4_12_Agent_Manual

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1. Document Versioning

Version	Date	Purpose	Author
4.12.1-AgM	16-June-2021	First Draft	Saurabh Goyal

2. Login at Ameyo

The Agent has an access to web based interface with telephony controls through which the agent can make or receive calls. When the agent receives a call, a CTI pop-up will appear containing the information of customers.

Perform the following steps.

1. To login into Agent screen, the user needs to open following URL.

```
<PORT>://<HostName_OR_IP>:<PORT>/app/#
```

Replace the following variables.

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

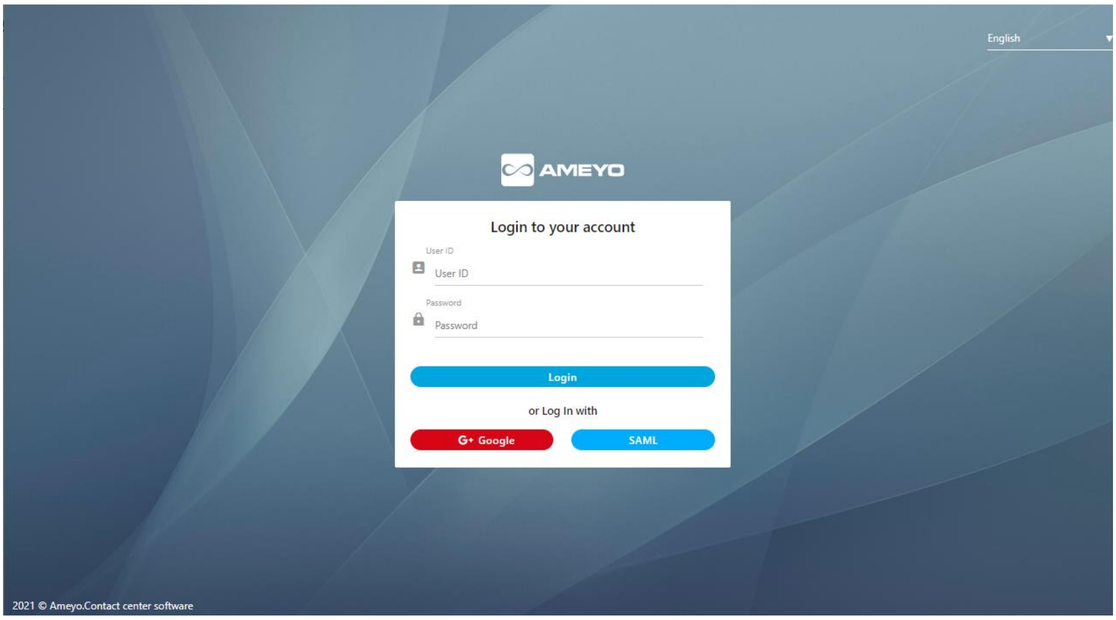

Figure: Login Screen

2. Use any of the following methods to login.

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

   B. **Login with SAML (Licensable):** Click "SAML" to login with your SAML Account hosted at your IDP (Identity Provider).

   Security Assertion Markup Language(SAML) is an XML-based framework for user authentication. Using it, the user authentication can be done with a third-party Identity Provider (IDP) such as Active Directory.

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

   Click "Google" to login with your Google account.

   Both SAML and Google Authentications are licensable features and has to be configured from the backend. In the absence of both license and configuration, these options will not be visible on the logon screen.

3. After user logins at the Portal using any of the above methods, a **"Campaign Selection"** pop-up is displayed on the screen.

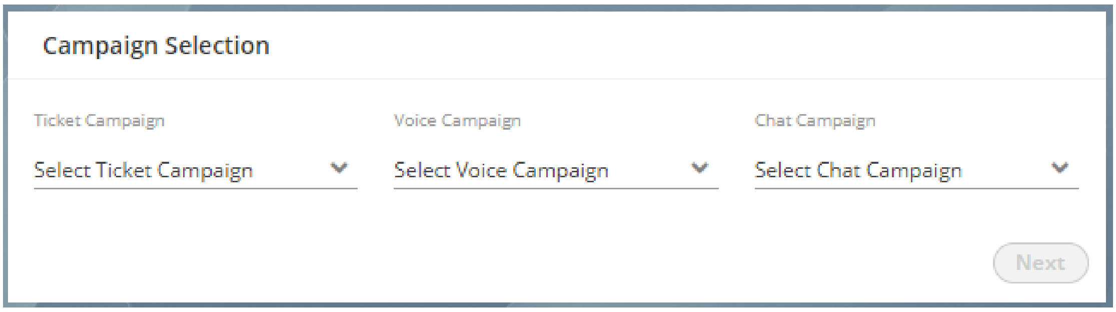

Figure: Select the Campaign

4. Here, the agent has to select any of the following campaign types in which it wants to login. The list will contain only those campaigns in which the agent has been assigned by the Administrator.

3.

- Ticket (Interaction) Campaign
- Voice Campaign
  - Inbound Voice Campaign
  - Outbound Voice Campaign
  - Parallel Predictve Voice Campaign
- Chat Campaign

The Agent can login to multiple voice campaigns, but the agent can select only one interaction campaign and one chat campaign. The agent can not select multiple interaction campaigns and chat campaigns at a time.
If Administrator have configured the default working for an agent in any campaign, then that agent will be logged in directly to that campaign. Professional Agent can be set to logon to one voice, one chat, and one interaction campaigns. Whereas, Executive can set to work in two voice, one chat, and one interaction campaign.

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4. **Working Mode Selection:** If the administrator has configured the Working mode selection, then the agents upon logon to their console, have to select the working mode. The selection of the working mode for an agent is mandatory. The agent will have to select the working mode status after the login screen. There are two following working modes from which the agents can select:
   - **WFO (Work from Office):** The agents who are working from Office, have to select this working mode option.
   - **WFH (Work from Home):** The agents who are working from home, and is enabled with Ameyo remote solution, have to select this working mode option.

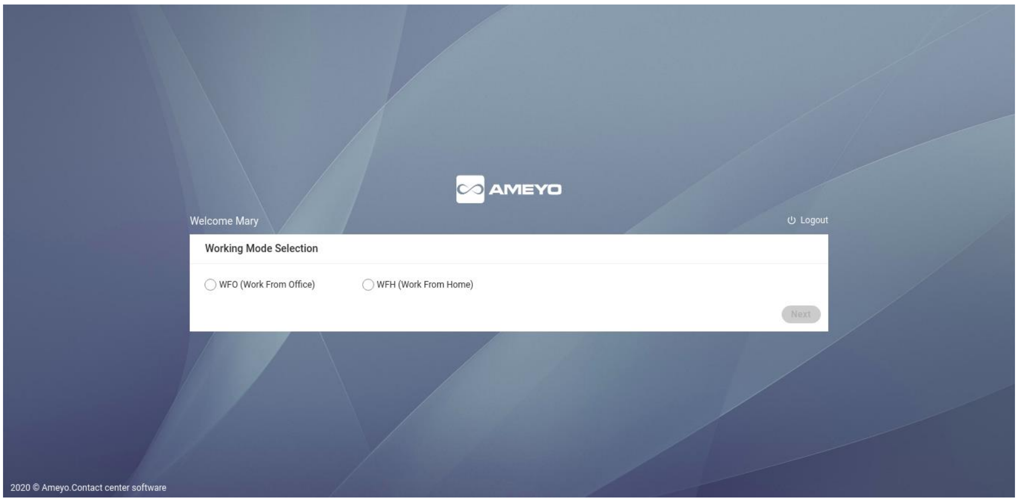

Figure: Select Working Mode Status

5. **Selection of Campaign:** The agent can select either voice campaign or interaction campaign but the agents who are assigned in both type of campaigns can select both campaigns at a time and can work in either campaign. Following are the cases for campaign selection for the agent.

5.

   A. **Blended Campaign / Voice Campaign:** The Administrator can configure blended campaign for voice, which allow an agent with Executive Role to logon to more than one voice campaigns (such as in both Inbound and

Outbound campaigns) simultaneously. If this option is configured, a checkbox named "Blended Campaign" appears in the campaign selection.

The agent with "Professional Agent" will not get the option of Blended Campaign as the Professional Agent can login to only one voice campaign at a time.

When "Blended Campaign" option is unchecked, the voice campaign drop-down menu shows only those campaigns, which are not blended by the Administrator.

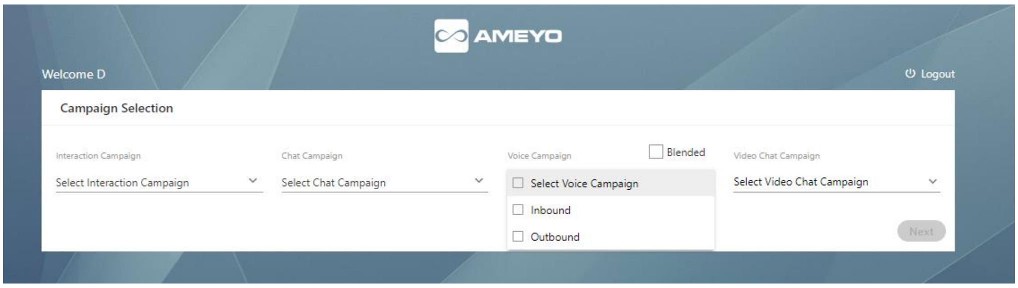

Figure: Voice Campaign Selection

When "Blended Campaign" option is checked, the voice campaign drop-down menu shows only blended campaigns, in which the agent is assigned.

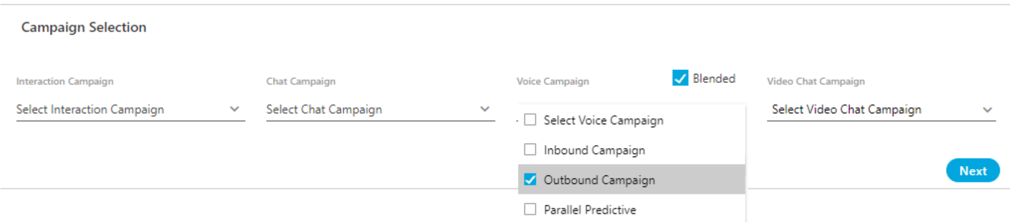

Figure: Selecting Blended Campaigns

An agent with "Executive" role can select multiple non-Blended Campaigns. However, Blended Campaigns are preferred because it gives important to the inbound calls that helps in reducing the call drops.

The agent (with Executive Role) can select more than one voice campaigns, a Ticket (Interaction) Campaign, and a Chat Campaign, in which it want to login simultaneously.

B. **Interaction Campaign:** The agent can select the interaction campaign in which the agent is assigned. In interaction campaign both interaction and chat campaigns are included. The agent can select any one from interaction campaign or chat campaign or if the agent is assigned in both campaigns then, the agent can select both interaction and chat campaigns at a time.

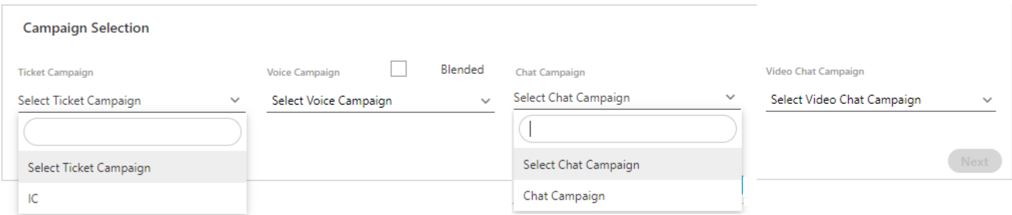

Figure: Select Interaction Campaigns

The agent can select only one interaction campaign and chat campaign. If the agent is assigned in multiple interaction campaigns, even then, agent is cannot select multiple campaigns.

C. **Selection of both Voice and Interaction Campaigns:** The agent who is assigned in both voice and interaction campaigns can select both at a time.

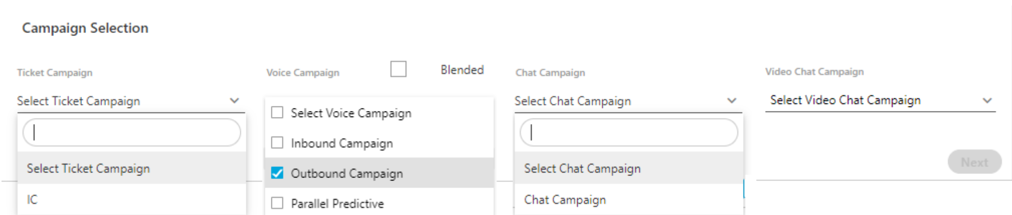

Figure: Voice and Interaction Campaign Selection

D. **Selection of Video Chat Campaign:** The agent can select the video chat campaign in which the agent is assigned into.

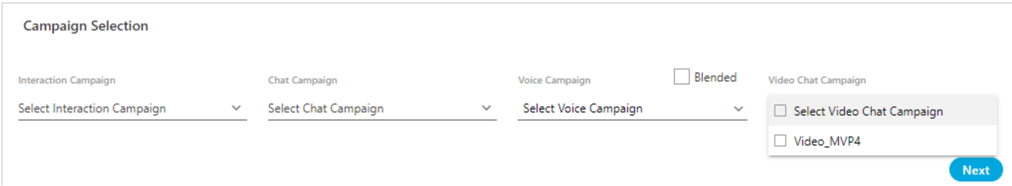

Figure: Video Chat Campaign Selection

Video Offering is non-GA'ed from Ameyo in 4.11 release. However, it can be available to the user on special requests. The agent can also select the video chat campaign with voice and interaction campaign to work simultaneously with those campaigns.

6. Click "Next" to proceed.

Case 1: Extension Selection by Agents: Now, if the extensions are configured for the agents in softphone or hardware-phone and if the Administrator has set the agents to select the extensions, then following pop-up is displayed on the screen.

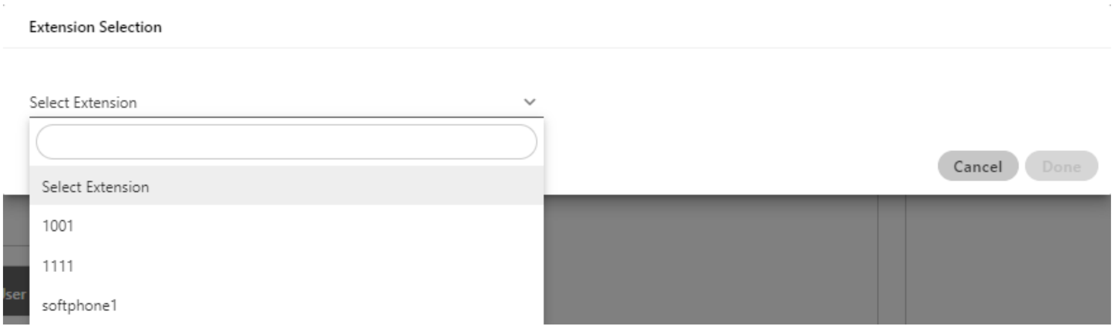

Figure: Extension Selection

Click the drop-down menu and select the extension. If you are selecting a phone , then a new field appears that asks to provide the phone numnber.

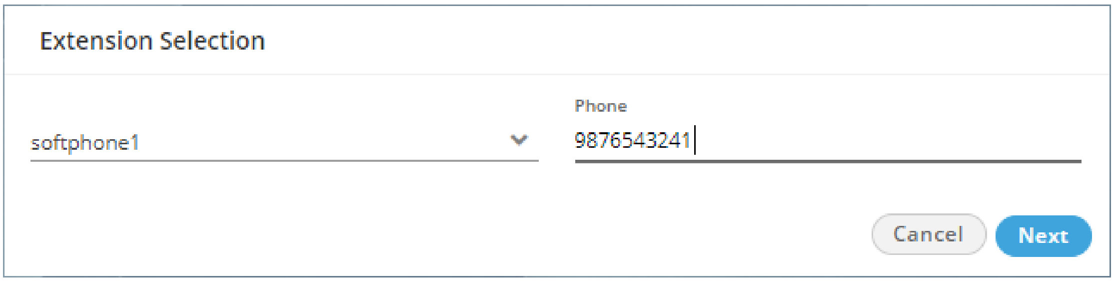

Figure: Entering Number after selecting Extension

Click "Next" to proceed.

Case 2: No Extension Selection: The Extension Selection pop-up will not appear after the user logon, if WebRTC is being used in the system or if the Administrator had selected to use "User ID Mapped Call Leg Details Provider" Mapping Policy in the System Settings.

WebRTC: In case of WebRTC, the agents will be logged on just after the campaign selection. Once the agent is logged in to Ameyo System, the agent needs to ensure that WebRTC status indicator turns "Green" (WebRTC is registered) after a few seconds. If the WebRTC status indicator remains "Red", then it shows that WebRTC is not registered and the agent will not be able to make or receive calls. It is suggested to contact your Administrator immediately if WebRTC remains "RED" for a longer duration.

Now this, WebRTC indicator can be seen by clicking on  icon to access a small telephony pop-up, that will slide from right. Here, an agent can see if the WebRTC indicator is "red" or "green".

Auto-Extension Selection Settings: In case the Administrator had selected "User ID Mapped Call Leg Details Provider" mapping policy, the already selected extensions (by the Administrator) will be assigned to the agents.

If you does not choose the extension from the above bar, then after login, the Ameyo starts showing a cautionary error to select the extension.

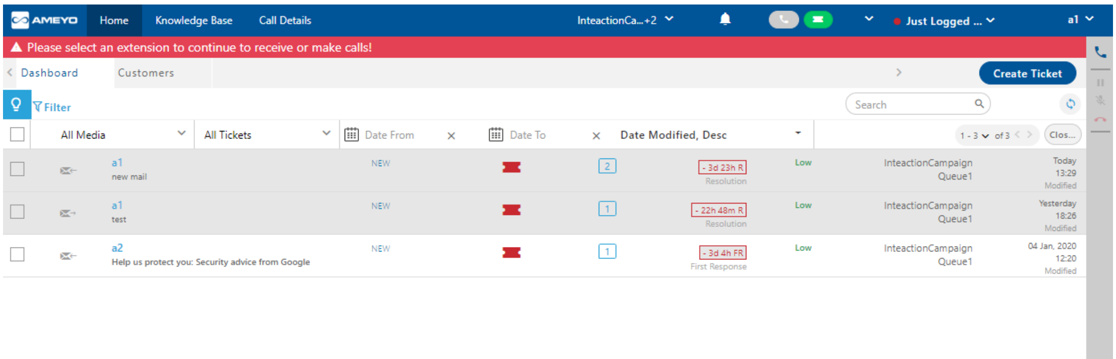

Figure: Dashboard with Cautionary sign

If you missed to select the extension in the above step, then you can select it from here by clicking onto this cautionary sign. The extension selection bar again pops up and you can select the extension from here.

7. Enter the phone number and click "Next" to proceed. After the user logged-in, it shows the Home Screen.

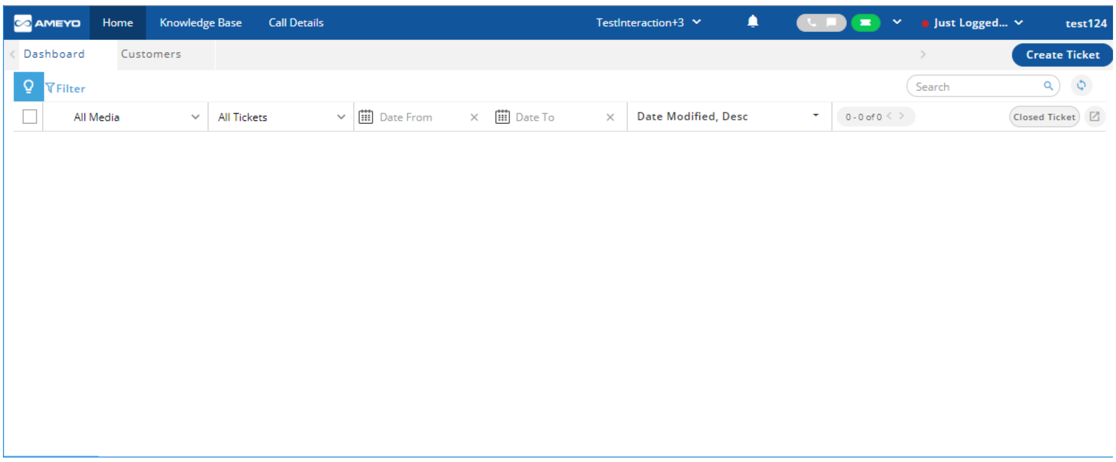

Figure: Home Screen

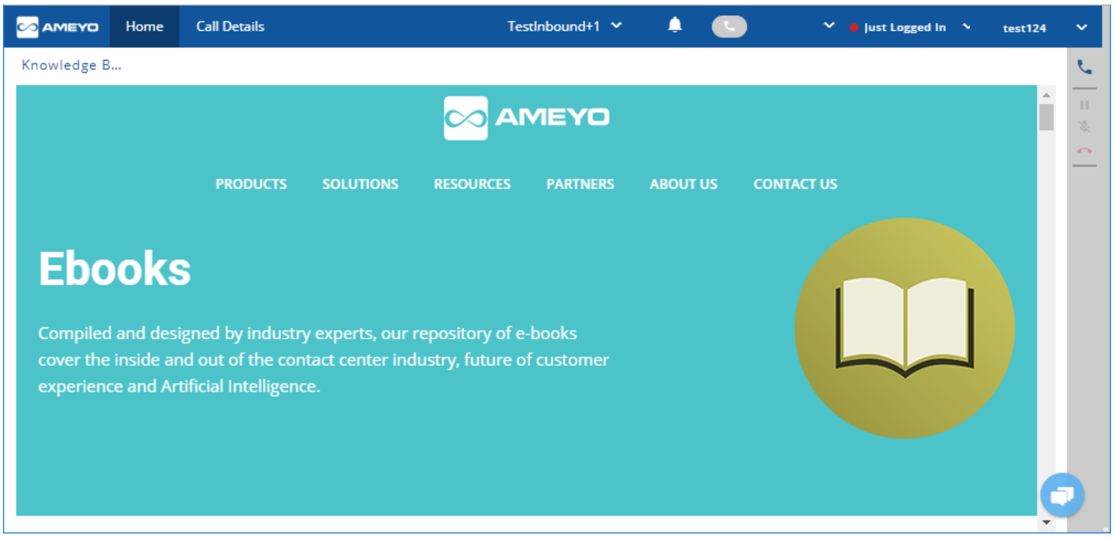

Figure: Home Screen of Agent in Voice Only

The licensable word is added for the licensable features in this user manual. If the appropriate license is not available then that feature will not be visible in the user interface to the user.

3. Set Agent Availability

1. Once the agent is logged into Ameyo System, the agent needs to ensure that WebRTC status indicator turns "Green" (WebRTC is registered) after a few seconds. If the WebRTC status indicator remains "Red" then it shows that WebRTC is not registered, and the agent will not be able to make or receive calls. It is suggested to contact your Administrator immediately if WebRTC remains "RED," for a longer duration.

2. Click  to access the WebRTC pop-up in the top-right corner.

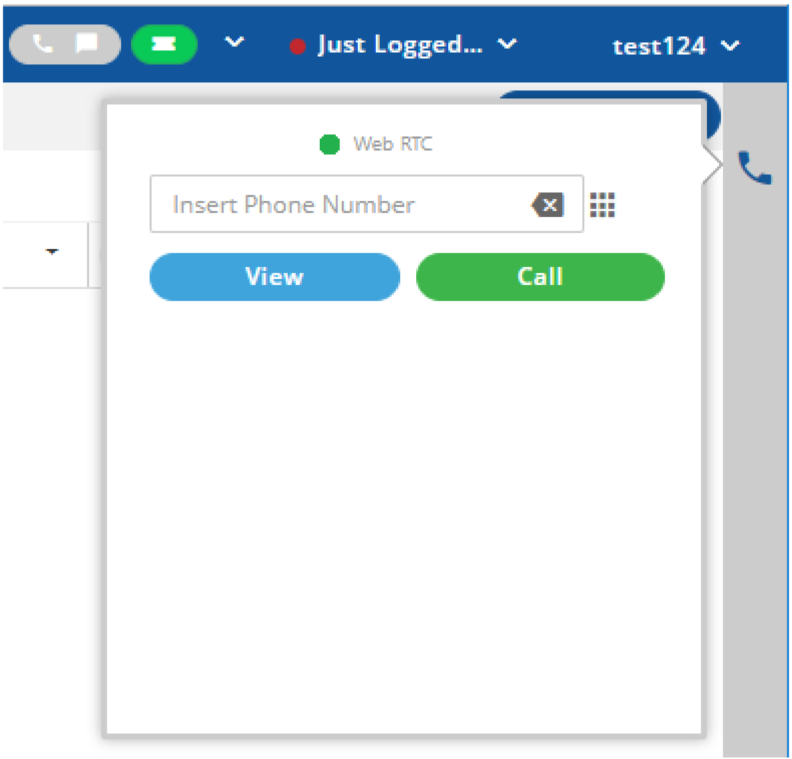

Figure: WebRTC Pop-up

Here, the agent can see whether WebRTC indicator is green or red.

3. The Agent Status is a helpful way to monitor the agent login status for the supervisor or administrator. After the login, the agent has to change his current status from "Just Logged In (Unavailable)" to "Available".

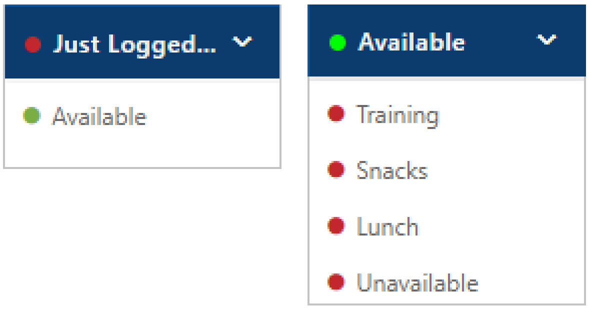

Figure: Agent Status Options

This menu shows the current status of whether the agent is available to make or receive calls else the calls should be routed to other available agents by the system.

These are custom default breaks that have been set by the Administrator. These breaks will help the Supervisor to identify which Agents are available for work and which are not. Some of the basic breaks which are used here are:

- **Lunch:** If an Agent is on the Lunch and will not be available for the next couple of minutes, then he can set his status to Lunch.
- **Snacks:** It's kind of a short break, which refers that the Agent on break and will be available in a short time.
- **Training:** When the Agent has been in the Training and will not be available for some time, it may be of a couple of hours, then he can set his status on Training.
- **Un-Available:** When the Agent will not be available for next some time due to any of the reason, then he can set his status to unavailable.

4. Agents can change their status at any time using the first drop-down menu on the top right corner. The supervisor will get to know the agent status from the monitoring tab if any agent changes the status.
5. The Administrator can modify to add more status options (such as Short Break, Team Meeting, and others) so there can be more options apart from the default ones that are already available.

6. Here, you will also notice the following campaign icons.

- Voice Campaign Icon
- Chat Campaign Icon
- Interaction (Ticket) Campaign Icon

7. The agent can click the campaign icons to turn on or off the campaign mode.

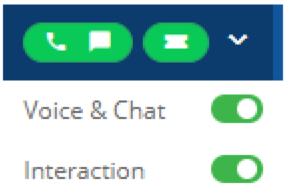

Figure: Turn on or off Auto-mode for Chat and Voice Campaigns

Figure: Turn on or off Auto-mode for Voice Campaign

If the agent is logged in to multiple voice campaigns, then turning on auto-mode on will make it available in all voice campaigns.

8. Click the toggle switch to turn on or off the auto-mode for campaigns. After turning off, the campaign icon and its toggle switch are displayed in gray color.

If the Administrator had configured that the agent cannot set the Interaction Campaign to auto-off, then the toggle switch of Interaction Campaign is displayed in the blue color. The agent will always remain available in the Interaction Campaign with this always-on toggle and cannot turn it off.

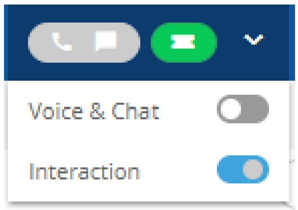

Figure: Force Auto-on for Interaction Campaign

9. With the campaign icons, the list of campaigns in which the agent is logged in can be accessed.

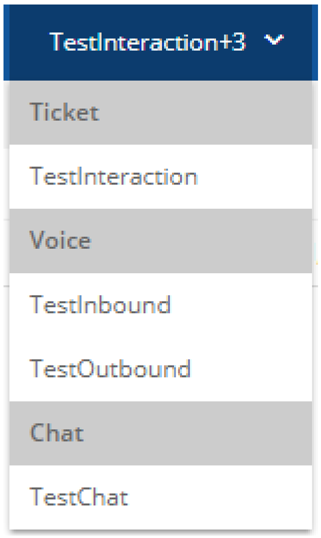

Figure: List of Campaigns

10. Click  icon on the right bar and a small telephony pop-up slide from the left. Here, the agent can see if the WebRTC indicator is "red" or "green".

4. Agent Console

After logging in, the agent can access its console. The Console allows the agent to view real-time information of the tickets assigned to him/her.

4.1 Agent Login at First Time

In the agent interface, if the Agent is logged in for the first time with the Interaction Campaign then the Dashboard shows all tickets created while interacting with the customers through any medium.

In Agent's Dashboard, if the applied filter and conducted search do not have any result, then the screen comes as blank.

The following message will be displayed (marked in the green box) when the applied filter or conducted search do not have any resultant ticket to show on the screen.

```
This filter/search has no result. Please try a different criteria.
```

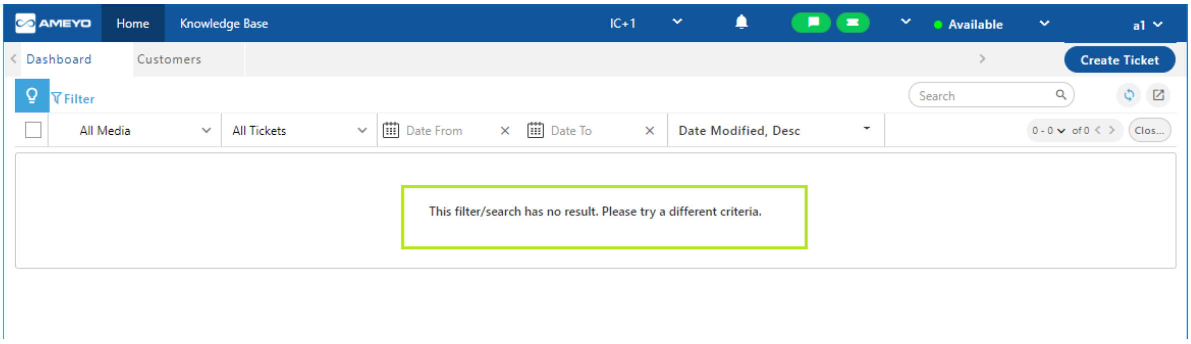

Figure: First-time Dashboard

If the agent is logging the dashboard another time and the tickets have already been created or raised by the customers, then this screen and message will not appear.

4.2 Login Dashboard another Time

If the Agent is logged in for the second time with the IC Campaign, then the Dashboard shows all tickets created while interacting with the customers through any medium.

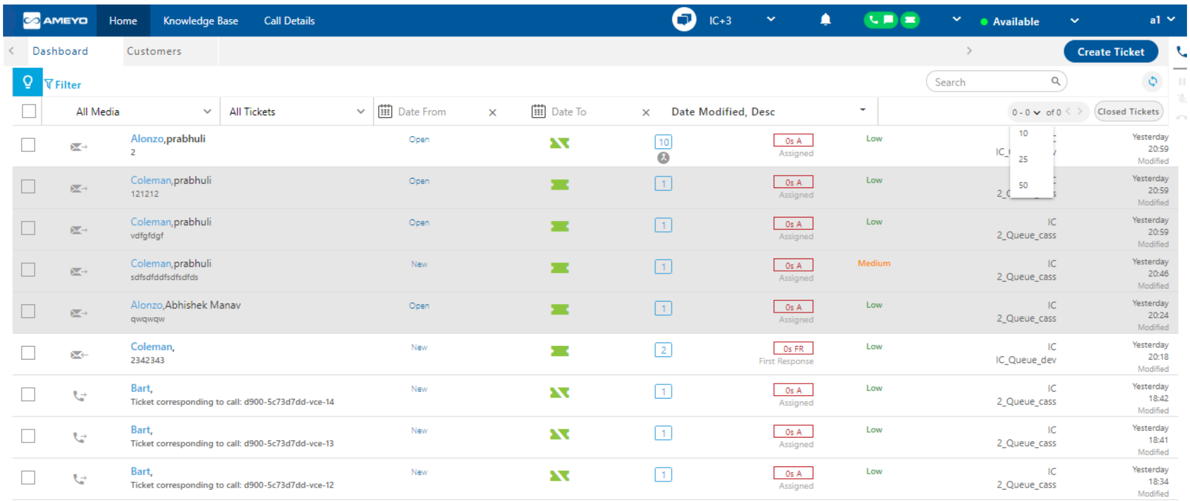

Figure: Dashboard

The interface of agent Console can be divided into the following sections.

1. Home Tab
2. Customers
3. Knowledge Base

4.3 Home

The home tab is divided into two internal tabs:

4.3.1 Dashboard

The Dashboard of the agent's console allows the agent to view the tickets, work on them and reply to the customer. Know more...

4.3.2 Customers

The agent can view the list of all the customers present in that queue of the campaign in which the agent is assigned. The agent can also view the information of the customers from here. Know more...

If an agent navigates through the internal tab of Home menu, then the internal tabs will not be reloaded. This helps the agent to navigate between internal tabs without loosing the entered information.

4.4 Knowledge Base

The Knowledge Base of the agent's console allows the agent to navigate to the organizations knowledge base. This knowledge base is configured by the organizations according to their business needs.

4.5 Call Details

The agent can view the details of his calls through the call details tab. The agent can view both Callbacks and Call Details from here. Know more...

5. Dashboard

5.1 Dashboard

The working and features of Dashboard page is similar for both Supervisor and Agent. However, the Group Manager does not have the privileges to access the Dashboard, as the group manager is not allowed to work in interaction and chat campaigns.

5.1.1 Login Dashboard

After the logon to the agent's console with the IC Campaign, then the Dashboard shows all tickets created while interacting with the customers through any medium.

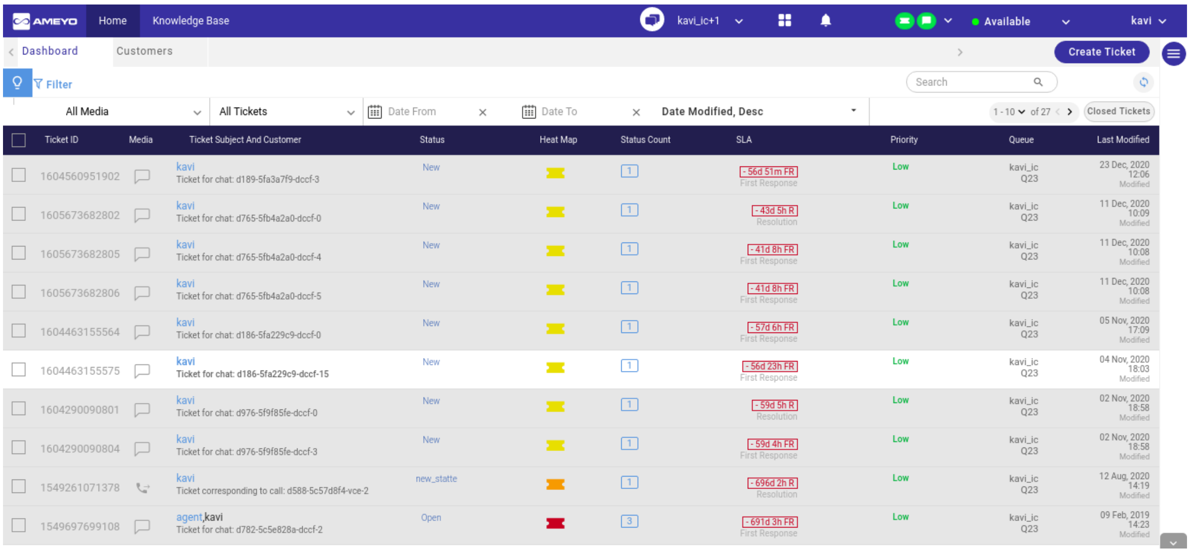

Figure: Dashboard

Here, the agent can perform the following operations.

The key difference between the supervisor and agent is that the supervisor can see all the tickets present in the campaign whereas, the agent is allowed to see the tickets present in that queue on Dashboard.

5.1.2 Smart Mode

Click icon to turn on the smart mode. In smart mode, the agent can see what tickets have to be dealt with first. Agent can click "Smart Mode" icon again to turn it off. Know more...

5.1.3 Filter

Click Filter icon to filter the tickets on the dashboard using the following pop-up.

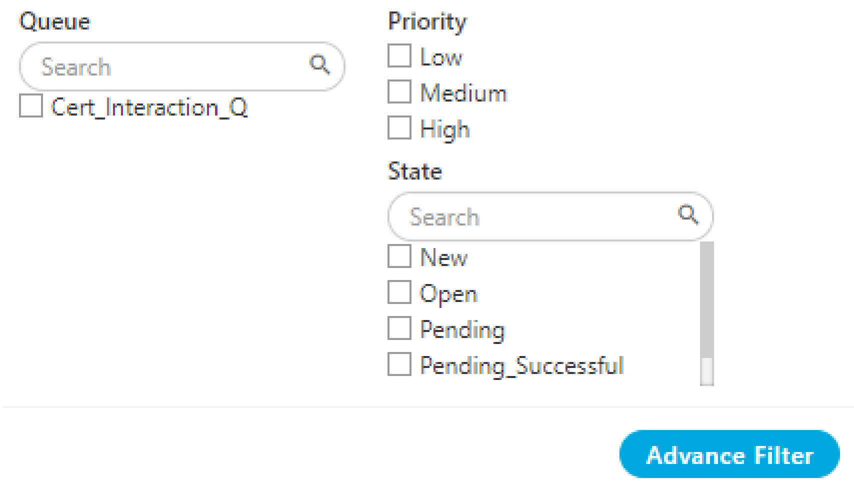

Figure: Filter Box

You can filter the tickets from the following list of available filters.

1. **Queue:** Enable the checkbox of the queue for which you want to search the tickets. The agent can select multiple queues at the same time. You can search the queue name, enter the queue name in the search box and press "Enter" key.
2. **Priority:** Agent can filter the tickets based on their priorities. Enable the checkbox of the specific priority.
3. **State:** Agent can apply the filter on the ticket states as well. Ticket state defines the current state of the ticket in which it lies at present. You can search the state by typing the state name in the search box.

After the selection of the filters, click "Apply" button.

5.1.3.1 Advanced Filter

You can click "Advance Filter" to create an advanced filter.

For the advanced filters, click "Advance Filter" button present at the bottom of the filter section.

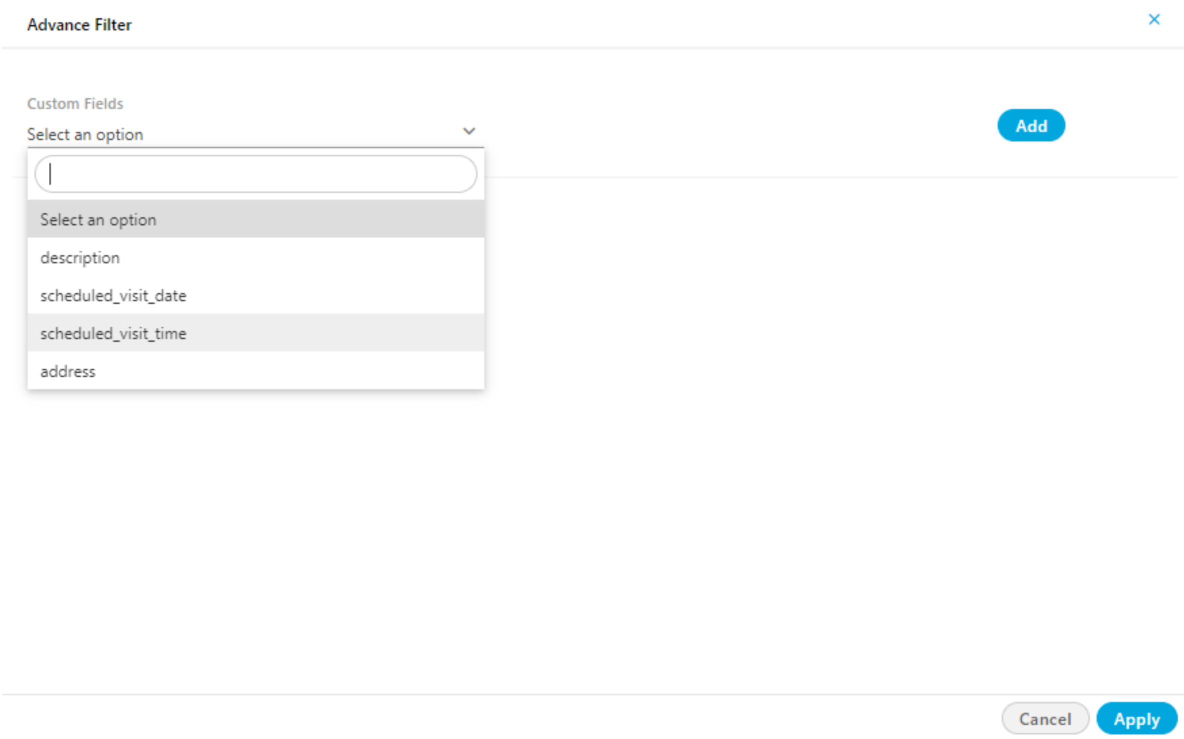

Figure: Advance Filter Box

On the new pop-up page, select the custom filters from the drop-down list, based upon your criteria and the usage and click "Apply" button. It filters the tickets based upon the custom fields.

The Advance Filter can be enabled or disable from back-end, hence if it is disabled it will not be visible on the filter tab.

5.1.4 Ticket Assignment Notification

In a case when some of the tickets have been assigned to the agents, then it is important to notify the agents about the tickets and the total count of tickets. To solve this problem, a notification comprises of the total count of the tickets will be sent to the agent. Know more...

5.1.5 Chat Delivery Notifications

In case when the agent is assigned in a Chat Campaign, but the agent is on another secondary tab in the Web browsers, there were chances that the agent will miss the incoming chat. To avoid such cases, Desktop Notification App has been improved further. Now if the agent is browsing other tabs (instead of Primary Tab) in Web browsers, then a desktop notification is displayed informing about a new incoming chat. The agent can click the notification to reach the Primary Tab to attend the Incoming Chat.

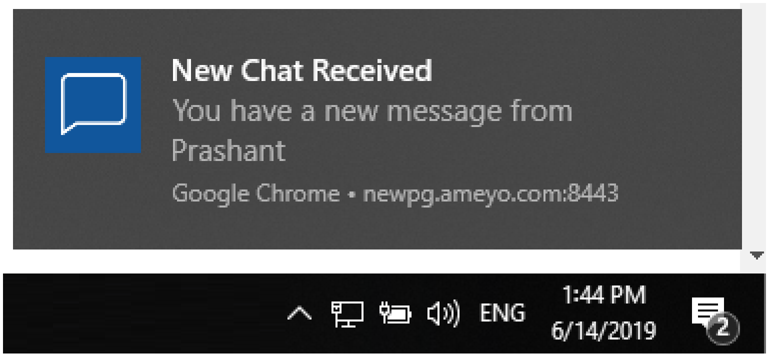

Figure: Desktop Notification for New Incoming Chat

If the agent does not click it, this notification will continue to show the incoming messages from the customer. In an operating system like Windows 10, the notifications will be displayed in Windows' native Message Center. Refer to the following screenshot.

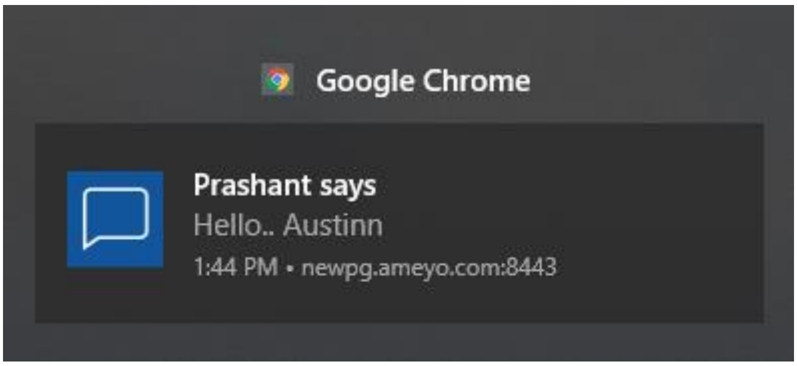

Figure: Desktop Notification for New Message in the Incoming Chat

This feature of"Desktop Notification" App helps the agent to attend the chat within SLA and decreases the chances of not connected chats.

5.1.6 Search Tickets

The agent can use the search box, located on the right corner to search for the tickets.

The agent can use the Custom ID also to search for the tickets. Enter the custom id of the ticket to search the ticket associated with that custom id. Tickets can only be searched with the help of Custom ID, if custom id is enabled by the administrator.

Computation of Tickets: While searching large number of tickets, the computation of ticket searching is performed on the server-side. Therefore, there will be no effect on the client-side. It has optimized the performance of Ameyo to handle the large number of tickets. And hence, the time consumption for fetching these tickets is reduced.

5.1.7 Refresh

Click icon to refresh the view of the dashboard.

5.1.8 Create Ticket

Click "Create Ticket" button to create a new ticket manually.Know more...

5.1.9 Row Filters

There are some filters that can be used to sort the tickets. It helps the user to see the tickets according to the usage and need. Following are the types of filters.

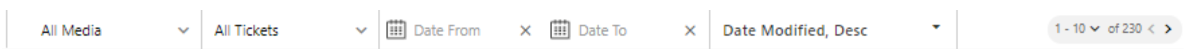

Figure: Filter Row

1. **Media Type Filter:** The media type filter helps the agent to filter tickets according to different media created in the system. Click on the type of media for which you want to see the tickets. Some of the following media are:

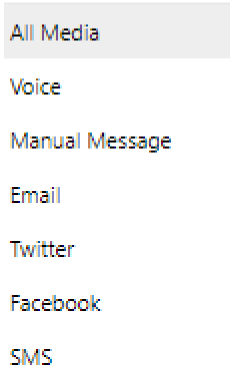

Figure: Media Type Filter

A. **<u>All Media</u>:** It shows all the types of tickets irrespective of the media type.

B. **<u>Voice</u>:** It shows the tickets which are created from the voice calls.

> Voice tickets can only be shown if the setup is based on IC+Voice setup.

C. **<u>Email</u>:** It shows all those tickets which are created through the email media profile.

D. **<u>Facebook</u>:** It shows all those tickets which are created through the Facebook media profile. It includes the messages sent as the post on Facebook page of the customer.

E. **<u>Twitter</u>:** It shows all those tickets which are created through the twitter media profile.

F. **<u>Manual Message</u>:** It shows those tickets which are created manually, which means those tickets which are created by the user.

G. **<u>SMS</u>:** It shows those tickets which are created through the SMS medial profile.

H. **<u>WhatsApp</u>:** It shows those tickets which are created through the message sent on the configured WhatsApp number.

I. **<u>Fb Messenger</u>:** It shows those tickets which are created through Facebook messenger. It includes the messages sent over the Facebook messenger.

> Here, the media profile means the type of source from which the ticket is received in Ameyo.

J. **<u>Customer Portal</u>:** It shows those tickets which are created or updated through the customer portal.

2. **<u>Ticket Status Filter</u>:** Agent can filter the tickets according to the various following ticket status.

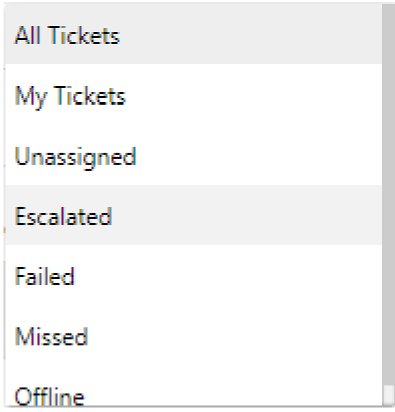

Figure: Filter Based on Ticket Status

A. **<u>All Tickets</u>:** It shows all those tickets which are assigned in the particular queue in which the user is assigned.

B. **<u>My Tickets</u>:** It shows only those tickets which are assigned to the user.

C. **<u>Unassigned</u>:** It shows those tickets which are unassigned and are still waiting for their response.

D. **<u>Escalated</u>:** It shows those tickets which have been escalated from any of the users in that queue.

E. **<u>Failed</u>:** It filters those tickets which are failed and not yet delivered to the customer. This case may arise when either the customer's destination id is incorrect, or the message delivery fails due to some external effects like network failure, provider issue and so on.

F. **<u>Missed</u>:** It filters those tickets for which the customer left the message for the agent, but the agent was not available to attend the ticket while the customer was available, and the message or chat has been missed.

G. **Offline:** It shows those tickets that have been raised when all the agents were offline or during the non-working hours.

3. **Date Filter:** The date filter helps you to filter the tickets based on the provided time duration. It shows all the tickets which are created in the provided time duration.

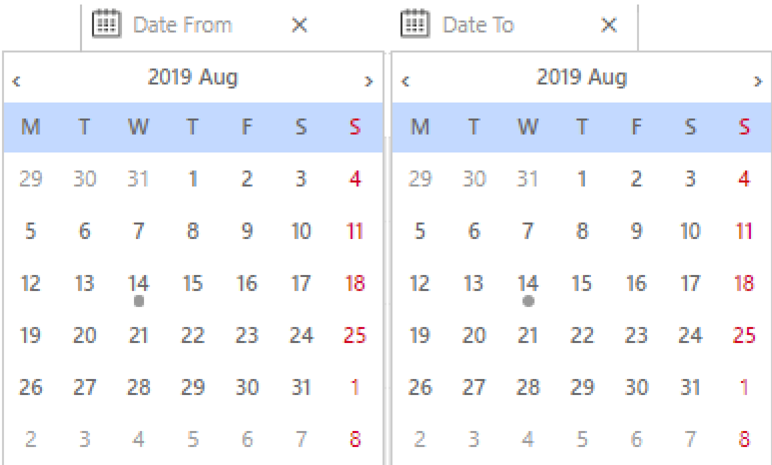

Figure: Date Filter

Select the initial date from "Date From" column and last date from "Date To" column.

4. **Ticket Sorting Filters:** The sorting filter helps the agent to filter the tickets in the following sorting orders.

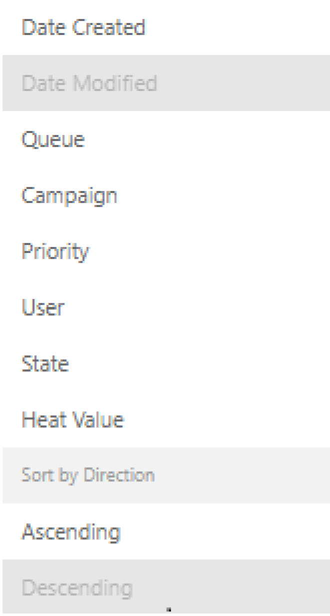

Figure: Sorting Filter

A. **Date Modified:** It sorts the tickets according to the modification date of tickets. If there is any task performed over the ticket, then the time and date are known as modification date and time. The date modified metric will be updated with the following activities .
   - When agent views the ticket
   - Activity when a new ticket is being created.
   - When an agent picks the ticket
   - Assignment/Un-assignment/Re-assignment of the ticket.
   - If ticket is being "escalated"
   - When the ticket is being transferred.
   - When agent "link" the ticket with other ticket.
   - When ticket is "merged"
   - Agent replies to a ticket
   - Adding/deleting/updating a "note"
   - Adding or deleted an attachment
   - Change in the Ticket Status
   - Adding/Updating/Deleting a custom field

B. **Date Created:** It sorts the tickets according to the creation date of tickets.

C. **Queue:** It sorts the tickets according to the queue names.

D. **Campaign:** It sorts the tickets according to the campaign names.

E. **Priority:** It sorts the tickets according to the priority of the tickets.

F. **User:** It sorts the tickets according to the name of the users.

G. **State:** It sorts the tickets according to the states of tickets.

H. **Heat Value:** It sorts the tickets according to the heat value of tickets.

I. **Sort by direction:** All the above sorting filters are based on the order of the tickets in which they can be shown on the page. The sorting parameters are compulsory to apply with all the above sorting parameters. There are two types of sorting directions.

- **Ascending:** It sorts the tickets in the ascending order, that is, the oldest ticket (according to the above-applied filter) comes first, and the new ticket comes at the end of the tickets list.
- **Descending:** It sorts the tickets in the descending order, that is, the newest ticket (according to the above-applied filter) comes first, and the oldest ticket comes at the end of the tickets list.

5. **Number of Tickets per Page:** It shows the total number of tickets to be shown per page. CLick icon to select the number of tickets to be shown on a single page. By default, 10 tickets show on a single page. Click icon to move to the next page of tickets or icon to move to the previous page of tickets.

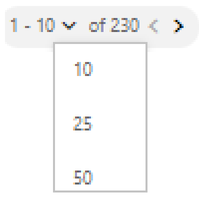

Figure: Tickets on Single Page Filter

5.1.10 Attach Call Tickets

The agent is able to attach the call Tickets with existing tickets or can create a new ticket. Know more...

5.1.11 View Closed Tickets

The agent can now see the closed tickets at the Customer Details page. Click "Closed Tickets" button to see the closed tickets. Know more...

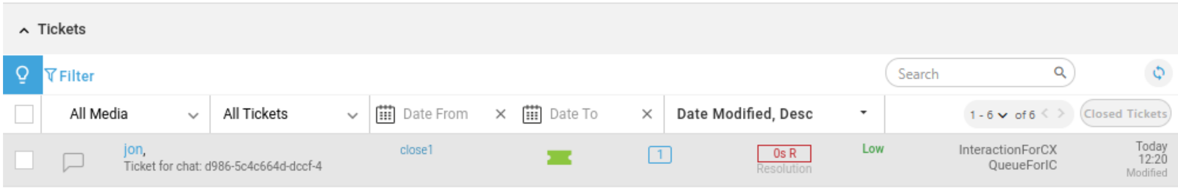

Figure: Showing Closed Tickets

The currently opened tickets will not be visible while viewing the closed tickets. The user has to close the dashboard of the closed tickets to see other tickets.

5.2 Ticket Assignment Notification

Whenever a ticket is assigned to the agent, then it is very important to notify the agent about the ticket assignment and the count of the tickets that have been assigned to the agent. Suppose the agent is on another tab browsing through the Knowledge Base or CRM, then the agent will not notice such notifications. Also, if the agent is on the same tab that displays the Agent Console, but the agent is receiving multiple notifications of different purposes, then the agent might not notice the ticket assignment notifications.

To help in such cases, the Ticket Assignment notifications through Browser Notification at desktop and Toast Messages will be sent. Both of these notifications are displayed along with the notification in the Bell icon.

5.2.1.1 Toast Notification on the same tab

If the agent is on the same that displays the Agent Console, then "Toast Message" is displayed.

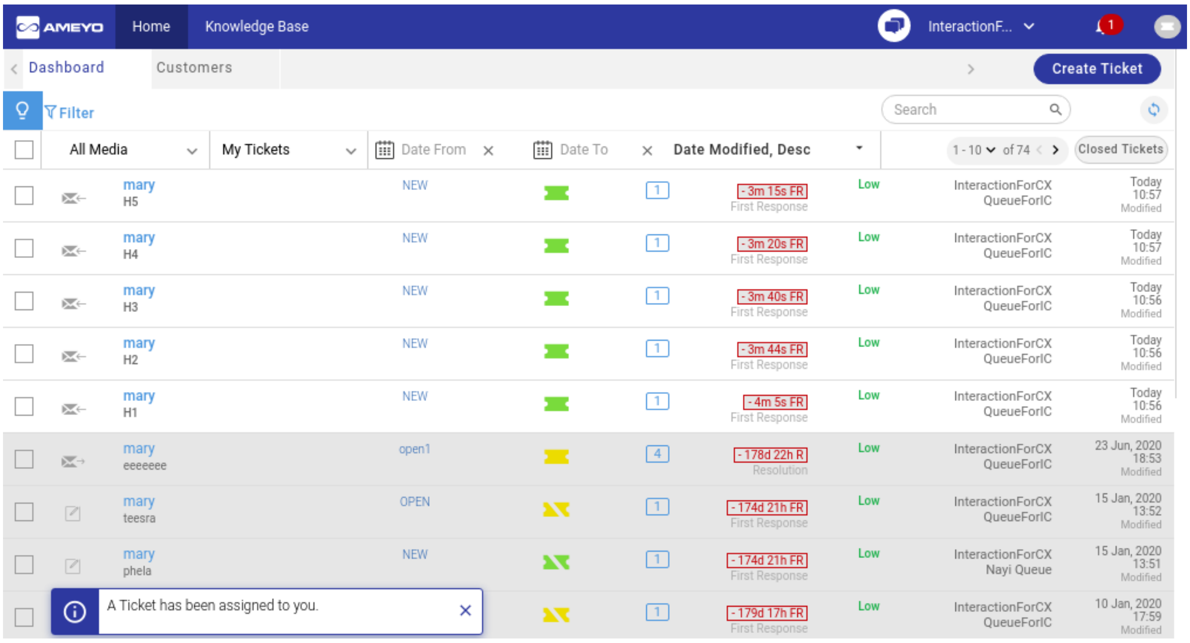

Figure: Toast Notification for ticket assignment

Toast Notification for ticket assignment is not clickable.

5.2.1.2 Browser Notification on a different tab

If the agent is on another tab, then the system displays a browser notification.

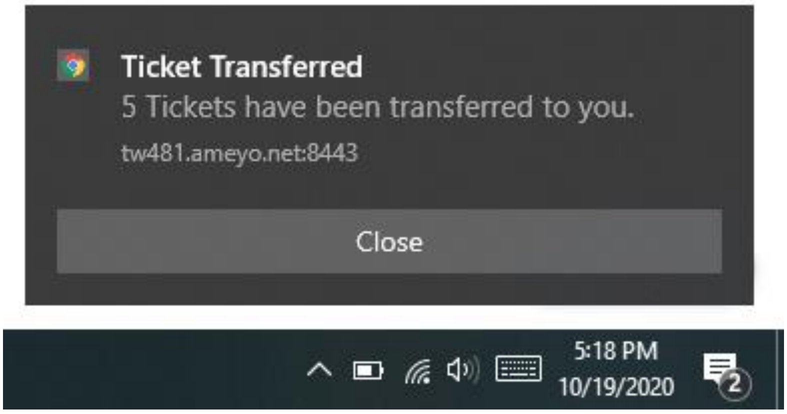

Figure: Browser Notification for ticket assignment

5.2.1.3 Clickable Notifications to show tickets in Filtered View

The Browser Notification 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.

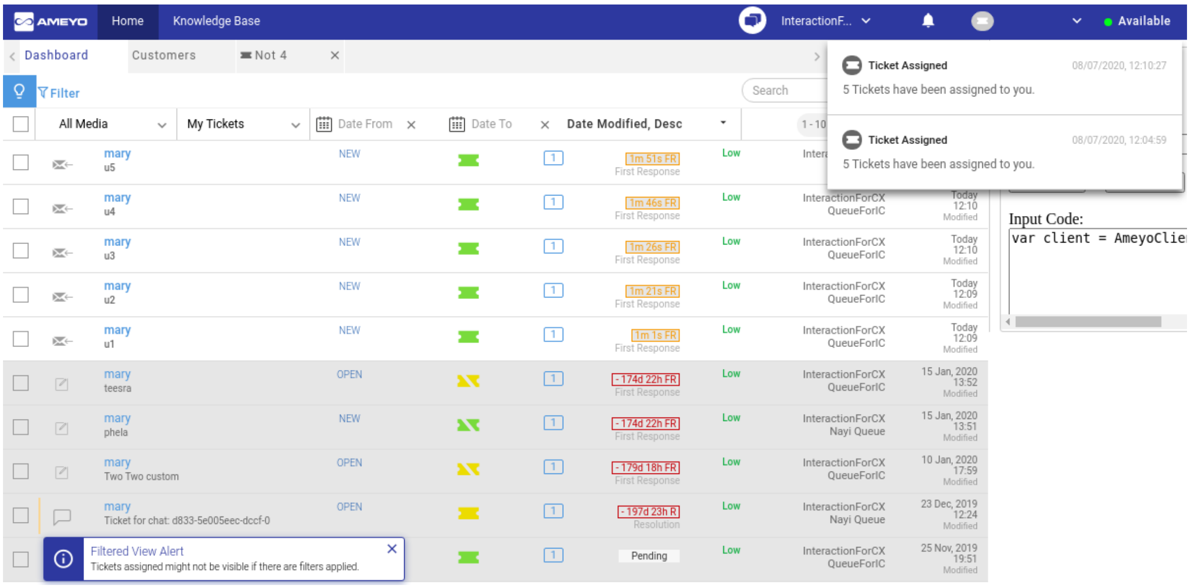

Figure: Toast Notification for the filtered view

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.

5.2.1.4 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.

5.3 Smart Mode

The working and feature of smart mode page is similar for both Supervisor and Agent. However, the Group Manager does not have the privileges to access the smart mode, as the group manager is not allowed to work in interaction and chat campaigns.

Click icon to turn on the Smart Mode. In Smart Mode, the agent can see what tickets have to be dealt with first. Agent can click "Smart Mode" icon again to turn it off.

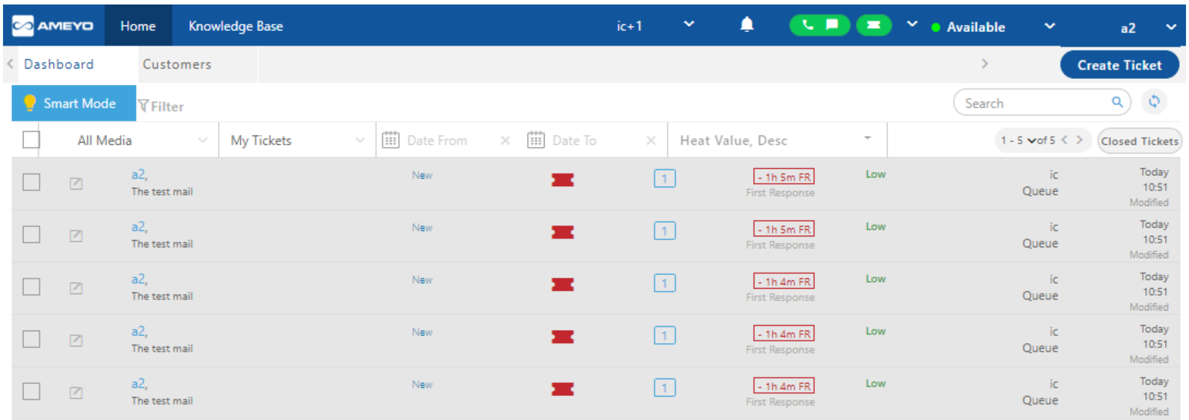

Figure: Smart Mode Enabled

Smart Mode disables all filters of the dashboard, which means all filters should be disabled and only "My Tickets" filter is applied.

5.3.1 Features of Smart Mode

Following are the features offered by the Smart Mode.

1. **Ticket Sorting:** After enabling the Smart Mode, all the tickets are sorted according to the heat value of the ticket.
2. **Media Selection:** The media selection filter in the smart is disabled. It means that all the tickets created from any of the sources,(that is, either from voice, chat, email, web or from any source medium of the chats) starts appearing on the dashboard. The agent is not able to select any tickets from the particular media sources. It shows all the tickets from all the media sources on the dashboard.
3. **Ticket Selection:** In Smart Mode, only the tickets assigned to the agent is shown to him. The agent is not able to view other tickets that are not assigned to him.
4. **Ticket Ordering:** In Smart Mode, the order of the tickets is set in the descending order according to the heat value of the tickets.

Smart Mode helps the agent to identify the tickets whose priority is high and needs the attention of the agent urgently, through Smart Mode the agent can easily recognize those tickets.

It helps the agent to identify those tickets which are pending and needs the action on them.

5.3.2 Disable Smart Mode

Click "Smart Mode" icon again to disable the Smart Mode feature.

After disabling the Smart Mode, all filters are set again to default.

5.4 Closed Tickets

The working and feature of closed tickets page is similar for both Supervisor and Agent. However, the Group Manager does not have the privileges to access the closed tickets, as the group manager is not allowed to work in interaction and chat campaigns.

Tickets that are closed are present on the agent dashboard. Agent can see these tickets, click "Closed Tickets" button present on the dashboard.

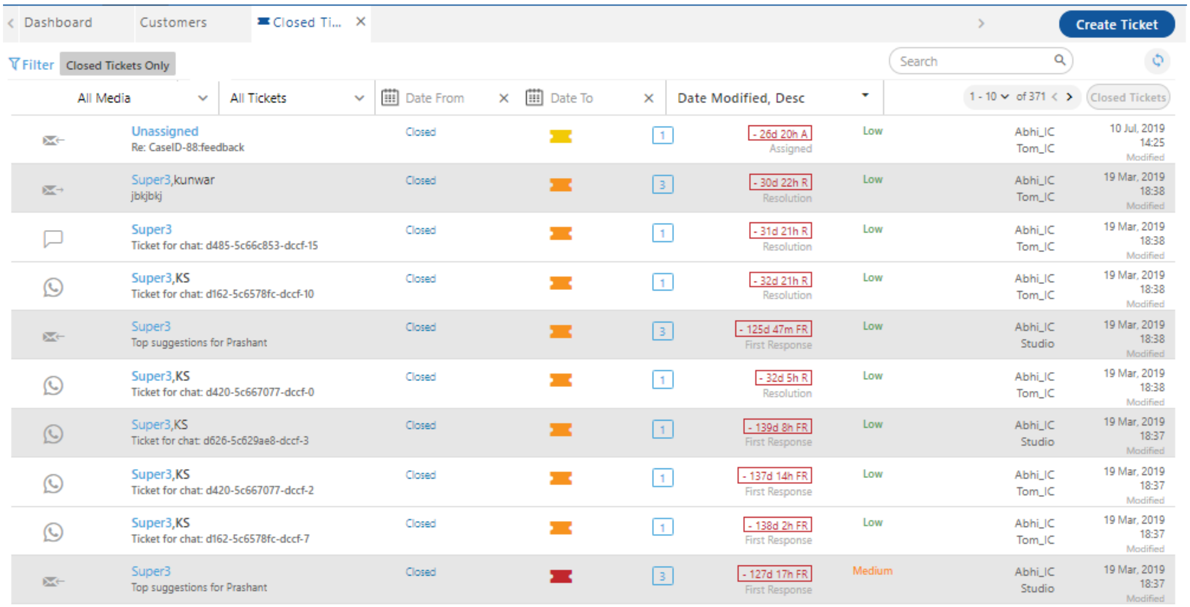

Figure: Closed Tickets

5.4.1 Operations on Closed Tickets

All operations are the same as that of operations on the Dashboard. Know more...

Basic operations that can be performed on live tickets can not be performed on closed tickets.

5.4.2 Filter

Click Filter icon to filter the closed tickets list.

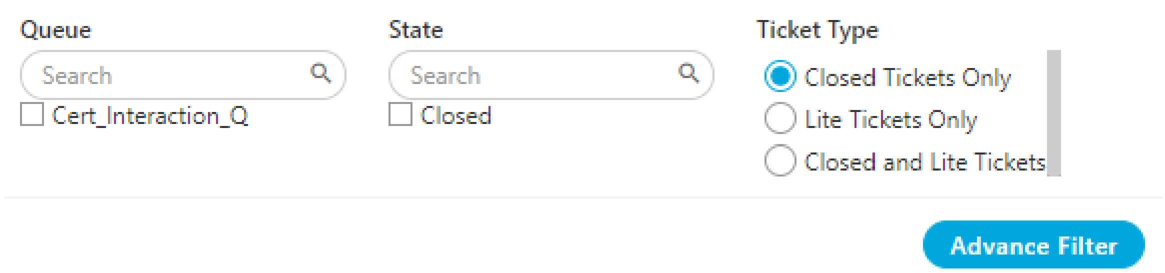

Figure: Filter

You can filter the tickets from the following list of available filters.

1. **Queue:** Enable the checkbox of the queue for which you want to search the tickets. The agent can select multiple queues at the same time. You can search the queue name, enter the queue name in the search box and press "Enter" key.
2. **State:** Agent can apply the filter on the ticket states as well. Ticket state defines the current state of the ticket in which it lies at present. The agent can search state name by using the search box.
3. **Ticket Type:** Agent can filter the closed tickets according to the ticket types. There are three types of filters present in ticket types.
    - **Closed Tickets Only:** Click it to filter only the closed tickets.
    - **Lite Tickets Only:** Click it to filter only the lite tickets. Lite tickets are those which gets closed at the same time of communication with the customer, means those queries which do not need to be created as a ticket and the solution has been provided to the customer.
    - **Closed and Lite Tickets:** Click it to filter both the lite tickets and the closed tickets on the same screen.

After the selection of the filters, click "Apply" button.

5.4.3 Advanced Filter

You can click "Advance Filter" to create an advanced filter.

For the advance filters, click "Advance Filter" button present at the bottom of the filter section.

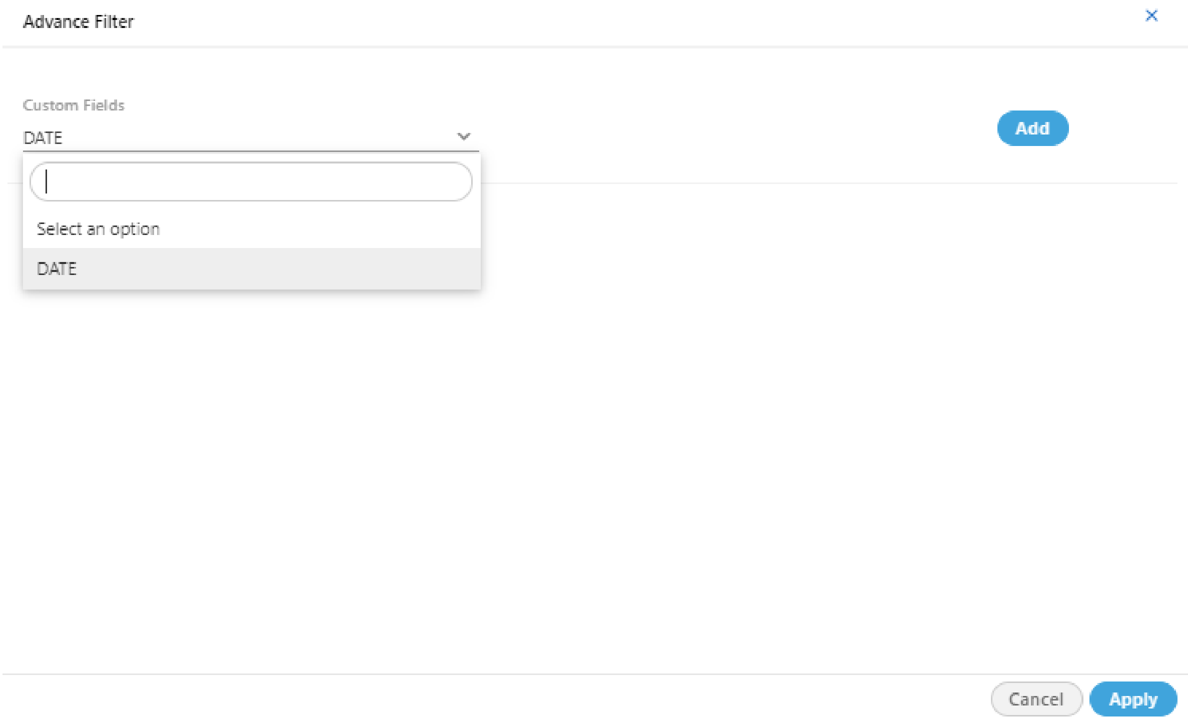

Figure: Advance Filter Box

On the new pop-up page, select the custom filters from the drop down list, based upon your criteria and the usage and click "Apply" button. It filters the tickets based upon the custom fields.

The Advance Filter can be enable or disable from back-end, hence if it is disable it will not be visible on filter tab.

6. Ticket Creation

The working and feature of ticket creation page is similar for both Supervisor and Agent. However, the Group Manager does not have the privileges to access the ticket creation, as the group manager is not allowed to work in interaction and chat campaigns.

Tickets get created only in the Interaction Campaign. No ticket will be created if the agent is logged on to only a voice campaign. However, if the customer is logged on to both Voice and Interaction the tickets will be created for every customer communication.

It is the default configuration of Ameyo that agents can login to Chat Campaign only with an Interaction Campaign. So tickets will be created automatically in the Chat and Interaction Campaign.

To create Tickets for the first time, customer information has to be provided. After that, the tickets for the same customer information will be aligned with the same customer ID.

You will get an option to create a ticket only in Interaction Campaign, whereas the ticket will be automatically created while making or receiving a voice or chat communication with the customer.

Click "Create Ticket" button present on the top of the page and perform the following steps to create a new ticket.

6.1 Customer Information

Whenever a ticket is being created for the first time for a new customer, all customer information fields will remain blank. Click "Create Ticket" button present on the right top corner of the page.

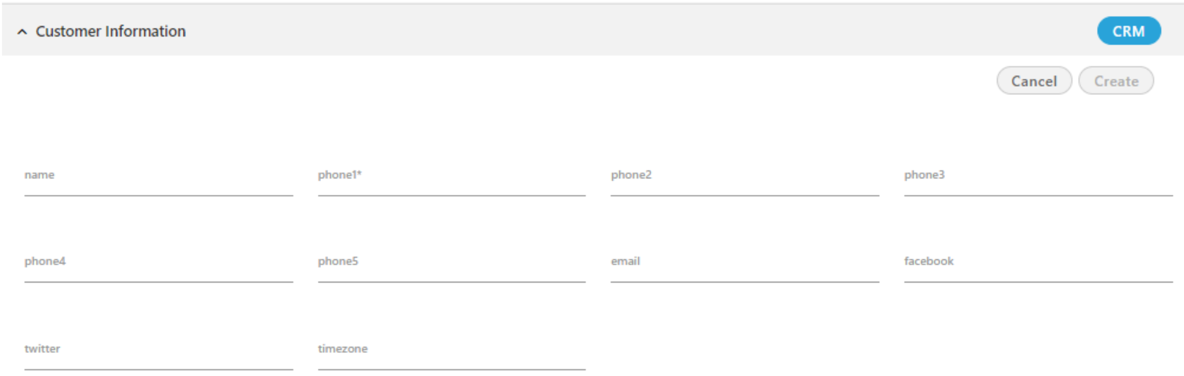

Figure: Customer Information

Provide the inputs for the following fields.

1. **Name:** Provide the name of the customer in the name field of the CRM.
2. **Email:** Provide the email-id of the customer.
3. **Twitter:** Enter the twitter handle name of the customer, if any.
4. **Timezone:** Enter the timezone of the customer in case if the customer is from a different time-zoned country.
5. **Facebook:** Enter the Facebook id of the customer, if any.
6. **(Mandatory) Phone 1:** Enter the phone number of the customer. It is mandatory to provide the phone number in the "phone 1" field of the customer.
7. **Phone 2:** Enter another phone number of the customer, if any.
8. **Phone 3:** Enter another phone number of the customer, if any.
9. **Phone 4:** Enter another phone number of the customer, if any.
10. **Phone 5:** Enter another phone number of the customer, if any.

    You can provide multiple phone numbers of the customer using phone* fields. Only "Phone 1" field is mandatory, rest all the fields depend on the availability of the customer's phone numbers.

After providing the above information, click "Create" button to create the customer.

6.1.1 Customer's information on CRM

The agent can store the information of the customer on the CRM. Click "CRM" button present on the top of the customer's information bar to see the customer's information on the CRM(if integrated on Ameyo). The complete information of the customer is available on the CRM page. Agent can change view or change the information according to the usage.

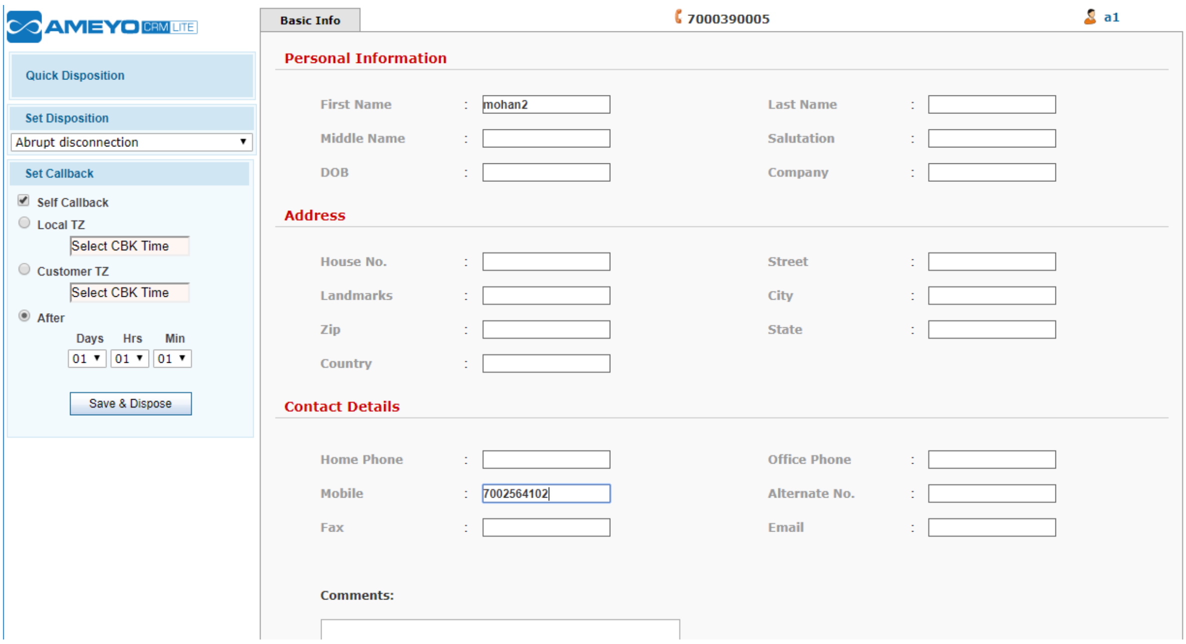

Figure: Customer Information on CRM

Click "Create" to create the customer with the provided information. After entering the information once, whenever a communication is received that matches any of the provided values, the ticket will be created for this customer.

If you are using CRM mode to store the customer's information then do not store the same information on the dashboard. The complete information will be fetched through the CRM only.

6.2 New Ticket for Interaction Campaign

Following is a screenshot for the new ticket of Interaction Campaign.

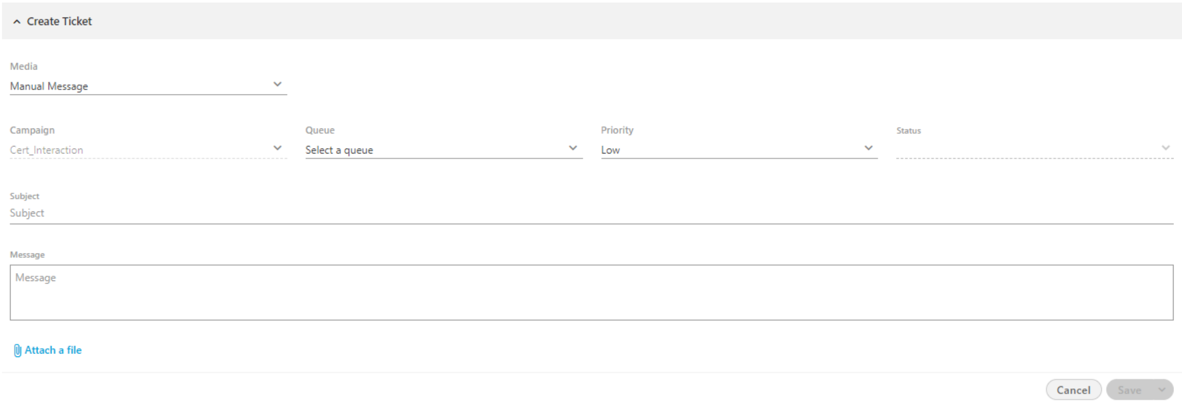

Figure: New Ticket Creation

Here, you can create both Manual Message and Email. Manual Messages are saved offline and are not delivered to the customer automatically until an agent communicates them manually through any medium. Email is sent to the customers with the creation of a new ticket.

Perform the following steps to create a ticket with a manual message.

1. **Media**: From the drop-down of the Media section, select the type of the media profile from which you want to send the message to the customer. There are by default three media profiles present in the drop-down list:
   - Manual Message
   - Email
   - SMS
   - Facebook
   - Twitter
   - WhatsApp
   - Google Play
   - If any other Media is added in the Ameyo Server through Smooch.io or Channel Addition Framework, then it will be displayed here also.

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2. **Campaign:** The campaign field shows the name of the campaign in which the agent is currently logged-in. The campaign selection is non-editable, that is, the agent can not change the campaign name, as it shows only the campaign in which the agent is currently working.
3. **Queue:** Select the queue from the drop-down list of available queues.
4. **Priority:** Select the priority type of the ticket from the following priorities from the drop-down list.
    - **Low:** It means that the ticket is on the low priority and is not urgent.
    - **Medium:** It means that the ticket is on the medium priority and is less urgent.
    - **High:** It means that the ticket is on the high priority and is urgent to resolve.
5. **Status:** Select the status of the ticket from the drop-down list. The status in the drop-down list depends upon the statuses created by the administrator.
6. **Custom Information:** If any custom field is created in the campaign or queue, then it will show here. The agent has to provide the values of these information.
7. **Subject:** Provide the subject of the message.
8. **Message:** Enter the message which you want to convey to the customer in the textbox.

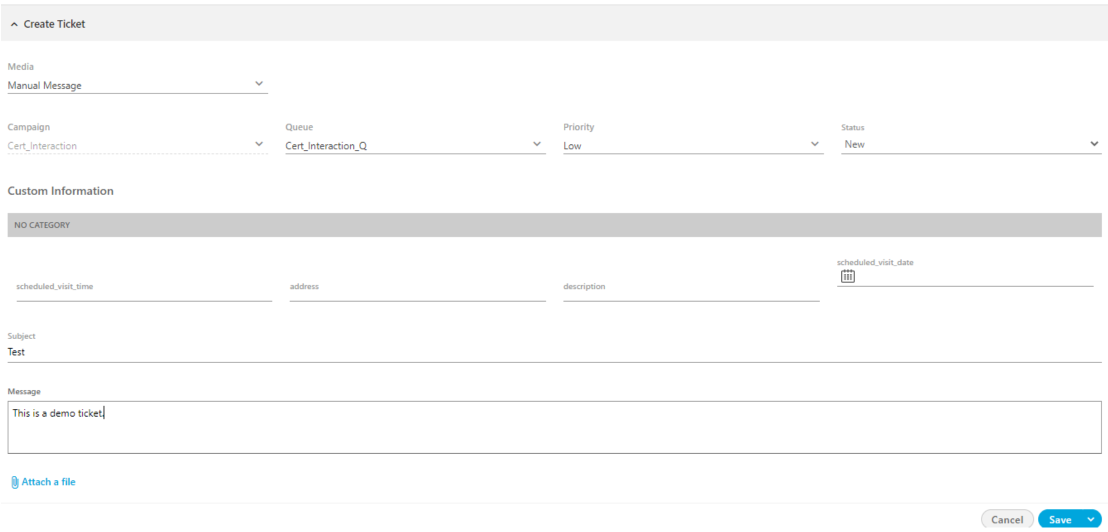


Figure: New Ticket with Manual Message as Media Profile

9. **Attach a file:** Click "Attach a file" button to attach a file with your email. A pop-up opens after clicking on the button.

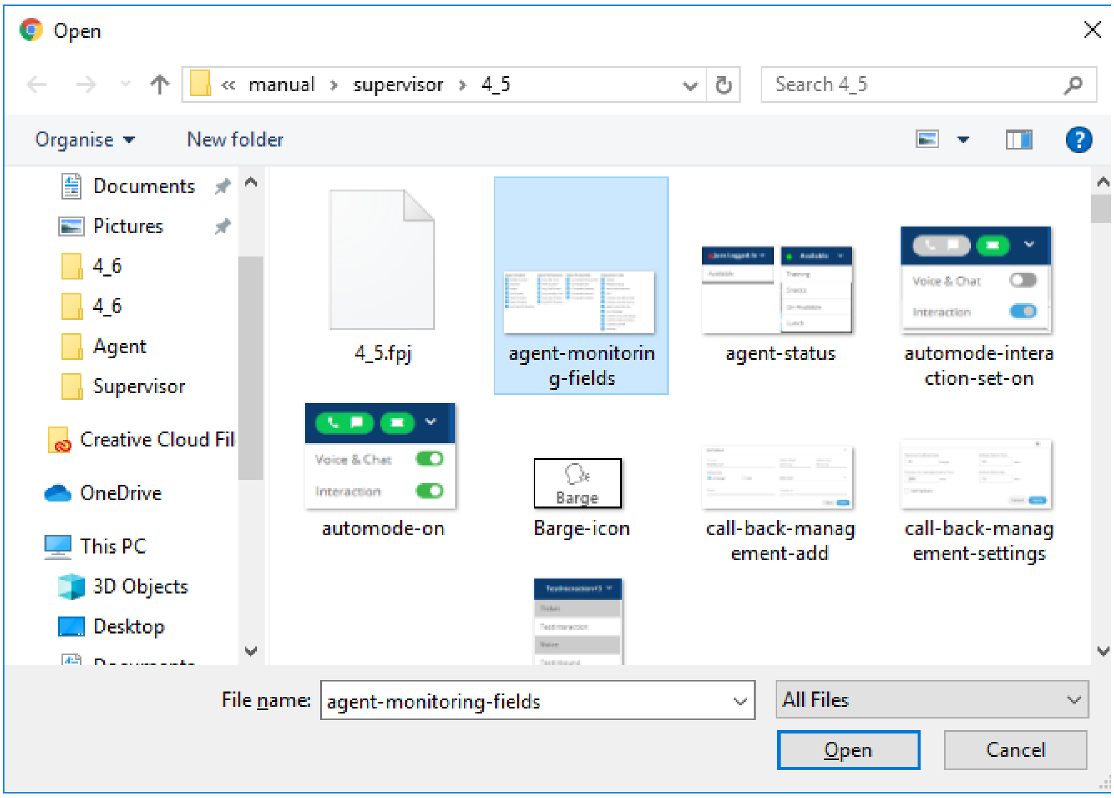


Figure: Attach File

Supported File Types

Following file types are supported for attachments with Manual 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 Manual Message is 25 MB.

Select the file which you want to attach, and click "Open" button. If the file successfully uploaded, then "Done" sign appears, else failure will occur if the file does not uploaded successfully. You can attach multiple files as well.

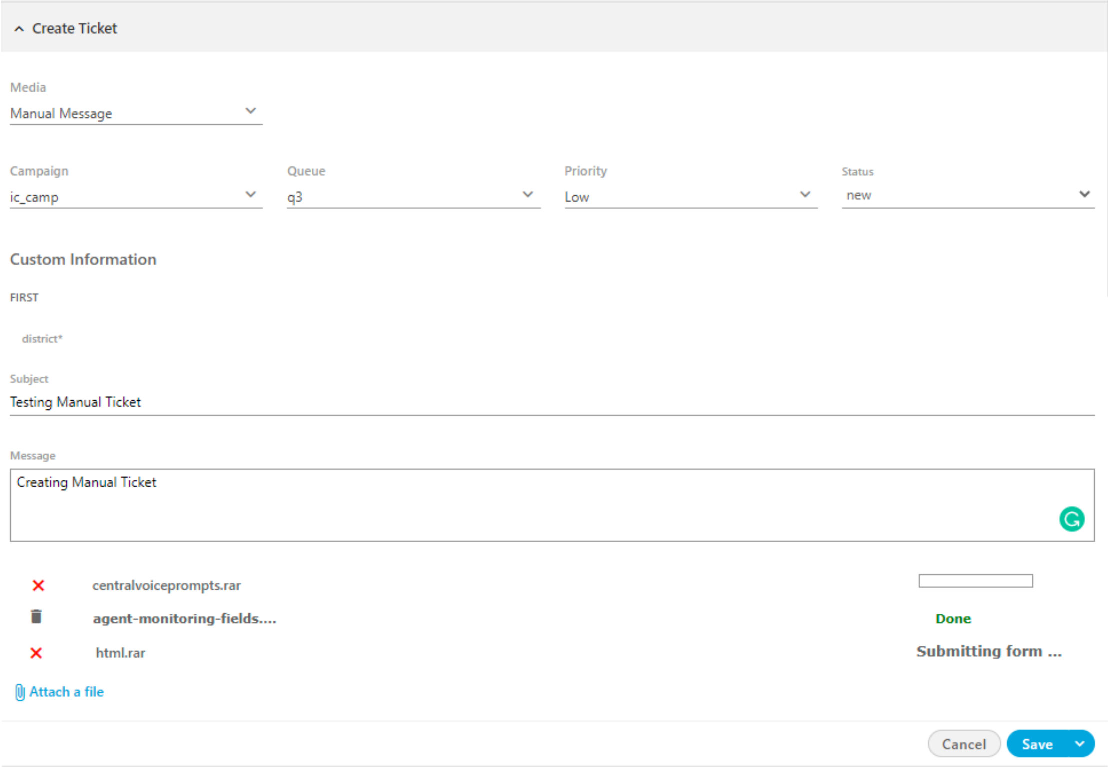


Figure: Sample Ticket with Attachment

10. Click "Save" button. A new ticket with the new customer is created and displayed in the customer information and the Ticket will display on the Agent's screen dashboard.
11. Save and Change Status: The agent can save and change the status of the tickets simultaneously with one click. Click icon to access the available ticket states. Select any state to save and change the ticket state.

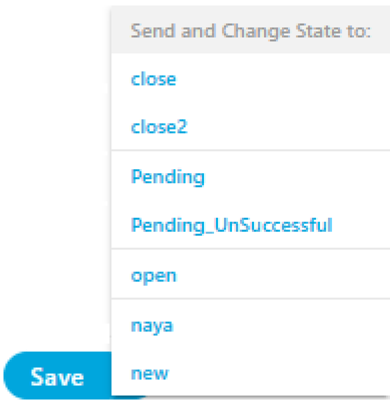


Figure: Save and Change Status of Ticket

After clicking save button, a new ticket with the new customer is created and displayed in the customer information and the Ticket will display on the Agent's screen dashboard.

6.2.1 Character Limit for various Tickets

The limit to the number of characters in the various forms of Messages has been implemented.

- In Twitter messages, the Agent can type upto 280 characters.
- In facebook Messages, the Agent can type upto 8,000 characters in faceboook post replies

The character limit will be displayed at the bottom of the textbox in the format: "<Available_limit>/<Total_limit>".

6.2.2 Custom Fields Selection

The custom fields are the fields that are created by the administrator. The agent can use the created custom fields in the customer tickets to save the information of the customer.

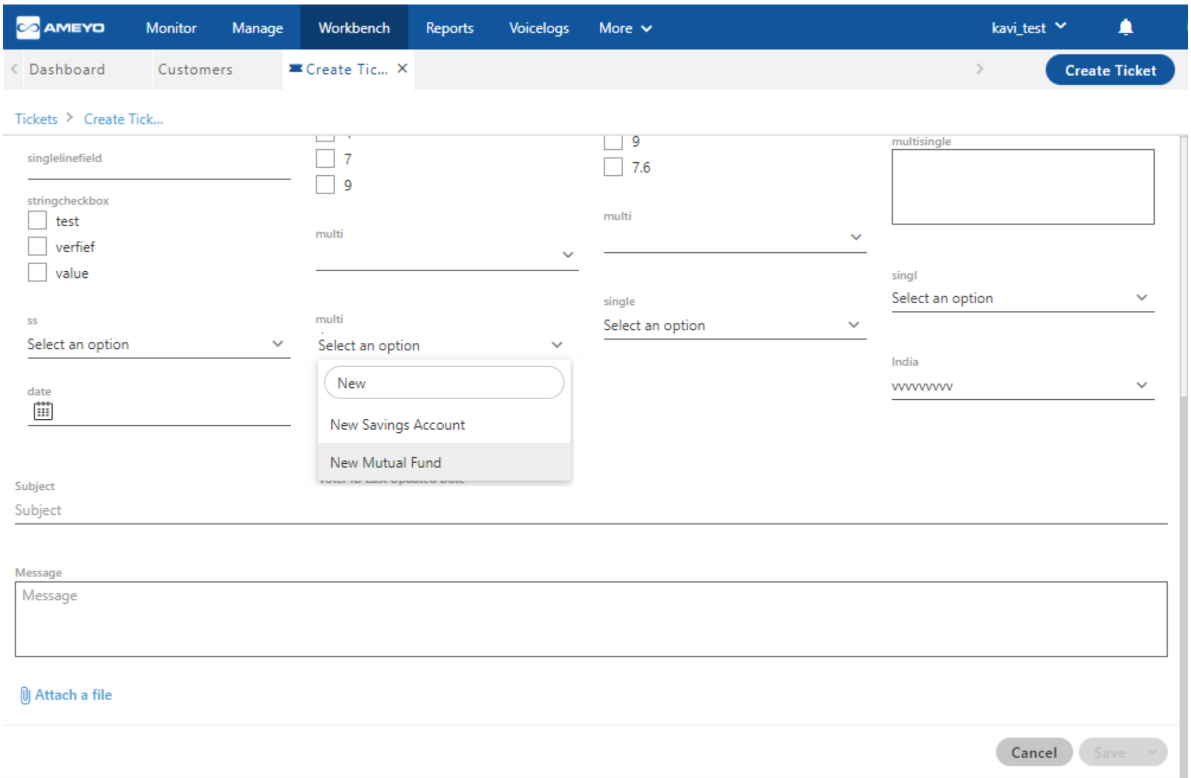


Figure: Search option for Custom Fields

The Ameyo User can type the value in the text area given on top, and it starts searching in the box. In the case of a single selection list box, the search icon with a search text field is displayed, whereas it will be hidden in case of multiple selection list box.

6.2.2.1 Regex Custom Field

Regex custom fields are the type of fields in which the agent has to provide the defined set of string. The Regex custom fields are generally used to provide a different set of strings. A Regex custom field helps the organization to provide a different unique numbers for different type of tickets. The agent has to provide the string that has configured by the administrator.

The following screenshot shows the Regex field at the ticket creation time.

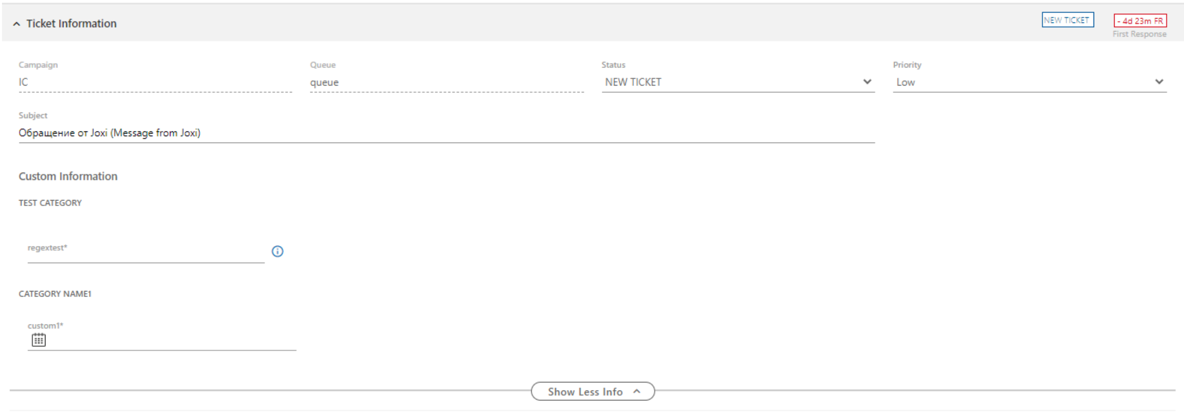


Figure: Regex Field in a Ticket

The agent has to provide the string here in the same format as defined by the administrator. The agent can hover its mouse at icon to view in the format in which the agent has to provide the Regex value.

Figure: Regex Field Pattern

The following screenshot shows the sample Regex value filled in a ticket.

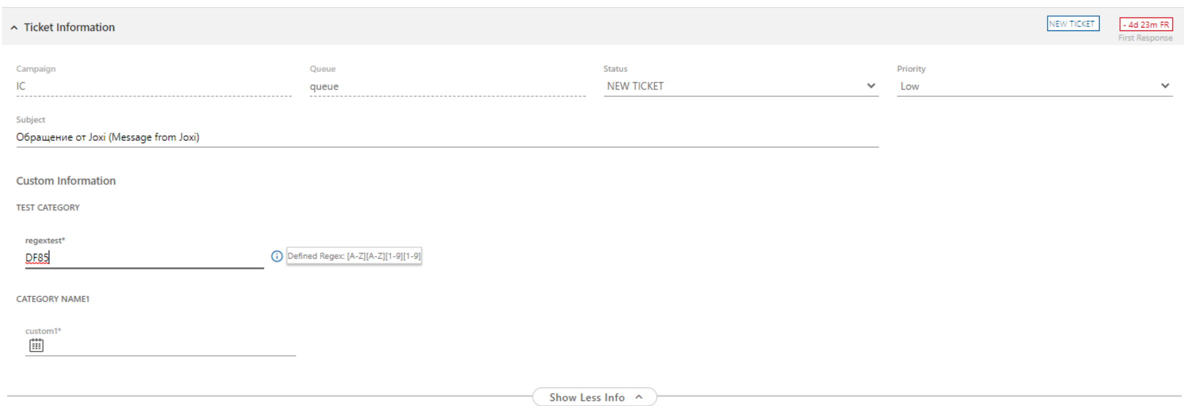


Figure: Sample Regex Pattern

If the agent does not provide a string in the defined format or the value is incorrect, then it shows an inline error when the agent tries to save the ticket information.

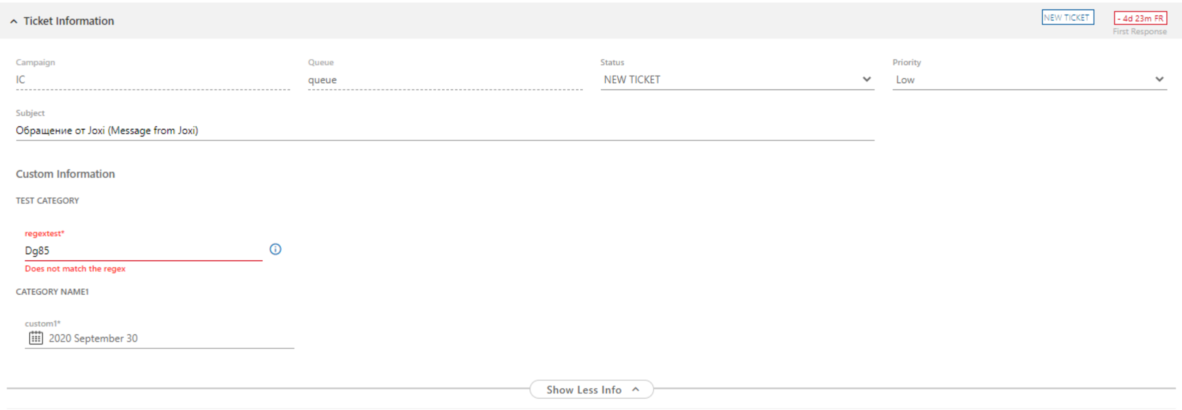


Figure: Error at Incorrect Regex Pattern

7. Ticket Page

7.1 Ticket Page

The working and features of ticket page is similar for both Supervisor and Agent. However, the Group Manager does not have the privileges to access the ticket page, as the group manager is not allowed to work in interaction and chat campaigns.

Following is a screenshot of a new ticket created with a manual message in the Interaction Campaign.

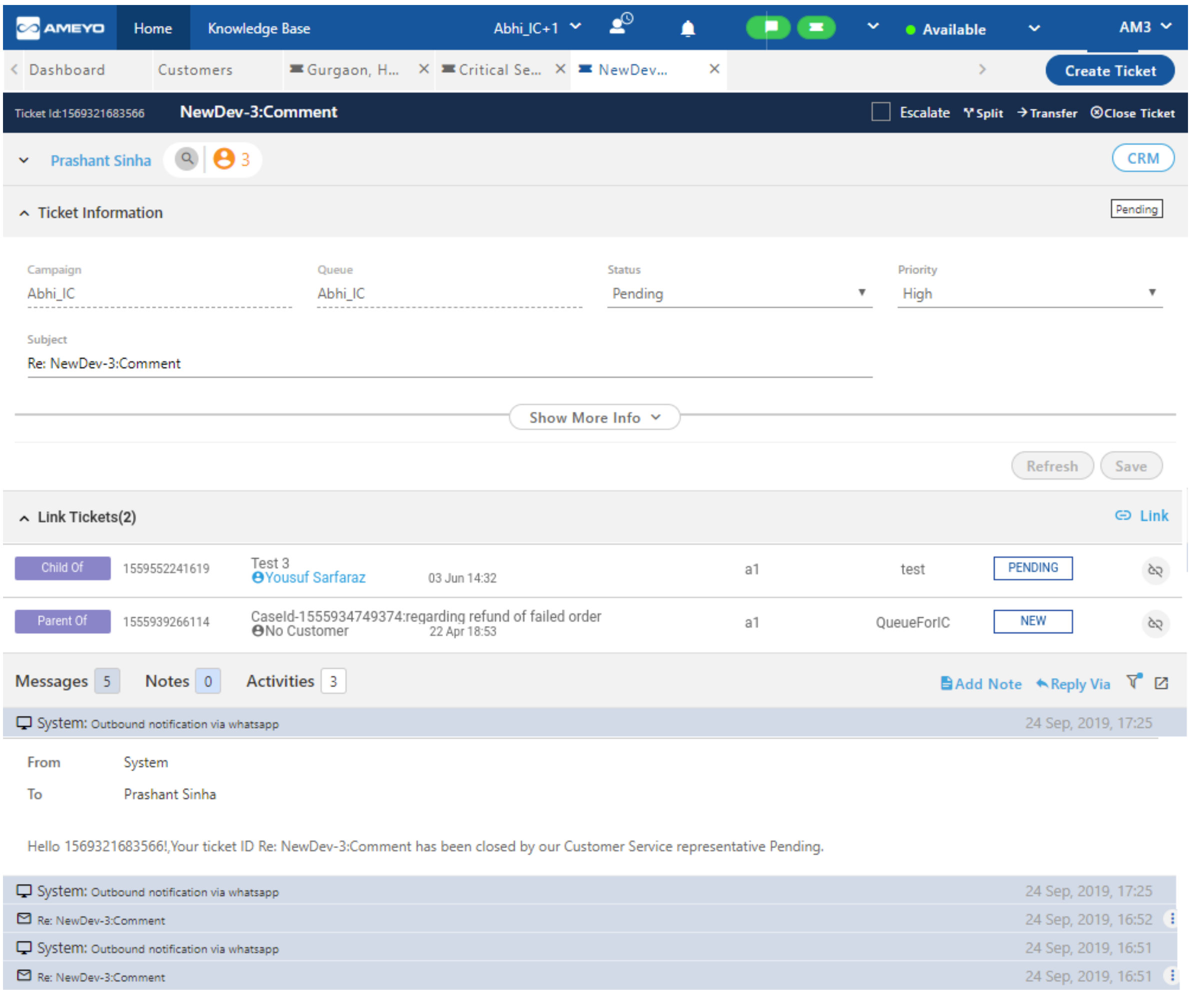


Figure: New Ticket with Manual Message

Following operations can be performed on the received ticket.

7.1.1 Basic operations

There are four basic operations which the agent can perform on the tickets received from the customer.

1. **Escalate:** Enable the "Escalate" checkbox to escalate the ticket to the higher authority like a supervisor.
2. **Split:** It allows the agent to divide the ticket into two parts. The split feature can be used when there a single ticket contains multiple issues to be resolved by different teams or agents.

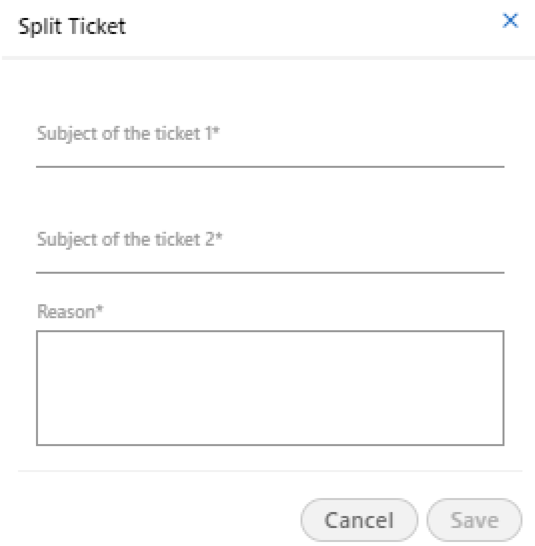
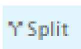


Figure: Split Ticket pop-up

Perform the following steps to split any ticket.

- Click  icon to split the ticket. A pop-up comes up.
- Provide the subject for "Ticket 1".
- Provide the subject for "Ticket 2".
- Provide the reason for the splitting of Tickets.

3. **Transfer:** The transfer option lets the agent to transfer the ticket to another queue depends upon the requirement raised by the customer.

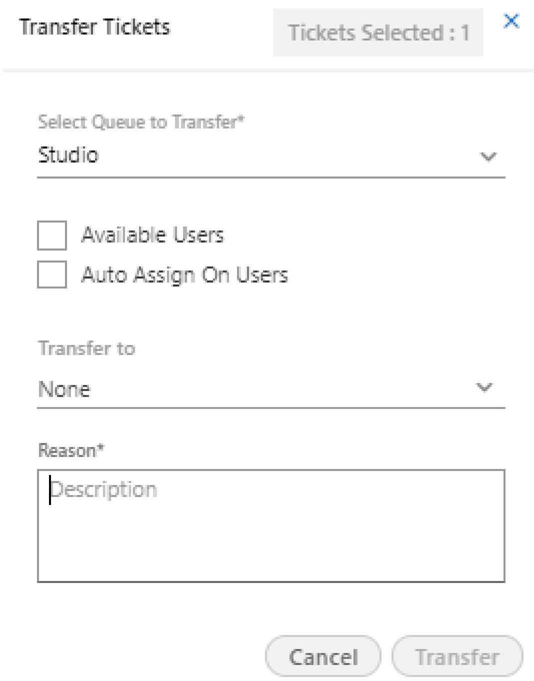
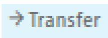
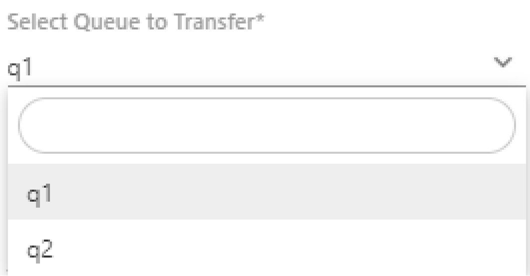


Figure: Transfer Ticket pop-up

Perform the following steps to transfer any ticket.

- Click 

icon to split the ticket. A pop-up comes up.
- Select the Queue name from the drop-down list of Queues. You can search for the queue names by typing the queue name in the search box displayed after clicking the drop-down list.



- **Figure:** Transfer Ticket Search Option

- Enable the "Available Users" checkbox to assign the ticket to any agent who is available at that moment.
- Enable the "Auto-assign On Users" checkbox to assign the ticket to any agent automatically by Ameyo.
- Provide the agent's name, if you want to assign the ticket to any particular agent in the queue specified above.
- Provide the reason for transferring the Ticket.
- Click "Transfer" button to transfer the ticket.

4. **Close Ticket:** Click "Close" ticket button to close the ticket. After clicking on the close ticket option, a pop-up comes up.

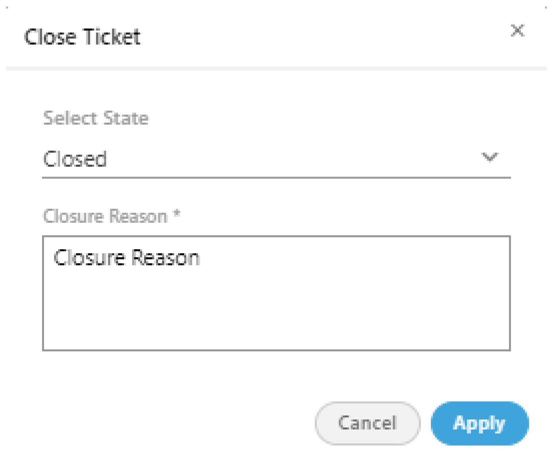


Figure: Closing Ticket

- Select the state of the ticket from the drop-down menu of the state. Agent can select one of the states which is created under the closed state by the administrator.
- Provide the "Closure Reason" for which you are trying to close the ticket.
- Click "Apply" button.

7.1.2 Customer Information

The first section of the page contains the information about the customer. Agent can view or modify the information. Know more...

7.1.3 View Customer Cards

If more than one customer is created with the same information, then the number of such customers with the same information will be displayed with icon. You can click this to view the customer cards.

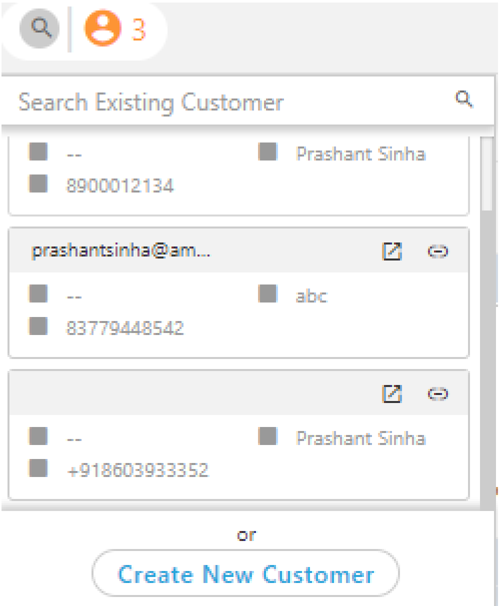


Figure: Customer Cards

- Here, the agent can click to view the Customer Information in a new tab. You can also click icon to link this customer with other customer having the same information.
- You can search for the customer, if more than one customer is created using the same information.
- If the customer is new and needs to create a new customer with the provided information, then click "Create New Customer" icon. After clicking the icon all the details will be automatically filled into the customer information tab. Fill all the information and click "Create" button to create a new customer.

7.1.4 Ticket Information

It contains the information about the ticket which involves the following fields.

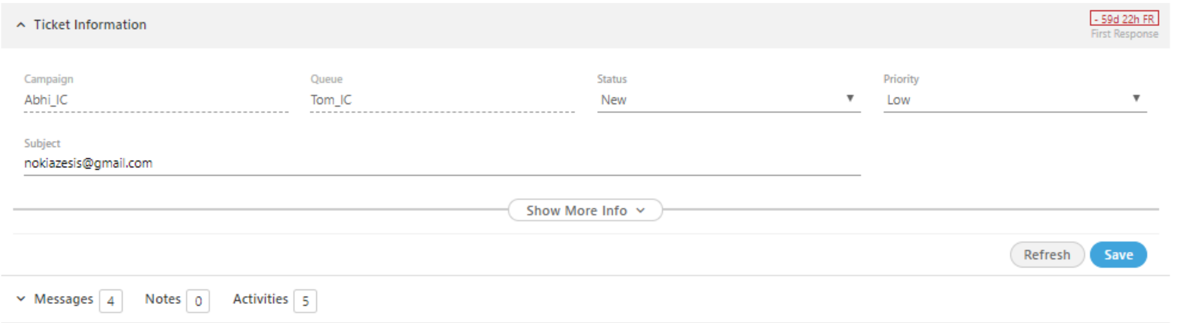


Figure: Ticket Information

1. **First Response:** It shows the first response on the ticket. The First Response is the time when the first response has been delivered to the customer. It shows on the right side of the ticket information bar.
2. **Campaign:** It contains the name of the campaign in which the ticket has arrived.
3. **Queue:** It shows the queue name in which the ticket has arrived.
4. **Status:** It shows the status of the ticket. You can change the ticket status from here. Select the status which you want to set.

   Earlier, the status of tickets were prefilled. The agents were creating and using tickets without modifying their status. This feature was resulting in creation of tickets with wrong status.
   This behavior has been handled now. If the Ameyo User is creating a ticket, then its status should not be prefilled before creating it. The status has to be selected manually by the User.

5. **Priority:** It shows the priority of the ticket. Agent can change the priority of the ticket from here as well. Select the priority of the ticket from the drop-down menu.
6. **Subject:** It contains the subject of the ticket.

7. **Show More Info:** Click "Show More Info" button to view more information about the ticket. It contains the custom fields created by the administrator. If there are no custom fields then there will not be any fields.

   You can hide this custom information from the customer. Click "Show Less Information" button to hide this section of the information.

7.1.5 Link Tickets

The link ticket section allows the agent to link multiple tickets with each other. In this, a parent ticket is linked with its subordinates tickets which treat like child tickets for the parent tickets. Know more...

7.1.6 Messages

It contains the complete list of messages sent by the customer through any particular media like chat, voice, social media, or emails.

Here we used, email media profile to show the operations here.

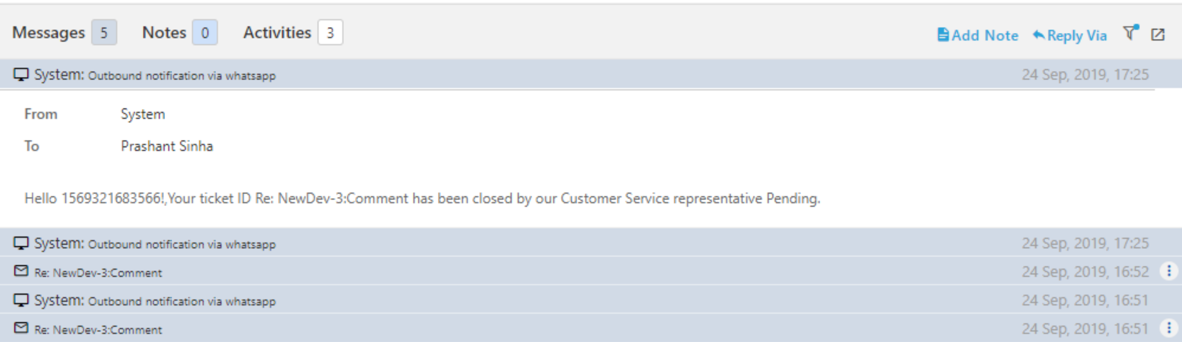
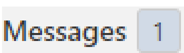


Figure: Message of Customer in Email Profile

Agent can perform the following operation on the message section.

1. **Read Message:** Agent can simply read the message sent by the customer.

2. **Message count:** The message count 

represents the total number of the tickets sent by the customer through any particular media profile.

3. **Notes:** The notes count Notes 0 shows the total number of the notes which have been given on the ticket of the customer.

4. **Activities:** The activities count Activities 0 shows the total number of activities performed on the ticket.

5. **Export Tickets:** Export tickets option provides the feature to save all the tickets in CSV format to the agent's system. Perform the following steps to export tickets.

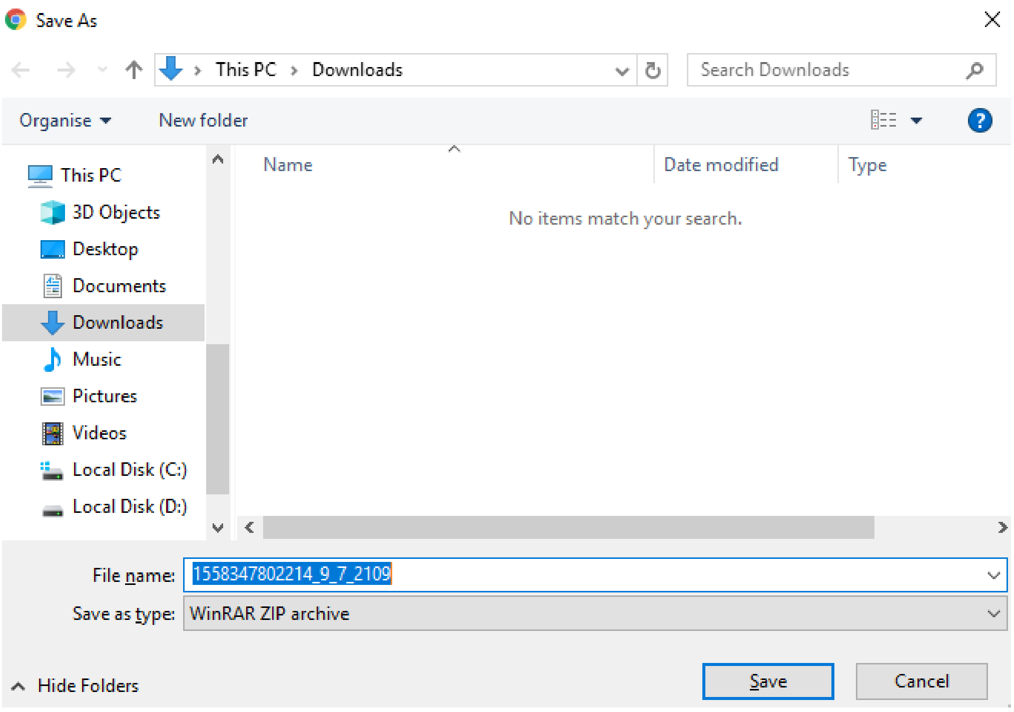
    - Click Export Tickets icon to export all the tickets of the customer.
    - A pop-up opens up, which allows the agent to download folder on the specific location.
    - 

Figure: Export Tickets

    - On the opened pop-up, provide the name of the file, if you want to change, it contains the default name of the file contains the date and time of the ticket arrived at the system.
    - Click "Save" button.

- The downloading option depends upon the downloading settings of the browser. Here, we are using Google Crome as our browser.

7.1.6.1 Add Note

Click Add Note icon to provide the note on the ticket. After clicking on the icon, following wizard opens up.

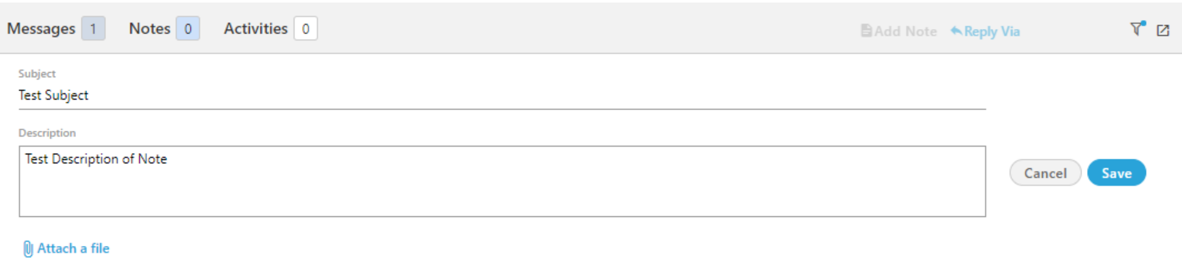


Figure: Enter Note

There are two type of notes which can be given.

- **Public Note:** When the agent wants to show the note to all the viewers of tickets, whether the users or the customer, then pubic note can be provided. The public note is visible to all the agents, supervisors assigned in that campaign and also to the customer.

  However, currently there is no mechanism for customer to see the public note.

  Toggle the Mark as public switch to provide the public note. After toggling the switch enter the subject and description of the note and click "save" button.

- **Private Note:** When the agent wants to provide the note only for the personal use, then a private note can be applied. The private note is visible to all the agents and supervisors who are assigned in that campaign.

  By default, a note is marked as private, until the status of the toggle button is not changed. For private note, enter the subject and description of the note and click "save" button.

7.1.6.1.1.1 Attach a File

The agent can attach the files with the notes as well. Click "Attach a file" button to attach a file with your email. A pop-up opens after clicking on the button.

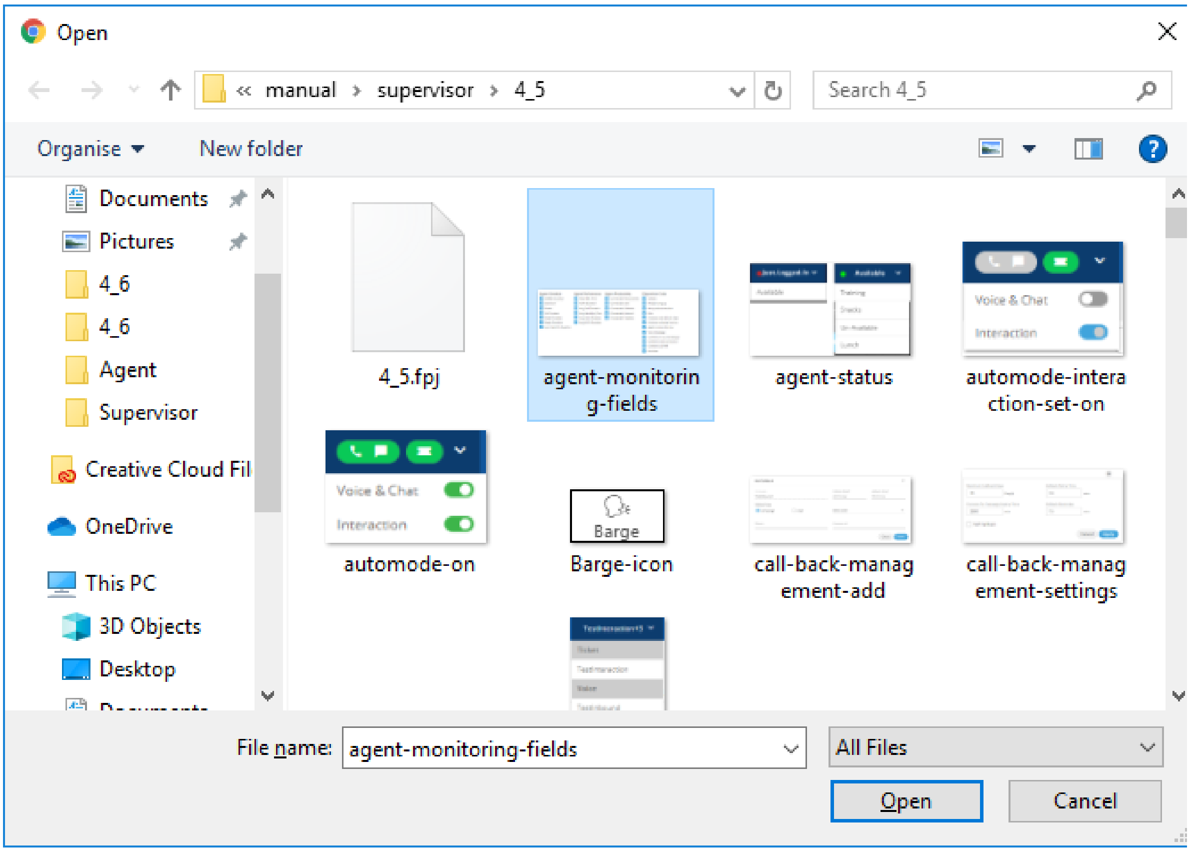


Figure: Upload File

Select the file which you want to attach and click "Open" button. If the file successfully uploaded, then "Done" sign appears, else failure will occur if the file does not upload successfully. You can attach multiple files as well.

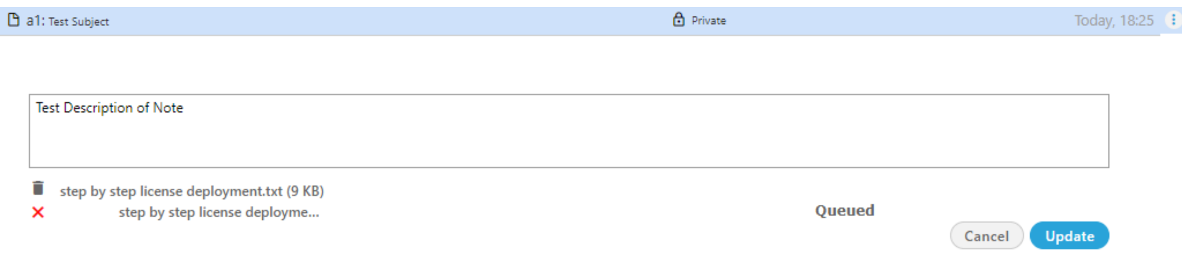


Figure: Attach File

Following file types are supported for attachments with Notes.

.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 Public or Private Note is 25 MB.

7.1.6.2 Multiple Tickets Filter

If there are more than one message send by the customer, then agent can filter the messages according to the need.

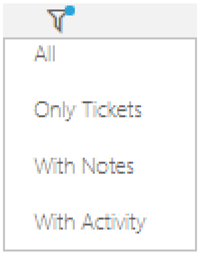


Figure: Filters the Messages

Following filters are available. By default, "Only Tickets" filter will remain selected that will show only ticket messages and no notes will be displayed.

- **All:** It shows all the tickets and notes send by the customer.
- **(Default) Only Tickets:** It filter those messages which are considered as tickets.
- **With Notes:** It shows all the tickets with all notes provided. If the note is provided on any ticket, then agent has to apply this filter to view the note on the ticket. After the
- **With Activity:** It filter those messages on which some activity has been performed. The following are some activities that will record with a ticket:
    a. Activity when a new ticket is being created.
    b. When an agent picks the ticket
    c. Assignment/Un-assignment/Re-assignment of the ticket.

d. If ticket is being "escalated"

e. When the ticket is being transferred.

f. When agent "link" the ticket with other ticket.

g. When ticket is "merged"

h. Agent replies to a ticket

i. Adding/deleting/updating a "note"

j. Adding or deleted an attachment

k. Change in the Ticket Status

l. Adding/Updating/Deleting a custom field

- You have to select "All" or "With Notes" filter to show the notes.

7.1.6.2.1 Access a Note

Select "All" or "With Note" filter to access the notes. All the tickets and notes are visible as the collapsible sections.

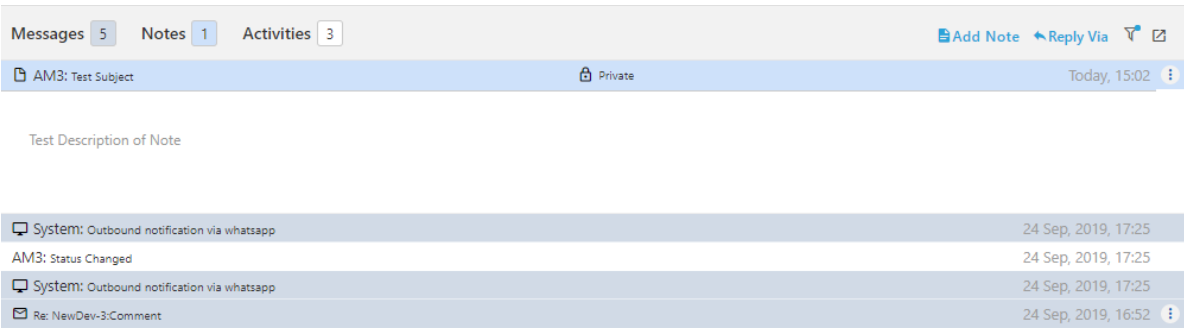


Figure: Ticket with the Note

Click the note to access it. On the collapsible bar, Public label is displayed for a public note, whereas Private is displayed for a private note.

7.1.6.3 Update and Delete a Note

Click icon to update or delete the note.

All the agents and supervisor assigned in the same Interaction Campaign, can update and delete both public and private notes on the assigned ticket.

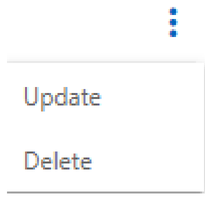


Figure: Options to Update or Delete the Note

It shows the following two options.

- **Update:** Click "Update" button to edit the note inline.

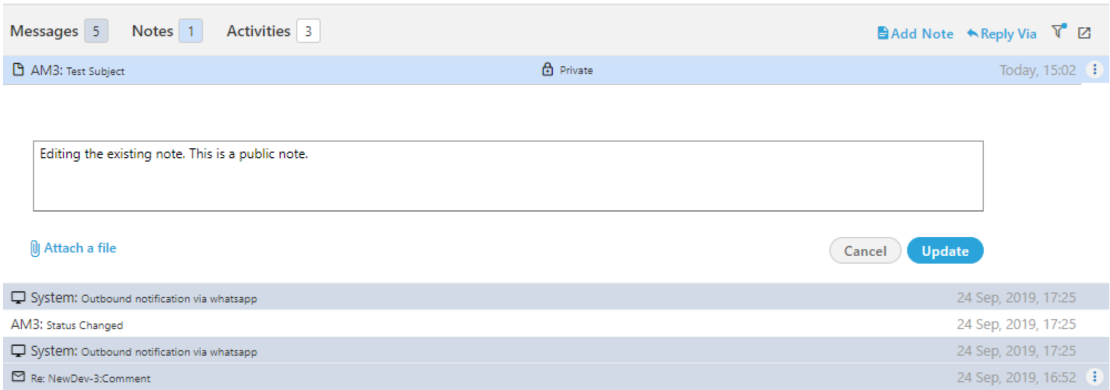


Figure: Update Note

"Update" button only be visible once the agent changes the note. Click "Update" button to save the changes.

- **Delete:** Click it to delete the note. A confirmation pop-up is displayed.

If the note is deleted, then it cannot be retrieved in any manner. It will be deleted permanently.

The following screenshot shows the confirmation message before deleting a public note.

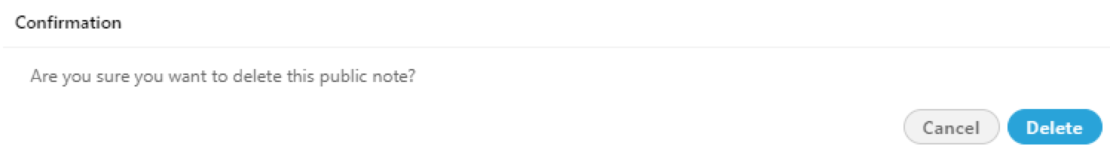


Figure: Confirmation pop-up

The following screenshot shows the confirmation message before deleting a private note.

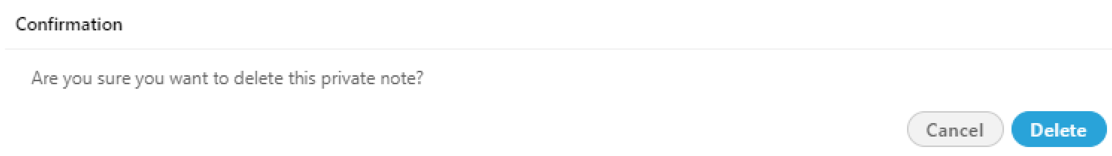


Figure: Confirmation pop-up

Click "Delete" button to delete the note permanently, else click "Cancel" button.

7.1.6.4 Reply

Click ⋮ icon to reply to the customer on the ticket. The actions on this icon depends upon the media profile type. Click "Reply via Email" to send the reply to the customer through email.

Figure: Reply on Email Ticket

Provide all the necessary details used while creating the ticket.

7.1.6.5 Send Options

Agent is now able to send and change the state of the ticket simultaneously, by just clicking on "Send" button and selecting the state of the ticket.

Click ⌄ icon present adjacent to the send button. It shows the complete list of the state which has been configured by the administrator.

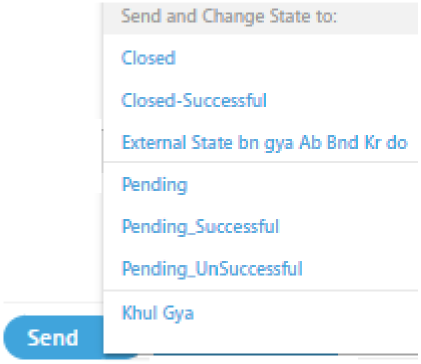


Figure: Send and change State of Ticket

Select the state and click the send button. It changes the state and sends the reply to the customer simultaneously.

Click "Send & Close" button to send the reply and close the ticket simultaneously.

7.1.6.6 Acronyms

The acronyms are the set of the short words through which the agent can insert more words, just by typing the short letters or few words. The agent can use the acronyms in the tickets. The acronyms help the user to reply fast as compared to write the complete reply.

The acronyms can be used in the tickets receiving from the following medium.

- Tickets of Facebook Comments
- Tickets from Twitter Reply
- In the Note Descriptions
- In the Email Replies (only in the body section of the email)
- In the chatting from the agent
- Closure reasons of the tickets like Split, Merge, Close, and Transfer

7.1.6.6.1 Preview the uploaded Attachments

It is a hectic task for an agent to view the attachments uploaded in the ticket by the customer in the ticket. It becomes more complicated when there are multiple tickets. To view all of the attachments, the agent has to download all the attachments one by one, and then only he can view them. Thus, to simplify the agent's task, Ameyo has introduced the Preview option for the attachments.

The agent can now click and view the attachments uploaded by the customer in the ticket without downloading them. However, the downloading task has the same feature as earlier. While previewing the attachment, the agent can also download the attachment directly from the previewing option, if required. The preview option will be available for all types of tickets, irrespective of their chat channels.

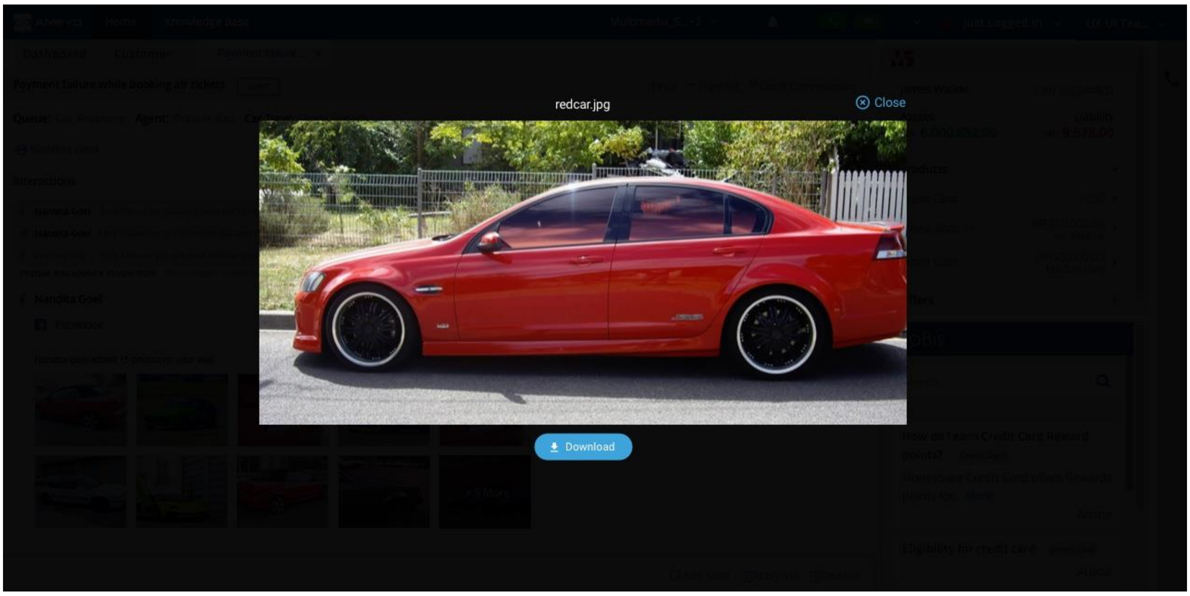


Figure: Preview the Attachment in the Ticket

The following are the features available while previewing the attachments.

1. The agent is able to download the attachment while previewing it.
2. The agent can zoom in/out the attachment.
3. The name of the file is also visible while previewing the attachment.
4. Arrow buttons to view next or previous attachments are also available.
5. If a file has been uploaded, the agent can scroll down to view the attached file's pages.
6. If a video file is uploaded, the agent can play and pause the video.

".png", ".jpg", ".jpeg", ".pdf", "mp4 " are the file types that are supported for previewing.

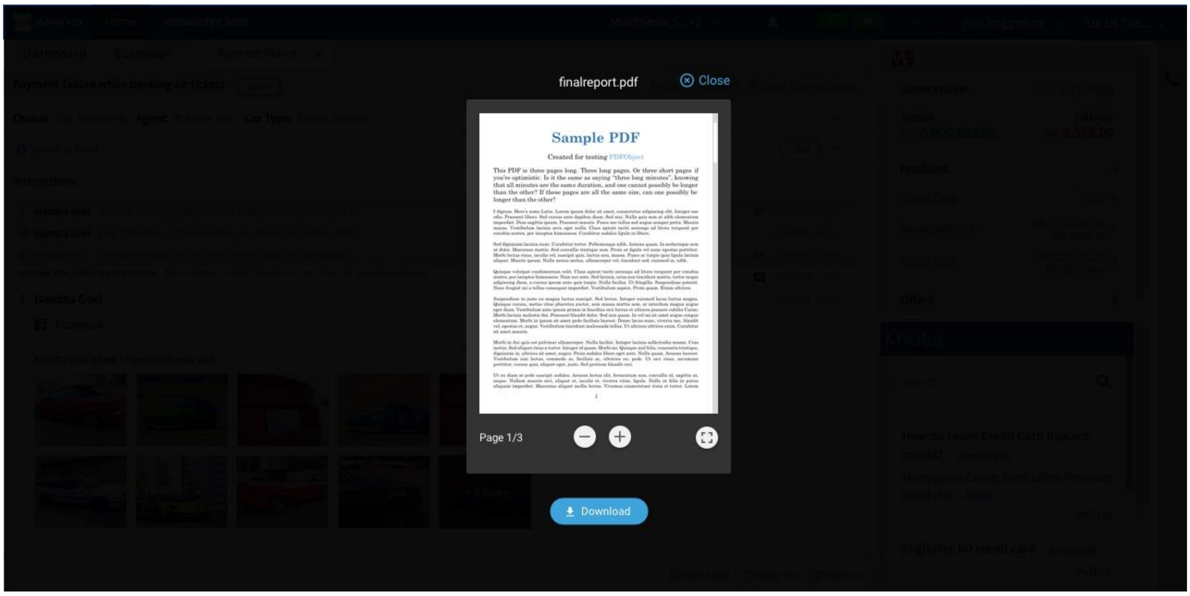


Figure: Preview of the File type Attachment

While previewing the attachment, the download button allows the user to download the attachment.

An "eye" icon will be displayed adjacent to the ticket's attachment name, at which the agent can click for the preview.

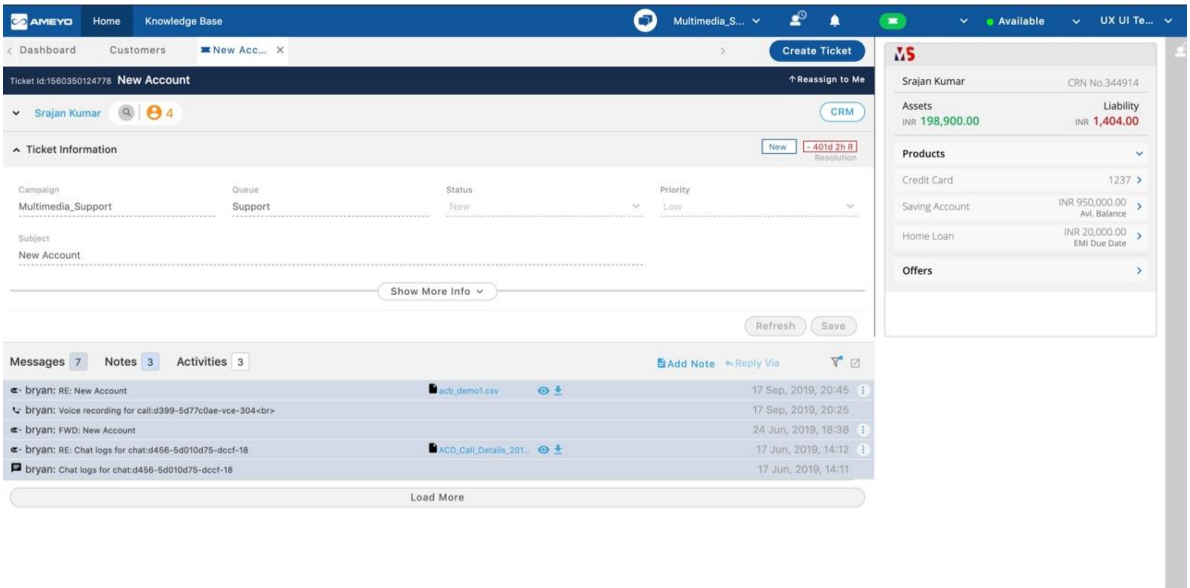


Figure: Eye Icon to Preview an Attachment

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7.1.6.6.2 Download the Attachments

The agents can download all attachments from one place. A download icon has been provided in the ticket listing bar, through which the agents can download attachments in the zip format.

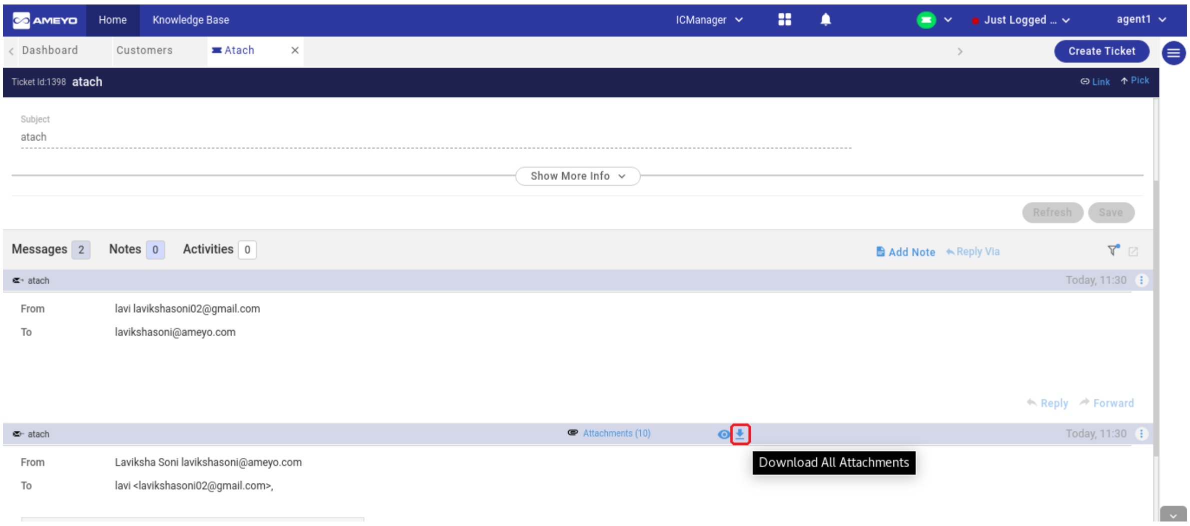


Figure: Download Option on the Ticket Listing

The download all button has also been provided while previewing the attachments. That is, the agents can download the attachments directly while previewing them.

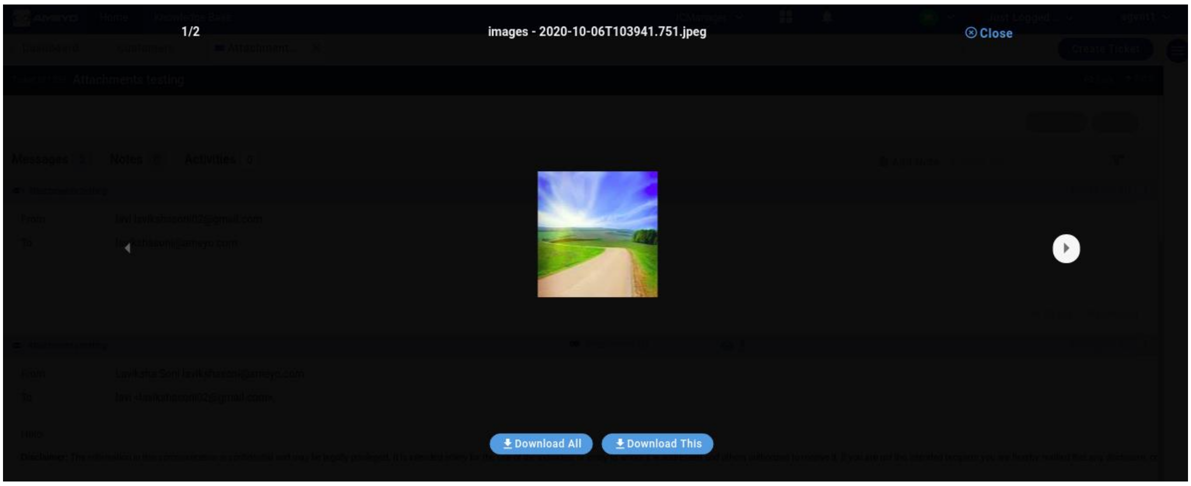


Figure: Download All Button while Previewing Attachments

The attachments will be downloaded in ".zip" format. And the maximum size of ".zip" file should be of 25Mb. If the download file size is more than 25Mb, then an error notification will be shown to the agents.

Figure: Error Notification when Size is More than 25Mb

7.1.6.7 Update Tickets of Deleted Customers

There are several cases when customer information is deleted from the system, but the ticket raised by that customer is not updated or it is needed to provide some additional information in the ticket. In such cases, the agent can update the tickets these tickets also by performing the above steps.

7.1.6.8 Attach Tickets

The agent is able to attach tickets with calls or can create a new ticket for the existing call. Know more...

If there are multiple customers with the same number and CustomerQuery Node is used in the inbound nodeflow, then a modal is displayed to the agent that displays all customers with the same phone number. When the agent clicks a number and click "Link" button, the customer is linked, but the name of the linked customer is not displayed in "name" field of the Customer Information. This issue has been fixed now. Now, when the agent links the customer in the modal displaying the multiple customers for the same phone number, then the name of the linked customer is being displayed in the "name" field of the customer information.

7.2 Link Tickets

The working and features of link ticket page is similar for both Supervisor and Agent. However, the Group Manager does not have the privileges to access the link ticket, as the group manager is not allowed to work in interaction and chat campaigns.

In many business, the multiple tickets have to be created on a customer communication (such as call, chat, or email) where one ticket will act as a Master and other tickets are considered as Subordinates.

7.2.1.1.1 Example

If you take an example of account creation in a Membership-based Organization then a single ticket "Membership to be created" can have the following operations and each operation have to be mentioned in a ticket.

- **Main Task:** Account Creation
    1. Create Account and Update its records
    2. Generate Membership Number and share it with the new Member
    3. Create the Account on Website using a Temporary Password and send an email to the customer
    4. Ask the Publishing Team to create the Membership ID Card and Provide its ticket Number to the New Member
    5. Inform the Offers to the new Member and send the Voucher Codes

Now, in such case, the organization wants its Agent to create 6 tickets (1 for Main Task and 5 for sub-tasks) and close them as "Resolved". These six tickets should be linked with each other and the main ticket should not close without closing all of the sub-tickets.

In Ameyo, the Departments can be reflected as Queues in the Campaigns. The above tickets can be shared in the different Departments.

To meet these requirements, link these tickets through Parent-Child Relationship in Ameyo. The Agent can create a Parent Ticket and its Children Tickets.

7.2.1.1.2 Link Ticket Option

In the ticket page, a "Link Tickets" section will be enabled if the configuration is done for it by the administrator. In the Link ticket section, a "Link" option is present at the right side of the section which allows the agent to link the tickets.

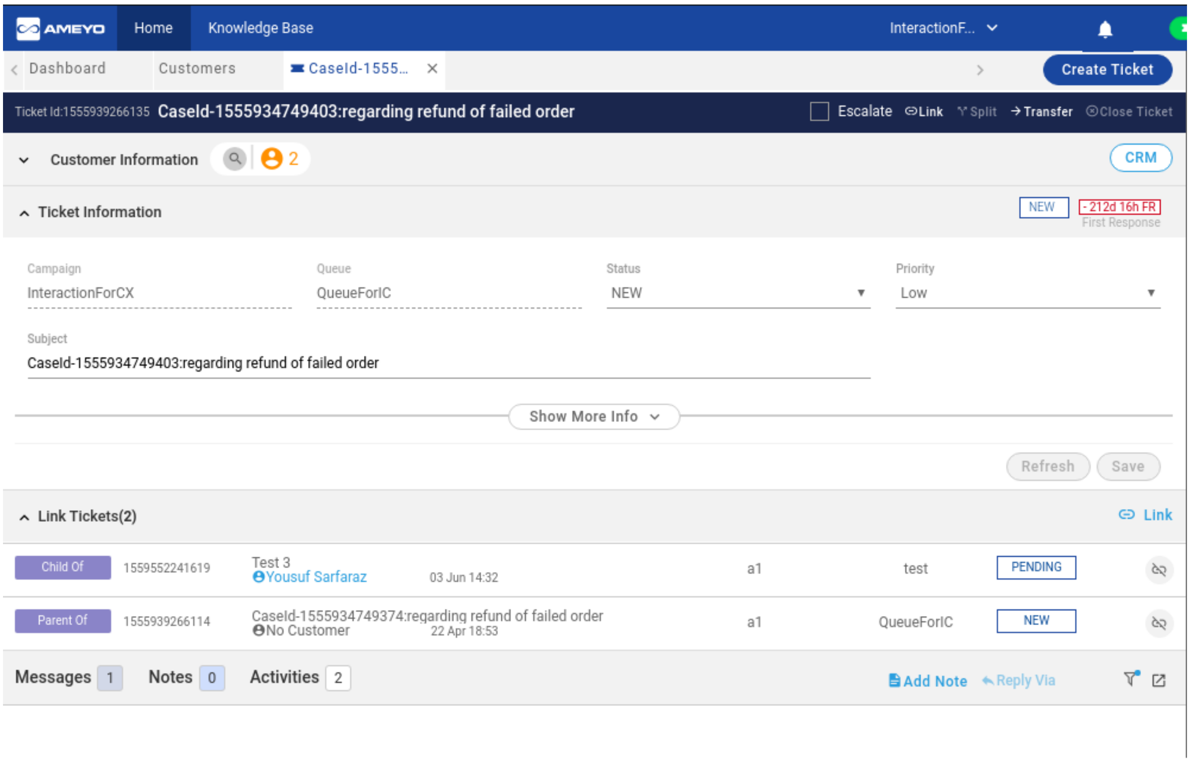


Figure: New "Link" option in Customer Detail Page

The user can click "Link" option to access "Link Ticket" pop-up.

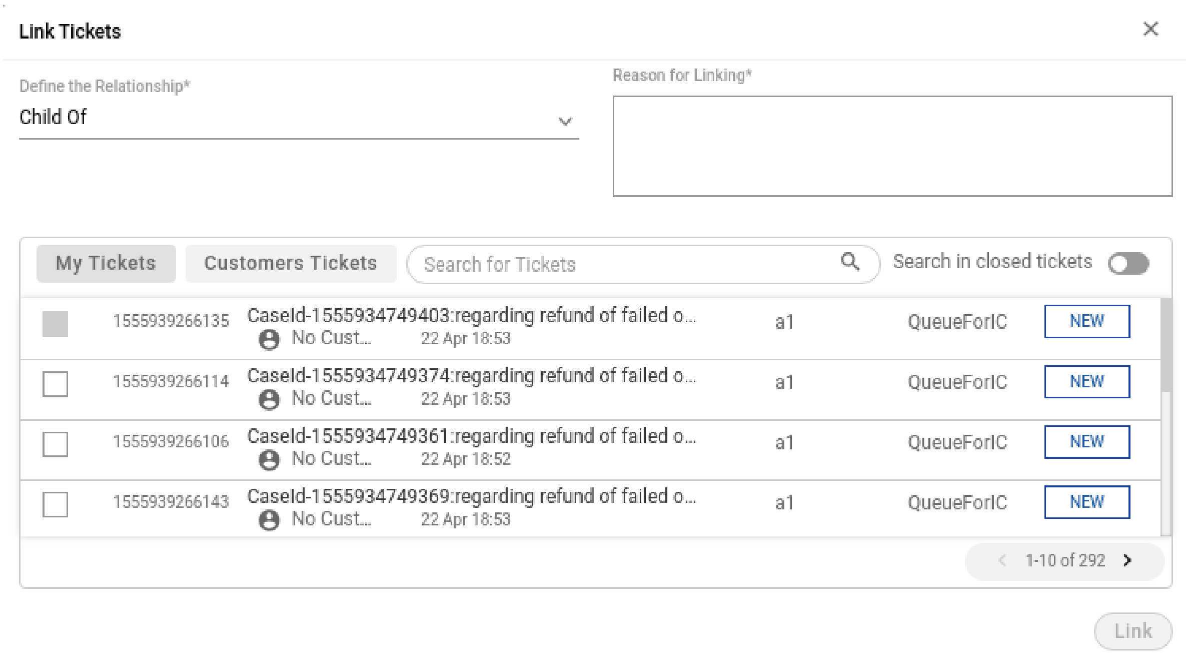


Figure: "Link Tickets" pop-up

This pop-up contains the following options.

- **Define the Relationship:** You can select any of the following options in this drop-down menu.
  - **Parent of:** Select it to view the children ticket of the selected parent ticket.
  - **Child of:** Select it to view the parent ticket of the selected child ticket.
- **Reason for Linking:** Here, the user can mention the reason to link the tickets.
- **My Tickets:** My Tickets option shows those tickets which are assigned to that agent.
- **Customer Tickets:** Click it to view the customer tickets.
- **Search Bar:** The user can enter the keyword to search in the linked tickets (Parent and Children tickets).
- **Search in Closed Tickets:** Click this toggle switch to enable the search in the closed tickets.

"Link Tickets" section shows "Child Of" and "Parent Of" labels. After linking the ticket, "Unlink" option is displayed. A user can click it to access the following pop-up.

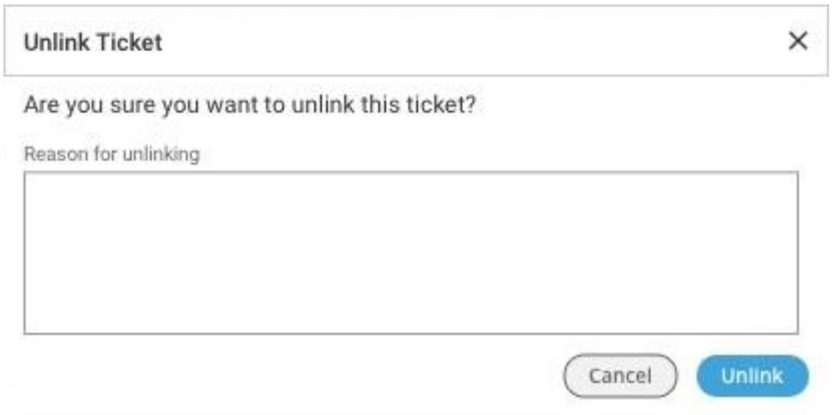


Figure: "Unlink Tickets" pop-up

The user has to enter the reason to unlink the ticket and click "Unlink".

7.2.1.1.3 Capabilities of Linking Tickets through Parent-Child Relationship

- A child ticket can be linked to only one Parent Ticket. If you try to link the ticket with another parent, then the system throws an error. Refer to the following screenshot.

Figure: Error if the user tries to link a Children Ticket to another Parent Ticket

- The Parent Ticket can have maximum of 10 children tickets. If you try to create more child ticket in a Parent Ticket, then the system throws an error. Refer to the following screenshot.

Figure: Error if the user tries to create more than 10 children tickets

- **Hierarchical Structure:** A Child Ticket can be a Parent Ticket of its Children Tickets. It provides a Hierarchical Structure of the linked tickets. In such a structure, you can have maximum 30 tickets.
- **No Split or Merging of Linked Tickets:** The Linked Tickets can be neither split nor merged.
- If a ticket has been linked as a Child in one Parent-Child Relationship, then it cannot be added as the Child in another Parent-Child Relationship. However, it can be the Parent of the children tickets.
- **No Linking with Lite Tickets:** Lite Tickets cannot be linked. Any parent or child ticket cannot be linked with Lite Ticket. This is because the Lite Tickets are

considered to contain no information and are used to create and disposed of automatically with the calls.

- **Closure of Tickets:** If all children tickets are not closed, then the Parent Ticket cannot be closed.
- **Reopening the Linked Tickets:** If all children and parent tickets are closed, but the agent has opened a child ticket, then that child ticket and its parent ticket will re-open. However, other child tickets will remain closed.

  In this case (when the Parent ticket is being re-opened automatically as any or multiple children tickets are opened, no activity will be dumped in the Parent Ticket. Therefore, it is not possible for the agent to know why the parent ticket is re-opened.

- **Unchanged SLA:** SLA Calculation has not been changed to introduce the linking of tickets through Parent-Children Relationship. Each ticket either parent or child will have its own SLA. If the SLA of parent ticket can be impacted because the Child Tickets are not closed, then the Administrator have to manage the SLA of parent tickets on its own.
- **No Display of Grouping of Tickets in Agent Dashboard and Closed Tickets:** There will not be displayed as a "Group" in the Agent Dashboard and in the Closed Tickets.
- **No Impact in Reports:** The Parent and Child Relationship of the tickets will not be displayed in the Reports.
- **Search:** Both Normal and Elastic Search will display the results in both Parent and Child tickets. If the search keyword is found in both parent and any child ticket, then they will be displayed in the search results.

  If some closed children tickets are being displayed in the search results and the user is clicking that closed ticket, then that closed ticket will open up, however, when the user comes back to the search page then the selection in the search results will not be maintained.

- **Parent-Child Relationship of Tickets across Multiple Queues:** If an agent is not staffed to a queue, then that agent could not access the parent or child ticket assigned to that queue.

8. Ticket Operations

Change = 5

The working and features of Dashboard page is similar for both Supervisor and Agent. However, the Group Manager does not have the privileges to access the Dashboard, as the group manager is not allowed to work in interaction and chat campaigns.

On the Dashboard Tickets page, the user can perform some operations, which are described hereinbelow.

8.1 (Licensable) Reassign Ticket to the same agent

Reassign Ticket to Me" feature can be used by an agent to assign a ticket to itself which is assigned to some other agent. It is useful in the case when another agent has to work on a ticket when the assignee is absent.

<u>Example</u>: Consider another example, a customer reached out on a call and the customer's ticket needs to be updated by the Voice Agent handling the call who does not happen to be the ticket assignee (maybe an Email Agent). The Voice Agent can now click "Reassign Ticket To Me" to assign this ticket to itself.

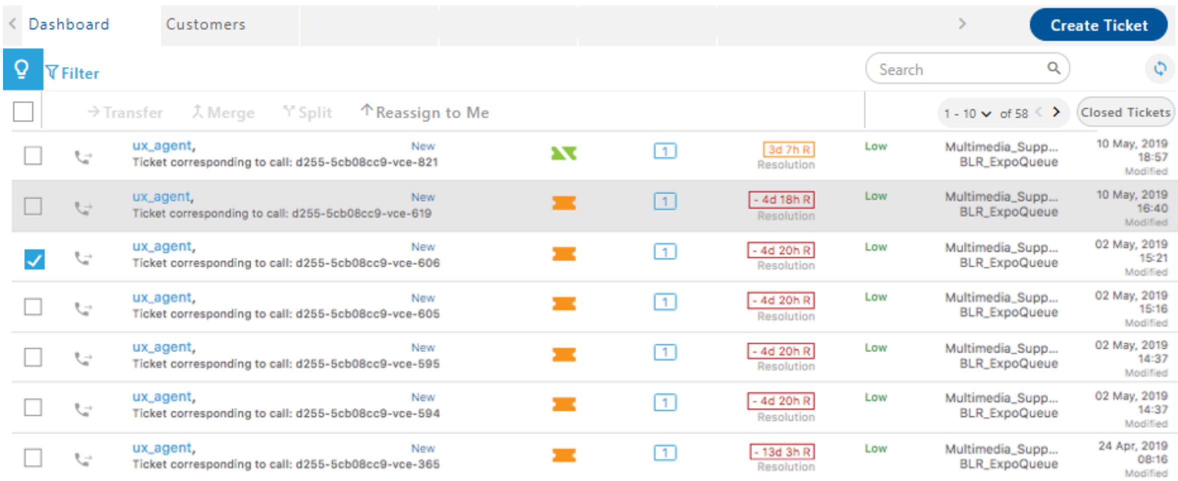


Figure: Option to "Reassign to me" on the Agent's Console

The agent can select the tickets and click "Reassign to me" to reassign these tickets to itself, even if they are assigned to other agents. The activities of ticket reassignment will be maintained in "Activities" section of the ticket. and the backend database. This new feature is independent of "Pick" and "Assign Tickets" feature.

The "Reassign to me" feature is a licensable feature. Hence, to use it ask your administrator to buy the license for it.

8.2 Basic Operations

There are four basic operations which the agent can perform from the dashboard.

1. **Split:** It allows the agent to divide the ticket into two parts. The split feature can be used when there a single ticket contains multiple issues to be resolved by different teams or agents.

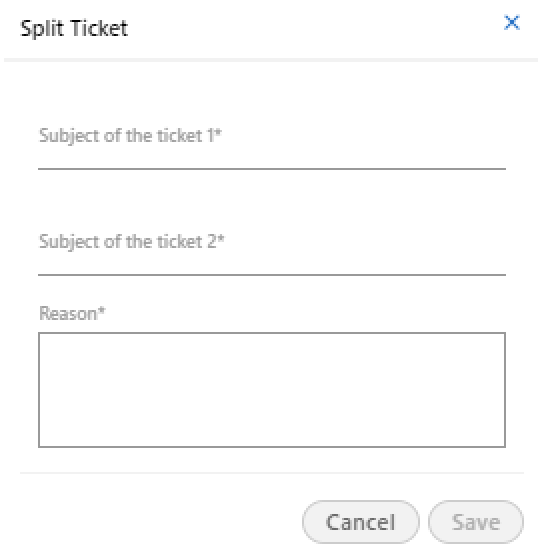


Figure: Split Ticket pop-up

Perform the following steps to split any ticket.

- Click 

 icon to split the ticket. A pop-up comes up.
- Provide the subject for "Ticket 1".

- Provide the subject for "Ticket 2".
- Provide the reason for the splitting of a Ticket.

2. **Transfer:** The transfer option lets the agent transfer the ticket to another queue depends upon the requirement raised by the customer.

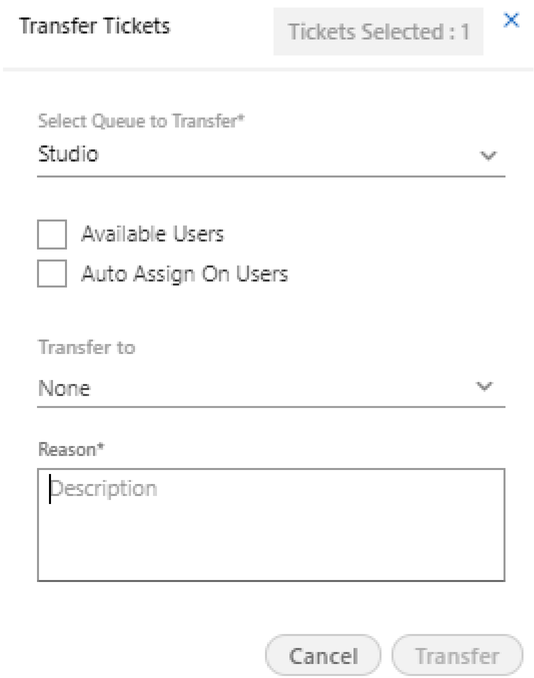
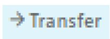


Figure: Transfer Ticket pop-up

Perform the following steps to transfer any ticket.

- Click 

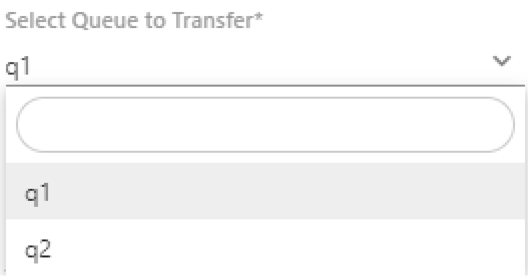
icon to split the ticket. A pop-up comes up.
- Select the Queue name from the drop-down list of Queues. You can search for the queue names by typing the queue name in the search box displayed after clicking the drop-down list.
- 

Figure: Transfer Ticket Search Option

- Enable the "Available Users" checkbox to assign the ticket to any agent who is available at that moment.
- Enable the "Auto-assign On Users" checkbox to assign the ticket to any agent automatically by Ameyo.
- Provide the agent's name, if you want to assign the ticket to any particular agent in the queue specified above.
- Provide the reason for transferring the Ticket.
- Click "Transfer" button to transfer the ticket.

The voice-based customer communication will not be transferred with the transfer of the ticket. So, make sure to transfer the ongoing call to transfer to the same agent to which you are transferring the ticket.

3. **Merge:** There are several cases when a customer raises a query for multiple times with either different subject or from different numbers or media profiles, but the ticket belongs to the same customer and hence increases the number of the tickets. In such cases, the same tickets can be merged to single tickets. This can be done with the help of "Merge" option. It helps to merge the same type of tickets to the single tickets and hence helps to reduce the number of tickets.

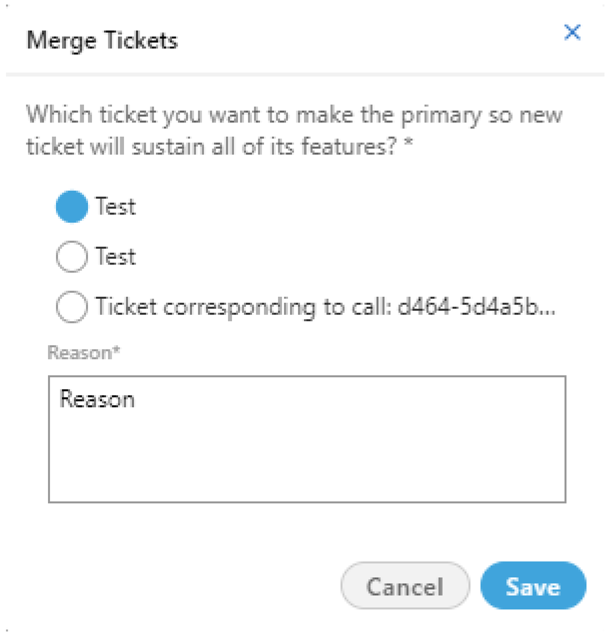


Figure: Merge Ticket pop-up

Perform the following steps to merge multiple tickets to a single ticket.

- Select the tickets which can be merged into single tickets.
- The "Merge" icon will only enable after selection of multiple tickets. If you select only one ticket, then the icon will not be available.
- Click Merge icon to merge tickets. A confirmation pop-up comes up.
- Select the main ticket in which you want to merge all tickets into one.
- Provide the reason for which you are trying to merge the tickets.
- Click Save button.

4. **Pick:** The "Pick" option lets you pick any ticket manually which is not assigned to you. If the ticket is not assigned to the agent then the agent cannot perform any operation on the ticket.

The key difference between an agent and the supervisor is that the agent can pick ticket but can not assign the ticket to another agent, whereas the supervisor is able to pick the ticket and is also able to assign the ticket to the agents.

Perform the following steps to pick any ticket.

- Select the ticket which you want to pick.
- Click ↑Pick icon.
- The ticket is now picked and you can perform all the operations of the ticket on it.

Pick Ticket" feature can only be used only for tickets that are not assigned to any agent. If the ticket is assigned to any other agent, then pick option will remain disabled.

8.3 Information on Mouse Hover

Agent can see the ticket information on the mouse hovering. The agent has to take his mouse cursor on the red box named "Resolution".

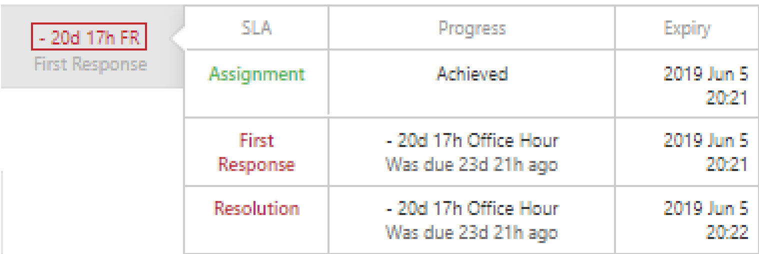


Figure: Mouse Hover Information

The agent can see the following information on the mouse hovering tab.

SLA	Progress	Expiry
It shows the Assignment of the ticket.	It shows whether the assignment time is achieved or not.	It shows when the assignment time will over.
It shows the first Response time of the ticket.	It shows when the first response is delivered on the ticket to the customer.	It shows when the first response time will expire for the same ticket.
It shows the Resolution	It shows from when the ticket is	It shows when the resolution time

time of the ticket.	lying in the same state.	will expire for the same ticket, it means the agent has to change the state of the ticket from the given time.

8.4 Information on Ticket Bar

On the dashboard, all the tickets show in the list format, in which every ticket has a separate bar. On this ticket bar, some information is listed, through which the agent can identify some information about the ticket without opening to it. Agent can see the following information on the ticket bar.

Figure: Ticket bar of one Ticket

Nisha

1. **Ticket ID:** It shows the unique ID of the ticket which was assigned to the ticket while creating.
2. **Ticket icons:** There are different icons for the different types of tickets received or send to the customer. Some of the icons which used most frequently are:
   - **Email** When the ticket received through "Email" then icon shows and, if an email is sent then icon shows in front of ticket bar.
   - **Fb Messenger** When the ticket received or sent through "Facebook Messenger" then icon shows in front of the ticket bar.
   - **Facebook Post** When the ticket received or sent through "Facebook Post" then icon shows in front of the ticket bar.
   - **Manual Message** When any ticket is created manually then icon shows in front of the ticket bar.

- **Whats App** When the ticket received or sent through "WhatsApp" then icon shows in front of the ticket bar.
- **Viber Chat** When the ticket received or sent through "Viber" then icon shows in front of the ticket bar.
- **Mobile App** When the ticket received or sent through "Ameyo Mobile App" then icon shows in front of the ticket bar.

3. **<u>Agent and Customer Name</u>:** It shows the agent name who has been assigned for the ticket and the customer name who sends the ticket to the organization.
AM3
Missed Chat from: Yousuf Sarfaraz
4. **<u>Ticket State</u>:** It shows the state of the ticket in which the ticket is currently present.
New
5. **<u>Heat Value icon</u>:** It shows the icons of heat value, the heat value which calculates at every instant of time.
6. **<u>Ticket Number</u>:** It contains the total number of messages sent and received from the same customer. 4

   It is a clickable icon. Click on the ticket number icon to list all the messages append on the same ticket. After clicking, it shows the following screen.

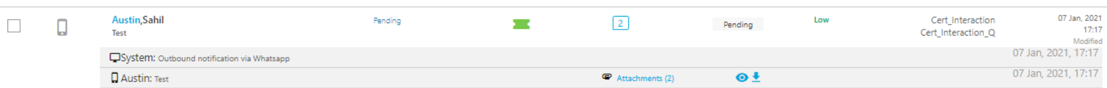
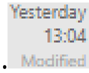


Figure: All Message List after clicking Ticket Numbers

   After the message list, you can click any message to check it completely.

7. **<u>First Response Time</u>:** It contains the date and time of the first response on the ticket. - 15d 4h FR First Response
8. **<u>Ticket Priority</u>:** It shows the priority of the ticket. Low
9. **<u>Interaction Campaign Name and Queue Name</u>:** It shows the campaign name and the queue name in which the ticket arrived first. Abhi_IC Tom_IC

10. **<u>Date and Time of Last Action</u>:** It shows the date and time of the last action which has been performed on the ticket along with the action performed on the ticket like modification, creation, and so on. 

8.4.1 Preview the uploaded Attachments

It is a hectic task for an agent to view the attachments uploaded in the ticket by the customer in the ticket. It becomes more complicated when there are multiple tickets. To view all of the attachments, the agent has to download all the attachments one by one, and then only he can view them. Thus, to simplify the agent's task, Ameyo has introduced the Preview option for the attachments.

The agent can now click and view the attachments uploaded by the customer in the ticket without downloading them. However, the downloading task has the same feature as earlier. While previewing the attachment, the agent can also download the attachment directly from the previewing option, if required. The preview option will be available for all types of tickets, irrespective of their chat channels.

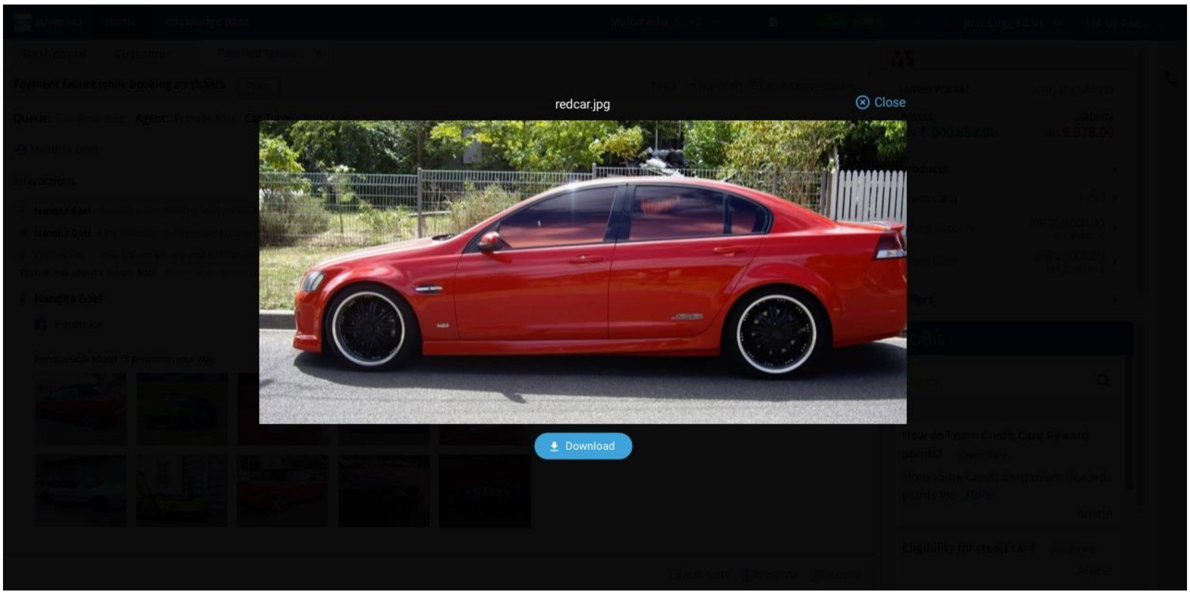


Figure: Preview the Attachment in the Ticket

The following are the features available while previewing the attachments.

1. The agent is able to download the attachment while previewing it.
2. The agent can zoom in/out the attachment.
3. The name of the file is also visible while previewing the attachment.
4. Arrow buttons to view next or previous attachments are also available.
5. If a file has been uploaded, the agent can scroll down to view the attached file's pages.
6. If a video file is uploaded, the agent can play and pause the video.

".png", ".jpg", ".jpeg", ".pdf", "mp4 " are the file types that are supported for previewing.

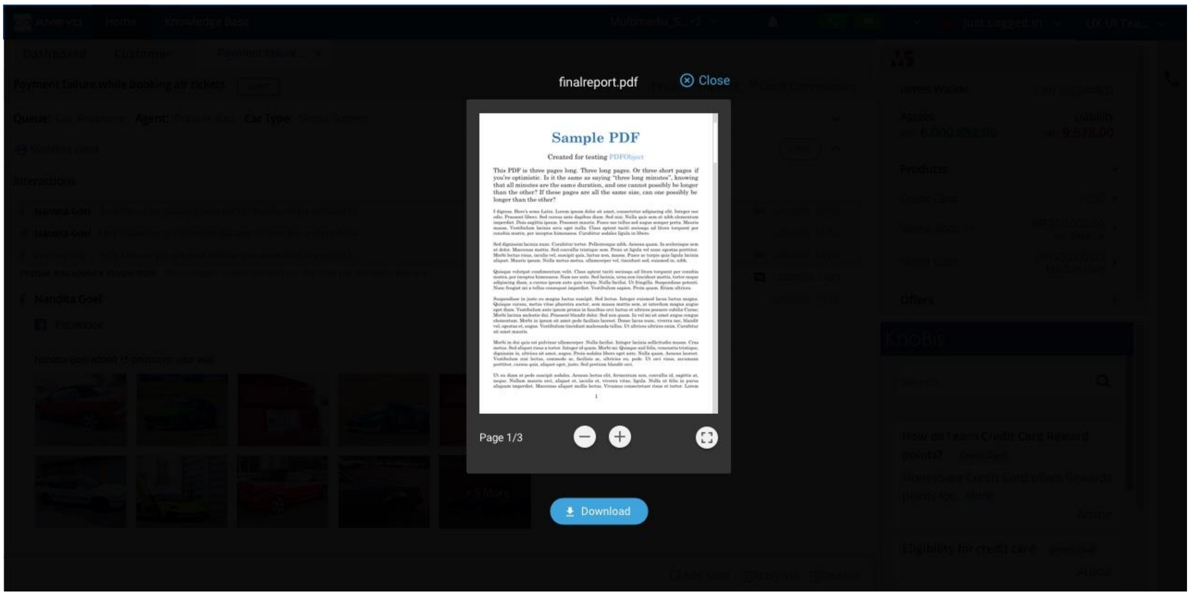


Figure: Preview of the File type Attachment

While previewing the attachment, the download button allows the user to download the attachment.

An "eye" icon will be displayed adjacent to the ticket's attachment name, at which the agent can click for the preview.

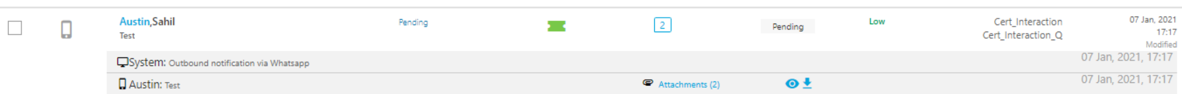


Figure: Eye Icon to Preview an Attachment

9. Manage Customers

The working and features of manage customers page is similar for both Supervisor and Agent. However, the Group Manager does not have the privileges to access the manage customers from workbech, as the group manager is not allowed to work in interaction and chat campaigns.

Customer Tab in the Agent Interface shows the list of customers. It allows the agent to manage the customer's information and access them. Click "Customers" icon present adjacent to the Dashboard icon, to access the customer's page.

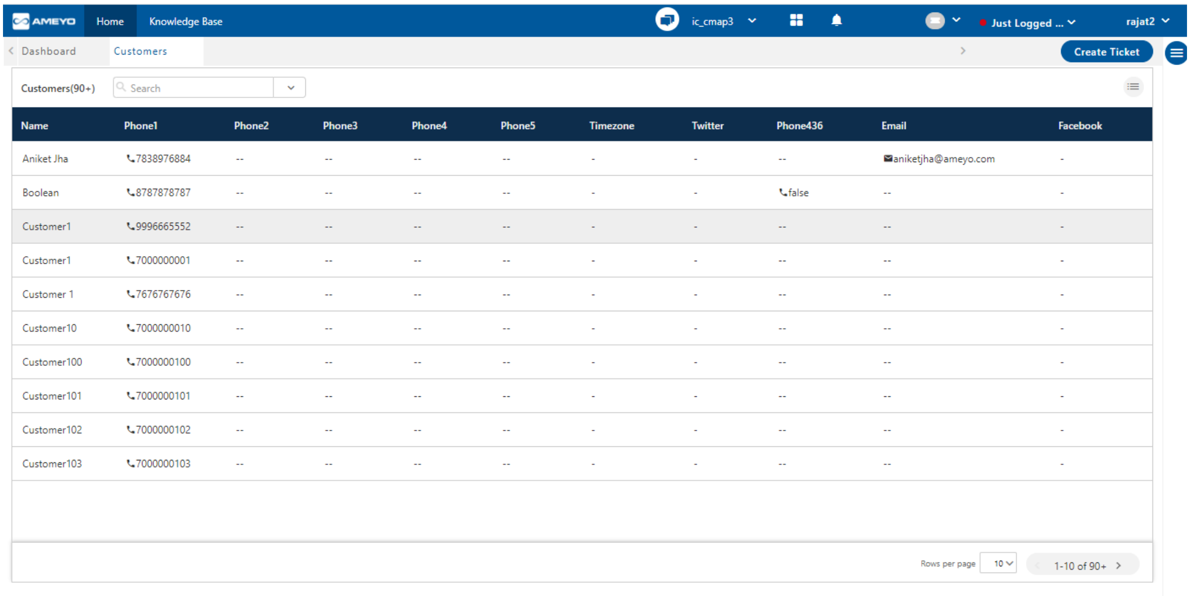


Figure: List of Customers

Each customer is listed in an individual row. Following information of customer is available on this page.

1. **<u>Customer Name</u>:** The first column of the customer information contains the name of the customer's name.
2. **<u>Phone</u>:** This column of the customer information contains the phone number of the customer. Here, all the phone fields such as Phone1, Phone2, Phone3, and so on; that the administrator has created at system level is showing

3. **Email ID:** The Email ID column of the customer information page contains the email-id of the customers.
4. **Timezone:** The Timezone column shows the timezone in which the customer is present.
5. **Media Channel ID:** The Media channel Id includes the Facebook, Instagram, Twitter, Messenger, and Google Play Id of the registered customer. If the media channel ID of the customer is not registered in the system, then it will show blank.

9.1 Operations

Agent can perform the following two operations on the customers page.

1. **Customer's Information:** Click on the customer's name, a page opens up with the complete customer's information.

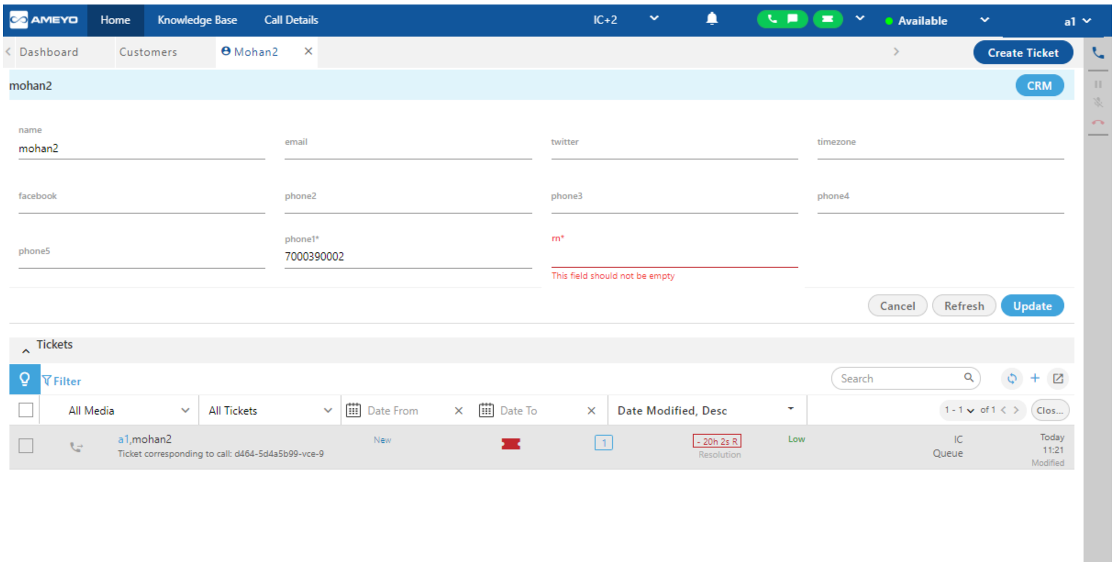


Figure: Information of Customer

Error Messages: If the agent does not fill a mandatory field, then an inline error message will be shown in red color just below that field. As a result thereof, the agent will not be able to save the details of the customer.

Agent can perform the following operation on the customer's information section.

- **View Customer's information:** The first column of this page shows the customer's personal information. Agent can view the details or modify them if needed.

  The Agent Table Definition allows the Administrator define the order of appearance of the customer information fields and mark the fields in which the agent can change the values or not.

  The Administrator can create multiple Agent Table Definitions using a single Data Table Definition for a process. It means there can be multiple Agent Table Definitions for a Campaign. The Administrator can assign the agent to a particular Agent Table Definition for a Campaign, and that agent will view the Customer Information Fields as per the selected Agent Table Definition and can modify the customer information in the editable fields only.

  Important Points

  - An agent can be assigned to one Agent Table Definition in one campaign and to another Agent Table Definition in another campaign. For example, agent1 can be assigned to "ATD1" in Voice1 and "ATD2" in Voice2.
  - If the agent is staffed to the multiple campaigns, including an Interaction Campaign, then the Agent Table Definition of the Interaction Campaign will be used on top of other Agent Table Definitions.
  - If the agent is staffed to only Voice Campaigns, then the Agent Table Definition of that Voice Campaign will be applicable in which the call has been made or received.

- **Edit Customer's information**: Click "Edit" button to modify the customer's information. The customer's information is now editable. Change or add the information which you want to change.

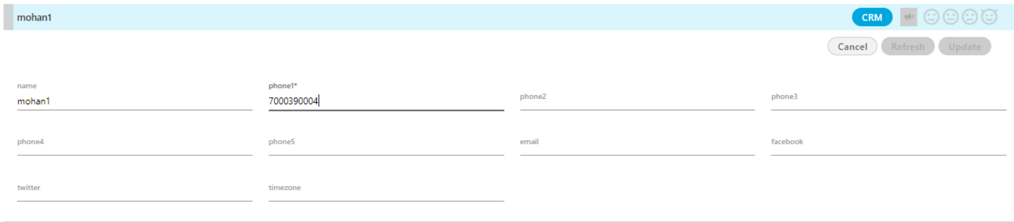


Figure: Edit Customer Information

Click "Update" button to save the changes made, else, click "Cancel" button to cancel the changes. Click "Refresh" button to refresh the customer's information.

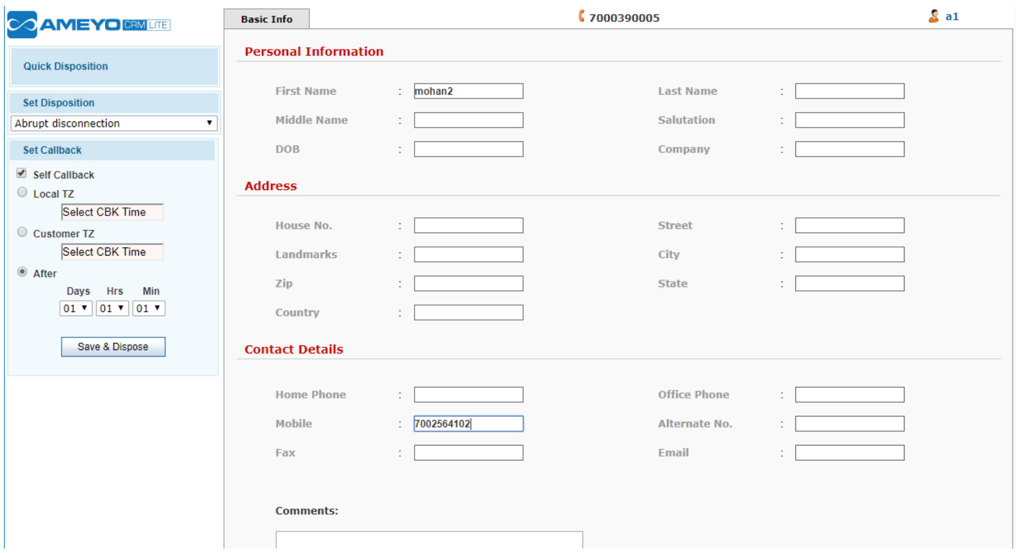
- Customer's Information on CRM: Click "CRM" button present on the top of the customer's information bar to see the customer's information on the CRM(if integrated on Ameyo). The complete information of the customer is available on the CRM page. Agent can change view or change the information according to the usage.
- 

Figure: Customer Information on CRM

2. Ticket Dashboard: In the "Tickets" section, all the tickets raised by the same customer visible only. It contains the same ticket dashboard but contains only the tickets of the specific customer. Agent can perform the same operations here like ticket dashboard. Know more...

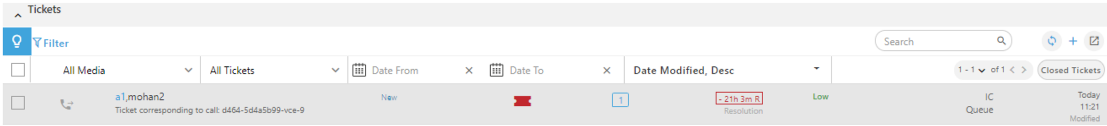


Figure: All tickets of the opened customer

Agent can perform the same operations on the present tickets raised by the customer. Know more...

The agent is able to manage the customer information for the tickets attached with calls. Know more...

If there are multiple customers with the same number and CustomerQuery Node is used in the inbound nodeflow, then a modal is displayed to the agent that displays all customers with the same phone number. When the agent clicks a number and click "Link" button, the customer is linked, but the name of the linked customer is not displayed in "name" field of the Customer Information. This issue has been fixed now. Now, when the agent links the customer in the modal displaying the multiple customers for the same phone number, then the name of the linked customer is being displayed in the "name" field of the customer information.

10. Manage Customer Communications

10.1 Manage Customer Communications

The agent can manage following types of communications with the customers. Click the links to know more about them.

- Email
- Chat
- Voice

10.2 Email Communication with Customer

The supervisor can communicate with customer using Email chat, and the working and features are similar for Supervisor as that of the agent. However, the Group Manager does not have the privileges to communicate with Email mode with customer, as the group manager is not allowed to work in interaction and chat campaigns.

Whenever an email is sent or received from the registered email address of a customer, a new ticket is created. All the operations can be performed on the email ticket which can be performed on the normal ticket.

10.2.1 Send New Email to Customer

Perform the following steps to send an email. There are some initial steps that are different for registered customers and non-registered customers.

10.2.1.1 For Registered Customers

1. Go to "Customers" tab.
2. Search the customer and click on the name of the customer, to whom you want to send the email.
3. Click "+" icon present in the section of the ticket. A new page opens up.

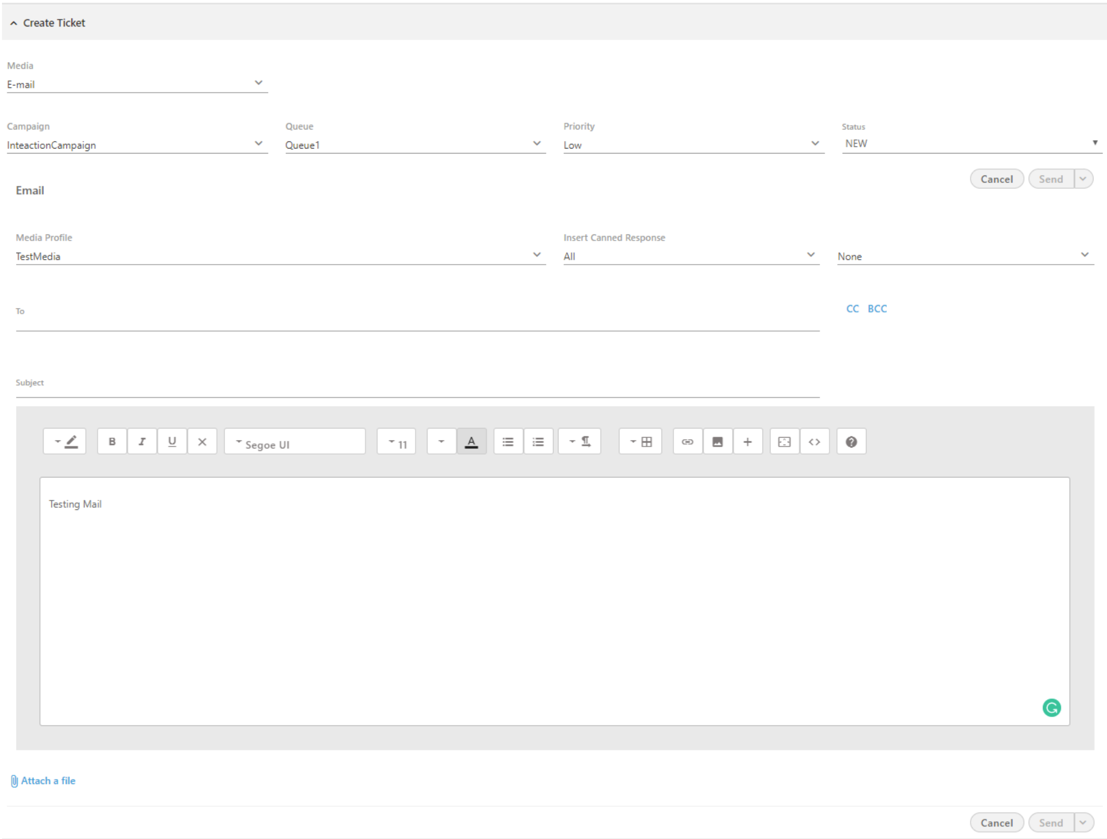


Figure: Create Email Ticket

4. **Media:** From the drop-down of the Media section, select E-mail as the Media Profile.
5. **Campaign:** Select the campaign from the drop-down list of available campaigns.
6. **Queue:** Select the queue from the drop-down list of available queues.
7. **Priority:** Select the priority type of the ticket from the following priorities from the drop-down list.
    - **Low:** It means that the ticket is on the low priority and is not urgent.
    - **Medium:** It means that the ticket is on the medium priority and is less urgent.
    - **High:** It means that the ticket is on the high priority and is urgent to resolve.
8. **Status:** Select the status of the ticket from the drop-down list. The status in the drop-down list depends upon the statuses created by the administrator.

9. **Media Profile:** Select the media profile from which you want to send the email to the customer.
10. **Insert Canned Response:** Select the Canned Response type which you want to insert in the e-mail.
11. **To:** Enter the email address of the customer. You can enter multiple email addresses separated by comma(,).
12. **CC:** Click "CC" icon to insert the email address of the recipients to whom you want to send the email.
13. **BCC:** Click "BCC" icon to insert the email address of those recipients as BCC.
14. **Subject:** Provide the subject of the message.
15. **Main Content:** Enter the text of your email in the text box.
16. **Attach a file:** Click "Attach a file" button to attach a file with your email. A pop-up opens after clicking on the button.

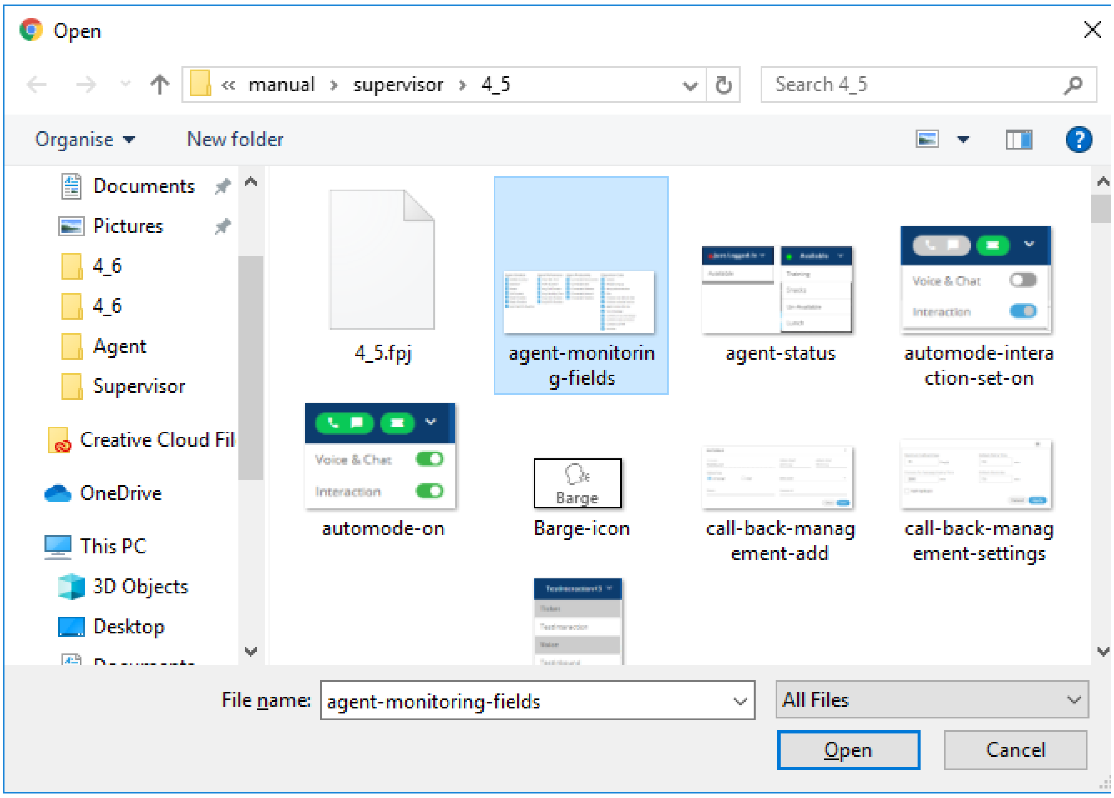


Figure: Attach File

Select the file which you want to attach, and click "Open" button. If the file successfully uploaded, then "Done" sign appears, else failure will occur if the file does not uploaded successfully. You can attach multiple files as well.

Following file types are supported for attachments with Notes.

.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 Public or Private Note is 25 MB.

17. **Send and change state of the ticket:** Click the Send button to create the ticket in open state. If you want to change the state then, click icon and select the state which you want to select. The states appearing in this option are similar to the above states defined in the point number 8.

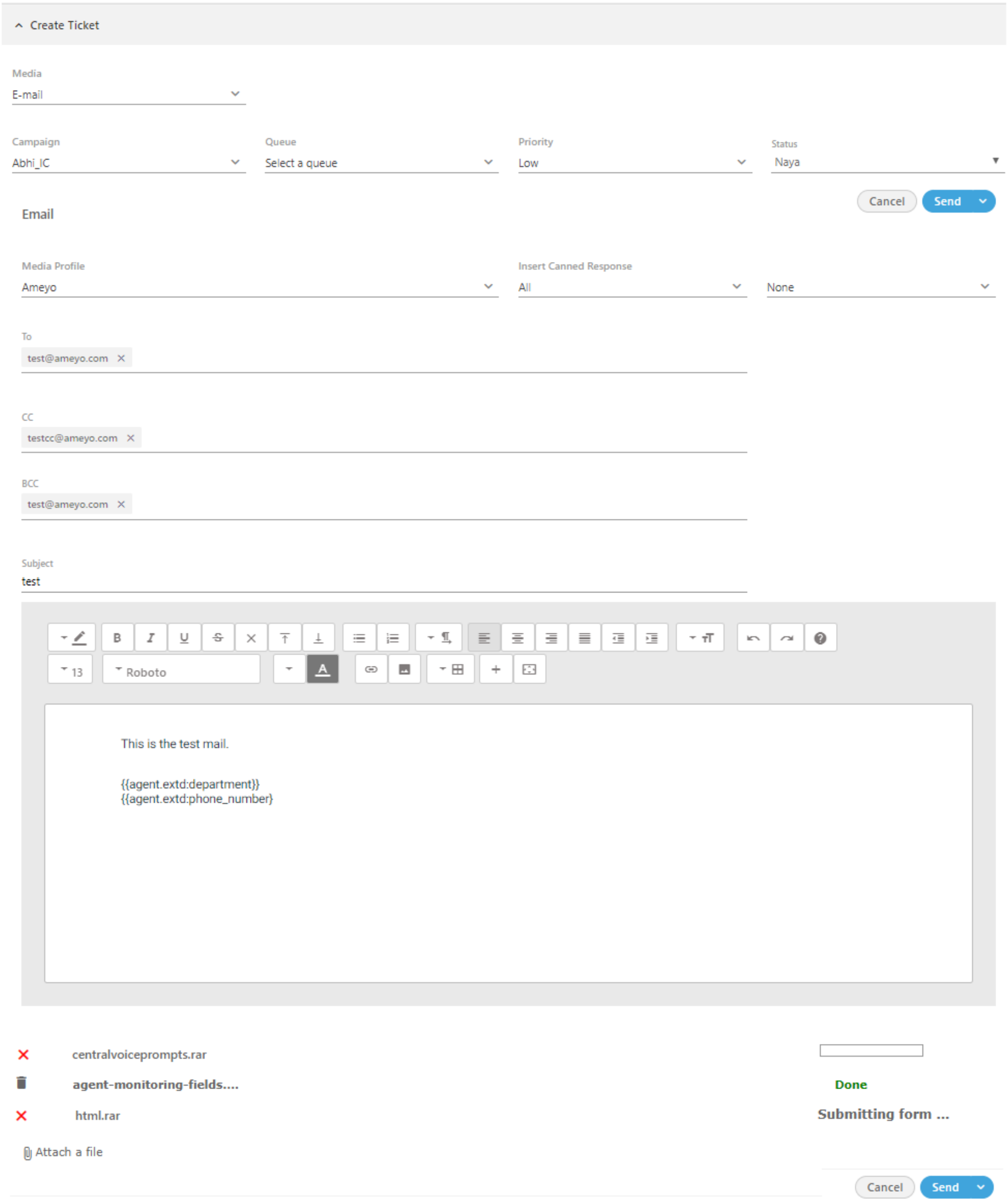


Figure: Sample Email Ticket

The user can click "X" icon to cancel the uploading of the attachments during the uploading process. Even after attachment, the user can delete the attachment be clicking the delete icon.

Agent can insert the numbered list in the email.

10.2.1.2 For non-Registered Customers

1. Click on "Create Ticket" button present on the right-hand corner of the page.

2. On the new opened page, provide the customer's information in customers tab and perform the rest steps as shown above.

A ticket corresponding to the email is created on the dashboard.

10.2.2 Receiving Email

Whenever a customer sends the email to the organization, a new ticket corresponding to the campaign and the queue will create. The agent can view the email tickets on the dashboard and can reply on them as well.

10.2.3 Reply on Email Ticket

Click on the email ticket received from the customer. Following page opens up.

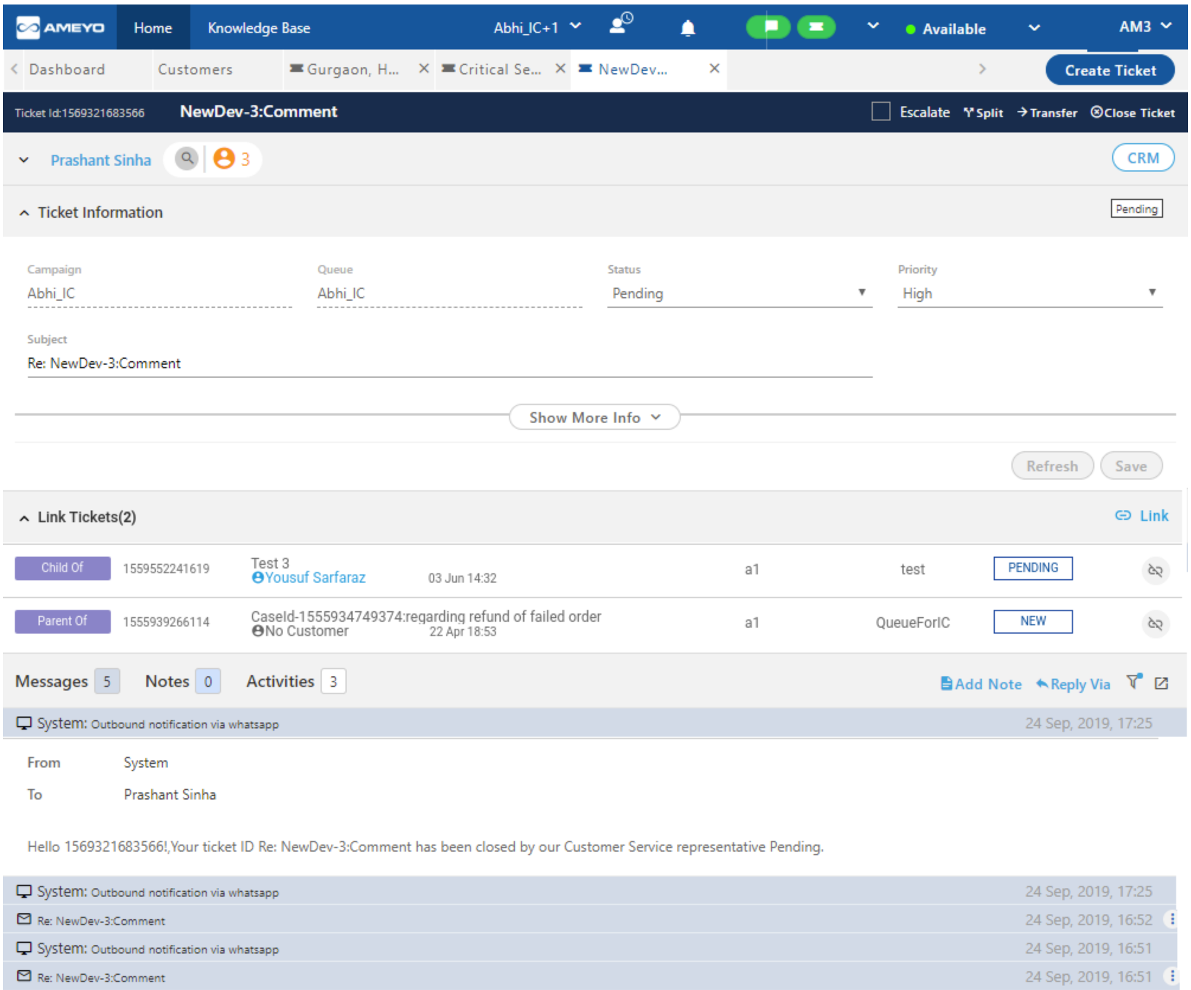


Figure: Customer's Email Ticket

Following operations can be performed on the received email ticket.

1. **Basic operations:** There are four basic operations which agent can perform on the tickets received from the customer.

   A. **Escalate:** Enable the "Escalate" checkbox to escalate the ticket to the higher authority like the supervisor.

   B. **Split:** It allows the agent to divide the ticket into two parts. The split feature can be used when there a single ticket contains multiple issues to be resolved by different teams or agents.

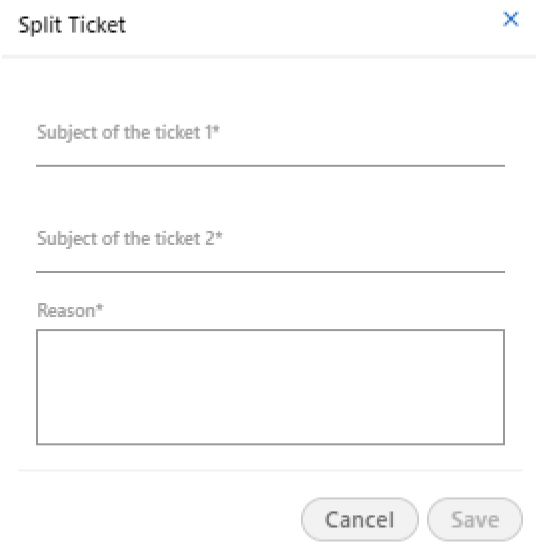
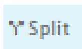


Figure: Split Ticket pop-up

Perform the following steps to split any ticket.

- Click  icon to split the ticket. A pop-up comes up.
- Provide the subject for "Ticket 1".
- Provide the subject for "Ticket 2".
- Provide the reason for the splitting of Ticket.

   C. **Transfer:** The transfer option lets the agent to transfer the ticket to another queue depends upon the requirement raised by the customer.

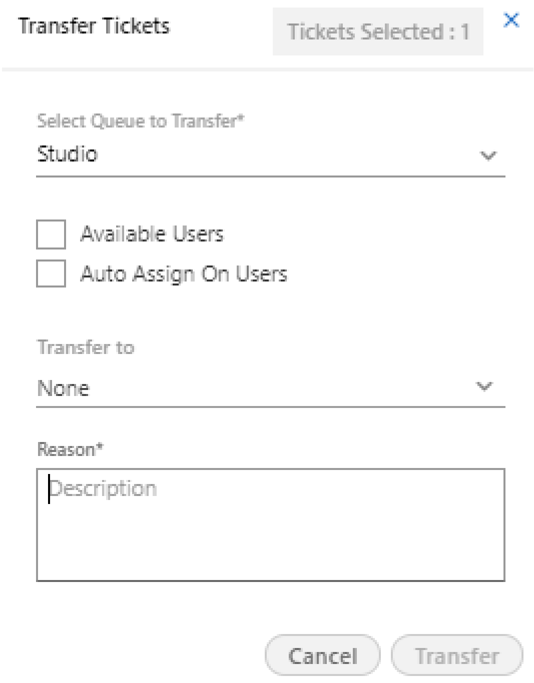
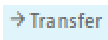


Figure: Transfer Ticket pop-up

Perform the following steps to transfer any ticket.

- Click  icon to split the ticket. A pop-up comes up.
- Select the Queue name from the drop-down list of Queues.
- Enable the "Available Users" checkbox to assign the ticket to any agent who is available at that moment.
- Enable the "Auto-assign On Users" checkbox to assign the ticket to any agent automatically by Ameyo.
- Provide the agent's name, if you want to assign the ticket to any particular agent in the queue specified above.
- Provide the reason for the transferring the Ticket.
- Click "Transfer" button to transfer the ticket.

D. **<u>Close Ticket</u>:** Click "Close" ticket button to close the ticket. After clicking on the close ticket option, a pop-up comes up.

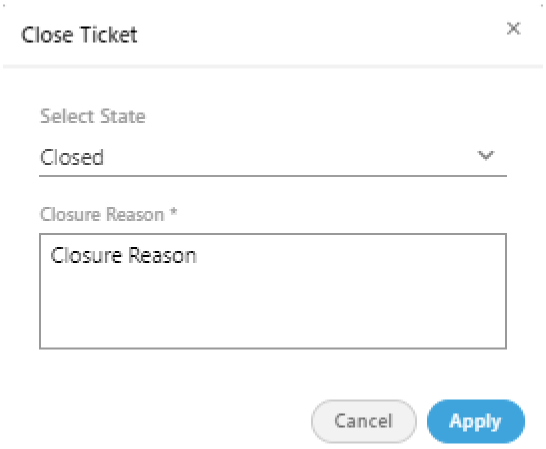


Figure: Closing Ticket

- Select the status of the ticket from the drop-down menu of the state. Agent can select one of the states which are created under the closed state by the administrator.
- Provide the "Closure Reason" for which you are trying to close the ticket.
- Click "Apply" button.

2. **Customer Information:** The first section of the page contains the information of the customer. Agent can view or modify the information. Know more…
3. **View Customer Cards:** If more than one customer is created with the same information, then number of such customers with same information will be displayed with icon. You can click this to view the customer cards.

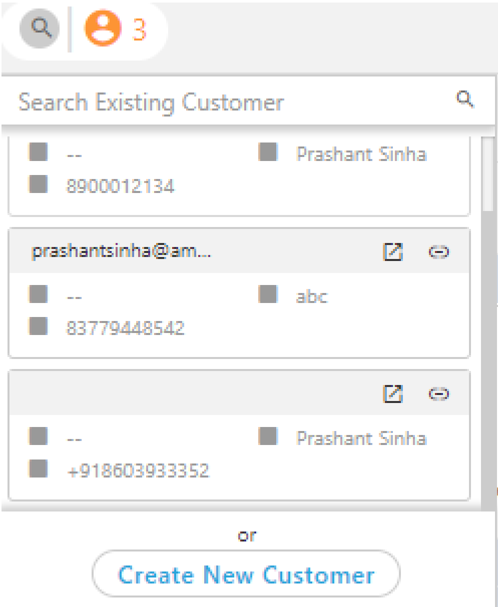


Figure: Customer Cards

Here, the agent can click to view the Customer Information in a new tab. You can also click icon to link this customer with other customer having same information.

You can search for the customers, if more than one customer is created using the same information.

If the customer is new and needs to create a new customer with the provided information, then click "Create New Customer" icon. After clicking the icon all the details will be automatically filled into the customer information tab. Fill all the information and click "Create" button to create new customer.

4. **Ticket Information:** It contains the information of the ticket which involves the following fields.

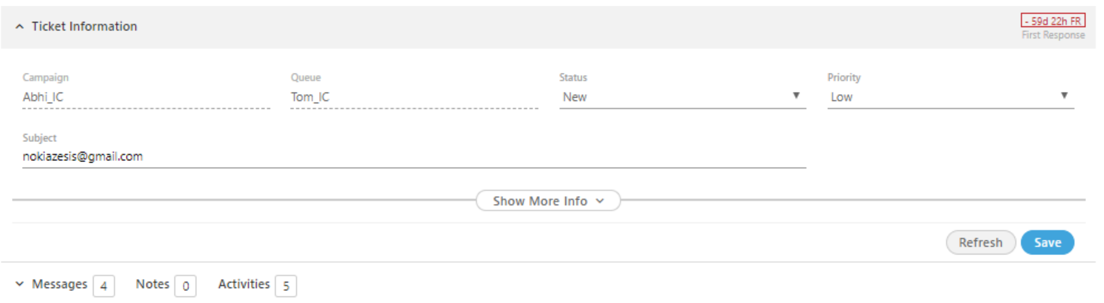


Figure: Ticket Information

A. **First Response:** It shows the first response on the ticket. First response is the time is the time when the first response has been delivered to the customer. It shows on the right side of the ticket information bar.

B. **Campaign:** It contains the name of the campaign in which the ticket has been arrived.

C. **Queue:** It shows the queue name in which the ticket has been arrived.

D. **Status:** It shows the status of the ticket. You can change the ticket status from here. Select the status which you want to set.

E. **Priority:** It shows the priority of the ticket. Agent can change the priority of the ticket from here as well. Select the priority of the ticket from the drop-down menu.

F. **Subject:** It contains the subject of the ticket.

G. **Show More Info:** Click "Show More Info" button to view more information of the ticket. It contains the custom fields created by administrator. If there are no custom fields then there will not be any fields.

   You can hide this custom information of the customer. Click "Show Less Information" button to hide this section of the information.

5. **Link Tickets:** The link ticket section allows the agent to link multiple tickets with each other. In this, a parent ticket is linked with its subordinates tickets which treats like child tickets for the parent tickets. Know more...

6. **Messages:** It contains the complete list of messages sent by customer through email.

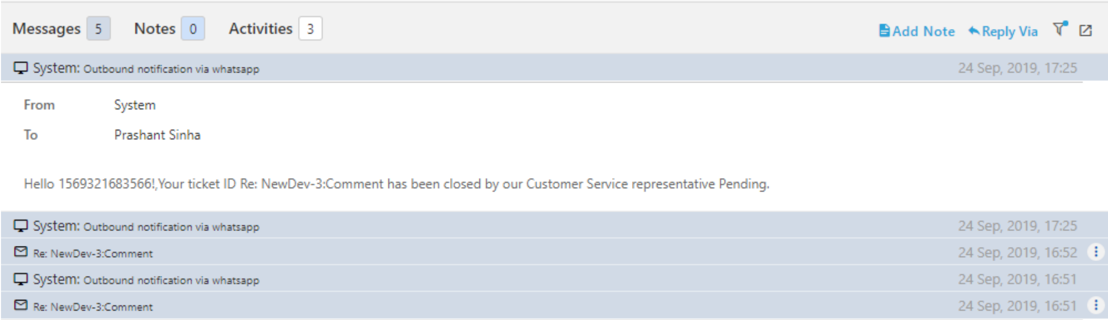


Figure: Message of Customer in Email Profile

Agent can perform the following operation on the message section.

A. **Read Message:** Agent can simply read the message sent in the email.

B. **Message count:** The message count Messages 1 represents the total number of the emails sent through the customer.

C. **Notes:** The notes count Notes 0 shows the total number of the notes which has been given on ticket of the customer.

D. **Activities:** The activities count Activities 0 shows the total number of the activities performed on the ticket.

E. **Export Tickets:** Export tickets option provides the feature to save all the tickets in CSV format to agent's system. Perform the following steps to export tickets.

- Click Export Tickets icon to export all the email tickets of the customer.
- A pop-up opens up, which allows agent to download folder on specific location.

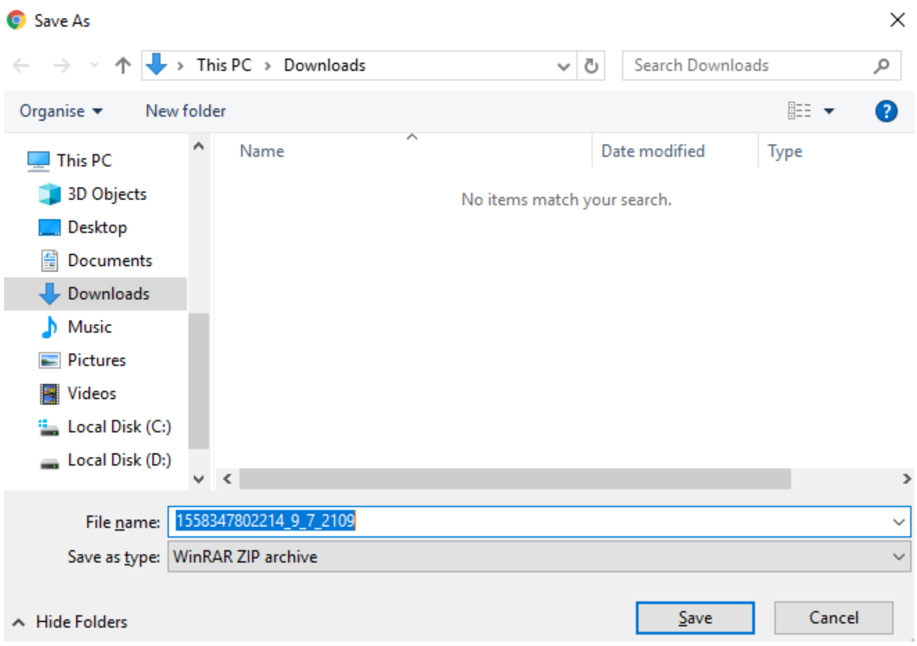
- 

Figure: Export Email Tickets

- On the opened pop-up, provide the name of the file, if you want to change, it contains the default name of the file contains the date and time of the email ticket arrived at the system.
- Click "Save" button.

F. **Add Note**: Click Add Note icon to provide the note on the ticket. After clicking on the icon, following wizard opens up.

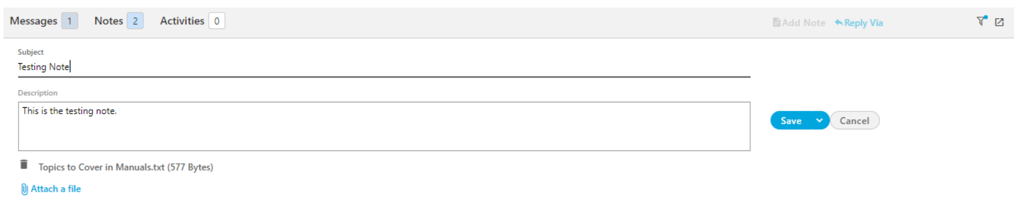


Figure: Enter Note

Private Note: When the agent wants to provide the note only for the personal use, then a private note can be applied. The private note is visible to all the agents and supervisors who are assigned in that campaign.

By default, a note is marked as private, until the status of the toggle button is not changed. For private note, enter the subject and description of the note and click "save" button.

The agent can click "Attach a file" link to upload any file with the note as well.

G. **Filters:** If there are more than one message send by the customer, then agent can filter the messages according to the need.

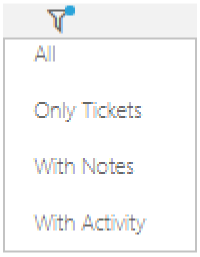


Figure: Filter the Messages

Following filters are available. By default, "Only Tickets" filter will remain selected that will show only ticket messages and no notes will be displayed.

- **All:** It shows all the tickets and notes send by the customer.
- **(Default) Only Tickets:** It filter those messages which are considered as tickets.
- **With Notes:** It shows all the tickets with all notes provided. If the note is provided on any ticket, then agent has to apply this filter to view the note on the ticket. After the
- **With Activity:** It filter those messages on which some activity has been performed.

- You have to select "All" or "With Notes" filter to show the notes.

H. **Access a Note:** Select "All" or "With Note" filter to access the notes. All the tickets and notes are visible as the collapsible sections.

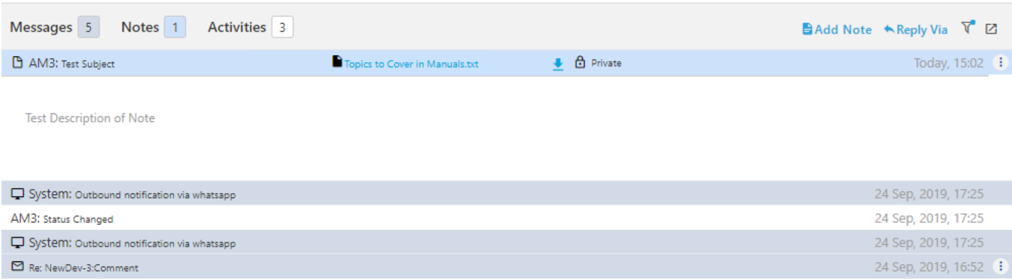


Figure: Ticket with the Note

Click 

icon to download the attached file with the note. A downloading pop-up will be displayed, through which the agent can save the attachments in its computer.

I. **<u>Update and Delete a Note</u>:** Click ⋮ icon to update or delete the note.

All the agents and supervisor assigned in the same Interaction Campaign, can update and delete both public and private notes on the assigned ticket.

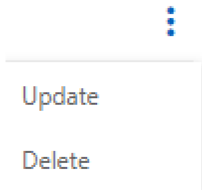


Figure: Options to Update or Delete the Note

It shows the following two options.

- **Update:** Click "Update" button to edit the note inline.

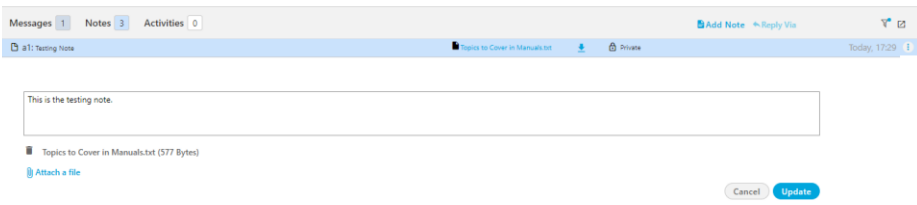


Figure: Update Note

"Update" button only be visible once the agent changes the note. Click "Update" button to save the changes.

The agent can also attach or detach the attachments with the notes from here.

- **Delete:** Click it to delete the note. A confirmation pop-up is displayed.

  If the note is deleted, then it cannot be retrieved in any manner. It will be deleted permanently.

  The following screenshot shows the confirmation message before deleting a private note.

Figure: Confirmation pop-up

Click "Delete" button to delete the note permanently, else click "Cancel" button.

J. **Reply:** Click ⋮ icon to reply to the customer on the ticket. The actions on this icon depends upon the media profile type. Click "Reply via Email" to send the reply to the customer through email.

Figure: Reply on Email Ticket

Provide all the necessary details used while creating the email ticket and click "Send" button.

K. Send Options: Agent is now able to send and change the state of the ticket simultaneously, by just clicking on "Send" button and selecting the state of the ticket. The agent has to select the status of the agent manually. It will not be filled automatically.

Click icon present adjacent to send button. It shows the complete list of state which has been configured by the administrator.

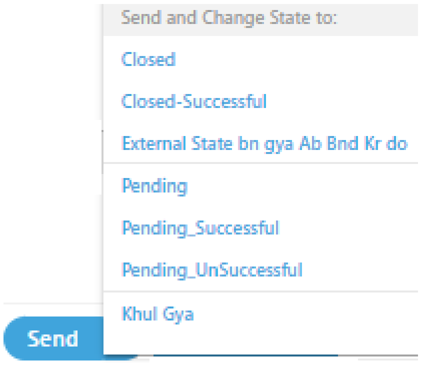


Figure: Send and change State of Ticket

Select the state and click send button. It changes the state and send the reply to customer simultaneously.

Click "Send & Close" button to send the reply and close the ticket simultaneously.

During the reply on the email ticket "RE" will not be prefixed to the email subject while replying to the customer's email through the ticket. As a result thereof, there will be only one email thread containing all email messages.

10.2.4 Identification of Email Tickets.

There are two following cases of Email tickets from which the ticket can be created.

- When the Email is sent by the agent then, the  icon is displayed in front of the ticket. The icon shows that the email is sent by the agent.
    - 

Figure: Incoming Email being displayed with inbound icon

- When the Email is sent by the customer then, the icon is displayed in front of the ticket. The icon shows that the email is sent by the customer.
- The following screenshot shows the identification of outgoing emails.

Figure: Outgoing Email being displayed with outbound icon

Following screenshot shows both incoming and outgoing emails.

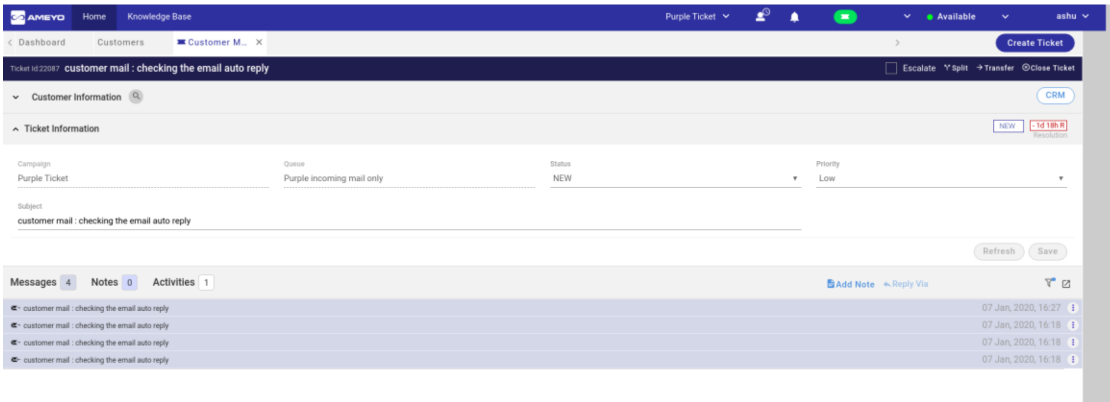


Figure: Messages in a Ticket

10.2.5 Attachments

The agent can attach the files while replying to the customer. The support of the attachments is present for the following areas.

- Replies through Email
- Public and Private Notes
- Manual Messages to Customers

10.2.6 Acronyms

The agents can now use the Acronyms in the messages in the following places.

- Facebook Comments, and Messenger Replies
- Twitter Reply, and Direct Messages

- In the description of Notes
- Reply via email in Chat
- Chat Window on Agent-side
- In Email, Acronyms will work in Body of the Messages
- Closure Reason under Split, Merge, Close, and Transfer
- Manual Message while creating or modifying Ticket

Acronyms will not work in the following places.

- Subject in the Notes
- Subject in the Email

Know more: "Manage Acronyms" in Agent Console

At the time of manual mail or the reply to the customer, if any loop is detected which makes the system into the endless loop, then the agent will not be able to sent the email through Ameyo. An error template message will be displayed on the agent's console notifies about the same.

10.2.6.1 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

10.2.6.2 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".

10.2.6.3 Preview the uploaded Attachments

It is a hectic task for an agent to view the attachments uploaded in the ticket by the customer in the ticket. It becomes more complicated when there are multiple tickets. To view all of the attachments, the agent has to download all the attachments one by one, and then only he can view them. Thus, to simplify the agent's task, Ameyo has introduced the Preview option for the attachments.

The agent can now click and view the attachments uploaded by the customer in the ticket without downloading them. However, the downloading task has the same feature as earlier. While previewing the attachment, the agent can also download the attachment directly from the previewing option, if required. The preview option will be available for all types of tickets, irrespective of their chat channels.

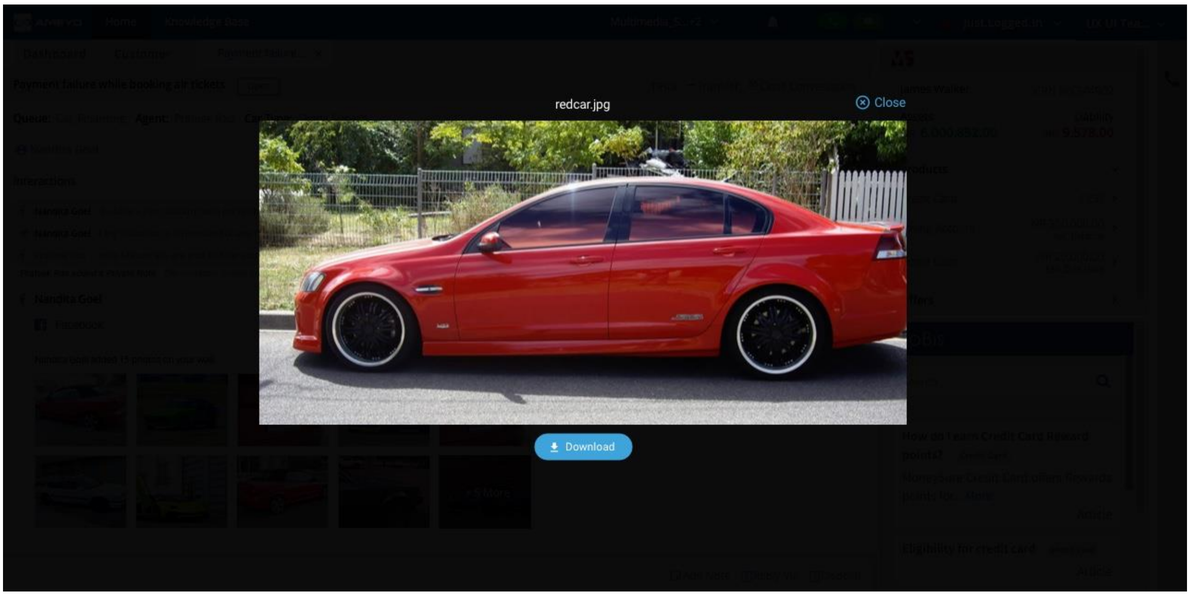


Figure: Preview the Attachment in the Ticket

The following are the features available while previewing the attachments.

1. The agent is able to download the attachment while previewing it.
2. The agent can zoom in/out the attachment.
3. The name of the file is also visible while previewing the attachment.
4. Arrow buttons to view next or previous attachments are also available.
5. If a file has been uploaded, the agent can scroll down to view the attached file's pages.
6. If a video file is uploaded, the agent can play and pause the video.

".png", ".jpg", ".jpeg", ".pdf", "mp4 " are the file types that are supported for previewing.

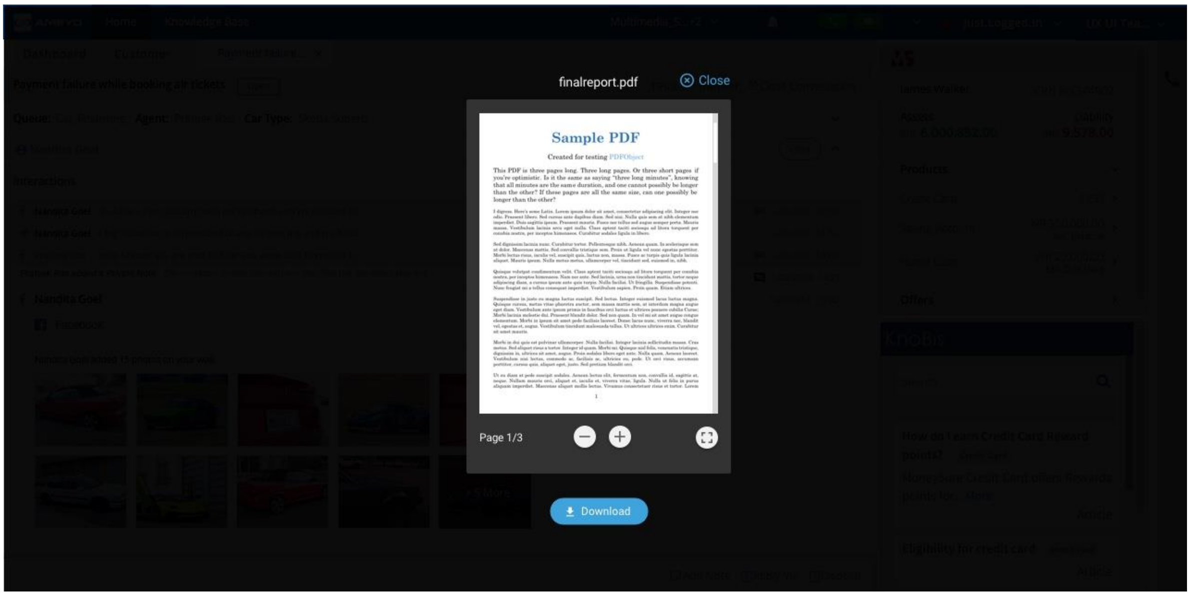


Figure: Preview of the File type Attachment

While previewing the attachment, the download button allows the user to download the attachment.

An "eye" icon will be displayed adjacent to the ticket's attachment name, at which the agent can click for the preview.

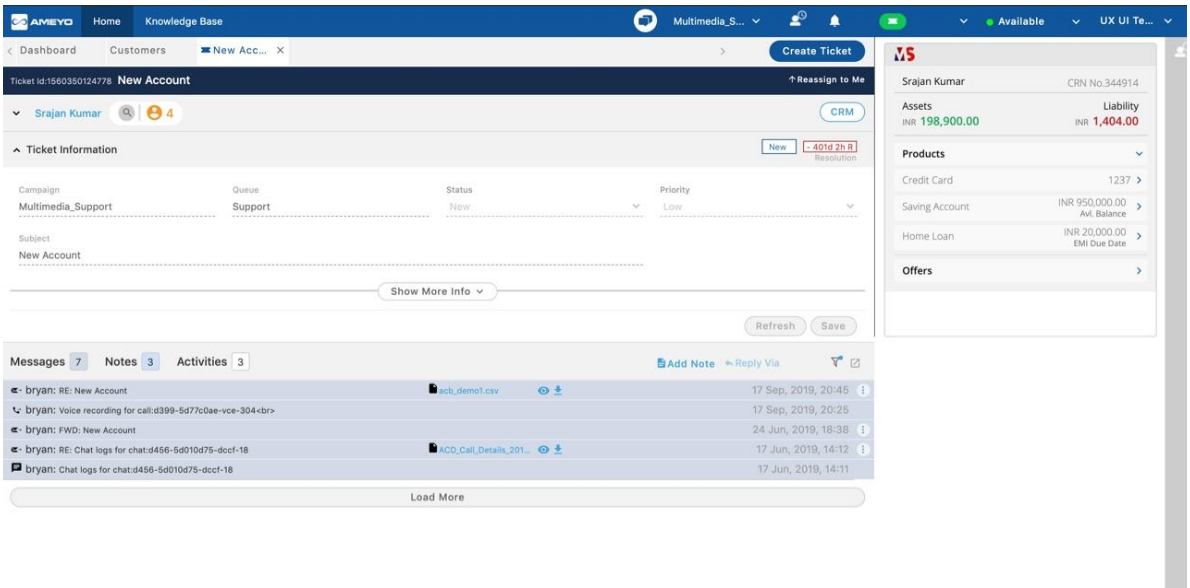


Figure: Eye Icon to Preview an Attachment

10.3 Chat Communication with Customer

10.3.1 Chat Communication with Customer

The Chat Communication is available for the following mediums.

- Ameyo Web Chat
- Facebook
- Twitter
- WhatsApp for Business Chat
- Line Messenger
- Viber Messenger

Click the above links to know more about the working of the different chat medium supported by Ameyo.

Missed Chats: Missed Chat is also supported in Ameyo.

10.3.2 WebChat Communication with Customer

Change = 1

The supervisor can communicate with customer through Ameyo WebChat, and the working and features are similar for Supervisor as that of the agent. However, the Group Manager does not have the privileges to communicate through chat mode with customer, as the group manager is not allowed to work in interaction and chat campaigns.

The Administrator has to add the media profiles for the required platform. After the integration into media profile, whenever the customer sends a message through any medium, a ticket will be created that will be aligned with the same customer. The agent can also reply to that chat and communicate with the customer.

Whenever a customer sends a message using any of the above-configured chat messaging services, a new ticket will be created in the system.

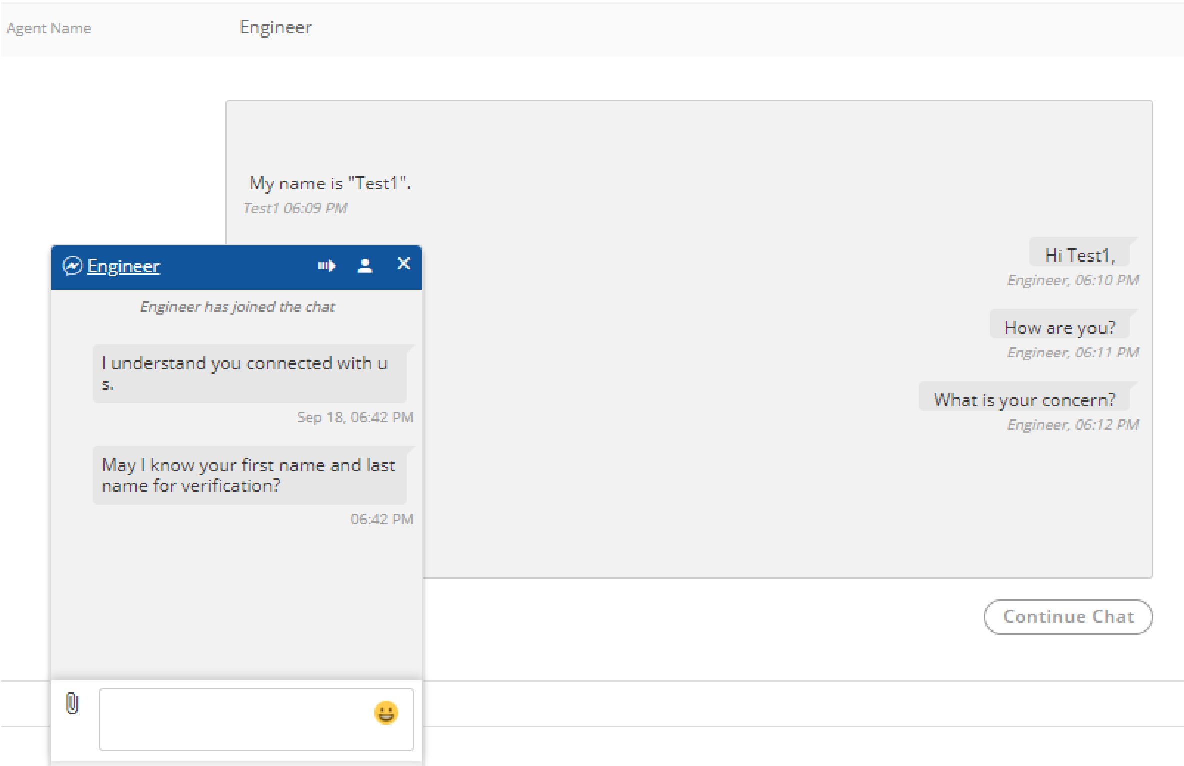


Figure: New Ticket through Chat

The agent just has to click on "Continue Chat" button to reply to the customer through the same chat service that is being used by the customer.

10.3.2.1 Displaying Name of Agent to the Customer

During the chat, the name of the agent will be displayed to the customer. If a chat is being transferred, then the name of the new agent will also be displayed.

10.3.2.2 Customer Name is Clickable

Name of the registered customer is clickable in the chat window. The agent can hover the mouse over the customer name being displayed in the header to view the external link icon and click it to view its details in a new tab.

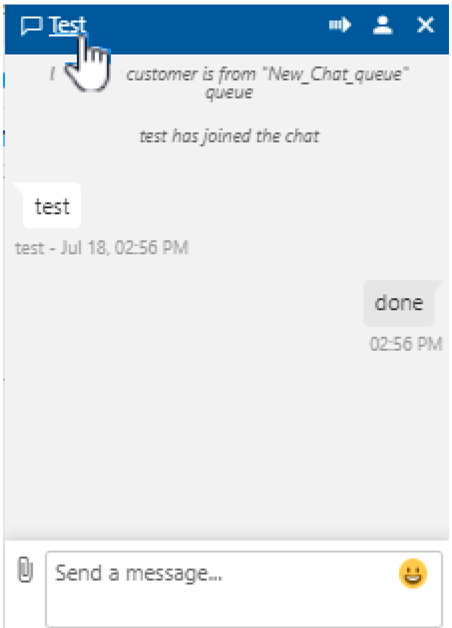


Figure: Customer Name is clickable

After clicking the name of the customer, the following page opens in which all the details of the customer show in the CRM bar.

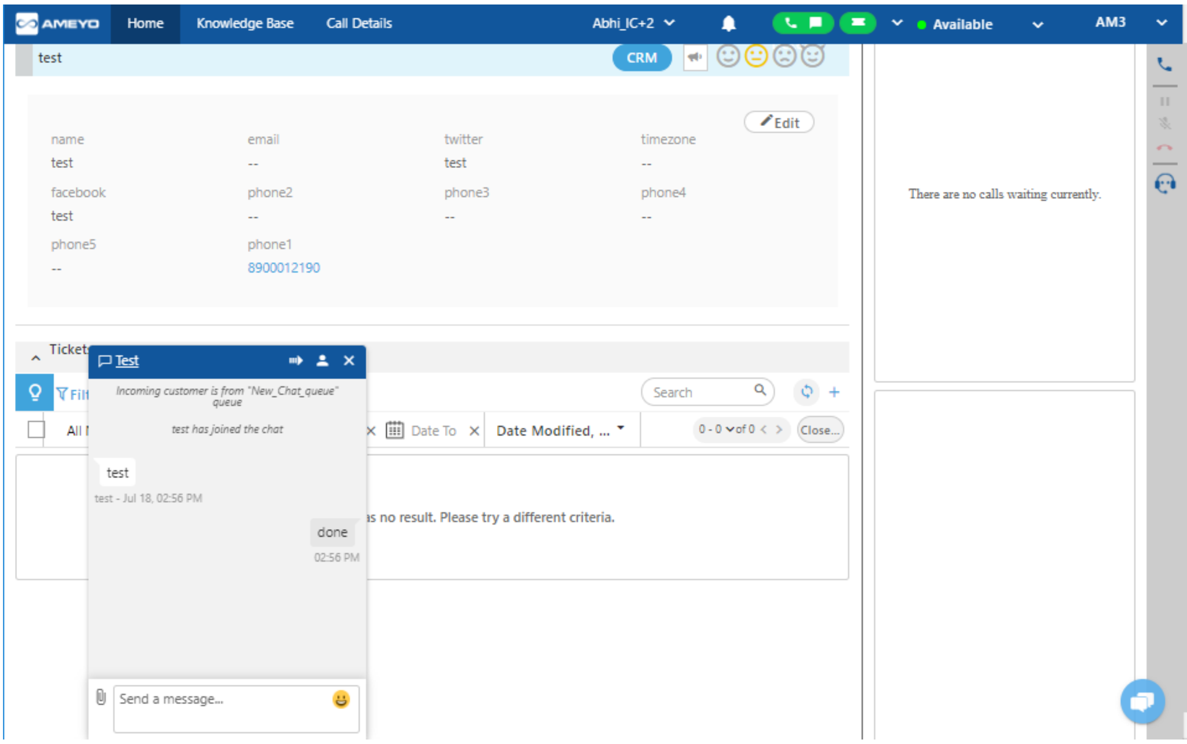


Figure: Customer Details

All the operations on Chat ticket are already explained in Ticket Operation page.Know more…

10.3.2.3 Identifying and Linking Customers during Chat

In the chat window, the customer can now be searched and linked directly. It would be the best way to identify the customers, especially those who are coming through a third-party integration like Smooch.
The agent can click account icon, located on the top right corner of the chat window. The available customer names are displayed on the bottom.

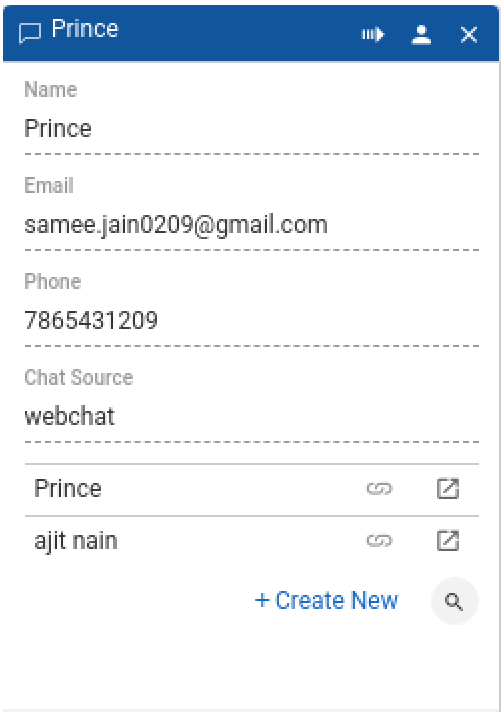


Figure: Options to link the customer in chat

The agent can click "link" icon with the customer to link the chat to that customer.

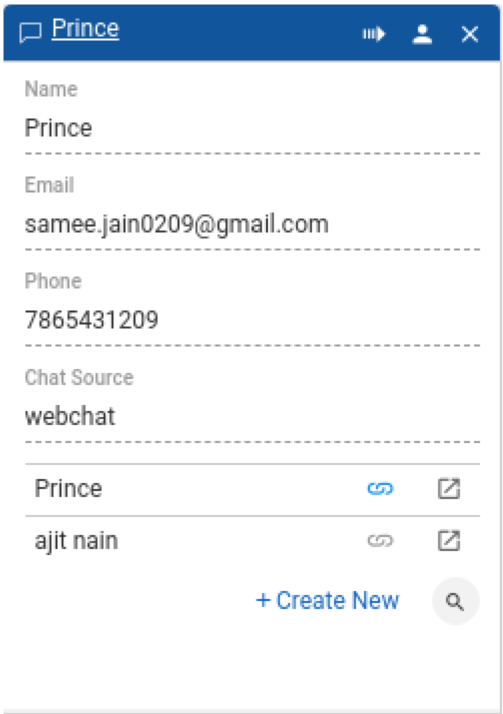


Figure: Linked a Customer with the chat

The Agent can change the associated customer while on chat itself. Changing the customer associations on the chat can be done multiple times. However, the final customer would be one who have been selected by the agent at the time of disposing the chat after the chat disconnection.

If there are multiple customers found, then the agent has to select anyone of them through the drop-down menu. The notification is displayed on the screen whenever the customer information is updated.

10.3.2.4 Chat Transcript

There are several times when the customer wants the transcript of the chat, which he has initiated with the ameyo agent. In such cases, the customer has to click icon (present on the chat modal) to send the transcript of the chat to the email-id, which was registered by the customer while initiating the chat.

If the customer does not register the email-id, then the chat-transcript icon will not be visible on the chat modal.

Following screenshot shows the chat conversation of the agent and customer chat log.

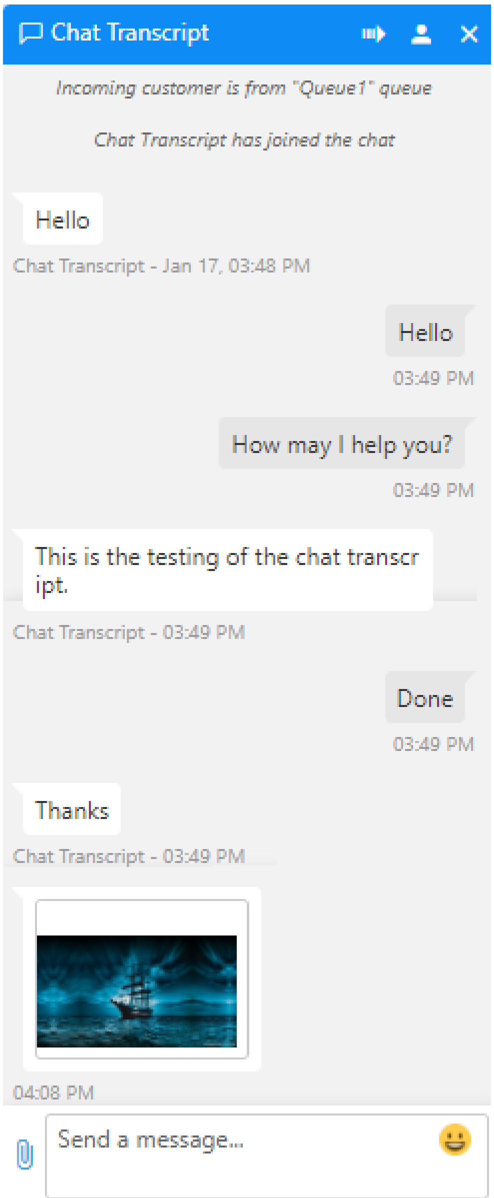


Figure: Agent Chat Conversation

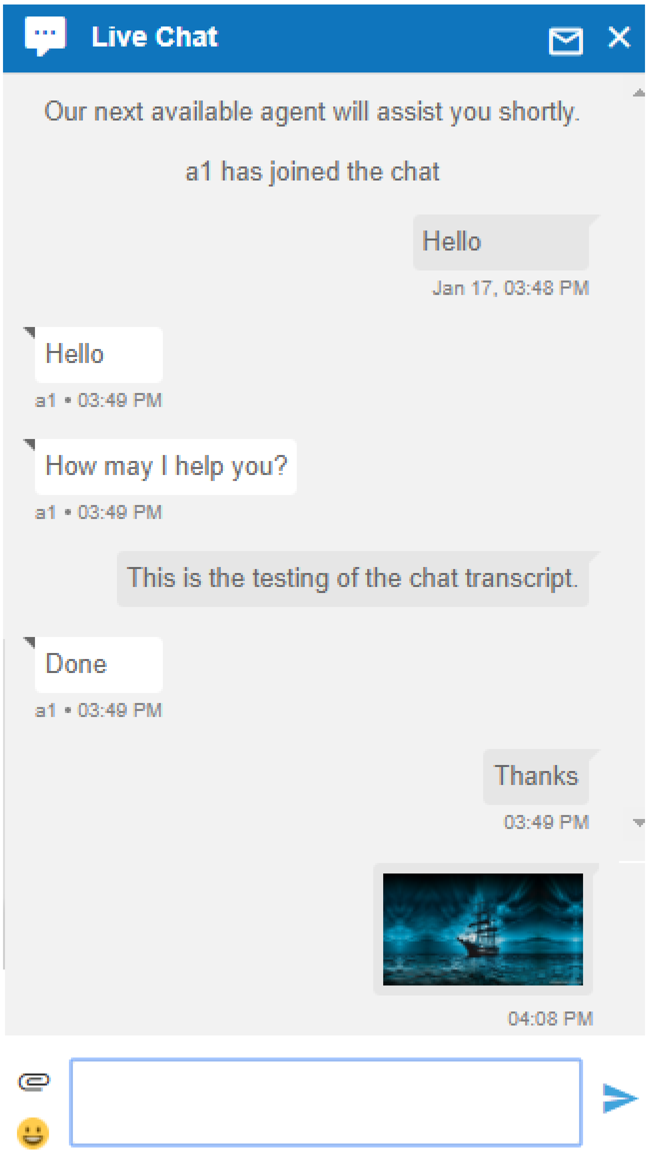


Figure: Customer Chat Conversation

The chat transcript, which is sent to the customer's registered email-id, contains both "text" and "images" used while having a chat. Following screenshot shows the chat-transcript send on the customer's registered email-id.

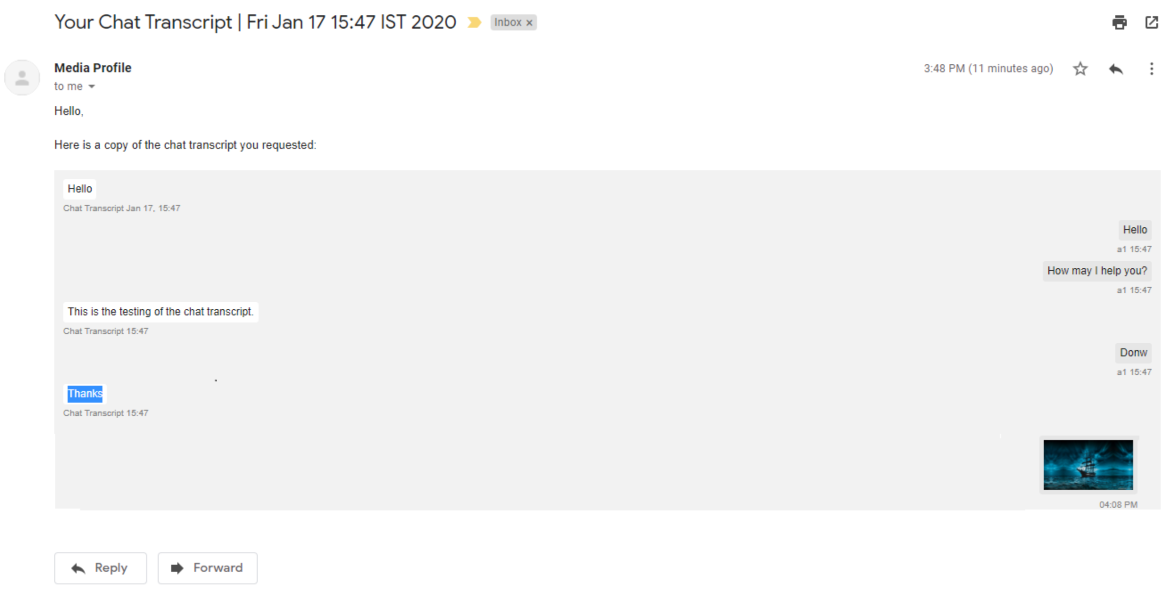


Figure: Chat Transcript sent over Email

If the customer does not click the chat-transcript icon, then the transcript will not be sent over the email-id.
The chat-transcript will only be sent, only after the agent dispose-of the chat.

10.3.2.5 Load Previous Chats

If the received chat at the Agent side is from the returning customer, then an option named as "Load Previous Chats" is shown in the WebChat modal. The agent can click this option to view the previous chats for that customer. After clicking the option the agent can scroll up the scroll bar to view the previous chats of the customer.

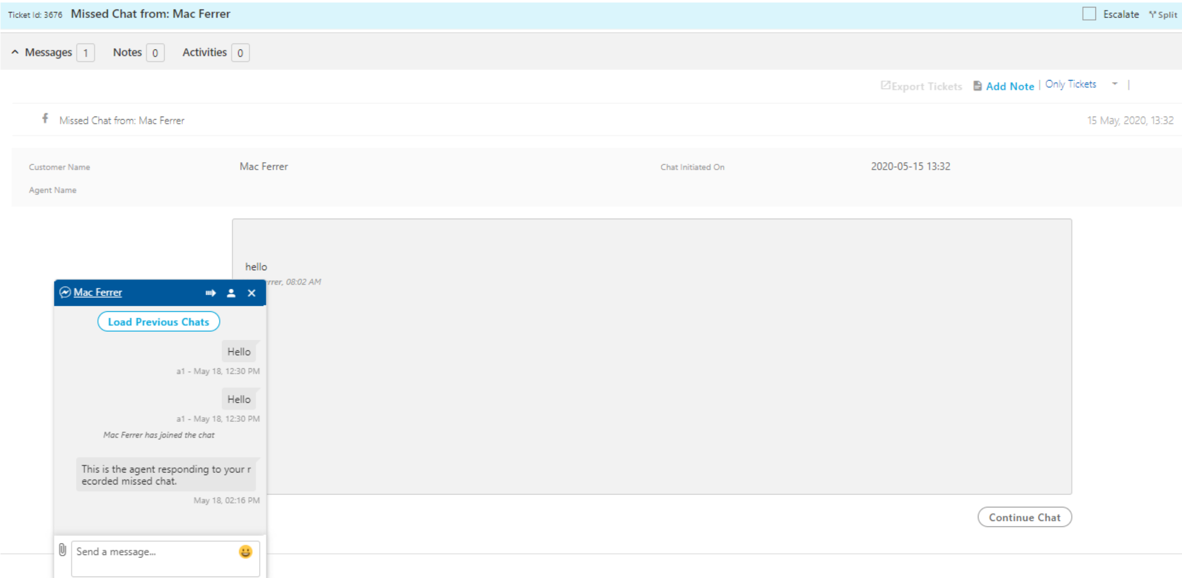


Figure: Continue Chat with Customer

10.3.2.6 Disposing the chat

After having the chat with the customer, the agent has to dispose off the chat. Click **"X"** icon on the chat box. The following screen comes up to dispose the chat.

Agent may receive any of the following disposition screens based upon the configurations.

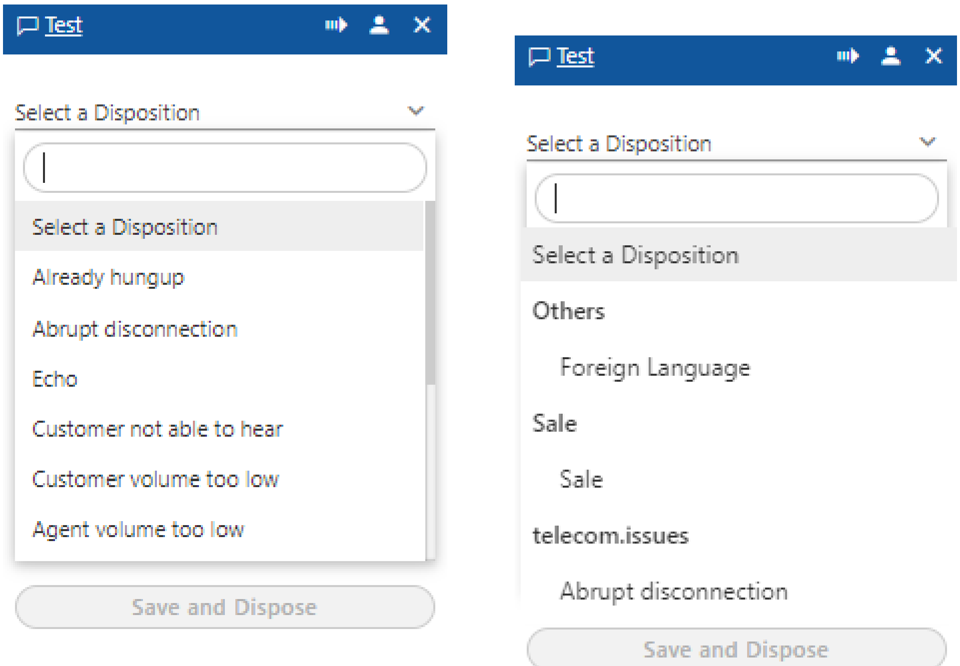


Figure: Chat Dispose

Figure: Two-level Disposition Selection

By default Two-level Disposition is present. If the administrator has configured the Single level Disposition, then the agent will receive the first modal for disposing the chat off.

If the Administrator have configured "ACW Connected (in sec)" for Chat, then the idle chat session after this specific timeout value (given in seconds) will be disconnected and disposed of. To avoid such scenario, and in general, we recommend to dispose of the idle chat session within this ACW timeout duration.

10.3.2.7 Resizable Text-field of Chat Modal

The text field in the Ameyo Web Chat modal has been improved. It will have a constant height always, within which it will be auto-resizable. The default size of the text field will be there for up to two lines; however, it will be resized up to four lines. After four lines, a vertical scroll bar is displayed. Refer to the following screenshot of the chat modal at the customer's side.

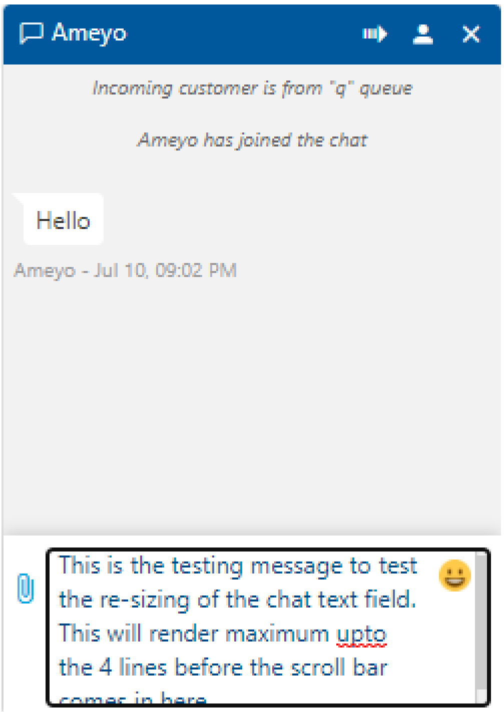


Figure: Improved text field in Ameyo Web Chat Modal at the customer's side

This behavior remains the same for the Ameyo Web Chat modal at the agent's side also.

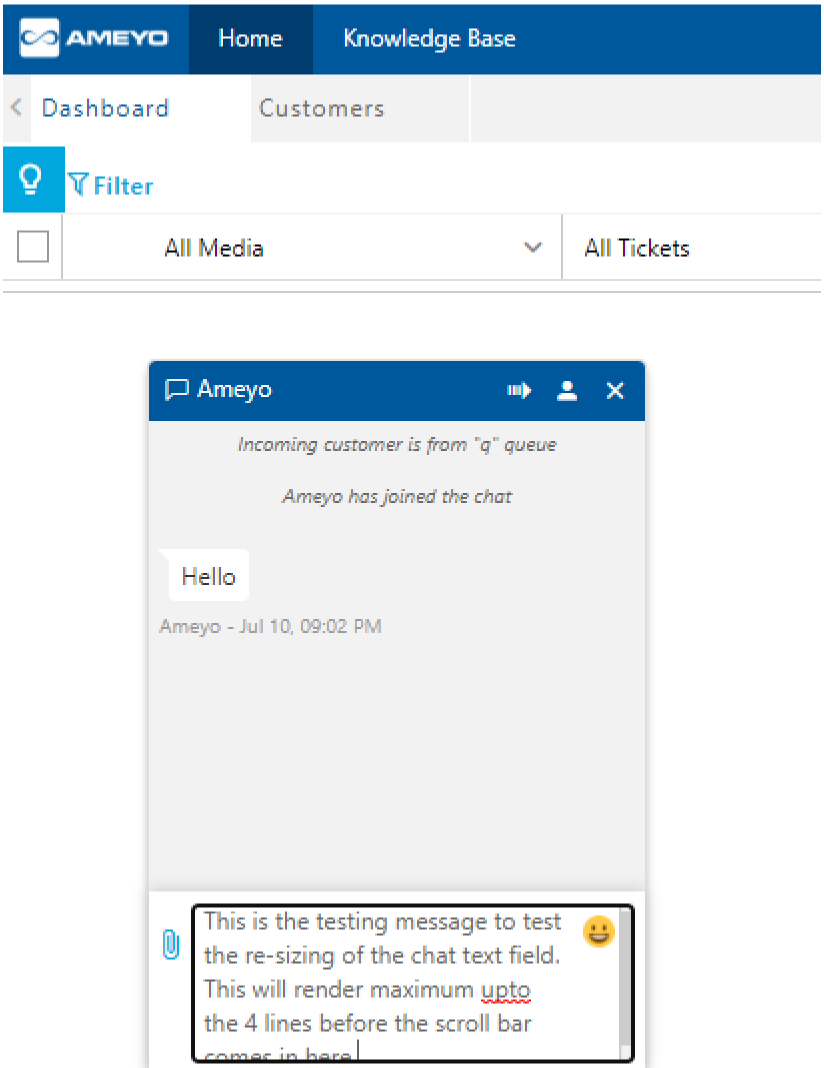


Figure: Improved text field in Ameyo Web Chat Modal at the agent's side

The following are other features of the Ameyo Web Chat Modal.

- Use the backspace key to erase the characters on the left side.
- Use "CTRL + Enter" key to enter into a new line in the text field. The new line inserted by the sender (customer or agent) will be visible as it is to the receiver (agent or customer).

  When the agent copies the content from any source (such as a Website) that contains new lines and pastes in the Chat Modal, then the inclusion of newlines depends upon the source text format. All the browsers and even Websites follow different formats. As most of the editors follow UTF-8 formatting, it is possible to control the behavior over there.

- Use "Enter" key to send the message. After sending the message, the text field will regain its original size of two lines.

10.3.3 Facebook Communication with Customer

The supervisor can communicate with customer using Facebook chat, and the working and features are similar for Supervisor as that of the agent. However, the Group Manager does not have the privileges to communicate with Facebook chat with customer, as the group manager is not allowed to work in interaction and chat campaigns.

Facebook is a third-party socializing application, which provides to communicate with different people. With Ameyo the customer can reach to the agent and tries to resolve its queries with the help of Facebook. There are two methods through which the customer can reach to Ameyo, Facebook Post and Facebook Messenger. Whenever the customer post any query on Facebook page or the customer directly sends a message to the organization through Facebook Messenger, a new ticket is created. All the operations can be performed on the Facebook ticket which can be performed on the normal ticket.

10.3.3.1 Receiving Ticket

Whenever a customer post any query on Facebook page of the organization or the customer directly sends a message through Facebook Messenger, a new ticket corresponding to the campaign and the queue will create. The agent can view the Facebook tickets on the dashboard and can reply on them as well.

Following two types of Facebook tickets can be received from the customer.

- Facebook Post
- Chat through Facebook Messenger

10.3.3.1.1.1 Identification of Facebook Tickets.

There are two following cases of Facebook tickets from which the ticket can be created.

- When the post is being raised by the customer on the page of organization's Facebook account, then the icon is displayed in front of the ticket. The icon shows that the ticket is raised through the Facebook post.
- When the customer started the chat through FB Messenger, then the icon is displayed in front of the ticket. The icon shows that the ticket is raised through the Facebook Messenger.

10.3.3.2 Reply on Facebook Post Ticket

Click on the Facebook ticket received from the customer. Following page opens up.

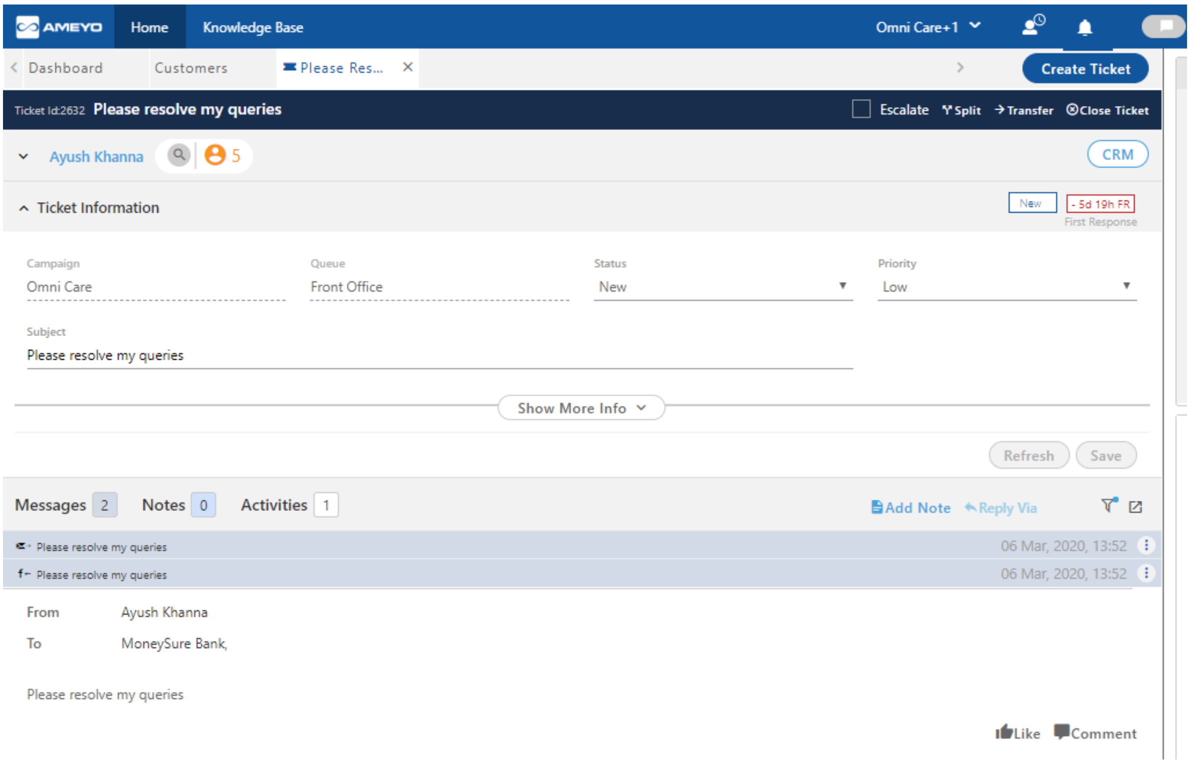


Figure: Customer's Facebook Ticket

Following operations can be performed on the received Facebook ticket.

1. **Basic operations:** There are four basic operations which agent can perform on the tickets received from the customer.
   A. **Escalate:** Enable the "Escalate" checkbox to escalate the ticket to the higher authority like the supervisor.

B. **Split:** It allows the agent to divide the ticket into two parts. The split feature can be used when there a single ticket contains multiple issues to be resolved by different teams or agents.

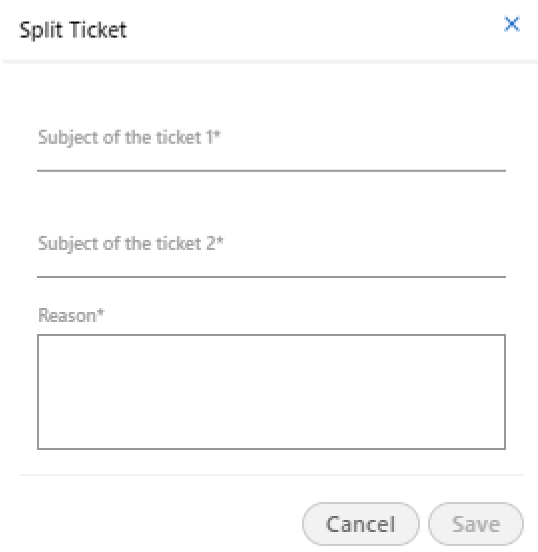


Figure: Split Ticket pop-up

Perform the following steps to split any ticket.

- Click  icon to split the ticket. A pop-up comes up.
- Provide the subject for "Ticket 1".
- Provide the subject for "Ticket 2".
- Provide the reason for the splitting of Ticket.

C. **Transfer:** The transfer option lets the agent to transfer the ticket to another queue depends upon the requirement raised by the customer.

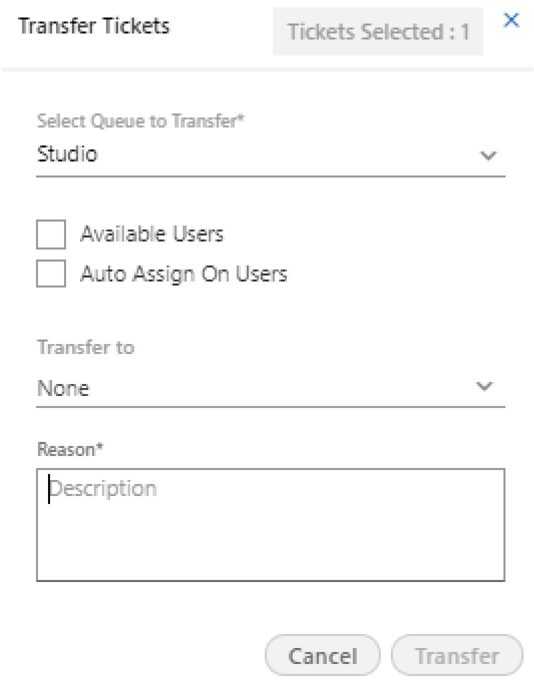


Figure: Transfer Ticket pop-up

Perform the following steps to transfer any ticket.

- Click  icon to split the ticket. A pop-up comes up.
- Select the Queue name from the drop-down list of Queues.
- Enable the "Available Users" checkbox to assign the ticket to any agent who is available at that moment.
- Enable the "Auto-assign On Users" checkbox to assign the ticket to any agent automatically by Ameyo.
- Provide the agent's name, if you want to assign the ticket to any particular agent in the queue specified above.
- Provide the reason for the transferring the Ticket.
- Click "Transfer" button to transfer the ticket.

D. **Close Ticket:** Click "Close" ticket button to close the ticket. After clicking on the close ticket option, a pop-up comes up.

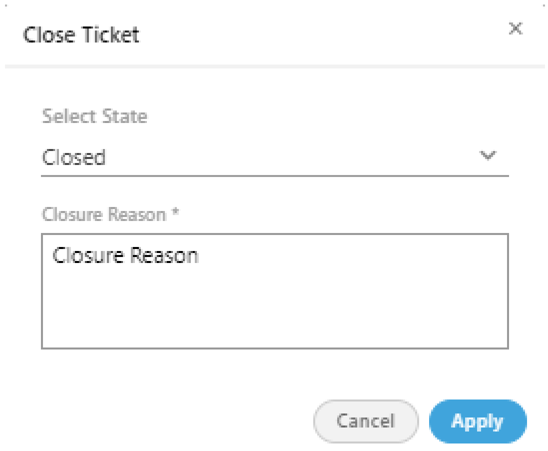


Figure: Closing Ticket

- Select the status of the ticket from the drop-down menu of the state. Agent can select one of the states which are created under the closed state by the administrator.
- Provide the "Closure Reason" for which you are trying to close the ticket.
- Click "Apply" button.

2. **Customer Information:** The first section of the page contains the information of the customer. Agent can view or modify the information. Know more...
3. **View Customer Cards:** If more than one customer is created with the same information, then number of such customers with same information will be displayed with icon. You can click this to view the customer cards.

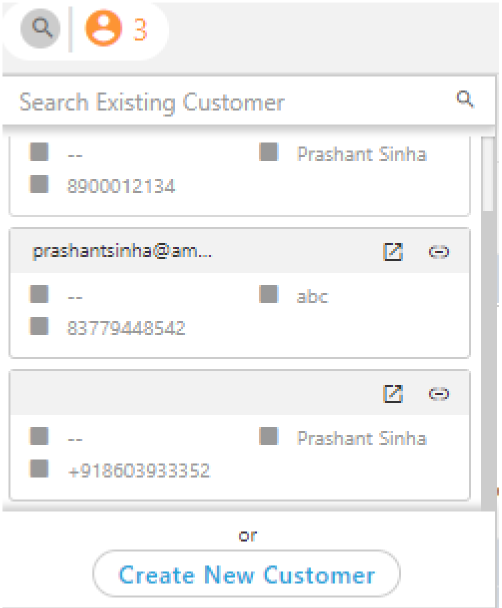


Figure: Customer Cards

Here, the agent can click to view the Customer Information in a new tab. You can also click icon to link this customer with other customer having same information.

If the customer is new and needs to create a new customer with the provided information, then click "Create New Customer" icon. After clicking the icon all the details will be automatically filled into the customer information tab. Fill all the information and click "Create" button to create new customer.

4. **Ticket Information:** It contains the information of the ticket which involves the following fields.

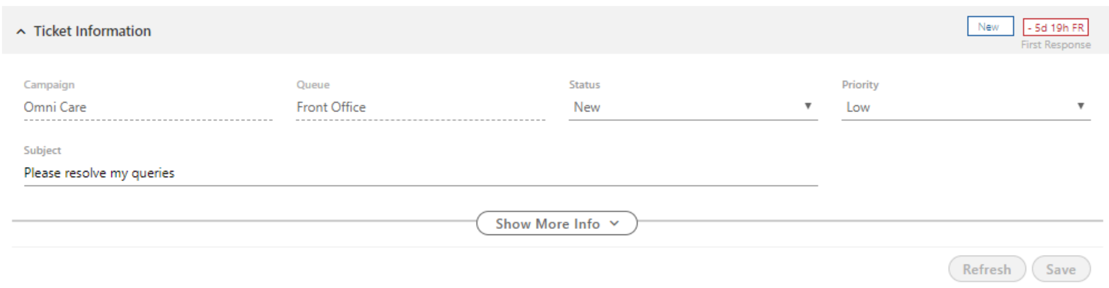


Figure: Ticket Information

A. **First Response:** It shows the first response on the ticket. First response is the time is the time when the first response has been delivered to the customer. It shows on the right side of the ticket information bar.

B. **Campaign:** It contains the name of the campaign in which the ticket has been arrived.

C. **Queue:** It shows the queue name in which the ticket has been arrived.

D. **Status:** It shows the status of the ticket. You can change the ticket status from here. Select the status which you want to set.

E. **Priority:** It shows the priority of the ticket. Agent can change the priority of the ticket from here as well. Select the priority of the ticket from the drop-down menu.

F. **Subject:** It contains the subject of the ticket.

G. **Show More Info:** Click "Show More Info" button to view more information of the ticket. It contains the custom fields created by administrator. If there are no custom fields then there will not be any fields.

You can hide this custom information of the customer. Click "Show Less Information" button to hide this section of the information.

5. **Messages:** It contains the complete list of activities that are done on the ticket raised.

Figure: Message Activities on Facebook Ticket

Agent can perform the following operation on the message section.

A. **Read Message:** Agent can simply read the messages sent through the facebook post.

B. **Message count:** The message count  represents the total number of the activities done on the ticket raised by the customer.

C. **Notes:** The notes count  shows the total number of the notes which has been given on ticket of the customer.

D. **Activities:** The activities count  shows the total number of the activities performed on the ticket.

E. **Export Tickets:** Export tickets option provides the feature to save all the tickets in CSV format to agent's system. Perform the following steps to export tickets.

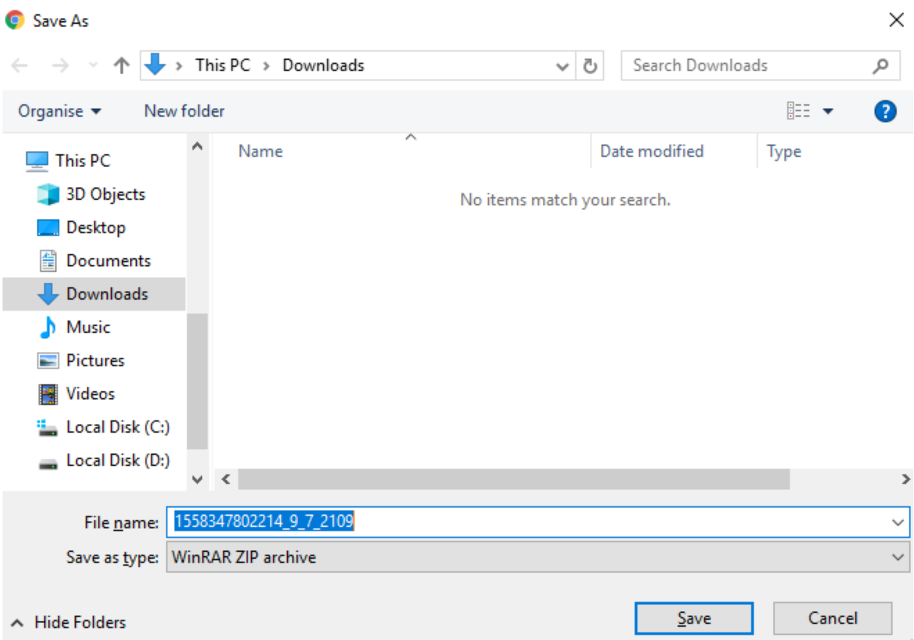
- Click  icon to export all the tickets of the customer.
- A pop-up opens up, which allows agent to download folder on specific location.
- 

Figure: Export all Tickets

- On the opened pop-up, provide the name of the file, if you want to change, it contains the default name of the file contains the date and time of the Facebook ticket arrived at the system.
- Click "Save" button.

F. **Add Note**: Click Add Note icon to provide the note on the ticket. After clicking on the icon, following wizard opens up.

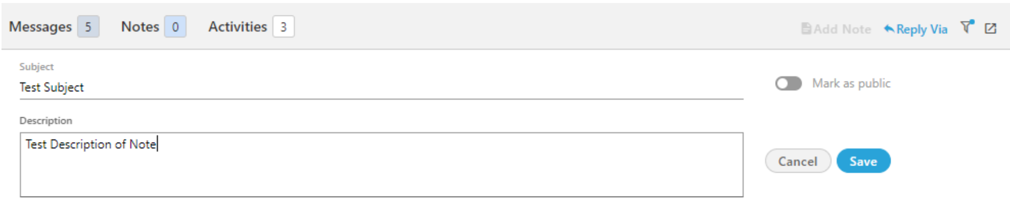


Figure: Enter Note

There are two type of notes which can be given.

- **Public Note:** When the agent wants to show the note to all the viewers of tickets, whether the users or the customer, then pubic note can be provided. The public note is visible to all the agents, supervisors assigned in that campaign and also to the customer.

  However, currently there is no mechanism for customer to see the public note.

  Toggle the Mark as public switch to provide the public note. After toggling the switch enter the subject and description of the note and click "save" button.

- **Private Note:** When the agent wants to provide the note only for the personal use, then a private note can be applied. The private note is visible to all the agents and supervisors who are assigned in that campaign.

  By default, a note is marked as private, until the status of the toggle button is not changed. For private note, enter the subject and description of the note and click "save" button.

G. **Filters:** If there are more than one message send by the customer, then agent can filter the messages according to the need.

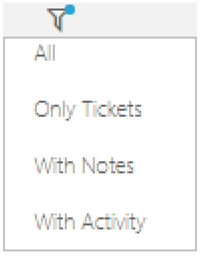


Figure: Filter the Messages

Following filters are available. By default, "Only Tickets" filter will remain selected that will show only ticket messages and no notes will be displayed.

- **All:** It shows all the tickets and notes send by the customer.
- **(Default) Only Tickets:** It filter those messages which are considered as tickets.
- **With Notes:** It shows all the tickets with all notes provided. If the note is provided on any ticket, then agent has to apply this filter to view the note on the ticket. After the
- **With Activity:** It filter those messages on which some activity has been performed.
- You have to select "All" or "With Notes" filter to show the notes.

H. **Access a Note:** Select "All" or "With Note" filter to access the notes. All the tickets and notes are visible as the collapsible sections.

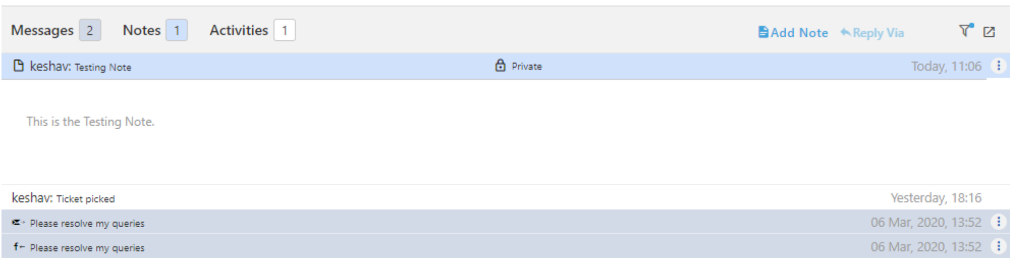


Figure: Ticket with the Note

Click the note to access it. On the collapsible bar, Public label is displayed for a public note, whereas Private is displayed for a private note.

I. **Update and Delete a Note**: Click ⋮ icon to update or delete the note.

All the agents and supervisor assigned in the same Interaction Campaign, can update and delete both public and private notes on the assigned ticket.

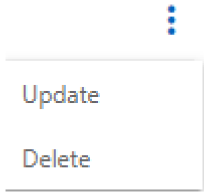


Figure: Options to Update or Delete the Note

It shows the following two options.

- **Update:** Click "Update" button to edit the note inline.

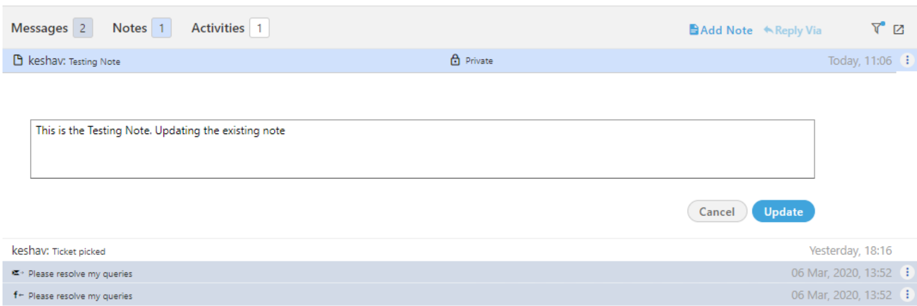


Figure: Update Note

"Update" button only be visible once the agent changes the note. Click "Update" button to save the changes.

- **Delete:** Click it to delete the note. A confirmation pop-up is displayed.

If the note is deleted, then it cannot be retrieved in any manner. It will be deleted permanently.

The following screenshot shows the confirmation message before deleting a public note.

Figure: Confirmation pop-up

The following screenshot shows the confirmation message before deleting a private note.

Figure: Confirmation pop-up

Click "Delete" button to delete the note permanently, else click "Cancel" button.

J. **Reply:** Click ⋮ icon to reply to the customer on the ticket. The actions on this icon depends upon the media profile type. Click "Comment" to comment the reply to the customer's Facebook post.

Figure: Reply on Facebook Post Ticket

Provide all the necessary details used while providing the comment on the customer's Facebook post. The agent can click "Like" option to like the post raised by the customer.

Character Limit Restriction: The character limit for the reply on Facebook post is 8000. That means, the agent can send the reply to the customer that contains maximum of 8000 characters.

K. **Send Options:** Agent is now able to send and change the state of the ticket simultaneously, by just clicking on "Send" button and selecting the state of the ticket.

Click icon present adjacent to send button. It shows the complete list of state which has been configured by the administrator.

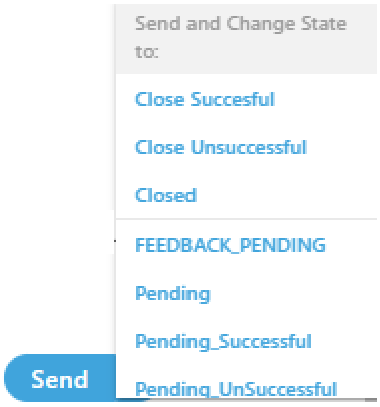


Figure: Send and change State of Ticket

Select the state and click send button. It changes the state and send the reply to customer simultaneously.

Click "Send & Close" button to send the reply and close the ticket simultaneously.

10.3.3.3 Reply on Facebook Messenger Ticket

Click on the Facebook ticket received through FB Messenger from the customer. Following page opens up.

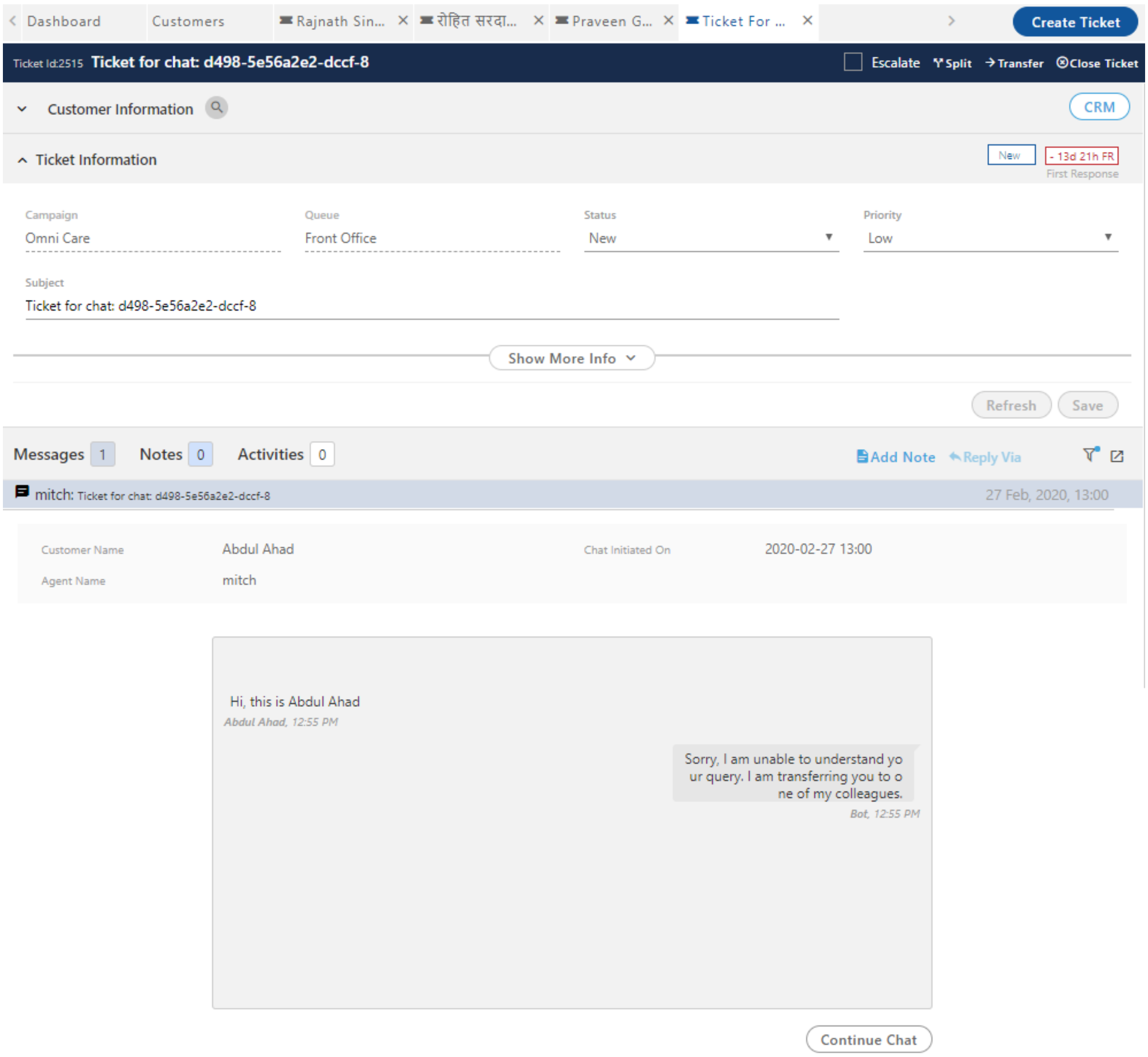


Figure: Customer's Facebook Ticket

All the operations which the agent can perform on Facebook post ticket can be performed on the ticket raised through FB Messenger. Know more...

Reply: Click Continue Chat button to reply to the customer on the ticket. After clicking this button the chat with the customer starts and hence, the agent is able to continue chat to the customer.

After clicking "Continue Chat" button the following chat window is displayed.

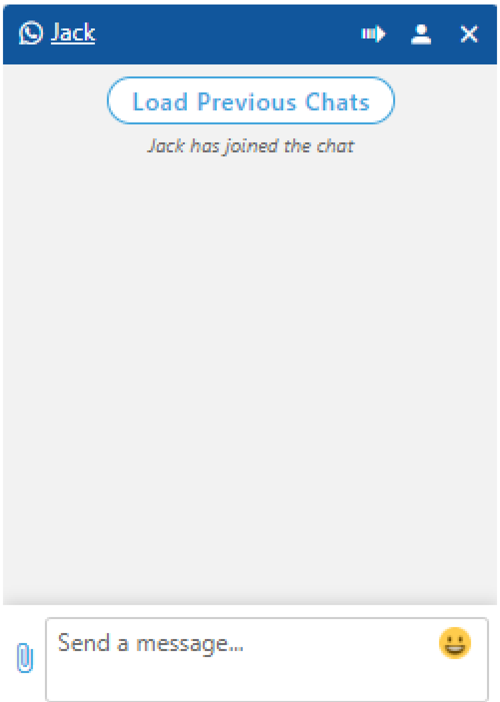


Figure: Continue Chat Window

The agent can perform the following operations here.

- The agent can reply to the customer.
- The agent can send media files such as audio, video, pdf, docx, images and so on.
- The agent can view previous chats, by clicking "Load Previous Chats" button present at the chat window. By default, the previous chat will not be loaded. The agent has to click this button to view previous chats.

Except reply option, all other options are same that are described above.

Nisha

10.3.3.3.1 Deletion of Posts/Comments/Replies in Facebook Account

There are scenarios where sometimes the customers delete their comments/replies/posts. But after the creation of the ticket, these deleted comments were not getting deleted from the ticket, and hence the agents could reply to such comment/replies. Thus, it was required to delete such comment/replies from the tickets also which has been deleted by the customer from Facebook account.

When a customer deletes the post/comment/replies/posts, the same will be deleted from the ticket as well. Now, the deleted WebHooks are also supported with Ameyo. In this, whenever the customer deletes the comment/replies/posts, then the same will be get deleted from Ameyo ticket. However, the deleted message activity will show the deleted history for that message. The user however can view and access the original message and attachments of that deleted content or reply to that deleted message.

If the customer edited the comment/replies then, it also shows the edited content of that message, then the history for that edited message shows the original comment.

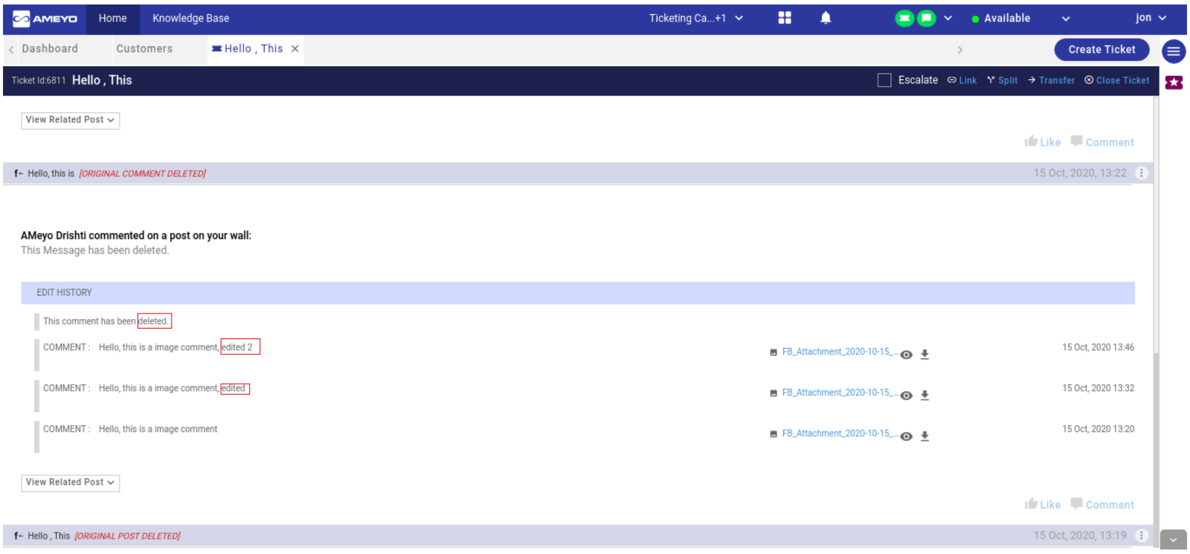


Figure: Agent's Comment/Reply on Page Recommendation Ticket

10.3.3.4 Attachment

Image can be added as attachment while adding a Comment or Reply for Facebook Posts. Ameyo Users can upload one image. The maximum file size limit for the image is 4 MB.

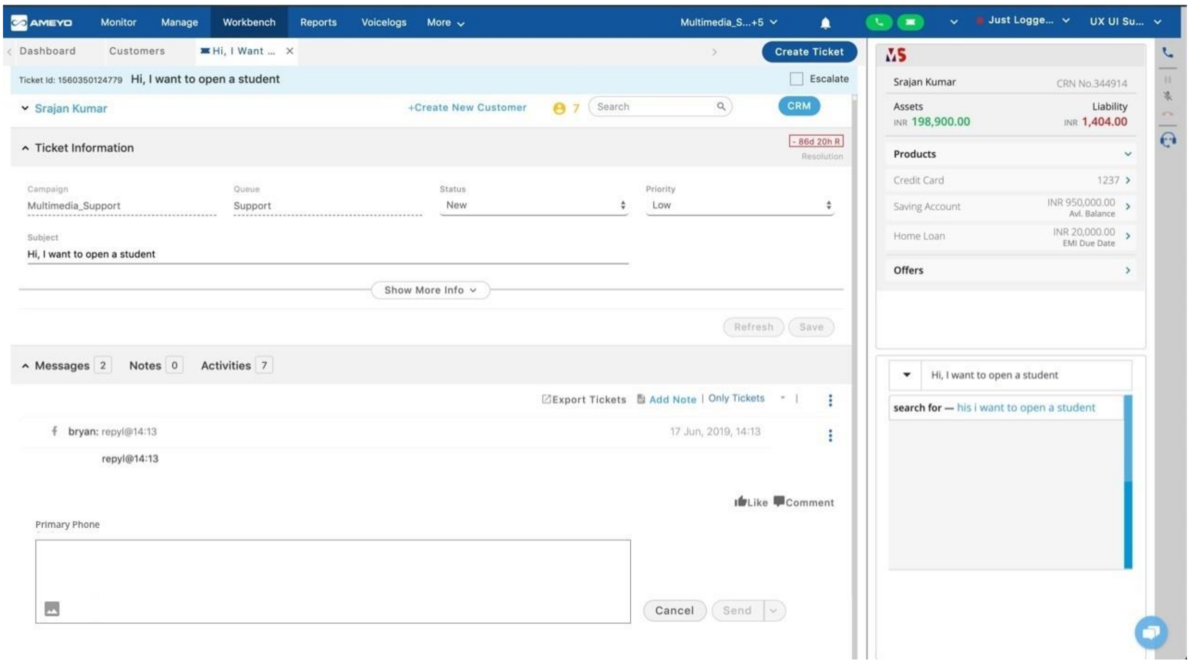


Figure: Attachment Option in Facebook Reply

Supported Image Types for Attachments in Facebook Comment and Reply: .img, .png, .jpg, .jpeg, .tiff, .tif, .bmp, .ico

Support for Video Attachments is not available in Ameyo AppServer for Facebook as of now.

Nisha

10.3.3.5 Send and Receive Message and Attachment as a Single Message

The users are capable of sending and receiving attachments and messages together. It means that, if the customer or user wants to send an attachment with the message, then these messages will count as a single message. It helps the user to provide information about the attachment within the message itself and hence, increases the customer experience.

It has been implemented for all channels those support attachments and messages to be sent as a single message. It is also present for AMF(Ameyo Messaging Framework) integration with Ameyo.

Facebook does not support sending messages and attachments within a single message. Thus, on Facebook, it will be treated as different messages. However, the agent from Ameyo can send these messages as a single message, but the customer will receive it as a different message.

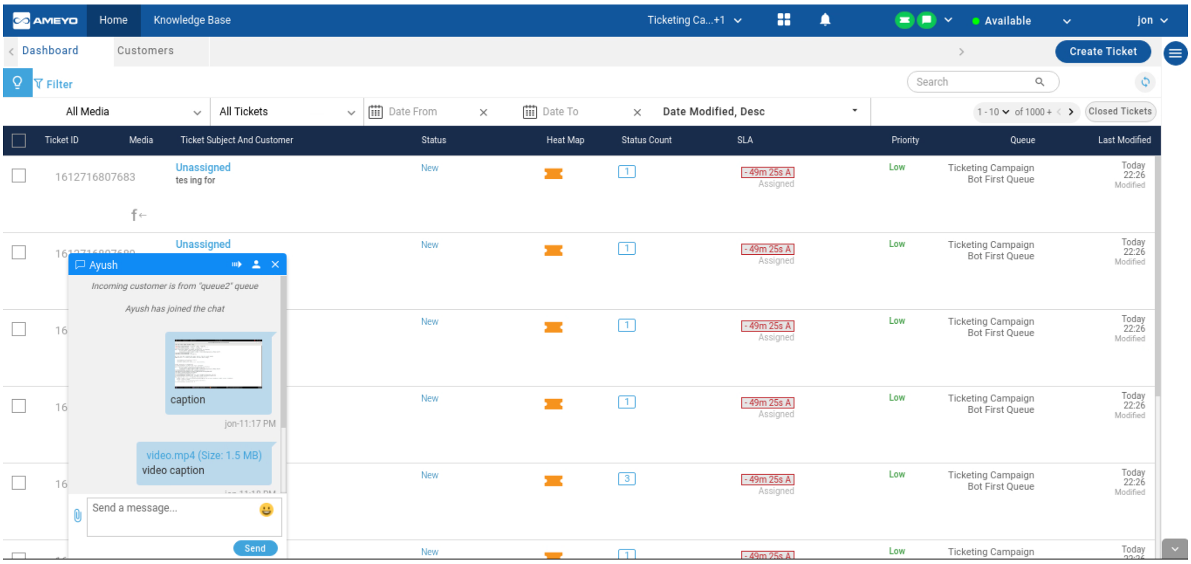


Figure: Sending Message and Attachment together as a single Message

Nisha

10.3.3.6 Creating Ticket on Recommending Facebook Page

When a customer recommends the Facebook page to another user, a ticket for the same will be created in Ameyo. On this ticket, the agent can reply, and hence the reach of the business can be increased. The following things will be used while creating a ticket for the page recommendation.

1. A ticket will be created and displayed to the agents and supervisor whenever the page is recommended.
2. Ticket subject will include the page name and the recommendation type (recommended or not).

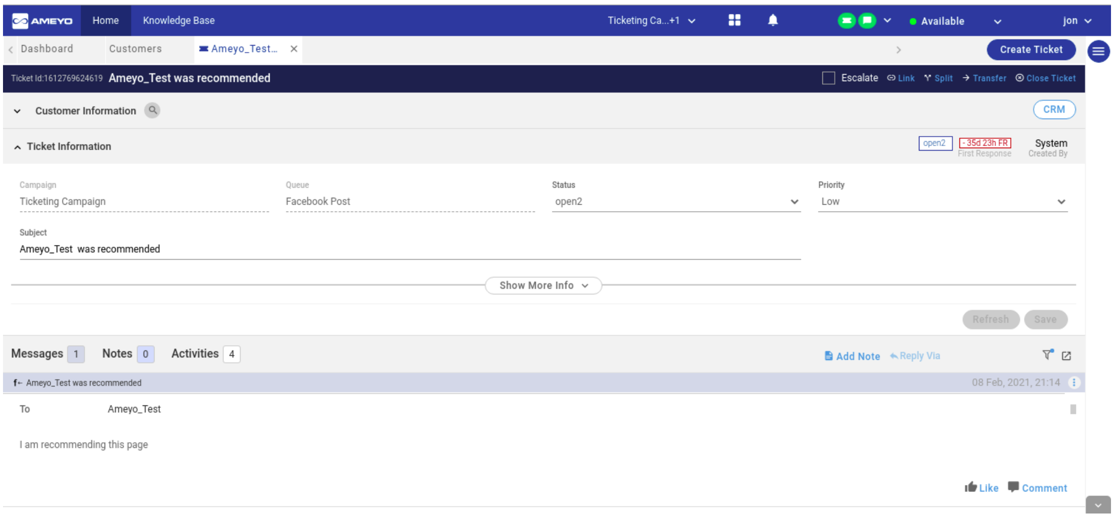


Figure: Facebook Page Recommendation Ticket

3. The content that has been provided by the customer while recommending the page will also be included in the ticket.
4. Agents and supervisors are able to comment and reply to that ticket of recommendation.

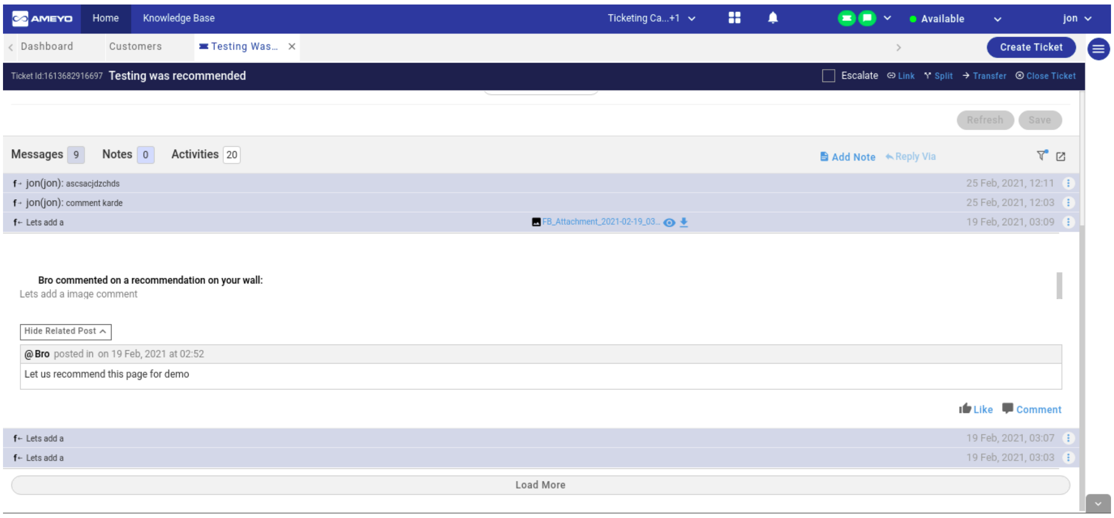


Figure: Agent's Comment/Reply on Page Recommendation Ticket

5. If the customer selects "Not Recommended" option to not recommend the page, then the same will also be visible to the agents.

6. The ticket will include the date and time of recommendation, comment/replies, From a user and To the user, and attached images/videos(if any).

10.3.3.7 Acronyms

The agents can now use the Acronyms while commenting on the customer's post. The agent can use the acronyms that are being created. Know more...

10.3.4 Twitter Communication with Customer

The supervisor can communicate with customer using Twitter, and the working and features are similar for Supervisor as that of the agent. However, the Group Manager does not have the privileges to communicate with Twitter with customer, as the group manager is not allowed to work in interaction and chat campaigns.

Twitter is a third-party socializing application, which provides to communicate with different people. With Ameyo the customer can reach to the agent and tries to resolve its queries with the help of Twitter. There are two methods through which the customer can reach to Ameyo, Twitter tweet and Twitter Direct Messages (DM). Whenever the customer tweets any query on Twitter page or the customer directly sends a message to the organization through Twitter DM, a new ticket is created. All the operations can be performed on the Twitter ticket that can be performed on any normal ticket.

10.3.4.1 Receiving Ticket

Whenever a customer tweets any query on Twitter page of the organization or the customer directly sends a message through Twitter DM, a new ticket corresponding to the campaign and the queue will create. The agent can view the Twitter tickets on the dashboard and can reply on them as well.

Following two types of Twitter tickets can be received from the customer.

- Twitter Tweets
- Chat through Twitter DM

10.3.4.2 Identification of Twitter Tickets.

There are two following cases of Twitter tickets from which the ticket can be created.

- When the tweet is being raised by the customer on the page of organization's Twitter account, then the icon is displayed in front of the ticket. The icon shows that the ticket is raised through the Twitter tweet.
- When the customer started the chat through Twitter DM, then the icon is displayed in front of the ticket. The icon shows that the ticket is raised through the Twitter DM.

10.3.4.3 Reply on Twitter Post Ticket

Click on the Twitter ticket received from the customer. Following page opens up.

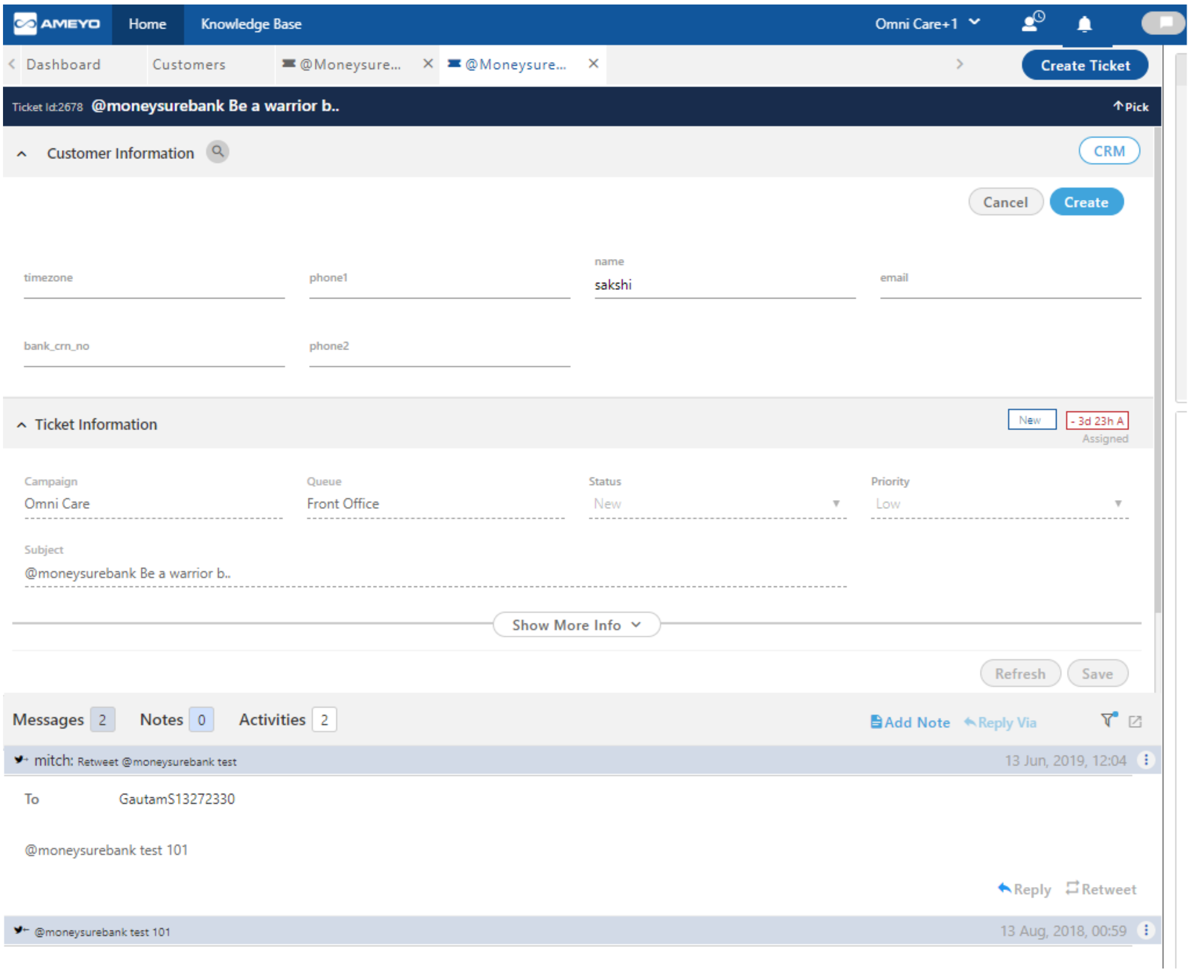


Figure: Customer's Twitter Ticket

Following operations can be performed on the received Twitter ticket.

1. **<u>Basic operations</u>:** There are four basic operations which agent can perform on the tickets received from the customer.

   A. **<u>Escalate</u>:** Enable the "Escalate" checkbox to escalate the ticket to the higher authority like the supervisor.

   B. **<u>Split</u>:** It allows the agent to divide the ticket into two parts. The split feature can be used when there a single ticket contains multiple issues to be resolved by different teams or agents.

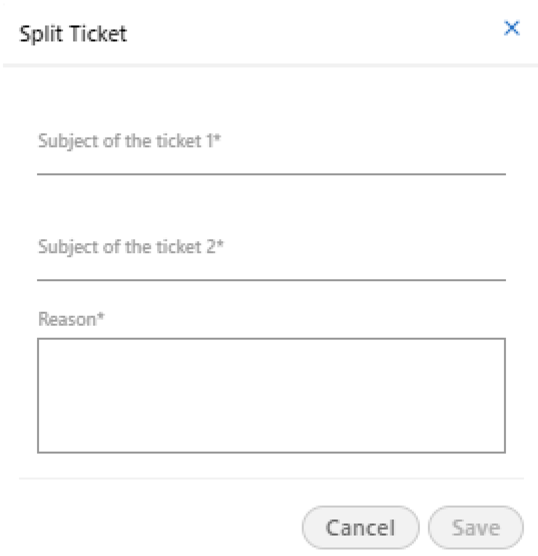


Figure: Split Ticket pop-up

Perform the following steps to split any ticket.

- Click 

 icon to split the ticket. A pop-up comes up.
- Provide the subject for "Ticket 1".
- Provide the subject for "Ticket 2".
- Provide the reason for the splitting of Ticket.

   C. **<u>Transfer</u>:** The transfer option lets the agent to transfer the ticket to another queue depends upon the requirement raised by the customer.

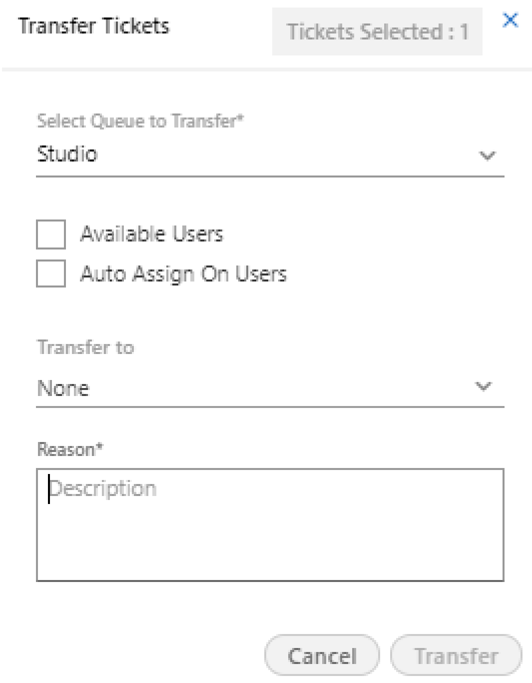


Figure: Transfer Ticket pop-up

Perform the following steps to transfer any ticket.

- Click → Transfer icon to split the ticket. A pop-up comes up.
- Select the Queue name from the drop-down list of Queues.
- Enable the "Available Users" checkbox to assign the ticket to any agent who is available at that moment.
- Enable the "Auto-assign On Users" checkbox to assign the ticket to any agent automatically by Ameyo.
- Provide the agent's name, if you want to assign the ticket to any particular agent in the queue specified above.
- Provide the reason for the transferring the Ticket.
- Click "Transfer" button to transfer the ticket.

D. **Close Ticket:** Click "Close" ticket button to close the ticket. After clicking on the close ticket option, a pop-up comes up.

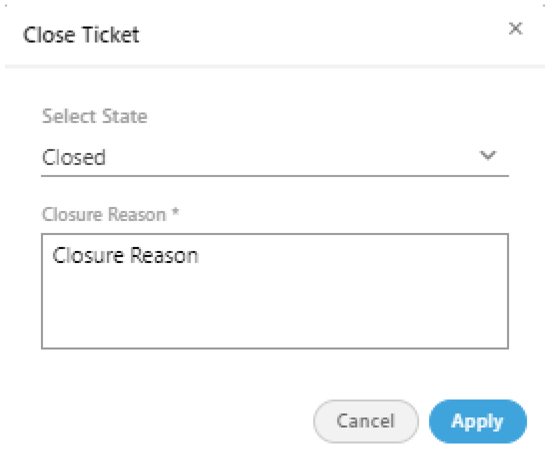


Figure: Closing Ticket

- Select the status of the ticket from the drop-down menu of the state. Agent can select one of the states which are created under the closed state by the administrator.
- Provide the "Closure Reason" for which you are trying to close the ticket.
- Click "Apply" button.

2. **Customer Information:** The first section of the page contains the information of the customer. Agent can view or modify the information. Know more...
3. **View Customer Cards:** If more than one customer is created with the same information, then number of such customers with same information will be displayed with icon. You can click this to view the customer cards.

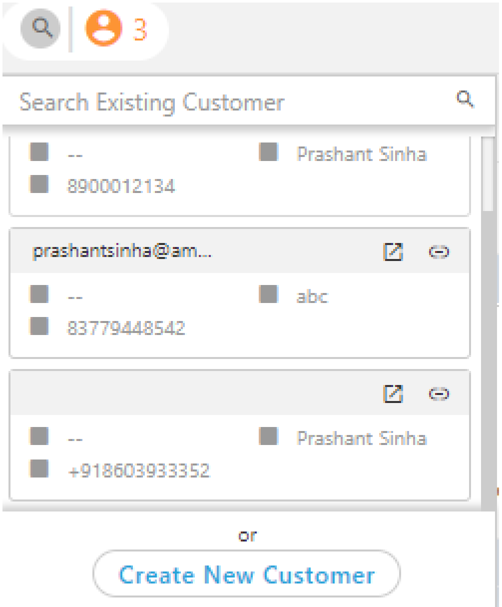


Figure: Customer Cards

Here, the agent can click to view the Customer Information in a new tab. You can also click icon to link this customer with other customer having same information.

If the customer is new and needs to create a new customer with the provided information, then click "Create New Customer" icon. After clicking the icon all the details will be automatically filled into the customer information tab. Fill all the information and click "Create" button to create new customer.

4. **Ticket Information:** It contains the information of the ticket which involves the following fields.

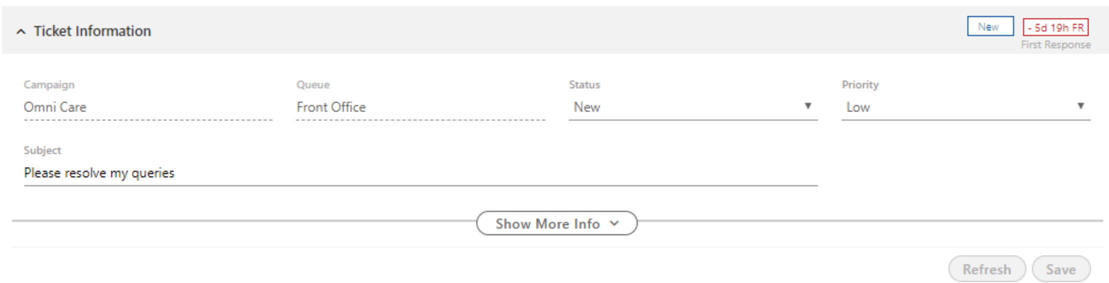


Figure: Ticket Information

A. **First Response:** It shows the first response on the ticket. First response is the time is the time when the first response has been delivered to the customer. It shows on the right side of the ticket information bar.

B. **Campaign:** It contains the name of the campaign in which the ticket has been arrived.

C. **Queue:** It shows the queue name in which the ticket has been arrived.

D. **Status:** It shows the status of the ticket. You can change the ticket status from here. Select the status which you want to set.

E. **Priority:** It shows the priority of the ticket. Agent can change the priority of the ticket from here as well. Select the priority of the ticket from the drop-down menu.

F. **Subject:** It contains the subject of the ticket.

G. **Show More Info:** Click "Show More Info" button to view more information of the ticket. It contains the custom fields created by administrator. If there are no custom fields then there will not be any fields.

You can hide this custom information of the customer. Click "Show Less Information" button to hide this section of the information.

5. **Messages:** It contains the complete list of activities that are done on the ticket raised.

Figure: Message Activities on Twitter Ticket

Agent can perform the following operation on the message section.

A. **Read Message:** Agent can simply read the messages sent through the Twitter post.

B. **Message count:** The message count Messages 1 represents the total number of the activities done on the ticket raised by the customer.

C. **Notes:** The notes count Notes 0 shows the total number of the notes which has been given on ticket of the customer.

D. **Activities:** The activities count Activities 0 shows the total number of the activities performed on the ticket.

E. **Export Tickets:** Export tickets option provides the feature to save all the tickets in CSV format to agent's system. Perform the following steps to export tickets.

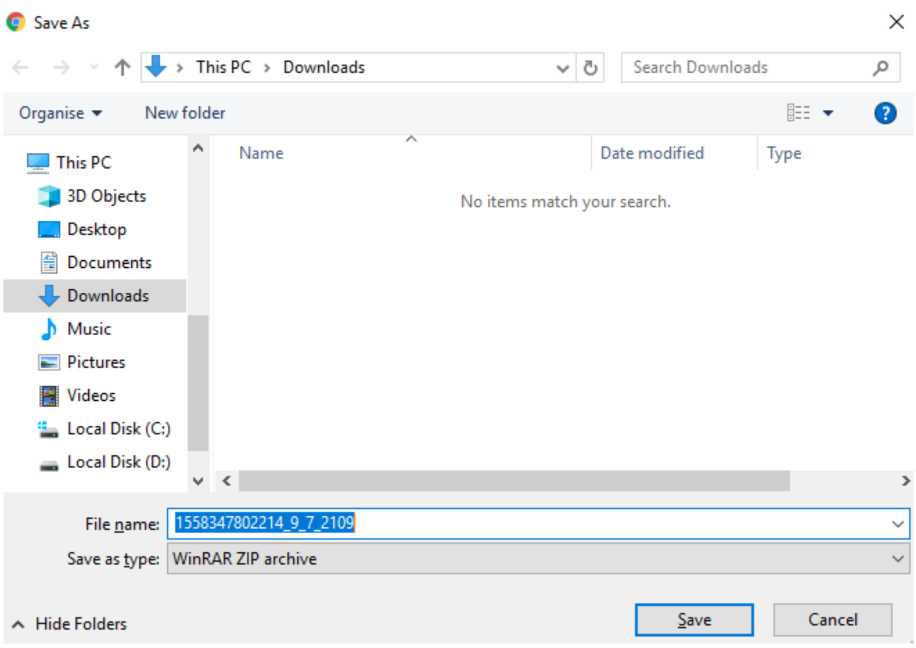
- Click  icon to export all the tickets of the customer.
- A pop-up opens up, which allows agent to download folder on specific location.
- 

Figure: Export all Tickets

- On the opened pop-up, provide the name of the file, if you want to change, it contains the default name of the file contains the date and time of the Twitter ticket arrived at the system.
- Click "Save" button.

F. **Add Note**: Click Add Note icon to provide the note on the ticket. After clicking on the icon, following wizard opens up.

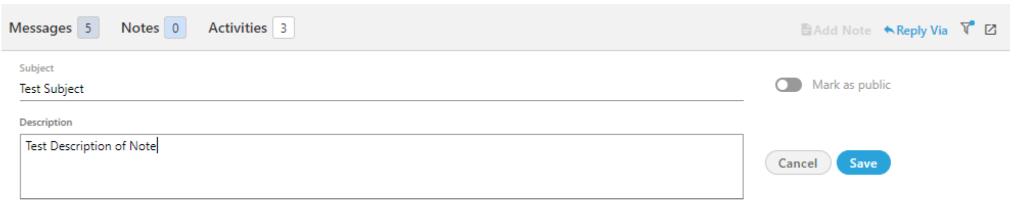


Figure: Enter Note

There are two type of notes which can be given.

- **Public Note:** When the agent wants to show the note to all the viewers of tickets, whether the users or the customer, then pubic note can be provided. The public note is visible to all the agents, supervisors assigned in that campaign and also to the customer.

  However, currently there is no mechanism for customer to see the public note.

  Toggle the Mark as public switch to provide the public note. After toggling the switch enter the subject and description of the note and click "save" button.

- **Private Note:** When the agent wants to provide the note only for the personal use, then a private note can be applied. The private note is visible to all the agents and supervisors who are assigned in that campaign.

  By default, a note is marked as private, until the status of the toggle button is not changed. For private note, enter the subject and description of the note and click "save" button.

G. **Filters:** If there are more than one message send by the customer, then agent can filter the messages according to the need.

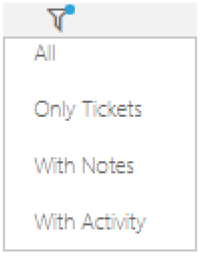


Figure: Filter the Messages

Following filters are available. By default, "Only Tickets" filter will remain selected that will show only ticket messages and no notes will be displayed.

- **All:** It shows all the tickets and notes send by the customer.
- **(Default) Only Tickets:** It filter those messages which are considered as tickets.
- **With Notes:** It shows all the tickets with all notes provided. If the note is provided on any ticket, then agent has to apply this filter to view the note on the ticket. After the
- **With Activity:** It filter those messages on which some activity has been performed.
- You have to select "All" or "With Notes" filter to show the notes.

H. **Access a Note:** Select "All" or "With Note" filter to access the notes. All the tickets and notes are visible as the collapsible sections.

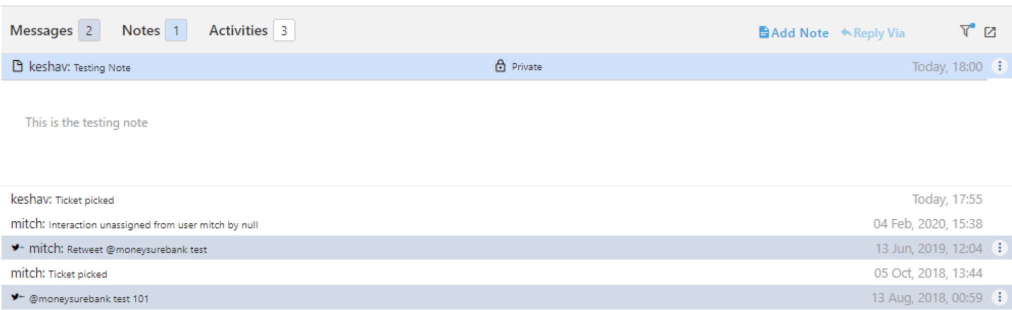


Figure: Ticket with the Note

Click the note to access it. On the collapsible bar, Public label is displayed for a public note, whereas Private is displayed for a private note.

I. **<u>Update and Delete a Note</u>:** Click icon to update or delete the note.

All the agents and supervisor assigned in the same Interaction Campaign, can update and delete both public and private notes on the assigned ticket.

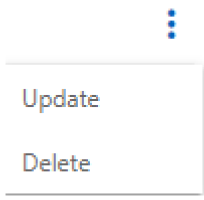


Figure: Options to Update or Delete the Note

It shows the following two options.

- **Update:** Click "Update" button to edit the note inline.

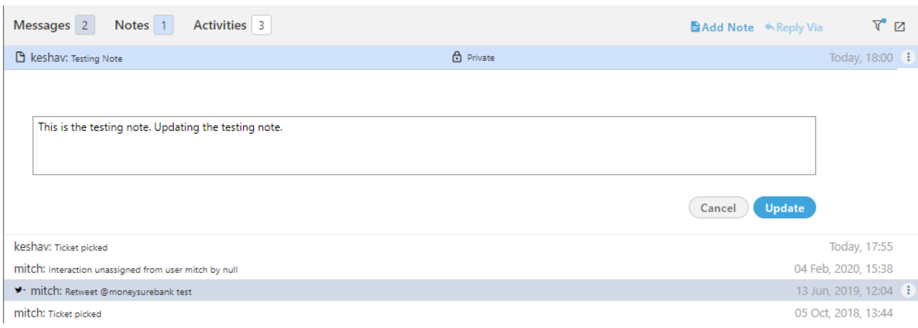


Figure: Update Note

"Update" button only be visible once the agent changes the note. Click "Update" button to save the changes.

- **Delete:** Click it to delete the note. A confirmation pop-up is displayed.

If the note is deleted, then it cannot be retrieved in any manner. It will be deleted permanently.

The following screenshot shows the confirmation message before deleting a public note.

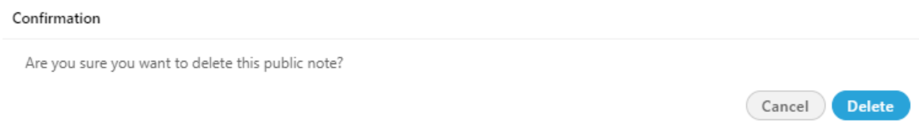


Figure: Confirmation pop-up

The following screenshot shows the confirmation message before deleting a private note.

Figure: Confirmation pop-up

Click "Delete" button to delete the note permanently, else click "Cancel" button.

J. **Reply:** Click ⋮ icon to reply to the customer on the ticket. The actions on this icon depends upon the media profile type. Click "Reply" to reply to the customer's Twitter tweet.

Figure: Reply on Twitter Tweet Ticket

Provide all the necessary details used while providing the reply on the customer's Twitter tweet.

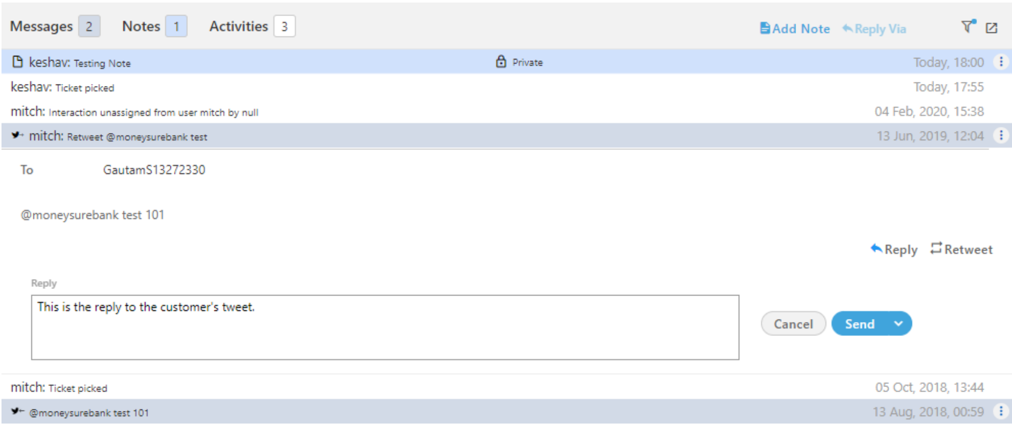


Figure: Reply on Twitter Tweet Ticket

The agent can click "Retweet" button to re-tweet the customer's tweet. It means that the tweet of the customer will retweeted on the organization's twitter page.

Character Limit Restriction: The character limit for the reply on Twitter tweet is 280. That means, the agent can send the reply to the customer that contains maximum of 280 characters.

K. **Send Options:** Agent is now able to send and change the state of the ticket simultaneously, by just clicking on "Send" button and selecting the state of the ticket.

Click ⌄ icon present adjacent to send button. It shows the complete list of state which has been configured by the administrator.

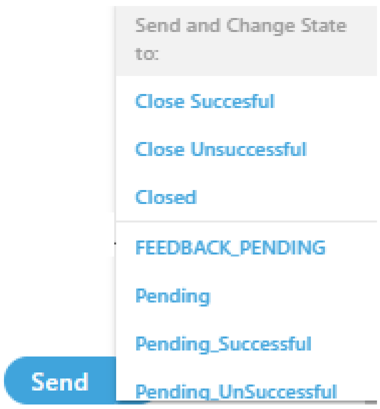


Figure: Send and change State of Ticket

Select the state and click send button. It changes the state and send the reply to customer simultaneously.

Click "Send & Close" button to send the reply and close the ticket simultaneously.

Nisha

10.3.4.3.1 Like/Unlike the Post/Comment

The agents can react with Like or Unlike on the posts or comments done by the customers. The agent can click "Like" button present in the ticket on the workbench to like the post (as shown with a red box in the screenshot). If the agent wants to unlike the post/comment, then the agent can click again "Like" button, unlike the post.

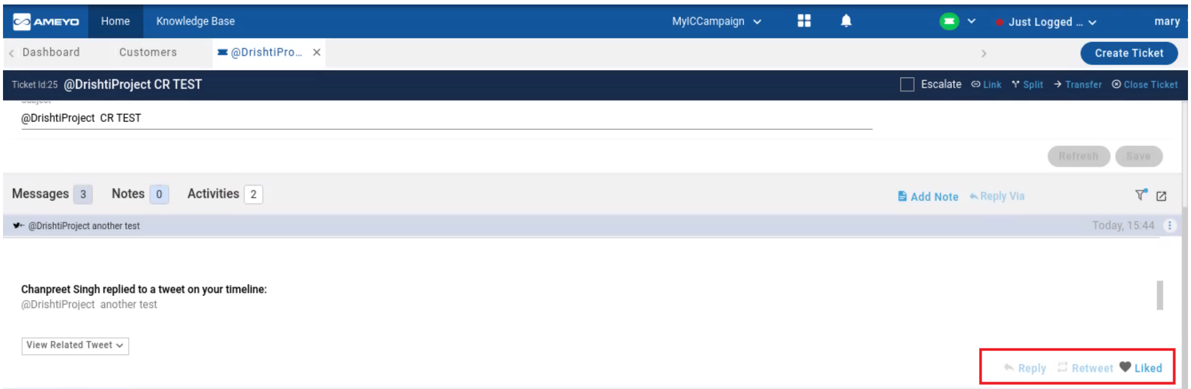


Figure: Liked Post on Twitter

10.3.4.4 Reply on Twitter DM Ticket

Click on the Twitter ticket received through Twitter DM from the customer. Following page opens up.

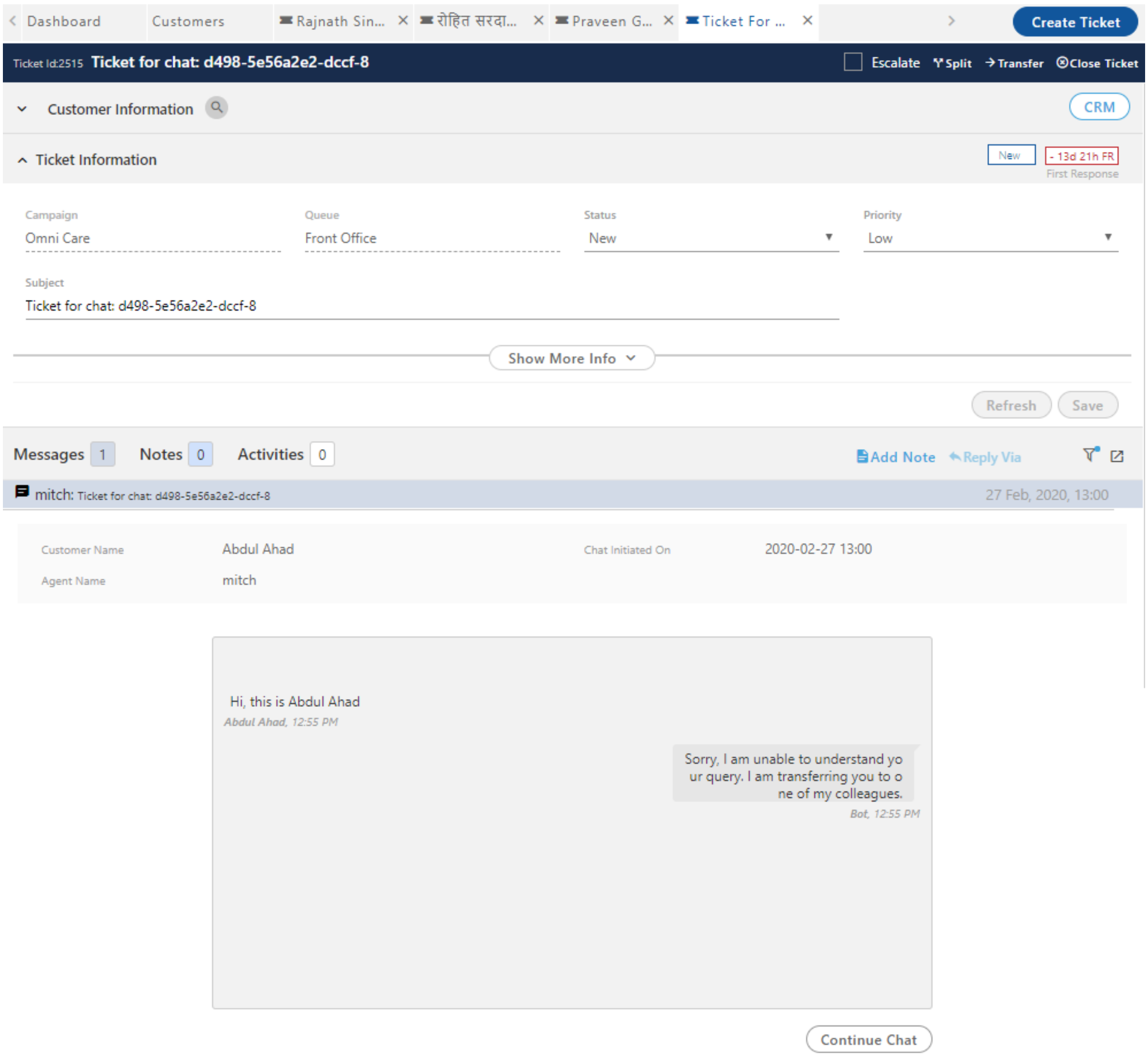


Figure: Customer's Twitter Ticket

All the operations which the agent can perform on Twitter post ticket can be performed on the ticket raised through Twitter DM. Know more...

Reply: Click 

button to reply to the customer on the ticket. After clicking this button the chat with the customer starts and hence, the agent is able to continue chat to the customer.

After clicking "Continue Chat" button the following chat window is displayed.

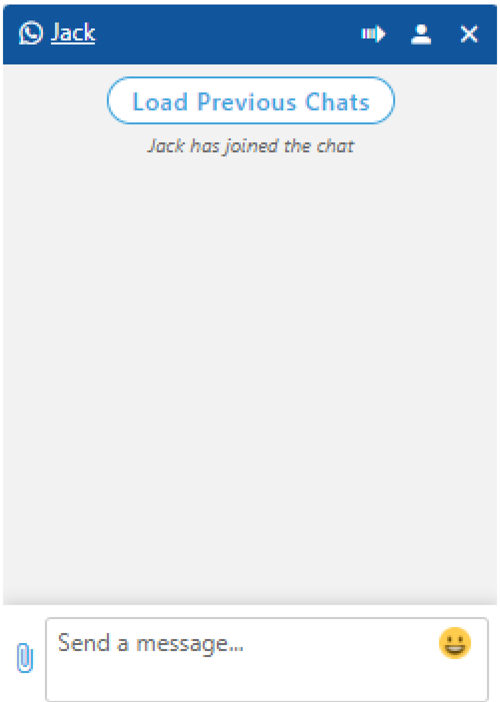


Figure: Continue Chat Window

The agent can perform the following operations here.

- The agent can reply to the customer.
- The agent can send media files such as audio, video, pdf, docx, images and so on.
- The agent can view previous chats, by clicking "Load Previous Chats" button present at the chat window. By default, the previous chat will not be loaded. The agent has to click this button to view previous chats.

Except reply option, all other options are same that are described above.

10.3.4.5 Attachment

Image and Video can be added as attachment while replying to a tweet. Ameyo User can upload either up to 4 images or one video at a time. The maximum file size limit for an image is 5 MB, and its supported dimensions should be greater than or equal to 4x4 pixels and less than or equal to 8192x8192 pixels. The maximum file size limit for a video is 15 MB.

- **<u>Supported Image Types for Attachments in Twitter</u>:** .img, .png, .jpg, .jpeg, .webp, .bmp
- **<u>Supported Video Types for Attachments in Twitter</u>:** .mov, .mp4

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10.3.4.6 Send and Receive Message and Attachment as a Single Message

The users are capable of sending and receiving attachments and messages together. It means that, if the customer or user wants to send an attachment with the message, then these messages will count as a single message. It helps the user to provide information about the attachment within the message itself and hence, increases the customer experience.

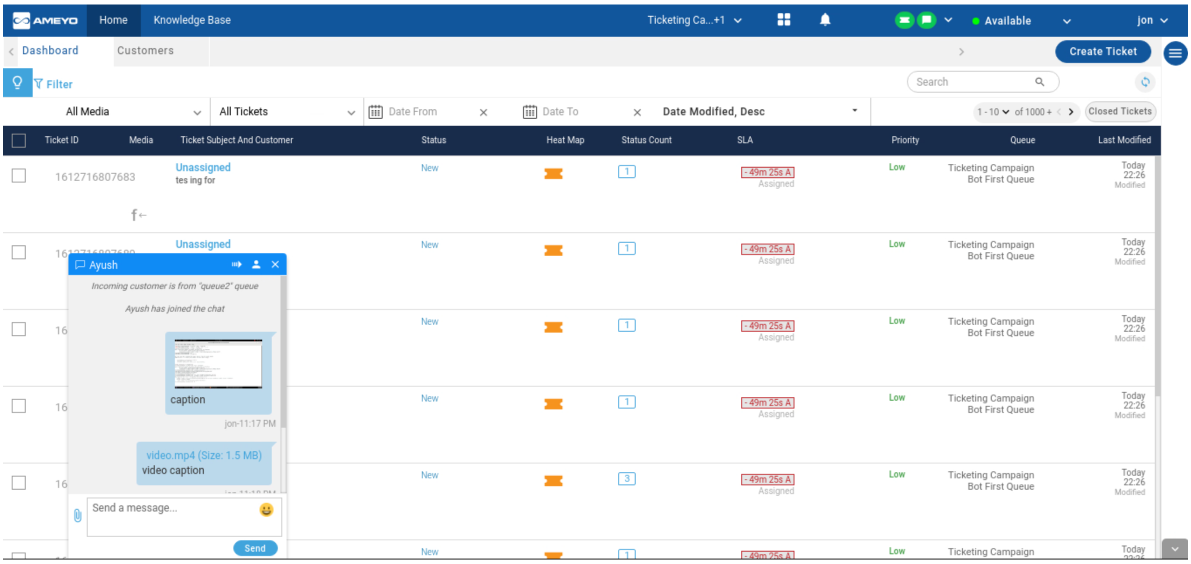


Figure: Sending Message and Attachment together as a single Message

10.3.4.7 Acronyms

The agents can now use the Acronyms while commenting on the customer's post. The agent can use the acronyms that are being created. Know more...

10.3.5 WhatsApp Communication with Customer

The supervisor can communicate with customer using WhatsApp chat, and the working and features are similar for Supervisor as that of the agent. However, the Group Manager does not have the privileges to communicate through WhatsApp with customer, as the group manager is not allowed to work in interaction and chat campaigns.

Whenever a message through WhatsApp is being sent or received from the registered or unregistered WhatsApp Number of a customer, a new ticket is created. All the operations can be performed on the WhatsApp ticket which can be performed on the normal ticket.

10.3.5.1 Send New WhatsApp Message to Customer

The agent is not able to initiate the chat through WhatsApp. The agent can only send the notifications to the unregistered customers. If the customer has replied to that notification then the agent can send the message to the customer.

This same scenario is also applicable to the registered customers, that is, the agent can only send the notification to that customer. And after the reply of the customer the agent can start the chat.

However, the agent can start chat once the customer replied to the notification sent to the customer's registered number.

10.3.5.2 Receiving WhatsApp Message

Whenever a customer sends the message on WhatsApp to the organization, a new ticket corresponding to the campaign and the queue will create. The agent can view that WhatsApp tickets on the dashboard and can reply on them as well, if the ticket is assigned to that agent.

10.3.5.2.1 Identification of WhatsApp Tickets

When the ticket corresponding to the WhatsApp chat is created then, the  icon is displayed in front of the ticket. The icon shows that the ticket is created using the WhatsApp message.

10.3.5.2.2 Reply on WhatsApp Ticket

Click on the WhatsApp ticket created after the chat with the customer. Following page opens up.

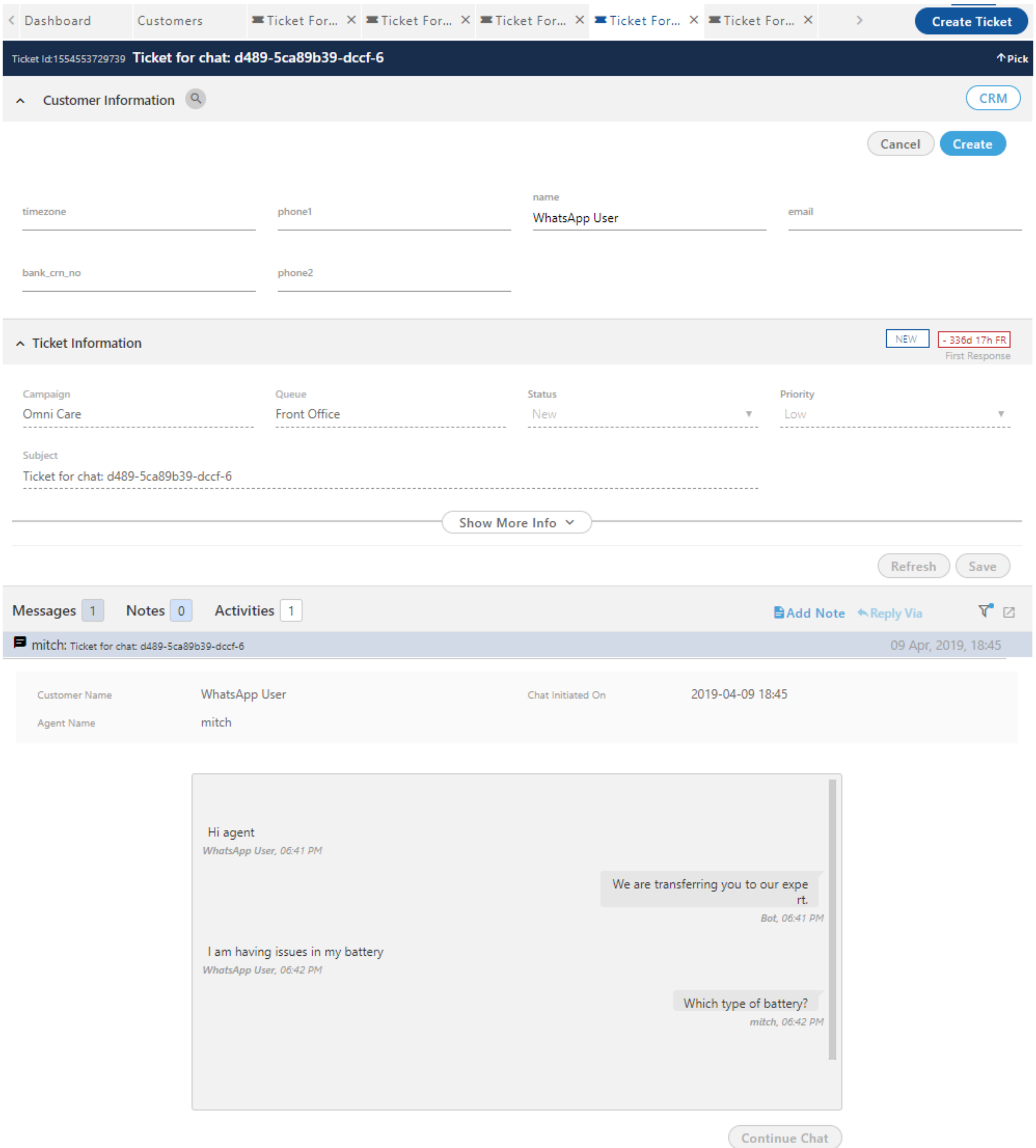


Figure: Customer's WhatsApp Ticket

Following operations can be performed on the received WhatsApp ticket.

1. **<u>Basic operations</u>:** There are four basic operations which agent can perform on the tickets received from the customer.

    A. **<u>Escalate</u>:** Enable the "Escalate" checkbox to escalate the ticket to the higher authority like the supervisor.

    B. **<u>Split</u>:** It allows the agent to divide the ticket into two parts. The split feature can be used when there a single ticket contains multiple issues to be resolved by different teams or agents.

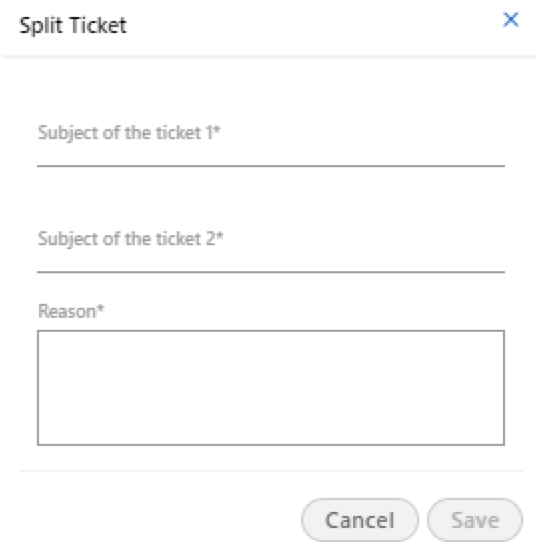


Figure: Split Ticket pop-up

Perform the following steps to split any ticket.

- Click 

icon to split the ticket. A pop-up comes up.
- Provide the subject for "Ticket 1".
- Provide the subject for "Ticket 2".
- Provide the reason for the splitting of Ticket.

C. **<u>Transfer</u>:** The transfer option lets the agent to transfer the ticket to another queue depends upon the requirement raised by the customer.

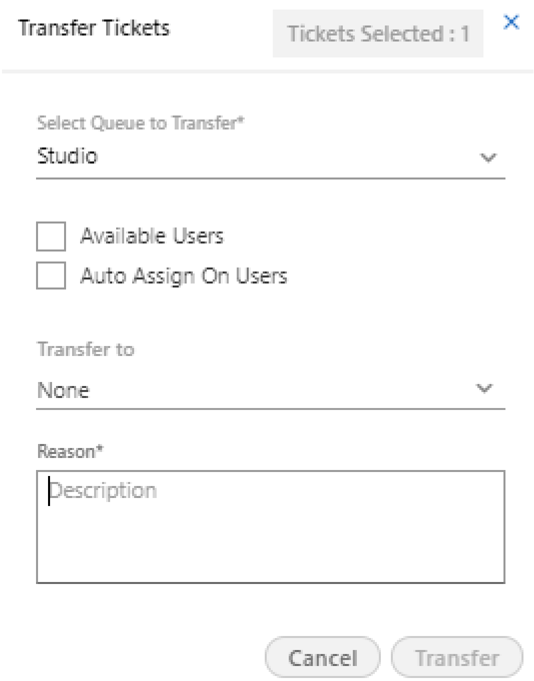
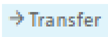


Figure: Transfer Ticket pop-up

Perform the following steps to transfer any ticket.

- Click 

 icon to split the ticket. A pop-up comes up.
- Select the Queue name from the drop-down list of Queues.
- Enable the "Available Users" checkbox to assign the ticket to any agent who is available at that moment.
- Enable the "Auto-assign On Users" checkbox to assign the ticket to any agent automatically by Ameyo.
- Select the user's name in "Transfer to" drop-down list, if you want to assign the ticket to any particular agent in the queue specified above.

- Provide the reason for the transferring the Ticket in "Reason" textbox.
- Click "Transfer" button to transfer the ticket.

D. **Close Ticket:** Click "Close" ticket button to close the ticket. After clicking on the close ticket option, a pop-up comes up.

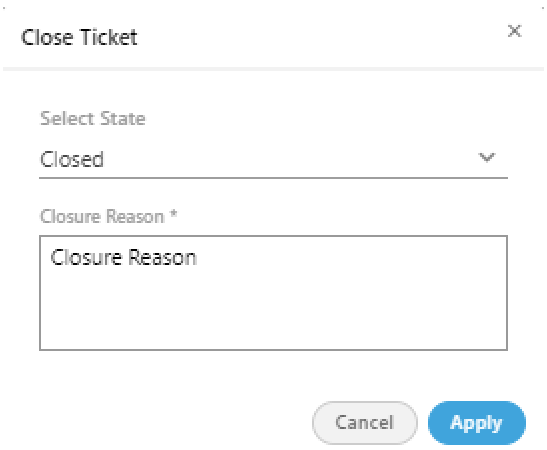


Figure: Closing Ticket

- Select the status of the ticket from the drop-down menu of the "Select State". Agent can select one of the states which are created under the closed state by the administrator.
- Provide the "Closure Reason" for which you are trying to close the ticket.
- Click "Apply" button.

2. **Customer Information:** The first section of the page contains the information of the customer. Agent can view or modify the information. Know more...
3. **View Customer Cards:** If more than one customer is created with the same information, then number of such customers with same information will be displayed with icon. You can click this to view the customer cards.

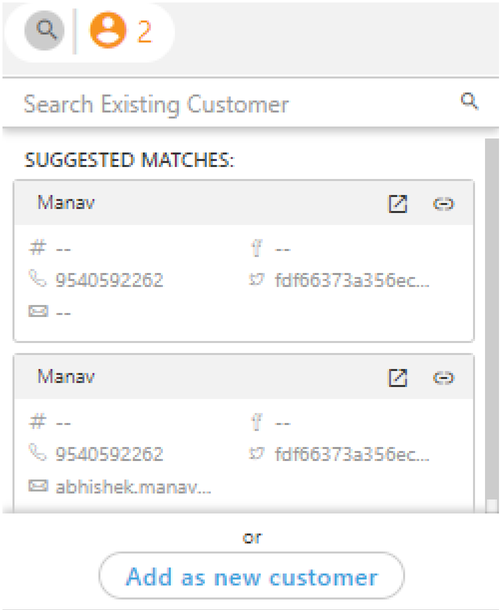


Figure: Customer Cards

Here, the agent can click to view the Customer Information in a new tab. You can also click icon to link this customer with other customer having same information.

If the customer is new and needs to create a new customer with the provided information, then click "Add as new Customer-+" icon. After clicking the icon all the details will be automatically filled into the customer information tab. Fill all the information and click "Create" button to create new customer.

4. **Ticket Information:** It contains the information of the ticket which involves the following fields.

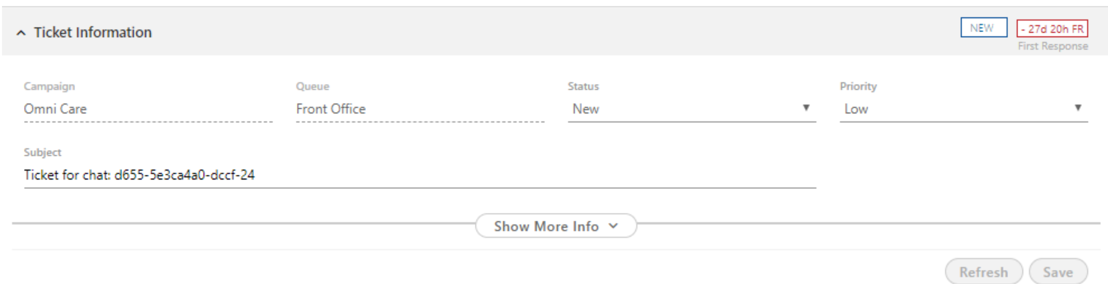


Figure: Ticket Information

A. **Ticket State:** It shows the state of the ticket in which the ticket is opened with the agent.

B. **First Response:** It shows the first response on the ticket. First response is the time is the time when the first response has been delivered to the customer. It shows on the right side of the ticket information bar.

C. **Campaign:** It contains the name of the campaign in which the ticket has been arrived.

D. **Queue:** It shows the queue name in which the ticket has been arrived.

E. **Status:** It shows the status of the ticket. You can change the ticket status from here. Select the status which you want to set.

F. **Priority:** It shows the priority of the ticket. Agent can change the priority of the ticket from here as well. Select the priority of the ticket from the drop-down menu.

G. **Subject:** It contains the subject of the ticket.

H. **Show More Info:** Click "Show More Info" button to view more information of the ticket. It contains the custom fields created by administrator. If there are no custom fields then there will not be any fields.

You can hide this custom information of the customer. Click "Show Less Information" button to hide this section of the information.

5. **Link Tickets:** The link ticket section allows the agent to link multiple tickets with each other. In this, a parent ticket is linked with its subordinates tickets which treats like child tickets for the parent tickets. Know more...

6. **<u>Messages</u>:** It contains the complete list of messages sent by the customer through WhatsApp.

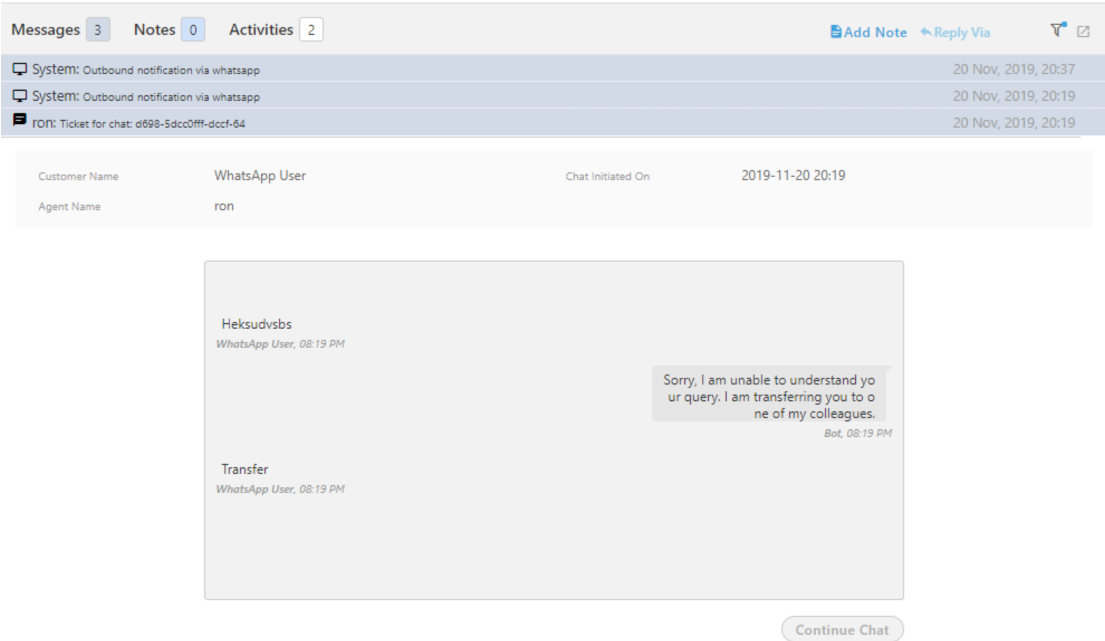
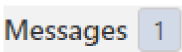


Figure: Chat of Customer through WhatsApp in Message Section of Ticket

The message also contains the complete chat done over the WhatsApp in between the agent and customer.

Agent can perform the following operation on the message section.

A. **Read Message:** Agent can simply read the chat of the agent and customer.

B. **Message count:** The message count 

represents the total number of the fellow tickets on this same ticket.

C. **Notes:** The notes count 

shows the total number of the notes which has been given on ticket of the customer.

D. **Activities:** The activities count 

shows the total number of the activities performed on the ticket.

E. **Export Tickets:** Export tickets option provides the feature to save all the tickets in CSV format to agent's system. Perform the following steps to export tickets.

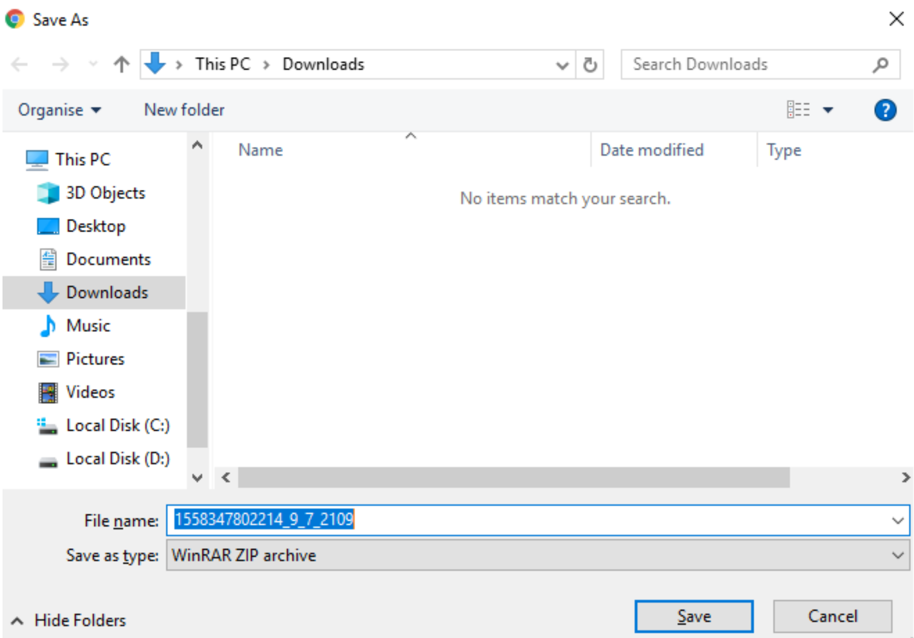
- Click  icon to export all the WhatsApp tickets of the customer.
- A pop-up opens up, which allows agent to download folder on specific location.
- 

Figure: Export Tickets

- On the opened pop-up, provide the name of the file, if you want to change, it contains the default name of the file contains the date and time of the WhatsApp ticket arrived at the system.
- Click "Save" button.

F. **Add Note**: Click Add Note icon to provide the note on the ticket. After clicking on the icon, following wizard opens up.

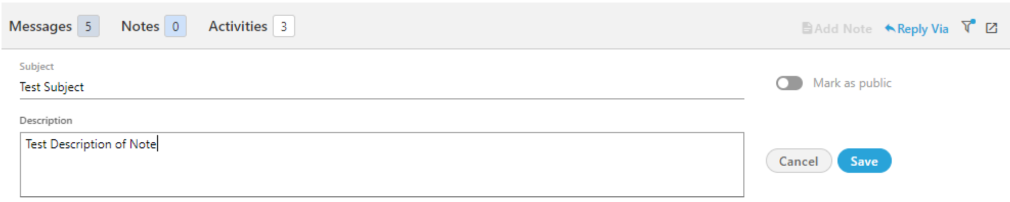


Figure: Enter Note

There are two type of notes which can be given.

- **Public Note:** When the agent wants to show the note to all the viewers of tickets, whether the users or the customer, then pubic note can be provided. The public note is visible to all the agents, supervisors assigned in that campaign and also to the customer.

  However, currently there is no mechanism for customer to see the public note.

  Toggle the Mark as public switch to provide the public note. After toggling the switch enter the subject and description of the note and click "save" button.

- **Private Note:** When the agent wants to provide the note only for the personal use, then a private note can be applied. The private note is visible to all the agents and supervisors who are assigned in that campaign.

  By default, a note is marked as private, until the status of the toggle button is not changed. For private note, enter the subject and description of the note and click "save" button.

G. **<u>Filters</u>:** If there are more than one message send by the customer, then agent can filter the messages according to the need.

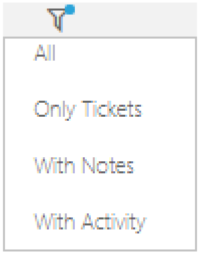


Figure: Filter the Messages

Following filters are available. By default, "Only Tickets" filter will remain selected that will show only ticket messages and no notes will be displayed.

- **All:** It shows all the tickets and notes send by the customer.
- **(Default) Only Tickets:** It filter those messages which are considered as tickets.
- **With Notes:** It shows all the tickets with all notes provided. If the note is provided on any ticket, then agent has to apply this filter to view the note on the ticket. After the
- **With Activity:** It filter those messages on which some activity has been performed.

- You have to select "All" or "With Notes" filter to show the notes.

H. **<u>Access a Note</u>:** Select "All" or "With Note" filter to access the notes. All the tickets and notes are visible as the collapsible sections.

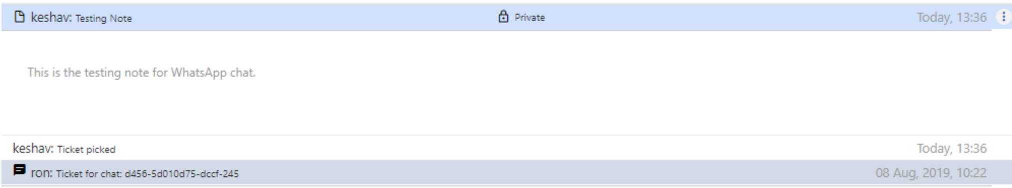


Figure: Ticket with the Note

Click the note to access it. On the collapsible bar, Public label is displayed for a public note, whereas Private is displayed for a private note.

I. **Update and Delete a Note**: Click icon to update or delete the note.

All the agents and supervisor assigned in the same Interaction Campaign, can update and delete both public and private notes on the assigned ticket.

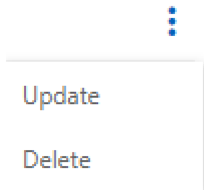


Figure: Options to Update or Delete the Note

It shows the following two options.

- **Update:** Click "Update" button to edit the note inline.

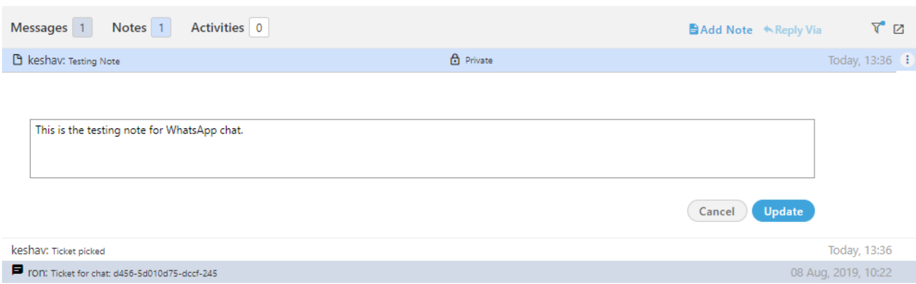


Figure: Update Note

"Update" button only be visible once the agent changes the note. Click "Update" button to save the changes.

- **Delete:** Click it to delete the note. A confirmation pop-up is displayed.

  If the note is deleted, then it cannot be retrieved in any manner. It will be deleted permanently.

  The following screenshot shows the confirmation message before deleting a public note.

Figure: Confirmation pop-up

The following screenshot shows the confirmation message before deleting a private note.

Figure: Confirmation pop-up

Click "Delete" button to delete the note permanently, else click "Cancel" button.

J. **Reply:** Click Continue Chat button to reply to the customer on the ticket. After clicking this button the chat with the customer starts and hence, the agent is able to continue chat to the customer.

   After clicking "Continue Chat" button the following chat window is displayed.

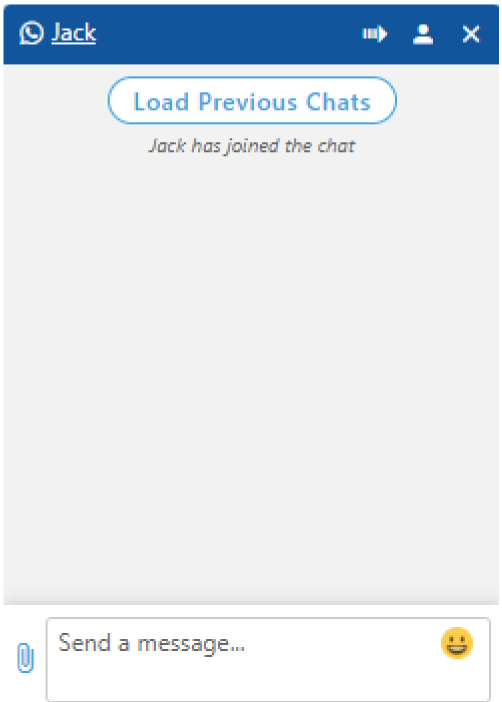


Figure: Continue Chat Window

The agent can perform the following operations here.

- The agent can reply to the customer.
- The agent can send media files such as audio, video, pdf, docx, images and so on.
- The agent can view previous chats, by clicking "Load Previous Chats" button present at the chat window. By default, the previous chat will not be loaded. The agent has to click this button to view previous chats.

The reply option from here is bounded with the time frame provided by WhatsApp. After the expiry of this time, you cannot start WhatsApp chat from here. In such cases, the agent can reply to the customer through other mediums like calling, email, and so on.

For further information about WhatsApp communication, click here.

10.3.5.3 Reply via WhatsApp Feature

In "Reply Via" option, "WhatsApp" option has been added that will be available when WhatsApp is integrated into Ameyo Application Server.

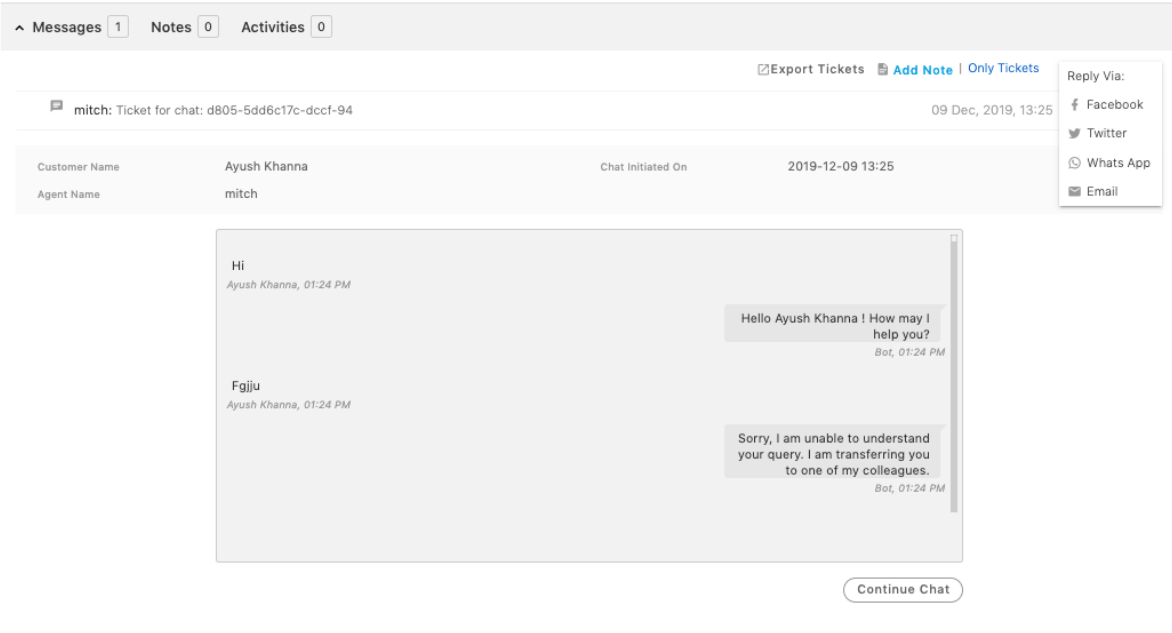


Figure: Reply Via Options

If a Chat Campaign is not selected, then the above options will be disabled for all channels, and a message is displayed in the tooltip on the mouse hover.

10.3.5.4 Process

While sending the message, sendMessageAPI is used to check whether the 24-hour window is still active or not.

- **24-hour window is active:** If the 24-hour window is active, then the message will be sent. If the success response for the delivery is received, then the message will be displayed as delivered.
- **24-hour window is expired:** If the 24-hour window has expired, then the message will be failed to send, and there will be a failure callback with error 470.

- **If user initiated outbound messages are allowed:** Use the message template configured for text message or attachment to send the agent's message content as an outbound message. During this action, the system will check the type of message to find out and select the suitable message template. For example, "image" template will be used for image, "text" template will be used for text, and so on.
- **If user initiated outbound messages are not allowed:** It will be indicated that the message is failed to send, and a message is displayed to inform the agent. The chat input box will be disabled to prevent sending any more messages.
- **For any other errors:** Show that the message failed to send.

10.3.5.5 If Not Configured

If the Administrator has neither configured the WhatsApp Outbound Notifications nor enabled the option to allow the Ameyo User to reply via WhatsApp even after 24 hours, then the textbox to send the messages will be disabled in the Chat modal.

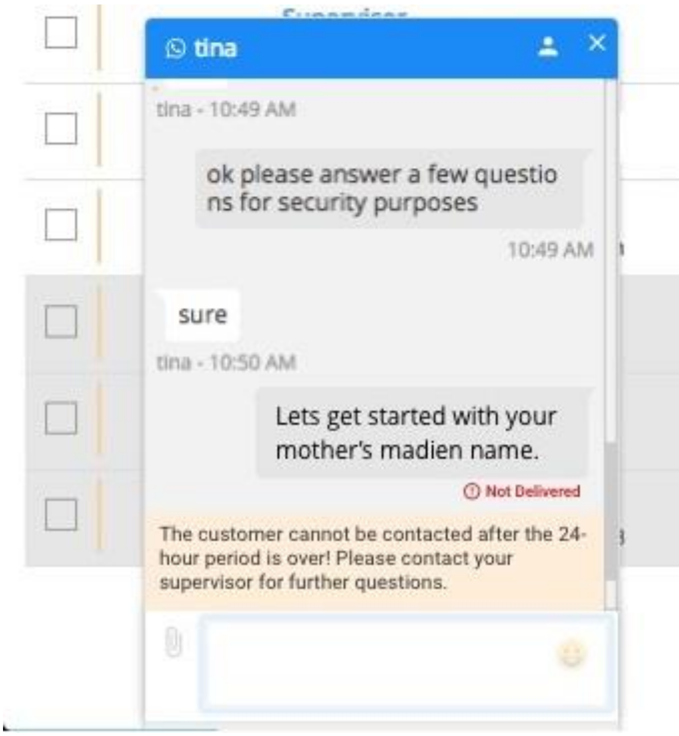


Figure: Chat is disabled as the User is not allowed to continue chat after the 24-hour period

10.3.5.6 Normal Behavior

If the Administrator has configured WhatsApp Outbound Notifications as well as enabled the option to allow the Ameyo User to reply via WhatsApp even after 24 hours, then the textbox to send the messages will remain enabled in the Chat Modal.

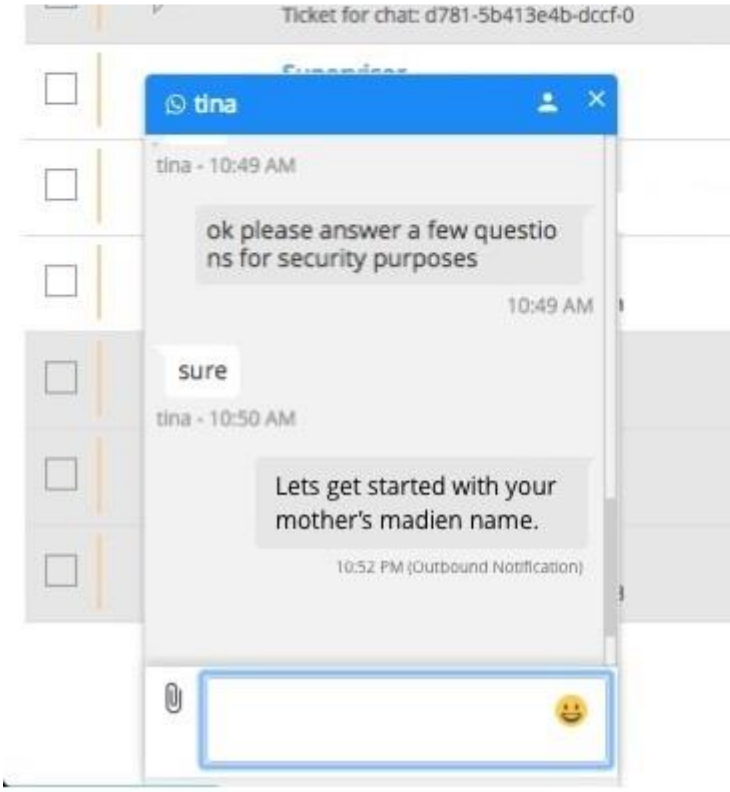


Figure: Chat is enabled

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10.3.6 Send and Receive Message and Attachment as a Single Message

The users are capable of sending and receiving attachments and messages together. It means that, if the customer or user wants to send an attachment with the message, then these messages will count as a single message. It helps the user to provide information about the attachment within the message itself and hence, increases the customer experience.

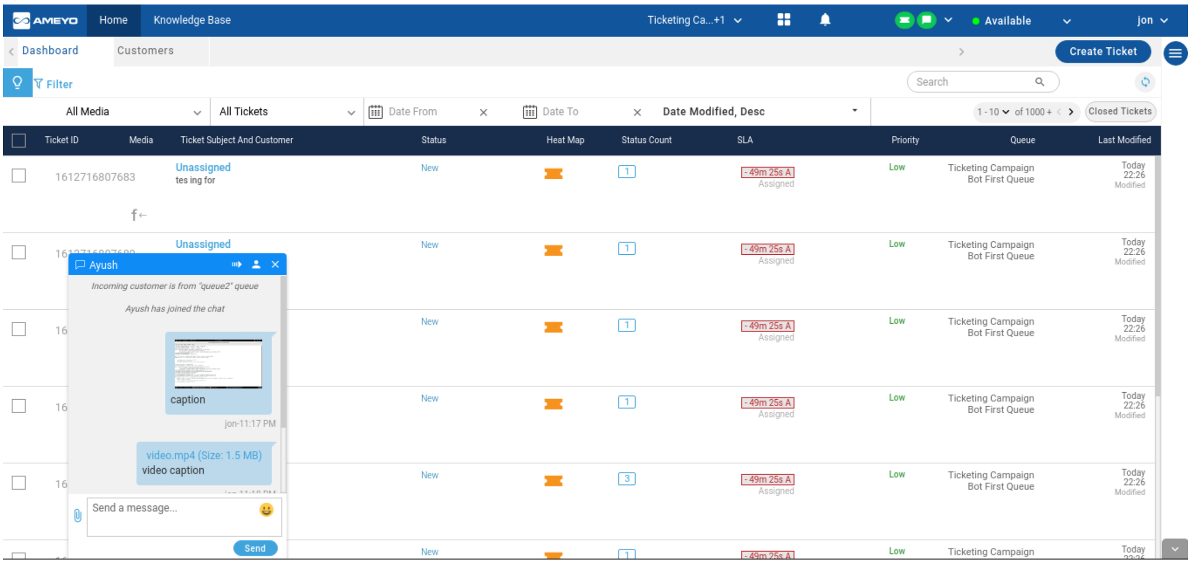


Figure: Sending Message and Attachment together as a single Message

10.3.7 Acronyms

The agents can now use the Acronyms while commenting on the customer's post. The agent can use the acronyms that are being created. Know more...

10.3.7.1 FAQs

10.3.7.1.1 Q: Can I send any message to any user at any time?

No.

If a user contacts an enterprise, the enterprise can respond with any type of message in the next 24 hours. This type of message is free.

But if the enterprise is contacting a user before the user sends a message or after more than 24 hours have passed, the enterprise can only send a message template. This is a paid notification.

Free-form text messages and media messages will not work outside this 24-hour window. They will result in a failure callback with error 470.

Reference:
https://developers.facebook.com/docs/whatsapp/faq#faq_304185363498132

10.3.7.1.2 Q: How do I handle cases where I need to send customer care response after 24h?

There may be cases where you need more time to handle a customer query and may only be able to respond after 24 hours. We recommend creating message templates to either:

- deliver the result to the user, or
- prompt the user to reply to activate the customer service window.

In both cases, please ensure you provide as much context to the message template as possible. For example:

- "Hello {{1}}, regarding the issue you reported earlier, we regret to inform you that {{2}}. Apologies for any inconvenience caused."
- We have updates regarding your ticket. Please respond back if you'd like to continue support."

10.3.8 Missed Chats

There are often times when the customer initiated the chat in non-working hour or sometimes the agent failed to reply to the customer on-time, thus the customer left without getting any reply. In such cases, a missed chat is being recorded in the system. The agent can see such missed chats and also can reply to the customer. There are times when the missed chat can be recorded from already registered customer or sometimes new customer can also register for the missed chat.

A missed chat can be recorded in the following scenarios.

1. The customer messaged during Non-office hours or on holiday.
2. The agent is not free and the customer left chat after some time.

3. The customer sent the message and left chat without waiting for the reply.

Following screenshot shows the created missed chat ticket from the customer.

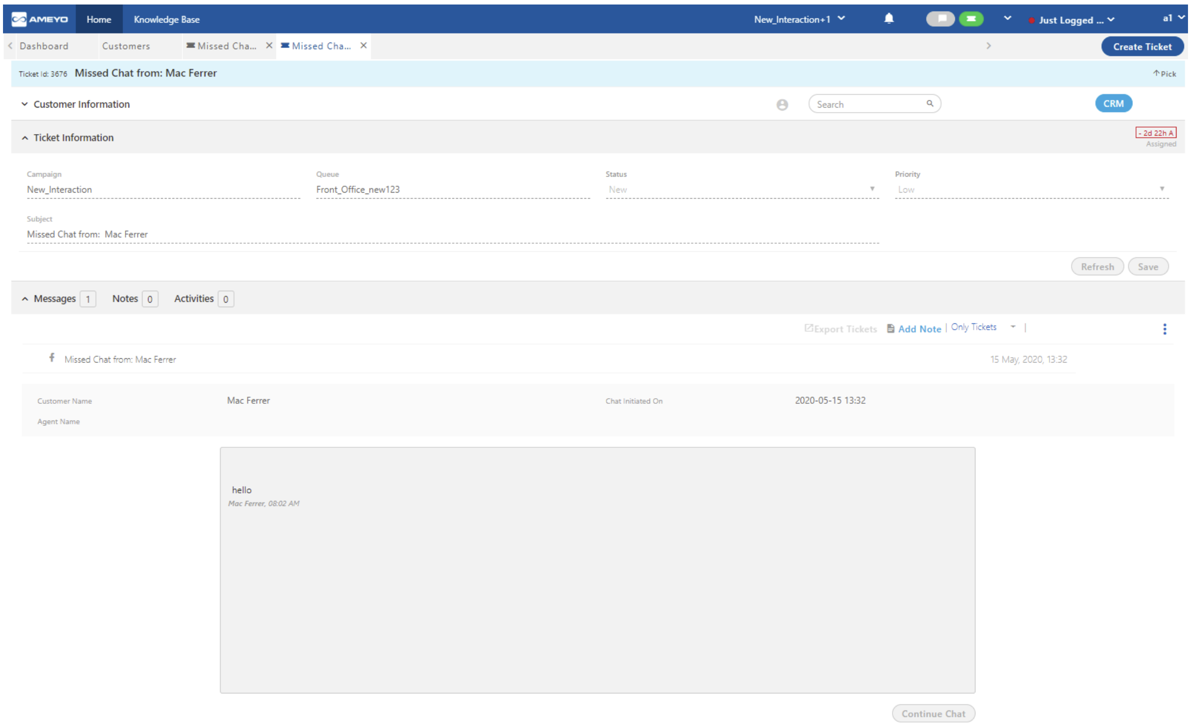


Figure: Missed Chat Ticket

Perform the following steps to reply to the customer whose chat was missed.

1. If missed chat is from the unknown customer, then create the customer for that chat, else if, the missed chat is from known customer, then the agent can link that customer to the already existing customer.

   If the agent does not provide the customer information, then the agent will not be able to reply to that customer. It means that it is required to create the customer first.

2. Click "Create New Customer" option present in the customer details and provide the information about the customer.
3. If the customer is returning customer, that is, the customer is already existing in the system, then you can link that customer to the existing customer. The following screenshot shows the linking of the ticket.

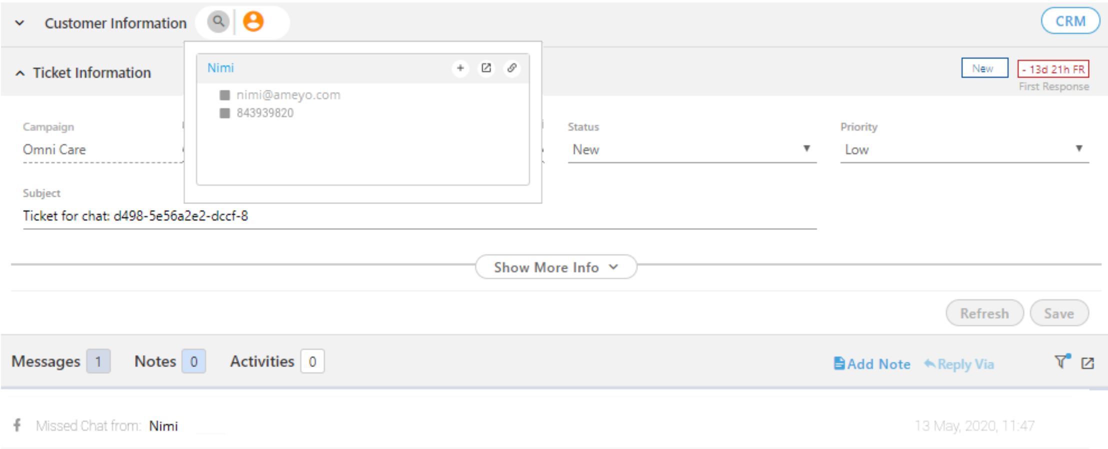


Figure: Linking Customer in Missed Chat

4. Once the customer is created "Continue Chat" button is visible. The agent can click "Continue Chat" button to start the chatting with the customer.
5. After clicking "Continue Chat" button, the agent can continue chatting with the customer through chat wizard.

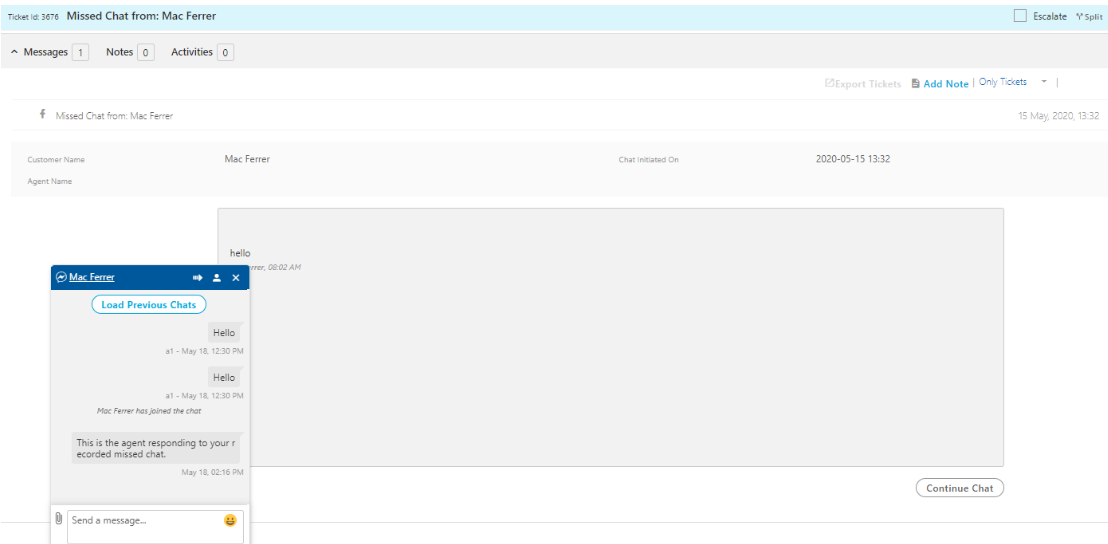


Figure: Continue Chat with Customer

If the customer is a returning customer, then in Ameyo Web-Chat modal "Load Previous Chats" option is shown. The agent can click this option to view the previous chat history with that customer.

10.4 Voice Communication with Customer

10.4.1 Voice Communication with Customer

Voice Communication with the customer can be established through inbound calls in any Inbound (Interactive Voice Application) Campaign, Outbound Voice Campaign, and Predictive Voice Campaign.

Voice Communication can be established using any of the following ways. Click the links to know more about them.

- Voice Telephony Panel
- Inbound Call
- Outbound Call
    - Outbound Click to Call
    - Outbound Manual Dial Call
    - Manual Preview Dial Call
    - Auto-dial Outbound Call
    - CTI Display
    - Call Control Functions
    - Schedule Callback
    - Call Details

10.4.2 Voice Telephony Panel

All the functionalities of voice telephony panel for supervisor and group manager are similar as that of agent.

There are two types of telephony panels available in Ameyo.

10.4.2.1 Voice Telephony Panel for Soft-Phone

In order to make a call, the agent has to click button,a pop-up slides to the left at the top right corner.

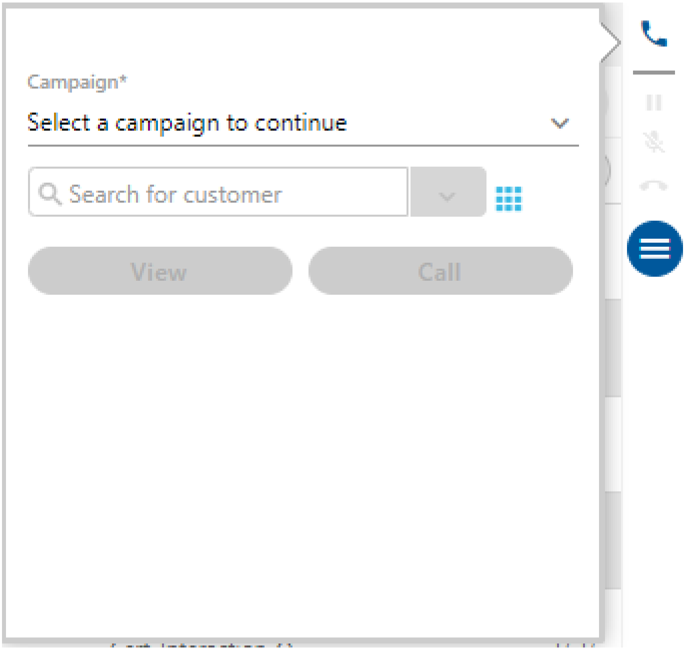


Figure: Telephony Panel

The opened pop-up is the telephony panel for the Soft-Phone, which is used to dial the call to the customers. For the soft-phone selection, the agent has to select the soft-phone extension provided by the organization.

10.4.2.2 Voice WebRTC Telephony Panel

In order to make a call, the agent has to click button,a pop-up slides to the left at the top right corner.

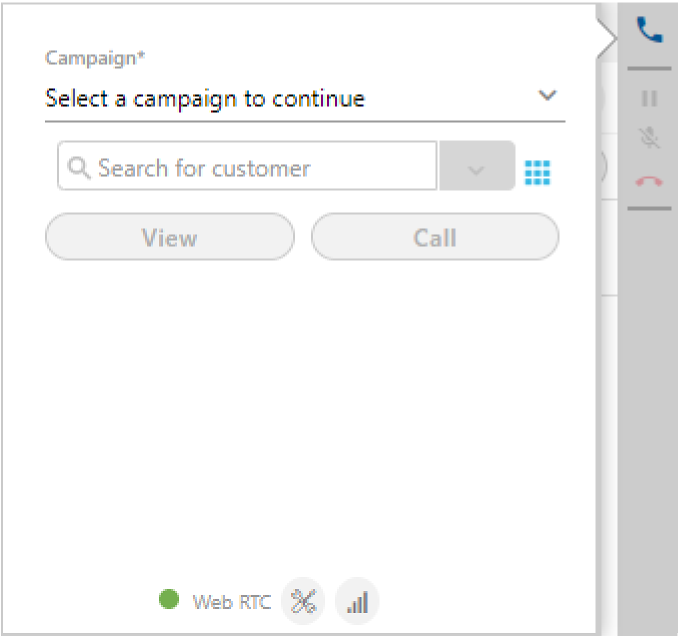


Figure: Telephony Panel

The opened pop-up is the telephony panel for the WebRTC, which is used to dial the call to the customers.

Refer to the following pages.

- Troubleshoot WebRTC Telepony Panel
- Monitor Health of Calls made using WebRTC

10.4.2.2.1.1 Functions on Telephony Panel

-
- Searchable Fields of Telephony Panel: It is quite normal for the agent to search the information of the customer before making a call. The agent can search the customer through the information which is present with the agent, and if that field is searchable. This feature is configurable and can be configured by the administrator at the time of campaign creation.

  If the agent is staffed in the multiple campaigns, then the agent has to select the campaign in the Telephony Panel first.

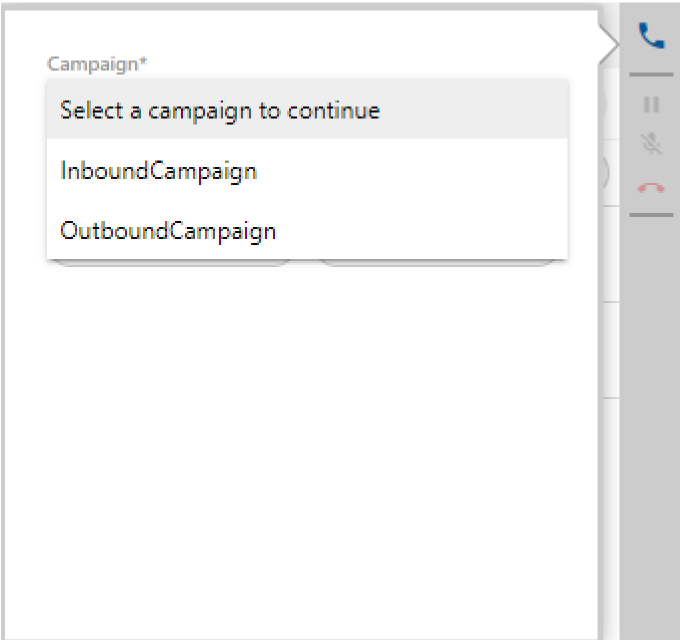


Figure: Campaign Selection

After selecting the campaign, the user can click the search bar in the telephony panel to access the list of searchable fields. By default, only one field can be selected to conduct the search for the typed keywords.

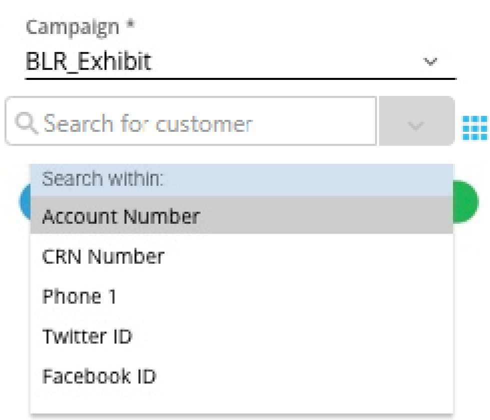


Figure: Select Field in Telephony Panel

Only the searchable fields set in the data table will be listed here. If the configuration is done at the backend about the searching keywords then the Ameyo User can select the fields in which the search has to be performed.

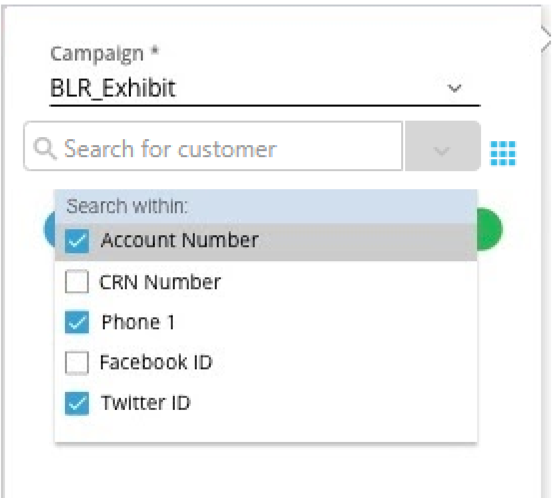


Figure: Select the Searchable Fields in the Telephony Panel

After selecting the fields, the Ameyo User can type any keyword and click "View" or "Call". If multiple customers are found for a single keyword result, then a modal is displayed in which the Ameyo User can select the required customer.

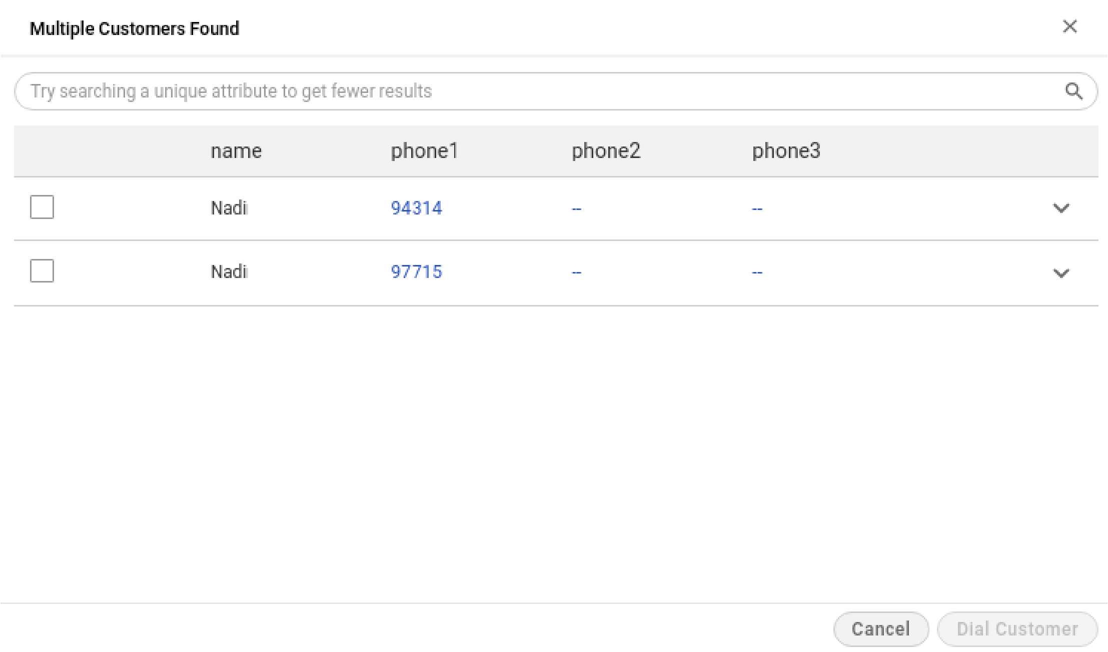


Figure: Multiple Results for a search

Click "View" to view the Customer Information page and click "Call" to access "Create and Dial" or Dial Only" options.

- Inbound Call
- Outbound Call
- Call Control Functions
- Attach Tickets with Call

10.4.2.2.1.2 Restrict the Users to dispose the call from Telephony Panel and Allow them to dispose it from CRM only

If the administrator has configured and restrict the disposition of the call from the telephony panel, then the agent will not be able to dispose the call from Telephony Panel. In this case, the agents have to dispose the call through CRM only.

As soon as the call is ended, the telephony panel will not slide out to the left side from the right bar.

When the agent tries to dispose of the call in the telephony panel, then an error message is displayed.

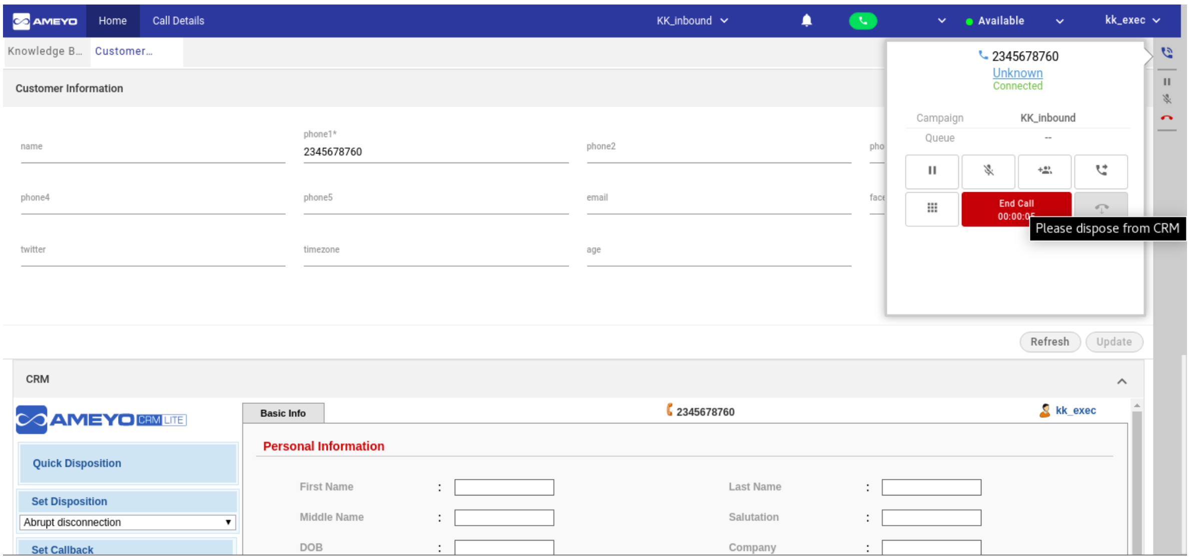


Figure: Disposition of Call is disabled in Telephony Panel

If the disposition is restricted at the telephony panel but can be done at CRM, then the "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.

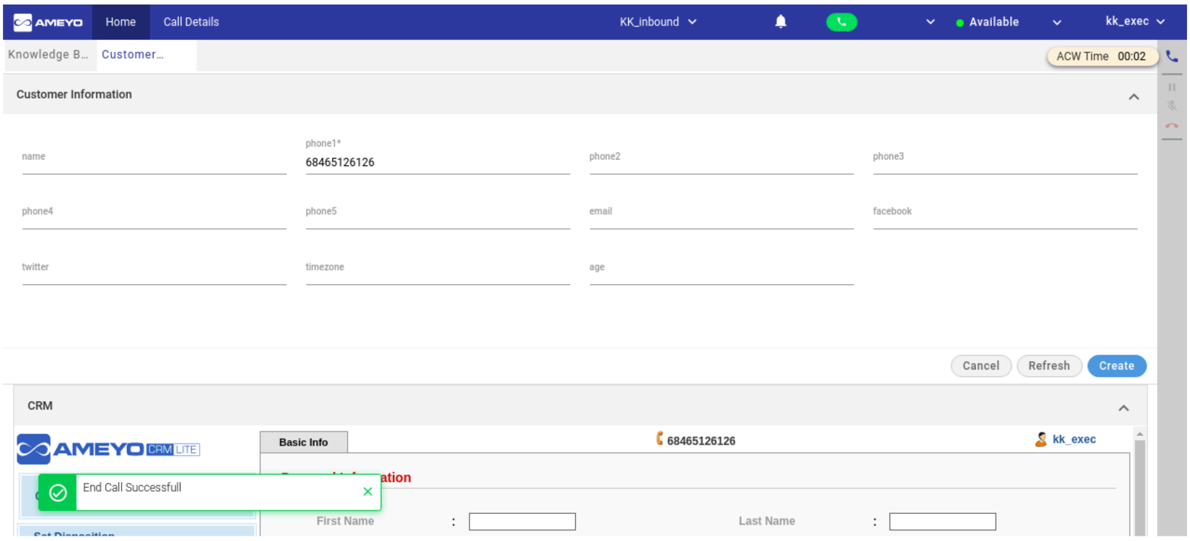


Figure: Disposed of the Call from CRM

If the disposition is disabled from the telephony panel, then Dispose and Dial will also be performed through CRM.

Callback and call notes are understood in the normal disposition operation through the telephony panel only.

10.4.2.2.2 Availability of DID Number in Telephony Panel

The agents of a contact center industry would want to know the destination number (DID) at which the customer made the call. There are possibilities that multiple DIDs are mapped in a single campaign having single or multiple queues. It becomes more important when the agent or customer wants to transfer the call to another user. In such cases, the agent needs to know the DID number. Similarly, the agent would want to know the caller Id / Agent DID assign to the agent in the outbound campaign.

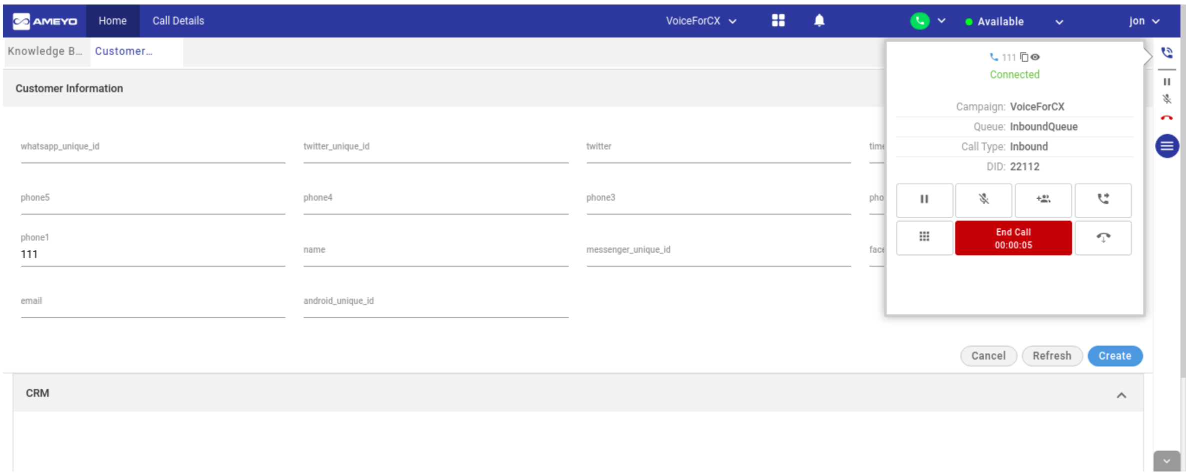


Figure: DID Number showing on Telephony Panel

Now, the DID number will be displayed in the telephony panel of the agent. The agent can see the DID number on which the call has been received. It helps the agents to know the destination number at which the customer made the call to reach that campaign and queue.

Outbound Calls: If the agent has initiated an outbound manual dial call, the Caller ID will be displayed on the telephony panel. If there is no Caller ID configured for that campaign, then "NODID" will be displayed. The same scenario applies to the Auto Dial and Callback calls.

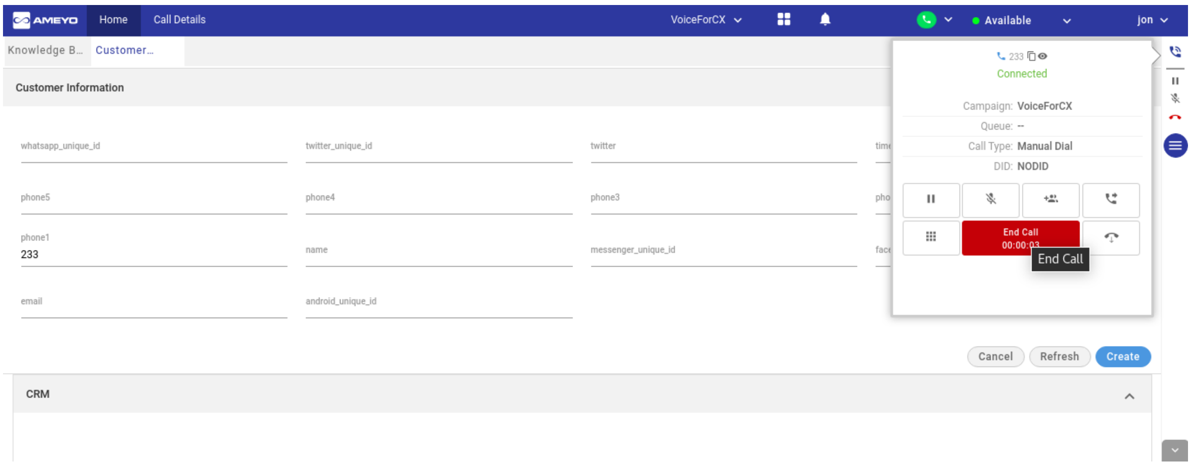


Figure: Caller ID showing for Outbound Calls at Telephony Panel

10.4.3 Inbound Call

All the functionalities of Inbound call for supervisor and group manager are similar as that of agent.

Whenever the agent receives an incoming call or an outbound call assigned by the dialer, a pop-up appears on the screen that overrides all other tasks.

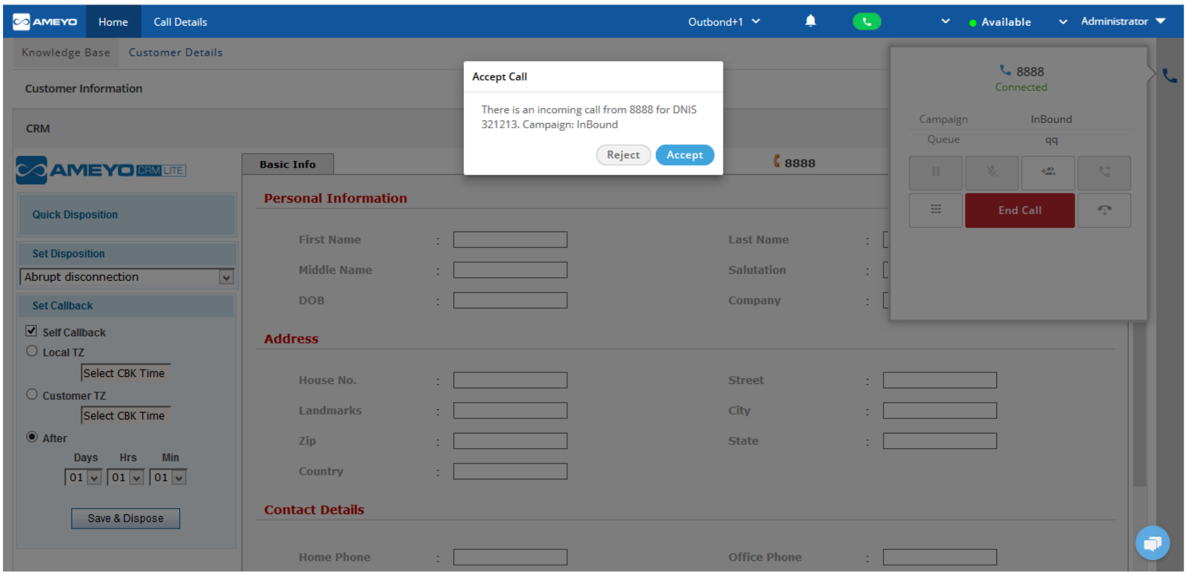


Figure: Call Notification

However, this Accept and Reject pop-up will not be available during the Auto-dial call and manual operations.

The Supervisor can click "Accept" to accept the incoming call, whereas the Supervisor can click "Reject" to reject the call.

This pop-up to accept or reject the call is not displayed when the user is performing manual operations such as dialing the calls manually.

After clicking accept, the call will be connected and the agent can communicate with the customer.

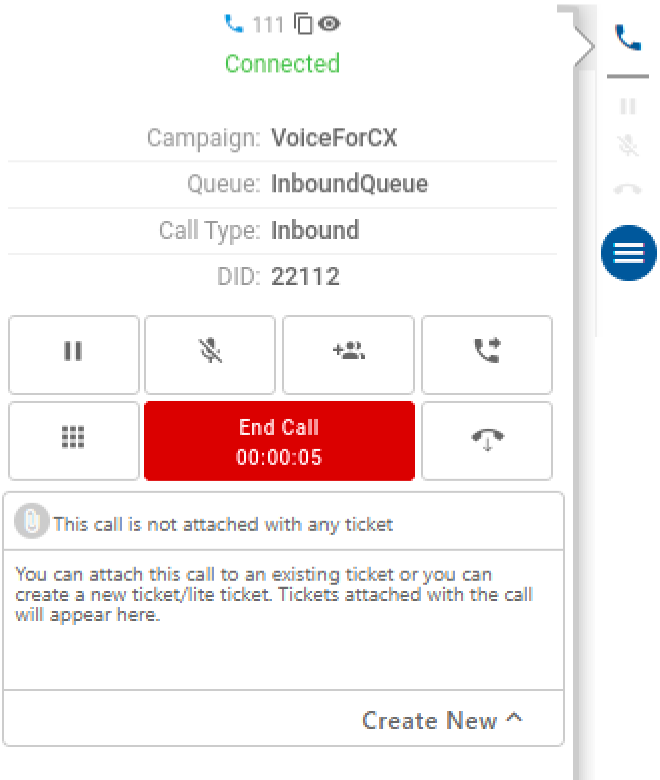


Figure: Agent Communicating with the Customer on Incoming Call

Call Control Functions are discussed in "Call Control Functions" page.

Refer to "CTI Display" Page to know about the CTI Display with an inbound or outbound call.

The agent can add the notes during or after the call. Know more...

After the call the agent can dispose the call. Know more...

10.4.3.1 Availability of DID Number in Telephony Panel

The agents of a contact center industry would want to know the destination number (DID) at which the customer made the call. There are possibilities that multiple DIDs are mapped in a single campaign having single or multiple queues. It becomes more important when the agent or customer wants to transfer the call to another user. In such cases, the agent needs to know the DID number. Similarly, the agent would want to know the caller Id / Agent DID assign to the agent in the outbound campaign.

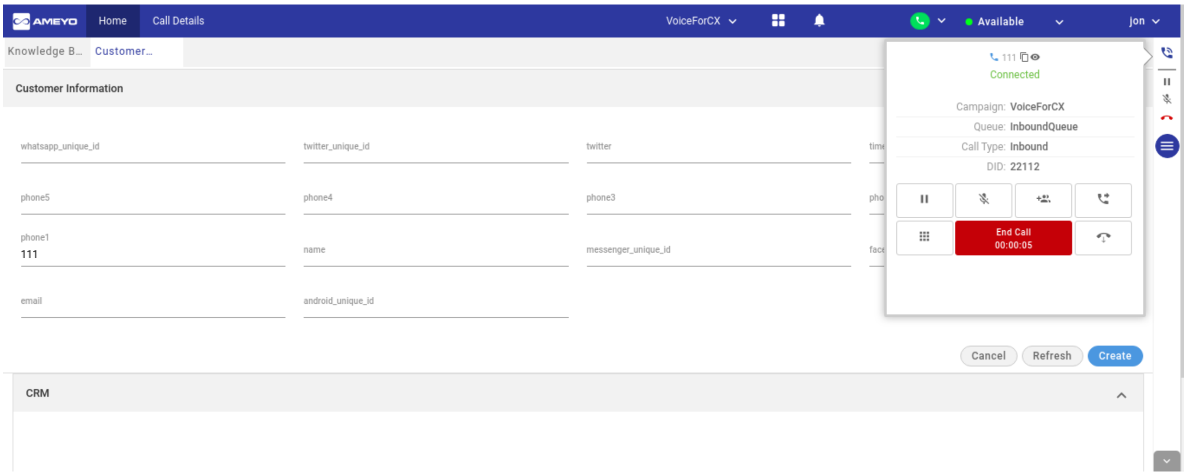


Figure: DID Number showing on Telephony Panel

Now, the DID number will be displayed in the telephony panel of the agent. The agent can see the DID number on which the call has been received. It helps the agents to know the destination number at which the customer made the call to reach that campaign and queue.

10.4.4 Outbound Call

10.4.4.1 Outbound Call to the Customer

There are following three ways to have an outbound call. Click the links to know more about them.

- View Customer Information and Click to Call
- Manual Dial Call
- Manual Preview Dial Call
- Auto Dial Call

10.4.4.2 View Customer Information and Click to Call

All the functionalities of Outbound calling for click to call for supervisor and group manager are similar as that of agent.

It is actually making the call through the customer information. Perform the following step.

1. In "Customers" Tab, click the customer that has a phone number. Its information is displayed in a new tab.

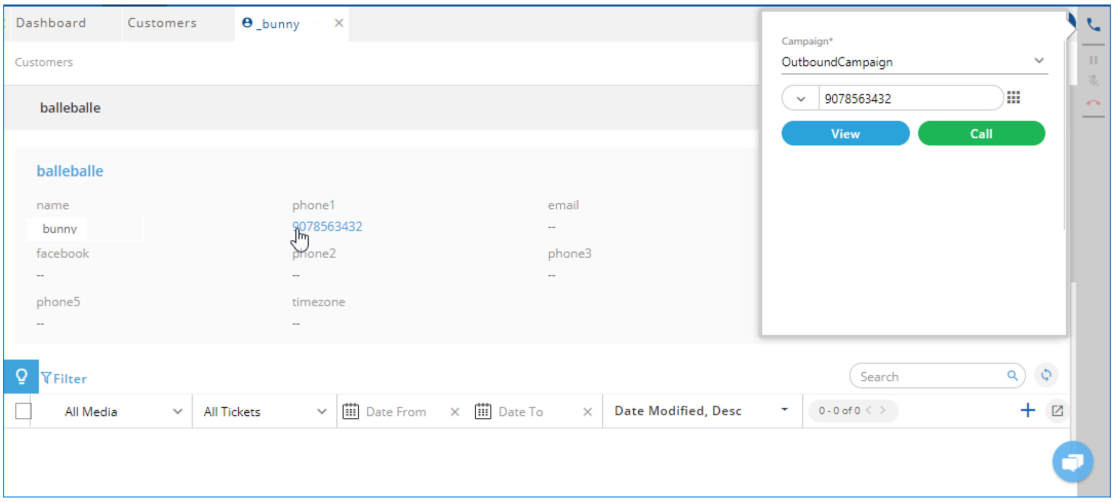


Figure: Calling a Customer through Customer Information

2. Click the number. A pop-up slides from the left side that contains the Ameyo's telephony dialer.
3. If there are multiple campaigns to facilitate outbound calls, the telephony dialer lists them and the agent has to select a campaign. After selecting the campaign, the call is connected and the dialer starts to dial the customer's number.

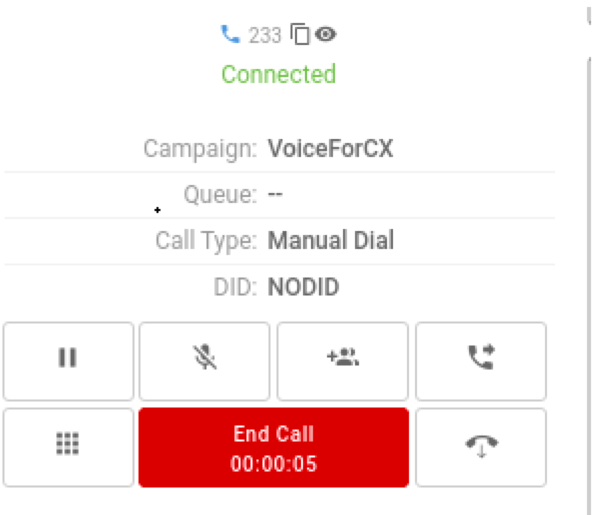


Figure: Calling a Customer

4. Once the customer answers the call, the agent can talk to the customer.

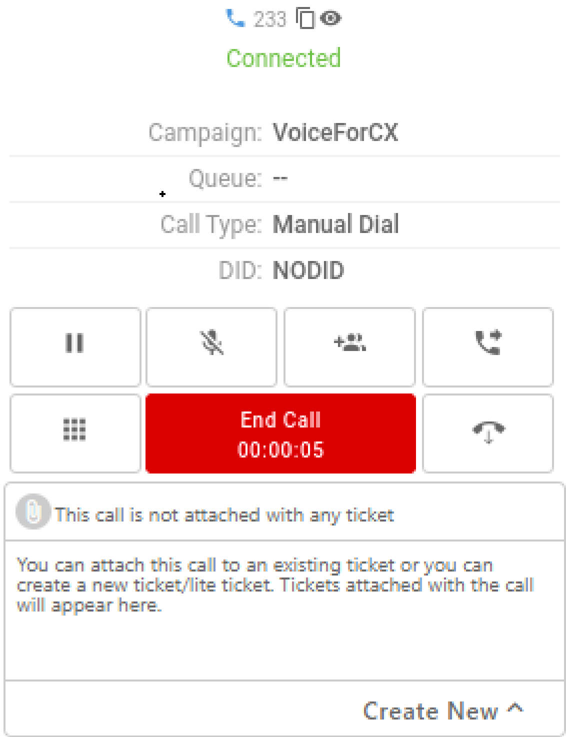


Figure: Ongoing Outbound Call

Now, the Keypad will be replaced with the call control functions. Know more...

5. The agent can add the notes during or after the call. Know more...
6. After the call the agent can dispose the call. Know more...

10.4.4.3 Availability of DID Number in Telephony Panel

If the agent has initiated an outbound manual dial call, the Caller ID will be displayed on the telephony panel. If there is no Caller ID configured for that campaign, then "NODID" will be displayed. The same scenario applies to the Auto Dial and Callback calls.

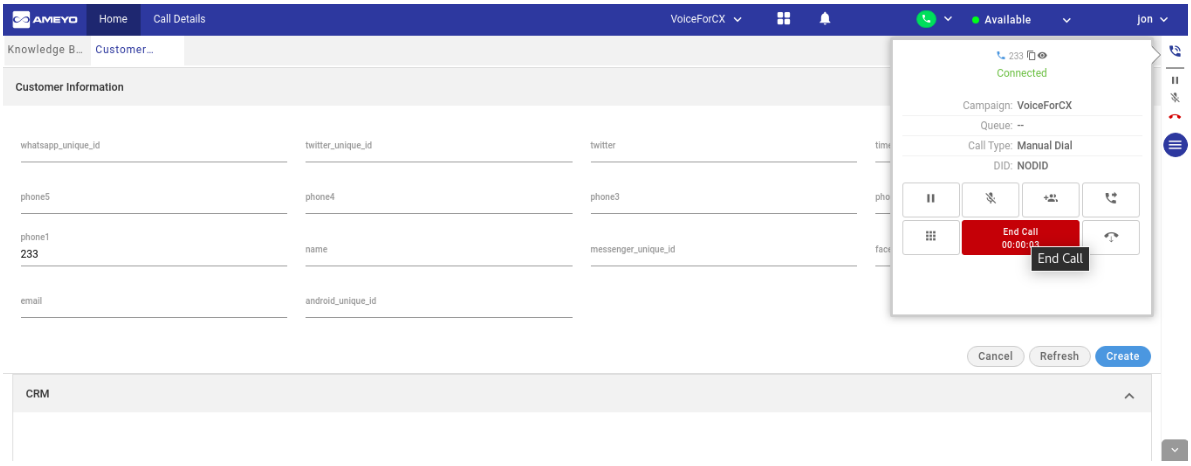


Figure: Caller ID showing for Outbound Calls at Telephony Panel

10.4.4.4 Make a Manual Dial Call

All the functionalities of Outbound calling for Manual Dial for supervisor and group manager are similar as that of agent.

Perform the following steps to make a manual dial call.

1. In order to make a manual dial call, the agent has to click button, a small pop-up slides to left at the top right corner.

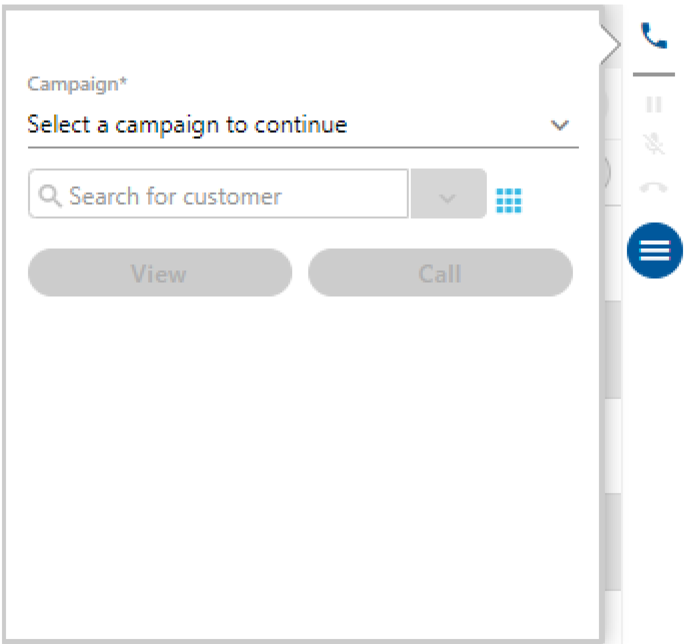


Figure: Manual Dial

2. If there are more than one campaign that supports the outbound calls, then agent has to select one the campaign first from which the call has to be made.

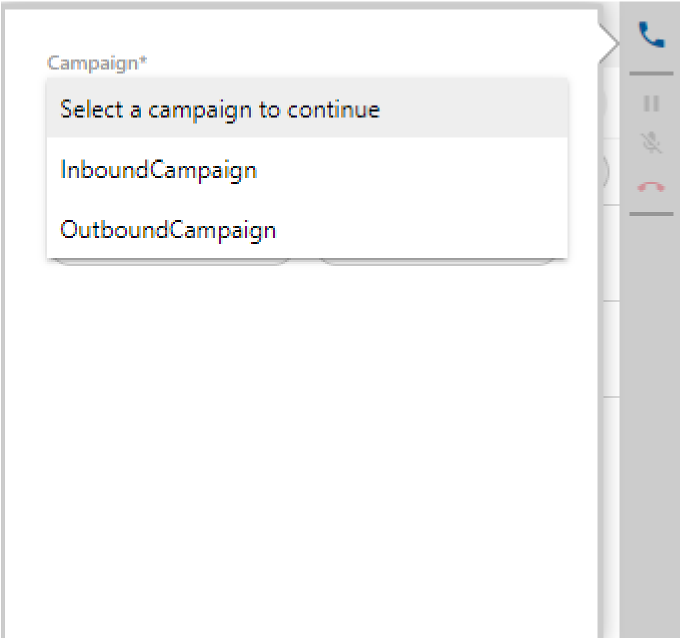


Figure: Campaign Selection

3. After selection of campaign, click icon to show the numeric keypad.

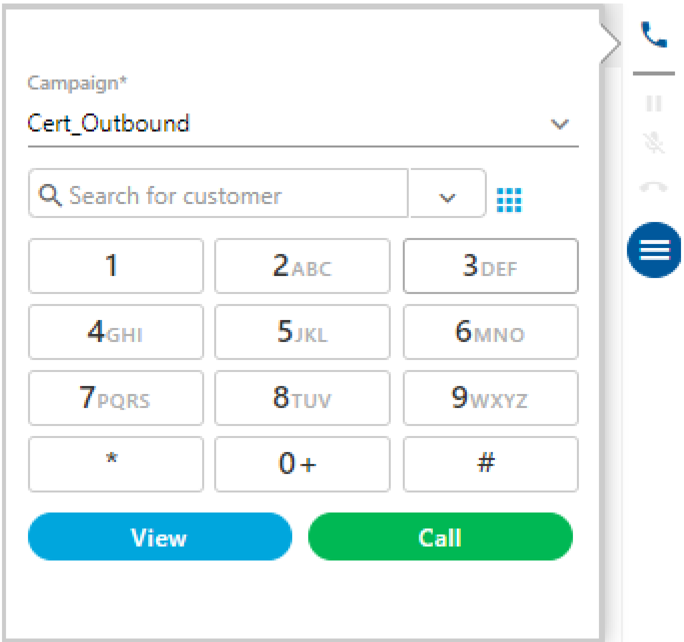


Figure: Numeric Keypad

4. The agent can either type the number through keyboard or use this numeric keypad to punch the number.
5. After entering the number, the agent can click "Call" button to dial it.
6. If the number is registered, the customer information is displayed on the screen instantly.
7. If the number is not registered in the system, the following pop-up is displayed on the screen.

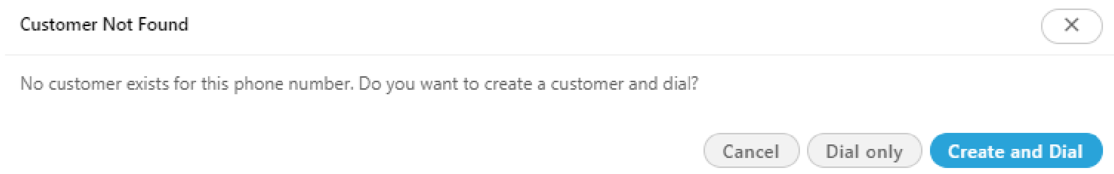


Figure: Calling Manually to a New Number

It contains the following two options.

- **Create and Dial:** Click it to create the customer first in the system and then dial the number.

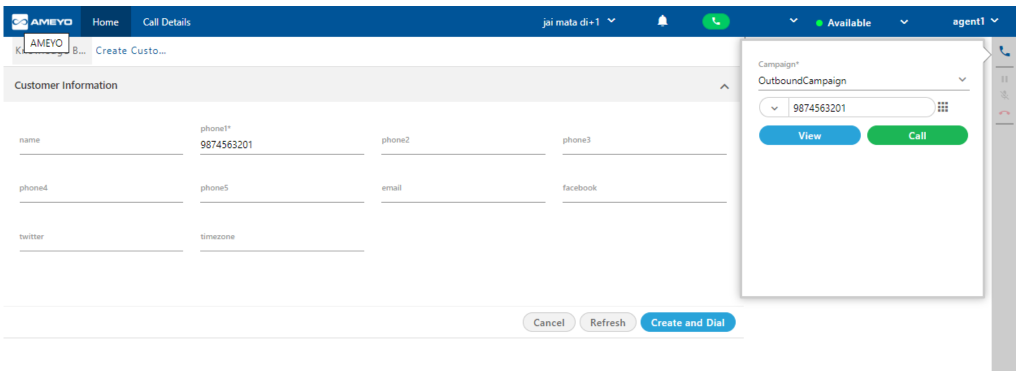


Figure: Create and Dial

Here, you have to provide the following inputs.

- Name
- Phone 2
- Phone 3

- Phone 4
- Phone 5
- Timezone
- Twitter
- Facebook
- Email

After providing the inputs, click "Create and Dial" to save the customer details and dial the number. Before dialing, you have to select the campaign again.

- **Dial Only:** Click "Dial Only" to dial the call straightaway without saving the number with a new customer.

8. The call is connected and the dialer starts to dial the customer's number.

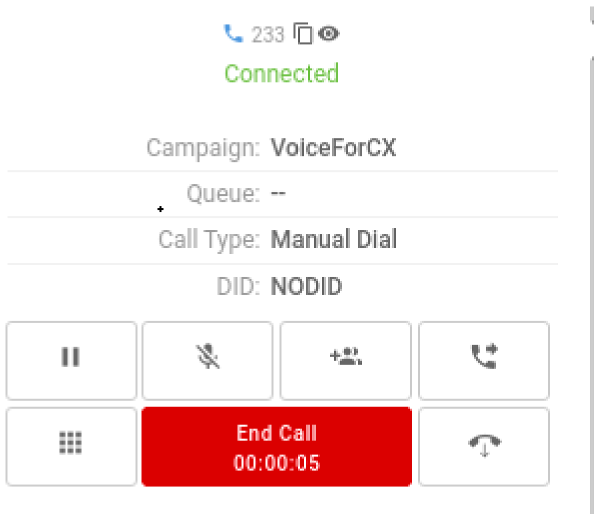


Figure: Calling a Customer

9. Once the customer answers the call, the agent can talk to the customer.

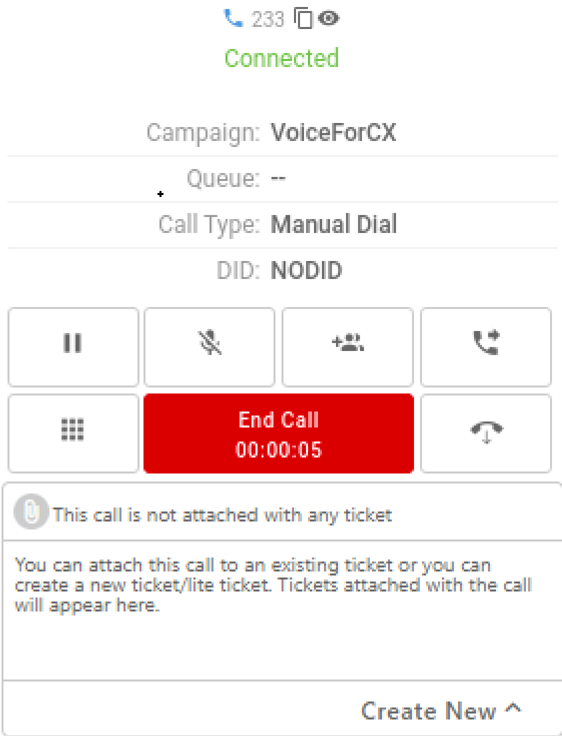


Figure: Ongoing Outbound Call

Now, the Keypad will be replaced with the call control functions. Know more...

10. The agent can add the notes during or after the call. Know more...
11. After the call the agent can dispose the call. Know more...

In case of manual dial, the agent can create the customers, if they are not exist in the system.

It is not recommended to dial the call without creating the customer.

10.4.4.5 Preview Manual Dialing

All the functionalities of Outbound calling for Preview Manual Dial for supervisor and group manager are similar as that of agent.

Preview Manual Dialing enables the agents to first view the available information about the customer and provides a timeframe before dialing the customer. In this time-frame, the agent can also click "Call" to call the customer.

Perform the following steps to make a Manual Preview Dial call.

1. Click  button, a small pop-up slides to left at the top right corner.

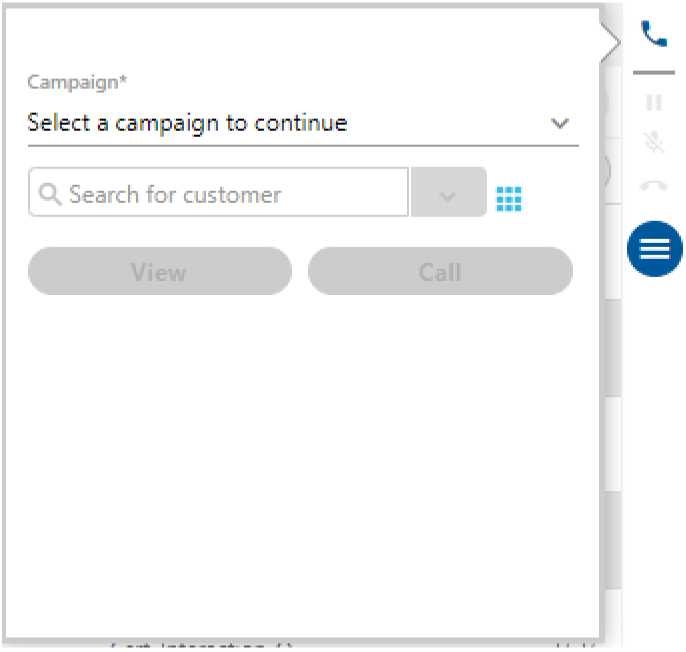


Figure: Manual Dial

2. If there are more than one campaign that supports the outbound calls, then agent has to select one the campaign first from which the call has to be made.

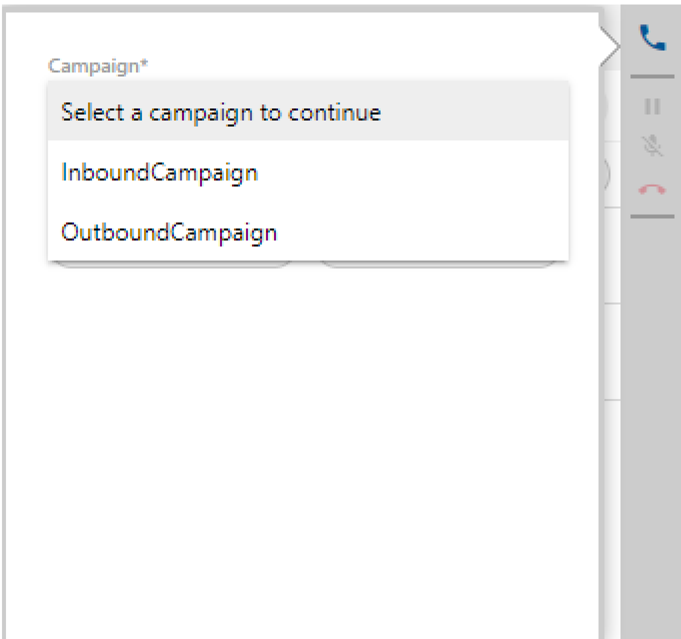


Figure: Campaign Selection

3. Click icon to show the numeric keypad.

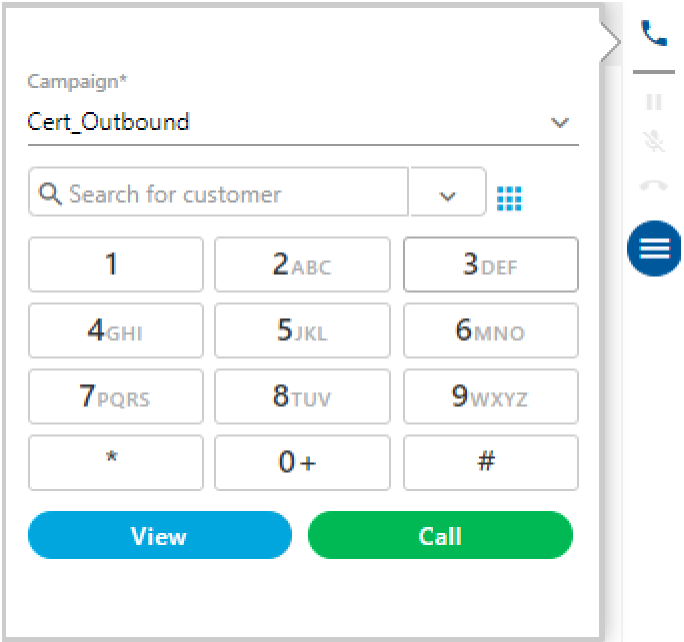


Figure: Numeric Keypad

4. The agent can either type the number through keyboard or this numeric keypad to punch the number.
5. After entering the number, click button to view its information.
6. If the number is not registered in the system, an error message is displayed.

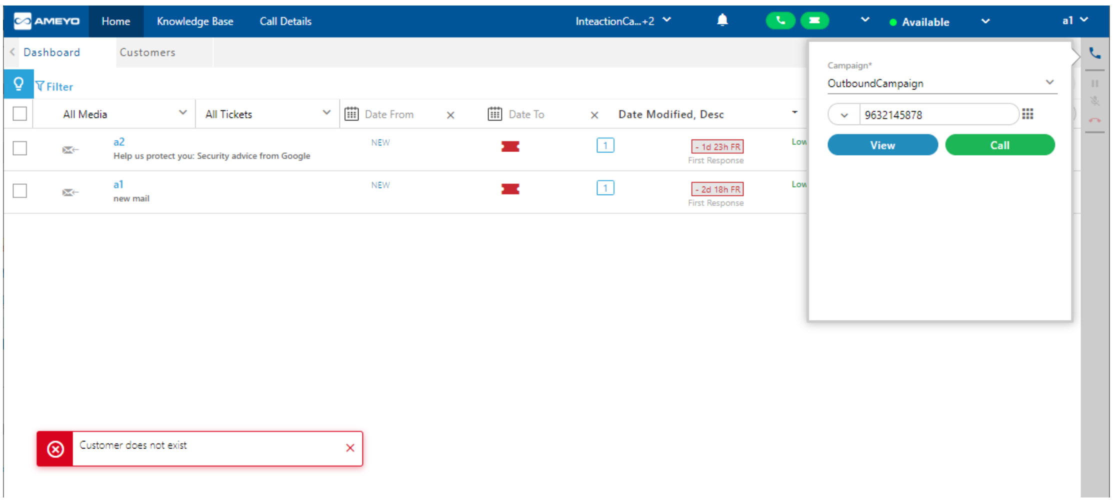


Figure: Customer Does not Exist

In such a case, you can click "Call" button that provides you the options - "Create and Dial" and "Dial Only."

7. If the customer is available, its information is displayed on the screen. The timer runs that shows after how much time the call will be connected to the customer.

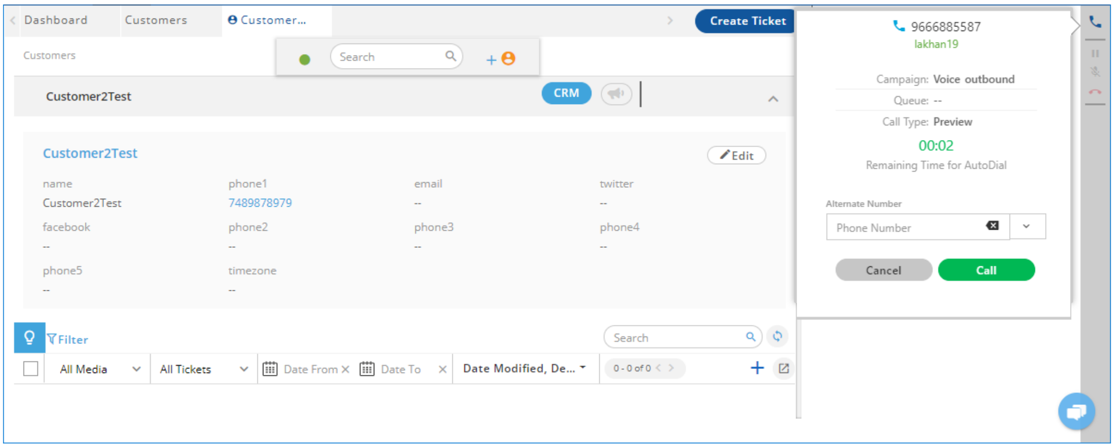


Figure: Showing the Customer

If there is another number of the customer, then the agent can provide that number in the alternate number textbox of the telephony panel.

8. The agent can either wait for the auto dialer to connect the call or click "Call" manually. The call is connected and the dialer starts to dial the customer's number.

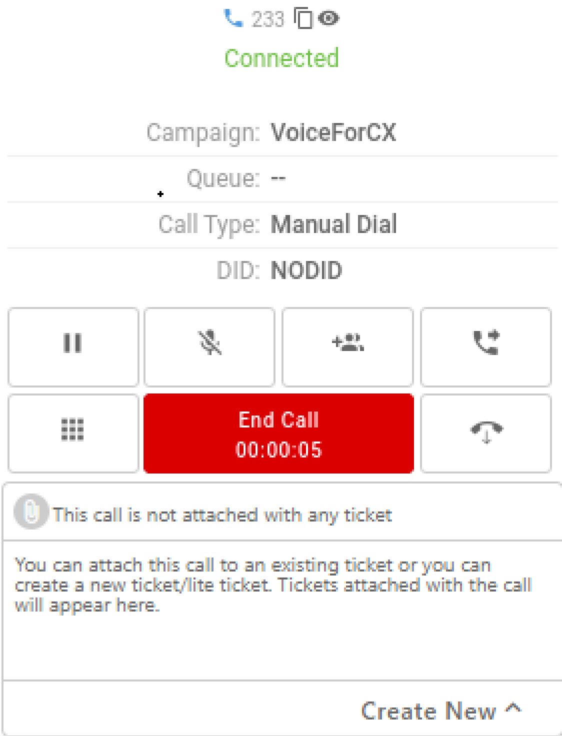


Figure: Calling a Customer

Now, the Keypad will be replaced with the call control functions. Know more...

9. The agent can add the notes during or after the call. Know more...
10. After the call the agent can dispose the call. Know more...

10.4.4.5.1 Added the Animation and Red Color to Call Duration Timer

After a specified duration, the timer of Call Duration will be displayed with animation in red color. Refer to the following screenshot.

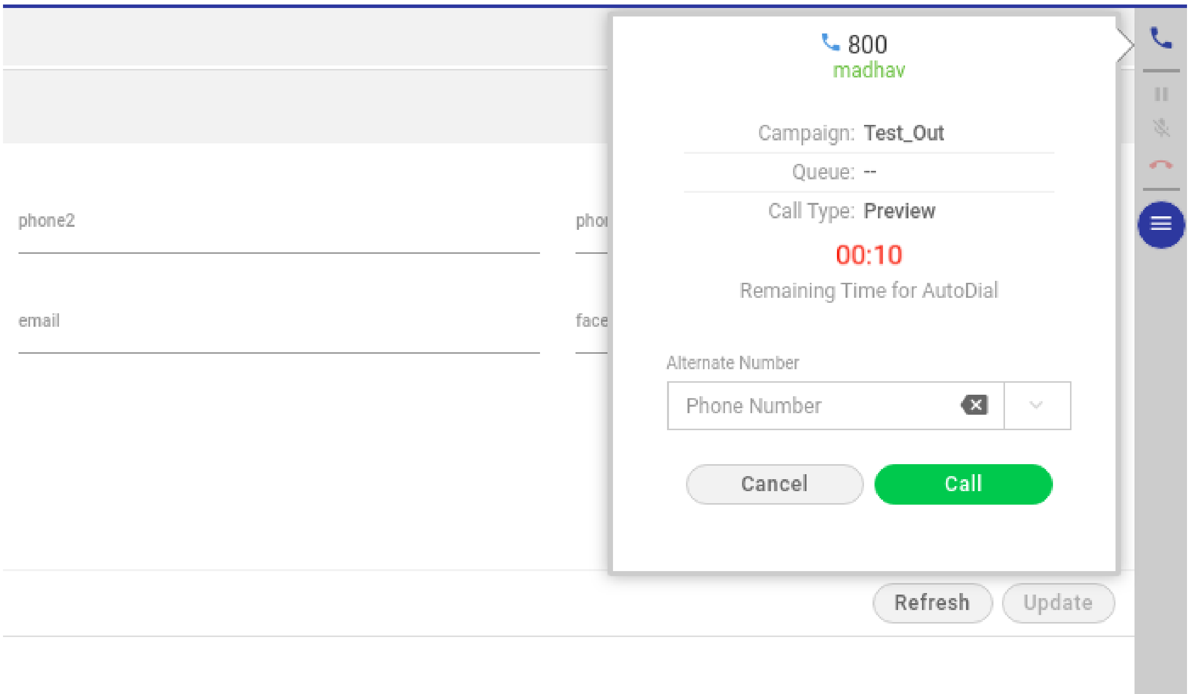


Figure: Updated Call Duration Timer

Warning time and color are not configurable. It can be configured in the code by the Developer as of now.

10.4.4.6 Auto Dial

All the functionalities of Outbound calling for Auto Dial for supervisor and group manager are similar as that of agent.

In case of Auto Dial, the dialer throws the call to the agents and the agent is asked to accept or reject the call.

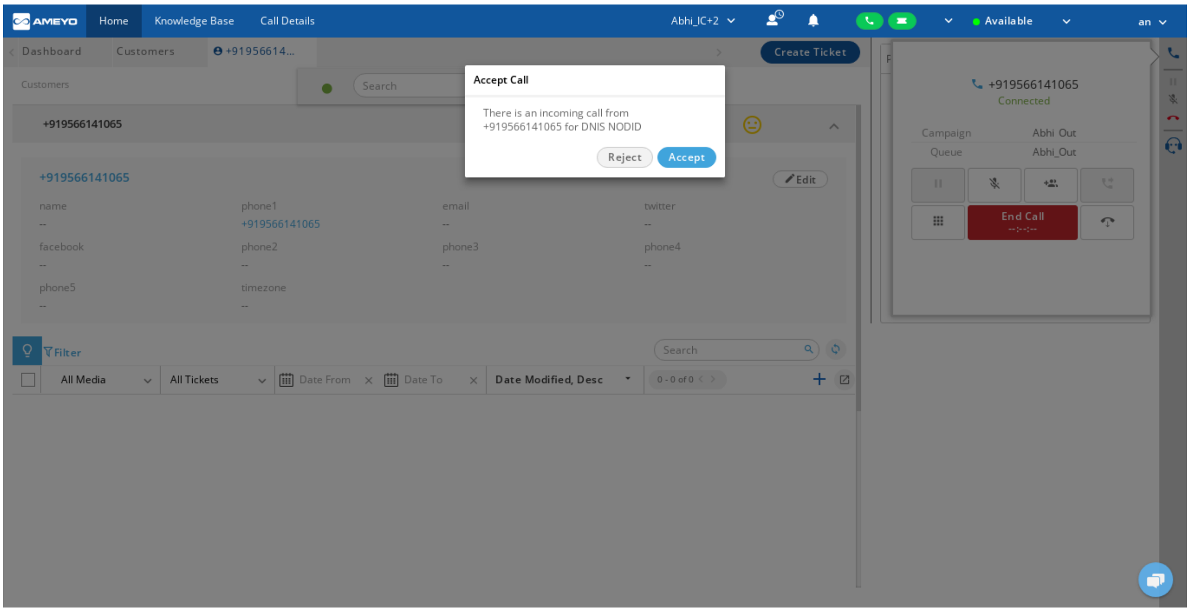


Figure: Outbound Call Sent by the Dialer.

Accept/Reject Pop-up will not available during manual operations.

As soon as the call is sent, the customer information is also displayed on the screen. If the customer is not registered already, the customer information fields will remain blank.

The agent has to perform the following steps here.

1. Click "Accept" to attend the call.

   However it is not recommended, still the agent can click "Reject" to reject the call.

2. The call is connected. In case of "Progressive Dialing", the agent has to wait until the customer is connected. However in case of "Preview Dialing", the customer is already connected with the dialer and then the call is given to the agent, so the agent can start talking with the customer.

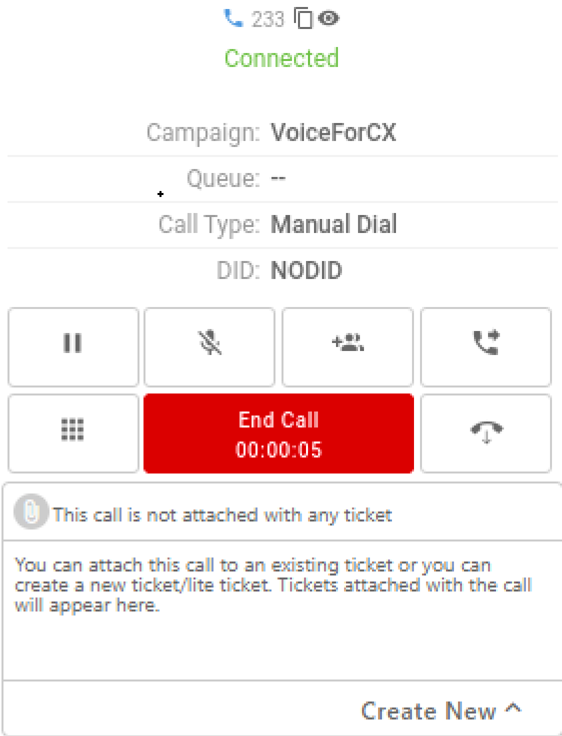


Figure: Calling a Customer

In case of Auto-dial Outbound Call with Preview, the agent gets sometime (fixed by the administrator) to go through the customer information. After that time, the call is connected. The agent can also click "Call" button before that to connect with the customer.

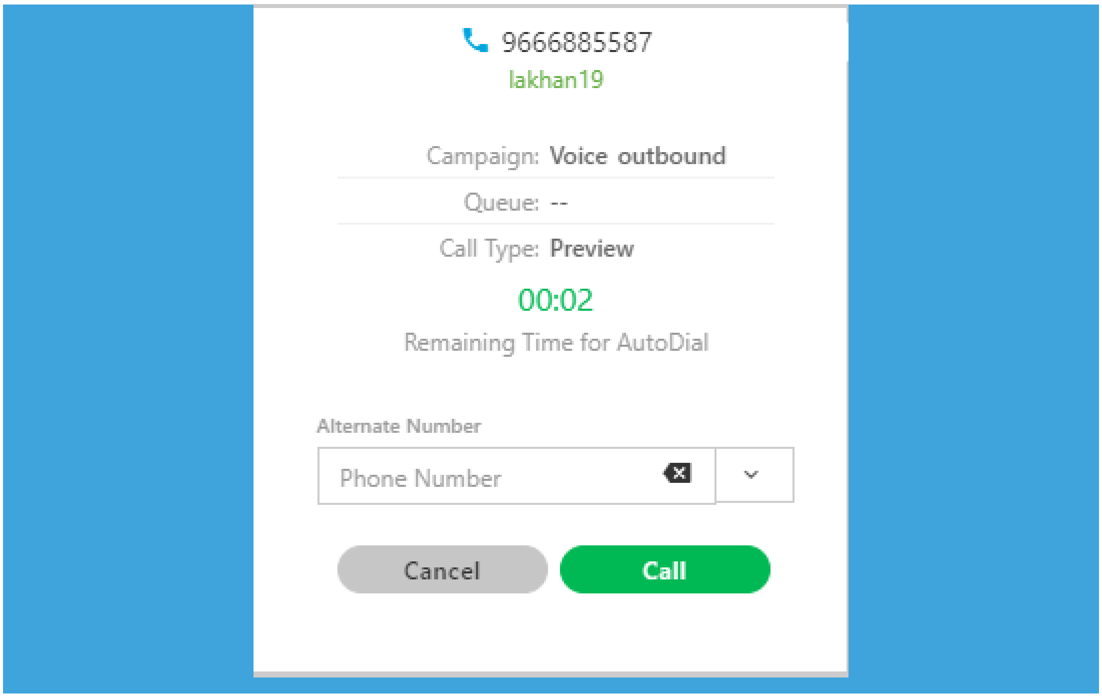


Figure: Preview Time

Now, the Keypad will be replaced with the call control functions. Know more...

3. The agent can add the notes during or after the call. Know more...
4. After the call the agent can dispose the call. Know more...

10.4.5 CTI Display, Functions, and Operations

All the functionalities and operations of CTI Display for supervisor and group manager are similar as that of agent.

10.4.5.1 Allowed Strings to be dialed

There are several cases when the agent has to search the customer through the customer's number, name or any other string which the agent has with it. With the entered characters the Ameyo will search the customer's information who has anything related to the entered string. And, the agent can also dial that entered string of characters which may cause the issues to the call servers. But Ameyo does not allow the dialer to dial that entered string. In such cases, if the entered number has alphabets, then the "Dial only" button will remain disabled and hence, the call will not be dialed. Know more...

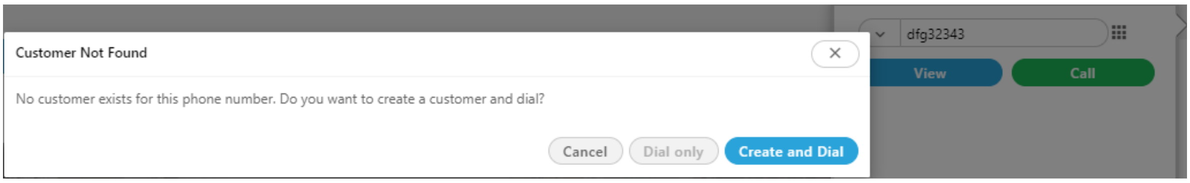


Figure: Disabled "Dial Only" button

There are two types of calls and the operations present in Ameyo.

1. **<u>Outbound Calls</u>:** The calls which are dialed to the customer by the Ameyo agent. Following are the CTI display available for outbound Calls.

10.4.5.2 Call to Unregistered Number

In the outbound call, if the customer is not found, then a modal is displayed to create the customer in Ameyo. In the displayed modal, there are two buttons to click from:

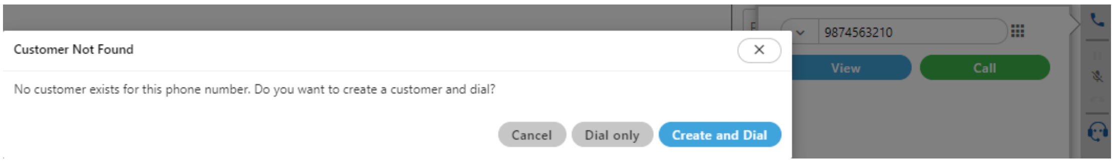


Figure: Calling Modal for Unregistered Number

There are some cases when the customer name remains blank in a customer record. For example, the Ameyo User is leaving the customer name blank while creating a new customer. In such cases, the Telephony Panel will display "UNKNOWN" during the call.

- **(Not Recommended) Dial Only:** If you click "Dial Only" button, then the call to the customer is dialed, but the customer is not created, which is not recommended. However, you can create the customer if you want at the end of the call. In this case, only the number of the customer will be displayed on the CTI display.

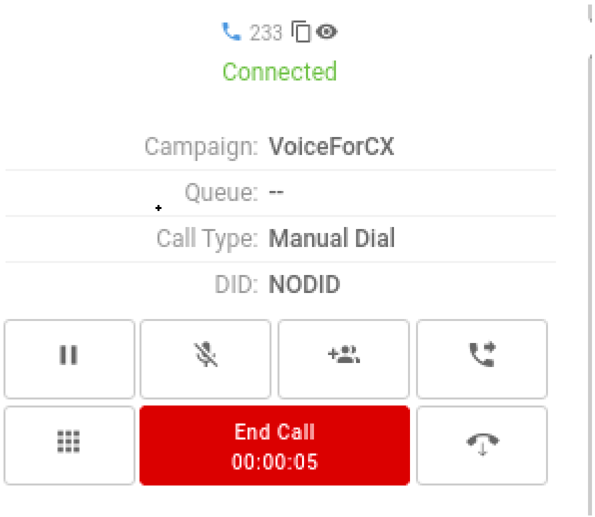


Figure: "Dial Only" the call

- **Create and Dial:** In Ameyo Telephony Panel, the agent can click the "Create and Dial" button which allows the agent to create the customer and then dial the call. The following screen comes up, where the agent can create the customer.

  [Information about Primary Phone Number from Telephony Panel]: If Ameyo User is providing a number in Ameyo Telephony Panel and clicks "Create and Dial", then that phone number will be added automatically in that primary-key marked phone number field (such as "phone1").

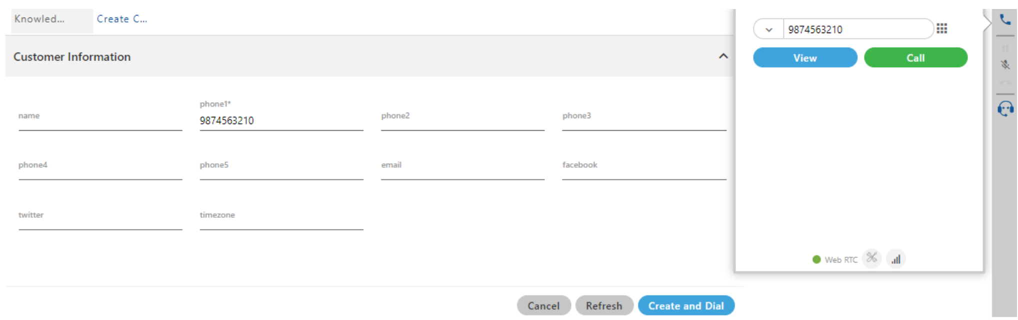


Figure: "Create and Dial" the call

Enter the details of the customer and click "Create and Dial" button.

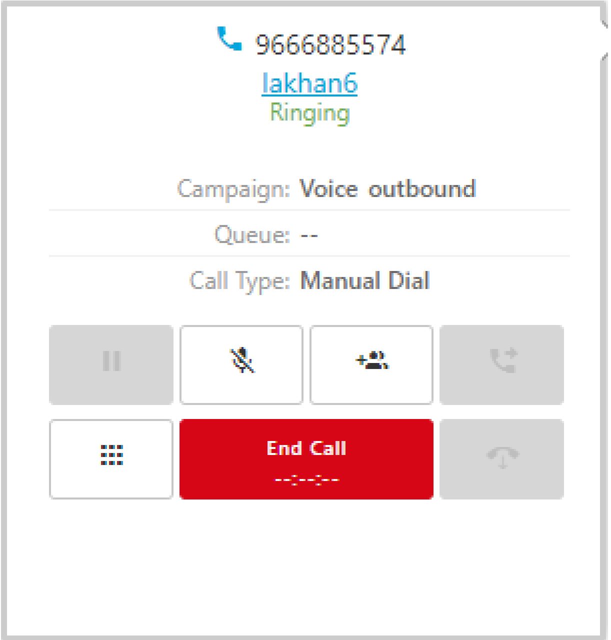


Figure: Calling the created Customer

2. **Inbound Calls:** The calls which are landed into the Ameyo or dialed by the customer to the agent of Ameyo. Following are the CTI display available for inbound Calls.

10.4.5.3 Call from the Phone Number of a Registered Customer

If the customer is found for any inbound call, then "Customer Detail" page for that customer is displayed with CTI.

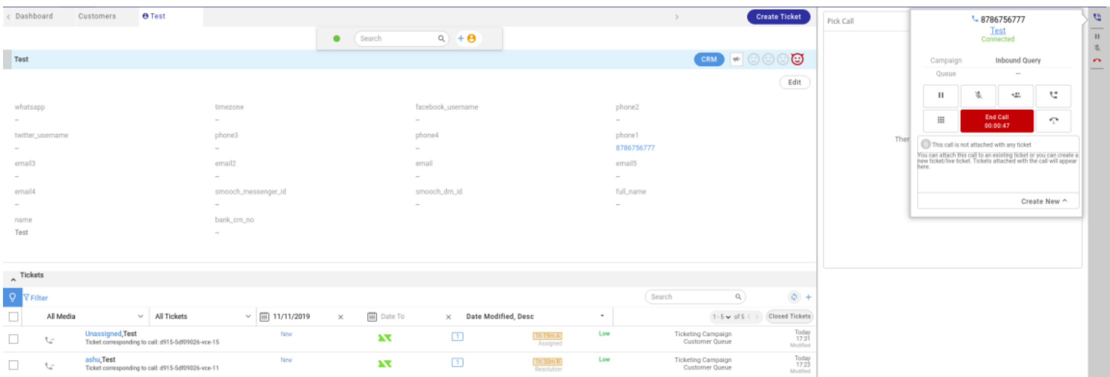


Figure: CTI pop-up from the Phone Number of a Registered Customer

10.4.5.4 Call from Unregistered Number

If the customer is not found for any inbound call, then CTI pop-up shows a blank Customer page. Here, the agent can register the details of the customer.

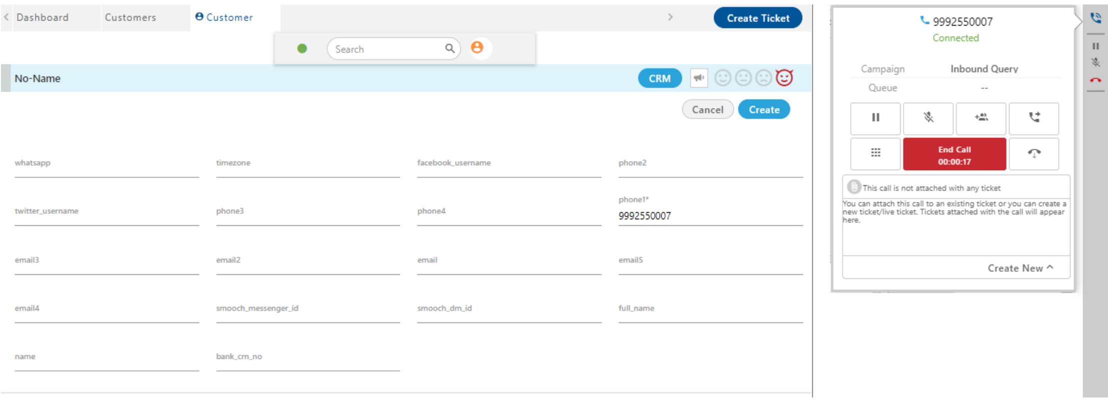


Figure: CTI pop-up for the new Customer

You can enter the details of the customer in the left panel of the CTI pop-up.

10.4.5.5 CTI Display for Multiple Customers with Same Number

In the case of Inbound Calls, the multiple customers having the same phone number (from which the call is being received) will be displayed in a pop-up. If the Ameyo CRM is not linked with Ameyo AppServer or if the customer is not registered in Ameyo CRM but in Ameyo System, then the "CustomerQuery" node will be used to resolve the customers.

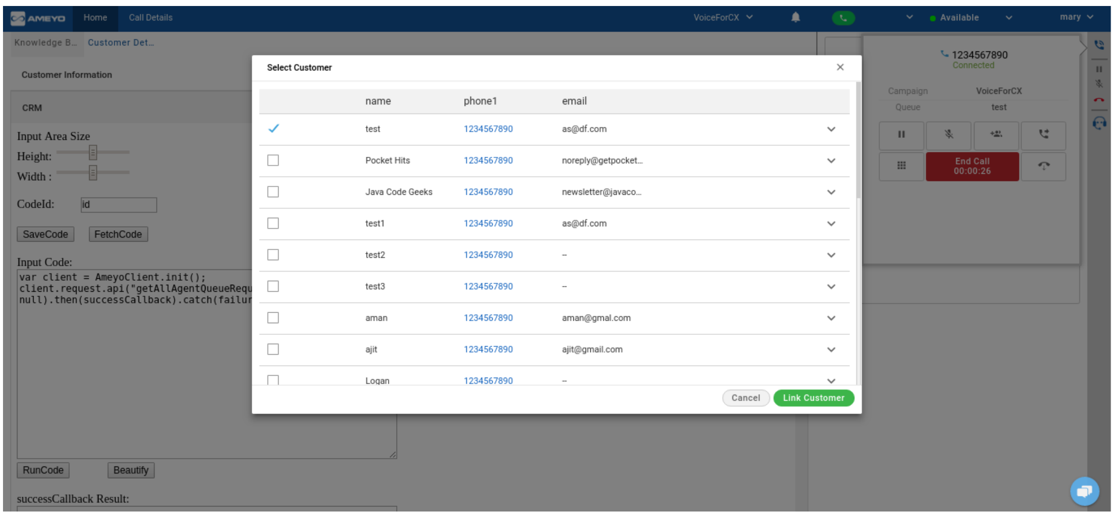


Figure: Displaying the list of Multiple Customers with the same number

Sequence to display the columns in "Multiple Customers Found" is defined through the customized Agent Table Definition of the campaign. If any phone field is not mapped in Table Mapping at System-level, then it will not be clickable and will come in the customer details. For example, you have to map "phone number 1" customer field with "phone1" Table Definition Field.

The agent can select any customer and click "Link Customer" to link this call with the selected customer.

10.4.5.6 Call Failure

There are certain cases when due to some issues, the call could not be connected. It may occur due to any of the failure reason like either customer call leg is not connected, or Agent call leg is not connected. If the customer call leg does not gets connect, there may be the provider related issues or its due to the certain general reasons which are notified to the agents by Ameyo. And, if the customer call leg does not get connect then the reason for that call failure is listed on the notification panel of the Ameyo in the notification bar. This helps the agent to know what the problem regarding the call was.

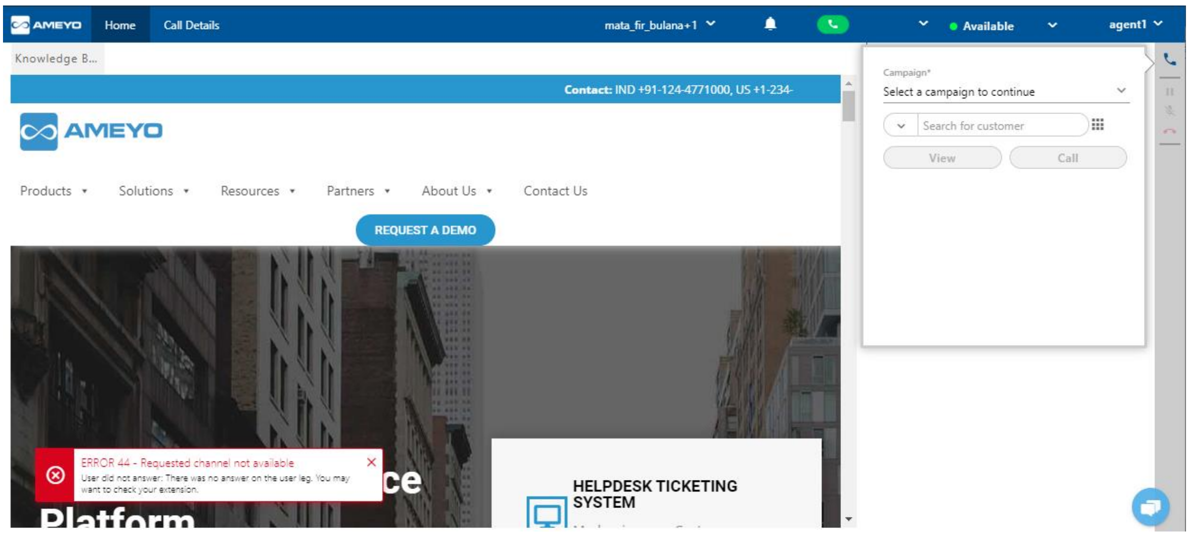


Figure: Call Failure Reason Notification

All the notifications are also sent to the supervisors and the administrators also.

10.4.5.7 Number Masking

If number masking is enabled in any voice campaign, then the customer name and the number in masking format is displayed on the telephony panel to the agent.

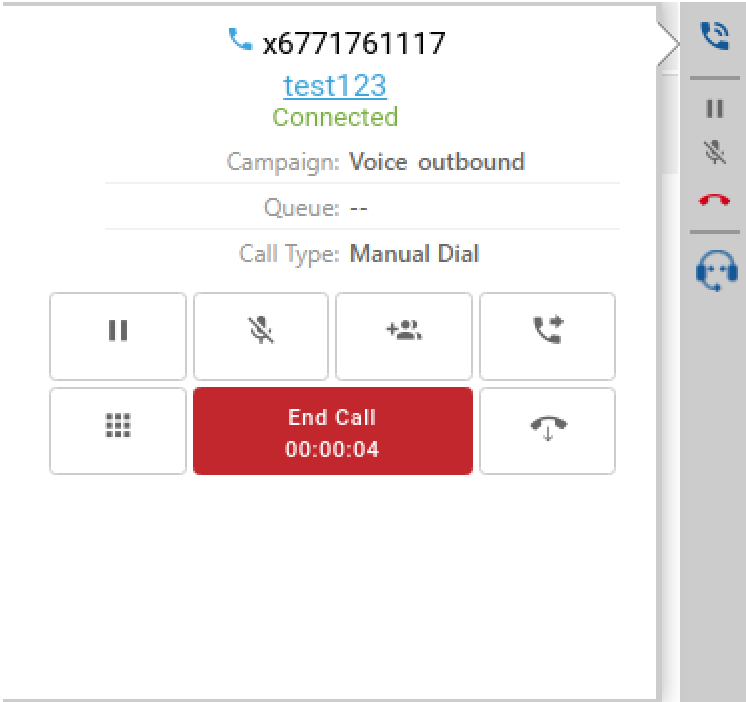


Figure: Masked Number

10.4.5.8 Option to Disable the Disposition on Active Call

There can be some cases where the call's pre-selected disposition may not be valid at the end of the call. So, if the agent is allowed to dispose of the active call before disconnection, then the selected disposition can be wrong. Therefore, some businesses want the option to disable the agents to dispose of an active call. To meet this requirement, the option to disable the disposition of Active Call is introduced in Ameyo 4.11 through a Configurable Feature.

By default, this option is disabled, allowing those businesses to have the normal workflow that still wants to allow the agents to dispose of an active call before disconnection.

- It is applicable for both single-level and two-level dispositions.
- If the disposition of an active call is disabled and the agent tries to dispose of an active call, then an error message is displayed.

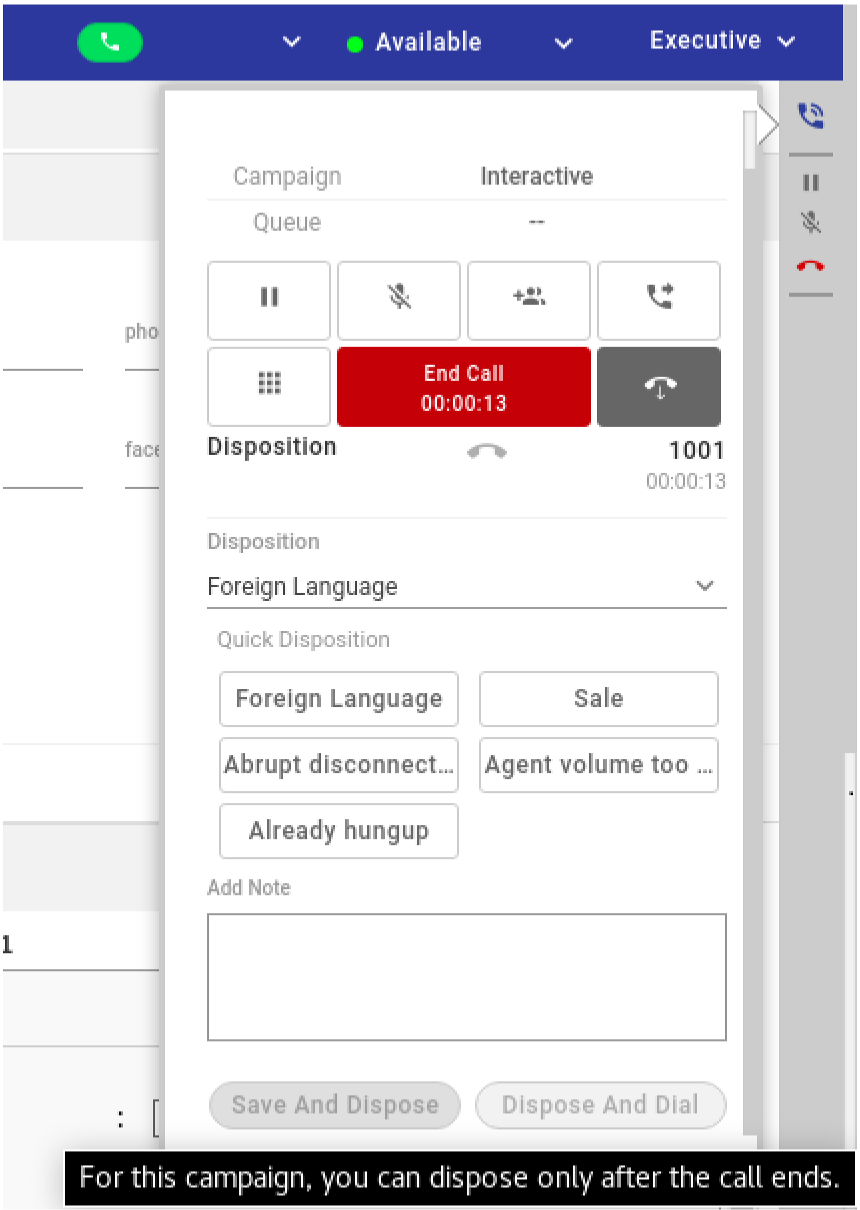


Figure: Error when the user tries to dispose of an active call

- Even if the agent is scheduling a Callback, still, the agent cannot dispose of an active call.

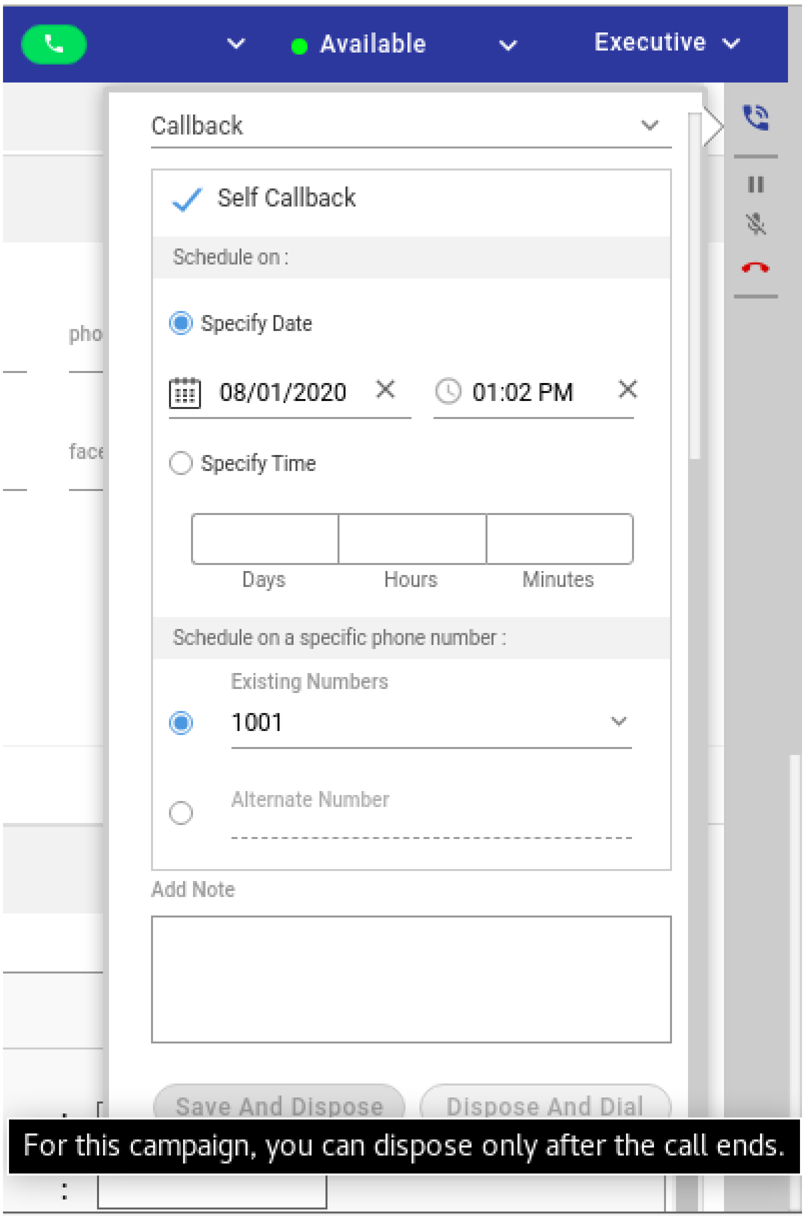


Figure: Error when the user tries to schedule the callback on an active call

10.4.6 Call Control Functions

10.4.6.1 Call Control Functions

All the functionalities of Call Control Functions for supervisor and group manager are similar as that of agent.

As soon as a call is placed, telephony panel will pop up containing telephony buttons which are used for call control.

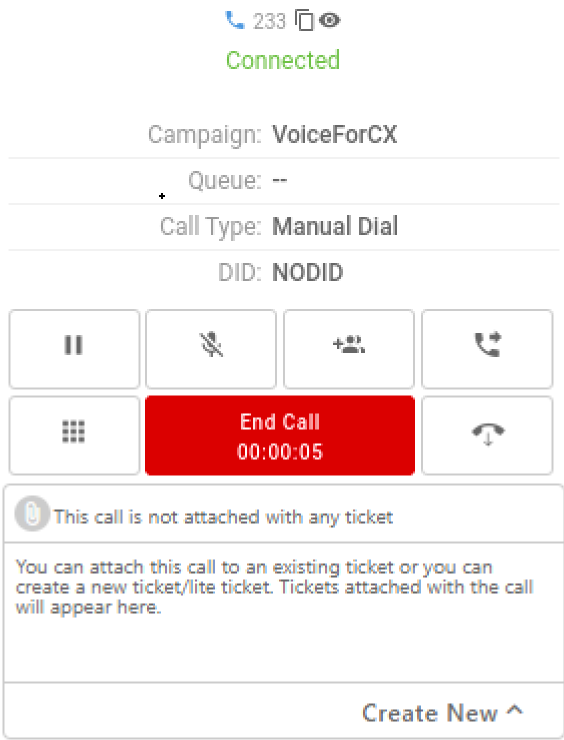
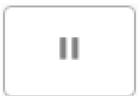


Figure: Call Screen

10.4.6.1.1 Attach Tickets to Call

The User can create and attach the tickets during the call in Telephony Panel. Know more...

10.4.6.1.2 Call Hold/Talk

While on live calls, the agent can put the customer call on hold by clicking  button. When a call is on hold, both parties will not be able to hear each other. Only music will be played to the caller and the total time for which the call is on hold is displayed on the panel.

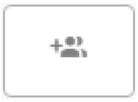
The agent can unhold(resume) the call by clicking  button.

10.4.6.1.3 Call Mute

On the live calls, the agent can put the customer's call on mute by clicking  button. When the call is on mute, then customer is not able to hear the voice of agent, but agent can hear all the voices of customer.

The agent can resume the muted call by clicking the same button again.

10.4.6.1.4 Conference

Call Conferencing allows to add guests to a call. A guest can be another agent, a field executive, a manager or a Supervisor. If you would like to add one or more guests to the call for a conference call, click  button with the caller on line.

10.4.6.1.4.1 (Licensable) Confer a Call to a User or Supervisor

If the agent wishes to make a conference call to another user or supervisor, the agent may take the user or supervisor over conference call by using this confer option. If you want to see the complete list of the users, then ask about the same from your administrator, as this feature is licensable.

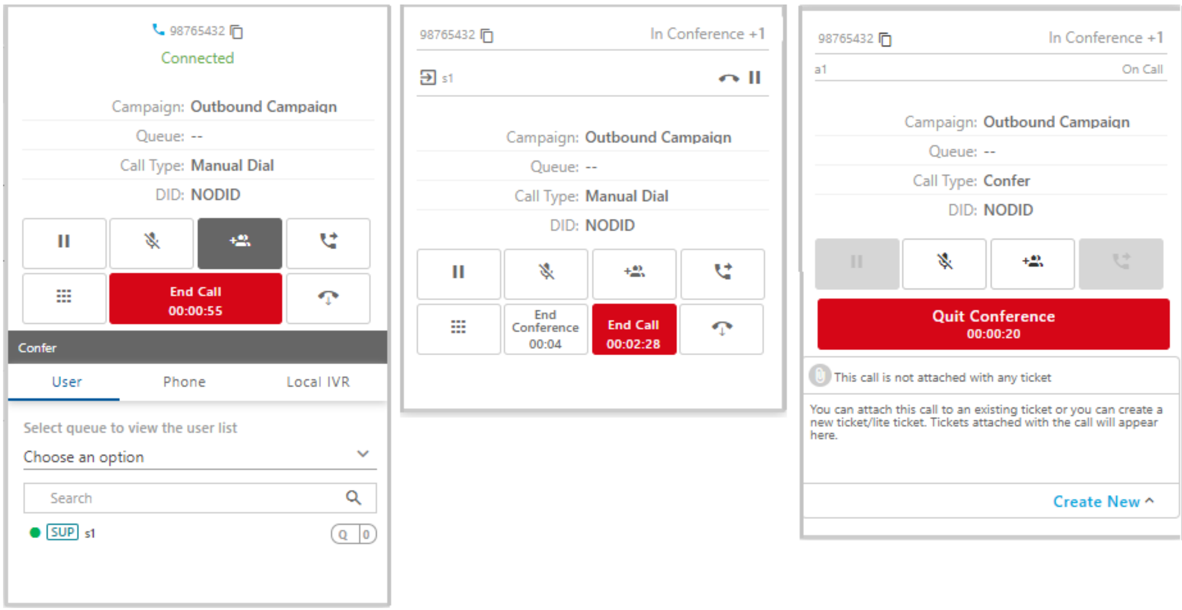
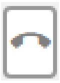


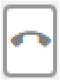
Figure: Call Conferencing with User

1. Only the names of the logged in users will reflect, who are available to take the calls with their User role. The user role will be seen only for the supervisors.
2. Put the customer call on hold by clicking **"HOLD"** button and click **"CONFER"** button.
3. Agent can select the name of the person with whom he/she wants to confer a call from the "user" list. During this process, the customer call would be on hold.
4. Agent can unhold the customer by clicking **"UNHOLD"** button and it will be a three-way conference call with new agent and the caller.
5. The agent can disconnect conference call by clicking **"End Conference"** button.
6. The agent can give the ownership to the other user while on the conference call by clicking  button. The primary agent can come out of the call by disposing the call.
7. The primary agent can remove the added user from the conference call by clicking  button.
8. The conference button also shows the total duration of the call for which the call has been on conference.

10.4.6.1.4.2 Confer a Call to an External Number

The agent can do a conference call with the external customer by entering the telephone number on the dialing pad.

1. Agent will put the customer call on hold by clicking **"HOLD"** button and click **"CONFER"** button.
2. Enter the phone number to transfer the call to in the box labeled **"PHONE"**. After entering the phone number, click **"Confer To Phone"** button.
3. Once the call gets connected, agent can explain the use case to the new user. During this process, customer call is on hold.
4. Agent can unhold the customer by clicking **"UNHOLD"** button and it will be a three-way conference call with new user and the caller.
5. The agent can disconnect conference call by clicking **"End Conference"** button.

6. The primary agent can remove the added user from the conference call by clicking  button.

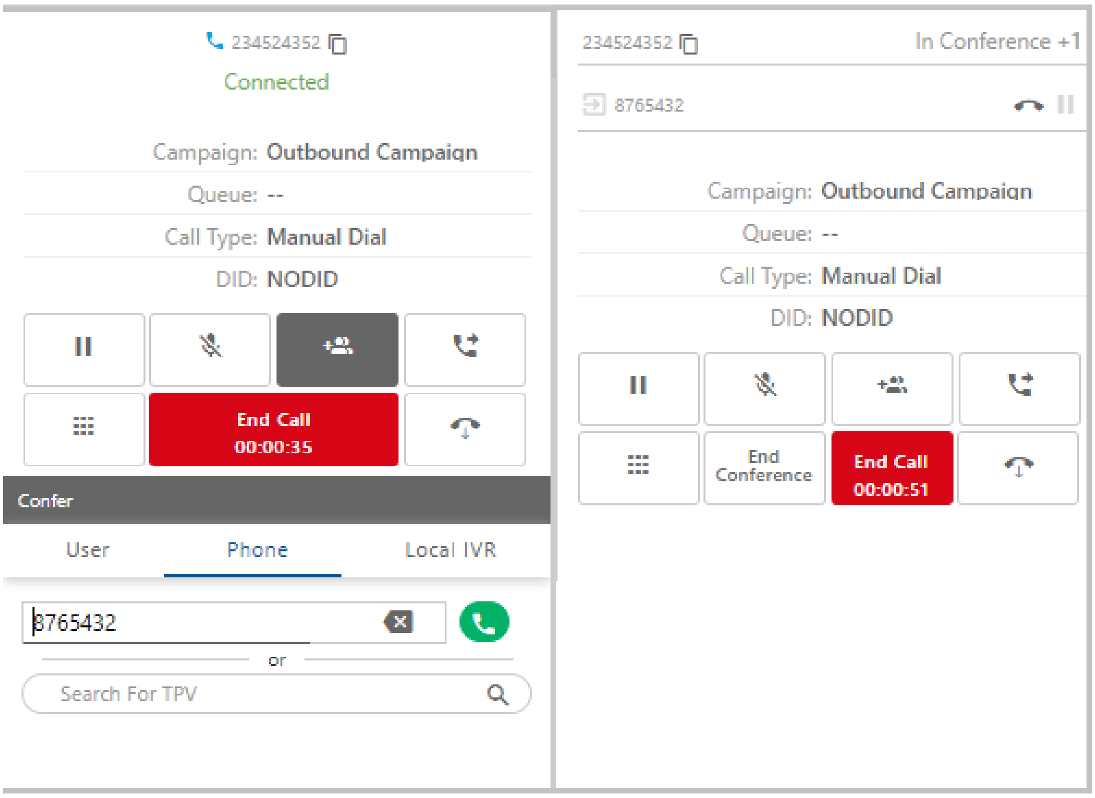


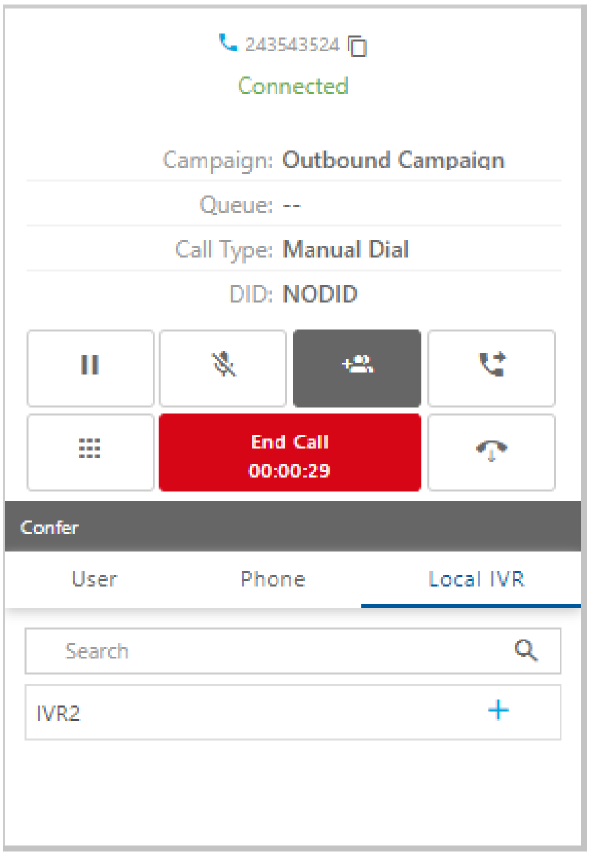
Figure: Call Conferencing with External Number

10.4.6.1.4.3 Confer a Call to IVR

If agent wants to facilitate any payment over IVR or to capture customer's feedback, then he/she can take the call to local IVR in conference.

1. Agent will put the customer call on hold by clicking **"HOLD"** button and click **"CONFER"** button.
2. Agent needs to select the local IVR from the drop-down menu and click **"Confer with local IVR"** button.
3. Both customer and agent will be in conference with local IVR and both the parties will be able to hear the prompts of IVR (as per configured IVR flow).

4. Customer can enter the required inputs on IVR as per agent instruction or IVR prompts.



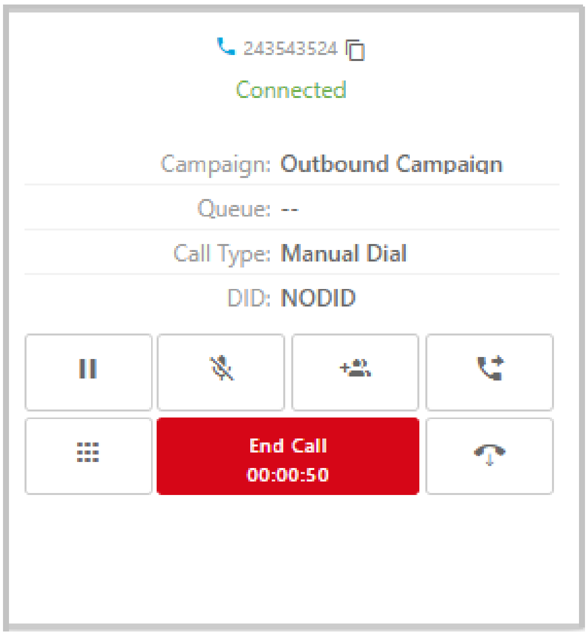


Figure: Call Conferencing with Local IVR

The agent cannot transfer the call to the IVR; however the call can be conferenced to the IVR by agent.

10.4.6.1.5 Call Transfer

If an agent wants to transfer a call, then he/she needs to click on the (TRANSFER) button. The agent will be able to select from the multiple options for call transfer.

1. Transfer to User
2. Transfer to Phone
3. Transfer to IVR
4. Transfer to Campaign
5. Transfer to Queue

10.4.6.1.5.1 (Licensable) Transfer a call to User or Supervisor (Warm Transfer)

A warm transfer is when agent will transfer the customer call to another agent or supervisor by giving him/her some background information about the caller. If you want to see the complete list of the users, then ask about the same from your administrator, as this feature is licensable.

For transferring the call to external user follow the below steps:

1. Only the names of the logged in users will reflect, who are available to take the calls.
2. Agent will put the customer call on hold by clicking on **"HOLD"** button and then click on **"TRANSFER"** button. However, the agent can directly transfer the call without making the customer on hold, but it is not recommended to do so.
3. Agent can choose anyone of the user from the available list. While transferring the call, the agent can see the user role of the supervisor, so that the supervisor can be easily recognized by the agent. Once call is connected to new user, agent can give the customer details (required information) to the new user. During this process, customer call is on hold.
4. New user will unhold the call by clicking on the “UNHOLD” button and it will be a three-way conference call with new user, the caller and agent himself.
5. Agent can hang up from the conference call by clicking on the “End Call” button. The caller will then be on call with the new user.

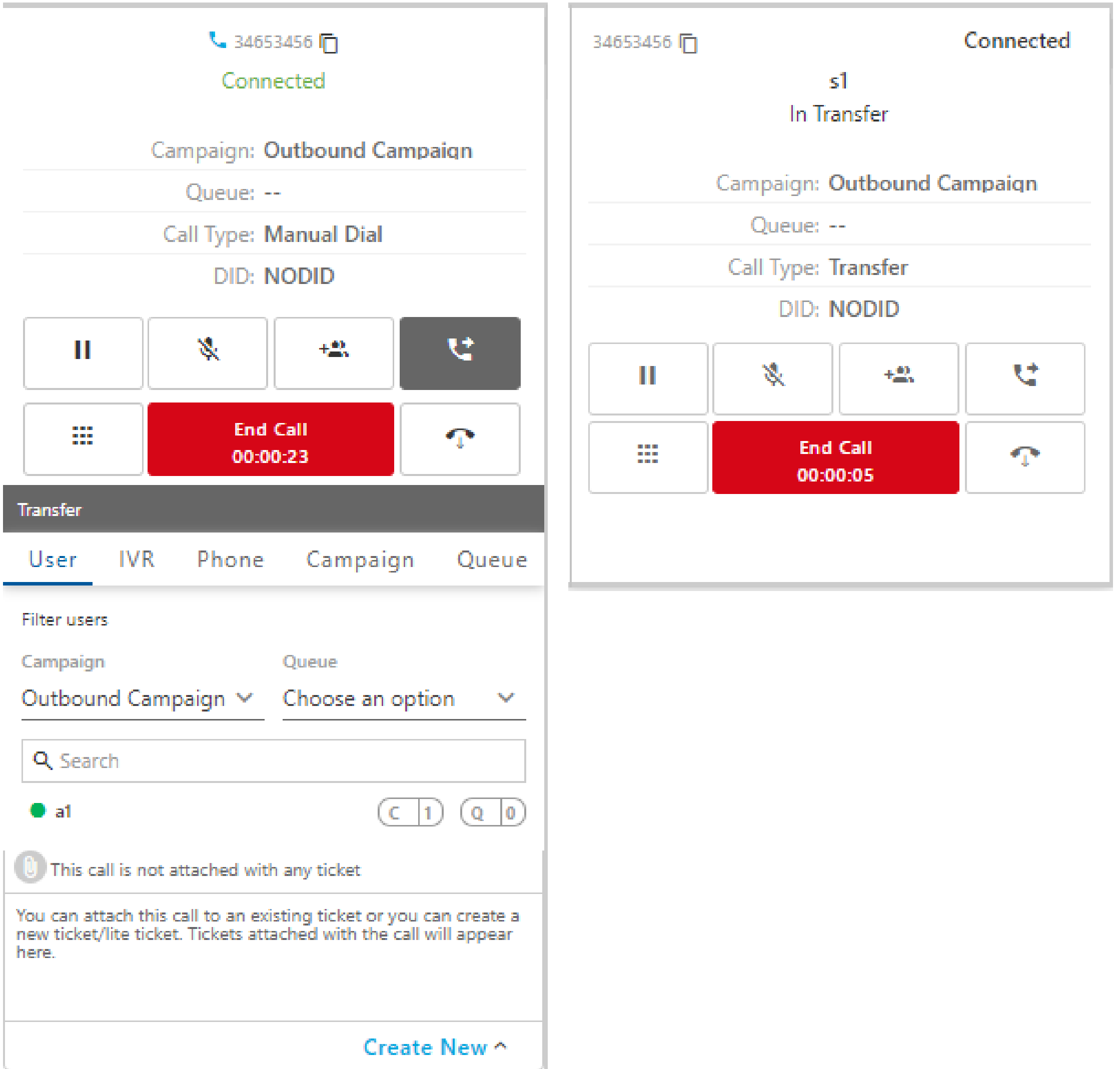


Figure: Call Transfer to User

Exceptional case:
When an agent performs "Transfer to User" for an outbound call and transfers it to another user, then the Call Type for such a call is not available in Live Monitoring tab. For example, agent 1 has received a call and then transferred it to agent 2. In this case, the customer will be reflecting with the agent 1 rather than the agent 2. The supervisor will see that the customer is connected with agent 1.

10.4.6.1.5.2 Transfer a call to external number (Warm Transfer)

A warm transfer is when agent will transfer the customer call to external number by giving him/her some background information about the caller. For transferring the call to external user follow the below steps:

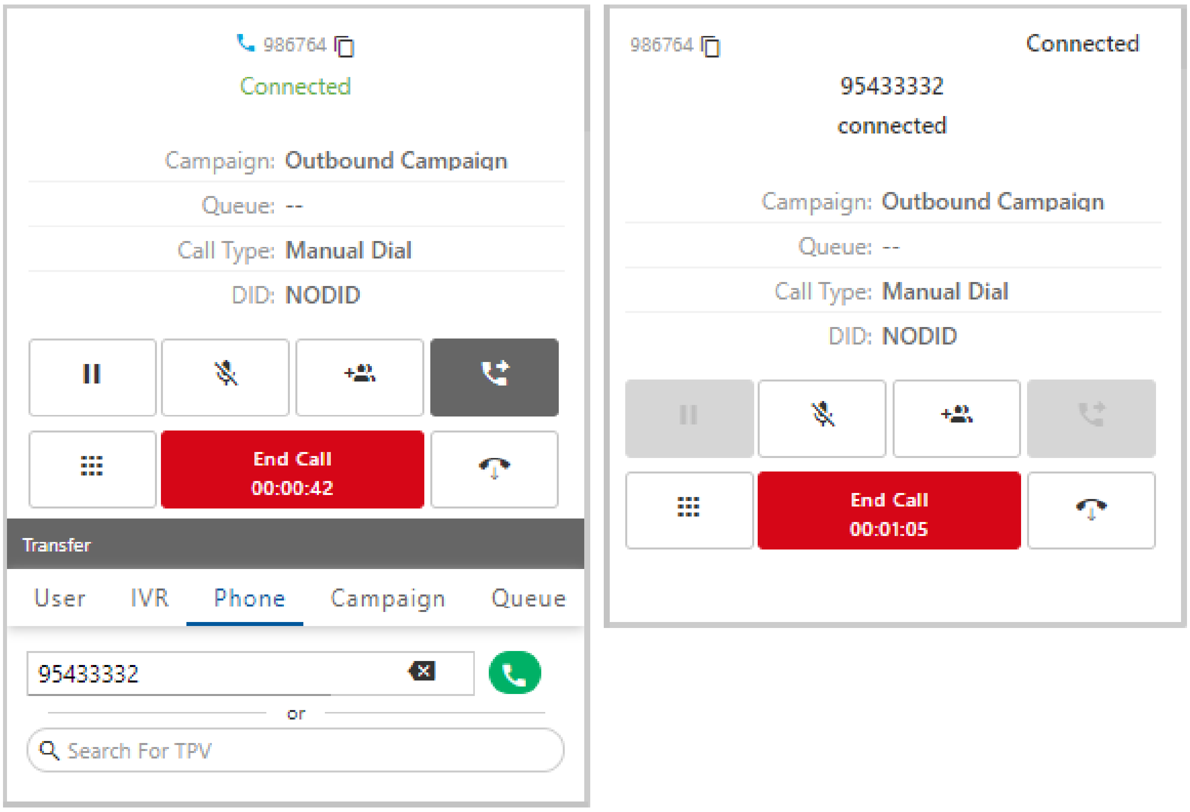


Figure: Call Transfer to External

1. Agent will put the customer call on hold by clicking on **"HOLD"** button and then click on "CONFER" button.
2. Enter the phone number to transfer the call to in the box labeled "PHONE". After entering the phone number, click the "Confer To Phone" button.
3. Once the call gets connected, agent can explain the use case to the external party. During this process, customer call is on hold.
4. External party will unhold the call by clicking on the "UNHOLD" button and now there will be a three-way conference call with new user, the caller and agent itself.

5. The agent can give the ownership to the external party while on the conference call by clicking button. The primary agent can come out of the call by disposing the call.
6. The primary agent can remove the external party from the conference call by clicking on button.

10.4.6.1.5.3 Transfer a Call to IVR

If agent wants to facilitate any payment over IVR or to capture customer's feedback, then he/she can take the call to IVR in the conference.

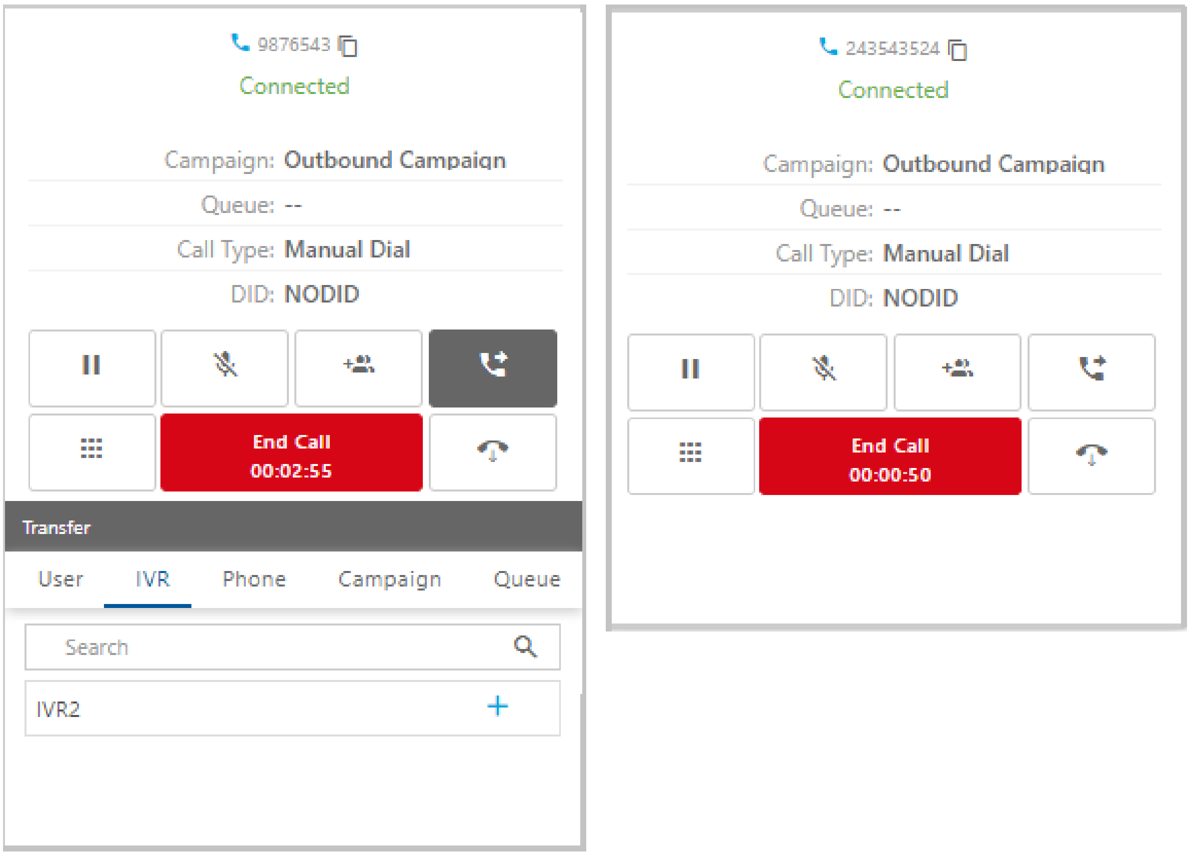


Figure: Call Transfer to IVR

1. The Agent will put the customer call on hold by clicking on **"HOLD"** button and then click on **"TRANSFER"** button.

2. The Agent needs to select the IVR from the drop down and call will be transferred to the selected IVR.
3. Customer can enter the required inputs on IVR as per IVR prompts.

10.4.6.1.5.4 Transfer a call to Campaign

There are cases when customer wants to talk regarding a particular concern for which there is a separate campaign, in that case agent can use transfer to “Campaign” option.

1. The Agent will put the customer call on hold by clicking on **"HOLD"** button and then click on **"TRANSFER"** button.
2. The Agent needs to select the “campaign” name from the dropdown list, after which the call will be transferred to any available agent in the selected campaign.

10.4.6.1.5.5 Transfer a call to another Queue (of same campaign)

This option can be used by agent if customer has by mistake selected the wrong queue in the IVR, for example IVR has queue of sales, support and general queries and customer called in for support however in error he/she selected sales queue in the IVR so, agent can re-route the call to correct queue by following below steps. This option is applicable for inbound campaigns only.

1. **"HOLD"** button and then click on **"TRANSFER"** button.
2. The Agent needs to select the queue name from the drop-down list and select the appropriate queue in which the call needs to be transferred.

If the supervisor has configured "ACW Timeout (in sec)" for Connected and Not Connected Calls, then the calls (after disconnection) will be disposed off automatically after the expiry of this timeout value. To avoid such scenario, and in general, we recommend to dispose of the disconnected calls within this duration.

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10.4.6.1.5.6 Transfer a Call to User of Another Campaign

There are cases, when the call of the customer is get connected in the wrong campaign. In this case, the agent may wants to transfer the call to a particular agent of another campaign. This feature is based upon the normal Warm transfer case, where the user1 who has transferred the call to the user2 present in another campaign will not disconnect from the call. Then user1 can provide the context to the new user "User2" about the call and query, in the meantime, the customer is on hold. The user1 has to perform the following steps to transfer the call to the new user.

1. Click "Transfer" button to transfer the call.
2. Select "User" to search for the user to whom the call has to be transferred.
3. Select the campaign name and queue name from the respective drop-down lists.
4. The new agent can be searched either with "User Name", or "User ID". Here, the count of campaigns and queues in which the user is assigned is also shown in front of the user's name.

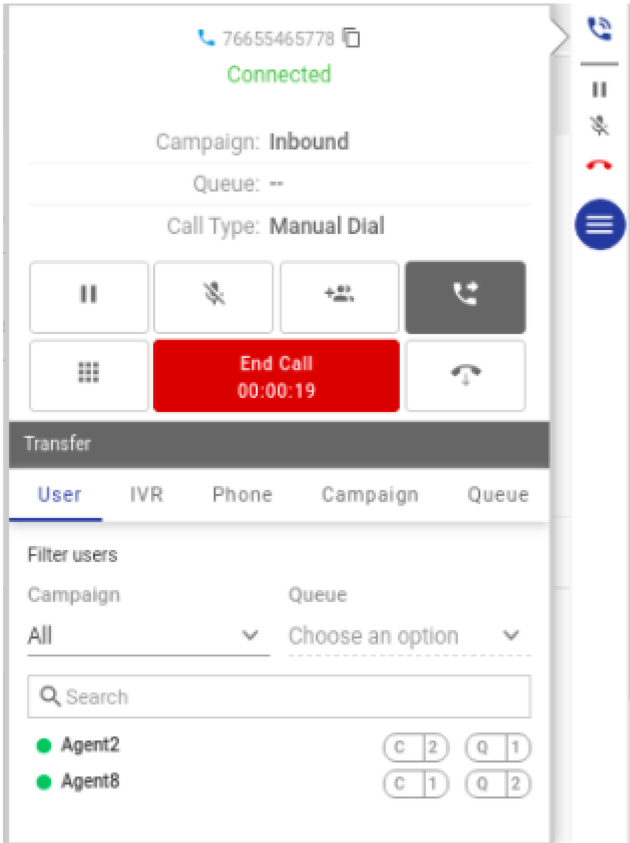


Figure: Searching the user for Transfer

5. A modal will be shown after selecting the agent, in which the list of all the campaigns is present. The agent can select in which campaign the call needs to be transferred.

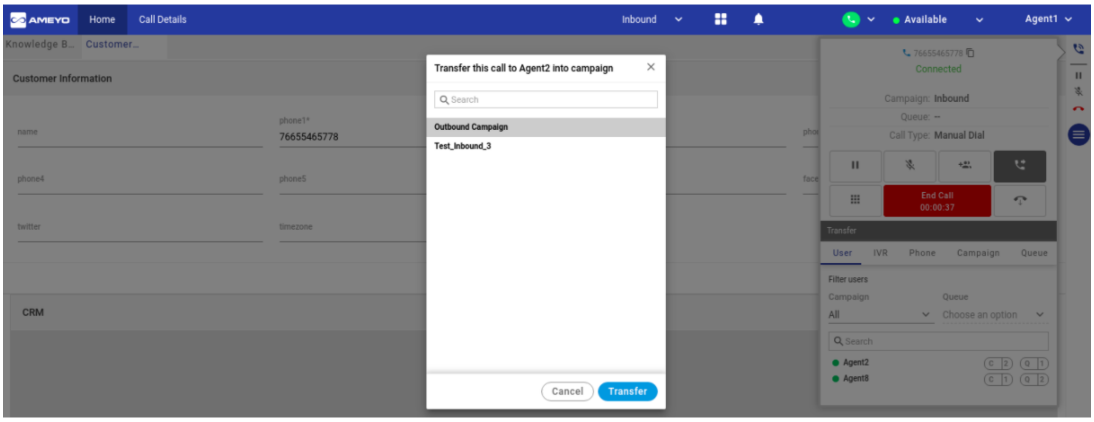


Figure: List of Campaigns and Queues in which the User is loggedin

6. Now, the agent can select and click "Transfer" button to transfer the call to the new user.

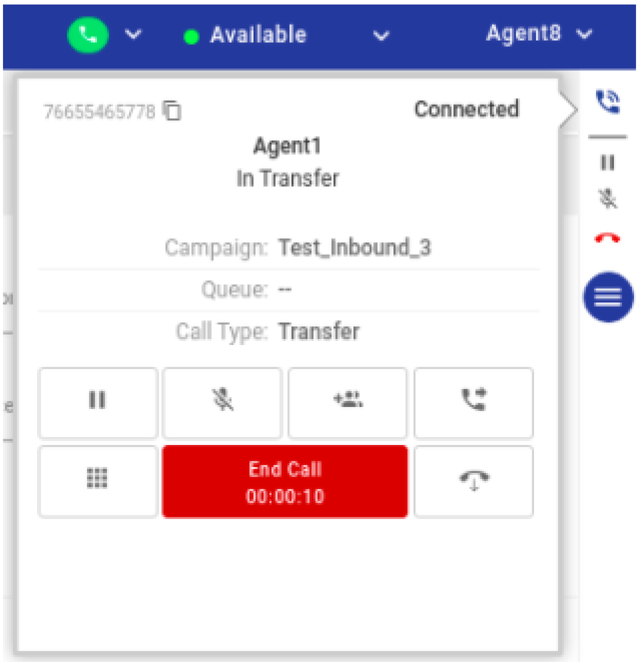


Figure: Call Transferred to New User

If the selected user is busy with another call, or the user is not available, then a toast notification will be shown to the agent notifying about the same.

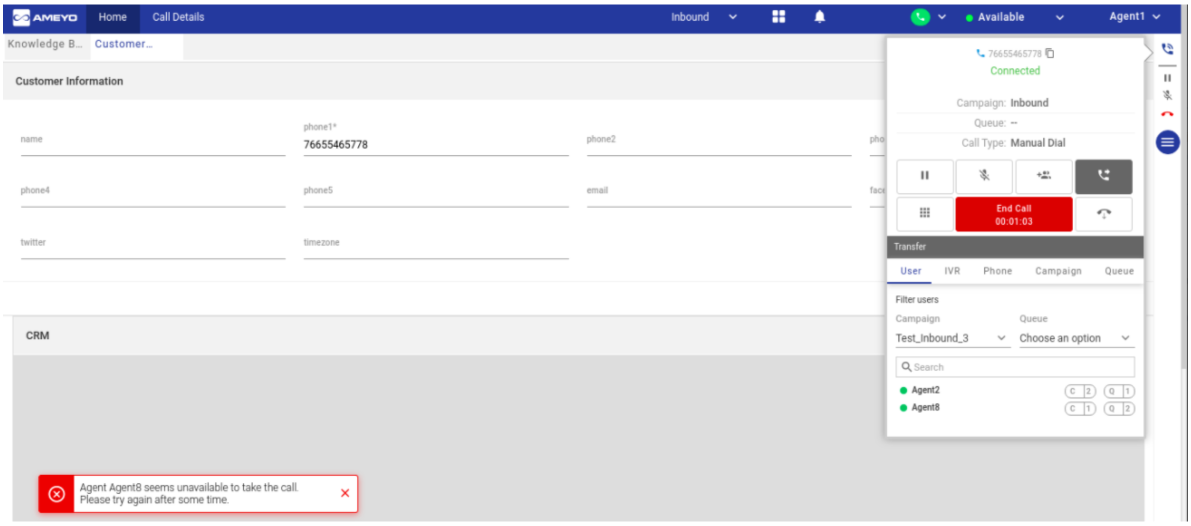


Figure: Notification when the User is not available to take the call

10.4.6.1.6 Add Notes

The agent can add the notes during or after the call. Enter your note in the "Add note" textbox of the telephony panel. If you want to provide the note during the call, then click the disposition button and then enter the note. Once you dispose the call, the note will automatically be saved and can be seen on the call details page.

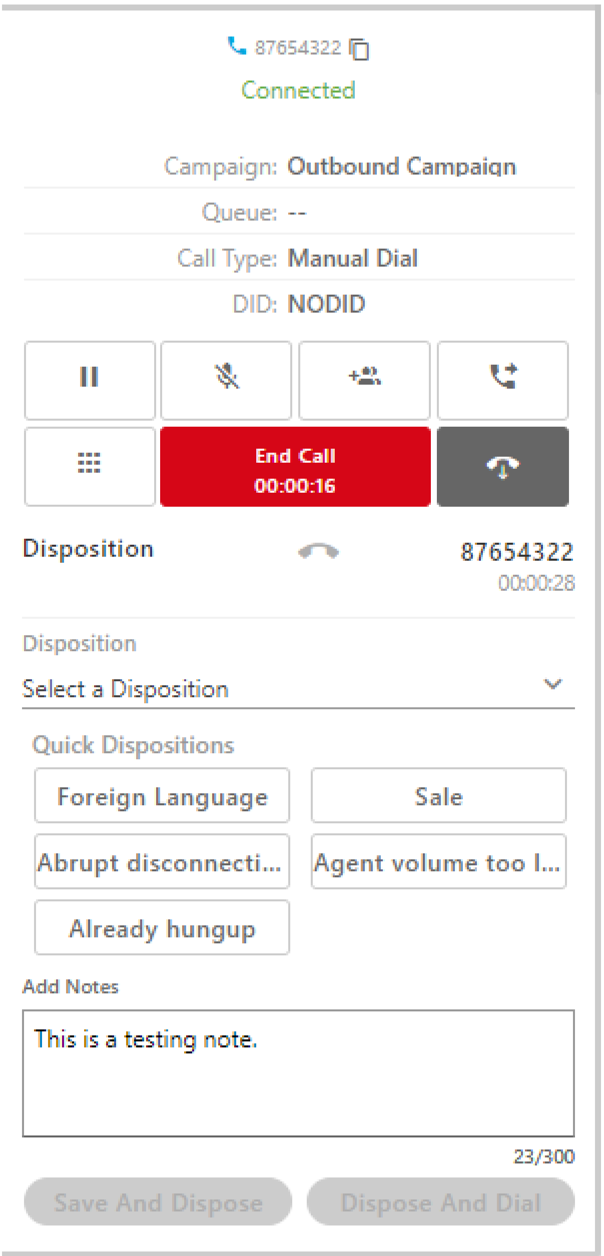


Figure: Adding the Call Note During the Call

10.4.6.1.7 Call Disposition

After completing the call, the two-level call dispositions are displayed in the telephony panel.

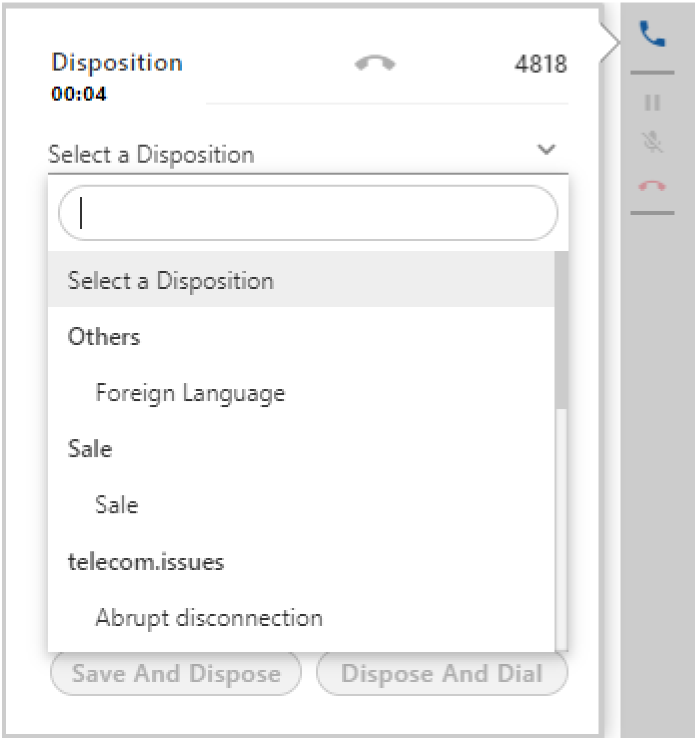


Figure: Dispositions of a Manual Preview Outbound Call

The agent has to select the disposition through the drop-down menu or select any of the on-screen displayed quick dispositions, as no disposition is selected there by-default. Until the agent do not select the disposition, the "Dispose" button remains unavailable to click.

Agent may receive any of the following disposition screens based upon the configurations.

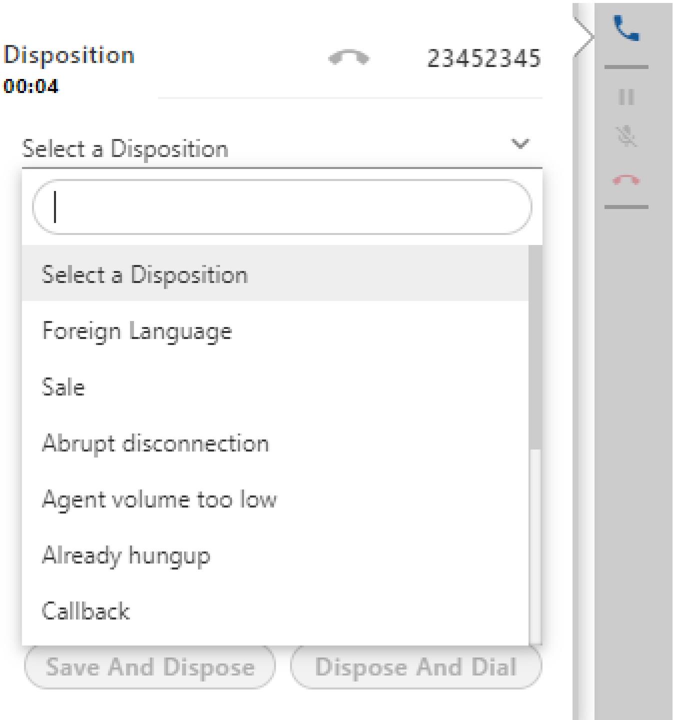


Figure: Single Level Disposition

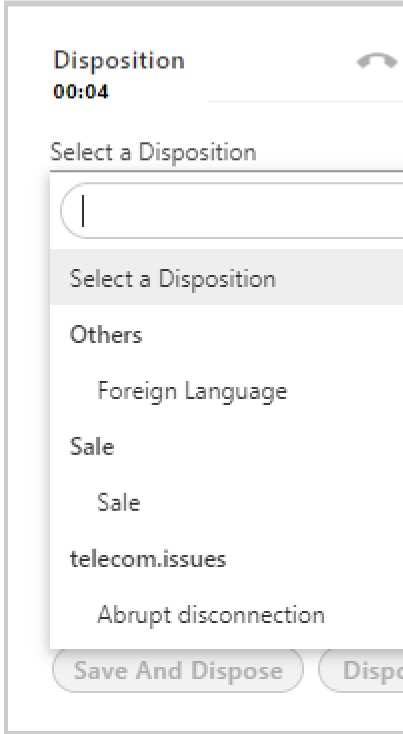


Figure: Two level Dispo

It contains the following two option of buttons.

- **Save and Dispose:** Click it to dispose the ticket associated with the call using the selected disposition.
- **(Licensable) Dispose and Dial:** Click it to dispose the current call ticket and continue to make a manual dial call. It shows a textbox at the bottom of telephony panel.

  It is a licensable feature, so contact your administrator about the license of the same.

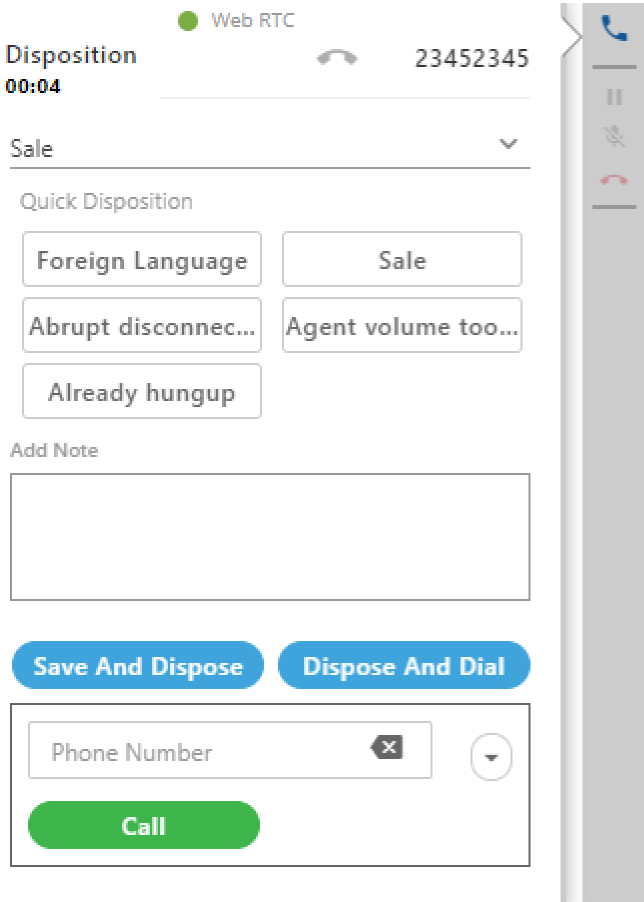


Figure: Continue to Manual Dial after Disposing Current Call

After entering the number, click "Call" to dispose the current call with the selected disposition and make a new outbound call with manual dial.

10.4.6.1.7.1 Restrict the Users to dispose the call from Telephony Panel and Allow them to dispose it from CRM only

If the administrator has configured and restrict the disposition of the call from the telephony panel, then the agent will not be able to dispose the call from Telephony Panel. In this case, the agents have to dispose the call through CRM only.

As soon as the call is ended, the telephony panel will not slide out to the left side from the right bar.

When the agent tries to dispose of the call in the telephony panel, then an error message is displayed.

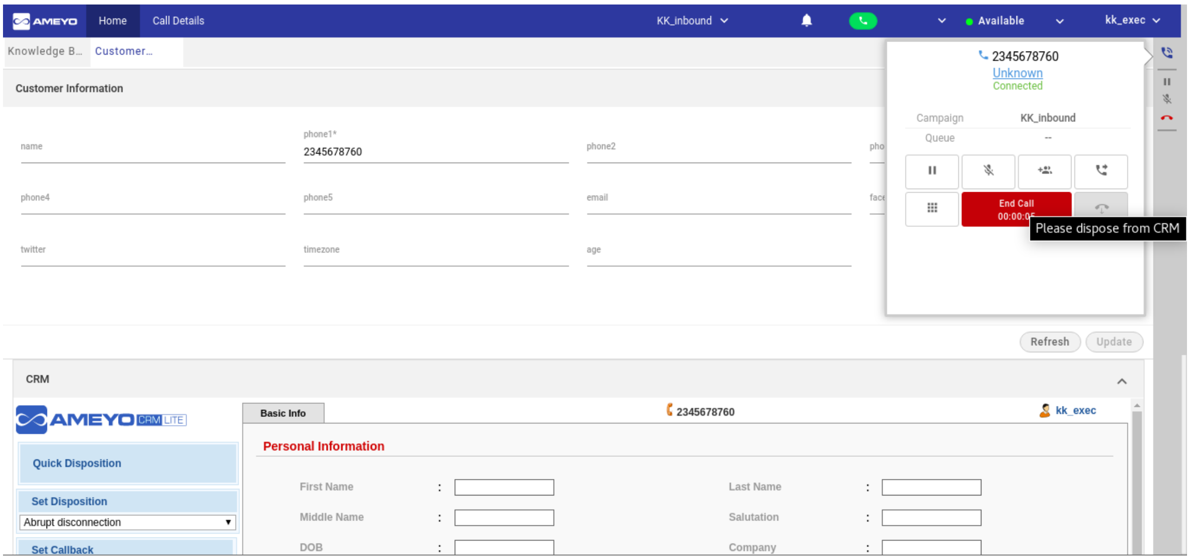


Figure: Disposition of Call is disabled in Telephony Panel

If the disposition is restricted at the telephony panel but can be done at CRM, then the "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.

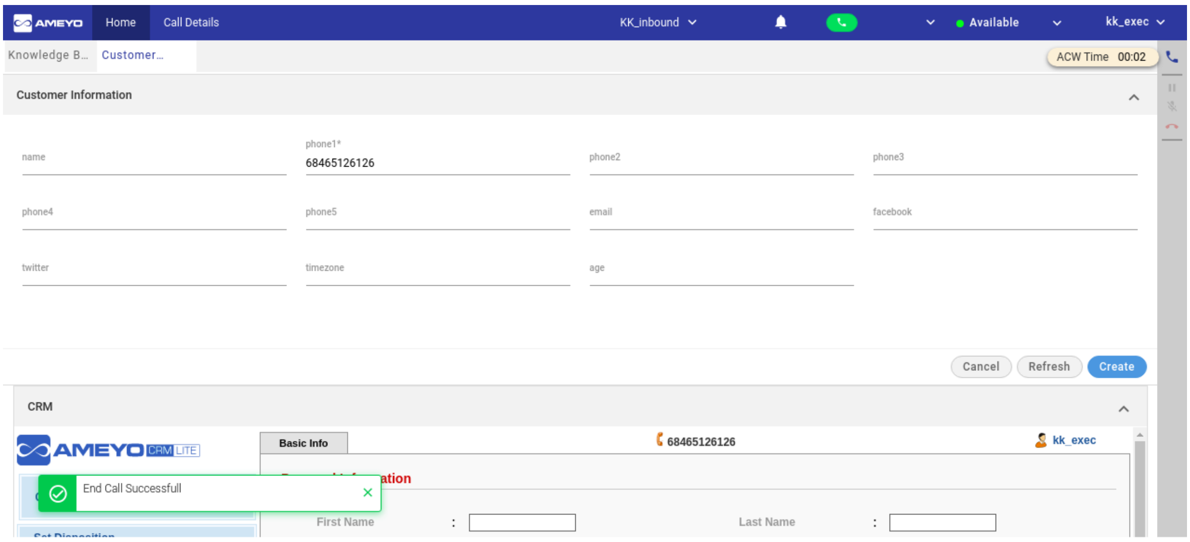


Figure: Disposed of the Call from CRM

If the disposition is disabled from the telephony panel, then Dispose and Dial will also be performed through CRM.

Callback and call notes are understood in the normal disposition operation through the telephony panel only.

10.4.6.1.7.2 Option to use the Customer Code while Transferring the Call to IVR

The customer code is a unique 6-digit code that can be used to request a transaction at the IVR linked with the Payment Gateway. The agents have the privilege to paste and use a custom code while performing a call transfer to IVR.

The agent can copy the code from the third-party CRM and paste it in the telephony panel during

- call transfer to IVR,
- cold transfer to IVR with the parameter and values (conferIVRData or ivrData): to replicate the crm screen from agent1 to agent2, and
- warm transfer to IVR with the parameter and values (conferIVRData or ivrData): to replicate the crm screen from agent1 to agent2.

Refer to the following screenshot.

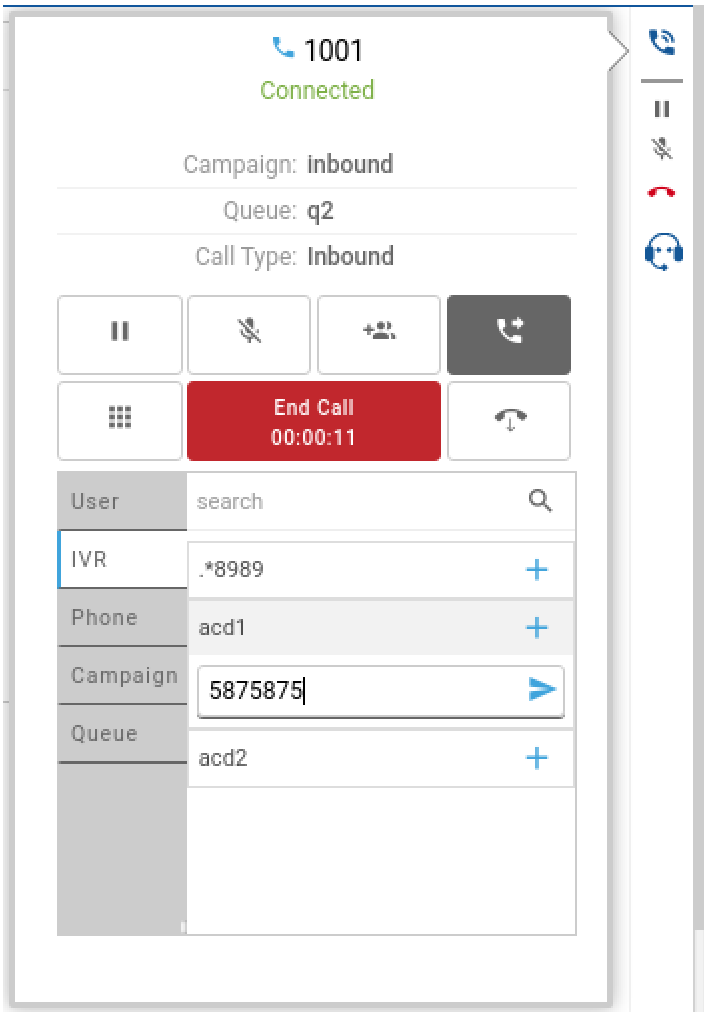


Figure: Copy Customer Code in Telephony Panel

10.4.6.1.7.3 BlackListing the customers at Agent Console (Workbench Level)

The agents also have been given the privilege to blacklist the customer's phone number. A disposition named "Blacklist Disposition" can be used to add the customer to the blacklist. The agent can use this blacklist disposition in both the telephony panel and in the web-chat modal.

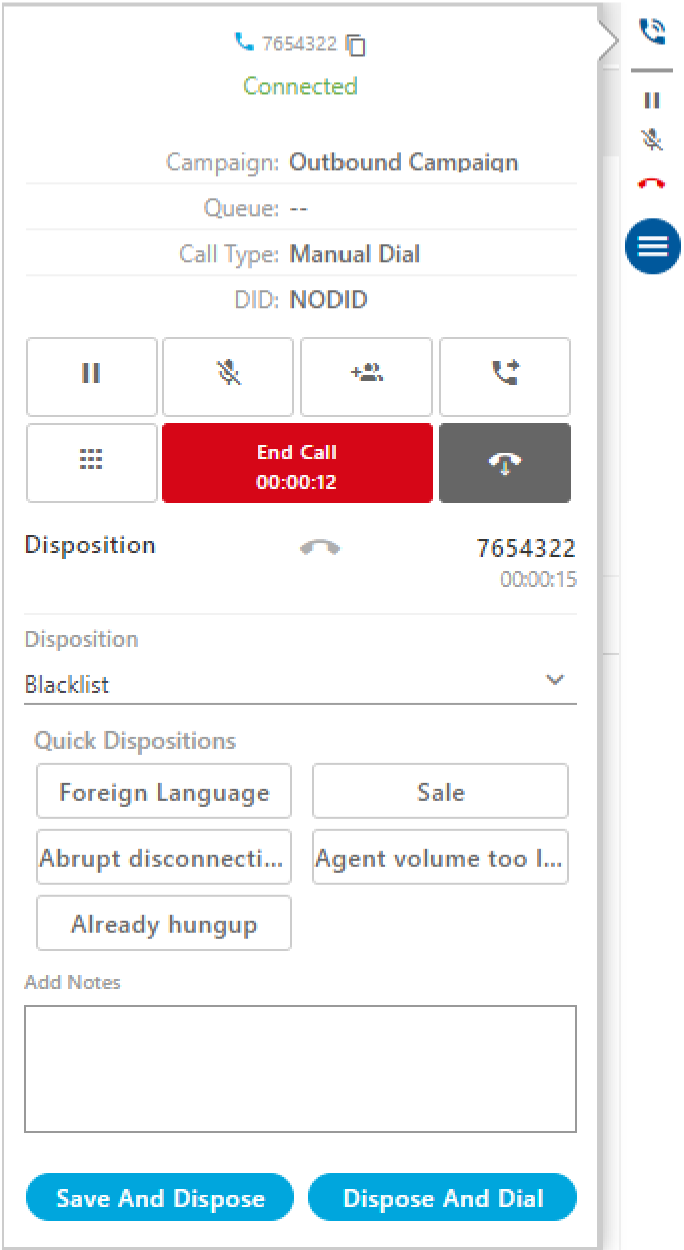


Figure: Blacklist Disposition at Telephony Panel

10.4.6.2 Create and Attach Tickets during Call

All the functionalities of create and attach tickets during call for supervisor and group manager are similar as that of agent.

Ameyo introduces the feature to create and attach new tickets, or attach the existing tickets to the call. A new option is provided to create the new tickets in the telephony panel, whereas the options are provided to attach the existing tickets on the Dashboard, in

Ticket Details Page, and in the list of tickets at Customer Information Page. It also shows the attached tickets.

The agent is able to create the tickets of the voice calls. The call ticket can either be created at the time of call or after the call while disposing it.

The agent can perform the following operation from here.

10.4.6.2.1 Attach Tickets to Call

"Create New" ticket option will be available in the telephony panel even when either no ticket is created and attached to this call or a ticket is already attached. During the call, Ameyo User can browse the Workbench, or the list of tickets in any Customer Information page, or a Ticket Detail Page to link the current call with the existing tickets or lite tickets. Tickets attached to the call will appear in the telephony panel.

If the ticket is not attached to any call, then the following message is displayed over "Create New" link.

```
This call is not attached with any ticket.

You can attach this call to an existing ticket or you can create a
new ticket/lite ticket. Tickets attached to the call will appear
here.
```

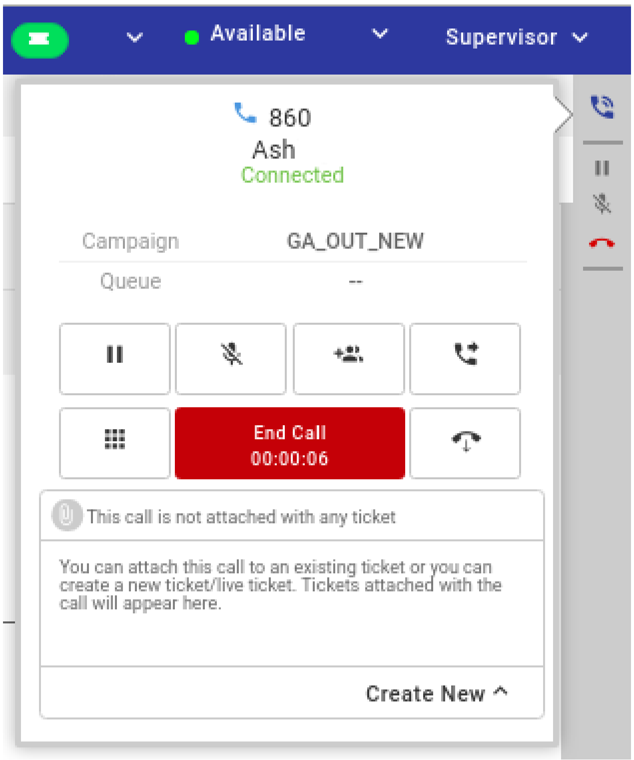


Figure: "Create New" option in the Telephony Panel

In the Dashboard, Customer Information Page, and Ticket Detail Page, an option to attach the ticket with the current call has been added. The user can either open a ticket, or attach a ticket through Dashboard, or create a new ticket through Telephony Panel. The attached tickets will be displayed at the bottom of the Telephony Panel.

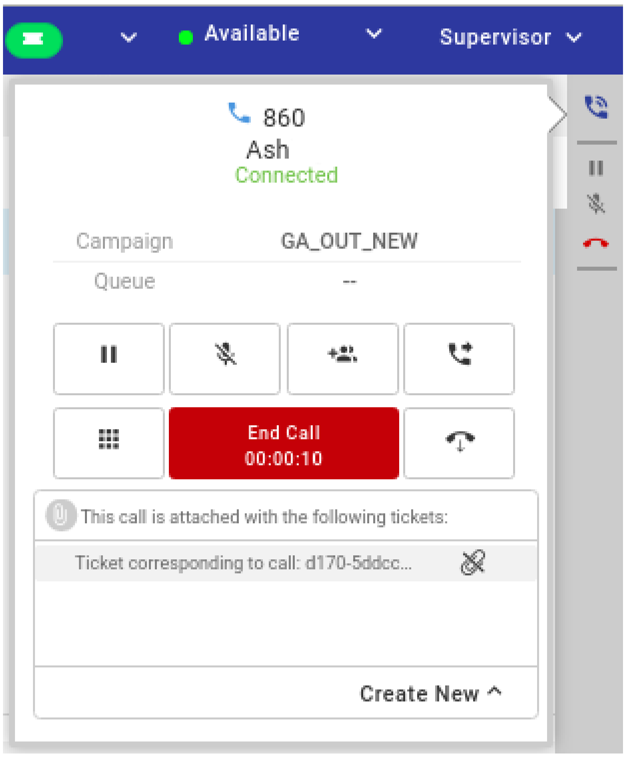


Figure: Ticket attached to a call

Multiple tickets can be attached to a call.

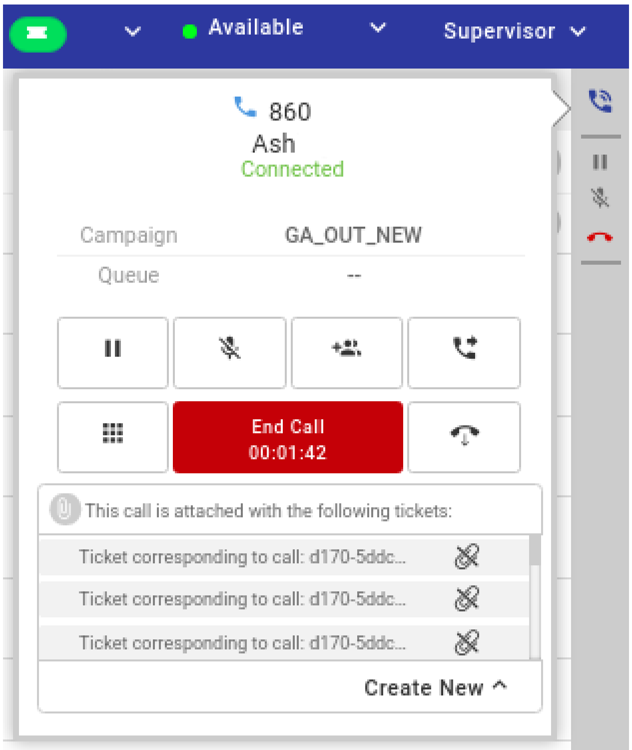


Figure: Attached Multiple Tickets

A message of Voice source type will be created in the tickets, which has been attached to the call. The Call Notes and Voicelogs of a call will be stored in all tickets, which has been attached to that call.

The user can either close the attached tickets during the call or after disposing of the call.

10.4.6.2.2 Create and Attach New Ticket to the Call

The agent is able to create the tickets of the voice calls. The call ticket can either be created at the time of call or after the call while disposing it. Click "Create New" button to create the new ticket. There are the following two types of the tickets which the agent can create.

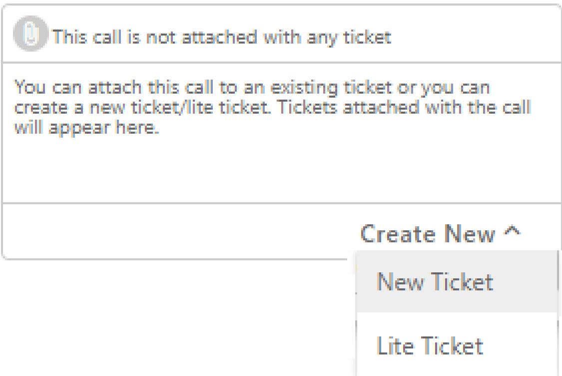


Figure: Create Ticket Selection

- **New Ticket:** Click "New Ticket" option to create a new ticket for that voice call. The option to create a new ticket is displayed on the page. Provide the information and Message with which you want to create the new ticket.

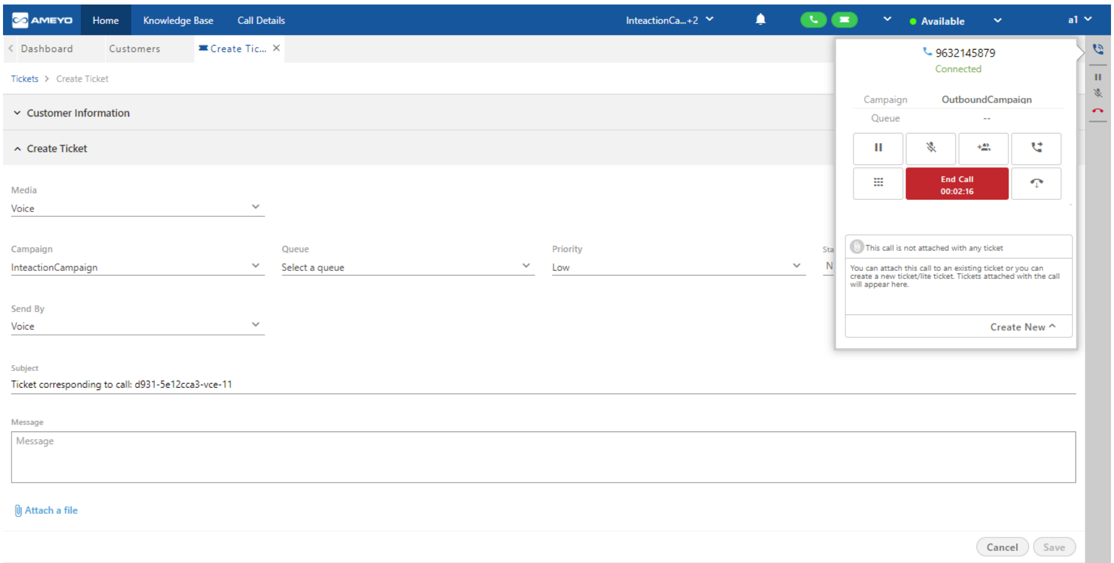


Figure: Provide the Message for New Ticket

After providing the information to create the ticket, click "Save" button present at the right bottom of the page. Know more...

- **Lite Ticket:** Lite ticket are the tickets lies in closed state. Select "Lite Ticket" option to create the lite ticket in closed state. Know more... about closed tickets.

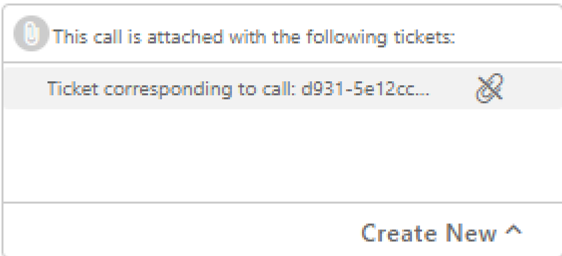


Figure: Lite Ticket is created

10.4.6.2.3 Case of Attaching Lite Tickets with Calls

Lite Tickets cannot store the comments added in the Telephony Panel in "Notes" section. Lite tickets will be disposed of with the call itself. The dCall Notes can be added and the Voicelogs of the Call will be attached in the Lite Tickets. Lite tickets are created in "Close" state itself.

10.4.6.2.4 Detach the Tickets

In the Dashboard, Ticket Detail Page, Customer Information Page, and Telephony Panel, the user can detach the tickets from the call. Whenever a ticket is detached from a call, then the Call Notes and Voicelogs of that call will not be stored on that ticket. Instead of it, the following message is stored as an activity in the detached ticket.

```
A call with CRT < > was detached from this ticket by <Agent>.
```

The attachment and detachment of tickets remains consistent and synchronized in Dashboard, Ticket Detail Page, Customer Information Page, and Telephony Panel.

10.4.6.2.5 Call Transfer or Call Conference Case in the same Queue of same Interaction and same Voice Campaigns

In the case of transfer or confer to user in the same queue or transfer to the same queue of both Voice Campaign and Ineraction Campaign, both the Ameyo Users can view each other tickets. If the call is not disposed of, then both agents could see the ticket attachment or detachment in the Telephony Panel.
In case of call transfer, if the call has not been disposed of, then both agents will receive notifications if the other agent detaches its ticket with the call.
Even if the call has been disposed of by the transferor agent, still the receiver agent will be able to detach those tickets during the call that are attached by the transferor agent.

10.4.6.2.6 Call Transfer or Call Conference in the different Queues of the same Interaction Campaigns and same or different Voice Campaigns

Tickets attached or created by both Campaigns will be listed in the telephony panel. And on click, the ticket will be opened as per the visibility configurations. The Visibility Configuration can be configured at system-level, campaign-level, and queue-level.

10.4.6.2.7 Call Transfer or Call Conference in the different Interaction Campaigns and same or different Voice Campaigns

Tickets of the different Interaction campaign will not be listed in the Telephony Panel.

10.4.7 Schedule Callback

All the functionalities to schedule a callback for supervisor and group manager are similar as that of agent.

The schedule callback feature helps us to callback customers for further follow-up

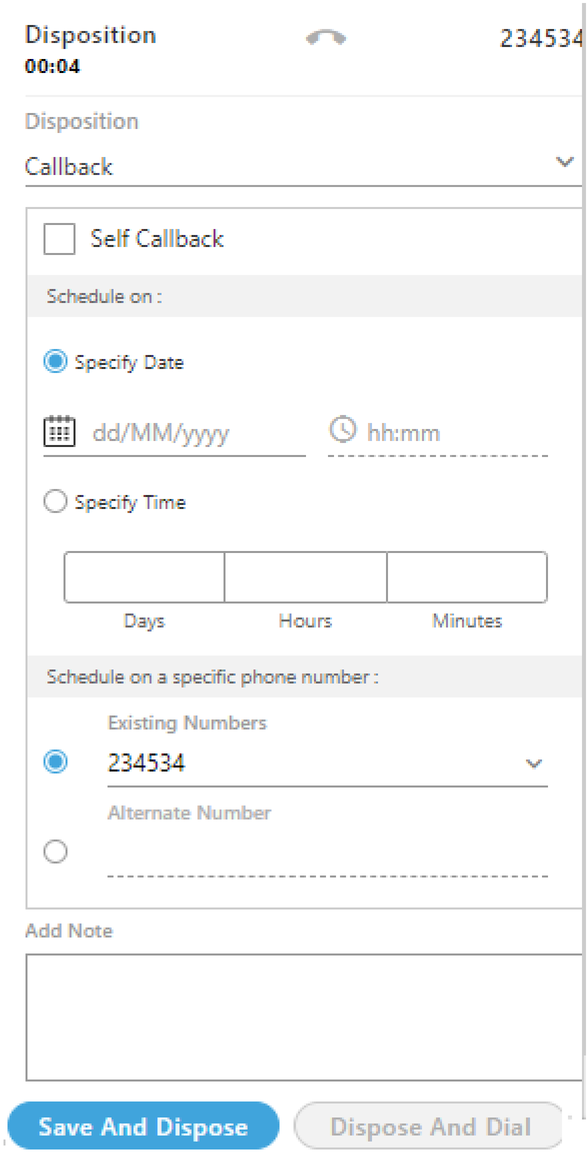


Figure: Schedule Callback

1. If any caller requests for a callback then the agent disposes the call as callback and the callback will be scheduled accordingly.
2. In order to schedule a callback in Ameyo system the agent needs to select the "callback" value from the disposition drop down.

3. In case agent wants to schedule a self callback i.e, the callback should only be routed to him/her and not to any other random user in the campaign then check the "Self Callback" option, else uncheck this option to route the scheduled callback to any available user in the campaign.

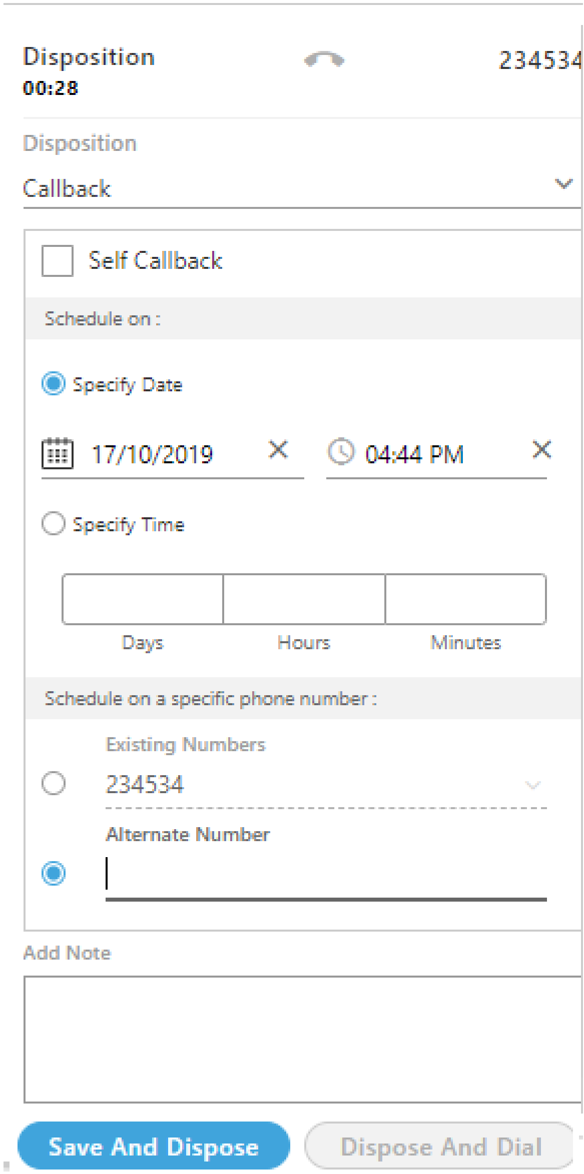


Figure: Callback Scheduled

4. Agent can either schedule a callback for a specific date, select the radio button "Specify date" and choose the date from calendar option and time from the provided Hrs and Mins clock.

5. Or agent can select the "Specify time" radio button to schedule the callback for the specified date and time.
6. The agent can specify the number on which the call has to be made, that is, if the call has to be made on the same number dialed currently, then select "Existing Numbers" radio button, else select "Alternate Number" and provide the alternate number.
7. Click "Save And Dispose" button to schedule the callback.

The scheduled call backs for an agent are displayed in "Call Back" tab of "Call Details".

The supervisor and group manager can view the scheduled callbacks from Callbacks tab in Voice Campaign.

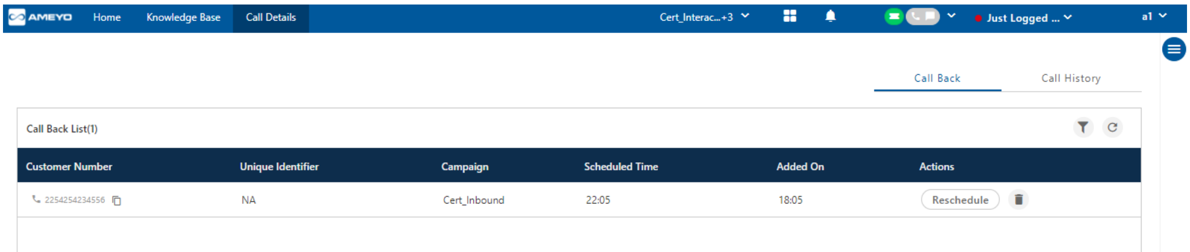


Figure: Callback Tab

If the agent is not available or the status is not set to available at the time of callback, then the system automatically retries the call after the time duration configured by supervisor. If the agent calls the customer manually, then the scheduled callback will not remove from the list of callbacks and system will dial the call on its scheduled time. Know more...

There are several cases when the agent gets transfer to another campaign. In such cases, all the callbacks scheduled by or for that agent will not be taken into consideration or non-traceable. But, the supervisor can assign those callbacks to the assigned agent and hence, the agent can use his callbacks.

10.4.8 Callback Notification

1. An agent can view its upcoming callbacks by clicking  icon (if same is configured by supervisor) and can wrap the existing call accordingly.

The notification for the upcoming callback time depends upon the configured time from supervisor.

2. Information related to scheduled callbacks will be shown at the top of the screen. It contains the name, and number of the customer and date and time for the scheduled callback.

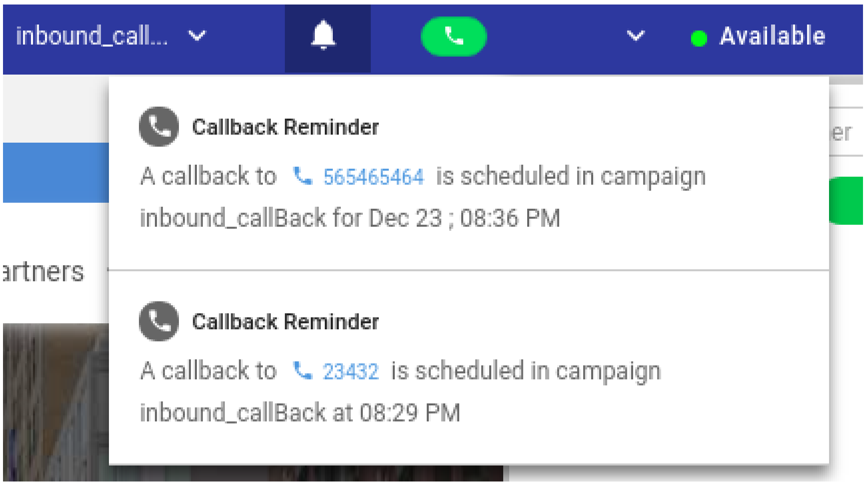


Figure: Callback Notification Pop-up

10.4.9 Actions on the Callback Notifications

There are numerous cases where a callback is scheduled for the agent but the agent is planning to take a break. In such cases, the agent should need to perform an action on the notification received for the callback. Now, the agent can click a notification to dial the callback.

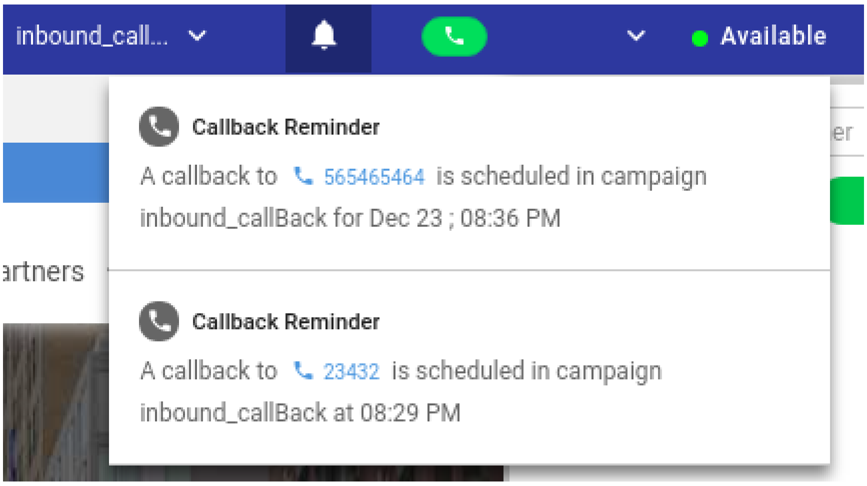


Figure: Actionable in Callback Notifications

The callback Notification has been made clickable. In the Notification, the agent can click the number to perform a manual dial to that number. On clicking the callback reminder bell notification, the agent is redirected to the workbench page callback is initiated. The telephony panel will have details for that callback. The behavior of connecting and disposing of the callbacks will be the same as that of making the callbacks through the Callback page. Once done, the callback will be removed from the Callback page of that agent, and the notification will also be removed.

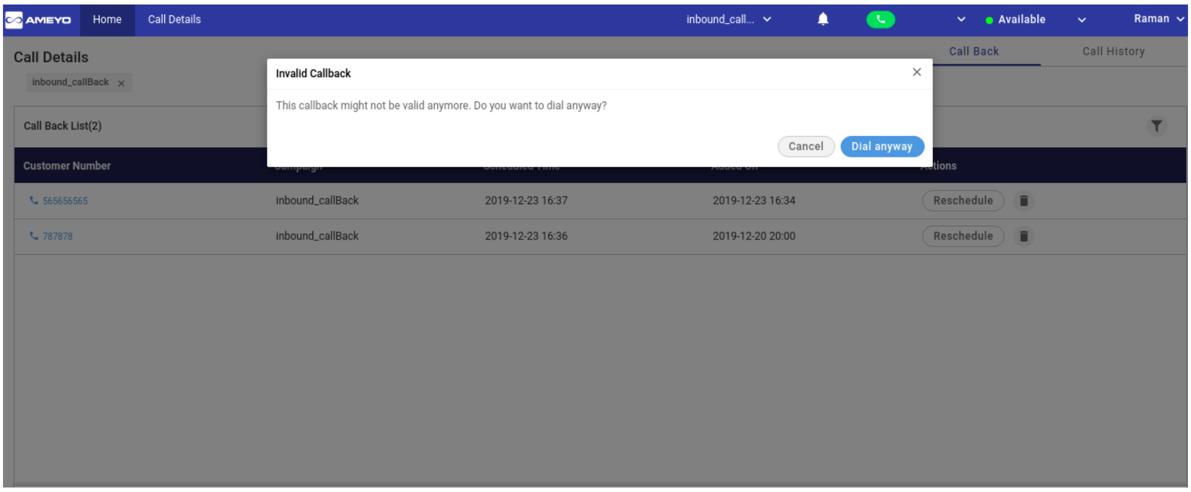


Figure: Reminder for Dialing a Callback

10.4.10 Call Details

Through "Call Details" tab, the agent can view its upcoming callbacks and can also fetch the call history. Itn contains the following two sub-tabs.

- Callbacks
- Call History

The Call Details tab (including Call History and Callbacks both) is not present for the Supervisor and Group Manager here. However, the Call Details tab is present in Manage menu of Voice campaigns of supervisor and group manager. Click the following links to know more.

- Call History tab for Supervisor

- Call History ftabor Group Manager
- Callback tab for Supervisor
- Callback tab for Group Manager

10.4.10.1 Callbacks

This tab shows the callbacks scheduled for the agent at system level (for all campaigns).

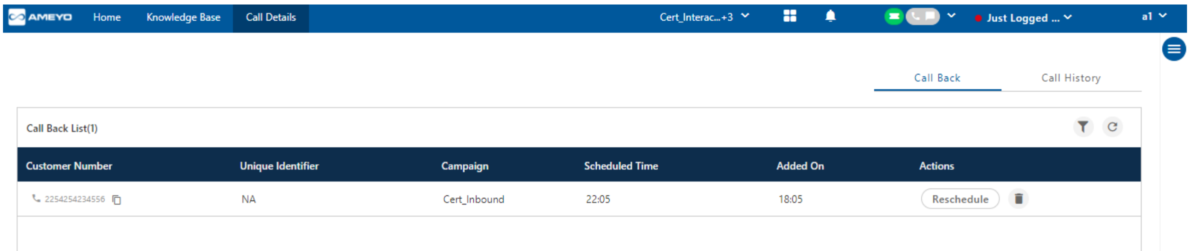


Figure: Call Back Tab

The agent can click "Filter" to apply the filters.

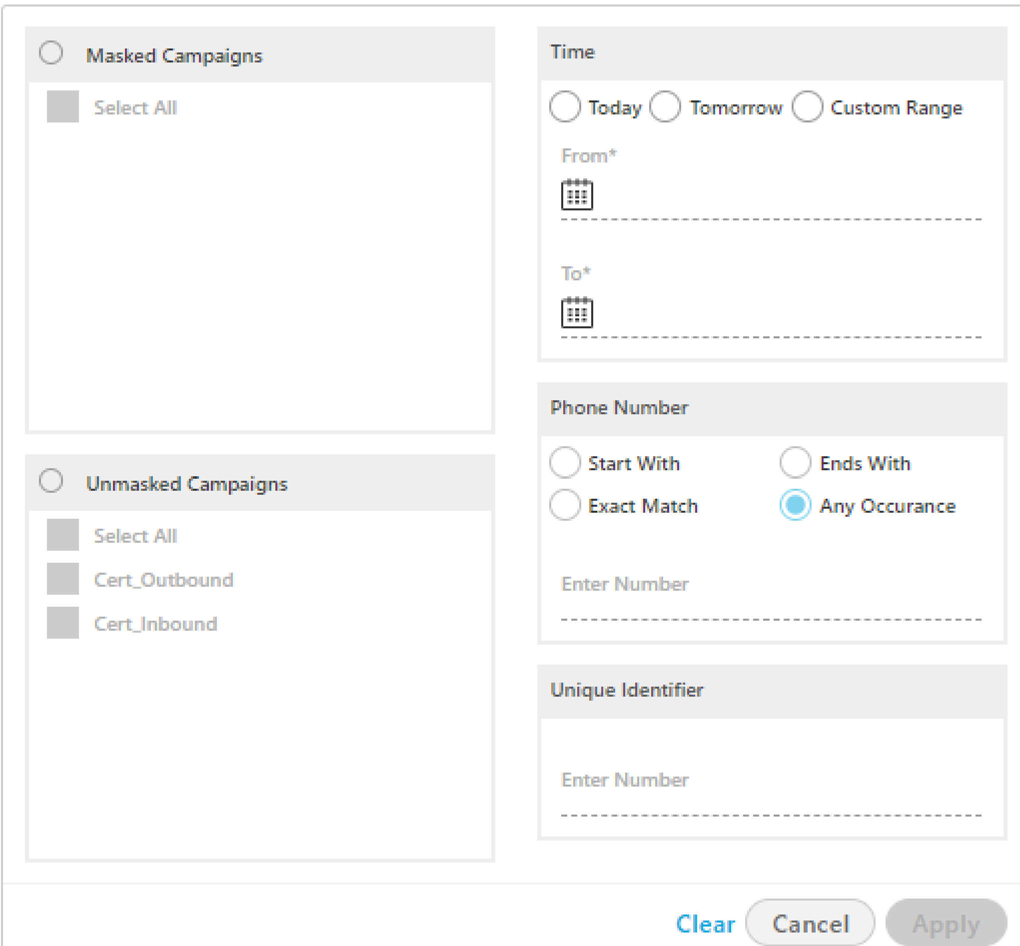


Figure: Call Back Filters

The agent can filter the call details with the following filters.

1. **Masked Campaign:** It contains the list of the campaigns in which masking is enabled. If the agent is not assigned in the masked campaign then no campaign will be shown in the list.
2. **UnMasked Campaign:** It contains the list of the campaigns in which masking is not enabled. The agent can select multiple campaigns to filter the callbacks lists.
3. **Time:** Provide the time range for which the agent wants to filter the call details. The agent can choose the time from the available following filters.
    - **Today:** It shows all the call-back details of the same day.
    - **Tomorrow:** It shows the scheduled call-back details of the next coming day.
    - **Custom Range:** It shows all the scheduled call-backs of the provided range of the date. Once you select the date, the present time is selected automatically.
4. **Phone Number:** Provide the specific phone number for which the agent wants to filter the scheduled call-back. Following are the filters present to see all the call-backs.
    - **Start With:** It lets you to search the call details of the phone number while providing its initial few digits of the phone number.
    - **Exact Match:** It lets the agent to search the call details of the customer whose phone number is provided as it is.
    - **Ends With:** It lets you to search the call details of the phone number while providing its last few digits of the phone number.
    - **Any Occurrence:** It lets the agent to search for all the details of the phone numbers whose few digits are provided.
5. **Unique Identifier:** If the masking is enabled, then a unique identifier will generate for every callback. The agent can provide this unique identifier to filter the callbacks.

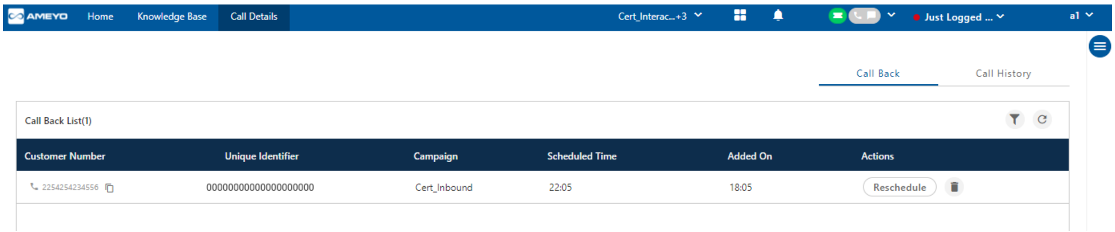


Figure: Filter Callbacks based on Unique Identifier

Select the Campaign name, Time of the callback or the phone number to get the list of the callback. Click "Apply" button.

Click "Clear Filter" to clear the filter and to view the default list of all callbacks.

Agent can see only his callback list. The agent is not allowed to watch the other agent's scheduled callbacks.

10.4.10.1.1 Click to Dial Callback

There are cases when the agent will not be present at seat at the scheduled callback time or the agent has to call early from the defined time to the customer whose callback is scheduled. In such cases, the agent can click 9632014587 icon on the callback list to dial the call directly from the callback page. It helps and save the time of the agent.

After clicking a number, the agent will be redirected to "Workbench" tab from "Callback" tab and a CTI pop-up is displayed.
If the call is ongoing, then an error message will be displayed when the agent clicks on the number to dial it.
As soon as a number is dialed in "Callback" tab through Click to Dial or another method, it will be removed from Callback list even if it was dialed before its scheduled time.

If the customer name is not filled or left blank, then at the time of the callback the telephony panel will display "UNKNOWN" as the customer name.

10.4.10.1.2 Reschedule Callback

Agent can reschedule the date and time of his callbacks at any time. Perform the following steps to reschedule the callback.

1. Select the callback from the list of the callbacks.

2. Click Reshedule button.
3. A pop-up comes up in which you have to provide the date and time of the callback.
4. Enter the date in *"dd:mm:yyyy"* format.

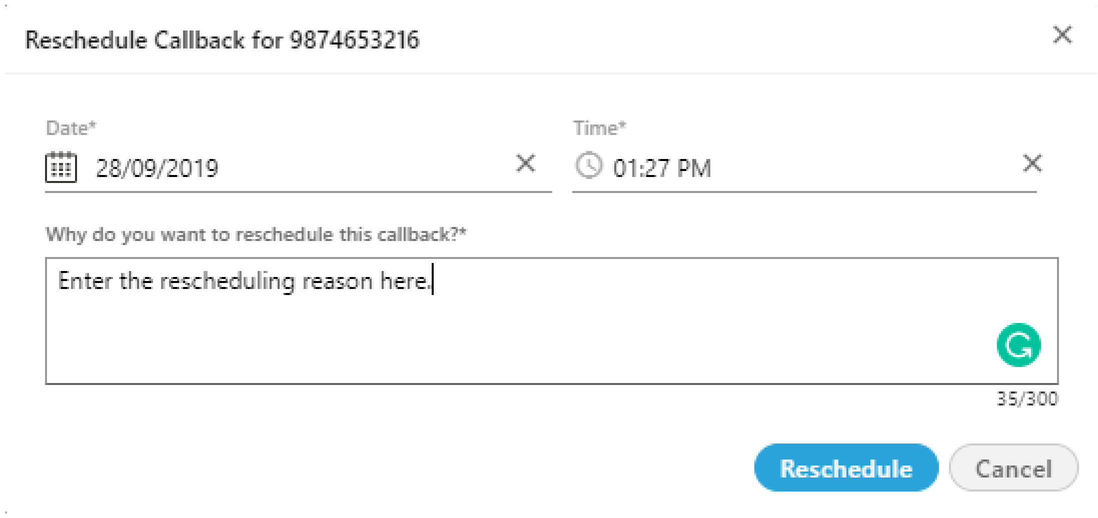


Figure: Reschedule the Callback

5. Select the Time from the clock and then click "OK" button.
6. Enter the reason for which you are rescheduling the call.
7. Click "Reschedule" button.

The call is successfully rescheduled. The agent can check the same from the callback list.

10.4.10.1.3 Delete Callback

Click icon to delete the scheduled callback.

A pop-up comes up in which you have to enter the reason. Reason is mandatory to enter, otherwise the callback will not delete. Click "Delete" button to delete the file otherwise click "Cancel".

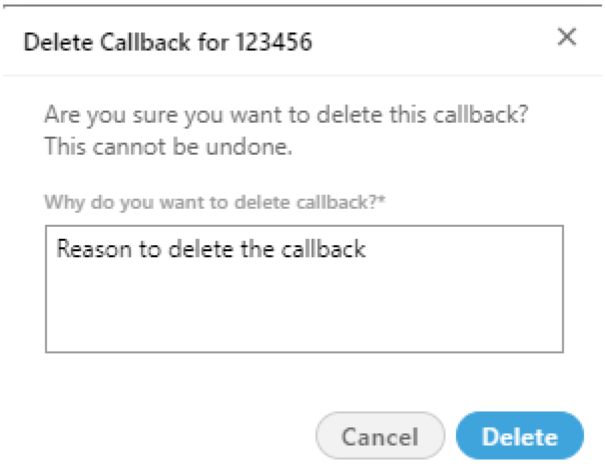


Figure: Delete pop-up

10.4.10.2 Call History

Call History Tab shows the history of calls made or received by the agent.

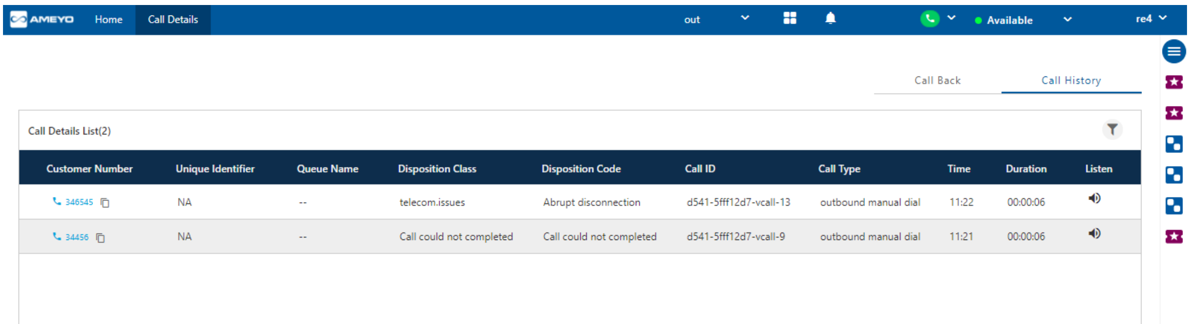


Figure: Call History

Call History is shown in terms of the following attributes.

1. **Customer Number:** It shows the customer number on which call was made or from which call was received.
2. **Unique Identifier:** If the masking is enabled in a campaign then a unique identifier will generate and show in this column for the respective call.
3. **Queue Name:**It shows the queue name in which call was received.
4. **Disposition Class:** It shows the disposition class with which the respective call was disposed.

5. **Disposition Code:** It shows the disposition code with which the respective call was disposed and used by the agent.
6. **Call ID:** It shows the Id of the call. Every call has its unique Id.
7. **Call Type:** It shows the type of the call.
8. **Time:** It shows the date and time at which the inbound call came or at which the outbound call was dialed.
9. **Duration:** It shows the total call duration of the respective call.
10. **Listen:** It shows the voice recording of the call. For connected calls, recording is played and agent can listen to that call and also he can download that voice log by clicking on (download) symbol, For, non-connected logs, it will not play any recording.

Figure: Play Call Recording

The agent can download the voicelogs of the searched phone number from the listen pop-up. Click the download icon and the pop-up to save the voicelog will come.

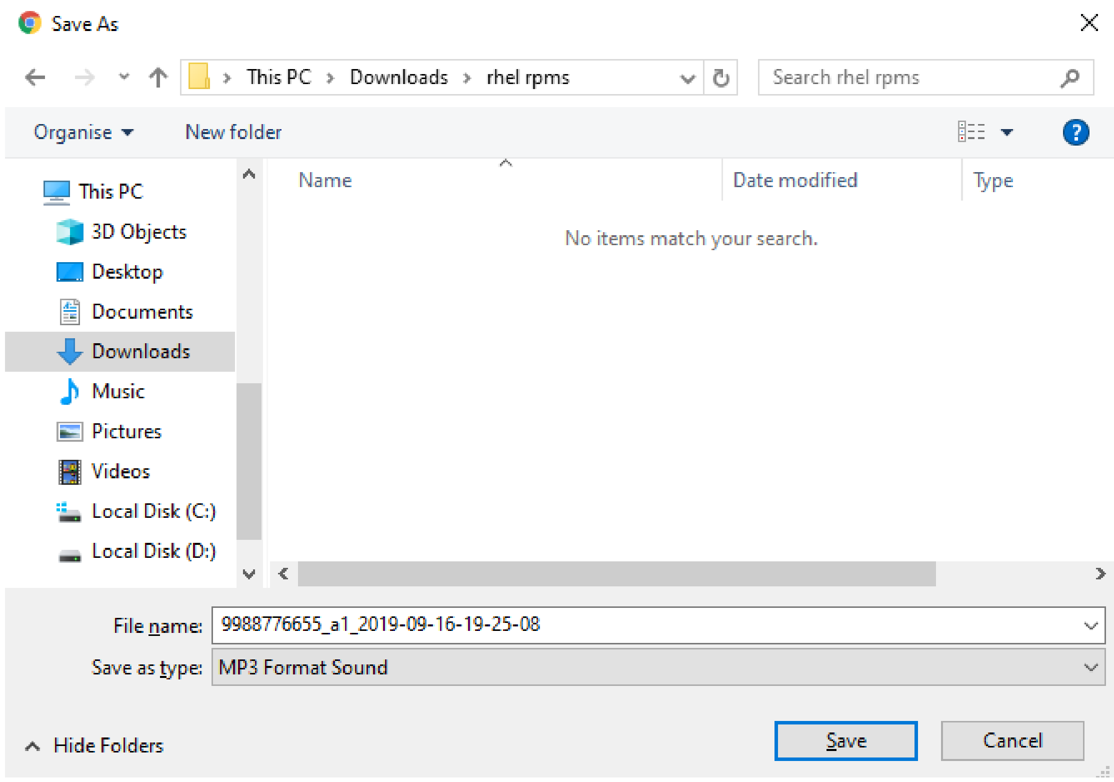


Figure: Download Call Recording

Provide the download location and you may change the name of the downloading file as well from here. The default name of the voicelog is the phone-number of the customer followed by the agent name and the time of the call.

The downloading pop-up depends upon the browser's settings.

10.4.10.2.1 Copy Phone Number

The agent can copy the phone number of the customer. Click icon to copy the phone number of the customer. After copying the phone number the agent can paste the copied phone number in the telephony panel to make a call.

10.4.10.2.2 Call Notes

The notes which are given by the agent at the time of the calls are known as call notes. The agent can view these notes along with the details of that call. Click icon to view the call notes of that call.

The agent can filter for the calls in which the call notes are given through filters option.

	Customer Number	Queue Name	Disposition	Call ID
	09876543	--	wrap.timeout	d700-5f0ec9c5-vcall-20
⌄	23452345345	--	Already hungup	d700-5f0ec9c5-vcall-15
	This is the testing note with the Outbound call.			

Figure: Filter Call Notes

10.4.10.2.3 Click-to-Dial Feature

Click to Dial feature on this tab allows the supervisor to make a call instantly with just a click.

The CTD (Click to Dial) icon is displayed with the phone number in "Call Details". The User can click this icon to dial the number manually. Once clicked, the CTI Pop-up is displayed. If the User is already on a call, then the error is displayed.

If the User is on "Call Details" page of Workbench and has not selected the extension, then the modal to select the extension appears during click to dial.

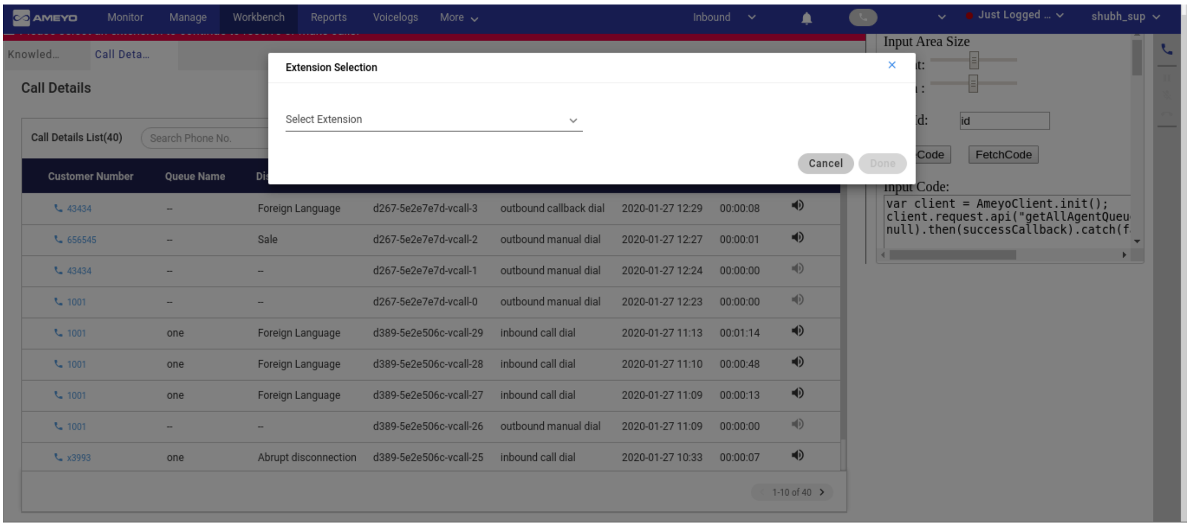
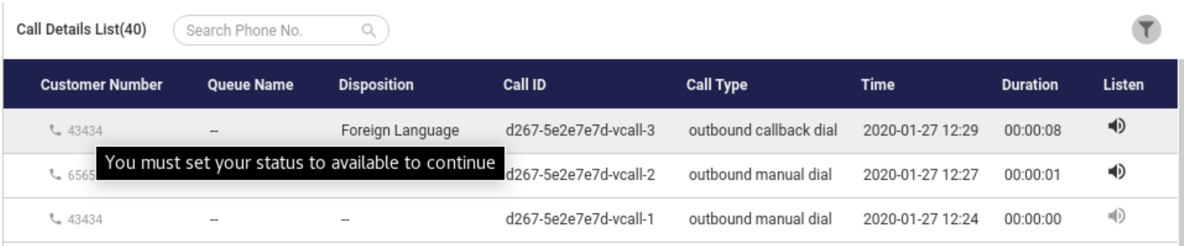


Figure: Select Extension in "Call Details" Tab

If the User is not available, then the following error message is displayed during click to dial.

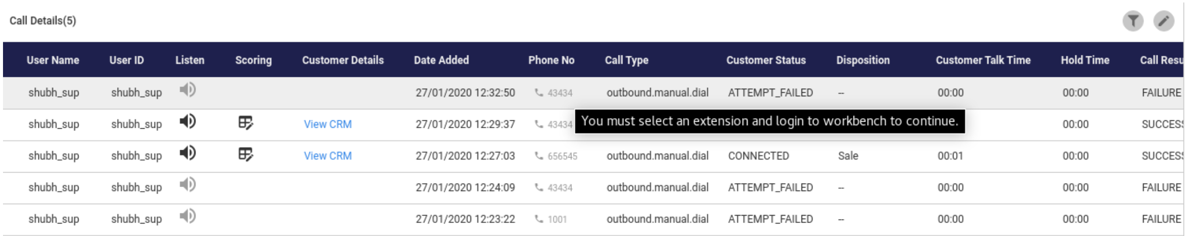


Call Details List(40)

Customer Number	Queue Name	Disposition	Call ID	Call Type	Time	Duration	Listen
43434	--	Foreign Language	d267-5e2e7e7d-vcall-3	outbound callback dial	2020-01-27 12:29	00:00:08	
6565			d267-5e2e7e7d-vcall-2	outbound manual dial	2020-01-27 12:27	00:00:01	
43434	--	--	d267-5e2e7e7d-vcall-1	outbound manual dial	2020-01-27 12:24	00:00:00	

Figure: User have to set the status as Available

If the Supervisor has neither selected the extension nor logged on to the Workbench, then the following error message is displayed during click to dial.

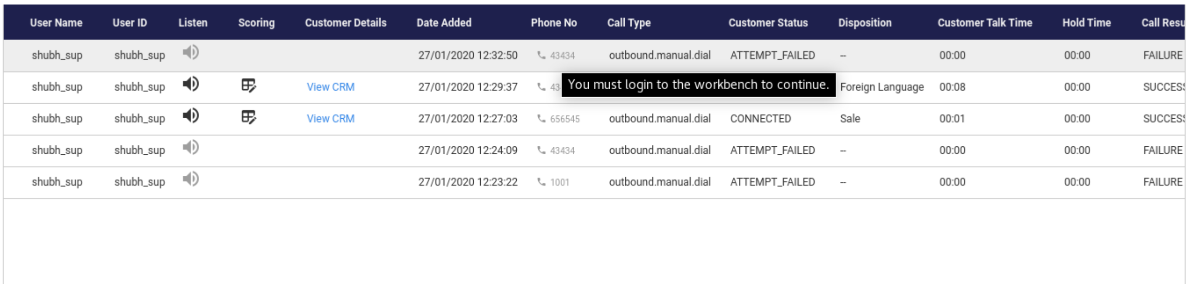


Call Details(5)

User Name	User ID	Listen	Scoring	Customer Details	Date Added	Phone No	Call Type	Customer Status	Disposition	Customer Talk Time	Hold Time	Call Resu
shubh_sup	shubh_sup				27/01/2020 12:32:50	43434	outbound.manual.dial	ATTEMPT_FAILED	--	00:00	00:00	FAILURE
shubh_sup	shubh_sup			View CRM	27/01/2020 12:29:37	43434					00:00	SUCCES
shubh_sup	shubh_sup			View CRM	27/01/2020 12:27:03	656545	outbound.manual.dial	CONNECTED	Sale	00:01	00:00	SUCCES
shubh_sup	shubh_sup				27/01/2020 12:24:09	43434	outbound.manual.dial	ATTEMPT_FAILED	--	00:00	00:00	FAILURE
shubh_sup	shubh_sup				27/01/2020 12:23:22	1001	outbound.manual.dial	ATTEMPT_FAILED	--	00:00	00:00	FAILURE

Figure: Error Message to logon to Workbench and Select Extension

If the Supervisor has selected the extension but not logged on to workbench, then the following error message is displayed during click to dial.



User Name	User ID	Listen	Scoring	Customer Details	Date Added	Phone No	Call Type	Customer Status	Disposition	Customer Talk Time	Hold Time	Call Resu
shubh_sup	shubh_sup				27/01/2020 12:32:50	43434	outbound.manual.dial	ATTEMPT_FAILED	--	00:00	00:00	FAILURE
shubh_sup	shubh_sup			View CRM	27/01/2020 12:29:37	43			Foreign Language	00:08	00:00	SUCCES
shubh_sup	shubh_sup			View CRM	27/01/2020 12:27:03	656545	outbound.manual.dial	CONNECTED	Sale	00:01	00:00	SUCCES
shubh_sup	shubh_sup				27/01/2020 12:24:09	43434	outbound.manual.dial	ATTEMPT_FAILED	--	00:00	00:00	FAILURE
shubh_sup	shubh_sup				27/01/2020 12:23:22	1001	outbound.manual.dial	ATTEMPT_FAILED	--	00:00	00:00	FAILURE

Figure: Error Message to logon to Workbench

- If the current extension of the agent is busy, then disable the CTD/show error.
- A call will be added to the call details page if the agent uses click to dial functionality.

Filter

The agent can click "Filter" button to filter the list of call history.

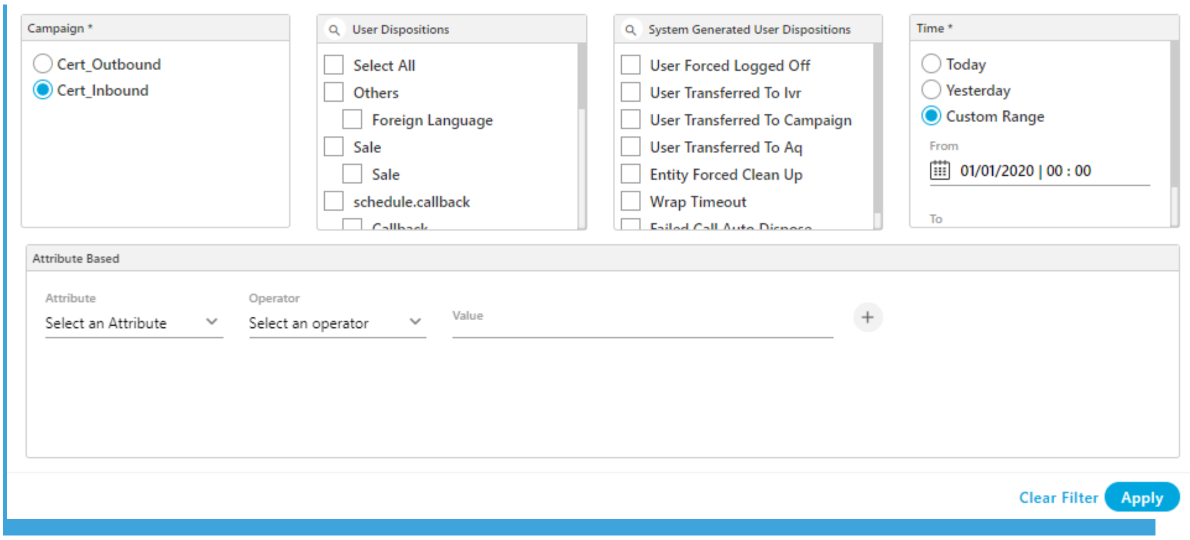


Figure: Call History Filters

Select the filter and click "Apply". Click "Clear Filter" to clear the filter and to view the default list of callbacks.

The agent can filter the call details with the following filters.

1. **Campaign:** Select the campaign from which the agent wants to filter the call details. It contains only those campaigns in which the agent is assigned.
2. **User Disposition:** Select the user disposition for which you want to filter the call detail history.
3. **System Disposition:** Select the system generated disposition for which you want to filter the call detail history.
4. **Time:** Provide the time range for which the agent wants to filter the call details. The agent can choose the time from the available following filters.
    - **Today:** It shows all the call-back details of the same day.
    - **Tomorrow:** It shows the scheduled call-back details of the next coming day.
    - **Custom Range:** It shows all the scheduled call-backs of the provided range of the date. Once you selected the date, the present time is also selected as the default time.
5. **Attribute Based:** Agent can select the attribute based upon the defined filterable field in the table creation. Perform the following steps to filter through attribute based filters.

- Select the campaign in which attribute based filter, that is, the filterable fields are mapped.
- Now, in attribute based filter section, select the attribute type, which is the column name which is mapped as filterable field in campaign by the administrator.
- Select the operator type through which you want to filter the calls. It contains the following three operators.
    A. **Contains:** It filter the calls which contains the provided input in their values.
    B. **Equals:** Selecting "Equals" as the operator will filter the calls which have the exact match to the applied content.
    C. **Not Equals:** Selecting "Not Equals" as the operator will filter the calls which do not have the match to the applied content.
    D. **Starts with:** It will filter those content, in which the entered attribute is starts with.
    E. **Ends with:** It will filter those content, in which the entered attribute is ends with.
- Now, enter the value for which you want to filter the calls in the values column.

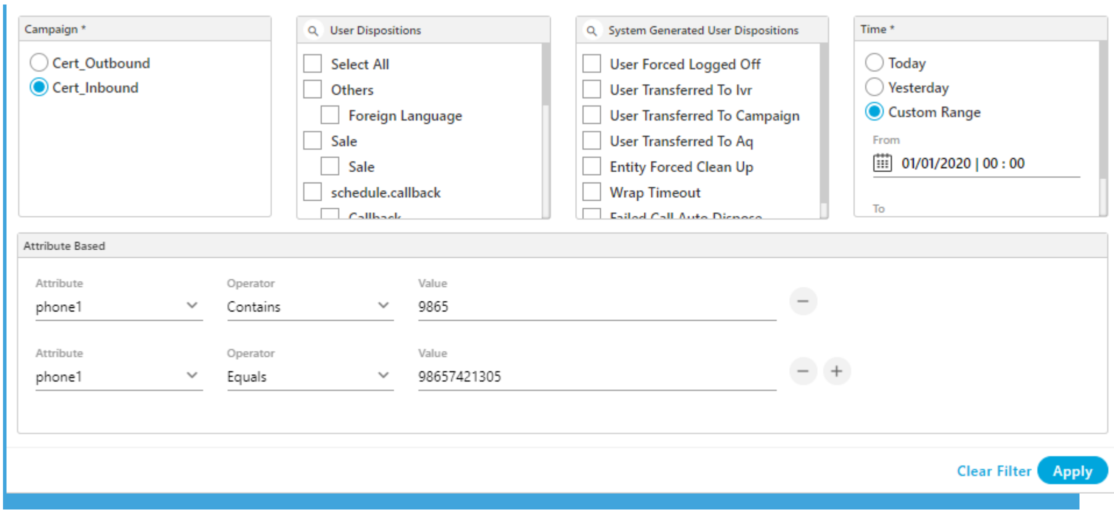


Figure: Attribute based Filter content

You can provide multiple attributes to search the content, by clicking "+" icon, or click "-" icon to delete the provided attribute based filter.

11. Agent Account Menu

To access the Agent Menu, click on the Agent name icon at the top-right of the screen.

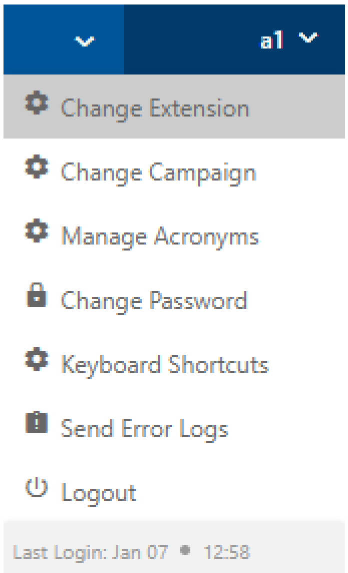


Figure: Agent Account Menu

Last Login Date-Time: It shows the last login date and time of the agent. It helps the agent to recognize that when he loggedin to the Ameyo.

The Agent can perform the following operations from the Menu tab:

1. **Change Extension:** This option allows the Agent to change his Extension on which he was working previously. To change the Extension, click on the "**Change Extension**" button and the pop-up to change the Extension will come then, select the Extension which you want to select.

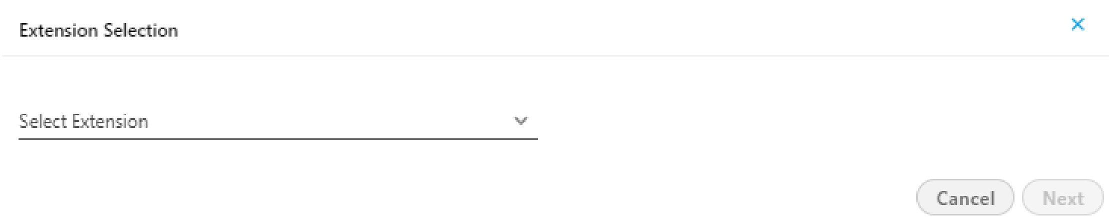


Figure: Change Extension Pop-up

2. **Change Campaign:** Through this option, the Agent is able to change the Campaign. To change the campaign, click **Change Campaign** button and then select the campaign which you want to select from the pop-up. It also allows you to select multiple campaigns at the same time.

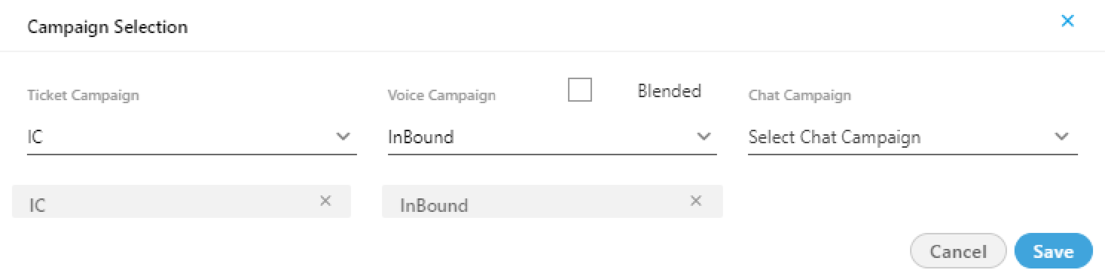


Figure: Change Campaign Pop-up

3. **Change Password:** This option allows the Agent 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.

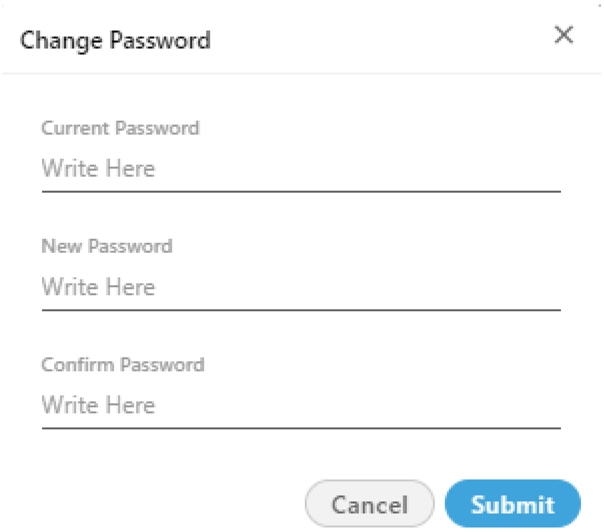


Figure: Change Password Pop-up

4. **Manage Acronyms:** This option allows the agent to see the list of the campaign Acronyms which was created at the campaign level by a Supervisor.

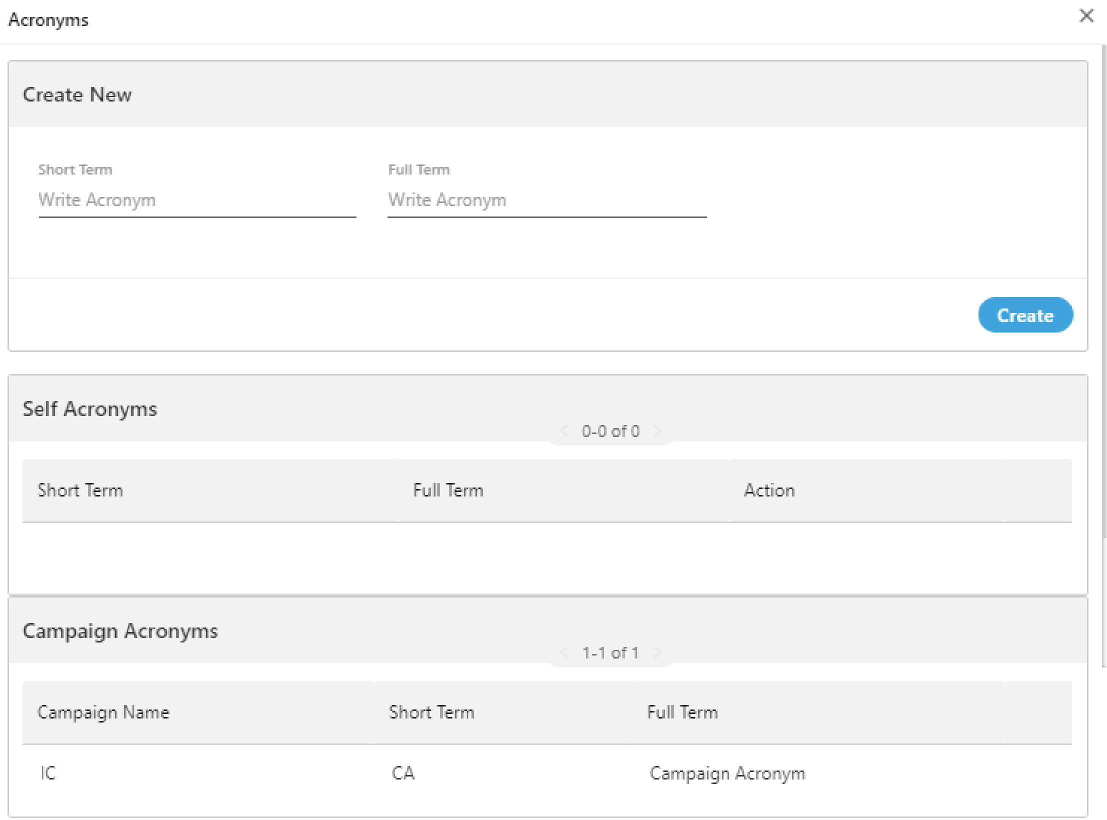


Figure: Acronyms

On this page, the agent can create his acronyms which are only visible to him, and he can use them only. Perform the following steps to create the Self-Acronyms.

A. Enter the short term in "Short Term" text area.

B. Provide the full name corresponding to the short term in the "Full Term" text area.

C. Click "Create" button.

Agent can delete his created acronyms but he does not have the option to edit them.

Select an acronym and click icon to delete it. A confirmation pop-up comes up.

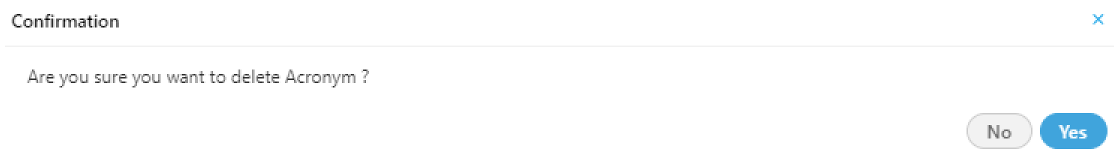


Figure: Delete Acronyms

Click "Yes" to confirm the deletion process else click "No".

The campaign level acronyms cannot be deleted from here. They can only be managed by the supervisor.

5. **Keyboard Shortcuts:** This feature allows the Ameyo agent to see the list of keyboard shortcuts, through which the work of the agent can be reduced. Click “Keyboard Shortcuts” option from the list. The following modal is displayed.

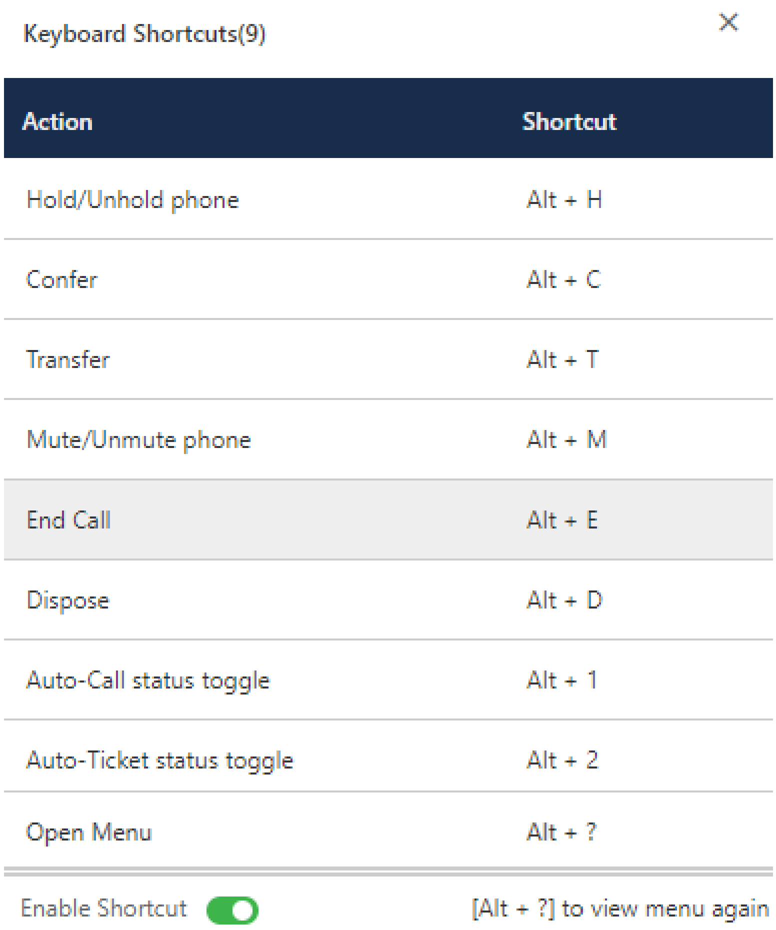


Figure: Keyboard Shortcut Modal

Following are the actions for which the shortcuts are listed in this modal:

4.

- **Hold/Unhold Phone:** Press the “Alt” key and “H” key together to access this shortcut.
- **Confer:** Press the “Alt” key and “C” key together to confer any call.
- **Transfer:** Press “Alt” and “T” key together to transfer any call.
- **Mute/Unmute Phone:** Press “Alt” and “M” key together to mute or unmute any ongoing call.
- **End Call:** Press “Alt” and “E” key together to end the call.
- **Dispose:** Press “Alt” and “D” key together to dispose of any call.
- **Auto-Call Status Toggle:** Press “Alt” and “1” key together to change the status of the auto-call.
- **Auto-Ticket Status Toggle:** Press “Alt” and “2” key together to change the status of the auto-ticket assignment.
- **Open Menu:** Press “Alt” and “?” keys together to open the keyboard shortcut modal.

Click switch to disable the Keyboard Shortcuts.

Click switch to enable the Keyboard Shortcuts. By default, they are enabled for every user.

The above shortcuts can not be customized, they are fixed.

5. **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.

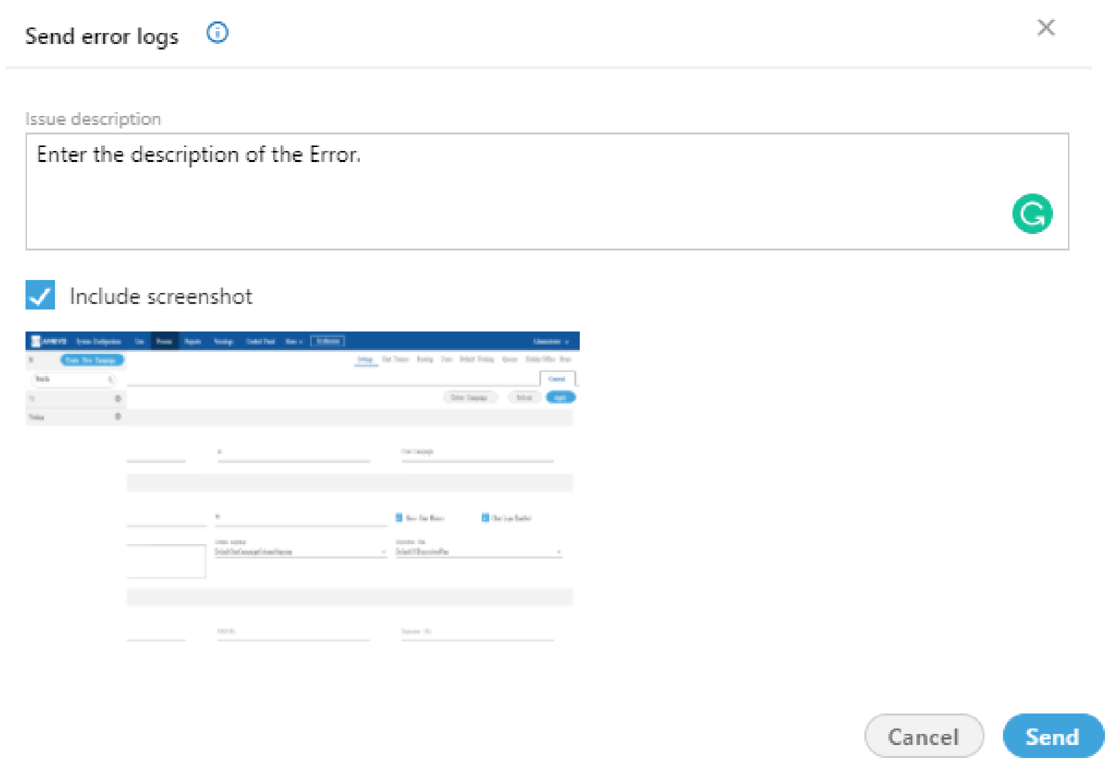


Figure: "Send Error Logs" Option

6. **Logout:** Click "Logout" to logout from the Ameyo. Once you click logout, all the services will stop, and agent redirects again to the login page.

   Logout option will be disabled when the user is either on the call or having the conversation with customer over the chat. Logout option will only be available after the conversation will be terminated and call or chat will be disposed successfully.

7. **Last Login:** It shows the last date and time of the agent when the account has been logged in by agent.

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8. **Working Mode Selection:** If the administrator has configured the working mode selection, then the agent can view the selected working mode (shown in red-box of the following screenshot).

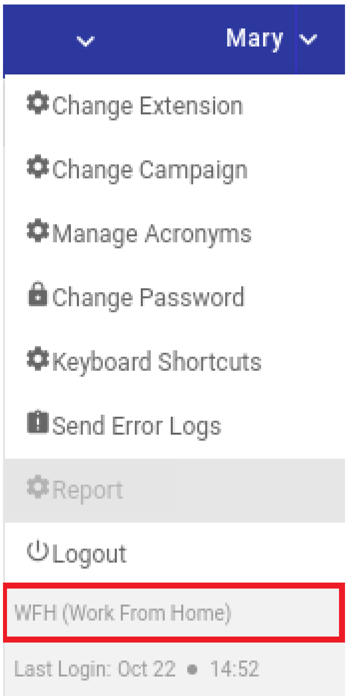

Figure: Working Mode Status Visibility at Agent's Account Menu

9. **Last Performed Activity:** The agents can view their last activity time through the account menu with the "Last activity since" data point. It shows the total time from which the agent has not performed any activity. The activity performed by the agent is according to the session. It means that the activities performed by the agent will be saved for only the current session, irrespective of the campaign. There is a possibility that an agent is assigned in multiple campaigns, in such a case, the activity performed by the agent in any campaign will be treated as an activity.

   The following work will be considered as an activity of the agent.

   - Changing status, that is, all kind of Break is considered as an activity.
   - Picking up the chat/ticket/call is considered as an activity
   - Disposition on the chat/ticket/call is considered as an activity
   - Call Hold is considered as an activity

   The agent can hover its mouse on "Last activity since" to view the performed activity on the agent's console.

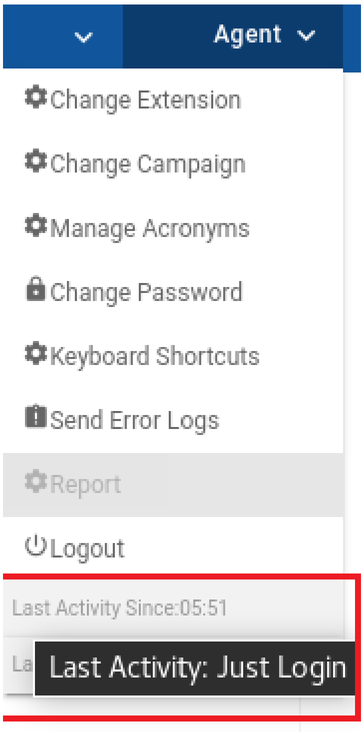

Figure: Agent's Activity in Account Menu

- On page reload, the activity time count will reset to 0.
- This functionality is only for the WebApp application. It is not present for the toolbars as of now.

12. Logout from Ameyo

The agents are supposed to logout from the Ameyo application once their respected shift is completed. Agents need to click on their name (top right corner) to access a menu..

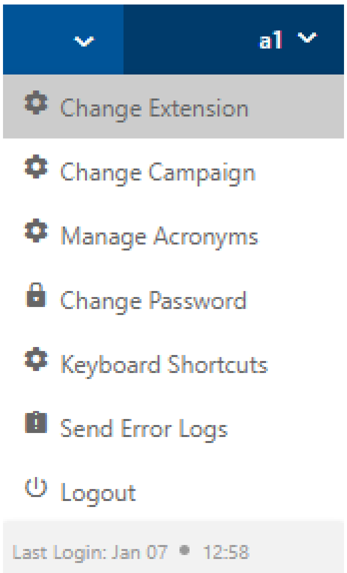

Figure: Logout from Ameyo

Click "Logout" to logout from the system.