Ameyo 4.3

Agent Manual

Abstract

This document introduces to the Agent Manual of Ameyo 4.3 GA.

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1. Login at Ameyo

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

Perform the following steps.

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

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

Replace the following variables.

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

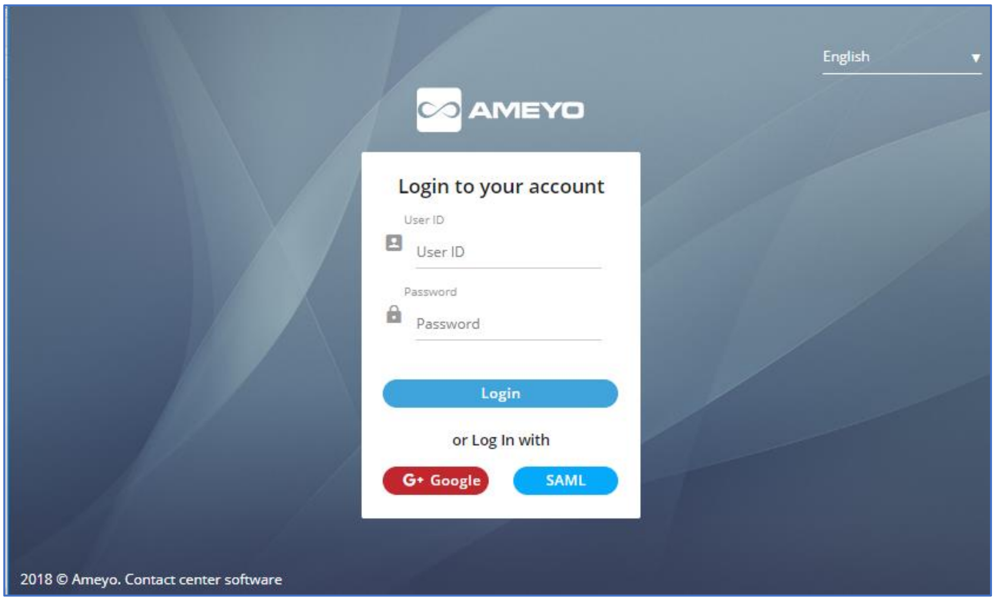


Figure: Login Screen

2. Use any of the following methods to login.

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

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

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

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

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

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

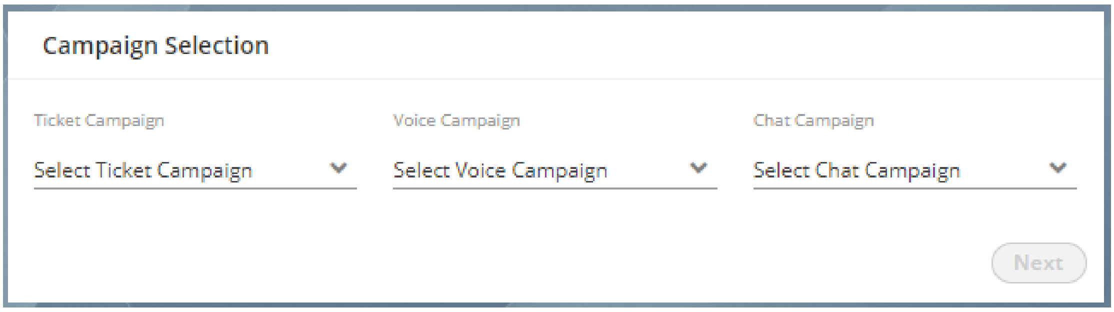


Figure: Select the Campaign

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

   - Ticket (Interaction) Campaign

- Voice Campaign
  - Inbound Voice Campaign
  - Outbound Voice Campaign
  - Parallel Predictive Voice Campaign
- Chat Campaign

Agent can login to these three types of campaigns collectively.

If Administrator have configured the default working for an agent in any campaign, then that agent will be logged in directly to that campaign. Professional Agent can be set to logon to one voice, one chat, and one interaction campaigns. Whereas, Executive can set to work in two voice, one chat, and one interaction campaign.

4. **Blended Campaign:** The Administrator can configure blended campaign, which allow an agent with Executive Role to logon to more than one voice campaigns (such as in both Inbound and Outbound campaigns) simultaneously. If this option is configured, a checkbox named "Blended Campaign" appears in the campaign selection.

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

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

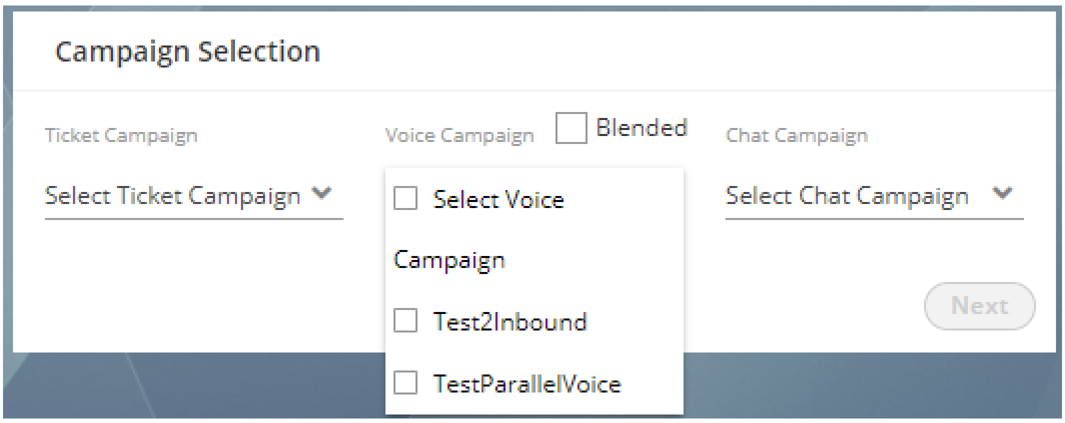


Figure: Campaign Selection

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

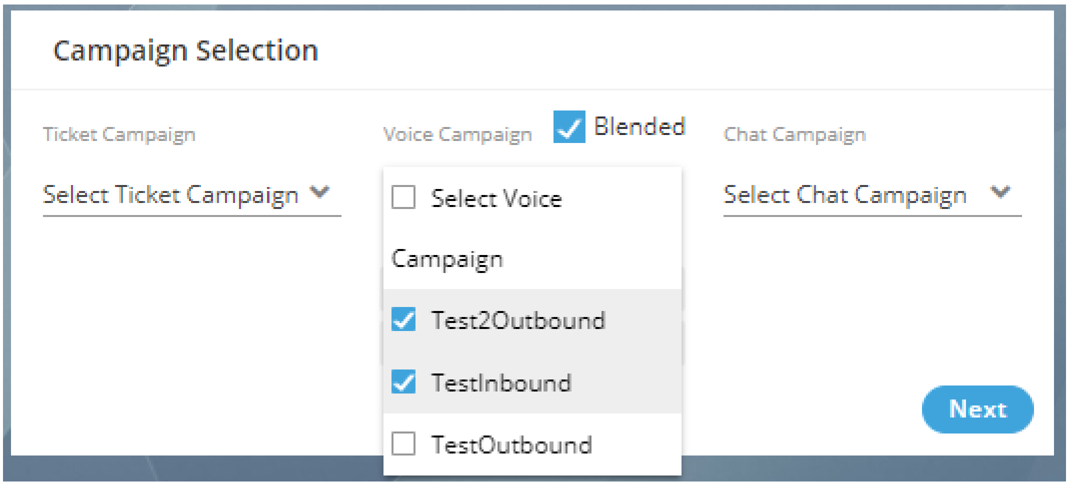


Figure: Selecting Blended Campaigns

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

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

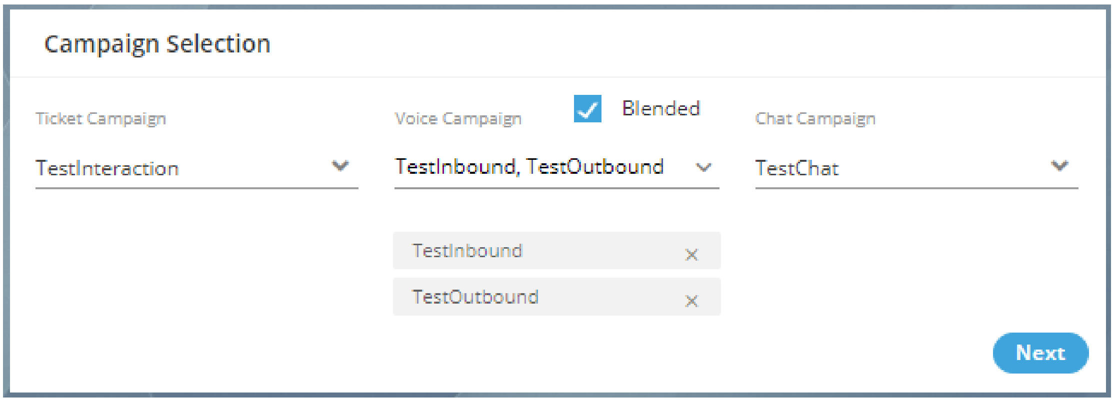


Figure: Selected the Campaigns

5. Click "Next" to proceed. If there are multiple extension in the selected voice campaign, the following pop-up is displayed.

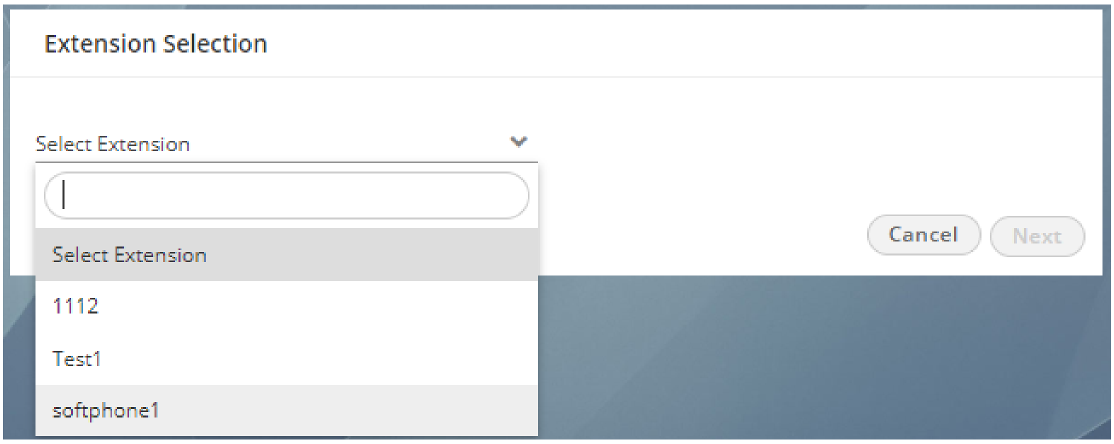


Figure: Extension Selection

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

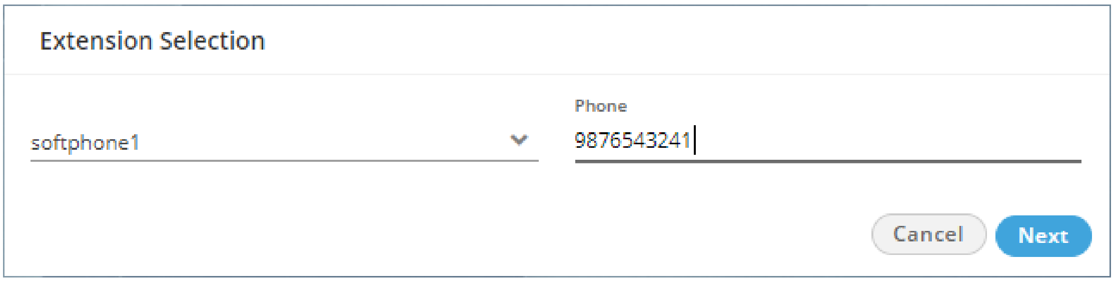


Figure: Entering Number after selecting Extension

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

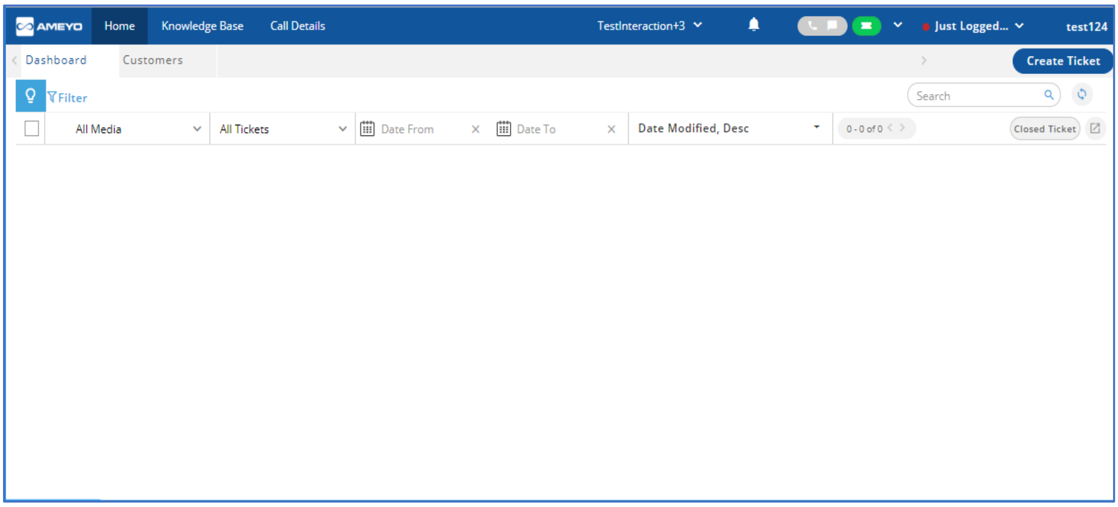


Figure: Home Screen

2. Ticket Creation

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

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

First time, the customer information has to be provided. After that, the tickets for the same customer information will be aligned with the same customer ID.

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

2.1 Customer Information

Whenever a ticket is being created for the first time for a new customer, all customer information fields will remain blank.

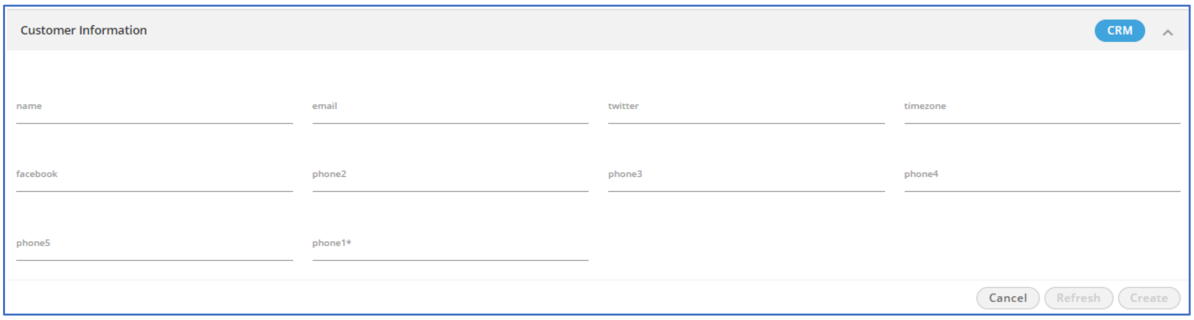


Figure: Customer Information

Provide the inputs for the following fields.

1. Name
2. Email
3. Twitter

4. Timezone
5. Facebook
6. Phone 1
7. Phone 2
8. Phone 3
9. Phone 4
10. Phone 5

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

2.2 New Ticket for Interaction Campaign

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

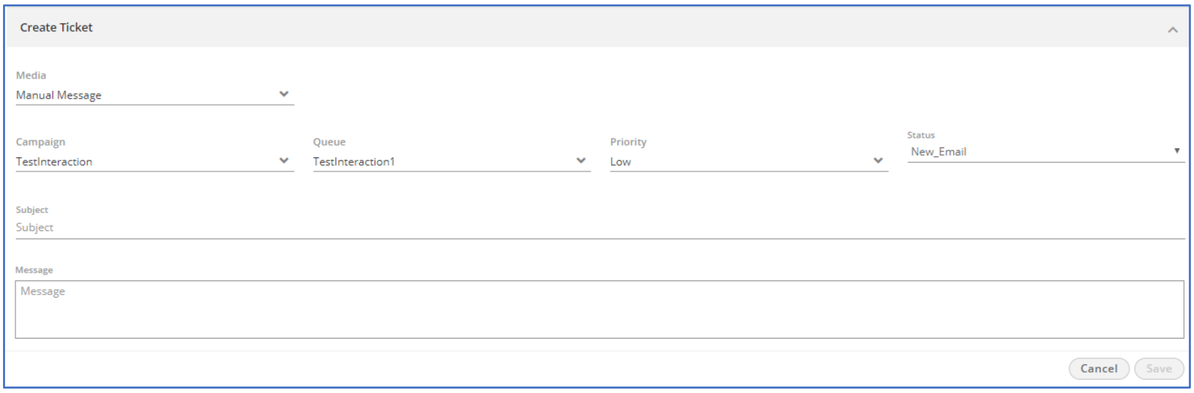


Figure: New Ticket Creation

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

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

1. Select "Manual Message" as the media.
2. Select the campaign and the queue.

3. Select the priority of the ticket from any of the following values.
    - Low
    - Medium
    - High
4. Select a status of the ticket.
5. Provide a subject.
6. Enter the manual message.

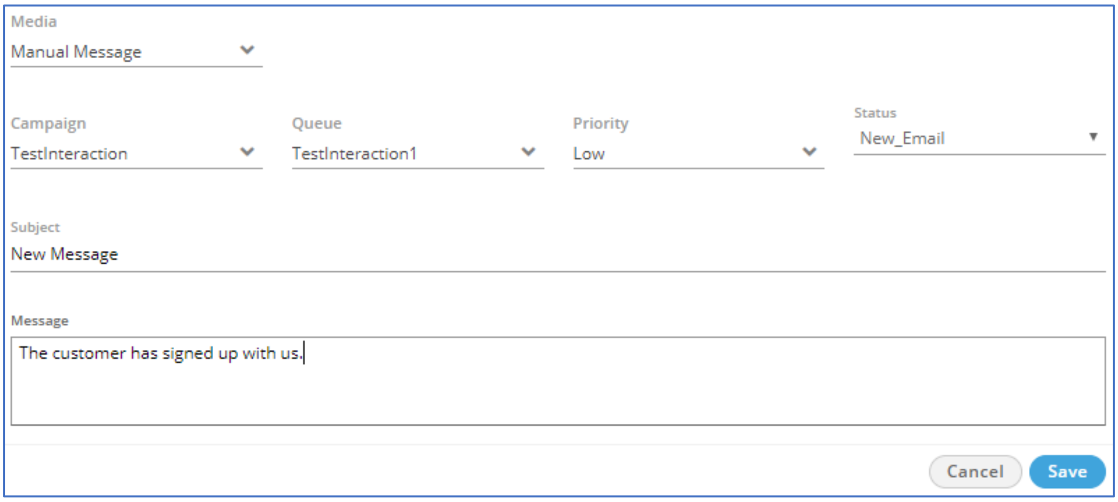


Figure: New Ticket with Manual Message

7. Click "Save”. A new ticket is created and displayed in the customer information.

3. Ticket Operations

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

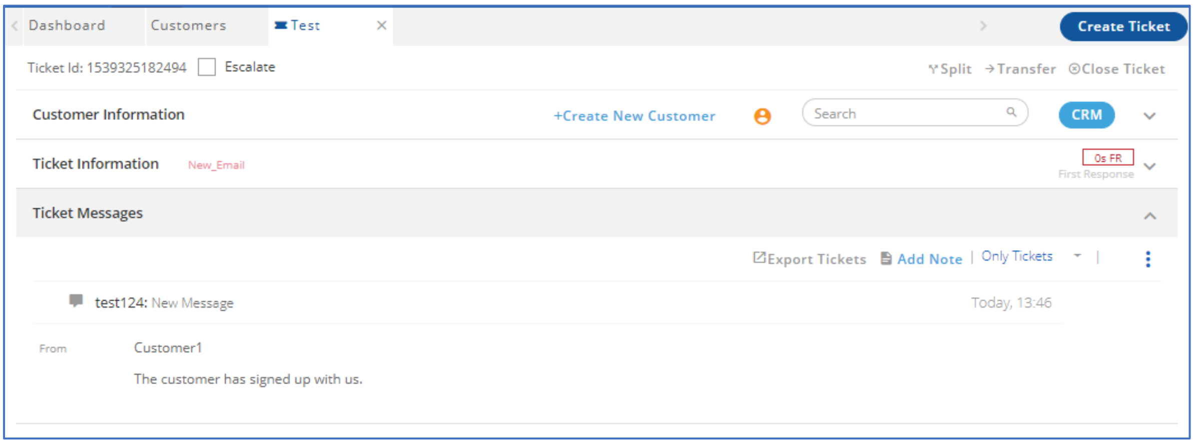


Figure: New Ticket with Manual Message

This page can be divided into the following sections..

3.1 Ticket Information

The top row in the ticket shows the Ticket ID on the top left corner and contains the following options.

3.1.1 Escalate

Click "Escalate" checkbox to escalate this ticket. The ticket will remain unassigned and is displayed with the red flag in the dashboard of the agents.

After escalating the ticket, it is required to close the ticket with "Escalate" disposition.

Here, the agent can also split and transfer the ticket.

3.1.2 Close Ticket

Click "Close Ticket" to close the ticket. It shows the following pop-up.

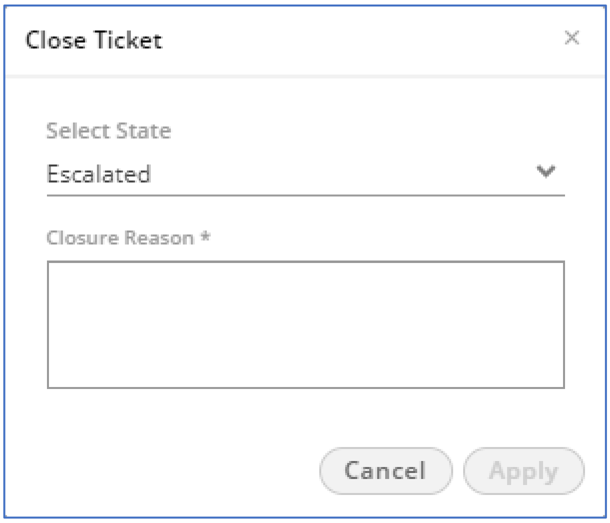


Figure: Close Ticket

Select a disposition and provide a closure reason. Click "Apply" to close the ticket.

3.2 Customer Information

Click "Customer Information" to view the customer information.

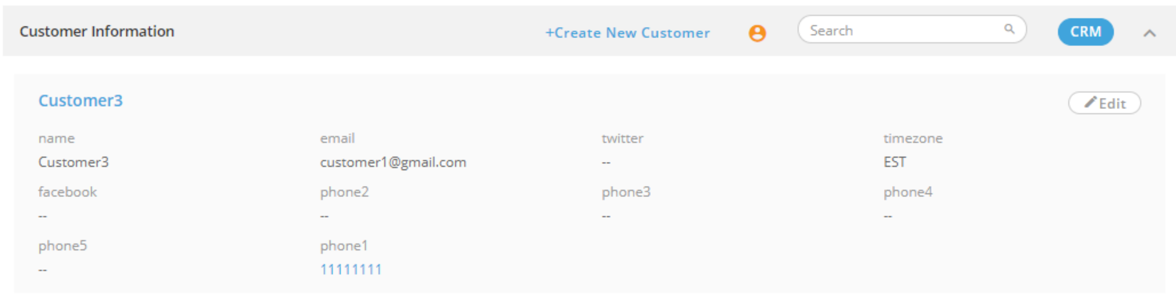


Figure: Customer Information

Here, you can perform the following operations.

3.2.1 Edit

Click "Edit" to edit the customer information.

3.2.2 Create New Customer

If this is a new customer, click "+Create New Customer" to create a new customer. It shows the customer information fields. Know more...

If you create a new customer, the ticket will be aligned with that customer.

3.2.3 View Customer Cards

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

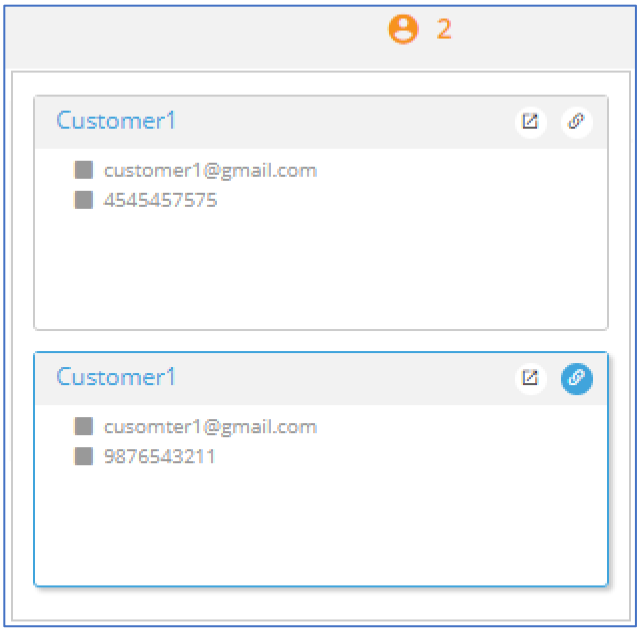


Figure: Customer Cards

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

3.2.4 CRM

Click "CRM" to call the CRM to view more details.

3.3 Ticket Information

Click "Ticket Information" to view the information of the ticket.

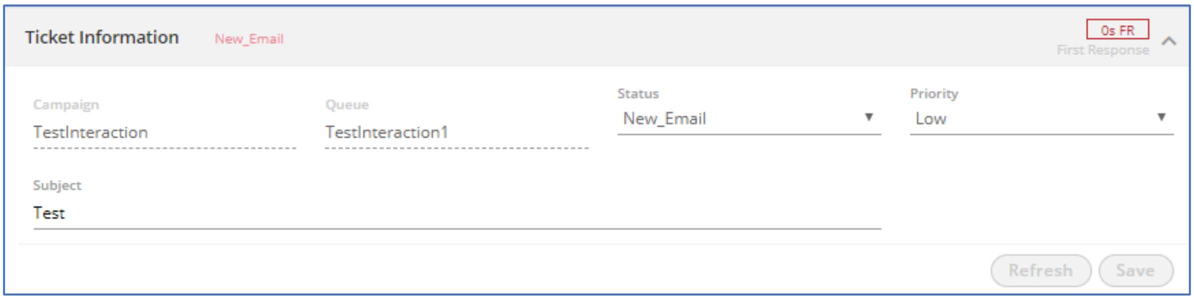


Figure: Ticket Information

It shows the information of the ticket like its campaign, queue, status, priority, and subject. If it is the first ticket created for a customer, "First Response" label is displayed in the right corner with the time interval within which the First Response is delivered.

Here, you can change the status, priority, and subject of the ticket.

3.4 Ticket Messages

Click "Ticket Messages" to view the ticket messages. It shows all messages interacted with the customers. Here, the agent can perform the following operations.

3.4.1 Export Tickets

Click "Export Tickets" to export the tickets. The tickets will be saved in a zip file, which will contain one PDF file for one ticket. Click it, select the location where you want to save the zip file, and click "Save".

3.4.2 Add Note

Click "Add Note" to add a public note to the ticket. It shows the following fields.

Figure: Add Note

Provide a subject and description. Click "Save" to save the note. This note will be visible to all other users.

3.4.3 View Settings

Click "All" to access the drop-down menu to modify what you want to see in the Ticket Messages.

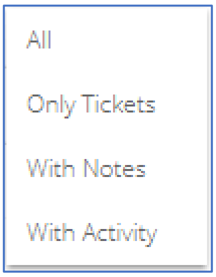


Figure: View Settings

You can select any of the following options.

- **All:** Select it to all details including manual messages, tickets, and any changes made to the tickets.
- **Only Tickets:** Select it to view only tickets. It will hide non-ticket details such as changes made to information of a ticket.
- **With Notes:** Select it to view only those tickets which have notes.
- **With Activity:** Select it to view only those tickets which has activities.

3.4.4 Other Options

Agent can click ⋮ to access other options such as "Reply Via". You can click it to reply to the customer on the selected ticket through the selected media in the sub-menu.

4. Dashboard

In the agent interrace, the Dashboard shows all tickets created while interacting with the customers through any medium.

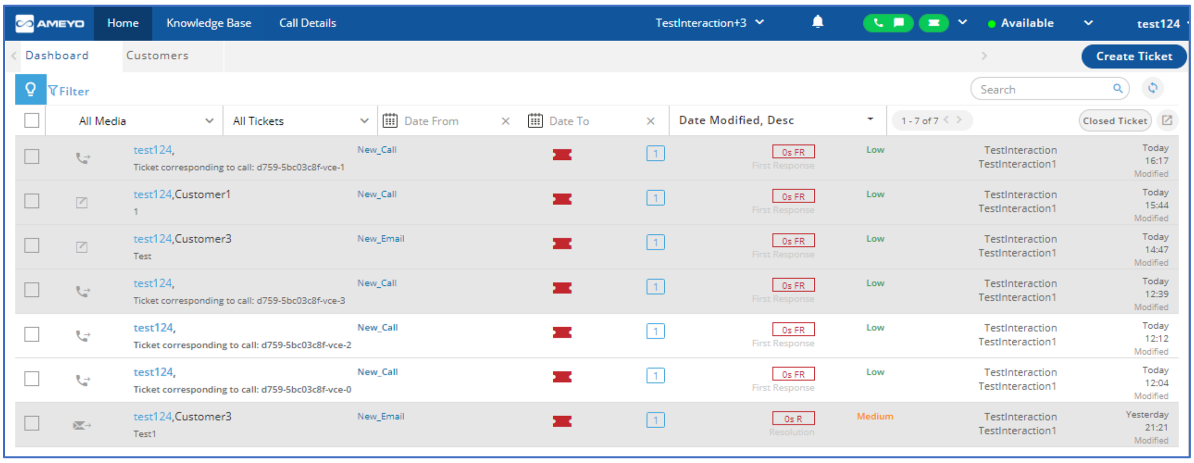


Figure: Dashboard

Here, the agent can perform the following operations.

4.1 Smart Mode

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

4.2 Filter

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

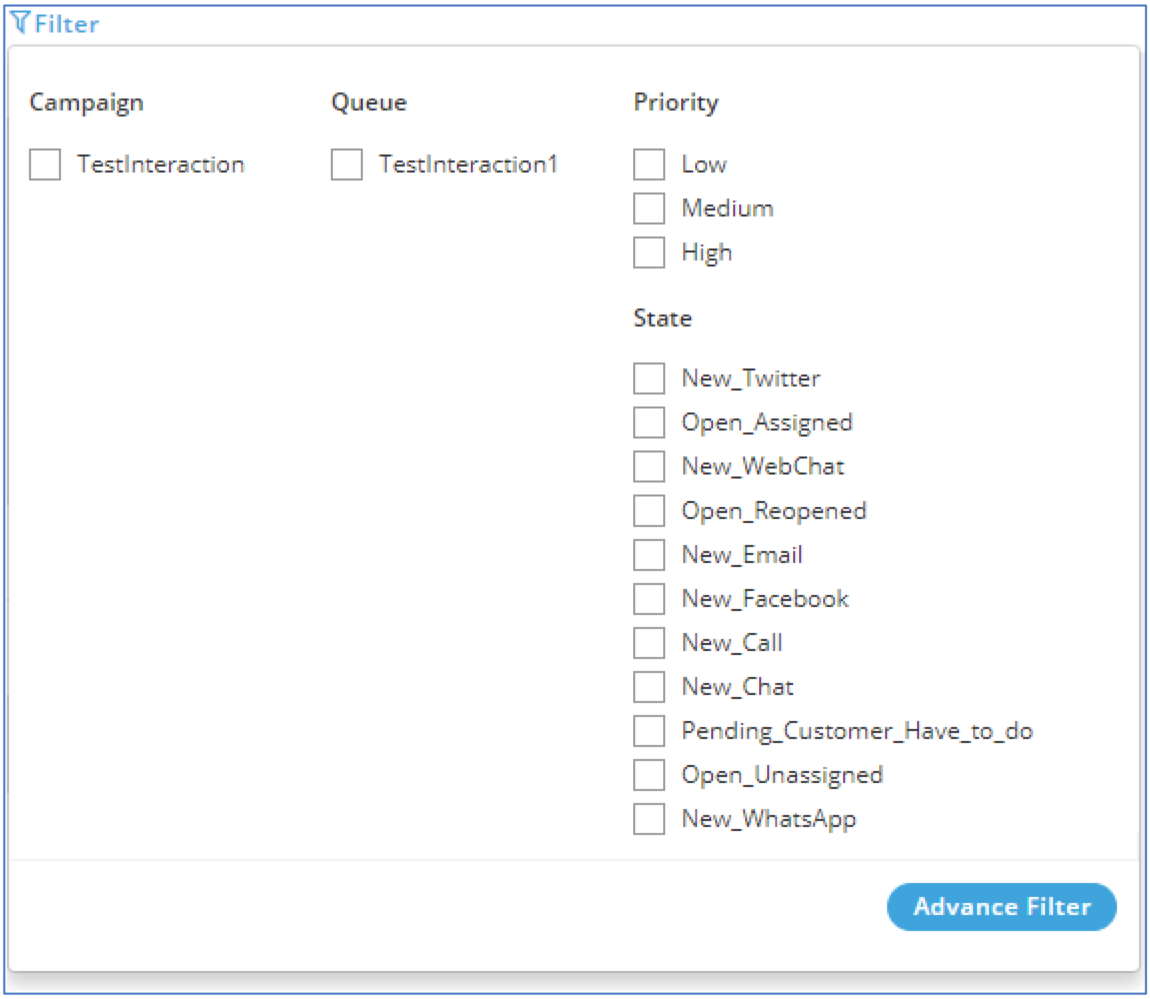


Figure: Filter Box

You can filter the tickets as per their campaign, queue, priority, and ticket state. You can click "Advanced Filter" to create an advanced filter.

4.3 Search Tickets

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

4.4 Refresh

Click icon to refresh the view of the dashboard.

4.5 Row Filter

The very first row of the tickets in Dashboard contains the filters. The agent can configure this filter to view the relevant tickets.

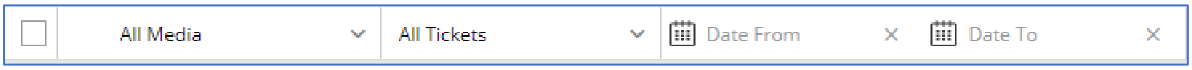


Figure: Filter Row

The agent can filter the tickets as per the selected media, date created period, date modified period.

4.6 Sorting

You can click the drop-down menu along with the filter row to sort the list of tickets.

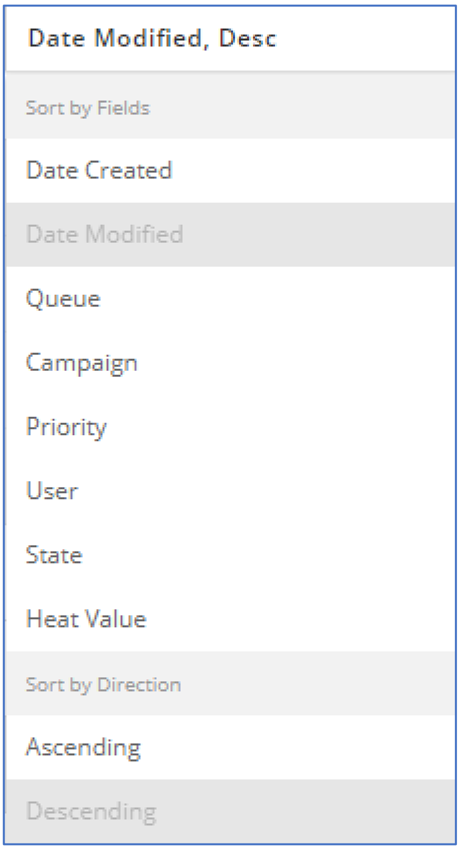


Figure: Sort

Select any of the available sorting criteria and select "ascending" or "descending" sorting direction in this menu.

4.7 View Closed Tickets

Click "Closed Tickets" button to view those tickets, which has been closed, in a separate tab.

4.8 Export List of Tickets to a CSV

Click icon to export the list of all or selected tickets to a CSV file, which will be saved on the disk.

4.9 Pick

Agent can select an unassigned ticket and click "Pick" to pick that ticket.

4.10 Transfer

Agent can select one or multiple tickets and click "Transfer" to transfer the ticket using the following pop-up.

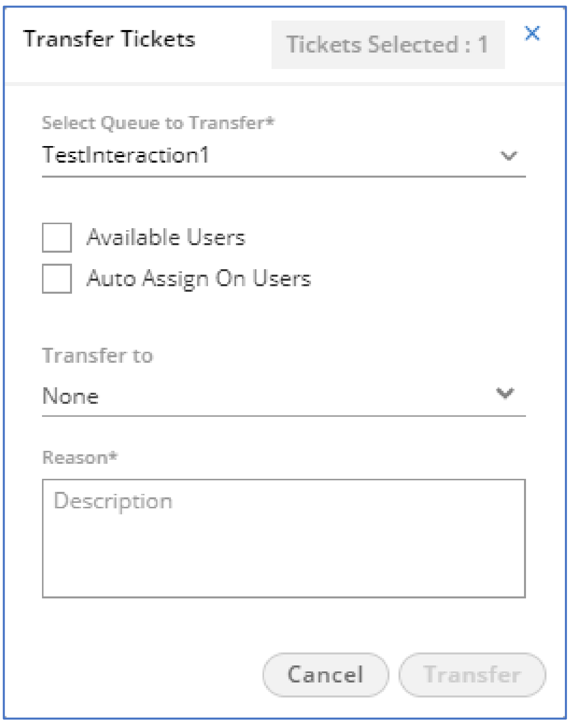


Figure: Pop-up to transfer the ticket.

Here, perform the following steps to transfer a ticket.

1. Select the queue to which you want to transfer the ticket.
2. Select "Available Users" if you want to transfer the ticket to the available users. Once checked, "Transfer to" drop-down menu will list only those users who are available or who have sufficient bandwidth to take the ticket.
3. Select "Auto Assign On Users" to auto-assign the further communications received on the ticket to the user to whom this ticket is being transferred.
4. Select the user in "Transfer to" drop-down menu.
5. Provide a reason for this ticket transfer.
6. Click "Transfer" to transfer the ticket.

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

4.10.1 Split Ticket

Select a ticket and click "Split" to split this single ticket into two new tickets. It shows the following pop-up.

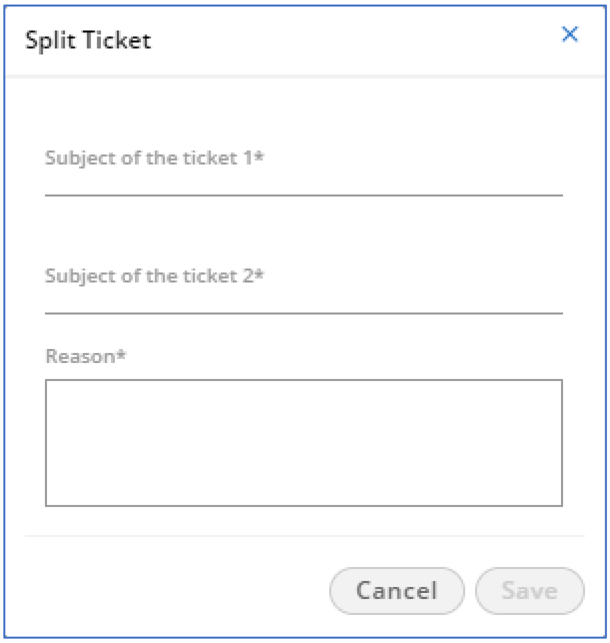


Figure: Split Ticket

Enter the subjects of both tickets and provide a reason. Click "Save" to split the ticket. One ticket will be assigned to the agent by default. If the agent has the bandwidth, the ticket will be assigned to it else the ticket will remain unassigned.

4.10.2 Merge Ticket

Select more than tickets and click "Merge" to merge multiple tickets into one ticket using the following pop-up.

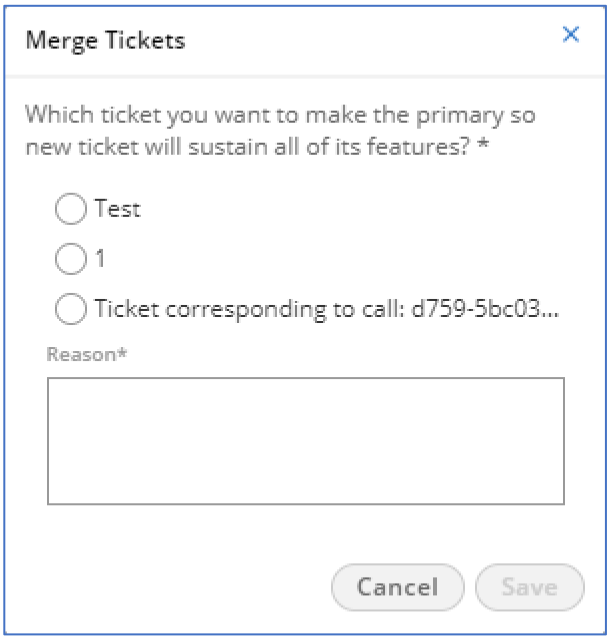


Figure: Merge Multiple Tickets to One

Select the primary ticket into which other tickets will be merged. Provide a reason to merge the tickets. Click "Save" to merge the tickets.

5. Mange Customers

Customer Tab in the Agent Interface shows the list of customers.

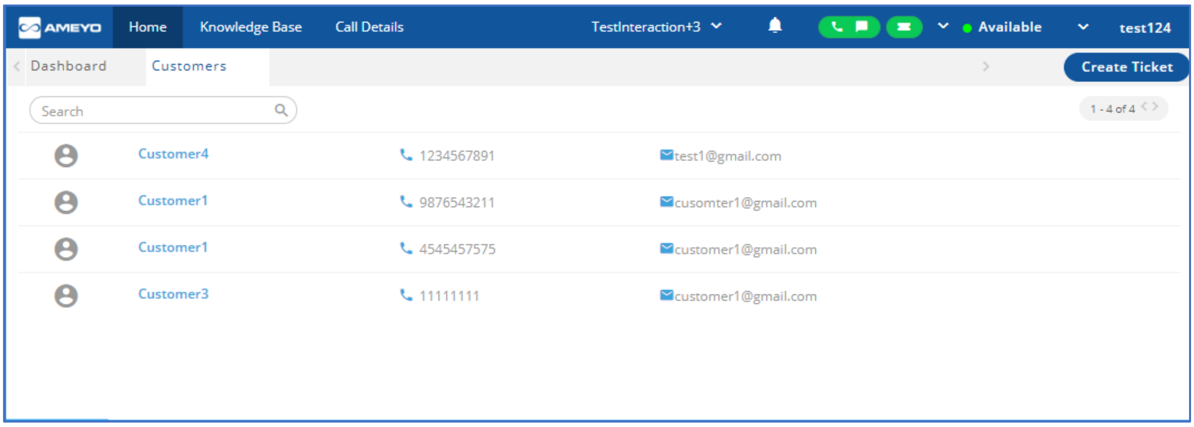


Figure: List of Customers

Each customer is listed in an individual row. You can either click the customer name or anywhere in that row to see the customer details in a separate tab.

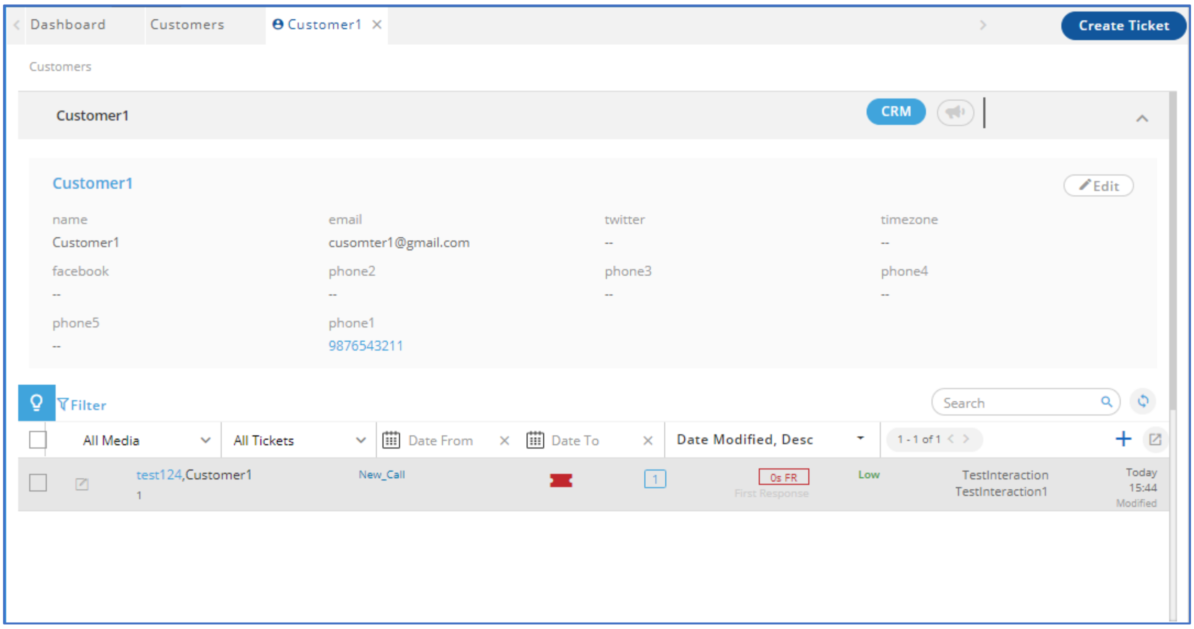


Figure: Customer Information

Customer Information is displayed on the top. The agent can edit it, if required. The bottom section shows the tickets created for this customer. This area has the same operations, which can be performed on the Dashboard.

The agent can click any ticket to open its details in a new tab. The agent can also click "+" to create a new ticket for the customer.

6. Customer Communication

6.1 Manage Customer Communications

If the agent is logged on to the Interaction, Chat, and Voice campaigns, then the agent can manage following types of communications with the customers. Click the links to know more about them.

- **Email**
- **Chat**
- **Voice**

6.2 Email Communication with Customer

Whenever an email is sent or received from the registered email address of a customer, a new ticket is created.

6.2.1 Sent a New Email to Customer

Select a customer from "Customers" tab to open customer's information in a new tab. Click "+" icon in the right corner of the bottom section header to create a ticket. Rather, the agent can click "Create Ticket" to create a blank ticket and fill the customer details.

While creating a ticket, select "Email" to send a new email to the customer and create a new ticket for this new communication being sent to the customer.

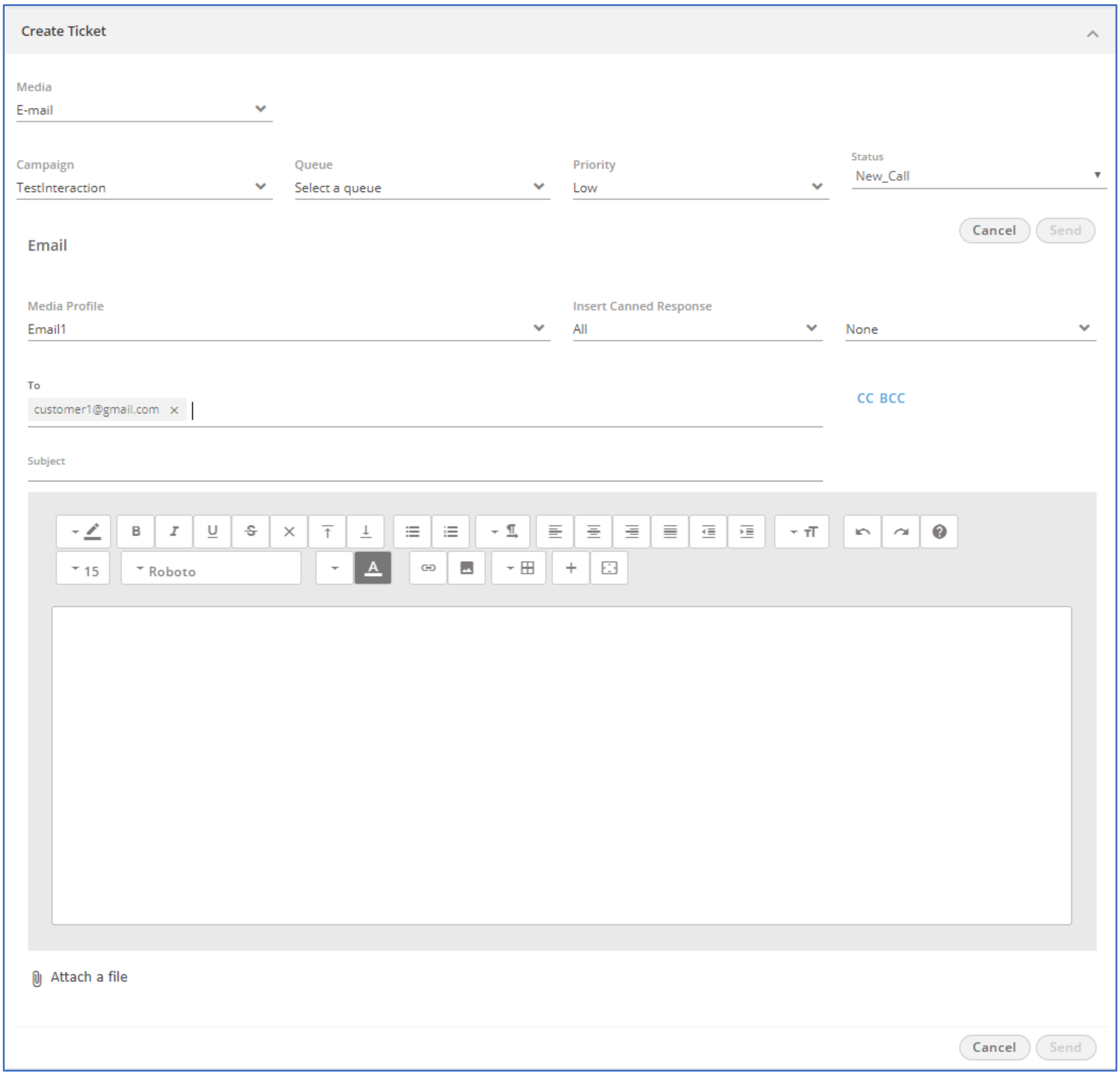


Figure: Sending New Email

Perform the following steps.

1. Select "Email" as media.
2. Select the campaign and the queue.
3. Select the priority of the ticket.
4. Select the status of the new ticket.
5. Select any Email media profile in "Media Profile" drop-down menu.
6. If you want to insert the canned message, select its category in "Insert Canned Response" drop-down menu, and select the require canned message. You can skip this step, if you do not want to use the canned messages.

7. "To" field already has the email address of the customer. You can remove that email address and type another email address, if required.
8. If required, click "CC" to add the CC field and provide the recipient address that you want to keep in the CC.
9. If required, click "BCC" to add the BCC field and provide the recipient address that you want to keep in the BCC.
10. Provide a subject.
11. In the message body, you can type the message and keep the canned message, if you have inserted. You can use the available tools to format the text, to insert a link, and to insert the images, if required.
12. Click "Attach a file" if you want to attach a file.

    Click "Send" to send the email. After sending the email, a new ticket will be created.

6.3 Chat Communication with Customer

The Chat Communication is available for the following mediums.

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

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

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

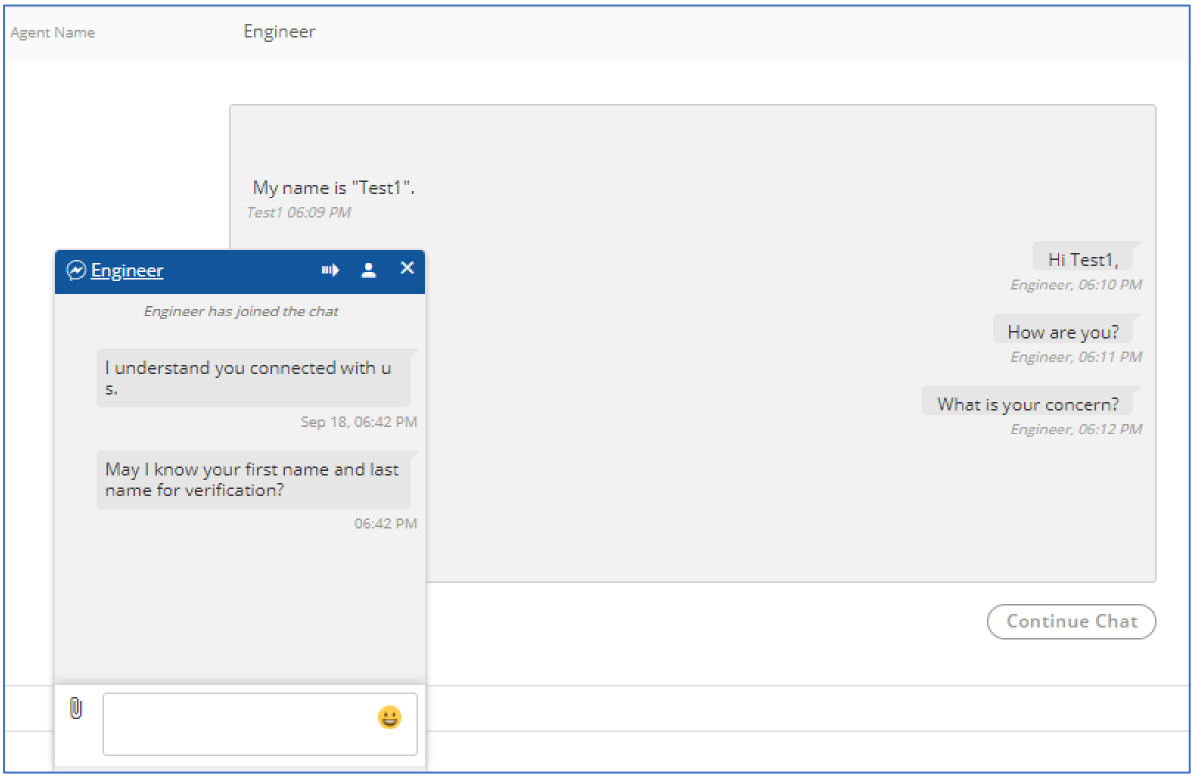


Figure: New Ticket through Chat

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

6.3.1 Displaying Name of Agent to the Customer

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

6.3.2 Customer Name is Clickable

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

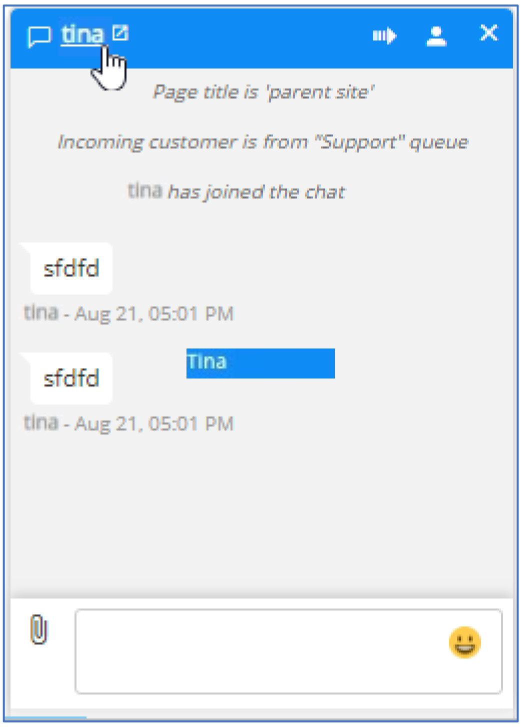


Figure: Customer Name is clickable

6.4 Voice Communication

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

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

- **Inbound Call**
- **Outbound Call**
  - Outbound Click to Call
  - Outbound Manual Dial Call
  - Manual Preview Dial Call
  - Auto-dial Outbound Call

6.4.1 Inbound Call

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

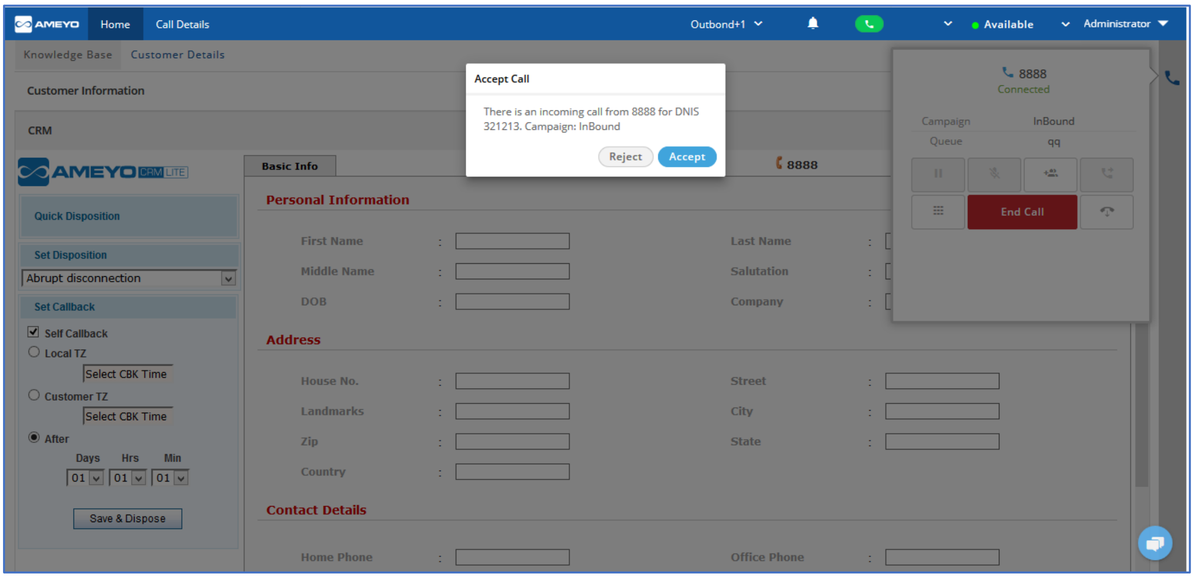


Figure: Call Notification

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

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

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

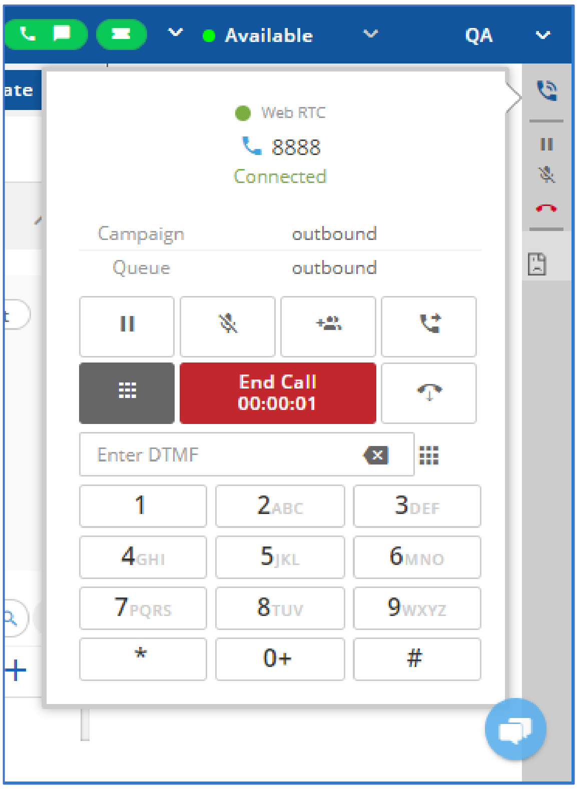


Figure: Agent Communicating with the Customer on Incoming Call

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

After the call, the agent has to dispose the call.

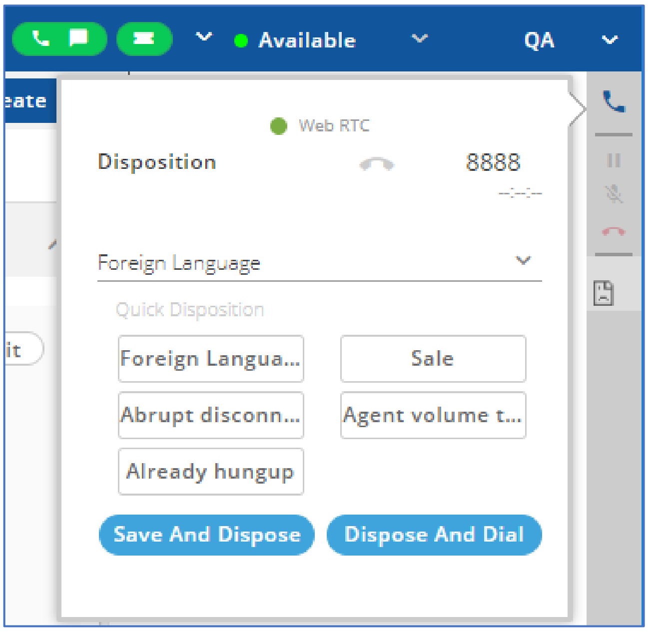


Figure: Dispositions for an Incoming Call

The agent can select the disposition through the drop-down menu or select any of the on-screen displayed quick dispositions. Click "Save and Dispose" to dispose the ticket associated with the call.

Whereas, the agent can click "Dispose and Dial" to dispose the current call ticket and continue to make a manual dial call. It shows a textbox, where the agent can type the number to be dialled.

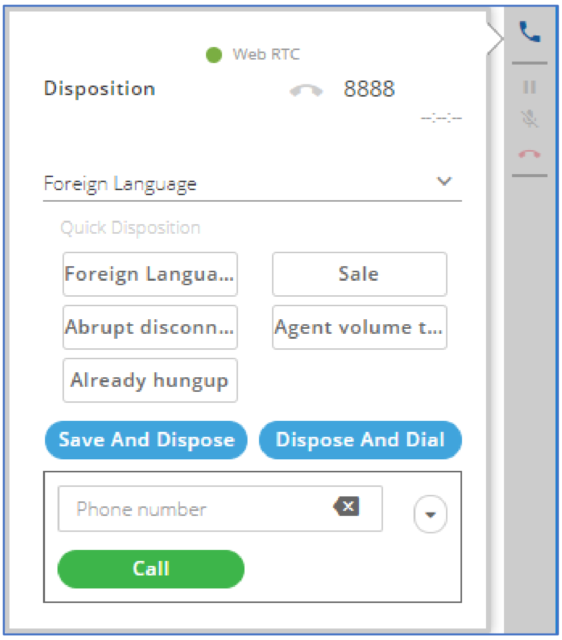


Figure: Dispose and Dial

After entering the number, click "Call" to dispose the current call with the selected disposition and make a new outbound call with manual dial.

Administrator can define the call dispositions for the incoming (inbound) calls in the Inbound Campaign Settings.

6.4.2 Outbound Call

6.4.2.1 Outbound Call to the Customer

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

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

6.4.2.2 View Customer Information and Click to Call

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

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

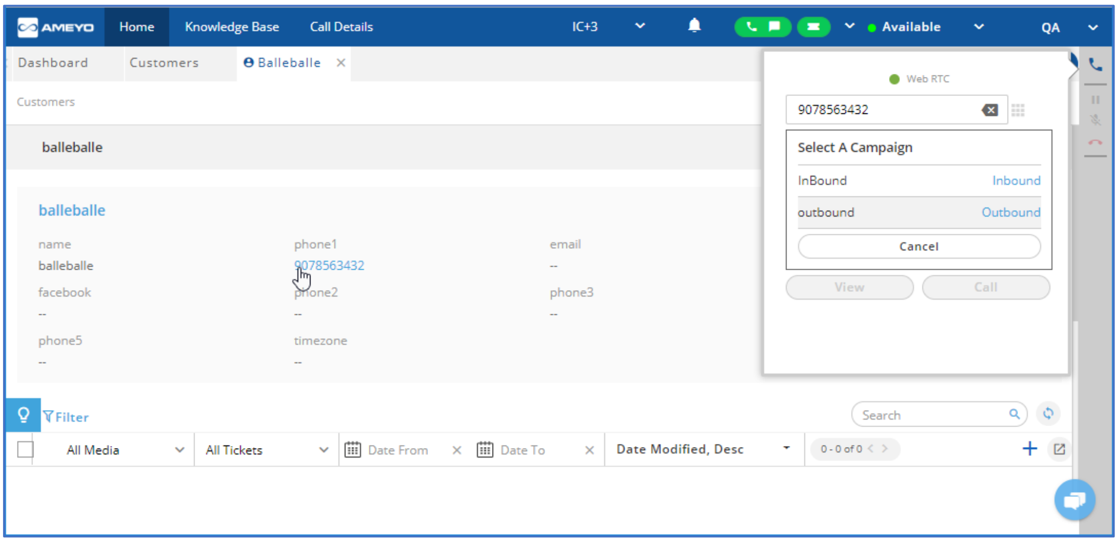


Figure: Calling a Customer through Customer Information

2. Click the number. A pop-up slides from the left side that contains the Ameyo's WebRTC dialer.

3. If there are multiple campaigns to facilitate outbound calls, the WebRTC dialer lists them and the agent has to select a campaign.

After selecting the campaign, the call is connected and the dialer starts to dial the customer's number.

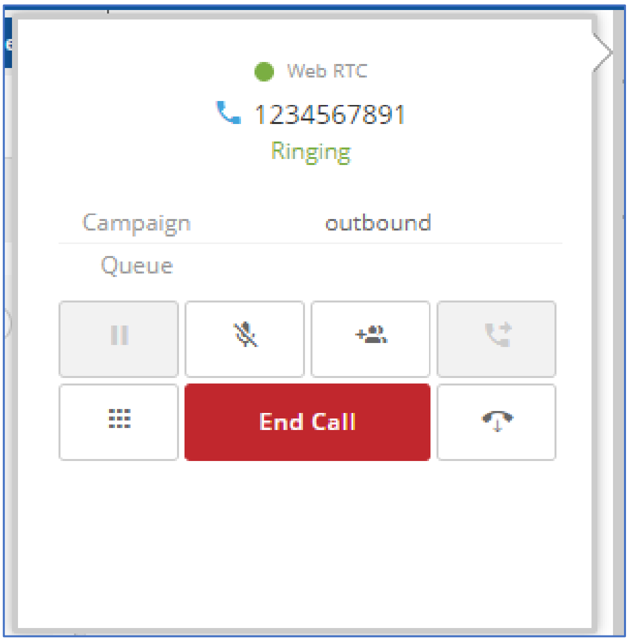


Figure: Calling a Customer

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

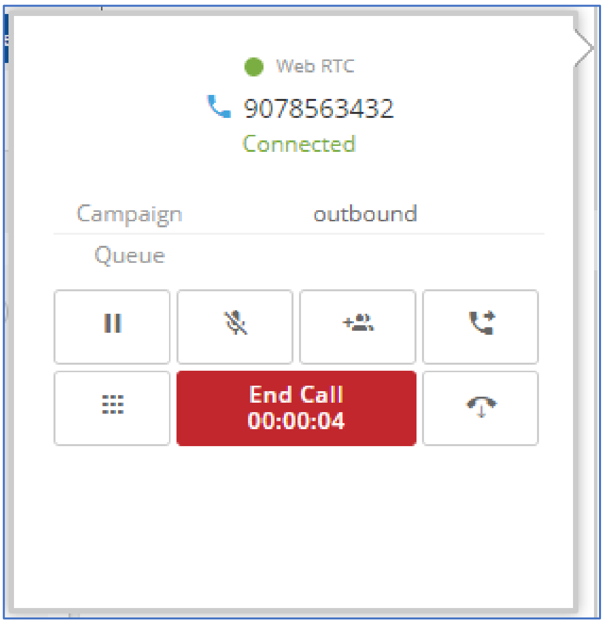


Figure: Ongoing Outbound Call

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

5. The customer can disconnect the call after completing the task. However, the agent can also click "End Call" button to end the call abruptly.
6. After the call is finished, the call dispositions are displayed in the WebRTC dialer.

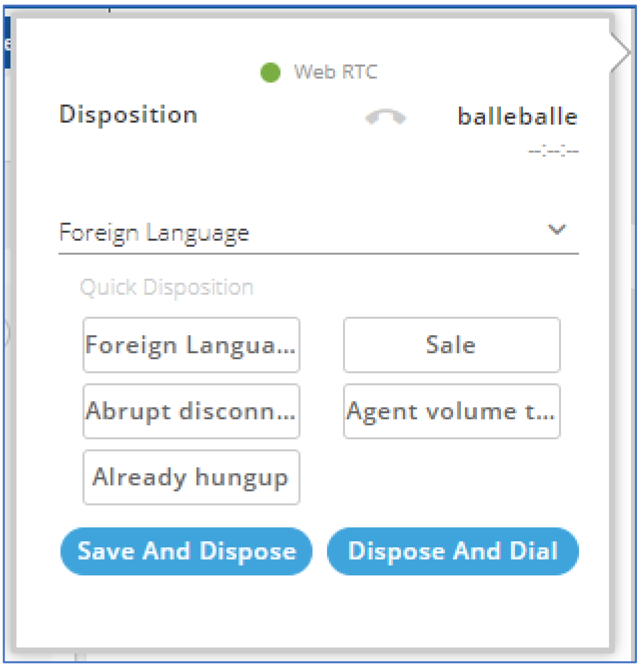


Figure: Dispositions of an Outbound Call

7. The agent can select the disposition through the drop-down menu or select any of the on-screen displayed quick dispositions. It contains the following two options.
   - **Save and Dispose:** Click it to dispose the ticket associated with the call using the selected disposition.
   - **Dispose and Dial:** Click it to dispose the current call ticket and continue to make a manual dial call. It shows a textbox in the WebRTC at the bottom.

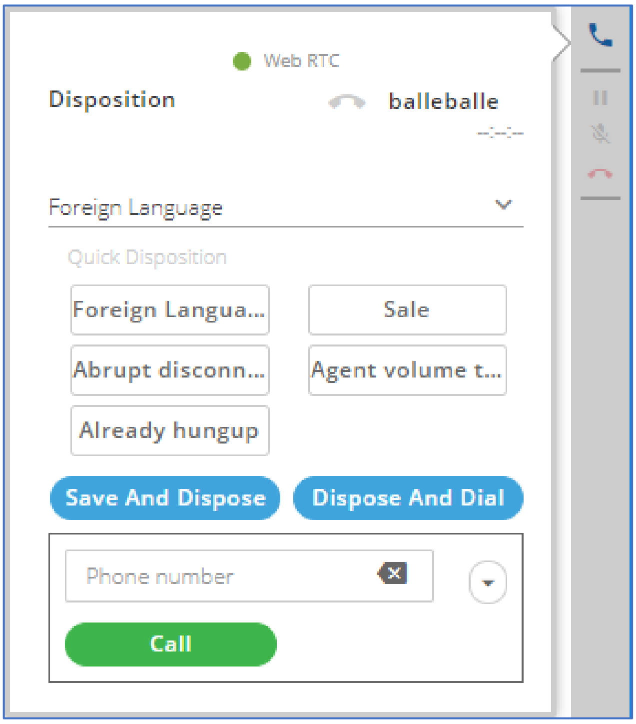


Figure: Continue to Manual Dial after Disposing Current Call

After entering the number, click "Call" to dispose the current call with the selected disposition and make a new outbound call with manual dial.

8. Administrator can define the call dispositions for the outgoing (outbound) calls in the Settings of Inbound, Outbound Campaign, and Parallel Predictive Campaign. The dispositions for incoming and outgoing calls in an Inbound Campaign will be same.

6.4.2.3 Make a Manual Dial Call

Perform the following steps to make a manual dial call.

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

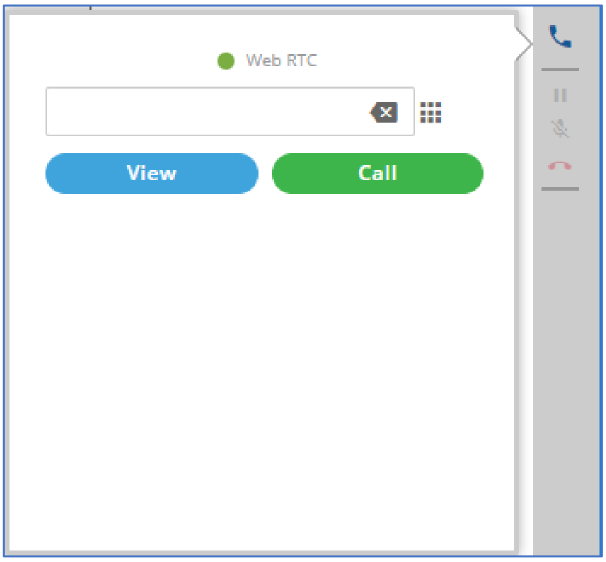


Figure: Manual Dial

2. Click icon to show the numeric keypad.

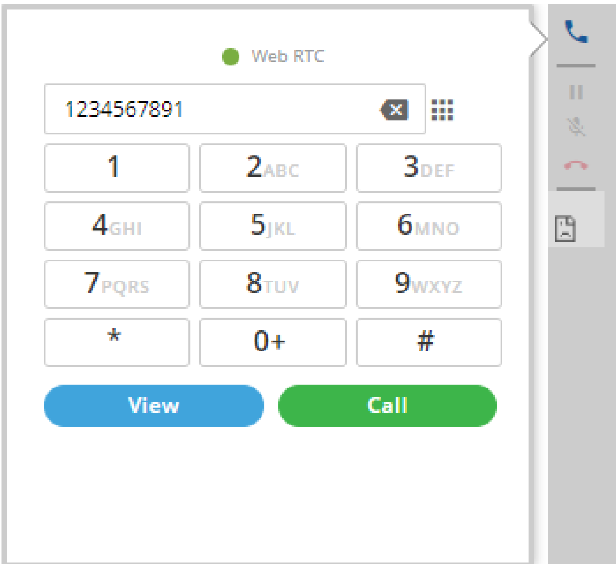


Figure: Numeric Keypad

3. The agent can either type the number through keyboard or this numeric keypad to punch the number.
4. After entering the number, the agent can click "Call" button to dial it.
5. In case of multiple campaigns, the WebRTC dialer lists them and the agent has to select a campaign.

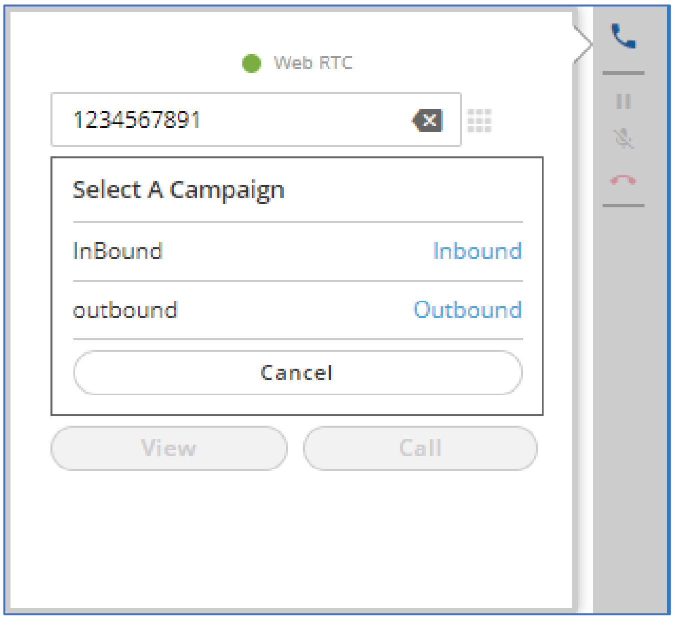


Figure: Campaign Selection

6. If the number is registered, the customer information is displayed on the screen instantly.
7. If the number is not registered in the system, the following pop-up is displayed on the screen.

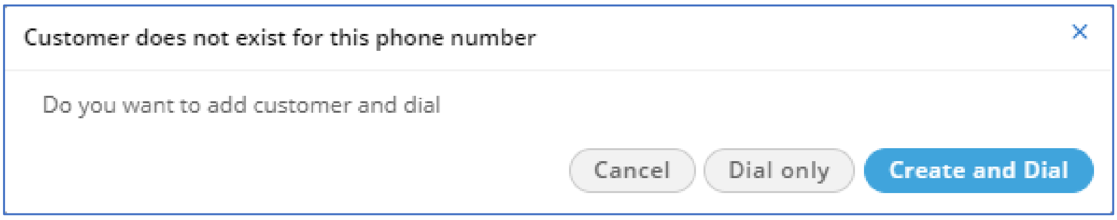


Figure: Calling Manually to a New Number

It contains the following two options.

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

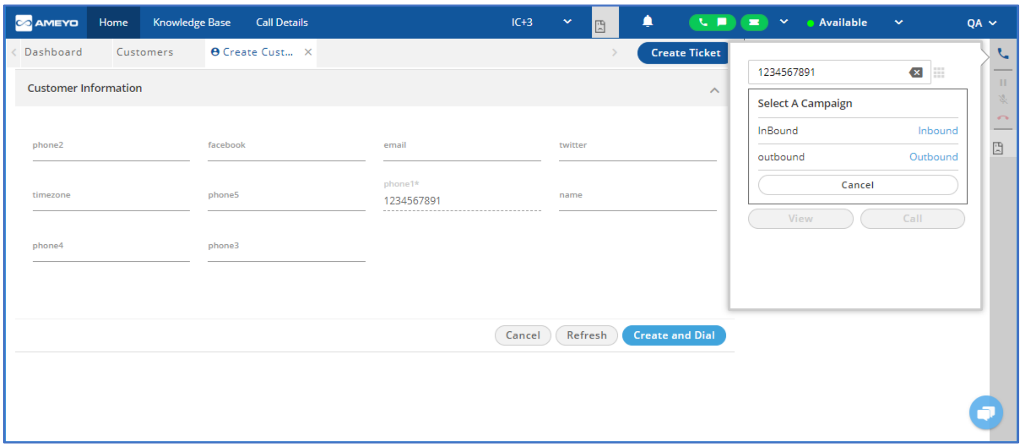


Figure: Create and Dial

Here, you have to provide the following inputs.

- Name
- Phone 2
- Phone 3
- Phone 4
- Phone 5
- Time zone
- Twitter
- Facebook
- Email

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

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

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

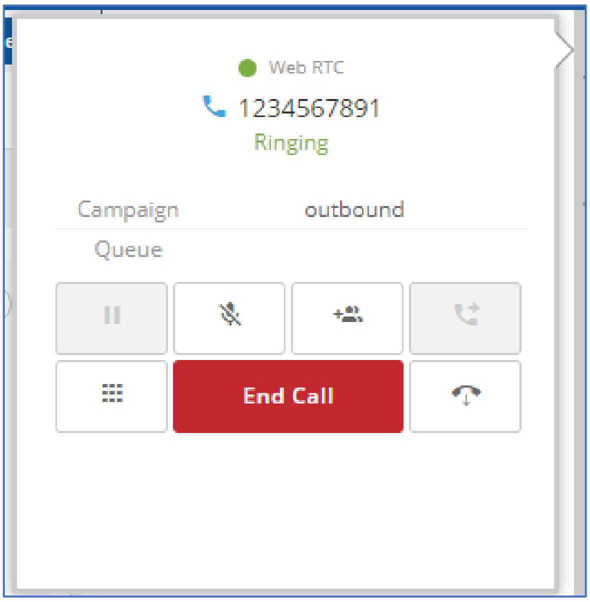


Figure: Calling a Customer

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

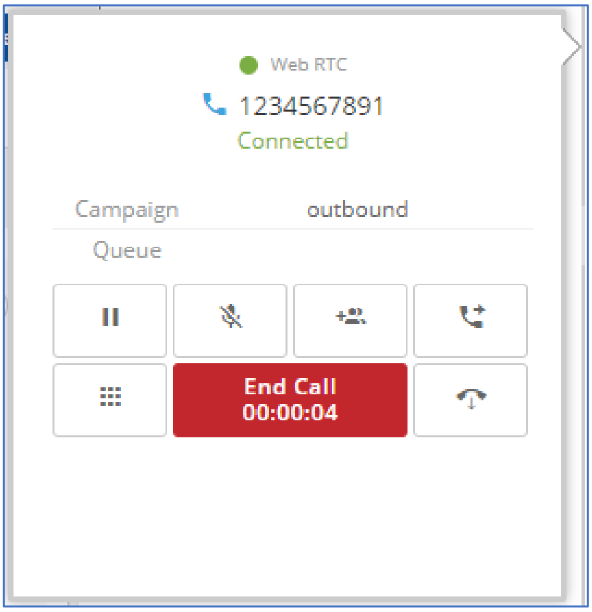


Figure: Ongoing Outbound Call

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

10. After the call is finished, the call dispositions are displayed in the WebRTC dialer.

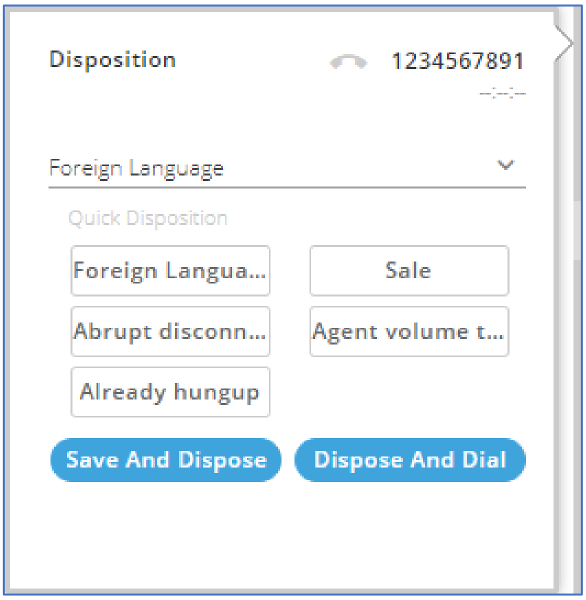


Figure: Dispositions of an Outbound Call

11. The agent can select the disposition through the drop-down menu or select any of the on-screen displayed quick dispositions. It contains the following two options.

   - **Save and Dispose:** Click it to dispose the ticket associated with the call using the selected disposition.

   It is the recommended way if you are dialling a new customer without using "Create and Dial" option as you get the option to create the customer while disposing the ticket.

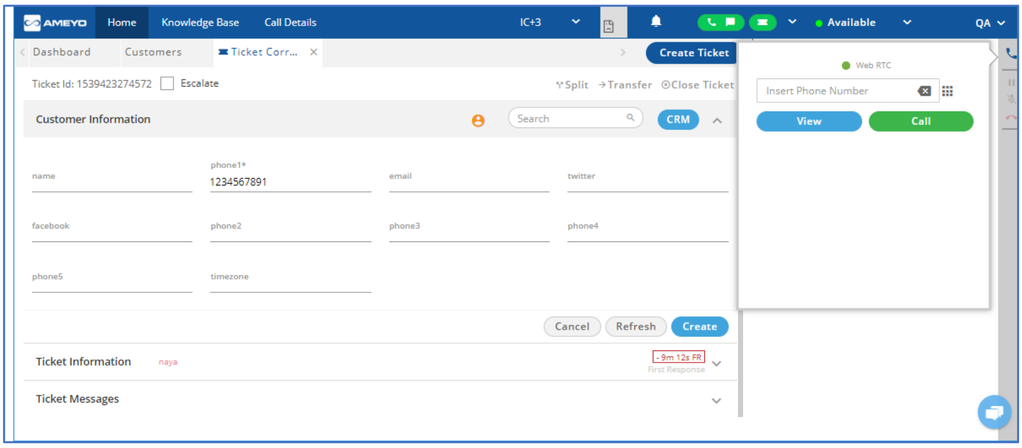


Figure: Create Customer and Dispose Ticket

After providing the inputs, click "Create" to create the customer. The associated ticket has already been disposed with the disposition, that you have selected in the WebRTC dialer.

- **Dispose and Dial:** Click it to dispose the current call ticket and continue to make a manual dial call.

It is the not recommended way when you are dialling a new customer with "Dial Only" option as this option will not let you create the mew customer and dispose the ticket directly.

It shows a textbox in the WebRTC at the bottom.

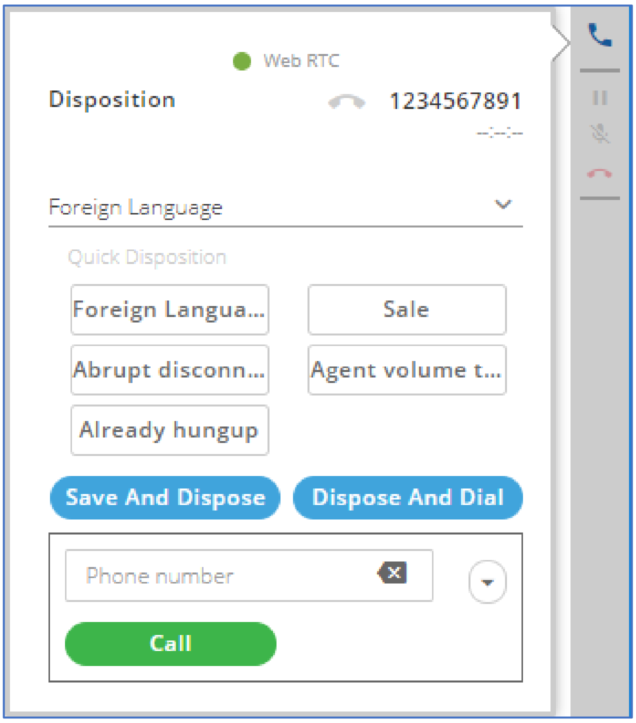


Figure: Continue to Manual Dial after Disposing Current Call

After entering the number, click "Call" to dispose the current call with the selected disposition and make a new outbound call with manual dial.

6.4.2.4 Preview Manual Dialling

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

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

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

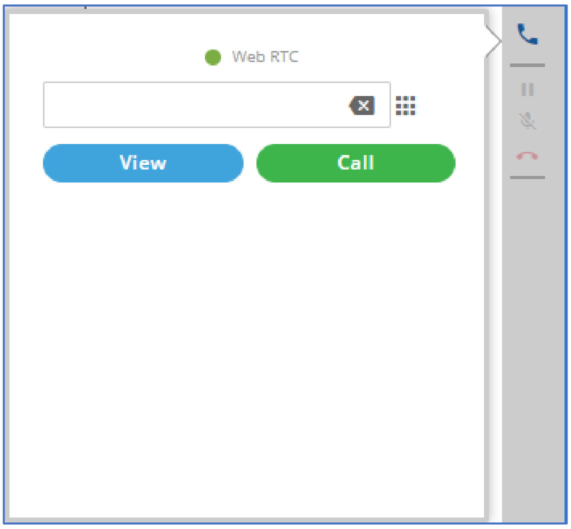


Figure: Manual Dial

2. Click  icon to show the numeric keypad.

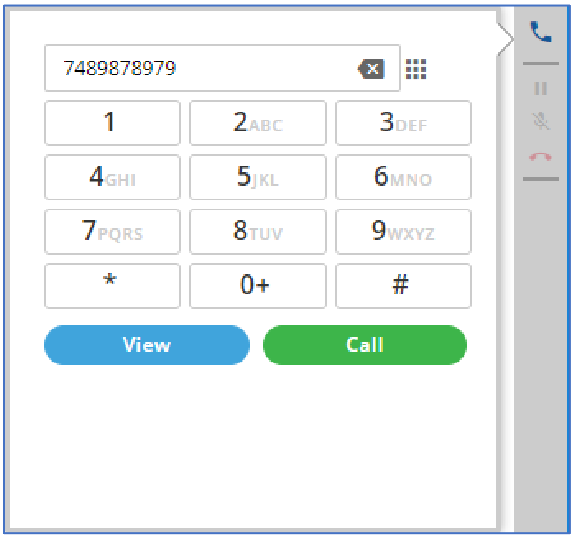


Figure: Numeric Keypad

3. The agent can either type the number through keyboard or this numeric keypad to punch the number.
4. After entering the number, click "View" button to view its information.
5. In case of multiple campaigns, the WebRTC dialer lists them and the agent has to select a campaign.

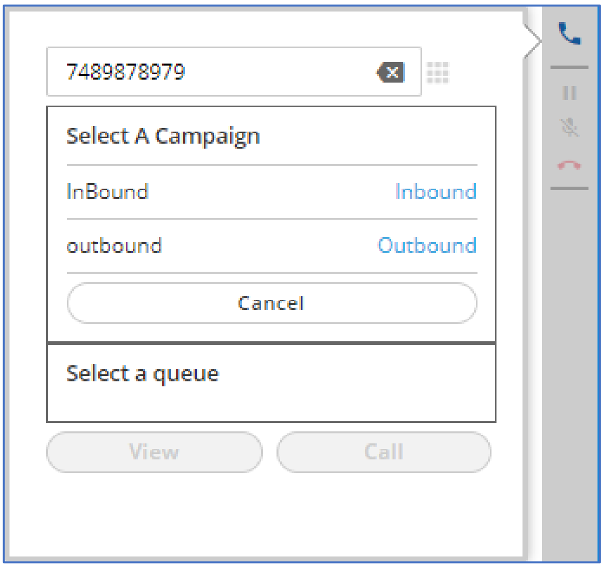


Figure: Campaign Selection

Here, we are using a different new number.

6. If the number is not registered in the system, an error message is displayed.

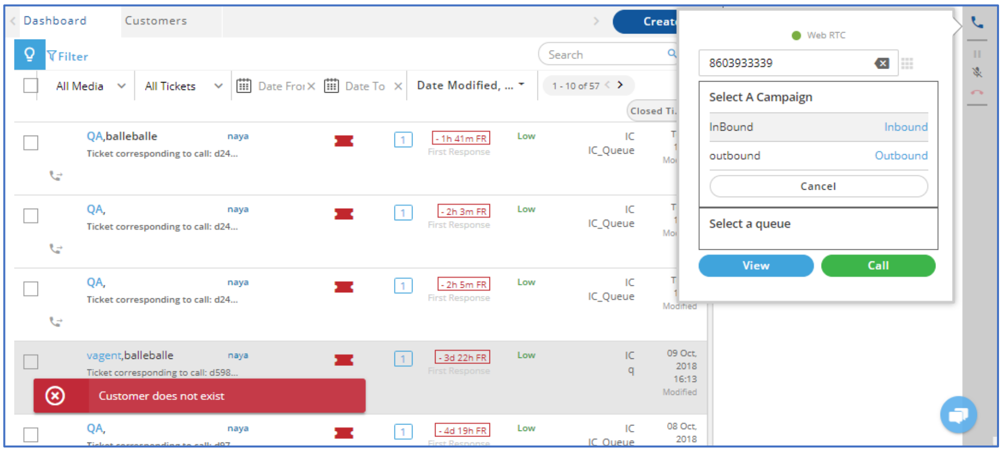


Figure: Customer Does not Exist

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

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

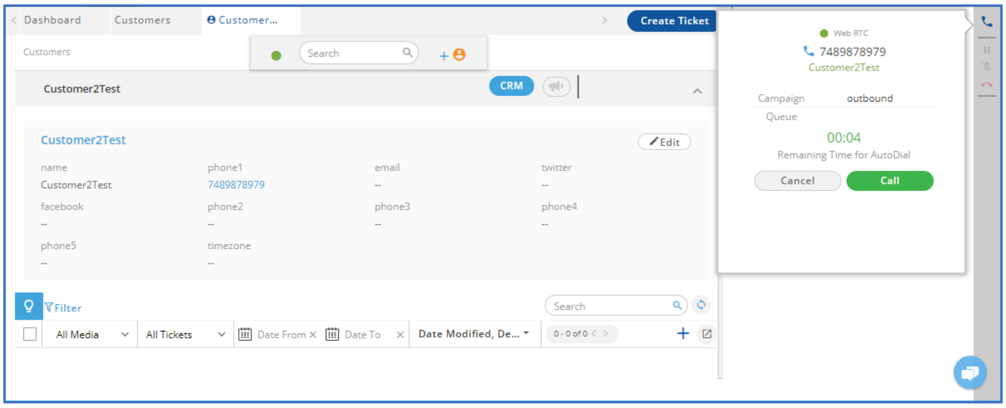


Figure: Showing the Customer

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

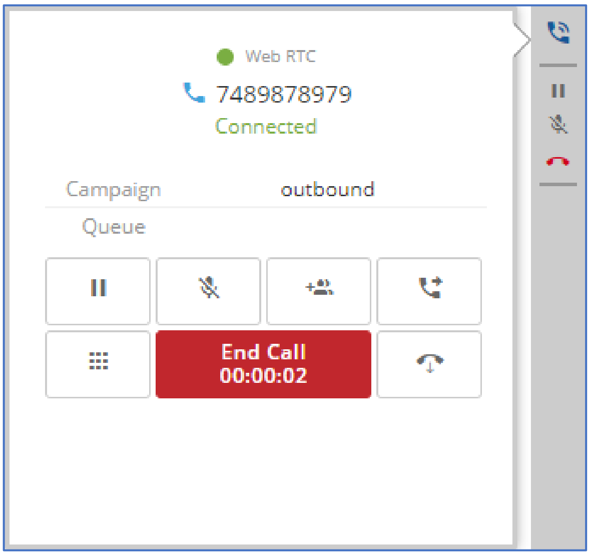


Figure: Calling a Customer

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

9. Once the call is connected, the agent can talk to the customer. After completing the call, the call dispositions are displayed in the WebRTC dialer.

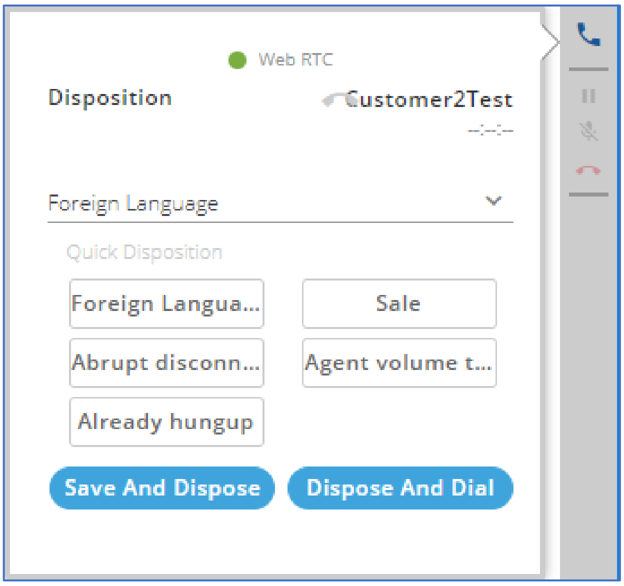


Figure: Dispositions of a Manual Preview Outbound Call

10. The agent can select the disposition through the drop-down menu or select any of the quick dispositions displayed on the screen. It contains the following two options.
    - **Save and Dispose:** Click it to dispose the ticket associated with the call using the selected disposition.
    - **Dispose and Dial:** Click it to dispose the current call ticket and continue to make a manual dial call. It shows a textbox in the WebRTC at the bottom.

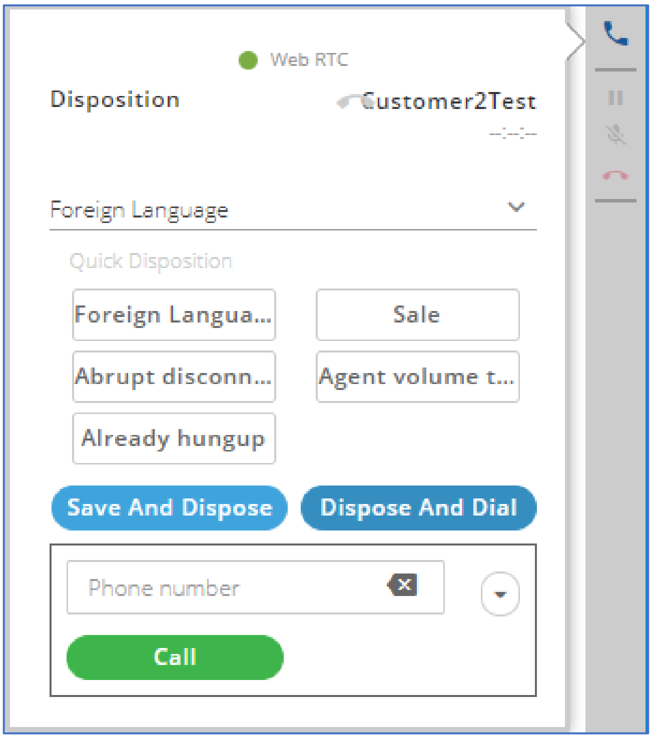


Figure: Continue to Manual Dial after Disposing Current Call

After entering the number, click "Call" to dispose the current call with the selected disposition and make a new outbound call with manual dial.

6.4.2.5 Auto Dial

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

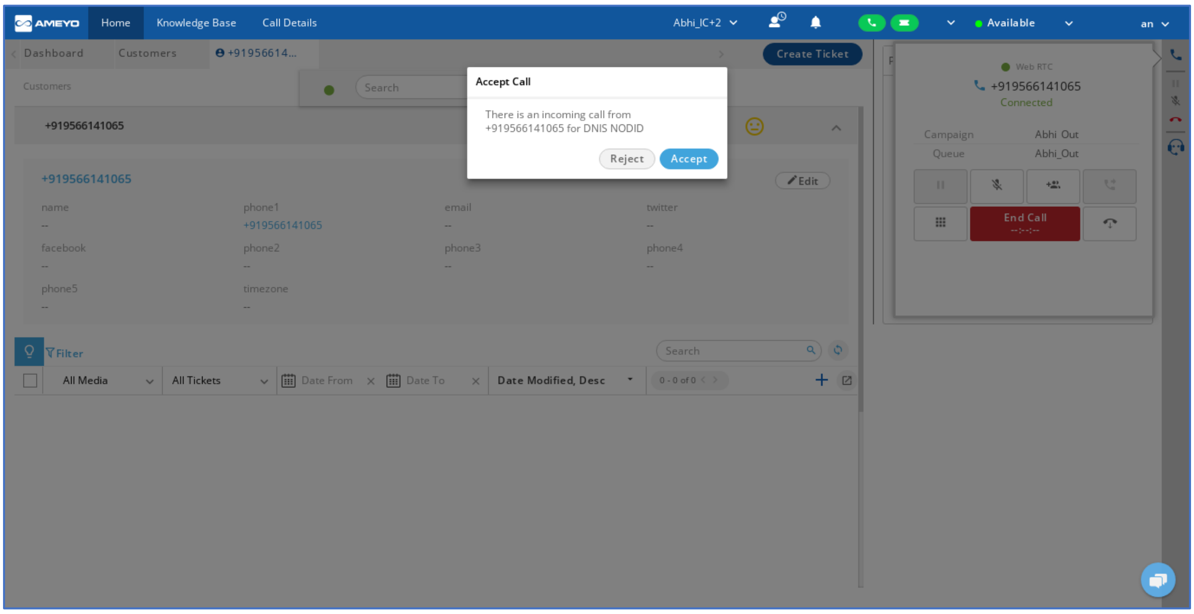


Figure: Outbound Call Sent by the Dialer.

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

The agent has to perform the following steps here.

1. Click "Accept" to attend the call.

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

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

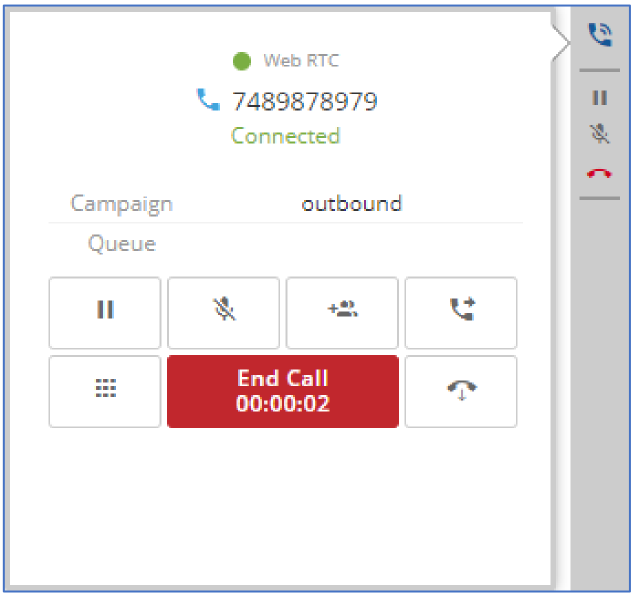


Figure: Calling a Customer

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

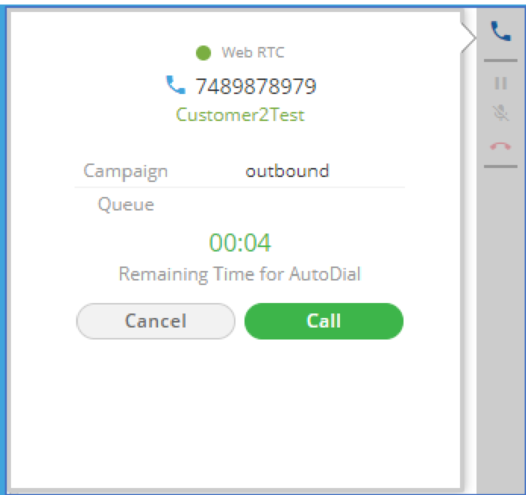


Figure: Preview Time

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

3. After completing the call, the call dispositions are displayed in the WebRTC dialer.

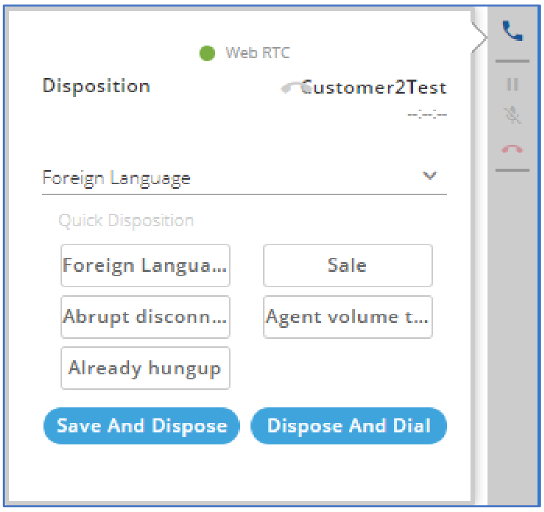


Figure: Dispositions of a Manual Preview Outbound Call

4. The agent can select the disposition through the drop-down menu or select any of the quick dispositions displayed on the screen. It contains the following two options.
   - **Save and Dispose:** Click it to dispose the ticket associated with the call using the selected disposition.
   - **Dispose and Dial:** Click it to dispose the current call ticket and continue to make a manual dial call. It shows a textbox in the WebRTC at the bottom.

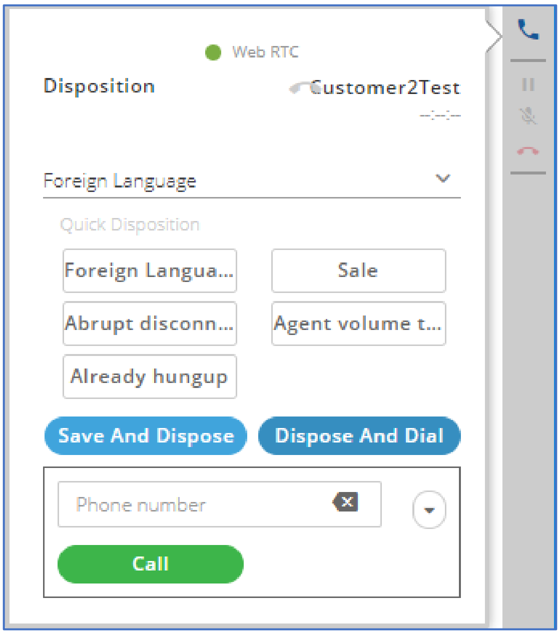


Figure: Continue to Manual Dial after Disposing Current Call

After entering the number, click "Call" to dispose the current call with the selected disposition and make a new outbound call with manual dial.

6.5 Call Control Functions

As soon as a call is placed, telephony panel will pop up containing telephony buttons which are used for call control.

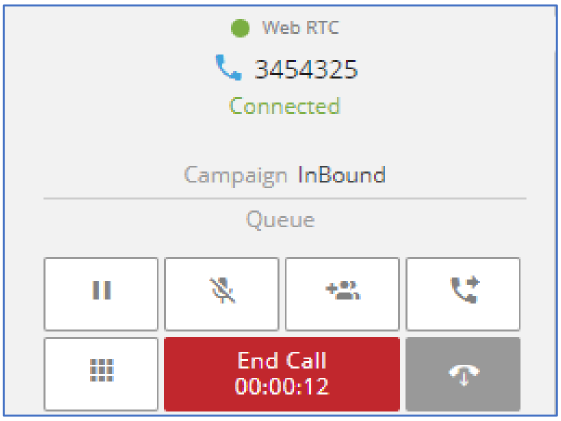


Figure: Call Screen

6.5.1 Call Hold/Talk

While on live calls, the agent can put the customer call on hold by clicking button. When a call is on hold, both parties will not be able to hear each other. Only music will be played to the caller.

The agent can un-hold (resume) the call by clicking button.

6.5.2 Conference

Call Conferencing allows to add guests to a call. A guest can be another agent, a field executive, a manager or a Supervisor. If you would like to add one or more guests to the call for a conference call, click button with the caller on line.

6.5.2.1 Confer a Call to a User or Supervisor

If the agent wishes to make a conference call to another user or supervisor, the agent may take the user or supervisor over conference call by using this confer option.

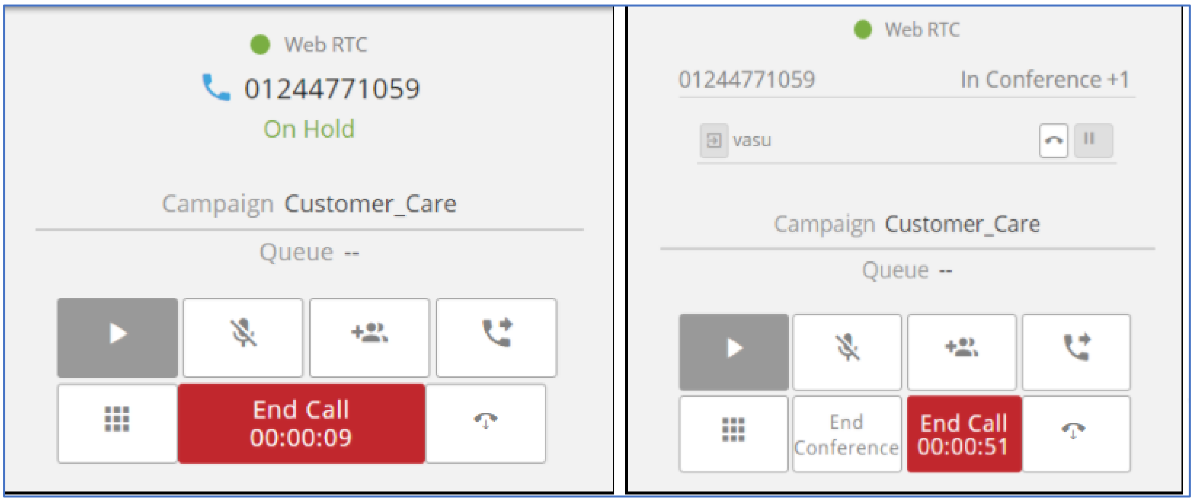


Figure: Call Conferencing

1. Only the names of the logged in users will reflect, who are available to take the calls.
2. Put the customer call on hold by clicking **"HOLD"** button and click **"CONFER"** button.
3. Agent can select the name of the person with whom he/she wants to confer a call from the "user" list. During this process, customer call would be on hold.
4. Agent can un-hold the customer by clicking **"UN-HOLD"** button and it will be a three-way conference call with new agent and the caller.
5. The agent can disconnect conference call by clicking **"End Conference"** button.
6. The agent can give the ownership to the other user while on the conference call by clicking button. The primary agent can come out of the call by disposing the call.
7. The primary agent can remove the added user from the conference call by clicking button.

6.5.2.2 Confer a Call to an External Number

The agent can do a conference call with the external customer by entering the telephone number on the dialling pad.

1. Agent will put the customer call on hold by clicking **"HOLD"** button and click **"CONFER"** button.
2. Enter the phone number to transfer the call to in the box labelled **"PHONE"**. After entering the phone number, click **"Confer To Phone"** button.

3. Once the call gets connected, agent can explain the use case to the new user. During this process, customer call is on hold.
4. Agent can un-hold the customer by clicking **"UN-HOLD"** button and it will be a three-way conference call with new user and the caller.
5. The agent can disconnect conference call by clicking **"End Conference"** button.
6. The primary agent can remove the added user from the conference call by clicking button.

6.5.2.3 Confer a call to Verifier

The agent gets the privilege to get the customer details verified over the live call by taking the verifier on the call. This functionality is performed by selecting the verifier name from the dropdown list.

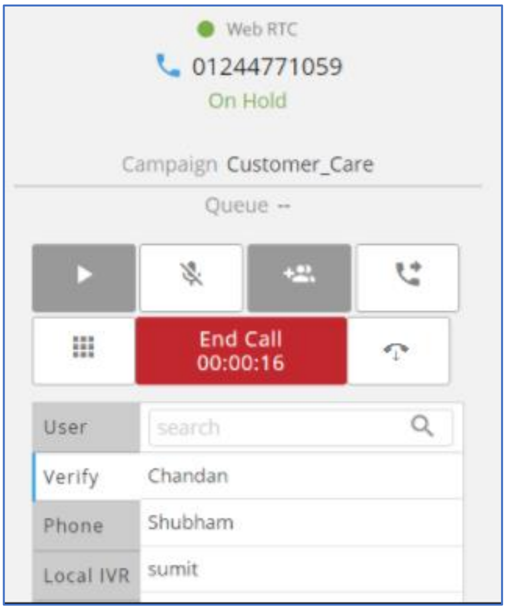


Figure: Call Conferencing to Verifier

1. Agent put the customer call on hold by clicking **"HOLD"** button and click **"CONFER"** button.
2. Agent can choose the name of verifier from the available list.
3. Once the call gets connected, agent can explain the use case and customer details to the verifier. During this process, customer call is on hold.

4. Agent can un-hold the customer by clicking **"UN-HOLD"** button and it will be a three-way conference call with verifier and the caller.
5. The agent can disconnect conference call by clicking **"End Conference"** button.

6.5.2.4 Confer a Call to IVR

If agent wants to facilitate any payment over IVR or to capture customer's feedback then he/she can take the call to local IVR in conference.

1. Agent will put the customer call on hold by clicking **"HOLD"** button and click **"CONFER"** button.
2. Agent needs to select the local IVR from the drop-down menu and click **"Confer with local IVR"** button.
3. Both customer and agent will be in conference with local IVR and both the parties will be able to hear the prompts of IVR (as per configured IVR flow).
4. Customer can enter the required inputs on IVR as per agent instruction or IVR prompts.

6.5.3 Call Transfer

If an agent wants to transfer a call, then he/she needs to click on the (TRANSFER) button. The agent will be able to select from the multiple options for call transfer.

1. Transfer to User
2. Transfer to Phone
3. Transfer to IVR
4. Transfer to Campaign
5. Transfer to Queue

6.5.3.1 Transfer a call to User or Supervisor (Warm Transfer)

A warm transfer is when agent will transfer the customer call to another agent or supervisor by giving him/her some background information about the caller. For transferring the call to external user follow the below steps:

1. Only the names of the logged in users will reflect, who are available to take the calls.

2. Agent will put the customer call on hold by clicking on “HOLD” button and then click on “TRANSFER” button.
3. Agent can choose anyone of the user from the available list. Once call is connected to new user, agent can give the customer details (required information) to the new user. During this process, customer call is on hold.
4. New user will un-hold the call by clicking on the “UN-HOLD” button and it will be a three-way conference call with new user, the caller and agent himself.
5. Agent can hang up from the conference call by clicking on the “End Call” button. The caller will then be on call with the new user.

6.5.3.2 Transfer a call to external number(Warm Transfer)

A warm transfer is when agent will transfer the customer call to external number by giving him/her some background information about the caller. For transferring the call to external user follow the below steps:

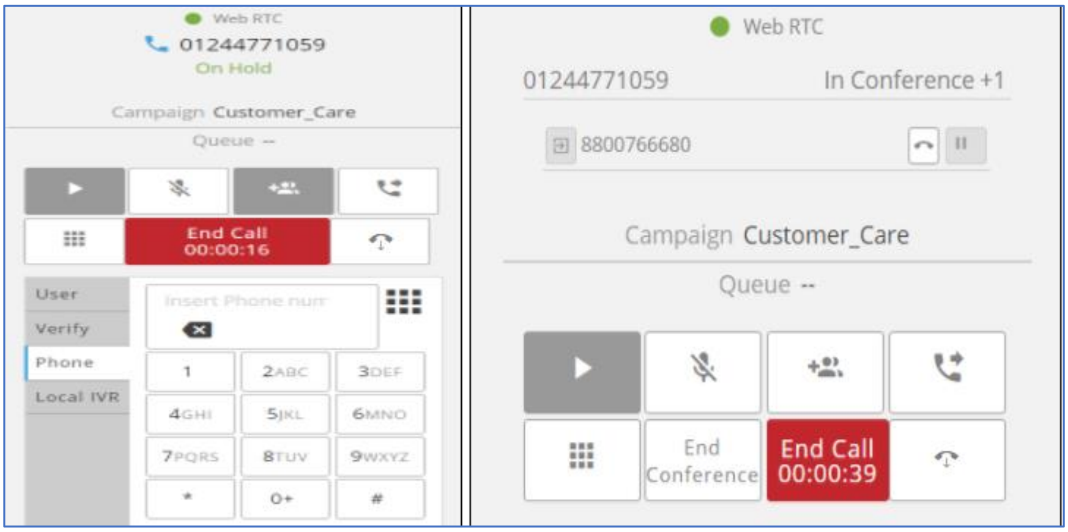


Figure: Call Transfer to External

1. Agent will put the customer call on hold by clicking on “HOLD” button and then click on “CONFER” button.
2. Enter the phone number to transfer the call to in the box labelled “PHONE”. After entering the phone number, click the “Confer To Phone” button.
3. Once the call gets connected, agent can explain the use case to the external party. During this process, customer call is on hold.

4. External party will un-hold the call by clicking on the "UN-HOLD" button and now there will be a three-way conference call with new user, the caller and agent itself.
5. The agent can give the ownership to the external party while on the conference call by clicking button. The primary agent can come out of the call by disposing the call.
6. The primary agent can remove the external party from the conference call by clicking on button.

6.5.3.3 Transfer a Call to IVR

If agent wants to facilitate any payment over IVR or to capture customer's feedback then he/she can take the call to local IVR in conference.

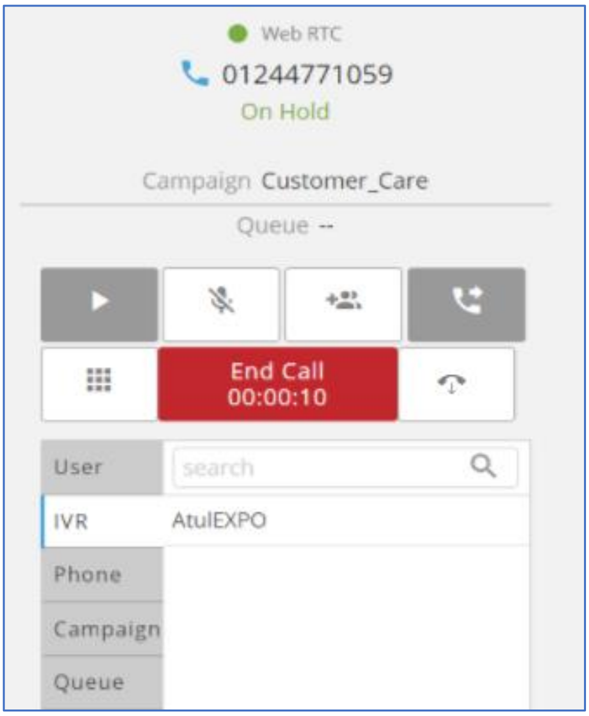


Figure: Call Transfer to IVR

1. Agent will put the customer call on hold by clicking on "HOLD" button and then click on "TRANSFER" button.
2. Agent needs to select the IVR from the drop down and call will be transferred to the selected IVR.
3. Customer can enter the required inputs on IVR as per IVR prompts.

6.5.3.4 Transfer a call to Campaign

There are cases when customer wants to talk regarding a particular concern for which there is a separate campaign, in that case agent can use transfer to “Campaign” option.

1. Agent will put the customer call on hold by clicking on “HOLD” button and then click on “TRANSFER” button.
2. Agent needs to select the “campaign” name from the dropdown list, after which the call will be transferred to any available agent in the selected campaign.

6.5.3.5 Transfer a call to another Queue (of same campaign)

This option can be used by agent if customer has by mistake selected the wrong queue in the IVR, for example IVR has queue of sales, support and general queries and customer called in for support however in error he/she selected sales queue in the IVR so, agent can re-route the call to correct queue by following below steps. This option is applicable for inbound campaigns only.

1. Agent will put the customer call on hold by clicking on “HOLD” button and then click on “TRANSFER” button.
2. Agent needs to select the queue name from the drop down list and select the appropriate queue in which the call needs to be transferred.

7. Schedule Callback

The schedule call back feature helps us to call back customers for further follow-up

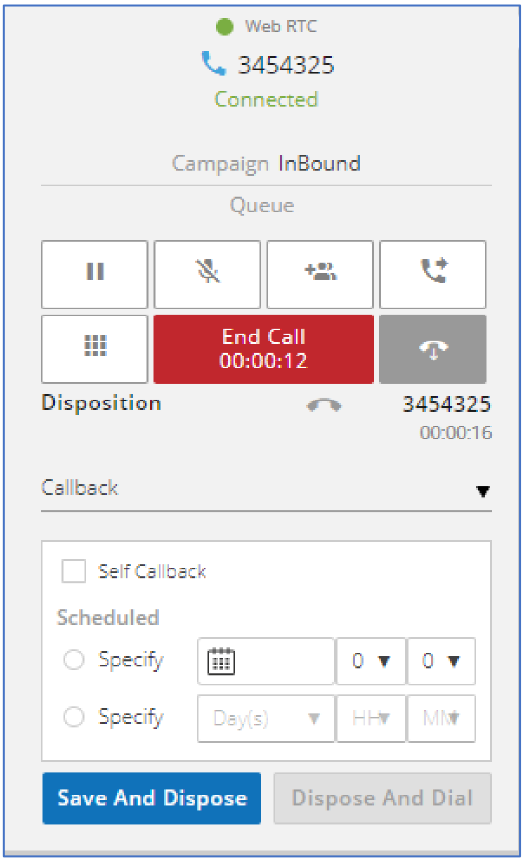


Figure: Schedule Callback

1. If any caller requests for a call back then the agent disposes the call as call back and the call back will be scheduled accordingly.
2. In order to schedule a call back in Ameyo system the agent needs to select the "call back" value from the disposition drop down.
3. In case agent wants to schedule a self-call back, that is, the call back should only be routed to him/her and not to any other random user in the campaign then check the "Self Call-back" option, else uncheck this option to route the scheduled call back to any available user in the campaign.
4. To schedule a call back for a specific date, select the radio button "On" and choose the date from calendar option and time from the provided Hrs and Mins drop down.

5. Agent can also select "After" radio button to schedule the call back after a few days.

The scheduled call backs for an agent are displayed in "Call Back" tab of "Call Details".

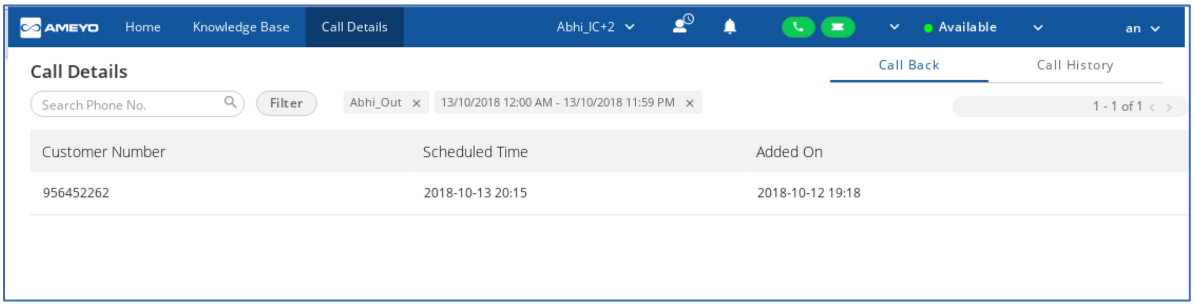


Figure: Call Back Tab

8. Callback Notification

1. At any time, an agent can view its upcoming call-backs by clicking  icon (if same is configured by administrator) and can wrap the existing call accordingly.
2. The agent can dial the number manually if the agent is not on active call.
3. Information related to scheduled call-backs will be shown at the top of the screen.

9. Call Details

Through "Call Details" tab, the agent can view its upcoming call-backs and can also fetch the call history. Tin contains the following two sub-tabs.

- Call-backs
- Call History

9.1 Call-backs

This tab shows the call-backs scheduled for the agent at system level (for all campaigns).

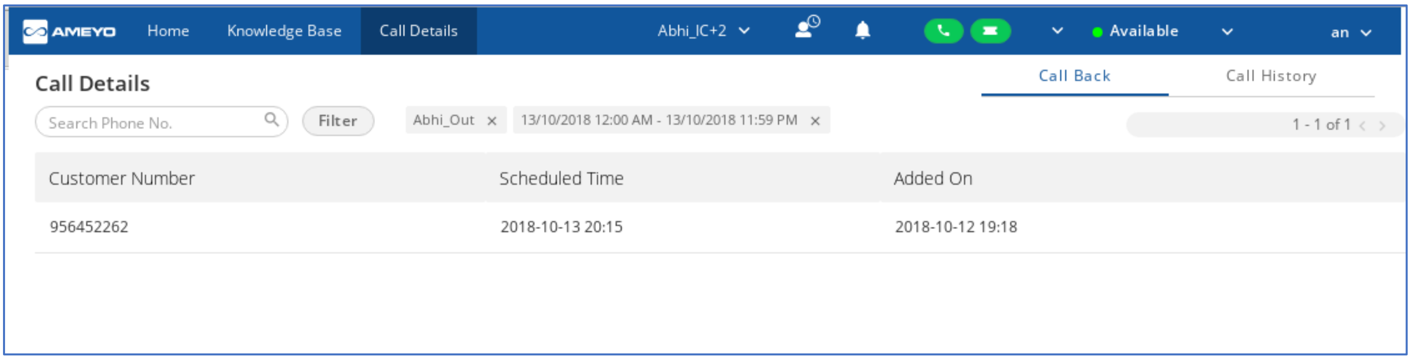


Figure: Call Back Tab

The agent can click "Filter" to apply the filters.

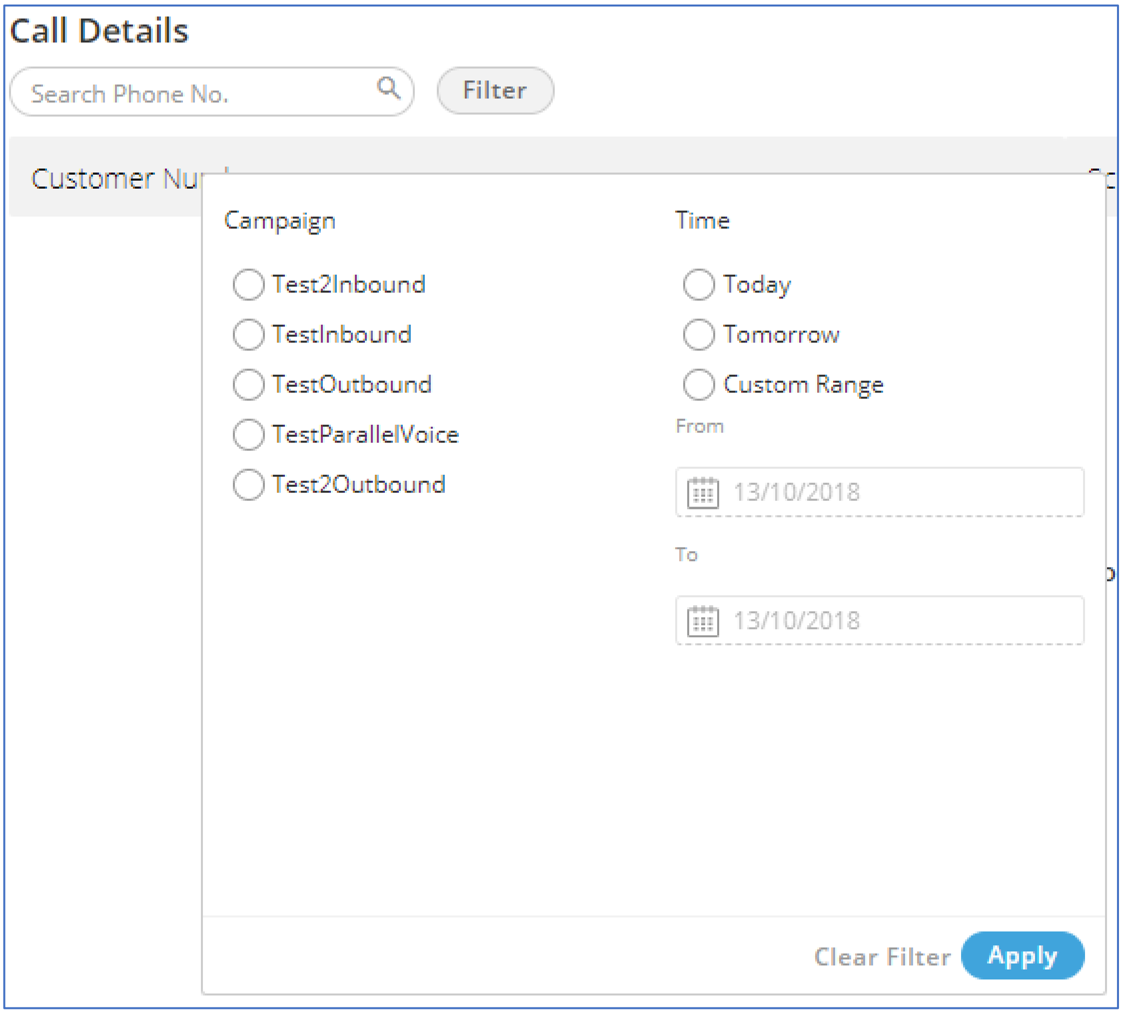
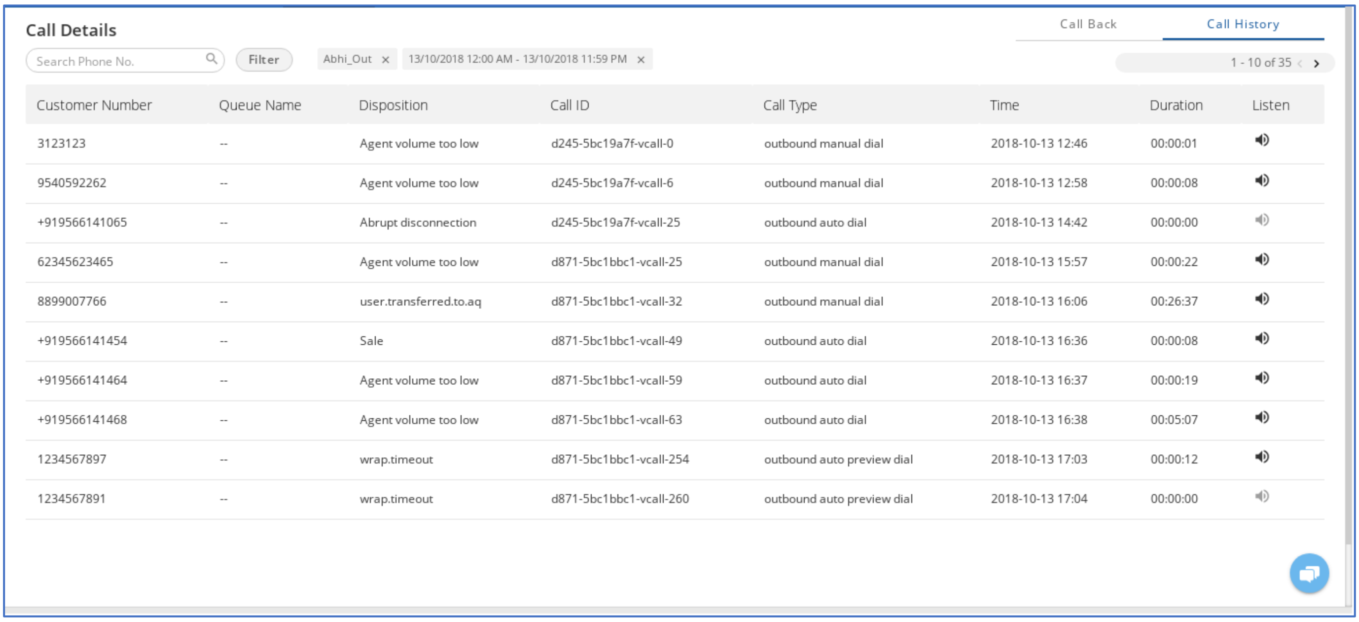


Figure: Call Back Filters

Select the filter and click "Apply". Click "Clear Filter" to clear the filter and to view the default list of call-backs.

9.2 Call History

Call History Tab shows the history of calls made or received by the agent.



Customer Number	Queue Name	Disposition	Call ID	Call Type	Time	Duration	Listen
3123123	--	Agent volume too low	d245-5bc19a7f-vcall-0	outbound manual dial	2018-10-13 12:46	00:00:01	
9540592262	--	Agent volume too low	d245-5bc19a7f-vcall-6	outbound manual dial	2018-10-13 12:58	00:00:08	
+919566141065	--	Abrupt disconnection	d245-5bc19a7f-vcall-25	outbound auto dial	2018-10-13 14:42	00:00:00	
62345623465	--	Agent volume too low	d871-5bc1bbc1-vcall-25	outbound manual dial	2018-10-13 15:57	00:00:22	
8899007766	--	user.transferred.to.aq	d871-5bc1bbc1-vcall-32	outbound manual dial	2018-10-13 16:06	00:26:37	
+919566141454	--	Sale	d871-5bc1bbc1-vcall-49	outbound auto dial	2018-10-13 16:36	00:00:08	
+919566141464	--	Agent volume too low	d871-5bc1bbc1-vcall-59	outbound auto dial	2018-10-13 16:37	00:00:19	
+919566141468	--	Agent volume too low	d871-5bc1bbc1-vcall-63	outbound auto dial	2018-10-13 16:38	00:05:07	
1234567897	--	wrap.timeout	d871-5bc1bbc1-vcall-254	outbound auto preview dial	2018-10-13 17:03	00:00:12	
1234567891	--	wrap.timeout	d871-5bc1bbc1-vcall-260	outbound auto preview dial	2018-10-13 17:04	00:00:00	

Figure: Call History

Call History is shown in terms of the following attributes.

1. **Customer Number:** It shows the customer number on which call was made or from which call was received.
2. **Queue Name:** It shows the queue name in which call was received.
3. **Disposition:** It shows the user disposition with which the respective call was disposed (only case of connected calls).
4. **Time:** It shows the date and time at which the inbound call came or at which the outbound call was dialled.
5. **Duration:** It shows the total call duration of the respective call.
6. **Listen:** It shows the voice recording of the call. For connected calls, recording is played, and agent can listen to that call and also he can download that voice log by clicking on (download) symbol, For, non-connected logs, it will not play any recording.

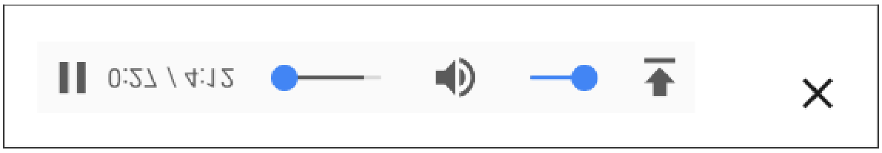


Figure: Play Call Recording

The agent can click "Filter" button to filter the list of call history.

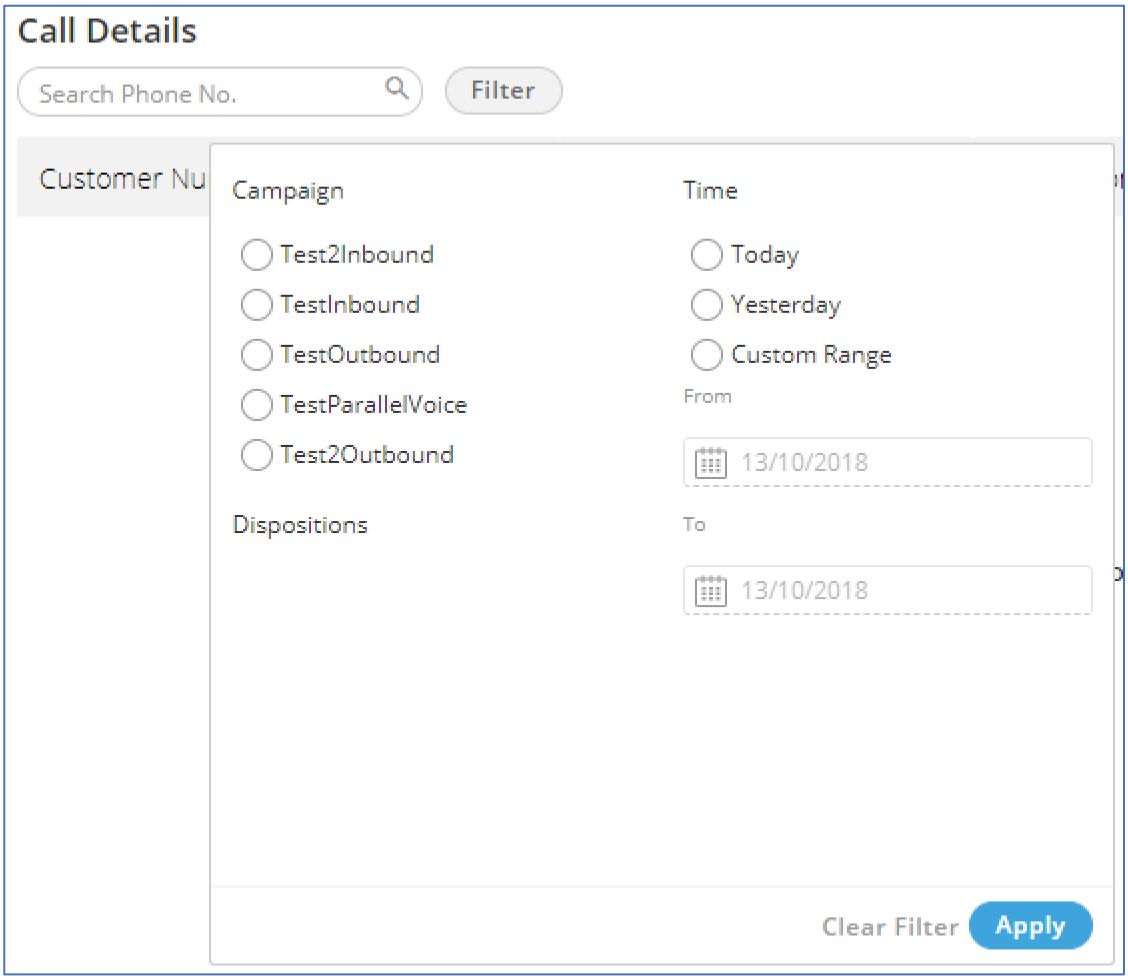


Figure: Call History Filters

Select the filter and click "Apply". Click "Clear Filter" to clear the filter and to view the default list of call-backs.

Figure: Home Screen

10. Logout from Ameyo

The agents are supposed to logout from the Ameyo application once their respected shift is completed. Agents need to click on their name (top right corner) to access a menu..

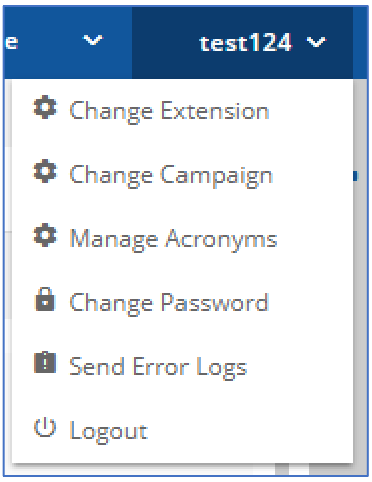


Figure: Logout from Ameyo

Click "Logout" to logout from the system.