



Ameyo 4.3

Supervisor Manual

[Abstract](#)

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

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1. Supervisor Login at Ameyo

The Supervisor has access to web-based interface with the privileges to monitor real-time activities as well as view historical statistics pertaining to the campaigns and process assigned to the Supervisor.

Perform the following steps.

- To login, the Supervisor needs to open the following URL.

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

Replace the following variables.

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

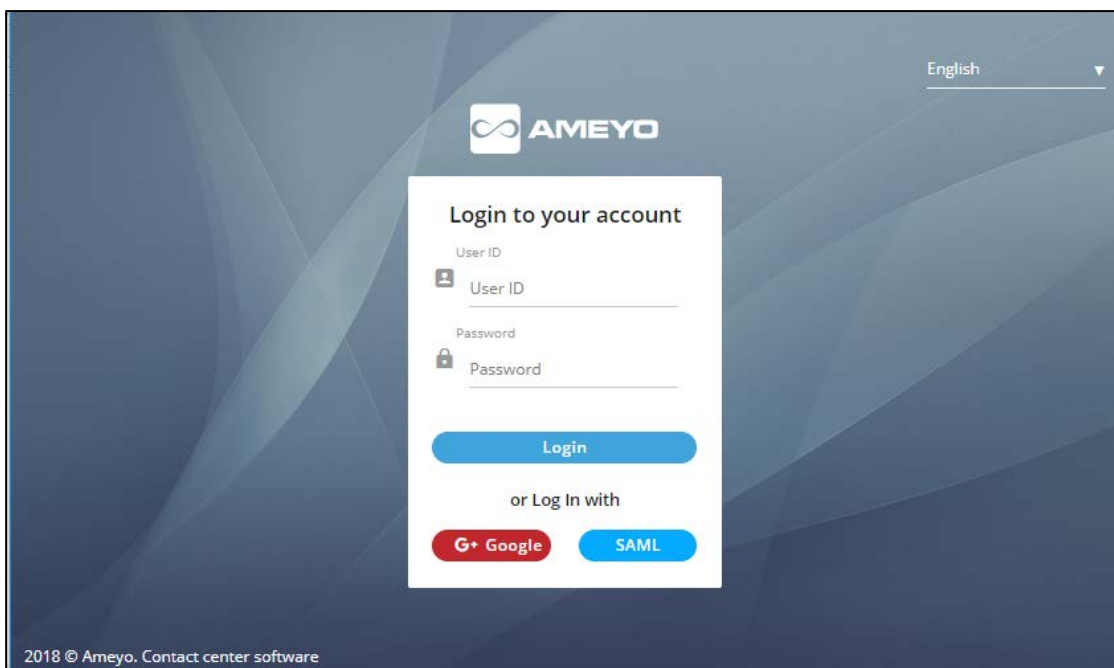


Figure: Login Screen

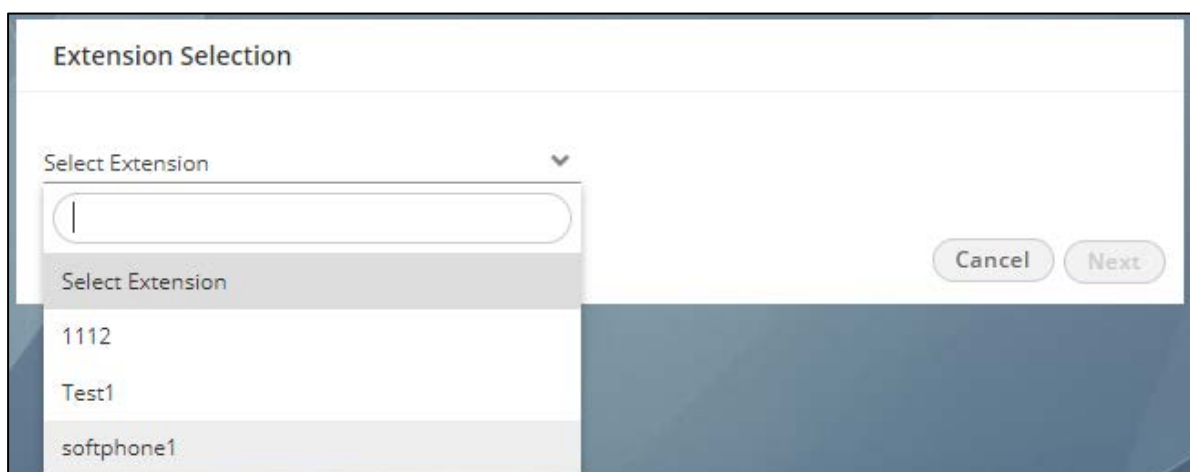
2. Use any of the following methods to login.
 - A. **Normal Login:** The agent needs to enter the "User ID" and "Password" which is provided by the administrator in the login screen and click "**Login**".
 - B. **Login with SAML:** Click "SAML" to login with your SAML Account hosted at your IDP (Identity Provider).

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

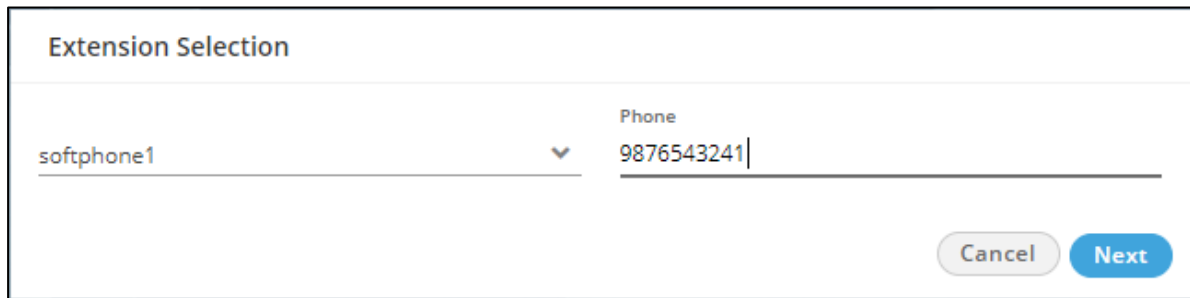
- C. **Google:** The user can also login using its Google account. The user does not have to use Ameyo user credentials to login; rather users can login using Single-Sign-On by just logging into its Google account.
Click "Google" to login with your Google account.

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.

If Supervisor is assigned to any voice campaign, the pop-up to select the extension comes up.

**Figure:** Extension Selection

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



The screenshot shows a dialog box titled "Extension Selection". It features a text input field with "softphone1" and a dropdown arrow. To the right, there is a "Phone" label and a text input field with "9876543241". At the bottom right, there are "Cancel" and "Next" buttons.

Figure: Entering Number after selecting Extension

Click "Next" to proceed. Enter the phone number and click "Next" to proceed.

After login, the Home page of Supervisor Interface is displayed.

2. Supervisor Console

After logging in, the supervisor can access its console. The Console allows the Supervisor to view real-time information on the activity of the agents and to simultaneously change parameters, the status, and assignment of agents, and queues.

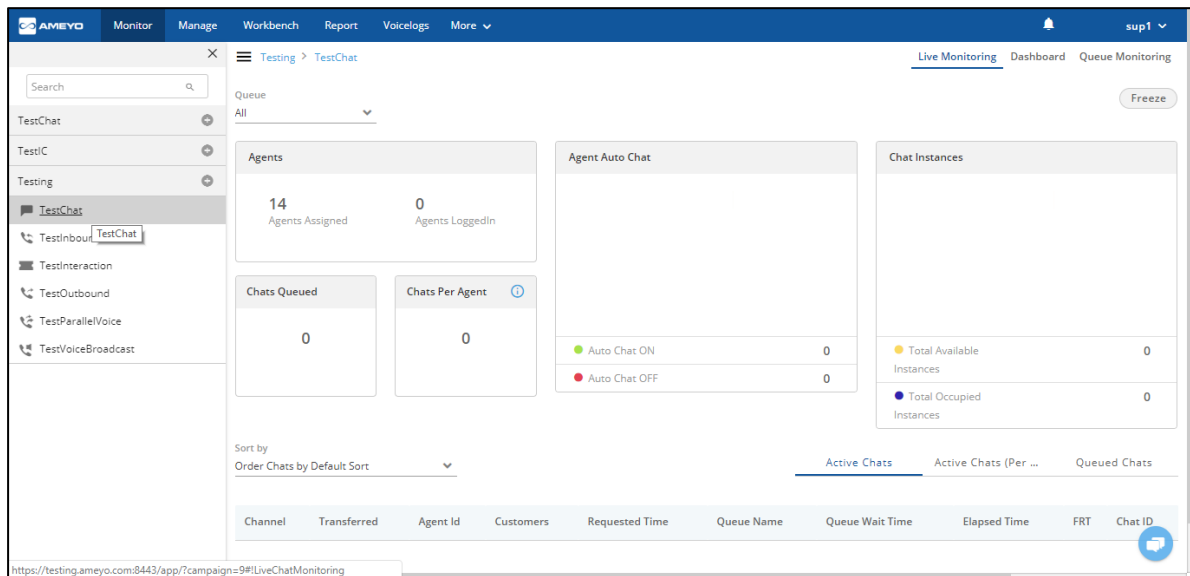


Figure: Supervisor Interface

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

1. Left Side Navigation Bar
2. Monitor
3. Manage
4. Workbench
5. Reports
6. Voicelogs
7. Ameyo Control Panel (ACP)

2.1 Left Side Navigation Bar

It is a fixed left side navigation bar that shows the processes and the campaigns, to which the supervisor has been assigned. When not expanded, click ☰ icon to show it. When it is displayed, click "X" to close the sidebar. The interface of both Monitor and Manage Tab is completely based upon the process or campaign selected in this navigation bar.

2.2 Process Settings

The Supervisor can click a process in the Navigation Bar to access its settings. [Know more...](#)

2.3 Monitor

The Supervisor can monitor the campaigns in which it has been assigned. [Know more...](#)

2.4 Manage

Here, Supervisor can manage the settings of different campaigns. [Know more...](#)

2.5 Workbench

The Supervisor can make/receive calls through its workbench. The Supervisor can also make use of call control functions such as confer, transfer, and others. The Supervisor Workbench is similar to the Agent Interface, that is, the functions and user interface of both the Supervisor Workbench and the Agent Console is same.

2.6 Reports

The Supervisor can get the call details data, get to know about agent activities, SLA summary, and others. Reports also help supervisor to understand the importance of planning, configuration, and scripting for accurate reporting data.

2.7 Voicelogs

This tab shows the voice logs that can be played and downloaded as a file on the disk.

2.8 Ameyo Control Panel

This tab hosts the Ameyo Control Panel, where the supervisor can perform some controlling operations the Ameyo System.

3. Process Settings

In the sidebar, the Supervisor can click any process to access the Process Settings.

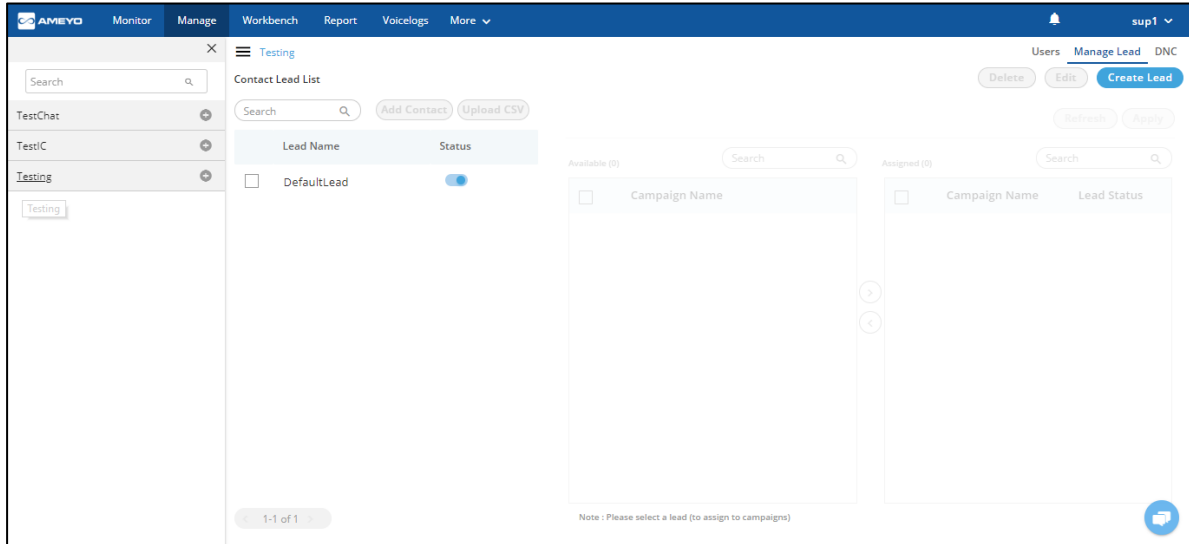


Figure: Process Settings

It contains the following tabs. Click the links to know more about them.

- **User:** This tab is available for the Processes which contains any type of campaign including chat, interaction (email), and voice.
- **Manage Lead:** This tab is available for the Processes which contains any type of campaign including chat, interaction (email), and voice.
- **DNC:** This tab is available for only those Processes which contain a Voice Campaign. It would not be available for those campaigns which contains only chat, email, or both campaigns only.

3.1 User Management

Here, the Supervisor can manage the users in the process. Changes made here will apply to all the campaigns in this process.

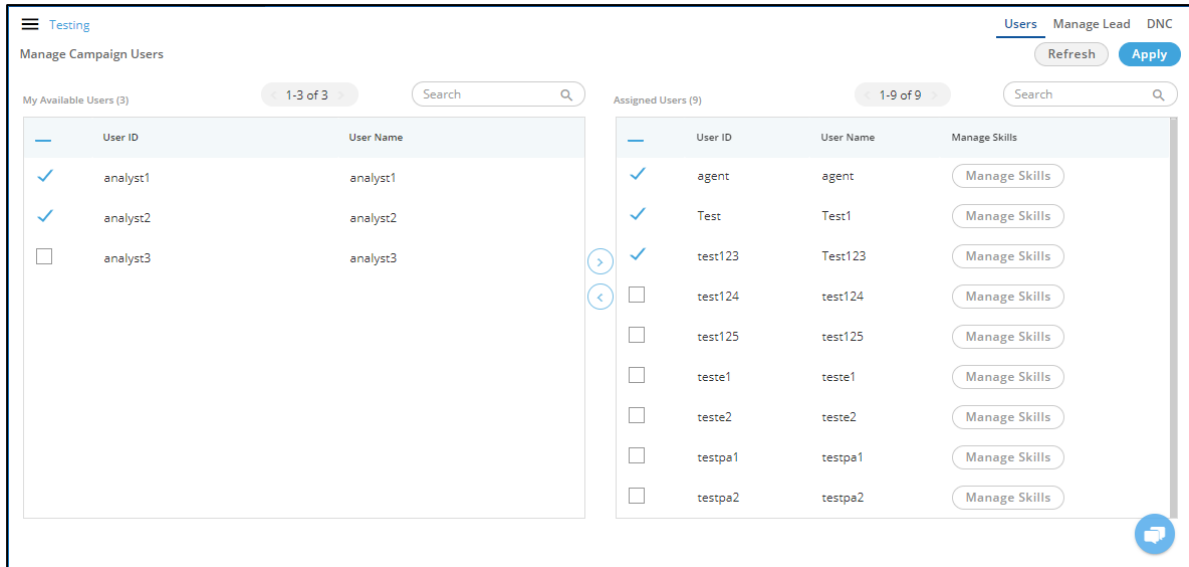



Figure: User Management

The Supervisor can perform the following operations here.

3.1.1 Assign or Unassign Users in Process

The Supervisor can assign or unassign the users in the process. If a user is unassigned in the process, then it will remain unavailable for all campaigns in this process.

Perform the following steps here to assign or unassign the users.

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 usernames in the provided search box.
2. Click  icon to add the selected users.
3. Click "Apply" to apply the settings.

To unassign the users, select the users in "Assigned Users" section and click  icon. Click "Apply" to make the changes.

3.1.2 Manage Skills

The Supervisor can manage the skills for the users who are assigned in the campaign.



Figure: Manage Skill option

Perform the following steps.

1. Click "Manage Skills" button for any user in "Assigned User" section. It shows the following pop-up.

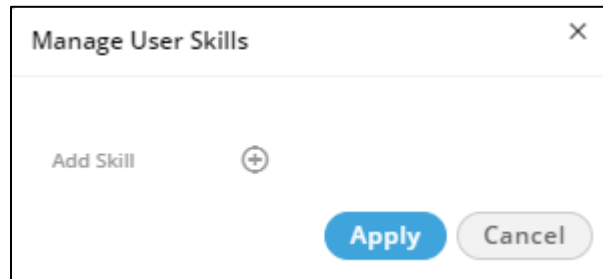


Figure: Manage Skill pop-up

2. Click "+" icon to add a skill. It shows the skills added by the Administrator in its Console.

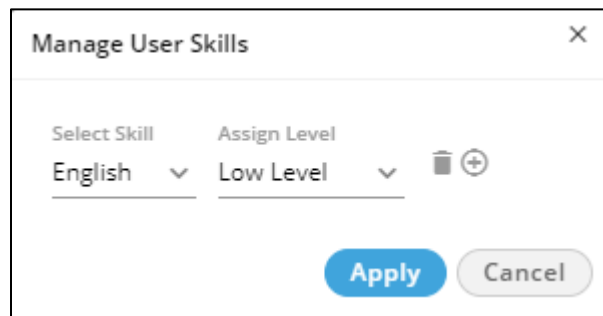



Figure: Manage Skills

3. Select a skill and then select its level.
4. You can click "+" icon to add more skills.
To delete a skill, click  icon.
5. Click "Apply" to apply the skill to the selected user.
Click "Cancel" to not apply the skills.

6. It takes you back to "Users" tab in "Process" Settings. Click "Apply" to apply the changes.

Click "Refresh" either to discard the changes or to refresh the page view.

3.2 Lead Management in Process

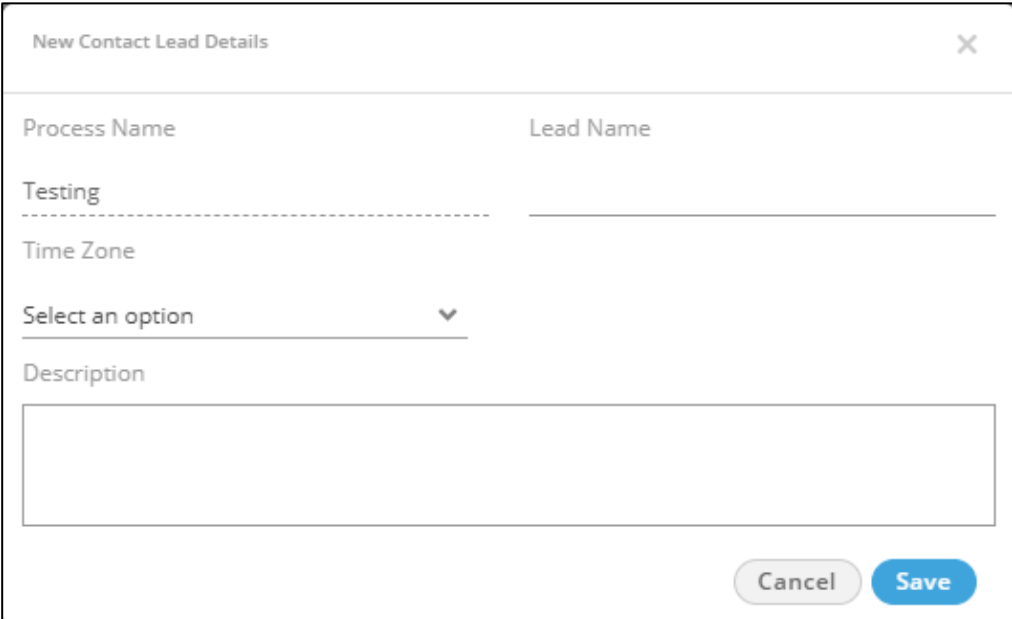
Here, the supervisor can create a lead, upload CSV containing phone numbers, modify it, and assign it to campaigns in the selected process.

Leads created and uploaded in a Process will not be available to another process.

3.2.1 Lead Creation

Lead can be created in a process, but not in the single campaign.

1. Click "Create Lead" button. It shows a pop-up, in which Supervisor has to fill the following details:
 - A. Lead Name
 - B. Time Zone
 - C. Lead Owner
 - D. Description



The screenshot shows a pop-up window titled "New Contact Lead Details" with a close button (X) in the top right corner. The form contains the following fields:

- Process Name:** A text input field with the value "Testing" and a dashed line below it.
- Lead Name:** A text input field.
- Time Zone:** A dropdown menu with the text "Select an option" and a downward arrow.
- Description:** A large text area for entering details.

At the bottom right of the form, there are two buttons: "Cancel" (grey) and "Save" (blue).



Figure: Create a Lead

2. Click "**Save**" to save the required changes.
Click "**Cancel**" to cancel the changes made.

The Supervisor can edit and delete the leads also. However, a deleted lead cannot be restored.

Multiple leads can be added here.

3.2.2 Enable or Disable the Lead

The Supervisor can click  toggle switch to disable an enabled lead. To enable a disabled lead, click  toggle switch.

3.2.3 Lead Upload

We recommend to upload a CSV file that contains the columns in the similar order as they are defined by the Administrator in its Console → "System Configuration" → "Table" → "Table" (Definition) and which has been used to create that process that you have selected here. Following is a screenshot of a sample CSV file.

	A	B	C	D	E	F	G	H	I	J
1	twitter	timezone	facebook	phone2	name	phone3	phone4	phone5	email	phone1
2		Asia/Kolkata			Customer1				customer1@domain.com	123456789
3		Asia/Kolkata			Customer2				customer1@domain.com	987654321
4		Asia/Kolkata			Customer3	1234567			customer1@domain.com	7654321
5										

Figure: Sample CSV File

Make sure to follow the rules of Character Type, Nullable, Unique Key, and Primary Key while entering the values in the CSV file as they are defined in the Table Definitions by the Administrator.

To upload the CSV file in the lead, the supervisor has to perform the following steps.

1. Select the lead in which the file has to be uploaded.
2. Click "Upload Lead" to upload the CSV file using the following pop-up.

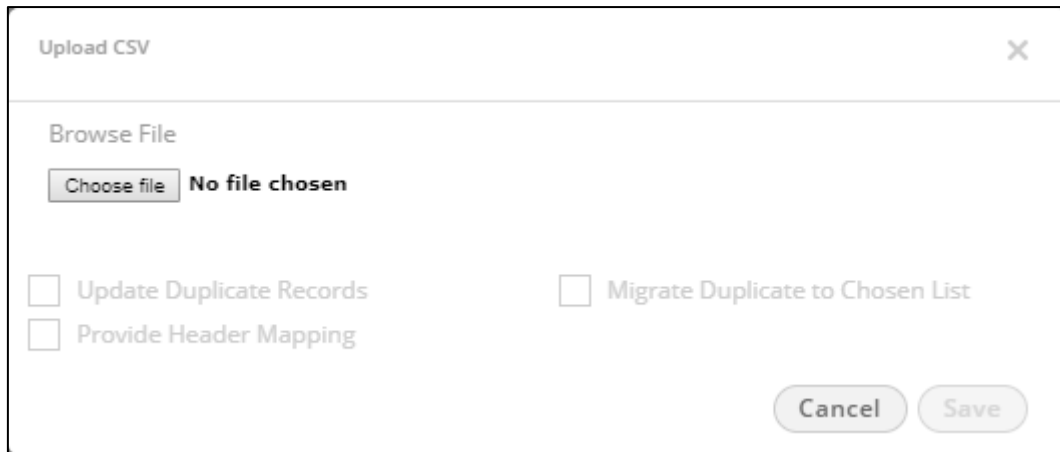


Figure: Upload Lead (Numbers) through a CSV file

3. To browse the file, click on "**Choose File**" button.
4. Select the CSV file from the disk using the following dialog box.

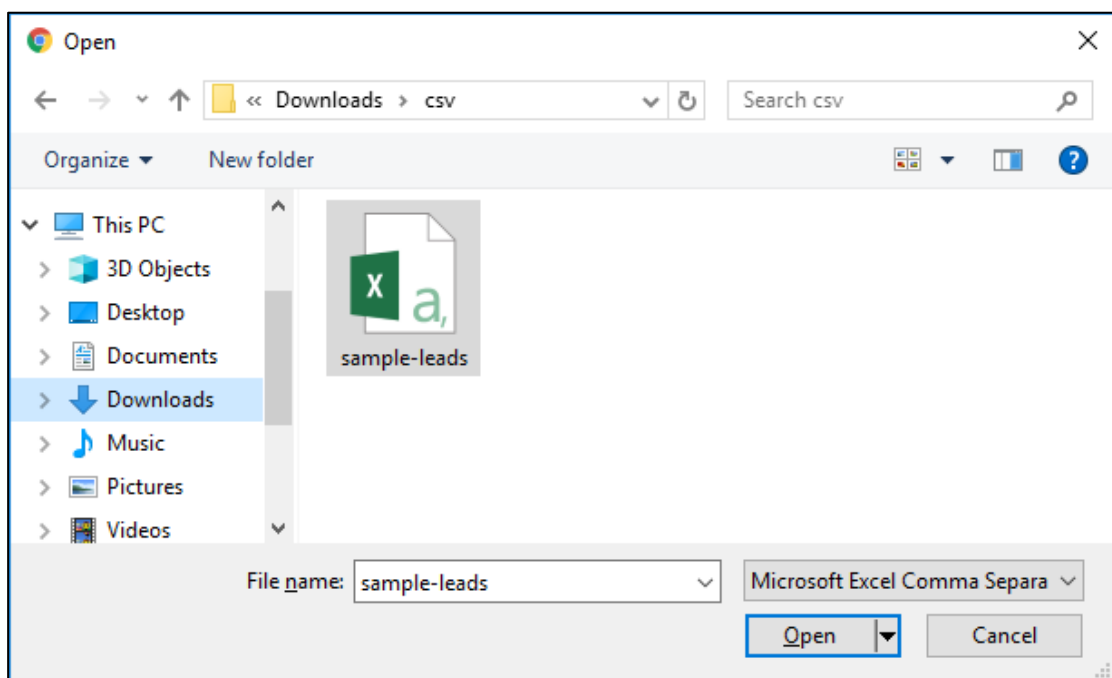


Figure: Select CSV file

5. Click "Open" to open the selected CSV file.
6. Now, the Supervisor can select these upload parameters.
 - A. **Update Duplicate Records:** This option can be used when there is a chance that the numbers of new lead may exist in the same lead or any other lead of the same campaign. By checking this option, if there is any record which is

already uploaded in any of the lead of the same campaign, then that record will get updated with the new information (as uploaded in the new lead) within existing lead only.

- I. If the record exists in the different lead, then the number will be updated in that lead only, and that number will not get uploaded in the new lead.
 - II. If the record exists in the same lead (in which the supervisor is trying to upload the new lead), then that number will get updated with the new information within the same lead.
- B. **Migrate Duplicate to Chosen List:** This option can be used to migrate any existing record in a new lead. By checking this option, if there is any record which is already uploaded in any of the lead of same campaign, then that number will get migrated to new lead with the new information.
- C. **Provide header Mapping:** The Supervisor can map the CSV file headers of lead with phone1, phone2, phone3, phone4, phone5, timezone and name headers.

The screenshot shows a dialog box titled "Upload CSV" with a close button (X) in the top right corner. Below the title bar, there is a "Browse File" section with a "Choose file" button and the filename "sample-leads.csv" followed by a close button (X). Below this, there are two checkboxes: "Update Duplicate Records" (unchecked) and "Migrate Duplicate to Chosen List" (unchecked). The "Provide Header Mapping" checkbox is checked. Below the checkboxes, there are two columns of dropdown menus for mapping headers. The left column has headers: "twitter", "facebook", "name", "phone4", and "email". The right column has headers: "timezone", "phone2", "phone3", "phone5", and "phone1". At the bottom right, there are "Cancel" and "Save" buttons.

Figure: Mapping of Column Headers

You can select your column headers for the mapping.

7. Click "**Save**" to save the required changes.

Rather, click "**Cancel**" to not upload the leads from the CSV file.

3.2.4 Add a Contact

The Supervisor can also add a new contact in the lead by performing the below steps:

1. Select the required row.
2. Click on "**Add Contact**" button.

Add Customer

Lead Name

Test1

Customer Detail

twitter	timezone
facebook	phone2
name	phone3
phone4	phone5
email	phone1*

Cancel Save

Figure: Add a Contact

3. Provide the values for the customer details in the fields such as name, email, phone1, twitter, and others.
4. Click "**Save**" to save the required changes.
Click "**Cancel**" to cancel the changes made.

3.2.5 Assign or Unassign Lead to Campaigns


Perform the following steps to assign or unassign the lead to the campaigns.


1. Select a lead, and it shows the campaigns on the right side.

Figure: Assign or Un-assign Campaigns

2. Select the Campaigns in "Available" section. You can click the checkbox given on top to select all campaigns.

You can also search for the usernames in the provided search box.

3. Click  icon to add the selected campaigns.
4. Click "Apply" to apply the settings.

To unassign the lead from the campaigns, select the campaigns in "Assigned" section and click  icon. Click "Apply" to apply the changes.

3.3 DNC Management

Supervisor can manage DNC (Do Not Call) repository using this tab. The excluded numbers would not be dialed in Ameyo system. The DNC can be managed for an entire process, but not for a campaign specifically.

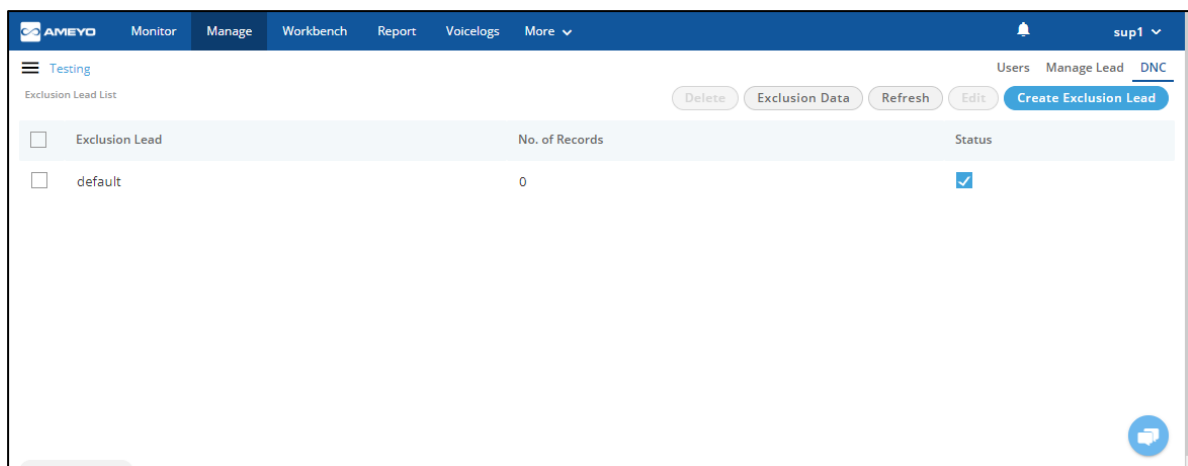


Figure: DNC Management

3.3.1 Create an Exclusion

Perform the following steps to add the list of exclusion numbers, which will not be dialed in the Ameyo System.

1. Click "Create Exclusion Lead" button. It shows the following pop-up.

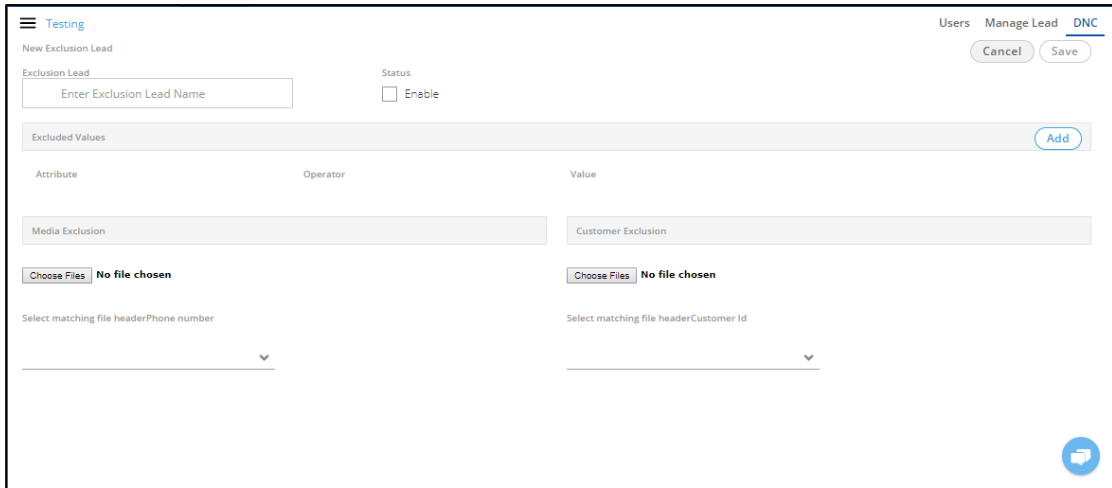


Figure: Adding an Exclusion

2. **Exclusion Lead:** Enter the name of the Exclusion Lead.
3. **Status:** If the checkbox against "Enabled" is checked then this exclusion lead status will be enabled else it will be disabled.
4. **Types of Exclusions:** Supervisor can add any of the following exclusions.
 - A. **Attribute Exclusion:** The Supervisor can add the exclusion on the basis of attribute name (phone number, time zone, name, and others). Perform the following steps.
 - I. Click "Add" to add the attributes for which the exclusions will be setup.

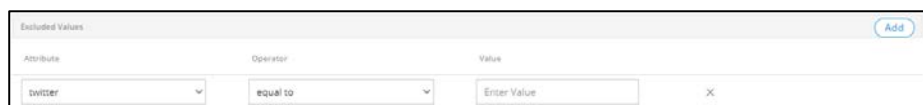


Figure: Add Attribute

- II. Here, the attribute will be the Table Definitions Columns, which are selected by the Administrator in its Console → "System" → "System Configuration" → "Table" → "Table".
- III. Select any of the following attributes in "Attribute" drop-down menu.
 - twitter
 - timezone

- facebook
 - phone2
 - name
 - phone3
 - phone4
 - phone5
 - email
 - phone1
- IV. Select any of the following operators in "Operator" drop-down menu.
- equal to
 - less than
 - less than or equal to
 - greater than
 - greater than or equal to
 - not equal to
 - Like
 - Not Like
 - SQL Expression
- V. Provide a value for the attribute. You can add multiple conditions. To delete a condition, click "X" icon for that condition.
- B. **Media Exclusion:** The Supervisor can upload the numbers in the respective lead which has to be added in DNC through "Media Exclusion". CSV file can have the Phone1 as lead header.

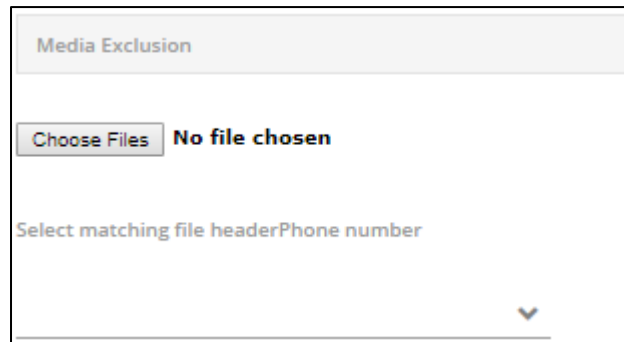


Figure: Media Exclusion

Perform the following steps.

- I. To upload the CSV file in the DNC lead, click on "**Choose Files**" button.
- II. Select the CSV file from the disk.

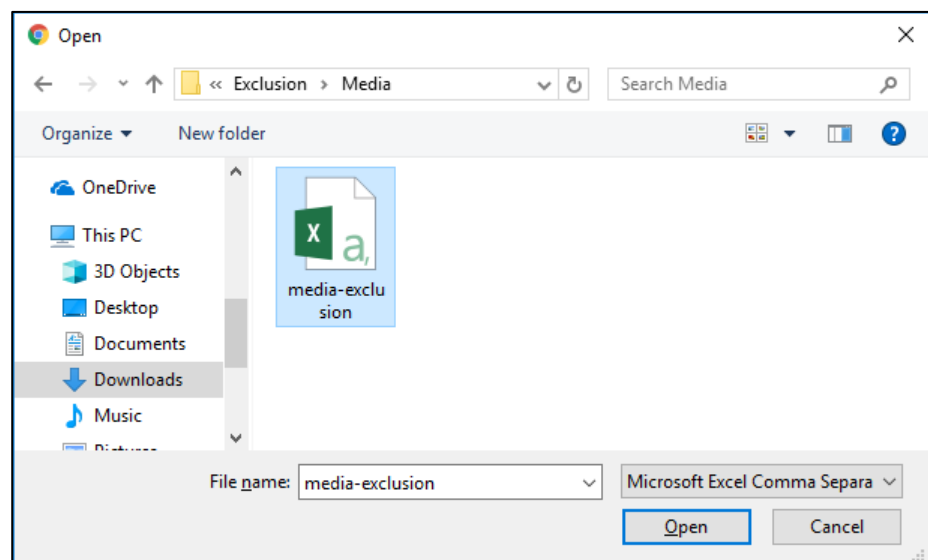


Figure: CSV File

- III. It takes you back to "DNC Tab". Select the media header.
- C. **Customer Exclusion:** The Supervisor can upload the customers in in the respective lead which has to be added in DNC through "Customer Exclusion". CSV file can have the customer_id as lead header.

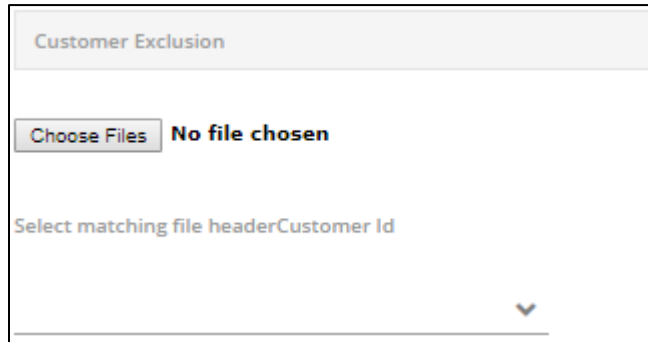


Figure: Customer Exclusion

Perform the following steps to add a Customer Exclusion.

- I. To upload the CSV file in the DNC lead, click on "**Choose Files**" button.

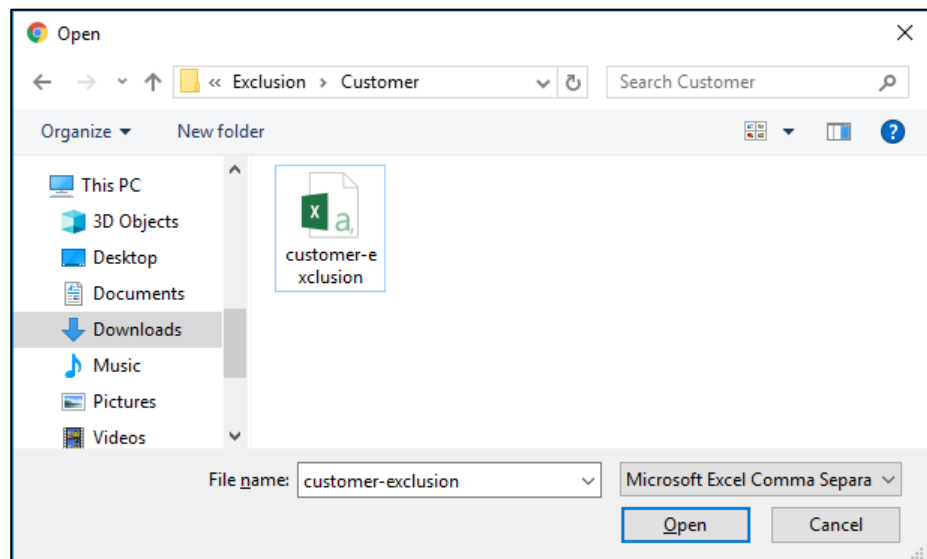


Figure: CSV File

- II. Select the CSV file from the disk and click "Open".
 - III. It takes you back to "DNC" Tab. select the header from the drop-down menu. Customer Exclusion will be added.
5. Click "**Save**" to save the exclusion lead.
Click "**Cancel**" to cancel the changes made.

Supervisor can edit and delete the Exclusion Leads.

3.3.2 Exclusion Data

This option lets the Supervisor fetch the Exclusion Data for the selected lead. Perform the following steps.

1. Click "Exclusion Data" button with or without selecting any exclusion lead.

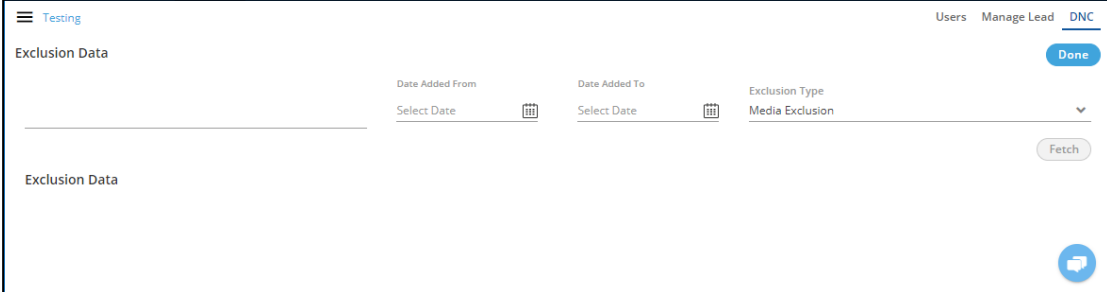


Figure: Exclusion Data

2. If you have not selected an exclusion lead, then you can select one or multiple Exclusion Leads.
However, if you have already selected "Exclusion Lead" while clicking "Exclusion Data" that lead will remain pre-selected.
3. Select the date added from.
4. Select the date added to.
5. Select any of the available exclusion types.
6. Click "Fetch" to fetch the exclusion data. A CSV file containing this exclusion data will be downloaded. You can select the location and name to save the file.

4. Monitor Tab

Supervisor can monitor the campaigns in which it has been assigned. The interface of this tab depends upon the type of campaign that you select in the left side navigation bar.

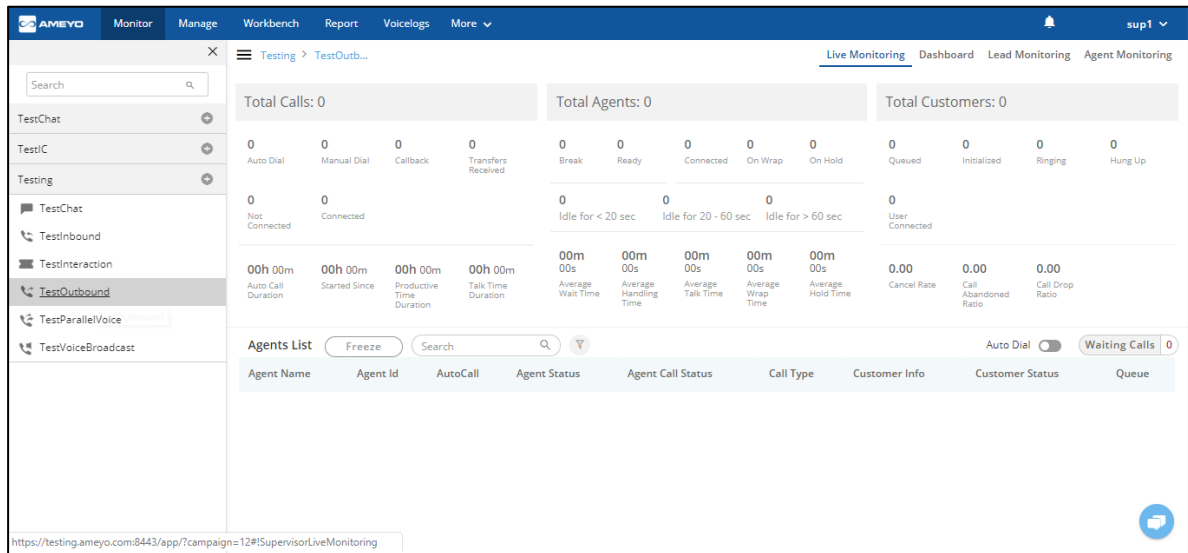



Figure: Monitor Tab

Its interface can be divided into the following parts.

- 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 select any of the assigned processes and campaigns.
- 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.
 - [Monitor Chat Campaign](#)
 - [Monitor Interaction Campaign](#)
 - [Monitoring Inbound Campaign](#)
 - [Monitor Outbound Campaign](#)
 - [Monitor Parallel Predictive Campaign](#)
 - [Monitor Voice Blast Campaign](#)

4.1 Monitor Chat Campaign

The Supervisor can monitor Chat Campaign in "Monitor Tab".

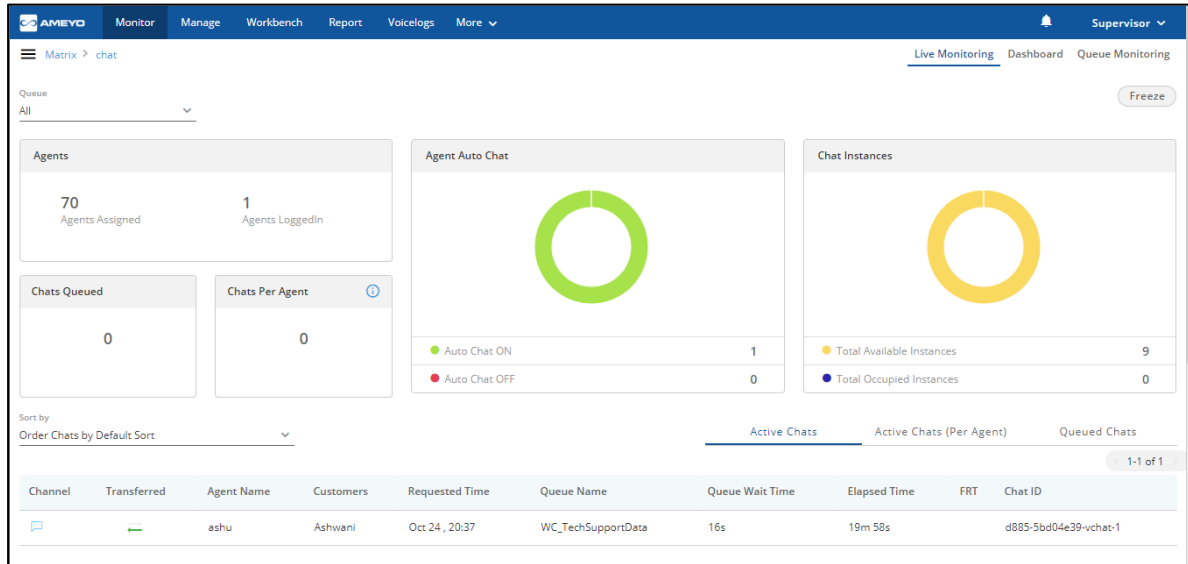


Figure: Monitor Chat Campaign

It contains the following tabs.

- **Live Monitoring:** It allows the Supervisor to perform live monitoring of Chat Campaign. [Know more...](#)
- **Dashboard:** View the Dashboard of Chat Campaign. [Know more...](#)
- **Queue Monitoring:** Monitor the queues in the Chat Campaign. [Know more...](#)

4.1.1 Live Monitoring of Chat Campaign

The Supervisor can perform Live Monitoring of Chat Campaign in "Monitor Tab".

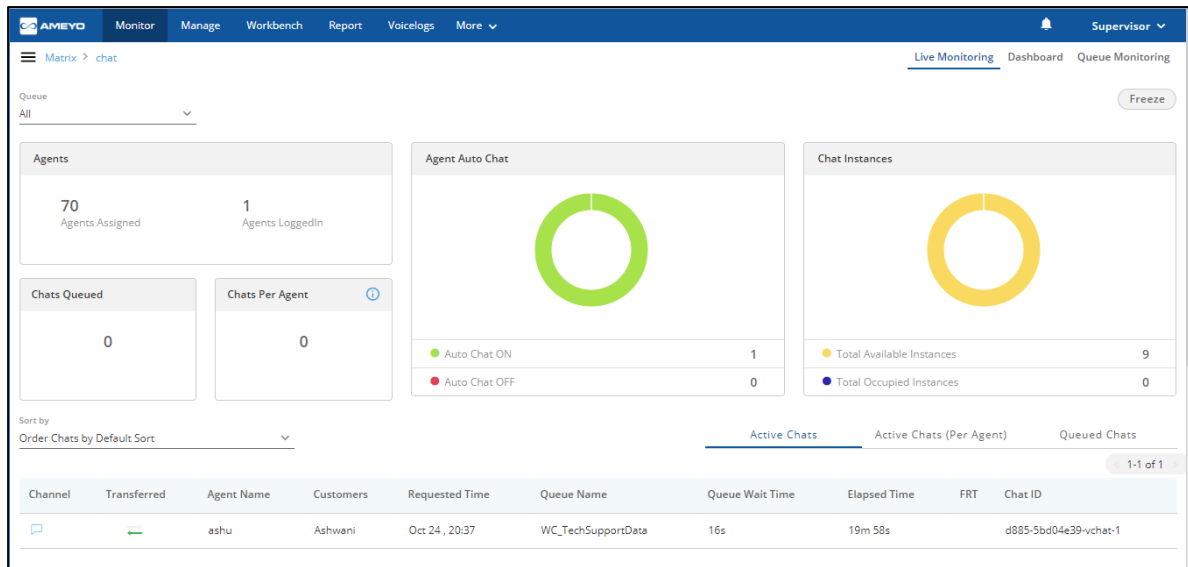


Figure: Monitor Chat Campaign

Following operations can be performed here.

4.1.1.1 Queue Selection

Use the drop-down menu located on top to select the queue. After selection, the Live Monitoring Tab shows the data specific to the selected queue only.

4.1.1.2 Freeze or Unfreeze

You can click "Freeze" to freeze "Live Monitoring" Tab at any point of time. No update in any graph or report will be reflected. You have to click "Unfreeze" unfreeze "Live Monitoring" Tab and let it receive latest updates.

4.1.1.3 View Graphs

The Dashboard contains the following graphs.

4.1.1.3.1 Agents

This graph shows the count of agents assigned and logged on to this campaign.

4.1.1.3.2 Chats Queued

This graph shows the count of chats that are queued.

4.1.1.3.3 Chats Per Agent

This graph shows the average count of chats per agent.

4.1.1.3.4 Agent Auto Chat

It shows the count of agents who have turned off or on for receiving chats automatically in the campaign.

4.1.1.3.5 Chat Instances

It shows the count of chat instances that are available and occupied.

4.1.1.4 View Live Chats

The bottom section shows the live chats. These chats are displayed in the following three tabs.

- **Active Chats:** It shows all chats that are active in the entire chat campaign.
- **Active Chats (Per Agent):** It shows the active chats per agent.
- **Queued Chats:** It shows the chats that are queued in the entire campaign.

4.1.1.5 Sort Live Chats

Use "Sort by" drop-down menu to sort the Chats in these three tabs. It contains the following options.

- **Order Chats by Default Sort:** Select it to keep default sorting to order the chats.
- **Order Chats by Elapsed Time (Descending):** Select it to sort the chats in the descending order of their elapsed time.
- **Order Chats by Elapsed Time (Ascending):** Select it to sort the chats in the ascending order of their elapsed time.

4.1.2 Dashboard of Chat Campaign

Here, the Supervisor can view the activities in the Chat Campaign.

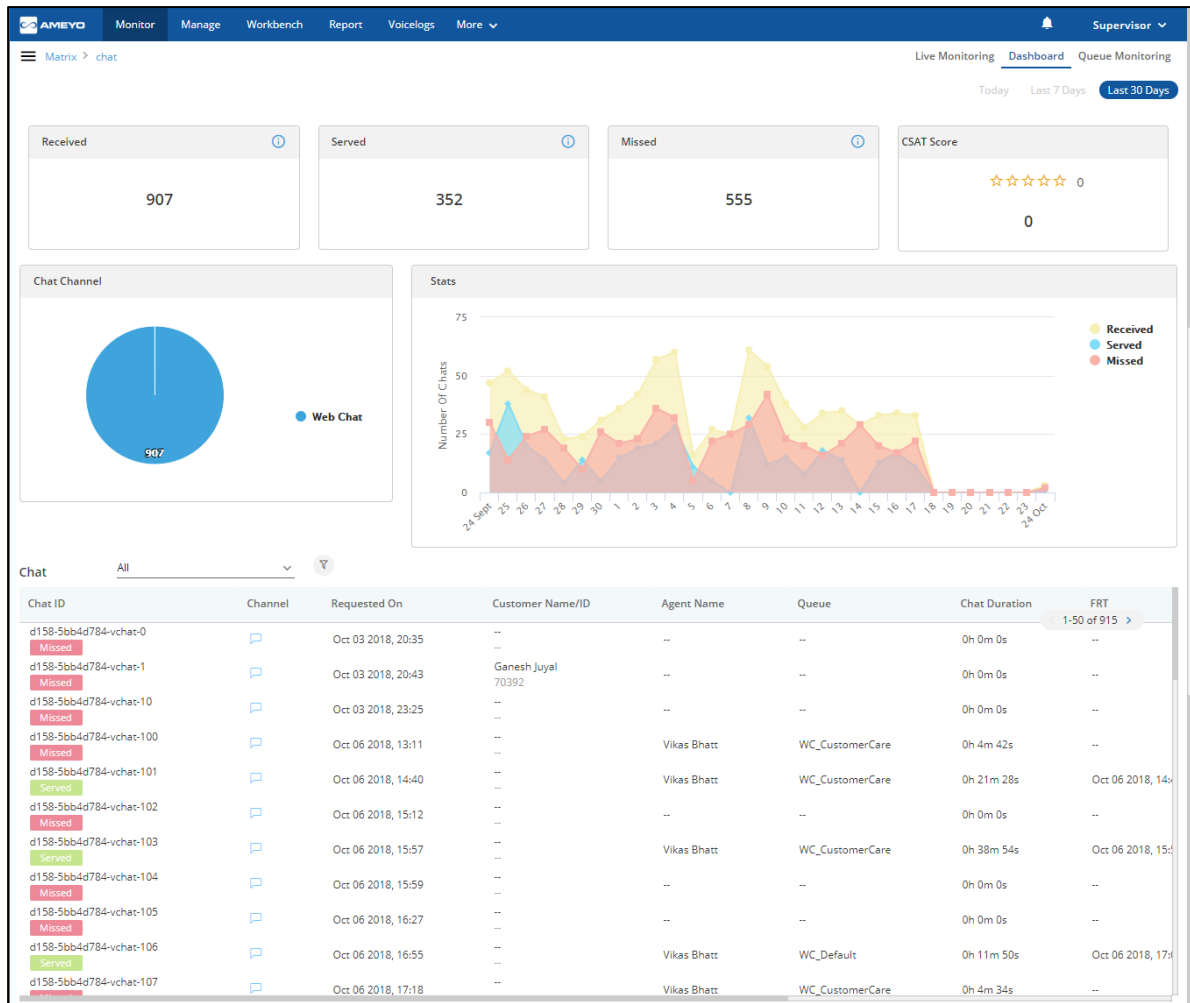


Figure: Dashboard of Chat Campaign

4.1.2.1 Time Durations

Select any of the following time durations to view the activities in the selected period only.

- **Today:** Click to view the activities in the selected campaign for the present day starting from 00:00 hour.
- **Last 7 Days:** Click to view the activities in the selected campaign for the last 7 days.
- **30 Days:** Click to view the activities in the selected campaign for the last 30 days.

4.1.2.2 Graphs

It shows the following graphs.

4.1.2.2.1 Received

It shows the count of received chats.

4.1.2.2.2 Served

It shows the count of served chats.

4.1.2.2.3 Missed

It shows the count of missed chats.

4.1.2.2.4 CSAT Score

It shows the number of feedbacks received from the customers divided by the number of feedback emails sent to the customers.


4.1.2.2.5 Chat Channel

It shows the graph on chat channels.

4.1.2.2.6 Stats

It shows the graphs of received, served, and missed chats.

4.1.2.2.7 Chat

Here, the supervisor can see the list of all chats, all served chats, or all missed chats in the campaign. Click  icon to access the filters.

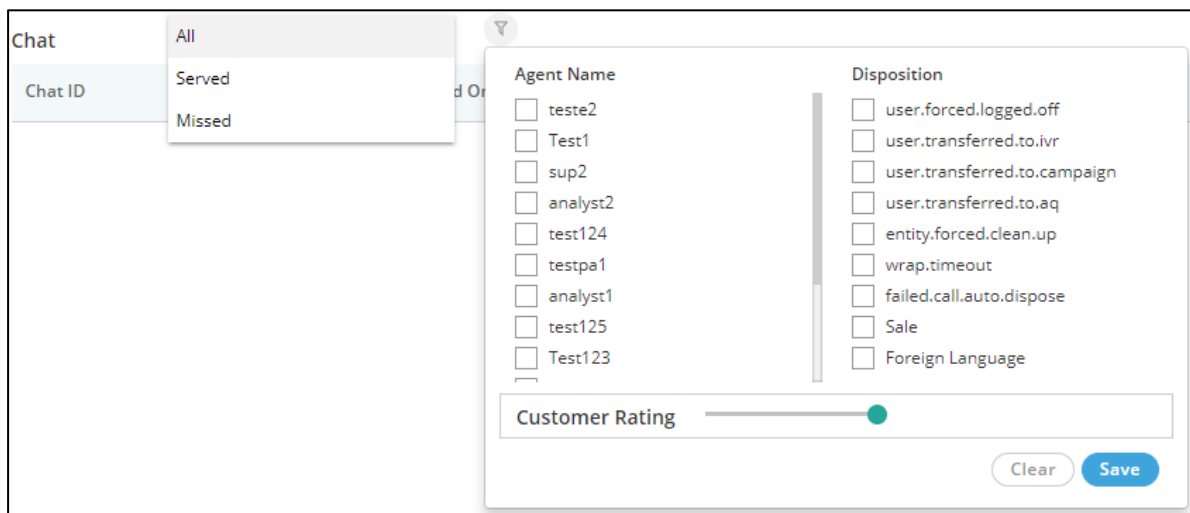


Figure: Filters

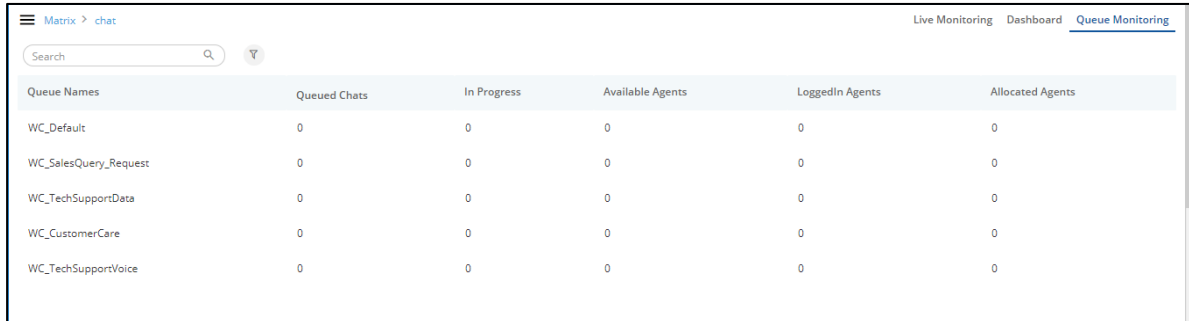
The Supervisor can filter the list of chats using any of the following filters.

- Agent Names
- Disposition Types

- Customer Rating

4.1.3 Queue Monitoring in a Campaign


Here, the Supervisor can monitor the activities in all queues of the Chat Campaign.



Queue Names	Queued Chats	In Progress	Available Agents	LoggedIn Agents	Allocated Agents
WC_Default	0	0	0	0	0
WC_SalesQuery_Request	0	0	0	0	0
WC_TechSupportData	0	0	0	0	0
WC_CustomerCare	0	0	0	0	0
WC_TechSupportVoice	0	0	0	0	0

Figure: Queue Monitoring of Chat Campaign

4.1.3.1 Filter

The Supervisor can click  icon to filter the list of chats as per the selected queue.

4.2 Monitor Interaction Campaign

Supervisor can monitor Interaction Campaign in "Monitor Tab".

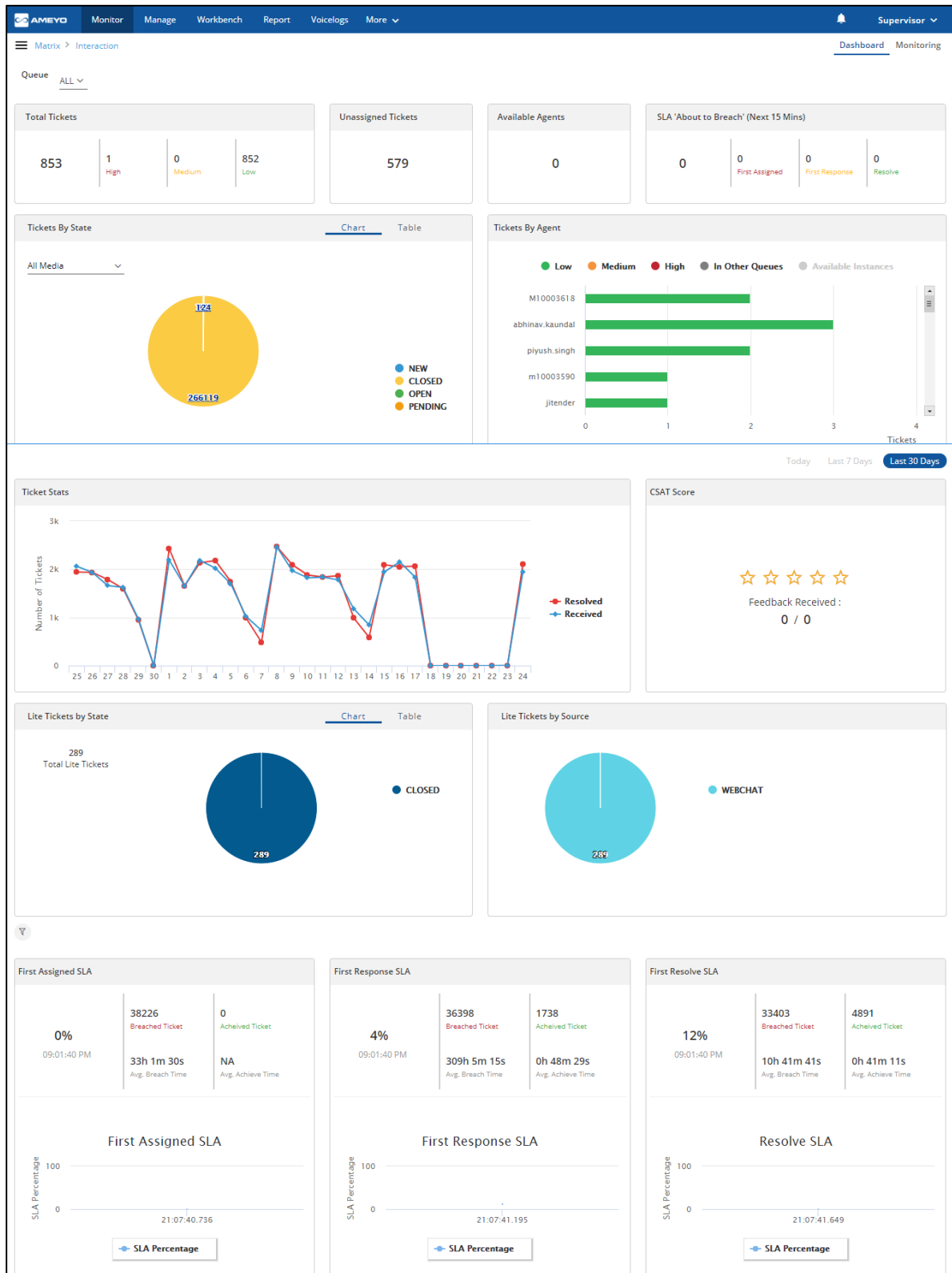


Figure: Monitor Interaction Campaign

It contains the following tabs.

- **Dashboard:** View Dashboard of Interaction Campaign. [Know more...](#)

- **Monitoring Tab:** Monitor the activities in Interaction Campaign. [Know more...](#)

4.2.1 Dashboard of Interaction Campaign

Here, Supervisor can monitor all activities in the Interaction Campaign.

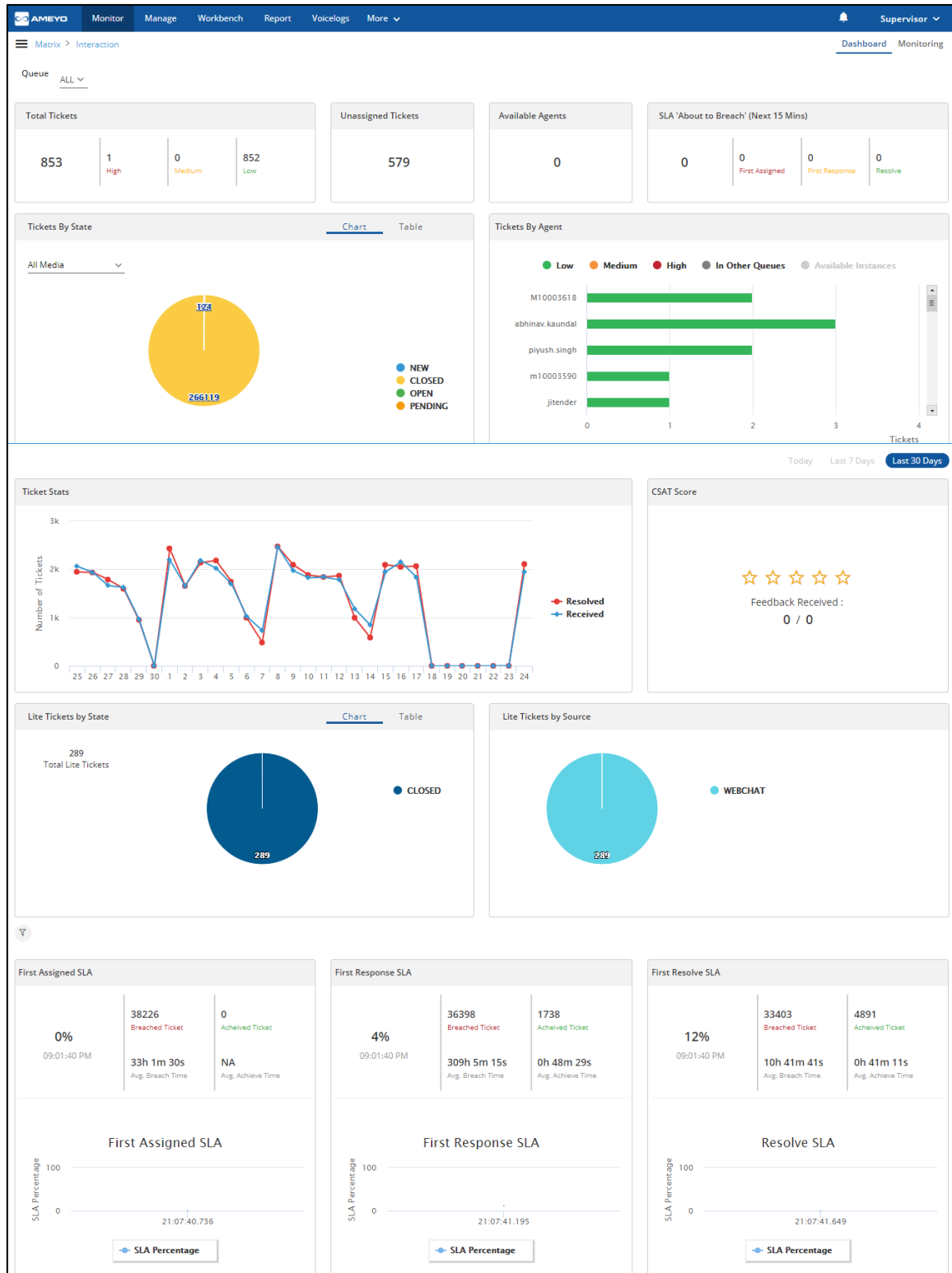


Figure: Dashboard of Interaction Campaign

In the top drop-down menu, you can select the queue to see the activities only in the selected queue.

4.2.1.1 Graphs

Dashboard for Interaction Campaign contains the following graphs.

4.2.1.1.1 Total Tickets

It shows the count of tickets with low priority, medium priority, and high priority.

4.2.1.1.2 Unassigned Tickets

It shows the count of all unassigned tickets.

4.2.1.1.3 Available Agents

It shows the count of available agents.

4.2.1.1.4 SLA "About to Breach" (Next 15 Minutes)

It shows the tickets with their status (First Assigned, First Response, or Resolved), of which SLA is about to breach within next 15 minutes.

4.2.1.1.5 Tickets by State

Here, the Supervisor can view the tickets by their states in both chart and table format. In chat format, the Supervisor can select any of the following values to view the count of tickets as per their states.

- **All Media:** Select it to view the tickets created for all media.
- **Chat:** Select it to view the chat tickets only.
- **Voice:** Select it to view the voice tickets only.
- **Email:** Select it to view the email tickets only.
- **Manual Message:** Select it to view the manual message tickets only.

Click "Table" to view the report on tickets in tabular format.

Tickets By State		
Source	Status	Number of Tickets
Manual Message	New_Call	1
Outbound Mail	New_Email	1
Manual Message	New_Email	1
Outbound Call	New_Call	8

Figure: Tickets by State

4.2.1.1.6 Tickets by Agent

It shows the tickets by agent with their priority, assigned agents, and in other queues.

4.2.1.1.7 Time Durations

Select any of the following time durations to view the activities in the selected period only.

- **Today:** Click to view the activities in the selected campaign for the present day starting from 00:00 hour.
- **Last 7 Days:** Click to view the activities in the selected campaign for the last 7 days.
- **30 Days:** Click to view the activities in the selected campaign for the last 30 days.

4.2.1.1.8 Ticket Stats

It shows the statistics of the tickets.

4.2.1.1.9 CSAT Score

It shows the number of feedbacks received from the customers divided by the number of feedback emails sent to the customers.

4.2.1.1.10 Lite Tickets by State

It shows the lite tickets by state.

4.2.1.1.11 Lite Tickets by Source

It shows the lite tickets by source.

4.2.1.1.12 First Assigned SLA

It shows the tickets with the first assigned SLA. It shows the count of tickets with both breached SLA and achieved SLA.


4.2.1.1.13 First Response SLA

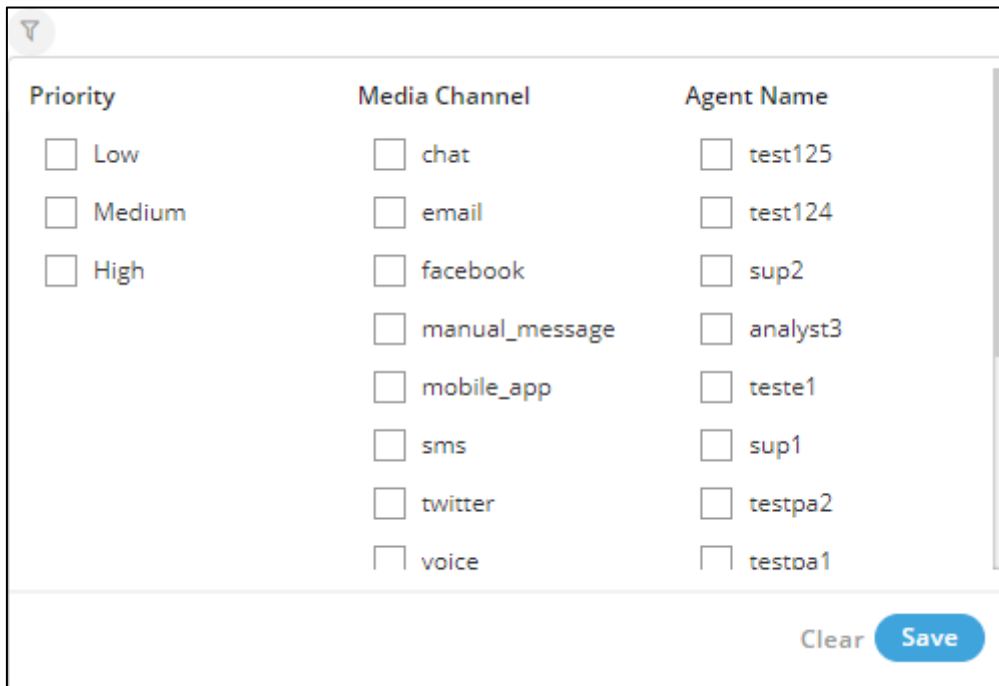
It shows the tickets with the first response SLA. It shows the count of tickets with both breached SLA and achieved SLA.

4.2.1.1.14 First Resolve SLA

It shows the tickets with the first resolve SLA. It shows the count of tickets with both breached SLA and achieved SLA.

4.2.1.1.15 Filter

Click  icon to filter the tickets being displayed in the above three SLA graphs.



Priority	Media Channel	Agent Name
<input type="checkbox"/> Low	<input type="checkbox"/> chat	<input type="checkbox"/> test125
<input type="checkbox"/> Medium	<input type="checkbox"/> email	<input type="checkbox"/> test124
<input type="checkbox"/> High	<input type="checkbox"/> facebook	<input type="checkbox"/> sup2
	<input type="checkbox"/> manual_message	<input type="checkbox"/> analyst3
	<input type="checkbox"/> mobile_app	<input type="checkbox"/> teste1
	<input type="checkbox"/> sms	<input type="checkbox"/> sup1
	<input type="checkbox"/> twitter	<input type="checkbox"/> testpa2
	<input type="checkbox"/> voice	<input type="checkbox"/> testoa1

Clear Save

Figure: Filter Options

It contains the following filters.

- Priority

- Low
- Medium
- High
- Media Channel
 - chat
 - email
 - facebook
 - manual_message
 - mobile_app
 - SMS
 - twitter
 - voice
- Agent Names

After selecting the filters, click "Save" to apply them. To clear the filters, click "Clear".


4.2.2 Monitoring Tab of Interaction Campaign

Here, Supervisor can monitor the agents as per different parameters.

The screenshot shows the 'Monitoring' tab in the Ameyo interface. At the top, there are five summary cards, each with a '0' and a label: 'Resolve SLA expiring in ...', 'Tickets reopened', 'Total tickets closed', 'First assigned SLA expir...', and 'First response SLA expir...'. Below these is a table with 14 columns: 'User Name', 'Assigned Tickets', 'Created', 'Reopened', 'Picked', 'Closed', 'Split', 'Merged', 'High priority', 'Mid priority', 'Low priority', 'Transfer to', 'Assigned to', and 'Unassign by supervi...'. The table lists 10 agents with their respective metrics. A legend at the bottom indicates: green dot for 'Ticket Assignment On', orange dot for 'Ticket Assignment Off', and red dot for 'Logged Out'.

User Name	Assigned Tickets	Created	Reopened	Picked	Closed	Split	Merged	High priority	Mid priority	Low priority	Transfer to	Assigned to	Unassign by supervi...
Abhinav Kaundal	3	0	0	0	0	0	0	0	0	3	0	0	0
Arpita Shilpi jaiswal	18	0	0	0	0	0	0	0	0	18	0	0	0
ashu	15	10	0	13	1	0	0	1	0	14	0	0	1
avaya1	11	0	0	0	0	0	0	0	0	11	0	0	0
Avaya2	20	0	0	0	0	0	0	0	0	20	0	0	0
Jitender	1	0	0	0	0	0	0	0	0	1	0	0	0
Karan Panwar	2	0	0	0	0	0	0	0	0	2	0	0	0
Ujjwal Kumar Srivastava	1	0	0	0	0	0	0	0	0	1	0	0	0
Itiyant Tyagi	3	0	0	0	0	0	0	0	0	3	0	0	0
Kuldeep Lohia	2	0	0	0	0	0	0	0	0	2	0	0	0

Figure: Monitor Tab

It shows the data for any five selected parameters at any point of time. You can click  icon to select the parameters.

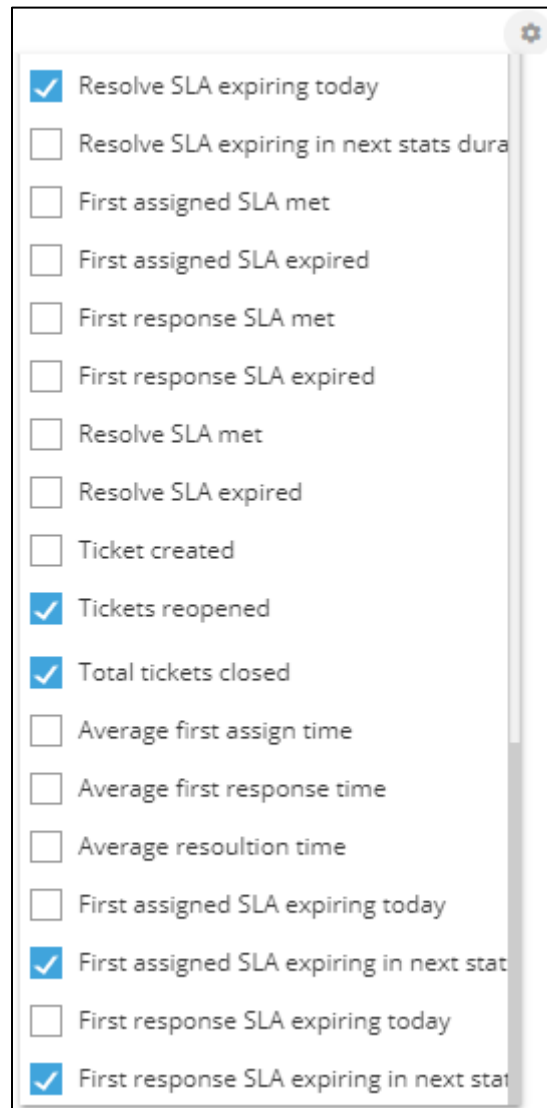


Figure: Parameters

It contains the following values. You can select any five of them at any point of time.

- Resolve SLA expiring today
- Resolve SLA expiring in next stats duration
- First assigned SLA met
- First assigned SLA expired
- First response SLA met
- First response SLA expired

- Resolve SLA met
- Resolve SLA expired
- Ticket created
- Tickets reopened
- Total tickets closed
- Average first assign time
- Average first response time
- Average resolution time
- First assigned SLA expiring today
- First assigned SLA expiring in next stats duration
- First response SLA expiring today
- First response SLA expiring in next stats duration

4.3 Monitor Inbound Campaign

Here, Supervisor can monitor the Inbound Campaign.

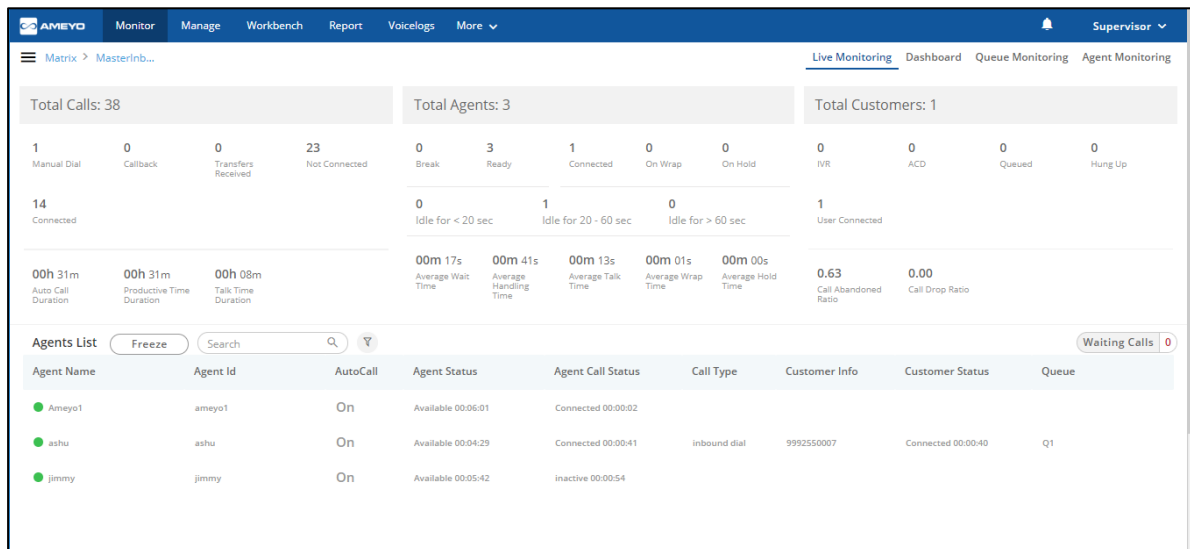


Figure: Monitor Inbound Campaign

It contains the following tabs.

- **Live Monitoring:** Perform Live Monitoring of Inbound Campaign. [Know more...](#)

- **Dashboard:** View Dashboard of Inbound Campaign. [Know more...](#)
- **Queue Monitoring:** Monitor the queues. This tab has been discussed already in Chat Campaign. [Know more...](#)
- **>Agent Monitoring:** Monitor the agents in the campaign. [Know more..](#)

4.3.1 Live Monitoring of Inbound Campaign

Here, Supervisor can monitor the activities in Inbound Campaign.

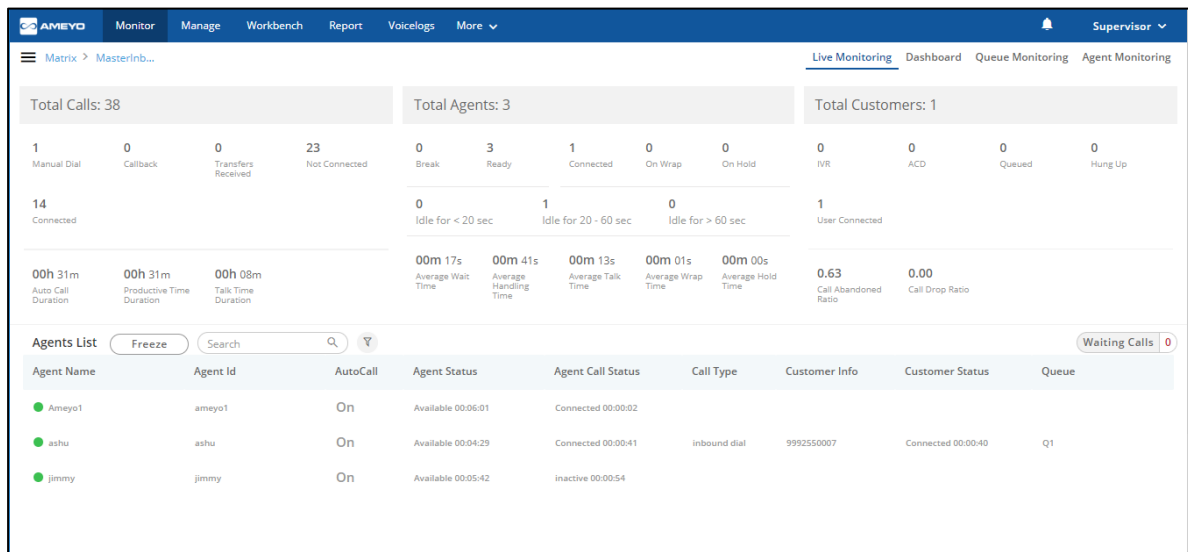



Figure: Live Monitoring

Here, Supervisor can perform the following operations.


4.3.1.1 Freeze or Unfreeze

You can click "Freeze" to freeze "Live Monitoring" Tab at any point of time. No update in any graph or report will be reflected. You have to click "Unfreeze" unfreeze "Live Monitoring" Tab and let it receive latest updates.

4.3.1.2 Search

Supervisor can search data for particular agent or customer by entering the username or customer info in the provided text box and clicking  icon.

4.3.1.3 Filter

Supervisor can click  icon to filter the data as per the available filters.

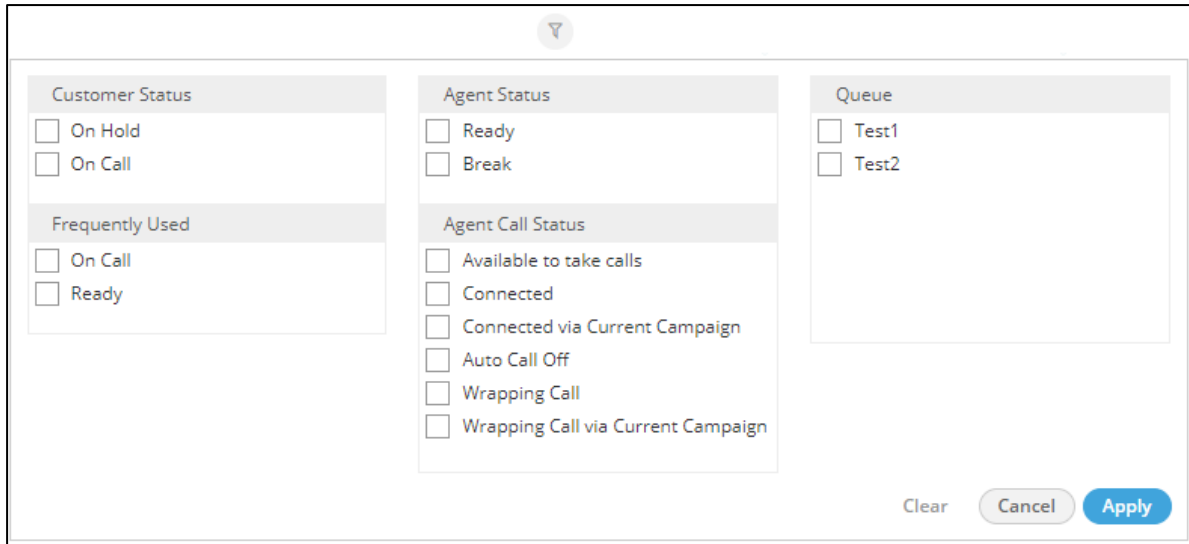


Figure: Filtration

4.3.1.4 Monitoring a Call

Supervisor can click any on any record on live monitoring screen to access a floating window.

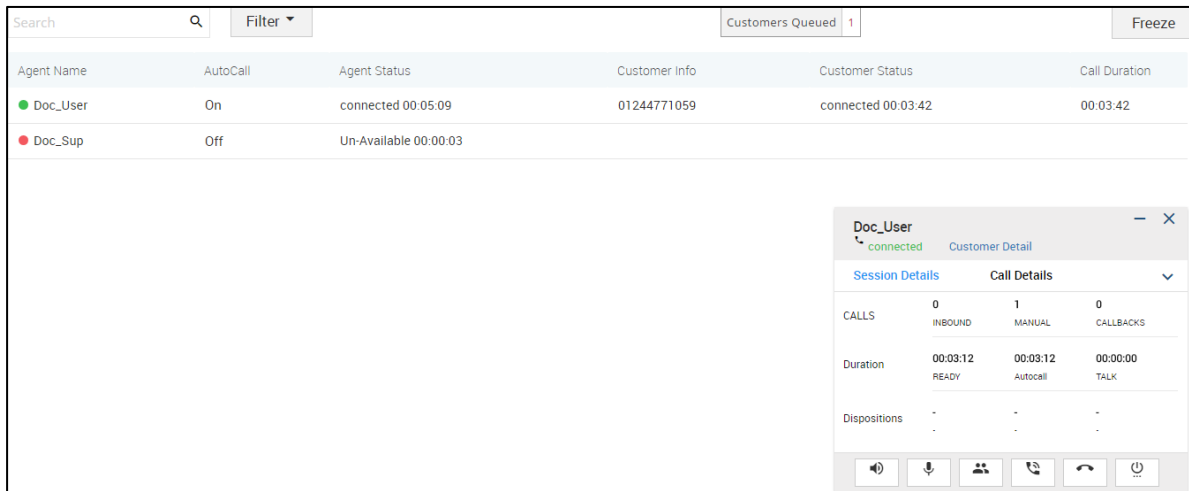


Figure: Live Monitoring of a Call

It will show agent name, status (inactive/ connected/ hung up), Customer Details (on clicking on this, CRM gets open in preview mode) along with below mentioned tabs.

4.3.1.5 Session Details

- **Calls:** Count of Autodial (in case of Outbound campaign)/ Inbound (in case of Inbound campaign), Manual and Callback calls.
- **Duration:** Total Ready, Auto-call (Auto-call On) and Talk (talk time) duration.

- **Dispositions:** It shows top 3 dispositions.

4.3.1.6 Call Details


- **Customer:** It will show Details (customer's phone number), Status (inactive/ connected/ hung up) and Duration (talk time).
- **Details:** It will show Campaign (Campaign name in which the call has been received/ from which call has been dialed), Lead (Lead Name in case of Outbound campaign) / Queue (Queue Name in case of Inbound campaign) and Call Type (inbound/auto dial/manual dial).

4.3.1.7 Monitoring Operations

Supervisor can snoop, whisper, conference, barge and Hang-up the call using the buttons provided at the bottom of the floating panel. These buttons will only get highlighted in case the agent is on a call except Force Logout (which will be highlighted irrespective whether the agent is on call or not). Supervisor can minimize or maximize floating window using up and down arrow icons respectively.


4.3.1.7.1 Snoop

This feature can be used if supervisor wants to listen to the conversation of agent and customer on live call. Supervisor needs to follow below steps to snoop a call.

1. Select the record of an agent who is on a live call, the floating window will open with the  (**Snoop**) button enabled.
2. Click on Snoop button to connect in between the call in Snooping mode.
3. While snooping a call, both agent and caller will remain unaware of supervisor's activity.
4. To end the snoop call, click same button again.

4.3.1.7.2 Whisper


This feature can be used if supervisor wants to guide agent on call. Supervisor can connect in between the live call and can assist agent accordingly. Supervisor needs to follow below steps.

1. Select the record of an agent who is on a live call, the floating window will open with  (**Whisper**) button enabled.


2. Click Whisper button to connect in between the call in Whisper mode.
3. Customer will only hear the voice of the agent (not the Supervisor).
4. The Supervisor can end whisper call by clicking the same button again.

4.3.1.7.3 Conference


This feature can be used if supervisor wants to force confer a live call. Supervisor needs to follow below steps to force confer a call.

1. Select the record of an agent who is on a live call, the floating window will open with the  (**Conference**) button enabled.
2. Click confer button to connect in between the call.
3. The Supervisor can end conference call by clicking the same button again.

4.3.1.7.4 Barge

1. Select the record of an agent who is on a live call, the floating window will open with the  (**Barge**) button enabled.
2. Click barge button to connect in between the call.
3. CRM will be popped up on supervisor workbench automatically.
4. Now, Supervisor is the owner of the call and can dispose the call by selecting a disposition. Agent can still listen to the conversation of customer and supervisor on mute-mode. Note that agent goes on Mute-mode automatically during barge.


4.3.1.7.5 Hang-up

Supervisor can force hang-up the live call of any agent by clicking on  icon. Both customer's and agent's channel will be disconnected.

4.3.1.7.6 Force Logout an Agent

The Supervisor can force logout an agent from system at any moment.

1. Select the record of the required agent in live monitoring screen, the floating window opens up.

- The Supervisor can click  icon to logout a user forcefully. The following pop-up is displayed on the screen.

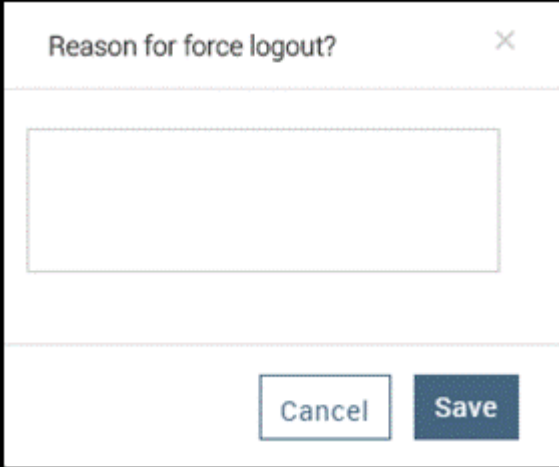


Figure: Force Logout Reason

by clicking this icon.

- Here, Supervisor has to provide the reason for the force logout of agent.
- After entering the reason, the supervisor needs to provide confirmation on session termination by clicking on **"Save"** button.
- After supervisor's confirmation, the agent will be logged out from Ameyo forcefully.

4.3.2 Dashboard for the Inbound Campaign

The Dashboard tab provides the overall view of all activities going on in the selected Inbound campaign.

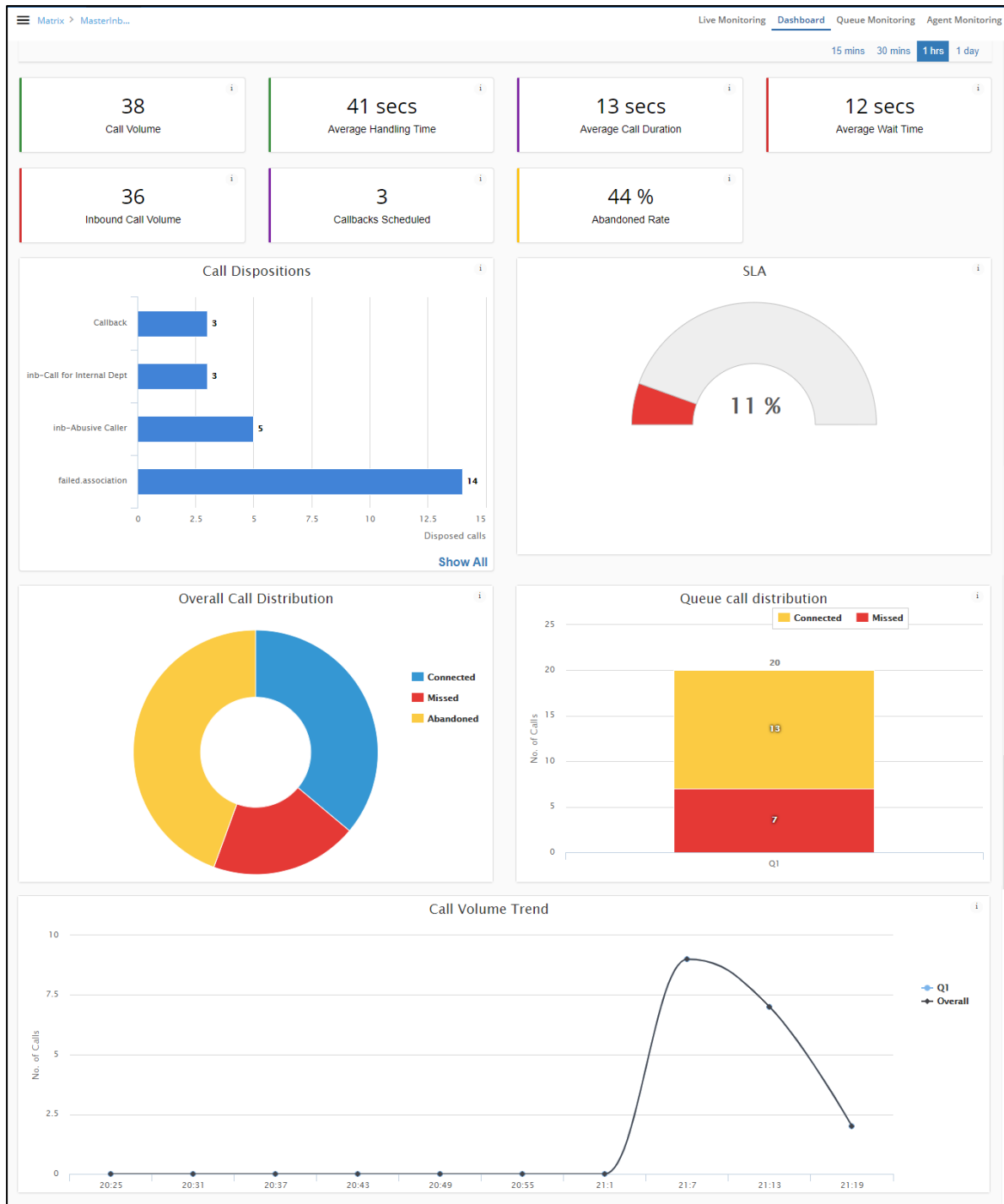


Figure: Inbound Campaign Dashboard

4.3.2.1 Time Durations

The Supervisor can view the recent activities of contact center for selected campaigns as per the following time durations

- **15 minutes:** Click to view the activities in the selected campaign for the last 15 minutes.
- **30 minutes:** Click to view the activities in the selected campaign for the last 30 minutes.
- **1 hour:** Click to view the activities in the selected campaign for the last one hour.
- **1 day:** Click to view the activities in the selected campaign for the present one day starting from 00:00 hour.

It contains the following graphs.

4.3.2.1.1 Call Details

In this section, the supervisor can view the overall call summary of the selected inbound campaign and time duration.

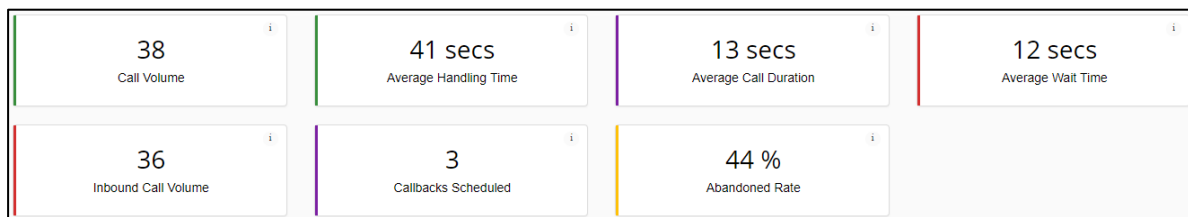


Figure: Call Details

- **Call Volume:** It is the total no of calls made in campaign
- **Average Speed to Answer:** It is the average of sum of setup time and ringing time. Setup time is the time taken to connect the call to the agent after customer has been received the call(OB campaign, setup time is zero in case of IB campaign). Ringing time is the time taken by agent to answer the call after call has been connected to his extension.
- **Average Call Duration:** It shows the average time taken by the agents on a call speaking to the customer.
- **Average Wait Time:** It shows the average time a call waited in the queue to be answered by an agent.
- **Average Handling Time:** it is the average of sum of call talk time and wrap time excluding hold time

- **Abandoned Rate:** It shows the percentage of calls which are abandoned.
- **Callbacks Scheduled:** total no of callbacks scheduled in the campaign (both user and campaign level included).

4.3.2.1.2 Call Dispositions

It shows the count of calls disposed with top 4 user dispositions.

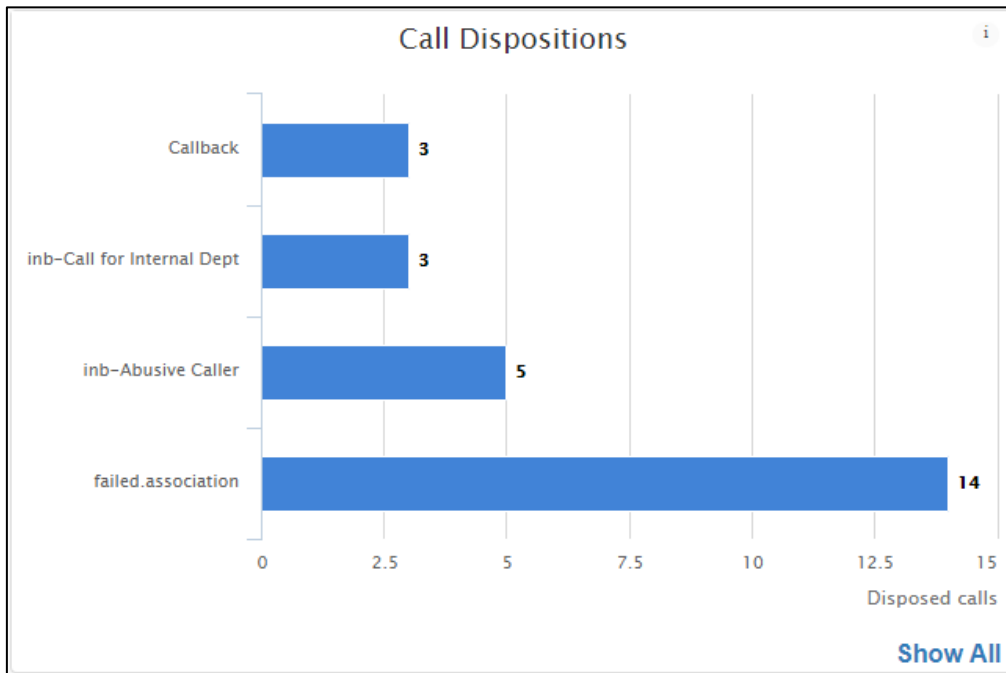


Figure: Call Dispositions Graph

The Supervisor can view the following information here.

- **Count of Disposed calls:** It is the X-axis of the graph, which shows the total number of calls disposed with different user disposition in the respective campaigns.
- **User Dispositions:** It is the Y-axis of the graph, which shows 5 campaign names in which highest number of calls are disposed by agents among all selected campaigns.

On hovering the mouse cursor on the bars of the dispositions, the supervisor can view the count of calls disposed in the respective campaign. Supervisor can click on "Show All" option to see count of call with all the dispositions selected.

Call Disposition	
Disposition	Count
Sale	2
Callback	1
failed.association	2
Customer volume too low	1
Voice breakage	2

Figure: All Dispositions

4.3.2.1.3 SLA

This Gauge chart shows the SLA % that is the rate of calls answered within 30 seconds out of all offered calls in the respective campaign.

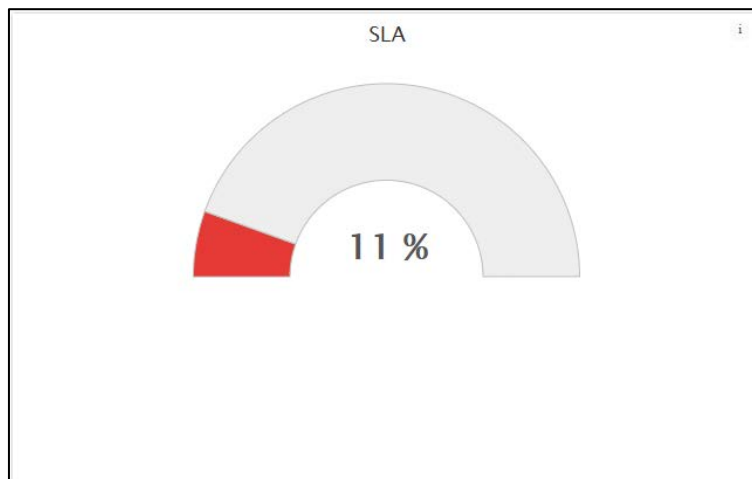


Figure: SLA Chart

4.3.2.1.4 Resolved Disposition

Few user dispositions will be assigned by Ameyo team (and will be hard coded) in resolved disposition category from backend as per client's requirement. This graph shows the

percentage of calls disposed with the user disposition that falls in resolved disposition category.

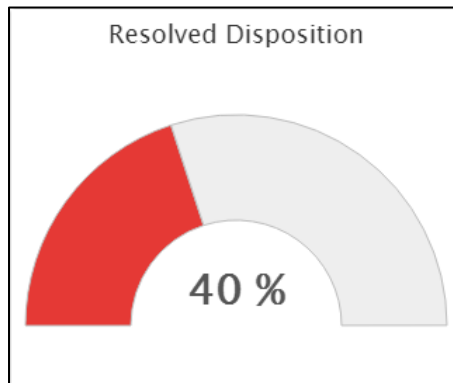


Figure: Chart of Resolved Dispositions

4.3.2.1.5 Overall Call Distribution

Doughnut pie chart shows the segments of calls(in percentage) disposed with different system dispositions.

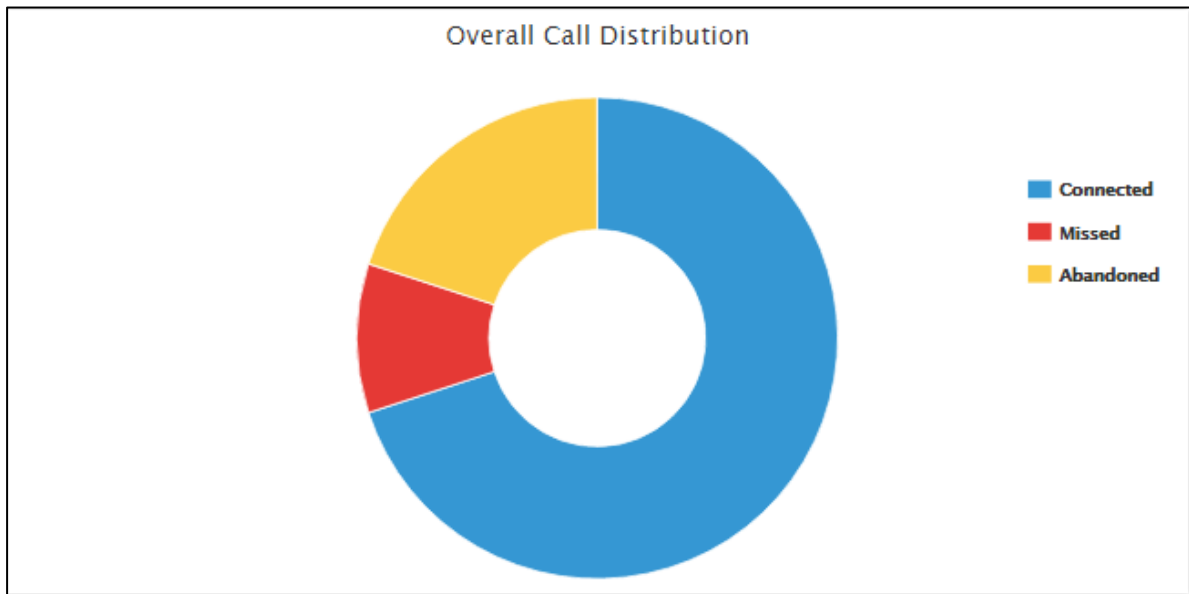


Figure: Call Distribution Graph

On hovering the mouse cursor over the segment of disposition, the supervisor can view the percentage of call disposed with respective system disposition.

4.3.2.1.6 Queue Call Distribution

It shows the count of missed calls, abandoned calls and connected calls across different queues of respective inbound campaign.

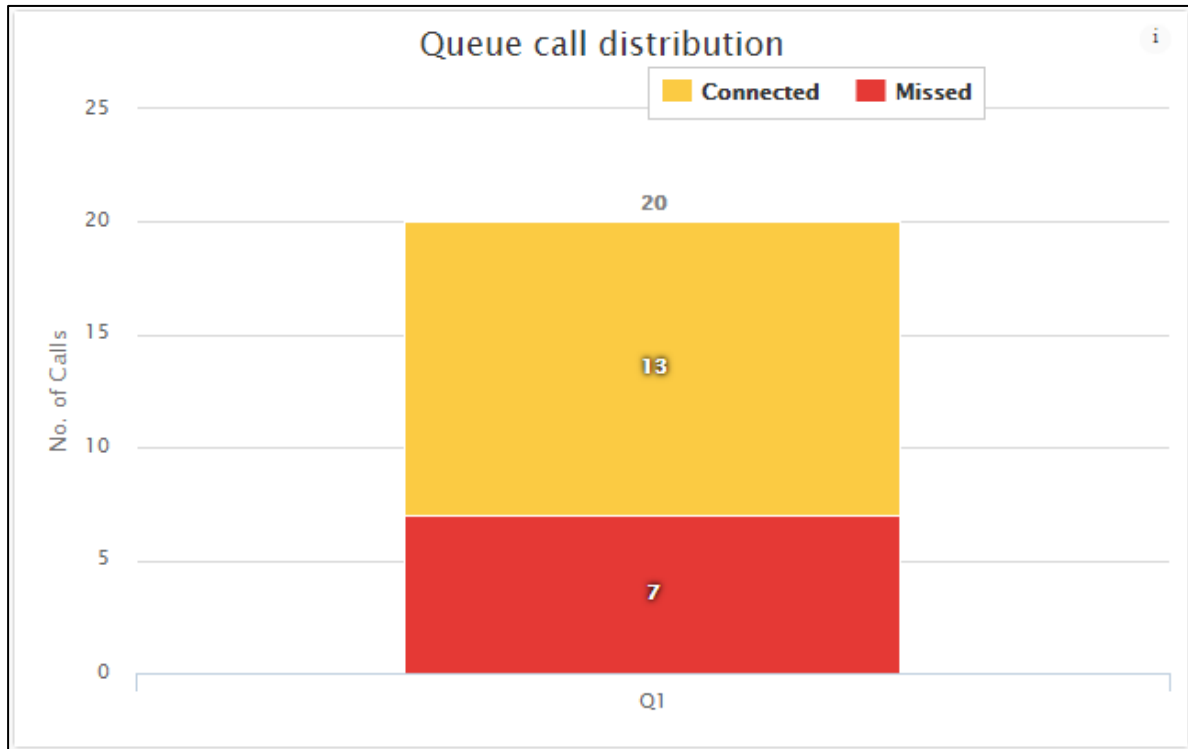


Figure: Call Distributions

The Supervisor can view the following information here.

- **Queue Names:** It is the X-axis of the graph, which shows the queue names in which abandoned call count is highest among all selected queues.
- **Abandoned call count:** It is the Y-axis of the graph, which is the total number of calls which got abandoned in the respective queues before getting connected with an agent.

On hovering the mouse cursor on the bars of the queue, user will be able to view the total number of calls received, total number of calls answered out of that and exact number of calls which got abandoned in the respective queue.

4.3.2.1.7 Call Volume Trend

This line graph shows number of calls with respect to different time intervals.

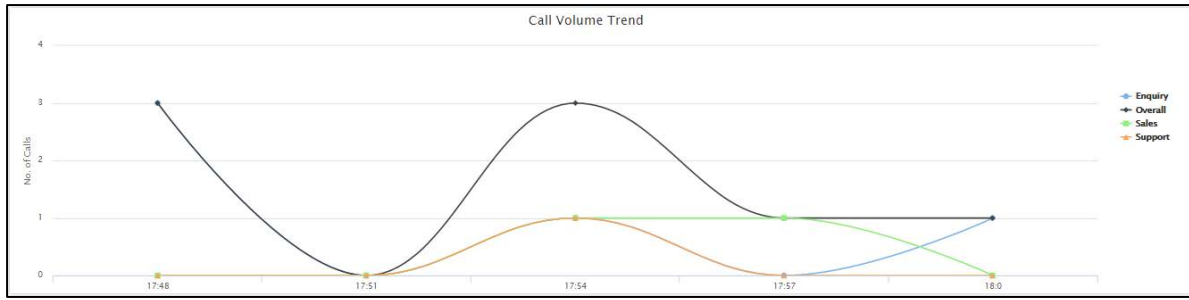


Figure: Trend of Call Volume

The Supervisor can view the following information here.

- **Time Interval:** It is the X-axis of the graph, which shows the time interval at which number of calls dialed/received.
- **Number of Calls:** It is the Y-axis of the graph, which shows the count of calls dialed/received at a particular time interval.

On hovering the mouse cursor on the bars of a lead, the supervisor can view the count of calls at a particular time.

4.3.3 Agent Monitoring in a Campaign

Here, you can monitor the activities of agents in the Inbound Campaign.

Agent Name	Agent Id	Login Hours	Break Time	Ready Hours	Auto Hours	Talk Hours	Wrap Hours	Call Handled	Average Answer Speed	Average Call Duration	Average Handling Time	Average Hold Time
ashu	ashu	00:14:31	00:00:00	00:14:31	00:14:31	00:00:00	00:01:21	8	00:00:05	00:00:28	00:00:39	00:00:00
jimmy	jimmy	04:18:56	00:01:20	04:17:36	04:17:36	00:01:20	00:01:07	11	00:00:03	00:00:39	00:00:45	00:00:00

Figure: Agent Monitoring

You can perform the following operations here.

4.3.3.1 Search

You can search for a particular agent to view its details.

4.3.3.2 Customize the View

You can click  icon to select the columns that you want to show on the screen.

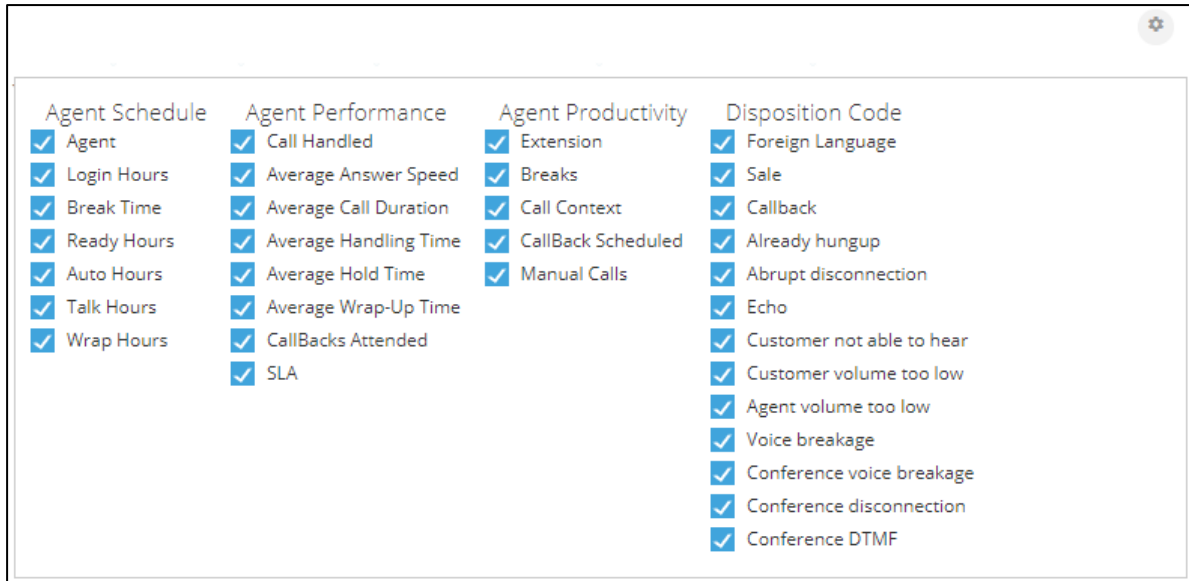


Figure: Column Headers

Select the column headers that you want to display on the Agent Monitoring Page.

4.4 Monitor Outbound Campaign

Here, Supervisor can monitor the Outbound Campaign.

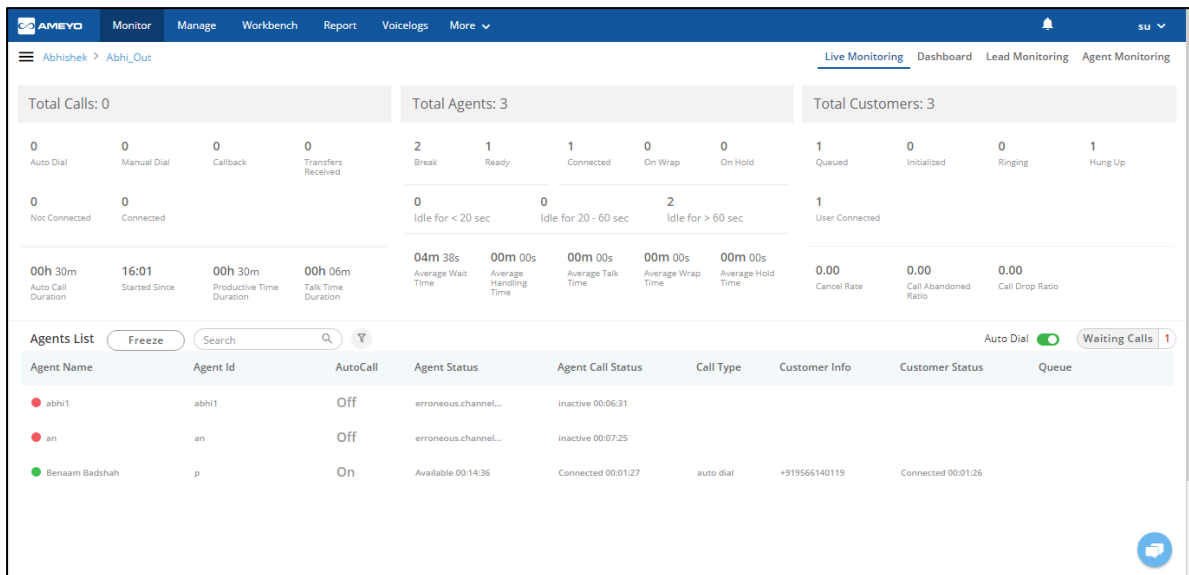


Figure: Monitor Outbound Campaign

It contains the following tabs.

- **Live Monitoring:** Perform the Live Monitoring in the campaign. This tab has already been discussed in the Inbound Campaign. [Know more...](#)
- **Dashboard:** View Dashboard of Outbound Campaign. [Know more...](#)
- **Lead Monitoring:** Monitor the leads in the Outbound Campaign. [Know more...](#)
- **Agent Monitoring:** Monitor the agents in the campaign. This tab has already been discussed in the Inbound Campaign. [Agent Monitoring](#)

4.4.1 Dashboard of Outbound Campaign

The dashboard tab of Outbound campaign shows the following items.

- Call Details
- Call Dispositions
- Overall Call Distribution
- Lead Penetration trend
- Lead Performance
- Call Volume Trend

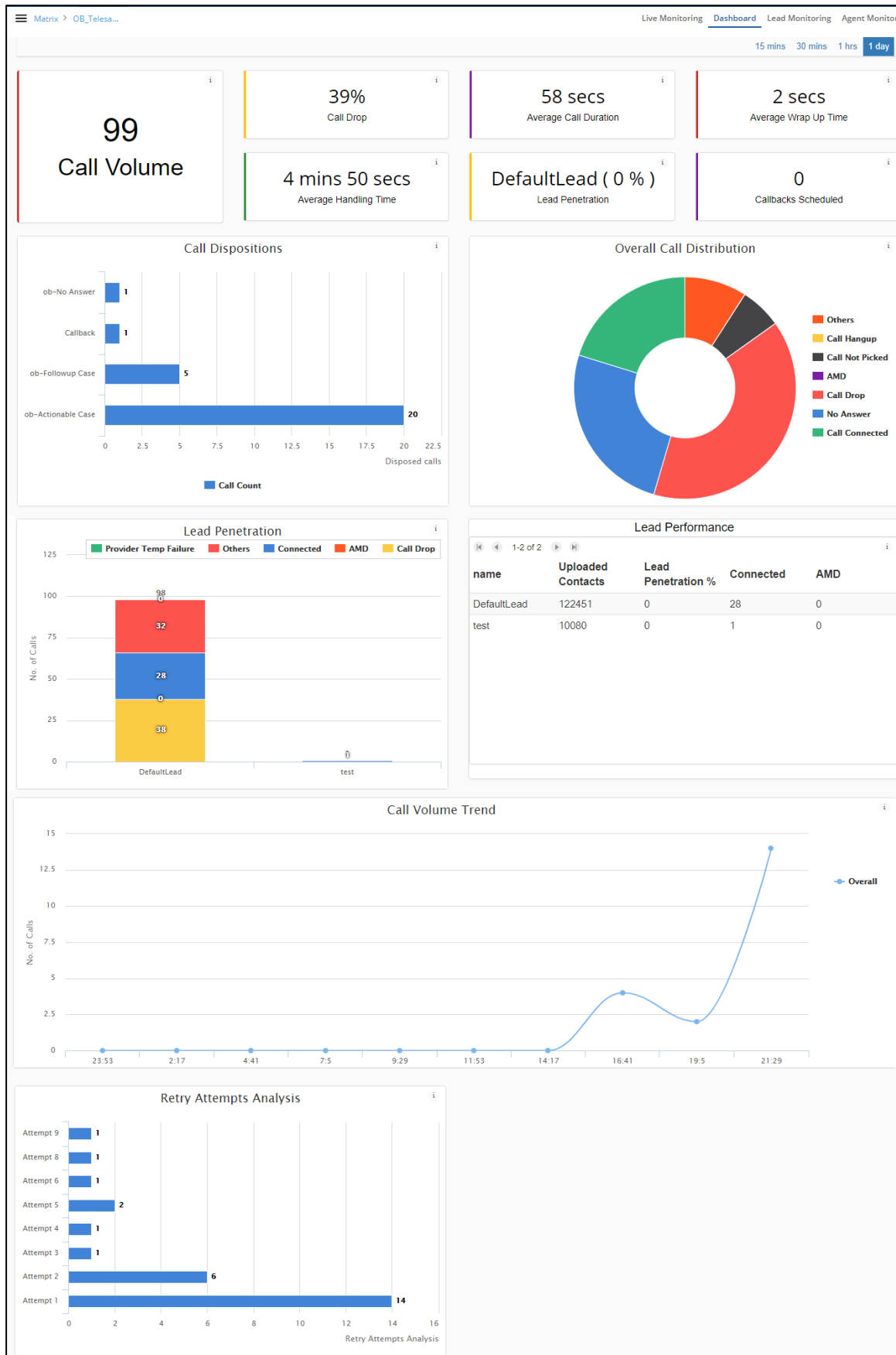


Figure: Outbound Campaign Dashboard

4.4.2 Time Durations

The Supervisor can view the recent activities of contact center for selected campaigns as per the following time durations

- **15 minutes:** Click to view the activities in the selected campaign for the last 15 minutes.
- **30 minutes:** Click to view the activities in the selected campaign for the last 30 minutes.
- **1 hour:** Click to view the activities in the selected campaign for the last one hour.
- **1 day:** Click to view the activities in the selected campaign for the present one day starting from 00:00 hour.

It contains the following sections.

4.4.2.1 Call Details

In this section, supervisor can view the overall call summary of the selected outbound campaign and time duration.

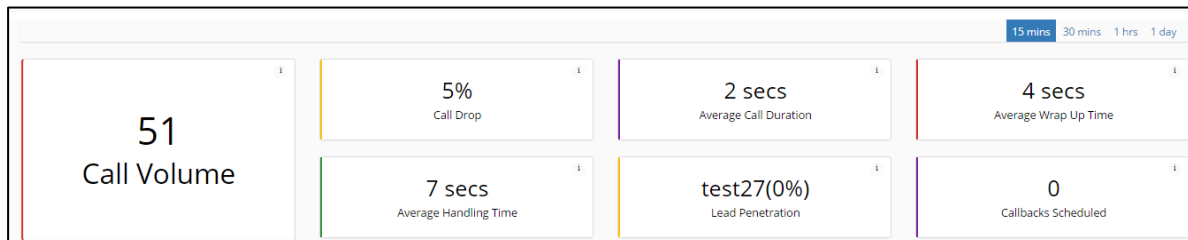


Figure: Call Details

1. **Call Drop:** A call that was connected to customer but not to agent.
2. **Average Call Duration:** It shows the average time taken by the agents on a call speaking to the customer.
3. **Average Wrap Up Time:** Time taken by agent to wrap up the call (, that is, dispose or update CRM) after call has been hung up.
4. **Average Handling Time:** it is the average of sum of call talk time and wrap time excluding hold time
5. **Lead Penetration:** It is the percentage of tried calls in a lead.

6. **Callbacks Scheduled:** total number of callbacks scheduled in the campaign (both user and campaign level included)
7. **Call Volume:** It is the total number of calls made from a campaign auto-dial, manual-dial, or both.

4.4.2.2 Call Dispositions

It shows the graph displaying the count of calls disposed with top 4 user dispositions.

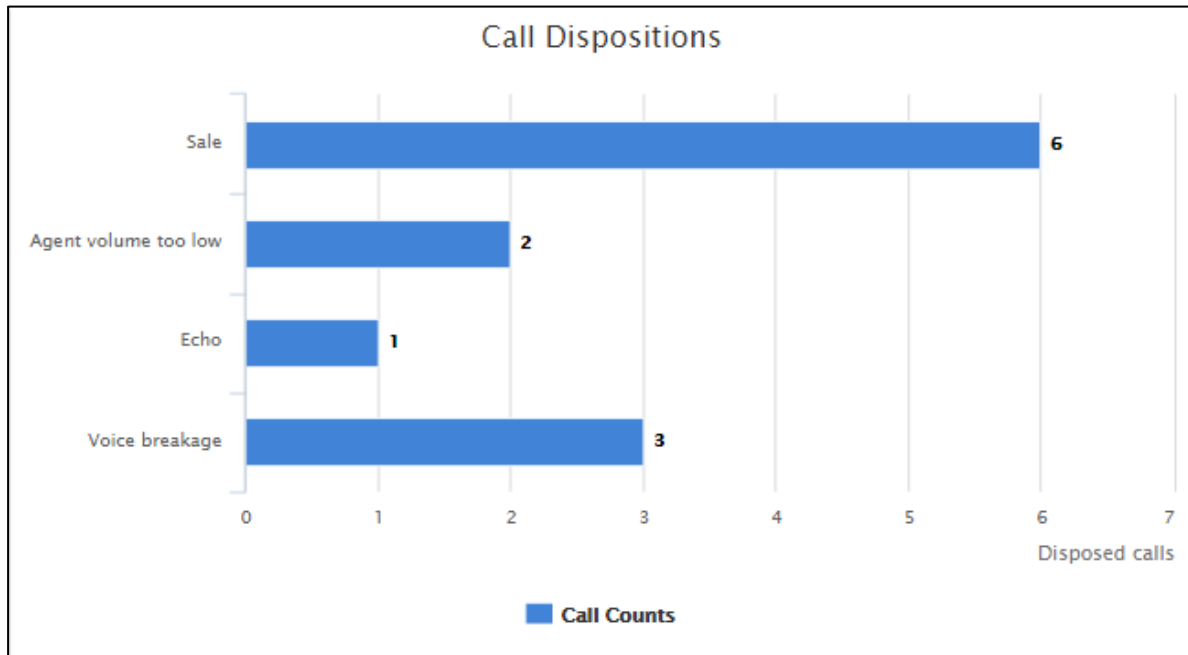


Figure: Call Dispositions Graph

The Supervisor can view the following information here.

- **Count of Disposed calls:** It is the X-axis of the graph, which shows the total number of calls disposed with different user disposition in the respective campaigns.
- **User Dispositions:** It is the Y-axis of the graph, which shows 5 campaign names in which highest number of calls are disposed by agents among all selected campaigns.

On hovering the mouse cursor on the bars of the disposition, the supervisor will be able to view the count of calls disposed in the respective campaign.

4.4.2.3 Overall Call Distribution

Doughnut pie chart shows the segments of calls(in percentage) disposed with different system dispositions.

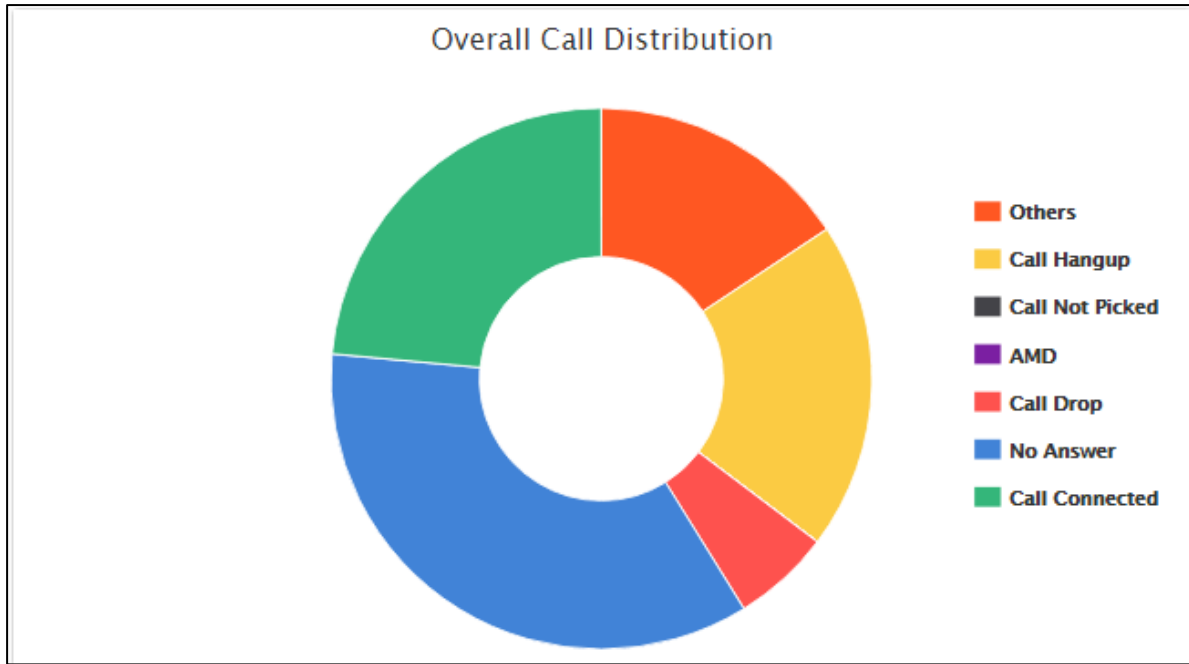


Figure: Call Distribution Graph

On hovering the mouse cursor over the segment of disposition, the supervisor will be able to view the percentage of call disposed with respective system disposition.

4.4.2.4 Lead Penetration

This bar graph shows the count of calls disposed with different system disposition.

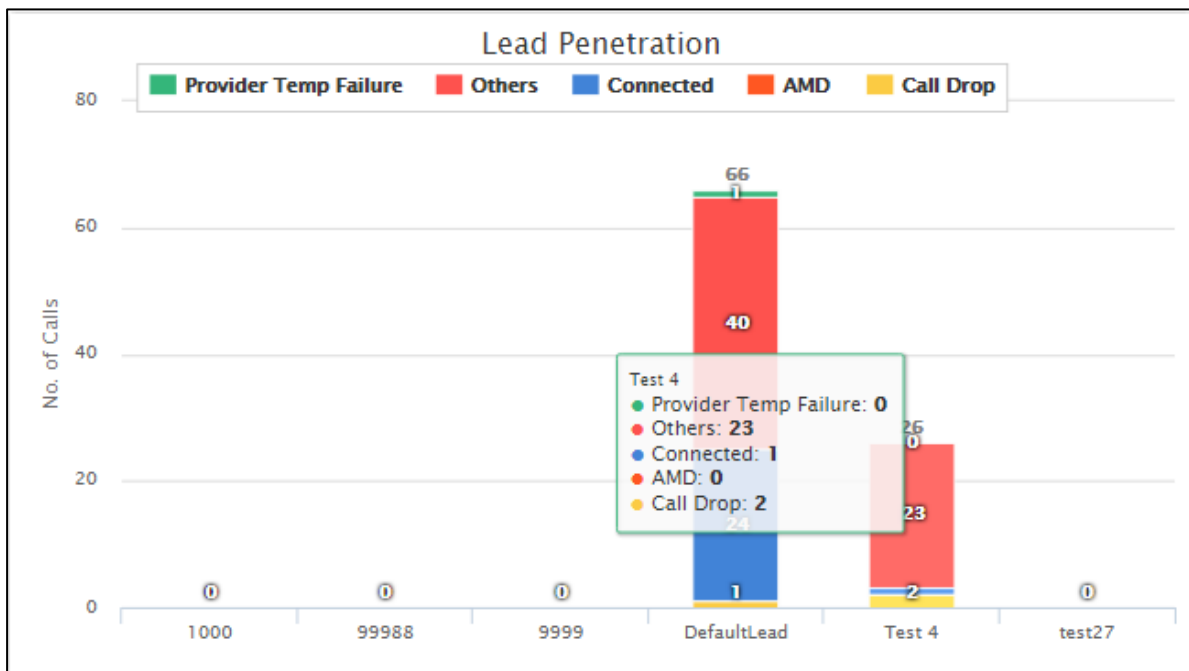


Figure: Lead Penetration

The Supervisor can view the following information here.

- **Lead Name:** It is the X-axis of the graph, which shows the lead name from which the numbers are dialed.
- **Count of Calls:** It is the Y-axis of the graph, which shows the count of different types of calls dialed from a particular lead.

On hovering the mouse cursor on the bars of a lead, the supervisor will be able to view the call count with respective call type.

4.4.2.5 Lead Performance

Supervisor can view the performance of the leads enabled in the selected campaign. Supervisor can view following details in the lead performance section for the selected time duration (15 mins, 30 mins, 1 hour, 1 day).

Lead Performance				
Name	Uploaded Contacts	Lead Penetration %	Connected	AMD
DefaultLead	56	117	24	0
Test 4	999	2	1	0
test27	999	0	0	0
9999	2191	0	0	0
1000	999	0	0	0
99988	999	0	0	0

Figure: Lead Performance

1. **Name:** It is the lead name which is enabled in the selected campaign.
2. **Uploaded Contacts:** It shows the count of numbers uploaded in that lead.
3. **Lead Penetration Percentage:** It shows the percentage of contacts that the dialer dialed from the respective lead.
4. **Connected:** It shows the number of calls on which call got connected, that is, number of calls disposed with "Connected" system disposition by Ameyo application.
5. **AMD:** It shows the number of calls disposed with "AMD" system disposition by Ameyo application.

4.4.2.6 Retry Attempt Analysis

This graph shows retry attempts.

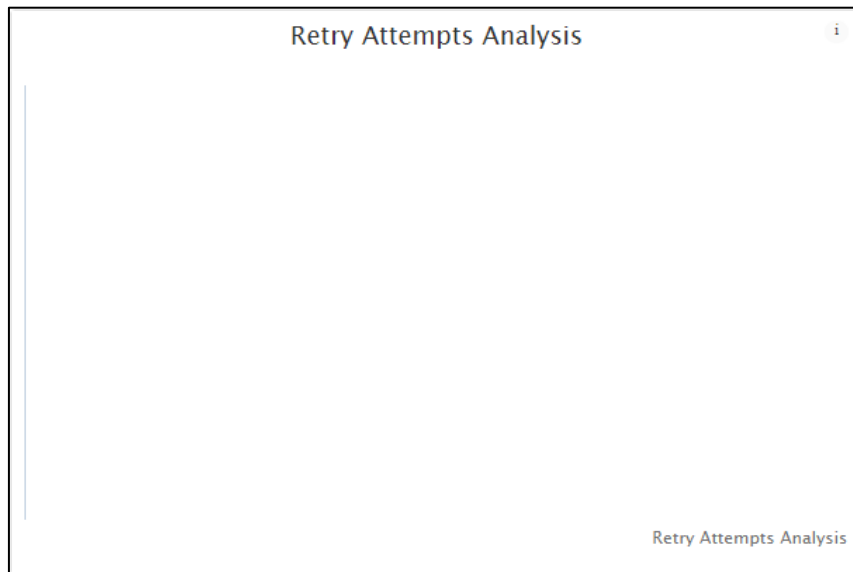


Figure: Retry Attempt

4.4.3 Lead Monitoring of Outbound Campaign

Through this tab supervisor can monitor various enabled leads and metrics which give him/her the understanding on lead performance.

Lead Name	Tried	Answered	AMD	Auto Dial	Manual Dial	Callback	Connects
DefaultLead	0	0	0	0	0	--	0
test	0	0	0	0	0	0	0

Figure: Lead Monitoring

Here, Supervisor can search for the desired lead using the provided search option.

4.5 Monitor Parallel Predictive Campaign

Here, Supervisor can monitor the Parallel Predictive Campaign.

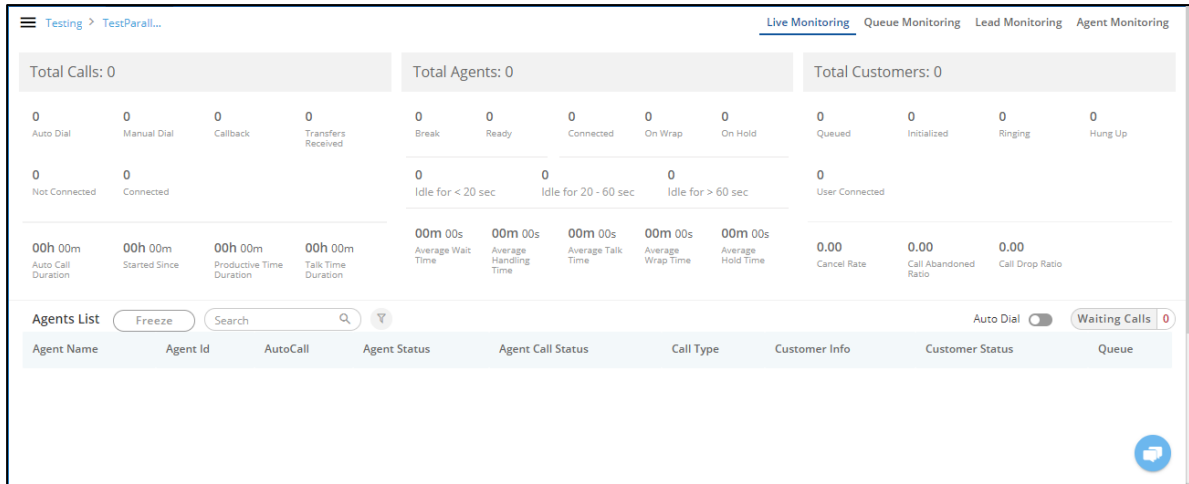


Figure: Monitor Parallel Predictive Campaign

It contains the following tabs.

- **Live Monitoring:** Perform the Live Monitoring in the campaign. This tab has already been discussed in the Inbound Campaign. [Know more...](#)
- **Queue Monitoring:** Monitor the queues in the campaign. This tab has already been discussed in Chat Campaign. [Know more...](#)
- **Lead Monitoring:** Monitor the leads in the Outbound Campaign. [Know more...](#)
- **Agent Monitoring:** Monitor the agents in the campaign. This tab has already been discussed in the Inbound Campaign. [Agent Monitoring](#)

4.6 Monitor Voice Blast Campaign

Here, Supervisor can monitor the Voice Blast Campaign.

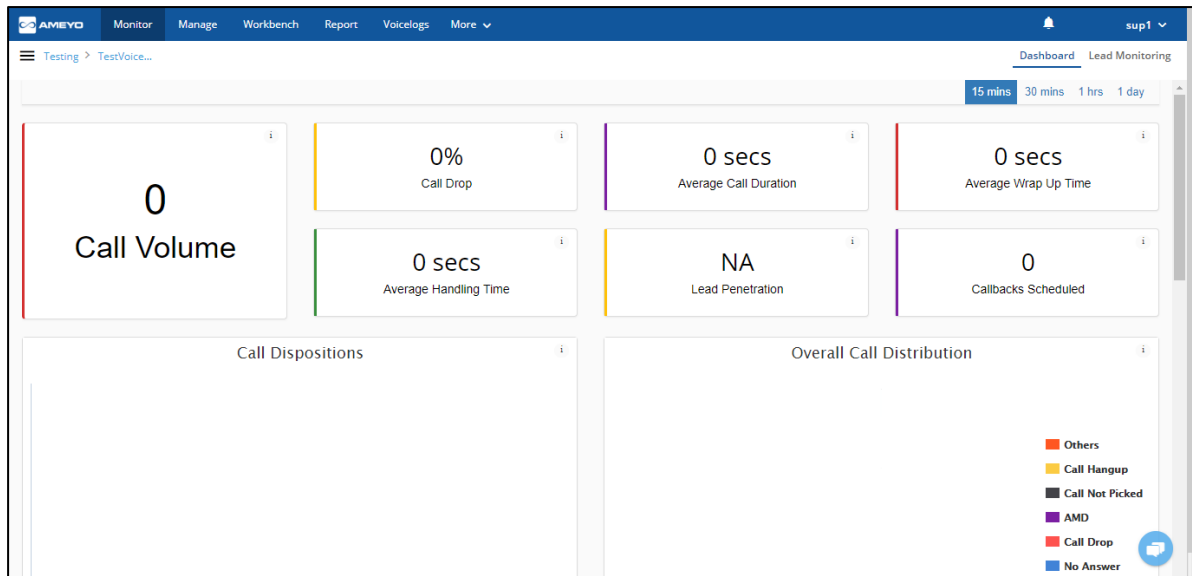


Figure: Monitor Voice Blast Campaign

It contains the following tabs.

- **Dashboard:** View the Dashboard of the campaign. This tab is similar to Dashboard of Outbound Campaign. [Know more...](#)
- **Lead Monitoring:** Monitor the leads in the campaign. This tab is similar to the Lead Monitoring in Outbound Campaign. [Know more...](#)

5. Manage Tab

Supervisor can manage the campaigns in which it has been assigned. The interface of this tab depends upon the type of campaign that you select in the left side navigation bar.

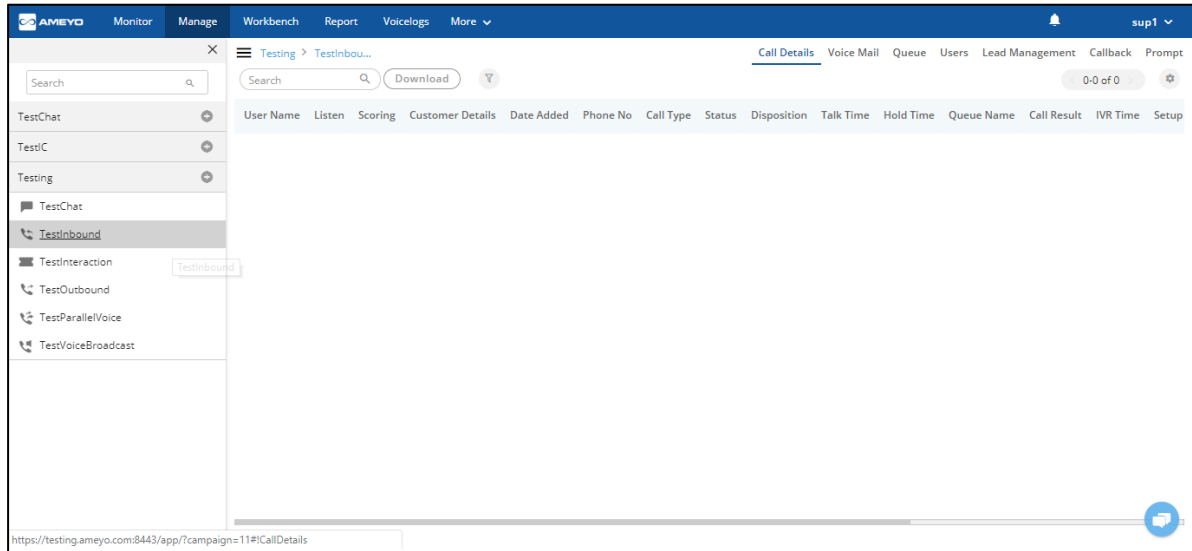



Figure: Manage Tab

Its interface can be divided into the following parts.

- **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 select any of the assigned processes and campaigns.
- **Tabs:** Different Tabs are visible on the top right corner for the different selected campaigns.

5.1 Manage Chat Campaign

Supervisor can manage the chat campaigns in which it has been assigned.

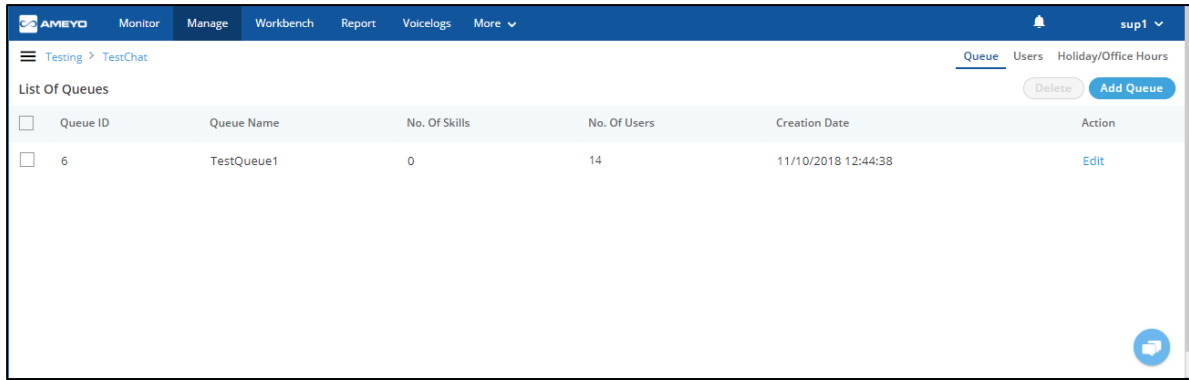


Figure: Manage Chat Campaign

It contains the following tabs.

- [Manage Queue in Chat Campaign](#)
- [Manage Users in Chat Campaign](#)
- [Manage Holiday/Office Hours in Chat Campaign](#)

5.1.1 Manage Queue in Chat Campaign

Queue is a group of agents to whom call can be routed through IVR. The agents assigned in the queues can only take the calls from respective IVR.

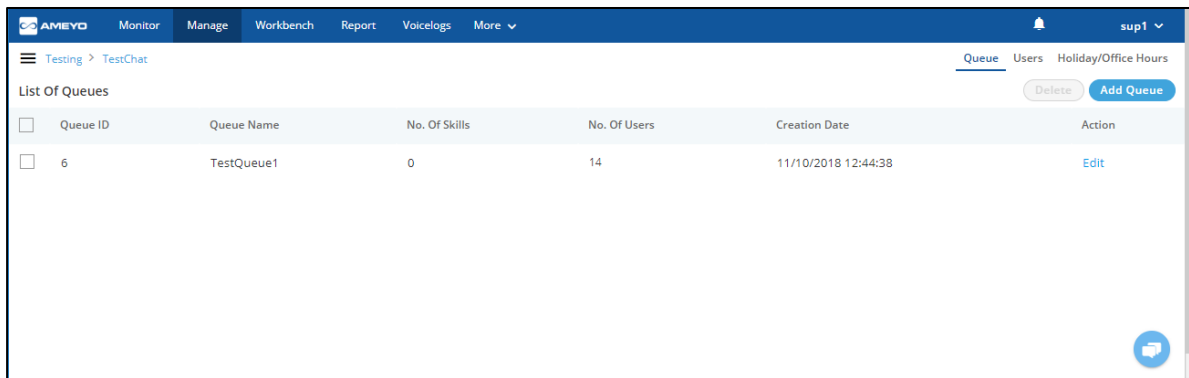


Figure: Manage Queue

You can perform the following operations here.

5.1.1.1 Create Queue


Perform the following steps to create a queue.

1. Click "Add Queue" button on the top right corner to add 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. If two customers (customer1 with priority 1 and customer2 with priority 2) are waiting in the queue and customer1 is the first to reach in queue, then customer2 who have higher priority will be connected to the agent first.

Other Example: The priority can be applied to the queue also. 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 agent will be connected to Customer2 first because of the higher priority of its Queue2.

5. **Resource Scheduler Type:** 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:** 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.

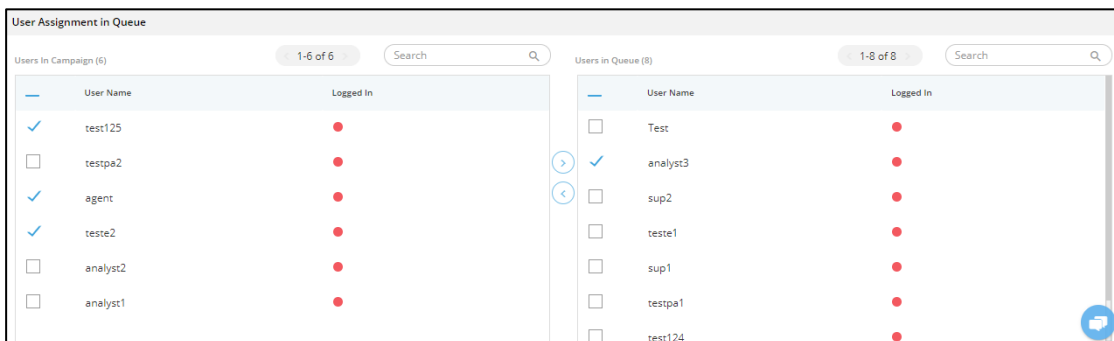


Figure: Options to Assign or Unassign Users in the Queue

9. Click "Save" 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 Skills	No. Of Users	Creation Date	Action
14	Test12	0	8	29/10/2018 20:28:28	Edit
6	TestQueue1	0	14	11/10/2018 12:44:38	Edit

Figure: List of Queues

You can select a queue and click "Edit" link to edit. To delete, select a queue and click "Delete" button.

5.1.2 Manage Users in a Campaign

Here, the Supervisor can manage the users in the selected campaign. It shows only those users, which are assigned in the parent Process of the selected campaign.

My Available Users (4)			Assigned Users (8)			
User ID	User Name		User ID	User Name	Manage Skills	
<input checked="" type="checkbox"/>	agent	agent	<input checked="" type="checkbox"/>	Test	Test1	Manage Skills
<input checked="" type="checkbox"/>	analyst1	analyst1	<input checked="" type="checkbox"/>	test123	Test123	Manage Skills
<input type="checkbox"/>	analyst2	analyst2	<input type="checkbox"/>	test124	test124	Manage Skills
<input type="checkbox"/>	analyst3	analyst3	<input type="checkbox"/>	test125	test125	Manage Skills
			<input type="checkbox"/>	teste1	teste1	Manage Skills
			<input type="checkbox"/>	teste2	teste2	Manage Skills
			<input type="checkbox"/>	testpa1	testpa1	Manage Skills
			<input type="checkbox"/>	testpa2	testpa2	Manage Skills

Figure: User Management

Supervisor can perform the following operations here.


5.1.2.1 Assign or Unassign Users in a Campaign

Supervisor can assign or assign the users in the campaign.

Perform the following steps here to assign or unassign the users.

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.
3. Click "Apply" to apply the settings.

To unassign the users, select the users in "Assigned "Users" section and click  icon. Click "Apply" to make the changes.

5.1.2.2 Manage Skills

Supervisor can manage the skills for the users who are assigned in the campaign.

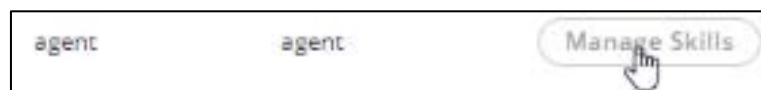


Figure: Manage Skill option

Perform the following steps.

1. Click "Manage Skills" button for any user in "Assigned User" section. It shows the following pop-up.

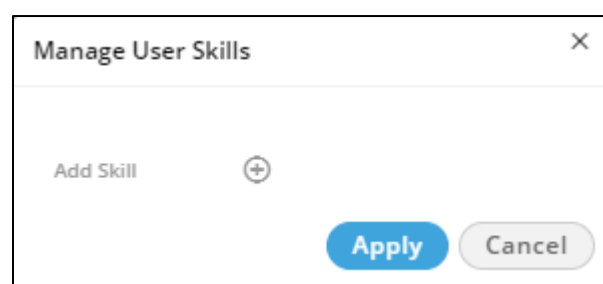


Figure: Manage Skill pop-up

2. Click "+" icon to add a skill. It shows the skills added by the Administrator in its Console.

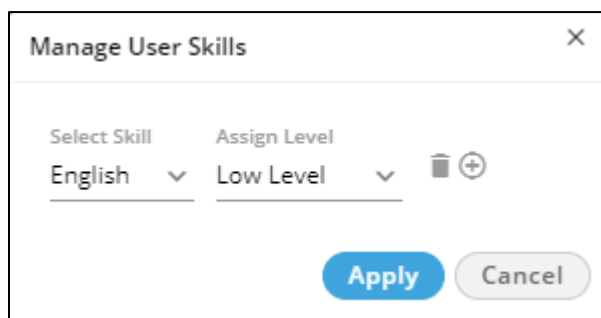



Figure: Manage Skills

3. Select a skill and then select its level.
4. You can click "+" icon to add more skills.
To delete a skill, click  icon.
5. Click "Apply" to apply the skill on the selected user.
Click "Cancel" to not apply the skills.
6. It takes you back to "Users" tab in Chat Campaign Management. Click "Apply" to apply the changes.
Click "Refresh" either to discard the changes or to refresh the page view.

5.1.3 Manage Holiday/Office Hours in a Campaign

Holiday/Office Hour Configuration at Queue-level in Supervisor Interface is available only for Chat Campaign, Interaction Campaign, and Inbound Campaign. It is not available for Outbound Campaign, Parallel Predictive Campaign, and Voice Blast Campaign.

This tab lets Supervisor configure the Holiday and Office Hour Configuration at queue-level, which will override the configuration defined by the Administrator at Campaign-level and System-level.

If Holiday/Office Hour Configuration is not available at queue-level, the campaign-level configuration will be used. Again if it is not available at campaign-level, the system level configuration will be used.

Figure: Edit Holiday/Office Hour Configuration

If no existing Holiday and Office Hour Configuration for a Queue exists, then it shows the unconfigured page, which does not contain any settings.

Here, the settings can be divided into the following two categories.

5.1.3.1.1 Working Hour Configuration

Perform the following step to configure the working hours.

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

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

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

The screenshot displays the 'Time Management' interface. It features a table with columns for 'Working Hours Day', 'Start Time', and 'End Time'. Each row represents a day of the week (Monday through Sunday). The 'Start Time' and 'End Time' columns contain input fields with a clock icon and the placeholder 'hh:mm:ss'. To the right of each row is an 'Add' button. A 'Refresh' button is located in the top right corner. A 'Choose Time' pop-up window is overlaid on the Tuesday 'Start Time' field, showing a 'Time' label and three dropdown menus for hours (00), minutes (00), and seconds (00), along with a 'Done' button.

Figure: Define Working Hours

3. Click "Add". You can provide the working hours for all seven days as displayed in the following screenshot.

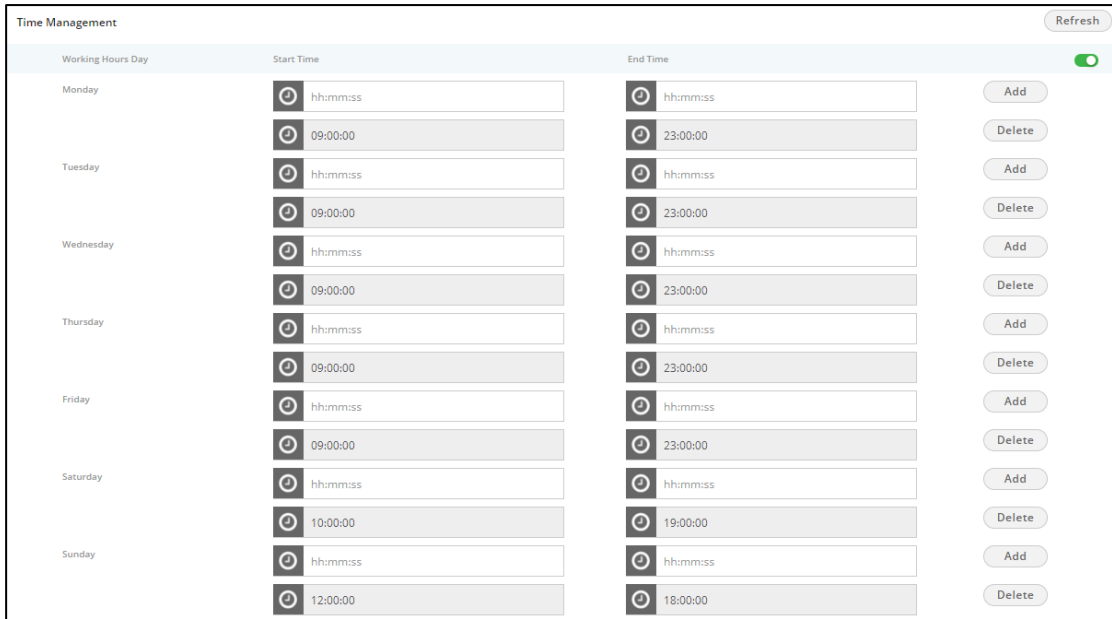


Figure: Defined Working Hours

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

5.1.3.1.2 Holiday Configuration

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

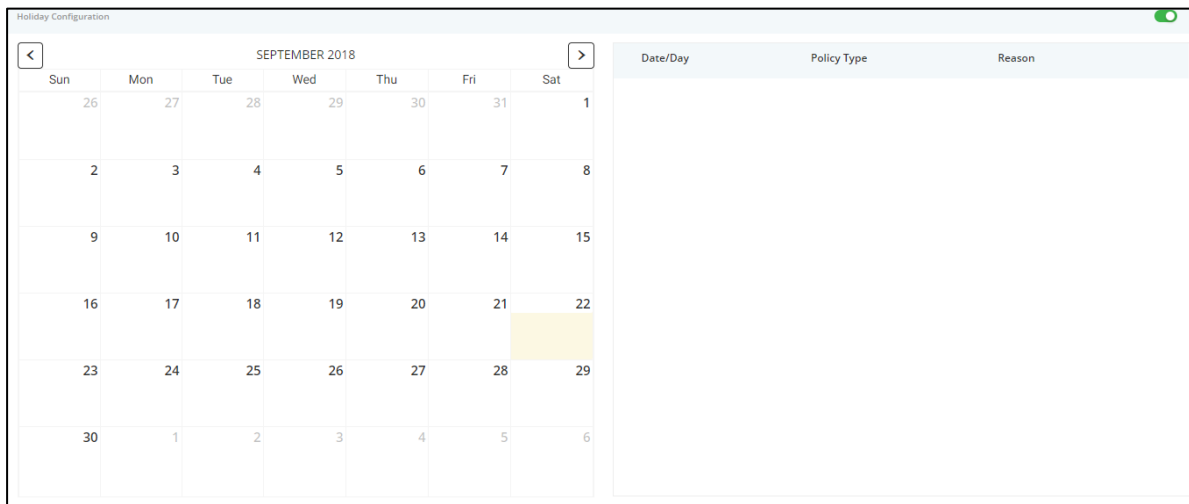


Figure: Holiday Configuration

Perform the following steps.

1. Administrator can select the date from calendar to mark different days as holiday.

- Click a day to mark that day as Holiday or Working Day using the following pop-up.

Figure: Create Holiday or Working Day

- 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.

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

Figure: Create Reoccurring Holidays

After selecting it, select any of the following options.

- All:** Select it to mark all days in the month as the holiday.

Holiday on an alternate day mean 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 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 in the right side section.

Following is a sample screenshot.

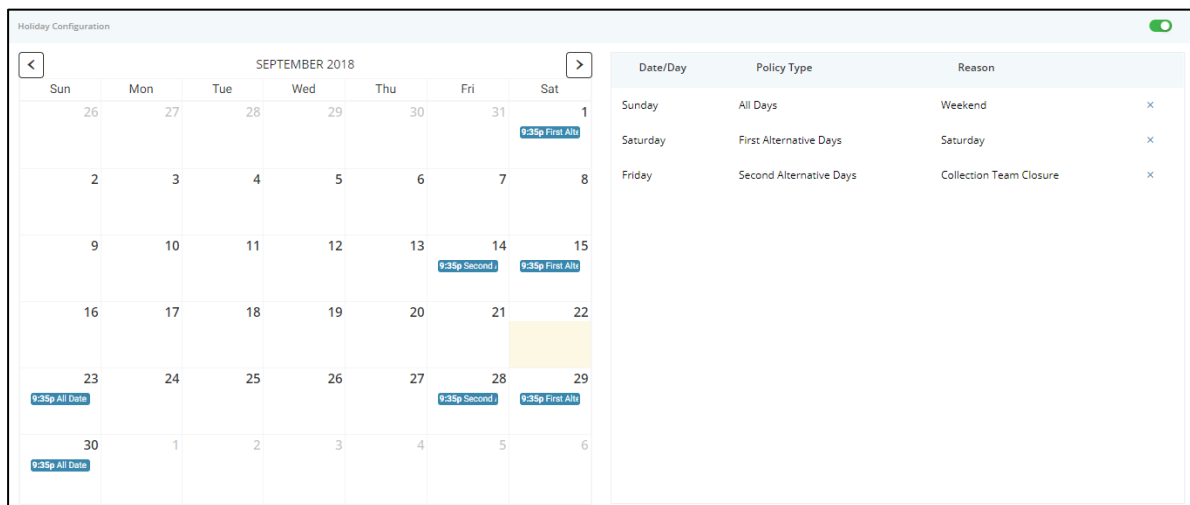


Figure:Created the holidays

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

Click "Back" after making the changes and the changes will be saved. Click "Refresh" to discard the changes.

5.1.3.2 Enable or Disable Office Hour Configuration

For any queue, click switch to enable the Office Hour Configuration.

To disable Office Hour Configuration, click switch.

5.1.3.3 Enable or Disable Holiday Configuration

For any queue, click switch to enable the Holiday Configuration.

To disable Holiday Configuration, click switch.

5.1.3.4 Copy to Queue

Hover the mouse over any queue to view the option "Copy to Queue". Click it to copy the Holiday and Office Configuration for any queue to another queue. Perform the following steps for it.

1. Click "Copy to Queue" to access the following pop-up.

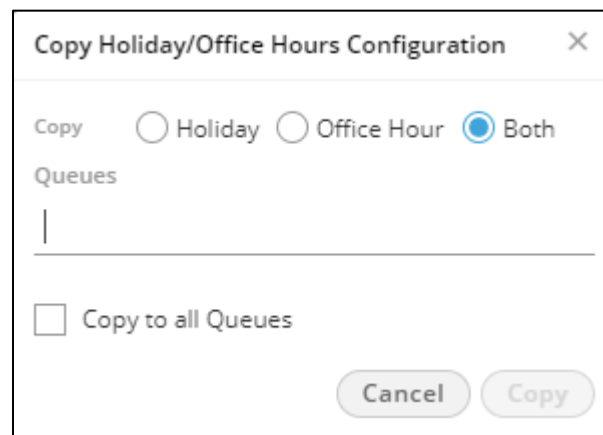


Figure: Copy Holiday Configuration to Queue

2. Select any of the following options whether you want to copy the Holiday Configuration or Office Configuration or both.
 - Holiday
 - Office Hour
 - Both
3. **Queue:** In this text field, click to enumerate the list of all queues in the campaign, which are managing right now.

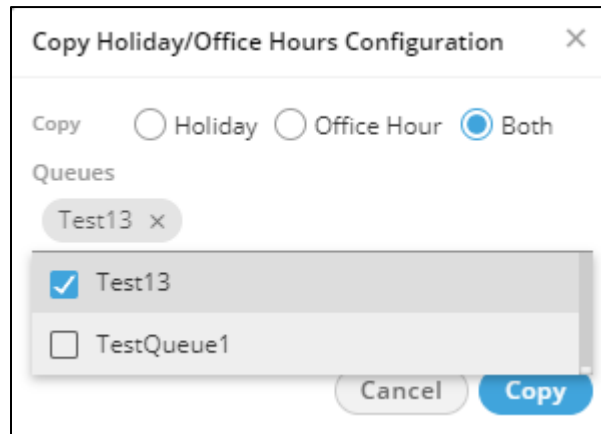


Figure: Queue Selection

Select the queues.

4. If you want to copy the Holiday Configuration or Office Hour Configuration or both to all queues, check "Copy to all Queues" box. **Else, keep it unchecked.**
5. Click "Copy" to copy the Holiday Configuration, Office Hour Configuration or both.

5.2 Manage Interaction Campaign

Supervisor can manage the Interaction campaigns in which it has been assigned.

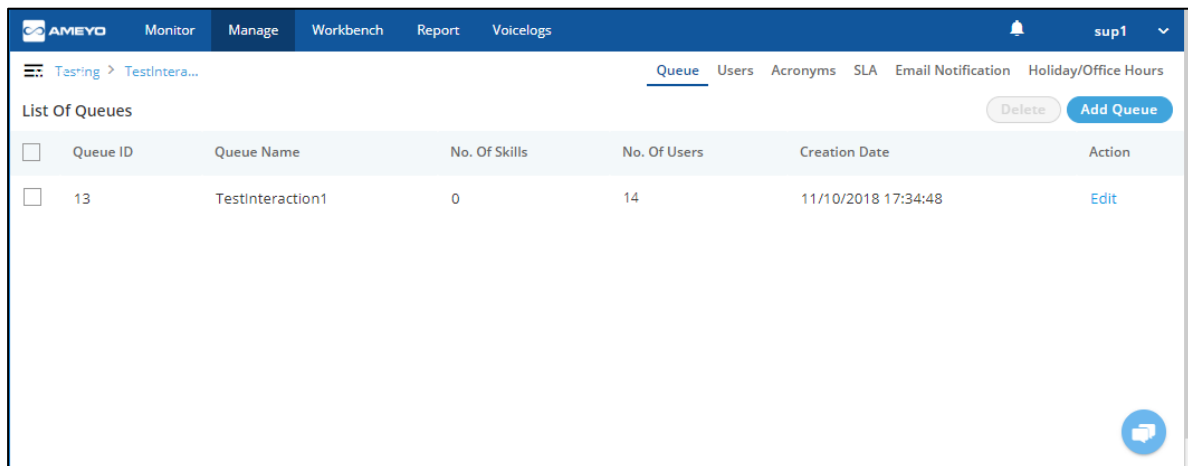


Figure: Manage Interaction Campaign

It contains the following tabs.

- **Queue:** Here, the Supervisor can add, edit, and delete the queues in the Interaction Campaign. This tab has already been discussed in Chat Campaign. [Know more...](#)

- **Users:** Here, the Supervisor can assign or unassign the users in this campaign. The Supervisor can also manage the skills of the users. This tab has already been discussed in Chat Campaign. [Know more...](#)
- **Acronyms:** Here, the Supervisor can create and manage the acronyms in this campaign. [Know more...](#)
- **SLA:** Here, the Supervisor can define the SLA (Service Level Agreement)-based Ticket Assign Time, First Response Time and Resolve Time. [Know more...](#)
- **Email Notifications:** Here, the Supervisor can manage the email notifications. [Know more...](#)
- **Holiday/Office Hour Configuration:** Here, the Supervisor can configure the Holiday Configuration and Office Hour Configuration for the campaign. This tab has already been discussed in Chat Campaign. [Know more...](#)

5.2.1 Manage Acronyms in Interaction Campaign

An acronym is an abbreviation formed from the initial letters of other words and pronounced as a word. For example, ASCII, NASA, and IIT.

In Acronyms Tab, the Supervisor can create, edit, and delete the acronyms. Whenever a stored Acronym is typed by the Agent (followed by a Space), Supervisor or other User, in the Email for the same Interaction Campaign, the acronym will be replaced with the provided Full Form.

Figure: Manage Acronyms

Here, Supervisor can perform the following operations.

5.2.1.1 Create Acronym

Perform the following operations to create an acronym.

1. Click "Create New Acronym" button. It shows the following pop-up.

Figure: Create New Acronym

2. Enter the short term and its full term.
3. Click "Save" to create a new acronym.

You can create multiple acronyms.

	Short Term	Full Term	
<input type="checkbox"/>	ASCII	American Standard Code for Information Interchange	🗑️
<input type="checkbox"/>	BARC	Bhabha Atomic Research Centre	🗑️
<input type="checkbox"/>	DRDO	Defence Research and Development Organisation	🗑️
<input type="checkbox"/>	IIT	Indian Institute of Technology	🗑️
<input checked="" type="checkbox"/>	ISRO	Indian Space Research Organisation	🗑️
<input type="checkbox"/>	NASA	National Aeronautics and Space Administration	🗑️

Figure: List of Acronyms

5.2.1.2 Edit an Acronym

When you select an acronym, its details are displayed on the left side. You can modify these details to edit the acronym.

5.2.1.3 Delete an Acronym

Select an acronym and click 🗑️ icon to delete it.

5.2.2 Manage SLA in Interaction Campaign

SLA stands for Service Level Agreement, which is a commitment between a service provider and a client. Particular aspects of the service – quality, availability, responsibilities – are agreed between the service provider and the service user.

5.2.2.1 SLA Metrics

In Contact Center environment, common SLA time metrics are listed hereinbelow.

- **Assign Time:** It defines the time duration in which the ticket will be assigned to any agent.
- **First Response Time:** It defines the time duration in which first response to the customer upon the ticket will be given.
- **Resolve Time:** It defines the time duration in which the ticket will be resolved.

"SLA" Tab in "Manage" → "Interaction Campaign" lets Supervisor configure them.

Priority	Assign time	First Response Time	Resolve Time
High	00 Min(s) ↓	00 Min(s) ↓	00 Min(s) ↓
Medium	00 Min(s) ↓	00 Min(s) ↓	00 Min(s) ↓
Low	00 Min(s) ↓	00 Min(s) ↓	00 Min(s) ↓

SLA Escalation Configuration

Mail Sender Id: Ex.example@gmail.com Mail Sender Password: _____ Mail Receiver Id: Ex.example@gmail.com Properties: Ex.example@gmail.com

Figure: Manage SLA

5.2.2.2 SLA Calculation Equation

Expected SLA breach time is calculated as per the following equation.

Creation Time (when the ticket was created) + **Pending Duration** (how much time is required to close the ticket) + **Configured SLA Duration** (in how much time SLA should be achieved)

All variables are defined as per the Office Hours.

5.2.2.3 Factors Affecting SLA Calculation

SLA Calculation depends upon the ticket priority and the level upon which the SLA is enabled for any of the SLA Time Metrics. If SLA is enabled at queue-level, then it will have more priority over the campaign-level and system-level SLA configuration. Similarly, Campaign-level SLA Configuration has more priority over System-level SLA Configuration.

5.2.2.4 When SLA is Calculated?

SLA is calculated only once when the ticket is created. **SLA is not calculated for those tickets which are in "PENDING" internal state or any external state created under "PENDING".**

SLA will not be calculated for the existing tickets (created before changing , even if SLA Configuration for any metric or Holiday Configuration or Office Hour Configuration is changed, until their state, priority, or queue is changed.

If duration of any SLA time metric is stretched between two days having different working hours, SLA will be calculated as per the changing working hours.

5.2.2.4.1 Example

Suppose Supervisor has provided following values for the different time metrics.

Assign Time SLA: 1 hour

First Response Time SLA: 2 hour

Resolve Time SLA: 15 hour

Following is the details of three days.

Day	Status	Working Hours
Day 1	Working	9 AM to 10 PM
Day 2	Not Working (Holiday)	--
Day 3	Working	11 AM to 11 PM

Suppose an agent has opened a ticket at 5 PM on Day 1. Then, following will be the expected SLA breach timings for this ticket.

Assign Time SLA will breach within 1 hour at = 6 PM on Day 1

First Response Time will breach within 2 hour at = 7 PM on Day 1

Resolve Time SLA will breach within 15 hours at = 9 PM on Day 3

Suppose after creating the ticket, Supervisor has changed "Resolve Time SLA" to 10 hour. Now, "Resolve Time SLA" has to be breached on 4 PM, but it will not be changed for this ticket until its priority, state, or queue is changed.

5.2.2.5 Configure SLA Time Metrics

Perform the following steps to configure the SLA Time Metrics.

1. If you want to configure the SLA Time Metrics for the entire campaign, keep "Enable Queue Level SLA" unchecked.
2. For any time metric, you can configure the provide any time duration in minutes, hours, days, and months.

The days and month are defined as the Holiday and Office Hour Configuration defined at queue level. If it is not available at queue-level, the campaign-level Holiday/Office Hour Configuration is used. Again if it is not available at campaign-level, the system level Holiday and Office Hour Configuration is used.

Supervisor can configure the queue-level Holiday and Office Hour Configuration, whereas the Administrator can do it at the Campaign-level and System-level.

Priority	Assign time	
High	10	Min(s)
Medium	00	Hour(s)
Low	00	Day(s)
		Month(s)

Figure: Time Options

3. You can modify the timing options for all time metrics for all priorities.

<input type="checkbox"/> Enable Queue Level SLA	Priority	Assign time	First Response Time	Resolve Time
TestInteraction	High	10 Min(s) ▾	45 Min(s) ▾	1 Day(s) ▾
	Medium	15 Min(s) ▾	2 Hour(s) ▾	2 Day(s) ▾
	Low	30 Min(s) ▾	3 Hour(s) ▾	3 Day(s) ▾
				Reset Submit

Figure: Configured SLA Time Metrics for the entire Campaign

5.2.2.6 Configure SLA Time Metrics for Queue-level

If you want to configure the SLA Time Metrics separately for each queue in the campaign, check "Enable Queue Level SLA". It will list the queues under the campaign in the left side.

<input checked="" type="checkbox"/> Enable Queue Level SLA	Priority	Assign time	First Response Time	Resolve Time
TestInteraction	High	00 Min(s) ▾	00 Min(s) ▾	00 Min(s) ▾
Search <input type="text"/>	Medium	00 Min(s) ▾	00 Min(s) ▾	00 Min(s) ▾
TestInteraction1	Low	00 Min(s) ▾	00 Min(s) ▾	00 Min(s) ▾
TestInteraction2				
				Reset Submit

Figure: Queue-level SLA Configuration

Supervisor can click the Campaign or the queue to access the SLA Time Metrics. The Supervisor can perform the above-listed steps to configure the SLA Time Metrics separately for each queue.

The Queue-level SLA Configuration will override the configuration done at campaign-level. If queue-level SLA configuration is not available, the campaign-level configuration will be used in the queue.

5.2.2.7 SLA Escalation Configuration

Here, Supervisor can configure the settings for sending notification to a recipient, who will handle the escalations whenever any SLA time metric is breached for any ticket.

SLA Escalation Configuration

Mail Sender Id mailsender@domain.com	Mail Sender Password *****	Mail Receiver Id supervisor1@domain.com	Properties SLA
---	-------------------------------	--	-------------------

Cancel
Save

Figure: SLA Escalation Configuration

Here, the Supervisor has to provide the following inputs.

- **Mail Sender ID:** Provide the email address of the sender of the email.
- **Mail Sender Password:** Provide the password of the provided sender's email address.
- **Mail Receiver ID:** Provide the email address of the receiver, who will handle the SLA breaches.
- **Properties:** You have to enter the following script that will let the system send email.

```
"1": {"mailSender": "<sender_email_ID>", "mailSenderPassword": "<sender_email_pwd>", "mailReceiver": "<receiver_email_ID>", "host": "<sender_email_smtp_server>", "port": "<sender_email_smtp_port_number>", "loginRequired": "<true_false>", "mailServerprops": {"mail.smtp.socketFactory.class": "javax.net.ssl.SSLSocketFactory", "mail.smtp.port": "<sender_mail_smtp_port_number>", "mail.smtp.host": "<sender_smtp_address>", "mail.smtp.starttls.enable": "<enable_ssl_true_false>", "mail.smtp.auth": "<enable_auth_true_false>", "mail.smtp.ssl.checkserveridentity": "<identity_true_false>", "mail.smtp.ssl.trust": "*"}}
```

Replace the following parameters.

Parameter	Required Value
<sender_email_ID>	Email ID of Sender
<sender_email_pwd>	Password of the Sender's Email Address.
<receiver_email_ID>	Recipient Email Address
<sender_smtp_server>	SMTP Server of the Sender's Email Address

<sender_mail_smtp_port_number>	Port Number of the SMTP Server.
<enable_ssl_true_false>	Enter "True" if your SMTP Server needs SSL or TLS security.
<enable_auth_true_false>	Enter "True" if your SMTP Server requires authentication.
<identity_true_false>	Enter "True" if your SMTP Server requires Identity Authentication.

5.2.3 Manage Email Notifications in Interaction Campaign

Here, Supervisor can configure the Email Notifications that will be delivered to the customers.

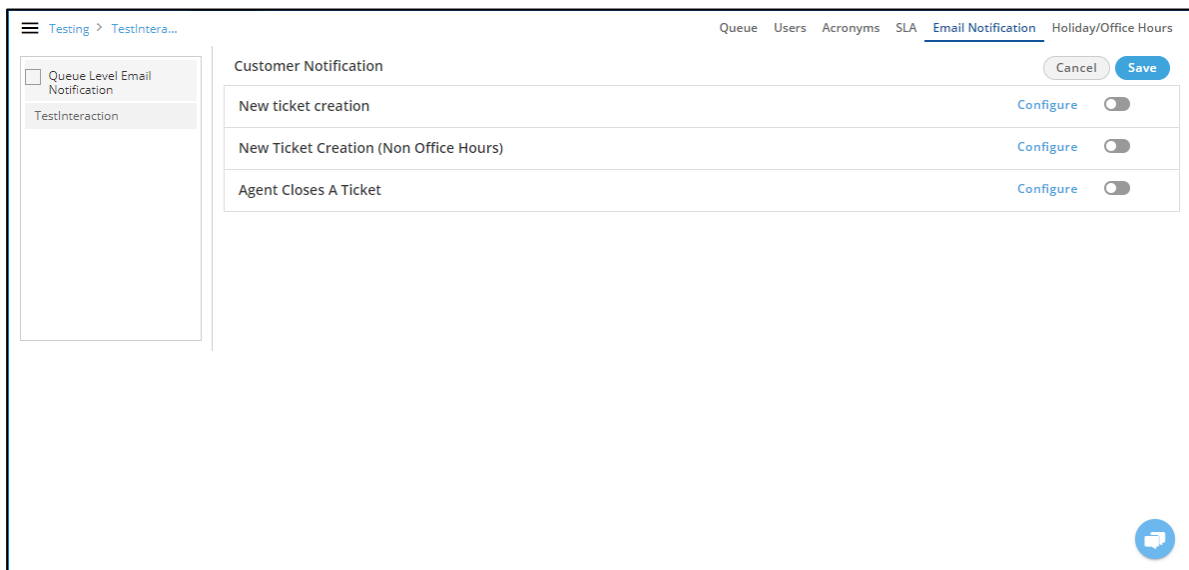


Figure: Manage Email Notifications

Supervisor can configure the email notifications for the following events.

- New Ticket Creation
- New Ticket Creation (Non Office Hours)
- Agent Closes a Ticket

Supervisor can perform the following operations here.

5.2.3.1 Configure Email Notification for an Event

Perform the following steps to configure the "Email Notification" for any event.

1. Click the row or "Configure" link for any event. A section slides down that contains the email fields.

Figure: Configure Email

2. Select the media profile, specifically email media profile, from which you want to send the email.
3. Select the alternate media profile, again an email media profile, which will be used to send the email if it could not be sent from the primary one.
4. You can type the message in the text area and use the provided tools to format the text, insert the image, and insert any hyperlink.
5. Click "Insert Placeholders" button to access the placeholders in the following pop-up.

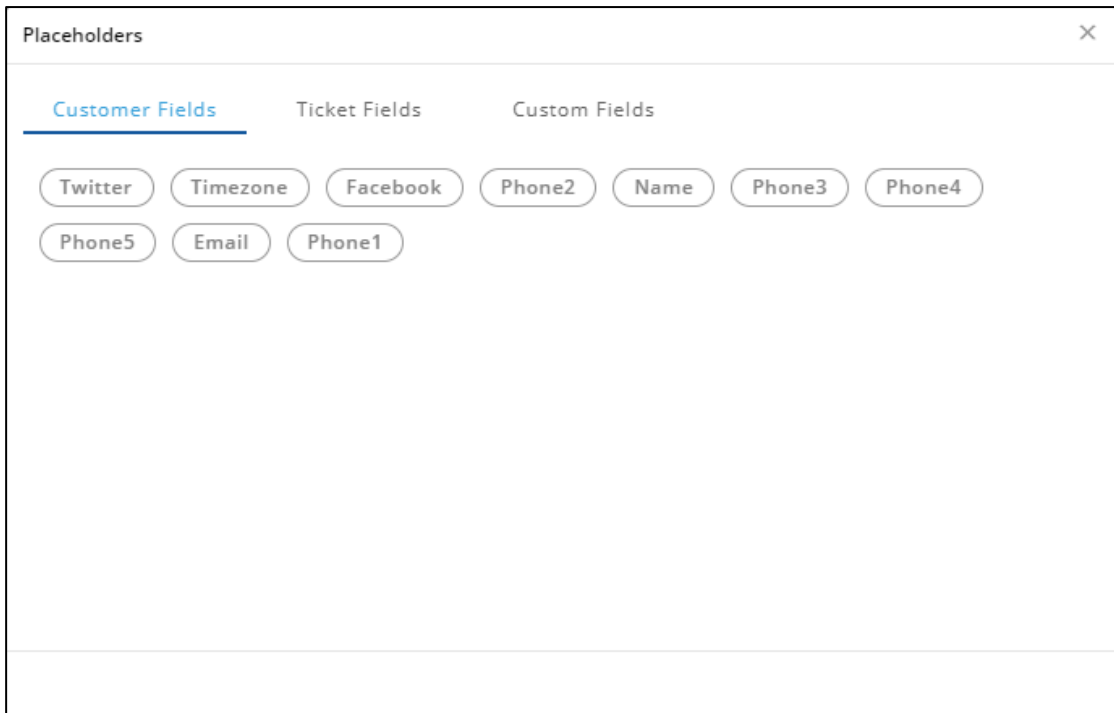


Figure: Placeholders

It contains the following placeholders.

- **Customer Fields:** Use this tab to insert the following customer-related placeholders.
 - Twitter
 - Timezone
 - Facebook
 - Phone1
 - Phone2
 - Phone3
 - Phone4
 - Phone5
 - Name
 - Email
- **Ticket Fields:** Use this tab to insert the following ticket-related placeholders.
 - Ticket ID


- Subject
 - Internal State
 - External State
 - Priority
 - Assigned User ID
 - Queue Name
 - Campaign Name
 - First Response SLA
 - First Assigned SLA
 - Resolution SLA
 - Recent Public Note
 - Creation Date
 - Modified Date
 - Resolve Date
 - Transfer Reason
 - Time to First Assign SLA Breach
 - Time to First Response SLA Breach
 - Time to Resolve SLA Breach
- **Custom Fields:** Custom Fields are those which are defined by the Administrator at the Process-level (in "Process Settings") in its Administrator Console.

Click the required placeholder to place it in the email.

6. Click "Save" to save the email configuration.

5.2.3.2 Enable or Disable Email Notification Configuration

Click  switch to enable the Email Notification for any event.

To disable the Email Notification for any event, click  switch.

5.2.3.3 Queue-level Email Notification Configuration

If you want to configure the Email Notifications separately for each queue in the campaign, check "Enable Queue Level Email Notification". It will list the queues under the campaign in the left side.

Customer Notification		Cancel	Save
New ticket creation	Edit	<input type="checkbox"/>	
New Ticket Creation (Non Office Hours)	Edit	<input type="checkbox"/>	
Agent Closes A Ticket	Edit	<input type="checkbox"/>	

Figure: Queue-level Email Notification Configuration

Supervisor can click the Campaign or the queue to access the Email Notifications for the campaign or the queue. The Supervisor can perform the above-listed steps to configure the Email Notifications separately for each queue.

The Queue-level Email Notifications Configuration will override the configuration done at campaign-level. If queue-level configuration is not available, the campaign-level configuration will be used in the queue.

5.3 Manage Inbound Campaign

The Supervisor can manage the inbound campaigns in which it has been assigned.

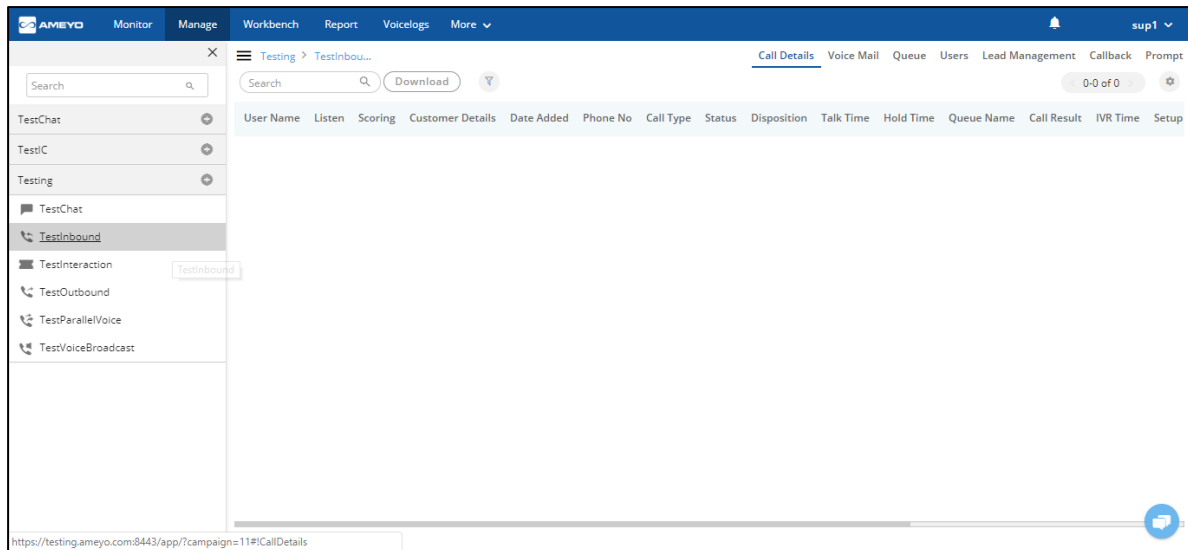


Figure: Manage Inbound Campaign

It contains the following tabs.

- **Call Details:** Here, the Supervisor can view the call details. [Know more...](#)
- **Voice Mail:** Here, the Supervisor can access the Voice Mails left by the customers when the customer was not attended because of any reason. [Know more...](#)
- **Queue:** Here, the Supervisor can add, edit, and delete the queues in the Interaction Campaign. This tab has already been discussed in Chat Campaign. [Know more...](#)
- **Users:** Here, the Supervisor can assign or unassign the users in this campaign. The Supervisor can also manage the skills of the users. [Know more...](#)
- **Lead Management:** Here, the Supervisor can enable or disable the lead, map a lead to any queue, and view the lead summary. [Know more...](#)
- **Callback:** Here, the Supervisor can add and manage the callbacks. [Know more...](#)
- **Prompt:** Here, the Supervisor can manage the Prompts. [Know more...](#)

5.3.1 Call Details

"Call Details" tab shows call details or history of last 200 calls in rolling basis and along with that an advanced section where call logs can be fetched with filters like date range, call duration, users, leads, customer status, call types. Fetched logs can be individually listened, recordings can be downloaded and whole call data can be extracted to CSV.

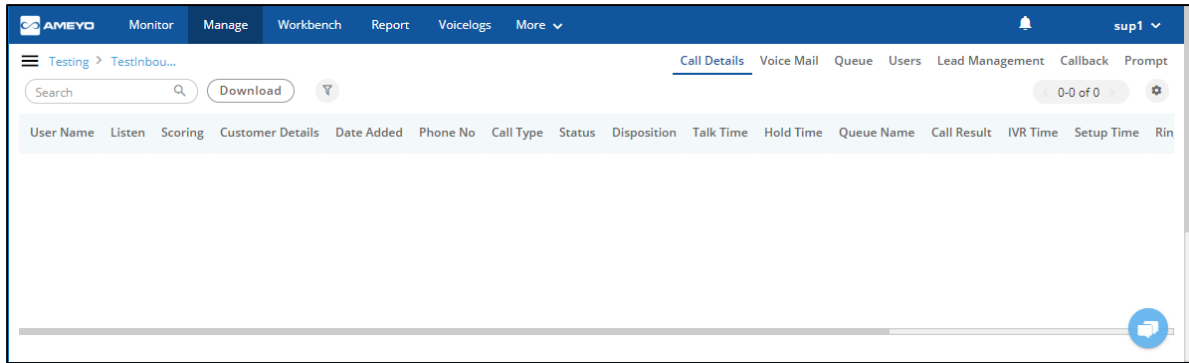


Figure: Manage Inbound Campaign

Supervisor can perform the following operations here.

5.3.1.1 Voice Log Search

Supervisor can use the search bar to search for any voice log.

Click "Download" button for the selected (searched) voicelogs to download it as a file on the disk.

5.3.1.2 Filters

Supervisor can click  icon to filter the call details.

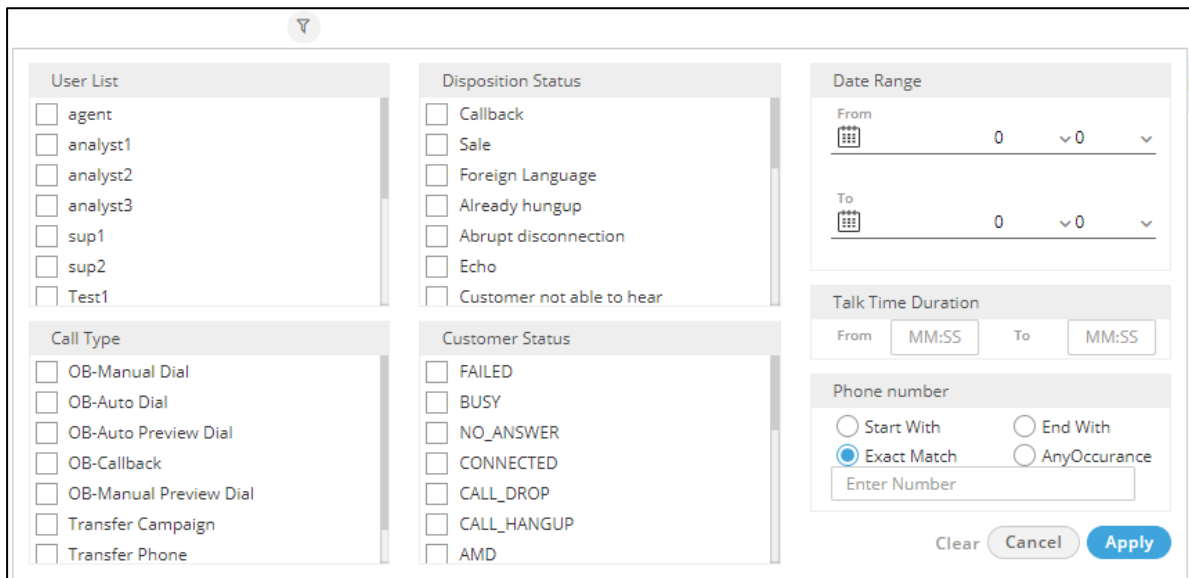




Figure: Filter Call Details

It contains the following filters.

1. **User List:** Supervisor can select the users for whom the supervisor wants to fetch the call details.
2. **Disposition Status:** Supervisor can also filter out the call details on the basis of disposition status, that is, No Voice, Echo, Sale, and others.
3. **Date Range:** Supervisor can also filter out the data on the basis of date range, that is, the supervisor can select the date by entering the range in **From** and **To** respective text boxes.
4. **Talk Time Duration:** Supervisor can filter out the data by selecting the specific call time duration. For example, if it wants to fetch the incoming and outgoing calls in which call time duration was between 40 to 60 minutes, then the supervisor can enter the range in the respective text boxes.
5. **Call Type:** Supervisor can also filter out the data in terms of type of call, that is, whether it was OB Manual dial, OB Auto Dial, Transfer to phone etc.
6. **Customer Status:** Supervisor can filter the data on the basis of status of call, that is, whether it was connected, failed, call drop etc.
7. **Phone Number:** Supervisor can also filter the data in terms of following phone number patterns.
 - A. **Start With:** Enter the initial digits of phone numbers to filter out the records, for example, 1234, 3456, and others.
 - B. **End With:** Enter the last digits of phone number to filter out the records, for example, 4343, 6344 etc.
 - C. **Exact Match:** Enter the phone number digits to filter out the records, for example, 1234, 3456, and others.
 - D. **Any Occurrence:** Enter few digits to filter out the records, for example, 34,87, and others.

The filter can be cleared any time by clicking "Clear" button. Click "Apply" to apply the filter, whereas you can click "Cancel" to not apply it.

5.3.1.3 Listen to Voicelogs

Supervisor can listen to the voice logs by clicking on  icon, the supervisor can listen to the connected call and a pop-up will appear using which user can download, increase/decrease volume along with other features like forward/reverse, mute/unmute, pause/un-pause the call. For not connected calls, "the listen button" remains disabled .

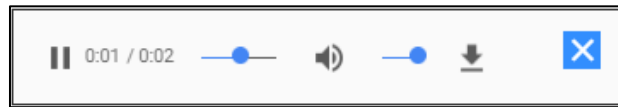


Figure: Play Voicelog

5.3.2 Voicemail

In Inbound Campaign, Voicemail are those Voice Messages which are left by the Customers when they were not connected to the agents because of any reason. "Voicemail" Tab lets the Supervisor fetch and listen these Voicemails as per user, queue, or campaign.

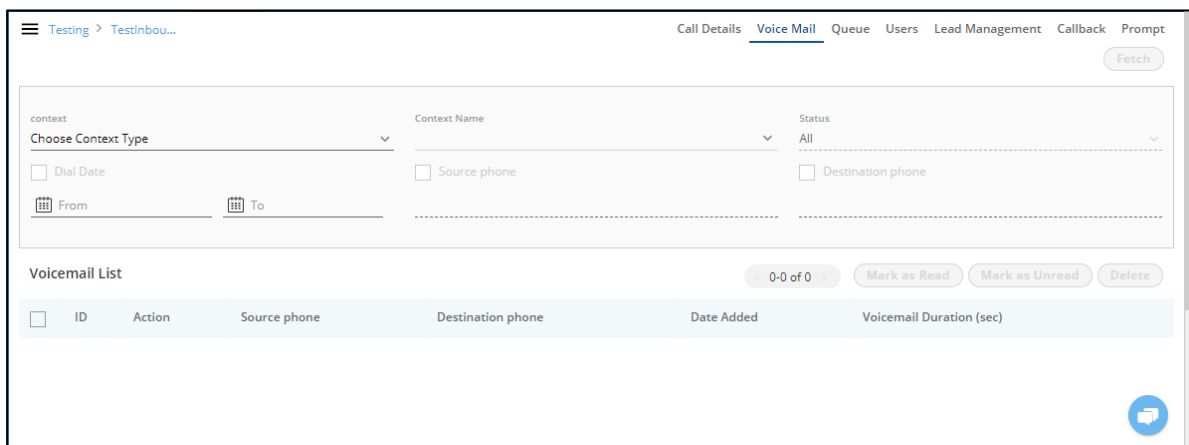


Figure: Voicemail

Perform the following steps to fetch the voicemails.

1. In "Context" drop-down menu select any of the following values. "Context Name" drop-down menu populates the values as per the value selected in "Context" drop-down.

- A. **User:** Select it to fetch the voicemails related to a selected user. After selecting it, "Context Name" drop-down menu lists all users assigned to the campaign. Select the required user.

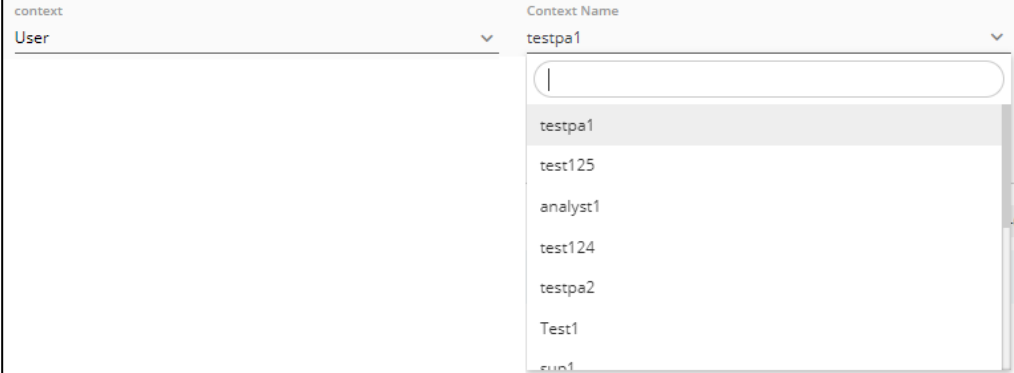


Figure: Select User

- B. **Queue:** Select it to fetch the voicemails for a queue. After selecting it, "Context Name" drop-down menu lists all queues of this campaign. Select the required queue.

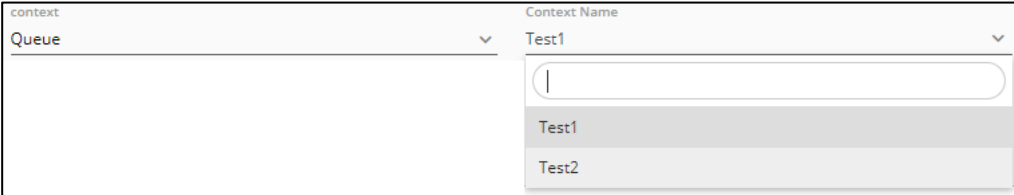


Figure: Select Queue

- C. **Campaign:** Select it to fetch the voicemails for this campaign. After selecting it, "Context Name" drop-down menu lists the name of current campaign only.

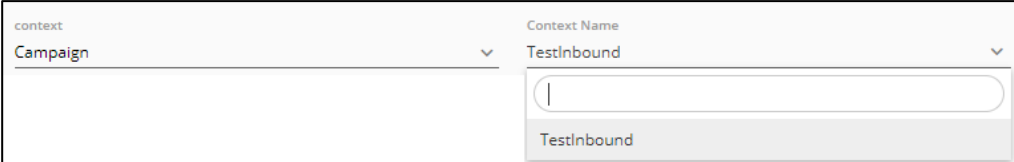


Figure: Selected Campaign

2. In "Status" drop-down menu, select any of the following options.

- A. **All:** Select it to fetch all voicemails whether they have been read or unread.

- B. **Read:** Select it to fetch only read voicemails.
 - C. **Unread:** Select it to fetch only unread voicemails.
3. **Dial Date (Optional):** Select it to fetch the voicemails recorded in the system between the duration of provided "From" and "To" dates. After selecting it, perform the following steps.
- A. Click "From" text field and select a date from the calendar.

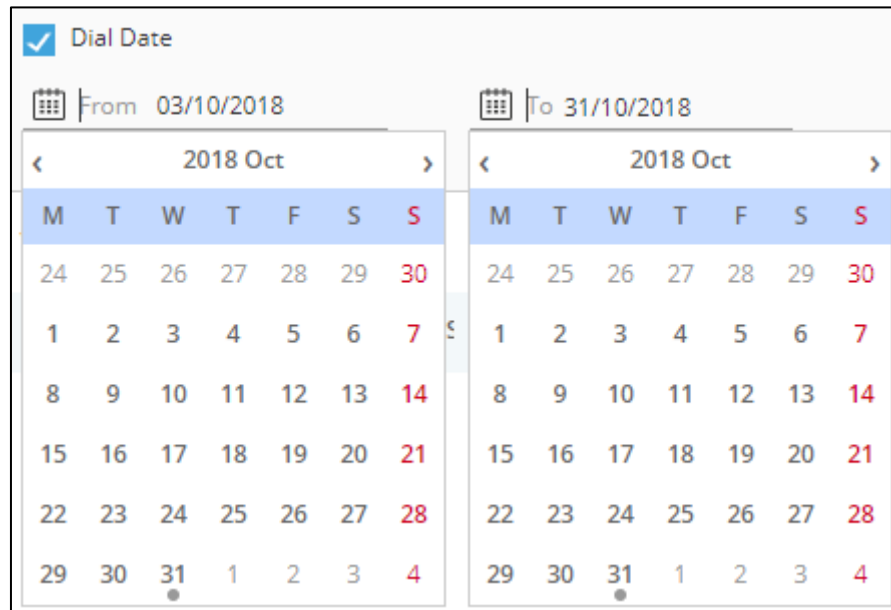


Figure: Select "From" and "To" Dates

- B. Click "To" text field and select a date from the calendar.
4. **Source Phone (Optional):** Select it to fetch the voicemails generated from the provided source phone number only.
 5. **Destination Phone (Optional):** Select it to fetch the voicemails at the provided destination phone number only.
 6. Click "Fetch" button to fetch the voicemails.

Supervisor can mark the voicemails as read and unread. Supervisor can also delete the voicemails.

5.3.3 Lead Management in Inbound Campaign

It contains only "Manage Leads" tab. Here, the Supervisor can see all leads (ID and Name), which are already created in the Process Settings.

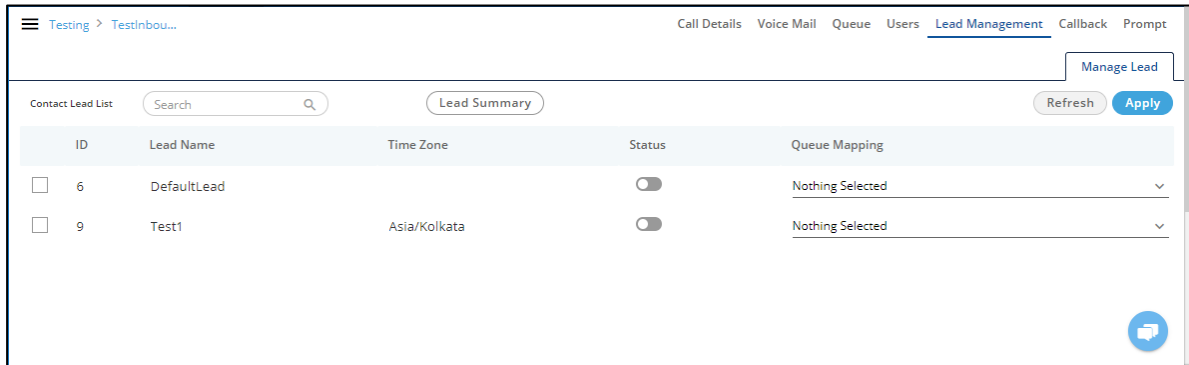


Figure: Lead Management in Inbound Campaign

Here, Supervisor can perform the following operations.

5.3.3.1 Map Lead to any Queue

For any lead, select a queue and click "Apply".

5.3.3.2 Enable or Disable the Lead

Click switch to enable the lead.

Click switch to disable the lead.

5.3.3.3 View Lead Summary

Select the leads and click "Lead Summary" to view and download the lead summary. It shows the following pop-up.

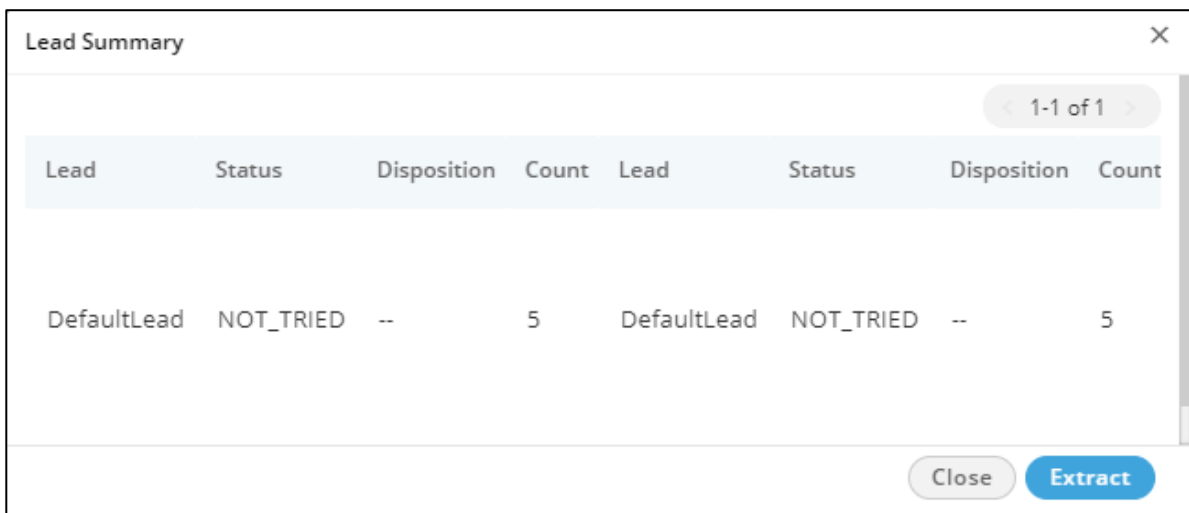


Figure: Lead Summary

Click "Extract" in this pop-up to save the Lead Summary as a CSV file on the disk. It shows the following dialog box.

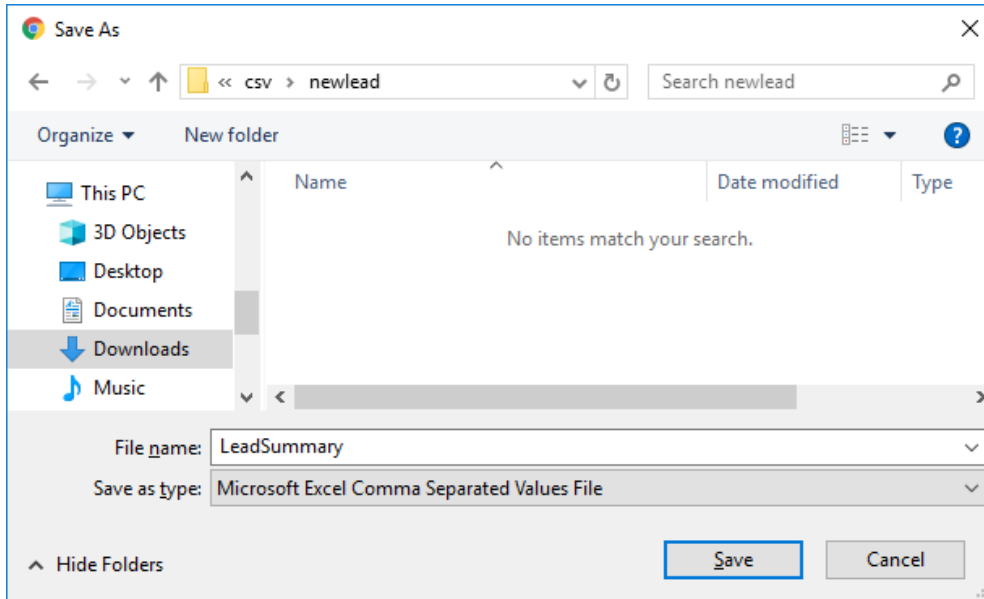


Figure: Lead Extraction

Select the location and provide a name to the file. Click "Save" to save the lead summary as the file.

5.3.4 Callback Management in a Campaign

Here, Supervisor can add a callback, view the callbacks with filters, and manage them.

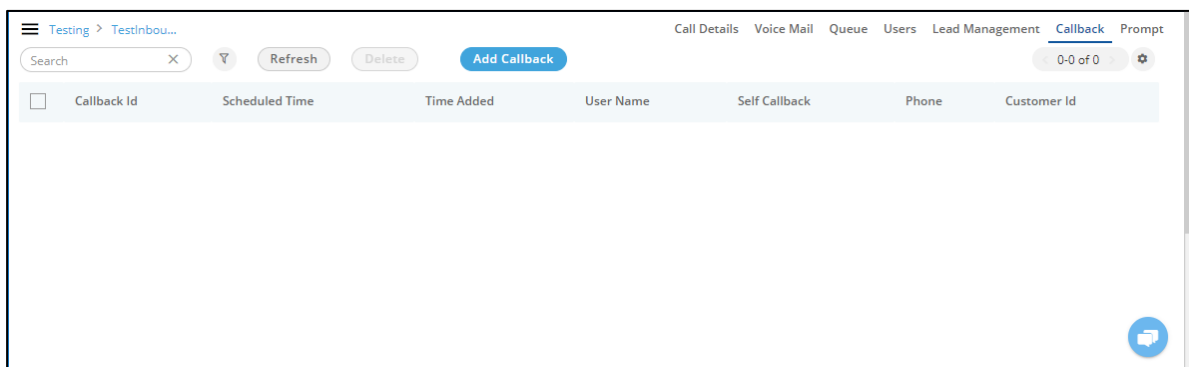


Figure: Callback Management in a Campaign

Supervisor can perform the following operations.

5.3.4.1 Add a Callback

Supervisor can add any callback by following below steps.

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

Figure: Adding a Callback

2. Select the callback date & time (mandatory fields) from calendar option.
3. Select any of the following callback types.
 - A. **Campaign:** Select it if callback has to be scheduled for the respective campaign in which Supervisor is logged in.
 - B. **User:** Select it if callback has to be scheduled for a selected user. After selecting user, select the user, for whom callback has to be scheduled, in the drop-down menu.
4. Enter the phone number (mandatory field) on which callback has to be scheduled.
5. Enter the Customer ID, if applicable. Else, leave it blank.
6. Click "**Save**" button to save the callback details.

Multiple Callbacks can be scheduled here.

Callback Id	Scheduled Time	Time Added	User Name	Self Callback	Phone	Customer Id
<input checked="" type="checkbox"/> d273-5bd95947-cm-0	02/11/2018, 04:00:00	31/10/2018, 19:10:30	test124	Yes	123456789	0
<input type="checkbox"/> d273-5bd95947-cm-1	01/11/2018, 12:00:00	31/10/2018, 19:10:46		No	14234567	0
<input type="checkbox"/> d273-5bd95947-cm-2	02/11/2018, 16:00:00	31/10/2018, 19:11:04	testpa1	Yes	457988798	0

Figure: Added Callbacks

Supervisor can edit and delete the selected callbacks. However, deleted callbacks cannot be restored.

5.3.4.2 Extract Callbacks

You can select multiple callbacks and click "Extract" in this pop-up to save the details of Callbacks as a CSV file on the disk. It shows the following dialog box.

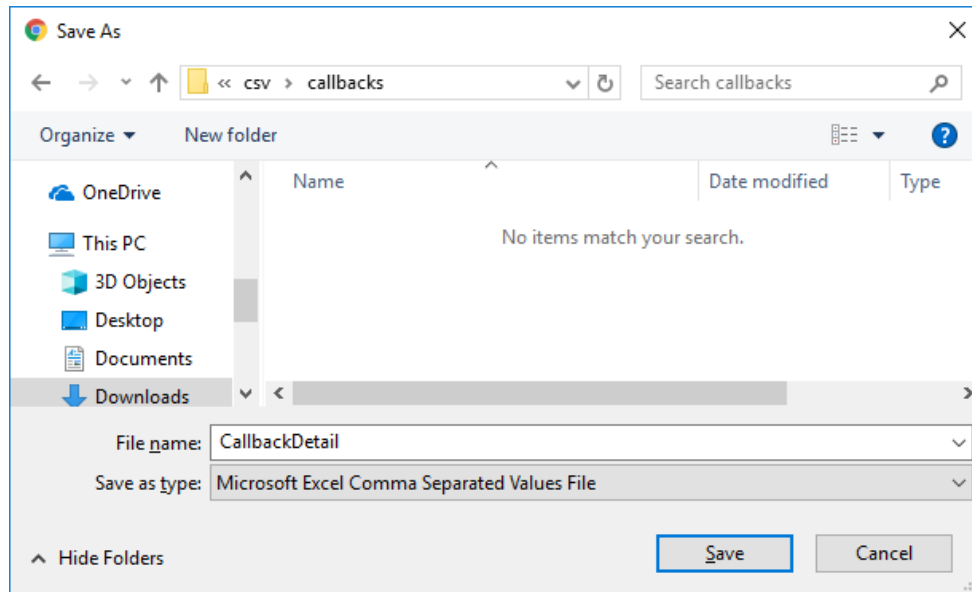


Figure: Extract Callbacks

Select the location and provide a name to the file. Click "Save" to save the details of callbacks in a file.

5.3.4.3 Settings


The Supervisor can set callback configuration by clicking  icon to access the callback settings. It shows the following pop-up.

Figure: Configure Callback

1. **Self Callback:** If this option is enabled (checkbox is checked) then the callbacks set using force dispose would be self callback by default.
2. **Max Callback Days:** Supervisor can define the maximum number of days after which the callback would be deleted from the system.
3. **Promote To Campaign Expiry Time (min):** It refers to the maximum number of minutes after which the self callback (if not attended by the respective agent) will get expired and transferred to the campaign (that is it can then be routed to any available agent of the campaign).
4. **Callback Retry Time (min):** It is the time after which callback will be dialed again in case it is failed in previous attempt.

5.3.4.4 Filter the View

Supervisor can click  icon to filter the callbacks.

Figure: Filter Callbacks

It contains the following filters.

- **User List:** Select the users of which callbacks have to be displayed.
- **Date Range Scheduled:** Select "From" and "To" Date and Time to see the callbacks scheduled between the specified range.
- **Date Range Added:** Select "From" and "To" Date and Time to see the callbacks added between the specified range.

Click "Apply" to apply the filters. After applying the filters, the Supervisor can click "Clear" to clear the filter and restore the default view of the callbacks.

5.3.5 Prompt Management

Supervisor can add, view, manage, and delete prompts here.

<input type="checkbox"/>	Name	File Name	Relative Path	Owner	Active	Action
<input checked="" type="checkbox"/>	Voicemail Finish1	voicemailfinish1.wav	ivr	sup2	No	Edit
<input type="checkbox"/>	Voicemail Start	voicemailstart1.wav	ivr	sup1	No	Edit
<input type="checkbox"/>	Welcome	welcome1.wav	ivr	sup1	No	Edit

Figure: Prompt Management in a Campaign

It shows the prompts that are already added by the Administrator in its console at the Campaign-level.

Supervisor can perform the following operations here.

5.3.5.1 Add Prompt

The Supervisor can upload the voice prompts. Uploaded prompts will be used in the IVR. Voice prompts should be uploaded in "16 - bit mono 8000 Hz" .wav format.

Perform the following steps to create a Prompt.

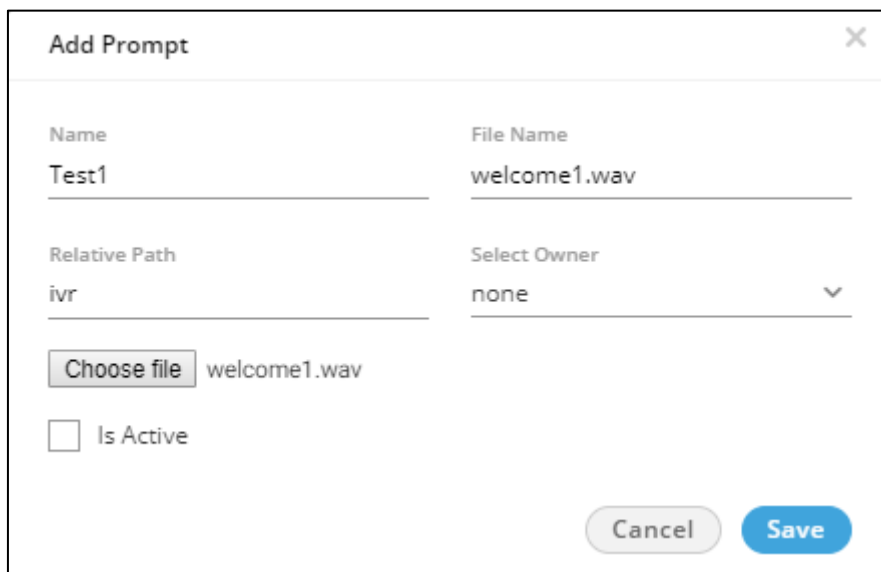
1. Click "Add Prompt" button in the top right corner. It shows the following pop-up.

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.

Supervisor can edit and delete the prompts.

5.4 Mange Outbound Campaign

Supervisor can manage the outbound campaigns in which it has been assigned.

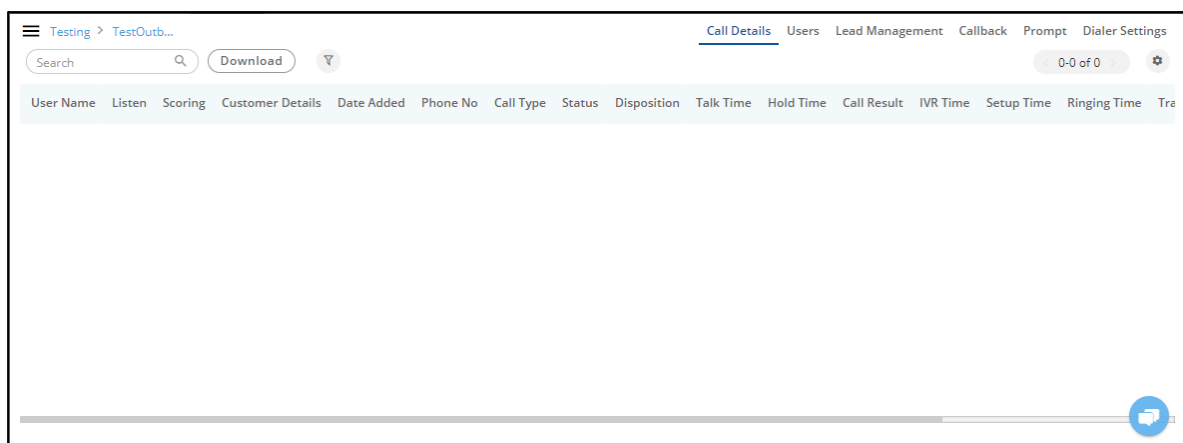


Figure: Manage Outbound Campaign

It contains the following tabs.

- **Call Details:** Here, the Supervisor can view the call details. This tab has already been discussed in Inbound Campaign. [Know more...](#)
- **Users:** Here, the Supervisor can assign or unassign the users in this campaign. The Supervisor can also manage the skills of the users. This tab has already been discussed in Chat Campaign. [Know more...](#)
- **Lead Management:** Here, the Supervisor can enable or disable the lead, map a lead to any queue, and view the lead summary. [Know more...](#)
- **Callback:** Here, the Supervisor can add and manage the callbacks. This tab has already been discussed in Inbound Campaign. [Know more...](#)
- **Prompt:** Here, the Supervisor can manage the Prompts. This tab has already been discussed in Inbound Campaign. [Know more...](#)
- **Dial Settings:** Here, the Supervisor can configure the dialer settings here. [Know more...](#)

5.4.1 Lead Management in Outbound Campaign

Supervisor can manage the leads and contacts and configure filters to filter the leads. It contains the following tabs. Click the links to know more about them.

1. [Manage Lead](#)
2. [Manage Contacts](#)
3. [Manage Filter](#)

5.4.1.1 "Manage Lead" Tab in Lead Management

In this tab, the Supervisor can see all leads (ID and Name), which are already created in the Process.

ID	Lead Name	Time Zone	Status	Priority	Weightage	Max Attempts	User Mapping	Queue Mapping
<input type="checkbox"/>	6	DefaultLead	<input type="checkbox"/>	1	1	10	---	Nothing Selected
<input type="checkbox"/>	9	Test1	Asia/Kolkata	<input type="checkbox"/>	1	10	---	Nothing Selected

Figure: Lead Management in Outbound Campaign

Here, Supervisor can perform the following operations.

5.4.1.1.1 Map Lead to any Queue

For any lead, select a queue and click "Apply".

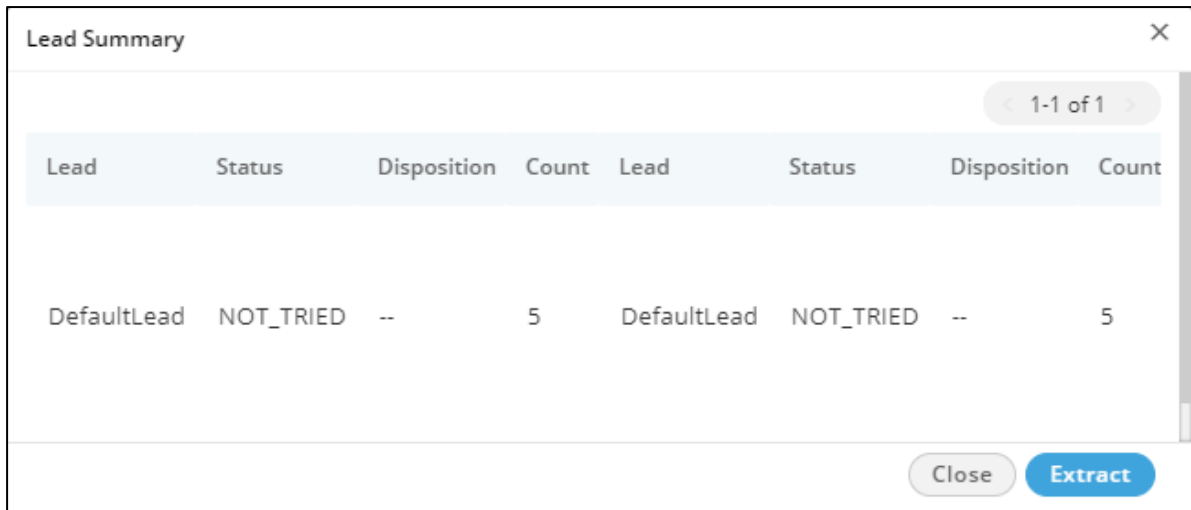
5.4.1.1.2 Enable or Disable the Lead

Click switch to enable the lead.

Click switch to disable the lead.

5.4.1.1.3 View Lead Summary

Select the leads and click "Lead Summary" to view and download the lead summary. It shows the following pop-up.



Lead Summary

< 1-1 of 1 >

Lead	Status	Disposition	Count	Lead	Status	Disposition	Count
DefaultLead	NOT_TRIED	--	5	DefaultLead	NOT_TRIED	--	5

Close Extract

Figure: Lead Summary

Click "Extract" in this pop-up to save the Lead Summary as a CSV file on the disk. It shows the following dialog box.

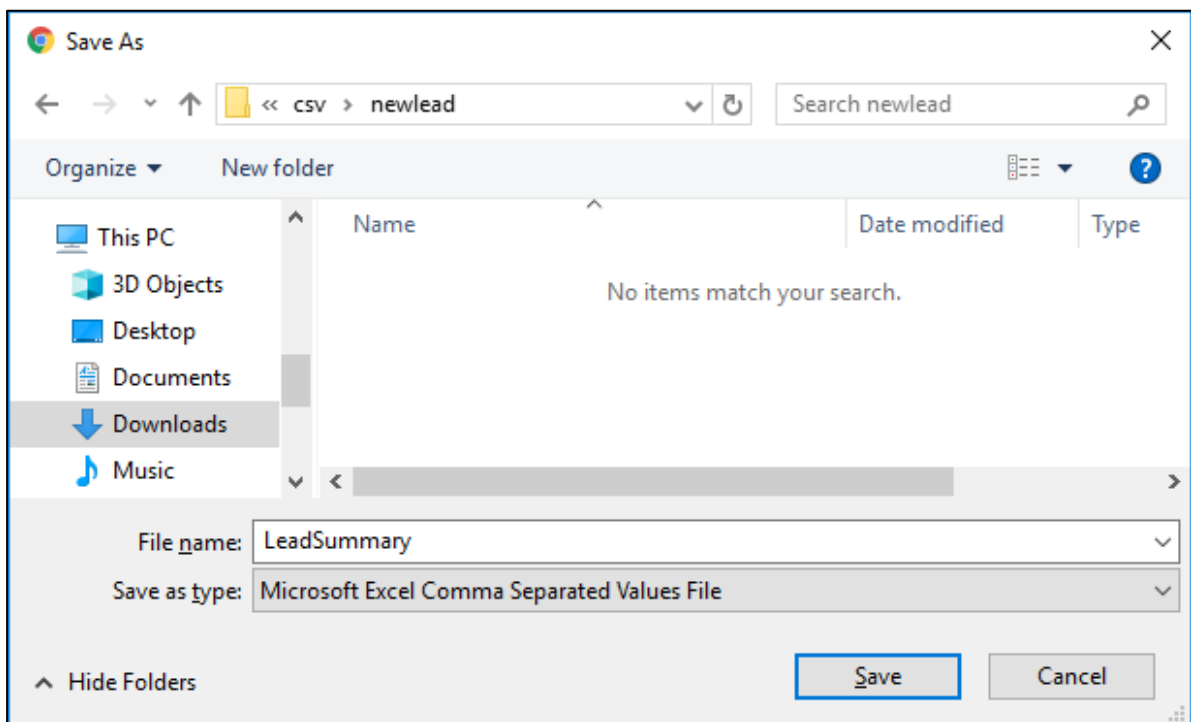


Figure: Lead Extraction

Select the location and provide a name to the file. Click "Save" to save the lead summary as the file.

5.4.1.1.4 Assign Priority

For any lead, the Supervisor can enter the priority in numbers. Here, "1" stands for First Priority and the lead with First Priority will be dialed first. The lead with "2" (Second) Priority will be dialed second and so on.

5.4.1.1.5 Assign Weightage

For any lead, the Supervisor can enter the weightage in the numbers. It is the ratio that will be assigned by the dialer. This will only work if the priority of the leads are same.

Use Case: If there are more than one lead with same weightage then dialer will prefer the lead with more weightage. For example, if Lead 1 has 2 Priority with 40 weightage and Lead 2 has 2 Priority with 50 weightage, then Lead 2 will be dialed in the higher ratio.

5.4.1.1.6 Assign Maximum Attempts

Here, the Supervisor can define the number of retry attempts for a customer. The number will not be retried after the provided maximum number of attempts.

5.4.1.1.7 User Mapping

Supervisor can click "---" link under "User Mapping" header for any lead to map the users with the lead and the queue. Only the selected users will get calls dialed by the dialer for this lead.

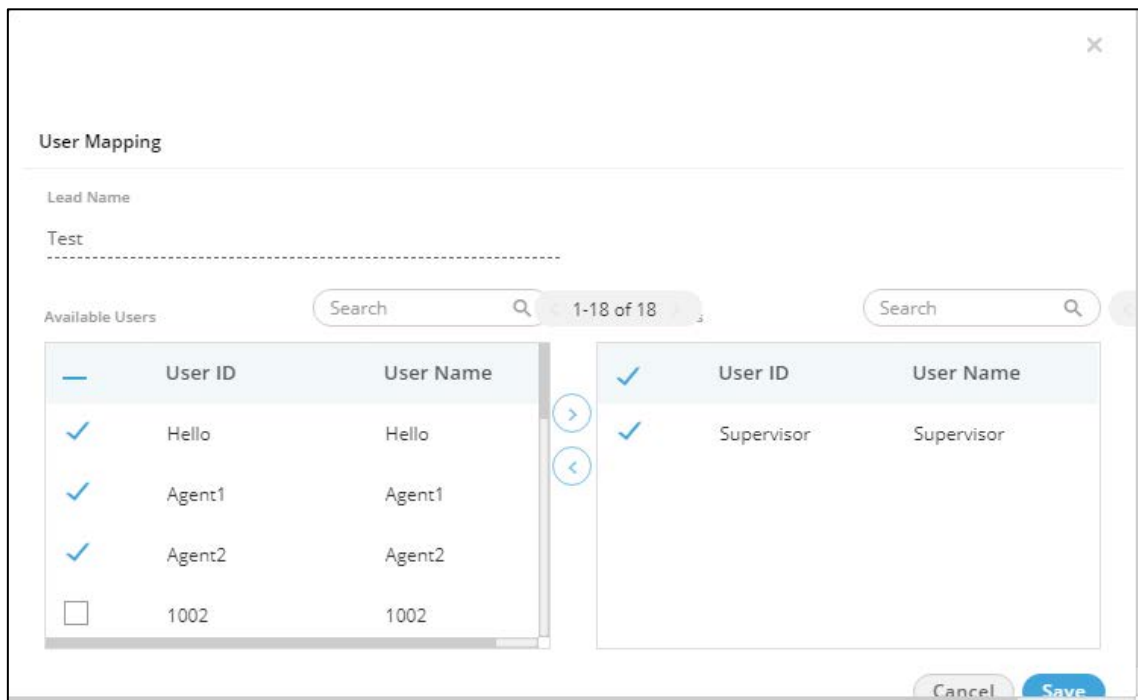



Figure: Map Users with Lead

Perform the following steps here to assign or unassign the users.

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

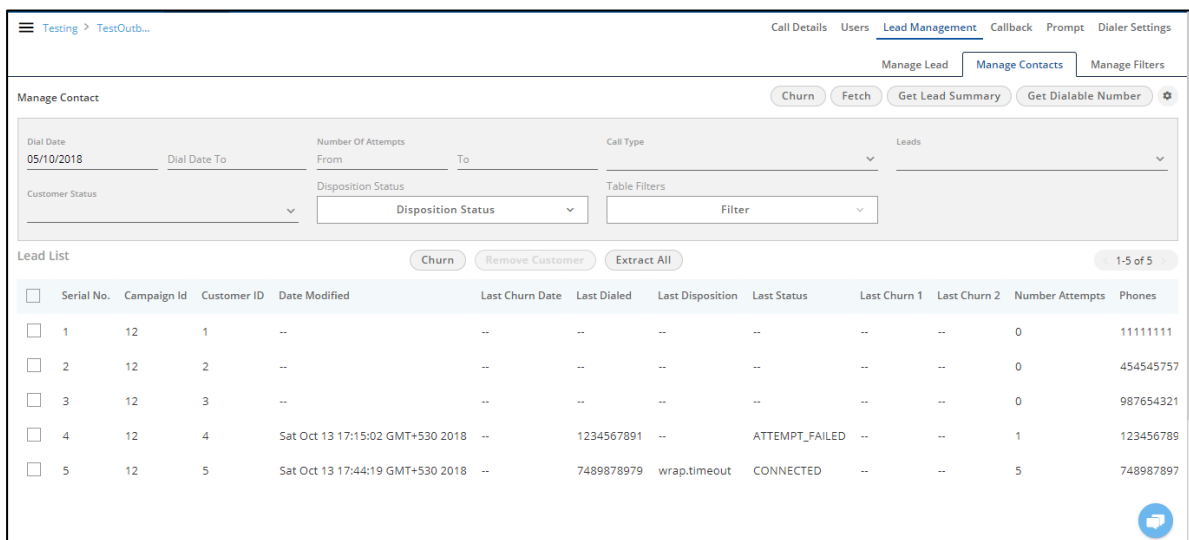
You can also search for the user names in the provided search box.

2. Click  icon to add the selected users.
3. Click "Apply" to apply the settings.

To unassign the users, select the users in "Assigned "Users" section and click  icon. Click "Apply" to make the changes.

5.4.1.2 "Manage Contacts" Tab in Lead Management

Here, the Supervisor can manage the contacts in a lead. Click "Fetch Lead" button to fetch the leads and see them here.



Serial No.	Campaign Id	Customer ID	Date Modified	Last Churn Date	Last Dialed	Last Disposition	Last Status	Last Churn 1	Last Churn 2	Number Attempts	Phones
1	12	1	--	--	--	--	--	--	--	0	11111111
2	12	2	--	--	--	--	--	--	--	0	454545757
3	12	3	--	--	--	--	--	--	--	0	987654321
4	12	4	Sat Oct 13 17:15:02 GMT+530 2018	--	1234567891	--	ATTEMPT_FAILED	--	--	1	123456789
5	12	5	Sat Oct 13 17:44:19 GMT+530 2018	--	7489878979	wrap.timeout	CONNECTED	--	--	5	748987897

Figure: Manage Contacts

Here, Supervisor can perform the following operations.

5.4.1.2.1 Churn the Leads

The Supervisor can churn the lead, that is, can set the status of records as "Not Tried". So, the churned records can be redialed by dialer.

1. Click "Churn" button. It shows a pop-up

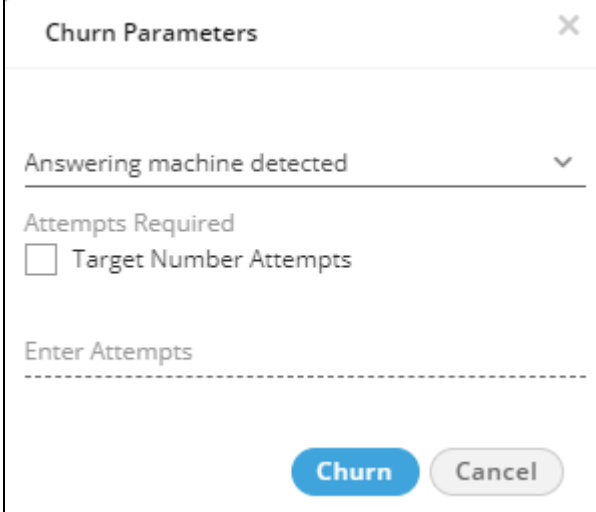

A dialog box titled "Churn Parameters" with a close button (X) in the top right corner. It contains a dropdown menu with "Answering machine detected" selected. Below the dropdown is the text "Attempts Required" followed by a checkbox labeled "Target Number Attempts". Underneath is a dashed line with the text "Enter Attempts" above it. At the bottom are two buttons: "Churn" (blue) and "Cancel" (grey).

Figure: Churn Leads

2. Now, select the target customer status (status of records which needs to be churned) from the drop down like Answering machine detected, Provider Failure etc.
3. Specify the number of target attempts.
4. Click "**Churn**" to churn the numbers.

5.4.1.2.1.1 Churn Exclude Dispositions

Supervisor can click  icon on the top right corner to exclude the dispositions from the churning. It shows the following pop-up.

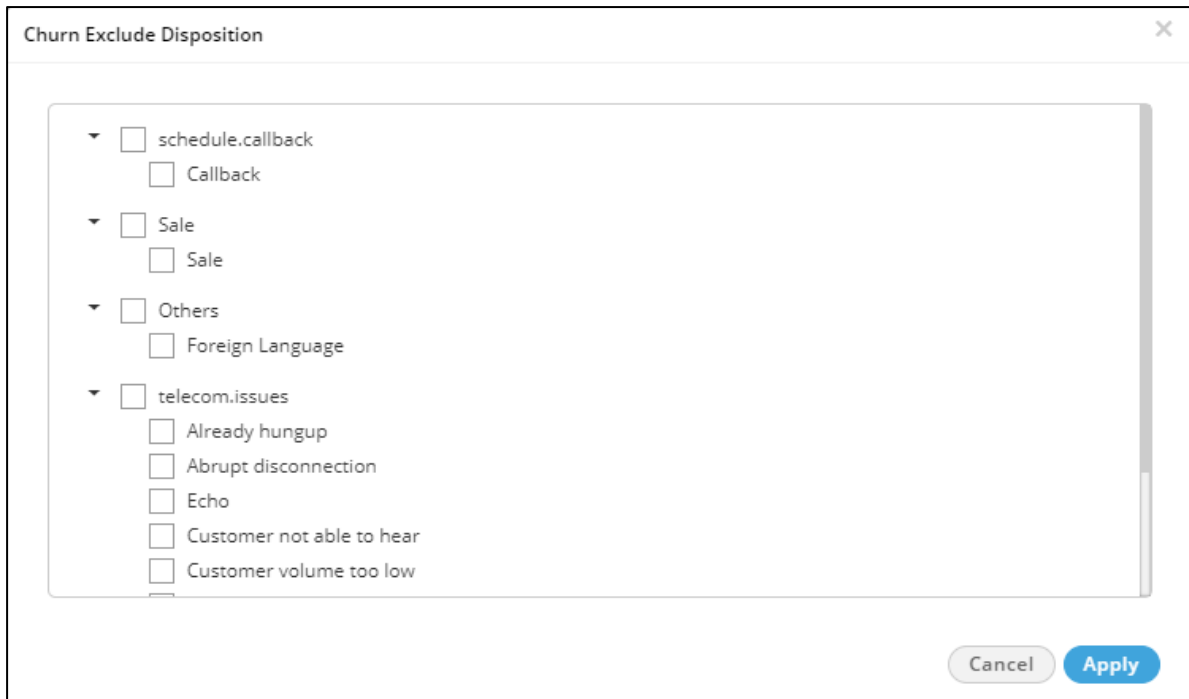


Figure: Dispositions List

Here, the supervisor can select the desired user disposition parameters that should be excluded from churning. For example, if sale disposition need not be churned then it can be marked as excluded Disposition. Now when user attempts churn process and chooses a target Disposition code, then Ameyo will churn all dispositions except "Sale" which will be excluded from churn.

5.4.1.2.2 Get Lead Summary

The Supervisor can fetch the lead summary of selected leads by clicking on "Get Lead Summary" button. It shows a pop-up.

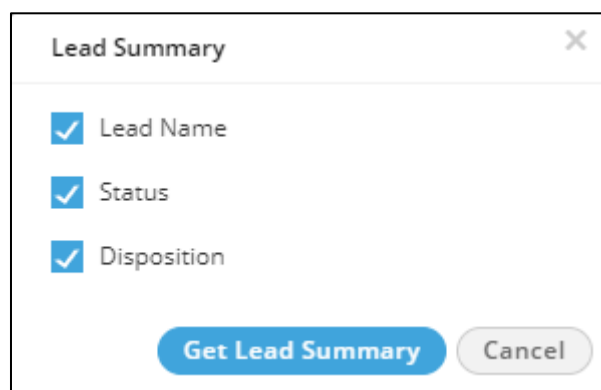


Figure: Summary of Leads

Here, the Supervisor can uncheck the checkbox provided against the headers which are not required or which the supervisor does not want to see in lead summary (as in lead summary only checked headers will be shown). Lead summary is displayed with the following attributes:

- **Lead Name:** It shows the lead name.
- **Status:** It shows the current dialed status of the numbers uploaded in the respective lead.
- **Disposition:** It shows the user disposition with which contacts have been disposed. It will be visible for connected calls only.

Lead	Status	Disposition	Count
DefaultLead	ATTEMPT_FAILED	-	1
DefaultLead	CONNECTED	wrap.timeout	1
DefaultLead	NOT_TRIED	-	3

⚠ Timezone Dialing Restriction is not considered

Cancel Extract

Figure: Summary of Leads

Click "Extract" in this pop-up to save the Lead Summary as a CSV file on the disk. It shows the following dialog box.

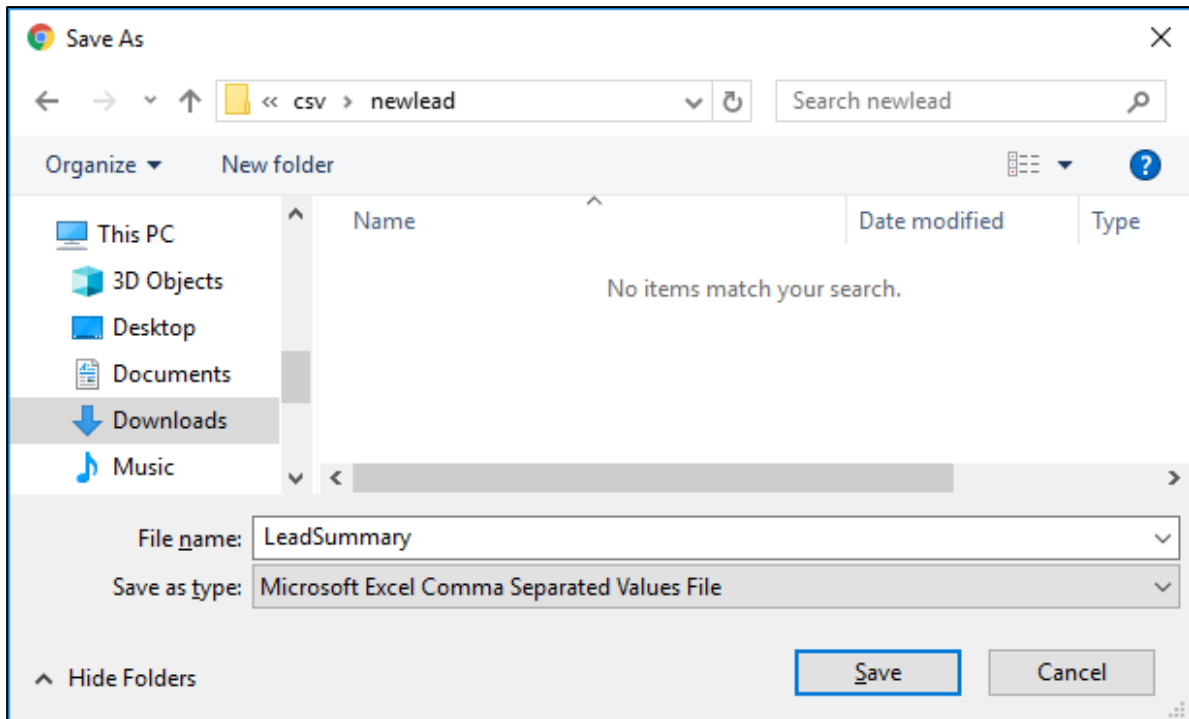


Figure: Lead Extraction

Select the location and provide a name to the file. Click "Save" to save the lead summary as the file.

5.4.1.2.3 Get Dialable Numbers

Click "Get Dialable Numbers" to view the list of dialable numbers in the fetched lead. It shows the following pop-up.

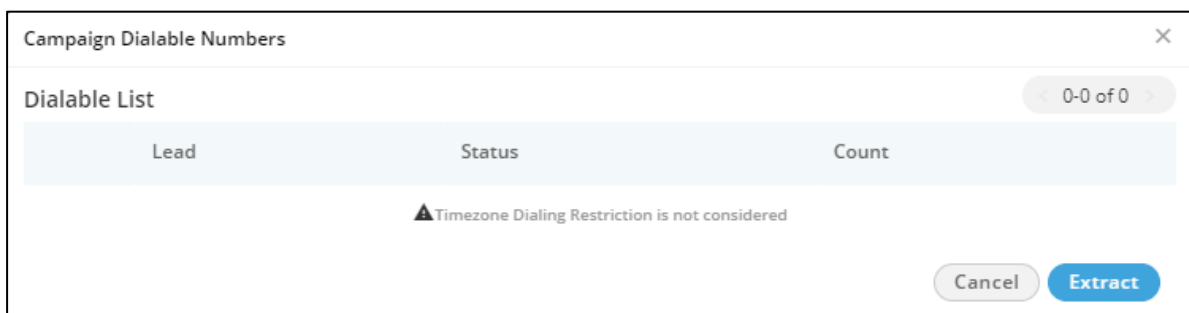


Figure: List of Dialable Numbers

You can click "Extract" to save the list of dialable numbers as CSV file on the disk.

5.4.1.2.4 View and Filter Lead List

The top section lists the filters. The Supervisor can select any of these filters to filter the lead list.

- **Dial Date:** Select its "From" and "To" dates to list the numbers from the leads dialed between the selected duration.
- **Number of Attempts:** Select the range of number of attempts.
- **Call Type:** Select the type of calls to be listed in the lead.
 - Auto Dial
 - Auto Preview Dial
 - Call Back Dial
 - Click to Call Dial
 - Inbound Dial
 - Inbound Dial Customer
 - Manual Dial
 - Manual Preview Dial
 - Pick Call Dial
 - Transferred to Campaign Dial
- **Leads:** Select the leads to list their numbers.
- **Customer Status:** Select the customer status.
- **Disposition Status:** Select the disposition status.
- **Table Filters:** Select the table filters.

After applying any of these filters, click "Fetch" to list the numbers of the leads.

5.4.1.3 "Manage Filter" Tab in Lead Management

Here, the Supervisor can define the filters to filter the leads. Only the filtered numbers will be dialed and the exclusions will not be dialed.

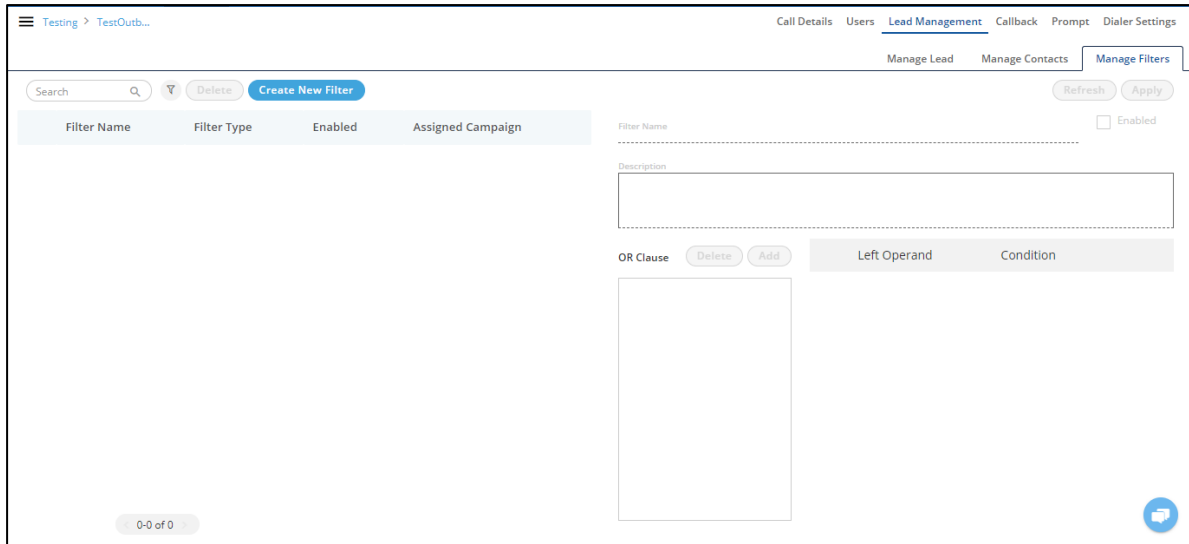


Figure: Filter Leads

Perform the following steps to add a filter.

1. Click "Create New Filter" to create a new filter.

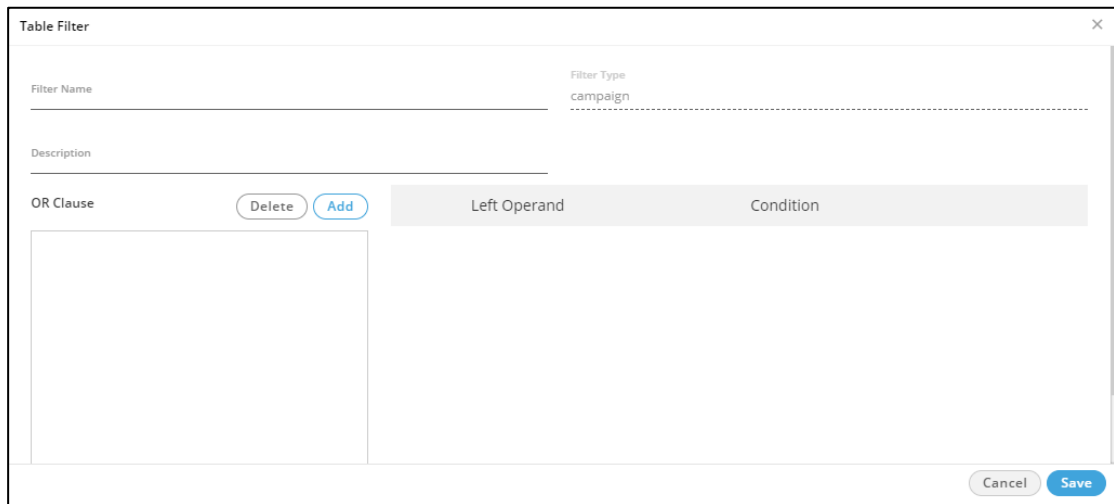


Figure: Create a Filter

2. **Filter Name:** Provide a name of the filter.
3. **Filter Type:** By default, it will be campaign.
4. **Description:** Enter the description regarding the filter.
5. Click "Add" to add a clause. Each clause has a condition to filter the table. It adds a Clause in the left side and add a new row on the right side.

6. Perform the following steps to add a condition in a newly added clause.
 - A. In a row, you can select "Left Operand" in the drop-down menu. It contains the following options.
 - ATTEMPTS
 - customerid
 - DISPOSITION
 - email
 - facebook
 - IS_CALLBACK_SCHEDULED
 - IS_EXCLUDED_DISPOSED
 - LAST_CALL_TYPE
 - LAST_CHURN_1
 - LAST_CHURN_2
 - LAST_DIALED_NUMBER
 - LAST_DIALED_NUMBER_1
 - LAST_DIALED_NUMBER_2
 - LAST_DIALED_NUMBER_3
 - LAST_DIALED_NUMBER_4
 - LAST_DIALED_TIME
 - LAST_USER_ID
 - LEAD_ID
 - name
 - NUMBER_STATUS
 - phone1
 - phone2
 - phone3
 - phone4

- phone5
- timezone
- twitter

- Provide a value for the selected "Left Operand" in the cell under "Condition" column.
- You can click "+" icon on the right side of a row to add a new condition.

To delete a condition, you can click "x" icon on the right side of a row.

- You can click "Add" again to add a new clause. After adding the clause, you can add the condition rows in it.

You can click the clause names in the box located on bottom left side to navigate between the clauses.

- To delete a clause, select it in the box and click "Delete". Following screenshot contains the sample values to create a table filter.

Left Operand	Condition	
phone2	123456789	+
AND ATTEMPTS	1	x

Figure: Creating Filter

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

Supervisor can enable, disable, modify, or delete a filter.

5.4.2 Dialer Settings

Through this tab, Supervisor can configure Dialer Settings for outbound campaigns. This includes dialing algorithm type, enable AMD and types of AMD etc. In order to undo the required changes before saving, Supervisor can click on "Refresh" button while to save the required changes, Supervisor has to click on "Apply" button.

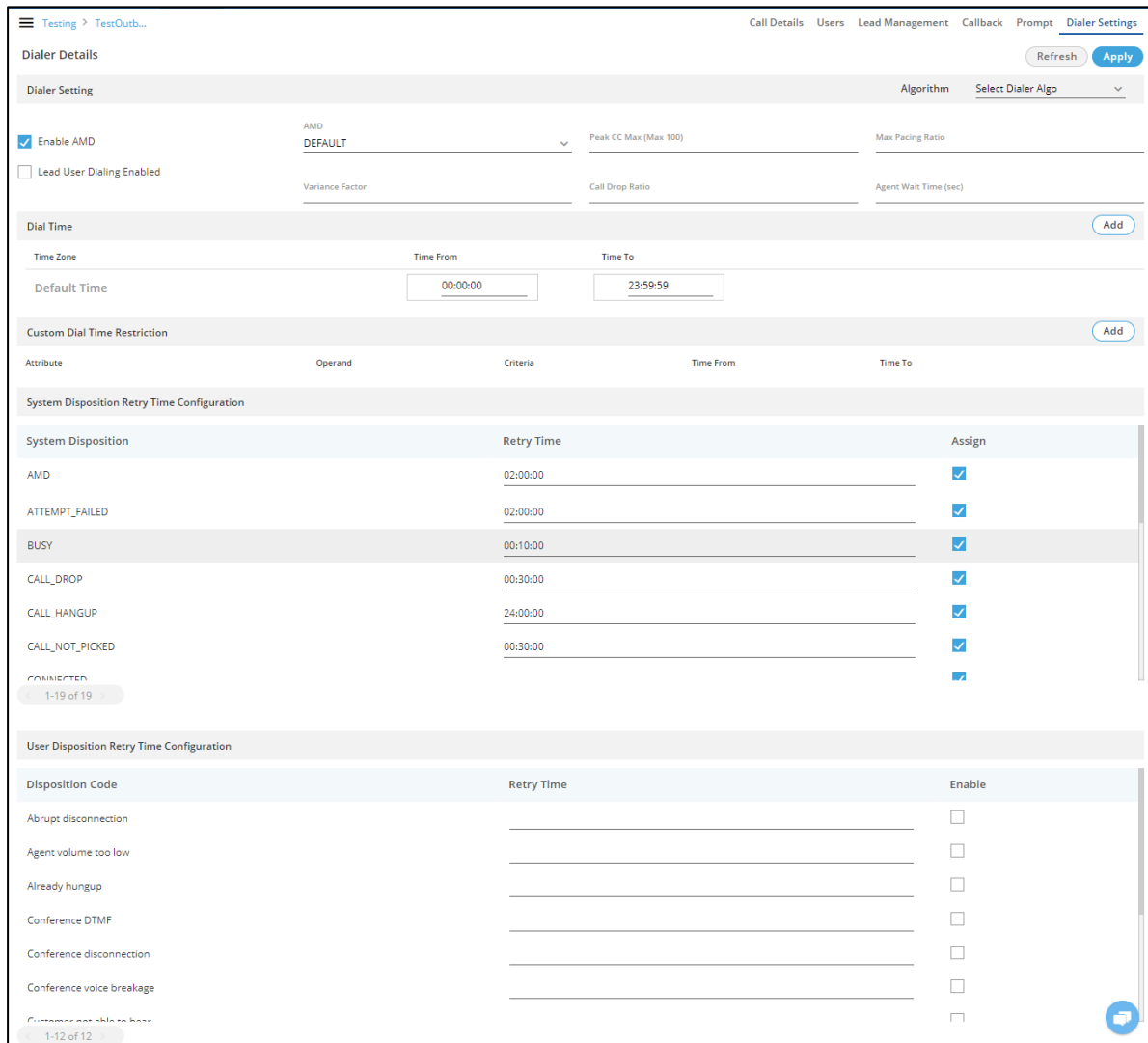


Figure: Dialer Settings

5.4.2.1 Algorithms

The Supervisor can select the following algorithms for outbound dialing.

5.4.2.1.1 Progressive Dialer

It works in a similar manner as the Predictive mode, except that dialing only begins once an agent becomes available. Number of calls dialed are equal to the number of available agents. Progressive dialing factors include peak CC.

Dialer Setting		Algorithm
<input checked="" type="checkbox"/> Enable AMD	AMD DEFAULT	Progressive
	Peak CC Max (Max 100) 20	

Figure: Progressive Dialer Settings

- **AMD:** If Supervisor wants to disable Answering Machine detection (AMD) in auto dialing then the supervisor can select "**None**".
- **Peak Call Count:** Supervisor can specify the maximum number of simultaneous calls which should be dialed by the dialer for particular campaign. The default value is 100, but this can be changed at the Campaign-level by the Administrator.

5.4.2.1.2 Fixed/Paced Progressive

In this dialing algorithm, a fixed number of calls are enqueued and passed to available agents. The deciding factor in fixed-pacing dialing is max pacing ratio and peak CC. The total number of calls enqueued is equal to the max pacing ratio multiplied by the available agents. For eg., let's say we have defined max pacing ratio as 2.5 and the available agents are 2, then the total number of calls to be dialed will be 5 but if peak CC is less than 5 then the number of calls to be dialed will be equal to peak CC.

Dialer Setting		Algorithm
<input checked="" type="checkbox"/> Enable AMD	AMD DEFAULT	Fixed/Paced Progressive
	Peak CC Max (Max 100) 20	Max Pacing Ratio 2

Figure: Fixed Pacing Dialer Settings

- **AMD:** If Supervisor wants to disable Answering Machine detection (AMD) in auto dialing then the supervisor can select "**None**".
- **Peak Call Count Max (Max 100):** Supervisor can specify the maximum number of simultaneous calls which should be dialed by the dialer for a particular campaign. Maximum value that can be defined is 100.

- **Max Pacing Ratio:** This parameter controls the ratio of dialing calls to the free agents. A higher value implies an increase in the number of dialing calls.

5.4.2.1.3 Predictive Dialing

It is most productive dialing algorithm for agents. Predictive dialers use historical statistics and intelligence to calculate agent availability. Thus, based on past trends, the solution will know exactly how many dialing attempts and how much time is required to reach a live contact. A call is transferred to an agent only when it becomes live, thus avoiding the call drop and answering machine detection. Predictive algorithm depends on a number of factors, including peak CC, max pacing ratio, variance factor, agent wait time and call drop ratio.

Dialer Setting		Algorithm Predictive	
<input checked="" type="checkbox"/> Enable AMD	AMD DEFAULT	Peak CC Max (Max 100) 20	Max Pacing Ratio 2
Variance Factor 100	Call Drop Ratio 5	Agent Wait Time (sec) 5	

Figure: Predictive Dialer Settings

- **AMD:** If Supervisor wants to disable Answering Machine detection (AMD) in auto dialing then the supervisor can select "**None**"
- **Peak Call Count Max (Max 100):** Supervisor can specify the maximum number of simultaneous calls which should be dialed by the dialer for a particular campaign. Maximum value that can be defined is 100.
- **Max Pacing Ratio:** This parameter controls the ratio of dialing calls to the free agents. A higher value implies an increase in the number of dialing calls.
- **Variance Factor:** It defines how effectively the settings of Maximum Pacing Ratio / Call Drop Ratio / Agent Wait Time can be followed.
- **Call Drop Ratio:** This parameter allows the number of customer to be on hold if all the executives are busy.
- **Agent Wait Time (sec):** This parameter allows to define the minimum wait time between 2 autodialed calls.

5.4.2.1.4 Preview Dialing

During auto outbound preview dialing, the system gives a preview popup to the available agent. Agent can preview the account and choose to dial or reject to move to the next account. Preview dialing factors include peak CC.

Figure: Preview Dialer Settings

- **AMD:** If Supervisor wants to disable Answering Machine detection (AMD) in auto dialing then the supervisor can select "**None**".
- **Peak Call Count:** Supervisor can specify the maximum number of simultaneous calls which should be dialed by the dialer for a particular campaign. Maximum value that can be defined is 100.

5.4.2.2 Manage Time Zone in "Dial Time"

Supervisor can define the time zone in which dialing needs to be restricted for specific country timezone by clicking on "Add" button.

Figure: Time Zone Settings

By default, a Default Time Zone is defined. The Supervisor can specify the default time range that the dialer would refer.

- Select the timezone from the drop down and specify the time range (Time from and Time To in hh:mm:ss format).
- Any record can be deleted by clicking "X" icon.

5.4.2.3 Custom Dial Time Restriction

This feature is used for limiting the auto-dialing based on several attributes like phone, name and timezone. Custom dial time restriction can be added by clicking on "Add" button.

Custom Dial Time Restriction					Add
Attribute	Operand	Criteria	Time From	Time To	
phone1	is equal to (=)	Criteria	hh:mm:ss	hh:mm:ss	X

Figure: Custom Dial Time Restriction

You can click "X" icon in the end of the row of a custom time zone to delete it.

5.4.2.4 Retry Time Settings

Retry Time is the time duration after which the dialer will retry for those numbers, which do not get connected in the first attempt.

5.4.2.4.1 System Disposition Retry Time Configuration

Supervisor can configure the retry time for different system dispositions. The Supervisor can also assign the system dispositions to the respective campaign. If the system disposition is not assigned in this tab then the retry time defined for that system disposition will not work.

System Disposition Retry Time Configuration		
System Disposition	Retry Time	Assign
AMD	02:00:00	<input checked="" type="checkbox"/>
ATTEMPT_FAILED	02:00:00	<input checked="" type="checkbox"/>
BUSY	00:10:00	<input checked="" type="checkbox"/>
CALL_DROP	00:30:00	<input checked="" type="checkbox"/>
CALL_HANGUP	24:00:00	<input checked="" type="checkbox"/>
CALL_NOT_PICKED	00:30:00	<input checked="" type="checkbox"/>
CONNECTED		<input checked="" type="checkbox"/>
FAILED	00:20:00	<input checked="" type="checkbox"/>
NOT_TRIED		<input checked="" type="checkbox"/>
NO_ANSWER	03:00:00	<input checked="" type="checkbox"/>
NUMBER_FAILURE	24:00:00	<input checked="" type="checkbox"/>
NUMBER_TEMP_FAILURE	02:00:00	<input checked="" type="checkbox"/>
PROVIDER_FAILURE	03:00:00	<input checked="" type="checkbox"/>
PROVIDER_TEMP_FAILURE	01:00:00	<input checked="" type="checkbox"/>
SIT_INTERCEPT	01:00:00	<input checked="" type="checkbox"/>
SIT_NOCIRCUIT	01:00:00	<input checked="" type="checkbox"/>
SIT_REORDER	02:00:00	<input checked="" type="checkbox"/>
SIT_VACANT	72:00:00	<input checked="" type="checkbox"/>
SYSTEM_ERROR	02:00:00	<input checked="" type="checkbox"/>

< 1-19 of 19 >

Figure: System Disposition Retry Time Settings

System dispositions will be assigned by checking the assign checkbox of that particular system disposition.

5.4.2.4.2 User Disposition Retry Time Configuration

Supervisor can configure the retry time for different user dispositions. Supervisor has to select the dispositions and provide the retry time for each selected disposition

User Disposition Retry Time Configuration		
Disposition Code	Retry Time	Enable
Abrupt disconnection	_____	<input type="checkbox"/>
Agent volume too low	_____	<input type="checkbox"/>
Already hungup	_____	<input type="checkbox"/>
Conference DTMF	_____	<input type="checkbox"/>
Conference disconnection	_____	<input type="checkbox"/>
Conference voice breakage	_____	<input type="checkbox"/>
Customer not able to hear	_____	<input type="checkbox"/>
Customer volume too low	_____	<input type="checkbox"/>
Echo	_____	<input type="checkbox"/>
Foreign Language	_____	<input type="checkbox"/>
Sale	_____	<input type="checkbox"/>
Voice breakage	_____	<input type="checkbox"/>

Figure: User Dispositions Retry Time Settings

5.5 Manage Parallel Predictive Campaign

Supervisor can manage the Parallel Predictive campaigns in which it has been assigned.

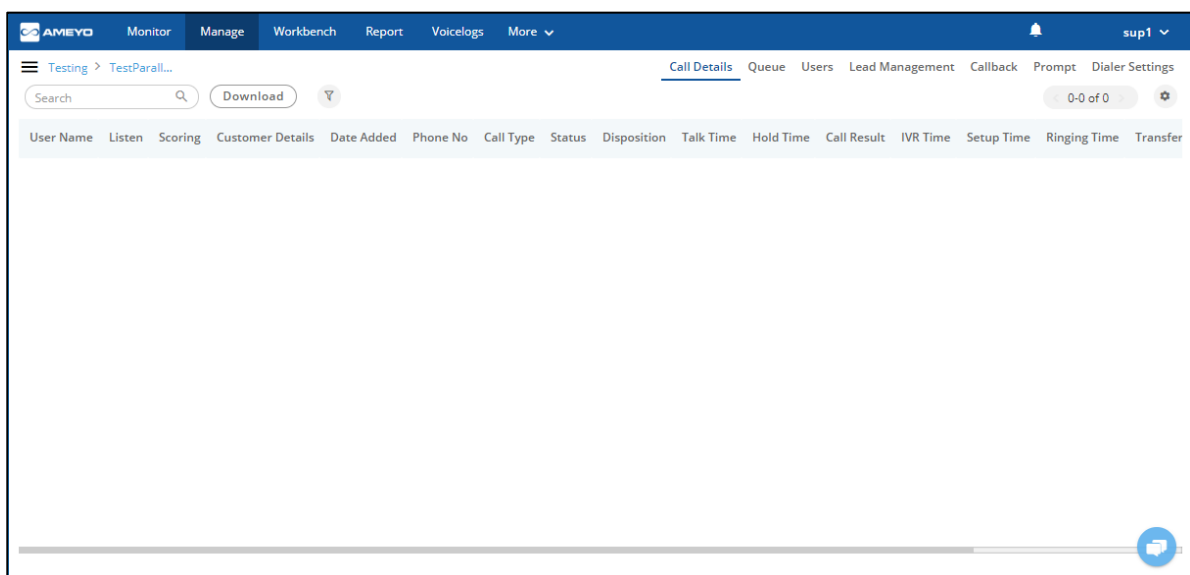


Figure: Manage Parallel Predictive Campaign

It contains the following tabs.

- **Call Details:** Here, the Supervisor can view the call details. This tab has already been discussed in Inbound Campaign. [Know more...](#)
- **Queue:** Here, the Supervisor can add, edit, and delete the queues in the Interaction Campaign. This tab has already been discussed in Chat Campaign. [Know more...](#)
- **Users:** Here, the Supervisor can assign or unassign the users in this campaign. The Supervisor can also manage the skills of the users. This tab has already been discussed in Chat Campaign. [Know more...](#)
- **Lead Management:** Here, the Supervisor can enable or disable the lead, map a lead to any queue, and view the lead summary. This tab has already been discussed in Outbound Campaign. [Know more...](#)
- **Callback:** Here, the Supervisor can add and manage the callbacks. This tab has already been discussed in Inbound Campaign. [Know more...](#)
- **Prompt:** Here, the Supervisor can manage the Prompts. This tab has already been discussed in Inbound Campaign. [Know more...](#)
- **Dialer Settings:** Here, the Supervisor can configure the dialer settings here. This tab has already been discussed in Outbound Campaign [Know more...](#)

5.6 Manage Voice Blast Campaign

Supervisor can manage the Voice Blast campaigns in which it has been assigned.

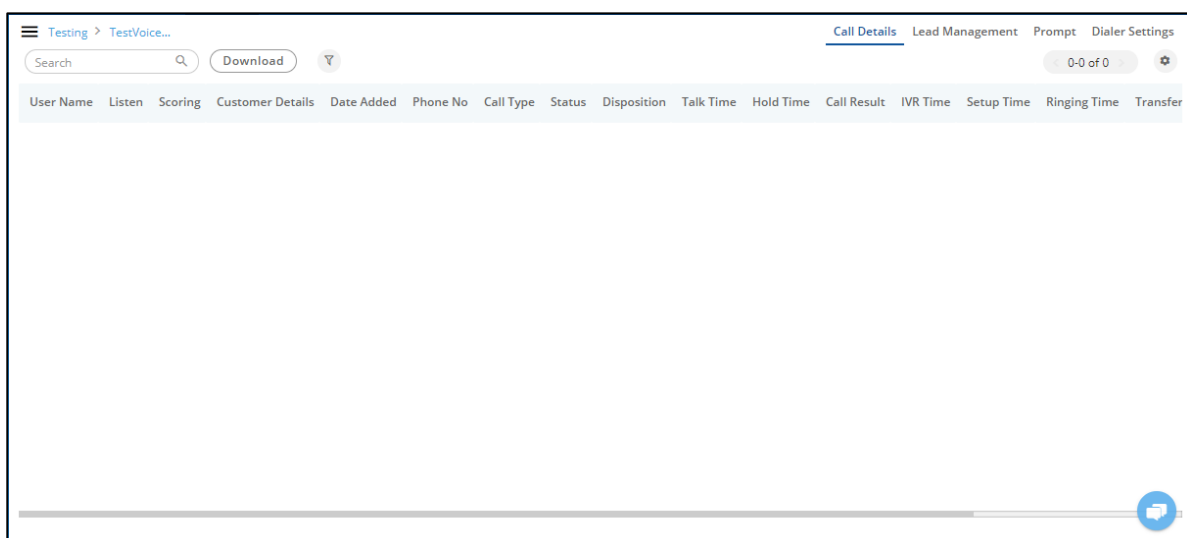


Figure: Manage Voice Blast Campaign

It contains the following tabs.

- **Call Details:** Here, the Supervisor can view the call details. This tab has already been discussed in Inbound Campaign. [Know more...](#)
- **Lead Management:** Here, the Supervisor can enable or disable the lead, map a lead to any queue, and view the lead summary. This tab has already been discussed in Outbound Campaign. [Know more...](#)
- **Prompt:** Here, the Supervisor can manage the Prompts. This tab has already been discussed in Inbound Campaign. [Know more...](#)
- **Dialer Settings:** Here, the Supervisor can configure the dialer settings here. This tab has already been discussed in Outbound Campaign [Know more...](#)

6. Workbench

Supervisor can click "Workbench" to login as a user to the Email, Chat, and Voice Campaigns. Perform the following steps to login to the campaigns.

1. Click "Workbench". "**Campaign Selection**" pop-up is displayed on the screen.

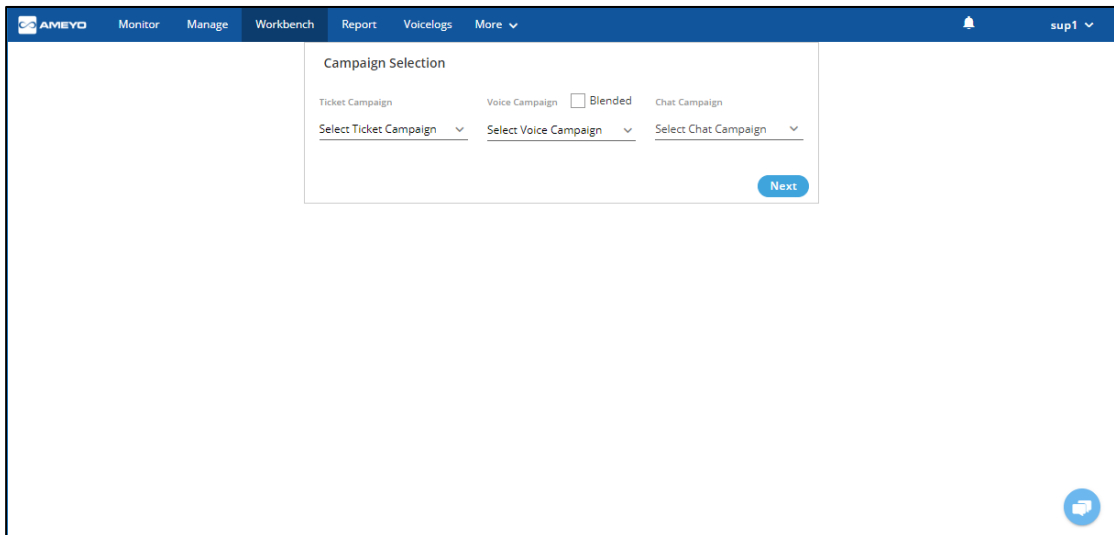


Figure: Select the Campaign

2. Here, the Supervisor has to select any or multiple of the following campaign types in which it wants to login. The list will contain only those campaigns in which the Supervisor has been assigned by the Administrator.
 - Ticket/Email (Interaction) Campaign
 - Voice Campaign
 - Inbound Voice Campaign
 - Outbound Voice Campaign
 - Parallel Predictive Voice Campaign
 - Chat Campaign

Supervisor can login to these three types of campaigns collectively.

If Administrator have configured the default working for the Supervisor in any campaign, then the Supervisor will be logged on directly to that campaign. Supervisor can be set to

logon to multiple Chat Campaigns, multiple Voice Campaigns, and multiple Interaction Campaigns collectively, to which it has been assigned.

3. **Blended Campaign:** The Administrator can configure blended campaign, which allow the agents 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 for Supervisor also.

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

The screenshot shows a 'Campaign Selection' form. It has three main sections: 'Ticket Campaign' with a dropdown menu labeled 'Select Ticket Campaign', 'Voice Campaign' with a dropdown menu labeled 'Select Voice Campaign', and 'Chat Campaign' with a dropdown menu labeled 'Select Chat Campaign'. Above the 'Voice Campaign' dropdown, there is a checkbox labeled 'Blended' which is currently unchecked. The dropdown menu for 'Voice Campaign' is open, showing three options: 'Select Voice Campaign', 'Inbound', and 'TestParallelVoice'. A blue 'Next' button is located at the bottom right of the form.

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.

The screenshot shows the same 'Campaign Selection' form. In this version, the 'Blended' checkbox is checked. The dropdown menu for 'Voice Campaign' is open, showing three options: 'Select Voice Campaign', 'TestInbound', and 'TestOutbound'. The 'Next' button remains at the bottom right.

Figure: Selecting Blended Campaigns

Supervisor 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.

Figure: Selected the Campaigns

4. Click "Next" to proceed. The Supervisor will be logged on to the campaigns.

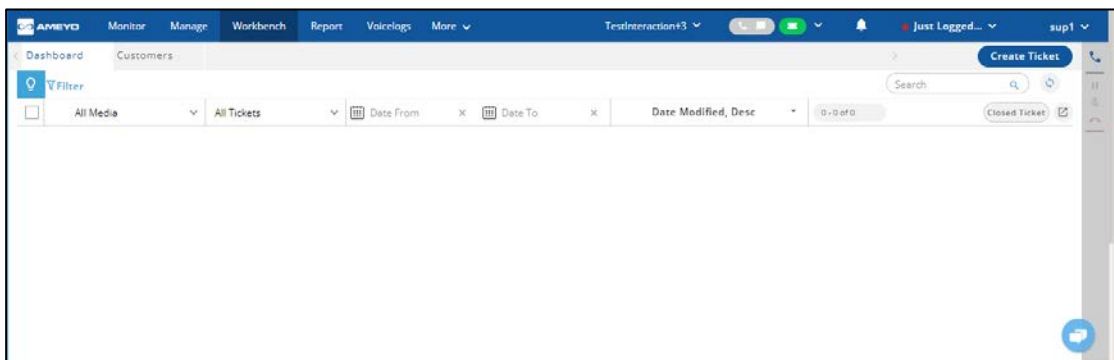


Figure: Home Screen

Here, Supervisor can perform the following operations.

- [Set Availability](#)
- [Ticket Creation](#)
- [Ticket Operations](#)
- [View Dashboard of Workbench](#)
- [Manage Customers](#)
- [Customer Communication](#)
 - [Email Communication](#)
 - [Chat Communication](#)
 - [Voice Communication](#)

- [Inbound Call](#)
- [Outbound Call](#)
 - [View Customer Information and Click to Call](#)
 - [Manual Dial Outbound Call](#)
 - [Manual Preview Dial Outbound Call](#)
 - [Auto-dial Outbound Call](#)
- [Call Control Functions](#)
- [Schedule Callback](#)
- [Callback Notifications](#)

After logging on to campaigns in the Workbench, if Supervisor is browsing other tabs in its Console, following pop-up will come on the screen whenever an incoming call or chat comes to Supervisor.

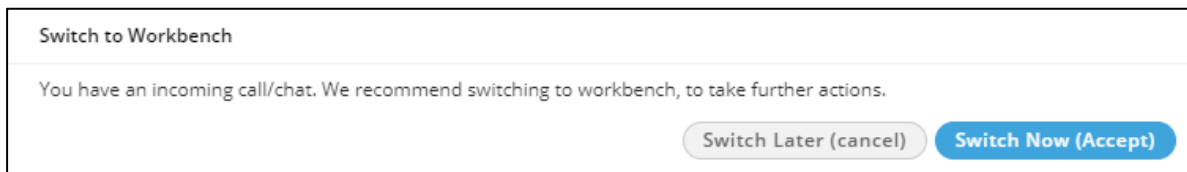



Figure: Switch to Workbench

6.1 Set Availability in Workbench

1. Once the Supervisor is logged on to the Workbench, the Supervisor needs to ensure that WebRTC status indicator turns "Green" (WebRTC is registered) after a few seconds. If the WebRTC status indicator remains "Red" then it shows that WebRTC is not registered and the Supervisor will not be able to make or receive calls. It is suggested to contact your Administrator immediately, if WebRTC remains "RED" for a longer duration.
2. Click  to access the WebRTC pop-up in the top-right corner.

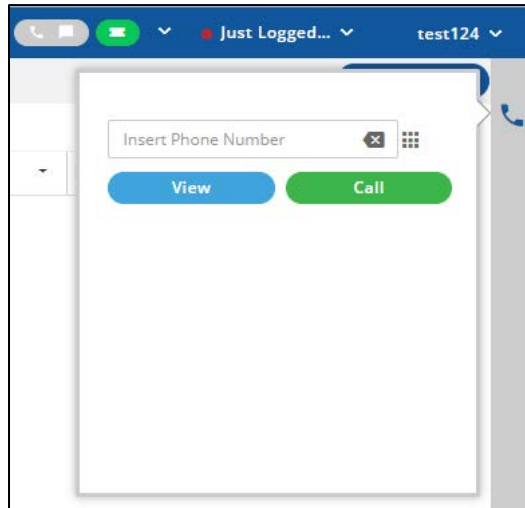


Figure: WebRTC Pop-up

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

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

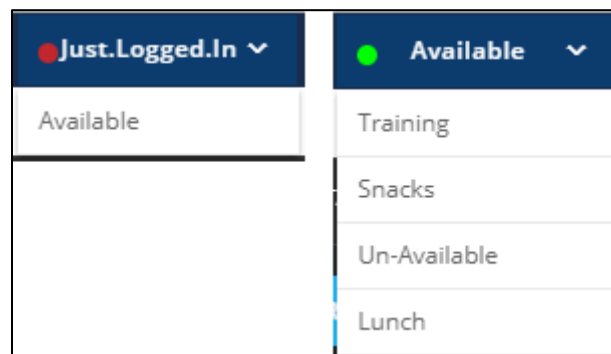


Figure: User Status Options

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

4. Supervisor can change its status at any time using the first drop-down menu on the top right corner.

5. The Administrator can modify to add more status options (such as Short Break, Team Meeting, and others) so there can be more options apart from the default ones that are already available.
6. Here, you will also notice the following campaign icons.
 - Voice Campaign Icon
 - Chat Campaign Icon
 - Interaction (Ticket) Campaign Icon
7. The supervisor can click the campaign icons to turn on or off the campaign mode.

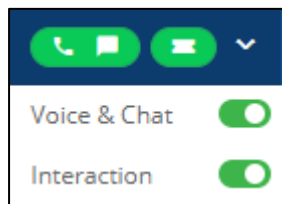


Figure: Turn on or off Auto-mode for Chat and Voice Campaigns

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

8. Click the toggle switch to turn on or off the auto-mode for chat and voice campaigns. After turning off, the campaign icon and its toggle switch are displayed in gray color. If the Administrator had configured that the supervisor and agents cannot set the Interaction Campaign to auto-off, then the toggle switch of Interaction Campaign is displayed in the blue color. The supervisor and agents will remain always available in the Interaction Campaign with this always-on toggle and cannot turn it off.

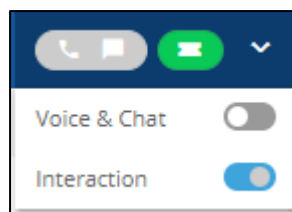


Figure: Force Auto-on for Interaction Campaign

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

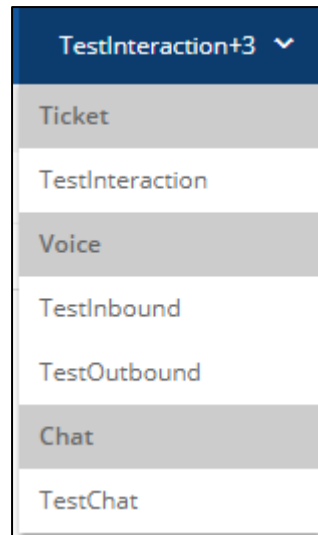



Figure: List of Campaigns

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

6.2 Ticket Creation in Workbench

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

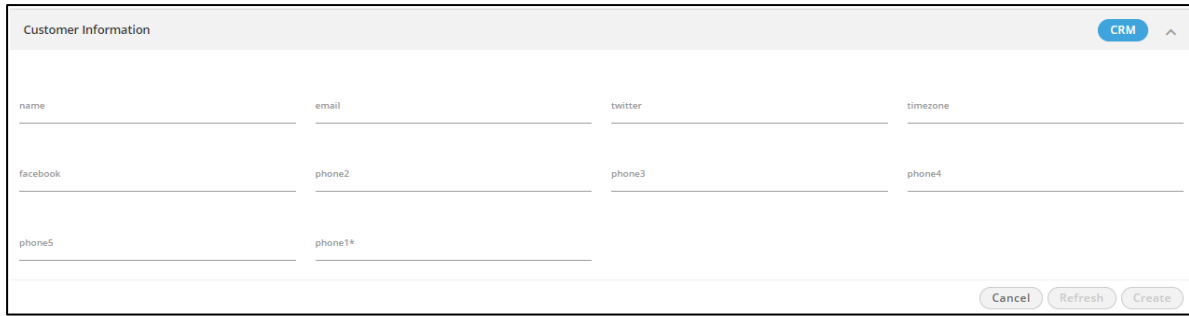
It is the default configuration of Ameyo that supervisor can logon to Chat Campaign only with an Interaction Campaign. So tickets will be created automatically in Chat and Interaction Campaign.

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.

6.2.1 Customer Information

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



Customer Information				CRM
name	email	twitter	timezone	
facebook	phone2	phone3	phone4	
phone5	phone1*			
				Cancel Refresh Create

Figure: Customer Information

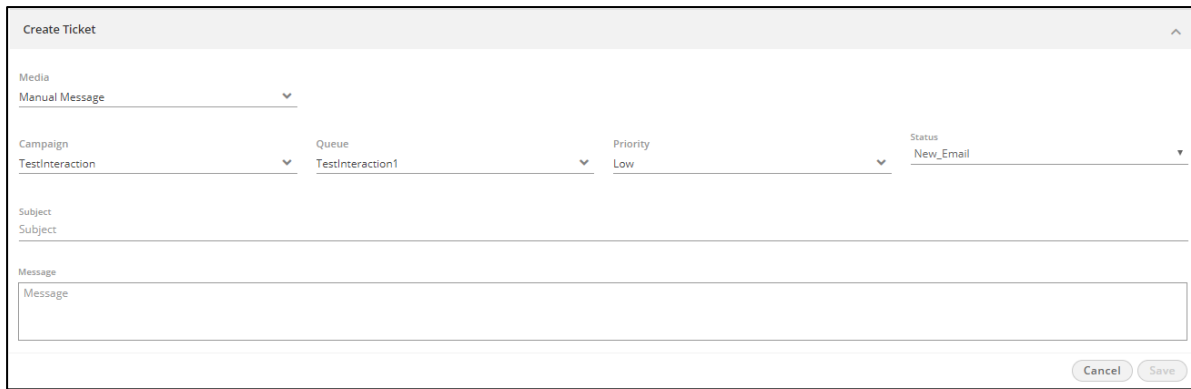
Provide the inputs for the following fields.

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.

6.2.2 New Ticket for Interaction Campaign

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



The screenshot shows a 'Create Ticket' form with the following fields and options:

- Media:** Manual Message
- Campaign:** TestInteraction
- Queue:** TestInteraction1
- Priority:** Low
- Status:** New_Email
- Subject:** Subject
- Message:** Message

Buttons: Cancel, Save

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.

6.3 Ticket Operations in Workbench

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.

6.3.1 Ticket Details

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

6.3.2 Escalate

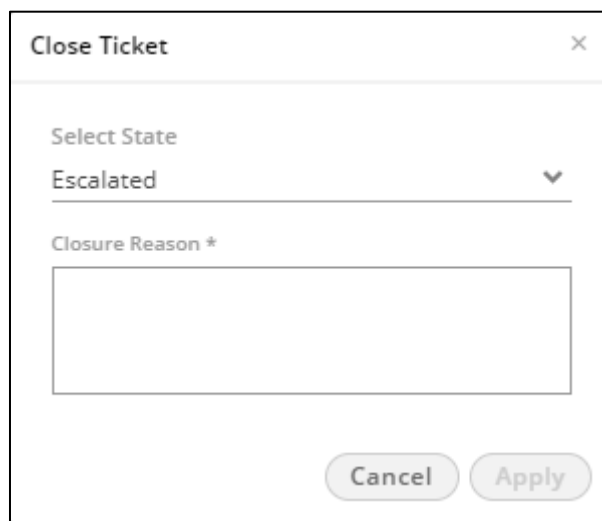
Click "Escalate" checkbox to escalate this ticket. The ticket will remain unassigned and is displayed with the red flag in the dashboard of the agents.

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

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

6.3.3 Close Ticket

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



The image shows a 'Close Ticket' modal window. At the top, it says 'Close Ticket' with a close button (X). Below that is a 'Select State' dropdown menu currently set to 'Escalated'. Underneath is a 'Closure Reason *' label followed by a large empty text input box. At the bottom right, there are two buttons: 'Cancel' and 'Apply'.

Figure: Close Ticket

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

6.3.4 Customer Information

Click "Customer Information" to view the customer information.



The image shows a 'Customer Information' interface. At the top, there's a '+Create New Customer' button, a search bar, and a 'CRM' button. Below this is a table for 'Customer3' with an 'Edit' button. The table has columns for name, email, twitter, and timezone. There are also rows for facebook and phone5.

Customer3			
name	email	twitter	timezone
Customer3	customer1@gmail.com	--	EST
facebook	phone2	phone3	phone4
--	--	--	--
phone5	phone1		
--	11111111		

Figure: Customer Information

Here, you can perform the following operations.

6.3.5 Edit


Click "Edit" to edit the customer information.

6.3.6 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.

6.3.7 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.

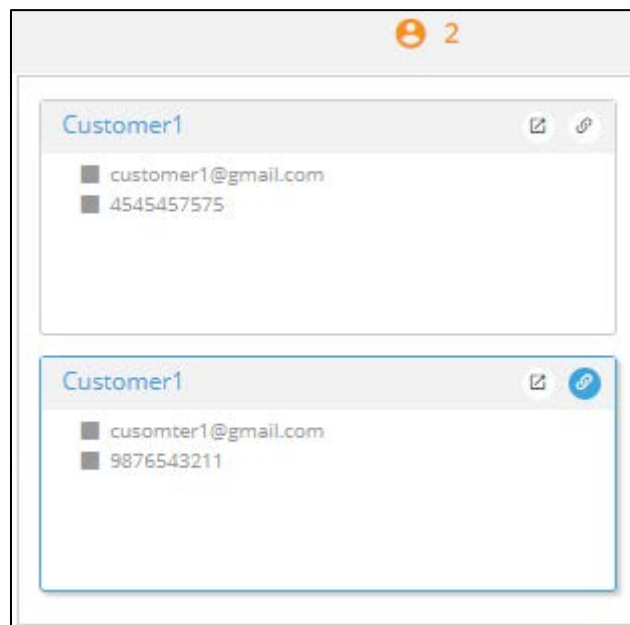




Figure: Customer Cards

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.

6.3.8 CRM

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

6.3.9 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.

6.3.10 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.

6.3.11 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".

6.3.12 Add Note

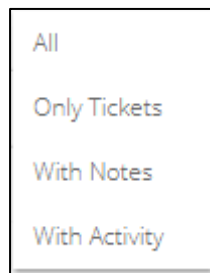
Click "Add Note" to add a public note to the ticket. It shows the following fields.

Figure: Add Note

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

6.3.13 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.

6.3.14 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.

6.4 Dashboard in Workbench

The Dashboard in Workbench shows all tickets created while interacting with the customers through any medium.

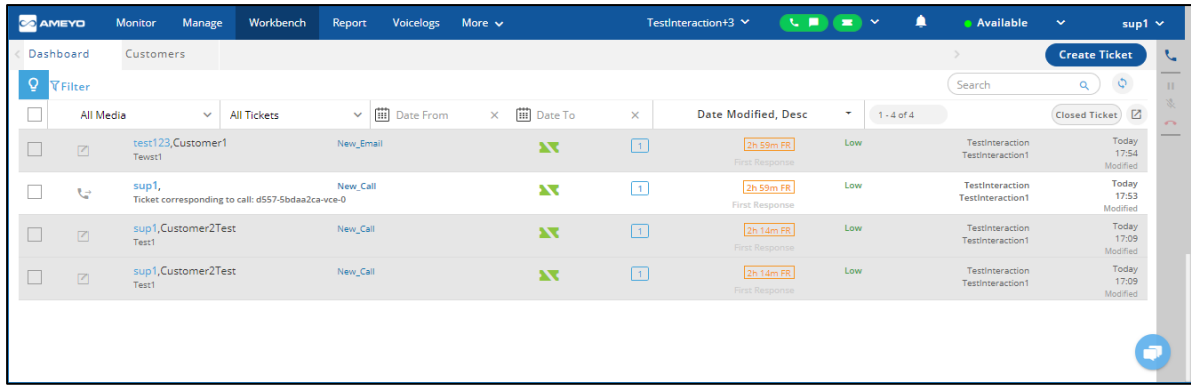



Figure: Dashboard


Here, the Supervisor can perform the following operations.

6.4.1 Smart Mode



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

6.4.2 Filter

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

Filter

Campaign	Queue	Priority
<input type="checkbox"/> TestInteraction	<input type="checkbox"/> TestInteraction1	<input type="checkbox"/> Low
		<input type="checkbox"/> Medium
		<input type="checkbox"/> High
State		
		<input type="checkbox"/> New_Twitter
		<input type="checkbox"/> Open_Assigned
		<input type="checkbox"/> New_WebChat
		<input type="checkbox"/> Open_Reopened
		<input type="checkbox"/> New_Email
		<input type="checkbox"/> New_Facebook
		<input type="checkbox"/> New_Call
		<input type="checkbox"/> New_Chat
		<input type="checkbox"/> Pending_Customer_Have_to_do
		<input type="checkbox"/> Open_Unassigned
		<input type="checkbox"/> New_WhatsApp

Advance Filter


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.

6.4.3 Search Tickets

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

6.4.4 Refresh

Click  icon to refresh the view of the dashboard.

6.4.5 Row Filter

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



Figure: Filter Row

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

6.4.6 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.

6.4.7 View Closed Tickets

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

6.4.8 Export List of Tickets to a CSV

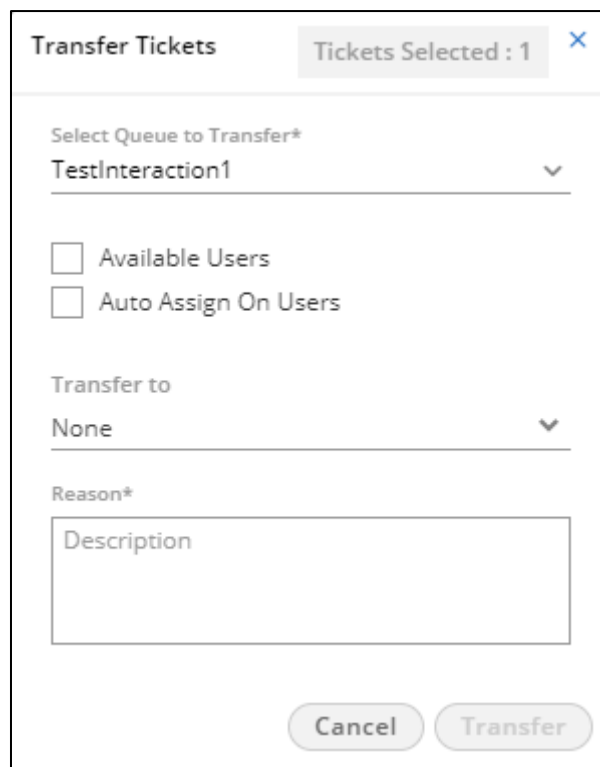
Click  icon to export the list of all or selected tickets to a CSV file, which will be saved on the disk.

6.4.9 Pick

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

6.4.10 Transfer

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



The image shows a "Transfer Tickets" pop-up dialog box. At the top right, it says "Tickets Selected : 1" with a close button (X). The dialog contains the following fields and options:

- "Select Queue to Transfer*" dropdown menu with "TestInteraction1" selected.
- Two checkboxes: "Available Users" and "Auto Assign On Users", both currently unchecked.
- "Transfer to" dropdown menu with "None" selected.
- "Reason*" text input field with "Description" as a placeholder.
- At the bottom, there are two buttons: "Cancel" and "Transfer".

Figure: Pop-up to transfer the ticket.

Here, perform the following steps to transfer a ticket.

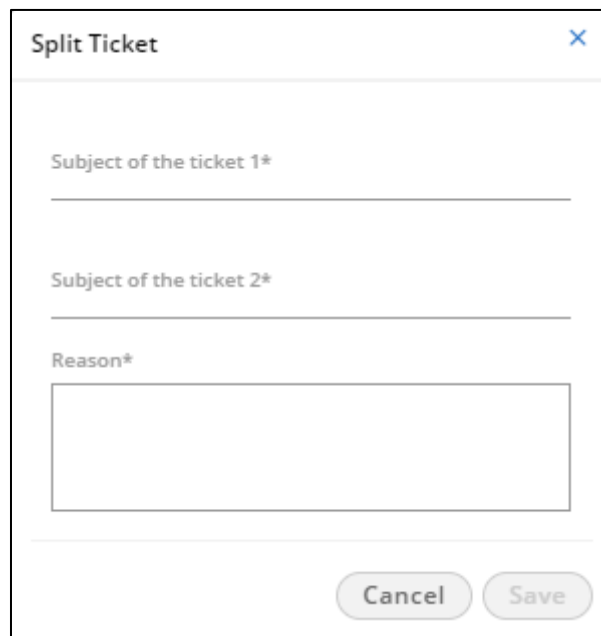
1. Select the queue to which you want to transfer the ticket.
2. Select "Available Users" if you want to transfer the ticket to the available users. Once checked, "Transfer to" drop-down menu will list only those users who are available or who have sufficient bandwidth to take the ticket.
3. Select "Auto 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.

6.4.10.1 Split Ticket

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



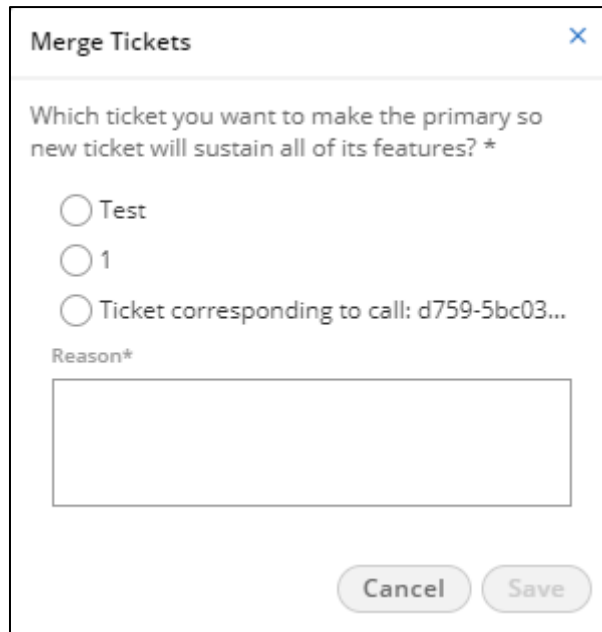
The image shows a 'Split Ticket' dialog box. It has a title bar with the text 'Split Ticket' and a close button (X). Below the title bar, there are three input fields: 'Subject of the ticket 1*', 'Subject of the ticket 2*', and 'Reason*'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Save'.

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.

6.4.10.2 Merge Ticket

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



Merge Tickets [X]

Which ticket you want to make the primary so new ticket will sustain all of its features? *

Test
 1
 Ticket corresponding to call: d759-5bc03...

Reason*

Figure: Merge Multiple Tickets to One

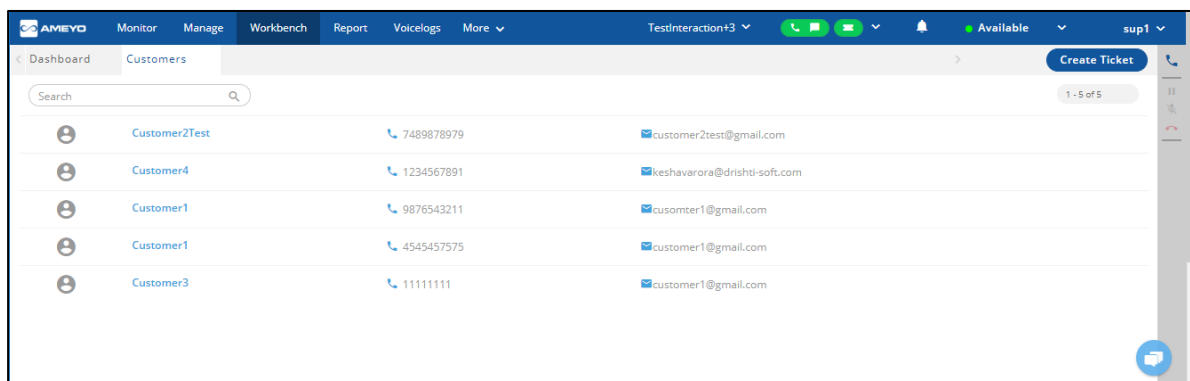
Select the primary ticket into which other tickets will be merged. Provide a reason to merge the tickets. Click "Save" to merge the tickets.

6.4.11 Unassign Ticket

Supervisor can select the tickets and click "Unassign" to unassign the tickets.

6.5 Customer Tab in Workbench

Customer Tab in the Workbench shows the list of customers.



Customer Name	Phone Number	Email Address
Customer2Test	7489878979	customer2test@gmail.com
Customer4	1234567891	keshavarora@drishti-soft.com
Customer1	9876543211	cusomter1@gmail.com
Customer1	4545457575	customer1@gmail.com
Customer3	11111111	customer1@gmail.com

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.

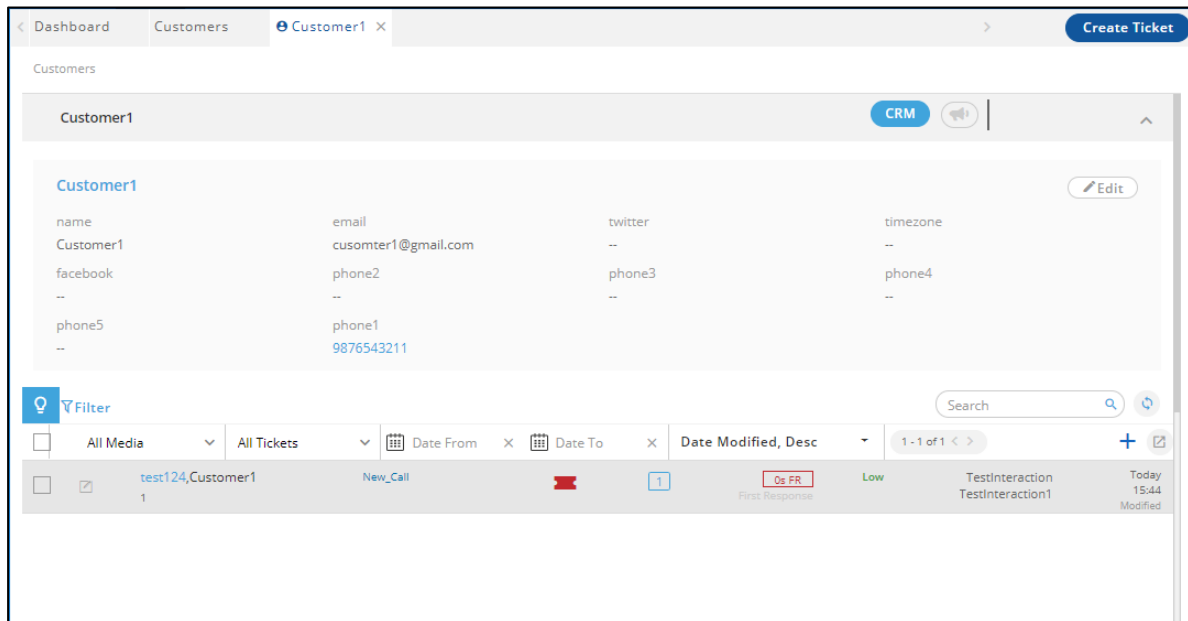


Figure: Customer Information

Customer Information is displayed on the top. The Supervisor 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 Supervisor can click any ticket to open its details in a new tab. The Supervisor can also click "+" to create a new ticket for the customer.

6.6 Customer Communications in Workbench

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

- [Email](#)
- [Chat](#)
- [Voice](#)

6.6.1 Email Customer Communication in Workbench

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

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

6.6.2 Chat Customer Communication in Workbench

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 platforms. 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 Supervisor and agents 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.

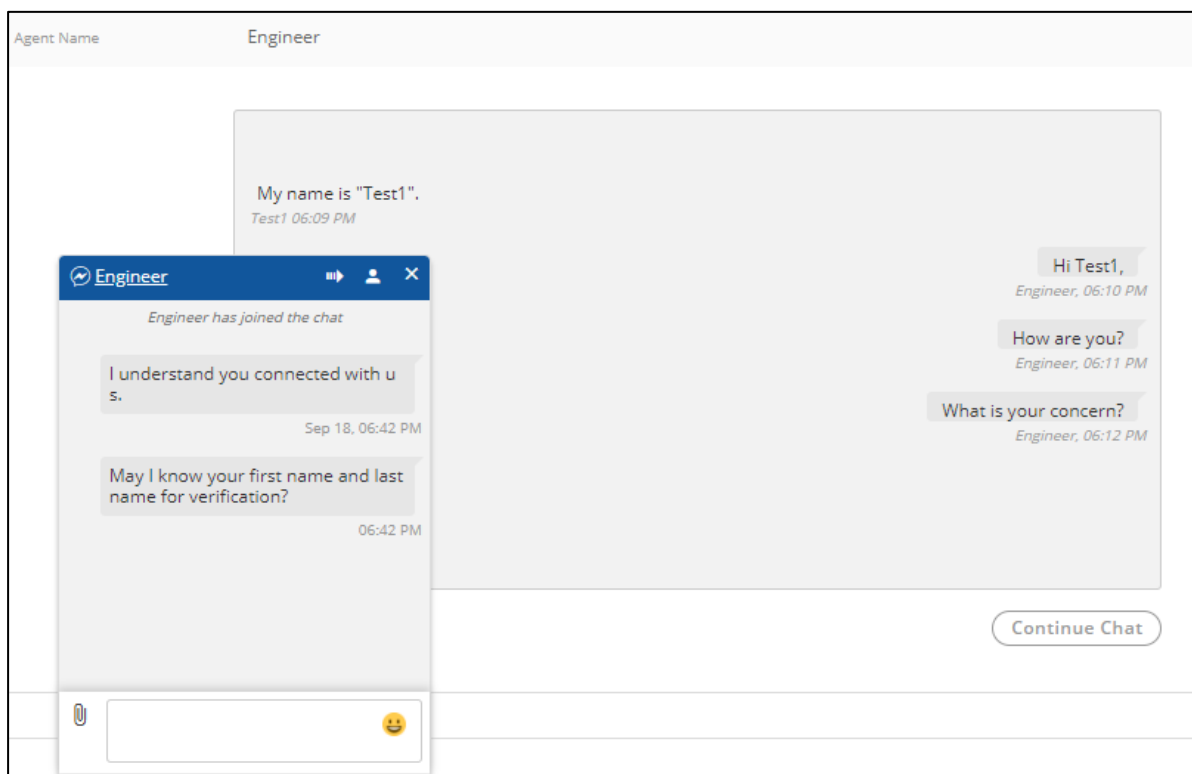


Figure: New Ticket through Chat

The Supervisor 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.

6.6.3 Displaying Name of User to the Customer

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

6.6.4 Customer Name is Clickable

Name of the registered customer is clickable in the chat window. The supervisor 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.

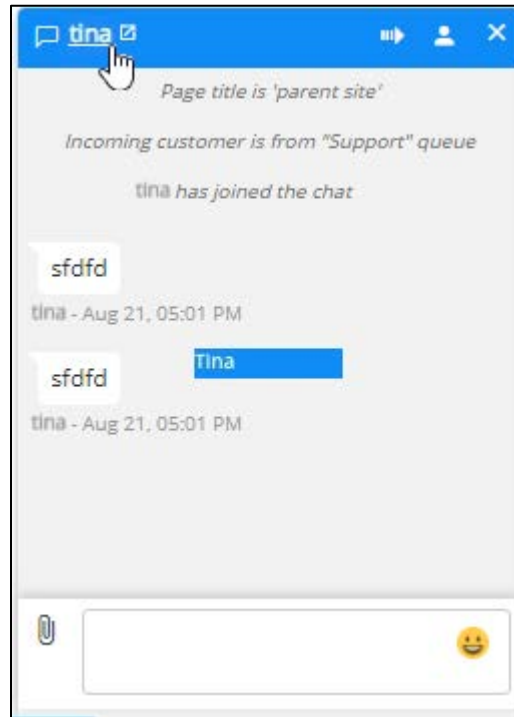


Figure: Customer Name is clickable

6.6.5 Voice Communication in Workbench

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](#)

6.6.5.1 Inbound Call in Workbench

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

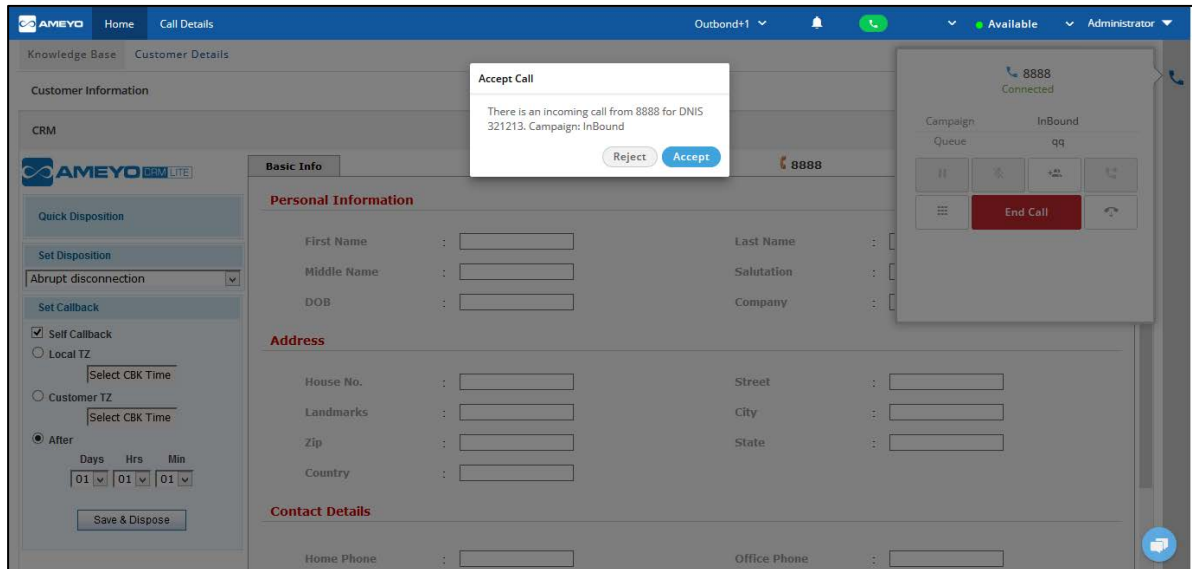


Figure: Call Notification

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

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

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

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

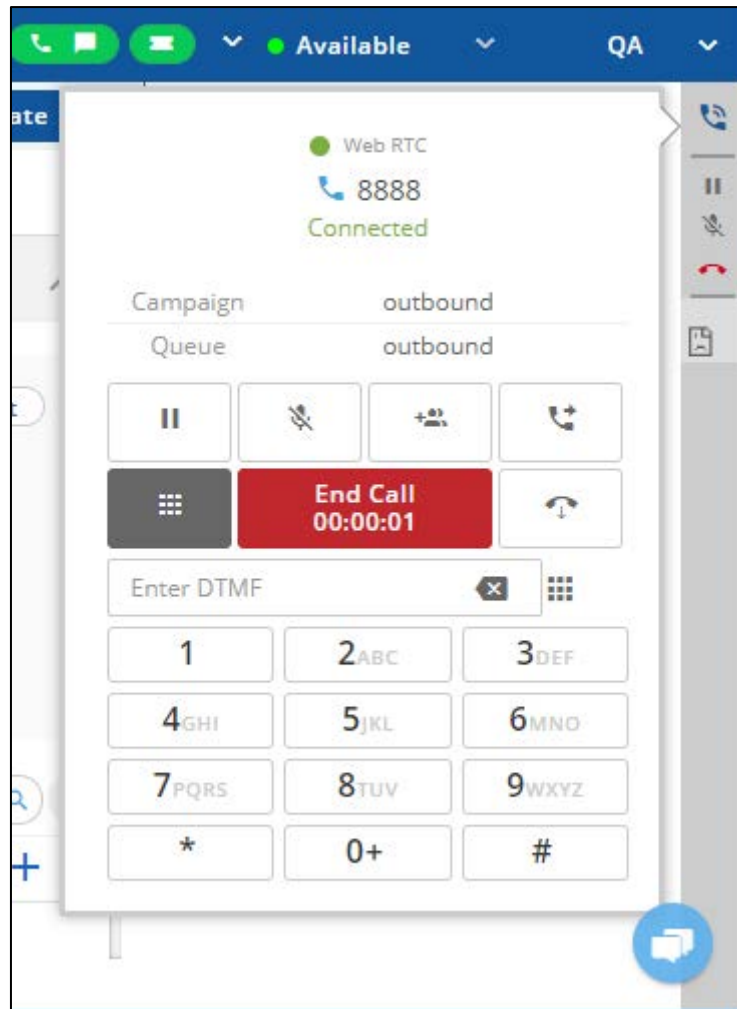


Figure: Agent Communicating with the Customer on Incoming Call

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

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

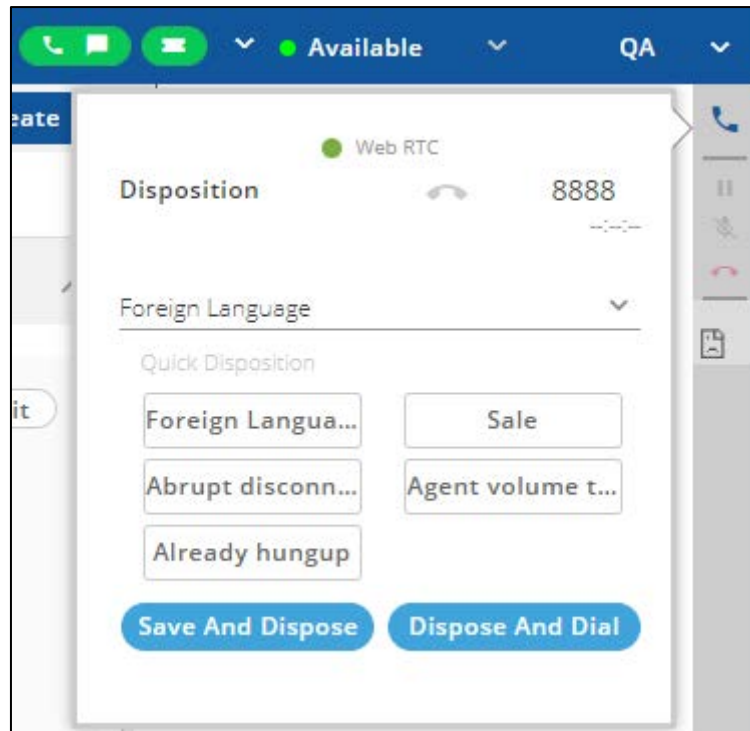


Figure: Dispositions for an Incoming Call

The Supervisor 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 Supervisor 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 Supervisor can type the number to be dialed.

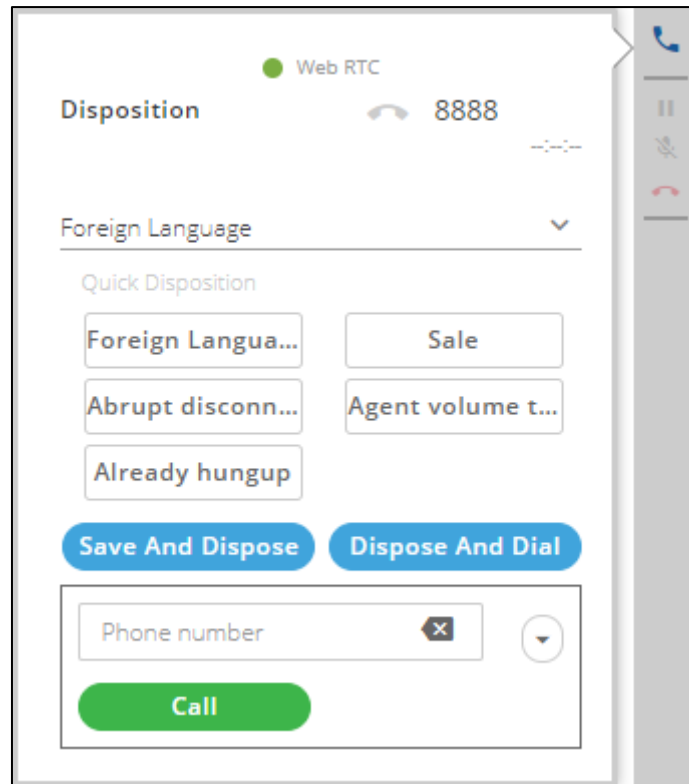


Figure: Dispose and Dial

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.

6.6.5.2 Outbound Call in Workbench

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](#)

6.6.5.2.1 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.

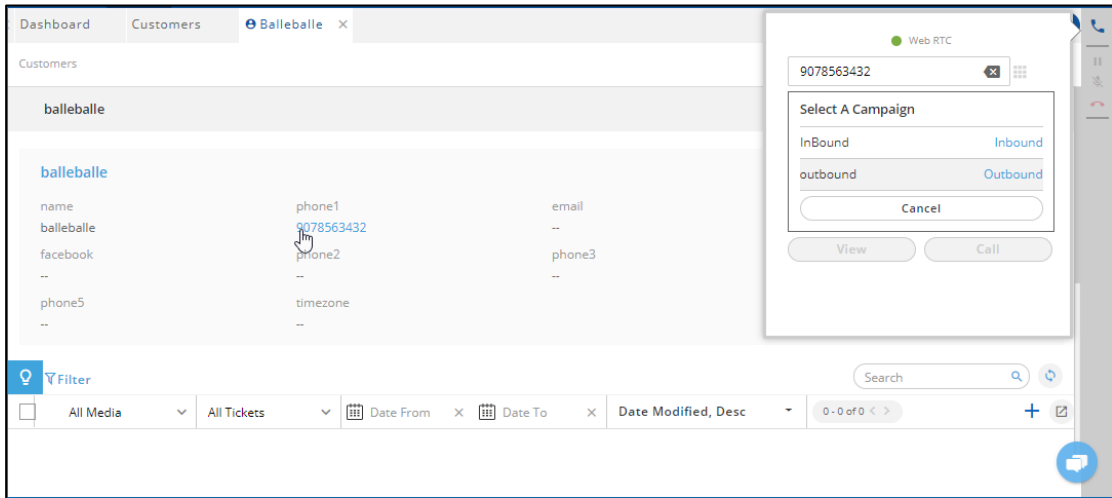


Figure: Calling a Customer through Customer Information

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

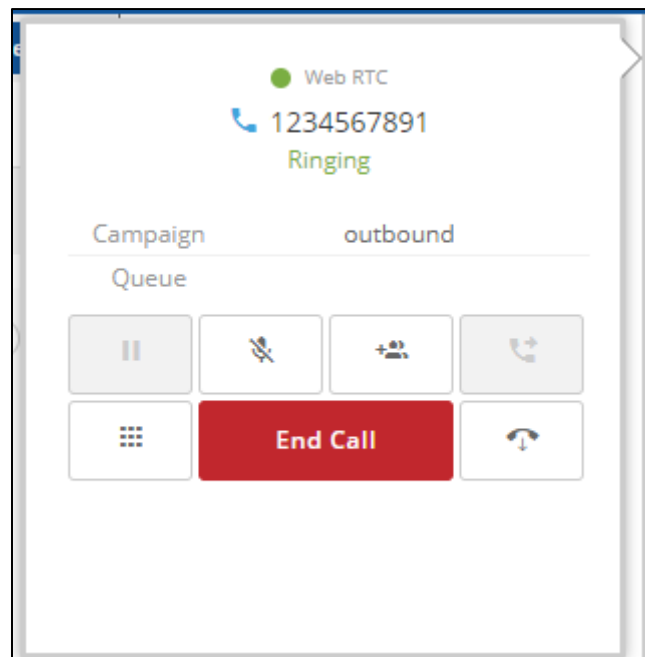
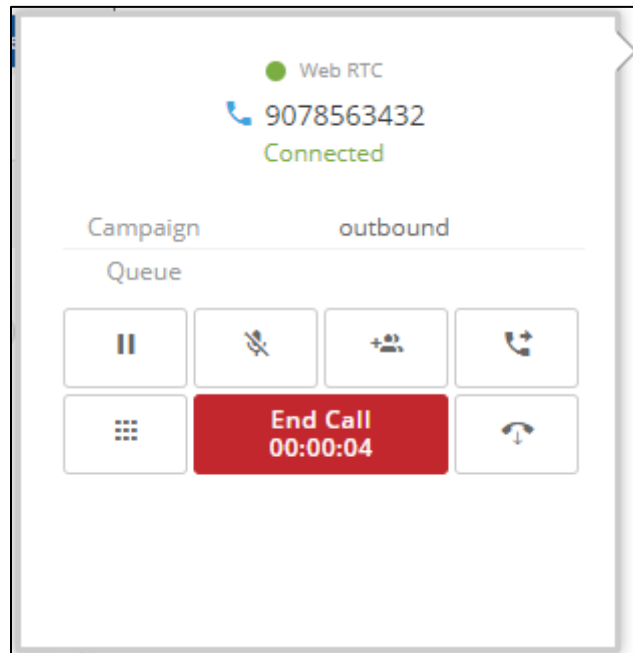


Figure: Calling a Customer

4. Once the customer answers the call, the Supervisor 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 Supervisor 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.

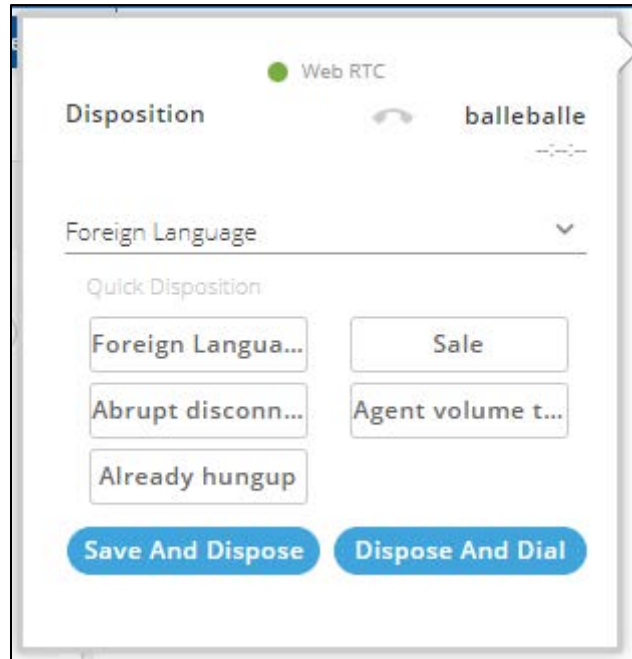


Figure: Dispositions of an Outbound Call

7. The Supervisor 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.

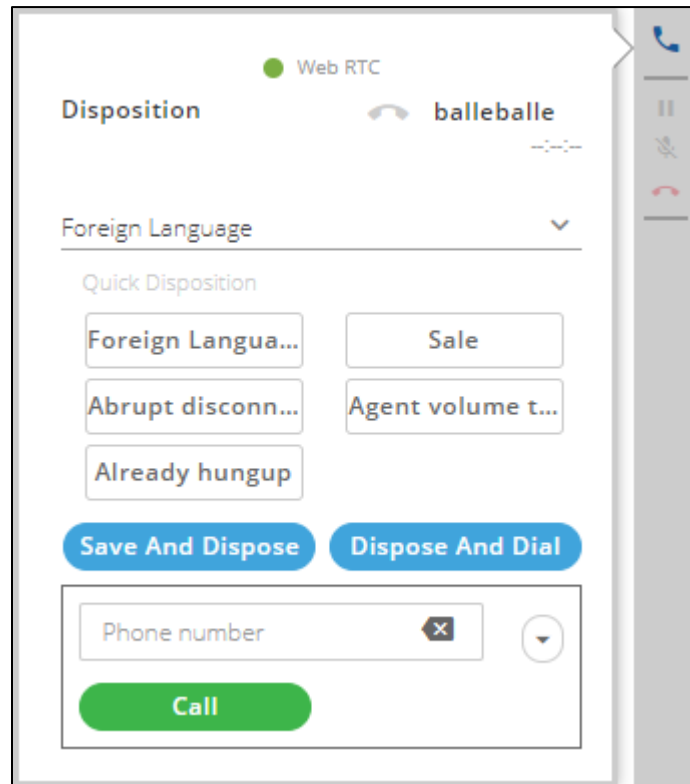



Figure: Continue to Manual Dial after Disposing Current Call

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.

6.6.5.2.2 Make a Manual Dial Outbound Call in Workbench

Perform the following steps to make a manual dial call.

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

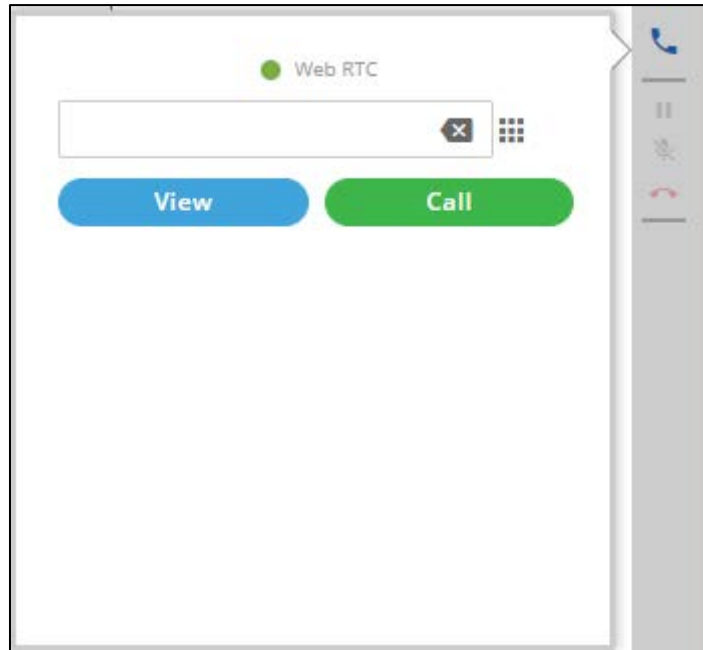



Figure: Manual Dial

2. Click  icon to show the numeric keypad.

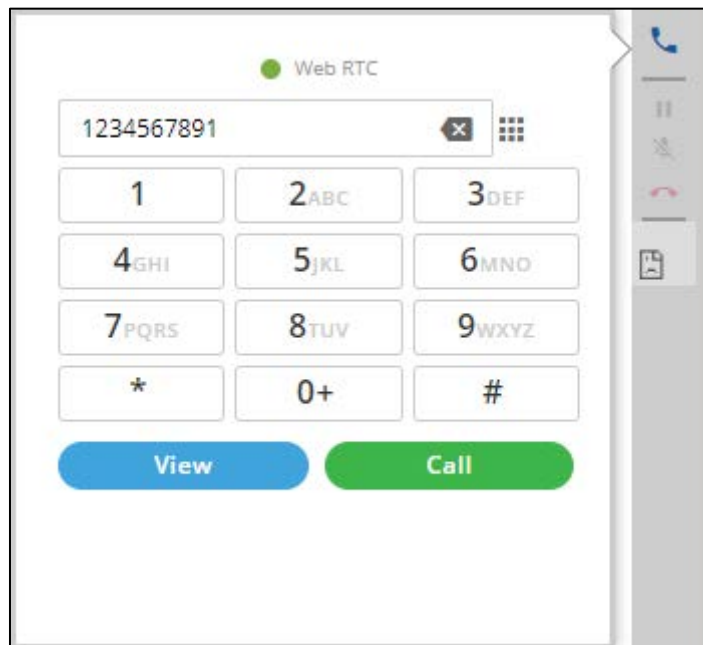


Figure: Numeric Keypad

3. The Supervisor can either type the number through keyboard or this numeric keypad to punch the number.
4. After entering the number, the Supervisor can click "Call" button to dial it.

5. In case of multiple campaigns, the WebRTC dialer lists them and the Supervisor has to select a campaign.

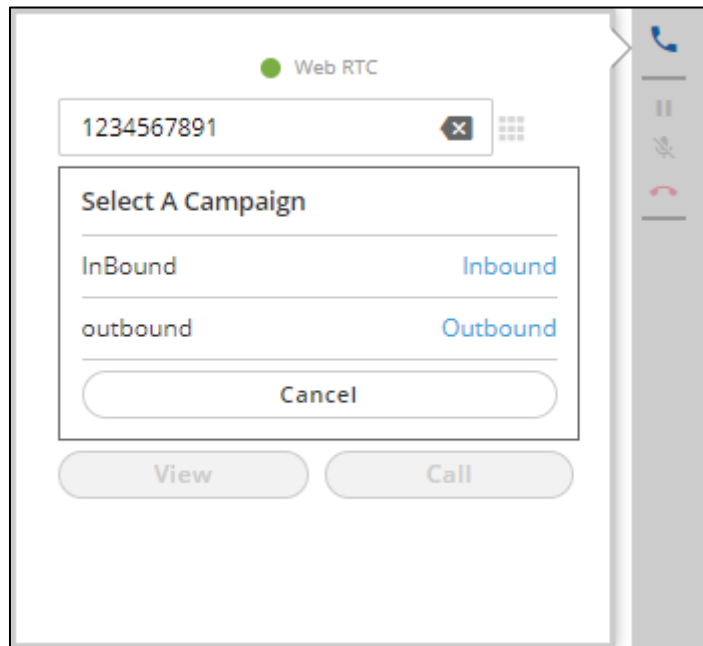


Figure: Campaign Selection

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.

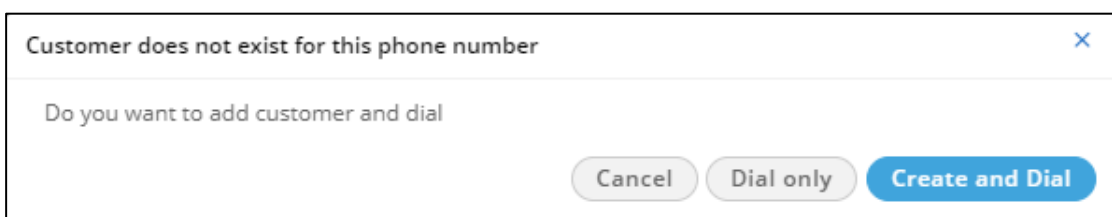


Figure: Calling Manually to a New Number

It contains the following two options.

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

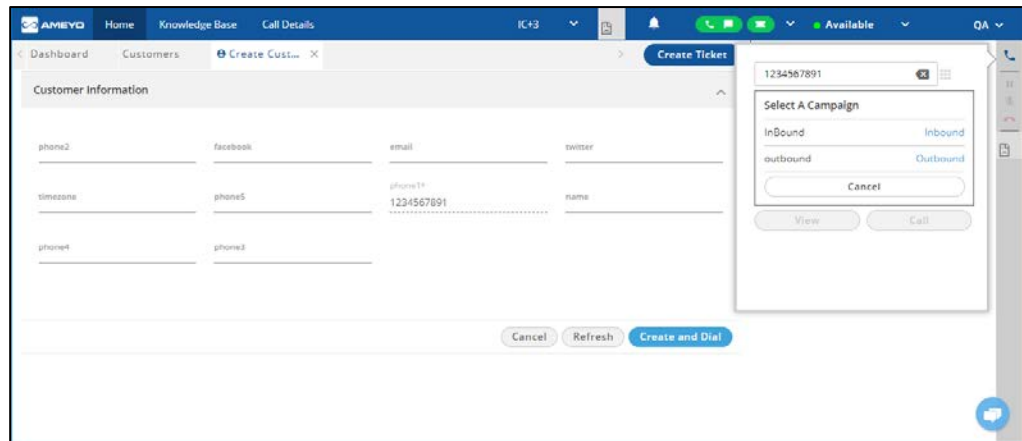


Figure: Create and Dial

Here, you have to provide the following inputs.

- Name
- Phone 2
- Phone 3
- Phone 4
- Phone 5
- Timezone
- Twitter
- Facebook
- Email

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

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

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

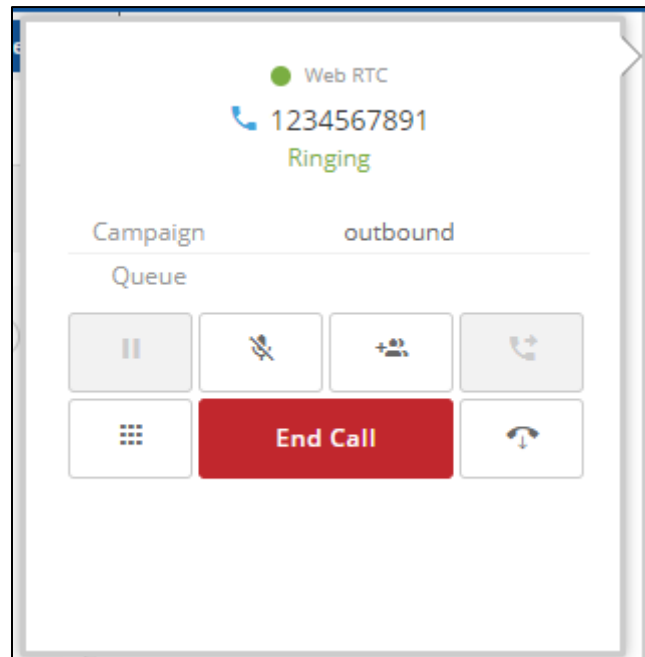


Figure: Calling a Customer

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

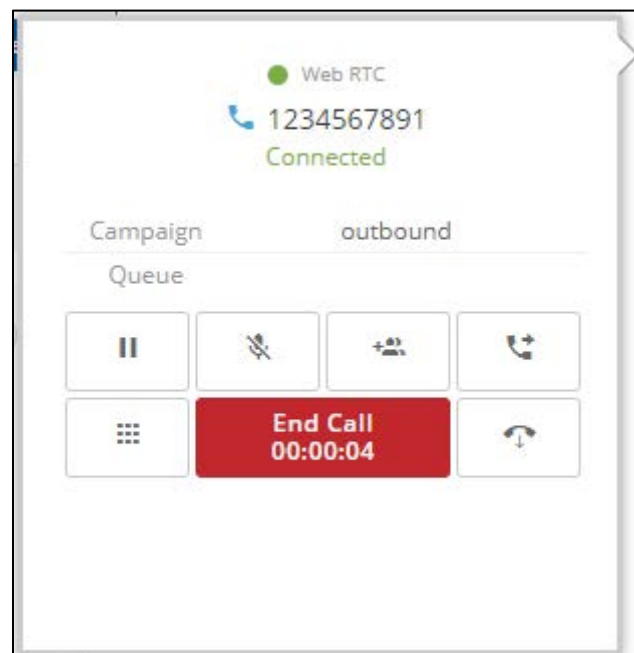


Figure: Ongoing Outbound Call

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

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

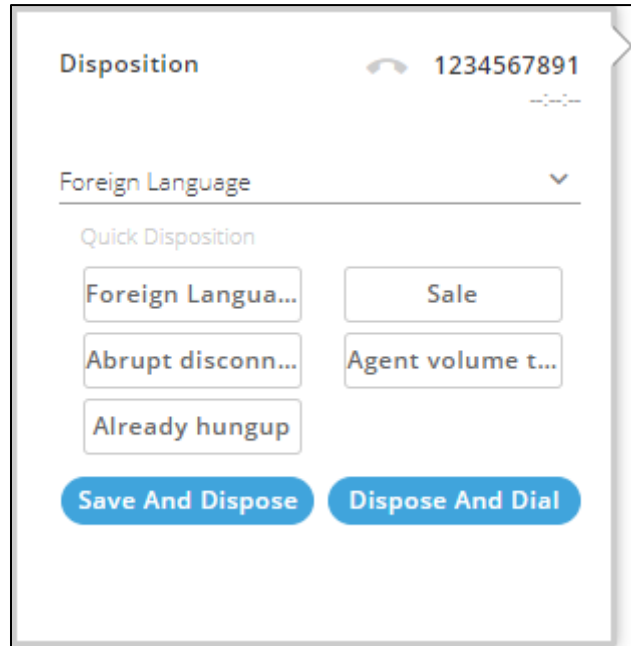


Figure: Dispositions of an Outbound Call

11. The Supervisor 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 dialing a new customer without using "Create and Dial" option as you get the option to create the customer while disposing the ticket.

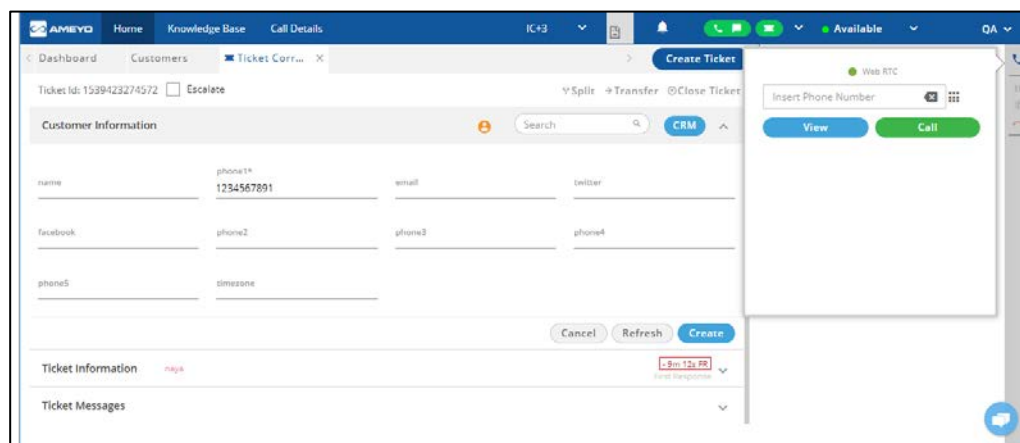


Figure: Create Customer and Dispose Ticket

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 dialing a new customer with "Dial Only" option as this option will not let you create the new 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.

6.6.5.2.3 Preview Manual Dialing in Workbench

Preview Manual Dialing enables the Supervisor and the agents to first view the available information about the customer and provides a timeframe before dialing the customer. In this timeframe, the Supervisor 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.

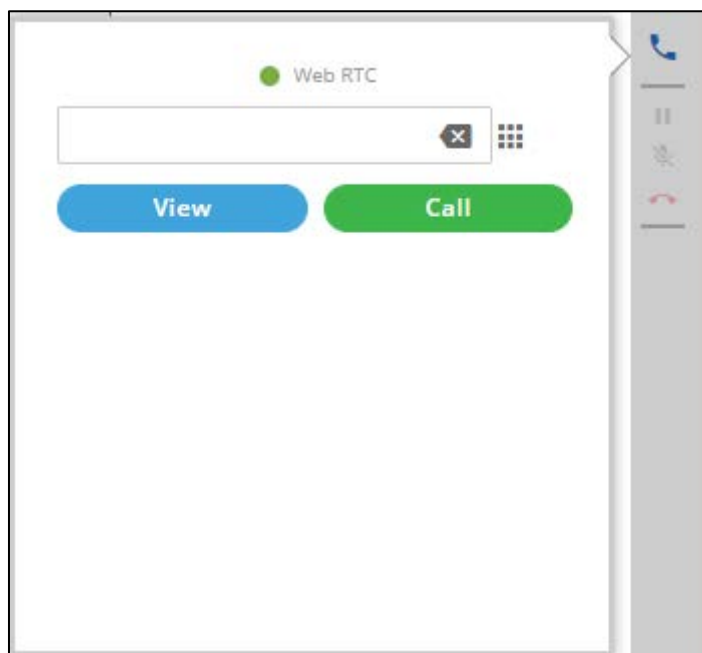



Figure: Manual Dial

2. Click  icon to show the numeric keypad.

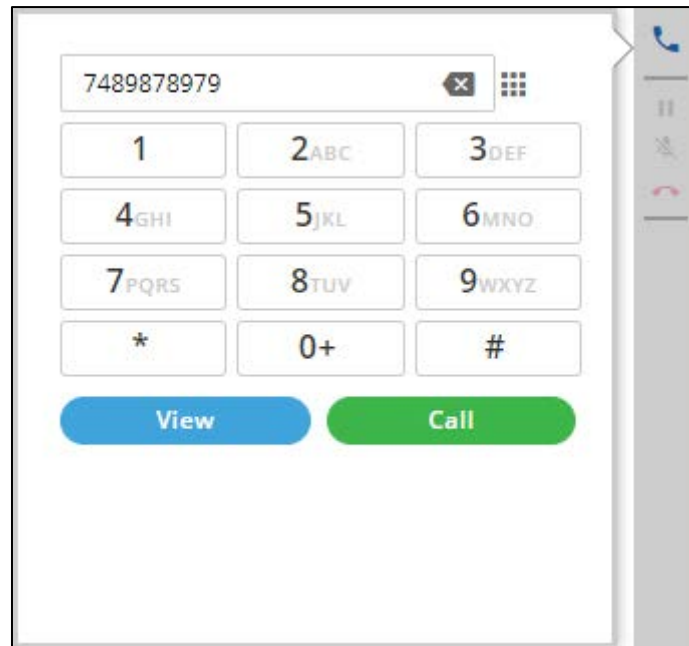


Figure: Numeric Keypad

3. The Supervisor 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 Supervisor has to select a campaign.

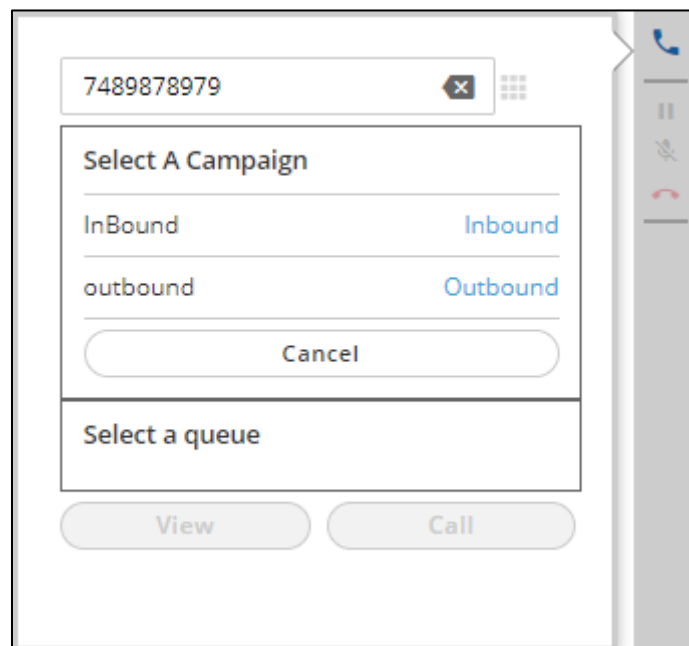


Figure: Campaign Selection

Here, we are using a different new number.

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

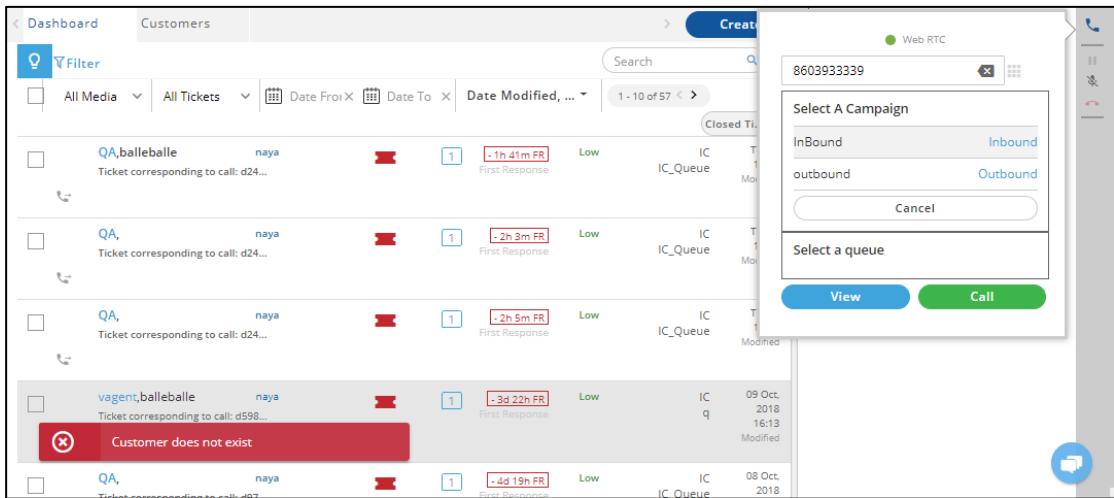


Figure: Customer Does not Exist

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.

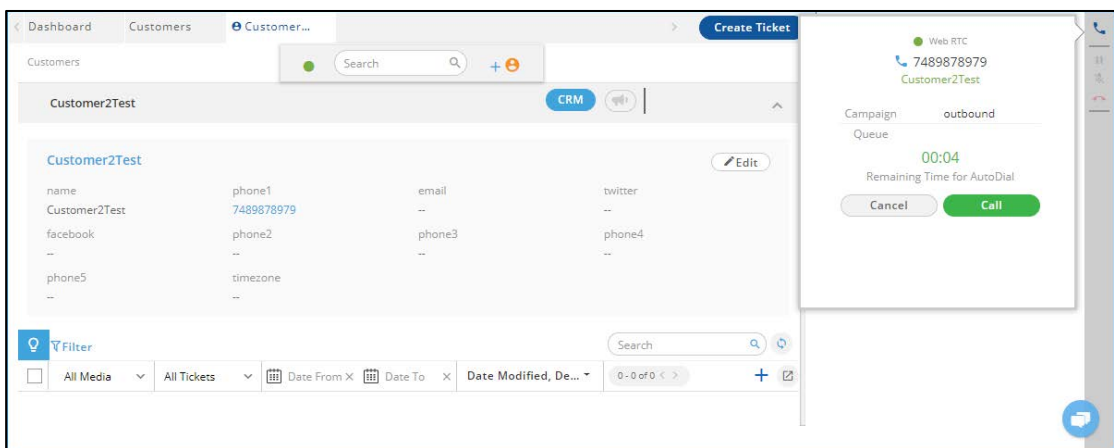


Figure: Showing the Customer

8. The Supervisor 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.

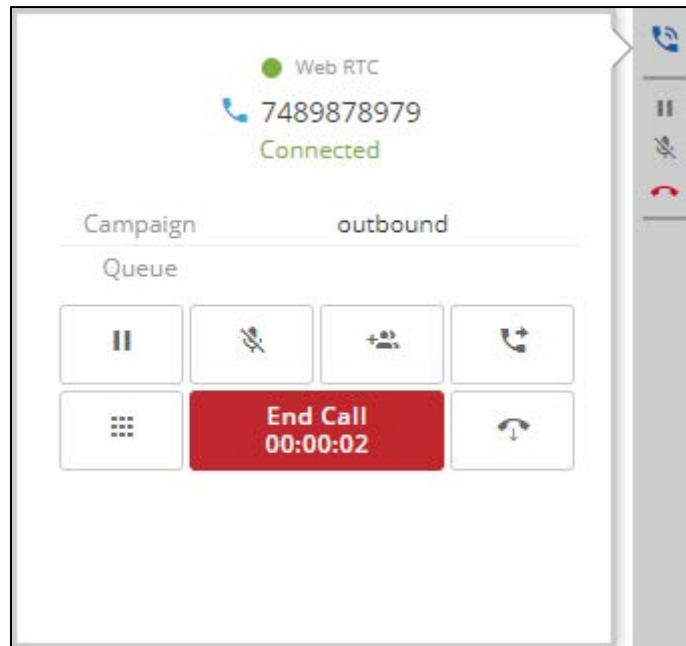


Figure: Calling a Customer

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

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

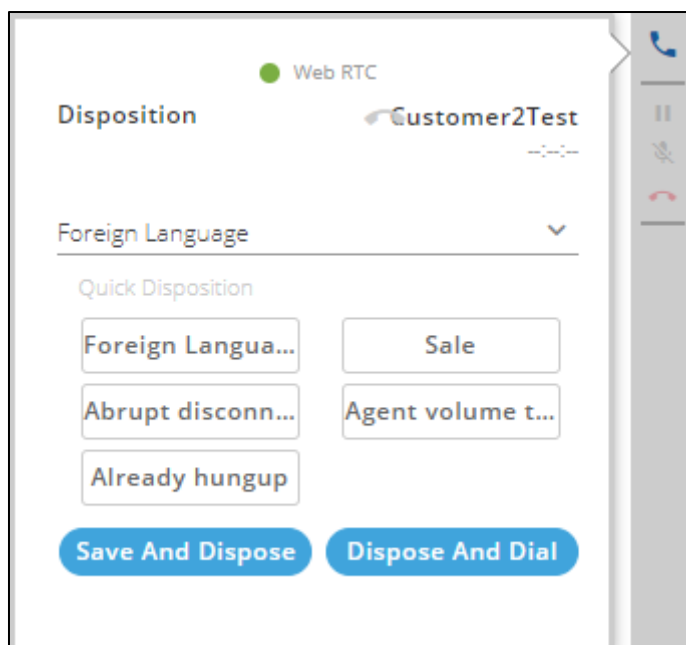


Figure: Dispositions of a Manual Preview Outbound Call

10. The Supervisor 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.

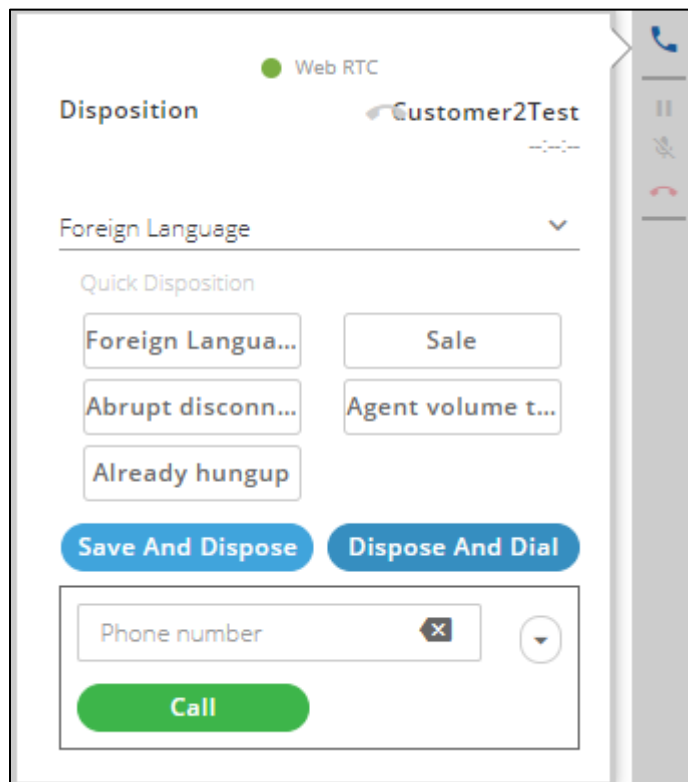


Figure: Continue to Manual Dial after Disposing Current Call

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

6.6.5.2.4 Auto-Dial Outbound Call in Workbench

In case of Auto Dial, the dialer throws the call to the users including Supervisor. The Supervisor is asked to accept or reject the call.

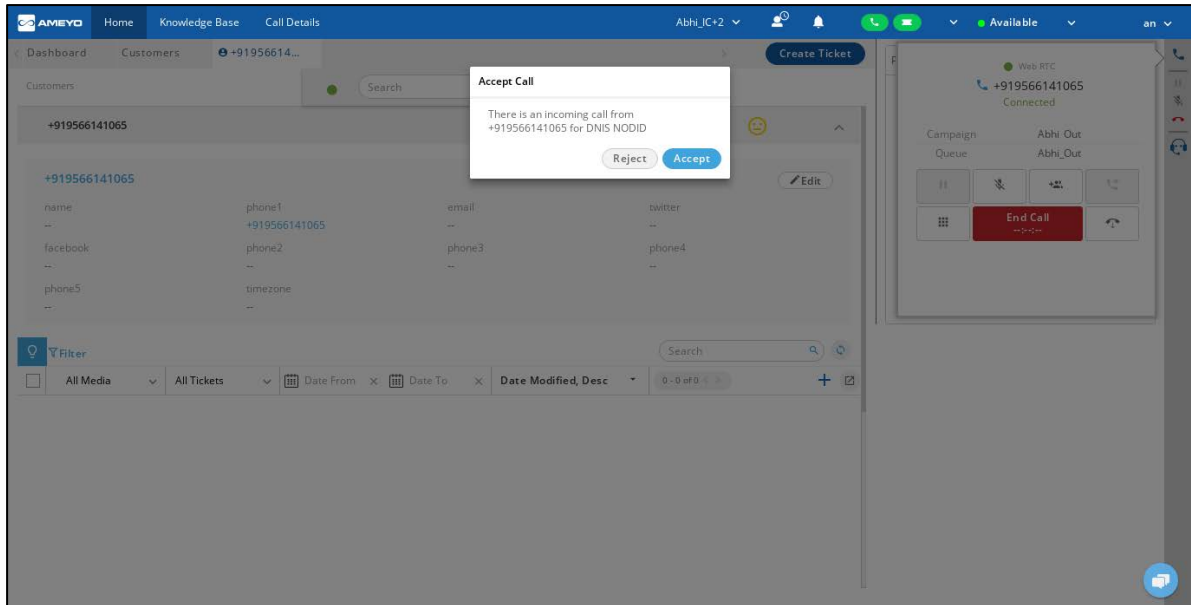


Figure: Outbound Call Sent by the Dialer.

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

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

The Supervisor has to perform the following steps here.

1. Click "Accept" to attend the call.

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

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

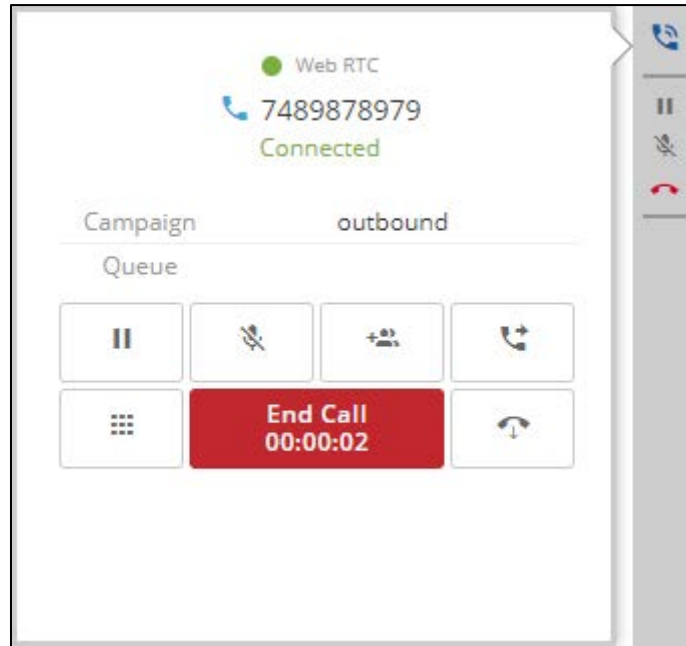


Figure: Calling a Customer

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

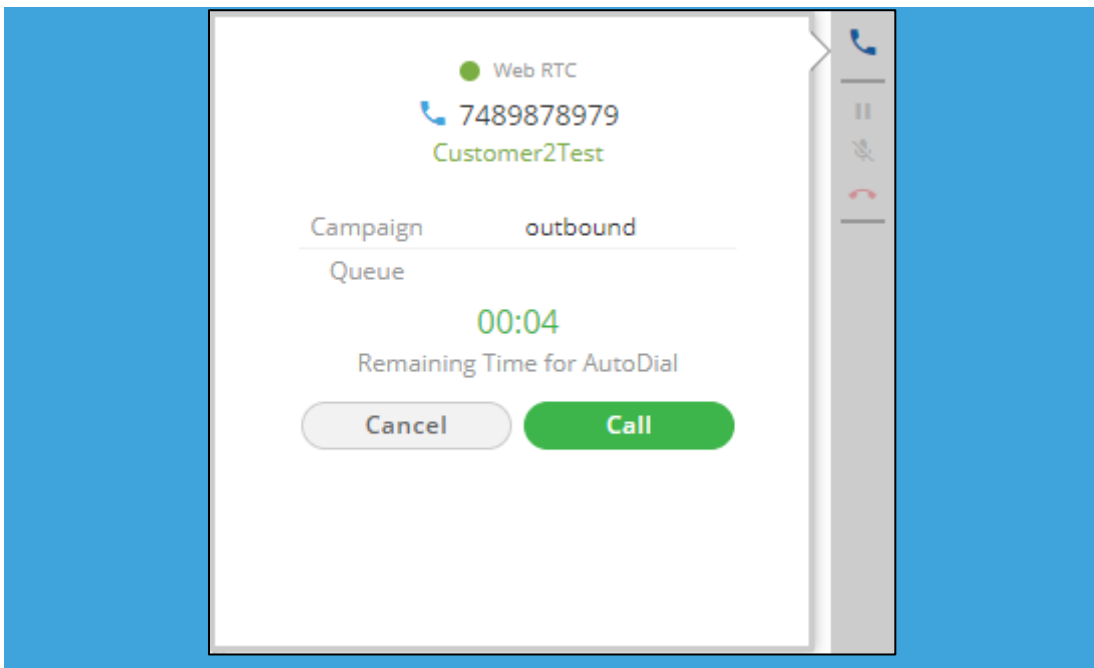


Figure: Preview Time

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.

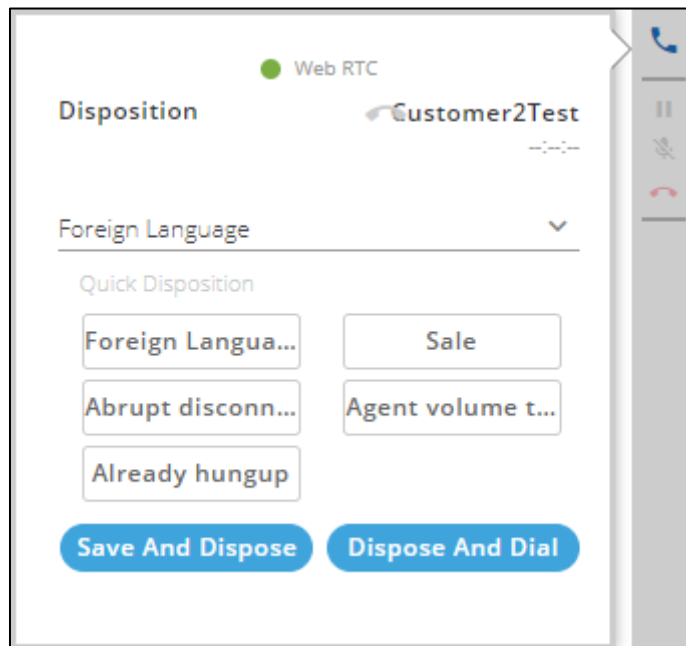


Figure: Dispositions of a Manual Preview Outbound Call

4. The Supervisor 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.

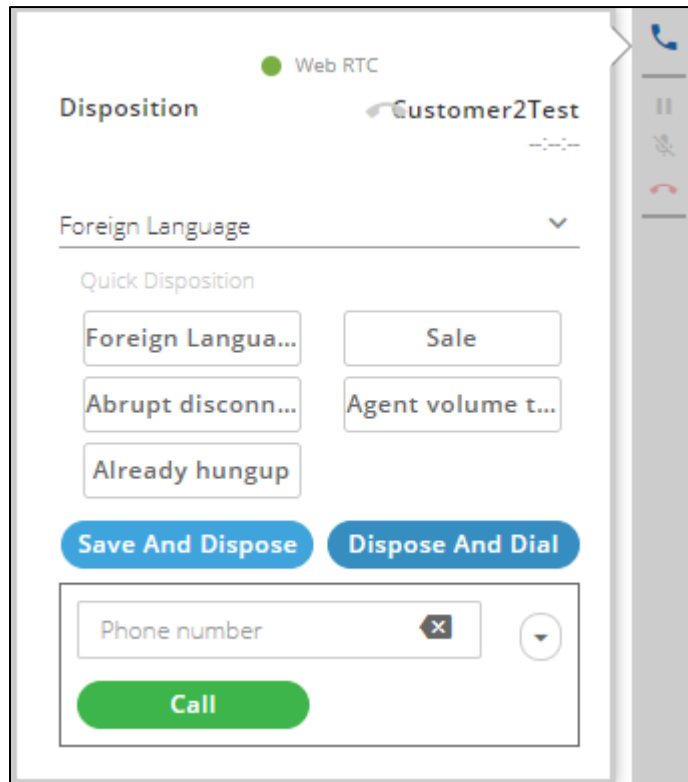


Figure: Continue to Manual Dial after Disposing Current Call

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

6.6.5.3 Call Control Functions

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

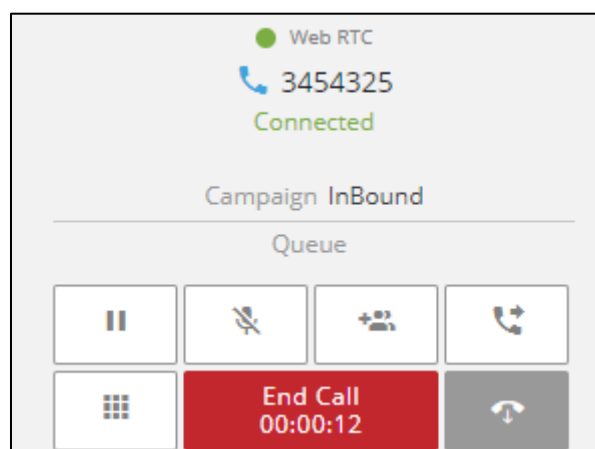




Figure: Call Screen

6.6.5.3.1 Call Hold/Talk

While on live calls, the Supervisor 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 Supervisor can unhold(resume) the call by clicking  button.

6.6.5.3.2 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.

6.6.5.3.2.1 Confer a Call to a User or Supervisor

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

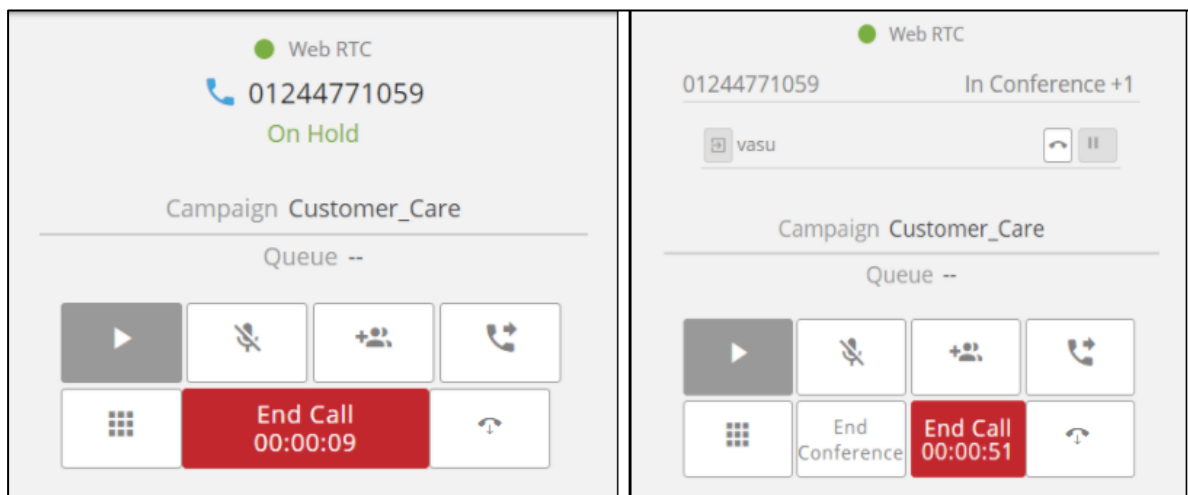





Figure: Call Conferencing

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. Supervisor 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. Supervisor can unhold the customer by clicking "**UNHOLD**" button and it will be a three-way conference call with new agent and the caller.

5. The Supervisor can disconnect conference call by clicking "**End Conference**" button.
6. The Supervisor can give the ownership to the other user while on the conference call by clicking  button. The primary user (here Supervisor) 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.

6.6.5.3.2.2 Confer a Call to an External Number

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

1. Supervisor will put the customer call on hold by clicking "**HOLD**" button and click "**CONFER**" button.
2. Enter the phone number to transfer the call to in the box labeled "**PHONE**". After entering the phone number, click "**Confer To Phone**" button.
3. Once the call gets connected, Supervisor can explain the use case to the new user. During this process, customer call is on hold.
4. Supervisor can unhold the customer by clicking "**UNHOLD**" button and it will be a three-way conference call with new user and the caller.
5. The Supervisor can disconnect conference call by clicking "**End Conference**" button.
6. The Supervisor can remove the added user from the conference call by clicking  button.

6.6.5.3.2.3 Confer a call to Verifier

The Supervisor 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 drop down list.

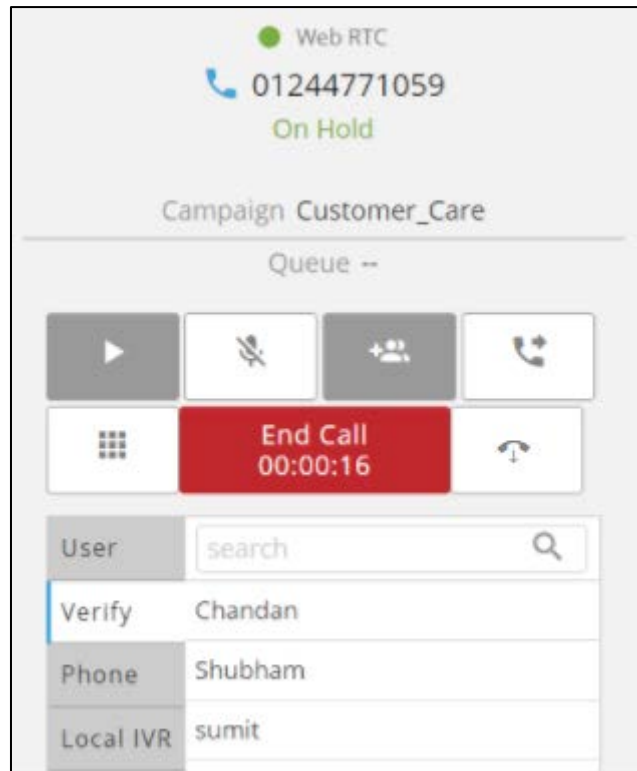


Figure: Call Conferencing to Verifier

1. Supervisor put the customer call on hold by clicking "**HOLD**" button and click "**CONFER**" button.
2. Supervisor 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. Supervisor can unhold the customer by clicking "**UNHOLD**" button and it will be a three-way conference call with verifier and the caller.
5. The Supervisor can disconnect conference call by clicking "**End Conference**" button.

6.6.5.3.2.4 Confer a Call to IVR

If Supervisor 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. Supervisor will put the customer call on hold by clicking "**HOLD**" button and click "**CONFER**" button.
2. Supervisor needs to select the local IVR from the drop-down menu and click "**Confer with local IVR**" button.

3. Both customer and Supervisor 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 Supervisor instruction or IVR prompts.

6.6.5.3.3 Call Transfer

If an Supervisor wants to transfer a call, then he/she needs to click on the (TRANSFER) button. The Supervisor 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

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

A warm transfer is when Supervisor will transfer the customer call to another Supervisor 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. Supervisor will put the customer call on hold by clicking on "HOLD" button and then click on "TRANSFER" button.
3. Supervisor can choose anyone of the user from the available list. Once call is connected to new user, Supervisor can give the customer details (required information) to the new user. During this process, customer call is on hold.
4. New user will unhold the call by clicking on the "UNHOLD" button and it will be a three-way conference call with new user, the caller and Supervisor himself.
5. Supervisor 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.

6.6.5.3.3.2 Transfer a call to external number(Warm Transfer)

A warm transfer is when Supervisor 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:

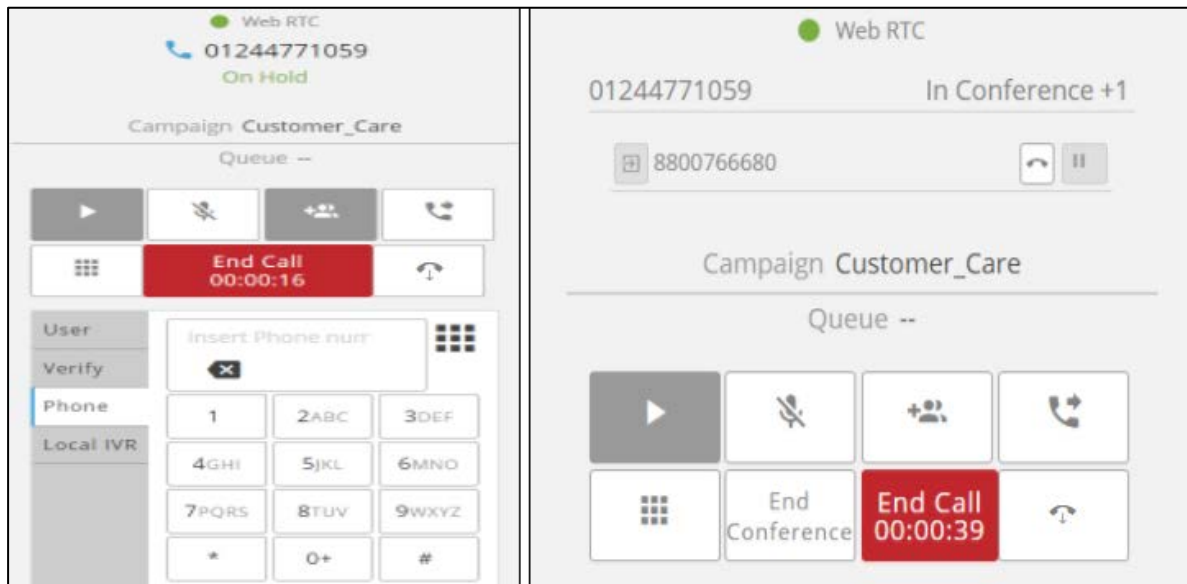




Figure: Call Transfer to External

1. Supervisor will put the customer call on hold by clicking on "HOLD" button and then click on "CONFER" button.
2. Enter the phone number to transfer the call to in the box labeled "PHONE". After entering the phone number, click the "Confer To Phone" button.
3. Once the call gets connected, Supervisor can explain the use case to the external party. During this process, customer call is on hold.
4. External party will unhold the call by clicking on the "UNHOLD" button and now there will be a three-way conference call with new user, the caller and Supervisor itself.
5. The Supervisor can give the ownership to the external party while on the conference call by clicking  button. The primary Supervisor can come out of the call by disposing the call.
6. The primary Supervisor can remove the external party from the conference call by clicking on  button.

6.6.5.3.3 Transfer a Call to IVR

If Supervisor 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.

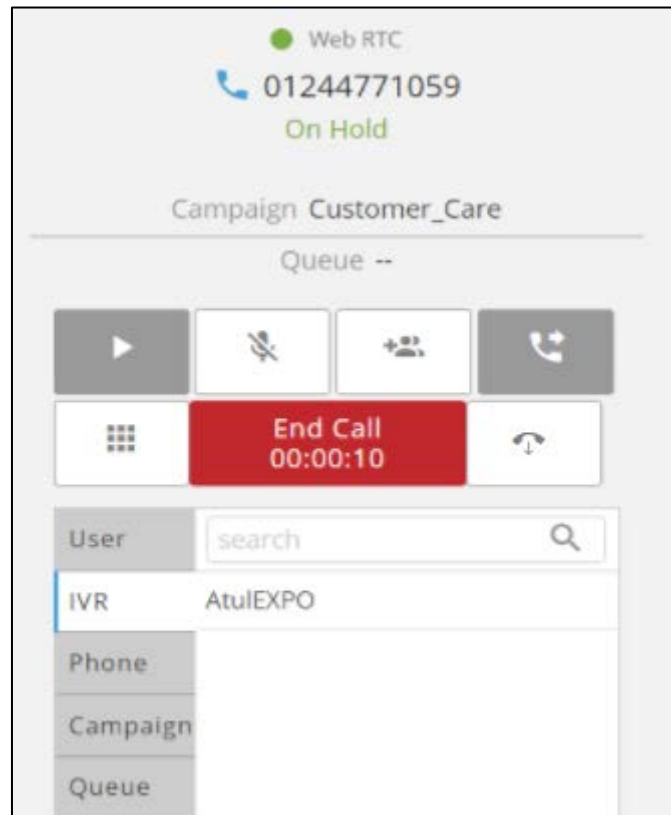


Figure: Call Transfer to IVR

1. Supervisor will put the customer call on hold by clicking on "HOLD" button and then click on "TRANSFER" button.
2. Supervisor 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.

6.6.5.3.3.4 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 Supervisor can use transfer to "Campaign" option.

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

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

This option can be used by Supervisor 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, Supervisor can re-route the call to correct queue by following below steps. This option is applicable for inbound campaigns only.

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

6.7 Schedule Callback in Workbench

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

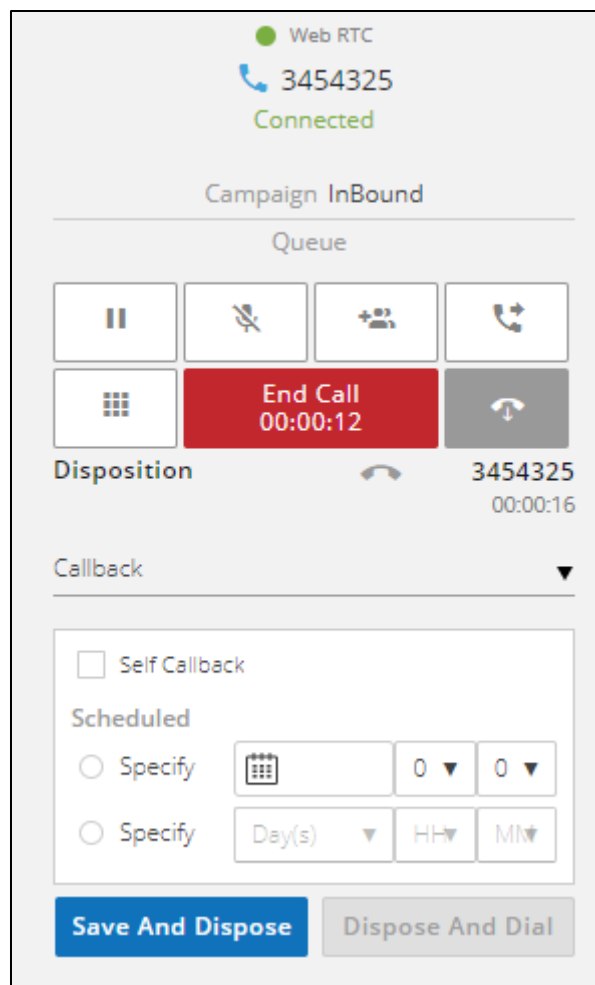



Figure: Schedule Callback

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

The scheduled call backs for the agents and Supervisor are displayed in "Manage" Tab → "Callback" tab of the respective campagins.

6.8 Callback Notification

1. At any time, an agent can view its upcoming callbacks 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 callbacks will be shown at the top of the screen.

7. Supervisor Logout from Ameyo

Supervisor is supposed to logout from the Ameyo application after the work or shift is over.

Supervisor can click on its name (top right corner) to access a menu..

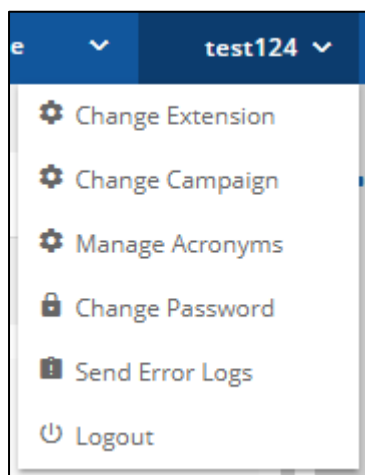


Figure: Logout from Ameyo

Click "Logout" to logout from the system.