

4_12_Vocie_Admin

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1. Document Versioning

Version	Date	Purpose	Author
4.12.1-VAdM	08-July-2021	First Draft	Nisha Negi

2. Ameyo Voice-Admin Login

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

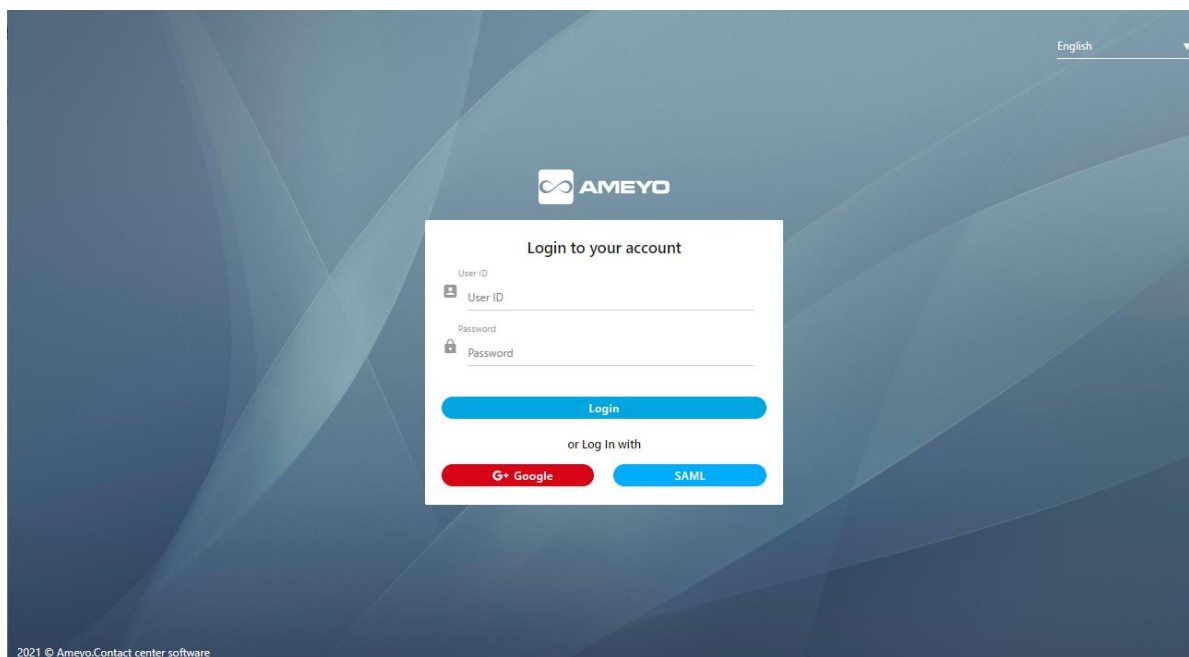


Figure: Login Screen

Voice-Admin can perform the following two tasks on the login page.

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

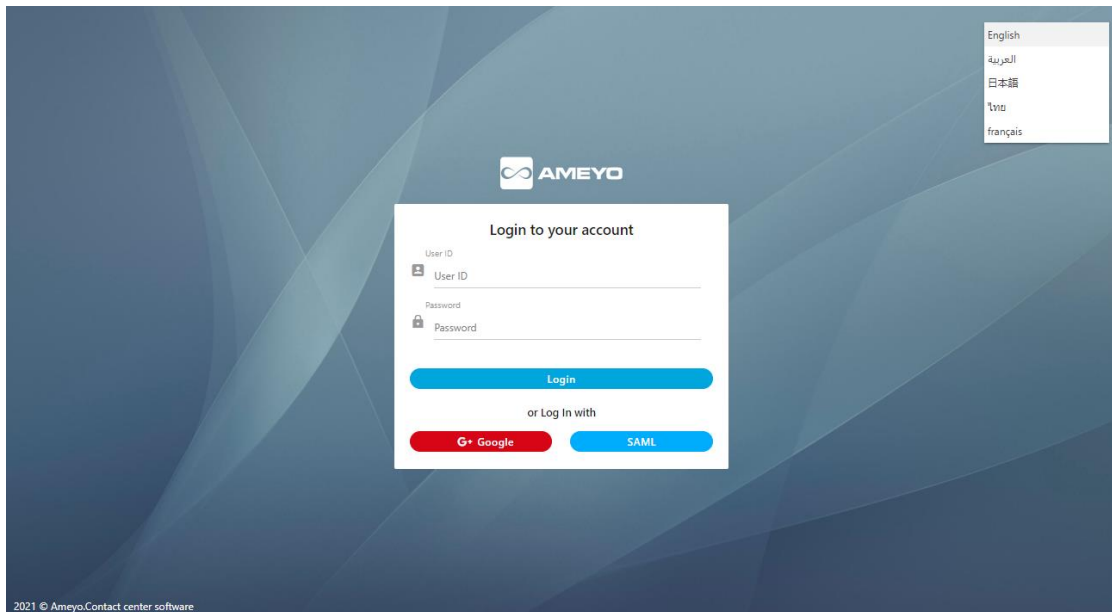


Figure: Change Language on Login Screen

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

Following languages are available for Ameyo.

- A. English
- B. French
- C. Thai
- D. Arabic
- E. Japanese
- F. Deutsch
- G. Turkish

For more information on Ameyo supported languages, [click here](#).

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

2. Login to Ameyo.

- A. **Normal Login:** The Voice-Admin needs to enter the "User ID" and "Password" for Ameyo and click "**Login**".
- B. **Login with SAML (Licensable):** Security Assertion Markup Language(SAML) is an XML-based framework for ensuring that transmitted communications are secure. SAML can be be utilized to exchange authentication information, allowing single sign on capabilities for Web services. For example, If a customer has an Identity Provider (IDP) and requires that authentication of users should be done using the same IDP, an integration between Ameyo and the IDP will be done to allow single sign on through SAML. Significance of using SAML is that users don't have to use Ameyo user credentials to login, instead the users log in using single sign on with the integrated IDP. Click "SAML" to login with your SAML Account hosted at your IDP (Identity Provider).
- C. **Google (Licensable):** The Voice-Admin can also login using its Google account. The businesses have to configure the Ameyo System using their Google Business (G Suite) Account to allow only their staff to login.

After the Voice-Admin logs successfully, "**System**" tab is displayed in the browser.

3. Voice-Admin Console

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

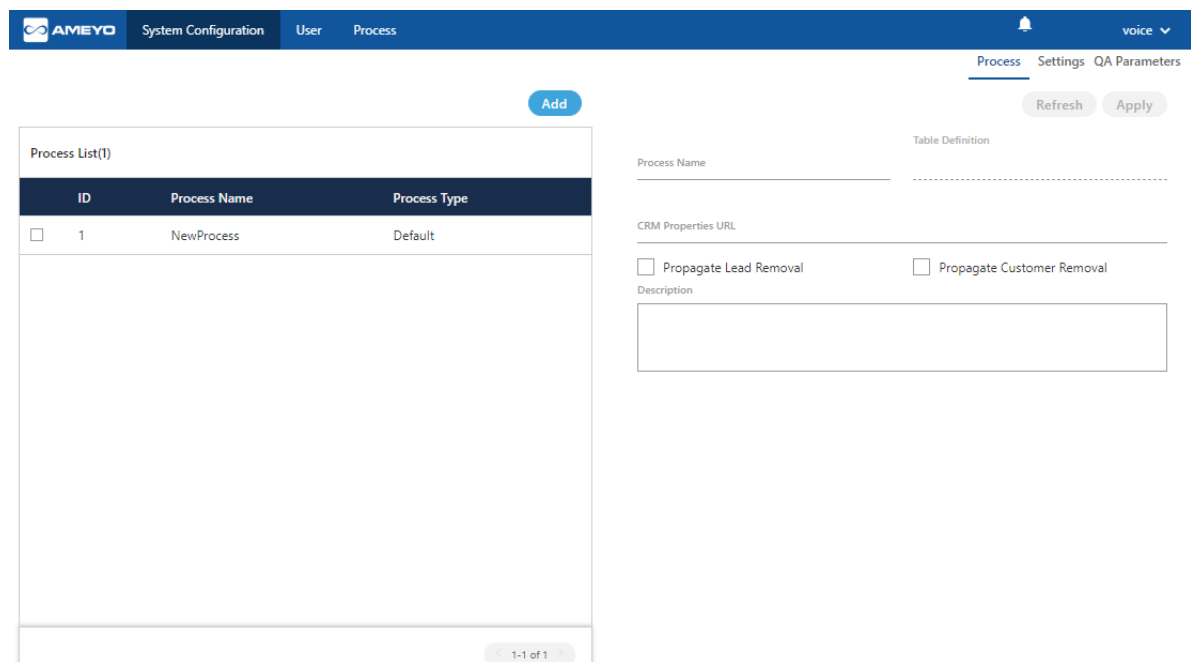


Figure: Ameyo Voice-Admin Workbench

3.1 System Tab

Voice-Admin can navigate below mentioned tabs. Click the links to know more about the same.

- [System Tab](#)
 - [System Configuration](#)
- [User](#)
- [Process](#)

4. Quick Startup Guides to setup the Different Campaigns

4.1 Quick Startup Guides

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

- [Quick Startup Guide for Interactive Voice Application Campaign](#)
- [Quick Startup Guide for Outbound Voice Campaign](#)
- [Quick Startup Guide for Voice Blast Campaign](#)

4.2 Quick Startup Guide for Interactive Voice Application Campaign

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

- [Configure System Settings](#)
- **Create Mapping Policies:** It can be done through administrator user account
- [Create QA Parameters](#)
- [Create Process](#)
- [Create Users \(Mandatory\)](#)
- [Create an Interactive Voice Application Campaign](#)
- [Configure Blended Campaign Settings \(As per requirement\):](#) If you want to force the user to select more than one campaigns during logon.
- [Manage Dispositions \(Optional\)](#)

- [Manage Holiday/Office Hours \(Optional\)](#)
- [Create Skills \(Optional\)](#): If you want to perform skill-based routing.
- [Manage Voicemail Prompts at System Level \(Optional\)](#)
- [Configure Interactive Voice Application Campaign Settings](#)

4.3 Quick Startup Guide for Outbound Voice Campaign

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

- [Configure System Settings](#)
- [Create QA Parameters](#)
- [Create Process](#)
- [Create Users \(Mandatory\)](#)
- [Create an Outbound Voice Campaign](#)
- [PACE State \(As per requirement\)](#): If you want to use PACE along with Predictive Dialer.
- [PACE Rule \(As per requirement\)](#): If you want to use PACE along with Predictive Dialer.
- [Configure Blended Campaign Settings \(As per requirement\)](#): If you want to force the user to select more than one campaigns during logon.
- [Manage Dispositions \(Optional\)](#)
- [Manage Holiday/Office Hours \(Optional\)](#)
- [Create Skills \(Optional\)](#): If you want to perform skill-based routing.

- [Manage Voicemail Prompts at System Level \(Optional\)](#)
- [Configure Outbound Voice Campaign Settings](#)

4.4 Quick Startup Guide for Voice Blast Campaign

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

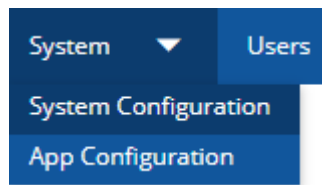
- **Create Table Definition (Optional)**: It can be done through administrator user account.
- **Create Table Column Mapping (Mandatory)**: If you want to add the searchable custom fields in Customer Information) It can be done through administrator user account: It can be done through administrator user account.
- **Create Table Filters to filter Customers (Optional)**: It can be done through administrator user account
- [Configure System Settings](#)
- **Create Mapping Policies**: It can be done through administrator user account
- [Create QA Parameters](#)
- [Create Process](#)
- [Create Users \(Mandatory\)](#)
- [Create a Voice Blast Campaign](#)
- [PACE State \(As per requirement\)](#): If you want to use PACE along with Predictive Dialer.
- [PACE Rule \(As per requirement\)](#): If you want to use PACE along with Predictive Dialer.
- [Configure Blended Campaign Settings \(As per requirement\)](#): If you want to force the user to select more than one campaigns during logon.

- [Manage Dispositions \(Optional\)](#)
- [Manage Holiday/Office Hours \(Optional\)](#)
- [Create Skills \(Optional\)](#): If you want to perform skill-based routing.
- Manage Exclusions at System Level (Optional)
- [Manage Voicemail Prompts at System Level \(Optional\)](#)
- **[Create and Manage Rules \(Optional\)](#)**: It can be done through administrator user account.
- **[Configure Call Manager \(Mandatory\)](#)**: It can be done through administrator user account.
- [Configure Voice Blast Campaign Settings](#)

5. System Tab

5.1 System Tab

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



System Menu

The App Manager is a Licensable feature and can be enabled only after installing license for the same. Contact ameyo team for further information.

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

- [System Configuration](#)
- **App Configuration:** Please refer to "App Configuration" document to know more about the same.

5.2 System Configuration

5.2.1 System Configuration

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

- [Process](#)
- Settings

- [QA Parameters](#)

5.2.1.1 CRM Configuration

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

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

5.2.2 Process in System Configuration

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

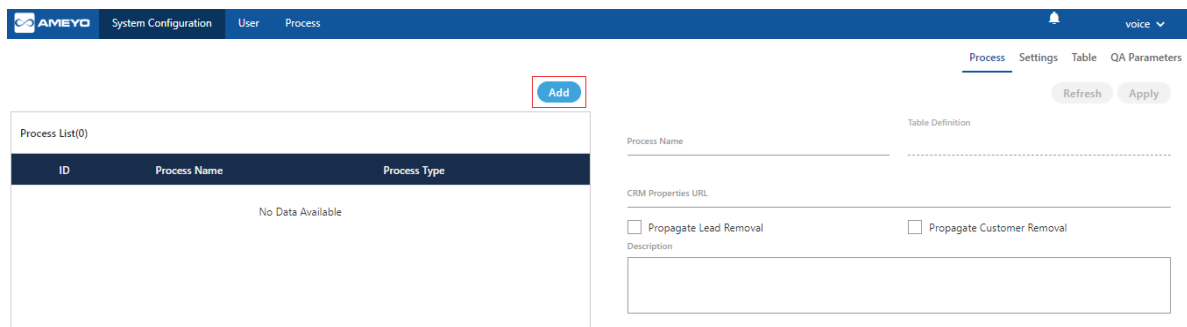


Figure: Process Tab

5.2.2.1 Create a Process

Perform the following steps to create a process.

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



Add Process [Close]

Process Name: _____

Process Type: Default [v]

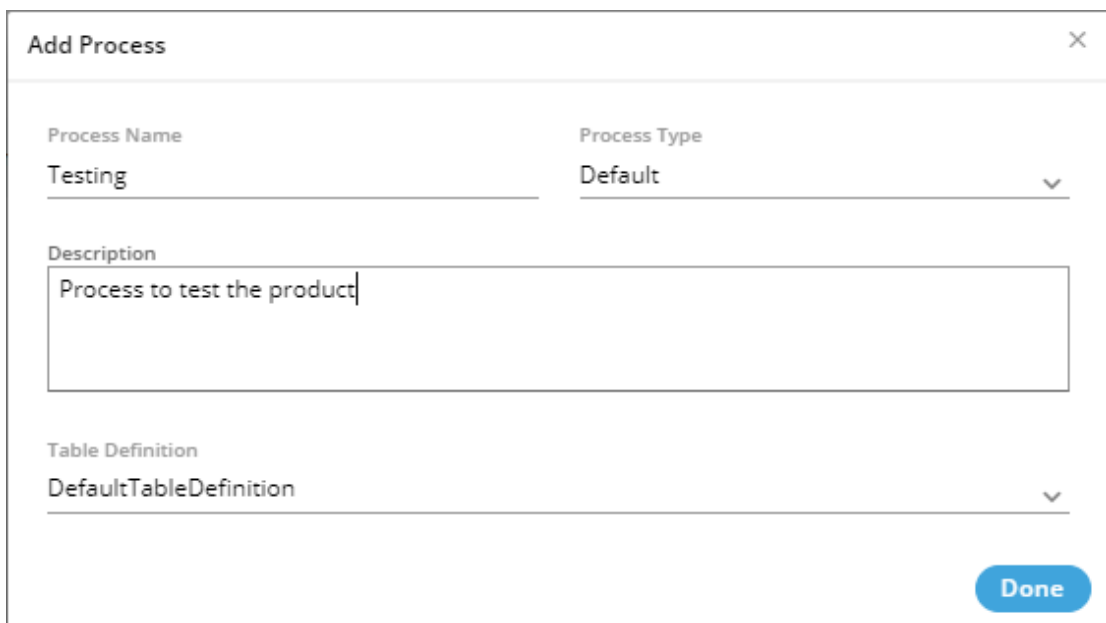
Description: [Empty text area]

Table Definition: DefaultTableDefinition [v]

[Done]

Figure: Create Process

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



Add Process [Close]

Process Name: Testing

Process Type: Default [v]

Description: Process to test the product

Table Definition: DefaultTableDefinition [v]

[Done]

Figure: Creating a Process

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

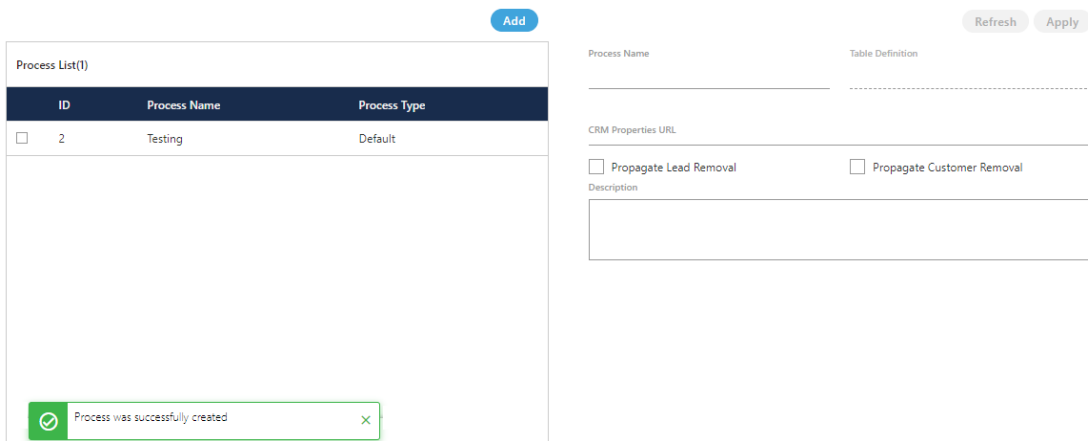


Figure: Created a Process

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

5.2.2.2 Modify a Process

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

1. Select the process in the left side section. The fields (such as Process Name and Description) will be populated in the right side section.

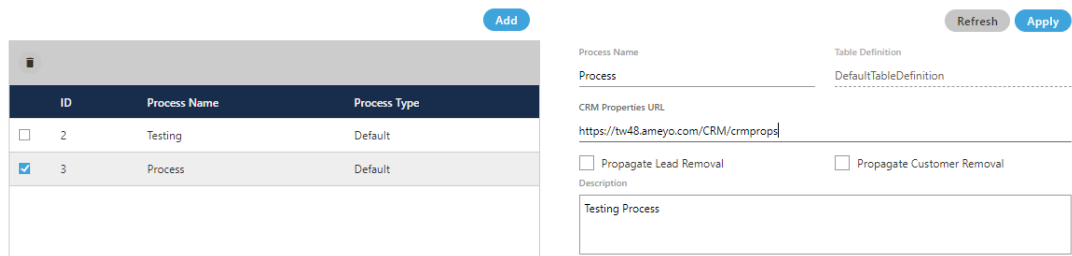


Figure: Modify a Process

2. You can change the Process Name here as well. Provide the new name of the process in the Process Name field.

3. You have to provide the inputs for the following fields.
 - A. **CRM Properties URL:** User can enter the the URL of the CRM that needs to be configured for a particular process. For example, the following URL can be added for a local AppServer.

```
http://<IP_Address_Domain_AppServer>:8786/<CRM_Name>/crmp  
rops
```

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

4. If VAPT setup is configured in Ameyo then the CRM URL will be:
http://<IP_Address_Domain_AppServer>:8786/<CRM_Name>/crmprops.php
Replace **http** with **https**, if CRM is configured on secure setup website.

- A. **Propagate Lead Removal:** If supervisor deletes any lead from Ameyo, then all the numbers get deleted from ameyo database, but they remain available in the CRM database. If you want to delete those numbers from CRM database as well, then enable Propagate Lead Removal checkbox.
 - B. **Propagate Customer Removal:** If supervisor deletes any customer's number from the uploaded lead, then it gets removed from ameyo database but it remains available in the CRM database. If you want to delete the number from CRM database also, then enable Propagate Customer Removal checkbox.
5. Click "Apply" to apply the changes.
Whereas, click "Refresh" button to discard the changes.

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

5.2.2.3 Delete a Process

Voice-Admin can delete any process by following below steps.

1. Select the process that needs to be deleted.

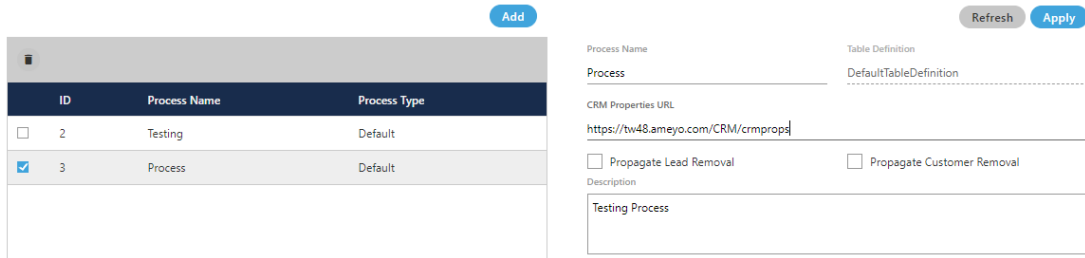


Figure: Delete Process

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

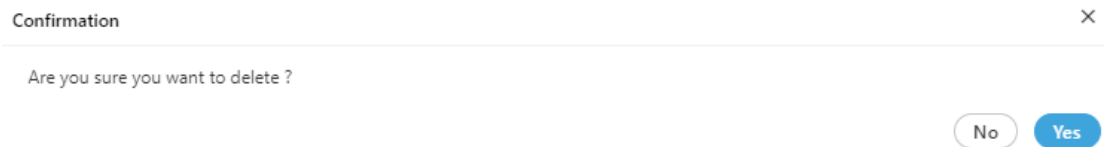


Figure: Confirmation Message

3. Click "Yes" to delete the process.
Click "No" to not delete the process.

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

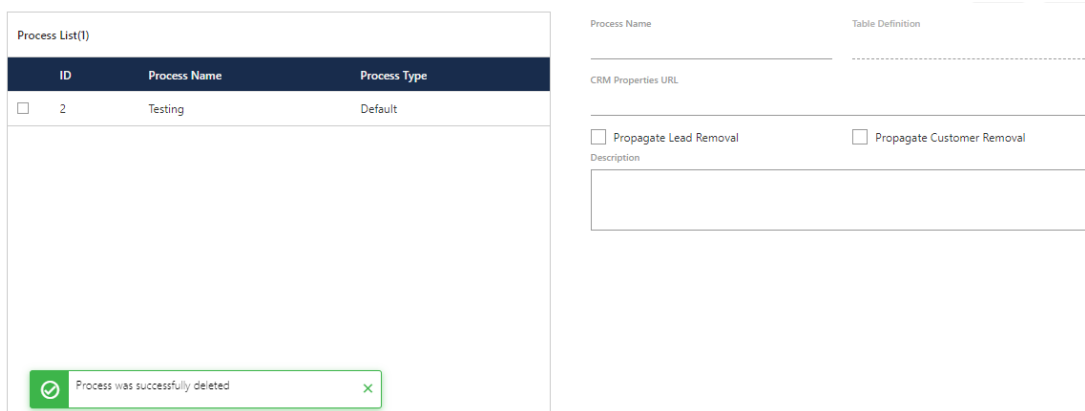


Figure: Deleted a Process

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

5.2.3 System Settings Tab

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

Figure: Settings Tab → System Settings

1. **Knowledge Base Settings:** The Voice-Admin can define the knowledge base page URL here. Supervisor, agents, and other users will view this page on the Home screen of their workbenches.
Modify the value of "Knowledge Base URL" field. It's default value is given below.
`http://${serverName}:${serverPort}/`
2. **After Login Behaviour :** Using this feature, the Voice-Admin can define the after login behaviour. It contains the following two options. Any one of them can be selected only.

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



After Login Behaviour

Active System User

Auto Available

Figure: System Auto-Available Option

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



After Login Behaviour

Active System User

Auto Available

Figure: User Available Option

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

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



Auto Answer

Enable Auto Answer

Internal Chat

Enable Internal Chat

Figure: Auto-Answer and Internal Chat options

- (Licensable) Internal Chat :** The Voice-Admin can enable or disable the internal chat. After enabling it, the Supervisor, Agents, and other users can use the internal chat to communicate with each other. A static chat icon will be displayed on the bottom right corner of the interface of every user. This feature is licensable, hence for further information on the same, contact Support team of Ameyo.
- CRM Integration:** After implementing the OAuth for Single Sign-On with Zoho Apps (Zoho CRM and Zoho Desk), the Voice-Admin now have to authorize the access to the connecting Zoho App through the System Configuration in the Voice-Admin Console. Once done, the Call Start Time and Call Duration Time will recorded in the database and displayed on the User Interface.
- (Licensable) Break Reasons:** Voice-Admin can add the break reasons for the contact center. Created break reasons will be applied at system level and same will be visible to agents on Ameyo Web Access. While going on break, agents can select the respective break reason.

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

Break Reason Configuration	
<input type="checkbox"/>	Lunch
<input type="checkbox"/>	Snacks
<input type="checkbox"/>	Training
<input type="checkbox"/>	Unavailable

Figure: Break Reason Configuration

Perform following steps to add break reason.

5.
 - A. To add a break reason, click on "**Add**" button.
 - B. Enter the name of break reason.

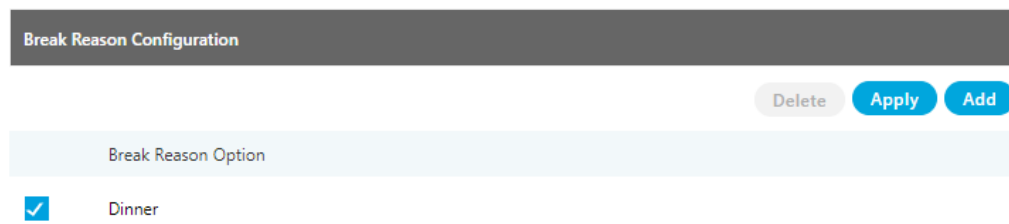


Figure: Add a Break Reason

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

Perform the following steps to delete a break reason.

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

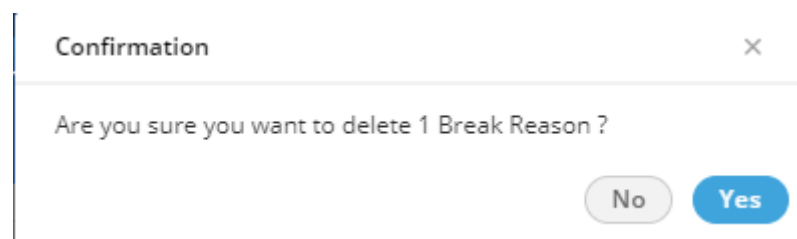


Figure: Asking to delete a Break Reason

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

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

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

5.2.4 (Licensable) QA Parameters in System Configuration

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

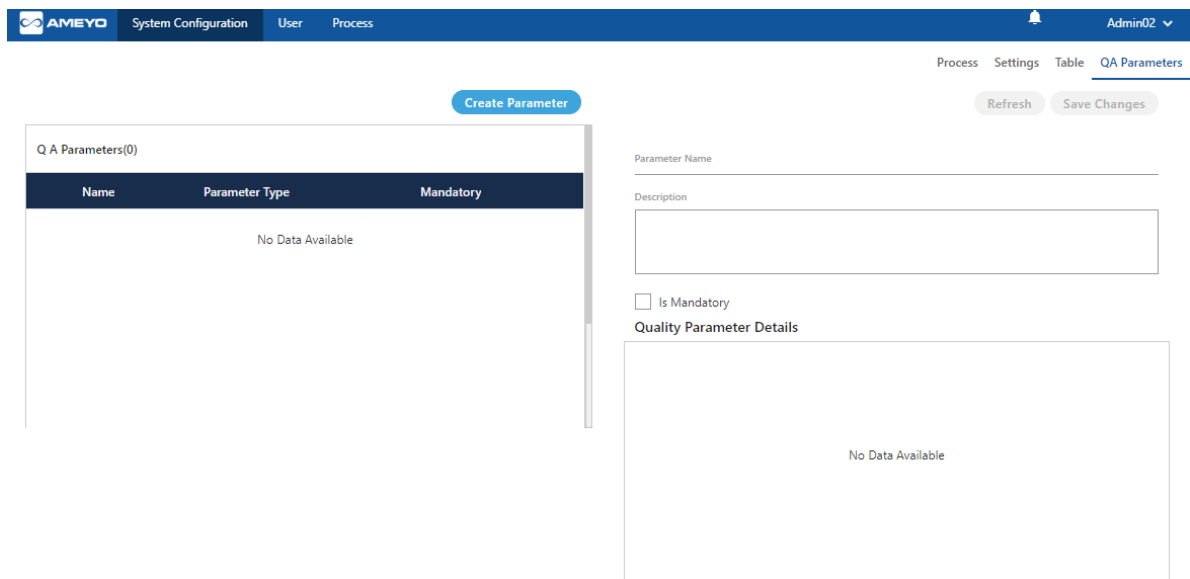


Figure: Quality Parameter Tab

5.2.4.1 Create Quality Parameter

Voice-Admin can create new parameter by performing the following steps.

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

Create Quality Parameter ✕

_____ Boolean ▼

Description Is Mandatory

Quality Parameter Details

Value	Score
true -----	1 _____
false -----	1 _____

Cancel Add

Figure: Create Quality Parameter

2. **Parameter Name:** Enter the name of parameter.
3. **Description:** Enter the description of parameter.
4. **Is Mandatory:** Check the check box if this parameter has to be made mandatory, which means the Analyst or Supervisor has to rate the call.
5. **Parameter Type:** Select the parameter type from the drop-down menu. After selecting a value, the interface gets changed. It contains the following options.

- A. **Boolean:** Select it to create a boolean-based Quality Parameter, whose value can be given in True or False. After selecting the boolean, provide the values for true and false.
- B. **Multiple:** Select it to create a Quality Parameter, which can contain multiple vaules.

Create Quality Parameter ×

Parameter Name:

Parameter Type: ▼

Description:

Is Mandatory

Quality Parameter Details + Add Parameters Details

Value	Score	Delete
No Data Available		

Figure: Multiple-based Quality Parameter

Perform the following steps.

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

Create Quality Parameter ✕

Parameter Name	Parameter Type
Audio	Multiple ▾
Description	<input checked="" type="checkbox"/> Is Mandatory
<input type="text"/>	

Quality Parameter Details [+ Add Parameters Details](#)

Value	Score	Delete
<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	

Cancel Add

Figure: Add Details of Multiple-based Quality Parameter

- II. Provide the value and score. For example, the value can be in text format and the score can be in numeric format such as "Poor" can be the value and "1" can be its score.
- III. Click "+ Add Parameter Details" link again to add one more row containing value and score.

Create Quality Parameter ✕



Parameter Name

Description

Parameter Type
Multiple ▼


Is Mandatory

Quality Parameter Details + Add Parameters Details

Value	Score	Delete
<input type="text" value="Good"/>	<input type="text" value="5"/>	
<input type="text" value="Poor"/>	<input type="text" value="2"/>	
<input type="text"/>	<input type="text"/>	

Cancel Add

Figure: Multiple Values in a Quality Parameter

- IV. To delete a parameter detail, click  icon.
- C. **Comment:** Select it to create a Quality Parameter, which can accept and store comments about the quality of customer communication.

Create Quality Parameter ×

Parameter Name	Parameter Type
Audio	Comment
Description	<input checked="" type="checkbox"/> Is Mandatory
Add comments here	

No Data Available

Cancel Add

Figure: Comment-based Quality Parameter

- D. **Range:** Select it to create a range-based Quality Parameter. You can specify the minimum and maximum range.

Create Quality Parameter
✕

Parameter Name

Parameter Type

Description

Add comments here

Is Mandatory

Quality Parameter Details

Value	Score
min	1
max	2

Cancel Add

Figure: Range-based Quality Parameter

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

Following screenshot shows newly created quality parameters.

Create Parameter

Q A Parameters(4)				
	Name	Parameter Type	Mandatory	
<input type="checkbox"/>	Multiple	Multiple	true	
<input type="checkbox"/>	Boolean	Boolean	true	
<input type="checkbox"/>	Comment	Comment	true	
<input type="checkbox"/>	1Range	1Range	true	

Refresh
Save Changes

Parameter Name

Description

Is Mandatory

Quality Parameter Details

No Data Available

Figure: List of QA Parameter

7. Select the QA Parameters to view its details.

5.2.4.2 Change Priority of Quality Parameters

Each Quality Parameter has **↑ ↓** in the list. The Voice-Admin can click **↑** to increase the priority for a Quality Parameter and **↓** to down its priority.

5.2.4.3 Modify Quality Parameter

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

Name	Parameter Type	Mandatory
<input type="checkbox"/> ↑ ↓ Multiple	Multiple	true
<input checked="" type="checkbox"/> ↑ ↓ Boolean	Boolean	true
<input type="checkbox"/> ↑ ↓ Comment	Comment	true
<input type="checkbox"/> ↑ ↓ 1Range	1Range	true

Parameter Name	
Boolean	
Description	
<input type="text"/>	
<input checked="" type="checkbox"/> Is Mandatory	
Quality Parameter Details	
Value	Score
true	1
false	0

Figure: Modify QA Parameter

You can modify the following details.

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

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

5.2.4.4 Delete Quality Parameter

The deleted Quality Parameter cannot be restored.

Perform the following steps to delete a quality parameter.

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

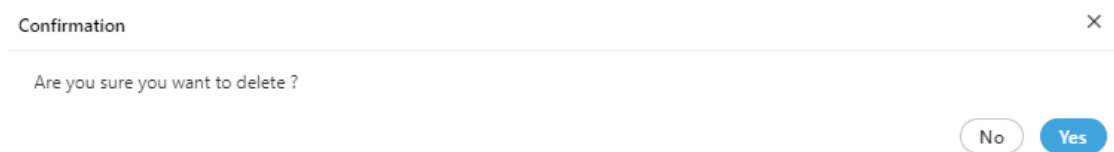


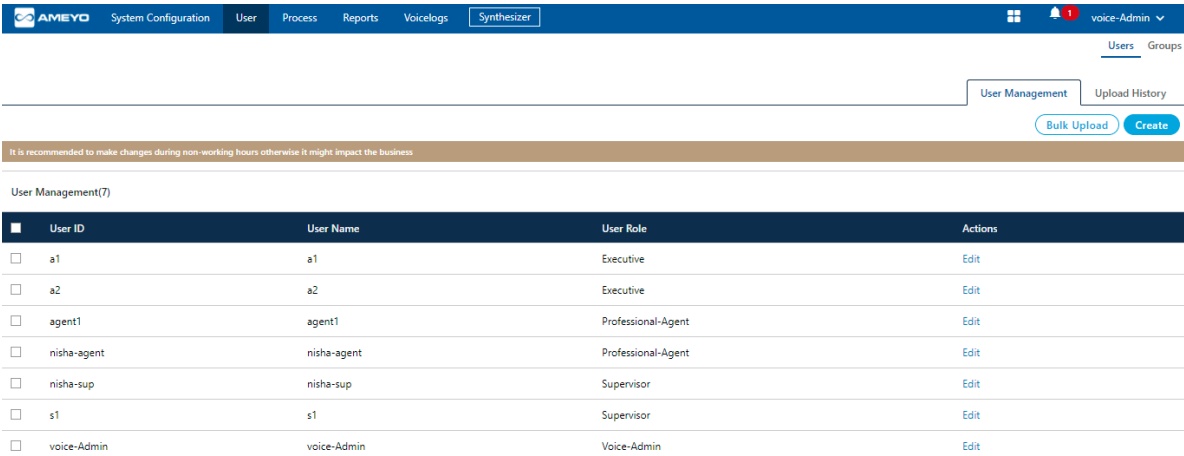
Figure: Delete QA Parameter

3. Click "Yes" to delete the quality parameter.
Click "No" to not delete the quality parameter.

6. Management of Users and Groups

6.1 Management of Users and Groups

The Voice-Admin can create new users and their groups from existing users of Ameyo system.



User ID	User Name	User Role	Actions
a1	a1	Executive	Edit
a2	a2	Executive	Edit
agent1	agent1	Professional-Agent	Edit
nisha-agent	nisha-agent	Professional-Agent	Edit
nisha-sup	nisha-sup	Supervisor	Edit
s1	s1	Supervisor	Edit
voice-Admin	voice-Admin	Voice-Admin	Edit

Figure: Management of Users and Groups

The Voice-Admin can perform the following steps from here.

1. **User Management:** This tab allows the Voice-Admin to create and manage the user configuration in Ameyo. [Know more...](#)
2. **Group Management:** This tab allows the Voice-Admin to create and manage the user groups in Ameyo. [Know more...](#)

6.2 Users

6.2.1 Users

The Voice-Admin can create, edit, and delete the users from here. The voice-admin can also view the history of bulk upload users.

The screenshot shows the 'User Management' tab in the Ameyo system. At the top, there is a navigation bar with 'System Configuration', 'User', 'Process', 'Reports', 'Voicelogs', and 'Synthesizer'. Below this, there are tabs for 'User Management' and 'Upload History', along with 'Bulk Upload' and 'Create' buttons. A warning message states: 'It is recommended to make changes during non-working hours otherwise it might impact the business'. The main content area is titled 'User Management(7)' and contains a table with the following data:

User ID	User Name	User Role	Actions
a1	a1	Executive	Edit
a2	a2	Executive	Edit
agent1	agent1	Professional-Agent	Edit
nisha-agent	nisha-agent	Professional-Agent	Edit
nisha-sup	nisha-sup	Supervisor	Edit
s1	s1	Supervisor	Edit
voice-Admin	voice-Admin	Voice-Admin	Edit

Figure: User Management

The voice-admin can perform the following steps from here.

1. **User Management:** This tab allows the voice-admin to create and manage the user accounts in Ameyo. [Know more...](#)
2. **Upload History:** This tab allows the voice-admin to view the user upload history. [Know more...](#)

6.2.2 User Management

The Voice-Admin can create new users and delete the existing users from Ameyo system.

This screenshot is identical to the one above, showing the 'User Management' tab in the Ameyo system with the same table of users and their roles.

Figure: User Management

6.2.2.1 Add User

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

Create User Cancel Save

General Information

User ID

System Role Administrator

User Name

Password

Confirm Password

Allowed Chat Extensions 0

Allowed Ticket Extensions 0

Phone Number

Email Id

Login Policy Verify Before Force Login

Figure: Add a User

Perform the following steps.

1. Enter the User ID, User Name in the provided text boxes.
2. Select the user role from the "System Role" drop-down menu. Here, you can use the search box to search for any role. It contains the following roles.

- By default, Professional Agent, Executive, and Supervisor can work in the Ameyo System, but it can be customized further for other user roles listed here. Please contact Services Team or On-site Engineer for more information.
- A user with Professional Agent role can login to one Chat, one Interaction and one Voice campaign. However in Blended Campaign, the user with Professional Agent role can select more than one voice campaign.
- A user with Executive Role can login to one chat, one Interaction, and more than one Voice Campaigns, even if they are not Blended.
- Blended Campaigns are preferred because it gives important to the inbound calls that helps in reducing the call drops.

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

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

- **Voice-Admin:** As the name suggests, the user with the Voice-Admin user rights is the head of all the Ameyo and is able to do everything in the system.
- **MAdmin:** MAdmin is the mini-Voice-Admin who has some privileges like the Voice-Admin but does not have the complete authorization like Voice-Admin.
- **Voice Admin:** All the voice related administration level works are allowed to be done by the Voice-Admin user.
- **Analyst:** The analyst is the user who analyses the complete work done by the agents.
- **Professional-Agent:** The professional agent is the user who is professional in handling multiple customers and their calls at the same time while assigned in the multiple campaigns.
- **Executive:** The executive is the person who is allowed to interact with the customer.

- **Supervisor:** The supervisor is the user who has the privileges to monitor the work of the agents which are assigned under him.
 - **UAM-Maker:** The UAM-Maker (User Access Manager) user has the privileges to create the users and assign them to their respective campaigns so that they can work accordingly.
 - **UAM-Checker:** The UAM-Checker (User Access Manager) has to approve the users created by UAM-Maker.
 - **Customer Manager:** The Customer Manager is used to run the Customer Manager API.
 - **Group Manager:** The combination of multiple voice agents is known as a group, and the group manager monitors the activity of the agents assigned in that group.
3. Enter the password in the provided text box and confirm the password by re-entering the same in "Confirm Password" text box.
 4. Enter the description about the user in the provided text area.
 5. Select the Allowed Interaction Extensions from the drop-down field.
Allowed Interaction Extension means that number of media interactions that is chat, mails, social media etc. can an Agent handle.
 6. Select the number of Ticket Extensions which a user can handle at a time.
 7. To enable E-mail ID for user check the checkbox provided and enter the E-mail ID of the user in the textbox.
 8. **Phone Number:** The voice-admin can provide the phone number of the agent here.
 9. **Login Policy:** Select the Login policy from the provided drop-down box.
 10. Click "Save" to add the user.

11. Click "Cancel" to discard the changes.

6.2.2.2 Modify User

Voice-Admin can modify the general information of user and also change different privileges given to that particular user. To edit a particular user, select that user by checking the checkbox provided and click on edit option which is there in front of the name of that user. It shows the following pop-up.

The screenshot shows a 'Modify User' pop-up form for user 'a1'. The form is organized into three main sections:

- General Information:** Contains fields for User ID (a1), System Role (Executive), User Name (a1), Password, Confirm Password, Allowed Chat Extensions (3), Allowed Ticket Extension (15), Login Policy (Verify Before Force Login), and Phone Number.
- After Login Behaviour:** Includes a checkbox for 'Auto Available'.
- System Masked Privileges:** Includes checkboxes for 'Set autocal status', 'Modify Campaign', 'Transfer Call', and 'Confer Call'.
- Campaign Masked Privileges:** Includes checkboxes for 'Manual Dial', 'Transfer Call', 'View disposition of a call', 'Confer Call', 'Listen to self campaign voice logs', and 'View Cancel Preview'.

Figure: Modify a User

Following information can be modified.

1. **General Information:** Under this category, the following fields can be modified.

- A. System Role
- B. User Name
- C. Password
- D. Allowed Chat Extensions

- E. Allowed Ticket Extensions
 - F. Check or uncheck "Email ID" field
 - G. Add, modify, or delete Email Address
 - H. Phone number of the user
 - I. Change Login Policy
2. **After Login Behaviour:** Here, you can check "Auto Available" to make the user auto-available after the login. Keep it uncheck to not make it auto-available after the agent login.
3. **System Masked Privileges:** The Voice-Admin can restrict the user from some actions related with system. Enable the checkboxes to restrict the user from the following restrictions.
- 2.
 - **Set autocal status:** It restricts the user to change the status of the auto call. It means that the user is not able to change the status of the auto call, the status set either by supervisor or Voice-Admin remains available.
 - **Modify Campaign:** It restricts the user to change the campaign after login to another campaign. It means that the user is not able to change the campaign even if the user is assigned in multiple campaigns. Now, if the user selects the campaign at the time of login remains available only. The option to change campaign for the user from the main menu remains disabled.
 - **Transfer Call:** It restricts the user to transfer the call.
 - **Confer Call:** It restricts the user to confer the call.
 - **End Call Allowed:** It is used to allow the user to end the call.

Tabs Visibility: The voice-admin can mask the tab visibility of the supervisor. Enable the checkboxes to restrict the user from the following restrictions.

The tabs visibility section is only visible for the supervisor user roles. If the voice-admin edit user role other than the supervisor, then this section will not be visible.

- **Monitor:** It restricts the user to view or working on the Monitor tab.
 - **Manage:** It restricts the user to view or working on the Manage tab.
 - **Reports:** It restricts the user to view or working on the Reports tab.
 - **Voicelogs:** It restricts the user to view or working on the Voicelogs tab.
3. **Campaign Masked Privileges:** The Voice-Admin can restrict some actions for particular user of the campaign (in which respective user is assigned) by simply checking the respective checkboxes.

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

- **Manual Dial:** If the user is masked for the Manual Dial feature then the user is not able to dial the call to any customer from that campaign manually(auto call does not have any impact of this feature). This feature is useful for the users of "Inbound" type campaigns.
- **View disposition of a call:** If this feature is enabled for any user, then that user is not able to view the dispositions for the call so that the user is not able to dispose off the call from the disposition list of dialer but the user is allowed to dispose the call from CRM in that campaign.
- **Listen to self campaign voice logs:** If the user is masked from this feature then the user is not able to listen to the voicelogs which are created from the calls handled by that user. The option to listen to the voicelogs remains unavailable for that user.
- **View Cancel Preview:** It masked the user to cancel the preview of the customer's details. It means that the user is not able to cancel the preview in the case of "Preview dialing" algorithm.
- **Transfer Call:** It restricts the user to transfer the call.

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

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

4. **Voice Mail Configurations (Licensable):** This feature is licensed. This tab will be only visible if voicemail license is procured at the center.

The Voice-Admin can enable Voicemail feature at system level is enabled by sliding the "voicemail" bar towards right. If this is not enabled, then voicemails will not be recorded. To enable sending the voicemails notifications, Voice-Admin needs to check the "Notification Email IDs" checkbox.

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

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

Rather, click "Cancel" to discard the changes.

6.2.2.3 Delete User

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

Perform the following steps to delete the user.

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

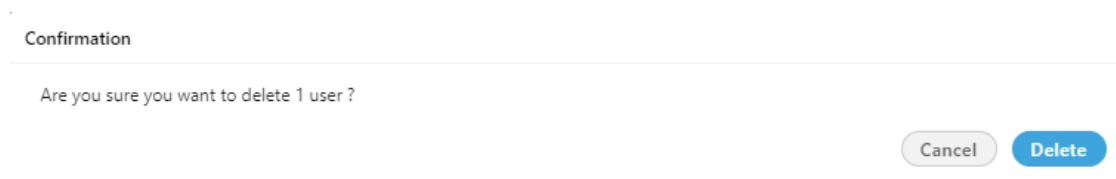


Figure: Warning before deleting a User

3. Click "Yes" to delete the user.

6.2.2.4 User Card

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

User ID	User Name	User Role	Actions
<input type="checkbox"/> a1	a1	Executive	Edit
<input type="checkbox"/> a2	a2	Professional-Agent	Edit
<input type="checkbox"/> Admin1	Admin1	Administrator	Edit
<input type="checkbox"/> Admin2	Admin2	Administrator	Edit
<input type="checkbox"/> Administrator	Administrator	Administrator	Edit
<input type="checkbox"/> Name: Administrator ID: Administrator	agent1	Executive	Edit
<input type="checkbox"/> analyst	analyst	Analyst	Edit

Figure: User Card

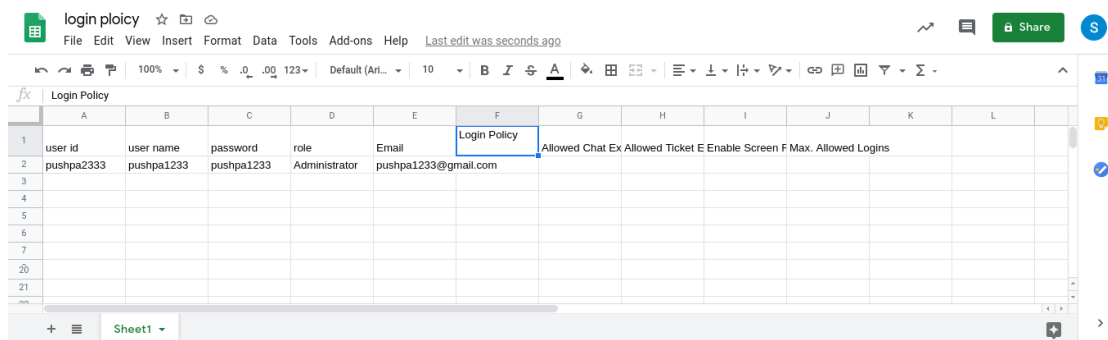
The user card contains the user-role, username, and userID.

6.2.2.5 [Bulk Upload](#)

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

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

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



The screenshot shows a Google Sheet titled "login ploicy" with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L
1	user id	user name	password	role	Email	Login Policy	Allowed Chat Ex	Allowed Ticket E	Enable Screen F	Max. Allowed Logins		
2	pushpa2333	pushpa1233	pushpa1233	Administrator	pushpa1233@gmail.com							
3												
4												
5												
6												
7												
20												
21												

Figure: CSV File

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

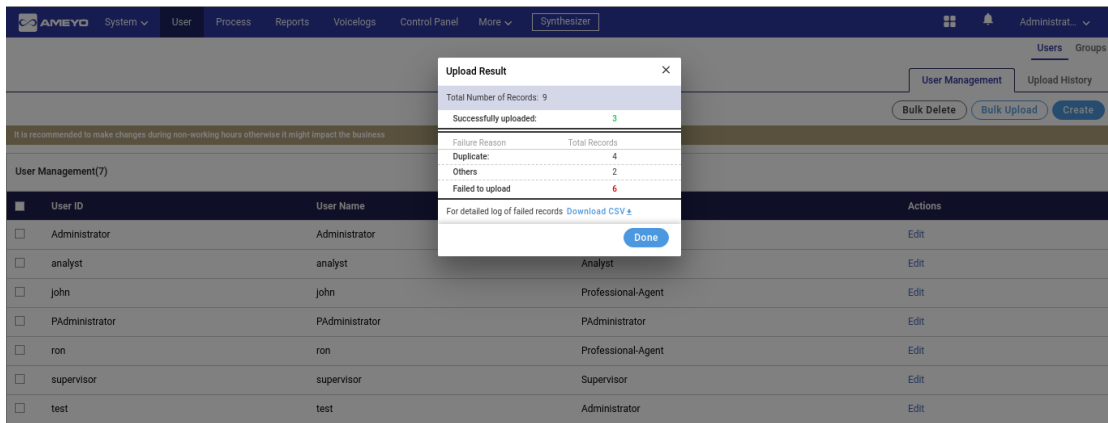


Figure: Modal shown for Bulk Upload of Users

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

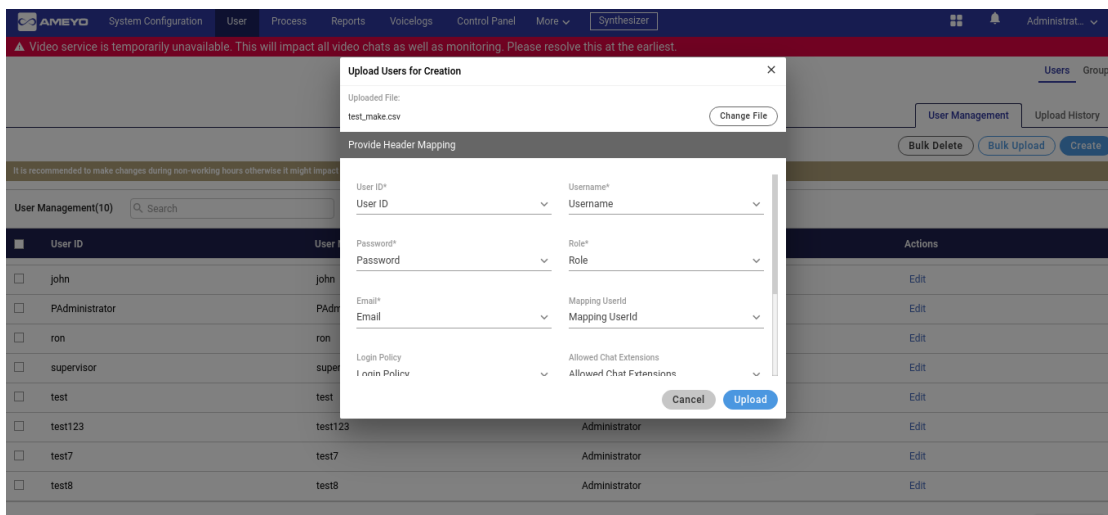


Figure: Mapping of User fields

- After the user creation step, the voice-admin can view the upload history of the users from the upload history tab.

6.2.3 Upload History

Once the upload process is completed, the voice-admin can view the history and the status of the successfully uploaded users from "Upload history" tab. In this tab, all the upload histories are present with their errors, if any. The upload history tab shows the count of the

total records uploaded using the CSV, count of failed records, and status of the file. It also shows the count of the remaining records that are left to be uploaded. Here the voice-admin also downloads the list of the failure records in the CSV file format. The "Exported Date and Last Exported" columns show the name and the time at which the Failed CSV record file has been downloaded.

Operation	Uploaded Records	Uploaded Failed	Uploaded Failed Log	File Status	Process Status	Process Result	Last Exported	Exported Date
Users Creation	13	13	Download CSV	InProgress	0 Remaining	--	--	--
Users Creation	14	13	Download CSV	Success	1 passed	--	--	--
Users Creation	4	3	Download CSV	Failed	3 out of 1 failed	Download CSV	Administrator	16:44
Users Creation	2	0	--	Failed	4 out of 2 failed	Download CSV	Administrator	15:49
Users Creation	3	0	--	Failed	7 out of 3 failed	Download CSV	--	--
Users Creation	2	0	--	Failed	4 out of 2 failed	Download CSV	--	--
Users Creation	4	3	Download CSV	Failed	2 out of 1 failed	--	--	--
Users Creation	2	0	--	Failed	4 out of 2 failed	Download CSV	--	--
Users Creation	2	0	--	Failed	2 out of 2 failed	Download CSV	sakshi2username	14:53
Users Creation	2	0	--	Failed	4 out of 2 failed	Download CSV	sakshi2username	14:28

Figure: Upload History Tab

6.3 Group Management

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

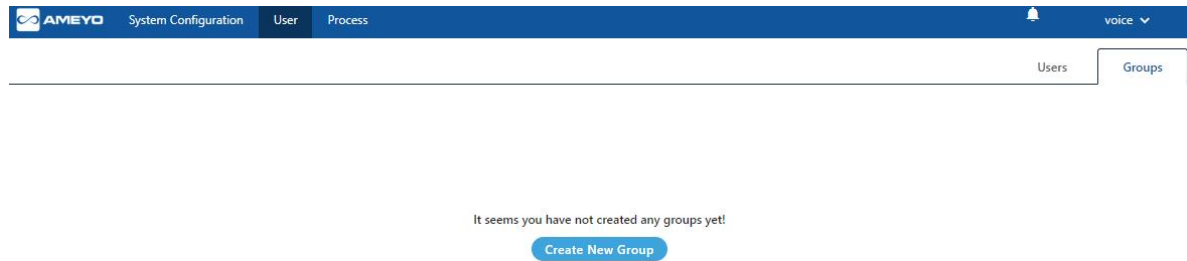


Figure: Group Management

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

6.3.1 Create New Group

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

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

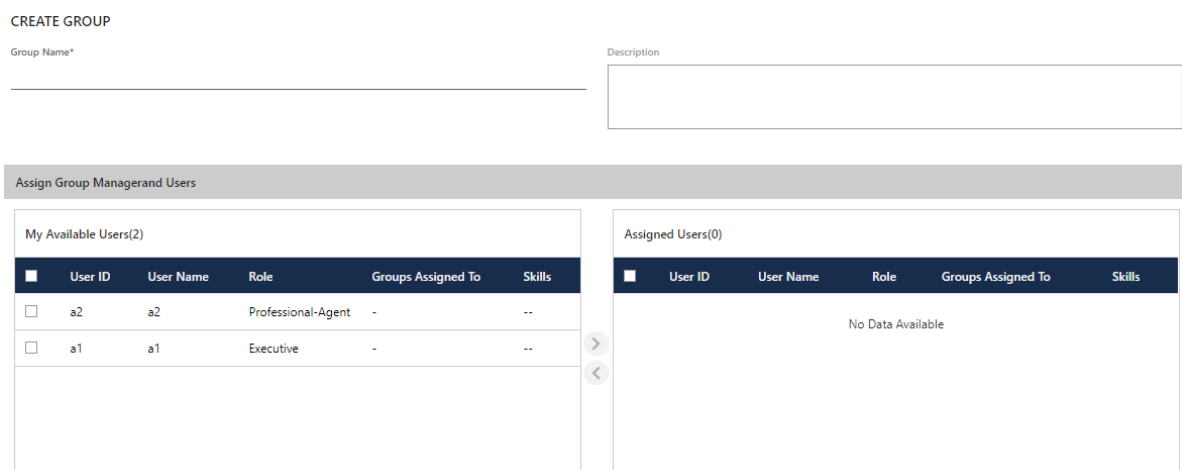



Figure: Create Group

Perform the following steps to create the group.

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

Assign at least one group manager user from the list. However, you can assign more than one group manager from here.

4. After providing all the information, click "Create" button.

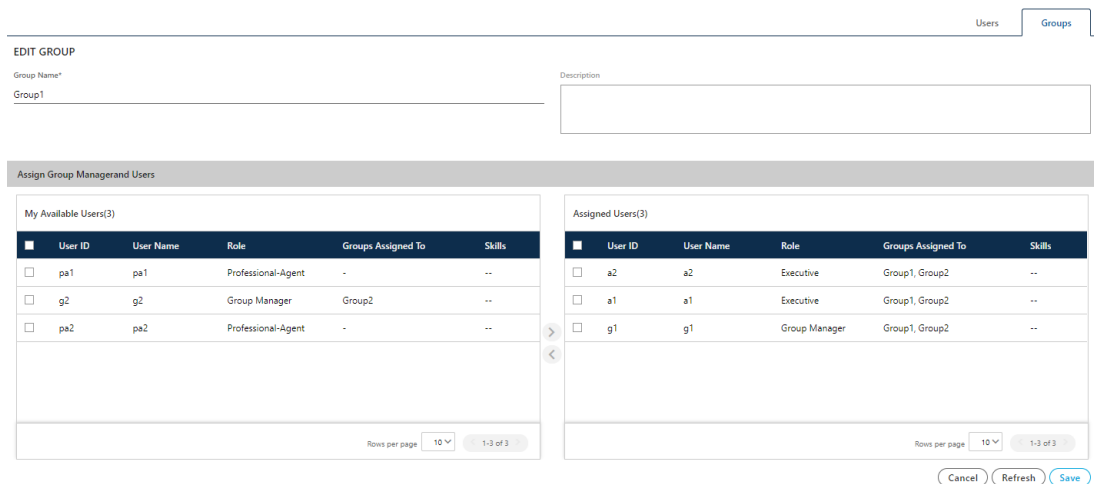



Figure: Sample Group

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

6.3.2 Edit the Group

Perform the following steps to edit the group.


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

Figure: Edit the Group

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

6.3.3 Delete Group


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

Figure: Delete Group

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

6.3.4 Assign Group Manager or Agents in Multiple Groups

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

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

7. Process Configuration

7.1 Process Tab

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

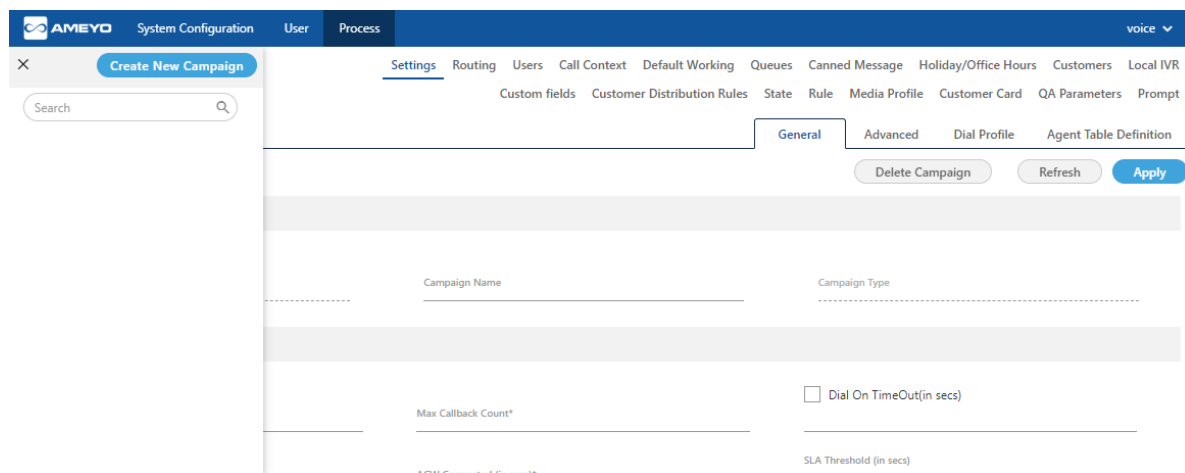


Figure: Process Tab

7.1.1 User Interface

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

1. **Left Navigation Section:** This is a fixed left side navigation bar that lets you browse through the different processes and campaigns. When it is not expanded or displayed, click ☰ icon to show it. When it is displayed, click "X" to close the sidebar. In this pane, you can click "Create New Campaign" button to create a new campaign and use the search box to search for any process or campaign.

2. **Tabs:** Following tabs are visible, by default, when you visit this page for the first time. However, the visibility and settings of these tabs actually depends upon the type of campaign you have selected.

- A. Settings
- B. Routing
- C. Users
- D. Call Context
- E. Default Working
- F. Queues
- G. Canned Message
- H. Holiday/Office Hours
- I. Customers
- J. Local IVR
- K. Custom Fields
- L. State
- M. Rule
- N. Media Profile
- O. Customer Card
- P. QA Parameters
- Q. Prompt

These tabs will be discussed in detail in Campaign Settings.

7.1.2 Operations

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

1. **Process Management:** You can click the name of any process in the Left Side Navigation Bar to access its settings, which can be configured. [Know more...](#)

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

2. **Campaign Management:** Here, the Administrator can create, edit, and delete the campaign. A campaign is required to setup the Contact Center.
 - A. [Create Campaign](#)
 - B. [Interface of Process Tab for Different Campaigns](#)
 - C. [Delete a Campaign](#)

7.2 Process Settings

7.2.1 Process Settings

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

The screenshot displays the Ameyo Voice-Admin interface. The top navigation bar includes 'AMEYO', 'System Configuration', 'User', 'Process', 'Reports', 'Voicelogs', and 'Synthesizer'. The left sidebar is open, showing a search bar and a list of campaigns: 'Process1', 'Chat Campaign', 'IC Campaign', 'Inbound Campaign', 'Outbound Campaign', 'Parallel Predictive', 'Voice Blast', and 'TestN'. The main content area shows the 'Process Settings' for 'Process1'. It includes a table with columns for 'Category Name' and 'Test'. The table has two rows, both with 'Test' in the 'Test' column. To the right of the table are form fields for 'Name', 'Category', 'Type', and 'Data Type'. Below these fields are four checkboxes: 'Mandatory On Creation', 'Searchable', 'Mandatory On Closure', and 'Non Editable'. There are also 'Refresh' and 'Update' buttons.

Figure: Process Settings

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

1. [Custom Fields](#)
2. [Customer Distribution Rules](#)
3. [PACE State](#)
4. [PACE Rule](#)
5. [Customer Card](#)

7.2.2 Custom Fields in Process Settings

7.2.2.1 Custom Fields Tab in Process Settings

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

Figure: Custom Fields

7.2.2.1.1 Cautionary Line

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

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

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

7.2.2.1.2 [Default Category of Custom Fields](#)

A default category of Custom Fields named "Default Category" will be created in the backend database while creating a Process. When the Voice-Admin will try to create the

Custom Fields without creating a Custom Category, then the Custom Fields will be assigned to "Default Category" by default. Hence, the Custom Fields assigned in "Default Category" will be displayed on the User Interface.

7.2.2.1.3 [Add a Category of Custom Fields](#)

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

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



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

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

7.2.2.1.4 [Manage Categories of Custom Fields](#)


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



Figure: Category Drop-down menu

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

- Add Custom Fields

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

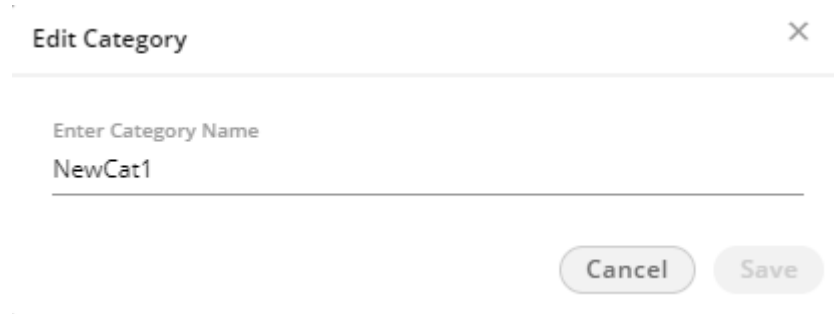



Figure: Edit Category

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

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

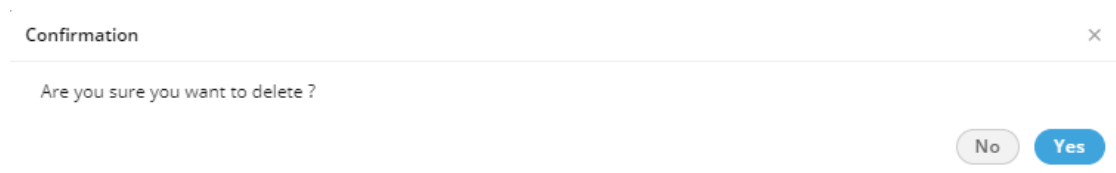


Figure: Deletion Confirmation Message

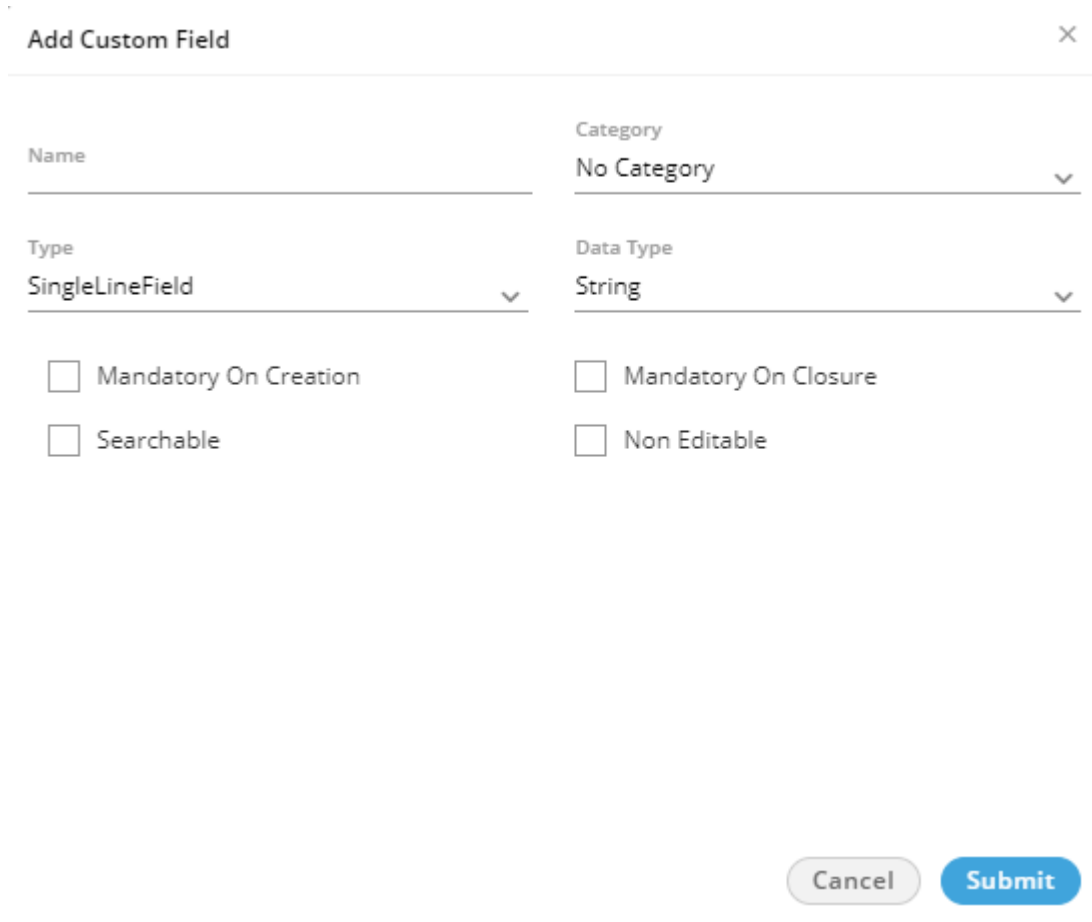
The deleted Category cannot be restored. The custom fields assigned to it will remain unassigned and you have to assign them to other category.

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

7.2.2.1.5 Create a Custom Field

Perform the following steps to create a custom field.

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



The screenshot shows a pop-up window titled "Add Custom Field" with a close button (X) in the top right corner. The form contains the following fields and options:

- Name:** A text input field.
- Category:** A drop-down menu currently showing "No Category".
- Type:** A drop-down menu currently showing "SingleLineField".
- Data Type:** A drop-down menu currently showing "String".
- Options:** Four checkboxes are arranged in two columns:
 - Mandatory On Creation
 - Mandatory On Closure
 - Searchable
 - Non Editable
- Buttons:** "Cancel" and "Submit" buttons are located at the bottom right.

Figure: Pop-up to create a Custom Field

2. Provide a name for the custom field.
3. Select a category using the "Category" drop-down menu.
4. In "Type" drop-down menu, select the type of custom field that you can to create.
 - A. **SingleLineField:** Select it to create a single line custom field. You can use this to take the input in a single text line.

Add Custom Field

Name
PIN Code

Category
NewCat1

Type
SingleLineField

Data Type
String

Mandatory On Creation

Mandatory On Closure

Searchable

Non Editable

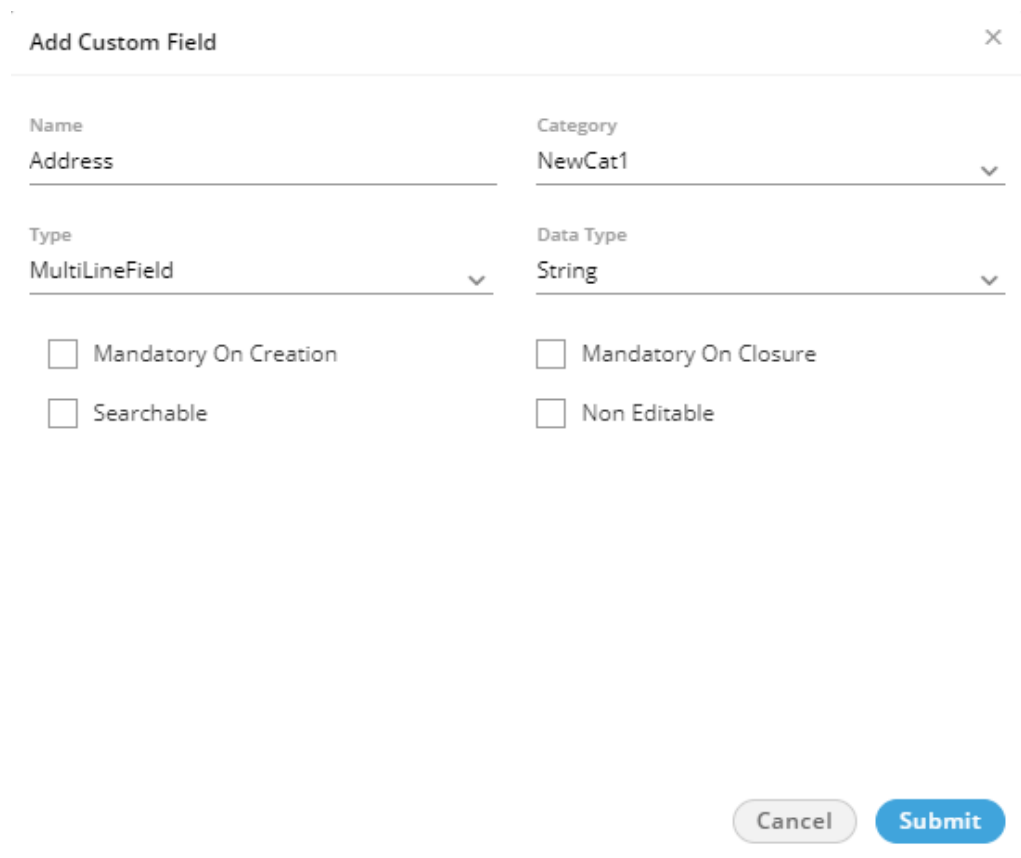
Cancel Submit

Figure: Single Line Text Field

Select any of the following data types for this field.

- String
- Integer
- Decimal

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



The screenshot shows a dialog box titled "Add Custom Field" with a close button (X) in the top right corner. The dialog is divided into two columns. The left column contains "Name" with the value "Address" and "Type" with the value "MultiLineField". The right column contains "Category" with the value "NewCat1" and "Data Type" with the value "String". Below these fields are four checkboxes: "Mandatory On Creation", "Mandatory On Closure", "Searchable", and "Non Editable". At the bottom right of the dialog are two buttons: "Cancel" and "Submit".

Figure: Multi Line Text Field

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

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

Add Custom Field [X]

Name: Areas of Interest

Category: NewCat1 [v]

Type: CheckBox [v]

Data Type: String [v]

Possible Values

Field Value	Field Value	Field Value
[]	Technology	News
[+]	[X]	[X]
Articles	Space Tech	Aeronautical
[X]	[X]	[X]

Mandatory On Creation Mandatory On Closure

Searchable Non Editable

[Cancel] [Submit]

Figure: Checkboxes as Custom Fields

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

- String
- Integer
- Decimal
- Boolean

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

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

Add Custom Field ✕

Name: Profession Category: NewCat1 ▼

Type: RadioButton ▼ Data Type: String ▼

Possible Values

Field Value	Field Value	Field Value
+	✕	✕
✕	✕	✕

Mandatory On Creation Mandatory On Closure
 Searchable Non Editable

Cancel
Submit

Figure: Checkboxes as Custom Fields

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

Select any of the following data types for this field.

- String
- Integer
- Decimal

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

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

Add Custom Field
✕

Name
Frequency of receiving Promotional Emails

Category
NewCat1 ▼

Type
SingleSelectionListBox ▼

Data Type
String ▼

Possible Values

Field Value	Field Value	Field Value
+	Daily	Weekly
✕	✕	✕
Field Value	Field Value	Field Value
Fortnightly	Monthly	With Every New Offer
✕	✕	✕

Mandatory On Creation

Searchable

Mandatory On Closure

Non Editable

Cancel
Submit

Figure: Single Selection List

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

Select any of the following data types for this field.

- String
- Integer
- Decimal

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

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

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

Add Custom Field
×

Name
Mode of Communication

Category
NewCat1

Type
MultiSelectionListBox

Data Type
String

Possible Values

Field Value	Field Value	Field Value
+	Email	Phone
×	×	×
Field Value	Field Value	Field Value
Chat	Twitter	Facebook
×	×	×

Mandatory On Creation

Searchable

Mandatory On Closure

Non Editable

Cancel
Submit

Figure: Multi-Selection List

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

Select any of the following data types for this field.

- String
- Integer
- Decimal

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

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

The screenshot shows a dialog box titled "Add Custom Field" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Name:** Location
- Category:** NewCat1 (with a dropdown arrow)
- Type:** DependentSingleSelectionListBox (with a dropdown arrow)
- Data Type:** String (with a dropdown arrow)

Below these fields is a section for "Level - 1" with a trash icon and an "Apply" button. Under "Level - 1", there is a "Label" field containing "Country" and a text input field containing "India, UK, USA, Canada".

At the bottom of the dialog, there are four checkboxes:

- Mandatory On Creation
- Mandatory On Closure
- Searchable
- Non Editable

At the bottom right, there are two buttons: "Cancel" and "Submit".

Figure: First Level of Dependent Single Selection List

Perform the following steps.

3.

A.

- I. In "Possible Values" section, provide a label for the first level of the list.
- II. Type the comma separated values in the text area.
[Scroll Bar Information](#): In case of multiple values, the scroll bar will be displayed in this text area.
- III. Now, you can click "Apply" to create the first level of the list.
- IV. To create the second level list, click "Add Level" just below the first level.
- V. A drop-down menu lists all values of the First Level List. You can select a First Level Value
- VI. Provide a label name and enter the multiple values in the comma separated format.
- VII. Click "Apply" to create a second level list.
- VIII. Select another value of First Level List in the drop-down menu, provide a label, and then enter comma-separated multiple values.
You can scroll down to enter the values for the next fields.
- IX. Click "Apply" to save the list.

The screenshot shows a dialog box titled "Add Custom Field" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Name:** Custom
- Category:** NewCategory (dropdown)
- Type:** DependentSingleSelectionListBox (dropdown)
- Data Type:** String (dropdown)

Below these fields, there are two levels of the list:

- Level - 1:** Has an "Apply" button. Below it is a "Label" field with the text "Extension" and a text area containing "Custom fields for Indian customers".
- Level - 2:** Has a trash icon and an "Apply" button. Below it is a "Label" field with the text "city" and a "Select Value" dropdown menu with "Custom fields for Indian customers" selected.

At the bottom right of the dialog, there are "Cancel" and "Submit" buttons.

Figure: Multiple Levels of Dependent Single Selection List

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

- X. You can create nested levels of Dependent Lists to meet your requirements.
- XI. Select "String" as the data type as it is the only one available data type.

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

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

The screenshot shows a dialog box titled "Add Custom Field" with a close button (X) in the top right corner. The dialog contains the following fields and options:

Name	Date of Birth	Category	NewCat1
Type	DateField	Data Type	DateTime

Below the fields are four checkboxes:

- Mandatory On Creation
- Mandatory On Closure
- Searchable
- Non Editable

At the bottom right of the dialog are two buttons: "Cancel" and "Submit".

Figure: Custom Date Field

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

- C. [Regex](#): The Regex custom field is used to store the custom unique identifier for the tickets. [Know more...](#)
4. Select any of the following options either to make the custom field mandatory either while creating the ticket or while closing it.

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

The screenshot shows the Ameyo interface for managing custom fields. On the left, a table lists custom fields with their names and categories. The 'Multi' field is selected. On the right, the configuration panel for the 'Multi' field is displayed, showing options for 'Mandatory On Creation', 'Mandatory On Closure', 'Searchable', and 'Non Editable'.

Custom Field Name	Category Name
<input checked="" type="checkbox"/> Multi	FAMA
<input type="checkbox"/> Single	No Category
<input type="checkbox"/> To Do	FAMA
<input type="checkbox"/> address	FAMA
<input type="checkbox"/> description	FAMA
<input type="checkbox"/> scheduled visit time	FAMA
<input type="checkbox"/> scheduled_visit_date	FAMA
<input type="checkbox"/> visit_time	FAMA

Configuration Panel for 'Multi' field:

- Name: Multi
- Category: FAMA
- Type: MultiLineField
- Data Type: String
- Mandatory On Creation
- Mandatory On Closure
- Searchable
- Non Editable

Figure: List of Custom Field

7.2.2.1.6 View and Modify Custom Field

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

1. Click the checkbox of a custom field to select it. Its details are displayed on the right side.
2. You can change the following values here.

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

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

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

7.2.2.1.7 Delete a Custom Field

The deleted custom field cannot be restored.

Perform the following steps to delete a custom field

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

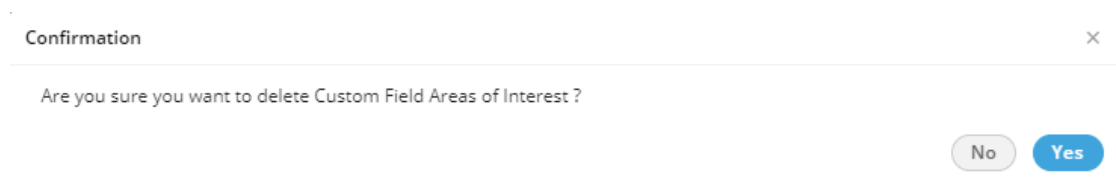


Figure: Deletion Confirmation Message

7.2.2.2 Regex Custom Fields in Process Settings

In Fusion, the customized fields in a ticket can be stored using the custom fields. This information can be used to refer to something or take action in another system through

HTTP Actions. However, the captured information should be valid to give a reference or take action.

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

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

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

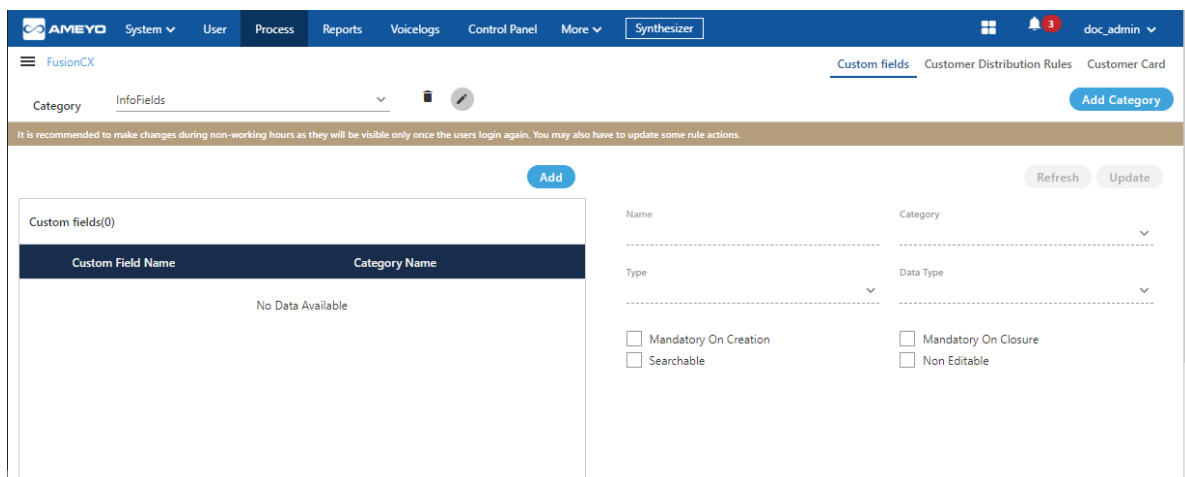


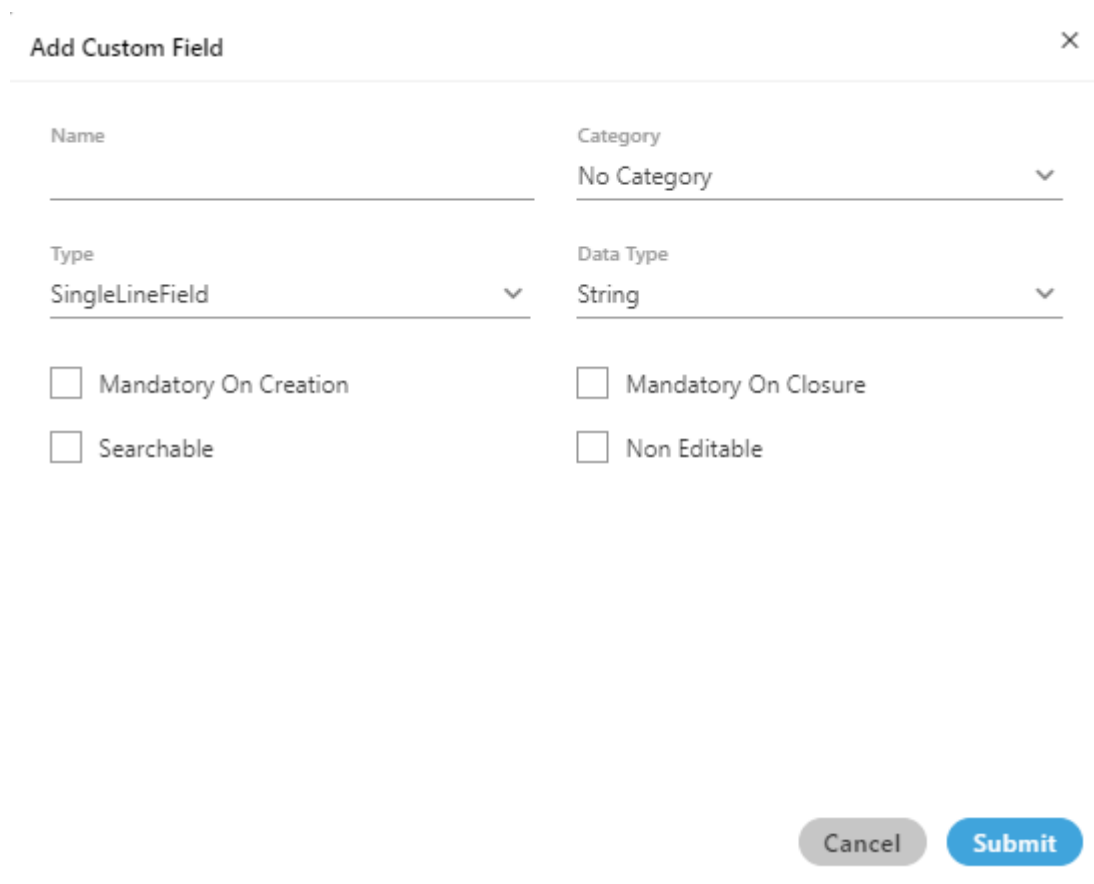
Figure: Custom Field Tab

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

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

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

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



The screenshot shows a modal window titled "Add Custom Field" with a close button (X) in the top right corner. The form contains the following fields and options:

- Name:** A text input field.
- Category:** A dropdown menu with "No Category" selected.
- Type:** A dropdown menu with "SingleLineField" selected.
- Data Type:** A dropdown menu with "String" selected.
- Options:** Four checkboxes are arranged in a 2x2 grid:
 - Mandatory On Creation
 - Mandatory On Closure
 - Searchable
 - Non Editable
- Buttons:** "Cancel" and "Submit" buttons are located at the bottom right of the modal.

Figure: New Custom Field

2. Provide a name for the new custom field.
3. Select the category of the Custom Field.
4. Click "Type" drop-down menu to select the custom field type.

The screenshot shows the 'Add Custom Field' dialog box. It has a title bar with a close button (X). The dialog is divided into several sections:

- Name:** UID
- Category:** InfoFields (dropdown arrow)
- Type:** SingleLineField (dropdown arrow)
- Data Type:** String (dropdown arrow)
- Options:**
 - Mandatory On Closure
 - Non Editable
- Buttons:** Cancel (grey), Submit (blue)

The 'Type' dropdown menu is open, showing the following options:


- RadioButton
- SingleSelectionListBox
- MultiSelectionListBox
- DependentSingleSelectionListBox
- DateField
- Regex (highlighted)

Figure: Types of Custom Field

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

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

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

- After entering the Regular Expression, the Ameyo User can provide a sample value in "Test a String" text field and click  icon to test whether the provided test value is valid or not.
 - Example 1:** The test value in the following case is valid as per the provided Regular Expression.

Add Custom Field
✕

Name
UID

Type
Regex ▼


Regular Expression *
[A-Z][A-Z][A-Z][1-9][1-9][1-9]

Mandatory On Creation

Searchable

Category
InfoFields ▼

Data Type
String ▼

Test a String
ABC123 

String match the regular expression.

Mandatory On Closure

Non Editable

Cancel
Submit

Figure: Successful Validation of the test value

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

Add Custom Field ✕

Name	Category
UID	InfoFields ▼
Type	Data Type
Regex ▼	String ▼
Regular Expression *	Test a String
[A-Z][A-Z][A-Z][1-9][1-9][1-9]	ABC1233 ▶
<input type="checkbox"/> Mandatory On Creation	<input type="checkbox"/> Mandatory On Closure
<input type="checkbox"/> Searchable	<input type="checkbox"/> Non Editable

Cancel Submit

Figure: Failed Validation of the test value

- **Example 3:** The test value in the following case is invalid as per the provided Regular Expression.

Add Custom Field ✕

Name UID	Category InfoFields ▼
Type Regex ▼	Data Type String ▼
Regular Expression * XYZid[1-9][1-9][1-9][1-9][1-9]	Test a String XYZid1234 ▶ String does not match the regular expression.
<input type="checkbox"/> Mandatory On Creation	<input type="checkbox"/> Mandatory On Closure
<input type="checkbox"/> Searchable	<input type="checkbox"/> Non Editable

Cancel Submit

Figure: Another failed validation of the test value

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

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

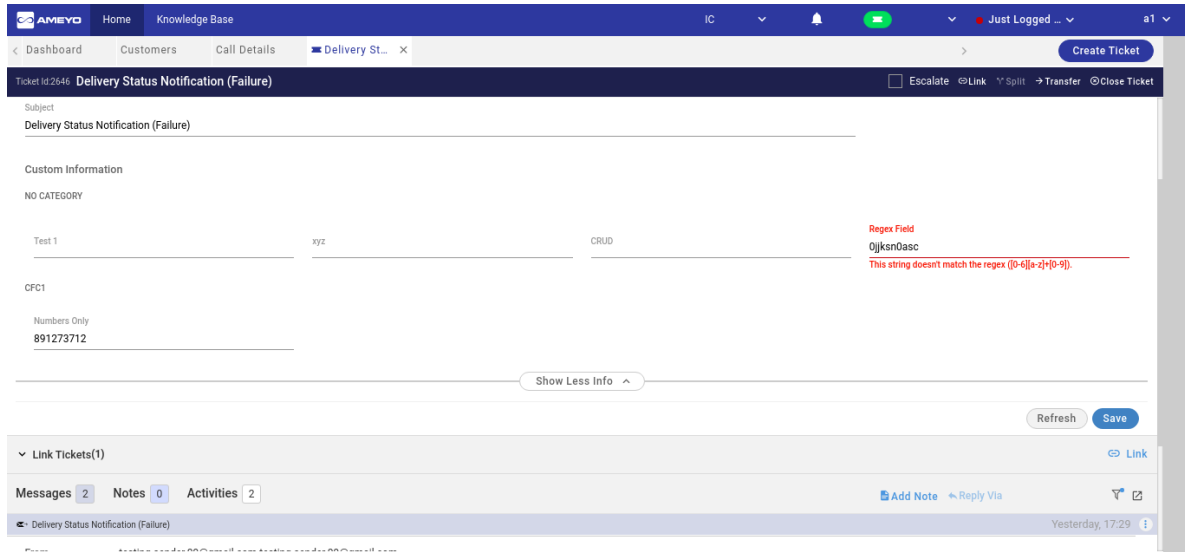


Figure: Inline Error Message for Regex Field on Agent Console

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

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

7.2.3 Customer Distribution Rules

The Voice-Admin can upload the customer data at process level.

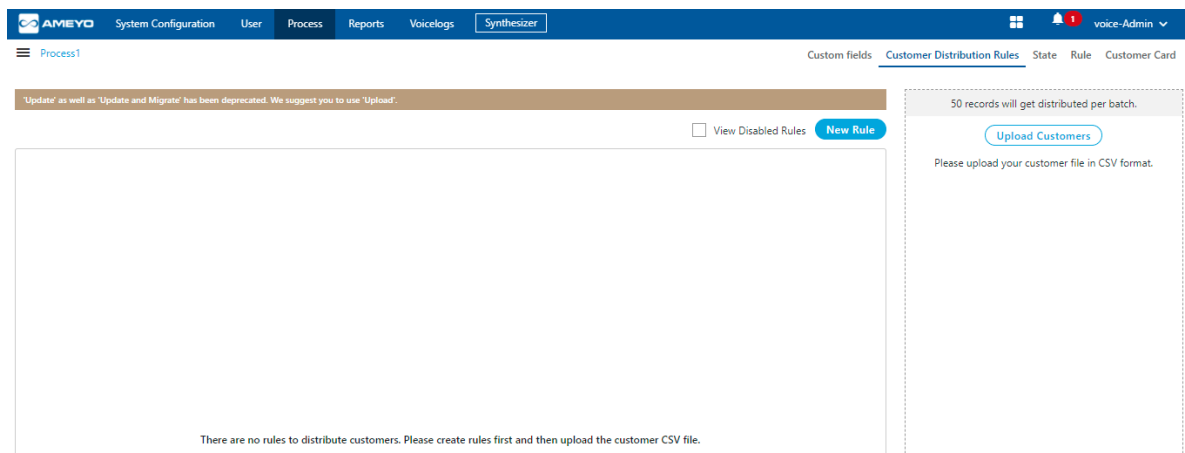


Figure: "Customer Distribution Rules" Tab in Process Settings

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

Step	Process Flow
Definition	Now, the Customer Data will now be uploaded and distributed at the process-level itself, instead of the system-level.
Ameyo Refresh Table and Customer Prospect Table	<p>Each Process will have its unique and separate Ameyo Refresh Table, which will be named "ameyo_refresh_table_<process_id>" (Here, process_id is the ID of the Process.)</p> <p>Also, each Process will have its unique and separate Customer Prospect table, which will name as "customer_prosect_<process_id>" (Here, process_id is the ID of the process).</p> <p>After upgrading the build to Ameyo 4.7, the Default Ameyo Refresh Table and the Default Customer Prospect Tables for every process will be created. If there are 5 processes, then 5 Ameyo Refresh Tables and 5 Customer Prospect Tables will be created as per the above mentioned naming conventions.</p>
Customer Data Upload	Customer Data sill will be captured from different sources such as Staging Database Architecture, API, files placed at FTP, or by uploading the data manually through CSV files. However, the backend configuration have to be done to instruct the Ameyo System that which data should be inserted in which "ameyo_refresh_table_<process_id>" table. Please refer to the following document to know more about the same.
Transferring Data from Ameyo Refresh Table to Customer Prospect Table	From "ameyo_refresh_table_<process_id>" table of a process, the data will be transferred to the Customer Prospect table, that is "customer_prospect_<process_id>", of that process.
Mapping the	The user still have to map the columns of "ameyo_refresh_table_<prospect>" table of a process with the columns of "customer_prospect_<process_id>" of the same process in the "csutomer_prospect_column_mapping" table. However, now the user have to specify the ID

Step	Process Flow
<p>Columns</p>	<p>the Data Table of that Process of which Ameyo Refresh Table and Customer Prospect Table have to be matched.</p> <p>Please refer to the following document to know more about the same.</p> <p>Document on Ameyo Preprocess</p> <p>https://sites.google.com/a/ameyo.com/engineering/Home/certificationknowledgebase/forward-feed-and-data-allocation-testing</p>
<p>Creating the Rules</p>	<p>"Customer Segregation" Rule tab from "System" → "System Configuration" → "Rule Engine" has been removed. A new tab "Customer Distribution Rules" has been added in "Process Settings".</p> <p>A new "Customer Distribution Rules" tab will be created for all existing and new processes in the Ameyo System.</p> <p>Now, the Voice-Admin have to create the customer distribution rules at the Process-level to use the data available in "customer_prospect_<process_id>" of a Process.</p>
<p>Applicability of the Rules on Customer Data</p>	<p>The created Rules will be applied in runtime, that is, as soon as the "customer_prospect_<process_id>" table has some Customer Data, the rules will be applied and moving the matched data from "customer_prospect_<process_id>" table to the Table Definition of that Process. After applying the rule, the data will be moved to the Data Table Definition of the process and will be deleted from "customer_prospect_<process_id>" table.</p>
<p>Action if no data is matched for the applied rules</p>	<p>If any Customer Data does not match any "Customer Distribution" Rule, then it will remain in the "customer_prospect_<process_id>" table and will not be used in any operation of the Ameyo System. The user can use the options on User Interface such as "Export" or "Export and Extract" to download the data from the Customer Prospect Table of a process. After downloading the data, the user can access it and analyze what new rules can be created in "Customer Distribution Rules" tab to use this data.</p>
<p>Summary</p>	<p>In nutshell, the customer data is now uploaded and managed at the Process level. Each process has its unique "ameyo_refresh_table_<process_id>" table and</p>

Step	Process Flow
	"customer_prospect_<process_id>" table. In addition to transferring the data to these tables from the linked sources, the user can also upload the data to these tables. The rules will also be created and applied at the Process-level. The user can also download the data from Customer Prospect table of any process.

The complete page is divided into two following sections.

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

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

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

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

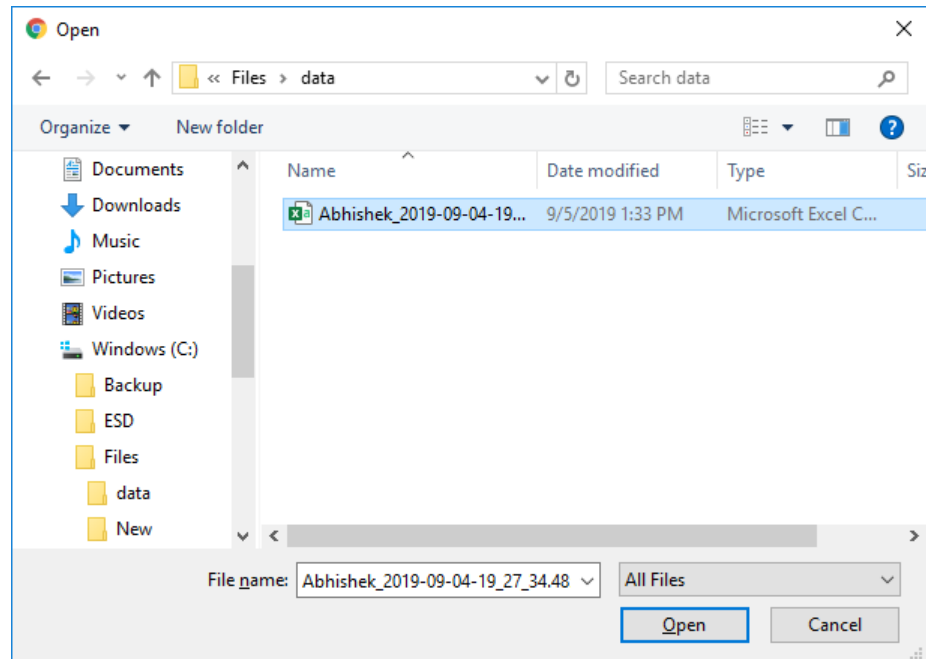


Figure: Open File dialog box

- B. Select the location where the CSV file is stored.
- C. Select the CSV file and click "Open". It opens the CSV file and displays the following pop-up.

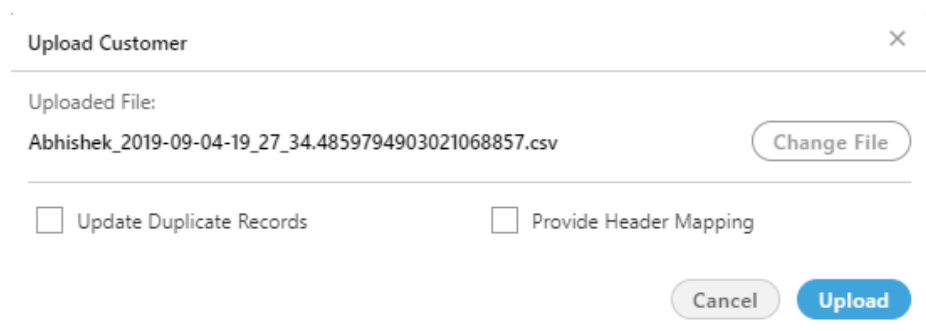


Figure: Pop-up to upload the CSV file

- D. Here, you can select the following options.
 - Update Duplicate Records: By default, the Ameyo System will not upload those records of Customer Data which are already uploaded in the Ameyo System. You can check this option to

update the already existing Customer Record with the latest data being uploaded.

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

twitter	timezone	facebook	phone2	name	phone3	phone4	phone
john	Asia/Kolkata	john@domain.com	123456789	John			

Now, the Voice-Admin is uploading the following data, in which the phone2 column contains the different value and phone3 contains the new value.

twitter	timezone	facebook	phone2	name	phone3	phone4	phone
john	Asia/Kolkata	john@domain.com	146797979	John	123479789		

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

twitter	timezone	facebook	phone2	name	phone3	phone4	phone
john	Asia/Kolkata	john@domain.com	146797979	John	123479789		

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

The screenshot shows a dialog box titled "Upload Customer" with a close button (X) in the top right corner. Below the title, it displays "Uploaded File: Abhishek_2019-09-04-19_27_34.4859794903021068857.csv" and a "Change File" button. Two checkboxes are checked: "Update Duplicate Records" and "Provide Header Mapping". Below these are two columns of dropdown menus for mapping CSV headers to table definition fields. The left column contains headers: "twitter", "facebook", "name", "phone4", "email", and "additional_column". The right column contains table definition fields: "timezone", "phone2", "phone3", "phone5", and "phone1". At the bottom right, there are "Cancel" and "Upload" buttons.

Figure: Map Headers of CSV with Table Definition Fields

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

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

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

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

2. **Create a new Rule:** It lets the Voice-Admin to create the new rules for the customer's data. Perform the following steps to create the new rule.

- 1.

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

The screenshot displays the 'Customer Distribution Rule' configuration page. It features a 'New Rule' section with a 'Rule Name*' text input and a 'Rule Description' text area. Below this is a 'Conditions' section with two radio button options: 'Any of the following' (selected) and 'All of the following'. A single condition is configured with 'phone2' as the condition, '<' as the operator, and an empty value field. An 'Add New Condition' button is located to the right of the condition field. The 'Actions' section at the bottom contains three dropdown menus: 'Type' (set to 'New'), 'Campaign' (set to 'Abhi_IN'), and 'Lead' (set to 'Abhi_lead'). The top navigation bar includes a user profile 'Abhishek' and several menu items: 'Chat Themes', 'Custom fields', 'Customer Distribution Rules' (active), 'State', 'Rule', and 'Customer Card'. 'Cancel' and 'Save' buttons are located in the top right corner.

Figure: Create the new Rule

- B. Provide the name of the rule in "Rule Name" column, through which you want to create the rule.
- C. Enter the description of the rule in "Rule Description" textbox.
- D. Click on the "Conditions" tab to provide the conditions. Select any of the following types of the condition from the drop-down list.
 - twitter
 - timezone
 - facebook
 - phone2
 - name

- phone3
- phone4
- phone5
- email
- phone1

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

- <
- =
- !=
- >

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

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

- E. After providing the condition, now provide the action which will perform when the condition satisfies.
- Select the type of the action from the drop-down list of "Types". The actions available to select are "New," "Update," and "Update and Migrate".
 - Select the campaign on which you want to upload the customer details, from the drop-down list of "Campaigns".
 - Select the lead on which you want to upload the data, from the "Lead" drop-down section.

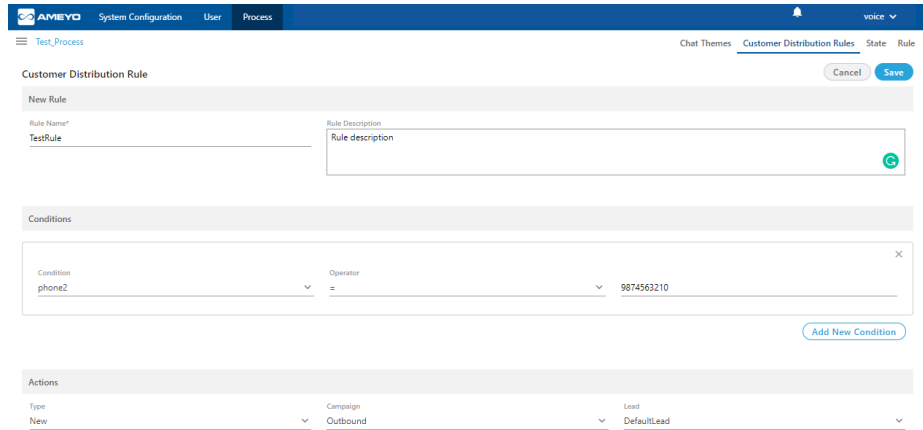



Figure: Sample Rule

- F. After providing all the information, click "Save" button to create a new rule. Clicking save button redirects you to the main page of the customer rule.
- 2. **Edit the Customer Distribution Rule:** The Voice-Admin can edit the created rule as well. Click  icon present in the actions column of the rule. The same page is opened as opened at the creation time of the rule.

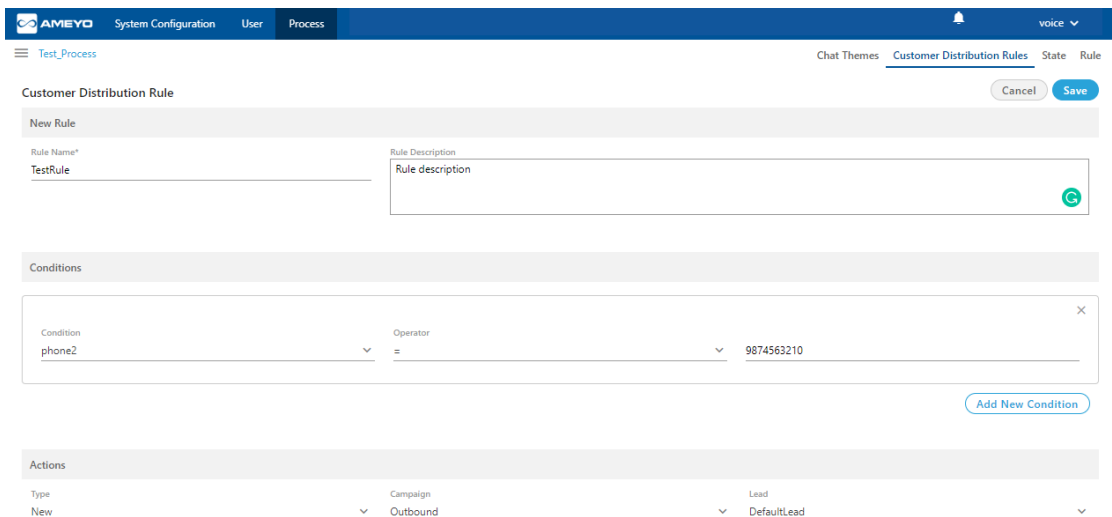



Figure: Edit the Rule

The Voice-Admin can change all the information of the rule.

Click "Save" button after editing the rule.

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

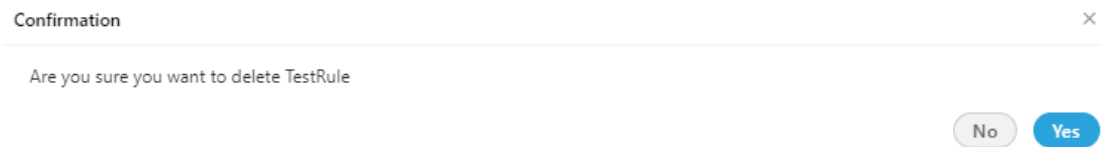




Figure: Delete the Rule

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

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

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

4. **Disable the Customer Distribution Rule:** The Voice-Admin can disable the enabled rule. Perform the following steps to disable the rule.
 4.
 - Select the rule, which you want to disable.
 - Toggle the  switch present in the status column of the rule to disable the rule.
5. **Enable the Customer Distribution Rule:** The Voice-Admin can enable the disabled rule. Perform the following steps to enable the rule.
 - Click "View Disabled Rules" checkbox to see the list of the disabled rules.
 - Select the rule, which you want to enable.
 - Toggle the  switch present in the status column of the rule to enable the rule.

7.2.4 State Tab in Process Settings (Licensable)

The two tabs - States and Rules - in Process Settings are actually to integrate PACE with the Ameyo System. PACE (ProActive Connect Enhancer) is a customer provider. Both PACE and Ameyo's Predictive Dialer form the PACE Solution. This customer provider is responsible for maintaining the cache from where the dialer can pick customers and dial

PACE should be used only when customer behavior is known beforehand. By analyzing this behavior, some rules have to be created which PACE uses to increase the overall productivity.

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

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

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

7.2.4.2 Business Use Case 2 - Division as per Collection Process

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

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

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

7.2.5 States

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

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

- freshNumber
- catNumber
- ns

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

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

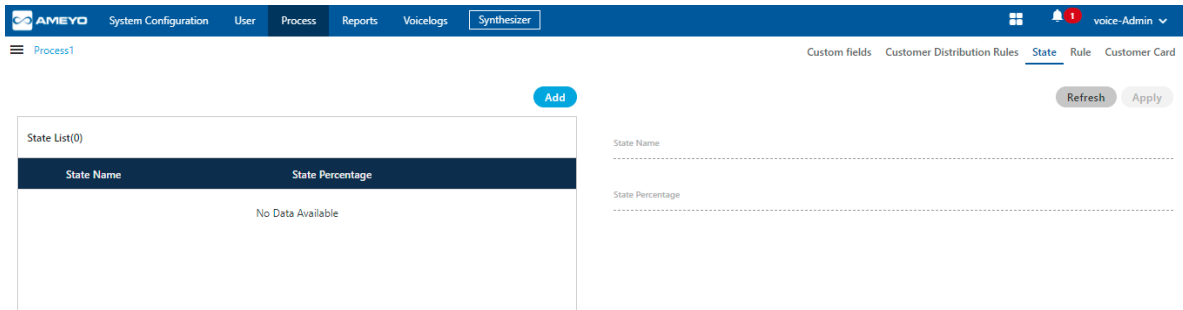
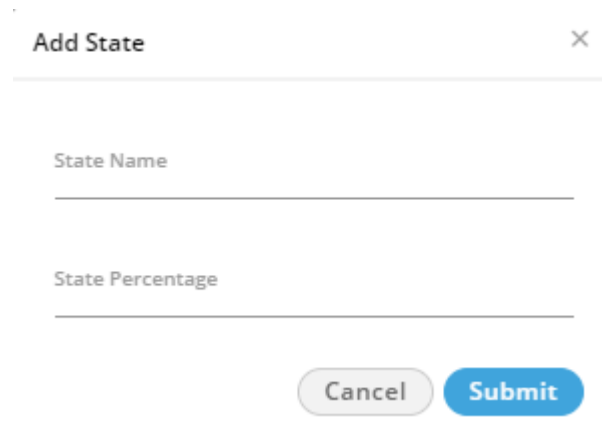


Figure: State Tab

7.2.5.1 Add a State

Perform the following steps to create a state.

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



The image shows a modal dialog box titled "Add State". It has a close button (X) in the top right corner. Below the title bar, there are two text input fields. The first is labeled "State Name" and the second is labeled "State Percentage". At the bottom of the dialog, there are two buttons: "Cancel" and "Submit".

Figure: Add a State

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

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

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

7.2.5.2 Default States

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

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

7.2.5.3 Modify a State

Perform the following steps to modify a state.

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

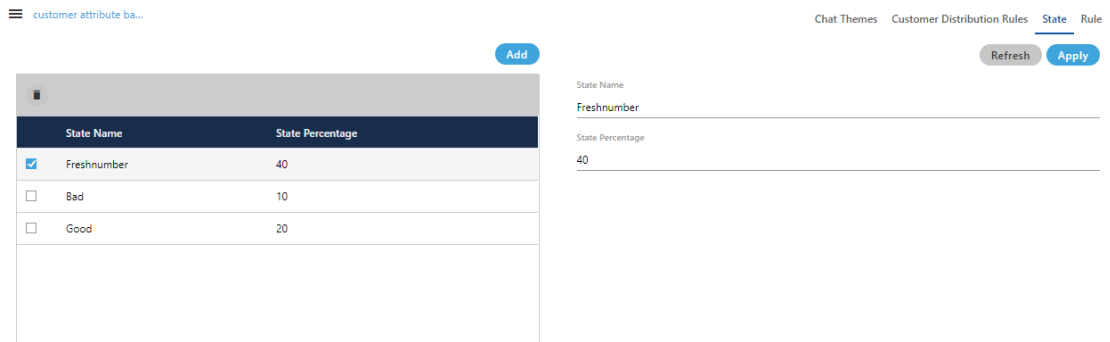


Figure: Details of a State

2. Here, you can change the following fields.

- A. State Name
- B. State Percentage

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

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

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

7.2.5.4 Delete a State

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

Perform the following steps to delete a state.

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

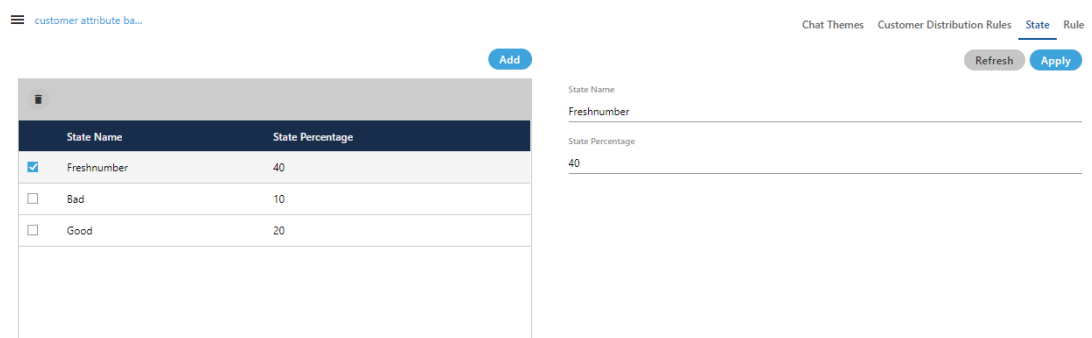



Figure: Details of a State

2. Click . It shows the following warning message.

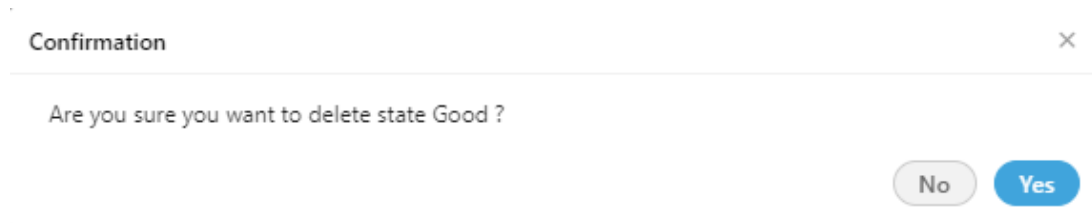


Figure: Warning before deleting a State

3. Click "Yes" to delete the state.

7.2.6 Rule Tab for PACE in System Settings (Licensable)

Rule Tab in System Settings allows the Voice-Admin to create the rule for the PACE.

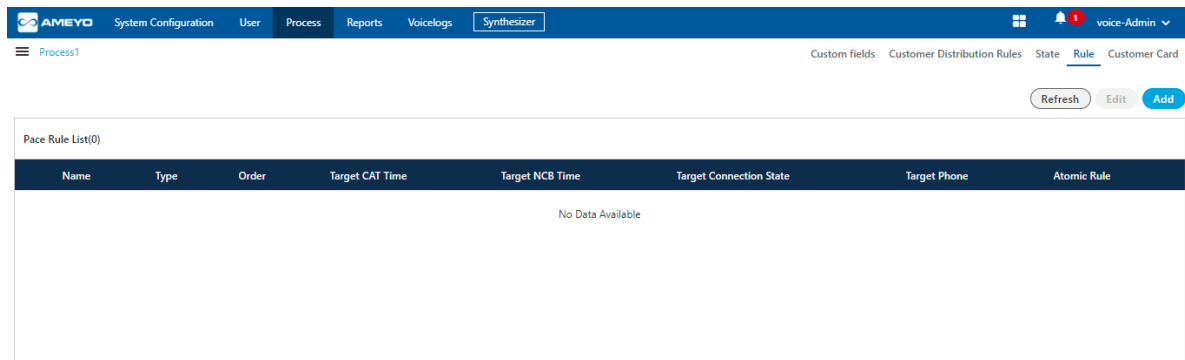


Figure: Rule Tab to Manage PACE

7.2.6.1 Add a PACE Rule

Perform the following steps to add a PACE Rule.

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

Figure: Pop-up to add a Rule

2. Provide a name for the rule.
3. Provide the order of execution in numbers.
4. [\(Optional\)CAT Time](#): Provide the target CAT (Call Around Time) in HH:MM:SS format. The call will be made to the customers only during this time.

Figure: Optional Date and Time Field

Suppose a case where three different PACE states such as "state1", "state2", and "state3" have been created. After calling, the customer (say C1) is moved to from "state1" to "state2". If the PACE rule is applied again on the same customer (C1), then the customer will move from "state2" to "state3". But, if the Voice-Admin wants to

change the state of the customer (C1) back to "state1" from "state2" or "state3", then the Voice-Admin has to create the rule and provide "0" (zero) values in both CAT and NCB fields. Instead of adding zero as value, these fields should remain blank to decrease the unnecessary manual inputs. To meet this requirement, the CAT and NCB fields in the PACE rules have made optional fields instead of being mandatory. (*) symbol with these fields have also been removed.

5. If you want to set the Time before which no call should be made to the customers, then enter this NCB (Not to Call Before) Time in HH:MM:SS format.
6. Except "freshNumber", "catNumber", and "ns", you can select a customized state upon which the rule will be applied.

The screenshot shows a form titled "Add Rule" with a close button (X) in the top right corner. The form contains the following fields:

- Rule Name:** AmeyoDemoRule
- Type:** Pace Rule Simple (dropdown menu)
- Order:** 20
- CAT Time:** 133 (Hour(s)), 20 (Minutes), 22 (Seconds)
- NCB Time:** 11 (Hour(s)), 00 (Minutes), 00 (Seconds)
- Target Connection State:** state1 (dropdown menu)
- Target Phone:** Good

At the bottom right of the form, there are two buttons: "Cancel" and "Next".

Figure: Sample Details

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

Add Rule Conditions ✕

LHS Operator
Campaign Id = RHS

Any of the following All of the following Add

LHS	Operator	RHS
No Data Available		

Cancel Back Next

Figure: Add Condition

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

9. In "LHS" drop-down menu, select any of the following values.

- System Disposition
- Disposition Code
- Disposition Class
- Last Status
- Last Disposition
- Last Dialed Time
- CAT Time
- NCB Time
- Connection State
- Campaign ID

10. Select any of the following operators.

- =
- <>
- <=
- >=

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

12. Click "Add" to add the rule.

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

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

Add Rule Conditions ✕


LHS Campaign Id Operator = RHS

Any of the following All of the following Add

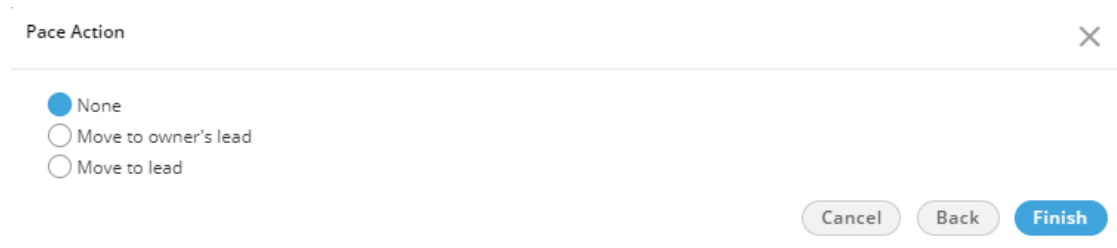
LHS	Operator	RHS	
System Disposition	=	FAILED	✕
Campaign Id	=	3	✕

Cancel Back Next

Figure: Add Conditions

You can click  icon to delete any rule.

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



Pace Action X

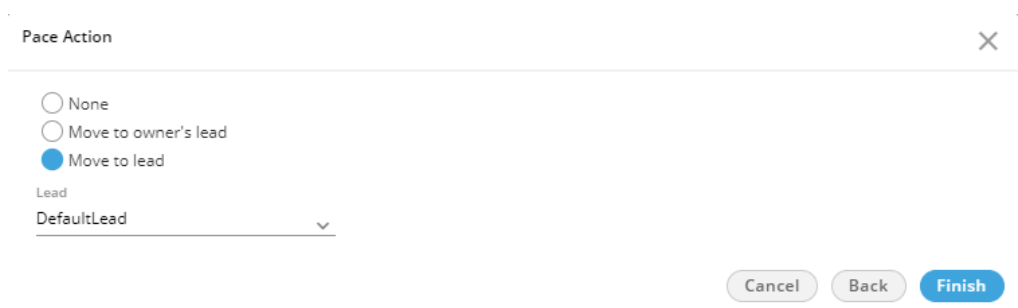
None
 Move to owner's lead
 Move to lead

Cancel Back Finish

Figure: Select an Action

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

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



Pace Action X

None
 Move to owner's lead
 Move to lead

Lead
DefaultLead v

Cancel Back Finish

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

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

Pace Rule List(1)							
Name	Type	Order	Target CAT Time	Target NCB Time	Target Connection State	Target Phone	Atomic Rule
<input type="checkbox"/> PaceRuleforGood	Pace Rule Simple	20	13:30:00	11:00:00	Good	9856320147	View

Figure: List of State Rules

7.2.6.2 Modify a PACE Rule

Perform the following steps to modify a PACE Rule.

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

Add Rule ✕

Rule Name
AmeyoDemoRule

Type
Pace Rule Simple

Order
20

CAT Time

133	20	22
Hour(s)	Minutes	Seconds

NCB Time

11	00	00
Hour(s)	Minutes	Seconds

Target Connection State
state1

Target Phone
Good

Cancel
Next

Figure: Modify PACE Rule

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

7.2.6.3 Delete a PACE Rule

Perform the following steps to delete a PACE Rule

1. Select the PACE Rule.

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

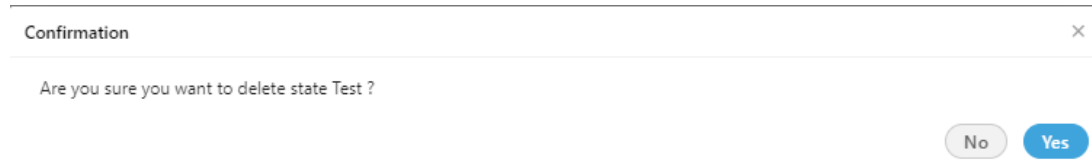


Figure:Delete PACE Rule

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

7.2.7 Customer Card Tab in Process Settings

"Customer Card" Tab in Process Settings allows the Voice-Admin to configure the layout of Customer Cards.

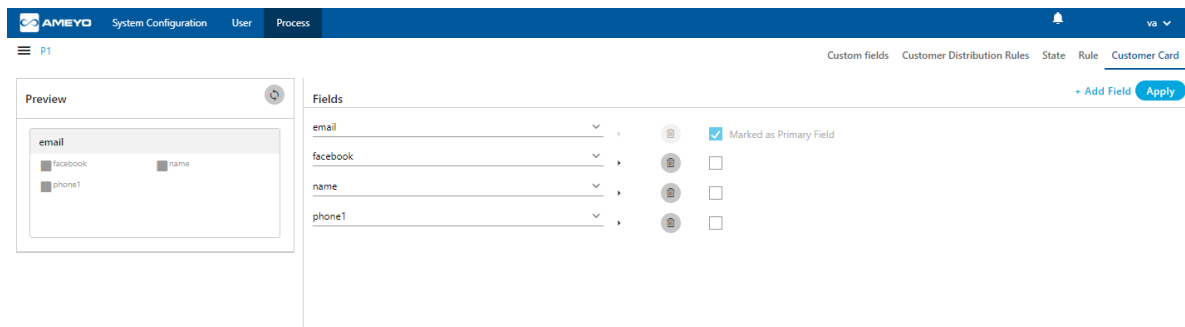


Figure: Customer Card Tab

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

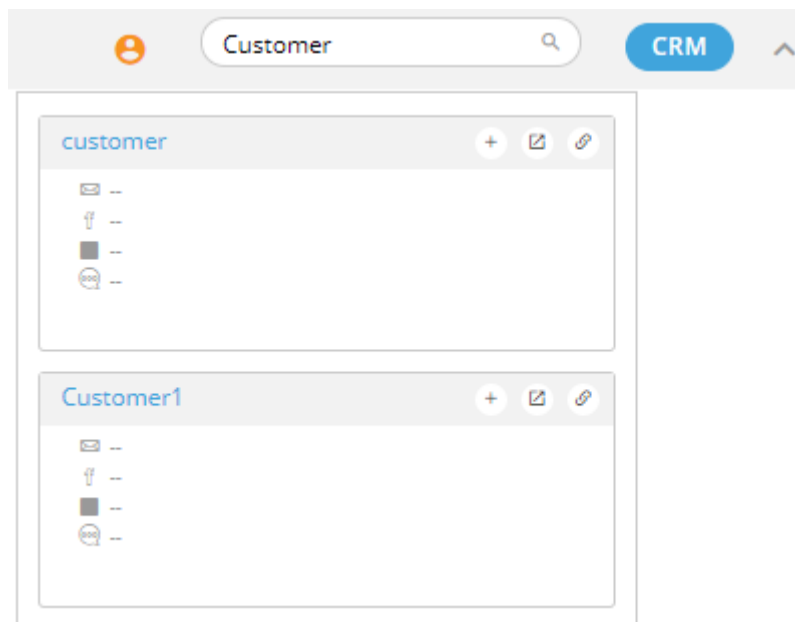


Figure: Displaying Customer Cards in Search

7.2.7.1 Default Fields

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

7.2.7.2 Default Values for Fields

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

- name
- email
- facebook
- phone1
- phone2
- phone3
- phone4

- phone5
- timezone
- twitter

Here, you can perform the following operations.

7.2.7.3 Add a Field

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

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

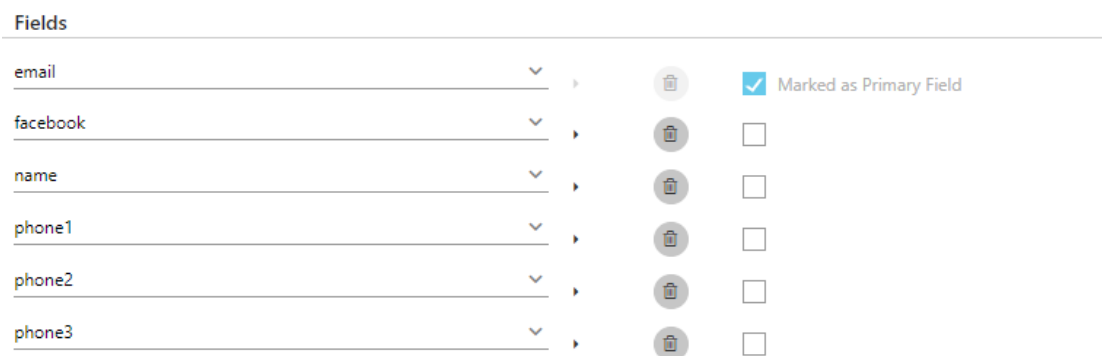


Figure: Add Customer Card

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

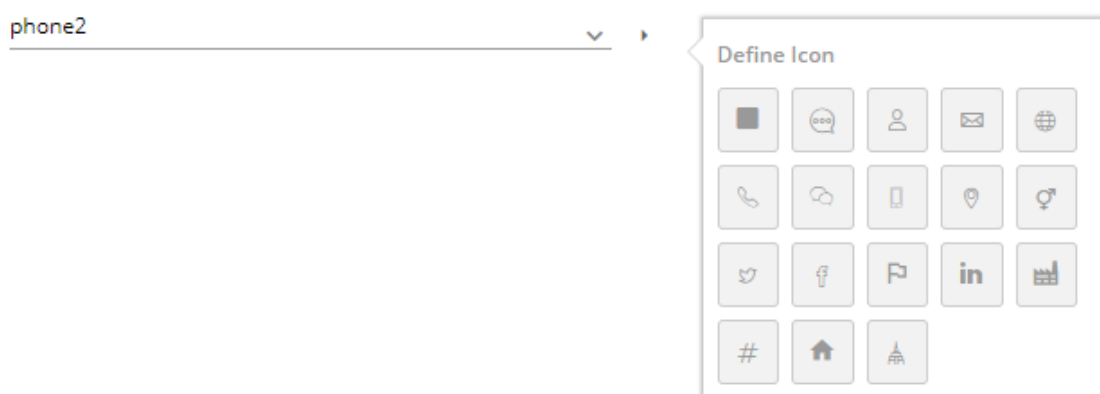


Figure: Select an icon

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

7.2.7.4 Make Primary Field


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

7.2.7.5 Edit a Field

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

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

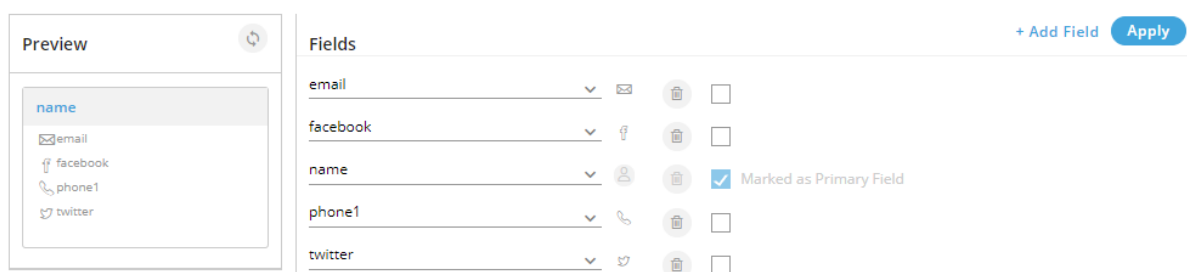
7.2.7.6 Delete a Field

Click  icon to delete any field.

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

7.2.7.7 Sample Customer Card

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

**Figure: Modified Customer Card**

8. Create a Campaign

Perform the following steps to create a new campaign.

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

Figure: Create New Campaign

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

3. Provide the input for the following fields.
 - A. **Process:** Select the process in which the campaign is to be created.
 - B. **Campaign Name:** Enter the campaign name.
 - C. **Campaign Type:** Voice-Admin can create any of the following types of campaigns.
 - I. Chat Campaign: This campaign includes chat-based interactions with the clients. The chat includes the following chat applications.
 - Ameyo Web Chat
 - External Chat Applications

- Twitter Direct Message
- Line Messenger
- Viber Messenger
- Facebook Messenger
- WhatsApp
- WhatsApp for Business

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

- II. Interaction Campaign: This campaign includes the interactions based on Email and chat applications included in the selected Chat Campaign.
- III. Interactive Voice Application: This campaign includes inbound voice communication. Here, the clients will call at your number and interacts with your users through an IVR or directly.
- IV. Outbound Voice Campaign: This campaign includes outbound communication. Here, your users call the clients.
- V. Voice Blast Campaign: This campaign provides you the facility to broadcast the prerecorded messages to the clients automatically.

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

4. **General Settings**: Now, the steps to configure the General Settings are different for each campaign type. These steps are mentioned hereinbelow.

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

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

`http://<Server_IP>:8786/<CRM_Name>/preview.php`

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

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

`http://<Server_IP>:8786/<CRM_Name>/customer.php`

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

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

`http://<Server_IP>:8786/<CRM_Name>/disposition.php`

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

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

Figure: Creating New Chat Campaign

- IV. ACW Connected(in sec): Provide the duration after which the idle chat session will be closed and disposed of.
- V. Disposition Plan: Select any of the following disposition plans.
- DefaultOVCDispositionPlan
 - DefaultIVADispositionPlan
 - DefaultVBCDispositionPlan

- DefaultCCDispositionPlan
 - DefaultIVRCDDispositionPlan
 - DefaultCSTACDispositionPlan
 - DefaultAOVCDDispositionPlan
- VI. Column Mapping: It shows the default and custom column mappings. You can select any one.
- VII. Peak Chat Count: Provide the maximum number of chat sessions that can be handled by an agent at a time even during the peak hours.
- VIII. Chat Logs Enabled: Check this box to enable the logging of chat logs. However, you can uncheck it to disable the chat logs.

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

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

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

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

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

```
http://<Server_IP>:8786/<CRM_Name>/customer.php
```

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

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

Figure: Creating New Interaction Campaign

- III. **Customer API URL:** If you want to use a third-party API within this campaign, provide the URL of the third-party API.
- IV. **Default BCC Address:** Provide the email address to which all emails be sent by default through BCC.
- C. **Interactive Voice Application:** Provide the following inputs to create an interactive voice application campaign.

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

`http://<Server_IP>:8786/<CRM_Name>/preview.php`

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

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

`http://<Server_IP>:8786/<CRM_Name>/customer.php`

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

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

`http://<Server_IP>:8786/<CRM_Name>/disposition.php`

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

Figure: Creating New Interactive Voice Application Campaign

- IV. Disposition Plan: Select any of the following disposition plans.
- DefaultOVCDispositionPlan
 - DefaultIVADispositionPlan
 - DefaultVB CDDispositionPlan
 - DefaultCCDDispositionPlan
 - DefaultIVRCDDispositionPlan
 - DefaultCSTACDDispositionPlan
 - DefaultAOVCDDispositionPlan
- V. Column Mapping: It shows the default and custom column mappings. You can select any one.
- VI. Peak Call Count: Provide the maximum number of chat sessions that can be handled by an agent at a time even during the peak hours.
- VII. No. of Last Calls: Provide the maximum number of last calls.
- VIII. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.

- IX. Time Zone Mapper Type: Select any of the following time zone mapper types, which allows you to map the time zones.
- **Lead Based Campaign Time Zone Mapper**: In this case, the time zone of the customer is specified from the time zone set in the lead settings.
 - **Default Campaign Time zone Mapper**: In this case, time zone is determined from customer data. We get the time zone info from the column specified against time zone column mapping in the campaign.
 - **Phone Pattern Based Campaign Time zone Mapper**: It is related to number management in Ameyo. With phone pattern based campaign time zone mapper, country code and area code can be mapped to a time zone and all numbers with that country code and area code will be dialed according to that time zone restriction/criteria.
 - **State Based Campaign Time zone Mapper**: It is related to number management in Ameyo. With state based campaign time zone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialed according to its time zone restriction/criteria.
- X. File Format: Select any of the following file formats in which the voice recordings will be saved.
- talaw
 - tulaw
 - tgsm
 - tg729
 - alaw
- XI. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.

- XII. Enable AMD: AMD stands for Answering Machine Detection. Check this box to enable the detection of answering machines when the auto-dialer makes the outbound calls automatically.
- XIII. SLA Threshold: Here, you can define the SLA Threshold, in which the incoming (inbound) calls should be answered in this campaign. The default value is 20 seconds, but it can be changed here.
- XIV. ACW Settings: Here, you can apply the ACW Timeout Settings. A textbox named "ACW Timeout (in sec)", which is a mandatory field while creating or modifying the campaign. The Administrator have to provide the value between 1 and 3600 seconds, which is the duration in which the call (after disconnection) should be disposed of or wrapped. Here, you can configure this option for both "Connected Calls" (calls which are connected with both customer and agent) and "Not Connected Calls" (calls which cannot be connected with either agent, or customer, or both). Perform the following steps here.

3.

A.

I.

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



The screenshot shows a configuration page titled "ACW Settings". It features a text input field for "ACW Timeout (in secs)*" with the value "30" entered. Below the input field is a horizontal line. At the bottom of the form, there is a checkbox labeled "Configure for connected and not connected calls", which is currently unchecked.

Figure: ACW Timeout

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

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

- II. **Voice Logs Settings:** Here, you can manage the settings related to the Voicelogs.
 - a. **Voice Logs Enabled:** Check this box to enable the logging of voice logs. However, you can uncheck it to disable the voice logs.
 - b. **Play Periodic Beep:** Check this box to play a beep periodically during the call to notify the caller that the call is being recorded. After checking it, you can specify the interval in seconds after which the beep will be played.
- III. **Auto Answer Enabled:** Check this box to enable the auto answer of the call for the campaign. This check box will be remained disabled, if the Auto-Answer setting is not enabled in the system settings.

- IV. **Inherit Settings from Parent:** Check this box to inherit the settings from the parent, that is, from the system settings. It means that, if the settings in the system is enabled to the auto-answer then, auto-answer setting will be same for the campaign. You can disable the auto-answer settings from here, as well.
- B. **Outbound Voice Campaign:** Provide the following inputs to create an outbound voice campaign.

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

```
http://<Server_IP>:8786/<CRM_Name>/preview.php
```

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

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

```
http://<Server_IP>:8786/<CRM_Name>/customer.php
```

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

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

```
http://<Server_IP>:8786/<CRM_Name>/disposition.php
```

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

Figure: Creating New Outbound Voice Campaign

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

3.

A.

I.

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

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

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

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

- V. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.
- VI. Time Zone Mapper Type: Select any of the following time zone mapper types, which allows you to map the time zones.
- **Lead Based Campaign Time Zone Mapper**: In this case, time zone of the customer is specified from the time zone set in the lead settings.
 - **Default Campaign Time zone Mapper**: In this case time zone is determined from customer data. We get the time zone info from the column specified against time zone column mapping in the campaign.
 - **Phone Pattern Based Campaign Time zone Mapper**: It is related to number management in Ameyo. With phone pattern based campaign time zone mapper, country code and area code can be mapped to a time zone and all numbers with that country code and area code will be dialed according to that time zone restriction/criteria.
 - **State Based Campaign Time zone Mapper**: It is related to number management in Ameyo. With state based campaign time zone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialed according to its time zone restriction/criteria.
- VII. File Format: Select any of the following file formats in which the voice recordings will be saved.
- talaw
 - tulaw
 - tgsm
 - tg729
 - alaw

- VIII. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.
- IX. Enable AMD: AMD stands for Answering Machine Detection. Check this box to enable the detection of answering machines when the auto-dialer makes the outbound calls automatically.
- X. ACW Settings: Here, you can apply the ACW Timeout Settings. A textbox named "ACW Timeout (in sec)", which is a mandatory field while creating or modifying the campaign. The Administrator have to provide the value between 1 and 3600 seconds, which is the duration in which the call (after disconnection) should be disposed of or wrapped. Here, you can configure this option for both "Connected Calls" (calls which are connected with both customer and agent) and "Not Connected Calls" (calls which cannot be connected with either agent, or customer, or both). Perform the following steps here.

3.

A.

I.

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



The screenshot shows a configuration page titled "ACW Settings". It features a text input field labeled "ACW Timeout (in secs)*" with the value "30" entered. Below the input field is a horizontal line. At the bottom of the form, there is a checkbox that is currently unchecked, followed by the text "Configure for connected and not connected calls".

Figure: ACW Timeout

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

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

- II. **Voice Logs Settings:** Here, you can manage the settings related to the Voicelogs.
 - a. **Voice Logs Enabled:** Check this box to enable the logging of voice logs. However, you can uncheck it to disable the voice logs.
 - b. **Play Periodic Beep:** Check this box to play a beep periodically during the call to notify the caller that the call is being recorded. After checking it, you can specify the interval in seconds after which the beep will be played.
- III. **Auto Answer Enabled:** Check this box to enable the auto answer of the call for the campaign. This check box will be remained disabled, if the Auto-Answer setting is not enabled in the system settings.

- IV. **Inherit Settings from Parent:** Check this box to inherit the settings from the parent, that is, from the system settings. It means that, if the settings in the system is enabled to the auto-answer then, auto-answer setting will be same for the campaign. You can disable the auto-answer settings from here, as well.
- B. **Parallel Predictive Voice Campaign:** Provide the following inputs to create a voice campaign that will be equipped with the features of Predictive Dialing Algorithm.

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

```
http://<Server_IP>:8786/<CRM_Name>/preview.php
```

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

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

```
http://<Server_IP>:8786/<CRM_Name>/customer.php
```

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

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

```
http://<Server_IP>:8786/<CRM_Name>/disposition.php
```

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

The screenshot shows the 'New Campaign' configuration page. The 'Campaign Type' is set to 'Parallel Predictive Voice Campaign' and the 'Campaign Name' is 'TestParallelPredictive'. The 'Campaign Description' is 'Testing Parallel Predictive Campaign'. The 'Settings' section includes:

- Disposition Plan: DefaultOVCDDispositionPlan
- Column Mapping: DefaultAdvancedOutboundColumnMapping
- Peak Call Count: 100
- No. of Last Calls: 10
- File Format: tg729
- Min. Callback Count: 100

Additional settings include 'Enable AMD' (unchecked), 'ACW Settings' (ACW Timeout: 30), 'Voice Logs Settings' (Voice Logs Enabled: checked), and 'Auto Answer' (Auto Answer Enabled: unchecked, Inherit Settings From Parent: checked). A 'FAQ' sidebar on the right contains questions about Peak Call Count, Max Callback Count, Dial on Timeout, Caller ID, and ACW Timeout.

Figure: Creating New Parallel Predictive Voice Campaign

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

3.

A.

I.

- DefaultOVCDDispositionPlan
- DefaultIVADDispositionPlan
- DefaultVBCDDispositionPlan
- DefaultCCDDispositionPlan
- DefaultIVRCDDispositionPlan
- DefaultCSTACDDispositionPlan
- DefaultAOVCDDispositionPlan

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

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

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

- V. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.
- VI. Time Zone Mapper Type: Select any of the following time zone mapper types, which allows you to map the time zones.
- **Lead Based Campaign Time Zone Mapper**: In this case, time zone of the customer is specified from the time zone set in the lead settings.
 - **Default Campaign Time zone Mapper**: In this case time zone is determined from customer data. We get the time zone info from the column specified against time zone column mapping in the campaign.
 - **Phone Pattern Based Campaign Time zone Mapper**: It is related to number management in Ameyo. With phone pattern based campaign time zone mapper, country code and area code can be mapped to a time zone and all numbers with that country code and area code will be dialed according to that time zone restriction/criteria.
 - **State Based Campaign Time zone Mapper**: It is related to number management in Ameyo. With state based campaign time zone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialed according to its time zone restriction/criteria.
- VII. File Format: Select any of the following file formats in which the voice recordings will be saved.
- talaw
 - tulaw
 - tgsn
 - tg729
 - alaw

- VIII. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.
- IX. Enable AMD: AMD stands for Answering Machine Detection. Check this box to enable the detection of answering machines when the auto-dialer makes the outbound calls automatically.
- X. ACW Settings: Here, you can apply the ACW Timeout Settings. A textbox named "ACW Timeout (in sec)", which is a mandatory field while creating or modifying the campaign. The Administrator have to provide the value between 1 and 3600 seconds, which is the duration in which the call (after disconnection) should be disposed of or wrapped. Here, you can configure this option for both "Connected Calls" (calls which are connected with both customer and agent) and "Not Connected Calls" (calls which cannot be connected with either agent, or customer, or both). Perform the following steps here.

3.

A.

I.

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



The screenshot shows a configuration window titled "ACW Settings". It contains a label "ACW Timeout (in secs)*" followed by a text input field containing the number "30". Below the input field is a horizontal line. At the bottom of the window is a checkbox that is currently unchecked, with the text "Configure for connected and not connected calls" next to it.

Figure: ACW Timeout

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

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

- II. **Voice Logs Settings:** Here, you can manage the settings related to the Voicelogs.
 - a. **Voice Logs Enabled:** Check this box to enable the logging of voice logs. However, you can uncheck it to disable the voice logs.
 - b. **Play Periodic Beep:** Check this box to play a beep periodically during the call to notify the caller that the call is being recorded. After checking it, you can specify the interval in seconds after which the beep will be played.
- B. **Voice Blast Campaign:** Provide the following inputs to create the campaign that broadcasts the pre-recorded voice messages automatically to the provided list of numbers.

- I. Column Mapping: It shows the default and custom column mappings. You can select any one.
- II. Peak Call Count: Provide the maximum number of chat sessions that can be handled by an agent at a time even during the peak hours.
- III. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.

Figure: Creating New Voice Blast Campaign

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

3.

A.

- I.
 - **Lead Based Campaign Time Zone Mapper**: In this case, time zone of the customer is specified from the time zone set in the lead settings.
 - **Default Campaign Time zone Mapper**: In this case time zone is determined from customer data. We get the time zone info from the column specified against time zone column mapping in the campaign.
 - **Phone Pattern Based Campaign Time zone Mapper**: It is related to number management in Ameyo. With phone pattern based campaign time zone mapper, country code and

area code can be mapped to a time zone and all numbers with that country code and area code will be dialed according to that time zone restriction/criteria.

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

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

- wav
- talaw
- tulaw
- tgsms
- tg729
- alaw

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

4.

- Supervisor
- Professional-Agent
- Executive
- Analyst
- Group Manager

- Only Supervisors can be added in Voice Blast Campaign.

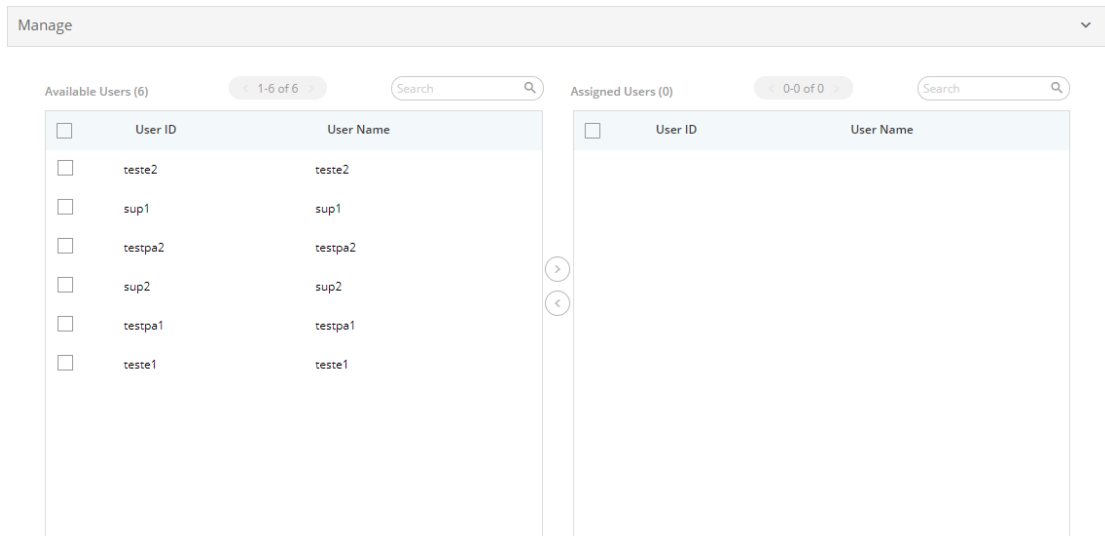



Figure: Section to assign users

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

4.
 - A. Select the users from the "Available Users" section. You can click the checkbox given on top to select all users. You can also search for the user names in the provided search box.
 - B. Click  icon to add the selected users.

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

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

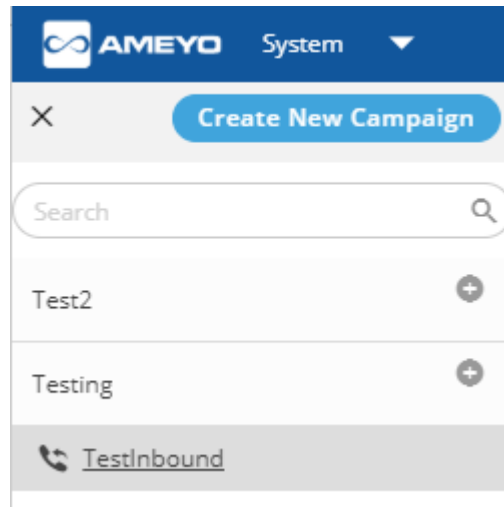


Figure: Created the Campaign

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

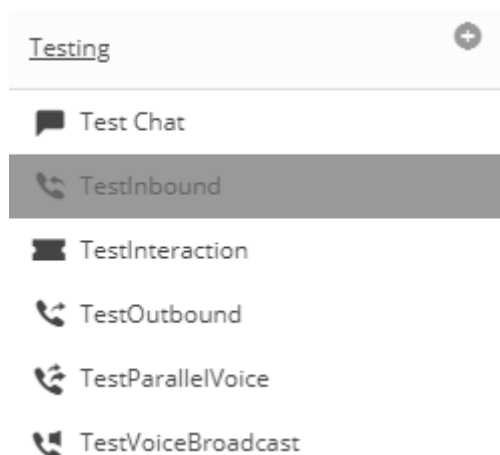


Figure: Created Multiple Campaigns

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

9. Changed System Configuration After Creating Campaign

9.1 Changed System Configuration After Creating Campaign

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

The screenshot displays the Ameyo System Configuration interface. The top navigation bar includes the Ameyo logo, 'System Configuration', 'User', and 'Process' tabs. The 'Process' tab is active, showing a sub-menu with options: Process, Settings, Blended Campaign, Call Routing, Dispositions, Skills, Exclusion, Voice Mail, Holiday/Office timings, and QA Parameters. An 'Add' button is visible above the Process List table. The table contains one entry with ID 1, Process Name 'NewProcess', and Process Type 'Default'. To the right, the configuration form includes fields for Process Name, Table Definition, CRM Properties URL, and checkboxes for 'Propagate Lead Removal' and 'Propagate Customer Removal'. A Description text area is also present. 'Refresh' and 'Apply' buttons are located at the top right of the configuration form.

ID	Process Name	Process Type
1	NewProcess	Default

Figure: New Tabs after creating the campaign

Click the links to know more about them.

- [Blended Campaign \(Licensed Feature\)](#)
- [Call Routing](#)
- [Dispositions](#)
- [Skills \(Licensed Feature\)](#)
- Exclusion
- [Voice Mail \(Licensed Feature\)](#)

- [Holiday/Office Timings \(Licensed Feature\)](#)

9.2 Blended Campaign (Licensed Feature)

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

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

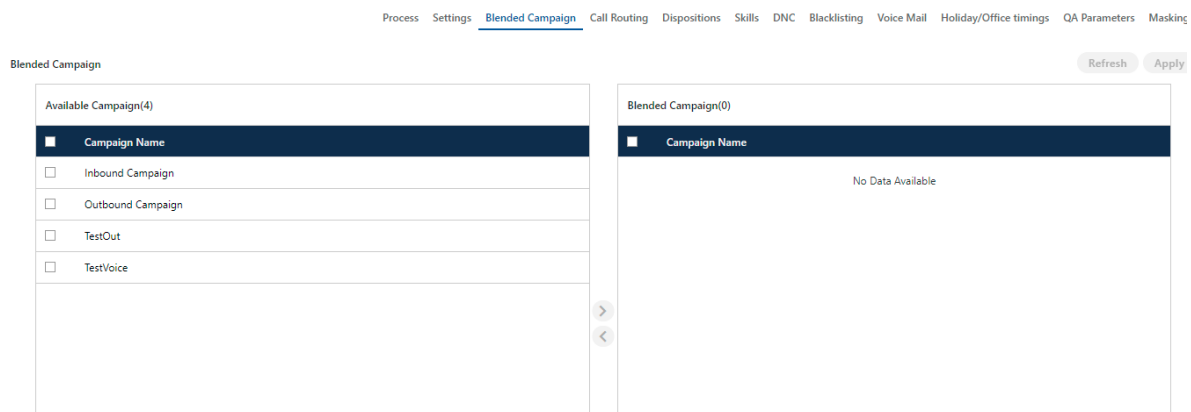



Figure: Blended Campaign

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

9.3 Call Routing Configuration

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

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

System Routing Up Down Refresh Apply

Policy Name	Policy Type	Assigned	Plans
<input checked="" type="checkbox"/> DefaultCallContextProfile	cc.call.context.based.profile	<input checked="" type="checkbox"/>	-
<input type="checkbox"/> DefaultSourcePhoneProfile	cc.source.contact.based.profile	<input checked="" type="checkbox"/>	-
<input type="checkbox"/> DefaultDestinationPhoneProfile	cc.destination.contact.based.profile	<input checked="" type="checkbox"/>	-

Figure: Routing Tab

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

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

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

9.3.1 Create Plan for a Policy

The Voice-Admin can define the routing plan for the policies. Perform the following steps.

1. Check the box to select a policy.
2. Click "-" under "Plans" header adjacent to a policy for creating a new plan.

The following pop-up is displayed on the screen.

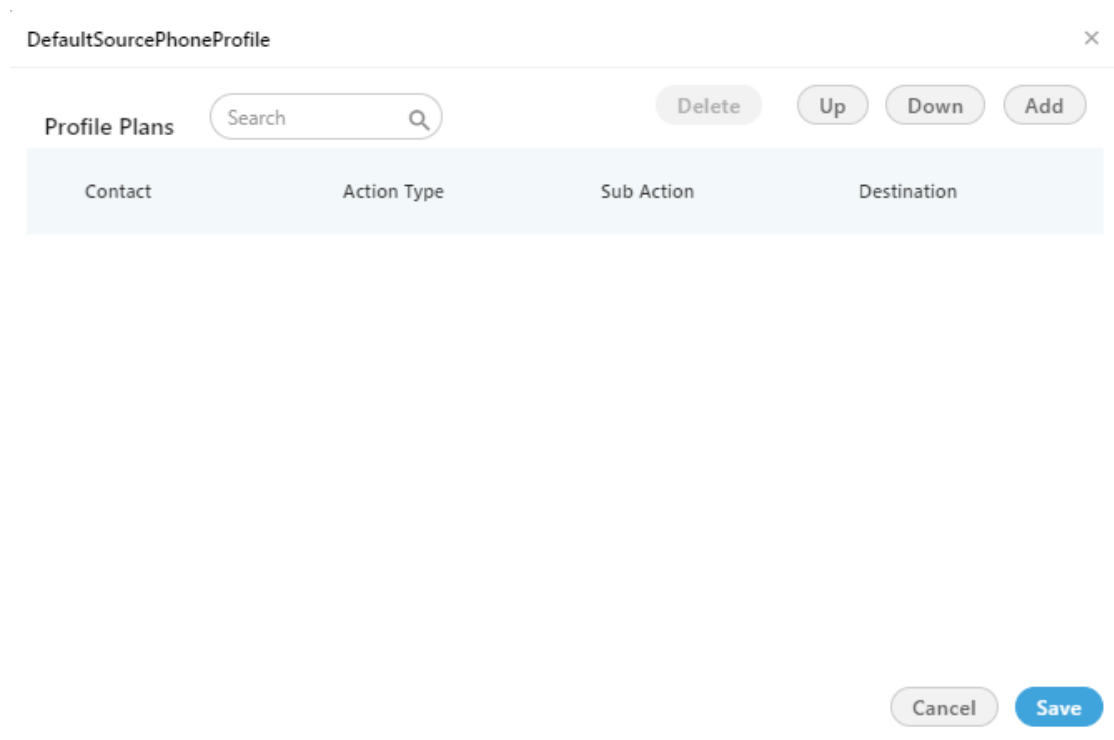


Figure: Blank Plan for DefaultSourcePhoneProfile

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

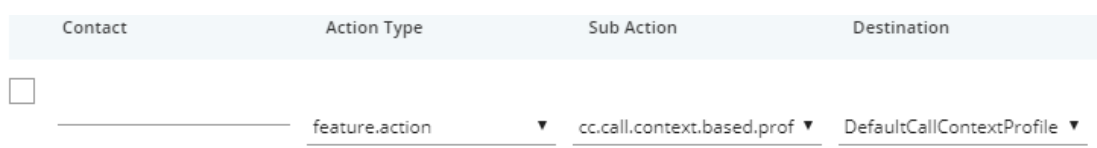


Figure: Blank Raw for DefaultSourcePhoneProfile and DefaultDestinationPhone Profile

Call Context	Action Type	Sub Action	Destination
<input type="checkbox"/>	cc_voicetest_DefaultVR ▼	feature.action ▼	default.acd.feature ▼

Figure: Blank Raw for CallContextProfile and DefaultDestinationPhone Profile

4. **Call Context:** This field comes for CallContextProfile Plan only. You have to select any of the following options.
- A. audiocodes
 - B. cc_voicetest_DefaultVR
 - C. softphone1
 - D. voip

OR

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

5. **ActionType:** It has two options.
- A. **Feature.action:** Select it to route the call to nodeflow. When selected, Sub-Action drop-down shows the following options.
 - I. default.acd.feature
 - II. did.based.phone.feature
 - III. manual.dial.feature

B. **Profile.action:** Select it to route the call to another profile plan.

When selected, Sub-Action drop-down shows the following options.

- I. cc.call.context.based.profile: Select it to transfer the call to the Call Context based Profiles. When selected, the available Call Context Profiles will be listed in the Destination drop-down menu.
- II. cc.destination.contact.based.profile: Select it to transfer the call to the Destination Contact based Profiles. When selected, the available Destination Contact Profiles will be listed in the Destination drop-down menu.
- III. cc.source.contact.based.profile: Select it to transfer the call to the Source Contact based Profiles. When selected, the available Source Contact Profiles will be listed in the Destination drop-down menu.

6. **Destination:** If "feature.action" is selected in Action Type, then you have to select the available destination numbers in this drop-down menu. If "profile.action" is selected, you can select the relevant profile policy such as "DefaultCallContextProfile" for "cc.call.context.based.profile" sub-action, "DefaultDestinationPhoneProfile" for "cc.destination.contact.based.profile", and "DefaultSourcePhoneProfile" for "cc.source.contact.based.profile".

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

DefaultSourcePhoneProfile

Profile Plans

Contact	Action Type	Sub Action	Destination
<input type="checkbox"/> 1800181120	profile.action	cc.call.context.based.prof	DefaultCallContextProfile
<input type="checkbox"/> 1800181119	profile.action	cc.destination.contact.ba:	DefaultDestinationPhone

Figure: Adding Plan for DefaultSourcePhoneProfile

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

You can add and modify the plan for all policies.

9.4 Dispositions

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

9.4.1 Disposition Class

This tab is used to define disposition codes and classes for the calls. Disposition class is a set or logical grouping of disposition codes. Disposition code is the reason of call disconnection which agent selects while disposing any call.

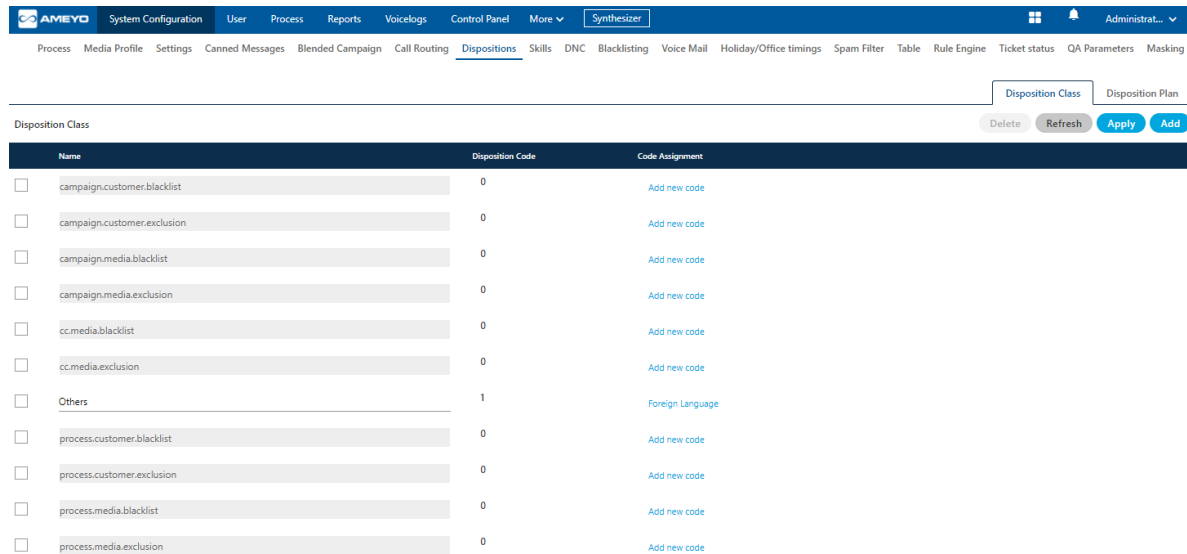


Figure: Disposition Class

Voice-Admin can perform the following steps here.

1. The Voice-Admin can add "Disposition Class" by clicking "Add" button. "User Defined" type will appear for the Voice-Admin created disposition classes.
2. The Voice-Admin can also add "Disposition Code" by clicking "Add New Code" option for a disposition class.

9.4.2 Disposition Plan

This tab is used to create disposition plan and assign the disposition codes in that plan. From here, Voice-Admin can select the disposition codes which needs to be assigned in created disposition plan.

Name	Enabled Code	Type	Code Assignment
<input type="checkbox"/> DefaultOVCDispositionPlan	20		user.forced.logged.off,user.transferred.toivr,Callback,user.transferred.to.c...
<input type="checkbox"/> DefaultIVADispositionPlan	20		user.forced.logged.off,user.transferred.toivr,Callback,user.transferred.to.c...
<input type="checkbox"/> DefaultVBCDispositionPlan	20		user.forced.logged.off,user.transferred.toivr,Callback,user.transferred.to.c...
<input type="checkbox"/> DefaultCCDispositionPlan	9		user.forced.logged.off,user.transferred.toivr,user.transferred.to.campaign...
<input type="checkbox"/> DefaultVRCDispositionPlan	20		user.forced.logged.off,user.transferred.toivr,Callback,user.transferred.to.c...
<input type="checkbox"/> DefaultSTACDispositionPlan	20		user.forced.logged.off,user.transferred.toivr,Callback,user.transferred.to.c...
<input type="checkbox"/> DefaultAOVCDispositionPlan	20		user.forced.logged.off,user.transferred.toivr,Callback,user.transferred.to.c...
<input type="checkbox"/> DefaultVCCDispositionPlan	8		user.forced.logged.off,user.transferred.toivr,user.transferred.to.campaign...

Figure: Disposition Plans

Perform the following steps.

1. To add a new Disposition Plan, click "Add" and provide a name in the text field and click "Add New Code" to add the code.

Name	Enabled Code	Type	Code Assignment
<input type="checkbox"/> DefaultAOVDPlan	-	User defined	Add new code

Figure: Adding New Disposition Plan

"User Defined" will be the type for custom disposition plans added by the Voice-Admin.

2. To change the code for an existing disposition plan, select it and click "Code Assignment option". It shows the following box for both adding and modifying the code assignments.

Plan : DefaultOVCDispositionPlan ✕

▼

schedule.callback

Callback

▼

Sale

Sale

▼

Others

Foreign Language

▼

telecom.issues

No Voice

Already hungup

Abrupt disconnection

Echo

Customer not able to hear

Customer volume too low

Agent volume too low

Voice breakage

Conference voice breakage

Conference disconnection

Conference DTMF

Figure: Add or Modify Code Assignments for any Disposition Plan

3. Select the checkboxes of different disposition codes which has to be assigned in that disposition plan. Uncheck those which you do not want to assign in the selected disposition plan.
4. Click "**Apply**" to save the changes. Rather, you can click the "**Refresh**" button to discard the changes.

9.4.3 Multi-Level Disposition

Ameyo offered the multi-level disposition selection for the user. Multi-Level means that the user can select the sub disposition directly. There is no need to select the main disposition from the disposition menu. Following are the two levels of the dispositions selection available in Ameyo.

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

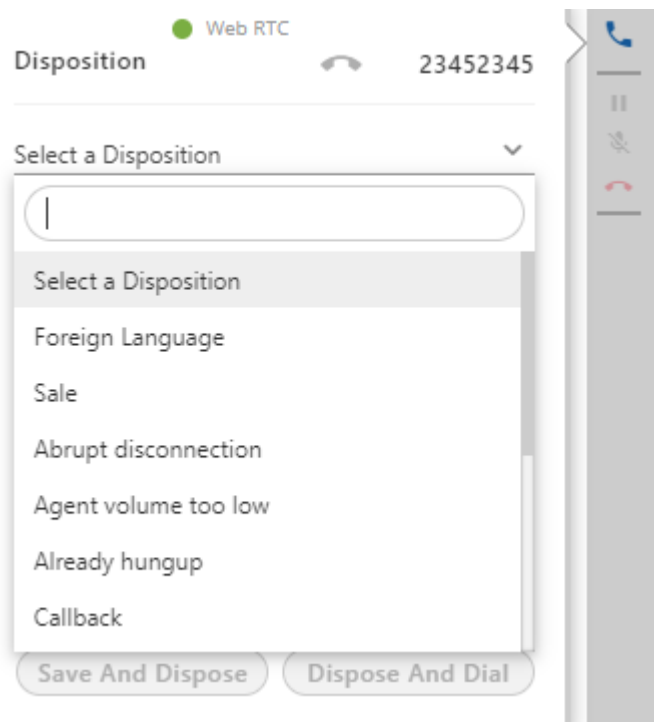


Figure: One Level Disposition

2. **Two Level Disposition:** It means that the user can select the disposition in a broad way, that is, the selection of the disposition is in the multi-hierarchic way. In this feature, all the nested dispositions come one after another. In this hierarchy, all the nested dispositions are visible under their main disposition code. The user can select the sub disposition according to the use.

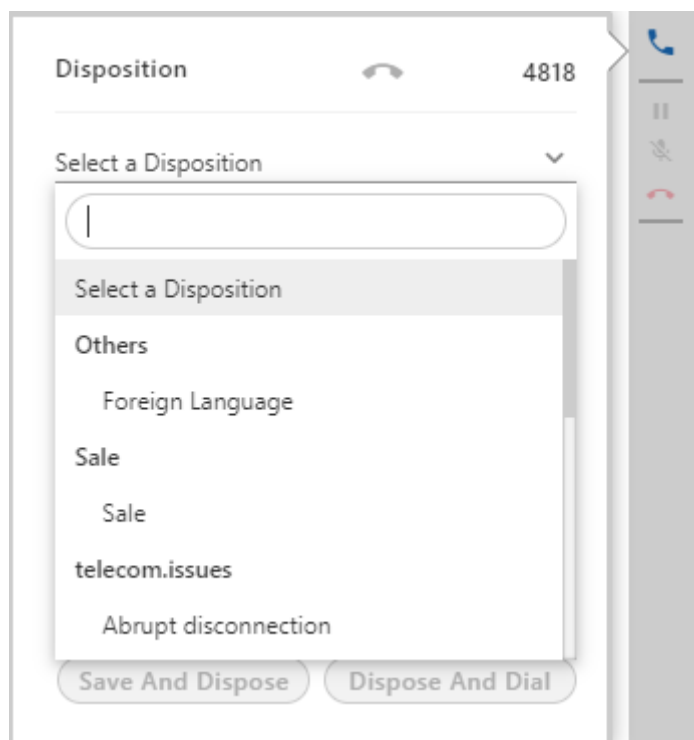


Figure: Two level Disposition Selection

9.4.3.1 Enable Two-level Disposition

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

1. Execute the following query to login to the database.

```
psql -U postgres ameyodb
```

2. Execute the following query to enable the two-level disposition.

```
INSERT INTO server_preference_store
(context_type,context_id,key,value) VALUES
('campaign','<campaign_id>','twoLevelDispositionEnabled','true
');
```

```
ameyodb=# INSERT INTO server_preference_store (context_type,context_id,key,value) VALUES ('campaign','5','twoLevelDispositionEnabled','true');
INSERT 0 1
ameyodb=#
```

Figure: Enable two-level disposition

- Execute the following query to exit from the database.

```
\q
```

For the definitions of Dispositions and the Call Types, click [here](#).

9.5 Skills Tab (Licensed Feature)

Skill-based routing (SBR) is a component of automatic call distributor (ACD) systems that filters and directs incoming inquiries to call center agents with the most applicable skill sets.

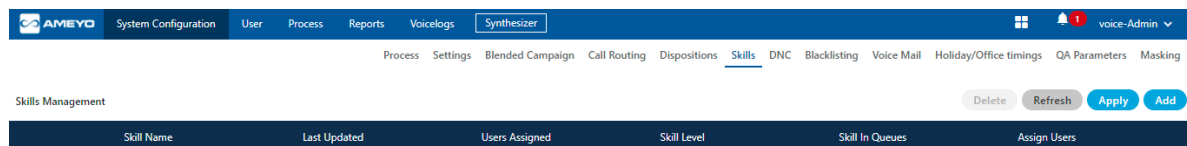


Figure: Skills Tab

By closely matching an incoming call to the call center agent best-prepared to address a particular issue, callers experience shorter wait times and faster resolution of their issues, reducing Average Handle Time. Because the agents are trained for more specific skill sets, less training is required.

Furthermore, most highly-skilled agents can be assigned to important clients, targeting resources where they will provide the most return for the call center. These factors significantly reduce abandon rates and increase agent utilization, productivity and overall call center efficiency.

As per different Queues/DIDs, different skills can be created.

9.5.1 Create a Skill

Voice-Admin may create new Skills by following below steps.

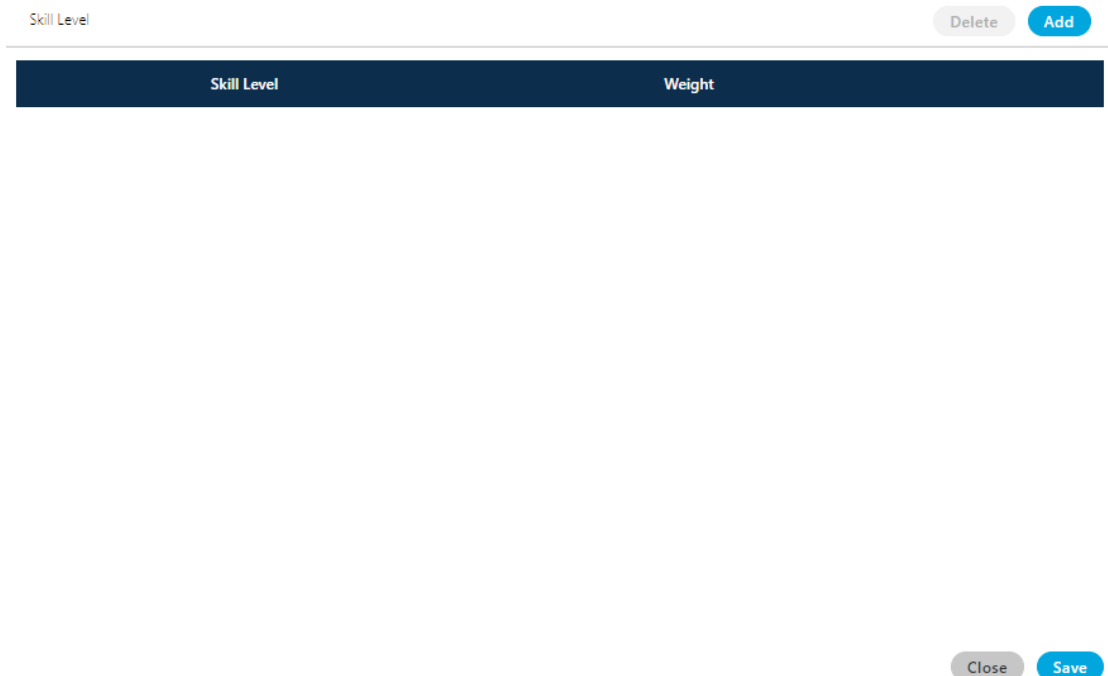
1. Click **"Add"** button. It shows a row in the blank area.



Skill Name	Last Updated	Users Assigned	Skill Level	Skill In Queues	Assign Users
<input type="text" value="New Skill Name"/>			<input type="button" value="Add Skill Level"/>		<input type="button" value="Manage Users"/>

Figure: Adding a New Skill

2. Enter Skill name and define skill levels by clicking **"Add Skill Level"**. It shows the following pop-up.



Skill Level	Weight
-------------	--------

Close Save

Figure: Row to Add a Skill Level

Here, click **"Add"** button to add a skill level. Enter the name of skill level and its weightage.

Skill Level Delete Add

	Skill Level	Weight
<input type="checkbox"/>	Beginner	1
<input type="checkbox"/>	Intermediate	4
<input type="checkbox"/>	Expert	8

Close Save

Figure: Adding Skill Levels

You can select a skill level name and click "Delete" it.

After adding the required skill levels, click "Save" to save them. Whereas you can click "Cancel" to discard the changes.

When you click "Save", it takes you back to the main that shows the list of added Skill Levels.

3. Assign the users in the respective skill by clicking "**Manage Users**" button.

Manage User ×

Available Users(2)		Assigned Users(2)		
User ID	User Name	User ID	User Name	Skill Level
<input type="checkbox"/>	analyst	<input type="checkbox"/>	a1	Good
<input type="checkbox"/>	Group	<input type="checkbox"/>	a2	Good

Close Save

Figure: Manage Users

Perform the following steps here.

- A. Select the user from **"Available"** section.
- B. Click on ">" symbol to assign the user. If Voice-Admin wants to unassign a user from the campaign, then simply select the user and click on "<" symbol to unassign that user.
Assigned users will be listed in **"Assigned"** section.
- C. To unassign users, select the users in "Assigned Users" section and click < icon.
- D. Click "Save" button to save the changes.

Skills Management Delete Refresh Apply Add

	Skill Name	Last Updated	Users Assigned	Skill Level	Skill In Queues	Assign Users
<input type="checkbox"/>	English	-	3	Intermediate, Beginner, ...	Inbound_Hindi	Manage Users
<input type="checkbox"/>	Hindi	-	2	Beginner, Advanced, Int...	Inbound_English	Manage Users
<input type="checkbox"/>	Marathi	-	1	Advanced, Expert, Begin...	Inbound_Marathi	Manage Users
<input type="checkbox"/>	Tamil	-	1	Beginner, Advanced, Int...	Inbound_Tamil	Manage Users

Figure: Added Skills

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

Assigned Queue X

Queue Name	Campaign
Inbound_Hindi	TestInbound

Close Save

Figure: List of Queues

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

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

9.5.2 Delete a Skill

The deleted skill cannot be retrieved. Also, the deleted skill will not be applied in the selected queue and campaign.

To delete a skill, select it and click "**Delete**" button. The warning message is displayed on the screen. Click "Yes" to delete the selected skill. Else, click "No" to not delete it.



Figure: Delete the Skill

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

9.6 DNC

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

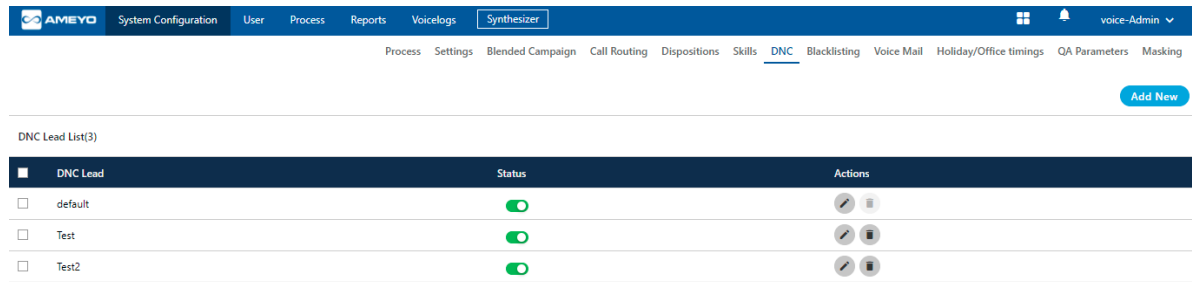


Figure: DNC Tab

9.6.1 Create DNC List

Voice-Admin can perform the following steps to create a DNC List.

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

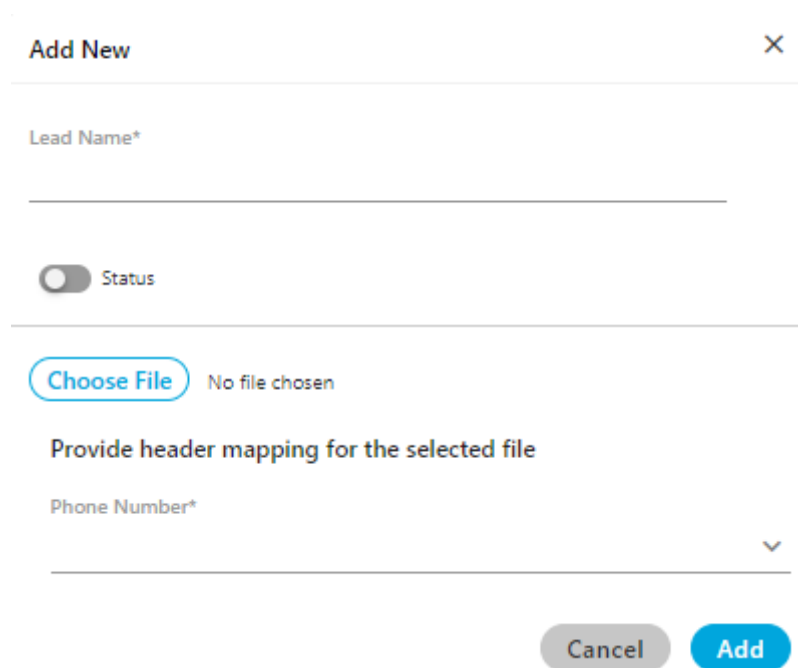
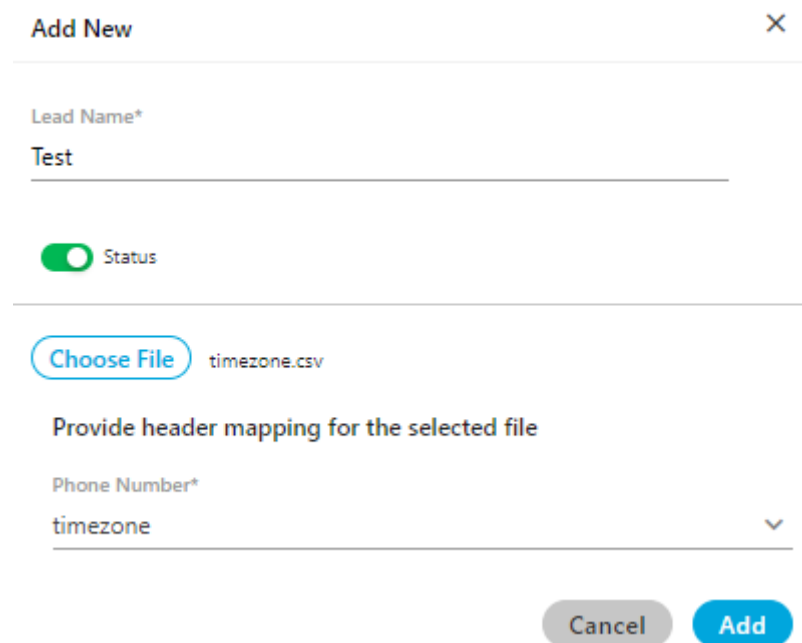


Figure: Add New DNC Lead

Here, you have to perform the following steps.

- A. In Lead Name column, enter the name of the lead.
- B. Toggle Status button to enable the new lead.
- C. Click "Choose File" to select the location and the CSV file. Click "Open" button to upload that file.
- D. In Header Mapping, voice-admin can map the file headers of lead with phone1, phone2, phone3, phone4, phone5, timezone, and name headers as per the created headers in the system.



Add New ×

Lead Name*
Test

Status

Choose File timezone.csv

Provide header mapping for the selected file

Phone Number*
timezone ▾

Cancel **Add**

Figure: Sample DNC Lead

- E. Click "ADD" to save the changes.
Rather, you can click "Cancel" to discard the changes.
2. After clicking "ADD", a result modal is shown that provides the overview of the uploaded contacts through the DNC lead.

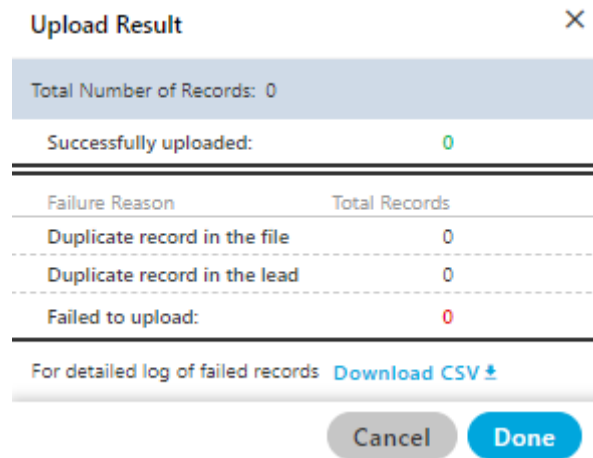



Figure: Upload Result Modal

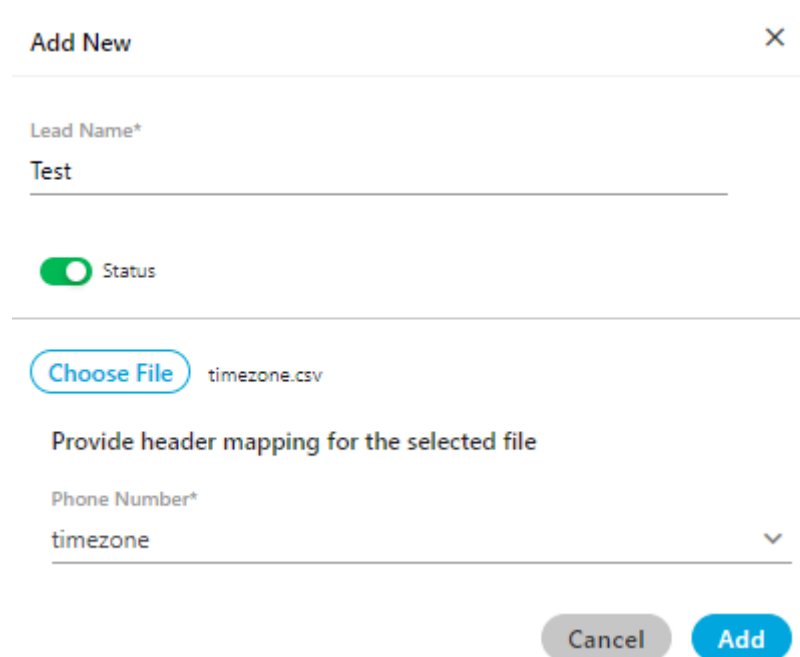
3. The voice-admin can click "Download CSV" option to download the CSV file of the contacts that have been failed while uploading.
4. The voice-admin can use the above steps to upload multiple DNC leads here.

DNC Lead List(3)		
DNC Lead	Status	Actions
<input type="checkbox"/> default	●	 
<input type="checkbox"/> Test	●	 
<input type="checkbox"/> Test2	●	 

Figure: Upload Result Modal

9.6.2 Edit a DNC Lead List

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



Add New ×

Lead Name*
Test

Status

Choose File timezone.csv

Provide header mapping for the selected file


Phone Number*
timezone

Cancel Add

Figure: Edit DNC Lead

9.6.3 Delete an DNC Lead List

The deleted DNC lead cannot be retrieved back.

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



Confirmation ×

Are you sure you want to delete ?

No Yes

Figure: Delete DNC Lead

9.7 Blacklisting

Sometimes, customers misuse or abuse the users of the organization. Some of the customers also call repeatedly to the users, which hampers the working of the users. In such cases, the voice-admin is able to blacklist the incoming calls of the customers. The contacts

that have been added to the blacklist lead are not able to call the contact center. The organization can decide how to handle such customers differently.

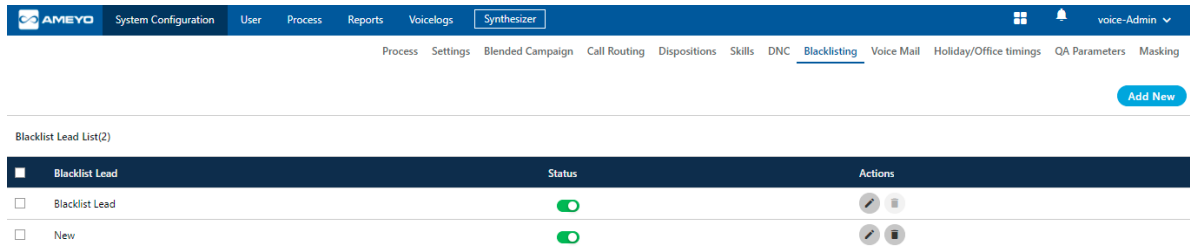


Figure: Blacklisting Tab

9.7.1 Add a new Blacklist Lead

Voice-admin can perform the following steps to add a new Blacklist lead.

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

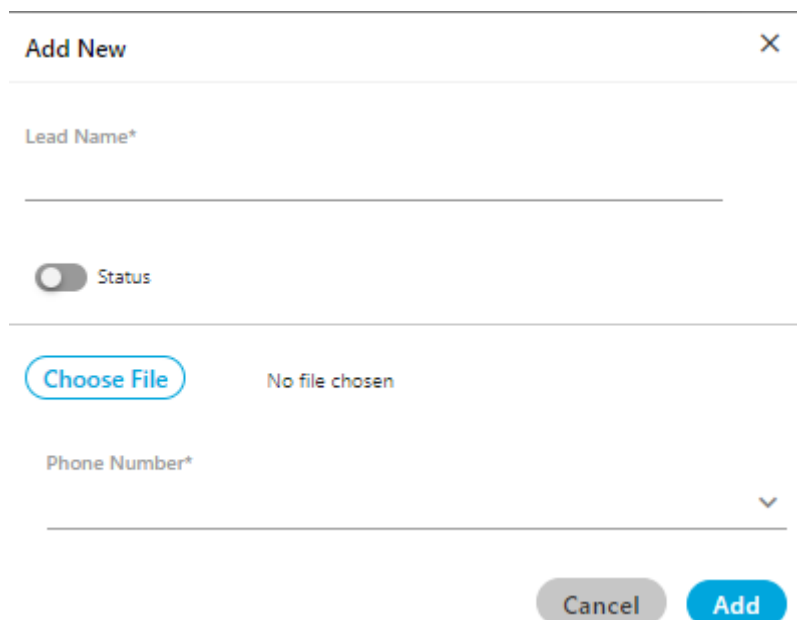
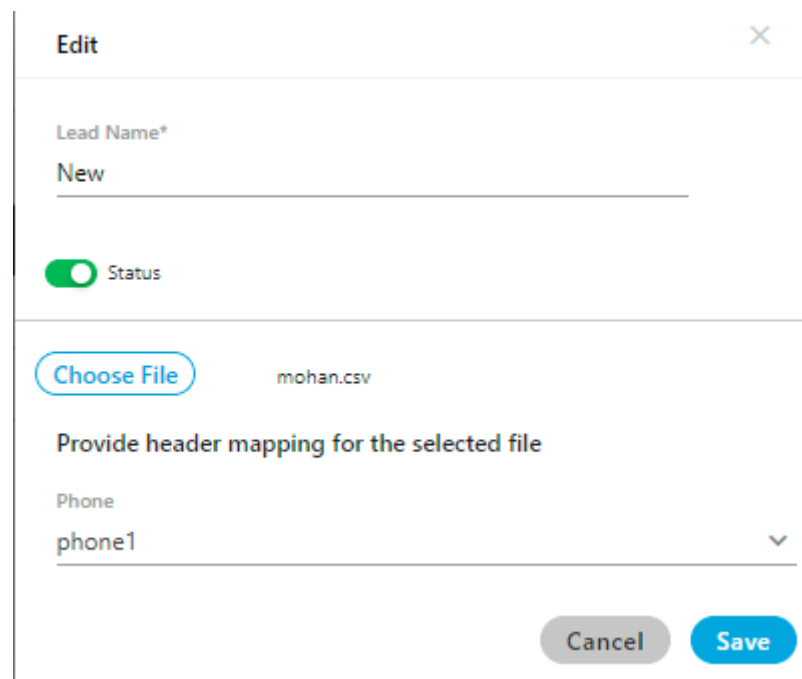


Figure: Add New Blacklist Lead

Here, you have to provide the following information.

- A. In Lead Name column, enter the name of the lead.
- B. Toggle Status button to enable or disable the new lead.
- C. Click "Choose File" to select the location and the CSV file. Click "Open" button to upload that file.
- D. In Header Mapping, the voice-admin can map the file headers of lead with phone, timezone, and name headers as per the created headers in the system.



The screenshot shows a modal window titled "Edit" with a close button (X) in the top right corner. The modal contains the following elements:

- A text input field labeled "Lead Name*" with the value "New".
- A toggle switch labeled "Status" which is currently turned on (green).
- A "Choose File" button and a file named "mohan.csv".
- A section titled "Provide header mapping for the selected file" containing a dropdown menu labeled "Phone" with the value "phone1" selected.
- At the bottom right, there are two buttons: "Cancel" and "Save".

Figure: Sample Blacklist Lead

- E. Click "ADD" to add a new lead.
Rather, you can click "Cancel" to discard the changes.
2. After clicking "ADD", a result modal is shown that provides the overview of the uploaded contacts through the Blacklist lead.

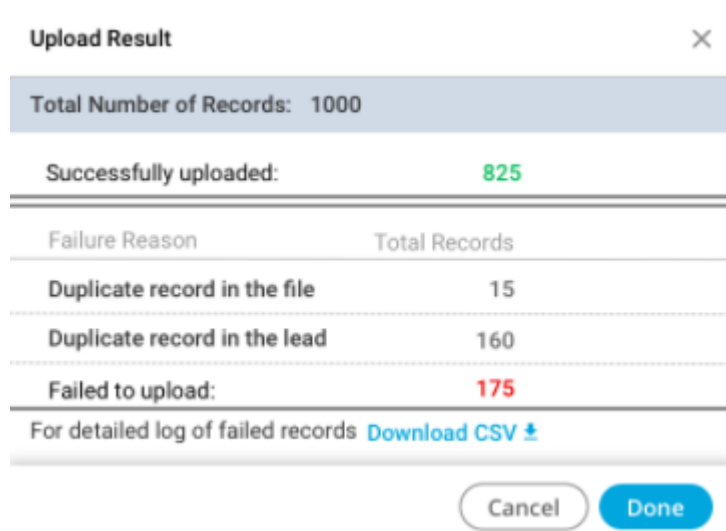


Figure: Upload Result Modal

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

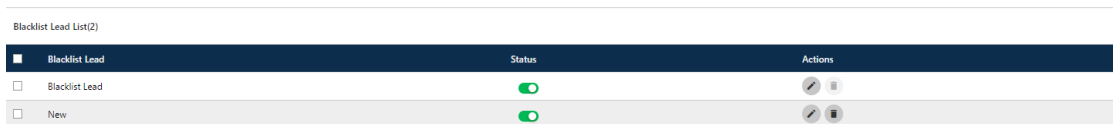
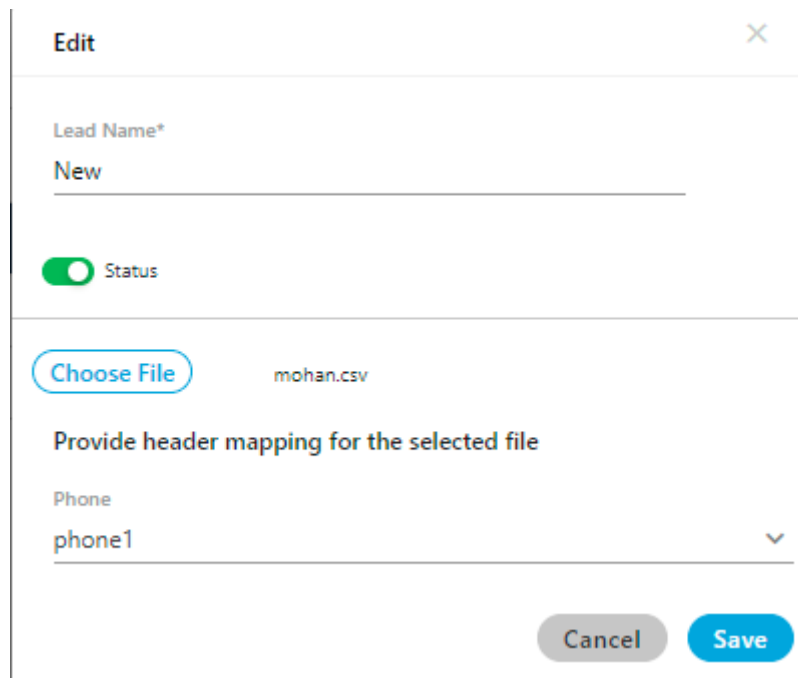


Figure: Upload Result Modal

9.7.2 Edit Blacklist Lead

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



Edit ×

Lead Name*
New

Status

Choose File mohan.csv

Provide header mapping for the selected file


Phone
phone1 ▼


Cancel Save

Figure: Edit Blacklist Lead

9.7.3 Delete an Blacklist Lead List

The deleted Blacklist lead cannot be retrieved back.

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



Confirmation ×

Are you sure you want to delete ?

No Yes

Figure: Delete Blacklist Lead

9.8 Voice Mail (Licensed Feature)

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

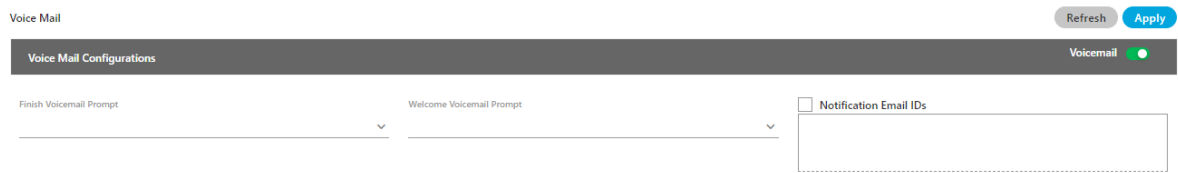


Figure: Voicemail

1. This feature is licensed. This tab will be only visible if voicemail license is procured at the center.
2. The Voice-Admin can enable Voicemail feature at system level if enabled by sliding the "**voicemail**" bar towards right. If this is not enabled, then voicemails will not be recorded.
3. To enable sending the voicemail's notifications, the Voice-Admin needs to check the "Notification Email IDs" checkbox.
 - A. **Notifications Email IDs:** Voice-Admin can enter the multiple email ids (gmail domain only) separated by a comma.
 - B. **Welcome Voicemail Prompt:** Select the welcome voicemail prompt from the drop down field.
 - C. **Finish Voicemail Prompt:** Select the finish voicemail prompt from the drop down field.
4. Click the "**Apply**" button to save the changes.

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

9.9 Holiday/Office Timings (Licensed Feature)

Holiday/Office Timings is a feature which defines the holiday and office hour timings. This feature is licensed. This tab will be only visible if holiday/ office timing license is procured at the center.

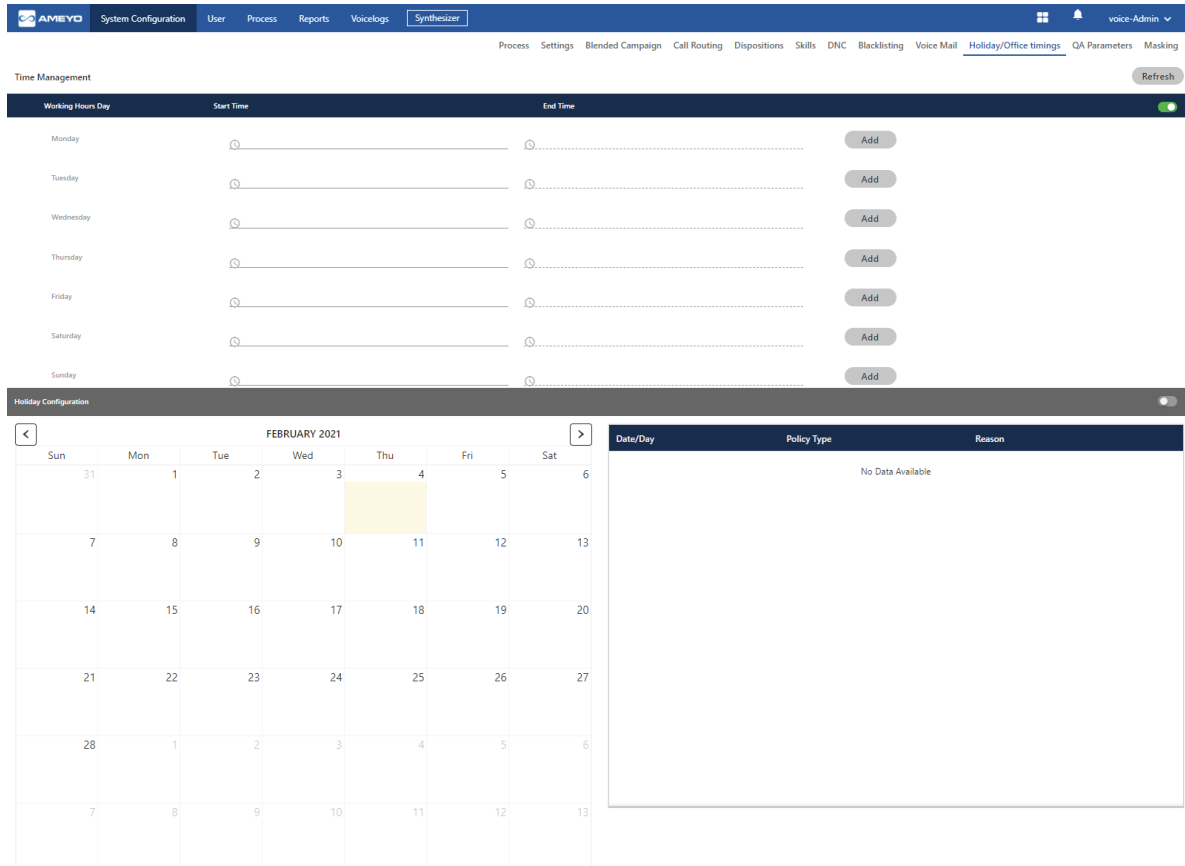


Figure: Holiday/Office Timings Tab

9.9.1 Working Hour Configuration

Perform the following step to configure the working hours.

1. The Voice-Admin can enable office hour at system level under Time Management by sliding the working hours bar towards right to enable working hours.

Working Hours Day	Start Time	End Time	
Monday	<input type="text"/>	<input type="text"/>	Add
Tuesday	<input type="text"/>	<input type="text"/>	Add
Wednesday	<input type="text"/>	<input type="text"/>	Add
Thursday	<input type="text"/>	<input type="text"/>	Add
Friday	<input type="text"/>	<input type="text"/>	Add
Saturday	<input type="text"/>	<input type="text"/>	Add
Sunday	<input type="text"/>	<input type="text"/>	Add

Figure: Define Working Hours

If this is not enabled, then office hour configuration will not be configured.

2. Click the time box under "Start Time" for any day to add the time when the working hours start. It shows a pop-up, in which you can select the hours, minutes, and seconds.

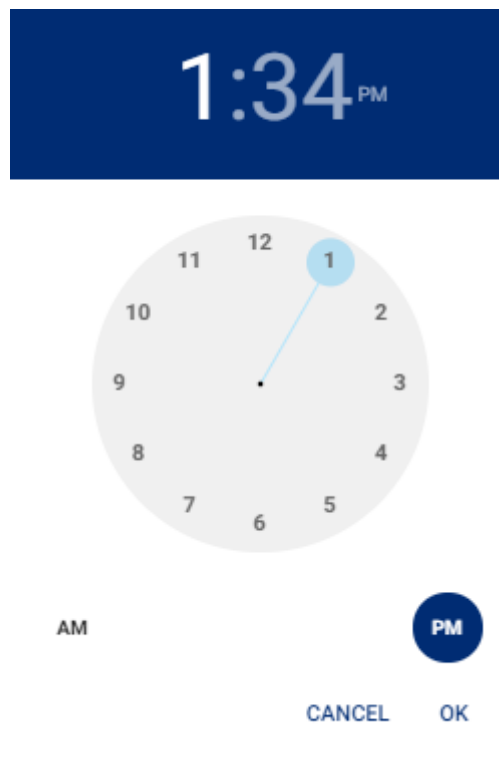


Figure: Select Time

3. You can click hour in header to use the clock to select the hour.

4. You can click minute in the header to use the clock to select the minutes.
5. You can click "PM" or "AM" in the header to change their values.
6. Once done, click "OK" to save the time. Similarly, you have to select "End Time".
7. Click "Add" to add the working duration for the particular day. Similarly, you can provide the working hours for all seven days as displayed in the following screenshot.

Working Hours Day	Start Time	End Time	
Monday	Time 08:00 AM	Time 10:00 PM	Add Delete
Tuesday	Time 08:00 AM	Time 10:00 PM	Add Delete
Wednesday	Time 08:00 AM	Time 10:00 PM	Add Delete
Thursday	Time 08:00 AM	Time 10:00 PM	Add Delete
Friday	Time 08:00 AM	Time 10:00 PM	Add Delete
Saturday	Time 08:00 AM	Time 10:00 AM	Add Delete
Sunday	Time 08:00 AM	Time 10:00 PM	Add Delete

Figure: Defined Working Hours

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

9.9.2 Holiday Configuration

The Voice-Admin can enable Holiday at system level under this option by sliding the holiday configuration bar towards right. If this is not enabled, then holiday configuration will not be configured.

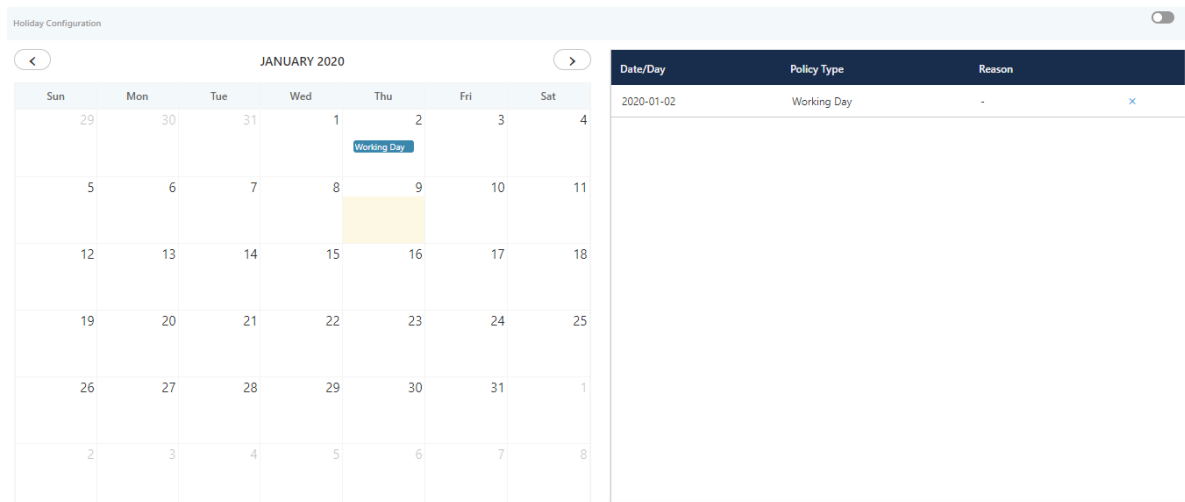


Figure: Holiday Configuration

Perform the following steps.

1. Voice-Admin can select the date from calendar to mark different days as holiday.
2. Click a day to mark that day as Holiday or Working Day using the following pop-up.

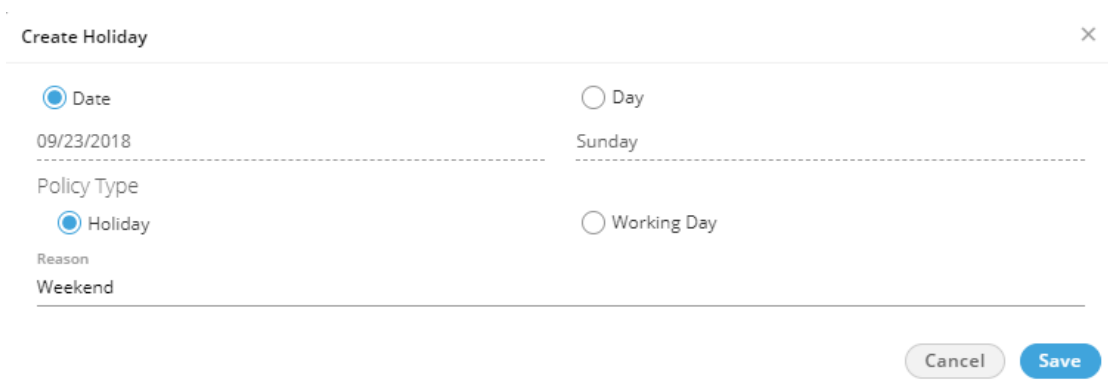


Figure: Create Holiday or Working Day

3. **Date:** Click "Date" if you only want to mark the selected date as Holiday or Working day.

After selecting it, select any of the following options.

- **Holiday:** Click it to mark the selected day as a holiday.
- **Working Day:** Click it to mark the selected day as a working day.

Click "Save" to mark it as the selected option.

4. **Day:** Click "Day" if you want to want the holiday or working day to repeat on the same day.

Create Holiday x

Date Day

09/23/2018 Sunday

Policy Type

All Days First Alternative Days Second Alternative Days

Reason

Weekend

Cancel Save

Figure: Create Reoccurring Holidays

After selecting it, select any of the following options.

- **All:** Select it to mark all days in the month as the holiday.
- Holiday on an alternate day means if the holiday is marked on the first week then the next holiday on the same day will be on the third week. There will be no holiday in the second week on the selected day. Here, you can select whether to start alternate holidays on the first week or second week.

- **First Alternate Days:** Select it to start the alternate holidays on the selected day from the first week itself.
 - **Second Alternate Days:** Select it to start the alternate holidays on the selected day from the second week itself.
5. Provide a reason to create a holiday or weekday.
 6. Click "Save" to save the day.

Rather, you can click "Cancel" to discard it. The selected holiday will be listed on the right side section.

Following is a sample screenshot.

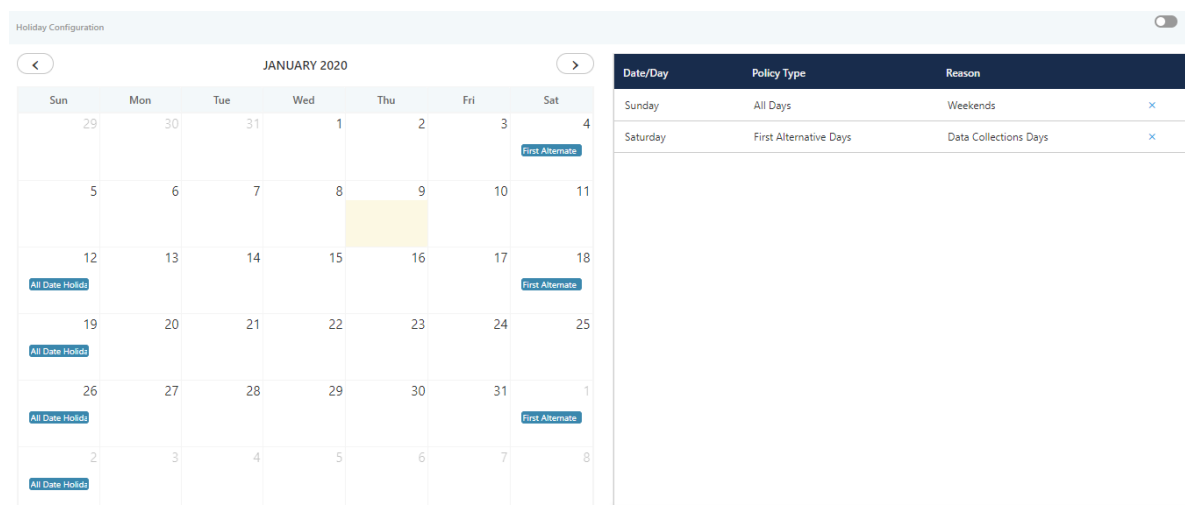


Figure: Created the holidays

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

9.9.3 Holiday Office Hour Restriction in Non-Office Hours

In cases where the agent schedules a callback call beyond the office hour timing, the callback calls fail, which leads to a high count in the failed callback attempt. Also, when the operations team does not want to initiate or handle callback and inbound/outbound calls together, a window where they can define the callback start and end time for scheduling the

callback calls is very useful. Holiday/Non-office hours configuration are provided for callback calls. Voice-Admin can configure the same at both system and campaign level. If the configuration is done at both levels, then the campaign-level configuration overrides the system-level configuration.

Administrator can perform the following actions:

1. Add and edit callback hours

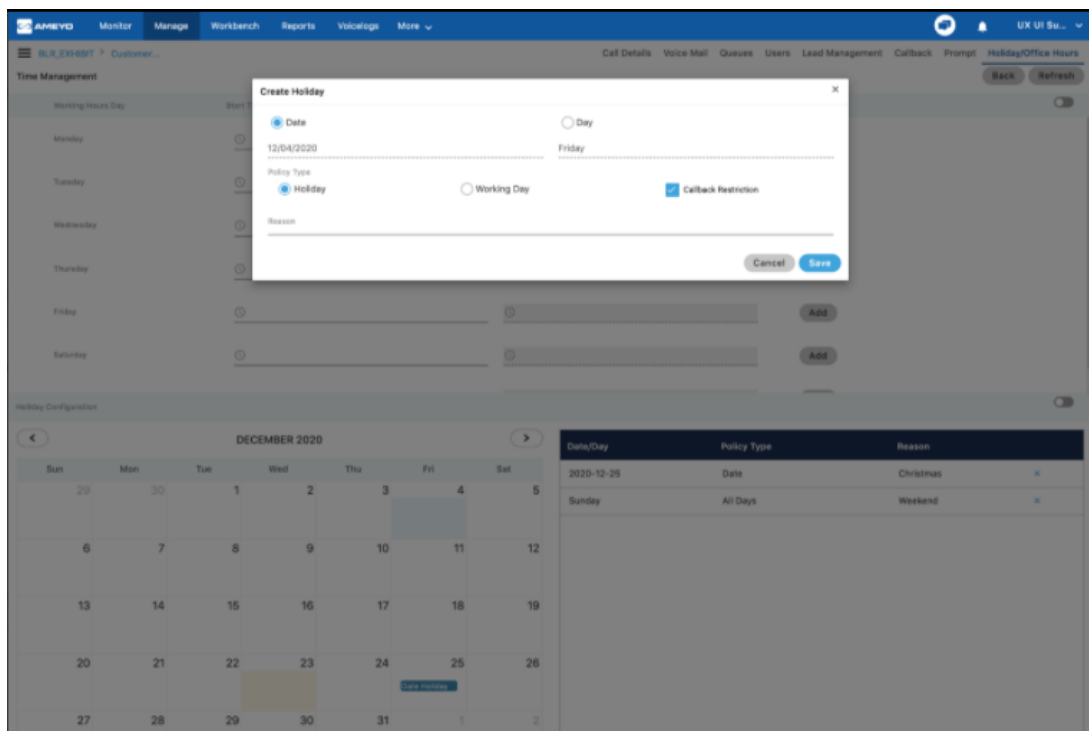


Figure: Adding or Editing Callback Hours

2. Add/edit holiday configuration as per the calendar date.
3. Copy these settings in other campaign(s) in the same process.

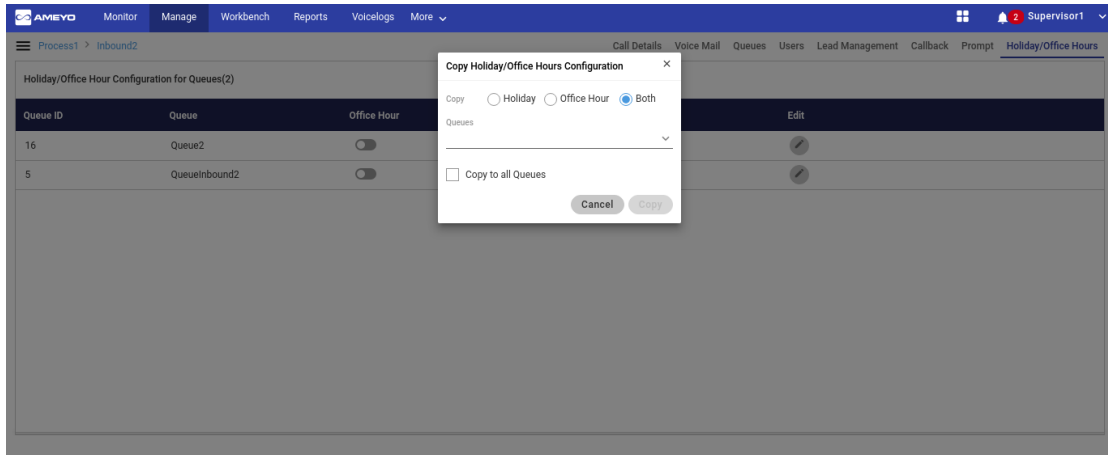


Figure: Copying Callback Configuration

For both agent and supervisor, when adding a callback, if the agent selects a time that is marked as holiday/non-office hours, then the holiday dates are disabled on the calendar and an error message is displayed. In case a callback is scheduled and later the administrator changes the holiday/non-working hours so that the call scheduled time falls under the non-permissible time, then the callback is initiated in the next working hour.

10. Campaign Settings

10.1 Settings of All Campaigns

"Process Tab" in the Voice-Admin Console contains the settings of all processes and campaigns. The Process Settings has been explained earlier.

The Campaign Settings is actually divided into the multiple tabs located in the top right side. The user interface, and the visibility and settings of these tabs actually depends upon the type of campaign you have selected in the Left Side Navigation Bar.

Click the following links to know about the interface of this tab for each campaign type.

1. Chat Campaign Settings
2. Interaction Campaign Settings
3. [Interactive Voice Application Campaign Settings](#)
4. [Outbound Voice Campaign Settings](#)
5. Parallel Predictive Voice Campaign Settings
6. [Voice Blast Campaign Settings](#)

10.2 Interactive Voice Application Campaign Settings

10.2.1 Interactive Voice Application Campaign Settings

In the left navigation bar of Process Tab, you can select an Interactive Application Campaign to view its settings.

The changes made in settings of one Interactive Voice Application Campaign will be applicable to that campaign itself. They will not be applicable on other similar (interactive voice application) and different (non-interactive voice application) campaigns.

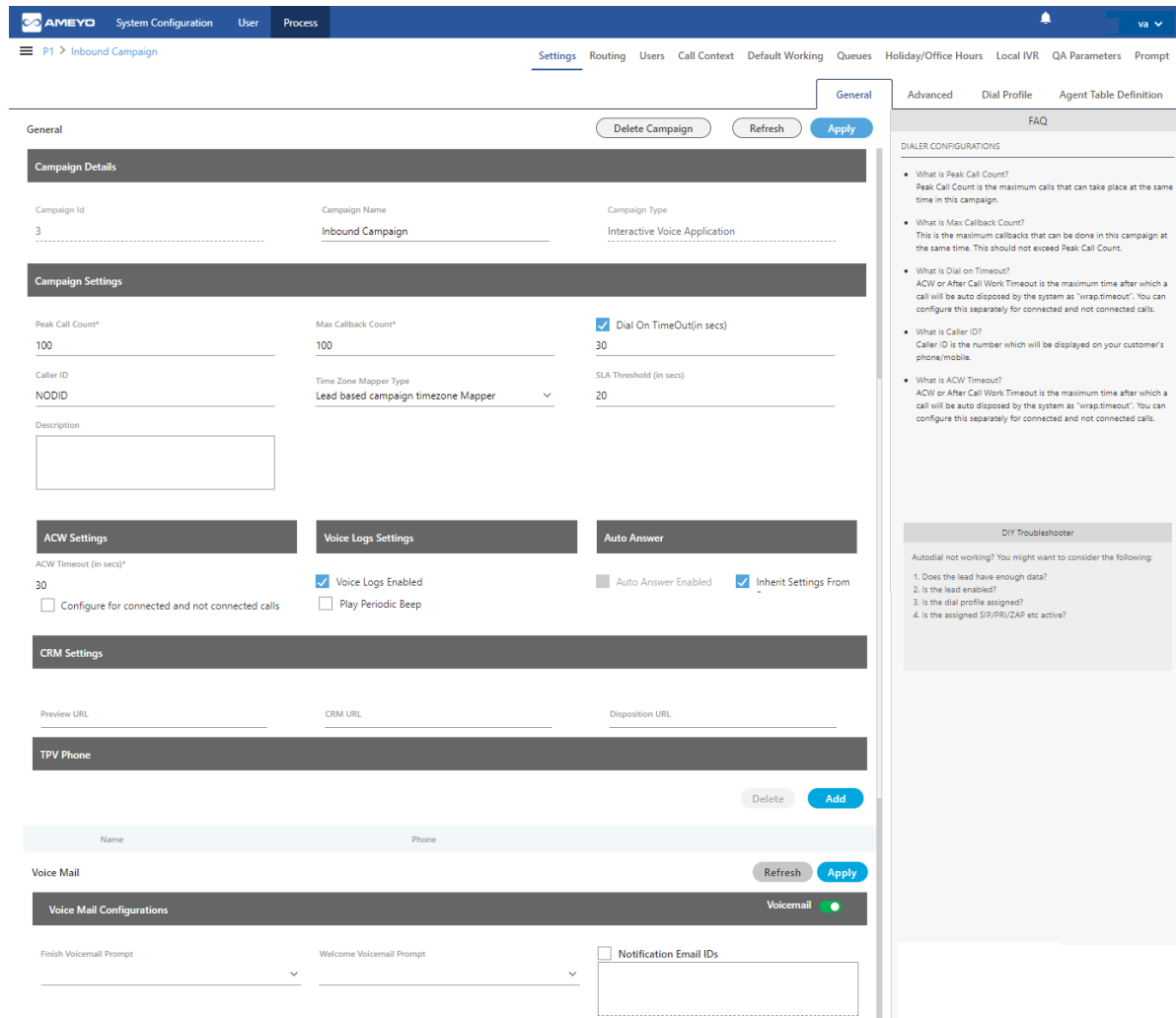


Figure: Settings of Interactive Voice Application Campaign

It contains the following tabs.

- Settings
 - General Settings
 - Advanced Settings
 - Dial Profile Settings
 - Agent Table Definition
- Queues

- Routing
- Users
- Default Working
- Holiday/Office Hours
- Call Context
- Local IVR
- QA Parameters
- Prompt

10.2.1.1 [Settings Tab](#)

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

10.2.1.1.1 [General Settings](#)

Here, the General Settings are divided into the following sections.

10.2.1.1.1.1 [Campaign Details](#)

These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.

10.2.1.1.1.2 [Campaign Settings](#)

Except for the following, it contains those settings, which you have configured while creating this campaign.

- **Dial On Time out (In seconds):** Select it to define the dial on time-out.
With these settings, the dialed calls will be disconnected after the provided seconds if not connected.

- **SLA Threshold (In Sec):** Here, you can specify the threshold in which the inbound calls should be answered ideally.

- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.

- **Auto Answer Settings:** Auto-Answer Feature is already available for WebRTC with or without Ameyo SIP Agent Proxy. This feature did not require the implementation of "Accept-Reject" node in the Nodeflow to show the prompt at Ameyo User Console before answering the call.

However, "Accept-Reject Node" was providing the Auto-Answer Configuration at the campaign-level and this feature was missing in Auto-Answer Feature for WebRTC.

"Auto-Answer" section contains the following options and only one option will work at a time.

1. **Inherit from Parent:** Select this option to inherit the Auto-Answer Configuration in the campaign from the System-level. If the Auto-Answer is disabled at the System-level, then it will remain disabled at the Campaign-level. If the Auto-Answer is enabled at the System-level, then it will remain enabled at the Campaign-level.
2. **Auto Answer Enabled:** It will enable "Auto-Answer" at the Campaign-level forcefully even if it is disabled at the system-level. Refer to the following screenshot.

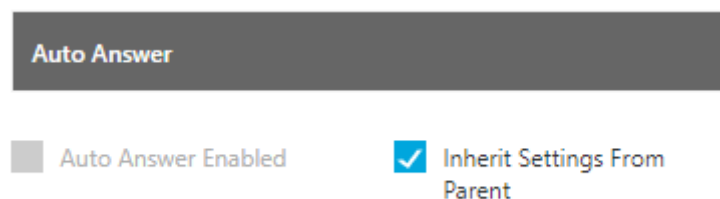


Figure: Auto-Answer Enabled

- **TPV Phone:** As per the process requirement, there may be a few numbers to which transfer of calls is very frequent. Third-party verification (TPV) number is used to transfer the call to the verifier. Here, such frequently used TPV numbers are added so that the user can directly transfer the case to these numbers.

TPV Phone	
Name	Phone
<input type="checkbox"/> TPVPhone1	118263

Figure: TPV Phone

Click "Add" to show a row to add TPV Phone number. Enter the name and phone number. You can add multiple TPV Numbers. To delete a TPV phone number, click its checkbox to select it and click "Delete".

- **Voicemail Configuration:** Perform the following steps to enable the voicemail feature on the queue level. If this is not enabled, then voicemails will not be recorded.
Make sure to upload the Prompts through "Prompts" tab in the campaign to use them in Voicemail.

- Click "Voicemail" toggle switch to turn it on.
- **Welcome Voicemail Prompt:** Select the welcome voicemail prompt from the drop-down field.
- **Finish Voicemail Prompt:** Select the finish voicemail prompt from the drop down field.

Figure: Voicemail Configuration

- **Notifications Email IDs:** Check "Notification Email IDs" to send the voicemail notifications to the selected recipients. After enabling it, enter the email addresses (only Gmail domain) of the recipient's Voice-Admin

separated by comma. For example: email1@gmail.com,
email2@gmail.com.

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

[Click here](#) to know more about the Campaign Details and CRM Settings for this campaign.

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

10.2.1.1.2 Advanced Settings

Here, the Voice-Admin can configure the Advanced Settings of an Interactive Voice Application Campaign.

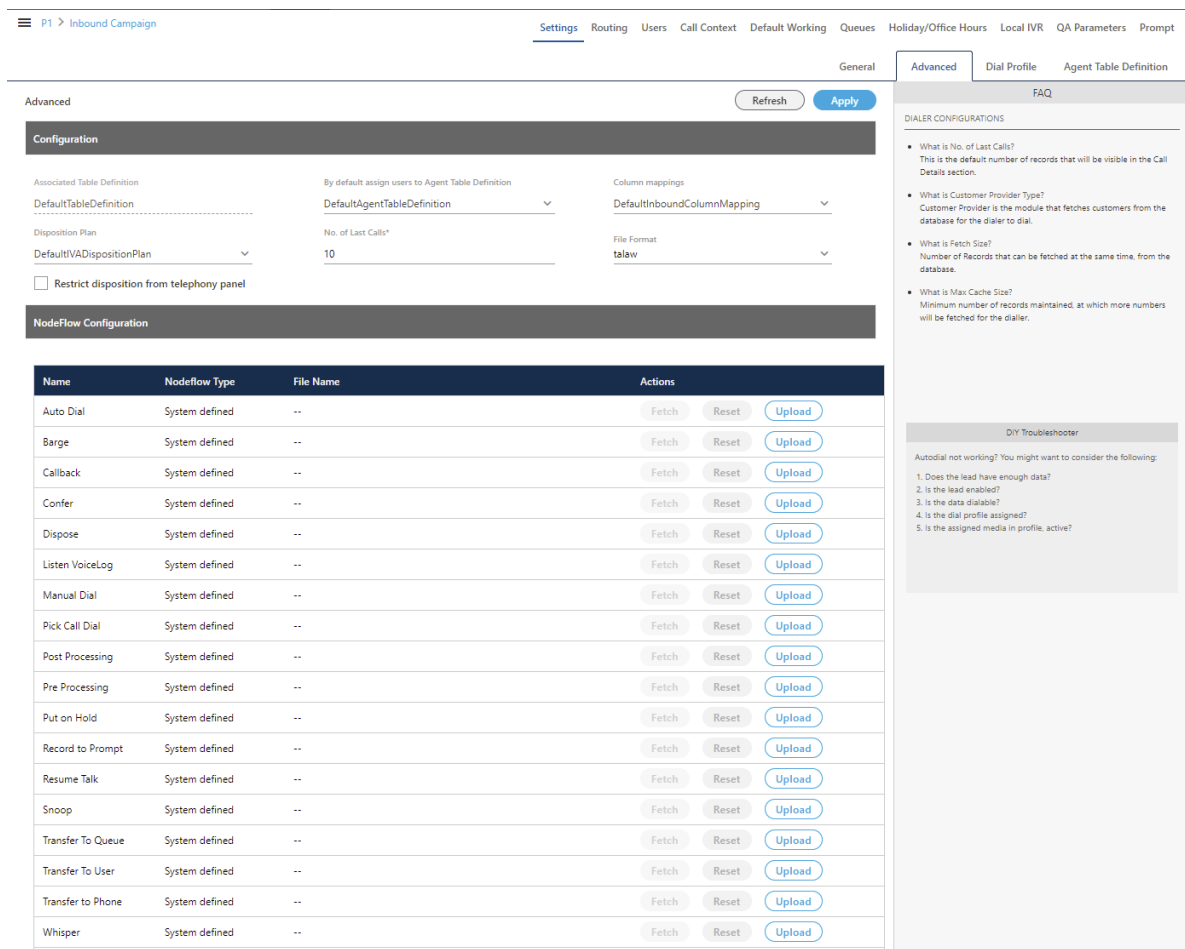


Figure: Advanced Settings

This tab can be divided into two sections - "Configuration" and "NodeFlow Configuration".

10.2.1.1.2.1 [Configuration](#)

It contains the following settings, which you have configured while creating the campaign.

- Disposition Plan
- Column Mapings
- No. of Last Calls
- File Format

It also contains the following settings, which you can configure after creating the Interactive Voice Application Campaign.

- **Default Table Definition:** Here, you can select the default Table Definition for this campaign.
- **By default assign users to Agent Table Definition:** Here, you can select the default Agent Table Definition for this campaign.

10.2.1.1.2.2 [Nodeflow Configuration](#)

"NodeFlow Configuration" lets you upload the nodeflow for the different functions listed herein below.

- Transfer to User
- Manual Dial
- Transfer to Phone
- Confer
- Dispose
- Barge

- Snoop
- Put on Hold
- Resume Talk
- Transfer to Queue
- Callback
- Listen VoiceLog
- Pick Call Dial
- Record to Prompt
- Post Processing
- Whipser
- Pre Processing
- Auto Dial

10.2.1.1.3 [Dial Profile Settings](#)

Here, the Voice-Admin can create the dial profiles for the campaigns using the Routing Plans. So, it is necessary to create the Routing Plans first before configuring this tab.

Before creating a routing plan, you have to assign and manage the users, assign the call contexts, and create the queues.

Dial Profile

Manual Dial Profile Settings

Manual Dial Profile Policy
Select

Call Context

Ringing TimeOut(in secs)
30

Set up TimeOut (in secs)
15

Confer Dial Profile Settings

Confer Dial Profile Policy
Select

Call Context

Ringing TimeOut(in secs)
30

Set up TimeOut (in secs)
15

Figure: Dial Profile Settings

Perform the following steps to configure the Dial Profile Settings for Manual Dial and Confer Dial (Conference Dial).

1. **Manual Dial Profile Settings:** It lets you configure the settings for Manual Dial Profile. Perform the following steps.
 - A. "Manual Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".
 - B. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds
 - C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

2. **Confer Dial Profile Settings:** It lets you configure the settings for Confer Dial (Dial during Conference) Profile. Perform the following steps.
 - A. "Confer Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".
 - B. **Ringling Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds
 - C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds
3. Click "Apply" to apply the dial profile for any section.

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

When you click apply, the values for Call Context for the selected Policy is populated in "Call Context" column.

Manual Dial Profile Policy	Call Context	Ringling TimeOut(in secs)
1001_basic.single.call.context.type	1001	30
Set up TimeOut (in secs)		
15		

Confer Dial Profile Policy	Call Context	Ringling TimeOut(in secs)
1111_basic.single.call.context.type	1111	30
Set up TimeOut (in secs)		
15		

Figure: Configured Dial Profile Settings

10.2.1.1.4 [Agent Table Definition](#)

This tab allows you to select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition. [Know more...](#)

10.2.1.2 [Users](#)

Here, you can assign and unassign the users to this campaign. [Know more...](#)

10.2.1.3 [Queues](#)

Here, you can create and manage the queues. [Know more...](#)

10.2.1.4 [Default Working](#)

Here, you can select the users who will be logged in to this campaign, by default, and will not receive the prompt to select the campaign. [Know more...](#)

10.2.1.5 [Holiday/Office Hours](#)

Here, you can define the holidays, office hours, and non-working hours for this campaign. This tab has already been explained in "System Configuration". [Know more...](#)

10.2.1.6 [Other Settings](#)

Other Settings are explained in the following subsequent pages. Click the links to know more about them.

- [Call Contexts](#)
- [Routing](#)
- [Local IVR](#)

- [QA Parameters](#)
- [Prompt](#)

10.2.2 Call Context in a Campaign

Call context is basically the SIP channel that is visible and will be used by the agent to initiate the calls. This Tab lets you assign and unassign the call contexts to this campaign, which you have created in Call Manager.

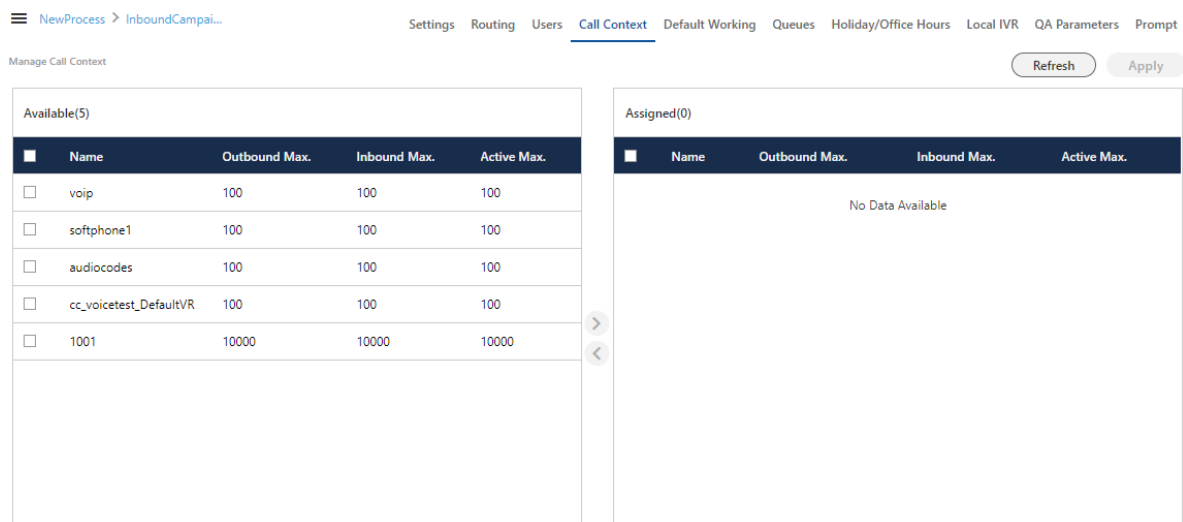



Figure: Call Context Settings

Perform the following steps to assign call contexts to this campaign.

1. Select the call contexts in "Available Call Contexts" section
2. Click  icon to proceed to assign the selected call contexts.

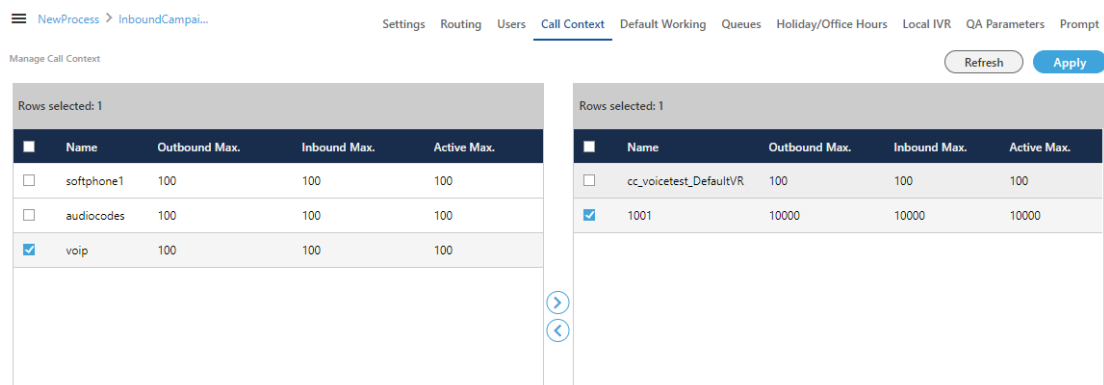


Figure: Assign or Unassign Call Contexts

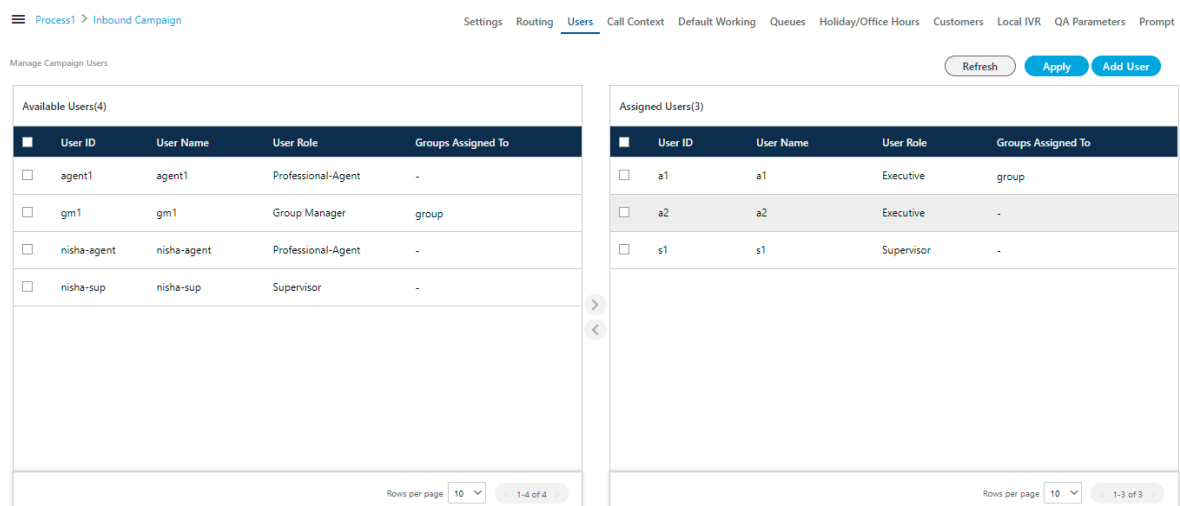
3. Click "Apply" to assign the call contexts to this campaign.

Rather, you can click "Refresh" to not assign the Call Contexts.

To unassign a call context, select it in "Assigned Call Contexts" section, click  icon, and click "Apply" to unassign the selected call context from the campaign.

10.2.3 User Management in Campaign

You have assigned the users in the campaign while creating it. Now, you can use "Users" tab to unassign and assign the users in the campaign.



The screenshot shows the 'Manage Campaign Users' interface. At the top, there is a navigation bar with 'Process1 > Inbound Campaign' and a menu of options: Settings, Routing, Users, Call Context, Default Working, Queues, Holiday/Office Hours, Customers, Local IVR, QA Parameters, and Prompt. Below the navigation bar, there are three buttons: 'Refresh', 'Apply', and 'Add User'. The main area is divided into two panels: 'Available Users(4)' and 'Assigned Users(3)'. Both panels have a table with columns: User ID, User Name, User Role, and Groups Assigned To. The 'Available Users' table lists four users: agent1 (Professional-Agent), gm1 (Group Manager), nisha-agent (Professional-Agent), and nisha-sup (Supervisor). The 'Assigned Users' table lists three users: a1 (Executive, group), a2 (Executive, -), and s1 (Supervisor, -). At the bottom of each table, there is a 'Rows per page' dropdown set to 10 and a page indicator (1-4 of 4 for available users, 1-3 of 3 for assigned users).


Figure: User Management

You have to perform the same steps here, which you have performed to assign or unassign users while creating the campaign.

Perform the following steps.

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

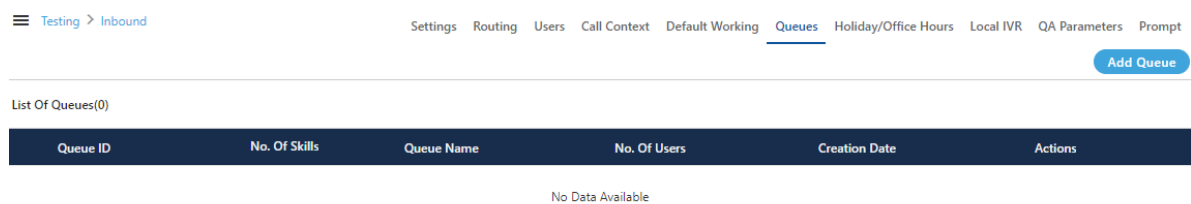
You can also search for the user names in the provided search box.

2. Click  icon to add the selected users.

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

10.2.4 Queue Management in Voice Campaign

Queues Tab in the Voice Campaign Settings allows you to create and manage the queues.



Queue ID	No. Of Skills	Queue Name	No. Of Users	Creation Date	Actions
No Data Available					

Figure: Queues Tab

10.2.4.1 Create Queue

Perform the following steps to create a queue.

1. Click "Add Queue" button on the top right corner to create a queue. It shows the following page.

Figure: Create Queue

2. Provide a name for the queue.
3. Select a value for the queue priority. This value will be used for "Priority" type queues.
4. **Request Queue Type:** It lets you define which customer customer will be served first if more than one customers are waiting in the queue.
 - A. **Queue FIFO:** FIFO stands for First In First Out. If request queue type is FIFO and two customers are waiting in queue for agent, the customer who is first to reach in the queue would be connected first to the available agent.
 - B. **Queue Priority:** Nodeflow can be used to decide the priority of any customer. Queue with "1" priority will be selected first. Similarly, Queue with "2" priority will be selected at the second place.


Example:

Question: If customer1 (who reached earlier) is waiting in Queue1 having priority 1 and customer2 (who reached late) is waiting in the Queue2 having priority 2, and if only one agent is serving both queues, then what will happen? Let us go through the following table.


Queue	Queue Priority	Customer	Agent
Queue1	1	Customer1	Agent1
Queue2	2	Customer2	Agent1

- C. **Answer:** In such a scenario, Agent1 will be connected first with "Customer1" as its queue - Queue1 - has higher priority.

5. **Resource Scheduler Type (Licensable):** It will let you decide which agent would be connected to the customer when two agents are available to take the chat or call. Select any of the following options.
- A. **LRU:** It stands for "Least Recently User". As per this algorithm, the communication (chat or call) will be connected to the agent who has been used very least recently.
 - B. **Multiple Extension (Licensable):** Select it if the agents have multiple extensions and they are supposed to attend multiple communications (chat or call) simultaneously. One agent can be connected to two customers in the same queue.
 - C. **Multimedia Based:** Select it only if the agents have to take chat and Inbound calls simultaneously.

- D. **Skill Based:**Select it to connect the communication (chat or call) to that agent who have more skill level than others.
6. **Transferable:** Select it to transfer the communication call or chat from this new queue to another queue.
 7. Provide a description for the queue.
 8. **Assign Users in Queue:** Select the users in "Available Users" section and click  icon.

To unassign a user, select the users in "Assigned Users" and click  icon.

9. **Assign Skills in Queue:** select the skills in "Available Skills" section and click  icon.

To unassign a skill, select the skills in "Assigned skills" and click  icon.

Queue1 Cancel Apply

Queue Details

Queue Name: Queue1 | Request Queue Type: Queue FIFO | Resource Scheduler Type: LRU

Transferable: Yes No | Description:

SLA Configuration

Keep same as campaign (Configured Threshold for SLA: 20 Seconds)

Users in Queue

Available Users(1)				Assigned Users(3)			
<input type="checkbox"/>	User ID	Username	User Role	<input type="checkbox"/>	User ID	Username	User Role
<input type="checkbox"/>	analyst	analyst	Analyst	<input type="checkbox"/>	a2	a2	Professional-Agent
				<input type="checkbox"/>	s1	s1	Supervisor

Skills in Queue

Available Skills(1)		Assigned Skills(0)	
<input type="checkbox"/>	Name	<input type="checkbox"/>	Name
<input type="checkbox"/>	Good		No Data Available

Figure: Sample Details to create a Queue

10. Click "Apply" to create the queue.

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

You can create multiple queues using these steps.

☰ P1 > Inbound Campaign Settings Routing Users Call Context Default Working Queues Holiday/Office Hours Local IVR QA Parameters Prompt [Add Queue](#)

List Of Queues(1)

Queue ID	Queue Name	No. Of Skills	No. Of Users	Creation Date	Actions
<input type="checkbox"/> 1	q1	0	3	Wed Jul 08 15:53:43 GMT+05:30 2020	Edit

Figure: List of Queues

10.2.4.2 Edit Queue

Click "Edit" icon present in the list of the queues. The same page opens which opens at the time of the queue creation. You can change all the information entered at the time of the queue creation.

Cancel Apply

Queue1

Queue Details

Queue Name
Queue1

Request Queue Type
Queue FIFO

Resource Scheduler Type
LRU

Transferable
 Yes No

Description

SLA Configuration

Keep same as campaign (Configured Threshold for SLA: 20 Seconds)

Users in Queue

Available Users(1)

<input type="checkbox"/>	User ID	Username	User Role
<input type="checkbox"/>	analyst	analyst	Analyst

Assigned Users(3)

<input type="checkbox"/>	User ID	Username	User Role
<input type="checkbox"/>	a2	a2	Professional-Agent
<input type="checkbox"/>	s1	s1	Supervisor

Skills in Queue

Available Skills(1)

<input type="checkbox"/>	Name
<input type="checkbox"/>	Good

Assigned Skills(0)

<input type="checkbox"/>	Name
No Data Available	

Figure: Edit the Queue

10.2.4.3 Delete Queue

You can delete the queue. Select the queue, which you want to delete and then, click "Delete" button present at the right top corner of the page. A confirmation pop-up comes up.

Confirmation

Are you sure you want to delete the queue?

Cancel

Delete

Figure: Delete Queue

Click "Delete" button to confirm the deletion of the queue, else click "Cancel".

10.2.5 Local IVR in a Campaign (Licensable)

"Local IVR" is a full-fledged IVR (Interactive Voice Response) running locally. The term locally or local refers to the telephony channel on which the IVR is running. Besides the channel there is no difference in a normal IVR running on an incoming channel and a local IVR.

10.2.5.1 Examples

- If you take an example of a customer calling to book a travel ticket or a customer calling to bank, then the customer is welcomed by the main IVR of a Nested IVR. When the customer presses any option on the main IVR, a new IVR (that is a branch of main IVR) is presented.
- Sometimes the Agent confer a customer's call with IVR for taking some input directly from the customer to the system. For example, the customer wants to change the PIN of a Debit/Credit Card after connecting the call with the agent.

10.2.5.2 Business Use Case

Agent is connected with customer via inbound call, then agent confer with Local IVR for verification or payment gateway. This is done in conference so that agent can guide the customer what to do on the IVR. However the information entered by the customer is not visible to the agent anywhere.

10.2.5.3 Local IVR Tab in Voice Campaign Settings

"Local IVR" Tab in Interactive Voice Application Campaign Settings lets the Voice-Admin create the Local IVRs.

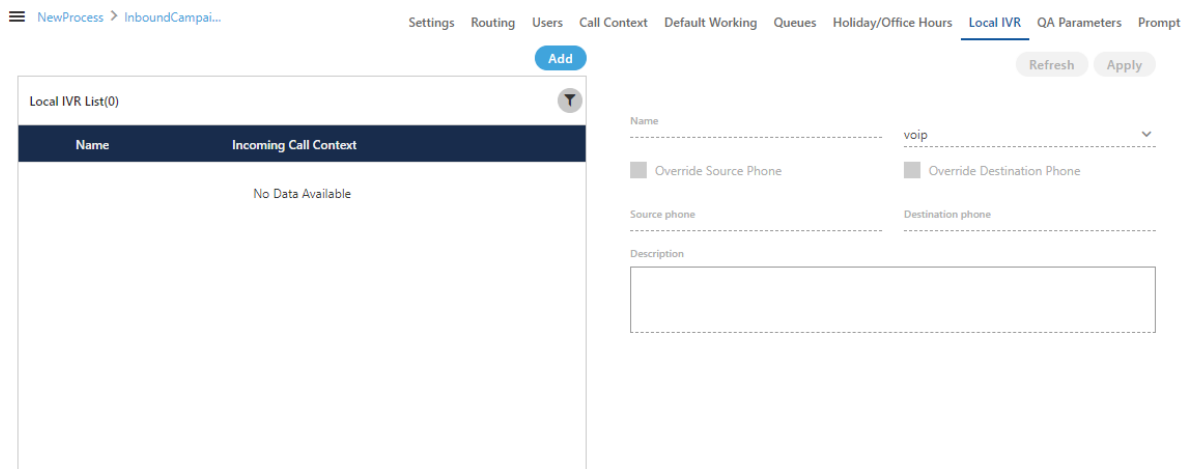


Figure: Local IVR Tab

10.2.5.4 Add a Local IVR

Perform the following steps to add a Local IVR.

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

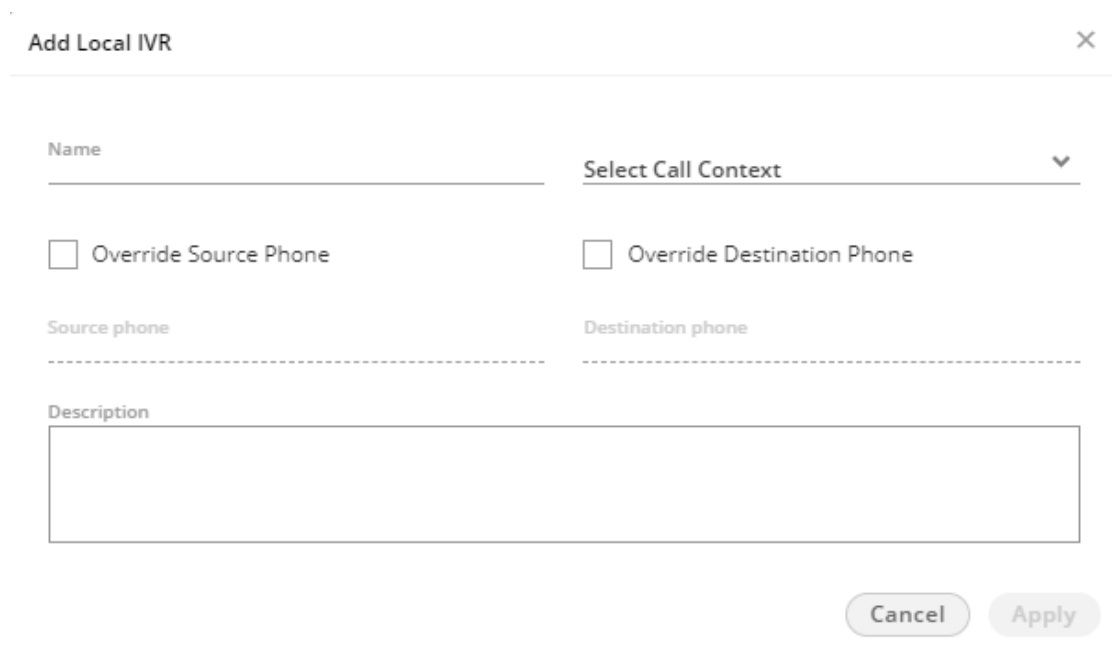


Figure: Add a Local IVR

2. Provide a name for the new IVR.

3. "Call Context" drop-down menu lists all Call Contexts that you have assigned to this campaign. Select anyone of them.
4. Select "Override Source Phone" option to override the source number (from which a call is being received) of the incoming call with the provided number. After checking it, provide a number in its relevant textbox.
5. Select "Override Destination Phone" option to override the destination number (to which a call is being dialled) of the outbound call with the provided number. After checking it, provide a number in its relevant textbox.
6. Provide a description in "Description" text box.

The screenshot shows a web form titled "Add Local IVR" with a close button (X) in the top right corner. The form contains the following fields and options:

- Name:** A text input field containing "TestIVR".
- Call Context:** A dropdown menu with "voip" selected.
- Override Source Phone:** An unchecked checkbox.
- Override Destination Phone:** An unchecked checkbox.
- Source phone:** An empty text input field.
- Destination phone:** An empty text input field.
- Description:** A text area containing the word "Test".
- Buttons:** "Cancel" and "Apply" buttons at the bottom right.

Figure: Sample Details

7. Click "Apply" to create the local IVR using the selected call context.

Rather you can click "Cancel" to not create it
You can follow these steps to create multiple Local IVRs.

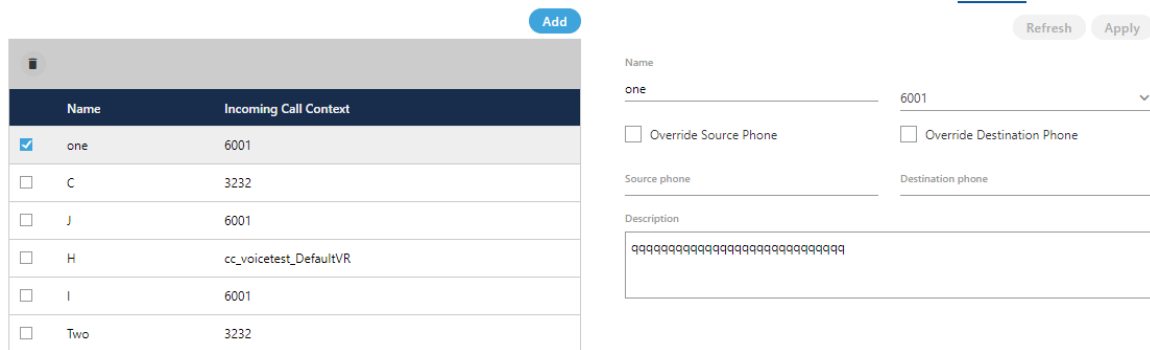


Figure: Local IVRs

10.2.5.5 Defining the Call Context at the System-level or Campaign-level

10.2.5.5.1 Scenario 1: System-level Call Routing for IVR

You have to define the Call Routing at the System-level if any of the following conditions is true.

- System-level (or Contact Center level) Call Context has been selected to add the Local IVR.
- Source Phone is specified to add the Local IVR.
- Destination Phone is specified to add the Local IVR.

Refer to ["System Call Routing" page](#) to know about the steps to create a Call Routing Plan.

10.2.5.5.2 Scenario 2: Campaign-level Call Routing for IVR

You have to define the Call Routing in "Call Routing" tab of Campaign Settings only if the above conditions specified for System-level Routing are not true. The Call Context, which is used to add the Local IVR, have to be used to create a Context Feature in "Call Routing" of Campaign Settings. Refer to ["Call Routing" page](#) to know the steps to create a Call Routing in the Campaign Settings.

10.2.5.6 How Call Routing works with Local IVR?

Call Routing means that a call is being moved from an endpoint to another. The decisions in the Call Routing can be made using many reasons such as Caller Identification, Dialed

Number, Time of Day, and Custom Defined Parameters established in an IVR (Interactive Voice Response) program script.

In Ameyo, we use term profiles for different routing sequence. Currently, the following three types of profiles are being used.

- Source-based
- Destination-based
- Call Context-based

10.2.5.7 Important Point

The Ameyo System supports more than one "conferwithIVR" profiles to serve different types of Call Conferences as per the different business requirements.

10.2.5.8 Known Issues related to Local IVR in Ameyo

- Local IVR is not supported for Outbound Campaigns.
- The Agent can only confer the call with Local IVR. The Agent cannot transfer the call to the IVR.

10.2.5.9 Modifying an IVR

Perform the following steps to modify an existing Local IVR in the Campaign Settings.

1. In "Local IVR" tab, select a Local IVR to view its details in the right panel.

The screenshot displays the 'Local IVR' configuration interface. On the left, a table lists several profiles. The 'one' profile is selected, and its details are shown in the right-hand panel.

Name	Incoming Call Context
<input checked="" type="checkbox"/> one	6001
<input type="checkbox"/> C	3232
<input type="checkbox"/> J	6001
<input type="checkbox"/> H	cc_voicetest_DefaultIVR
<input type="checkbox"/> I	6001
<input type="checkbox"/> Two	3232

The details panel for the 'one' profile includes the following fields:

- Name: one
- Incoming Call Context: 6001
- Override Source Phone:
- Override Destination Phone:
- Source phone: _____
- Destination phone: _____
- Description: Description here

Figure: Sample Details

2. You can change the following fields while modifying a local IVR.
 - Name

- Call Context
- Enable or disable the option to override the Source Phone
- Already provided Source Phone Number
- Enable or disable the option to override the Destination Phone
- Already provided Destination Phone Number
- Description
 - If the System-level Call Routing Plan is created based upon the Call Context, Source Phone Number, or Destination Phone Number, then Call Routing will not work for this IVR if you change any of these fields.
 - If the Campaign-level Call Routing Feature is created based upon the Call Context, then the Call Routing will not work for this IVR if you change the Call Context.

3. Validate the changes carefully as the Call Routing can be disabled for this Local IVR if any change is made to Call Context, Source Phone, or Destination Phone.

4. Click "Apply" to apply the changes.

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

Delete an existing Local IVR

- The Deleted Local IVR will not be played at the assigned Call Context Feature, Source Phone Number, or Destination Phone Number.
- The Deleted Local IVR cannot be restored using any method.

Sometimes an existing Local IVR becomes obsolete and it has to be replaced with an all new IVR. If you are planning to delete an IVR, then you have to plan properly before going ahead as the deleted IVR will not be played in the Call Flow.

Perform the following steps to delete a Local IVR.

1. In "Local IVR" tab, select a Local IVR to view its details in the right panel.

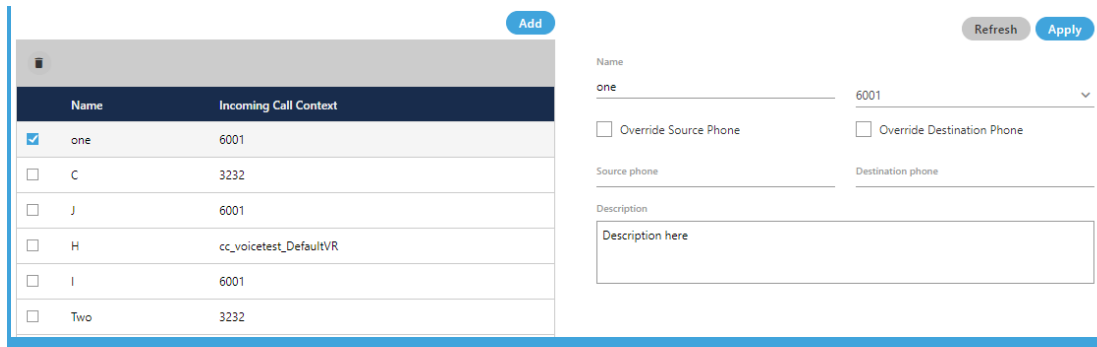


Figure: Sample Details

2. Click "Delete" button in the top right section. It shows the following warning message.

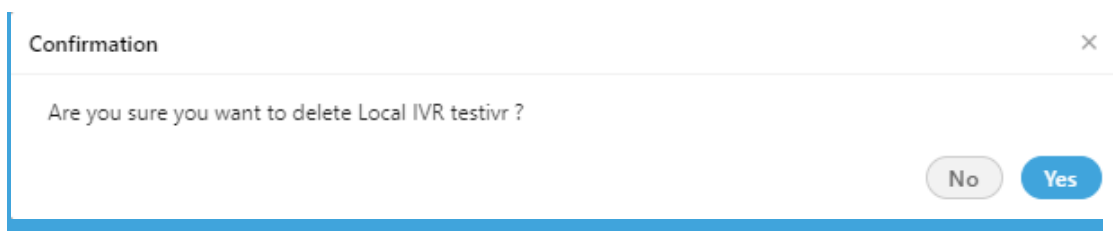


Figure: Warning before deleting an IVR

3. Click "Yes" to delete the local IVR.
 Rather, you can click "No" to not delete the Local IVR.

More Information

Refer to the following document to know more about the Local IVR.

Configuration

Document:

<https://sites.google.com/a/ameyo.com/engineering/Home/certificationknowledgebase/local-ivr-testing-in-4-x>

10.2.6 QA Parameters in a Campaign

This Tab lets you assign and unassign the QA Parameters to this campaign, which you have created at the System Level. Refer to ["QA Parameters" in System Configuration](#) to know the steps to create the QA Parameters.

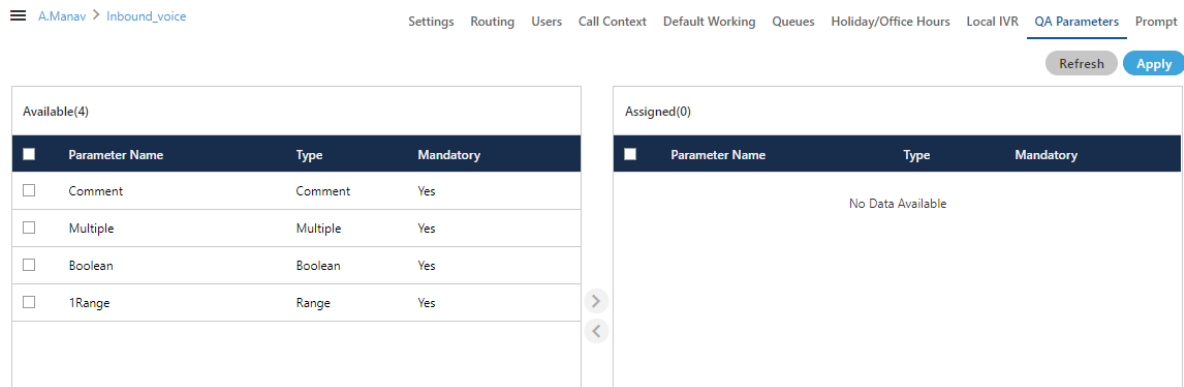



Figure: QA Parameters

Perform the following steps to assign QA Parameters to this campaign.

1. Select the QA Parameters in "Available" section
2. Click  icon to proceed to assign the selected QA Parameters.

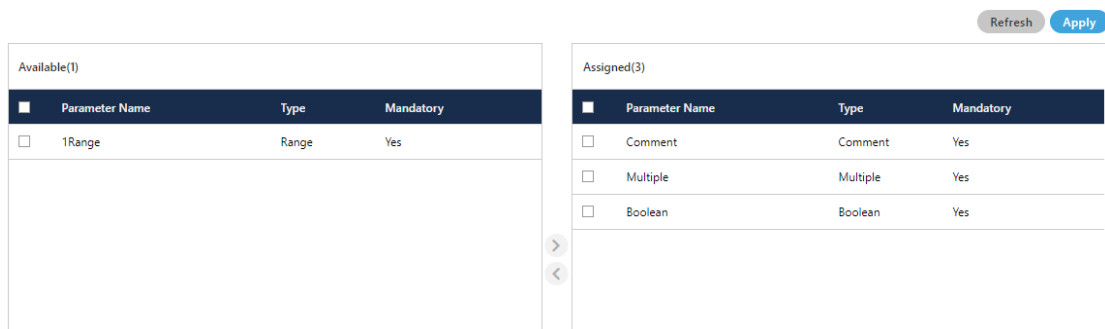



Figure: Assign or Unassign QA Parameters

3. Click "Apply" to assign the QA Parameters to this campaign.

Rather, you can click "Refresh" to not assign the selected parameters.

To unassign a QA Parameter, select it in "Assigned" section, click  icon, and click "Apply" to unassign the selected QA Parameter from the campaign.

10.2.7 Prompts in a Campaign

This Tab allows you to create the Voice Message Prompts for the campaign. The prompts can be created using the existing voice recordings saved in .wav or .mp3 formats.

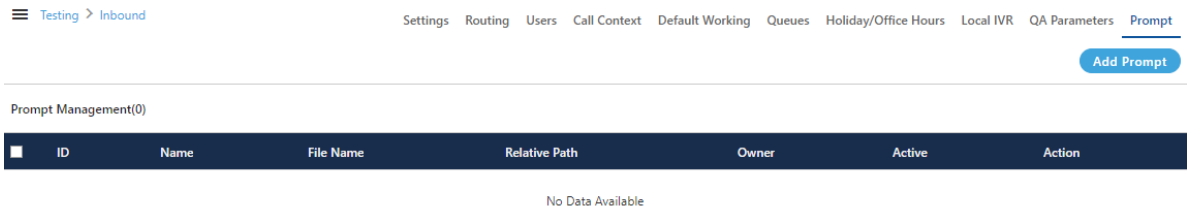


Figure: Prompt Management

10.2.7.1 Add a Prompt

Perform the following steps to create a Prompt.

1. Click "Add Prompt" button in the top right corner. It shows the following pop-up.

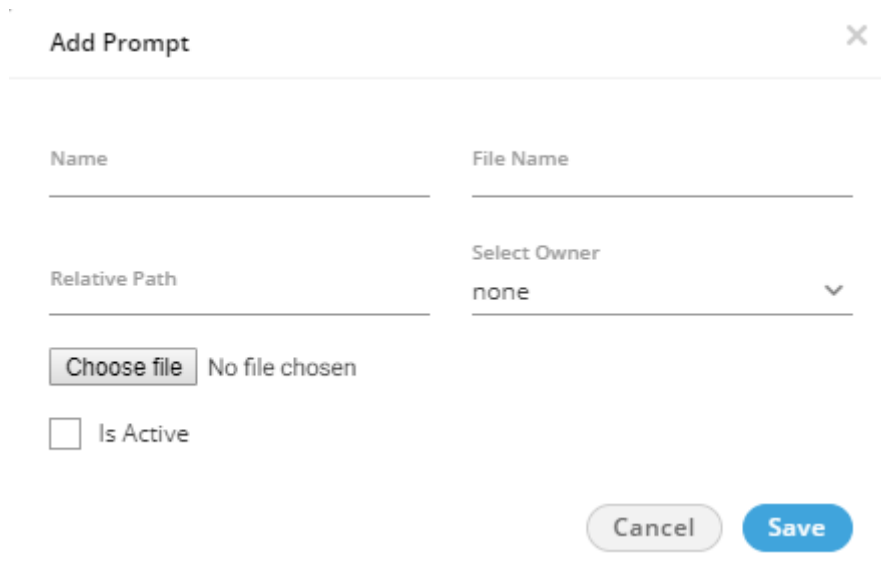
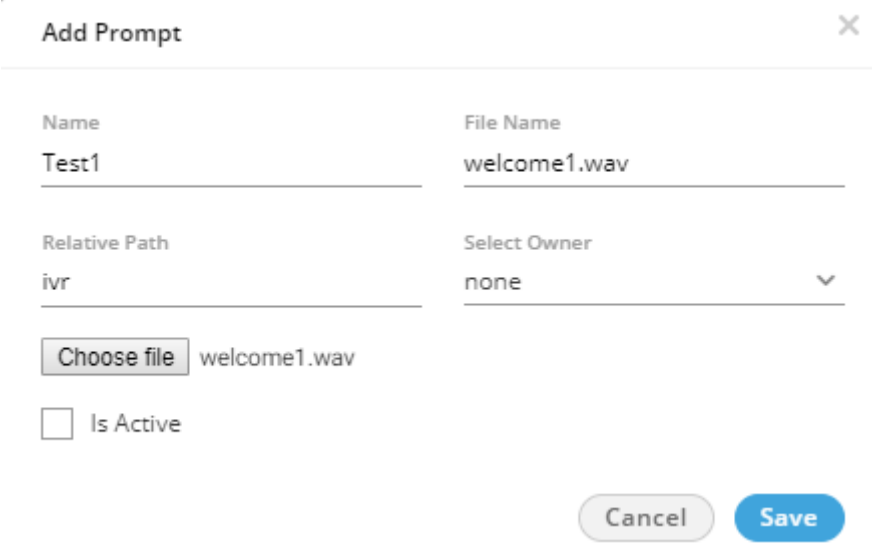


Figure: Add a Prompt

2. Provide a name for the prompt.
3. Provide a name for the sound file, that you are going to upload.

4. Provide a name for a folder, in which the sound file will be stored. This folder will be created on server and if it exists already, the file will be saved into it.
5. Click "Choose File" to select the sound file on your disk.
6. Check "Is Active" to make this new prompt as Voice Prompt. Else uncheck it to disable it.

Following is a screenshot containing sample details.



The screenshot shows a dialog box titled "Add Prompt" with a close button (X) in the top right corner. The dialog contains the following fields and controls:


Name	File Name
Test1	welcome1.wav
Relative Path	Select Owner
ivr	none

Below the table, there is a "Choose file" button followed by the text "welcome1.wav". At the bottom left, there is a checkbox labeled "Is Active" which is currently unchecked. At the bottom right, there are two buttons: "Cancel" and "Save".

Figure: Adding Prompt with Sample Details

7. Click "Save" to create the Prompt message.

Rather, you can click "Cancel" to not create a prompt.
You can create multiple prompts using these methods.



Settings Routing Users Call Context Default Working Queues Holiday/Office Hours Local IVR QA Parameters Prompt

Add Prompt

Prompt Management(2)

ID	Name	File Name	Relative Path	Owner	Active	Action
2	Busy	busy.wav	ivr		No	Edit
1	Test	welcome.wav	ivr		No	Edit

Figure: Added Prompts

10.2.7.2 Compatibility List

The Voice-Admin can upload the prompts in MP3 and Wav format. The following are the supported compatibility list that the Voice-Admin can use.

- **MP3:**
 - cbr mp3
 - vbr mp3
 - 144kbps mp3
 - 256kbps mp3
- **Wav:**
 - PCM with any sampling rate (Hz) or bitrate (bits per sample * sampling rate)
 - Size: Up to 25 MB only

The call server will play only .wav files with 16-bit sample size, 8000 Hz, and mono-channel. Hence, as soon as you upload the prompt file, it gets converted to a call server compatible format. While adding a prompt, "File Name" field is used to store the prompt with the specified name on the call servers. Hence specify the name with extension .wav. Suppose the Voice Admin has provided the prompt name as "test", then the system will suffix ".wav" to that prompt name in "File Name" field automatically. If you specify any other extension, then an error message is displayed. This behavior keeps the user experience backward compatible, and the existing users shall not need to learn the usage again.

10.2.7.3 Edit Prompt

Click "Edit" link under "Action" column header for any prompt to edit it. It shows the following pop-up.

Name	File Name
Busy	busy.wav
Relative Path	Select Owner
ivr	none

No file chosen

Is Active

0:00 / 0:01

Cancel Save

Figure: Edit a Prompt

You cannot make any change here. The prompt name, file name, or path (where it is stored) cannot be changed. You can either play the uploaded file or click menu icon to download it.

You can select a prompt and click "Delete" button on top right corner to delete. However, the deleted prompts cannot be restored.

10.2.8 Configure Default Working in Campaign

If a user is assigned to multiple campaigns, then it has to select the campaigns in which it wants to login during its logon to the system.

"Default Working" Tab in a Campaign lets you select the Default Campaign for the selected users. These users will not be prompted to select the campaign and will be logged on to this campaign by default.

Process1 > Inbound Campaign

Settings Routing Users Call Context Default Working Queues Holiday/Office Hours Customers Local IVR QA Parameters Prompt

Refresh Apply

Default Working(3)

User ID	User Role	Default Working
a1	Executive	<input type="checkbox"/>
a2	Professional-Agent	<input type="checkbox"/>
s1	Supervisor	<input type="checkbox"/>

Figure: Set Default Working

You just have to select "Default Working" checkboxes for the users which you want to logon in this campaign by default. Click "Apply" to apply this change.

10.2.9 Routing in a Voice Campaign

10.2.9.1 Routing in a Voice Campaign

Here, you can create and manage the routing for both Inbound and Outbound Calls in Interactive Voice Application Campaign, Outbound Campaign, and Parallel Predictive Campaign.

Testing > TestInbound

Settings Routing Users Call Context Default Working Queues Holiday/Office Hours Local IVR QA Parameters Prompt

Inbound: Feature Context Default ACD Feature Context

Delete Refresh Add Apply

context id	Context Flow Name	Node Flow Name	Transferable	Assignment
------------	-------------------	----------------	--------------	------------

Outbound: Feature Context

Delete Refresh Add

Policy Id	Policy Type	Name	Last Updated	Assignment
-----------	-------------	------	--------------	------------

Figure: Routing

10.2.9.1.1 Routing for Inbound

10.2.9.1.1.1 Add a Nodeflow for Routing

Perform the following steps to create a nodeflow.

1. Click "Add" button to create a nodeflow. It shows a new row in the white area just below the column header.

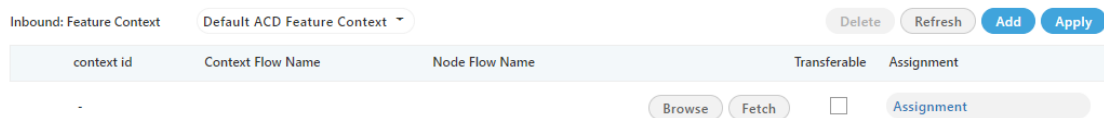


Figure: Add Context Flow

2. Provide a name for the context flow.
3. In "Node Flow Name" column, you have to upload either a .nodeflow or .anfx flow.

Service Engineer will provide you the required nodeflow files.

Click "Browse" to open a nodeflow file. Select the location where the file stored. Select the required file and click "Open".

4. Check "Transferable" if you want to transfer the call from this nodeflow to another nodeflow.
5. Click "Apply" to add the nodeflow.

10.2.9.1.1.2 Assign Nodeflow to a Queue

Perform the following steps to assign a nodeflow to a queue in the campaign.

1. Check the box to select a queue.
2. Click "Assignment" to assign this nodeflow to a queue. It shows the following pop-up.

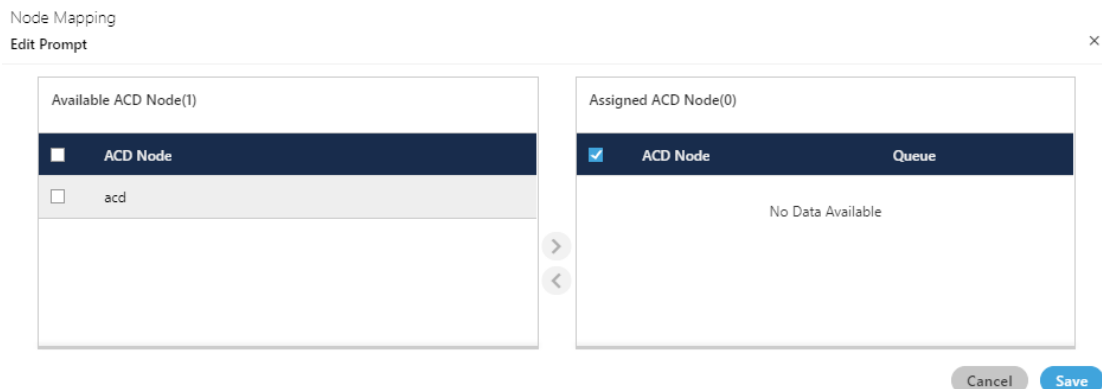



Figure: Assign Nodeflow to a Queue

3. Select "ACD" node in "Available ACD Node" section, and click  icon.
4. Select the nodeflow in "Assigned ACD Node" section.
5. In "Queue" drop-down menu, select the queue to which you want to assign this nodeflow.

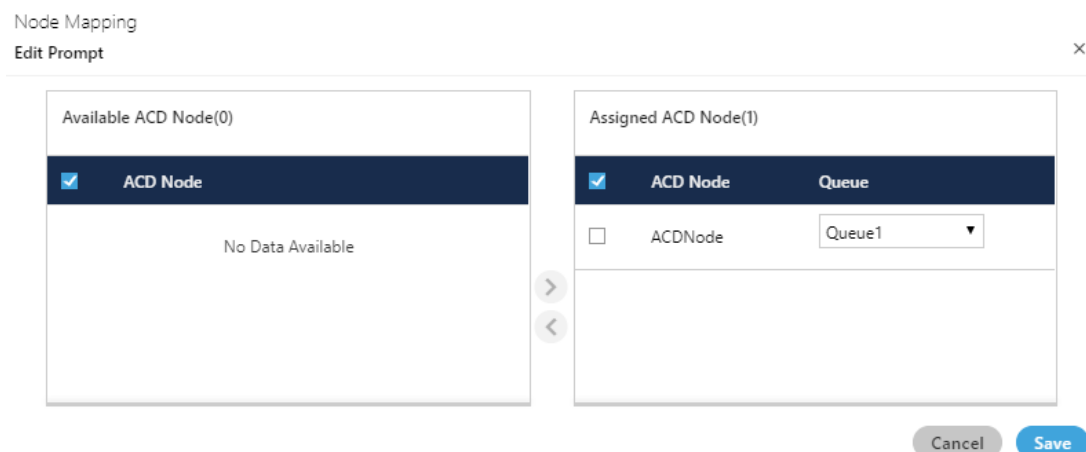


Figure: Assign Queue in ACDNode

6. Click "Save" to assign the nodeflow to the selected queue. It takes you back to "Routing" Tab.

You can perform the same steps to create the nodeflow and to assign it to a queue.

Inbound: Feature Context Default ACD Feature Context Delete Refresh Add Apply

context id	Context Flow Name	Node Flow Name	Transferable	Assignment
<input type="checkbox"/> 1	Test1	singleACD_JS_withWelcome.nodeflc	Browse Fetch	<input checked="" type="checkbox"/> Assignment

Figure: Added Nodeflows

You can fetch a nodeflow and download it as a file on the disk, assign or unassign it to a queue, and delete the nodeflow.

10.2.9.1.2 Delete Routing Policy

Select the Routing Policy for which you want to delete permanently. Click "Delete" button. A confirmation pop-up comes up.

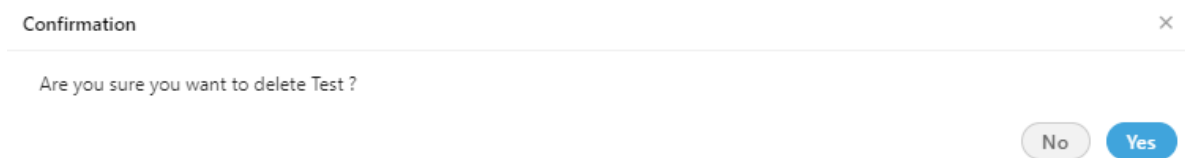


Figure: Delete Routing Policies

Click "Yes" if you want to delete the routing policy, else click "No".

10.2.9.1.3 Routing for Outbound

In "Outbound: Feature Context" section, perform the following steps.

1. Click "Add" to add a routing policy for the Outbound feature context.
2. It creates a new row in the blank area.

Outbound: Feature Context Delete Refresh Add

Policy Id	Policy Type	Name	Last Updated	Assignment
<input type="checkbox"/> 0	<ul style="list-style-type: none"> Basic Single Call Context Type Phone Based Call Context Type Multiple Type Round Robin Call Context... Basic Multiple Call Context Type 			Assign

Figure: Adding an Outbound Routing Policy

3. Select any of the following Policy Types.

- **Basic Single Call Context Type:** It is the policy type in which outbound calls will be dialed out from the single call context.
- **Phone Based Call Context Type:** It is the policy type in which Voice-Admin can define the pattern on basis of which numbers will be dialed out from multiple call context. It will only reflect after procuring appropriate licenses.
- **Basic Multiple Call Context Type (Licensable):** It is the policy type in which outbound calls will be dialed out from multiple call context. It will only reflect after procuring appropriate licenses.
- **Multiple Type Round Robin Call Context Type:** It is the policy in which if a call tried by a call context fails to get connected, then it will be tried by the different call contexts that are selected for calling as per Round-Robin algorithm. As per Round-Robin Algorithm, each call context is used to call for a fixed amount of time and if the call does not get connected in that duration, another call context is used. The left over call context is reused when all other call contexts in the loop are used and the call is still not connected.

Make sure to not provide a name for the Routing for any "Outbound: Feature Context". The name will be assigned automatically after selecting the call contexts. The Outbound Routing with manual names will not work.

4. Click "Assign" link under "Assignment" header to select a call context that you have assigned in this campaign in "Call Context" Tab. Following pop-up is displayed for "Basic Single Call Context Type" on the page.

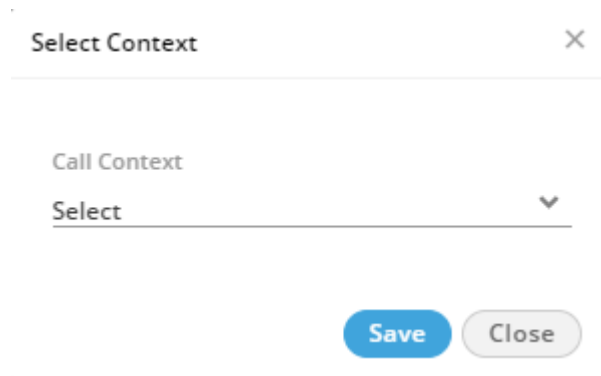


Figure: Select Call Context for Basic Policy

For "Phone Based Call Type", "Basic Multiple Call Context Type", and "Multiple Type Round Robin Call Context Type", the following pop-up appears to select the multiple call contexts.

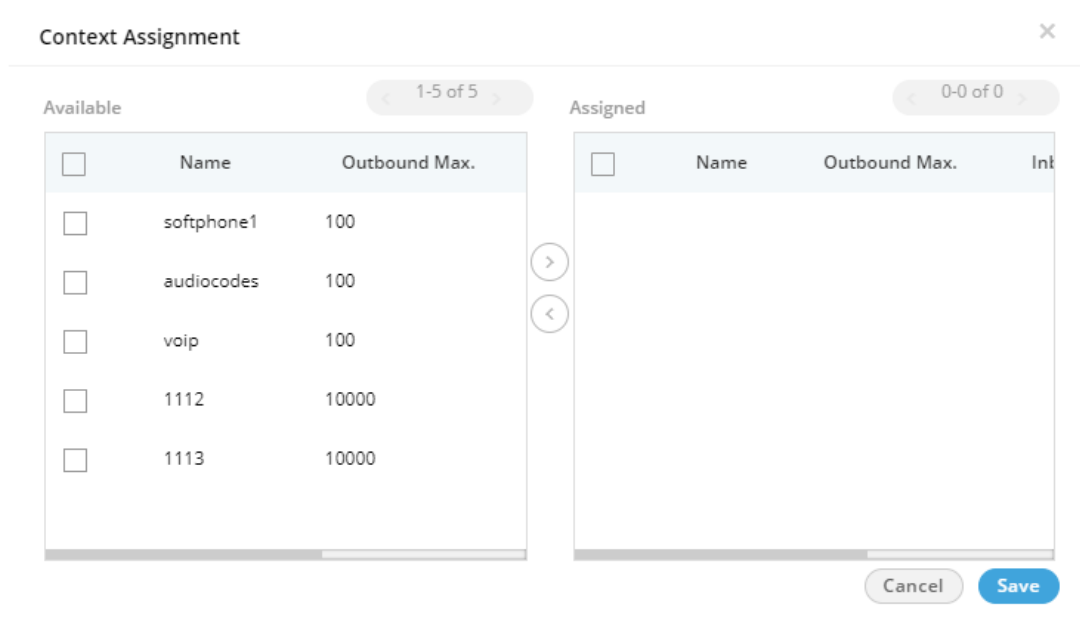



Figure: Select Call Contexts for Multiple Type Policy

Perform the following steps to assign call contexts to this new policy.

3.

A. Select the call contexts in "Available" section

B. Click  icon to proceed to assign the selected call contexts.

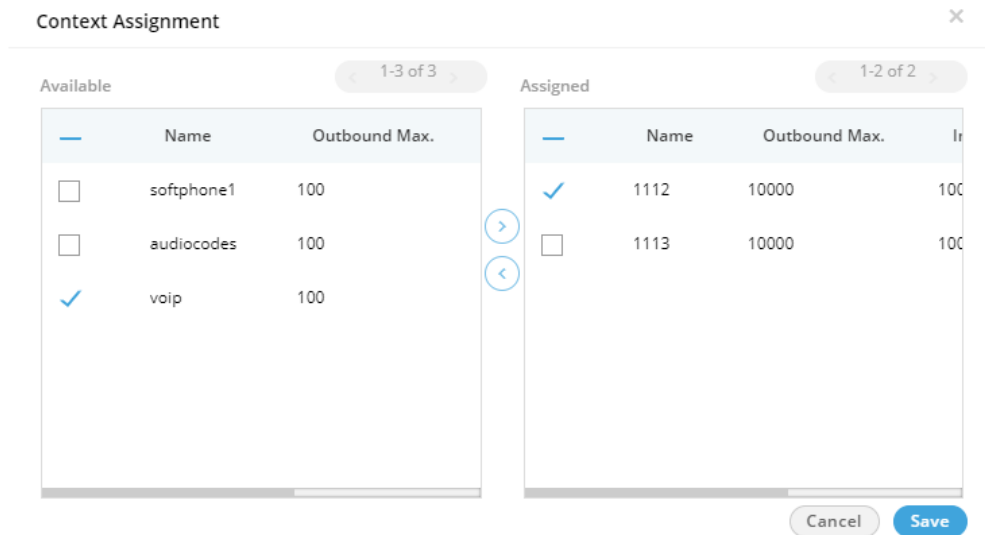



Figure: Assign or Unassign Call Contexts

C. Click "Save" to assign the call contexts to this campaign.

Rather, you can click "Cancel" to not assign the Call Contexts.

To unassign a call context, click the link under "Assign" header for a new or existing Outbound Routing Policy, select a call context in "Assigned Call Contexts" section, click  icon, and click "Save" to unassign the selected call context from the campaign.

4. Click "Save" to proceed to add the selected context to the routing policy.

5. Click "Apply" to create the Routing Plan for Outbound.

You can create multiple routing policies for the Outbound Feature in the Interactive Voice Application (Inbound) Campaign.

Outbound: Feature Context Delete Refresh Add

Policy Id	Policy Type	Name	Last Updated	Assignment
<input checked="" type="checkbox"/> 3	Basic Single Call Context Type	1113_basic.single.call.context.type	10/10/2018, 16:55:15	1113
<input type="checkbox"/> 15	Multiple Type Round Robin Call Cont	1112_basic.multiple.call.context.type	15/10/2018, 13:25:44	1112, softphone1

Figure: Added Outbound Routing Policies

You can only change the selected Call Contexts while modifying an Outbound Routing Policy. In addition to that, you can also delete a routing policy.

10.2.9.1.4 Delete Routing Policy

Select the Routing Policy for which you want to delete permanently. Click "Delete" button. A confirmation pop-up comes up.

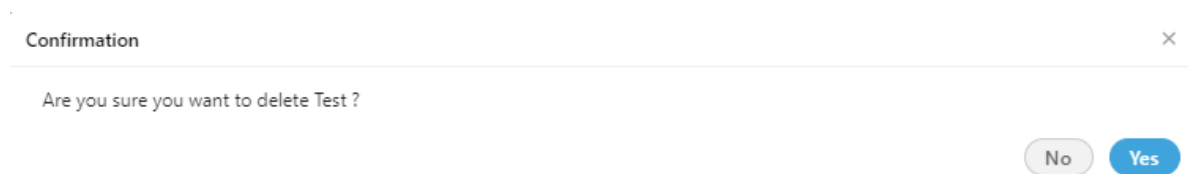


Figure: Delete Routing Policies

Click "Yes" if you want to delete the routing policy, else click "No".

10.2.9.2 Saving Routing Test Result

When a voice admin creates a routing test case, they may want to check that test case frequently so that any issues in the routing can be figured out easily. Allowing the voice admin to save these test results saves an enormous amount of time for them. On the Routing Test screen, the voice admin can save the test cases. The saved test cases are listed on the same screen.

The screenshot shows the "Routing Test (3)" interface. At the top, there are navigation tabs: System, User, Process, Reports, Control Panel, More, and Synthesizer. Below the tabs is a search bar and two buttons: "Add" and "Run Test". The main area contains a table with the following columns: Test Name, Call Context, Destination, Source, Routed, Profile, Profile Type, Campaign, Nodeflow, and Action. There are three rows of test results, each with a checkbox on the left and an action icon on the right.

Test Name	Call Context	Destination	Source	Routed	Profile	Profile Type	Campaign	Nodeflow	Action
<input type="checkbox"/> HK HotlineHK Hotline_1	TATA_Sip	1234556	545555	✓	DefaultCallContext 98928	cc.call.context	Covid_19_HDFC_Delhi	NodeflowName_1233	ⓘ
<input type="checkbox"/> HK HotlineHK Hotline_1	TATA_Sip	1234556	545555	✗	DefaultCallContext 98928	cc.call.context	Covid_19_HDFC_Delhi	NodeflowName_1233	ⓘ
<input type="checkbox"/> HK HotlineHK Hotline_1	TATA_Sip	1234556	545555	⚠	DefaultCallContext 98928	cc.call.context	Covid_19_HDFC_Delhi	NodeflowName_1233	ⓘ View

Figure: Saving Routing Test Result

1. Voice Admin can also perform the following actions
2. Delete a test case or select multiple test cases and delete them

3. Search for a test case
4. Select the test case(s) they want to run
5. Edit a test case.

10.2.9.3 Types of Routing in a Campaign

10.2.9.3.1 Routing Types in Voice Campaign

The following are the routing types in a Voice Campaign.

1. Skill-based Routing
2. Queue-based Routing
3. Priority-based Routing

10.2.9.3.1.1 Skill-based Call Routing in a Voice Campaign

A skill-based routing in a voice campaign is based upon the skills of the agent assigned in that queue. It means that the calls will be first offered to the agents who have more skills as compared to others.

Business Use Case 1

Suppose a scenario in which there are two types of agents: some agents are experts in the Spanish language, whereas others are experts in the English language. Based upon their skill levels (ranges from 1-10), the administrator has provided the skill level to both types of agents. Now, a customer initiated a voice call and selected English as its preferred language for the conversation. The call for that customer will be handed over to the agent who has a higher skill level in the English language. The agents with a low skill level in English will get the call only if the agents of higher skill levels are busy.

Similarly, if a customer initiated a voice call with preferred language Spanish, then the agent with high Spanish skill will get the call first.

Business Use Case 2

There can be one more case in addition to the above scenario. Suppose one agent is assigned with both skills; that is, English and Spanish, but the skill level of Spanish is higher than English. In that case, the agent will get the Spanish calls first until either all Spanish

calls have been answered (that is, there is no pending Spanish call left), or the SLA for the English calls does not breach.

10.2.9.3.1.2 Queue-based Routing for Voice Calls

A Queue-based routing in a voice campaign is based upon the priority given to the queues. It means whenever a call arrives; the system offers it to that queue, which has more priority over others.

Business Use Case

Suppose a scenario in which there are two queues: the first queue contains agents with more knowledge or experience, and the second queue has agents with less knowledge or experience. In this case, the priority for the first queue is more than the priority of the second queue. It means that whenever a call arrives in the system, the system tries to connect it with the agents assigned in the first queue. Only if the agents of the first queue are busy or not available, then the calls will be given to the agents available in the second queue.

10.2.9.3.1.3 Priority-based Routing for Voice Calls

A Priority-based routing in a voice call campaign is based upon the priority given to the calls initiated by the customers. It means that the calls which are more important for the business gets priority and answered first than to the calls with less priority.

Simple Business Use Case

Suppose a use case where the organization gets two types of calls: the first type of calls are sales driven that originates revenue to the company, and the second type of calls are of support. The priority for the sales calls is more than the priority of the support calls. Suppose a customer initiated a voice call of sales type, and at the same time, another call for support is also initiated by another customer. In this case, the sales call will be given priority over the support call. It means that the agent gets the sales call first, and after that, the support call will be offered to the agent.

Complex Business Use Case

Suppose a scenario where the business has two languages to serve the customers; for example, English and Hindi languages. All agents are either knowing both languages already or supposed to deal in both languages. In this case, there are three different business calls, which are sales, renewal, and care calls. The priority of these calls is that Sales calls have Priority 1, renewal has Priority 2, and care has Priority 3. For this scenario, the following solution can be possible.

Solution: Assign the skill levels of English and Hindi to all agents. Create queues for all the business calls as per the languages.

- sales_for_english
- sales_for_hindi
- renewal_for_english
- renewal_for_hindi
- care_for_english
- care_for_hindi

Assign the priority of the business calls in the selected nodeflow; that is, sales calls have Priority 1, renewal calls have Priority 2, and care calls have Priority 3.

Either all agents can be assigned in all of these queues, or the agents can be distributed in these queues as per requirement. Now, when a customer calls, then based upon the business type, the call will be distributed between the different queues and agents. The call with a high priority will be given more preference over the calls with less priority.

As per this solution, the calls with less priority have to wait for more than expected, and chances of call drop can be raised. To prevent this problem, we have to concentrate more on low priority calls also. Now, assign the SLA to all three types of calls, so that less priority call will be answered before its SLA is going to breach. For this, create a new queue named "OverFlow_Queue". Now, whenever a call of the low priority level is going to breach the SLA, it will be sent to the newly created "OverFlow_Queue", and thus all calls will be answered in this way.

10.2.9.3.2 Skill-based Call Routing in a Voice Campaign

Skill-based routing (SBR) is a component of automatic call distributor (ACD) systems that filters and directs incoming inquiries to call center agents with the most applicable skill sets.

Perform the following steps to route your call according to skills defined.

1. Add the skill category, skill levels, and assign the agents to the skills. [Know more...](#)

The screenshot shows the 'Skills Management' section of the Ameyo interface. It features a table with columns for Skill Name, Last Updated, Users Assigned, Skill Level, Skill In Queues, and Assign Users. There are also buttons for Delete, Refresh, Apply, and Add.

	Skill Name	Last Updated	Users Assigned	Skill Level	Skill In Queues	Assign Users
<input type="checkbox"/>	English	-	2	Beginner	-	Manage Users
<input type="checkbox"/>	Hindi	-	1	Beginner	-	Manage Users

Figure: Added Skills

2. Go to the Inbound campaign and switch the tab to the Queues. Create the Queues corresponding to the defined skills. Assign the created skill in the queue and click Apply. [Know more...](#)

The screenshot shows the 'List Of Queues' section of the Ameyo interface. It features a table with columns for Queue ID, Queue Name, No. Of Skills, No. Of Users, Creation Date, and Actions. There are also buttons for Delete and Add Queue.

	Queue ID	Queue Name	No. Of Skills	No. Of Users	Creation Date	Actions
<input type="checkbox"/>	6	HindiQueue	1	2	Tue Jul 09 18:33:55 GMT+05:30 2019	Edit
<input type="checkbox"/>	1	EnglishQueue	1	2	Wed Jul 03 17:17:42 GMT+05:30 2019	Edit
<input type="checkbox"/>	7	MarathiQueue	1	2	Tue Jul 09 18:34:14 GMT+05:30 2019	Edit

Figure: Assign Queues

3. Create the routing for the skills which you have created. Assign the ACD Node and the queues corresponding to the skills. [Know more...](#)

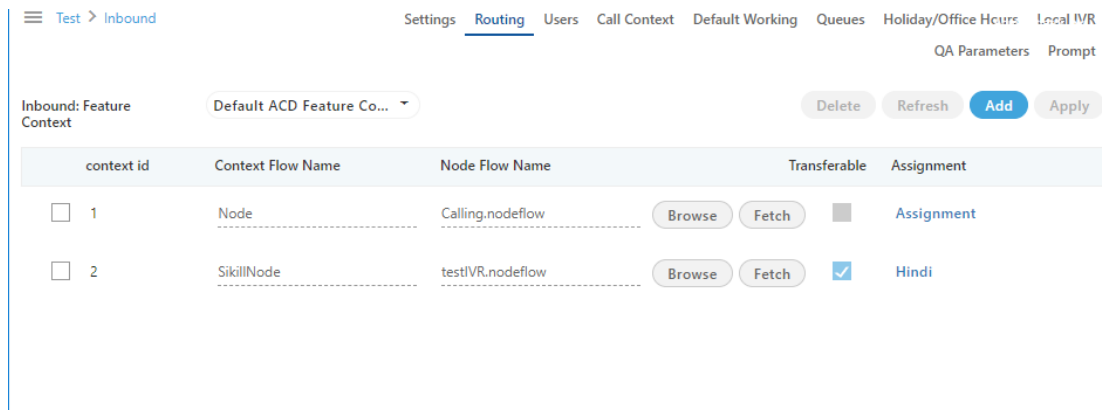


Figure: Assign Routing

Do not delete the old routing nodeflows created before, instead add the new one.

- Again switch the tab to the skills in System configuration menu and click "Skill in Queues" column and assign the queue to the corresponding skill levels.

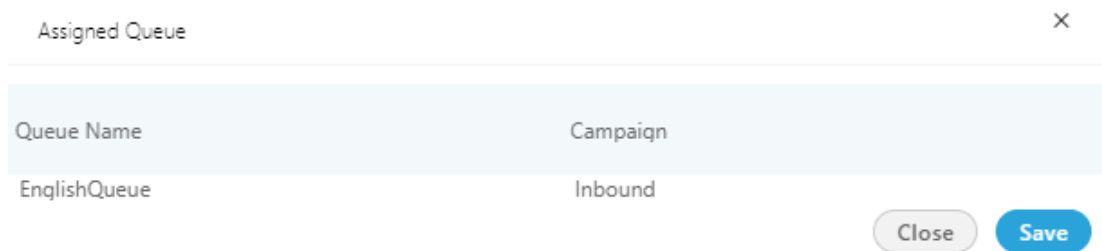


Figure: Assign the Queue

- Now, go to the inbound campaign and switch the tab to the "Prompt". Here, you have to add the prompt from which the customer has to select the skill level, so that the calls gets to route according to the defined skills. [Know more...](#)

Example:

In this test case, we are using three skills for routing, that is, English, Hindi, and Marathi. In the Voice Prompt, the English queue is assigned to number 1, Hindi queue is assigned to number 2, and Marathi queue is assigned to number 3.

Now, if the customer presses 1, then the call will be routed to the English queue, if customer presses 2 then the call will be routed to Hindi queue, and if the customer presses number 3 then the call will be routed to Marathi queue.

The agents with the higher skills will receive the call first and then the agents with lower skills get the calls only if the higher skilled agents are not free to take the call.

10.2.10 Agent Table Definition in Campaign Settings

The Agent Table Definitions created in a Process will be applicable and available, by default, in all campaigns of that Process. A new tab "Agent Table Definition" has been added in the settings of Inbound Campaign, and Outbound Campaign Campaign. You can select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition.

Agent Table Definition is not available for Voice Blast Campaign.

The screenshot shows the 'Agent Table Definition' tab in the Settings of an Interaction Campaign. The breadcrumb navigation is 'A.Manav > Chat_new'. The main navigation includes 'Settings', 'Chat Themes', 'Routing', 'Users', 'Default Working', 'Queues', and 'Holiday/Office Hours'. The sub-navigation shows 'General' and 'Agent Table Definition'. The left panel, titled 'Agent Table Definition (14)', contains a search bar and a table with the following data:

Agent Table Definitions	Description
<input type="checkbox"/>	DefaultAgentTableDefinition
<input type="checkbox"/>	two
<input type="checkbox"/>	three
<input type="checkbox"/>	Four
<input type="checkbox"/>	five
<input type="checkbox"/>	six
<input type="checkbox"/>	seven

The right panel displays the message: 'Please select an Agent Table Definition from the left to edit/view details.'

Figure: "Agent Table Definition" tab in the Settings of an Interaction Campaign

The Agent Table Definitions available in this Process are listed in the left section. You can select only one Agent Table Definition to view the options to assign the selected users to this Agent Table Definition in the right section.

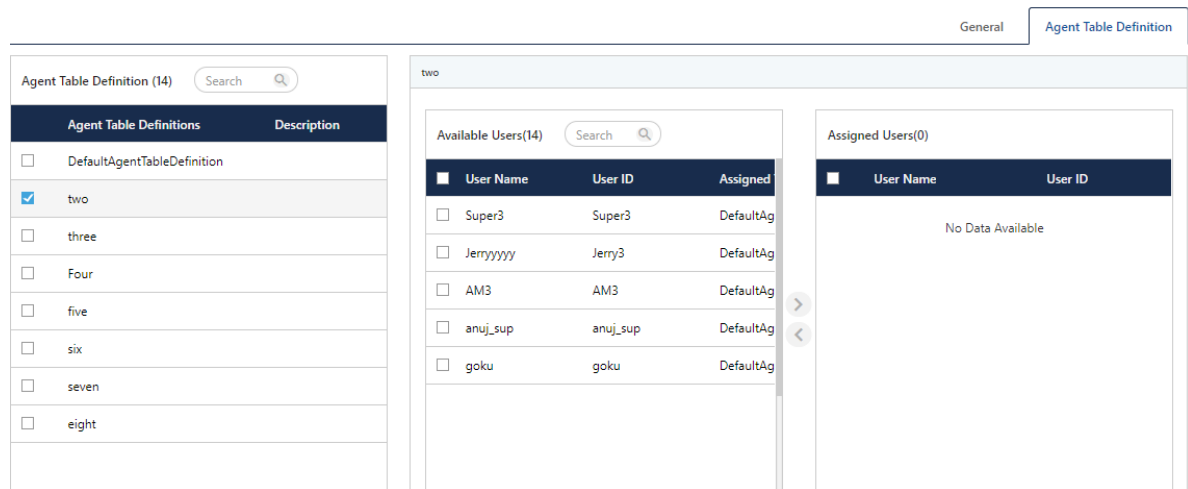




Figure: Assign or Unassign Users to Agent Table Definition

You can select the users in "Available Users" section and click  icon to select the users and move them to "Assigned Users" section.

To unassign users from the Agent Table Definition, select the users in "Assigned Users" section and click  icon to unassign the users.

Click "Save" to assign the users to the selected Agent Table Definition.

If the selected users are already assigned to the different Agent Table Definition, then the following warning message is displayed on the screen.



Figure: Warning Message

A user can be assigned to only one Agent Table Definition. If you want to reassign the users to this new Agent Table Definition, click "Reassign All" button. Else, click "Cancel" button.

If a new agent is assigned to a Campaign, then it will be assigned to the default Agent Table Definition of that campaign until the Voice-Admin modifies it manually.

10.3 Outbound Voice Campaign Settings

10.3.1 Outbound Voice Campaign Settings

In the left navigation bar of Process Tab, you can select an Outbound Voice Campaign to view its settings.

The changes made in settings of one Outbound Voice Campaign will be applicable to that campaign itself. They will not be applicable on other similar (outbound) and different (non-outbound) campaigns.

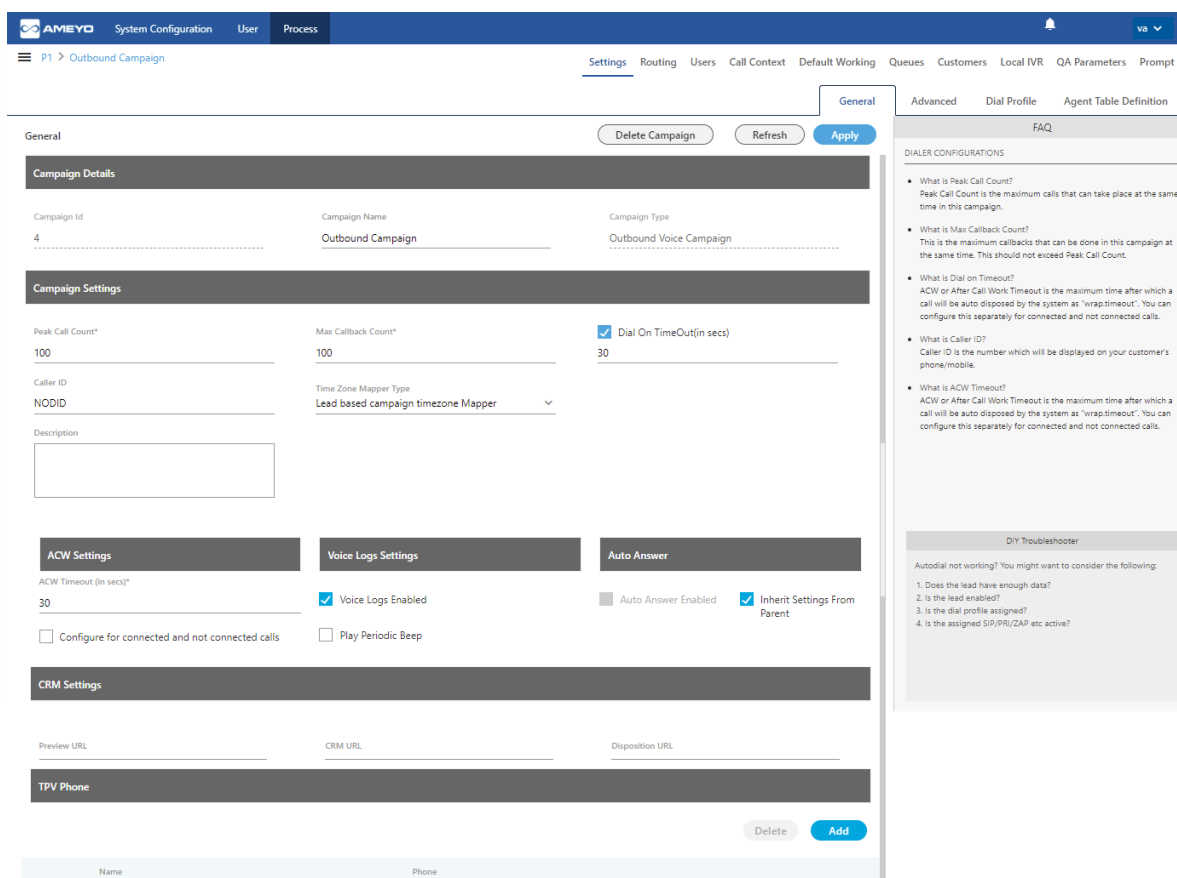


Figure: Settings of Outbound Voice Application Campaign

It contains the following tabs.

- Settings

- General Settings
- Advanced Settings
- Dial Profile Settings
- Queues
- Routing
- Users
- Default Working
- Holiday/Office Hours
- Call Context
- Customers
- Local IVR
- QA Parameters
- Prompt

10.3.1.1 Settings Tab

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

10.3.1.1.1 General Settings

Here, the General Settings are divided into the following sections.

- **Campaign Details:** These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.
- **Campaign Settings:** It contains the same settings, which you have configured while creating this campaign.

- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- **Auto Answer Settings:** Auto-Answer Feature is already available for WebRTC with or without Ameyo SIP Agent Proxy. This feature did not require the implementation of "Accept-Reject" node in the Nodeflow to show the prompt at Ameyo User Console before answering the call. However, "Accept-Reject Node" was providing the Auto-Answer Configuration at the campaign-level and this feature was missing in Auto-Answer Feature for WebRTC. "Auto-Answer" section contains the following options and only one option will work at a time.
 1. **Inherit from Parent:** Select this option to inherit the Auto-Answer Configuration in the campaign from the System-level. If the Auto-Answer is disabled at the System-level, then it will remain disabled at the Campaign-level. If the Auto-Answer is enabled at the System-level, then it will remain enabled at the Campaign-level.
 2. **Auto Answer Enabled:** It will enable "Auto-Answer" at the Campaign-level forcefully even if it is disabled at the system-level. Refer to the following screenshot.



Figure: Auto-Answer Enabled

- **(Licensable)TPV Phone:** As per the process requirement, there may be a few numbers to which transfer of calls is very frequent. Third-party

verification (TPV) number is used to transfer the call to verifier. Here, such frequently used TPV numbers are added so that the user can directly transfer the case to these numbers.



TPV Phone	
Name	Phone
<input type="checkbox"/> TPVPhone1	118263

Figure: TPV Phone

Click "Add" to show a row to add TPV Phone number. Enter the name and phone number. You can add multiple TPV Numbers. To delete a TPV phone number, click its checkbox to select it and click "Delete".

[Click here](#) to know more about the Campaign Details and CRM Settings for this campaign.

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

10.3.1.1.2 Advanced Settings

Here, the Voice-Admin can configure the Advanced Settings of an Outbound Voice Campaign.

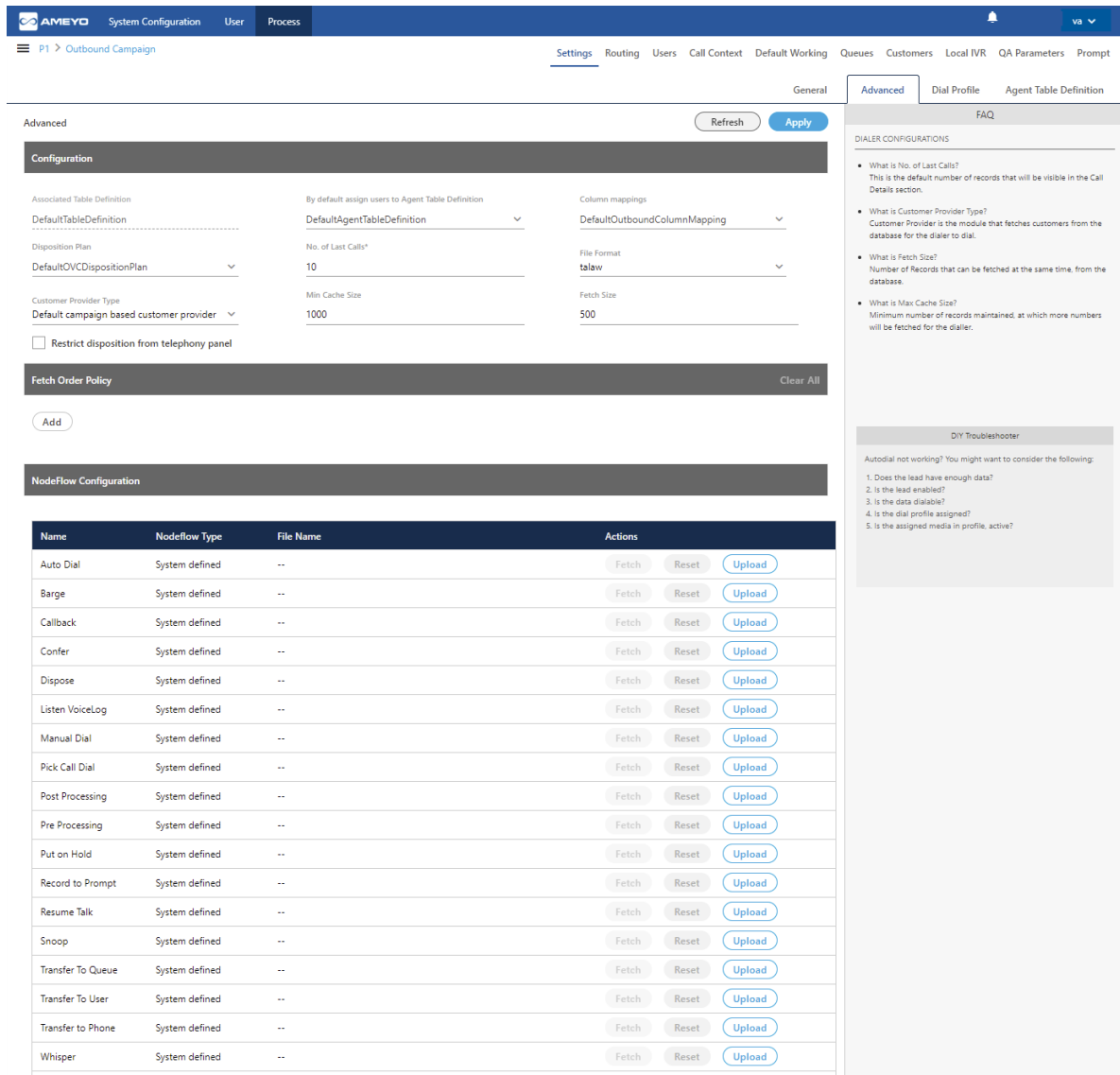


Figure: Advanced Settings

This tab can be divided into these sections - "Configuration", "Fetch Order Policy", and "NodeFlow Configuration".

- Configuration:** Except for the following, "Configuration" section contains those settings that you have already configured while creating this Outbound campaign. You can change the values for Column Mappings, Disposition Plan, Number of Last Calls, and File Format.

- **Customer Provider Type:** Select the algorithm for the dialer to pick and dial the customers from the database.

- Campaign Based Customer Provider (Licensable): It is the default customer provider, which will fetch maximum possible numbers from the highest priority leads in one query. If numbers fetched are less than the required numbers, then it will also fetch numbers from the lower priority leads. Cache will not be maintained on per lead basis. This provider will fallback to Lead Based Customer Provider in a Predictive Parallel Campaign.

This campaign feature setting is licensable. Contact Ameyo support team for further information on same.

- Lead Based Customer Provider (Licensable): It can be used to dial the numbers as per the lead priority. Customers with high priority will be dialed first, whereas customers with less priority will be dialed after it. If two leads have same priority numbers, then they will be selected for dialing as per their weights.

This campaign feature setting is licensable. Contact Ameyo support team for further information on same.

- Lead Based Customer Provider is the recommended for Parallel Predictive Dialer and Parallel Predictive Campaign.

- It is recommended to maintain cache per lead in case of lead to queue mapping in a Parallel Predictive Campaign so that all the queues get enough numbers, if available.

- This method is not recommended when lead leveling is not required.
 - If the large number of leads are enabled for a campaign and no lead leveling is required, then this method is not recommended. Else, the Campaign Based Customer Provider is recommended in such a scenario.
- PACE Based Customer Provider: It is the recommended method for a Parallel Predictive Campaign. Select it to enable the PACE.
- **Minimum Cache Size**: Provide the minimum size for the cache that is the count of numbers that can be stored a time.
- **Fetch Size**: Provide the count of numbers that can be fetched at a time.
- **Fetch Order Policy (Licensable)**: Here, you have to add and define "Fetch Order Policy" to fetch the customers' numbers. Select any of the following policies.
 - **Customer Upload Time**: The customers to be dialed are selected as per the time of the uploading of their numbers to the campaign. After selecting it, you can select ascending or descending order of the sorting the numbers.



Figure: "Customer Upload Time" Fetch Order Policy

In the ascending order, the customer whose number is uploaded very first will be dialed first and so on. In the descending order, the customer whose number is uploaded very last will be dialed first and so on.

- **Randomized order of lead upload:** The customers to be dialed are selected randomly from the lead. The random algorithm to sort the values in the database is used.
- **Natural Order of Lead Upload:** The customers to be dialed are selected as per the same order as they are originally presented in the CSV file, which was uploaded.
- **Number of Attempts:** The customers to be dialed are selected as per the number of attempts made to dial their numbers. After selecting it, the Voice-Admin can select the Ascending or Descending order.



Figure: "Number of Attempts" Fetch Order Policy

- **Customer Information:** The customers to be dialed are selected as per the ascending or descending order of the values of any customer information field. After selecting it, the Voice-Admin has to select the customer information field as per which the customers to be dialed has to be selected.

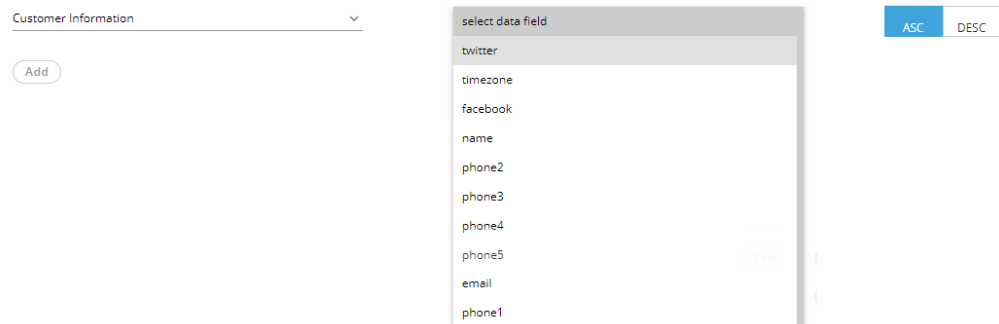


Figure: "Customer Information" Fetch Order Policy

After selecting the field, the Voice-Admin can opt for ascending or descending sorting.

- **CUSTOM :**Here, the Voice-Admin can provide its own customized JavaScript code to create a customized order of selecting the customers to be dialed. Multiple conditions can be mixed using this method.
- **User Disposition Retry Time:** The customers to be dialed are selected as per the retry time attached to their disposition. After selecting it, the Voice-Admin can select the Ascending or Descending order.



Figure: "User Disposition Retry Time" Fetch Order Policy

In Ascending order, those customers will be dialed first who has least disposition retry time. In descending order, those customers will be dialed first who has the highest disposition retry time.

- **NodeFlow Configuration**: It lets you upload the nodeflow for the different functions listed herein below.
 - Transfer to User
 - Manual Dial
 - Transfer to Phone
 - Confer
 - Dispose
 - Barge
 - Snoop
 - Put on Hold
 - Resume Talk
 - Transfer to Queue
 - Callback
 - Listen VoiceLog
 - Pick Call Dial
 - Record to Prompt
 - Post Processing
 - Whipser
 - Pre Processing
 - Auto Dial

10.3.1.1.3 [Dial Profile Settings](#)

Here, the Voice-Admin can create the dial profiles for this campaign using the Routing Plans. So, it is necessary to create the Routing Plans first before configuring this tab.

Before creating a routing plan, you have to assign and manage the users, assign the call contexts, and create the queues.

The screenshot displays the 'Dial Profile' configuration page. At the top, there is a navigation menu with 'Settings' selected, and sub-menus for 'Routing', 'Users', 'Call Context', 'Default Working', 'Queues', 'Customers', 'Local IVR', 'QA Parameters', and 'Prompt'. Below this, there are tabs for 'General', 'Advanced', 'Dial Profile', and 'Agent Table Definition'. The 'Dial Profile' tab is active, showing three sections: 'Manual Dial Profile Settings', 'Confer Dial Profile Settings', and 'Auto Dial Profile Settings'. Each section contains a 'Manual Dial Profile Policy' dropdown menu, a 'Call Context' dropdown menu, and a 'Ringling TimeOut(in secs)' input field with the value '30'. Below each section is a 'Set up TimeOut (in secs)' input field with the value '15'. At the bottom right of the page, there are 'Refresh' and 'Apply' buttons.

Figure: Dial Profile Settings

Perform the following steps to configure the Dial Profile Settings for Manual Dial, Confer Dial (Conference Dial), and Auto Dial.

1. **Manual Dial Profile Settings:** It lets you configure the settings for Manual Dial Profile. Perform the following steps.
 - A. "Manual Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".
 - B. **Ringling Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds

- C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds
2. **Confer Dial Profile Settings:** It lets you configure the settings for Confer Dial (Dial during Conference) Profile. Perform the following steps.
- A. "Confer Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".
 - B. **Ringling Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds
 - C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds
3. **Auto Dial Profile Settings:** It lets you configure the settings for Auto Dial Profile. Perform the following steps.
- A. "Auto Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".
 - B. **Ringling Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the

call. Provide a value in seconds for the same. The default value is 30 seconds

- C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

4. Click the "Apply" to apply the dial profile for any section.

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

When you click apply, the values for Call Context for the selected Policy is populated in the "Call Context" column.

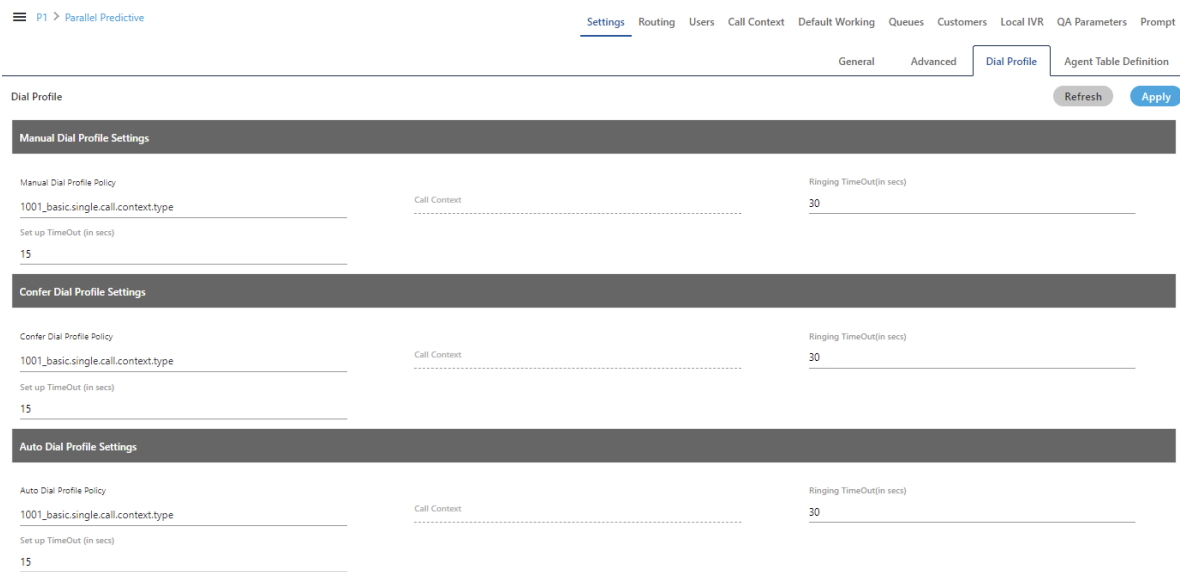


Figure: Configured Dial Profile Settings

10.3.1.2 Agent Table Definition

This tab allows you to select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition. [Know more...](#)

10.3.1.3 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the "Interactive Voice Application Campaign". [Know more...](#)

10.3.1.4 Queues

Here, you can create and manage the queues. [Know more...](#)

10.3.1.5 Default Working

Here, you can select the users who will be logged in to this campaign, by default, and will not receive the prompt to select the campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.3.1.6 Holiday/Office Hours

Here, you can define the holidays, office hours, and non-working hours for this campaign. This tab has already been explained in "System Configuration". [Know more...](#)

10.3.1.7 Call Context

Here, you can define the call contexts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.3.1.8 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.3.1.9 Local IVR

Here, you can create the Local IVRs for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.3.1.10 QA Parameters

Here, you can assign or unassign the QA Parameters to this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.3.1.11 Prompt

Here, you can create and manage the Voice Prompts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.3.1.12 Other Settings

Other Settings are explained in the following subsequent pages. Click the links to know more about them.

[Customers Tab](#)

10.3.2 Customers Tab for Filtration

10.3.2.1 Customers Tab in the Settings of an Outbound or Parallel Predictive Campaign

You can either use "Filter" or "Filter Groups" to filter the Customers while dialing in the campaign. If you activate "Filter Group", you cannot use "Filters".

Here, you can apply the Filter or Filter Groups on the Outbound or Parallel Predictive Dialing Campaign.

You can either apply Table Filter or Table Filter Groups in a Contact Center.

It contains the following tabs. Click the links to know more about them.


1. [Filter Tab](#)
2. [Filter Group Tab](#)

10.3.2.2 Filter Tab of Customers Tab in the Settings of an Outbound or Parallel Predictive Campaign

You can either use "Filter" or "Filter Groups" to filter the Customers while dialing in the campaign. If you activate "Filter Group", you cannot use "Filters".

It filter the numbers of customers to be dialed. This tab shows the filters, which the administrator has created for Outbound Campaign in "System Configuration" → "Table" → "Filters".

Outbound Campaign shows the filters created for Outbound campaigns, whereas Parallel Predictive Campaign shows the filters created for Parallel Predictive Campaigns. Similarly, Voice Blast Campaign shows the filters created for Voice Blast Campaigns.

Hover the mouse over  icon to view the information for the selected table filter.

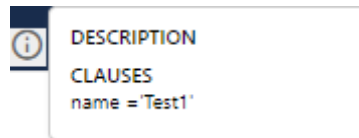


Figure: Filter Details

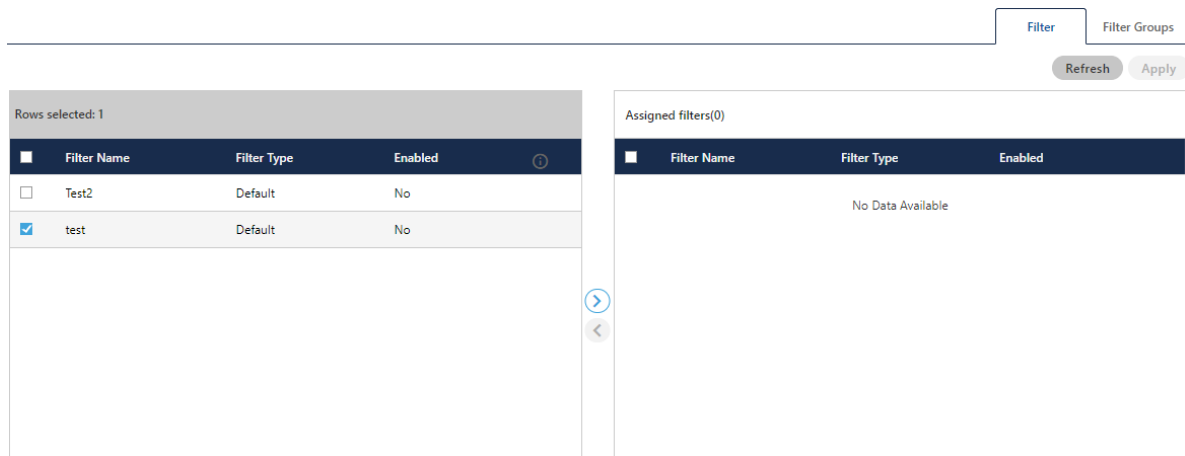



Figure: Customer Filter Settings

Perform the following steps to assign customer filters to this campaign.

1. Select the filters in "Available Filters" section
2. Click  icon to proceed to assign the selected filters.

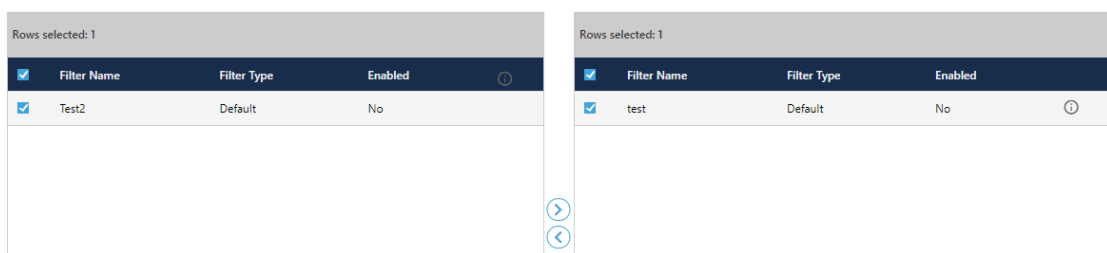



Figure: Assign or Unassign Customer Filters

3. Click "Apply" to assign the customer filters to this campaign.
Rather, you can click "Refresh" to not assign the filters.

To unassign a customer filter, select it in "Assigned Filters" section, click  icon, and click "Apply" to unassign the selected filter from the campaign.

10.3.2.3 Filter Group Tab of Customers Tab in the Settings of an Outbound or Parallel Predictive Campaign

You can either use "Filter" or "Filter Groups" to filter the Customers while dialing in the campaign. If you activate "Filter Group", you cannot use "Filters".

It allows you select a Filter Group to filter the numbers of customers to be dialed. This tab shows the filters, which you have created for Outbound Campaign in "System Configuration" → "Table" → "Filter Groups". [Know more...](#)

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

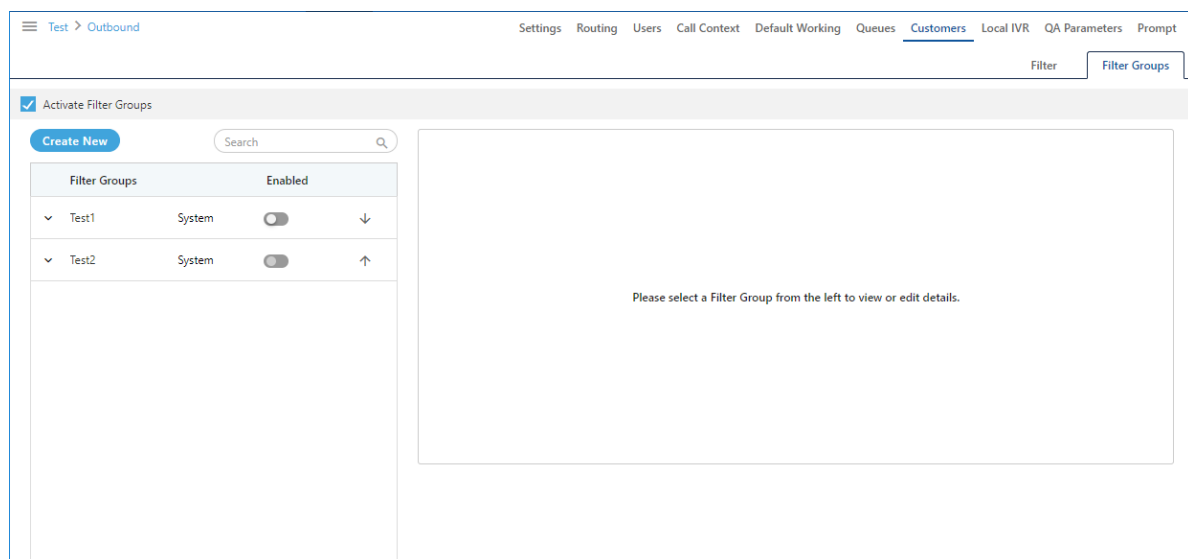


Figure: Customer Filter Groups

Here, you can perform the similar steps what you have performed in "Filter Groups" tab in "System" → "System Configuration" → "Table" → "Filter Groups". You can create a new Filter Group, view its details, modify it, and delete it. [Know more...](#)

10.3.2.3.1 Configure Number of Filter Groups to be applied on a Campaign

By default, the Voice-Admin can enable up to 10 Filter Groups on a campaign. However, this number is customizable. At the Linux-based machine running Ameyo AppServer, the Voice-Admin has to run the following commands.

Run the following command to enter the PostgreSQL Console as a PostgreSQL user and access the product database.

```
psql -U postgres <Product_Database>
```

Replace <Product_Database> with the name of your product database.

Run the following command to increase the limit of Filter Groups that can be applied to a Campaign.

```
insert into system_configuration_parameter
(name,type,value,default_value) values
('maximumAllowedEnabledTableFilterGroups','Integer','<Value_in_Number>','10');
```

Replace "<Value_in_Number>" with the number of Filter Groups to be applied on a campaign.

10.4 Voice Blast Campaign Settings

In the left navigation bar of Process Tab, you can select a Voice Blast Campaign to view its settings.

The changes made in settings of one Parallel Predictive Voice Campaign will be applicable to that campaign itself. They will not be applicable on other similar (voice blast) and different (non-voice blast) campaigns.

☰ P1 > Voice Blast

Settings Routing Users Call Context Holiday/Office Hours Customers Prompt

General Advanced Dial Profile

General

Delete Campaign Refresh Apply

Campaign Details

Campaign Id: 6 Campaign Name: Voice Blast Campaign Type: Voice Blast Campaign

Campaign Settings

Peak Call Count*: 100

Time Zone Mapper Type: Lead based campaign timezone Mapper

Caller ID: NODID

Description:

FAQ

DIALER CONFIGURATIONS

- What is Peak Call Count?
Peak Call Count is the maximum calls that can take place at the same time in this campaign.
- What is Max Callback Count?
This is the maximum callbacks that can be done in this campaign at the same time. This should not exceed Peak Call Count.
- What is Dial on Timeout?
ACW or After Call Work Timeout is the maximum time after which a call will be auto disposed by the system as "wrap.timeout". You can configure this separately for connected and not connected calls.
- What is Caller ID?
Caller ID is the number which will be displayed on your customer's phone/mobile.
- What is ACW Timeout?
ACW or After Call Work Timeout is the maximum time after which a call will be auto disposed by the system as "wrap.timeout". You can configure this separately for connected and not connected calls.

DIY Troubleshooter

Autodial not working? You might want to consider the following:

1. Does the lead have enough data?
2. Is the lead enabled?
3. Is the dial profile assigned?
4. Is the assigned SIP/PR/ZIP etc active?

Figure: Settings of Voice Blast Campaign

It contains the following tabs.

- Settings
 - General Settings
 - Advanced Settings
 - Dial Profile Settings
- Queues
- Routing
- Users
- Holiday/Office Hours
- Call Context
- Customers
- Prompt

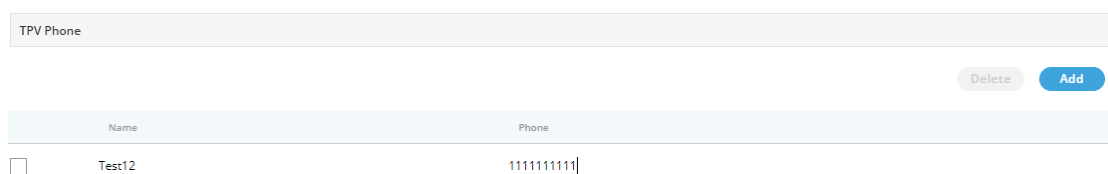
10.4.1 Settings of Voice Blast Campaign

This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

10.4.1.1 General Settings

Here, the General Settings are divided into the following sections.

- **Campaign Details:** These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.
- **Campaign Settings:** It contains the same settings, which you have configured while creating this campaign.
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- **TPV Phone:** As per the process requirement, there may be a few numbers to which transfer of calls is very frequent. Third-party verification (TPV) number is used to transfer the call to verifier. Here, such frequently used TPV numbers are added so that the user can directly transfer the case to these numbers.



TPV Phone		Delete	Add
Name	Phone		
<input type="checkbox"/>	Test12		1111111111

Figure: TPV Phone

Click "Add" to show a row to add TPV Phone number. Enter the name and phone number. You can add multiple TPV Numbers. To delete a TPV phone number, click its checkbox to select it and click "Delete".

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

[Click here](#) to know more about the Campaign Details and CRM Settings for this campaign.

After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

10.4.1.2 Advanced Settings

Here, the Voice-Admin can configure the Advanced Settings of a Voice Blast Campaign.

Settings Routing Users Call Context Holiday/Office Hours Customers Prompt

General **Advanced** Dial Profile

Refresh Apply

Configuration

Associated Table Definition
DefaultTableDefinition

Column mappings
DefaultBlastColumnMapping

No. of Last Calls*
10

File Format
talaw

Customer Provider Type
Default campaign based customer provider

Min Cache Size
1000

Fetch Size
500

Restrict disposition from telephony panel

Fetch Order Policy Clear All

Add

NodeFlow Configuration

Name	Nodeflow Type	File Name	Actions
Auto Dial	System defined	--	Fetch Reset Upload
Barge	System defined	--	Fetch Reset Upload
Callback	System defined	--	Fetch Reset Upload
Confer	System defined	--	Fetch Reset Upload
Dispose	System defined	--	Fetch Reset Upload
Listen VoiceLog	System defined	--	Fetch Reset Upload
Manual Dial	System defined	--	Fetch Reset Upload
Pick Call Dial	System defined	--	Fetch Reset Upload
Post Processing	System defined	--	Fetch Reset Upload
Pre Processing	System defined	--	Fetch Reset Upload
Put on Hold	System defined	--	Fetch Reset Upload
Record to Prompt	System defined	--	Fetch Reset Upload
Resume Talk	System defined	--	Fetch Reset Upload
Snoop	System defined	--	Fetch Reset Upload
Transfer To Queue	System defined	--	Fetch Reset Upload
Transfer To User	System defined	--	Fetch Reset Upload
Transfer to Phone	System defined	--	Fetch Reset Upload
Whisper	System defined	--	Fetch Reset Upload

FAQ

DIALER CONFIGURATIONS

- What is No. of Last Calls?
This is the default number of records that will be visible in the Call Details section.
- What is Customer Provider Type?
Customer Provider is the module that fetches customers from the database for the dialer to dial.
- What is Fetch Size?
Number of Records that can be fetched at the same time, from the database.
- What is Max Cache Size?
Minimum number of records maintained, at which more numbers will be fetched for the dialer.

DIY Troubleshooter

Autodial not working? You might want to consider the following:

1. Does the lead have enough data?
2. Is the lead enabled?
3. Is the data dialable?
4. Is the dial profile assigned?
5. Is the assigned media in profile, active?

Figure: Advanced Settings

This tab can be divided into these sections - "Configuration", "Fetch Order Policy", and "NodeFlow Configuration".

10.4.1.2.1 Configuration

Except for the following, "Configuration" section contains those settings that you have already configured while creating this Parallel Predictive campaign. You can change the values for Column Mappings, Disposition Plan, Number of Last Calls, and File Format.

- **Customer Provider Type:** Select the algorithm for the dialer to pick and dial the customers from the database.
 - **Campaign Based Customer Provider:** It is the default customer provider, which will fetch maximum possible numbers from the highest priority leads in one query. If numbers fetched are less than the required numbers, then it will also fetch numbers from the lower priority leads. Cache will not be maintained on per lead basis. This provider will fallback to Lead Based Customer Provider in a Predictive Parallel Campaign.
 - **Lead Based Customer Provider:** It can be used to dial the numbers as per the lead priority. Customers with the high priority will be dialed first, whereas customers with less priority will be dialed after it. If two leads have same priority numbers, then they will be selected for dialing as per their weights.
 - Lead Based Customer Provider is the recommended for Parallel Predictive Dialer and Parallel Predictive Campaign.
 - It is recommended to maintain cache per lead in case of lead to queue mapping in a Parallel Predictive Campaign so that all the queues get enough numbers, if available.
 - This method is not recommended when lead leveling is not required.
 - If large number of leads are enabled for a campaign and no lead leveling is required, then this method is not recommended. Else, the Campaign Based Customer Provider is recommended in such a scenario.

- PACE Based Customer Provider: It is the recommended method for a Parallel Predictive Campaign. Select it to enable the PACE.
- **Minimum Cache Size**: Provide the minimum size for the cache that is the count of numbers that can be stored a time.
- **Fetch Size**: Provide the count of numbers that can be fetched at a time.

10.4.1.2.2 Fetch Order Policy

Here, you have to add and define "Fetch Order Policy" to fetch the customers' numbers. Select any of the following policies.

- **Customer Upload Time**: The customers to be dialed are selected as per the time of the uploading of their numbers to the campaign. After selecting it, you can select ascending or descending order of the sorting the numbers.



Figure: "Customer Upload Time" Fetch Order Policy

In the ascending order, the customer whose number is uploaded very first will be dialed first and so on. In the descending order, the customer whose number is uploaded very last will be dialed first and so on.

- **Randomized order of lead upload**: The customers to be dialed are selected randomly from the lead. The random algorithm to sort the values in the database is used.

- **Natural Order of Lead Upload:** The customers to be dialed are selected as per the same order as they are originally presented in the CSV file, which was uploaded.
- **Number of Attempts:** The customers to be dialed are selected as per the number of attempts made to dial their numbers. After selecting it, the Voice-Admin can select the Ascending or Descending order.



Figure: "Number of Attempts" Fetch Order Policy

- **Customer Information:** The customers to be dialed are selected as per the ascending or descending order of the values of any customer information field. After selecting it, the Voice-Admin has to select the customer information field as per which the customers to be dialed has to be selected.

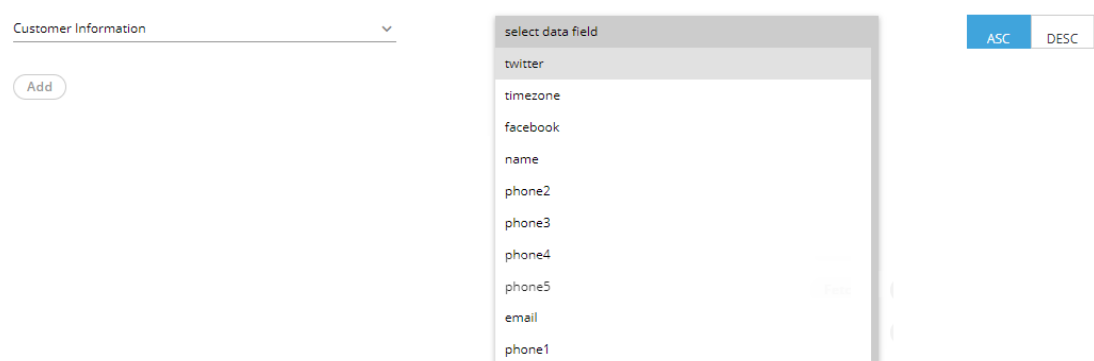


Figure: "Customer Information" Fetch Order Policy

After selecting the field, the Voice-Admin can opt for ascending or descending sorting.

- **CUSTOM** :Here, the Voice-Admin can provide its own customized JavaScript code to create a customized order of selecting the customers to be dialed. Multiple conditions can be mixed using this method.
- **User Disposition Retry Time:** The customers to be dialed are selected as per the retry time attached to their disposition. After selecting it, the Voice-Admin can select the Ascending or Descending order.



Figure: "User Disposition Retry Time" Fetch Order Policy

In Ascending order, those customers will be dialed first who has least disposition retry time. In descending order, those customers will be dialed first who has the highest disposition retry time.

10.4.1.2.3 [NodeFlow Configuration](#)

It lets you upload the nodeflow for the different functions listed herein below.

- Transfer to User
- Manual Dial
- Transfer to Phone
- Confer
- Dispose
- Barge
- Snoop

- Put on Hold
- Resume Talk
- Transfer to Queue
- Callback
- Listen VoiceLog
- Pick Call Dial
- Record to Prompt
- Post Processing
- Whipser
- Pre Processing
- Auto Dial

10.4.1.3 Dial Profile Settings

Here, the Voice-Admin can create the dial profiles for this campaign using the Routing Plans. So, it is necessary to create the Routing Plans first before configuring this tab.

Before creating a routing plan, you have to assign and manage the users, assign the call contexts, and create the queues.

The screenshot displays the 'Dial Profile' configuration page in the Ameyo Voice-Admin system. The page is divided into two main sections: 'Confer Dial Profile Settings' and 'Auto Dial Profile Settings'. Each section contains three input fields: 'Confer Dial Profile Policy' (with a 'Select' dropdown), 'Call Context' (with a dotted line input), and 'Ringling TimeOut(in secs)' (with a text input). The 'Auto Dial Profile Policy' section also has a 'Set up TimeOut (in secs)' field with a value of 15. The 'Ringling TimeOut(in secs)' field in both sections has a value of 30. At the top right, there are navigation tabs for 'Settings', 'Routing', 'Users', 'Call Context', 'Holiday/Office Hours', 'Customers', and 'Prompt'. Below these are sub-tabs for 'General', 'Advanced', and 'Dial Profile'. A 'Refresh' button and an 'Apply' button are located at the bottom right of the settings area.

Figure: Dial Profile Settings

Perform the following steps to configure the Dial Profile Settings for Confer Dial (Conference Dial) and Auto Dial.

1. **Confer Dial Profile Settings:** It lets you configure the settings for Confer Dial (Dial during Conference) Profile. Perform the following steps.
 - A. "Confer Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".
 - B. **Ringling Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds
 - C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

2. **Auto Dial Profile Settings:** It lets you configure the settings for Auto Dial Profile. Perform the following steps.
 - A. "Auto Dial Profile Policy" lists the Outbound Routing Policies that you have created in "Routing Tab" → "Outbound Feature Context".
 - B. **Ringling Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds
 - C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds
3. Click, "Apply" to apply the dial profile for any section.

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

When you click apply, the values for Call Context for the selected Policy is populated in the "Call Context" column.

The screenshot displays the 'Dial Profile' configuration page in the Ameyo Voice-Admin interface. The page is divided into two main sections: 'Confer Dial Profile Settings' and 'Auto Dial Profile Settings'. Each section contains a table with three columns: 'Confer Dial Profile Policy' (or 'Auto Dial Profile Policy'), 'Call Context', and 'Ringling TimeOut(in secs)'. The 'Call Context' column is populated with '1001_basic.single.call.context.type' for both sections. The 'Ringling TimeOut(in secs)' column is set to '30' for both sections. The 'Setup TimeOut (in secs)' is set to '15' for both sections. The page includes a navigation menu at the top with options like 'Settings', 'Routing', 'Users', 'Call Context', 'Holiday/Office Hours', 'Customers', and 'Prompt'. The 'Dial Profile' tab is selected, and there are 'Refresh' and 'Apply' buttons at the top right.

Confer Dial Profile Policy	Call Context	Ringling TimeOut(in secs)
1001_basic.single.call.context.type	1001_basic.single.call.context.type	30
Setup TimeOut (in secs)		
15		

Auto Dial Profile Policy	Call Context	Ringling TimeOut(in secs)
1001_basic.single.call.context.type	1001_basic.single.call.context.type	30
Setup TimeOut (in secs)		
15		

Figure: Configured Dial Profile Settings

10.4.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the "Interactive Voice Application Campaign". [Know more...](#)

10.4.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the "Interactive Voice Application Campaign". [Know more...](#)

10.4.4 Holiday/Office Hours

Here, you can define the holidays, office hours, and non-working hours for this campaign. This tab has already been explained in "System Configuration". [Know more...](#)

10.4.5 Call Context

Here, you can define the call contexts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.4.6 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.4.7 Prompt

Here, you can create and manage the Voice Prompts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.4.8 Customer Filter

Here, you can assign and unassign the customer filters in this campaign. This tab has already been explained in "Outbound Voice Campaign". [Know more...](#)

11. Delete a Campaign

Deleted campaign cannot be restored. The functionality like incoming call, outgoing call, interactions, or chat and its specific configuration will also be deleted. The users assigned to the campaign cannot attend any customer communication that you have configured in that campaign until they are assigned to a new campaign.

Perform the following steps to delete a campaign.

1. In the left navigation bar, select the campaign that you want to delete.
2. Click "Delete Campaign" button on top right corner to delete the campaign. It shows the following message.

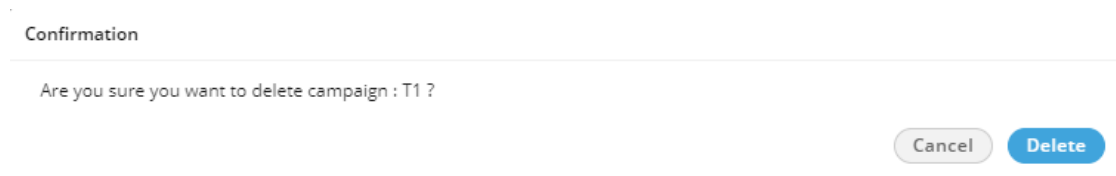


Figure: Deletion Confirmation Message

3. Click "Delete" to delete the campaign.

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

12. Voice-Admin Account Menu

To access the Voice-Admin Menu, click on the Voice-Admin name icon at the top-right of the screen.

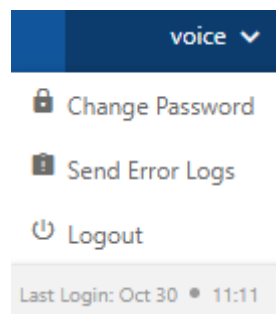


Figure:Voice-Admin Account Menu

The Voice-Admin can perform the following operations from the Menu tab:

1. **Change Password**: : This option allows the Voice-Admin to change the account's password. Click on the "**Change Password**" button and provide your current password, then type new password two times to validate it.

Figure:Change PasswordPop-up

2. **Send Error Logs:** It is a feature provided by the Ameyo to send the errors which occurred at the time of work. Click on the “**Send Error Logs**” button and the pop-up with the screenshot will arrive. Provide a description of that screenshot and enable “**Include Screenshot**” (optional) to attach the Screenshot with the error. After then click on the Send button to send that screenshot to the server. This will help the Voice-Admin to resolve the error.

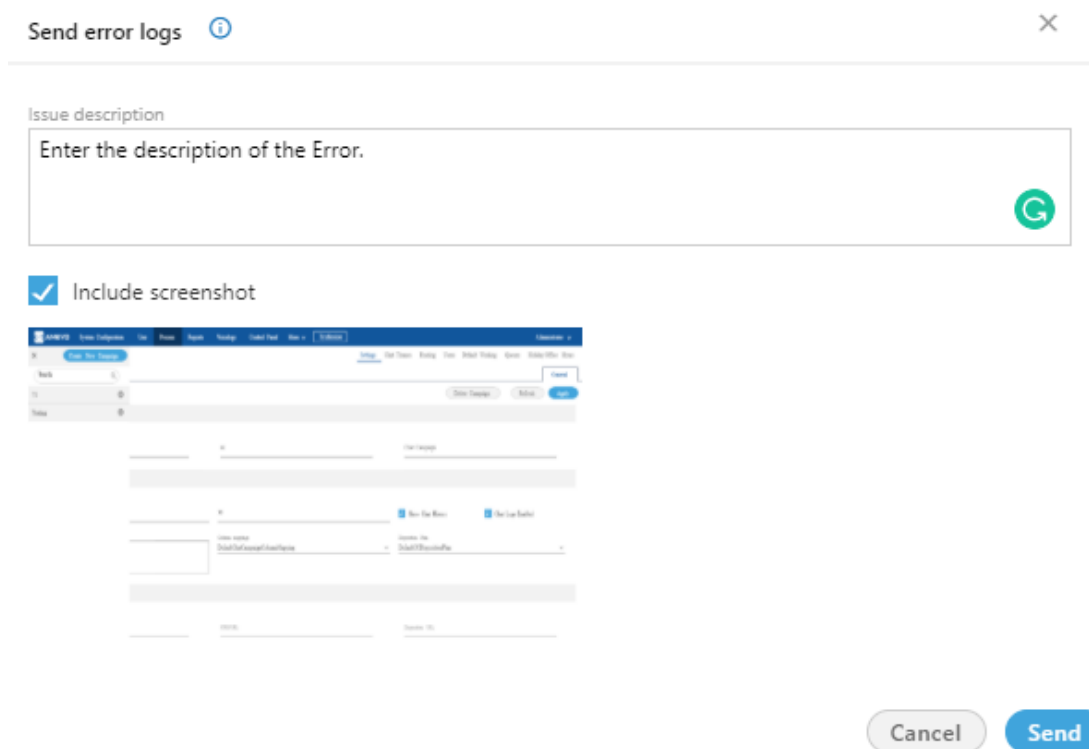


Figure:Send-Error-Logs

3. **Last Login:** It shows the last date and time of the Voice-Admin when the account has been logged in by Voice-Admin.

13. Voice-Admin Logout

Click the user account menu on top-right corner and click "Logout" to logout from the Voice-Admin Console.

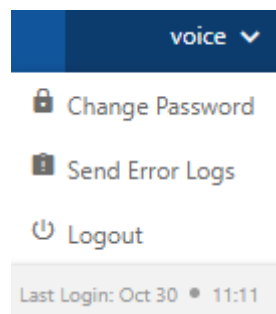


Figure: Logout