

Voice-Admin Manual of Ameyo 4.81

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1. Document Versioning

Version	Date	Purpose	Author
4.81.1-VAdM	14-August-2020	First Draft	Saurabh Goyal

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.

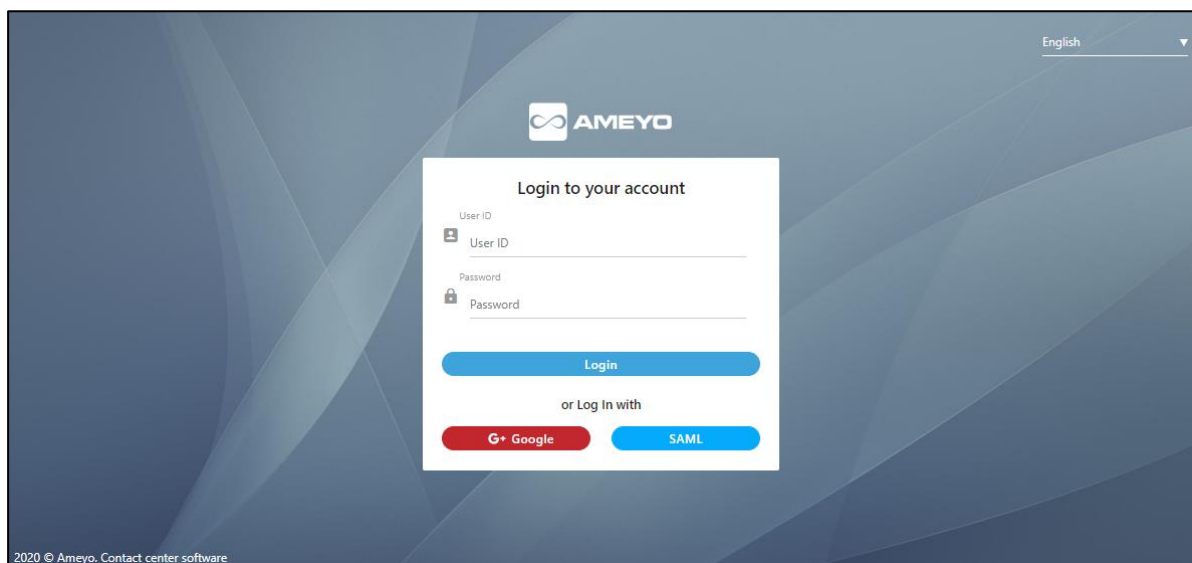


Figure: Login Screen

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.

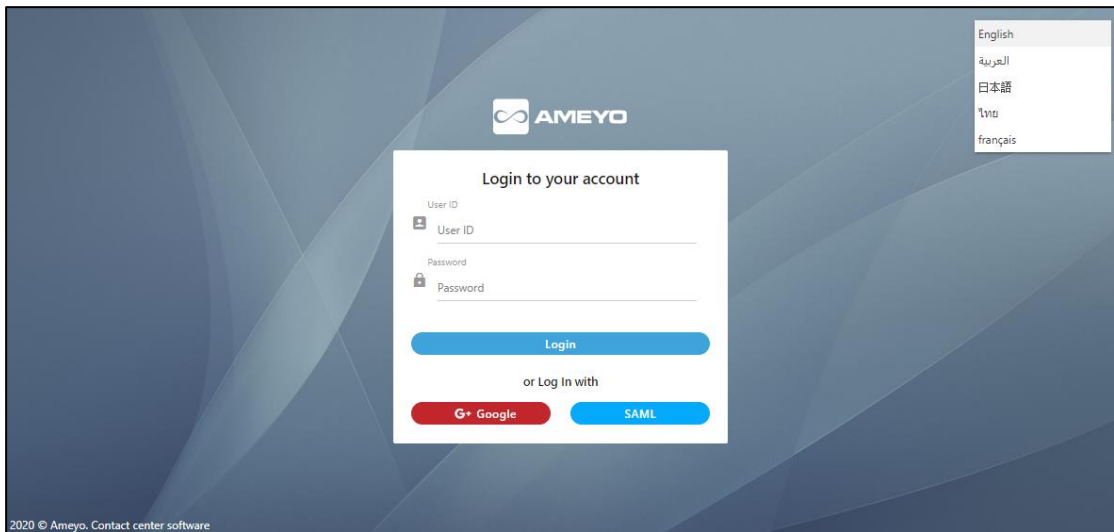


Figure: Change Language on Login Screen

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 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.

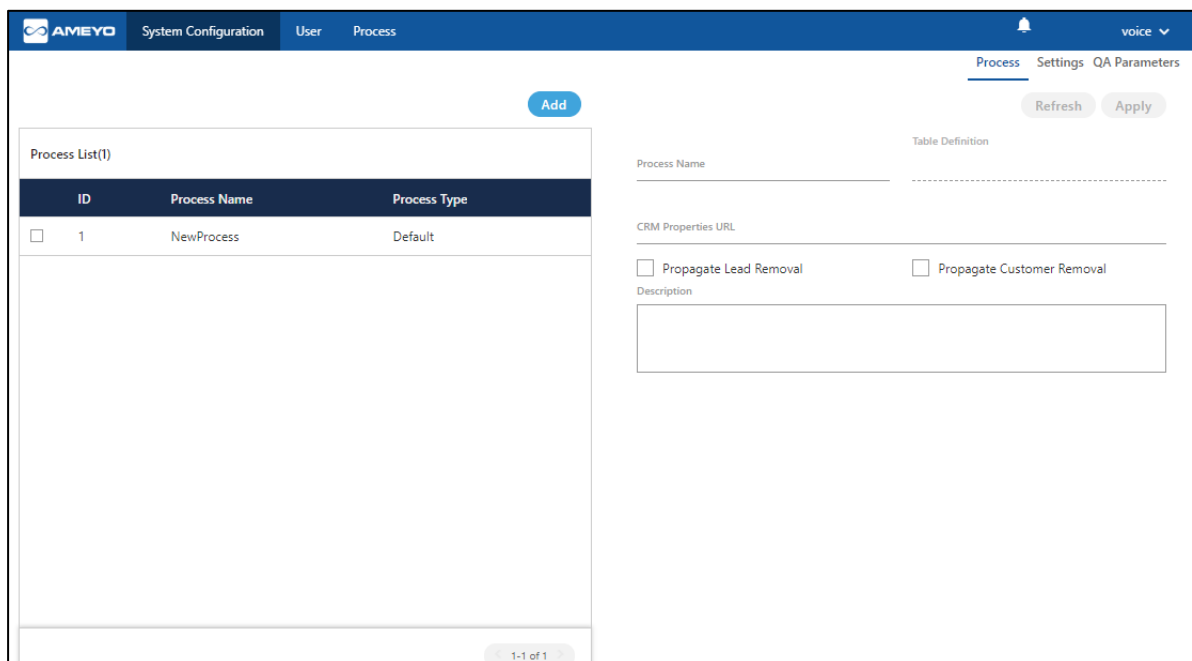


Figure: Ameyo Voice-Admin Workbench

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

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

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

4.1 Quick Startup Guide for Chat Campaign

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

- **Create Table Definition (Optional)**: 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.
- [Create Process](#)
- [Create Users \(Mandatory\)](#)
- [Configure Chat Themes \(Optional\)](#)
- [Create a Chat Campaign](#)
- [Manage Dispositions \(Optional\)](#)
- [Manage Holiday/Office Hours \(Optional\)](#)
- [Configure Chat Campaign Settings](#)

4.2 Quick Startup Guide for Interaction Campaign

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

- [Create Process](#)
- [Create Users \(Mandatory\)](#)
- [Configure Custom Fields \(Optional\)](#)
- [Configure Customer Cards \(Optional\)](#)
- [Create an Interaction Campaign](#)
- [Manage Dispositions \(Optional\)](#)
- [Manage Holiday/Office Hours \(Optional\)](#)
- [Configure Interaction Campaign Settings](#)

4.3 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 Exclusions at System Level \(Optional\)](#)
- [Manage Voicemail Prompts at System Level \(Optional\)](#)
- [Configure Interactive Voice Application Campaign Settings](#)

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

4.5 Quick Startup Guide for Parallel Predictive Voice Campaign

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

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

4.6 Quick Startup Guide for Voice Blast Campaign

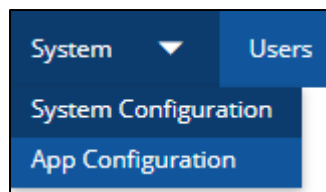
Go through the following pages one-by-one to create and manage a Voice Blast Campaign.

- **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

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.

5.1 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](#)

5.1.1 CRM Configuration

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

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

5.1.2 Process in System Configuration

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

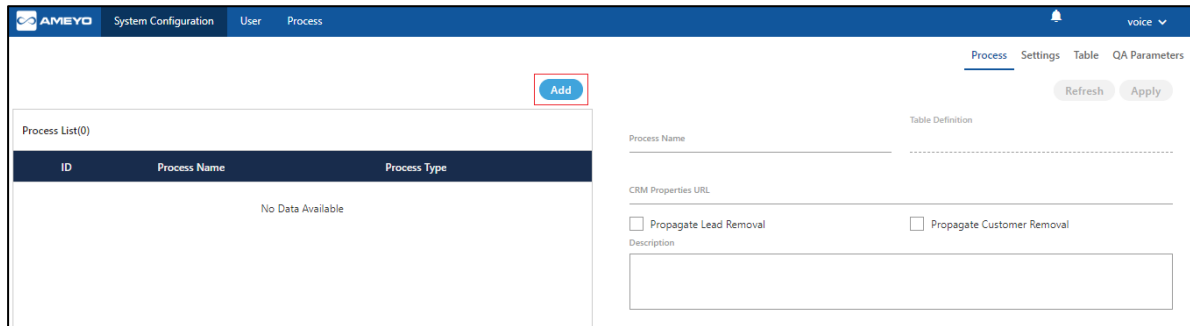


Figure: Process Tab

5.1.2.1 Create a Process

Perform the following steps to create a process.

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

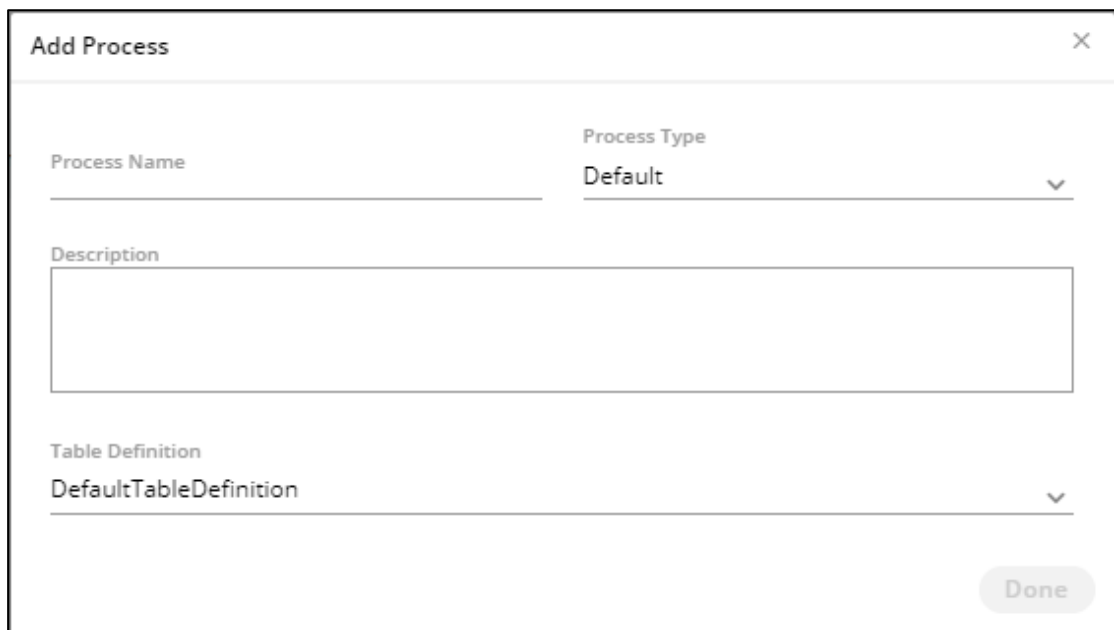


Figure: Create Process

2. Voice-Admin has to provide the inputs for the following fields.

- Process Name
- Description
- Process Type
- Table Definition

The screenshot shows a modal window titled "Add Process". It has a close button (X) in the top right corner. The form contains the following fields:

- Process Name:** A text input field containing "Testing".
- Process Type:** A dropdown menu with "Default" selected.
- Description:** A text area containing "Process to test the product".
- Table Definition:** A dropdown menu with "DefaultTableDefinition" selected.

A blue "Done" button is located at the bottom right of the modal.

Figure: Creating a Process

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

The screenshot shows the main application interface. On the left, there is a "Process List(1)" table with the following data:

ID	Process Name	Process Type
2	Testing	Default

At the bottom left, a green notification box says "Process was successfully created". On the right, there is a configuration panel for the selected process, including fields for "Process Name", "Table Definition", "CRM Properties URL", and checkboxes for "Propagate Lead Removal" and "Propagate Customer Removal".

Figure: Created a Process

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

5.1.2.2 Modify a Process

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

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

ID	Process Name	Process Type	
<input type="checkbox"/>	2	Testing	Default
<input checked="" type="checkbox"/>	3	Process	Default

Process Name	Table Definition
Process	DefaultTableDefinition
CRM Properties URL	
https://tw48.ameyo.com/CRM/crmprop	
<input type="checkbox"/> Propagate Lead Removal	<input type="checkbox"/> Propagate Customer Removal
Description	
Testing Process	

Figure: Modify a Process

2. You can change the Process Name here as well. Provide the new name of the process in the Process Name field.
3. You have to provide the inputs for the following fields.
 - A. **CRM Properties URL:** User can enter the the URL of the CRM that needs to be configured for a particular process. For example, the following URL can be added for a local AppServer.

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

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

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.

5.1.2.3 Delete a Process

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

1. Select the process that needs to be deleted.

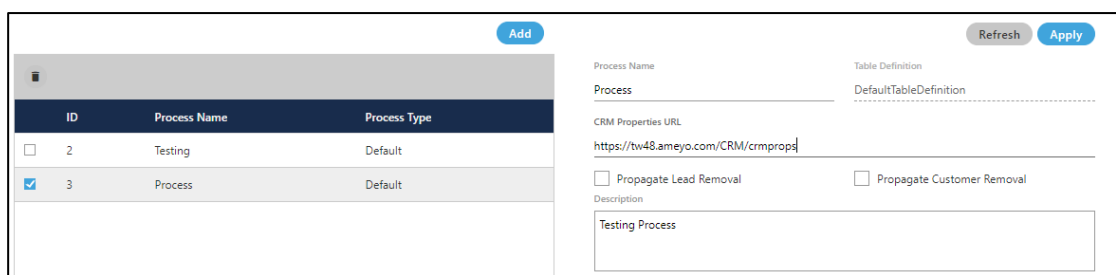


Figure: Delete Process

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.

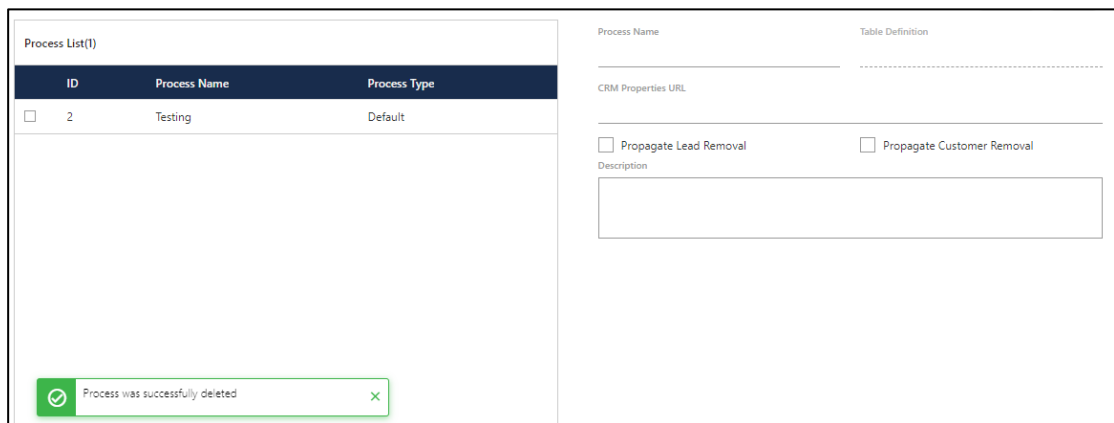


Figure: Deleted a Process

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

5.1.3 System Settings Tab

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

The screenshot displays the 'System Settings' tab within the Voice-Admin interface. The main heading is 'System Configuration'. At the top right, there are 'System Settings', 'Refresh', and 'Apply' buttons. The settings are organized into several sections:

- Knowledge Base Settings:** A text field for 'Knowledge Base URL' containing the default value `http://${serverName}:${serverPort}/`.
- After Login Behaviour:** Radio buttons for 'System' and 'User', with 'User' selected. Below it is an 'Auto Available' checkbox, which is currently unchecked.
- Auto Answer:** A checkbox for 'Enable Auto Answer', which is checked.
- Internal Chat:** A checkbox for 'Enable Internal Chat', which is checked.
- Break Reason Configuration:** A table with columns for 'Break Reason Option', 'Delete', 'Apply', and 'Add'. The table lists four options: 'Lunch', 'Snacks', 'Training', and 'Unavailable', each with an unchecked checkbox.
- CRM Integration:** A section for 'ZENDESK' with 'Unauthorized' and 'Active' status indicators, and a 'Server Side Dumping' checkbox which is checked.

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.



Figure: System Auto-Available Option

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



Figure: User Available Option

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

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

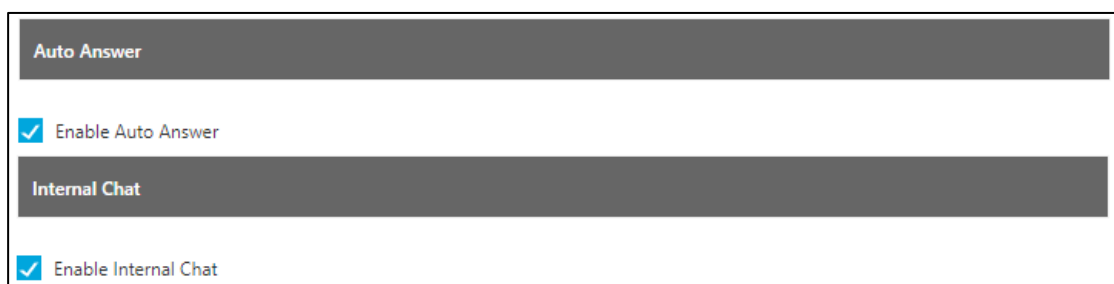


Figure: Auto-Answer and Internal Chat options

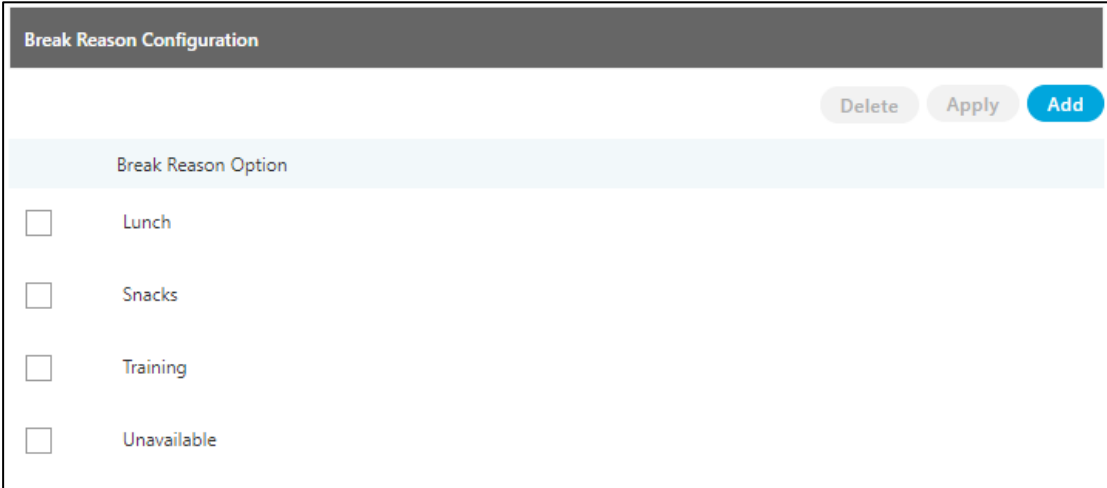
4. **(Licensable) Internal Chat :** The Voice-Admin can enable or disable the internal chat. After enabling it, the Supervisor, Agents, and other users can use the internal

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.

5. **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.
6. **(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	
Delete Apply Add	
Break Reason Option	
<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.

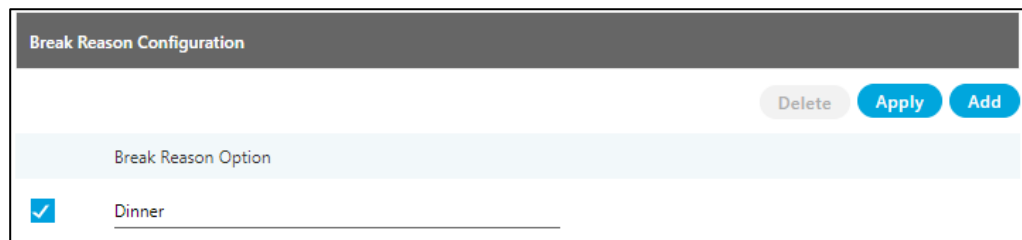


Figure: Add a Break Reason

- 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.

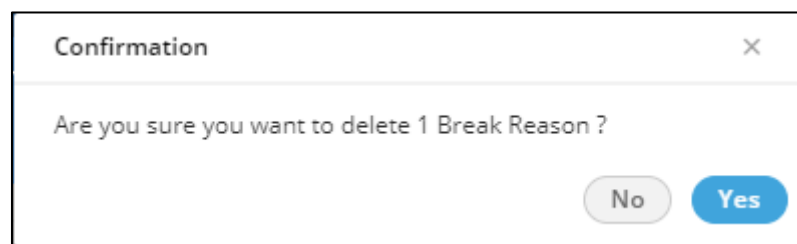


Figure: Asking to delete a Break Reason

- 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.

5.1.4 (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.

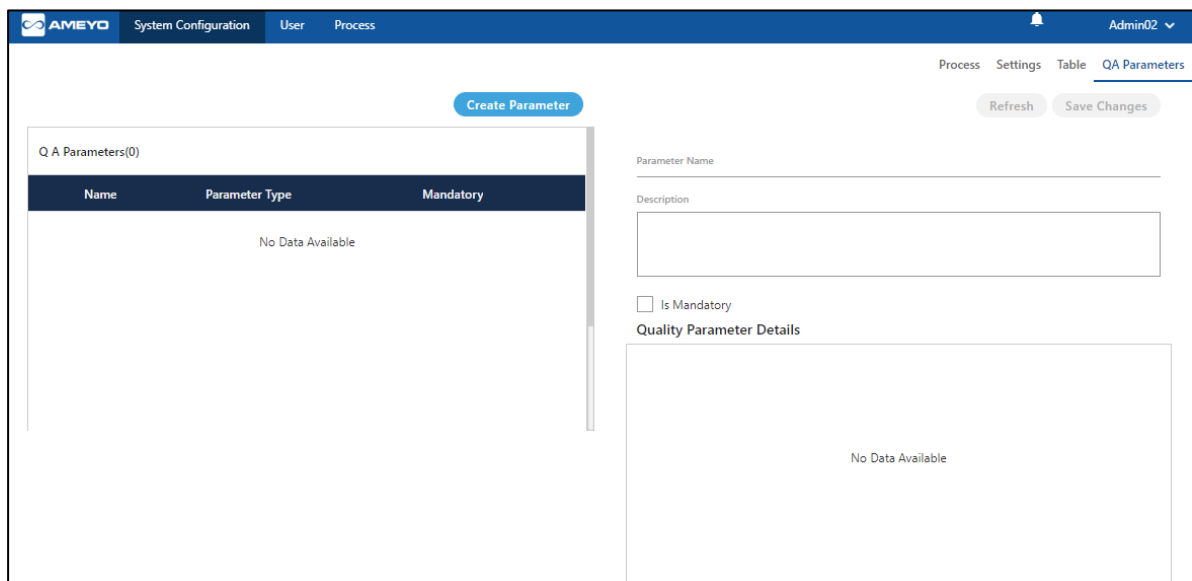


Figure: Quality Parameter Tab

5.1.4.1 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

Parameter Name: _____

Parameter Type: Boolean

Description: _____

Is Mandatory

Quality Parameter Details

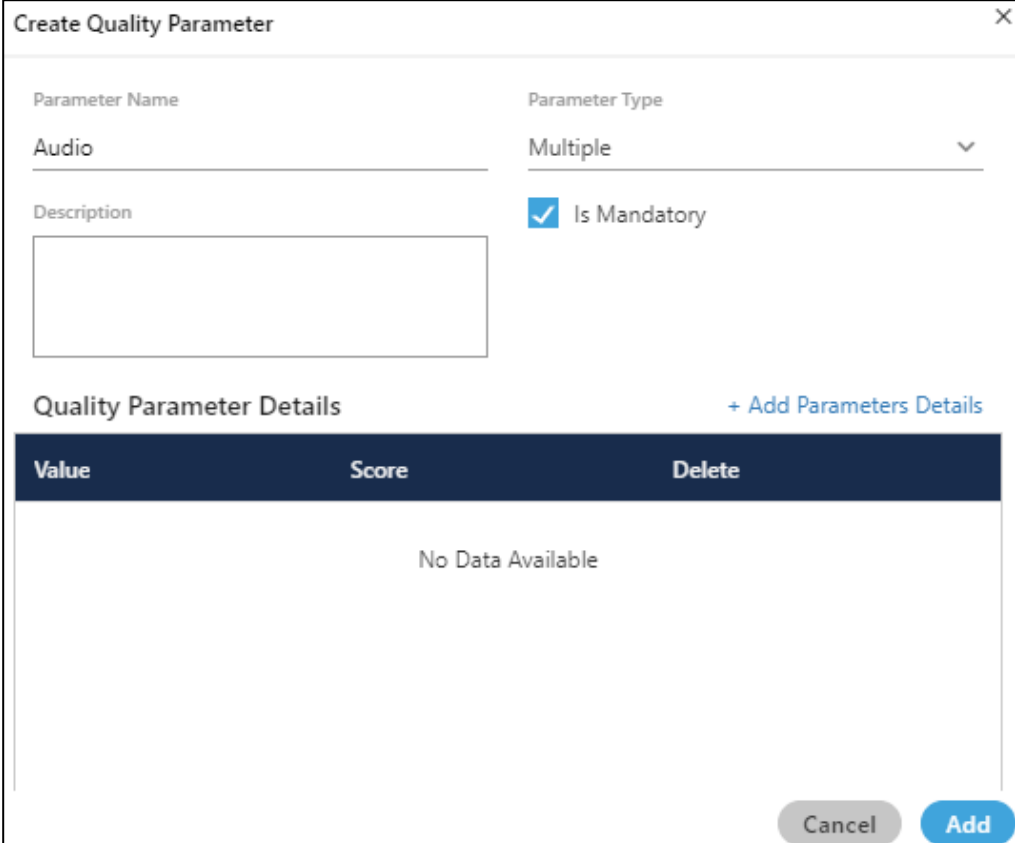
Value	Score
true	1
false	1

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.



The screenshot shows a 'Create Quality Parameter' dialog box. It has a title bar with a close button (X). The form contains the following fields:

- Parameter Name:** Audio
- Parameter Type:** Multiple (dropdown menu)
- Description:** (empty text area)
- Is Mandatory:**

Below the form is a section titled 'Quality Parameter Details' with a '+ Add Parameters Details' link. It contains a table with the following structure:

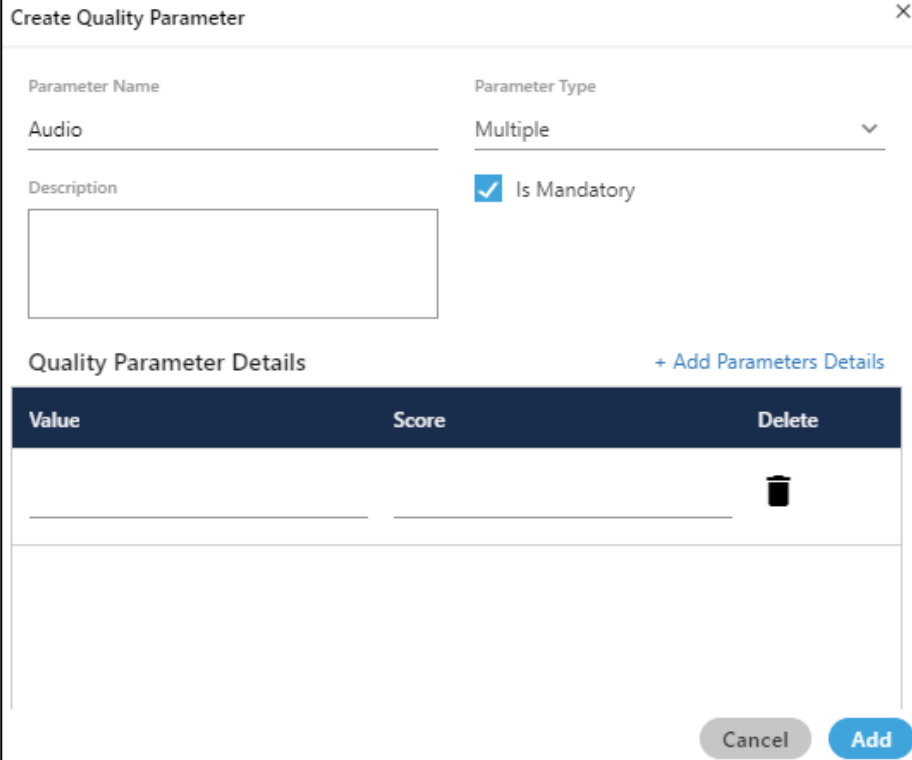
Value	Score	Delete
No Data Available		

At the bottom right of the dialog are 'Cancel' and 'Add' buttons.

Figure: Multiple-based Quality Parameter

Perform the following steps.

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




Parameter Name: Audio

Parameter Type: Multiple

Description:

Is Mandatory

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

Value	Score	Delete
		

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.

Parameter Name

Description

Parameter Type
Multiple

Is Mandatory

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

Value	Score	Delete
Good	5	
Poor	2	

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: Audio

Parameter Type: Comment

Description: Add comments here

Is Mandatory

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:

Is Mandatory

Quality Parameter Details

Value	Score
min	1
max	2

Figure: Range-based Quality Parameter

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

Following screenshot shows newly created quality parameters.

QA Parameters(4)

Name	Parameter Type	Mandatory
Multiple	Multiple	true
Boolean	Boolean	true
Comment	Comment	true
1Range	1Range	true

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.

5.1.4.2 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.

5.1.4.3 Modify Quality Parameter

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

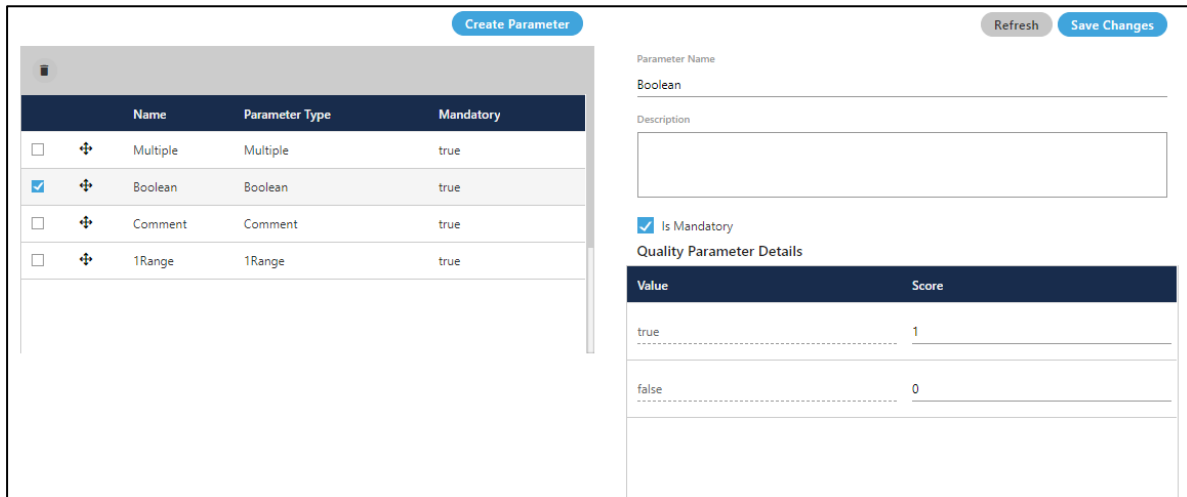


Figure: Modify QA Parameter

You can modify the following details.

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

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

5.1.4.4 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. Process Configuration

6.1 Process Tab

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

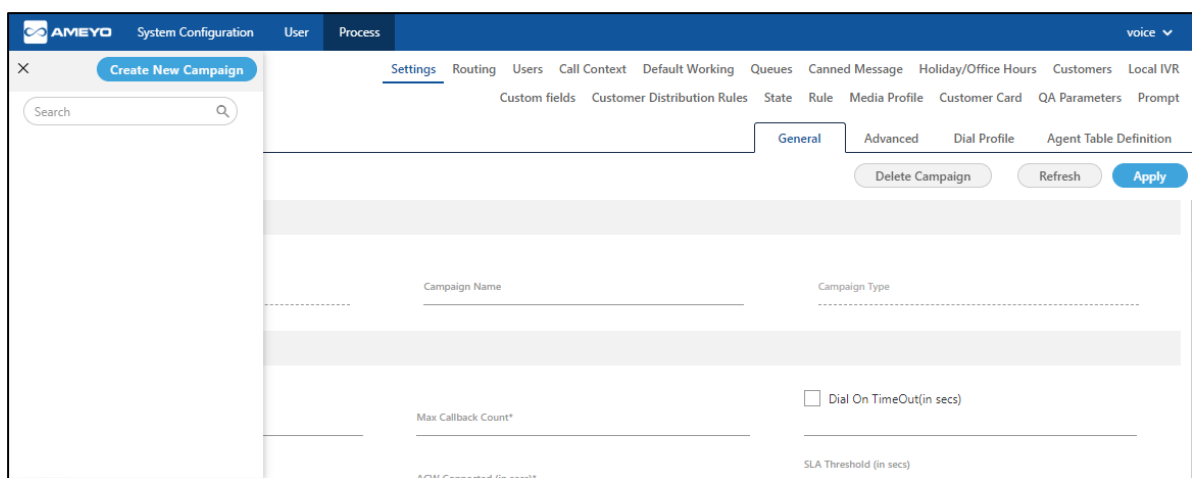



Figure: Process Tab

6.1.1 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.

6.1.2 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](#)

6.2 Process Settings

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

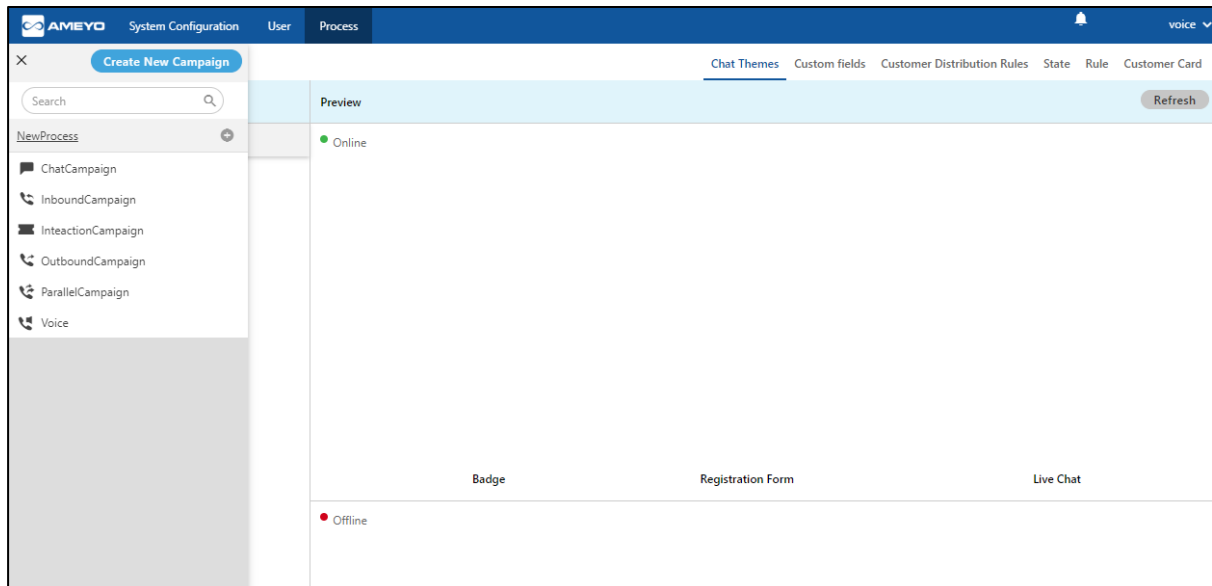


Figure: Process Settings

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

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

6.2.1 Chat Theme Tab in Process Settings

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

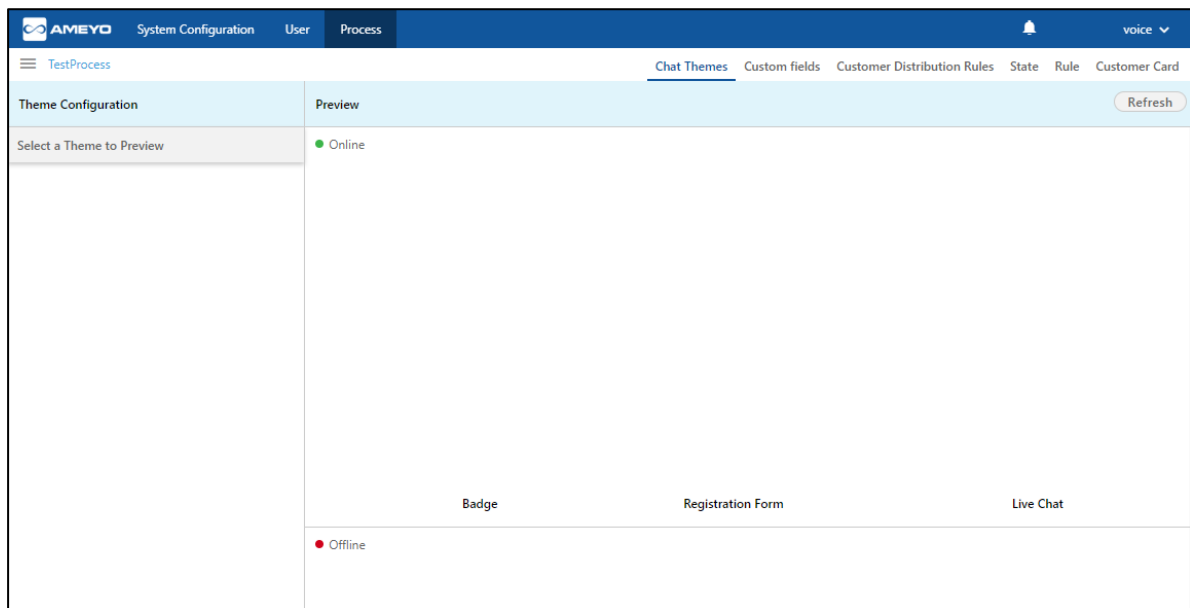


Figure: Chat Themes Tab

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

6.2.1.1 Parameters

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

Theme Configuration → Component → Property → Value

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

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

- COLOR: It lets you modify the color of the text in the success message.
It accepts the value in
RGBA(<number>,<number>,<number>,<number>).
- ERROR_MESSAGE: It lets you modify the formatting of the error message.
 - COLOR: It lets you modify the color of the text in the error message. It accepts the value in
RGBA(<number>,<number>,<number>,<number>).
- BACKGROUND: It lets you modify the background color in the form.
 - COLOR: It lets you modify the color of the background in the form. It accepts the value in
RGBA(<number>,<number>,<number>,<number>).
-
- DEFAULT_OFFLINE_REGISTRATION_FORM: It is the default offline registration form that appears when the chat is offline. It has the following components.
 - HEADER: It lets you modify the header in the form.
 - TEXT: It lets you modify the text in the header. It accepts the value in text format.
 - COLOR: It lets you modify the color of the header in the form. It accepts the value in
RGBA(<number>,<number>,<number>,<number>).

- TEXT_COLOR: It lets you modify the color of text in the header in the form. It accepts the value in

RGBA(<number>,<number>,<number>,<number>).
- INPUT_FIELD: It lets you modify the formatting of the input field in the form.
 - TEXT_COLOR: It lets you modify the color of the text in the Input Field in the form. It accepts the value in

RGBA(<number>,<number>,<number>,<number>).
- BUTTON: It lets you modify the formatting of the button in the form.
 - COLOR: It lets you modify the color of the button in the form. It accepts the value in

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

RGBA(<number>,<number>,<number>,<number>).
 - SHAPE: It lets you modify the shape of the button. It accepts the value as cornered or rounded.
- SUCCESS_MESSAGE: It lets you modify the formatting of the success message.
 - COLOR: It lets you modify the color of the text in the success message. It accepts the value in

RGBA(<number>,<number>,<number>,<number>).
- ERROR_MESSAGE: It lets you modify the error message.

- COLOR: It lets you modify the color of the text in the error message. It accepts the value in
RGBA(<number>,<number>,<number>,<number>).
- BACKGROUND: It lets you modify the background in the form.
 - COLOR: It lets you modify the color of the background in the form. It accepts the value in
RGBA(<number>,<number>,<number>,<number>).
- PLACEHOLDER: It lets you modify the text that is displayed over the input field as an introduction to the offline registration form.
 - TEXT: It lets you modify the placeholder text in the form. It accepts the value in plain text.
 - TEXT_COLOR: It lets you modify the color of the placeholder text in the form. It accepts the value in
RGBA(<number>,<number>,<number>,<number>).
-
- CHAT_SCREEN: It is the main chat screen. It has the following components.
 - BACKGROUND: It lets you modify the background of the chat screen.
 - COLOR: It lets you modify the color of the background in the chat screen. It accepts the value in
RGBA(<number>,<number>,<number>,<number>).
 - SYSTEM_MESSAGE: It lets you modify the formatting of the system message.

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

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

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

6.2.1.2 Get Session ID of Voice-Admin Login Session

It is required to provide the session ID of the current Voice-Admin's login while using the APIs. Get the access to the server operating system where Ameyo Server is installed and ask your administrator to get the session id from the backend.

6.2.1.3 Chat Theme APIs

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

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

6.2.1.3.1 Add Theme API

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

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

```
<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/dacx/jsonComm
and?command=remote.processor.webchatThemeConfigurationService.addWeb
chatThemeConfiguration&data={sessionId:<SESSION_ID>,themeName:<NAME_
OF_THEME>,isEnabled:<boolean>,webchatThemeConfigurationProperties:[{
chatScreen:CHAT_SCREEN,component:<COMPONENT_NAME>,property:<PROPERTY
_NAME>,value:<VALUE>}]}
```

Replace the following variables.

Variable	Required Value
----------	----------------

<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<SESSION_ID>	Session ID of the Voice-Admin's current login session, which you have obtained through the command given above.
<NAME_OF_THEME>	Here, you have to provide a name for this new theme. It should be provided in text format.
<boolean>	true OR false
<COMPONENT_NAME>	Provide a name for the component, of which formatting you want to modify.
<PROPERTY_NAME>	Provide a name for the property of the already provided component, of which formatting you want to modify.
<VALUE>	<p>Provide a value for the already provided property. Common property value formats are given below.</p> <ul style="list-style-type: none"> • COLOR or TEXT_COLOR: 'RGBA(<number>,<number>,<number>,<number>)' • TEXT: Text format • SHAPE: cornered or rounded.

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

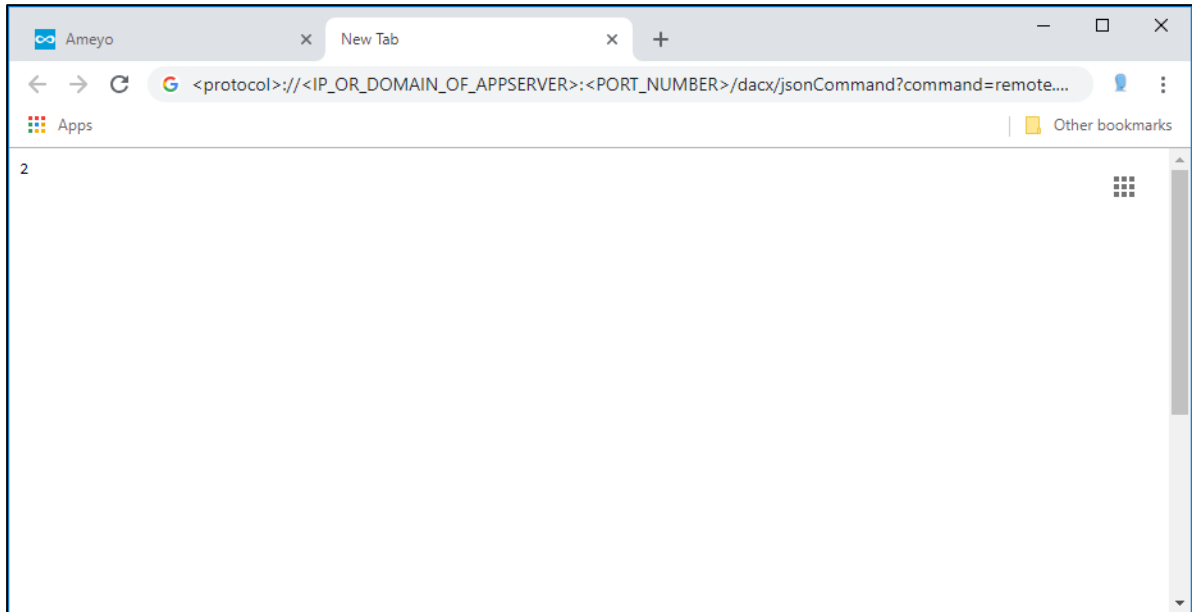


Figure: Add Theme API

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

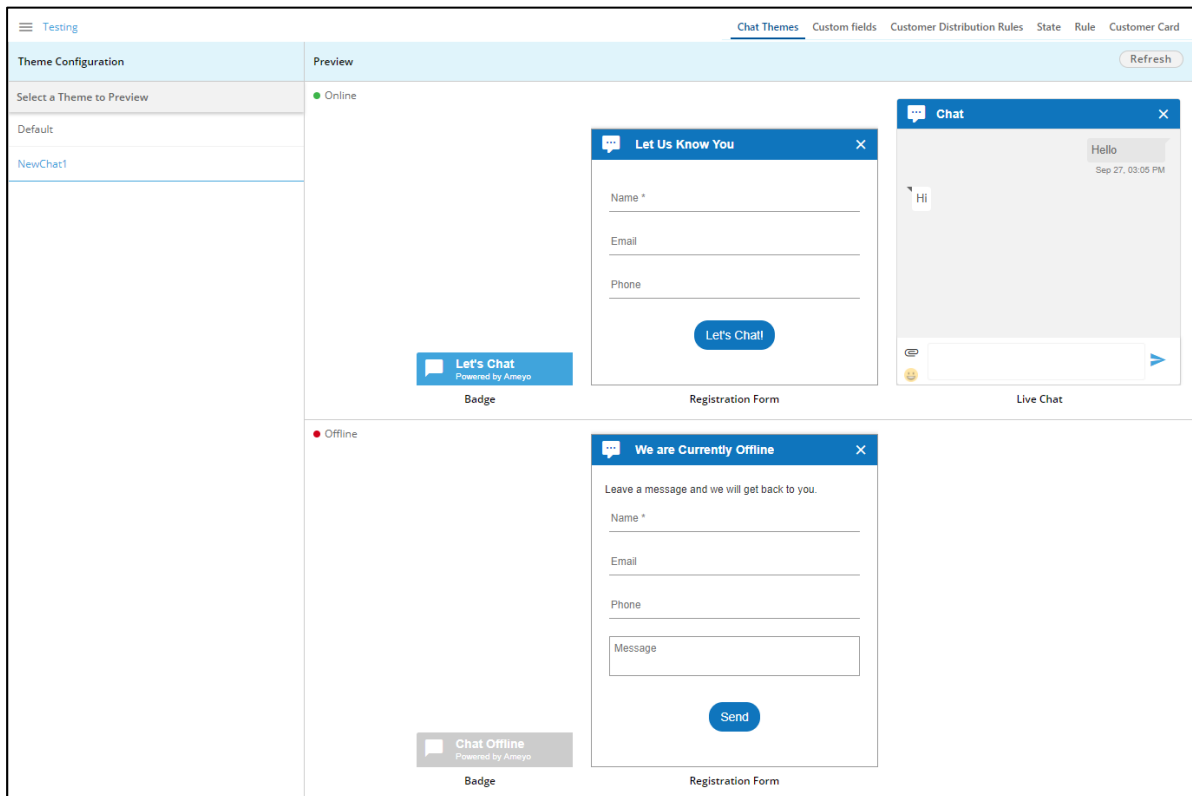


Figure: Added New Theme through API

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

6.2.1.3.2 Add Property to Theme API

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

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

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

Replace the following variables.

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

<COMPONENT_NAME>	Provide a name for the component, of which formatting you want to modify.
<PROPERTY_NAME>	Provide a name for the property of the already provided component, of which formatting you want to modify.
<VALUE>	<p>Provide a value for the already provided property. Common property value formats are given below.</p> <ul style="list-style-type: none"> • COLOR or TEXT_COLOR: 'RGBA(<number>,<number>,<number>,<number>)' • TEXT: Text format • SHAPE: cornered or rounded.

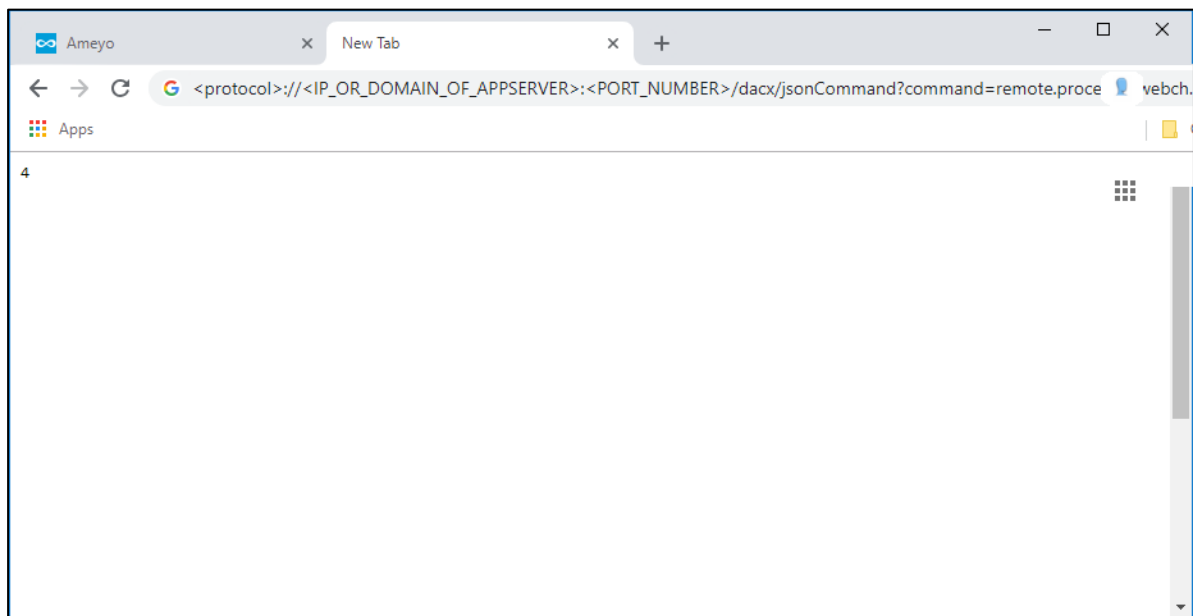


Figure: Add Property to Theme API

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

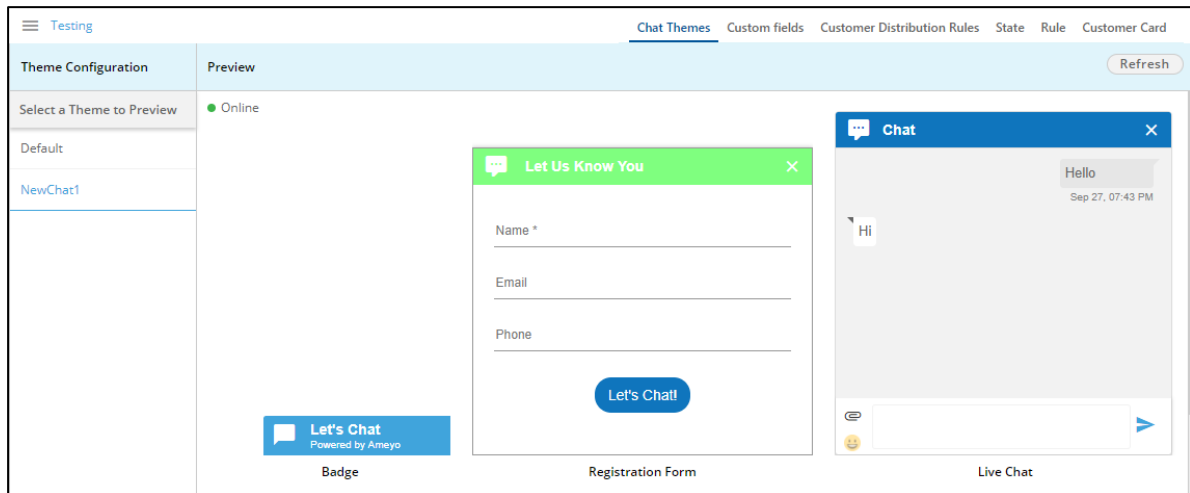


Figure: Modified Header of Registration Form

6.2.1.3.3 Rename Theme API

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

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

```
<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/dacx/jsonComm
and?command=remote.processor.webchatThemeConfigurationService.update
WebchatThemeConfiguration&data={sessionId:<SESSION_ID>,themeId:<THEM
E_ID>,themeName:<NAME_OF_THEME>,enabled:<BOOLEAN>}
```

Replace the following variables.

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

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

6.2.1.3.4 Apply Theme API

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

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

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

Replace the following variables.

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

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

6.2.1.3.5 Get Theme Configuration API

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

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

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

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS

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

6.2.1.3.6 Remove Theme Configuration API

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

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

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

Replace the following variables.

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

<SESSION_ID>	Session ID of the Voice-Admin's current login session, which you have obtained through the command given above.
<THEME_PROPERTY_ID>	<p>Provide the ID of the theme configuration (also called Property ID) that you want to delete. Execute the following commands at the server operating system where Ameyo Server is installed.</p> <pre>psql -U postgres: to enter the PostgreSQL console. \c ameyodb: to enter the database. select * from webchat_theme_configuration_properties;: to get the ID of theme configuration.</pre>

6.2.1.3.7 Remove Theme API

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

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

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

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS

<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<SESSION_ID>	Session ID of the Voice-Admin's current login session, which you have obtained through the command given above.
<THEME_ID>	Provide the ID of the theme that you want to delete.

6.2.2 Custom Fields Tab in Process Settings

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

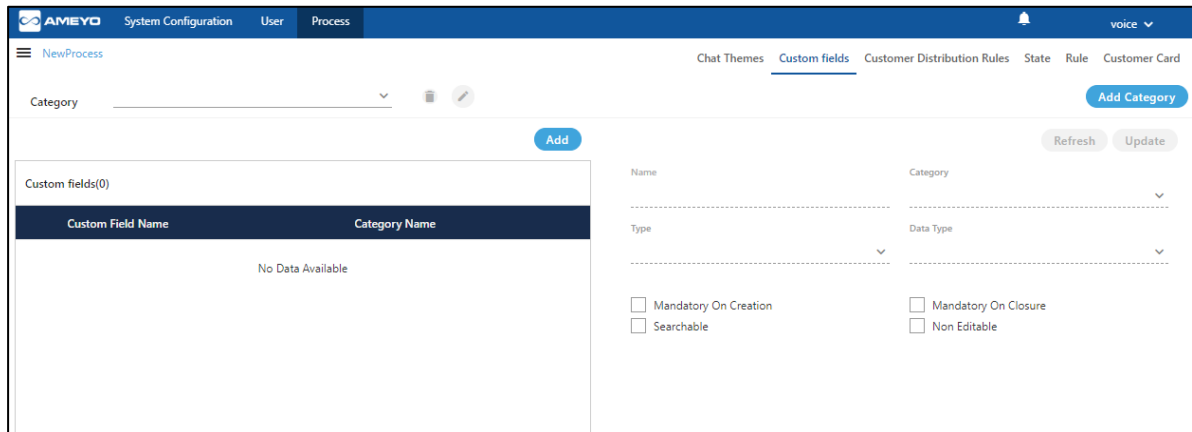


Figure: Custom Fields

6.2.2.1 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.

6.2.2.2 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.

6.2.2.3 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".

6.2.2.4 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

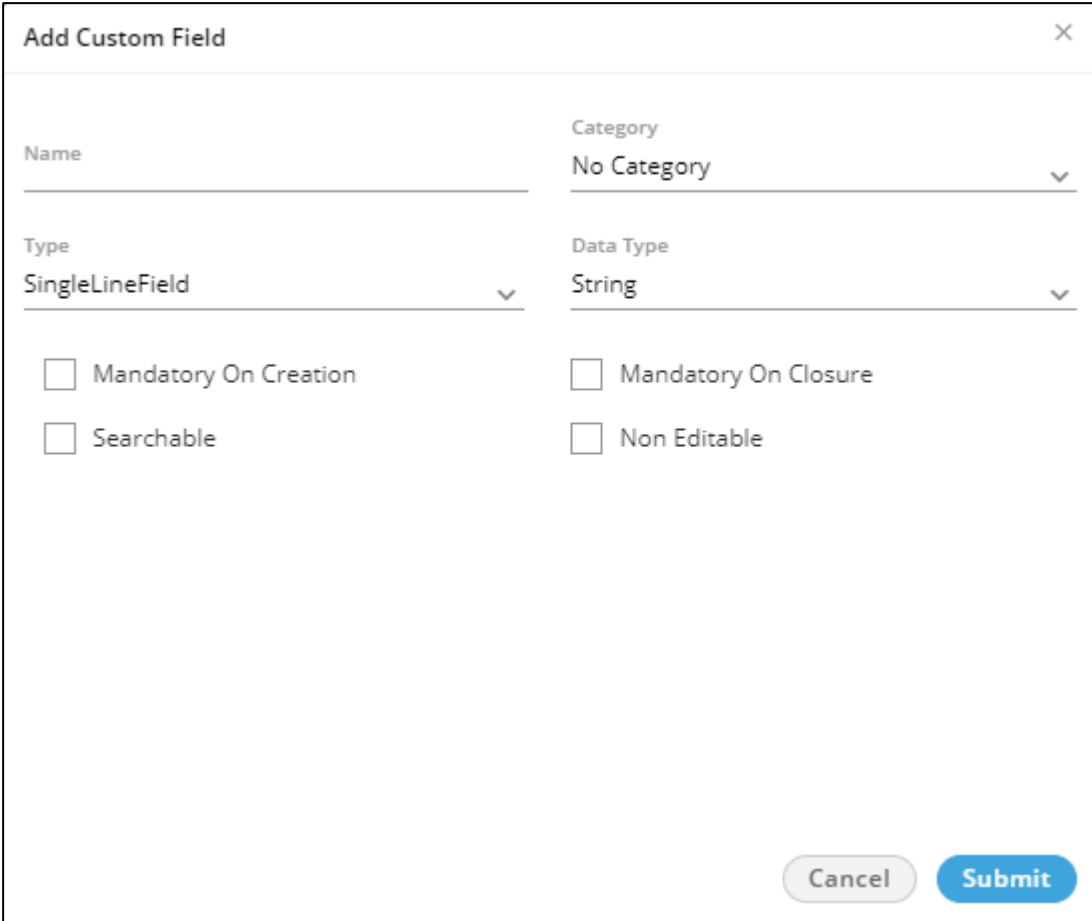
The deleted Category cannot be restored. The custom fields assigned to it will remain unassigned and you have to assign them to other category.

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

6.2.2.5 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.



Add Custom Field [X]

Name _____

Category
No Category [v]

Type
SingleLineField [v]

Data Type
String [v]

Mandatory On Creation

Mandatory On Closure

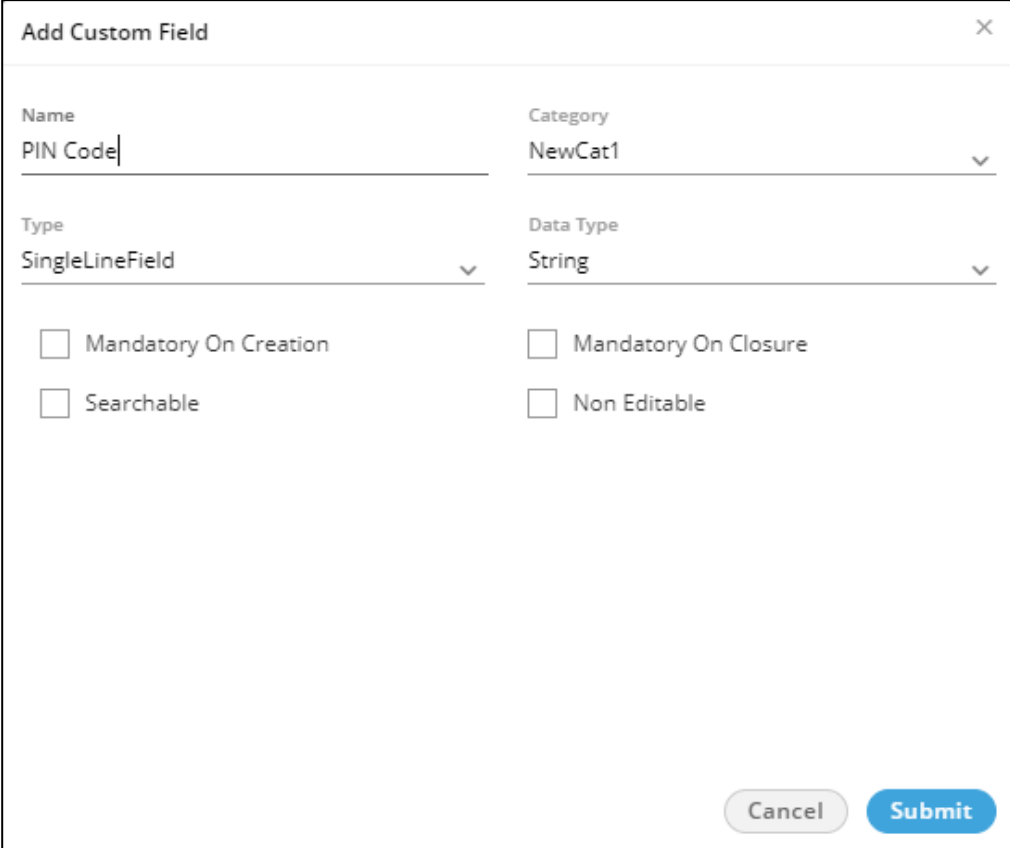
Searchable

Non Editable

[Cancel] [Submit]

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 [X]

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.

Add Custom Field [X]

Name	Category
Address	NewCat1
Type	Data Type
MultiLineField	String

Mandatory On Creation Mandatory On Closure

Searchable Non Editable

Cancel 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

Name: Areas of Interest Category: NewCat1

Type: CheckBox Data Type: String

Possible Values


Field Value	Field Value	Field Value
	Technology	News
+	X	X
Field Value	Field Value	Field Value
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 [X]

Name: Profession | Category: NewCat1 [v]

Type: RadioButton [v] | Data Type: String [v]


Possible Values

Field Value	Field Value	Field Value
+	Doctor	Engineer
	X	X
Field Value	Field Value	Field Value
Advocate	Professional Executive	Business
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 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: Category:

Type: Data Type:

Possible Values

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

Mandatory On Creation Mandatory On Closure
 Searchable Non Editable

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 mutiple values.

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

Add Custom Field [X]

Name: Mode of Communication | Category: NewCat1 [v]

Type: MultiSelectionListBox [v] | Data Type: String [v]


Possible Values

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

Mandatory On Creation Mandatory On Closure
 Searchable 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.

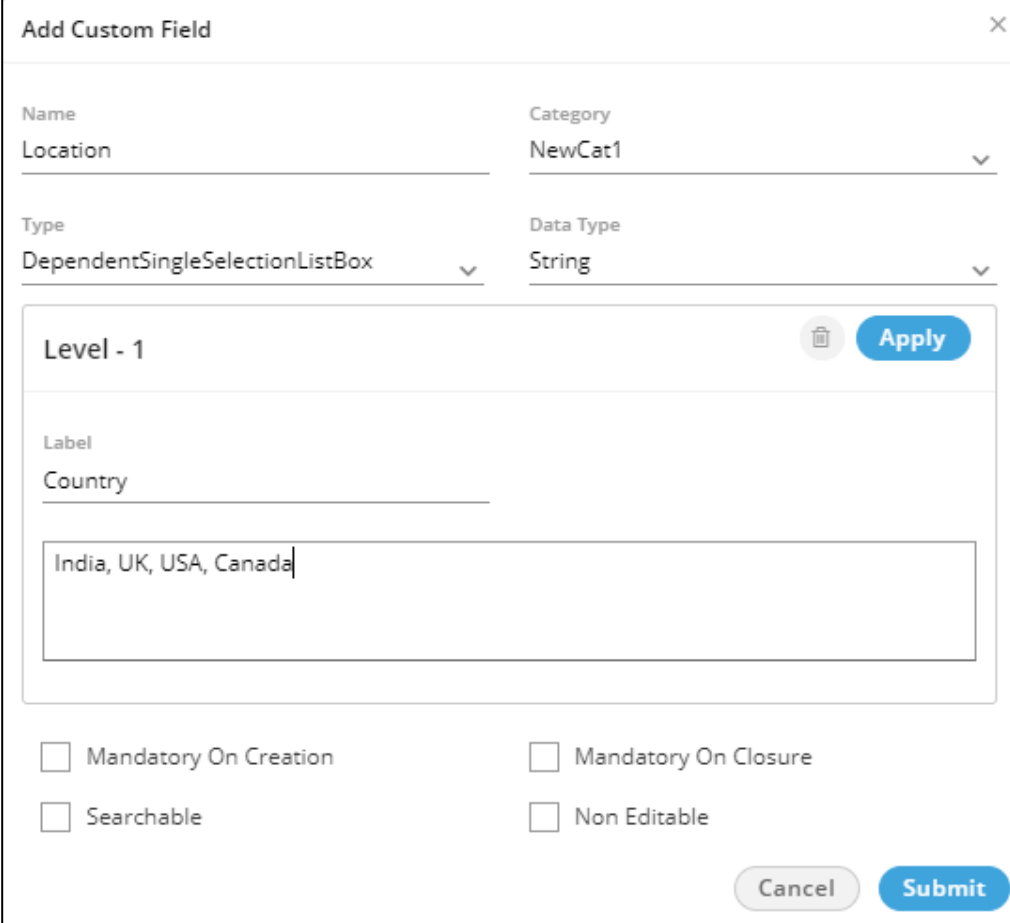
Select any of the following data types for this field.

- 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. Underneath, there is a "Label" field containing "Country" and a text area containing "India, UK, USA, Canada".

At the bottom, there are four checkboxes:

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

Finally, there are "Cancel" and "Submit" buttons at the bottom right.

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 two main sections, "Level - 1" and "Level - 2".

Level - 1: This section has a title "Level - 1" and an "Apply" button. It contains two fields: "Name" with the value "Custom" and "Category" with the value "NewCategory" (indicated by a dropdown arrow). Below these are "Type" with the value "DependentSingleSelectionListBox" and "Data Type" with the value "String" (both with dropdown arrows). At the bottom of this section is a "Label" field with the value "Extension" and a text area containing "Custom fields for Indian customers".

Level - 2: This section has a title "Level - 2", a trash icon, and an "Apply" button. It contains a "Label" field with the value "city" and a "Select Value" dropdown menu with the value "Custom fields for Indian customers".

At the bottom of the dialog 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 is divided into two columns. The left column has a "Name" dropdown menu set to "Date of Birth" and a "Type" dropdown menu set to "DateField". The right column has a "Category" dropdown menu set to "NewCat1" and a "Data Type" dropdown menu set to "DateTime". Below these dropdowns 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: 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 displays the 'Custom Field' configuration page for the 'FAMA' category. On the left, a table lists existing custom fields. On the right, the configuration for a new field is shown, including options for 'Mandatory On Creation', 'Searchable', and 'Mandatory On Closure' (which is checked).

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 options for the new field:

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

Figure: List of Custom Field

6.2.2.6 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.

6.2.2.7 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

6.2.3 Customer Distribution Rules

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

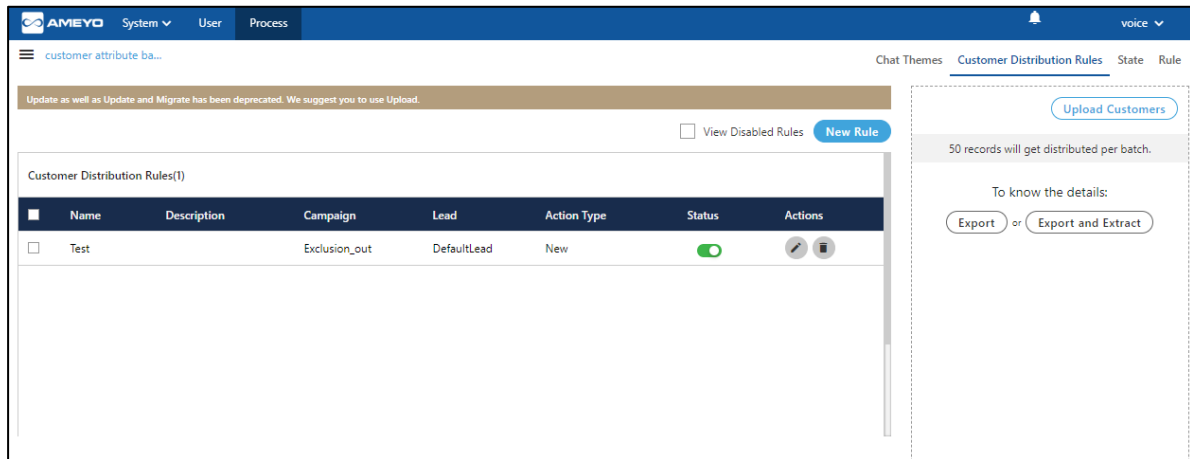


Figure: "Customer Distribution Rules" Tab in Process Settings

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	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.) 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). 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.
Customer Data Upload	Customer Data will be captured from different sources such as Staging Database Architecture, API, files placed at FTP, or by uploading the data manually through CSV file. However, the backend configuration have to be done to instruct the Ameyo System that which data should be inserted.

Step	Process Flow
	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 Customer Prospect table, that is "customer_prospect_<process_id>", of that process.
Mapping the Columns	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 "customer_prospect_column_mapping" table. However, now the user have to specify the ID of the Data Table of that Process of which Ameyo Refresh Table and Customer Prospect Table have to be matched. Please refer to the following document to know more about the same. Document on Ameyo Preprocess https://sites.google.com/a/ameyo.com/engineering/Home/certificationknowledgebase/forward-feed-and-data-allocation-testing
Creating the Rules	"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". A new "Customer Distribution Rules" tab will be created for all existing and new processes in the Ameyo System. Now, the Voice-Admin have to create the customer distribution rules at the Process-level to utilize the data available in "customer_prospect_<process_id>" of a Process.

Step	Process Flow
<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 by 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 that 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 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 "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.</p>

The complete page is divided into two following sections.

- 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.

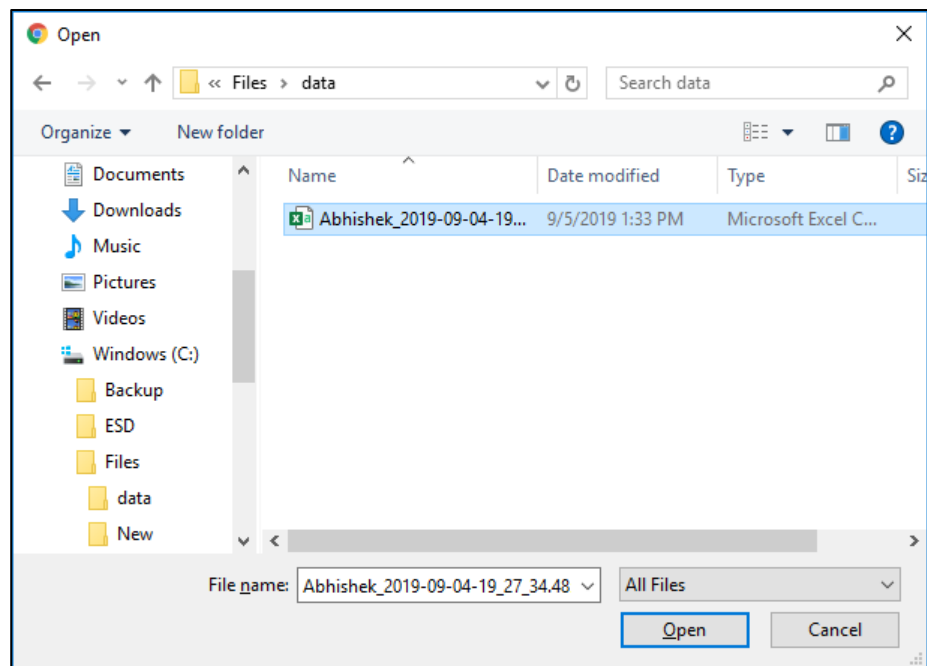


Figure: Open File dialog box

- 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.

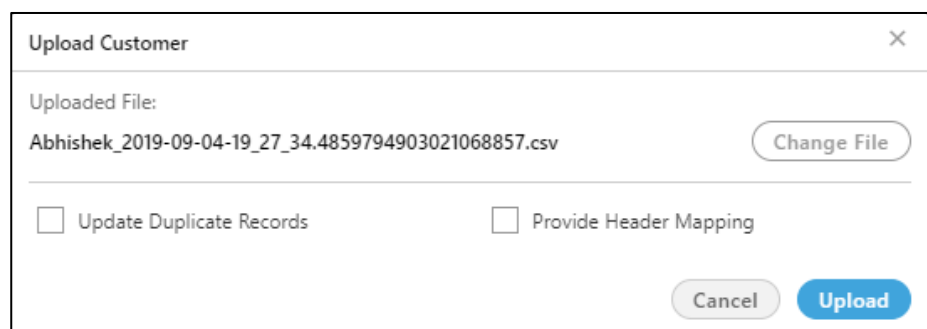


Figure: Pop-up to upload the CSV file

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.

Upload Customer

Uploaded File:
Abhishek_2019-09-04-19_27_34.4859794903021068857.csv Change File

Update Duplicate Records Provide Header Mapping

twitter	timezone
facebook	phone2
name	phone3
phone4	phone5
email	phone1
additional_column	

Cancel Upload

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. At the top, there are navigation tabs: 'Chat Themes', 'Custom fields', 'Customer Distribution Rules' (active), 'State', 'Rule', and 'Customer Card'. The main heading is 'Customer Distribution Rule' with 'Cancel' and 'Save' buttons. The 'New Rule' section contains a 'Rule Name*' text input and a 'Rule Description' text area. The 'Conditions' section has two radio buttons: 'Any of the following' (selected) and 'All of the following'. Below this, a condition is defined with 'Condition' set to 'phone2' and 'Operator' set to '<'. An 'Add New Condition' button is located to the right. The 'Actions' section at the bottom has three dropdown menus: 'Type' (set to 'New'), 'Campaign' (set to 'Abhi_IN'), and 'Lead' (set to 'Abhi_lead').

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.

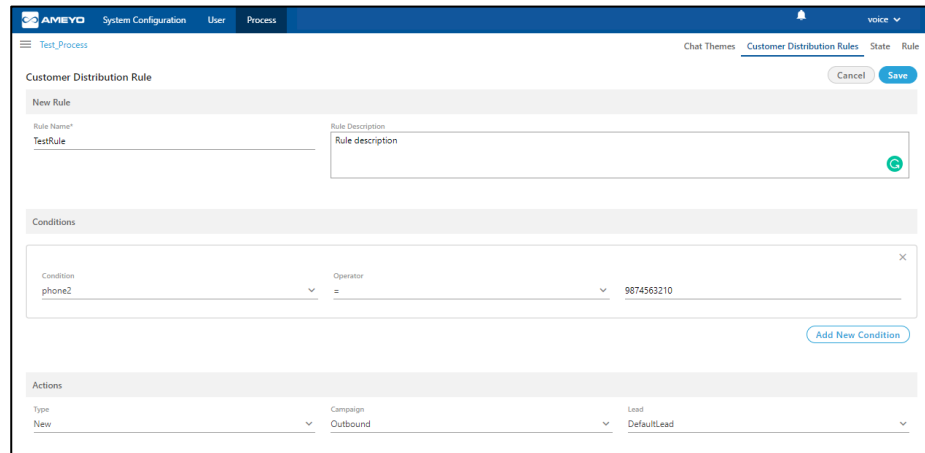



Figure: Sample Rule

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.

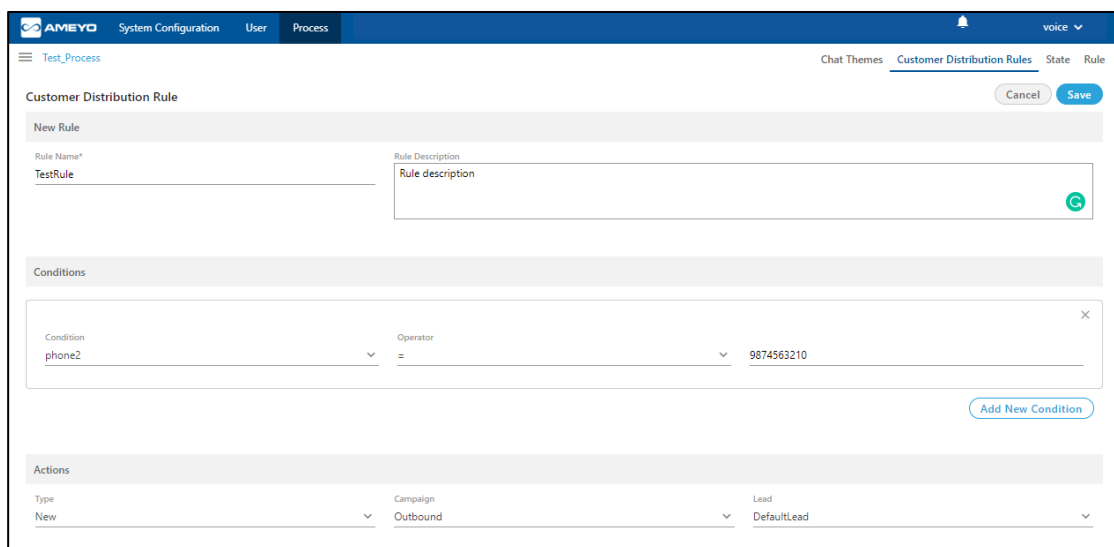


Figure: Edit the Rule

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

Click "Save" button after editing the rule.


- 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.

- 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.
- 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.

6.2.4 State Tab in Process Settings (Licensable)

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

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

6.2.4.1 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.

6.2.4.2 Business Use Case 2 - Division as per Collection Process

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

6.2.4.3 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'

6.2.5 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.

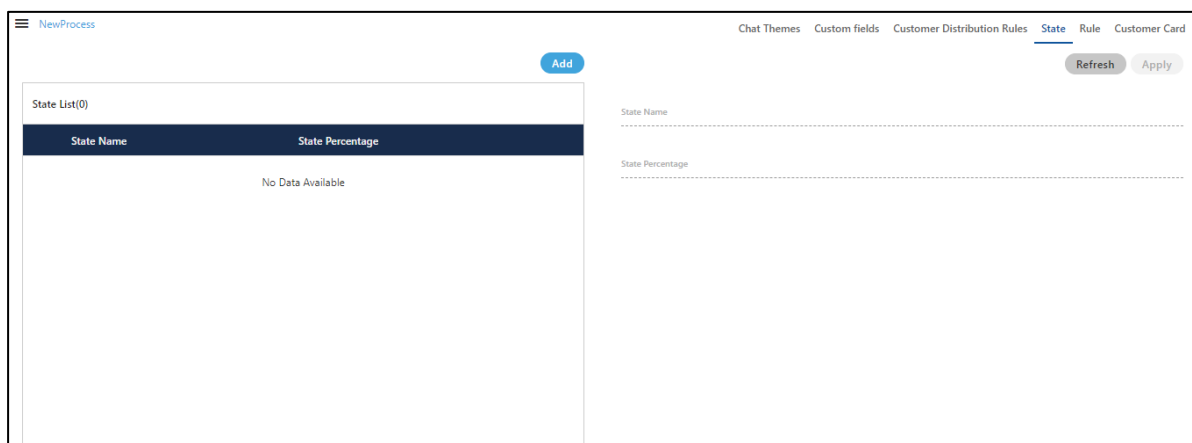
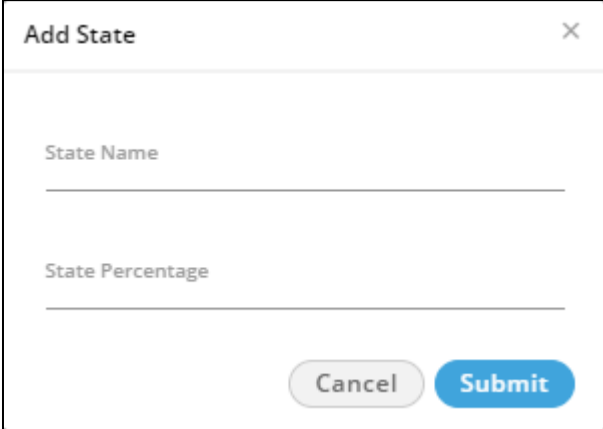


Figure: State Tab

6.2.5.1 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.

6.2.5.2 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.

6.2.5.3 Modify a State

Perform the following steps to modify a state.

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

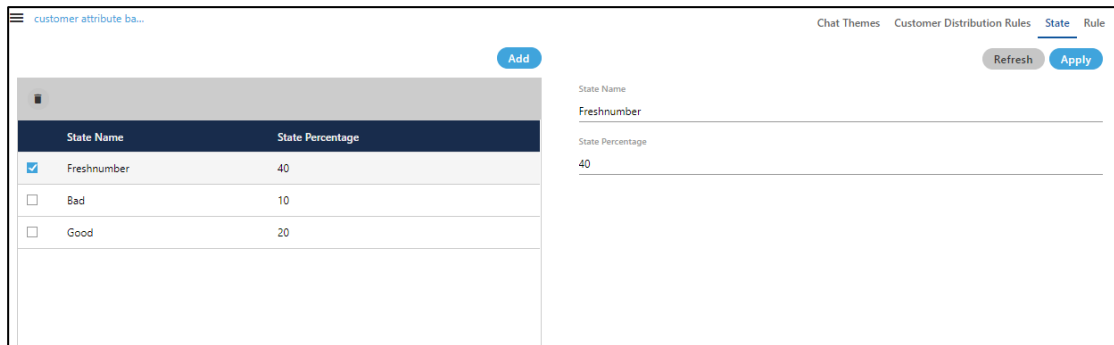


Figure: Details of a State

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.

6.2.5.4 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.

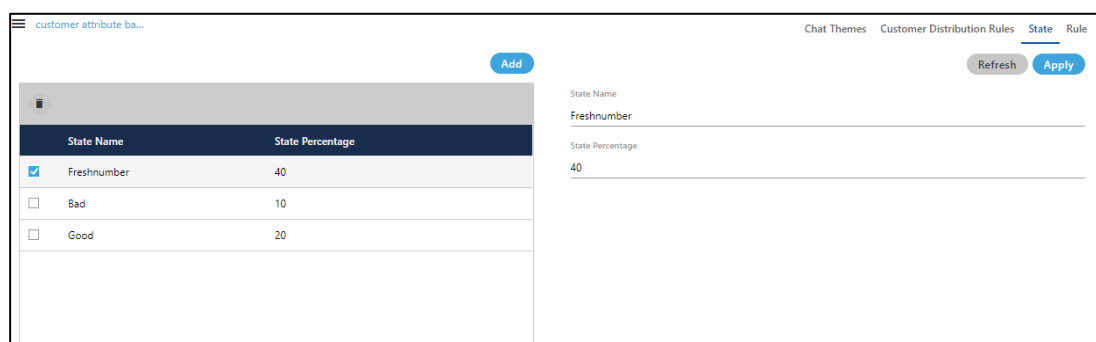



Figure: Details of a State

2. Click . It shows the following warning message.

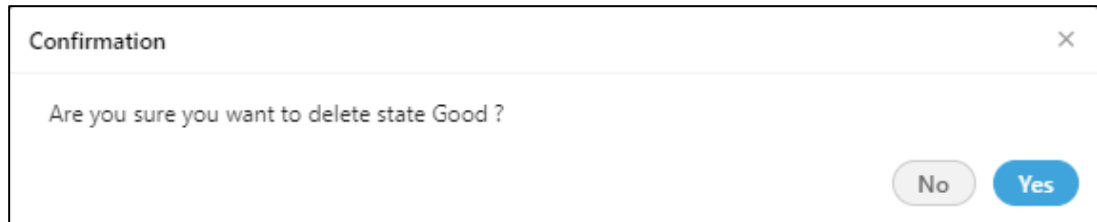


Figure: Warning before deleting a State

3. Click "Yes" to delete the state.

6.2.6 Rule Tab for PACE in System Settings (Licensable)

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

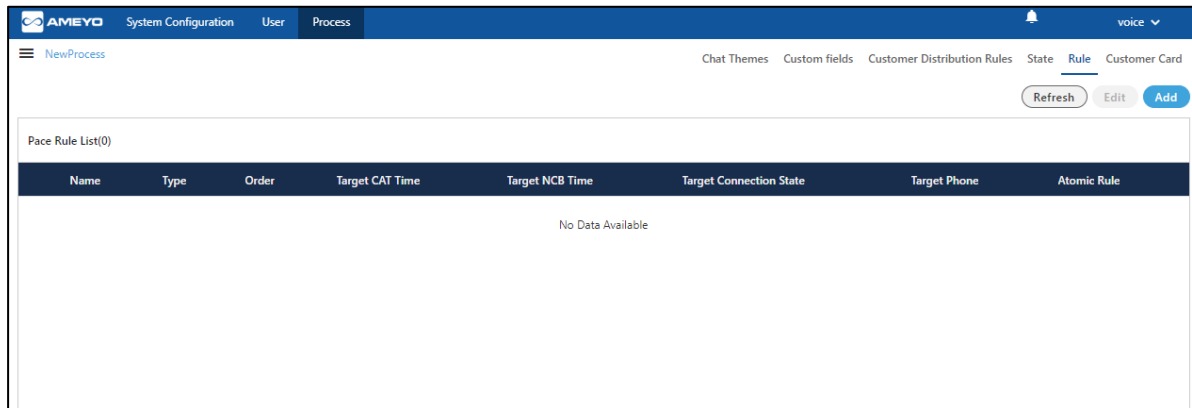


Figure: Rule Tab to Manage PACE

6.2.6.1 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.

The screenshot shows a dialog box 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:** 1
- CAT Time:** Three input fields for Hour(s), Minutes, and Seconds.
- NCB Time:** Three input fields for Hour(s), Minutes, and Seconds.
- Target Connection State:** state1 (dropdown menu)
- Target Phone:** (empty text input field)

At the bottom right, there are two buttons: "Cancel" (disabled) and "Next" (active).

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.

- Except "freshNumber", "catNumber", and "ns", you can select a customized state upon which the rule will be applied.

Figure: Sample Details

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

Figure: Add Condition

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

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

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

10. Select any of the following operators.

- =
- <>
- <=
- >=

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

12. Click "Add" to add the rule.

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

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

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

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.

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.

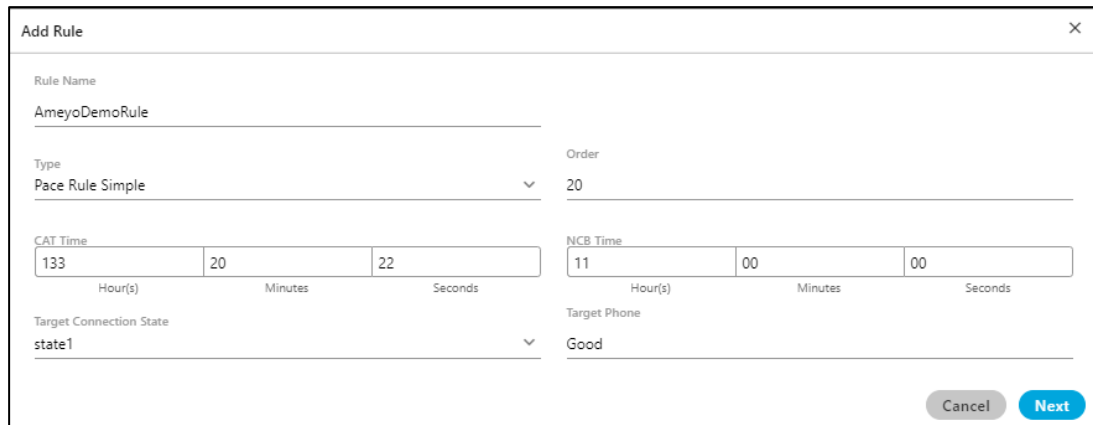
Name	Type	Order	Target CAT Time	Target NCB Time	Target Connection State	Target Phone	Atomic Rule
<input type="checkbox"/> PaceRuleforGood	Pace Rule Simple	20	13:30:00	11:00:00	Good	9856320147	View

Figure: List of State Rules

6.2.6.2 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.



The screenshot shows a modal window 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 modal, there are two buttons: "Cancel" (grey) and "Next" (blue).

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.

6.2.6.3 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.



The screenshot shows a modal window titled "Confirmation" with a close button (X) in the top right corner. The text inside the modal asks: "Are you sure you want to delete state Test ?". At the bottom right, there are two buttons: "No" (grey) and "Yes" (blue).

Figure:Delete PACE Rule

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

6.2.7 Customer Card Tab in Process Settings

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

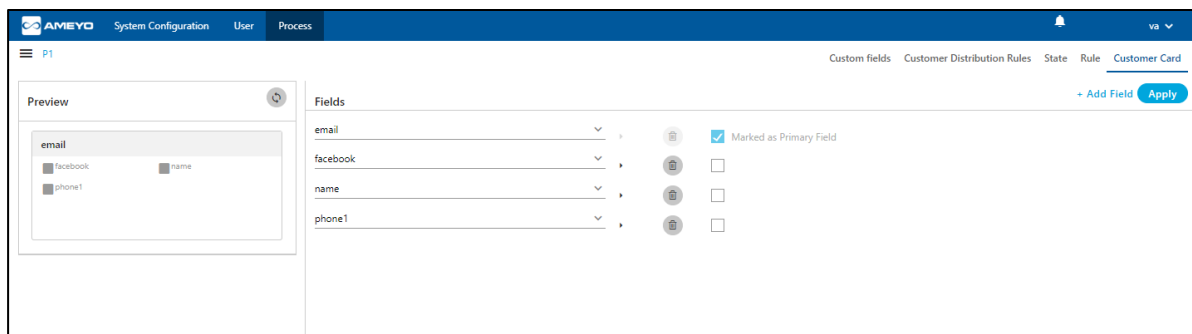


Figure: Customer Card Tab

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

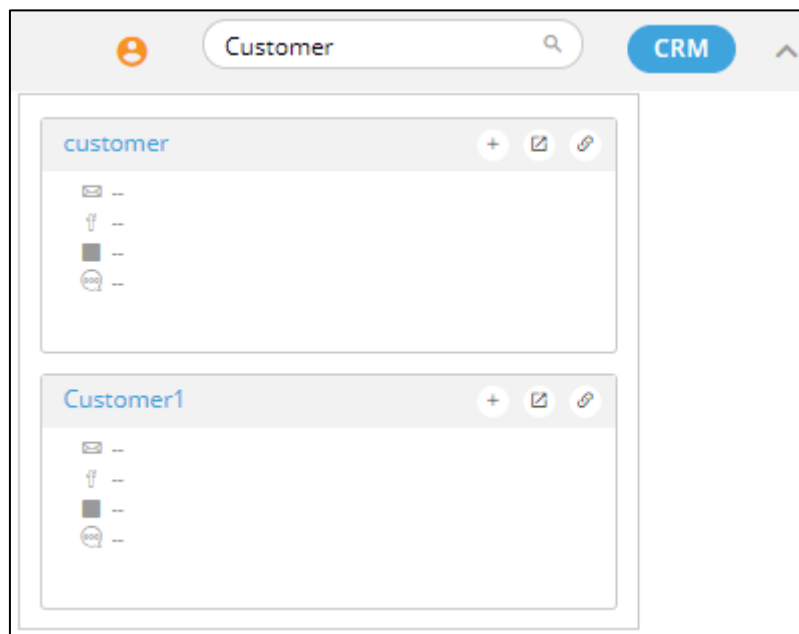


Figure: Displaying Customer Cards in Search

6.2.7.1 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.

6.2.7.2 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.

6.2.7.3 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.







Fields			
email	▼ ▶		<input checked="" type="checkbox"/> Marked as Primary Field
facebook	▼ ▶		<input type="checkbox"/>
name	▼ ▶		<input type="checkbox"/>
phone1	▼ ▶		<input type="checkbox"/>
phone2	▼ ▶		<input type="checkbox"/>
phone3	▼ ▶		<input type="checkbox"/>

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.

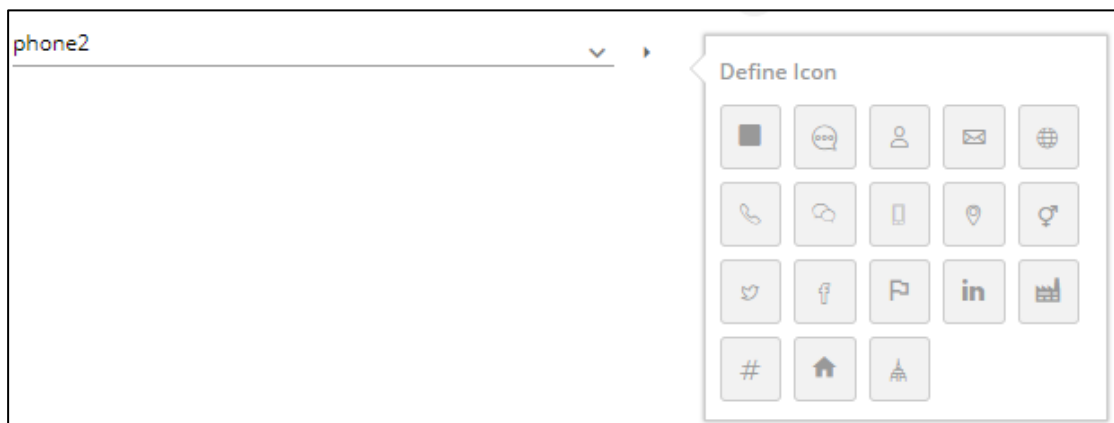


Figure: Select an icon

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.

6.2.7.4 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.

6.2.7.5 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.

6.2.7.6 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.

6.2.7.7 Sample Customer Card

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

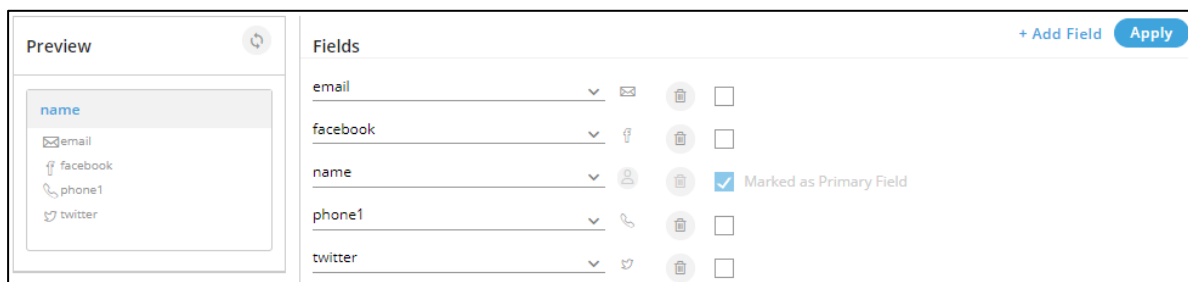
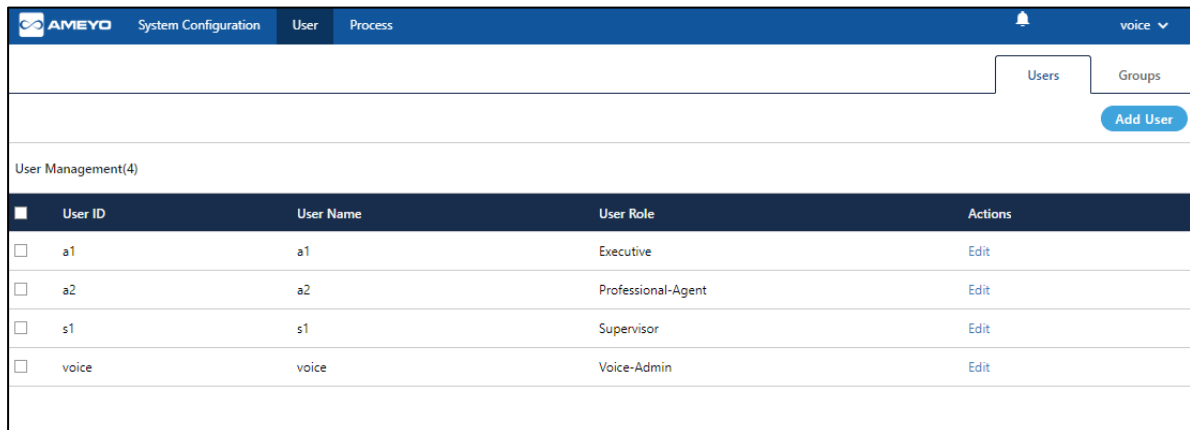


Figure: Modified Customer Card

7. 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
<input type="checkbox"/> a1	a1	Executive	Edit
<input type="checkbox"/> a2	a2	Professional-Agent	Edit
<input type="checkbox"/> s1	s1	Supervisor	Edit
<input type="checkbox"/> voice	voice	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...](#)

7.1 User Management

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

The screenshot shows the 'User Management' section of the Ameyo system. At the top, there are navigation tabs for 'System Configuration', 'User', and 'Process'. Below these, there are sub-tabs for 'Users' and 'Groups', with an 'Add User' button next to the 'Users' tab. The main content area is titled 'User Management(4)' and contains a table with the following data:

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

Figure: User Management

7.1.1 Add User

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

The screenshot shows the 'Create User' form. It has a 'Cancel' button and a 'Save' button at the top right. The form is divided into a 'General Information' section with the following fields:

- User ID: Text input field
- System Role: Drop-down menu (currently set to 'Administrator')
- User Name: Text input field
- Password: Text input field
- Confirm Password: Text input field
- Allowed Chat Extensions: Drop-down menu (set to '0')
- Allowed Ticket Extensions: Drop-down menu (set to '0')
- Email Id: Check box (unchecked)
- Login Policy: Drop-down menu (set to 'Verify Before Force Login')
- Enable screen recording: Check box (unchecked)

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 group, and the group manager monitors the activity of the agents assigned in that group.
3. Enter the password in the provided text box and confirm the password by re entering the same in "Confirm Password" text box.
 4. Enter the description about the user in the provided text area.

5. Select the Allowed Interaction Extensions from the drop down field. Allowed Interaction Extension means that number of media interactions that is chat, mails, social media etc. can a Agent handle.
6. Select the number of Ticket Extensions which a user can handle at a time.
7. To enable E-mail ID for user check the checkbox provided and enter the E-mail ID of the user in the textbox.
8. **Login Policy:** Select the Login policy from the provided drop down box.
9. Click "Save" to add the user.
10. Click "Cancel" to discard the changes.

7.1.2 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.

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. 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.
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.
- **Confer Call**: It restricts the user to confer the call.

If the "Confer Call" privilege has been masked for a Supervisor, then the "Call Conference" for that Supervisor will also be masked in "Live Monitoring" Tab. It is a Campaign-level Privilege, which can be configured here. The change made by a Supervisor for this privilege will override the privilege configured by the Administrator.

If a user is assigned in multiple campaigns and 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.

7.1.3 Delete User

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

Perform the following steps to delete the user.

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

- Click "Delete" to delete the selected user. It shows the following warning message.



Figure: Warning before deleting a User

- Click "Yes" to delete the user.

7.1.4 User Card

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

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"/> Administrator	agent1	Executive	Edit
<input type="checkbox"/> analyst	analyst	Analyst	Edit

Figure: User Card

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

7.2 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 the "Group Manager" is able to manage and supervise them.

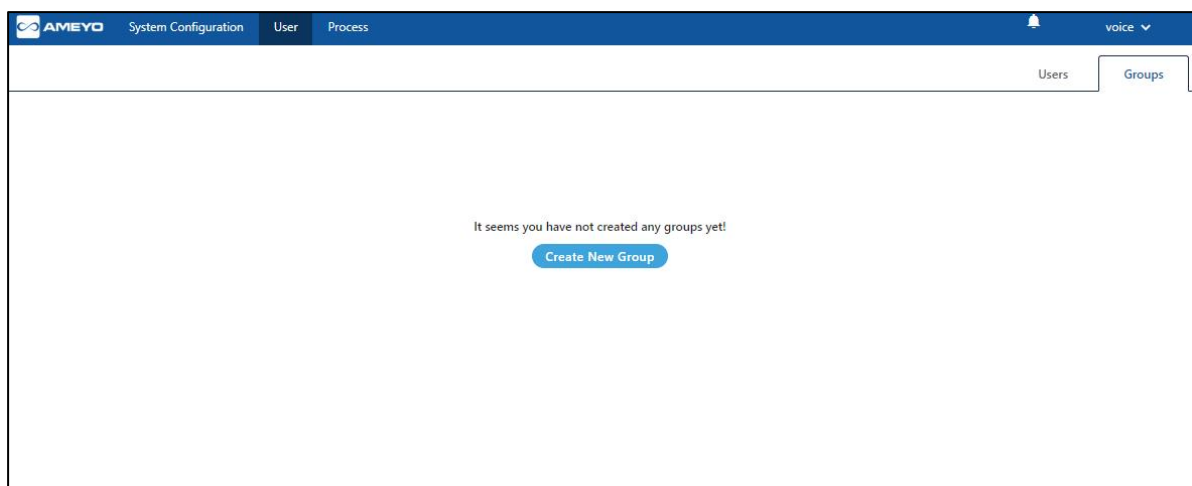


Figure: Group Management

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

7.2.1 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.

CREATE GROUP

Group Name*

Description

Assign Group Manager and Users

My Available Users(2)


<input type="checkbox"/>	User ID	User Name	Role	Groups Assigned To	Skills
<input type="checkbox"/>	a2	a2	Professional-Agent	-	--
<input type="checkbox"/>	a1	a1	Executive	-	--

Assigned Users(0)

<input type="checkbox"/>	User ID	User Name	Role	Groups Assigned To	Skills
No Data Available					

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.

Users | Groups

EDIT GROUP

Group Name*

Description

Assign Group Manager and Users


My Available Users(3)

<input type="checkbox"/>	User ID	User Name	Role	Groups Assigned To	Skills
<input type="checkbox"/>	pa1	pa1	Professional-Agent	-	--
<input type="checkbox"/>	g2	g2	Group Manager	Group2	--
<input type="checkbox"/>	pa2	pa2	Professional-Agent	-	--

Assigned Users(3)


<input type="checkbox"/>	User ID	User Name	Role	Groups Assigned To	Skills
<input type="checkbox"/>	a2	a2	Executive	Group1, Group2	--
<input type="checkbox"/>	a1	a1	Executive	Group1, Group2	--
<input type="checkbox"/>	g1	g1	Group Manager	Group1, Group2	--

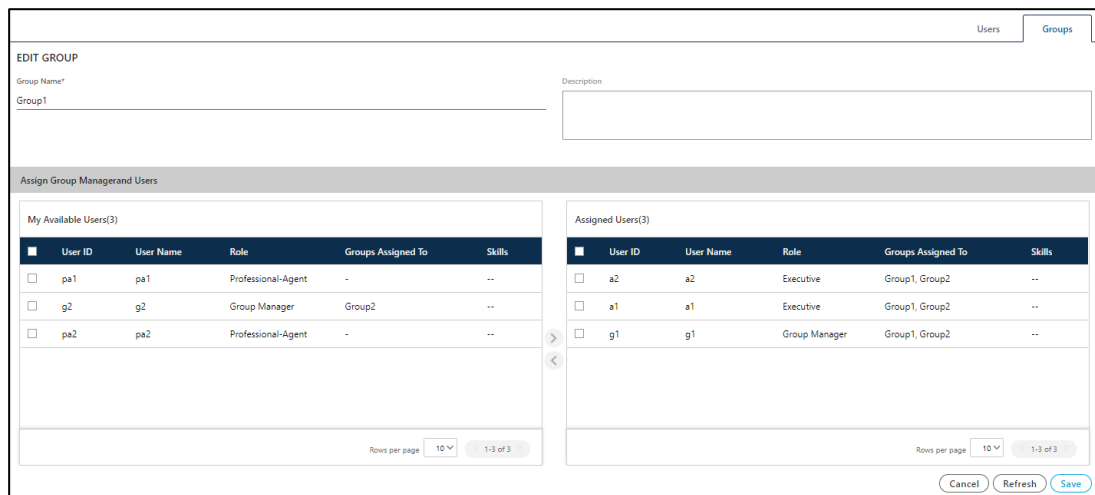
Figure: Sample Group

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.

7.2.2 Edit the Group

Perform the following steps to edit the group.

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




The screenshot shows the 'EDIT GROUP' interface. At the top, there are tabs for 'Users' and 'Groups'. Below the tabs, there are input fields for 'Group Name*' (containing 'Group1') and 'Description'. A section titled 'Assign Group Manager and Users' contains two tables: 'My Available Users(3)' and 'Assigned Users(3)'. Both tables have columns for 'User ID', 'User Name', 'Role', 'Groups Assigned To', and 'Skills'. The 'My Available Users' table lists users pa1, g2, and pa2. The 'Assigned Users' table lists users a2, a1, and g1. At the bottom right, there are 'Cancel', 'Refresh', and 'Save' buttons.

Figure: Edit the Group

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

7.2.3 Delete Group

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



A screenshot of a confirmation dialog box. The title bar reads "Confirmation". The main text asks, "Are you sure you want to delete the group?". At the bottom right, there are two buttons: a grey "Cancel" button and a blue "Delete" button.

Figure: Delete Group

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

7.2.4 Assign Group Manager or Agents in Multiple Groups

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

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. Parallel Predictive Voice Campaign: This campaign is an outbound voice campaign, but the dialer will have the features of Parallel Predictive Algorithm to dial the calls.
- VI. Voice Blast Campaign: This campaign provides you the facility to broadcast the prerecorded messages to the clients automatically.

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

4. **General Settings**: Now, the steps to configure the General Settings are different for each campaign type. These steps are mentioned hereinbelow.
5. **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.
6. **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.
7. **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.
4. **Outbound Voice Campaign:** Provide the following inputs to create an outbound voice campaign.

- A. 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.

- B. 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.

- C. 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

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

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

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

F. 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.

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

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

- I. 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.
- J. File Format: Select any of the following file formats in which the voice recordings will be saved.
- talaw
 - tulaw
 - tgsm
 - tg729
 - alaw
- K. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.

- L. 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.
 - M. 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 Voice-Admin 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. If you want to configure same ACW Timeout value for both Connected and Not Connected Calls, then just enter the timeout value.
 - II. 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 form titled "ACW Settings". It contains a text input field labeled "ACW Timeout (in secs)*" with the value "30" entered. Below the input field is a checkbox labeled "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.

- B. **Voice Logs Settings:** Here, you can manage the settings related to the Voicelogs.
 - I. **Voice Logs Enabled:** Check this box to enable the logging of voice logs. However, you can uncheck it to disable the voice logs.
 - II. **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.
 - C. **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.
 - D. **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.
5. **Parallel Predictive Voice Campaign:** Provide the following inputs to create a voice campaign that will be equipped with the features of Predictive Dialing Algorithm.
- A. **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.

- B. 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.

- C. 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. At the top, there are fields for Process (Test), Campaign Type (Parallel Predictive Voice Campaign), Campaign Name (TestParallelPredictive), and Campaign Description (Testing Parallel Predictive Campaign). Below this is a 'Settings' section with various fields: Preview URL, CRM URL, Disposition URL, Disposition Plan (DefaultOVCDDispositionPlan), Column mappings (DefaultAdvancedOutboundColumnMapping), Peak Call Count (100), No. of Last Calls (10), Caller ID (NODID), Time Zone Mapper Type (Lead Based Campaign Time Zone Mapper), File Format (tg729), and Max Callback Count (100). There are also checkboxes for 'Enable AMD', 'Configure for connected and not connected calls', and 'Play Periodic Beep'. At the bottom, there are three tabs: 'ACW Settings' (ACW Timeout: 30), 'Voice Logs Settings' (Voice Logs Enabled), and 'Auto Answer' (Auto Answer Enabled, Inherit Settings From Parent). On the right side, there is a 'FAQ' section with questions about Peak Call Count, Max Callback Count, Dial on Timeout, Caller ID, and ACW Timeout. Below the FAQ is a 'DIY Troubleshooter' section with a list of questions to consider if auto-dial is not working.

Figure: Creating New Parallel Predictive Voice Campaign

- D. Disposition Plan: Select any of the following disposition plans.

- DefaultOVCDDispositionPlan
- DefaultIVADDispositionPlan
- DefaultVBCDispositionPlan
- DefaultCCDispositionPlan


- DefaultIVRCDispositionPlan
 - DefaultCSTACDispositionPlan
 - DefaultAOVCDDispositionPlan
- E. Column Mapping: It shows the default and custom column mappings. You can select any one.
- F. 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.
- G. No. of Last Calls: Provide the maximum number of last calls.
- H. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.
- I. 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.

- J. File Format: Select any of the following file formats in which the voice recordings will be saved.
- talaw
 - tulaw
 - tgsn
 - tg729
 - alaw
- K. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.
- L. 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.
- M. 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 Voice-Admin 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.

4.

A.

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



ACW Settings

ACW Timeout (in secs)*

30

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.

- B. **Voice Logs Settings:** Here, you can manage the settings related to the Voicelogs.
- I. **Voice Logs Enabled:** Check this box to enable the logging of voice logs. However, you can uncheck it to disable the voice logs.
 - II. **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.
6. **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.
- A. **Column Mapping:** It shows the default and custom column mappings. You can select any one.

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

The screenshot shows the 'New Campaign' interface. At the top, there are fields for 'Process' (P1), 'Campaign Type' (Voice Blast Campaign), 'Campaign Name', and 'Campaign Description'. Below this is a 'Settings' section with a table-like structure:

Settings	Peak Call Count*	Caller ID
Columns mapping DefaultBlastColumnMapping	100	NODID
Time Zone Mapper Type Lead Based Campaign Time Zone Mapper	File Format talaw	

At the bottom, there are 'Available Users(2)' and 'Assigned Users(0)' fields. On the right, there is an 'FAQ' section with questions like 'What is Peak Call Count?', 'What is No. of Last Calls?', 'What is Max Callback Count?', 'What is Caller ID?', 'What is SLA Threshold?', and 'What is ACW Timeout?'.

Figure: Creating New Voice Blast Campaign

- D. 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.

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

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

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

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

Only Supervisors can be added in Voice Blast Campaign.

The screenshot displays a 'Manage' interface with two columns: 'Available Users (6)' and 'Assigned Users (0)'. The 'Available Users' column contains a table with the following data:


<input type="checkbox"/>	User ID	User Name
<input type="checkbox"/>	teste2	teste2
<input type="checkbox"/>	sup1	sup1
<input type="checkbox"/>	testpa2	testpa2
<input type="checkbox"/>	sup2	sup2
<input type="checkbox"/>	testpa1	testpa1
<input type="checkbox"/>	teste1	teste1

The 'Assigned Users' column is currently empty. Navigation arrows are visible between the two columns.

Figure: Section to assign users

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

1. 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.

2. Click  icon to add the selected users.

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

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

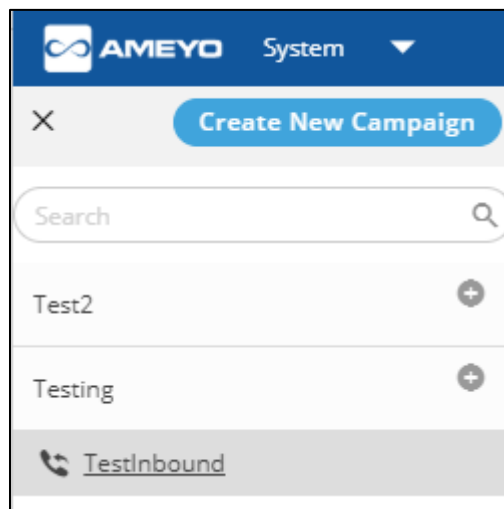


Figure: Created the Campaign

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

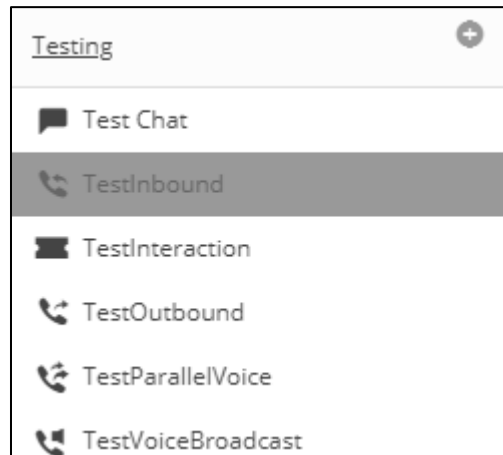


Figure: Created Multiple Campaigns

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

9. Changed System Configuration After Creating Campaign

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

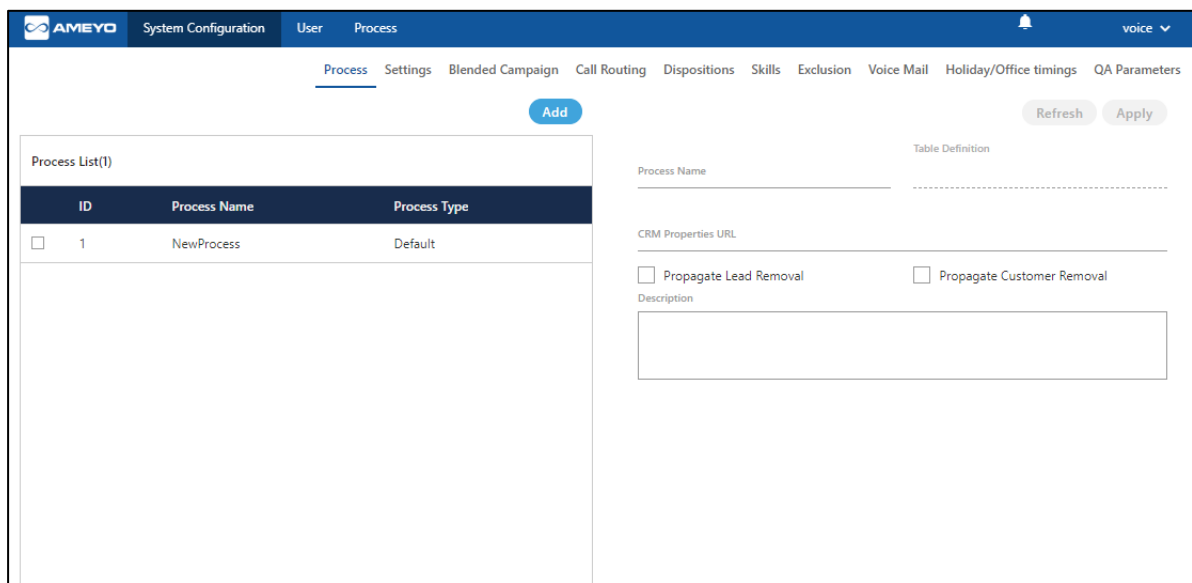


Figure: New Tabs after creating the campaign

Click the links to know more about them.

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

9.1 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.

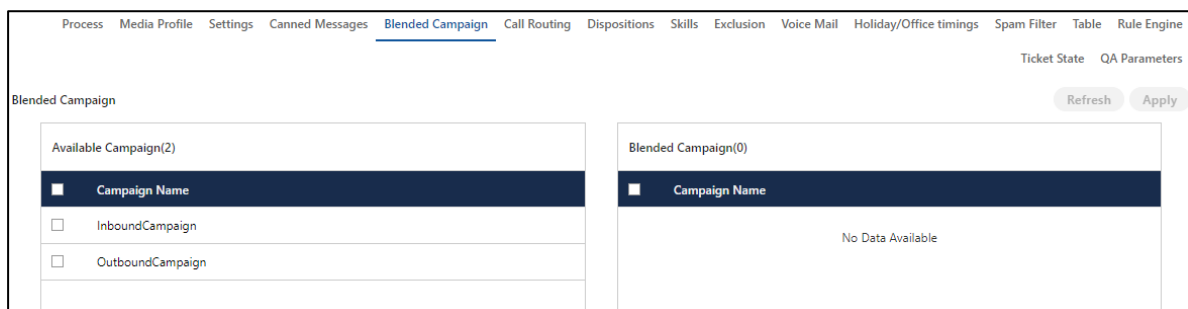



Figure: Blended Campaign

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.

9.2 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			
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.

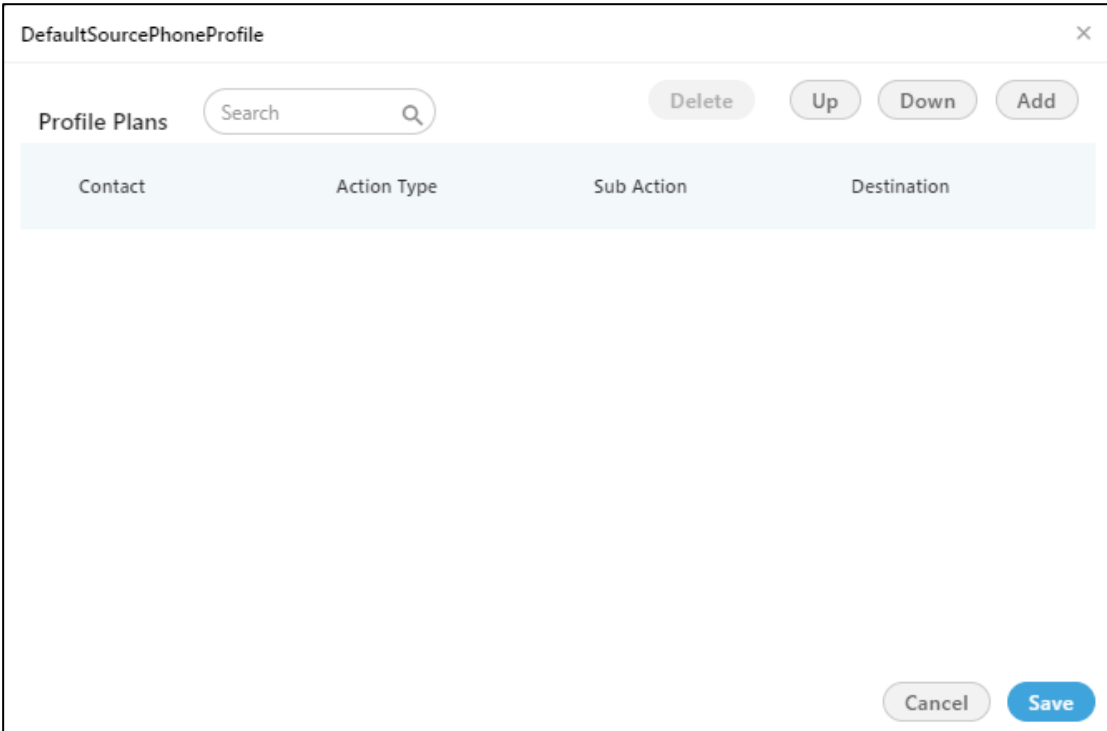
Order of policies can be moved from the "Up" and "Down" button. Policy will be followed in the sequential order from top to bottom.

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

9.2.1 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.



The screenshot shows a pop-up window titled "DefaultSourcePhoneProfile" with a close button (X) in the top right corner. Below the title bar, there is a "Profile Plans" section with a search input field containing the text "Search" and a magnifying glass icon. To the right of the search field are four buttons: "Delete", "Up", "Down", and "Add". Below this is a table with a light blue header row containing the following columns: "Contact", "Action Type", "Sub Action", and "Destination". The table body is currently empty. At the bottom right of the window, there are two buttons: "Cancel" and "Save".

Figure: Blank Plan for DefaultSourcePhoneProfile

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

Contact	Action Type	Sub Action	Destination
<input type="checkbox"/>	feature.action	cc.call.context.based.prof	DefaultCallContextProfile

Figure: Blank Row for DefaultSourcePhoneProfile and DefaultDestinationPhone Profile

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

Figure: Blank Row for CallContextProfile and DefaultDestinationPhone Profile

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

OR

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

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

- II. `did.based.phone.feature`
 - III. `manual.dial.feature`
- B. **Profile.action:** Select it to route the call to another profile plan. When selected, Sub-Action drop-down shows the following options.
- I. `cc.call.context.based.profile`: Select it to transfer the call to the Call Context based Profiles. When selected, the available Call Context Profiles will be listed in the Destination drop-down menu.
 - II. `cc.destination.contact.based.profile`: Select it to transfer the call to the Destination Contact based Profiles. When selected, the available Destination Contact Profiles will be listed in the Destination drop-down menu.
 - III. `cc.source.contact.based.profile`: Select it to transfer the call to the Source Contact based Profiles. When selected, the available Source Contact Profiles will be listed in the Destination drop-down menu.
6. **Destination:** If "feature.action" is selected in Action Type, then you have to select the available destination numbers in this drop-down menu. If "profile.action" is selected, you can select the relevant profile policy such as "DefaultCallContextProfile" for "cc.call.context.based.profile" sub-action, "DefaultDestinationPhoneProfile" for "cc.destination.contact.based.profile", and "DefaultSourcePhoneProfile" for "cc.source.contact.based.profile".
7. You can add multiple rows in a plan of DefaultSourcePhoneProfile.

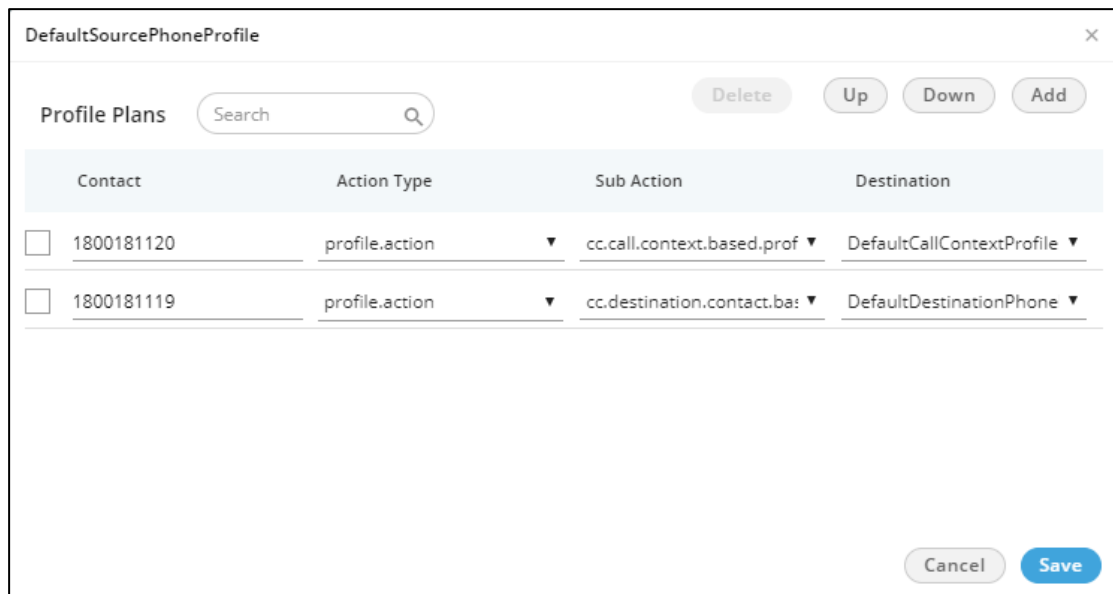


Figure: Adding Plan for DefaultSourcePhoneProfile

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

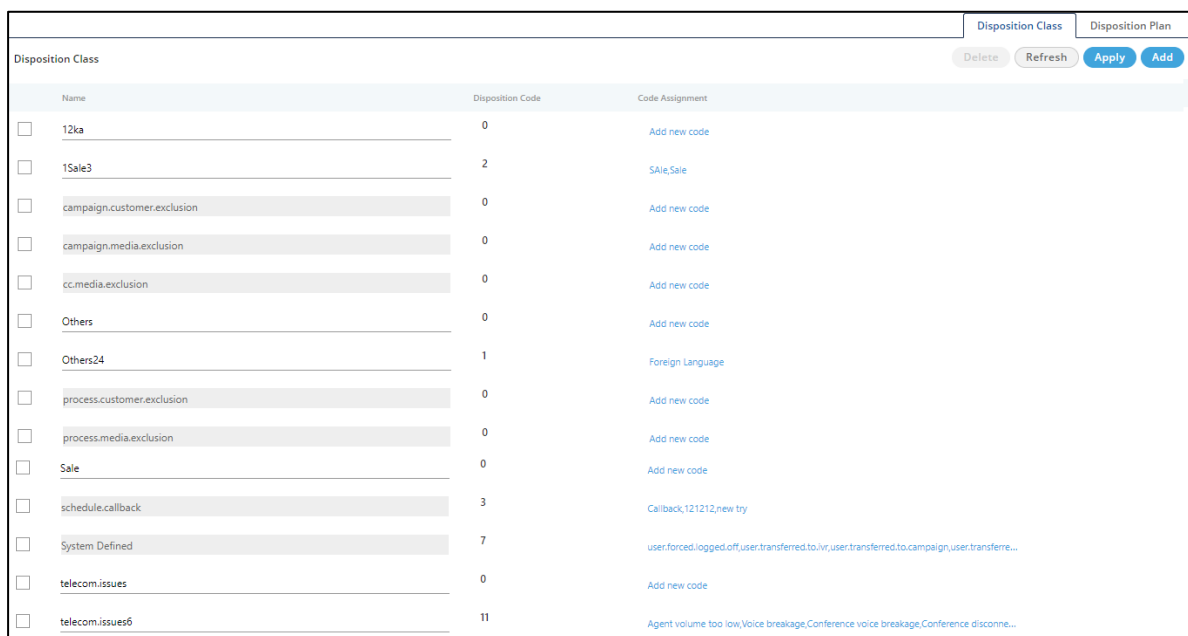
You can add and modify the plan for all policies.

9.3 Dispositions

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

9.3.1 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.



Name	Disposition Code	Code Assignment
<input type="checkbox"/> 12ka	0	Add new code
<input type="checkbox"/> 1Sale3	2	SAle,Sale
<input type="checkbox"/> campaign.customer.exclusion	0	Add new code
<input type="checkbox"/> campaign.media.exclusion	0	Add new code
<input type="checkbox"/> cc.media.exclusion	0	Add new code
<input type="checkbox"/> Others	0	Add new code
<input type="checkbox"/> Others24	1	Foreign Language
<input type="checkbox"/> process.customer.exclusion	0	Add new code
<input type="checkbox"/> process.media.exclusion	0	Add new code
<input type="checkbox"/> Sale	0	Add new code
<input type="checkbox"/> schedule.callback	3	Callback,12121,new try
<input type="checkbox"/> System Defined	7	user forced,logged off,user transferred to,ivr,user transferred to,campaign,user transferre...
<input type="checkbox"/> telecom.issues	0	Add new code
<input type="checkbox"/> telecom.issues6	11	Agent volume too low,Voice breakage,Conference voice breakage,Conference disconn...

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.

9.3.2 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.

Disposition Plan		Disposition Class	Disposition Plan
Name	Enabled Code	Type	Code Assignment
<input type="checkbox"/> DefaultOVCDispositionPlan	20		user.forced.logged.off,user.transferred.to.iv...
<input type="checkbox"/> DefaultIVADispositionPlan	20		user.forced.logged.off,user.transferred.to.iv...
<input type="checkbox"/> DefaultVBKCDispositionPlan	20		user.forced.logged.off,user.transferred.to.iv...
<input type="checkbox"/> DefaultCCDispositionPlan	9		user.forced.logged.off,user.transferred.to.iv...
<input type="checkbox"/> DefaultIVRCDispositionPlan	20		user.forced.logged.off,user.transferred.to.iv...
<input type="checkbox"/> DefaultCSTACDispositionPlan	20		user.forced.logged.off,user.transferred.to.iv...
<input type="checkbox"/> DefaultAOVCDispositionPlan	20		user.forced.logged.off,user.transferred.to.iv...

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.

9.3.3 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.

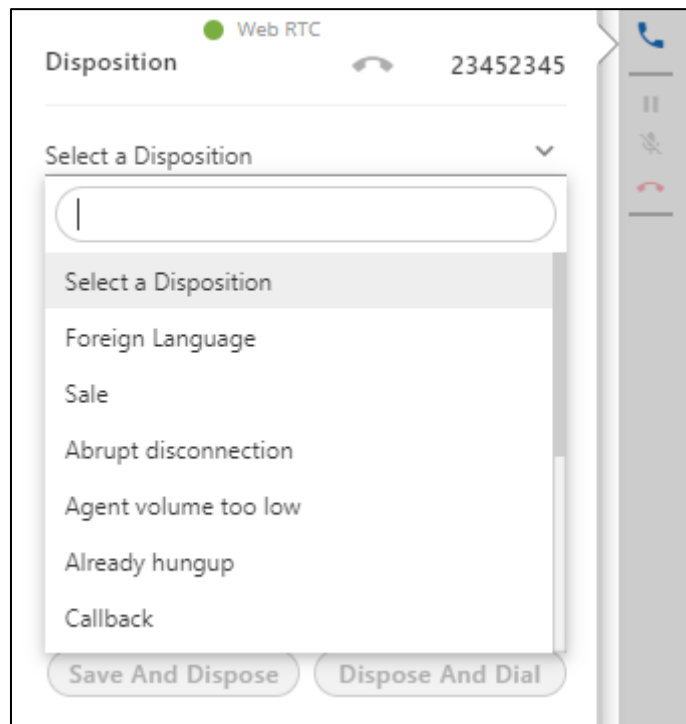


Figure: One Level Disposition

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.

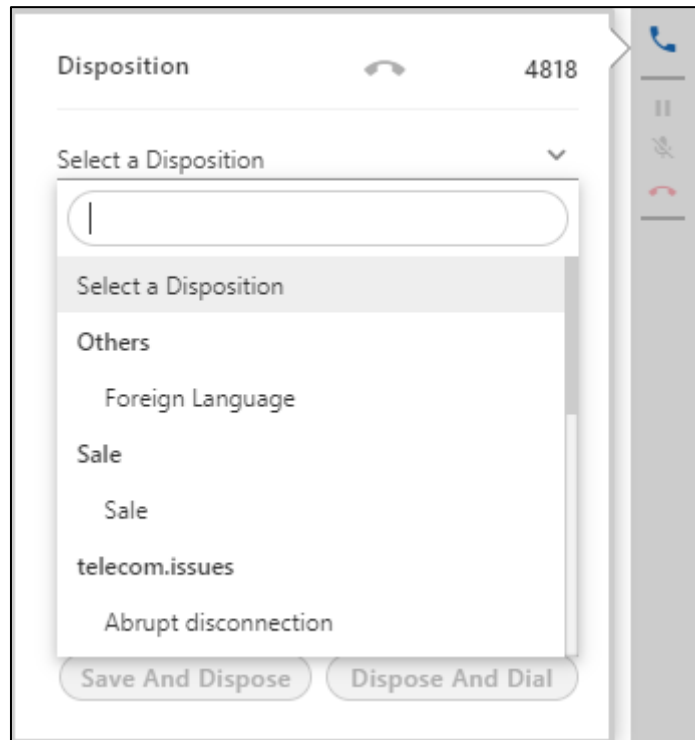


Figure: Two level Disposition Selection

9.3.3.1 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

3. Execute the following query to exit from the database.

```
\q
```

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

9.4 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.

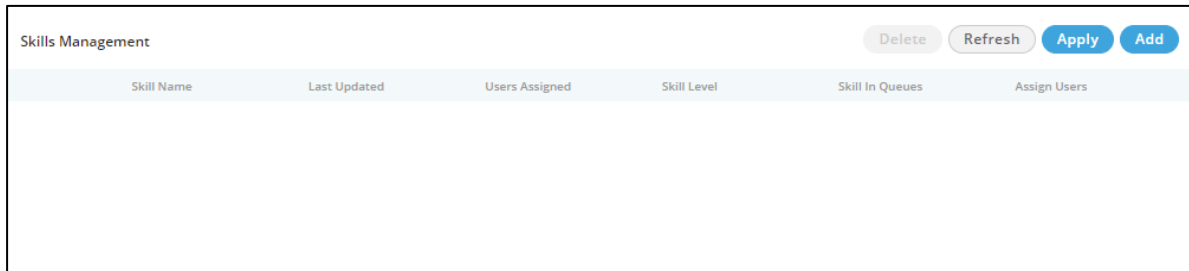


Figure: Skills Tab

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.

9.4.1 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.

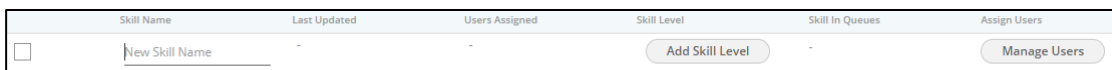


Figure: Adding a New Skill

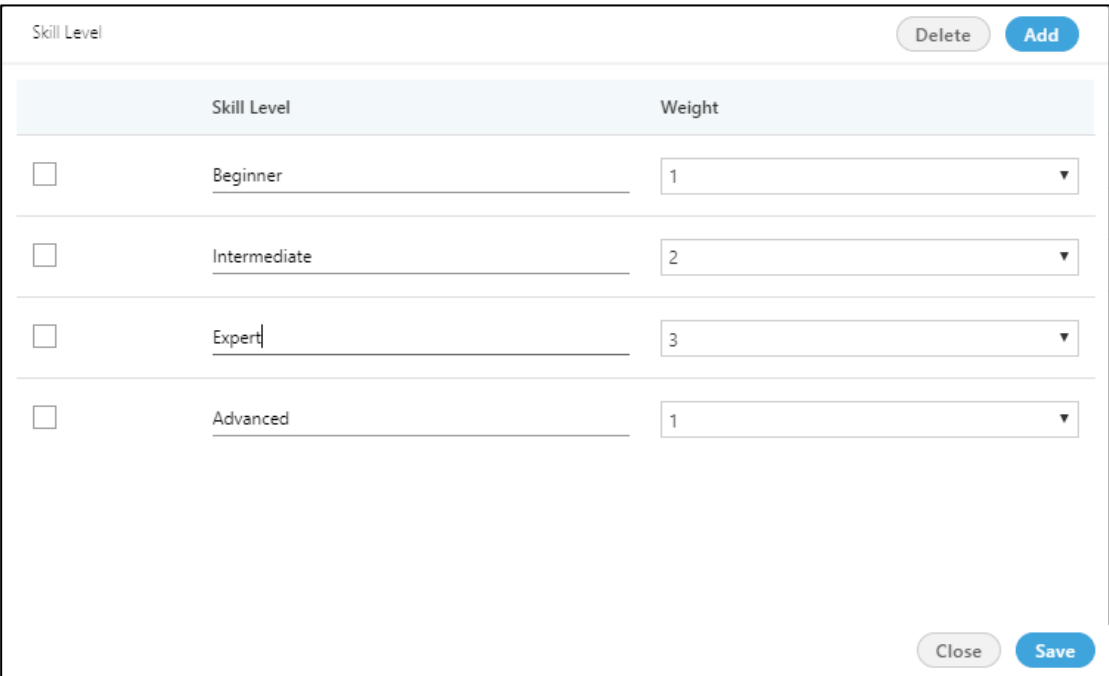
2. Enter Skill name and define skill levels by clicking "**Add Skill Level**". It shows the following pop-up.



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

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	Weight
<input type="checkbox"/>	Beginner	1
<input type="checkbox"/>	Intermediate	2
<input type="checkbox"/>	Expert	3
<input type="checkbox"/>	Advanced	1

Figure: Adding Skill Levels

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

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

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

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

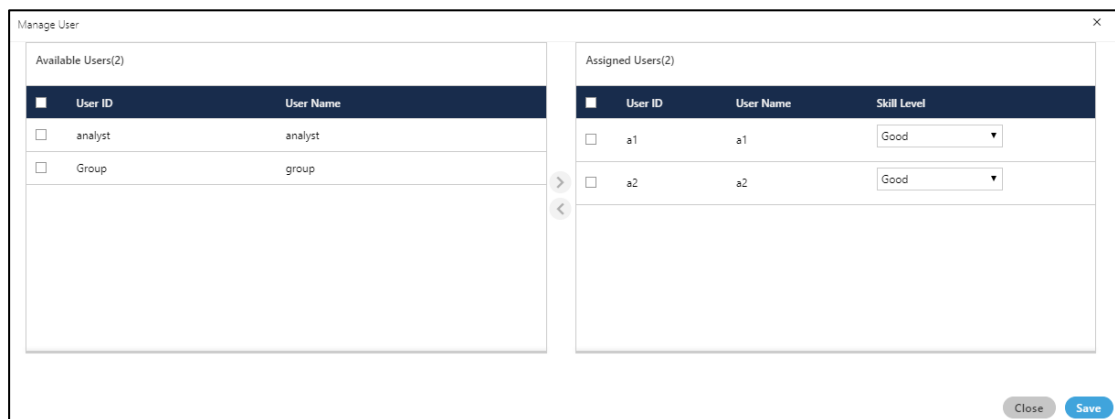


Figure: Manage Users

Perform the following steps here.

- A. Select the user from "**Available**" section.
- B. Click on ">" symbol to assign the user. If 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						
	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

- 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	
Queue Name	Campaign
Inbound_Hindi	TestInbound

[Close](#)
[Save](#)

Figure: List of Queues

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

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

9.4.2 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.

9.5 Exclusions

If Voice-Admin wants to exclude few numbers that should not be dialed in the system, then they can be uploaded in exclusion tab by adding leads.

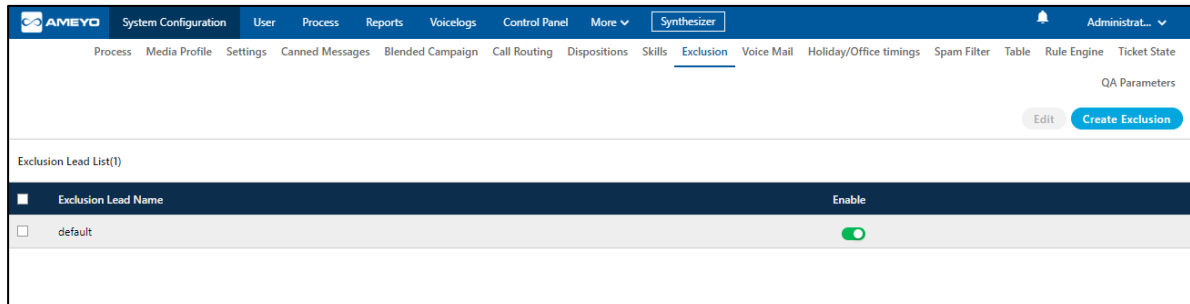


Figure: Exclusions Tab

9.5.1 Create an Exclusion List

Voice-Admin can perform the following steps to create an Exclusion List.

1. Click "Create Exclusion" to create a new exclusion lead. It shows the following pop-up.

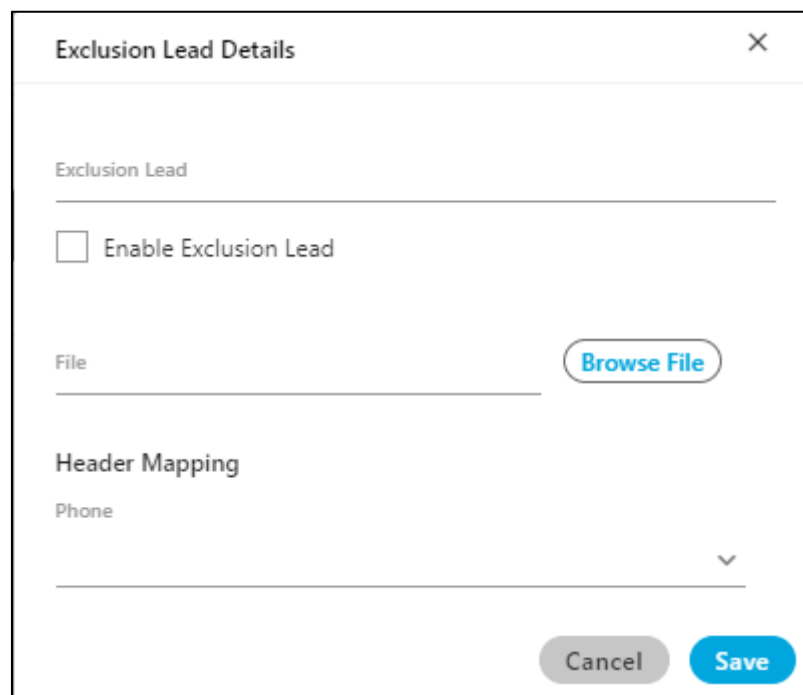
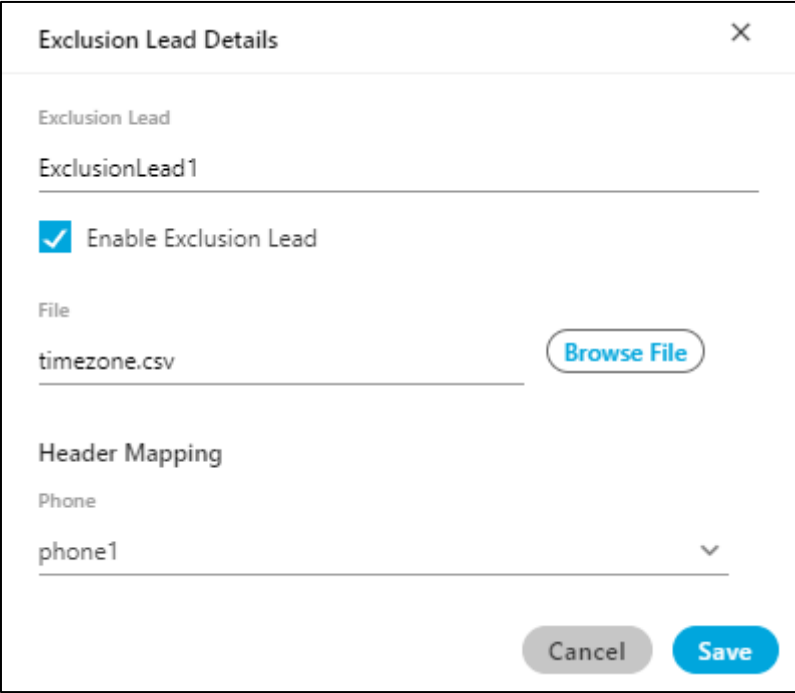


Figure: Exclusion Lead Detail

Here, you have to perform the following steps.

- A. In exclusion lead column, enter the name of the lead.
- B. Check "Enable Exclusion Lead" box to enable the new lead is created.
- C. Click "Browse 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.



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

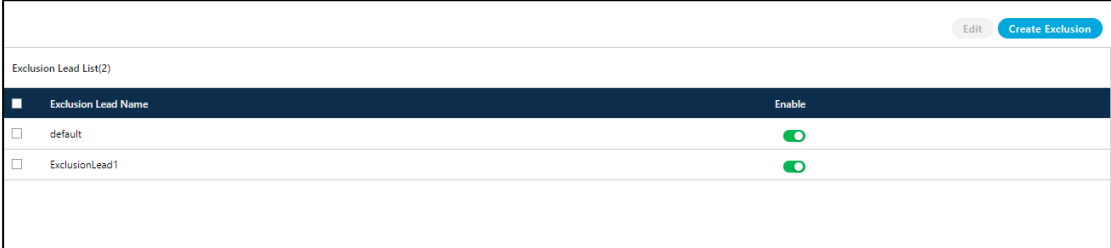
- Exclusion Lead:** A text input field containing "ExclusionLead1".
- Enable Exclusion Lead:** A checkbox that is checked.
- File:** A text input field containing "timezone.csv" and a "Browse File" button.
- Header Mapping:** A dropdown menu labeled "Phone" with "phone1" selected.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

Figure: Sample Exclusion Lead

- E. Click "Save" to save the changes.

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

2. After clicking "Save", it takes you back to the main page that shows the created exclusion list. You can create the multiple exclusion leads here.



Exclusion Lead Name	Enable
default	<input checked="" type="checkbox"/>
ExclusionLead1	<input checked="" type="checkbox"/>

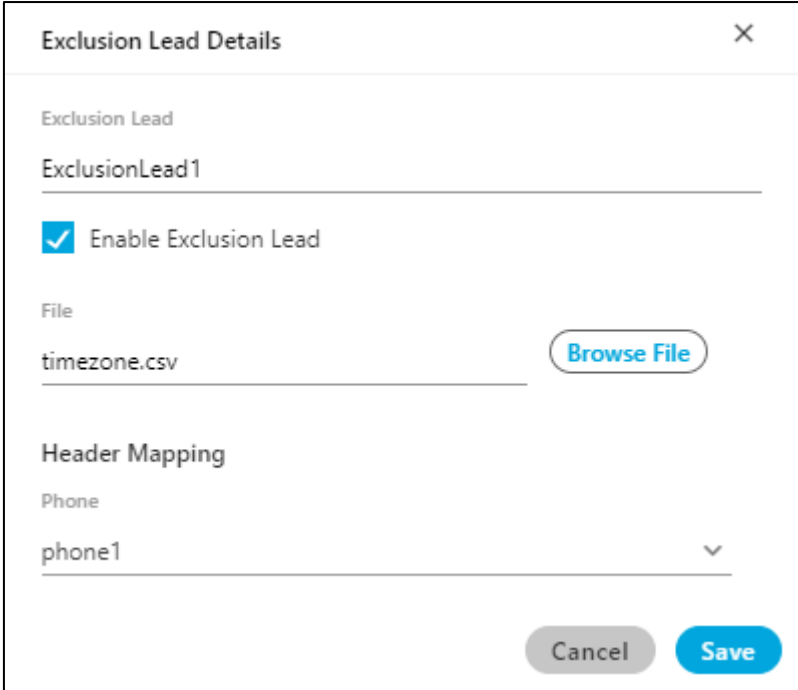
Figure: Exclusion Leads

9.5.2 Disable or Enable an Exclusion Lead List

Uncheck "Enable" box for any lead to disable it. You can check this box again to enable it.

9.5.3 Edit an Exclusion Lead List

Select the Exclusion Lead which you want to edit and click "Edit" button. The same pop-up is arrived which is arrived at the time adding the exclusion. You can change the exclusion name, file and header mapping on the opened pop-up.



Exclusion Lead Details

Exclusion Lead
ExclusionLead1

Enable Exclusion Lead

File
timezone.csv [Browse File](#)

Header Mapping
Phone
phone1

[Cancel](#) [Save](#)

Figure: Edit Exclusion Lead

9.5.4 Delete an Exclusion Lead List

The delete exclusion lead cannot be retrieved back. Also, it will not be applicable in the selected campaign.


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



Figure: Delete Exclusion Lead

9.6 Voice Mail (Licensed Feature)

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

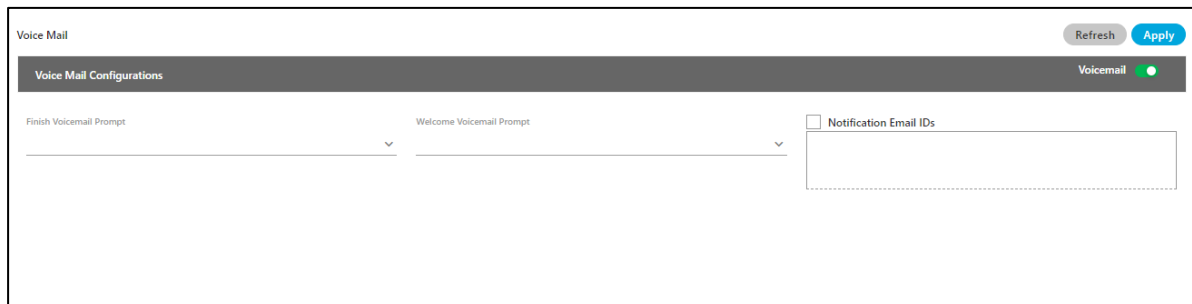


Figure: Voicemail

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.

9.7 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.

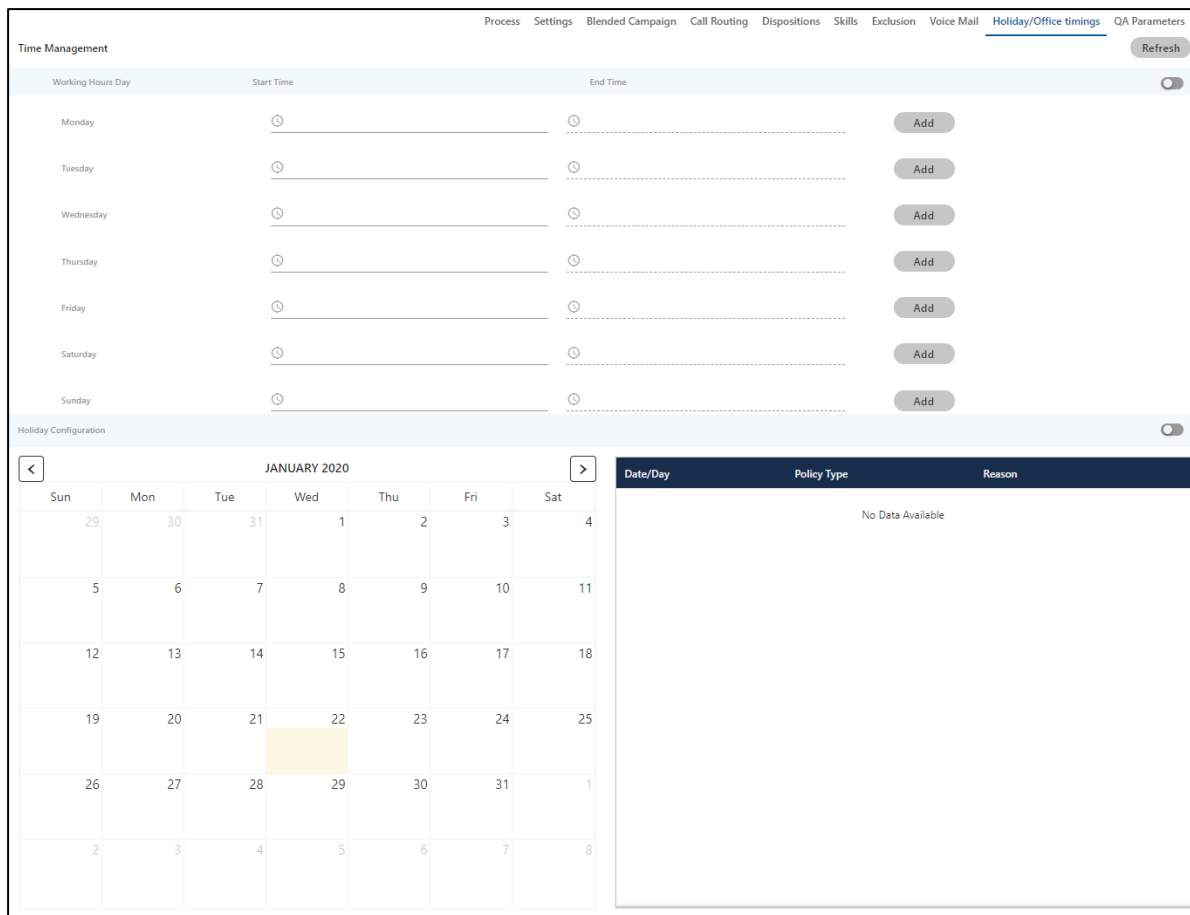


Figure: Holiday/Office Timings Tab

9.7.1 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	Time ⌚	Time ⌚	Add
Tuesday	Time ⌚	Time ⌚	Add
Wednesday	Time ⌚	Time ⌚	Add
Thursday	Time ⌚	Time ⌚	Add
Friday	Time ⌚	Time ⌚	Add
Saturday	Time ⌚	Time ⌚	Add
Sunday	Time ⌚	Time ⌚	Add

Figure: Define Working Hours

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

- 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.

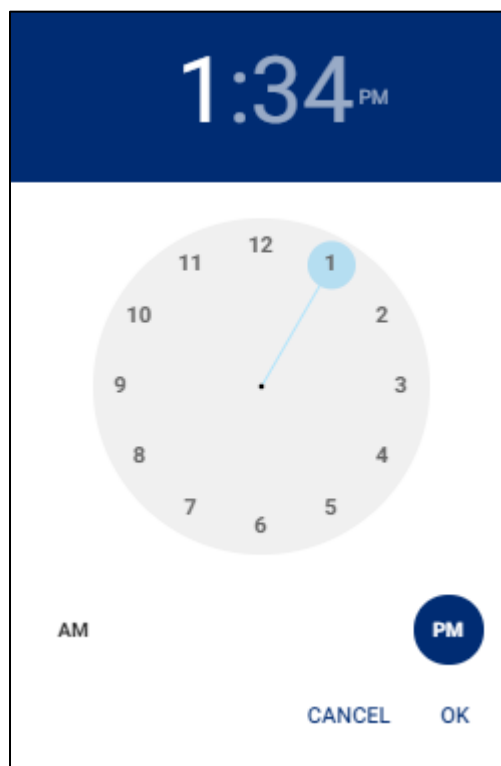


Figure: Select Time

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.

9.7.2 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.

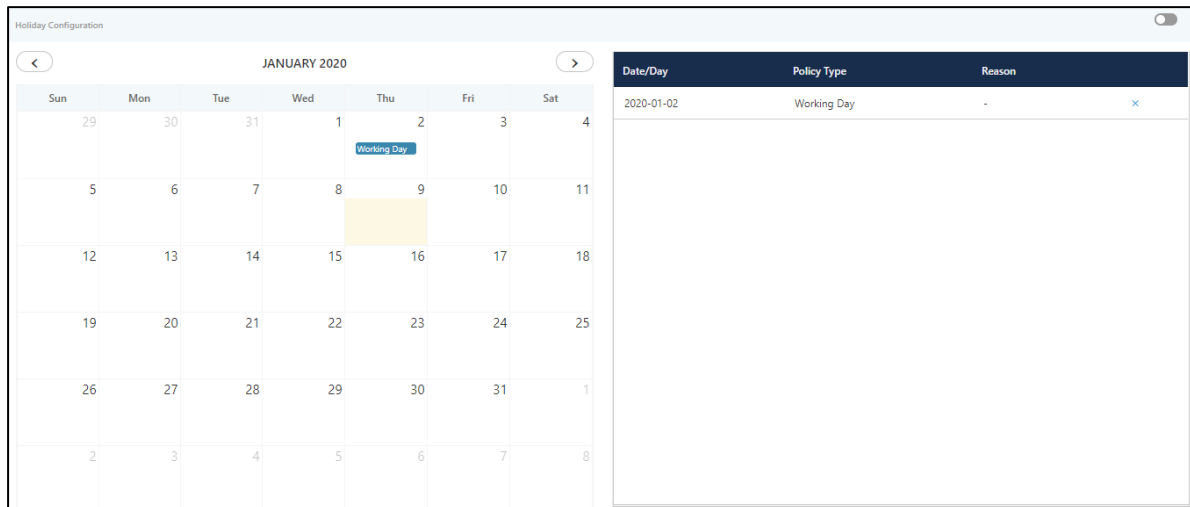


Figure: Holiday Configuration

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.

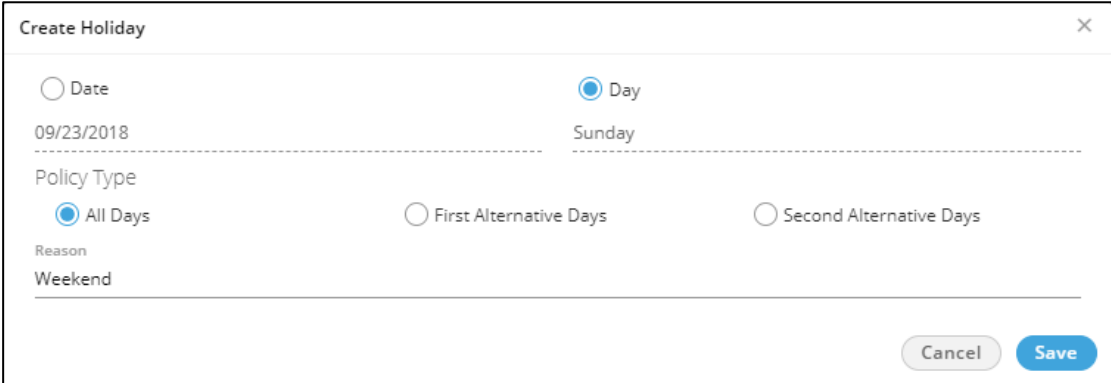
After selecting it, select any of the following options.

- **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.



The screenshot shows a 'Create Holiday' dialog box. It has a title bar with 'Create Holiday' and a close button 'X'. The dialog is divided into several sections. The first section is 'Date' with a radio button and the value '09/23/2018'. The second section is 'Day' with a radio button and the value 'Sunday'. The third section is 'Policy Type' with three radio buttons: 'All Days' (selected), 'First Alternative Days', and 'Second Alternative Days'. The fourth section is 'Reason' with the value 'Weekend'. At the bottom right are 'Cancel' and 'Save' buttons.

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.

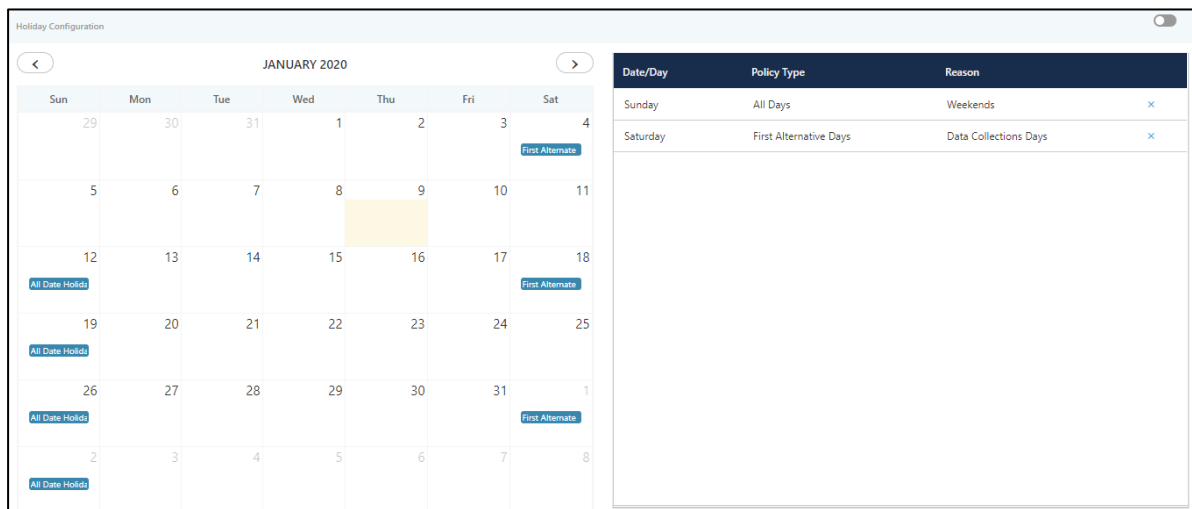


Figure: Created the holidays

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

10. Campaign Settings

"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](#)

10.1 Chat Campaign Settings

In the left navigation bar of Process Tab, you can select a Chat Campaign to view its settings.

The changes made in settings of one Chat Campaign will be applicable to that campaign itself. They will not be applicable on other similar (chat) and different (non-chat) campaigns.

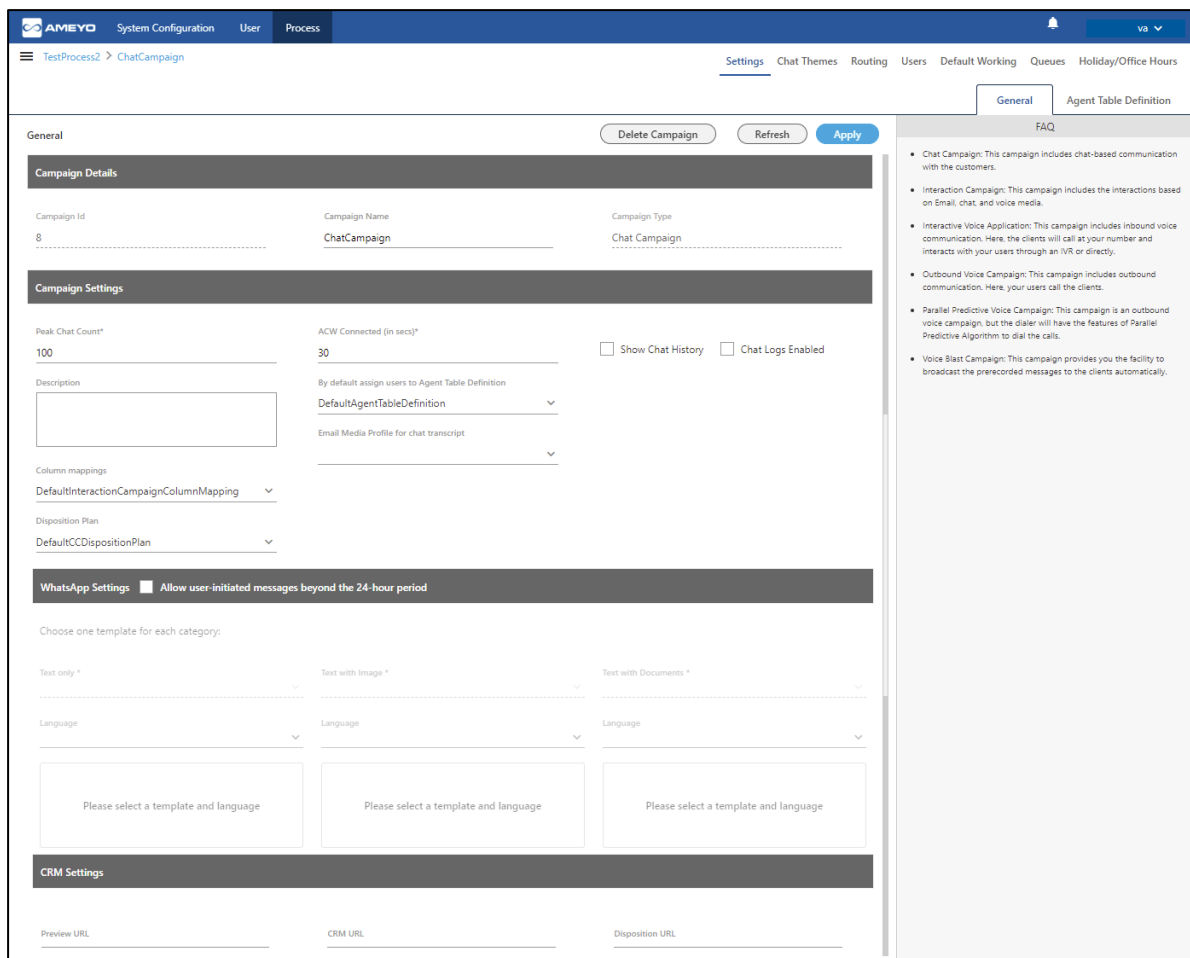


Figure: Settings of Chat Campaign

The proxy server with the chat (Ameyo WebChat or any other chat medium) can be used. The Voice-Admin has to configure the proxy server, named as nginx-based Proxy Support . After configuration, all the messages coming through Chat medium will first route from proxy server and then they will be received at Ameyo application server. For further information contact Ameyo Support team.

At the right side of the campaign settings page, some of the commonly asked definitions of settings are defined. You can refer to those definitions.

It contains the following tabs.

- Settings
- Queues
- Routing
- Chat Themes
- Users
- Default Working
- Holiday/Office Hours

10.1.1 Linking Chat Campaign with Interaction Campaign

You have to perform the following steps to link the Chat Campaign with Interaction Campaign. The tickets will not be created for any Chat Message, if it is not linked.

1. At the Linux-based Server where Ameyo is installed, execute the following command to enter the console of PostgreSQL.

```
psql -U postgresql
```

2. Execute the following command to access "ameyodb" database.

```
\c ameyodb
```

3. Execute the following command to link the Chat Campaign with an Interaction Campaign.

```
INSERT INTO server_preference_store  
(context_type, context_id, key, value) VALUES
```

```
('chatCampaignConfig','<chat_campaign_id>','interactionCampaignIds','<interaction_campaign_id>]');
```

You have to replace the "Chat_Campaign_ID" with the ID of the Chat Campaign and "Interaction_Campaign_ID" with the ID of the Interaction Campaign, which you want to link.

```
login as: root
Authorized uses only. All activity may be monitored and reported.
root@10.10.10.33's password:
Last login: Tue Oct 30 13:18:11 2018
[root@localhost ~]# psql -U postgres
psql (9.3.19)
Type "help" for help.

postgres=# \c ameyodb
You are now connected to database "ameyodb" as user "postgres".
ameyodb=#
ameyodb=# INSERT INTO server_preference_store (context_type,context_id,key,value)
VALUES ('chatCampaignConfig','9','interactionCampaignIds','[10]');
INSERT 0 1
ameyodb=# █
```

Figure: Commands to link Chat Campaign with Interaction Campaign

4. Now, execute the following command to exit from the database and PostgreSQL console.

```
\q
```

10.1.2 General Settings of Chat Campaign

This tab contains only "General Settings".

The screenshot displays the 'General' settings for a 'ChatCampaign'. The interface is organized into several sections:

- Campaign Details:** Includes fields for Campaign Id (8), Campaign Name (ChatCampaign), and Campaign Type (Chat Campaign).
- Campaign Settings:** Contains 'Peak Chat Count*' (100), 'ACW Connected (in secs)*' (30), and checkboxes for 'Show Chat History' and 'Chat Logs Enabled'. It also features dropdown menus for 'Description', 'By default assign users to Agent Table Definition' (DefaultAgentTableDefinition), 'Email Media Profile for chat transcript', and 'Column mappings' (DefaultInteractionCampaignColumnMapping).
- Disposition Plan:** A dropdown menu set to 'DefaultCCDispositionPlan'.
- WhatsApp Settings:** Includes a checkbox 'Allow user-initiated messages beyond the 24-hour period' and three template selection boxes, each with a 'Please select a template and language' prompt.
- CRM Settings:** Includes fields for 'Preview URL', 'CRM URL', and 'Disposition URL'.

Figure: General Settings for Chat Campaign

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

10.1.2.1 Campaign Details

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

10.1.2.1.1 Campaign Settings

It contains the following settings, which you have configured while creating a Chat Campaign. You can modify them here.

- Peak Chat Count
- ACW Connected (in secs)*
- Column Mappings

- Disposition Plan
- Description

In addition, it contains the following new settings that you can configure only while modifying an existing Chat Campaign.

- **By default assign users to Agent Table Definition:** Here, you can select the default Agent Table Definition for this campaign.
- **Email Media Profile for chat transcript:** Here, you can select the Email Media Profile through which the Chat Transcript of Ameyo Web Chat will be sent to that customer who have opted to send the Chat Transcript.
- **Show Chat History:** Select this option to to show the Historical Chat in the Ameyo Web Chat to both the customers and the agents.
- **Chat Logs Enabled:** Select this option to enable the logging of Chat.

10.1.2.2 WhatsApp Settings

WhatsApp Settings present of Chat Campaign helps to create and configure the templates for WhatsApp Outbound notifications. These configured notifications will be sent to the customers. The customer can reply to the received notification and then have a conversation with the agent. This feature helps the business to reply after the 24 hour, as the agent only get the 24 hour window in which the agent can reply.

The "Reply Via" feature is available for "WhatsApp for Business". However, WhatsApp for Business allows responding to messages (from the agent to the customer) within 24 hours of the last incoming message sent by the customer to the agent.

After that window of 24-hour, the WhatsApp for Business allows sending the template-based messages only, which may contain the text. It is a paid service.

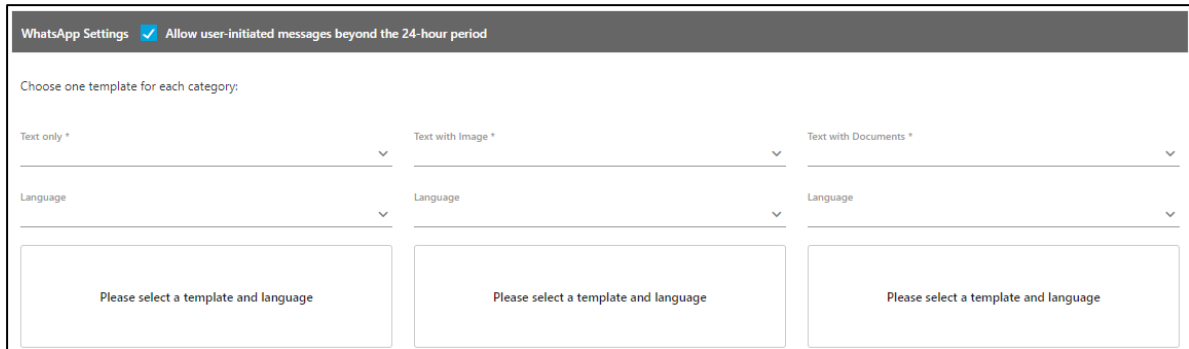


Figure: WhatsApp Settings of Chat Campaign

Perform the following steps

1. Enable WhatsApp Settings option, as these settings are not enabled by-default.
2. Select the text from the drop-down list. It is the configured notification that has been configured from backend. The Voice-Admin can select the notification that has been configured with image or document.
3. Select the language from the language drop-down.
4. Save the settings.

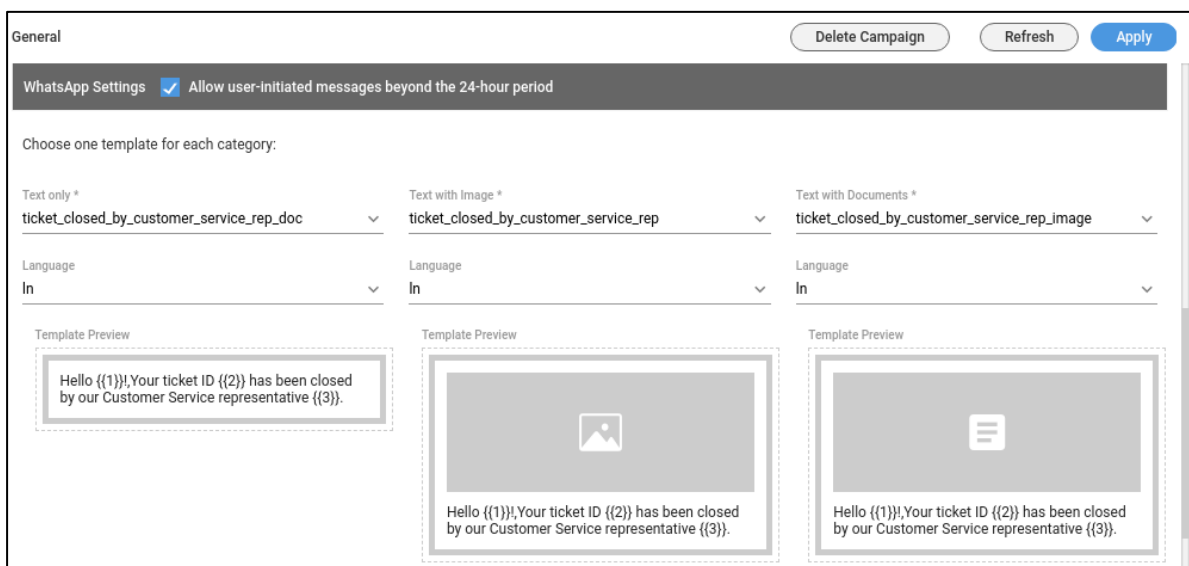


Figure: Configured WhatsApp Settings Sample

The Voice-admin can select "text" type template to send the text messages, "image" type template to send the images (only in png and jpeg), and "doc" type template to send the documents in PDF format only.

10.1.2.3 CRM Settings

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

[Click here](#) to know more about the Campaign Details and CRM Settings for this campaign. After modifying the settings, click "Apply" on top to apply these settings. Else, you can click "Refresh" to discard the changes.

10.1.3 Chat Themes

This tab has already been explained in the Process Settings. [Know more...](#)

10.1.4 Holiday/Office Hours

This tab has already been explained in "System Configuration". [Know more...](#)

10.1.5 Queue Management in Chat Campaign

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

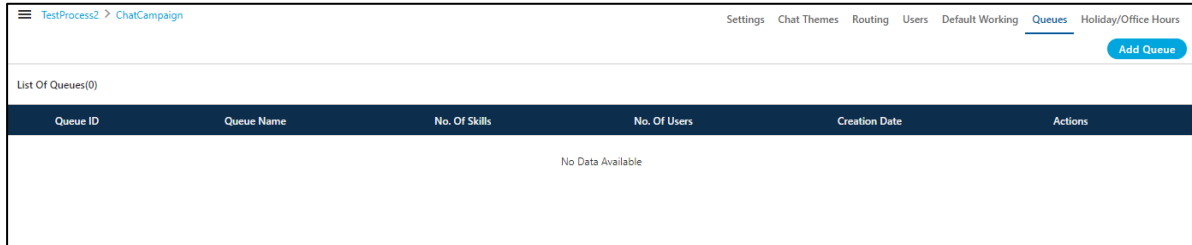


Figure: Queues Tab

10.1.5.1 Create Queue

Perform the following steps to create a queue.

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

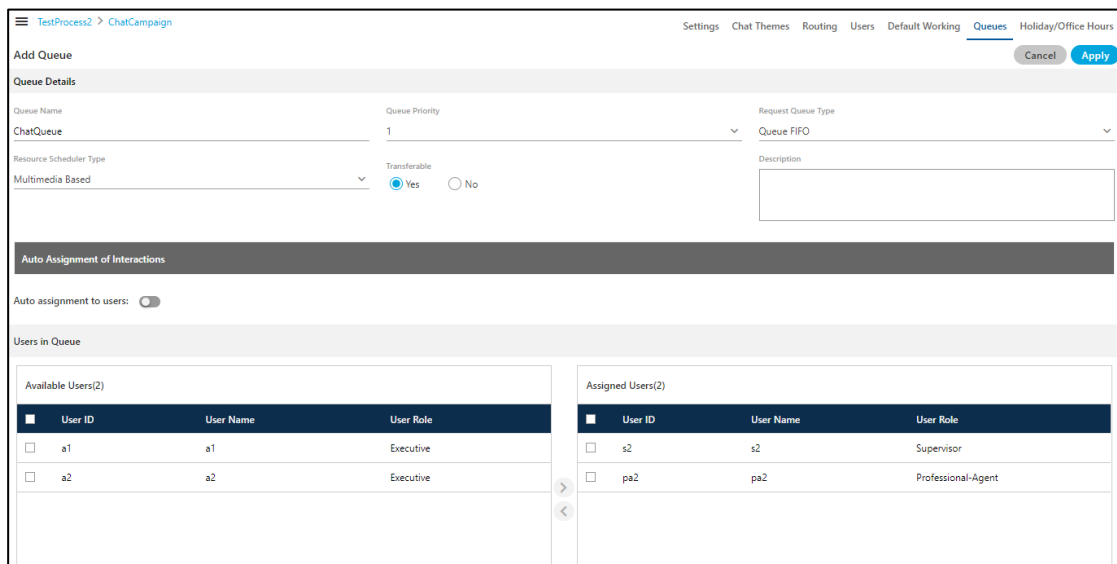


Figure: Create Queue

2. Provide a name for the queue.


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

Example:

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

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

- C. **Answer:** In such a scenario, Agent1 will be connected first with "Customer1" as its queue - Queue1 - has higher priority.
5. **Resource Scheduler Type (Licensable):** It will let you decide which agent would be connected to the customer when two agents are available to take the chat or call. Select any of the following options.

- A. **Multiple Extension:** Select it if the agents have multiple extensions and they are supposed to attend multiple communications (chat or call) simultaneously. One agent can be connected to two customers in the same queue.
 - B. **Skill Based:**Select it to connect the communication (chat or call) to that agent who has more skill level than others.
6. **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 from the "Available Users" section and click  icon.

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

Add Queue

Queue Details

Queue Name: ChatQueue | Queue Priority: 1 | Request Queue Type: Queue FIFO

Resource Scheduler Type: Multimedia Based | Transferable: Yes No

Description: [Empty text area]

Auto Assignment of Interactions

Auto assignment to users:

Users in Queue

Available Users(2)			Assigned Users(2)		
User ID	User Name	User Role	User ID	User Name	User Role
<input type="checkbox"/> a1	a1	Executive	<input type="checkbox"/> s2	s2	Supervisor
<input type="checkbox"/> a2	a2	Executive	<input type="checkbox"/> pa2	pa2	Professional-Agent

Figure: Sample Details to create a Queue

9. Click "Apply" to create the queue.

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

You can create multiple queues using these steps.

Queue ID	Queue Name	No. Of Users	Creation Date	Actions
39	chat_1	7	Fri Jun 19 15:59:21 GMT+05:30 2020	Edit
40	chat-2	4	Fri Jun 19 15:59:39 GMT+05:30 2020	Edit

Figure: List of Queues

10.1.5.2 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.

Queue Details

Queue Name: ChatQueue | Queue Priority: 1 | Request Queue Type: Queue FIFO

Resource Scheduler Type: Multimedia Based | Transferable: Yes No

Auto Assignment of Interactions

Auto assignment to users:

Users in Queue

Available Users(2)			Assigned Users(2)		
User ID	User Name	User Role	User ID	User Name	User Role
<input type="checkbox"/> a1	a1	Executive	<input type="checkbox"/> s2	s2	Supervisor
<input type="checkbox"/> a2	a2	Executive	<input type="checkbox"/> pa2	pa2	Professional-Agent

Figure: Edit the Queue

10.1.5.3 Delete Queue

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



Figure: Delete Queue

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

10.1.6 User Management in Campaign

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

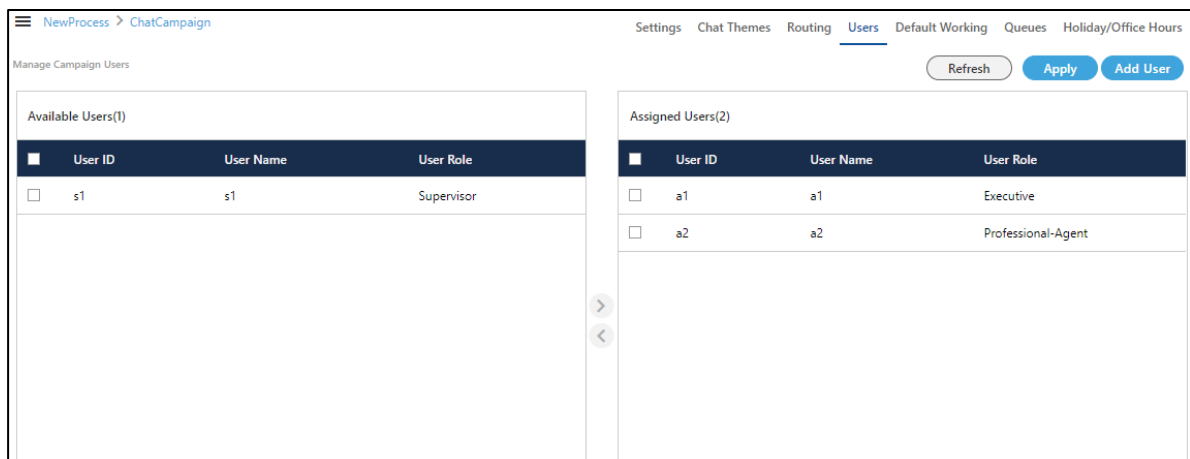



Figure: User Management

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

Perform the following steps.

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

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

2. Click  icon to add the selected users.

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

10.1.7 Chat Campaign Routing

Routing Tab lets you create the nodeflows to manage the routing of communication (chat, call, or email) in a campaign.

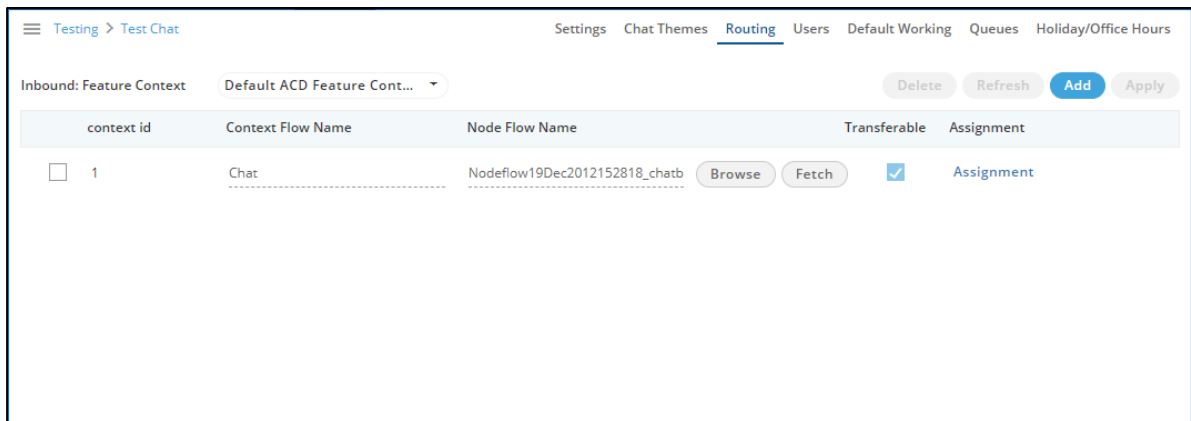


Figure: Routing Management

10.1.7.1 Add a Nodeflow for Routing

Perform the following steps to create a nodeflow.

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

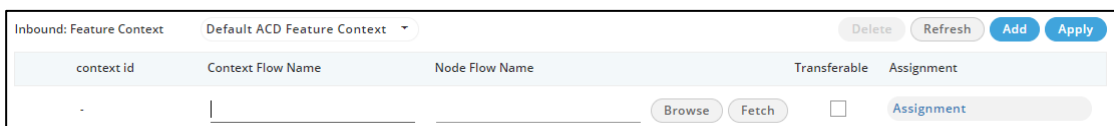


Figure: Add Context Flow

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

Service Engineer will provide you the required nodeflow files.

Click "Browse" to open a nodeflow file. Select the location where the file stored.

Select the required file and click "Open".

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

5. Click "Apply" to add the nodeflow.

10.1.7.2 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.

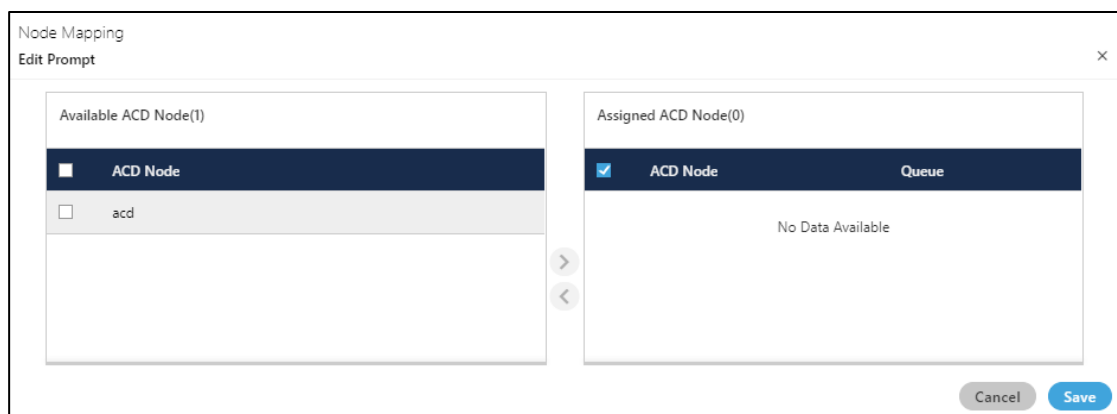



Figure: Assign Nodeflow to a Queue

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.
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.

The screenshot shows the 'Routing' configuration page in Ameyo. At the top, there are navigation tabs: 'Settings', 'Chat Themes', 'Routing' (selected), 'Users', 'Default Working', 'Queues', and 'Holiday/Office Hours'. Below the tabs, there's a breadcrumb 'Testing > Test Chat' and a dropdown menu for 'Inbound: Feature Context' set to 'Default ACD Feature Context'. On the right, there are buttons for 'Delete', 'Refresh', 'Add', and 'Apply'. The main content is a table with the following data:

context id	Context Flow Name	Node Flow Name	Transferable	Assignment
<input type="checkbox"/> 1	Chat	Nodeflow19Dec2012152818_chatbot	<input checked="" type="checkbox"/>	acd
<input type="checkbox"/> 4	Chat3	Nodeflow19Dec2012152818_chatbot	<input checked="" type="checkbox"/>	acd
<input type="checkbox"/> 3	Chat2	Nodeflow19Dec2012152818_chatbot	<input type="checkbox"/>	acd

Figure: Added Nodeflows

10.1.7.3 Edit Routing

Select the routing which you want to edit. After selecting it, the user can change the "Context Flow name," change the "Node Flow" and assignment of queues in it.

After editing the details, click "Apply" button to save the changes made.

10.1.7.4 Delete Routing

Select the Routing which you want to delete and click "Delete" button. A confirmation pop-up is arised.



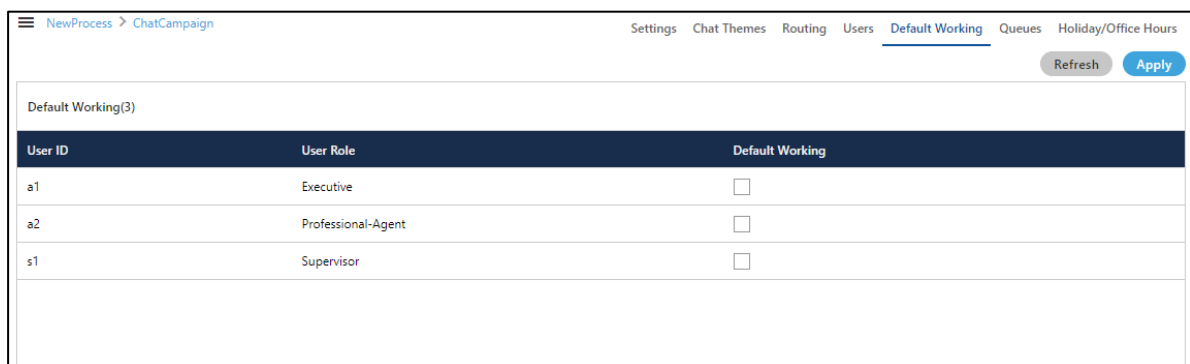
Figure: Confirmation pop-up

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

10.1.8 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.



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.

10.1.9 Agent Table Definition in Campaign Settings

The Agent Table Definitions created in a Process will be applicable and available, by default, in all campaigns of that Process. A new tab "Agent Table Definition" has been added in the settings of Interaction Campaign, Chat Campaign, Inbound Campaign, Outbound Campaign, and Parallel Predictive Dialing Campaign. You can select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition.

Agent Table Definition is not available for Voice Blast Campaign.

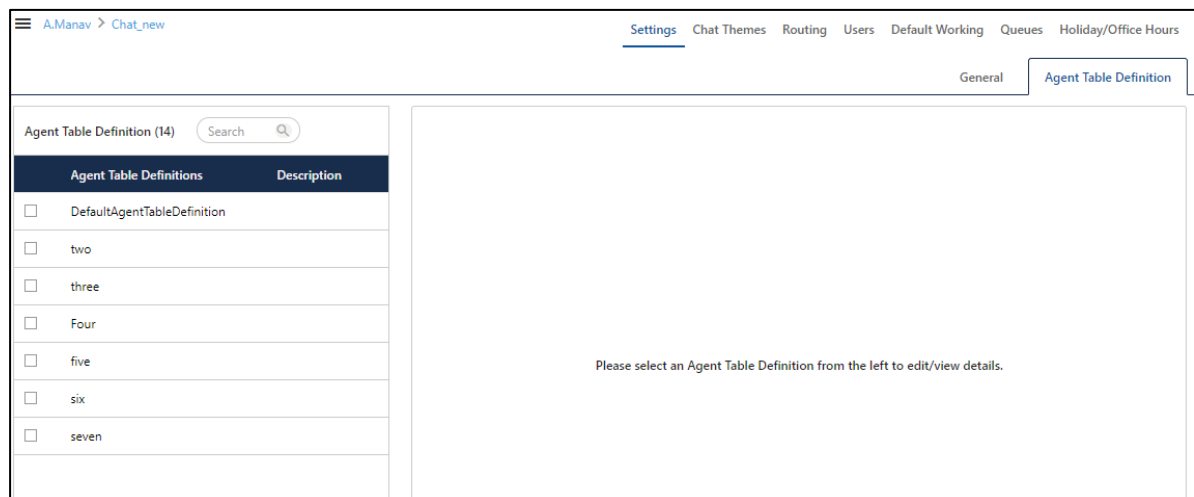


Figure: "Agent Table Definition" tab in the Settings of an Interaction Campaign

The Agent Table Definitions available in this Process are listed in the left section. You can select only one Agent Table Definition to view the options to assign the selected users to this Agent Table Definition in the right section.

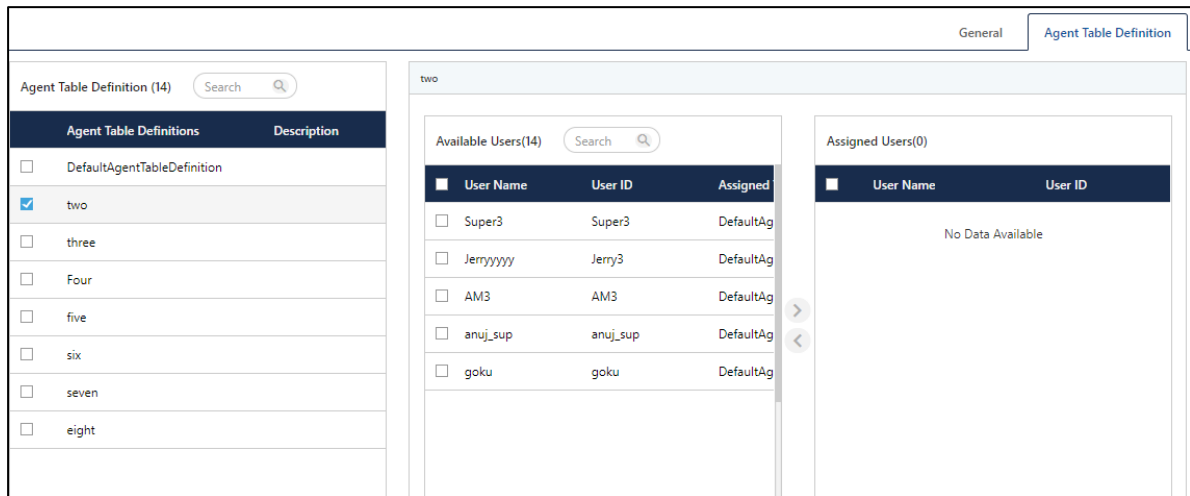




Figure: Assign or Unassign Users to Agent Table Definition

You can select the users in "Available Users" section and click  icon to select the users and move them to "Assigned Users" section.

To unassign users from the Agent Table Definition, select the users in "Assigned Users" section and click  icon to unassign the users.

Click "Save" to assign the users to the selected Agent Table Definition.

If the selected users are already assigned to the different Agent Table Definition, then the following warning message is displayed on the screen.

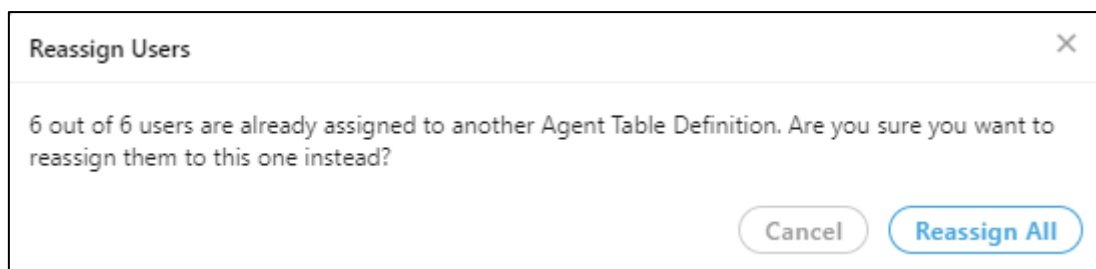


Figure: Warning Message

A user can be assigned to only one Agent Table Definition. If you want to reassign the users to this new Agent Table Definition, click "Reassign All" button. Else, click "Cancel" button.

If a new agent is assigned to a Campaign, then it will be assigned to the default Agent Table Definition of that campaign until the Voice-Admin modifies it manually.

10.2 Interaction Campaign Settings

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

The changes made in settings of one Interaction Campaign will be applicable to that campaign itself. They will not be applicable on other similar (interaction) and different (non-interaction) campaigns.

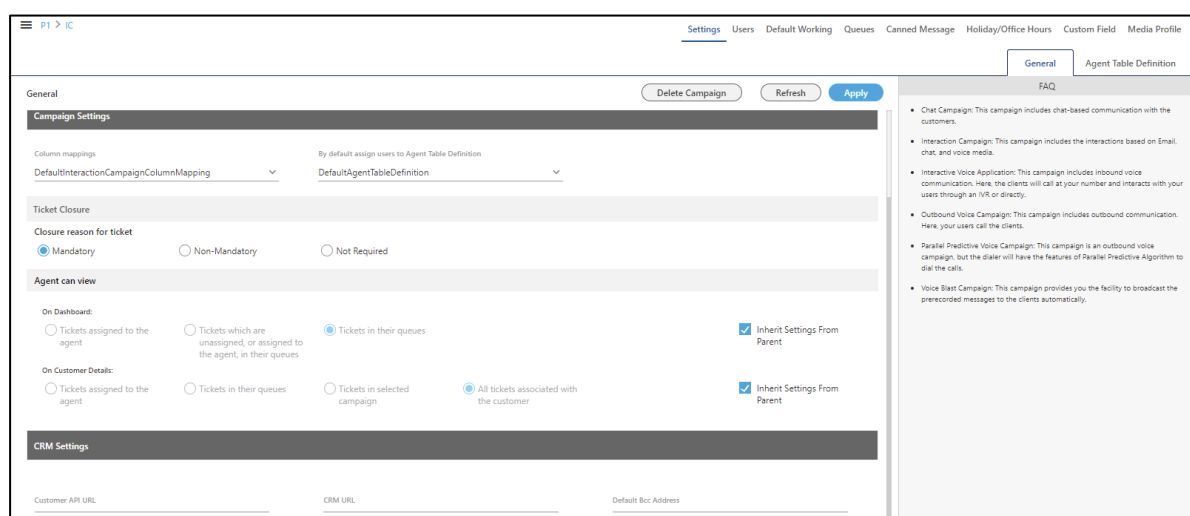


Figure: Settings of Interaction Campaign

At the right side of the campaign settings page, some of the commonly asked definitions of settings are defined. You can refer to those definitions.

The proxy server with the Email based services can be used. The administrator has to configure the proxy server, named as nginx-based Proxy Support . For further information contact Ameyo Support team.

It contains the following tabs.

- Settings → General
- Settings → Agent Table Definition
- Queues

- Users
- Default Working
- Holiday/Office Hours
- Canned Messages
- Custom Field
- Media Profile

10.2.1 General Settings of Interaction Campaign

This tab contains only "General Settings", which are divided into the following sections.

10.2.1.1 Campaign Details

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

10.2.1.2 Campaign Settings

It contains the following settings.

10.2.1.2.1 Agent can view

This setting lets you allow the agents to view the tickets of others or not.

- **On Dashboard:** It lets you allow or disallow the agents to view the tickets of other agents on the dashboard. You can check "Inherit from Parent" to inherit this setting from the parent. If you uncheck it, then you can select any of the following values for this campaign.

- Tickets assigned to the agent: Select it to let the agent view only those tickets that are assigned to the agent.
 - Tickets assigned to the agent and all unassigned tickets: Select it to let the agent view all unassigned tickets and those tickets that are assigned to the agent.
 - All Tickets: Select it to let the agent view all tickets such as assigned tickets to the agent itself, unassigned tickets, and tickets assigned to other agents.
- **On Customer Details**: It lets you allow or disallow the agents to view the tickets of other agents on the customer details. You can check "Inherit from Parent" to inherit this setting from the parent. If you uncheck it, then you can select any of the following values for this campaign.
 - Tickets assigned to the agent: Select it to let the agent view only those tickets that are assigned to the agent.
 - Tickets assigned to the agent and all unassigned tickets: Select it to let the agent view all unassigned tickets and those tickets that are assigned to the agent.
 - All Tickets: Select it to let the agent view all tickets such as assigned tickets to the agent itself, unassigned tickets, and tickets assigned to other agents.

10.2.1.2.2 Closure Reason of Tickets

It is a new setting named "Closure Reason for ticket", which allows the Voice-Admin to specify whether the users have to provide the closure reason while closing the ticket or not. It contains the following values.

- **Mandatory:** Select it to make it mandatory for the users to provide a closure reason while closing the ticket.
- **Non-Mandatory:** Select it to make it optional for the users to provide a closure reason while closing the ticket. The agent can skip the step to provide the closure reason and close the ticket directly.
- **Not Required:** Select it to make it unnecessary (not required at all) for the users to provide a closure reason while closing the ticket. The option to ask for a closure reason will not appear at all while closing any ticket.

10.2.1.2.3 Column Mappings

Select a different column mapping here.

10.2.1.2.4 By default assign users to Agent Table Definition

Here, you can select the default Agent Table Definition for this campaign.

10.2.1.2.5 CRM Settings

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

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

10.2.1.2.6 Default BCC Address

You can provide an email address to which all emails will be sent through BCC field.

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

10.2.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the Chat Campaign Settings. [Know more...](#)

We recommend that Ameyo Users such as Professional Agent, Execute, and Supervisor should select only one Interaction Campaign during and after their logon. Selecting Multiple Interaction Campaigns can create some issues. The option to select Multiple Interaction Campaigns have been removed already in the later versions of Ameyo AppServer. Therefore, we recommend the Voice-Admin to assign the unique users to an Interaction Campaign so that one user is assigned to only one Interaction Campaign.

10.2.2.1 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...](#)

10.2.3 Queues

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

10.2.4 Default Working

Here, you can select the users who will be logged in to this campaign, by default, and will not receive the prompt to select the campaign. This tab has already been explained in the Chat Campaign Settings. [Know more...](#)

10.2.5 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...](#)

10.2.6 Canned Messages

This Tab lets you assign and unassign the canned messages to this campaign. You have created the canned messages at the System Level and the same will be shown here. Refer to ["Canned Messages" in System Configuration](#) to know the steps to create the canned messages.

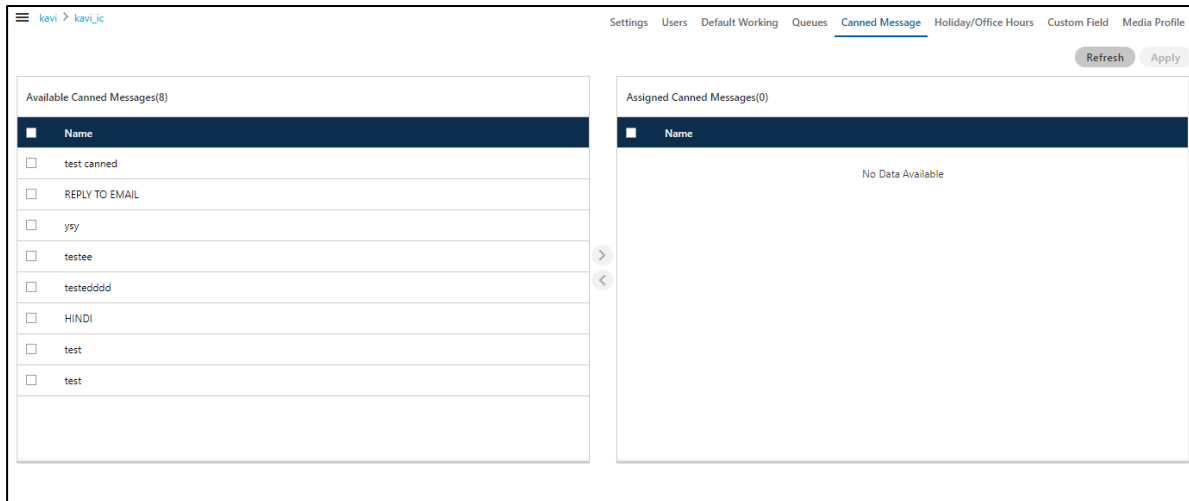



Figure: Canned Messages

Perform the following steps to assign canned messages to this campaign.

1. Select the canned messages in "Available Canned Messages" section
2. Click  icon to proceed to assign the selected canned messages.

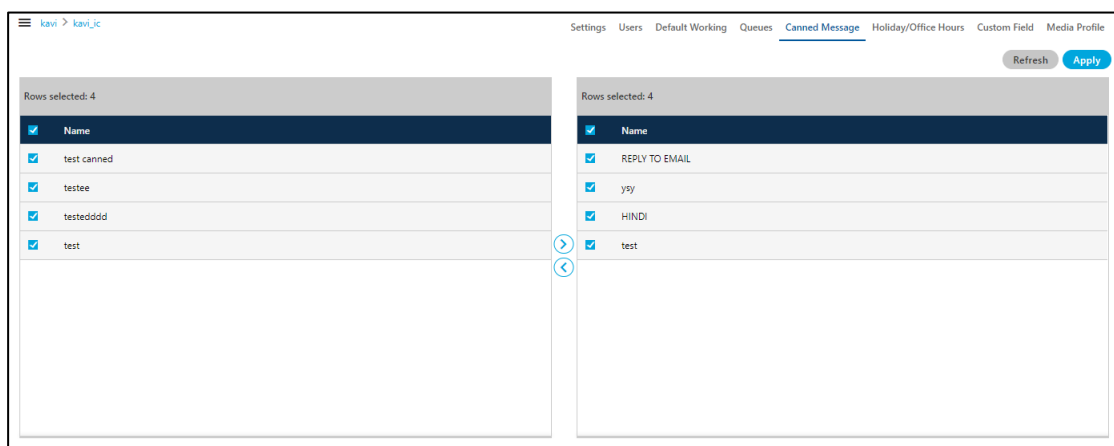



Figure: Assign or Unassign Canned Messages

3. Click "Apply" to assign the canned messages to this campaign.

Rather, you can click "Refresh" to not assign the canned messages.

To unassign a canned message, select it in "Assigned Canned Messages" section, click  icon, and click "Apply" to unassign the selected canned message from the campaign.

10.2.7 Custom Fields

This Tab lets you assign and unassign the custom fields to this campaign. You have created the Custom Fields in the Process Settings and the same will be shown here. Refer to ["Custom Fields" in Process Settings](#) to know more.

10.2.8 Media Profile

This Tab lets you assign and unassign the media profiles to this campaign, which the administrator has created the Media Profiles at the System Level and the same will be shown here. Refer to ["Media Profiles" in System Configuration](#) to know the steps to create the media profiles.

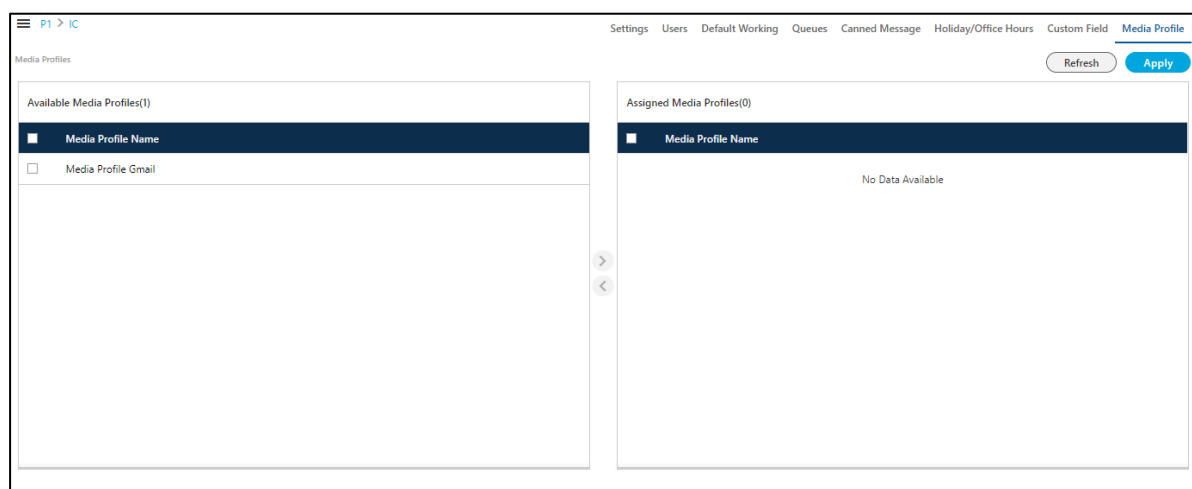



Figure: Media Profile

Perform the following steps to assign media profiles to this campaign.

1. Select the canned messages in "Available Media Profiles" section

2. Click  icon to proceed to assign the selected media profiles.

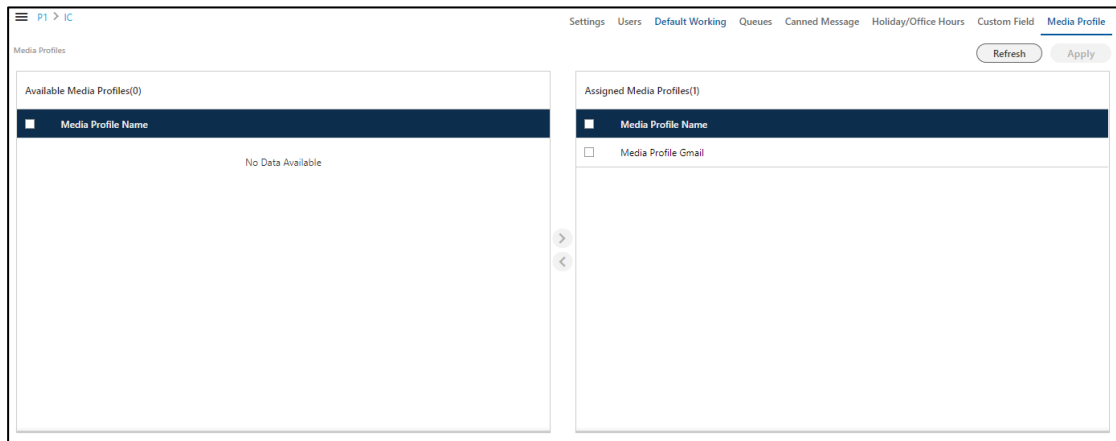



Figure: Assign or Unassign Media Profiles

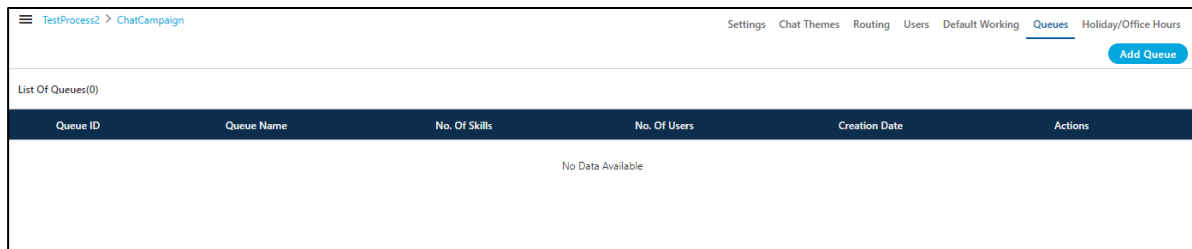
3. Click "Apply" to assign the Media Profiles to this campaign.

Rather, you can click "Refresh" to not assign the media profiles.

To unassign a media profile, select it in "Assigned Media Profiles" section, click  icon, and click "Apply" to unassign the selected media profile from the campaign.

10.2.9 Queue Management in Interaction Campaign

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



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

Figure: Queues Tab

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

10.2.9.1 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.

The screenshot shows the 'Add Queue' configuration page. The 'Queue Details' section contains the following fields:

- Queue Name: (empty)
- Queue Priority: 1
- Request Queue Type: Queue FIFO
- Resource Scheduler Type: Most Free Instance
- Transferable: Yes No
- Description: (empty text area)

Below the details is the 'Auto Assignment of Interactions' section with a toggle for 'Auto assignment to users'.

The 'Users in Queue' section contains two tables:

Available Users(3)		
User ID	User Name	User Role
<input type="checkbox"/> pa1	pa1	Professional-Agent
<input type="checkbox"/> pa2	pa2	Professional-Agent
<input type="checkbox"/> s2	s2	Supervisor

Assigned Users(0)		
User ID	User Name	User Role
No Data Available		

Figure: Create Queue


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

Example:

Question: If customer1 (who reached earlier) is waiting in Queue1 having priority 1 and customer2 (who reached late) is waiting in the Queue2 having

priority 2, and if only one agent is serving both queues, then what will happen? Let us go through the following table.

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

- C. **Answer:** In such a scenario, Agent1 will be connected first with "Customer1" as its queue - Queue1 - has higher priority.
5. **Resource Scheduler Type (Licensable):** It will let you decide which agent would be connected to the customer when two agents are available to take the interaction.
 - A. **Most Free Instance:** Select it to assign the tickets to the Agent who is free and is not working on any of the present ticket. This will help to assign the Ticket to the most free Agent at that time.
 6. **Transferable:** Select it to transfer the interaction from this new queue to another queue..
 7. Provide a description for the queue.
 8. **Auto Assignment to users:** It means to assign the IC media Tickets to the Agents automatically. To assign the Tickets to the Agents, toggle the switch. TO disable this feature and to assign the Tickets to the Agents manually, toggle this switch again.
 9. **Assign Users in Queue:** Select the users from the "Available Users" section and click  icon.

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

Figure: Sample Details to create a Queue

10. Click "Apply" to create the queue.

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

You can create multiple queues using these steps.

Queue ID	Queue Name	No. Of Users	Creation Date	Actions
39	chat_1	7	Fri Jun 19 15:59:21 GMT+05:30 2020	Edit
40	chat-2	4	Fri Jun 19 15:59:39 GMT+05:30 2020	Edit

Figure: List of Queues

10.2.9.2 Edit Queue

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

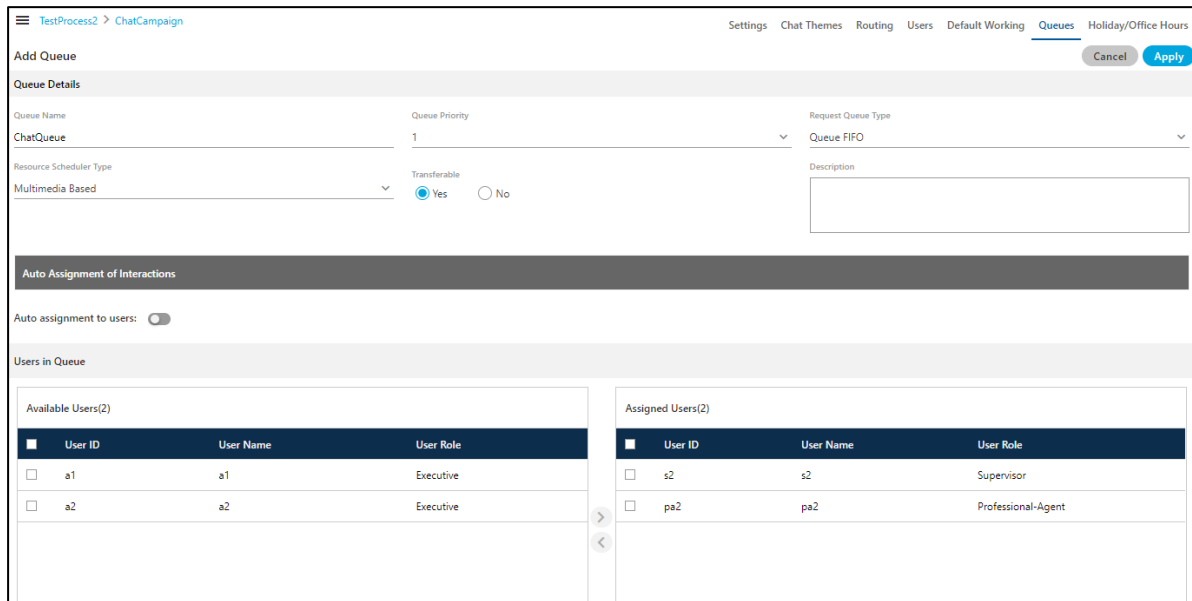


Figure: Edit the Queue

10.2.9.3 Delete Queue

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



Figure: Delete Queue

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

10.2.10 Custom Fields

This Tab lets you assign and unassign the custom fields to this campaign. You have created the Custom Fields in the Process Settings and the same will be shown here. Refer to "[Custom Fields](#)" in [Process Settings](#) to know the steps to create the custom fields.

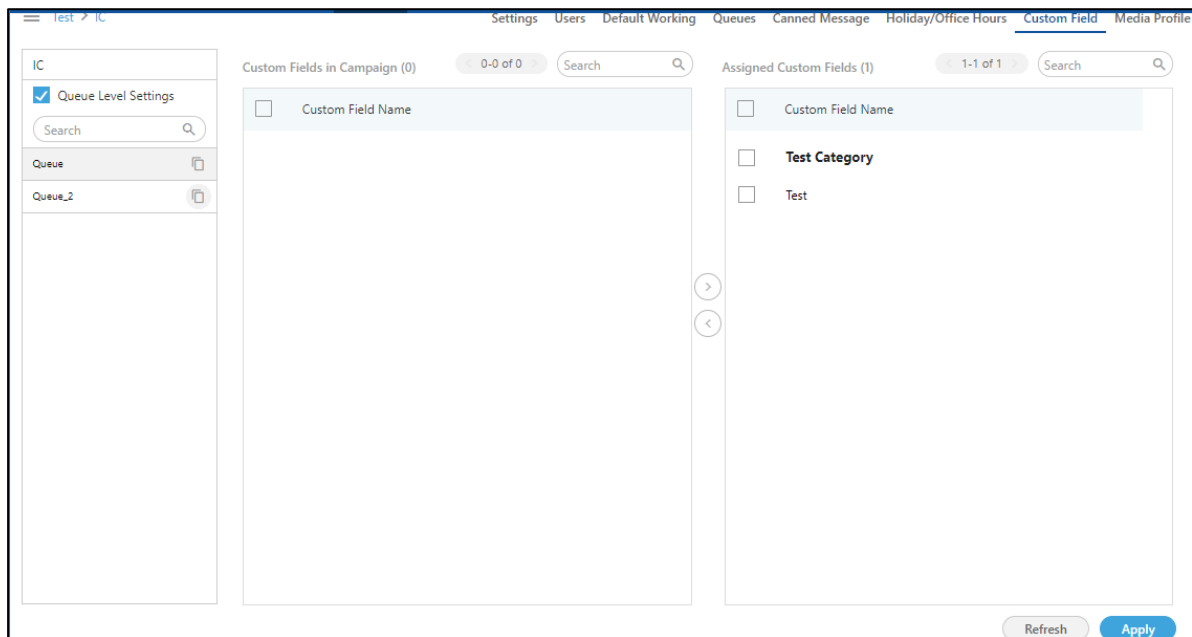



Figure: Custom Fields

10.2.10.1 Campaign Level Custom Fields

Perform the following steps to assign custom fields to the campaign.

1. Create the Queue in the Interaction Campaign first. [Know more...](#)
2. Switch the tab to Custom Fields of IC Campaign.
3. All the Custom Fields created at the process level are shown in the "Available Custom Field Section.
4. Select the Custom Fields which you want to assign in the campaign.
5. Click  icon to assign the selected custom fields.

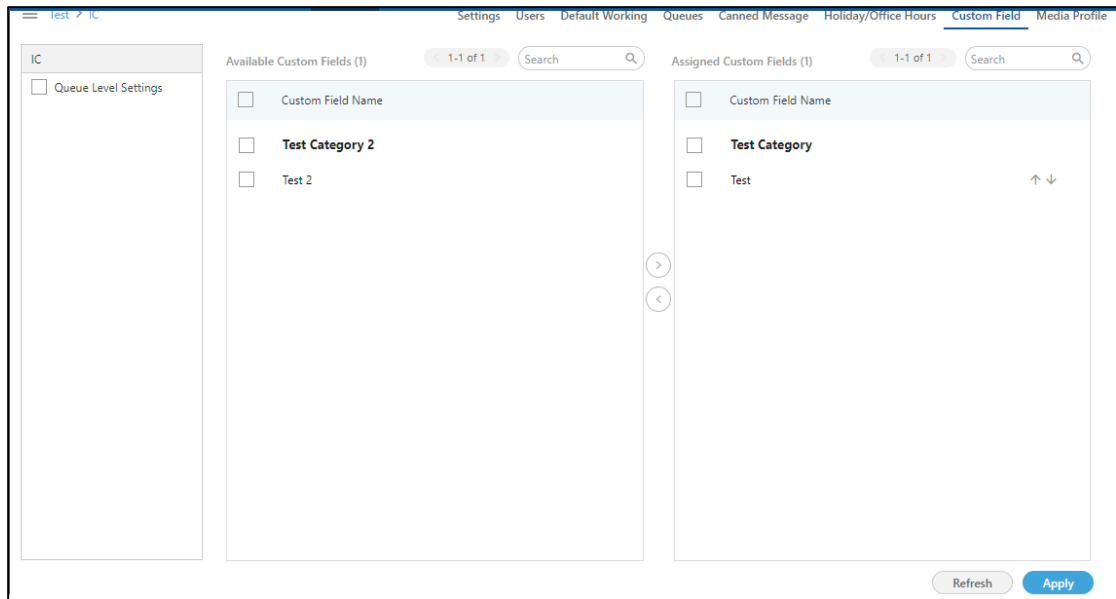



Figure: Assign or Unassign Custom Fields on campaign


6. Click "Apply" to assign the custom fields to this campaign. Rather, you can click "Refresh" to not assign the custom fields.
7. You can change priority of the custom fields in the assigned column of the custom fields. Click  icon to change the priority of the assigned custom fields.

To unassign a custom field, select it in "Assigned Custom Fields" section, click  icon, and click "Apply" to unassign the selected custom field from the campaign.

10.2.10.2 Queue Level Custom Fields

Perform the following steps to assign the custom fields to the particular queue.

1. Enable the "Queue Level Settings" check-box present in the left bar of the page.
2. After enabling the settings, all the queues which are created in the Campaign start showing in the list.
3. Click on the queue on which you want to assign the custom fields. The same page to assign the custom fields comes up.
4. All the Custom Fields created at the process level are shown in the "Available Custom Field Section."

- Select the Custom Fields which you want to assign in the queue.
- Click  icon to assign the selected custom fields.

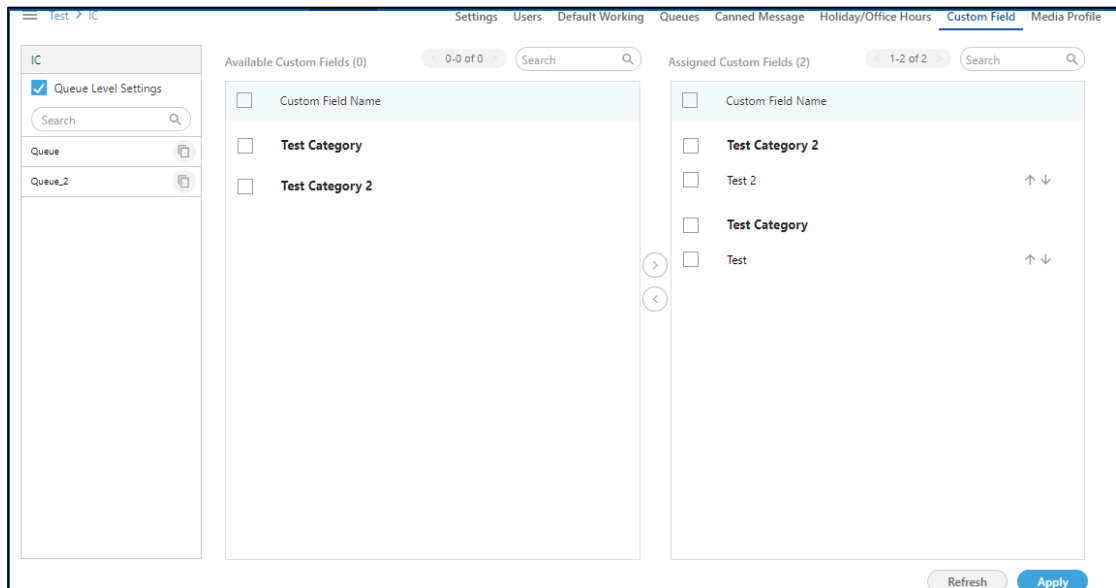



Figure: Assign or Unassign Custom Fields on queue

Perform the same steps to assign the custom fields to other queues.

10.2.10.3 Copy settings to other Queues

If all the custom fields assigned to one queue is same for the other queue, then you can copy all the settings to other queue with one-click. It allows the Voice-Admin to copy all the settings to one to another.

Perform the following steps.

- Click  icon present adjacent to the queue name. A new pop-up arises.

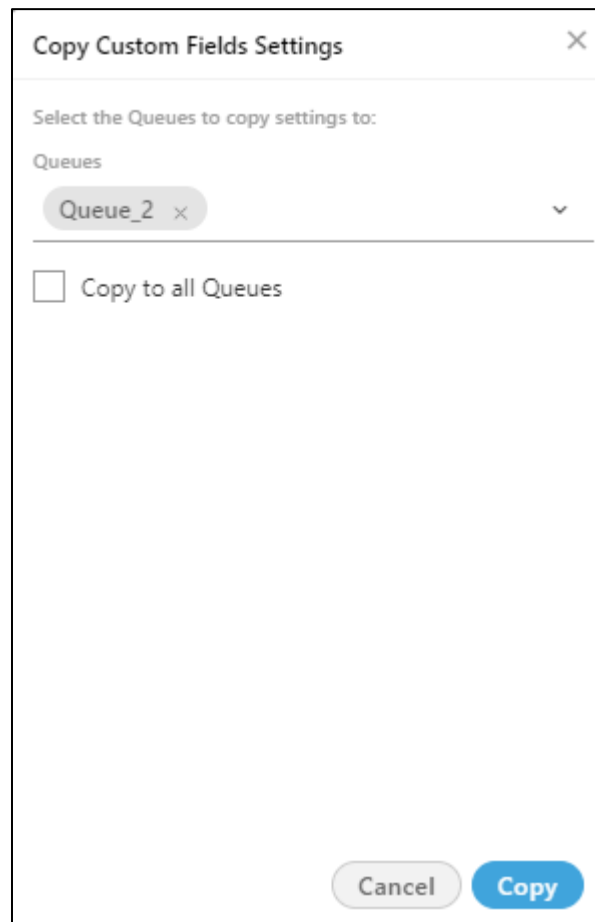


Figure: Copy settings

2. Select the queue in which you want to change the settings.
3. Enable the "Copy to all Queues" check-box if you want to copy the settings to all the existing queues of the campaign.
4. Click "Copy" button to proceed with the copying action. A pop-up for the confirmation comes up.

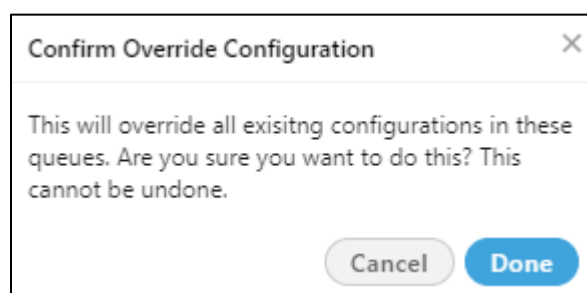


Figure: Confirm the copy process

- Click "Done" on the arrived pop-up to confirm the copy process else click "Cancel" button to undone the process.

The copy process will override all the settings to the new queue and the previous settings of that queue cannot be retrieved in any manner.

10.2.10.4 Hiding Custom Field at Queue Level

The Voice-Admin is able to hide some of the custom fields at queue level which are not useful for the organization.

```
INSERT INTO ic_configuration_parameter
(contact_center_id,name,value) VALUES
('<Contact_center_Id>','queueCustomFieldHideSetting','{"<Queue_ID_1>
":["Field_Name"],"<Queue_ID_2>":["<Field_Name>"],"<Queue_ID_3>":["<F
ield_Name>"]}')
```

```
ameyodb=# insert into ic_configuration_parameter (contact_center_id,name,value) values('1','crmUrlParametersConfig',{'userId':'userId','sessionId':'sessionId','customerId':'customerId','emailId':'emailId','phoneNumber':'phone','campaignId':'campaignId','crtObjectId':'crtObjectId','userCrtObjectId':'userCrtObjectId'})
INSERT 0 1
ameyodb=# select * from ic_configuration_parameter where name ilike '%crmUrlP%';
 id | contact_center_id | name | date_added | date_modified | value
-----+-----+-----+-----+-----+-----
  6 | 1 | crmUrlParametersConfig | 2019-07-22 17:34:42.317771 | 2019-07-22 17:34:42.317771 | {"campaignId", "crtObjectId":"crtObjectId", "userCrtObjectId":"userCrtObjectId"}
(1 row)
ameyodb=#
```

Figure: Hiding Custom Field Parameters

In the above query, provide the queue id and the fields according to the need. You can hide more custom fields at queue level at the same time. Provide all the custom fields according to the queues.

10.3 Interactive Voice Application Campaign Settings

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

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

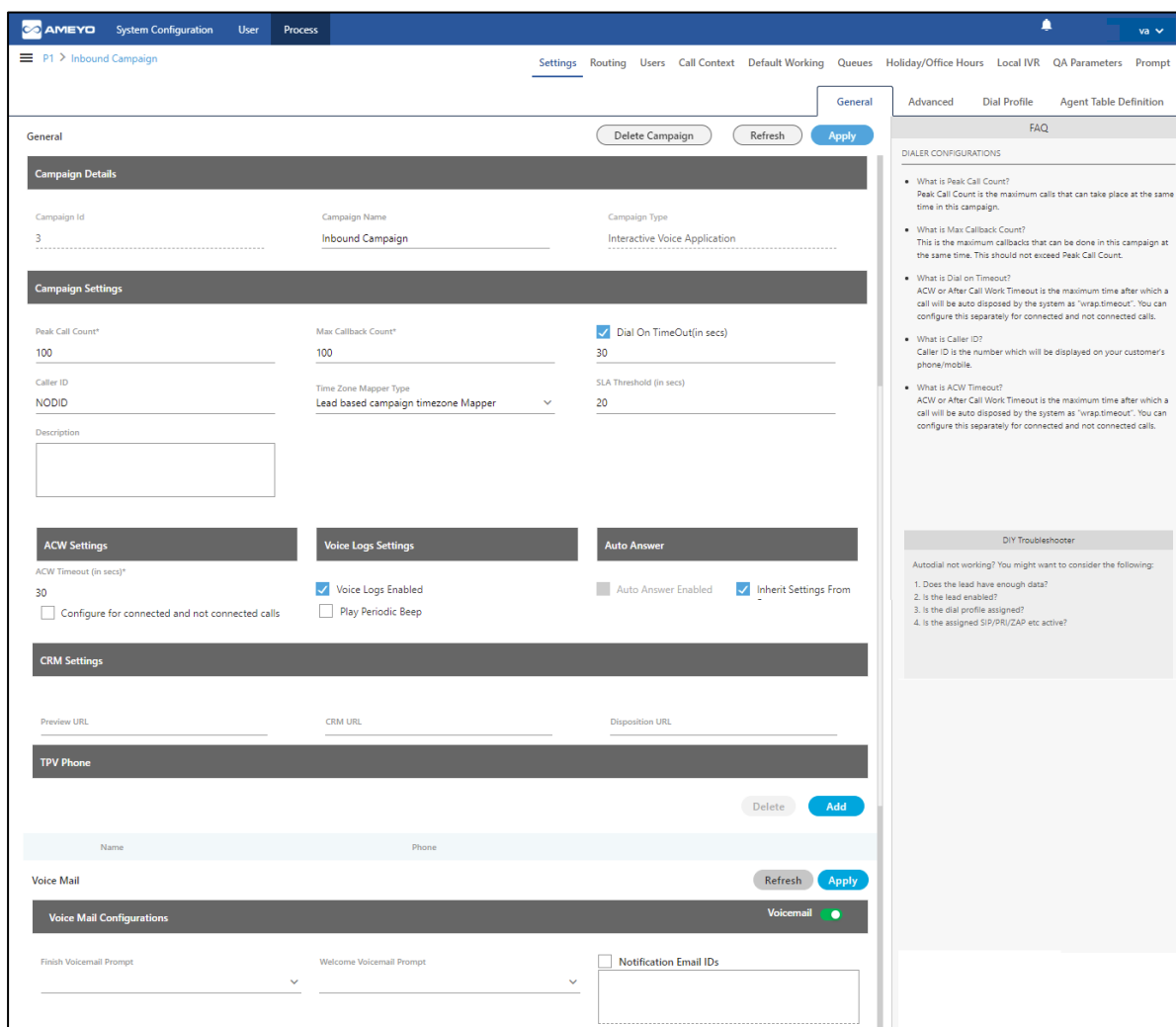


Figure: Settings of Interactive Voice Application Campaign

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

10.3.1 Settings Tab

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

10.3.1.1 General Settings

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

10.3.1.1.1 Campaign Details

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

10.3.1.1.2 Campaign Settings

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

- **Dial On Time out (In seconds):** Select it to define the dial on time-out. With these settings, the dialed calls will be disconnected after the provided seconds if not connected.
- **SLA Threshold (In Sec):** Here, you can specify the threshold in which the inbound calls should be answered ideally.
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- **Auto Answer Settings:** Auto-Answer Feature is already available for WebRTC with or without Ameyo SIP Agent Proxy. This feature did not require the implementation of "Accept-Reject" node in the Nodeflow to show the prompt at Ameyo User Console before answering the call.

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

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

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

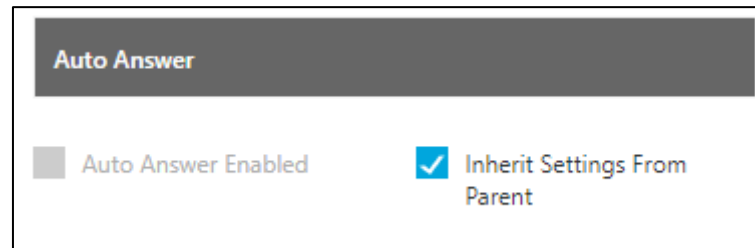


Figure: Auto-Answer Enabled

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

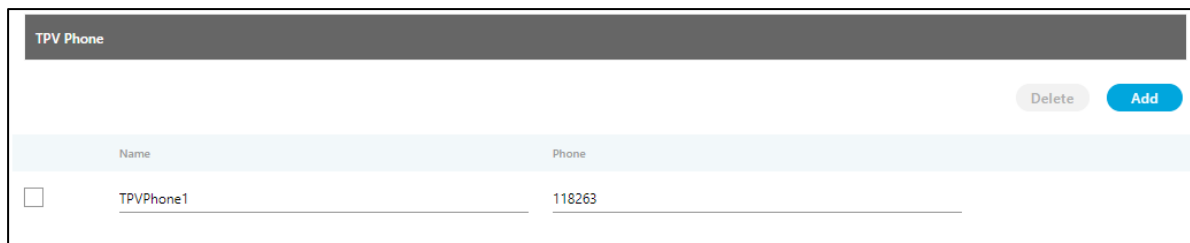
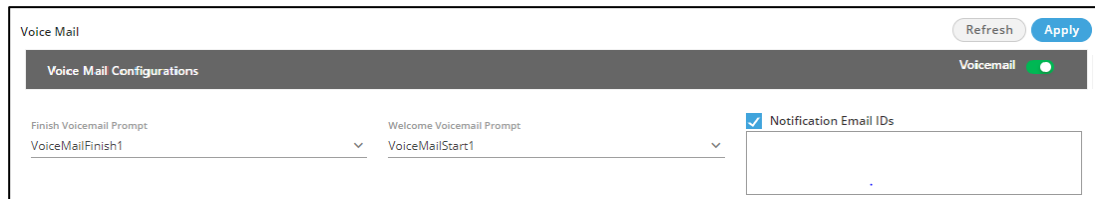


Figure: TPV Phone

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

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

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



The screenshot displays the 'Voice Mail Configurations' section of a web interface. At the top right, there are 'Refresh' and 'Apply' buttons. Below the title bar, the 'Voicemail' status is shown as active with a green dot. The configuration area contains two dropdown menus: 'Finish Voicemail Prompt' with the value 'VoiceMailFinish1' and 'Welcome Voicemail Prompt' with the value 'VoiceMailStart1'. To the right, the 'Notification Email IDs' checkbox is checked. A text input field is present below the checkbox, currently empty.

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.

10.3.1.2 Advanced Settings

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

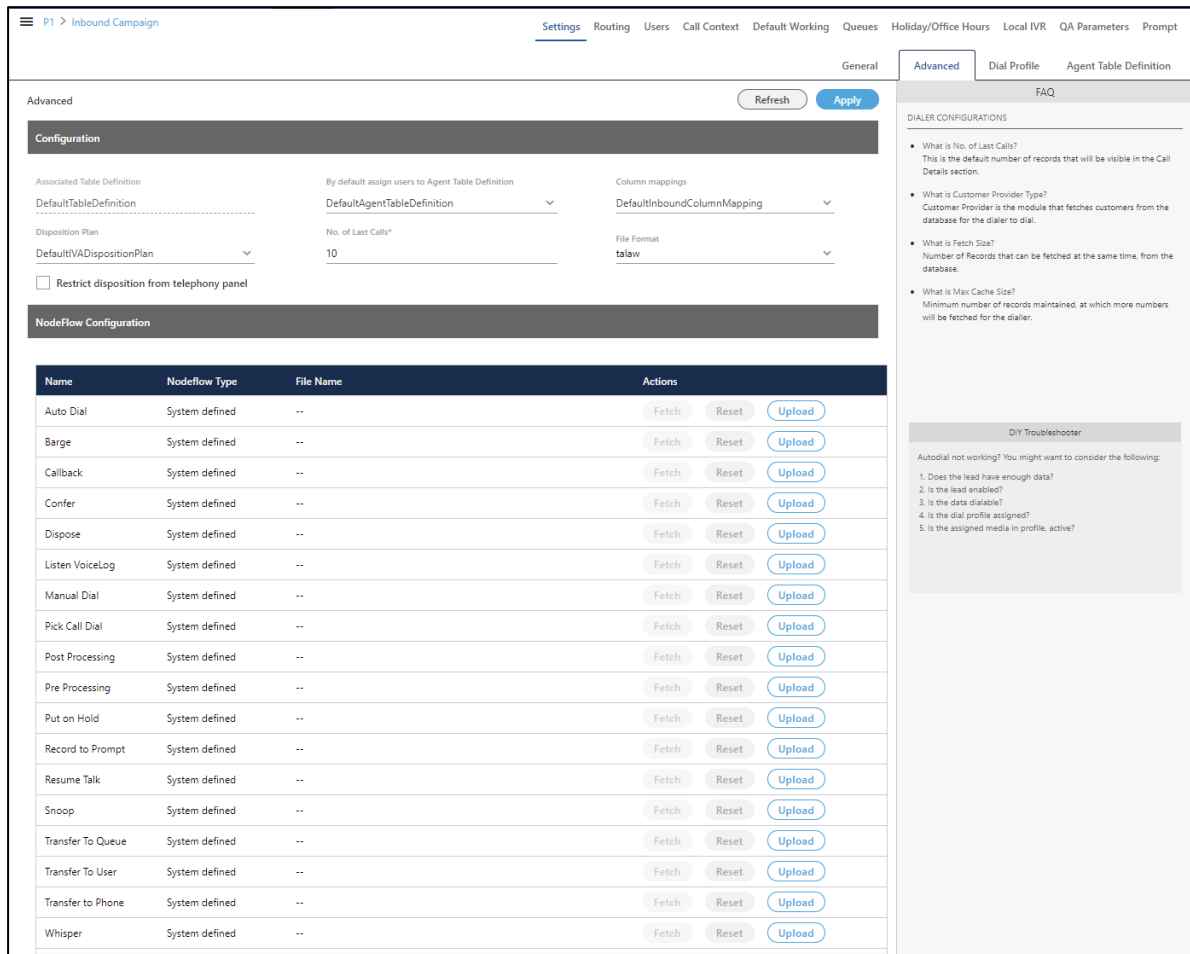


Figure: Advanced Settings

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

10.3.1.2.1 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.

10.3.1.2.2 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

10.3.1.3 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.

The screenshot displays the 'Dial Profile' configuration page. At the top, there are three tabs: 'General', 'Advanced', and 'Dial Profile', with 'Dial Profile' being the active tab. Below the tabs, there are two buttons: 'Refresh' and 'Apply'. The main content area is divided into two sections: 'Manual Dial Profile Settings' and 'Confer Dial Profile Settings'. Each section contains three input fields: 'Manual Dial Profile Policy' (with a 'Select' dropdown), 'Call Context' (with a dashed line indicating a selection), and 'Ringing TimeOut(in secs)' (with a value of '30'). Below each section, there is a 'Set up TimeOut (in secs)' field with a value of '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. **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

- 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.

The screenshot shows the 'Dial Profile' configuration page with tabs for 'General', 'Advanced', 'Dial Profile', and 'Agent Table Definition'. The 'Dial Profile' tab is active, showing 'Manual Dial Profile Settings' and 'Confer Dial Profile Settings'. Each section has a 'Manual Dial Profile Policy' and 'Confer Dial Profile Policy' with associated 'Call Context' and 'Ringling TimeOut(in secs)' values. The 'Apply' button is highlighted in blue.

Manual Dial Profile Settings	Confer Dial Profile Settings
Manual Dial Profile Policy	Confer Dial Profile Policy
1001_basic.single.call.context.type	1111_basic.single.call.context.type
Call Context	Call Context
1001	1111
Ringling TimeOut(in secs)	Ringling TimeOut(in secs)
30	30
Set up TimeOut (in secs)	Set up TimeOut (in secs)
15	15

Figure: Configured Dial Profile Settings

10.3.1.4 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...](#)

10.3.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the Chat Campaign Settings. [Know more...](#)

10.3.3 Queues

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

10.3.4 Default Working

Here, you can select the users who will be logged in to this campaign, by default, and will not receive the prompt to select the campaign. This tab has already been explained in the Chat Campaign Settings. [Know more...](#)

10.3.5 Holiday/Office Hours

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

10.3.6 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](#)

10.3.7 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.

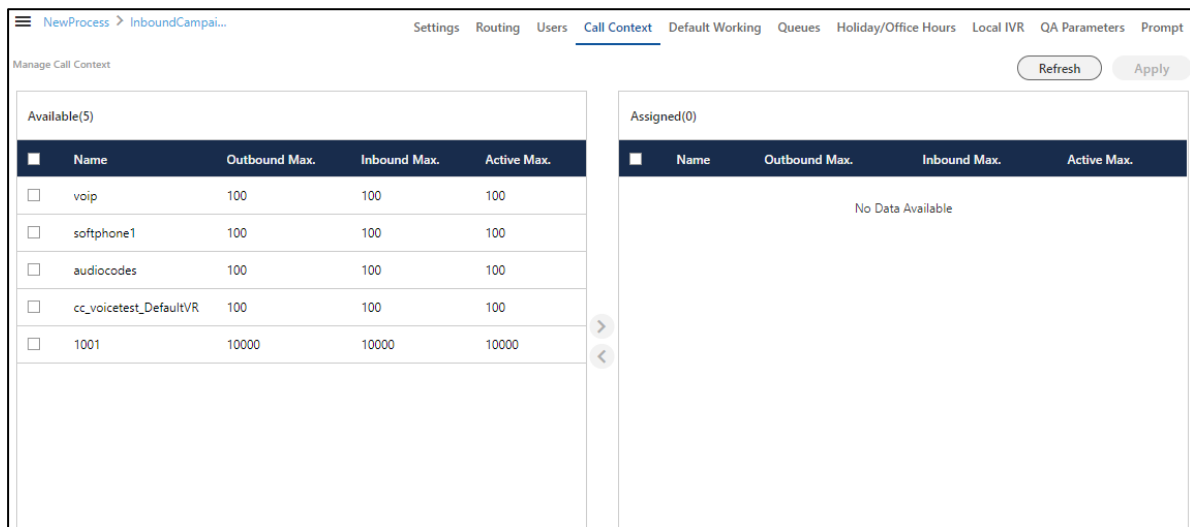



Figure: Call Context Settings

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.

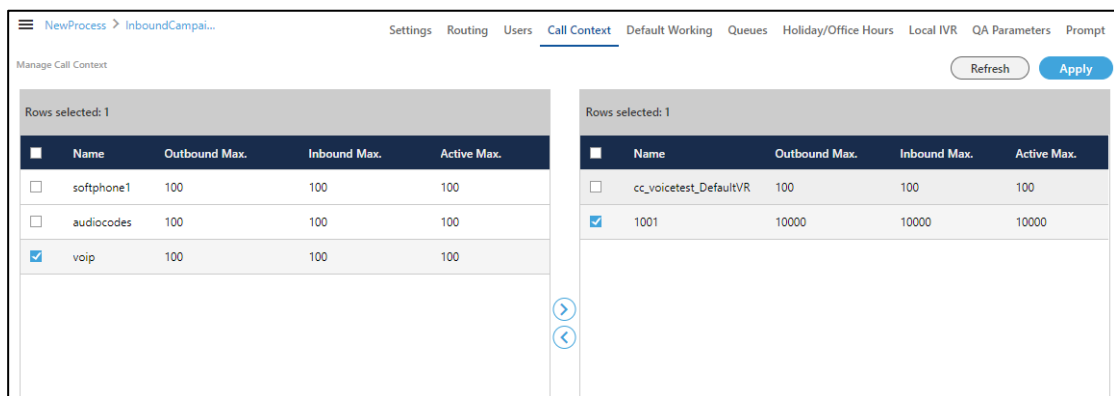


Figure: Assign or Unassign Call Contexts

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.

10.3.8 Queue Management in Voice Campaign

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

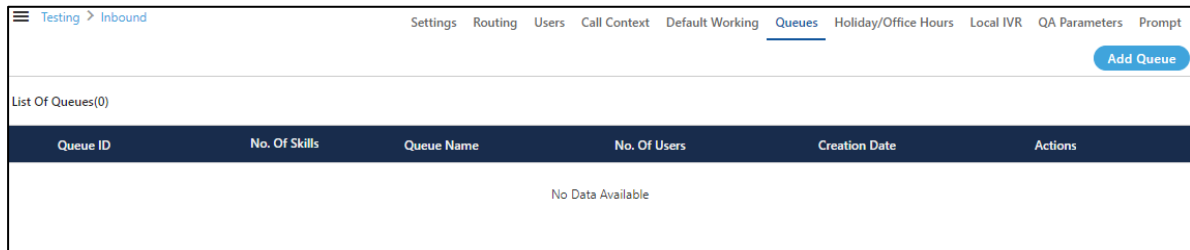


Figure: Queues Tab

10.3.8.1 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.

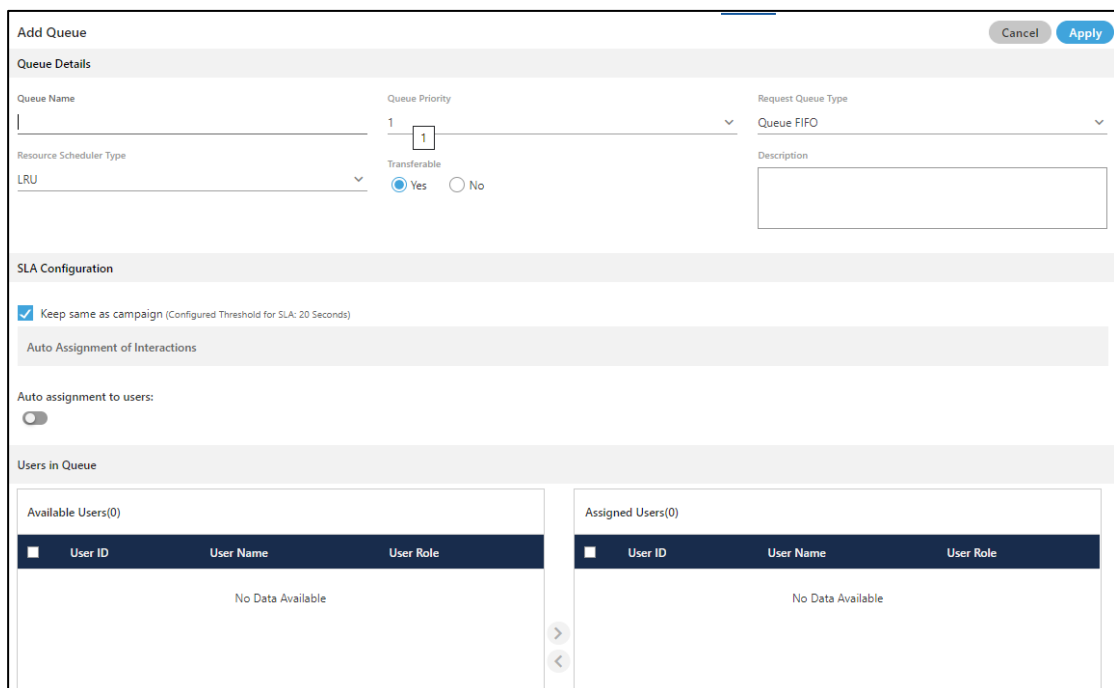


Figure: Create Queue





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

Transferrable: Yes No
 Description:

SLA Configuration

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

Users in Queue

Available Users(1)			
User ID	Username	User Role	
<input type="checkbox"/>	analyst	analyst	Analyst

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

Skills in Queue

Available Skills(1)	
Name	
<input type="checkbox"/>	Good

Assigned Skills(0)	
Name	
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.

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

10.3.8.2 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.

The screenshot displays the 'Edit Queue' configuration page for 'Queue1'. It includes sections for Queue Details, SLA Configuration, and Users in Queue. The 'Users in Queue' section is divided into 'Available Users' and 'Assigned Users'.

Queue Details:

- Queue Name: Queue1
- Request Queue Type: Queue FIFO
- Resource Scheduler Type: LRU
- Transferable: Yes No
- Description: [Empty text box]

SLA Configuration:

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

Users in Queue:

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

Skills in Queue:

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

Figure: Edit the Queue

10.3.8.3 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?

Figure: Delete Queue

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

10.3.9 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.

10.3.9.1 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.

10.3.9.2 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.

10.3.9.3 Local IVR Tab in Voice Campaign Settings

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

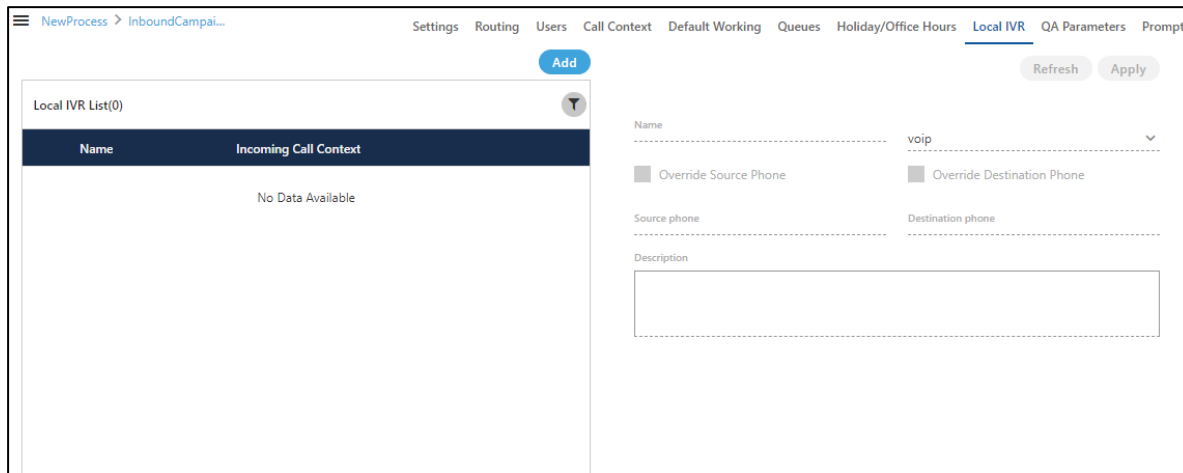


Figure: Local IVR Tab

10.3.9.4 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.

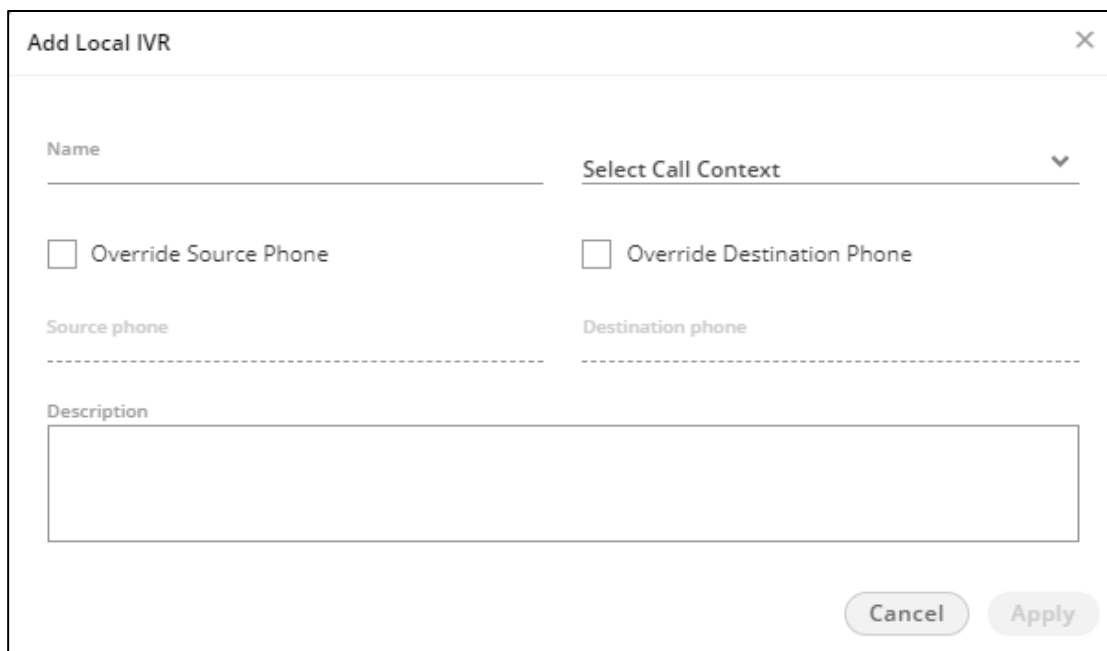
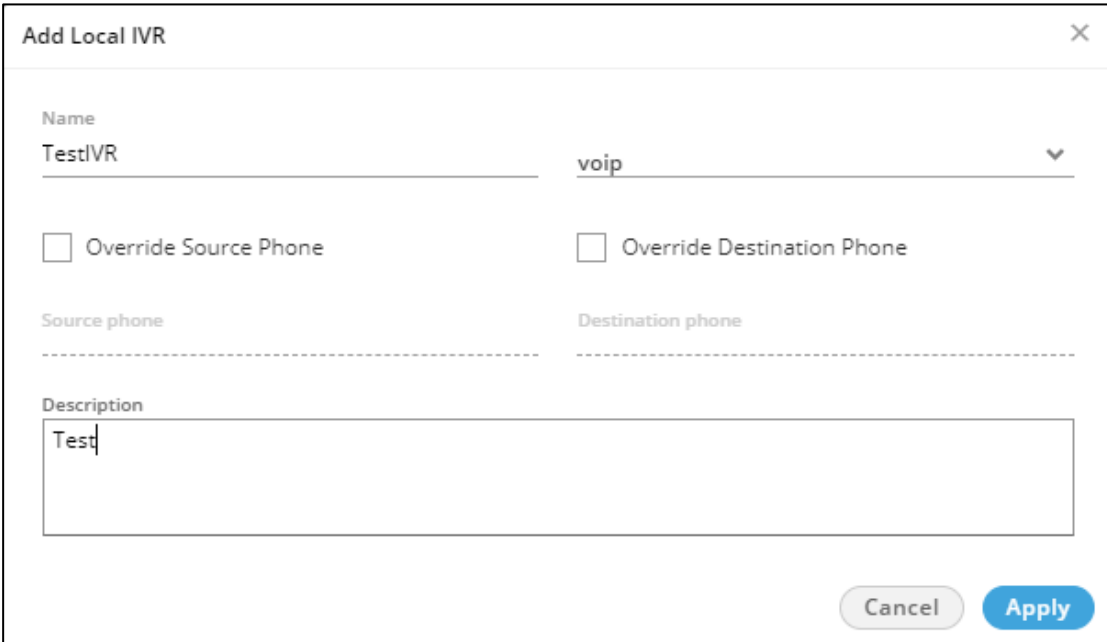


Figure: Add a Local IVR

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

- Name:** TestIVR
- Call Context:** voip (selected from a dropdown menu)
- Override Source Phone:**
- Override Destination Phone:**
- Source phone:** (empty text box)
- Destination phone:** (empty text box)
- Description:** Test

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

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.

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

10.3.9.7 Important Point

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

10.3.9.8 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.

10.3.9.9 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.

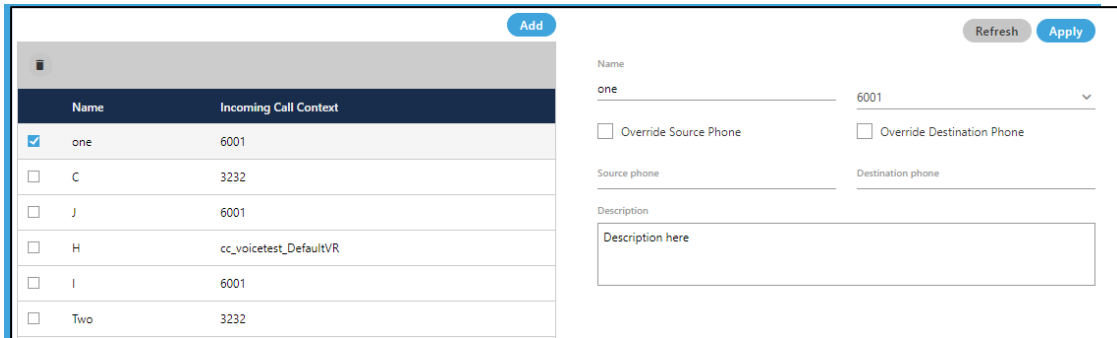


Figure: Sample Details

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

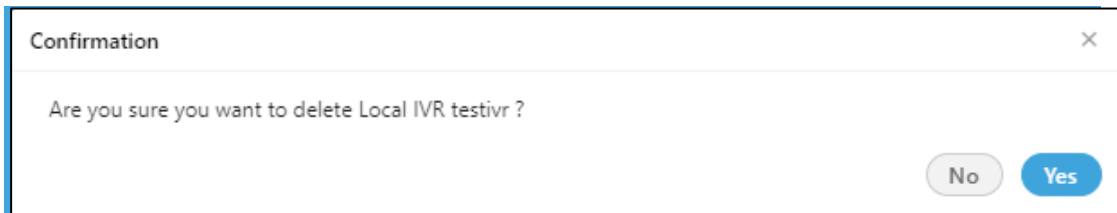


Figure: Warning before deleting an IVR

- 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>

10.3.10 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.

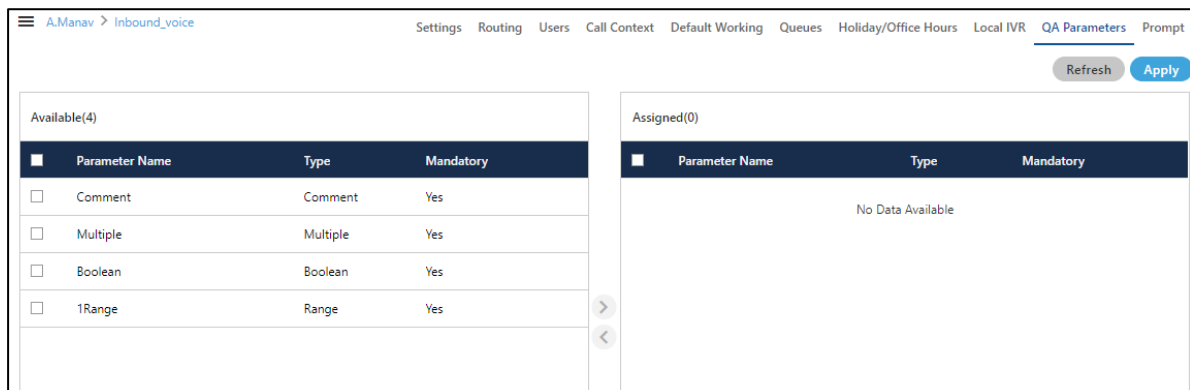



Figure: QA Parameters

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.

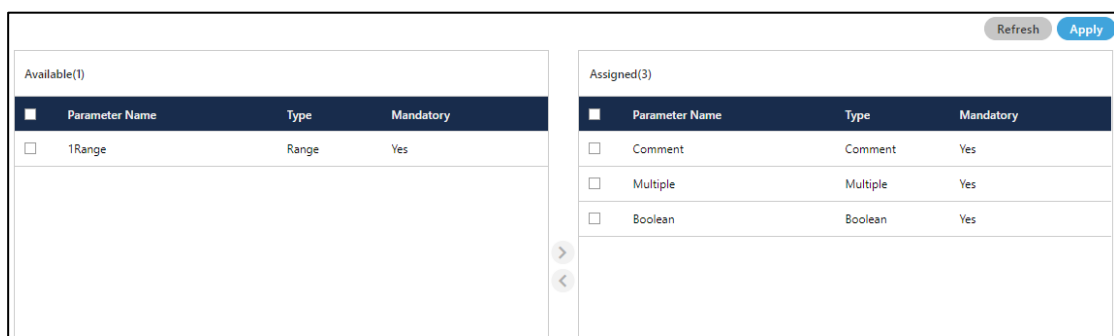



Figure: Assign or Unassign QA Parameters

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.

10.3.11 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.

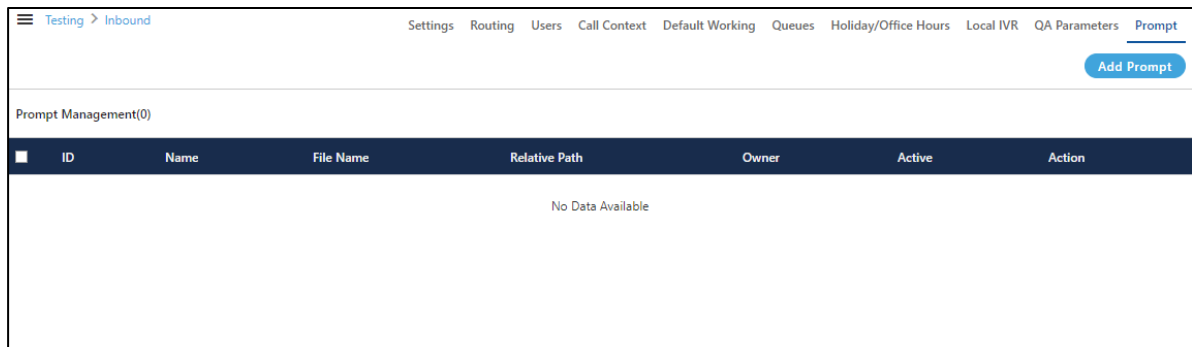


Figure: Prompt Management

10.3.11.1 Add a Prompt

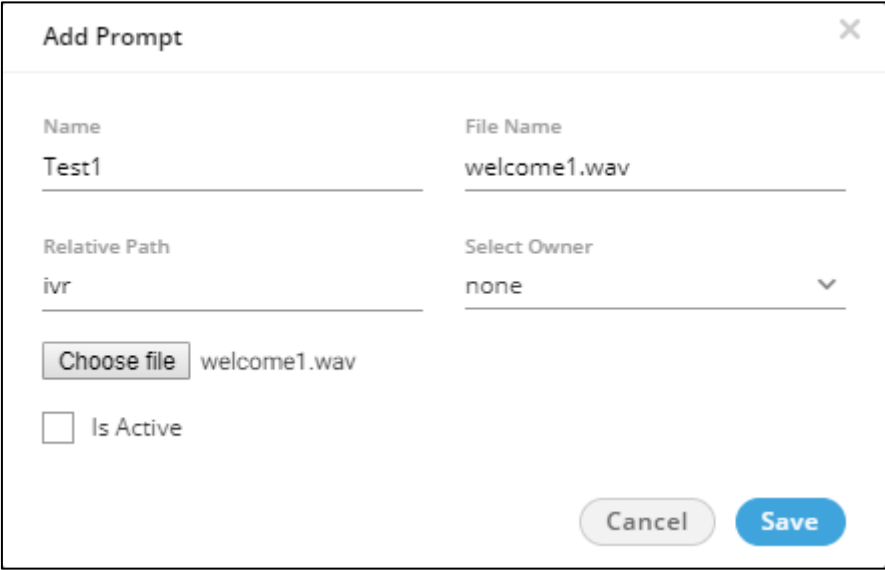
Perform the following steps to create a Prompt.

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

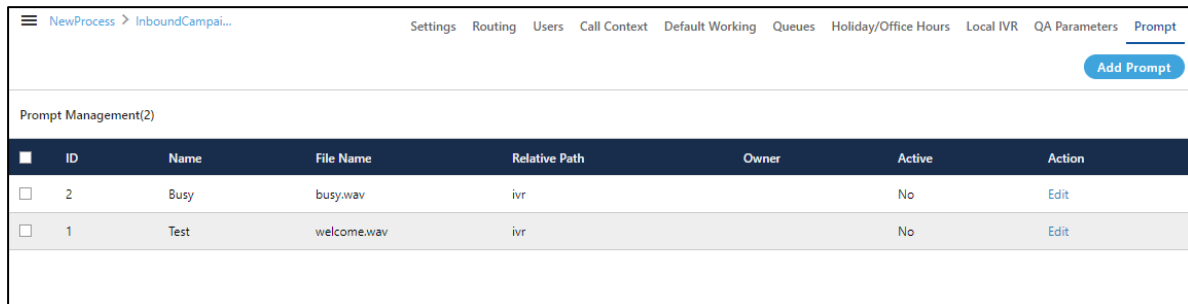
Below the fields, there is a "Choose file" button followed by the text "welcome1.wav". At the bottom left, there is a checkbox labeled "Is Active" which is currently unchecked. At the bottom right, there are two buttons: "Cancel" and "Save".

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.



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

10.3.11.2 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.

10.3.11.3 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

Choose file 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.

10.3.12 Routing in a Voice Campaign

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

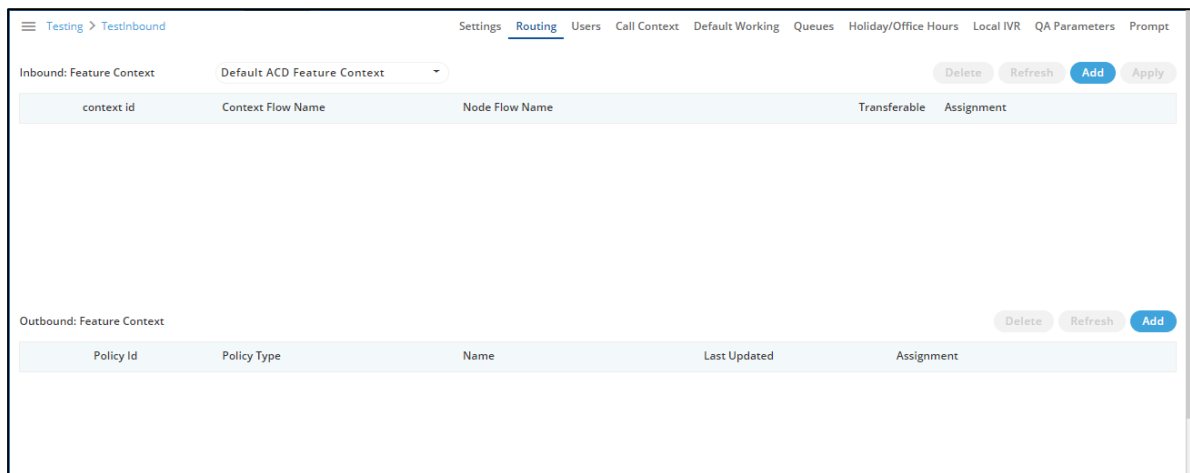


Figure: Routing

10.3.12.1 Routing for Inbound

10.3.12.1.1 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.

- 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".

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

10.3.12.1.2 Assign Nodeflow to a Queue

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

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

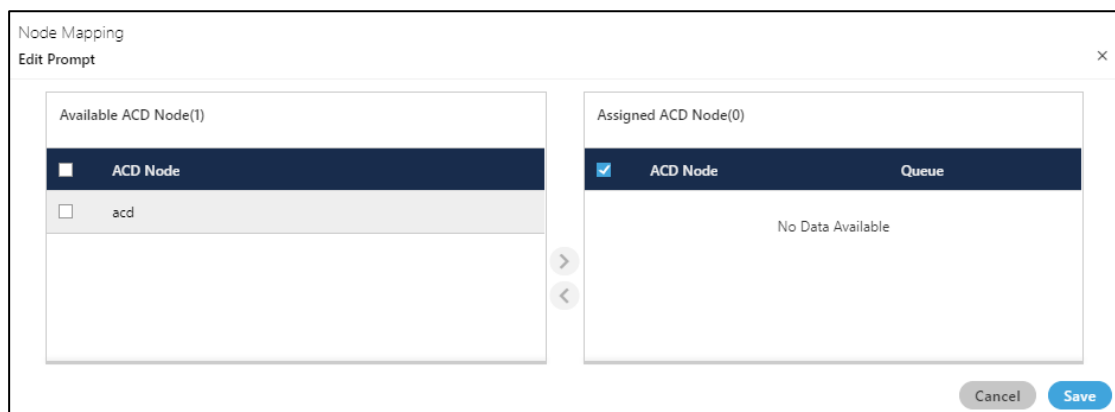



Figure: Assign Nodeflow to a Queue

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

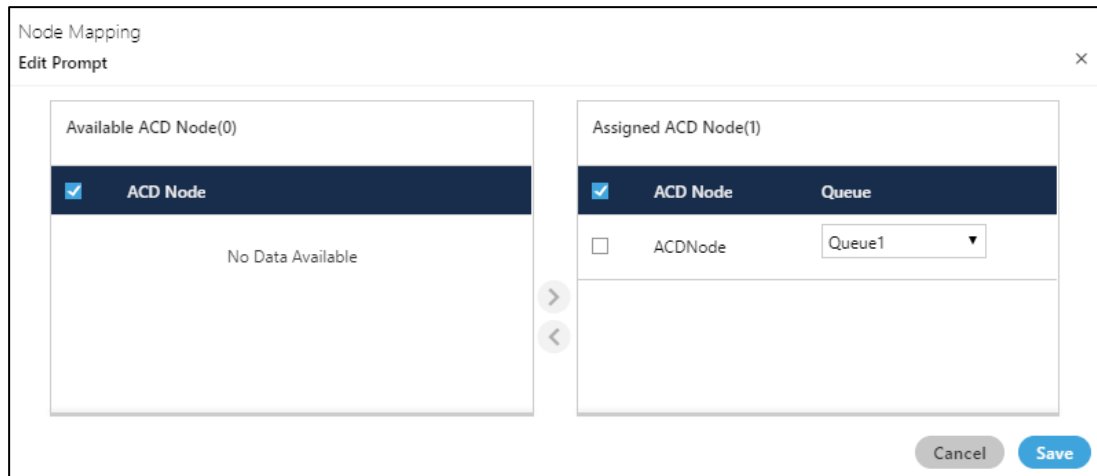


Figure: Assign Queue in ACDNode

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

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

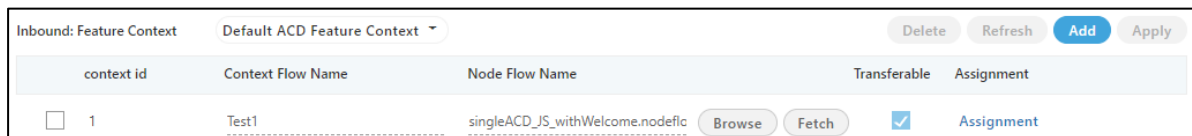


Figure: Added Nodeflows

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

10.3.12.1.3 Delete Routing Policy

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

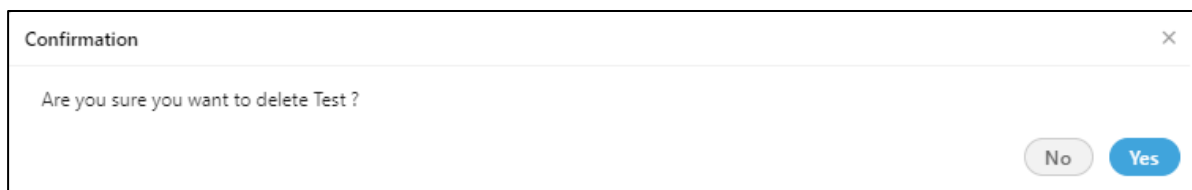


Figure: Delete Routing Policies

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

10.3.12.2 Routing for Outbound

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

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

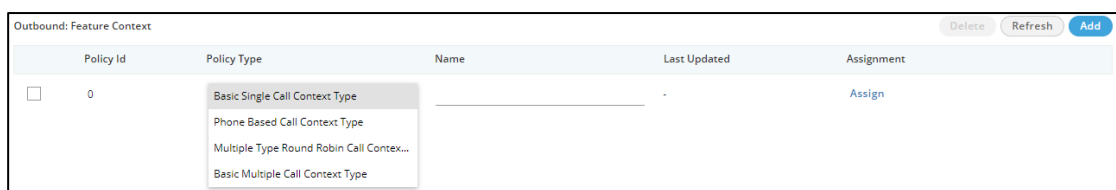


Figure: Adding an Outbound Routing Policy

3. Select any of the following Policy Types.
 - **Basic Single Call Context Type:** It is the policy type in which outbound calls will be dialed out from the single call context.
 - **Phone Based Call Context Type:** It is the policy type in which 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.

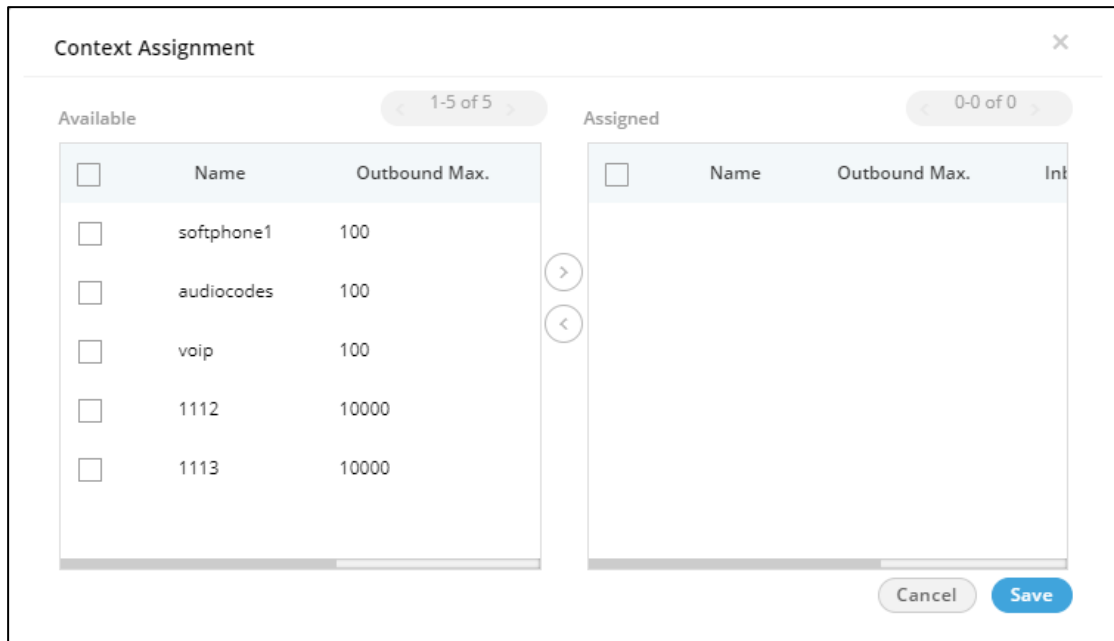



Figure: Select Call Contexts for Multiple Type Policy

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.

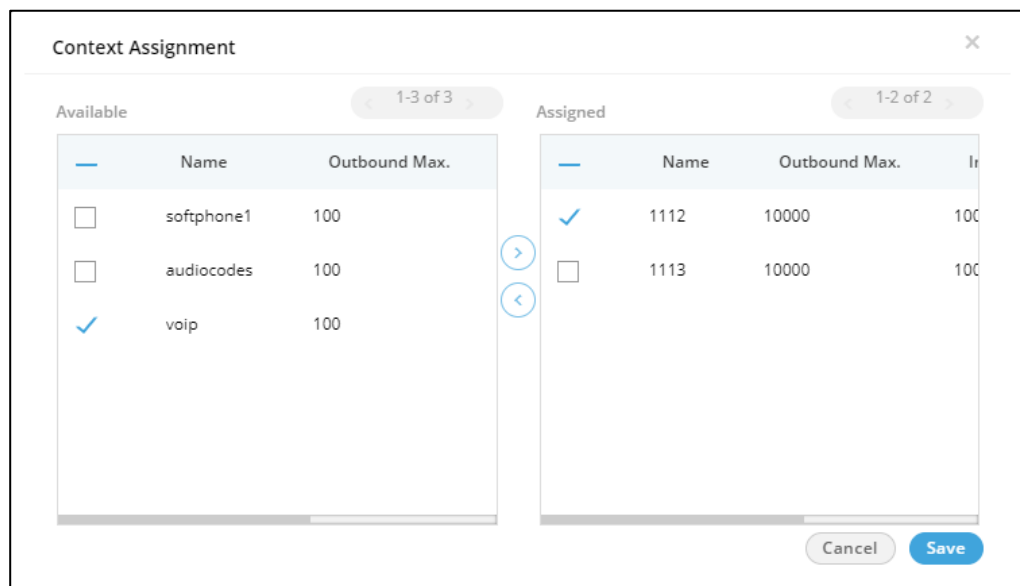



Figure: Assign or Unassign Call Contexts

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.

10.3.12.2.1 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".

10.3.12.3 Types of Routing in a Campaign

The following are the routing types in a Voice Campaign.

1. Skill-based Routing
2. Queue-based Routing
3. Priority-based Routing

10.3.12.3.1 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.

10.3.12.3.1.1 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.

10.3.12.3.1.2 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.

10.3.12.3.2 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.

10.3.12.3.2.1 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.

10.3.12.3.3 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.

10.3.12.3.3.1 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.

10.3.12.3.3.2 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.

10.3.12.3.4 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...](#)

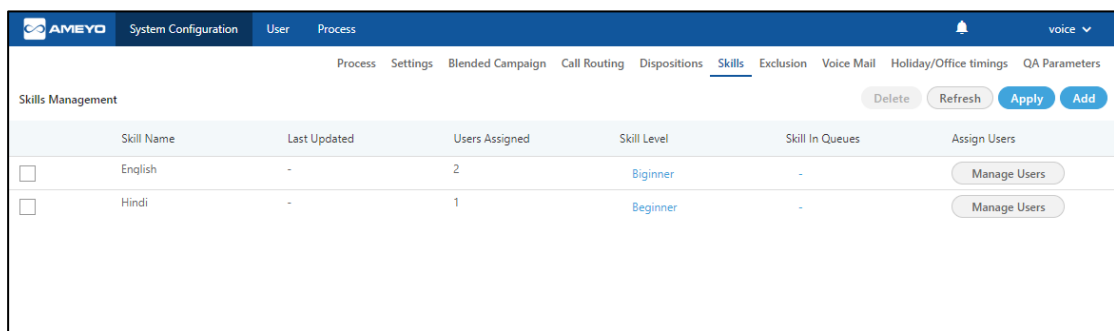


Figure: Added Skills

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...](#)

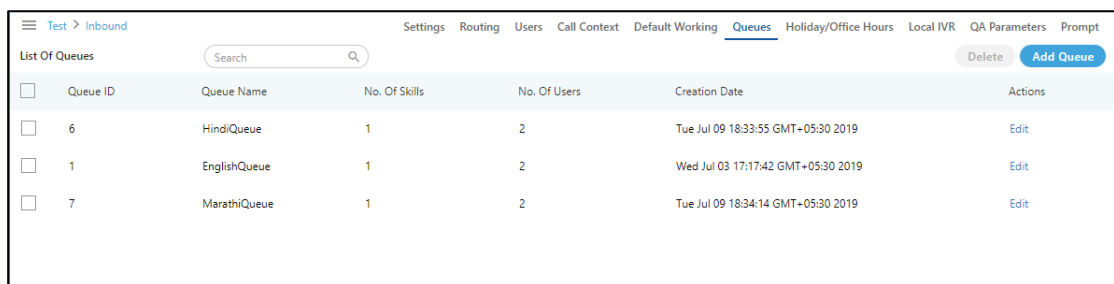


Figure: Assign Queues

3. Create the routing for the skills which you have created. Assign the ACD Node and the queues corresponding to the skills. [Know more...](#)

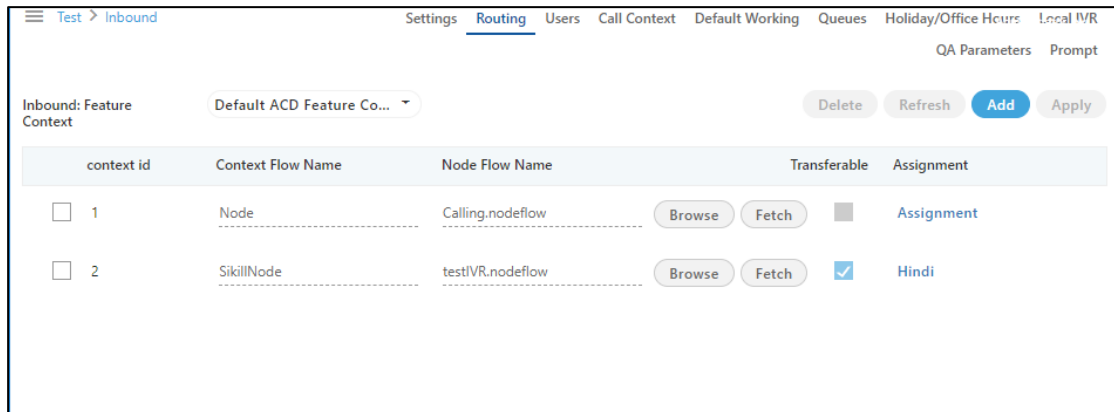


Figure: Assign Routing

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.

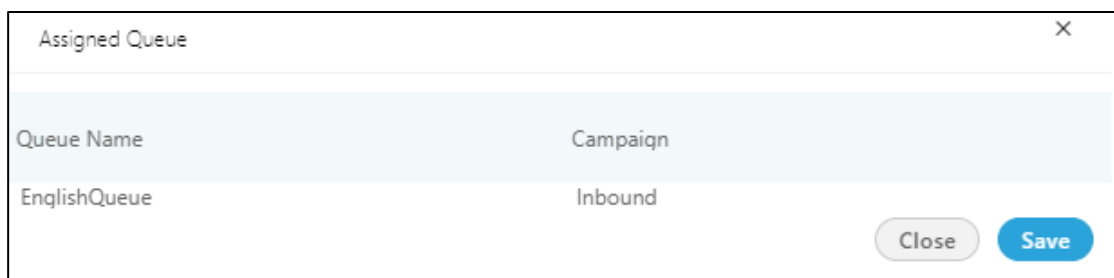


Figure: Assign the Queue

- 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.

10.4 Outbound Voice Campaign Settings

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

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

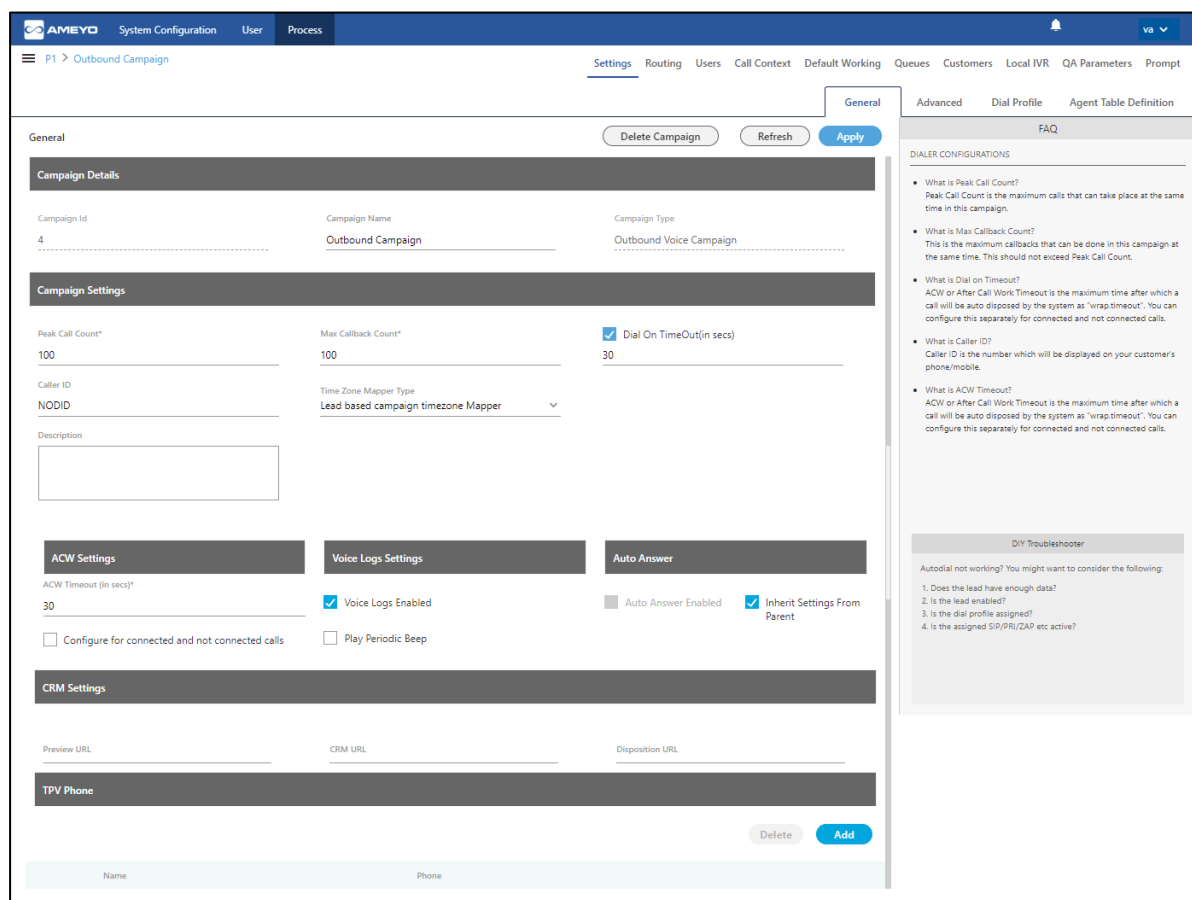


Figure: Settings of Outbound Voice Application Campaign

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

10.4.1 Settings Tab

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.
- **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.

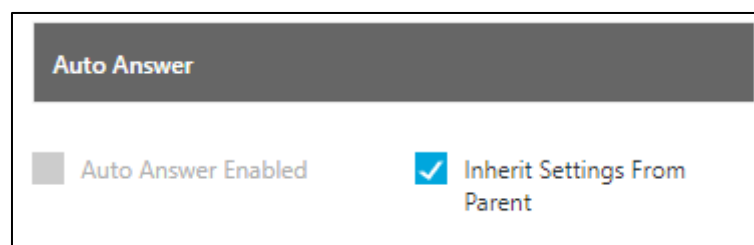
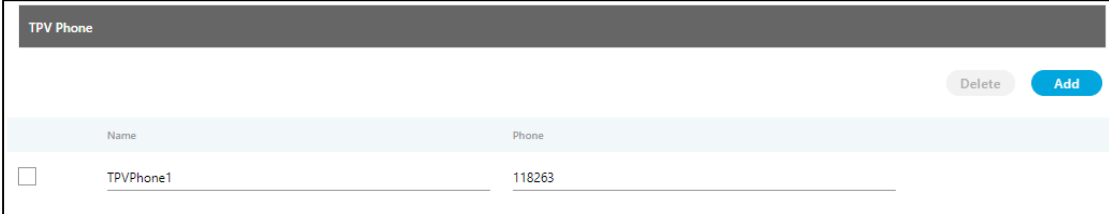


Figure: Auto-Answer Enabled

- **(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.



	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.

10.4.1.2 Advanced Settings

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

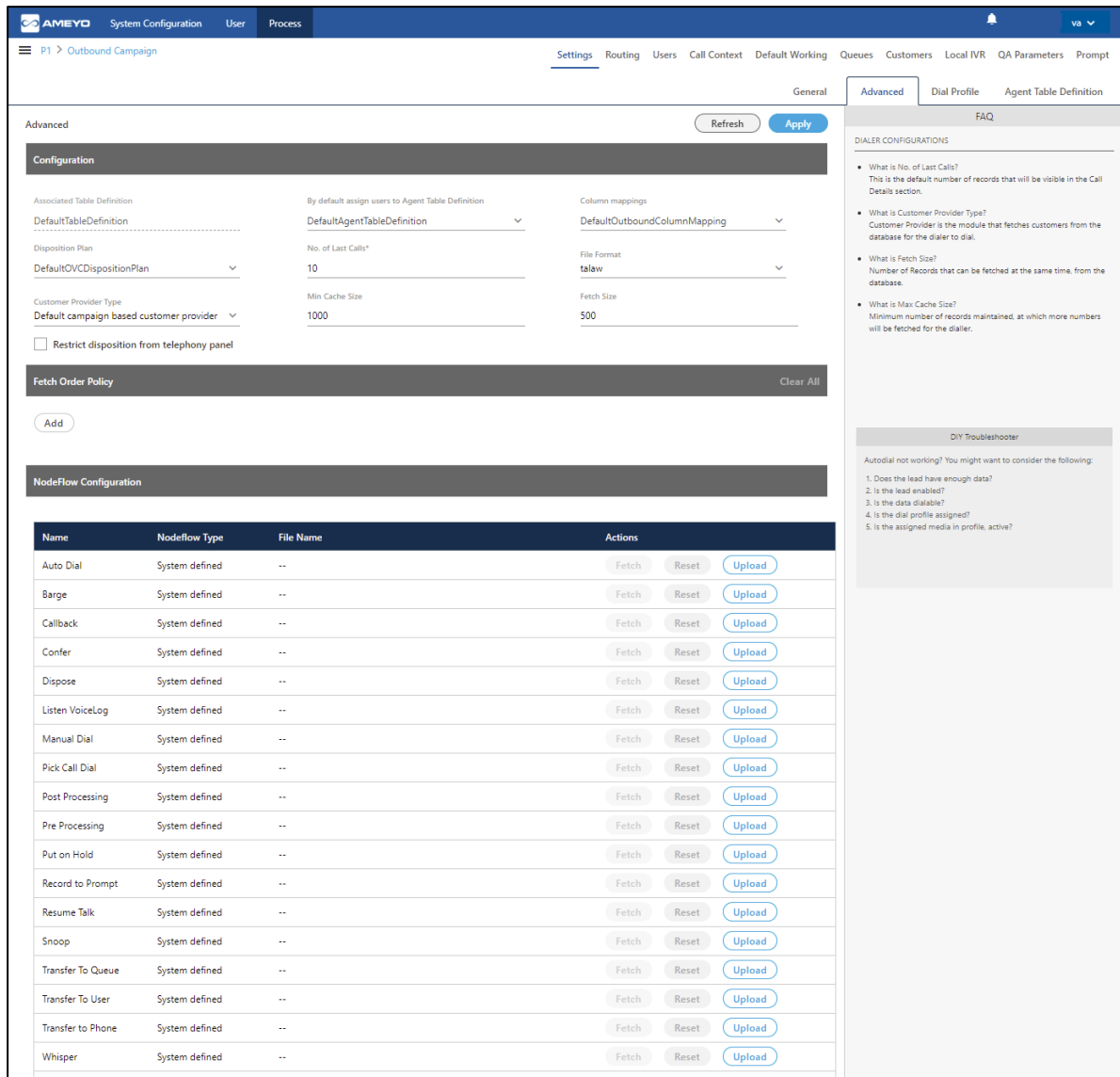


Figure: Advanced Settings

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 future 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 future 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.



The image shows a user interface element for selecting a fetch order policy. It consists of a dropdown menu with the text "Customer Upload Time" and a downward arrow. To the right of the dropdown are two buttons: "ASC" (highlighted in blue) and "DESC".

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.

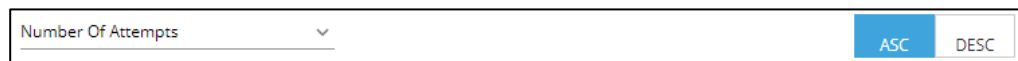


Figure: "Number of Attempts" Fetch Order Policy

- **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.

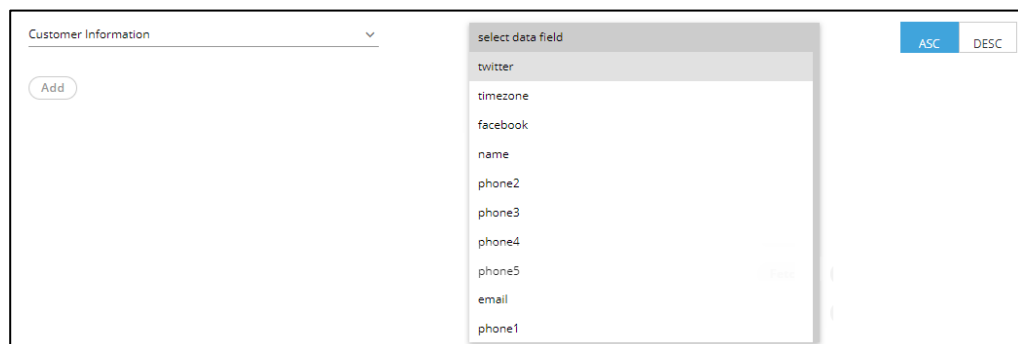


Figure: "Customer Information" Fetch Order Policy

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.

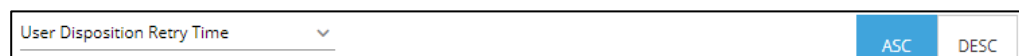
A screenshot of a user interface element. It features a dropdown menu with the text 'User Disposition Retry Time' and a downward arrow. To the right of the dropdown are two buttons: 'ASC' (highlighted in blue) and 'DESC'.

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

10.4.1.3 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 interface. The page is divided into three main sections for configuring different dialing methods: Manual, Confer, and Auto. Each section includes a dropdown for selecting a 'Manual Dial Profile Policy', a dropdown for 'Call Context', and a text input for 'Ringling TimeOut(in secs)' (set to 30). Additionally, there is a 'Set up TimeOut (in secs)' input field (set to 15) for each section. The interface includes navigation tabs at the top and '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. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds
 - C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

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

- 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.

The screenshot displays the 'Dial Profile' configuration page. At the top, there is a navigation bar with tabs for 'General', 'Advanced', 'Dial Profile', and 'Agent Table Definition'. The 'Dial Profile' tab is selected. Below the navigation, there are three distinct sections for different dial profile types: 'Manual Dial Profile Settings', 'Confer Dial Profile Settings', and 'Auto Dial Profile Settings'. Each section contains a table of settings. For the 'Manual Dial Profile Settings' section, the 'Manual Dial Profile Policy' is '1001_basic.single.call.context.type', 'Set up TimeOut (in secs)' is '15', 'Call Context' is 'Call Context', and 'Ringing TimeOut(in secs)' is '30'. Similar settings are shown for the 'Confer' and 'Auto' sections. At the top right of the settings area, there are 'Refresh' and 'Apply' buttons.

Figure: Configured Dial Profile Settings

10.4.1.4 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...](#)

10.4.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the Chat Campaign Settings. [Know more...](#)

10.4.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the Inbound Campaign Settings. [Know more...](#)

10.4.4 Default Working

Here, you can select the users who will be logged in to this campaign, by default, and will not receive the prompt to select the campaign. This tab has already been explained in the Chat Campaign Settings. [Know more...](#)

10.4.5 Holiday/Office Hours

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

10.4.6 Call Context

Here, you can define the call contexts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.4.7 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.4.8 Local IVR

Here, you can create the Local IVRs for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.4.9 QA Parameters

Here, you can assign or unassign the QA Parameters to this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.4.10 Prompt

Here, you can create and manage the Voice Prompts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.4.11 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](#)

10.4.11.1 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.

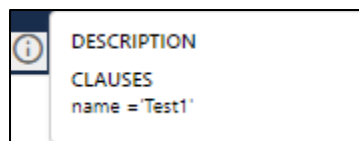


Figure: Filter Details

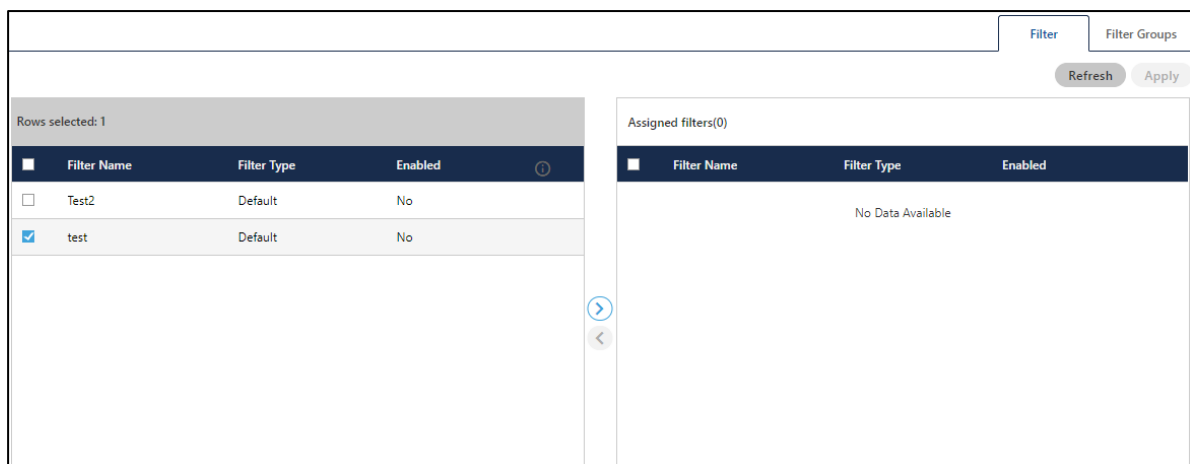

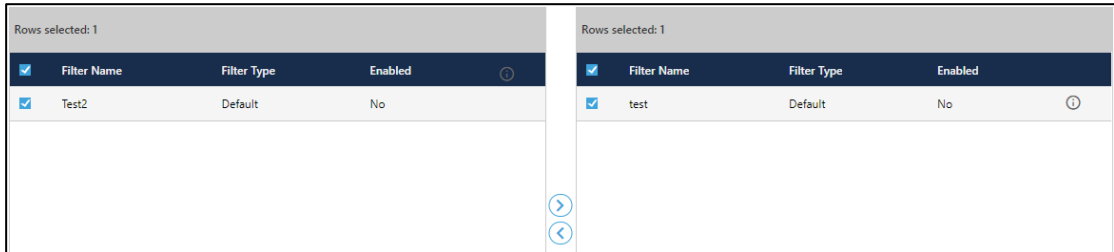


Figure: Customer Filter Settings

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.




Filter Name	Filter Type	Enabled
Test2	Default	No

Filter Name	Filter Type	Enabled
test	Default	No

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.

10.4.11.2 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.

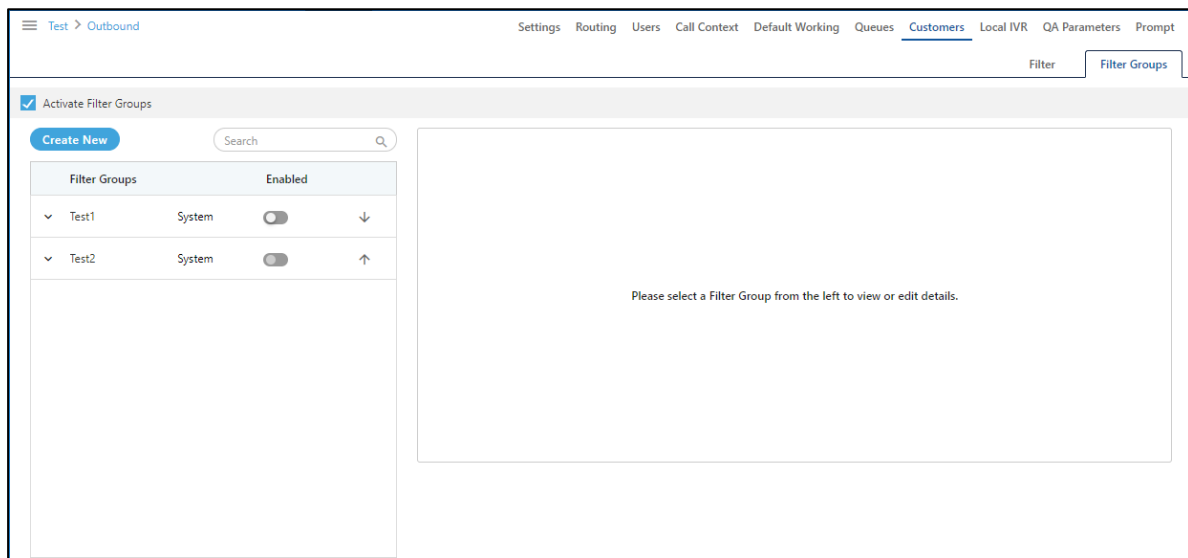


Figure: Customer Filter Groups

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...](#)

10.4.11.3 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.

10.5 Parallel Predictive Voice Campaign Settings

In the left navigation bar of Process Tab, you can select a Parallel Predictive Voice Campaign to view its settings.

The changes made in settings of one Parallel Predictive Voice Campaign will be applicable to that campaign itself. They will not be applicable on other similar (parallel) and different (non-parallel) campaigns.

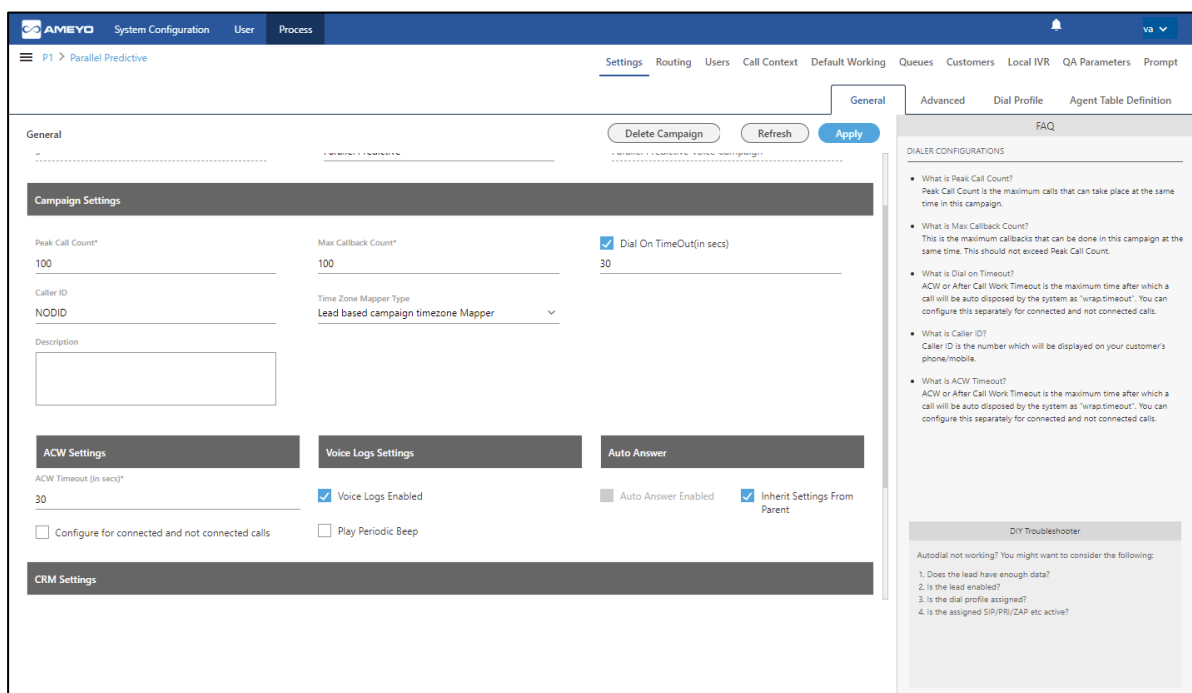


Figure: Settings of Parallel Predictive Voice Application Campaign

It contains the following tabs.

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

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

10.5.1 Settings Tab

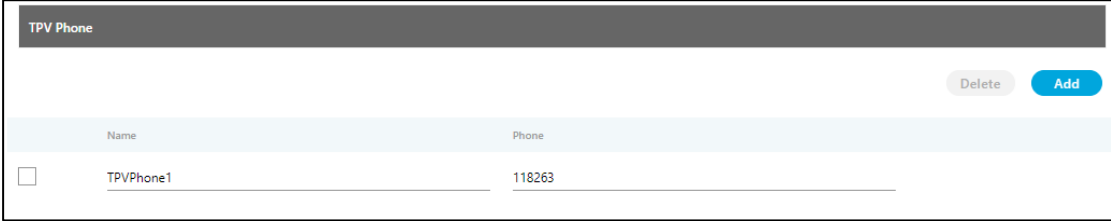
This tab contains "General Settings", "Advanced" Settings, and "Dial Profile" Settings.

10.5.1.1 General Settings

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

- **Campaign Details:** These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.
- **Campaign Settings:** It contains the same settings, which you have configured while creating this campaign.
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- **TPV Phone:** As per the process requirement, there may be a few numbers to which transfer of calls is very frequent. Third-party verification (TPV) number is used to

transfer the call to verifier. Here, such frequently used TPV numbers are added so that the user can directly transfer the case to these numbers.



	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.

10.5.1.2 Advanced Settings

Here, the Voice-Admin can configure the Advanced Settings of a Parallel Predictive Voice Campaign.

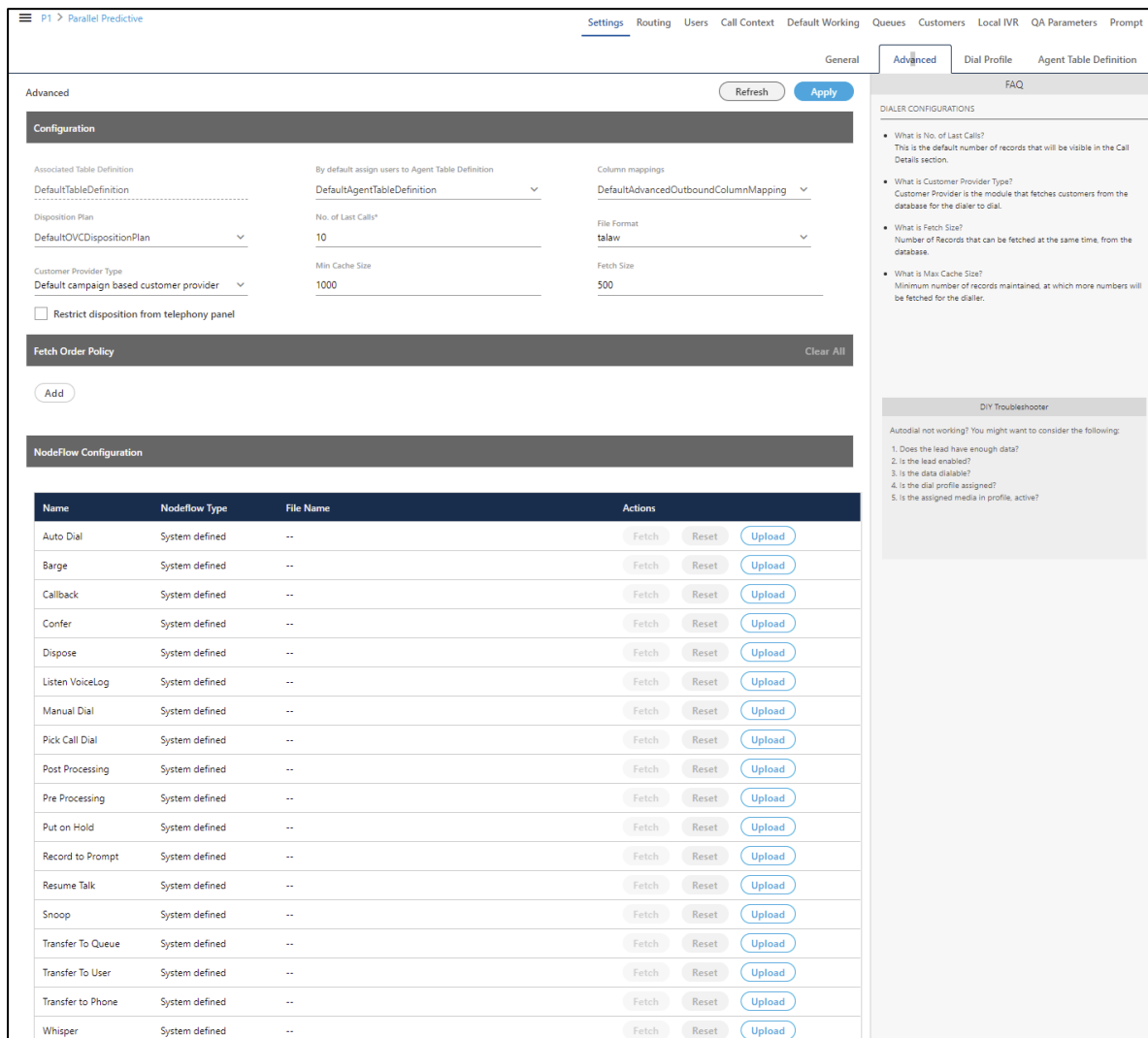


Figure: Advanced Settings

This tab can be divided into these sections: "Configuration", "Fetch Order Policy", and "NodeFlow Configuration".

10.5.1.2.1 Configuration

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

- Disposition Plan
- Column Mappings
- No. of Last Calls

- File Format

It also contains the following settings, which you can configure after creating the Outbound Campaign.

- **Default Table Definition:** Here, you can select the default Table Definition for this campaign.
- **By default assign users to Agent Table Definition:** Here, you can select the default Agent Table Definition for this campaign.
- **Customer Provider Type:** Select the algorithm for the dialer to pick and dial the customers from the database.
 - **Campaign Based Customer Provider:** It is the default customer provider, which will fetch maximum possible numbers from the highest priority leads in one query. If numbers fetched are less than the required numbers, then it will also fetch numbers from the lower priority leads. Cache will not be maintained on per lead basis. This provider will fallback to Lead Based Customer Provider in a Predictive Parallel Campaign.
 - **Lead Based Customer Provider:** It can be used to dial the numbers as per the lead priority. Customers with high priority will be dialed first, whereas customers with less priority will be dialed after it. If two leads have same priority numbers, then they will be selected for dialing as per their weights.

- Lead Based Customer Provider is the recommended for Parallel

Predictive Dialer and Parallel Predictive Campaign.

- It is recommended to maintain cache per lead in case of lead to queue mapping in a Parallel Predictive Campaign so that all the queues get enough numbers, if available.

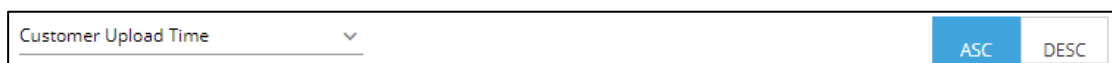
- This method is not recommended when lead leveling is not required.
- If large number of leads are enabled for a campaign and no lead leveling is required, then this method is not recommended. Else, the Campaign Based Customer Provider is recommended in such a scenario.

- [PACE Based Customer Provider](#): It is the recommended method for a Parallel Predictive Campaign. Select it to enable the PACE.
- **Minimum Cache Size**: Provide the minimum size for the cache that is the count of numbers that can be stored a time.
- **Fetch Size**: Provide the count of numbers that can be fetched at a time.

10.5.1.2.2 [Fetch Order Policy](#)

Here, you have to add and define "Fetch Order Policy" to fetch the customers' numbers. Select any of the following policies.

- **Customer Upload Time**: The customers to be dialed are selected as per the time of the uploading of their numbers to the campaign. After selecting it, you can select ascending or descending order of the sorting the numbers.



Customer Upload Time ▾ ASC DESC

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.

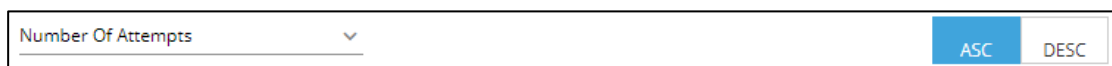


Figure: "Number of Attempts" Fetch Order Policy

- **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.

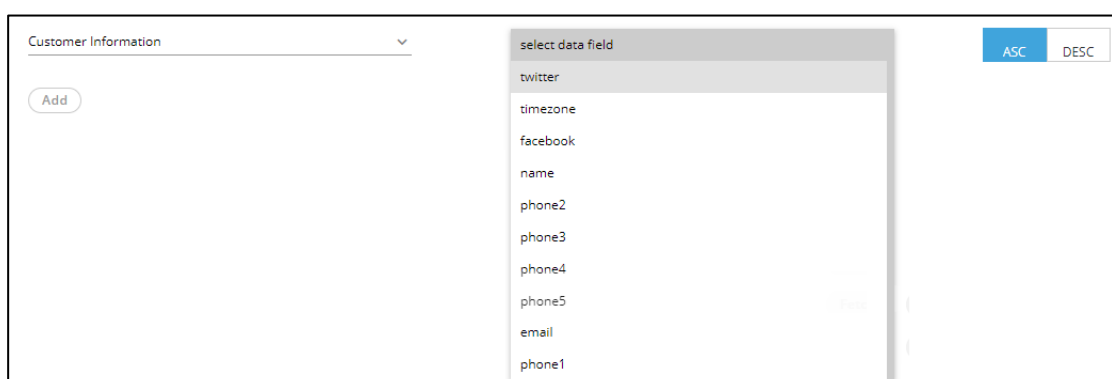


Figure: "Customer Information" Fetch Order Policy

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.

A screenshot of a web interface element. It features a dropdown menu with the text 'User Disposition Retry Time' and a downward arrow. To the right of the dropdown are two buttons: 'ASC' (highlighted in blue) and 'DESC'.

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.

10.5.1.2.3 [NodeFlow Configuration](#)

It lets you upload the nodeflow for the different functions listed herein below.

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

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

10.5.1.3 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 interface. The page is divided into three main sections for configuring different dialing methods: Manual, Confer, and Auto. Each section includes a dropdown for selecting a policy, a dropdown for selecting a call context, and a text input for the ringing timeout in seconds. The ringing timeout is currently set to 30 seconds for all three methods. Additionally, there is a 'Set up TimeOut (in secs)' field for each method, currently set to 15 seconds. The interface includes navigation tabs at the top and 'Refresh' and 'Apply' buttons for saving changes.

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. **Ringing Timeout (in secs.):** It is the maximum ringing time, after which call gets disconnected if the recipient does not answer the call. Provide a value in seconds for the same. The default value is 30 seconds
 - C. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

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

- 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.

Dial Profile		
Manual Dial Profile Settings	Confer Dial Profile Settings	Auto Dial Profile Settings
Manual Dial Profile Policy TestBasicSingle1 Set up TimeOut (in secs) 15	Call Context voip	Ringing TimeOut(in secs) 30
Confer Dial Profile Policy TestMultiple1 Set up TimeOut (in secs) 15	Call Context cc_voicetest_DefaultVR,softphone1,Test	Ringing TimeOut(in secs) 30
Auto Dial Profile Policy TestMultiple1 Set up TimeOut (in secs) 15	Call Context cc_voicetest_DefaultVR,softphone1,Test	Ringing TimeOut(in secs) 30

Figure: Configured Dial Profile Settings

10.5.1.4 Agent Table Definition

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

10.5.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the Chat Campaign Settings. [Know more...](#)

10.5.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the Inbound Campaign Settings. [Know more...](#)

10.5.4 Default Working

Here, you can select the users who will be logged in to this campaign, by default, and will not receive the prompt to select the campaign. This tab has already been explained in the Chat Campaign Settings. [Know more...](#)

10.5.5 Holiday/Office Hours

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

10.5.6 Call Context

Here, you can define the call contexts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.5.7 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.5.8 Local IVR

Here, you can create the Local IVRs for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.5.9 QA Parameters

Here, you can assign or unassign the QA Parameters to this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.5.10 Prompt

Here, you can create and manage the Voice Prompts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.5.11 Customer Tab

Here, you can assign and unassign the customer filters and group the filters in this campaign. This tab has already been explained in "Outbound Voice Campaign". [Know more...](#)

10.6 Voice Blast Campaign Settings

In the left navigation bar of Process Tab, you can select a Voice Blast Campaign to view its settings.

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

The screenshot shows the 'Voice Blast Campaign Settings' page. At the top, there are navigation tabs: 'Settings', 'Routing', 'Users', 'Call Context', 'Holiday/Office Hours', 'Customers', and 'Prompt'. Below these, there are sub-tabs: 'General', 'Advanced', and 'Dial Profile'. The 'General' tab is selected. The page is divided into two main sections: 'Campaign Details' and 'Campaign Settings'.
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 (dropdown menu)
- Caller ID: NODID
- Description: (empty text box)
On the right side, there are two sections: 'DIALER CONFIGURATIONS' and '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 customers 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.
FAQ:
- 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/ZAP 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

10.6.1 Settings Tab

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

10.6.1.1 General Settings

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

- **Campaign Details:** These are the same details, which you have provided while creating this campaign. You can only change the campaign name here.
- **Campaign Settings:** It contains the same settings, which you have configured while creating this campaign.
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- **TPV Phone:** As per the process requirement, there may be a few numbers to which transfer of calls is very frequent. Third-party verification (TPV) number is used to transfer the call to verifier. Here, such frequently used TPV numbers are added so that the user can directly transfer the case to these numbers.



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.

10.6.1.2 Advanced Settings

Here, the Voice-Admin can configure the Advanced Settings of a Voice Blast Campaign.

The screenshot displays the 'Advanced Settings' for a Voice Blast Campaign. At the top, there are navigation tabs: Settings, Routing, Users, Call Context, Holiday/Office Hours, Customers, and Prompt. Below these, there are sub-tabs: General, Advanced (selected), and Dial Profile. The main content area is divided into several sections:

- Configuration:** Includes fields for 'Associated Table Definition' (DefaultTableDefinition), 'Column mappings' (DefaultBlastColumnMapping), 'No. of Last Calls*' (10), 'File Format' (talaw), 'Customer Provider Type' (Default campaign based customer provider), 'Fetch Size' (500), and a checkbox for 'Restrict disposition from telephony panel'.
- Fetch Order Policy:** Features a 'Clear All' button and an 'Add' button.
- NodeFlow Configuration:** A table listing various call flow actions with their respective Nodeflow Type and File Name. Each row has 'Fetch', 'Reset', and 'Upload' buttons.

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

On the right side, there is a 'FAQ' section titled 'DIALER CONFIGURATIONS' with several questions and answers, and a 'DIY Troubleshooter' section with a list of diagnostic steps.

Figure: Advanced Settings

This tab can be divided into these sections - "Configuration", "Fetch Order Policy", and "NodeFlow Configuration".

10.6.1.2.1 Configuration

Except for the following, "Configuration" section contains those settings that you have already configured while creating this Parallel Predictive campaign. You can change the values for Column Mappings, Disposition Plan, Number of Last Calls, and File Format.

- **Customer Provider Type:** Select the algorithm for the dialer to pick and dial the customers from the database.
 - **Campaign Based Customer Provider:** It is the default customer provider, which will fetch maximum possible numbers from the highest priority leads in one query. If numbers fetched are less than the required numbers, then it will also fetch numbers from the lower priority leads. Cache will not be maintained on per lead basis. This provider will fallback to Lead Based Customer Provider in a Predictive Parallel Campaign.
 - **Lead Based Customer Provider:** It can be used to dial the numbers as per the lead priority. Customers with the high priority will be dialed first, whereas customers with less priority will be dialed after it. If two leads have same priority numbers, then they will be selected for dialing as per their weights.

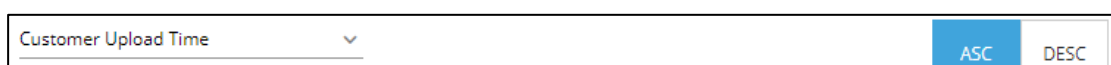
▪ **Lead Based Customer Provider is the recommended for Parallel Predictive Dialer and Parallel Predictive Campaign.**

- It is recommended to maintain cache per lead in case of lead to queue mapping in a Parallel Predictive Campaign so that all the queues get enough numbers, if available.
 - This method is not recommended when lead leveling is not required.
 - If large number of leads are enabled for a campaign and no lead leveling is required, then this method is not recommended. Else, the Campaign Based Customer Provider is recommended in such a scenario.
- PACE Based Customer Provider: It is the recommended method for a Parallel Predictive Campaign. Select it to enable the PACE.
- **Minimum Cache Size**: Provide the minimum size for the cache that is the count of numbers that can be stored a time.
 - **Fetch Size**: Provide the count of numbers that can be fetched at a time.

10.6.1.2.2 [Fetch Order Policy](#)

Here, you have to add and define "Fetch Order Policy" to fetch the customers' numbers. Select any of the following policies.

- **Customer Upload Time**: The customers to be dialed are selected as per the time of the uploading of their numbers to the campaign. After selecting it, you can select ascending or descending order of the sorting the numbers.



Customer Upload Time	▼	ASC	DESC
----------------------	---	-----	------

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.

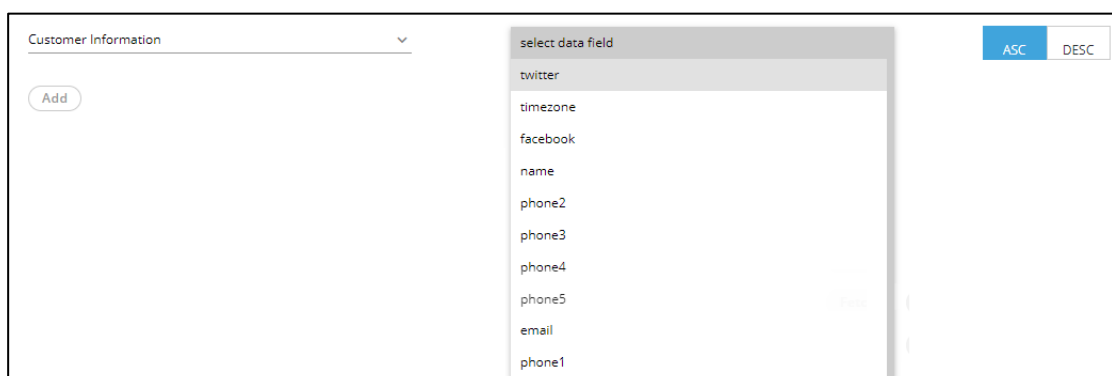
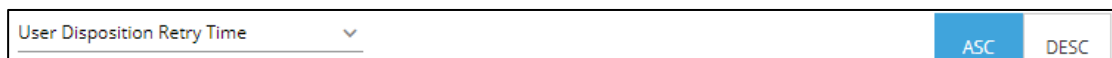


Figure: "Customer Information" Fetch Order Policy

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.



The image shows a UI component with a dropdown menu on the left containing the text 'User Disposition Retry Time' and a downward arrow. To the right of the dropdown are two buttons: a blue button labeled 'ASC' and a white button labeled 'DESC'.

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.

10.6.1.2.3 [NodeFlow Configuration](#)

It lets you upload the nodeflow for the different functions listed herein below.

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

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

10.6.1.3 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 separator), and 'Ringling TimeOut(in secs)' (with a value of 30). The 'Auto Dial Profile Settings' section also includes a 'Set up TimeOut (in secs)' field with a value of 15. The interface includes a navigation menu at the top with options like 'Settings', 'Routing', 'Users', 'Call Context', 'Holiday/Office Hours', 'Customers', and 'Prompt'. There are also 'General', 'Advanced', and 'Dial Profile' tabs, and 'Refresh' and 'Apply' buttons at the bottom right of the form.

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 system. The page is titled 'P1 > Voice Blast' and includes navigation tabs for 'Settings', 'Routing', 'Users', 'Call Context', 'Holiday/Office Hours', 'Customers', and 'Prompt'. The 'Dial Profile' tab is active, with sub-tabs for 'General', 'Advanced', and 'Dial Profile'. The 'Dial Profile' section contains two main settings areas: 'Confer Dial Profile Settings' and 'Auto Dial Profile Settings'. Each area has a 'Refresh' button and an 'Apply' button. The 'Confer Dial Profile Settings' section shows a table with columns for 'Confer Dial Profile Policy', 'Call Context', and 'Ringling TimeOut(in secs)'. The 'Auto Dial Profile Settings' section shows a table with columns for 'Auto Dial Profile Policy', 'Call Context', and 'Ringling TimeOut(in secs)'. Both sections have a 'Set up TimeOut (in secs)' field set to 15.

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

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

Figure: Configured Dial Profile Settings

10.6.2 Users

Here, you can assign and unassign the users to this campaign. This tab has already been explained in the Chat Campaign Settings. [Know more...](#)

10.6.3 Queues

Here, you can create and manage the queues. This tab has already been explained in the Inbound Campaign Settings. [Know more...](#)

10.6.4 Holiday/Office Hours

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

10.6.5 Call Context

Here, you can define the call contexts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.6.6 Routing

Here, you can define the routing policies for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.6.7 Prompt

Here, you can create and manage the Voice Prompts for this campaign. This tab has already been explained in "Interactive Voice Application Campaign". [Know more...](#)

10.6.8 Customer Filter

Here, you can assign and unassign the customer filters in this campaign. This tab has already been explained in "Outbound Voice Campaign". [Know more...](#)

11. 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.

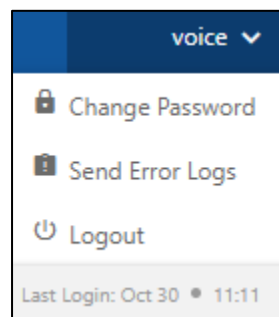


Figure:Voice-Admin Account Menu

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.

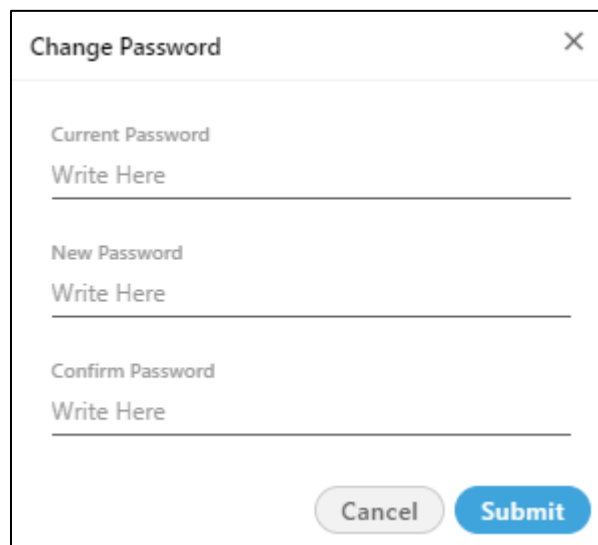
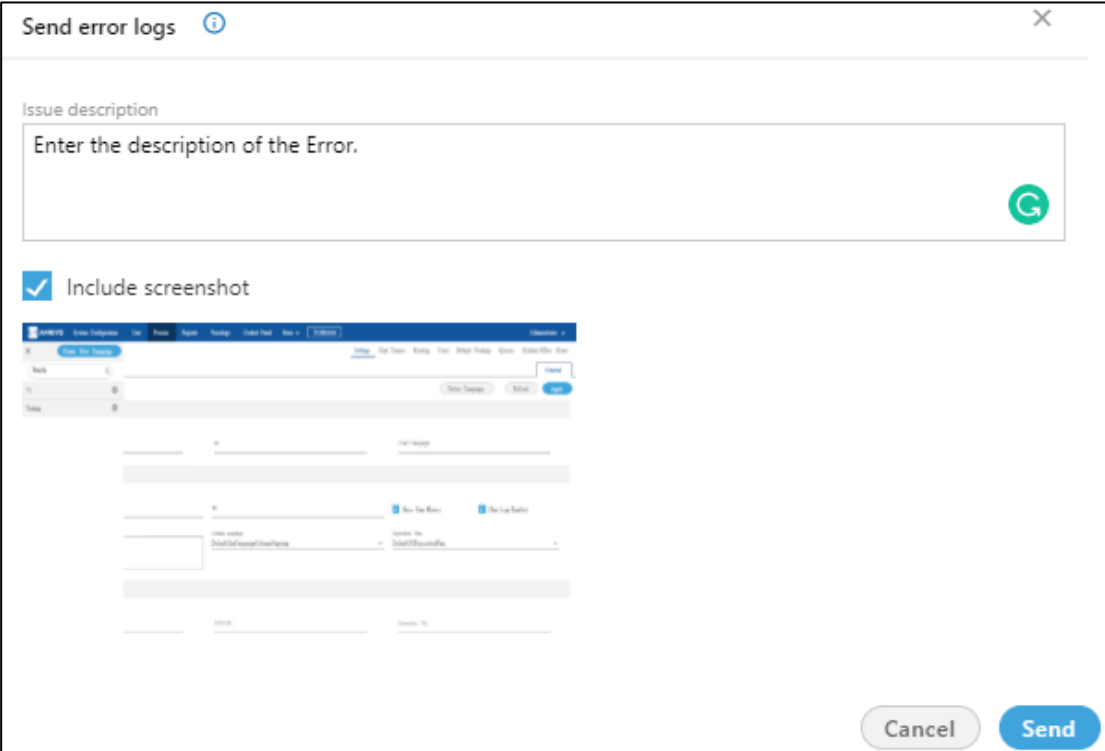


Figure:Change PasswordPop-up

- 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.



The screenshot shows a dialog box titled "Send error logs" with an information icon. It contains a text input field for "Issue description" with the placeholder "Enter the description of the Error." and a green circular refresh icon. Below the input field is a checked checkbox labeled "Include screenshot". Below the checkbox is a screenshot of a web application interface. At the bottom right of the dialog are two buttons: "Cancel" and "Send".

Figure:Send-Error-Logs

- 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.

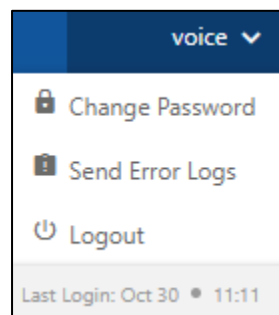


Figure: Logout