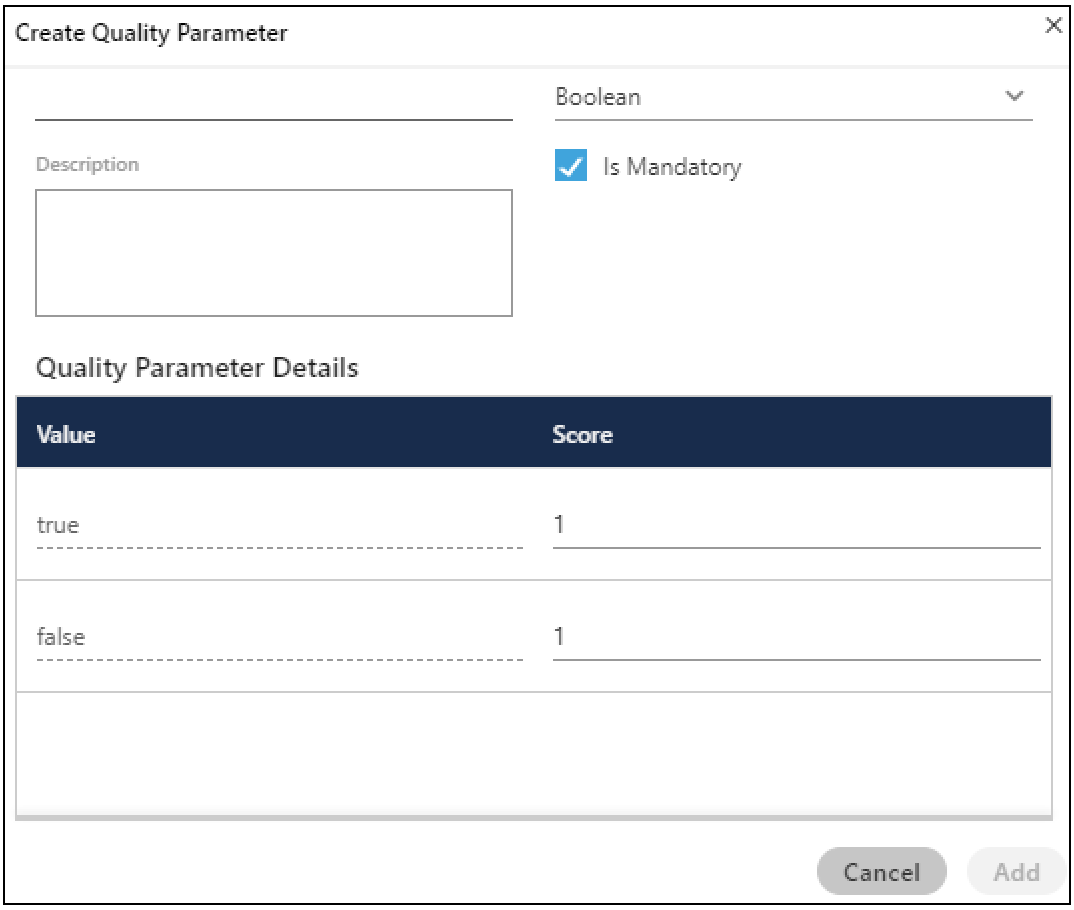


Figure: Create Quality Parameter

2. **Parameter Name:** Enter the name of parameter.
3. **Description:** Enter the description of parameter.
4. **Is Mandatory:** Check the check box if this parameter has to be made mandatory, which means the Analyst or Supervisor has to rate the call.

5. **Parameter Type:** Select the parameter type from the drop-down menu. After selecting a value, the interface gets changed. It contains the following options.

    A. **<u>Boolean</u>:** Select it to create a boolean-based Quality Parameter, whose value can be given in True or False. After selecting the boolean, provide the values for true and false.

    B. **<u>Multiple</u>:** Select it to create a Quality Parameter, which can contain multiple vaules.

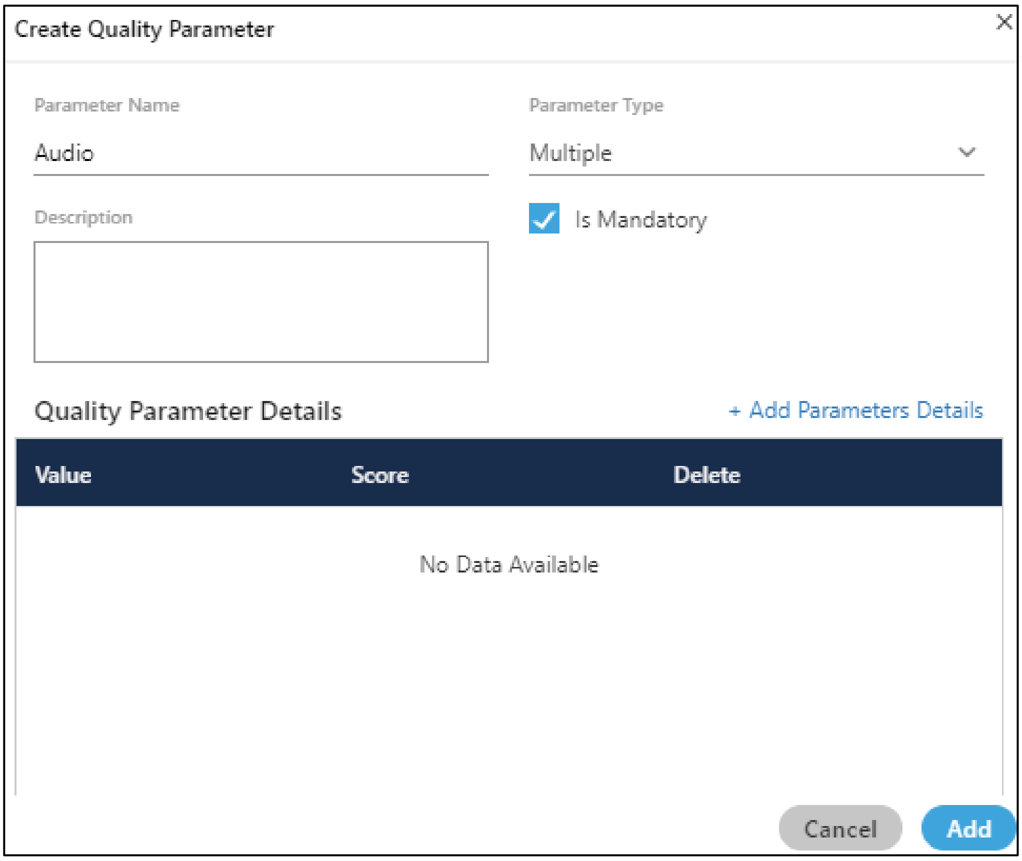


Figure: Multiple-based Quality Parameter

Perform the following steps.

I. Click "+Add Parameter Details" link. It adds a new row in the blank area.

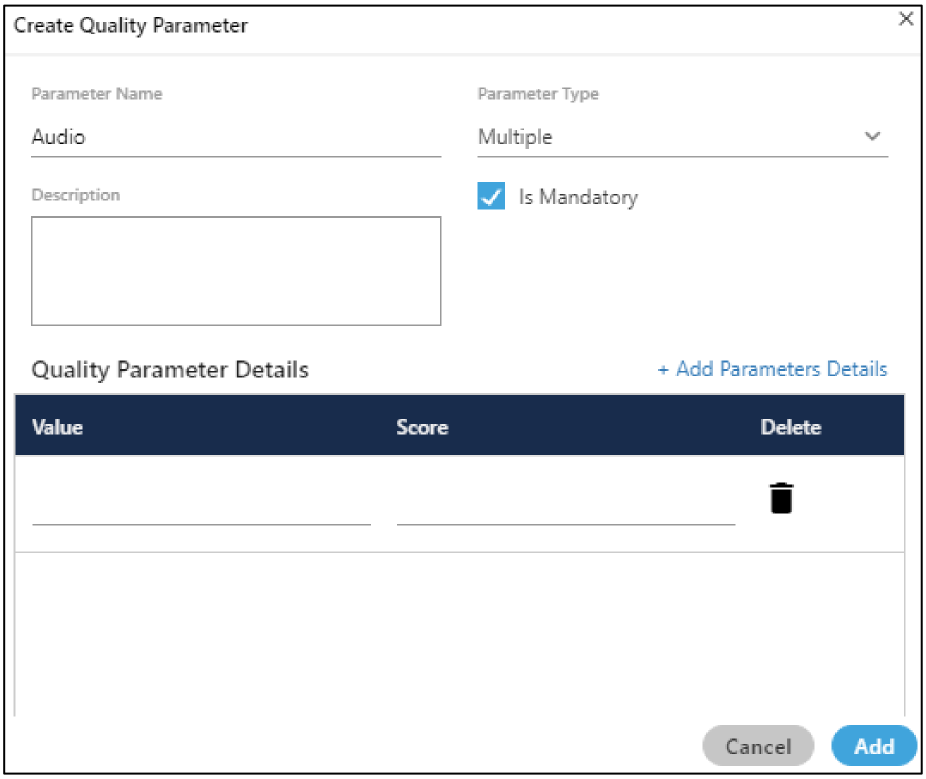


Figure: Add Details of Multiple-based Quality Parameter

II. Provide the value and score. For example, the value can be in text format and the score can be in numeric format such as "Poor" can be the value and "1" can be its score.

III. Click "+ Add Parameter Details" link again to add one more row containing value and score.

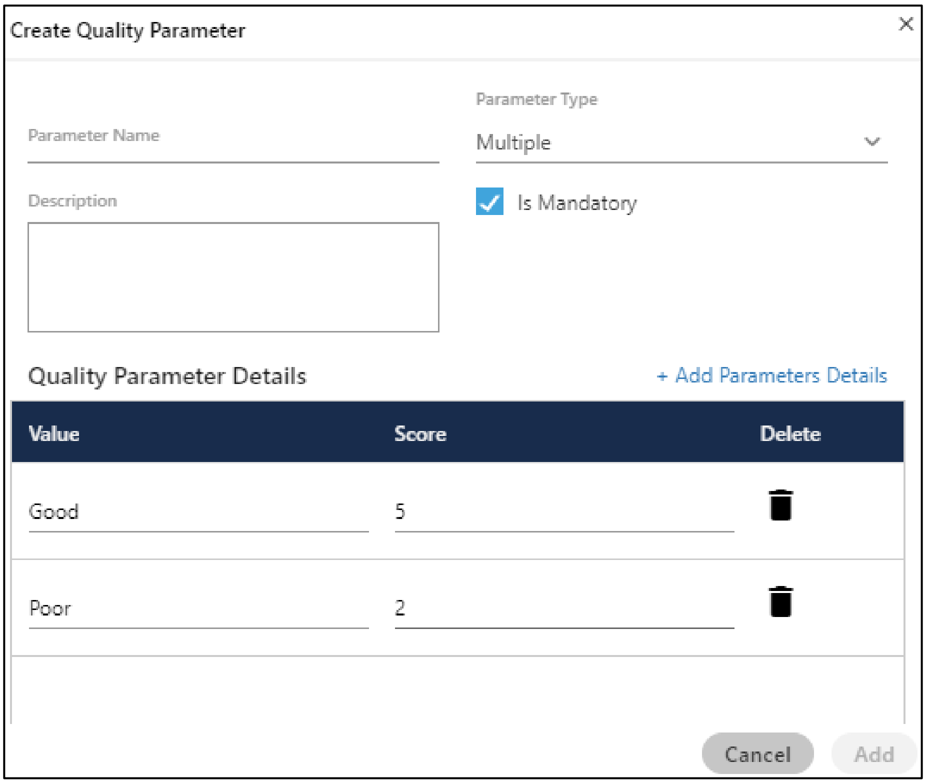


Figure: Multiple Values in a Quality Parameter

IV. To detele a parameter detail, click icon.

C. **Comment:** Select it to create a Quality Parameter, which can accept and store comments about the quality of customer communication.

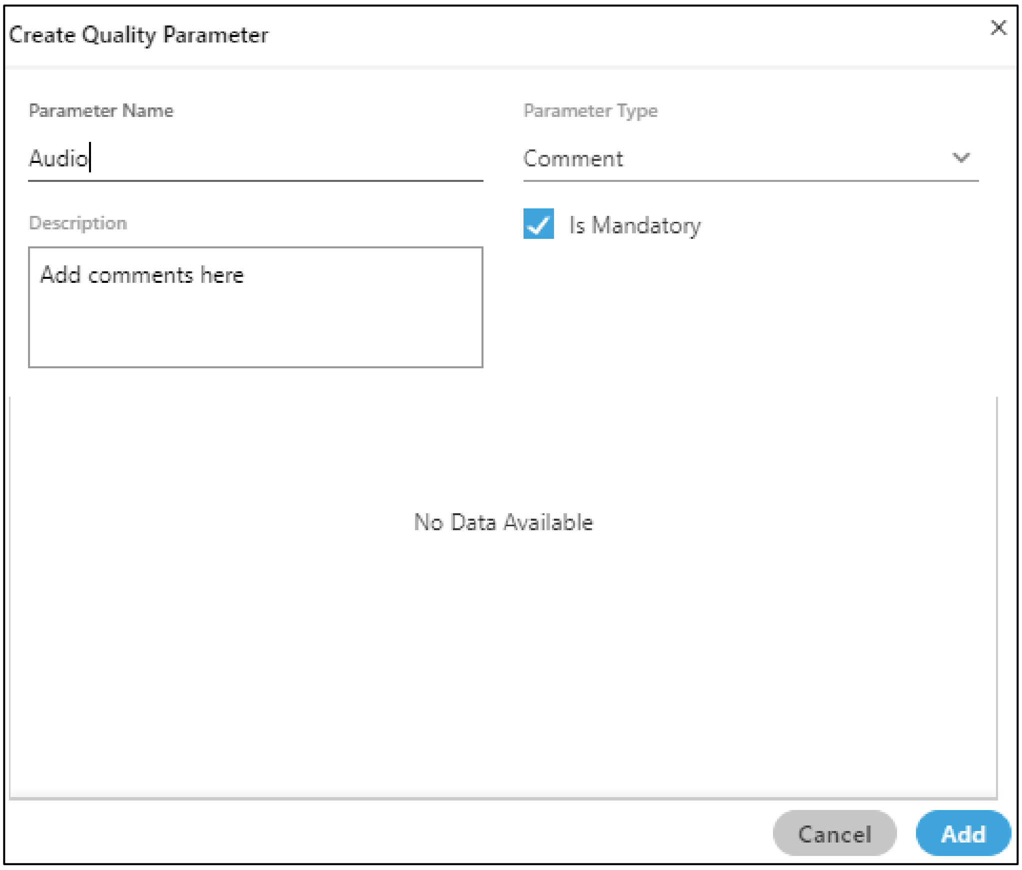


Figure: Comment-based Quality Parameter

D. **Range:** Select it to create a range-based Quality Parameter.

You can specify the minimum and maximum range.

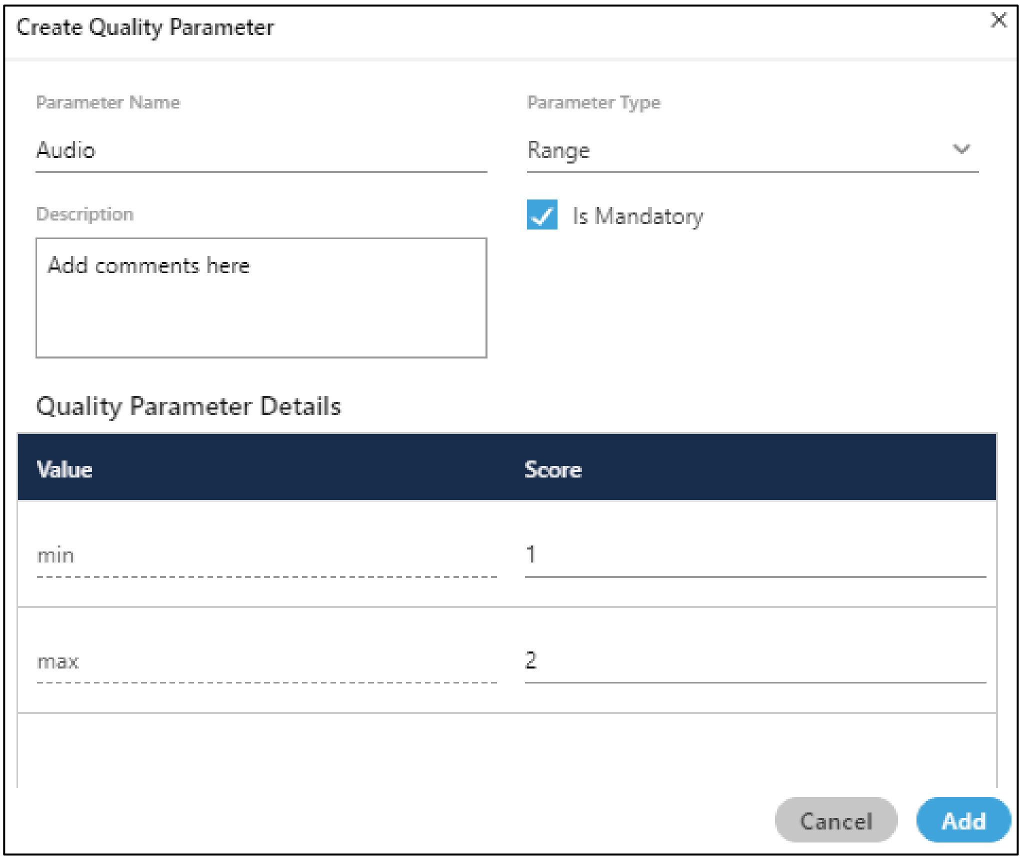


Figure: Range-based Quality Parameter

6. Click "Add" button to add the parameter.

   Following screenshot shows newly created quality parameters.

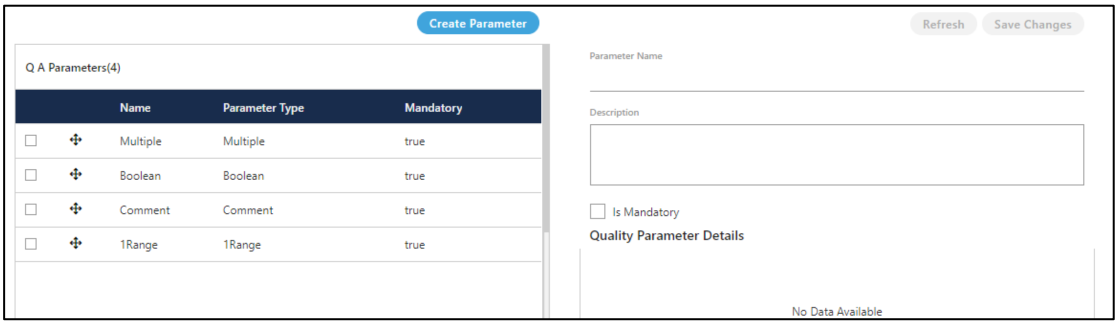
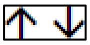


Figure: List of QA Parameter

7. Select the QA Parameters to view its details.

5.1.5.2 Change Priority of Quality Parameters

Each Quality Paramter has  in the list. The Administrator can click ↑ to increase the priority for a Quality Parameter and ↓ to down its priority.

5.1.5.3 Modify Quality Parameter

You can click the checkbox of a quality parameter to view its details in the right section.

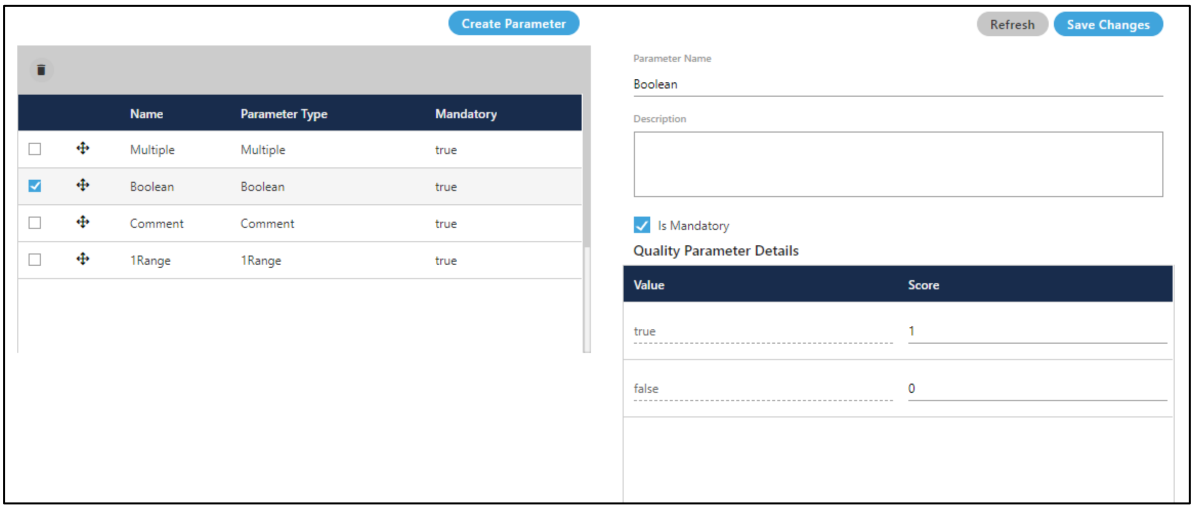


Figure: Modify QA Parameter

You can modify the following details.

1. Name
2. Description
3. Make it optional by unchecking "IsMandatory" or make it mandatory by checking "IsMandatory".
4. If it is a Boolean-, Multiple-, or Range-based Quality Parameter, then you can change its value and score.

Click "Save Changes" button on the top-right corner to save the changes. Rather, you can click "Refresh" to discard the changes.

5.1.5.4 Delete Quality Parameter

The deleted Quality Parameter cannot be restored.

Perform the following steps to delete a quality parameter.

1. Select a quality parameter in the list.
2. Click "Delete" to delete the quality parameter. It shows the following pop-up.

Figure: Delete QA Parameter

3. Click "Yes" to delete the quality parameter.

   Click "No" to not delete the quality parameter.

6. User and Group Configuration

The Administrator can create new users and their groups from existing users of Ameyo system.

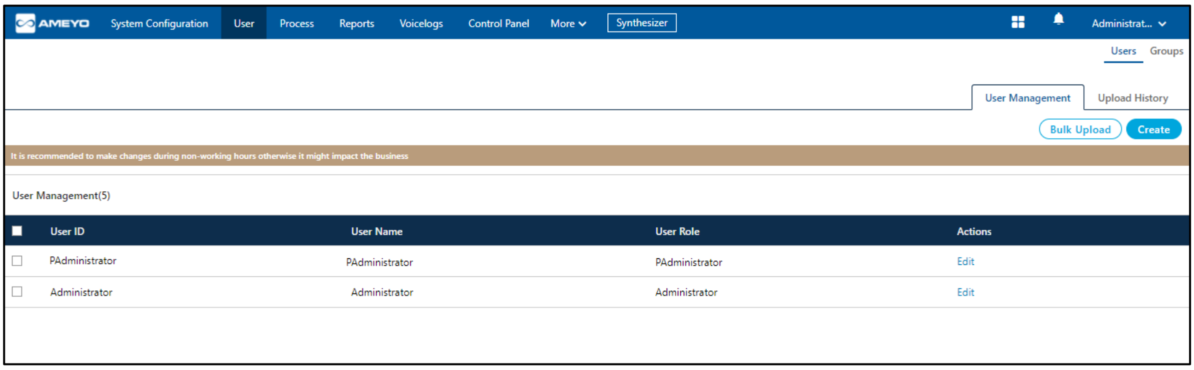


Figure: User Management

The administrator can perform the following steps from here.

1. **Users:** This tab allows the Administrator to create and manage the user accounts in Ameyo. Know more...
2. **Group Management:** This tab allows the Administrator to create and manage the user groups in Ameyo. Know more...

6.1 Users

The Administrator can create, edit, and delete the users from here. The administrator can also view the history of bulk upload users.

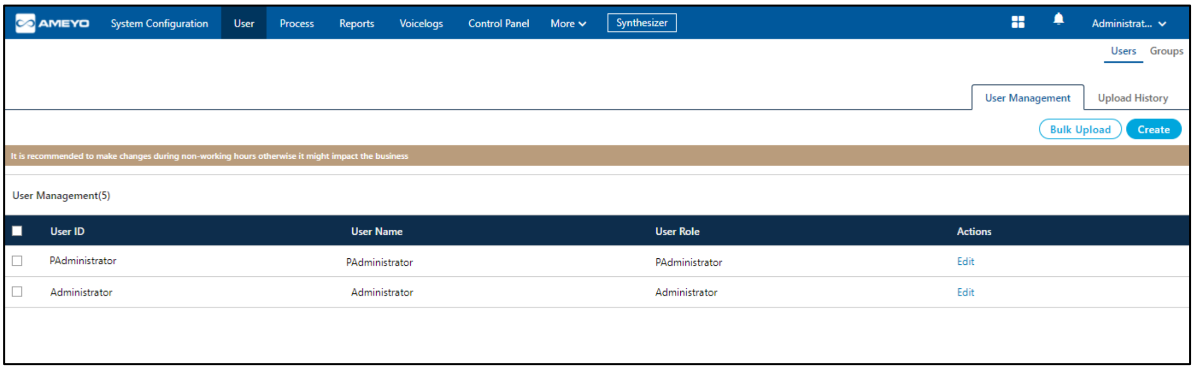


Figure: User Management

The administrator can perform the following steps from here.

1. **User Management:** This tab allows the Administrator to create and manage the user accounts in Ameyo. Know more...
2. **Upload History:** This tab allows the Administrator to view the user upload history. Know more...

6.1.1 User Management

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

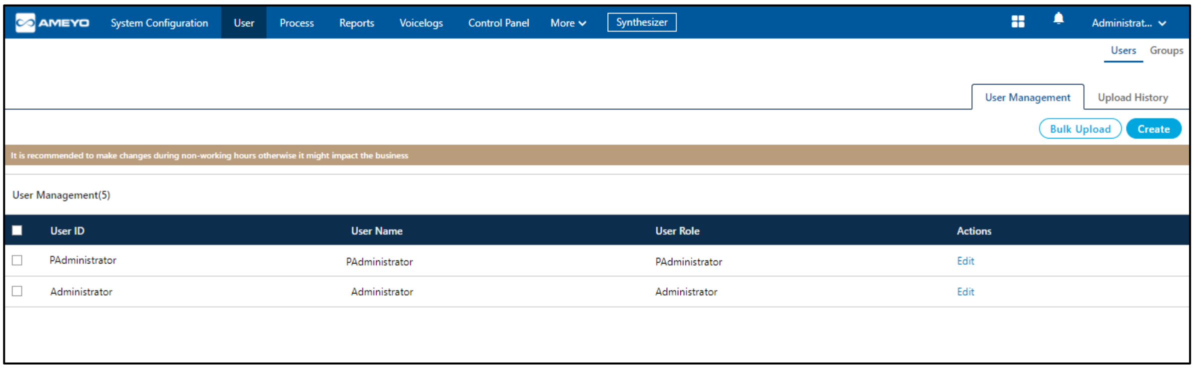


Figure: User Management

6.1.1.1 Add User

To add a new user, click "Add User" button.

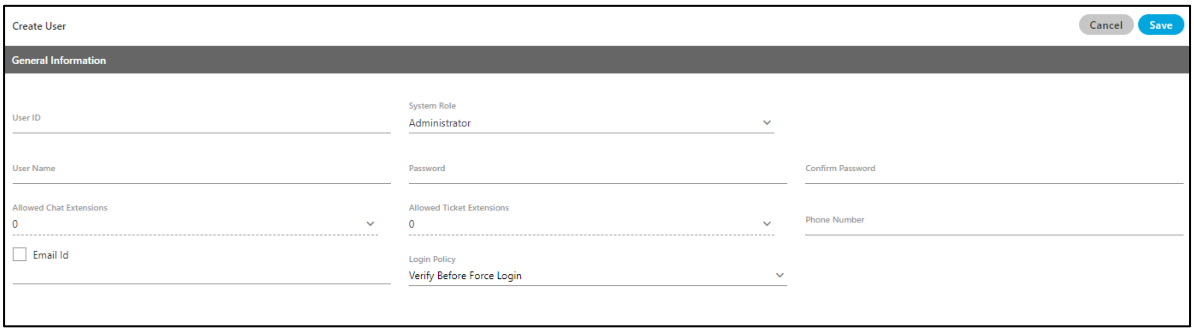


Figure: Add a User

Perform the following steps.

1. Enter the User ID, User Name in the provided text boxes.
2. 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.

As per the license model in Ameyo, you can create the following users.

License-based User	Actual User Type in Ameyo
Voice User	Professional Agent
	Executive Agent (to be available in two voice campaigns without Blended Campaign option)
Email User	Professional Agent
Chat User	Professional Agent
Social User	Professional Agent
Universal User	Professional Agent
	Executive Agent (to be available in two voice campaigns without Blended Campaign option)

- **Administrator**: As the name suggests, the user with the administrator user rights is the head of all the Ameyo and is able to do everything in the system.
- **MAdmin**: MAdmin is the mini-administrator who has some privileges like the administrator but does not have the complete authorization like administrator.
- **Voice Admin**: All the voice related administration level works are allowed to be done by the voice-admin user.

- **Analyst**: The analyst is the user who analyses the complete work done by the agents.
- **Professional-Agent**: The professional agent is the user who is professional in handling multiple customers and their calls at the same time while assigned in the multiple campaigns.
- **Executive**: The executive is the person who is allowed to interact with the customer.
- **Supervisor**: The supervisor is the user who has the privileges to monitor the work of the agents which are assigned under him.
- **UAM-Maker**: The UAM-Maker (User Access Manager) user has the privileges to the create the users and assign them to their respective campaigns so that they, can work accordingly.
- **UAM-Checker**: The UAM-Checker (User Access Manager) has to approve the users created by UAM-Maker.
- **Customer Manager**: The Customer Manager is used to run the Customer Manager API.
- **Group Manager**: The combination of multiple voice agents is known as group, and the group manager monitors the activity of the agents assigned in that group.

3. Enter the password in the provided text box and confirm the password by re entering the same in "Confirm Password" text box.
4. Enter the description about the user in the provided text area.
5. Select the Allowed Interaction Extensions from the drop down field. Allowed Interaction Extension means that number of media interactions that is chat, mails, social media etc. can a Agent handle.

6. Select the number of Ticket Extensions which a user can handle at a time.

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

8. **Phone Number:** The administrator can provide the phone number of the agent here.

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

10. Click "Save" to add the user.

11. Click "Cancel" to discard the changes.

6.1.1.2 Modify User

Administrator can modify 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. It shows the following pop-up.

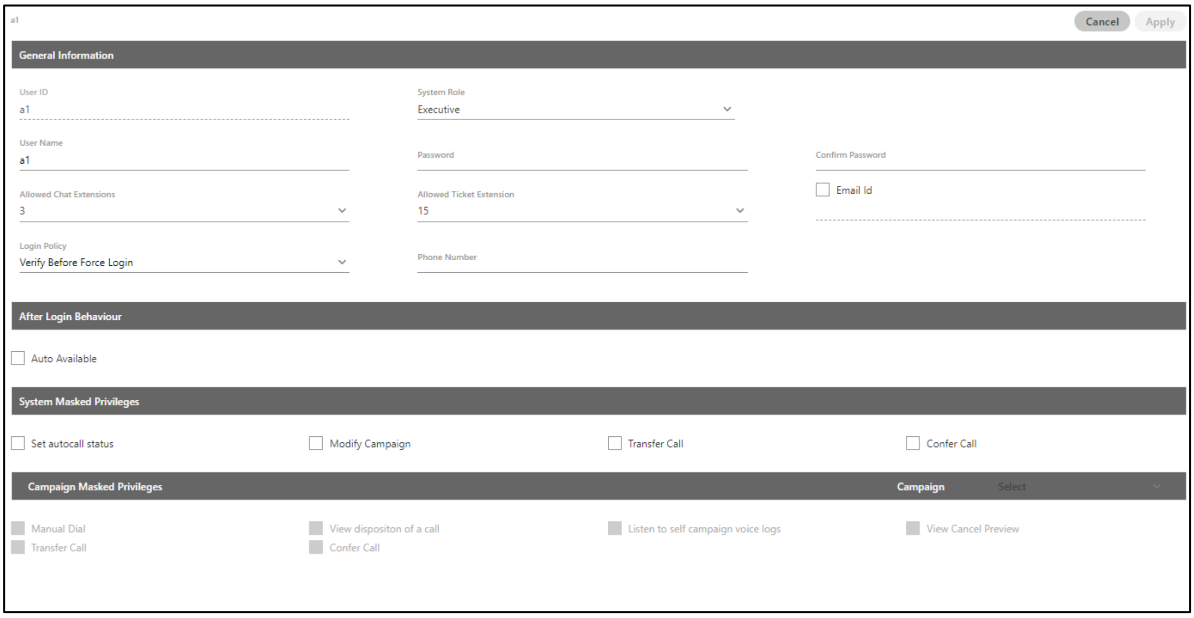


Figure: Modify a User

Following information can be modified.

1. **General Information:** Under this category, the following fields can be modified.
    A. System Role
    B. User Name
    C. Password
    D. Allowed Chat Extensions
    E. Allowed Ticket Extensions
    F. Check or uncheck "Email ID" field
    G. Add, modify, or delete Email Address
    H. Phone number of the user
    I. Change Login Policy
2. **After Login Behaviour:** Here, you can check "Auto Available" to make the user auto-available after the login. Keep it uncheck to not make it auto-available after the agent login.
3. **System Masked Privileges:** The administrator can restrict the user from some actions related with system. Enable the checkboxes to restrict the user from the following restrictions.

    2.

    - **<u>Set autocall status</u>:** It restricts the user to change the status of the auto call. It means that the user is not able to change the status of the auto call, the status set either by supervisor or administrator remains available.

- **Modify Campaign:** It restricts the user to change the campaign after login to another campaign. It means that the user is not able to change the campaign even if the user is assigned in multiple campaigns. Now, if the user selects the campaign at the time of login remains available only. The option to change campaign for the user from the main menu remains disabled.
- **Transfer Call:** It restricts the user to transfer the call.
- **Confer Call:** It restricts the user to confer the call.

3. **Campaign Masked Privileges:** The administrator can restrict some actions for particular user of the campaign (in which respective user is assigned) by simply checking the respective checkboxes.

   Select the campaign from the drop down list of the available campaigns in which user is assigned. Following privileges can be restricted for any user:

   - **Manual Dial:** If the user is masked for the Manual Dial feature then the user is not able to dial the call to any customer from that campaign manually(auto call does not have any impact of this feature). This feature is useful for the users of "Inbound" type campaigns.
   - **View disposition of a call:** If this feature is enabled for any user, then that user is not able to view the dispositions for the call so that the user is not able to dispose off the call from the disposition list of dialer but the user is allowed to dispose the call from CRM in that campaign.
   - **Listen to self campaign voice logs:** If the user is masked from this feature then the user is not able to listen to the

voicelogs which are created from the calls handled by that user. The option to listen to the voicelogs remains unavailable for that user.

- **View Cancel Preview:** It masked the user to cancel the preview of the customer's details. It means that the user is not able to cancel the preview in the case of "Preview dialing" algorithm.
- **Transfer Call:** It restricts the user to transfer the call.
- **Confer Call:** It restricts the user to confer the call.

If the "Confer Call" privilege has been masked for a Supervisor, then the "Call Conference" for that Supervisor will also be masked in "Live Monitoring" Tab.
It is a Campaign-level Privilege, which can be configured here. The change made by a Supervisor for this privilege will override the privilege configured by the Administrator.
If a user is assigned in multiple campaigns and administrator wants to mask the user from multiple campaigns, then you have to mask the user from all the campaigns one by one.
These features are available for all other users except administrator.

4. **Voice Mail Configurations (Licensable):** 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.

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

   Rather, click "Cancel" to discard the changes.

6.1.1.3 Delete User

The deleted user cannot be restored. The deleted user will not be able to login to the Ameyo System.

Perform the following steps to delete the user.

1. Select the user to be deleted by checking the checkbox.
2. Click "Delete" to delete the selected user. It shows the following warning message.

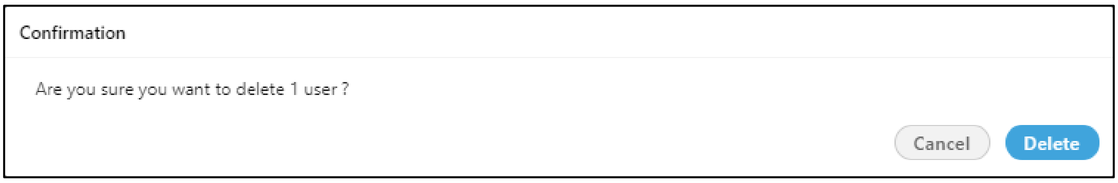


Figure: Warning before deleting a User

3. Click "Yes" to delete the user.

6.1.1.4 User Card

After the creation of the user, the user card is displayed while hovering the mouse on the user name of the user. Following screen is displayed while hovering the mouse over the username of the user.

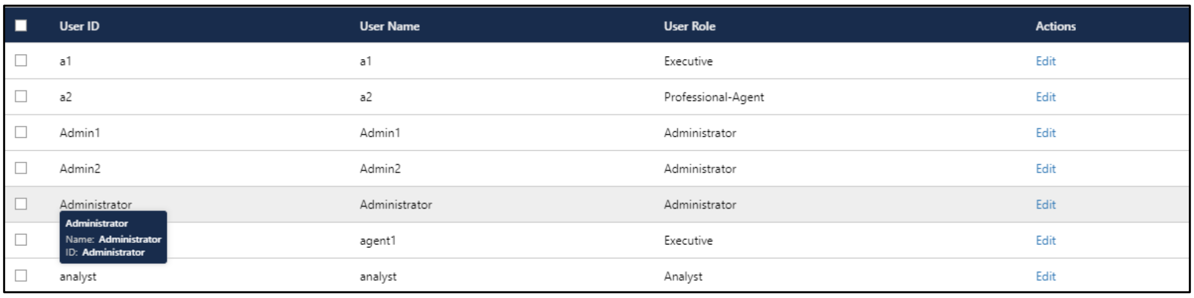


Figure: User Card

The user card contains the user-role, username, and userID.

6.1.1.5 Bulk Upload

The bulk creation of users feature allows the administrator to create users in bulk in a single time. The administrator has been given an option from where he can upload the user identities with the help of a CSV. In this CSV file, the administrator can define all the fields required to be filled for the creation of the users. The administrator can also provide the metadata fields of the users.

Perform the following steps to upload the CSV file containing the user identities.

1. Create a CSV file with all the user fields in it.

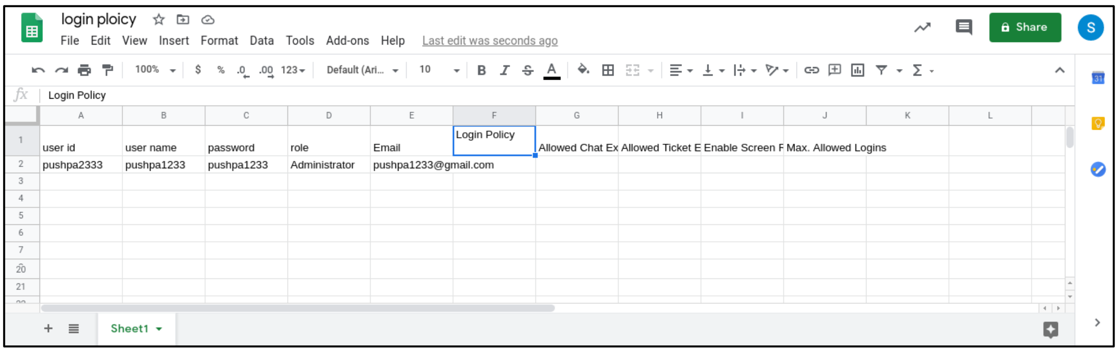


Figure: CSV File

2. Click "Bulk Upload" button to upload the CSV file.
3. A pop-up to select the CSV file is displayed. Select the CSV file from here and click "Upload" button.
4. Once the file is uploaded, a modal is displayed, which shows the count of the successfully uploaded user records. If any user record is duplicated or an entry with respect to any user is already present in the system, then the count of those failed records will also be shown in this modal.

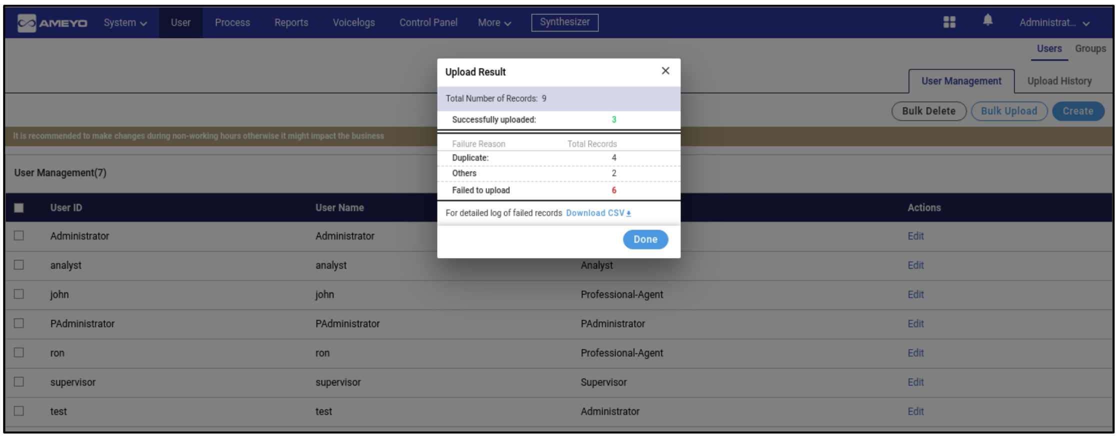


Figure: Modal shown for Bulk Upload of Users

5. After the upload status, a modal is displayed in which the administrator has to map the columns of the CSV file with the columns of the users field.

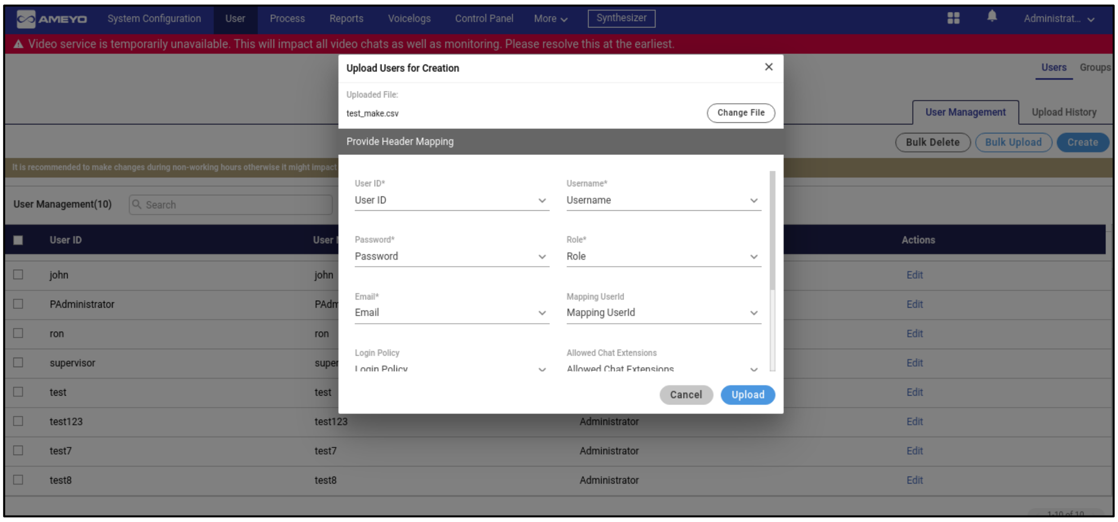


Figure: Mapping of User fields

6. After the user creation step, the administrator can view the upload history of the users from the upload history tab.

6.1.2 Upload History

Once the upload process is completed, the administrator can view the history and the status of the successfully uploaded users from "Upload history" tab. In this tab, all the upload histories are present with their errors, if any. The upload history tab shows the count of the total records uploaded using the CSV, count of failed records, and status of the file. It also shows the count of the remaining records that are left to be uploaded. Here the administrator also downloads the list of the failure records in the CSV file format. The "Exported Date and Last Exported" columns show the name and the time at which the Failed CSV record file has been downloaded.

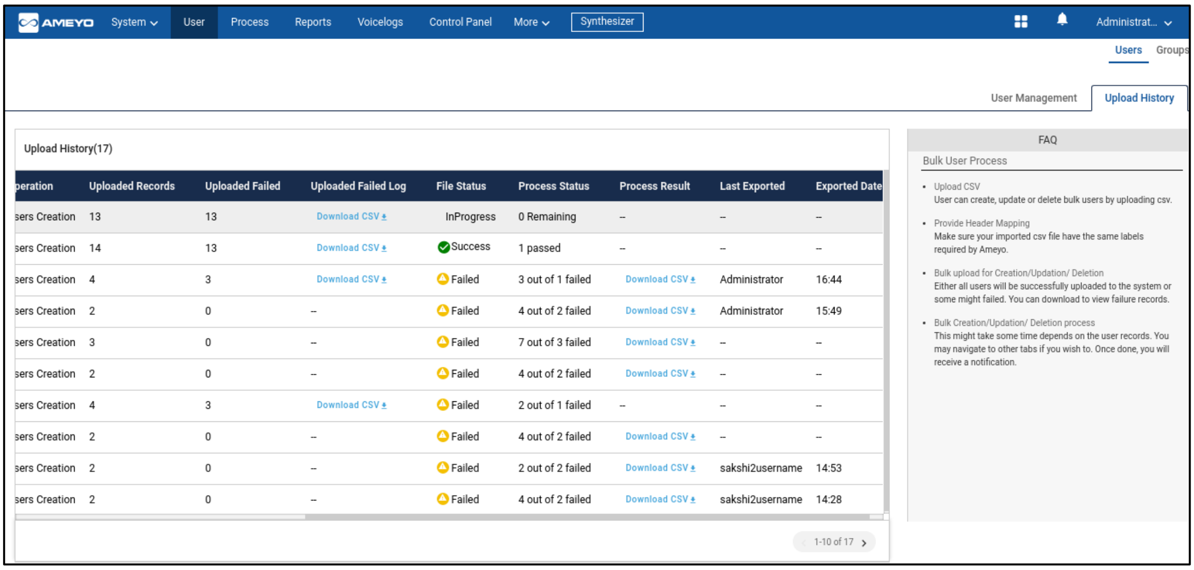


Figure: Upload History Tab

6.2 Group Management

The Administrator can create new user groups in the Ameyo system. The group management in Ameyo provides the feature to the Administrator to group the agents so that the "Group Manager" is able to manage and supervise them.

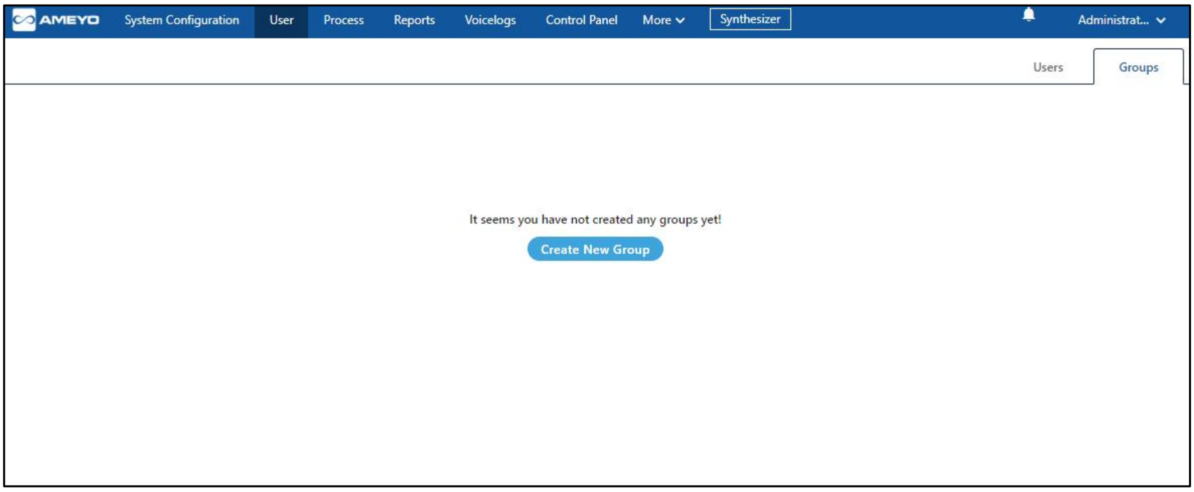


Figure: Group Management

By default, the screen does not have any groups and shows the above screen at the time of the first login.

6.2.1 Create New Group

Before creating any group manager, the administrator has to create a user with the user role "Group Manager".

Click "Create New Group" button present on the page. The following page is displayed.

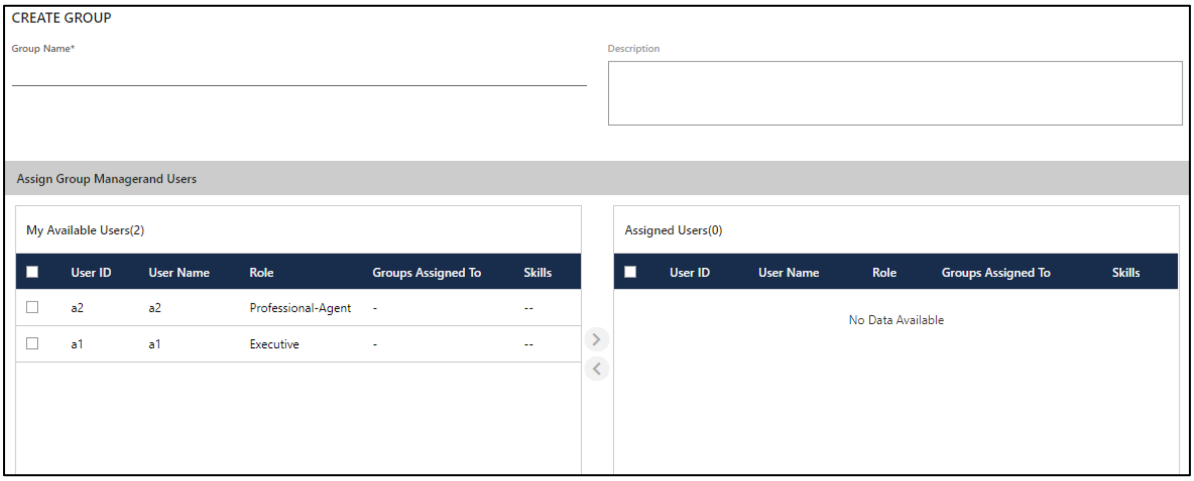


Figure: Create Group

Perform the following steps to create the group.

1. Provide the name of the group in the "Group Name" column.
2. Enter the description of the group, if any, in the "Description" textbox.
3. Select the agent from the "Available Users" column which you want to assign to that group and click  icon.

   Assign at least one group manager user from the list. However, you can assign more than one group manager from here.
4. After providing all the information, click "Create" button.

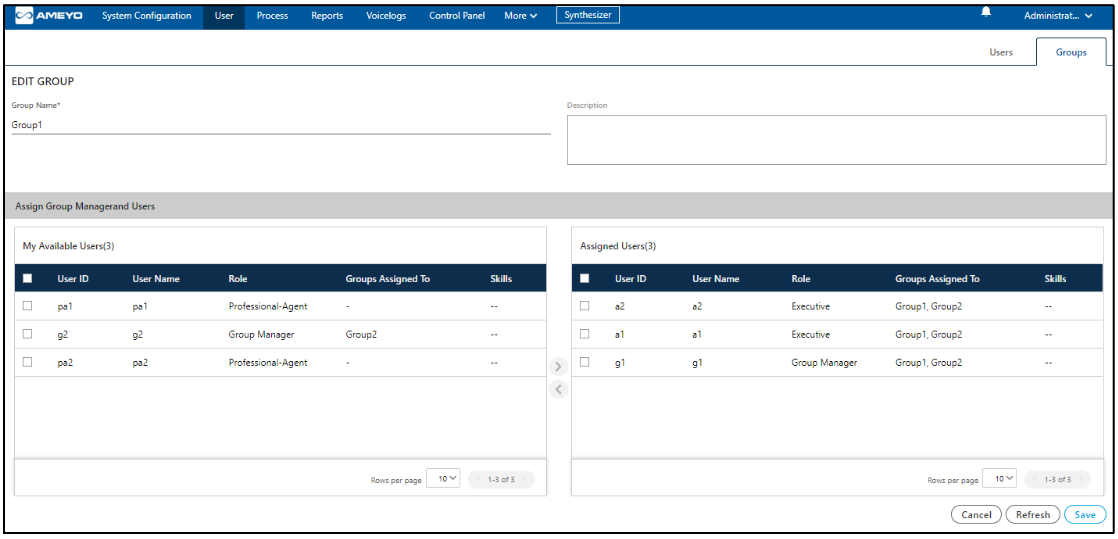


Figure: Sample Group

Click icon to unassign the users from the assigned list of the users.

The user assignment is atomic in nature, that is not transactional. If some users out of all selected users could not be assigned because of any reason such as configuration, then allowed users will be assigned except those are failed to be assigned. In the case of license restriction, the users of which license is not obtained will not be displayed in the section of available users.

6.2.2 Edit the Group

Perform the following steps to edit the group.

1. Select the group which you want to edit and click icon. The following page is opened.

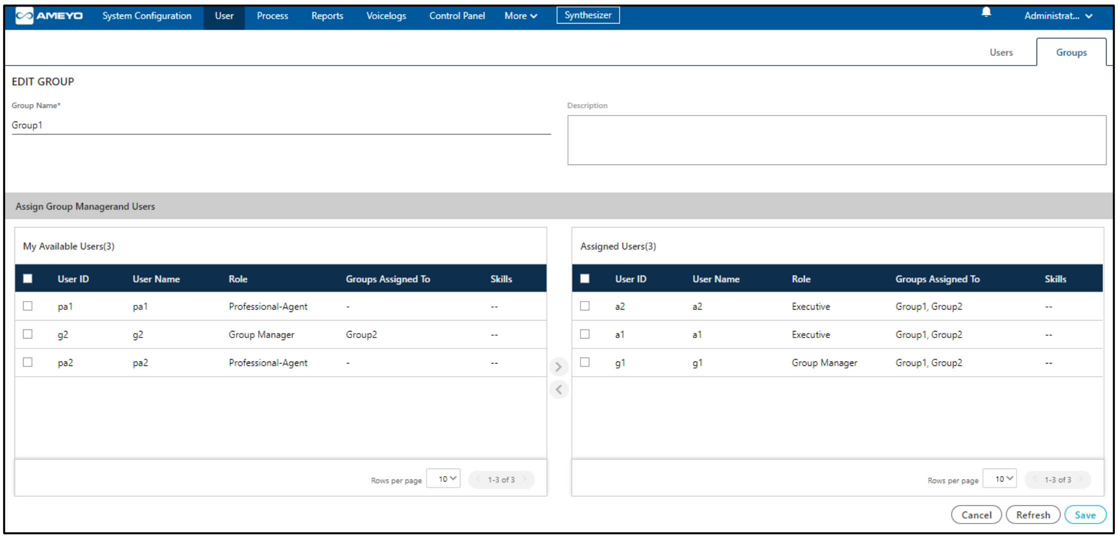


Figure: Edit the Group

2. Change the information which you want to change, and then, click "Save" button.

6.2.3 Delete Group

Select the group which you want to delete and click icon. A confirmation modal is displayed.

Figure: Delete Group

On the opened modal, click "Yes" button to delete the group, else click "No" button.

6.2.4 Assign Group Manager or Agents in Multiple Groups

A Group Manager or agent can be assigned to multiple groups. The Administrator can create multiple groups and assign a group manager in those groups. It means a Group Manager can monitor multiple groups having different or the same agents.

We recommend to not assign the same agents in multiple groups as it makes very difficult for the Group Manager to manage the groups and agents in such a case. However, if a few agents of one group have to be assigned to another group under the same Group Manager, then make sure that both the groups should have a few different agents. As it will help the Group Manager to distinguish between both groups.

Suppose a scenario where the Administrator is changing the group (say from "G2" to "G19") of a particular user (say agent1). After changing the group, the user (say agent1) has to logout and re-login to make the change effective and display it in the Administrator Console. However, the group was being displayed as changed to the Administrator (from "G2" to "G19") without the user's re-login.

Now, this issue has been fixed. The group of a user will be displayed as changed to the Administrator only when the user has logged out and re-login.

7. Process Configuration

7.1 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.

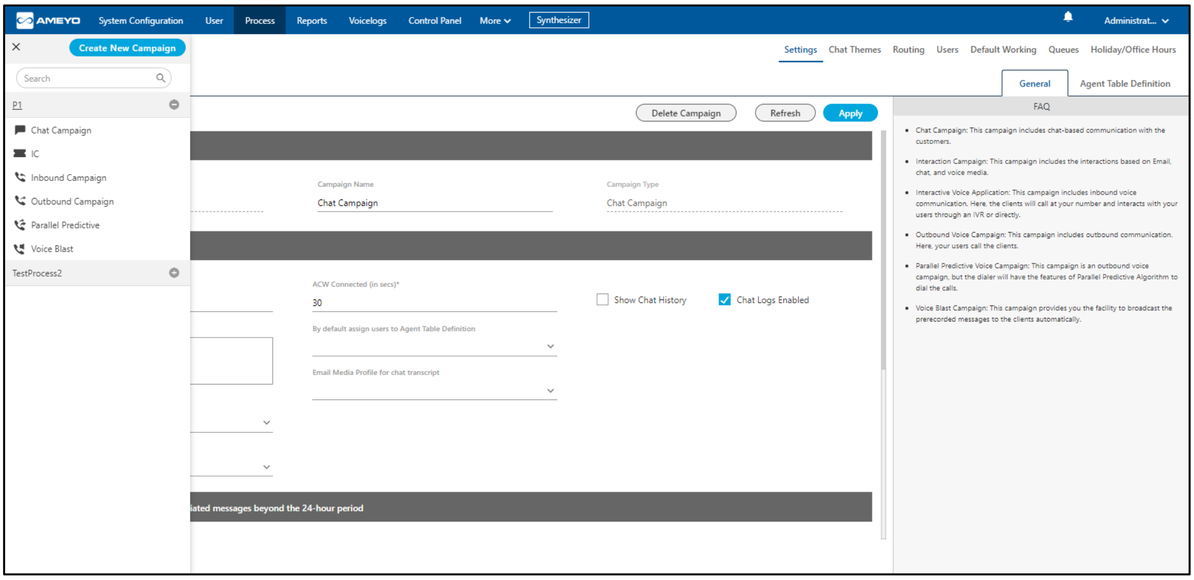


Figure: Process Tab

7.1.1 User Interface

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. **<u>Left Navigation Section</u>:** 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 in Campaign Settings.

7.1.2 Operations

Operations in "Process Tab" can be divided into the following 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...

   If no campaign is created, the Process Settings will not be visible. Therefore, create a campaign first and then access the Process Settings.

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**

7.2 Process Settings

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

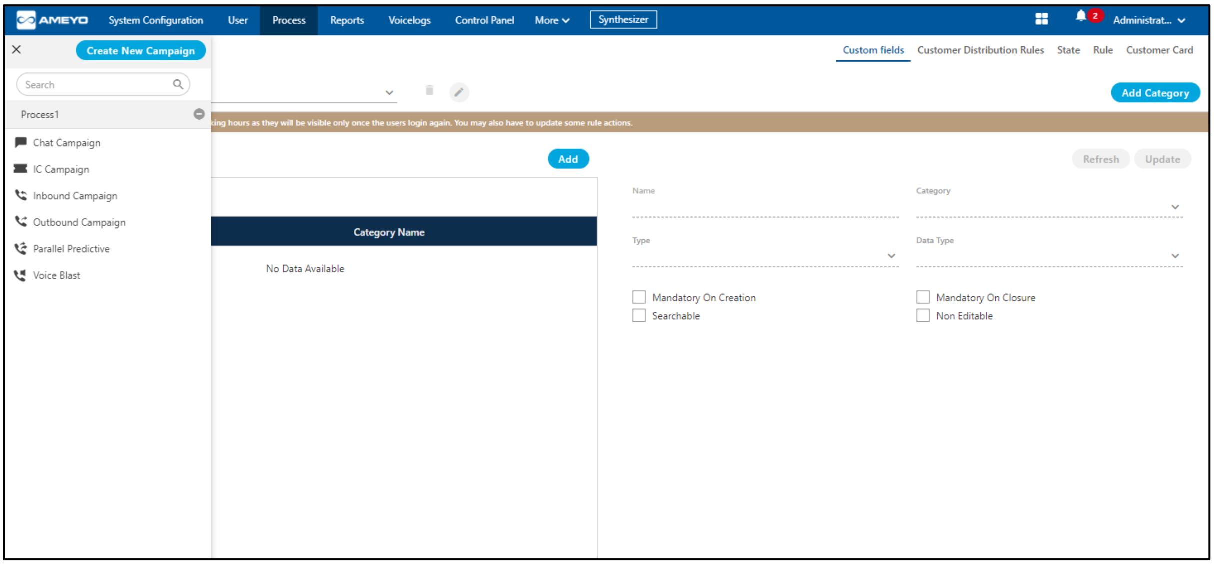


Figure: Process Settings

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

1. **Chat Theme**
2. **Custom Fields**
3. **Customer Distribution Rules**
4. **PACE State**
5. **PACE Rule**
6. **Customer Card**

7.2.1 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.

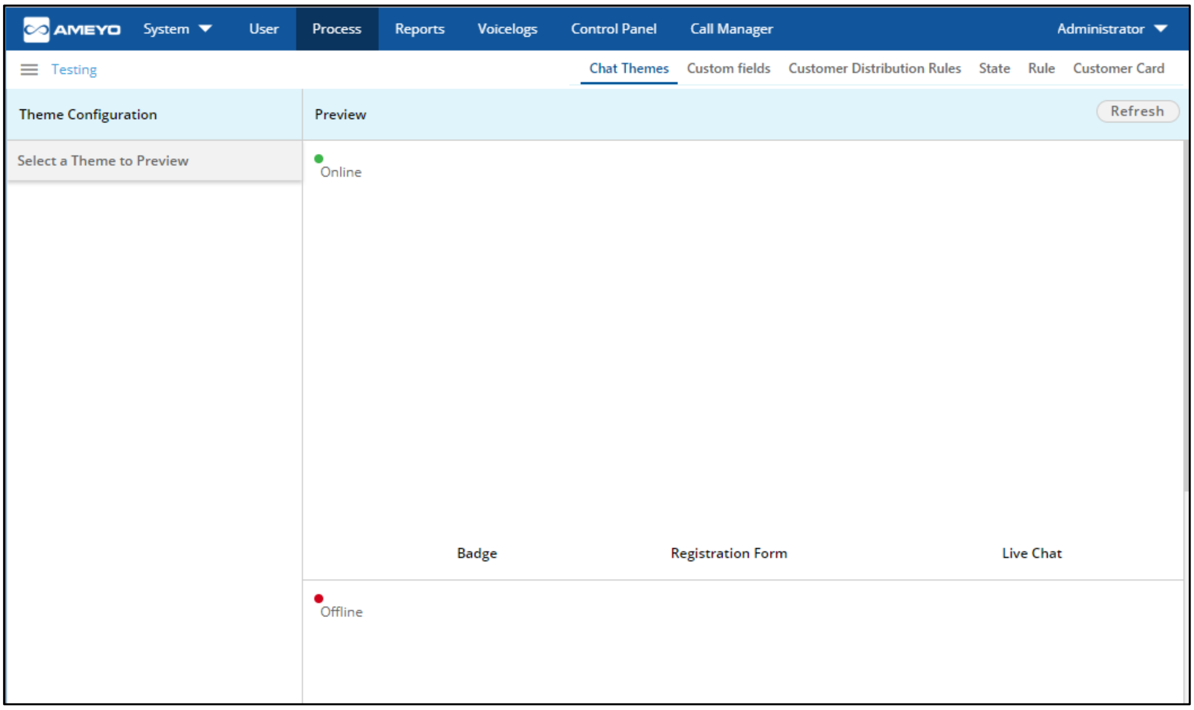


Figure: Chat Themes Tab

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

7.2.1.1 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 the 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 the 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 color 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>).

-
- 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 the header. It accepts the value in text format.

  - COLOR: It lets you modify the color of the 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 the 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 the button in the form. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
  - TEXT_COLOR: It lets you modify the color of the text in the 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 offline 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 the header in the chat screen. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
  - TEXT_COLOR: It lets you modify the color of the 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>).

7.2.1.2 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.

```
[root@testing ~]# psql -U postgres
psql (9.3.19)
Type "help" for help.

postgres=# \c ameyodb
You are now connected to database "ameyodb" as user "postgres".
ameyodb=# select * from user_session_history where logout_time IS NULL;
                session_id                 |    user_id    |   local_ip    | publi
pe   | client_version | browser_info | reason | archive_id
-------------------------------------------+---------------+---------------+------
-----+----------------+--------------+--------+------------
 d145-5bab2c95-ses-Administrator-vT87DuV2-0 | Administrator | 10.10.10.252 |
ient | 1.0.0          |              |        |          49
(1 row)

ameyodb=#
```

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

7.2.1.3 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

7.2.1.3.1 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.

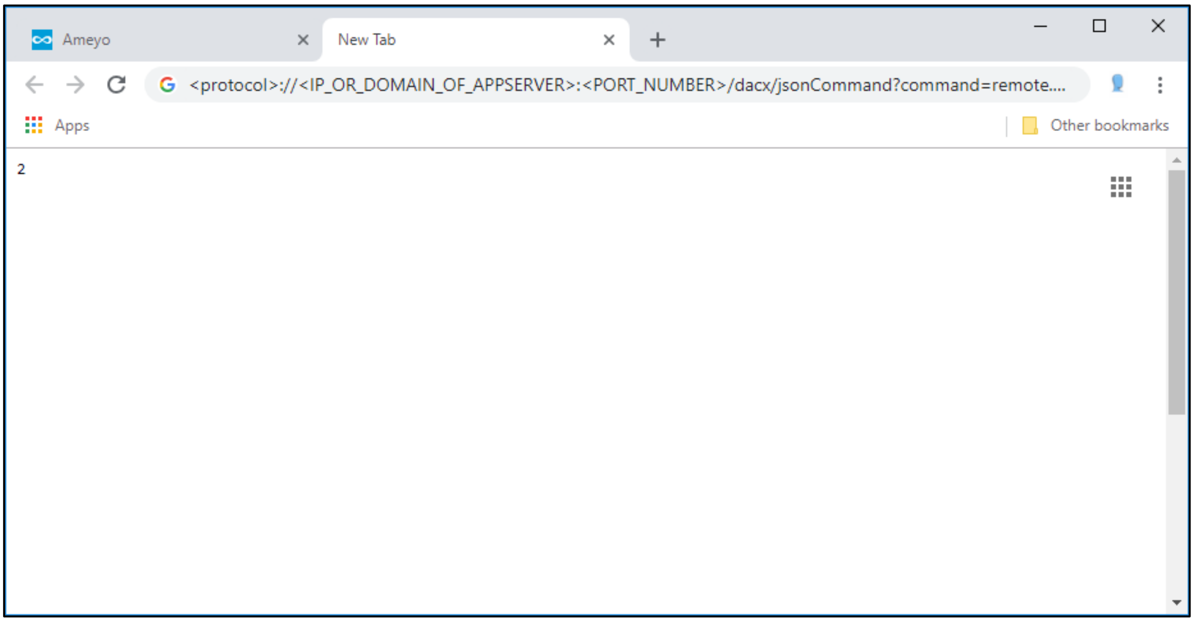


Figure: Add Theme API

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

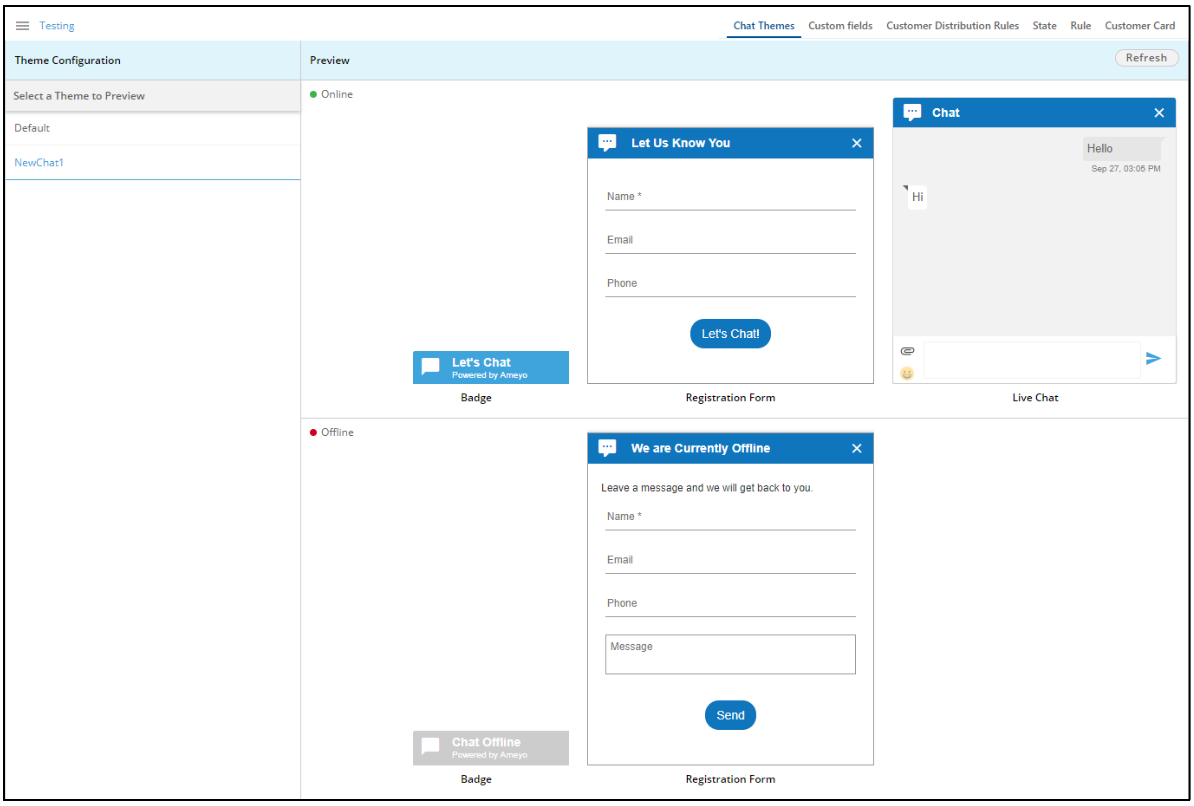


Figure: Added New Theme through API

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

7.2.1.3.2 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.

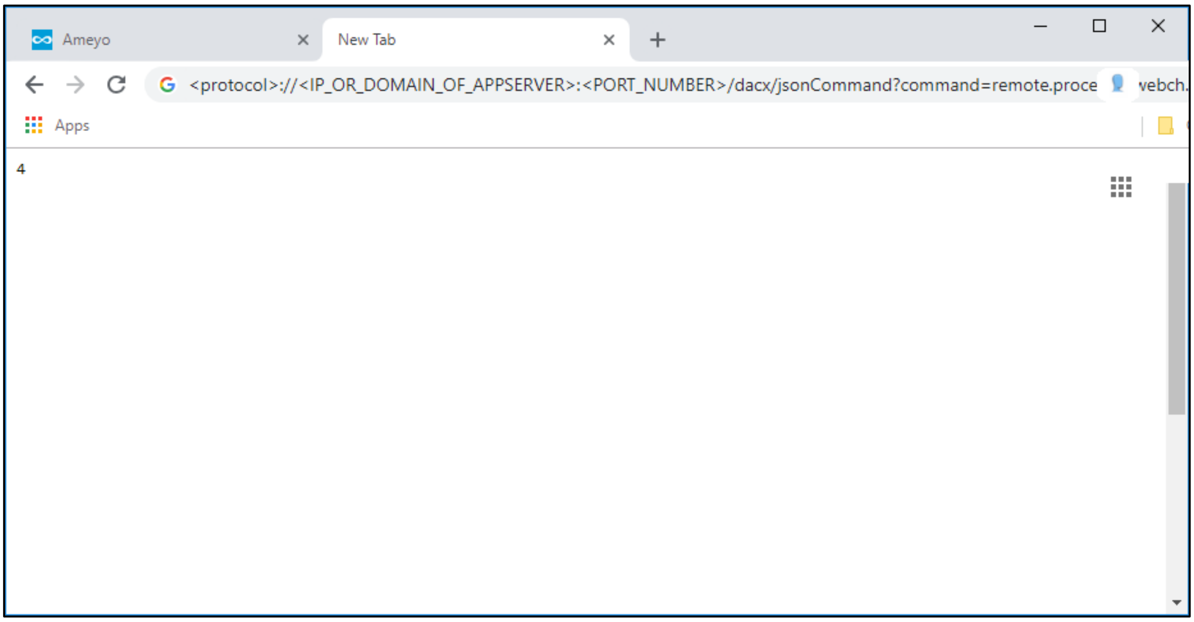


Figure: Add Property to Theme API

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".

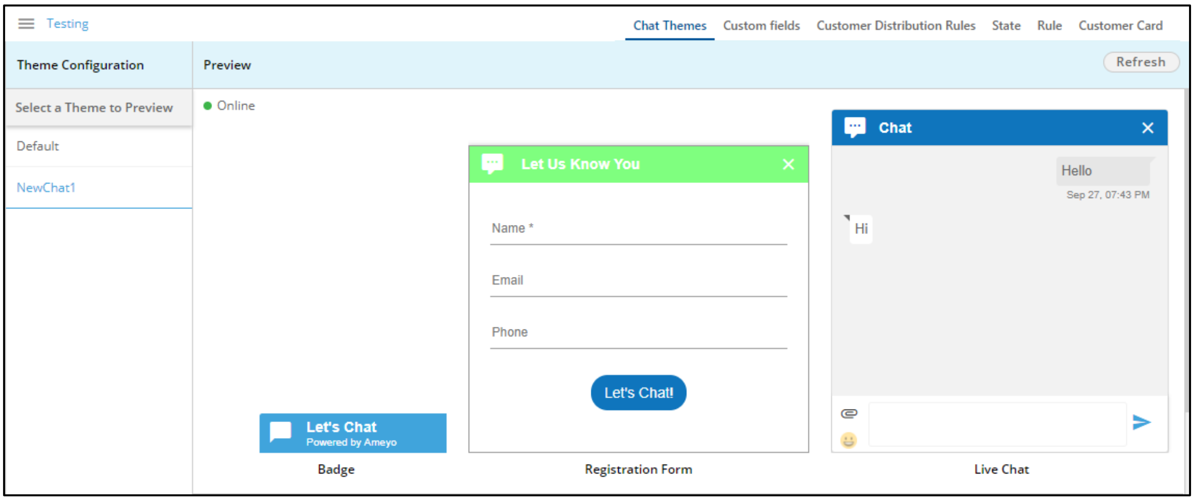


Figure: Modified Header of Registration Form

7.2.1.3.3 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

7.2.1.3.4 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.

7.2.1.3.5 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.

7.2.1.3.6 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.

7.2.1.3.7 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.

7.2.2 Custom Fields in Process Settings

7.2.2.1 Custom Fields Tab in Process Settings

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

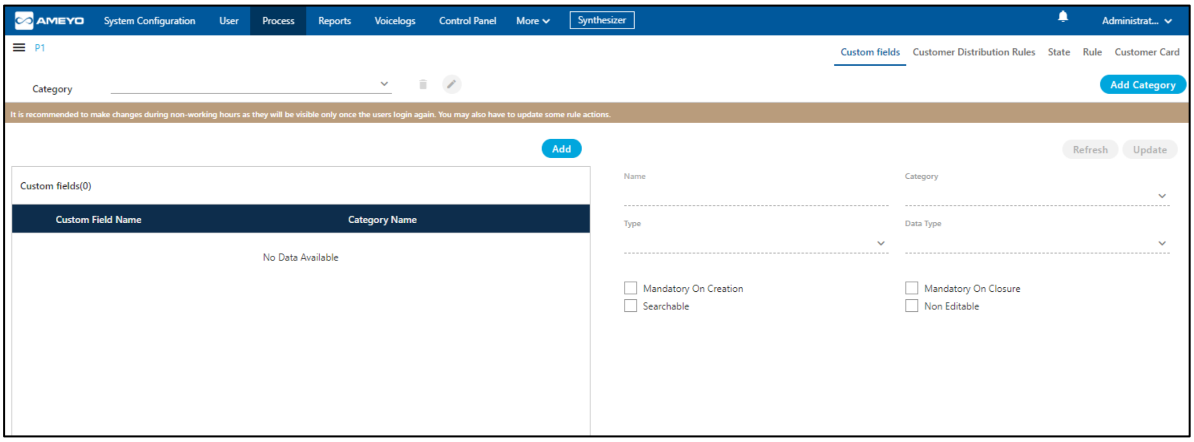


Figure: Custom Fields

7.2.2.1.1 Cautionary Line

A cautionary line is present at the top of the page which contains the following line

It is recommended to make changes during non-working hours as they will be visible only once the users login again. You may also have to update some rule actions.

The line is self-explanatory that after the creation of any custom field, the custom field will reflect at the agent's screen only when the agent needs to login again. That's why it is recommended to create custom fields at the non-working hour.

7.2.2.1.2 Default Category of Custom Fields

A default category of Custom Fields named "Default Category" will be created in the backend database while creating a Process. When the Administrator will try to create the Custom Fields without creating a Custom Category, then the Custom Fields will be assigned to "Default Category" by default. Hence, the Custom Fields assigned in "Default Category" will be displayed on the User Interface.

7.2.2.1.3 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".

7.2.2.1.4 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.

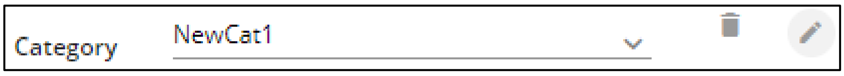


Figure: Category Drop-down menu

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.

7.2.2.1.5 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.

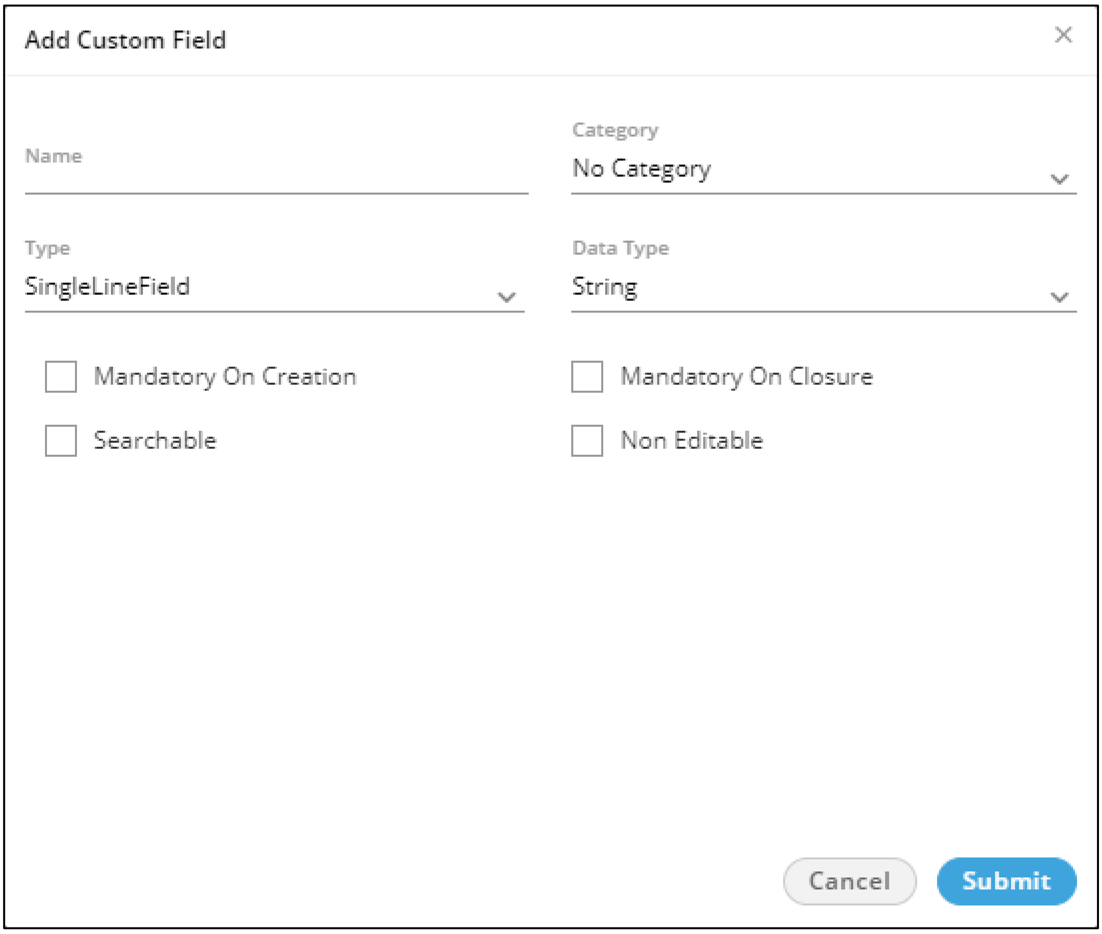


Figure: Pop-up to create a Custom Field

2. Provide a name for the custom field.
3. Select a category using the "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.

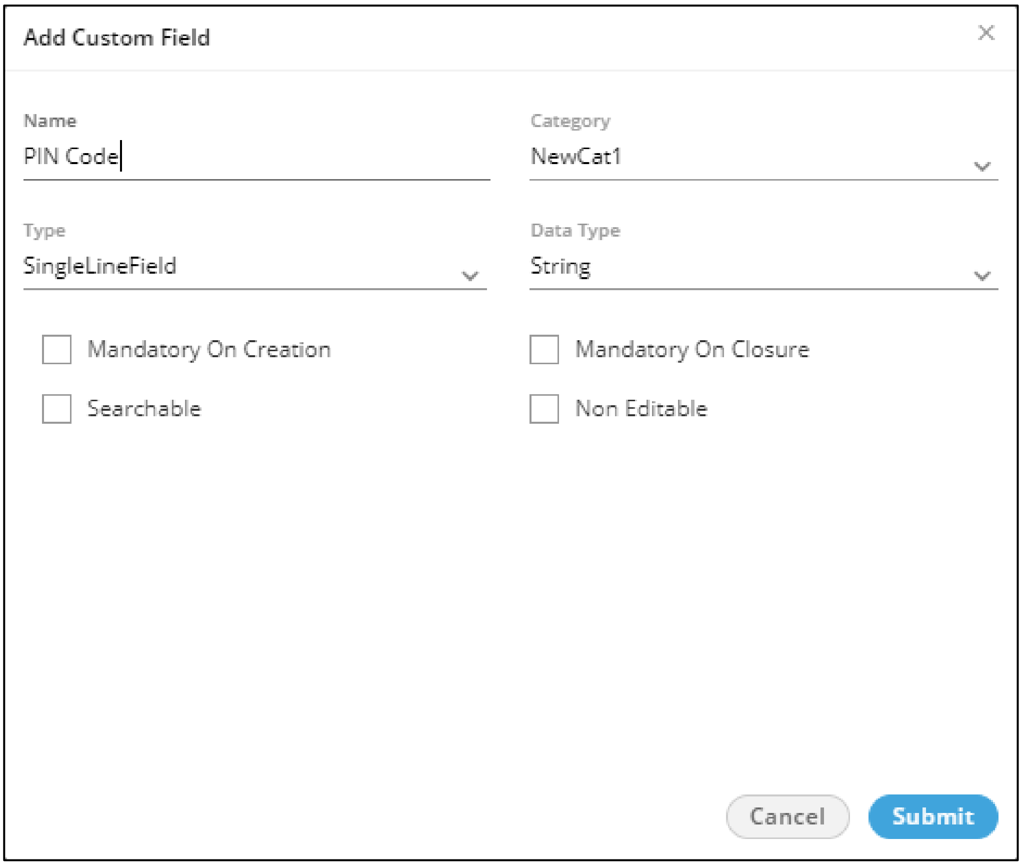


Figure: Single Line Text Field

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.

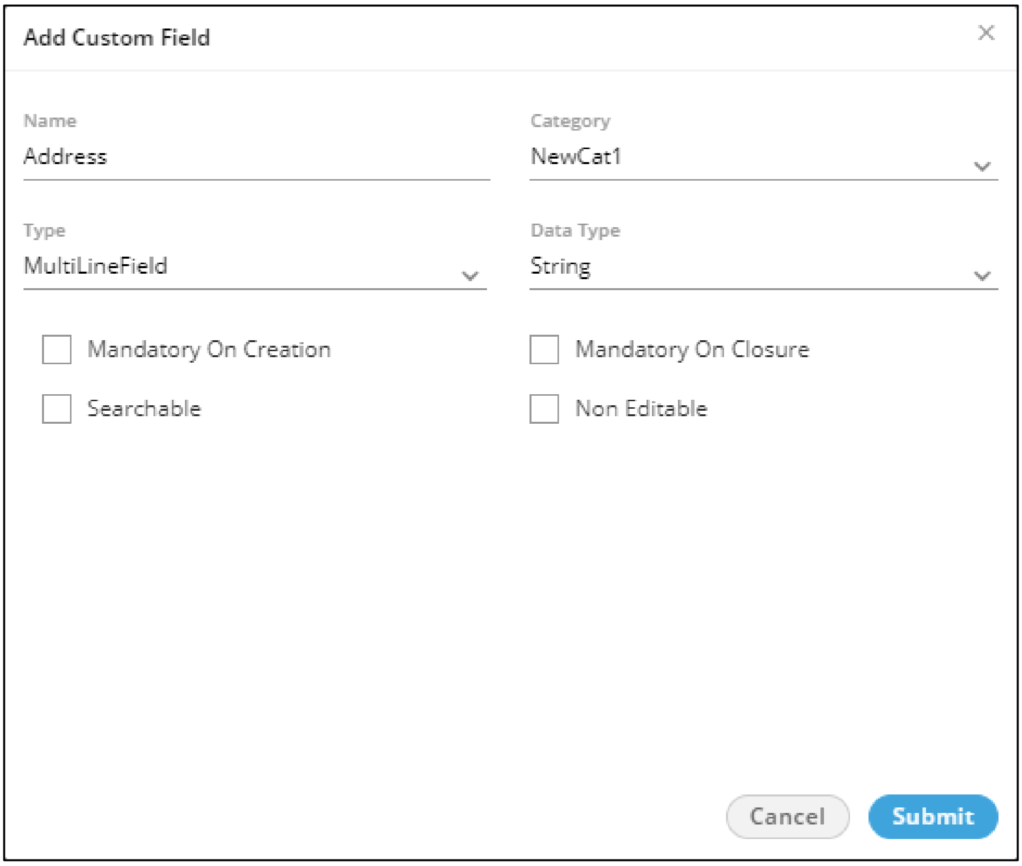


Figure: Multi Line Text Field

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 multiple checkboxes. It shows the "Possible Value" section in the pop-up.

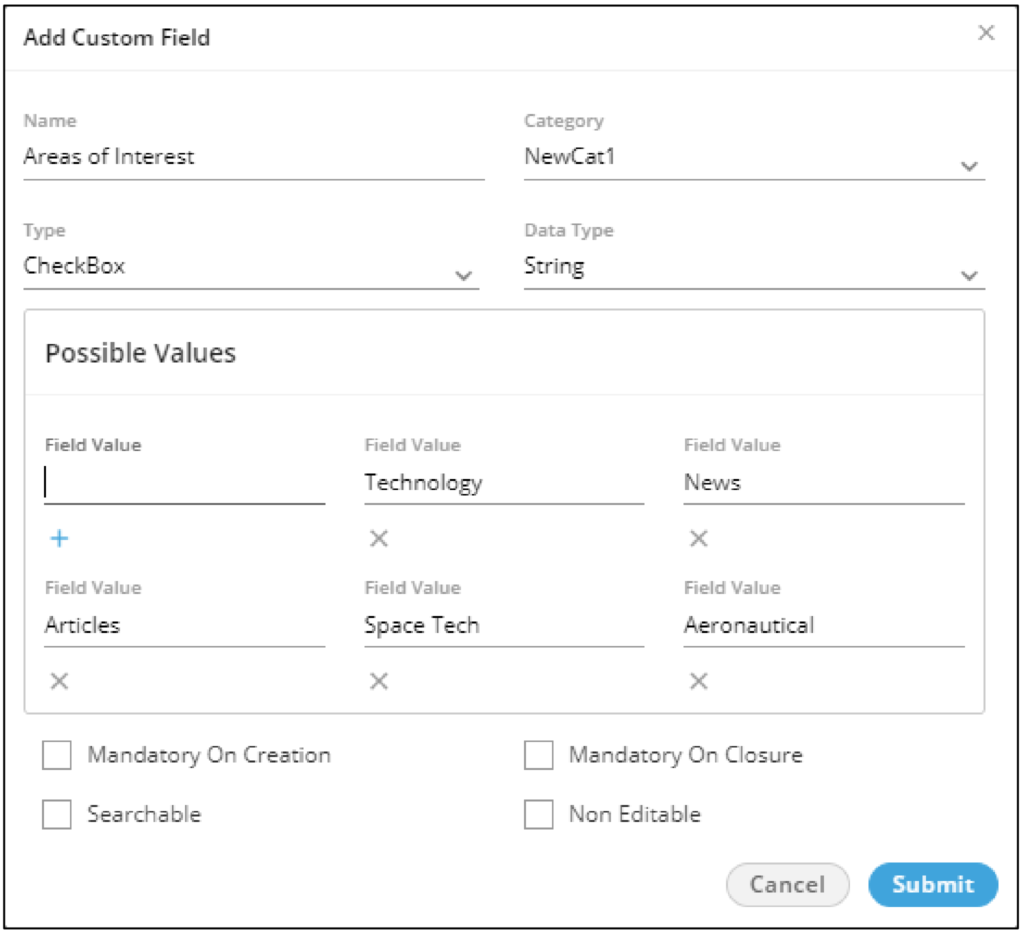


Figure: Checkboxes as Custom Fields

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 the "Possible Value" section in the pop-up.

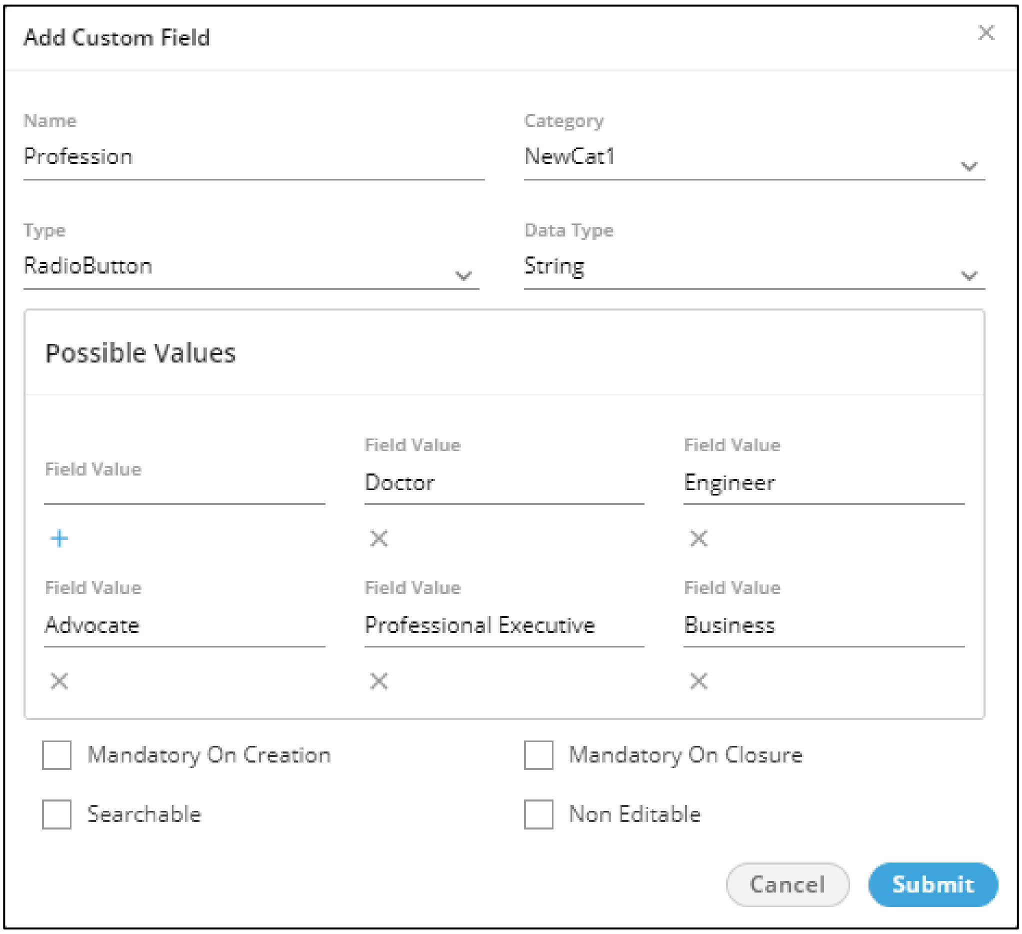


Figure: Checkboxes as Custom Fields

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 the "Possible Value" section in the pop-up.

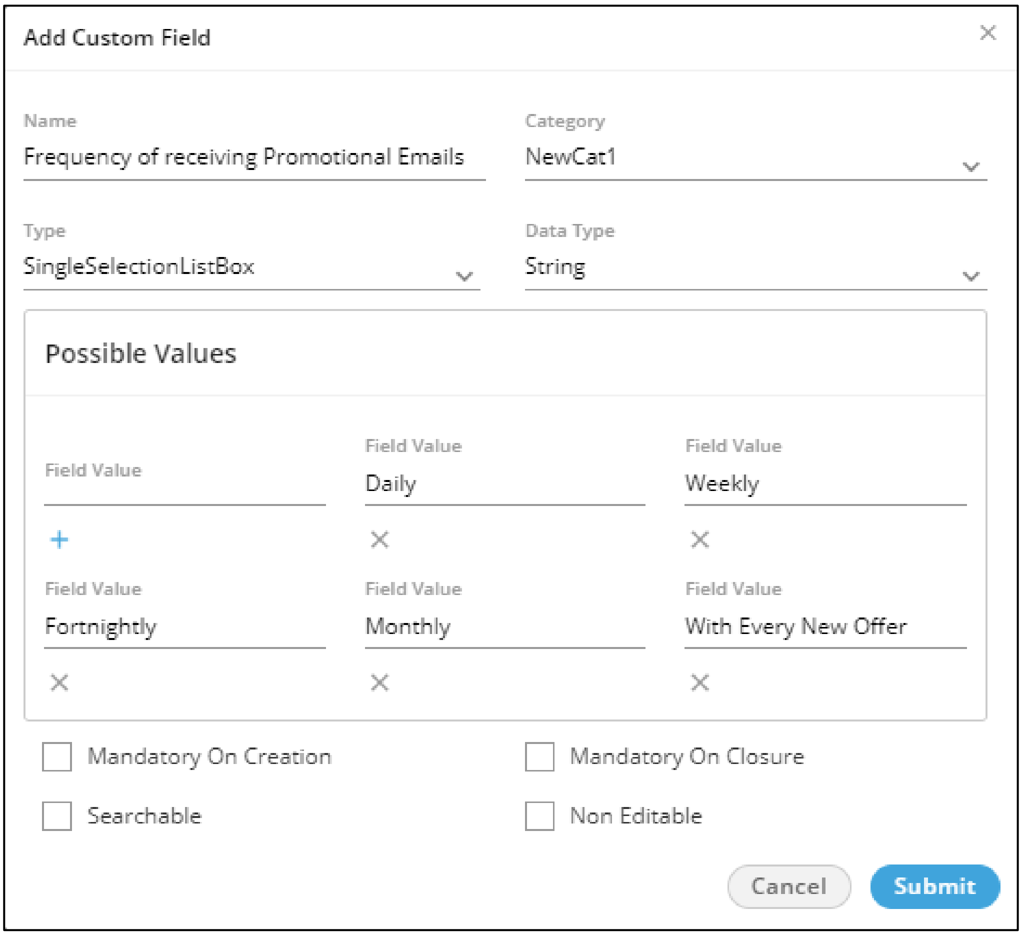


Figure: Single Selection List

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.

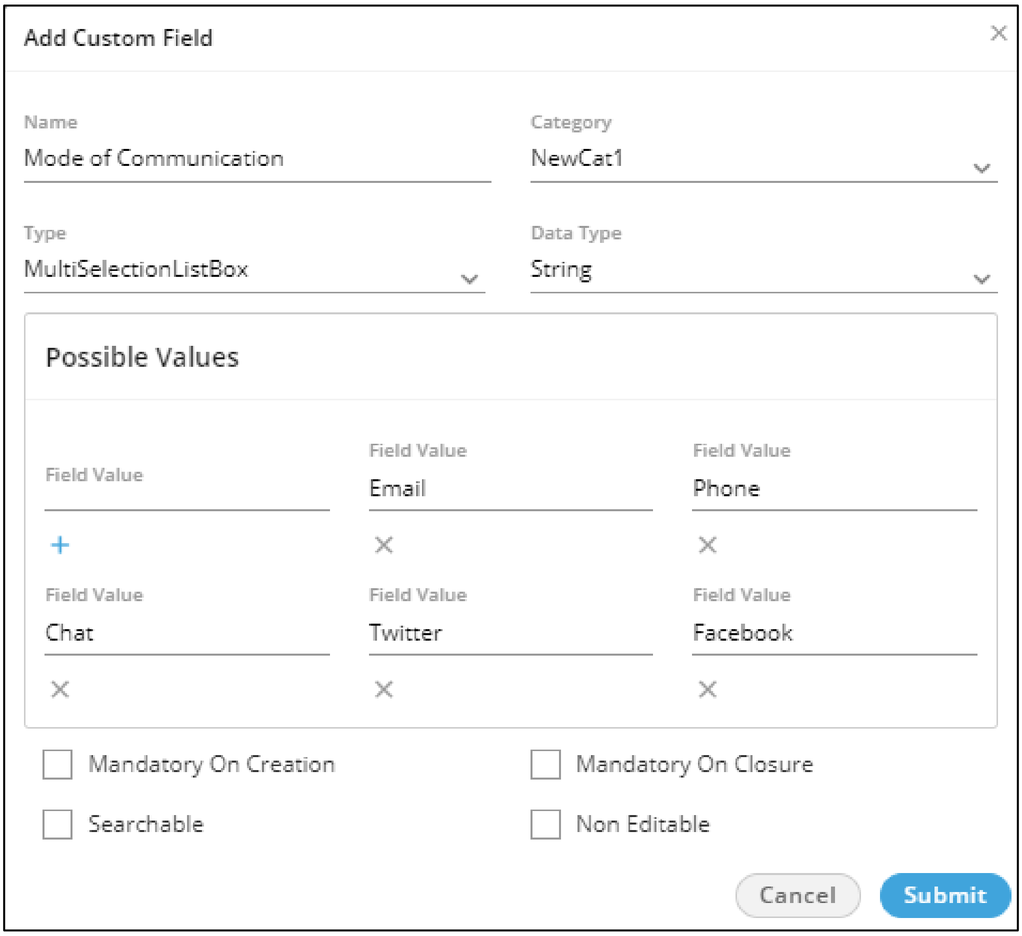


Figure: Multi-Selection List

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 multiple values.

Select any of the following data types for this field.

- String
- Integer
- Decimal

To delete a field value, click the "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.

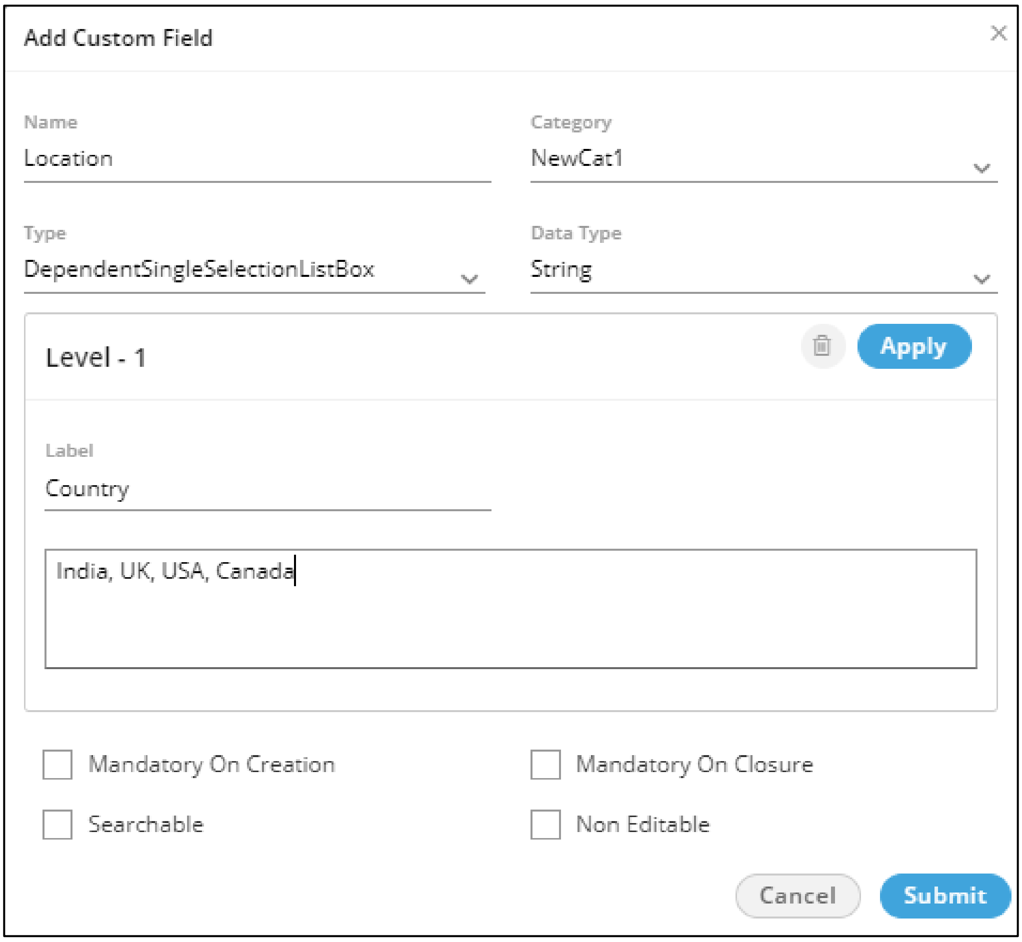


Figure: First Level of Dependent Single Selection List

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.

Scroll Bar Information: In case of multiple values, the scroll bar will be displayed in this 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 a second level list.

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

You can scroll down to enter the values for the next fields.

IX. Click "Apply" to save the list.

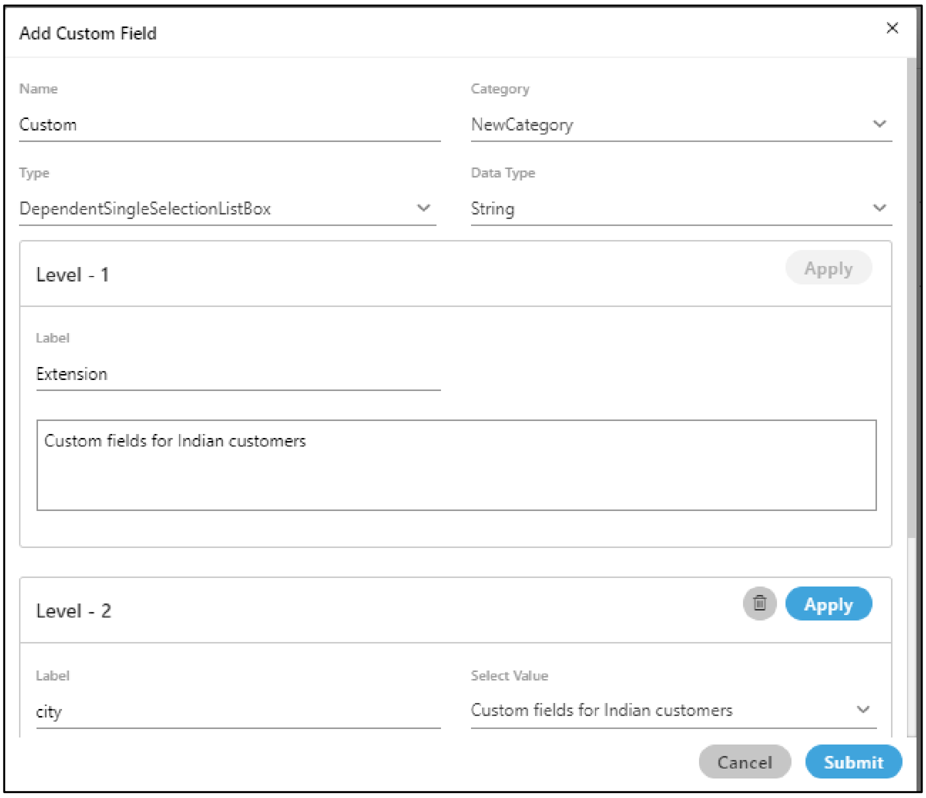


Figure: Multiple Levels of Dependent Single Selection List

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 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 the "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.

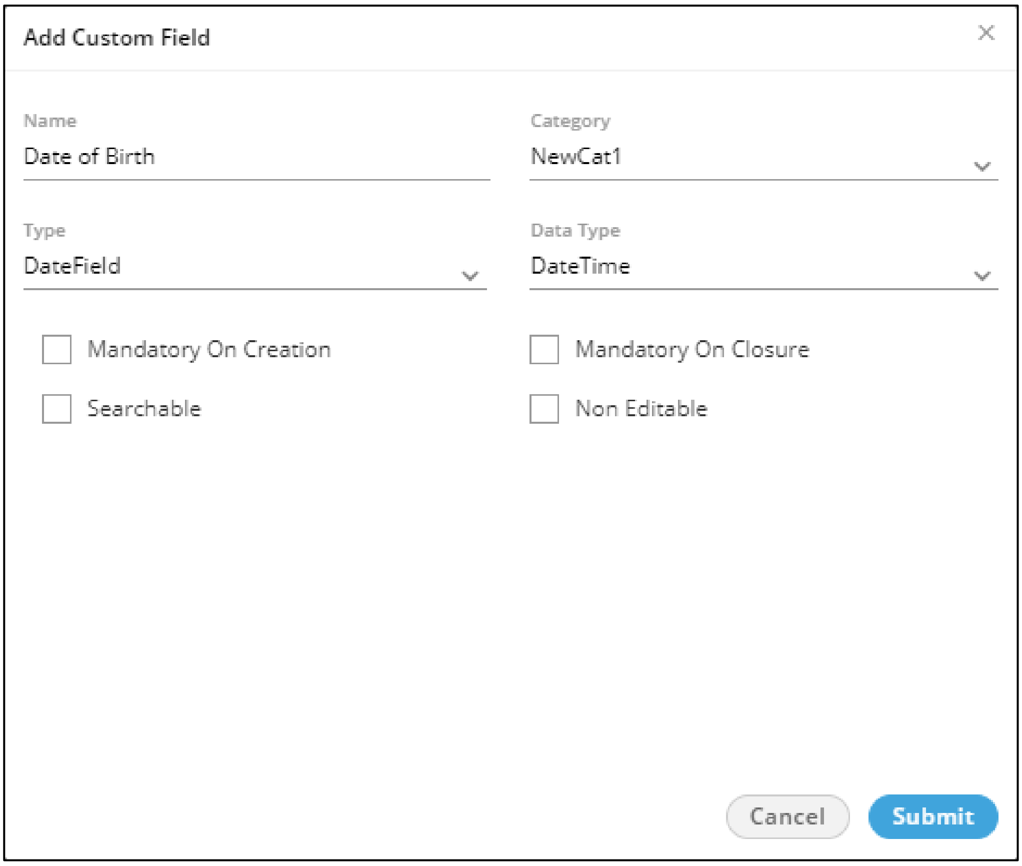


Figure: Custom Date Field

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

C. Regex: The Regex custom field is used to store the custom unique identifier for the tickets. Know more...

4. Select any of the following options either to make the custom field mandatory either while creating the 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 on the left side.

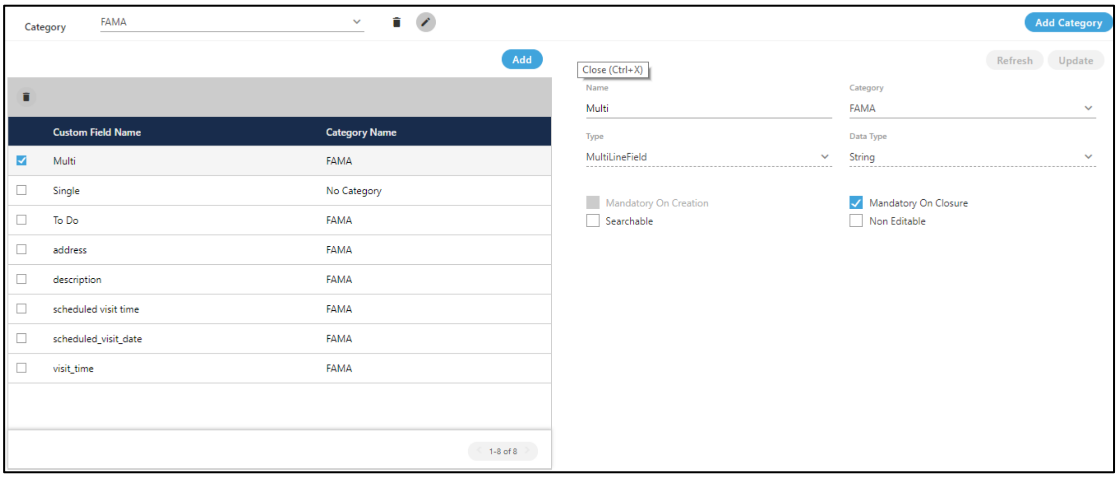


Figure: List of Custom Field

7.2.2.1.6 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 the creation or the 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.

   If any custom field is deleted or modified, then the agents are not required to logout and relogin to see the impact.

7.2.2.1.7 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 the "Delete" button to delete it. The following message is displayed.

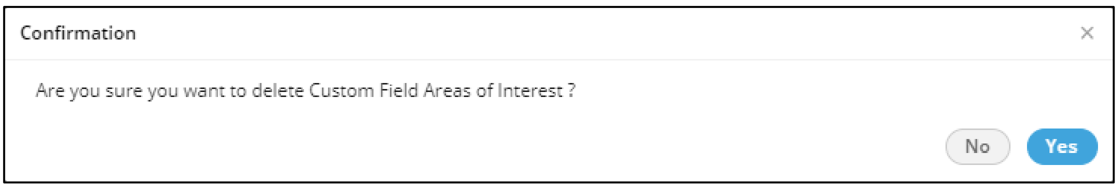


Figure: Deletion Confirmation Message

7.2.2.2 Regex Custom Fields in Process Settings

In Fusion, the customized fields in a ticket can be stored using the custom fields. This information can be used to refer to something or take action in another system through HTTP Actions. However, the captured information should be valid to give a reference or take action.

For example, a business captures the details of their orders in a CRM Application. It uses a unique identifier for each order, which can have predefined syntaxes such as ABC123456, ABC123457, and others. While talking to a consumer, an agent captures the order ID in the custom field that can be passed to another system. Before that, the business needs a system to validate the order ID.

To meet this requirement, Ameyo Application Server now features a new Custom Field Type named "Regex". It allows the Administrator to create a Custom Field and define the validation. It accepts "String" type values as per the validation implemented during their creation.

Go to "Process" Tab → Settings of a Process → "Custom Field" to create and manage the custom fields.

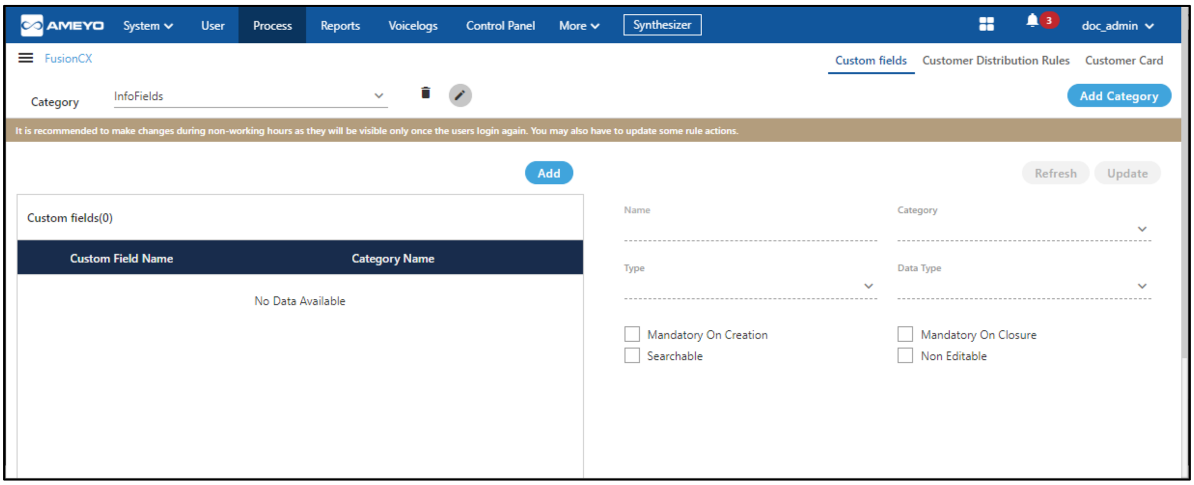


Figure: Custom Field Tab

The changes made in the Custom Fields will be visible to the agents only when they log out and re-login. Therefore, it is recommended to make these changes in the non-working hour so that the agent will notice these changes when they login to their working hours. On the top, the following message is displayed.

It is recommended to make changes during non-working hours as they will be visible only once the users login again. You may also have to update some rule actions.

Perform the following steps to create a Regex type Custom Field in an already existing Custom Field Category.

1. Click "Add" button to add a new Custom Field. It shows the following modal.

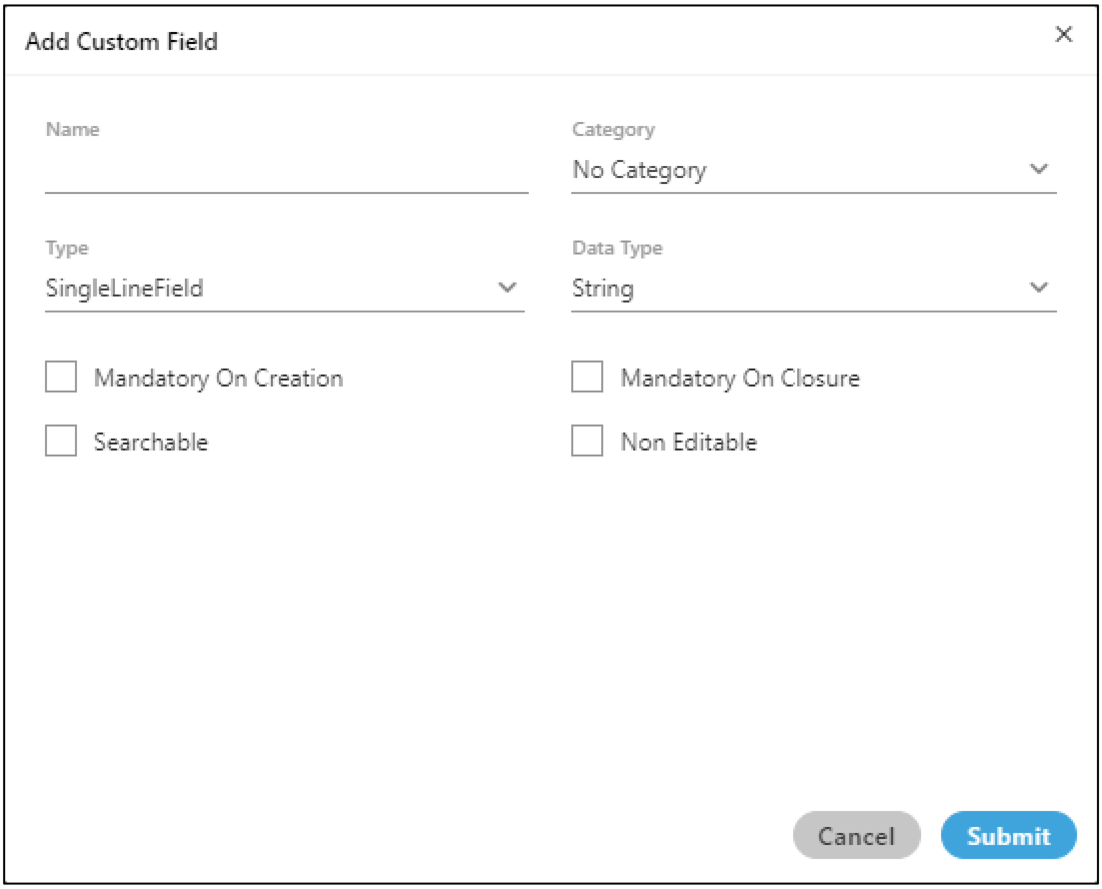


Figure: New Custom Field

2. Provide a name for the new custom field.
3. Select the category of the Custom Field.

4. Click "Type" drop-down menu to select the custom field type.

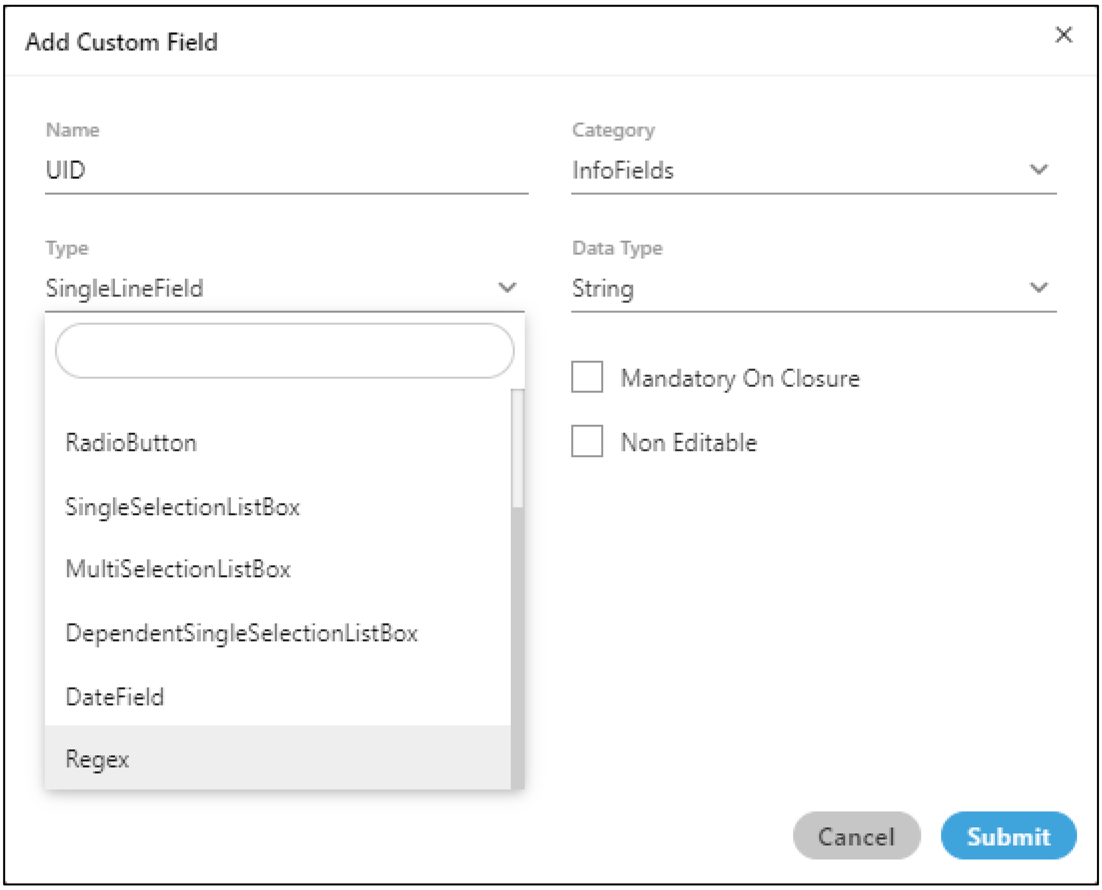


Figure: Types of Custom Field

5. Select "Regex" as a type of the custom field.
6. The default data type of "Regex" is "String".
7. The next step is to provide the Regular Expression. To create a Regular Expression, the Ameyo User can provide a range of letters or numbers, such as the following examples.
   - **[a-z]:** It denotes a single small-case letter between "a" to "z".
   - **[A-Z]:** It denotes a single capital-case letter between "A" to "Z".
   - **[1-9]:** It denotes a single number between "1" to "9."
   - **[a-c]:** It denotes a single small-case letter between "a" to "c".
   - **[D-F]:** It denotes a single small-case letter between "D" to "F".

Instead of the range, the Ameyo User can provide a constant value such as "ABC", "FII", "2020", or "2021". The following table illustrates some sample Regular Expressions.

Sample Regular Expression	Sample Valid Value 1	Sample Valid Value 2
[A-Z][A-Z][A-Z][1-9][1-9][1-9]	ABC123	XYZ345
IFC[a-d][n-p][1-9][1-9][1-9]	IFCan123	IFCep789

8. After entering the Regular Expression, the Ameyo User can provide a sample value in "Test a String" text field and click icon to test whether the provided test value is valid or not.

- **Example 1:** The test value in the following case is valid as per the provided Regular Expression.

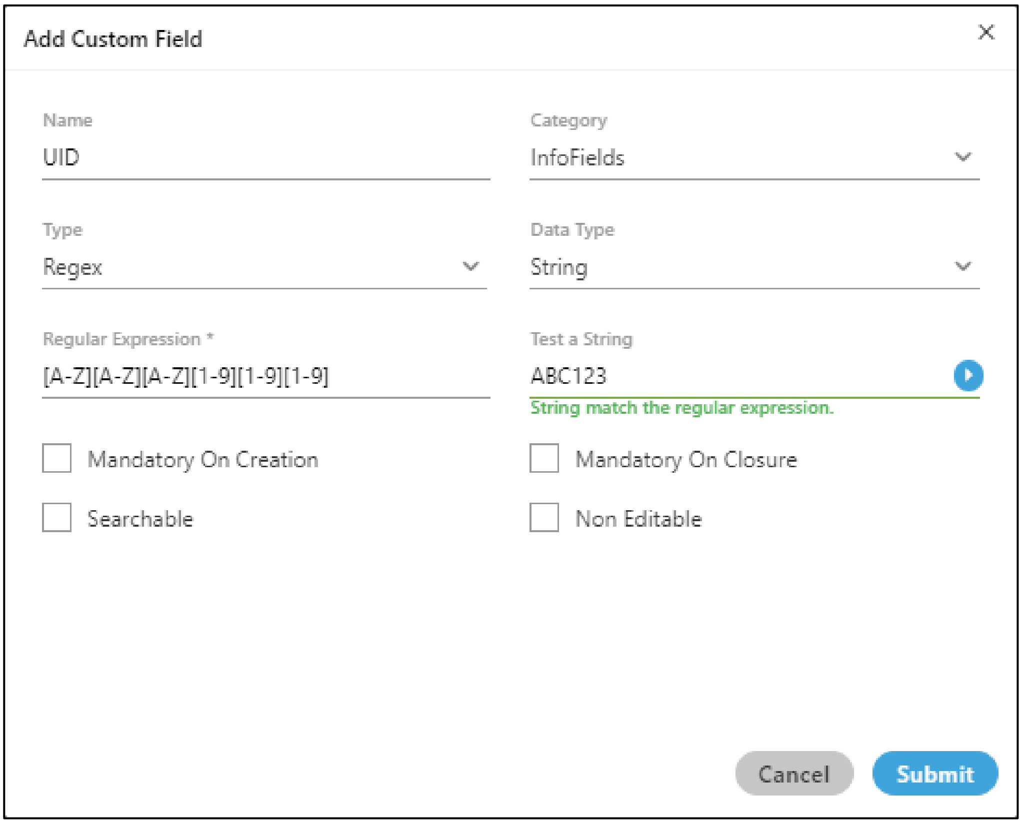


Figure: Successful Validation of the test value

- **Example 2:** The test value in the following case is invalid as per the provided Regular Expression.

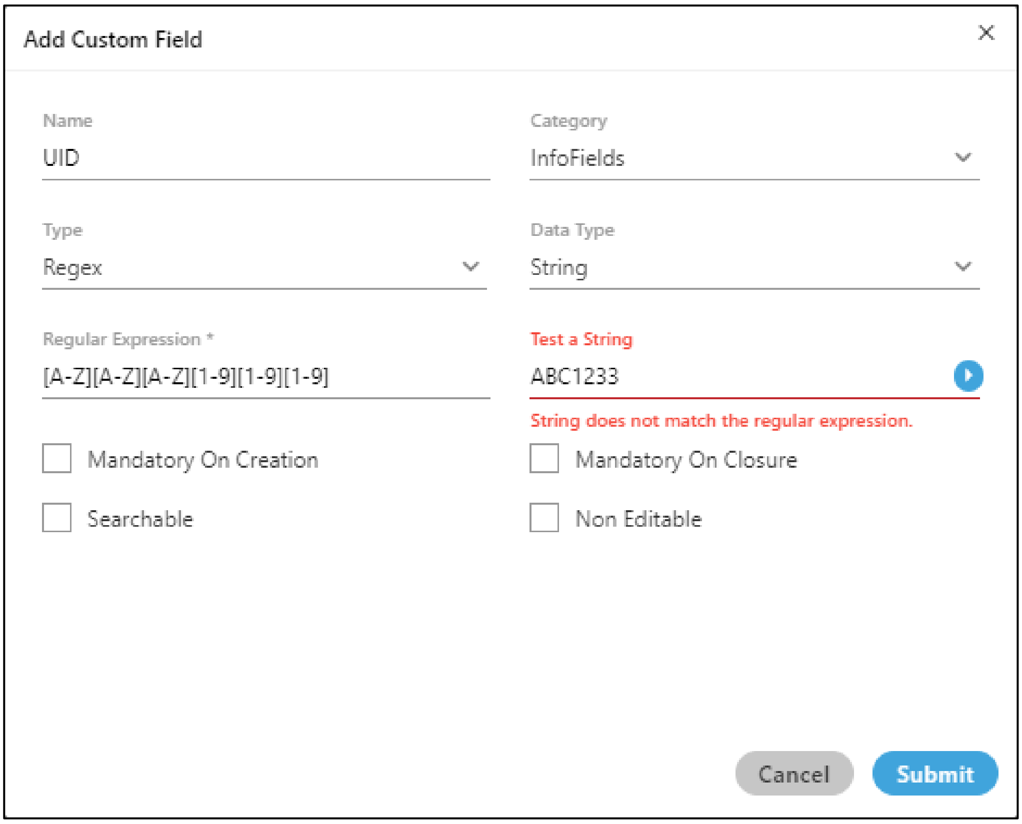


Figure: Failed Validation of the test value

- **Example 2:** The test value in the following case is invalid as per the provided Regular Expression.

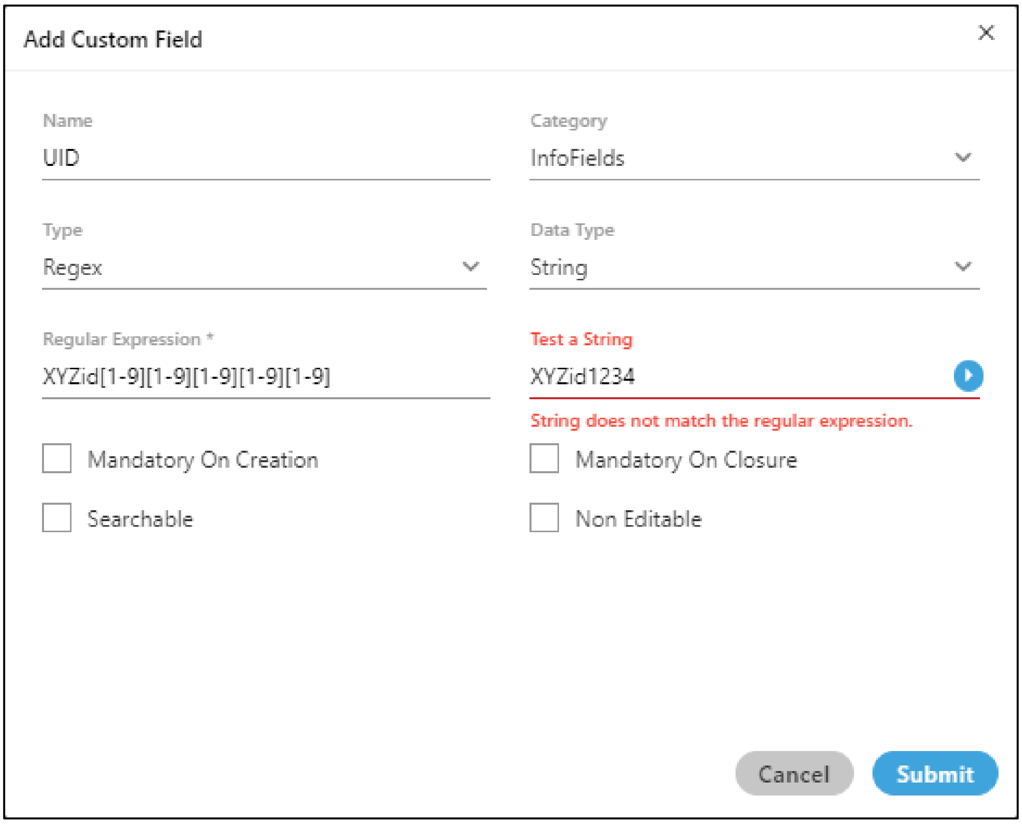


Figure: Failed Validation of the test value

9. Select other options as per requirement. Refer to this user manual link for details.
10. Click "Submit" to create a Regex type Custom Field.

If the agent tries to enter the wrong Regex, then the agent will receive an inline error for the Regex field if the provided value does not match the defined pattern.

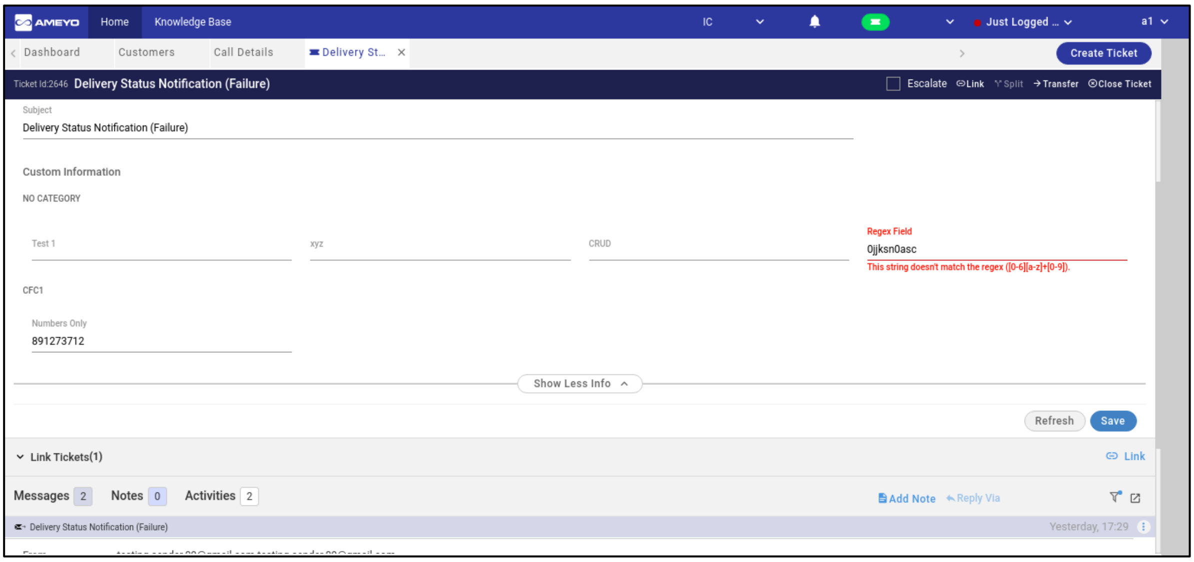


Figure: Inline Error Message for Regex Field on Agent Console

The validation for Regex type Custom Field will be available in App Framework, Rule Engine, and API also.

If a rule is created for a Regex field already, but that Regex Field is modified, then that rule may not work.

7.2.3 Customer Distribution Rules

The administrator can upload the customer data at process level.

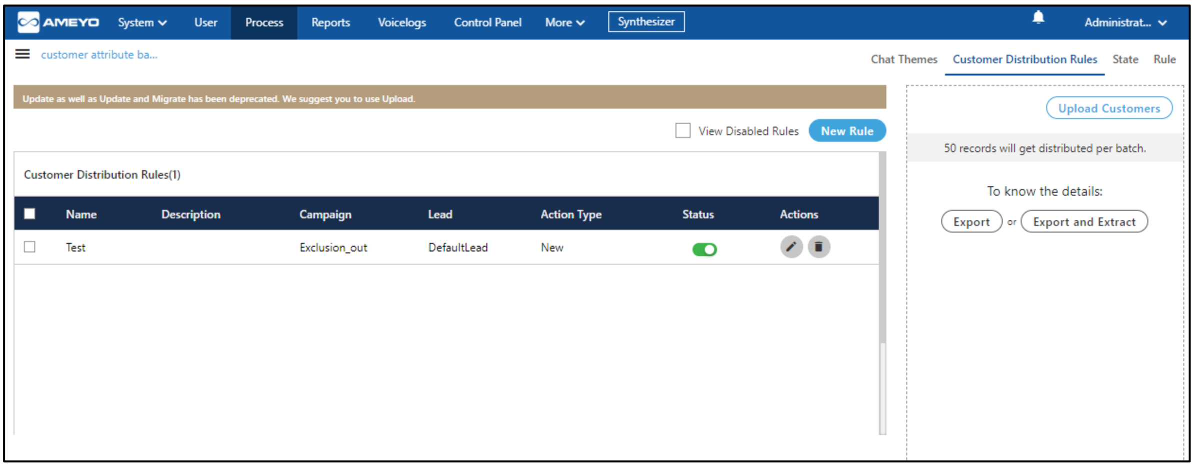


Figure: "Customer Distribution Rules" Tab in Process Settings

Following are the features of the customer data upload at process level.

Step	Process Flow
Definition	Now, the Customer Data will now be uploaded and distributed at the process-level its instead of the system-level.
Ameyo Refresh Table and Customer Prospect Table	Each Process will have its unique and separate Ameyo Refresh Table, which will be "ameyo_refresh_table_<process_id>" (Here, process_id is the ID of the Process.) Also, each Process will have its unique and separate Customer Prospect table, which as "customer_prosect_<process_id>" (Here, process_id is the ID of the process). After upgrading the build to Ameyo 4.7, the Default Ameyo Refresh Table and t Customer Prospect Tables for every process will be created. If there are 5 process Ameyo Refresh Tables and 5 Customer Prospect Tables will be created as per mentioned naming conventions.
Customer Data Upload	Customer Data sill will be captured from different sources such as Staging Database A API, files placed at FTP, or by uploading the data manually through CSV file. However, th configuration have to be done to instruct the Ameyo System that which data should b in which "ameyo_refresh_table_<process_id>" table. Please refer to the following do know more about the same.
Transferring Data from Ameyo Refresh Table to Customer	From "ameyo_refresh_table_<process_id>" table of a process, the data will be transfe Customer Prospect table, that is "customer_prospect_<process_id>", of that process.

Step	Process Flow
Prospect Table	
Mapping the Columns	The user still have to map the columns of "ameyo_refresh_table_<prospect>" table o with the columns of "customer_prospect_<process_id>" of the same p "csutomer_prospect_column_mapping" table. However, now the user have to specif the Data Table of that Process of which Ameyo Refresh Table and Customer Prospect to be matched. Please refer to the following document to know more about the same. **Document on Ameyo Pre** https://sites.google.com/a/ameyo.com/engineering/Home/certificationknowledgebas feed-and-data-allocation-testing
Creating the Rules	"Customer Segregation" Rule tab from "System" → "System Configuration" → "Rule E been removed. A new tab "Customer Distribution Rules" has been added in "Process A new "Customer Distribution Rules" tab will be created for all existing and new proce Ameyo System. Now, the Administrator have to create the customer distribution rules at the Process- the data available in "customer_prospect_<process_id> of a Process.
Applicability of the Rules on Customer Data	The created Rules will be applied in runtime, that is, as soon "customer_prospect_<process_id>" table has some Customer Data, the rules will be a moving the matched data from "customer_prospect_<process_id>" table to the Table of that Process. After applying the rule, the data will be moved to the Data Table Defin process and will be deleted from "customer_prospect_<process_id>" table.
Action if no data is matched for	If any Customer Data does not match any "Customer Distribution" Rule, then it will r in the "customer_prospect_<process_id>" table and will not be used in any opera Ameyo System. The user can use the options on User Interface such as "Export" or "

Step	Process Flow
the applied rules	Extract" to download the data from the Customer Prospect Table of a process. After do the data, the user can access it and analyze what new rules can be created in Distribution Rules" tab to use this data.
Summary	In nutshell, the customer data is now uploaded and managed at the Process level. Ea has its unique "ameyo_refresh_table_<process_id>" table "customer_prospect_<process_id>" table. In addition to transferring the data to these t the linked sources, the user can also upload the data to these tables. The rules will also and applied at the Process-level. The user can also download the data from Custome table of any process.

The complete page is divided into two following sections.

1. **Right Section:** The right section allows the Administrator to upload the customers through CSV, export the customer data to CSV, and do both export and remove the customer data from the system. It contains the following options.

   - **Upload Customers:** Click this button to upload the customers list from a CSV file to the Ameyo System. We recommend to follow this naming convention to name the name of CSV files to be uploaded: **"<Process_Name>_<TimeStampofExport>.csv"**. The name of Column Headers in the CSV file should be same as that of Table Definition Fields of the selected process. If the name of Column Headers of CSV file are not different from the Table Definition Fields, then we recommend using "Provide Header Mapping" option while uploading the CSV.

     Perform the following steps to upload the Customer Data through CSV file.

A. Click "Upload Customers" button. It shows the following pop-up.

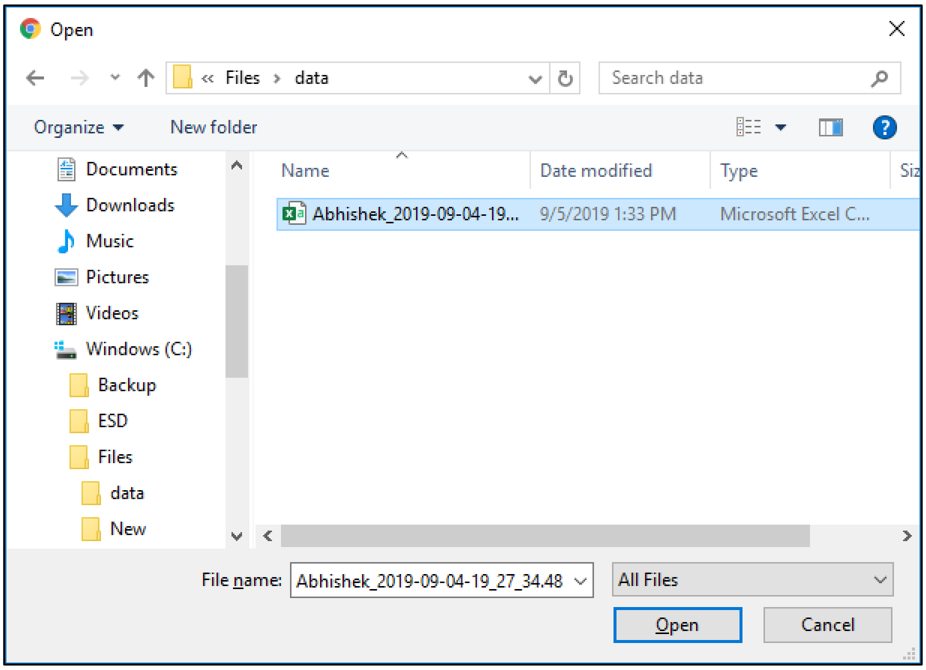


Figure: Open File dialog box

B. Select the location where the CSV file is stored.

C. Select the CSV file and click "Open". It opens the CSV file and displays the following pop-up.

Figure: Pop-up to upload the CSV file

D. Here, you can select the following options.

- Update Duplicate Records: By default, the Ameyo System will not upload those records of Customer Data which are already uploaded in the Ameyo System. You can check this option to update the already existing Customer Record with the latest data being uploaded.

  Example: If a customer already exists at the Process-level with the following attributes.

twitter	timezone	facebook	phone2	name	phone3	phor
john	Asia/Kolkata	john@domain.com	123456789	John		

  Now, an Administrator is uploading the following data, in which the phone2 column contains the different value and phone3 contains the new value.

twitter	timezone	facebook	phone2	name	phone3	p
john	Asia/Kolkata	john@domain.com	146797979	John	123479789	

  Now, if the Administrator have selected "Update Duplicate Records", then the Ameyo System will merge the changed values and add the new values in the existing customer record that would like the following data.

twitter	timezone	facebook	phone2	name	phone3	p
john	Asia/Kolkata	john@domain.com	146797979	John	123479789	

- Provide Header Mapping: Use this option if the name of any Column Header of the CSV file is different from the name of Table Definition Fields (of the process). With this checkbox, you can map the Column Headers of CSV file, having different name, to the Table Definition Fields. Select this checkbox to show the options to map the CSV Column Headers to the Table Definition fields.

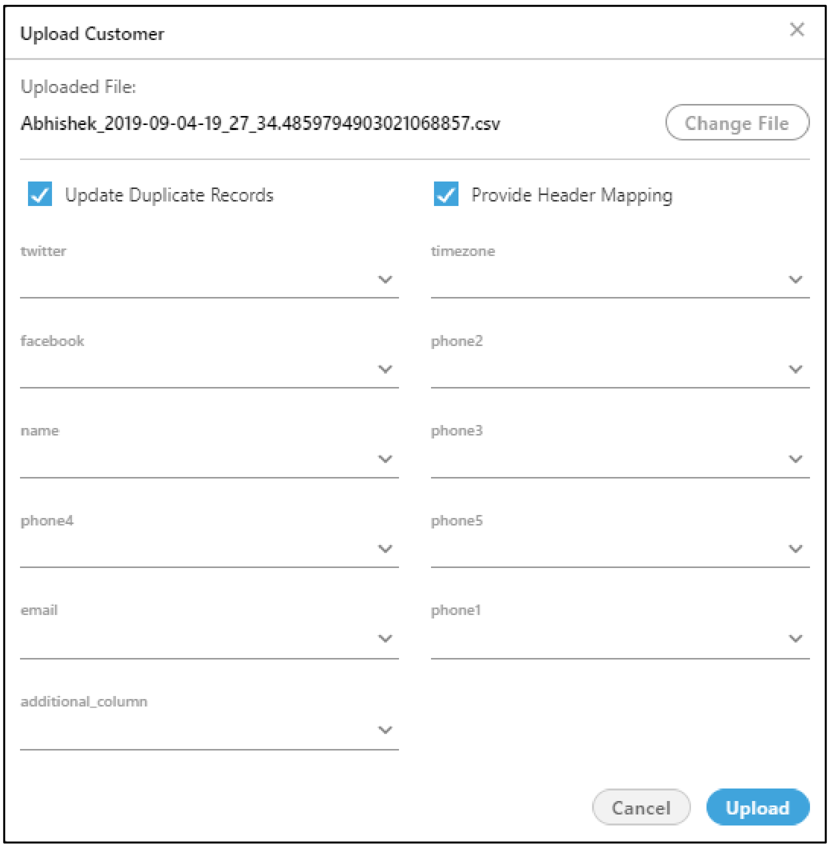


Figure: Map Headers of CSV with Table Definition Fields

The labels are Column Headers of CSV files whereas the Table Definition Fields are the values of drop-down menus.

If all Column Headers of the CSV file has the same name as that of Table Definition Fields, then the Administrator can skip this option.

E. Ameyo Preprocessor will validate the data during the upload process. It can skip uploading some data and throw errors for any invalid data.

- **Export:** Click this button to download the already uploaded Customer Data and save it in CSV file format on the disk.
- **Export and Extract:** Click this button to download the already uploaded Customer Data, save it in CSV file format on the disk, and remove the downloaded Customer Data from the Ameyo System permanently.

2. **<u>Create a new Rule</u>:** It lets the administrator to create the new rules for the customer's data. Perform the following steps to create the new rule.

1.

A. Click "New Rule" button. The following page is opened.

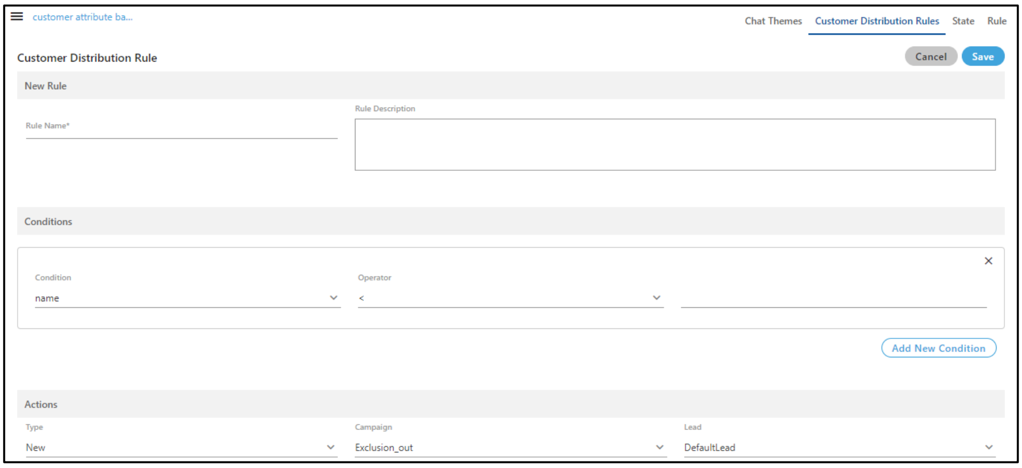


Figure: Create the new Rule

B. Provide the name of the rule in "Rule Name" column, through which you want to create the rule.

C. Enter the description of the rule in "Rule Description" textbox.

D. Click on the "Conditions" tab to provide the conditions. Select any of the following types of the condition from the drop-down list.

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

After selecting the condition, you have to select any of the following operators in "Operator" drop-down menu.

- <
- =
- !=
- >

Provide the value in the RHS section which satisfies for the given condition.

The administrator can provide multiple conditions for the single rule. Click "Add New Condition" button to provide multiple conditions.

E. Action: After providing the condition, now provide the action which will perform when the condition satisfies.

- Select the type of the action from the drop-down list of "Types". The actions available to select are "New," and "Upload".
  - **New:** The "NEW" action creates the new entry according to the condition given above.
  - **Upload:** The action "Upload" performs the following actions.
    I. Create the new customer if the customer matching the rule does not exist. It will update the customer records that are already available for distribution.
    II. Update the customer record that is already available for distribution.
    III. Update and migrate the customer record that is already available in a lead other than specified in the rule.
- Select the campaign on which you want to upload the customer details, from the drop-down list of "Campaigns".
- Select the lead on which you want to upload the data, from the "Lead" drop-down section.

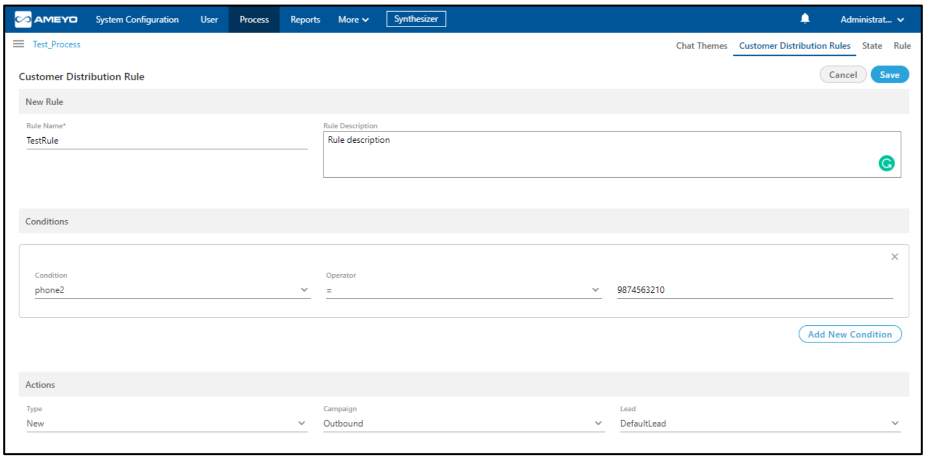
- 

Figure: Sample Rule

F. After providing all the information, click "Save" button to create a new rule. Clicking save button redirects you to the main page of the customer rule.

2. **Edit the Customer Distribution Rule:** The administrator can edit the created rule as well. Click  icon present in the actions column of the rule. The same page is opened as opened at the creation time of the rule.

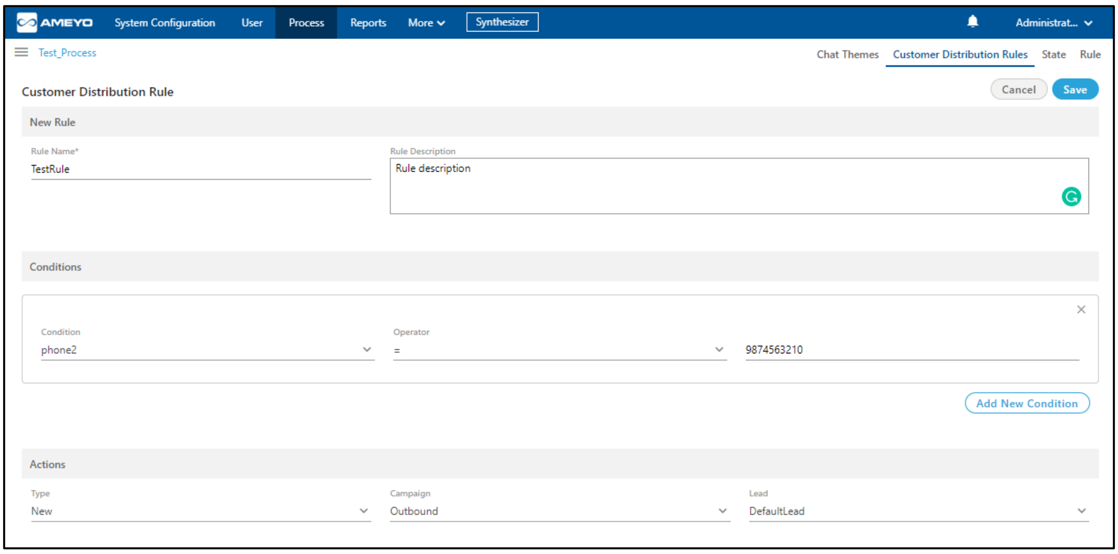


Figure: Edit the Rule

The administrator can change all the information of the rule.

Click "Save" button after editing the rule.

3. **<u>Delete the Customer Distribution Rule</u>:** The administrator can also delete the customer distribution rules. Select the rule which you want to delete and click icon present in the actions column of the rule. A confirmation pop-up is arised.

Figure: Delete the Rule

Click "Yes" button to delete the rule, else click "No".

If you want to delete multiple rules, then select all the rules and click "Delete" button to delete all the rules at one click.

If the rule is deleted, then it can not be retrieved in any manner.

4. **<u>Disable the Customer Distribution Rule</u>:** The administrator can disable the enabled rule. Perform the following steps to disable the rule.

4.
- Select the rule, which you want to disable.
- Toggle the switch present in the status column of the rule to disable the rule.

5. **<u>Enable the Customer Distribution Rule</u>:** The administrator can enable the disabled rule. Perform the following steps to enable the rule.
   - Click "View Disabled Rules" checkbox to see the list of the disabled rules.

- Select the rule, which you want to enable.
- Toggle the  switch present in the status column of the rule to enable the rule.

7.2.4 State Tab in Process Settings (Licensable)

The two tabs - States and Rules - in Process Settings are actually to integrate PACE with the Ameyo System. PACE (ProActive 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 beforehand. By analyzing this behavior, some rules have to create which PACE use to increase the overall productivity.

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

Suppose there is a contact center for which a CONNECTED call is a SALE. There are obviously some numbers with disposition FAILED, AMD, PROVIDER_FAILURE, and other states. Since the customer behavior and contact center requirements are known, the dialer should not dial (or dial in a less number) such customers again. But, if we use another 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 result in a 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.

7.2.4.2 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.

7.2.4.3 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 traveling 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'

7.2.5 States

The customers 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 percentage 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.

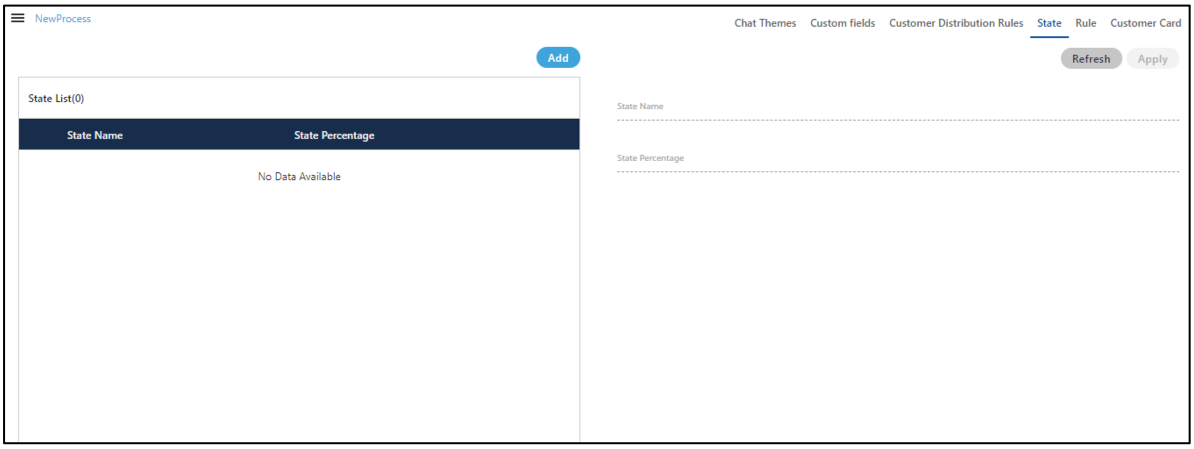


Figure: State Tab

7.2.5.1 Add a State

Perform the following steps to create a state.

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

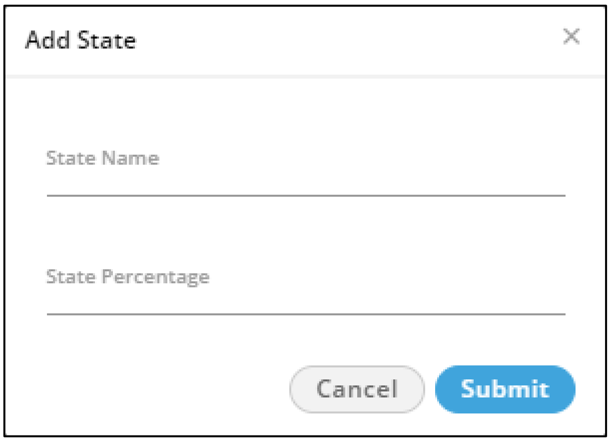


Figure: Add a State

2. Provide a name for the state.

3. Provide a dialing percentage.
   Make sure that the total percentage in a different state should not exceed 100.

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

7.2.5.2 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.

7.2.5.3 Modify a State

Perform the following steps to modify a state.

1. Select a state to view its details in the right section.

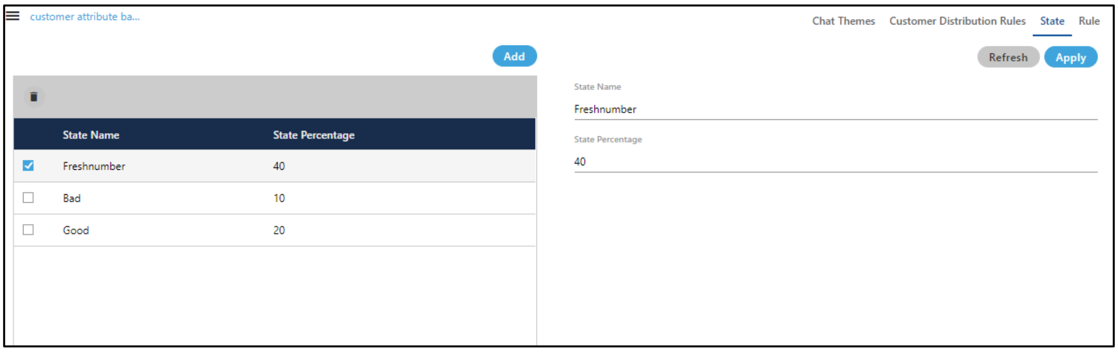


Figure: Details of a State

2. Here, you can change the following fields.

   A. State Name

B. State Percentage

Make sure that total percentage in all states should not exceed 100%.

3. Click "Apply" to apply the changes and save the modified state.

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

7.2.5.4 Delete a State

The Deleted State cannot be restored. If a state is being used in PACE and Predictive Dialling, then the deletion of that state will impact the functioning of PACE and Predictive Dialing.

Perform the following steps to delete a state.

1. Select a state to view its details in the right section.

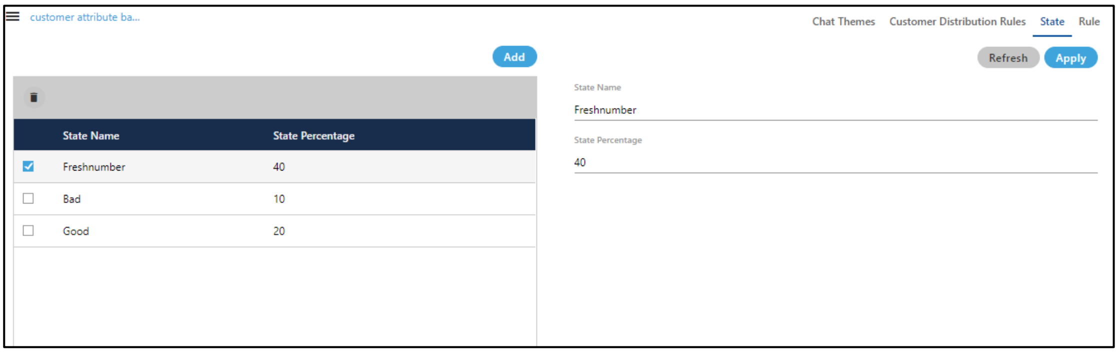


Figure: Details of a State

2. Click . It shows the following warning message.

Figure: Warning before deleting a State

3. Click "Yes" to delete the state.

7.2.6 Rule Tab for PACE in System Settings (Licensable)

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

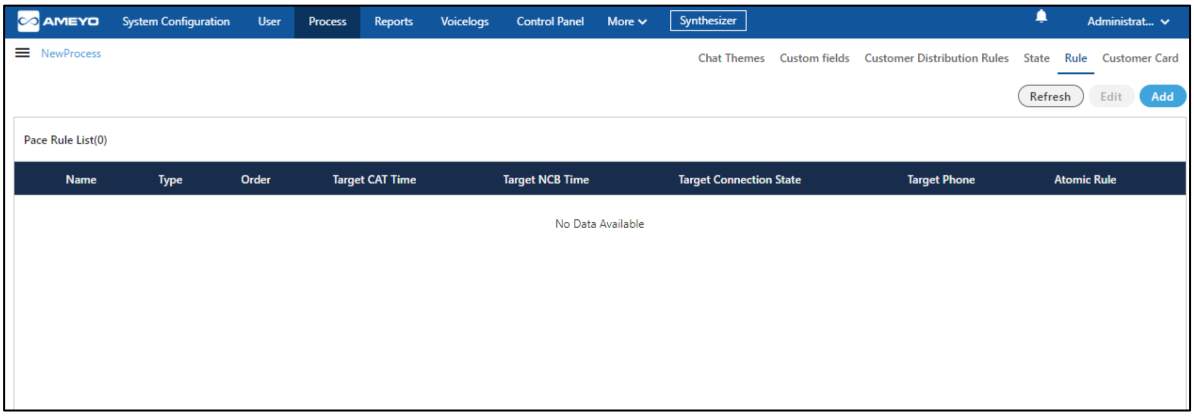


Figure: Rule Tab to Manage PACE

7.2.6.1 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. (Optional)CAT Time: Provide the target CAT (Call Around Time) in HH:MM:SS format. The call will be made to the customers only during this time.

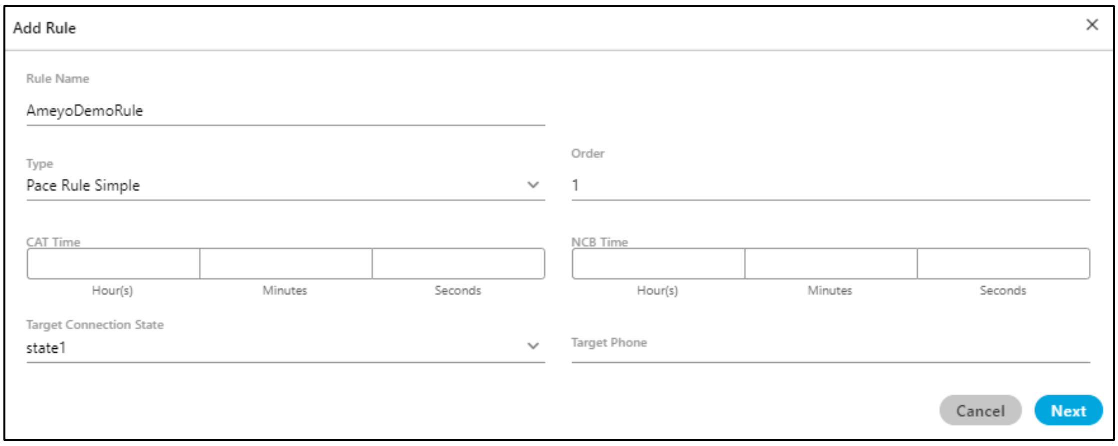


Figure: Optional Date and Time Field

Suppose a case where three different PACE states such as "state1", "state2", and "state3" have been created. After calling, the customer (say C1) is moved to from "state1" to "state2". If the PACE rule is applied again on the same customer (C1), then the customer will move from "state2" to "state3". But, if the Administrator wants to change the state of the customer (C1) back to "state1" from "state2" or "state3", then the Administrator has to create the rule and provide "0" (zero) values in both CAT and NCB fields. Instead of adding zero as value, these fields should remain blank to decrease the unnecessary manual inputs. To meet this requirement, the CAT and NCB fields in the PACE rules have made optional fields instead of being mandatory. (*) symbol with these fields have also been removed.

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.

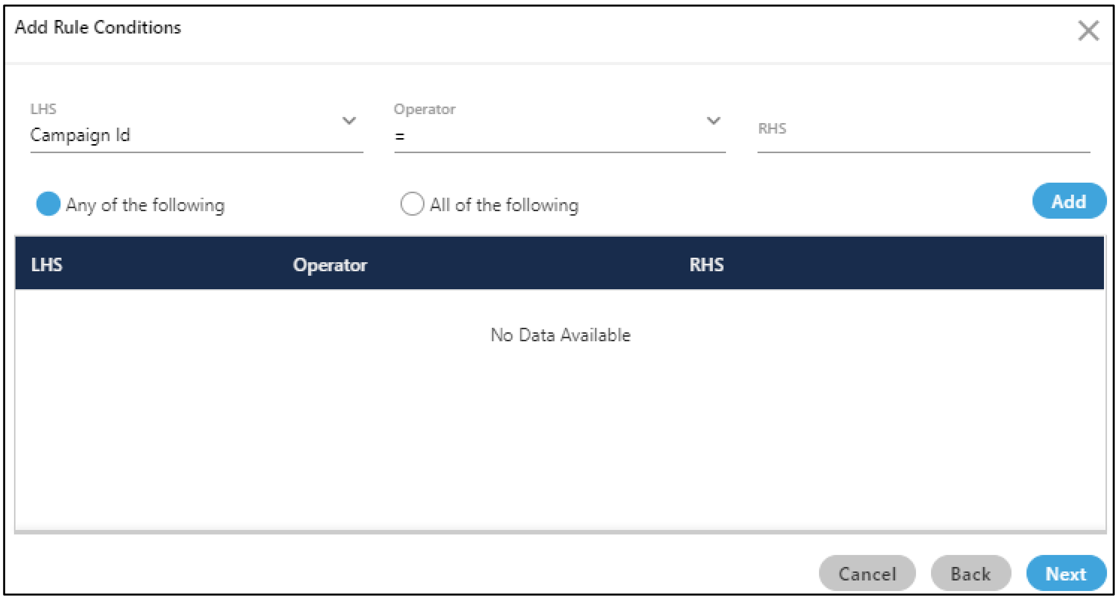


Figure: Add Condition

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

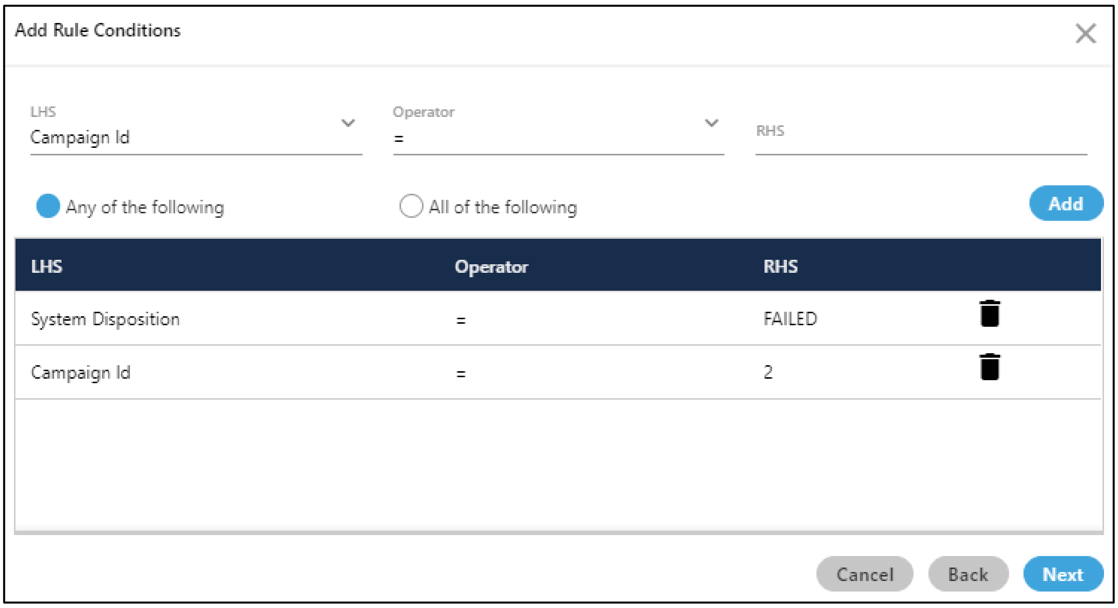


Figure: Add Conditions

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 not to 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 state (group of numbers) to the owner's lead, which meets the pre-selected conditions.
- **Move to lead:** Select it to move 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.

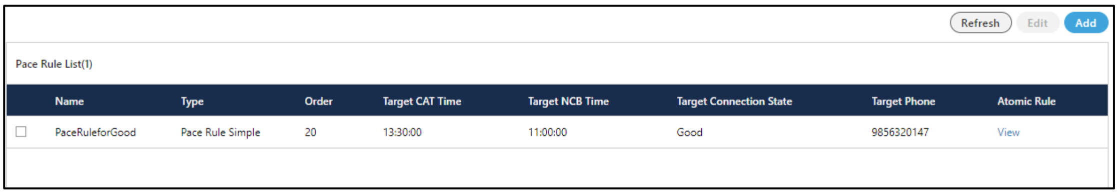


Figure: List of State Rules

7.2.6.2 Modify a PACE Rule

Perform the following steps to modify a PACE Rule.

1. Select a PACE Rule which you want to modify, and click "Edit" button.

Figure: Modify PACE Rule

2. The information of the selected rule is visible on the same modal which was used to create the rule.
3. Here, you can change the State Name and the State Percentage as well.

7.2.6.3 Delete a PACE Rule

Perform the following steps to delete a PACE Rule

1. Select the PACE Rule.
2. Click "Delete" button present on the top right corner to delete the PACE Rule. It shows the following pop-up.

Figure: Delete PACE Rule

3. Click "OK" to delete the Rule, else Click "Cancel" to cancel the seletion process.

7.2.7 Customer Card Tab in Process Settings

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

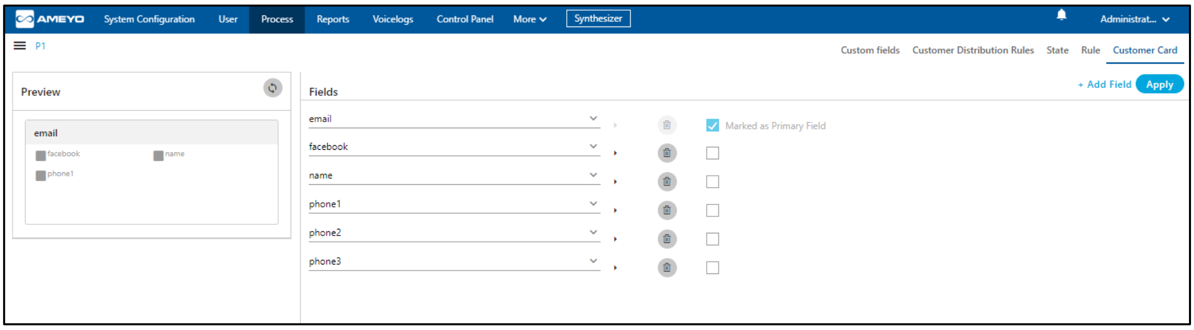


Figure: Customer Card Tab

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

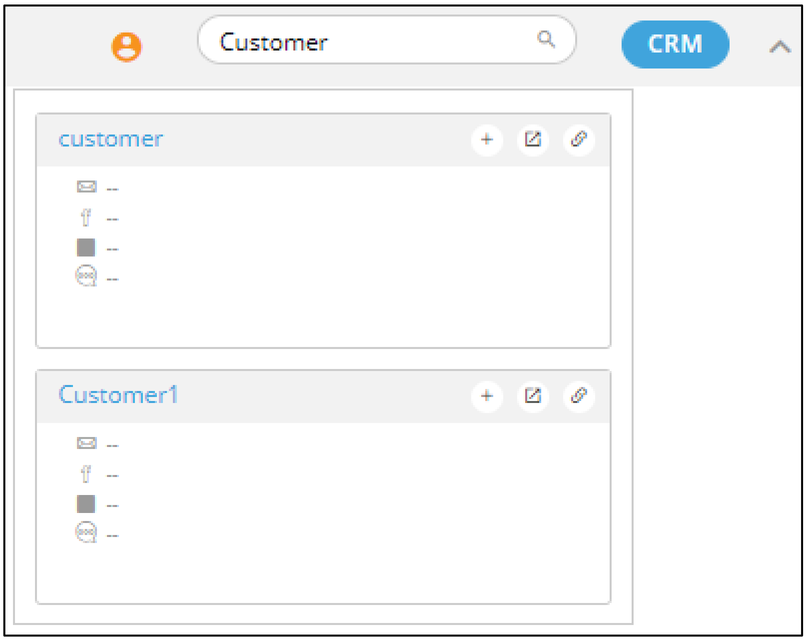


Figure: Displaying Customer Cards in Search

7.2.7.1 Default Fields

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

7.2.7.2 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.

7.2.7.3 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.

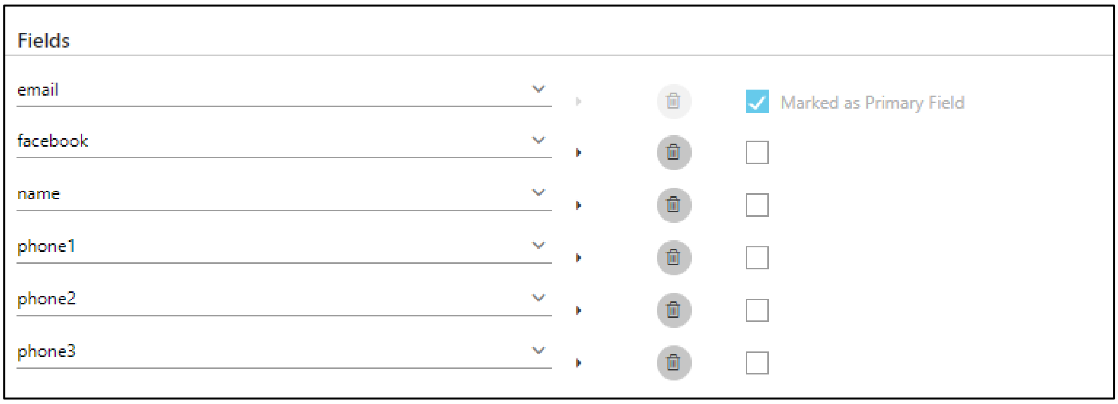


Figure: Add Customer Card

2. Select any field from the drop-down menu.

3. Click the icon to select any icon displayed in the following screenshot.

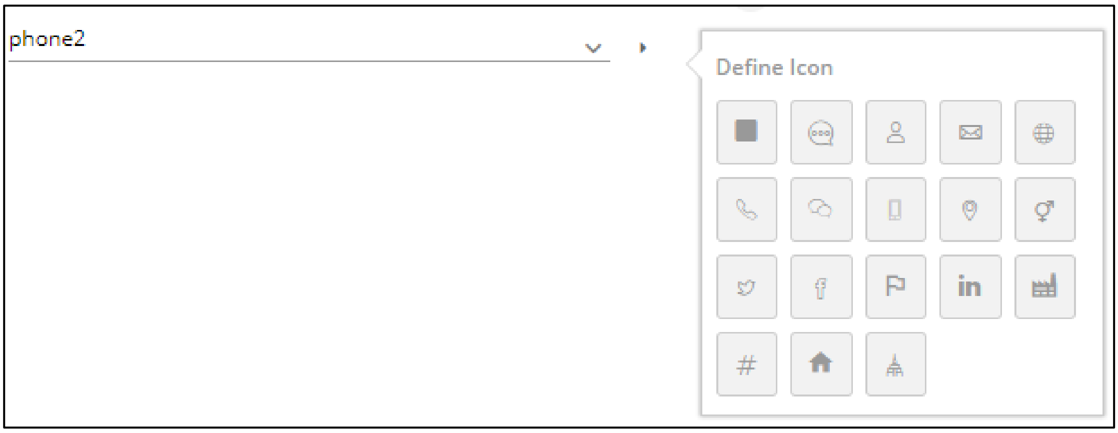


Figure: Select an icon

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

7.2.7.4 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.

7.2.7.5 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.

7.2.7.6 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.

7.2.7.7 Sample Customer Card

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

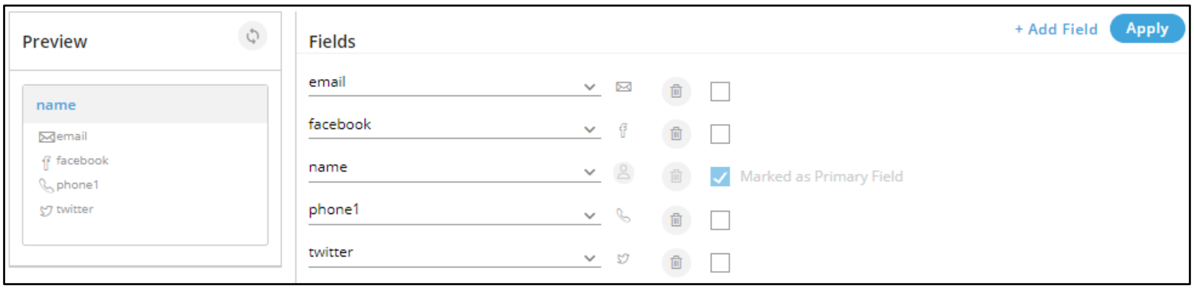


Figure: Modified Customer Card

8. 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.

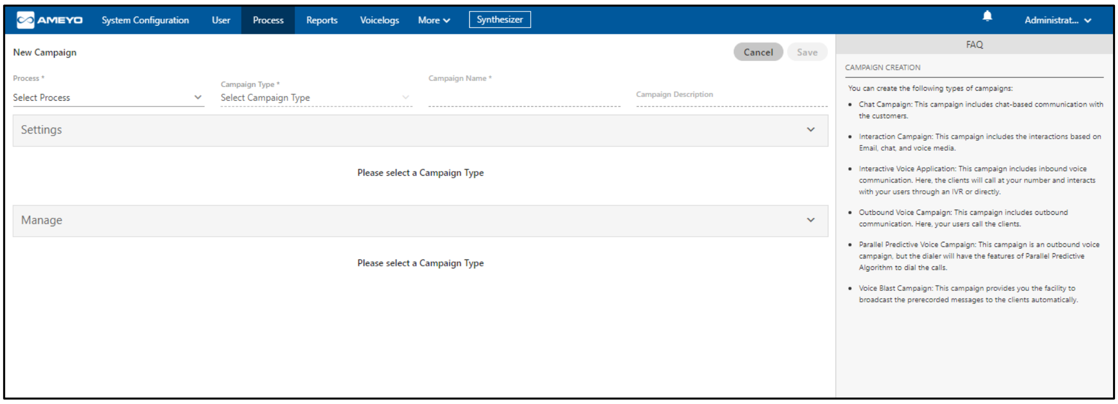


Figure: Create New Campaign

While creating the campaigns, the answers for some of the commonly asked questions have been listed. The administrator can refer to those definitions to know more about the campaign settings.

3. Provide the input 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. Chat Campaign: 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

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. Video Chat Campaign: This campaign includes video chat communication. In this campaign, the users will be able to recieve and attend the video calls initiated by the customers..

VI. 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.

VII. 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 steps are mentioned hereinbelow.

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/<CRM_Name>/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/<CRM_Name>/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/<CRM_Name>/disposition.php

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

Replace <CRM_Name> with the Name of the CRM created.

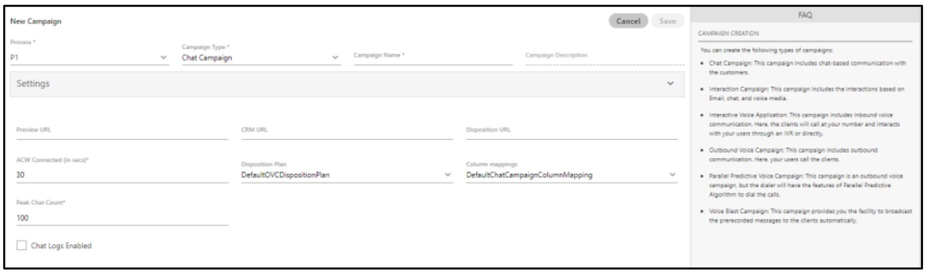


Figure: Creating New Chat Campaign

IV. ACW Connected(in sec): Provide the duration after which the idle chat session will be closed and disposed of.

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.

We support only one Interaction Campaign. It is advised to create multiple queues in IC to address the different functions of the business requirements (like sales, and support). However, the Queue Monitoring is not available in IC.
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/<CRM_Name>/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.

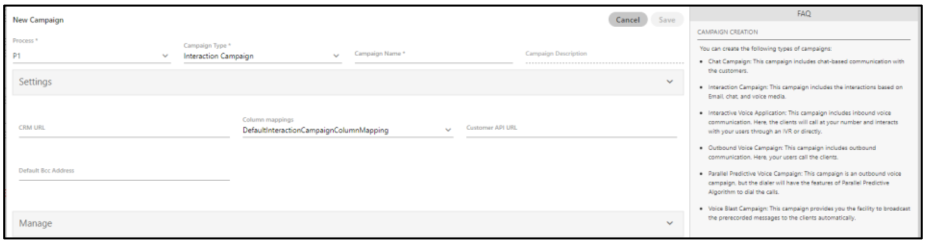


Figure: Creating New Interaction Campaign

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/<CRM_Name>/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/<CRM_Name>/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/<CRM_Name>/disposition.php

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

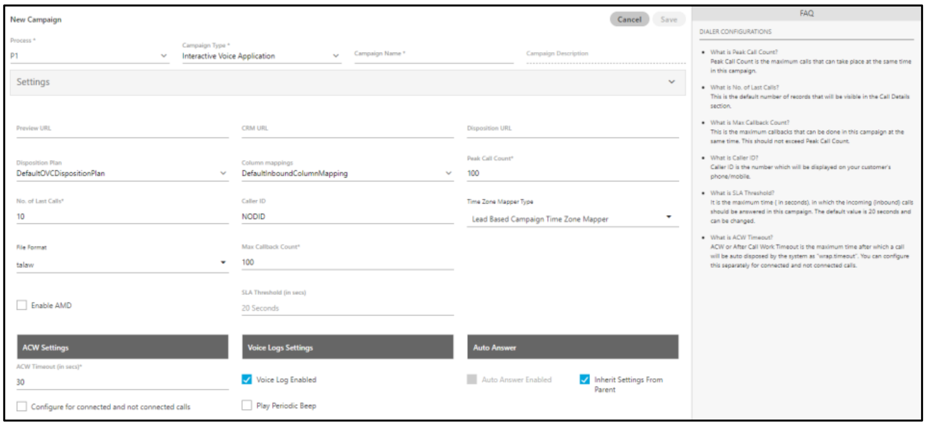


Figure: Creating New Interactive Voice Application Campaign

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

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

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

VI. 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.

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

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

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

with the same state will be dialed according to its time zone restriction/criteria.

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

- talaw
- tulaw
- tgsm
- tg729
- alaw

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

XII. 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.

XIII. SLA Threshold: Here, you can define the SLA Threshold, in which the incoming (inbound) calls should be answered in this campaign. The default value is 20 seconds, but it can be changed here.

XIV. ACW Settings: Here, you can apply the ACW Timeout Settings. A textbox named "ACW Timeout (in sec)", which is a mandatory field while creating or modifying the campaign. The Administrator have to provide the value between 1 and 3600 seconds, which is the duration in which the call (after disconnection) should be disposed of or wrapped. Here, you can configure this option for both "Connected Calls" (calls which are connected with both customer and agent) and "Not Connected Calls" (calls which cannot be connected with either agent, or customer, or both). Perform the following steps here.

3.

A.

I.

a. If you want to configure same ACW Timeout value for both Connected and Not Connected Calls, then just enter the timeout value.

b. If you want to configure different ACW Timeout value for Connected and Not Connected Calls, then check the box titled "Configure for Connected and Not Connected Calls". Once checked, it shows the different textboxes at the bottom.

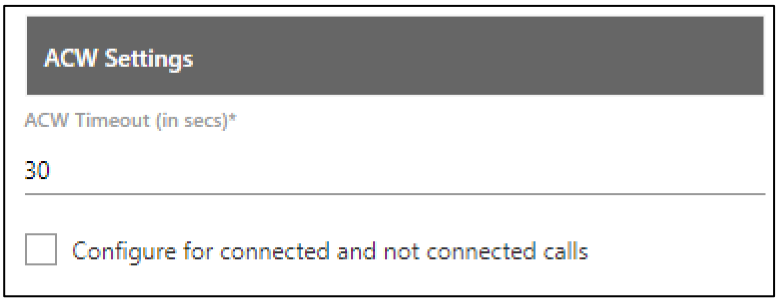


Figure: ACW Timeout

If you are enabling the option to give separate timeout values for Connected and Not Connected Calls, then their values should be different else the Ameyo System will not accept them. If both values are kept same, then the selection of "Configure for Connected and Not Connected Calls" will be undone.

The Agent has to dispose of the Connected or Not Connected Calls, after their disconnection within the specified ACW Timeouts else these calls will be automatically disposed of.

II. **Voice Logs Settings:** Here, you can manage the settings related to the Voicelogs.

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

   b. **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.

III. **Auto Answer Enabled**: Check this box to enable the auto answer of the call for the campaign. This check box will be remained disabled, if the Auto-Answer setting is not enabled in the system settings.

IV. **Inherit Settings from Parent**: Check this box to inherit the settings from the parent, that is, from the system settings. It means that, if the settings in the system is enabled to the auto-answer then, auto-answer setting will be same for the campaign. You can disable the auto-answer settings from here, as well.

B. **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/<CRM_Name>/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/<CRM_Name>/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/<CRM_Name>/disposition.php

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

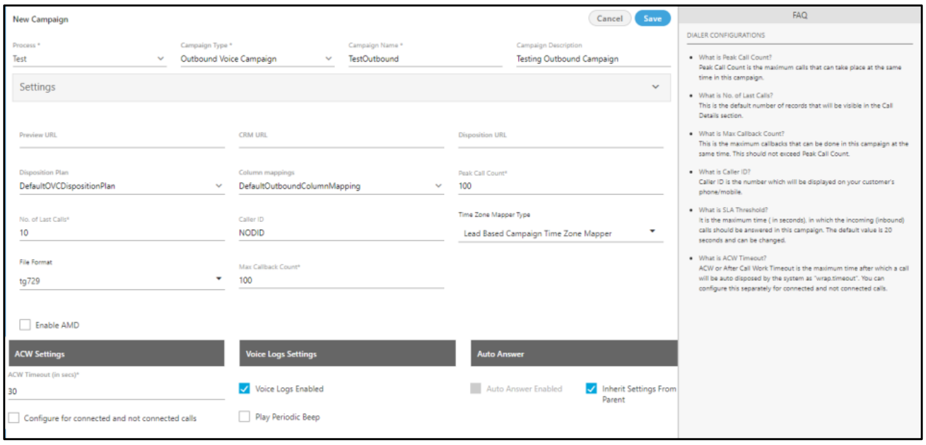


Figure: Creating New Outbound Voice Campaign

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

3.

A.

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

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

III. 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.

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

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

VI. 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, time zone of the customer is specified from the time zone set in the lead settings.
   - **Default Campaign Time zone Mapper:** In this case time zone is determined from customer data. We get the time zone info from

the column specified against time zone column mapping in the campaign.

- **Phone Pattern Based Campaign Time zone Mapper:** It is related to number management in Ameyo. With phone pattern based campaign time zone mapper, country code and area code can be mapped to a time zone and all numbers with that country code and area code will be dialed according to that time zone restriction/criteria.
- **State Based Campaign Time zone Mapper:** It is related to number management in Ameyo. With state based campaign time zone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialed according to its time zone restriction/criteria.

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

- talaw
- tulaw
- tgsm
- tg729
- alaw

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

IX. 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.

X. ACW Settings: Here, you can apply the ACW Timeout Settings. A textbox named "ACW Timeout (in sec)", which is a mandatory field while creating or modifying the campaign. The Administrator have to provide the value between 1 and 3600 seconds, which is the duration in which the call (after disconnection) should be disposed of or wrapped. Here, you can configure this option for both "Connected Calls" (calls which are connected with both customer and agent) and "Not Connected Calls" (calls which cannot be connected with either agent, or customer, or both). Perform the following steps here.

3.

A.

I.

a. If you want to configure same ACW Timeout value for both Connected and Not Connected Calls, then just enter the timeout value.

b. If you want to configure different ACW Timeout value for Connected and Not Connected Calls, then check the box titled "Configure for Connected and Not Connected Calls". Once checked, it shows the different textboxes at the bottom.

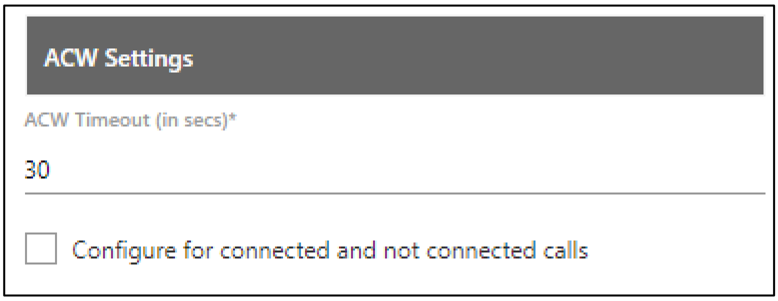


Figure: ACW Timeout

If you are enabling the option to give separate timeout values for Connected and Not Connected Calls, then their values should be different else the Ameyo System will not accept them. If both values are kept same, then the selection of "Configure for Connected and Not Connected Calls" will be undone.

The Agent has to dispose of the Connected or Not Connected Calls, after their disconnection within the specified ACW Timeouts else these calls will be automatically disposed of.

II. **Voice Logs Settings:** Here, you can manage the settings related to the Voicelogs.

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

b. **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.

III. **Auto Answer Enabled**: Check this box to enable the auto answer of the call for the campaign. This check box will be remained disabled, if the Auto-Answer setting is not enabled in the system settings.

IV. **Inherit Settings from Parent**: Check this box to inherit the settings from the parent, that is, from the system settings. It means that, if the settings in the system is enabled to the auto-answer then, auto-answer setting will be same for the campaign. You can disable the auto-answer settings from here, as well.

B. **Parallel Predictive Voice Campaign:** Provide the following inputs to create a voice campaign that will be equipped with the features of Predictive Dialing 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/<CRM_Name>/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/<CRM_Name>/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/<CRM_Name>/disposition.ph
p

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

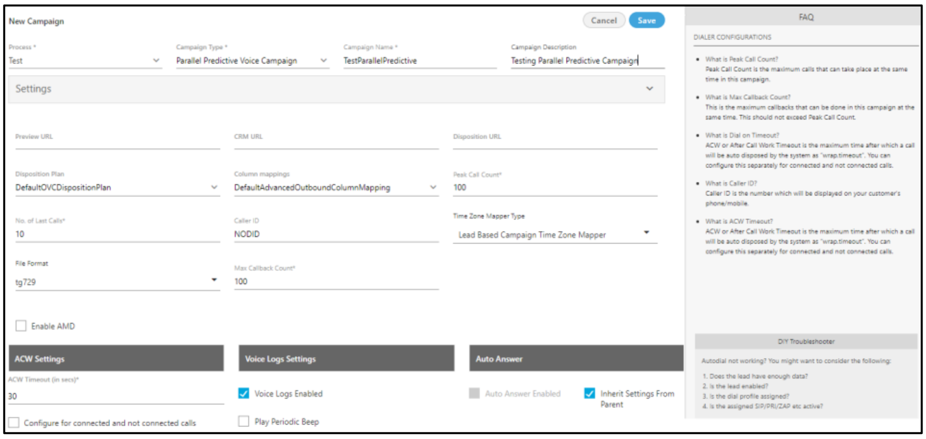


Figure: Creating New Parallel Predictive Voice Campaign

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

3.

A.

I.

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

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

III. 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.

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

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

VI. 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, time zone of the customer is specified from the time zone set in the lead settings.
- **Default Campaign Time zone Mapper:** In this case time zone is determined from customer data. We get the time zone info from the column specified against time zone column mapping in the campaign.
- **Phone Pattern Based Campaign Time zone Mapper:** It is related to number management in Ameyo. With phone pattern based campaign time zone mapper, country code and area code can be mapped to a time zone and all numbers with that country code and area code will be dialed according to that time zone restriction/criteria.
- **State Based Campaign Time zone Mapper:** It is related to number management in Ameyo.

With state based campaign time zone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialed according to its time zone restriction/criteria.

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

- talaw
- tulaw
- tgsm
- tg729
- alaw

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

IX. 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.

X. ACW Settings: Here, you can apply the ACW Timeout Settings. A textbox named "ACW Timeout (in sec)", which is a mandatory field while creating or modifying the campaign. The Administrator have to provide the value between 1 and 3600 seconds, which is the duration in which the call (after disconnection) should be disposed of or wrapped. Here, you can configure this option for both "Connected Calls" (calls which are connected with both customer and agent) and "Not Connected Calls" (calls which cannot be connected with either agent, or customer, or both). Perform the following steps here.

3.

A.

I.

a. If you want to configure same ACW Timeout value for both Connected and Not Connected Calls, then just enter the timeout value.

b. If you want to configure different ACW Timeout value for Connected and Not Connected Calls, then check the box titled "Configure for Connected and Not Connected Calls". Once checked, it shows the different textboxes at the bottom.

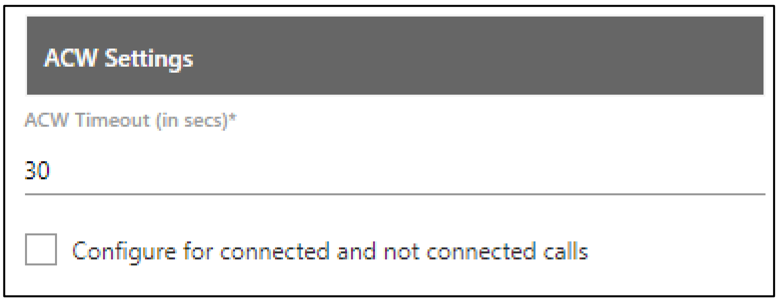


Figure: ACW Timeout

If you are enabling the option to give separate timeout values for Connected and Not Connected Calls, then their values should be different else the Ameyo System will not accept them. If both values are kept same, then the selection of "Configure for Connected and Not Connected Calls" will be undone.

The Agent has to dispose of the Connected or Not Connected Calls, after their disconnection within the specified ACW Timeouts else these calls will be automatically disposed of.

II. **<u>Voice Logs Settings</u>:** Here, you can manage the settings related to the Voicelogs.

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

b. **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.

B. **<u>Voice Blast Campaign:</u>** Provide the following inputs to create the campaign that broadcasts the pre-recorded voice messages automatically to the provided list of numbers.

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

II. <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.

III. <u>Call ID</u>: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.

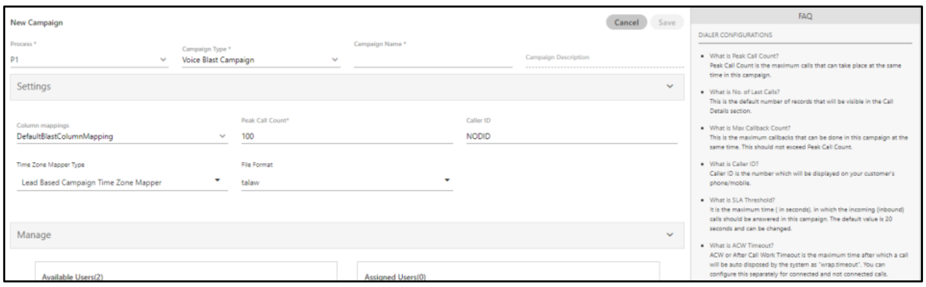


Figure: Creating New Voice Blast Campaign

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

3.

A.

I.

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

mentioned in their details and all numbers with the same state will be dialed according to its time zone restriction/criteria.

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

- wav
- talaw
- tulaw
- tgsm
- tg729
- alaw

4. **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.

4.

- Supervisor
- Professional-Agent
- Executive
- Analyst
- Group Manager
- Only Supervisors can be added in Voice Blast Campaign.

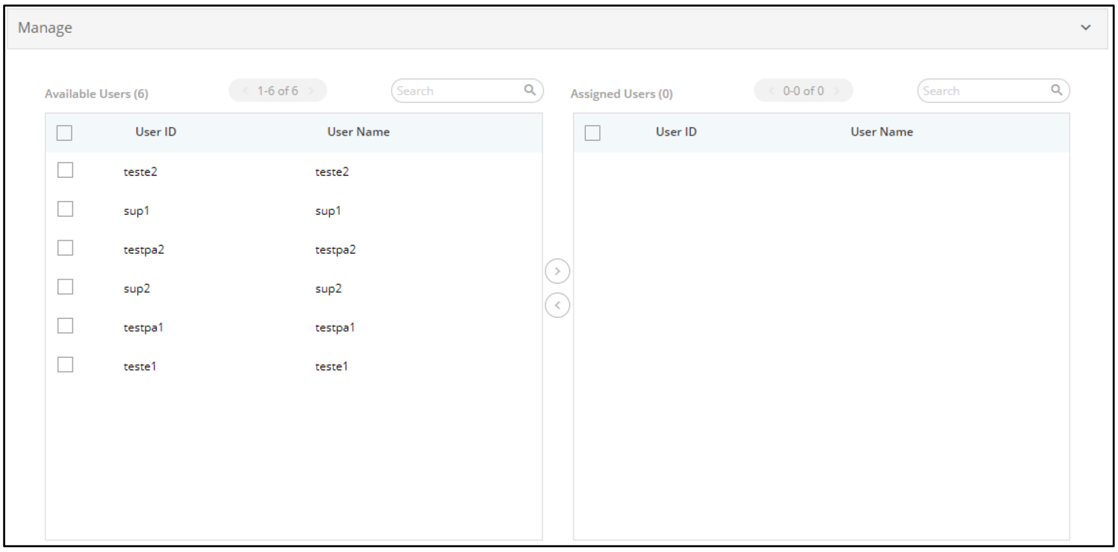


Figure: Section to assign users

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

4.
   A. Select the users from the "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.

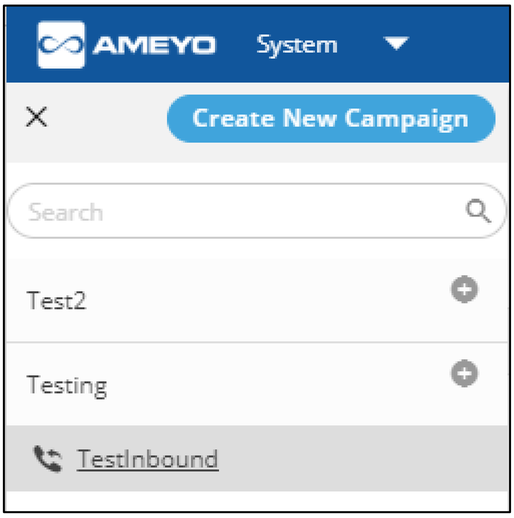


Figure: Created the Campaign

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

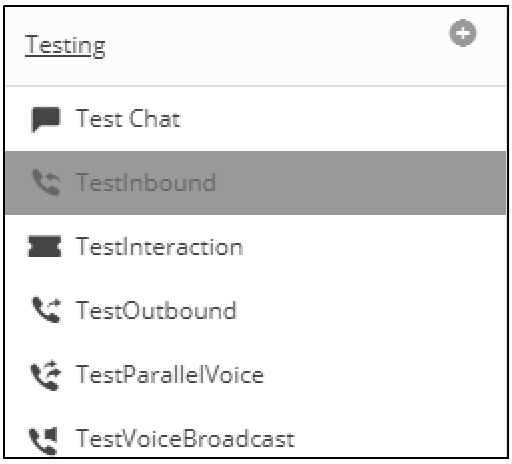


Figure: Created Multiple Campaigns

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.

9. 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.

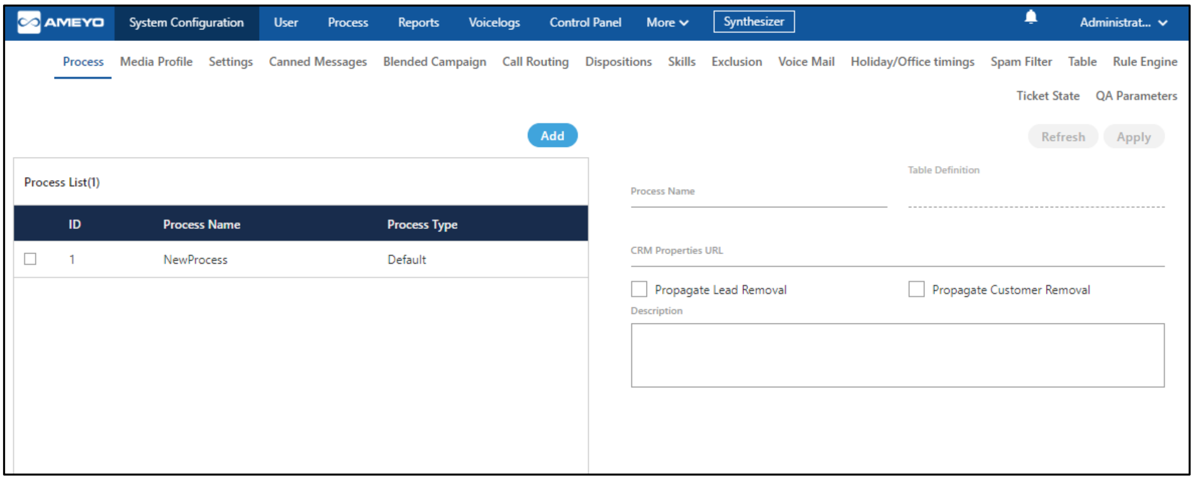


Figure: New Tabs after creating the campaign

Click the links to know more about them.

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

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

9.1 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.

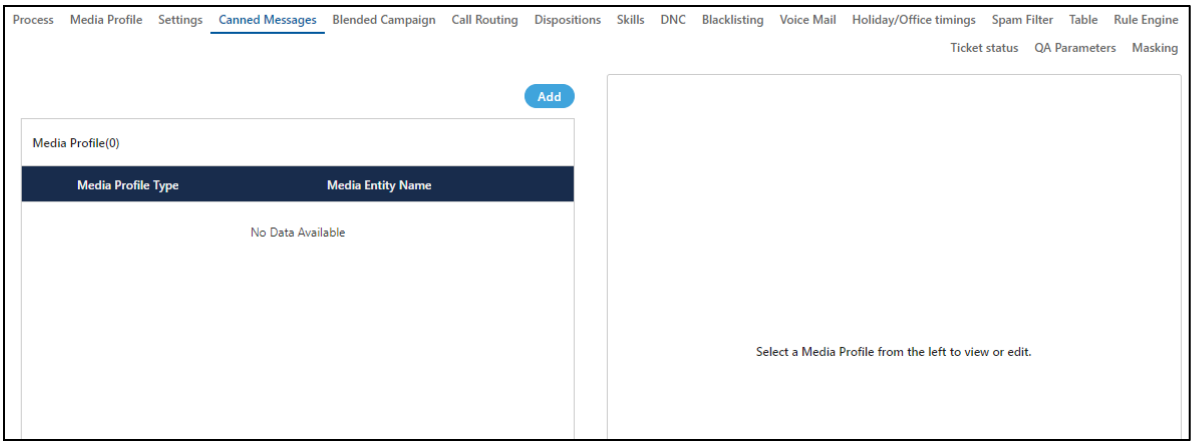


Figure: Media Profile Page

Types of Media Profiles are listed herein below. You can create, modify, and delete the media profiles. Click the links to know more about them.

- Email Media Profile

- **Facebook Media Profile:** Integration of Facebook as media profile has certain steps and procedures. Click here to know the steps to integrate Facebook as Media Profile
- **Twitter Media Profile:** Integration of Twitter as media profile has certain steps and procedures. Click here to know the steps to integrate Twitter as Media Profile
- **SMS Media Profile:** Integration of SMS as media profile has certain steps and procedures. Click here to know the steps to integrate SMS as Media Profile

9.1.1 Email Media Profile

As the name suggests, it lets the Administrator 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.

9.1.1.1 Create Email Media Profile

When we create Email Media Profile, then it starts fetching the emails immediately at once. If no routing rule is created to add the fetched emails to a particular campaign or a particular queue, then these fetched emails will not be displayed in the system. Also, the rule to route the emails can be created only after creating the media profile. Therefore, it is suggested to create an incomplete email media profile by some steps such as provide a wrong username or password. After it, create a routing rule in "Rule Engine" → "Routing" by selecting this Email media profile and select the required both queue and campaign. After creating the rule, correct the issues in Media Profile. Now, the emails will be fetched and displayed in the system.

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.

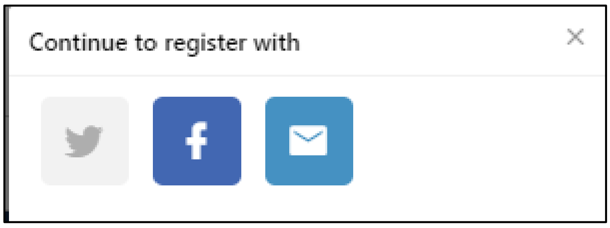


Figure: Register a Media Profile

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

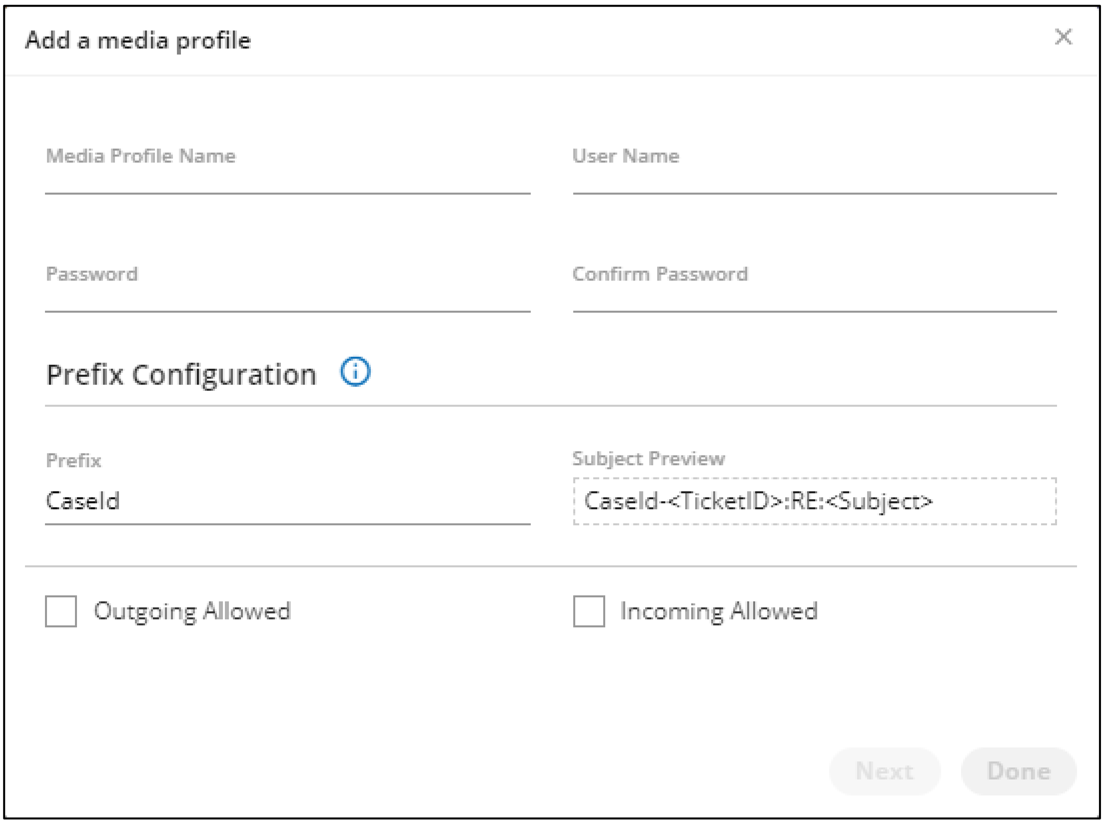


Figure: Create Email Media Profile

3. **Media Profile Name:** Provide a name for the new media profile.

4. **User Name:** Provide the email address as the username.

5. **Password:** Provide a password for the email address entered in "username" field.

   A user can generate App-Specific Password through its Google Account Settings and use this App-Specific Password as a password to its Gmail Account while creating an Email Media Profile.

6. **Confirm Password:** Re-enter the same password to confirm.
7. **Send From (Name):** Provide a name of the sender. All emails sent from this media profile will display this name as "Sender's Name". The limit of 52 characters has been applied to "Send from Name" field. While creating or modifying an Email Media Profile, the number of consumed character limits and the maximum character limit is displayed at the bottom of "Send from Name" field. Refer to the following screenshot.

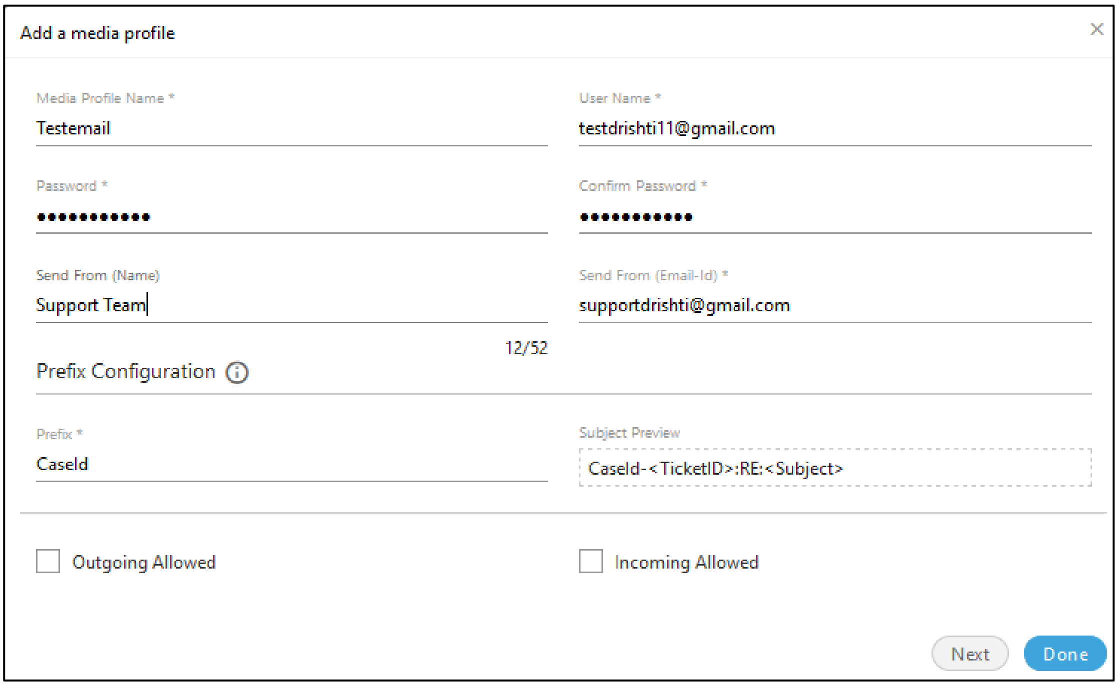


Figure: Send from the Email ID

If a user tries to provide more than 52 characters in "Send from Name" field while adding or modifying an Email Media Profile, then it will show an error below the field that "You have exceeded the maximum character limit."

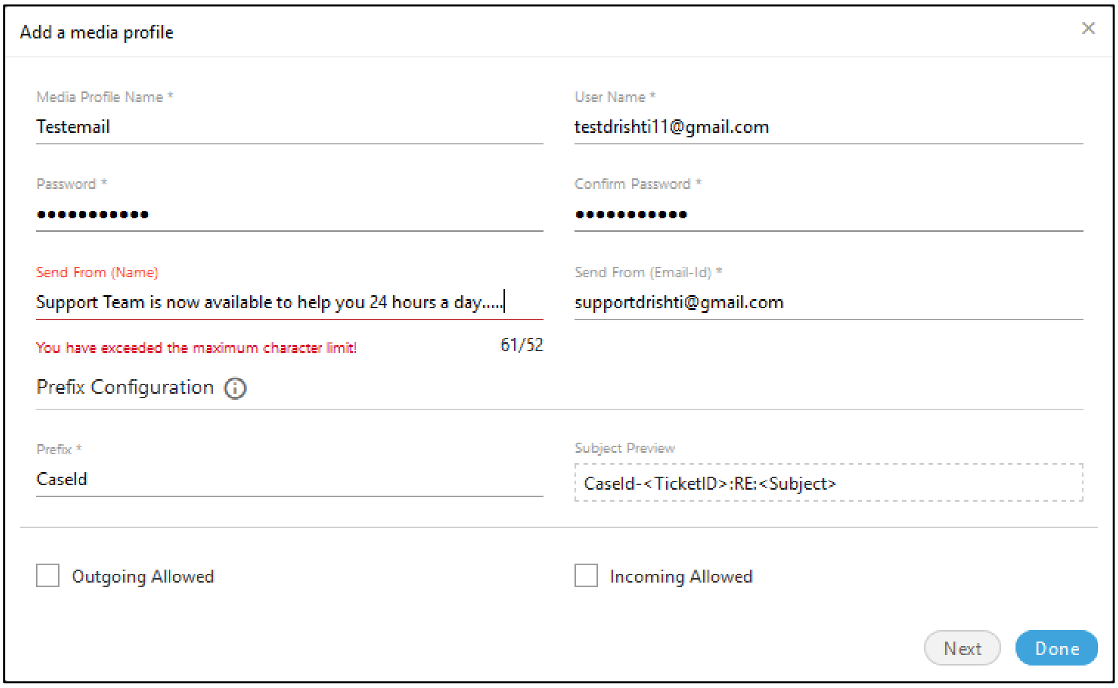


Figure: Error while entering characters more than 52

8. **Send From (Email Address):** Provide a sender's email address.

   When an agent uses this media profile to send the email, then "Send from Email Address" will be stored and displayed as the sender's address in its ticket in "Activity".

9. **Prefix:** Provide a prefix for the subjects.

10. **Subject Preview:** Provide the subject that will be sent with the emails sent using this profile.

11. **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, then 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.

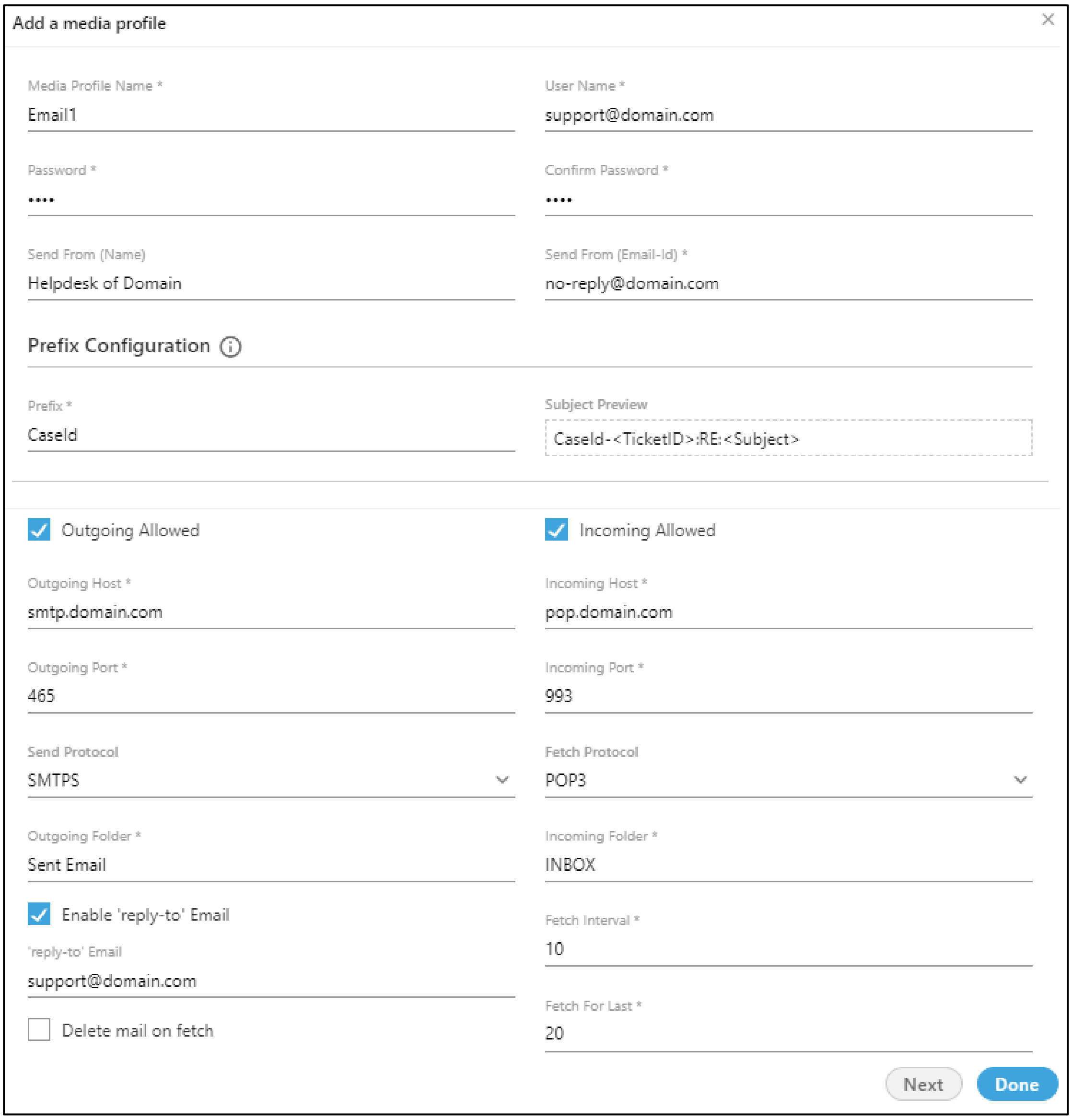


Figure: Sample Email Media Profile

Fetched Emails will not be displayed in the system until the Routing Rule to direct these emails to a particular campaign and queue. And the rule cannot be created until the Media Profile is created. Therefore, provide some wrong details here and create an incomplete media profile. After creation of profile, create a rule in "Rule Engine" → "Routing" the fetched emails to the particular campaign and queue and then modify this email media profile with correct details.

12. **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 incoming emails.

    E. Fetch Interval: Provide a value in seconds. It is the time after which the system will fetch the emails from inbox of the configured media profile. The default value is 10 seconds.

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

13. Here, you can perform any of the following steps.
    A. Click "Next" to go to "Ticket Resolvers" page of the pop-up.

Figure: Ticket Resolver while adding Email Media Profile

Refer to "Ticket Resolvers" Section in this page to know which Ticket Resolvers have to be selected. After it, you can perform any of the following steps.

12.

A.

I. Click "Next" to go to "Define Signature" page of pop-up.

Figure: Ticket Resolver while adding Email Media Profile

Refer to "Signature" Section of this page to know how to define the Signature.

After it, click "Submit" to save the default signature. You can also click "Cancel" to not save it.

II. Click "Finish" to save the Email Media Profile and to finish this process.

B. You can also click "Done" to save the Email Media Resolver.

Protocol-related Information: The Email Sender Protocol such as SMTP and Email Receiver Protocols such as IMAP and POP, and their folders cannot be changed after creating the media profile.

9.1.1.2 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.

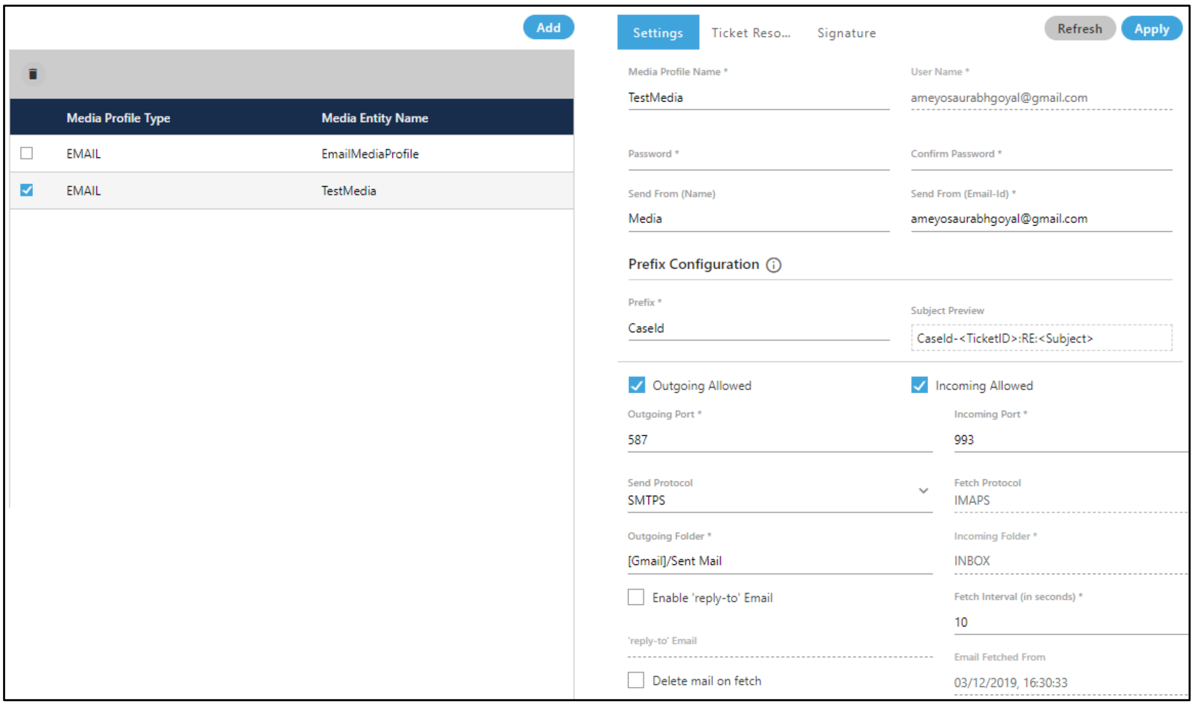


Figure: Settings of Email Media Profile

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

While editing the media profile, the Email Sender Protocol such as SMTP and Email Receiver Protocols such as IMAP and POP, and their folders cannot be changed.

If you want to change these settings, then, create the new media profile.

The Email Sender Protocol such as SMTP and Email Receiver Protocols such as IMAP and POP, and their folders cannot be changed after creating the media profile. These protocols and folders cannot be changed for the existing Media Profiles.

9.1.1.3 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.

9.1.1.4 Ticket Resolver for Email Media Profile

All Email Media Profile resolvers listed here are now improved that they will work for all email addresses available in the Customer Account Information. These Ticket Resolvers will also work for splitted and merged tickets.

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 from same source media profile :** Select it to create a single ticket for all emails from a same source media profile. It means the email coming from a same email address but to a different media profile will create a different ticket. It acts quite similar to "Single Ticket for each customer" to create a single ticket for each customer; however, it appends the emails to a ticket after checking the Media Profile ID.

  Suppose there are separate media profiles IDs for Customer Care and Sales Team. Emails of the customer to the Sales Team will be added to a separate ticket of Sales Department. Similarly, emails to

Customer Care will be added to the separate ticket of Customer Care. Without this resolver, all emails of the customers to both Sales and Customer Care will be added to a single ticket only.

- **Single ticket for each customer:** Select it to create a single ticket for all emails from a customer in the campaign. 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 added into the same ticket.
- **Single ticket of same subject from same customer:** Select it to create a single ticket for all emails having same subject sent from the same customer.
- **Case ID based Resolver:** A case is created for a new email. All emails replied on this email thread, then these will be appended to the same ticket. If a new email thread is created, a new ticket will be created.
- **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. A New ticket will be

created only when the customer sends an email with another subject to same media profile or connect with other media profiles with same or another 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.

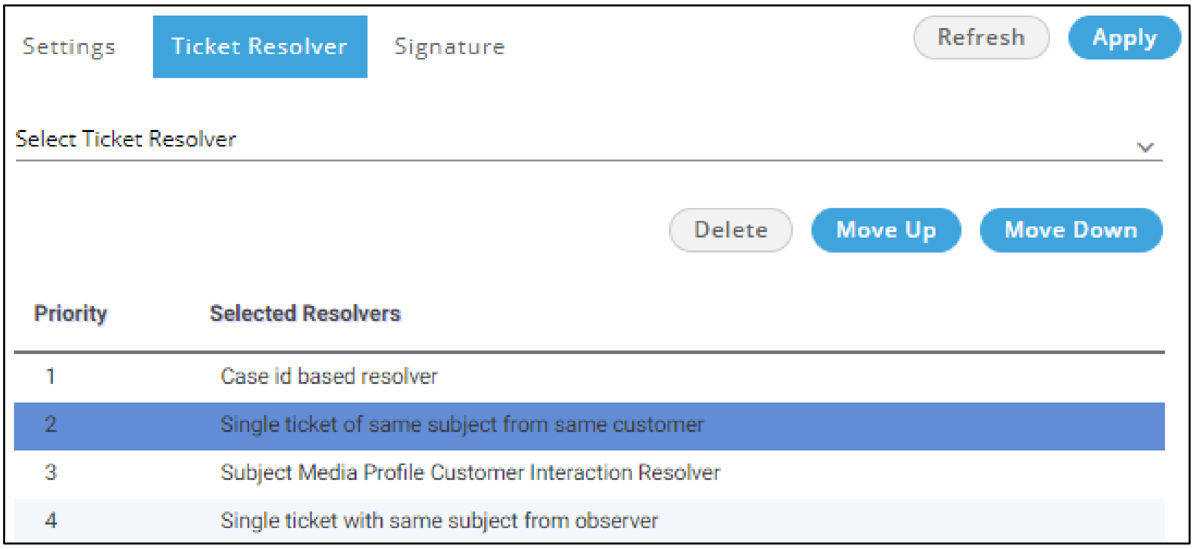


Figure: Added Ticket Resolvers

9.1.1.5 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.

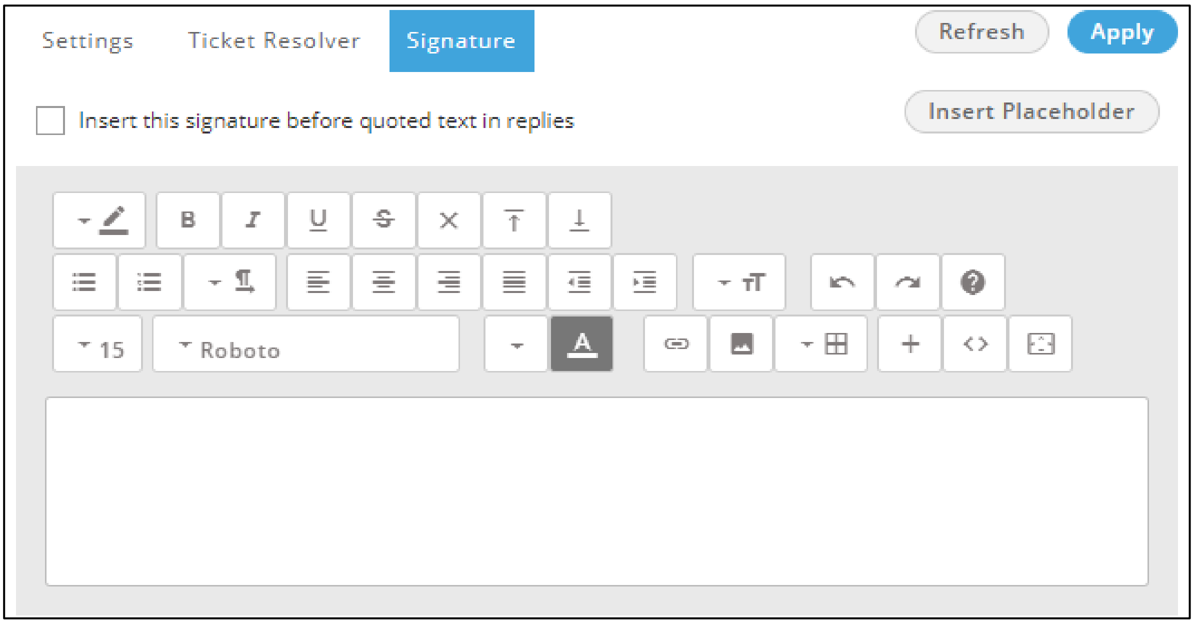


Figure: Blank Email Signature

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.

9.1.1.6 Failure Mail Configuration

The administrator can configure failure mail settings for the Email Media Profile. When the mail-id of the customer is wrong, then the mail sent to the customer is considered as failure mail.

The failure mail can only be configured for “Customer Based Resolver.” If the resolver is “Case Id Based” then a new ticket will be created for the same failure mail. The failure email will get the escalation mark on the dashboard screen of the agent. The agent can reply on the same ticket, and hence the ticket will handled.

Execute the following command to login to the database.

psql -U postgres ameyodb

1. Execute the following query for the Gmail based email profile.

   INSERT INTO ic_configuration_parameter (contact_center_id,name,value) Values (<contact_center_id>,'failureMailConfiguration','mailer-daemon@googlemail.com');

2. Execute the following query for the Yahoo based email profile.

   INSERT INTO ic_configuration_parameter (contact_center_id,name,value) Values ('<contact_center_id>','failureMailConfiguration','mailer-daemon@yahoomail.com');


```
ameyodb=#  insert into ic_configuration_parameter (contact_center_id,name,value)values(1,'failureMailConfiguration','mailer-daemon@googlemail.com');
INSERT 0 1
ameyodb=# select * from ic_configuration_parameter where name ilike '%fail%';
 id | contact_center_id |           name           |            value             |         date_added         |        date_modified
----+-------------------+--------------------------+------------------------------+----------------------------+----------------------------
 11 |                 1 | failureMailConfiguration | mailer-daemon@googlemail.com | 2019-09-16 22:15:35.94415 | 2019-09-16 22:15:35.94415
(1 row)

ameyodb=#
```

Figure: Gmail based Failure Message Configuration

9.1.1.7 Mapping Incoming and Outgoing Media Profile

The administrator can map any incoming media profile with some other outgoing media profile.

Example

Let's assume there are two media profiles named as M1 and M2. If a ticket is coming from media profile M1, then the administrator can map the media profile M1 with M2, which means if ticket is coming from M1, then while answering on the same ticket, the media profile M2 will select automatically.

Execute the following query to map the incoming media profile with another outgoing media profile.

INSERT INTO ic_configuration_parameter (contact_center_id,name,value) VALUES ('<contact_center_id>','mediaProfileMapping','{"<Incoming_Media_Profile_Id>":"<Outgoing_Media_Profile_Id>"}');

In the above query, the Incoming_Media_Profile_Id is the Id of the incoming media profile and Outgoing_Media_Profile_Id is the Id of the outgoing media profile id.
With the help of the above query, you can define multiple mappings for multiple set of media profiles.

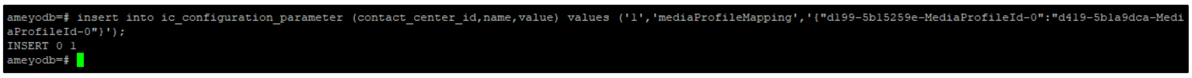


Figure: Mapping of Two media profiles

If do not have the media profile id, then run the following query and copy the respective media profile id.
Select * from media_profile;

9.1.1.8 Handling the Email Server Error Messages and Retry Sending Policies in Ameyo

Ameyo introduces the Handling to manage the error messages thrown by the Email Provider Server of an email address and . The following four different policies have been introduced to handle such error messages.

1. **Default Retry:** Select it to retry sending the email just after the failure. It's configuration code is "DEFAULT_ENTRY". "maxRetryCount" variable is used to define its value and its default value is 3.
2. **Rate Limit Retry:** Select it to retry sending the email when retry rate limits of the server are breached. By default, the retry is tried to be attempted after 24 hours. It's configuration code is "RATE_LIMIT_RETRY". "rateLimitRetryTime" variable is used to define its value and its default value is 86,400 seconds (that is 24 hours).
3. **Progressive Retry:** Select it to attempt the retry in the progressive intervals such as every 5 minutes, 10 minutes, 15 minutes, and 20 minutes. It's configuration code is "PROGRESSIVE_RETRY". "progressiveRetryInterval" variable is used to define its value and its default value is 300 seconds (that is 5 minutes).
4. **No Retry:** There are some error messages for which the retry sending should not be tried again. It's configuration code is "NO_RETRY".

These policies come preconfigured in Ameyo and apply automatically upon detecting their relevant error codes. For example, the following table illustrates the Gmail Error Codes and the corresponding Ameyo Email Error Handling Policy for them.

Gmail Error Codes	Ameyo Email Error Handling Policy
UNIDENTIFIED_ERROR	DEFAULT_RETRY
ADDRESSING_ERROR	NO_RETRY
MAILBOX_ERROR	PROGRESSIVE_RETRY
MAIL_SYSTEM_ERROR	PROGRESSIVE_RETRY
NETWORK_ROUTING_ERROR	RATE_LIMIT_RETRY
MAIL_DELIVERY_PROTOCOL_ERROR	NO_RETRY
MESSAGE_CONTENT_ERROR	NO_RETRY
SECURITY_POLICY_ERROR	PROGRESSIVE_RETRY
NO_SUCH_PROVIDER	NO_RETRY
CONNECTION_ERROR	PROGRESSIVE_RETRY
UNKNOWN_HOST	NO_RETRY
INTERNAL_ERROR	NO_RETRY

9.1.1.9 Working of Policies with Default Configuration

The following will be the result of applying the default configuration using the above policies.

- All the errors corresponding to "Default Retry" Policy should get retried immediately.
- All the errors corresponding to "No Retry" Policy will not get retired.
- All the errors corresponding to "Rate Limit Retry" Policy should get retried after 24 hours.
- All the errors corresponding to "Progressive Retry" Policy should get retried at intervals of 30 minutes, 1 hour, and 1.5 hours.

- Same can be verified from "s_message_send_info" and "failed_message_send_info".

9.1.1.10 Working of Policies with Customized Configuration

Perform the following steps.

1. Run the following query to customize the configuration.

   INSERT into media_profile_configuration(media_profile_id, contact_center_id, media_profile_type, media_profile_properties) VALUES ('<media_profile_id>,<contact_center_id>,'email', '{"maxRetryCount":"3", "rateLimitRetryTime":"86400", "progressiveRetryInterval":"300"}')

   Refer to the following table to know the definition of variables and their default value.

Variable	Definition	Default Value	Linked Policy
maxRetryCount	is the Maximum Count of Retry Attempts.	Its default value is 3.	Default Retry
rateLimitRetryTime	It is the retry late limit of the email server after which the email can be retried to send.	It's default value is 86,400 seconds that is 24 hours.	Rate Limit Retry
progressiveRetryInterval	It is the Progressive Retry Interval after which the email can be retried to send.	It's default value is 300 seconds.	Progressive Retry

2. Run the following CURL command to reload the configuration.

curl -X POST http://localhost:8888/ameyorestapi/media/messages/reloadMediaProfileConfiguration -H 'sessionId: <Administrator-session-id-only>'

The following will be the result of applying the customized configuration using the above policies.

- All the errors corresponding to "Default Retry" Policy should get retried immediately.
- All the errors corresponding to "No Retry" Policy will not get retired.
- All the errors corresponding to "Rate Limit Retry" Policy should get retried after configured time.
- All the errors corresponding to "Progressive Retry" Policy should get retried at intervals of configured time.
- Same can be verified from "s_message_send_info" and "failed_message_send_info".

9.2 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.

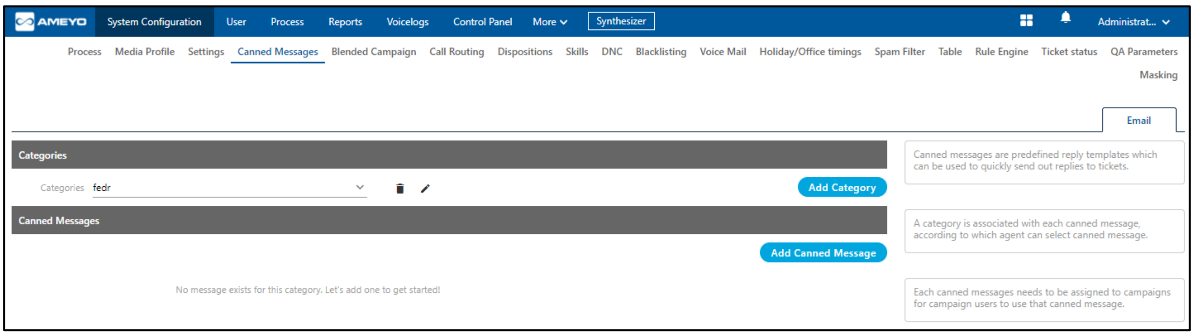


Figure: Canned Messages Tab

Here, you can perform the following functions.

9.2.1 Create Category

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

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

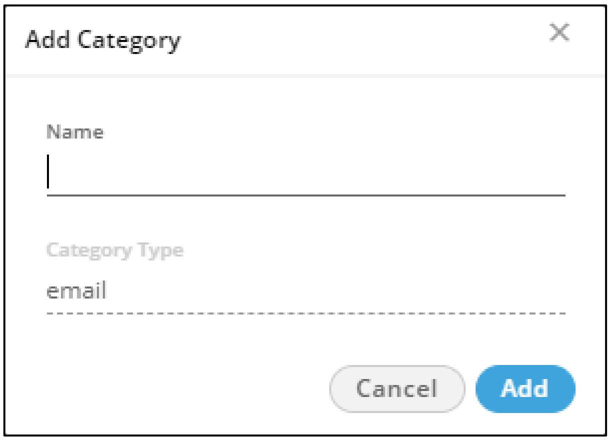


Figure: Add Category of Canned Messages

2. Provide a name for the category.

3. Click "Add". The category is created and listed in the drop-down menu.

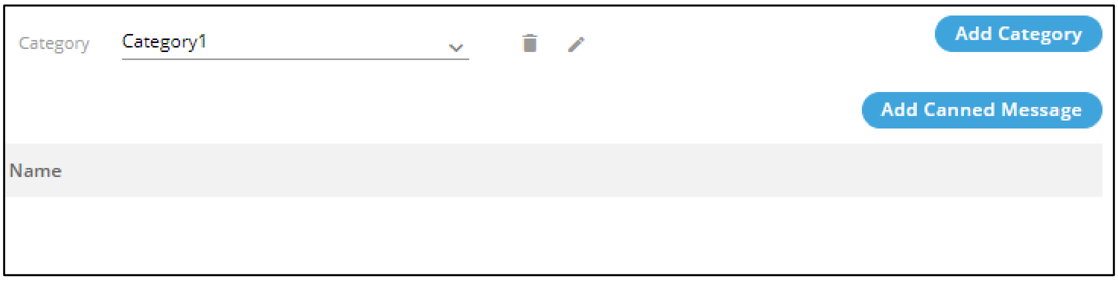


Figure: Added a Category of Canned Messages

You can create multiple categories. After creating category, the interface of this page will change.

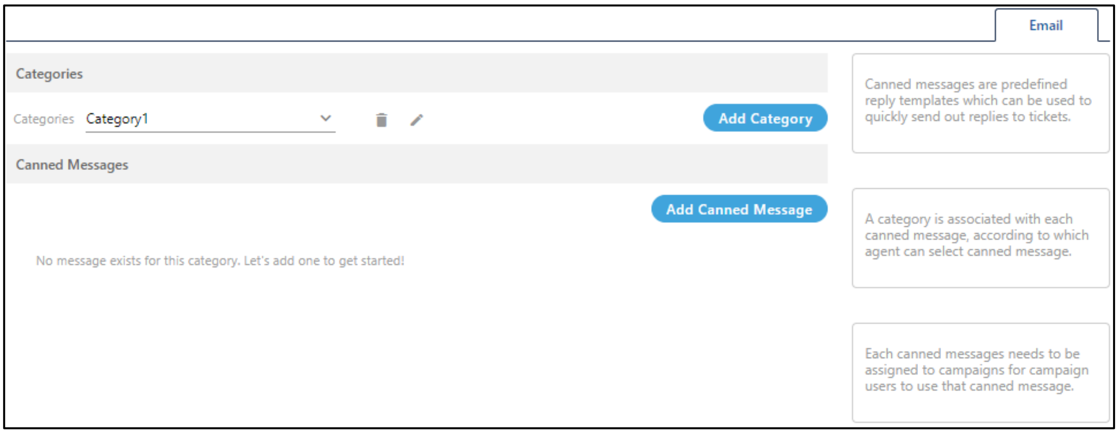


Figure: Categories of Canned Messages

9.2.2 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.

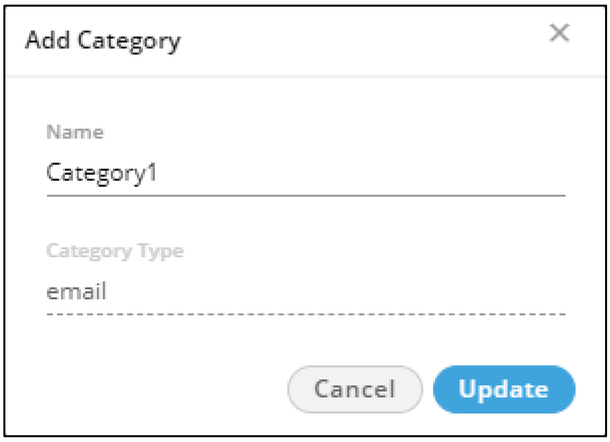


Figure: Modify a Category of Canned Messages

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.

9.2.3 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.

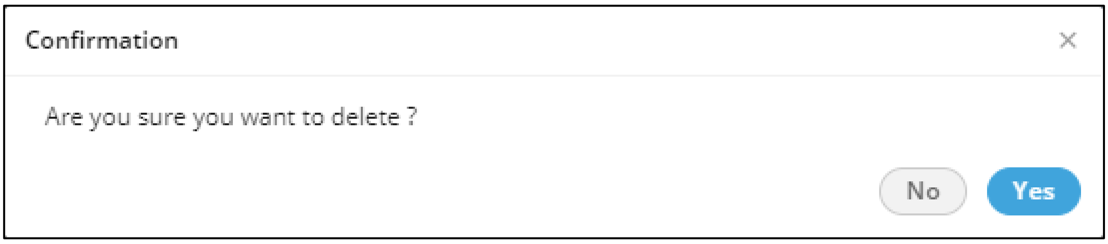


Figure: Asking to Delete a Category of Canned Messages

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

9.2.4 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.

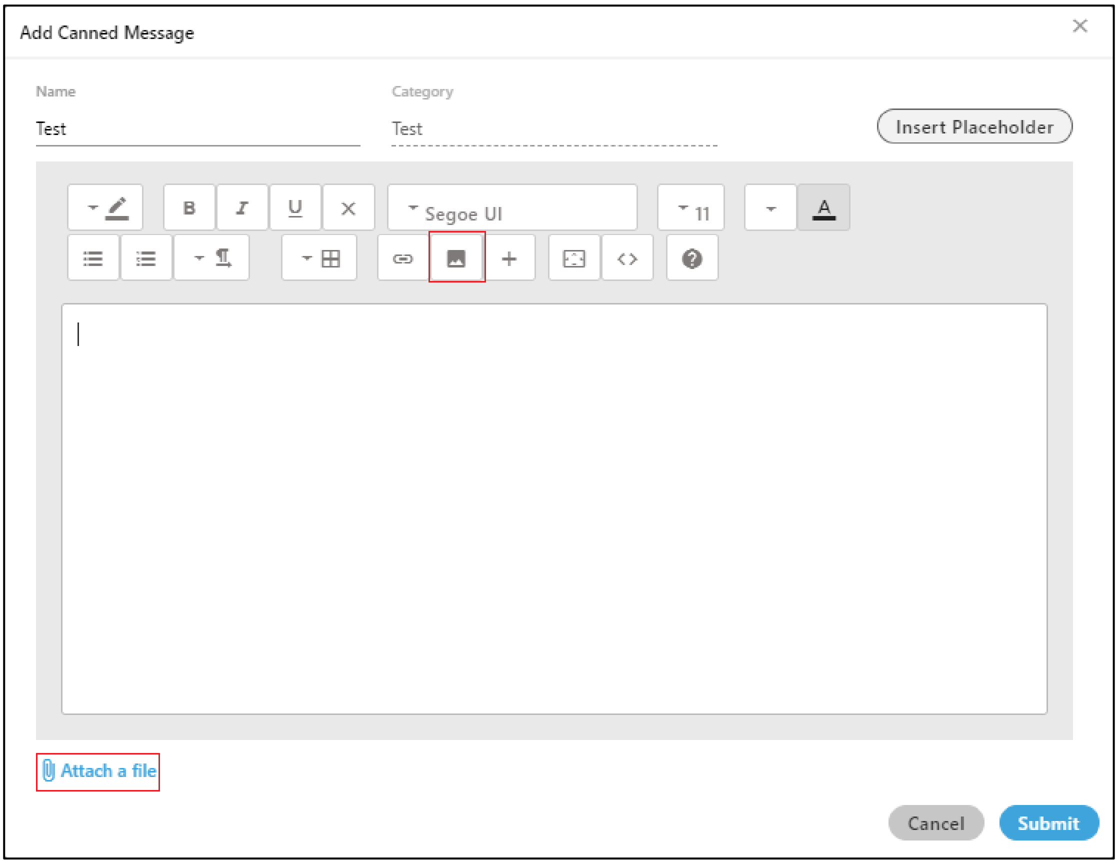
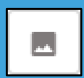


Figure: Add a Canned Message

The administrator can attach media files such as images through "Attach a file" option present here. Click  icon to insert inline images.

3. Provide a name of the canned message.
4. You can type the message in the text area.
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.

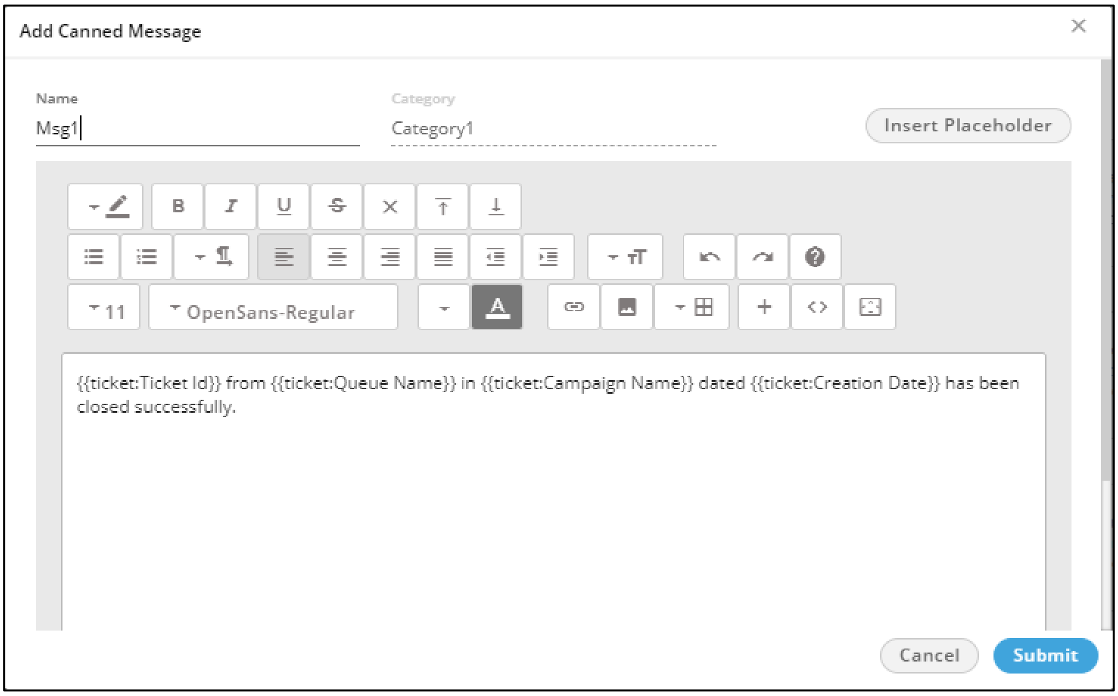


Figure: Sample Canned Message

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

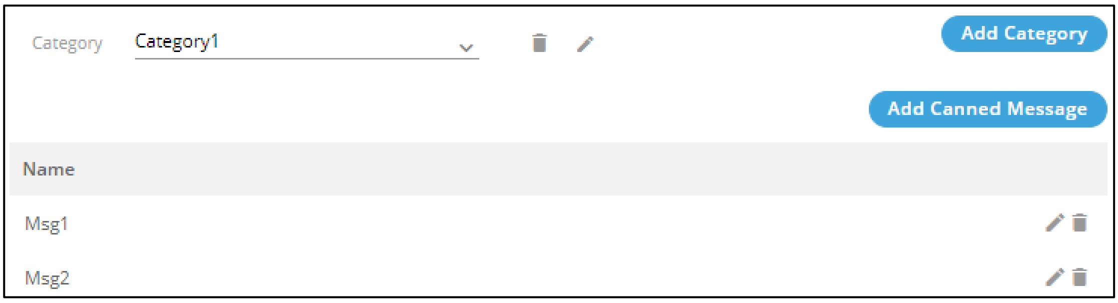


Figure: Added Canned Messages

9.2.4.1 Attachments

While creating or modifying the Canned Message, the Administrator can attach the files and insert inline images.

The administrator can attach media files such as images through "Attach a file" option present here. Click icon to insert inline images.

Supported File Types and Limitations for Attachments

Following file types are supported for attachments with Canned Message.

.doc, .docx, .xls, .xlsx, .ppt, .pptx, .xps, .pdf, .dxf, .ai, .psd, .psd, .eps, .ps, .svg, .ttf, .zip, .rar, .tar, .gzip, .mp3, .mpeg, .wav, .ogg, .jpeg, .jpg, .png, .gif, .bmp, .tif, .webm, .mpeg4, .3gpp, .mov, .avi, .mpegps, .wmv, .flv, .txt

One file can be attached at once. The maximum file size for all attachments in one Canned Message is 25 MB.

9.2.5 Modify a Canned Message

Perform the following steps to modify a Canned Message.

1. Click icon with for a canned message to modify it using the the following pop-up.

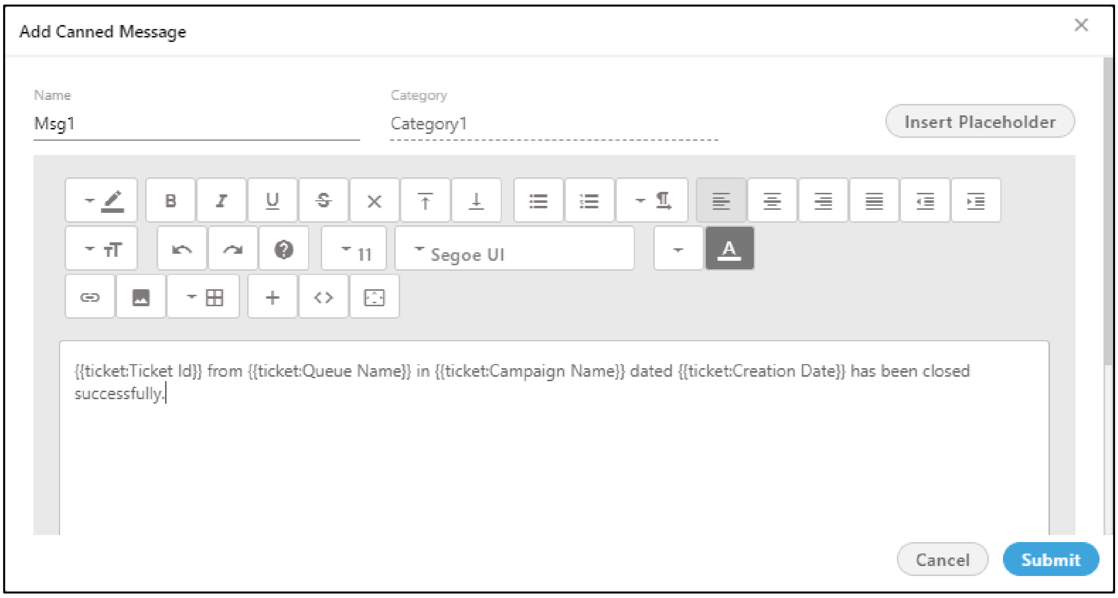


Figure: Modify a Canned Message

2. You can modify the name and content of the canned message.
3. You can click "Insert Placeholder" button to insert the placeholders.
4. You cannot change the category of an existing canned message, while modifying it. To change the category, you have to delete the canned message and create a new one.
5. Click "Save" to save the changes. Else, you can click "Cancel" to not save it.

9.2.6 Delete a Canned Message

Perform the following steps to delete a canned message.

If you delete a Canned Message, then the users would not be able to use it while performing their tasks. Also, there is no way to restore the deleted canned message.

1. Click icon for a canned message to delete it. The following warning message is displayed on the screen.

Figure: Warning while deleting a Canned Message

2. Click "Yes" to delete the selected canned message. Click "No" to not delete the Canned Message.

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

9.3 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.

9.4 Call 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.

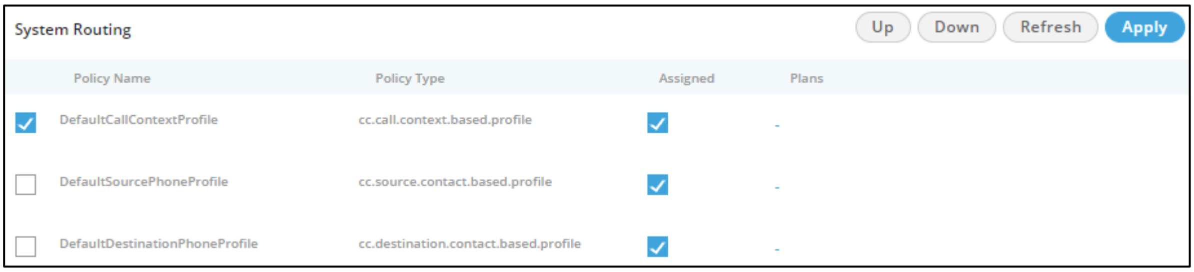


Figure: Routing Tab

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.

9.4.1 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.

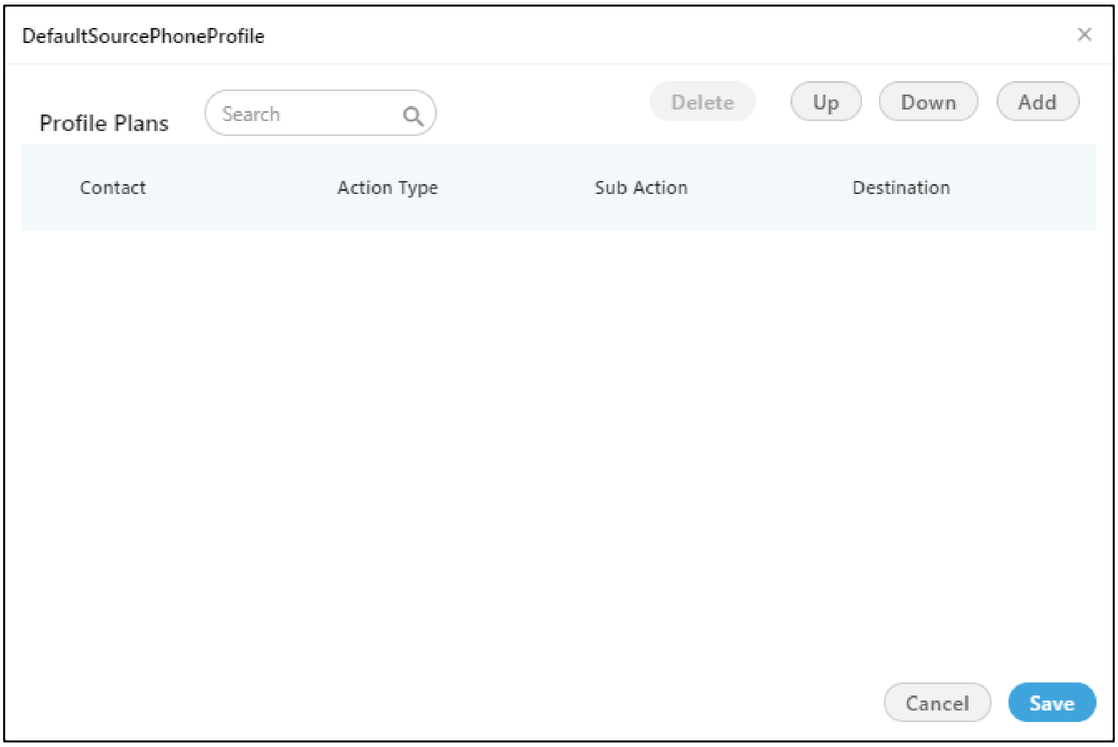


Figure: Blank Plan for DefaultSourcePhoneProfile

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

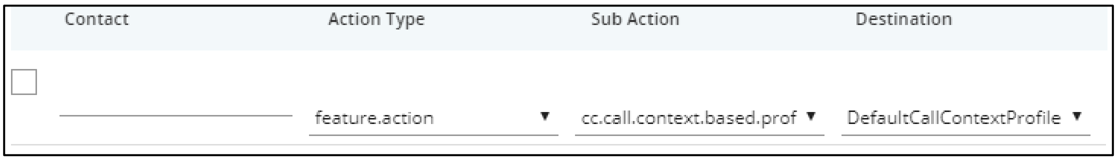


Figure: Blank Raw for DefaultSourcePhoneProfile and DefaultDestinationPhone Profile

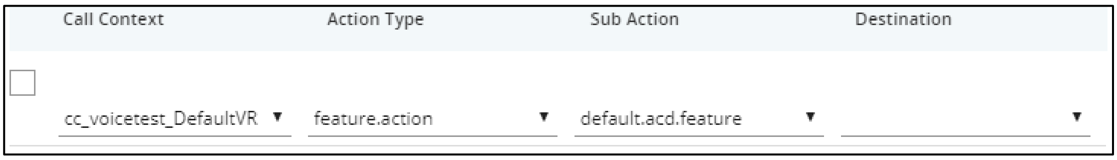


Figure: Blank Raw for CallContextProfile and DefaultDestinationPhone Profile

4. **<u>Call Context</u>:** 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

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

5. **<u>ActionType</u>:** 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. <u>cc.call.context.based.profile</u>: 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.

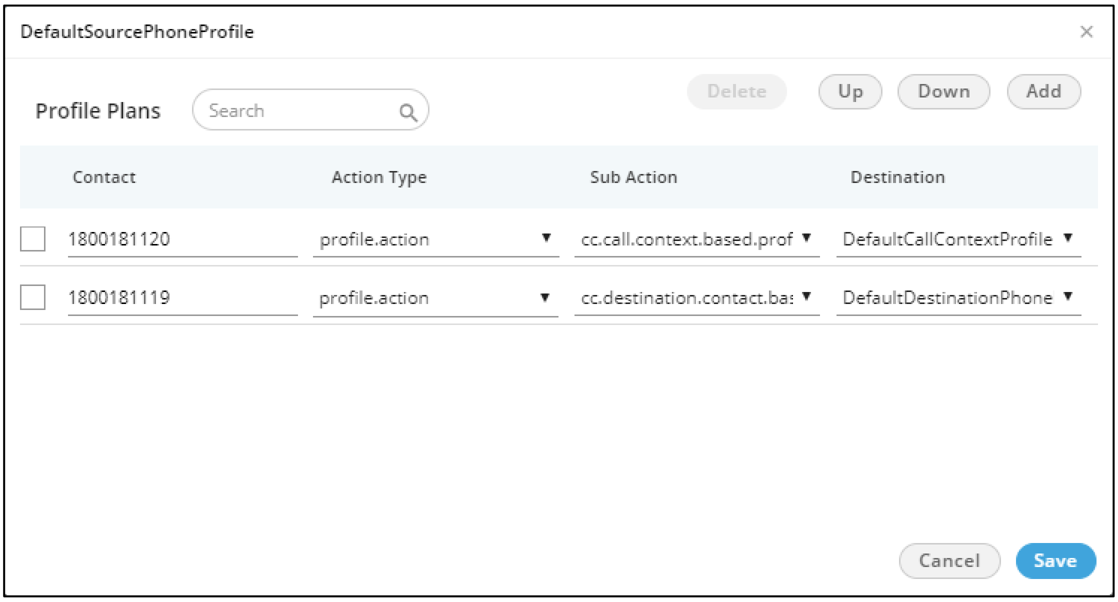


Figure: Adding Plan for DefaultSourcePhoneProfile

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.

9.5 Dispositions

It contains two sub-tabs - Disposition Class and Disposition Plan.

9.5.1 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.

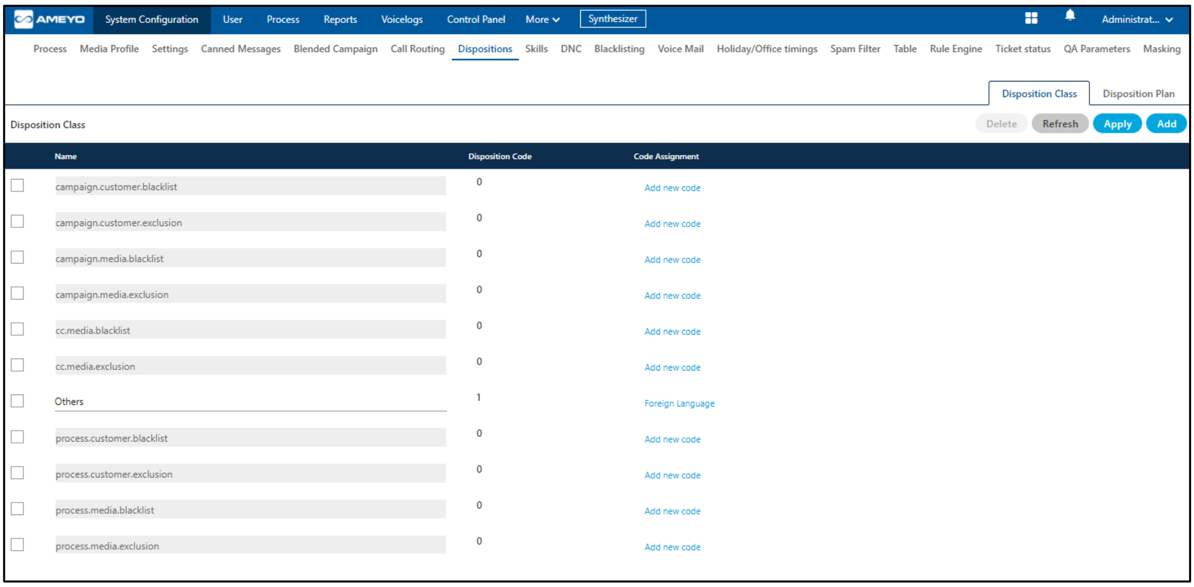


Figure: Disposition Class

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.

9.5.2 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.

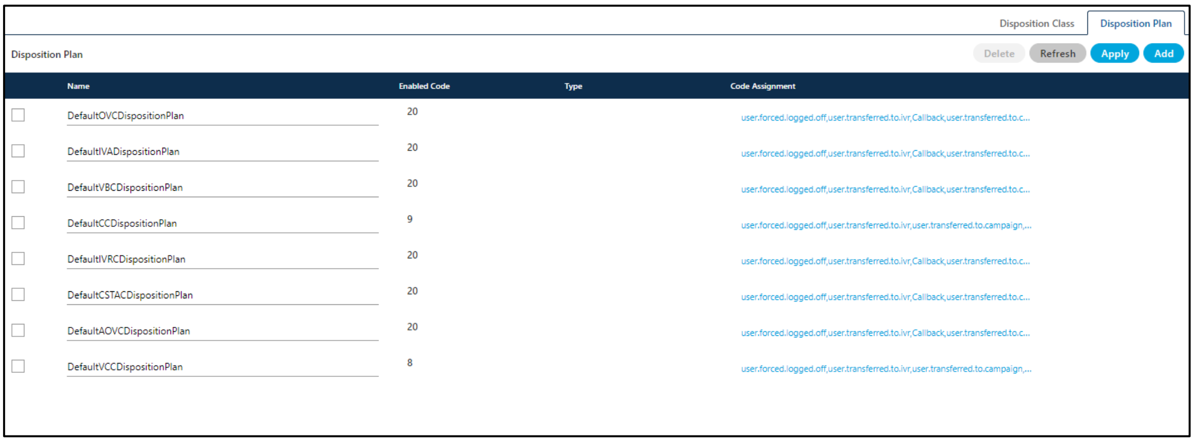


Figure: Disposition Plans

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.

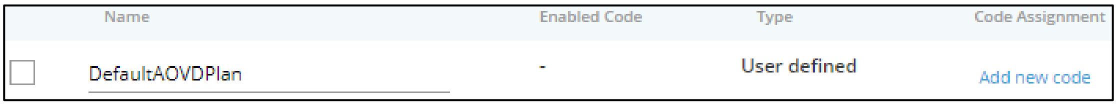


Figure: Adding New Disposition Plan

"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.

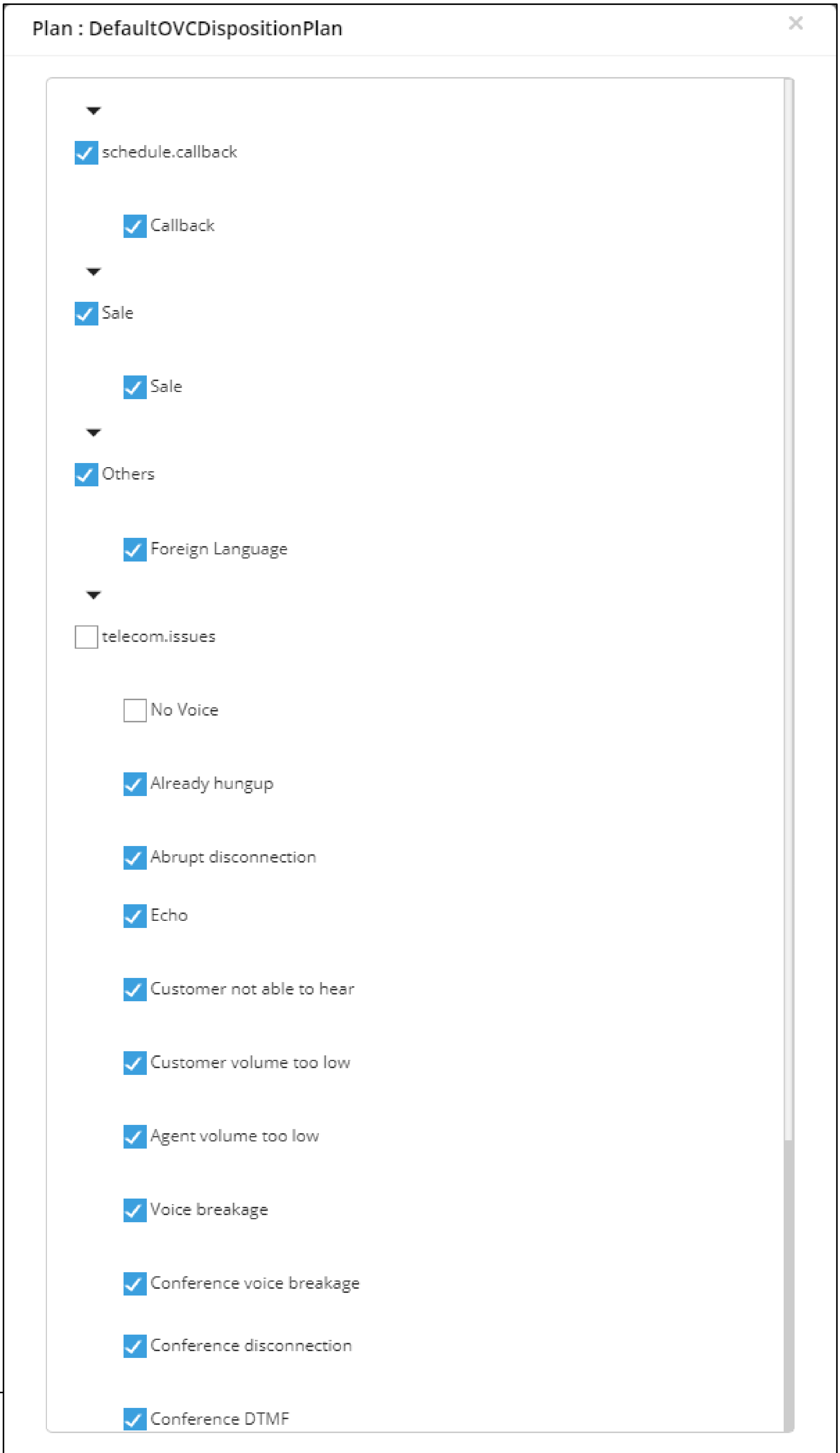

Plan : DefaultOVCDispositionPlan
schedule.callback
Callback
Sale
Sale
Others
Foreign Language
telecom.issues
No Voice
Already hungup
Abrupt disconnection
Echo
Customer not able to hear
Customer volume too low
Agent volume too low
Voice breakage
Conference voice breakage
Conference disconnection
Conference DTMF

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 the **"Refresh"** button to discard the changes.

9.5.3 Disposition Options for Ameyo Users

Ameyo offers the following options of dispositions for the Users.

1. **Two Level Disposition:** It means that the user can select the disposition in the hierarchical way. The user has to select the Disposition Class first and then select "Disposition Code".

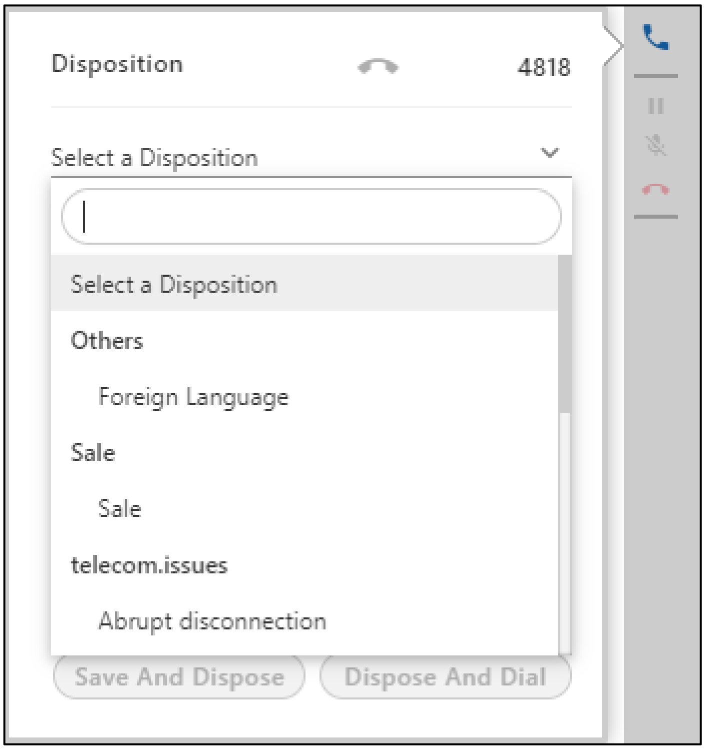


Figure: Two level Disposition Selection

Two-level Disposition has been made default. However, the businesses can still perform the backend configuration to make "one-level" disposition as default.

2. **One-level Disposition:** It means that the user can select the disposition in the simple way, that is, the selection of the disposition is in the simple way and all the nested dispositions come in a single hierarchy(one after another). In this feature, the user can select only the main disposition but not the sub disposition.

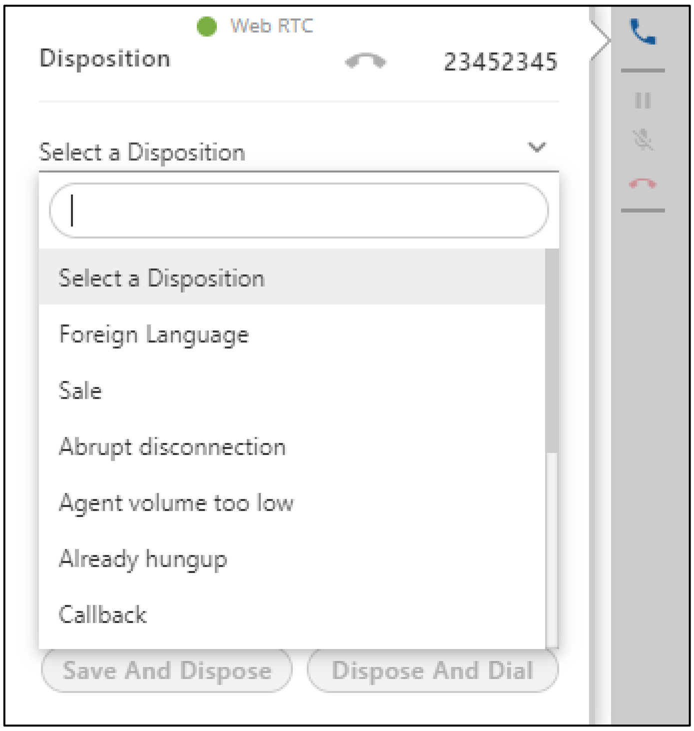


Figure: One-level Disposition

9.5.3.1 Enable One-level Disposition (If Required)

Disable the two-level disposition to enable the one-level disposition. Perform the following steps.

A. Execute the following command to login to the PostgreSQL Console and access the database.

psql -U postgres ameyodb

B. Run the following query to disable the two-level disposition and enable the one-level disposition.

INSERT INTO server_preference_store (context_type,context_id,key,value) VALUES ('campaign','<campaign_id>','showTwoLevelDisposition','false');

C. Run the following query to exit from the database.

\q

For the definitions of Dispositions and the Call Types, click here.

9.6 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.

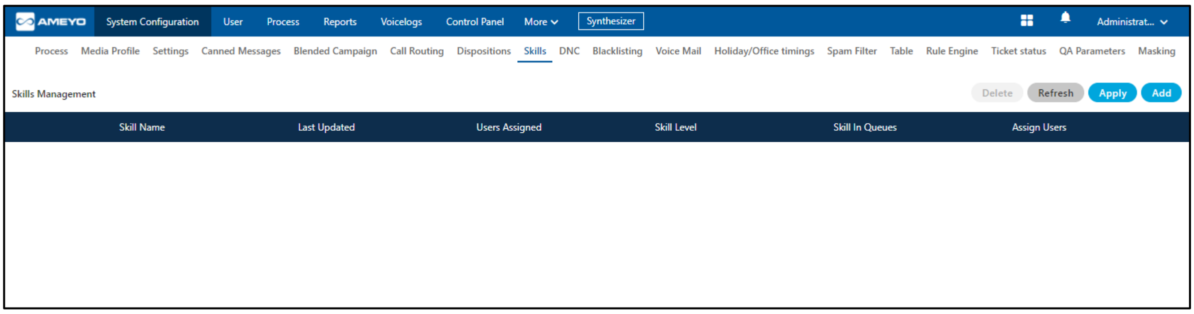


Figure: Skills Tab

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, 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.

9.6.1 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.

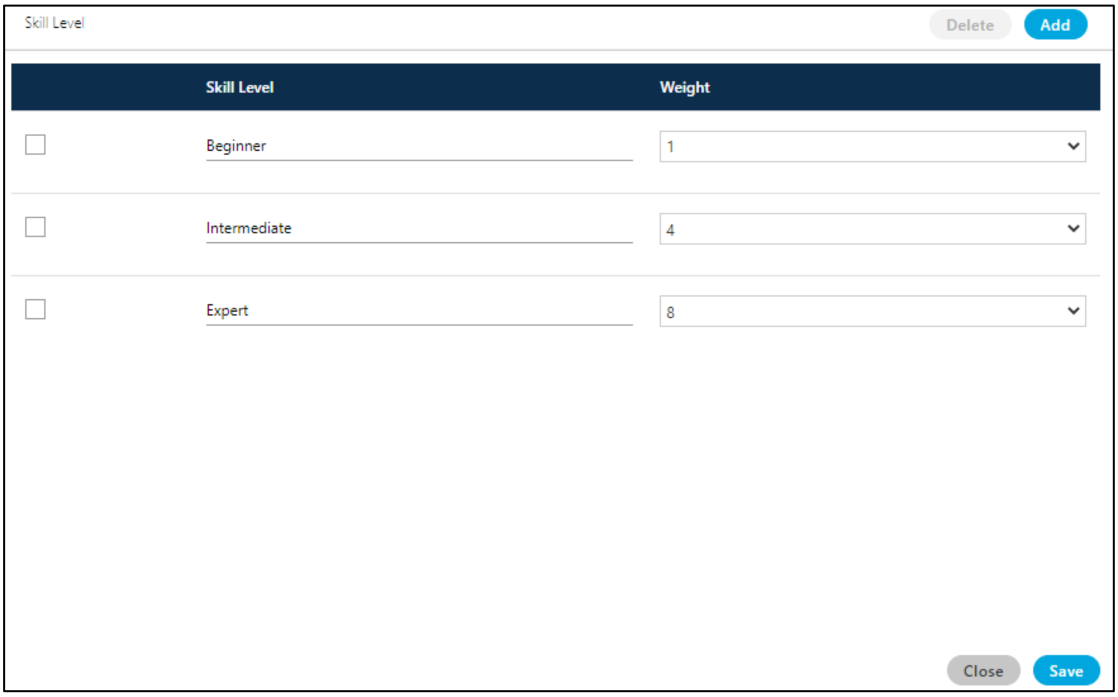


Figure: Adding Skill Levels

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.

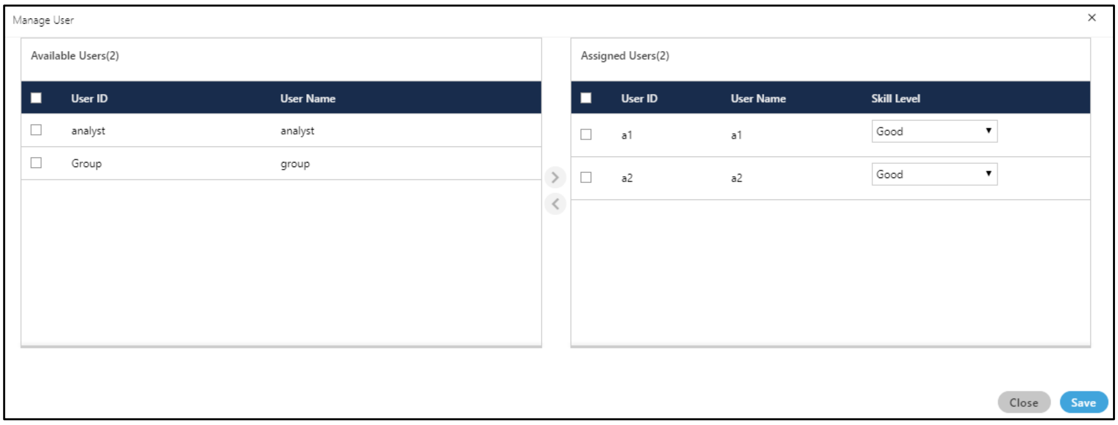


Figure: Manage Users

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.

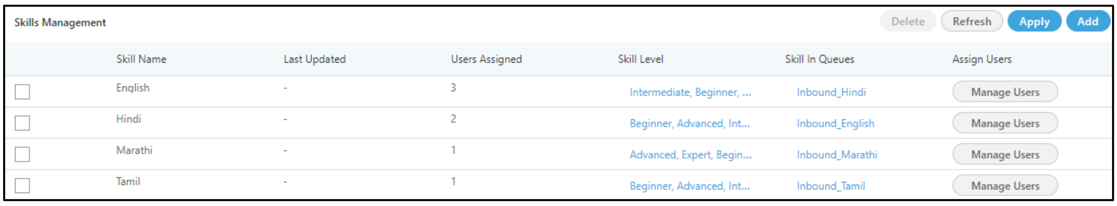


Figure: Added Skills

4. The skills can be assigned to the queue while editing it in the settings of any campaign. Here, "Skill in Queue" column shows the list of queues where a skill has been assigned. Click the link in "Skill in Queues" column to see the list of queues in which it has been assigned.

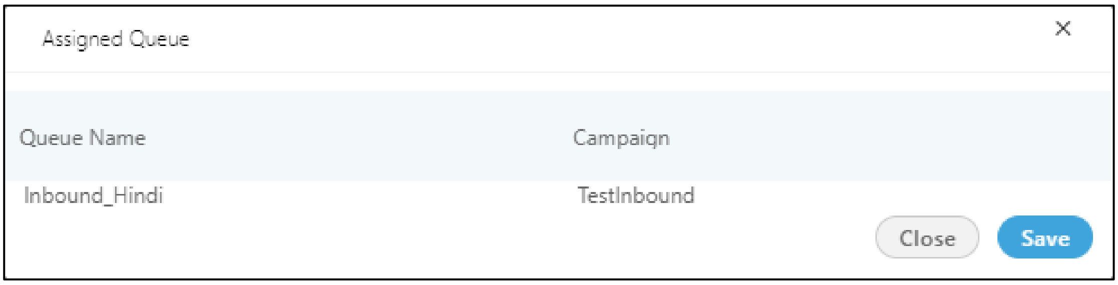


Figure: List of Queues

5. Click **"Apply"** to apply the changes.

   Rather, you can click "Refresh" to discard the changes. You can add multiple skills here.

9.6.2 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 it.

Figure: Delete the Skill

Once the skill is created, it cannot be edited, it only can be deleted. If the user has to edit the skill, then administrator can do this by deleting it and creating a new one.
On the other hand, the administrator has the right to manage the users and assigning or unassigning the new skill levels to the existing skill.

9.7 DNC

If administrator wants to exclude few numbers that should not be dialed in the system, then they can be uploaded in DNC tab by adding leads. Adding numbers at the system level will apply DNC on those numbers at tenant level. They will not dial through any of the campaign or queues created under that tenant from Auto-Dial.

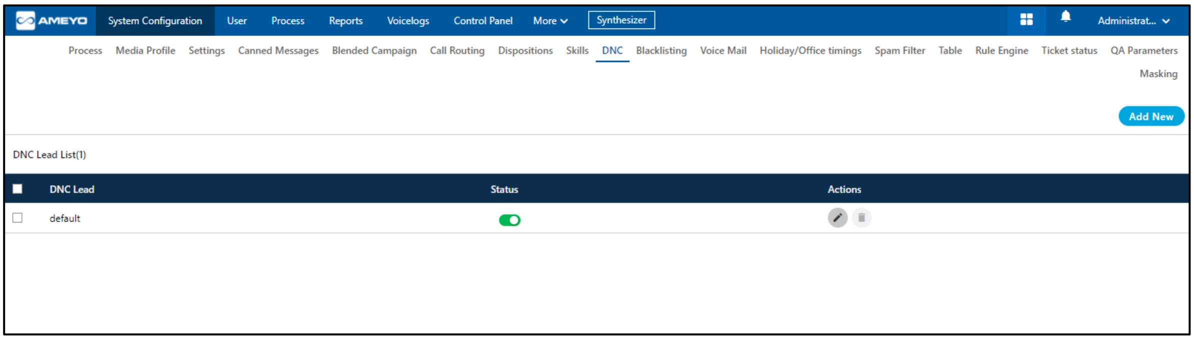


Figure: DNC Tab

9.7.1 Create DNC List

Administrator can perform the following steps to create a DNC List.

1. Click "Add New" button to create a new DNC lead. It shows the following modal.

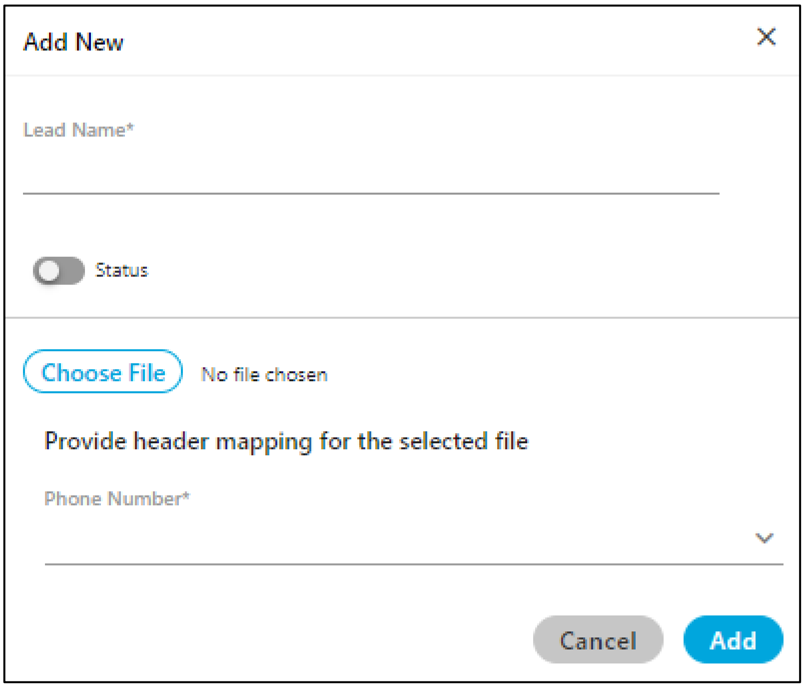


Figure: Add New DNC Lead

Here, you have to perform the following steps.

A. In Lead Name column, enter the name of the lead.

B. Toggle Status button to enable the new lead.

C. Click "Choose 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 as per the created headers in the system.

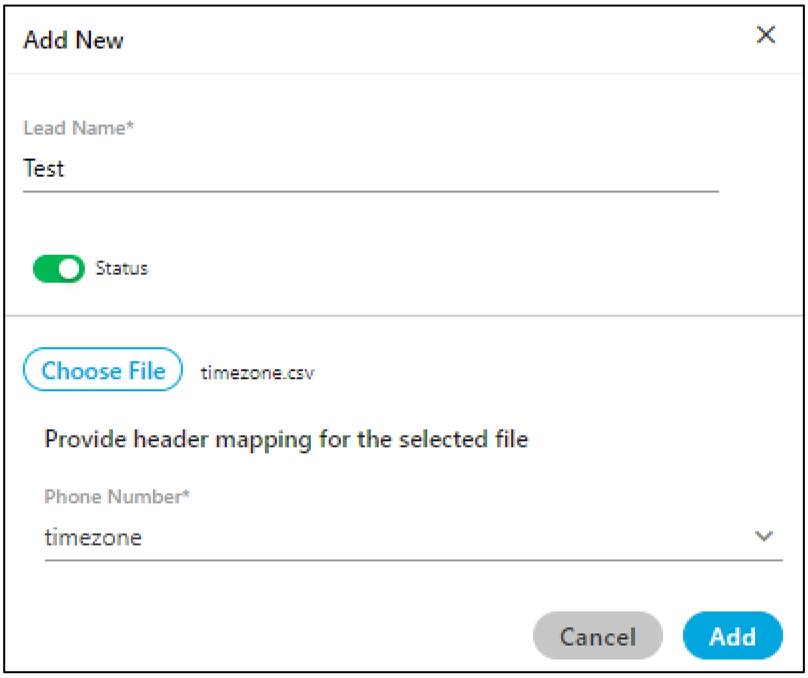


Figure: Sample DNC Lead

E. Click "ADD" to save the changes.

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

2. After clicking "ADD", a result modal is shown that provides the overview of the uploaded contacts through the DNC lead.

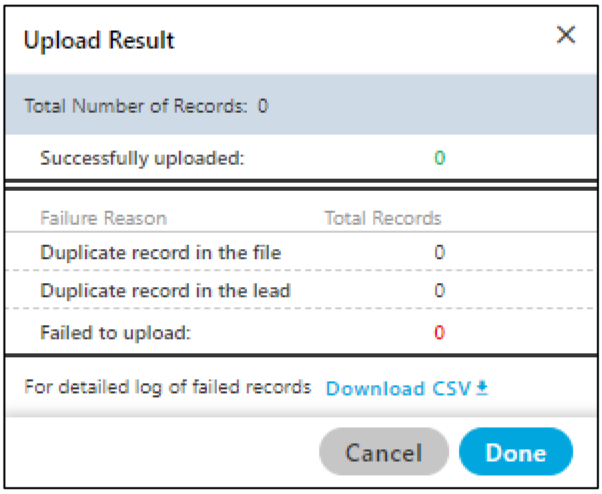


Figure: Upload Result Modal

3. The administrator can click "Download CSV" option to download the CSV file of the contacts that have been failed while uploading.
4. The administrator can use the above steps to upload multiple DNC leads here.

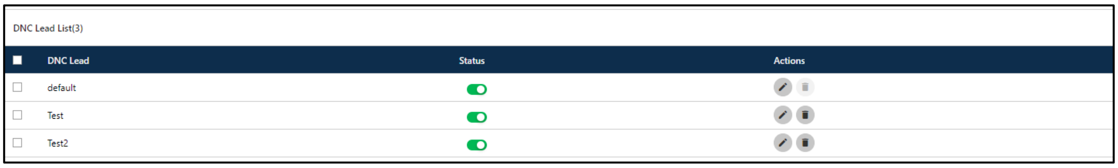


Figure: Upload Result Modal

9.7.2 Edit a DNC Lead List

Select the DNC Lead which you want to edit and click  icon. The same modal is arrived which is arrived at the time of adding the DNC. You can change the DNC lead name, file and header mapping on the opened modal. You can also enable or disable the lead from here as well.

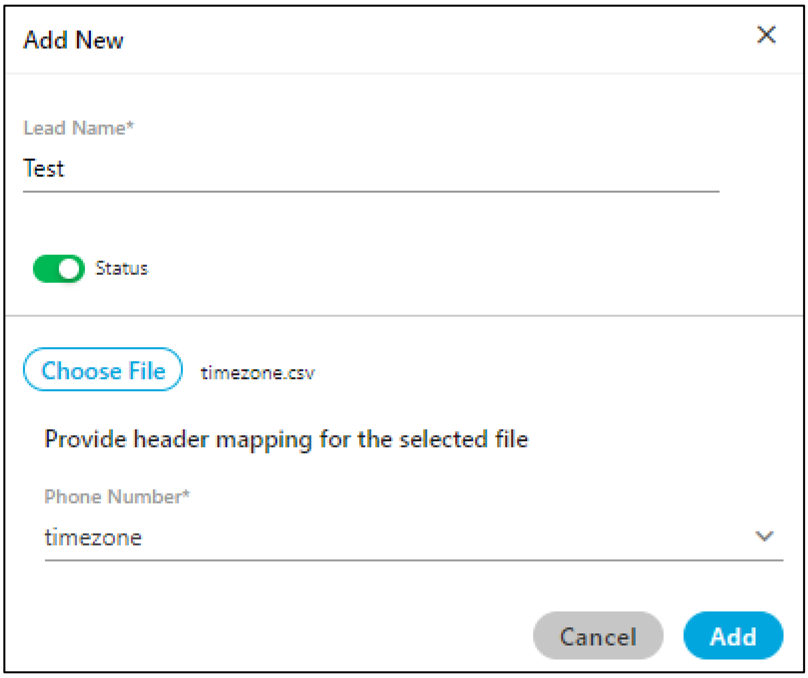


Figure: Edit DNC Lead

9.7.3 Delete an DNC Lead List

The deleted DNC lead cannot be retrieved back.

Select the DNC Lead and click icon to delete it. A warning message is displayed on screen. Click "Yes" to delete it else you can click "No" to not delete it.

Figure: Delete DNC Lead

9.8 Blacklisting

Sometimes, customers misuse or abuse the users of the organization. Some of the customers also call repeatedly to the users, which hampers the working of the users. In such cases, the Administrator is able to blacklist the incoming calls of the customers. The contacts that have been added to the blacklist lead are not able to call the contact center. The organization can decide how to handle such customers differently.

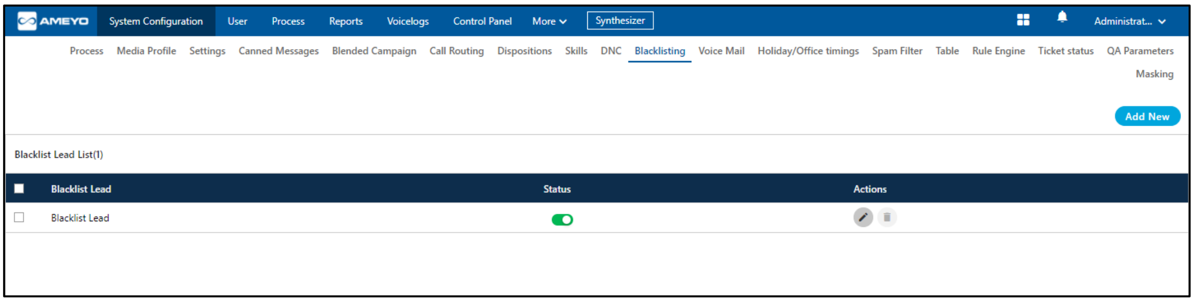


Figure: Blacklisting Tab

9.8.1 Add a new Blacklist Lead

Administrator can perform the following steps to add a new Blacklist lead.

1. Click "Add New" button to create a new Blacklist lead. It shows the following modal.

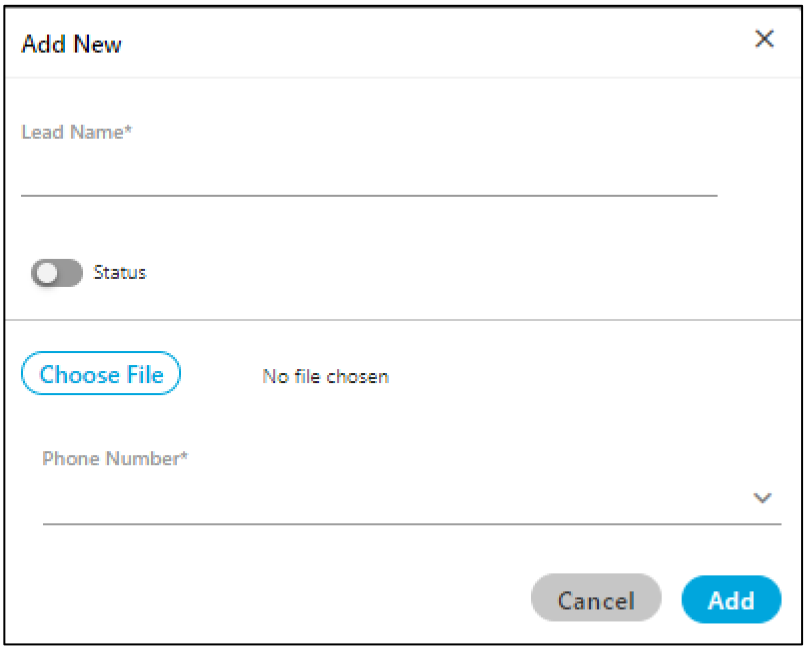


Figure: Add New Blacklist Lead

Here, you have to provide the following information.

A. In Lead Name column, enter the name of the lead.

B. Toggle Status button to enable or disable the new lead.

C. Click "Choose File" to select the location and the CSV file. Click "Open" button to upload that file.

D. In Header Mapping, the administrator can map the file headers of lead with phone, timezone, and name headers as per the created headers in the system.

Figure: Sample Blacklist Lead

E. Click "ADD" to add a new lead.

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

2. After clicking "ADD", a result modal is shown that provides the overview of the uploaded contacts through the Blacklist lead.

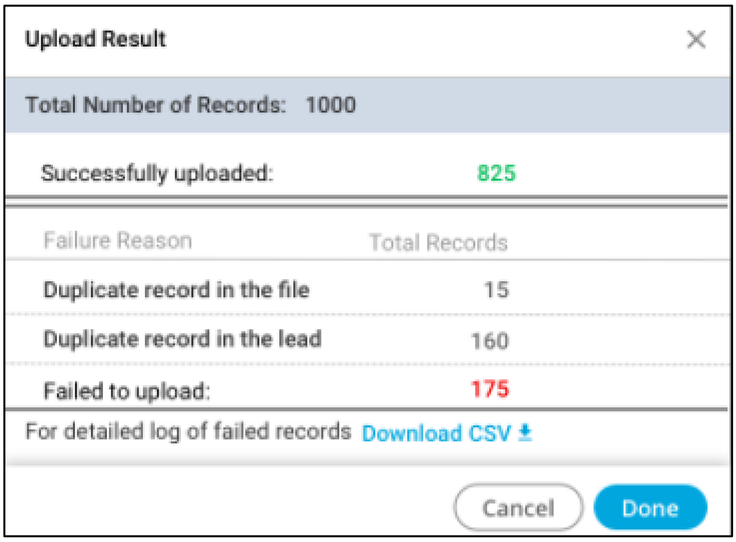


Figure: Upload Result Modal

3. The administrator can click "Download CSV" option to download the CSV file of the contacts that have been failed while uploading.
4. The administrator can use the above steps to upload multiple Blacklist leads here.

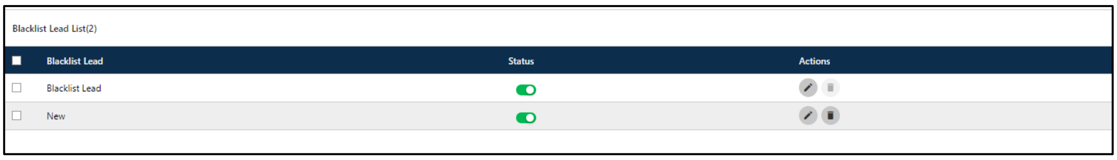


Figure: Upload Result Modal

9.8.2 Edit Blacklist Lead

Select the Blacklist Lead which you want to edit and click icon. The same modal is arrived which is arrived at the time of adding the Blacklist. You can change the Blacklist lead name, file and header mapping on the opened modal. You can also enable or disable the lead from here as well.

Figure: Edit Blacklist Lead

9.8.3 Delete an Blacklist Lead List

The deleted Blacklist lead cannot be retrieved back.

Select the Blacklist Lead and click icon to delete it. A warning message is displayed on screen. Click "Yes" to delete it else you can click "No" to not delete it.

Figure: Delete Blacklist Lead

9.9 Voice Mail (Licensed Feature)

Voice Mail is a method of storing voice messages electronically for later retrieval by administrator and supervisor.

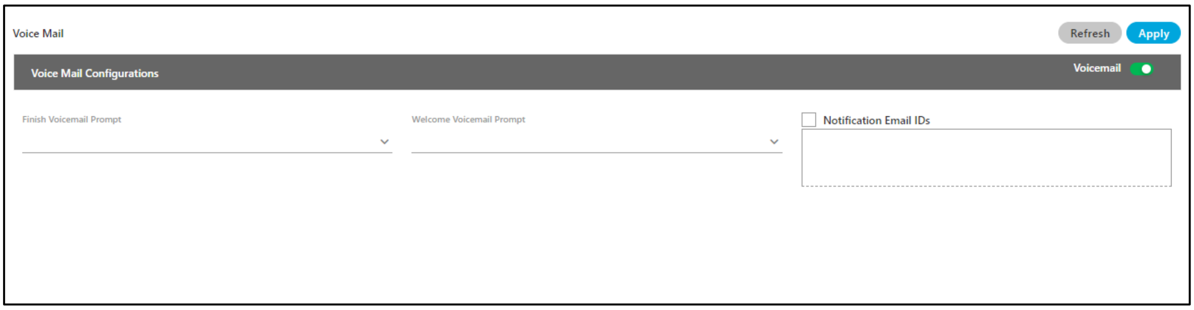


Figure: Voicemail

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, the 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 a 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 the **"Apply"** button to save the changes.
   Rather, you can click **"Refresh"** to discard the changes.

9.10 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.

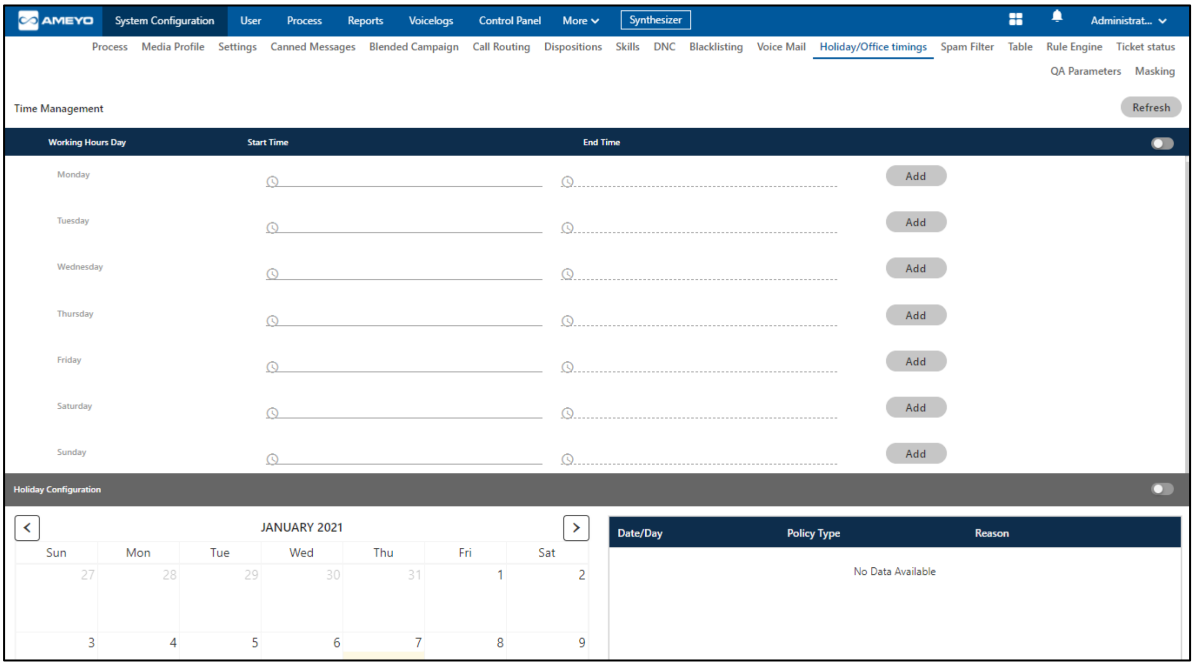


Figure: Holiday/Office Timings Tab

9.10.1 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.

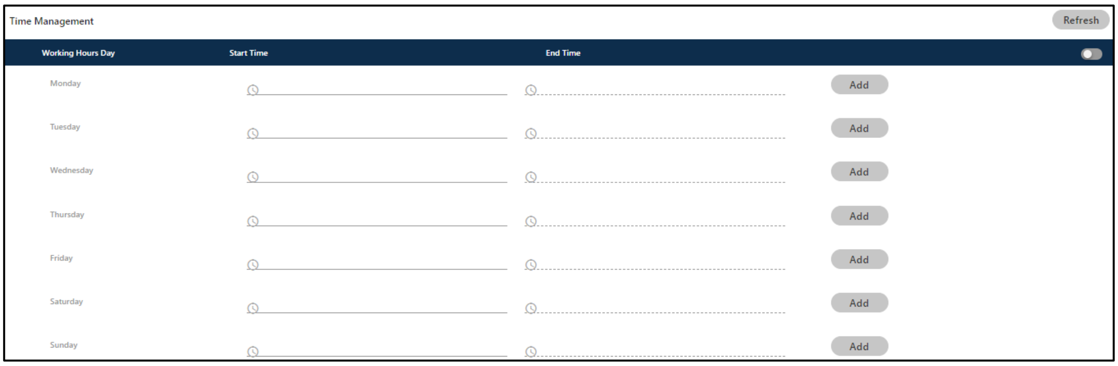


Figure: Define Working Hours

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.

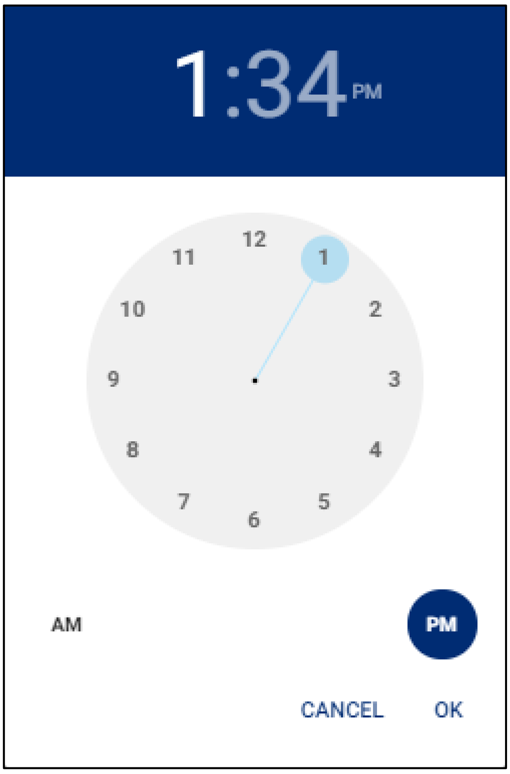


Figure: Select Time

3. You can click hour in header to use the clock to select the hour.
4. You can click minute in the header to use the clock to select the minutes.
5. You can click "PM" or "AM" in the header to change their values.
6. Once done, click "OK" to save the time. Similarly, you have to select "End Time".

7. Click "Add" to add the working duration for the particular day.

   Similarly, you can provide the working hours for all seven days as displayed in the following screenshot.

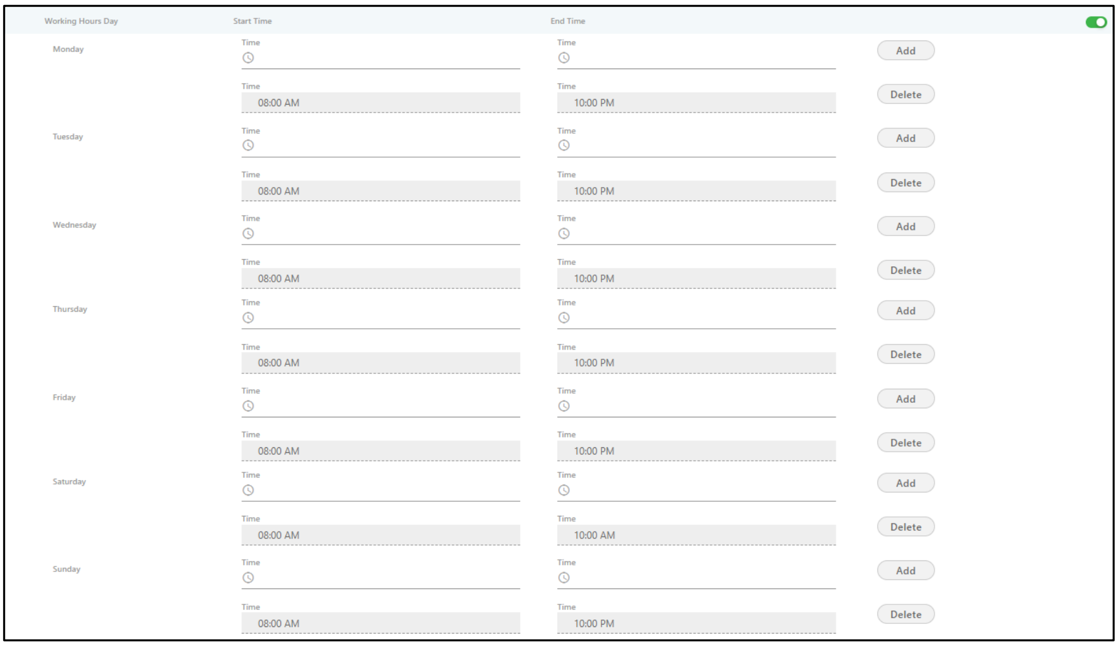


Figure: Defined Working Hours

To delete the working hour for a day, click "Delete" for that row.

9.10.2 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.

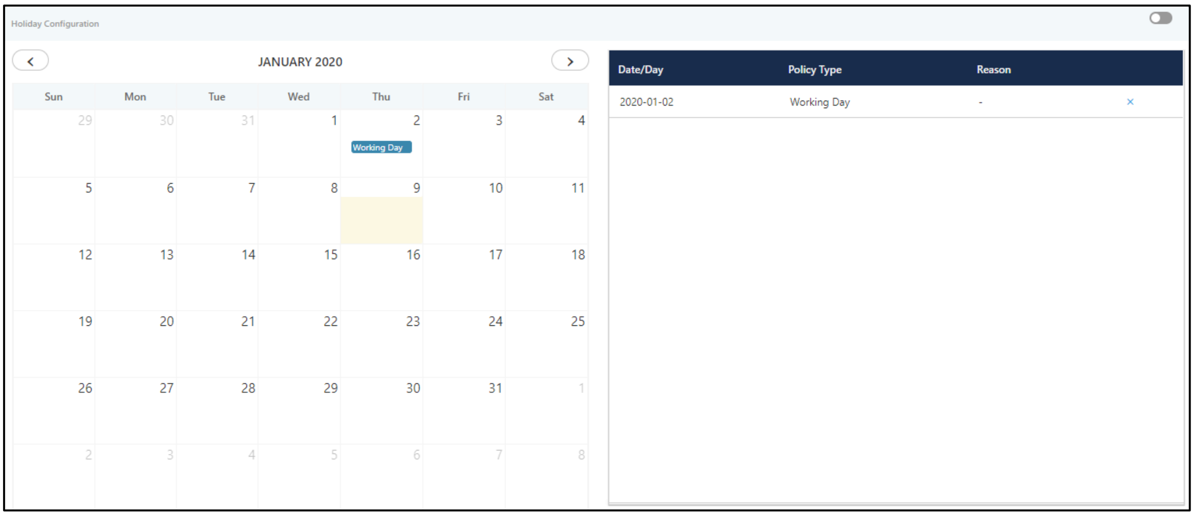


Figure: Holiday Configuration

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.

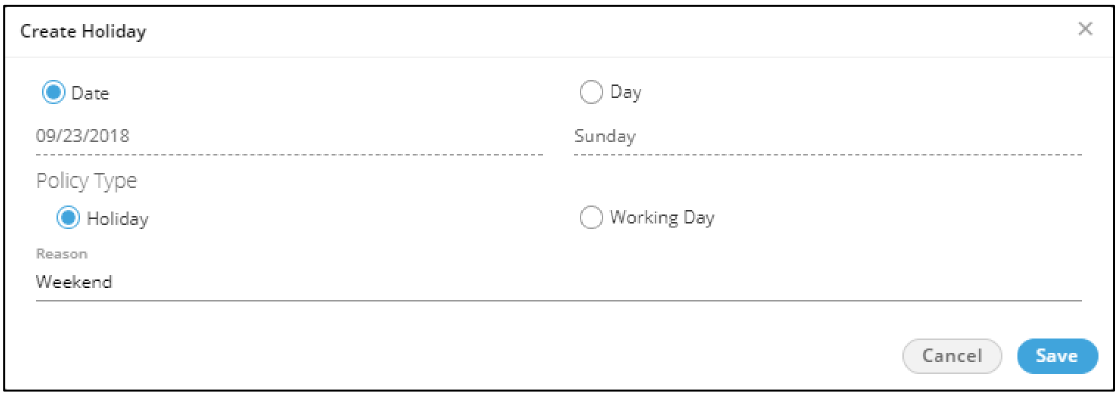


Figure: Create Holiday or Working Day

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.

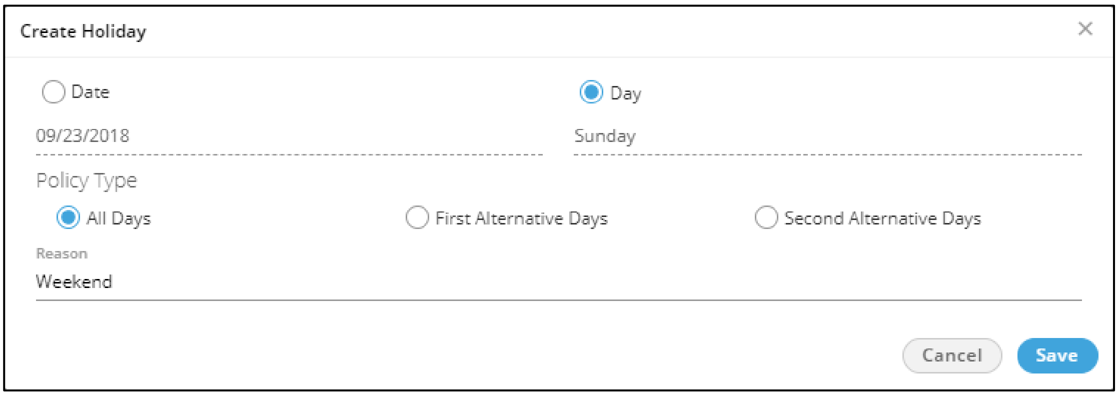


Figure: Create Reoccurring Holidays

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 means 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 the 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 on the right side section.

Following is a sample screenshot.

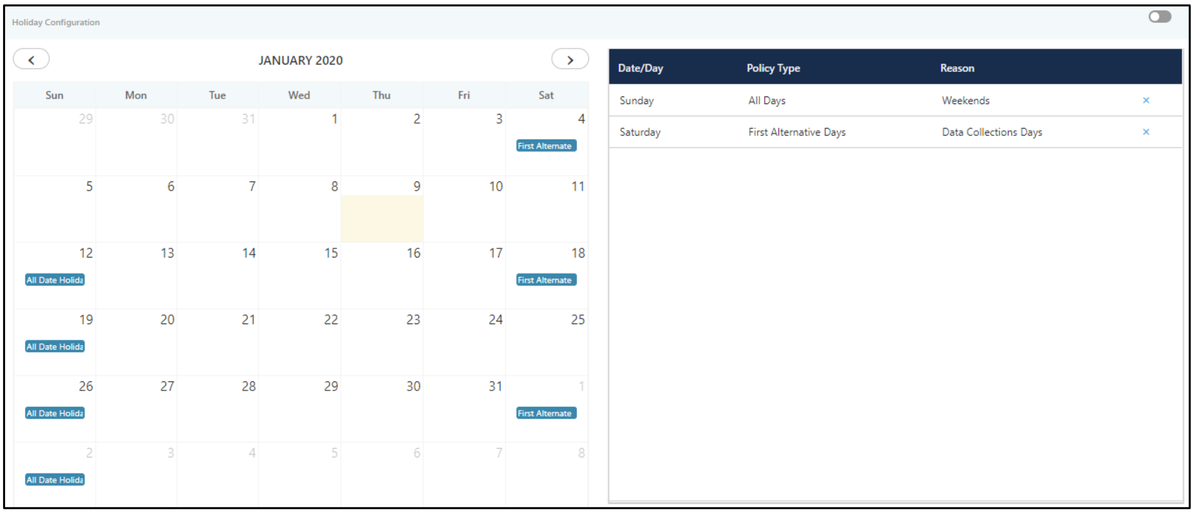


Figure: Created the holidays

To delete a holiday, click "X" for a holiday in the right side section.

9.11 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 containing the specified keywords in subject, sender, or message body.

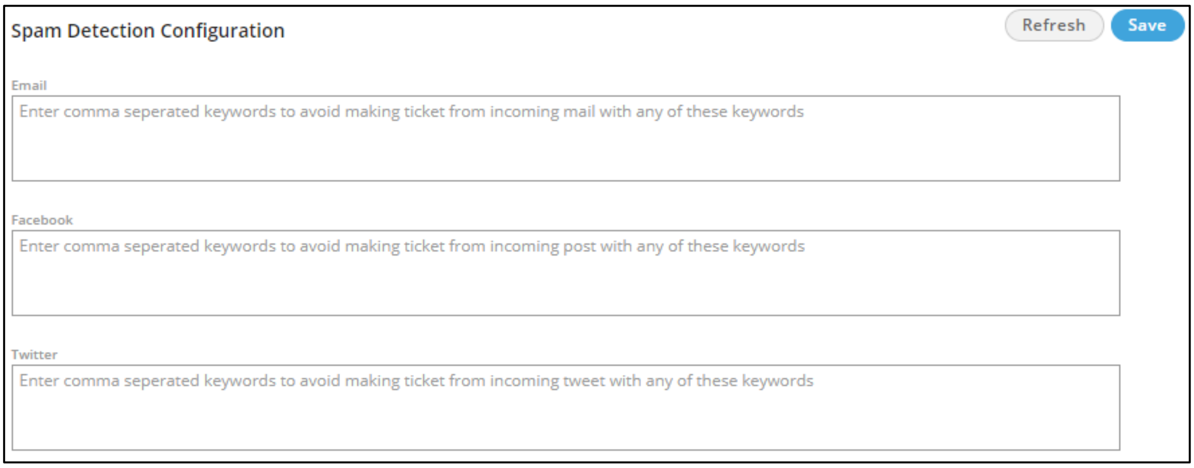


Figure: Spam Filter Tab

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

9.12 Rule Engine

9.12.1 Rule Engine Tab

The Rule Engine allows you to create the different kinds of rules that runs automatically.

Figure: Rule Engine Tab

Click the following rules to know about the different types of rules.

1. **Routing Rules**

   Click the following link to know more about the HTTP Action used in Routing Rules, Event-based Rules, and Timer-based Rules.

   - HTTP Action

2. **Event-based Rules**
3. **Timer-based Rules**

9.12.2 Routing Rule

9.12.2.1 Routing Rules

"Routing" Tab in "Rule Engine" 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.

9.12.2.1.1 Add a Rule

Perform the following steps to add a rule.

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

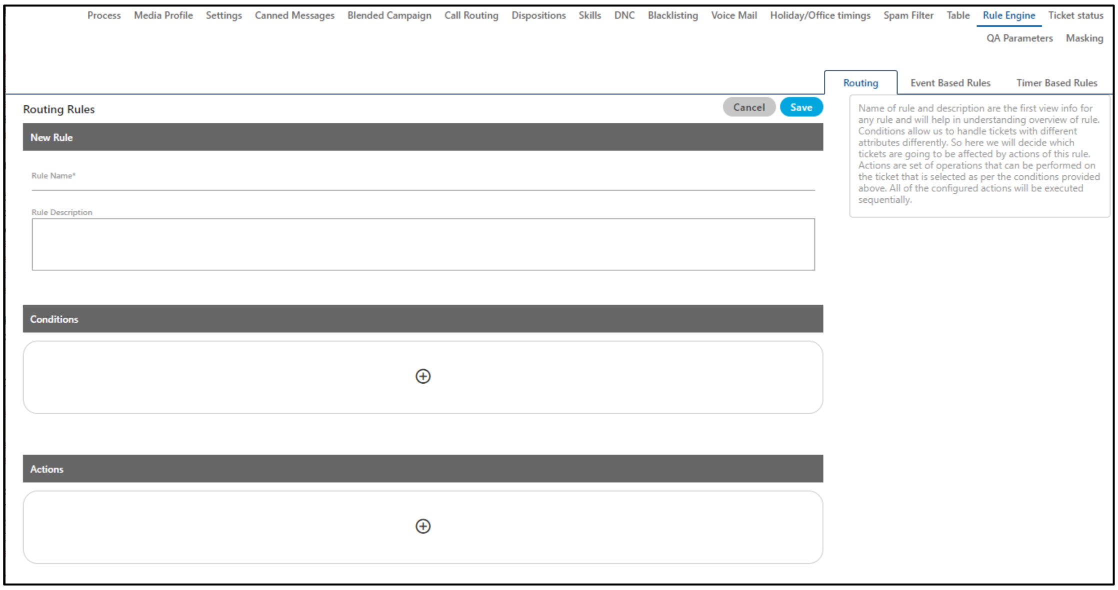


Figure: Adding a Rule

2. **<u>Rule Name</u>:** Provide a name for your rule.

3. **<u>Rule Description</u>:** Provide a description for your rule.

4. **<u>Conditions</u>:** Here, you can specify the conditions based upon which the system-rules-add-condition-to actions will be taken. Perform the following steps.

   A. Click icon in the middle of the "Condition" box to add a new condition. It shows the following section.

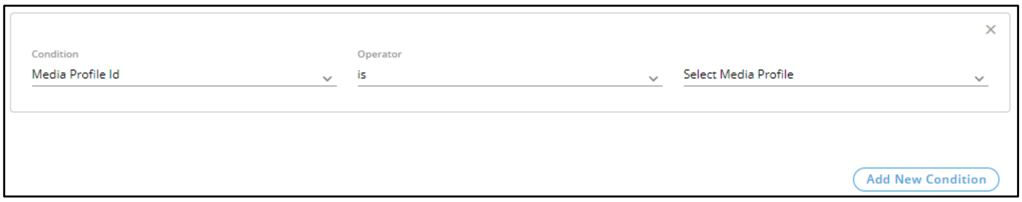


Figure: Add a Condition

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.

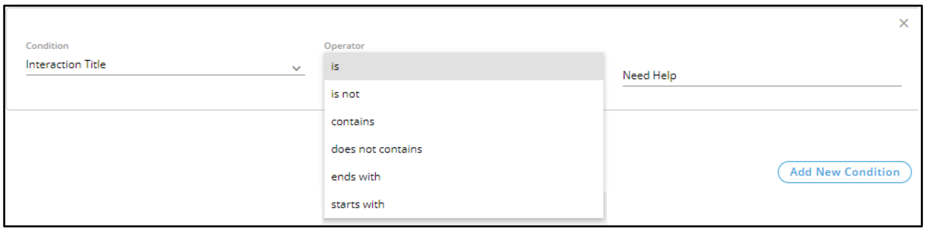


Figure: Interaction Title Condition

- 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

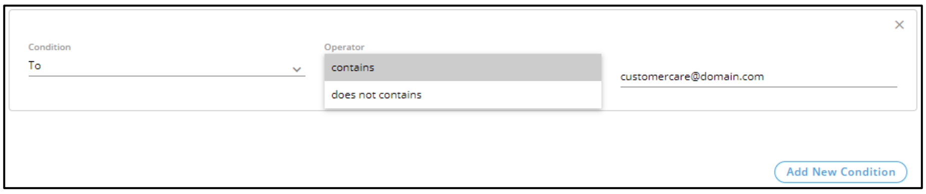


Figure: "To" Condition

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

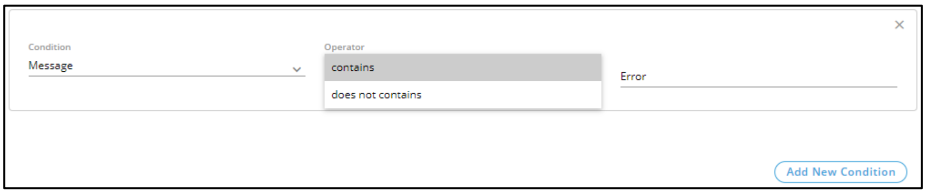


Figure: Message Condition

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

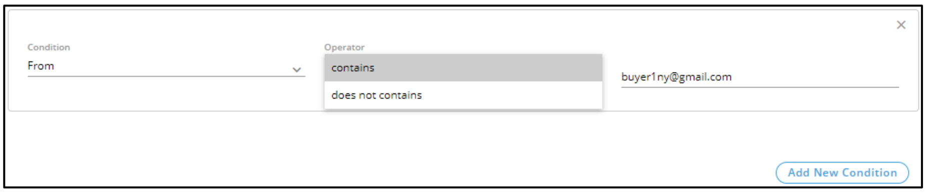


Figure: From Condition

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

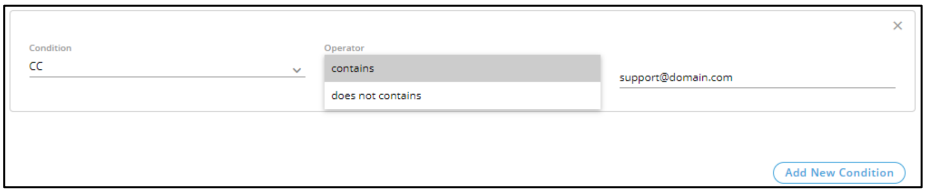
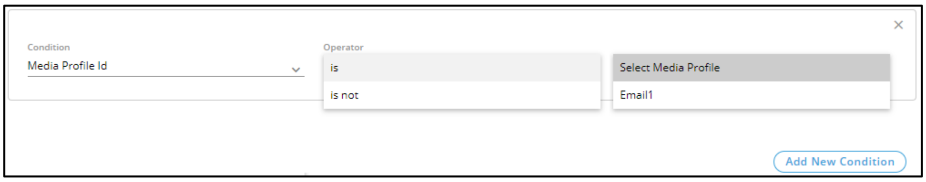


Figure: "CC" Condition

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



system-rules-disable-view

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.

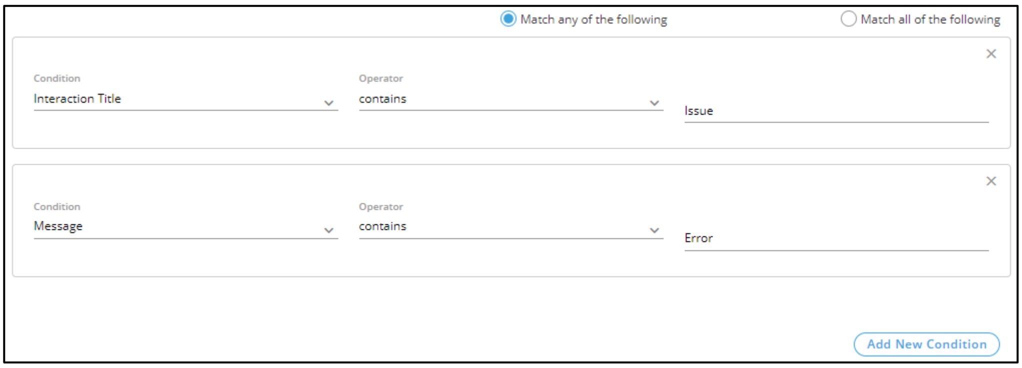


Figure: Multiple Conditions

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

3.

A.

- **Match any of the following:** Select this option to match any of the conditions. The ticket will be routed as per the rule if one or more conditions are being matched.
- **Match all of the following:** Select this option to match all conditions collectively. The ticket will be routed only as per the rule only when all conditions are being matched, else the routing rule will not be applied.

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

4. **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.

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.

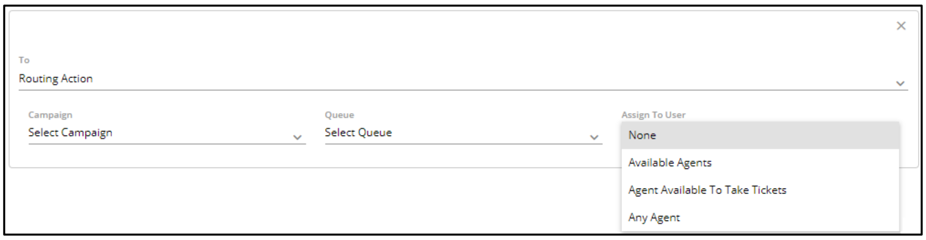


Figure: Routing Action

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 has 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 available to take tickets in Interactive Campaign.
- Any Agent: Select it to assign 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.

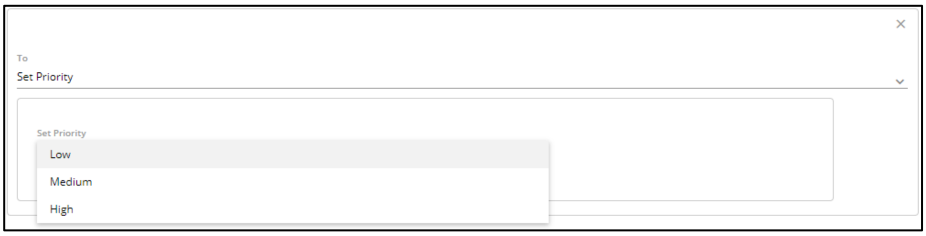


Figure: Priority Action

Select any of the following options.

4.

A.

I.

- Low: Select it to set the low priority of messages that meet pre-selected conditions.
- Medium: Select it to set the 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 the top. In other words, the very first action from the top will be executed first and the other actions will be executed sequentially.

5. Following screenshot contains the sample details.

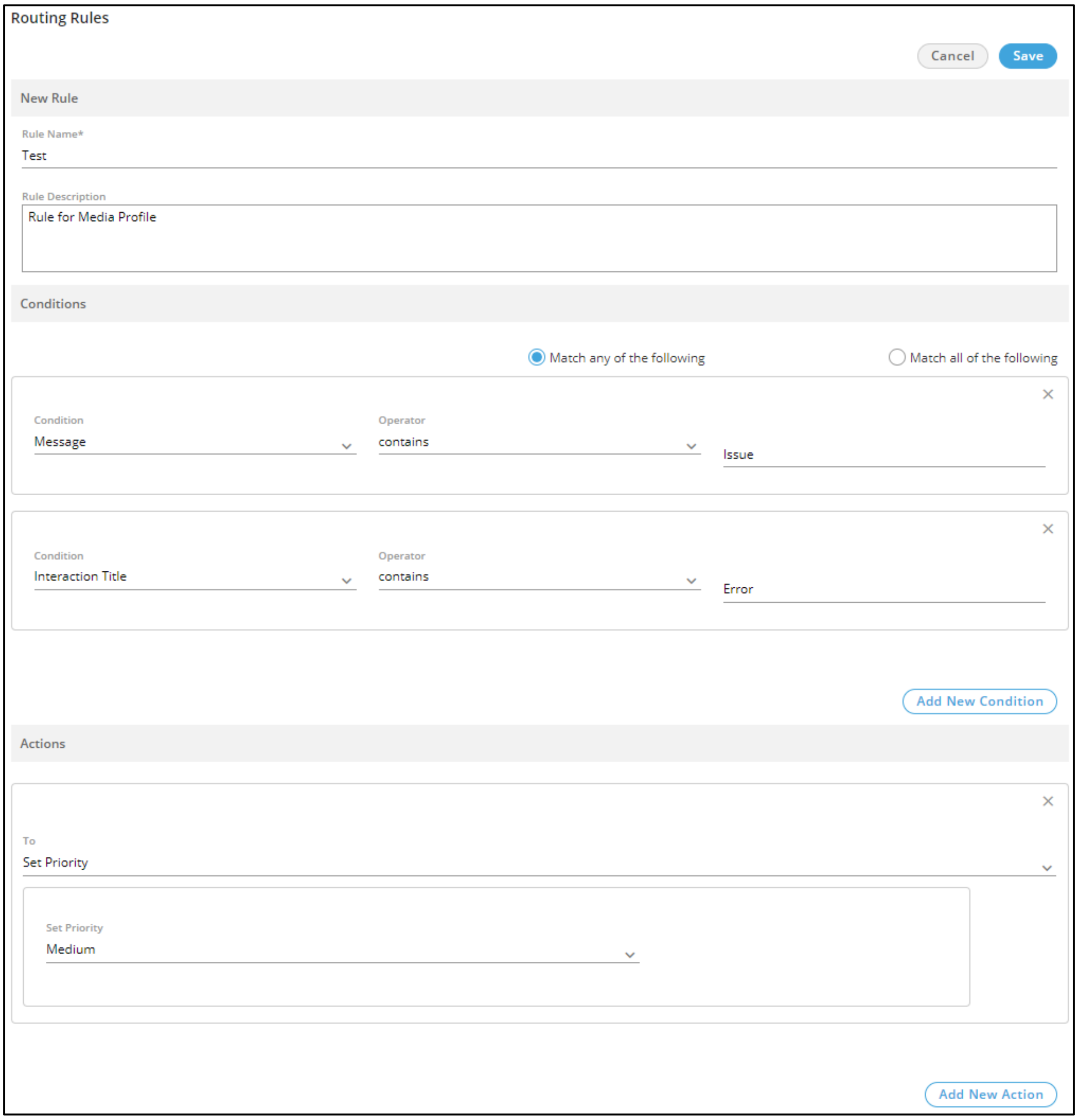


Figure: Adding New Rule

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.

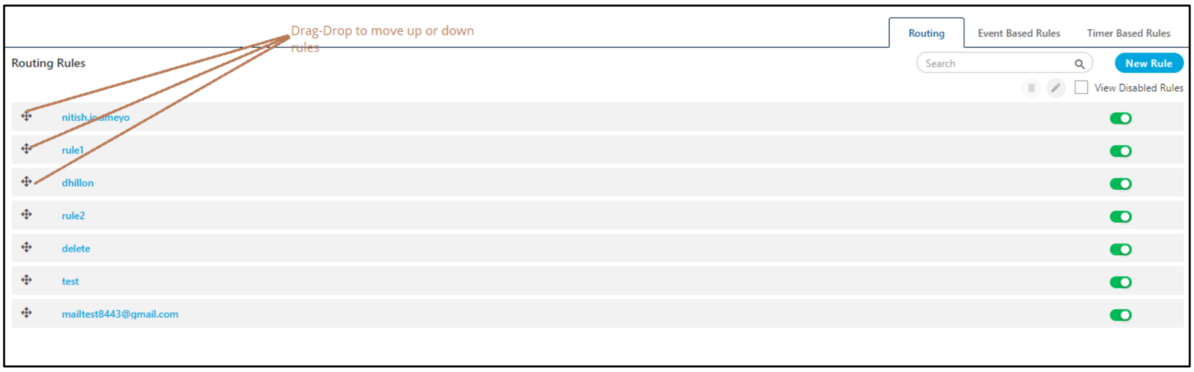


Figure: List of Rules

9.12.2.1.2 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 the 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.

9.12.2.1.3 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.

9.12.2.1.3.1 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.

9.12.2.1.3.2 View Disabled Rules

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

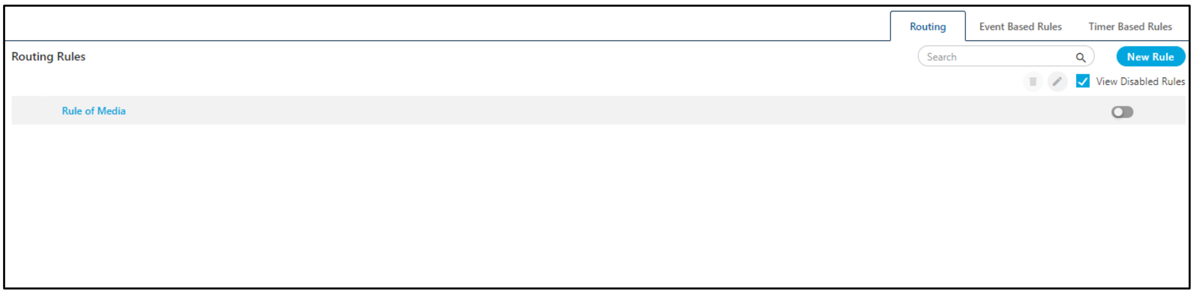


Figure: Displaying the Disabled Rule

9.12.2.1.3.3 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.

9.12.2.1.4 Edit a Rule

Perform the following steps to edit a rule.

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

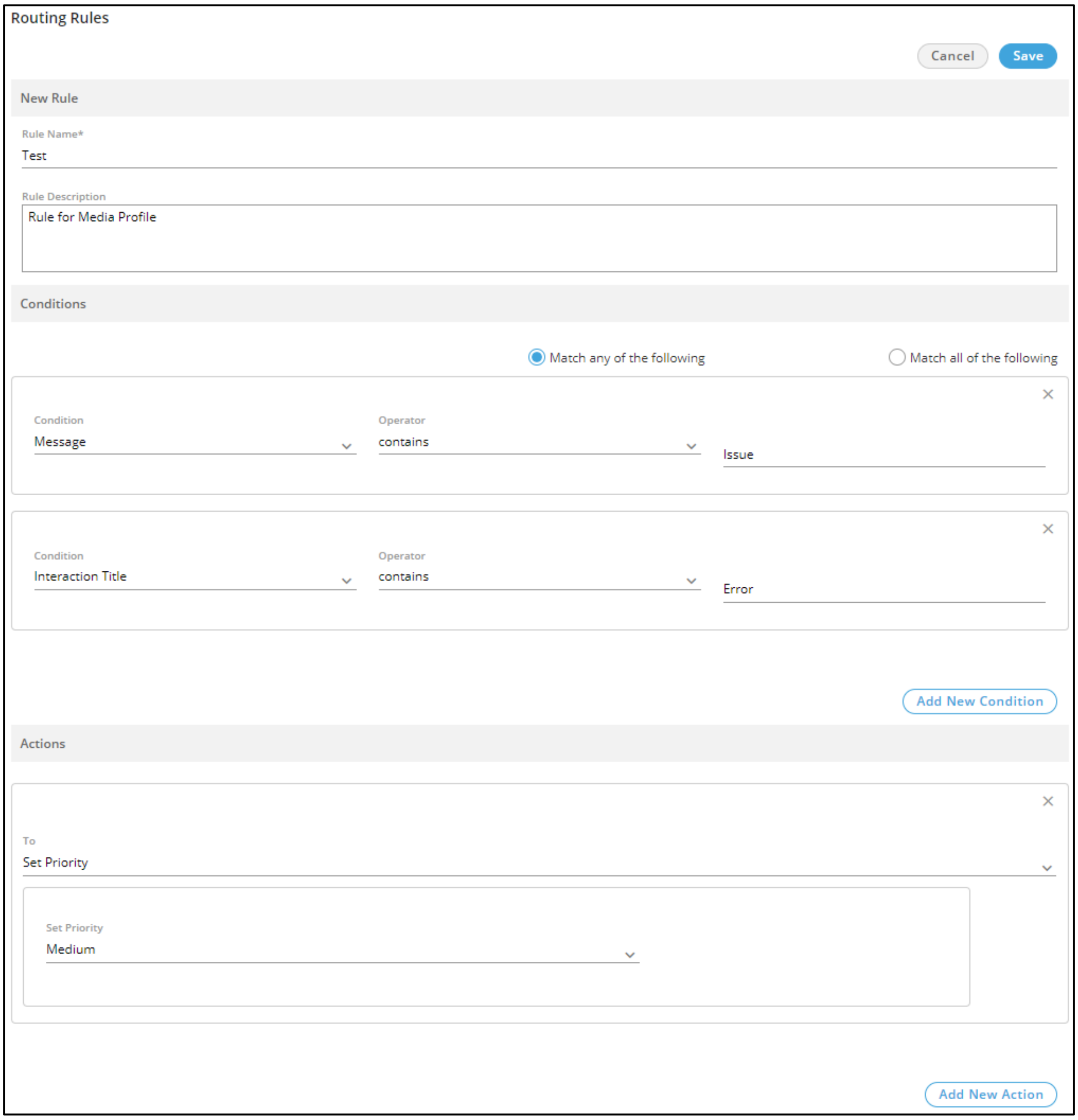


Figure: Edit a Rule

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

9.12.2.1.5 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.

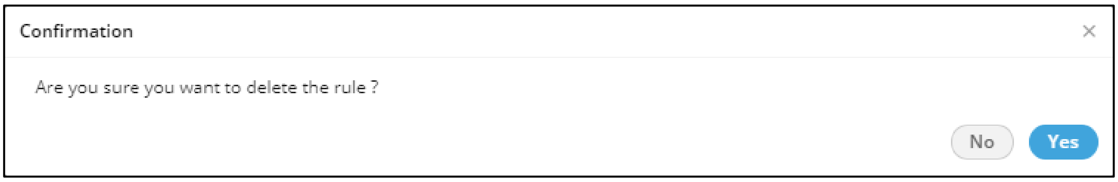


Figure: Warning before deleting a Rule

2. Click "Yes" to delete the rule.

9.12.2.2 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.

9.12.2.2.1 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.

9.12.2.2.2 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 required 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()
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.
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
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();

9.12.2.2.3 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

9.12.2.2.4 Initialization and Accessing Variable in Scripts

9.12.2.2.4.1 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");
```

9.12.2.2.5 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.

9.12.2.2.6 Steps to apply HTTP Action

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

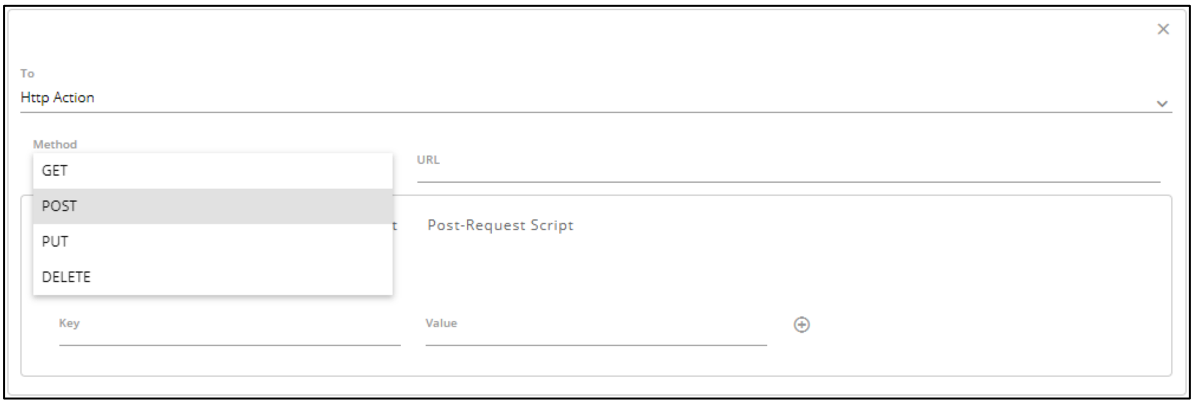


Figure: HTTP Action

Now, perform the following steps.

1.

2. **GET:** 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.

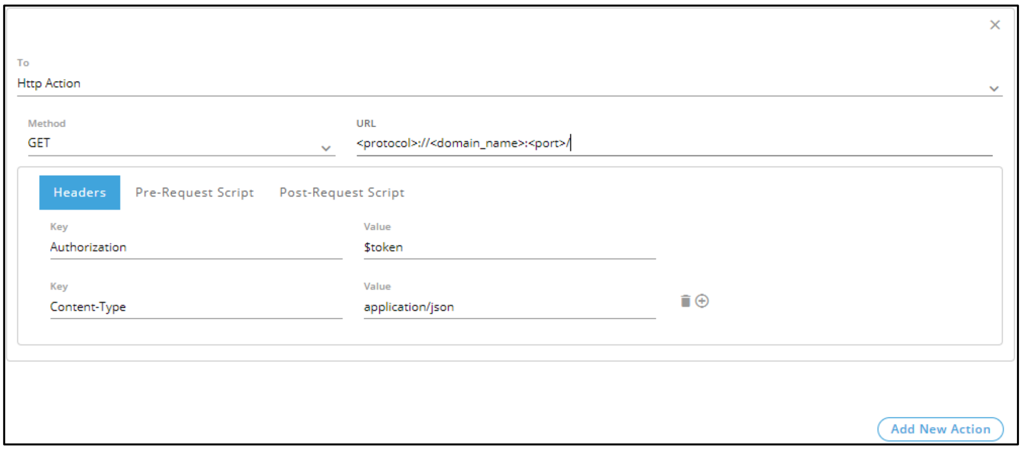


Figure: GET Method of HTTP Action

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);
```

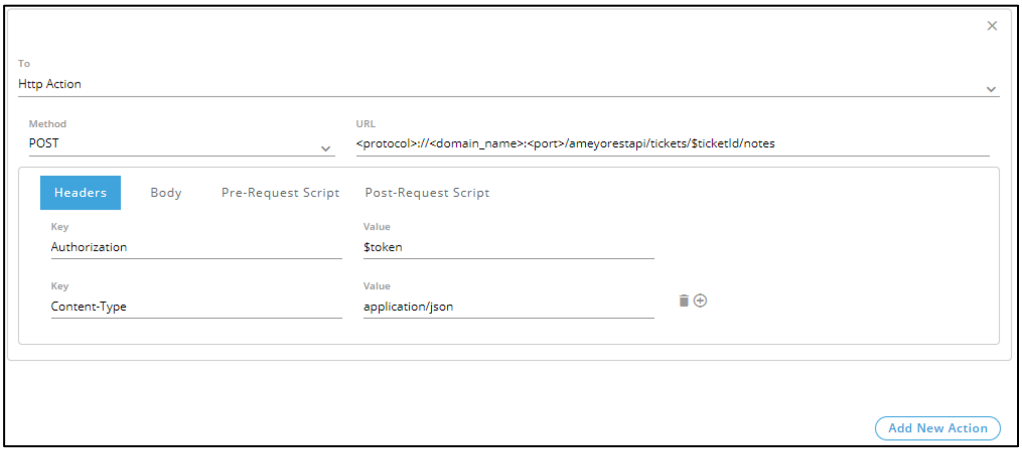


Figure: POST Method of HTTP Action

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.

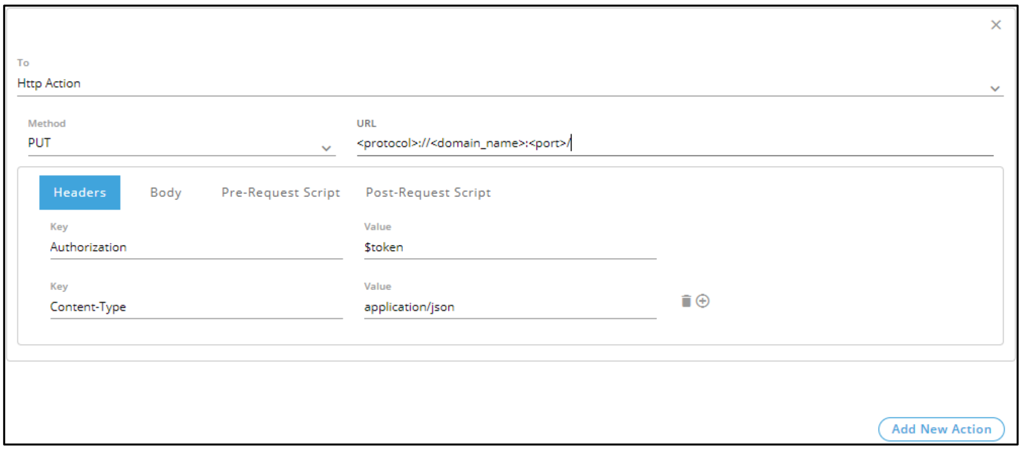


Figure: PUT Method of HTTP Action

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.

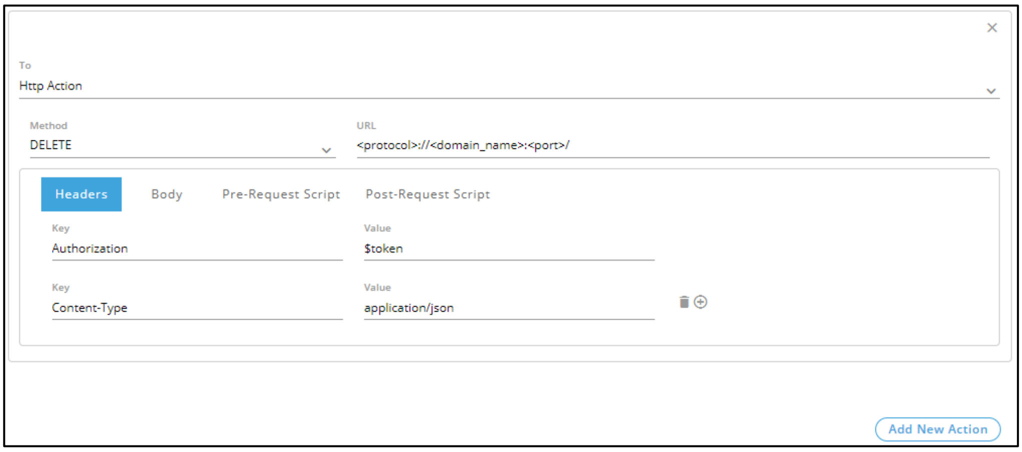


Figure: DELETE Method of HTTP Action

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 other actions also in Routing Rules, Event-based Rules, and Timer-based Rules. Click the following links to know more about the same.

- **Actions in Routing Rules**
- **Actions in Event-based Rules**
- **Actions in Timer-based Rules**

9.12.2.3 Routing Rules for Missed Chat

9.12.2.3.1 What is a Missed Chat?

A Missed Chat is defined as a chat that is not attended by the agents due to any reason whatsoever. The following are some reasons due to which a chat could not be attended.

- The business has configured the non-working hours and holidays. The consumer is using the Chat Channel to contact the agents in non-working hours or a holiday.
- All agents were busy attending other consumers due to which a chat of a consumer was not served.

9.12.2.3.2 Business Use Case

Some consumers might have tried to reach for certain problems, or some requests, or to give a lead to make sales. For any organization, it is essential to give proper attention even to those customer communications (including chats) that were missed to be attended because of any reason whatsoever. Therefore, it is important for Ameyo to track the missed chats, and the best possible way is to create the tickets for missed chats with the details of the consumer.

9.12.2.3.2.1 Example

Suppose a consumer has requested for the chat to either get the bill details, change the plan, or migrate to the business' subscription in the non-working hours. As a result thereof, the consumer's sent messages were not attended, and the chat has been missed. If the routing rule is configured to create the tickets of missed chat, then the business will be able to view what all chats have been missed and what have been asked by a consumer in missed chat.

9.12.2.3.3 Creation of Routing Rules for Missed Chats

It is required to create a routing rule for the Missed Chats so that a ticket will be created for every missed chat. The Supervisors or the agents can go through the tickets created for Missed Chats and establish contact with the relevant consumers to meet their requirements.

Perform the following steps to create a routing rule for the Missed Chats.

1. **Rule Name:** Provide the name of the rule.
2. **Rule Description:** Describe the rule.
3. **Conditions:** Select the following in Conditions Sections.
    - **Condition:** Select "Interaction Title" as the condition from the drop-down menu.
    - **Operator:** Select "Contains" from the drop-down list of operators.
    - Enter "Missed Chat from" as the issue name.
4. **Actions:** Select "Routing Action" from the drop-down list of actions and provide the following routing action.
    - **Campaign Name:** Select the Interaction campaign name to which you want to create the routing rule.
    - **Queue Name:** Select the name of the queue to which you want to create the routing rule.
    - **Assign To User:** Select the type of the agent to whom the missed chat ticket will be assigned from the drop-down menu.
    - The Administrator can create multiple actions for multiple Interaction Campaigns and their queues.
5. Click "Save" button to save the rule.

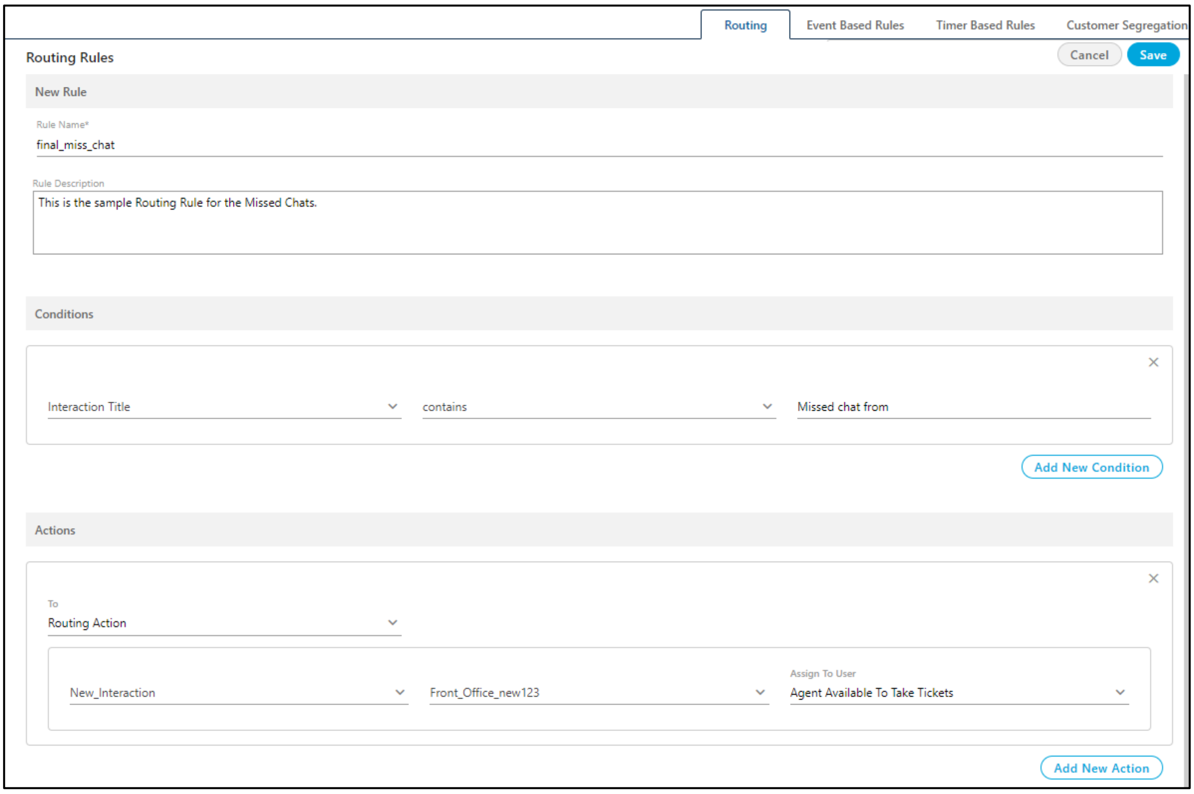


Figure: Sample Missed Chat Routing Rule

9.12.2.4 Routing Rules for Offline Chat

There is a possibility that the customers can ask for Chat Support at any point of time. If a customer is contacting during the non-working hours or holiday of the business, then such messages should be stored in Ameyo Application Server so that the agents can reply to the customer later on. To meet this requirement, the feature to create the tickets for the offline chat messages received on the Multimedia Chat Channels is available. The Administrator has to create the Routing Rules and upload the desired nodeflow for this purpose.

9.12.2.4.1 Routing Rule

The Administrator has to create the Routing Rule for the Missed Chat at the Multimedia Channels even deployed using Sunshine (Smooch). This rule will be similar to the rule that is required to create the tickets for Missed Chats in Ameyo Web Chat.

In "Condition", select "Interaction Title", select the condition as "starts with", and provide "Offline chat from: " value. In "Actions", select "Routing Action", select campaign and queue, and select "None" in "Assign to User". Refer to the following screenshot.

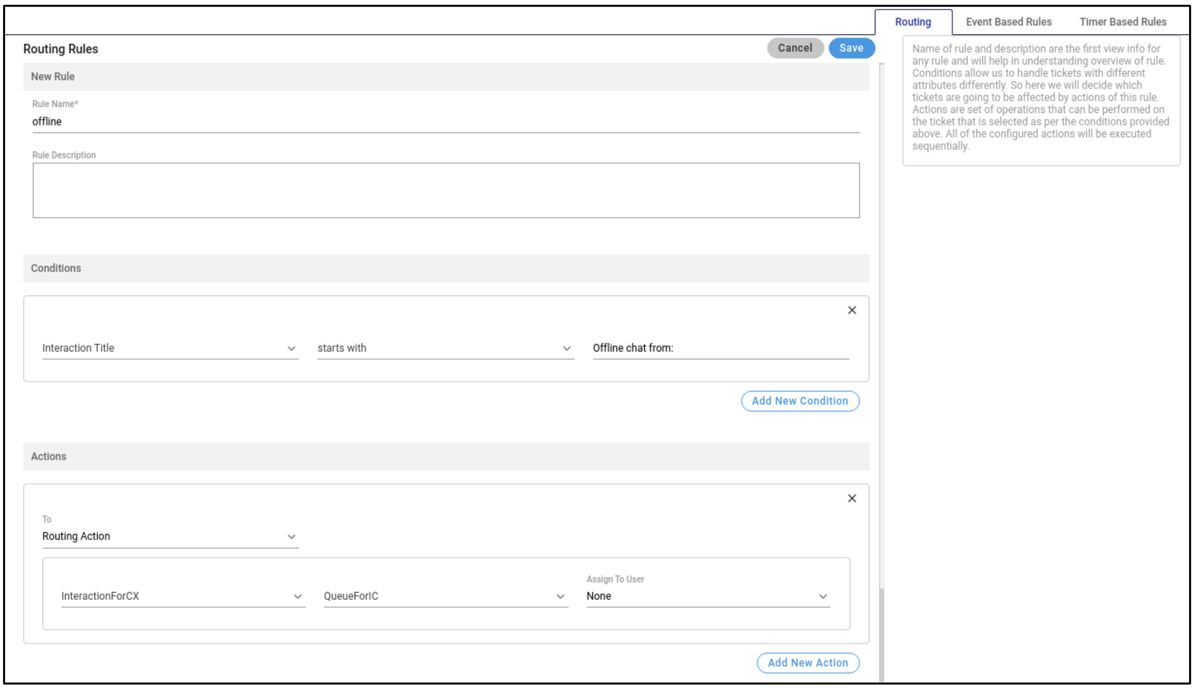


Figure: Routing Rule to create Ticket for Offline Messages

After creating the rule, if a customer is sending a message on Multimedia Chat (such as WhatsApp, Facebook Messenger, Twitter DM, or another medium) configured through Sunshine (Smooch) in the non-working hours or a holiday, then a ticket will be created automatically. If a ticket already exists, then the messages will be appended to that ticket.

9.12.2.4.2 Predefined Nodeflow and Messages

The Administrator has to upload a nodeflow to give the predefined messages in case of non-availability of the agents. If the customer sends a message when the chat is offline, then the customer should also be notified through these predefined messages. The following message is displayed when the customer sends a message during non-office hours using the nodeflow.

Sorry, we are currently closed. Please leave a message and we will get back to you during office hours.

The following message is displayed using the nodeflow when the customer sends a message during the holiday.

Sorry, we are closed today on account of a holiday. Please leave a message.

Now, the customer has a 2-minute window to send all messages. After 2 minutes, the following message is sent using the nodeflow.

"A ticket has been created with the above details. Our customer care representative will contact you in the next working hour."

But the textbox will not be disabled, and all messages done after this chat completion will be lost.

9.12.2.4.3 Changing the Predefined Messages

The above messages can be changed as per the requirement. These messages are stored in "/dacx/ameyo/com.drishti.dacx.server.product/plugins/com_drishti_ameyo_media_dim_engine_1.0.0.201912201348/resources/messages/errorMessages.properties"
as key values in their respective files.

- **ChatCampaign.offline.holiday.welcome.message:** Sorry, we are closed today on account of a holiday. Please leave a message.
- **ChatCampaign.offline.nonOfficeHour.welcome.message:** Sorry, we are currently closed. Please leave a message and we will get back to you during office hours.

- **ChatCampaign.offline.chat.completion.message:** A ticket has been created with the above details. Our customer care representative will contact you in the next working hour.

So, if we have to change any of the above messages, then update in the file with respect to the key. However, after upgrading the build, these changes will not be updated and remain as old. Therefore, these files have to be changed again as per the requirement after upgrading the Ameyo Application Server every time.

9.12.3 Event-based Rule

9.12.3.1 Event-based Rules

The event based rules are executed automatically upon detecting the occurrence of an event.

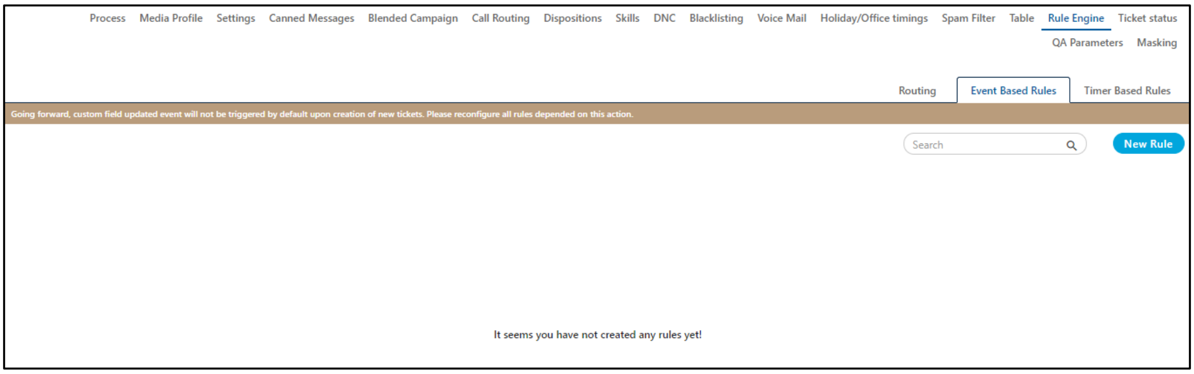


Figure: Event-based Rules Tab

9.12.3.1.1 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.

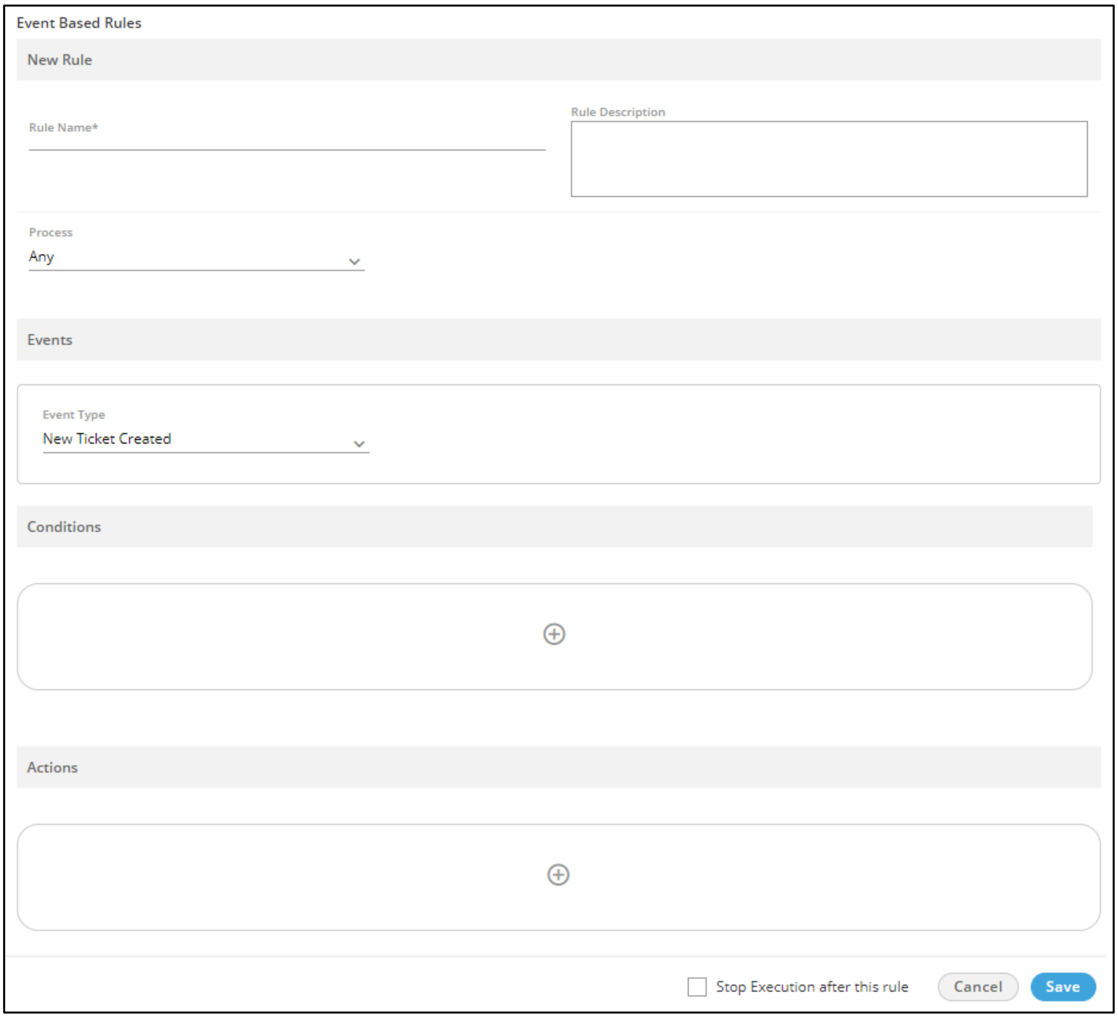


Figure: Add an Event Based Rule

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 a new lite ticket created.
- **Ticket Updated:** This event is generated whenever an update to a ticket is detected such as an escalation is marked, de-escalation is marked, 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 the Supervisor to the Agent, from the Agent to the Supervisor, or from an Agent to another Agent. Selecting it shows two adjacent drop-down menus that lets you select the ticket assignor and ticket assignee.

Figure: Ticket Transferred to Agent Event

- Ticket Auto-Assigned: This event is generated whenever a ticket is auto-assigned to the agents. Know more...

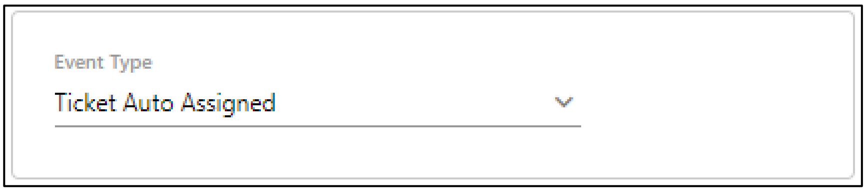


Figure: Ticket Auto-Assigned Event

- **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 the 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 let 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.

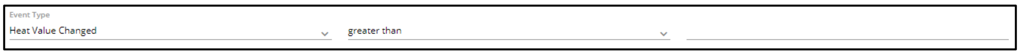


Figure: Heat Value Changed Event

- **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 the "Condition" box to add a new condition. It shows the following section.]

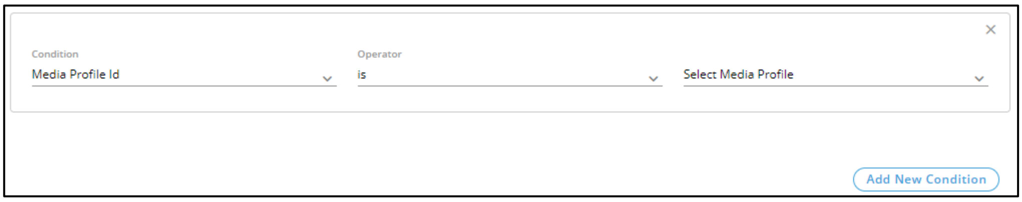


Figure: Add a Condition

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

I.

II. **Media Profile:** 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

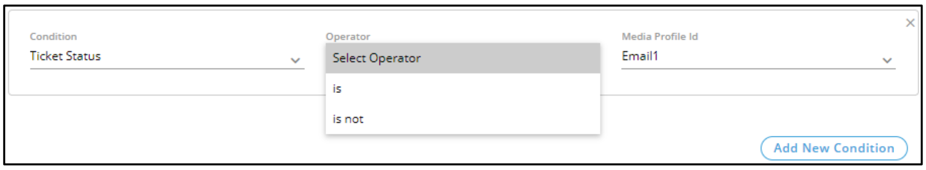


Figure: "Ticket Status" Condition

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

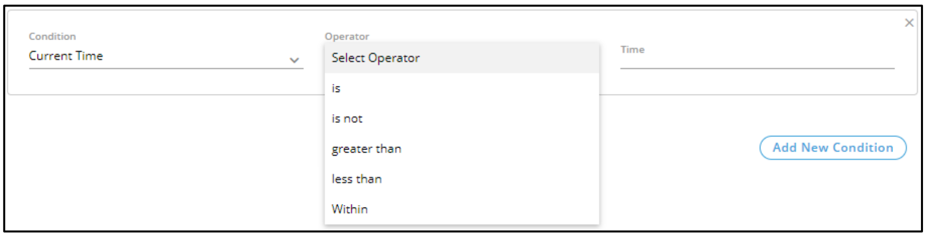


Figure: "Current Time" Condition

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

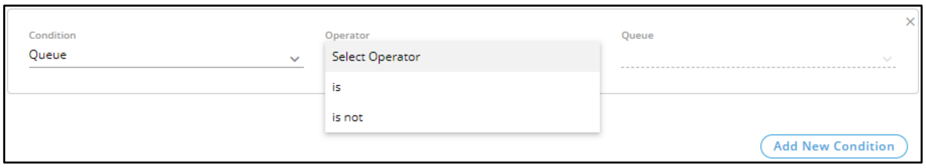


Figure: "Queue" Condition

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

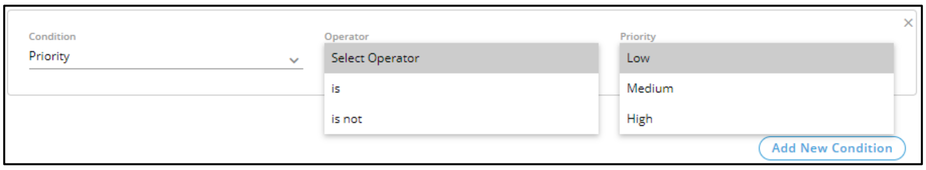


Figure: "Priority" Condition

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.

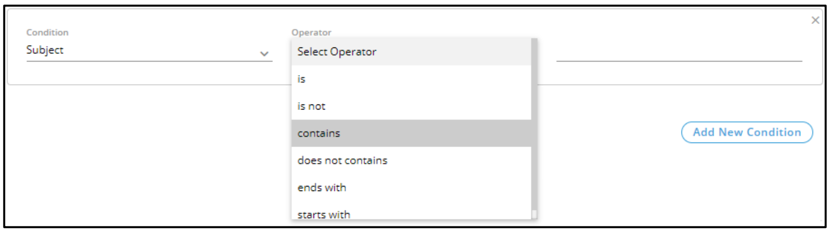
- is
- is not
- contains
- does not contain
- ends with
- starts with
- 

Figure: Subject Condition

VIII. After selecting an operator, provide a value in the adjoining text field.

IX. **Custom Field:** The Custom Field field created at the System-level will appear in the condition. In case of single-level custom field, you just have to select it.

In case of Dependent Multi-level Custom Field, the selection of all values is not required. For a 4-level Custom Field, you can select the values for only one, first two, or first three levels to create the rule.

Example: Take the example of the following multi-level field.

6.

A.

I.

a. Location

i. India

i. Haryana

i. Bhiwani

ii. Gurugram

iii. Faridabad

iv. Rohtak

Now, the Administrator can select only "Location" or "Location" and "Country" to create a rule.

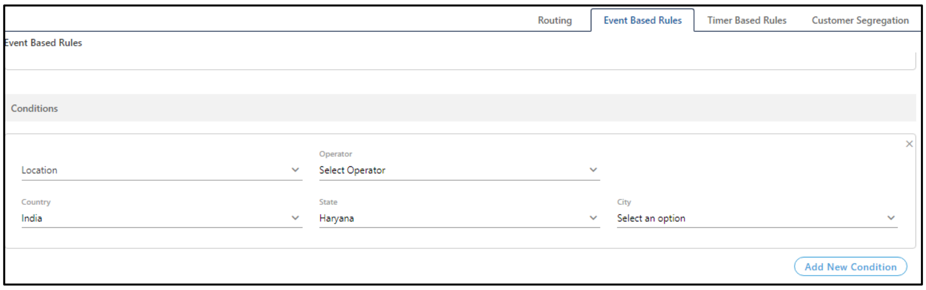


Figure: New type of condition while creating Event-based Rule

II. **[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.

6.

A.

I.

- 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

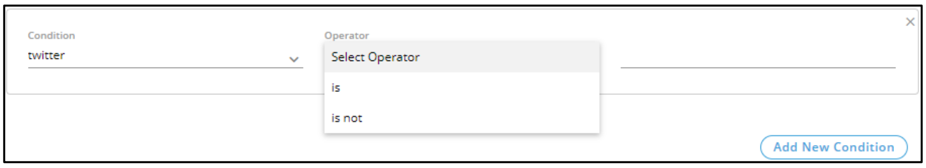


Figure: Other Condition

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

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

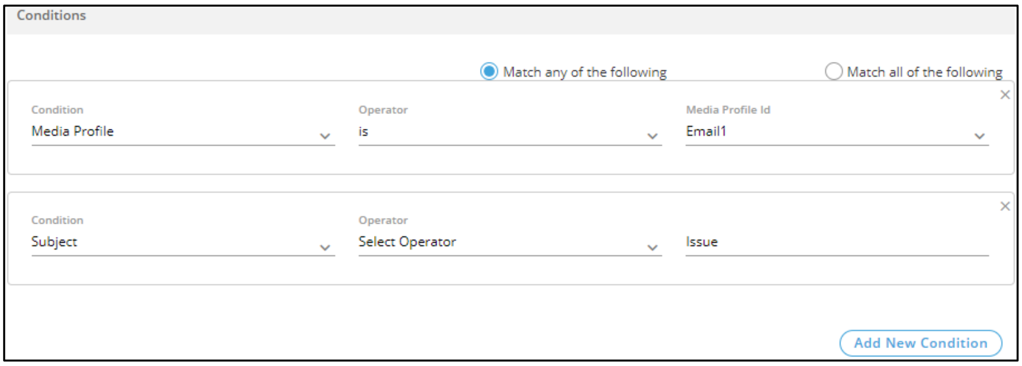


Figure: Multiple Conditions

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 match any of the conditions. The rule will be applied if one or more conditions are being matched.
- **Match all of the following:** Select this option to match all conditions collectively. The Rule will be applied only when all conditions are being matched, else the rule will not be applied.

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

7. **<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.

7.

   A.

      I.

      II. **Escalate Ticket:** Select it to escalate the tickets which meets the pre-selected conditions.

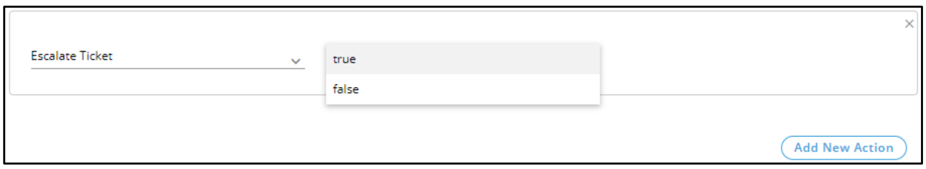


Figure: Escalate Ticket

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 options in "Assign to User" drop-down menu.

- Available Agent: Select it to transfer the ticket to the agent who is available.
- Agent Available to Take Tickets: Select it to transfer the ticket to any of the agents, who are available to take the ticket.
- Any Agent: Select it to transfer the ticket to any agent randomly irrespective of its availability status.

V. **Send Email To:** Select it to send an email to any recipient for those tickets which meets the pre-selected conditions.

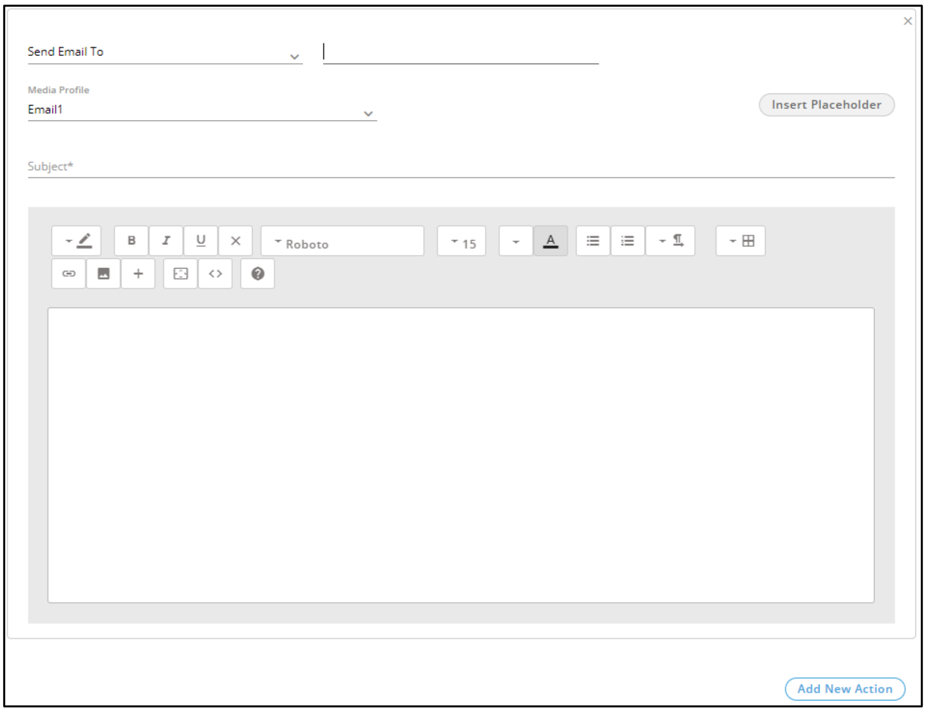


Figure: Send Email To Action

- 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.

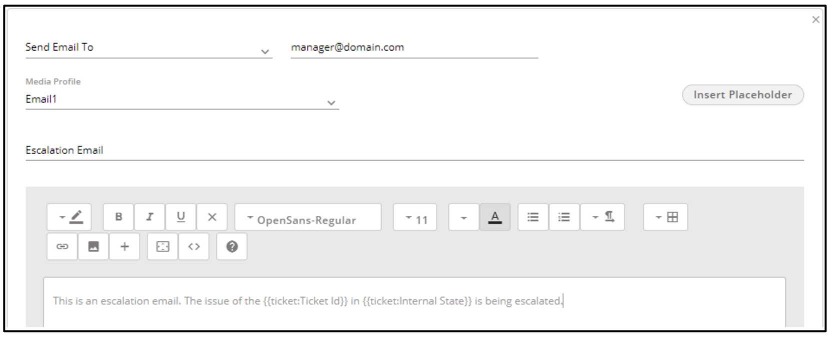


Figure: Sample Email

VI. **Send Email To All Supervisors:** Select it to send an email to all supervisors for those tickets which meet the pre-selected conditions.

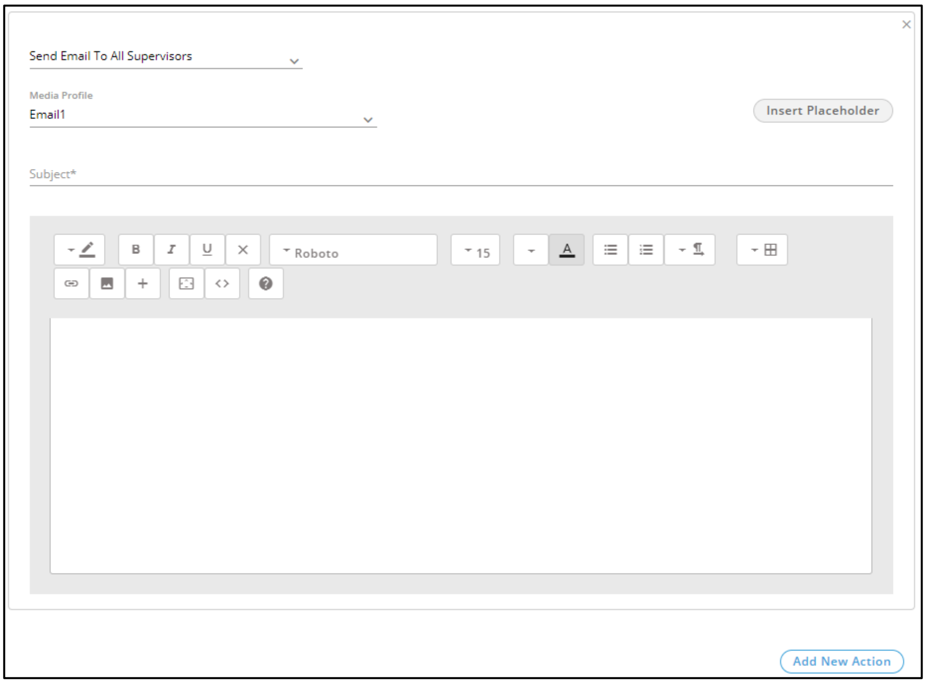


Figure: Send Email To All Supervisors

- 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.

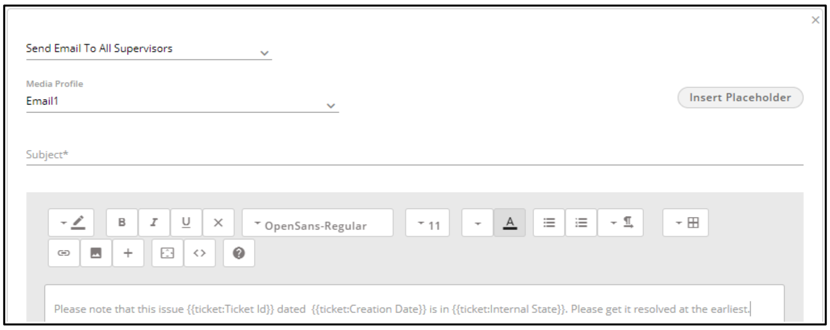


Figure: Sample Email

VII. **Send Email To Agent:** Select it to send an email to the selected agent for those tickets which meets the pre-selected conditions.

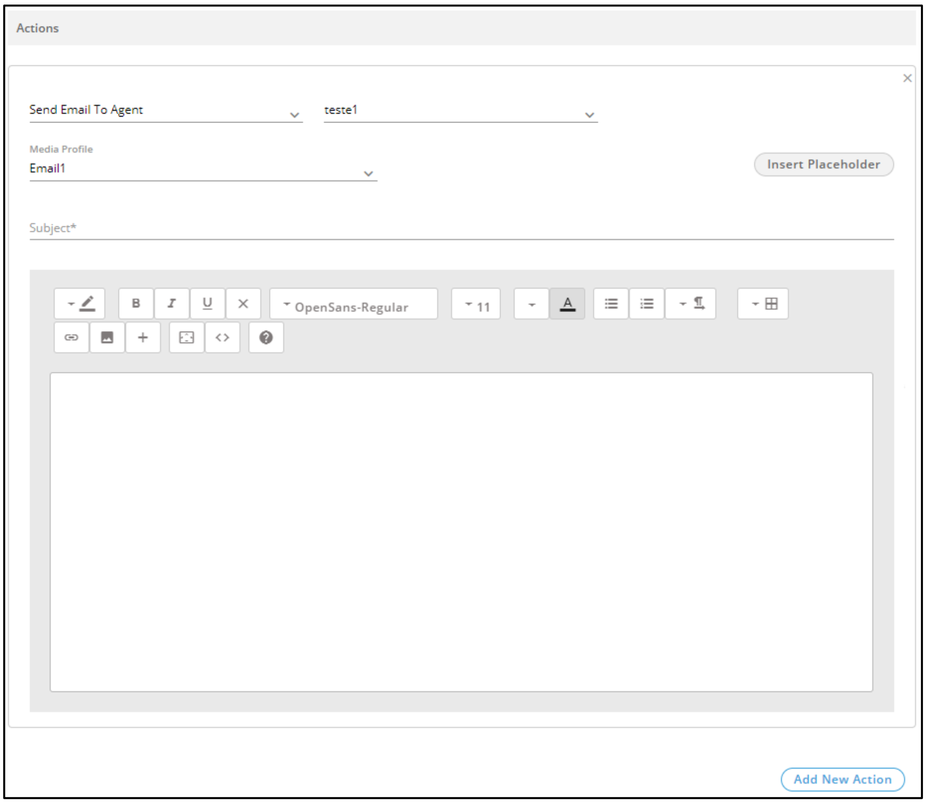


Figure: Send Email To Agent

- 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.

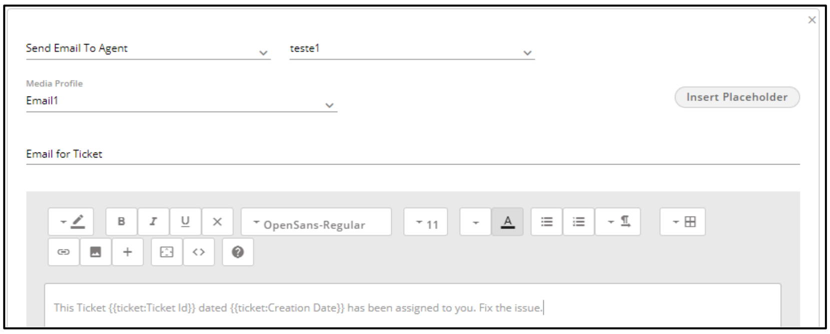


Figure: Sample Email

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.

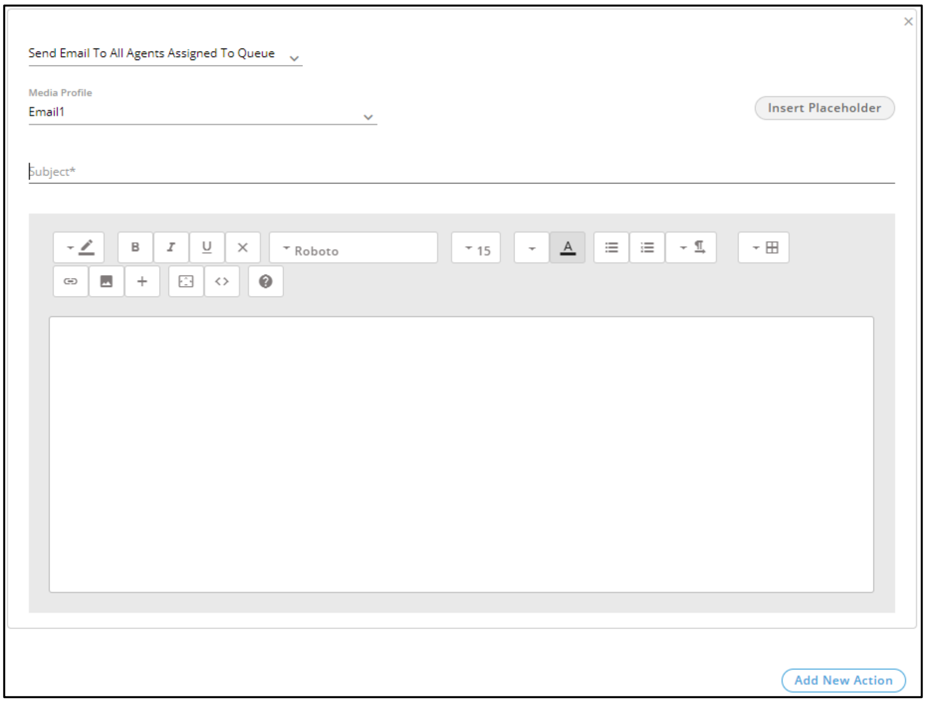


Figure: Send Email To All Agents Assgined to the Queue

- 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.

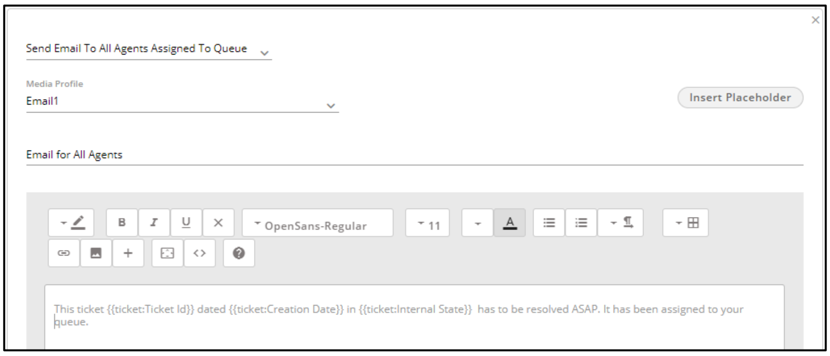


Figure: Sample Email

IX. **Send Email To Requester:** Select it to send an email to the requester for those tickets which meets the pre-selected conditions.

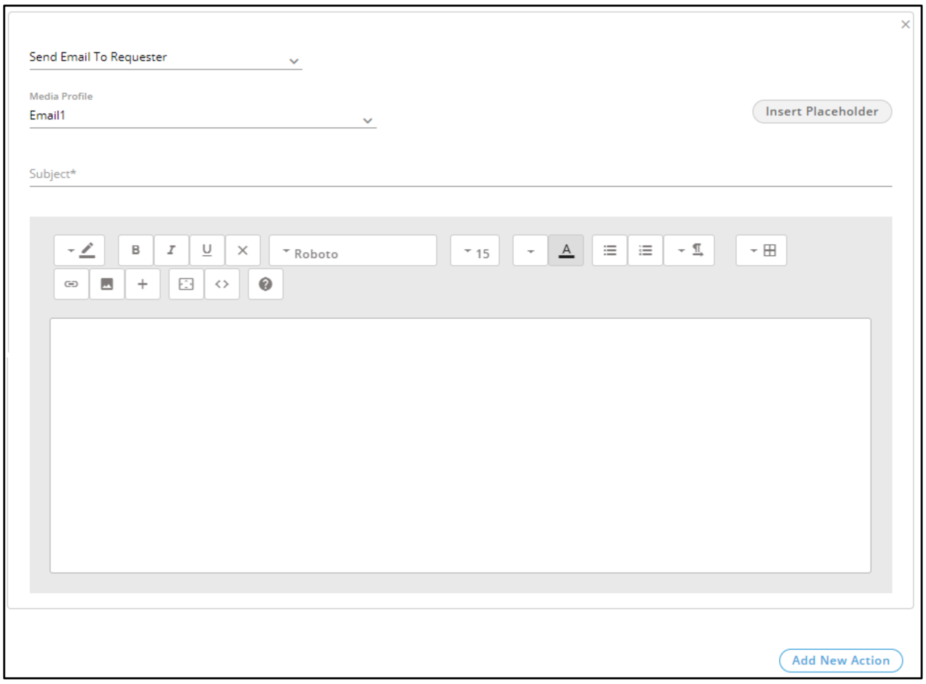


Figure: Send Email To Requester

- 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.

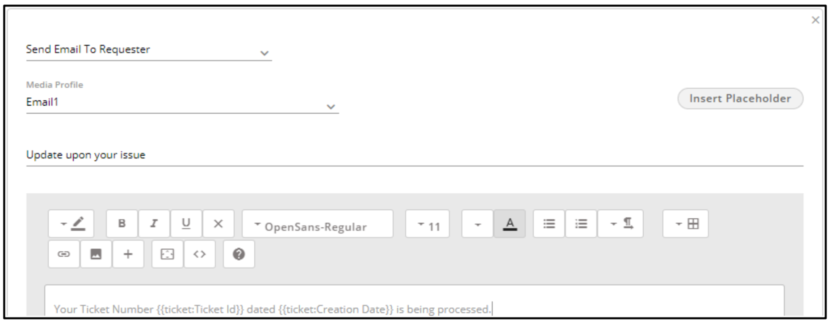


Figure: Sample Email

X. **Send Feedback To Requester:** Select it to send a feedback email to the requester for those tickets which meets the pre-selected conditions.

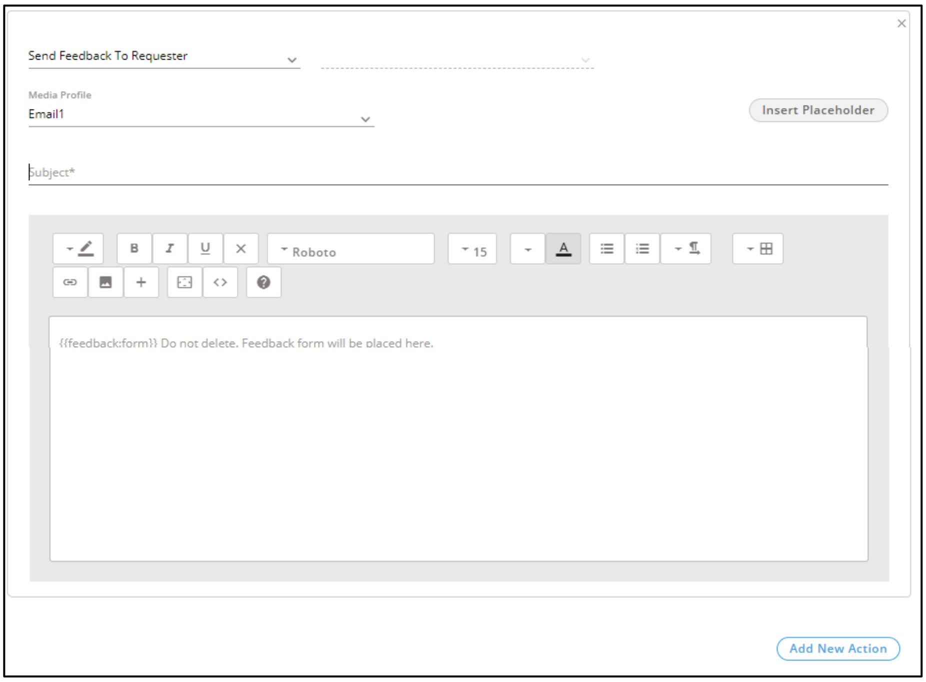


Figure: Send Feedback To Requester

- 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.

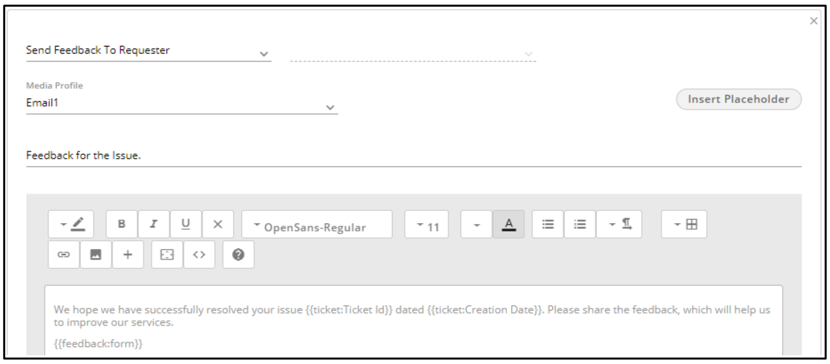


Figure: Sample Feedback Email

XI. **Assign Ticket to Agent:** Select it to assign those tickets to the selected agent which meets the pre-selected conditions.

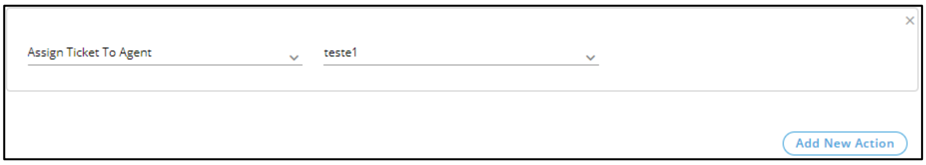


Figure: Send Email To All Supervisors

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.

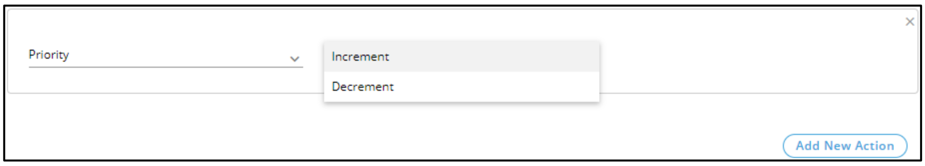


Figure: "Priority" Action

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.

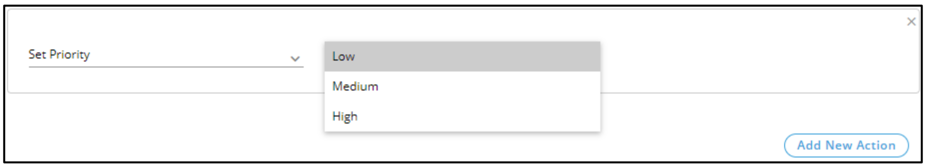


Figure: "Set Priority" Action

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.

XVI. **Set Custom Field Using HTTP Action Response**: Select it to allow to ask an external system to update the custom field and as a result thereof, take any additional action upon the creation or modification of a ticket.

When a custom field is hidden then also custom field is getting update, checked from the backend. And able to search the same from the advance filter even custom field is hidden for that ticket.

Sample JSON Formats

The required sample JSON formats for the following custom fields for integer, boolean, and string values, which has to be generated, after calling the API of the third-party external system are also provided.

- Single-Selection List Box
- Multi-Selection List Box

- Single Line Field
- Checkbox
- Radio Button
- Dependent Single Selection List Box

Following is the database entry of a single Selection List Box.

```
custom_field_id           | d625-5d094290-cf-0
column_name               | CB
contact_center_id         | 1
custom_field_data_type    | String
custom_field_name         | SSLB
custom_field_type         | SingleSelectionListBox
default_value             |
possible_values           | ["1","2","3","4","['k']"]
process_id                | 2
is_required               | f
is_searchable             | f
custom_field_category_id  | 2
date_added                | 2019-06-19 01:40:08.397
date_modified             | 2019-06-26 20:51:12.223
mandatory_on_creation     | f
```

```
is_editable                  | t
```

The required output from the Sample API stored in the AppServer to modify the above SingleSelectionListBox using "HTTP Response Data" should be in the following format.

JSON for Integer Type:

{d625-5d094290-cf-0:2}

JSON for String Type

{d934-5d0229ef-cf-0:\"Payment Query\"}"

The required output from the Sample API stored in the AppServer to modify the multiple Custom Fields in a ticket using "HTTP Response Data" should be in the following format.

JSON to update multiple Custom Fields

{d119-5d134249-cf-2:[1.1,1.2],d119-5d134249-cf-1:[\"string1\",\"string2\",\"string3\",\"string4\"]}

9.12.3.1.2 Example of Third-Party API

Following is the sample API that will be called in the test case created for this story.

```
<?php
echo "{d581-5d0a3128-cf-0:{\"Country\":\"New Zealand\",\"State\":\"Zero\"}}";
```

?>

9.12.3.1.3 Steps to create a HTTP Response to update a Custom Field using above Sample API

Perform the following steps.

7.

A.

I.

a. The Administrator has to create or modify a Routing Rule, Event-based Rule, or Timer-based Rule.

b. Select "GET" as the method.

c. In URL, provide the URL at which the Sample API is stored in Ameyo AppServer.

d. Select "HTTP Action" as the first action in "Actions".

e. Select "Post-Request Script" tab and provide the following JavaScript Code.

```
variables.put("$thridPartyCustomFieldData",responseString);
```

The above code has to be used as-it-is in whenever you want to update the Custom Field using HTTP Response.

f. Now, click "Add New Action" button in the right corner.

g. Select "Set Custom Field Using HTTP Action Response" in the new action. Refer to the following screenshot.

Figure: New Action for HTTP Response

h. Click "Save".

You can follow the same steps to add different kinds of multiple actions. They will run in sequential order from top to bottom.

B. Following is a sample screenshot containing an Event-Based Rule with sample details.

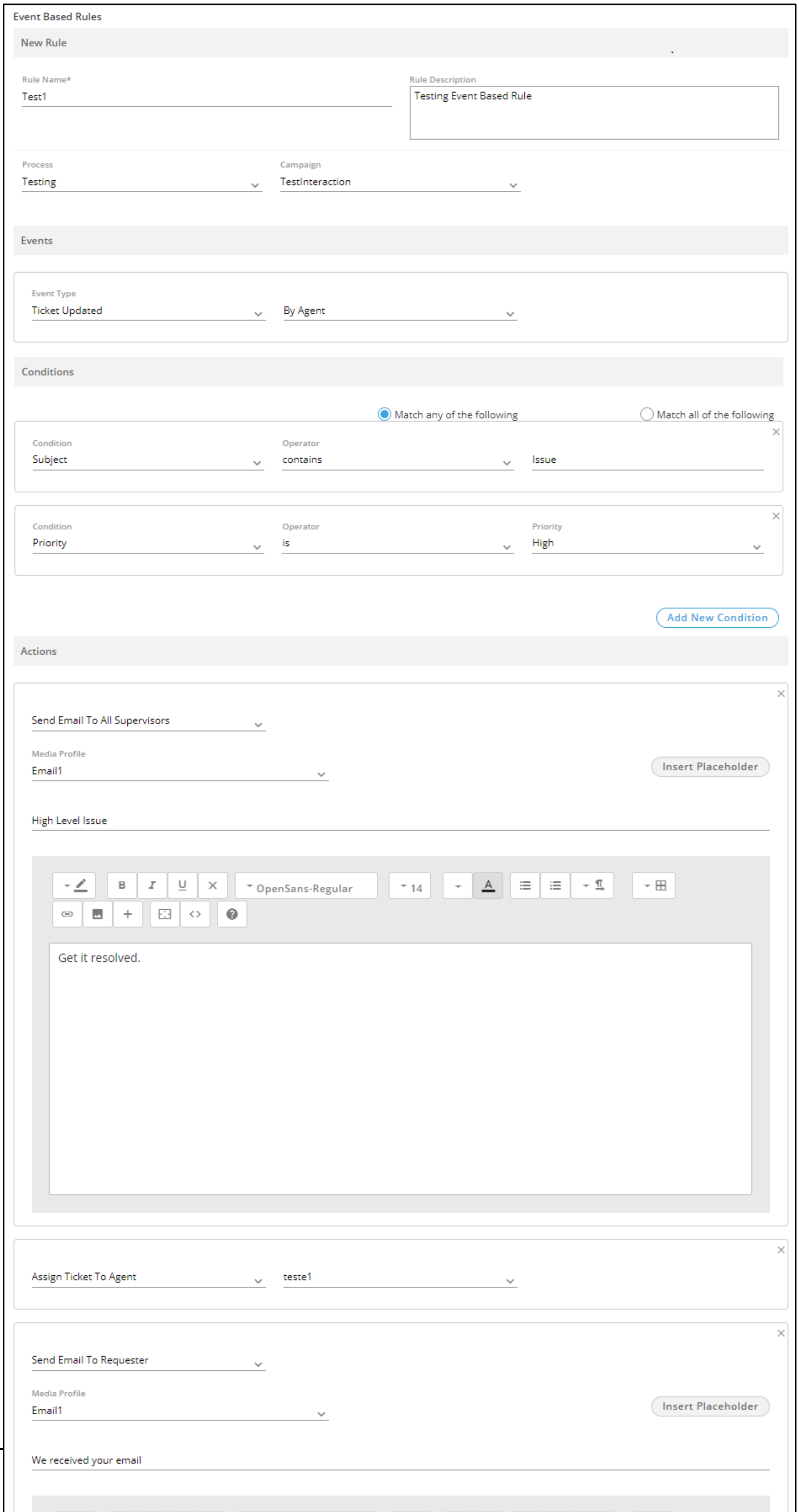

Event Based Rules
New Rule
Rule Name*
Test1
Rule Description
Testing Event Based Rule
Process
Testing
Campaign
TestInteraction
Events
Event Type
Ticket Updated
By Agent
Conditions
Match any of the following
Match all of the following
Condition
Subject
Operator
contains
Issue
Condition
Priority
Operator
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
Media Profile
Email1
Insert Placeholder
We received your email

Figure: Sample Event-based Rule

C. You can check "Stop Execution after this rule" box to stop the execution of other selected actions in this rule.

D. Click "Save" to create the rule.You can create multiple rules for same or different campaigns to filter the tickets using these steps.

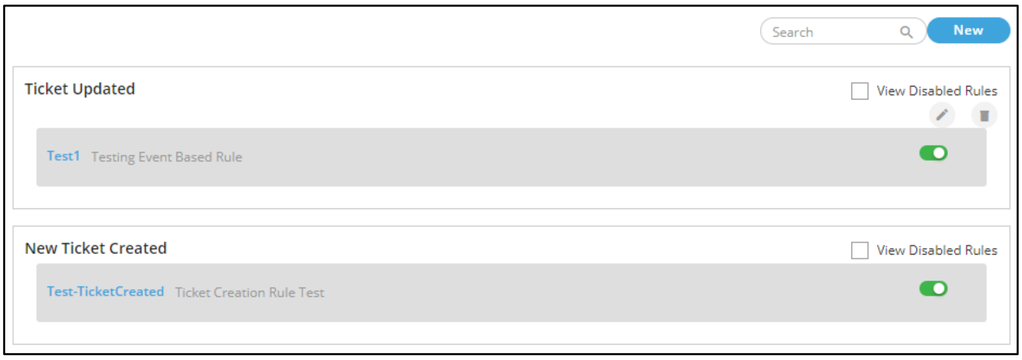


Figure: Added Multiple Event-based Rules

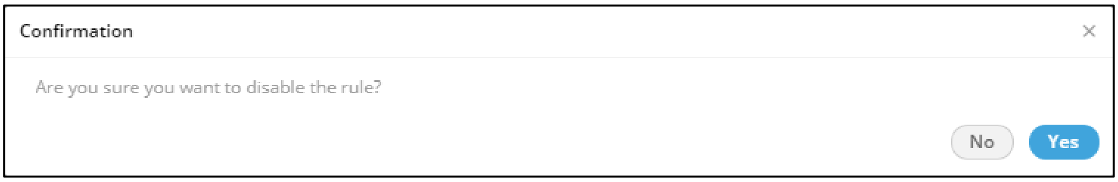
8. If any rule in "Event Based Rules" is assigning or transferring only one ticket to any agent, then its notification to that agent will be displayed after 5 minutes. However, if more than 5 tickets are being assigned or transferred to an agent, then a notification showing all 5 ticket assignment or ticket transfer will be displayed to that agent in real-time.

9. Enable or Disable the Rule

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

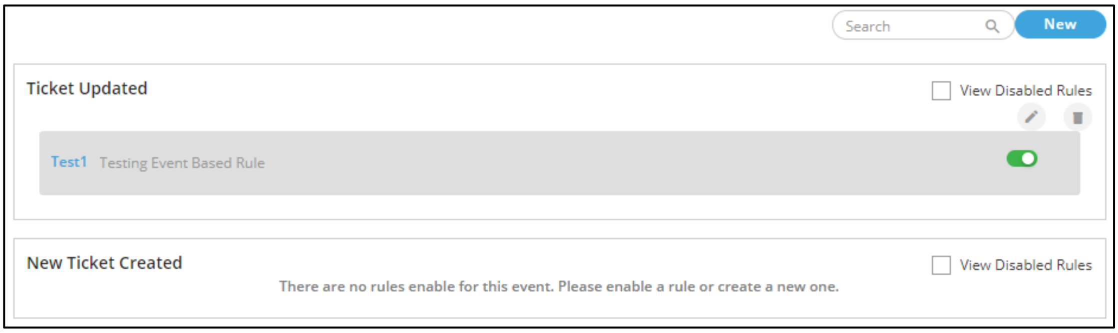
11. Disable a Rule

12. Click the toggle  switch on a rule to disable it. It shows the following message.

13. 

14. **Figure:** Asking to disable the rule

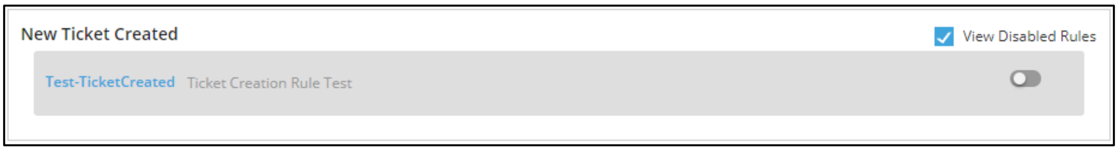
15. Click "Yes" to disable the selected rule. The disabled rule will not be applied in the already selected. Here, its details will be hidden. Following is a disabled rule.

16. 

17. **Figure:** Disabled Rule

18. View the Details of Disabled Rules

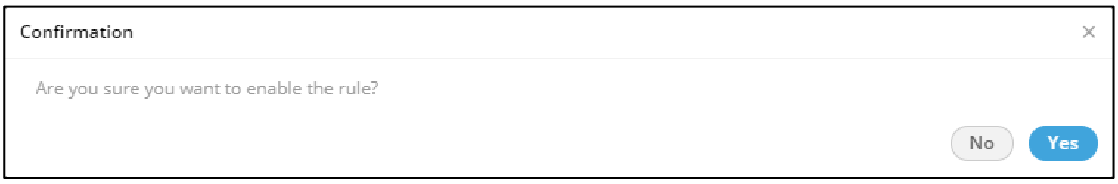
19. In a disabled rule, click to check "View Disabled Rules" box to view its details.

20. 

21. **Figure:** Displaying the Details of Disabled Rule

22. Enable a Disabled Rule

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

24. 

25. **Figure:** Asking to enable the rule

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

27. Edit an Event-based Rule

28. Perform the following steps to edit a rule.

A. Click a rule to select it and click icon. It shows the following pop-up.

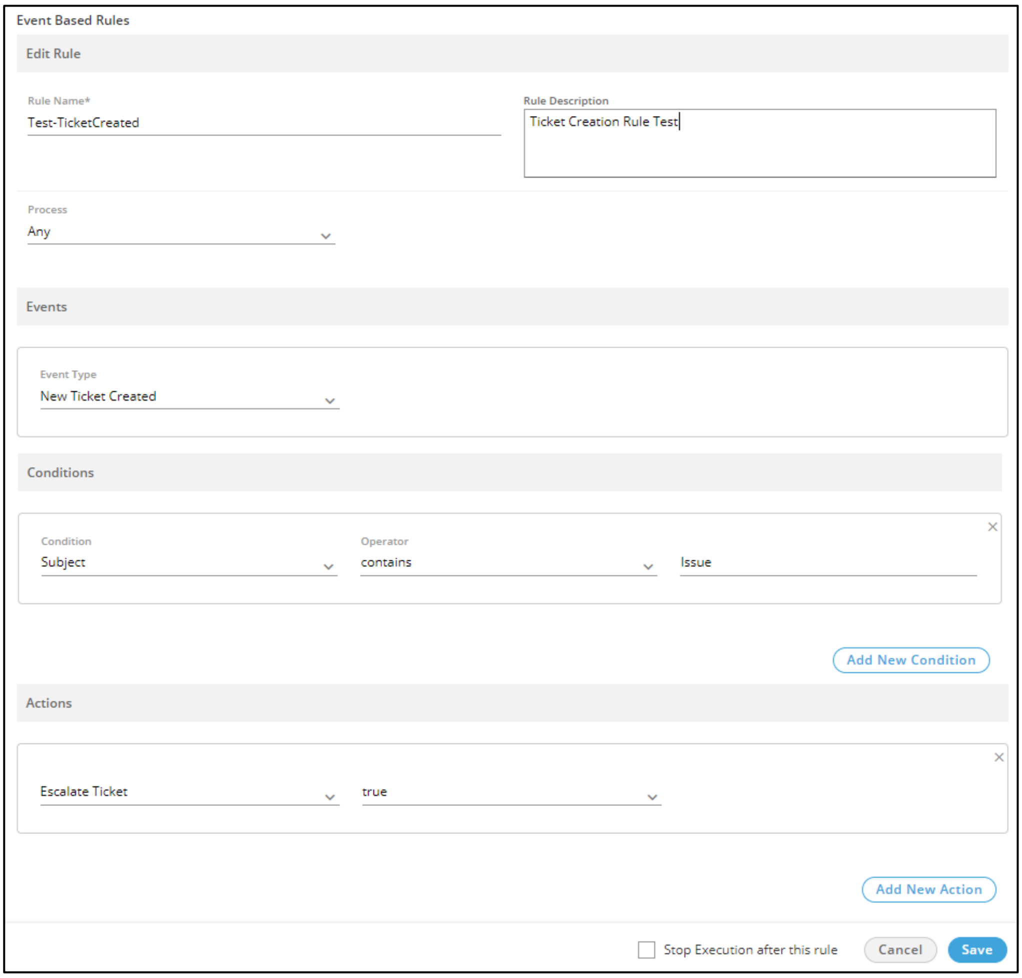


Figure: Edit an Even-based Rule

B. You can make the following changes here.

7.

A.

- 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.

B. Click "Save" to save the changes.

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

9.12.3.1.4 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.

C. 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

D. Click "Yes" to delete the rule.

Rather, you can click "No" to not delete the rule.

9.12.3.2 Event Rules of Browser Notification for Ticket Assignment

Whenever a ticket is assigned to the agent, it is important to show the notification to the agents about the ticket assignment. In such a case, the administrator is required to create an Event-Based Rule for the same.

9.12.3.2.1 Clickable Notifications to show tickets in Filtered View

The Browser Notification displayed through Desktop Notification App and the Bell notification for ticket assignment has been made clickable. The agent can click on any of these notifications to refresh the listing of tickets on Dashboard. During this refresh, the filters already applied on the Dashboard will remain preserved and applied. A toast notification is also displayed that the filtered view has been applied.

The newly assigned tickets will be displayed as per the already applied filter. Consider the following use cases.

- **Use Case 1:** If the agent has applied the filter to view the tickets for the last two months, then the new tickets may not be displayed.
- **Use Case 2:** If the agent has applied the filter to view only WhatsApp based tickets, then only those newly assigned tickets will be visible that are created for WhatsApp Chat. Other newly assigned tickets that do not meet the filter will not be displayed.

9.12.3.2.2 Consolidation of Notifications

Bell, Toast, or Browser notifications of ticket assignments are now consolidated for either a threshold of 5 minutes or a minimum of 5 tickets. It means that an agent will receive the notification when

- less than or equal to 5 tickets are assigned in 5 minutes or
- up to 5 tickets are assigned within 5 minutes.

Consider the following use cases.

- **Use Case 1:** If 5 tickets have been assigned to an agent between 12:00 PM to 12:03 PM, then the agent will receive the assignment notifications of 5 tickets at 12:03 PM.
- **Use Case 2:** If one ticket is assigned to an agent at 12:01 PM, the second ticket is assigned at 12:04 PM, and no other ticket is assigned in the last one minute, then the agent will receive the assignment notification of 2 tickets at 12:05 PM itself.

9.12.3.2.3 Create Rules

The Administrator have to create the following two Event-based Rules to display the notifications for Ticket Assignment in Bell icon. Same rules have to be created now to display the Ticket Assignment Notifications in Desktop App, Toast Messages, and Bell icon.

- **Rule for Ticket Auto-Assigned:** This rule helps to send the notification to the agents when the ticket is auto-assigned to the agent. Create a rule with "Ticket Auto-Assigned" event with any condition and "Show Notification to Assignee" action. Refer to the following screenshot.

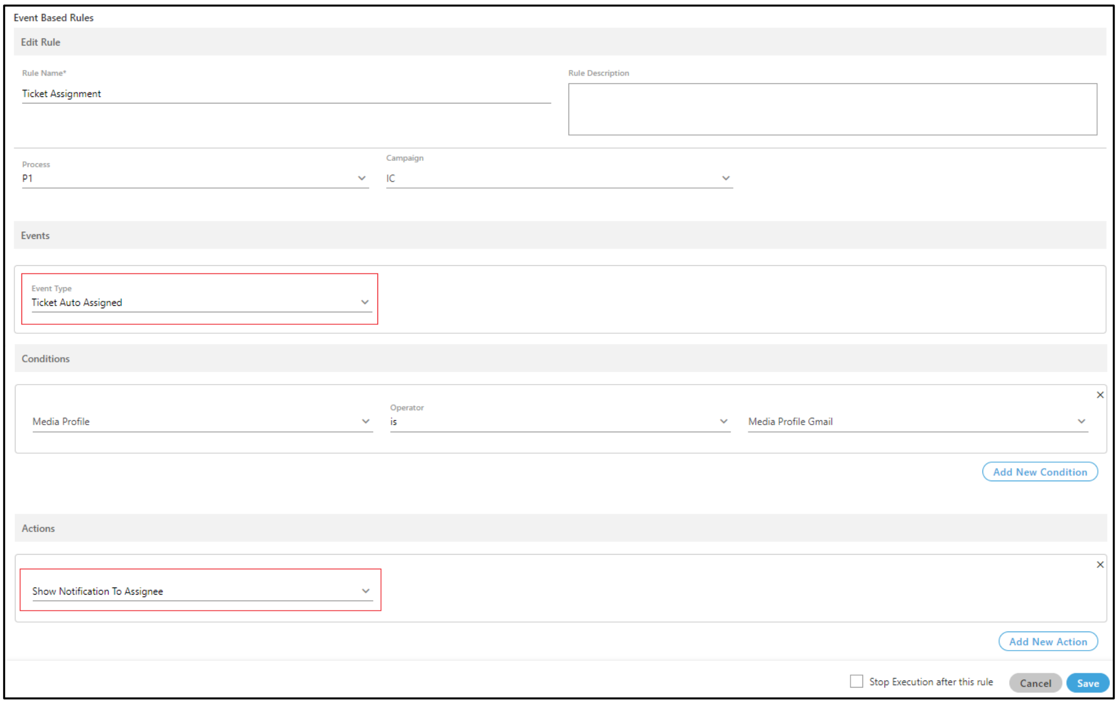


Figure: Rule of "Ticket Auto-Assigned" event to display the ticket assignment notifications

Provide the following information to create the rule.

1. **Rule Name :**Enter the name of the rule.
2. **Rule Description :**Provide the description about the rule.
3. **Process:**Select the Process name in which the rule will work.
4. **Campaign :**Select the name of the Interaction campaign for which the rule will show notification.
5. **Event Type :**Select "Ticket Auto Assigned" as the type of the Event.
6. **Conditions:**Select the target Media profile for which the rule will work.
7. **Actions :**Select "Show Notification to Assignee" from the Action drop-down list.

Ticket Auto-Assigned Event is triggering in the following cases.

-
    - A queue has some pending tickets and the ticket has been auto-assigned to an agent by Auto-Assignment Timer Job.
    - The system has auto-assigned the ticket to a queue and IRM has auto-assigned the ticket to an agent.
    - The incoming mail is auto-assigned to a user according to an existing "Routing" rule.
- **Rule for Ticket Transfer:** This rule helps the agent to show notification whenever a ticket is transferred to the agent. Create a rule with "Ticket Transferred" event. Select "Any" in both "From" and "To" to make sure that the notification is displayed for all kinds of ticket transfer. Select any condition and "Show Notification to Assignee" action. Refer to the following screenshot.

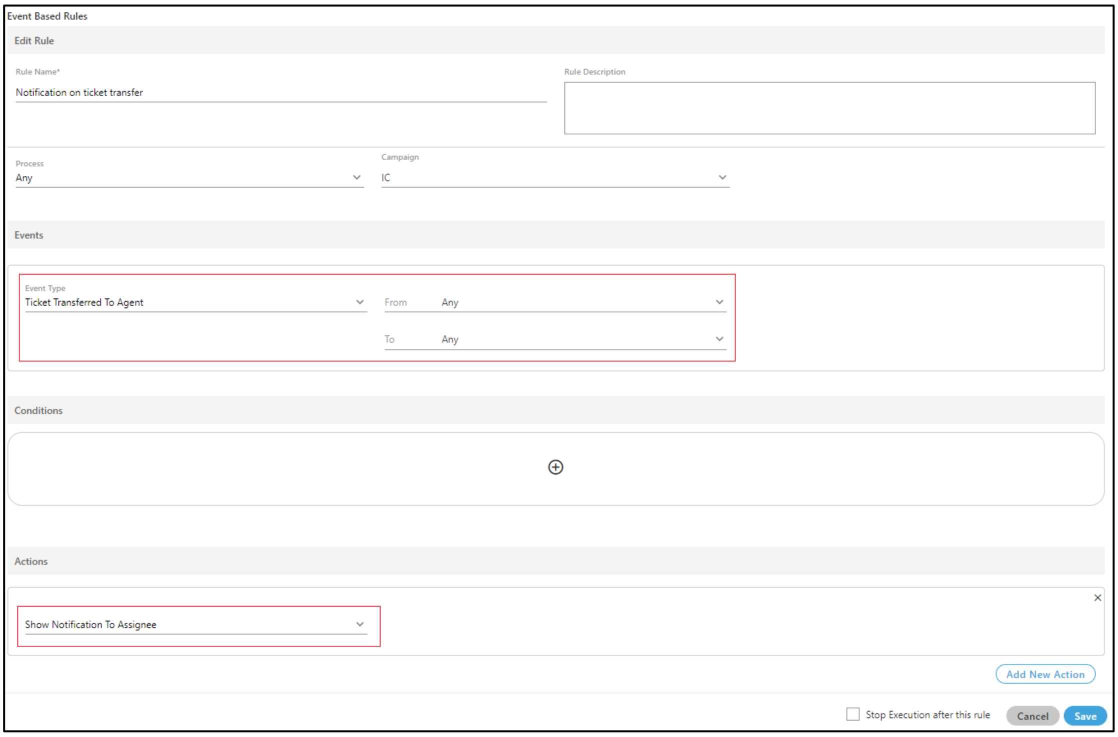


Figure: Rule of Ticket Transferred event to display the ticket assignment notifications

-
    1. **Rule Name :**Enter the name of the rule.
    2. **Rule Description :**Provide the description about the rule.
    3. **Process:**Select the Process name in which the rule will work.
    4. **Campaign :**Select the name of the Interaction campaign for which the rule will show notification.
    5. **Event Type :**Select "Ticket Transferred to Agent" as the type of the Event.
    6. **Conditions:**You can leave the condition blank.
    7. **Actions :**Select "Show Notification to Assignee" from the Action drop-down list.

9.12.4 Time Based Rules

The timer based rules are executed only meeting the selected conditions.

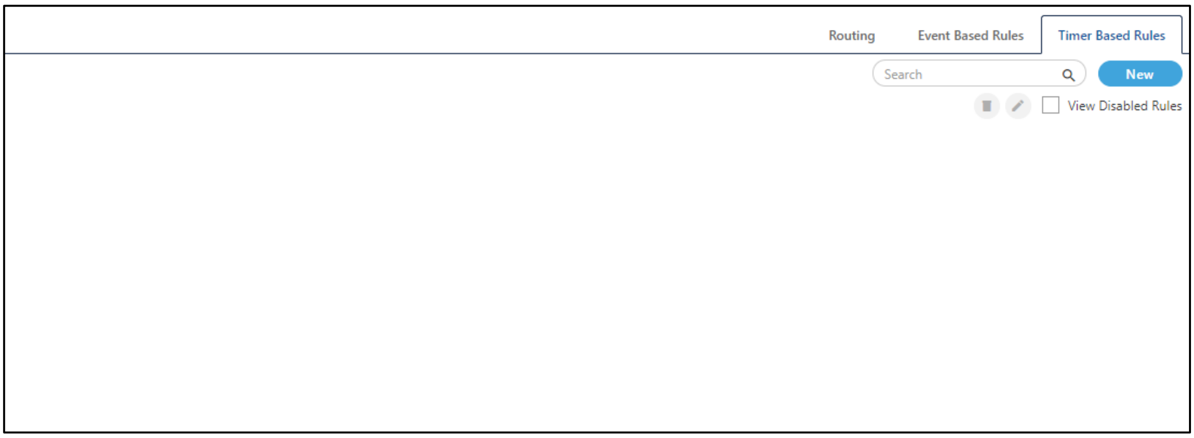


Figure: Timer-based Rules

9.12.4.1 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.

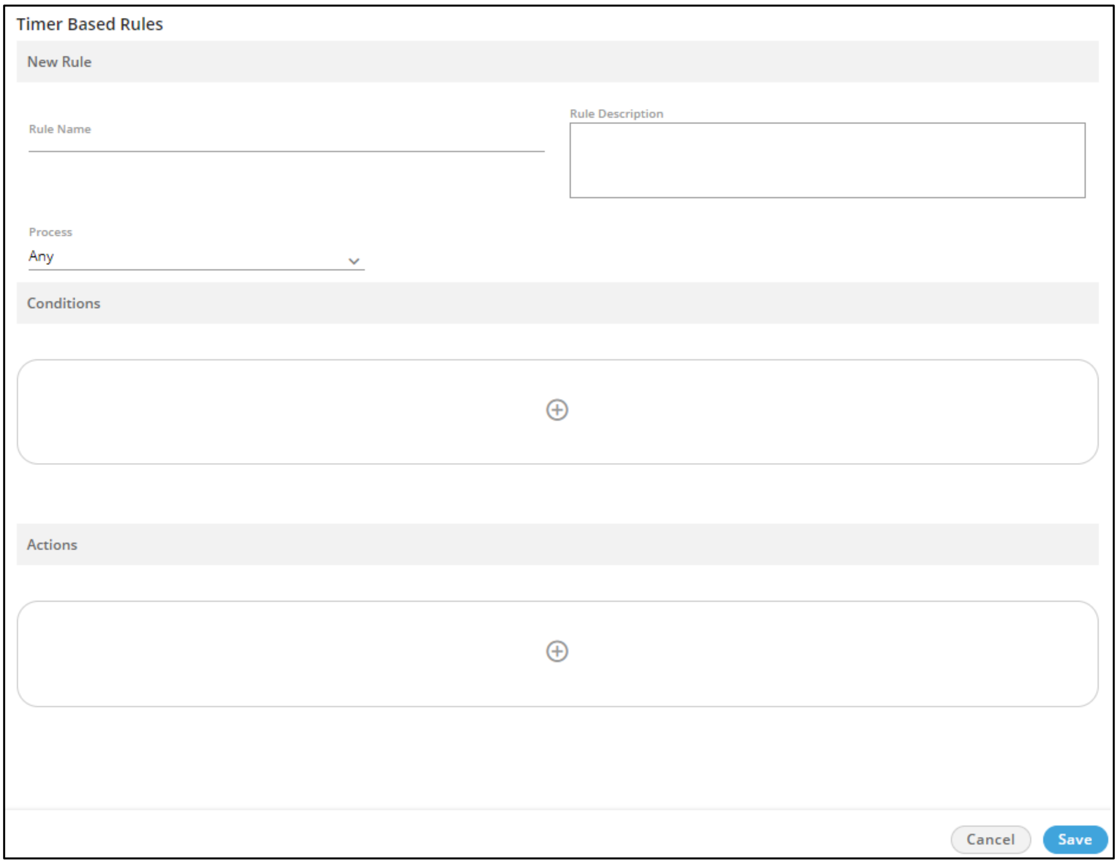


Figure: Add a Timer-based Rule

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.

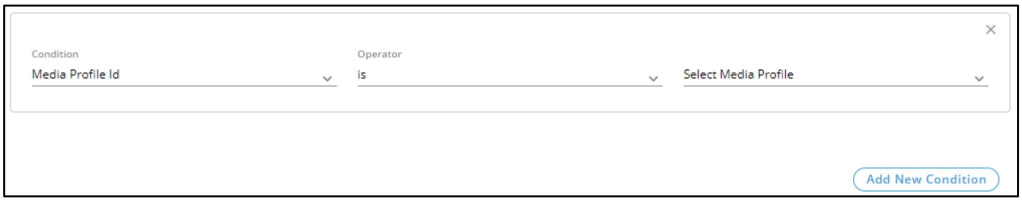


Figure: Add a Condition

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

I. **Queue:** Select it to add a condition based upon "Queue". It contains following operators.

- is
- is not
- greater than
- less than
- Within

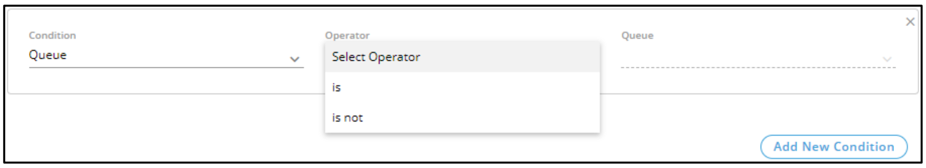


Figure: "Queue" Condition

Select the queue after selecting an operator.

II. **Current Time:** Select it to add a condition based upon "Current Time". It contains following operators.

- is
- is not
- greater than
- less than
- Within

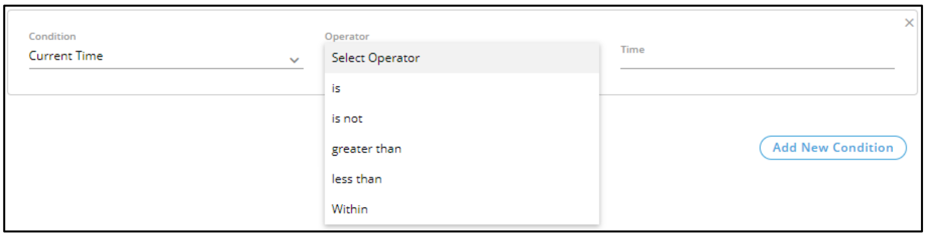


Figure: "Current Time" Condition

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

III. **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

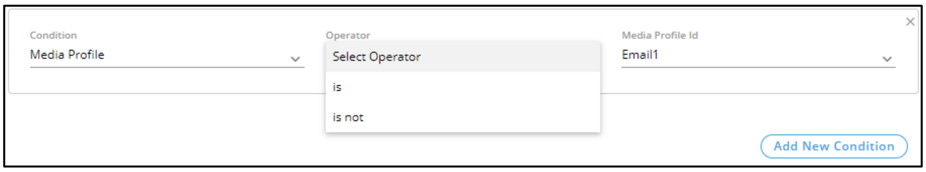


Figure: Condition for Media Profile

Select a media profile ID after selecting an operator.

IV. **Subject:** Select it to add a condition based upon the subject. It contains following operators.

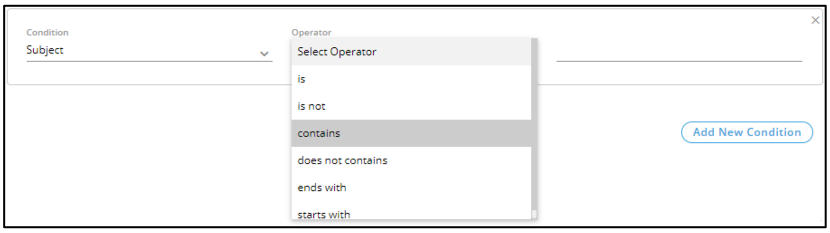
- is
- is not
- contains
- does not contain
- ends with
- starts with
- 

Figure: Subject Condition

V. After selecting an operator, provide a value in the adjoining text field.

VI. **Requester Email:** Select it to add a condition based upon the requester email address. It contains following operators.

- contains
- does not contain

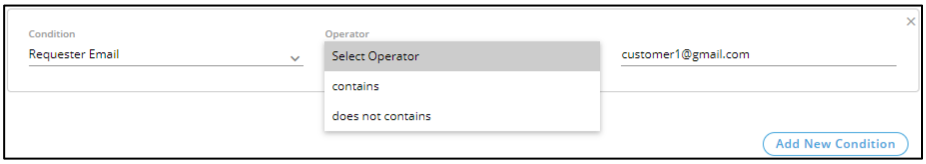


Figure: "Request Email Address" Condition

After selecting an operator, provide a value in the adjoining text field.

VII. **Email CC:** Select it to add a condition based upon the email address in CC field. It contains following operators.

- contains
- does not contain

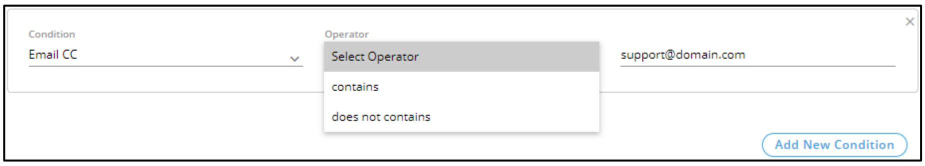


Figure: "Email CC" Condition

After selecting an operator, provide a value in the adjoining text field.

VIII. **Ticket Status:** Select it to add a condition based upon "Ticket Status". It contains following operators.

- is
- is not

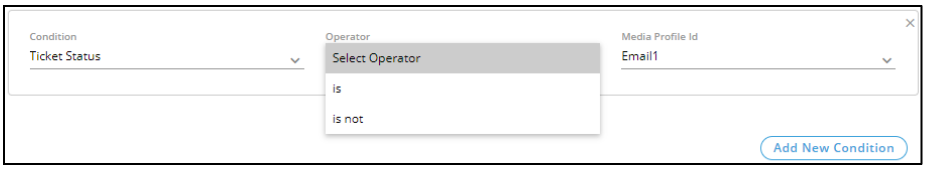


Figure: "Ticket Status" Condition

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

IX. **Priority:** Select it to add a condition based upon "Priority". It contains following operators.

- is
- is not

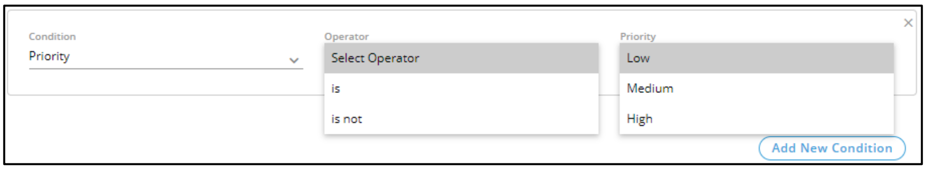


Figure: "Priority" Condition

Select an operator and then select a priority value.

X. **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

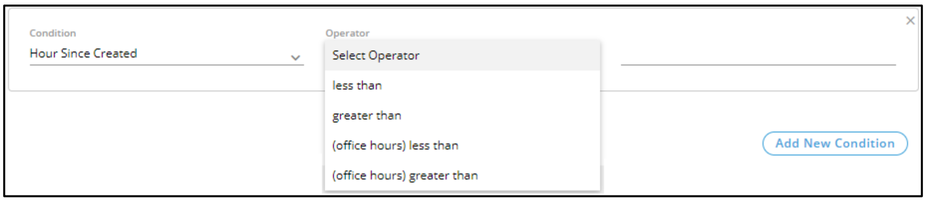


Figure: "Hours Since Created" Condition

Select an operator and provide a value.

XI. **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

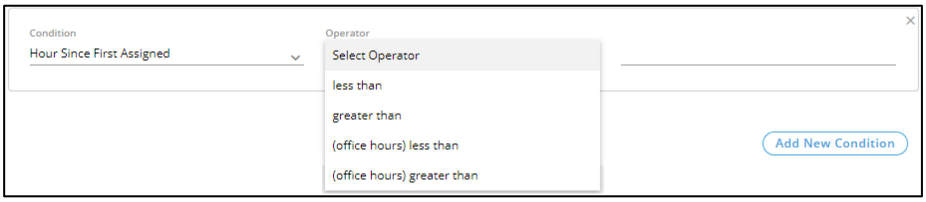


Figure: "Hours Since First Assigned" Condition

Select an operator and provide a value.

XII. **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

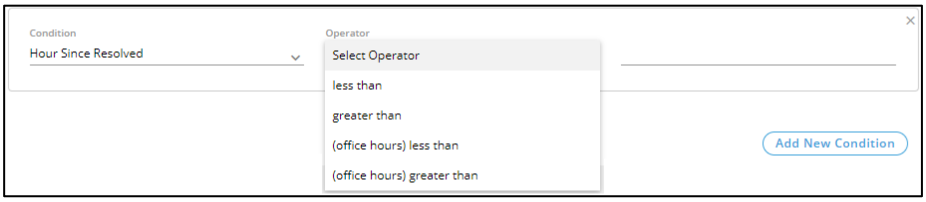


Figure: "Hours Since Resolved" Condition

Select an operator and provide a value.

XIII. **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

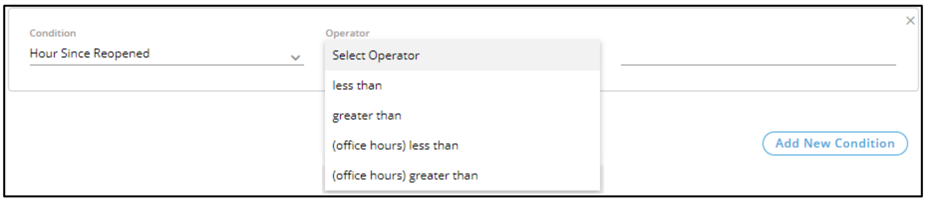


Figure: "Hours Since Reopened" Condition

Select an operator and provide a value.

XIV. **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

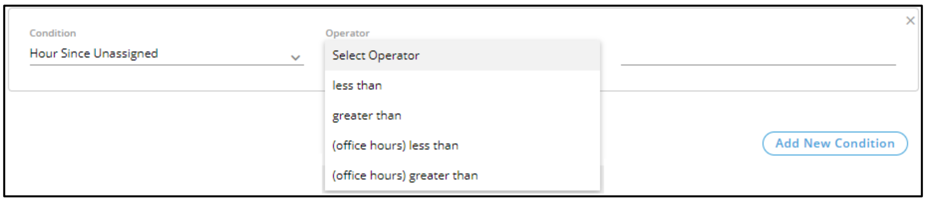


Figure: "Hours Since Unassigned" Condition

Select an operator and provide a value.

XV. **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

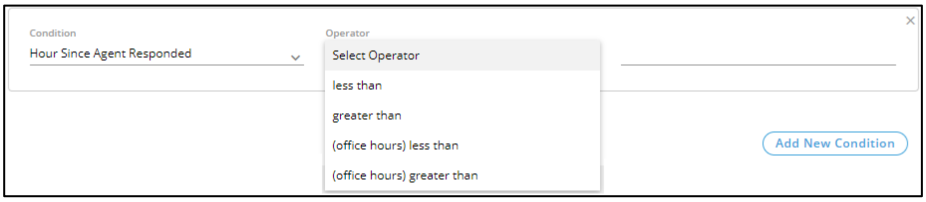


Figure: "Hours Since Agent Responded" Condition

Select an operator and provide a value.

XVI. **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

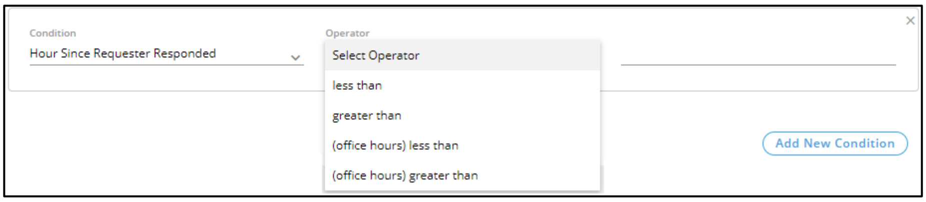


Figure: "Hours Since Requester Responded" Condition

Select an operator and provide a value.

XVII. **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

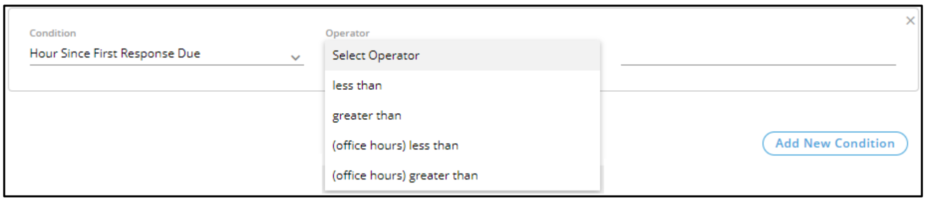


Figure: "Hours Since First Response Due" Condition

Select an operator and provide a value.

XVIII. **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

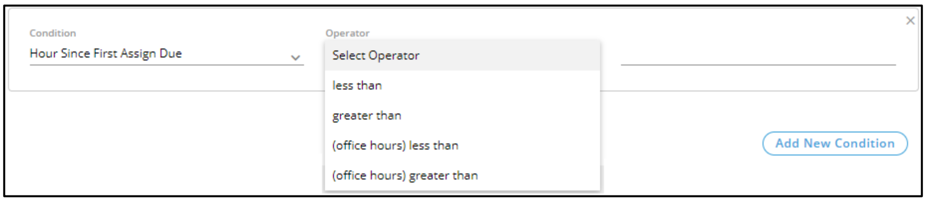


Figure: "Hours Since First Assign Due" Condition

Select an operator and provide a value.

XIX. **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

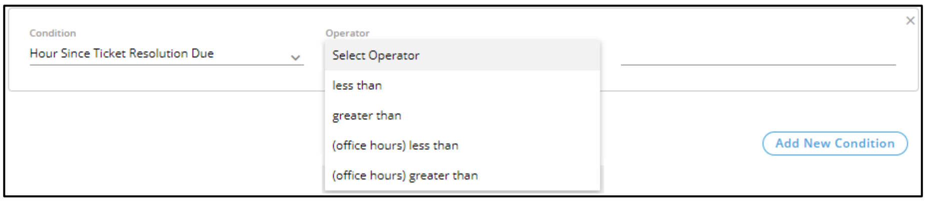


Figure: "Hours Since Ticket Resolution Due" Condition

Select an operator and provide a value.

XX. **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

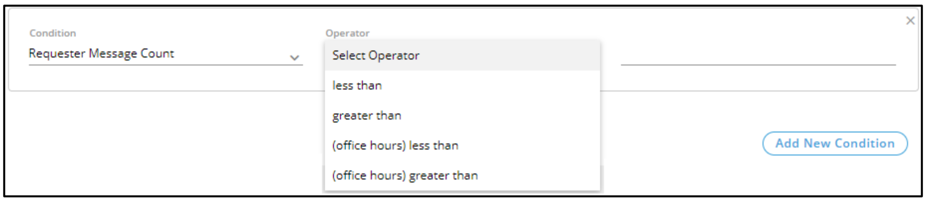


Figure: "Requester Message Count" Condition

Select an operator and provide a value.

XXI. **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

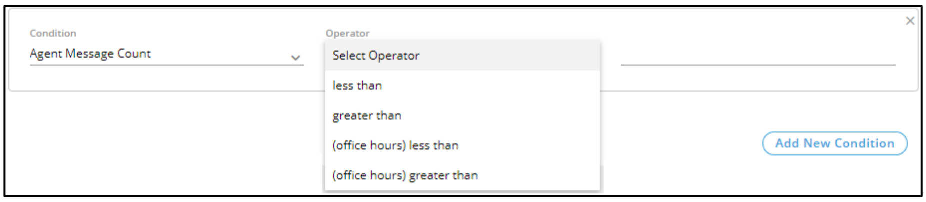


Figure: "Agent Message Count" Condition

Select an operator and provide a value.

XXII. **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

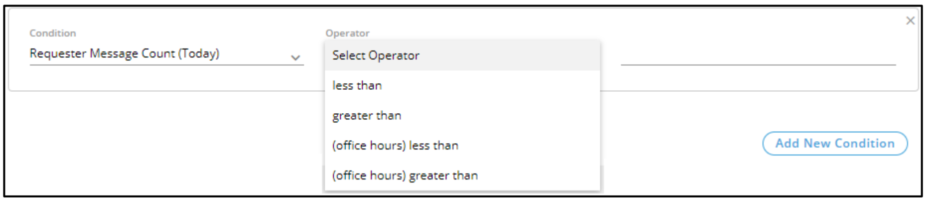


Figure: "Requester Message Count (Today)" Condition

Select an operator and provide a value.

XXIII. **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

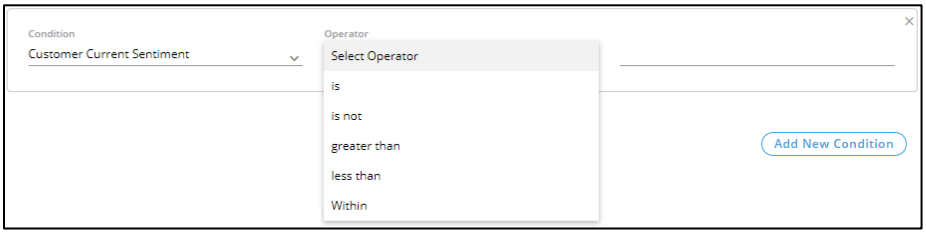


Figure: "Customer Current Sentiment" Condition

Select an operator and provide a value.

XXIV. **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

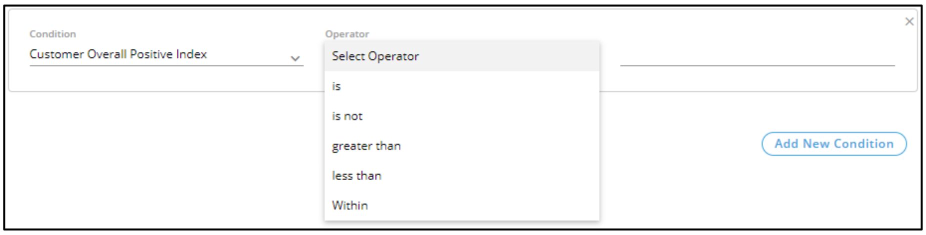


Figure: "Customer Overall Positive Index" Condition

Select an operator and provide a value.

XXV. **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

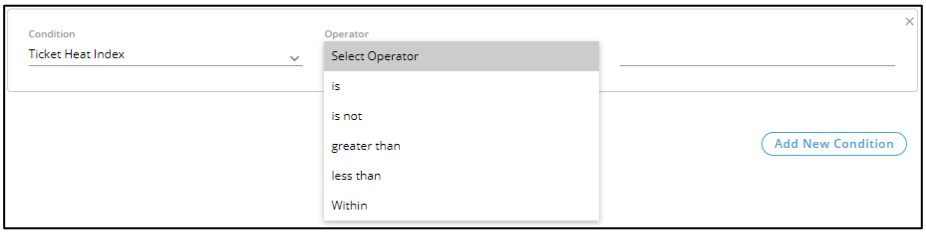


Figure: "Ticket Heat Index" Condition

Select an operator and provide a value.

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

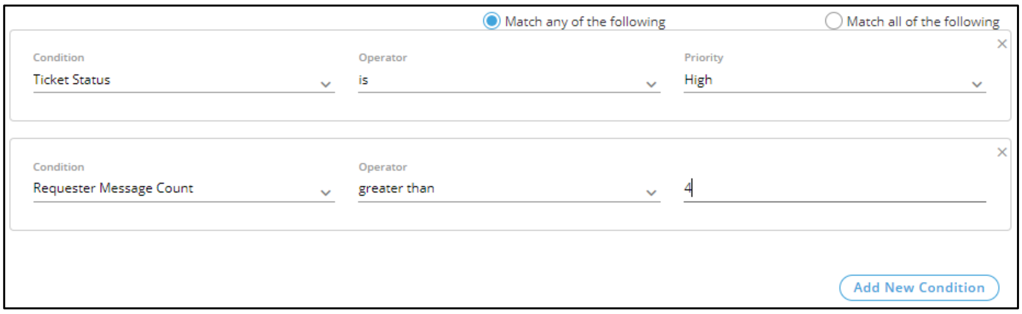


Figure: Multiple Conditions

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 match any of the conditions. The rule will be applied if one or more conditions are being matched.
- **Match all of the following:** Select this option to match all conditions collectively. The Rule will be applied only when all conditions are being matched, else the rule will not be applied.

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

6. **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.

6.

A.

I.

II. **Assign Ticket to Agent:** Select it to assign those tickets to the selected agent which meets the pre-selected conditions.

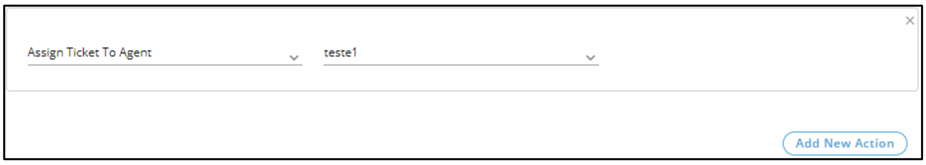


Figure: Send Email To All Supervisors

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 ticket to the agent who is available.
- Agent Available to Take Tickets: Select it to transfer the ticket to any of the agents, who are available to take the ticket.
- Any Agent: Select it to transfer the ticket to any agent randomly irrespective of its availability status.

IV. **Escalate Ticket:** Select it to escalate the tickets which meets the pre-selected conditions.

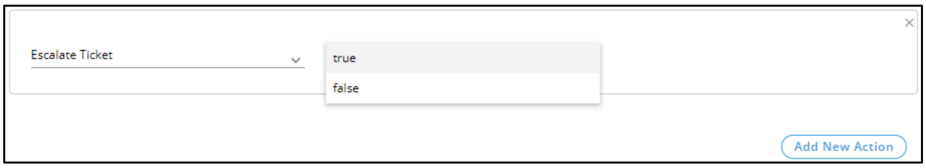


Figure: Escalate Ticket

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.

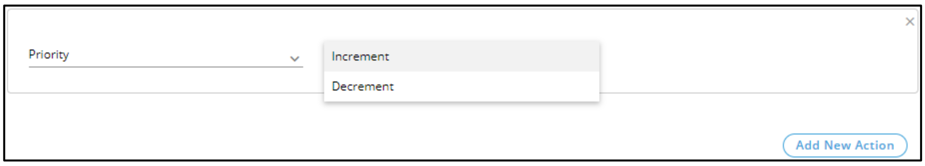


Figure: "Priority" Action

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.

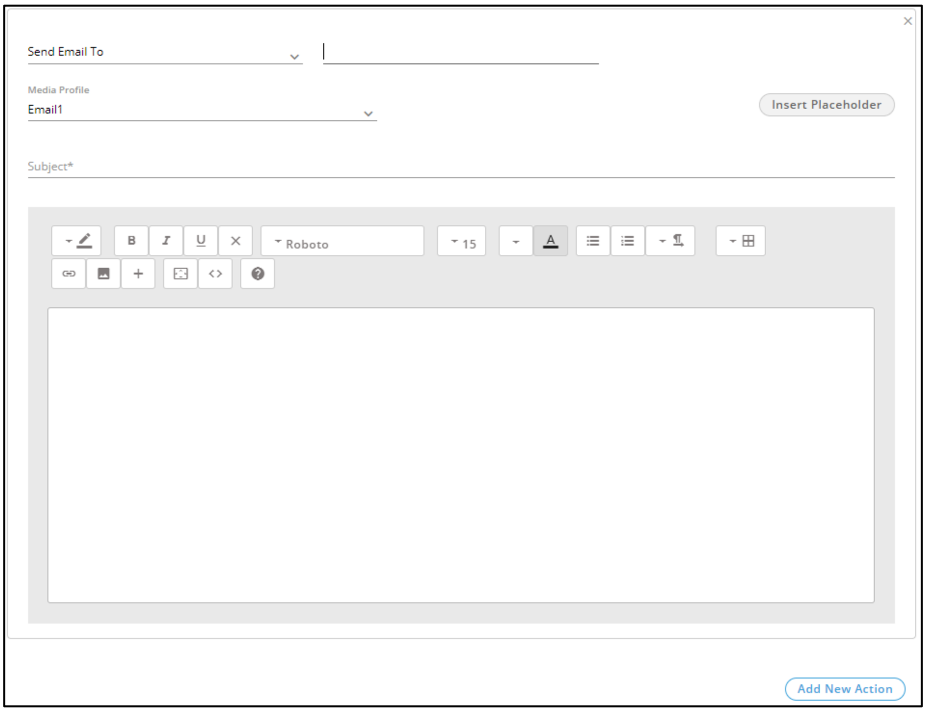


Figure: Send Email To Action

- 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.

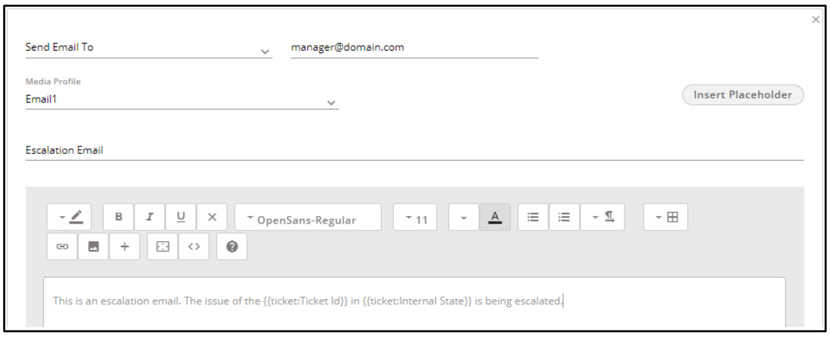


Figure: Sample Email

VII. **Send Email To Agent:** Select it to send an email to the selected agent for those tickets which meets the pre-selected conditions.

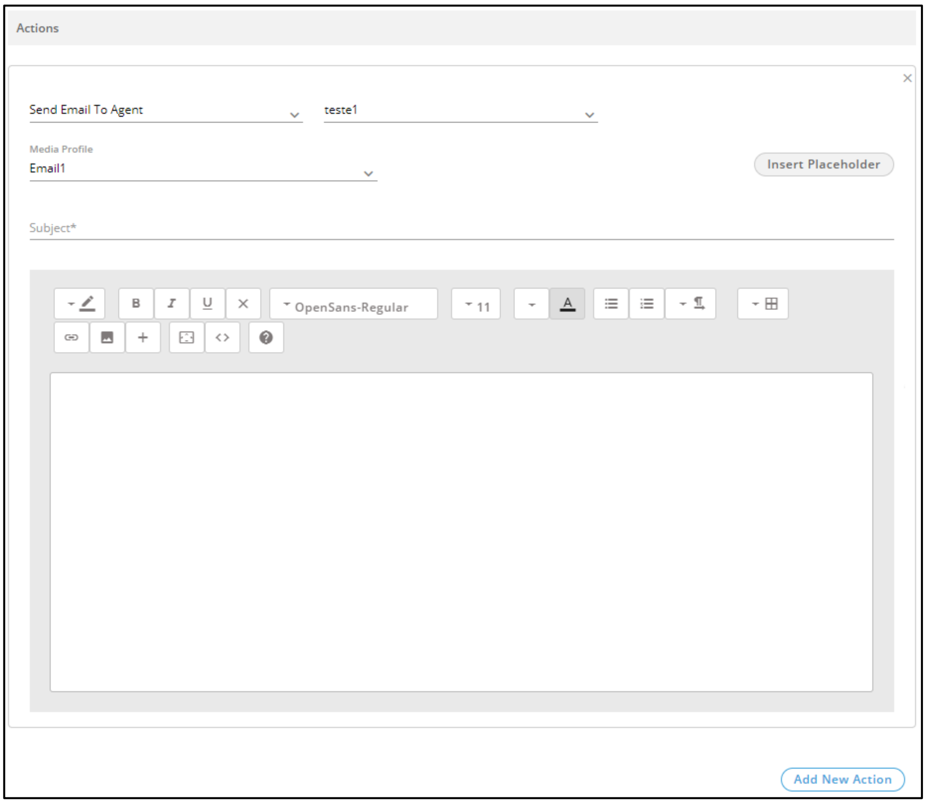


Figure: Send Email To Agent

- 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.

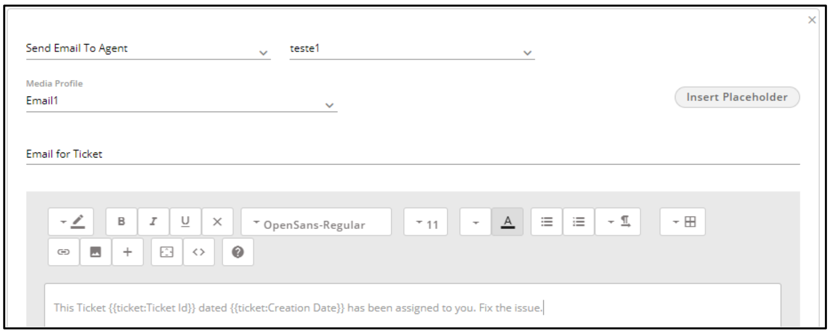


Figure: Sample Email

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.

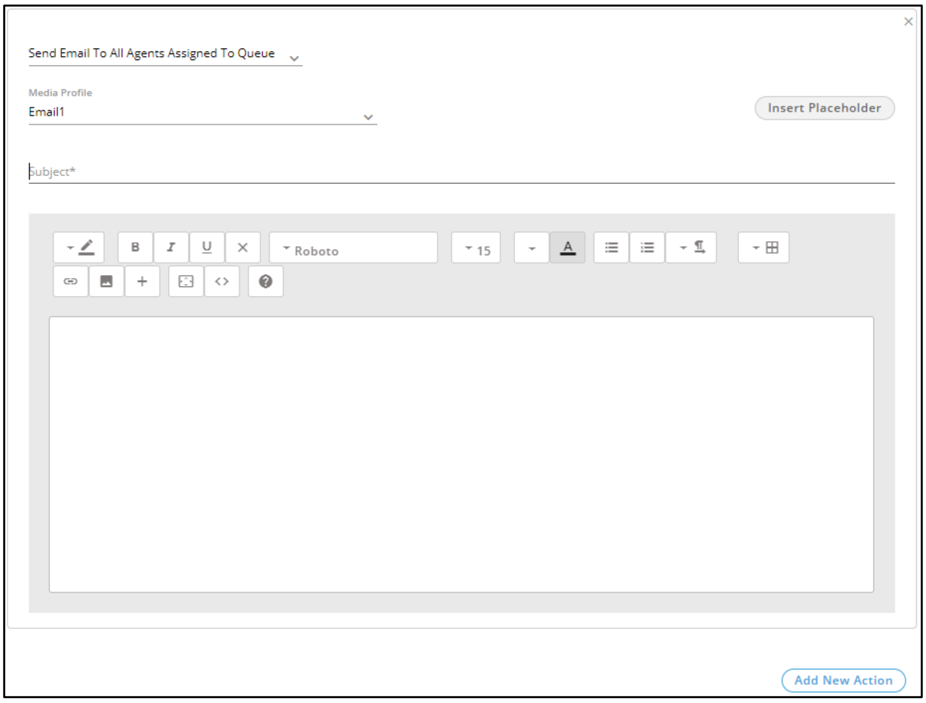


Figure: Send Email To All Agents Assgined to the Queue

- 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.

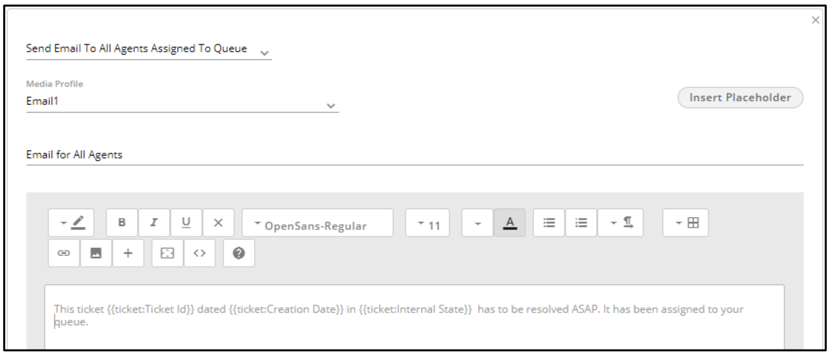


Figure: Sample Email

IX. **Send Email To Requester:** Select it to send an email to the requester for those tickets which meets the pre-selected conditions.

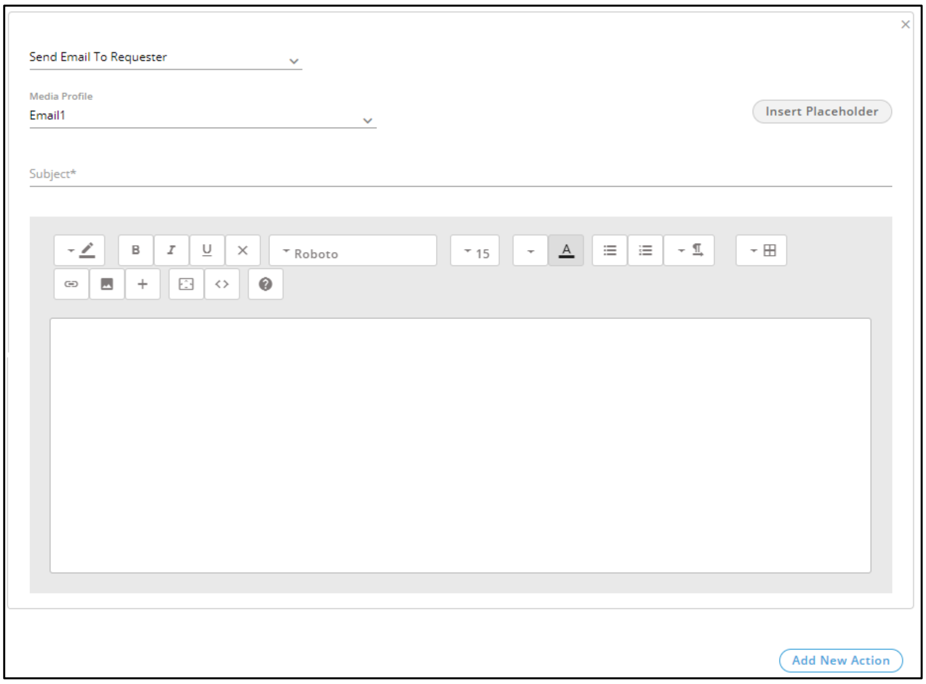


Figure: Send Email To Requester

- 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.

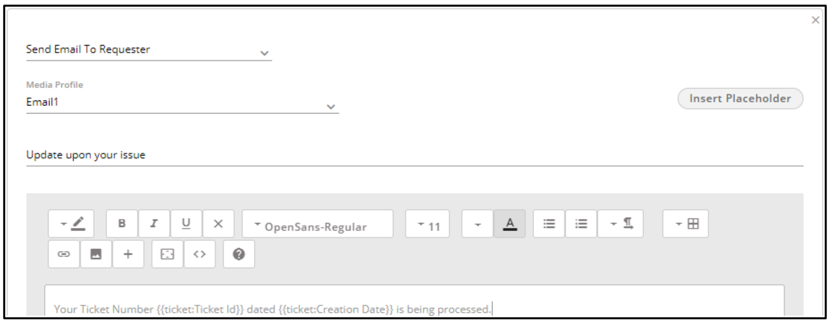


Figure: Sample Email

X. **Send Email To All Supervisors:** Select it to send an email to all supervisors for those tickets which meets the pre-selected conditions.

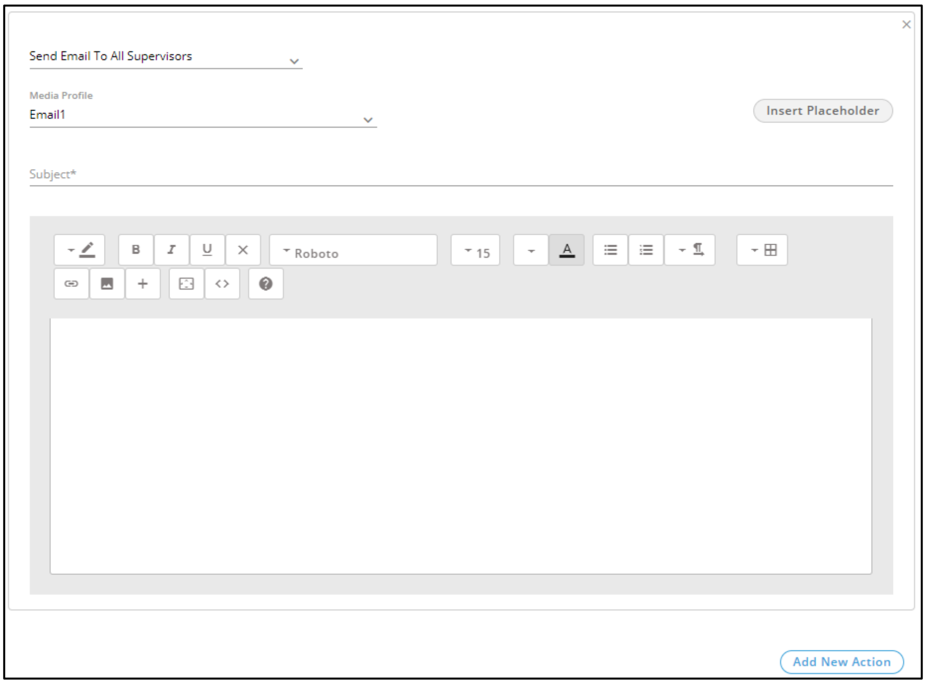


Figure: Send Email To All Supervisors

- 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.

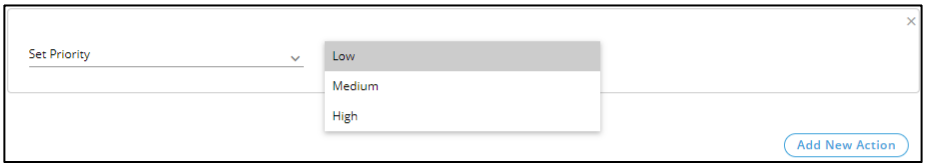


Figure: "Set Priority" Action

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.

B. **Set Custom Field Using HTTP Action Response:** Select it to allow to ask an external system to update the custom field and as a result thereof, take any additional action upon the creation or modification of a ticket.

When a custom field is hidden then also custom field is getting update, checked from the backend. And able to search the same from the advance filter even custom field is hidden for that ticket.

Sample JSON Formats

The required sample JSON formats for the following custom fields for integer, boolean, and string values, which has to be generated, after calling the API of the third-party external system are also provided.

6.

A.

- Single-Selection List Box
- Multi-Selection List Box
- Single Line Field
- Checkbox
- Radio Button
- Dependent Single Selection List Box

Following is the database entry of a single Selection List Box.

```
custom_field_id          | d625-5d094290-cf-0
column_name              | CB
contact_center_id        | 1
custom_field_data_type   | String
custom_field_name        | SSLB
custom_field_type        | SingleSelectionListBox
default_value            |
possible_values          | ["1","2","3","4","['k']"]
process_id               | 2
is_required              | f
is_searchable            | f
```

```
                                custom_field_category_id | 2
                                date_added               | 2019-06-
19 01:40:08.397
                                date_modified            | 2019-06-
26 20:51:12.223
                                mandatory_on_creation    | f
                                is_editable              | t
```

The required output from the Sample API stored in the AppServer to modify the above SingleSelectionListBox using "HTTP Response Data" should be in the following format.

JSON for Integer Type:

{d625-5d094290-cf-0:2}

JSON for String Type

{d934-5d0229ef-cf-0:\"Payment Query\"}"

The required output from the Sample API stored in the AppServer to modify the multiple Custom Fields in a ticket using "HTTP Response Data" should be in the following format.

JSON to update multiple Custom Fields

{d119-5d134249-cf-2:[1.1,1.2],d119-5d134249-cf-1:[\"string1\",\"string2\",\"string3\",\"string4\"]}

9.12.4.2 Example of Third-Party API

Following is the sample API that will be called in the test case created for this story.

```
<?php
echo "{d581-5d0a3128-cf-0:{\"Country\":\"New Zealand\",\"State\":\"Zero\"}}";
?>
```

9.12.4.3 Steps to create a HTTP Response to update a Custom Field using above Sample API

Perform the following steps.

6.

A.

I. The Administrator has to create or modify a Routing Rule, Event-based Rule, or Timer-based Rule.

II. Select "GET" as the method.

III. In URL, provide the URL at which the Sample API is stored in Ameyo AppServer.

IV. Select "HTTP Action" as the first action in "Actions".

V. Select "Post-Request Script" tab and provide the following JavaScript Code.

variables.put("$thridPartyCustomFieldData",responseString);

The above code has to be used as-it-is in whenever you want to update the Custom Field using HTTP Response.

VI. Now, click "Add New Action" button in the right corner.

VII. Select "Set Custom Field Using HTTP Action Response" in the new action. Refer to the following screenshot.

Figure: New Action for HTTP Response

VIII. Click "Save".

7. Following is a sample screenshot containing an Timer-Based Rule with sample details.

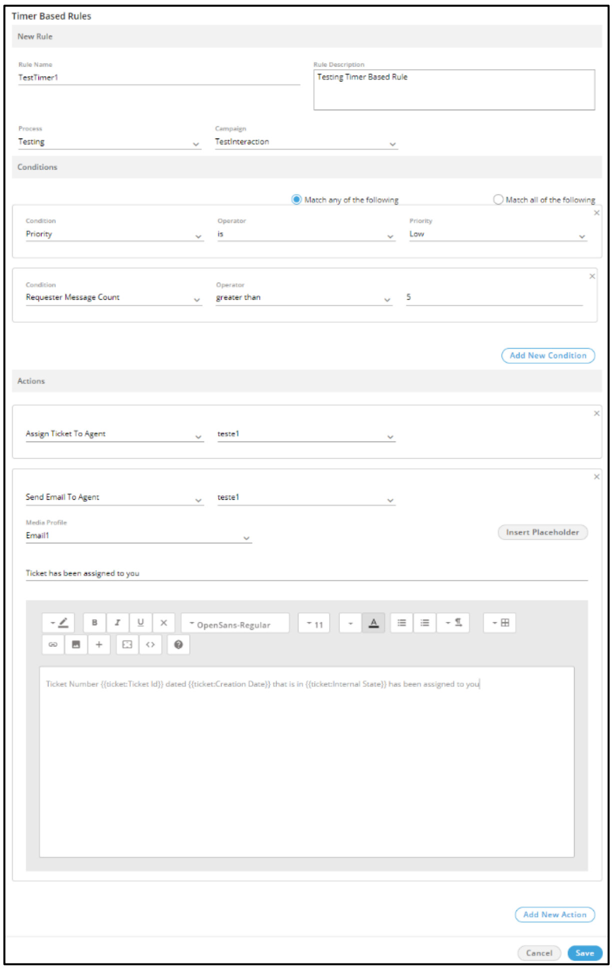


Figure: Timer-based Rule

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.

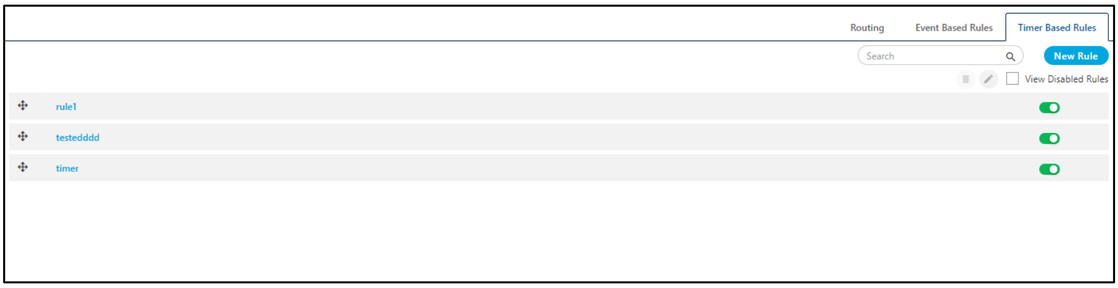


Figure: Added Multiple Timer-based Rules

9.12.4.4 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.

9.12.4.4.1 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.

9.12.4.4.2 View Disabled Rules

Click to check "View Disabled Rules" box to view its details.

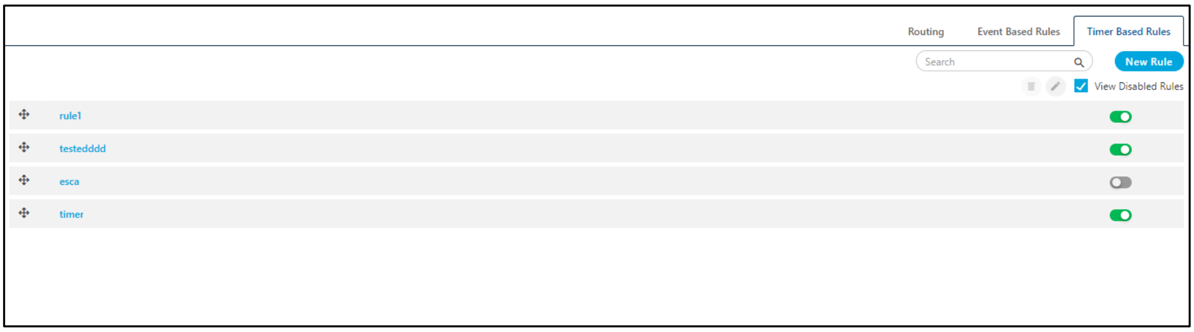


Figure: Displaying the Disabled Rule

9.12.4.4.3 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.

9.12.4.5 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.

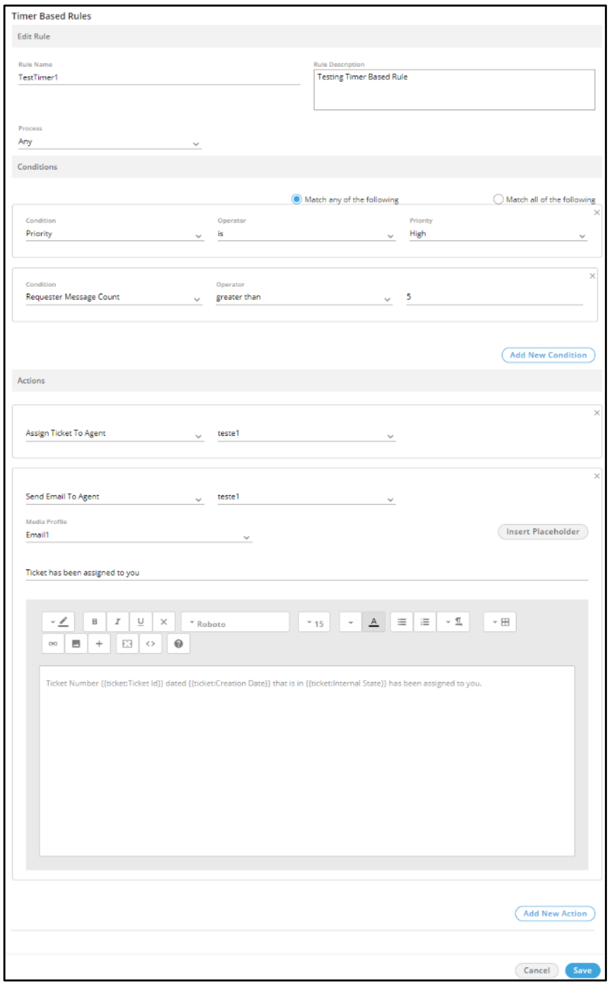


Figure: Edit a Timer-based Rule

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.

9.12.4.6 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.

9.13 Ticket Status

This tab lets you define the External States of Tickets in the default Internal States of Tickets.

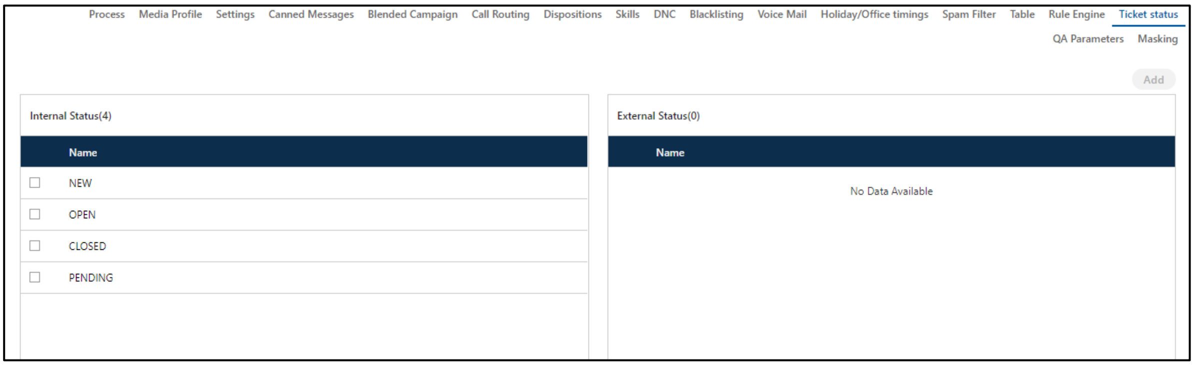


Figure: Ticket Status Tab

Following are the default internal states.

1. **New:** It specifies the new tickets.
2. **Open:** It specifies the open tickets.
3. **Closed:** It specifies the closed tickets.
4. **Pending:** It specifies the pending tickets.

Do not create the external states with the same names of internal states to avoid any issue.

9.13.1 Create an External Status

Perform the following steps.

1. Click the checkbox of an internal status to select it. "Add" button will be activated in "External Status" column.
2. Click "Add" button. It shows the following pop-up.

Figure: Create New External Status

3. Provide a name for the new external status.

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 Status.

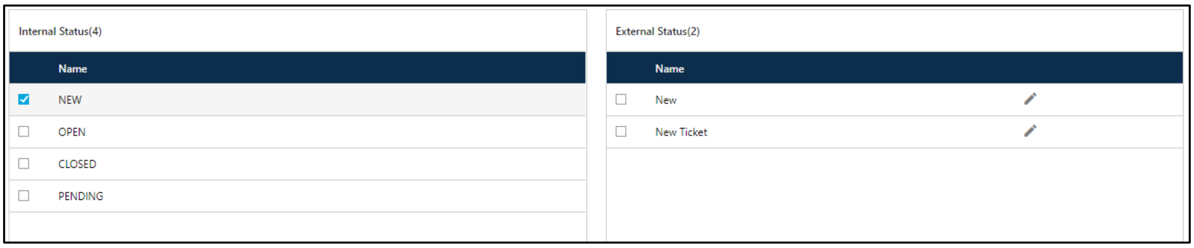


Figure: Created Multiple External States in "New"

9.13.2 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

9.13.3 Edit an External Status

Perform the following steps to edit an External Status.

1. Check the box of an internal status. It lists all of its external states.
2. Click icon to edit it using the following pop-up.

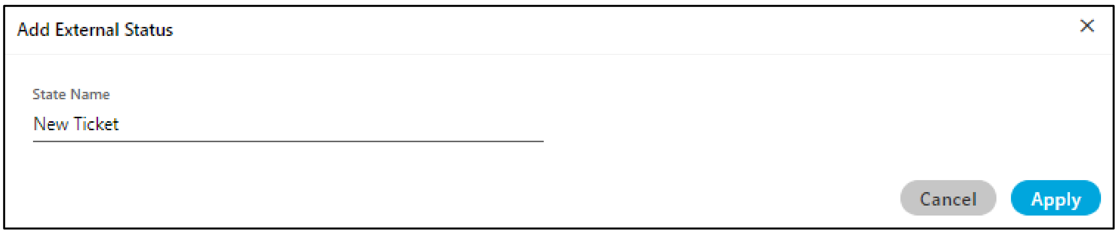


Figure: Edit External Status

3. You can change the name of External Status here.

4. Click "Apply" to make the changes.

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

9.13.4 Delete an External Status

Perform the following steps to delete an external status.

1. Check the box of an internal status. It lists all of its external states.

2. Check the box of an external status and click button. It shows a warning message before deleting the external status.

Figure: Warning before deleting an External Status

3. Click "OK" to delete the external status.

   Rather, you can click "Cancel" to not delete it.

9.14 Masking

An organization may want to make the phone numbers of their customers confidential in the order to hide them from its agents. In such a case number masking helps to hide the phone number of the customers and does not allow the users to view the phone numbers of the customers. As per the requirements of IT Regulatory Compliance and industry, consumers' personal details such as phone numbers should be hidden. If not hidden, then the identifiable information like phone number should be anonymized or masked so that no one can recognize and use it for purposes other than for which the consumers have given their consent.

Number Masking is available for the Voice only instead of Fusion.

The masking tab allows Administrator to enable/disable the Masking for all available user roles, user interface, reports, VLA, and the backend.

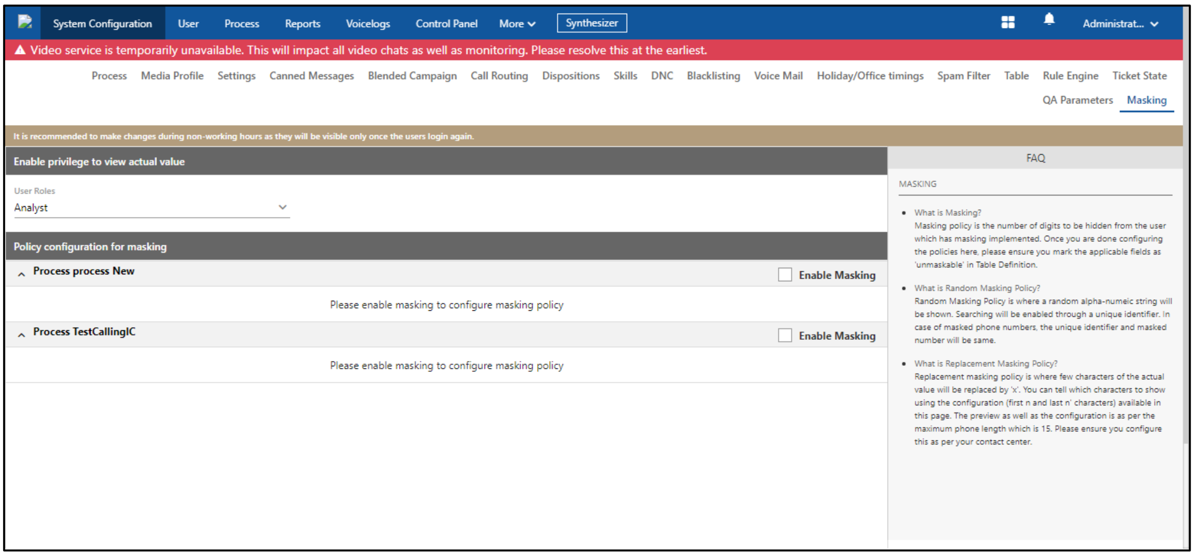


Figure: "Masking Tab" in "System Configuration"

9.14.1.1 Enable Privilege to view the Actual number for the User Roles

There can be some cases where a particular user, like Supervisor, Group Manager, or Analyst, needs the privilege to verify the actual phone number to which the contact is being established. In such cases, the Administrator can use "Masking" Tab to give privileges to view the actual value to some particular user roles.

We recommend using this option cautiously.

The Administrator can select any or multiple of the following user roles to give them the privilege to view the actual value, that is, the unmasked value.

- Analyst

- Executive
- Group Manager
- Professional Agent
- Supervisor

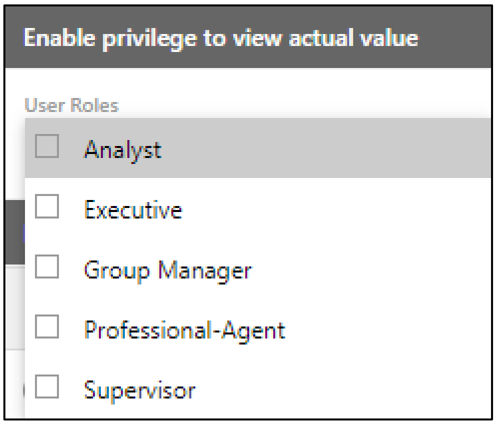


Figure: List of User Roles

9.14.1.2 More about Masking Tab

Masking can be enabled at the Process-level. It means the Administrator can enable the Masking for one Process and disable it for another process as per the business need. If the masking is enabled for a process, then it will remain enabled for all campaigns in that process.

The changes in Masking Policy, such as enabling, disabling, or making another modification, will be visible only when the user login again to the Ameyo Application Server. Therefore, we recommend making changes in the Masking only in the non-working hours so that it does not impact the business operations. Even the following message is displayed on top in "Masking" tab.

It is recommended to make changes during non-working hours as they will be visible only once the user login again.

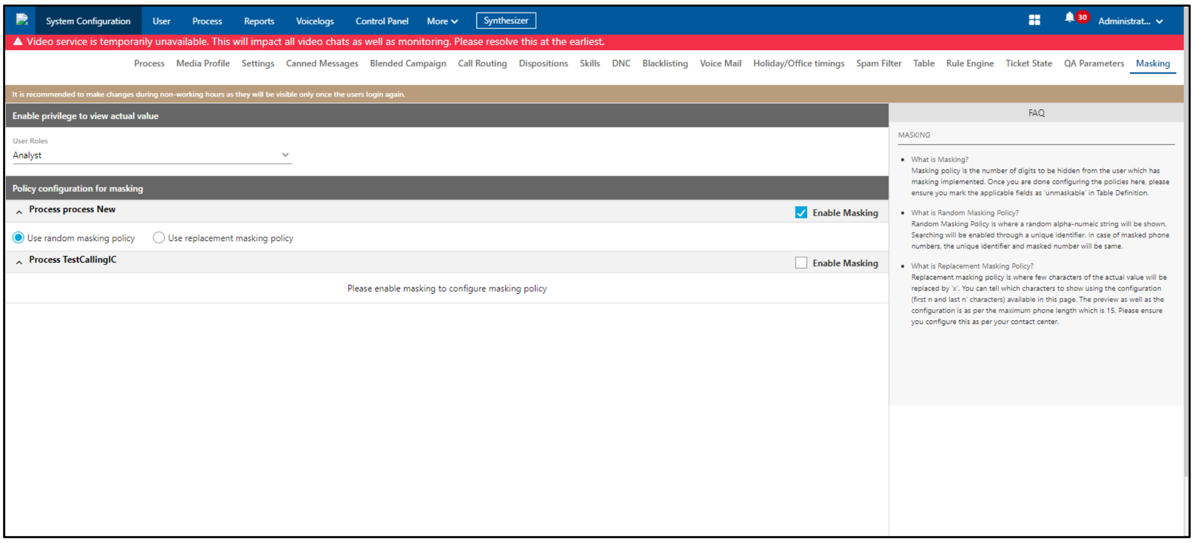


Figure: Type of Masking Policies in "Masking Tab"

Once masking is enabled for a process, the Administrator has to select any of the following options.

- **Use random masking policy:** In the Random Masking Policy, the random alphanumeric string is displayed instead of the phone number.
- **Use replacement masking policy:** In the Replacement masking policy, few characters of the actual value will be replaced by 'x'. The user can define which characters to show using the configuration (first n and last n' characters) available on this page. The preview and configuration are as per the maximum phone length, which is 15. However, it has to be ensured that this is configured as per the requirements.

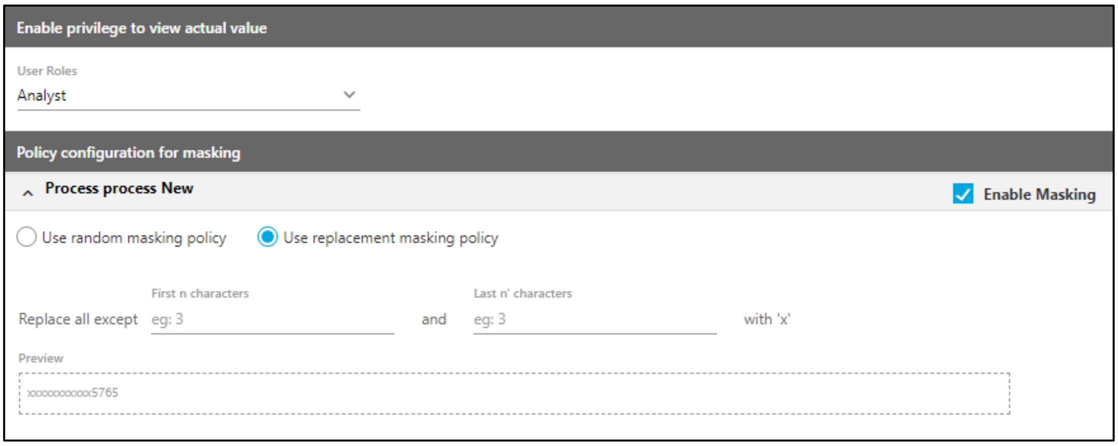


Figure: Options of Replacement Number Policy

Here, the (n) represents the length of the starting characters, and (n') represents the length of the last characters of the number that will not be masked

In the following screenshot, the first 3 and last 3 digits of the numbers are masked.

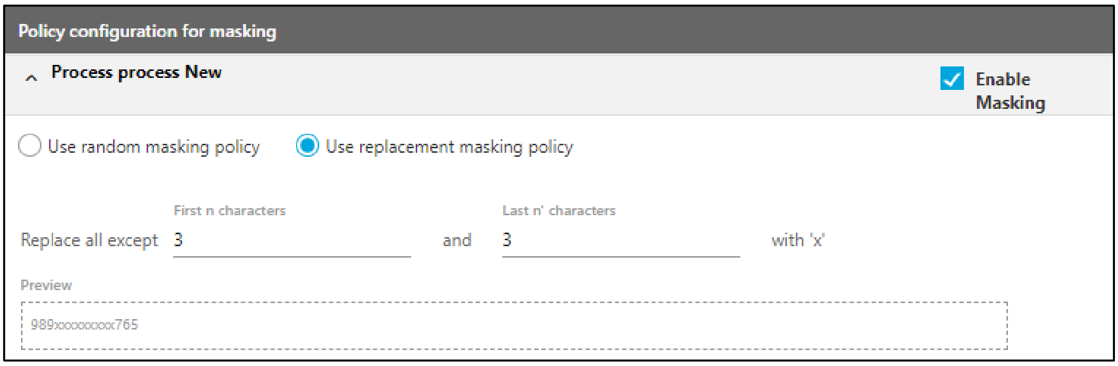


Figure: Sample Masking

The sum of both first characters (n) and the last characters (n') should not be more than 15. If it is more than 15, then an inline error is displayed.

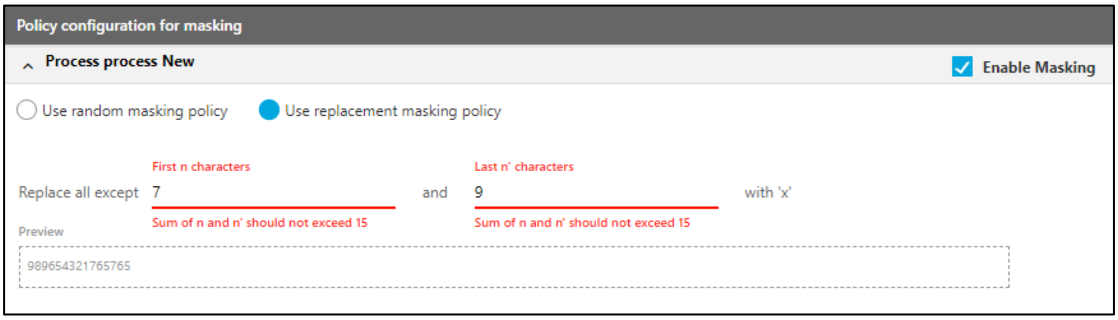


Figure: Inline Error Message when the total is more than 15

The searching will be enabled through a unique identifier. In the case of the random masking policy, the unique identifier and masked number will be the same.

The Administrator can click "Apply" to apply the masking policies. If the phone numbers are masked once using this Masking Policy, then they cannot be unmasked.

10. 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.

10.1.1 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 <Ameyo_Database_Name>

INSERT into server_preference_store(context_type,context_id,key,value) VALUES ('contactCenter','<contact_Center_Id>','callManagerSlot','<Protocol>//<Domain_Name_OR_IP_os_Server>:<PORT_Number>/app/build');

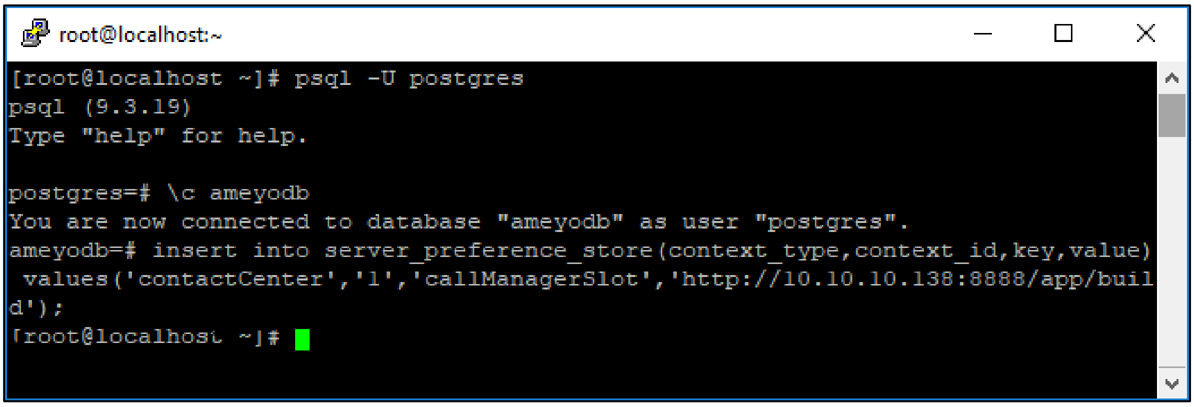


Figure: Commands to enable Call Manager

Now, go to "System" → "System Configuration" → "Settings" → "System Settings". Scroll down and click "Reload" button for "Reload Server Preference Store" to enable "Call Manager" tab on Administrator Console.

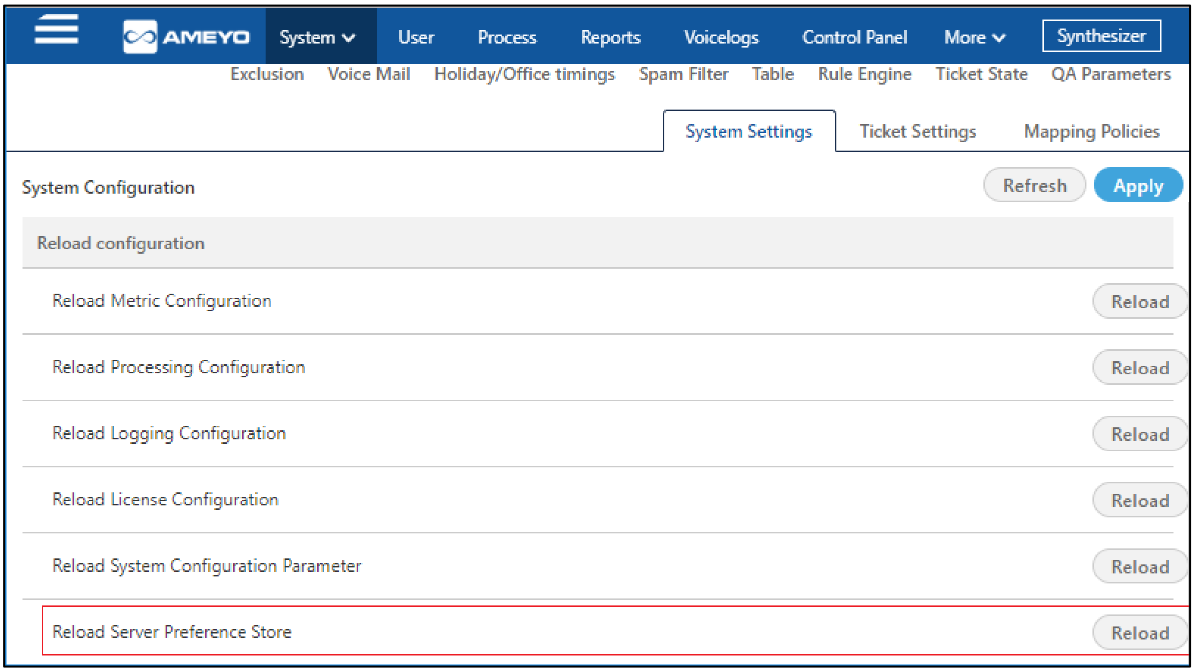


Figure: Reload Server Preference Store

After reloading the Table, now re-login to Administrator Console to view Call Manager tab.

After relogin, go to More → Call Manager to view the Call Manager app. The following two sub-tabs are present here.

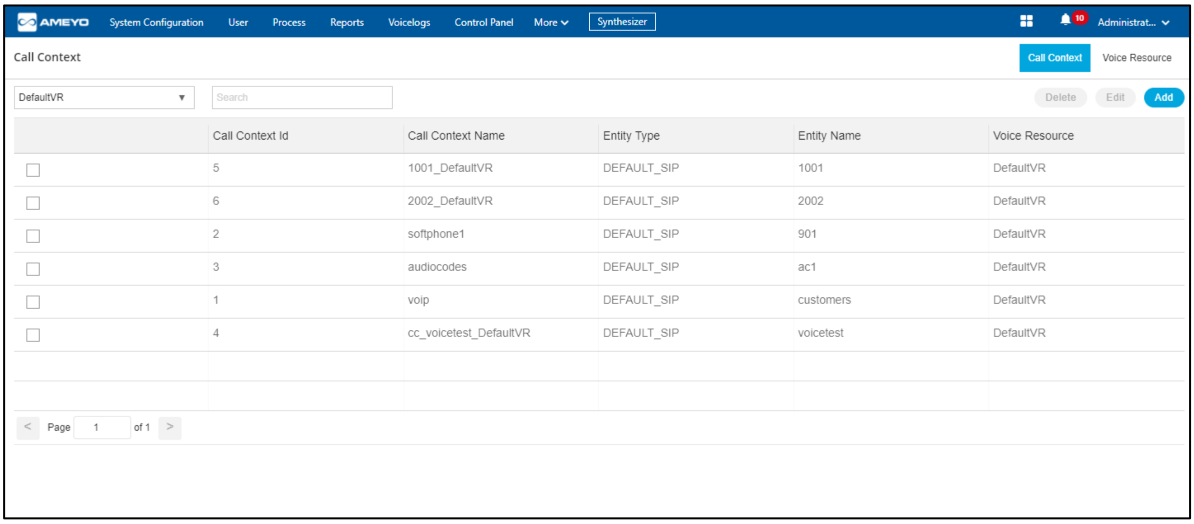


Figure: Call Manager Tab in Administrator Interface

1. Call Context Tab
2. Voice Resource Tab

10.2 Call Context Tab

Call context is basically the SIP channel that will be used by the agent to initiate the calls.

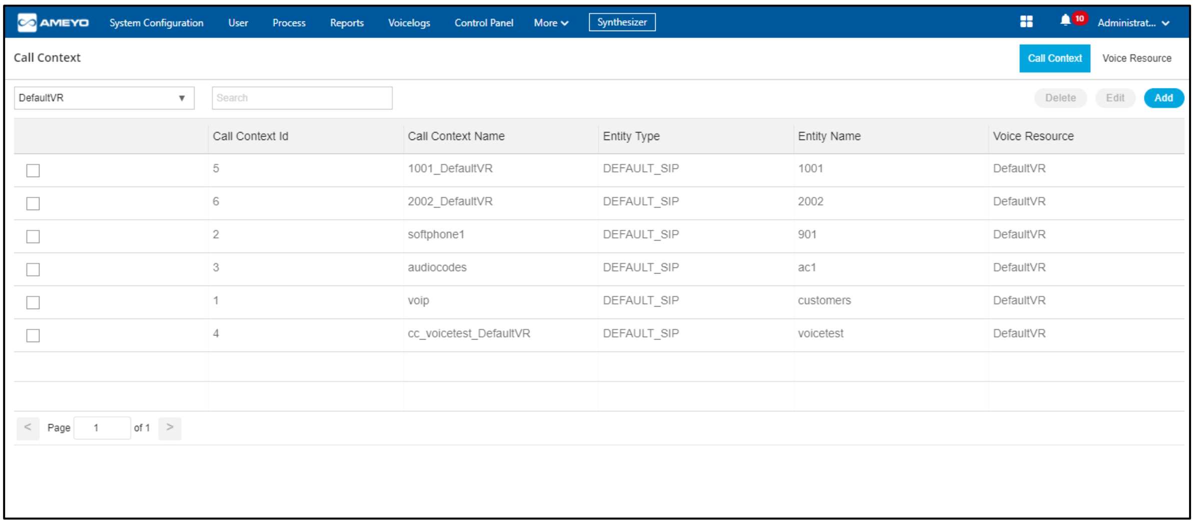


Figure: Call Context Tab

10.2.1.1 Add a Call Context

Perform the following steps to add a Call Context.

1. Click "Add" to add a call context. The following page is displayed.

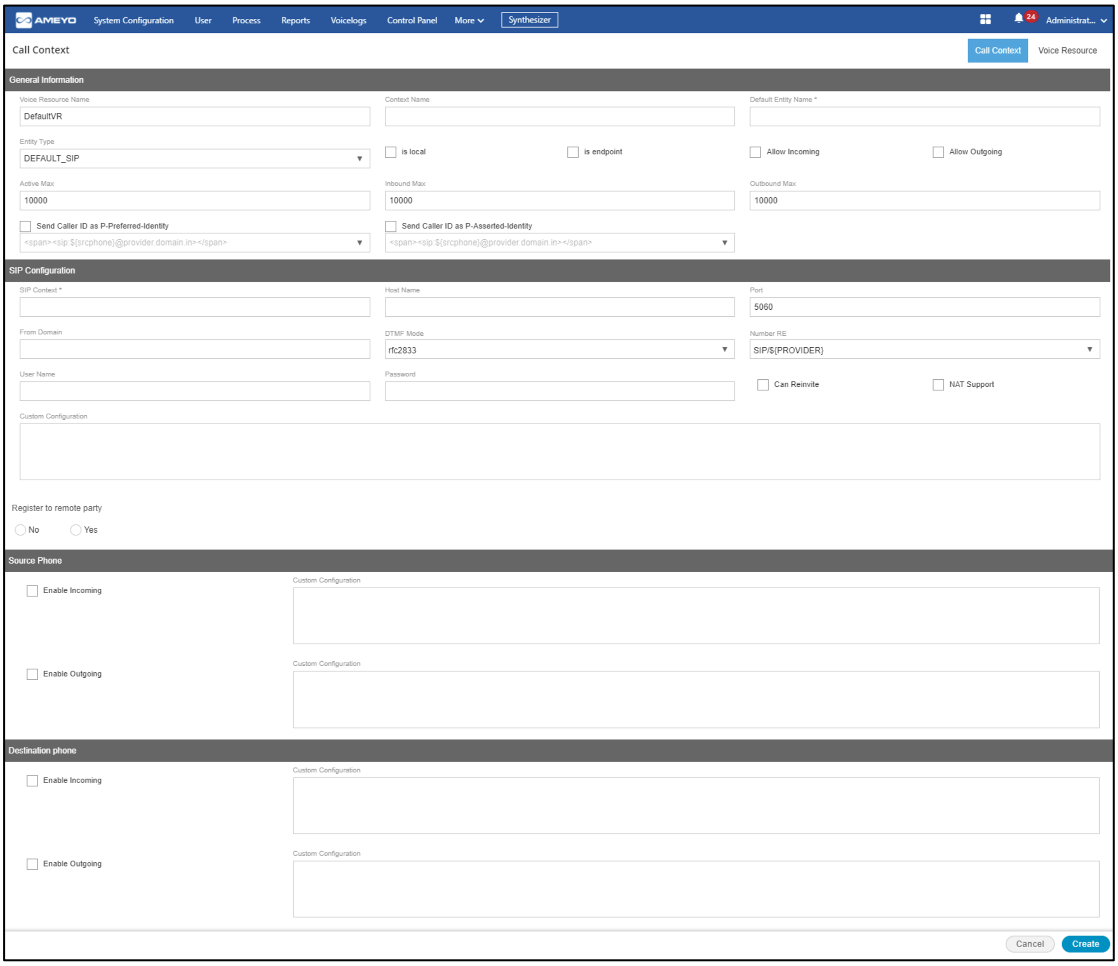


Figure: Pop-up to add a Call Context

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 the Context Name of the SIP entity.
4. Provide a name for the entity.
5. Select any of the following entity type.
   - DEFAULT_SIP
   - DEFAULT_ZAP_TRUNK

We are selecting "DEFAULT_SIP" in this test case.

6. **Is Local:** If this is checked then entity will be visible to the Agent.
7. **Is Endpoint:** No other agent can select that entity.
8. **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.
9. **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.
10. **Active Max:** Maximum allowed active channels. It allows system not to maintain active calls beyond the configured range with this call context.
11. **Inbound Max:** Maximum allowed incoming channels. It allows system not to receive incoming calls beyond the configured range with this call context.
12. **Outbound Max:** Maximum allowed outgoing channels. It allows system not to dial outgoing calls beyond the configured range with this call context.
13. **Send Caller ID as P-Preferred-Identity:** Enable the checkbox, if you want to send the callerID as the P-Preferred-Identity. After enabling it, select the identity from the available drop-down list.
14. **Send Caller ID as P-Asserted-Identity:** Enable the checkbox, if you want to send the callerID as the P-Asserted-Identity. After enabling it, select the identity from the available drop-down list.

15. In SIP Configuration section, provide the following details about the SIP.

    - **SIP Context:** The context of a 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 the 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 the receiver.
        - SIP/Provider: SIP/${PROVIDER}
        - SIP/Number@Provider: SIP/${NUMBER}@${PROVIDER}
    - **Username:** The username of the client. If client SIP entity requires authentication.
    - **Password:** Authentication password to 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 a particular SIP entity.
- **Register to remote party:** Select "Yes" radiobutton, if you want to register this SIP to the Remote Party also.

16. **Source Phone:** You can enable outgoing and incoming for the Source Phone. You can also provide the custom configuration.
17. **Destination Phone:** You can enable outgoing and incoming for the Destination Phone. You can also provide the custom configuration.
18. Click "Create" button to create a new Call Context.

10.2.1.2 Edit the Call Context

Perform the following steps to edit the Call Context

1. Select the Call Context which you want to edit.
2. Click "Edit" button present at the top right corner of the page.
3. The following page arises on which you can edit the entries of the call context.

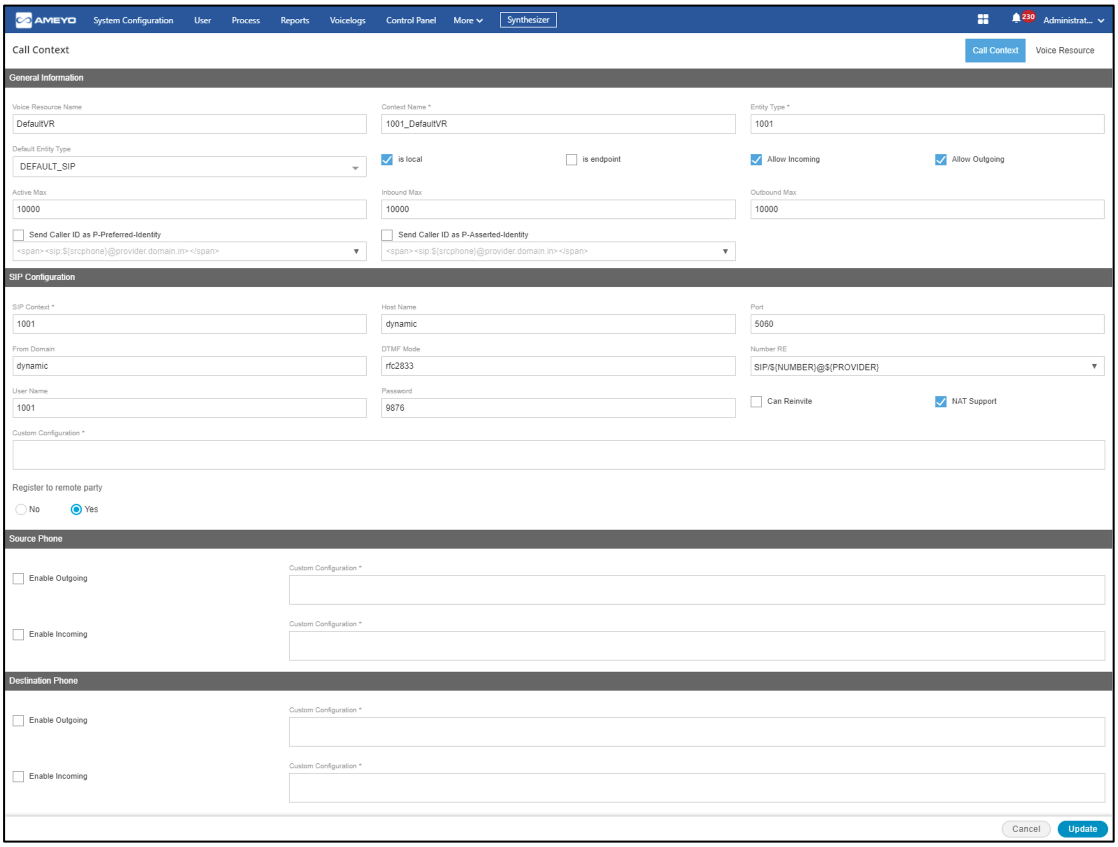


Figure: Edit a Call Context

10.2.1.3 Delete the Call Context

If you want to delete the Call context then, click "Delete" button present at the right top of the page, to delete the 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.

10.3 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).

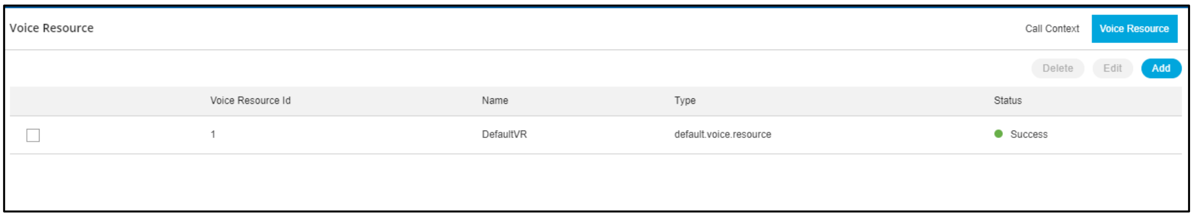


Figure: Voice Resource Tab

10.3.1 Add a Voice Resource

Perform the following steps to add a new Voice Resource.

1. Click "Add" button present at the right top of the page. The following page is displayed.

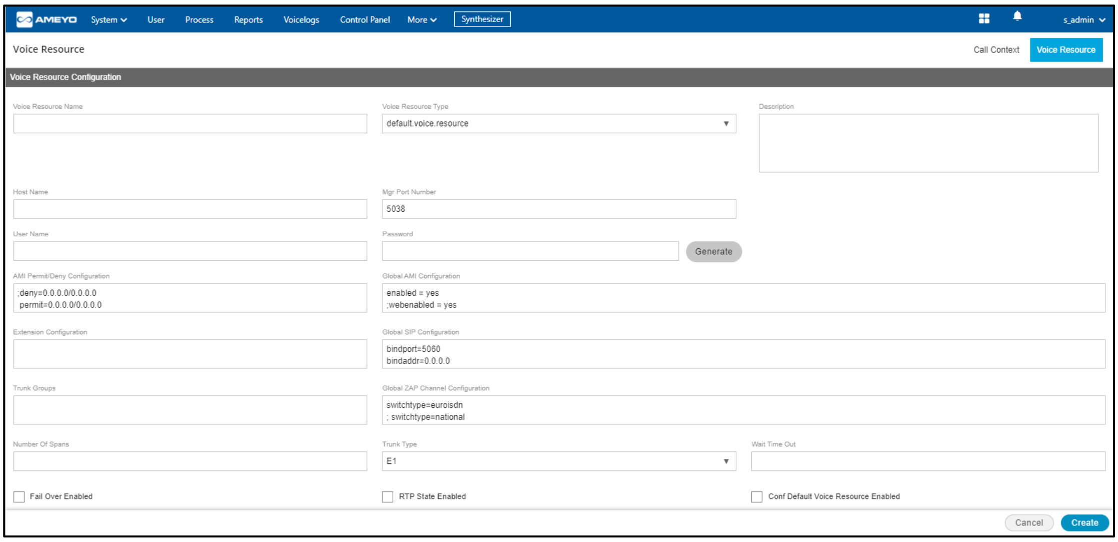


Figure: Adding a Voice Resource

On the displayed screen provide the following information.

2. **Voice Resource Name:** Provide the name of the voice resource.
3. **Voice Resource Type:** Select the type of the voice resource from the drop-down list.
4. **Host Name:** Provide the IP address or the domain name of your call server location.

5. **My Port Number:** Provide the PORT number at which your call server is configured to word upon.
6. **User Name:** Provide the user name of your voice resource through which you want to register your voice resource.
7. **Password:** Provide the password of your voice resource. Click "Generate" button to generate the provided password to your voice resource.
8. **AMI Permit/Deny Configuration:** Provide the AMI Permission settings of your voice resource.
9. **Global AMI Configuration:** Provide the global AMI Configuration of your voice resource. The default configuration is already provided here which you can configure according to your usecase.
10. **Extension Configuration:** Provide your extension configuration.
11. **Global SIP Configuration:** Provide the global SIP Configuration of your voice resource. The default configuration is already provided here which you can configure according to your usecase.
12. **Trunk Groups:** Provide the trunk groups for your voice resource.
13. **Global ZAP Channel Configuration:** Provide your ZAP channel configuration for the PRI you have used.
14. **Number of Spans:** Provide the total number of spans.
15. **Trunk Type:** Select the type of the trunk from the drop-down list.
16. **Wait Time Out:** Provide the time in seconds for which a call will wait before timed out session.
17. **Fall Over Enabled:** Check the box if you want to enable the Fall Over Configuration for your voice resource.
18. **RTP State Enabled:** If you want to enable the RTP state, then enable the check box.

19. **Conf Default Voice Resource Enabled:** Enable the checkbox to enable default Voice resource configuration.
20. Click "Create" button to create the voice resource.

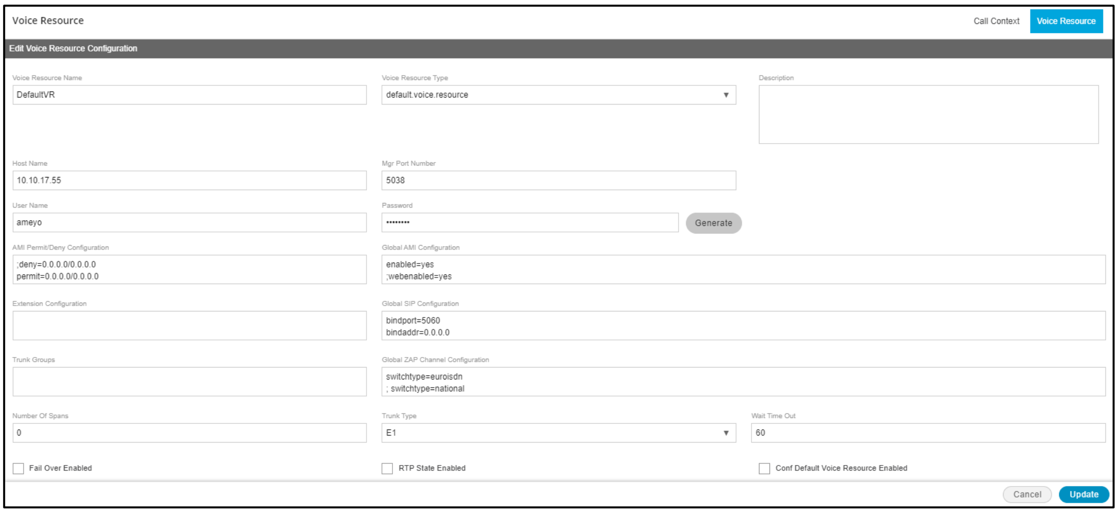


Figure: Sample Voice Resource

10.3.1.1 Voice Resource Activation Status

Once the voice resource is created, then the voice resource will be registered at the call server. If it is registered successfully, then the status will turn to "Success"; else it will show the status as "Failure" on the main Voice Resource screen.

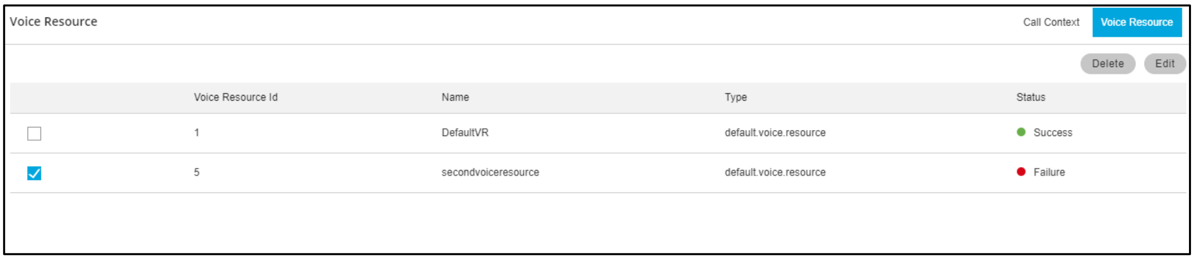


Figure: Voice Resource Registration Status

10.3.2 Edit a Voice Resource

Select a voice resource which you want to edit and click "Edit" button. The same page will display which had been displayed while creating the new voice resource.

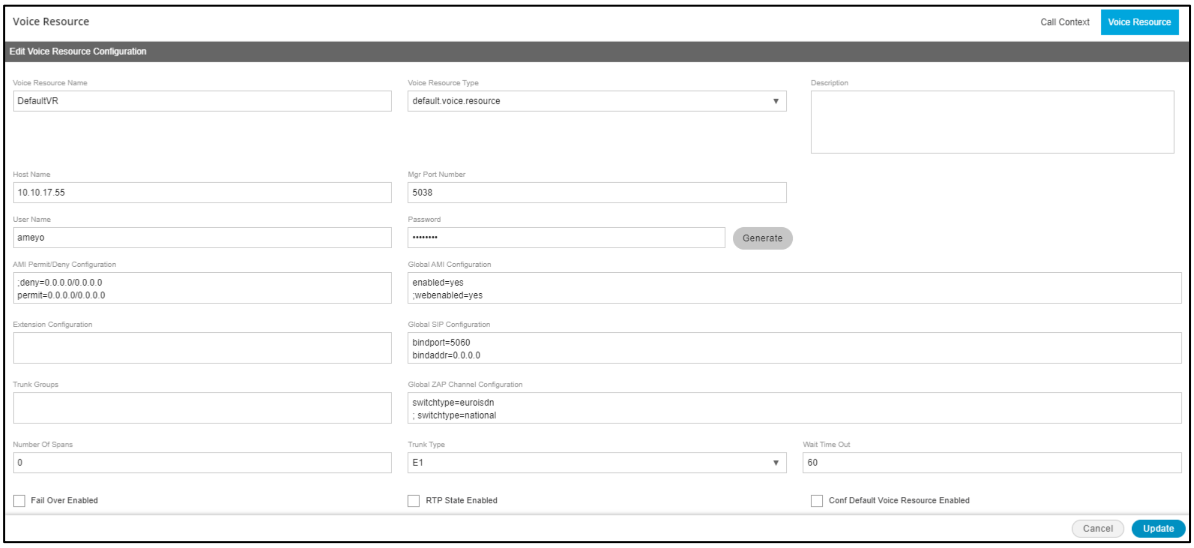


Figure: Edit Voice Resource

10.3.3 Delete the Voice Resource

Select a voice resource which you want to delete and click "Delete" button. A confirmation modal is displayed.

Figure: Delete Voice Resource

Click "Yes" to delete the voice resource; else click "No"

Once the voice resource is deleted from the system, then there is no way to get the deleted voice resource back. It will be deleted permanently.

11. 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 actually 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.

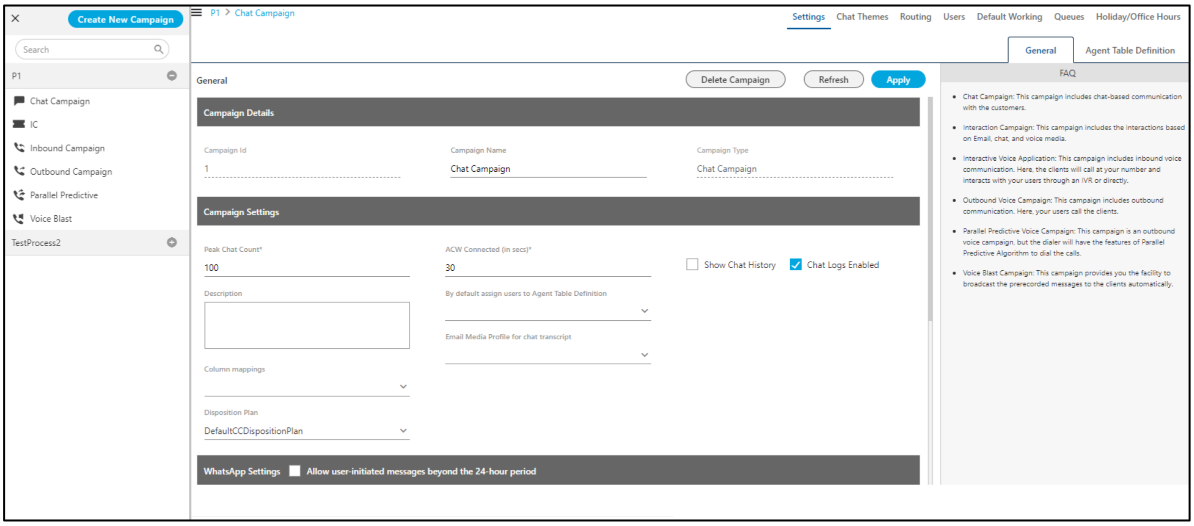


Figure: Settings for All Campaigns

11.1 Chat Campaign Settings

In the left navigation bar of Process 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.

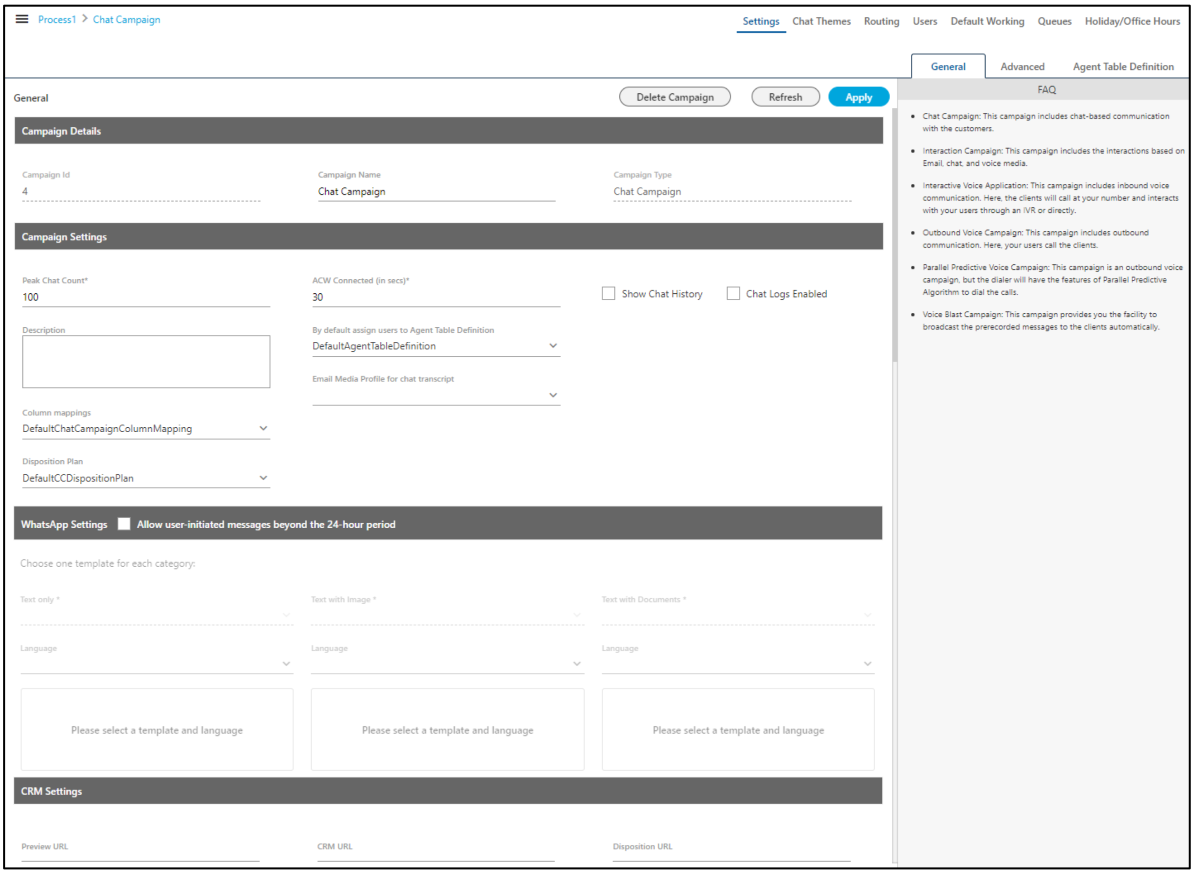


Figure: Settings of Chat Campaign

The proxy server with the chat (Ameyo WebChat or any other chat medium) can be used. The administrator has to configure the proxy server, named as nginx-based Proxy Support . After configuration, all the messages coming through Chat medium will first route from proxy server and then they will be received at Ameyo application server. For further information contact Ameyo Support team.

At the right side of the campaign settings page, some of the commonly asked definitions of settings are defined. You can refer to those definitions.

It contains the following tabs.

- Settings
- Queues
- Routing
- Chat Themes
- Users
- Default Working
- Holiday/Office Hours

11.1.1.1 Linking Chat Campaign with Interaction Campaign

You have to perform the following steps to link the Chat Campaign with Interaction Campaign. The tickets will not be created for any Chat Message, if it is not linked.

1. At the Linux-based Server where Ameyo is installed, execute the following command to enter the console of PostgreSQL.
   psql -U postgresql
2. Execute the following command to access "ameyodb" database.
   \c ameyodb
3. Execute the following command to link the Chat Campaign with an Interaction Campaign.
   INSERT INTO server_preference_store (context_type,context_id,key,value) VALUES ('chatCampaignConfig','<chat_campaign_id>','interactionCampaignIds','<interaction_campaign_id>]');

You have to replace the "Chat_Campain_ID" with the ID of the Chat Campaign and "Interaction_Campaign_ID" with the ID of the Interaction Campaign, which you want to link.

```
login as: root
Authorized uses only. All activity may be monitored and reported.
root@10.10.10.33's password:
Last login: Tue Oct 30 13:18:11 2018
[root@localhost ~]# psql -U postgres
psql (9.3.19)
Type "help" for help.

postgres=# \c ameyodb
You are now connected to database "ameyodb" as user "postgres".
ameyodb=#
ameyodb=# INSERT INTO server_preference_store (context_type,context_id,key,value
) VALUES ('chatCampaignConfig','9','interactionCampaignIds','[10]');
INSERT 0 1
ameyodb=#
```

Figure: Commands to link Chat Campaign with Interaction Campaign

4. Now, execute the following command to exit from the database and PostgreSQL console.
   \q

11.1.1.2 Settings Tab

11.1.1.2.1 General Settings

This tab contains only "General Settings".

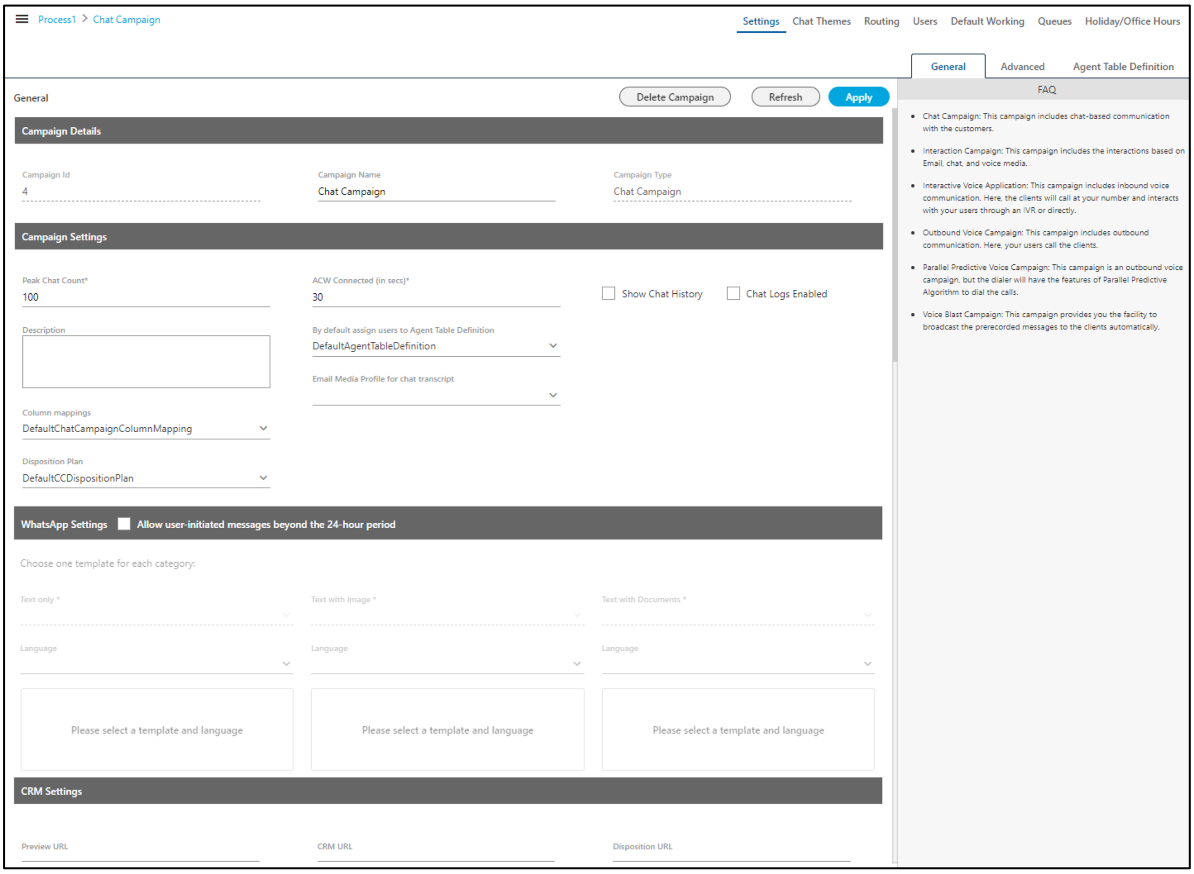


Figure: General Settings for Chat Campaign

Here, the General Settings is divided into the following sections.

11.1.1.2.1.1 Campaign Details

These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.

11.1.1.2.1.2 Campaign Settings

It contains the following settings, which you have configured while creating a Chat Campaign. You can modify them here.

- Peak Chat Count
- ACW Connected (in secs)*
- Column Mappings
- Disposition Plan

- Description

In addition, it contains the following new settings that you can configure only while modifying an existing Chat Campaign.

- **By default assign users to Agent Table Definition:** Here, you can select the default Agent Table Definition for this campaign.
- **Email Media Profile for chat transcript:** Here, you can select the Email Media Profile through which the Chat Transcript of Ameyo Web Chat will be sent to that customer who have opted to send the Chat Transcript.
- **Show Chat History:** Select this option to to show the Historical Chat in the Ameyo Web Chat to both the customers and the agents.
- **Chat Logs Enabled:** Select this option to enable the logging of Chat.

11.1.1.2.1.3 WhatsApp Settings

WhatsApp Settings present of Chat Campaign helps to create and configure the templates for WhatsApp Outbound notifications. These configured notifications will be sent to the customers. The customer can reply to the received notification and then have a conversation with the agent. This feature helps the business to reply after the 24 hour, as the agent only get the 24 hour window in which the agent can reply.

The "Reply Via" feature is available for "WhatsApp for Business". However, WhatsApp for Business allows responding to messages (from the agent to the customer) within 24 hours of the last incoming message sent by the customer to the agent.

After that window of 24-hour, the WhatsApp for Business allows sending the template-based messages only, which may contain the text. It is a paid service.

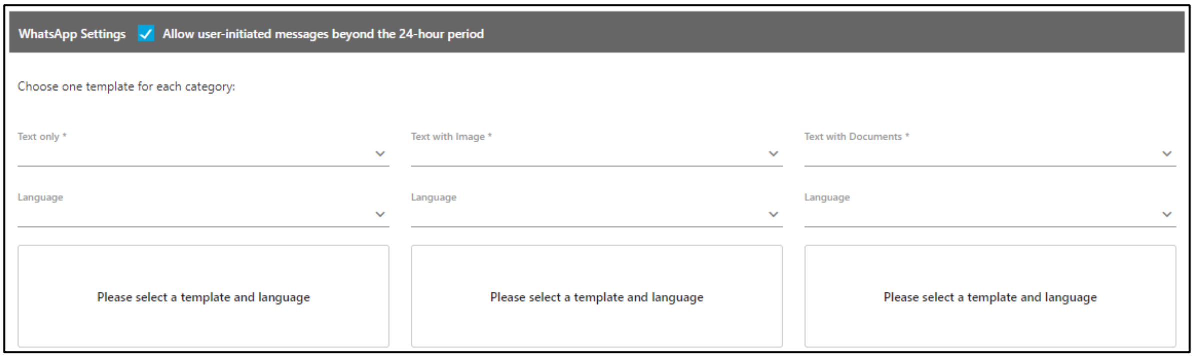


Figure: WhatsApp Settings of Chat Campaign

Perform the following steps

1. Enable WhatsApp Settings option, as these settings are not enabled by-default.
2. Select the text from the drop-down list. It is the configured notification that has been configured from backend. The administrator can select the notification that has been configured with image or document.
3. Select the language from the language drop-down.
4. Save the settings.

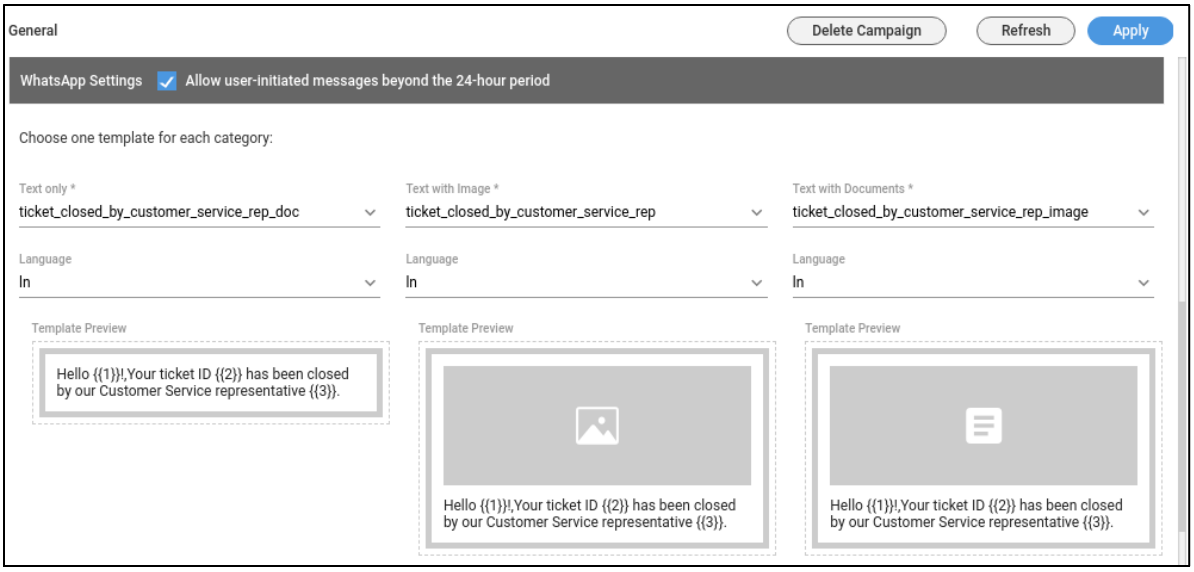


Figure: Configured WhatsApp Settings Sample

The Administrator can select "text" type template to send the text messages, "image" type template to send the images (only in png and jpeg), and "doc" type template to send the documents in PDF format only.

11.1.1.2.1.4 CRM Settings

These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.

11.1.1.2.2 Advanced

The Nodeflow helps the customer understand their need, and accordingly, they can decide which type of agent they want to have a conversation with. This can be achieved with the help of custom nodeflows. The administrator has the privileges to upload the nodeflow from here.

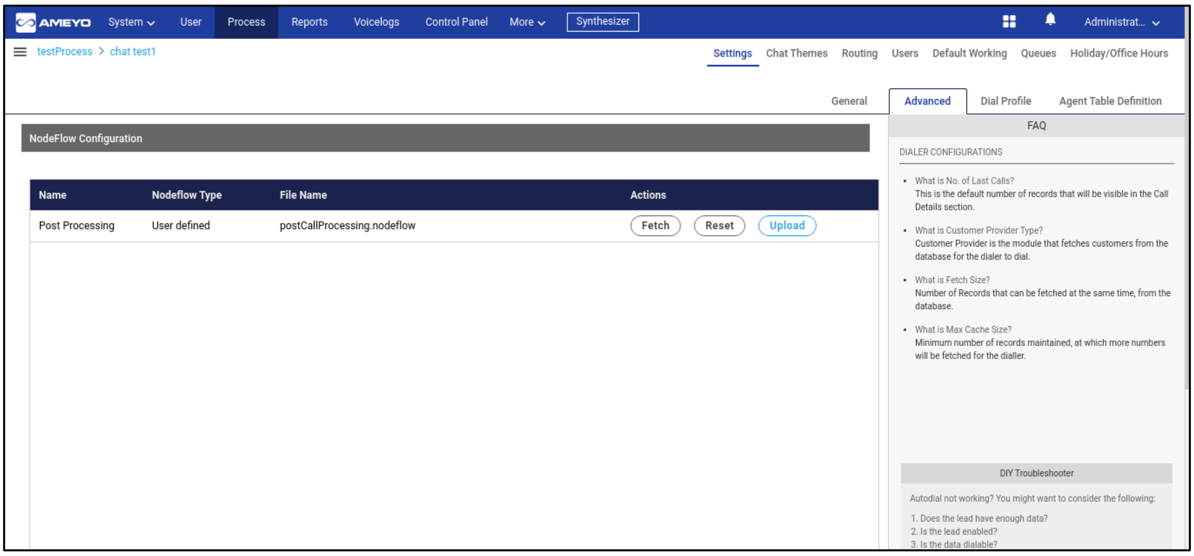


Figure: Advanced Settings Tab in Chat Campaign

The custom nodeflows can be uploaded from the advanced tab, as of now, only post processing nodeflow option has been introduced The administrator can click "Upload" button to upload the custom nodeflows. Perform the following steps to upload the custom nodeflow from here.

1. Click "Upload" button. A pop-up to upload the chat nodeflow is displayed.

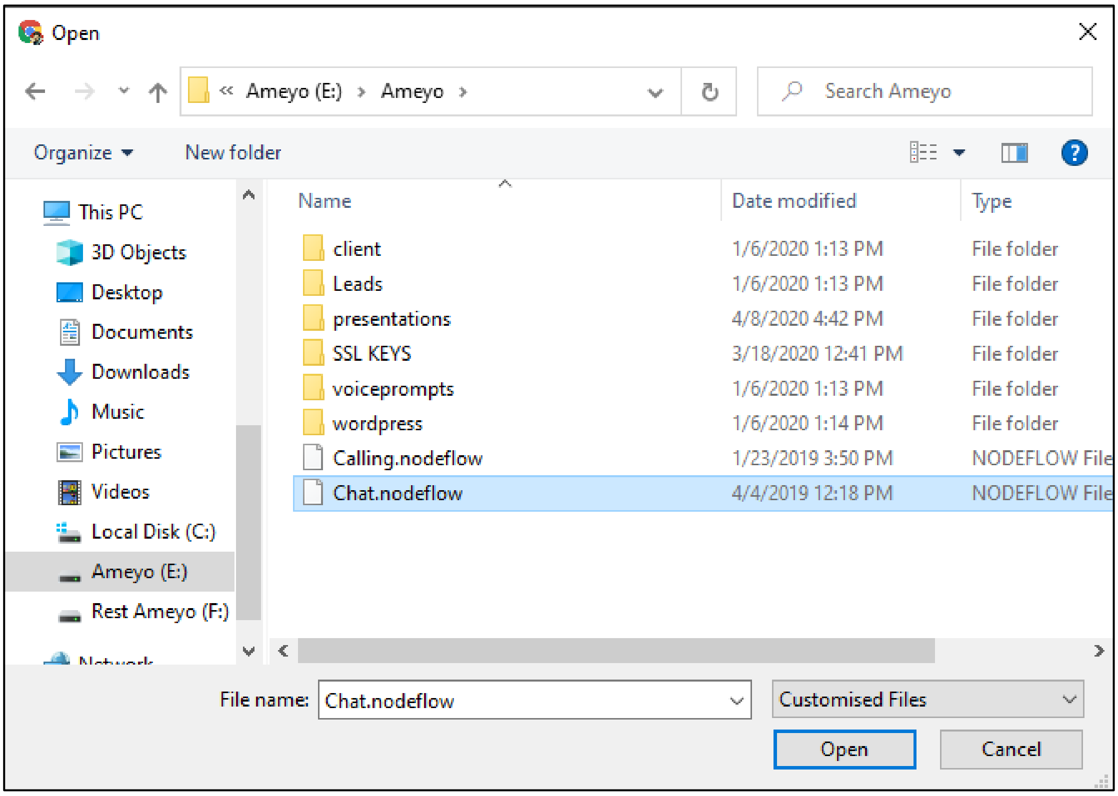


Figure: Uploading the Custom Nodeflow

2. Select the nodeflow from your system and click "OK" to upload the nodeflow.
3. A toast notification is shown for the custom nodeflows uploaded successfully.

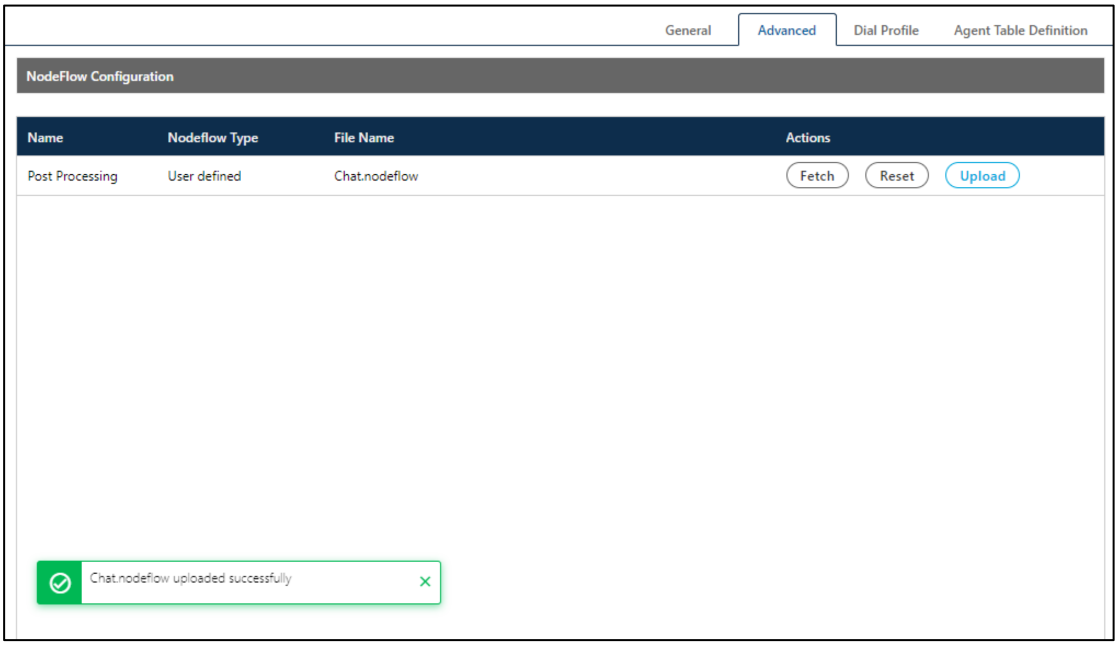


Figure: Notification shown for Successful Nodeflow Upload

4. The administrator can click "Fetch" button to download the uploaded nodeflow.
5. The "Reset" button allows the administrator to reset the uploaded nodeflow and then can upload a new nodeflow from there.

An API has also been introduced to upload the chat custom nodeflow. In this API, the user has to provide the path of the nodeflow and the campaignId in which the nodeflow has to be uploaded.

11.1.1.2.3 Agent Table Definition

This tab allows you to select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition. Know more...

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.

11.1.1.3 Chat Themes

This tab has already been explained in the Process Settings. Know more...

11.1.1.4 Holiday/Office Hours

This tab has already been explained in "System Configuration". Know more...

11.1.1.5 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**
5. **Agent Table Definition in Campaign**

11.1.2 Queue Management in Chat Campaign

Queues Tab in the Campaign Settings allows you to create and manage the queues.

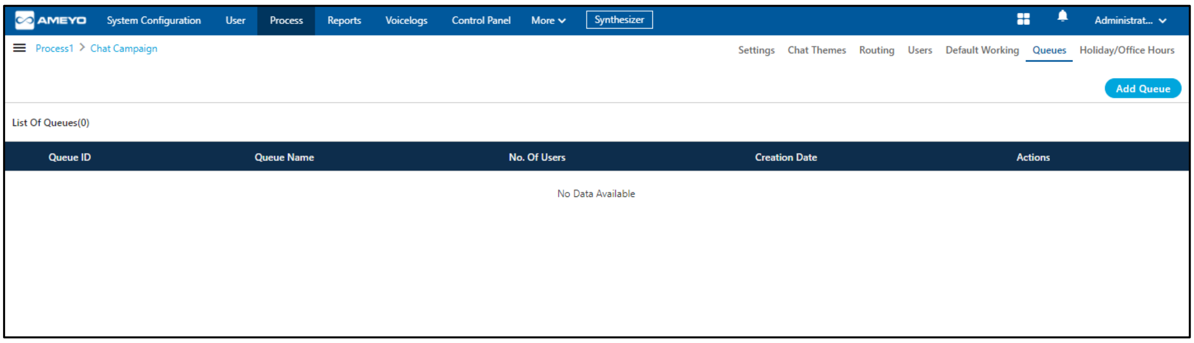


Figure: Queues Tab

11.1.2.1 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.

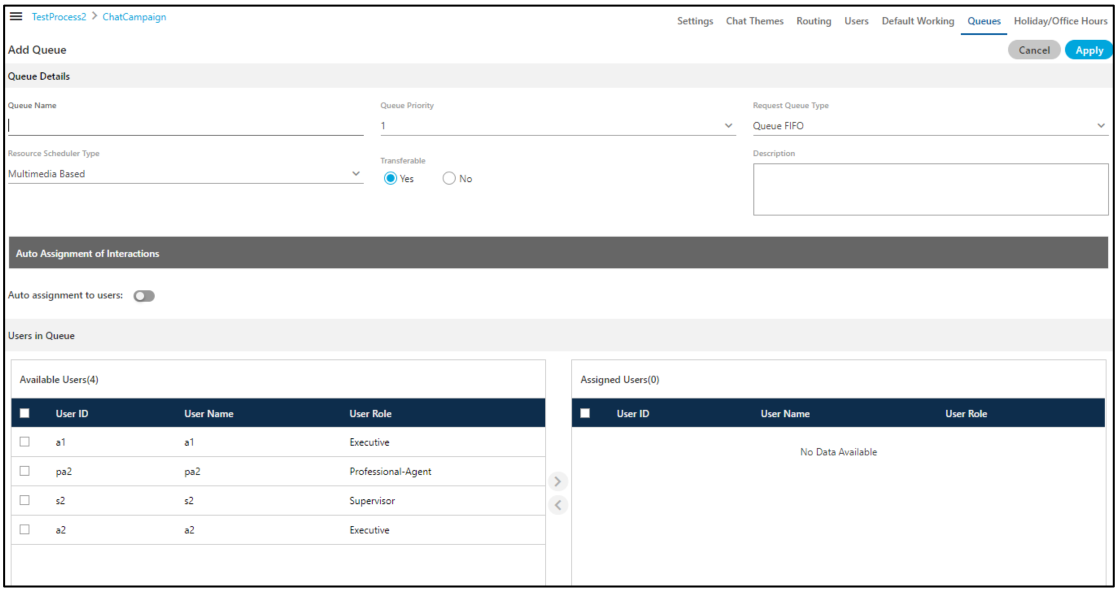


Figure: Create Queue

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 will 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 the 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. Queue with "1" priority will be selected

first. Similarly, Queue with "2" priority will be selected at the second place.

Example:

Question: 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 what will happen? Let us go through the following table.

Queue	Queue Priority	Customer	Agent
Queue1	1	Customer1	Agent1
Queue2	2	Customer2	Agent1

C. **Answer:** In such a scenario, Agent1 will be connected first with "Customer1" as its queue - Queue1 - has higher priority.

5. **Resource Scheduler Type (Licensable):** 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. **Multiple Extension:** Select it if the agents have multiple extensions and they are supposed to attend multiple communications (chat or call) simultaneously. One agent can be connected to two customers in the same queue.

    B. **Skill Based:**Select it to connect the communication (chat or call) to that agent who has 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 from the "Available Users" section and click icon.

To unassign a user, select the users in "Assigned Users" and click icon.

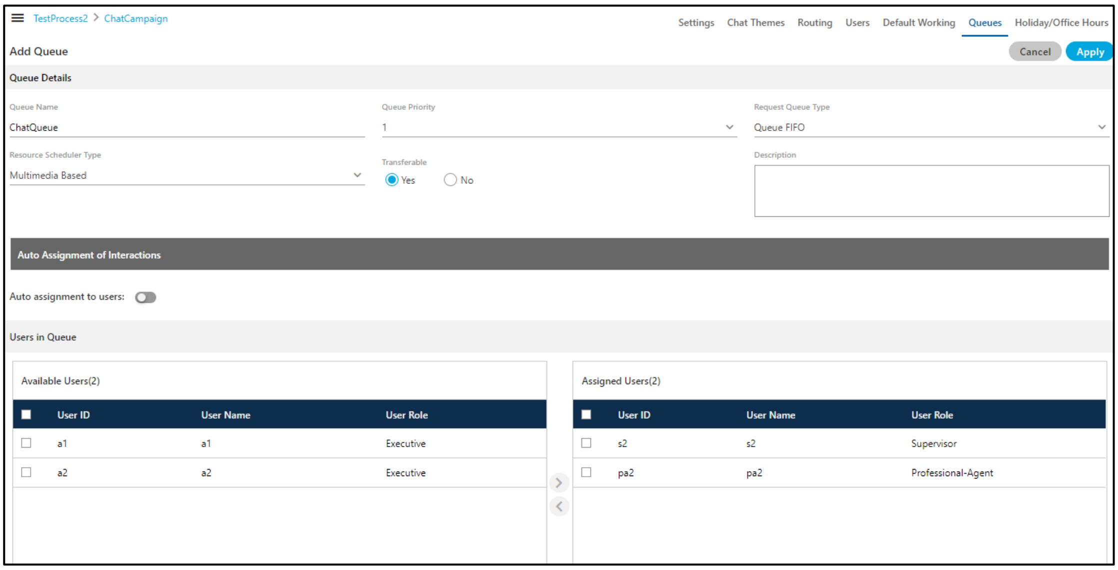


Figure: Sample Details to create a Queue

9. Click "Apply" to create the queue.

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

You can create multiple queues using these steps.

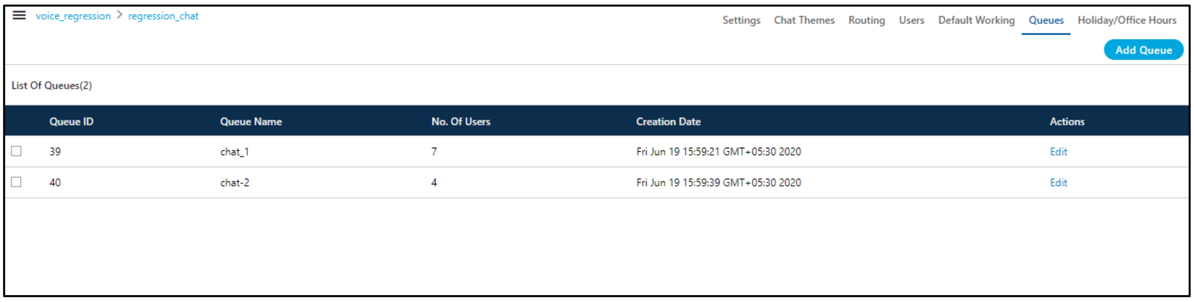


Figure: List of Queues

11.1.2.2 Edit Queue

Click "Edit" icon present in the list of the queues. The same page opens which opens at the time of the queue creation. You can change all the information entered at the time of the queue creation.

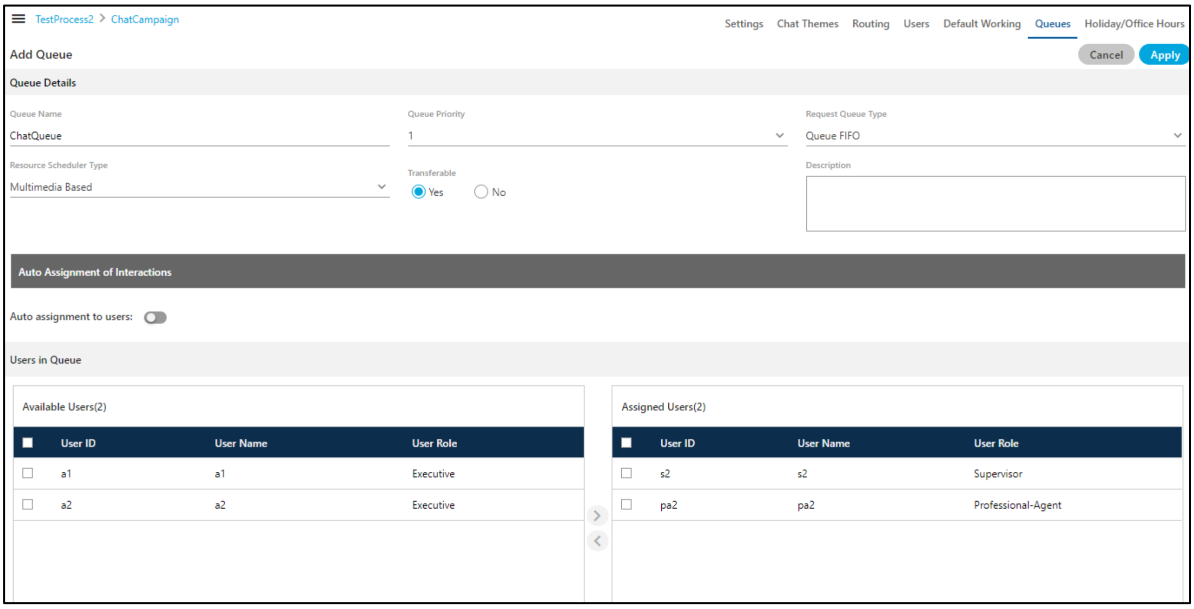


Figure: Edit the Queue

11.1.2.3 Delete Queue

You can delete the queue. Select the queue, which you want to delete and then, click "Delete" button present at the right top corner of the page. A confirmation pop-up comes up.

Figure: Delete Queue

Click "Delete" button to confirm the deletion of the queue, else click "Cancel".

11.1.3 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.

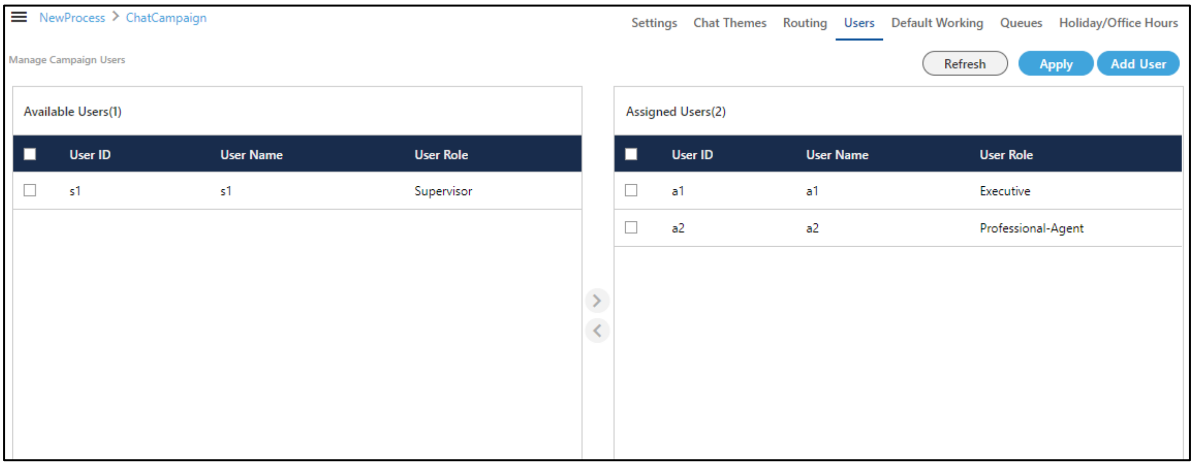


Figure: User Management

User Assignment Methodology: The user assignment is atomic in nature, that is not transactional. If some users out of all selected users could not be assigned because of any reason such as configuration, then allowed users will be assigned except those are failed to be assigned. In the case of license restriction, the users of which license is not obtained will not be displayed in the section of available users.

The errors during the User Assignment will not be displayed in the following case.

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.

11.1.4 Chat Campaign Routing

Routing Tab lets you create the nodeflows to manage the routing of communication (chat, call, or email) in a campaign.

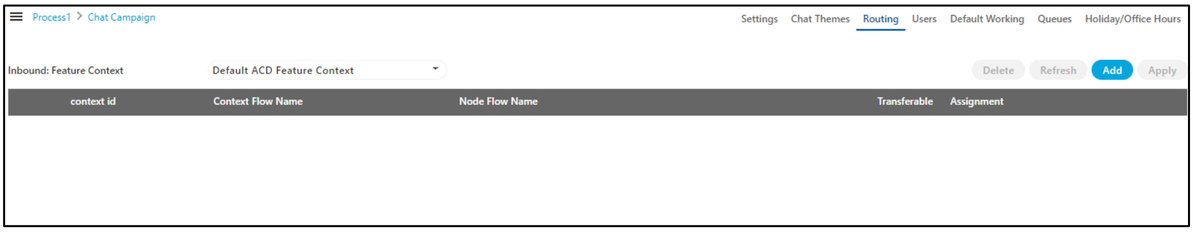


Figure: Routing Management

11.1.4.1 Add a Nodeflow for Routing

Perform the following steps to create a nodeflow.

1. Click "Add" button to create a nodeflow. It shows a new row in the white area just below the column header.

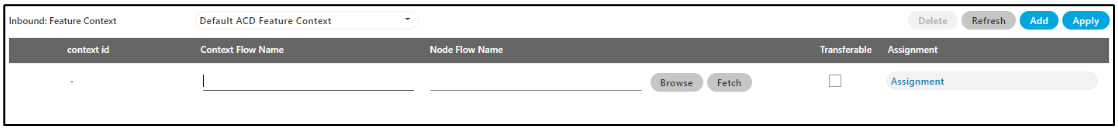


Figure: Add Context Flow

2. Provide a name for the context flow.
3. In the "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.

11.1.4.2 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.

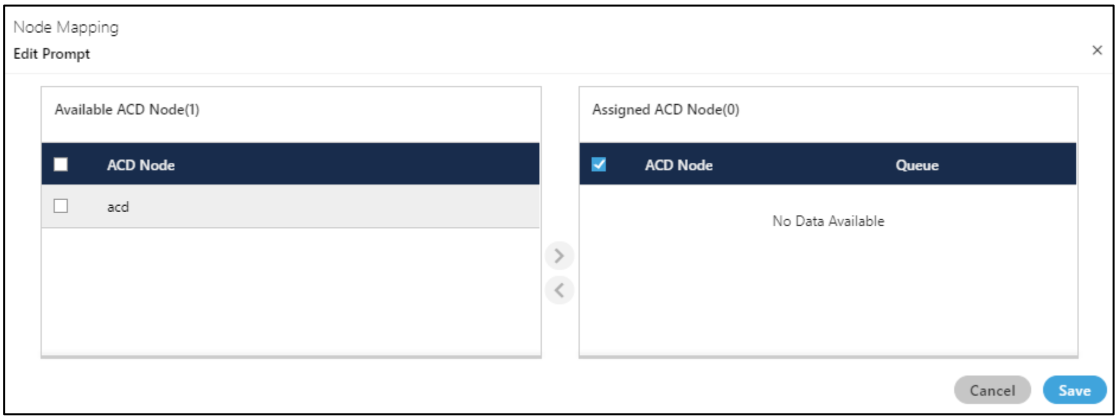


Figure: Assign Nodeflow to a Queue

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.

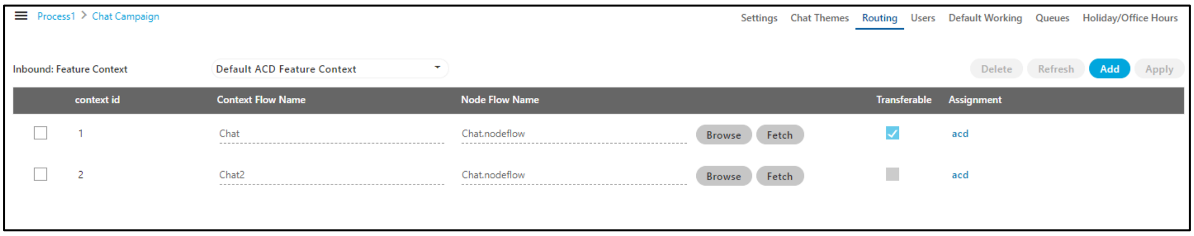


Figure: Added Nodeflows

11.1.4.3 Edit Routing

Select the routing which you want to edit. After selecting it, the user can change the "Context Flow name," change the "Node Flow" and assignment of queues in it.

After editing the details, click "Apply" button to save the changes made.

11.1.4.4 Delete Routing

Select the Routing which you want to delete and click "Delete" button. A confirmation pop-up is arised.

Figure: Confirmation pop-up

Click "Yes" button to delete the routing, else click "No" button.

11.1.5 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.

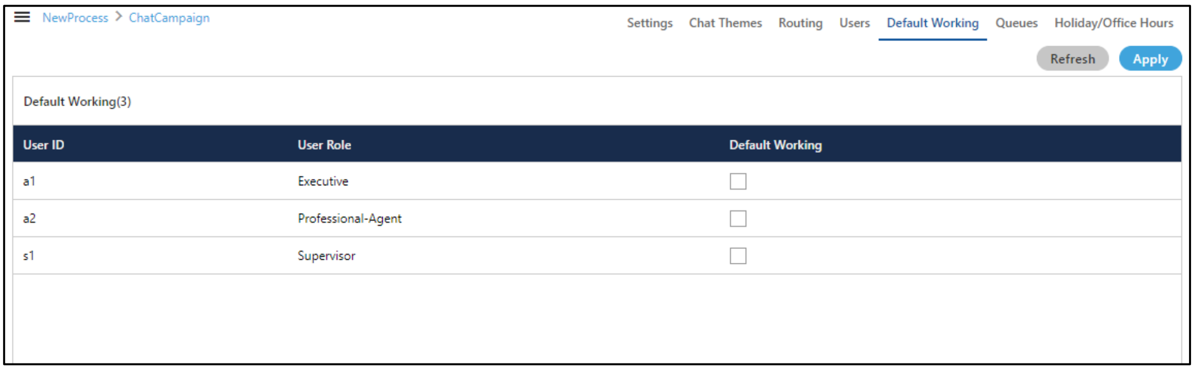


Figure: Set Default Working

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.

11.1.6 Agent Table Definition in Campaign Settings

The Agent Table Definitions created in a Process will be applicable and available, by default, in all campaigns of that Process. A new tab "Agent Table Definition" has been added in the settings of Interaction Campaign, Chat Campaign, Inbound Campaign, Outbound Campaign, and Parallel Predictive Dialing Campaign. You can select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition.

Agent Table Definition is not available for Voice Blast Campaign.

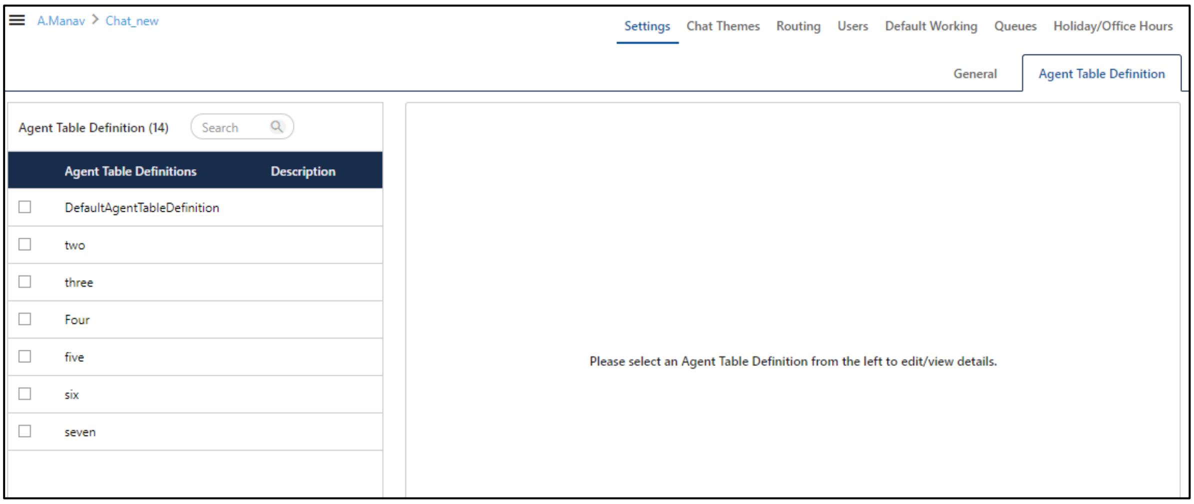


Figure: "Agent Table Definition" tab in the Settings of an Interaction Campaign

The Agent Table Definitions available in this Process are listed in the left section. You can select only one Agent Table Definition to view the options to assign the selected users to this Agent Table Definition in the right section.

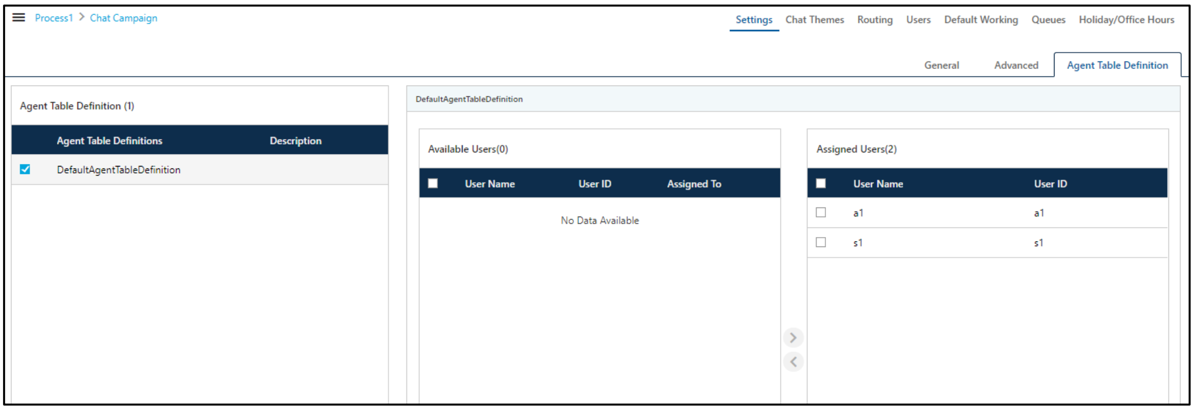


Figure: Assign or Unassign Users to Agent Table Definition

You can select the users in "Available Users" section and click  icon to select the users and move them to "Assigned Users" section.

To unassign users from the Agent Table Definition, select the users in "Assigned Users" section and click  icon to unassign the users.

Click "Save" to assign the users to the selected Agent Table Definition.

If the selected users are already assigned to the different Agent Table Definition, then the following warning message is displayed on the screen.

Figure: Warning Message

A user can be assigned to only one Agent Table Definition. If you want to reassign the users to this new Agent Table Definition, click "Reassign All" button. Else, click "Cancel" button.

If a new agent is assigned to a Campaign, then it will be assigned to the default Agent Table Definition of that campaign until the Administrator modifies it manually.

11.2 Interaction Campaign Settings

In the left navigation bar of Process 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.

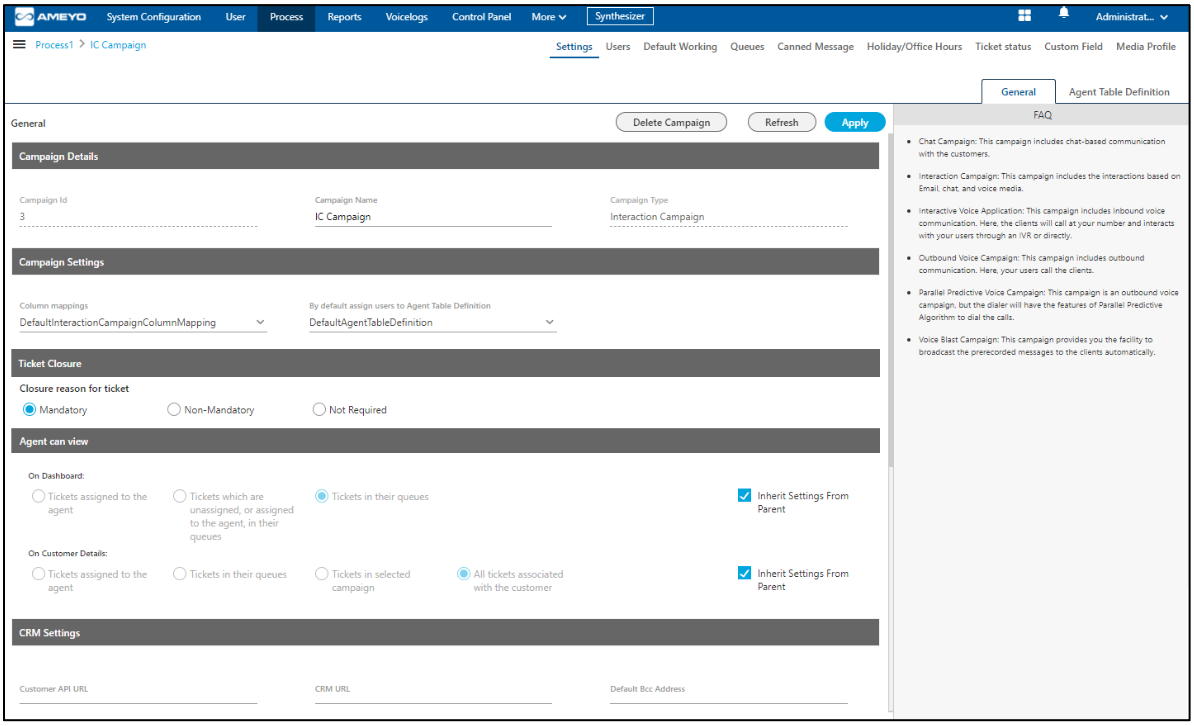


Figure: Settings of Interaction Campaign

At the right side of the campaign settings page, some of the commonly asked definitions of settings are defined. You can refer to those definitions.

The proxy server with the Email based services can be used. The administrator has to configure the proxy server, named as nginx-based Proxy Support . For further information contact Ameyo Support team.

It contains the following tabs.

- Settings → General
- Settings → Agent Table Definition
- Queues
- Users
- Default Working
- Holiday/Office Hours
- Canned Messages
- Ticket Status
- Custom Field
- Media Profile

11.2.1.1 Settings Tab

11.2.1.1.1 General Settings

This tab contains only "General Settings", which are divided into the following sections.

11.2.1.1.1.1 Campaign Details

These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.

11.2.1.1.1.2 Campaign Settings

It contains the following settings.

Column Mappings

Select a different column mapping here.

By default assign users to Agent Table Definition

Here, you can select the default Agent Table Definition for this campaign.

Ticket Closure

It allows the Administrator to specify whether the users have to provide the closure reason while closing the ticket or not. It contains the following 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.

Agent can view

This settings lets you allow the agents to view the tickets of others or not.

- **On Dashboard**: It lets you allow or disallow the agents to view the tickets of other agents on the dashboard. You can check "Inherit from Parent" to inherit this setting from the parent. If you uncheck it, then you can select any of the following 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 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 setting from the parent. If you uncheck it, then you can select any of the following 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.

11.2.1.1.1.3 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.

11.2.1.1.2 Agent Table Definition

This tab allows you to select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition. Know more...

11.2.1.2 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...

We recommend that Ameyo Users such as Professional Agent, Execute, and Supervisor should select only one Interaction Campaign during and after their logon. Selecting Multiple Interaction Campaigns can create some issues. The option to select Multiple Interaction Campagins have been removed already in the later versions of Ameyo AppServer. Therefore, we recommend the Administrator to assign the unique users to an Interaction Campaign so that one user is assigned to only one Interaction Campaign.

11.2.1.3 Queues

Here, you can create and manage the queues. Know more...

11.2.1.4 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...

11.2.1.5 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...

11.2.1.6 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.

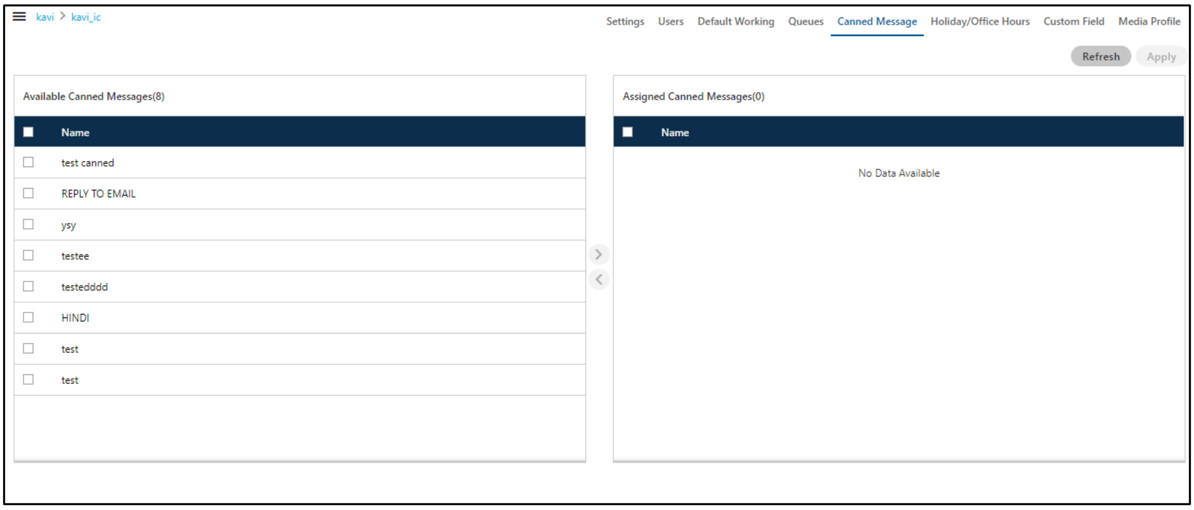


Figure: Canned Messages

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.

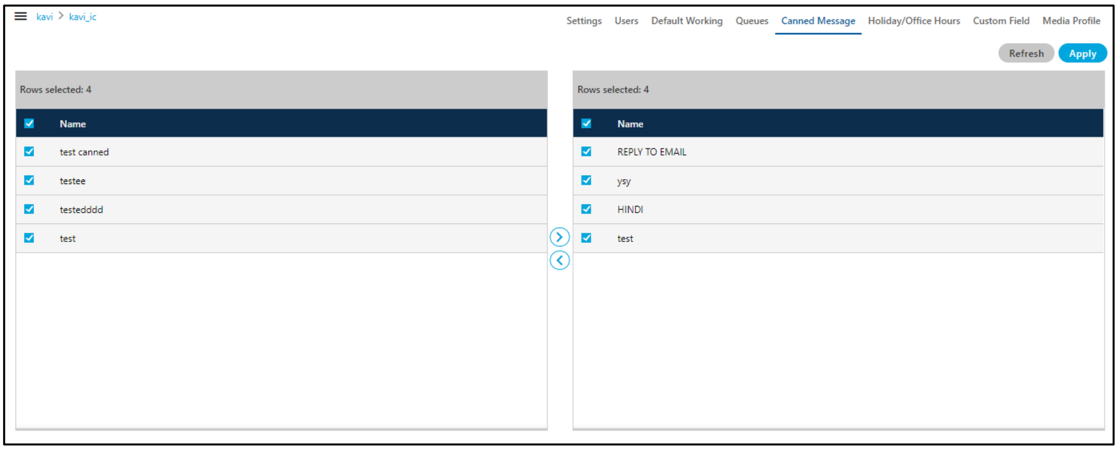


Figure: Assign or Unassign Canned Messages

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.

11.2.1.7 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 more.

11.2.1.8 Ticket Status

This tan lets you assign and unassign the ticket statuses created at the system level in the interaction campaign. Know more...

11.2.1.9 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.

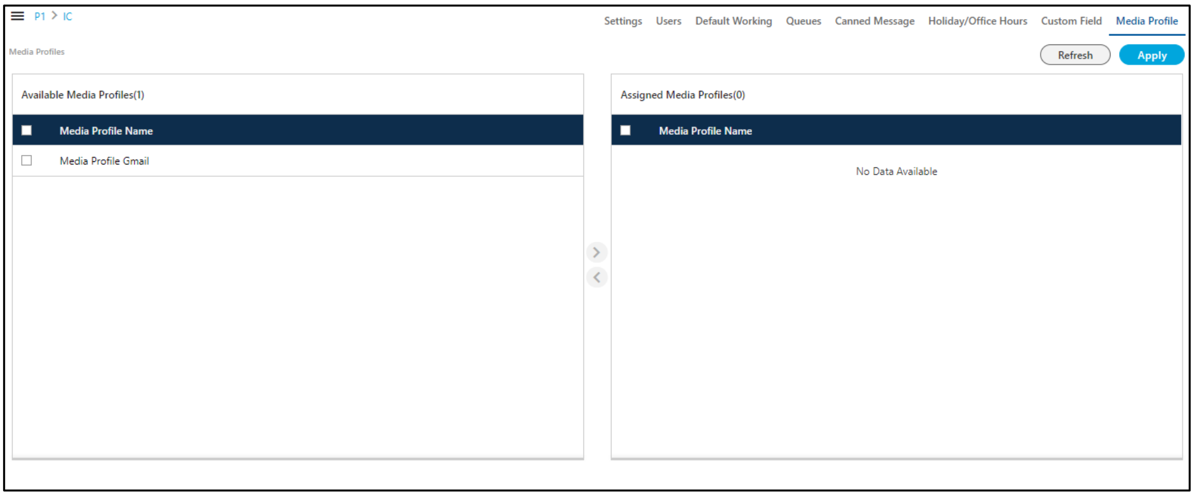


Figure: Media Profile

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.

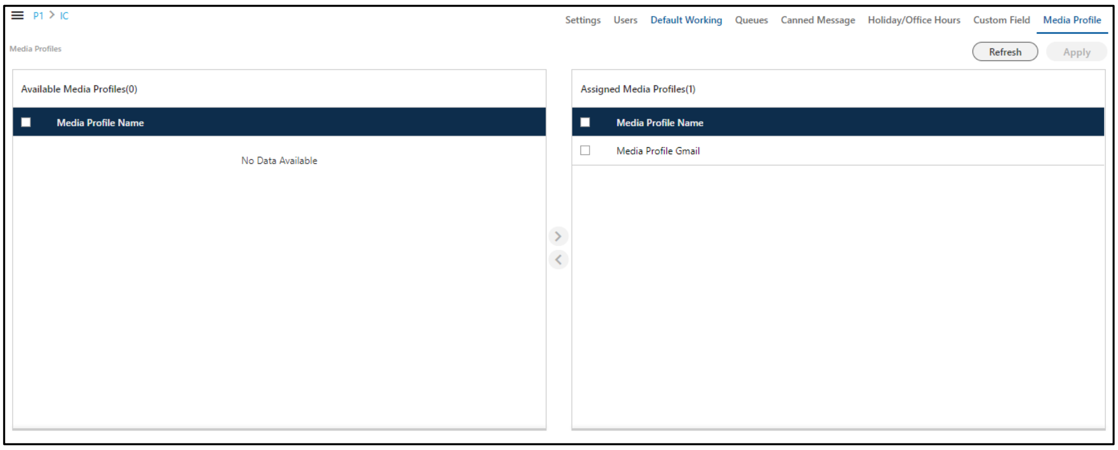


Figure: Assign or Unassign Media Profiles

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.

11.2.2 Queue Management in Interaction Campaign

Queues Tab in the Interaction Campaign Settings allows you to create and manage the queues.

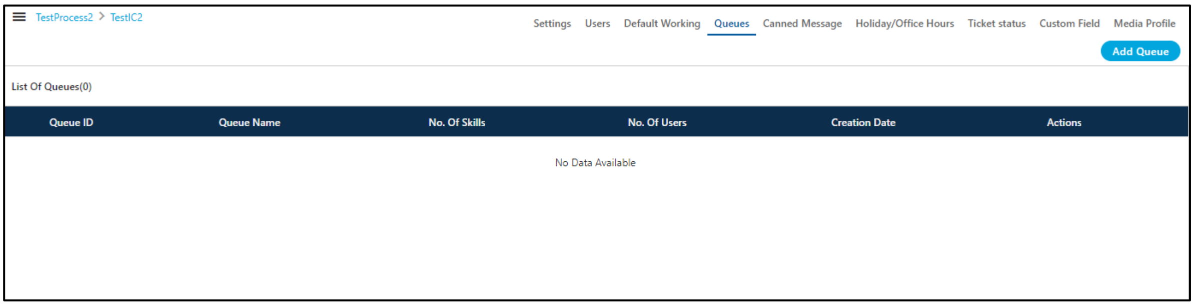


Figure: Queues Tab

We support only one Interaction Campaign. It is advised to create multiple queues in IC to address the different functions of the business requirements (like sales, and support). However, the Queue Monitoring is not available in IC.

11.2.2.1 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.

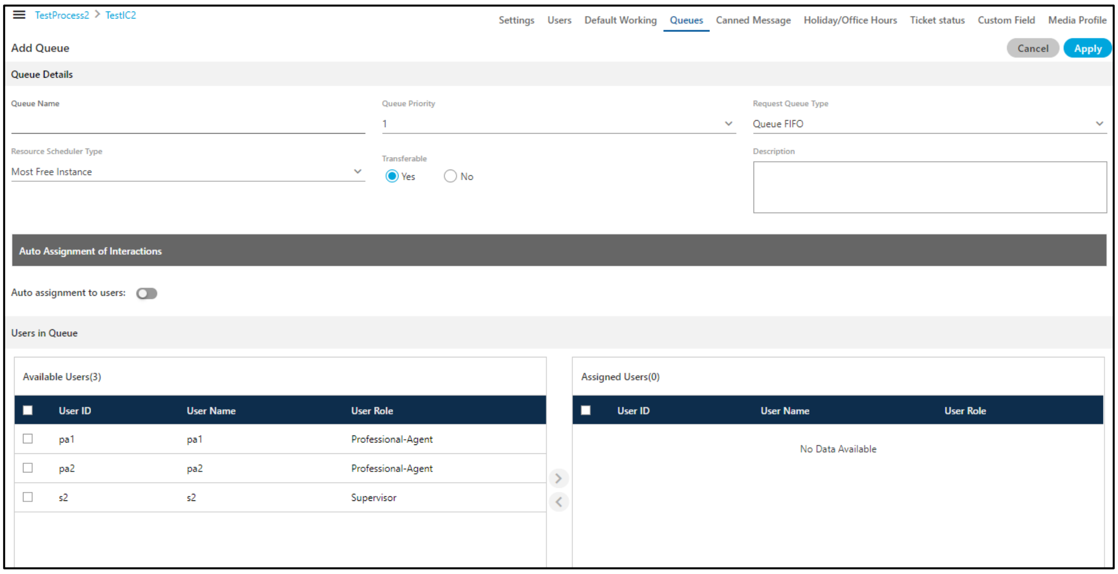


Figure: Create Queue

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 will 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 the 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. Queue with "1" priority will be selected first. Similarly, Queue with "2" priority will be selected at the second place.

Example:

Question: 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 what will happen? Let us go through the following table.

Queue	Queue Priority	Customer	Agent
Queue1	1	Customer1	Agent1
Queue2	2	Customer2	Agent1

C. **Answer:** In such a scenario, Agent1 will be connected first with "Customer1" as its queue - Queue1 - has higher priority.

5. **Resource Scheduler Type (Licensable):** It will let you decide which agent would be connected to the customer when two agents are available to take the interaction.

    A. **Most Free Instance**: Select it to assign the tickets to the Agent who is free and is not working on any of the present ticket. This will help to assign the Ticket to the most free Agent at that time.

6. **Transferable:** Select it to transfer the interaction from this new queue to another queue..

7. Provide a description for the queue.

8. **Auto Assignment to users:** It means to assign the IC media Tickets to the Agents automatically. To assign the Tickets to the Agents, toggle the switch. TO disable this feature and to assign the Tickets to the Agents manually, toggle this switch again.

9. **Assign Users in Queue:** Select the users from the "Available Users" section and click icon.

   To unassign a user, select the users in "Assigned Users" and click icon.

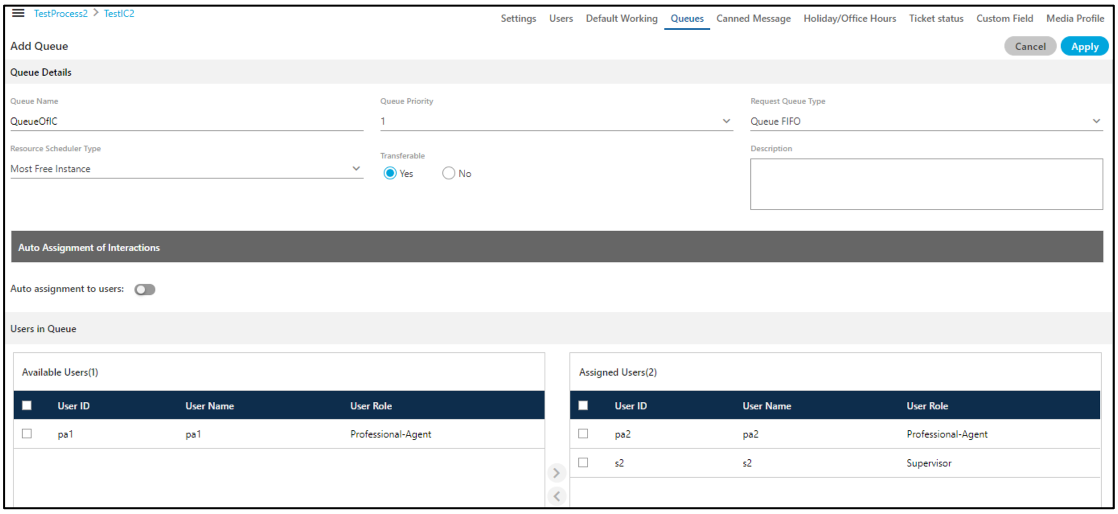


Figure: Sample Details to create a Queue

10. Click "Apply" to create the queue.

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

You can create multiple queues using these steps.

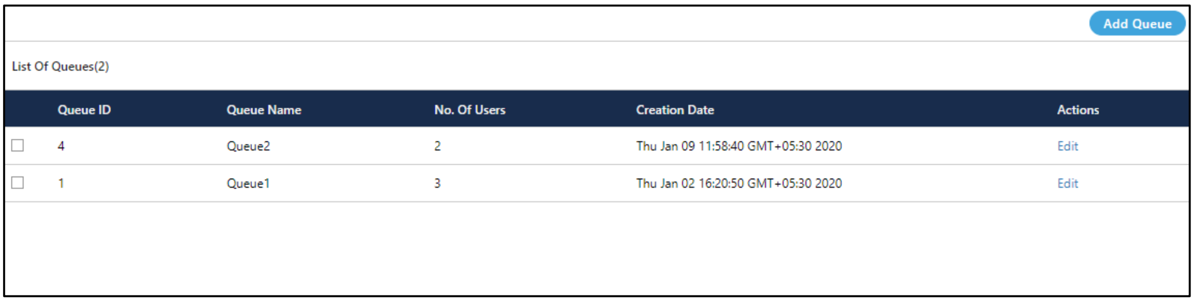


Figure: List of Queues

11.2.2.2 Edit Queue

Click "Edit" icon present in the list of the queues. The same page opens which opens at the time of the queue creation. You can change all the information entered at the time of the queue creation.

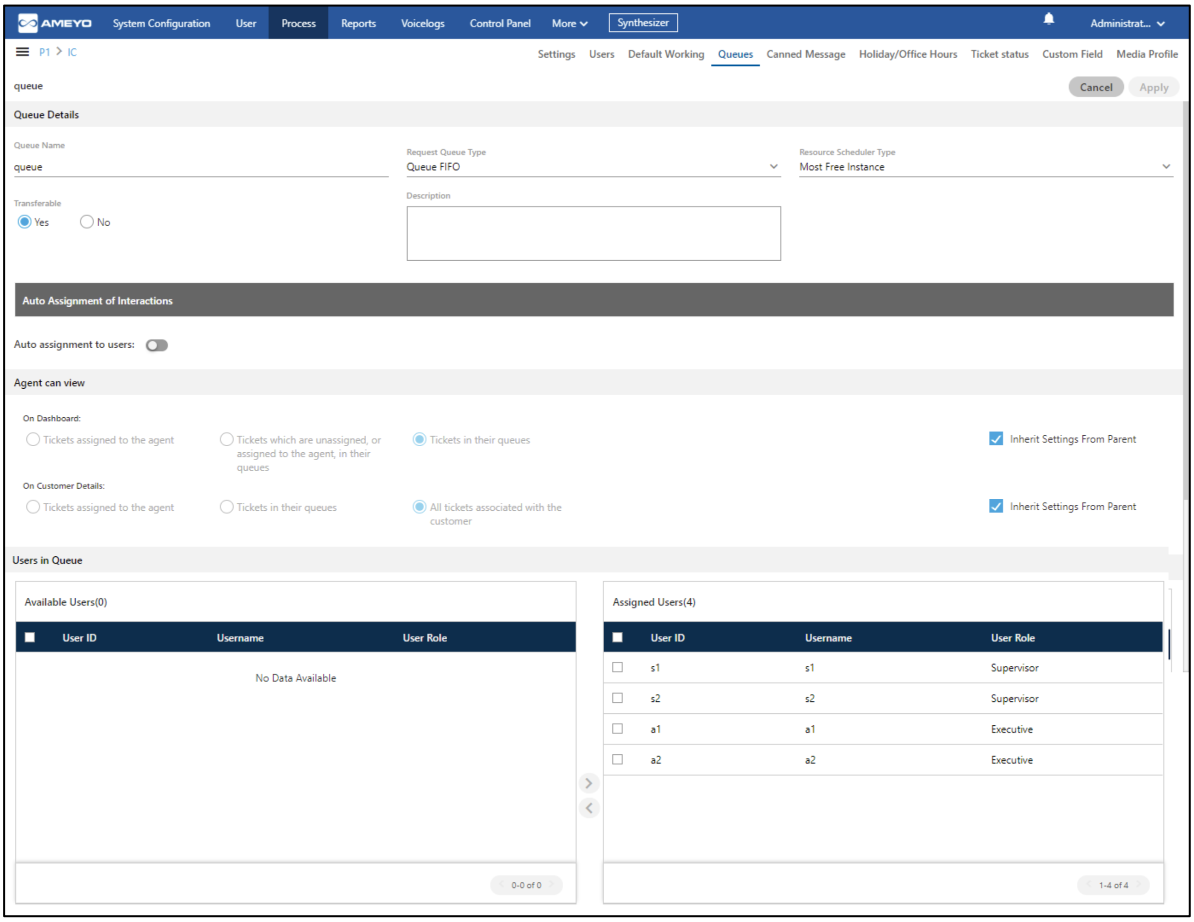


Figure: Edit the Queue

While editing the queue, the administrator can change the settings of the tickets and assign and unassign the agents from the queue.

11.2.2.3 Delete Queue

You can delete the queue. Select the queue, which you want to delete and then, click "Delete" icon. A confirmation modal displays.

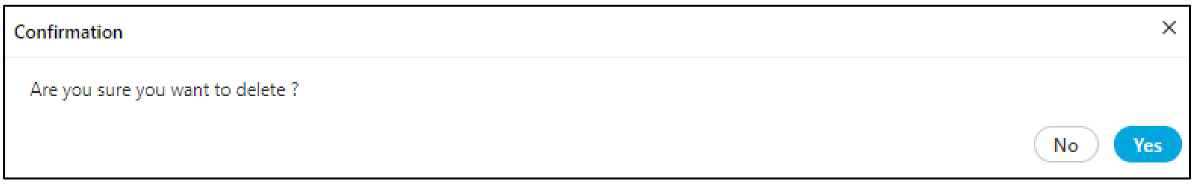


Figure: Delete Queue

Click "Yes" button to confirm the deletion of the queue, else click "Cancel".

11.2.3 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.

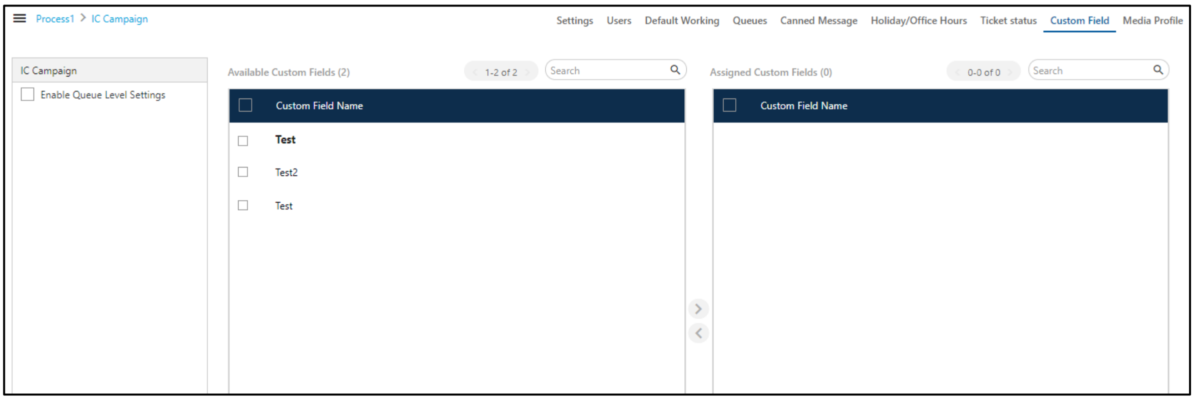


Figure: Custom Fields

11.2.3.1 Campaign Level Custom Fields

Perform the following steps to assign custom fields to the campaign.

1. Create the Queue in the Interaction Campaign first. [Know more...]
2. Switch the tab to Custom Fields of IC Campaign.
3. All the Custom Fields created at the process level are shown in the "Available Custom Field Section.
4. Select the Custom Fields which you want to assign in the campaign.
5. Click  icon to assign the selected custom fields.

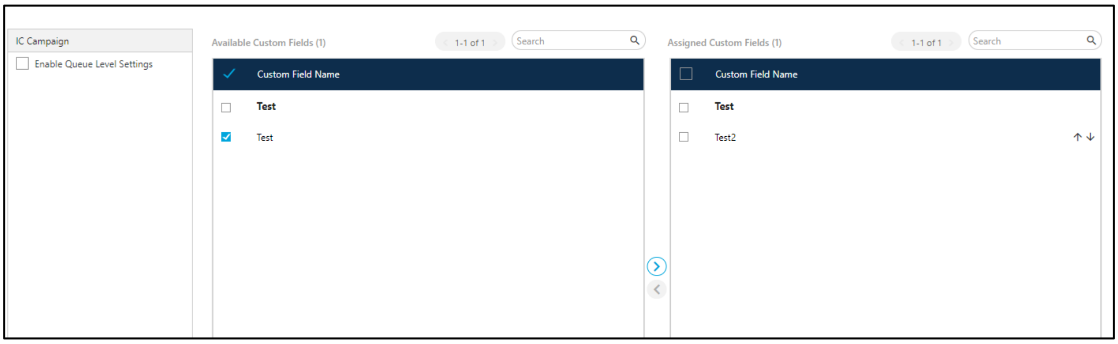
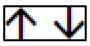
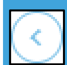


Figure: Assign or Unassign Custom Fields on campaign

6. Click "Apply" to assign the custom fields to this campaign. Rather, you can click "Refresh" to not assign the custom fields.
7. You can change priority of the custom fields in the assigned column of the custom fields. Click  icon to change the priority of the assigned 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.

11.2.3.2 Queue Level Custom Fields

Perform the following steps to assign the custom fields to the particular queue.

1. Enable the "Queue Level Settings" check-box present in the left bar of the page.
2. After enabling the settings, all the queues which are created in the Campaign start showing in the list.
3. Click on the queue on which you want to assign the custom fields. The same page to assign the custom fields comes up.
4. All the Custom Fields created at the process level are shown in the "Available Custom Field Section.
5. Select the Custom Fields which you want to assign in the queue.
6. Click  icon to assign the selected custom fields.

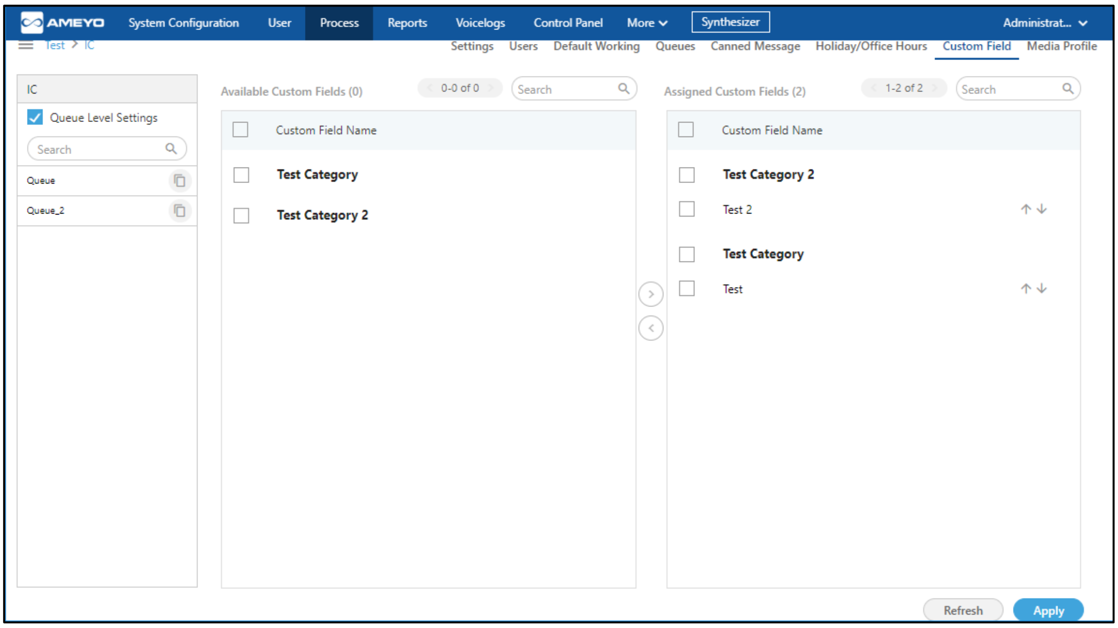


Figure: Assign or Unassign Custom Fields on queue

Perform the same steps to assign the custom fields to other queues.
If any custom field is assinged or unassigned to a campaign or queue, then the agents staffed to that queue or campaign are not required to logout and relogin to see the impact.

11.2.3.3 Copy settings to other Queues

If all the custom fields assigned to one queue is same for the other queue, then you can copy all the settings to other queue with one-click. It allows the administrator to copy all the settings to one to another. Perform the following steps.

1. Click  icon present adjacent to the queue name. A new pop-up arises.

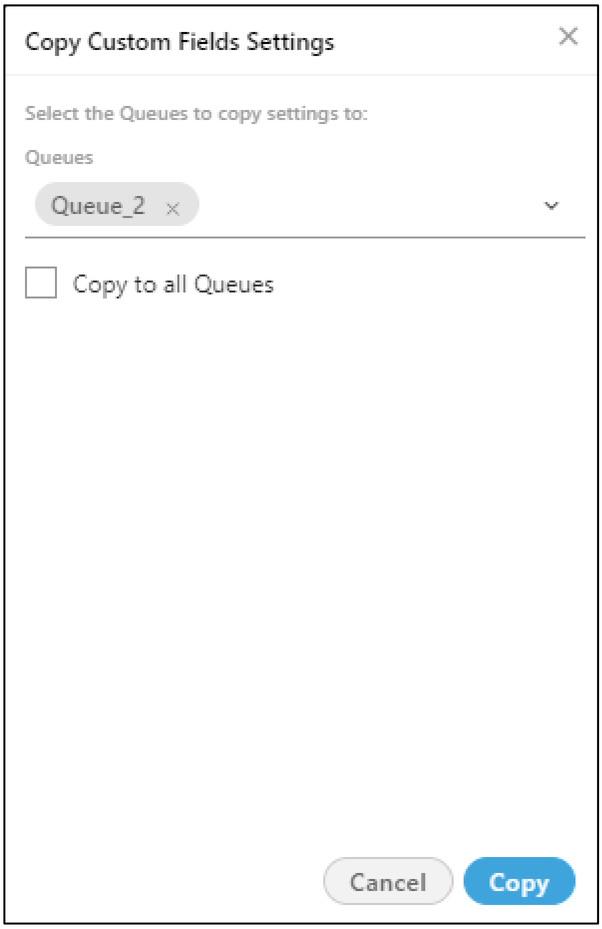


Figure: Copy settings

2. Select the queue in which you want to change the settings.
3. Enable the "Copy to all Queues" check-box if you want to copy the settings to all the existing queues of the campaign.
4. Click "Copy" button to proceed with the coping action. A pop-up for the confirmation comes up.

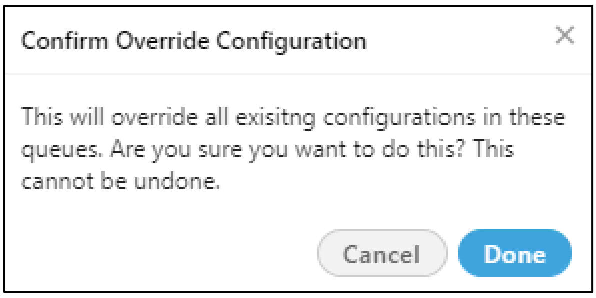


Figure: Confirm the copy process

5. Click "Done" on the arrived pop-up to confirm the copy process else click "Cancel" button to undone the process.

The copy process will override all the settings to the new queue and the previous settings of that queue cannot be retrieved in any manner.

11.2.3.4 Hiding Custom Field at Queue Level

The administrator is able to hide some of the custom fields at queue level which are not useful for the organization.

INSERT INTO ic_configuration_parameter (contact_center_id,name,value) VALUES ('<Contact_center_Id>','queueCustomFieldHideSetting','{"<Queue_ID_1>":["Field_Name"],"<Queue_ID_2>":["<Field_Name>"],"<Queue_ID_3>":["<Field_Name>"]}');

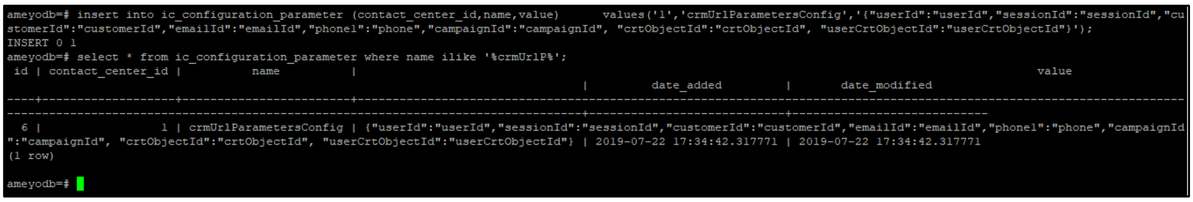


Figure: Hiding Custom Field Parameters

In the above query, provide the queue id and the fields according to the need. You can hide more custom fields at queue level at the same time. Provide all the custom fields according to the queues.

11.2.4 Ticket Status in Interaction Campaign

This Tab lets you assign and unassign the external ticket status to this campaign. All created Ticket Status in the System Configuration tab and the same will be shown here. Refer to "Ticket Status" at System Configuration to know the steps to create the external ticket status.

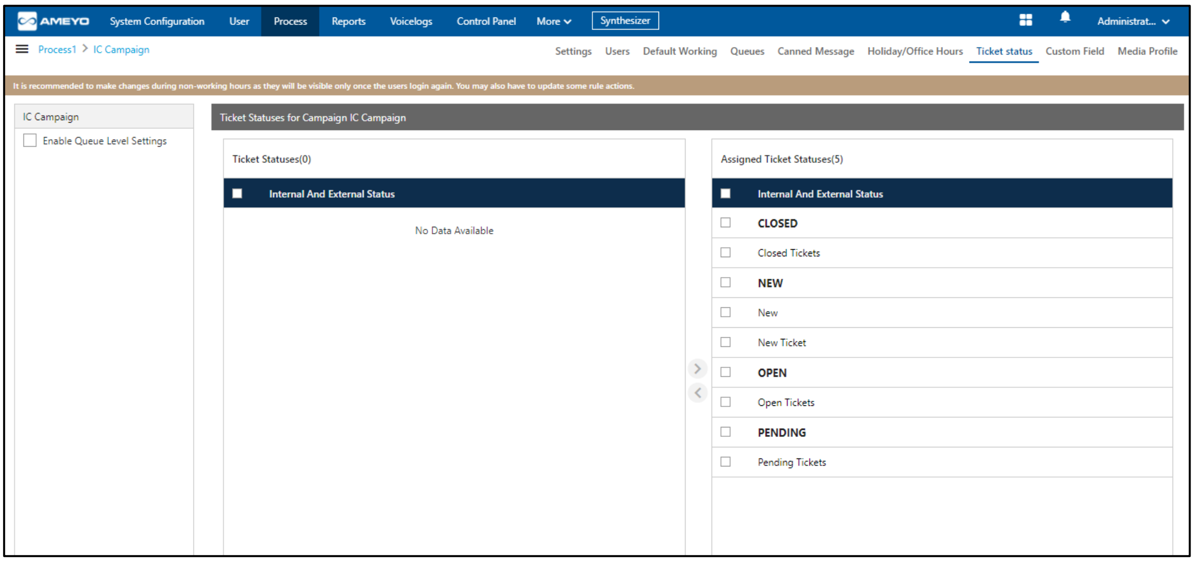


Figure: Ticket Status

11.2.4.1 Campaign Level Ticket Status

Perform the following steps to assign ticket status to the campaign.

1. Create the Queue in the Interaction Campaign first. Know more...
2. Switch the tab to Ticket Status of IC Campaign.
3. All Ticket Statuses created at the system level are shown in the "Available Ticket Statuses Section.
4. Select the Ticket Status which you want to assign in the campaign.
5. Click  icon to assign the selected ticket status.

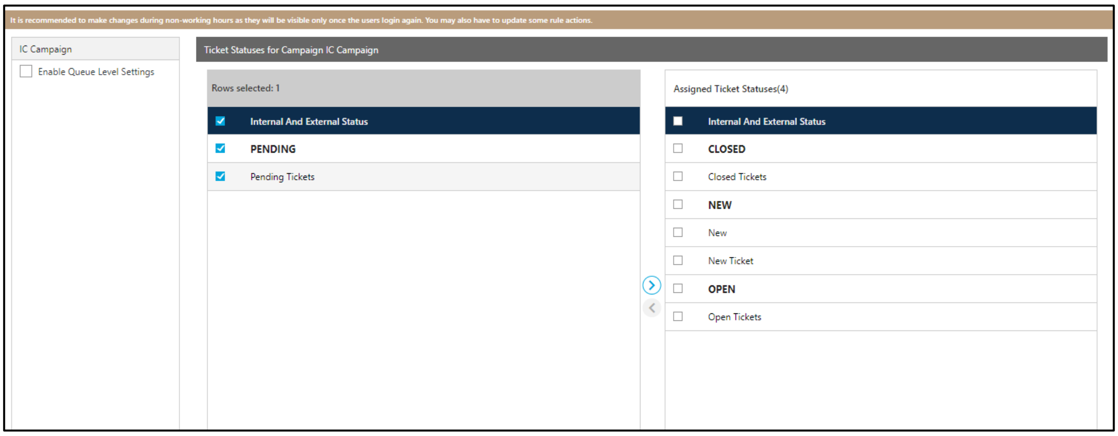


Figure: Assign or Unassign Ticket Status in campaign

6. Click "Apply" to assign the ticket status to this campaign. Rather, you can click "Refresh" to not assign the ticket statues.

To unassign a ticket status, select it in "Assigned ticket statuses" section, click  icon, and click "Apply" to unassign the selected ticket status from the campaign.

11.2.4.2 Queue Level Ticket Status

Perform the following steps to assign the ticket status to the particular queue.

1. Enable the "Queue Level Settings" check-box present in the left bar of the page.
2. After enabling the settings, all the queues which are created in the Campaign start showing in the list.
3. Click on the queue on which you want to assign the ticket status. The same page to assign the ticket status comes up. By default, all ticket statues are assigned to that queue, or it follows the assignment done at the campaign level.
4. All the Ticket Status created at the process level are shown in the "Available Ticket Statuses Section.

5. Select the Ticket Status which you want to assign in the queue.

6. Click icon to assign the selected ticket status.

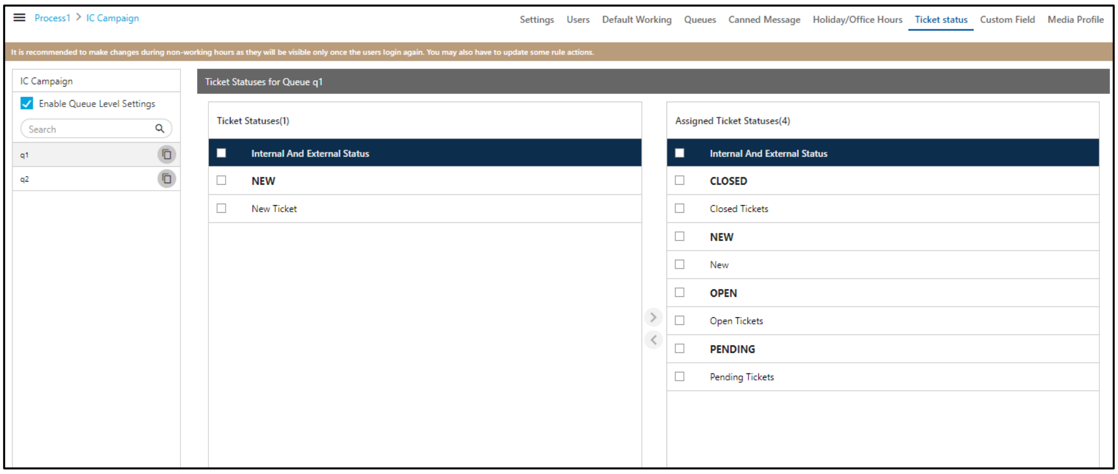


Figure: Assign or Unassign Ticket Status on queue

Perform the same steps to assign the ticket status to other queues.

If any ticket status is assinged or unassigned to a campaign or queue, then the agents staffed to that queue or campaign are not required to logout and relogin to see the impact.

11.2.4.3 Copy settings to other Queues

If all the ticket status assigned to one queue is same for the other queue, then you can copy all the settings to other queue with one-click. It allows the administrator to copy all the settings to one to another. Perform the following steps.

1. Click icon present adjacent to the queue name. A new pop-up arises.

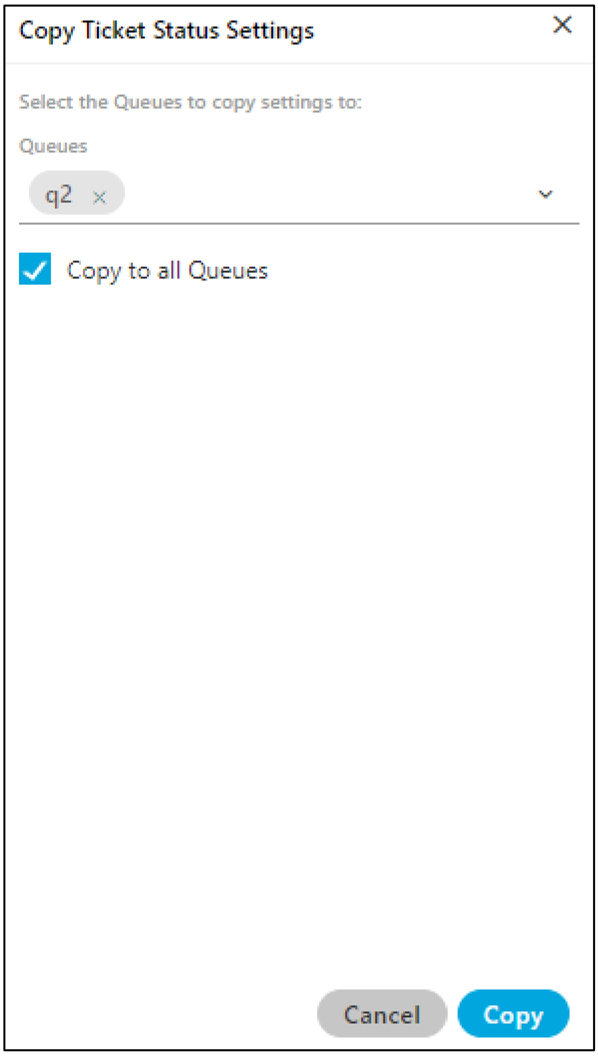


Figure: Copy settings

2. Select the queue in which you want to change the settings.
3. Enable the "Copy to all Queues" check-box if you want to copy the settings to all the existing queues of the campaign.
4. Click "Copy" button to proceed with the coping action. A notification will be shown on the screen notifying about the success of the copy process.

Figure: Notification shown

11.2.5 Backend Configurations for Interaction Campaign

There are several configurations through which the User (who has administrative privileges over the Server OS running Ameyo Application server) is able to optimize the Ameyo and increase it's usage according to the organizational need.

All of these queries will be executed for the product database. Execute the following command to login to the database.

psql -U postgres <database_name>

The database name in the above command is the name of the database which is configured to run the Application Server. For example, ameyodb is the product database in our test case.

11.2.5.1 Open CRM on Agent Screen

Execute the following query to enable the CRM tab on Agent's screen.

INSERT INTO ic_configuration_parameter (contact_center_id,name,value) VALUES('<Contact_center_Id>','crmUrlParametersConfig','{"userId":"userId", "sessionId":"sessionId", "customerId":"customerId","emailId":"emailId","phone1":"phone","campaignId":"campaignId", "crtObjectId":"crtObjectId", "userCrtObjectId":"userCrtObjectId"}');

Figure: CRM Parameters on Agent Screen

Administrator can modify the values used in the above query according to the use of organization.

11.2.5.2 Increase Bucket Size of Ticket Extensions

Administrator can increase the size of the ticket extensions which can be provided to the user. It allows the agent to increase the size of the tickets which can be handle at a particular time by the agent.

Execute the following query.

INSERT into ic_configuration_parameter (contact_center_id,name,value) VALUES ('<Contact_center_Id>','allowedInteractionExtension','<number_of_ticket>');

Figure: Increase Ticket Bucket Size

11.2.5.3 Disable Customer Edit Privilege

Administrator can now disable the rights to edit the customer's informations by agent. The customer's information can only be edited by the supervisor or the administrator only and agent can not perform any editing operation on the customer's information.

Execute the following query.

INSERT INTO server_preference_store (context_type,context_id,key,value) VALUES ('contactCenter','<Contact_center_Id>','customerEditPrivilege','false');

Figure: Disable Customer Edit Privilege

If you want to enable the editing rights again then use the following query. INSERT INTO server_preference_store (context_type,context_id,key,value) VALUES ('contactCenter','<Contact_center_Id>','customerEditPrivilege','true');

11.2.5.4 Disable Customer Sentiments

Administrator can stop Ameyo to calculate the customer's sentiments on tickets. For more information on Customer Sentiments click here...

Execute the following query.

INSERT INTO server_preference_store (context_type,context_id,key,value) VALUES ('contactCenter','<Contact_center_Id>','disableCustomerSentiments','true');

Figure: Disable Customer sentiments

By default the value of the values of the customer's sentiments are false. You have to make it true in order to make it disable.

11.2.5.5 Enable CRM for Voice in Voice+IC Setup

Administrator can enable the CRM wizard in the Voice+IC setup where both the setups are in use at the same time.

- Execute the following query to enable the CRM at System level, that is, for all the Processes and Campaigns.

  INSERT into server_preference_store(context_type,context_id,key,value) VALUES ('contactCenter','<Contact_center_Id>','isVoiceCrmInInteractionCampaignEnabled','true');

- Execute the following query to enable the CRM at any specific Process level,that is, for all the Campaigns assigned in the Process.

  INSERT into server_preference_store(context_type,context_id,key,value) VALUES ('process','<Process_Id>','isVoiceCrmInInteractionCampaignEnabled', 'true');

Figure: Enable CRM for Voice in Voice+IC Setup

11.2.5.6 INSERT the Chat channel Icon on Tickets

In Ameyo, the administrator can set the icons for the different chat channels, like for the chat ticket coming from WhatsApp media, then the WhatsApp icon will start displaying in front of the WhatsApp ticket, likewise for the ticket coming from facebook messenger, the facebook messenger icon will start showing in front of tickets.
It helps the agent or supervisor to identify easily that which ticket has been created from which media profile.

Execute the following query.

INSERT into ic_configuration_parameter (contact_center_id,name,value) VALUES(<contact_center_id>,'chatChannelConfigured','WEBCHAT,TWITTER_DM,MESSENGER');

You can use single type of chat channel icon at a time or multiple as well. In the above query, the value column of the table contains the names of the of the chat channels. You can use **TELEGRAM, LINE, VIBER, WEBCHAT and ANDROID** also.

Figure: Chat Channel Icons on Ticket

11.2.5.7 Fetcher Timer Job

Fetcher time is the time after which Ameyo tries to checks for any new tickets. The administrator can set the fetcher time according to the use. By default, the time is 60 seconds.

Execute the following query.

INSERT into ic_configuration_parameter (contact_center_id,name,value) VALUES

('<contact_center_id>','fetchTimerStartIntervalInSeconds','<Time_in_second s>');

Figure: Fetcher time job

11.2.5.8 Customer Toggling Feature

Ameyo provides the feature of toggling the customer's email id from "From" bar of email to "TO" bar of email. It means that whenever any customer sends the ticket, then the customer's email id would be labeled as the Sender's email id, but after enabling the toggling customer feature, the customer's email id will automatically copied to the "Receiver's" email id whenever any agent replies on the same ticket. It helps to save the time of the agent as the email id of customer automatically marked as the receiver's id and, the agent has not to write the customer's email id.

Execute the following query

INSERT into ic_configuration_parameter (contact_center_id,name,value) VALUES ('<contact_center_id>','makeCustomerFromTargetEmail','<configured_Email _id>');

The "Configured_Email_id" is the email id which is configured for the email media profile.

Figure: Customer Toggling Feature

11.2.5.9 Reopen Closed Ticket

If the administrator do not want to reopen the tickets which are already closed, then a flag is needed. If such case occurs, then execute the following query.

INSERT into server_preference_store (context_type,context_id,key,value) VALUES('contactCenter','<contact_center_id>','shouldExcludeCloseInteractions','true');

Figure: Disable to Reopen closed ticket

11.2.5.10 Disable the Auto-assignment of tickets

If you want to disable the auto-assignment of the tickets from any of the specific queues, then execute the following query.

INSERT into ic_configuration_parameter (contact_center_id,name,value) VALUES (1,'excludedQueuesFromInteractionAutoAssignment','>Queue_ids<');

Figure: Disable to Reopen closed ticket

If you want to disable the auto-assignment feature for multiple queues, then enter multiple queue id's separated by comma.

11.2.5.11 Download Lazy Email Attachment

There were many cases when the email sent through customer has some attachments of larger size. While fetching those emails, a lot of time consumed due to the attachment, and hence it cause a significant delay to fetch that email, which results delay in fetching of another tickets also. Now Ameyo introduced a feature through which the administrator can configure the system so that the text of the email fetches first and the attachments will fetch later. It helps to reduce the time of fetching another email tickets as well.

Before configuring the lazy download of attachments, there are some cases which needs to be in taken care.

1. This feature will only work with “IMAP” and “EWS” protocol. If “POP” protocol is used, then this feature will not work, because POP does not allow re-fetching of the emails, as all the email get deleted once they fetched from the server. Hence the user must be either in “IMAP” or “EWS” protocol.
2. If Ameyo system is configured to delete the email once they fetched, then this feature will not work, as it is needed to fetch the email again to download the attachments. In this case, the administrator has to disable the auto-delete option of emails.

Perform the following steps configure this feature.

1. **Enable the Feature:** Execute the following query to enable this feature.

   INSERT into server_preference_store (context_type,context_id,key,value) VALUES('mediaProfile','<Media_Profile_Id>','attachmentLazyDownload','true');

   Figure: Enable Lazy Download of Tickets

2. **Download according to Size of Attachment:** You can also define the size of the attachment, so that the attachments greater than the specified limit will download later and the file less than the defined size will download first. Execute the following query.

   INSERT into server_preference_store (context_type,context_id,key,value) VALUES('mediaProfile','<Media_Profile_Id>','attachmentSizeConfigInBytes','<Size_in_KB>');

Figure: Configuring Lazy Download with size of the attachments

3. **Parallel Download Configuration:** You can also configure the total number of download options which can run and download lazy attachments parallel with other tasks. Here you have to define the total number of threads to download. There are two possible cases for this.

   - Execute the following query to configure the total number of downloading options for large attachments.

     ```
     INSERT into server_preference_store (context_type,context_id,key,value) VALUES('mediaProfile','<Media_Profile_Id>','largeAttachmentDownloadJobExecutorConfig','{"executerCapacity":2,"conveyorCapacity":4,"conveyorMinThreshold":2,"conveyorPollingTime":30}');
     ```

   - Execute the following query to configure the total number of downloading options for small attachments.

     ```
     INSERT into server_preference_store (context_type,context_id,key,value) VALUES('mediaProfile','<Media_Profile_Id>','smallAttachmentDownloadJobExecutorConfig','{"executerCapacity":2,"conveyorCapacity":4,"conveyorMinThreshold":2,"conveyorPollingTime":30}');
     ```

4.

5. **Figure:** Configuring size of Lazy Download of Attachments

The Media_Profile_Id is the id of the media profile in which you want to allow the lazy download option. Execute the following query to locate to the media profile id.
select * from media_profile;

11.2.5.12 Display order of Customer Information

It is possible to define the order of the customer information, irrespective of the order of the information present in the data table. Execute the following query to define the order of the customer information.

Figure: Display order of Customer Information

You can define multiple customer information field which are defined in data table separated by comma.

11.2.5.13 Enable SMS tab in Ameyo

If you are using SMS as media profile in Ameyo and want to enable the SMS tab on then execute the following query.

INSERT into server_preference_store (context_type,context_id,key,value) VALUES('contactCenter','<contact_center_id>','showSmsTab','true');

Figure: Enable SMS tab on Ameyo

11.2.5.14 Execution time for Automation Rules

The administrator can configure the time for all the Timer-Based rules. It means that the administrator can change the default execution time for all the timer rules defined in Ameyo. Exeecute the following query.

INSERT into server_preference_store (context_type,context_id,key,value) VALUES('contact_center','<contact_center_id>','automationRuleTimerProperties',{"interval":"PER_<time_in_minutes>_MIN","MINUTE":"00"}');

Figure: Change the default time of Timer Rules

11.2.5.15 Unassign the Reopened Ticket

Execute the following query to make the ticket state to unassign, when a ticket gets reopened.

INSERT into server_preference_store (context_type,context_id,key,value) VALUES ('contactCenter','<contact_center_id>','reAssignReopenedInteractions','false');

Figure: Unassign the Reopened ticket

11.2.5.16 Collapsible Customer's Information on Ticket Page

Execute the following query to make the customer's information tab collapsible on the agent's ticket screen.

INSERT into server_preference_store (context_type,context_id,key,value) VALUES ('contactCenter','<contact_center_id>','customerInfoInTicketPageCollapsed', 'false');

Figure: Enable collapsible Customer's Information on Ticket Page

11.2.5.17 Collapsible Customer's Information on Customer's Tab

Execute the following query to make the customer's information tab collapsible on the agent's customer's information screen.

INSERT into server_preference_store (context_type,context_id,key,value) VALUES ('contactCenter','<contact_center_id>','customerInfoInTicketPageCollapsed', 'false');

Figure: Enable collapsible Customer's Information on Customers Page

11.2.5.18 Disable Advance Filter Option

Execute the following query to disable the advance filter option from closed ticket dashboard of agent's screen.

INSERT into ic_configuration_parameter (contact_center_id,name,value) VALUES ('<contact_center_id>','is_advance_filters_disabled_on_closed_interaction_dashbaord','true');

Figure: Disable Advance Filter Option from Closed Ticket Page

11.2.5.19 Provide the default date selection of tickets

The administrator can configure the default time range for all the interaction campaigns assigned agents. It means that if the administrator configured the date range, let's say for 2 months, then the tickets from last 2 months from today will appear. However, agent can change the date range to see other tickets.

There are three cases possible for which the date range can be set.

1. **For Closed Tickets:** Execute the following query to set the date range for closed tickets dashboard.

   INSERT into ic_configuration_parameter (contact_center_id,name,value) VALUES ('<contact_center_id>','closed_interaction_dashboard_default_date_filter_range','<number_of_months>');

2. **For Tickets on Dashboard:** Execute the following query to set the date range for the tickets on dashboard screen.

INSERT into ic_configuration_parameter (contact_center_id,name,value) VALUES ('<contact_center_id>','interaction_dashboard_default_date_filter_range','<number_of_months>');

3. **For Customer's tab:** Execute the following query to set the date range for the customer's tab on dashboard.

   INSERT into ic_configuration_parameter (contact_center_id,name,value) VALUES ('<contact_center_id>','customer_interaction_dashboard_default_date_filter_range','<number_of_months>');

Figure: Define date range for Tickets

11.2.5.20 Configuration of Auto-Expiry Duration of Tickets

By default, if not configured, then no auto-expiry time will be set for the tickets. You have to execute the following command to configure the Auto-Expiry limit for the tickets.

insert into system_configuration_parameter (name,type,value,default_value) values ('autoExpiryInteractionIntervalInDays','Integer','<No_of_days>','<No_of_days>');

Figure: Auto Expiry of Ticket Configuration

We recommend to provide the value of "No_of_days" greater than 90 days. This is because the minimum value of the auto-expiry time is 90 days. If you are configuring the auto-expiry limit for less than 90 days, then upon restart of Ameyo AppServer, the auto-expiry limit will be reset to 90 days automatically.

The auto-expiry time will start from the date of creation of the tickets. Only those tickets, which are in "CLOSED" state, will be marked for expiry after reaching this limit and will not be visible in the system.

If the Auto-Expiry Duration for an Open or Pending Ticket is exceeded, then that ticket will expire only when any user closes that ticket.

If you want to the tickets should be visible and should not expire after the defined auto-expiry limit from their creation dates (after being closed), then you have to use the above command to increase the auto-expiry limit.

11.2.5.20.1 Configure the Timer Job for Auto-Expiry of Tickets

You can use the following query to run the job of auto-expiry of tickets.

INSERT into system_configuration_parameter(name,type,value,default_value) VALUES('autoExpiryTimerIntervalInHours','Integer','<Number_of_Hours>','< Number_of_Hours>');

Replace <Number_of_Hours> with the hours after which you want to run the job of auto-expiry

A closed tickets set for expiry will be expired only after running of this job.

11.2.6 Backend Configurations for Voice plus Interaction Campaign

There are several configurations through which the User (who has administrative privileges over the Server OS running Ameyo Application server) is able to optimize the Ameyo and increase it's usage according to the organizational need.

All of these queries will be executed for the product database. Execute the following command to login to the database.

psql -U postgres <database_name>

The database name in the above command is the name of the database which is configured to run the appserver. For example, ameyodb is the product database in our test case.

11.2.6.1 Disable Auto-Creation of Interaction Tickets

In Ameyo, all communication corresponding to the Voice or Chat are created as ticket. However, the User can disable the auto-creation of tickets for voice or chat.

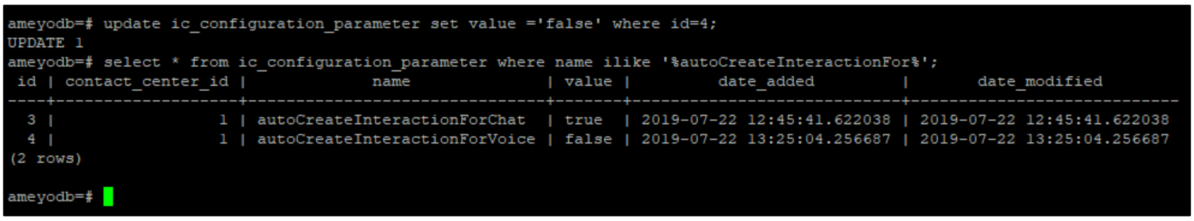
Following are the queries to disable the Auto-Creation of tickets.

- **Disable Auto-Creation for Voice:** Execute the following query to disable the Auto-Creation of voice tickets.

  update ic_configuration_parameter set value ='false' where name ilike 'autoCreateInteractionForVoice%';

- **Disable Auto-Creation for Chat:** Execute the following query to disable the Auto-Creation of chat tickets.

  update ic_configuration_parameter set value ='false' where name ilike 'autoCreateInteractionForChat%';



```
ameyodb=# update ic_configuration_parameter set value ='false' where id=4;
UPDATE 1
ameyodb=# select * from ic_configuration_parameter where name ilike '%autoCreateInteractionFor%';
 id | contact_center_id |             name              | value |         date_added         |       date_modified
----+-------------------+-------------------------------+-------+----------------------------+----------------------------
  3 |                 1 | autoCreateInteractionForChat  | true  | 2019-07-22 12:45:41.622038 | 2019-07-22 12:45:41.622038
  4 |                 1 | autoCreateInteractionForVoice | false | 2019-07-22 13:25:04.256687 | 2019-07-22 13:25:04.256687
(2 rows)

ameyodb=#
```

Figure: Disable Auto-Creation of Voice Interaction

The administrator can disable the creation of tickets for both chat and voice. However, it is not suggested to disable the auto-creation of tickets for Chat, as chats may contain some information which would have been needed to resolve.

11.2.6.2 Enable CRM for Voice in Voice+IC Setup

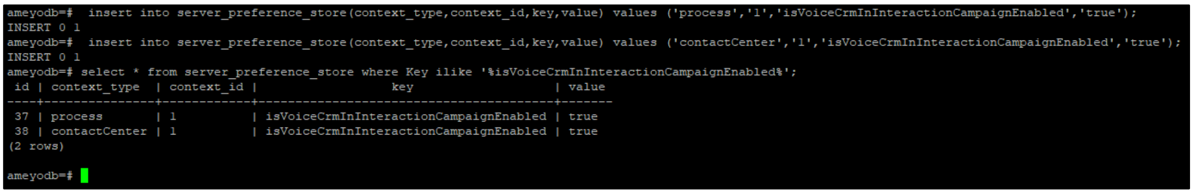
Administrator can enable the CRM wizard in the Voice+IC setup where both the setups are in use at the same time.

- Execute the following query to enable the CRM at System level, that is, for all the Processes and Campaigns.

  INSERT INTO server_preference_store(context_type,context_id,key,value) VALUES ('contactCenter','<Contact_center_Id>','isVoiceCrmInInteractionCampaignEnabled','true');

- Execute the following query to enable the CRM at any specific Process level,that is, for all the Campaigns assigned in the Process.

  INSERT INTO server_preference_store(context_type,context_id,key,value) VALUES ('process','<Process_Id>','isVoiceCrmInInteractionCampaignEnabled', 'true');


```
ameyodb=#  insert into server_preference_store(context_type,context_id,key,value) values ('process','1','isVoiceCrmInInteractionCampaignEnabled','true');
INSERT 0 1
ameyodb=#  insert into server_preference_store(context_type,context_id,key,value) values ('contactCenter','1','isVoiceCrmInInteractionCampaignEnabled','true');
INSERT 0 1
ameyodb=# select * from server_preference_store where Key ilike '%isVoiceCrmInInteractionCampaignEnabled%';
 id | context_type  | context_id |                  key                   | value
----+---------------+------------+----------------------------------------+-------
 37 | process       | 1          | isVoiceCrmInInteractionCampaignEnabled | true
 38 | contactCenter | 1          | isVoiceCrmInInteractionCampaignEnabled | true
(2 rows)

ameyodb=#
```

Figure: Enable CRM for Voice in Voice+IC Setup

11.2.6.3 Configurable CRM

If administrator wants to enable the CRM button on the customer's details page, then execute the following query.

INSERT INTO server_preference_store (context_type,context_id,key,value) VALUES ('campaign','<Interaction_campaign_id>','showConfigurableCrm','true');

Following are the expected behavior of the CRM after the above configuration.

1. **Create Ticket:** On the "Create Ticket" page of the agent dashboard screen, the CRM button will show.
2. **Open an existing Ticket:** When any existing ticket is opened, the CRM button is shown on the page "Ticket" page.
3. **Open the Customer:** Whenever any customer is opened in "Customer Tab" of dashboard, then "Collapsible" CRM would come.
4. **Calling Feature:** Whenever the call is made through the voice and IC setup, then "Collapsible" CRM will come.

11.2.6.4 Lite Ticket Creation

There is a need to make the configuration for the creation of lite tickets for Voice and Interaction campaign setup. Following are the various scenarios through which you can configure the lite ticket creation.

1. Execute the following query to create automatic interaction tickets for voice in closed state.

   INSERT INTO ic_configuration_parameter (contact_center_id,name,value) VALUES ('<Contact_center_Id>','externalStateForLiteInteraction','Closed');

2. Execute the following query to create lite tickets for voice.

   INSERT INTO ic_configuration_parameter (contact_center_id,name,value) VALUES ('<Contact_center_Id>','createLiteInteractionForVoice','true');

3. Execute the following query to create automatic lite tickets for interaction.

   INSERT INTO ic_configuration_parameter (contact_center_id,name,value) VALUES ('<Contact_center_Id>','autoCreateInteractionForVoice','true');

```
ameyodb=#  insert into ic_configuration_parameter (contact_center_id,name,value) values ('1','createLiteInteractionForVoice','true');
INSERT 0 1
ameyodb=#  insert into ic_configuration_parameter (contact_center_id,name,value) values ('1','externalStateForLiteInteraction','Closed');
INSERT 0 1
ameyodb=#  insert into ic_configuration_parameter (contact_center_id,name,value) values ('1','autoCreateInteractionForVoice','true');
INSERT 0 1
ameyodb=#
```

Figure: Lite ticket configurations

11.3 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 (Interactive Voice Application) and different (non-interactive voice application) campaigns.

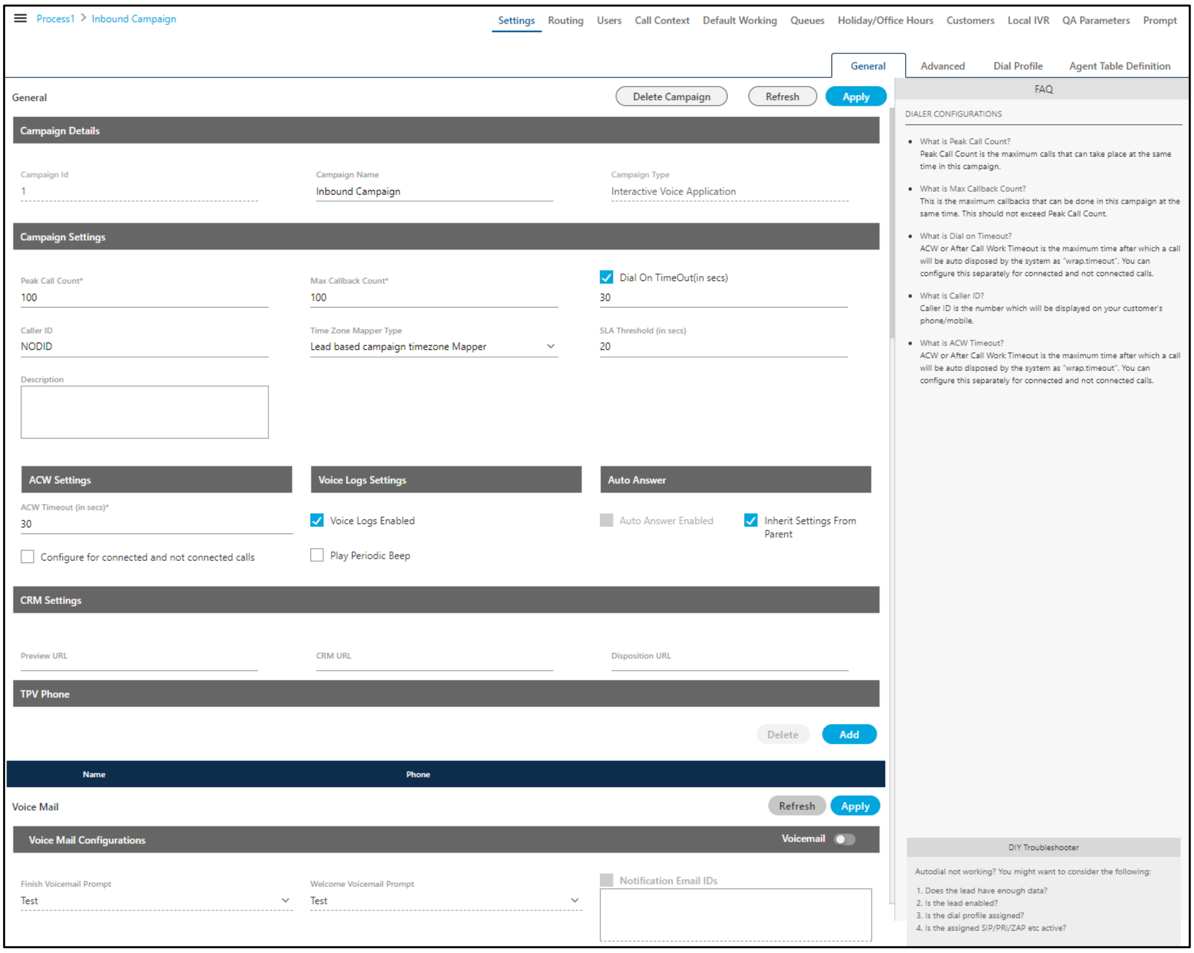


Figure: Settings of Interactive Voice Application Campaign

At the right side of the campaign settings page, some of the commonly asked definitions of settings are defined. You can refer to those definitions.

It contains the following tabs.

- Settings
  - General Settings
  - Advanced Settings
  - Dial Profile Settings
  - Agent Table Definition

- Queues
- Routing
- Users
- Default Working
- Holiday/Office Hours
- Call Context
- Local IVR
- QA Parameters
- Prompt

11.3.1.1 Settings Tab

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

11.3.1.1.1 General Settings

Here, the General Settings are divided into the following sections.

11.3.1.1.1.1 Campaign Details

These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.

11.3.1.1.1.2 Campaign Settings

Except for 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 these settings, the dialed calls will be disconnected after the provided seconds if not connected.

- **SLA Threshold (In Sec):** Here, you can specify the threshold in which the inbound calls should be answered ideally.
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- **Auto Answer Settings:** Auto-Answer Feature is already available for WebRTC with or without Ameyo SIP Agent Proxy. This feature did not require the implementation of "Accept-Reject" node in the Nodeflow to show the prompt at Ameyo User Console before answering the call.
  However, "Accept-Reject Node" was providing the Auto-Answer Configuration at the campaign-level and this feature was missing in Auto-Answer Feature for WebRTC.

  "Auto-Answer" section contains the following options and only one option will work at a time.

  1. **Inherit from Parent**: Select this option to inherit the Auto-Answer Configuration in the campaign from the System-level. If the Auto-Answer is disabled at the System-level, then it will remain disabled at the Campaign-level. If the Auto-Answer is enabled at the System-level, then it will remain enabled at the Campaign-level.
  2. **Auto Answer Enabled**: It will enable "Auto-Answer" at the Campaign-level forcefully even if it is disabled at the system-level. Refer to the following screenshot.

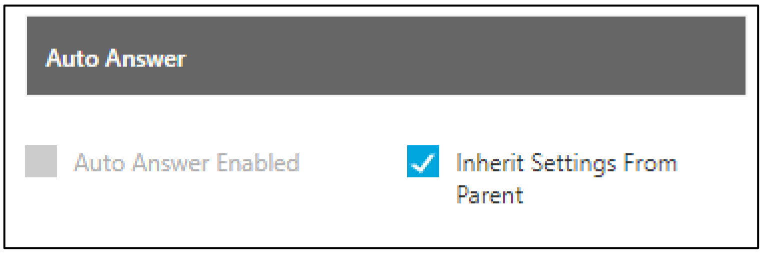


Figure: Auto-Answer Enabled

- **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 the verifier. Here, such frequently used TPV numbers are added so that the user can directly transfer the case to these numbers.

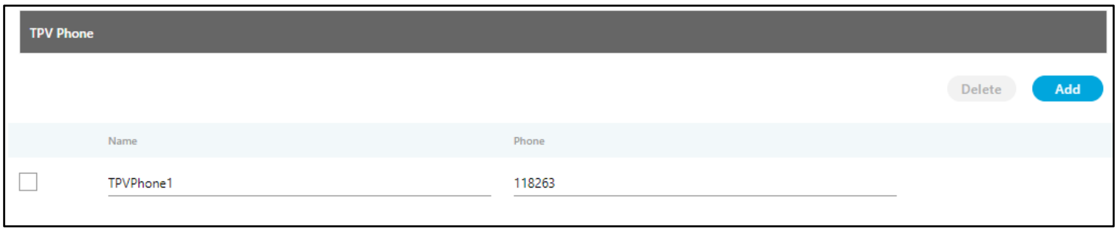


Figure: TPV Phone

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.

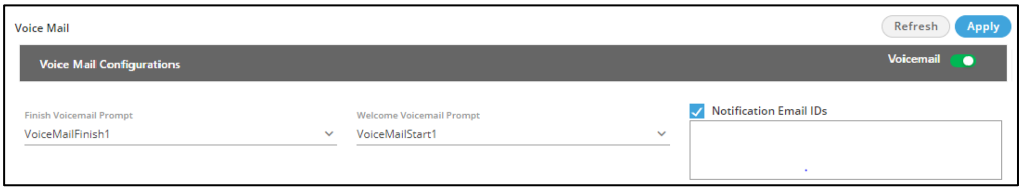
-
    - Click "Voicemail" toggle switch to turn it on.
    - **Welcome Voicemail Prompt:** Select the welcome voicemail prompt from the drop-down field.
    - **Finish Voicemail Prompt:** Select the finish voicemail prompt from the drop down field.
    - 

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 recipient's 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.

11.3.1.1.2 Advanced Settings

Here, the Administrator can configure the Advanced Settings of an Interactive Voice Application Campaign.

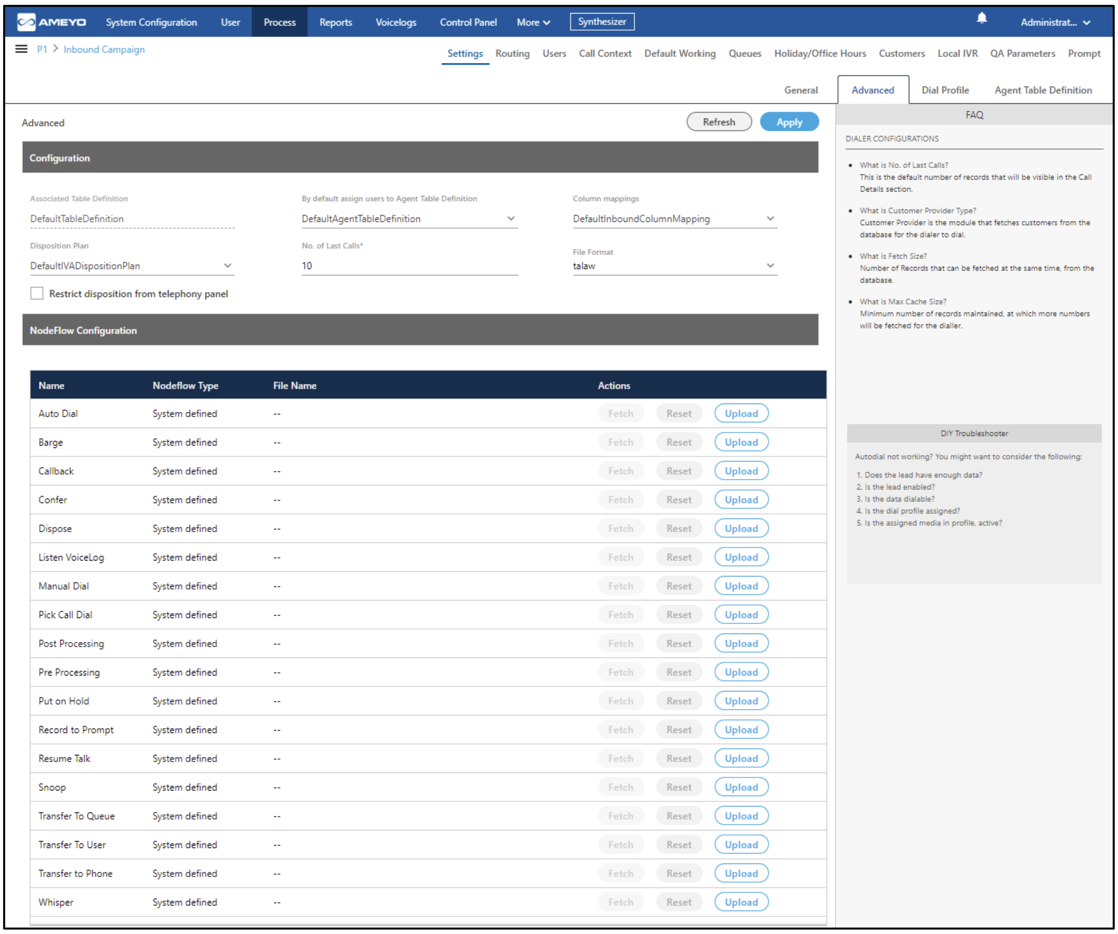


Figure: Advanced Settings

This tab can be divided into two sections - "Configuration" and "NodeFlow Configuration".

11.3.1.1.2.1 Configuration

It contains the following settings, which you have configured while creating the campaign.

- Disposition Plan
- Column Mapings

- No. of Last Calls
- File Format

It also contains the following settings, which you can configure after creating the Interactive Voice Application Campaign.

- **Defaut Table Definition:** Here, you can select the default Table Definition for this campaign.
- **By default assign users to Agent Table Definition:** Here, you can select the default Agent Table Definition for this campaign.

11.3.1.1.2.1.1. Restrict Disposition from Telephony Panel

In the Contact Center Industry, the business prefers to dispose of the Calls from the CRM, especially which is linked with Ameyo Application Server. The agents have two different ways to dispose of the single call - one through Telephony Panel and another through CRM. If the agent was disposing of the calls in both of the ways, then there will be two dispositions for a single call that can create confusion and discrepancy.

To avoid this discrepancy, a configuration named "Restrict disposition from Telephony Panel" is added in "Advanced" Tab of Voice Campaign Settings.

Brief about Settings

- **Uncheck (Default):** Uncheck this option to use the default or existing Call Disposition process. It means the agent can dispose of the call from both Telephony Panel and CRM.
- **Check:** Check this option to disable the call disposition at Telephony Panel and allow the agents to dispose of the call from CRM only.

By default, this option is unchecked due to which the agent will be able to dispose of the call from the Telephony Panel. However, if the Administrator has enabled it, then the agent will not be able to dispose of the call from the telephony panel.

We recommend that this option should be checked if the client is not using any CRM.

When Unchecked → Disabled (By Default)

If the option “Restrict Disposition from Telephony Panel” is unchecked, then the default or previous Call Disposition flow will work by default. The Agent can dispose of the call from Telephony Panel or CRM. However, it will not solve the use case addressed in this story.

When Checked → Enabled

The Administrator can check this option to restrict the disposition of calls in the Telephony Panel. The call cannot be disposed of from Telephony panel. The call has to be disposed of from the CRM only. As soon as the call is ended, the telephony panel will not slide out to the left side from the right bar. An error is displayed in the tooltip when the agent tries to dispose of the call from the telephony panel.

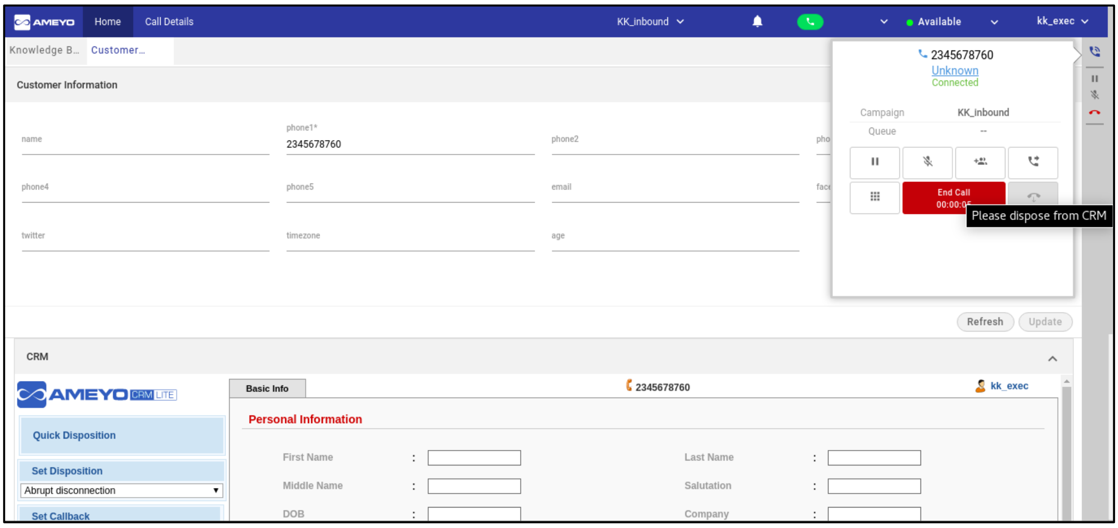


Figure: Disposition of Call is disabled in Telephony Panel

"ACW Timer" is displayed in the tooltip of the phone icon in the right panel after the call disconnection (since the telephony panel is not shown to the agent). When the agent disposes of the call from the CRM, then an inline message is displayed on the page.

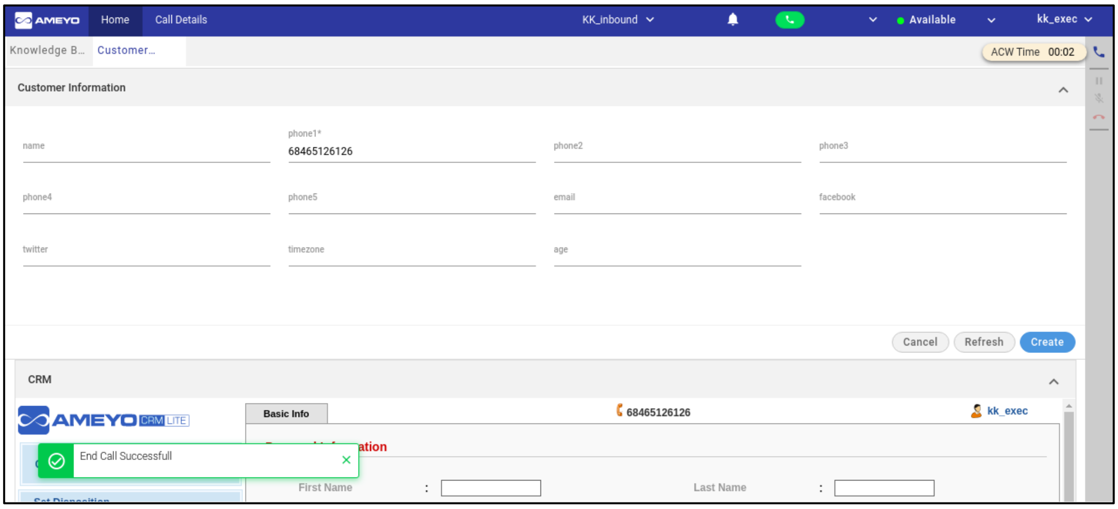


Figure: Disposed of the Call from CRM

Other Impacts if enabled

Dispose and Dial will also be performed through CRM. A REST API is also provided to perform the same.

Callback and call notes are understood in the normal disposition operation through the telephony panel only. If the call disposition is disabled from the telephony panel, then API is provided to handle the same while disposing of the call through CRM.

API Document: https://sites.google.com/a/ameyo.com/engineering/rest-apis-for-call-disposition-and-disposeanddial

11.3.1.1.2.2 Nodeflow Configuration

"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

11.3.1.1.3 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.

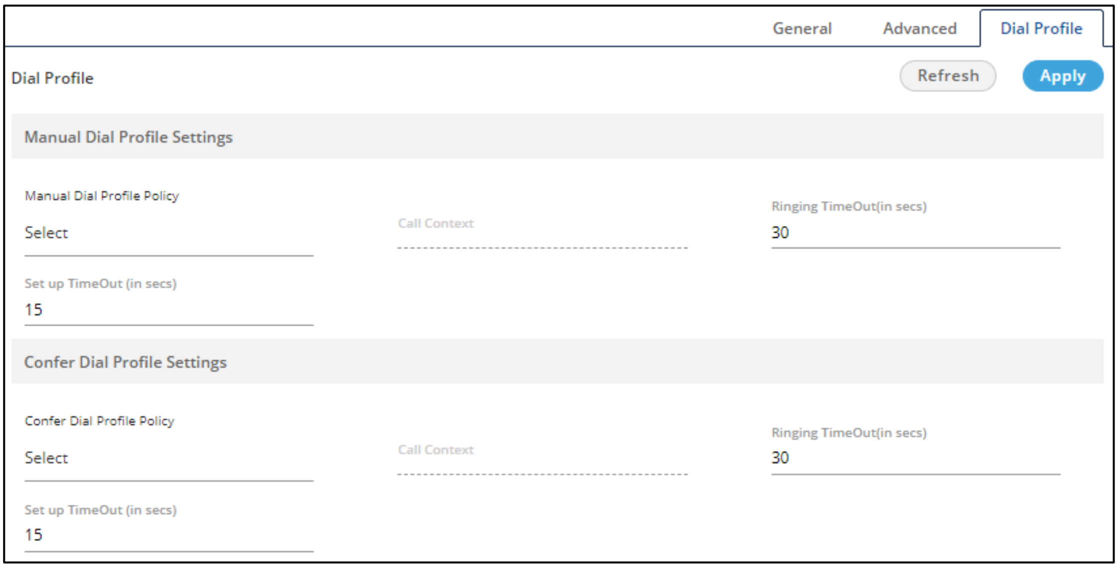


Figure: Dial Profile Settings

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.

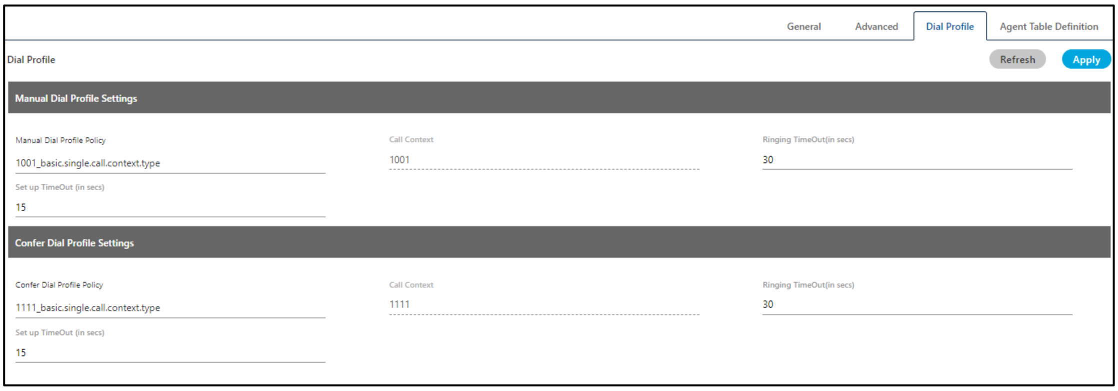


Figure: Configured Dial Profile Settings

11.3.1.1.4 Agent Table Definition

This tab allows you to select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition. Know more...

11.3.1.2 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...

11.3.1.3 Queues

Here, you can create and manage the queues. Know more...

11.3.1.4 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...

11.3.1.5 Customers

Here, the administrator can you can apply the Filter or Filter Groups for the campaign. This tab has been explained in "Outbound Campaign Settings". Know more...

11.3.1.6 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...

11.3.1.7 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**

11.3.2 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.

11.3.3 Queue Management in Voice Campaign

Queues Tab in the Voice Campaign Settings allows you to create and manage the queues.

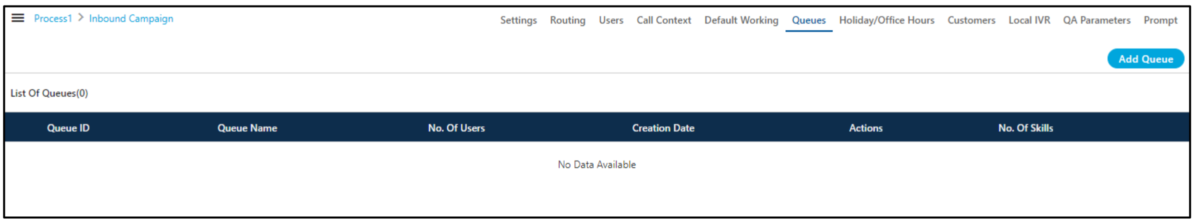


Figure: Queues Tab

11.3.3.1 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.

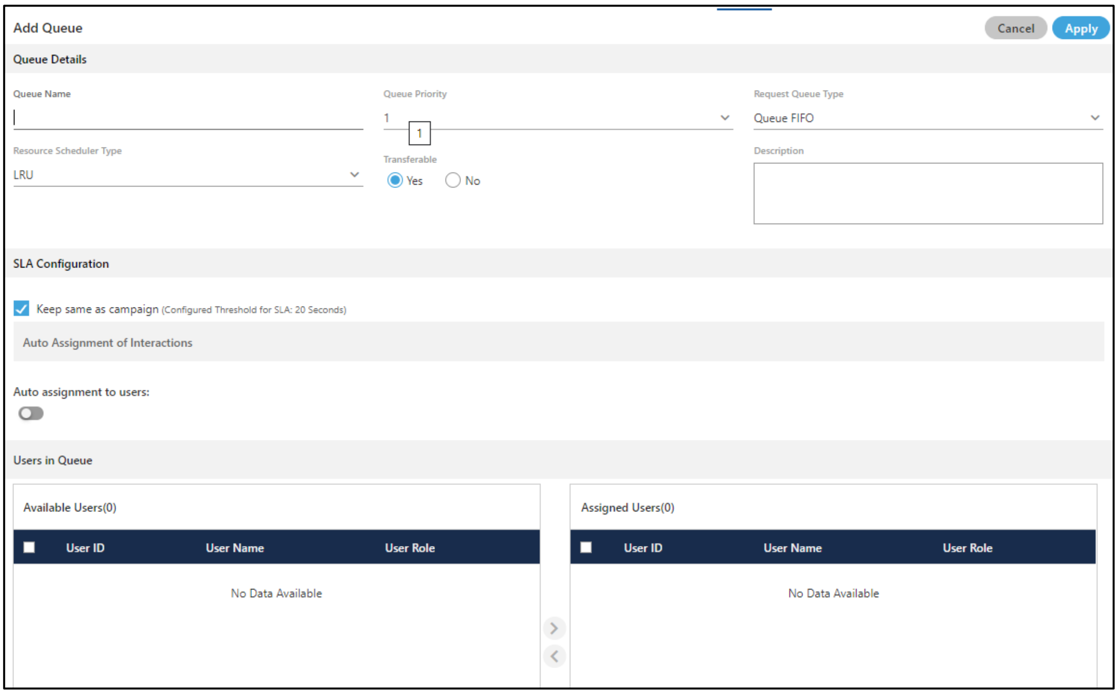


Figure: Create Queue

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 will 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. Queue with "1" priority will be selected first. Similarly, Queue with "2" priority will be selected at the second place.

   Example:

   Question: 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 what will happen? Let us go through the following table.

Queue	Queue Priority	Customer	Agent
Queue1	1	Customer1	Agent1
Queue2	2	Customer2	Agent1

C. **Answer:** In such a scenario, Agent1 will be connected first with "Customer1" as its queue - Queue1 - has higher priority.

5. **Resource Scheduler Type (Licensable):** 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 (Licensable):** Select it if the agents have multiple extensions and they are supposed to attend multiple communications (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. **Transferable:** Select it to transfer the communication call or chat from this new queue to another queue.
7. Provide a description for the queue.
8. **Assign Users in Queue:** Select the users in "Available Users" section and click icon.

> To unassign a user, select the users in "Assigned Users" and click icon.
> The user assignment is atomic in nature, that is not transactional. If some users out of all selected users could not be assigned because of any reason such as configuration, then allowed users will be assigned except those are failed to be assigned.

In the case of license restriction, the users of which license is not obtained will not be displayed in the section of available users.

9. **Assign Skills in Queue:** select the skills in "Available Skills" section and click  icon.

To unassign a skill, select the skills in "Assigned skills" and click  icon.

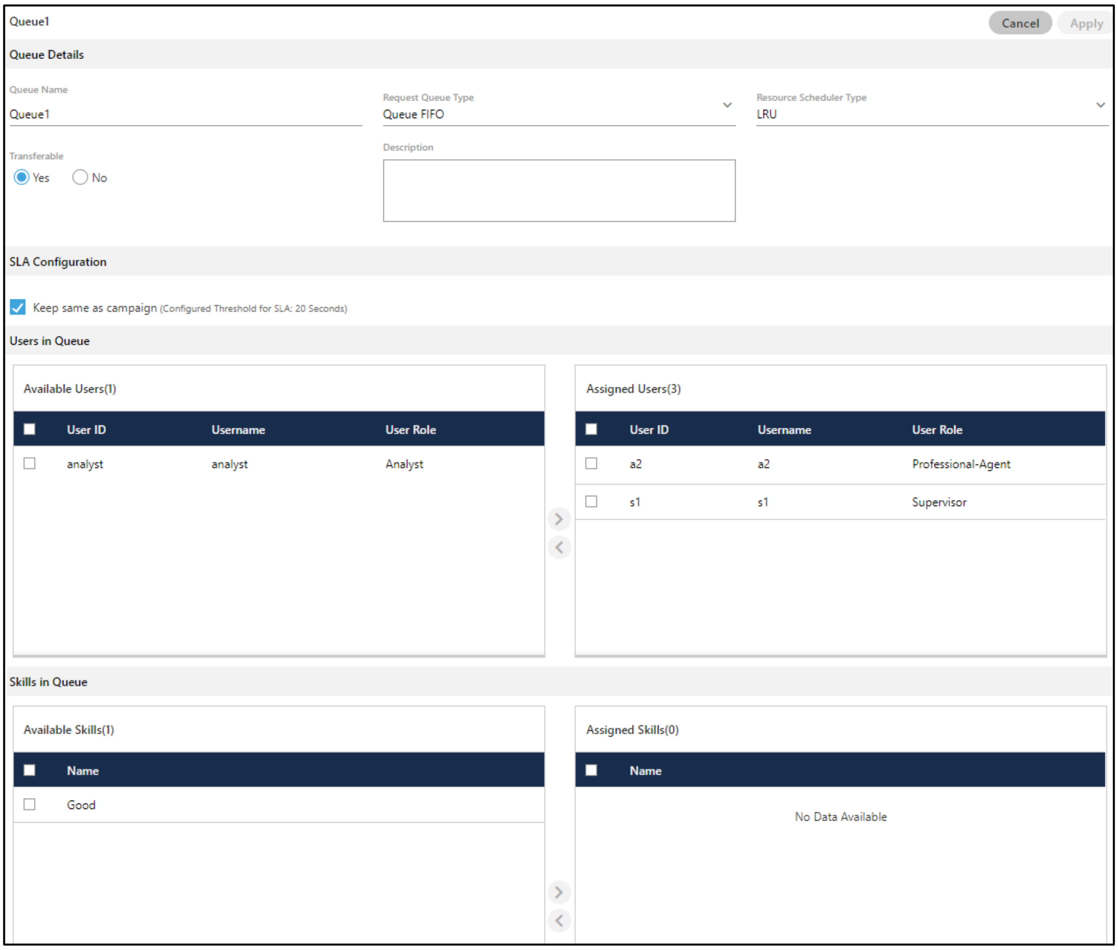


Figure: Sample Details to create a Queue

10. Click "Apply" to create the queue.

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

You can create multiple queues using these steps.

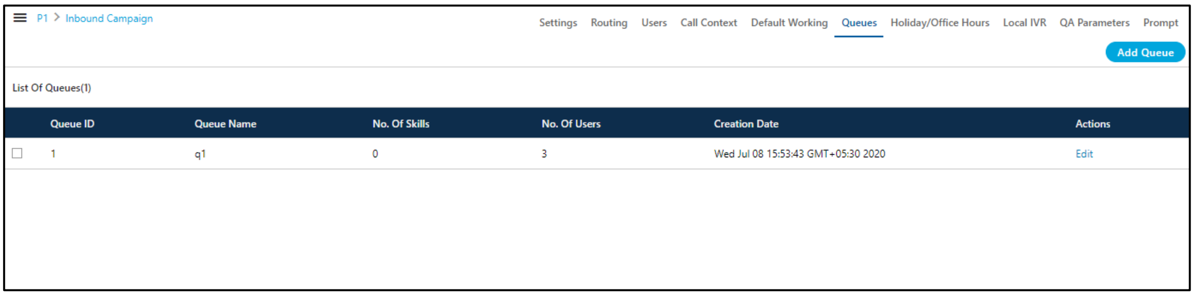


Figure: List of Queues

11.3.3.2 Edit Queue

Click "Edit" icon present in the list of the queues. The same page opens which opens at the time of the queue creation. You can change all the information entered at the time of the queue creation.

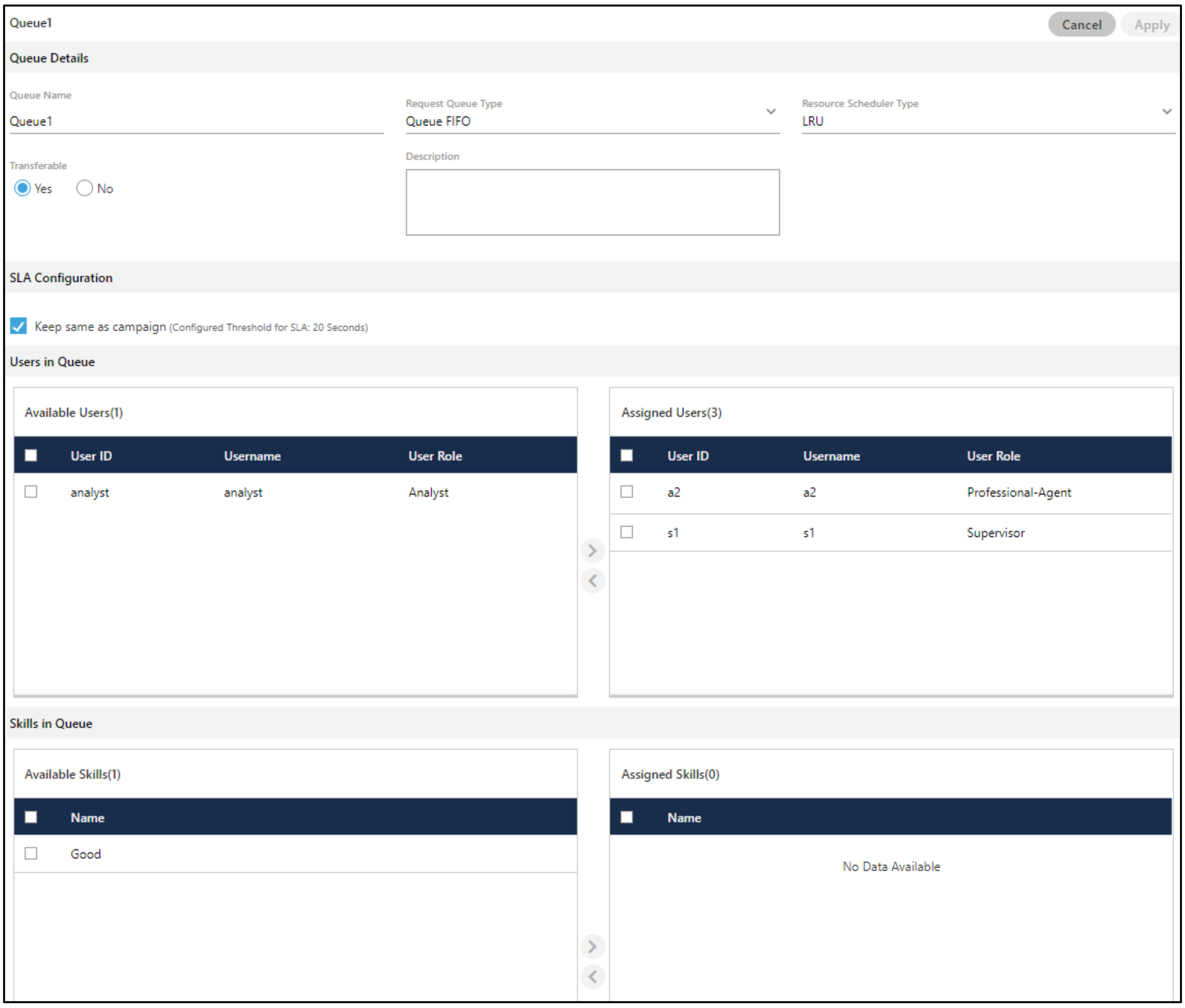


Figure: Edit the Queue

11.3.3.3 Delete Queue

You can delete the queue. Select the queue, which you want to delete and then, click "Delete" button present at the right top corner of the page. A confirmation pop-up comes up.

Figure: Delete Queue

Click "Delete" button to confirm the deletion of the queue, else click "Cancel".

11.3.4 Local IVR in a Campaign (Licensable)

"Local IVR" is a full-fledged IVR (Interactive Voice Response) running locally. The term locally or local refers to the telephony channel on which the IVR is running. Besides the channel there is no difference in a normal IVR running on an incoming channel and a local IVR.

11.3.4.1 Examples

- If you take an example of a customer calling to book a travel ticket or a customer calling to bank, then the customer is welcomed by the main IVR of a Nested IVR. When the customer press any option on the main IVR, a new IVR (that is a branch of main IVR) is presented.
- Sometimes the Agent confer a customer's call with IVR for taking some input directly from the customer to the system. For example, the customer wants to change the PIN of a Debit/Credit Card after connecting the call with the agent.

11.3.4.2 Business Use Case

Agent is connected with customer via inbound call, then agent confer with Local IVR for verification or payment gateway. This is done in conference so that agent can guide the customer what to do on the IVR. However the information entered by the customer is not visible to the agent anywhere.

11.3.4.3 Local IVR Tab in Voice Campaign Settings

"Local IVR" Tab in Interactive Voice Application Campaign Settings lets the Administrator create the Local IVRs.

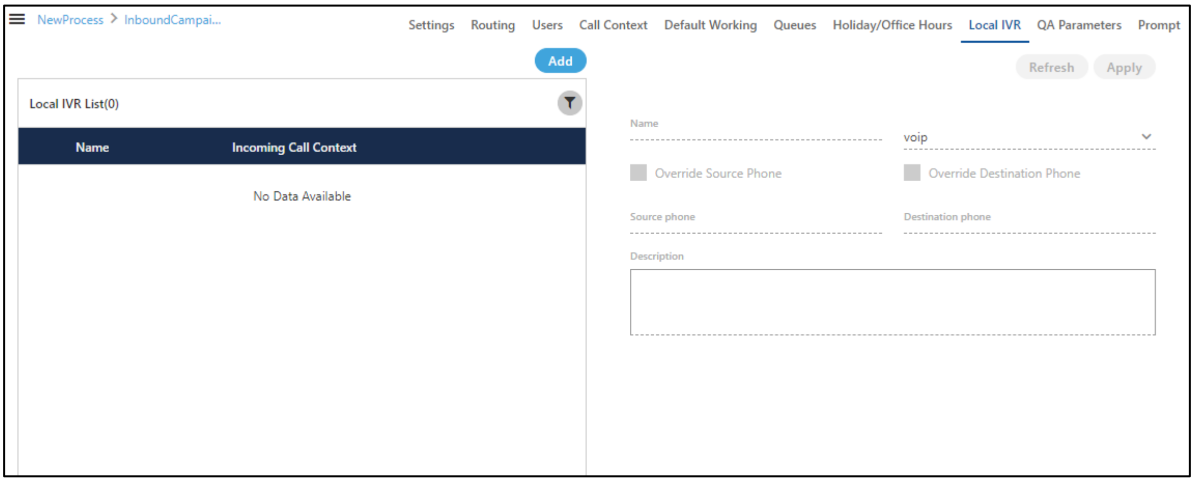


Figure: Local IVR Tab

11.3.4.4 Add a Local IVR

Perform the following steps to add a Local IVR.

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

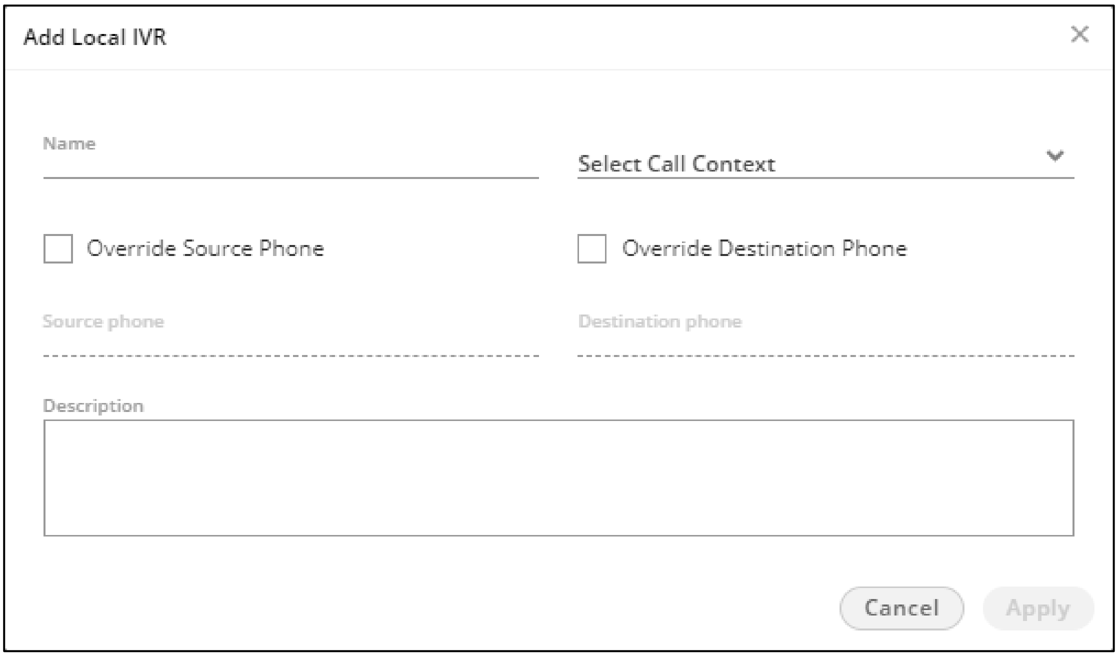


Figure: Add a Local IVR

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.

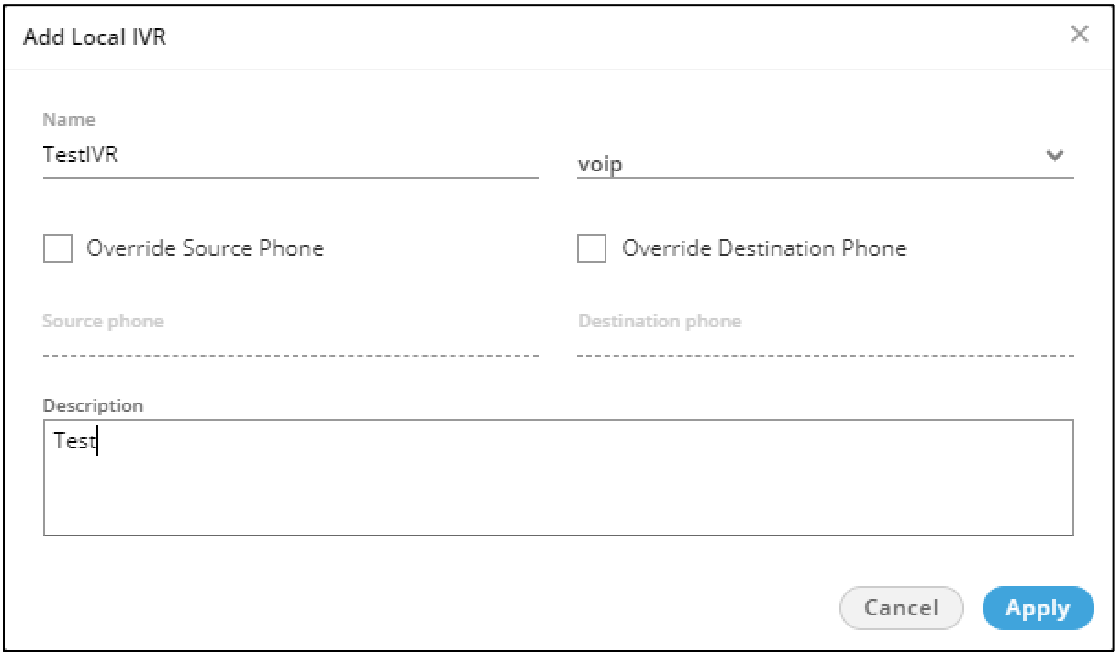


Figure: Sample Details

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.

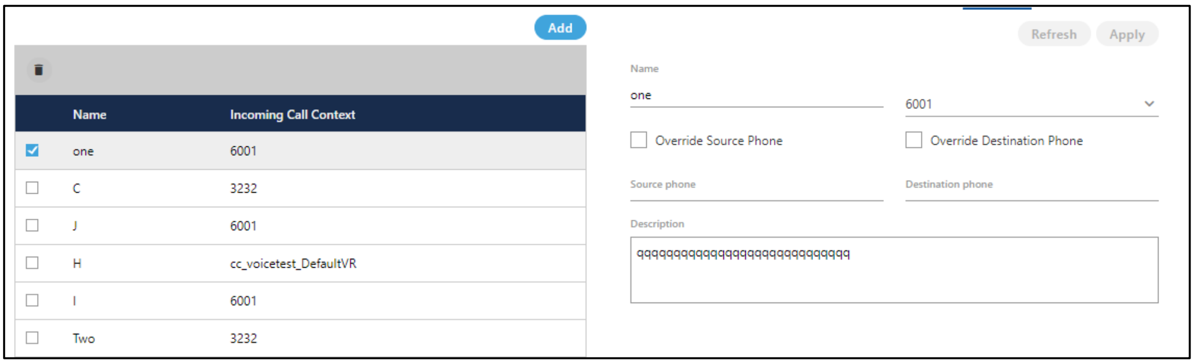


Figure: Local IVRs

11.3.4.5 Defining the Call Context at the System-level or Campaign-level

11.3.4.5.1 Scenario 1: System-level Call Routing for IVR

You have to define the Call Routing at the System-level if any of the following conditions is true.

- System-level (or Contact Center level) Call Context has been selected to add the Local IVR.
- Source Phone is specified to add the Local IVR.
- Destination Phone is specified to add the Local IVR.

Refer to "System Call Routing" page to know about the steps to create a Call Routing Plan.

11.3.4.5.2 Scenario 2: Campaign-level Call Routing for IVR

You have to define the Call Routing in "Call Routing" tab of Campaign Settings only if the above conditions specified for System-level Routing are not true. The Call Context, which is used to add the Local IVR, have to be used to create a Context Feature in "Call Routing" of Campaign Settings. Refer to "Call Routing" page to know the steps to create a Call Routing in the Campaign Settings.

11.3.4.6 How Call Routing works with Local IVR?

Call Routing means that a call is being moved from an endpoint to another. The decisions in the Call Routing can be made using many reasons sucha as Caller Identification, Dialed Number, Time of Day, and Custom Defined Parameters established in an IVR (Interactive Voice Response) program script.

In Ameyo, we use term profiles for different routing sequence. Currently, the following three types of profiles are being used.

- Source-based
- Destination-based
- Call Context-based

11.3.4.7 Important Point

The Ameyo System supports more than one "conferwithIVR" profiles to serve different types of Call Conferences as per the different business requirements.

11.3.4.8 Known Issues related to Local IVR in Ameyo

- Local IVR is not supported for Outbound Campaigns.
- The Agent can only confer the call with Local IVR. The Agent cannot transfer the call to the IVR.

11.3.4.9 Modifying an IVR

Perform the following steps to modify an existing Local IVR in the Campaign Settings.

1. In "Local IVR" tab, select a Local IVR to view its details in the right panel.

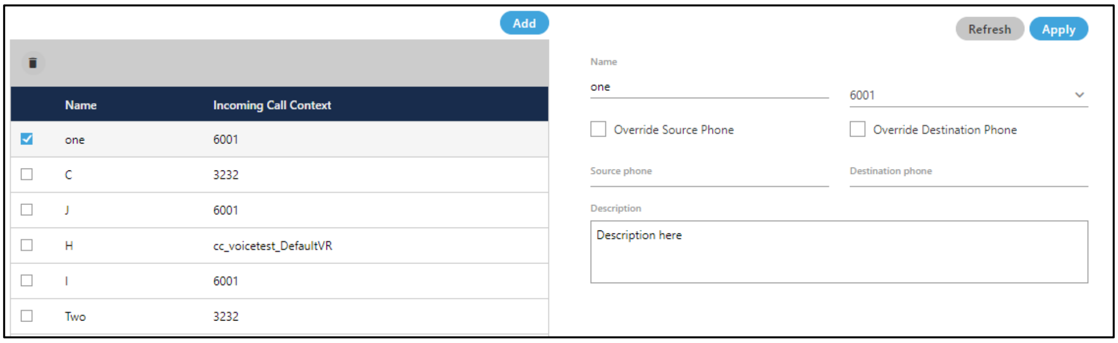


Figure: Sample Details

2. You can change the following fields while modifying a local IVR.
   - Name
   - Call Context
   - Enable or disable the option to override the Source Phone
   - Already provided Source Phone Number
   - Enable or disable the option to override the Destination Phone

- Already provided Destination Phone Number
- Description

- If the System-level Call Routing Plan is created based upon the Call Context, Source Phone Number, or Destination Phone Number, then Call Routing will not work for this IVR if you change any of these fields.
- If the Campaign-level Call Routing Feature is created based upon the Call Context, then the Call Routing will not work for this IVR if you change the Call Context.

3. Validate the changes carefully as the Call Routing can be disabled for this Local IVR if any change is made to Call Context, Source Phone, or Destination Phone.
4. Click "Apply" to apply the changes.

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

11.3.4.10 Delete an existing Local IVR

- The Deleted Local IVR will not be played at the assigned Call Context Feature, Source Phone Number, or Destination Phone Number.
- The Deleted Local IVR cannot be restored using any method.

Sometimes an existing Local IVR becomes obsolete and it has to be replaced with an all new IVR. If you are planning to delete an IVR, then you have to plan properly before going ahead as the deleted IVR will not be played in the Call Flow.

Perform the following steps to delete a Local IVR.

1. In "Local IVR" tab, select a Local IVR to view its details in the right panel.

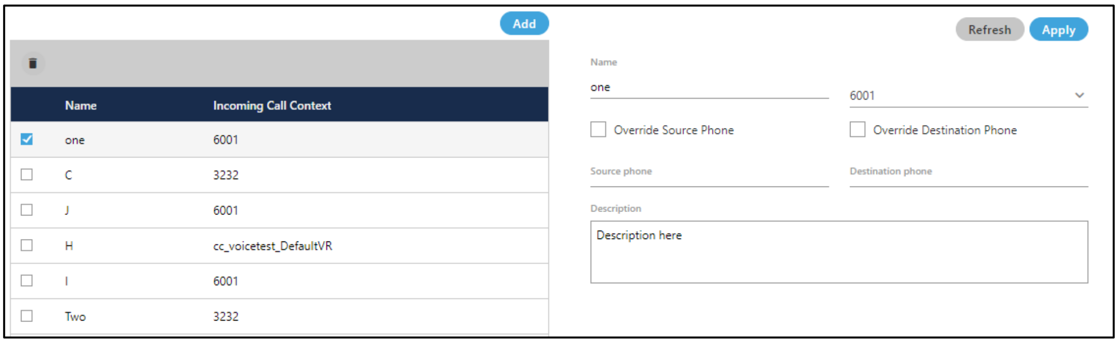


Figure: Sample Details

2. Click "Delete" button in the top right section. It shows the following warning message.

Figure: Warning before deleting an IVR

3. Click "Yes" to delete the local IVR.

   Rather, you can click "No" to not delete the Local IVR.

11.3.4.11 More Information

Refer to the following document to know more about the Local IVR.

Configuration Document: https://sites.google.com/a/ameyo.com/engineering/Home/certificationknowledgebase/local-ivr-testing-in-4-x

11.3.5 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.

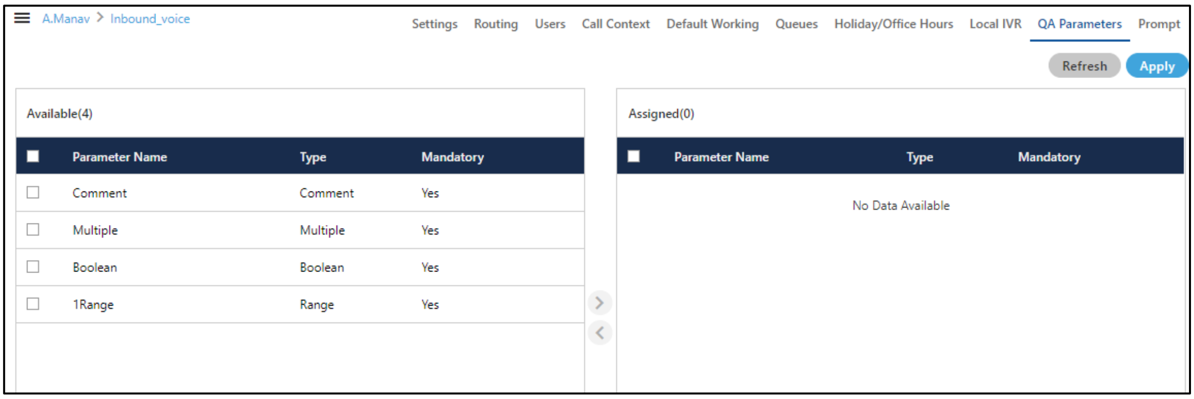


Figure: QA Parameters

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.

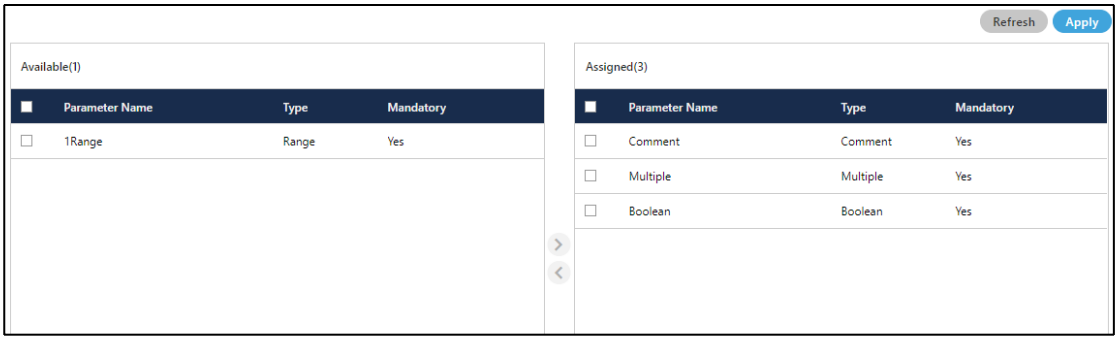


Figure: Assign or Unassign QA Parameters

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.

11.3.6 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 or .mp3 formats.

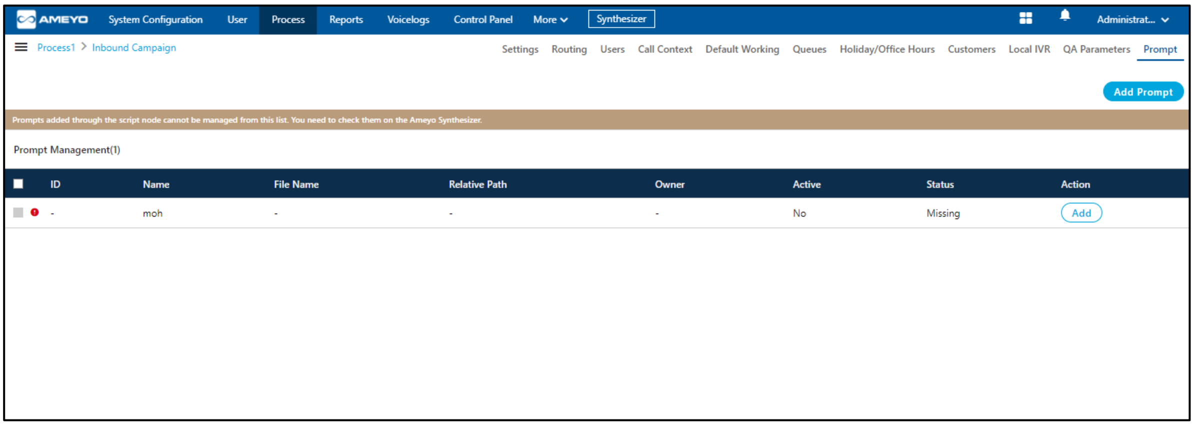


Figure: Prompt Management

11.3.6.1 Add a Prompt

Perform the following steps to create a Prompt.

1. Click "Add Prompt" button in the top right corner. It shows the following pop-up.

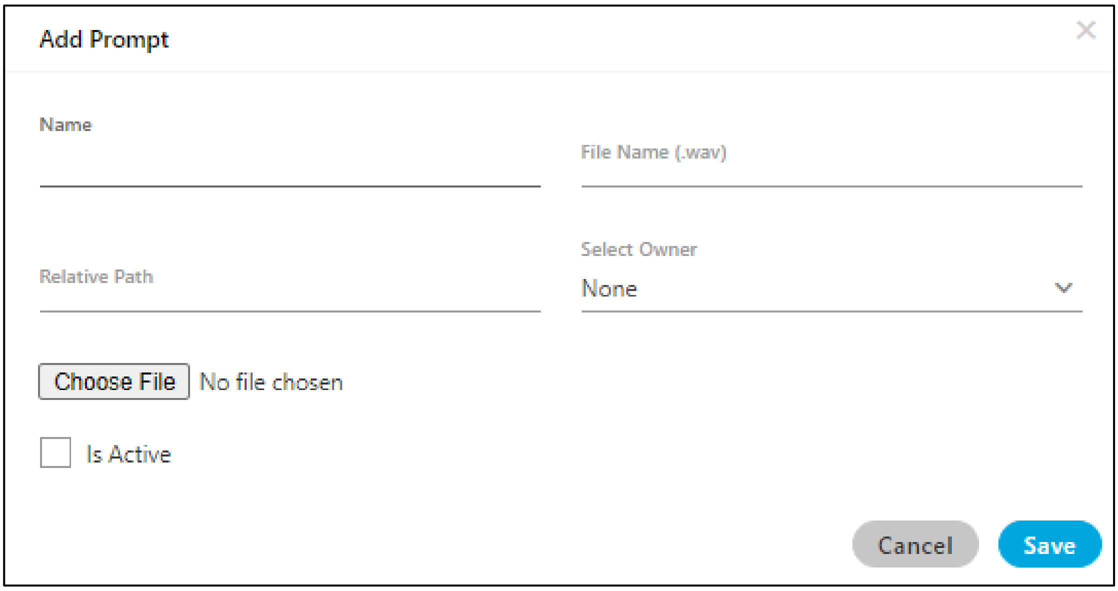


Figure: Add a Prompt

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.

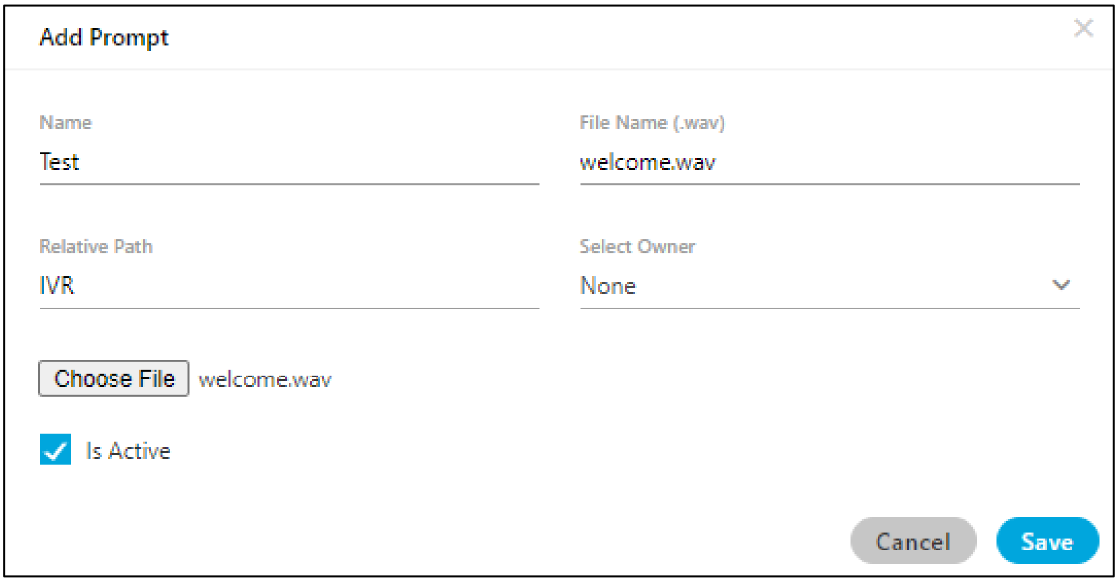


Figure: Adding Prompt with Sample Details

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.

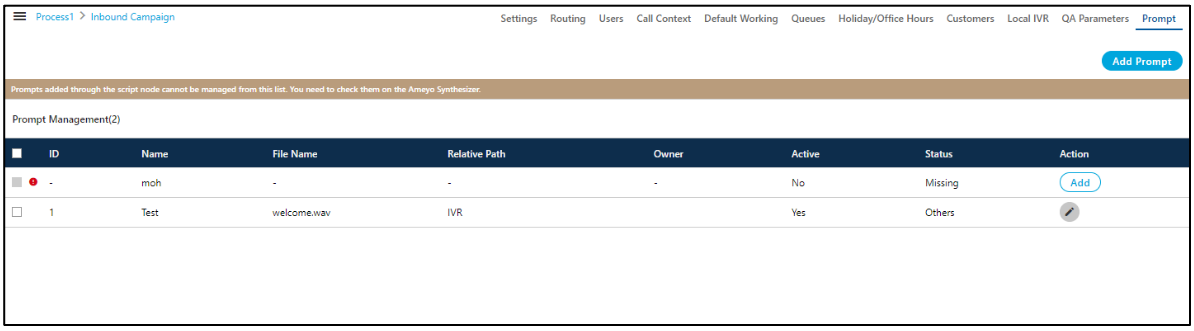


Figure: Added Prompts

11.3.6.2 Compatibility List

The administrator can upload the prompts in MP3 and Wav format. The following are the supported compatibility list that the administrator can use.

- **MP3:**
  - cbr mp3

    - vbr mp3
    - 144kbps mp3
    - 256kbps mp3
- **Wav:**
    - PCM with any sampling rate (Hz) or bitrate (bits per sample * sampling rate)
    - Size: Up to 25 MB only

The call server will play only .wav files with 16-bit sample size, 8000 Hz, and mono-channel. Hence, as soon as you upload the prompt file, it gets converted to a call server compatible format. While adding a prompt, "File Name" field is used to store the prompt with the specified name on the call servers. Hence specify the name with extension .wav. Suppose the Administrator has provided the prompt name as "test", then the system will suffix ".wav" to that prompt name in "File Name" field automatically. If you specify any other extension, then an error message is displayed. This behavior keeps the user experience backward compatible, and the existing users shall not need to learn the usage again.

11.3.6.3 Edit Prompt

Click "Edit" link under "Action" column header for any prompt to edit it. It shows the following pop-up.

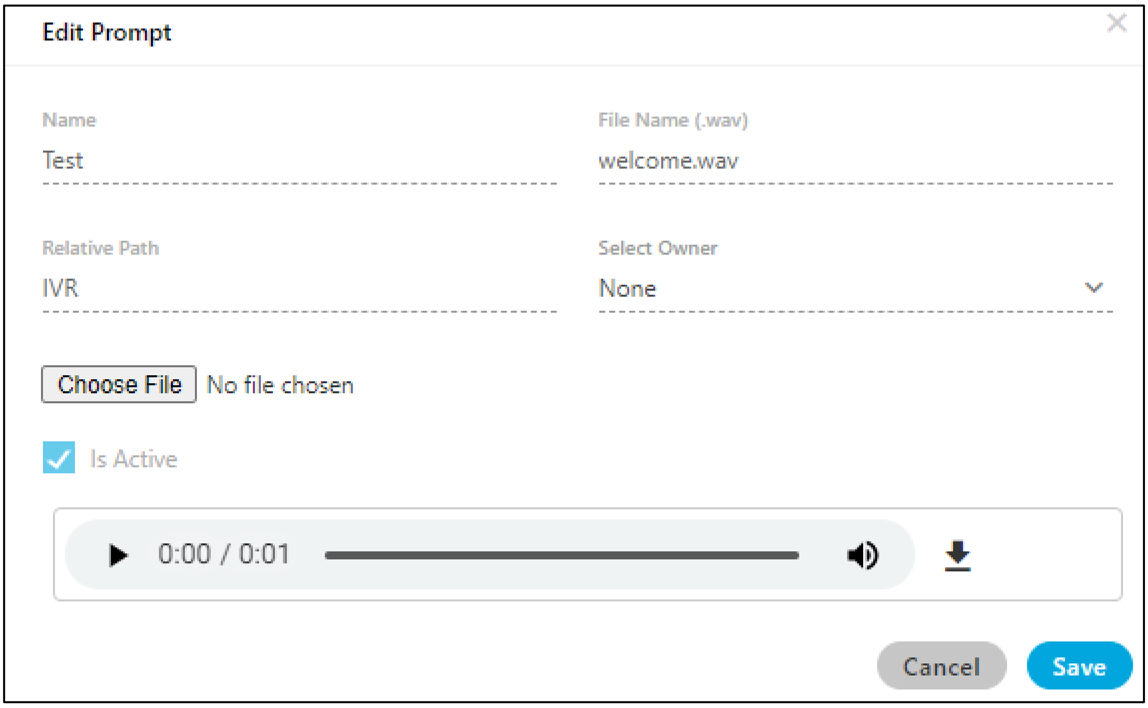


Figure: Edit a Prompt

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.

11.3.7 Identification of Missing Prompts

Whenever a customer calls a business, every voice message that is played is known as prompts. But there are some prompts whose voice message file is not present. Such prompts are called missing prompts. These prompts are shown to the user on UI, but they are not useful as their prompt is not uploaded. Thus to identify such prompts, missing prompt icon and status has been introduced in Ameyo.

On the Prompts tab of Administrator and Supervisor, a new status column has been introduced. This column's values show whether the prompt is in use or missing, as shown in the following screenshot.

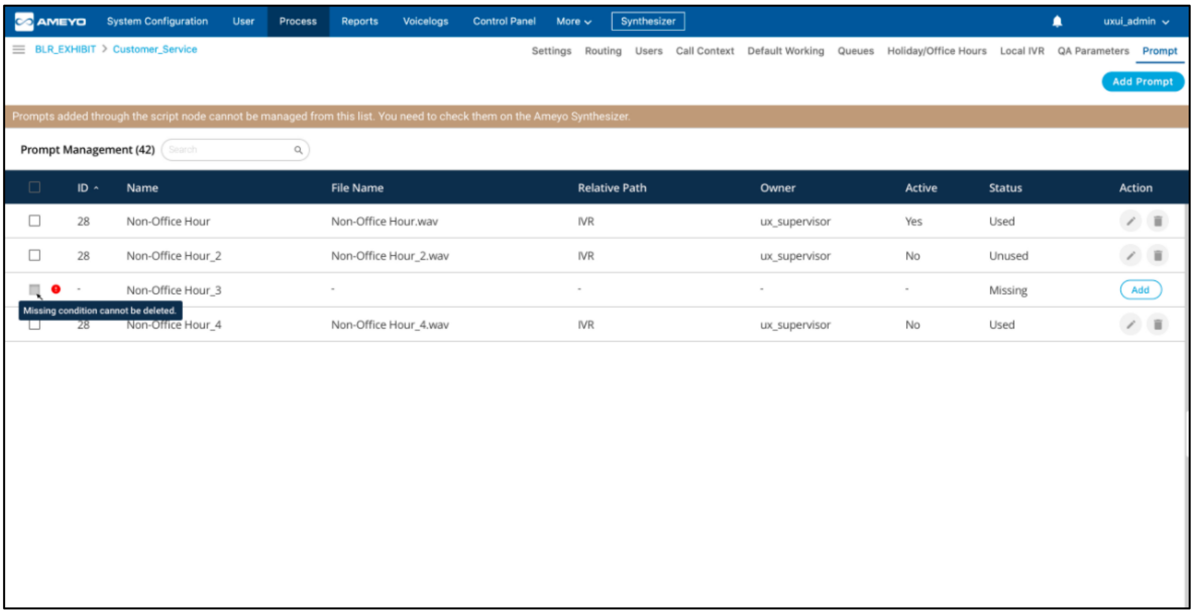


Figure: New Interface of Prompt Tab

A new status column is introduced, which shows the status of the prompt. The following three status have been used to monitor the prompts:

1. **Used:** It means that the prompt is in use.
2. **Unused:** It means that the prompt is not in use.
3. **Missing:** It means that the prompt voice file is missing, but the prompt is being created.

A visual red dot indentation is present at the front of the missing prompts. The user can also hover over this icon to view the information about the missing prompts.

11.3.7.1 Non-editable Prompt Name

A modal is shown when the user click "ADD" button present in front of the missing prompt. The name textfield of this modal is non-editable, which means that the user is not able to edit the name of the prompt.

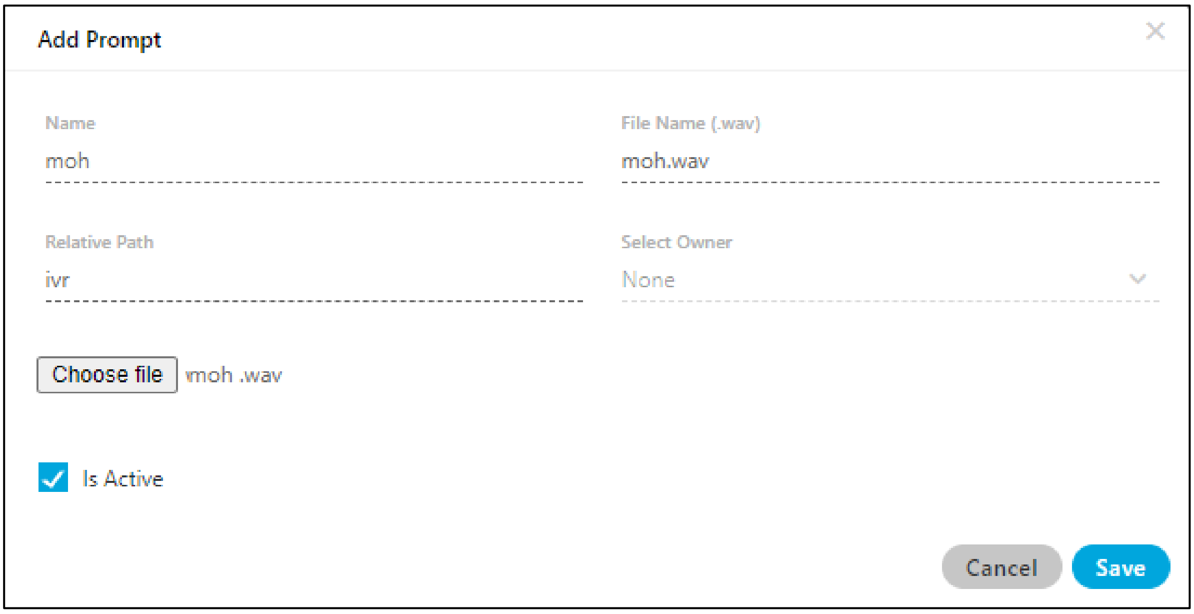


Figure: Non-editable textfield of Prompt Name

11.3.7.2 Notification for Uploading a Prompt file

If the supervisor uploads the nodeflows to the missing prompt files, then a notification will be sent to the administrator and supervisor at the same time. The following types of notifications will be sent to the administrator and supervisor for uploading the nodeflow file.

1. A toast and bell notification is sent to the administrator.
2. The supervisor has received a bell notification.

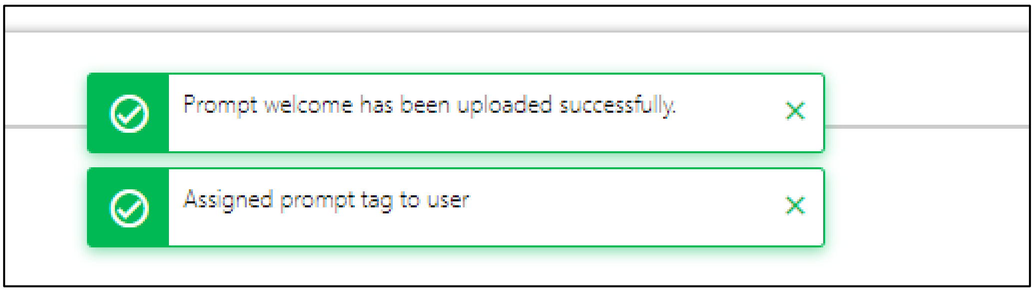


Figure: Toast notification at Administrator UI

The notification shows the campaign and prompt name in which the nodeflow has been uploaded. The administrator will be redirected to the prompts tab after clicking the notification.

After the creation of the missing prompt, the missing prompt's status will be changed to used/unused accordingly.

The notification will only be sent to the Group Manager and Analyst user roles. They are not able to update or click it.

Missing Prompts are as such not an entity, thus there is no option to delete them.

11.3.8 Routing in a Voice Campaign

11.3.8.1 Routing in a Voice Campaign

Here, you can create and manage the routing for both Inbound and Outbound Calls in Interactive Voice Application Campaign, Outbound Campaign, and Parallel Predictive Campaign.

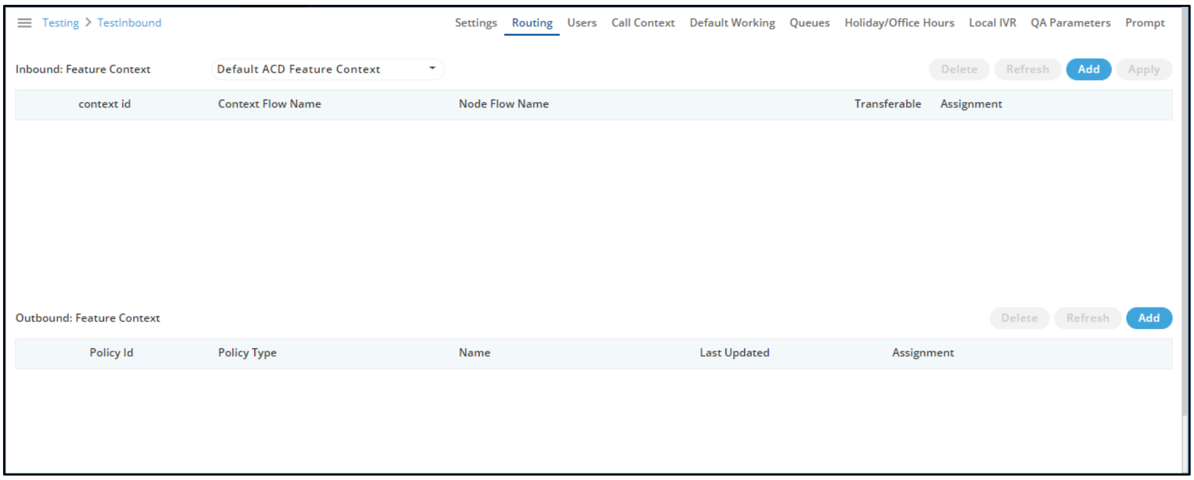


Figure: Routing

11.3.8.1.1 [Routing for Inbound]

11.3.8.1.1.1 Add a Nodeflow for Routing

Perform the following steps to create a nodeflow.

1. Click "Add" button to create a nodeflow. 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.

11.3.8.1.1.2 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.

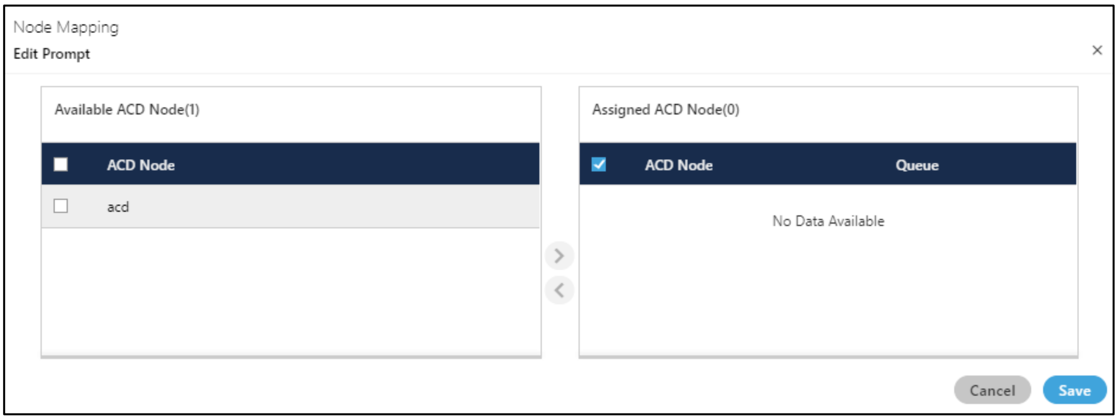


Figure: Assign Nodeflow to a Queue

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.

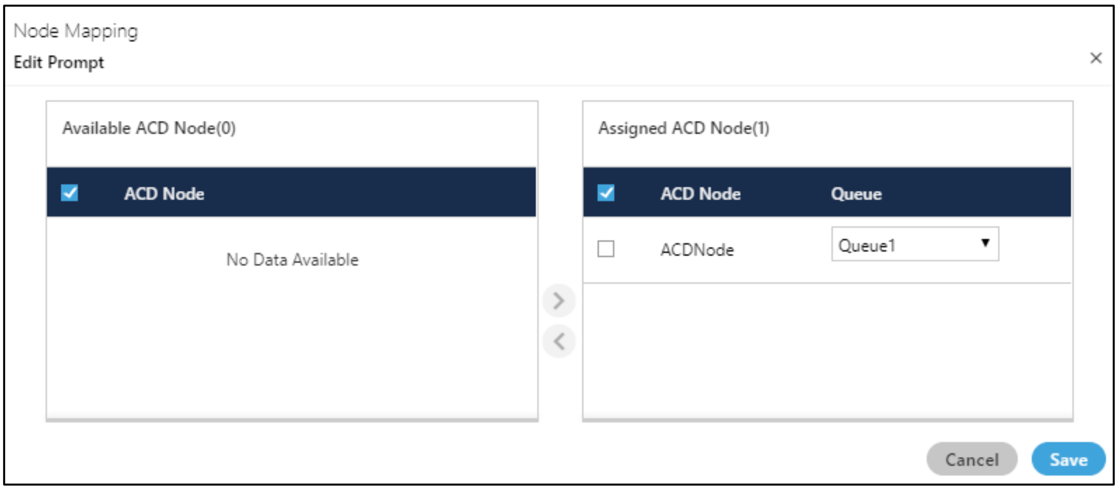


Figure: Assign Queue in ACDNode

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.

11.3.8.1.2 Delete Routing Policy

Select the Routing Policy for which you want to delete permanently. Click "Delete" button. A confirmation pop-up comes up.

Figure: Delete Routing Policies

Click "Yes" if you want to delete the routing policy, else click "No".

11.3.8.1.3 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.

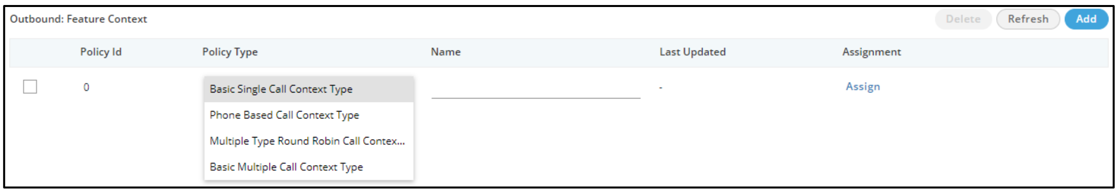


Figure: Adding an Outbound Routing Policy

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.

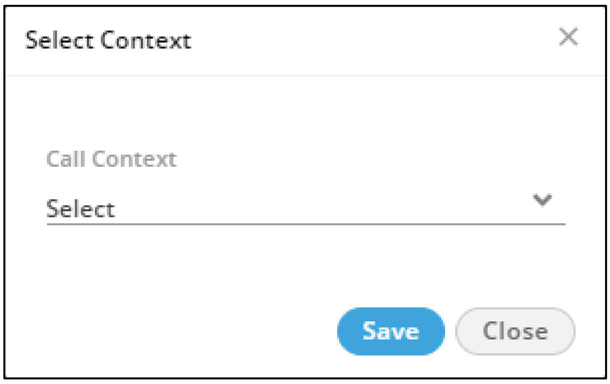


Figure: Select Call Context for Basic Policy

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.

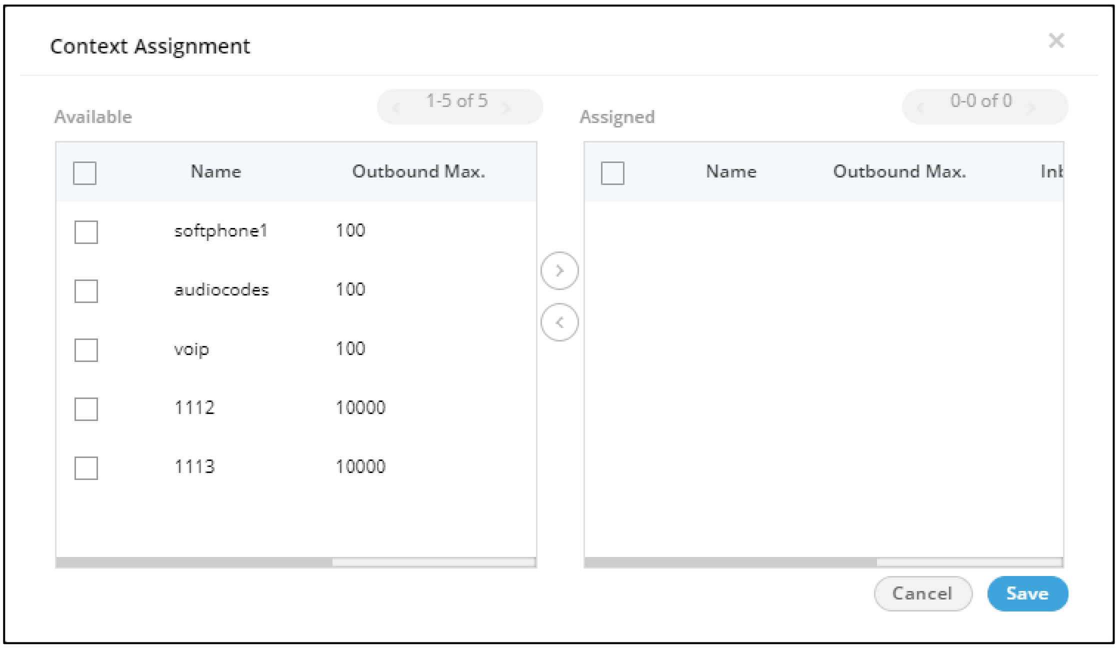


Figure: Select Call Contexts for Multiple Type Policy

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.

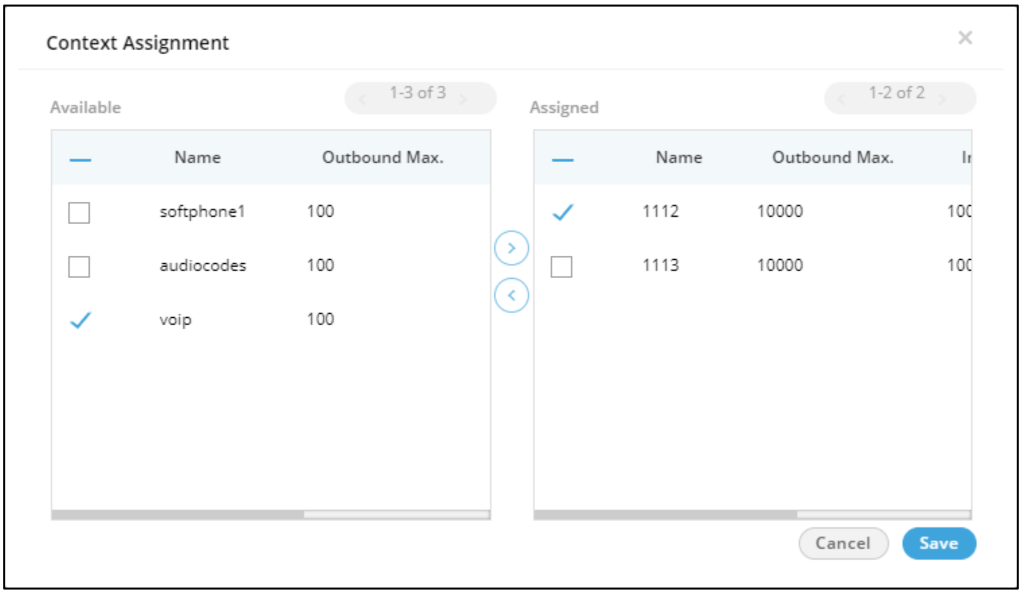


Figure: Assign or Unassign Call Contexts

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.

11.3.8.1.4 Delete Routing Policy

Select the Routing Policy for which you want to delete permanently. Click "Delete" button. A confirmation pop-up comes up.

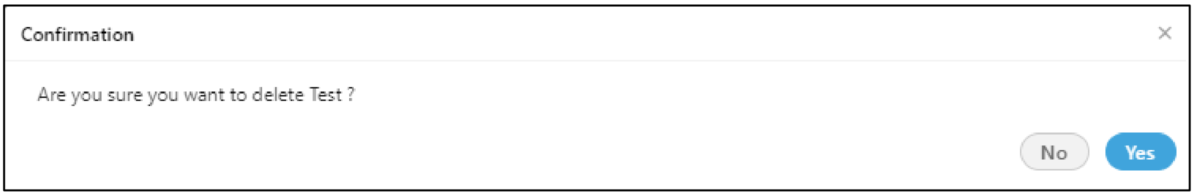


Figure: Delete Routing Policies

Click "Yes" if you want to delete the routing policy, else click "No".

11.3.8.2 Types of Routing in a Voice Campaign

11.3.8.2.1 Types of Routing in Voice Campaign

The following are the routing types in a Voice Campaign.

1. Skill-based Routing
2. Queue-based Routing
3. Priority-based Routing

11.3.8.2.1.1 Skill-based Call Routing in a Voice Campaign

A skill-based routing in a voice campaign is based upon the skills of the agent assigned in that queue. It means that the calls will be first offered to the agents who have more skills as compared to others.

Business Use Case 1

Suppose a scenario in which there are two types of agents: some agents are experts in the Spanish language, whereas others are experts in the English language. Based upon their skill levels (ranges from 1-10), the administrator has provided the skill level to both types of agents. Now, a customer initiated a voice call and selected English as its preferred language for the conversation. The call for that customer will be handed over to the agent who has a higher skill level in the English language. The agents with a low skill level in English will get the call only if the agents of higher skill levels are busy.

Similarly, if a customer initiated a voice call with preferred language Spanish, then the agent with high Spanish skill will get the call first.

Business Use Case 2

There can be one more case in addition to the above scenario. Suppose one agent is assigned with both skills; that is, English and Spanish, but the skill level of Spanish is higher than English. In that case, the agent will get the Spanish calls first until either all Spanish calls have been answered (that is, there is no pending Spanish call left), or the SLA for the English calls does not breach.

Click here to know the steps to configure the Skill-based Call Routing.

11.3.8.2.1.2 Queue-based Routing for Voice Calls

A Queue-based routing in a voice campaign is based upon the priority given to the queues. It means whenever a call arrives; the system offers it to that queue, which has more priority over others.

Business Use Case

Suppose a scenario in which there are two queues: the first queue contains agents with more knowledge or experience, and the second queue has agents with less knowledge or experience. In this case, the priority for the first queue is more than the priority of the second queue. It means that whenever a call arrives in the system, the system tries to connect it with the agents assigned in the first queue. Only if the agents of the first queue are busy or not available, then the calls will be given to the agents available in the second queue.

11.3.8.2.1.3 Priority-based Routing for Voice Calls

A Priority-based routing in a voice call campaign is based upon the priority given to the calls initiated by the customers. It means that the calls which are more important for the business gets priority and answered first than to the calls with less priority.

Simple Business Use Case

Suppose a use case where the organization gets two types of calls: the first type of calls are sales driven that originates revenue to the company, and the second type of calls are of support. The priority for the sales calls is more than the priority of the support calls. Suppose a customer initiated a voice call of sales type, and at the same time, another call for support is also initiated by another customer. In this case, the sales call will be given priority over the support call. It means that the agent gets the sales call first, and after that, the support call will be offered to the agent.

Complex Business Use Case

Suppose a scenario where the business has two languages to serve the customers; for example, English and Hindi languages. All agents are either knowing both languages already or supposed to deal in both languages. In this case, there are three different business calls, which are sales, renewal, and care calls. The priority of these calls is that Sales calls have Priority 1, renewal has Priority 2, and care has Priority 3. For this scenario, the following solution can be possible.

Solution: Assign the skill levels of English and Hindi to all agents. Create queues for all the business calls as per the languages.

- sales_for_english

- sales_for_hindi
- renewal_for_english
- renewal_for_hindi
- care_for_english
- care_for_hindi

Assign the priority of the business calls in the selected nodeflow; that is, sales calls have Priority 1, renewal calls have Priority 2, and care calls have Priority 3.

Either all agents can be assigned in all of these queues, or the agents can be distributed in these queues as per requirement. Now, when a customer calls, then based upon the business type, the call will be distributed between the different queues and agents. The call with a high priority will be given more preference over the calls with less priority.

As per this solution, the calls with less priority have to wait for more than expected, and chances of call drop can be raised. To prevent this problem, we have to concentrate more on low priority calls also. Now, assign the SLA to all three types of calls, so that less priority call will be answered before its SLA is going to breach. For this, create a new queue named "OverFlow_Queue". Now, whenever a call of the low priority level is going to breach the SLA, it will be sent to the newly created "OverFlow_Queue", and thus all calls will be answered in this way.

11.3.8.2.2 Skill-based Call Routing in a Voice Campaign

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.

Perform the following steps to route your call according to skills defined.

1. Add the skill category, skill levels, and assign skills to the agents. [Know more...]

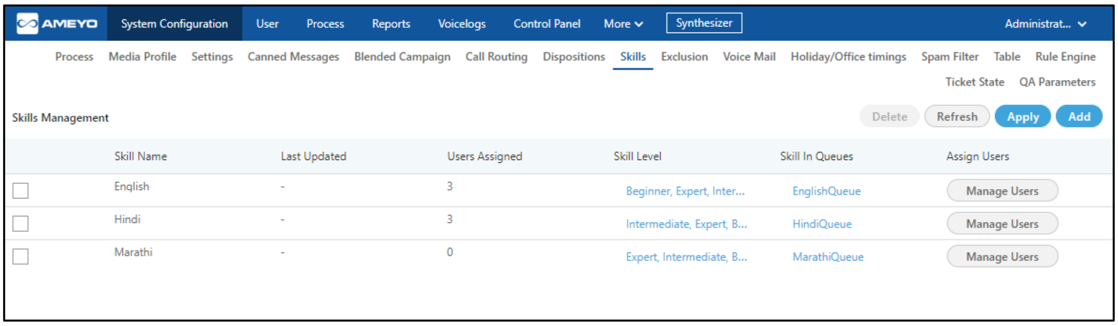


Figure: Added Skills

2. In "Process" Tab, select "Inbound Campaign" and go to "Queues" Tab. Create the queues as per the defined skills. [Know more...]

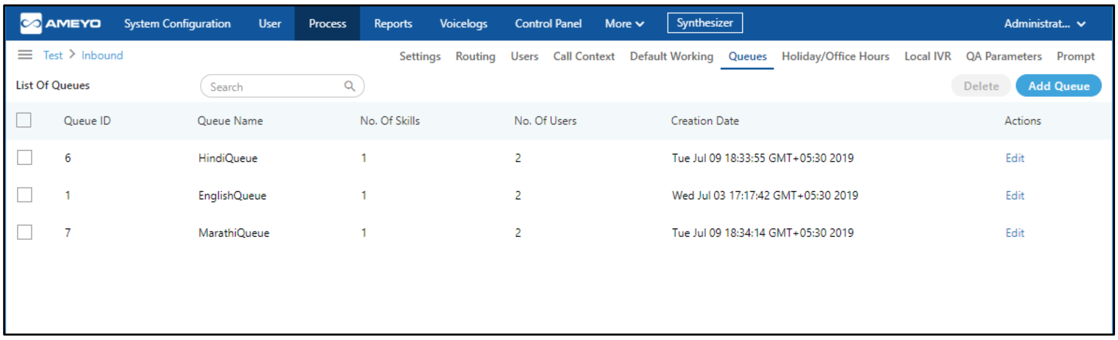


Figure: Assign Queues

3. Now, assign the skills in the queue. [Know more...]

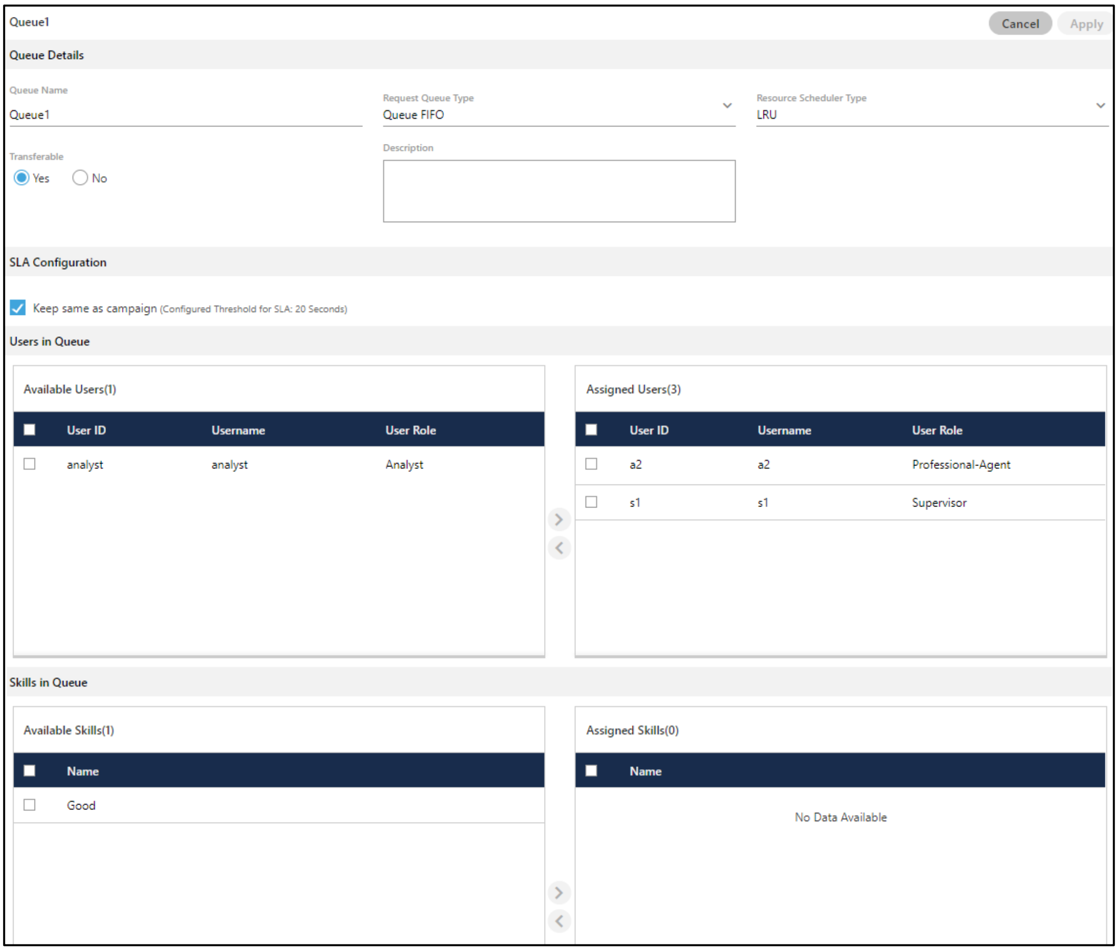


Figure: Assign Skills to Queue

4. Create the routing for the skills which you have created. Assign the ACD Node and the queues corresponding to the skills. Know more...

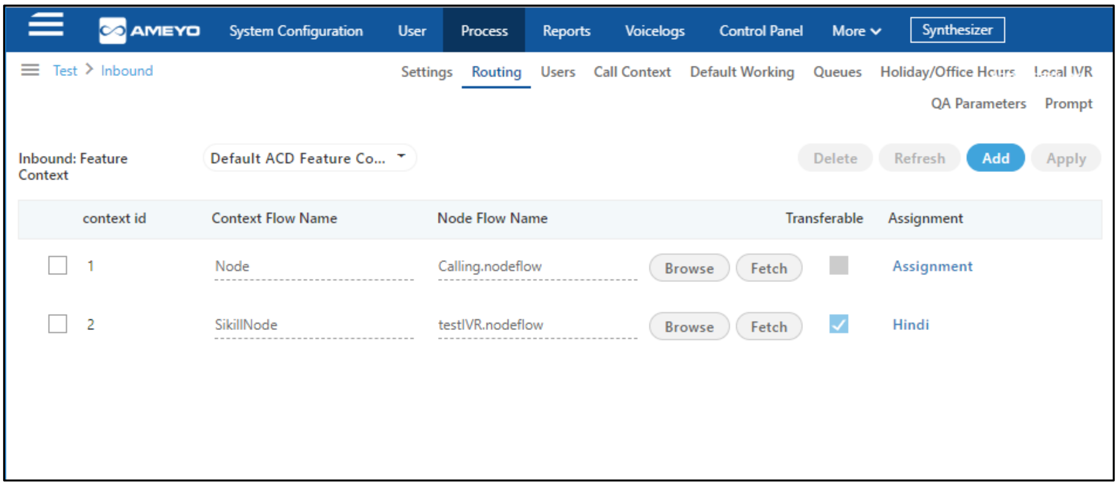


Figure: Assign Routing

Do not delete the old routing nodeflows created earlier rather add the new nodeflows.

5. Again switch the tab to the skills in System configuration menu and click "Skill in Queues" column.

6. Assign the queue to the corresponding skill levels.

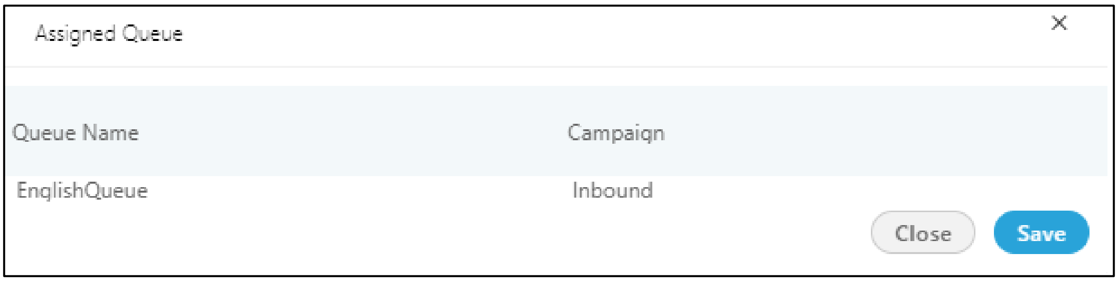


Figure: Assign the Queue

7. Now, go to the inbound campaign and switch the tab to the "Prompt". Here, you have to add the prompt from which the customer has to select the skill level, so that the calls gets to route according to the defined skills. Know more...

   Example:

   In this test case, we are using three skills for routing, that is, English, Hindi, and Marathi. In the Voice Prompt, the English queue is assigned to number 1, Hindi queue is assigned to number 2, and Marathi queue is assigned to number 3.

   Now, if the customer presses 1, then the call will be routed to the English queue, if customer presses 2 then the call will be routed to Hindi queue, and if the customer presses number 3 then the call will be routed to Marathi queue.

The agents with the higher skills will receive the call first and then the agents with lower skills get the calls only if the higher skilled agents are not free to take the call.

11.3.9 Backend Configurations for Voice

There are several configurations through which the User (who has administrative privileges over the Server OS running Ameyo Application server) is able to optimize the Ameyo and increase it's usage according to the organizational need for the voice only setup.

All of these queries will be executed for the product database. Execute the following command to login to the database.

psql -U postgres <Ameyo_Database_Name>

The database name in the above command is the name of the database which is configured to run the appserver. For example, ameyodb is the product database in our test case.

11.3.9.1 Enable Voicelog Recordings for Voice

In Ameyo, all the call that have been made by the agents are recorded. These recorded files are known as Voicelogs. The administrator can play or download these voicelogs to listen the conversation between the agent and customer. Click here to know more about the configuration of Voicelogs in Ameyo.

11.3.9.2 Disable Dialing of Alphabet Strings

Execute the following query to disable the dialing of alphabet string through dialing screen of the agent.

INSERT INTO server_preference_store (context_type ,context_id,key,value) VALUES ('contactCenter','<contact_center_id>','shouldAllowAlphabetsInPhone','true');

11.3.9.3 Resolve Customers using last 10 digits of Phone Number

There are multiple cases when the customers' phone numbers are received in different formats, such as with country code, without country code, with zero (0), or without zero (0). Even if a customer's number contains more than 10 digits and the first 2 or 3 digits represent the country code, still the method to resolve the customer for WhatsApp Chat was considering only the first 10 digits. This was making the customer's phone number unresolvable.

In such a case, a backend configuration, named "phoneDigitsToBeConsideredFromEnd" can be done, which allows the system to consider only the last 10 digits of the customer's phone number. It means that the system will read the phone number starting from the end to the previous 10 digits.

For Example: Suppose the phone number of the customer IS "9876789812". Now, the customer's phone number appears like "+919876789812", "09876789812", and "9876789812". Thus, the system can assume this phone number as three-different phone numbers. But with this configuration, only the last 10 digits will be calculated, which is the "9876789812".

Execute the following query:

INSERT INTO system_configuration_parameter(name,type,value,default_value) VALUES ('phoneDigitsToBeConsideredFromEnd','String',10','10');

11.4 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.

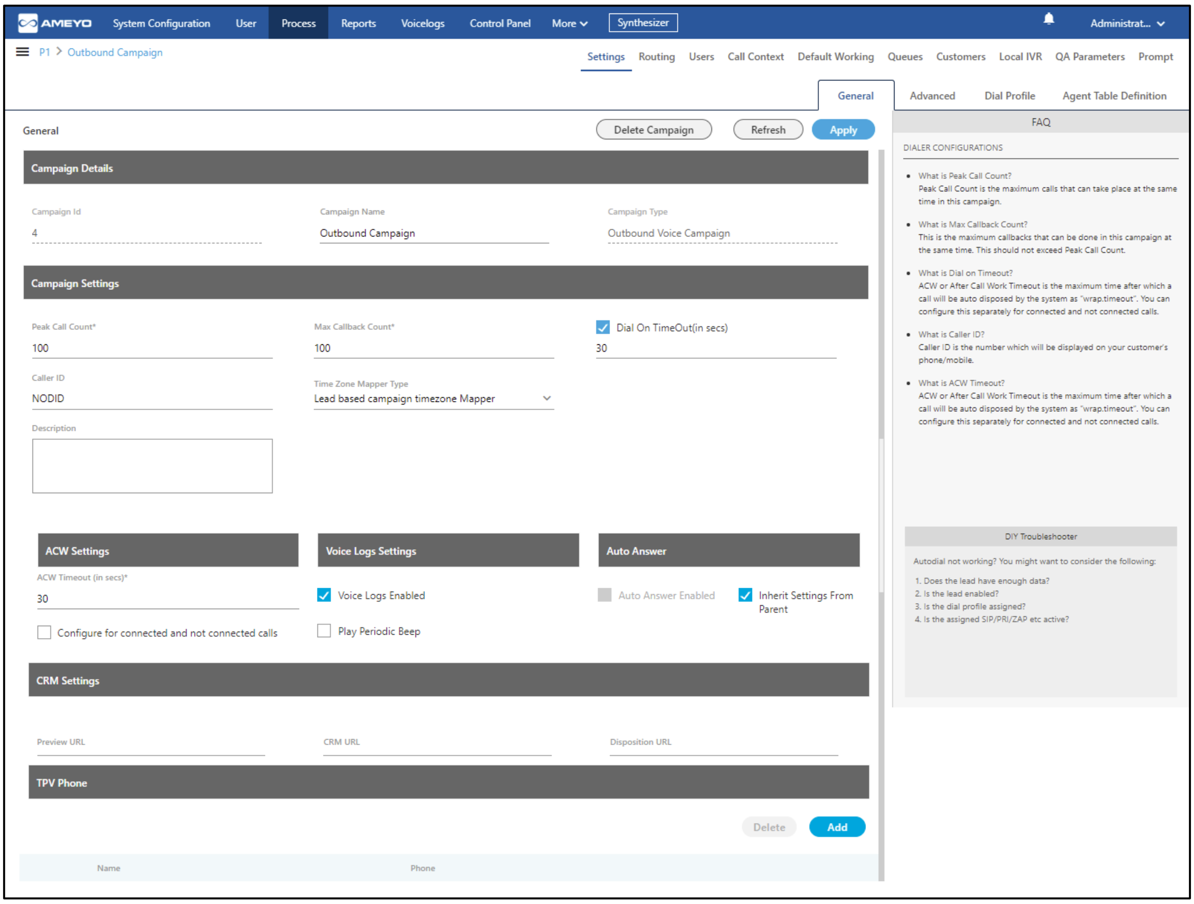


Figure: Settings of Outbound Voice Application Campaign

At the right side of the campaign settings page, some of the commonly asked definitions of settings are defined. You can refer to those definitions.

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

11.4.1.1 Settings Tab

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

11.4.1.1.1 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:** 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.
- **Auto Answer Settings:** Auto-Answer Feature is already available for WebRTC with or without Ameyo SIP Agent Proxy. This feature did not require the implementation of "Accept-Reject" node in the Nodeflow to show the prompt at Ameyo User Console before answering the call.

  However, "Accept-Reject Node" was providing the Auto-Answer Configuration at the campaign-level and this feature was missing in Auto-Answer Feature for WebRTC.

  "Auto-Answer" section contains the following options and only one option will work at a time.

  1. **Inherit from Parent**: Select this option to inherit the Auto-Answer Configuration in the campaign from the System-level. If the Auto-Answer is disabled at the System-level, then it will remain disabled at the Campaign-level. If the Auto-Answer is enabled at the System-level, then it will remain enabled at the Campaign-level.
  2. **Auto Answer Enabled**: It will enable "Auto-Answer" at the Campaign-level forcefully even if it is disabled at the system-level. Refer to the following screenshot.

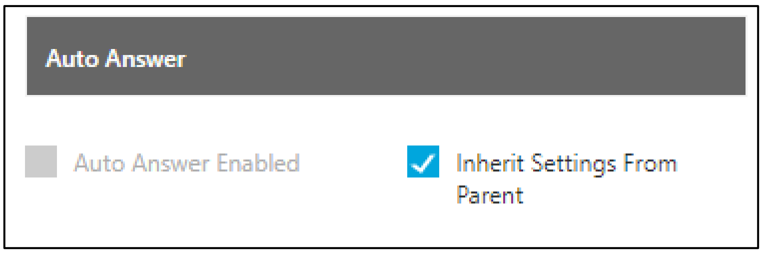


Figure: Auto-Answer Enabled

-
- **(Licensable)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.

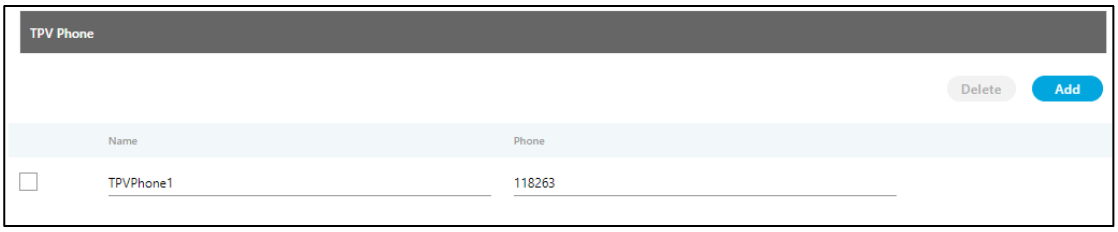


Figure: TPV Phone

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".

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.

11.4.1.1.2 Advanced Settings

Here, the Administrator can configure the Advanced Settings of an Outbound Voice Campaign.

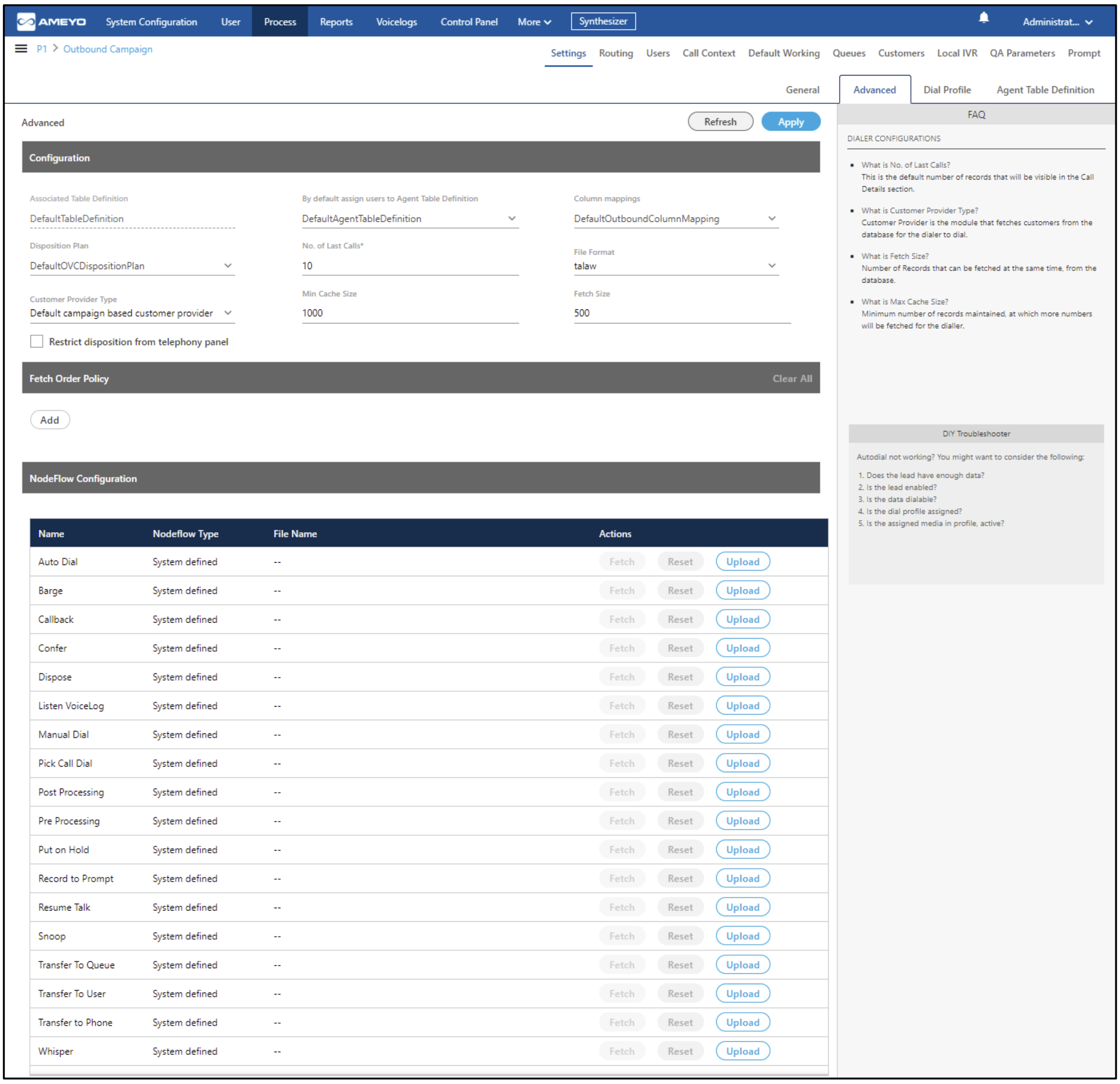


Figure: Advanced Settings

This tab can be divided into these sections - "Configuration", "Fetch Order Policy", and "NodeFlow Configuration".

11.4.1.1.2.1 Configuration

Except for 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 (Licensable): 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 Predictive Parallel Campaign.

      This campaign feature setting is licensable. Contact Ameyo support team for further information on same.

    - Lead Based Customer Provider (Licensable): 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.
    - This campaign feature setting is licensable. Contact Ameyo support team for further information on same.
        - Lead Based Customer Provider is the recommended for Parallel Predictive 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 the 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.

Restrict Disposition from Telephony Panel

In the Contact Center Industry, the business prefers to dispose of the Calls from the CRM, especially which is linked with Ameyo Application Server. The agents have two different ways to dispose of the single call - one through Telephony Panel and another through CRM. If the agent was disposing of the calls in both of the ways, then there will be two dispositions for a single call that can create confusion and discrepancy.

To avoid this discrepancy, a configuration named "Restrict disposition from Telephony Panel" is added in "Advanced" Tab of Voice Campaign Settings. Know more...

11.4.1.1.2.2 Fetch Order Policy (Licensable)

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 campaign. After selecting it, you can select ascending or descending order of the sorting the numbers.

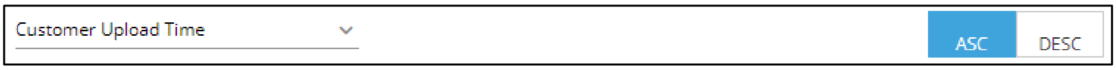


Figure: "Customer Upload Time" Fetch Order Policy

  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.

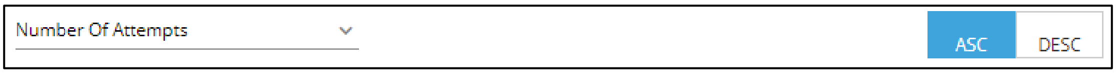


Figure: "Number of Attempts" Fetch Order Policy

- **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.

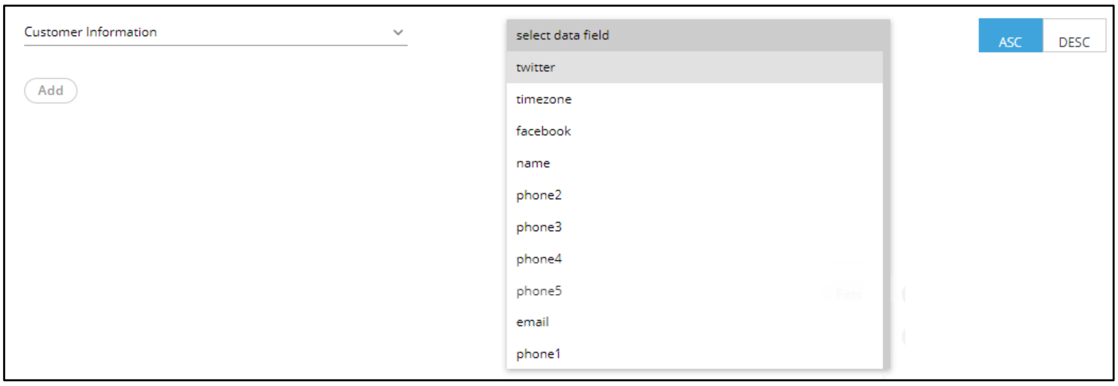


Figure: "Customer Information" Fetch Order Policy

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.

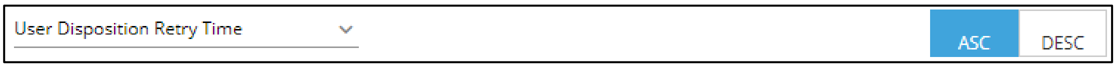


Figure: "User Disposition Retry Time" Fetch Order Policy

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.

11.4.1.1.2.3 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

11.4.1.1.3 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.

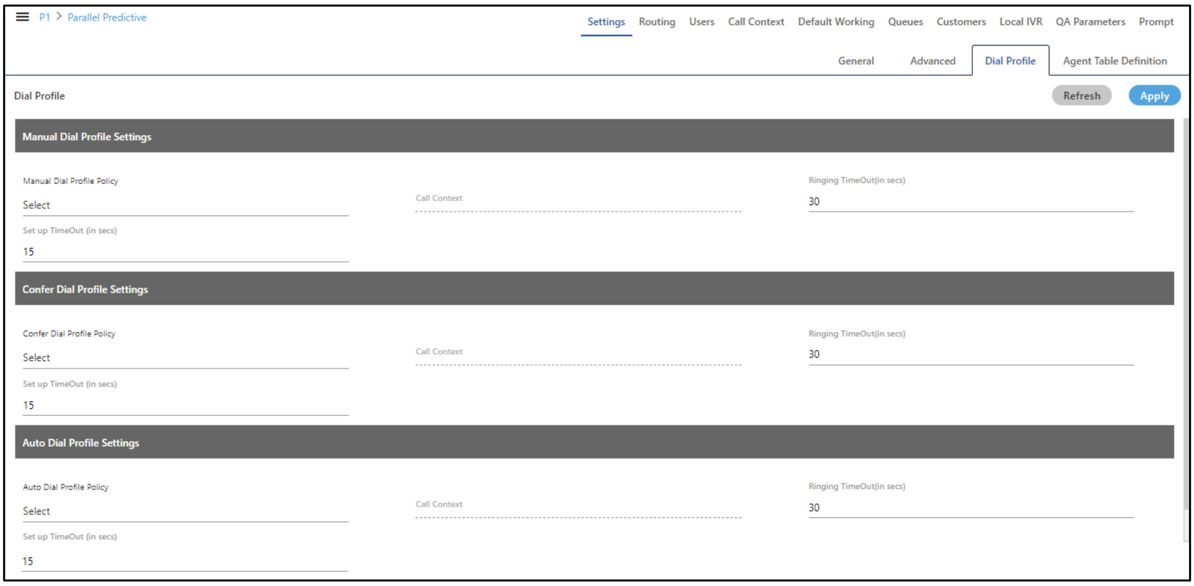


Figure: Dial Profile Settings

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. **<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

3. **<u>Auto Dial Profile Settings</u>:** 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 the "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 the "Call Context" column.

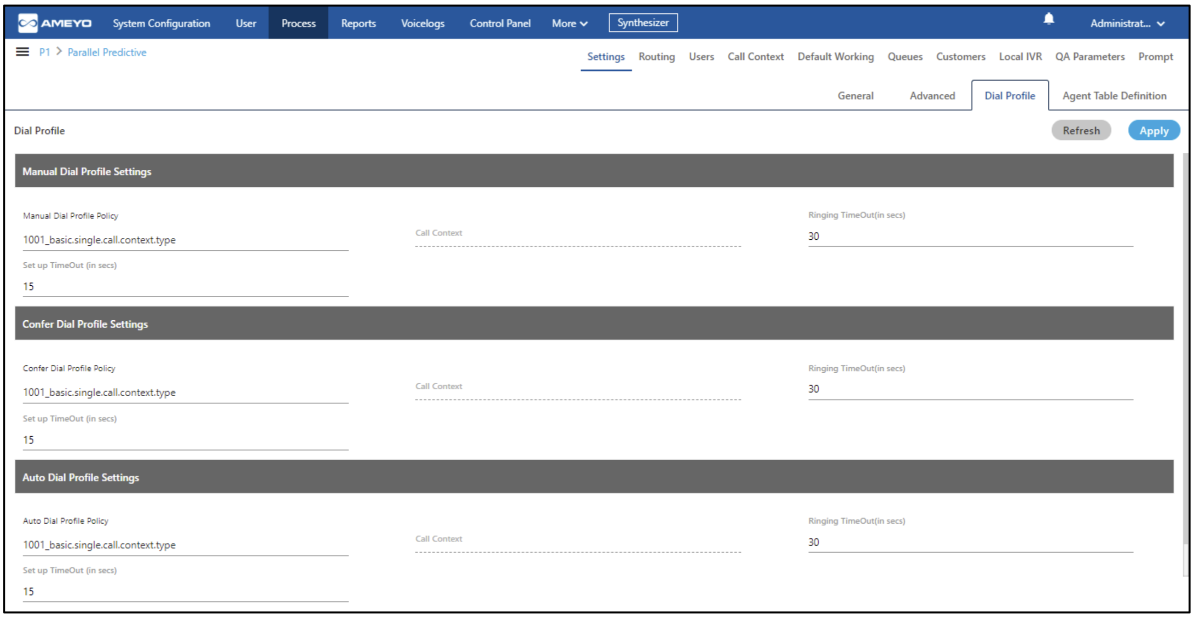


Figure: Configured Dial Profile Settings

11.4.1.2 Agent Table Definition

This tab allows you to select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition. Know more...

11.4.1.3 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...

11.4.1.4 Queues

Here, you can create and manage the queues. This tab has already been explained in the Inbound Campaign Settings. Know more...

11.4.1.5 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...

11.4.1.6 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...

11.4.1.7 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...

11.4.1.8 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

11.4.1.9 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...

11.4.1.10 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...

11.4.1.11 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...

11.4.1.12 Other Settings

Other Settings are explained in the following subsequent pages. Click the links to know more about them.

- **Customers Tab**

11.4.2 Customers Tab in Campaign Settings

11.4.2.1 Customers Tab

You can either use "Filter" or "Filter Groups" to filter the Customers while dialing in the campaign. If you activate "Filter Group", you cannot use "Filters".

Here, you can apply the Filter or Filter Groups on the Inbound, Outbound or Parallel Predictive Dialing Campaign.

You can either apply Table Filter or Table Filter Groups in a Contact Center.

It contains the following tabs. Click the links to know more about them.

1. Filter Tab
2. Filter Group Tab

11.4.2.2 Filter Tab of Customers Tab

You can either use "Filter" or "Filter Groups" to filter the Customers while dialing in the campaign. If you activate "Filter Group", you cannot use "Filters".

It 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...

Hover the mouse over icon to view the information for the selected table filter.

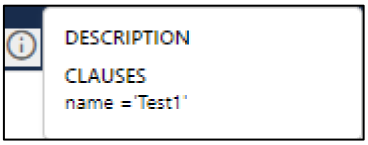


Figure: Filter Details

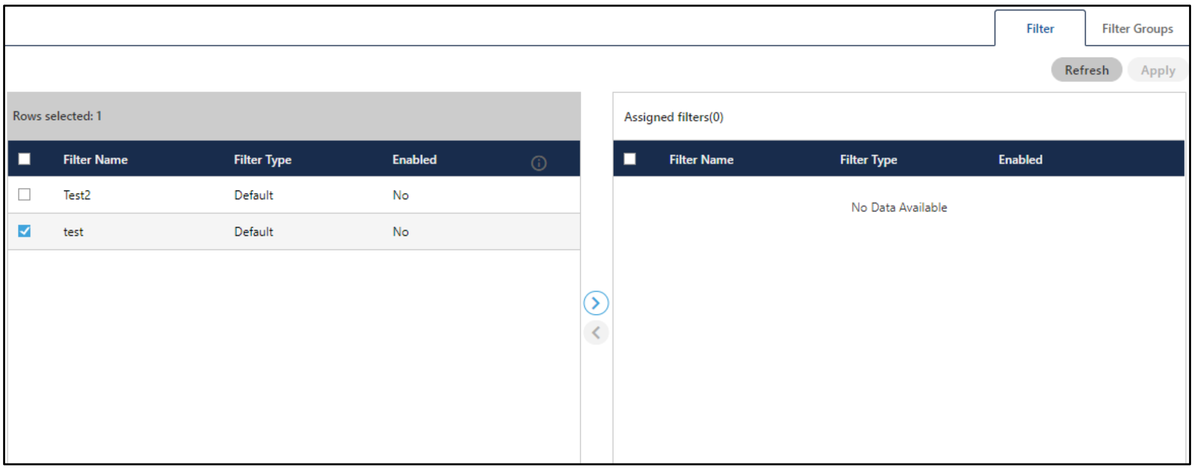


Figure: Customer Filter Settings

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.

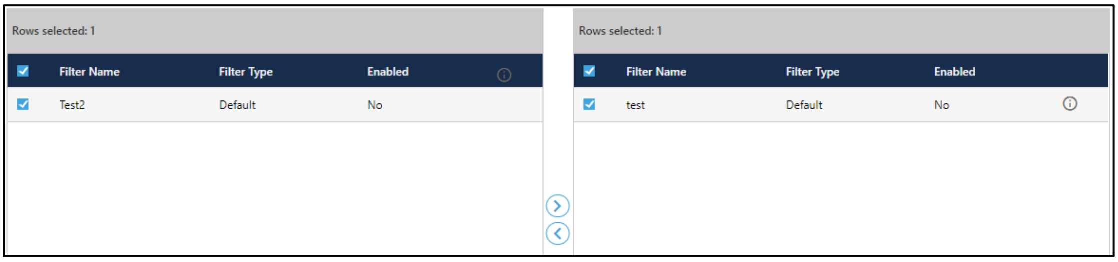
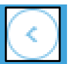


Figure: Assign or Unassign Customer Filters

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.

11.4.2.3 Filter Group Tab of Customers Tab

You can either use "Filter" or "Filter Groups" to filter the Customers while dialing in the campaign. If you activate "Filter Group", you cannot use "Filters".

It allows you select a Filter Group to filter the numbers of customers to be dialed. This tab shows the filters, which you have created for Outbound Campaign in "System Configuration" → "Table" → "Filter Groups". Know more...

The selected campaign will show the Filter Groups and Filters created in that campaign only.

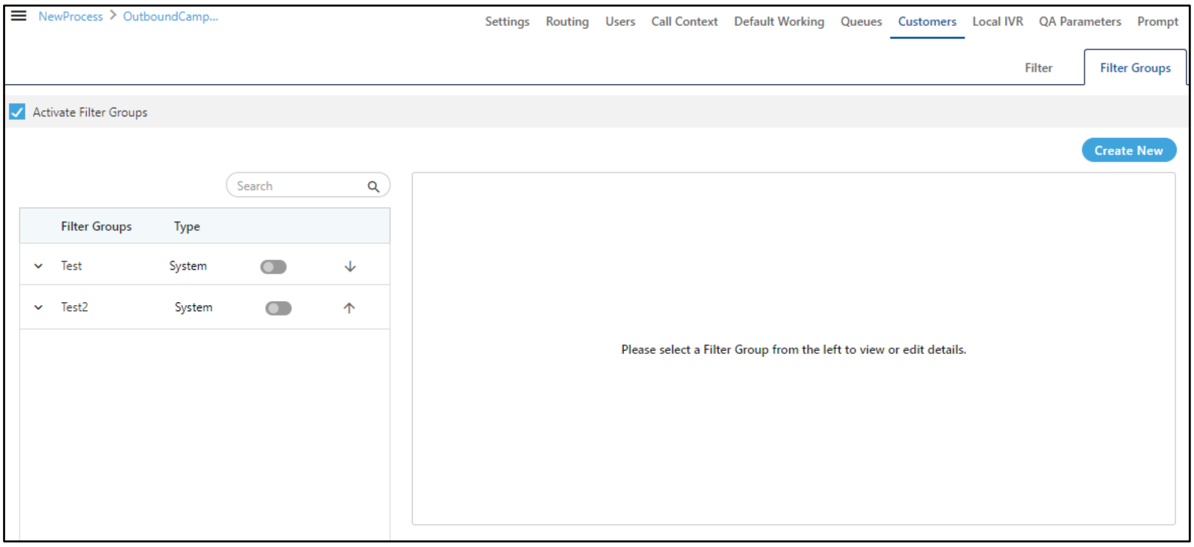


Figure: Customer Filter Groups

Here, you can perform the similar steps what you have performed in "Filter Groups" tab in "System" → "System Configuration" → "Table" → "Filter Groups". You can create a new Filter Group, view its details, modify it, and delete it. Know more...

11.4.2.3.1 Configure Number of Filter Groups to be applied on a Campaign

By default, the Administrator can enable up to 10 Filter Groups on a campaign. However, this number is customizable. At the Linux-based machine running Ameyo AppServer, the Administrator has to run the following commands.

Run the following command to enter the PostgreSQL Console as a PostgreSQL user and access the product database.

psql -U postgres <Product_Database>

Replace <Product_Database> with the name of your product database.

Run the following command to increase the limit of Filter Groups that can be applied to a Campaign.

insert into system_configuration_parameter (name,type,value,default_value) values ('maximumAllowedEnabledTableFilterGroups','Integer','<Value_in_Number>','10');

Replace "<Value_in_Number>" with the number of Filter Groups to be applied on a campaign.

For more information about this command, please refer to Point 14 at https://sites.google.com/a/ameyo.com/engineering/professional-release-notes/certified-releases/r4-xx/r4_00-certified-release-for-deployment/configuration/voice-configuration/flags-in-server_preference_store.

11.5 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 Predictive Voice Campaign will be applicable to that campaign itself. They will not be applicable on other similar (parallel) and different (non-parallel) campaigns.

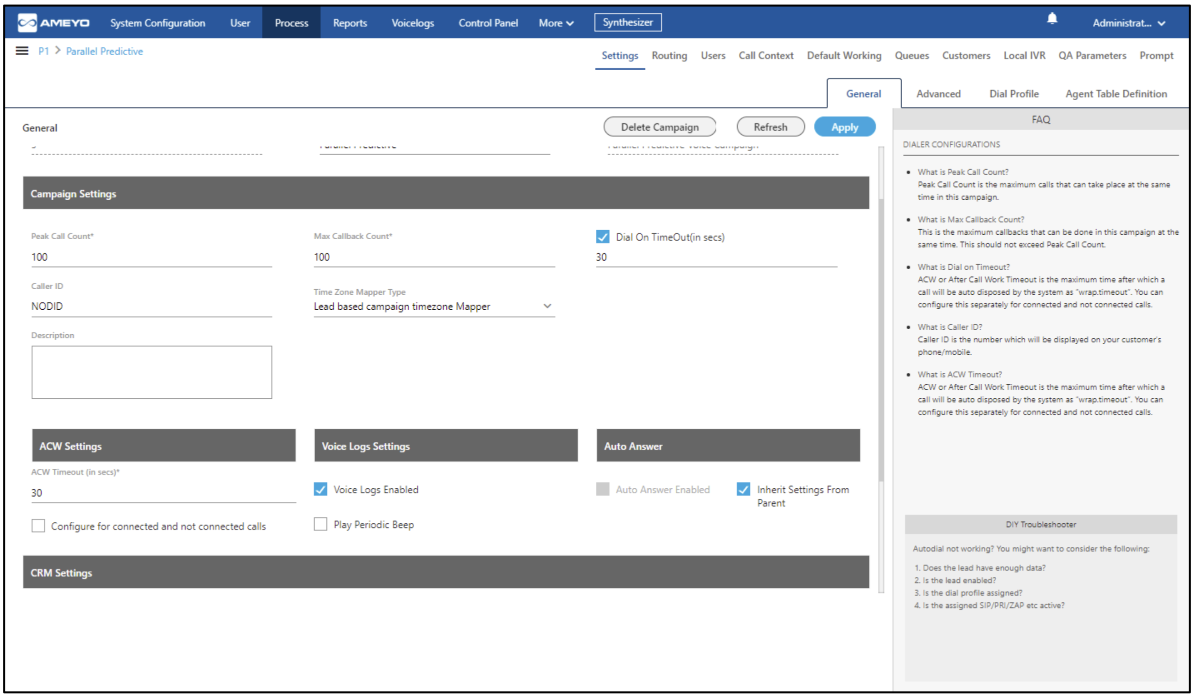


Figure: Settings of Parallel Predictive Voice Application Campaign

At the right side of the campaign settings page, some of the commonly asked definitions of settings are defined. You can refer to those definitions.

It contains the following tabs.

- Settings
  - General Settings
  - Advanced Settings
  - Dial Profile Settings
  - Agent Table Definition
- Queues
- Routing
- Users

- Default Working
- Holiday/Office Hours
- Call Context
- Customers
- Local IVR
- QA Parameters
- Prompt

11.5.1 Settings Tab of Parallel Predictive Dialing Campaign

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

11.5.1.1 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.

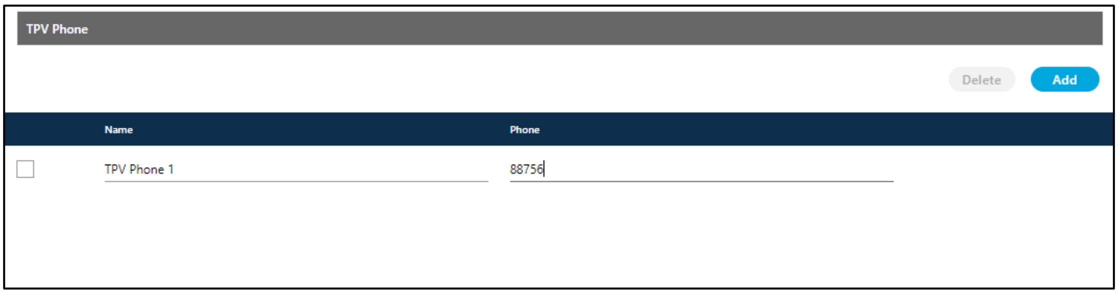


Figure: TPV Phone

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".

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.

11.5.1.2 Advanced Settings

Here, the Administrator can configure the Advanced Settings of a Parallel Predictive Voice Campaign.

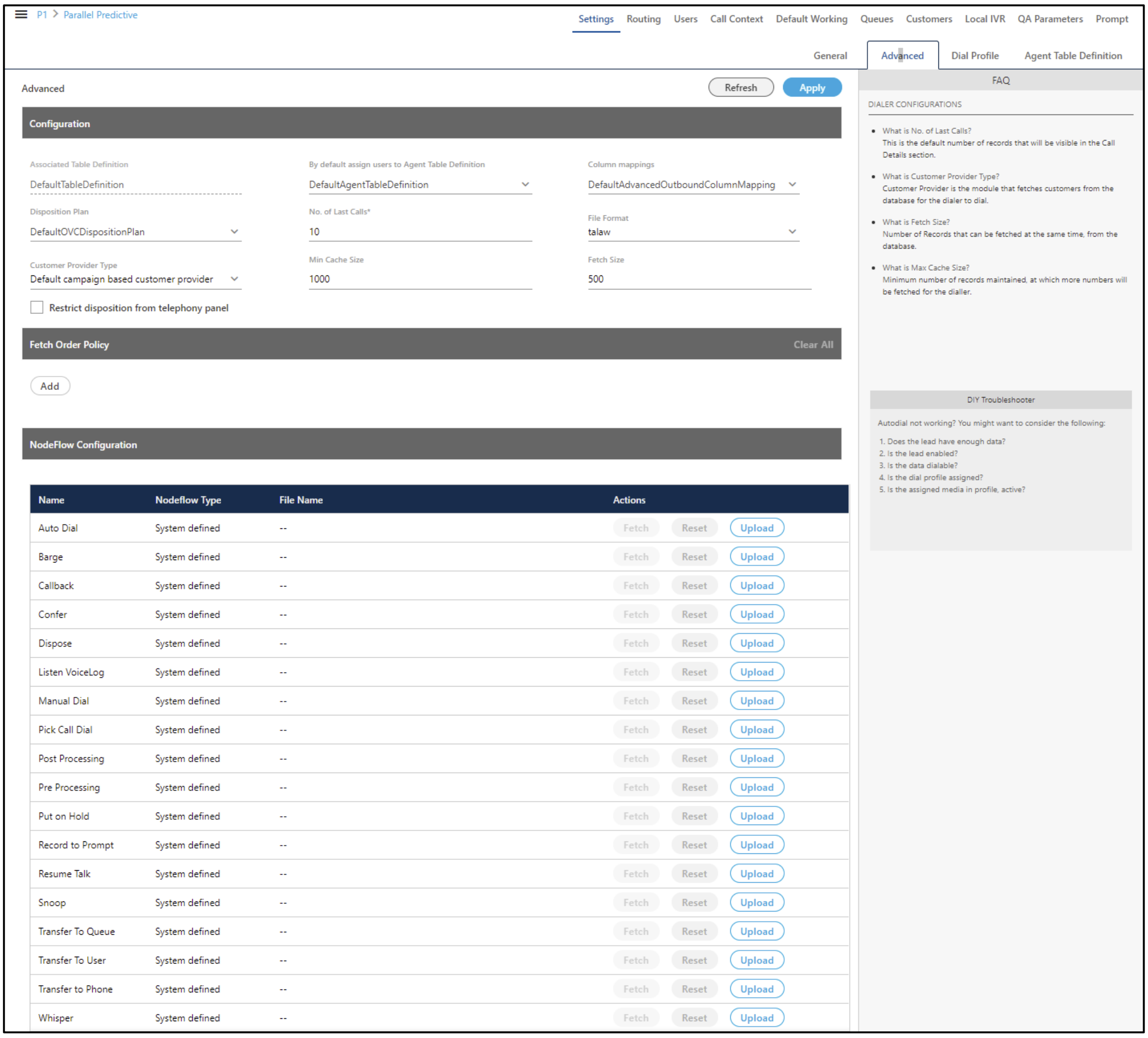


Figure: Advanced Settings

This tab can be divided into these sections: "Configuration", "Fetch Order Policy", and "NodeFlow Configuration".

11.5.1.2.1 Configuration

It contains the following settings, which you have configured while creating the campaign.

- Disposition Plan
- Column Mappings
- No. of Last Calls

- File Format

It also contains the following settings, which you can configure after creating the Outbound Campaign.

- **Default Table Definition:** Here, you can select the default Table Definition for this campaign.
- **By default assign users to Agent Table Definition:** Here, you can select the default Agent Table Definition for this campaign.
- **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 Predictive 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 Predictive 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.

11.5.1.2.1.1 Restrict Disposition from Telephony Panel

In the Contact Center Industry, the business prefers to dispose of the Calls from the CRM, especially which is linked with Ameyo Application Server. The agents have two different ways to dispose of the single call - one through Telephony Panel and another through CRM. If the agent was disposing of the calls in both of the ways, then there will be two dispositions for a single call that can create confusion and discrepancy.

To avoid this discrepancy, a configuration named "Restrict disposition from Telephony Panel" is added in "Advanced" Tab of Voice Campaign Settings. Know more...

11.5.1.2.2 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 campaign. After selecting it, you can select ascending or descending order of the sorting the numbers.

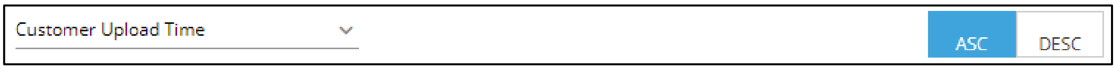


Figure: "Customer Upload Time" Fetch Order Policy

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.

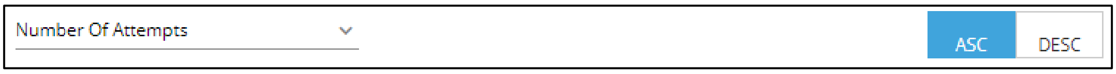


Figure: "Number of Attempts" Fetch Order Policy

- **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.

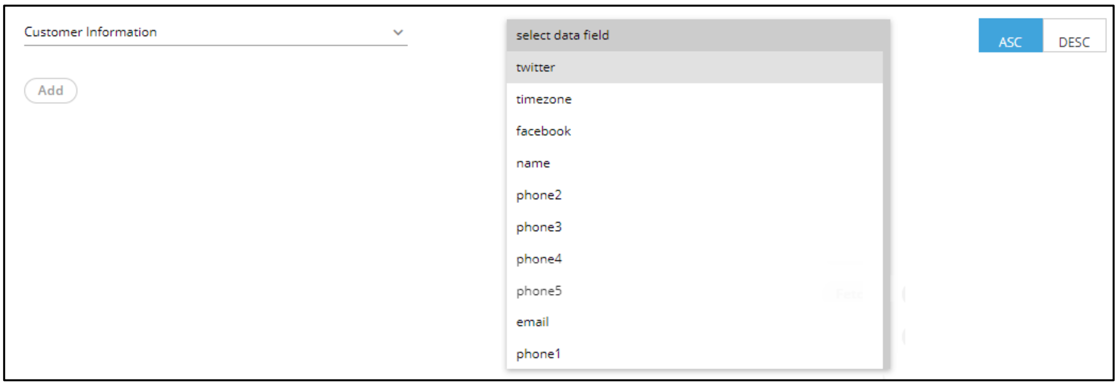


Figure: "Customer Information" Fetch Order Policy

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.

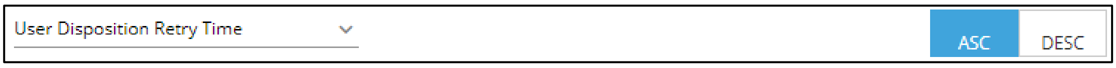


Figure: "User Disposition Retry Time" Fetch Order Policy

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.

11.5.1.2.3 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
- Whisper
- Pre Processing
- Auto Dial

11.5.1.3 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.

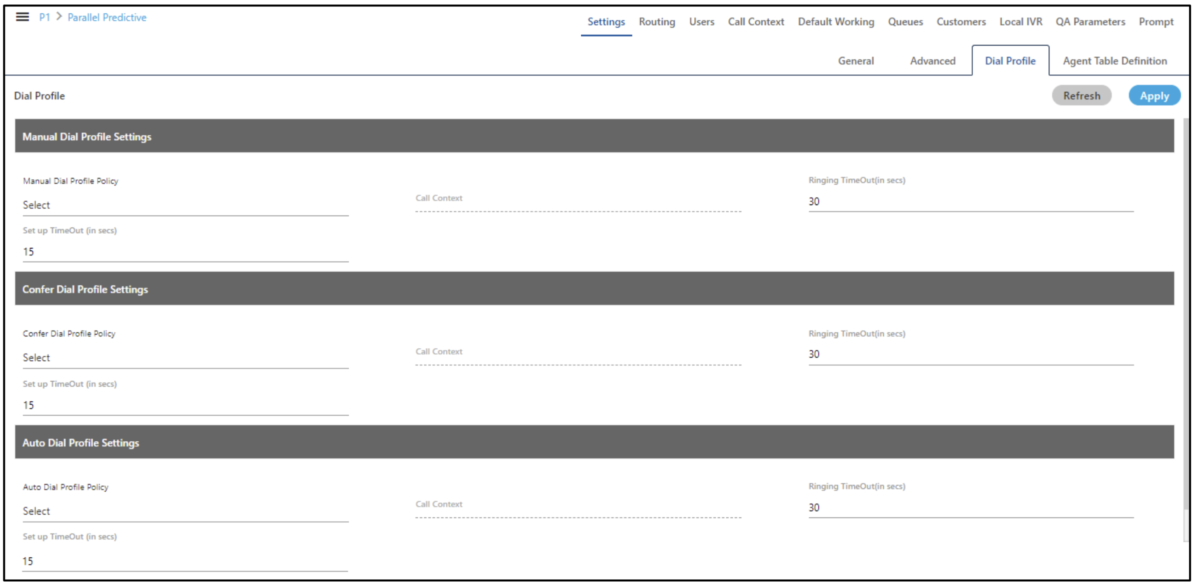


Figure: Dial Profile Settings

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 the "Call Context" column.

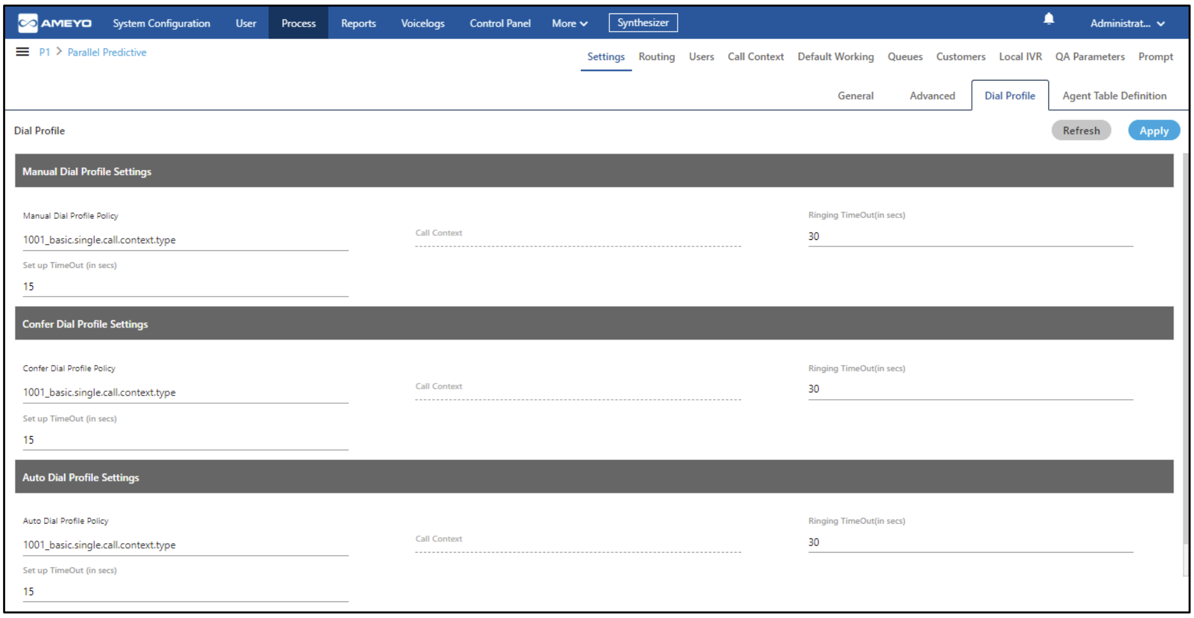


Figure: Configured Dial Profile Settings

11.5.1.4 Agent Table Definition

This tab allows you to select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition. Know more...

11.5.2 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...

11.5.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the Inbound Campaign Settings. Know more...

11.5.4 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...

11.5.5 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...

11.5.6 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...

11.5.7 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

11.5.8 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...

11.5.9 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...

11.5.10 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...

11.5.11 Customer Tab

Here, you can assign and unassign the customer filters and group the filters in this campaign. This tab has already been explained in "Outbound Voice Campaign". Know more...

11.6 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 Predictive 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.

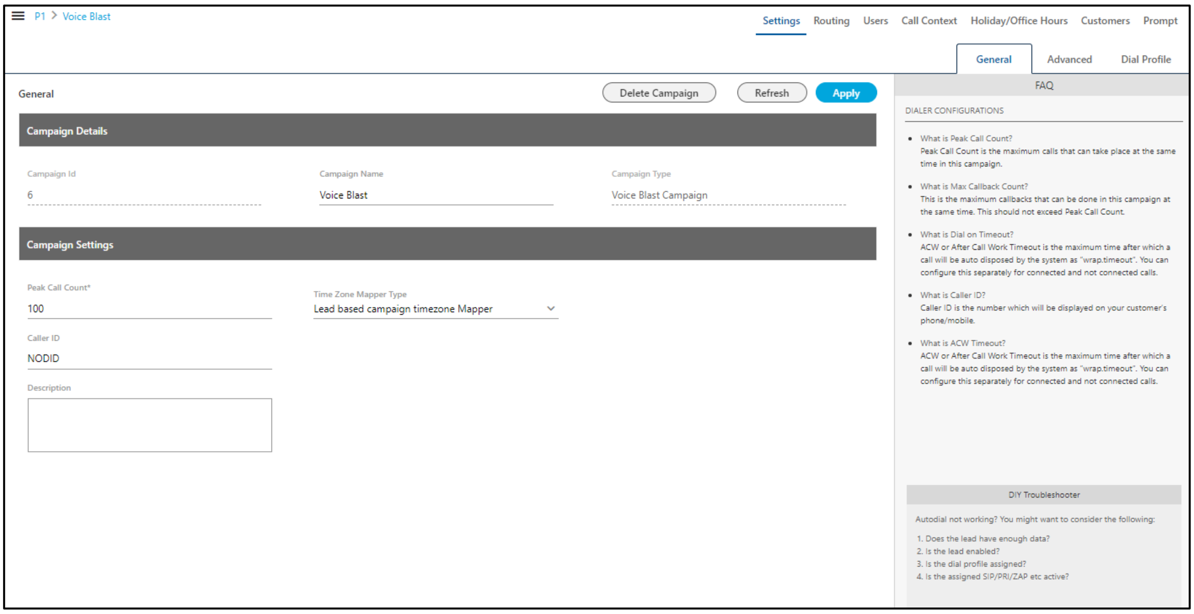


Figure: Settings of Voice Blast Campaign

At the right side of the campaign settings page, some of the commonly asked definitions of settings are defined. You can refer to those definitions.

It contains the following tabs.

- Settings
    - General Settings
    - Advanced Settings
    - Dial Profile Settings
- Queues
- Routing
- Users
- Holiday/Office Hours
- Call Context

- Customers
- Prompt

11.6.1 Settings of Voice Blast Campaign

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

11.6.1.1 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.

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.

11.6.1.2 Advanced Settings

Here, the Administrator can configure the Advanced Settings of a Voice Blast Campaign.

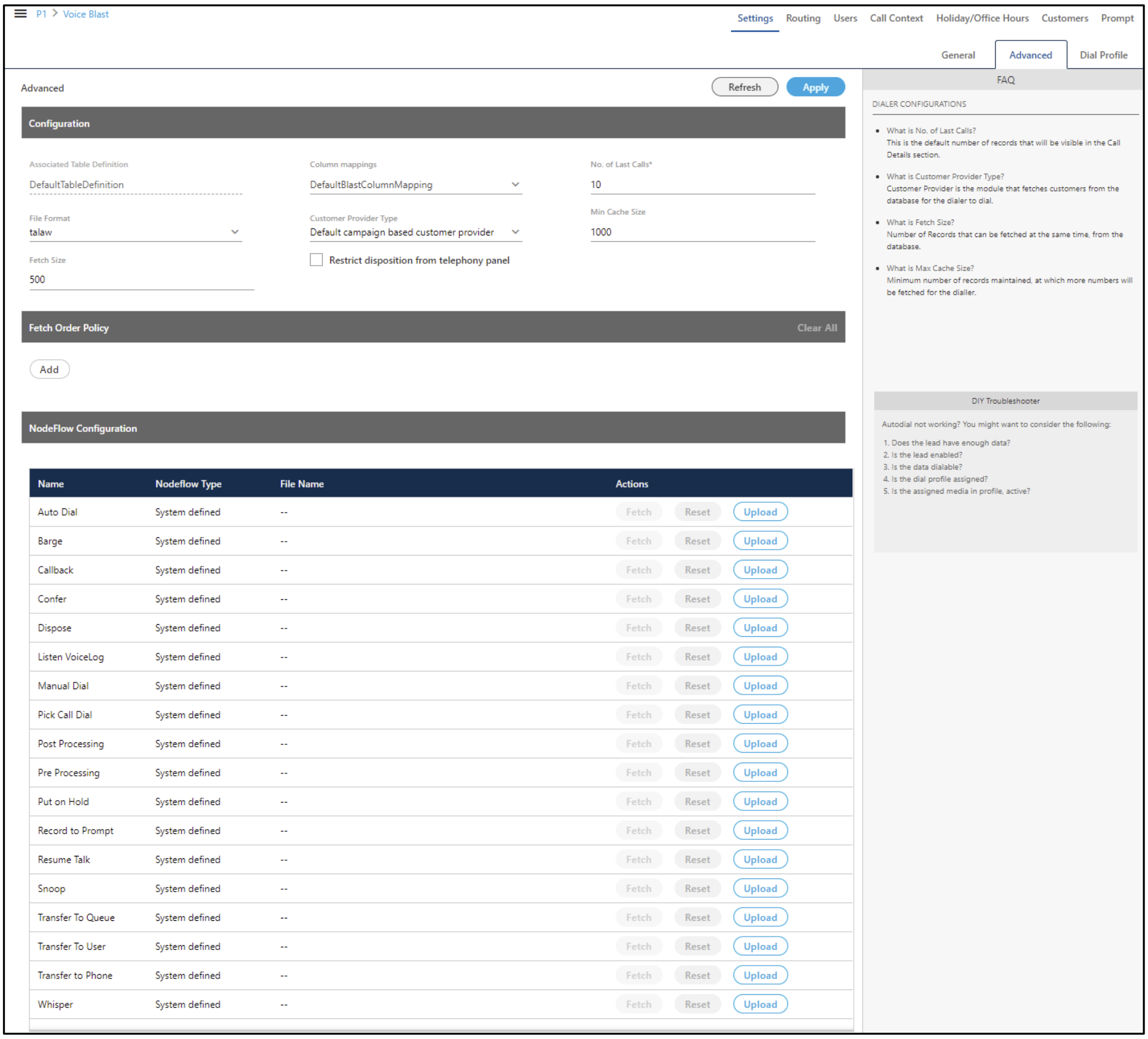


Figure: Advanced Settings

This tab can be divided into these sections - "Configuration", "Fetch Order Policy", and "NodeFlow Configuration".

11.6.1.2.1 Configuration

Except for 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 Predictive Parallel Campaign.
  - Lead Based Customer Provider: It can be used to dial the numbers as per the lead priority. Customers with the 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 Predictive 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.

11.6.1.2.1.1 Restrict Disposition from Telephony Panel

In the Contact Center Industry, the business prefers to dispose of the Calls from the CRM, especially which is linked with Ameyo Application Server. The agents have two different ways to dispose of the single call - one through Telephony Panel and another through CRM. If the agent was disposing of the calls in both of the ways, then there will be two dispositions for a single call that can create confusion and discrepancy.

To avoid this discrepancy, a configuration named "Restrict disposition from Telephony Panel" is added in "Advanced" Tab of Voice Campaign Settings. Know more...

11.6.1.2.2 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 campaign. After selecting it, you can select ascending or descending order of the sorting the numbers.

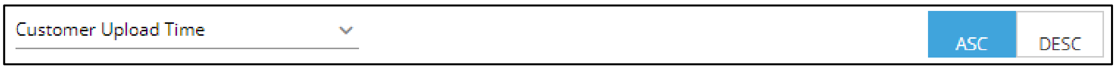


Figure: "Customer Upload Time" Fetch Order Policy

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.

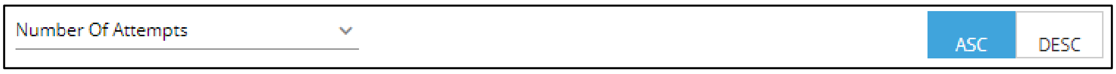


Figure: "Number of Attempts" Fetch Order Policy

- **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.

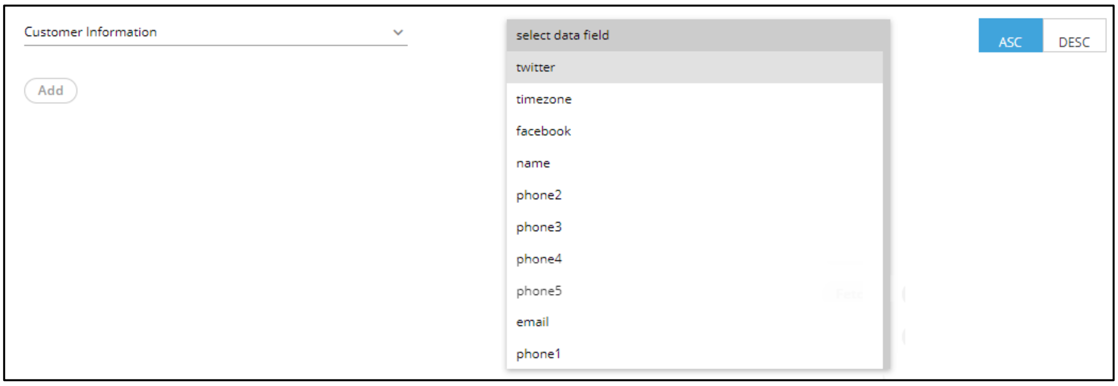


Figure: "Customer Information" Fetch Order Policy

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.

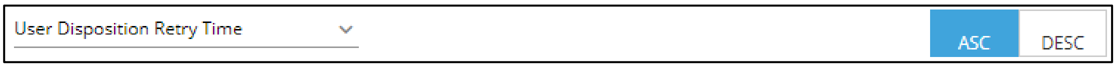


Figure: "User Disposition Retry Time" Fetch Order Policy

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.

11.6.1.2.3 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

11.6.1.3 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.

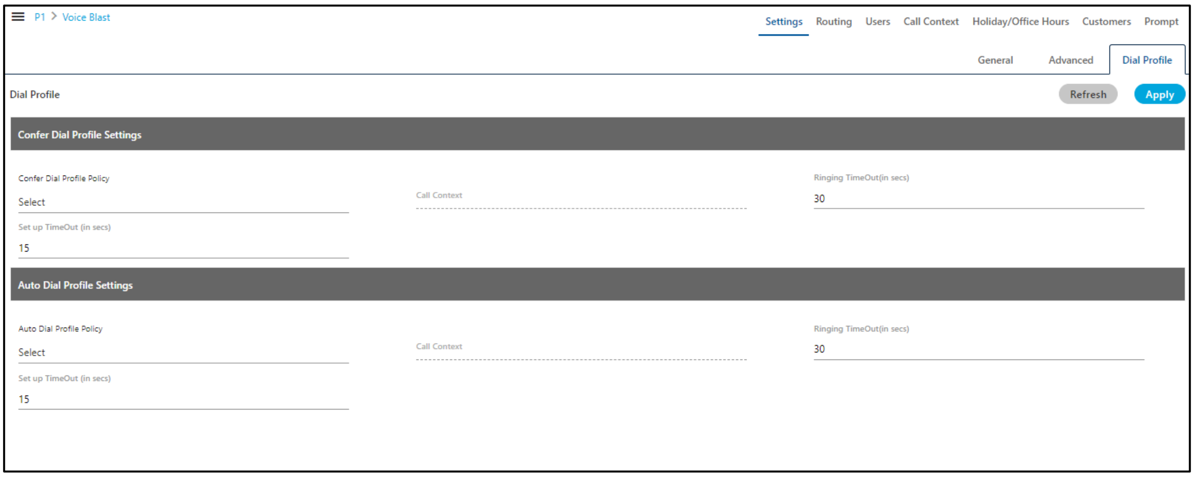


Figure: Dial Profile Settings

Perform the following steps to configure the Dial Profile Settings for 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. **<u>Auto Dial Profile Settings</u>:** 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 the "Call Context" column.

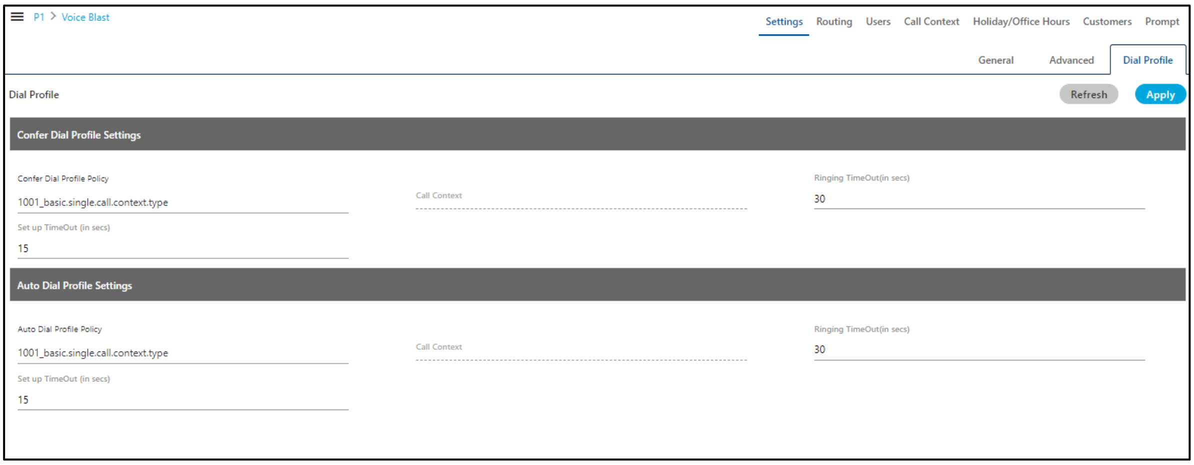


Figure: Configured Dial Profile Settings

11.6.2 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...

11.6.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the Inbound Campaign Settings. Know more...

11.6.4 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...

11.6.5 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...

11.6.6 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". Know more...

11.6.7 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...

11.6.8 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...

11.7 Common Backend Configurations for all types of Campaigns

There are several configurations through which the User (who has administrative privileges over the Server OS running Ameyo Application server) is able to optimize the Ameyo and increase it's usage according to the organizational need. These configurations are the common configurations that can be used with any kind of setup such as Voice setup, Voice+IC setup, and IC setup.

All of these queries will be executed for the product database. Execute the following command to login to the database.

psql -U postgres <Ameyo_Database_Name>

The database name in the above command is the name of the database which is configured to run the appserver. For example, ameyodb is the product database in our test case.

11.7.1 Configuration for One-Level Disposition

The users of Ameyo has the privilege to dispose the voice calls or interaction tickets in two possible ways, that is, one-level disposition, and two-level disposition. Two-level disposition is the default feature of Ameyo. However, the Administrator has the privilege to configure one-level disposition for the agents.

- Execute the following query to disable two-level disposition and enable one-level disposition in Ameyo app setup.

  INSERT INTO server_preference_store (context_type,context_id,key,value) VALUES ('system','<Contact_Center_Id>','showTwoLevelDisposition','false');

- Execute the following query to disable two-level disposition and enable one-level disposition toolbar setup.

  INSERT into server_preference_store (context_type,context_id,key,value) VALUES ('system','<Contact_Center_Id>','twoLevelDispositionEnabled','false');

11.7.2 Disable Dialing of Alphabet Strings

Execute the following query to disable the dialing of alphabet string through dialing screen of the agent.

INSERT INTO server_preference_store (context_type ,context_id,key,value) VALUES ('contactCenter','<contact_center_id>','shouldAllowAlphabetsInPhone','true');

11.7.3 Resolve Customers using last 10 digits of Phone Number

There are multiple cases when the customers' phone numbers are received in different formats, such as with country code, without country code, with zero (0), or without zero (0). Even if a customer's number contains more than 10 digits and the first 2 or 3 digits represent the country code, still the method to resolve the customer for WhatsApp Chat was considering only the first 10 digits. This was making the customer's phone number unresolvable.

In such a case, a backend configuration, named "phoneDigitsToBeConsideredFromEnd" can be done, which allows the system to consider only the last 10 digits of the customer's phone number. It means that the system will read the phone number starting from the end to the previous 10 digits.

For Example: Suppose the phone number of the customer IS "9876789812". Now, the customer's phone number appears like "+919876789812", "09876789812", and "9876789812". Thus, the system can assume this phone number as three-different phone numbers. But with this configuration, only the last 10 digits will be calculated, which is the "9876789812".

Execute the following query:

INSERT INTO system_configuration_parameter(name,type,value,default_value) VALUES ('phoneDigitsToBeConsideredFromEnd','String',10','10');

11.7.4 Configuring the Default Landing Page for Agents

Execute the following query to update the Default Landing page for agents that will be shown to the agents after their logon.

INSERT INTO server_preference_store(context_type,context_id,key,value) VALUES('contactCenter',<contact_center_id>,'defaultLandingPageForIC','<Landing_Page_Option>');

where, <Landing_Page_Option> is the page at which the agent will land after their logon. The possible values are **KnowledgeBase** and **TicketDashboard.**

12. Feedback Form

In Ameyo, the administrator can configure the feedback forms. Feedback forms can be used to collect the feedback from the customers for the services received from the organization. It helps the organization to evaluate and enhance their services.

There are two types of feedback forms available to configure in ameyo.

1. Feedback form for Chat
2. Feedback form for Email

12.1 Feedback Form for Chat

Feedback form for chat includes the following type of chat media which are supported on Ameyo.

1. Webchat
2. WhatApp
3. Messenger
4. Telegram
5. Twitter
6. Twillio
7. Line
8. Viber
9. WeChat
10. MessageBird

The tickets received through any of the above chat channels are termed as chat tickets. The feedback form will send to the customers after the provided condition fulfills. It helps the customer to provide feedback for the services received from the organization.

Perform the following steps to configure the feedback form in chats.

1. **Database Entries:** There are some steps and configurations which you have to so in database in order to integrate feedback form with email.

   Perform the following steps to access the database.

   A. Login to the backend, to access the database.

   B. psql -U postgres <ameyo_database_name>

   Provide the following entries in database tables.

   C. **Scheme for Feedback Questions:** It is needed to create a schema for the feedback form in chat in order to map the feedback form with any type of chat in "**chat_feedback_schem**" table.

   Execute the following query.

   INSERT INTO chat_feedback_scheme (chat_feedback_scheme_id,name,chat_feedback_scheme_type,feedback_text,feedback_items,max_payload_value,is_mandatory) VALUES (2,'feebackForm','optionSelectionType','Rate our performace','{"Good":{"payloadValue":2},"Satisfactory":{"payloadValue":1},"Worst":{"payloadValue":0}}',2,'t');

```
ameyodb=# insert into chat_feedback_scheme (chat_feedback_scheme_id,name,chat_feedback_scheme_type,feedback_text,feedback_items,max_payload_value,is_mandatory) values (
2,'feebackForm','optionSelectionType','Rate our performace','{"Good":{"payloadValue":2},"Satisfactory":{"payloadValue":1},"Worst":{"payloadValue":0}}',2,'t');
INSERT 0 1
ameyodb=# select * from chat_feedback_scheme;
-[ RECORD 1 ]-------------+------------------------------------------------------------------------------------------
chat_feedback_scheme_id   | 1
name                      | default feedback scheme
chat_feedback_scheme_type | optionSelectionType
feedback_text             | Rate us please
feedback_items            | {"High":{"payloadValue":3},"Medium":{"payloadValue":2},"Low":{"payloadValue":1}}
max_payload_value         | 3
date_added                | 2019-07-02 15:12:09.731011
date_modified             | 2019-07-02 15:12:09.731011
is_mandatory              | f
-[ RECORD 2 ]-------------+------------------------------------------------------------------------------------------
chat_feedback_scheme_id   | 2
name                      | feebackForm
chat_feedback_scheme_type | optionSelectionType
feedback_text             | Rate our performace
feedback_items            | {"Good":{"payloadValue":2},"Satisfactory":{"payloadValue":1},"Worst":{"payloadValue":0}}
max_payload_value         | 2
date_added                | 2019-08-22 15:14:39.461872
date_modified             | 2019-08-22 15:14:39.461872
is_mandatory              | t

ameyodb=#
```

Figure: Feedback Scheme for Feedback Form

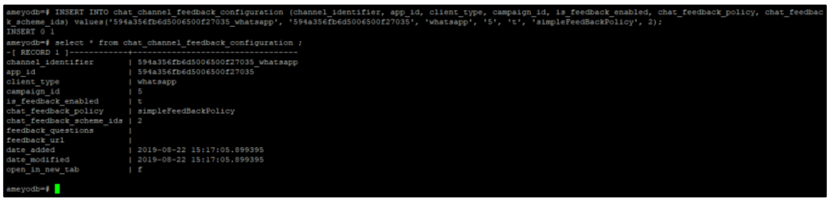
The scheme value for all types of chat are same. There is no need to provide another value for any other mode of chat.

D. **Configure feedback form for various Chat profiles:** After defining the questions of the feedback form, now configure the feedback form for the various types of chats. Feedback form can be configured with two cases.

   I. Integrating the questions form the chat_feedback_scheme table. In this case, the questions which are defined in the chat_feedback_schem table will deliver to customer in the same way as they are defined in table.

      a. **Feedback form for WhatsApp:** Execute the following query to configure the feedback form for WhatsApp chat in "**chat_channel_feedback_configuration**" table.

         INSERT INTO chat_channel_feedback_configuration (channel_identifier, app_id, client_type, campaign_id, is_feedback_enabled, chat_feedback_policy, chat_feedback_scheme_ids) values('<Whatsapp_ID>_whatsapp', '<WhatsApp_ID>', 'whatsapp', '<Cmapaign_Id>', 't', 'simpleFeedBackPolicy','<Feedback_Scheme_ID>');



```
ameyodb=# INSERT INTO chat_channel_feedback_configuration (channel_identifier, app_id, client_type, campaign_id, is_feedback_enabled, chat_feedback_policy, chat_feedback_scheme_ids) values('594a356fb6d5006500f27035_whatsapp', '594a356fb6d5006500f27035', 'whatsapp', '5', 't', 'simpleFeedBackPolicy', 2);
INSERT 0 1
ameyodb=# select * from chat_channel_feedback_configuration ;
-[ RECORD 1 ]-----------+--------------------------------
channel_identifier      | 594a356fb6d5006500f27035_whatsapp
app_id                  | 594a356fb6d5006500f27035
client_type             | whatsapp
campaign_id             | 5
is_feedback_enabled     | t
chat_feedback_policy    | simpleFeedBackPolicy
chat_feedback_scheme_ids | 2
feedback_questions      |
feedback_url            |
date_added              | 2019-08-22 15:17:05.899395
date_modified           | 2019-08-22 15:17:05.899395
open_in_new_tab         | f

ameyodb=#
```

Figure: Feedback Form configuration for WhatsApp

b. **<u>Feedback form for Viber</u>:** Execute the following query for configuration of feedback form with Viber chat.

INSERT INTO chat_channel_feedback_configuration (channel_identifier, app_id, client_type, campaign_id, is_feedback_enabled, chat_feedback_policy, chat_feedback_scheme_ids) values('594a356fb6d5006500f27035_viber', '594a356fb6d5006500f27035', 'viber', '5', 't', 'simpleFeedBackPolicy', 2);

1.

A.

I.

- In above query, the "**Whatsapp_ID**" is the ID received from WhatsApp while configuring the

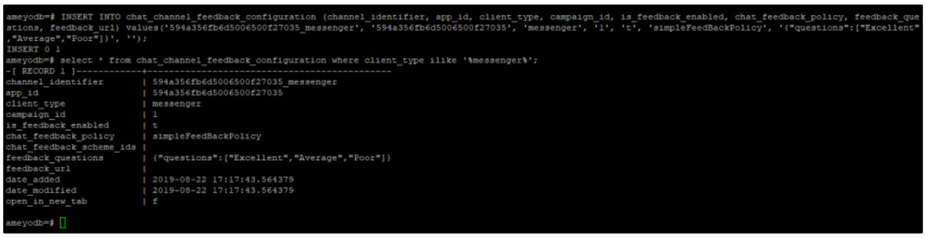
WhatsApp business account. After writing id provide "**_whatsapp**" to tell the ameyo that the id is of WhatsApp account.

- "**App_Id**" is the same id of WhatsApp account.
- "**Client_Type**" is the mode of chat which is WhatsApp in this case.
- "**Campaign_Id**" is the Id of the chat campaign in which the WhatsApp is configured.
- "**Feedback_scheme_Id**" is the Id of chat_feedback_scheme table in which scheme was configured in previous step.

II. The another method is defining all the questions while configuring the feedback form for the specific chat channel.

Feedback Form for Messenger: Execute the following query to configure feedback form while defining the questions with configuring the feedback form. Execute the following query.

INSERT INTO chat_channel_feedback_configuration (channel_identifier, app_id, client_type, campaign_id, is_feedback_enabled, chat_feedback_policy, feedback_questions, feedback_url) values(''<Messenger_ID>_messenger', '<Messenger_ID>', 'messenger', '<Cmapaign_Id>', 't', 'simpleFeedBackPolicy', '{"questions":["<Selection_Type_1>","<Selection_Type _2>","<Selection_Type_3>"]}', '');



```
ameyodb=# INSERT INTO chat_channel_feedback_configuration (channel_identifier, app_id, client_type, campaign_id, is_feedback_enabled, chat_feedback_policy, feedback_que
stions, feedback_url) values('594a356fb6d5006500f27035_messenger', '594a356fb6d5006500f27035', 'messenger', '1', 't', 'simpleFeedBackPolicy', '{"questions":["Excellent"
,"Average","Poor"]}', '');
INSERT 0 1
ameyodb=# select * from chat_channel_feedback_configuration where client_type ilike '%messenger%';
-[ RECORD 1 ]-----------+-----------------------------------------
channel_identifier      | 594a356fb6d5006500f27035_messenger
app_id                  | 594a356fb6d5006500f27035
client_type             | messenger
campaign_id             | 1
is_feedback_enabled     | t
chat_feedback_policy    | simpleFeedBackPolicy
chat_feedback_scheme_ids |
feedback_questions      | {"questions":["Excellent","Average","Poor"]}
feedback_url            |
date_added              | 2019-08-22 17:17:43.564379
date_modified           | 2019-08-22 17:17:43.564379
open_in_new_tab         | f

ameyodb=#
```

Figure: Feedback Form configuration for Messenger

- "**Selection_Type**" is the selection type of the question which you want to send to customer and the customer is supposed to select any one selection from the sections provided in the question.

Both the above types of feedback form configuration can be done for any chat type. You can use any chat type for both of the above configuration type of feedback forms.

It is not possible to send multiple questions to single customer with only one configured Webhook. Only one question can be configured for single media type at a time with one App ID.

2. **Restart AppServer:** After all the configurations, restart appserver to inherit all the configurations to the appserver.

1.

- Execute the following command to stop the service.

  ameyoctl service appserver stop

- Execute the following command to start the service.

  ameyoctl service appserver start

12.1.1.1 Sample Feedback Form

Following are the sample feedback forms.

1. **Feedback Form Delivery through WhatsApp Chat :** After all the configurations, the feedback form is ready to deliver to the customer. The feedback form will deliver to customer only after the provided condition in the above rule satisfies.

   Once the provided condition satisfies, the feedback form over the same chat channel will send to the customer.

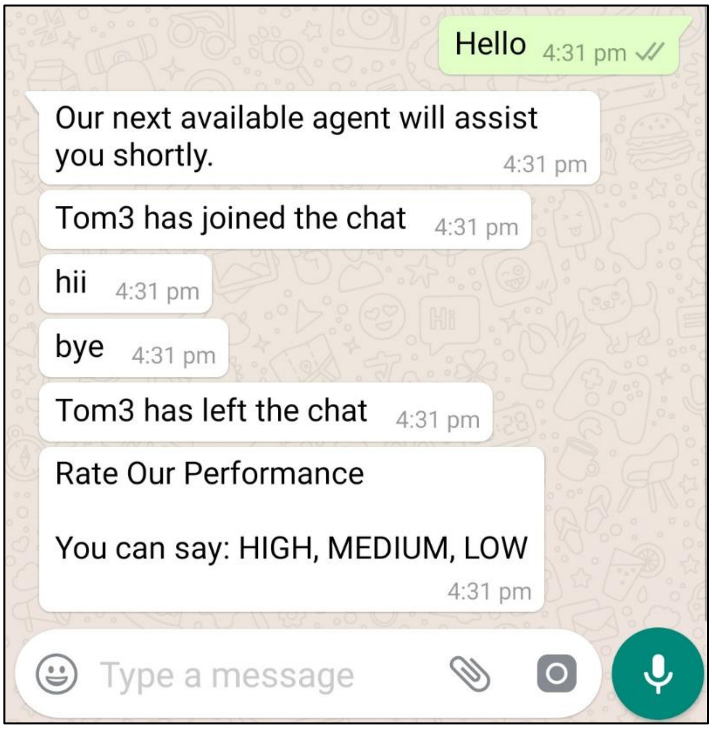


Figure: Sample Feedback Form through WhatsApp chat

2. **Sample Feedback Form with Ameyo WebChat:** The following is the sample feedback form configured with Ameyo WebChat.

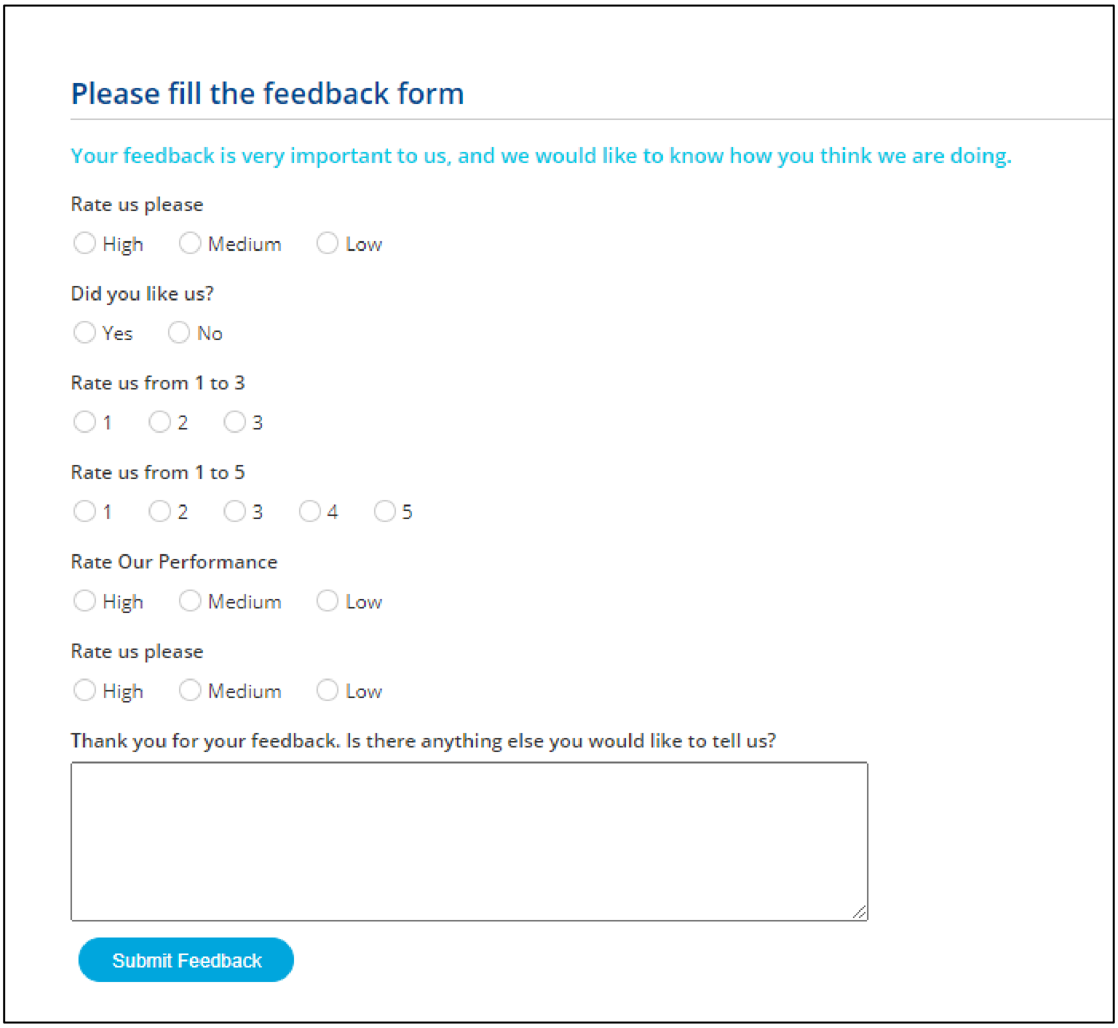


Figure: Sample Feedback Form through Ameyo WebChat

12.2 Feedback Form for Email

Feedback form for Email is used in the Interaction Campaign. The feedback form will send to the customers after the provided conditions are fulfilled. It helps the customer to provide feedback for the services received from the organization.

Perform the following steps to integrate feedback form for Email.

1. **<u>Database Entries</u>:** There are some steps and configurations which you have to so in database in order to integrate feedback form with email.

   Perform the following steps to access the database.

   A. Login to the backend, to access the database.

      psql -U postgres <ameyo_database_name>

   B. Provide the following entries in database tables.

      I. **<u>Ameyo URL mapping in system_configuration_parameter Table</u>:** Provide Ameyo URL mapping in system_configuration_parameter table. Execute the following command.

         INSERT INTO system_configuration_parameter (name,type,value,default_value) VALUES ('ameyoServerUrl','String','<ameyo_server_url:Ameyo Port>','<ameyo_server_url:AmeyoPort>');

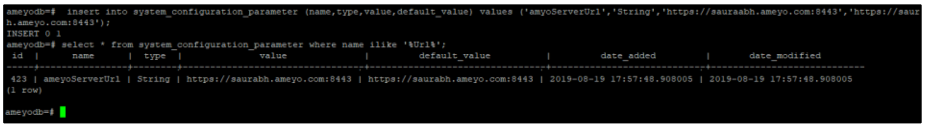


Figure: Ameyo URL Authentication

      II. **<u>Feedback Form Scheme in feedback_scheme Table</u>:** Create a scheme for the feedback form which will use further for the integration of feedback in Rule creation.

         Execute the following command.

         INSERT INTO feedback_scheme (feedback_scheme_name,contact_center_id) values ('<feedback_scheme_name>','<contact_center_id>');

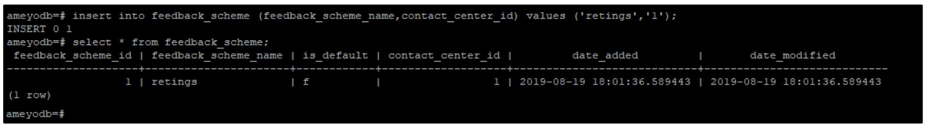


Figure: Feedback Scheme Entry

- Here, the feedback scheme name is the name of the feedback form.

III. **Feedback Form questions in feedback_question Table**: Insert all questions which you want to ask from the customer in the feedback form.

Execute the following command.

INSERT INTO feedback_question (name,feedback_question_type,question_text,max_payload_value,is_mandatory,question_order,feedback_scheme_id) VALUES ('<Question_Name>','<Feedback_Question_Type>','<Question>', '<Payload_Value>','t','<Feedback_Scheme_Id>','<Order_of_Question>');

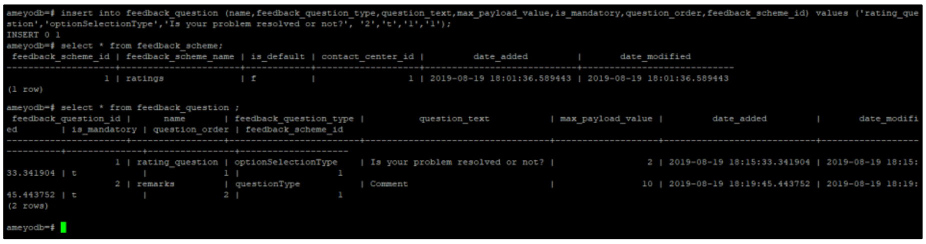


Figure: Feedback Questions

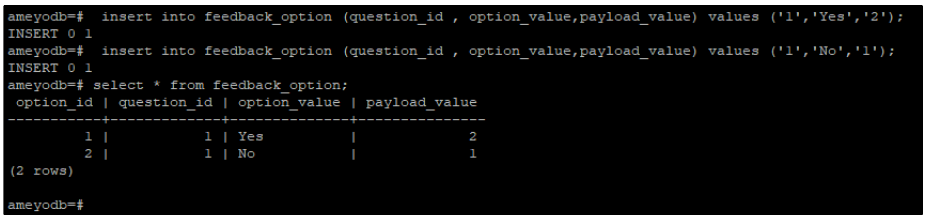
- <Question_Name> is the name of the question from which you want to describe your question.

- <Feedback_question_type> is the type of the feedback form, you can enter "**optionSelectionType**" for selecting one option from many and "**questionType**" for the comment box.
- <Payload_Value> is the value of the options according to their priorities.
- <Feedback_Scheme_Id> is the feedback scheme id with which you want to map the question with the created scheme name in above query.
- <Order_of_Question> is the order of the asked question. if there are multiple questions in the same scheme.

IV. **<u>Feedback Form Options in feedback_options Table</u>:** Create a scheme for the feedback form which will use further for the integration of feedback in Rule creation.

Execute the following command.

INSERT INTO feedback_option (question_id , option_value,payload_value) values ('<Question_Type>','<Option_Selection_Type>','<payload_value>');



```
ameyodb=#  insert into feedback_option (question_id , option_value,payload_value) values ('1','Yes','2');
INSERT 0 1
ameyodb=#  insert into feedback_option (question_id , option_value,payload_value) values ('1','No','1');
INSERT 0 1
ameyodb=# select * from feedback_option;
 option_id | question_id | option_value | payload_value
-----------+-------------+--------------+---------------
         1 |           1 | Yes          |             2
         2 |           1 | No           |             1
(2 rows)

ameyodb=#
```

Figure: Feedback Scheme Entry

- "Option_Selection_Type" is the selection option if there are multiple options which needs to be inherrit in case when the Feedback form has question to be selected and the "Payload_value" should not be greater than the provided payload value in that question.

  Create multiple options for the same question with the above same query.

C. **Restart AppServer:** After all the configurations, restart appserver to inherit all the configurations to the appserver.

1.

A.

- Execute the following command to stop the service.

  ameyoctl service appserver stop

- Execute the following command to start the service.

  ameyoctl service appserver start

B. **Rule Creation:** After creating all the above configurations in the database, now, create a rule for the feedback form to provide the condition when and how the feedback form will deliver to the customer.

Perform the following steps to create a rule corresponding to the configurations done.

1.

A.

I. Login the Ameyo with Administrator account and go to the rule engine page.

II. Switch the tab to Event Based Rule and create a rule.

III. Create a event based rule, and provide campaign name and the condition on which the feedback form will send to the customer. Know more...

IV. Select "**Send Feedback To Requester**" in the Actions and select the feedback scheme from the drop-down list. Provide the media profile from which you want to send the feedback mail, enter the subject which will enter as the subject of the feedback email, enter the email text in text format, and click Save button.

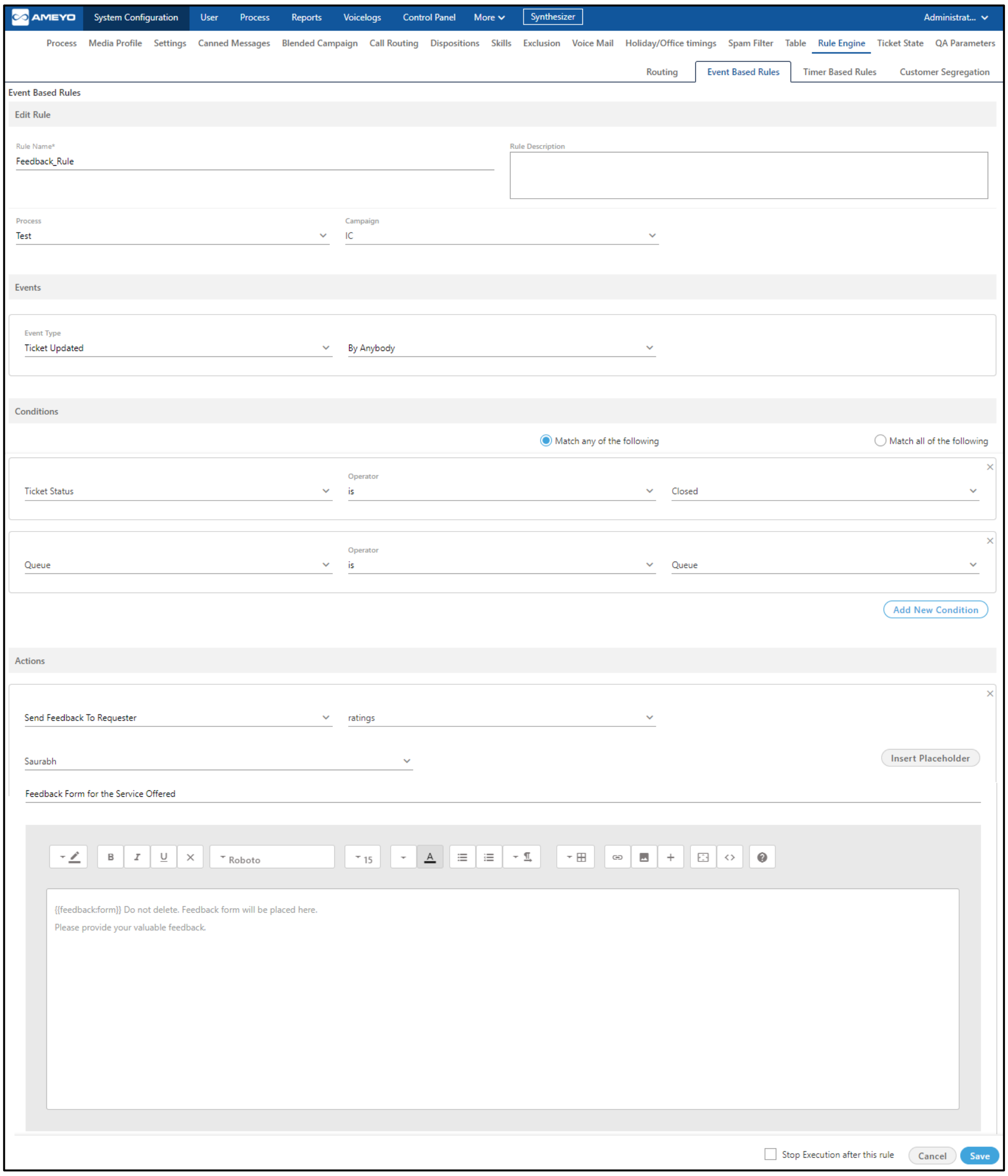


Figure: Event Based Rule for Feedback form

B. **Feedback Form Delivery through E-mail :** After all the configurations, the feedback form is ready to deliver to the customer. The feedback form will deliver to customer only after the provided condition in the above rule satisfies.

Once the provided condition satisfies, the feedback form through email will send to the customer on the customer's registered email.

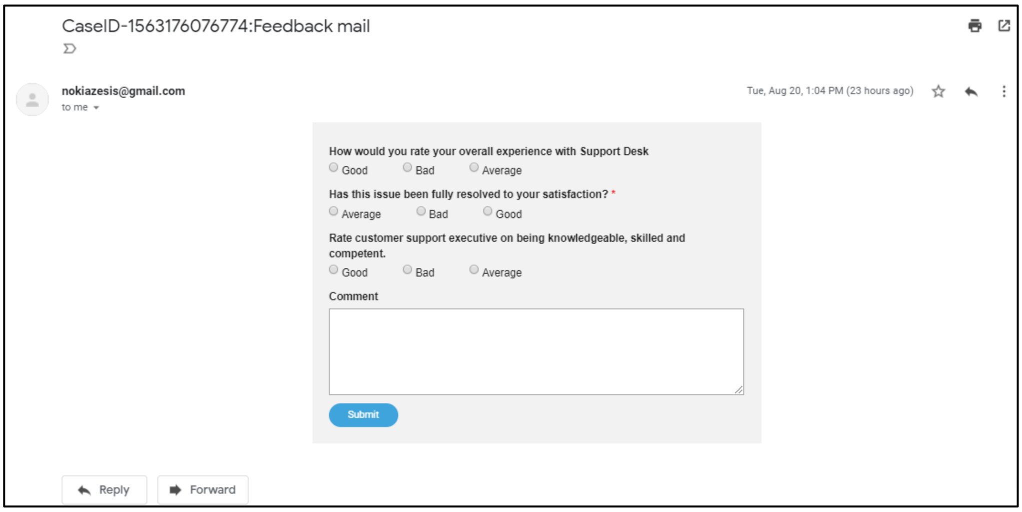


Figure: Sample Feedback Form delivered

13. 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.

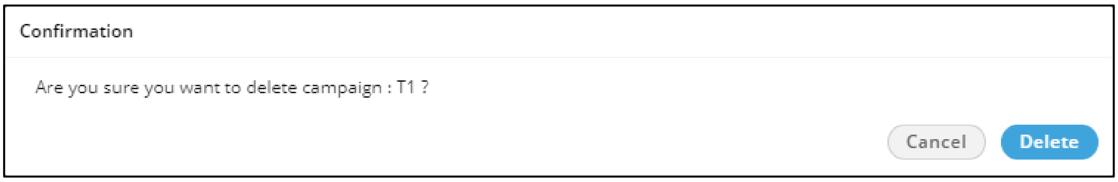


Figure: Deletion Confirmation Message

3. Click "Delete" to delete the campaign.

   Rather, you can click "No" to not delete the campaign.

14. Control Panel

It introduces the usage and administration of Control Panel. It manages the Ameyo through various methods.

14.1 Getting Started

14.1.1 Prerequisites

Control Panel should be installed along with the Ameyo AppServer. Please refer to the Installation Guide to install Ameyo AppServer and its packages on Ameyo OS, CentOS, or RHEL OS. After installation, entire Ameyo AppServer and Control Panel have to be on SSL for its working. Moreover, you have to enable Single Sign-On.

14.1.2 Install Control Panel

Execute the following command to install the Control Panel.

rpm -ivh <acp_build_name>.rpm

14.1.3 Upgrade Control Panel

If Control Panel is already installed, then execute the following command to upgrade the Control Panel.

rpm -Uvh <acp_build_name>.rpm

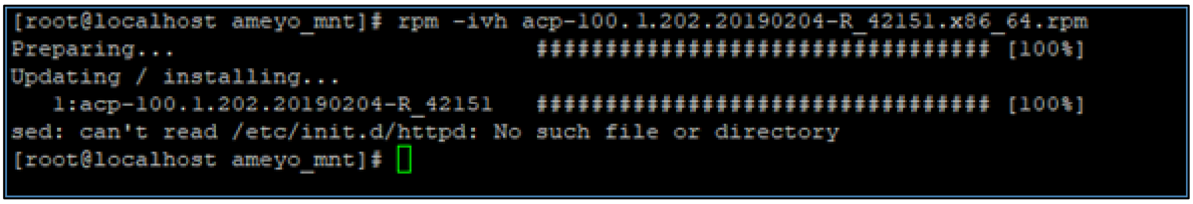


Figure: Installed the Control Panel

Two packages of Control Panel have been introduced in Ameyo 4.8 GA. One is for PHP 7.4, whereas another support PHP 5.6.40. If you are using old build of PHP and Control Panel, then refer to "4.7 GA Control Panel Manual".

If you are using the latest Control Panel, then proceed further to read its manual.

15. Configure SSL

15.1 Configure SSL for the entire Ameyo AppServer

Please refer to "Configure SSL" document to configure SSL for the entire Ameyo AppServer. Know more...

15.2 Configure SSL for Control Panel of Ameyo

After taking the entire Ameyo AppServer to SSL, you have to make the changes in the following files.

15.2.1 Configure config.php File

Execute the following command to edit config.php file.

vim /dacx/ameyo/acp/config.php

Change the data of the following lines.

$global_config['ameyoIP'] = '<Domain_Name_of_Server>';
$global_config['ameyoScheme'] = "https";
$global_config['ameyoPort'] = "<Port_number_of_Server>";
$global_config['dbconfig']['host'] = '<Domain_Name_of_Server>';
$global_config['dbconfig']['port'] = '';
$global_config['dbconfig']['database'] = '<Server_Database_Name>';
$global_config['dbconfig']['user'] = 'postgres';
$global_config['dbconfig']['password'] = '<Postgres_Password_if_any>';

```
$global_config['ameyoIP'] = 'tw48.ameyo.com';
$global_config['ameyoScheme'] = "https";
$global_config['ameyoPort'] = "8443";

$global_config['dbconfig']['host'] = 'tw48.ameyo.com';
$global_config['dbconfig']['port'] = '';
$global_config['dbconfig']['database'] = 'ameyodb';
$global_config['dbconfig']['user'] = 'postgres';
$global_config['dbconfig']['password'] = '';

?>
"/dacx/ameyo/acp/config.php" 125L, 4300C
```

Figure: config.php File

15.2.2 Configure dacx_httpd_2_4.conf File

Execute the following command to edit dacx_httpd_2_4.conf file,

vim /ameyo_mnt/dacx/ameyo/acp/dacx_httpd_2_4.conf

Change the data of the following lines.

SSLEngine off

DocumentRoot /dacx/ameyo/acp

SSLCertificateFile /<Path for keys folder>/<.crt Certificate File>

SSLCertificateKeyFile <Path for keys folder>/<.key Certificate File>

```
#EnableMMAP off
EnableSendfile on

<VirtualHost *:8080>
SSLEngine On
DocumentRoot /dacx/ameyo/acp
SSLCertificateFile /dacx/var/ameyo/dacxdata/keys/STAR_ameyo_com.crt
SSLCertificateKeyFile /dacx/var/ameyo/dacxdata/keys/STAR_ameyo_com.key
SSLCipherSuite EECDH+AESGCM:EDH+AESGCM:AES256+EECDH:AES256+EDH
SSLProtocol All -SSLv2 -SSLv3

Header always set X-Content-Type-Options nosniff
Header set X-XSS-Protection "1; mode=block"
Header always set Strict-Transport-Security "max-age=63072000; includeSubDomains"
Header edit Set-Cookie ^(.*)$ $1;HttpOnly;Secure
```

Figure: dacx_httpd_2_4.conf File

15.2.3 Configure ameyoconfig.props File

Run the following command to edit ameyoconfig.props file,

vim
/ameyo_mnt/dacx/var/ameyo/dacxdata/com.drishti.dacx.server.product/co
nf/web_server_ameyoconfig.props

Change these lines as displayed hereinbelow.

acpServerProtocol=https

acpServerIP=<Domain_Name_of_Server>

acpServerPort=8080

showAcpTab=true

```
acpServerProtocol=https
acpServerIP=techwriter.ameyo.com
acpServerPort=8080
showAcpTab=true
#tesing rpmbk
```

Figure: Ameyoconfig.props File

15.2.4 Restart the Service

After doing all the configurations, restart the Control Panel service. Execute the following commands.

ameyoctl service acp stop
ameyoctl service acp start

16. Login to Control Panel

Login at Ameyo as an Administrator. In the Administrator, a menu named "Control Panel" is visible in the top navigation bar. Click "Control Panel" to access the user interface of Control Panel. The default screen, which is the Voicelogs screen comes first.

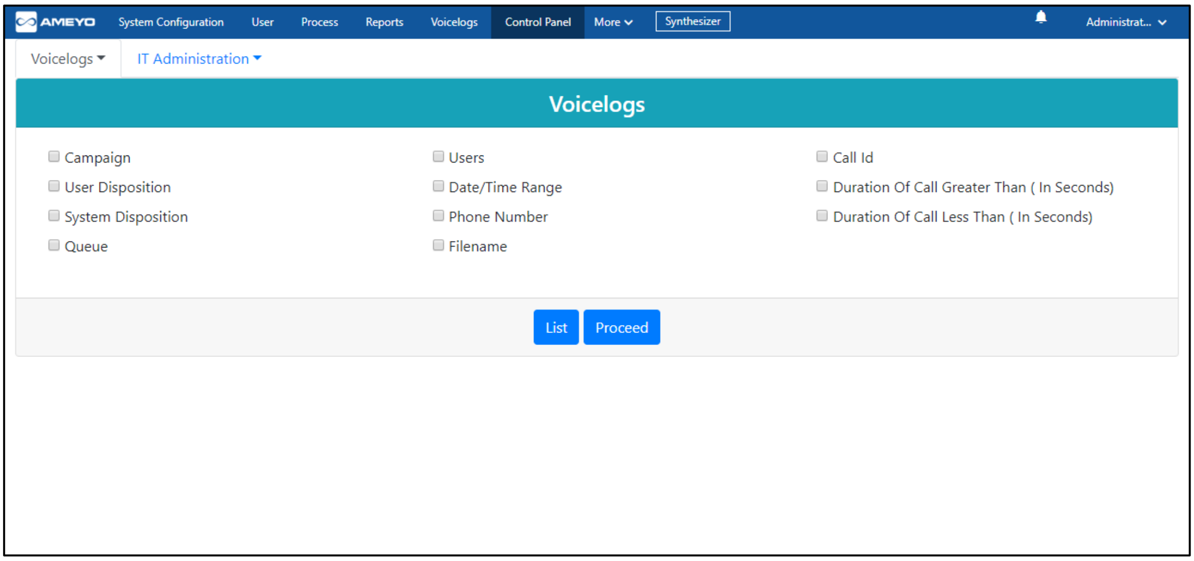


Figure: Voicelog Filters

When the Administrator logon to Control Panel successfully, the default page "Voicelog" is displayed.

17. Voicelogs

It is the first page of Control Panel. Here, you can apply the filters to listen to the voicelogs.

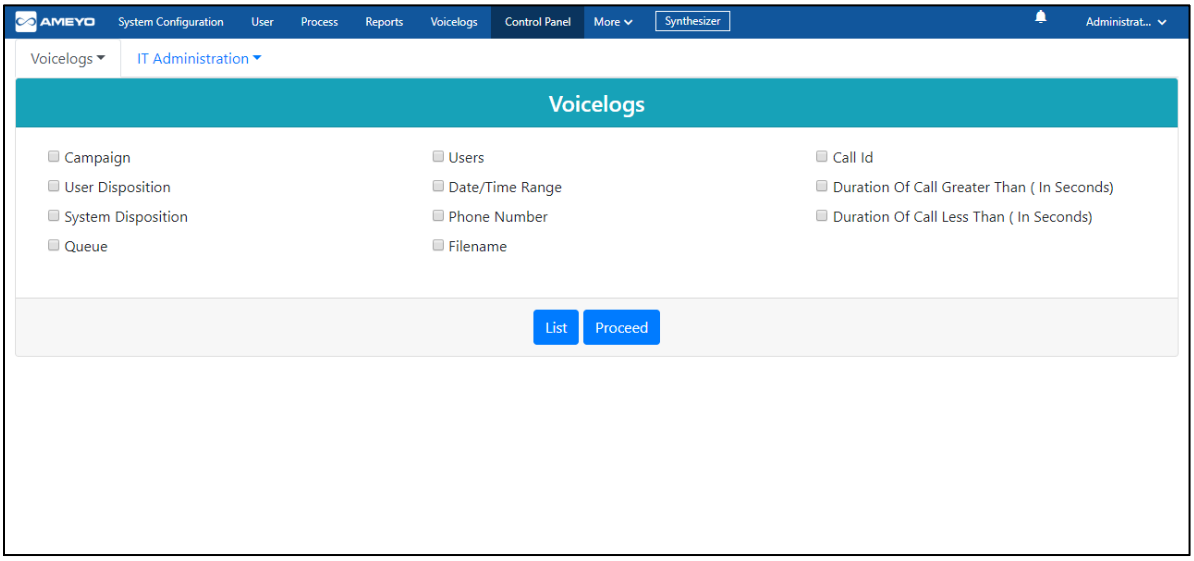


Figure: Voicelog Filters

Perform the following steps.

At this page, you have to select the filters and then view the voicelogs, which are listed hereinbelow. These filters help the user to view or filter according to the selection. You have to select any one of these filters.

1. **Date/Time (Mandatory):** : It filters the Voicelogs based on the Date/Time Range. Know more...
2. **Campaign:** It filters the Voicelogs based on the Campaign. Know more...
3. **User Disposition:** It filters the Voicelogs based on the User Dispositions. Know more...

4. **System Disposition:** It filters the Voicelogs based on the System Dispositions. Know more...
5. **Queue:** It filters the Voicelogs based on the Queues. Know more...
6. **Users:** It filters the Voicelogs based on the Users. Know more...
7. **Phone Number:** It filters the Voicelogs based on the Phone Number. Know more...
8. **Filename:** It filters the Voicelogs based on the Filenames. Know more...
9. **Call Id:** It filters the Voicelogs based on the Call Id. Know more...
10. **Comments:** It filters the Voicelogs based on the Comments. Know more...
11. **Ratings:** It filters the Voicelogs based on the Ratings. Know more...
12. **Duration of Call Greater than(in seconds):** It filters the Voicelogs based on the Call duration(greater than). Know more...
13. **Duration of Call Less than(in seconds):** It filters the Voicelogs based on the Call Duration (less than). Know more...

From here, the functionalities and steps are different for all of the above filters. Therefore, these filters and their configuration steps are explained in the following different sections.

17.1 Date or Time Filter

17.1.1 Date or Time Filter (Mandatory)

It allows the Administrator to filter the voicelogs that are recorded for the calls made on the selected date and time. It is a mandatory filter, which you have to select while selecting any of the above filters to filter voicelogs.

If the Administrator is proceeding to download the voicelog without selecting this filter, then the error message "Please select Date Range" is displayed on the page that appears after clicking "List" or "Proceed" button.

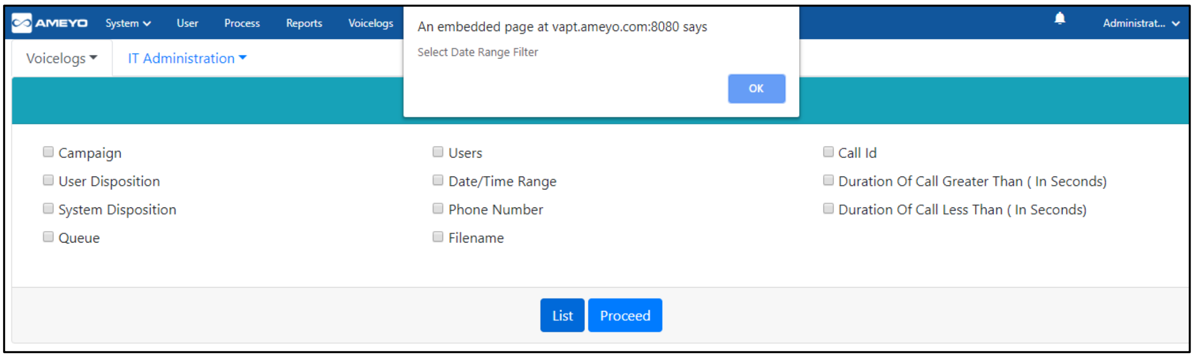


Figure: Date/Time Selection error

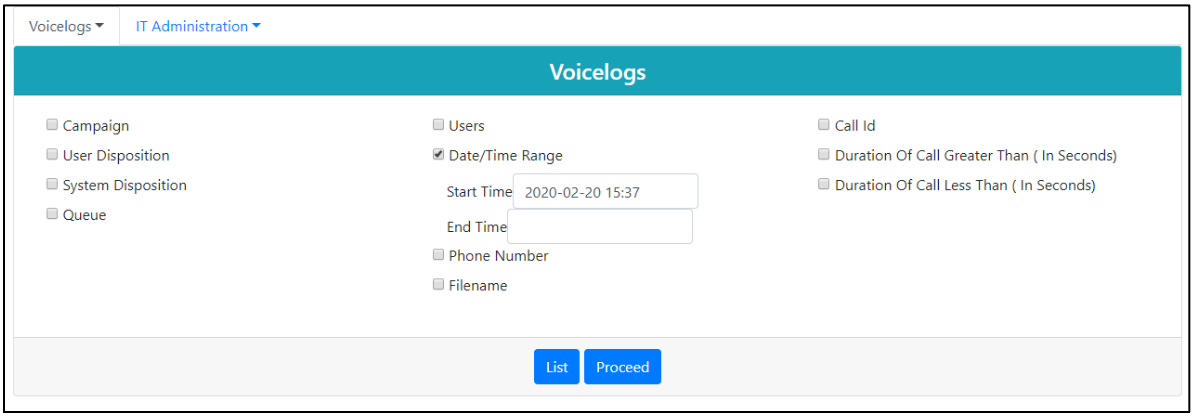


Figure: Date or Time Filter

Perform the following steps.

1. Select "Date/Time Range" filter.
2. Click the textbox for "Start Date". It shows a calendar.

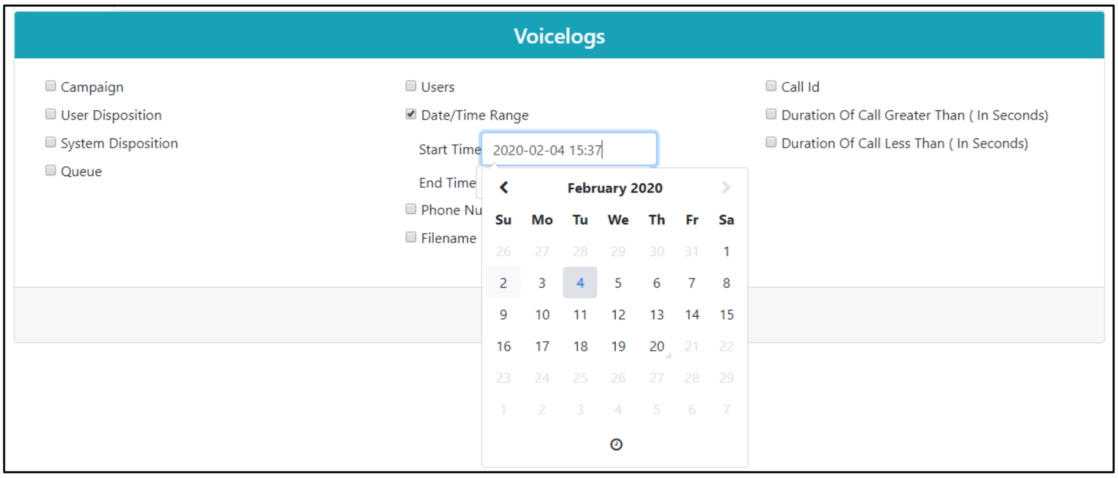


Figure: Date/Time Range Calendar Selection

3. Select the date in the calendar or type it manually in "DD-MM-YYYY" format.
4. (Optional) If you also want to filter the voicelogs as per the specific time range, you have to provide the values for both "Start Hours" and "Start Minutes". The values for "Start Hours" are from 0 to 23 and the values for "Start Minutes" are from 0 to 59.

   The default value for "Start Hours", "Start Minutes", "End Hours", and "End Minutes" is "0", which means 12:00 AM (00:00 AM). These default values will remain selected always.

5. Click the textbox for "End Date". It shows a calendar, which is quite similar to the calendar displayed for "State Date". The Administrator can either select the date in the calendar or type it manually in "DD-MM-YYYY" format.
6. (Optional) If you also want to filter the voicelogs as per the specific time range, you have to provide the values for both "End Hours" and "End Minutes". The values for "End Hours" are from 0 to 23 and the values for "End Minutes" are from 0 to 59.
7. After it, click any of the following buttons located at the bottom of the page.

A. **List Button:** On clicking the list button, it shows "Voicelog List" page. Know more...

B. **Proceed Button:** On clicking the proceed button, it shows "Voicelogs Download" page. Know more...

17.1.2 Voicelogs List Page

When you click "List" button after selecting a filter, the following "List" Page is displayed, it allows you to view all the voicelogs filtered according to the selected filter. You can to download, listen, and provide remarks on these voicelogs. It allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not.

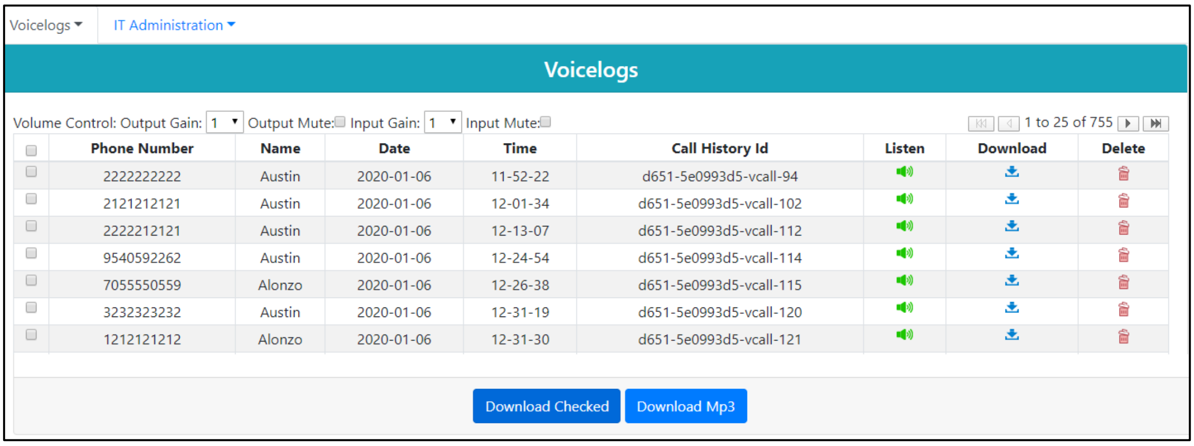


Figure: Voicelog List Page

Here, the Administrator can perform the following steps.

1. **Output Gain:** It is the amplification parameter of the customer's voice. Sometimes the customer's volume is low or hard to hear, to resolve such cases, and to amplify the voice; there are 1-10 amplification parameters. Select the parameter according to the audibility of the Voice.

2. **<u>Input Gain</u>:** It is the amplification parameter of the customer's voice. Sometimes the customer's volume is low or hard to hear, to resolve such cases, and to amplify the voice; there are 1-10 amplification parameters. Select the parameter according to the audibility of the Voice.

3. **<u>Input Mute</u>:** It allows the user to mute the agent's voice. This feature is helpful in cases when you do not want to listen to the voice of the agent.

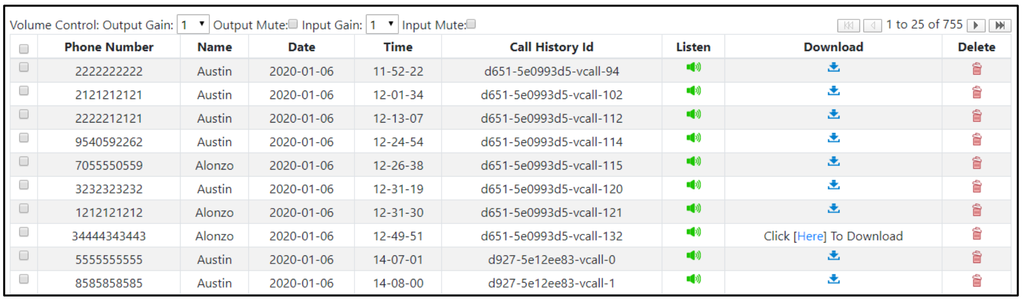
4. **<u>Output Mute</u>:** It allows the user to mute the customer's voice. This feature is helpful in cases when the administrator does not want to listen to the customer's voice.

5. **<u>Listing of Voicelogs</u>:** Voicelogs are listed in the tabular format.

6. **<u>Listen</u>:** It allows the Administrator, Supervisor, or the Quality Analyst to listen to the Agent's Conversation with Customer directly without downloading it. To listen to any Voicelog, click icon in front of the phone number or the agent' name.

7. **<u>Download</u>:** It allows the user to download only the particular voicelog. Perform the following steps.

   A. Click icon to download the voicelogs. It displays a new link at the same location, where the file is being mixed and prepared, and then a link is displayed to download the voicelog.


Volume Control: Output Gain: 1 Output Mute: Input Gain: 1 Input Mute: 1 to 25 of 755

	Phone Number	Name	Date	Time	Call History Id	Listen	Download	Delete
	2222222222	Austin	2020-01-06	11-52-22	d651-5e0993d5-vcall-94			
	2121212121	Austin	2020-01-06	12-01-34	d651-5e0993d5-vcall-102			
	2222212121	Austin	2020-01-06	12-13-07	d651-5e0993d5-vcall-112			
	9540592262	Austin	2020-01-06	12-24-54	d651-5e0993d5-vcall-114			
	7055550559	Alonzo	2020-01-06	12-26-38	d651-5e0993d5-vcall-115			
	3232323232	Austin	2020-01-06	12-31-19	d651-5e0993d5-vcall-120			
	1212121212	Alonzo	2020-01-06	12-31-30	d651-5e0993d5-vcall-121			
	34444343443	Alonzo	2020-01-06	12-49-51	d651-5e0993d5-vcall-132		Click [Here] To Download	
	5555555555	Austin	2020-01-06	14-07-01	d927-5e12ee83-vcall-0			
	8585858585	Austin	2020-01-06	14-08-00	d927-5e12ee83-vcall-1			

Figure: Download the file

B. Click "Here" link to download the voicelog file. "Download" option is based upon "Save As" functionality of the Web browser.

It is recommended to keep "Ask where to save each file before downloading" or similar option checked in your Web Browser so that you can specify the name and path to save the files.

C. **Case 1:** If "Ask where to save each file before downloading" option is not checked, the voicelog will be saved as ".wave" file with the default name at the default download location of the Web browser.

D. **Case 2:** If "Ask where to save each file before downloading" or other similar option is checked, then you have to perform the following steps to download the voicelog file.

Perform the following steps.

I. Click the link, which is marked in the green box, in above screenshot. It shows the following dialog box.

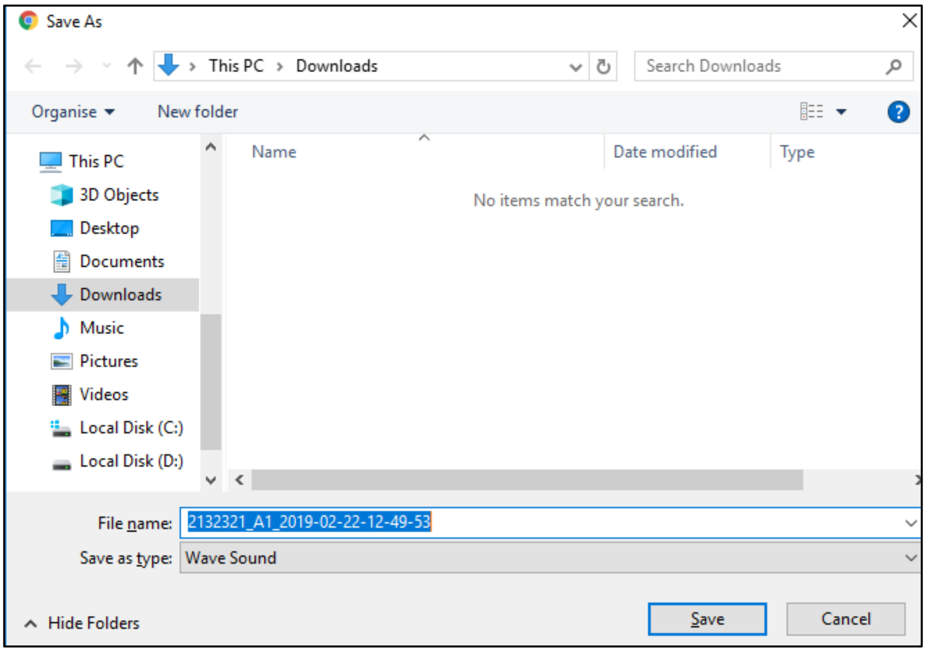


Figure: Dialog Box to download the file

II. Select the location where you want to save the file.

III. The default name of the file is the phone number of the customer, followed by the agent's name and the time stamp(YYYY-MM-DD-hr-mm-ss) when the call had been made.

IV. You can change filename in "File Name" textbox.

V. Click "Save" button.

8. **<u>Download Checked</u>:** It gives the privilege to the user to download only the selected files instead of downloading all. Perform the following steps.

   A. Check the boxes for the voicelogs that you want to download.

   B. Click "Download Checked"button . It shows a notification bar from where the process of input and output files mixing starts automatically, and the link to download the voicelog is displayed.

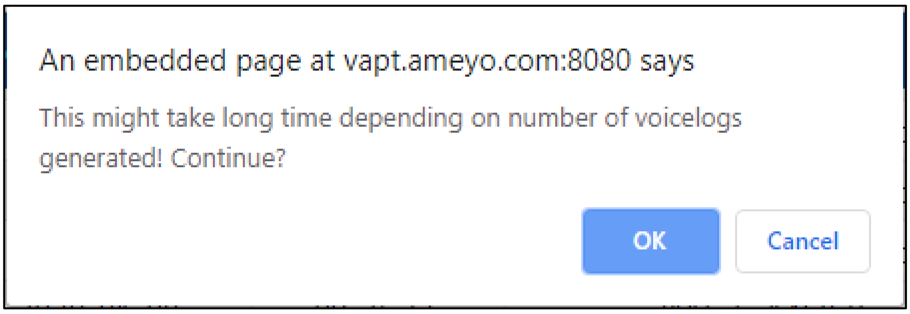


Figure: Download the file

C. Click "OK" button to download the file. "Download" option is based upon "Save As" functionality of the Web browser.

It is recommended to keep "Ask where to save each file before downloading" or similar option checked in your Web Browser so that you can specify the name and path to save the files.

D. **Case 1:** If "Ask where to save each file before downloading" option is not checked, the voicelog will be saved as ".wave" file with the default name at the default download location of the Web browser.

E. **Case 2:** If "Ask where to save each file before downloading" option is selected, then the following dialog box is displayed.

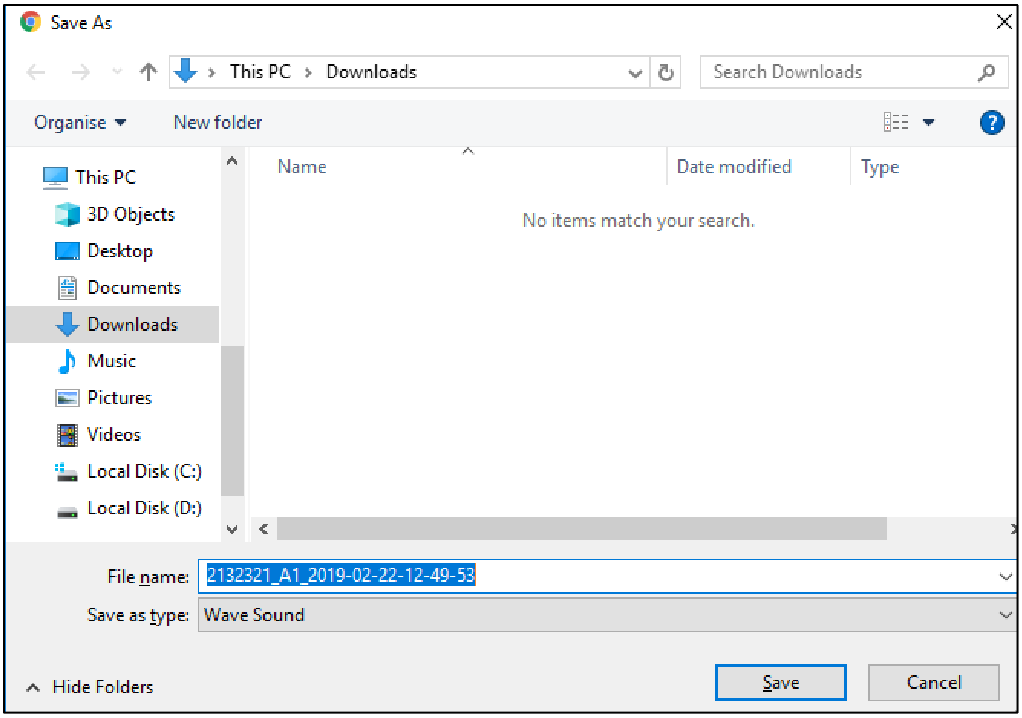


Figure: Dialog Box to download the file

Perform the following steps.

I. Select the location where you want to save the file.

II. The default name of the file is the phone number of the customer, followed by the agent's name and the time stamp(YYYY-MM-DD-hr-mm-ss) when the call had been made. You can change the filename in "**File Name**" textbox.

III. Click "Save" button.

9. **Call History ID:** It is the unique Call ID generated by Ameyo System for every call. It can be used to search for any particular voicelog for the call with this ID.

10. **Download MP3:** **:** This feature allows the user to download the voicelog in the MP3 format. Perform the following steps.

    A. Check the boxes for the voicelogs that you want to download.

    B. Click "Download MP3"button . It shows a notification, where the process of input and output files mixing starts automatically, and the link to download the voicelog is displayed.

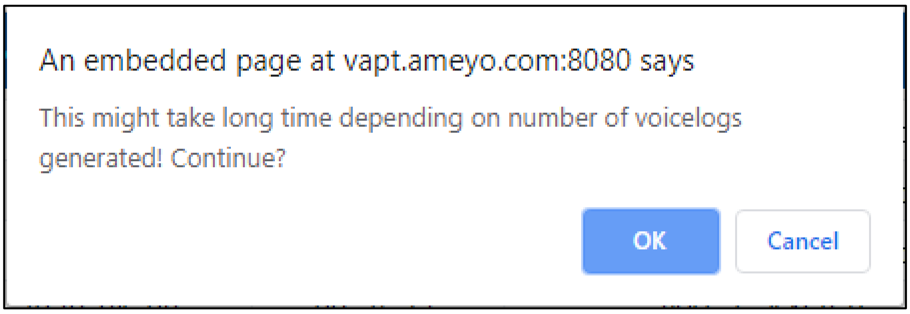


Figure: Page to download the file

C. Click "OK" button to download the file. "Download" option is based upon "Save As" functionality of the Web browser.

It is recommended to keep "Ask where to save each file before downloading" or similar option checked in your Web Browser so that you can specify the name and path to save the files.

D. **Case 1:** If "Ask where to save each file before downloading" option is not checked, the voicelog will be saved as ".wave" file with the default name at the default download location of the Web browser.

E. **Case 2:** If "Ask where to save each file before downloading" option is selected, then the following dialog box is displayed.

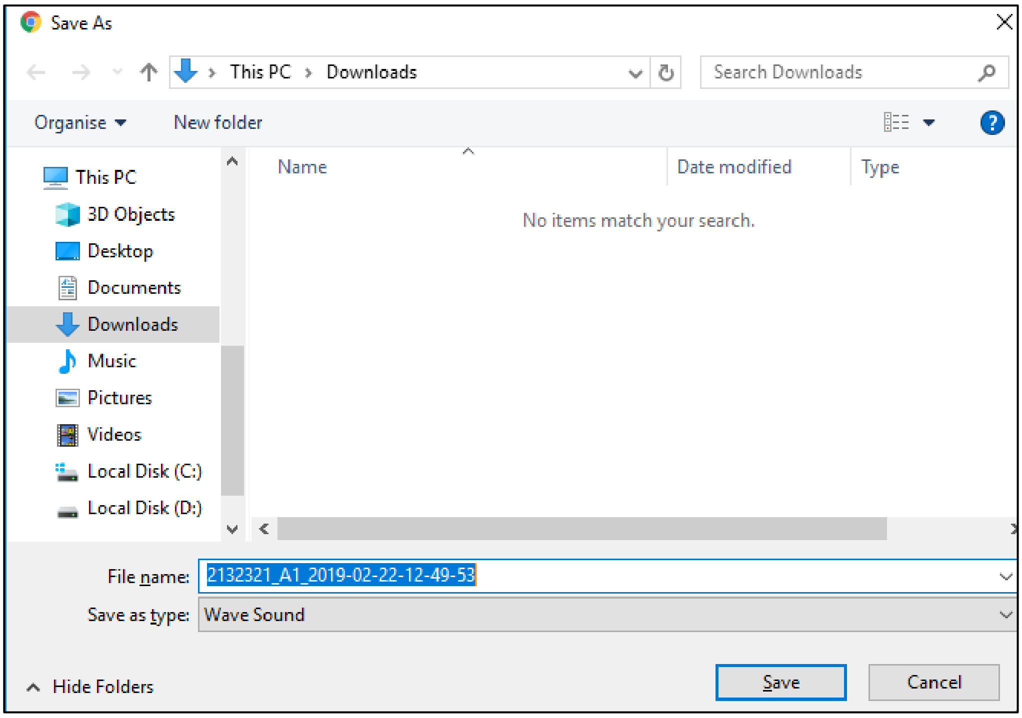


Figure: Dialog Box to download the file

Perform the following steps.

I. Select the location where you want to save the file.

II. The default name of the file is the phone number of the customer, followed by the agent's name and the time stamp(YYYY-MM-DD-hr-mm-ss) when the call had been made. You can change the filename in "**File Name**" textbox.

III. Click "Save" button.

17.1.3 Voicelogs Download Page

When you click "Proceed" button after selecting a filter, the following "List" Page is displayed.

Figure: Proceed Page

It allows you to download all voicelogs, delete them, or convert all voicelogs to MP3 in one click. It shows the total number of voicelog files. After clicking "Continue" button, all voicelogs starts appearing on the page.

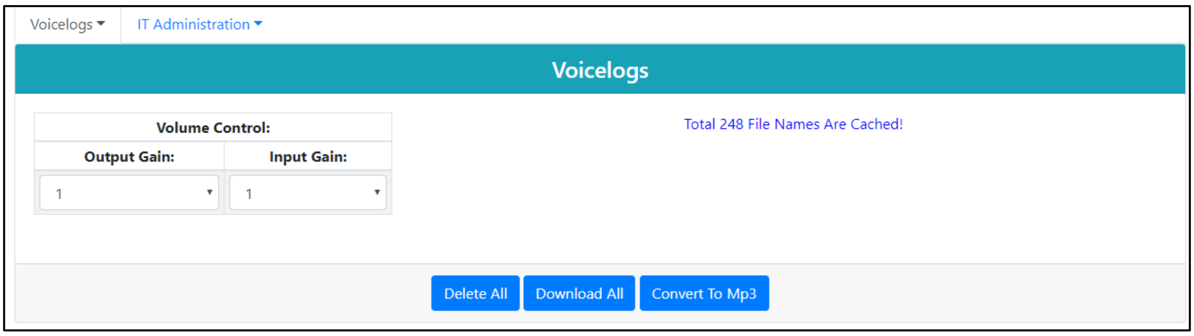


Figure: Voicelog Download

Administrator can perform the following steps.

1. **Output Gain:** It is the amplification parameter of the customer's voice. Sometimes the customer's volume is low or hard to hear, to resolve such cases, and to amplify the voice; there are 1-10 amplification parameters. Select the parameter according to the audibility of the Voice.
    - **Audibility of Voice:** Audibility used in the "Output Gain" is the parameter used in the Ameyo, means that the voice in the Voicelogs is ready to hear.
    - **Voice Amplification:** While on the conversation, over the channel communication like on the phone call, the volume of the one person is low or there is some noise in the communication as a result, another person is not able to hear the voice properly, In those cases there is a need to amplify the voice. In this method, amplification devices are used, which help to increase the volume of the person.
2. **Input Gain:** It is the amplification parameter of the voice of the Agent. Many times agent's volume is very low, or the agent's voice mixes with other agent's voice. To listen to the conversation clearly, there are 1-10 amplification parameters. Select the parameter according to the audibility of the Voice.
3. **Download All Button:** It allows you to download all the voicelogs at the same time. The downloaded files are in the same format as they are saved in the database. But these files are audible and playable with any regular audio player. Perform the following steps to download the voicelog file.

2.

A. Check the boxes for the voicelogs that you want to download.

B. Click "Download All"button . It shows a notification, after which the process of input and output files mixing starts automatically, and the link to download the voicelog is displayed.

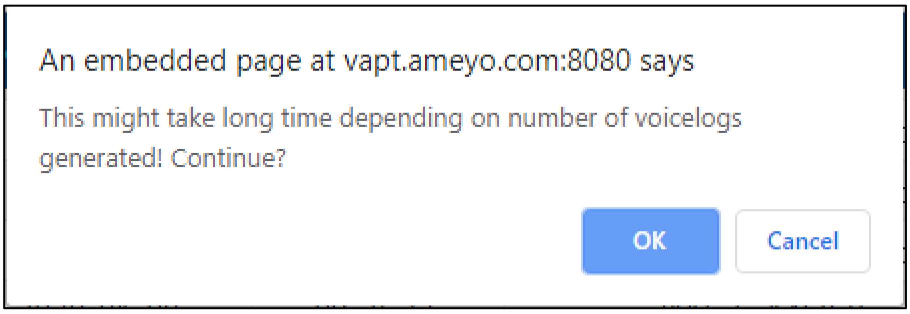


Figure: Page to download the file

C. Click "OK" button. "Download" option is based upon "Save As" functionality of the Web browser.

It is recommended to keep "Ask where to save each file before downloading" or similar option checked in your Web Browser so that you can specify the name and path to save the files.

D. **Case 1:** If "Ask where to save each file before downloading" option is not checked, the voicelog will be saved as ".wave" file with the default name at the default download location of the Web browser.

E. **Case 2:** If "Ask where to save each file before downloading" option is selected, then the following dialog box is displayed.

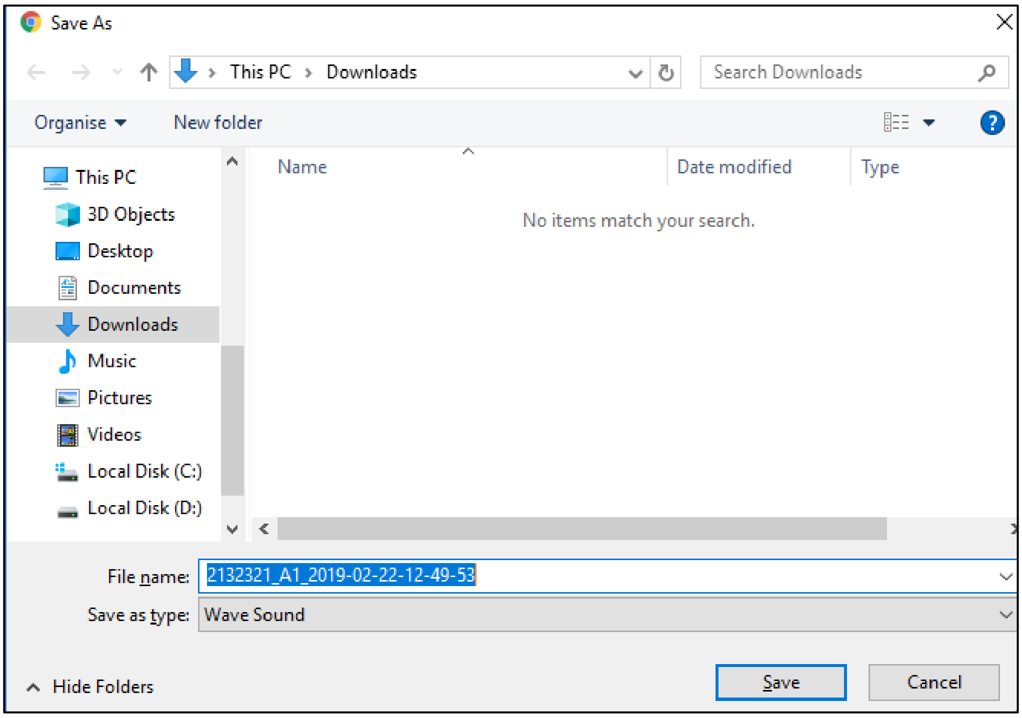


Figure: Dialog Box to download the file

Perform the following steps.

I. Select the location where you want to save the file.

II. The default name of the file is the phone number of the customer, followed by the agent's name and the time stamp(YYYY-MM-DD-hr-mm-ss) when the call had been made. You can change the filename in "**File Name**" textbox.

III. Click "Save" button.

3. **Convert to MP3:** This feature helps to convert voicelogs to the Mp3 file formats. The MP3 format is the universal format to listen to the voices. After clicking on this button, both the file conversion to MP3 and the download to the selected location starts automatically. Perform the following steps.

A. Click "convert to MP3" button to convert all the voicelog files to MP3 format. After clicking the button, a pop-up for the confirmation arises, to ask whether the voicelogs needs to convert or not in MP3 format.

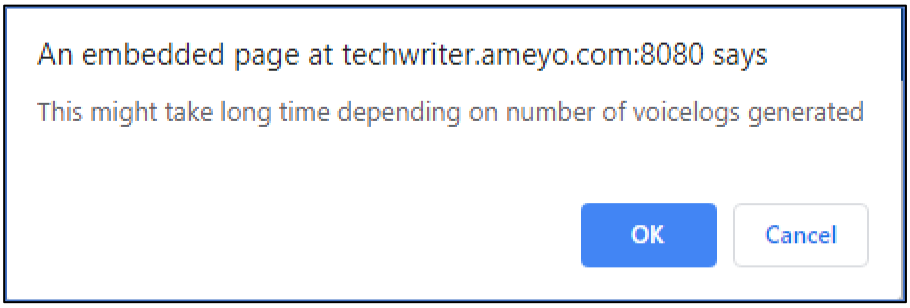


Figure: Confirmation Pop-up

B. Click "OK" to confirm. It shows the total number of records which are converted.

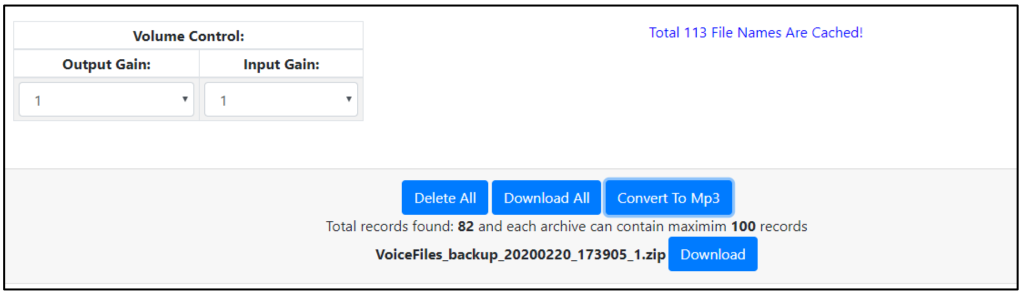


Figure: Page to download the file

C. Click "Download" button to download the converted files. "Download" option is based upon "Save As" functionality of the Web browser.

It is recommended to keep "Ask where to save each file before downloading" or similar option checked in your Web Browser so that you can specify the name and path to save the files.

D. **Case 1:** If "Ask where to save each file before downloading" option is not checked, the voicelog will be saved as ".wave" file with the default name at the default download location of the Web browser.

E. **Case 2:** If "Ask where to save each file before downloading" option is selected, then the following dialog box is displayed.

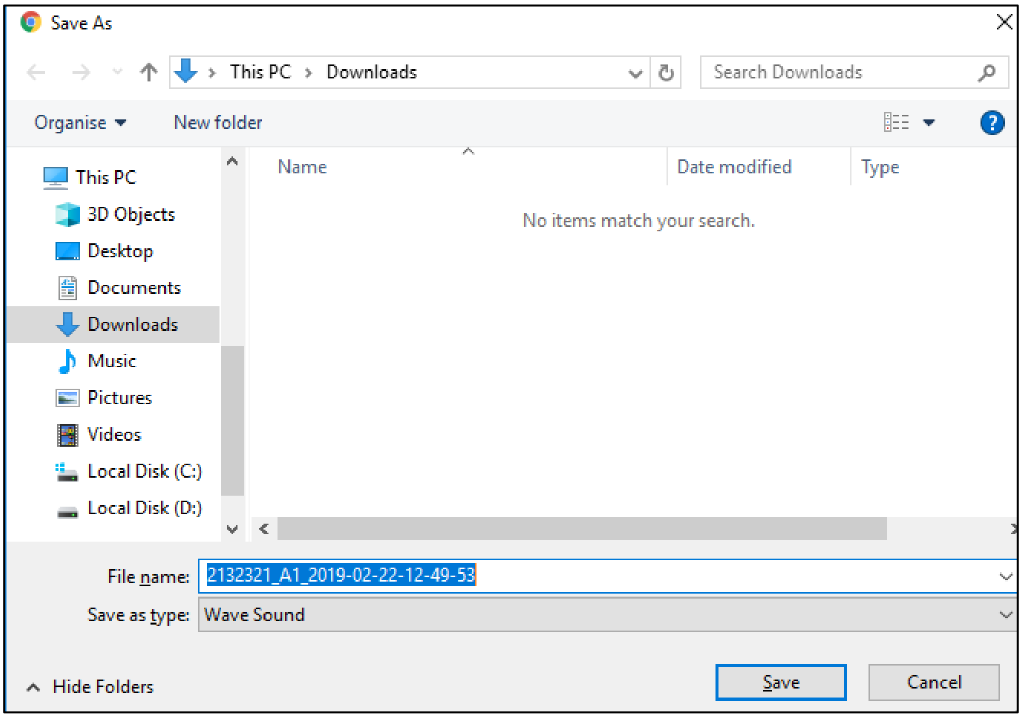


Figure: Dialog Box to download the file

Perform the following steps.

I. Select the location where you want to save the file.

II. The default name of the file is the phone number of the customer, followed by the agent's name and the time stamp(YYYY-MM-DD-hr-mm-ss) when the call had been made. You can change the filename in "**File Name**" textbox.

III. Click "Save" button.

4. **Delete All:** There may same rare of the rarest cases where you want to delete all the captured voicelogs.

There is no way to restore the voicelogs deleted using this method. So, use this option consciously.

Perform the following steps to delete all voicelogs.

A. Click "Delete All" button. A pop-up dialog comes up to ask for the confirmation of the deleting process.

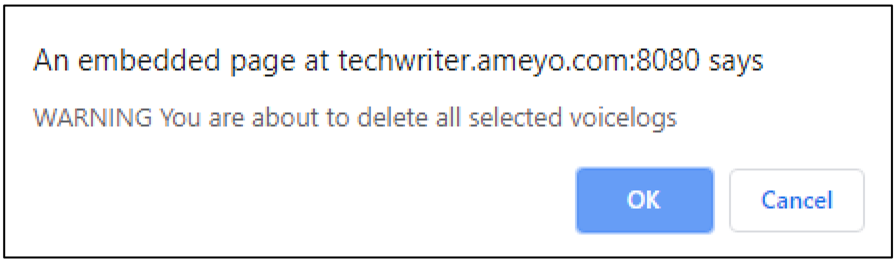


Figure: Delete All Confirmation

B. If you are okay to delete all the voicelogs, then click "OK" after reading the warning. Rather, click "Cancel."

C. After deleting all of the voicelogs, a message is displayed at the bottom of the page.

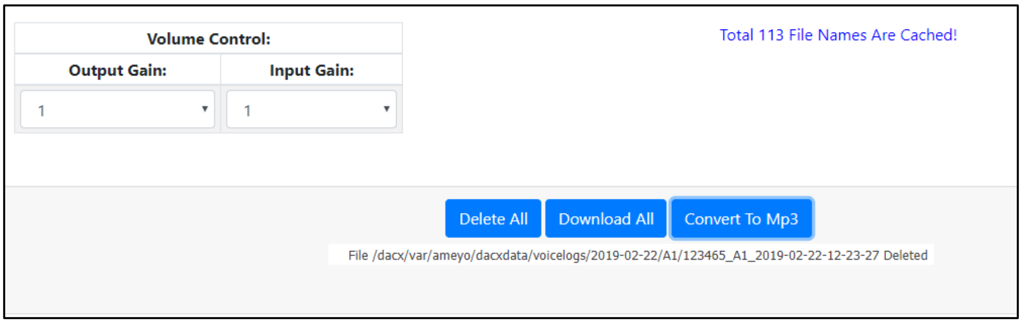


Figure: Voicelogs Deleted

17.2 Campaign Filter

Voicelogs can be filtered with the Campaign filter, which gives the privilege to the Administrator to view all the Voicelogs in a campaign. Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date and Time" to specify the period of which voicelogs you want to list with "Campaign" filter.
2. Check the "Campaign" box to list down the campaigns, in which the voicelogs have been generated.

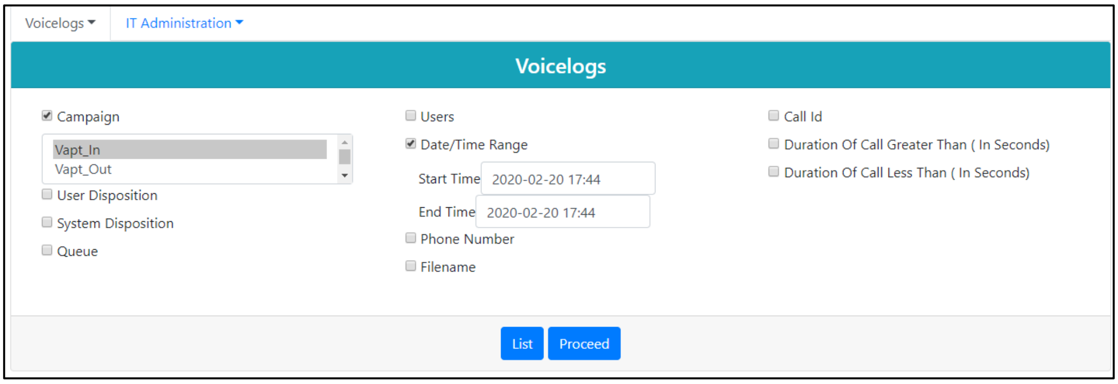


Figure: Campaign_Selection

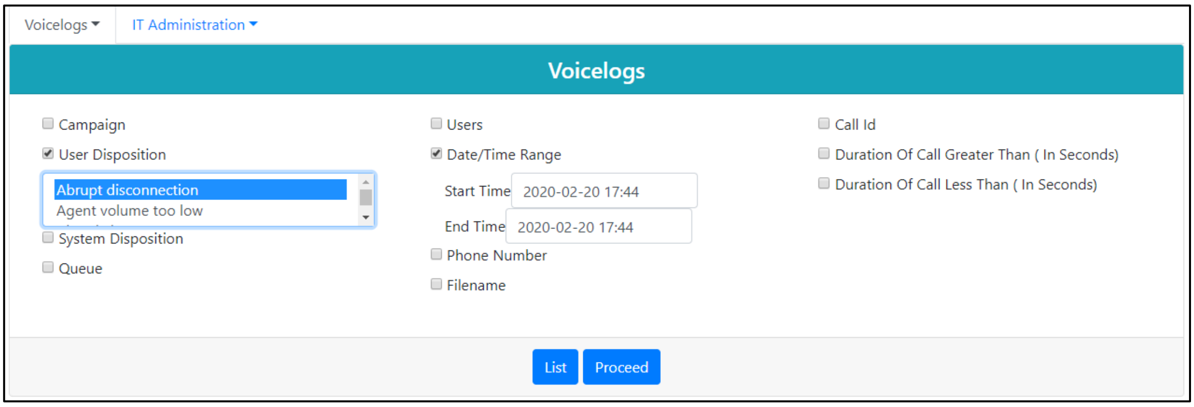
3. Use scrollbar to scroll through the list of campaigns. The administrator can select only one campaign at a time.
4. After making the selection, the administrator can click any of the following buttons.

   A. **List Button:** Click it to show "Voicelogs List" page that allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...

B. **Proceed Button:** Click it to show "Voicelogs Download" Page, which allows the user to download all voicelogs in default and MP3 formats, and delete them. Know more...

17.3 User Disposition Filter

Voicelogs can be filtered as per the User dispositions, which are provided by the agents while disposing of those calls for which the voicelogs have been generated.



User_Voicelogs

Figure: User Disposition

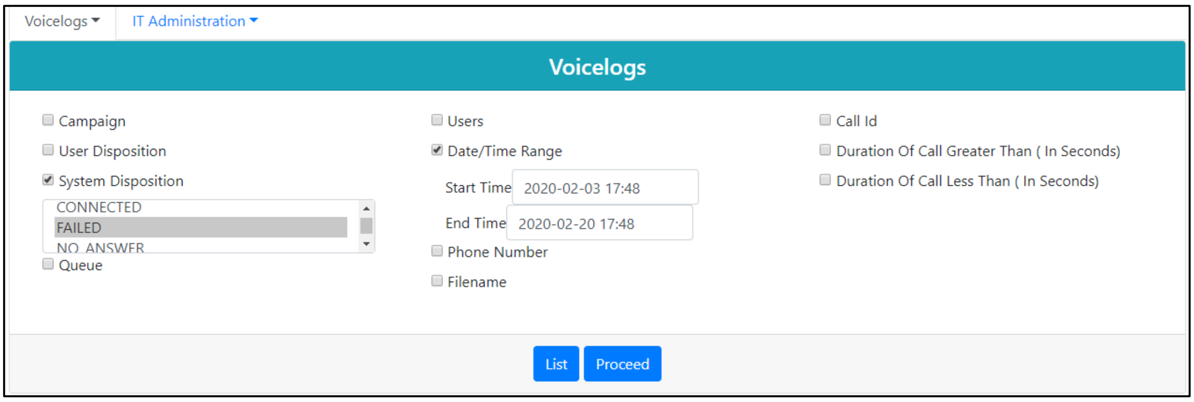
Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date and Time" to specify the period of which voicelogs you want to list with "User Disposition" filter.
2. Check "User Disposition" filter. It will list the user dispositions, for which the voicelogs are available.

3. You can use the scrollbar to scroll through the list of user dispositions. Select a user disposition to filter those voicelogs which are generated only for those calls that have been disposed of with this disposition.
4. After making the selection, the administrator can any of the following buttons.
   A. **List Button:** Click it to show "Voicelogs List" page that allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...
   B. **Proceed Button:** Click it to show "Voicelogs Download" Page, which allows the user to download all voicelogs in default and MP3 formats, and delete them. Know more...

17.4 System Disposition Filter

Voicelogs can be filtered as per the System dispositions, which are provided by the agents while disposing of those calls for which the voicelogs have been generated.



System_Voicelogs

Figure: System Disposition

Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date and Time" to specify the period of which voicelogs you want to list with "System Disposition" filter.
2. Check "System Disposition" filter. It will list the System dispositions, for which the voicelogs are available.
3. You can use the scrollbar to scroll through the list of System dispositions. Select a System disposition to filter those voicelogs which are generated only for those calls that have been disposed of with this disposition.
4. After making the selection, the administrator can any of the following buttons.
   A. **List Button:** Click it to show "Voicelogs List" page that allows the System to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...
   B. **Proceed Button:** Click it to show "Voicelogs Download" Page, which allows the System to download all voicelogs in default and MP3 formats, and delete them. Know more...

17.5 Queue Filter

It allows you to filter the voicelogs based upon the queues also. You have to select a campaign first to list the queues in that campaign. Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date and Time" to specify the period of which voicelogs you want to list with "Queue" filter.
2. Check the "Queue" box to list down the Queues, in which the voicelogs have been generated.

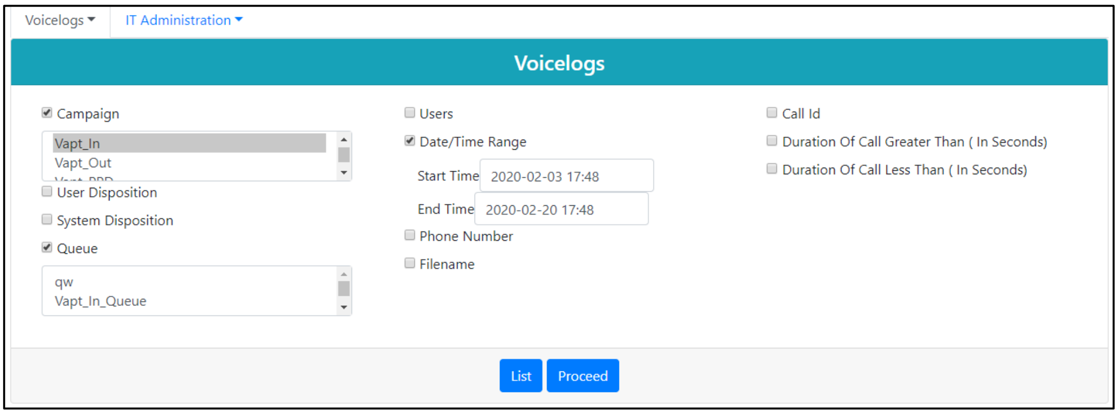


Figure: Queue Selection

3. Check "Campaign" box to enable the campaign filter. It shows the list of campaigns, in which the voicelogs have been generated.
4. Use the scroll bar to scroll through the list and select a campaign..
5. Check "Queue" box to enable the queue filter. It shows the list of queues available in the selected campaign.
6. Use the scroll bar to scroll through the list. Select a Queue, of which voicelogs, you want to access.
7. After making the selection, the administrator can click any of the following buttons.

   A. **List Button:** Click it to show "Voicelogs List" page that allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...

B. **Proceed Button:** Click it to show "Voicelogs Download" Page, which allows the user to download all voicelogs in default and MP3 formats, and delete them. Know more...

17.6 Users Filter

It allows the administrator to filter the voicelogs as per the user. It shows the voicelogs for those calls only, which are disposed of by the selected user.

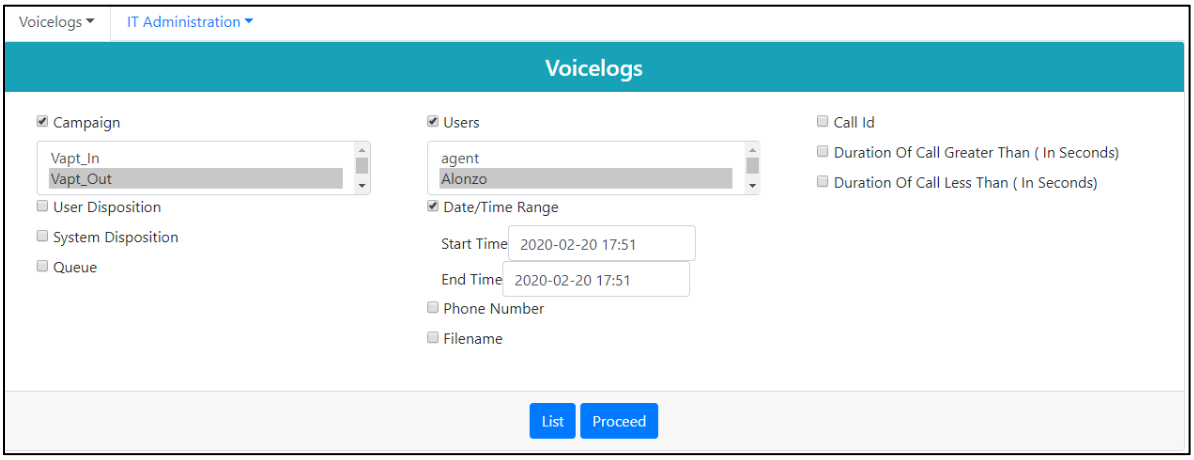


Figure: Users Selection

Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date and Time" to specify the period of which voicelogs you want to list with "Users" filter.
2. Enable the Campaign-level filter. It shows the of the available campaigns, in which voicelogs have been recorded.
3. Select a campaign.

4. Enable "Users" filter. It shows the list of the users staffed in the selected campaign.
5. You can use the scroll bar to scroll through the list. Select any user.
6. Use the scroll bar to scroll through the list. Select a Users, of which voicelogs, you want to access.
7. After making the selection, the administrator can click any of the following buttons.
    A. **List Button**: Click it to show "Voicelogs List" page that allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...
    B. **Proceed Button:** Click it to show "Voicelogs Download" Page, which allows the user to download all voicelogs in default and MP3 formats, and delete them. Know more...

17.7 Phone Number Filter

It allows the administrator to filter the voicelogs for those calls which have been made to the specified Phone Number of the customer.

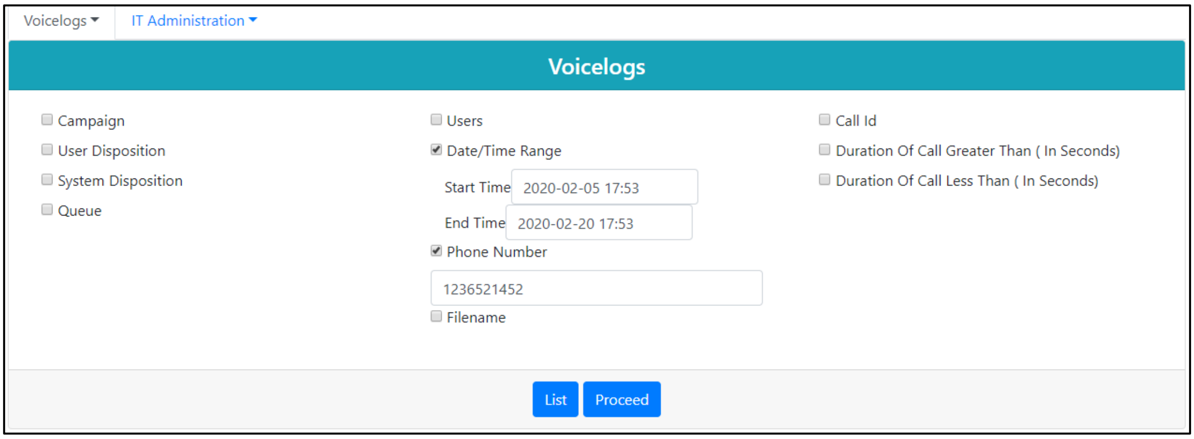


Figure: Phone Number Selection

Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date and Time" to specify the period of which voicelogs you want to list with "Phone Number" filter.
2. Check the "Phone Number" box to list down the Phone Numbers, in which the voicelogs have been generated.
3. Check "Phone Number" box to enable this filter.
4. Provide the phone number in the textbox.
5. After making the selection, the administrator can click any of the following buttons.

   A. **List Button:** Click it to show "Voicelogs List" page that allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...

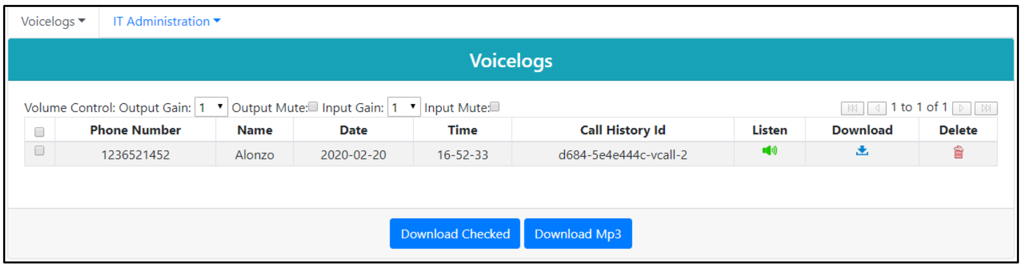
   

   Figure: Phone Number Voicelog

   B. **Proceed Button:** Click it to show "Voicelogs Download" Page, which allows the user to download all voicelogs in default and MP3 formats, and delete them. Know more...

17.8 Filename Filter

It is used to filter the voicelogs based upon the names of the voicelog files. It can be used when the filenames of the voicelogs are known.

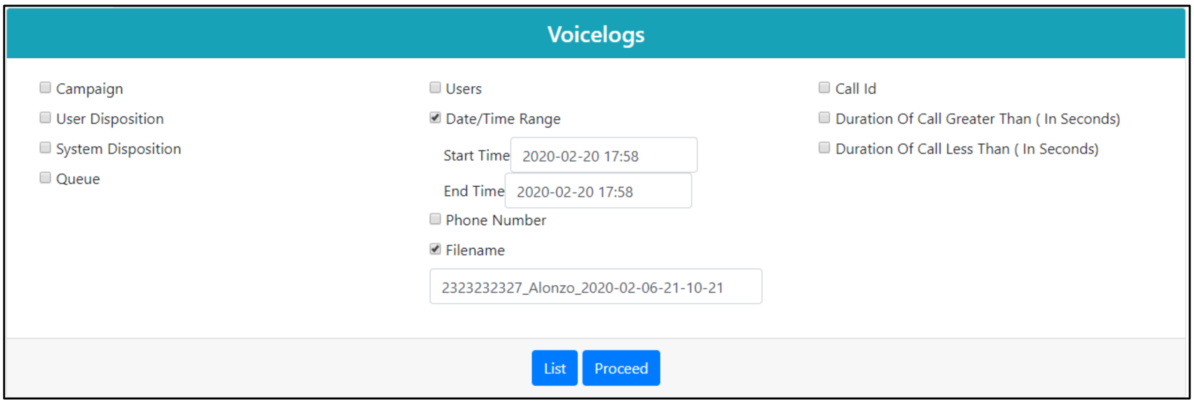


Figure: Filename Filter Selection

Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date and Time" to specify the period of which voicelogs you want to list with "Filename" filter.
2. Check "Filename" box to enable this filter.
3. Provide the filename in the textbox.
4. After making the selection, the administrator can click any of the following buttons.
   A. **List Button:** Click it to show "Voicelogs List" page that allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...

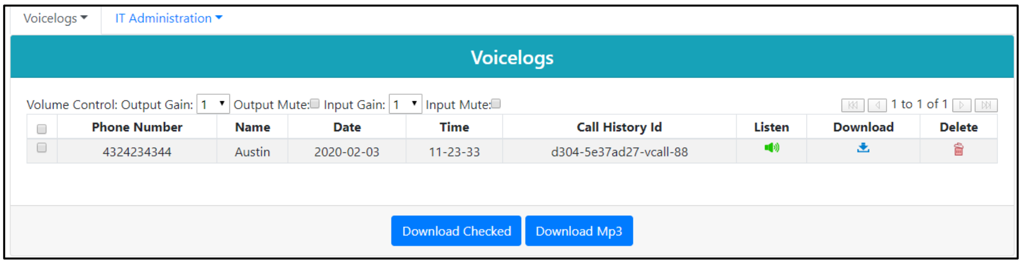


Figure: Filename Voicelog

B. **Proceed Button:** Click it to show "Voicelogs Download" Page, which allows the user to download all voicelogs in default and MP3 formats, and delete them. Know more...

17.9 CRT Object ID Filter

It is used to filter the voicelog for a particular of which CRT Object ID is provided. Ameyo System generates the unique CRT Object ID for every call automatically.

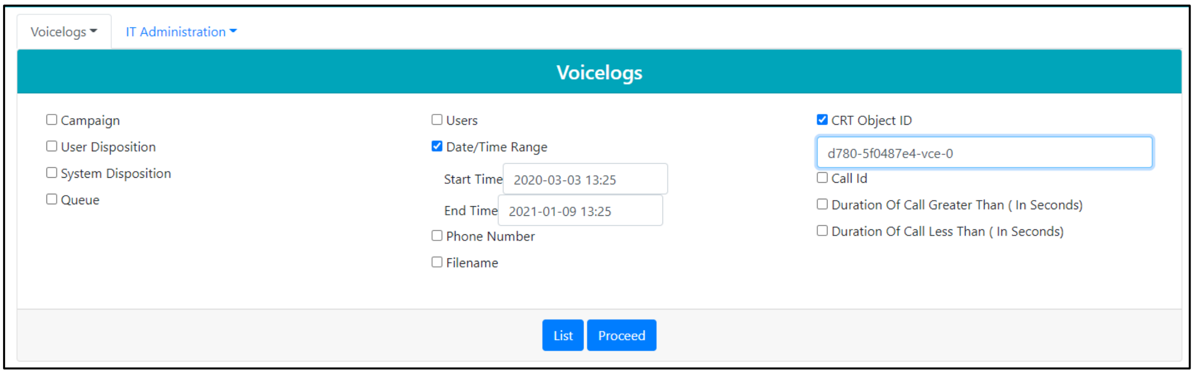


Figure: CRT Object Id Selection

Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date

and Time" to specify the period of which voicelogs you want to list with "CRT Object Id" filter.

2. Check "CRT Object id" box to enable this filter.
3. Select a campaign.
4. Enter the CRT Object ID in the text field.
5. After making the selection, the administrator can click any of the following buttons.
   A. **List Button:** Click it to show "Voicelogs List" page that allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...
   B. **Proceed Button:** Click it to show "Voicelogs Download" Page, which allows the user to download all voicelogs in default and MP3 formats, and delete them. Know more...

17.10Call Id Filter

It is used to filter the voicelog for a particular of which call ID is provided. Ameyo System generates the unique Call ID for every call automatically.

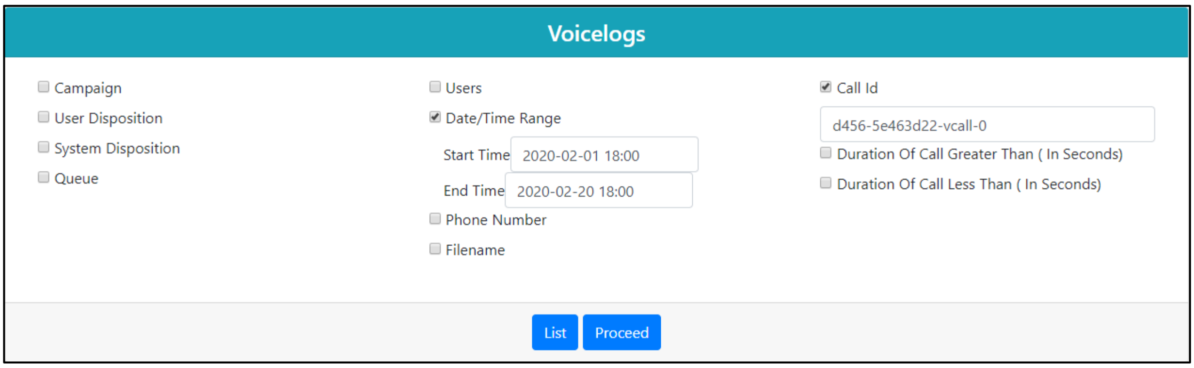


Figure: Call Id Selection

Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date and Time" to specify the period of which voicelogs you want to list with "Call Id" filter.
2. Check "Call id" box to enable this filter.
3. Select a campaign.
4. Enter the Call ID in the text field.
5. After making the selection, the administrator can click any of the following buttons.

    A. **List Button:** Click it to show "Voicelogs List" page that allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...

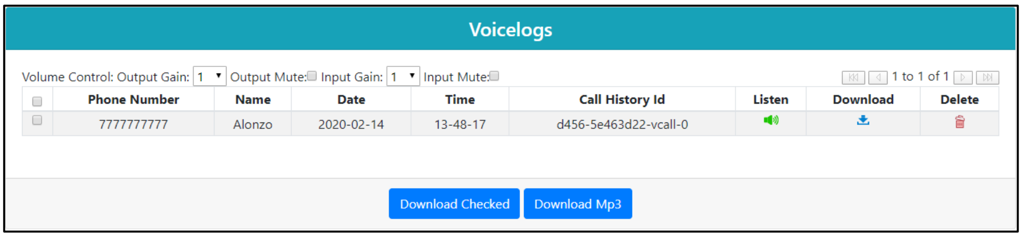
    

    Figure: Call Id Voicelog

    B. **Proceed Button:** Click it to show "Voicelogs Download" Page, which allows the user to download all voicelogs in default and MP3 formats, and delete them. Know more...

17.11 Duration of Call Greater than (in seconds) Filter

It is used to filter the voicelogs based upon the duration of those calls for which they have been generated.

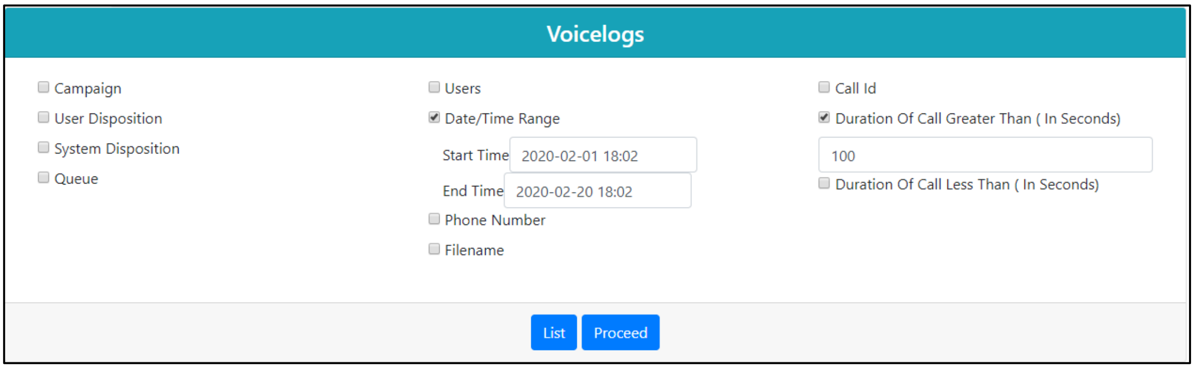


Figure: Call Id Selection

Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date and Time" to specify the period of which voicelogs you want to list with "Call Id" filter.
2. Check the box named "Duration of Call Greater than (in seconds)" to enable this filter.
3. Enter the value in seconds in the textbox to filter the voicelogs for those calls which have greater call duration than the provided value.
4. After making the selection, the administrator can click any of the following buttons.

   A. **List Button**: Click it to show "Voicelogs List" page that allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...

B. **<u>Proceed Button</u>:** Click it to show "Voicelogs Download" Page, which allows the user to download all voicelogs in default and MP3 formats, and delete them. Know more...

17.12Duration of Call Less than (in seconds) Filter

It is used to filter the voicelogs based upon the duration of those calls for which they are generated.

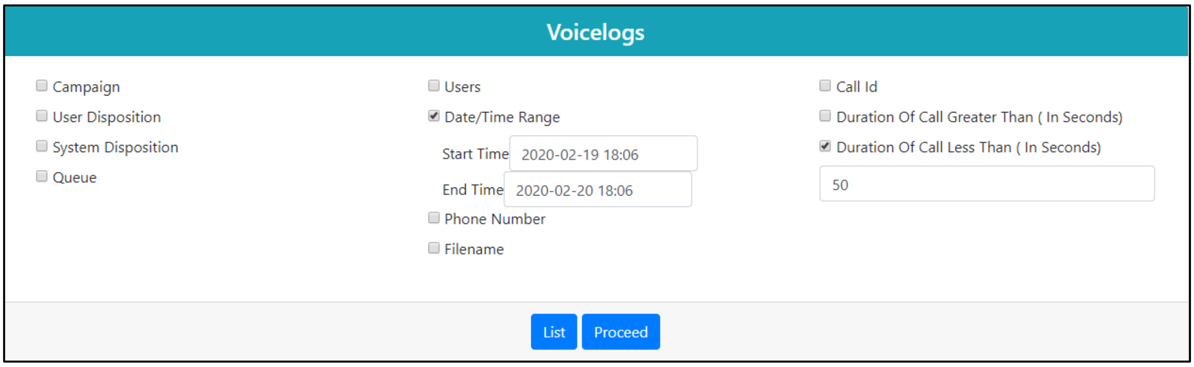


Figure: Call Id Selection

Perform the following steps.

1. (Mandatory) Check "Date/Time Range" box to enable the Date and Time file. Provide the values of "Start Date and Time" and "End Date and Time" to specify the period of which voicelogs you want to list with "Call Id" filter.
2. Check the box named "Duration of Call Less than (in seconds)" to enable this filter.
3. Enter the value in seconds in the textbox to filter the voicelogs for those calls which have greater call duration than the provided value.
4. After making the selection, the administrator can click any of the following buttons.

A. **List Button:** Click it to show "Voicelogs List" page that allows the user to listen to the voicelogs, download all or selected voicelogs in the default or MP3 format, provide remarks to the voicelogs, and view whether the voicelog is verified or not. Know more...

B. **Proceed Button:** Click it to show "Voicelogs Download" Page, which allows the user to download all voicelogs in default and MP3 formats, and delete them. Know more...

18. IT Administration

"IT Administration" Tab of Control Panel lets the Administrator control the essential features of the Ameyo. Click "IT Administrator" to access its page.

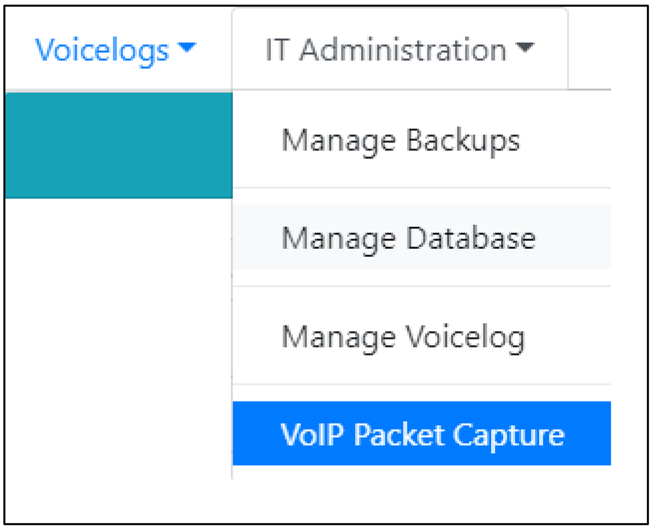


Figure: IT Administration Tab

It contains the following tabs. Click the links to know more about them.

1. Manage Database
2. Manage Backups
3. Manage Voicelogs
4. VoIP Packet Capturing

18.1 Manage Database

"Manage Database" Tab allows the Administrator to manage the database. Click "Manage Database" in "IT Administration" to access its page.

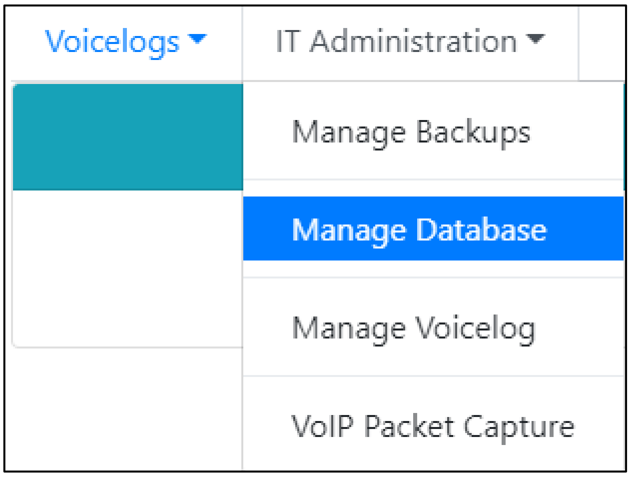


Figure: Manage Database

The following page opens on clicking to the Manage Database option.

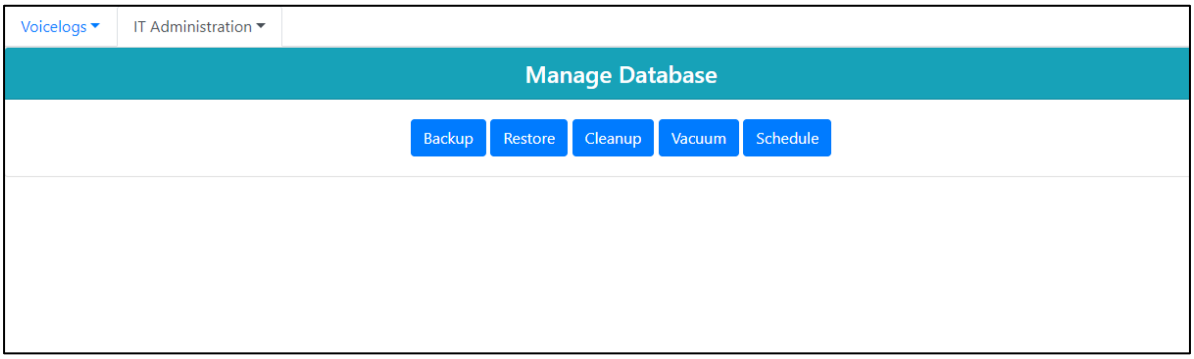


Figure: Manage Database Functions

Following tabs are displayed in this page. Click the links to know more about them.

1. Backup
2. Restore
3. Cleanup

4. Vacuum
5. Schedule

18.1.1 Backup

18.1.1.1 Backup

Here, the Administrator can take the backup of the database manually by performing the following steps.

1. Click "Backup" tab. It shows the following wizard in the browser.

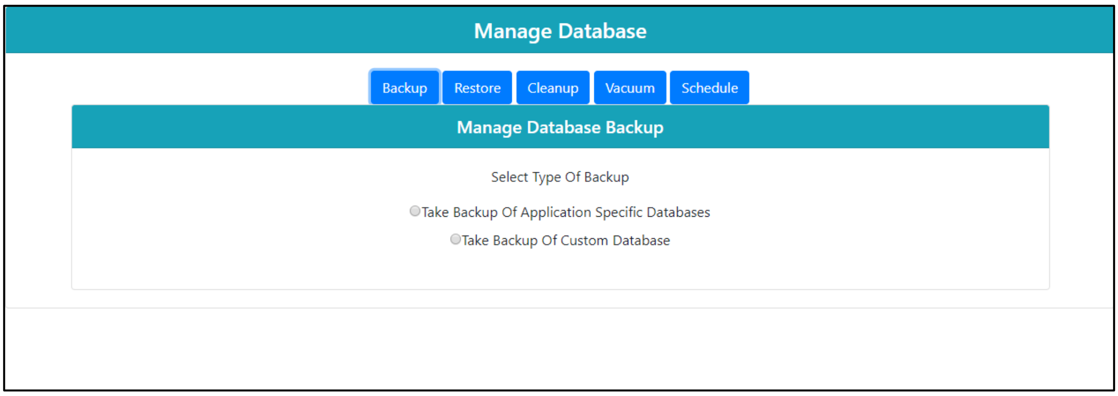


Figure: Backup Option in Manage Database Tab

2. You have to select any of the following options.
   A. **Take Application Specific Backup:** It allows you to take the application specific backup. Know more...
   B. **Take Backup of Custom Database**It allows you to take the backup of any particular database. Know more...

18.1.1.2 Take Backup of Application Specific Databases

It allows the Administrator to backup any application-specific database. Here, the databases related to the selected application appear only. For example, the databases related to Ameyo AppServer and Ameyo Archiving and Reporting Tool are displayed here. Perform the following steps.

1. Click "Backup" tab in "Manage Database." It shows the following wizard.

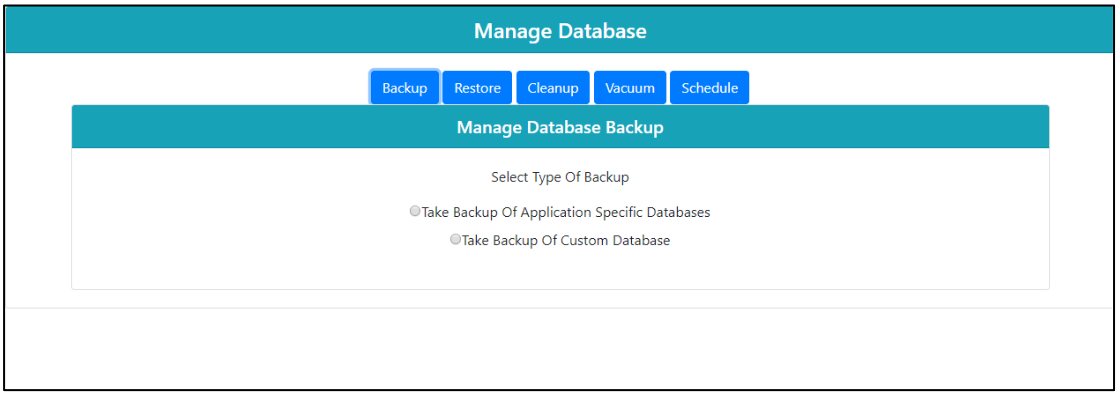


Figure: Backup Tab

2. Click "Take Backup of Application Specific Databases" option. It shows the following screen.

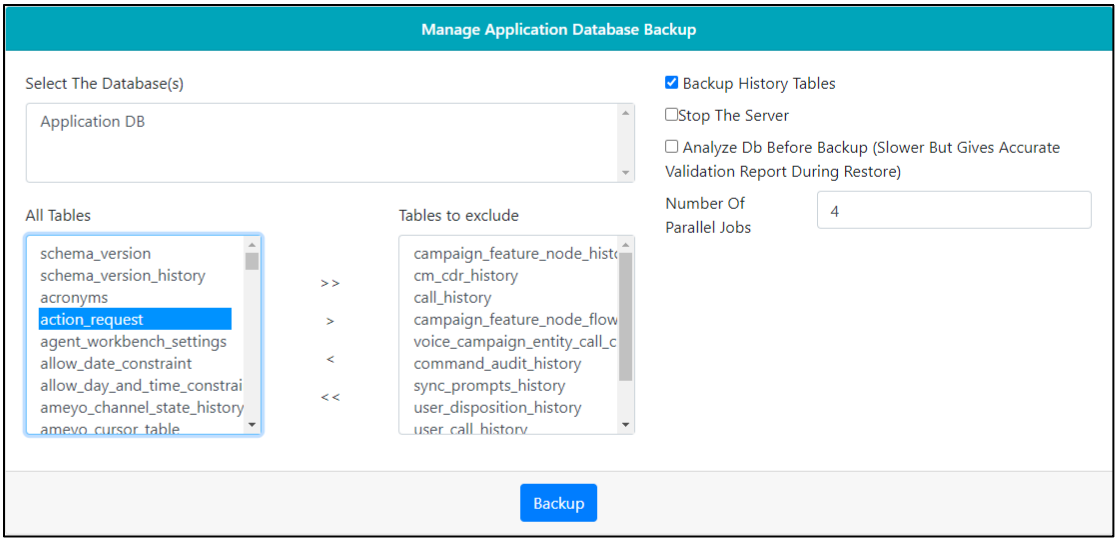


Figure: Application Specific Backup

3. Select the application name for which you have to take the backup.

4. The administrator has the option to select the specific database table names for which the backup needs to be taken. The user can exclude the tables which are not much useful for the backup. Select the tables from "All tables" list and click **>** to exclude that table. The user can select the table from the excluded list of tables and click **<** to select that table to be included in the backup process.

   To exclude all listed tables, then click >> option; else click << to include all tables from the excluded list.

5. **(Optional) Backup History Table:** Check "Backup History Tables" to enable the option for taking the backup of the History tables also. The History tables store the history of all contents such as Call History, User Login History, and others. However, in some cases, these tables are not that important for the users, and thus, the user can also skip this step.

6. **(Optional) Analyze Database Backup:** Check the box titled "Analyze DB before Backup (Slower but gives accurate validation report during restore)" to analyze database while taking the backup. At the time of backup, it runs the database error check resolver to check for the errors during the backup process. There are possibilities of having the errors at the time of backup, which can be there due to any reason. For example, during the backup process, one of two related tables get backup with the old data, but the second table stores the updated data. This is because the server is still working on updating the data of both related tables and may take more time to complete, but the backup process has been started already.

7. **(Optional, but Recommended) Stop Server:** Check "Stop the Server" box to stop the Server while performing the Cleanup task. It is an optional step but recommended. Enabling this function stops

the server until the "Cleanup" process is completed so that any discrepancy can be avoided.

8. **Number of Parallel Jobs:** Provide the number of jobs which can be executed simultaneously. Parallel jobs means that the total number of jobs that can be executed at any instant of time.
9. Click "Backup" button on the bottom to backup the selected database. It can take a few minutes to complete the backup process depends upon the size of the database.

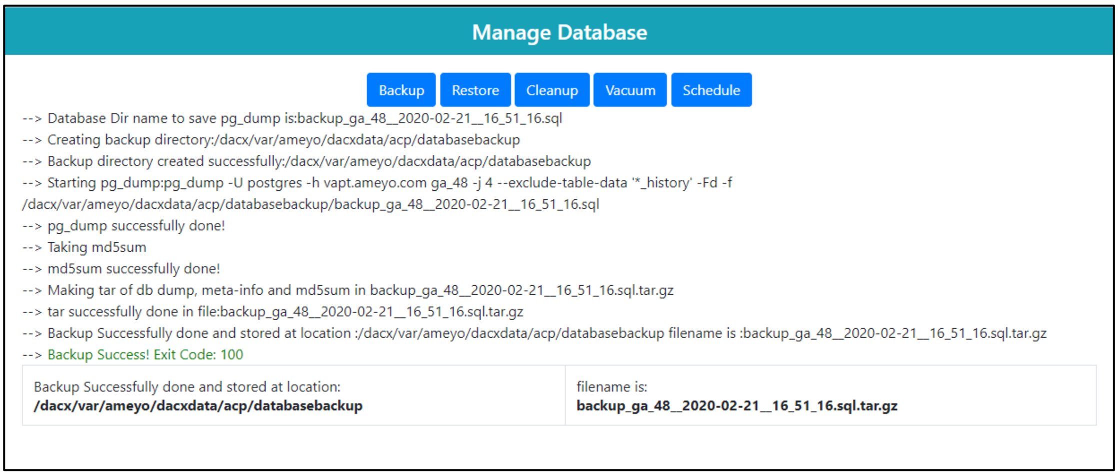


Figure: Backup Process

Once done, it shows the status of the backup whether it is done or not. Also it contains the path at which the backup file is kept on the server with its file name.

10. Click "Download" to download the backup file. Download" option is based upon "Save As" functionality of the Web browser.

It is recommended to keep "Ask where to save each file before downloading" or similar option checked in your Web Browser so that you can specify the name and path to save the files.

A. **Case 1:** If "Ask where to save each file before downloading" option is not checked, the voicelog will be saved as ".wave" file with the default name at the default download location of the Web browser.

B. **Case 2:** If "Ask where to save each file before downloading" or other similar option is checked, then you have to perform the following steps to download the voicelog file.

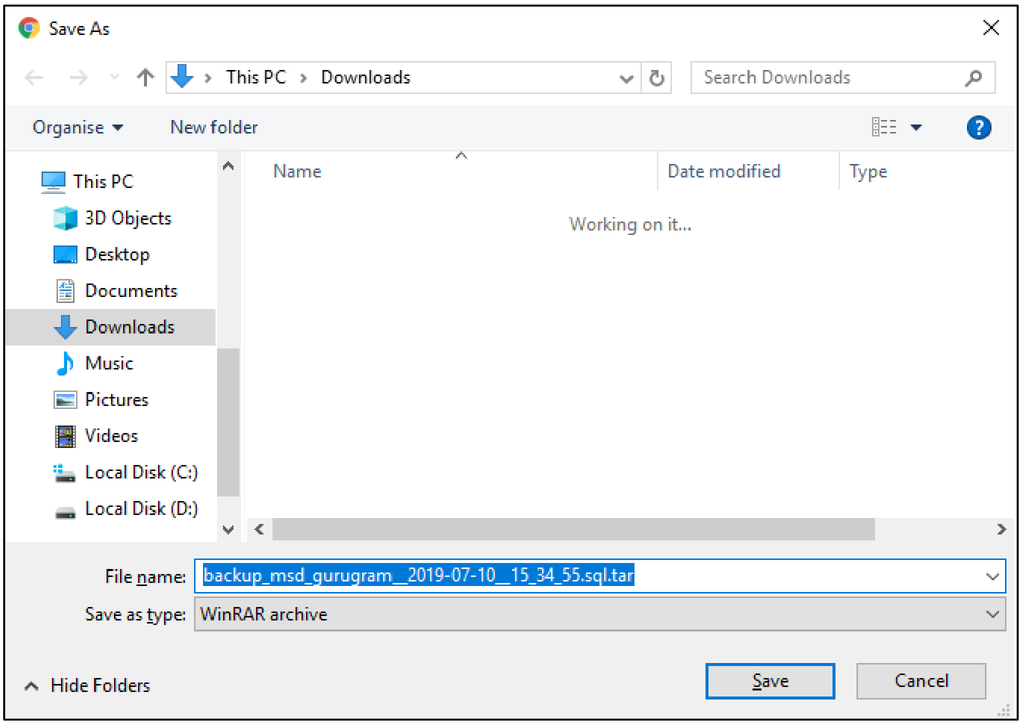


Figure: Dialog Box to download the file

I. Select the location where you want to save the file.

II. The default name of the file is the name of the database (of which backup is taken) followed by the present time stamp(YYYY-MM-DD-hr-mm-ss).

III. You can change filename in "File Name" textbox.

IV. Click "Save" button.

18.1.1.3 Take Backup of Custom Database

This option helps the Administrator to take the backup of any specific database. Perform the following steps.

1. Click "Backup" tab in "Manage Database." It shows the following wizard in the Web browser.

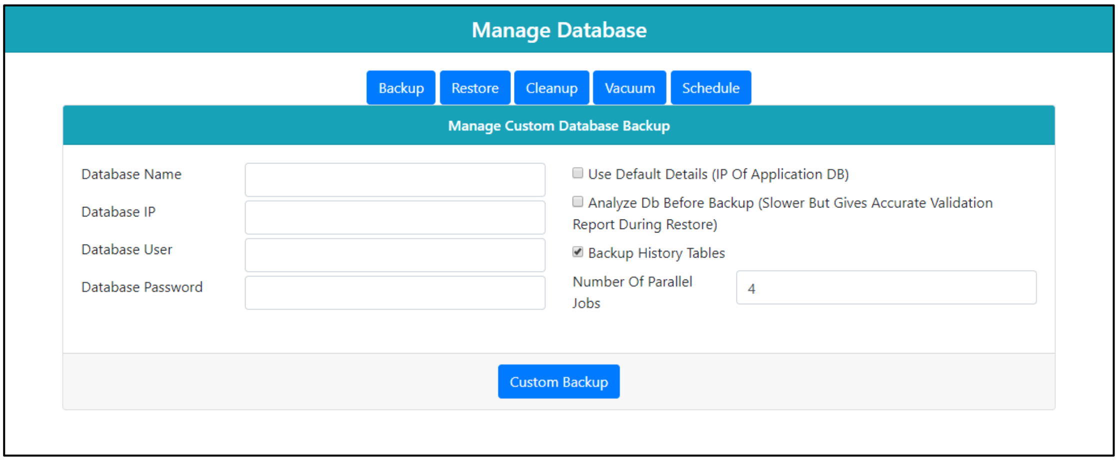


Figure: Custom Database Backup

2. Keep "Take Backup of Custom Database" box checked.
3. Enter the name of the Database in the Database Name column.
4. **(Optional) Use Default Details (IP of Application DB):** If the target database (of which backup has to be taken) is on the same server that hosts the Ameyo application database, then enable this option. It lets the Ameyo authenticate the database automatically and saves the time by not asking the credentials to verify the server.

   You can either select "Use Default Details)" option or enter the details of the target server where the target database is stored.

5. **(Optional) Analyze Database Backup:** Check the box titled "Analyze DB before Backup (Slower but gives accurate validation report during restore)" to analyze the database while taking the backup. At the time of backup, it runs the database error check resolver to check for the errors during the backup process.

There are possibilities of having the errors due to any reason at the time of backup. For example, during the backup process, one of two related tables get backup with the old data, but the second table stores the updated data. This is because the server is still working to update the data of both related tables and need more time to complete, but the backup process has already been started.

6. **(Optional) Backup History Table:** Check "Backup History Tables" to enable the option for taking the backup of the History tables. The History tables store the history of all contents like Call History, User Login History, and others. However, in some cases, these tables are not so important for the users, and thus, a user can also skip this step.
7. If the target database is not stored on the server that hosts the Ameyo application database, then you have to provide the following inputs.
   A. **Database IP:** Provide the IP Address of the server that hosts the target database.
   B. **Database User:** Provide the name of the user who has required access privileges to backup the target database.
   C. **Database Password:** Provide the password of the selected user to authenticate the logon on the server.
8. After entering all the details, the backup process starts and it may take some time depending upon the size of the database. After the completion of the backup process, the following screen comes up.

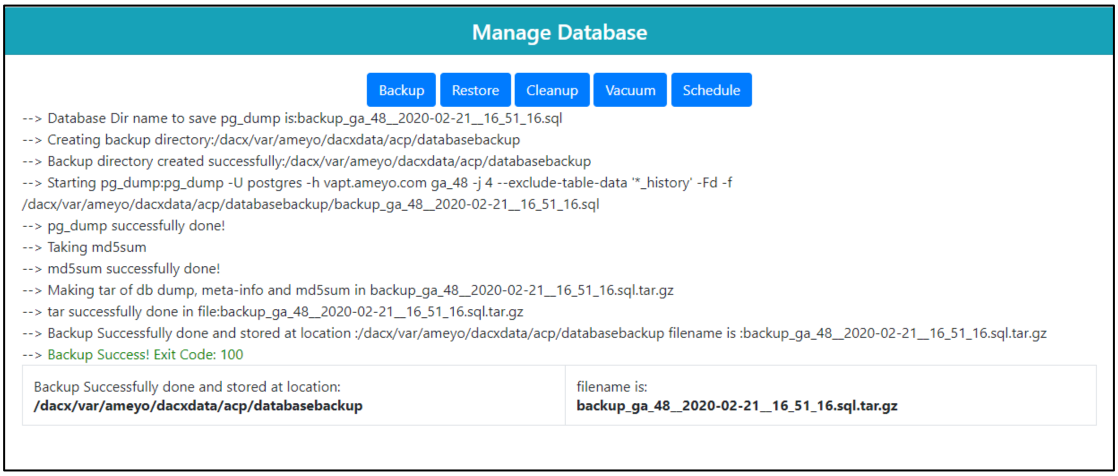


Figure: Backup Process

9. After completion of the backup procedure, you can download the database. Click "Download" to download the backup file.

   A. **Case 1:** If "Ask where to save each file before downloading" option is not checked, the voicelog will be saved as ".wave" file with the default name at the default download location of the Web browser.

   B. **Case 2:** If "Ask where to save each file before downloading" or other similar option is checked, then you have to perform the following steps to download the voicelog file.

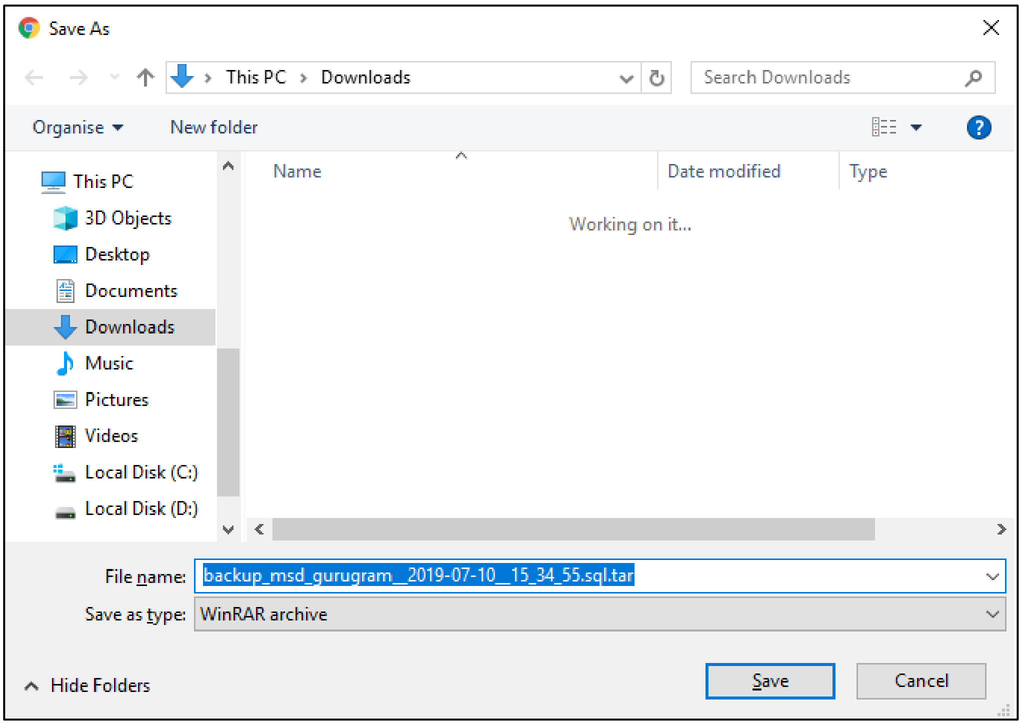


Figure: Dialog Box to download the file

I. Select the location where you want to save the file.

II. The default name of the file is the name of the database (of which backup is taken) followed by the present time stamp(YYYY-MM-DD-hr-mm-ss).

III. You can change filename in "File Name" textbox.

IV. Click "Save" button.

18.1.2 Restore

The Administrator can use the "Restore" tab in "Manage Database" to restore the already existing backup of a database. This feature can restore only those backups, which are generated through the Control Panel using the steps mentioned in "Section - Backup".

The restoration process will work for those databases which are directly linked with the Ameyo Server, Ameyo ART, and other components. If you restore the database to its previous state using the backup, then all current changes done after the backup process in the Ameyo and its linked databases will be lost. It may cause a collapse of the existing data from the database, and these data and changes cannot be restored using any method.

After clicking the button the following screen comes up, in which you have to select the database name.

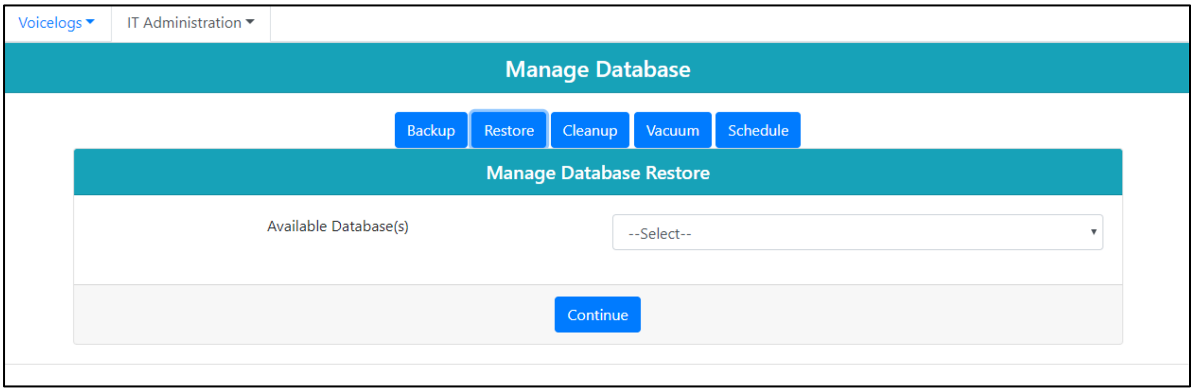


Figure: First Page of Restore Screen

Perform the following steps.

1. Select the database backup in "Available Databases" drop-down menu.

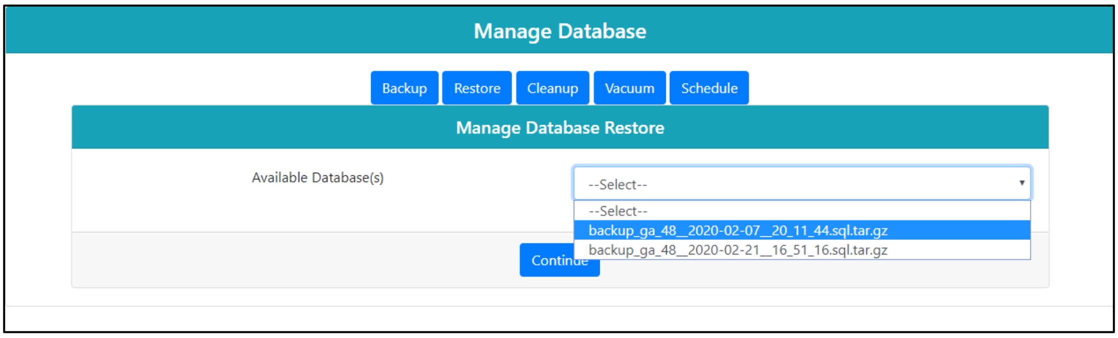


Figure: Restore Database Selection

2. Click "Continue" button. It shows the following page.

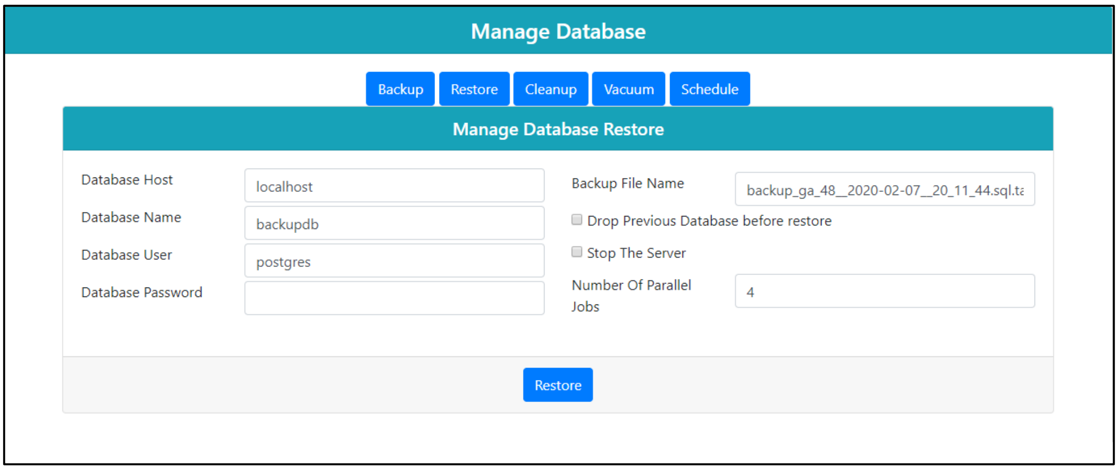


Figure: Authenticate the Database Server

3. **Database Host:** Provide domain name or IP Address of the server where the database is located.
4. **Database Name:** Provide the database name in which you want to restore the backup.

   Provide the correct database name on which you want to apply the database restore procedure. The restore option will work on the connected and product related databases only.

5. **Database User:** Provide the name of the database user who has full access over this database.
6. **Database Password:** Enter the password of the user.
7. **Backup File Name:** It shows the already selected backup file name, which has to be restored.
8. **(Optional) Drop previous database before restore:** If you want to delete the previous database, then select this checkbox.
9. **(Optional, but Recommended) Stop the Server:** Enable this feature, if you want to stop the server while restoring the database.

10. **Number of Parallel Jobs:** Provide the total number of jobs that can be executed parallelly, that is, the total number of jobs that can be performed at any instant of time.
11. Click "Restore" button to restore the selected backup. It may take few minutes to complete the task.

18.1.3 Cleanup

Cleanup process in Ameyo helps the Administrator to delete the obsolete data from those tables that are not so much important. It may help to free up the storage space on the server increase the server efficiency. Click "Cleanup" tab to access its page.

The data will be permanently removed from those databases, which will be selected for Cleanup. There is no way to restore the same. So, use this option consciously.

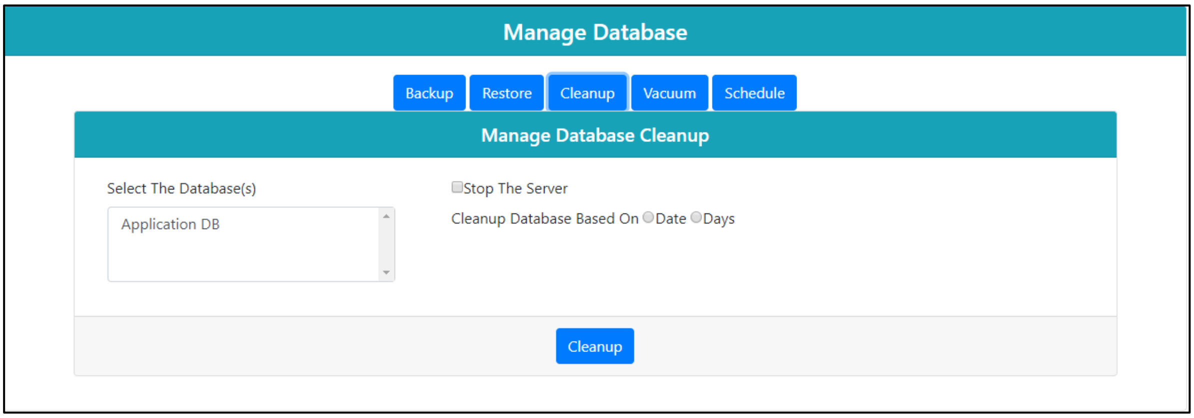


Figure: Cleanup Management

Perform the following steps.

1. **Select Database:** Select the name of the database on which the cleanup process needs to begin.

2. **Cleanup database based on:** It allows the user to delete the database based on the following two criteria.
    A. **Date:** Select the Date option and provide the date up to which the records need to delete, to delete the older records from the particular date.
    B. **Days:** To delete the records for the given set of days, select this option and provide the number of days for which records need to delete.
3. **(Advanced Feature, Skip it) Override Cleanup Schedule for individual tables: :** Click "Override Cleanup Schedule for individual table" link, to override the cleanup process for the selected tables. It is helpful in case when there is a need to keep the data of the tables that are needed for the organization point of view.

    We recommend it to use this feature only in supervision of Ameyo Support team.
4. **(Optional, but Recommended) Stop the Server:** Enable this option to stop the Server while performing the Cleanup task. This option is optional but recommended. It helps the Server to stop and wait for the completion of cleanup process to avoid any kind of the discrepancy in the server.
5. Click "Cleanup" button to start the cleanup task.
6. It may take few minutes to complete the process depending upon t he size of the database.

18.1.4 Vacuum

Vacuum is the default process of "PostgreSQL" itself. It reclaims the storage occupied by the dead tuples. During normal PostgreSQL operations, some tuples that are obsoleted or deleted by an update, are not removed physically from their tables. They remain there until a Vacuum process is run. It is recommended to execute the Vacuum process periodically, especially on those tables that are being updated frequently.

The data will be permanently removed from those databases, which will be selected for Vacuum. There is no way to restore the same. So, use this option consciously.

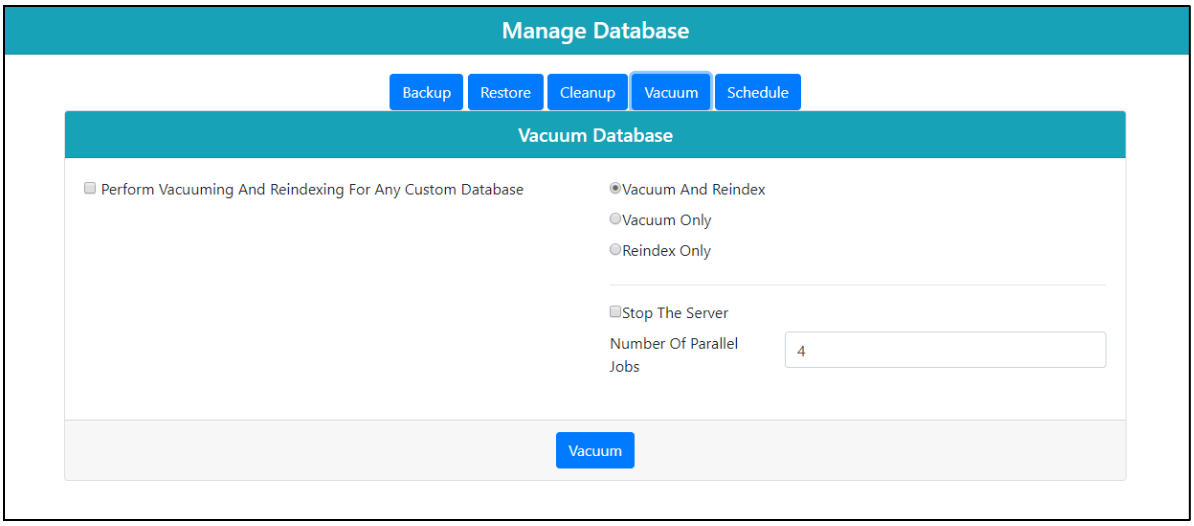


Figure: Vacuum Database

Perform the following steps to use the vacuum operation.

1. **<u>Perform Vacuuming and Reindexing for Custom Database</u>:** Click "Perform Vacuuming and Reindexing for the specific database to perform the vacuum operation on the selected database. Selecting it shows the following fields.

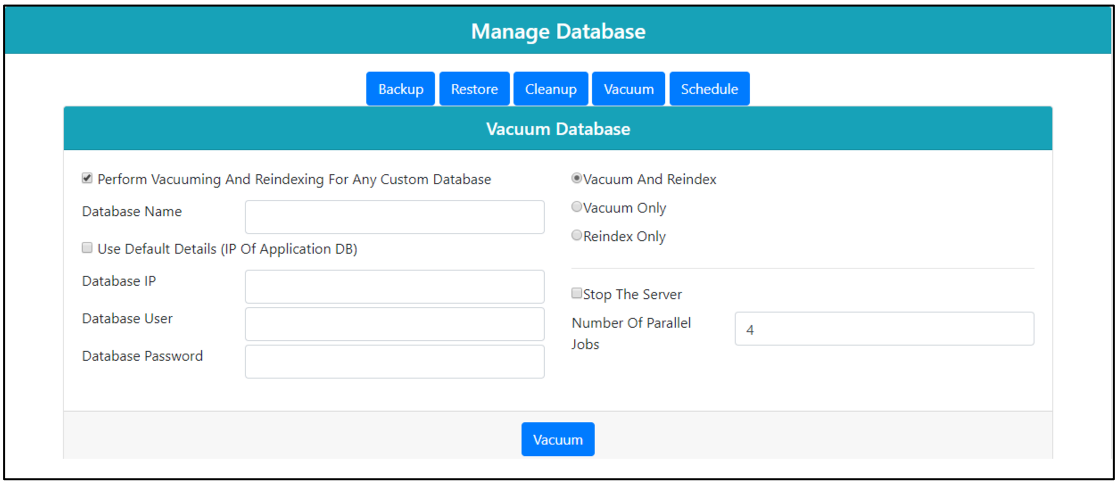


Figure: Details of Vacuum Process

A. **Database Name:** Provide the name of the database on which you want to perform the vacuum task.

B. **Password:** Enter the password of the database through which the database can be logged-in.

C. **IP Address:** Provide the IP address of the database.

2. **Vacuum and Reindex:** Enabling this feature gives the database permission to vacuum and Reindex the database with one command.
3. **Vacuum only:** This feature only allows the database to perform the vacuum function. This includes the deleting of unnecessary data only.
4. **Reindex only:** It allows the database to Reindex the wrong data positioning only.
5. Click "Vacuum" button to start the process.
6. The process may take few minutes to complete the process depending upon the size of the database.

Vacuum operation is also known as the "Garbage Management" operation of the Database.

18.1.5 Schedule

18.1.5.1 Schedule

"Schedule" Tab allows you to automate the operations, which are discussed in "Manage Database" Tab. Here, you can create the automated tasks for the following operations.

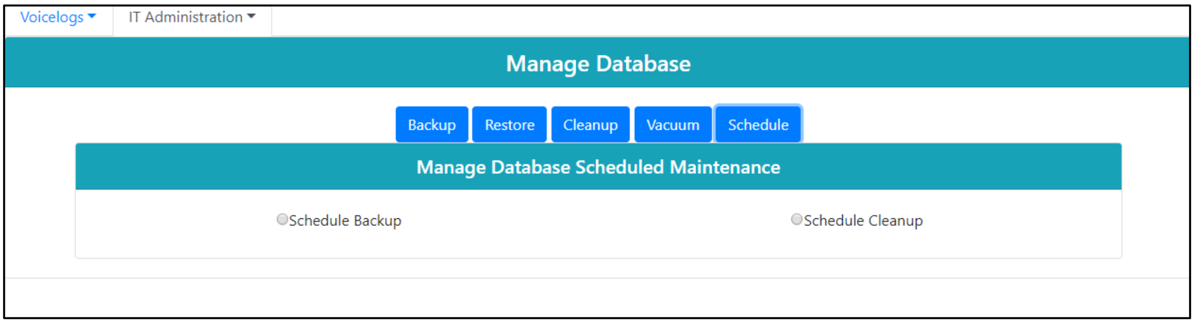


Figure: Schedule Tab

Following operation can be performed on the Schedule tab.

1. Schedule Backup
2. Schedule Cleanup

18.1.5.2 Schedule Database Backup

It is the default page when you come at "Schedule" Tab in "Manage Database". It enables the Administrator to create the scheduled jobs to backup the selected database at the specified intervals automatically.

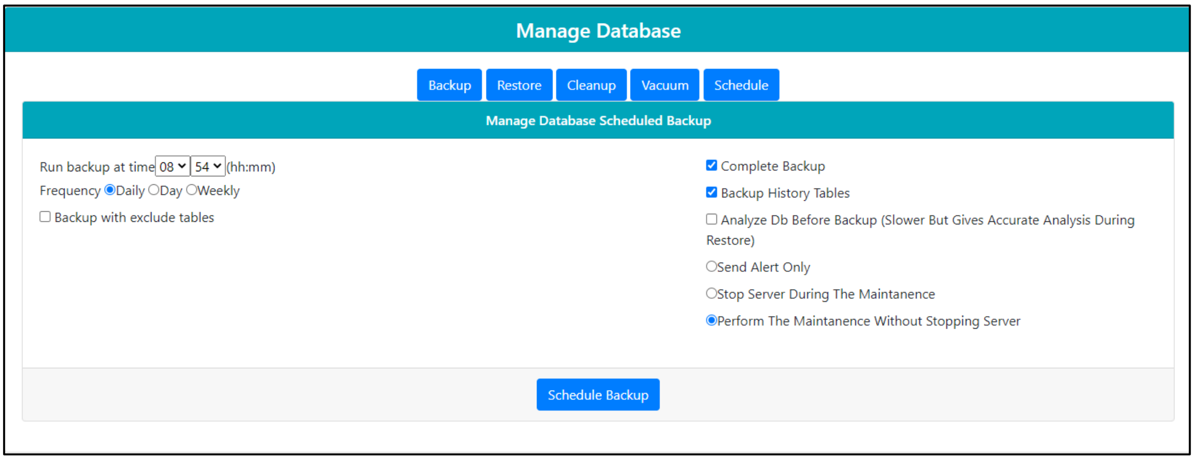


Figure: Schedule Backup

Perform the following steps.

1. **Schedule Enable:** Check "Schedule Enable" box to create the scheduled jobs to backup the database automatically.

   It is recommended to schedule the database operation in a non-working hour or when the workload is minimum like at midnight.

2. Select any of the following frequency options.

   A. **Daily:** Select it to take the daily backup of the selected database at the selected time automatically.

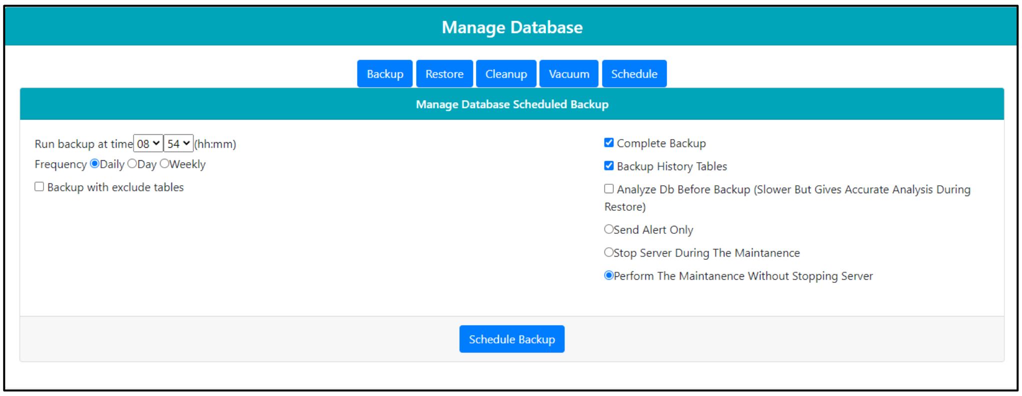


Figure: Schedule Backup Daily

B. **<u>Day</u>:** Select it to specify a particular day when the backup of selected database will be taken automatically. Perform the following steps.

I. Click to select "Day" radio button. It shows the options to select the day and its month.

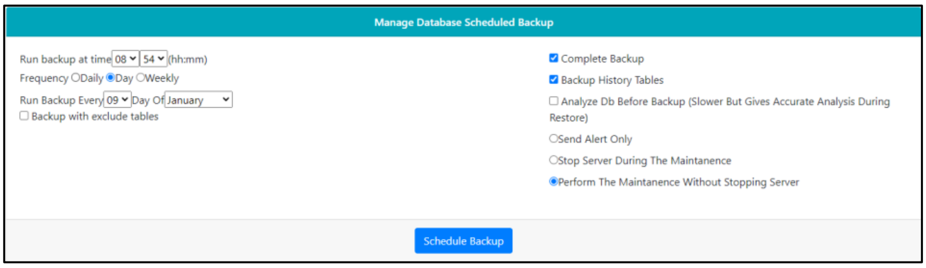


Figure: Schedule Backup as per "Day"

II. Select the day using the drop-down menu. It contains the values from "1" to "31".

III. Now, select the month in adjacent drop-down menu. It contains the following values.

a. **1:**It means January month.

b. **2:**It means February month.

c. **3:**It means March month.

d. **4:**It means April month.

e. **5:**It means May month.

f. **6:**It means June month.

g. **7:**It means July month.

h. **8:**It means August month.

i. **9:**It means September month.

j. **10:**It means October month.

k. **11:**It means November month.

l. **12:**It means December month.

m. **All:** It means the schedule will run on the selected day of all months of the year.

IV. IV.Select the hours and minutes to define when the schedule job will run on the selected day.

If you select the particular month in the month section, then the scheduling task will starts once on a year. Hence this operation is not recommended.

C. **Week:** Select it to take the weekly backup of the selected database at the selected time at the selected day of the week. Perform the following steps.

I. Select "Week" radio button. It shows the drop-down menu for week.

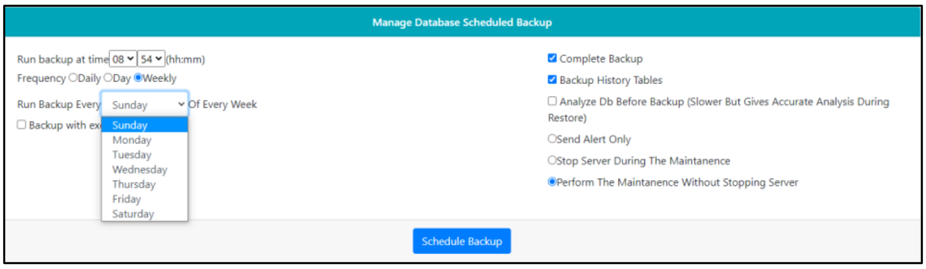


Figure: Schedule Backup as per "Week"

II. "Run backup every _____ at" drop-down menu contains the following options.

a. Sunday

b. Monday

c. Tuesday

d. Wednesday

e. Thursday

f. Friday

g. Saturday

h. Sunday

III. Select the hours and minutes to define when the schedule job will run on the selected week day.

3. **Backup with Exclude Tables:** Enable the checkbox if you want to exclude some tables from the backup of the database.

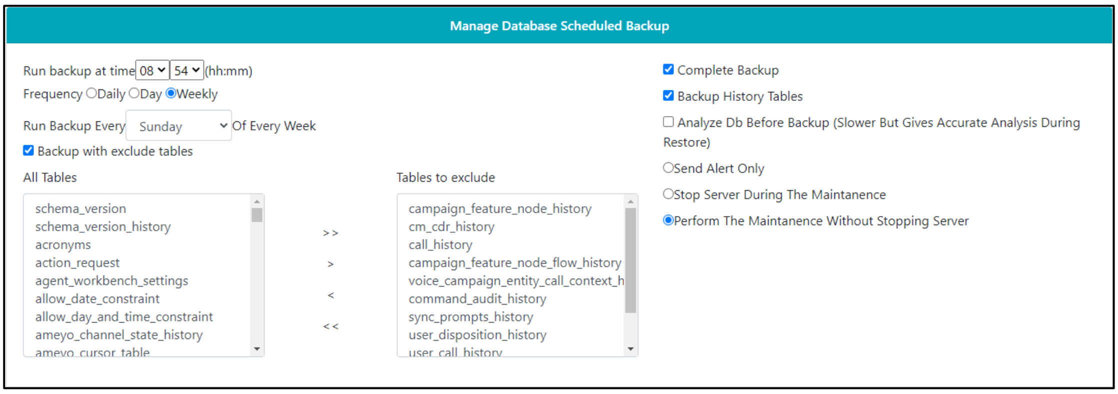


Figure: Exclude Tables from Backup

Select the tables from "All Tables" list and click **>** to exclude the table from the backup process. If the user wants to include the excluded table back into the backup process, then select the table name from "Tables to exclude" list and click **<**.

To exclude all listed tables, then click >> option; else click << to include all tables from the excluded list.

4. **Complete Backup:** Enable the Complete Backup checkbox to take the backup of the complete database. Uncheck means that the backup will be taken for only the selected tables from the "Backup with Exclude Tables" list.

5. **History Tables:** Select "History Tables" checkbox to include the history tables in the backup process.

(Optional) Analyze DB before Backup: Select this option to enable analyzing process of the database before the scheduling process starts.

6. **Send Alert Only:** Select it to send the notification to the Administrator in Control Panel whenever the schedule job will start. However, this notification will not be visible if the Administrator is browsing other tabs in its console instead of being available at Control Panel.
7. **(Recommended) Stop Server during Maintenance:** Enable this feature to stop the server for some time until the scheduling of Operation does not complete.
8. **Perform Maintenance without Stopping Server:** : It does not impact the performance of the server and hence enabling this feature makes the leaves the server in the working condition during the Scheduling process, and therefore, the working of Server does not get impact.
9. Click "Save" button to save the schedule. It shows the following message on the page.

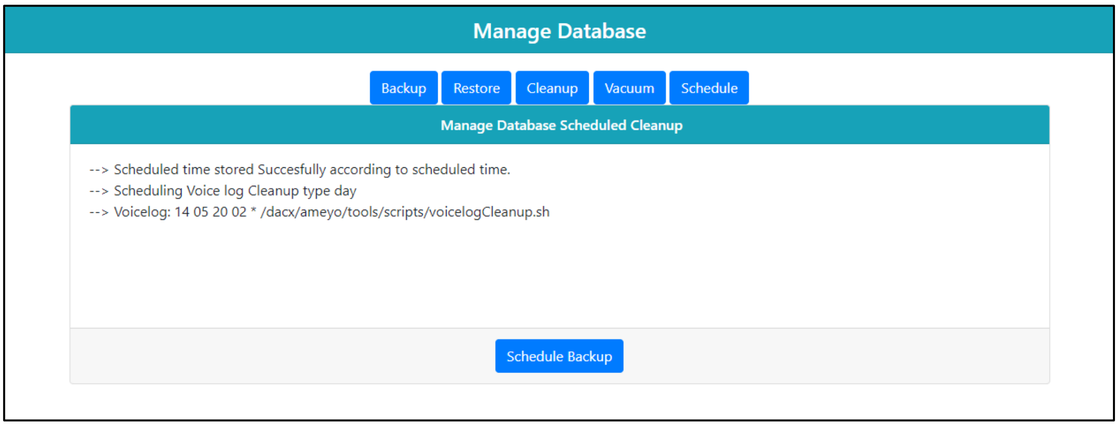


Figure: Schedule Backup Job

10. Click "link" button to return to the main page of the Control Panel.

18.1.5.3 Schedule Database Cleanup

This feature is not recommended by Ameyo, as enabling this feature can downgrade the Server Performance of the Server. If at the time of Scheduling the operation gets an error due to any reason, then it may lead to shutdown the Server as well.

This feature allows the Administrator to create the scheduled jobs that will run at the specified intervals automatically to delete the specified voicelogs permanently.

Schedule Cleanup will delete the specified voicelogs permanently. There is no way to restore them. So, please use this feature consciously.

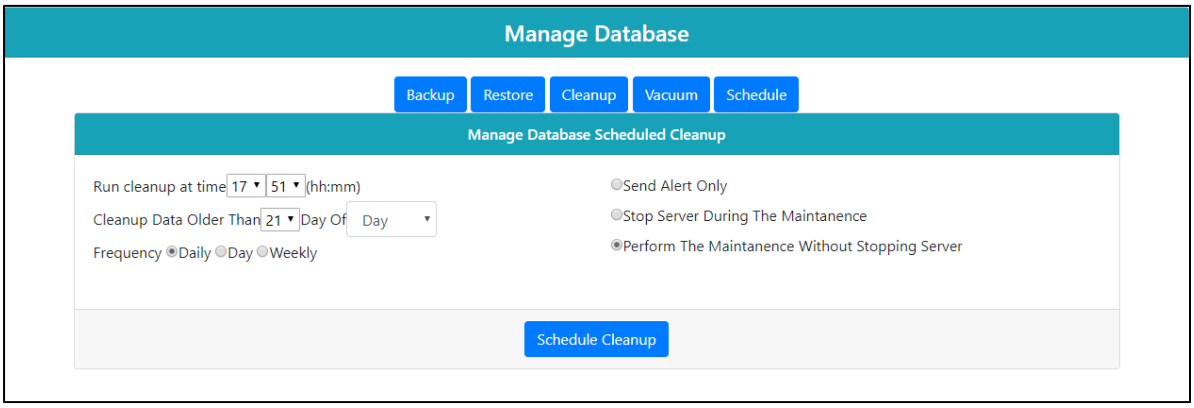


Figure: Schedule Cleanup Process

Perform the following steps to enable the Scheduling.

1. **schedule Enable:** Check "Schedule Enable" box to create the scheduled jobs to Cleanup the database automatically.

   It is recommended to schedule the cleanup operation in a non-working hour or when the workload is minimum like at midnight.

2. Select any of the following frequency options.

   A. **Daily:** Select it to take the daily cleanup of the selected database at the selected time automatically.

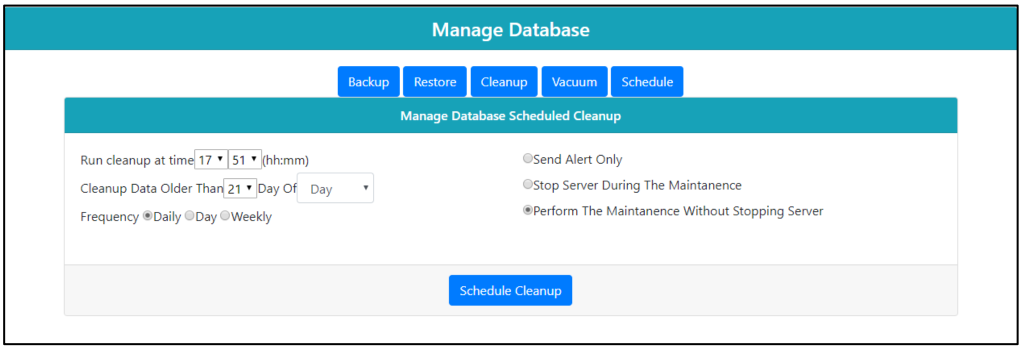


Figure: Schedule cleanup Daily

B. **<u>Day</u>:** Select it to specify a particular day when the Cleanup of selected database will be taken automatically. Perform the following steps.

I. Click to select "Day" radio button. It shows the options to select the day and its month.

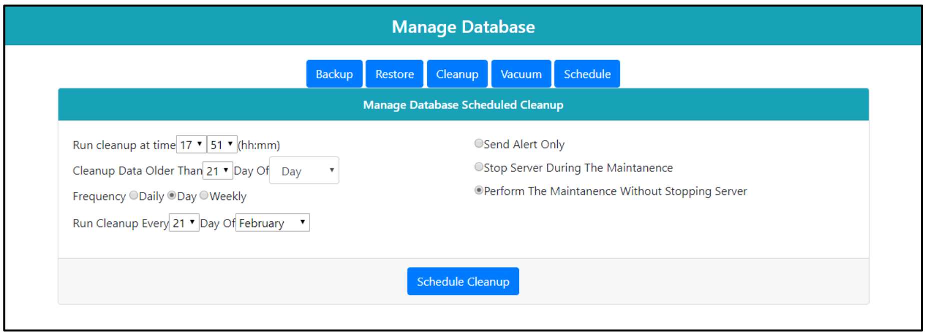


Figure: Schedule Cleanup as per "Day"

II. Select the day using the drop-down menu. It contains the values from "1" to "31".

III. Now, select the month in adjacent drop-down menu. It contains the following values.

a. **1:**It means January month.

b. **2:**It means February month.

c. **3:**It means March month.

d. **4:**It means April month.

e. **5:**It means May month.

f. **6:**It means June month.

g. **7:**It means July month.

h. **8:**It means August month.

i. **9:**It means September month.

j. **10:**It means October month.

k. **11:**It means November month.

l. **12:**It means December month.

m. **All:** It means the schedule will run on the selected day of all months of the year.

IV. Select the hours and minutes to define when the schedule job will run on the selected day.

If you select the particular month in the month section, then the scheduling task will starts once on a year. Hence this operation is not recommended.

C. **<u>Week</u>:** Select it to take the weekly Cleanup of the selected database at the selected time at the selected day of the week. Perform the following steps.

I. Select "Week" radio button. It shows the drop-down menu for week.

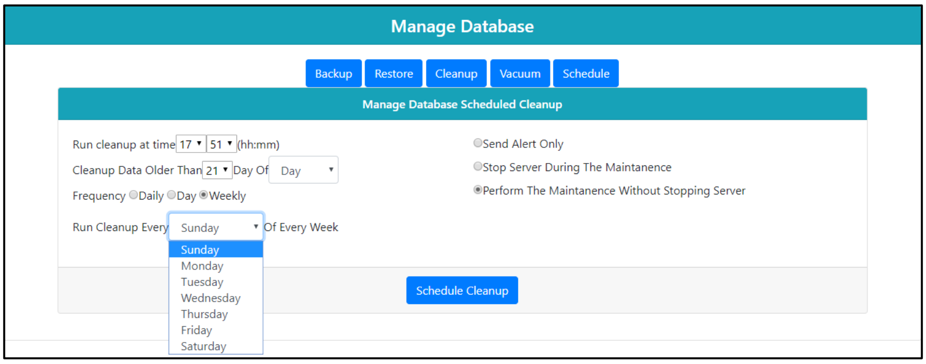


Figure: Schedule Cleanup as per "Week"

II. "Run Cleanup every _____ at" drop-down menu contains the following options.

a. Sunday
b. Monday
c. Tuesday
d. Wednesday
e. Thursday
f. Friday
g. Saturday
h. Sunday

III. Select the hours and minutes to define when the schedule job will run on the selected week day.

3. **4.Cleanup data older than:** Provide the number of the days for which you want perform the cleanup task. Enter the number of days after which the database starts the cleanup process.
4. **Send Alert Only:** Select it to send the notification to the Administrator in Control Panel whenever the schedule job will start. However, this notification will not be visible if the Administrator is browsing other tabs in its console instead of being available at Control Panel.
5. **Override Cleanup schedule for Individual tables:** Click it to schedule the cleanup process for the particular table.
6. **(Recommended) Stop Server during Maintenance:** Enable this feature to stop the server for some time until the scheduling of Operation does not complete.

7. **Perform Maintenance without Stopping Server:** : It does not impact the performance of the server and hence enabling this feature makes the leaves the server in the working condition during the Scheduling process, and therefore, the working of Server does not get impact.
8. Click "Save" button to save the schedule. It shows the following message on the page.

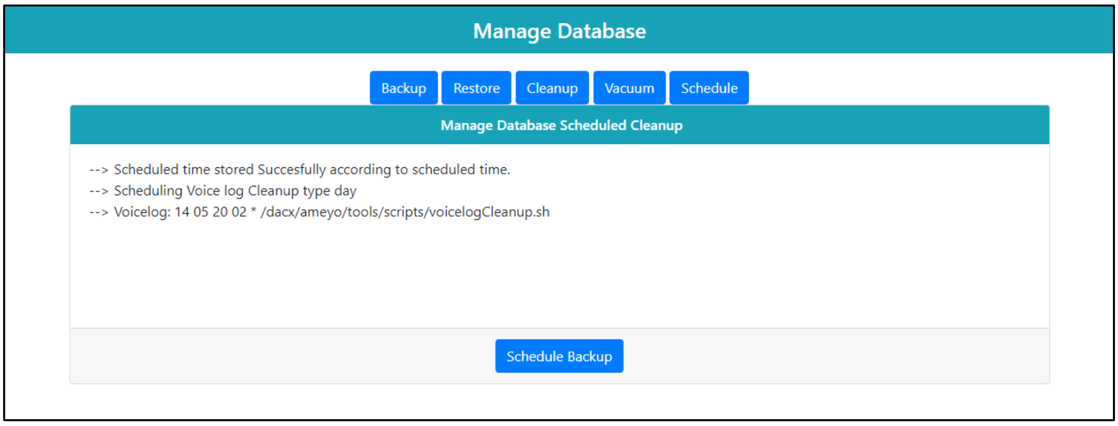


Figure: Schedule Cleanup Job

9. Click "link" button to return to the main page of the Control Panel.

18.2 Manage Backups

"Manage Backup" Tab allows the Administrator manage the backups created by the Control Panel. Administrator can view the backup, download the backup files, and permanently delete the backups. Click "Manage Backup" tab in the IT Administration Menu.

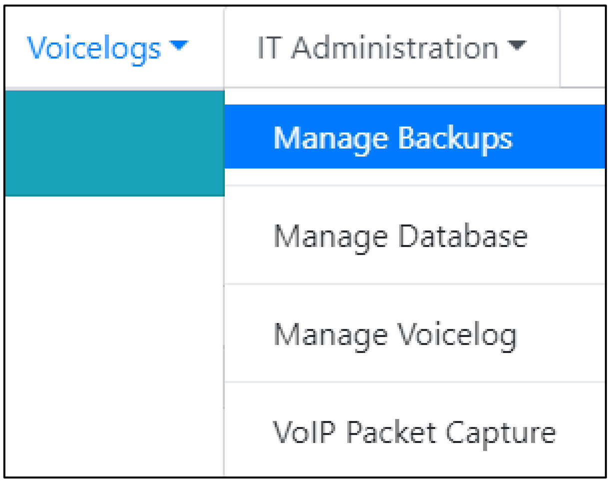


Figure: Manage Backup Tab

It shows "Manage Backups" page.

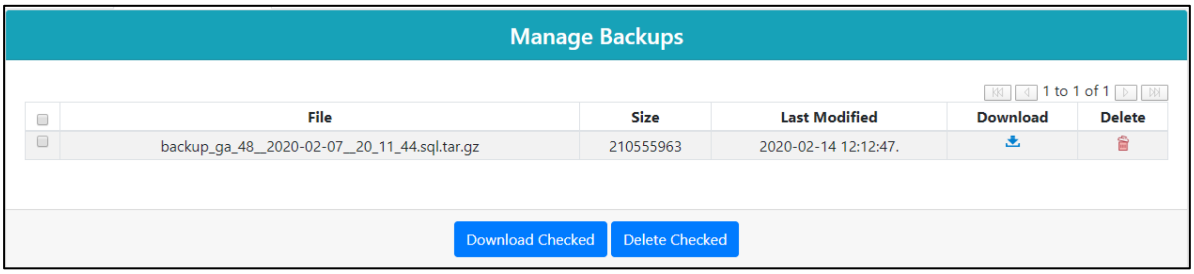


Figure: Backup List

The administrator can perform the following operations on this page.

1. **Download:** Click "Download" to download the backup file. This option is based upon "Save As" functionality of the Web browser.

   It is recommended to keep "Ask where to save each file before downloading" or similar option checked in your Web Browser so that you can specify the name and path to save the files.

   A. **Case 1:** If "Ask where to save each file before downloading" option is not checked, the voicelog will be saved as ".wave" file with the default name at the default download location of the Web browser.

B. **Case 2:** If "Ask where to save each file before downloading" option is selected, then the following dialog box is displayed.

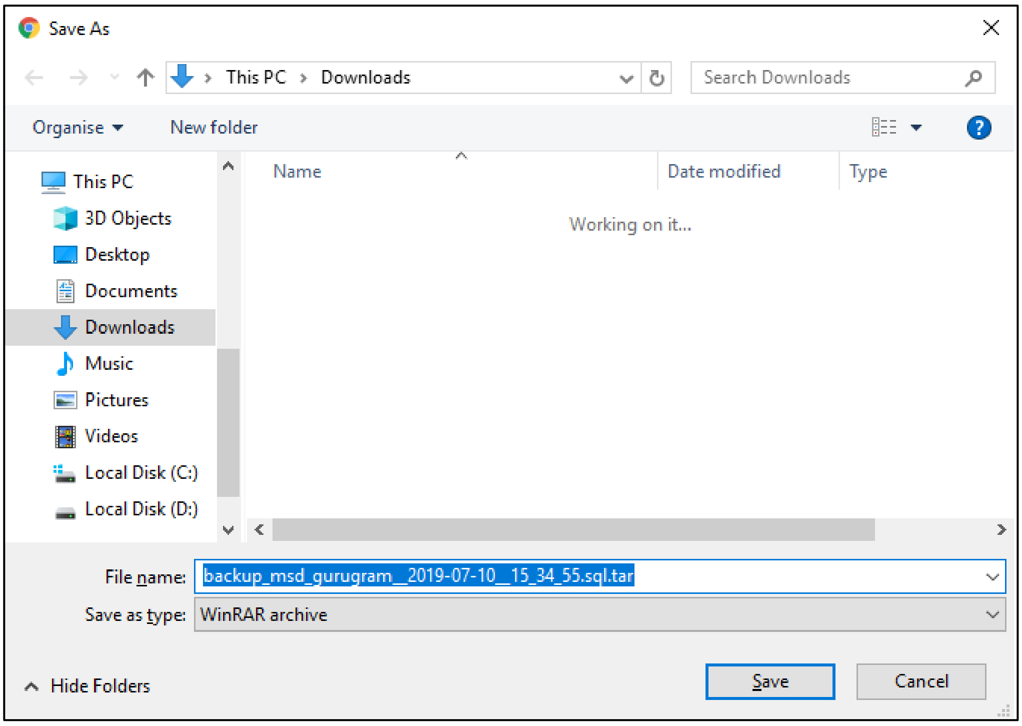


Figure: Dialog Box to download the file

Perform the following steps.

I. Select the location where you want to save the file.
II. The default name of the file is the name of the database (of which backup is taken) followed by the present time stamp(YYYY-MM-DD-hr-mm-ss).

III. You can change filename in "File Name" textbox. The file always be in the ".zip" file.

IV. Click "Save" button.

2. **<u>Delete Backup</u>:** There may be some cases where you have to delete the backup file, especially when a backup file is very old and the latest stable backups are available.

There is no way to restore the deleted backup file. So, use this option consciously.

Use this option only to delete the backup file. It helps the user to delete all the voicelogs to delete permanently from the server. Perform the following steps to delete all voicelogs.

A. Click "Delete" button. A pop-up dialog comes up to ask for the confirmation of the deleting process.

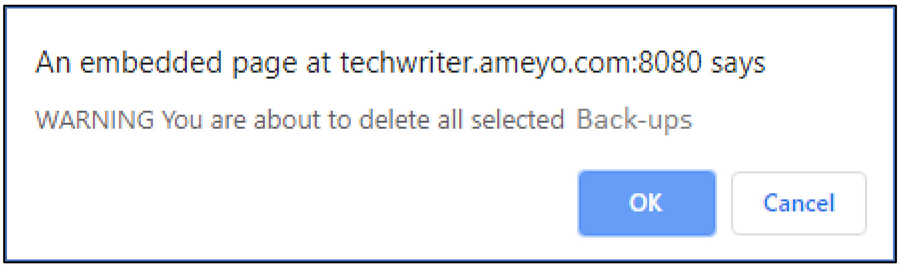


Figure: Delete Backup Confirmation

B. Click "OK" to delete the backup; else click "Cancel."

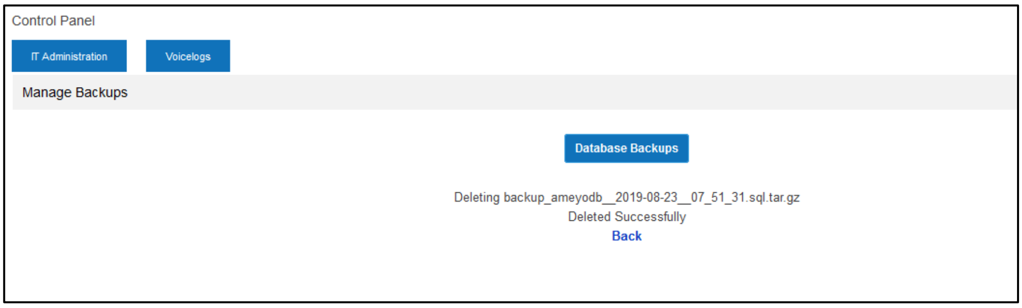


Figure: Backup Deleted

C. On the next page, the backup delete confirmation starts appearing. It also shows the backup name with its location as well.

On the opened page, there are two options available after the deletion process of the backup. Select the option according to your preferences.

1. **Database Backups:** Clicking this button redirects you to the main page of the "Manage Backups" Menu.
2. **Back:** Clicking this button redirects you on the complete backup list page of Manage Backup Menu.

18.3 Manage Voicelogs

With the help of Manage Voicelogs, the Administrator can easily manage the voicelogs. Click "Manage Voicelog" option in "IT Administration".

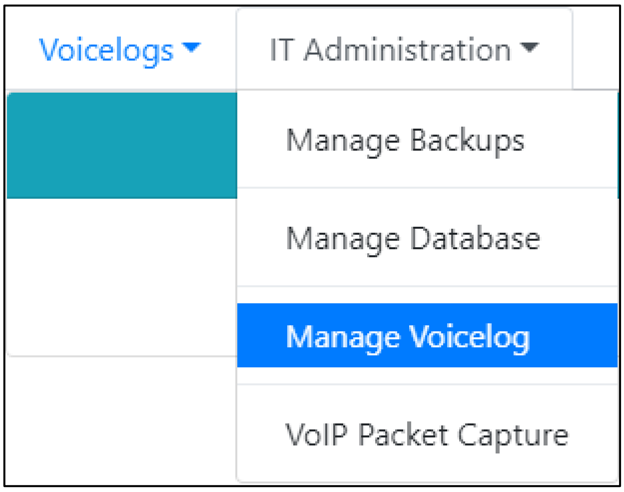


Figure: Manage Voicelog

It shows the following page.

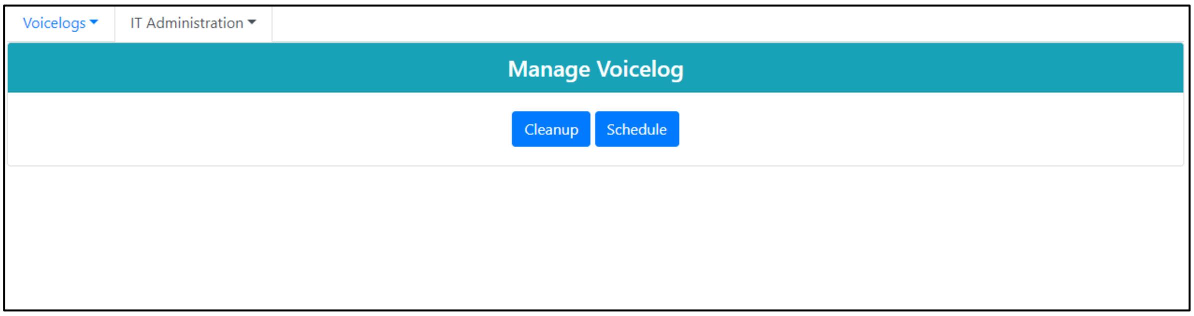


Figure: Cleanup Process

Administrator can perform the following two primary operations here.

1. Voicelog Cleanup
2. Voicelog Schedule

18.3.1 Manual Voicelogs Cleanup

Cleanup allows the Administrator to permanently delete the voicelogs.

The voicelogs deleted through manual or scheduled "Cleanup" process cannot be restored. So, we recommend to use this feature consciously.

"Cleanup" option provides the privilege to clean the specific voicelogs to get free storage space and to increase the server efficiency.

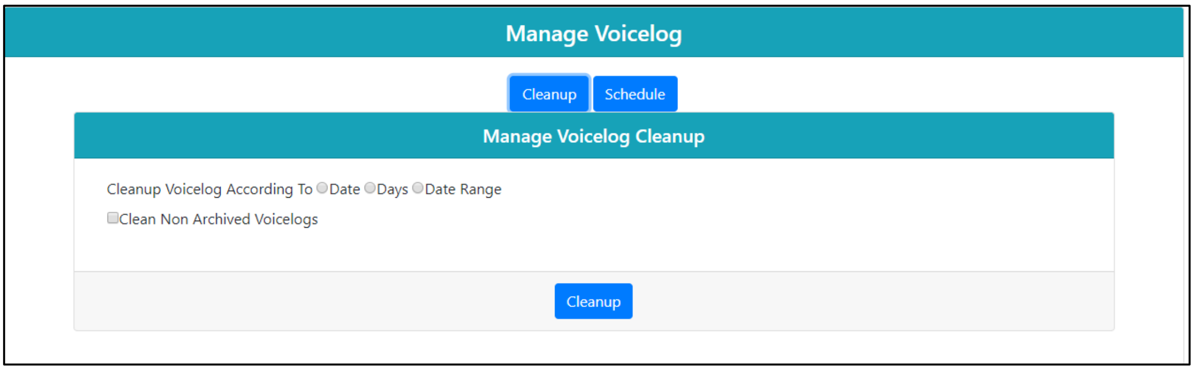


Figure: Cleanup Process

Perform the following steps:

1. **Date:** If the user wants to delete the records older than the specific date, then this option is useful. When you select this option, it shows "Cleanup voicelogs records older than the provided date" at the bottom. The required date and time format in the form of current date and time will be displayed in this textbox. You can manually type the required date and time, voicelogs before which the voicelogs will be deleted.

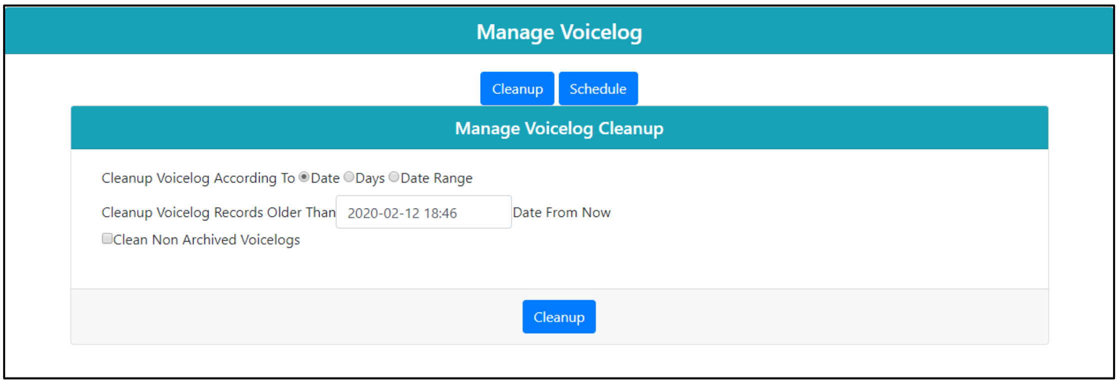


Figure: Cleanup Date-wise

2. **Days:** Provide the number of the days for which the user wants to keep the Voicelog records.

eleted.

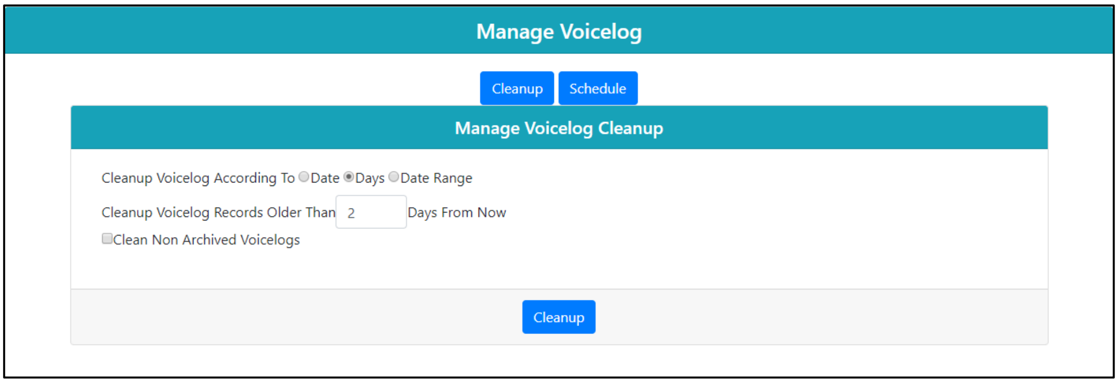


Figure: Cleanup Days-wise

For example, 5 means all the logs older than five days get deleted. Enter the number of days manually in the textbox.

3. **Date Range:** In this option, all the records in the provided time span duration remain in the system only, rest all the records except the records available in the given time span gets deleted from the system.

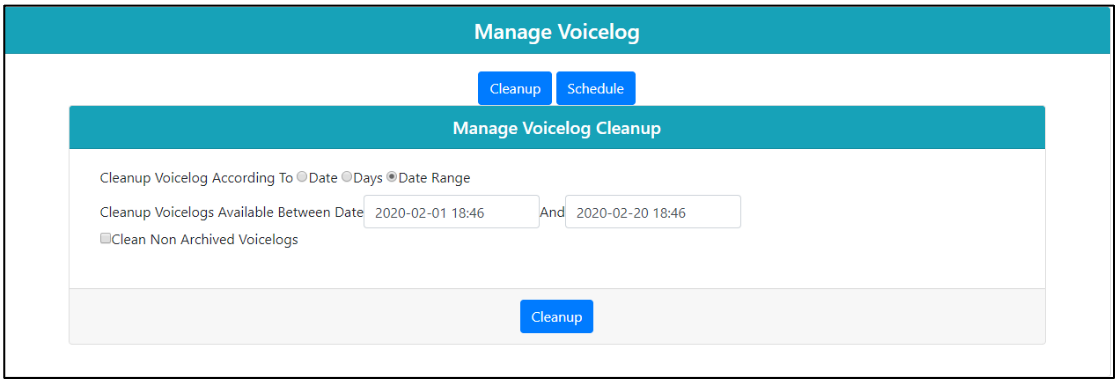


Figure: Cleanup Process

A. Provide the start date from which the cleanup process will start its job.

B. Provide the end date till which the cleanup process will end its jobs.

C. The voicelogs recorded between the provided date range will be deleted permanently.

4. **Non-Archived Voicelogs:** Those Voicelogs which are not archived by the user gets deleted. Archiving means to save the records. Select this option to clean only archived logs. It helps to delete only those logs which are backed up.

There is no way to restore the voicelogs cleaned up through this process. So, use this option consciously.

5. Click "Cleanup" to start the cleanup process.

18.3.2 Schedule Voicelog Cleanup

The cleanup process can be scheduled also. It helps you the system to automate the process of cleaning up the selected voicelogs repeatedly on the predefined intervals.

Schedule Cleanup will delete the specified voicelogs permanently. There is no way to restore them. So, please use this feature consciously.

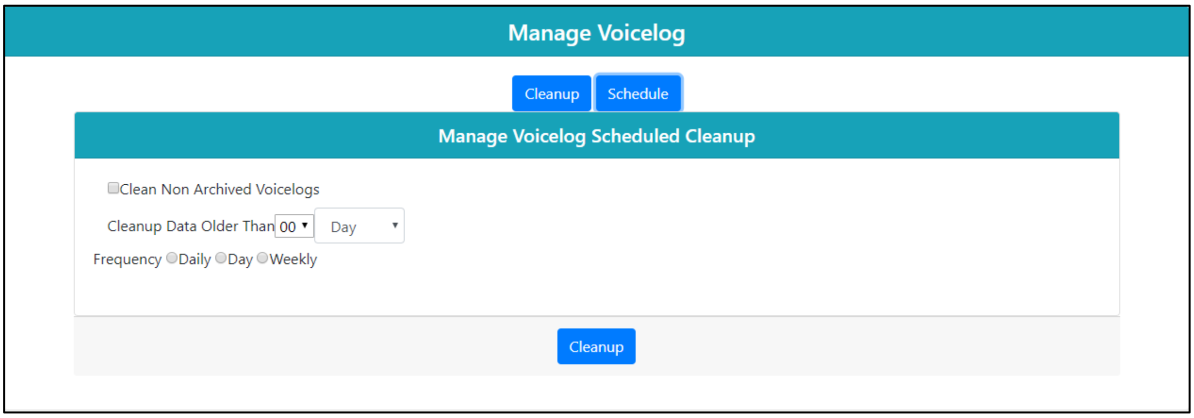


Figure: Schedule Voicelogs

Perform the following steps:

1. **Cleanup Non Archived Voicelogs**: Enable this feature to cleanup the data of the non-archived voicelogs. It helps you to cleanup only those voicelogs, which have been archived. It will not delete the new voicelogs, which are not archived.
2. **Cleanup Data older than**: Here, you have to select the time period. The voicelogs recorded before this time period will be deleted. It contains two drop-down menus.
   A. **Day(s)/Week(s)/Months(s)**: Select any of the following options.

I. Days

II. Weeks

III. Months

B. **Numbers**: : Select any value from "1" to "31". For example, 6 months has been selected. It will specify that the Ameyo system will cleanup (permanently delete) the voicelogs generated before 6 months from the date and time when the schedule job will run.

3. **Daily**: Select it to take the schedule the daily cleanup of voicelogs at the selected time automatically.

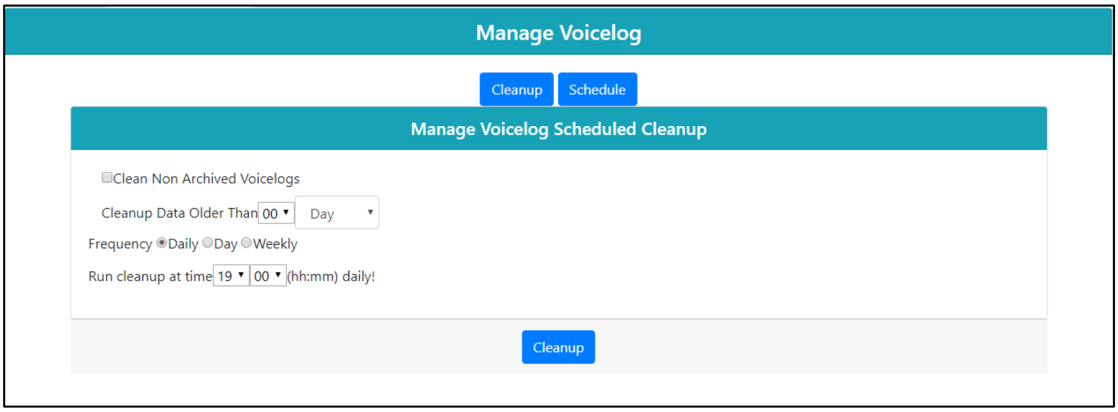


Figure: Schedule Voicelogs Cleanup Daily

4. **Day**: Select it to specify a particular day to cleanup the database automatically at the selected day at the specified time. Perform the following steps.

A. Click to select "Daily" radio button. It shows the options to select the day and its month.

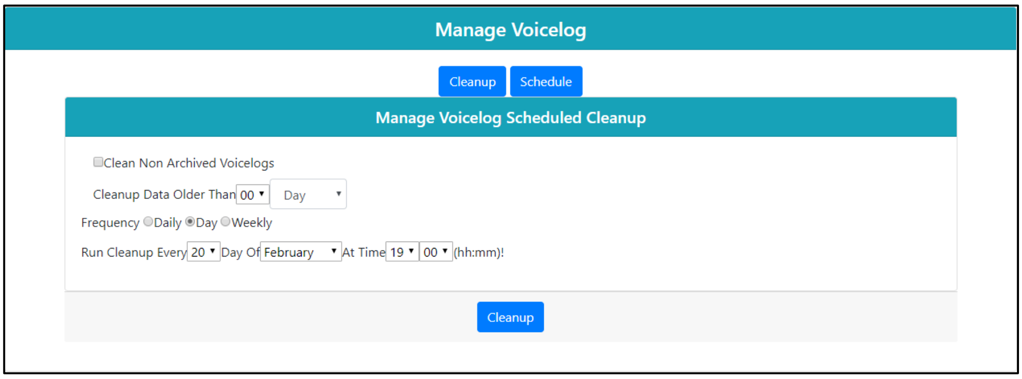


Figure: Schedule Voicelog Cleanup Day-wise

B. Select the day using the drop-down menu. It contains the values from "1" to "31".

C. Now, select the month in adjacent drop-down menu. It contains the following values.

I. **1:**It means January month.

II. **2:**It means February month.

III. **3:**It means March month.

IV. **4:**It means April month.

V. **5:**It means May month.

VI. **6:**It means June month.

VII. **7:**It means July month.

VIII. **8:**It means August month.

IX. **9:**It means September month.

X. **10:**It means October month.

XI. **11:**It means November month.

XII. **12:**It means December month.

D. Select the hours and minutes to define when the schedule job will run on the selected day.

If you select the particular month in the month section, then the scheduling task will starts once on a year. Hence this operation is not recommended.

5. **<u>Week</u>:** Select it to take the weekly backup of the selected database at the selected time at the selected day of the week. Perform the following steps.

   A. Select "Week" radio button. It shows the drop-down menu for week.

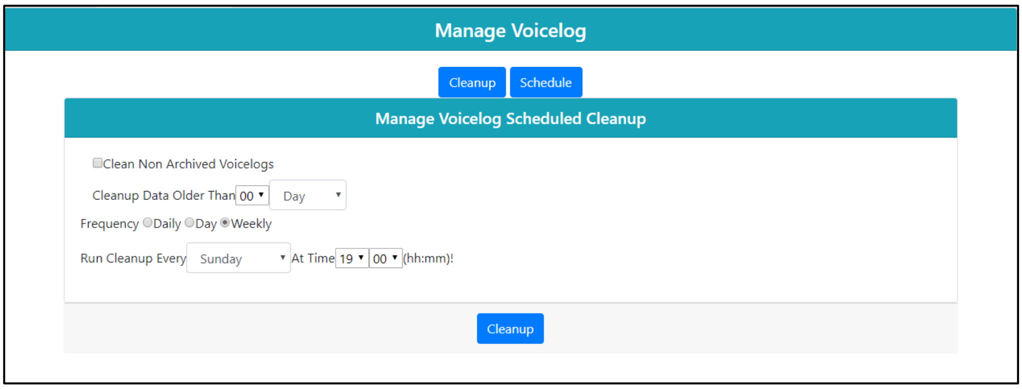


Figure: Schedule Voicelogs Cleanup Weekly

   B. "Run cleanup every _____ at" drop-down menu contains the following options.

      I. Sunday
      II. Monday
      III. Tuesday
      IV. Wednesday
      V. Thrusday
      VI. Friday
      VII. Saturday
      VIII. Sunday

C. Select the hours and minutes to define when the schedule job will run on the selected week day.

6. **Send Alert only**: Select it to send the notification to the Administrator in Control Panel whenever the schedule job will start. However, this notification will not be visible if the Administrator is browsing other tabs in its console instead of being available at Control Panel.
7. **Stop Server during Maintenance**: Enable this feature to stop the server for some time until the scheduling of Operation does not complete.
8. **Preform Maintenance without Stopping Server**: It does not impact the performance of the server and hence enabling this feature makes the leaves the server in the working condition during the Scheduling process, and therefore, the working of Server does not get impact.
9. Click "Save" button to schedule the job.

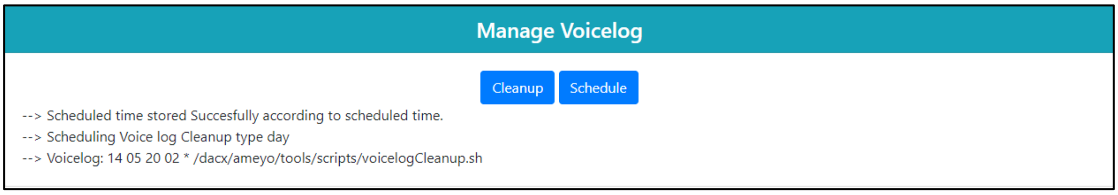


Figure: Scheduling Process

10. The cleanup is scheduled.

User can schedule this process according to his necessities. There are all the options available to cleanup the data like on the daily, day, or weekly basis according to the usage. Provide all the information through which scheduler starts its job and delete all the unnecessary records. After providing all the necessary information, click "Save" button.

18.4 (Licensable) VoIP Packet Capturing

VoIP Packet capturing in Ameyo provides the option to capture the Voice over Internet Protocol (VoIP). Click "VoIP Packet Capturing" in "IT Administration".

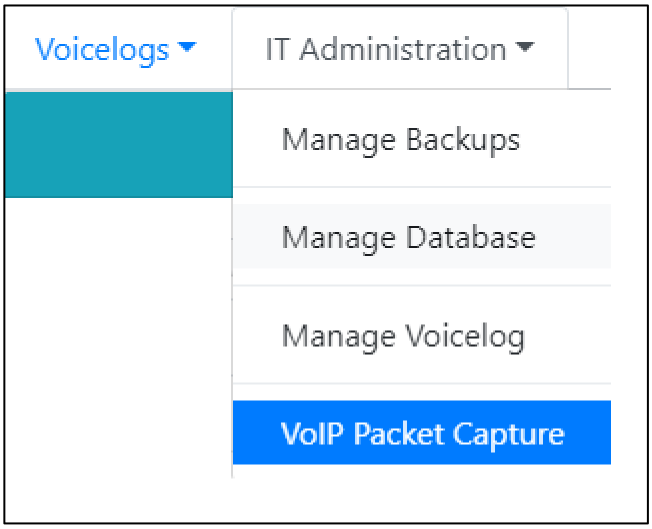


Figure: VoIP Packet Capturing

It shows the following page.

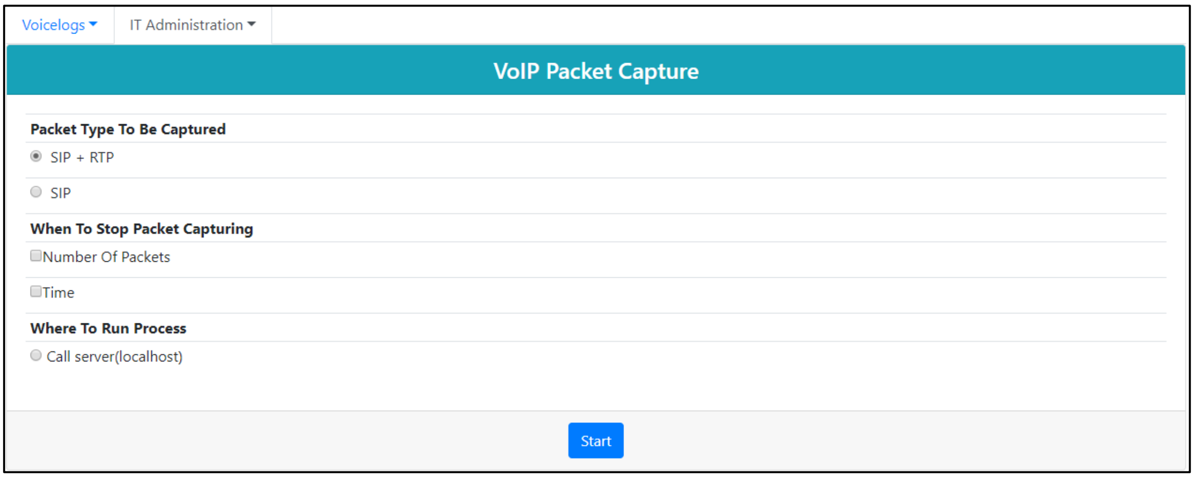


Figure: VoIP Packet Capturing Screen

Following is the definition of the terminologies used in VoIP Capturing in Ameyo.

1. **VoIP Sieve:** It is a tool to capture SIP and RTP packets for performing the troubleshooting related to VoIP. In simple language, the packets that needs to be transferred from one place to another are refined using some pre-defined algorithms and processes. This feature helps to transfer only the necessary packets, and other packets which are not so much useful gets omitted.
2. **Basic SIP Call Flow:** The call flow that is being used in a VoIP call is displayed hereinbelow.

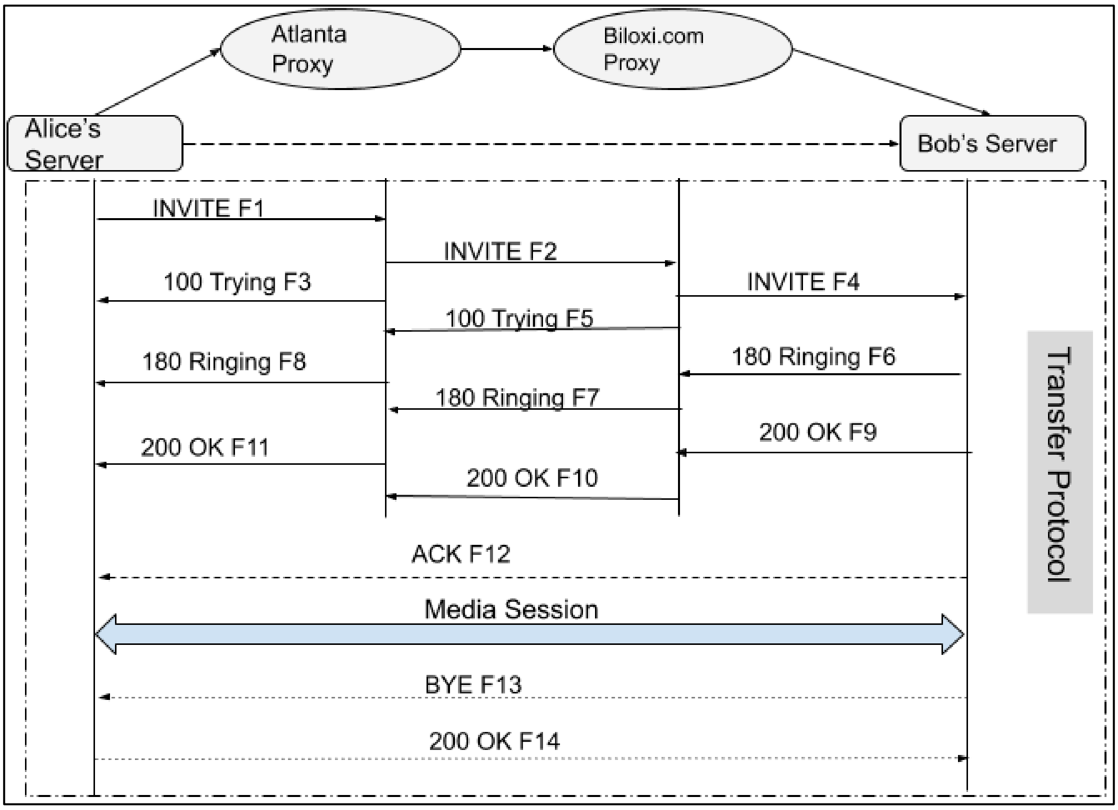


Figure: VoIPFlow

VoIP Call Flow displayed in the above image is described hereinbelow.

1. A user named as Alice is calling to another user named as Bob. Instead of connecting the call directly to Bob's server, it first connects

to the Atlanta server, which is a proxy server situated in some other country. Then the call connects with another proxy server named as Biloxi server, which is again a proxy server. Now, this call connects with Bob's server. In the above scenario, all the proxy server is chosen based on the availability of servers.

2. Usage of the proxy servers to transfer the packets between servers provides the security to the data packets. The above example can be assumed as a person going to its home from office choose the alternate path instead of choosing the regular path, through which no one can trace the regularly used path. It ensures a level of security to that person.
3. In the above call flow, four **"INVITE"** keys are used. The functionalities of them are as follows:
    A. The **"INVITE F1"** shows that the request has been sent from the destination server.
    B. **"INVITE F2"** represents the ring time.
    C. **"INVITE F3"** is the acknowledgment message which acknowledges the source server that **"F1"** is successfully done.
    D. **"INVITE F4"** represents that the message is delivered to the destination server.
4. **"F5"** represents the acknowledgment message to the in-between channel servers.
5. There are three Ringing keys that represent the following functionalities.
    A. **"F6"** is the ringing time in which the call has been sent from the Bob's Server and to the first in-between proxy server.
    B. **"F7"**acknowledges the source server that the ringing has been successfully initiated at the destination server.

   C. **"F8"**notifies the source server about the successful completion of the ringing time.

6. After the call is completed successfully, OK message in three layers comes in-between.
   A. **"F9"**is "OK" message to represent that the destination successfully receives the call to the in-between first proxy server.
   B. **"F10"**is also an "OK" confirmation message that works in between the proxy servers.
   C. **"F11"**notifies the source server that the destination successfully picks up the call and is ready for the conversation with the source.
7. Once the destination receives the message, the function of "F12" starts. It sends the acknowledgment to the source server. It also helps the source server to identify that the message has been successfully delivered to the destination and no packet has been misplaced.
8. The message sends from the destination server is **"BYE,"** after this message the source server sends **"OK"** message.
9. Once OK message has been sent by the destination server, both the servers terminate their sessions to ensure that there is no trace of the call left in the destination. This acknowledgment is shown above is in terms of **"F13", "F14,"** and **"Media Session"**.

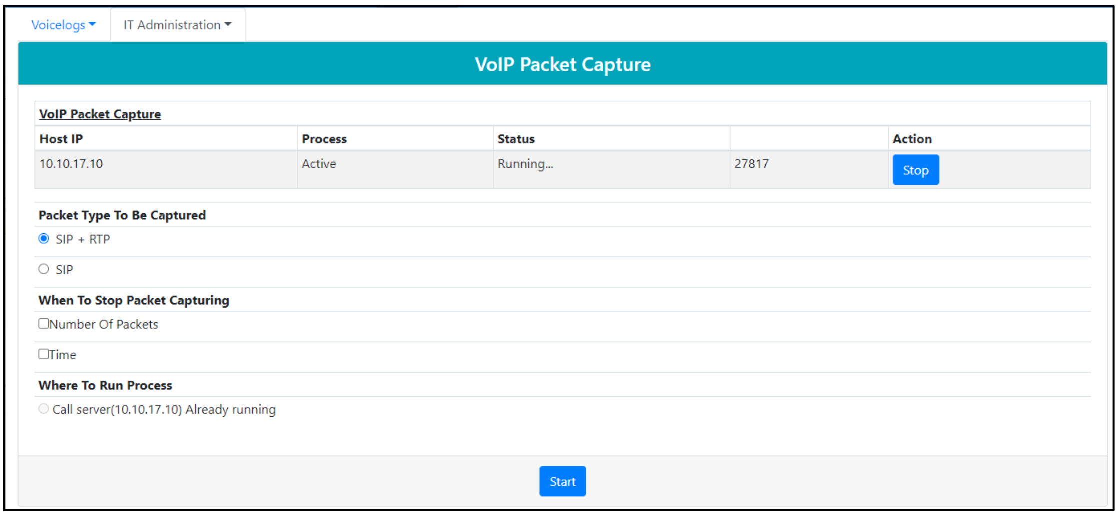


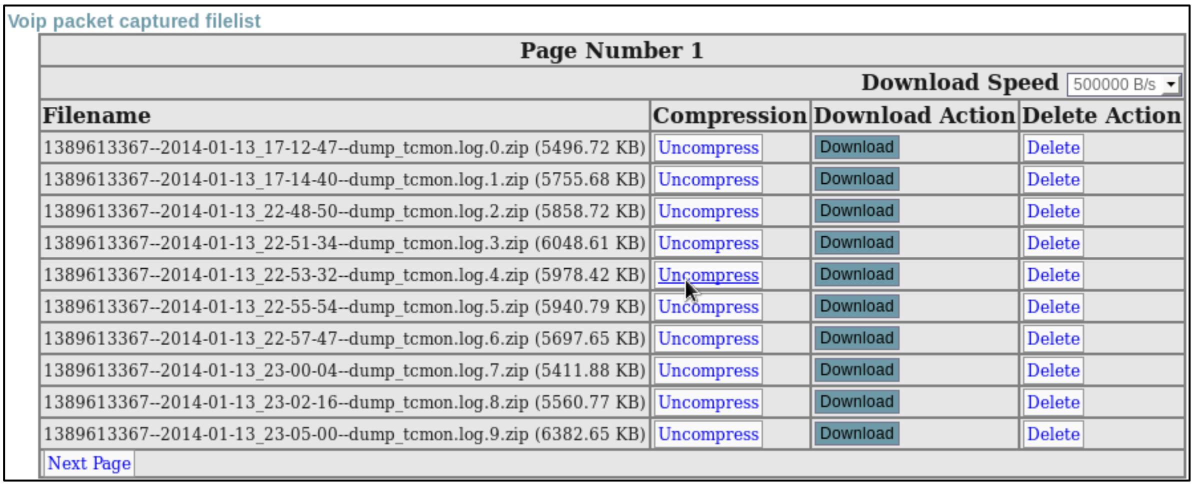
Figure: Configured VoIP Packet Screen

The administrator can click "Stop" button to stop the VoIP packet capturing.

18.4.1.1 Download view or analyze VoIP captured files

This feature allows the user to download tcpdump.zip files on the machine. After downloading, they can be used further for the analysis part. To view the downloaded .zip files, execute the following command.

cd /dacx/var/ameyo/dacxdata/debug/tclogs/


Voip packet captured filelist

Page Number 1

Download Speed 500000 B/s

Filename	Compression	Download Action	Delete Action
1389613367--2014-01-13_17-12-47--dump_tcmon.log.0.zip (5496.72 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_17-14-40--dump_tcmon.log.1.zip (5755.68 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_22-48-50--dump_tcmon.log.2.zip (5858.72 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_22-51-34--dump_tcmon.log.3.zip (6048.61 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_22-53-32--dump_tcmon.log.4.zip (5978.42 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_22-55-54--dump_tcmon.log.5.zip (5940.79 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_22-57-47--dump_tcmon.log.6.zip (5697.65 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_23-00-04--dump_tcmon.log.7.zip (5411.88 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_23-02-16--dump_tcmon.log.8.zip (5560.77 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_23-05-00--dump_tcmon.log.9.zip (6382.65 KB)	Uncompress	Download	Delete

Next Page

Figure: VoIP Captured Files

Following is the definition of some common elements used on this page.

1. **<u>Packet Types</u>:** Select any of the following packet type.
   A. **<u>SIP +RTP Type</u>:** It allows the user to capture the session as well as media packets for the analysis part.
   B. **<u>SIP Type</u>:** It allows the user to download only the session packets for the troubleshooting.

If there are multiple call servers, then select the call server IP on which the service has to run.

18.4.1.2 In Debugging Aspects

It allows the following features.

1. Download SIP Graph to verify the session progress based on the phone number or SIP CALL_ID.
2. It also allows the administrator to see the SIP flow in plain text mode.
3. Download RTP streams, including both files (Incoming and Outgoing voices) of Agent and Customer files. It also allows the user to download the related PCAP files from the same option.
4. It also allows the user to download the Voicelogs.

18.4.1.3 Searching specific Number to Debug

This page is used to search the number to debug SIP+RTP based on a phone number/SIP CALL_ID.

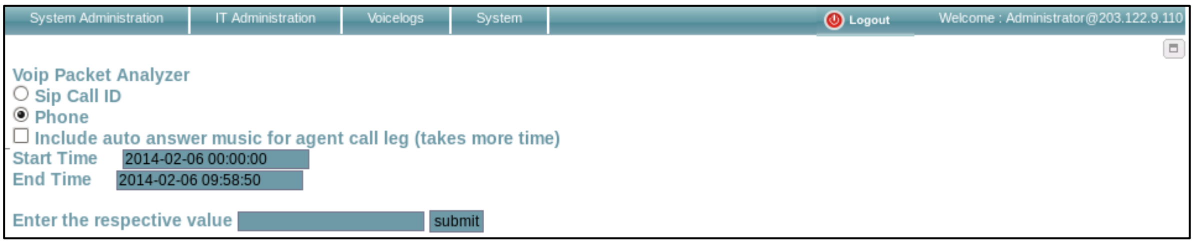
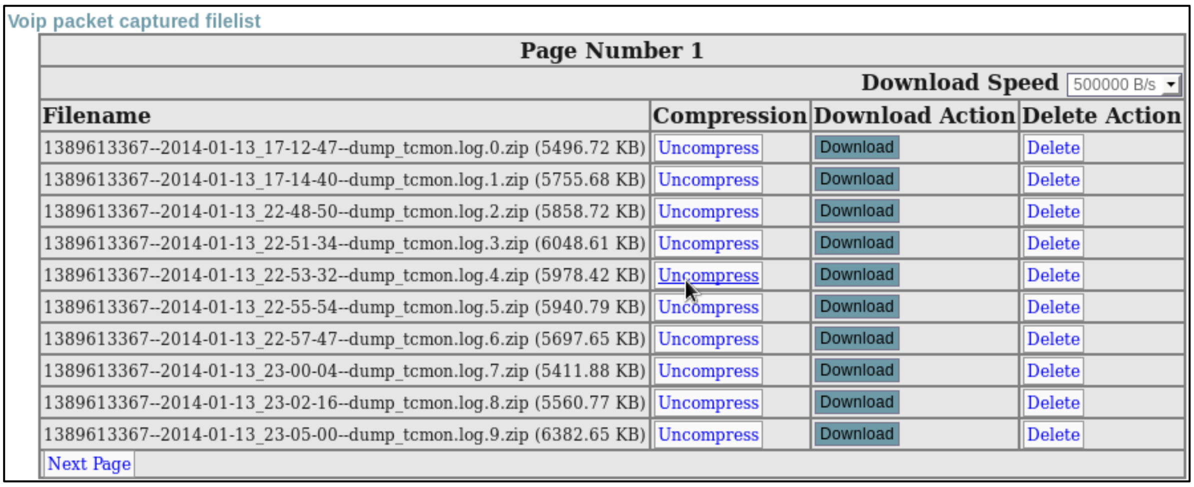


Figure: Installed

Once the user have entered all the relevant details, the user gets SIP flow in plain text mode, including the option to download the relevant files for further debugging.

The related files available to download t are listed herein below.

1. SIP Graph
2. RTP PCAP audio files(both files of Agent's and Customer's Incoming and Outgoing Voices)
3. Voicelogs



Voip packet captured filelist

Page Number 1			
		Download Speed	500000 B/s
Filename	Compression	Download Action	Delete Action
1389613367--2014-01-13_17-12-47--dump_tcmon.log.0.zip (5496.72 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_17-14-40--dump_tcmon.log.1.zip (5755.68 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_22-48-50--dump_tcmon.log.2.zip (5858.72 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_22-51-34--dump_tcmon.log.3.zip (6048.61 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_22-53-32--dump_tcmon.log.4.zip (5978.42 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_22-55-54--dump_tcmon.log.5.zip (5940.79 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_22-57-47--dump_tcmon.log.6.zip (5697.65 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_23-00-04--dump_tcmon.log.7.zip (5411.88 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_23-02-16--dump_tcmon.log.8.zip (5560.77 KB)	Uncompress	Download	Delete
1389613367--2014-01-13_23-05-00--dump_tcmon.log.9.zip (6382.65 KB)	Uncompress	Download	Delete
Next Page			

Figure: VoIP Captured File List

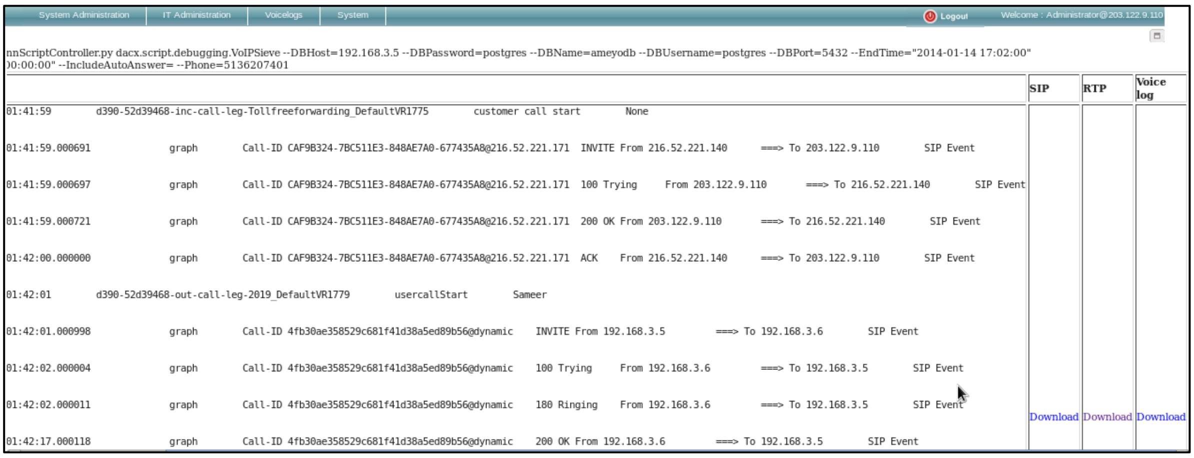
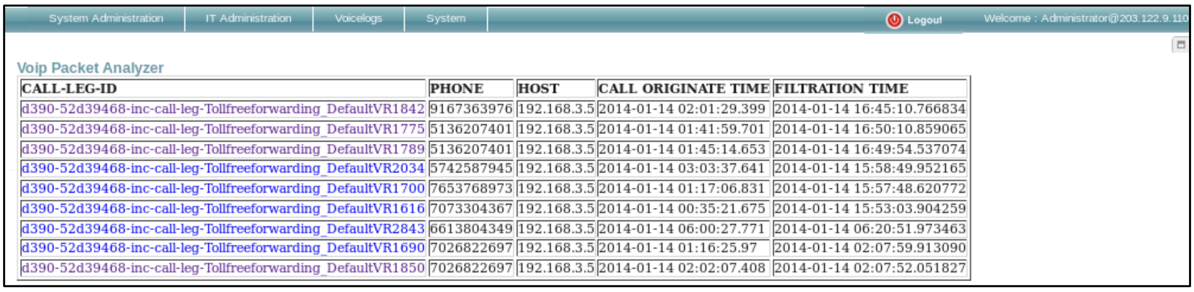


Figure: VoIP Graph

18.4.1.4 View Old Debugs

This feature allows the user to view the searched numbers again.



CALL-LEG-ID	PHONE	HOST	CALL ORIGINATE TIME	FILTRATION TIME
d390-52d39468-inc-call-leg-Tollfreeforwarding_DefaultVR1842	9167363976	192.168.3.5	2014-01-14 02:01:29.399	2014-01-14 16:45:10.766834
d390-52d39468-inc-call-leg-Tollfreeforwarding_DefaultVR1775	5136207401	192.168.3.5	2014-01-14 01:41:59.701	2014-01-14 16:50:10.859065
d390-52d39468-inc-call-leg-Tollfreeforwarding_DefaultVR1789	5136207401	192.168.3.5	2014-01-14 01:45:14.653	2014-01-14 16:49:54.537074
d390-52d39468-inc-call-leg-Tollfreeforwarding_DefaultVR2034	5742587945	192.168.3.5	2014-01-14 03:03:37.641	2014-01-14 15:58:49.952165
d390-52d39468-inc-call-leg-Tollfreeforwarding_DefaultVR1700	7653768973	192.168.3.5	2014-01-14 01:17:06.831	2014-01-14 15:57:48.620772
d390-52d39468-inc-call-leg-Tollfreeforwarding_DefaultVR1616	7073304367	192.168.3.5	2014-01-14 00:35:21.675	2014-01-14 15:53:03.904259
d390-52d39468-inc-call-leg-Tollfreeforwarding_DefaultVR2843	6613804349	192.168.3.5	2014-01-14 06:00:27.771	2014-01-14 06:20:51.973463
d390-52d39468-inc-call-leg-Tollfreeforwarding_DefaultVR1690	7026822697	192.168.3.5	2014-01-14 01:16:25.97	2014-01-14 02:07:59.913090
d390-52d39468-inc-call-leg-Tollfreeforwarding_DefaultVR1850	7026822697	192.168.3.5	2014-01-14 02:02:07.408	2014-01-14 02:07:52.051827

Figure: VoIP Debug

Once the PCAP files download, the user can open them in WireShark or TShark for the further debugging.

19. Administrator Account Menu

To access the Administrator Menu, click on the Administrator name icon at the top-right of the screen.

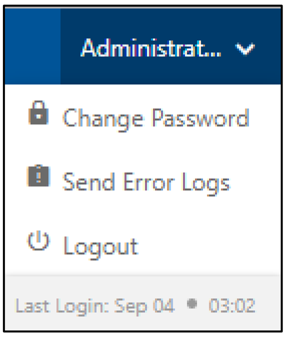


Figure: Administrator Account Menu

The Administrator can perform the following operations from the Menu tab:

1. **Change Password:** : This option allows the Administrator to change his account's password. Click on the "**Change Password**" button and provide your current password, then type new password two times to validate it.

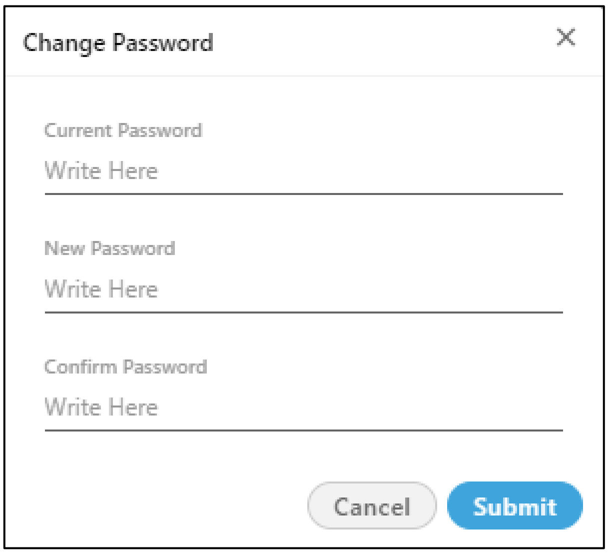


Figure: Change PasswordPop-up

2. **Send Error Logs:** It is a feature provided by the Ameyo to send the errors which occurred at the time of work. Click on the "**Send Error Logs**" button and the pop-up with the screenshot will arrive. Provide a description of that screenshot and enable "**Include Screenshot**" (optional) to attach the Screenshot with the error. After then click on the Send button to send that screenshot to the server. This will help the Administrator to resolve the error.

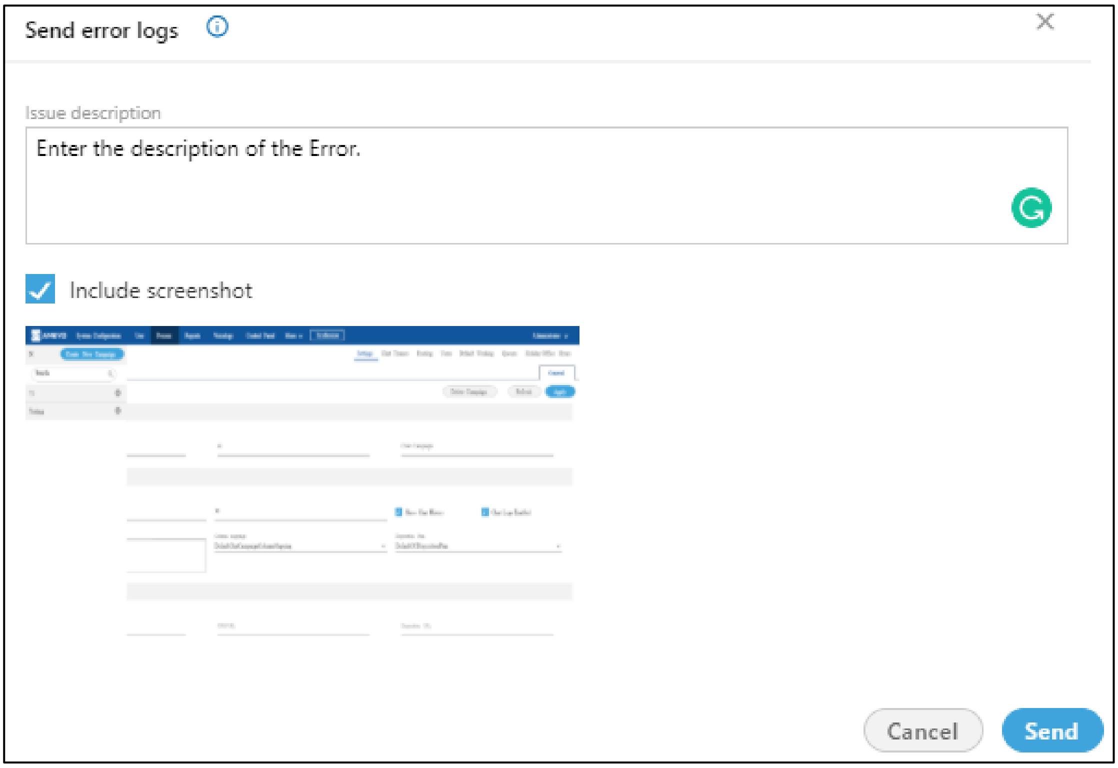


Figure: Send-Error-Logs

3. **Last Login:** It shows the last date and time of the administrator when the account has been logged in by administrator.

20. Administrator Logout

Click the user account menu on top-right corner and click "Logout" to logout from the Administrator Console.

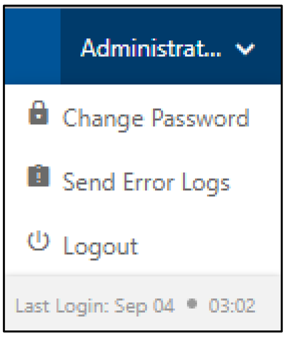


Figure: Logout