exotel
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1. Exotel Contact Center Documentation

Overview

Welcome to the **Exotel Contact Center Documentation Portal**.

The Exotel enterprise contact center solution is erstwhile "**Ameyo"**.

This portal is your comprehensive resource for learning how to use, configure, and manage all features across the Omni Contact Center solution. Whether you are seeking information on setting up a new IVR flow, monitoring live agent metrics, or generating historical reports, this documentation provides step-by-step guides, feature explanations, and best practices.

> **The content is organized by functional area and feature hierarchy to ensure you quickly find the information relevant to the platform component you are working with.**
>
> We're enhancing this documentation. The earlier version remains available for reference. **Login** for detailed access.

How to Navigate and Find Information

The documentation is logically structured around the major functional components of the platform.

1. **Select a Feature Area:** Begin by choosing one of the main libraries below (e.g., Campaign Management or Real-Time Monitoring).
2. **Browse the Hierarchy:** Within each area, features are organized into logical three-level categories (e.g.,**Agent Desktop / Console** > **Workbench** > **Unified Agent Desktop**).
3. **Search:** Use the search bar at the top left of the portal to find specific terms, features (like "Call Barging," "Avg ACW Duration," or "Lead Penetration"), or administrative settings.

Key Business Use Cases

Need to solve a specific business problem? Here are common scenarios and where to find the relevant feature documentation:

- **Refine Dialing Strategy:** Look under **Outbound Voice Capabilities** for **Dialing Modes.**
- **Understand Supervisor :** Check **Monitoring & Analytics** for **Live Agent Coaching (Whisper & Barge)** (SLA Metrics) and **Dashboard** historical stats
- **Set Up a New User:** Start with **System & user Management** for **User & Role Management** .
- Enable seamless customer engagement across **voice , email, chat, social,** and **messaging channels with Ameyo's unified omnichannel contact center platform.**

For the **Exotel Contact Center Application Glossary** please check out the links below

A | **B** | **C** | **D** | **E** | **F** | **G** | **H** | **I** | J | K | **L** | **M** | **N** | **O** | **P** | **Q** | **R** | **S** | **T** | **U** | **V** | **W** | X | Y | Z

2. Definition Documents

2.1. Contact Center Application Glossary

This Glossary covers essential terms and abbreviations found in Exotel Contact Center documentation- Ameyo and common industry concepts. Please Note that these definitions provide quick guidance for better understanding, not exhaustive technical details.

Exotel Contact Center erstwhile "Ameyo" Application Glossary (A-Z)

A

- **Abandon Rate:** The percentage of calls that are abandoned by the customer while waiting in the queue. Formula: (Abandoned Calls / Offered Calls) * 100.
- **Inbound Routing Strategies /Automatic Call Distributor:** A system that routes incoming calls based on pre-defined rules (such as skill-based routing, FIFO, or priority) to ensure uniform call distribution across available agents.
- **Active Interactions:** The total number of interactions (calls, chats, etc.) currently being handled by agents in real-time.
- **Agent State:** The current status of an agent in the toolbar, typically:
  - **Ready / Available:** Waiting to receive a new interaction.
  - **Not Ready / Break:** Paused and unable to receive interactions.
  - **Busy:** Currently engaged in an interaction.
- **Auto-Call Off:** A toolbar setting that prevents the system from automatically connecting the next call, often used when the agent needs to perform an offline task.

- **Active-Active HA:** A redundancy configuration where multiple instances of the application run simultaneously. If one instance fails, another active instance seamlessly takes over to minimize downtime.
- **ACW (After Call Work):** The duration after a call disconnects during which an agent wraps up the interaction (e.g., adding notes or dispositions) before becoming available for the next call.
- **Agent Presence Management:** The ability to monitor, track, and control the availability status (e.g., Available, Break, Busy) of agents within the contact center.
- **Ameyo 360 AIM:** Application and Infrastructure Management module that collects error reports from agents and infrastructure, providing administrators with a top-down operational view.
- **Ameyo FusionCX:** A unified contact center solution package that includes capabilities for voice, email, social media, and chat interactions.
- **Ameyo Voiceblast:** A feature enabling businesses to send thousands of pre-recorded messages to customers simultaneously for alerts, reminders, or marketing.
- **API (Application Programming Interface):** Interfaces (such as User Management, Stats, or Ticketing APIs) that allow third-party applications to interact with Ameyo to manage data, users, or call controls.
- **Auto-failover:** A mechanism that allows a backup server to automatically take control and provide services if the primary server breaks down, ensuring high uptime.
- **Automatic Retries:** A configuration that sets specific retry times for numbers that were not reached (e.g., No Answer, User Busy).

B

- **Barge-In:** A supervisor feature allowing them to enter an active call between an agent and a customer to assist or take over.
- **Break Code:** A specific reason selected by the agent when going into "Not Ready" state (e.g., "Lunch," "Training," "Tea Break").
- **Blended Voice Campaign:** A configuration allowing agents to handle both inbound and outbound calls simultaneously, prioritizing inbound calls to reduce drop rates.
- **BYOB (Bring Your Own Bot):** Support for integrating third-party chatbots or voicebots into the Ameyo environment.

- **BYOK (Bring Your Own Key):** A security feature where the customer manages their own encryption keys for securing sensitive data like PII.

C

- **Calls in Queue (CIQ):** The real-time count of callers currently waiting to be connected to an agent.
- **Campaign:** A specific project or line of business configured in the application (e.g., "Sales_Outbound").
- **Conference:** A feature allowing an agent or supervisor to add guests (other agents, managers, or external numbers) to a live call for a multi-party conversation.
- **Cold Transfer:** Transferring a call to another agent or department without first speaking to the receiving party to provide context.
- **Callback Management:** A feature allowing agents or supervisors to schedule, view, and manage callbacks for customers who requested to be contacted later.
- **Chatbot:** An automated software program capable of interacting with customers to solve queries via text. It can hand off complex queries to human agents.
- **Churn Contact:** A logic that marks numbers as "churned" or ineligible for dialing based on specific customer information or criteria (e.g., excluding VIP customers from auto-dialing).
- **Cold Redundancy:** A backup configuration where the secondary system remains inactive until needed. It can be enabled manually or automatically in case of primary system failure.
- **CTI (Computer Telephony Integration):** Technology that allows computers to interact with telephone systems, enabling features like Screen Pops where customer data is displayed automatically when a call arrives.

D

- **Dialer State:** The current mode of the outbound dialer (e.g., Active, Paused, Stopped).
- **Disposition:** A status or tag assigned by an agent at the end of an interaction to classify the outcome of the call (e.g., "Sale Made," "Not Interested," "Callback Scheduled").
- **DB Column Encryption:** Security feature that encrypts specific columns in the database (using RSA encryption) to prevent data leakage of sensitive customer information.

- **ID (Direct Inward Dialing) Rotation:** A strategy where outbound calls rotate through a set of DID numbers to prevent calls from being flagged as spam and to increase answer rates.
- **Disaster Recovery:** A strategic plan and infrastructure setup (often involving a separate site) ensuring the quick resumption of mission-critical functions following a significant negative event.
- **DND (Do Not Disturb) / DNC (Do Not Call):** A repository of numbers that are excluded from dialing lists to comply with regulations or customer preferences.
- **DTMF (Dual-Tone Multi-Frequency):** The signals generated when a user presses keys on their telephone keypad, used for navigating IVR menus.
- **DTMF Tone Masking:** A security feature that masks the tones generated when a customer enters sensitive data (like PINs) by playing a noise, ensuring the agent cannot hear the actual input.

E

- **EWT (Estimated Wait Time):** An announcement played to customers in a queue, informing them of the approximate time until an agent answers.

F

- **Force Logout:** An administrative action to remotely log an agent out of the system.
- **Fetch Order:** The criteria defined for sorting and prioritizing the dialing list in an outbound campaign.
- **FIFO (First In, First Out):** A routing strategy where calls are distributed to agents in the exact order they were received.
- **Fixed Pace Dialer:** A dialing mode where a fixed number of calls are dialed per available agent based on a specific ratio.

G

- **Group Manager:** A user role with permissions to supervise and monitor a specific group of agents or campaigns.

H

- **Hold:** A toolbar action to temporarily pause the audio connection with the customer.
- **Hot Desking:** The ability for an agent to log in to the Ameyo application from any physical desk or device using their unique credentials.
- **High Availability (HA):** System architecture designed to ensure continuous operation and high uptime (e.g., 99.99%) through redundancy.
- **Hybrid Cloud:** An infrastructure setup combining on-premise hardware with cloud services.

I

- **In-App Notification:** Alerts displayed within the application interface regarding new tasks, callbacks, or system messages.
- **Interaction History:** A tab in the agent interface showing a chronological list of past interactions with a specific customer.
- **Internal Chat:** A collaboration tool allowing agents and supervisors to chat with each other within the Ameyo interface without leaving the platform.
- **IVR (Interactive Voice Response):** An automated telephony system that interacts with callers, gathers information via keypad inputs (DTMF), and routes calls to the appropriate recipient.

L

- **Lead Penetration:** A dashboard metric showing the percentage of leads in a list that have been attempted or contacted.
- **Live Monitoring:** The real-time dashboard allowing supervisors to view the status of agents, queues, and ongoing calls.
- **Login / Logout:** The action of an agent signing into or out of the application to start or end their shift.
- **LDAP Connector:** A module allowing user authentication using an enterprise's existing LDAP (Lightweight Directory Access Protocol) servers (e.g., Microsoft AD).
- **Lead to Queue Mapping:** The ability to designate specific sets of leads to be handled by specific groups of agents.
- **LWA (Longest Wait Agent):** A routing strategy that sends the next call to the agent who has been idle/waiting for a call the longest.

M

- **Manual Dialing:** Initiating a call by manually entering a phone number on the toolbar keypad.
- **Monitor / Snoop:** A silent monitoring feature allowing a supervisor to listen to a live call without being detected by the agent or customer.
- **Maker Checker:** A security principle in User Access Management where one person initiates a change (Maker) and a second person authorizes it (Checker).
- **Mobile SDK:** A Software Development Kit that allows businesses to integrate Ameyo's communication capabilities directly into their own mobile applications.
- **MRCP (Media Resource Control Protocol):** A protocol used to integrate Automatic Speech Recognition (ASR) and Text-to-Speech (TTS) engines with the contact center.

N

- **Number Masking:** A privacy feature that hides the phone numbers of both the customer and the agent during an interaction.

O

- **Offered Calls:** The total count of calls presented to the system or a specific queue in real-time.
- **Omnichannel:** A strategy providing a seamless customer experience across multiple channels (Voice, Email, Chat, Social Media), where context is preserved across interactions.

P

- **Pacing Ratio:** A dialer setting that determines how many outbound calls are placed per available agent (e.g., 1:1.5 means 1.5 calls dialled for every 1 free agent).
- **Preview Dialing:** A mode where customer details are shown to the agent *before* the system dials the number, giving them time to prepare.
- **PACE (ProActive Connect Enhancer):** An intelligent outbound dialing solution that analyzes interaction history to predict the most probable time a customer will answer.
- **Parallel Ringing:** An inbound routing scenario where a call rings simultaneously on all connected agents' devices until one answers.

- **Pattern Based Dialing:** A routing rule where the system decides how to dial a number based on its pattern (e.g., routing mobile numbers via GSM gateways and landlines via PRI).
- **PPD (Parallel Predictive Dialer):** An advanced dialer that detects answering machines and busy tones, connecting only live humans to agents. It runs multiple dialers in parallel for efficiency.
- **Preview Dialer:** A dialing mode where the agent is shown customer details *before* the call is placed, allowing them time to prepare.
- **Private Cloud:** A cloud computing model where IT services are dedicated to a single organization, often offering higher security and control.
- **Progressive Dialer:** A dialing mode that only begins dialing when an agent becomes available, ensuring a connected customer is never left waiting for an agent.
- **PSTN (Public Switched Telephone Network):** The traditional circuit-switched telephone network.

Q

- **Queue:** A "waiting line" for calls or interactions, where they are held until an agent with the matching skill set becomes available.
- **Quality Monitoring (QM):** The process of listening to, viewing, and scoring agent interactions to assess performance and identify training needs.

R

- **Ready Time:** The cumulative time an agent has spent in the "Available" state during the current session.
- **Real Time Agent Assist:** AI-powered live guidance provided to agents during a conversation, such as real-time translation or suggestion of answers.
- **Report Designer:** A tool enabling the creation of customized reports with specific data columns and formats (PDF, XLS, HTML).
- **Routing Policies:** Rules configured by administrators to determine how incoming calls are directed based on channel, DID, Caller ID, or time of day.

S

- **Screen Pop:** The automatic display of customer information (CRM data) on the agent's screen when a call arrives.
- **Service Level (SL):** A real-time KPI showing the percentage of calls answered within a target timeframe (e.g., 80% in 20 seconds).
- **Session:** The duration from an agent's login to logout.
- **SLA (Service Level Agreement):** The agreed-upon standard for response times or resolution times, monitored via dashboards.
- **Screen Recording:** The ability to capture and archive the activity on an agent's computer screen during a customer interaction.
- **Sentiment Analysis (Emotional Intelligence):** A feature using machine learning to analyze the mood and behavior of a customer (e.g., angry, happy) to prioritize cases or trigger alerts.
- **SIP Proxy Server:** A server acting as an intermediary for VoIP calls, enabling the unification of multiple call servers and handling tasks like network security and routing.
- **Skill-Based Routing:** A method of distributing calls to agents based on their specific skills (e.g., language proficiency, technical knowledge) rather than just availability.
- **Snoop:** A supervisory feature allowing a manager to listen to a live conversation between an agent and a customer without either party knowing.
- **Sticky Agent/Preferred Agent:** A routing feature that attempts to connect a customer to the same agent they spoke with previously to ensure continuity.
- **Synthesizer:** A visual, drag-and-drop tool used to design and re-engineer business rules, routing strategies, and interaction workflows.

T

- **Talk Time:** The real-time duration of the current conversation.
- **Task:** A unit of work in the workflow module (e.g., a ticket, a callback request) assigned to an agent.
- **Transfer:** Sending a live call to another destination.
    - **Blind Transfer:** Sending the call immediately without checking availability.
    - **Attended Transfer:** Speaking to the receiver before connecting the customer.
- **Table Filters:** Criteria used to filter customers in outbound campaigns based on specific attributes in the database.

- **TPV (Third Party Verifier):** A specialized external number or service used to verify customer consent or transactions, often required for compliance.
- **Two-Factor Authentication (2FA):** A security process requiring two distinct forms of identification (e.g., password + OTP) to access the system.

U

- **UAD (Universal Audio Device):** The component in the Ameyo interface that handles audio connections for the agent.
- **User Access Management (UAM):** The administration of user identities and permissions, ensuring users only have access to the specific tools and data they need.

V

- **Video Call:** An interaction involving two-way video, often used for KYC (Know Your Customer) or specialized support.
- **Video Quality:** A metric indicating the bitrate or stability of the video connection.
- **Video Workbench:** The agent-side interface for handling video interactions, including controls for camera and microphone.
- **VAPT (Vulnerability Assessment and Penetration Testing):** Security testing services provided to identify and patch vulnerabilities in the system.
- **Virtual Queue:** A feature allowing customers to hang up but maintain their position in the queue, receiving a callback when it is their turn.
- **Voicebot:** An AI-powered voice interface that converses with customers using natural language to resolve queries or route calls.
- **Voicelog Archiver:** A module that stores and indexes recorded calls for a defined retention period.
- **VPN (Virtual Private Network) Connect:** A secure way for remote agents to connect to the contact center infrastructure over the internet.

W

- **Wallboard:** A large-screen display or dashboard view showing critical real-time statistics (Queue Length, Service Level, Agent Status) for the entire floor.

- **Wrap-Up Time (ACW):** The time an agent spends completing after-call work (notes, disposition) before becoming ready for the next call.
- **Warm Transfer:** Transferring a call where the agent speaks to the receiving party first to explain the situation before connecting the customer.
- **WebRTC:** Technology enabling voice and video communication directly through a web browser without requiring external plugins or softphones.
- **Whisper:** A supervisory feature allowing a manager to speak to the agent during a live call without the customer hearing.
- **Whitelabeling:** The ability to customize the look and feel of the Ameyo interface (e.g., logos, colors) to match the branding of the organization using it.

2.2. Call Components Definitions

2.2.1. Call Components in Contact Center

Call Direction Types

In general, the following two types of call directions are identified in the Contact Center Industry. Sometimes they are also termed "Common Types of Calls" in the industry.

1. ***Inbound Call:*** A call that is initiated by the customer to the agent is an incoming call for a contact centre and known as Inbound Call.
2. ***Outbound Call:*** A call that is initiated by the agent to the customer to provide the services or to sell the product is an outgoing call for a contact centre and known as Outbound Call.

Call Types

In any system like Ameyo, the calls can be divided into the following two types.

1. System Generated Calls
2. Manually Generated Calls

System Generated Calls

These calls are managed by the Ameyo System itself. There is no or very less user involvement. For example – Auto dial, Schedule call-backs, and Auto preview dial calls.

Following table lists the System generated Call Types.

Call Types	Meaning	Call Direction Type
outbound.auto.dial	Automated outbound calls initiated by the dialer with any of the following algorithms: 1) Predictive Algorithm Calls	

2. Progressive Algorithm Calls | Outbound |
   | outbound.callback. dial | These calls are re-dialed to the previously dialed customers. It can be done due to any of the following reasons:
   1) Taking follow-ups from the Customers.
3. Customer's phone is not able to connect in the first time. | Outbound |
   | outbound.auto.preview.dial | These calls are dialed automatically by the Dialer with the Preview dialing Algorithm. After connecting the customer, a call is transferred to the agent and a preview of customer information is displayed on the agent's screen before taking the agent on call . | Outbound |

Manually Generated Calls

These calls are initiated by the Agent or Customer manually such as Inbound calls, Manual dialed calls, and transfer to campaign calls, etc.
Following table lists the Manual generated Call Types.

Call Type	Meaning	Call Direction Type
outbound.manual. dial	These are manually dialed calls, which are initiated by the agent because of the following reasons. 1) Dial Phone	

2. Dial customer
3. Dial missed calls

4. After preview dial customer | Outbound |
   | inbound.call.dial | These calls are dialed by the customers, which are received in the campaign through nodeflows.
   | Inbound |
   | outbound.manual. preview.dial | These are manual calls that are dialed by the agents with Preview Dial Algorithm.
   | Outbound |
   | transferred.to. campaign.dial | These calls are transferred from one campaign to another. Some of the possible reasons are given here in below.
   1) Agent transferred the calls manually using the "Transfer to Campaign" feature.
5. Calls transferred in the nodeflow using "TransferredToCampaign" Node. | All type of Calls |

Related pages

- **Call Control Functions**
- **Call Handling Capabilities**
- **Voice Telephony Panel**
- **Voice Resource Tab**
- **Inbound Voice Capabilities (IVR and ACD)**
- **Outbound Voice Capabilities**

2.2.2. Call Hang Up Details

Hang-up Cause Code in Ameyo

When the call gets disconnected due to any of the following reasons, the disposition set by the system is in the term known as Hang-up details.

Hang-up Cause Code	Meaning	Call Direction Types
Agent_Hangup_Phone	The agent has disconnected the call from the soft phone or IP phone manually.	All types of Calls
Agent_Hangup_UI	The agent has disconnected the call from the Ameyo User Interface.	All types of Calls
Customer_Hangup_Phone	The customer has disconnected the call on its own, that is the customer call leg id disconnected by the customer itself..	All types of Calls
Customer_Hangup_UI	When the agent has disconnected the call from Ameyo User Interface with the option Hangup Customer. In such a case, the customer call leg gets disconnect first.	All types of Calls
System_Media	When a Manual Dial call gets disconnected due to the any of the following reasons. 1. The agent phone is ringing but the agent did not answer. 2. The agent rejects the call. 3. The Agent phone codec is incompatible with the SIP entity. 4. The customer phone is ringing, but the csutomer did not answer. 5. The customer phone is ringing, but the customer had rejected the phone call.	Outbound
System_Media	When an Auto Preview Dial call gets disconnected due to the any of the following reasons. 1. The agent phone is ringing but the agent agent did not answer. 2. The agent had rejected the call.	Outbound

Hang-up Cause Code	Meaning	Call Direction Types
	3. The agent phone codec is incompatible with the SIP entity. 4. The customer phone is ringing but the customer did not answer. 5. The customer phone is ringing but the customer had rejected the call.	
System_Media	The Inbound call gets disconnected due to any of the following possible reasons. 1. The nodeflow hang-up the call without answering to it. 2. The customer call is not answered 3. The agent's phone is not reachable. 4. The customer answered the call but the agent did not answer the call.	Inbound
System_Hangup	In the manual dial call, when both the agent and the customer are connected on the call, but the supervisor disconnects the call in any of the following cases. 1. The agent and the customer both are connected on the call but Supervisor hangs-up the call. 2. The agent transfers the call but another agent does not answer to it, and the supervisor disconnects the call. 3. The agent transfers the call to another agent, and the answers, but supervisor disconnects it. 4. The agent put the call on hold and then transfers it but the another agent does not answer to it, and the supervisor disconnects it. 5. The agent put the call on hold and then transfer it to another agent, and the transferee (the agent to whom call is transferred) answers, but still, the supervisor disconnects it.	Outbound

Hang-up Cause Code	Meaning	Call Direction Types
	6. The agent put the call on hold for sometime and then resumes it, but the supervisor disconnects it. 7. The agent put the call on hold but does not resume, and then supervisor disconnects it.	
System_Hangup	In an Auto Dial call, when both the agent and the customer are connected on the call, but the Supervisor disconnects the call in the following cases. 1. The agent and the customer both are connected on the call but the Supervisor hangs-up the call. 2. The agent transfers the call but the another agent does not answer, and the supervisor disconnects the call. 3. The agent transfers the call to another agent, and the transferee (the agent who receives the call) answers, but still the supervisor disconnects it. 4. The agent put the call on hold and then transfers it, but the another agent does not answer, and the supervisor disconnects the call. 5. The agent put the call on hold and then transfers it to another agent. The transferee (the agent who receives the call) answers, but still the supervisor disconnects it. 6. The agent put the call on hold for sometime and then resumes it, but the supervisor disconnects it. 7. The agent put the call on hold but does not resume, and then, the supervisor disconnects it.	Outbound
System_Hangup	It is displayed when the Supervisor disconnects an Inbound call from its console due to any of the following reasons. 1. The agent and the customer both are connect on the call but still the Supervisor hang-up the call.	Inbound

Hang-up Cause Code	Meaning	Call Direction Types
	2. The agent transfers the call but another agent does not answer to it, and the supervisor disconnects the call. 3. The agent transfers the call to another agent, and the transferee (the agent who received the calls) answers, but still the supervisor disconnects it. 4. The agent put the call on hold and then transfers it, but another agent does not answer to it, and the supervisor disconnects it. 5. The agent put the call on hold and then transfer it to another agent, and the transferee (the agent who receives the call) answers, but still, the supervisor disconnects it. 6. The agent put the call on hold for sometime and then resumes it, but the supervisor disconnects it 7. The agent put the call on hold but does not resume, and the supervisor disconnects it.	
normal.clearing	This cause indicates that the call is being cleared because one of the users involved in the call has requested that the call has to be cleared. Under normal situations, the source of this cause is not a network. Following are some of the main reasons due to which this situation may occur. • Response to the status enquiry • A normal or unspecified number • Channel not implemented • Info.element not implemented or not-exists • Trying to connect with the customer • The call is being forwarded • The call is queued • Session progress	Inbound + Outbound

Hang-up Cause Code	Meaning	Call Direction Types
	• Extension required • Interval too brief • Address of the destination is incomplete • Server timed-out	

2.3. Dispositions Definitions

2.3.1. Standard Definition of Dispositions

Overview

A disposition is an outcome of an inbound or outbound contact. The Dispositions are created to assist the Agent in quickly describing the outcome of a contact after the call is completed. An Agent can choose from a disposition list to describe the outcome of that particular call. There are three levels of Dispositions.

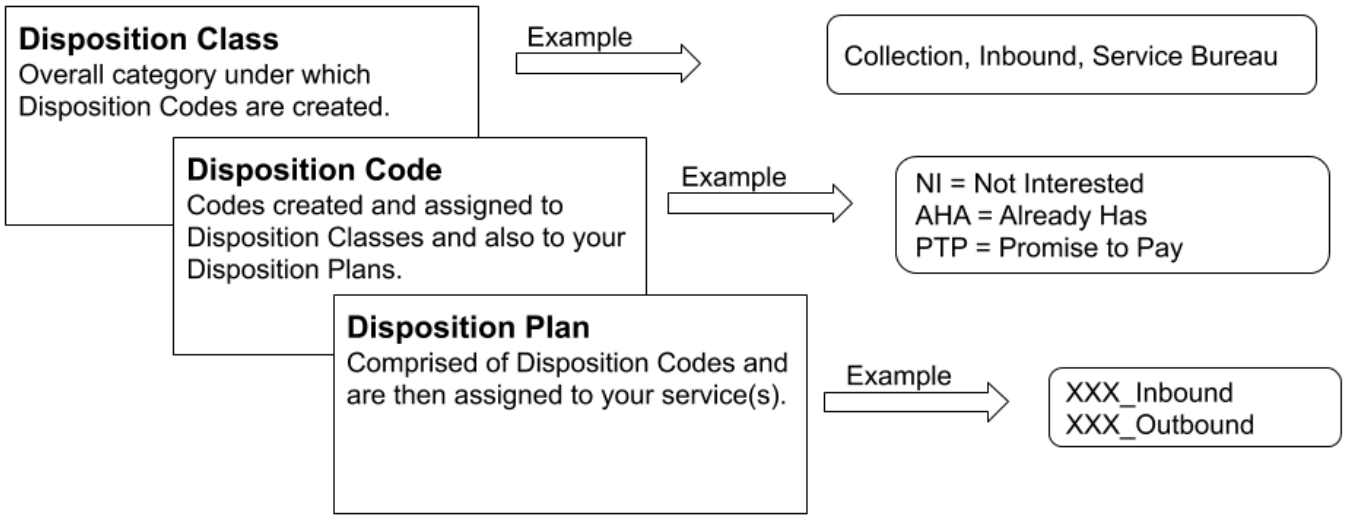


Figure: Disposition Flow

Disposition Plan

To layout all the disposition classes and disposition codes, it is mandatory to create a Disposition Plan. Disposition plan helps to create all the classes and the codes for the organization.

Disposition Class

A disposition class is a term that refers to an overall category under which dispositions are created. Dispositions classes are either user defined or already exist determined by the Gateway. For example, you can create a user defined disposition class called “Do Not Call,” under which you can create dispositions like Not_Interested or Wrong_Number.
As you create dispositions, you can group all of your dispositions into a single disposition class or multiple disposition classes.
If you are an organization, who provide the services to many different companies, you might want to create a classification for each of your different customers (like, Customer1 Telco Group, Customer2 Bank, etc.).

Disposition Code

A disposition code is a combination of character that is used to describe the outcome of a contact. There are two types of disposition codes. The first is an Unified IP system type, which is tied to the Gateway disposition classes. All disposition code types are system generated and automatically appear in your disposition code list.
Disposition created by users are called User Type. User Dispositions are optional and only required if Agents are required to choose a disposition at the end of each call.
The following describes the elements that make up a disposition:

- Disposition number ID
- Names given to the dispositions
- Codes assigned to a disposition (maximum of eight characters).
- Whether the disposition created is Unified IP system or user defined
- Disposition classes used to group the dispositions
- Attributed, call outcomes, and routing

2.3.2. System Dispositions in Exotel Contact Center

System Dispositions are those which are generated by the system automatically. The calls to which these dispositions are applicable, are disposed of by the system itself.

System Defined Dispositions

When a call disconnects or the agent is not able to dispose of the call due to any of the following reasons (called Cause codes), then the system will provide the dispositions automatically. The dispositions are known as System Defined Dispositions.

Disposition Code	Meaning	Cause Codes	Call Direction Types
BUSY	If the customer is having the call from another source and will not be able to attend the agent's call, then the call disposed of with this disposition. It happens because of the following reasons. 1. User Busy 2. User not responding. 3. No answer from User.	• setup.timeout • busy • provider.temp.failure • number.failure • Provider.failure	Outbound
No_ANSWER	If the call ring timed out, or the customer disconnected the call without receiving it, then the call is disposed of with this disposition.	Not attended	Outbound
CONNECTED	If a call gets connected with the customer and the communication between the customer and agent sets up, then the call is disposed of with this disposition.	• setup.timeout • busy • normal.clearing • provider.temp.failure • number.fa	All type of Calls

Disposition Code	Meaning	Cause Codes	Call Direction Types
		ilure • Provider.failure	
CALL_DROP	If a call is waiting in the ACD Node. but none of the agent is found free thus the call gets disconnected without having the communication with any agent, then the call is disposed of with this disposition.	• setup.timeout • busy • normal.clearing • provider.temp.failure • number.failure • Provider.failure • Unknown	Inbound
CALL_HANGUP	If both the agent and the customer are connected on the call, but the call gets disconnect due to any issue, or the customer channel is up, then the call is disposed of with this disposition.	• hangup.job.timed.out • setup.tim	All type of Calls

Disposition Code	Meaning	Cause Codes	Call Direction Types
		eout • busy • normal.clearing • provider.temp.failure • number.failure • provider.failure • Unknown	
CALL_NOT_PICKED	If the agent does not answer the call or the call hangs up before answering to it, then the call is disposed of with this disposition. The possible reasons are listed hereinbelow. 1. The agent does not pick the call and ring times out. 2. The call hangs up before agent answers to it.	• setup.timeout • busy • normal.clearing • provider.temp.failure • number.fa	Inbound, Outbound Auto Dial and Call Transfer.

Disposition Code	Meaning	Cause Codes	Call Direction Types
		ilure • Provider.failure	
AMD	If the call gets disconnected due to customer channel is up, then the customer's channel will break and call will be disconnected and disposed of with this disposition.		Outbound
ATTEMPT_FAILED	If the customer channel does not establish due to any of the following reasons, then the call is disposed of with this disposition. 1. The maximum call limit set by the administrator or the supervisor exceeded in the campaign. 2. Maximum call limit exceeded for allowed calls in the call context assigned to the campaign. 3. The call server is not established. 4. The call server is not reachable. 5. Preview call being canceled due to any of the reasons. 6. There is no free agent for the scheduled callbacks		All type of Calls
NUMBER_FAILURE	If the call dialled to any number is hang-up due to any of the following reasons, then the call is disposed of with this disposition. 1. Number unassigned to any of the Queue. 2. There is no route to the specified transit network. 3. No route found to the destination. 4. Customer's Number has been changed. 5. The number dialed in the wrong format.	• number.failure • setup.timeout • provider.te	Outbound

Disposition Code	Meaning	Cause Codes	Call Direction Types
	6. Multiple Choices arises. 7. The number has been moved permanently. 8. The number has been moved temporarily. 9. The customer is using Proxy network. 10. The possibility of alternative services. 11. The number is not Reachable 12. Bad Extension. 13. The customer has declined the call. 14. The number does not exist anywhere in the Ameyo System.	• mp.failure • provider.failure	
NUMBER_TEMP_FAILURE	If the call dialed to a number hang-up due to any of the following reasons, then the call is disposed of with this disposotion. 1. Call Rejected by the customer. 2. The facility by the provider rejects the calls. 3. Invalid call reference value. 4. Request Entity is too large. 5. Request-URI is too large.		Outbound
PROVIDER_FAILURE	If the call hang-up due to the Provider failure because of any of the following reasons, then the call is disposed of with this disposition. 1. Channel unacceptable 2. Destination out of order 3. Access information discarded 4. Facility not subscribed 5. Outgoing call barred 6. Incoming call barred	• busy • setup.timeout • provider.failure • provider.te	Outbound

Disposition Code	Meaning	Cause Codes	Call Direction Types
	7. Bearer capability not authorized 8. Bearer capability not available 9. Bearer capability not implemented 10. Call Facility not implemented 11. Incompatible destination 12. Message-Type does not exist or incorrect type of message 13. Bad Request from the client 14. Unauthorized number 15. Payment pending 16. Forbidden network 17. Method Not Allowed 18. Proxy Authentication Required 19. Unsupported Media Type 20. Unsupported URI Scheme 21. Channel is not acceptable by the client. 22. Undecipherable that is the recipient is not able to decrypt the message or MIME body. 23. The number is not implemented over the network. 24. Call version is not supported.	mp.failure	
PROVIDER_TEMP_FAILURE	If the call hang-up due to the Provider failure but will resolve after sometime due to any of the possible reasons, then the call is disposed of with this disposition. 1. Congestion in the circuit or channel 2. Network out of order 3. Temporary failure issue	• number.failure • setup.timeout	Outbound

Disposition Code	Meaning	Cause Codes	Call Direction Types
	4. Switching equipment Congestion 5. Requested channel not available 6. Pre-empted Network 7. Invalid / Unspecified message 8. The mandatory information element is missing 9. The wrong message entered 10. Request Timeout 11. Call or transaction does not exist 12. Loop detected in the network 13. Too Many Hops 14. Ambiguous Network 15. Request Terminated 16. Request Pending 17. Server Internal Error 18. Bad Gateway 19. Service Unavailable 20. The message is too large.	• provider.failure • provider.temp.failure • Licence Exhausted	
SYSTEM_ERROR	If the call gets connected successfully, but the customer channel disrupted unsuccessfully at the time of the call hangup or an error occurred at the customer channel end because of the following possible reasons, then the call is disposed of with this disposition. 1. Voice resource is not available. 2. Voice resource is not responding.Error received on requesting hangup on customer channel		All type of Calls

Disposition Code	Meaning	Cause Codes	Call Direction Types
FAILED	If the call hangs up due to any unknown error.	• Busy • setup.timeout • provider.temp_failure • provider.failure • number.failure	All type of Calls
SIT_REORDER	If the wrong number has been dialed or the number is not equal to the defined number format dialed (for example, less than 10 digits in the mobile number), then the call is disposed of with this disposition.	SIT Reorder	Outbound
SIT_NOCIRCUIT	If all circuits from which the call connects are busy, then the call is disposed of with this disposition.		Outbound
SIT_INTERCEPT	If the customer's number changed or disconnected due to the unknown reason, then the call is disconnected with this disposition.		Outbound
Transfer to phone SIT_VACANT	If the number is unassigned to any queue in Ameyo,.		Outbound

Disposition Code	Meaning	Cause Codes	Call Direction Types
NOT_TRIED	If the Supervisor churn some of those numbers from the Lead in Outbound Auto Dial that has to be dialed again, then the call made to these numbers will be disposed of with this disposition.		Outbound

System Generated User Dispositions

The dispositions which will insert after those calls which are not completed due to any reason, then the system will insert the disposition automatically. When this scenario happens, the inserted call disposition is known as User disposition – set by System

Disposition Code	Meaning	Suggested Call Types
user.forced.logged.off	If the user logged off from his account while on the call, then the call is disposed of with this disposition. It may happen due to various reasons like server goes down or internet connectivity breaks down.	Inbound + Outbound
entity.forced.clean.up	If the entity of the call gets cleaned-up forcedly, then the call is disposed of with this disposition.	Inbound + Outbound
failed.association	In case of re-ACD, when the call call comes back to its previous ACD node, the disposition code for the previously associated user is marked as a failed association.	Inbound + Outbound
wrap.timeout	The call will not get disposed of in the provided time; then the system set this disposition automatically.	Inbound + Outbound
user.cancelled.preview	The agent canceled the call after watching the details of the customer, then this disposition is set.	Inbound + Outbound
user.transferred.to.aq	If a call is transferred to the agent's queue by the previously assigned agent, then this call on behalf of the transferor (the agent who transferred it) is disposed of with this disposition.	Inbound + Outbound
user.transferred.to.ivr	Upon call transfer from one campaign to another, if the customer disconnects the call from the IVR before the call gets connect to another Agent, then this call is disposed of with this disposition.	Inbound + Outbound
user.transferred.to.campaign	If the call transferred to another campaign by the agent, and the previously assigned agent failed to dispose of the call successfully, then the call is disposed of with this disposition.	Inbound + Outbound
entity.transferred.to.campaign	If the call transferred to another campaign from the nodeflow, then the call is disposed of with this disposition.	Inbound + Outbound

2.3.3. User Disposition in Exotel Contact Center

Overview

There are some commonly known dispositions that an agent can insert at the time of the call disposition. These dispositions available in the Ameyo System, by default. The Administrator can manage these dispositions. These are the runtime dispositions that have to be inserted by the agents manually.

Disposition Code	Meaning	Cause Codes	Call Direction Types
Abrupt Disconnection	When the connection between the agent and the customer abrupt or there is some miscommunication that leads to break the communication between them is known as Abrupt Disconnection. It generally happens when either the agent or the customer is in the area where the networks are not proper like on mountains, forest areas or the basement.	Network Issue	All type of Calls.
Agent volume is too low	When the customer is not able to hear the agent's voice properly, and the communication will not complete.		All type of Calls.
Already Hangup	When the customer already hang-up the call in the first time and do not want to communicate with the agent again. **Or** when the agent transferred the call to another agent and customer disconnects the call, but agent answers the call for a few seconds.		Outbound
Conference DTMF	DTMF stands for Dial Tone - Multi-frequency. During the call with the agent, if the customer has to enter some digits into the IVR system through keypad on its phone, especially in cases where the customer is not telling the digits to the agents, thenn DTMF node is used to take numerical input from the customer on the call with the agent. Such a call can be disposed of with "Conference DTMF". This disposition can also use at the time of a conference call when the OTP is sent on another person's number, and that person is also on the conference call.		All type of Calls.

Disposition Code	Meaning	Cause Codes	Call Direction Types
Conference Disconnection	The name specifies it's meaning itself. During the the conference call, the third party call (the last dialed number) gets disconnect with the agent or customer.		All type of calls
Conference Voice Breakage	During the conference call, the third party's call voice has a disturbance due to the network problem.	Network Issue	All type of calls
Customer not able to Hear	When the customer is not able to hear the voice of the agent, and there is no outcome of the call.	Network Issue	All type of calls
Customer Volume too Low	When the agent is not able to hear the Customer's voice properly.		All type of Calls

Disposition Code	Meaning	Cause Codes	Call Direction Types
Echo	When the voice either of agent or customer produces echo, and anyone of them is not able to hear the voice properly.	Network Issue	All type of Calls
Foreign Language	When the agent is not able to understand the language of the customer. It may be like the customer is using some other language which the agent is not able to understand.		All type of Calls
Sale	When the customer finally agrees to purchase the service offered by the organization.		Outbound
Voice Breakage	When there is a disturbance in the voice of the customer or the Aagent and anyone of them is not able to understand the voice of the other properly. It may happen due to network issues.	Network Issue	

2.3.4. Call Failure Reason Notifications

2.4. Reporting Database Schema Definitions

2.4.1. Campaign_Context_Dimension Table

2.4.2. Agent_Queue_Dimension Table

2.4.3. Users_Dimensions Table

2.4.4. Campaign_Agent_Productivity_Per_Interval_ Table

2.4.5. Campaign_Session_Denormalized_Data Table

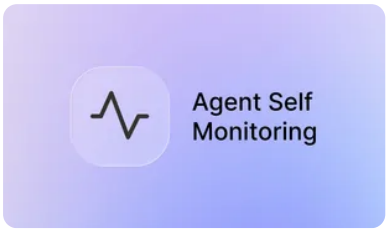
2.4.6. ACD_Interval_Denormalized_Entity Table

3. App Marketplace

3.1. Introduction to App Marketplace

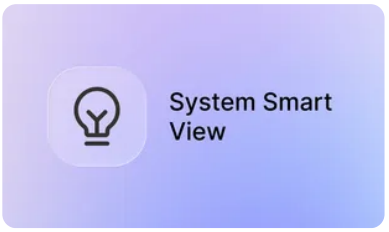
3.2. App Gallery

Monitoring and Analytics Apps:



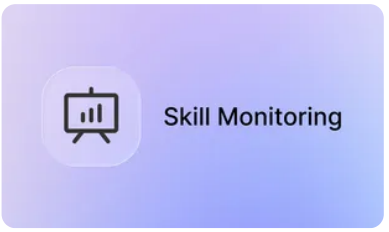
Agent Self Monitoring App

An app that provides a platform for agents to view their own data related to login duration, total calls attended, and break times.



System Smart View App

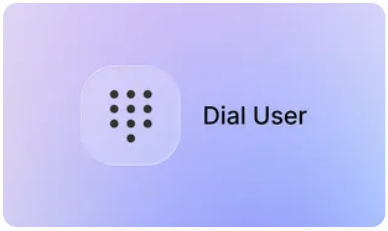
The System Smart View App provides a real-time monitoring interface consolidating the entire workforce's status across the contact center system.



Skill Monitoring App

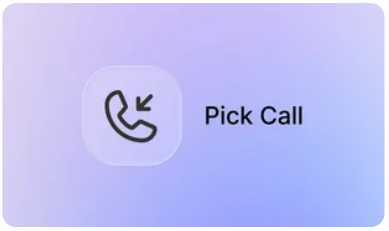
A side-panel application for Supervisors that provides real-time monitoring of specific Skills (Queues), including agent availability counts and detailed agent status lists within those skills.

Communication and Call Handling Apps



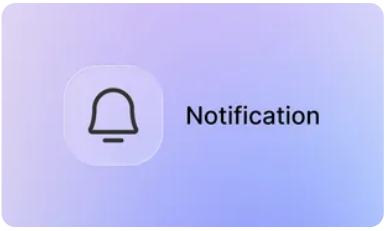
Dial User App

A productivity widget that enables agents and supervisors to search for and dial colleagues directly from the Ameyo side panel, eliminating the need to memorize extensions.



Pick Call App

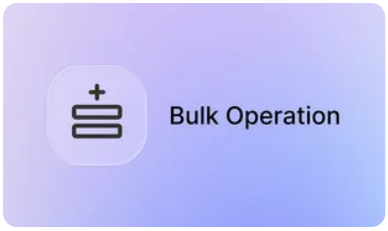
A queue management widget that allows agents and supervisors to view all waiting calls and manually select which call to answer next, bypassing the standard FIFO (First-In-First-Out) routing.



Notification App

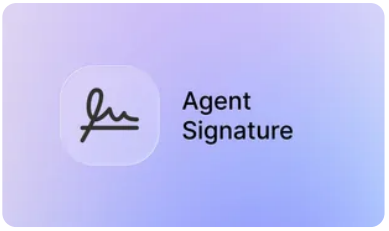
A broadcasting tool that enables Administrators and Supervisors to send real-time, pop-up messages to agents across the contact center or to specific user groups.

Workflow and Productivity Apps



Bulk Operation App

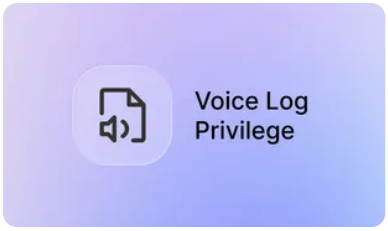
Enable agents and supervisors to handle high ticket volumes efficiently. They can select multiple tickets and apply updates at once. Instead of resolving issues one by one, users can take mass actions like Bulk Close, Escalate, or change Status with a single click.



Agent Signature App

A personalization utility that allows agents to configure a custom signature (name,contact details, branding), which is automatically appended to the end of every outbound email they compose.

Security and Compliance Apps



Voice Log Privilege App

A permissions utility that grants agents, supervisors the ability to access, listen to, and download their own voice call recordings directly from the workbench

Feedback

Feedback and feature requests can be submitted through the Contact Center App Marketplace portal to contribute to the enhancement of future releases.

The Ameyo App Marketplace initiative aims to offer scalable, customer-friendly custom applications that boost contact center performance by enabling self-service options and driving innovation.

3.3. Monitoring and Analytics

3.3.1. Agent Self Monitoring App

Use real-time personal metrics to master your daily performance

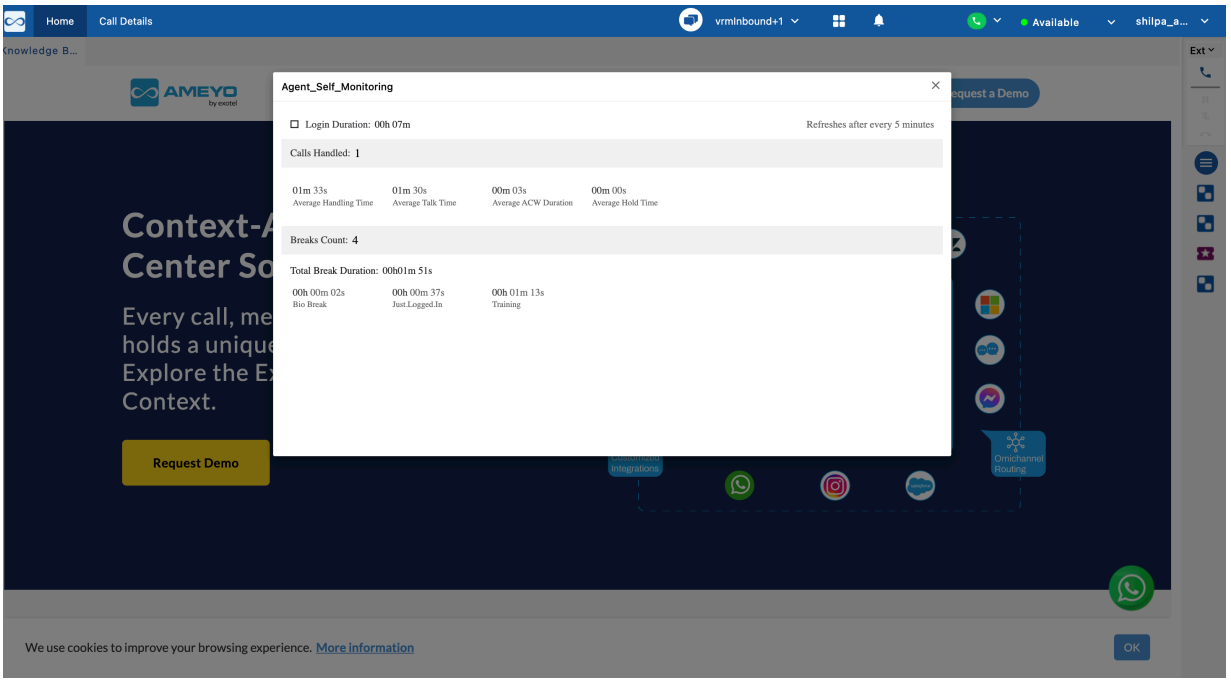
⬇ Download App



Description | How to Install and Configure App

What is this App?

The Agent Self Monitoring App is a comprehensive platform designed to display key agent-related metrics such as login duration, call activity, and break times. It provides stakeholders with real-time and historical data to better understand agent performance and availability at the system level. This app enhances visibility into agent activities, enabling supervisors and managers to optimize workforce management.



Why Use This App?

Standard workflows often leave agents in the dark about their real-time performance. This app solves:

- **Lack of Visibility:** Agents get an instant view of their own metrics, including login duration, total calls attended, and break bifurcation, without guessing.
- **Supervisor Dependency:** It eliminates the need for agents to constantly ask supervisors or admins to pull basic daily performance reports for them.
- **Manual Errors:** Removes the need for manual tracking or database entries to calculate agent activity, reducing human error.

Who is this App for?

This app is for agent user role.

Impact & Key Benefits

Installing this app will also provide the following benefits

- **Real-time Agent Insights:** Monitor login, call, and break metrics for individual agents.
- **Enhanced Workforce Management:** Supports data-driven decisions for agent performance and resource allocation. Also, reduces the time spent manually providing agents with their basic daily statistics.
- **Solving Lack of Visibility:** It addresses the problem of agents having no direct visibility into their own real-time performance metrics.
- **Reducing Supervisor Dependency:** It solves the need for agents to ask supervisors to pull basic reports for their login, call, and break statistics.
- **For Business,** it helps promotes agent autonomy and accountability, which can lead to improved self-management and productivity.

Prerequisites

Before installing, please ensure you meet the following requirements:

- Access to the Ameyo contact center system with permission to view agent monitoring data.
- The Ameyo App Installer (App Manager in Admin panel) must be set up and configured first. This app is used to upload and manage the custom apps such as Agent Self-Monitoring App. See **App Manager** documentation.

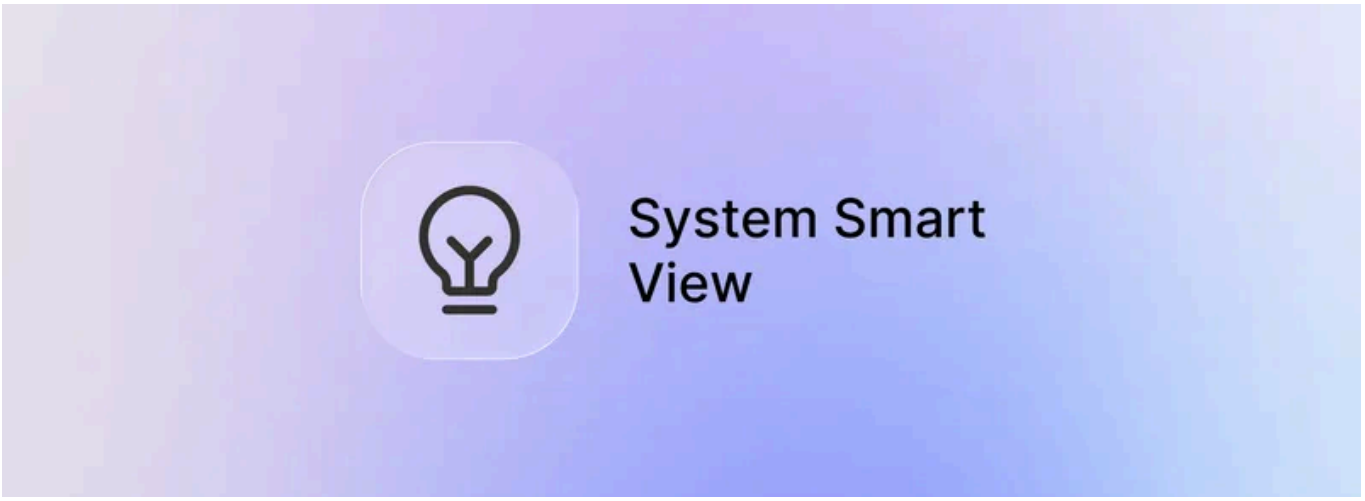
Summary

The **Agent Self-Monitoring App** empowers agents with a personal performance dashboard directly within their interface. It provides real-time visibility into critical metrics such as total login duration, call counts (success and failed), and detailed break activity (e.g., meetings, snacks). By aggregating this data at a system level, it removes the need for manual tracking or supervisor intervention, allowing agents to self-manage their productivity effectively.

3.3.2. System Smart View app

Use real-time system visibility to optimize your workforce instantly

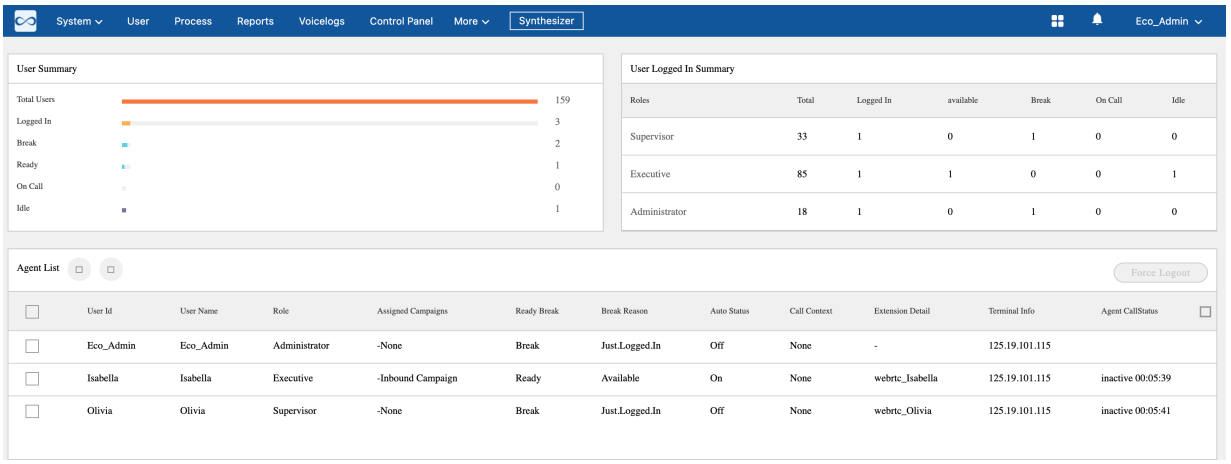
⬇ Download App



Description | How to Install and Configure

What is this App ?

The System Smart View App (also known as **Smart User App**) is an administrative dashboard for Ameyo that provides real-time, comprehensive insights into contact center performance. It aggregates user summaries, login statistics, and agent activity into a centralized interface accessible by Administrators, Voice-Admins, and Supervisors.



Why Use This App?

The app resolves fragmentation by delivering a **centralized, system-level view** of all agents and users, rather than isolated campaign views. Benefits include:

- **Centralized Visibility:** Monitor all users across the entire contact center.
- **Role-Based Breakdown:** Quickly distinguish active supervisors, agents, and admins.
- **Real-Time Status:** See workforce states instantly, optimizing staffing and resource allocation.

Who is this App for?

This app is for Supervisor and Adminuser role.

Impact & Key Benefits

- **For Admins and Voice-Admins:** Instant assessment of system load and user concurrency.
- **For Supervisors:** Real-time agent availability views for efficient workforce management.
- **For Business:** Improved resource utilization by identifying idle times and breaks at a macro level.

Prerequisites

Before installing, please ensure you meet the following requirements:

- **Ameyo Version:** 4.2 or higher.
- **App Manager:** You must have the **Ameyo App Installer** configured. See **App Manager** documentation.
- **User Role:** IT Administrator or Voice-Admin access.

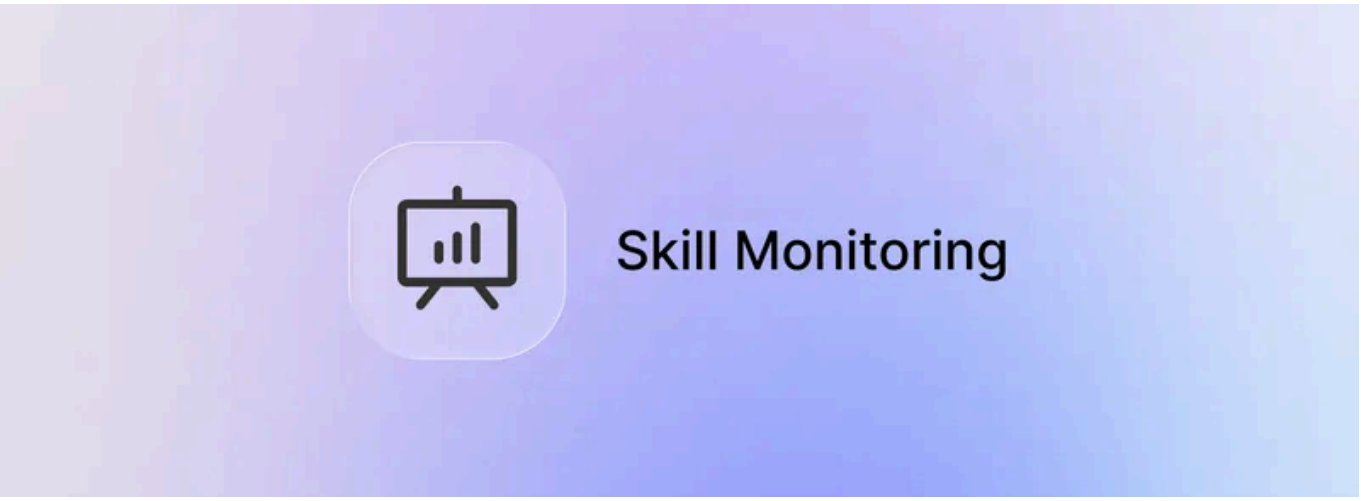
Summary

The **System Smart View App** centralizes operational visibility across Ameyo's contact center environment, streamlining workforce management and proactive decision-making for administrators and supervisors alike.

3.3.3. Skill Monitoring App

Use granular skill tracking to spot and fix staffing gaps instantly

⬇ Download App



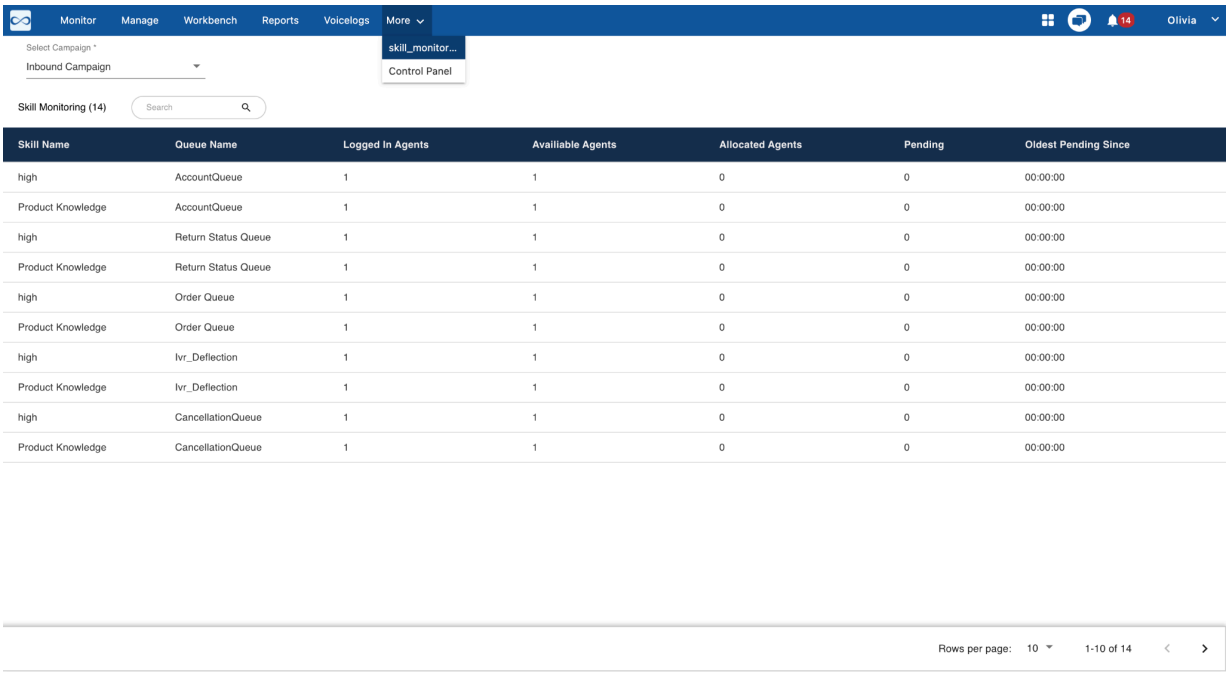
Description | How to Install and Configure App

What is this App?

The **Skill Monitoring App** is a **"Panel App"** designed specifically for the Supervisor interface. Unlike full-page dashboards, this app sits in the **Right Side Panel** of the Ameyo interface, allowing Supervisors to monitor operations without leaving their main screen.

It displays two layers of data:

1. **Skill Summary:** A high-level view of specific Skills (Campaigns/Queues) and the count of agents in various states (Ready, Break, On Call).
2. **Agent Details:** A drill-down list showing the specific agents assigned to those skills, including their Name, Extension, current State, and Duration in that state.



Why Use This App?

Supervisors often need to monitor specific high-priority queues while performing other tasks. This app solves the need for:

- **Granular Monitoring:** Instead of a system-wide view, view data specific to the Skills you manage.
- **Accessibility:** It remains persistent in the side panel, allowing for quick checks on staffing levels.

Who is this App for?

This app is for Supervisor user role.

Impact & Key Benefits

- **Real-Time Staffing Insight:** Instantly see if a Skill is understaffed (e.g., too many agents on "Break" or "Not Ready").
- **Agent State Tracking:** Quickly identify agents who have been in a non-productive state (e.g., "On Break") for a long duration.

Prerequisites

Before installing, please ensure you meet the following requirements:

- Access to the Ameyo contact center system.
- **App Manager** The **Ameyo App Installer** must be configured.
- **User Role:** IT Administrator (for installation) and Supervisor (for usage).

Summary

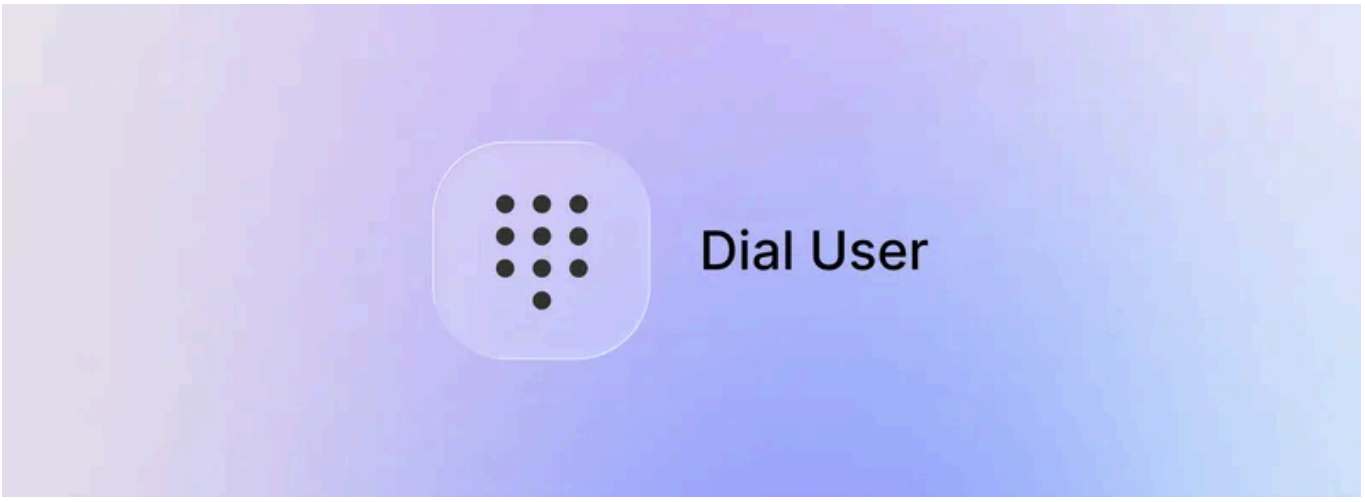
The **Skill Monitoring App** empowers Supervisors with a persistent side-panel widget for granular, real-time oversight of specific queues (Skills). By combining high-level availability counts with detailed agent status lists—including state duration—it allows Supervisors to instantly identify staffing gaps and monitor agent productivity without leaving their primary workflow.

3.4. Communication and Call handling Apps

3.4.1. Dial User App

Use one-click dialing to connect with your team instantly

⬇ Download App

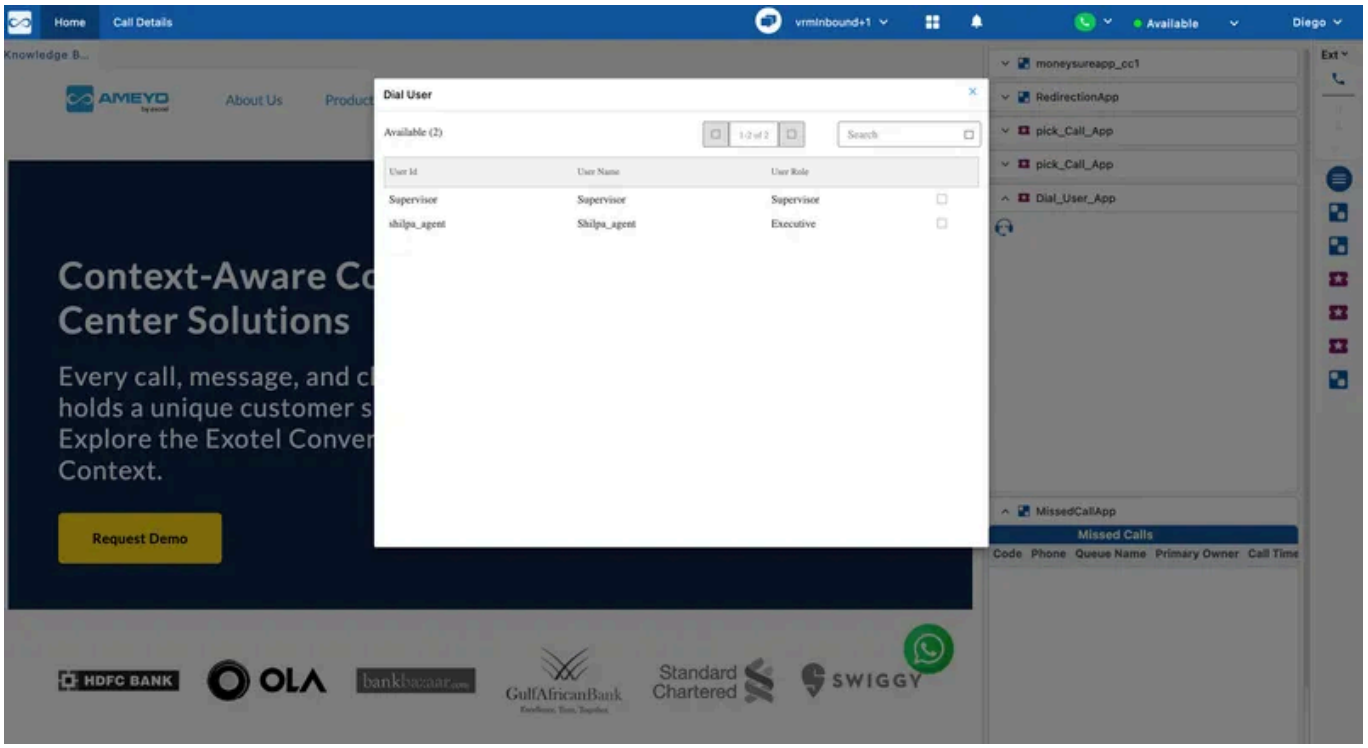


Description | How to Install and Configure App

What is this App about?

The **Dial User App** is a utility widget designed to sit in the side panel of the Ameyo user interface. It provides a search-and-dial interface that allows users to find other agents or

supervisors within the system and initiate a call immediately.



Why Use this App?

Communication within a Contact Center often suffers from friction when users have to manually look up extensions or hunt for phone numbers. This app:

- **Eliminates Manual Dialing:** Users no longer need to type in extension numbers manually.
- **Simplifies Internal Connection:** finding a colleague is as simple as typing their name.

Who is this App for?

This app is for Agent and Supervisor user role.

Impact & Key Benefits

- **For Agents:** Rapidly contact supervisors or peers for support without leaving the primary workspace.
- **For Business:** Reduces handling time (AHT) by speeding up internal consults.

Prerequisites

Before installing, please ensure you meet the following requirements:

- Access to the Ameyo contact center system.
- The Ameyo App Installer (App Manager in Admin panel) must be set up and configured first. See **App Manager** documentation.

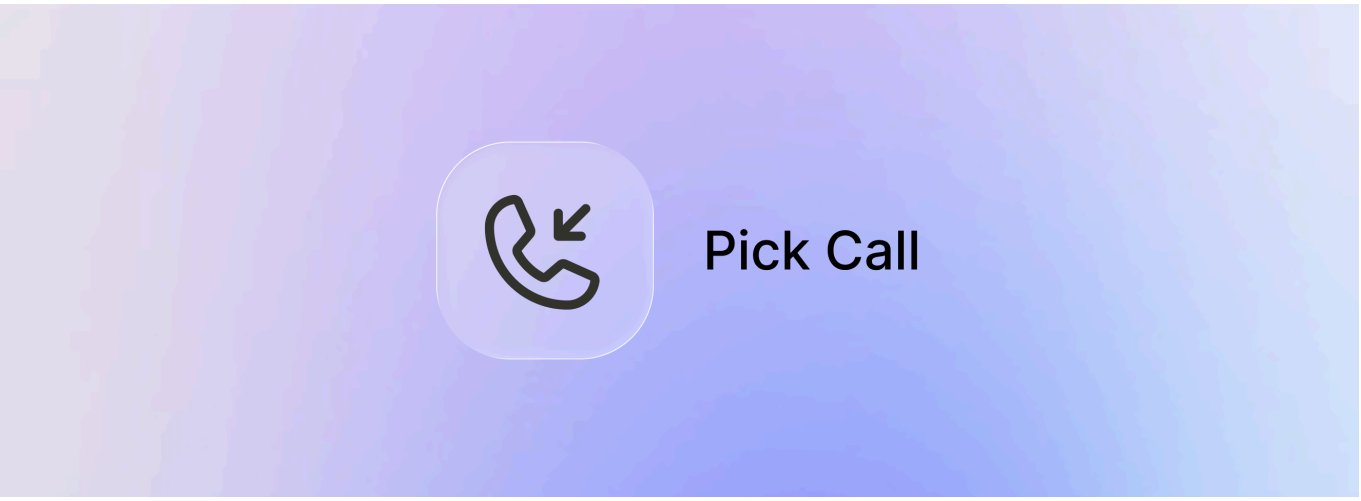
Summary

The **Dial User App** streamlines internal communication by integrating a user directory and dialer directly into the side panel. By removing the need for manual extension dialing, it enhances operational efficiency and allows agents to resolve internal queries faster.

3.4.2. Pick Call App

Use visual queue selection to answer high-priority calls instantly

⬇ Download App



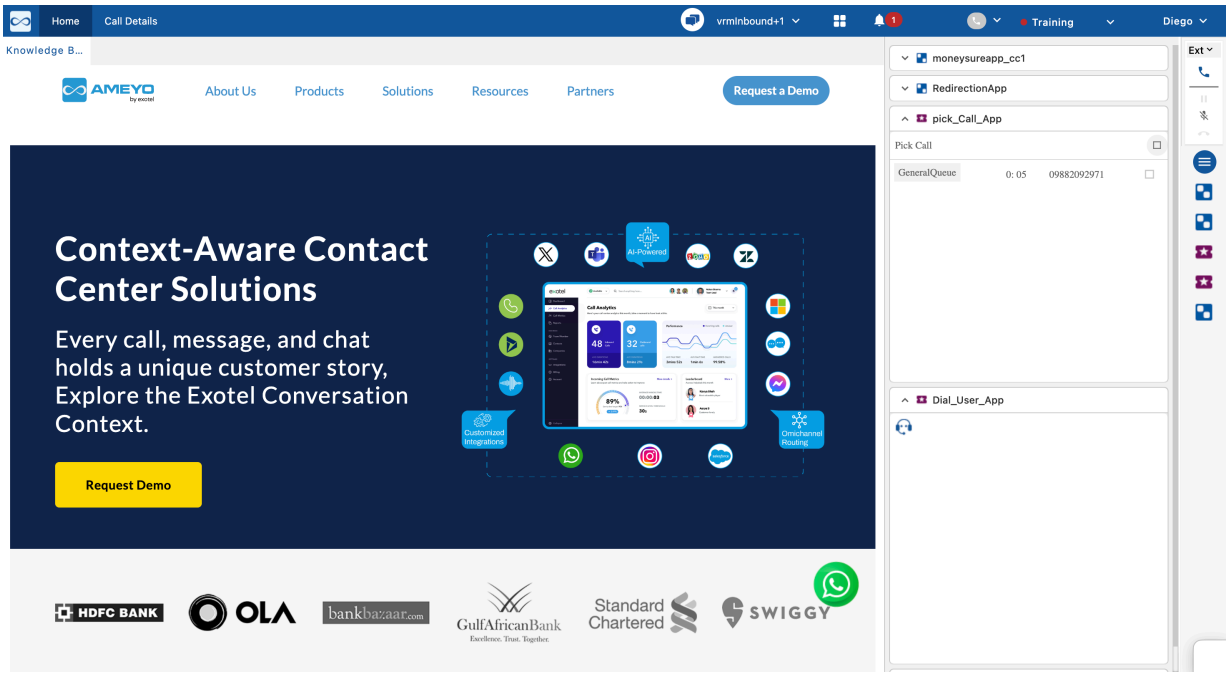
Description | How to Install and Configure

What is this App?

The **Pick Call App** is a side-panel widget that visualizes the voice queue. Instead of blindly waiting for the next call, agents and supervisors can see exactly who is waiting.

It displays a list of ringing calls with key details:

- **Customer:** Name or Phone Number.
- **Queue:** The Campaign or Queue name the caller is in.
- **Duration:** How long the customer has been waiting.
- **Priority:** The priority level assigned to the call.



Why Use This App?

Standard ACD (Automatic Call Distribution) routes calls based on "First-In, First-Out." However, business needs often require flexibility. This app solves:

- **VIP Handling:** Identify high-value clients in the queue and answer them immediately, regardless of their wait time.
- **Urgency Management:** Allow supervisors to "cherry-pick" critical cases that need immediate resolution.
- **Queue Visibility:** Gives agents context on the queue load before they even take a call.

Who is this App for?

This app is for Agent and Supervisor user role.

Impact & Key Benefits

- **For Agents:** Empowerment to manage their workflow and assist specific customers they may have a prior relationship with.
- **For Supervisors:** Ability to intervene and clear bottlenecks by picking difficult or long-waiting calls manually.

- **For Business:** Improved SLA for high-priority customers by bypassing standard routing rules.

Prerequisites

Before installing, please ensure you meet the following requirements:

- Access to the Ameyo contact center system and IT administrator role.
- The Ameyo App Installer (App Manager in Admin panel) must be set up and configured first. See **App Manager** documentation.

> **Note: This app is only for Executive (agent) user role and Not for Professional (agent) user role.**

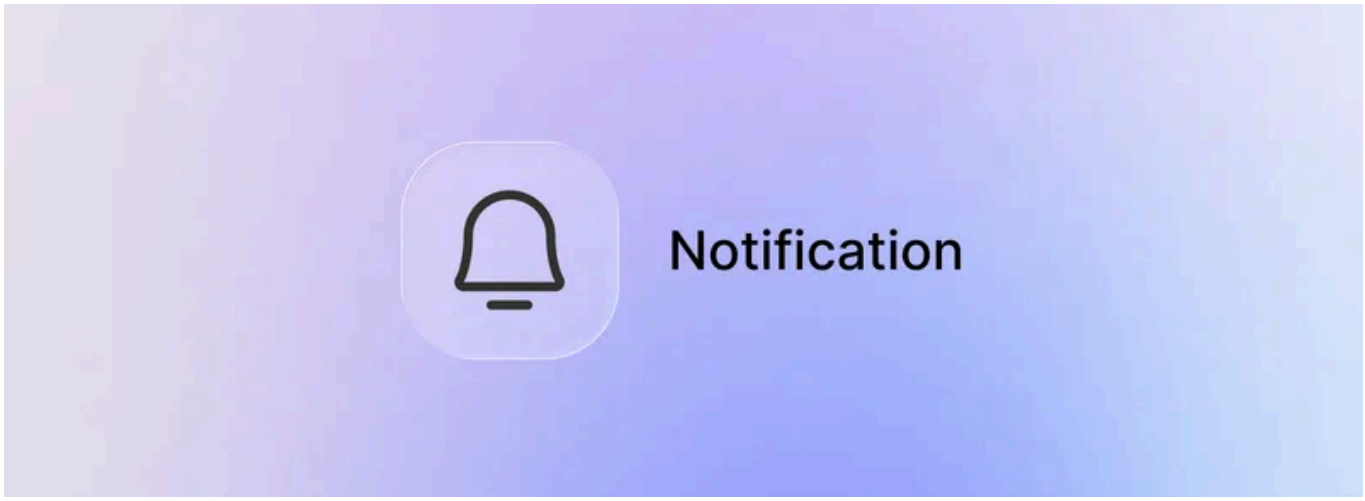
Summary

The **Pick Call App** transforms queue management from passive to active. By allowing agents and supervisors to visualize wait times and priorities, it enables "cherry-picking" strategies that ensure VIPs and critical issues are addressed instantly, bypassing standard routing delays.

3.4.3. Notification App

Never miss a conversation, even when your browser is minimized

⬇ Download App



Description | How to Install and Configure

What is This App?

The **Desktop Notification App** is a background utility designed to keep agents connected to incoming traffic (Calls and External Chats) even when they are multitasking. By leveraging the browser's native notification permissions, it ensures that alerts break through the clutter of open tabs or minimized windows.

Why Use This App?

In a busy contact center, agents often work on multiple software applications or secondary browser tabs simultaneously. This leads to:

- **Missed Interactions:** Agents may not hear the ring or see the visual cue inside Ameyo if the tab is not in focus.
- **SLA Breaches:** Delayed responses to incoming chats can lower service levels.

This app solves these issues by pushing a static "Incoming Call/Chat" message directly to the Operating System's notification center.

Who is this App for?

This app is for Agent and Supervisor user role.

Key Capabilities

- **Background Alerting:** Detects when the agent is on a secondary tab or using different software and triggers a popup.
- **One-Click Focus:** Clicking the notification automatically opens or maximizes the Ameyo screen (Primary Tab) so the agent can attend the interaction immediately.
- **Chat Persistence:** If the agent does not click the initial notification, it will continue to display incoming messages from the customer to ensure urgency is conveyed.
- **OS Integration:** On operating systems like **Windows 10**, these alerts appear in the native **Message Center/Action Center**, ensuring they are highly visible and consistent with the user's workflow.

Prerequisites

Before installing, please ensure you meet the following requirements:

- **Ameyo App Installer:** The App Manager must be installed and configured.
- **Browser Permissions:** Agents must "Allow" notification permissions for the Ameyo URL in their browser settings for this app to function.

Summary

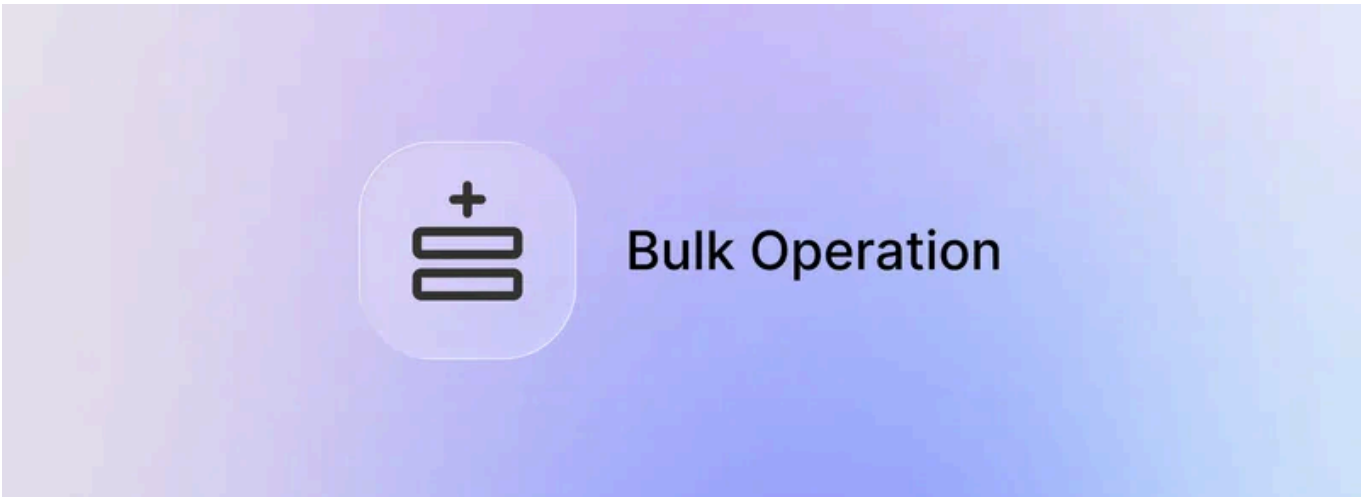
The **Notification App** eliminates communication latency in the contact center. By allowing management to broadcast instant, high-visibility alerts to agent screens, it ensures that critical operational updates, downtime warnings, and compliance instructions are received and acted upon immediately.

3.5. Workflow and Productivity

3.5.1. Bulk Operation App

Use mass updates to organize your helpdesk instantly

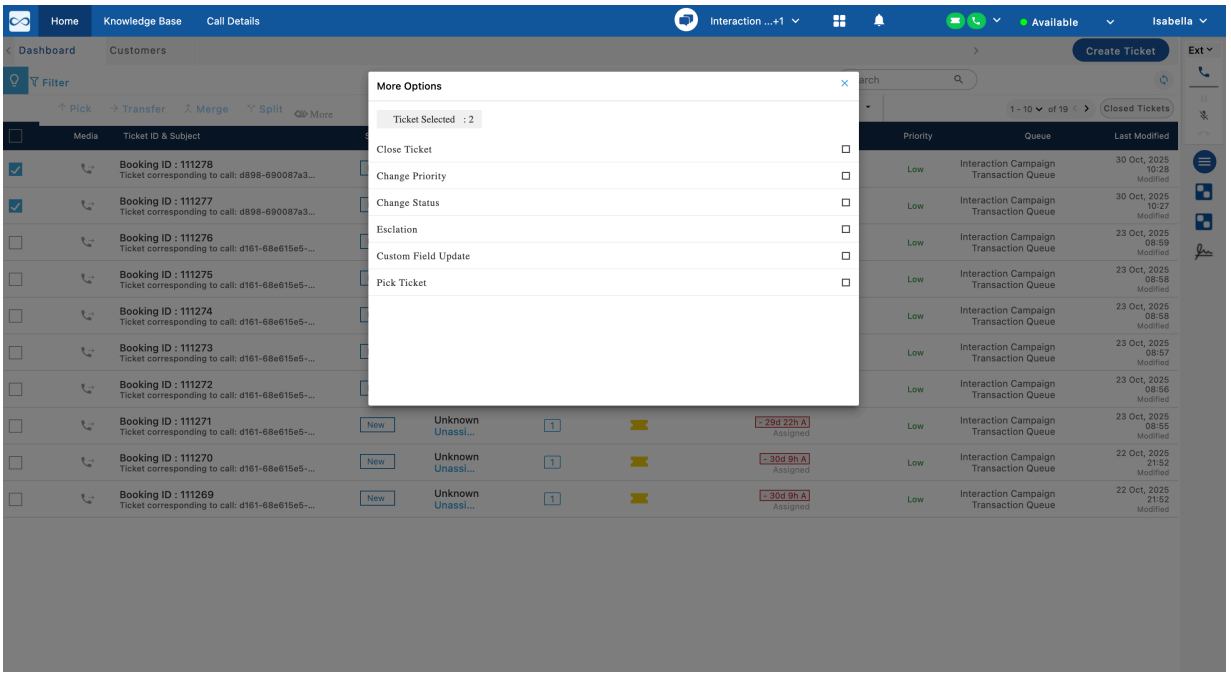
⬇ Download App



Description | How to Install and Configure

What is this App?

The **Bulk Ticket Actions App** is a productivity accelerator designed for Ameyo Agents and Supervisors. It integrates into the ticketing interface, allowing users to select multiple tickets simultaneously and apply changes to them in a single click. Instead of opening tickets one by one, users can modify statuses, priorities, custom fields, or trigger escalations for a whole batch at once.



Why Use This App?

In a high-volume support environment, updating tickets individually is slow and inefficient. This app solves:

- **Backlog Fatigue:** Eliminates the repetitive manual clicking required to close or update multiple tickets that require the same action.
- **Incident Management:** Allows supervisors to quickly escalate or reprioritize a group of related tickets (e.g., during a specific outage) instantly.
- **Data Consistency:** Ensures that a batch of tickets receives the exact same update (e.g., Status or Custom Field change) without human error.

Who is this App for?

This app is for Agent and Supervisor user role.

Impact & Key Benefits

- **For Agents:** Clear backlogs faster by updating status, priority, or custom fields for multiple tickets in one go.
- **For Supervisors:** Streamline queue management by bulk-closing resolved issues or mass-escalating critical incidents instantly.

- **For Business:** Drastically reduce administrative time, allowing the team to focus on solving complex issues rather than data entry.

Prerequisites

Before installing, please ensure you meet the following requirements:

- Access to the Ameyo contact center system with IT administrator access
- The Ameyo App Installer (App Manager in Admin panel) must be set up and configured first. See **App Manager** documentation.

Summary

The **Bulk Operation App** streamlines helpdesk operations by enabling **Agents and Supervisors** (logged into their workbench) to perform mass updates on their ticket queues. With capabilities to **Bulk Close, Escalate, and Modify Priority or Status**, it drastically reduces administrative time and ensures the ticket backlog remains clean and organized.

3.5.2. Quota Management App

An administrative governance tool that allows Administrators and Supervisors to define specific lead limits for campaigns. Once the defined quota is reached, the system automatically blocks further lead uploads for that campaign.

Starting from version 4.13, **Supervisor** users also have access to the Quota Management App, enabling them to view and manage quotas for the campaigns they are assigned to.

Use campaign limits to control lead volume automatically

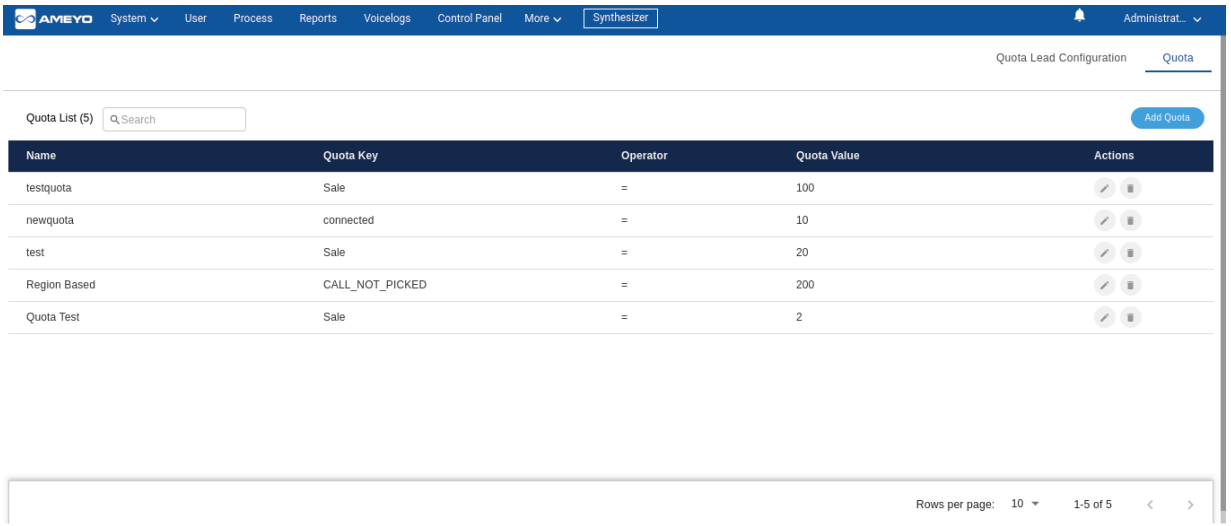
⬇ Download App



Description | How to Install and Configure

What is This App?

The **Quota Management App** is a system control utility designed for Administrators. It introduces a logic layer to the lead management process by allowing Admins to define a maximum "Quota Limit" for any specific campaign. If a user attempts to upload leads that exceed this limit, the system throws an error and prevents the upload.



Why Use This App?

Managing lead volumes manually can be prone to errors, resulting in overloaded campaigns or violations of client contracts. This app solves:

- **Over-provisioning:** Prevents users from uploading more leads than a campaign requires or is allocated.
- **Automated Gatekeeping:** Instead of manually checking current lead counts before every upload, the system enforces the limit automatically.
- **Data Hygiene:** Keeps campaign databases within manageable sizes to ensure optimal performance.

Impact & Key Benefits

- **For Admins:** Simplifies database management by preventing data dumps that exceed operational capacity.
- **For Operations:** Ensures campaigns stay within their specific targets or contracted limits without manual oversight.
- **For Business:** Prevents wasted resources on excess leads that cannot be dialed.

Prerequisites

Before installing, please ensure you meet the following requirements:

- **App Manager (App Installer Configuration):** The **Ameyo App Installer** must be installed and configured first, as this app runs on that framework.
- **User Role:** IT Administrator access is required for installation and configuration.

- Supervisor Should be assigned to the campaign in which the lead is assigned to perform any operation on that lead

Summary

The **Quota Management App** acts as an automated gatekeeper for your campaign databases. By allowing Administrators to set hard limits on lead quantities, it ensures that new leads are not uploaded once a campaign's capacity has been reached, maintaining data hygiene and operational limits.

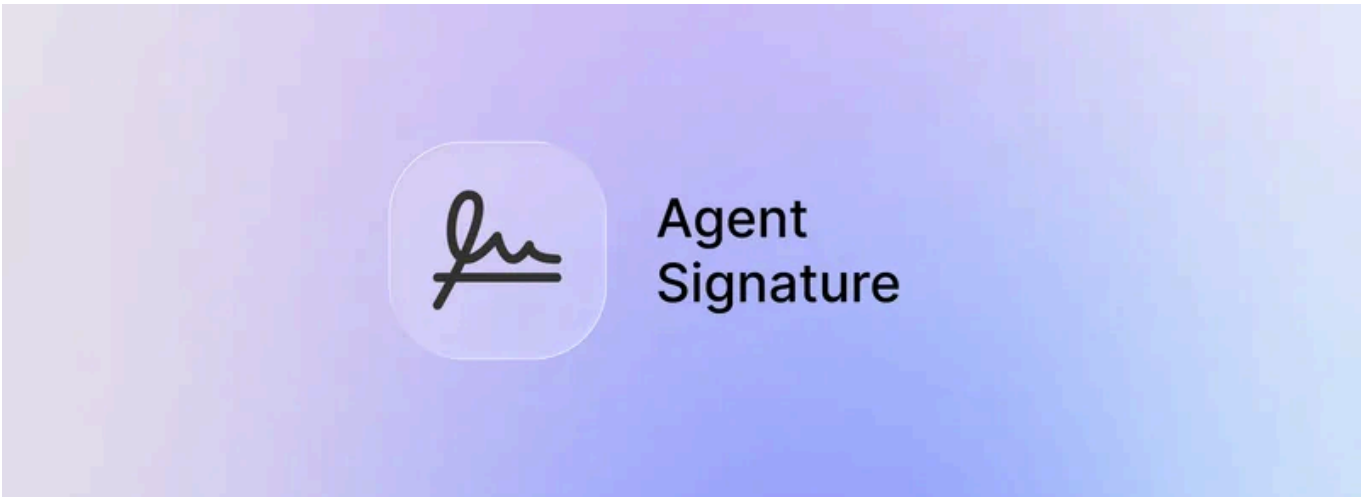
Version History

Version	Enhancement	Release Notes
4.13	Supervisor role gains access to Quota Management	

3.5.3. Agent Signature App

Use automated signatures to professionalize every email interaction

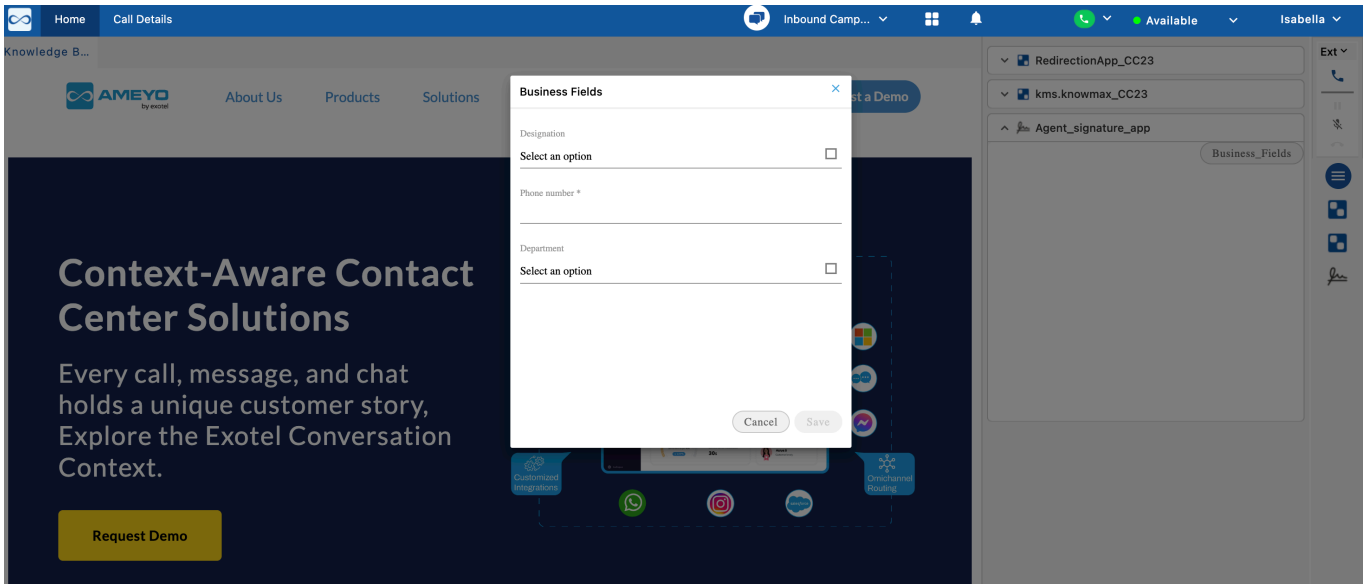
⬇ Download App



Description | How to Install and Configure

What is This App?

The **Agent Signature App** is an email utility integrated into the Agent Toolbar. It provides a dedicated interface for agents to define their professional sign-off. Once configured, this signature is automatically appended to the email body whenever the agent composes a new message.



Why Use This App?

In a high-volume contact center, typing out contact details and closing salutations for every email is inefficient and leads to inconsistency. This app solves:

- **Inconsistent Branding:** Ensures every email sent from your center adheres to a professional standard.
- **Repetitive Effort:** Removes the need for agents to manually type their name and designation for every interaction.

Who is this App for?

This app is for Agent user role.

Impact & Key Benefits

- **For Agents:** Saves time and reduces typing effort during email interactions.
- **For Business:** Ensures a standardized, professional look and feel for all customer-facing communications.

Prerequisites

Before installing, ensure the following requirements are met:

- **Ameyo Version:** Requires **Ameyo version 4.0.0** or higher.
- **App Manager:** The **Ameyo App Installer** must be installed and configured.
- **User Role:** IT Administrator access is required for installation; Agents require access to the app on their interface to use it.

Summary

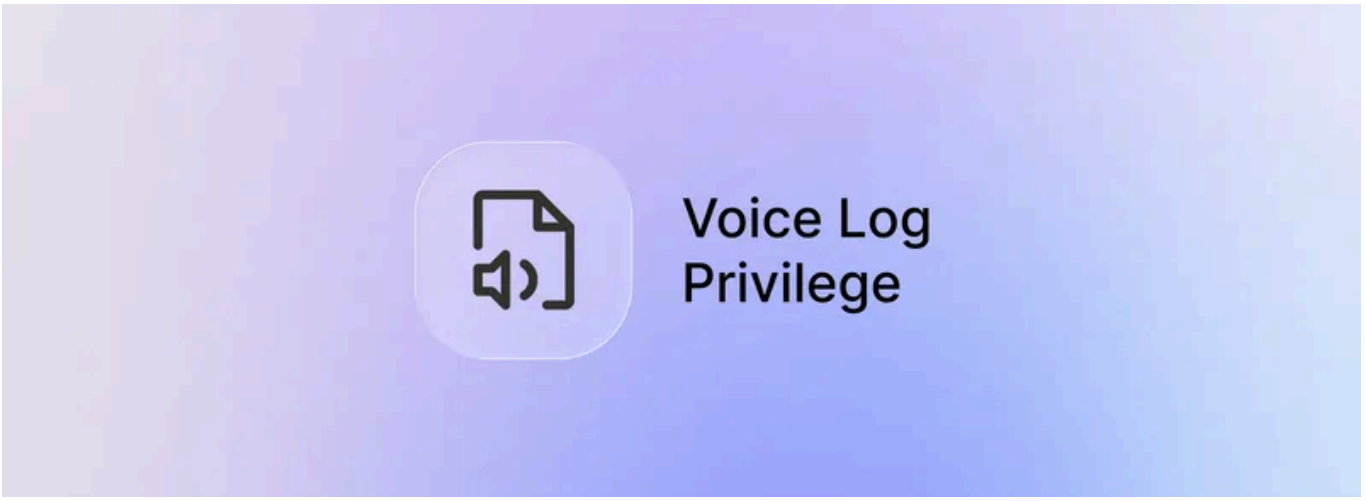
The **Agent Signature App** is a simple yet essential tool for email-based support teams. By automating the insertion of agent signatures, it ensures consistency, professionalism, and efficiency in every written interaction.

3.6. Security and Compliance

3.6.1. Voice Log Privilege App

Empower your workforce to listen, learn, and improve instantly—**with secure, self-service access.**

⬇ Download App



Description | How to Install and Configure

What is This App?

The **Voice Log Privilege App** manages user and role-based privileges for accessing voice logs/recordings. This app enables fine-grained control over who can view or download call recordings. By default, voice logs (recordings) are often restricted to Supervisors or Administrators. This app bridges that gap, providing a secure interface for agents to retrieve their specific call history.

It provides two main functions for the permissable user roles:

1. **Listen:** Playback of call recordings.
2. **Download:** Saving call recording files locally.

Why Use This App?

In standard operations, agents often lack visibility into their past interactions. This app solves:

- **Feedback Delays:** Agents no longer need to wait for a Quality Analyst (QA) or Supervisor to review a call to hear how they sounded.
- **Administrative Bottlenecks:** Reduces the workload on Supervisors who previously had to manually retrieve recordings for agents upon request.

Who is this App for?

This app is for Agent and Supervisor user role.

Impact & Key Benefits

- **For Agents:** Empowerment to self-correct and review complex interactions immediately after they happen.
- **For Supervisors:** Frees up time by removing the need to act as a "gatekeeper" for call recordings.
- **For Business:** Accelerates training and improves quality assurance scores through self-learning.

Prerequisites

Before installing, please ensure your environment meets the following requirements.

- **System Requirements:**
  - **Ameyo Version:** Requires **Ameyo version 4.0.0** or higher.
  - **App Framework:** The **Ameyo App Installer** must be installed and active.
- **User Role:** You must be an **IT Administrator** to install and configure this app.
- **Server Configuration:**
  - **Timezone Sync:** The server's PHP timezone settings must be correctly configured to match your local region (e.g., 'Asia/Kolkata'). This ensures all recording timestamps are accurate.

> Note: This is a backend configuration. Please contact your **Customer Success Manager** or **Exotel Support** to get this setting done.

Summary

The **Voice Log Privilege App** decentralizes access to call data. By safely granting users the right to listen to and download their own voice logs, it fosters a culture of transparency and self-improvement within the contact center.

Support and Troubleshooting

- Validate slot mappings match your Ameyo version and roles.
- Check user privileges and role assignments for app access.
- For issues with real-time data or display, check service status and review logs.
- To get the backend server configurations done, contact Ameyo support or your customer success manager.

4. Inbound Voice Capabilities (IVR and ACD)

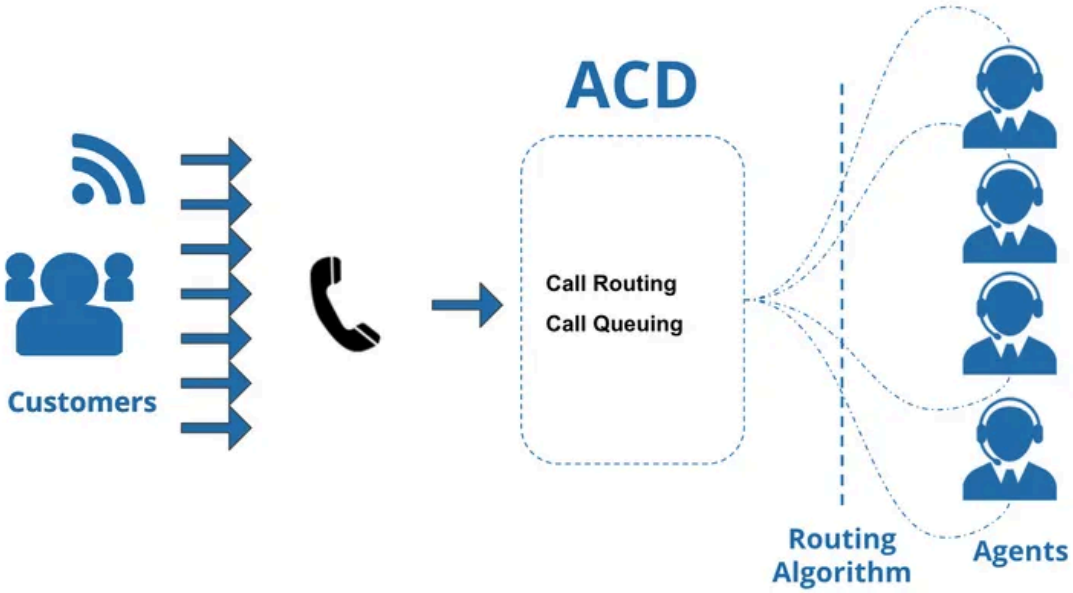
4.1. Inbound features

4.1.1. Inbound Routing Strategies /Automatic Call Distributor

Overview

The Automatic Call Distributor (ACD) is an intelligent mechanism designed to streamline high-volume inbound processes. Its primary function is to route incoming calls to the most suitable agent who can address the caller's specific needs appropriately.

By eliminating the dependence on traditional PBX systems and manual intervention, the ACD ensures smooth call routing, reduces call abandonment, and optimizes resource utilization.



Robust Routing Capabilities (in voice campaign)

The ACD system offers flexible algorithms that can be customized based on CRM data, IVR selection, business hours, and agent skills. The core routing strategies include:

1. Skill based routing (SBR)

This logic connects callers to the best-suited agent based on the agent's specific skills and level of expertise.

- **Benefit:** Ensures agents only handle queries within their purview, reducing frustration and improving resolution quality.
- **Use cases/Example:**
  - Language-based skill routing: When a customer chooses a preferred language (for example, English or Spanish), the system routes the call to the available agent with the highest skill rating in that language. Lower-rated agents receive calls only when higher-skilled agents are busy, ensuring better call outcomes and efficient use of agent capacity.
  - Multi-skilled agent priority: If an agent has multiple language skills but is stronger in one (for example, Spanish over English), the system prioritizes routing calls that match their strongest skill. The agent will handle other skill queues only when there are no pending calls in their primary skill, or when doing so is necessary to meet SLA commitments.

2. Queue-based Routing

Queue-based routing focuses on routing calls to queues (teams) based on queue-level priority instead of individual agent skills. Queues typically represent different groups, such as senior vs. junior agents or separate departments.

- **How it works:** You create different queues (e.g., "Expert Team," "General Support") and assign them priority levels. The system offers calls to the highest-priority queue first.
- **Best for:** Managing tiered support teams or specialized departments.
- **Example:** A call is first routed to the "Senior Agents Queue" (Priority 1) to ensure high-quality resolution. If all senior agents are busy, the call automatically overflows to the "General Support Queue" (Priority 2) to minimize wait times.

3.Preferred Agent Routing

Often referred to as "Sticky Agent" logic, this routes the caller to the specific agent they spoke with previously.

- **Configuration:** The system checks for interactions within a configurable amount of time to ensure continuity.

4. Priority-Based Routing

A Priority-based routing in a voice call campaign is based upon the priority given to the calls initiated by the customers. It means that the calls which are more important for the business gets priority and answered first than to the calls with less priority.

- **Best for:** Prioritizing high-value calls or urgent inquiries.
- **How it works:** Priority is assigned to the *call itself* based on the customer type or the IVR selection (e.g., Sales vs. Support). Higher priority calls jump ahead of lower priority calls in the waiting line.
- **Example:** A "Sales" call (Priority 1) will be answered before a "General Inquiry" call (Priority 2), even if the general inquiry caller has been waiting longer. This ensures revenue-generating or critical calls are never delayed.

5. Run-Time Queue Changes

Design workflows that seamlessly route a caller from one queue to another.

- **User Experience:** The transfer happens without any break or additional wait time for the caller.

Operational Advantages

Implementing an intelligent ACD mechanism addresses common challenges such as frequent transfers, long hold times, and scalability restrictions.

Increased Agent Productivity

- **Reduced AHT:** Agents handle calls they are specifically trained for and have subject knowledge on, which significantly reduces Average Handling Time (AHT).
- **Effective Utilization:** Prevents ineffective resource utilization by matching demand with the right supply of skills.

Improved First Call Resolution (FCR)

- **Accuracy:** Routing to the right agent ensures a faster and more accurate response.
- **Efficiency:** Higher FCR is achieved by removing the need to transfer calls between different departments.

Streamlined Operations & Scalability

- **Integration:** The system supports easy integration to enable call conferencing and transfers with real-time customer data.
- **Instant Scalability:** There is no requirement for additional hardware or IT involvement to scale up or down instantly (up to a certain limit of call volume).
- **Reduced Costs:** By achieving higher FCR and reducing transfer times, overall call center costs are reduced.

Routing in a Voice Campaign (from Administrator interface)

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

Campaign.

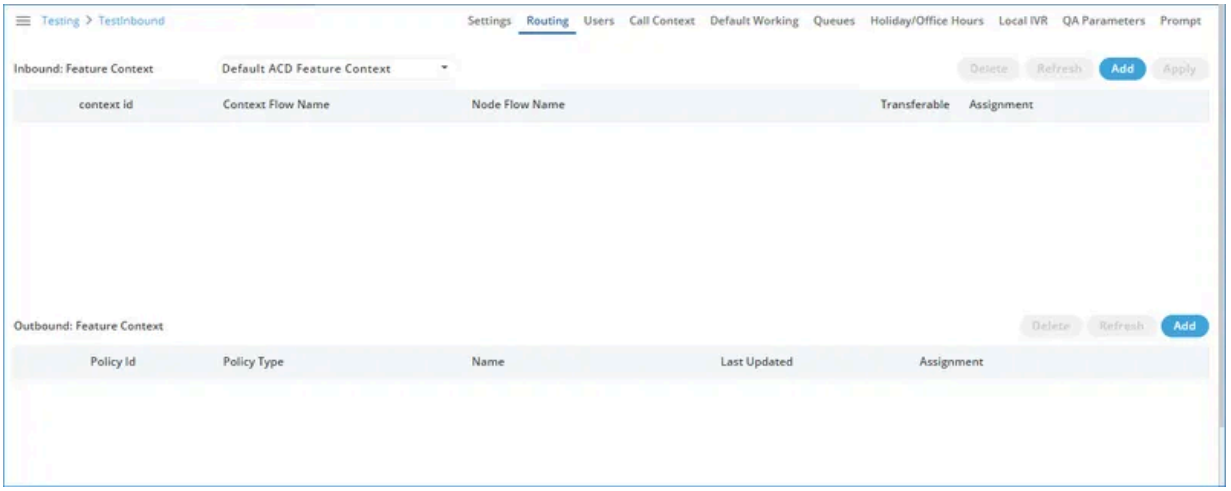


Figure: Routing

Routing for Inbound

1. Add a Nodeflow for Routing

Perform the following steps to create a nodeflow.

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



Figure: Add Context Flow

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

> Service Engineer will provide you the required nodeflow files.

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

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

2. Assign Nodeflow to a Queue

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

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

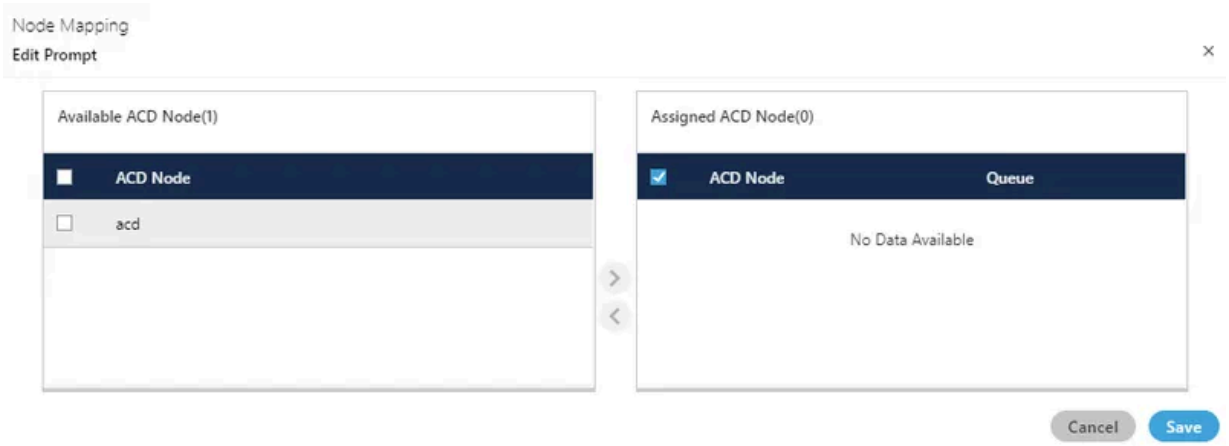


Figure: Assign Nodeflow to a Queue

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

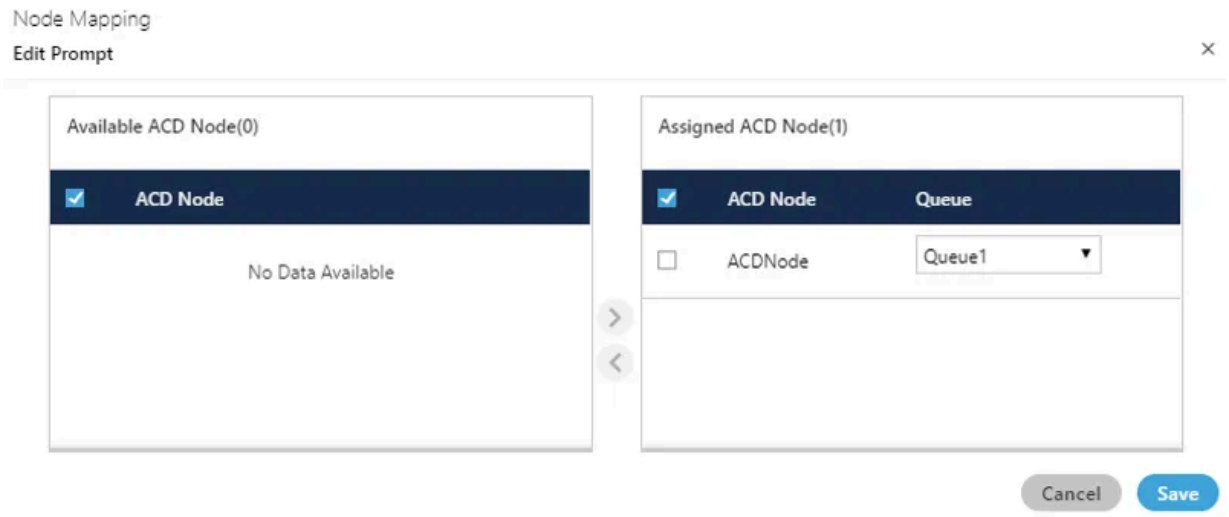


Figure: Assign Queue in ACDNode

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

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

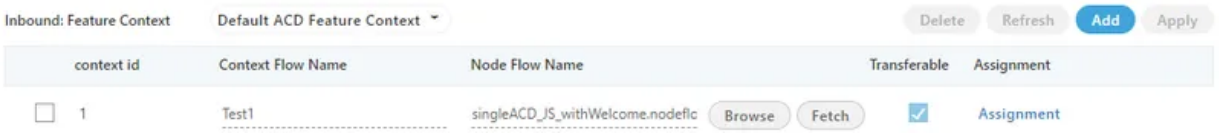


Figure: Added Nodeflows

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

3. Delete Routing Policy

- Select the Routing Policy for which you want to delete permanently. Click "Delete" button. A confirmation pop-up comes up. Click "Yes" if you want to delete the routing policy, else click "No".

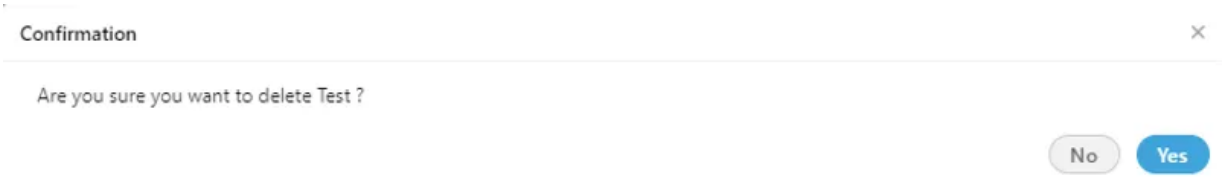


Figure: Delete Routing Policies

4.1.1.1. Skill Based Routing and Skill management

Overview

Skill-based routing (SBR) is a core component of the Automatic Call Distributor (ACD) system. It is designed to filter and direct incoming inquiries to the call center agents possessing the most applicable **skill sets**. By routing calls to the most qualified agents, callers get quicker resolutions and shorter wait times, reducing Average Handle Time. Specialized training minimizes onboarding needs, while skilled agents can focus on key clients, improving resource allocation, lowering abandonment rates, and boosting overall efficiency.

How It Works

The system routes calls to agents who possess the required skill. Calls are prioritized and offered first to agents with a higher proficiency level in that skill.

Key Benefits

- **Customer Experience Improvement:** Provides an immediate connection to the most qualified agent, significantly reducing friction points and enhancing customer satisfaction.
- **Reduced Handling Time:** By closely matching calls to the best-prepared agent, callers experience faster issue resolution, thus reducing the **Average Handle Time (AHT)**.
- **Targeted Training & Efficiency:** Agents focus on specific skill sets, increasing their utilization and productivity within those domains. This specialization leads to reduced call abandon rates and a more efficient call center operation overall.
- **Resource Prioritization:** Highly-skilled agents can be strategically assigned to high-value clients or complex queues, ensuring critical resources are targeted where they provide the most return for the call center.
- **Flexible Setup:** Different skills can be created as per the requirements of different **Queues** or **DIDs (Direct Inward Dialing)**, offering granular control over resource allocation.

Functionality

Skill Management is configured under the **System Configuration** in the Administrator/Voice-Admin consoles. The feature allows for the creation of skills, definition of skill levels with corresponding weightages, and the assignment of users to specific skills for use in skill-based call routing.

- **Skills:** A skill is created with a unique name (e.g., "Spanish Language Support," "Tier 2 Technical").
- **Skill Levels:** Each skill can have multiple defined levels, each assigned a specific **weightage** (e.g., Level 1: Weightage 5, Level 5: Weightage 100) to prioritize agents.
- **User Management:** Users are assigned to a skill and a level via a management interface.

Maintenance Constraint

Once a skill is created, **it cannot be edited**; it must be deleted and re-created to apply modifications to the skill name or defined levels. However, user assignments and the management of skill levels can still be performed on an existing skill.

Use Cases

- **Multi-Language Support:** Routing all calls from customers who select Spanish in the IVR directly to agents with the "Spanish Language" skill.
- **Product Tiering:** Directing calls about Product A to agents with the "Product A Specialist" skill, while directing complex technical issues to agents with "Tier 3 Troubleshooting" skill.
- **Sales vs. Support:** Using a skill to differentiate agents who handle **Sales Inquiries** (high conversion skills) from those who handle **Technical Support** (high resolution skills).

Prerequisites

1. **Licensing:** This feature is a **Licensed Feature** and requires the appropriate license component to be available and visible in the user interface for configuration.
2. **IVR Configuration:** The implementation of skill-based routing requires changes to the **Interactive Voice Response (IVR)** flow to capture the customer's intent (e.g., product

issue, language preference) which is then used by the ACD to match the call with the appropriate agent skill.

3. **Professional Services Involvement:** Due to the complexity of integrating skill capture in the IVR and configuring the underlying ACD logic, **Professional Services** involvement is typically required to ensure correct deployment and optimal routing configuration.
4. **Routing Configuration:** Skills must be applied to a **Queue** while editing the queue settings in any campaign for skill-based routing to function.

Usage Instructions

At Administrator level (Changed System Configuration After Creating Campaign)

Creating a Skill and Levels

- Navigate to the **Skills Tab** (located under System Configuration).

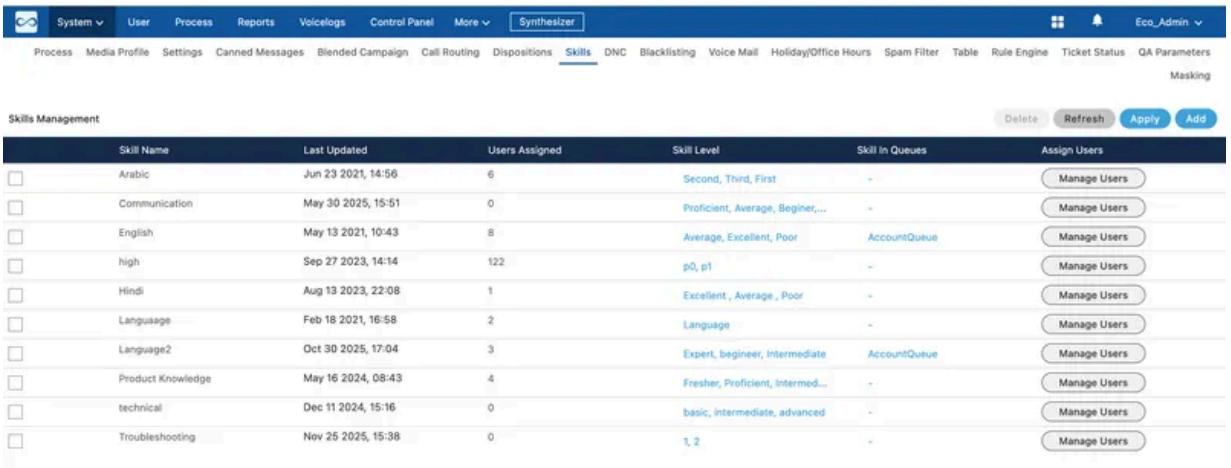


Figure: Skills Tab

- Enter Skill name and define skill levels by clicking **"Add Skill Level"**. Here, click **"Add"** button to add a skill level. Enter the name of skill level and its weightage.

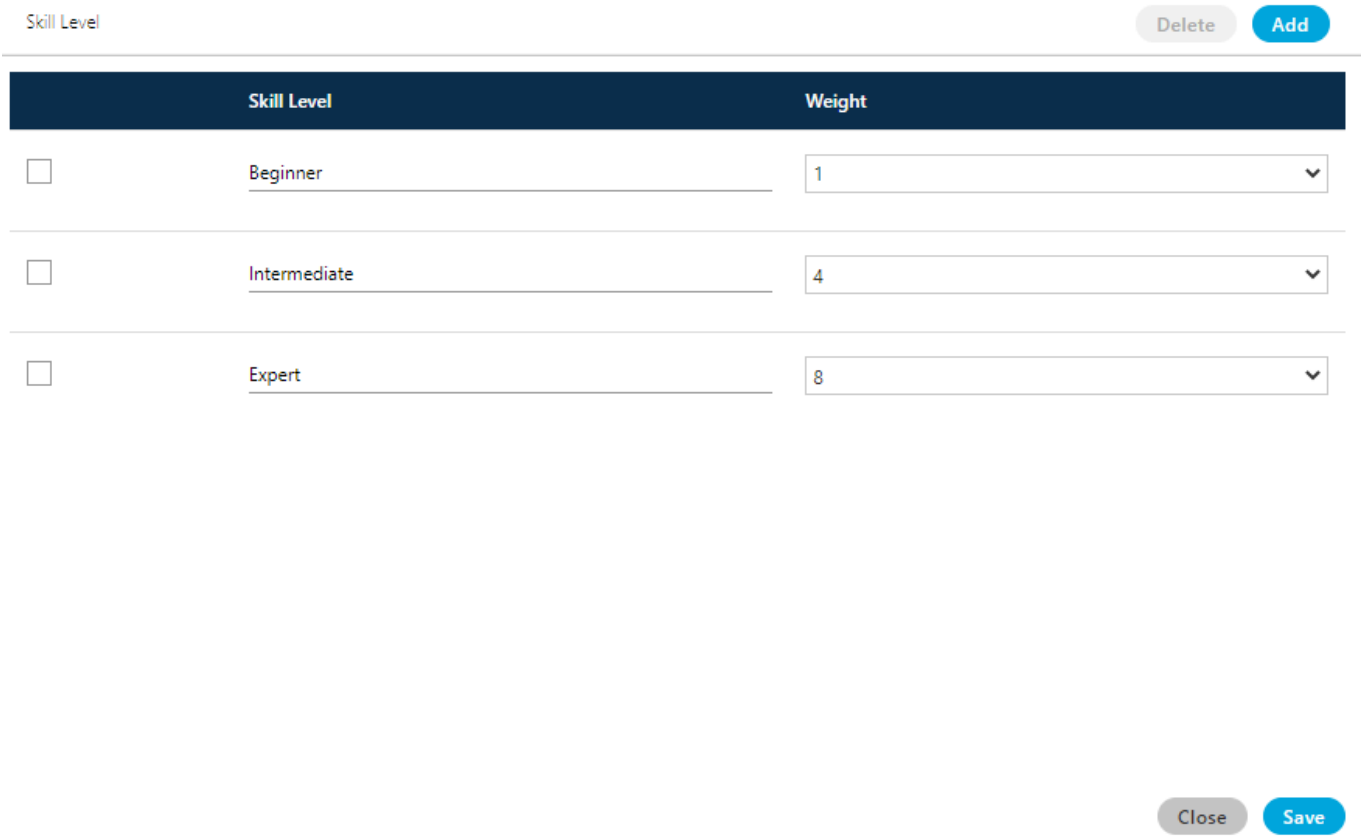


Figure: Adding Skill Levels

- In the pop-up, click **"Add"** to create a level, enter the **name** of the skill level, and define its **weightage**. Click **"Save"** to save the defined skill levels.
- Click **"Apply"** in the main Skills tab to apply the newly created skill to the system.

Assigning Users to a Skill

- In the **Skills Tab**, select the desired skill and click the **"Manage Users"** button.

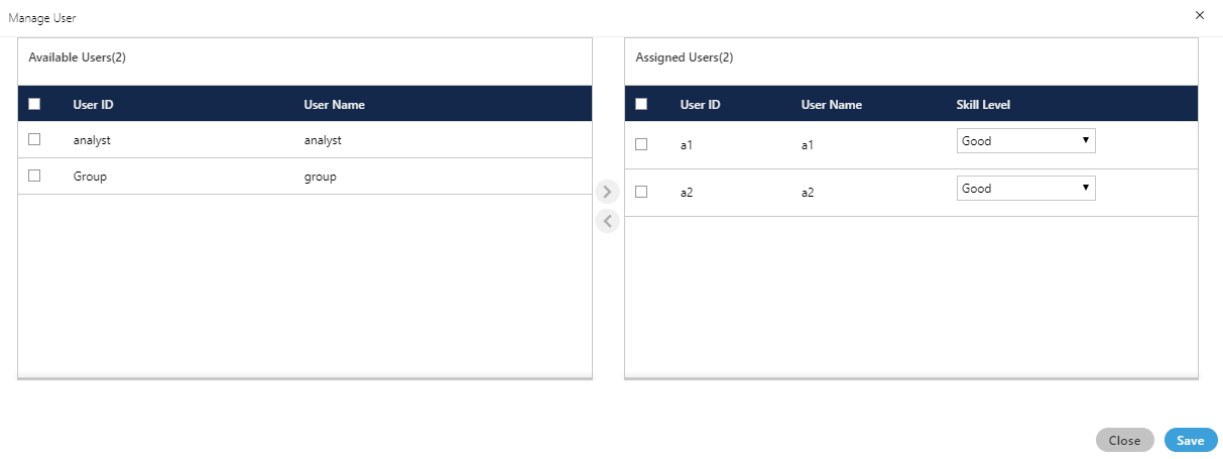


Figure: Manage Users

- Select the users from the **"Available"** section.

- Click the **">"** icon to move them to the **"Assigned"** section.
- To remove users, select them in the **"Assigned"** section and click the **"<"** icon.
- Click **"Save"** to commit the changes to user assignments.

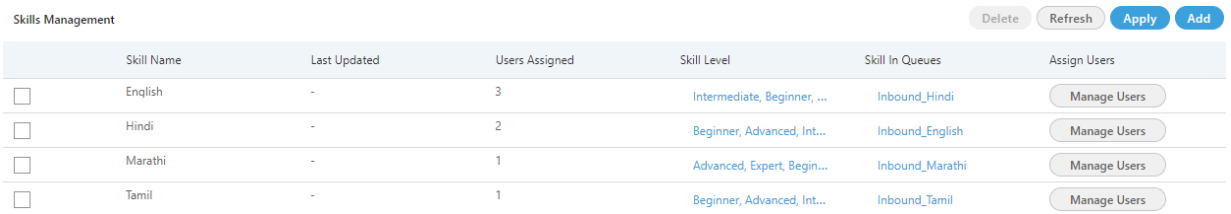


Figure: Added Skills

Assign Skills to Queues

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

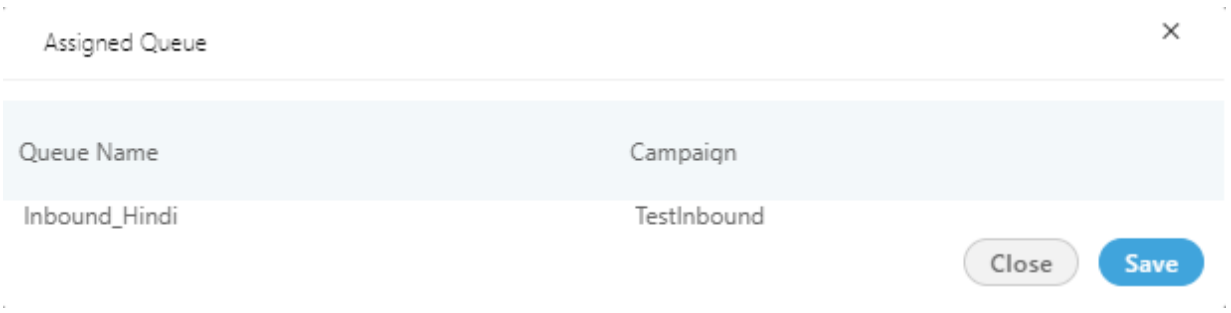


Figure: List of Queues

- Click **"Apply"** to apply the changes.
  Rather, you can click "Refresh" to discard the changes. You can add multiple skills here.

Set Scheduler Type

- The queue must be configured to use skill-based logic. In the queue management tab (either in Administrator intrface of Supervisor interface), select Skill Based from the **Queue Management** dropdown menu.

Deleting a Skill

- Select the skill you wish to delete from the list.



Figure: Delete the Skill

- Click the **"Delete"** button.
- A confirmation prompt will appear. Click **"Yes"** to confirm deletion.

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

Related Features/Modules

- **Call Routing/Queue Management:** Skills are fundamentally linked to , a routing type where calls are offered based on the agent's defined skill set and level. Skills must be assigned to a **Queue** for SBR to be utilized as detailed out below (skill based routing in a voice campaign).
- **Agent Monitoring:** Supervisors can monitor agent activity and call distribution based on skills within the monitoring tabs, allowing them to track the performance and utilization of skill groups.

Skill-based Call Routing in a Voice Campaign

Perform the following steps to route your call according to skills defined.

1. Add the skill category, skill levels, and assign skills to the agents.

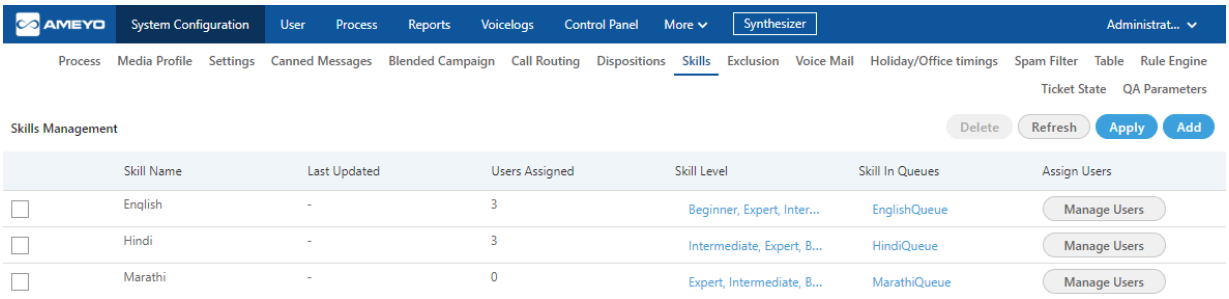


Figure: Added Skills

2. In "Process" Tab, select "Inbound Campaign" and go to "Queues" Tab. Create the queues as per the defined skills.

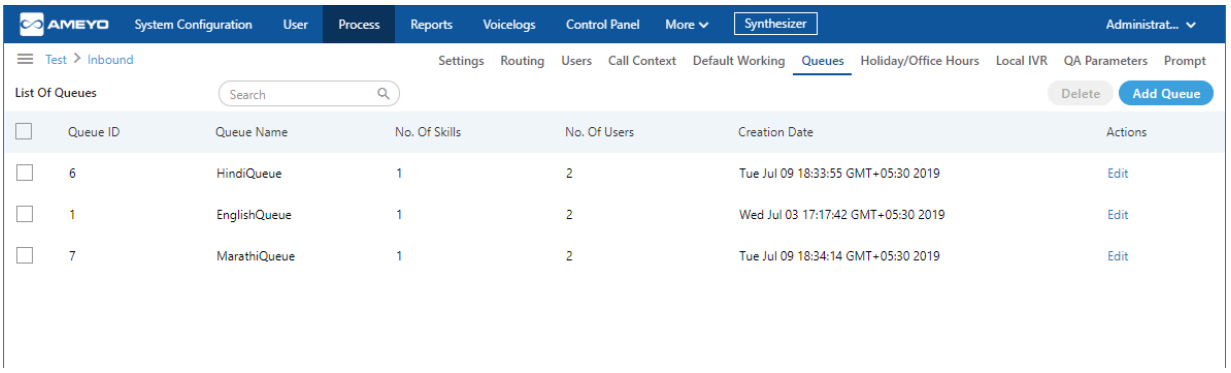


Figure: Assign Queues

3. Now, assign the skills in the queue.

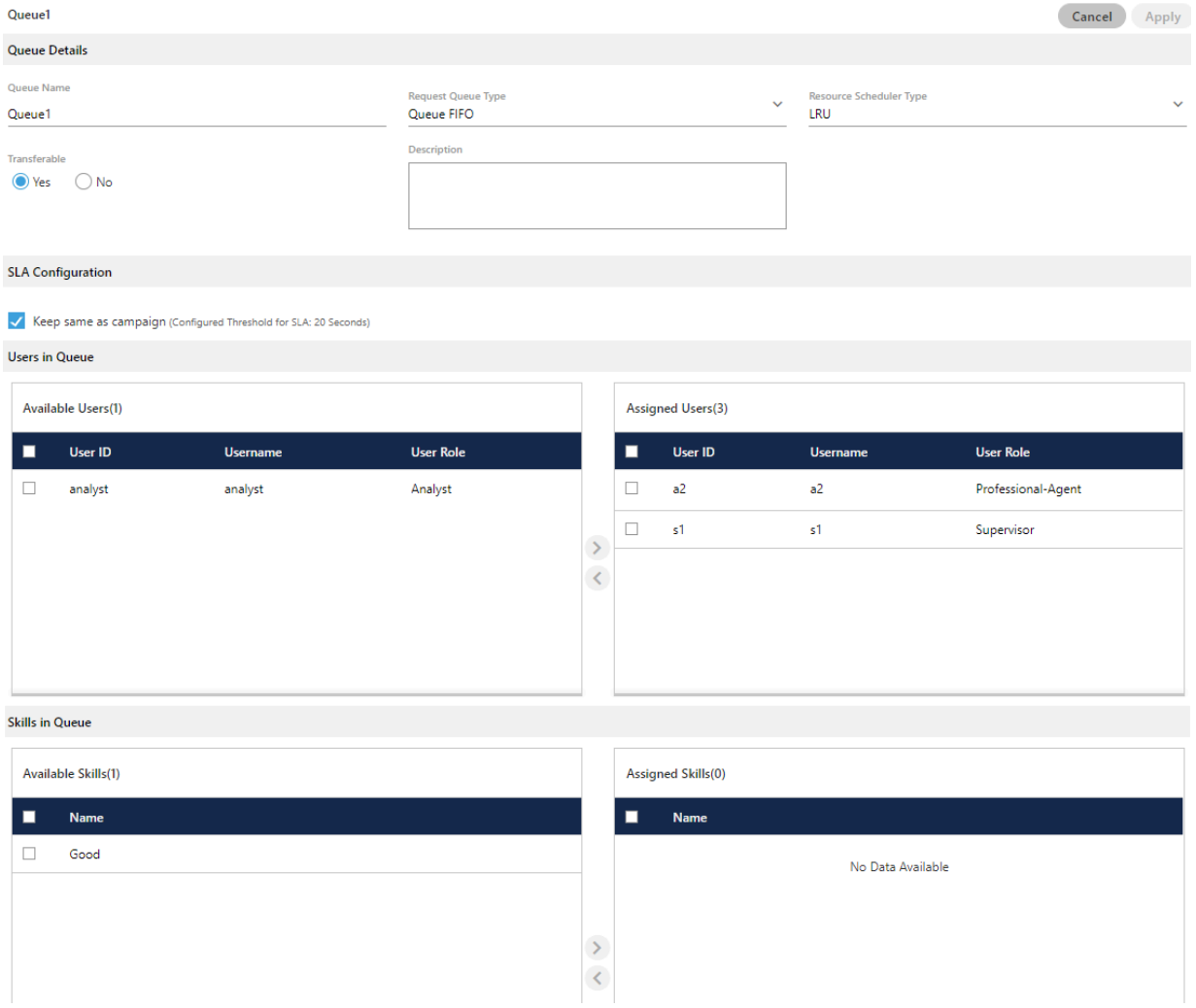


Figure: Assign Skills to Queue

4. Create the routing for the skills which you have created. Assign the ACD Node and the queues corresponding to the skills.

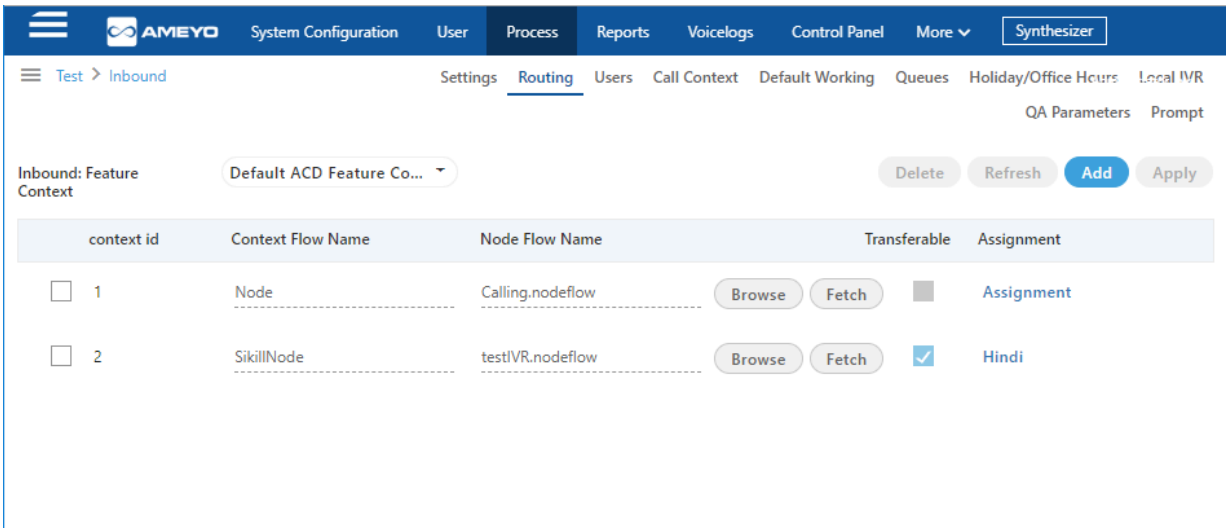


Figure: Assign Routing

> Do not delete the old routing nodeflows created earlier rather add the new nodeflows.

5. Again switch the tab to the skills in System configuration menu and click "Skill in Queues" column.
6. Assign the queue to the corresponding skill levels.

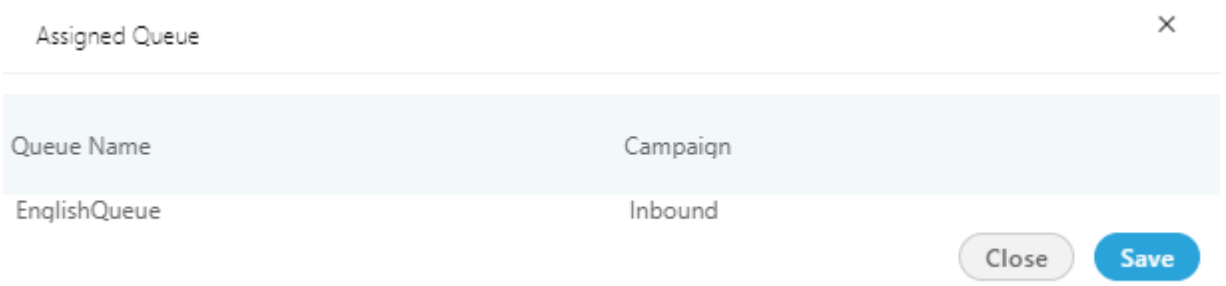


Figure: Assign the Queue

7. Now, go to the inbound campaign and switch the tab to the "Prompt". Here, you have to add the prompt from which the customer has to select the skill level, so that the calls gets to route according to the defined skills.

Example: In this test case, we are using three skills for routing, that is, English, Hindi, and Marathi. In the Voice Prompt, the English queue is assigned to number 1, Hindi queue is assigned to number 2, and Marathi queue is assigned to number 3.Now, if the customer presses 1, then the call will be routed to the English queue, if customer presses 2 then the call will be routed to Hindi queue, and if the customer presses number 3 then the call will be routed to Marathi queue.

The agents with the higher skills will receive the call first and then the agents with lower skills get the calls only if the higher skilled agents are not free to take the call.

Privileges

Privilege	Purpose
`contactcenter:dacx-cc.admin.skill-mgmt.view-skill:invoke-access`	View the Skills tab and the list of configured skills.
`contactcenter:dacx-cc.admin.skill-mgmt.add-skill:invoke-access`	Create a new skill and its skill levels.
`contactcenter:dacx-cc.admin.skill-mgmt.modify-skill:invoke-access`	Edit skill levels, weightages, and user assignments.
`contactcenter:dacx-cc.admin.skill-mgmt.rem-skill:invoke-access`	Delete a skill.
`system:dacx-system.admin.view.skills:invoke-access`	Visibility of the Skills area from the system-level administrator console.

Related pages

- **Inbound Routing Strategies /Automatic Call Distributor**
- **Queue Management**
- **Routing in a Voice Campaign**
- **Types of Routing in Voice Campaign**

4.1.1.2. Preferred Agent / Sticky Agent Routing

Overview

Preferred Agent Routing, also known as Sticky Agent, is a functionality that aims to connect an inbound caller to the agent they last spoke with or an agent who is specifically assigned to them. This feature is designed to improve customer satisfaction and first-call resolution by providing service continuity.

How It Works

When a call is received, the system checks for a previously connected or specifically assigned agent for that customer's number and routes the call to them if they are available.

Configuration Steps

- **Feature Enablement:** This functionality is configured with the help of the Professional Services Team.

Best Suited For & Key Considerations

- **Relationship-Driven Interactions:** Highly effective for account management, VIP client handling, or complex, ongoing support cases where continuity is more important than immediate connection speed.
- **Managing Wait Times:** Because calls are targeted to a single individual, callers may experience longer hold times if their preferred agent is busy. To maintain a good customer experience, it is essential to configure an overflow rule (e.g., "If the preferred agent is busy for 2 minutes, route to the next available agent").
- **Agent Availability:** The success of this routing relies on the assigned agent being logged in. Contact centers must have fallback strategies in place for when a preferred agent is absent or on leave.
- **Recognized Caller IDs:** This routing depends on matching the incoming phone number with the CRM or database record. If a client calls from a new or unregistered number, the system will treat it as a new interaction.

- **Workload Monitoring:** Supervisors should actively monitor queue performance, as assigning specific customers to specific agents can sometimes lead to uneven call distribution across the floor.
- **Complex Support Tickets:** Routing a customer back to the same agent who is already familiar with their ongoing issue.

Benefits

- **Elevated Customer Satisfaction:** Creates a more personalized experience by connecting customers with an agent who already understands their history.
- **Improved First-Call Resolution:** Increases the likelihood of resolving issues on the first contact, as the agent is already familiar with the case.
- **Enhanced Efficiency:** Reduces the time customers spend repeating information.

Limitations

The system typically identifies the caller based on their registered phone number. If a customer calls from a new or unregistered number, the system will not recognize the pairing and will route the call as a new inquiry.

4.1.1.3. LRU (Least Recently Used) Routing

4.1.1.4. Ring to All / Parallel Ringing

4.1.1.5. Round Robin Routing

4.1.2. Queue Management

4.1.3. Blacklisting

4.2. In-Queue Call Treatment

4.2.1. Call Queuing / Queue Management

4.2.2. Estimated Wait Time (EWT) & Queue Position Announcement

4.2.3. VQ Pass (Virtual Queuing)

4.2.4. Voice Mail (Licensed Feature)

5. Outbound Voice Capabilities

5.1. Outbound Voice Introduction

Overview

Outbound voice is a capability that allows your contact center to initiate calls to customers rather than waiting for them to reach out. Instead of a customer dialing in, your system – or your agent – places the call outward to a phone number.

This is commonly used for:

- **Sales and lead follow-ups** – reaching out to prospects or leads from a CRM list
- **Appointment reminders** – automated calls to remind customers of upcoming bookings
- **Payment and collection calls** – proactively notifying customers about dues or overdue accounts
- **Customer verification** – calling back to confirm identity or complete a transaction
- **Surveys and feedback** – post-interaction calls to collect customer experience data
- **Alerts and notifications** – time-sensitive updates like delivery status or service disruptions

Outbound Call Types & Initiation

Outbound calls can be initiated in several ways in Exotel Enterprise Contact Center Solution:

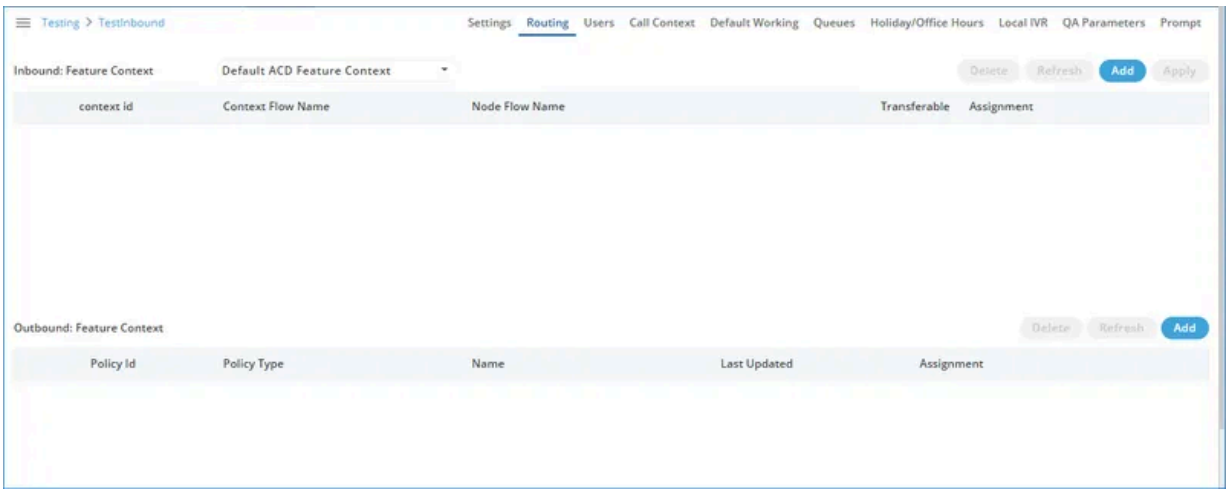
- **Auto Dial**: Automated predictive or progressive dialing as part of an outbound campaign where the agent receives a live call.
- **Manual Dial**: An agent manually enters and dials a customer's number from the user interface.
- **Preview Dial**: Customer details are displayed to the agent before the system dials, allowing the agent to accept or reject the dial attempt.
- **Callback Dial**: The agent receives a call for a previously scheduled callback.
- **Click-to-Dial**: A number is dialed directly by clicking it from a CRM web page or customer information field.

Outbound Dialing Algorithms

The system uses specific algorithms to determine how and when to dial depending on the business use case. Detailed explanation of outbound dialing algorithms are provided in the **Dialing Modes** section.

Routing in a Voice Campaign (from Administrator interface)

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



Routing for Outbound

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

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

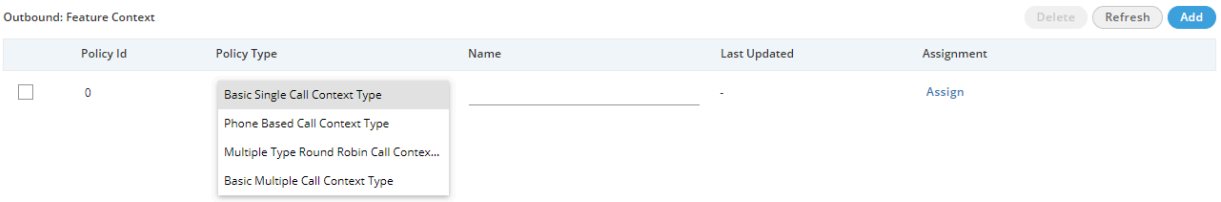


Figure: Adding an Outbound Routing Policy

3. **Select any of the following Policy Types:**

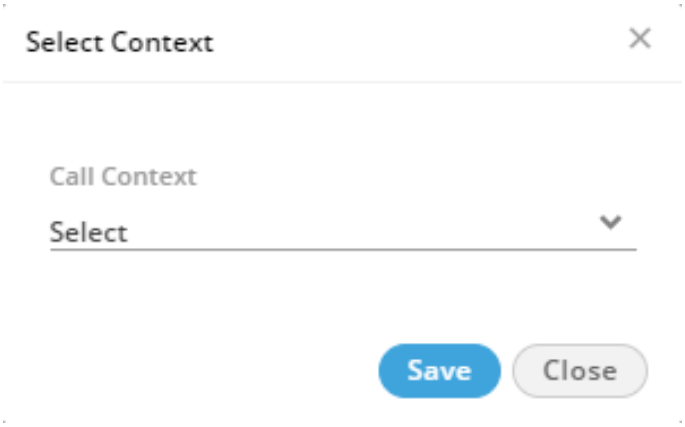
- **Basic Single Call Context Type:** It is the policy type in which outbound calls will be dialed out from the single call context.
- **Phone Based Call Context Type:** It is the policy type in which administrator can define the pattern on basis of which numbers will be dialed out from multiple call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

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

> The Outbound Routing with manual names will not work.

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

Single Call Context Type" on the page.



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

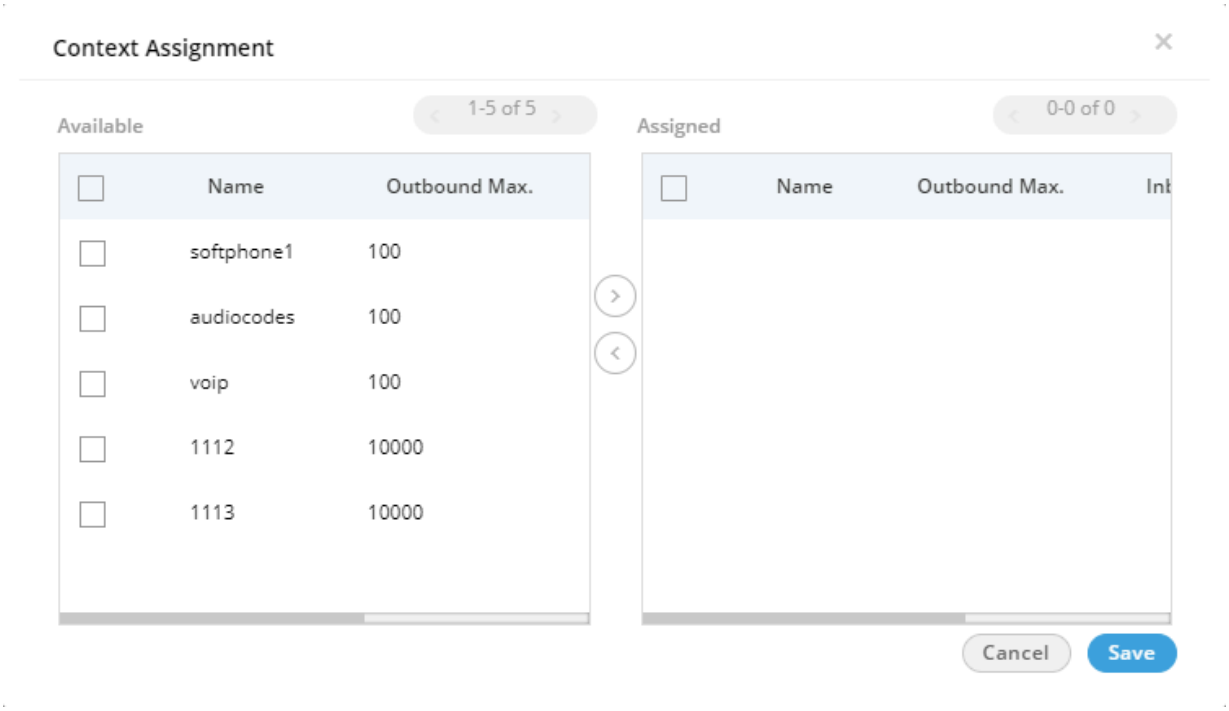


Figure: Select Call Contexts for Multiple Type Policy

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

1. Select the call contexts in "Available" section
2. Click (›) icon to proceed to assign the selected call contexts

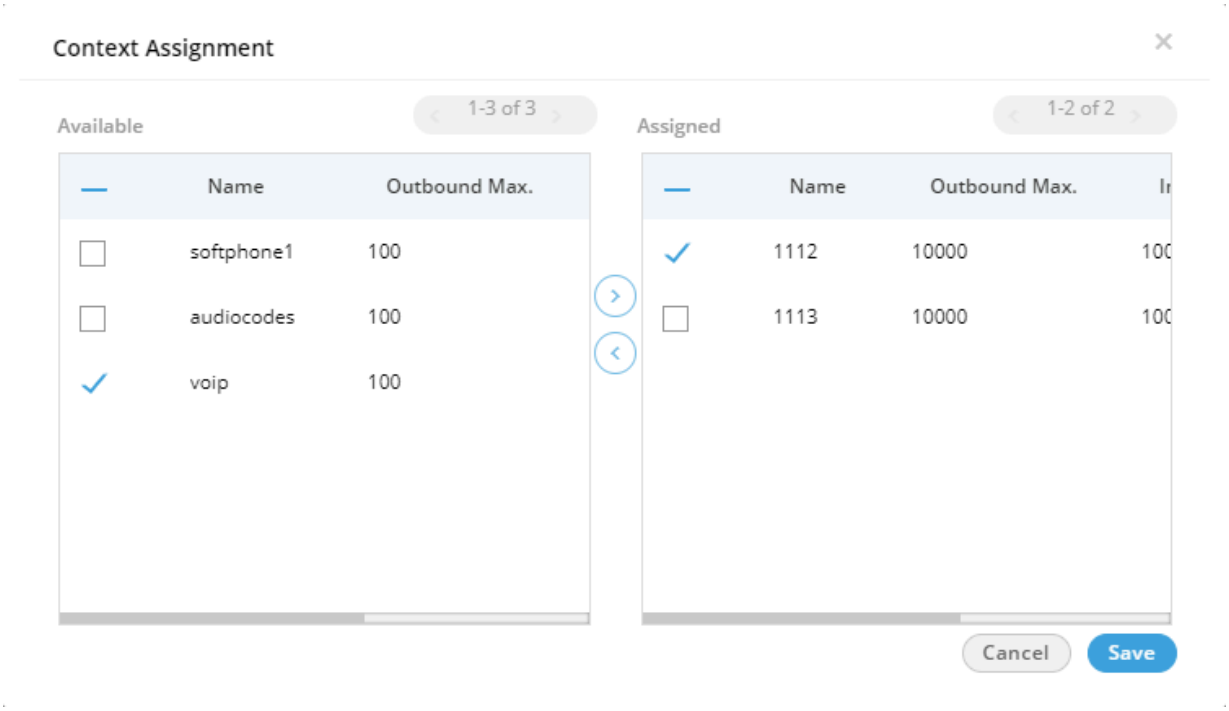


Figure: Assign or Unassign Call Contexts

3. Click "Save" to assign the call contexts to this campaign.
   Rather, you can click "Cancel" to not assign the Call Contexts.

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

5. Click "Save" to proceed to add the selected context to the routing policy.
6. Click "Apply" to create the Routing Plan for Outbound.

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

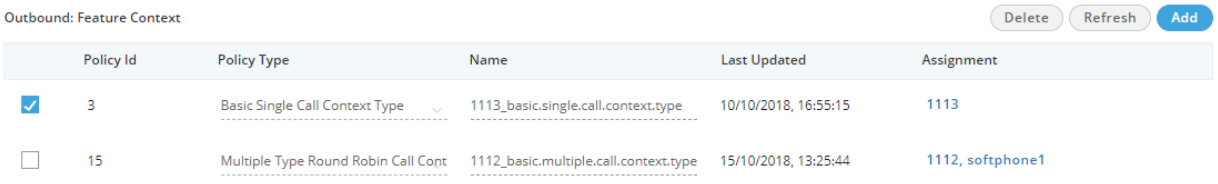


Figure: Added Outbound Routing Policies

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

Delete Routing Policy

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

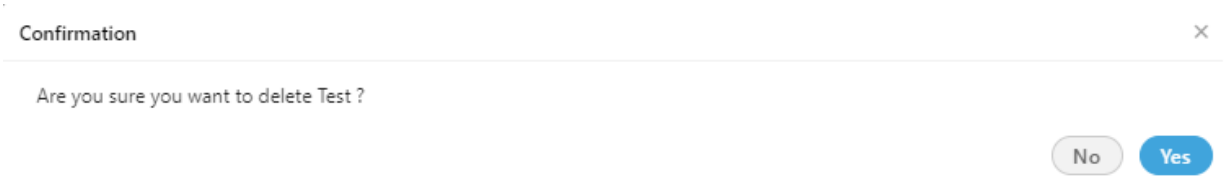


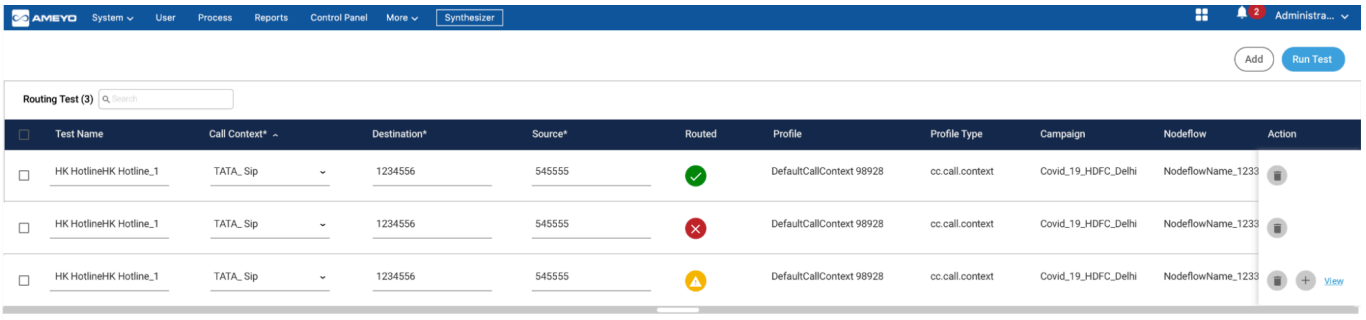
Figure: Delete Routing Policies

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

Saving Routing Test Result

When an administrator creates a routing test case, they may want to check that test case frequently so that any issues in the routing can be figured out easily. Allowing the administrator to save these test results saves an enormous amount of time for them.

On the Routing Test screen, the administrator can save the test cases. The saved test cases are listed on the same screen.



1. Administrator can also perform the following actions
2. Delete a test case or select multiple test cases and delete them

3. Search for a test case
4. Select the test case(s) they want to run
5. Edit a test case.

5.2. Dialing Modes

5.2.1. Dialing Modes and Settings - Introduction

Overview

Ameyo Outbound Management offers a suite of distinct dialing algorithms designed to optimize agent productivity and campaign efficiency. These modes allow businesses to balance the trade-off between high call volumes and customer context.

By selecting the appropriate dialing mode, operations can automate the dialing process, minimize agent idle time, and ensure that customers are contacted based on specific business logic, past history, or agent skill sets.

Supported Dialing Modes

The system currently supports five primary dialing algorithms. Below is a brief summary of each mode.

1. **Preview Dialing** Allows agents to review the customer profile and lead details *before* the call is placed.

- **Best for:** Complex sales, high-value leads, and scenarios requiring pre-call research.
    - [Detailed **Preview Dialing** Documentation]

2. **Predictive Dialing** An efficiency-driven mode that automates dialing to filter out busy signals and voicemails. It uses statistical algorithms to blast calls and connect only live humans to available agents, maximizing productivity.

- **Best for:** High-volume campaigns and maximizing agent talk time.
    - [Detailed **Predictive Dialing** Documentation]

3. **Progressive Dialing** A 1:1 automated dialing mode where the system dials one number per available agent. It is best suited for small lead lists or scenarios where call abandonment must be strictly avoided.

- **Best for:** Small businesses, small lead lists, or high-touch campaigns requiring a 1:1 ratio.
    - [Detailed **Progressive Dialing** Documentation]

4. **Parallel Predictive Dialing (PPD)** An advanced predictive mode that incorporates **target-based** and **skill-based** routing. PPD ensures that calls are not just connected, but connected to the *right* agent based on campaign granularities.

- **Best for:** Targeted outbound campaigns and skill-based routing.
    - [Detailed **PPD** Documentation]

5. **PACE (Pro Active Connect Enhancer)** A strategic module that uses historical data and customer profiles to determine the optimal time to call. PACE focuses on increasing positive connect rates and reducing the nuisance of unanswered calls.

- **Best for:** Increasing connect rates and defining intelligent contact strategies.
    - [Detailed **PACE (Pro Active Connect Enhancer)** Documentation]

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.

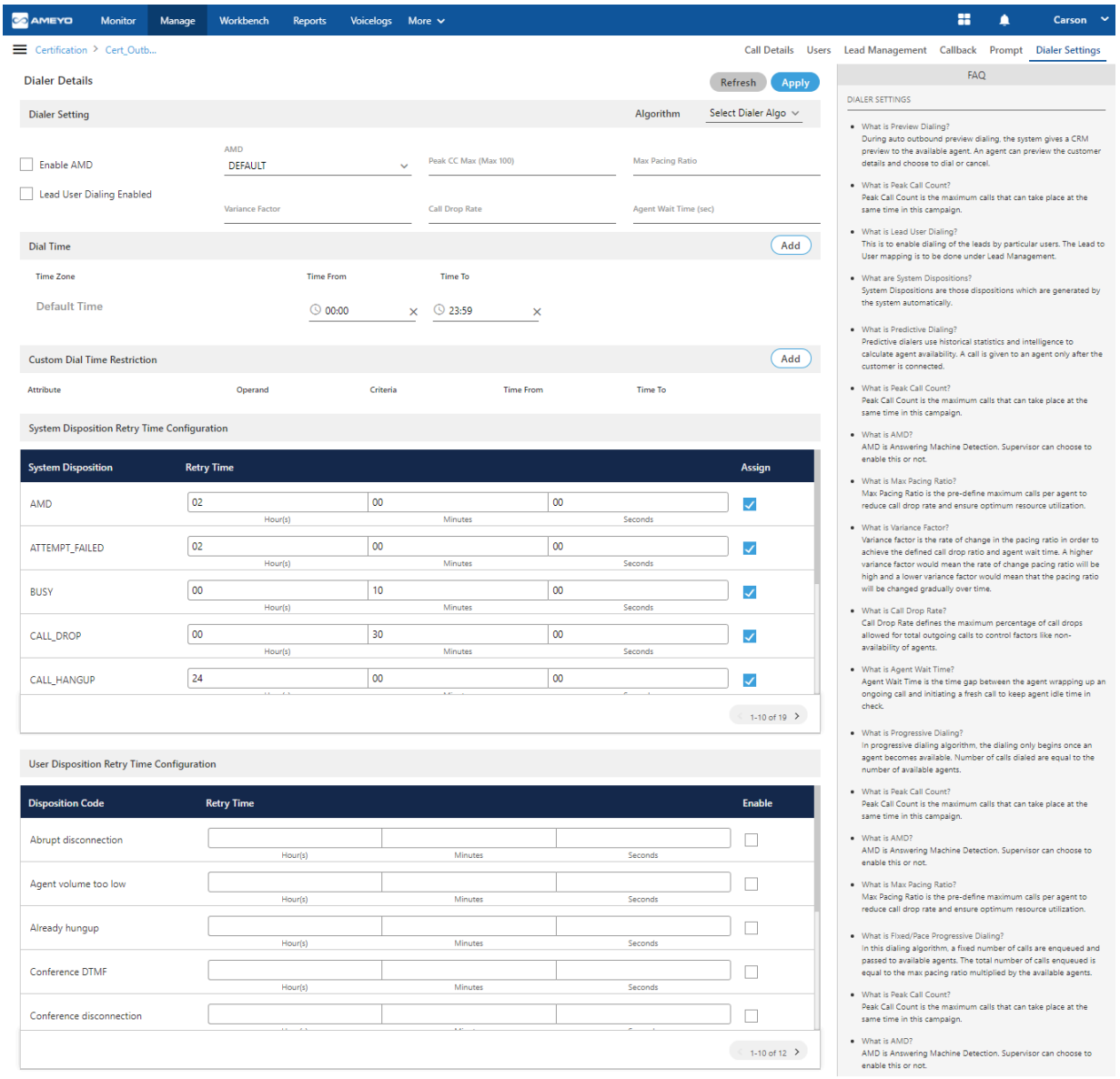


Figure: Dialer Settings

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

Selecting the Right Mode

For a technical breakdown of configuration parameters and algorithm logic for each of the dialer alogorithm, please refer to the specific documentation links given above.

Other dialing functions

- **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.

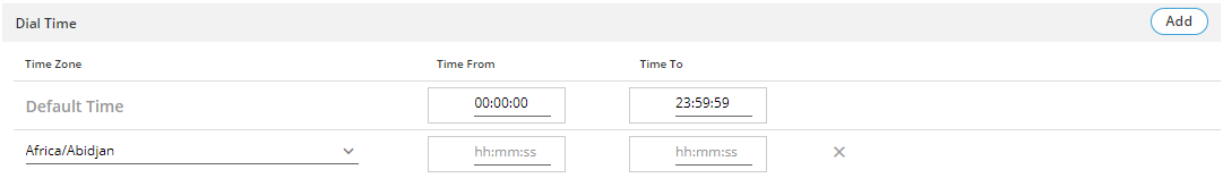


Figure: Time Zone Settings

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

- 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 the "X" icon.

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 the "Add" button.

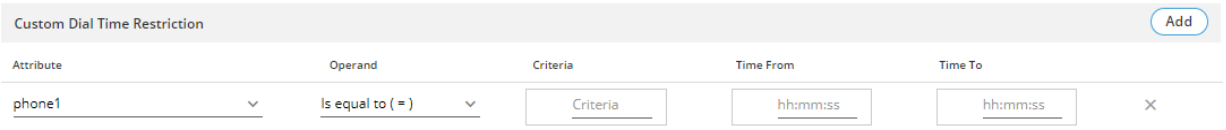


Figure: Customer Dial Time Restriction

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

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.

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.

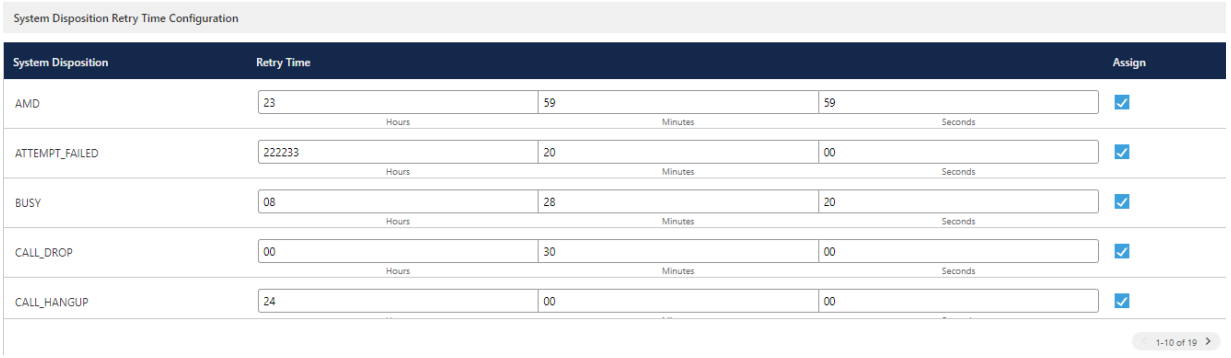


Figure: System Disposition Retry Time Settings

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

- ## (Licensable) 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

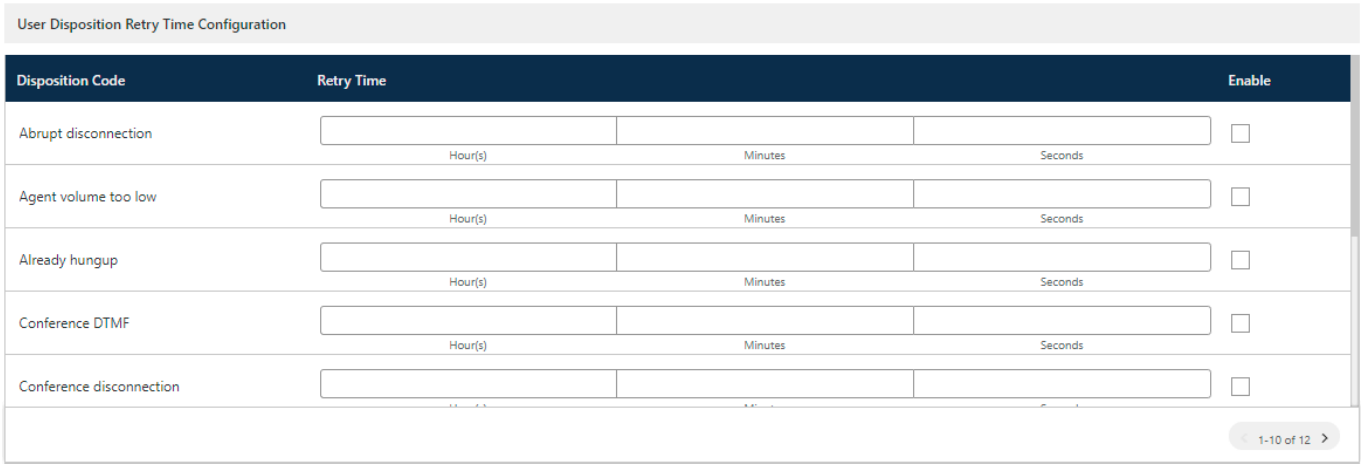


Figure: User Disposition Retry Time Settings

5.2.2. Preview Dialing

Overview

Preview Dialing is an outbound dialing mode where the system presents an agent with customer information before the call is placed. This allows the agent to "preview" the case and prepare for the conversation before the call is initiated (automatically by the dialer, or manully by the agent).

How It Works

The dialer pushes a customer record to an available agent's screen. The agent reviews the information for a configurable period (the preview timeout). After reviewing, the agent can either manually clicks on a button to dial the number or wait for the timer to complete and autodialer to initiate the call. **Preview dialing factors include:**

- **Lead User Enabled:** If Supervisor wants to enable the dialing using the uploaded lead then enable the "Lead User Enabled" Checkbox.
- **Peak Call Count:** Supervisor can specify the maximum number of simultaneous calls which should be dialed by the dialer for a particular campaign. The maximum number of peak call count which can be defined by supervisor depends upon the number of the peak call count defined at the campaign level by administrator. The supervisor can not define this count greater than the defined number by administrator.

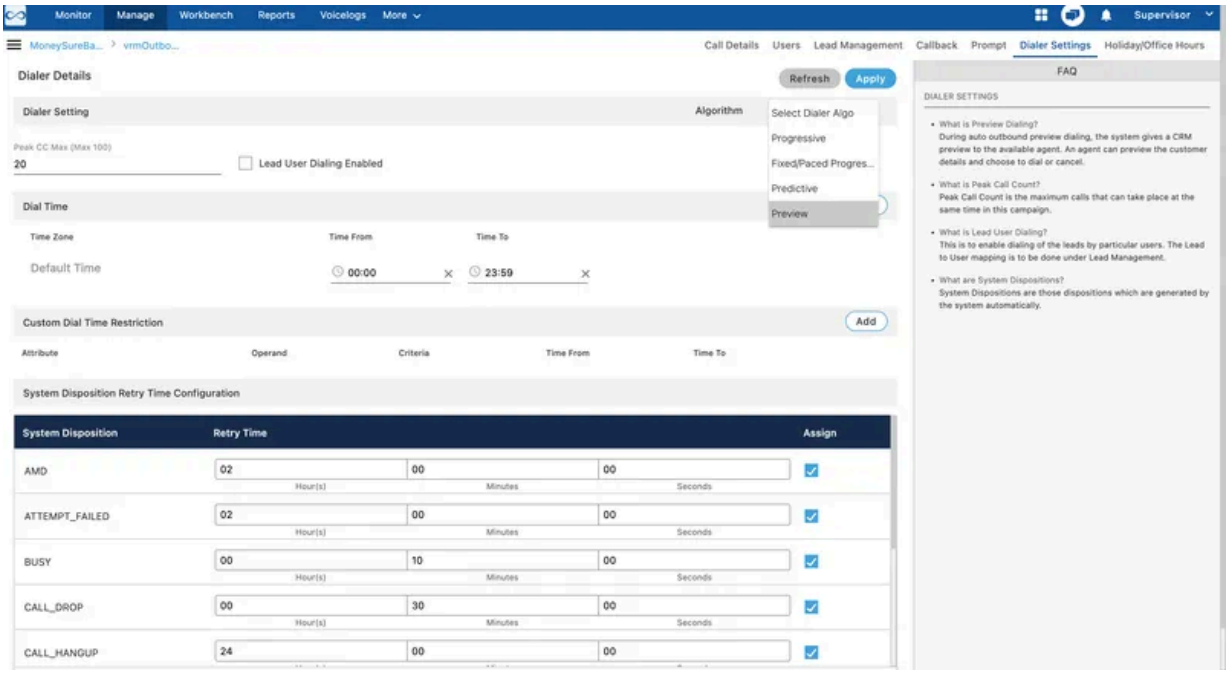
Prerequisites

- An Outbound Voice Campaign must be created.
- A lead list must be uploaded to the campaign.

Configuration Steps

- **Set Dialing Mode:**
  - **Location:** Supervisor > [Outbound Campaign Name] > Manage Tab > Dialer Settings > General Configuration
  - **Action:**

1. Select Preview from the **Dialing Mode** dropdown menu.



2. Configure the associated parameters such as Lead User Dialing Enabled and Peak CC.
3. Configure other dialing detail such as Time Zone configuration, Retry time settings etc. Know **more**

Use Cases

- **Complex Sales (B2B):** Sales agents review a prospect's company details and previous interactions before making a consultative call.
- **Debt Collection:** A collections agent reviews a debtor's payment history and notes before initiating a call.

Benefits

- **Improved Agent Preparation:** Agents are better prepared for each call, leading to more meaningful and successful conversations.
- **Increased Conversion Rates:** A well-prepared agent can better address customer needs and handle objections.
- **Enhanced Customer Experience:** The agent's familiarity with the customer's context leads to a more personalized and professional interaction.

Limitations

- This mode offers lower agent productivity in terms of call volume compared to other automated dialing modes.

5.2.3. Progressive Dialing

Overview

Progressive Dialing, also known as Power Dialing, is an automated outbound dialing mode where the system automatically places the next call as soon as an agent becomes available. It eliminates the manual dialing step, increasing agent efficiency.

How It Works

When an agent finishes a call and is free, the dialer immediately places a call to the next contact in the lead list. The agent hears the ringtone along with the customer. The customer's information is displayed on the agent's screen the moment the call is initiated.

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:

- **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 maximum number of peak call count which can be defined by supervisor depends upon the number of the peak call count defined at the campaign level by administrator. The supervisor can not define this count greater than the defined number by administrator.The maximum number (here 100) shows here in braces is depends upon the number of the peak call count defined by the administrator at campaign level and hence is customized.

Prerequisites

- An Outbound Voice Campaign must be created.
- A lead list must be uploaded to the campaign.

Configuration Steps

- **Set Dialing Mode:**

- **Location:** Supervisor >[Outbound Campaign Name]> Manage Tab> Dialer Settings > General Configuration
- **Action:**

1. Select Progressive from the **Dialing Mode** dropdown menu.

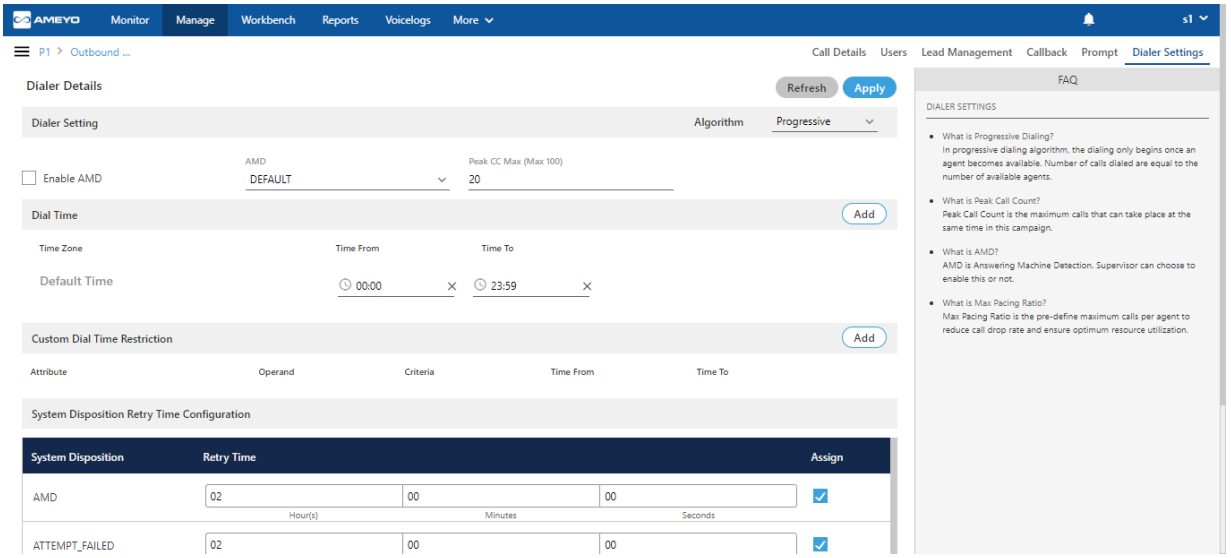


Figure: Progressive Dialer Settings

2. Optionally, set the **Pacing Ratio**. A value of 1 (default) dials one call per available agent. A higher value will dial more calls simultaneously per agent.
3. Configure other dialing detail such as Time Zone configuration, Retry time settings etc. Know **more**

Use Cases

- **Lead Qualification:** A team works through a large list of warm leads where extensive pre-call research is not required.
- **Appointment Setting:** Efficiently calling a list of prospects to schedule appointments or demonstrations.

Benefits

- **Increased Agent Productivity:** Automates the dialing process, significantly increasing the number of calls an agent can make per hour.
- **Reduced Agent Idle Time:** Minimizes the time agents spend waiting between calls, keeping them engaged and productive.

- **Simple to Configure:** Offers a balance between automation and control without the complexities of a predictive dialer.

Limitations

- Agents have no time to preview customer details before the call is placed, which may not be suitable for interactions requiring significant context.

5.2.4. Fixed Pacing Dialing

Overview

Fixed Pacing Dialing is an automated outbound dialing mode where the system dials calls at a constant, predefined rate, irrespective of agent availability. This mode is used in specific scenarios, such as Voice Blast campaigns, where the primary goal is to deliver a message to a large audience without requiring agent interaction.

How It Works

In fixed-pacing dialing, the administrator sets a constant, unchanging dialing rate that the system maintains throughout the campaign. Once a live connection is made, the call is typically routed to an IVR, a pre-recorded message, or passed to an available agent.

The system algorithmically determines the exact number of calls to enqueue based on two deciding factors: the **Max Pacing Ratio** and the **Peak CC** (Concurrent Calls). To calculate the dialing volume, the system multiplies the Max Pacing Ratio by the number of available agents. For example, if the ratio is 2.5 and there are 2 available agents, the dialer will initiate 5 calls. However, this total is always bounded by the Peak CC; if the calculated number of calls exceeds the Peak CC, the dialer will only initiate calls up to the Peak CC limit. **Fixed Pacing Dialer factors include:**

- **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. The maximum number of peak call count which can be defined by supervisor depends upon the number of the peak call count defined at the campaign level by administrator. The supervisor can not define this count greater than the defined number by administrator.
- **Max Pacing Ratio:** This parameter controls the ratio of dialing calls to free agents. A higher value implies an increase in the number of dialing calls.

Prerequisites

- An Outbound Campaign, often a Voice Blast Campaign, must be created.

- A lead list must be uploaded to the campaign.

Configuration Steps

- **Set Dialing Mode:**
  - **Location:** Administrator > Manage > [Campaign Name] > General Configuration
  - **Action:**
    1. Select Fixed Pacing from the **Dialing Mode** dropdown menu.

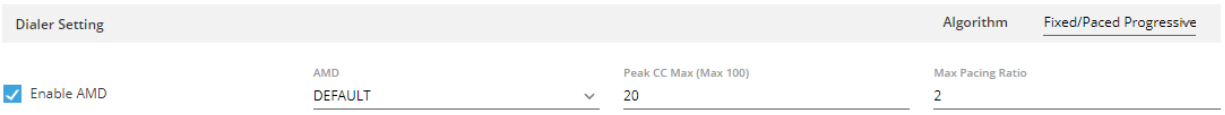


Figure: Fixed Pacing Dialer Settings

    2. Configure the associated pacing parameters, such as AMD, Peack Call Count, and Max pacing ratio.
    3. Configure other dialing detail such as Time Zone configuration, Retry time settings etc. Know **Dialing Modes and Settings - Introduction**

Use Cases

- **Voice Broadcasting:** A company sends a pre-recorded promotional message or a public service announcement to thousands of customers.
- **Automated Surveys:** A research firm initiates outbound calls that, upon connection, route the customer to an IVR-based survey.

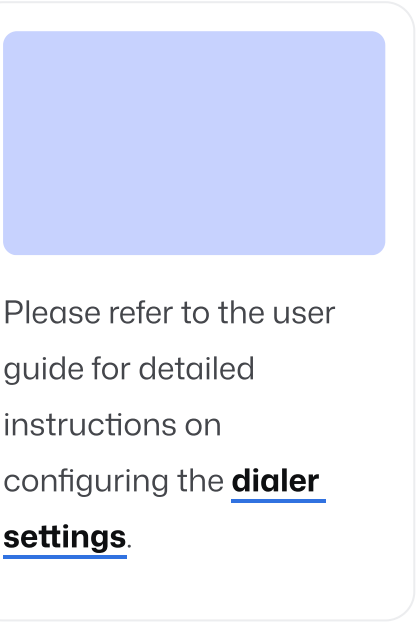
Benefits

- **Massive Outreach:** Enables the delivery of a voice message to a very large audience in a short and predictable amount of time.
- **Agentless Operation:** Can be run without requiring any live agents, making it a highly cost-effective solution for one-way communication.
- **Consistent Pace:** The fixed dialing rate ensures a steady, predictable load on the telephony system.

Limitations

- This mode is not suitable for two-way conversations, as it is not designed to connect live callers to available agents.
- If not used carefully, it can be perceived as robocalling and may be subject to strict telemarketing regulations.

Further Reads:



Please refer to the user guide for detailed instructions on configuring the **dialer settings**.

5.2.5. Predictive Dialing

Overview

Predictive Dialing is an aggressive outbound dialing mode that uses an algorithm to dial multiple numbers per agent. It aims to maximize agent productivity by predicting when an agent will become available and having a live call ready to connect, minimizing idle time.

How It Works

The predictive dialer is our most productive dialing algorithm, designed to maximize agent efficiency. It begins by initiating a large volume of calls simultaneously, algorithmically screening out busy signals, no-answers, and voicemails.

Behind the scenes, the system uses historical statistics and intelligent forecasting to **predict agent availability**. It knows exactly how many dials it takes—and how much time is required—to reach a live contact. The system continuously adjusts its **calling rate** based on a variety of real-time factors, including peak concurrent calls (CC), maximum pacing ratio, variance factor, agent wait time, and the campaign's target call drop ratio.

Ultimately, the dialer ensures that a call is instantly transferred to an agent **only when a live prospect answers**, effectively eliminating agent idle time and preventing unnecessary dropped calls. **Predictive dialing factors include:**

- **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. The maximum number of peak call count which can be defined by supervisor depends upon the number of the peak call count defined at the campaign level by administrator. The supervisor can not define this count greater than the defined number by administrator.
- **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 Rate:** The call drop ratio is a metric that indicates the allowable rate at which customer calls can be dropped within a particular campaign.**Example:** if you configure the call drop ratio to 10%, it means that up to 10% of your connected calls are permitted to be dropped. Based on this ratio, the dialer will automatically increase or decrease the number of calls being placed to maintain the desired performance level.
- **Agent Wait Time (sec):** Agent wait time is the allowable average time an agent waits for the next call in a specific campaign managed by a dialer.**Example:** if you configure the agent wait time to 5 seconds, it means that the dialer is set to ensure that an agent waits no more than 5 seconds for the next call. If the actual wait time exceeds the configured value, the dialer will increase the number of calls being placed to reduce the wait time.

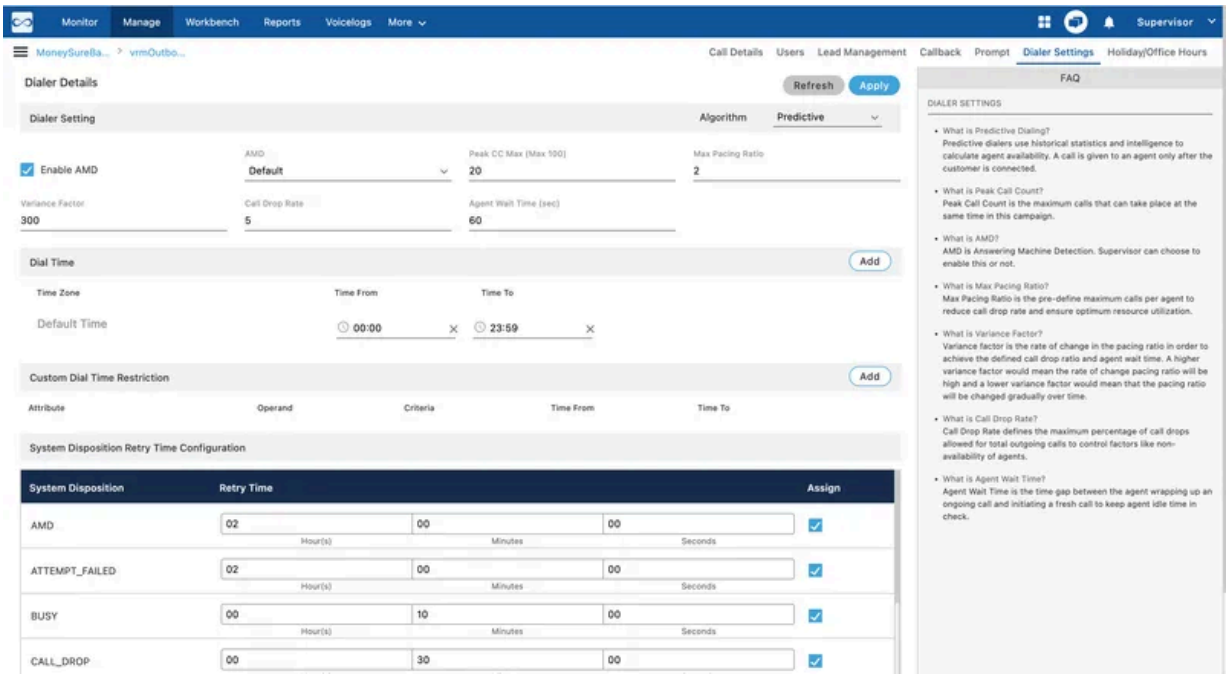
The dialer first aims to meet the configured call drop rate before attempting to achieve the target agent wait time.

Prerequisites

- An Outbound Voice Campaign must be created.
- A lead list must be uploaded to the campaign.

Configuration Steps

- **Set Dialing Mode and Parameters:**
  - **Location:** Administrator > [Outbound Campaign Name] > Manage tab > Dialer Settings > General Configuration
  - **Action:**
    1. Select Predictive from the **Dialing Mode** dropdown menu.



2. Configure the associated parameters such as AMD, Peak CC, Max pacing Ratio,Variance factor, Call drop rate, and Agent wait time (in seconds).
3. Configure other dialing detail such as Time Zone configuration, Retry time settings etc. Know **more**

Use Cases

- **Telemarketing:** High-volume campaigns selling a product or service to a large list of prospects.
- **Payment Reminders:** Automatically dialing a large list of customers to remind them of upcoming payment due dates.

Benefits

- **Maximum Agent Productivity:** Drastically reduces agent idle time by ensuring a near-continuous flow of live conversations.
- **Increased Efficiency:** Automates the entire dialing and call-screening process, allowing agents to focus exclusively on speaking with live customers.
- **Scalable Outreach:** Enables contact centers to reach a very large number of customers in a short amount of time.

Limitations

- There is a risk of "dropped calls" if a customer answers and no agent is free. This is often subject to strict regulatory compliance.
- The immediate connection is not suitable for complex interactions that require agent preparation.

5.2.6. Parallel Predictive Dialing

Overview

Parallel Predictive Dialing is a specialized and highly advanced dialing mode designed for campaigns that manage multiple skills or processes simultaneously. It allows the system to dial predictively for a primary skill while also handling leads from a secondary skill.

How It Works

This mode is exclusive to the "Parallel Predictive Voice Campaign" type. The system uses a predictive algorithm to dial leads from a primary skill list. Concurrently, it can manage and fetch leads from a separate, secondary skill list, blending different outbound activities for the same group of agents within a single campaign structure.

Prerequisites

- Requires the creation of a specific "Parallel Predictive Voice Campaign". (Licensable)

Configuration Steps

1. Campaign Selection	Select the Parallel Predictive Voice Campaign to configure.	This is the specific campaign type that utilizes predictive dialing logic.
2. Select Dialing Algorithm	Define the Customer Provider Type in the Advanced Settings.	This selects the algorithm that governs how numbers are fetched and prioritized for dialing. The PACE Based Customer Provider is the recommended advanced predictive solution.
3. Set Cache Parameters	Configure Minimum Cache Size and Fetch Size.	These settings determine the number of customer records the dialer holds in reserve (Cache Size) and the amount it fetches from the database at one time (Fetch Size).
4. Define Dial Profile	Configure Dial Profile Settings for Auto Dial.	Set the maximum time limits for dialing attempts, including Ringing Timeout (how long a number rings before disconnecting) and Setup Timeout (time to establish a connection).
5. (Optional) AMD	Enable Answering Machine Detection (AMD).	This feature can be activated in the Campaign Settings to automatically detect and disconnect calls answered by a machine, optimizing agent time.
6. Set ACW Time	Configure After Call Work (ACW) Timeout.	Mandatory time limits (for Connected and Not Connected Calls) must be set to ensure agents finalize their disposition and are quickly returned to the available state for the predictive queue.

Use Cases

- **Blended Operations:** An agent primarily makes outbound sales calls (primary skill) but can be fed leads for a different product or service (secondary skill) to maximize cross-selling.

- **Multi-stage Campaigns:** Using the primary skill for initial contact and the secondary skill for follow-up calls, all managed within one campaign.

Benefits

- **Enhanced Campaign Flexibility:** Allows for the blending of multiple outbound objectives or skills within a single campaign.
- **Increased Dialing Efficiency:** Applies the power of predictive dialing across multiple lead lists or processes simultaneously.
- **Streamlined Management:** Consolidates related but distinct outbound activities under one campaign umbrella.

Limitations

- This is a highly complex dialing mode that requires careful planning and strict adherence to its specific setup guide.
- It can increase the cognitive load on agents who may need to switch between different scripts or contexts.

5.2.7. PACE (Pro Active Connect Enhancer)

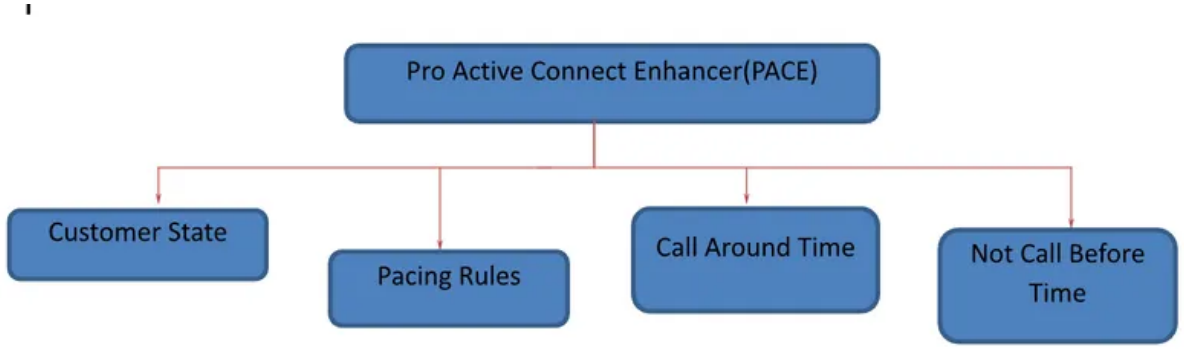
Overview

PACE (Pro Active Connect Enhancer) is a software module designed to add intelligence to the outbound dialing process. It works in conjunction with the **Predictive Dialer** to optimize lead selection and improve productivity.

Unlike standard dialing modes that may simply iterate through lists, PACE analyzes transaction history and customer profiles to define a smarter contact strategy. By categorizing customers based on past behavior and identifying the best time slots to call, PACE effectively "adds brains" to the dialing process, ensuring agents connect with the right customers at the right time.

How it Works

PACE functions by implementing an intelligent dialing strategy based on four core parameters as shown in the image below:



Prerequisites

- **Predictive Dialer:** PACE is not a standalone dialing mode; it works in conjunction with the Predictive Dialer module.
- **Package Licensing:** Features are subject to the opted package and may require add-ons or upgrades.

Use Cases

- **High-Value Lead Prioritization:** Using **Customer State**, a sales team can ensure that leads marked as "Closure" or "Interested" are dialed before "Fresh" leads, increasing conversion potential.
- **Automated Retry Management:** Using **Call Around Time (CAT)**, a campaign can automatically recycle "Busy" numbers after a set delay (e.g., 2 hours) without manual agent intervention.
- **Customer Experience Optimization:** Using **Not Call Before (NCB)**, businesses can respect customer time preferences, reducing the nuisance of calls at the "wrong time" and improving brand perception.

Usage Instructions / Configurations

At Administrator level:

Administrators can configure PACE using the following logic blocks:

> The **States** and **Rules tabs** in **Process Settings** are designed to integrate PACE (ProActive Connect Enhancer) with the contact center system. PACE acts as a customer provider, and together with Ameyo's Predictive Dialer, it forms the complete PACE Solution. PACE maintains the customer cache from which the dialer picks records for outbound calls.
>
> **PACE** is used when customer behavior patterns are known in advance. Based on this behavior analysis, specific rules can be created to optimize call strategies and improve overall productivity.

1. Customer State (Prioritization) -State Tab in Process Settings (Licensable)

This feature categorizes customers into groups (States) based on user behavior and each state can be assigned a specific dialing percentage.

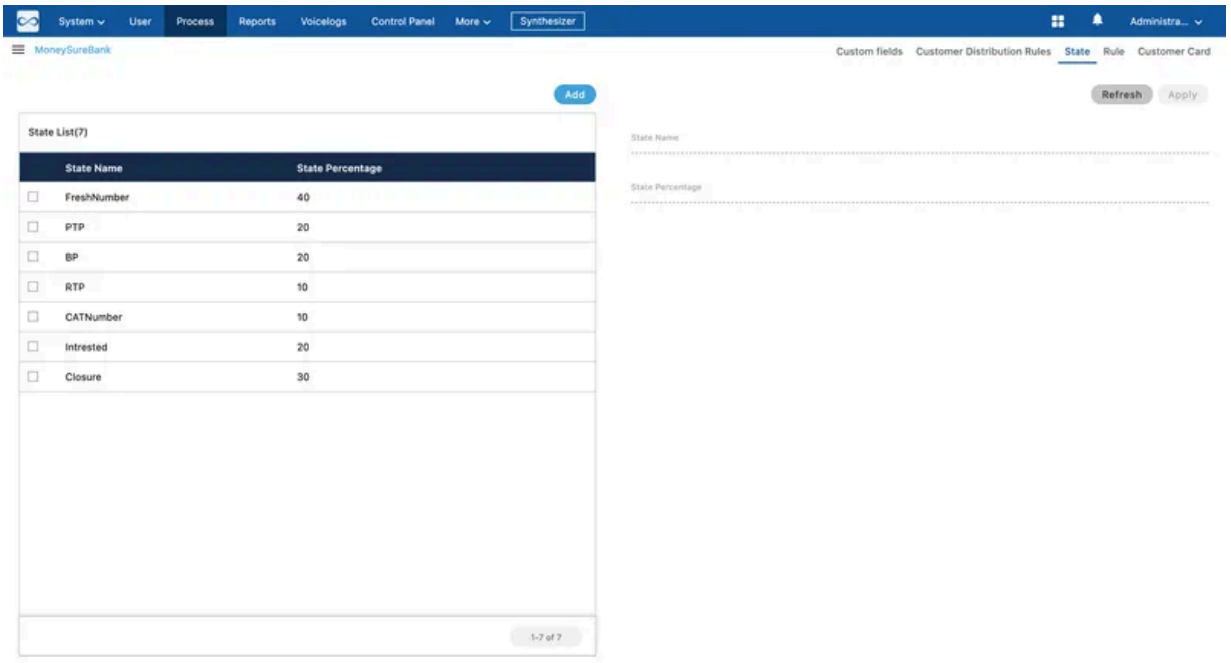
- **Logic:** A dialing priority is assigned to each state. Customers in a state with a higher assigned percentage/priority are dialed first.

- **Example Configuration:** You can define states such as "FreshNumber" (40%), "Closure" (30%), or "PTP" (Promise to Pay - 20%) to ensure high-value leads are prioritized.

> To activate PACE, ensure that “PACE Based Customer Provider” is selected in the settings of a Parallel Predictive Campaign.

Administrator Screen:

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



- ## Add a State

To create a new state:

1. Click **Add** in the State tab.

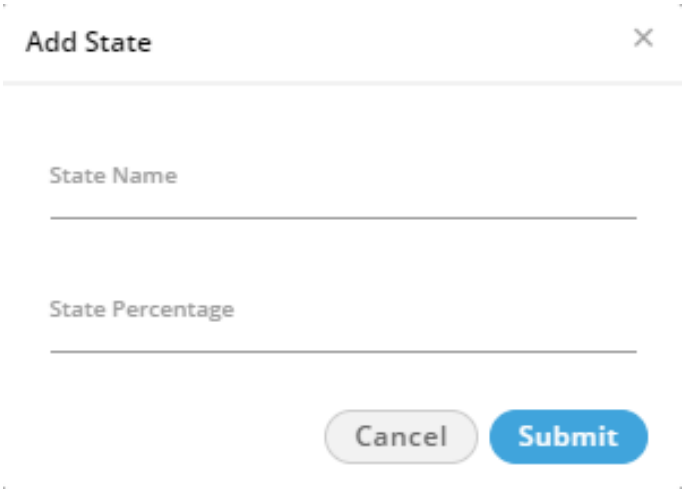


Figure: Add a State

2. In the pop-up window, enter the **State Name**.
3. Specify the **Dialing Percentage** for the state.
4. Ensure the total percentage across all states does not exceed 100.
5. Create multiple states as needed, distributing up to 100% among them.

- ## Default States

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

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

- ## Modify a State

To modify an existing state:

1. Select the state from the list to display its details in the right section.

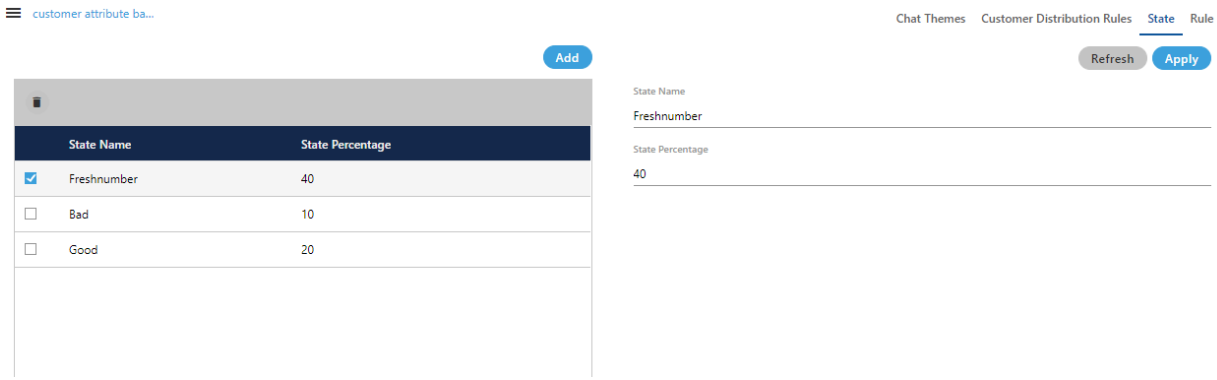


Figure: Details of a State

2. Update the **State Name** or **State Percentage** as required.

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

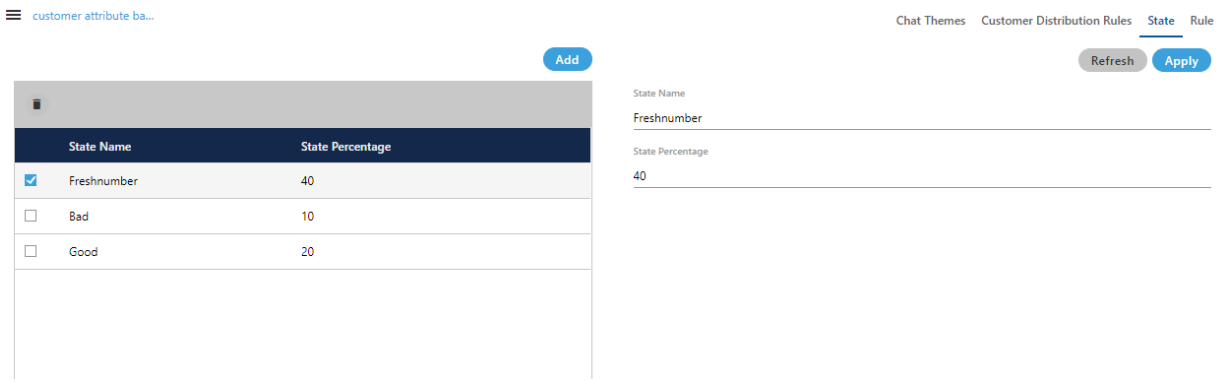
3. Click **Apply** to save the changes, or **Refresh** to discard them.

• Delete a State

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

To delete a state:

1. Select the state you wish to remove.



2. Click the **Delete** icon.

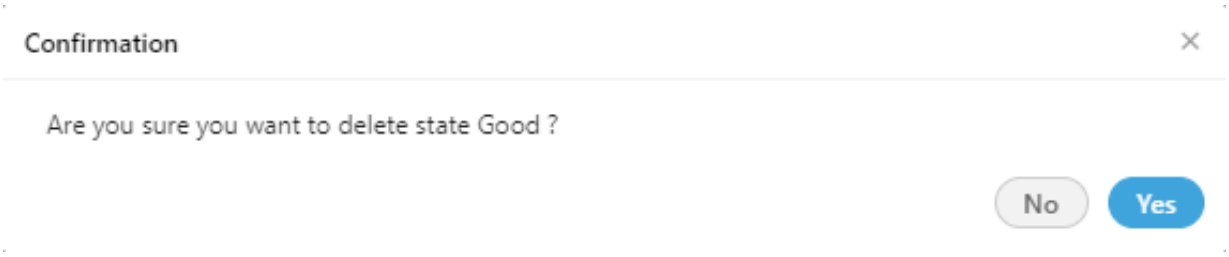


Figure: Warning before deleting a State

3. Review the warning message displayed.
4. Click **Yes** to confirm and permanently delete the state.

2. Pacing Rules -- Rule Tab for PACE in System Settings (Licensable)

Pacing rules control the order of dialing by applying custom dispositions and call parameters. **There are four types of rules available:**

- **Simple Rule:** Configures multiple attempts and retry times for specific system dispositions.
- **Timer Rule:** Analyzes call activity within a specific time window to determine patterns.
- **Upload Rule:** Assigns tags to contacts during the list upload process, allowing PACE to behave differently based on the assigned tag.
- **Complex Rule:** Allows for custom rules defined using JavaScript for specific, advanced use cases.

Rule Tab in System Settings allows the Administrator to create the rule for the PACE.

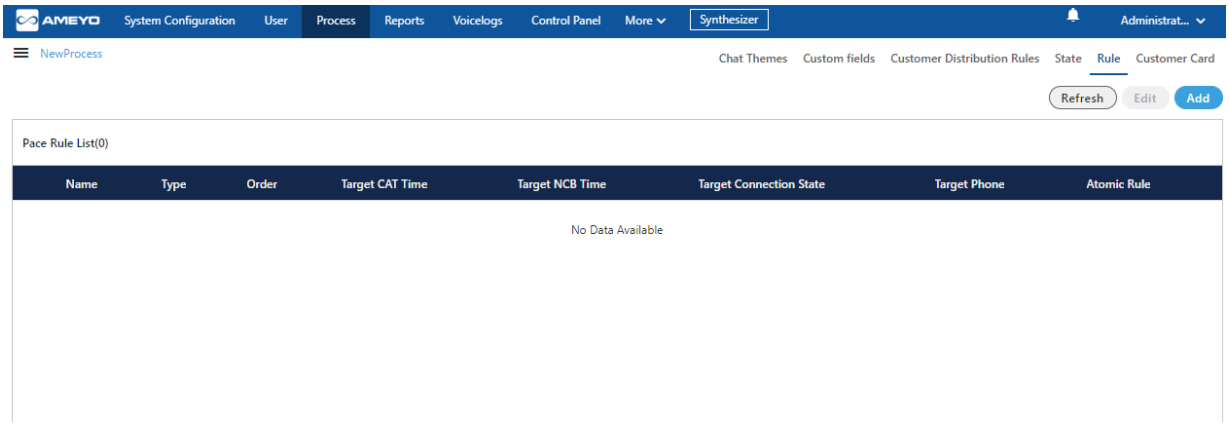


Figure: Rule Tab to Manage PACE

- **Add a PACE Rule**

Perform the following steps to add a PACE Rule.

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



Figure: Pop-up to add a Rule

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



Figure: Optional Date and Time Field

Suppose a case where three different PACE states such as "state1", "state2", and "state3" have been created. After calling, the customer (say C1) is moved to from "state1" to "state2". If the PACE rule is applied again on the same customer (C1), then the customer will move from "state2" to "state3". But, if the Administrator wants to change the state of the customer (C1) back to "state1" from "state2" or "state3", then the Administrator has to create the rule and provide "0" (zero) values in both CAT and NCB fields.

Instead of adding zero as value, these fields should remain blank to decrease the unnecessary manual inputs.

To meet this requirement, the CAT and NCB fields in the PACE rules have made optional fields instead of being mandatory. (*) symbol with these fields have also been removed.

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



Figure: Sample Details

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

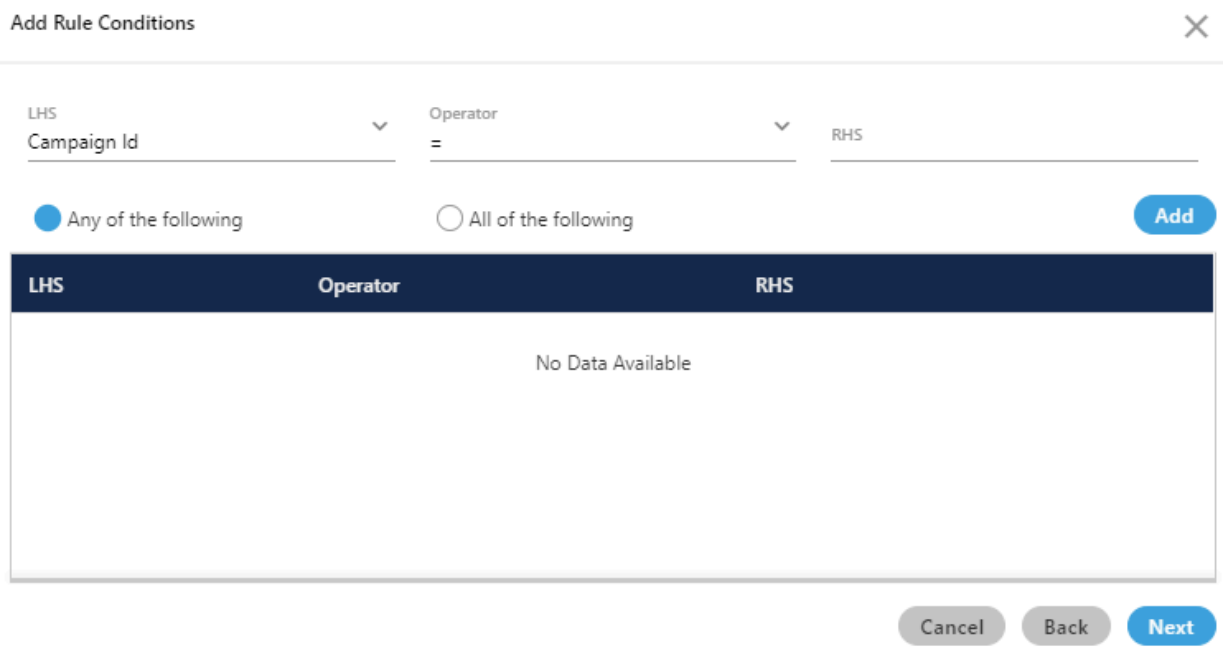


Figure: Add Condition

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

9. In "LHS" drop-down menu, select any of the following values.
    - System Disposition
    - Disposition Code
    - Disposition Class
    - Last Status
    - Last Disposition
    - Last Dialed Time
    - CAT Time
    - NCB Time
    - Connection State
    - Campaign ID
10. Select any of the following operators.
    - =
    - <>
    - <=
    - >=
11. Provide the corresponding value for any selected "LHS" condition in "RHS" text field.

12. Click "Add" to add the rule.
13. You can add multiple rules here. To manage them, you can select any of the following options.
    - **Any of the following:** Select this option to run the rule when any of the selected conditions are matched.
    - **All of the following:** Select this option to run the rule only when all of the selected conditions are matched.

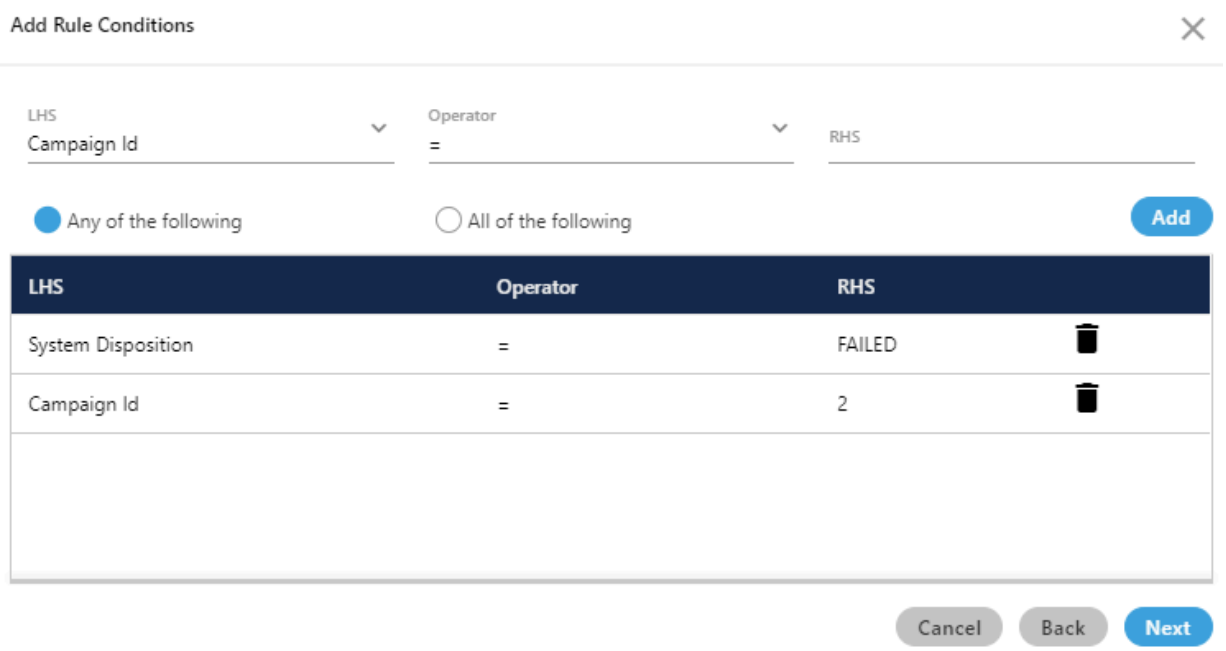


Figure: Add Conditions

You can click on delete icon to delete any rule.

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



Figure: Select an Action

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

- **None:** Select it not to perform any action on the state (group of numbers), which meets the pre-selected conditions.

- **Move to owner's lead:** Select it to move the state (group of numbers) to the owner's lead, which meets the pre-selected conditions.
- **Move to lead:** Select it to move the state (group of numbers) to the lead, which meets the pre-selected conditions. If selected, it shows a drop-down menu that lets you select the lead to which the numbers can be moved.

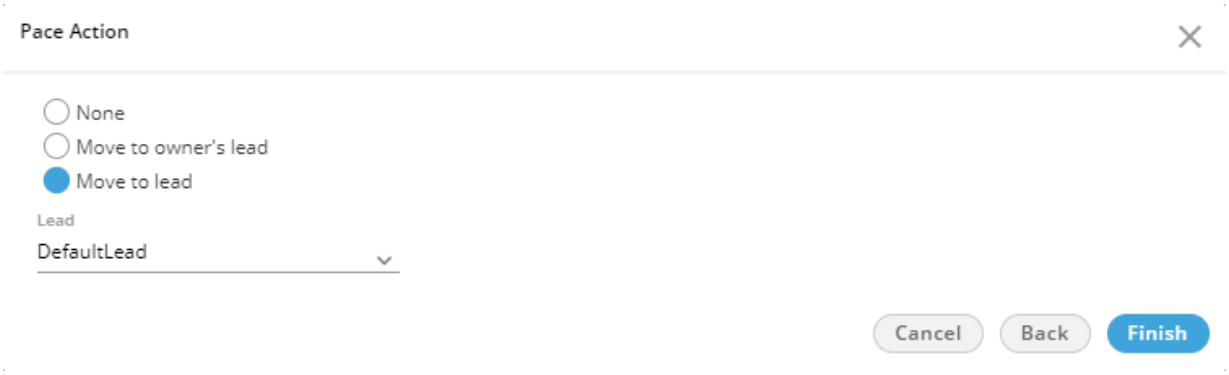


Figure: Selected to move State (Group of Numbers) to the selected lead

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

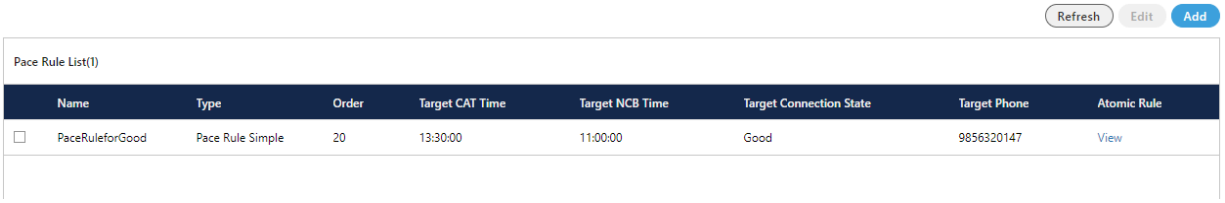


Figure: List of State Rules

- ## Modify a PACE Rule

Perform the following steps to modify a PACE Rule.

1. Select a PACE Rule which you want to modify, and click "Edit" button.
2. The information of the selected rule is visible on the same modal which was used to create the rule.
3. Here, you can change the State Name and the State Percentage as well.

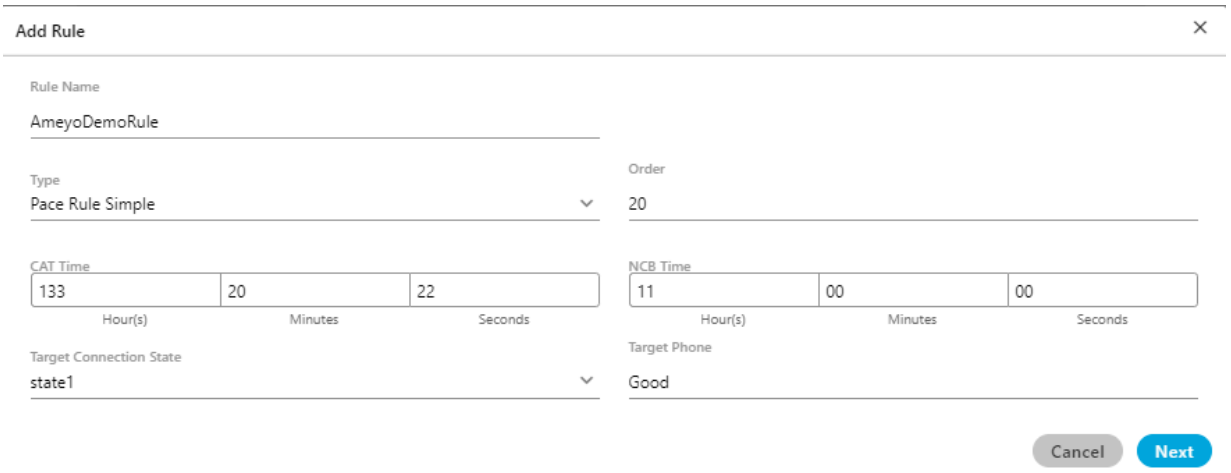


Figure: Modify PACE Rule

- **Delete a PACE Rule**

Perform the following steps to delete a PACE Rule

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

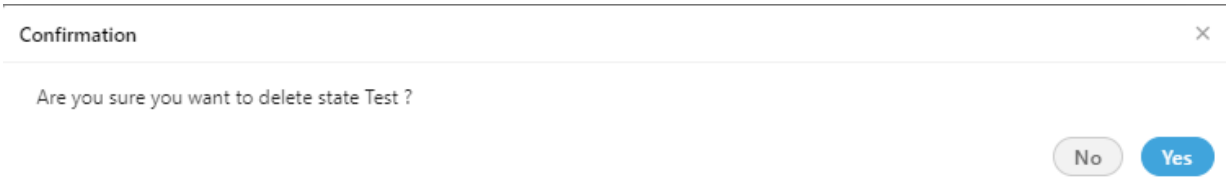


Figure:Delete PACE Rule

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

3. Call Around Time (CAT)

CAT is a re-dial strategy designed to maximize connects.

- **Logic:** It sets a specific duration after which a number should be re-dialed if the previous attempt failed (e.g., "Busy" signal).
- **Example:** If a call is "Busy" at 11:00 AM and CAT is set to 2 hours, the system will automatically re-dial that number around 1:00 PM.

4. Not Call Before (NCB) Time

NCB ensures compliance and improves customer experience by preventing calls at inappropriate times.

- **Logic:** Based on previous interaction history, the system determines specific times when a customer prefers to be called. PACE ensures the dialer does not "throw" the call to the customer until that specific time period has passed.

Benefits

- **Maximize Customer Connects:** Smarter algorithms lead to a higher number of connected calls.
- **Optimize Agent Productivity:** Ensures agents spend time talking to prospective customers rather than dialing or waiting.
- **Reduced Telecom Costs:** Proactive strategy reduces wasted dial attempts.
- **Smarter Contact Strategy:** Enables configuration based on customer segmentation and interaction history.
- **Reduced Nuisance Calls:** Prevents calling customers at inconvenient times, reducing negative feedback.

Limitations & Considerations

- **Dependency:** PACE is a software module that must be used with the Predictive Dialer; it does not function as a standalone dialing mode.
- **Licensing:** Availability of specific PACE features is subject to the commercial package and may require add-on costs.

5.3. Outbound Campaign Configuration

5.3.1. Dialer Pacing Ratio

Overview

The Dialer Pacing Ratio is a configuration setting specifically for the Progressive dialing mode. It controls the number of calls the system dials for each available agent. Adjusting this ratio allows administrators to balance call volume with agent workload.

How It Works

In Progressive mode and Predicitive mode, the system dials automatically for an agent. The Pacing Ratio acts as a multiplier. A ratio of 1 (the default) dials exactly one call for each available agent. A ratio of 2 would dial two calls for each agent, and so on. This allows for a more aggressive dialing pace than the standard one-to-one approach.

Prerequisites

- The outbound campaign's dialing mode must be set to Progressive or Predicitive.

Configuration Steps

- **Set Pacing Ratio:**
    - **Location:** Supervisor > [Campaign Name] >Manage > Dialer Settings> General Configuration

- **Action:** After selecting Progressive or Predicitve as the **Dialing Mode**, enter a numerical value in the **Pacing Ratio** field.

Use Cases

- **Standard Progressive:** A Pacing Ratio of 1 is used for a steady, one-to-one dialing experience.
- **Aggressive Progressive:** A Pacing Ratio of 1.5 or 2 might be used with a high-quality lead list where the connection rate is expected to be lower, allowing the dialer to place more calls to ensure an agent is quickly connected.

Benefits

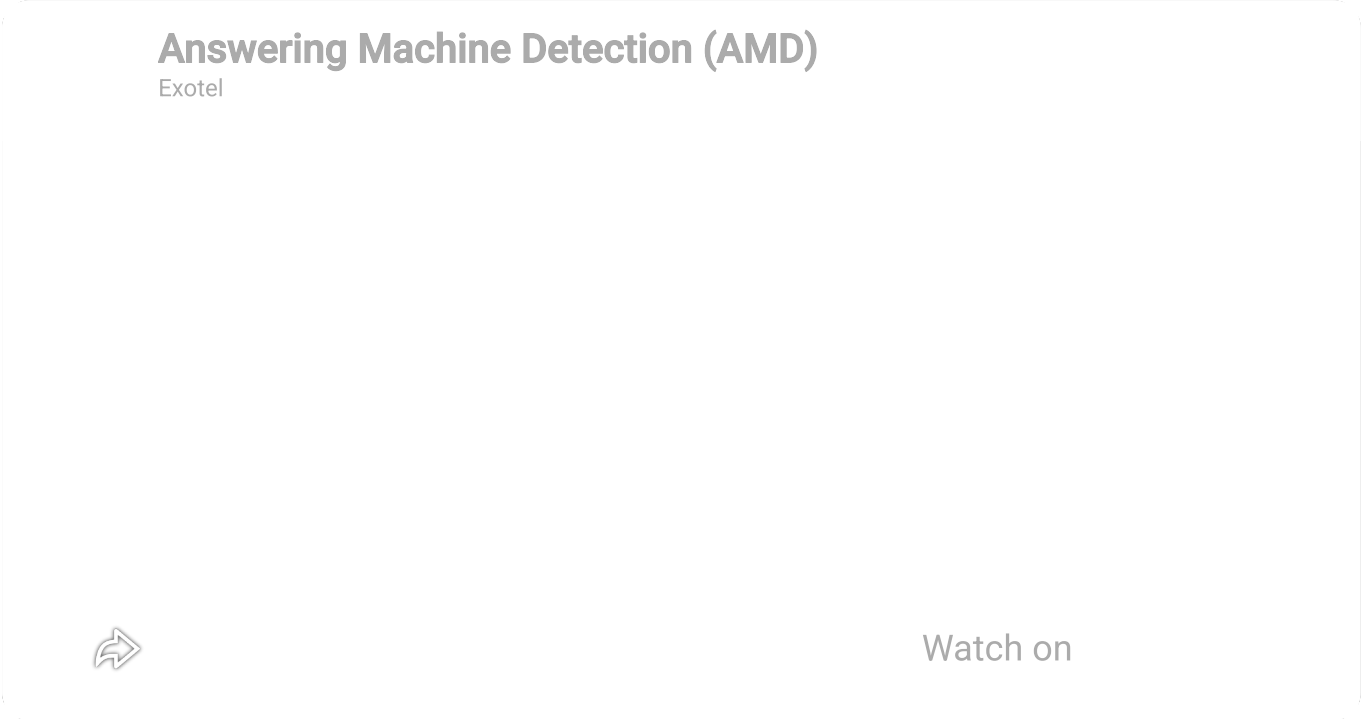
- **Flexible Dialing Speed:** Provides administrators with control over the intensity of a progressive dialing campaign.
- **Optimized Agent Occupancy:** Helps to fine-tune the call flow to better match the connection rate of a specific lead list.
- **Increased Contact Attempts:** A higher pacing ratio allows the campaign to make more call attempts in the same amount of time.

Limitations

- This setting is only applicable to the **Progressive and Predictive** dialing mode as described in the manual.
- Setting the ratio too high may lead to a situation where multiple calls connect simultaneously for one agent.

5.3.2. Answering Machine Detection (AMD)

Answering Machine Detection (AMD) is a feature used in automated outbound dialing modes to determine if a call has been answered by a live person or an answering machine. By filtering out machines, AMD ensures that agents' time is spent speaking only with live prospects.



How It Works

When a call is answered, the AMD system analyzes the initial audio. It listens for cues that distinguish a human voice from a recorded greeting. If a machine is detected, the system disconnects the call. If a live person is detected, the call is immediately connected to an available agent.

Prerequisites

- The outbound campaign must be using a supported dialing mode.
- **Action:** Check the **AMD** checkbox to enable the feature for the campaign. Starting from version 4.13.33, AMD is available across **all dialing modes**, including **Preview** and **Manual Dial** – not only automated modes like Predictive.

Use Cases

- **High-Volume Sales:** In a telemarketing campaign, AMD screens out all the voicemails, dramatically increasing the number of live conversations agents have per hour.
- **Lead Generation:** AMD is used to quickly sift through large contact lists to identify and connect with interested prospects efficiently.

Benefits

- **Massive Productivity Gains:** Agents spend significantly more time talking to potential customers and less time listening to voicemail greetings.
- **Improved Agent Morale:** Focusing on live conversations is more engaging and rewarding for agents than repeatedly encountering answering machines.
- **Increased Campaign ROI:** By maximizing the number of productive interactions, AMD helps to improve the overall return on investment.

Fundamental AMD Logic and Mechanics

This part of the article will delve into the core algorithm that powers AMD in the Asterisk communication platform. While different AMD configurations exist, the underlying algorithm remains constant across all setups.

Flow

Answering Machine Detection (AMD) is a standalone application that communicates with Asterisk, a communication platform, using a local socket. Here's how the interaction between AMD and Asterisk works:

AMD Setup and Configuration:

1. **Loading Configurable Parameters:** When AMD starts, it reads its configurable parameters from a specific file located at "/dacx/var/ameyo/dacxdata/etc/amds/1.6/amd.conf." Unfortunately, this file path is hardcoded within the AMD code, making it unchangeable after AMD is compiled.

From Asterisk's Perspective:

1. **Socket Communication:** When Asterisk encounters an AMD extension, it creates a socket connection to AMD using the predefined path.
2. **Sending Frames:** Once the socket connection is established, Asterisk sends an Asterisk frame from the channel to AMD.
3. **AMD's Response:** AMD processes the received frame and responds back to Asterisk with one of the following outcomes:
    - AM (Answering Machine): AMD identifies the call recipient as an answering machine.
    - HUMAN: AMD detects that a live human has answered the call.
    - CONTINUE: If the response is not clear, AMD requests additional frames from Asterisk to continue analyzing the call.
4. **Extension Handling:** Based on the AMD response, Asterisk takes appropriate action. If it receives AM or HUMAN, it moves on to the next extension. If it gets CONTINUE, it sends more frames to AMD until a conclusive response (AM or HUMAN) is received or a timeout occurs.

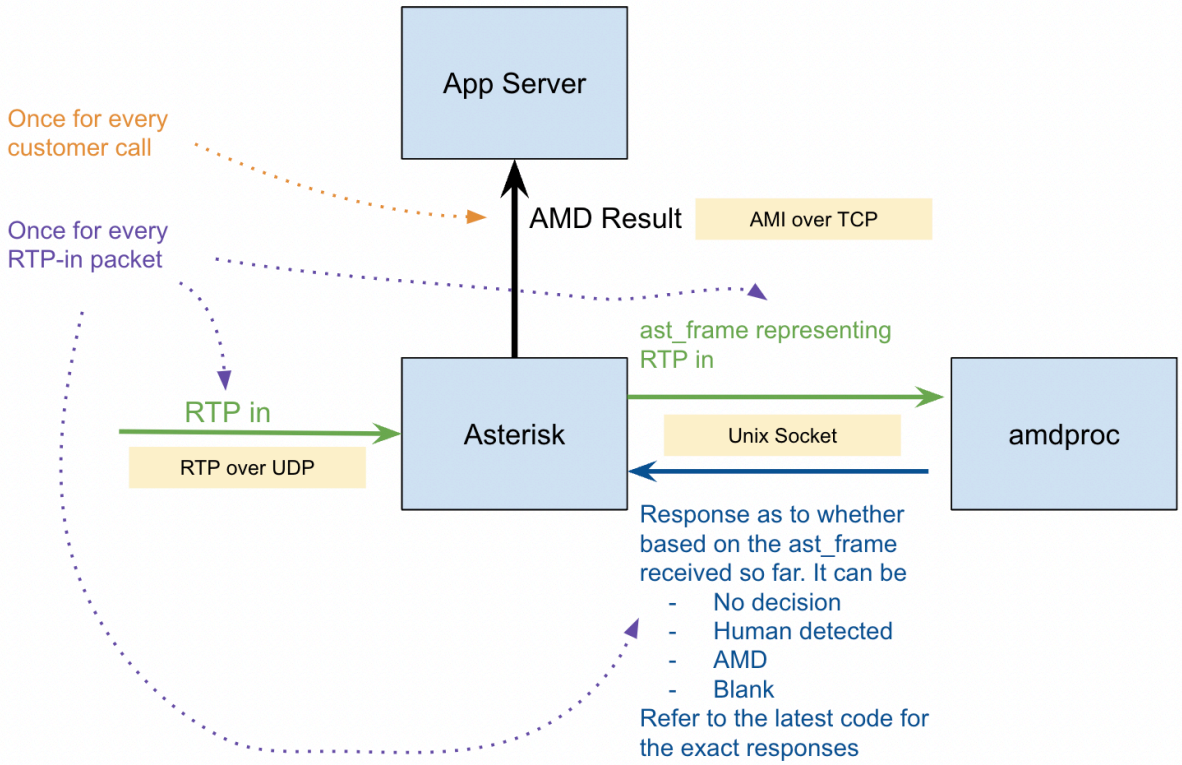
From AMD's Perspective:

1. **Socket Listening:** When AMD starts, it creates a local socket at the path "/dacx/var/ameyo/dacxdata/var/amds/1.6/amd.ctl" (Note that, similar to the AMD configuration, this socket path is also hardcoded and cannot be changed).
2. **Thread Creation:** Whenever AMD receives a request from Asterisk, it creates a new thread for each request. This means that AMD can handle multiple requests concurrently, as it creates as many threads as the number of AMD detection requests it receives.
3. **Answering Machine Detection:** AMD then starts its answering machine detection process for each connected client (Asterisk).
4. **Polling and Conclusion:** During the answering machine detection process, AMD polls the incoming frames from the socket until it reaches a conclusion regarding whether the call recipient is an answering machine or a human.
5. **Timeout Handling:** If AMD cannot make a clear determination within a certain time (timeout), it assumes a human has answered the call and responds accordingly.

Flow Diagram

Note

- For single customer channel on which AMD is running. Consider multiplication for multiple channels
- Diagram explains SIP-RTP channel. Consider similar flow for PRI also



'

Answering Machine Detection (AMD) Algorithm

1. **Fetching and Computing Data:**
    - AMD fetches each unit of audio data (packet) from a socket and calculates its energy level.
    - If AMD cannot confidently determine the result based on the current fetched data, it reads more data from the socket.
2. **Energy Level Thresholds:**
    - AMD divides the energy levels into three regions: Noise, Signal, and Intermediate.
    - If the energy of a data unit is below a certain threshold (noise threshold), AMD classifies it as noise.
    - If the energy is above another threshold (signal threshold), AMD classifies it as a signal (i.e., not noise).

- If the energy is between the noise and signal thresholds, the data is temporarily categorized as "Intermediate."

3. **Circular Buffer for Packet States:**
   - For every packet, AMD stores its computed state (noise, signal, or intermediate) in a circular buffer.
   - This buffer helps AMD detect a continuous block of high-energy packets, referred to as an "utterance" (akin to a single word).
4. **Detecting Utterances:**
   - After processing each packet, AMD checks the circular buffer to determine if an utterance has started.
   - An utterance is considered a single block of continuous high-energy packets (a word).
5. **Determining Utterance Boundaries:**
   - To determine the end of an utterance (word), AMD looks for a low-energy packet after detecting an utterance start.
   - The time between utterance start and utterance end is stored in AMD's data structure.
6. **Smoothing Noise and Signals:**
   - After processing each packet, AMD smooths the noise and signals to achieve more accurate results.
   - Smoothing helps in considering the minimum utterance duration for better word recognition.
7. **Decision Making:**
   - With information about utterance start and end times, AMD makes decisions based on specific criteria.
   - Examples of decisions include:
   - If AMD detects too many words, it returns "Answering machine."
   - If the number of words per given time interval is high, it returns "Answering machine."
   - If the length of a word is larger than the maximum allowed threshold, it returns "Answering machine."

- If the time gap between the end of the first word and the start of the second word is greater than the "hello silence threshold," it returns "Human."
- If the first word starts very late, it indicates "Answering machine."

Limitations

- AMD systems are not 100% accurate and can sometimes misclassify a live person as a machine ("false positive"), resulting in a dropped call.
- There can be a slight pause at the beginning of the call as the system analyzes the audio.

AMD FAQs

1. **Why is Answering Machine Detection used?**

The primary reason for using AMD is to boost the efficiency of contact center agents and reduce operational costs. By automatically identifying and handling machine responses, AMD allows agents to focus their time on live conversations with potential customers, leading to better engagement and potentially higher conversion rates. This technology is also valuable for optimizing outreach in various communication platforms across sectors like healthcare and finance.

2. **How does Answering Machine Detection work?**

AMD systems typically employ techniques such as audio signal processing, natural language processing, and silence detection to make accurate determinations. They analyze factors like ringing time, silence between phrases, and keywords in greetings. When a call is picked up, the system analyzes the initial audio. If a human is detected, the call is connected to an agent. If a machine is detected, the system can either disconnect the call, leave an automated message, or connect to an agent, depending on the configured workflow.

3. **Why is Answering Machine Detection particularly relevant now?**

AMD has become increasingly relevant due to the rising number of voicemail subscribers, the significant growth of digital assistants and voicebots, and features like voicemail becoming a default on many devices like iPhone. The launch of features like Truecaller Assistant, which screens incoming calls using a voicebot, also highlights the prevalence of automated call answering systems. This increase in non-human call responses makes AMD

crucial for efficiently managing outbound communications and maximizing agent productivity.

4. **What are the key benefits of using Ameyo AMD?**

Ameyo AMD offers several benefits, including improved agent productivity by eliminating time spent on voicemails and assistants, and an improved agent experience by reducing frustration in outbound calling processes. It also leads to increased lead coverage by automatically handling machine-attended calls and reduces the overall cost of operations by optimizing agent utilization. Furthermore, Ameyo AMD can be optimized to specific business requirements with configurable sensitivity and customizable workflows. It is available as a default feature in both 4.x and 6.x versions and is language agnostic, as it detects based on silence, pitch, tonal analysis, and rate of speech rather than spoken words.

5. **How can Ameyo Answering Machine Detection be used?**

To use Ameyo AMD, you need to contact your Customer Success Manager (CSM) to activate the license. Once activated, you can navigate to your Outbound Campaign settings and enable AMD. After activation, AMD will be applied to all automated calls dialed from that campaign, and detailed reports on the outcomes will be available. The default behavior is to disconnect the call if a voicemail, digital assistant, or voicebot is detected.

6. **What customization options are available with Ameyo AMD?**

Ameyo offers several customization options for AMD as add-ons that can be enabled for each individual campaign. These include different workflows such as the default disconnect, leaving a voicemail, connecting to an agent, or providing manual dial support. These workflows can be combined with different types of dialing (automated or manual/Click-to-Dial). The benefits and operating costs associated with each customization also vary, allowing businesses to tailor the AMD behavior to their specific needs and objectives. For detailed customization options and pricing, you need to reach out to your CSM.

7. **What should I do to start using Ameyo Answering Machine Detection?**

To start using Ameyo Answering Machine Detection and improve the returns of your outbound processes, you should immediately reach out to your Customer Success Manager (CSM). They will assist you in enabling the default AMD flow. This will allow you to begin benefiting from reduced operational costs and improved agent productivity right away.

Version History

Version	Enhancement	Release Notes
4.13.33	AMD support extended to Preview and Manual Dial flows	**Contact Center - Patch Release Notes - Version 4.13.33**

5.3.3. Dial Timeout Configuration

Overview

Dial Timeout is a setting in outbound campaigns that defines the maximum amount of time (in seconds) the system will let a call ring before considering it unanswered. This feature is essential for preventing the dialer from wasting time on calls that will not be picked up.

How It Works

When the dialer places an outbound call, it starts a timer. If the call is not answered by a person or an answering machine within the specified timeout period, the system will automatically disconnect the call and disposition it as "No Answer." It then moves on to the next number in the list.

Prerequisites

- An outbound campaign must be using an automated dialing mode like Predictive or Progressive.

Configuration Steps

- **Set Dial Timeout:**
  - **Location:** Administrator > Manage > [Campaign Name] > General Configuration
  - **Action:** Enter a numerical value in the **Dial Timeout (Seconds)** field. A typical value is between 25-30 seconds.

Use Cases

- **Campaign Efficiency:** A campaign manager sets the dial timeout to 28 seconds to balance giving customers enough time to answer with the need to move quickly through the lead list.
- **Preventing Voicemail Hang-ups:** Setting a timeout that is shorter than the average time it takes for a call to go to voicemail can reduce the number of voicemails the dialer encounters.

Benefits

- **Increases Dialer Efficiency:** Ensures the dialer doesn't waste resources by waiting too long on unanswered calls.
- **Improves Pacing Accuracy:** A well-configured dial timeout provides more predictable data for predictive dialing algorithms.
- **Enhances Agent Productivity:** By quickly moving past unanswered numbers, the system can serve more potential live calls to agents.

Limitations

- Setting the timeout too short may result in disconnecting the call just as the customer is about to answer, leading to a missed opportunity.

5.3.4. Outbound Call Context Policies

Overview

Outbound call context policies control how the platform **chooses a customer call context** (voice path and related resources) for each outbound dial attempt—for example progressive or preview dialing, manual dial, or flows that originate a customer leg from a campaign.

Administrators and flow designers pick a **policy type** and related campaign or failover settings so that each call uses an **available** context within limits, follows **priority** when you want primary then secondary paths, or follows **round-robin** rules when several contexts are valid.

How It Works

1. **Choose the policy for the campaign (or dial profile)**
   In voice campaign configuration, you assign an **outbound call context determination** policy. The platform loads that policy when a dial is placed unless a **named policy** is supplied for that specific dial (advanced or integration scenarios).
2. **Policy evaluates candidates**
   For each dial, the policy considers configured call contexts, **availability**, **utilization limits**, optional **voice resource** constraints, and—where applicable—**destination number** patterns. It picks one context for the customer leg or marks the attempt failed if nothing qualifies.
3. **Automatic retry inside one dial step**
   Only the **Multiple try round robin** policy type enables an **automatic second originate** inside the same step when the customer leg fails **before ringing**. Other policy types—including **Failover**—do **not** perform that in-step automatic retry; the attempt may end in a dial-failed style outcome unless your **flow** triggers another dial.
4. **Customer Usecases**

- **Every new call:** Use **Failover** policy, put **primary** customer contexts at **priority 1** and **secondary** at **priority 2**, and complete **failover mapping** (campaign, voice resources, customer and agent contexts as required by your deployment).

- **Same logical flow, try secondary after a failure:** Chain **two** originate or dial steps on the **same** flow instance: the first attempt uses Failover (usually primary); on the configured failure transition, the second step runs determination again so the temporary unavailable list can steer traffic to **secondary**—confirm in your environment that the list persists between those steps.

For Partners and Professional Services Team

1. **Temporary “down” contexts on the same session**
   During **one** outbound session (same logical flow instance), contexts that already failed or timed out can be added to an internal **temporary unavailable** list. Later steps in **that same flow** skip those contexts so a follow-up dial can move to the next priority or the next round-robin choice.
   Important: That list is tied to the **current session**. A **new** outbound call starts with a **fresh** list, so a primary path can be tried again on the next call.
2. **Early dial failure vs no-answer**
   If the customer leg **fails before ringing** (for example setup or routing failure), the failed context is typically added to the temporary unavailable list **regardless** of other preferences.
   If the call **rings** and ends as **no answer**, whether the context is added to the temporary list depends on the `failoverNoAnswerTempDown` preference (see the note below the configuration table).

Prerequisites

- **Administrator** (or equivalent) access to **voice campaigns**, **call contexts**, and **voice resources**.
- **Failover** setups require failover relationships and mappings to be defined consistently with your voice architecture (including any constraints such as contexts on the **same** call server where the product requires it).
- For **advanced flows**, a **node flow** (or integration) that can branch on dial failure or no-answer when you need multi-step retry behavior.

Configuration Steps

- **Location:** Voice campaign (and dial profile, if your product separates policy by profile) – outbound / call context determination area.

Action: Select one **policy type** (see table below). Save or publish per your change-management process.

- **Location:** Failover configuration for the campaign (customer and agent call contexts, voice resources, priorities).
  Action: For **Failover** policy, assign **priority 1** to primary and **priority 2** (or higher) to secondary paths; verify mappings for each voice resource you use.
- **Location:** Server preference store — scope as supported in your hierarchy (**system**, **contact center**, or **campaign**).
  Action: Set the `failoverNoAnswerTempDown` preference when you need to control whether **no-answer** adds contexts to the temporary unavailable list for **further steps on the same session** (see the note below the configuration table).
- **Location:** Node flow designer (optional).
  Action: If you need **secondary after failure** inside one business process, add a second **Originate** or **Dial** after the failure transition and validate transitions (for example dial failed vs no answer) match your disposition design.

Configuration parameters

Key / parameter	Description	How to configure	Constraints & options	Sample
`basic.single.call.context.type`	**Basic single** – exactly one configured call context; validates availability, limits, and optional voice resource match.	Voice campaign outbound call context policy: select **Basic single** (or equivalent label) and assign the single context.	One primary context; must remain within utilization and availability rules.	One customer call context tied to the campaign.
`basic.multiple.call.context.type`	**Basic multiple** – round-robin over configured contexts; first that is available and under limits wins.	Policy: **Basic multiple**; list or assign the pool of contexts.	Order is round-robin across eligible contexts.	Three customer contexts in rotation.
`multiple.try.round.robin.call.context.type`	**Multiple try round robin** – round-robin with **retry on early customer-leg failure** inside the same dial step when the product enables multiple-try for this policy only.	Policy: **Multiple try round robin**; configure the context pool.	**Only** this policy type gets **automatic in-step retry** on **initialized** (pre-ring) failure; selection remains round-robin, not strict priority.	Two contexts A/B; A fails pre-ring → automatic retry may attempt B.
`phone.based.call.context.type`	**Phone-based** – maps destination numbers or patterns to call contexts and allowed voice resources.	Policy: **Phone-based**; maintain number or pattern to context mapping per product UI.	Depends on numbering plan and DID patterns.	Route `+1-800-…` to context “Tollfree-A”.

Key / parameter	Description	How to configure	Constraints & options	Sample
`failover.call.context.type`	**Failover** – **priority-ordered** customer (and agent) contexts; respects temporary unavailable list and physical media ordering where applicable. Best for **primary** → **secondary** by priority.	Policy: **Failover**; set priority rows and failover campaign ↔ voice resource ↔ context mappings.	Does **not** auto-retry on pre-ring failure inside one step like multiple-try; use flow design for a second dial.	Priority 1 = primary CC; priority 2 = backup CC.

`failoverNoAnswerTempDown` – Server preference key: `failoverNoAnswerTempDown`. Configure in the **server preference store** at the hierarchy your deployment supports (**system**, **contact center**, or **campaign**), alongside other voice campaign parameters. When **true** (typical default), a **no-answer** outcome (rang, then disconnected) adds the relevant call context(s) to the **session** temporary-unavailable list so later determination on **that same flow instance** skips them—for example after a second **Originate** or **Dial** on a no-answer branch. When **false**, no-answer does **not** add to that list. **Applies to no-answer only**; it does **not** change pre-ring failure behavior and does **not** by itself trigger a retry. Sample: `true`.

If `failoverNoAnswerTempDown` is **true**, no-answer contributes to temporary unavailability for **any follow-up determination on the same node flow instance**—for example a second originate after no-answer.

`TEMP_UNAVAILABLE_CALL_CONTEXT_IDS_LIST` *(advanced)* – Session-scoped list of call context identifiers the engine should skip until the session ends or the list is cleared. It is usually maintained by the platform during dial outcomes; integrators or advanced node flows may read or pass it only where your product version documents it—not a typical administrator form field. Cleared for **new** calls or sessions; there is **no** time-based expiry in standard behavior—the scope is the **current** flow instance. Leave default unless you follow a certified integration pattern.

Use Cases

- **Stable single trunk or context** – Use **Basic single** when one outbound path is always correct.
- **Load spread** – Use **Basic multiple** or **Multiple try round robin** when you want rotation across several eligible contexts.
- **Disaster recovery / backup route** – Use **Failover** with explicit priorities; optionally add a **second dial step** in the flow after failure.
- **Geographic or product-line routing by dialed number** – Use **Phone-based** when the destination number should decide the context.

Benefits

- **Predictable priority** – Failover aligns with “try primary, then secondary” operations.
- **Operational flexibility** – Policy choice is configuration- and flow-driven; no code deployment required for most scenarios.
- **Clear knobs** – The `failoverNoAnswerTempDown` preference separates **no-answer** behavior from **pre-ring failure** behavior for the temporary unavailable list.

Limitations

- **Failover** does **not** combine strict priority with **automatic in-step retry on pre-ring failure**; only **Multiple try round robin** does, and that policy uses **round-robin**, not strict primary-first ordering for every retry.
- **Temporary unavailable** is **per session**, not a timed global ban; the next **new** call can select primary again.
- **Chained dial steps** depend on correct **flow transitions** and on the temporary list **persisting** across the steps your design uses—validate end-to-end in your environment.
- **Configuration alone** cannot enable “Failover + automatic in-step retry on pre-ring failure”; that combination requires the **Multiple try round robin** policy (with its selection semantics) or an explicit second dial in the flow.

Related Topics

- **Call Routing** – Incoming routing policies and plans (related concepts: call context profiles, DID and source routing).
- **Auto Dial** – Agent experience for outbound auto-dial and preview behaviors.
- **Queue Management** – When outbound or blended behavior ties to queue and campaign setup.

5.4. Lead & List Management

5.4.1. Lead List Upload & Allocation

Overview

This feature allows supervisors and administrators to upload lists of customer contacts (leads) into an outbound campaign and manage how those leads are allocated. This is the foundational step for any proactive outbound dialing activity.

How It Works

A user with appropriate permissions navigates to the Lead Management section of a outbound campaign. They can upload a lead list, typically from a CSV file, mapping the columns in the file to the corresponding fields in the system's CRM (e.g., Name, Phone Number, Account ID). The system ingests these leads and adds them to the campaign's dialing queue. The supervisor can then see the total number of leads, reset lists, or monitor their status.

Prerequisites

- An Outbound Voice Campaign must be created.
- A lead list must be prepared in a supported file format (e.g., CSV).

Use Cases

- **New Sales Campaign:** A marketing manager uploads a list of 5,000 new prospects to be called by the sales team.
- **Customer Survey:** A customer service manager uploads a list of recent customers to be called for a satisfaction survey.
- **List Re-run:** A supervisor resets and re-uploads a list of leads that were not successfully contacted during the previous day's campaign.

Usage Instructions/Configuration Steps

Lead Management in Process level (Supervisor Interface)

The **Lead Management** section allows Supervisors to create, edit, delete, upload, and assign leads to campaigns within a specific process.

```
Navigation Path:

Sidebar → Process Settings → Manage Lead


Note: Leads created or uploaded under one process are not shared with any other process.
```

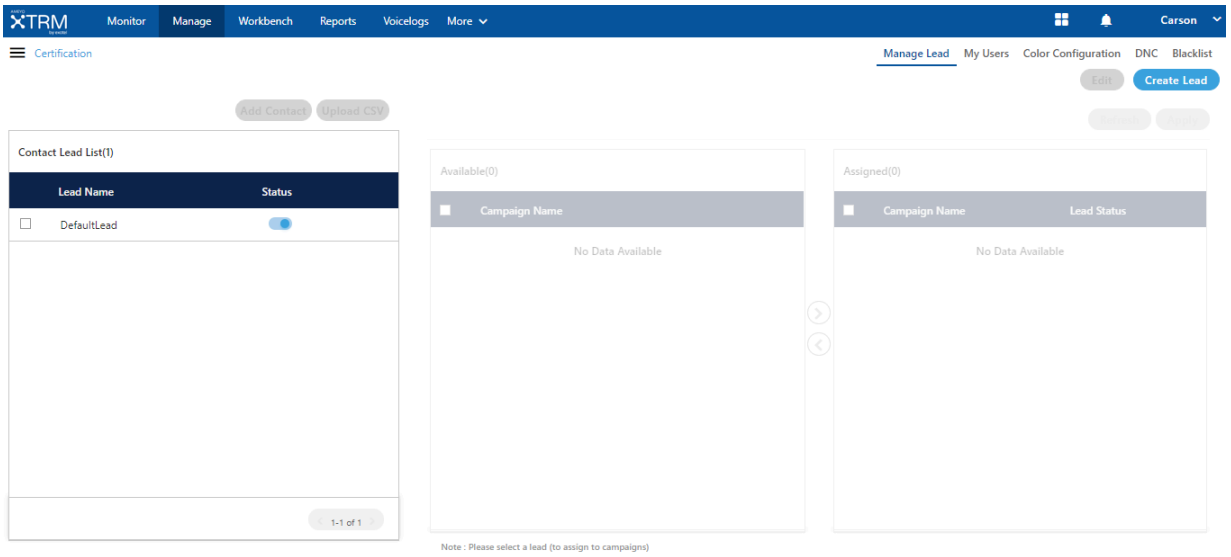


Figure: Manage Leads

Creating a Lead

Supervisors can create new leads at the **process level** (not at the campaign level).

1. Click **Create Lead**. A pop-up window appears prompting you to enter lead details.
2. Provide the following information:
    - **Lead Name**
    - **Time Zone**
    - **Lead Owner**
    - **Description**

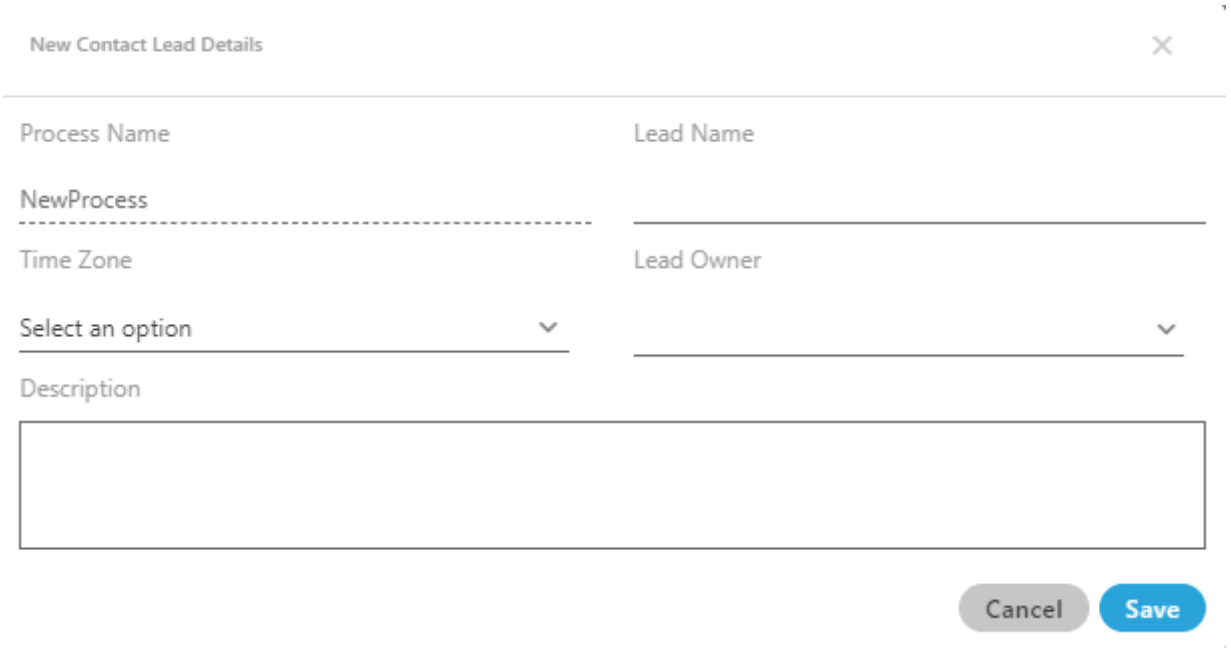


Figure: Create a Lead

3. Click **Save** to create the lead, or **Cancel** to discard changes.

`Note: Multiple leads can be created within a single process.`

Editing a Lead

1. Select the desired lead and click **Edit**.The **Edit Lead** modal appears.

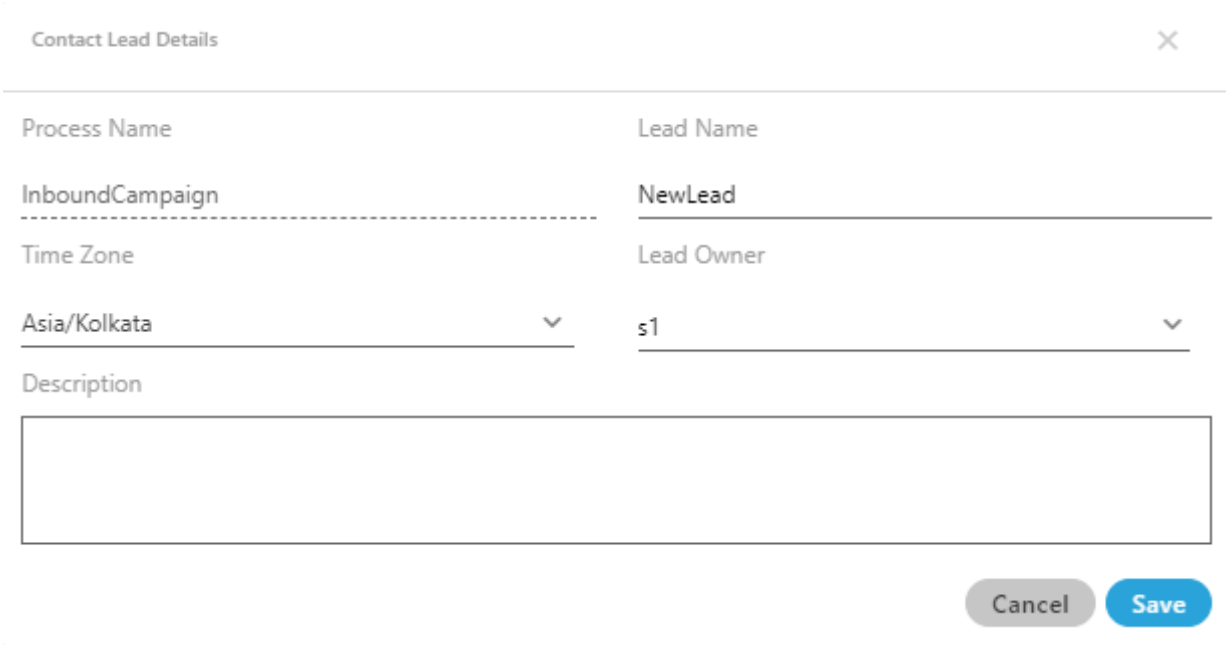
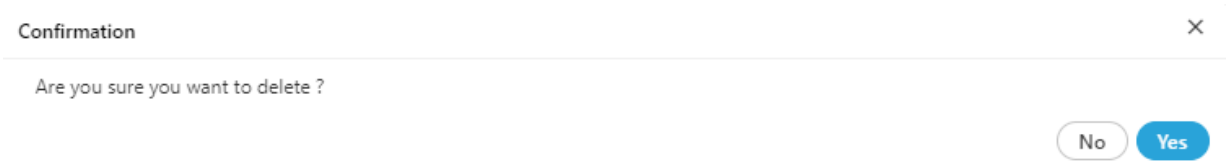


Figure: Edit the Lead

2. Update any of the following fields:(The **Process Name** cannot be changed.)
    - Lead Name
    - Time Zone
    - Lead Owner
    - Description
3. Click **Save** to confirm or **Cancel** to discard changes.

Deleting a Lead

1. Select the lead to delete and click the **Delete (🗑)** icon.A confirmation dialog appears.



2. Click **Yes** to confirm, or **No** to cancel.

```
Caution: Deleted leads cannot be restored.
```

Enabling or Disabling a Lead

- To **disable** an active lead, click the **green toggle switch**.

- To **enable** a disabled lead, click the **gray toggle switch**.

This allows Supervisors to temporarily deactivate leads without deleting them.

Uploading Leads via CSV

Supervisors can bulk upload contacts into leads using a **CSV file**.

```
Recommendation: Use a CSV file that follows the same field order and schema as defined by the Administrator under: Console → System Configuration → Table → Table Definition
```

This ensures data integrity and smooth import.

CSV File Rules

- Follow the defined **Character Type**, **Nullable**, **Unique Key**, and **Primary Key** configurations.
- Ensure data formatting matches the field types set by the administrator.

Steps to Upload a CSV File

1. Select the lead in which the data should be uploaded.
2. Click **Upload CSV**. The **Upload CSV** pop-up appears.

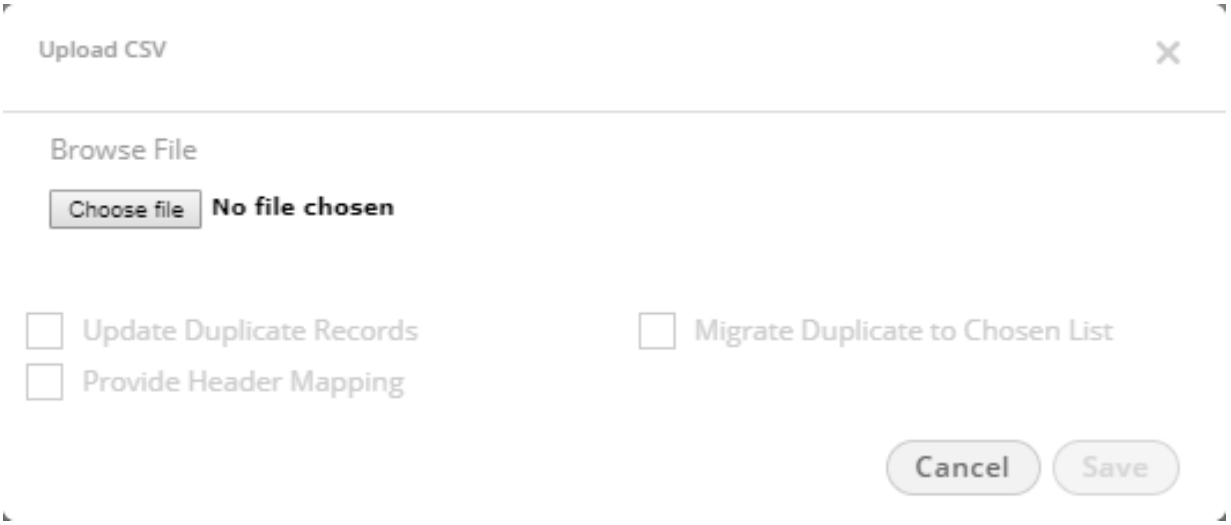


Figure: Upload Lead (Numbers) through a CSV file

3. Click **Choose File**, select the desired CSV from your disk, and click **Open**.

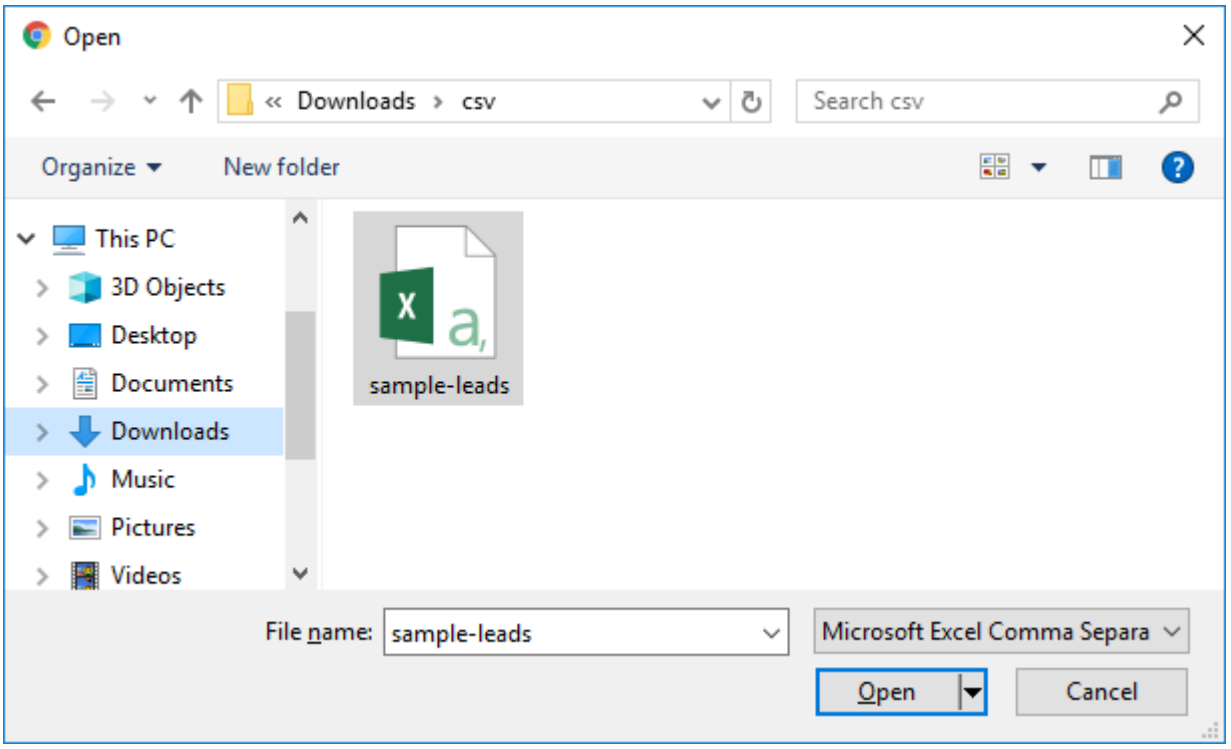


Figure: Select CSV file

4. Configure the following options before uploading:**Upload Parameters**
    - **Update Duplicate Records**Updates existing entries (if the same contact already exists) with new details.
        - If duplicate exists in a different lead → updates that lead only.
        - If duplicate exists in the same lead → record is updated, not duplicated.
    - **Migrate Duplicate to Chosen List**Moves duplicates from other leads of the same campaign into the new lead, carrying updated information.
    - **Provide Header Mapping** Map CSV headers to lead attributes like:Phone1, Phone2, Phone3, Phone4, Phone5, Timezone, Name

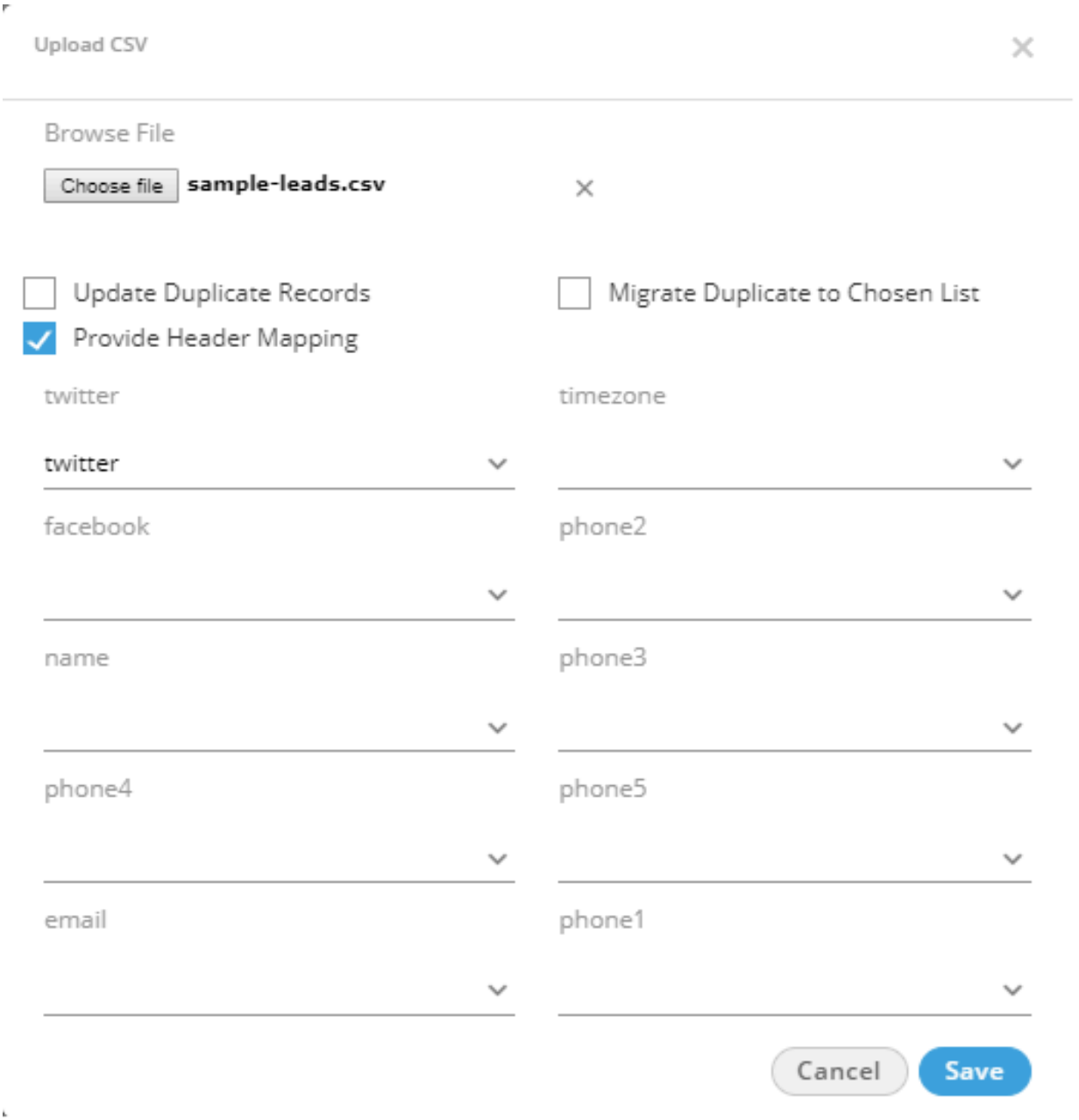


Figure: Mapping of Column Headers

5. Click **Save** to upload or **Cancel** to abort.

Tip: Enable the **"Churn Records"** option while uploading to process existing records as per churn logic.

Figure: Churn Records Option

Adding a Contact Manually

Supervisors can manually add individual contacts to a lead.

1. Select the desired lead and click

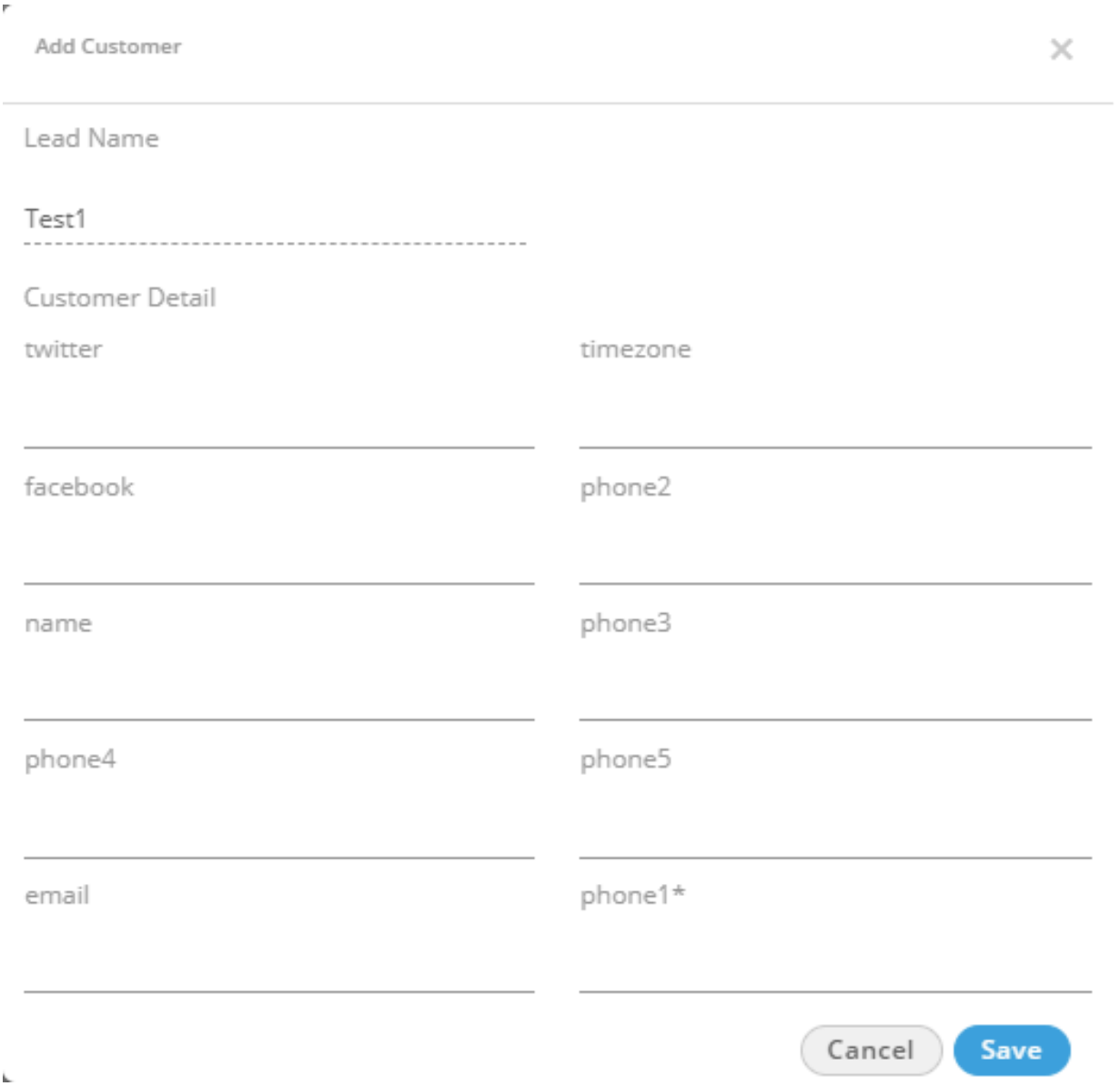


Figure: Add a Contact

2. Enter the following details as required:
    - Name
    - Email
    - Phone Numbers (up to 5)
    - Twitter or other contact fields
3. Click **Save** to confirm, or **Cancel** to discard.

Assigning or Unassigning Leads to Campaigns

Leads must be assigned to campaigns before they can be used for calling or interactions.

1. Select a lead. The associated **campaigns list** appears on the right side.

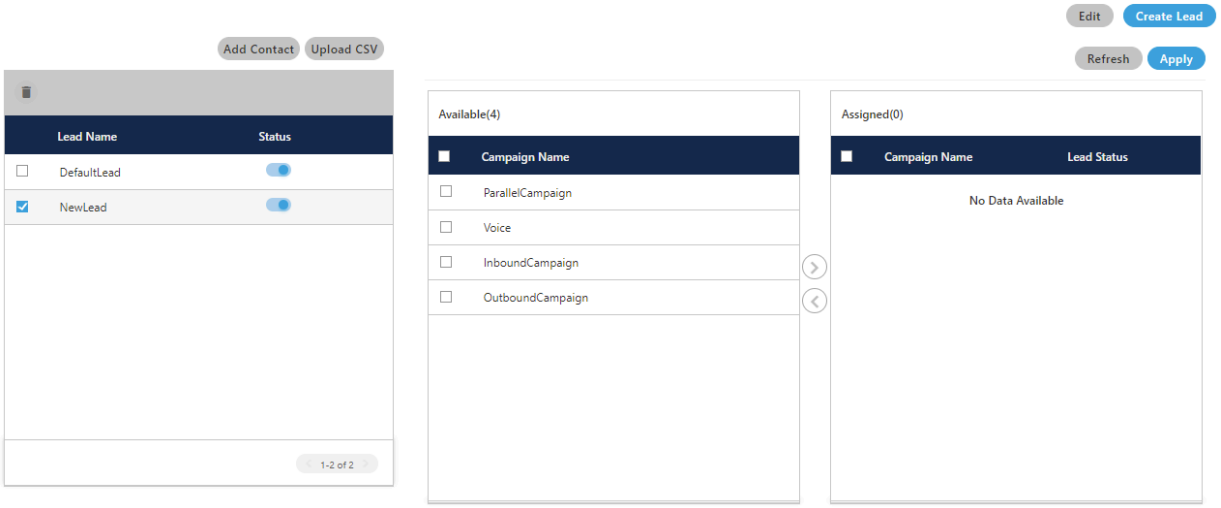


Figure: Assign or Un-assign Campaigns

2. In the **Available** section:
    - Select one or multiple campaigns using checkboxes.
    - Click the **right-arrow (→)** icon to assign.
3. Click **Apply** to save changes.

To **unassign**, select campaigns in the **Assigned** section and click the **left-arrow (←)** icon.

Click **Apply** again to confirm.

Special Case:

Handling Blank "Name" Fields

If the **Name** field in the Data Table Definition is:

- **Optional**, and
- **Configured as Unique**,

previously, leads with blank customer names might fail to upload for duplicate validation.

This issue has been **resolved** - now, leads with blank names upload successfully even if the field is marked unique.

Unassigned Lead Behavior

If a lead is unassigned from a campaign:

- The **STATE** of its customers is **lost**.

- The data becomes unavailable in the campaign view.
- The lead's records will no longer appear in campaign-level reports.

Making New Leads Visible in Manage Contacts & Dashboard

To ensure new leads and uploaded contacts appear in both **Manage Contacts** and **Dashboard**, follow these steps:

1. Create a new lead and upload contacts to it.
2. Assign the lead to at least one campaign.
3. **Enable** the lead.
4. Go to **Manage Lead → Enable Lead** at the campaign level.
5. Navigate to **Manage Contacts** under Lead Management and perform a **Churn** without applying any filter.

The uploaded contacts will now be visible on both:

- **Manage Contacts Screen**, and
- **Dashboard Screen**.

Benefits

- **Enables Proactive Outreach:** Provides the core functionality for populating outbound campaigns with contacts to be dialed.
- **Centralized List Management:** Offers a single place to manage all aspects of a campaign's lead list, from uploading to monitoring and resetting.
- **Data Integration:** The field mapping process ensures that data from external files is correctly imported into the system's CRM fields.

Limitations

- The quality of the uploaded lead list (e.g., correct phone numbers, accurate data) directly impacts the success of the outbound campaign. The system can only dial the numbers it is given.

5.4.2. Campaign Wise Max Call Attempts

Overview

This feature controls the maximum number of times the system will attempt to call a specific phone number within a lead list. It is crucial for preventing customer harassment and for maintaining the efficiency of a campaign by not wasting resources on unreachable numbers.

How It Works

A supervisor sets a numerical limit for call attempts in the campaign configuration. Once the dialer has attempted to call a number and has failed to connect for the specified number of times, it will automatically disposition that number as "MAX ATTEMPT REACHED" and will not attempt to call it again.

Prerequisites

- An Outbound Voice Campaign must be created.

Configuration Steps

- **Set Maximum Call Attempts:**
  - **Location:** Supervisor > Manage > [Campaign Name] > Lead Management
  - **Action:** In the Lead Management section, enter a numerical value into the **Maximum Call Attempts** field. This will define the limit for the entire campaign.

Use Cases

- **Regulatory Compliance:** In regions with strict regulations about call attempts, this feature is used to ensure compliance by limiting retries.
- **Campaign Efficiency:** A campaign manager sets the limit to 3 or 5 attempts to avoid wasting dialer time on numbers that are consistently unreachable.

Benefits

- **Ensure Regulatory Compliance:** Helps organizations adhere to telemarketing regulations by providing a hard limit on call attempts.
- **Improve Campaign Performance:** Prevents the dialer from wasting resources on unproductive numbers, allowing it to focus on fresh leads.
- **Protect Brand Reputation:** Avoids harassing potential customers with excessive calls, which can damage the company's brand.

Limitations

- The limit is applied at the campaign level and does not differentiate between different types of call failure (e.g., Busy vs. No Answer) unless specific dispositions are configured separately.

5.4.3. DNC (Do Not Call) List Management

Overview

Do Not Call (DNC) List Management allows supervisors to upload and manage lists of phone numbers that should be excluded from outbound dialing campaigns. This is a critical feature for ensuring compliance with national and regional DNC registries and respecting customer communication preferences.

How It Works

A supervisor uploads a list of numbers to the campaign's DNC list. Before the dialer places an outbound call to a number from the lead list, it first cross-references it against the campaign's DNC list. If a match is found, the dialer will automatically skip that number, preventing the call from being made.

Prerequisites

- An Outbound Voice Campaign must be created.
- A DNC list must be available in a supported file format (e.g., CSV).

Configuration Steps

- **Manage DNC List:**
  - **Location:** Supervisor > Manage > [Campaign Name] > Lead Management
  - **Action:**
    1. Click the **DNC** tab within the Lead Management section.
    2. Use the **Upload** button to add a new list of DNC numbers.
    3. Use the **Download** button to export the existing DNC list for the campaign.

Use Cases

- **Regulatory Compliance:** A company uploads the national DNC registry for their country to ensure they do not illegally contact registered individuals.

- **Customer Preference:** A customer tells an agent "Do not call me again." The agent adds the customer's number to an internal DNC list, which is then uploaded to all campaigns.

Benefits

- **Ensures Legal Compliance:** Provides a vital tool to help organizations comply with telemarketing laws like the TCPA, avoiding significant fines.
- **Respects Customer Wishes:** Honors requests from customers who do not wish to be contacted, improving customer relations.
- **Increases Campaign Efficiency:** Prevents the dialer from wasting time on numbers that should not be called, focusing efforts on receptive leads.

Limitations

- DNC lists must be regularly updated to remain compliant and effective.
- This feature functions at the campaign level; a separate system-wide Blacklist is used for blocking numbers across all campaigns.

5.5. Specialized Outbound Campaigns

5.5.1. Voice Blast Campaign

Overview

A Voice Blast Campaign is a specialized outbound campaign designed to deliver a pre-recorded audio message to a large list of contacts simultaneously. It is a form of automated, one-way communication that does not typically involve live agent interaction.

How It Works

An administrator sets up a Voice Blast campaign using a quick-start guide. This involves uploading a lead list and an audio file. The campaign then uses a Fixed Pacing dialing mode to call all the numbers on the list at a constant rate. When a call is answered by a person or an answering machine, the system plays the pre-recorded audio message and then disconnects.

Prerequisites

- A lead list must be available.
- A pre-recorded audio message must be available in a supported format.

Configuration Steps

- Campaign Setup:
  HUMAN REVIEW NEEDED: The configuration is not done through standard menus but by following a specific guide, which requires review.
  - **Location:** Administrator > System > Quick Startup Guides
  - **Action:** Follow the **Quick Startup Guide for Voice Blast Campaign** to correctly configure the campaign, lead list, and audio prompt.

Use Cases

- **Public Service Announcements:** A local government sends a voice blast to residents about an upcoming road closure or a weather emergency.

- **Appointment Reminders:** A clinic sends an automated call to remind patients of their appointments for the next day.
- **Promotional Alerts:** A retail store sends a voice blast to its loyalty members announcing a major one-day sale.

Benefits

- **Efficient Mass Communication:** Provides a fast and cost-effective way to deliver a consistent message to a large number of people.
- **Agentless Operation:** Frees up live agents from the repetitive task of delivering simple, informational messages.
- **Guaranteed Message Consistency:** Every recipient hears the exact same pre-recorded message, eliminating the risk of agent error or variation.

Limitations

- Voice blasting is often subject to strict regulations (e.g., TCPA). It must be used responsibly and in compliance with all applicable laws.
- As a one-way communication channel, it does not allow for customer interaction or questions.

6. Call Handling Capabilities

6.1. Core Telephony Actions

6.1.1. Call Conference

Overview

Call Conference, or a three-way call, enables an agent to add a third person to a live call with a customer. This third person can be another agent, a supervisor, or an external subject matter expert.

How It Works

While on a two-party call, the agent uses their call controls to initiate a conference. They dial the number of the third person and, once connected, can merge the calls, allowing all three parties to speak with each other.

Prerequisites

- The agent must be on a live call.

Steps

- **Initiating a Conference (Agent):** This is a standard feature on the agent's call control panel.
    - **Location:** Agent > Agent Console > Call Control Panel
    - **Action:**
        1. During a live call, click the **Conference** button.
        2. Dial the number of the third party you wish to add.
        3. Once the third party answers, click the **Conference** button again to merge the calls.

Use Cases

- **Supervisor Assistance:** An agent conferences in their supervisor to de-escalate a call with an irate customer.
- **Language Translation:** An agent conferences in a translator to assist with a customer who speaks a different language.
- **Expert Consultation:** A sales agent conferences in a technical expert to answer a customer's detailed product questions.

Benefits

- **Real-time Problem Solving:** Allows for on-the-spot collaboration to resolve complex customer issues.
- **Enhanced Agent Training:** A supervisor can join a call to guide a new agent through a difficult interaction in real-time.
- **Improved Customer Satisfaction:** Bringing an expert directly into the conversation provides immediate, accurate answers.

6.1.2. Call Picking

Overview

The Priority Queue Call Picking application is a custom feature designed to allow **Executive** users to manually select and answer a high-priority customer call directly from a shared queue, bypassing the standard Automatic Call Distribution (ACD) flow.

This tool provides granular control to a specific class of users for ensuring critical or premium customer interactions are handled immediately, independent of the agent's current Auto Call status or standard queue-based distribution logic.

How It Works

The application works by presenting a filtered view of the active queue to the Executive user, who can then initiate a connection to a specific waiting call.

1. **Queue Access:** Every logged-in user who is assigned to a queue will receive calls for their respective queues. The application allows the agent to filter the queues based on their choice.
2. **Prerequisite Check:** To use the **Pick Call** function, the Executive must be in **Break mode**.
3. **Active Call Resolution:** If the Executive is currently on a call, they must first end the current conversation and apply a proper disposition before attempting to pick a new call. They may also need to disable Auto Call (AutoCall off).
4. **Selection and Dial:** The application interface displays waiting calls with key details (Queue name, Waiting time, Phone/Customer name). The Executive can select a high-priority customer call and click the **Dial button** to immediately connect to that call.

Use Cases

Prioritizing Premium Customer Service:

- **Scenario:** An Executive is busy on a call, and the queue contains a call from a high-value or "premium" customer who cannot wait.

- **Action:** The Executive quickly ends their current call, enters Break mode, uses the Priority Queue Call Picking app to identify the premium customer's call, and immediately uses the Dial button to bypass the queue and connect instantly.

Benefits

- **Enhanced Customer Service:** Ensures that high-value or urgent customer calls are handled without the standard queue delay.
- **Executive Control:** Gives key personnel (Executives) the necessary control to intervene in the queue for critical business needs.
- **Flexibility in Call Flow:** Provides an exception mechanism to the standard ACD distribution to meet specific service level objectives for priority segments.

Limitations

- **User Role Restriction:**The feature is Not working for Professional Agent user roles. It is intended for Executive users.
- **Prerequisite Mode:**The "Pick Call" function can only be used when the agent is on Break mode.
- **No On-Call Notification:** If the agent is already on a call, no notification is displayed to the agent indicating they are on another call (which would prevent them from using the app).
- **Customer Name Display:**By default, customer name information is not displayed. To display the name, the Service team must modify the inbound IVR customer query node to pass the name based on the customer ID for each record.

6.1.3. Call Hold & Retrieve

Overview

Call Hold and Retrieve is a fundamental telephony feature that allows an agent to temporarily pause a live conversation without disconnecting the call. This gives the agent time to perform parallel tasks—such as finding information or consulting a colleague—before returning to the customer.

How It Works

When an agent is on an active call and needs a moment to step away from the conversation:

1. The agent clicks the **Hold** button (present on the telephony panel) on their Agent Console
2. The customer is placed on hold and typically hears hold music or a waiting message.
3. The agent's console updates to indicate the call is currently on hold.
4. To resume the conversation, the agent clicks the **Retrieve** (or Un-hold) button. *(Note: Time spent on hold is tracked as an agent activity for reporting and analytics.)*

Common Use Cases

- **Information Lookup:** An agent places a customer on hold to search for account details in the CRM, check inventory, or consult a knowledge base.
- **Internal Consultation:** An agent pauses the call to ask a supervisor or a peer for assistance with a complex or escalated query, ensuring the customer does not hear the internal discussion.

Key Benefits

- **Professional Call Handling:** Prevents "dead air" (awkward silence) on the line while the agent seeks information, maintaining a professional customer experience.
- **Increased First-Call Resolution (FCR):** Gives agents the necessary time to find accurate information or collaborate with experts, resolving the issue on the first try.

- **Improved Agent Efficiency:** Enables agents to multitask effectively during a live interaction, such as creating or updating a support ticket in the background.

Using the Feature

Prerequisites: The agent must be logged into the Agent Console and actively connected to a live call.

Instructions (Agent Console):

1. Navigate to the **Call Control Panel** within the Agent Console during an active call.
2. Click the **Hold** button to suspend the call.
3. Click the **Retrieve** button to bring the customer off hold and resume speaking.

> *(Note: This is a standard, out-of-the-box feature and requires no prior backend configuration by an Administrator.)*

Limitations

- While a call is on hold, the audio channel is suspended; the agent cannot speak with or hear the customer until the call is successfully retrieved.

6.1.4. Call Forwarding

Overview

Call Forwarding is a telephony feature that allows incoming calls to a specific number or extension to be automatically redirected to another destination. This destination can be an external phone number (like a mobile phone), another internal extension, or a voicemail box.

How It Works

An administrator or user configures IVR to forward calls. When the system receives a call for the original number, it checks the forwarding rule and immediately reroutes the call to the specified destination number.

Use Cases

- **After-Hours Service:** Forwarding main office lines to an on-call agent's mobile number after business hours.
- **Remote Work:** An agent forwards their desk phone extension to their home or mobile number while working remotely.
- **Unanswered Calls:** Setting up a rule to forward a call to voicemail if an agent does not answer their direct line.

Benefits

- **Increased Accessibility:** Ensures that important calls are never missed, regardless of an agent's location.
- **Business Continuity:** Allows for seamless call routing during outages or when employees are unable to be in the office.
- **Improved Customer Service:** Provides callers with continuous access to the organization.

Limitations

- Forwarding calls to external numbers may incur additional toll charges depending on the telephony plan.

6.1.5. Call Transfer - Queue

Overview

The Call Transfer to Queue feature allows an agent to reroute an ongoing inbound call to a different queue within the same voice campaign. This functionality is essential for ensuring that the customer reaches the most appropriate set of agents or department when the original routing was incorrect or the customer's query requires specialized handling.

How It Works

The agent initiates the transfer through the Telephony Panel, selecting a different destination queue to place the customer back into the Automated Call Distribution (ACD) system for reassignment.

Agent Workflow

- The agent is on a **live call** with a customer in an Inbound Campaign.
- The agent identifies that the customer should be handled by a different queue (e.g., the customer mistakenly selected the Sales queue instead of the Support queue in the IVR).
- The agent clicks the **(TRANSFER)** button on the Telephony Panel.
- The agent selects the option **"Transfer to Queue"** from the available transfer options.
- The agent selects the correct **Queue name** from the drop-down list.
- The call is then **re-routed** to the selected queue, where it will be distributed to an available agent staffed to that queue.

Use Cases

- **Rerouting Misdirected Calls:** This is primarily used when a customer has incorrectly selected a queue in the IVR (e.g., they selected the "Sales" queue but actually need "Support").
- **Skill-Based Escalation:** The feature is implied in scenarios where a customer needs assistance from agents with a specific skill set, and the current agent identifies the

appropriate specialized queue.

Benefits

- **Improved First Call Resolution (FCR) Potential:** By seamlessly rerouting the customer to the correct group, the customer is more likely to have their issue resolved without a second call.
- **Enhanced Customer Experience:** Customers are directly moved to the appropriate department without having to hang up and call back, reducing friction and frustration.
- **Optimized Queue Management:** It helps maintain the integrity of queue types by allowing agents to fix routing errors caused by the customer's initial selection.

6.1.6. Call Transfer - Agent(Warm/Cold)

Overview

Call Transfer allows an agent to move a live call to another agent, supervisor, queue, or an external number. The system supports two primary types:

- **Cold Transfer (Blind Transfer):** The call is transferred immediately without the agent speaking to the receiving party first.
- **Warm Transfer (Consultative Transfer):** The agent first speaks with the receiving party to provide context before connecting the customer.

How It Works

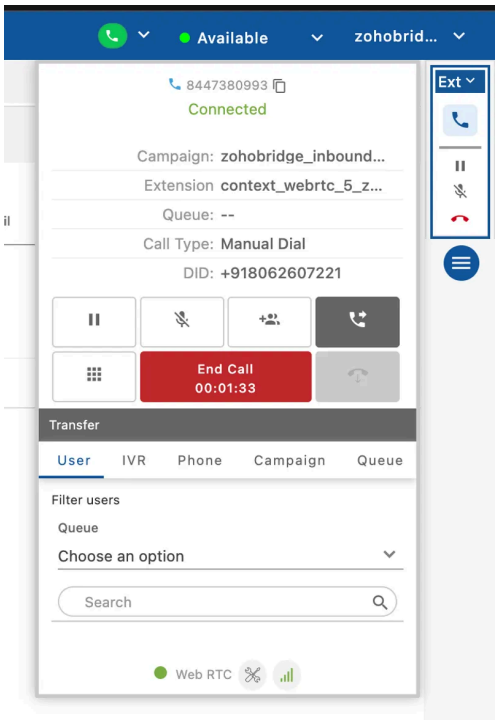
During a live call, an agent initiates a transfer from their console. For a Cold Transfer, the agent selects the destination and completes the action. For a Warm Transfer, the agent first 'Consults' with the destination party while the customer is on hold, briefs them, and then connects the customer.

Prerequisites

- The agent must be on a live call.
- The intended recipient (agent, queue) must be available.

Steps

- **Performing a Transfer (Agent):** This is a standard feature on the agent's call control panel.
  - **Location:** Agent > Agent Console > Call Control Panel
  - **Action:**
    1. During a call, click the **Transfer** button.
    2. A pop-up will appear to select the destination.
    3. For a Warm Transfer, first click **Confer**. For a Cold Transfer, click **Transfer** directly.



Use Cases

- **Cold Transfer:** A receptionist receives a call for the sales department and performs a cold transfer directly to the main sales queue.
- **Warm Transfer:** A Tier 1 support agent encounters a complex issue and initiates a warm transfer to a Tier 2 specialist after explaining the problem.

Benefits

- **Improved First-Contact Resolution:** Ensures calls are directed to the person or department best equipped to handle the issue.
- **Enhanced Customer Experience:** A warm transfer provides a seamless handover, preventing the customer from having to repeat their issue
- **Increased Efficiency:** Quickly routes calls within the organization, reducing handle time.

6.1.7. VoiceMail

Overview

The Voicemail feature allows callers to leave a recorded message when agents are unavailable (e.g., outside of business hours or when all agents are busy). Supervisors can later access these messages and respond, ensuring no customer inquiry is lost.

How It Works

When a call is routed to a voicemail node in the call flow, the caller hears a prompt and can leave a message. The system saves the recording as a .wav file. Supervisors access these voicemails through the Voicelogs tab in their console, where they can play, download, or delete the messages.

Prerequisites

- A routing nodeflow must be configured by an administrator to include a voicemail path.
- Audio prompts for instructing callers must be uploaded.

Configuration Steps

- **Voicemail Access (Supervisor):** This is a built-in feature and does not require configuration to access.
    - **Location:** Supervisor > VoiceMail
    - **Action:** Navigate to the VoiceMail tab. Use the search filters to find specific voicemails and use the Play, Download, and Delete icons to manage them.

Use Cases

- **After-Hours Support:** A customer calls a business after closing time and is automatically directed to leave a voicemail for a callback.
- **Queue Overflow:** During unexpected peak call volumes, callers can be offered the option to leave a voicemail.

Benefits

- **Capture All Customer Inquiries:** Ensures that every customer has an opportunity to leave a message, preventing lead loss.
- **Improved Customer Satisfaction:** Gives customers an alternative to abandoning a call, showing that their inquiry is valued.
- **Operational Flexibility:** Allows businesses to manage customer service outside of standard operating hours.

6.2. Call & Task Management

6.2.1. Phone Number Masking (Masked Calling)

6.2.2. ACW - After Call Work

6.2.3. Call Whisper

6.2.4. Call Barge

6.2.5. Callback

6.2.6. Warm Transfer to Queue/ Agent (Confer)

6.2.7. Wrap Up Time

6.2.8. Manual Call

7. System and User Management

7.3. License Management — Multi-CC Manager portal

Overview

License Management in the **Multi-CC Manager** portal is where a **central platform administrator** reviews the **global license pool** purchased for the deployment and **allocates** (splits) that entitlement across **contact centers** (environments) such as DefaultCC, Setup, Demo, CC1, CC2, and so on.

This guide is for people who sign in with **Multi-CC Manager** credentials. Typical entry and deep links use your deployment host and port, for example:

- **Multi-CC Manager app:** `https://<host>:<port>/app/`
- **License Management tab:** `https://<host>:<port>/app/#customTab1`

Replace `<host>` and `<port>` with production values. Sample URLs are illustrative only.

How It Works

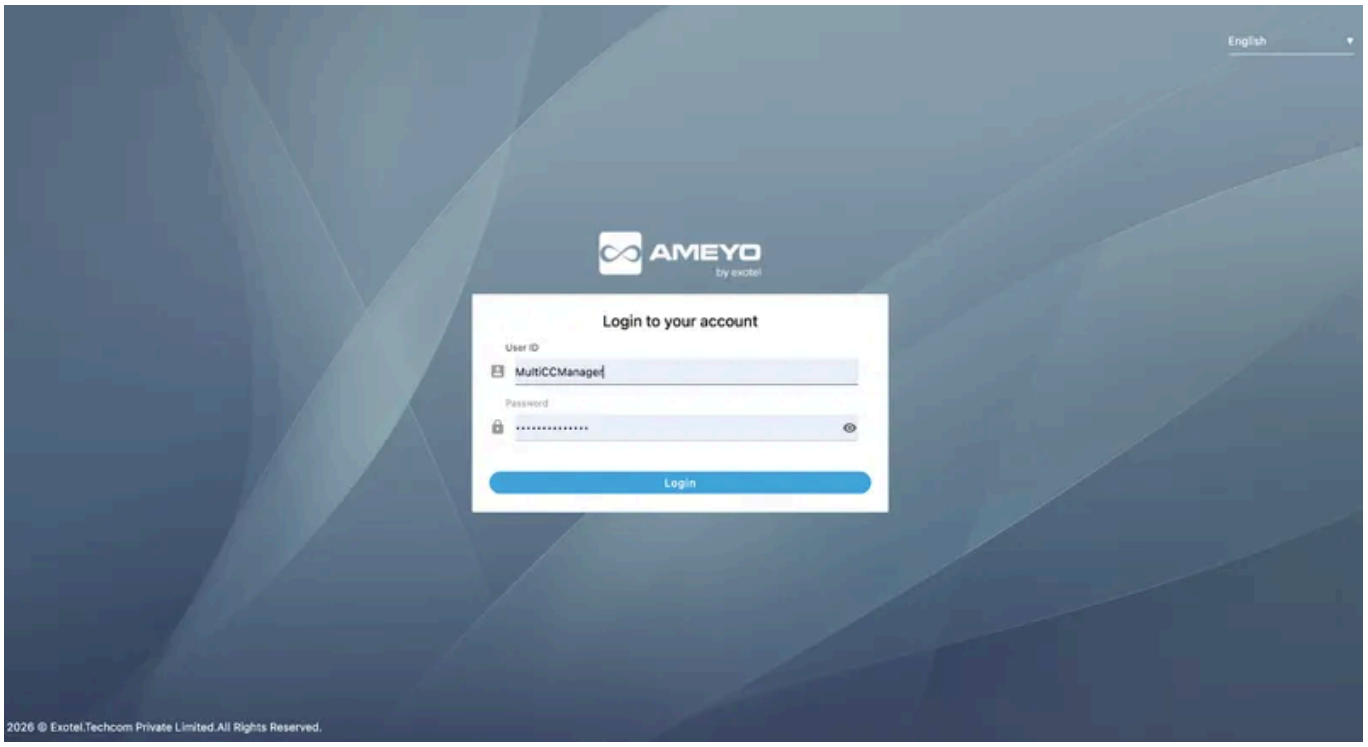
What you are managing

- Each **row** is one license item (feature toggle, numeric quota, or role-related cap).
- **Available license** is the **global** entitlement for that row (what the contract allows for the whole system).
- **Environment columns** are **per contact center**: what you assign to each CC from that global pool.

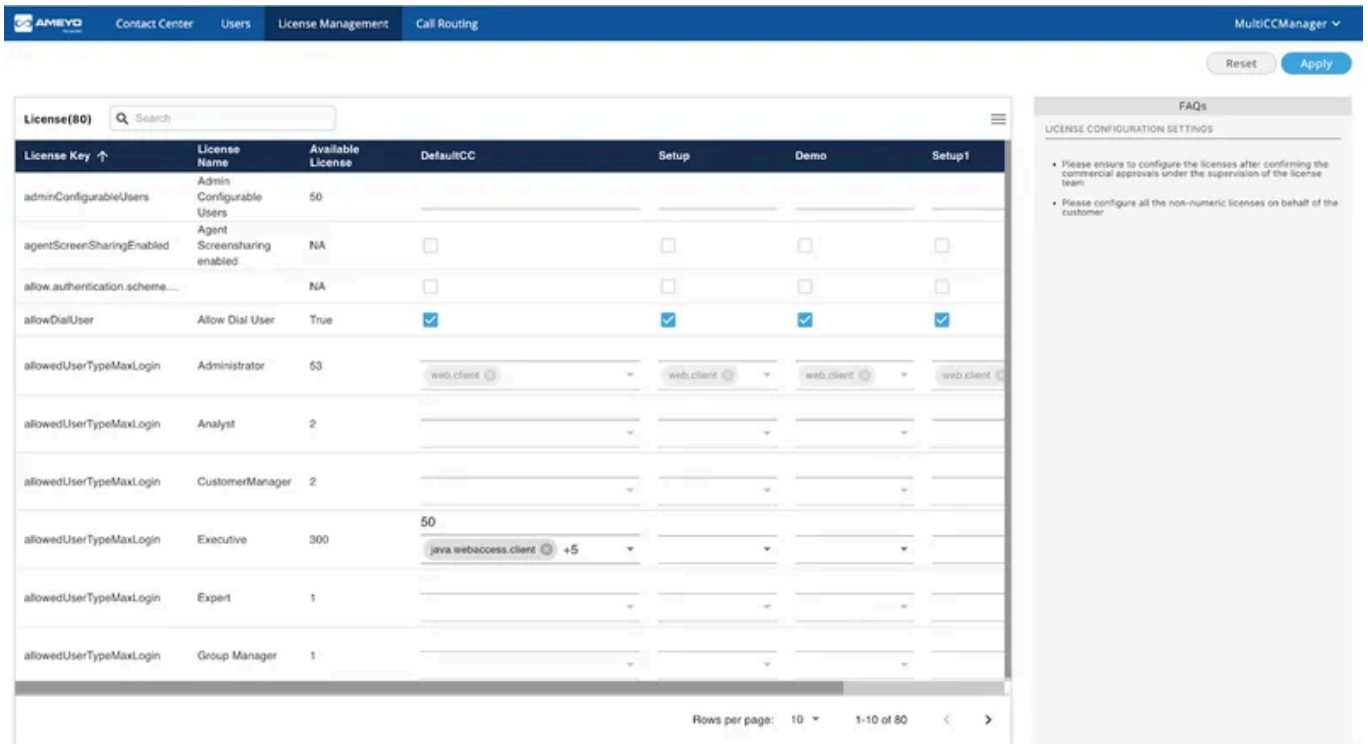
> Think of it as **one global budget** and **many child contact centers**: each CC receives a slice only where the product allows that license to be **multi-tenant** (splittable).

Multi-CC Manager — open the app and License Management

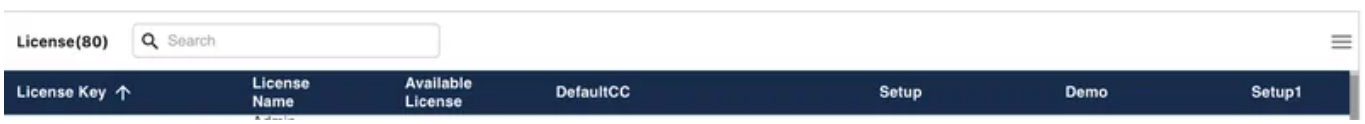
1. Log in to the Multi-CC Manager web app (for example at `/app/` on your host).



2. In the top bar, open **License Management** (the product label is **License Management**).

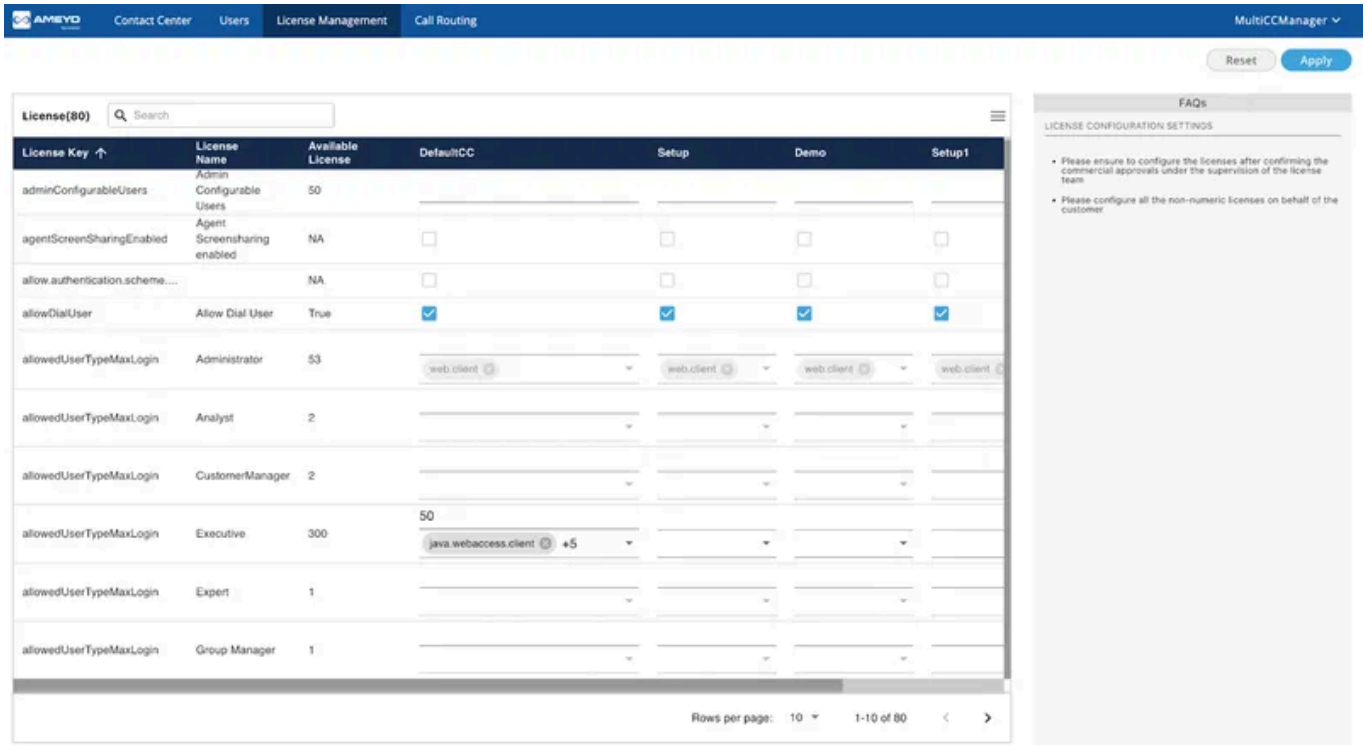


Read the license grid



Area	Meaning
License key	Internal name (for example `adminConfigurableUsers`, `allowDialUser`). Support and engineering use this in logs and configuration.
License name	Friendly label (for example “Admin Configurable Users”, “Allow Dial User”).
Available license	Global limit or status for the deployment: a number, **True** / **False**, or **NA**, depending on license type.
Environment columns (DefaultCC, Setup, Demo, CC1, CC2, …)	What you allocate to **that** contact center for the row.

Types of rows you will see



- **On/off (boolean) licenses: Available** may show as True, False, or NA. Environment cells are often **checkboxes**: checked means the feature is **on** for that CC, unchecked means **off**. Example: `allowDialUser` – “Allow Dial User” with checkboxes per environment.
- **Numeric / quota licenses: Available** is the **total cap** for the whole deployment (for example 50 admin-configurable users, 300 Executive logins). You type **numbers per environment**; each CC **consumes** part of the pool. For many numeric multi-tenant

items, the **sum across all CCs must not exceed Available**; otherwise save/update should **fail validation** (numeric sum / license validation error).

- **Role-based login limits** (`allowedUserTypeMaxLogin`): one row per role (Administrator, Analyst, Customer Manager, Executive, …). **Available** is typically a **global maximum** for that role (exact enforcement follows product rules). Cells may combine **numbers** with **client or channel tags** (for example `java.webaccess.client`) so limits can differ by how users connect (web access versus other clients). Tags and indicators such as “+5” in the UI represent **per-client-type** slices inside that CC.

After you save

Runtime license checks in each contact center use the **values you set for that CC**. Changes can affect logins, user creation, and feature visibility **immediately** after a successful save.

Prerequisites

- **Persona: Multi-CC Manager** (central / platform administrator) access—not the normal single-CC Administrator login path for day-to-day CC admins.
- **Process:** Use **change control**: record old versus new allocations per CC before large edits.
- **Safety:** Prefer validating changes on **non-production** contact centers first when your organization allows it.
- **Master contract:** Increasing **Available** totals usually requires **vendor or deployment** steps (new or updated license material); this screen **distributes** entitlement—it does not by itself increase the purchased global pool.

Configuration Steps

1. **Location:** Multi-CC Manager web app → sign in (example path `/app/`).
    - **Action:** Confirm you are in the correct **Multi-CC Manager** session for the deployment you intend to change.
2. **Location:** Top navigation → **License Management**.
    - **Action:** Open the License Management view (example hash route `#customTab1` on some builds).
3. **Location:** License grid → column **Available license** for the row you care about.

- **Action:** Treat **Available** as the **ceiling** for pooled numeric keys; do not plan allocations above it without a master-license change.

4. **Location:** Environment columns (DefaultCC, Demo, etc.).
    - **Action:** For **boolean** rows, set checkboxes per CC. For **numeric** rows, enter each CC's share; if the UI exposes **client/channel** tags, adjust those when your license model requires per-client splits.
5. **Location:** Save / Apply control for the screen (wording depends on build).
    - **Action:** Submit changes. If validation fails (for example sum over **Available**), reduce one or more CC columns or adjust the master license, then retry.
6. **Location:** Search box and pagination (for example title **License (80)** meaning 80 rows).
    - **Action:** Use **search** to find a **license key** or **license name**; use **rows per page** and next/previous to move through long lists.

Configuration parameters

License rows are identified by **license keys** (machine names). Values you set per **environment** column are stored as **per–contact-center license allocation** in the product backend; exact persistence names are not part of this user guide. Use the table for **operational mapping** (UI ↔ meaning ↔ examples).

Key / parameter	Description	How to configure	Constraints & options	Sample
License key (row identifier, e.g. `adminConfigurableUsers`)	Stable internal name for the license row; used in support and logs.	Rows are defined by the **deployed license**—you do not create keys in this UI.	One row per licensed item the product exposes.	`adminConfigurableUsers`
License name (display label)	Human-readable title for the row.	Display only; search matches this text in many builds.	Shown next to or instead of raw key in UI.	Admin Configurable Users
Available license	**Global** entitlement for that row for the whole deployment.	Set from **master license / deployment**, not by typing into this column as an arbitrary cap.	Numeric, Boolean, or **NA** by license type.	`50` (users)
Environment allocation (per CC column)	What that contact center may consume for the row.	**Multi-CC Manager** → **License Management** → edit the cell for the target **CC** column.	For pooled numerics: **sum of CC cells ≤ Available** where the product enforces pooling; booleans: on/off per CC.	`20` in DefaultCC, `10` in Demo
`allowDialUser` (example boolean key)	Whether **dial user** capability is allowed, expressed per CC.	Toggle the **checkbox** in that CC's column for the row labeled for this key / name.	Checked = enabled for that CC; unchecked = disabled.	Enabled on DefaultCC, disabled on Demo
`allowedUserTypeMaxLogin`	Caps logins **per role**, sometimes	Enter numbers (and adjust client tags if shown) in	Must respect **Available** and product	Executive + `java.webac`

Key / parameter	Description	How to configure	Constraints & options	Sample
(example role-grid key)	with **client/channel** dimensions.	the cells for each CC.	rules for that role and client type.	`cess.client` slice

> If **Available** is too low for the totals you need across CCs, you need a **license / deployment** change to raise the global entitlement—editing only the grid cannot invent new **Available** capacity.

Use Cases

- **Balance production and demo:** Keep **Demo** small numeric allocations so **DefaultCC** retains most of a shared user or login pool.
- **Disable a feature for one CC:** Use a **boolean** row to turn a capability **off** for a specific contact center while leaving it **on** elsewhere.
- **Role and channel fairness:** Use **allowedUserTypeMaxLogin**-style rows to cap Executive (or other role) usage separately for **web access** versus other clients where the UI exposes those dimensions.

Benefits

- **Single pane** for **global entitlement** and **per-CC allocation** where multi-tenant splitting is supported.
- **Per-CC feature toggles** for many boolean licenses without opening each CC's Administrator workbench for every flag.
- **Validation** on save helps prevent **over-allocation** against the purchased pool for pooled numeric items.
- **Search and pagination** make large license tables easier to navigate.

Limitations

- **Misallocation risk:** Raising one CC without lowering others can hit **sum** validation or **starve** another CC.
- **Technical keys:** Operators need training to map **License name** ↔ operational impact (for example `adminConfigurableUsers` caps admin-created users in that CC).
- **Wide grids:** Many environment columns and many rows increase the chance of **missing** a critical row; pagination requires discipline.
- **Immediate effect:** After save, users in a CC can see **blocked logins**, **failed user creation**, or **disabled features**—treat production edits as high risk.
- **Not every key is splittable:** Only licenses the product treats as **multi-tenant** can be managed this way; others may not accept per-CC splits.

Related Topics

Term	Meaning
Contact Center (CC) / Environment	A tenant slice (for example DefaultCC, Demo) with its own users and configuration.
Available license	Global entitlement derived from the system license for that row.
Allocation	The number or checkbox state you set in a **CC** column.
Multi-tenant license	A license the product allows to split per CC; validated in the backend.

7.4. Admin Config & Features

7.4.1. Number Masking

Number Masking allows organizations to make customer phone numbers confidential, hiding them from agents and other users. This feature ensures compliance with IT regulatory standards and industry requirements regarding consumer data privacy. When enabled, identifiable information like phone numbers is anonymized or masked, preventing unauthorized recognition or use beyond the intended purpose.

Note: Number Masking is available for Voice only and does not apply to Fusion.
Applicability: This feature is designed for use within the Unified Agent Desktop (UAD) or /app where Ameyo serves as the primary interface. It is also available in the Mobile app / webToolbar; however, in this context, the masking applies only at the visual interface layer. The underlying contact number remains accessible through system-level logs and developer tools.

Key Capabilities

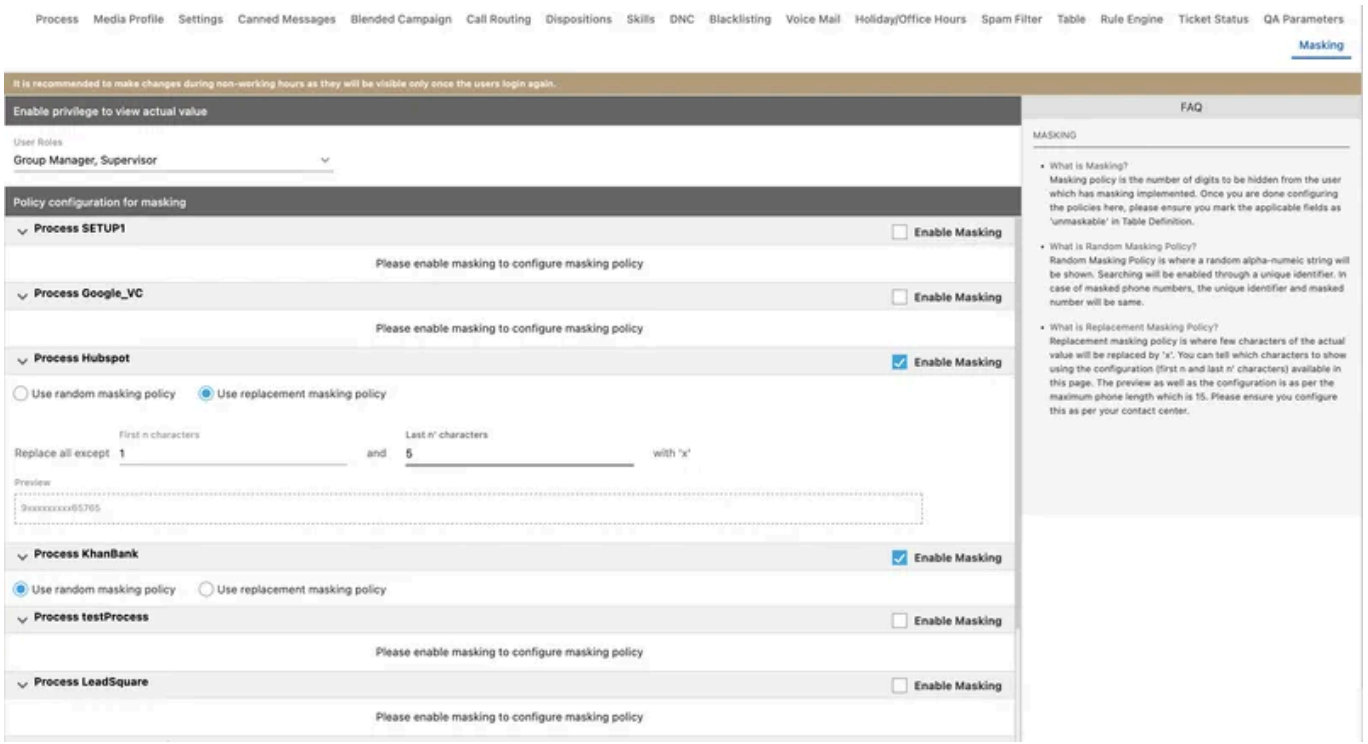
- **Role-Based Visibility:** Administrators can grant specific user roles the privilege to view unmasked (actual) numbers for verification purposes.
- **Process-Level Configuration:** Masking can be enabled or disabled for specific processes. If enabled for a process, it applies to all campaigns within that process.

- **Masking Policies:** Choose between random alphanumeric strings or partial character replacement.

Configuration

Accessing the Masking Tab

1. Log in to the **Administrator Console**.
2. Navigate to **System Configuration**.
3. Click on the **Masking** tab.



Enabling Unmasked View for Specific Roles

In certain scenarios, roles such as Supervisors or Analysts may need to verify actual phone numbers. To grant this privilege:

1. In the **Masking** tab, locate the "Enable Privilege to view the Actual number for the User Roles" section.
2. Select one or more of the following roles to allow them to view unmasked values:
    - Analyst
    - Executive
    - Group Manager

- Professional Agent
- Supervisor

```
Caution: It is recommended to use this option cautiously to maintain data security.
```

Configuring Masking Policies

Once masking is enabled for a process, you must select a masking policy:

1. Random Masking Policy

- **Description:** Replaces the phone number with a random alphanumeric string.
- **Searching:** Searching is enabled through a unique identifier. In this policy, the unique identifier and the masked number are the same.

2. Replacement Masking Policy

- **Description:** Replaces specific characters of the actual number with 'x'.
- **Configuration:** You define how many characters to show at the start (n) and at the end (n') of the number. The remaining characters in the middle are masked.
- **Constraint:** The preview and configuration are based on a maximum phone length of 15 digits. The sum of the first characters (n) and last characters (n') must not exceed 15. If the total exceeds 15, an inline error is displayed.

Applying Changes

1. After configuring the policy and roles, click **Apply**.
2. **Important:**
    - Changes such as enabling, disabling, or modifying policies will only be visible to users after they log out and log in again to the Ameyo Application Server.
    - It is recommended to make changes during non-working hours to avoid impacting business operations.
    - Once phone numbers are masked using a Masking Policy, they cannot be unmasked.

Voice Log Filename Masking

When number masking is enabled, voice log filenames on the call server are also masked by default. Starting from version 4.13.26, the `unmaskRawVoiceLogs` system configuration flag can be set to `true` to store voice log files with the real (unmasked) filename on the call server, while the UI continues to show masked values. This is useful for integrations that match recordings by phone number.

UI Masking Consistency

Starting from version 4.13.33, number masking behaviour is **aligned across all UI surfaces** – including the Agent Toolbar and Supervisor console – so that masked numbers appear consistently regardless of where they are viewed.

Privilege Management Enhancements

Starting from version 4.13.48, administrators have expanded control over masking-related privileges, allowing more granular assignment of who can view unmasked data across different user roles and contexts.

Version History

Version	Enhancement	Release Notes
4.13.26	Configurable voice-log filename masking via `unmaskRawVoiceLogs` flag	**4.13.26**
4.13.33	UI masking alignment across Agent Toolbar and Supervisor console	**Contact Center - Patch Release Notes - Version 4.13.33**
4.13.48	Expanded mask-related privilege management	**Contact Center - Patch Release Notes - Version 4.13.48**

7.4.2. VoiceMail

Overview

Voicemail is a feature that stores **Voice Messages** left by **Customers** when their call is **not connected to an agent** for any reason. This feature is **licensable** and can be configured at both the **Campaign-level** , **Queue-level** and **User-level**.

How it works (Administrator Configuration)

The Administrator manages the global recording and notification settings for voicemails.

System-Level Configuration

The Voicemail tab in the **System Configuration** menu controls global settings.



- **Voicemail Toggle**: Must be **enabled** by sliding the bar to the right for voicemails to be recorded across the system.
- **Notification Email IDs**: Check this box and enter multiple **Gmail domain** email addresses (separated by commas) to receive voicemail notifications.
- **Welcome Voicemail Prompt**: Select the prompt that plays at the start of the voicemail recording.
- **Finish Voicemail Prompt**: Select the prompt that plays at the end of the voicemail recording.

How it works (Supervisor Persona)

The Supervisor is the primary user who can fetch, listen to, and manage voicemails.

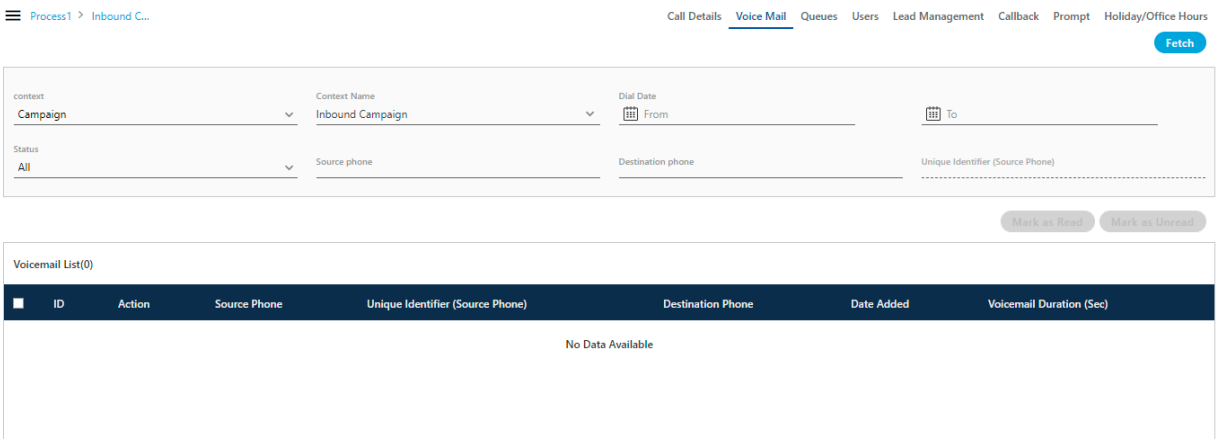


Figure: Voicemail

Access and Filtering

1. Navigate to the **Manage** tab for an **Inbound Campaign**.
2. Select the **Voicemail** tab.
3. **Fetch Voicemails** by selecting a filter **Context** from the dropdown:
    - **User**: Fetches voicemails related to a **selected user** assigned to the campaign.

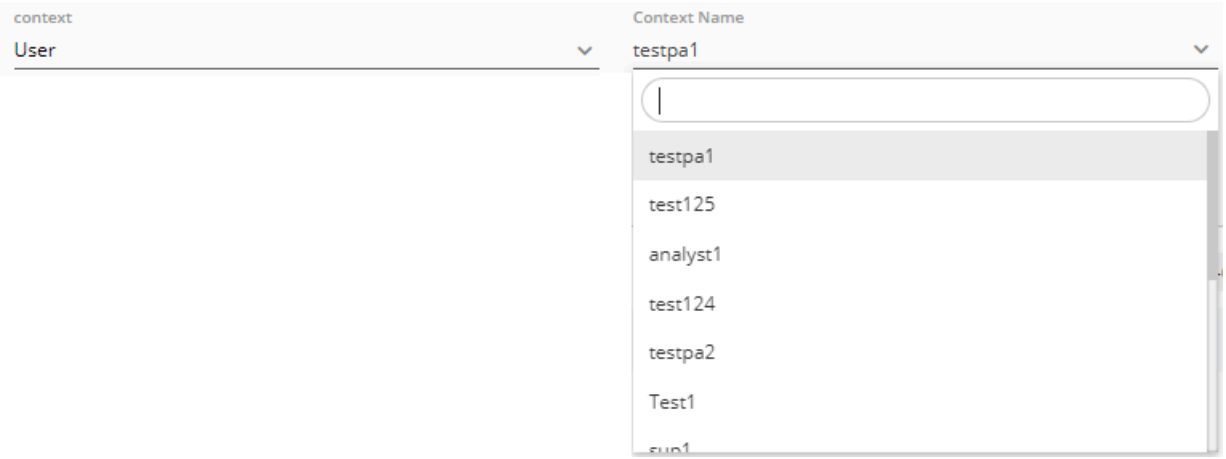


Figure: Select User

    - **Queue**: Fetches voicemails for a **selected queue** within the campaign.

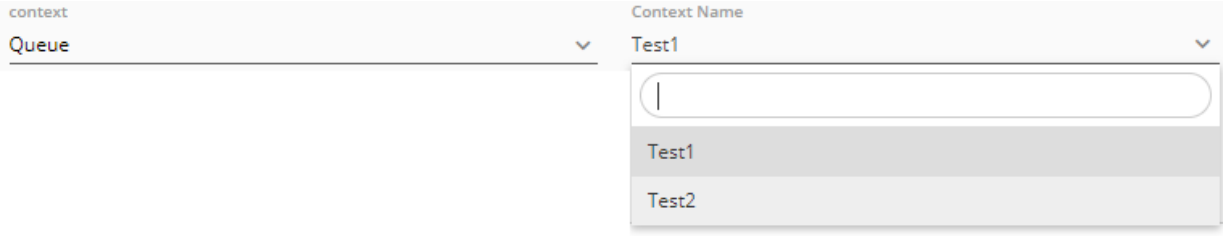


Figure: Select Queue

    - **Campaign**: Fetches voicemails for the **current campaign**.

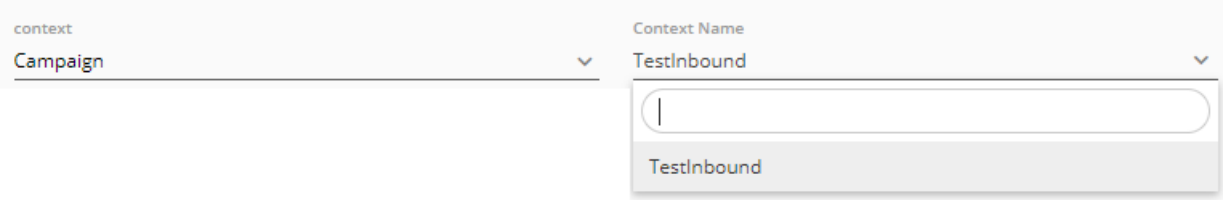


Figure: Selected Campaign

4. Select the **Status** to fetch: **All**, **Read**, or **Unread** voicemails.

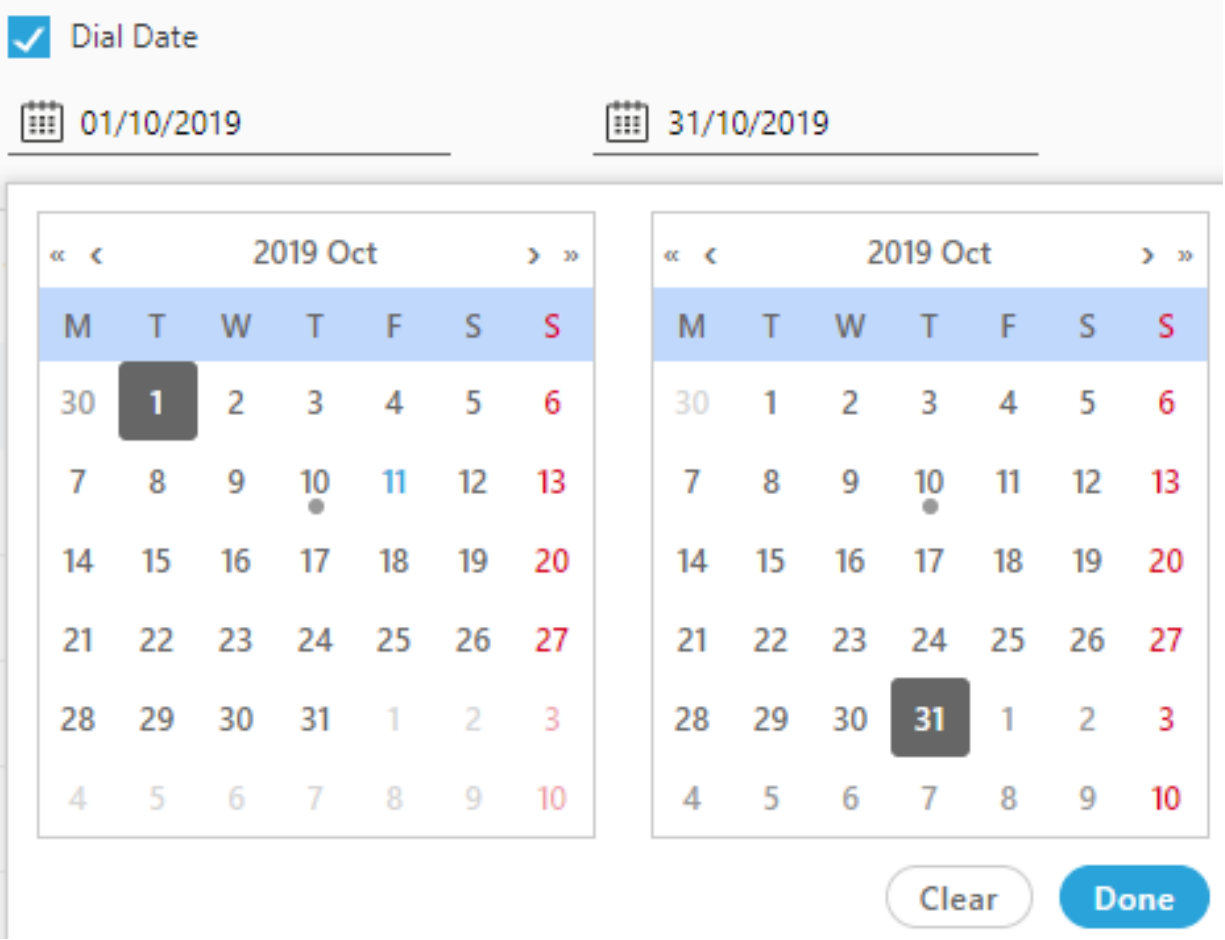


Figure: Select "From" and "To" Dates

5. Optionally, filter by **Dial Date**, **Source Phone** number, or **Destination Phone** number.

6. Click **Fetch** to retrieve the list of voicemails.

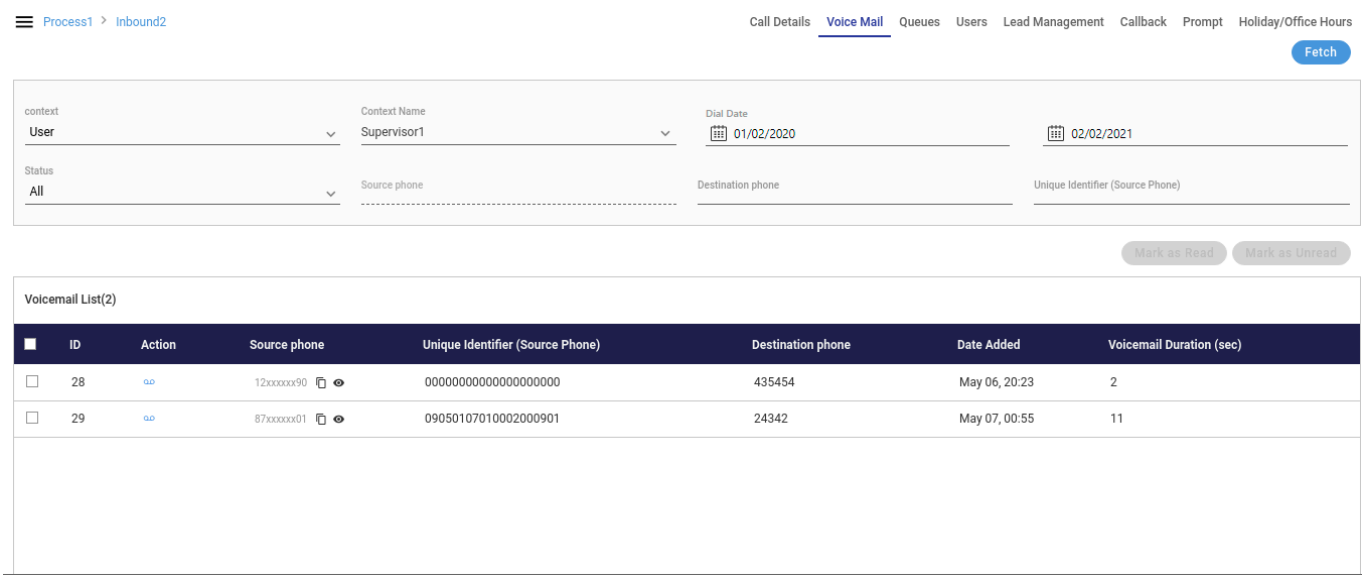


Figure: Fetched List of Voicemails

Voicemail Operations

The fetched list contains columns for **ID**, **Action**, **Source Phone**, **Destination Phone**, **Voicemail Duration**, and **Date Added**.

Operation	Action
Listen	Click the listen icon (D) in the **Action** column.
Download	Click the **download button** within the listen pop-up.
Mark as Read	Select a voicemail and click the **Mark as Read** button.
Mark as Unread	Select a voicemail and click the **Mark as Unread** button.
Delete	Select a voicemail and click the **Delete** button. A confirmation is required, and deleted voicemails cannot be retrieved.

Queue-Level Configuration

In the **Queue Management** settings of an **Inbound Campaign**, the Administrator can configure voicemail for individual queues.

- **Voicemail Toggle**: An individual toggle switch allows the Administrator to enable or disable voicemail recording for that specific queue.
- **Notification Email IDs**: The Administrator can check a box to send voicemail notifications to the specified email IDs.
- **Welcome/Finish Prompts**: Specific welcome and finish prompts can be selected for this queue.

Prerequisites

- The **Voicemail License** must be **procured** for the contact center.
- The feature must be **enabled** by the Administrator at the System-level.
- The feature must be **configured** and **enabled** at the target **Queue-level** within the Inbound Campaign settings.
- The appropriate **Welcome** and **Finish** prompts must be uploaded and selected.

Benefits

- **Reduced Missed Opportunities**: Ensures that messages from customers who could not connect with an agent are captured, preserving leads or critical inquiries.
- **Supervisor Control**: Provides a dedicated interface for Supervisors to efficiently manage, listen to, and delete voicemails by user, queue, or campaign.
- **Notification and Alerting**: Notifications can be configured via email, ensuring key personnel are instantly alerted when a customer leaves a message.

Use Cases

- **Post-Hours Inquiry Capture**: A customer calls **after office hours** or during a **holiday** and is routed to voicemail, ensuring the message is recorded and can be addressed by an agent during the next shift.
- **Agent Unavailability**: All agents in the queue are **busy**, and the call exceeds the maximum waiting time. The system routes the call to voicemail to prevent a total call abandonment.
- **Quality Review**: A **Supervisor** uses the **Voicemail tab** and the **Listen** function to review messages for **training purposes** or to flag urgent customer issues for immediate follow-up.

7.4.3. VoiceLogs / VLA

Overview

The **Voicelogs** tab, or **Voicelogs Analysis (VLA)**, provides a centralized interface for authorized users to search, filter, listen to, and manage call recordings (voicelogs) and their associated metadata. This feature is crucial for **Quality Assurance (QA)**, monitoring agent performance, and ensuring regulatory compliance by providing robust tools for scoring, downloading, and amplifying call audio.

Key Benefits

- **Quality Monitoring:** Allows **Supervisors** and **Quality Analysts** to directly listen to the agent's conversation with the customer without having to download the recording first, supporting immediate feedback.
- **Data Filtration:** Enables searching and fetching call recordings based on a wide array of criteria, including date/time, campaign, disposition codes, user, and call duration, facilitating targeted QA sampling.
- **Audio Enhancement:** Provides options to amplify the customer's or agent's voice via **Input Gain** and **Output Gain** to resolve cases where the volume is low or hard to hear.
- **Batch Management:** Supports the downloading of all or selected voicelogs in default or MP3 format.

Functionality & Capabilities

The Voicelogs feature is accessed through the Voicelogs tab and offers comprehensive tools for call management:

Voicelog List Page (Real-Time & Analysis)

This page is displayed after selecting a filter and clicking the **"List" Button**. It serves as the primary analysis workspace.

- **Direct Listening & Playback:** Users can click the icon next to the phone number or agent name to **Listen** to the conversation directly using a floating player pop-up, which includes standard controls like play, pause, and scrub.

- **Audio Customization:** The floating player offers advanced settings:
  - **Output Gain:** An amplification parameter (1-10 settings) specifically for the **customer's voice**.
  - **Input Gain:** An amplification parameter (1-10 settings) specifically for the **agent's voice**.
  - **Input Mute:** Allows the user to mute the agent's voice.
  - **Output Mute:** Allows the user to mute the customer's voice.
- **Scoring and Verification:** Users can provide **remarks and scores** on voicelogs as part of a QA process. They can also view the current **verification status** of the voicelog (whether it has been verified or not).
- **Detailed Search Filters:** Users must first check the **"Date/Time Range"** box and provide **"Start Date and Time"** and **"End Date and Time."** Additional filters include:
  - **Campaign Filter:** Only one campaign can be selected at a time.
  - **User Disposition Filter:** Filters based on the disposition code provided by the agents (e.g., "Sale Closed").
  - **System Disposition Filter:** Filters based on system-generated outcomes (e.g., "Connected," "Failed").
  - **Users Filter** and **Queue Filter**.
  - **Call Metadata Filters:** Filters based on **Phone Number**, **Filename**, **Call ID**, and **CRT Object ID** (Customer Relationship Tracker ID).
  - **Duration Filters:** Allows filtering for calls greater than or less than a specified duration in seconds.

Voicelogs Download Page (Batch Management)

This page is accessed by clicking the **"Proceed Button"** after filtering.

- **Batch Download:** Users can download all filtered voicelogs in **default or MP3 formats**.
- **Batch Deletion:** The page can also be used to **delete** filtered voicelogs in bulk, allowing for data storage management.

Usage by Personas

Administrator/Voice-Admin (System Configuration)

- **Recording Controls:** Responsible for setting up recording rules, including enabling voicelog recordings at the campaign level within **General Settings**.
- **Voicelog File Format:** Sets the **File Format** (e.g., alaw, ulaw, gsm, g729) for saving call recordings.
- **Compliance:** Configures **"Play Periodic Beep"** to notify the caller that the call is being recorded, specifying the **interval in seconds** for the beep sound, which is essential for compliance.

Supervisor & Analyst (Monitoring/QA)

- **Primary Users:** These roles are the primary consumers of the VLA tab for quality management and performance auditing.
- **Remote Monitoring:** They use the **direct listening** and **audio amplification** features to perform remote call monitoring and coaching.
- **Reporting:** They leverage voicelog data as a source for critical reports like the **Call History Report** and **Call Details Report** for deeper analysis of call outcomes.

Agent (Self-Service)

- **Call History Access:** The **Agent** can access the **Call History** tab within their own console to view details of their calls.
- **Self-Monitoring:** They have the ability to **listen to** and **download** the voice recording of a call from their personal Call History tab, provided the Administrator has not restricted the option to listen to self-campaign voicelogs.
- **Limited View:** Agents do not have access to the broad filtering and batch processing capabilities available to supervisors.

7.4.4. Local IVR

Overview

A "Local IVR" is a full-fledged Interactive Voice Response (IVR) system that runs locally within a campaign's context. While a standard IVR typically handles incoming customer calls before they reach an agent, a Local IVR is often used *during* an active call.

Agents can conference a customer into a Local IVR to automate specific processes, capture sensitive data, or collect post-call feedback without disconnecting the line.

> Interactive Voice Response (IVR) is an automated system that allows customers to interact with a contact center using their telephone keypad (DTMF tones).
>
> **Note:** Local IVR is a **licensable feature.** Ensure you have procured the appropriate license to view and use this tab in your campaign settings.

Business Use Cases

- **Secure Data Collection (Automated Payments):** An agent conferences a customer into a secure Local IVR to enter credit card details or PINs. The information entered via DTMF tones is processed by the system and is **not visible to the agent**, ensuring PCI compliance and security.
- **Customer Verification:** Agents can route a caller to an IVR to verify their account number or identity before proceeding with a sensitive transaction.
- **Self-Service:** Providing customers with options to check account balances or track an order automatically.

How It Works

A call is directed to a pre-configured call flow (nodeflow). The IVR plays audio prompts (e.g., "Press 1 for Sales"), and the customer's key press determines the next step, such as transferring to a queue or another IVR menu. Agents can also conference a customer into a Local IVR for assisted processes.

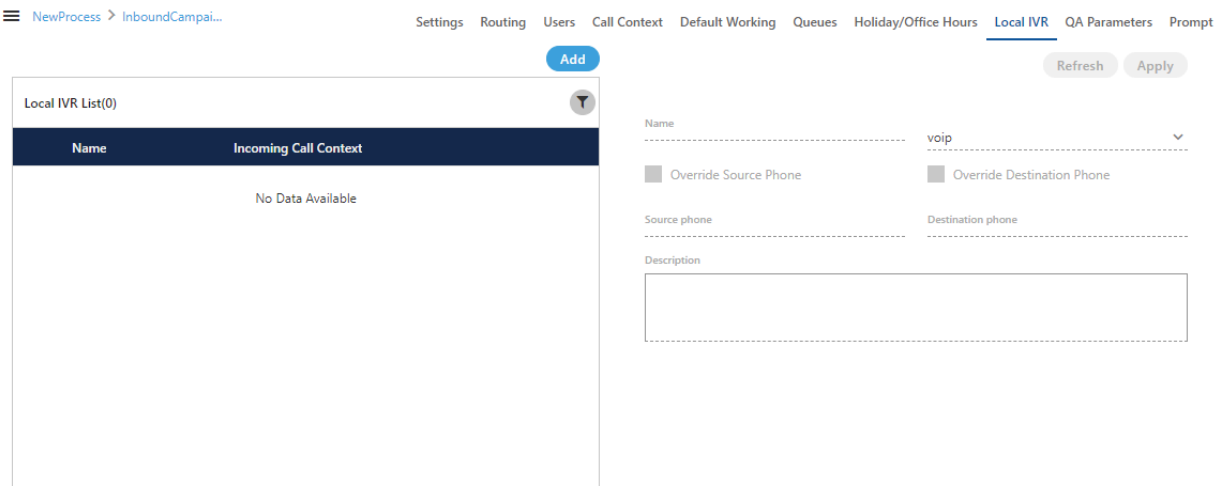
Prerequisites

- **Licensing:** This is a **Licensed Feature** and requires the appropriate license component to be procured and visible in the campaign settings.
- **Campaign Assignment:** Must be configured within the **Interactive Voice Application Campaign Settings** (Inbound Campaign).
- **Call Context:** The Local IVR must be associated with a **Call Context** that has been assigned to the campaign.
- **Nodeflow:** A nodeflow must be designed by Professional Services team as per the business requirement.

Configuration Steps

Administrator/Voice-Admin Configuration

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



Add a Local IVR

Perform the following steps to add a Local IVR.

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

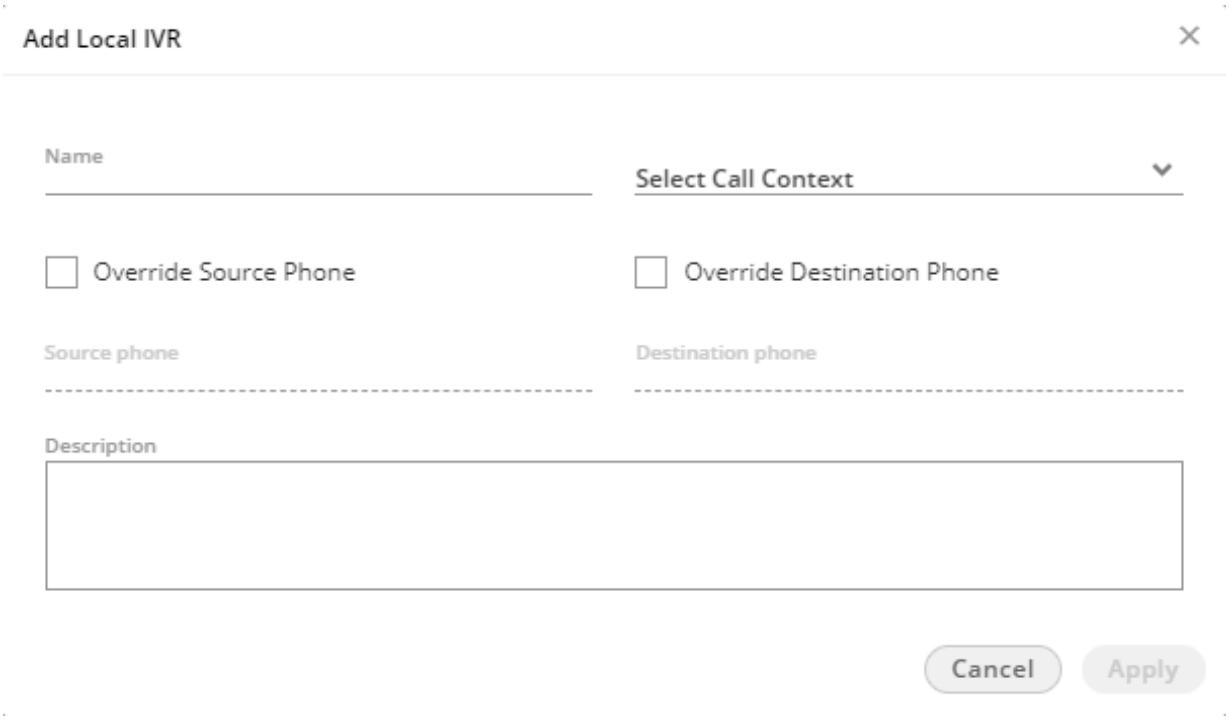


Figure: Add a Local IVR

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

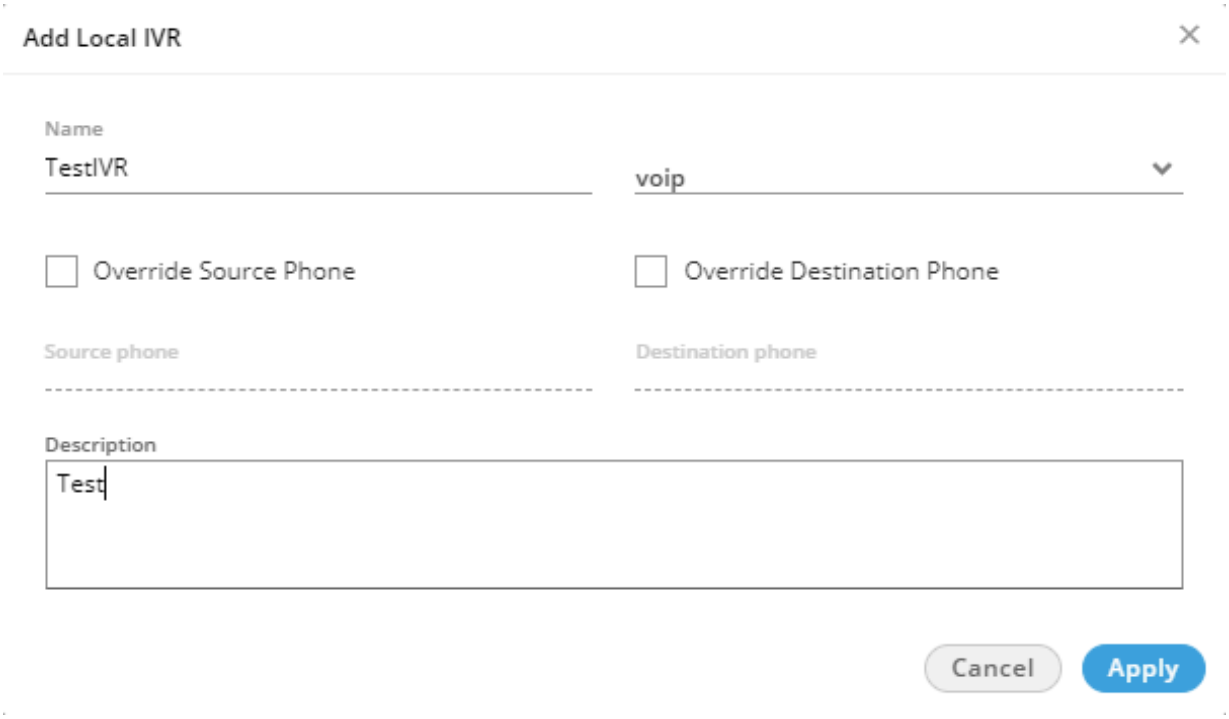


Figure: Sample Details

7. Click "Apply" to create the local IVR using the selected call context.
   Rather you can click "Cancel" to not create it

You can follow these steps to create multiple Local IVRs.

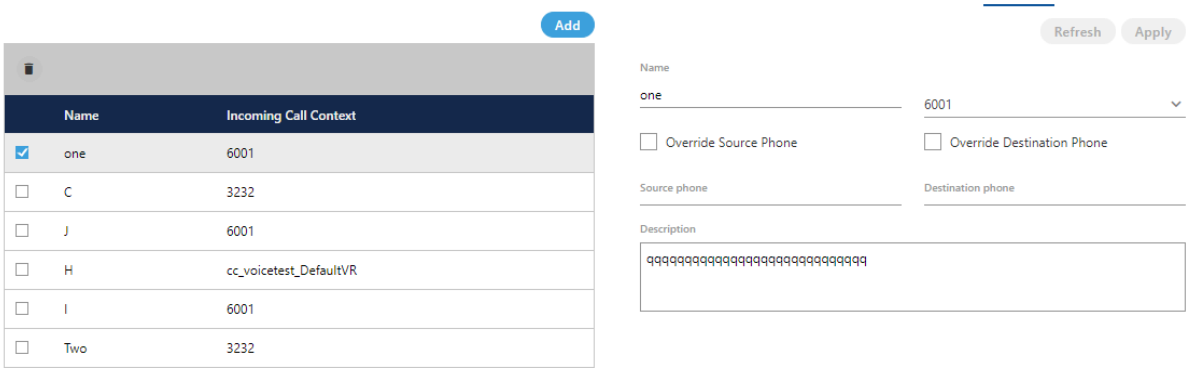


Figure: Local IVRs

Modifying an IVR

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

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

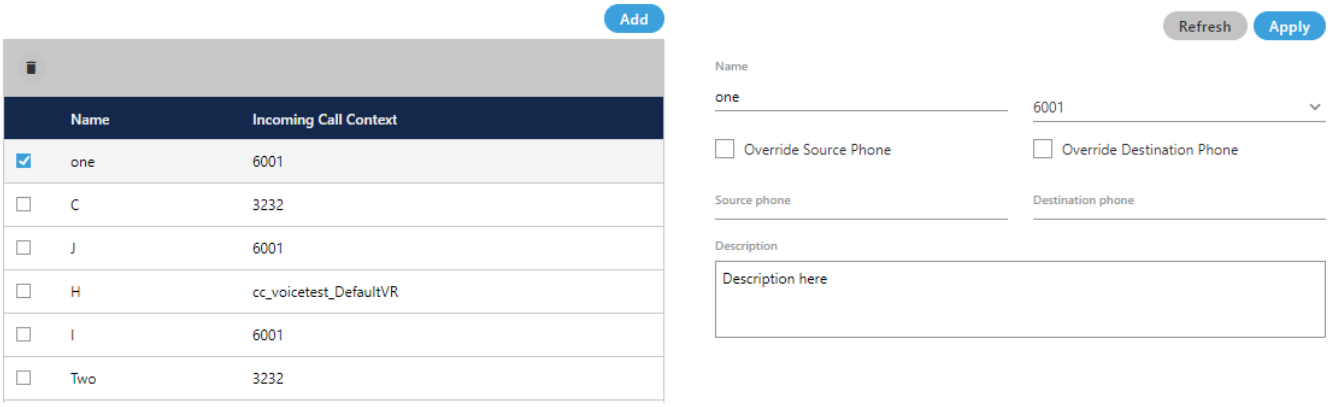


Figure: Sample Details

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

- Name
- Call Context
- Enable or disable the option to override the Source Phone
- Already provided Source Phone Number
- Enable or disable the option to override the Destination Phone
- Already provided Destination Phone Number
- Description

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

3. Validate the changes carefully as the Call Routing can be disabled for this Local IVR if any change is made to Call Context, Source Phone, or Destination Phone.
4. Click "Apply" to apply the changes.Rather, you can click "Cancel" to discard the changes.

Delete an existing Local IVR

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

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

Perform the following steps to delete a Local IVR.

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

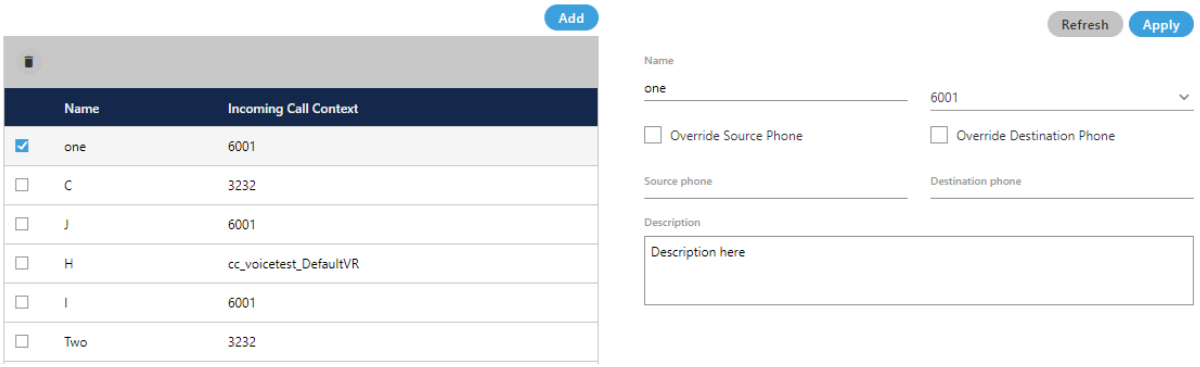


Figure: Sample Details

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



Figure: Warning before deleting an IVR

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

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

Scenario 1: System-level Call Routing for IVR

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

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

Refer to "**System Call Routing**" page to know about the steps to create a Call Routing Plan.

Scenario 2: Campaign-level Call Routing for IVR

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

Refer to "**Call Routing**" page to know the steps to create a Call Routing in the Campaign Settings.

How Call Routing works with Local IVR?

Call Routing means that a call is being moved from an endpoint to another. The decisions in the Call Routing can be made using many reasons sucha as Caller Identification, Dialed Number, Time of Day, and Custom Defined Parameters established in an IVR (Interactive Voice Response) program script.

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

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

Important Point

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

Benefits

- **Increased Operational Efficiency:** Automates routine inquiries, freeing up agents for more complex interactions.
- **Improved Customer Experience:** Empowers customers with self-service options and ensures they are quickly directed to the right department.
- **24/7 Availability:** Provides basic support and information to customers even outside of normal business hours.

Limitations

- Local IVR is not supported for Outbound Campaigns.
- Agents can only conference a customer with a Local IVR; they cannot perform a direct transfer to it.

7.4.5. Prompts Management

Overview

Prompts are voice messages (audio files) that are played to customers during call interactions, typically within Interactive Voice Response (IVR) systems or for features like Voicemail. Prompts are configured at the campaign level by Administrators or Supervisors.

Management and Configuration

Adding a Prompt

Supervisors and Administrators can upload voice message prompts to be used in a campaign.

- **File Details:** When adding a prompt, a name for the prompt and a file name for the sound file must be provided.
- **Storage:** A name for a folder where the sound file will be stored on the server must be specified.
- **Activation:** The **"Is Active"** checkbox is used to activate the new prompt for use as a Voice Prompt.

File Compatibility and Conversion

The system supports uploading prompts in MP3 and Wav format.

- **Supported Formats:**
  - **MP3:** cbr mp3, vbr mp3, 144kbps mp3, and 256kbps mp3.
  - **Wav:** PCM with any sampling rate (Hz) or bitrate.
  - **Size:** Files are limited to **up to 25 MB**.
- **Conversion:** The call server is configured to play only .wav files with **16-bit sample size, 8000 Hz, and mono-channel**. As soon as an audio file is uploaded, the system converts it to this compatible format. The file name provided during upload should be specified with the .wav extension.

Editing and Deleting Prompts

- **Editing:** When editing an existing prompt, the name, file name, or path (where it is stored) **cannot be changed**. Only the prompt file itself can be re-uploaded.
- **Deletion:** Prompts can be deleted, but once deleted, they **cannot be restored**.

Prompt Status and Identification

All prompts (uploaded by Administrator or Supervisor) have a visible **Status** column that indicates its current state:

Status	Definition	Visual Indicator
Used	The prompt is currently in use.	N/A
Unused	The prompt is not currently in use.	N/A
Missing	The prompt voice file is missing, but the prompt has been created.	A visual **red dot indentation** is present at the front of the prompt.

Export to Sheets

- **Non-editable Missing Prompts:** When trying to add a missing prompt, the name field is **non-editable**.
- **Notifications:** If a Supervisor uploads nodeflows to missing prompt files, a notification is sent to both the Administrator and Supervisor.

Usage Across the Product

Prompts are primarily used for voice-based campaigns:

- **IVR/Routing:** Prompts are integral to Interactive Voice Application Campaigns (Inbound) and Voice Blast Campaigns, often used in nodeflows to deliver pre-recorded messages or present options to the customer.
- **Voicemail:** Prompts are used to configure the Voicemail feature (a licensed feature):
    - **Welcome Voicemail Prompt:** Selected for the greeting message.

    - **Finish Voicemail Prompt:** Selected for the concluding message.
- **System Level:** The Administrator/Voice-Admin can manage Voicemail Prompts at the System Level.

Navigation

- **Administrator/Voice-Admin:**
    - **System-Wide Configuration (Defaults/Voicemail):** Navigate to System > System Configuration > Voice Mail (for Voicemail Prompts - licensed feature).
    - **Campaign-Level Configuration:** Navigate to Process > *Select Voice Campaign* > Prompt tab.
- **Supervisor:**
    - Navigate to Manage > *Select Inbound/Outbound Campaign* > Prompt Management tab.

7.4.6. Disposition Plan, Codes & Class

Dispositions are a core feature used to classify the outcome of customer interactions, primarily calls. The entire feature is managed through three components:

- **Disposition Code:** The specific reason an agent selects for call disconnection. Know **Standard Definition of Dispositions**
- **Disposition Class:** A set or logical grouping that contains multiple Disposition Codes. Know **Standard Definition of Dispositions**
- **Disposition Plan:** The final configuration that groups selected Disposition Codes, which is then assigned to a specific campaign to be used by agents. Know **Standard Definition of Dispositions**

Key Benefits

- **Structured Classification:** Allows for the classification of interaction outcomes into a logical, hierarchical structure (Classes and Codes).
- **Improved Efficiency:** Agents can select the appropriate disposition during the call wrap-up process (**After Call Work**), ensuring every interaction has a defined outcome.
- **Customization:** Administrators and Voice-Admins can create **User Defined** disposition classes and plans tailored to business requirements.
- **Reporting:** Disposition Codes and Classes are recorded and tracked in reports (e.g., Call History Report and Call Details Report).

Functionality

The system offers two modes for agent disposition selection:

- **Two-Level Disposition (Default from 4.13+):** The agent must first select the **Disposition Class**, and then select the corresponding **Disposition Code**. This two-level dropdown is the **default** structure starting from version 4.13.
- **One-Level Disposition:** All nested dispositions appear in a single flat list. The agent selects only the main disposition without a sub-disposition step. This mode is enabled via backend configuration.

Prerequisites

- **Administrative Access:** Configuration must be performed by the **Administrator** or **Voice-Admin** via the **Dispositions** tab in System Configuration.
- **Plan Assignment:** The created **Disposition Plan** must be selected within the relevant campaign settings (e.g., General Settings) for the codes to be visible to agents.
- **One-Level Enabling (If desired):** To switch from the default **Two-Level Disposition** to **One-Level Disposition**, specific backend database queries must be executed to disable the two-level setting.

Usage Instructions

The following steps outline the process for a **Administrator/Voice-Admin** to set up a Disposition Plan:

1. **Define Disposition Classes:**
    - Navigate to the **Dispositions** tab in System Configuration.
    - Go to the **Disposition Class** sub-tab.
    - Click the "Add" button to create a new Disposition Class.
    - Click the "Add New Code" option for a Disposition Class to define the individual **Disposition Codes**.
2. **Create and Configure a Disposition Plan:**
    - Go to the **Disposition Plan** sub-tab.
    - Click "Add" and provide a name for the new Disposition Plan.
    - Select the newly created plan and click the "Code Assignment option".
    - Check the boxes next to the desired Disposition Codes to assign them to the plan.
    - Click **"Apply"** to save the changes.
3. **Assign the Plan to a Campaign:**
    - Go to the relevant campaign's settings.
    - Select the newly created Disposition Plan from the appropriate dropdown menu within the campaign's configuration (e.g., General Settings).

Further Reads:

Know more on the **System Dispositions in Exotel Contact Center**

Know more on the **User Disposition in Exotel Contact Center**

Version History

Version	Enhancement	Release Notes
4.13	Two-level disposition dropdowns (class → code) made the default selection mode	

7.4.7. Holiday/Office Timings

Overview

The **Holiday/Office Timings** feature defines the official working hours and holidays for the contact center. It is a fundamental function for managing call center availability, ensuring that system actions and customer interactions adhere to the defined operational schedule.

The primary purpose is to:

- **Restrict dialing** or customer contact during non-office hours or holidays.
- **Manage customer expectations** and prevent poor performance metrics by preventing call failures when agents are unavailable.

Key Benefits

- **Compliance and Efficiency:** Prevents failed callback attempts by automatically restricting scheduling beyond the defined office hour timings.
- **Customizable Scheduling:** Allows defining flexible working hours and marking specific dates or recurring days as non-working holidays.
- **Tiered Control:** Configuration can be set at the system, campaign, and queue levels, providing fine-grained control over scheduling rules.
- **Service Integrity:** Helps the operations team avoid handling callbacks, inbound, and outbound calls together during designated windows.

Functionality

The module consists of two main sections: **Working Hour Configuration** and **Holiday Configuration**, which can be configured at multiple levels.

Configuration Hierarchy

The configuration is hierarchical and is used for specific campaign types:

1. **Queue-Level:** Configuration set by the **Supervisor** for specific queues in Chat, Interaction, and Inbound Campaigns. **Overrides** Campaign-level and System-level

settings.

2. **Campaign-Level:** Configuration set by the **Administrator/Voice-Admin** for a specific campaign. **Overrides** System-level settings.
3. **System-Level:** Baseline configuration for the entire contact center, set by the **Administrator/Voice-Admin**.

Working Hour Configuration

The Administrator/Voice-Admin must first enable the working hours at the system level.

- **Daily Scheduling:** Users define the **Start Time** and **End Time** for each day of the week.
- **Callback Hours:** Administrators can also configure a specific start and end time window dedicated solely to scheduling **callback calls**.

Holiday Configuration

The Administrator/Voice-Admin must first enable the holiday feature at the system level.

- **Specific Dates:** Users can select individual dates on a calendar to mark them as a **Holiday** or a **Working Day**.
- **Reoccurring Holidays:** The system allows setting recurring holidays, such as marking *All* days of the month as a holiday, or setting *First Alternate Days* or *Second Alternate Days*.

Prerequisites

- **Licensing:** This is a **Licensed Feature**, and the appropriate license component must be procured for the center for the tab to be visible and functional.
- **Enabling:** Both **Working Hour Configuration** and **Holiday Configuration** must be explicitly enabled at the system level before specific hours or dates can be configured.

Usage Instructions

The configuration is managed by **Administrator/Voice-Admin** at the system and campaign levels, and by **Supervisor** at the queue level.

Configuration (Admin/Voice-Admin)

1. **Enable Modules:** Navigate to the **Holiday/Office Timings** tab in System Configuration and slide the status bar to the right to enable **Working Hour Configuration** and **Holiday Configuration**.
2. **Define Working Hours:** Input the **Start Time** and **End Time** for each day of the week, clicking **"Add"** to apply the duration for that day.
3. **Define Holidays:** Use the calendar interface to mark specific **"Date"** holidays or select **"Day"** for reoccurring holidays (e.g., selecting *First Alternate Days*).
4. **Configure Callback Restriction:** Under **Holiday Office Hour Restriction in Non-Office Hours**, define the callback start and end times to limit when callback calls can be scheduled.
5. **Apply and Copy:** Click **"Apply"** to save changes. Settings can be copied to other campaigns using the copy function.

Usage by Personas

- **Agent & Supervisor (Callback Scheduling):**
  - When scheduling a callback, the agent or supervisor attempts to select a date and time.
  - The system will **disable holiday dates** on the calendar and display an **error message** if a non-permissible time is selected.
  - If an existing scheduled callback's time later falls under a holiday/non-working hour due to a policy change, the system automatically adjusts the call to be **initiated in the next working hour**.
- **Agent (Chat/Interaction):**
  - When customers send chat or email messages during configured non-office hours or a holiday, the ticket is flagged as **Offline** or **Missed**.
- **Supervisor (Monitoring):**
  - The Dashboard displays the **Offline** chat count, showing the total number of chats received during holiday/non-working hours.

Access & Permissions

UI paths (one feature, three hierarchy surfaces):

- **Contact-center baseline**: Administrator Console > **System Configuration** > **Holiday/Office Timings** tab.
- **Campaign override**: **Process > Campaign > Settings > Holiday/Office Timings** tab (Voice/Outbound/Inbound/Chat/Interaction campaigns).
- **Queue override**: **Supervisor Console > Manage > Queues** > select a queue (Chat / Interaction / Inbound) > **Holiday/Office Hours**.

Required Privileges

The UI and REST endpoints under `/holidayAndOfficeHour/*` are gated by two privilege groups – `holiday-configuration` and `office-hour-configuration` – each carrying parallel **View / Search / Add / Configure (enable toggle) / Delete** privileges for the contact-center and campaign scopes:

Scope	Privilege keys
Contact Center – Holiday	`dacx-cc.admin.holiday.view-cc-holiday`, `.search-cc-holiday`, `.add-cc-holiday`, `.configure-cc-holiday`, `.delete-cc-holiday`
Contact Center – Office Hour	`dacx-cc.admin.office-hour.view-cc-office-hour`, `.search-cc-office-hour`, `.add-cc-office-hour`, `.configure-cc-office-hour`, `.delete-cc-office-hour`
Campaign – Holiday	`dacx-campaign.admin.holiday.view-campaign-holiday`, `.search-campaign-holiday`, `.add-campaign-holiday`, `.configure-campaign-holiday`, `.delete-campaign-holiday`
Campaign – Office Hour	`dacx-campaign.admin.office-hour.view-campaign-office-hour`, `.search-campaign-office-hour`, `.add-campaign-office-hour`, `.configure-campaign-office-hour`, `.delete-campaign-office-hour`

Callback-only variants (granted independently so an administrator can manage holidays generally without also managing the callback window): `cc.admin.callback.holiday.*`, `campaign.admin.callback.holiday.*`, `cc.admin.callback.office-hour.*`, `campaign.admin.callback.office-hour.*` (plus matching `view-*-callback` privileges).

Default role assignments (from `rolesConfiguration.yaml`): Administrator, Supervisor, Group Manager, Monitoring Agent, Analyst, Executive, and the System role all receive the `holiday-configuration` and/or `office-hour-configuration` groups. Supervisors use the privileges to manage **queue-level** settings for their assigned Chat / Interaction / Inbound queues.

Configuration Parameters

Setting	Scope	Where to configure	Notes
Working Hours enable toggle	CC / Campaign / Queue	Holiday/Office Timings tab, **Working Hours** slider	When OFF, individual day rows are read-only.
Start / End Time per day	CC / Campaign / Queue	Working Hours table (Mon–Sun)	Stored as `HH:mm` 24-hour values; tenant time zone applies.
Holiday enable toggle	CC / Campaign / Queue	**Holiday Configuration** slider	When OFF, the calendar rejects new entries.
Holiday entry – **Date**	CC / Campaign / Queue	Calendar > pick a day > **Date** radio	Pins holiday to a single calendar day.
Holiday entry – **Day**	CC / Campaign / Queue	Calendar > pick a day > **Day** radio > **All / First Alternate Days / Second Alternate Days**	Creates a recurrence rule on the same weekday.
Callback Office Hour	CC / Campaign	Callback section on the same tab	Restricts **callback** scheduling only; other dialing is governed by Working Hours.
Callback Holiday calendar	CC / Campaign	Callback section (separate calendar)	Independent of the main Holiday calendar.
Copy to other queues	Queue	Queue row > **Copy holiday office hours configuration** action	Copies working hours + holidays from the source queue to other queues in the same campaign.

The full settings resource is exposed via `/holidayAndOfficeHour/*` REST endpoints (including `getAllQueuesWithHolidayOfficeHourConfigurations` for the queue roll-up

view).

Limitations & Warnings

- **Licensed feature**: The tab is hidden entirely when the **Holiday/Office Timings** license component is not active.
- **Hierarchy precedence**: Queue > Campaign > Contact Center. Lower layers **override** rather than merge, so leaving a field blank on a queue does not inherit from the campaign.
- **Retroactive callback shift**: If the administrator edits working or holiday hours **after** callbacks have been scheduled, every affected callback is silently re-scheduled to the next permissible working hour. There is no preview or approval step.
- **Alternate-day recurrence**: *First* and *Second* alternate-day starts on the same weekday are mutually exclusive; creating both yields duplicate holidays.
- **Time zone**: Working hours use the tenant's contact-center time zone (set separately). Multi-region tenants must model regions as separate campaigns/queues with their own schedules.
- **Chat & Interaction**: Traffic received during a holiday/non-office hour is tagged **Offline** / **Missed**. Offline handling (auto-reply, ticket creation, routing after hours) is shaped by separate *Offline Message* and *Routing Rules* settings — not by this feature alone.
- **Callback Management license**: The Callback Office Hour and Callback Holiday sub-sections are only visible when the Callback module is licensed and enabled for the campaign.

Related pages

- **Holiday/Office Timings (Licensed Feature)** — sibling page with the step-by-step admin walkthrough and screenshots.
- **Callback Management** — interaction between the callback window defined here and callback scheduling.
- **Callback Management in a Campaign** — campaign-level override for callback hours.
- **Queue Management** — Supervisor surface for queue-level overrides.
- **Process Management** — parent hierarchy under which these settings are inherited.
- **System Configuration** — admin surface that hosts the contact-center baseline.

- **Campaign Configuration** – campaign-level override surface.
- **Offline Message** – how Chat / Interaction channels handle traffic received outside office hours.
- **Routing Rule for Offline Chat** – routing for chats received during non-office hours.
- **Licensing** – how the Holiday/Office Timings license is allocated.

7.4.8. Callback Management

Overview

The Callback feature enables agents to schedule a return call to a customer, primarily used for follow-up or when a customer requests to be called back. The feature supports various callback types, including **Queue Callback, Campaign Callback, Self Callback, and Preview Callback**. In the contact center, a scheduled callback call is categorized as an **outbound.callback.dial Call Type**.

Key Use Cases and Benefits

Use Cases

- **Non-Office Hour Management:** It addresses situations where a customer requests a callback outside of the configured office hours or holidays. The system restricts agents from scheduling calls during these non-permissible times, which is useful when the operations team needs a dedicated window for other tasks or wants to define clear callback boundaries.
- **Customer Follow-up:** It facilitates scheduling return calls for further follow-up after the current communication ends.
- **Agent-Specific Workload:** The **Self Callback** option ensures that a specific agent handles the continuation of the customer's query, maintaining context and ownership.

Benefits

- **Reduced Call Failure Rate:** By restricting callback scheduling outside designated office/working hours, the feature helps prevent callback calls from failing, thus avoiding a high count in failed callback attempts.
- **Improved Operational Control:** It grants administrators and supervisors fine-grained control over when outbound callbacks can be scheduled, with campaign-level configuration overriding system-level settings.
- **Proactive Notification:** Agents and supervisors receive timely **Callback Reminder Bell Notifications** about upcoming scheduled calls, including the customer's phone number, campaign name, and scheduled time, ensuring the commitment is met.

Usage Across the Product

Agent Scheduling Flow

The agent schedules a callback through the disposition process immediately after a call is disconnected.

- **Disposition Class:** For a disposition to enable the callback scheduling options, it must be assigned to the appropriate disposition class (schedule.callback) configured in the disposition plan.
- **Initiation:** The agent must dispose of the call by selecting the appropriate **"callback"** disposition value from the disposition drop-down menu.
- **Callback Type:**
  - To schedule a call only to themselves, the agent must check the **“Self Callback”** option.
  - If **“Self Callback”** is unchecked, the scheduled callback will be routed to any **available user in the campaign**.
- **Scheduling Details:** The agent specifies the required date/time by choosing either **"Specify date"** (to select a specific date and time from a calendar/clock) or **"Specify time"**.
- **Number Selection:** The agent can schedule the callback for the **"Existing Numbers"** (the number dialed in the current call) or provide an **"Alternate Number"**.
- **Finalizing:** The callback is finalized and logged by clicking the **"Save And Dispose"** button.

Agent Management and Notifications

Agents manage and receive notifications related to their scheduled callbacks.

- **Agent Management Location (Navigation):** The scheduled callbacks list is available to the agent under the **Call Details** tab in the **Callbacks** sub-tab of their console.
- **Notifications:** Agents are notified of upcoming callbacks via a **Callback Reminder Bell Notification**. The notification contains the customer's **phone number, the campaign name, and the scheduled time**.
- **Actionable Notifications:** The callback notification is clickable. Clicking the customer's number in the notification will trigger a **manual dial** to that number. This action

removes the callback from the pending list once the number is dialed.

- **List View Actions:** From the callbacks list, agents can:
  - **Click to Dial Callback:** Dial the number directly from the list. If successfully dialed (or attempted), the callback is removed from the list.
  - **Reschedule Callback:** Edit the date and time of the callback. A reason for rescheduling is mandatory.
  - **Delete Callback:** Remove the scheduled callback. A reason for deletion is mandatory.

Settings and Configuration

1. Administrator/System-Level Controls (Campaign Creation)

These settings are configured at the Campaign level by the Administrator and manage the boundary limits:

Setting	Location/Role	Description
Maximum Callback Count	Administrator (Campaign Settings)	Specifies the **maximum number of callbacks** a user can make for an outbound campaign.
Holiday/Office Hour Restriction	Administrator (System/Campaign Level)	Prevents callbacks from being scheduled during non-working hours/holidays. **Campaign-level overrides system-level setting**.
Call Type Reporting	Reports	The call is officially logged in reports (e.g., Call Details Report) under the **outbound.callback.dial** Call Type.

2. Supervisor Callback Management (Navigation)

Supervisors manage callback settings and the central list of scheduled calls for all their agents.

- **Management Location:** Supervisor Console > **Manage** tab > **Callback Management in a Campaign**.
- **Configuration Settings (Settings tab):**
    - **Self Callback (Default):** If checked, callbacks created using force dispose default to "Self Callback".
    - **Max Callback Days:** Defines the maximum number of days after which the callback is **deleted from the system**.
    - **Promote To Campaign Expiry Time (min):** The duration after which an unattended self callback expires and is transferred/promoted back to the campaign queue for routing to any available agent.
    - **Callback Retry Time (min):** The time interval after which a failed callback attempt will be re-dialed.
    - **Callback Reminder (min):** The time *before* the scheduled time when a callback reminder notification is displayed to the assigned agent or supervisor.

3. Supervisor List View Actions

The main list of callbacks (accessible via the Callback Management tab) allows the supervisor to manage the queue:

Action	Description
Add a Callback	Manually schedule a new callback.
Edit Callbacks	Modify the date, time, phone number, and assigned user for existing callbacks. A reason is mandatory for the change.
Search/Filter	Filter the view based on user groups, scheduled users, time range (scheduled or added date), or phone number.
Extract Callbacks	Export the details of selected callbacks to a CSV file on disk.
Delete Callback	Permanently delete a scheduled callback. A reason for deletion is mandatory.
Bulk Migration (Licensable)	Upload extracted callbacks to potentially move them between campaigns.
Change User Assignment (Bulk)	Select multiple callbacks and either promote them back to the campaign queue or reassign them to a specific user.

7.4.9. Customer Provider types

Overview

Customer Providers define the strategy for sourcing, prioritizing, and managing customer contact numbers for dialing campaigns. The system supports various providers, each designed for specific outbound campaign goals and complexity levels, including **Campaign Based**, **Lead Based**, and the advanced **PACE Based** Customer Provider.

1. Campaign Based Customer Provider

This provider focuses on managing the customer cache size and the order in which customers are fetched from the database for dialing.

Parameters

- **minCacheSize**: This parameter sets the minimum threshold. If the total numbers present in the cache are less than this minimum value, numbers will be fetched from the database and stored in the cache.
- **fetchSize**: This specifies the total number of customers to be fetched at a time for this campaign.
- **fetchRandomCustomers**: This parameter has been **Deprecated** from release 3_02.40 onwards. If enabled, customers will be fetched from the database in random order. However, this is not preferred because it will slow down fetching.
- **fetchOrderPolicy**: Customer numbers will be fetched in the configured order. Fetch Order can be **FIFO**, **LIFO**, **RANDOM**, **NO_ORDER**, **ATTEMPT_ASC**, **ATTEMPT_DESC**, **DATA_TABLE_ASC**, or **DATA_TABLE_DESC**. This functionality is a **Licensed feature** (**allowFetchOrder**).
- **fetchOrderColumnName**: This field is only applicable if **DATA_TABLE_DESC** or **DATA_TABLE_ASC** is selected in the fetch order policy. It specifies the column name which will be used for sorting customers while dialing.

2. Lead Based Customer Provider

The Lead Based Customer Provider is used for dialing customers according to their **lead priority**. Customers with high priority will be dialed first, followed by customers of lower priority. If two leads have the same priority, numbers will be dialed according to their weights.

Recommended For

- Scenarios where leads must be processed equally (leveled) at any given time.
- **Parallel Predictive Dialer (PPD)** campaigns, as it is recommended to maintain a cache per lead so that all queues get sufficient numbers, if available.
- Campaigns utilizing lead to user mapping.

3. PACE Based Customer Provider

What is PACE?

PACE (**P**ro **A**ctive **C**onnect **E**nhancer) is a customer provider. The PACE Customer Provider, together with Ameyo's Predictive Dialer, forms the **PACE Solution**. It is responsible for maintaining the cache from which the dialer can pick customers and dial.

When to Use PACE?

PACE should be used when **customer behavior is known** to the industry beforehand. By analyzing this behavior, rules can be written that PACE uses to increase the overall productivity of the contact center.

Business Use Cases

1. **Business Usecase 1 (Targeted Redialing):** If a **CONNECTED** call is a SALE, customers with system dispositions like **FAILED**, **AMD**, or **PROVIDER_FAILURE** are known to exhibit specific behavior. Using PACE, you can restrict the dialer from calling such customers again (or dial them less frequently), which conserves bandwidth and prevents a decrease in the speed of profit. Conversely, you can force **CONNECTED** numbers to be dialed again if the contact center requires it.
2. **Business Usecase 2 (State-Based Dialing Strategy):** In Collection or Sales scenarios, the process of converting a customer requires an attached dialing strategy. This strategy can be broken down into **states** that are attached to the customer as rules are executed. For example: If a customer is not picking up the call at 9 am (state: **OfficeTravelling**), the

rule can be: If (SYSTEM_DISPOSITION='NO_ANSWER' OR SYSTEM_DISPOSITION ='PROVIDER_TEMP_FAILURE') then CallAroundTime='05:00:00' and NotCallBefore='04:00:00'.

Categorization of Customers (States)

PACE categorizes customers into groups called **states** where the customer's behavior is known. These states are defined by the client, and a specific dialing percentage can be defined for them.

For example, numbers with a system disposition of **FAILED** can be grouped into a state called **BAD**, other customers into a **GOOD** state, and customers not yet dialed into **FRESH_CUSTOMERS**. A sample dialing percentage could be: **freshCustomers (40%)**, **GOOD (50%)**, and **BAD (10%)**.

After the first attempt, the system knows the customer's state, and PACE will try to follow the dialing percentage. If there are 100 agents, the dialer will pick numbers in that ratio (40 fresh, 50 good, 10 bad) when all agents are idle and dial.

To define these states, select the customer provider in **Advance settings** for the campaign, then go to the **supervise view** and under **dialer settings**, define states in the lower-left area.

Rules

PACE works on the category of customers, and these categories are maintained by **PACE Rules**. All customers start with a **CONNECTION_STATE** of 'freshCustomer'.

- **Simple Pace Rule:** An example rule is: if system_disposition is FAILED and CONNECTION_STATE='freshCustomer' then TARGET_CONNECTION_STATE='BAD'.
    - **NCB (Not to Call Before):** A timestamp that means the customer will not be dialed before this time.
    - **CAT (Call Around Time):** A timestamp around which the customer will be dialed. *Note: This is not enforced; it depends on various factors.*
- **Complex Pace Rule:** Involves uploading a JavaScript file where the entire logic is written (e.g., as written for TATA SKY).

Rules are created under the **Customers** tab in the manage view and then assigned to the campaign.

7.4.10. Fetch Order Policy

Overview

The **Fetch Order Policy** is a specialized, licensable feature found in the Advanced Settings of voice campaigns that controls the sequential logic of customer number retrieval for outbound dialing. Its purpose is to define the exact order in which the dialer fetches customer records from the leads, ensuring critical numbers are prioritized according to business strategy.

Key Benefits

- **Strategic Prioritization:** Ensures customers are dialed in a defined order, which can be based on upload time, retry attempts, or custom criteria.
- **Compliance Control:** Allows adherence to dialing rules by prioritizing based on criteria like User Disposition Retry Time.
- **Customizable Logic:** Provides the ability to create customized JavaScript code for complex dialing order requirements.
- **Configuration Override:** Policies configured at the Filter Group level override the Fetch Order Policies configured at the Administrator's campaign-level.

Functionality

The feature involves adding and defining policies to dictate the sequence in which customer numbers are fetched for dialing. A maximum of **five** Fetch Order Policies can be applied simultaneously.

The available policy types include:

- **Customer Upload Time:** Customers are selected based on when their numbers were uploaded to the campaign. Sorting can be set to ascending (first uploaded dialed first) or descending (last uploaded dialed first).
- **Randomized order of lead upload:** Customers are selected randomly from the lead list using a random algorithm.

- **Natural Order of Lead Upload:** Customers are selected in the exact order in which they were originally presented in the uploaded CSV file.
- **Number of Attempts:** Customers are selected based on the number of dialing attempts already made to their numbers. Sorting can be set to ascending or descending order.
- **Customer Information:** Customers are selected based on the ascending or descending order of values found in any designated customer information field.
- **User Disposition Retry Time:** Customers are selected based on the retry time attached to their last disposition. Sorting options allow dialing those with the least retry time first (ascending) or the highest retry time first (descending).
- **CUSTOM:** Allows the use of customized JavaScript code to define a unique, tailored order for selecting customers.

Prerequisites

- **Licensing:** This is a **Licensed Feature** and requires the appropriate license component to be visible and functional.
- **Campaign Type:** The policy applies to outbound campaigns, including Outbound Voice Campaign, Parallel Predictive Voice Campaign, and Voice Blast Campaign.
- **Sorting Preference:** For policies like *Customer Upload Time*, *Number of Attempts*, and *User Disposition Retry Time*, the administrator/supervisor must specify an **Ascending** or **Descending** order.
- **Customer Field Selection:** For the *Customer Information* policy, a specific customer information field must be selected to determine the sorting basis.

Usage Instructions

Fetch Order Policies are managed in the campaign settings, typically under the Advanced tab or within Lead Management features in the Supervisor Console.



1. **Access Settings:** Navigate to the Outbound, Parallel Predictive, or Voice Blast Campaign settings.
2. **Locate Policy Section:** Go to the **Advanced Settings** tab, and find the **Fetch Order Policy** section. In the Supervisor Console, this may be found within **Manage Lead** or **Manage Filter Groups** tabs.
3. **Add a Policy:** Click the "Add" or "+" icon to add a new policy.
4. **Select Policy Type:** Choose one of the available policy types from the dropdown menu (e.g., *Customer Upload Time* or *User Disposition Retry Time*).
5. **Configure Parameters:** Set the necessary parameters, such as selecting the sorting order (Ascending or Descending) or choosing a customer information field.
6. **Apply Policies:** Click **Apply** to save and implement the new fetch order policies for the campaign.

7.4.11. Advanced Campaign Configuration

Overview

The **Advanced** settings tab in campaign configuration is where administrators define the core, often technical, operational parameters for a specific campaign. These settings control the campaign's data sources, disposition logic, user interface, and outbound dialing algorithm performance. By customizing these values, administrators can optimize the campaign's efficiency, data handling, and compliance.

Parameter Explanations

Data and Interface Definitions

- **Associated Table Definition**
  - **Function:** This parameter specifies the **data table structure** that the campaign uses to store and retrieve customer-related information.
  - **Example:** If set to DefaultTableDefinition, the campaign uses the primary, predefined table structure for all its customer data needs.
- **By default assign users to Agent Table Definition**
  - **Function:** This parameter selects the **template or layout** that determines how customer information is displayed to agents on their console for this specific campaign, including which fields they can view or edit.
  - **Example:** If set to DefaultAgentTableDefinition, agents see the standard, pre-configured view of the customer record.
- **Column mappings**
  - **Function:** This policy defines how the **columns (fields)** of the data file or source are mapped and aligned with the internal column names of the database table, ensuring data integrity during upload or retrieval.
  - **Example:** If set to DefaultOutboundColumnMapping, the campaign follows the standard rules for aligning outbound-related data fields.

Dialer and Data Retrieval

- **Customer Provider Type**
  - **Function:** This parameter selects the **dialer algorithm** or logic used to select and queue customer records from the database for outbound dialing. It is crucial for campaign performance and pacing.
  - **Options:** Options include Campaign Based Customer Provider, Lead Based Customer Provider, and PACE Based Customer Provider, each having a distinct method for lead prioritization and retrieval.
- **Min Cache Size**
  - **Function:** This defines the **minimum size of the cache** (measured in the number of customer records) that the Customer Provider (dialer algorithm) must maintain at a given time. This value is used to ensure a continuous supply of numbers for dialing.
  - **Example:** A value of 1000 means the dialer always tries to keep at least 1,000 records ready in its memory cache.
- **Fetch Size**
  - **Function:** This value specifies the number of customer records the dialer retrieves from the database **in a single query** when refilling its cache.
  - **Example:** A value of 500 means the dialer executes a query to fetch 500 records whenever the cache drops below a certain threshold.

Operational and Compliance

- **Disposition Plan**
  - **Function:** This selects the specific plan that dictates which **Disposition Codes** (reasons for the call outcome, like "Sale," "Busy," "DNC") and corresponding disposition classes are available for agents to use when wrapping up a call.
  - **Example:** If set to DefaultOVCDispositionPlan, the campaign uses the standard set of wrap-up codes for outbound voice campaigns.
- **Restrict disposition from telephony panel**
  - **Function:** When enabled, this setting prevents agents from submitting a disposition code via their **telephony panel**. The agent is thus **forced to dispose of the call through the CRM (Customer Relationship Management) only**.

    - **Purpose:** This prevents agents from submitting conflicting or duplicate disposition codes, ensuring data is consistently managed in the CRM.
- **No. of Last Calls**
    - **Function:** This parameter specifies the maximum number of previous call records (history) the system maintains and displays for a specific customer within this campaign.
    - **Example:** A value of 10 means the agent will see a history of the last 10 interactions with that customer.
- **File Format**
    - **Function:** This determines the specific **audio file format** used by the system for saving all call recordings (Voicelogs) generated by the campaign.
    - **Example:** Options include formats like tulaw, alaw, tgsm, tg729, or the default talaw.

Prerequisites

- The campaign must be a Voice Campaign (Outbound, Predictive, or Interactive Voice Application).
- Associated system objects such as **Table Definitions** and **Disposition Plans** must be pre-configured and available in the system before they can be selected in the campaign's Advanced Settings.

7.4.12. Campaign Settings

Overview

Campaign Settings refer to the core set of configurable parameters that dictate the operational behavior, capacity, and service performance of a specific voice campaign (such as Inbound, Outbound, or Predictive). These settings are crucial for establishing system constraints, managing customer interactions, and defining the logic for call identification and routing based on time and service levels.

Key Benefits

- **Capacity Control:** Limits the maximum number of simultaneous calls (Peak Call Count) to prevent network congestion or overburdening agents.
- **Branding & Call Identification:** Ensures accurate identification of the caller by setting a fixed or dynamic Caller ID (DID Number) for outbound calls.
- **Service Level Adherence:** Defines the SLA Threshold (Service Level Agreement) to measure the quality of service for inbound calls.
- **Regulatory Compliance:** Uses Time Zone Mapper Type settings to restrict dialing based on a customer's local time zone, aiding compliance.
- **Dialing Discipline:** Manages efficient resource usage by ensuring disconnected calls are properly terminated via Dial On TimeOut.

Functionality

Campaign Settings house the following specific parameters:

Peak Call Count

The maximum number of simultaneous calls allowed within the campaign.

Controls campaign capacity and maximum throughput, especially during peak hours.

Caller ID

The DID (Destination Phone) number displayed as the calling party ID for outbound communications.

Facilitates call identification; defaults to "NODID" if not configured.

Max Callback Count

The maximum number of callbacks a user is permitted to schedule or execute.

Limits callback attempts per user to manage follow-up strategies.

Mapper Types

- Lead Based Campaign Time Zone Mapper
  - In this case, the time zone of the customer is explicitly specified from the time zone data included within the lead settings.
- Default Campaign Time zone Mapper
  - The customer's time zone is determined directly from the customer data.
  - The system uses the time zone information from the column designated for time zone mapping within the campaign configuration.
- Phone Pattern Based Campaign Time zone Mapper
  - This is a method related to number management in the system.
  - It allows the mapping of a country code and area code to a specific time zone.
  - All numbers matching that country code and area code will be dialed according to the defined time zone restriction or criteria.

Dial On TimeOut (in secs)

Defines the maximum time (in seconds) the dialer will attempt to connect a call before automatically disconnecting if the customer is not connected.

Automatically disconnects calls that fail to connect within the specified duration, freeing up system resources.

SLA Threshold (in secs)

The target duration (in seconds) within which inbound calls should ideally be answered.

Provides the benchmark for Service Level Agreement calculation ; default value is 20 seconds.

Prerequisites

- **Campaign Creation:** These parameters can only be configured after an Interactive Voice Application (Inbound) or Outbound Campaign (Outbound, Predictive, Voice Blast) has been successfully created.
- **Time Zone Data (for Mapping):** For Lead-Based mapping, the customer's time zone must be specified within the lead data. For Phone Pattern/State mapping, country/area codes or state data must be mapped to a time zone.

Usage Instructions

Campaign Settings are configured in the **General Settings** section of a campaign's administrative settings.

1. **Access Campaign Settings:** Navigate to the **Process Tab** in the Administrator/Voice-Admin Console. Select the target Voice Campaign.
2. **Open General Settings:** Click the **Settings** tab, then the **General Settings** sub-tab.
3. **Configure Parameters:** Locate the **Campaign Settings** section and provide the values:
    - Enter the numerical limit for **Peak Call Count**.
    - Enter the DID number for **Call ID** (Caller ID).
    - Select the **Time Zone Mapper Type** (Lead Based, Default, Phone Pattern, or State Based) to define how dialing restrictions are applied.
    - Enter the maximum value in seconds for **Max Callback Count**.
    - Enter the disconnection time in seconds for **Dial On TimeOut (in secs)**.
    - Enter the service time limit in seconds for the **SLA Threshold (in secs)**.
4. **Save Changes:** Click the **Apply** button to save and activate the new settings.

7.4.12.1. Omni-channel Campaign Configuration (6X Voice Process)

The **Omnichannel Campaign Enhancement** is a strategic feature that introduces Omnichannel capabilities to the existing 6X Voice Process at the **Campaign Level**. This feature allows businesses to retain their powerful **Auto-Dialer** and **Lead-centric** workflows–including existing Voice Blending capabilities–while empowering agents to handle Digital Interactions (Chat, WhatsApp etc) within a **Unified Agent Desktop (UAD)**.

Administrators can "promote" specific Voice Inbound campaigns to handle digital channels without altering the entire Voice Process or affecting other campaigns running in the same environment.

2. Key Architectural Concepts

2.1 Campaign-Level Promotion

- **Scope:** This is a **Campaign Level** configuration, not a Process Level change. You can have a "Standard Voice Campaign" and an "Enhanced Omni Campaign" running simultaneously within the same Voice Process.
- **Legacy Model:** Supported **Voice Blending** (Inbound + Auto-Dialer/Outbound) but operated independently of digital channels.
- **Enhanced Model:** Specific **Voice Inbound Campaigns** are promoted to **Omni Inbound Campaigns**. This single campaign type now serves as the "anchor" for:
    - Inbound Voice calls & Auto-Dialer calls (Existing Voice Blending).
    - Digital Inbound interactions (Customer responses).
    - Manual Digital Outbound tasks.
- **Data Structure:** The system retains the **Lead-based** data structure. It does *not* force a migration to a "Clean Contact" object, ensuring compatibility with existing lead upload workflows.

2.2 Unified Agent Desktop (UAD)

Agents no longer need to toggle between screens. The UAD provides a "Single Pane of Glass" view where:

- **Voice & Digital Coexist:** An agent can view an active Chat window alongside a Dialer interface.
- **Interaction History:** A consolidated timeline displays previous calls and digital messages for the Lead.
- **Dual Login:** Agents can access the system via the legacy interface (/app) or the new Omni interface (/omniapp) based on the specific campaign they are logging into.

3. The Blending & Capacity Engine

The core of this enhancement is the **Max Capacity Pool** logic, which dictates how interactions are routed to agents within the enhanced campaign.

3.1 Capacity Pool Definitions

Every agent is assigned a **Max Capacity** value (Default: 10). Different interaction types consume this capacity differently.

Interaction Type	Consumption Rule	Description
Digital Inbound	**Consumes Capacity**	Routing stops if Current Load >= Max Capacity.
Manual Digital Outbound	**Consumes Capacity**	Agent-initiated tasks (e.g., sending a WhatsApp template) reduce available capacity for new inbound tasks.
Inbound Voice	**Consumes Capacity**	Typically consumes a significant portion (or all) of the capacity. Blocked if the pool is full.
Manual Voice Outbound	**Conditional**	• **Via Omni Inbound Campaign: Consumes Capacity.** Blocks/Reduces Digital flow. • **Via Outbound Campaign: Does NOT Consume Capacity.** Digital interactions can still arrive.
Auto-Dialer Voice	**Bypasses Capacity**	**The Exception:** The Dialer logic *ignores* the Digital capacity pool. An agent can receive a dialer call even if their capacity is 100% full.

3.2 The "Single Voice Channel" Constraint (Existing Behavior)

The system maintains the standard Voice Blending rule: an agent is physically restricted to **one active voice interaction** at a time.

- **Scenario:** If an agent is on an Auto-Dialer call, they are marked "Busy" for Inbound Voice, even if they have 0 Digital interactions.

3.3 Blending Matrix (Routing Behavior)

The following matrix describes how the system handles concurrent interaction attempts.

Current Agent State	Incoming Interaction	Routing Decision	Reason
Handling Digital (Capacity Available)	**Digital Inbound**	**Delivered**	Capacity pool has space.
Handling Digital (Capacity Full)	**Digital Inbound**	**Queued / Blocked**	Max Capacity reached.
Handling Digital (Capacity Full)	**Inbound Voice**	**Queued / Blocked**	Max Capacity reached.
Handling Digital (Capacity Full)	**Auto-Dialer Call**	**Delivered**	**Exception:** Dialer bypasses capacity checks.
On Voice Call (Any Type)	**Voice Call (Any Type)**	**Not Possible** (One Voice channel at a time)	Physical voice channel is occupied (Standard Voice Blending).
On Voice Call (Any Type)	**Digital Inbound**	**Allowed**	Only if capacity permits (Voice consumes capacity, but if weight < max, digital can arrive).

4. Operational Workflows

4.1 Digital Outbound Strategy

Since this approach enhances the Voice Process, there is no "Auto Omni-Dialer."

1. **Mass Messaging:** Automated digital broadcasts are managed by other modes (e.g., **ExoCampaigns**).
2. **Inbound Response:** When a customer replies to a broadcast, the interaction enters the 6X system as a **Digital Inbound** interaction.

3. **Manual Follow-up:** Agents can initiate **Manual Digital Outbound** messages from the UAD. *Note: This action consumes Agent Capacity.*

4.2 Reporting & Supervision

- **Reporting:** Voice reporting remains unchanged (Legacy Reports). Digital interactions are logged in new Interaction tables.
- **Supervision:** Supervisors use separate views:
  - **Call View:** Monitor live voice states (Talking, Wrap, Ready).
  - **Interaction View:** Monitor digital concurrency and chat content.

5. Configuration Guide

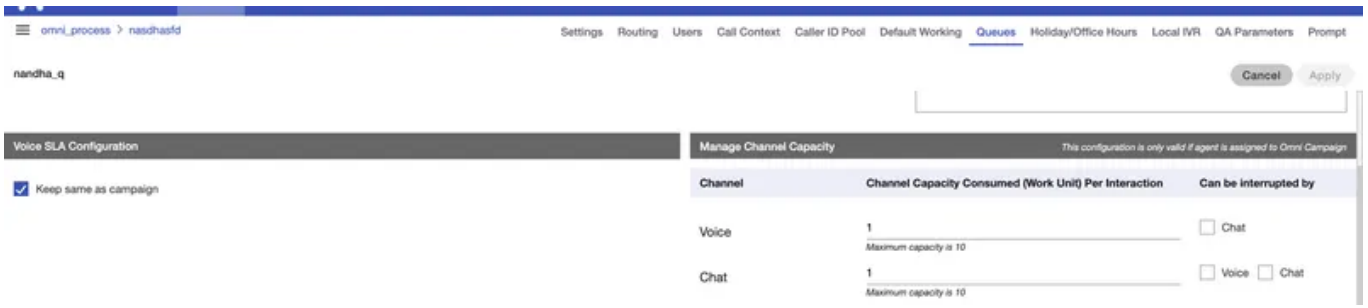
5.1 Enable Omni Capability (Per Campaign)

To promote a campaign, the enableOmniCapability flag must be set in the server_preference_store. This setting is specific to the **Context ID** (Campaign ID).

5.2 Agent Capacity Management

Capacity is managed at the User Configuration and Queue configuration is possible

Manage Channel Capacity at Queue Configuration



Manage Channel Capacity at Queue Configuration

Configure Channel Capacity per User(Agent)



Configure Channel Capacity per User(Agent)

Important: The classic interface for UAD remains Voice-Only. To handle digital interactions, agents must switch to the new Agent Workspace.

7.4.13. ACW - After call Work

Overview

ACW (After Call Work) Settings define the mandatory time duration an agent is allowed to **dispose of or "wrap" a call** after the call has been disconnected. This duration starts upon **call disconnection and ends upon its disposition**.

The primary purpose is to ensure that agents promptly complete all administrative tasks related to the interaction, such as selecting a disposition code, adding notes, or performing other customer relationship management (CRM) updates.

Key Benefits

- **Enforced Efficiency:** Mandates a specific time duration (between 1 and 3600 seconds) for call wrap-up, preventing agents from remaining in an idle state for too long after a call.
- **Automatic Disposition:** If the agent fails to dispose of the call within the configured time, the call will be **automatically disposed of**, ensuring the agent moves to the next available state.
- **Granular Control:** Allows administrators to define **separate timeout values** for calls that were successfully connected versus those that were not, offering tailored performance management.

Functionality

The ACW feature is configured at the **campaign level** and dictates the available wrap-up time for agents working within that campaign.

Mandatory Parameters

- The **ACW Timeout (in sec)** field is a mandatory field when creating or modifying a campaign.
- The provided value must be an integer between **1 and 3600 seconds**.

Configuration Types

The system allows for two types of configuration for calls:

1. **Single Timeout:** A single ACW value is set for all calls, regardless of whether they connected or not.
2. **Separate Timeouts:** The administrator can enable the option to **"Configure for Connected and Not Connected Calls,"** allowing two distinct, non-identical timeout values to be set:
    - **Connected Calls:** Calls successfully connected with both the customer and agent.
    - **Not Connected Calls:** Calls that could not be connected with either the agent, customer, or both.

Application Across Products

ACW settings apply to both voice and chat campaigns:

- **Voice Campaigns (Inbound/Outbound/Predictive):** ACW is the period after a call ends where the agent must complete the disposition process.
- **Chat Campaigns:** The ACW Connected (in secs) parameter dictates the duration after which an **idle chat session** will be automatically closed and disposed of.

Prerequisites

- The campaign must be a **Voice Campaign** (Interactive Voice Application, Outbound, Parallel Predictive) or a **Chat Campaign**.
- The **ACW Timeout (in sec)** field must contain a value between **1 and 3600 seconds**.
- If configured for separate timeouts (Connected/Not Connected Calls), the two values entered **must be different**.

Usage Instructions

1. Configuring ACW Timeout (Admin/Voice-Admin)

1. Navigate to the campaign settings for the desired Voice or Chat campaign.
2. In the **General Settings** tab, locate the **ACW Settings** section.
3. Enter the required timeout value (between 1 and 3600) into the **ACW Timeout (in sec)** mandatory field.

4. If you require different timeouts for connected vs. not connected calls, check the box labeled **"Configure for Connected and Not Connected Calls"**.
5. If enabled, ensure you enter two separate, non-identical values into the now-visible textboxes for **Connected Calls** and **Not Connected Calls**.
6. Click **"Apply"** to save the campaign settings.

2. Agent Usage of ACW

- **Voice/Call:** After the call disconnects, the agent must enter the correct **Disposition Code** and complete all wrap-up tasks **before** the ACW timer (set in the telephony panel) expires. If the agent fails to do so, the call will be **automatically disposed of**.
- **Chat:** For chat campaigns, the ACW Connected (in secs) dictates the time an idle chat session remains open before automatically disconnecting.

Related Features/Modules

7.4.14. Customer Distribution Rules

Overview

The **Customer Distribution Rules** feature automates the segregation and distribution of customer data within the system. Its core purpose is to replace the centralized **"Customer Segregation"** rule functionality and manage customer data **at the process-level** itself, rather than the system-level.

This feature ensures that data used for dialing and customer contact is processed according to predefined logic for the specific operating business unit (process), enhancing control and data relevance.

Key Benefits

- **Process-Level Granularity:** Enables the uploading and distribution of customer data specific to a business process, providing greater control and isolation of data pools.
- **Automated Data Routing:** Rules are applied at **runtime** to automatically match, move, and validate customer records from a temporary staging area (customer_prospect_<process_id>) to the active customer tables.
- **Data Integrity:** If any customer data fails to match a distribution rule, it remains **idle** in the prospect table for review, ensuring no data is improperly actioned.
- **Dynamic Lead Management:** Allows for creating, updating, and migrating customer records across leads based on specified conditions.

Functionality

This feature operates via the **"Customer Distribution Rules"** tab, accessible in the **Process Settings**.

Data Storage & Flow

1. Each Process maintains its unique and separate data structures, specifically an **Ameyo Refresh Table** (ameyo_refresh_table_<process_id>) and a **Customer Prospect Table** (customer_prospect_<process_id>).

2. Customer data is first ingested into the **Ameyo Refresh Table** and then transferred to the **Customer Prospect Table**.
3. The configured rules analyze the data in the **Customer Prospect Table**.
4. Data that successfully matches a rule is **moved** to the **Data Table Definition** of the Process and is **deleted** from the Customer Prospect Table.
5. Unmatched data remains **idle** in the Customer Prospect Table and can be manually **Exported** or **Exported and Extracted** for analysis.

Rule Actions

Rules determine the final fate of customer records in the prospect table. The two primary action types are:

- **"New" Action:** Creates a new entry according to the satisfied conditions.
- **"Upload" Action:** Handles existing and new data by simultaneously performing three actions:
    - Creates a new customer record if it doesn't exist.
    - Updates existing customer records available for distribution.
    - Updates and migrates a customer record if it is found in a lead other than the specified one.

Prerequisites

- **Process Creation:** The Process must be created to make the **Customer Distribution Rules** tab visible.
- **Backend Configuration:** Backend configuration must be done to specify where the customer data (from sources like API or FTP) should be inserted into the unique process-level tables.
- **Customer Data Presence:** Customer data must be uploaded (via CSV) or linked (via sources like Staging Database) into the relevant process's tables.

Usage Instructions

The following steps describe how to add a new **Customer Distribution Rule**:

1. Navigate to the **Process Tab** and select a Process.

2. Click on the **Customer Distribution Rules** tab.
3. Click the **"New Rule"** button.
4. Enter the **Rule Name** and **Rule Description**.
5. Define the **Conditions**:
    - Click the **"Add"** button in the Conditions section.
    - Select the **Attribute** (e.g., phone1, email, ATTEMPTS).
    - Select an **Operator** (e.g., =, !=, <).
    - Provide the corresponding **Value**.
    - Add **multiple conditions** if required and select the logical operator (**"Match any of the following"** or **"Match all of the following"**).
6. Define the **Action**:
    - Click the **"Actions"** tab.
    - Select the type of action (**"New"** or **"Upload"**).
    - Select the **Campaign** and the **Lead** onto which the customer data should be moved.
7. Click **"Save"** to create and enable the rule.

7.4.15. Reporting & Analytics

Reporting & Analytics provides supervisors and administrators with access to a wide range of historical data and performance metrics for the contact center. These reports are essential for tracking KPIs, monitoring agent performance, understanding campaign effectiveness, and making data-driven business decisions.

How It Works

The system continuously collects data on every interaction and agent activity. Users with the appropriate permissions can access a dedicated `Reports` module. Here, they can select from a list of standard reports (e.g., Agent Performance, Call Detail Report, Queue Performance), filter them by various parameters, and then view the results on-screen or export them.

Prerequisites

- The user must have supervisor or administrator permissions.
- The required report must be assigned to the Supervisor by an Administrator.

Configuration Steps

- **Add a Custom Report (Administrator):**
  - **Location:** Administrator > `Reports` > `Home` > `Report List`
  - **Action:**
    1. Click on "Add Report"
    2. Enter-
       1. Unique ReportID
       2. Report Name
       3. Upload the JRXML file
       4. Select Data Source of the report from `AmeyoDB` or `ReportsDB`
       5. Click on Next to add report.

- **Edit an existing Custom Report (Administrator):**
  - **Location:** Administrator > `Reports` > `Home` > `Report List`
  - **Action:**
    1. Edit the report name or data source or upload a new JRXML file.
    2. Click on Next to save changes.
- **View/ rerun past reports (Administrator):**
  - **Location:** Administrator > `Reports` > `Queue` > `Reports Queue`
  - **Action:**
    1. Past reports are listed in sequential order.
    2. Any past report can be viewed (upto 1 year since date of execution) or rerun, by clicking on the relevant icons for-
       1. Rerun
       2. Download in PDF (.pdf)
       3. Download as CSV (.csv)
       4. Download as Excel (.xlsx)
       5. View as HTML page
- **Assigning Report Access to Supervisors (Administrator):**
  - **Location:** Administrator > `Reports` > `Management` > `Report Privilige`
  - **Action:**
    1. The left panel contains the list of all `Reports` available in the system.
    2. Select the required report, which you want to assign or unassign from users.
    3. Select if you want to view the users "Assigned" to this report (these users can then run these reports) or users that are "Available" for this report to be assigned to (these users do not currently see this report on their interface).
    4. All the selected type of users appear in a alphabetical list, with their permission check box towards the right of their username listing. It is possible to search for a particualr user within the selected user assignment type.
    5. Enable the permission check box to give the report access to the user(s) or disable it to revoke access.
- **Assigning Supervisor Access to Reports (Administrator):**

    - **Location:** Administrator > `Reports` > `Management` > `User Privilige`
    - **Action:**
        1. The left panel contains the list of all Supervisors available in the system.
        2. Select the Supervisor for whom you want to view or assign reports..
        3. Select if you want to view the reports "Assigned" to this user (these reports are avalable to this user) or reports that are "Available" for assignment to this user(these reports do not currently appear on this user's interface).
        4. All the selected type of reports appear in a alphabetical list, with their permission check box towards the right of their report name listing. It is possible to search for a particualr report within the selected report assignment type.
        5. Enable the permission check box to give the user access to the report(s or disable it to revoke access.
- **Accessing and Running Reports (Supervisor):**
    - **Location:** `Supervisor` > `Reports`
    - **Action:**
        1. The `Reports` module is accessible from the main navigation bar.
        2. Click on a report category, such as `ACD Reports` or `CRM Reports`.
        3. Select the specific report you want to view.
        4. Use the filters at the top of the page to specify the date range, campaign, and other parameters.
        5. Click **View** to generate the report. You can also **Export** the data.

Use Cases

- **Daily Performance Review:** A supervisor runs the Agent Performance Report every morning to review the previous day's metrics for each agent.
- **SLA Monitoring:** A manager reviews the Queue Performance Report to check the service level and average speed of answer (ASA).
- **Campaign Analysis:** An administrator exports the Call Detail Report (CDR) for an outbound campaign to analyze connection rates and outcomes.

Benefits

- **Data-Driven Decision Making:** Provides the quantitative insights needed to optimize staffing, improve processes, and enhance performance.
- **Comprehensive Performance Tracking:** Offers detailed visibility into the performance of agents, queues, and campaigns.
- **Identifies Trends and Patterns:** Helps managers identify recurring issues, peak call times, and other important trends.

Limitations

- The sheer number of available reports and metrics can be overwhelming without proper training on which reports are most relevant.

Report Comparison

Starting from version 4.13.3, the platform includes **default comparison rules** that allow administrators to compare two report runs side by side and highlight differences. In version 4.13.4, comparison reports gained the ability to **export only mismatched rows**, making it easier to audit data discrepancies without sifting through large result sets.

Scheduled `reportsdb` Cleanup

Starting from version 4.13.9, a scheduled job can be configured to **clean up stale data in the** `reportsdb` database. This prevents unbounded growth of the reporting database and keeps report generation performant over time.

Default Reports and Extended Columns

Starting from version 4.13.32, additional **default reports** are included out of the box, and several existing reports have been enhanced with **extra columns** to provide richer data coverage without requiring custom JRXML development.

Version History

Version	Enhancement	Release Notes
4.13.1	Initial feature documentation	–
4.13.3	Default report comparison rules	
4.13.4	Comparison reports can export mismatched rows	
4.13.9	Scheduled `reportsdb` cleanup	
4.13.32	New default reports and extra columns	**Contact Center - Patch Release Notes - Version 4.13.32**

7.4.16. Call Recording

Overview

Call Recording is the process of capturing the audio of phone conversations. The recordings are stored securely and can be retrieved for quality assurance, training, dispute resolution, and compliance purposes.

How It Works

The system can be configured to record calls for specific or all campaigns. When a call takes place, the system captures the audio and saves it as mp3 audio files. Supervisors can then search for and play back these recordings from a dedicated interface.

Prerequisites

- Recording must be enabled by an administrator.
- By default, calls are recorded only when connected to an agent.

Configuration Steps

- **Enabling Call Recording (for a campaign):**
  - **Location:** `Administrator` > `Process` > `[Process Name]` > `[Campaign Name]` > `Settings` > `General`
  - **Action:** In the Voice Logs Setting section, select the checkbox labeled Voice Logs Enabled.
- **Accessing Recordings (Supervisor):**
  - **Location:** `Supervisor` > `Manage` > `Call Details`
  - **Action:** Search for interactions. Calls with a recording will have a Play icon. Click it to open the media player.

Use Cases

- **Dispute Resolution:** A supervisor retrieves a call recording to verify what was agreed upon during a conversation.
- **Agent Coaching:** A supervisor and agent review a recorded interaction to identify strengths and areas for improvement.

Benefits

- **Provides Complete Context:** Offers a full understanding of an agent's performance by showing what was said.
- **Mitigates Risk:** Provides an objective, factual record of interactions, which is invaluable for resolving disputes.
- **Foundation of Quality Management:** Recordings are the raw material for any effective quality assurance program.

Limitations

- Storing audio files requires significant data storage capacity.
- Organizations must comply with legal requirements for recording, often involving customer notification.

7.4.17. System-wide Call Recording

System-wide Call Recording Rules allow administrators to define global policies for call recording that apply across the entire platform, independent of individual campaign settings. This is used to enforce broad compliance and quality standards.

How It Works

An administrator can set a system-level rule to, for example, record a certain percentage of all calls handled by the system. This global setting can act as a default or an override to ensure that a baseline level of recording is always maintained for quality and compliance purposes, even if specific campaigns have recording turned off.

Prerequisites

- User must have an "Administrator" role.

Configuration Steps

- This feature is enabled by the Exotel Support team upon request.

Use Cases

- **Blanket Quality Assurance:** An administrator sets a rule to record 25% of all inbound calls across all departments to ensure a consistent sample size for the quality team.
- **Compliance Mandate:** To meet a new regulatory requirement, an administrator configures the system to record 100% of all calls related to financial transactions, regardless of the campaign.

Benefits

- **Ensures Comprehensive Compliance:** Allows for the enforcement of global recording policies that cannot be bypassed at the campaign level.
- **Simplifies Quality Sampling:** Provides a simple method for ensuring a consistent and random sample of calls is available for quality review.

- **Centralized Control:** Manages a core compliance function from a single, system-wide setting.

Limitations

- A system-wide rule might record calls that are not strictly necessary, leading to increased data storage costs.

Storage and Cleanup

ACP Voice Log Cleanup (4.13.11+)

The platform provides a **voice log cleanup** capability for the Ameyo Communication Platform (ACP). Administrators can configure automated cleanup of voice log files on the call server to reclaim disk space after recordings have been safely archived or are no longer needed.

Per-Tenant VoiceLog Retention Overrides (4.13.48+)

Administrators can set **per-tenant retention periods** via the `server_preference_store`, overriding the global default. The minimum allowed retention is **3 months**. A nightly cleanup job automatically purges recordings that exceed each tenant's configured retention window.

Version History

Version	Enhancement	Release Notes
4.13.1	Initial feature documentation	–
4.13.11	ACP voice log cleanup capability	
4.13.48	Per-tenant VoiceLog retention overrides (min 3 months, nightly cleanup)	**Contact Center - Patch Release Notes - Version 4.13.48**

7.4.18. Quality Scoring/ QA Parameters

Quality Audits, or Call Scoring, is the process of evaluating agent interactions against a predefined set of QA Parameters. Supervisors or dedicated Analysts score recorded interactions to measure performance, ensure adherence to standards, and identify coaching opportunities.

How It Works

An Administrator first creates various QA parameters and then assigns them to various campaigns. A Supervisor or Analyst then selects a recorded interaction, listens to it, and fills out the scorecard. The system calculates a final score based on the assigned points. This feedback and score can then be shared with the agent.

Prerequisites

- A campaign must be active, and interactions must be recorded.
- Users must have supervisor or quality analyst permissions.

Configuration Steps

- **Create a Parameter:**
  - **Location:** `Administrator` > `QA Parameters`
  - **Action:**
    - Click on Create Parameter. In the popup,
    - Enter a name and description for the parameter
    - Click the checkbox to make the parameter mandatory to be filled by the Supervisor or Analyst.
    - Select the parameter type from the available values in the dropdown.
    - In the next sub-section, proceed to fill out the quality parameter details based on the parameter type selection.
    - Click on Add.
- **Enable a QA Parameter in a Campaign:**

    - **Location:** `Administrator` > `Process` > `[Process Name]` > `[Campaign Name]` > `QA Parameters`
    - **Action:** Select the desired parameter(s) from the list on the left (containing all available created parameters) and move them to the list on the right (parameters assigned to the campaign) by clicking on the right arrow and click on Apply.
- **Disable a QA Parameter in a Campaign:**
    - **Location:** `Administrator` > `Process` > `[Process Name]` > `[Campaign Name]` > `QA Parameters`
    - **Action:** Select the desired parameter(s) from the list on the right (parameters assigned to the campaign) and move them to the list on the left (containing all available created parameters) by clicking on the left arrow and click on Apply.
- **Perform an Audit:**
    - **Location:** `Supervisor` > `Manage` > `[Campaign Name]` > Call Details
    - **Action:** Filter the required recordings and click on the icon under the Scoring column, to access the scoring module and rate individual QA parameters assigned to the campaign. Starting from version 4.13, the QA scoring modal also displays the **related ticket ID** for context, and includes an embedded **VLA voice player** so the auditor can listen to the recording without leaving the scoring interface. Save the audit once complete.

Use Cases

- **Performance Reviews:** A manager uses average quality scores as a key metric in an agent's performance review.
- **Targeted Coaching:** A supervisor notices an agent consistently scores low on the "empathy" section and schedules a coaching session to focus on that skill.
- **Bonus Calculation:** An agent's monthly bonus is tied to achieving an average quality score of 95% or higher.

Benefits

- **Objective Performance Measurement:** Provides a standardized framework for evaluating agent performance, ensuring fairness and consistency.

- **Drives Continuous Improvement:** Identifies specific agent strengths and weaknesses, allowing for targeted coaching.
- **Aligns Agents with Business Goals:** Ensures that agents are focusing on the behaviors and outcomes that are most important to the business.

Limitations

- A poorly designed scorecard can drive unnatural agent behavior that may not correlate with actual customer satisfaction.
- The process can be time-consuming, requiring dedicated time for listening to calls and providing thoughtful feedback.

Version History

Version	Enhancement	Release Notes
4.13	Related ticket ID shown during QA scoring; VLA voice player embedded in QA modal	
4.13.1	Initial feature documentation	–

7.4.19. Mapping Policies

Overview

The Mapping Policies tab in the Administrator Console is used to define rules for associating users (agents) with their telephony details, such as their extension (phone number) and Call Context. The specific interface and configuration steps available in this tab depend entirely on the **User Mapping Policy** selected in the System Settings tab. All these policies are **Licensable**

Available Mapping Policies

IP Multiple User Call Leg Details Provider (Licensable)

- **Policy Type:** IP-based Multiple Extension Policy.
- **Function:** Allows the Administrator to assign **multiple extensions** (phone numbers) to a **single IP Address**.
- **Configuration:**
    1. Click the **Add button (+)** to create a new mapping.
    2. Enter the **IP Address**.
    3. Select the **Call Context**.
    4. Enter the **Phone number** (extension).
    5. Select the **Sequence number** for this extension.
    6. Click the **Save button** (disk) to complete the mapping.

User ID Mapped Call Leg Details Provider (Licensable)

- **Policy Type:** User-to-Default-Extension Mapping Policy.
- **Function:** Enables the Administrator to map users to their default extensions and manage multiple extensions directly in a tabular format.
- **Configuration:**
    - **Default Extension Mapping:** The Administrator selects the default **Call Context** and provides the default **Phone Number (extension)** for each user directly in the

table.
    - **Multiple Extensions:** If a user requires more extensions, the Administrator clicks the **plus icon (+)** next to the phone number to define and manage their multiple extensions.
- **Agent Logon Behavior:** After this configuration, when an agent logs in and selects a campaign with the defined call context, they will be **automatically logged on with the specified default extension** and will not be prompted to select an extension.
- **Toolbar Integration:** Users logged in via Ameyo Toolbar Integration in a third-party application can use **up to three extensions simultaneously** for call types such as inbound.call.dial, outbound.auto.dial, transferred.to.campaign.dial, and outbound.callback.dial.

User ID Based Call Leg Details Provider (Licensable)

- **Policy Type:** User-to-Voice-Resource Mapping Policy.
- **Function:** This policy is used in environments with multiple voice resources and is the **preferred policy for WebRTC implementation**. It allows mapping specific users to specific voice resources.
- **Configuration:** The interface uses a Left Section (Source) and Right Section (Destination) for assignment:
    - **Mapping Users:** Select the desired Voice Resource in the **Right Section's** "Agent Mapped To" drop-down menu. In the **Left Section**, select the agents you wish to map and click the **Forward Arrow icon** (arrow pointing right) to move and map them to the destination Voice Resource.
    - **Unassigning Users:** To unassign, select the Voice Resource in the **Right Section**, select the users to unassign, and click the **Backward Arrow icon** (arrow pointing left) to move them back to "Unmapped" or another source.

Manual User Call Leg Details Provider (Licensable)

- **Policy Type:** Agent Manual Selection Policy.
- **Function:** This policy requires **no action by the Administrator** in the configuration tab.
- **Agent Behavior:** Agents are responsible for **manually selecting their extensions** upon logon for every session.

IP User Call Leg Details Provider (Licensable)

- **Policy Type:** IP-based Single Extension Policy.
- **Function:** Allows the Administrator to define a **single extension mapping** for a specific IP Address.
- **Configuration:**
    1. Click the **Add button (+)**.
    2. Enter the **IP Address**.
    3. Select the **Call Context**.
    4. Enter the **Phone number** (extension).
    5. Click the **Save button** (disk) to complete the mapping.

General Configuration Actions

- **Creation:** New mappings are created using the **Add button (+)**.
- **Deletion:** Existing mappings can be deleted by selecting the entry and clicking the **Delete button** (trash can).
- **Editing:** Phone numbers/extensions can often be edited directly within the Mapping Policy table.
- **Single Extension Usage Limitation:** Multiple extension policies do not work simultaneously across multiple extensions for call types like click.to.call.dial and outbound.auto.preview.dialing.

7.4.20. Report Scheduling & Exporting

Overview

This feature provides supervisors and administrators with the flexibility to export report data for offline analysis and to schedule reports to be run automatically at regular intervals. This ensures that stakeholders receive timely performance data without manual intervention.

How It Works

- **Exporting:** From any report page, a user can click an "Export" button. This will download the data currently displayed in the report, typically in a CSV or Excel format.
- **Scheduling:** Users can set up a schedule for a specific report to be run automatically. The system will generate the report at the specified time and can be configured to email it to a predefined list of recipients.

Prerequisites

- User must have permissions to access the `Reports` module.

Configuration Steps

1. **Exporting a Report (Supervisor):**
    - **Location:** `Supervisor` > `Reports` > `[Select any report]`
    - **Action:** After generating a report, click the **Export** button to download the data.
2. **Scheduling a Report (Administrator):**
    - **Location:** `Adminsitrator` > `Reports` > `Scheduler` > `All Schedules`
    - **Action:**
        1. The exisitng schedules will be visible in aplhabetical order, with various details such as created date and time and next execution date and time.
        2. Click on "Add"
        3. Proceed to provide details such as schedule name, any description and selecting the output format.

4. Select the schedule start and end times. End time can be a specific date and time, never ending or ending after a certain number of executions.
5. Select the frequency amongst-
    1. Hourly- enter the number of hours after which the report should repeat execution.
    2. Daily- enter the number of days after which the report should repeat execution and the time of day when the report should be executed.
    3. Weekly- select the days of the week on which the report should be executed, by selecting the checkboxes for the respective days, and the time of the day at which the report should be executed, across the selected day(s).
    4. Monthly- select the day based or week based time frame.
        1. For day based schedule frame, enter the day date of the month on which the report should run and the frequency in number of months after which the report should repeat execution.
        2. For week based schedule frame, select the "First/ Second/ Third/ Fourth" instance of the day of the week on which the report should run and the frequncy in number of months after which the report should repeat execution.
        3. Next enter the time of day at which the report should run.
    5. Yearly- select the day based or week based time frame.
        1. For day based schedule frame, enter the day and month date on which the report should run.
        2. For week based schedule frame, select the "First/ Second/ Third/ Fourth" instance of the day of the week and the month of the year, on which the report should run.
        3. Next enter the time of day at which the report should run.
    6. Cron- select from the available list.
6. Select the desired Report to schedule and other usual parameters.
7. Select the report delivery profile from the p[redefined list of email or FTP configurations.

Use Cases

- **Offline Analysis:** A data analyst exports a detailed call report to import it into a business intelligence tool for advanced analysis.
- **Daily Performance Summary:** A manager schedules the "Agent Performance Report" to be emailed to all team leaders every morning.
- **Weekly Stakeholder Updates:** A supervisor schedules a weekly queue performance report to be sent to department heads.

Benefits

- **Enables Deeper Analysis:** Exporting data allows for unlimited offline analysis and integration with other business intelligence platforms.
- **Automates Information Delivery:** Report scheduling ensures that key stakeholders automatically receive performance data on a consistent basis.
- **Saves Administrative Time:** Eliminates the need for supervisors to manually run and distribute the same reports every day or week.

Limitations

- The scheduling functionality, if not found in the manual, may not be a standard feature.

Changelog

Release Number	Change Description
4.13.1	Initial feature documentation.

8. Agent Desktop / Console

8.1. Workbench

8.1.1. Unified Agent Desktop

Overview

The Unified Agent Desktop is the agent's primary interface, also referred to as the Agent Console. It provides a single, consolidated workspace for handling all customer interactions across every channel (voice, email, chat, social media). It is designed to streamline workflows and provide agents with all the information they need in one place.

How It Works

When an agent logs in, they are presented with the agent console. This interface includes call/interaction controls, a customer information panel, a communication window for the active channel, and a status management menu. This unified view allows agents to handle omnichannel interactions without switching between different applications.

Depending on your deployment and role setup, the agent may first confirm **working mode** or **campaign / queue** selection before the main workbench appears. **Voice**, **chat**, **email**, and other enabled channels then surface in the same application shell—typically with channel-specific controls and customer context side by side. Optional panels (for example **knowledge base**, **transfer** or **conference** flows, or **audio device checks** when using browser-based voice) open as in-app modals or sections without leaving the desktop.

Prerequisites

- The user must have an "Agent" role.

Configuration Steps

- **Accessing the Desktop (Agent):** This is the default interface for agents and is not configurable by the agent themselves.
  - **Location:** Agent > Login Screen
  - **Action:** Log in with valid agent credentials. The system will automatically load the Unified Agent Desktop (Agent Console).

Use Cases

- **Omnichannel Support:** An agent handles an inbound call, and during the wrap-up time, they respond to an email and a chat session all from the same screen.
- **Informed Conversations:** An agent receives a call, and the customer's entire interaction history across all channels automatically pops up on their screen.

Benefits

- **Increased Agent Efficiency:** Eliminates the need to switch between multiple applications, reducing clicks and saving time on every interaction.
- **Improved Customer Experience:** Provides agents with a complete view of the customer journey, leading to more personalized conversations.
- **Reduced Training Time:** A single, intuitive interface for all tasks makes it easier and faster to onboard new agents.

Limitations

- The layout and available widgets may be fixed by the administrator, offering limited personalization options for individual agents.

Related topics

- **Omni-channel Campaign Configuration (6X Voice Process)** – How voice and digital channels are set up for agents on blended or omnichannel campaigns.
- **Voice Communication with Customer** – Voice-specific agent actions during a live call.
- **Voice Telephony Panel** – Telephony controls and indicators in the agent experience.
- **Agent Toolbar (CRM-Integrated Mode)** – Lightweight or CRM-embedded agent experience when agents work primarily from an external CRM shell.

8.1.2. Agent Toolbar (CRM-Integrated Mode)

The Agent Toolbar feature provides an **alternate method for agents to login and access** the core functions of the Ameyo system, integrating them directly into a third-party Customer Relationship Management (CRM) application. In this mode, the CRM serves as the primary agent workspace, eliminating the need for the agent to use the native Ameyo console (Unified Agent Desktop, or UAD) [User context]. This approach allows for a unified desktop experience by embedding essential contact center controls directly within the CRM interface.

This solution enables an agent to log in and conduct their work entirely through their configured CRM interface.

Benefits

- **Unified Agent Experience:** By embedding core telephony functions directly into the CRM, agents eliminate the need to switch between multiple applications (UAD and CRM), promoting a single, consistent desktop environment.
- **Enhanced Data Integrity and Governance:** The capacity to restrict disposition to the CRM ensures post-call activities, such as note-taking and customer status updates, are rigorously performed within the designated system of record.
- **Streamlined Workflow:** The availability of one-level disposition significantly simplifies the call wrap-up process for the agent.
- **Granular Security Control:** Administrators maintain precise control over the agent's interaction tools by enabling restrictions on core actions, including initiating call transfers, conferences, and manual dialing.
- **Flexible Integration:** The solution supports seamless integration with a wide array of existing third-party CRMs using a generic connector with an SDK, or via standard pre-built connectors.

Use Cases

- **CRM-Mandated Workspaces:** This mode is essential for contact centers where adherence to the CRM (**Zoho, Zendesk, Salesforce, Microsoft Dynamics, Freshsales, Freshdesk**) as the primary workspace is a strict operational requirement.

- **Enforcing Compliance Workflows:** Employed in environments necessitating compulsory adherence to after-call work policies, leveraging the CRM's native workflow to guarantee data accuracy and compliance during call disposition.
- **Simplified Call Handling:** Ideal for teams that require a focused, distraction-free environment, delivering core call controls directly to the agent's primary application (the CRM) as an alternative to the full UAD experience
- **In-House CRM CTI:** Integrating core contact center functions into a proprietary or generic web-based CRM using the provided **SDK/APIs.**
- **Optimized Sales/Support Dialing:** Utilizing the **Click-to-Dial , Dispose etc** functions directly from a customer or lead list in the CRM.

Prerequisites

Type of Integration	Prerequisites & Configuration
Standard Connectors	**CRM Integration Activation:** Established CRMs (Zoho, Zendesk, Salesforce, etc.) must be authorized and enabled for integration. **User Mapping:** User IDs must be consistent between Ameyo and the CRM for Single Sign-On (SSO).
Generic Web Toolbar (SDK/API)	**Licensing & Professional Services:** A licensable feature requiring configuration by Professional Services. **Technical Requirements:** The third-party CRM must be web-based, support an **iframe** for embedding, and include a container with the ID ameyoIframeDiv. **User Mapping:** User IDs must be consistent between Ameyo and the CRM for Single Sign-On (SSO). **Authentication Endpoint:** For CRM-backed SSO, the CRM must expose a **POST /login_logout endpoint** to handle session commands.

Supervisor Access (4.13.31+)

Starting from version 4.13.31, **Supervisors** can log in to the Agent Toolbar to perform basic call operations (make/receive calls, transfer, etc.). This allows supervisors in CRM-integrated environments to use the same toolbar for occasional call handling without switching to the full Supervisor console.

Transfer Enhancements (4.13.38+)

Starting from version 4.13.38, the **transfer dropdowns** (Transfer to Queue, Transfer to Campaign) in the toolbar show **live counts** of available agents and agents currently on-call in each target, helping the transferring agent or supervisor pick the best destination.

Inactivity-Based Auto-Logout (4.13.40+)

Starting from version 4.13.40, an **inactivity-based auto-logout** can be configured for toolbar sessions. If the agent does not interact with the toolbar for a configured period, the session is terminated automatically, freeing up the license seat and improving security.

Cache and Version Management

- **Auto Cache Invalidation (4.13.43+):** Toolbar assets cached in the browser are automatically invalidated when the platform is upgraded, eliminating the need for agents to manually clear their cache after a 4.x upgrade.
- **Automatic Version Updates on RPM Install (4.13.44+):** When a new platform RPM is installed, the toolbar version is updated automatically. Additionally, a **server-side version check** runs on login to ensure the agent is always using the latest compatible toolbar build.

Version History

Version	Enhancement	Release Notes
4.13.31	Supervisors can log in to toolbar for basic calls	**Contact Center - Patch Release Notes - Version 4.13.31**
4.13.38	Transfer dropdowns show live available/on-call agent counts	**Contact Center - Patch Release Notes - Version 4.13.38**
4.13.40	Inactivity-based auto-logout for toolbars	**Contact Center - Patch Release Notes - Version 4.13.40**
4.13.43	Auto cache invalidation on 4.x upgrades	**Contact Center - Patch Release Notes - Version 4.13.43**
4.13.44	Automatic version updates on RPM install; server-side version check on login	**Contact Center - Patch Release Notes - Version 4.13.44**

8.1.3. Call Details

Overview

The **Call Details** feature is located in the Agent Console and serves as the agent's personal hub for managing upcoming customer **Callbacks** and reviewing their **Call History** (past interactions). This feature helps agents maintain an organized workflow and ensures no follow-up is missed.

How it works

Callbacks Sub-Tab

This tab shows all customer callbacks that are currently scheduled specifically for the logged-in agent across all assigned campaigns.

- **Dialing:** The agent can click to dial the customer directly from the list. The system then redirects to the Agent Workbench and removes the callback entry.
- **Modification:** Agents can reschedule or delete a callback, but both actions require providing a **mandatory reason** for the change.
- **Filtering:** Agents can apply filters by time range (Today, Tomorrow, Custom Range), phone number attributes, and Unique Identifier (if number masking is enabled).

Call History Sub-Tab

This tab displays a comprehensive history of calls made or received by the agent.

- **Voicelog Access:** The agent can **Listen to Voicelogs** for **connected calls** only. A media player pop-up allows control (download, volume, pause).
- **Follow-up:** Agents can use the **Click-to-Dial (CTD)** icon next to a number in the history to initiate a manual call or **View Call Notes** left during the original interaction.
- **Filtering:** Agents can filter the list by Campaign Name, Disposition Class/Code, Time Range, and Attribute-Based columns.

Prerequisites

- The Agent must be **logged into the Agent Console**.
- The Call Details feature must be **enabled** by the administrator for the agent's user role or process.
- **Voicelog Listening** requires the call to be a **connected call**.

Benefits

- **Improved Customer Satisfaction:** By reviewing **Call History** and notes, agents prevent customers from having to repeat themselves, creating a seamless experience.
- **Personal Performance Improvement:** Agents can **Listen to Voicelogs** of their own calls for self-evaluation and aligning their approach with training standards.
- **Enhanced Organization:** The **Callbacks** feature ensures agents are organized, take ownership of follow-up tasks, and manage their time efficiently.

Use Cases

- **Post-Call Self-Review:** An agent listens to a voicelog from a complex call they just finished to identify what they handled well and what they could improve on for the next time.
- **Handling Customer Call-Backs:** A customer calls back and references a previous interaction; the agent quickly filters their **Call History** by the customer's number, views the **Disposition Class/Code**, and checks **Call Notes** to get instant context.
- **Managing Follow-Up Queue:** An agent uses the **Callbacks** tab to see all high-priority follow-up calls due that day, ensuring they meet promised customer contact times.

8.1.4. User Login & Single Sign-On (SSO)

The Login Page provides the gateway to the platform's web-based interface, offering privileges to manage a single tenant, its campaigns, users, and call managers. The page supports standard credential-based login as well as enhanced security and convenience features like Single Sign-On (SSO) via SAML and Google integration.

How It Works

The Login Page supports multiple methods for accessing the console:

Login Method	How It Works	Nature
Normal Login	The user enters their platform **User ID** and **Password**, then clicks **Login**. Password strength and expiry follow your **password policies** (see **Password Policy**). For LDAP-authenticated environments, a configurable timeout (default 5 seconds) applies to the authentication request.	Standard
Login with SAML	The user clicks **SAML** and is sent to the organization's **Identity Provider (IdP)**. After corporate sign-in, the IdP and the platform exchange trust using **SAML 2.0** assertions. Common IdP examples customers use include **Microsoft AD FS**, **Okta**, **Keycloak**, and other SAML-capable providers—configuration is still **SAML**, not a separate product-specific "Okta button."	Licensable (SSO)
Login with Google	The user clicks **Google** (or **G - Google** on some builds) and signs in with **Google Workspace** (formerly G Suite). The tenant must allow your Google domain so only authorized staff can complete login.	Licensable (SSO)

Public cloud note (capacity planning): On **Ameyo public cloud**, SAML logins are documented with a practical ceiling on **consecutive** SAML sessions (on the order of **hundreds**). For **very high** concurrent interactive logins, operations teams may prefer **OAuth-**

based authentication paths documented for cloud—confirm current limits with your Exotel or platform account team. This does **not** add a third branded button on the classic web login; it is an **architecture / scale** choice for cloud deployments.

Use Cases

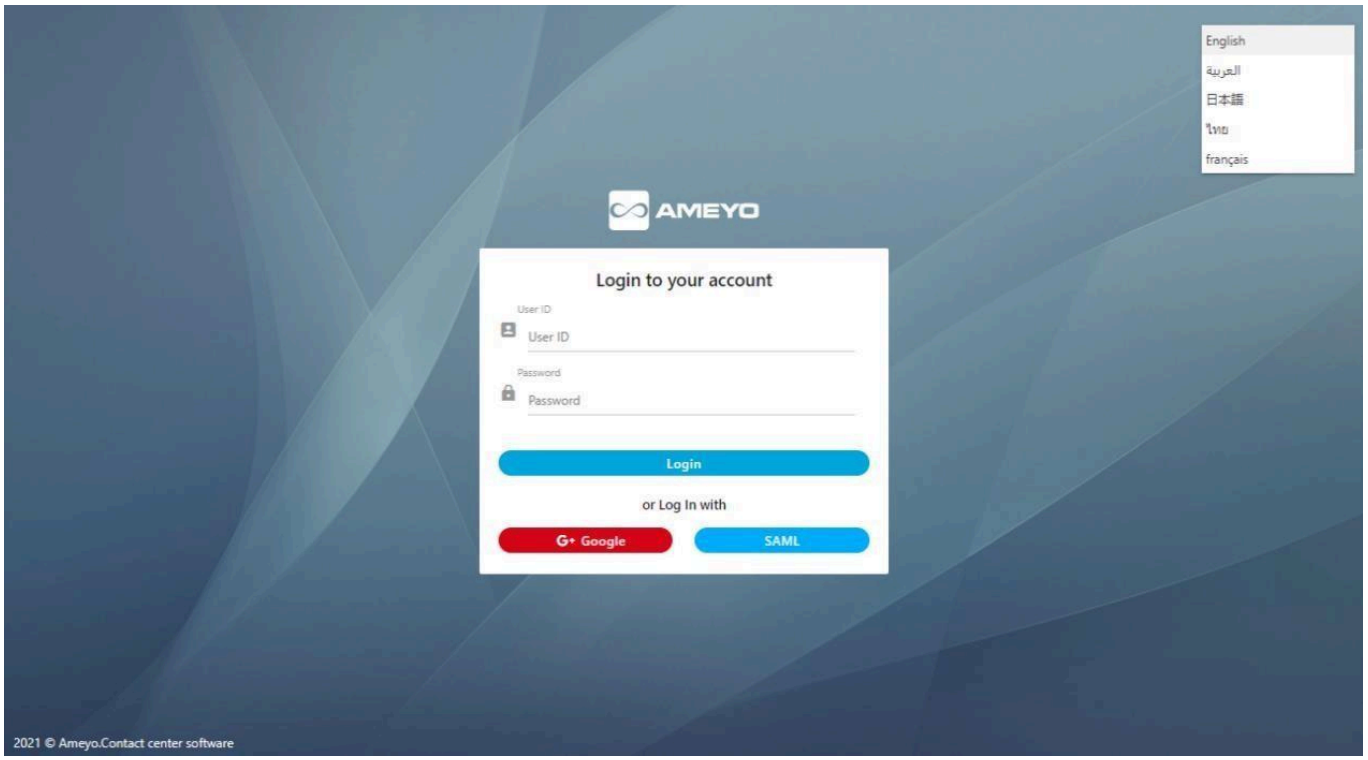


Figure: Change Language on Login Screen

- **Enterprise Security:** A large corporation implements SSO (SAML) to enforce its strict corporate password policies and multi-factor authentication across all applications, including the contact center platform.
- **Streamlined User Access:** An agent logs into their company computer and can immediately access the agent console (or another platform) via SSO without needing to enter their credentials a second time.
- **Centralized User Management:** When an employee leaves the company, an IT administrator simply deactivates their single corporate account in the IDP, which automatically revokes their access to the platform via SAML.

Benefits

- **Improved Security:** Centralizes user authentication, making it easier for the business to enforce strong corporate password policies and manage access centrally.

- **Enhanced User Experience:** Simplifies the login process for users (Administrators and Agents), saving time and reducing the frustration of managing multiple passwords.
- **Reduced Administrative Overhead:** Streamlines the user onboarding and offboarding process by linking access control to a single corporate identity.

Language Selection

The Login Page also allows the user to set their preferred language before logging in.

1. The user selects the desired language from the **drop-down menu** provided at the top right corner of the screen.
2. By default, **English** is selected as the platform's language.
3. Available languages include: **English, French, Thai, Arabic, Japanese, Deutsch, and Turkish.**

Limitations

- **Identity Provider Outage:** If the central Identity Provider (IDP) used for SAML or Google login experiences an outage, users will be unable to log in to the platform using the SSO method.
- **Licensable Features:** The SAML and Google login options are Licensable features, requiring specific configuration and agreement.

LDAP Authentication

For deployments using **LDAP** (Active Directory or other LDAP directories) for credential verification, the platform performs an LDAP bind on each login attempt. Starting from version 4.13.9, a **configurable authentication timeout** (default **5 seconds**) is applied to LDAP bind requests, preventing slow or unresponsive directory servers from blocking login flows indefinitely. Improved logging captures LDAP authentication failures and timeout events for easier troubleshooting.

Session behaviour (after login)

Once authentication succeeds, the platform keeps a **session** open for your user until you **log out**, the session **expires** from inactivity, or an administrator or policy ends it (for example when **another login** is not allowed and you choose to take over an existing seat). If you see a

force login or **maximum sessions** style message, follow the on-screen options or contact your administrator—limits are applied per deployment.

Related topics

- **Password Policy** – Local password rules (simple, complex, enforce, substring/identity policy) used with **normal login** and password changes.
- **Logout from Ameyo** – Steps for agents to leave the application cleanly.
- **Administrator Login** – Console login for tenant administrators.
- **Supervisor Login** – Supervisor web login.
- **Login - Logout** – Reporting view for login and logout activity.

Version History

Version	Enhancement	Release Notes
4.13.9	LDAP authentication timeout (default 5 s) with improved failure logging	

8.1.4.1. Configuring SAML SSO with ECC via any IDP

This guide outlines the steps to enable Secure Single Sign-On (SSO) using SAML with Ameyo Customer Engagement Platform for both internal employee access and external customer integrations.

Prerequisites

- Administrative access to Ameyo server environment
- Access to your Identity Provider (IdP), such as Google Workspace or Salesforce
- Necessary certificates and metadata from the IdP

Steps to Configure SAML SSO

1. Backend Configuration

- Access the server hosting Ameyo.
- Update the configuration files or database entries to enable SAML authentication.
    - Modify the relevant configuration tables, typically involving setting parameters for SSO enablement, Entity ID, and SSO URL.
- Import the IdP metadata XML file into Ameyo to establish trust.

2. SAML Settings in Ameyo

- Configure the following parameters:
    - IdP SSO URL
    - IdP Entity ID
    - X.509 Certificate details for signing assertions
- Set the Assertion Consumer Service (ACS) URL, which should be provided by Ameyo.

3. Configure Identity Provider

- In your IdP (e.g., Google, Salesforce), specify the ACS URL from Ameyo.
- Upload the Service Provider metadata (if applicable).
- Define user attributes and roles to be sent in SAML assertions.

4. Application Settings and Domain Configuration

- Define the domain URLs for SSO.
- Set the default user attribute mappings and attribute transformation rules.
- Enable the SAML SSO feature in Ameyo's admin interface.

5. Test and Validate

- Restart the Ameyo server to apply configuration changes.
- Initiate a login flow to verify SSO integration.
- Confirm users can authenticate via the IdP and access Ameyo seamlessly.

Additional Notes

- Ensure SSL/TLS is enabled for all endpoints involved in SSO.
- Regularly update certificates and metadata to prevent authentication disruptions.
- Consult Ameyo's official documentation for specific configuration commands and database modification queries if custom scripting is needed.

Supported Identity Providers

The following IdPs have been validated for SAML SSO integration with the contact center platform:

- **Okta** – Validated in version 4.13.3. See also the dedicated guide: **Integrating SAML SSO with Keycloak IdP for Your Application** for Keycloak-specific steps.
- **Microsoft AD FS**
- **Google Workspace**
- **Keycloak** – Validated in version 4.13.27.
- Any SAML 2.0-compliant IdP following the configuration steps above.

Troubleshooting Tips

- Check logs for errors related to SAML assertions or metadata mismatch.
- Verify attribute mappings between IdP and Ameyo.
- Confirm that the server clock is synchronized for proper timestamp validation.

Version History

Version	Enhancement	Release Notes
4.13.3	SAML SSO via Okta validated and documented	

8.1.4.2. Integrating SAML SSO with Keycloak IdP for Your Application

This document provides comprehensive guidance on integrating SAML Single Sign-On (SSO) with Keycloak Identity Provider (IdP) for your application. Since your system is already a SAML client integrated with various IdPs like ADFS and OKTA, no code or design changes are expected.

- Support SAML authentication via Keycloak IdP.
- Leverage existing SAML client capabilities without additional code changes.

1. Keycloak Configuration Steps

1.1 Install Keycloak

- Download Keycloak from the official archive: **Getting Started Zip**.
- Follow installation instructions tailored for your environment: **Server Administration Guide**.

1.2 Create a SAML Client (SSO Application) in Keycloak

- Log into the Keycloak Admin Console.
- Navigate to **Clients** and click **Create**.
- Set the **Client ID** as your application's SAML service provider identifier.
- Choose **SAML** as the client protocol.
- Configure the **Assertion Consumer Service (ACS) URL** to point to your application server's SAML endpoint.
- Configure other settings such as **Name ID Format**, **Signature Algorithm**, and **Valid Redirect URIs** according to your application's requirements.
- Download the **IdP Metadata XML** from Keycloak for use in your application server configuration.

1.3 Optional: Define User Attributes

- Map user attributes and roles to be sent in SAML assertions as needed.

2. Application Server Configuration Steps

- Use your application's existing SAML client configuration mechanism.
- Replace or add a new SAML connection using the Keycloak IdP metadata.
- Update the following as per Keycloak's metadata:
  - Entity ID
  - SSO URL
  - X.509 Certificate
  - Attribute mappings
- Restart the application server to apply changes.

3. Verification and Testing

- Initiate login flow through your application.
- Confirm users are redirected to Keycloak for authentication.
- Verify the SAML response and successful login into your application.

4. Additional Resources (Internal)

- **Configure SAML SSO with OKTA:**
  https://oldsites.ameyo.net/view/engineering/configure-saml-sso-via-okta.html
- **Configure SAML SSO with Any IdP:**
  https://oldsites.ameyo.net/view/engineering/configure-saml-sso-via-any-idp.html
- **Keycloak Official Documentation – Server Admin:**
  https://www.keycloak.org/getting-started/getting-started-zip
  https://www.keycloak.org/docs/latest/server_admin/

Version History

Version	Enhancement	Release Notes
4.13.27	Keycloak validated as a SAML IdP — no application code changes required	

8.1.5. Agent Productivity

Overview

The Agent Self-Monitoring App is a custom platform designed to display an agent's individual productivity and session data related to login duration, calls handled, and time spent on various breaks. It provides agents with a consolidated, system-level view of their performance for self-assessment.

- **Scope:** The data displayed is at the **system level**, irrespective of the campaign (Inbound or Outbound) selected by the user. The app is currently for **voice purpose** only.

How It Works

The app is divided into three primary sections, each displaying data from specific sources with unique refresh and reset properties.

Section	Data Type Displayed	Data Source & Reset Logic	UI Refresh Time
1. Login Stats	Time the agent was logged in.	From **JS stats**. Data is available for the **past 12 hours** and **does not reset** on system restart.	5 minutes
2. Call Stats	Total calls handled (success or failed), irrespective of talk time.	From **System stats** (specifically AgentCallStatsT2D2). Data is available for the **past 12 hours**. **Data resets to 0** on server restart and at **23:59:59**.	5 minutes
3. Break Stats	Time spent on different break types (e.g., Meeting, Snacks).	From **JS stats**. Data is available for the **past 12 hours** and **does not reset** on system restart.	5 minute

Deployment Note

- **File Extension:** Before uploading the app on the server (up to build 4.3), the app's extension must be renamed from **.aax** to **.aaex**.
- **User Mapping: No slot mapping is available for Voice-Admin**. The Voice-Admin role is not shown in the list while uploading the app.

Use Cases

- **Self-Correction:** An agent can review their call stats and break stats to ensure they are meeting individual productivity targets and minimizing unauthorized break time.
- **Shift Review:** An agent can use the Login Stats to confirm the total time they were actively logged into the system for accurate shift time tracking.
- **Supervisor Check:** Supervisors can direct agents to their self-monitoring app for real-time feedback on their current shift performance.

Benefits

- **Real-Time Feedback:** Provides agents with near-real-time data (5-minute refresh) on their core metrics.
- **Empowered Management:** Enables agents to self-monitor and proactively manage their adherence and productivity goals.

Limitations

- **Group Manager Exclusion:** The app is **Not working for Group Manager** user roles.
- **Call Stats Reset: Calling stats reset** after every server restart, but the **Login/Break stats do not reset**.
- **Voice Only:** The app is currently purely for **voice purpose**.

Related Agent Productivity Features

These features are core to the Agent Console and support overall productivity management:

1. Agent Status and Availability Control

- **Overview:** Agents control their availability and status via a simple drop-down menu and campaign toggle switches.
- **How It Works:** After login, the agent's initial status is **"Just Logged In (Unavailable)"**. They must manually change to **"Available"** to receive work. They can select configured **Break Reasons** (e.g., "Lunch," "Training") for non-productive time. Agents also use **Auto-mode (Auto-Call On/Off)** switches to control active campaign connectivity.
- **Benefits:** Ensures accurate tracking of productive vs. non-productive time and allows the agent to comply with multi-channel shift requirements.

2. Last Performed Activity Tracking

- **Overview:** A feature that tracks the time elapsed since the agent's last meaningful activity within their session.
- **How It Works:** Agents can hover over **"Last activity since"** in the Account Menu to see the total time elapsed. Activities considered include: changing status (all breaks), picking up a chat/ticket/call, dispositioning a chat/ticket/call, or putting a call on hold.
- **Benefits:** Helps both the agent and supervisor ensure continuous activity during shifts.
- **Limitations:** This feature is only available for the **WebApp application** and not for toolbars. The activity time count **resets to 0 on page reload**.

3. WebRTC Telephony Health Check

- **Overview:** A simple indicator to confirm the functional status of the agent's voice connection.
- **How It Works:** An icon in the top-right corner shows the **WebRtc Troubleshooter**. It should turn **"Green"** (registered) shortly after logging in. If it remains **"Red,"** the WebRTC is not registered, and the agent cannot make or receive calls.
- **Benefits:** Allows agents to self-diagnose and proactively report connectivity issues to minimize call downtime.

8.1.6. Pause/Resume Call

Overview

The Pause/Resume Recording feature allows an agent to temporarily stop and then restart the recording of a live call and/or their screen. This functionality is critical for protecting sensitive customer information, such as credit card details, and is a key component of PCI-DSS compliance.

How It Works

While on a live, recorded call, the agent can click a "Pause Recording" button on their custom app / CRM. The system stops capturing audio. After the sensitive information has been exchanged, the agent clicks "Resume Recording," and the system continues recording the interaction. The final recording file will exclude the paused segment.

Prerequisites

- The campaign or system must be configured for call recording.
- The agent's role must have the permission to pause and resume recordings.

Configuration Steps

- Need development / custom module to be implemented from Professional Services team

Use Cases

- **PCI Compliance:** An agent pauses the recording while a customer reads their credit card number over the phone.
- **Protecting PII:** An agent pauses the recording when a customer needs to provide a social security number or other sensitive Personally Identifiable Information.
- **Healthcare Privacy (HIPAA):** An agent might pause a recording when discussing sensitive patient information that should not be stored.

Benefits

- **Ensures Data Security and Compliance:** Protects sensitive customer data from being stored in recordings, helping organizations meet strict compliance standards.
- **Builds Customer Trust:** Reassuring customers that their sensitive information is not being recorded can increase their confidence.
- **Reduces Risk:** Minimizes the risk of data breaches by preventing the storage of valuable financial or personal information.

Limitations

- The process relies on the agent to remember to pause and resume the recording at the appropriate times.

8.1.7. Disposition

Overview

Call Disposition is a mandatory feature that ensures agents classify the outcome of every customer interaction (call, chat, or email). It operates on a **two-level hierarchy** (**Disposition Class** and **Disposition Code**) to provide structured data for operational reporting, process analysis, and quality assurance.

The Administrator defines the structure and assigns it to specific campaigns.

How It Works

The system requires an Administrator to define the logical groupings (Classes) and the specific outcomes (Codes), which are then made available to the agents via a **Disposition Plan**.

The Two-Level Hierarchy

Disposition Class (Level 1):

1. **Definition:** A broad, logical category for grouping similar call outcomes (e.g., "Sales Outcomes," "Technical Support," "Not Connected").
2. **Purpose:** To organize codes into manageable buckets for the agent interface and high-level reporting.
3. **Creation:** Created by the Admin under **System Configuration** > **Dispositions** tab, and marked as **"User Defined."**

Disposition Code (Level 2):

1. **Definition:** The specific reason or final result of the interaction. It is nested within a Disposition Class.
2. **Purpose:** To capture the precise, reportable outcome (e.g., "Sale Closed," "Follow-up Scheduled," "Busy Number"). This is the key data point.

3. **Creation:** Created by the Admin by selecting a **Disposition Class** and adding the new code to it.

Assignment to Campaign

The Admin must create a **Disposition Plan** that bundles the necessary Codes and Classes, and then assign that Plan to a specific **Voice Campaign** (e.g., Inbound, Outbound). This action populates the agent's Telephony Panel with the correct disposition options post-call.

Use Cases

- **Performance Reporting:** Used to calculate conversion rates (e.g., how many calls result in "Sale Closed") or failed attempts (e.g., "Line Busy").
- **Agent Process Compliance:** Ensures agents adhere to the required post-call wrap-up process by selecting an outcome before moving to the next call.
- **Automated Action Triggers:** Certain codes can be configured to trigger subsequent actions, such as removing a number from an outbound dialer list ("Do Not Call") or scheduling a follow-up.

Benefits

- **Standardized Data:** Ensures all agents use a consistent, defined set of codes to classify outcomes, eliminating ambiguity in reporting.
- **Actionable Reporting:** Provides the structured data necessary for Supervisors and Analysts to drill down into operational efficiency and business results.
- **Agent Accountability:** Forces a necessary step at the end of every interaction to complete the customer record.

Limitations

- **Two-Level Default:** The default configuration is a **Two-Level Disposition** (Class then Code). Changing this to a single-level disposition requires back-end configuration by Support Team.

8.1.8. Manual Call

Overview

Manual Call is a feature that allows agents to place an outbound call by manually dialing a phone number that is not part of an automated campaign lead list. This is essential for one-off calls, follow-ups, or calling numbers provided by a customer during an interaction.

How It Works

From their console, the agent accesses a dial pad. They can type or paste in the phone number they wish to call and initiate the call. The system treats this as a manual outbound call, which can still be tracked, recorded, and dispositioned just like a campaign call, depending on the system's configuration.

Prerequisites

- The agent's user role must have permissions to make manual calls.

Configuration Steps

- **Making a Manual Call (Agent):**
  - **Location:** Agent > Agent Console > Call Control Panel
  - **Action:**
    1. Click on the **Manual Call** icon (a dial pad symbol).
    2. The dial pad will appear. Enter the phone number you wish to dial.
    3. Click the call button to initiate the outbound call.

Use Cases

- **Customer Callbacks:** An agent manually dials a customer's number to provide an update on a support ticket.
- **Calling a New Number:** A customer provides an alternate contact number during a chat session, and the agent uses a manual call to contact them.

- **Outbound Follow-up:** A sales agent needs to call a vendor or a partner whose number is not in the CRM.

Benefits

- **Increased Agent Flexibility:** Empowers agents to make necessary outbound calls on the fly, without being restricted to campaign lists.
- **Improved Responsiveness:** Allows agents to immediately act on new information, such as calling a customer back at a number they just provided.
- **Comprehensive Tracking:** Even though the calls are manual, they are still logged and recorded by the system.

Limitations

- Unrestricted access to manual dialing could potentially be misused, so permissions should be managed carefully.

8.1.9. WebRtc Troubleshooter

The WebRTC Troubleshooter is an agent-facing diagnostic tool designed to help users monitor and troubleshoot their softphone connectivity and performance. It provides immediate access to connection status and detailed network statistics to quickly identify voice issues without requiring administrative assistance for initial diagnosis.

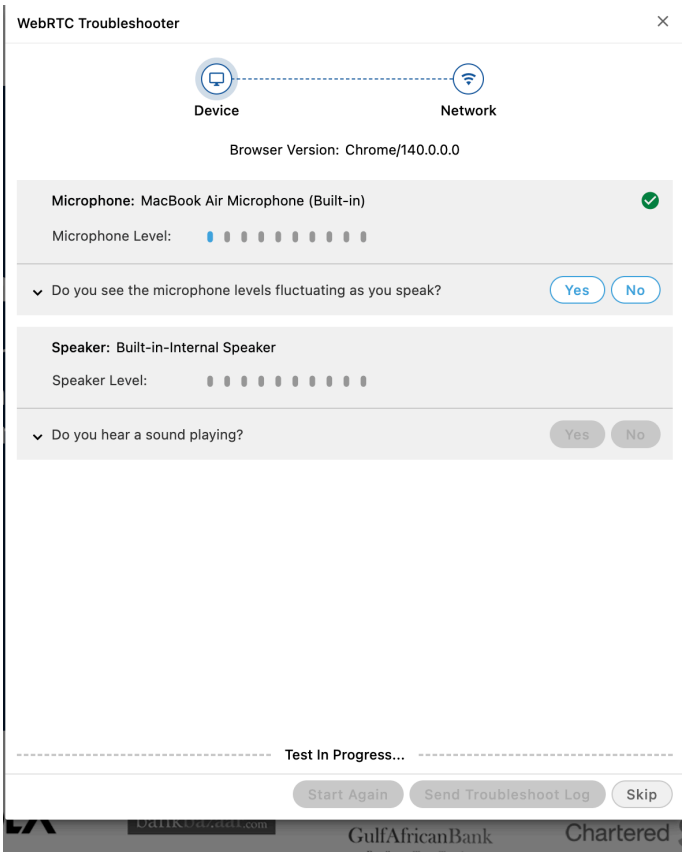
How It Works

The tool is accessed through phone icon on the Agent Console.

Access Flow

1. **Initiate Access:** The agent clicks the **Phone Icon** on the Agent Console to open the main telephony pop-up menu.
2. **WebRTC Troubleshooter:** To access the full diagnostic tool, the agent clicks the **Troubleshooter Icon** within the pop-up. This opens the dedicated WebRTC Troubleshooter interface for deeper analysis.
3. **Connectivity Stats:** To view real-time network metrics, the agent clicks the **Network Icon** within the pop-up. This displays the detailed Connectivity Stats.

webRtc Troubleshooter | Connectivity Stats



webRtc Troubleshooter

Core Functionality

1. **WebRTC Status Indicator (Initial Check):** This primary indicator (visible after clicking the Phone Icon) confirms the registration state of the softphone.
    - **Green Status:** Indicates WebRTC is properly registered and ready for calls.
    - **Red Status:** Indicates WebRTC is not registered, and the agent cannot make or receive calls.
2. **Troubleshooter Interface:** (Accessed via Troubleshooter Icon) Allows the agent to run diagnostics or view specific parameters that may be impacting call quality or connection reliability.
3. **Connectivity Stats:** (Accessed via Network Icon) Provides real-time statistics on network performance relevant to VoIP, such as latency or packet loss, which are crucial for assessing call quality.

Use Cases

- **Call Quality Degradation:** If an agent experiences dropped calls or choppy audio, they can access the **Connectivity Stats** to check for high latency or jitter.
- **No Incoming Calls:** If the agent is in the "Available" state but receives no calls, checking the initial **WebRTC Status** indicator (Red) and then the **Troubleshooter** can help pinpoint a registration failure.
- **Network Change Verification:** After making a network or headphone change, the agent can use the tool to verify that the WebRTC connection is stable before taking calls.

Benefits

- **Fast Issue Isolation:** Allows agents to quickly determine if a call issue is related to their WebRTC connection or local network rather than a campaign or system-wide problem.
- **Reduced IT Load:** Offloads initial voice troubleshooting from the Administrator/Voice-Admin to the agent, enabling quicker resolution.
- **Proactive Monitoring:** Encourages agents to monitor their own connection health throughout the day.

Configuration Flags

Flag	Default	Description
`disableTroubleshooterButton`	`false`	When set to `true`, hides the Troubleshooter icon from the Agent Console phone menu. Use this in deployments where troubleshooting is handled centrally by IT. *(Available from 4.13.5.HF01)*
`disableWebrtcNoiseSuppression`	`false`	When set to `true`, disables the automatic noise-suppression filter applied to WebRTC audio streams. Useful for environments where external noise-cancellation hardware is already in place. *(Available from 4.13.45)*

WebRTC Infrastructure Options

Geolocation Failover via Kamailio (4.13.8+)

For deployments spanning multiple geographies, WebRTC registrations can be routed through a **Kamailio SIP proxy** that performs geolocation-based failover. If the primary call

server in a region is unavailable, the proxy automatically redirects the WebRTC session to the nearest healthy server, minimizing call setup latency and improving resilience.

Central Registrar for Multi-Call-Server Failover (4.13.25+)

A **Central Registrar** option allows WebRTC endpoints to register against a centralized service instead of individual call servers. When a call server goes down, the Central Registrar re-routes active and new registrations to surviving servers transparently, without requiring agents to re-login or manually switch endpoints.

Limitations

- **Agent Action Required:** The agent must be aware of the tool and its indicators to effectively use it for troubleshooting.
- **Administrator Dependency:** While the tool helps identify the *source* of the issue, resolution often requires an **Administrator** or **IT personnel** to check system configurations (e.g., firewall settings, Call Manager status).

Version History

Version	Enhancement	Release Notes
4.13.5.HF01	`disableTroubleshooterButton` flag to hide troubleshooter control	
4.13.8	WebRTC geolocation failover via Kamailio	
4.13.25	Central Registrar option for multi-call-server failover	
4.13.45	Auto noise suppression via `disableWebrtcNoiseSuppression` flag	**Contact Center - Patch Release Notes - Version 4.13.45**

8.2. Productivity Tools

8.2.1. Agent Status Management

Agent Status Management is the functionality that allows agents to set their availability within the system. These statuses (e.g., "Available," "On Break," "Wrap Up") are crucial for the routing engine to know which agents are ready to receive new interactions and for supervisors to track agent productivity.

How It Works

Agents select their current status from a dropdown menu in their agent console. "Available" means the agent is ready for a new interaction. The system automatically changes an agent's status during certain activities, such as "On Call" or "Wrap Up." Agents manually select auxiliary statuses like "Break" or "Lunch" when they are not available for work.

Prerequisites

- The agent must be logged into the agent console.

Configuration Steps

- **Changing Status (Agent):**
  - **Location:** Agent > Agent Console > Top Navigation Bar
  - **Action:** Click on the status dropdown menu (which shows your current state) and select the desired new status from the list.
- **Creating Statuses (Administrator):**

- **Location :** Administrator > System COnfiguration > Break Reason Option
- **Action :** Click on Add and enter the break reason.

Use Cases

- **Going on Break:** An agent selects the "Break" status before leaving their desk, which prevents the system from routing new calls to them.
- **Becoming Available:** After finishing post-call work, an agent changes their status from "Wrap Up" to "Available".
- **Adherence Monitoring:** A supervisor views a dashboard and sees that an agent has been in an "Unavailable" status for too long, prompting a check-in.

Benefits

- **Accurate Call Routing:** Ensures that interactions are only sent to agents who are actively available to handle them.
- **Effective Workforce Management:** Provides supervisors with the data needed to track schedule adherence and agent productivity.
- **Improved Agent Accountability:** Creates a clear and transparent system for agents to manage their work state.

Break Reason Switching

Starting from version 4.13.33, the `allowBreakReasonSwitch` configuration flag enables agents to switch directly from one break reason to another without first transitioning back to the **Available** state. For example, an agent on a "Lunch" break can switch to a "Training" break in a single step. This reduces unnecessary state transitions and keeps agent status more accurate.

Limitations

- Agents forgetting to change their status correctly can negatively impact routing and productivity.

Version History

Version	Enhancement	Release Notes
4.13.33	`allowBreakReasonSwitch` flag – switch between break reasons without going Available first	**Contact Center - Patch Release Notes - Version 4.13.33**

8.2.2. Hot Keys

Overview

Hot Keys, or keyboard shortcuts, are specific key combinations that allow agents to perform common actions on their desktop without using a mouse. This can include actions like answering a call, holding a call, transferring, or dispositioning an interaction.

How It Works

The system defines a set of keyboard shortcuts for frequent tasks. For example, Ctrl+A might be configured to answer an incoming call. Agents can use these shortcuts to navigate their console and manage interactions more quickly.

Prerequisites

- The agent must be logged into the agent console.

Use Cases

- **High-Volume Call Handling:** In a busy inbound call center, an agent uses hot keys to rapidly answer, hold, and disposition calls.
- **Data Entry:** An agent uses shortcuts to quickly navigate between fields in a customer form or agent script.
- **Ergonomics:** Agents can reduce their reliance on the mouse, which can help to minimize the risk of repetitive strain injuries (RSI).

Benefits

- **Increased Speed and Efficiency:** Reduces the time it takes to perform common actions, which can decrease average handling time (AHT).
- **Improved Agent Workflow:** Allows agents to keep their hands on the keyboard, creating a smoother workflow.
- **Reduced Physical Strain:** Minimizes mouse clicks and movements, contributing to a more ergonomic work environment.

Limitations

- There is a learning curve for agents to memorize and become proficient with the hot keys.

8.2.3. Canned Responses

Overview

Canned Responses are predefined, templated replies that agents can quickly insert into text-based conversations like chat and email. They are used to answer frequently asked questions or to provide standard information, saving time and ensuring consistency.

How It Works

Supervisors or administrators create a library of canned responses for various scenarios. When an agent is in a chat or email interaction, they can access this library, search for the appropriate response, and insert it into their reply with a single click. Some responses may contain variables that are automatically replaced with customer data.

Prerequisites

- An agent must be engaged in a text-based interaction (chat, email, social media).

Use Cases

- **Standard Greetings:** An agent starts every chat with a standardized greeting like, "Hello, thank you for contacting our company. How may I help you today?"
- **Answering FAQs:** When a customer asks about the return policy, the agent inserts a pre-written canned response that details the entire policy accurately.
- **Closing Interactions:** An agent uses a standard closing message to end a chat, ensuring the customer is asked if they need any further assistance.

Benefits

- **Increased Agent Efficiency:** Drastically reduces the time spent on typing repetitive information, allowing agents to handle more conversations.
- **Improved Consistency and Accuracy:** Ensures that all customers receive the same accurate, brand-approved information for common inquiries.

- **Reduced Typos and Grammatical Errors:** Using pre-vetted templates helps maintain a high level of professionalism in all written communications.

Limitations

- Over-reliance on canned responses can make interactions feel impersonal.
- The library of responses must be actively managed to prevent outdated information from being sent to customers.

8.2.4. Knowledge Base

Overview

The Knowledge Base (KB) serves two primary functions:

1. **Centralized Repository:** It is a single source of truth for articles, policies, and troubleshooting guides that agents access from their console.
2. **Integration Host:** It is used to **host the homepage of any URL-based integration**. The agent is redirected to this host URL/page after each call (**Post-Call**) or can launch it manually during a call (**In-Call**).

How It Works

The KB is a dynamic panel within the agent interface used for both content lookup and external web application display.

Agent Workflow (Content Lookup)

- **Accessing the KB:** The agent clicks on the **Knowledge Base icon** located on the Agent Console's Left Navigation Bar.
- **Search and Retrieval:** The agent uses a search bar or browses through defined categories to find relevant articles, policies, or troubleshooting steps while interacting with a customer.

Agent Workflow (URL Integration)

- **Manual Launch (In-Call):** The agent can manually trigger the display of the integrated URL during a live conversation.
- **Automatic Launch (Post-Call):** The agent is **automatically redirected** to the integrated URL (which often serves as a follow-up action or disposition screen) after concluding each call.

Prerequisites

- The agent must be logged into their console.

Use Cases

- **Technical Support:** A support agent searches the KB for an error code and finds a step-by-step troubleshooting guide to resolve the customer's issue immediately.
- **Post-Call Data Capture:** (URL Integration Use Case) After hanging up, the agent is automatically redirected to a custom URL that hosts the post-call wrap-up form, ensuring disposition and data capture completion.
- **Manual External Tool Launch:** (URL Integration Use Case) An agent manually launches the KB panel during a call to access a specific CRM screen or external vendor tracking portal hosted within the panel.
- **Policy Questions:** An agent quickly finds the company's official return policy in the KB to provide an accurate, approved answer to the customer.

Benefits

- **Increased First-Call Resolution:** Empowers agents with instant access to accurate information.
- **Consistent Information:** Ensures all agents are providing consistent, approved answers to customers.
- **Seamless Integration:** Provides a dedicated, defined area within the Agent Console to host and manage necessary external web applications (URL integrations).
- **Reduced Training Time and Handle Time:** Agents can find answers themselves instead of asking supervisors or colleagues.

Limitations

- **Content Dependency:** The usefulness of the Knowledge Base (as a repository) is entirely dependent on the quality and accuracy of the content created by Supervisors or Administrators.

Configuration Steps (Administrative)

- **Accessing the Knowledge Base (Agent):**
  - **Location:** Agent > Agent Console > Left Navigation Bar
  - **Action:** Click on the Knowledge Base icon to open the panel.

- **Creating Knowledge Base Content (Admin/Supervisor):**
    - **HUMAN REVIEW NEEDED:** Specific UI steps for an Administrator or Supervisor to create, edit, and manage Knowledge Base articles could not be found in the provided user manuals.

9. Monitoring & Analytics

9.1. Dashboard & Stats

9.1.1. Queue Monitoring

Overview

A **Queue** is a designated group of agents responsible for handling specific calls routed via an IVR. Queue Management allows supervisors and administrators to configure how incoming calls are distributed, prioritized, and handled when agents are unavailable.

Key Capabilities

1. Intelligent Call Routing

Define exactly how calls are distributed among available agents using flexible "Resource Scheduler" logic:

- **LRU (Least Recently Used):** Routes the call to the agent who has been idle the longest to ensure fair workload distribution.
- **Skill-Based:** Routes calls to agents based on specific skill sets and proficiency levels (requires "Skill Based Routing" license).
- **Multimedia/Multiple Extension:** Supports routing for agents handling chat interactions or simultaneous voice and chat sessions.

2. Advanced Prioritization

Manage high-traffic scenarios by defining priority rules for both the queue and the customer:

- **Queue Priority:** Determines which queue gets served first if an agent is assigned to multiple queues. A call from a "High Priority" queue will be answered before a "Low Priority" queue.
- **Customer Priority (Request Queue Type):**
  - **FIFO (First In, First Out):** The standard "first come, first served" approach.
  - **Nodeflow Priority:** Allows specific customers (e.g., VIPs) to jump ahead of others in the waiting line based on defined priority levels.

3. Queue Operations

- **Transferable Status:** Control whether agents can manually transfer calls to this specific queue.
- **User Assignment:** Easily add or remove agents from a queue using the "Assign/Unassign" interface.
- **Real-time Updates:** Modifications to queue settings (Name, Priority, Scheduler) apply immediately to the system.

Use Cases

- **Prioritized Service Lines:** Ensure critical calls (e.g., Sales or Emergency) are answered before routine inquiries by assigning a higher priority level to specific queues.
- **VIP Fast-Tracking:** Enable high-value customers to jump ahead of standard callers in the waiting line using "Request Queue Priority" (Nodeflow) logic.

- **Balanced Workload Distribution:** Prevent agent burnout and ensure fair call distribution by routing incoming calls to the agent who has been idle the longest.
- **Skill-Based Routing:** Automatically direct callers to the most qualified agent based on specific competencies (e.g., Language or Technical Expertise) defined in the system.
- **After-Hours Lead Capture:** Ensure no opportunity is lost by routing calls to voicemail when agents are unavailable and instantly notifying supervisors via email.

Further Reads:

Please refer to the user guide for detailed instructions on **How Supervisors can do the Queue Monitoring?**

9.1.2. Dashboard

Overview

The Dashboard tab in the Supervisor Console provides a historical and summarized overview of all activities within a selected campaign. The interface dynamically adjusts its metrics and widgets based on the specific campaign type selected. All data provided is derived solely from the source manuals.

Inbound Campaign Dashboard

This dashboard displays activities over selectable time durations: **30 minutes**, **1 hour**, or **1 day**. Historical data refreshes every 5 minutes.

Key Metrics & Widgets:

- **Total Calls:** The count of all calls in the campaign, including inbound calls, manual outbound dials, callbacks, auto-preview dials, manual preview dials, transfer-to-campaign dials, outbound manual dials, and click-to-call dials.
- **Avg Handling Time (AHT):** The average time spent on connected calls, calculated as the sum of Customer Talk Time, Customer Hold Time, and Wrap Time of Connected Calls, divided by the total connected calls. Internal calls (Dial User) are excluded.
- **Avg Call Duration:** The total time spent on call by all agents (Talk Time plus Hold Time) divided by the total number of calls in the campaign.
- **Average Wait Time:** The average waiting time of all calls in the campaign, excluding Abandon at IVR Calls.
- **Idle Time:** The percentage of time agents were in a Ready state but not actively handling calls. This is only available for **Single Extension** in Voice and is not displayed with the Multiple Extension license.
- **Inbound Received:** The total number of inbound calls received, including abandoned calls.
- **Pending Callbacks:** The count of callbacks that are scheduled and pending completion within the selected time duration.

- **Abandoned Rate at ACD:** The percentage of calls offered at the ACD that were disconnected by the customer before connecting with an agent.
- **SLA:** A Gauge chart showing the percentage of calls answered within the configured threshold (default 20 seconds) out of all offered calls at the ACD.
- **User Disposition Summary:** Shows the count of calls disposed of using the top 5 user dispositions.
- **Inbound Call Summary:** A donut chart showing the overall call distribution as a percentage: **Connected**, **Abandon at IVR**, and **Abandon at ACD**.
- **Queue-wise Call Distribution:** A bar graph showing the distribution of calls by queue, highlighting the count of missed, abandoned, and connected calls in that queue.
- **Connected Call Volume Trend:** A line graph illustrating the volume and trend of connected calls over different time intervals.

Outbound Campaign Dashboard

This dashboard displays activities over selectable time durations: **30 minutes**, **1 hour**, or **1 day**. Historical data refreshes every 5 minutes.

Key Metrics & Widgets:

- **Total Calls:** The total number of calls dialed, including all the call types listed for the Inbound Dashboard.
- **Call Drop Rate:** The percentage of calls that were disconnected before reaching an agent.
- **Avg Handling Time (AHT):** Calculated the same as the Inbound Campaign: Talk Time + Hold Time + Wrap Time of Connected Calls, excluding internal calls.
- **Avg Call Duration:** Calculated the same as the Inbound Campaign: Total Talk Time + Total Hold Time divided by the Count of all calls.
- **Avg ACW Duration:** The average time spent by agents on disposing of calls (Wrap Up time).
- **Idle Time:** Available only for **Single Extension** in Voice campaigns, calculated as the difference between Total Ready Time and Total Service Time. Not included for Multiple Extensions.
- **Lead Penetration:** The penetration rate of a lead, indicating the minimum percentage of phone numbers attempted by the dialer.

- **Pending Callbacks:** The count of scheduled callbacks that are pending completion within the selected time duration.
- **User Disposition Summary:** Shows the count of calls disposed of using the top 5 user dispositions.
- **System Disposition Summary:** A donut chart showing the overall call distribution as a percentage, disposed of with different system dispositions.
- **Lead wise System Disposition Summary:** A bar graph showing system dispositions (e.g., Provider Temp Failure, Call Hangup, Call not Picked Up, AMD, Call Drop, No Answer, Connected) grouped by lead.
- **Lead Summary:** Provides performance metrics per lead, including **Uploaded Contacts**, **Lead Penetration Percentage**, **Connected** calls, and **AMD** (Answering Machine Detection) count.
- **Connected Call Volume Trend:** A line graph illustrating the volume and trend of connected calls over different time intervals.
- **Retry Analysis:** Shows the number of retries for a particular system disposition and the number of phone numbers reached for those attempts. Includes Auto Dial, Auto Preview Dial, Manual Dial, and Manual Preview Dial.

Chat Campaign Dashboard

This dashboard shows activities over selectable time durations: **Today**, **Last 7 Days**, or **30 Days**. Historical data refreshes every 10 minutes.

Key Metrics & Widgets:

- **User Initiated:** The count of chats actively started by Ameyo users (agents).
- **Received:** The total count of all incoming chats, which encompasses chats that were served, missed, and not responded.
- **Served:** The count of chats that an agent has replied to. This further breaks down into chats handled by a **Bot**, an **Agent**, or escalated from a **Bot to Agent**.
- **Missed:** The total number of incoming chats that disconnected at the queue without connecting to any agent.
- **Not Responded:** The count of incoming chats for which the assigned agent did not send a reply.

- **CSAT Score:** Displays the overall customer satisfaction score based on customer feedback received. It also shows the count of **Responses Received**.
- **Average FRT (First Response Time):** The average time taken by agents to send the first response after the chat was connected to them.
- **Average Resolution Time:** The average time taken to fully resolve a conversation from the moment it was assigned to an agent.
- **Average Wait Time:** The average time an incoming chat waited for an agent to connect for the first time in the selected duration.
- **Offline:** The total count of chats received during non-working hours or holidays.
- **WhatsApp Outbound Notification:** Shows graphs illustrating the count of WhatsApp messages sent **Successfully** and those **Failed to Send**. This is further filtered by messages that were **System Initiated** or **User Initiated**.
- **WhatsApp Notification - Answer Received:** Displays a bar graph of the total answers received on WhatsApp, segmented by response times such as **Answered beyond 24 hrs**, **Answered within 18-24 hrs**, **Answered within 12-18 hrs**, **Answered within 6-12 hrs**, **Answered within 6 hrs**, and **Unanswered**. This can also be filtered by **System Initiated** or **User Initiated**.
- **WhatsApp Template Effectiveness:** Shows a graph for the rating received from customers regarding the WhatsApp chat.
- **Channel-wise Distribution:** A graph showing the distribution of chat channels.
- **Incoming Chat Stats:** A line graph illustrating the trend of chat metrics: **Received**, **Served**, **Missed**, **Not Responded**, and **Offline**.
- **Chat Details:** A detailed table view that includes columns like Chat ID, Chat Status, Channel, Requested On, Customer Name, User Name, Queue Name, and Chat Duration.

Interaction Campaign Dashboard

This dashboard is split into two sections: a static area and a duration-based area.

Static Dashboard Area

This section remains static even if the time duration is changed.

- **Total Tickets:** The total number of tickets assigned to agents, categorized by priority: **High**, **Medium**, and **Low**.
- **Unassigned Tickets:** The total count of tickets that have not yet been assigned to any agent.
- **Ready Users:** The real-time number of agents who have set their status to "Auto-Chat ON" in a queue.
- **SLA "About to Breach" (Next 15 Minutes):** Shows the count of tickets for which the Service Level Agreement is close to being breached within the next 15 minutes. This is tracked for metrics like **First Assigned**, **First Response**, or **Resolve** time.
- **Tickets by Status:** A bar graph showing the number of tickets grouped by their available status (e.g., **CLOSED**, **NEW**). This view can be filtered by source, such as **Voice** or **Email**.
- **Working Tickets by Source:** A stacked bar graph of tickets that are currently being worked on by users and are not yet closed. It categorizes tickets by source (e.g., **Chat**, **Email**, **Voice**).
- **Working Tickets by Users:** A horizontal bar graph showing the breakdown of working tickets per user, further segmented by priority (**High**, **Medium**, **Low**) and tickets **In Other Campaigns**.

Duration-based Dashboard Area

This section changes based on the selected duration tab: **Today**, **Last 7 Days**, or **30 Days**.

- **Ticket Volume:** A line graph illustrating the trend of newly **Created** versus **Closed** tickets over the selected time duration.
- **CSAT Score:** Displays the customer satisfaction score based on customer feedback. It shows the count of **Responses Received** and the number of feedback requests **Requested**.
- **Lite Tickets by Status:** A bar graph displaying tickets with only external statuses, as Lite tickets only have one internal status: **Closed**.
- **Lite Tickets by Source:** A bar graph of Lite tickets, typically covering sources like **Chat** and **Voice**.
- **SLA Metrics Graphs:** A set of graphs showing Service Level Agreement performance, which can be filtered by **Priority**, **Media Channel** (e.g., chat, email, voice), and **User List**.

- **First Assigned SLA:** Shows the count and percentage of tickets that met or breached the target time for initial assignment.
- **First Response SLA:** Shows the count and percentage of tickets that met or breached the target time for the first response.
- **Resolution SLA:** Shows the count and percentage of tickets that met or breached the target time for final resolution.
- **SLA Percentage:** A line graph that tracks the live status and achievement percentage for the **First Assigned SLA**, **First Response SLA**, and **Resolution SLA**.

Parallel Predictive Campaign Dashboard

The Parallel Predictive Campaign Dashboard contains identical functionality to the Outbound Campaign Dashboard.

- It includes the same tabs as the Outbound Campaign: **Dashboard**, **Lead Monitoring**, and **Agent Monitoring**.
- The **Dashboard** tab functions similarly to the Outbound Dashboard.

Voice Blast Campaign Dashboard

The Voice Blast Campaign Dashboard contains identical functionality to the Outbound Campaign Dashboard.

- It includes the same tabs as the Outbound Campaign: **Dashboard** and **Lead Monitoring**.
- The **Dashboard** tab functions similarly to the Outbound Dashboard.

General Dashboard Functionality

- **Data Refresh:** Real-Time Data (agent activity) refreshes every 10 seconds. Historical Data refreshes every 5 minutes.
- **Freeze/Unfreeze:** The "Freeze" button stops real-time updates to review a static snapshot of the dashboard. Clicking "Unfreeze" resumes live data updates.
- **Threshold Status:** Threshold alerts for **Hold Time**, **Call Duration**, and **ACW Time** (After Call Work) are displayed. Agents breaching these limits are visually highlighted.

- **Waiting Call:** A button showing the total count of calls waiting to be answered in the campaign. Clicking it opens a list showing Customer ID, Name, Phone, Status, Agent, Status Duration, and Queue of the waiting calls.

Use Cases & benefits

Operational Efficiency and Workforce Management (WFM)

The dashboard allows businesses to analyze agent output and workload distribution over historical periods to optimize staffing and process flows.

Campaign Type	Relevant Dashboard Feature	Business Benefit
Inbound, Outbound, Voice Blast	**Avg Handling Time (AHT), Avg ACW Duration, Idle Time**	Allows managers to identify performance gaps between agents and teams, refine training programs for efficiency, and ensure agents are minimizing unproductive time (Idle Time), thereby improving agent productivity and reducing labor costs per interaction.
Interaction (Ticketing)	**Working Tickets by Users, Unassigned Tickets**	Provides a clear view of current agent workload (tickets in progress) and potential backlog (unassigned tickets). This is crucial for load balancing and preventing agent burnout or underutilization.
Outbound, Predictive	**Avg Call Duration, Connected Call Volume Trend**	Helps the business forecast required staffing levels for future dialing strategies and understand which dialing times are most effective, ensuring the right number of agents are available when needed.
Chat	**Average Resolution Time, Average FRT**	Enables management to set and enforce standards for digital interaction speed, which is a direct measure of an agent's ability to handle their assigned chat capacity efficiently.

Service Quality and Customer Experience (CX) Improvement

The dashboard metrics are directly linked to customer satisfaction, enabling the business to prioritize service quality initiatives.

Campaign Type	Relevant Dashboard Feature	Business Benefit
Inbound	**SLA Percentage, Average Wait Time**	Allows for retrospective analysis of Service Level compliance. Managers can track if the business consistently meets its commitment to customers (e.g., answering 80% of calls within 20 seconds), which is vital for customer retention and contract adherence.
Inbound, Chat	**Abandoned Rate at ACD, Missed Chats, Not Responded**	These metrics directly highlight customer frustration and lost contact opportunities. By tracking the abandonment rate, the business can identify bottlenecks in the IVR or queuing system, reducing lost business opportunities and improving the customer journey.
Chat, Interaction	**CSAT Score, WhatsApp Template Effectiveness**	Provides a historical view of customer feedback. This is the ultimate measure of service success, allowing the business to measure the impact of operational changes on customer sentiment and the effectiveness of specific communication methods.
Inbound	**Queue-wise Call Distribution**	Pinpoints specific queues (e.g., Technical Support vs. Sales) that are disproportionately contributing to missed or abandoned calls, allowing for targeted resource allocation or process fixes.

Campaign and Strategy Optimization

For proactive sales and service campaigns, the dashboard offers insights to refine targeting and dialing strategies for maximum return on investment.

Campaign Type	Relevant Dashboard Feature	Business Benefit
Outbound, Predictive	**Lead Penetration, Lead Summary**	Shows the business how deeply it has worked through its contact lists. This is essential for preventing over-dialing, optimizing list exhaustion strategies, and calculating the true cost-per-contact.
Outbound, Voice Blast	**System Disposition Summary, Retry Analysis**	Provides data on the effectiveness of the dialer. By analyzing System Dispositions (like AMD or No Answer) and Retry Analysis, the business can refine its retry rules and filtering logic to improve connection rates and reduce wasted dialing attempts.
Interaction (Ticketing)	**Tickets by Source**	Enables strategic management of media channels. The business can see if specific channels (e.g., Email vs. Voice) are generating high volumes of tickets, informing decisions on where to invest in automation or specialized agent training.

Risk Mitigation and Compliance

The dashboard provides key indicators that, when monitored, can help a business prevent breaches of service agreements and ensure continuous operation.

Campaign Type	Relevant Dashboard Feature	Business Benefit
Inbound, Interaction	**SLA "About to Breach", Resolution SLA**	The Interaction dashboard's static view highlights tickets that are nearing their resolution deadline in the next 15 minutes. This is a critical risk mitigation tool that allows supervisors to intervene immediately to prevent contractual SLA breaches and associated financial penalties or customer dissatisfaction.
Outbound, Predictive	**Call Drop Rate**	Monitoring a high Call Drop Rate helps identify potential technical issues within the dialing infrastructure or poor customer experiences early, preventing widespread service degradation.
All Campaigns	**Threshold Status**	The ability to view agents who have breached configured thresholds for **Hold Time**, **Call Duration**, or **ACW Time** serves as a warning system for potential misuse of system time or compliance risks (e.g., excessive hold times violating quality standards).

9.1.3. Agent Monitoring

Overview

The Agent Monitoring tab provides Supervisors with a detailed, historical perspective on the activities, performance, and productivity of individual agents over a specific duration (typically the last 12 hours). It serves as a central hub for deep-dive analysis into an agent's workday, encompassing their schedule, efficiency, and transaction volume across all assigned campaigns.

How It Works

The system gathers data from agents and presents it in a columnar view, allowing supervisors to see multiple metrics side-by-side for all agents.

- **Data Aggregation:** The view aggregates historical data over the last 12 hours (default setting) for metrics like duration and volume (e.g., Total Talk-Time, Connected Calls).
- **Data Refresh:** The display provides clear indicators for the refresh rate of different data types:
  - **Real-Time Data (Agent Activity):** Refreshes every 5 seconds.
  - **Historical Data (Statistics):** Refreshes every 5 minutes.
- **Search and Filter:** Supervisors can search for a specific agent using their User ID or Username.
- **Performance Metrics:** The columns are organized to track agent time spent in various states (Ready, Break), their efficiency (AHT, Avg ACW Duration), and their output (Connected Calls, Wrapped Calls).

Prerequisites

Campaign Type	Prerequisites
All Campaigns	The agent must be **Staffed** to the campaign.
Voice Campaigns	The agent must have logged in and selected a **Call Context** or **Extension** (phone number) for voice-related metrics to populate.
Interaction Campaigns	The agent must be set to **Ticket Assignment On** for their status to be considered "Ready" to receive tickets.

Configuration Steps

The supervisor can customize the information displayed:

1. **Customize View:** The supervisor can manually select which columns (metrics) are visible in the table.
2. **Reorder Columns:** Columns can be dragged and dropped to change their display sequence for easier analysis.

Use Cases

Campaign Type	Use Case
Inbound, Outbound, Predictive	**Performance Review Preparation:** Reviewing the historical **AHT** and **Avg ACW Duration** for a specific agent over the last 12 hours to identify coaching opportunities related to efficiency and wrap-up time.
All Voice Campaigns	**Call Volume Analysis:** Checking an agent's **Connected Inbound**, **Connected Auto Dials**, and **Connected Manual Dials** volume to compare productivity against peers and determine if the agent is achieving their call targets.
Interaction (Ticketing)	**Workload Balancing:** Monitoring an agent's **Assigned Tickets** and the breakdown by **High/Mid/Low Priority** to prevent a single agent from being overloaded while others are under-utilized.
All Campaigns	**Schedule Adherence Check:** Using **Ready Duration** and **Break Duration** combined with **Breaks** count to verify an agent is following their assigned schedule and minimizing unplanned downtime.
Outbound Only	**Compliance/Operational Audit:** Tracking an agent's **Working Mode** (**WFO/WFH**) to ensure they are logging their remote status correctly as per company policy.

Benefits

1. **Targeted Coaching:** By analyzing detailed historical metrics like **AHT** and **Total Talk-Time** on an individual level, supervisors can provide personalized, data-driven feedback to improve agent efficiency and quality.
2. **Fair Performance Evaluation:** The standardized set of metrics ensures that all agents are measured against the same criteria, allowing for objective and fair performance reviews.
3. **Proactive Risk Identification:** High values for metrics like **Avg Hold Duration** or excessive **Break Duration** signal potential problems (e.g., system issues, agent disengagement) that the supervisor can address before they impact customer service.
4. **Campaign Alignment:** The ability to see metrics specific to the campaign type (e.g., **Connected Auto Dials** for Outbound, **Closed Tickets** for Interaction) ensures that the

monitoring focus is aligned with the goals of that business process.

Limitations

- **Time Window Restriction:** Most performance and productivity metrics are limited to the **last 12 hours** of activity, which may not be sufficient for weekly or monthly performance analysis.
- **No Internal Call Inclusion (AHT):** The **Avg Handling Time** calculation specifically excludes internal calls (Dial User), which means a complete picture of an agent's total time spent on the system is not available from AHT alone.
- **Multiple Extension Ambiguity (Voice):** If an agent uses multiple call campaigns, the view only shows the stats of campaign selected in one row, which might obscure the agent's full voice-related activity.
- **Read-Only View:** This tab is purely for monitoring; it does not offer the real-time intervention controls (Snoop, Barge, Conference) available in the Live Monitoring tab.

9.2. Monitoring & Coaching

9.2.1. Live Monitoring of Inbound Campaign

Live Monitoring: Inbound Campaign Interface

This dashboard allows Supervisors to track Inbound Campaign activity. The interface is organized into specific sections for alerts, data timelines, and summary metrics.

The Live Monitoring feature allows the Supervisor to view real-time activities and call statistics for the campaigns to which they are assigned. The interface and the available monitoring tabs are entirely dependent upon the type of campaign selected in the Left Side Navigation Bar.

The general interface elements for Live Monitoring include:

- **Left Navigation Section:** A fixed sidebar to select the process or campaign. The content of the Monitor Tab is based on this selection.
- **Cautionary Extension Selection Message:** A red bar that displays at the top if the Supervisor has not selected their phone extension. Clicking this bar allows the Supervisor to select the extension. (Applicable to Voice Campaigns)
- **Freeze/Unfreeze:** The "Freeze" option pauses the Live Monitoring Tab to prevent updates in any graph or report. Click "Unfreeze" to resume receiving the latest updates.

Common Monitoring Operations (Voice Campaigns)

In all voice-based Live Monitoring tabs (Inbound, Outbound, and Parallel Predictive Campaigns), the Supervisor has the capability to perform the following real-time operations on an agent's active call through a floating window:

- **Snoop:** The Supervisor can secretly listen to the live conversation between an agent and a customer. Neither the agent nor the caller is aware of the Supervisor's presence.
- **Whisper:** The Supervisor can join the call to provide guidance or assistance to the agent directly. Only the agent hears the Supervisor's voice, while the customer remains unaware.
- **Conference:** The Supervisor can force a conference call, connecting themselves as a third party to the live conversation.
- **Barge:** The Supervisor can fully take over the call. The agent's microphone is automatically muted, and the Supervisor becomes the owner of the call, with the ability to dispose of it.
- **Disconnect:** The Supervisor can forcibly disconnect a live call, terminating both the customer's and the agent's channels.
- **Force Logout an Agent:** The Supervisor can forcefully log an agent out of the system at any moment, regardless of whether they are on a call.

Data Collection & Duration (Voice Campaigns: Inbound/Outbound)

For **Inbound** and **Outbound** Campaigns, the data collection intervals are explicitly indicated in a horizontal bar.

Data Type	Refresh Interval	Font Color	General Impact
Real-Time Data	Every 10 seconds	Black font color	Has a real-time impact on the database, typically agent activity.
Historical Data	Every 5 minutes	Purple font color	Generally does not impact the database in every instance.
Stats Duration	Last **30 minutes**	N/A	Shows the time range of data displayed.
Stats Reset	N/A	N/A	Indicates the time before which the monitoring data was last refreshed.

Note: The Chat Campaign's Queue Monitoring mentions an interval where Real-Time is "refreshed after every **10 secs**" and Historical Data is "refreshed after every **7 mins**" for a "Stats Duration: last **12 hours**".

Live Monitoring for Voice Campaigns (Inbound & Outbound)

Live Monitoring for Inbound and Outbound campaigns is divided into three main summary sections and an Agent List.

Total Calls: Campaign Runtime Summary

This section shows metrics for the **last 30 minutes**.

Metric	Inbound Campaign	Outbound Campaign	Description
Manual Dials	✔	✔	Total count of manual dial and manual preview dial calls in the campaign.
Callbacks Received	✔	✔	Total number of callbacks including Queue, Campaign, Self, and Preview Callback.
Transfers Received	✔	✔	Total number of transferred calls received in the campaign.
Inbound Received	✔		Total number of inbound calls received in the campaign.
Auto Dials		✔	Total number of auto-dial calls made in this campaign.
Connected	✔	✔	Total calls answered by the customers.
Not Connected	✔	✔	Total number of not connected calls.
Auto-Call On Duration %	✔	✔	Percentage of duration agents had "Auto-Call ON" while in the ready state.
Started Since		✔	Time since the agent started calling after changing status to "Available".
Total Talk Time	✔	✔	Total duration of all agents spent on calling.
Total Idle Time %	✔	✔	Percentage of Total Idle Duration (Total Ready Time - Total Service Time) divided by Total Ready Duration.
Total Ready Time %	✔	✔	Total percentage of duration agents were on "Ready" state while staffed in the campaign.

Total Agents: User Runtime Summary

Metrics that show the runtime summary for logged-on users. All metrics below show **current data** and updates every 10 seconds.

Metric	Description
Break	Number of agents on break divided by total agents on break status in the campaign. **(Clickable)**
Ready	Number of unique agents staffed in the campaign on "Available" status. **(Clickable)**
Connected	Number of agents connected to calls in the campaign. **(Clickable)**
On ACW	Number of agents in "Wrap Up" (disposing) of calls. **(Clickable)**
Customers on Hold	Number of agents who have put their customers on hold (includes agents in conference). **(Clickable)**
"Auto-Call On" and "Auto-Call Off"	Counts of connected/not on call agents with Auto-Call status enabled/disabled.
Auto-Call On and Not on Call	Number of agents with "Auto-Call On" and "Available" status, but not on a call. Tracked in intervals: <20 sec, 20-60 sec, >60 sec.
Avg Inactive Duration	The average of all inactive duration of agents staffed in the campaign.
Avg Handling Time (AHT)	(Customer Talk Time + Customer Hold Time + Wrap Time of Connected Calls) / Total connected calls (excludes internal calls).
Avg Talk Time	Total time spent talking to customers / Total number of answered customer calls.
Avg ACW Duration	Average time spent by all agents disposing the calls (Wrap Up time).

Metric	Description
Avg Hold Duration	Total hold time / Count of customer calls with holds.

Total Customers: Customer Runtime Summary (Inbound Only)

This section shows current customer call status metrics.

Metric	Description	Data Refresh Interval
IVR	Current number of calls waiting on IVR.	10 seconds.
Queued at ACD	Current number of calls waiting on Automatic Call Distribution (ACD) in the campaign.	10 seconds.
Queued	Current number of customer calls (Preview and Callback) waiting for initialization (Inbound: callbacks and manual callbacks).	10 seconds.
Hungup	Number of calls disconnected but not yet disposed of. Resets once the call is disposed.	10 seconds.
Connected	Total number of connected calls in the selected campaign.	10 seconds.
Others	Total number of calls in ringing state for transfer to queue/campaign/IVR, or connected state for transfer to phone.	10 seconds.
Abandon Rate at ACD %	Total percent of customer calls in ringing state before reaching back to ACD.	10 seconds.
Call Drop Rate %	Total percent of customer calls dropped before the agent answers.	10 seconds.

Agent List (Inbound & Outbound)

The list displays the live status of agents staffed to the campaign. All data shows **current data** and updates every 5-10 seconds.

Column	Description
Agent Name	Usernames of the agents assigned in the campaign.
Agent ID	IDs of the agents assigned in the campaign.
Extension	Extension selected by or forcefully assigned to an agent.
Auto Call Status	Auto-call status of an agent.
Agent Status	Current status of the agent and duration on that status.
Call Context	Call context assigned to an agent.
Agent Call Status	Call status of an agent (e.g., "Connected").
Call Type	Type of call connected with the agent at present (e.g., Inbound, Auto Dial).
Phone	Customer information (Outbound: call context; Manual Dial: phone number).
Customer Call Status	Status of the customer's call.
Working Mode	Selected working mode by the agents (WFO/WFH).
Queue	Name of the queue for the connected call.
Group Manager	Name of the group manager under whom the agent is assigned.

Column	Description
Groups	Names of the groups in which the agent is assigned.
Table Filters	Name of the table filter when the masking feature is enabled.

Monitoring Operations (Inbound & Outbound)

The Supervisor can perform various operations on an agent's live call using the floating panel accessed by clicking a record.

Operation	Description
Snoop	Listen to the conversation between the agent and customer; both remain unaware of the supervisor's activity.
Whisper	Connect in between the live call to assist the agent. The customer only hears the agent's voice.
Conference	Force confer a live call.
Barge	Connect in between the call, taking ownership. The agent is automatically put on mute. CRM pops up automatically.
Disconnect	Force disconnect the live call, ending both customer's and agent's channel.
Force Logout an Agent	Forcefully log out an agent from the system. Highlighted even if the agent is not on a call.

Call Duration Threshold (Licensable)

The Supervisor can configure threshold limits for call duration metrics for agents. This is a **licensable feature**.

Threshold Type	Definition	Color Change Trigger
Hold Time Breached	Threshold limit for Customer Hold Time.	When the agent breaches the time limit.
ACW Time Breached	Threshold time for After Call Work (ACW) duration for disposing a call.	When the agent breaches the time limit.
Call Duration Breached	Threshold for Call Duration (sum of Customer Talk Time and Customer Hold Time).	When the agent breaches the time limit.
Break Duration Breached	Threshold limit for the agent's break duration.	When the agent breaches the time limit, color corresponds to the process-level **Color Configuration**.

Note: The color of the agent list reverts to white once the agent resumes the call or leaves the breached status.

9.2.2. Live Call Monitoring Operations (Agent Coaching and Monitoring)

Overview

Monitoring Operations allow the Supervisor to intervene or observe a live call session through a floating panel accessed by clicking on an agent's record in the Live Monitoring screen. These functions are only highlighted when the agent is on a call, with the exception of the "Force Logout" function.

Common Monitoring Operations (Voice Campaigns)

In all voice-based Live Monitoring tabs (Inbound, Outbound, and Parallel Predictive Campaigns), the Supervisor has the capability to perform the following real-time operations on an agent's active call through a floating window:

Snoop (Listen/Monitor)

This feature is used when the Supervisor wants to **listen to the conversation** between the agent and the customer on a live call. While a call is being snooped, **both the agent and the caller will remain unaware** of the Supervisor's activity.

Use Cases & Benefits (External Research)

- **Quality Assurance (QA):** Allows managers to conduct **silent, non-disruptive monitoring** of agent-customer interactions to ensure adherence to company policies, scripts, and service standards.
- **Performance Assessment:** Enables the collection of **unbiased, real-time data** on an agent's typical performance without altering their behavior.
- **Identifying Training Gaps:** Helps supervisors uncover systemic issues in agent knowledge or current call center scripts.

Whisper

This feature is used when the Supervisor wishes to **guide or assist the agent** during a live call. The **Customer will only hear the voice of the agent** and will **not hear the Supervisor**.

Use Cases & Benefits (External Research)

- **Real-Time Coaching:** Enables Supervisors to provide **instant, discreet advice** to an agent (e.g., correct a misstatement or offer critical product information).
- **New Agent Onboarding:** Acts as a **safety net** for new or struggling agents, boosting their confidence and allowing them to handle live calls sooner with expert backup.
- **Complex Queries:** Helps agents navigate difficult or unique customer problems without placing the customer on hold, leading to **faster issue resolution**.

Barge

Barge allows the Supervisor to **take ownership of the call**. When a supervisor barges, the **Agent goes on Mute-mode automatically** but can still listen to the conversation between the customer and the Supervisor.

Use Cases & Benefits

- **Handling Escalations:** Allows the Supervisor to **immediately intervene** when a customer requests a manager or a call is deteriorating.
- **De-escalation of High-Stress Calls:** Enables a senior, experienced team member to take full control of a conversation, especially with **highly frustrated customers**.
- **Correcting Critical Errors:** Provides the ability to **override an agent** who is about to make a critical, policy-breaching, or compliance-related error.

Conference

The Supervisor can force a conference call, connecting themselves as a third party to the live conversation.

Disconnect

The Supervisor can forcibly disconnect a live call, terminating both the customer's and the agent's channels.

Force Logout an Agent

The Supervisor can forcefully log an agent out of the system at any moment, regardless of whether they are on a call.

Configuration parameters

Key / parameter	Description	How to configure	Constraints / allowed values	Sample
Snoop / Whisper / Barge node flows	Campaign-level call-flow definitions that carry the Supervisor's media stream.	Administrator > **Process** > **[Process]** > **[Campaign]** > **Monitoring** tab > Snoop / Whisper / Barge node flow.	Select from preconfigured node flows; require matching **Dial Profile**.	Default Snoop node flow.
Conference Dial Profile	Outbound leg used to dial the Supervisor into the conference.	Administrator > **Process** > **[Campaign]** > **Dial Profile** > **Conference Dial Profile**.	Must reference a valid voice resource.	`conf-dial-profile-01`.
Privilege masking override	A Supervisor can override their own role's mask for Confer, Snoop, Whisper, or Barge within their session.	Supervisor > **Settings** > **Privileges** (if enabled on the role).	Supervisor overrides are audited and apply only to their session.	Enable Confer for the current shift.

> If the **Confer Call** privilege has been masked for a Supervisor, the **Conference** button is also hidden from the floating window. Campaign-level privileges set by the Supervisor override those set by the Administrator.

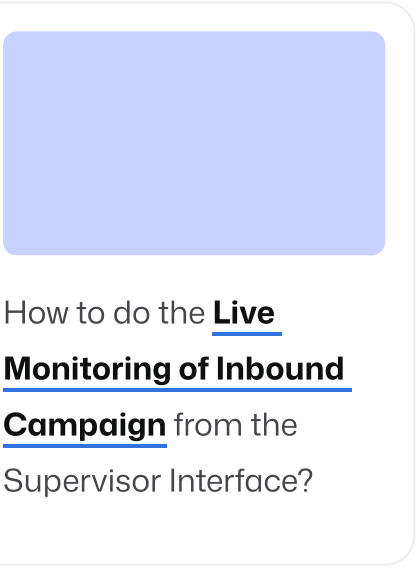
Limitations

- Monitoring operations are only available on **voice** interactions; chat and ticket interactions do not expose Snoop / Whisper / Barge.
- The Supervisor must have a valid **extension** selected before any of these operations can be used.
- Force Logout requires a **mandatory reason** and is captured in the audit trail.

Related pages

- **Live Monitoring of Inbound Campaign** – supervisor dashboard that exposes these controls on voice agents.
- **Live Monitoring of Outbound Campaign** – outbound counterpart.
- **Call Barge / Call Conference / Call Whisper** – feature-level deep dives.
- **Masked Privileges / User Function Masking** – how privilege masking interacts with these controls.
- **Audit Trail** – where Force Logout / Barge / Disconnect events are recorded.

Further Reads:



How to do the **Live Monitoring of Inbound Campaign** from the Supervisor Interface?

10. Digital Channels

10.1. Routing & Rules

10.1.1. Routing Rules

Overview

The **Routing** tab within the **Rule Engine** allows the administrator to create, manage, and execute automated rules for inbound customer interactions, primarily concerning **media profiles**1. The purpose of these rules is to define how incoming messages, emails, or calls from specific sources should be processed, including determining their priority, final destination (queue/agent), or triggering external actions.

Key Benefits

- **Automated Action:** Rules execute automatically upon detecting specific conditions, eliminating the need for manual processing of incoming interaction.
- **Multi-Channel Control:** Enables precise routing rules for tickets originating from various **media profiles** (e.g., email, chat).
- **Flexible Prioritization:** Allows setting the **Priority (High, Medium, Low)** of incoming messages or calls that meet predefined criteria.
- **External System Integration:** Supports **HTTP Action (Webhooks)** to trigger external APIs and integrate with third-party systems based on routing rules.

Functionality

The Routing tab manages the flow of incoming interactions by applying a series of user-defined rules and policies.

Rule Processing

- **Execution Order:** Rules are executed in a **First In First Out (FIFO)** sequential order from the top of the list12.
- **Priority Adjustment:** You can manually change the execution priority using arrow icons (up/down) to move rules in the sequence13.
- **Logical Conditions:** When creating a rule with multiple conditions, you must define the logic: **"Match any of the following"** (OR logic) or **"Match all of the following"** (AND logic).

Available Actions

Actions define the outcome of a rule if its conditions are met:

- **Routing Action:** Transfers a ticket or message to a designated **Campaign** and **Queue**, and then optionally attempts to assign it to a specific user type (**Available Agents**, **Any Agent**, **Agent Available to take Tickets**)1515151515151515.
- **Set Priority:** Changes the ticket priority to Low, Medium, or High16161616.
- **HTTP Action:** Triggers an **external API (Webhook)**171717.

Prerequisites

- A **Media Profile** must be created and integrated for the specific channel (e.g., email) that the rule intends to manage19.

Usage Instructions

The following steps outline how to **Add a Rule** in the Routing tab:

1. Navigate to the **Rule Engine** tab and click **"Routing"**.
2. Click the **"New Rule"** button.
3. Enter a descriptive **Rule Name** and **Rule Description**.
4. Define **Conditions** (LHS and RHS):
    - Click the add icon (plus sign) in the "Condition" box.
    - Select an attribute (e.g., **Interaction Title**, **To**, **Message**, **Media Profile ID**) from the drop-down menu

- Select a logical operator (**is**, **contains**, **starts with**, **is not**, etc.).
- Provide a corresponding **Value** for the condition.
- If adding multiple conditions, select either **"Match any of the following"** or **"Match all of the following"**.

5. Define **Actions**:
   - Click the add icon in the "Actions" section.
   - Select the type of action: **Routing Action**, **Set Priority**, or **HTTP Action**.
   - Configure the selected action with the required details (e.g., Campaign, Queue, Priority level).
   - Multiple actions can be added; they will execute in sequence from top to bottom.
6. Click **"Save"** to create and enable the rule.

10.1.2. Event Based Rule

Overview:

Event-based rules are automated processes within the system that **execute automatically** upon detecting the occurrence of a specific event (e.g., ticket creation, status change, escalation). They allow Administrators to define conditions and subsequent actions for tickets in an automated, real-time manner.

Key Benefits:

- **Real-time Automation:** Automatically handles routine tasks immediately upon a trigger event, without manual intervention.
- **Process Compliance:** Enforces consistent business rules (like auto-escalation or notification) across campaigns and processes.
- **Customizable Workflow:** Allows creation of complex workflows by combining a vast array of events, conditions, and sequential actions.

Functionality:

The Event-based Rules engine works by evaluating a defined set of criteria against an event.

1. Events (The Trigger)

This is the moment the rule starts. Events cover the entire ticket lifecycle.

Available Events:

Event	Description	Configuration Notes
New Ticket Created	Generated when a new ticket is created (via email, call, manual, or API).	
New Lite Ticket Created	Generated whenever a new lite ticket is created.	
Ticket Updated	Generated whenever an update is detected (e.g., escalation marked, priority changed, new message received).	Provides an adjacent drop-down for sub-conditions.
Ticket Transferred To Agent	Generated when a ticket is transferred (Supervisor ↔ Agent or Agent ↔ Agent).	Allows selection of the ticket **assignor** and **assignee**.
Ticket Auto-Assigned	Generated whenever a ticket is auto-assigned to an agent.	
Priority Changed	Generated whenever the priority of any ticket is changed to "Low", "Medium", or "High".	Allows selection of the **previous** and **current** priority value.
Private Note Added	Generated whenever a private note is added to the ticket.	
Public Note Added	Generated whenever a public note is added to the ticket.	
Message Sent	Generated whenever a message is sent out as a reply from the ticket.	
Ticket Status Changed	Generated whenever the status of a ticket is changed.	Allows selection of the **previous** and **current** ticket status.
Heat Value Changed	Generated whenever the Heat value is changed (greater than or less than a defined value).	Requires selecting a sub-condition and providing a user-defined value.
Mail Sending	Generated whenever mail sending fails (due to Exchange Server or internal mail	

Event	Description	Configuration Notes
Failed	service failure).	
Custom Field Updated	Generated whenever a custom field is updated or changed.	Provides an adjacent drop-down to select the custom field.
Ticket Escalated	Generated whenever a ticket is escalated.	
Ticket Deescalate	Generated whenever a ticket is de-escalated.	
Ticket Picked Manually	Generated whenever a ticket is manually picked.	
Resolve SLA Breached	Generated whenever the SLA for resolving a ticket is breached.	
First Assign SLA Breached	Generated whenever the very first assigned SLA of a ticket is breached.	
First Response SLA Breached	Generated whenever the very first response SLA of a ticket is breached.	
New Message Received	Generated whenever a new message is received.	
Ticket Reopened	Generated whenever a ticket is reopened.	

2. Conditions

Conditions are logical gates that must be satisfied for the actions to execute.

Condition	Description	Available Operators
Media Profile	Based on the ID of the media profile.	is, is not
Ticket Status	Based on the current ticket status.	is, is not
Current Time	Based on the current system time.	is, is not, greater than, less than, Within
Queue	Based on the queue the ticket is in.	is, is not, greater than, less than, Within
Priority	Based on the ticket's priority value.	is, is not
Subject	Based on the ticket's subject line.	is, is not, contains, does not contain, ends with, starts with
Custom Field	Based on the value of a system-level custom field.	Selection based on field type. Multi-level custom fields support condition checking on partial level selections.
Other Conditions	Includes customer fields: timezone, twitter, facebook, email, and phone1 through phone5.	is, is not

Multiple Conditions Logic:

- **Match any of the following (OR logic):** The rule applies if one or more conditions are matched.
- **Match all of the following (AND logic):** The rule applies only when all conditions are matched.

3. Actions (The Outcome)

These are the tasks performed on tickets that satisfy both the event and the conditions. Actions are executed in the sequential order they are listed.

Action	Description	Key Configuration Details
Escalate Ticket	Sets the escalation status of the ticket.	Select true or false.
Set Custom Field	Sets a specific value for a selected custom field.	Select custom field and provide the new value.
Transfer Ticket to Queue	Transfers the ticket to a new queue and assigns it to an agent.	Select **Queue** and an **Assign to User** option: **Available Agent**, **Agent Available to Take Tickets**, or **Any Agent**.
Send Email To (Various)	Sends an email to a specific recipient, Supervisors, Agents, or the Requester.	Select **Media Profile**, provide **Subject**, and write the **message body**.
Send Feedback To Requester	Sends a feedback request email.	Must contain the placeholder {{feedback:form}}. The new FeedbackId placeholder can be used to send a feedback link instead of an embedded form.
Assign Ticket to Agent	Assigns the ticket to a specific agent.	Select the target **Agent**.
Set Status	Changes the status of the ticket.	Select the new **Status** value.
Priority	Increases or decreases the priority of the ticket.	Select **Increment** or **Decrement**.
Set Priority	Sets a fixed priority value for the ticket.	Select **Low**, **Medium**, or **High**.
HTTP Action	Triggers an external API (Webhook).	Refer to dedicated HTTP Action documentation.
Set Custom Field Using HTTP Action Response	Updates a custom field using JSON data from a preceding HTTP Action response.	Requires specific JavaScript in the preceding HTTP Action's Post-Request Script tab: variables.put("$thridPartyCustomFieldData",responseString);

Prerequisites:

- **Administrator Access:** Required to access and configure the Rule Engine.
- **Defined Processes and Campaigns:** Rules must be scoped to an existing Process and Campaign.
- **Media Profiles (for Email Actions):** Must be configured prior to using any email actions.

Usage Instructions:

A. Create a New Event-based Rule

1. Click **"New Rule"**.
2. Provide a **Name** and **Description**.
3. Select the relevant **Process** and **Campaign**.
4. In **Events**, select the trigger (e.g., **Ticket Status Changed**).
5. In **Conditions**, click the **add icon** (+) to configure one or more conditions.
6. Select the **Multiple Conditions Logic** (**Match any** or **Match all**).
7. In **Actions**, click the **add icon** (+) to configure one or more actions.
8. (Optional) Check **"Stop Execution after this rule"** to prevent subsequent rules from running.
9. Click **"Save"**.

B. Edit or Delete a Rule

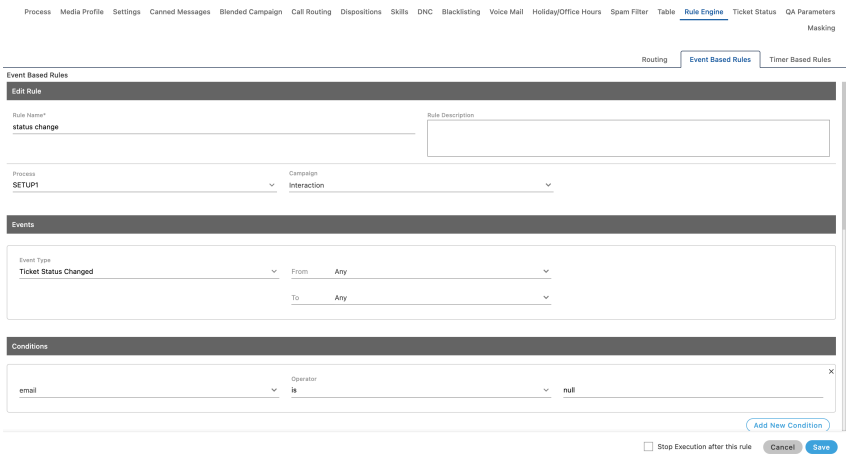
- **Edit:** Select a rule, click the **Edit icon** (pen), make changes, and click **"Save"**.
- **Delete:** Select a rule, click the **Delete icon** (trash can), and confirm with **"Yes"**.
    - *Note: A deleted rule cannot be retrieved.*

C. Enable/Disable Rule

- **Disable:** Click the green **toggle switch** on the rule and confirm.
- **Enable:** Click the gray **toggle switch** on a disabled rule and confirm. (Check **"View Disabled Rules"** to view inactive rules).

Related Features/Modules:

Feature/Module	Description
Timer-based Rules	Rules that execute at scheduled time intervals rather than being triggered by an event.
Routing Rules	Used for initial ticket distribution and assignment upon creation.
Custom Fields	Allows the creation of user-defined data fields that can be used as both conditions and targets for actions in Event-based Rules.
HTTP Action Configuration	The separate configuration area providing deeper details on external API integration for the HTTP Action.



10.1.3. Timer-based Rules Configuration

Overview:

Timer-based Rules are automated processes that execute at regular, scheduled intervals, unlike Event-based Rules which run instantly upon a trigger. These rules are executed only on tickets that meet a defined set of conditions, making them ideal for monitoring ticket status, checking SLA breaches, and performing time-sensitive actions like escalation or notification.

Key Benefits:

- **SLA Enforcement:** Automatically monitors time-based metrics (e.g., hours since creation, first response due) to ensure service level agreements are met.
- **Proactive Follow-up:** Enables scheduled actions like sending reminders to agents or customers after a period of inactivity.
- **Scheduled Maintenance:** Allows for bulk actions, such as changing the status or priority of aging tickets at set intervals.

Functionality:

Timer-based rules function by periodically scanning all tickets within the configured **Process** and **Campaign** and applying **Actions** only to those that satisfy the **Conditions**.

1. Conditions (The Criteria)

Conditions for Timer-based Rules focus heavily on time elapsed since a specific event or on current ticket states.

Condition Category	Description	Key Operators
Ticket Time Metrics	Elapsed time since various ticket life-cycle events: **Hour Since Created**, **Hour Since Resolved**, **Hour Since Unassigned**, **Hour Since First Assigned**, **Hour Since Reopened**.	less than, greater than, **(office hours) less than**, **(office hours) greater than**
SLA Due Time	Elapsed time since an SLA milestone was due: **Hour Since First Response Due**, **Hour Since First Assign Due**, **Hour Since Ticket Resolution Due**.	Same time-based operators as above.
Response Time	Time elapsed since the last response: **Hour Since Agent Responded**, **Hour Since Requester Responded**.	Same time-based operators as above.
Basic Ticket Fields	Filtering by **Queue**, **Current Time**, **Media Profile ID**, **Ticket Status**, and **Priority**.	is, is not, greater than, less than, Within (for time/numeric fields)
Text Fields	Filtering by **Subject**, **Requester Email**, and **Email CC**.	contains, does not contain, ends with, starts with
Analytics/Sentiment	Filtering by **Customer Current Sentiment**, **Customer Overall Positive Index**, **Ticket Heat Index**.	is, is not, greater than, less than, Within
Message Count	Filtering by **Requester Message Count**, **Agent Message Count**, and **Requester Message Count (Today)**.	Same time-based operators as above.

Multiple Conditions Logic:

- **Match any of the following (OR logic):** The rule applies if one or more conditions are matched.
- **Match all of the following (AND logic):** The rule applies only when all conditions are matched.

2. Actions (The Outcome)

Actions are executed sequentially on all filtered tickets.

Action	Description	Configuration
Assign/Transfer	**Assign Ticket to Agent** or **Transfer Ticket to Queue**.	Select Agent/Queue and Assignment logic (**Available Agent**, **Any Agent**, etc.).
Escalate/Priority	**Escalate Ticket**, change priority via **Priority** (Increment/Decrement), or set fixed priority via **Set Priority** (Low/Medium/High).	Select operator (true/false for escalate, Increment/Decrement for Priority).
Set Status/Custom Field	**Set Status** or **Set Custom Field**.	Select the target field and provide the new value.
Send Email (Various)	Notifications sent to Agent, Requester, Supervisors, or All Agents in Queue.	Configure Media Profile, Subject, Message Body (supports placeholders).
HTTP Action (Webhook)	Triggers an external API.	Refer to "HTTP Action" documentation.
Set Custom Field Using HTTP Action Response	Updates a custom field using external API data.	Requires preceding **HTTP Action** with the specific JavaScript in the Post-Request Script tab: variables.put("$thridPartyCustomFieldData",responseString);

Prerequisites:

- **Administrator Access:** Required to create and manage rules.
- **Defined Process and Campaign:** Rules must be scoped to an existing Process and Campaign.
- **SLA Configuration (for time-based metrics):** Time-based conditions rely on properly configured office hours and SLAs.

Usage Instructions:

A. Create a New Timer-based Rule

1. Click **"Add"** to create a new rule.
2. Provide a **Name** and **Description**.
3. Select the **Process** and **Campaign** for rule applicability.
4. In the **Conditions** section, click the **add icon** (+) to configure one or more conditions.
5. Select the **Multiple Conditions Logic** (**Match any** or **Match all**).
6. In the **Actions** section, click the **add icon** (+) to configure the actions to be executed.
7. Click **"Save"** to create the rule.

B. Manage Rules

- **Edit:** Select a rule, click the **Edit icon** (pen), make changes, and click **"Save"**.
- **Delete:** Select a rule, click the **Delete icon** (trash can), and confirm with **"Yes"**. (Note: Deleted rules cannot be retrieved).
- **Enable/Disable:** Click the **toggle switch** on a rule to change its status. Use **"View Disabled Rules"** to see all inactive rules.

Related Features/Modules:

Event Based Rule

10.1.4. Routing Rule for Offline Chat

Overview:

The **Offline Chat Routing Rule** is a critical mechanism for capturing customer chat messages received through multimedia channels (such as WhatsApp, Facebook Messenger, or Twitter DM, typically integrated via Sunshine/Smooch) when agents are unavailable due to non-working hours or holidays. This feature ensures no customer interaction is lost by automatically storing the messages on the **Ameyo Application Server** and converting them into actionable **tickets** for agent follow-up.

Key Benefits:

- **Complete Message Capture:** Prevents loss of customer support requests that occur outside of defined business hours.
- **Automated Ticket Generation:** Structurally converts raw offline messages into tickets, enabling organized agent workflow.
- **Proactive Customer Acknowledgment:** Uses an automatic **Nodeflow** to immediately inform customers that their message was received and an agent will follow up.

Functionality:

1. The Routing Rule

The core function is triggered by an interaction's title, which the system automatically prefixes for offline chats.

Component	Detail
Input Channels	Multimedia channels (WhatsApp, Facebook Messenger, Twitter DM, etc.)
Routing Action	Stores the message in the Ameyo Application Server and creates a new ticket.
Existing Tickets	If a ticket for the customer already exists, new offline messages are appended to it.
Message Capture Window	Customers have a **2-minute window** to send multiple messages, which are all captured and attached to the record. Messages sent after this 2-minute window are **not captured** by the existing rule logic.

2. Predefined Nodeflow Messages

Administrators must configure and upload a nodeflow to manage the automated customer responses during offline periods. These predefined messages are displayed to the customer to set clear expectations:

Scenario	Default Message
Non-working hours	"Sorry, we are currently closed. Please leave a message and we will get back to you during office hours."
Holidays	"Sorry, we are closed today on account of a holiday. Please leave a message."
After 2 minutes of chat window	"A ticket has been created with the above details. Our customer care representative will contact you in the next working hour."

Prerequisites:

- **Channel Integration:** The multimedia channels must be successfully integrated (e.g., via Sunshine/Smooch).
- **Business Hours Defined:** Working hours and holidays must be configured in the system to enable the routing rule to correctly identify "offline" times.
- **Nodeflow Management:** An updated nodeflow must be prepared and uploaded to the system to manage the automated predefined responses.

Usage Instructions:

Creating the Offline Chat Routing Rule

Administrators must configure a specific routing rule to identify and handle these missed chat interactions:

1. Navigate to **Rule Engine > Routing**.
2. Click to create a **new rule**.
3. Provide a clear **Rule Name** and **Description** (e.g., "Auto-Ticket for Offline Chat").
4. **Add a Condition:**
    - **Field:** Select **Interaction Title**.
    - **Operator:** Select **Starts With**.
    - **Value:** Enter the exact string: Offline chat from:
5. **Add an Action:**
    - **Type:** Select **Routing Action**.
    - Select the desired target **Campaign** and **Queue** where the offline tickets will be assigned.
    - **Assign to User:** Select **None**.
6. Click **Save** to activate the rule.

10.1.5. Routing Rules for Missed chat

Overview:

A **Missed Chat** occurs when a customer's chat message is received but is not attended to by any available agent. Common causes include the customer initiating the chat **outside of business hours or on holidays**, or when **all agents are currently busy** handling other interactions. The Ameyo solution ensures these critical interactions are captured by automatically generating tickets.

Key Benefits:

- **Prevent Lost Opportunities:** Ensures critical requests (e.g., sales leads, billing inquiries, plan changes) are recorded and addressed.
- **Maintain Customer Satisfaction:** Guarantees that no customer communication goes unattended, leading to a proactive follow-up.
- **Streamlined Workflow:** Automatically converts raw missed interactions into structured **tickets**, allowing supervisors and agents to easily review and prioritize follow-up actions.

Functionality:

The Ameyo solution for missed chats relies on a **Routing Rule** that detects the system's designation of a missed chat and triggers automatic ticket creation.

Example Scenario Workflow:

1. A customer attempts a chat (e.g., requesting a bill detail or subscription upgrade) but no agent is available to pick it up.
2. The chat interaction is designated by the system as "Missed Chat."
3. The configured **Missed Chat Routing Rule** detects the interaction's title.
4. A **ticket is automatically created** containing the customer's details and message content.
5. Supervisors and agents can later review this ticket, understand the request, and proactively contact the customer.

Result of Configuration:

Once the rule is configured, a ticket is automatically created for every missed chat. This allows supervisors and agents to:

- Review tickets of missed chats efficiently.
- Contact the relevant customers directly to provide support.
- Ensure every communication is attended to and resolved.

Prerequisites:

- **Administrator Access:** Required to configure routing rules in the Rule Engine.
- **Defined Campaigns and Queues:** The target interaction campaign and queue must be established for ticket assignment.

Usage Instructions:

Creating a Routing Rule for Missed Chats

Follow these steps to configure the rule that tracks missed chats and automatically creates tickets:

1. Navigate to **Rule Engine > Routing**.
2. Create a **new rule**.
3. Enter a **Rule Name** (e.g., "Auto-Ticket for Missed Chats") and a **Rule Description**.
4. **Add a Condition:**
    - **Condition:** Select **Interaction Title**.
    - **Operator:** Select **Contains**.
    - **Value:** Enter the exact phrase: Missed Chat from
5. **Add an Action:**
    - Select **Routing Action**.
    - **Configure the routing details:**
        - **Campaign Name:** Choose the appropriate Interaction Campaign.
        - **Queue Name:** Choose the target queue for missed chat tickets.

- **Assign To User:** Select the agent assignment type (e.g., *Available Agent*, *Any Agent*).

6. (Optional) Add multiple actions to route missed chats across different campaigns or queues based on additional conditions.
7. Click **Save** to activate the rule.

10.2. Social Media (Public Engagement)

10.2.1. Google Play Store

Overview

This integration allows a company to monitor and respond to customer reviews left on their application's page in the Google Play Store. It is an essential tool for managing the reputation of a mobile app and providing support to users who post about their issues in reviews.

How It Works

An administrator links the company's Google Play Developer account to the platform. When a user posts a new review, the system creates a ticket and routes it to the appropriate team. An agent or developer can then compose a reply within their console, and the response will be published publicly under the original review in the Play Store.

Use Cases

- **Technical Support:** A user leaves a 1-star review describing a bug. A support agent replies to the review, acknowledging the bug and offering to help via a support ticket.
- **Reputation Management:** A marketing manager publicly thanks users who leave positive 5-star reviews.

- **Feedback Collection:** A product manager analyzes reviews to identify common feature requests and pain points mentioned by users.

Benefits

- **Improves App Ratings:** Actively responding to reviews, especially negative ones, shows potential new users that the company is responsive and can lead to improved app ratings over time.
- **Direct User Support:** Provides a public channel to offer support to users who are experiencing issues with the app.
- **Enhances Brand Trust:** Demonstrates that the company listens to user feedback and is actively engaged in improving its product.

10.2.2. Youtube

Overview

This feature enables the contact center to monitor and respond to comments left on a company's YouTube videos. It allows community managers and support agents to engage with their audience, answer questions, and manage the brand's reputation directly on the video platform.

How It Works

An administrator links the company's YouTube channel to the platform. When a viewer leaves a comment on a video, the system creates a ticket and routes it to the social media queue. An agent can then reply to the comment directly from their agent console, and the reply will appear in the comment thread on YouTube.

Use Cases

- **Answering Product Questions:** A viewer asks a technical question in the comments of a "how-to" video, and a support agent provides a detailed answer.
- **Community Engagement:** A community manager replies to positive comments on a new product announcement video to thank the viewers.
- **Reputation Management:** An agent identifies a negative or spam comment and can hide it or reply to it appropriately.

Benefits

- **Builds Community:** Engaging with viewers in the comments section helps to build a loyal community around the brand's content.
- **Protects Brand Image:** Allows for the moderation and management of the public conversation happening on the company's videos.
- **Provides Direct Feedback:** YouTube comments can be a valuable source of direct customer feedback and ideas.

10.3. Messaging (Private Conversations)

10.3.1. Google Business Messages

Overview

Google Business Messages allows customers to start a messaging conversation with a business directly from Google Search results and Google Maps. It enables brands to connect with customers at the moment of discovery, providing a powerful channel for sales and support.

How It Works

When a customer finds a business on Google, they will see a "Chat" button on the business profile. Tapping this button initiates a message that is routed into the contact center as a new ticket. Agents can then respond with text, rich cards, and carousels, providing an interactive experience to answer questions or guide a purchase.

Configuration Steps

HUMAN REVIEW NEEDED: No information regarding specific UI steps for an Administrator to integrate Google Business Messages could be found in the provided user manuals.

Use Cases

- **Local Business Inquiries:** A customer finds a local restaurant on Google Maps and starts a chat to ask if they have outdoor seating.
- **Pre-Sale Questions:** A user searching for a product on Google starts a chat with a retail store to check if the item is in stock before visiting.
- **Customer Support:** A customer initiates a chat from a company's search result to get help with an order.

Benefits

- **Connect at the Point of Discovery:** Engages with customers at the very start of their journey, directly from Google Search and Maps.
- **Drives Local Business:** Provides a powerful tool for local businesses to answer questions and drive foot traffic.
- **Rich, Interactive Conversations:** Supports carousels and suggested replies, enabling a guided and visually appealing customer experience.

10.3.2. Whatsapp

WhatsApp integration enables businesses to communicate with customers on the world's most popular messaging app. This allows for rich, asynchronous conversations, providing a convenient and personal channel for support, notifications, and sales inquiries.

How It Works

An administrator integrates the company's WhatsApp Business Account with the system. When a customer sends a message to the company's WhatsApp number, a new ticket is created and routed to an available agent. The agent can then engage in a real-time or asynchronous conversation directly from their agent console.

Use Cases

- **Conversational Support:** A customer initiates a WhatsApp chat to troubleshoot a product, sending messages back and forth with an agent over a period of time.
- **Appointment Reminders:** An automated message is sent via WhatsApp to remind a customer of their upcoming appointment.
- **Order Updates:** A customer receives proactive notifications on WhatsApp about their order status, from confirmation to delivery.

Benefits

- **Enhanced Customer Convenience:** Allows customers to communicate using their favorite messaging app.
- **Rich and Personal Communication:** Supports a more conversational interaction style compared to traditional channels.
- **Asynchronous Communication:** Agents and customers can respond at their own pace, making it a highly efficient channel.

Customer Feedback Collection via AMF (4.13.11+)

Starting from version 4.13.11, WhatsApp supports **customer feedback collection** through the Ameyo Messaging Framework (AMF). After a conversation is resolved, an automated

feedback message (e.g., CSAT survey) can be sent to the customer over WhatsApp. Responses are captured and linked to the original ticket for reporting and quality analysis.

Version History

Version	Enhancement	Release Notes
4.13.11	WhatsApp customer feedback collection via AMF	

10.3.3. Instagram DM

Instagram Direct Message (DM) integration enables the contact center to handle private, one-on-one conversations with customers through Instagram. It's a key channel for brands that use Instagram for sales and customer engagement to provide personalized support.

How It Works

After connecting the company's Instagram Business account to the platform, incoming DMs are automatically converted into tickets and assigned to agents. Agents can manage these conversations from their primary desktop, responding to customer questions, resolving issues, and providing information within the familiar Instagram messaging interface.

Use Cases

- **Social Commerce:** A customer sends a DM to ask about the price and availability of a product featured in an Instagram Story.
- **Order Support:** A user DMs the company with a picture of a damaged item they received to initiate a return.
- **Influencer Management:** A marketing team uses the integrated DMs to manage conversations with influencers and brand partners.

Benefits

- **Drives Social Sales:** Allows sales agents to directly answer product questions and guide users to a purchase within a key sales channel.
- **Personalized Support:** Offers a direct and private line to customers for resolving issues or answering account-specific questions.
- **Efficient Management:** Prevents DMs from getting lost in the native app by routing them through a structured ticketing system.

Version History

Version	Enhancement	Release Notes
4.13	Instagram Direct introduced as a new chat source channel	

10.3.4. Twitter DM

Overview

Twitter Direct Message (DM) integration allows agents to manage and respond to private one-on-one conversations initiated by customers. This provides a secure and personal channel for support and sales on the Twitter platform.

How It Works

An administrator links the company's Twitter account to the platform. When a customer sends a Direct Message to the company's handle, the system creates a ticket and routes it to an agent. The agent can then engage in a private, back-and-forth conversation directly from their unified console, with the messages appearing in the customer's Twitter DM inbox.

Use Cases

- **Private Customer Support:** A customer DMs their account number and issue details to an agent for troubleshooting.
- **Sales Qualification:** After a public tweet exchange, a sales agent asks the prospect to "move to DMs" to discuss pricing and specific needs.
- **Information Gathering:** An agent uses DMs to securely collect a customer's shipping address or contact information.

Benefits

- **Enables Secure Conversations:** Provides a private channel to discuss sensitive account information that cannot be shared in public tweets.
- **Creates a Personal Connection:** One-on-one messaging allows for a more personal and direct support experience.
- **Maintains a Clean Public Feed:** Moves complex or account-specific support issues out of the public timeline, keeping the brand's feed clean.

10.3.5. FB Messenger

Overview

Facebook Messenger integration allows businesses to manage and respond to private messages sent to their Facebook Page. It provides a direct, one-on-one communication channel for customers seeking support or sales assistance on the Facebook platform.

How It Works

An administrator connects the company's Facebook Page to the platform. When a customer sends a private message to the Page's inbox, the system automatically creates a ticket and routes it to an agent. The agent can then conduct a private conversation with the customer from their unified console, with all messages appearing in the customer's Messenger app.

Use Cases

- **Private Customer Support:** A customer sends a private message with their order number to inquire about its status.
- **Sales Inquiries:** A potential customer sends a message to ask detailed questions about a product they saw in their feed.
- **Escalation Channel:** After a public comment, an agent asks the customer to "send us a private message" to resolve their specific issue with personal account details.

Benefits

- **Secure, Private Conversations:** Allows for the exchange of sensitive customer information (like order numbers or contact details) that cannot be shared publicly.
- **Seamless Transition from Public to Private:** Provides an easy way to move conversations from public comments to a private channel for resolution.
- **Centralized Message Handling:** Ensures that all private messages are handled through the structured ticketing system rather than being missed in the native Facebook inbox.

10.3.6. SMS

Overview

SMS (Short Message Service) integration allows agents to send and receive text messages from customers. It provides a simple, universal, and immediate channel for communication, ideal for notifications, reminders, and brief support interactions.

How It Works

The system is configured with a virtual phone number capable of sending and receiving SMS messages. When a customer sends an SMS to this number, it is converted into a ticket and routed to an agent. The agent can reply from their console, and the response is delivered as an SMS to the customer's mobile phone. Agents can also initiate outbound SMS messages.

Use Cases

- **Two-Factor Authentication (2FA):** Sending a one-time passcode to a customer's phone to securely verify their identity.
- **Status Alerts:** A customer receives an SMS notification that their support ticket has been updated or that their order has shipped.
- **Text-to-Support:** A customer sends a text message to a support number to create a ticket and communicate with an agent for simple issues.

Benefits

- **High Open Rates:** SMS messages have exceptionally high open rates, ensuring that important information is seen by the customer.
- **Universal Reach:** Nearly every mobile phone can receive SMS messages, making it one of the most accessible communication channels.
- **Speed and Brevity:** Perfect for delivering concise, time-sensitive information quickly and efficiently.

Limitations

- SMS is limited to 160 characters per message, making it unsuitable for complex conversations.
- Sending rich media (images, videos) requires MMS, which may be a separate configuration.

11. System Security and Compliance

11.1. Password Policy

Password policies let your organization control how strong local (platform) passwords must be, how often they expire, and whether old passwords may be reused. Policies are **scoped** (for example by **user type** and **hierarchy context** such as contact center) and can be **turned on or off** per scope. Several policy layers can apply together: composition (simple and complex rules), lifecycle and reuse (**enforce**), and extra string or identity checks (**regex** policy block—despite the name, it is driven by **substring** settings rather than a free-form regular expression field).

Users who sign in only through **SAML** or **Google** SSO still benefit from centralized IdP rules; this page covers **platform-stored passwords** used with **normal login** and password-change flows.

How It Works

1. An **administrator** (or deployment process) defines one or more **policy rows** for the right **context** and **user type** (for example Agent vs Administrator), and sets `enable` so the rules apply.
2. When a user **sets or changes a password** (including forced change after reset), the platform evaluates **each enabled policy type** that is registered for that user and aggregates any violations into a single error for the user.

3. **New users** may be created in a **“new”** state: on the next login the platform can require a **password change** before normal access, in addition to any expiry rules.
4. **Password history** rows (salted hashes) are written when passwords change; **reuse prevention** compares the candidate password against those stored values.

How policies combine

Policy kind (configuration name)	Purpose
Simple (`simpleConfigurationPolicy`)	Yes/no composition: required upper, lower, digit, special; optional **allow-list** of special characters; optional ban on **adjacent repeated** characters.
Complex (`complexConfigurationPolicy`)	Numeric **minimums** for length, uppercase, lowercase, digits, and special characters, plus **maximum** length.
Enforce (`enforceConfigurationPolicy`)	**Maximum age** (mandatory change), **minimum age** (early warning before expiry), and **reuse prevention** against password history.
Regex (`regexConfigurationPolicy`)	**Substring** rules: forbid user id or display name inside the password (case-insensitive), forbid listed strings, or require one configured substring.

All four can be enabled independently for the same user type where your deployment supports it. Composition checks (**simple** and **complex**) typically run together when both are enabled.

Simple password policy

Stored in the `simple_password_policy` data (linked from `password_policy_detail`).

Field / parameter	Meaning	Behaviour when enforcing
`allowed_special_character`	Allow-list text	If **non-empty**, every **non-alphanumeric** character in the password must appear in this list. If **empty**, no allow-list restriction is applied by this rule.
`required_uppercase_letter`	Boolean	At least **one** Latin uppercase letter (`A` – `Z`).
`required_lowercase_letter`	Boolean	At least **one** Latin lowercase letter (`a` – `z`).
`required_number`	Boolean	At least **one** digit (`0` – `9`).
`required_special_character`	Boolean	At least **one** character that is **not** a digit or Latin letter (any other symbol qualifies as “special” here).
`allow_repeated_character`	Boolean	If **false**, the password must **not** contain the **same character twice in a row** (no `aa` , `11` , `@@` , etc.).
`allow_anagram`	Boolean	Stored with the policy record for compatibility. It is **not** evaluated during standard password validation in current product logic—do **not** rely on it to block anagrams of old passwords unless your release notes state otherwise.

Typical validation messages users may see include reminders to use allowed specials, at least one small letter, one capital letter, one numeric value, one special character, or that the password contains repeated characters.

Complex password policy

Stored in `complex_password_policy`.

Field / parameter	Meaning	How it is checked
`min_pwd_length`	Minimum length	Password length must be **≥** this value.
`max_pwd_length`	Maximum length	Password length must be **≤** this value.
`min_number_allow`	Minimum digits	Count of `0`–`9` in the password.
`min_special_character_allow`	Minimum “special”	Count of characters **not** matching `[0-9A-Za-z]`.
`min_lowercase_character_allow`	Minimum lowercase	Count of `a`–`z` after non-letters are stripped from consideration (same family of rules as simple policy).
`min_uppercase_character_allow`	Minimum uppercase	Count of `A`–`Z` in the same sense.

If any bound fails, the user receives guidance that length or character counts are below the configured minimums (wording may vary slightly by deployment).

Enforce password policy

Stored in `enforce_password_policy`. Works together with `user_password_history` (prior salted hashes per user).

Field / parameter	Meaning	Behaviour
`max_pwd_age`	Days	Uses the **most recent** password change timestamp from history. If the password is **older than** this many **whole-day** buckets (see rounding below), login / expiry handling treats it as **expired** and the user must change password.
`min_pwd_age`	Days	After the password is **older than** this threshold (and still within `max_pwd_age`), the user may receive a **warning** that the password **will expire** in a shown number of days (derived from `max_pwd_age` and age).
`disallow_previous_password`	Integer	When **non-zero**, reuse prevention is **on**: the new password is hashed and compared to **each** password history entry the platform still holds for that user in its active configuration cache; a match rejects the change. Values **greater than 20** are **stored capped at 20** in one code path, but the comparison itself does **not** stop after *n* rows—it evaluates **all** cached history rows for that user. Plan retention and audits accordingly. Setting the field to **0** disables this reuse check (other rules may still apply).
`pwd_grace_value`	Integer	Present in the schema for compatibility; **not** used by password logic—leave unset or ignore.

Reuse and `max_pwd_age`: When reuse prevention is on **and** `max_pwd_age` is set, the platform also rejects a password whose hash matches a password that was set within the **last** `max_pwd_age` **days** (in addition to the general history scan).

User state “new”: If the account is still in a **new** user state, the expiry path can respond with a **force change password** outcome so the first platform password meets policy.

Rounding: Age in days is derived from calendar time difference; partial days are rounded **up** when deciding whole-day age for expiry, so behaviour matches “full days since last change.”

Regex password policy (substring and identity rules)

Stored in `regex_password_policy`. The name reflects legacy wording; operators configure **plain substrings**, not a regular-expression editor.

Field / parameter	Meaning	Behaviour
`disallow_user_id`	Boolean	If true, the password must **not** contain the user's **login id** as a substring (**case-insensitive**).
`disallow_user_name`	Boolean	If true, the password must **not** contain the user's **display name** as a substring (**case-insensitive**).
`exclude_strings`	Text	**Comma-separated** list of forbidden fragments. If the password **contains** any listed fragment (**case-sensitive** match), it is rejected. Example: `password,123456,welcome` forbids those exact substrings.
`contain_substring`	Text	If non-empty, the password **must include** this exact substring (**case-sensitive**). Only **one** required phrase is supported in this field (not a list).

Master policy row

`password_policy_detail` links everything to `user_type`, `context`, `context_id`, a `name`, and `enable`. Each enabled row can have child rows in the simple, complex, enforce, and regex tables as your deployment defines.

Configuration parameters

Use these **policy type identifiers** when integrating with configuration APIs or exports that list password policy blocks. Exact **UI navigation** depends on your edition (on-prem

Administrator vs cloud configuration portal); map these keys in your **user / security / password** settings area for the right **hierarchy** and **user type**.

Key / parameter	Description	How to configure	Constraints / allowed values	Sample
`simpleConfigurationPolicy`	Simple composition toggles and optional special-character allow-list.	Enable per **user type** + **context**; edit `simple_password_policy` fields (or equivalent UI).	Booleans `true` / `false`; allow-list is a string of permitted special characters; empty allow-list disables allow-list filtering.	`required_number=true`, `allowed_special_character=@#$%`
`complexConfigurationPolicy`	Minimum counts and password length bounds.	Same scope as simple; edit `complex_password_policy`.	Non-negative integers; `min_pwd_length` ≤ `max_pwd_length`.	`min_pwd_length=12`, `min_number_allow=2`
`enforceConfigurationPolicy`	Age, warning, reuse.	Same scope; edit `enforce_password_policy` and ensure history retention matches compliance goals.	Ages in **days**; `disallow_previous_password` **0** = off, **non-zero** = on (stored value may cap at **20**, but checks use **all** retained history rows); `pwd_grace_value` unused.	`max_pwd_age=90`, `min_pwd_age=80`, `disallow_previous_password=5`
`regexConfigurationPolicy`	Substring / identity rules.	Same scope; edit `regex_password_policy`.	Comma-separated `exclude_strings`; single `contain_substring`; booleans for id/name checks.	`exclude_strings=companyname,welcome`

Configuration steps (administrator checklist)

1. Decide **which user types** (for example agents, supervisors, administrators) need stricter rules.
2. Identify the correct **hierarchy context** (for example contact center or tenant) where policy is defined for your product edition.
3. Create or update `password_policy_detail` with `enable = true` for that combination.
4. Fill **simple** and/or **complex** rows if you need composition rules.
5. Fill **enforce** if passwords must **expire** or **cannot repeat**; confirm **password history** is populated on change.
6. Fill **regex** row if you must block **company names**, **default passwords**, or forbid **user id / name** fragments.
7. Test with a **non-production** user: set passwords that should **pass** and **fail** each rule and confirm messages are acceptable for your agents.

Show / Hide Password (Eye Icon)

Starting from version 4.13.3, a **show/hide toggle** (eye icon) is available on the `/app` and toolbar login screens, allowing users to reveal or hide their password while typing. In version 4.13.4, this was extended to **all password fields** throughout the UI.

User ID and Username Character Restrictions

Starting from version 4.13.4.8, administrators can enforce character restrictions on user IDs and usernames via two configurable regex flags in the `server_preference_store` at the **contact center** level:

- `allowed_userId_regex` – Restricts which characters are accepted when creating or updating a user ID.
- `allowed_username_regex` – Restricts which characters are accepted for usernames.

These constraints apply to both individual user creation/update in the UI and bulk user uploads.

Limitations and notes

- `allow_anagram` is **not** enforced by the standard validator despite appearing in the schema.
- `pwd_grace_value` is **unused**.
- `disallow_previous_password`: effective ceiling **20**; behaviour depends on **how many** history rows exist for the user.
- **SSO users** may rarely set a local password; strongest guarantees come from the **IdP** for SAML/Google.
- **MFA**: Release notes reference password policy alignment with MFA—keep MFA and local policy coordinated.
- **Cloud vs on-prem**: Behaviour and UI entry points should be confirmed for your specific release; configuration keys above align with shared service naming.

Related topics

- **User Login & Single Sign-On (SSO)** — **Normal login** (platform User ID and password), **SAML**, and **Google** SSO; password policies apply to local passwords and complement IdP rules for SSO users.
- **Administrator Login** / **Supervisor Login** — Where login options appear for each persona.
- **Login – Logout** (reporting) — Audit of sign-in and sign-out events.

Version History

Version	Enhancement	Release Notes
4.13.3	Show/hide password eye icon on `/app` and toolbar login screens	
4.13.4	Eye icon extended to all password fields in the UI	
4.13.48	Configurable `allowed_userId_regex` and `allowed_username_regex` at contact center level	**Contact Center - Patch Release Notes - Version 4.13.48**

11.2. Two-Factor Authentication (2FA)

Two-Factor Authentication (2FA) adds an extra layer of security to the contact center login process. When enabled, users must provide both their standard credentials (User ID and password) and a one-time password (OTP) to complete login. This significantly reduces the risk of unauthorized access from compromised passwords.

How It Works

1. The user enters their **User ID** and **Password** on the login page and clicks **Login**.
2. If 2FA is enabled for that user type and contact center, the platform generates a **one-time password (OTP)** and delivers it to the user's registered email address.
3. The user enters the OTP into the verification prompt.
4. The platform validates the OTP and, if correct, grants access to the console.

Prerequisites

- 2FA must be enabled by the administrator for the relevant user type(s) and contact center.
- Users must have a valid, accessible email address registered in the system for OTP delivery.
- Email delivery infrastructure (SMTP) must be configured and operational.

Limitations

- OTP delivery depends on email infrastructure availability; delays in email delivery can affect login speed.
- 2FA currently supports email-based OTP; hardware tokens and authenticator apps are not supported.

Version History

Version	Enhancement	Release Notes
4.13	Introduced OTP-based two-factor authentication (UserID + password + OTP)	**ECC Release Notes 4.13**
4.13.37	Email OTP package updated for PHP 8.x compatibility	**Contact Center - Patch Release Notes - Version 4.13.37**

11.3. Custom Domain and IP Whitelisting

Overview

By default, Exotel Contact Center agents can access their workspace from any location using a shared Exotel domain (e.g., in1.cc.exotel.com). While convenient, organizations with strict data security and compliance requirements often need tighter control over where and how their data is accessed.

Custom Domain and IP Whitelisting is an advanced security feature designed to protect your Exotel workspace from unauthorized access and data leakage. It allows you to lock down your contact center environment so that agents can only log in via a dedicated custom domain and when connected to a trusted network—such as a physical office or a secure corporate VPN.

Key Features & Benefits

- **Dedicated Workspace Domain:** Move away from the generic login portal. Your team will access Exotel via a custom, tenant-specific subdomain (e.g., yourcompany.exotel.com).
- **Strict IP Whitelisting:** Enforce network-level security. Your workspace will only accept traffic from a pre-approved "Allowlist" of IP addresses, automatically blocking login attempts originating from outside your trusted networks.
- **Compliance Readiness:** Easily meet industry regulations and internal security policies regarding data privacy and authorized access.

How It Works

Once configured is activated for a tenant:

User Experience:

1. **Access:** Contact Center users navigate to your new dedicated URL (e.g., yourcompany.exotel.com).
2. **Verification:** The system instantly verifies that the user belongs to the tenant associated with the custom domain and checks their network connection against your IP Allowlist.

3. **Approved Login:** If connected to an approved office network or VPN, the user logs in normally and accesses the workbench.
4. **Blocked Login:** If the user is off-network (e.g., home Wi-Fi, public cafe) or attempts to use the generic shared domain, the login is immediately blocked.

Important Considerations

Static IPs Required: To use the IP Whitelisting feature effectively, your organization must use Static Public IPs. If your internet service provider dynamically rotates your IP addresses, your agents may inadvertently lose access when the IP changes.

How to Enable and Manage

Because setting up a custom subdomain and IP rules requires precise configuration to ensure your agents are not accidentally locked out, the initial setup and ongoing management are handled entirely by the Exotel team.

To enable Enterprise Access Control for your workspace or to update your existing IP Allowlist, please reach out to Exotel Support or your Customer Success Manager (CSM). They will guide you through the process and help secure your tenant.

12. Customer Experience

12.1. Live Chat

12.1.1. Configure and Initiate LiveChat

LiveChat Walk Through :

Google Drive (Click Here to play the video in a new tab)

LiveChat is a help desk solution that helps customers to connect with Support agents in real-time. When a customer is asking queries in a chatbot, there could be a query that the chatbot cannot answer. In cases like these, instead of leaving a customer with unresolved queries, LiveChat enables them to connect with a real-time agent who is better equipped to answer all their questions.LiveChat automates the process of assigning customers to the Support agents. Thus, your customers need not wait every time they need a query answered.

In Livechat there are three levels:

1. **Admin**- Admin supervises that everything is working properly and can export reports.
2. **Supervisor- Supervisor supervises that everything is working properly.**
3. **Agent - Agent helps in resolving customer queries in real time.**

Feature name	Definition
How to trigger LiveChat?	Customers can choose to “Chat with an expert” intent and submit their request by filling the required information to connect to the LiveChat agent.

Customers can choose to “Chat with an expert” and submit their request.

To submit a request, customers have to provide their details such as Name, Email Address, Mobile Number, and the Category of the query that they have.

After submitting their request, customers are automatically assigned to a LiveChat agent based on the category of their query.End chat button is placed above the text area so that the user can end the chat by clicking it.

Once the LiveChat conversation between customer support agent and customer is completed and the chat is disposed of by the agent a LiveChat NPS is visible at customer’s end.

12.1.2. Admin

Chat History

Feature name	Definition
Chat History	LiveChat Admin can view the complete Chat History of all the agents across all categories.They can view details about Customer, LiveChat Agent, Bot name, Category of the query, NPS, Start and End Date, and Duration of the chat. The complete chat history can also be viewed here.Real Time Chat ViewingThe chat window between agent and customer is live with the help of which the supervisor/admin can view chats in real time. Supervisor/Admin Comment on Real TimeA dedicated functionality is provided for Supervisors and Admin to comment on any message of an Agent and end-user. These comments would only be visible to the Agent and not the end-user. Surfing chat history made it easy.

VOIP

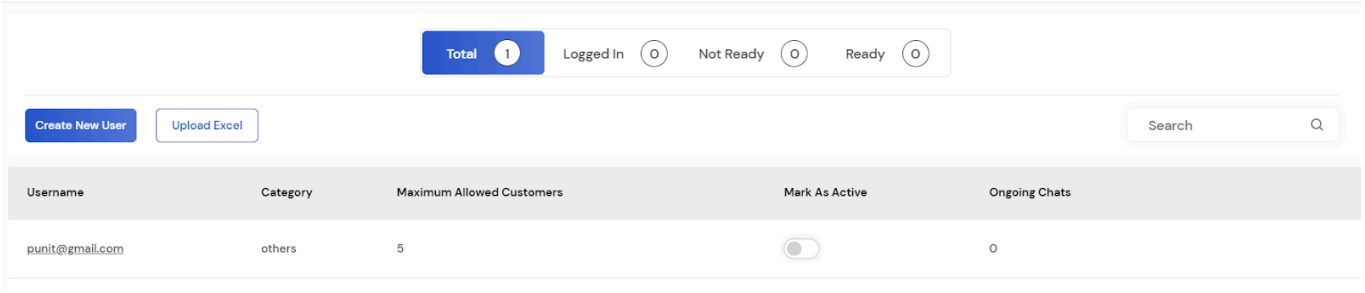
Feature Name	Definition
General settings	Enable VOIP In LiveChat

Manage Users

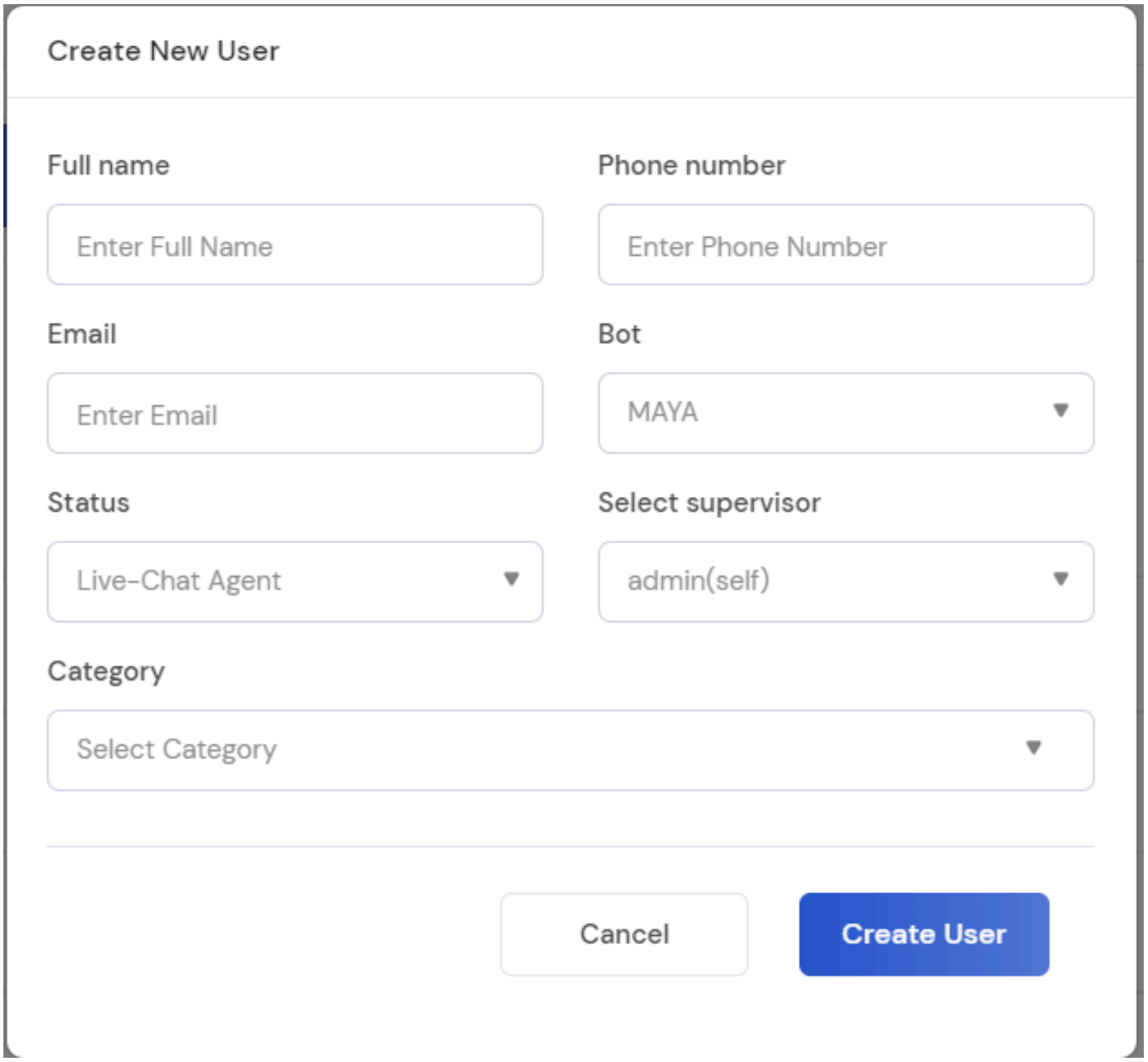
Feature name	Definition
Manage Users	LiveChat Admin can view details about all the agents reporting to him. A filter is available where the LiveChat Admin can see the list of Total Agents, Logged In Agents, Not Ready agents, Ready agents.The Admin can either create or delete an agent. After creating an agent, the Admin even has the ability to edit certain details about the agent. Livechat Admin can create users using an Excel sheet as well.

12.1.2.1. Manage Users

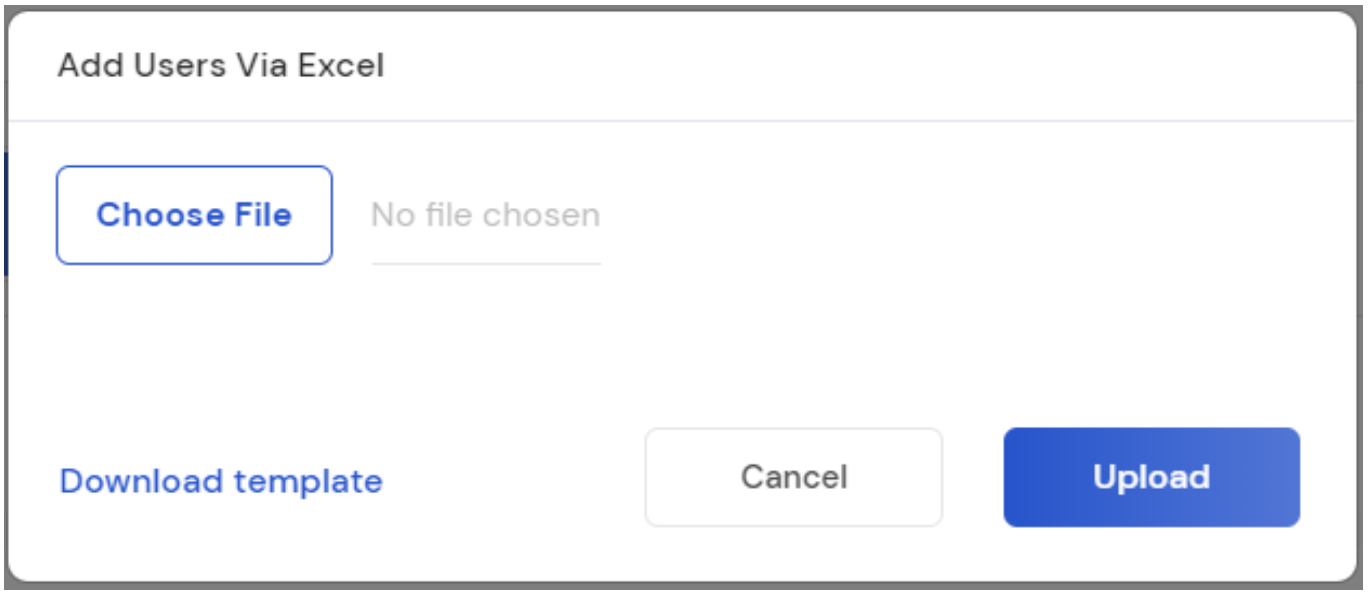
In the tab “Manage Users”, the LiveChat Admin can view details about all the agents reporting to him. A filter is available where the LiveChat Admin can see the list of Total Agents, Logged In Agents, Not Ready agents, Ready agents. Livechat admin can also customize the individual agents capacity.



The Admin can either create or delete an agent. After creating an agent, the Admin even has the ability to edit certain details about the agent.



Additionally, the Admin can even add agents by uploading an Excel sheet



To create users from an Excel sheet, the following steps are to be followed

- Firstly, the admin has to download the template which has been provided
- Fill in the necessary details details
    - For the Status column, the Admin has to enter **1 for Admin**, **2 for Supervisor**, and **3 for Agent**.
    - For the Bot column, the Admin has to enter the **Bot ID** associated with the respective bot.
    - For the Category column, the Admin has to enter the category which the admin wants to assign the agent
    - For the maximum customer count capacity if the LiveChat admin specifies any specific value will be assigned to the agent or default value will be considered.

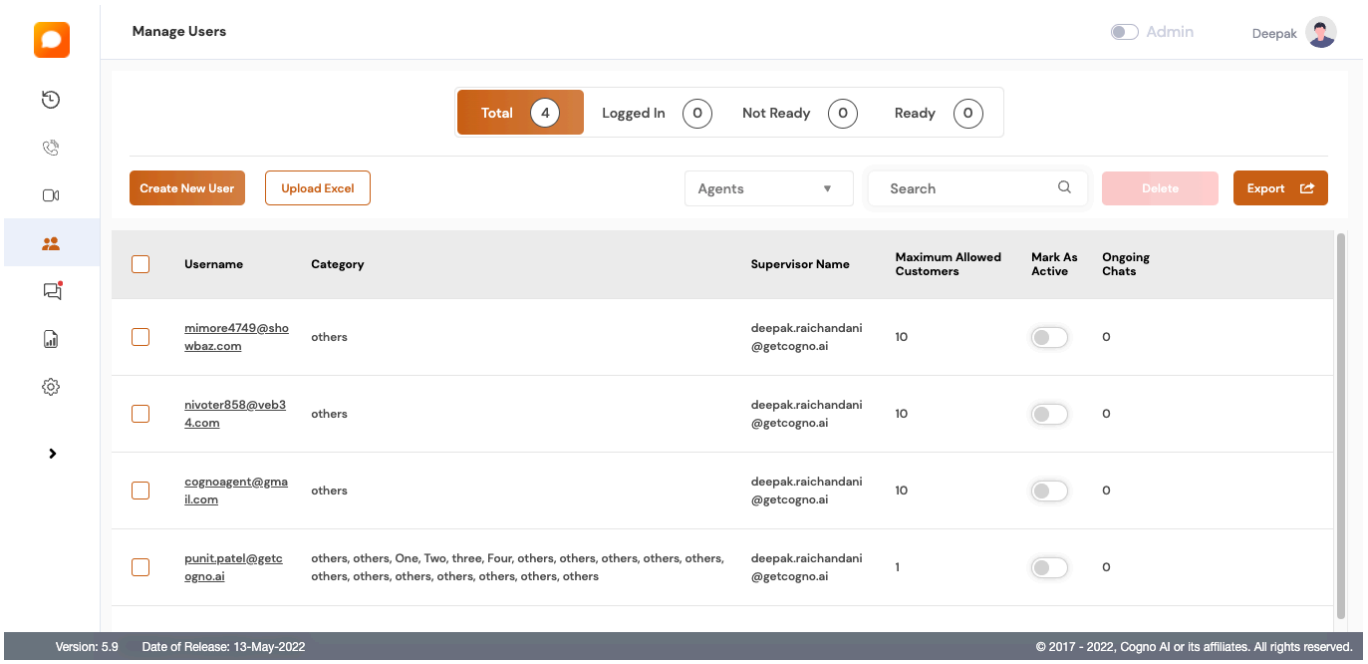
FirstName	LastName	Phone No.	Email ID	Password	Status ID (2 for Supervisor, 3	Bot ID	Category Name	Supervisor (comma seperated	Maximum Customers Allowed
Punit	Patel	9874563210	Punit@gmail.com	Punit@123	3	1	Services	admin	5

Details about the Agents such as Username, Name, Type, Bot, Mobile No., Category are displayed.

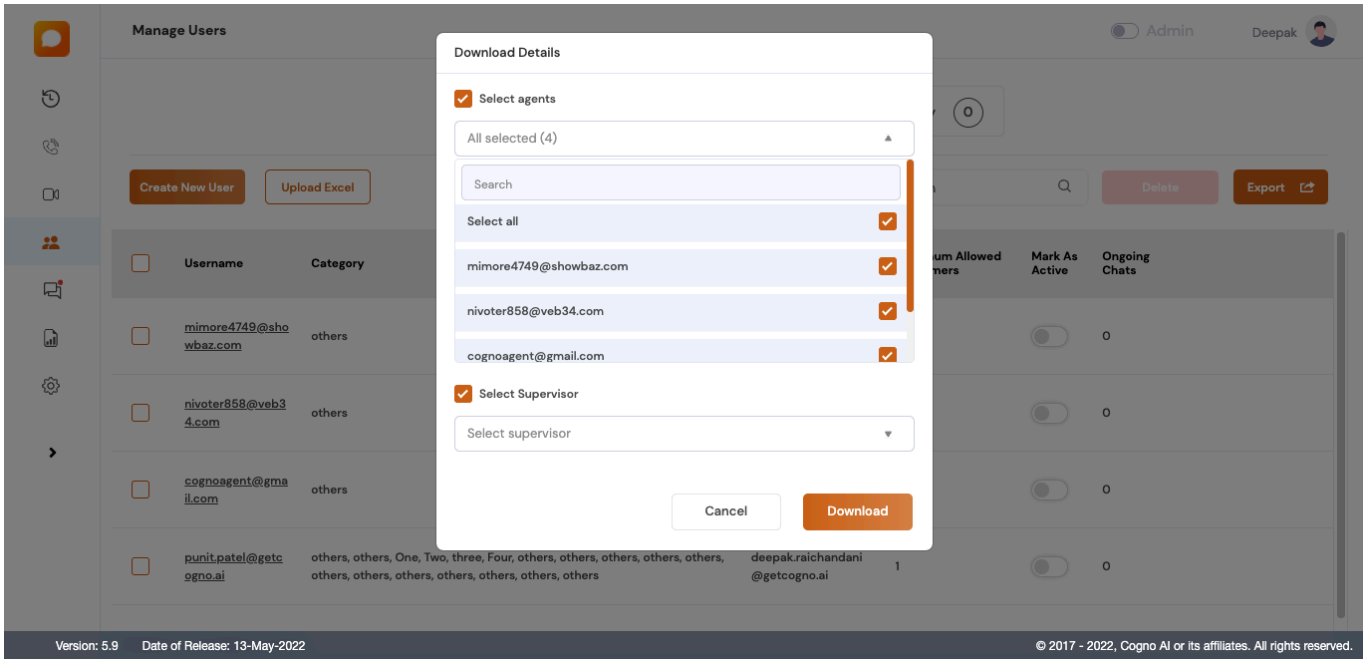
Export Button in the Manage Users section

LiveChat product consists of a Manage User section for Admins and Supervisors, from where they can add more users for either Agent role or other Supervisors. Until now, there was no provision to export this list. This export feature would be introduced in this sprint as well.

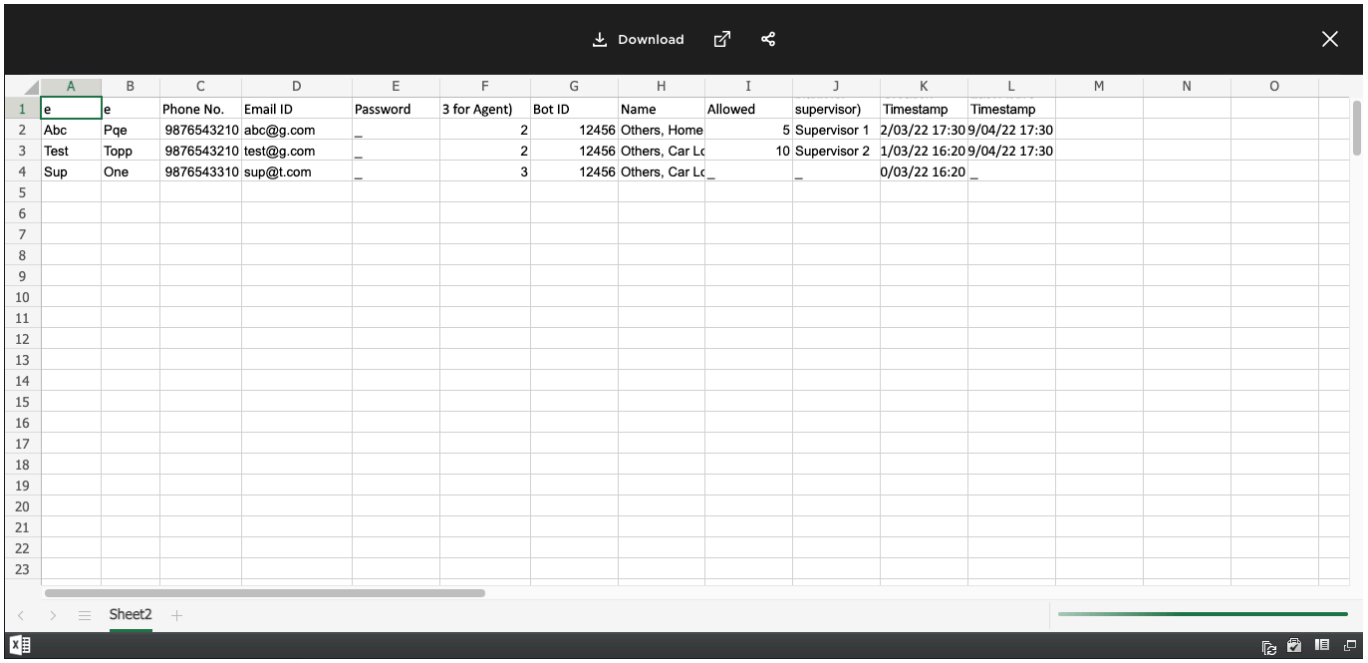
To configure : This is visible under : LiveChat (Admin Console) > Manage User



Clicking on Export will allow the user to select a category for which they wish to export the data for i.e Agent/ Supervisor. Once selected the category they can also select the agent they want the data for.



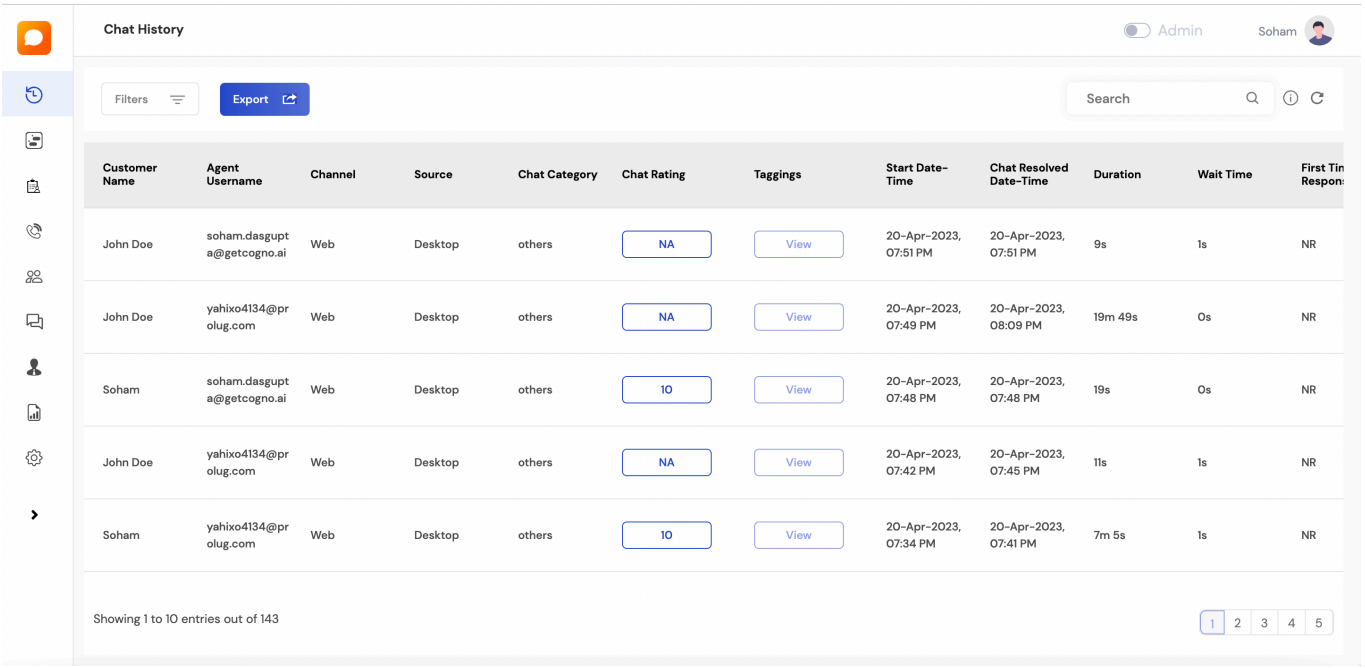
The downloaded report will look like the image attached below:



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	e	e	Phone No.	Email ID	Password	3 for Agent)	Bot ID	Name	Allowed	supervisor)	Timestamp	Timestamp			
2	Abc	Pqe	9876543210	abc@g.com	_	2	12456	Others, Home	5	Supervisor 1	2/03/22 17:30	9/04/22 17:30			
3	Test	Topp	9876543210	test@g.com	_	2	12456	Others, Car Lo	10	Supervisor 2	1/03/22 16:20	9/04/22 17:30			
4	Sup	One	9876543310	sup@t.com	_	3	12456	Others, Car Lo	_	_	0/03/22 16:20	_			

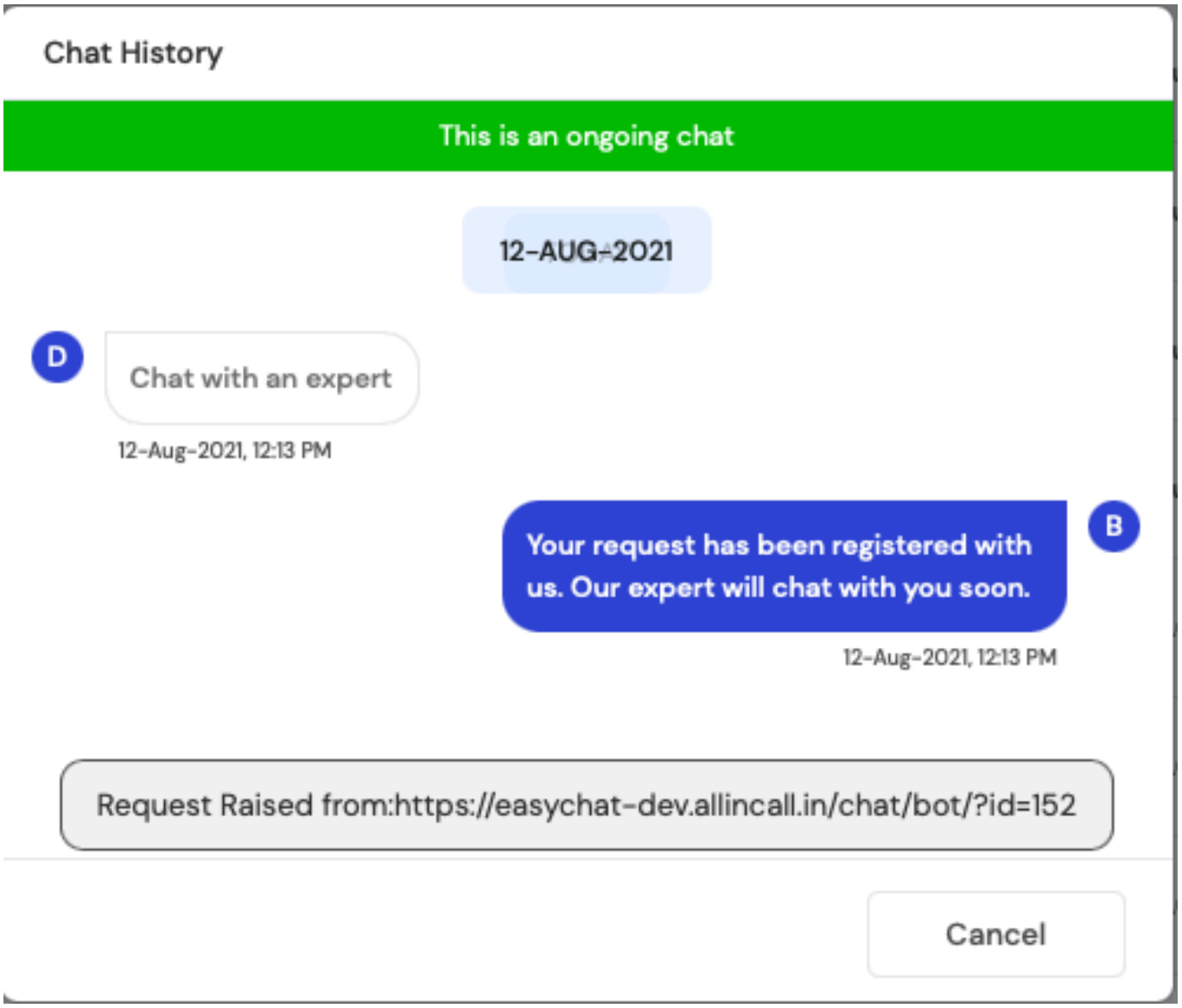
12.1.2.2. Chat History

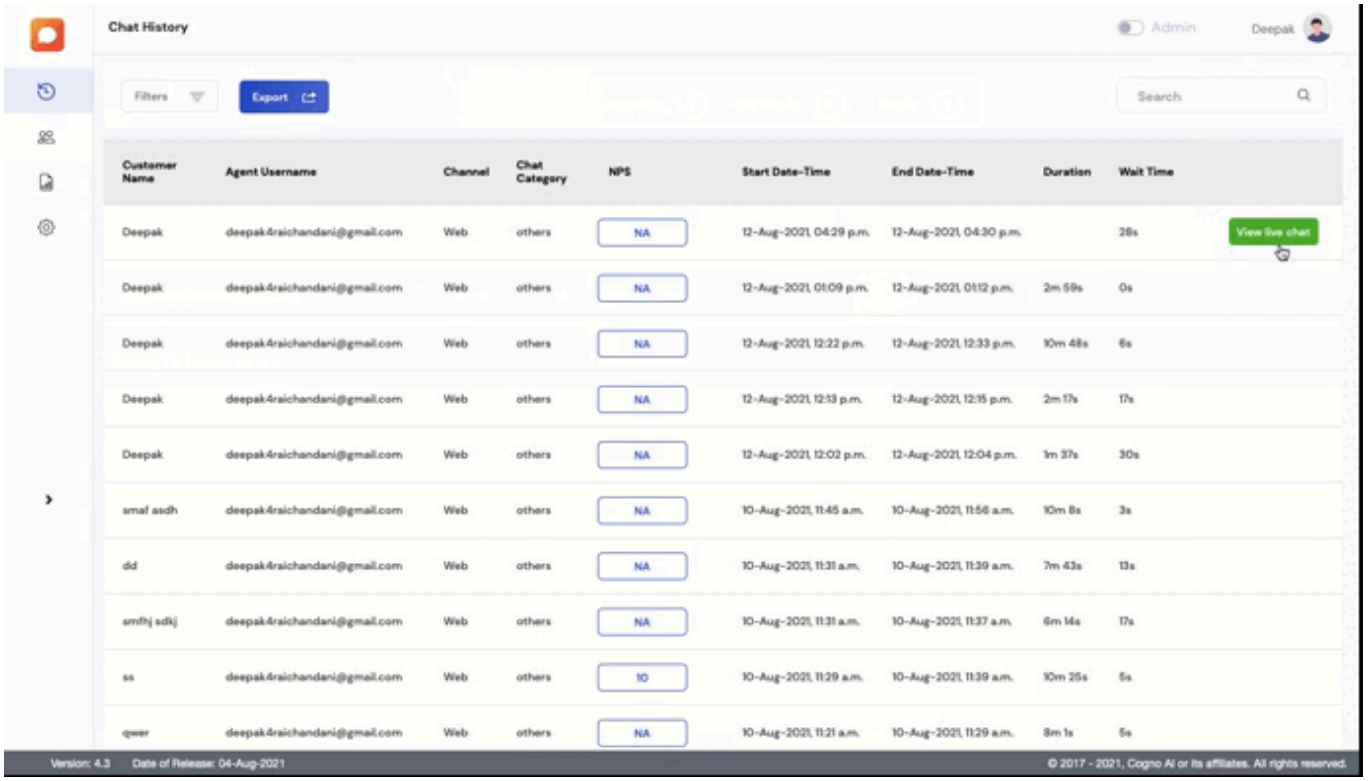
In “Chat History”, LiveChat Admins can view the complete Chat History of all the agents across all categories.They can view details about Customer, LiveChat Agent Username, Channel, Category of the query, Chat Rating, Start and End Date, wait time, First Response Time, Duration of the chat and Chat Termination Data. The complete chat history can also be viewed here.Note: The chat history page is with realtime updates. All Real-time chats of agents can be efficiently viewed by supervisors.



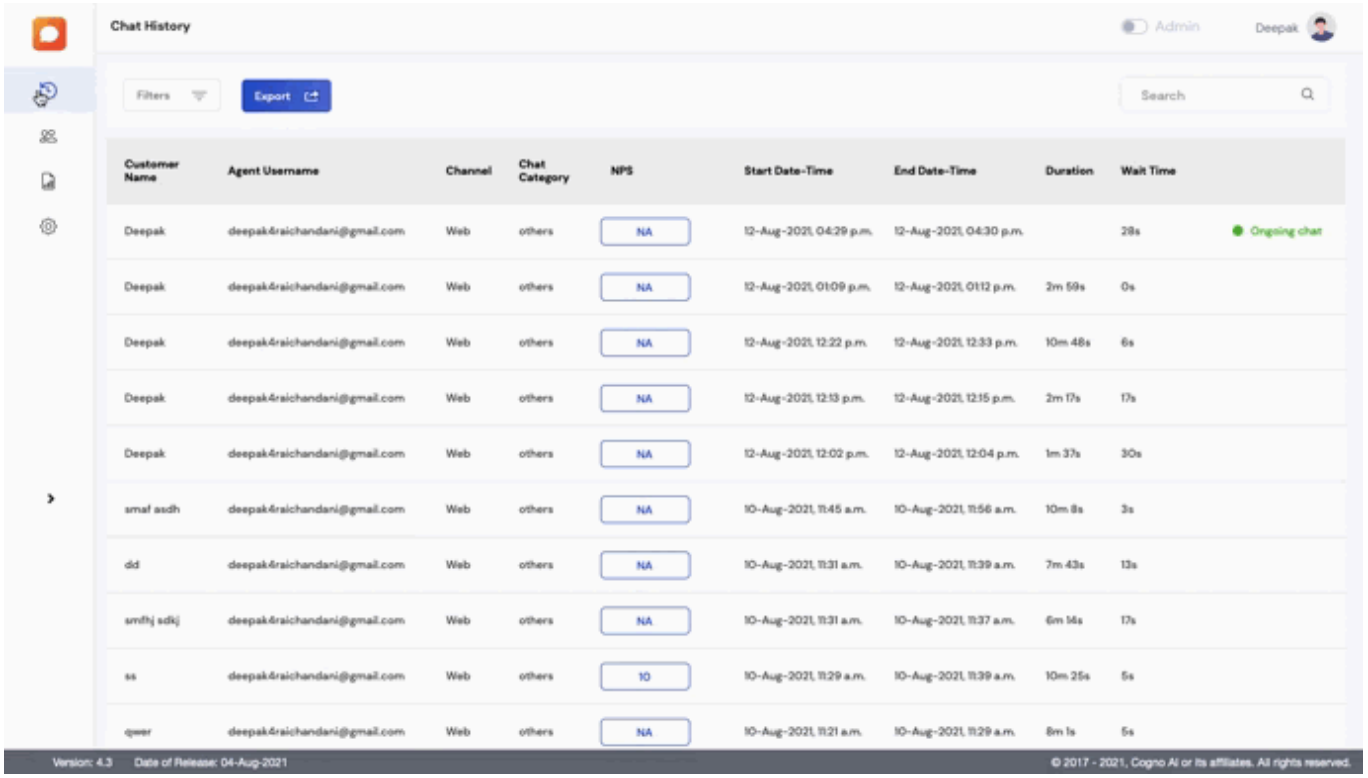
Real Time Chat Viewing

The chat window between agent and customer is live with the help of which the supervisor/admin can view chats in real time. Note: On the dashboard of the supervisor the “Ongoing Chat” will be visible as shown below. By clicking on the “**View Live Chat**” he will be able to see the specific chats that are going on between that particular agent and customer in realtime.


Chat History
This is an ongoing chat
12-AUG-2021
D
Chat with an expert
12-Aug-2021, 12:13 PM
Your request has been registered with us. Our expert will chat with you soon.
B
12-Aug-2021, 12:13 PM
Request Raised from:https://easychat-dev.allincall.in/chat/bot/?id=152
Cancel


Chat History
Admin
Deepak
Filters
Export
Search
Customer Name
Agent Username
Channel
Chat Category
NPS
Start Date-Time
End Date-Time
Duration
Wait Time
Deepak
deepak4raichandani@gmail.com
Web
others
NA
12-Aug-2021, 04:29 p.m.
12-Aug-2021, 04:30 p.m.
28s
View live chat
Deepak
deepak4raichandani@gmail.com
Web
others
NA
12-Aug-2021, 01:09 p.m.
12-Aug-2021, 01:12 p.m.
2m 59s
0s
Deepak
deepak4raichandani@gmail.com
Web
others
NA
12-Aug-2021, 12:22 p.m.
12-Aug-2021, 12:33 p.m.
10m 48s
6s
Deepak
deepak4raichandani@gmail.com
Web
others
NA
12-Aug-2021, 12:13 p.m.
12-Aug-2021, 12:15 p.m.
2m 17s
17s
Deepak
deepak4raichandani@gmail.com
Web
others
NA
12-Aug-2021, 12:02 p.m.
12-Aug-2021, 12:04 p.m.
1m 37s
30s
smaf asdh
deepak4raichandani@gmail.com
Web
others
NA
10-Aug-2021, 11:45 a.m.
10-Aug-2021, 11:56 a.m.
10m 8s
3s
dd
deepak4raichandani@gmail.com
Web
others
NA
10-Aug-2021, 11:31 a.m.
10-Aug-2021, 11:39 a.m.
7m 43s
13s
smfhj sdkj
deepak4raichandani@gmail.com
Web
others
NA
10-Aug-2021, 11:31 a.m.
10-Aug-2021, 11:37 a.m.
6m 14s
17s
ss
deepak4raichandani@gmail.com
Web
others
10
10-Aug-2021, 11:29 a.m.
10-Aug-2021, 11:39 a.m.
10m 25s
5s
qwer
deepak4raichandani@gmail.com
Web
others
NA
10-Aug-2021, 11:21 a.m.
10-Aug-2021, 11:29 a.m.
8m 1s
5s
Version: 4.3
Date of Release: 04-Aug-2021
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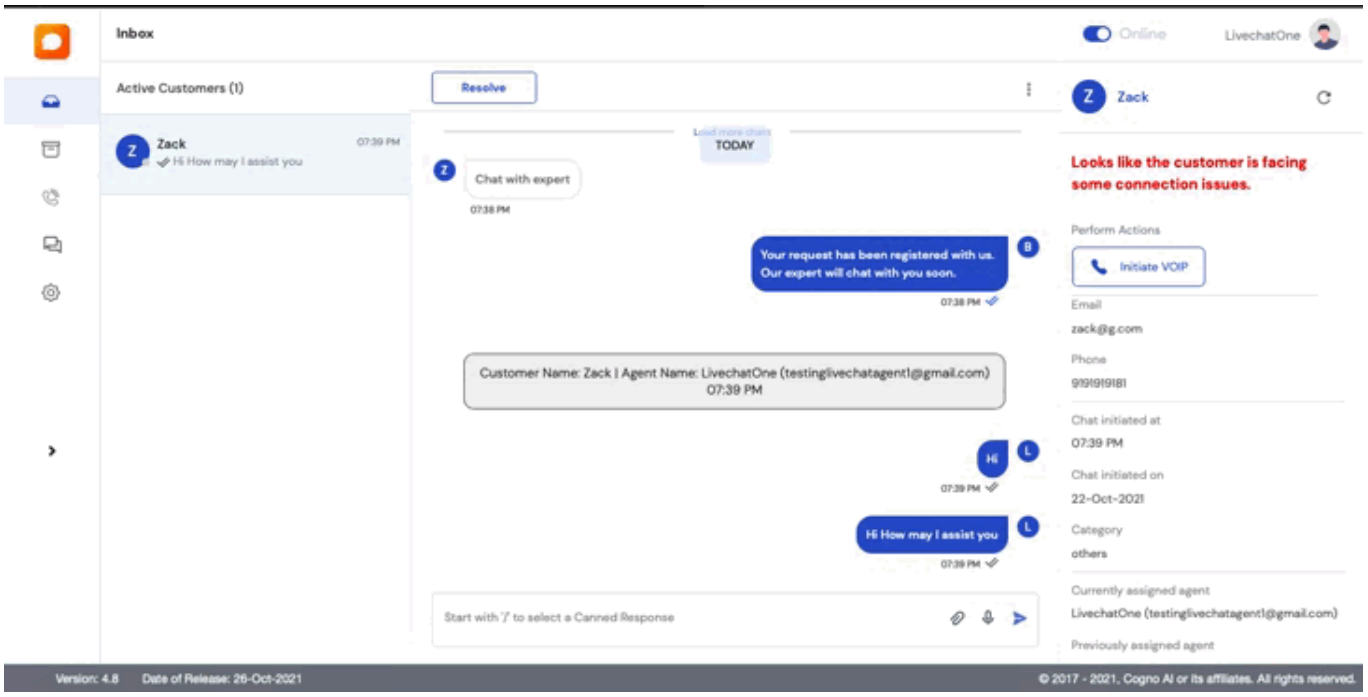
Demo for the same is shown below



Supervisor/Admin Comment on Realtime

A dedicated functionality is provided for Supervisors and Admin to comment on any message of an Agent and end-user. These comments would only be visible to the Agent and not the end-user.

This is visible unders Chat history (Supervisor/Admin Side) > Ongoing LiveChat



For an ongoing live chat of an agent (highlighted in the Chat History section by a visual indicator), the supervisor can comment on the agent's message to the user.

By clicking on the Reply Privately present below the message, the Supervisor can type in their comment. These messages will be visible to the agent on their chat window with the end-user as well as on their one-on-one chat window (for both supervisor and agent).

Note : These messages will not be visible to the customer.

Agent Side - When they are in the middle of a conversation with the end-user, they can receive comments/feedback about a message they had sent to the end-user, from an Admin or a Supervisor.

When the agent clicks on the comments made by the Supervisor (At the Active Customer screen), they are redirected to the One on One conversation with the resp. Supervisor.

Refer the below given links for demo for better understanding :Supervisor Comment on Ongoing Chat - LinkSurfing on chat history :

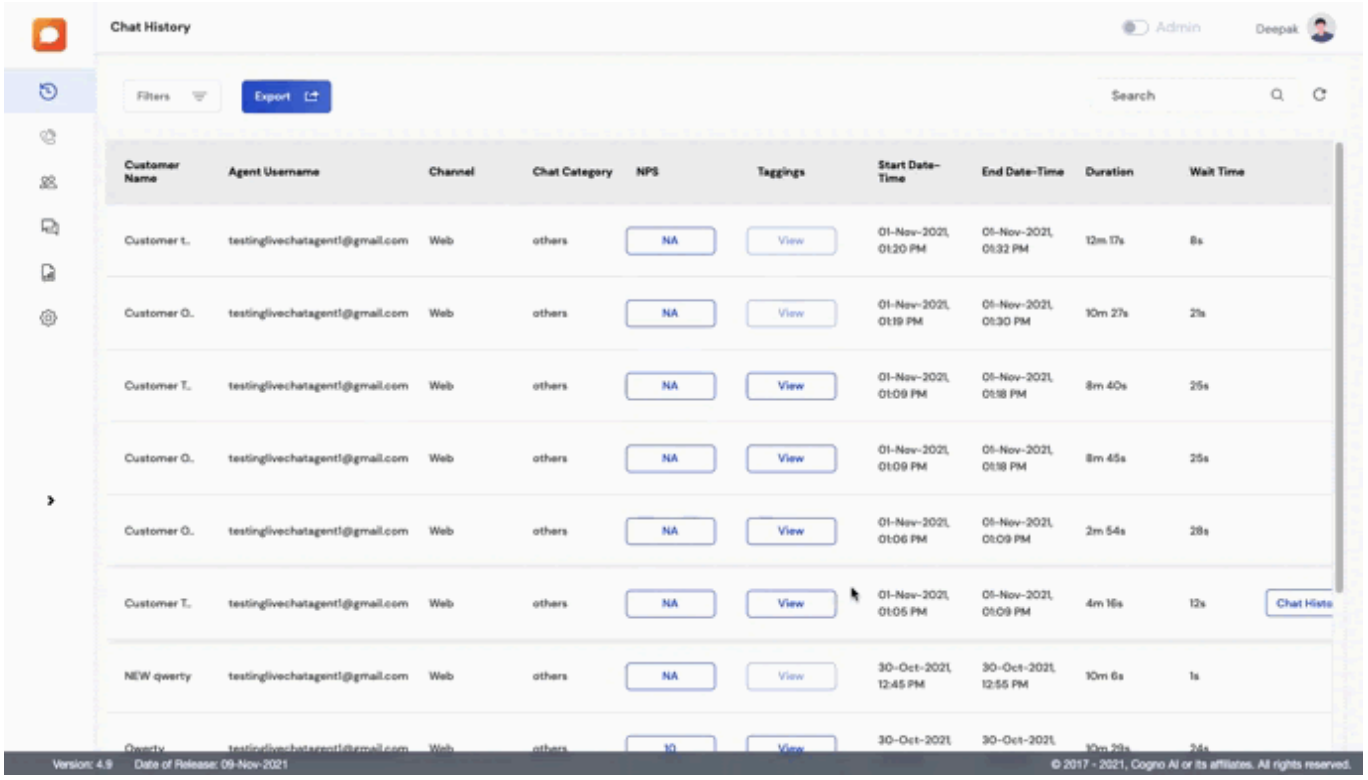
Providing "Previous" and "Next" arrow buttons on the modal buttons for users to navigate through the conversations with ease. Now the users can navigate to a different conversation without having to close the open modal, by clicking on the "Next" or "Previous" icon.

This is visible unders Cogno LiveChat > Admin Side > Chat History

And

Cogno LiveChat > Agent Side > Archived ChatsRefer the below given demo for better understanding

Admin Side (Chat History)



Agent Side (Mobile View)



Agent

Online



Search



Filters



Customer Name

instagram_..

NPS

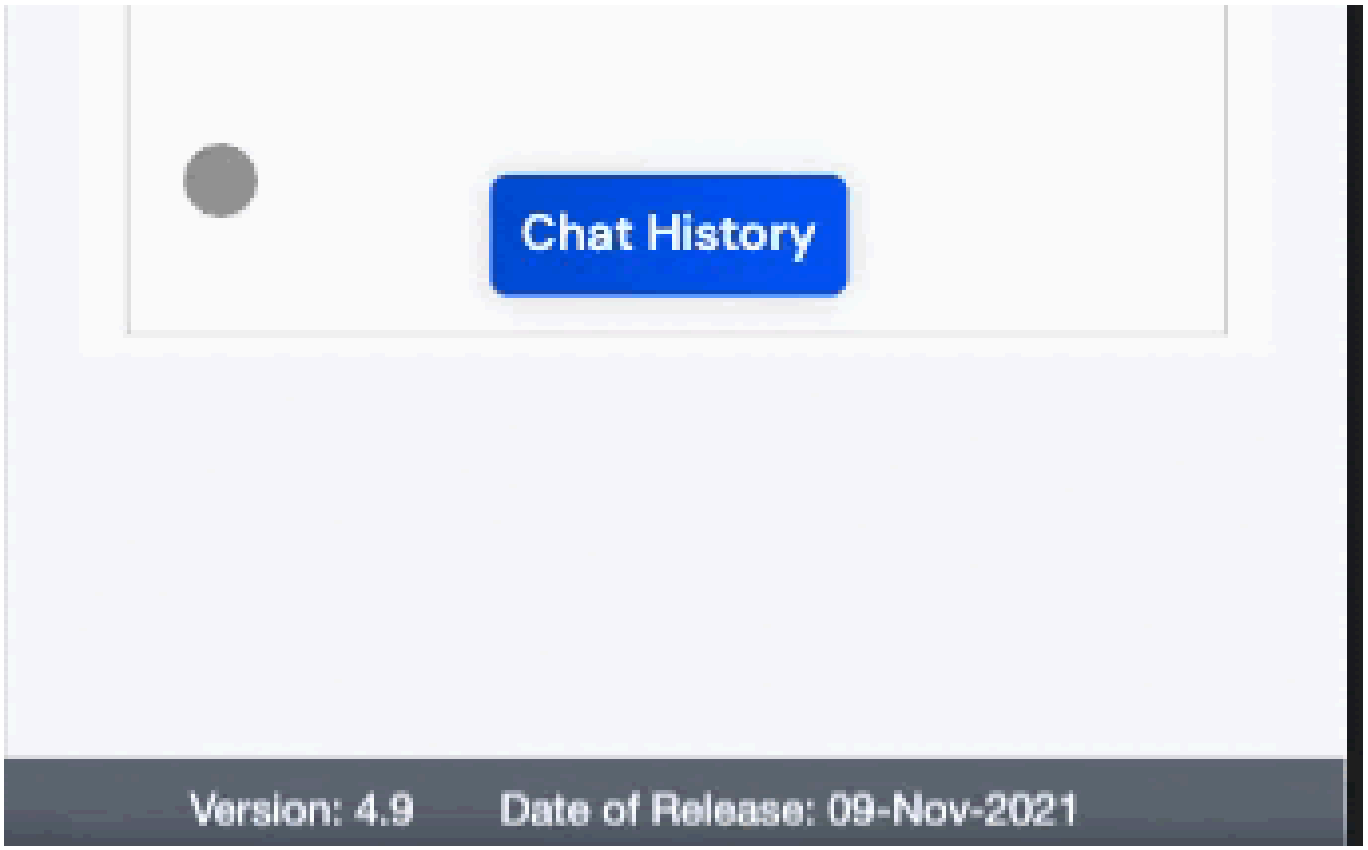
NA

Date

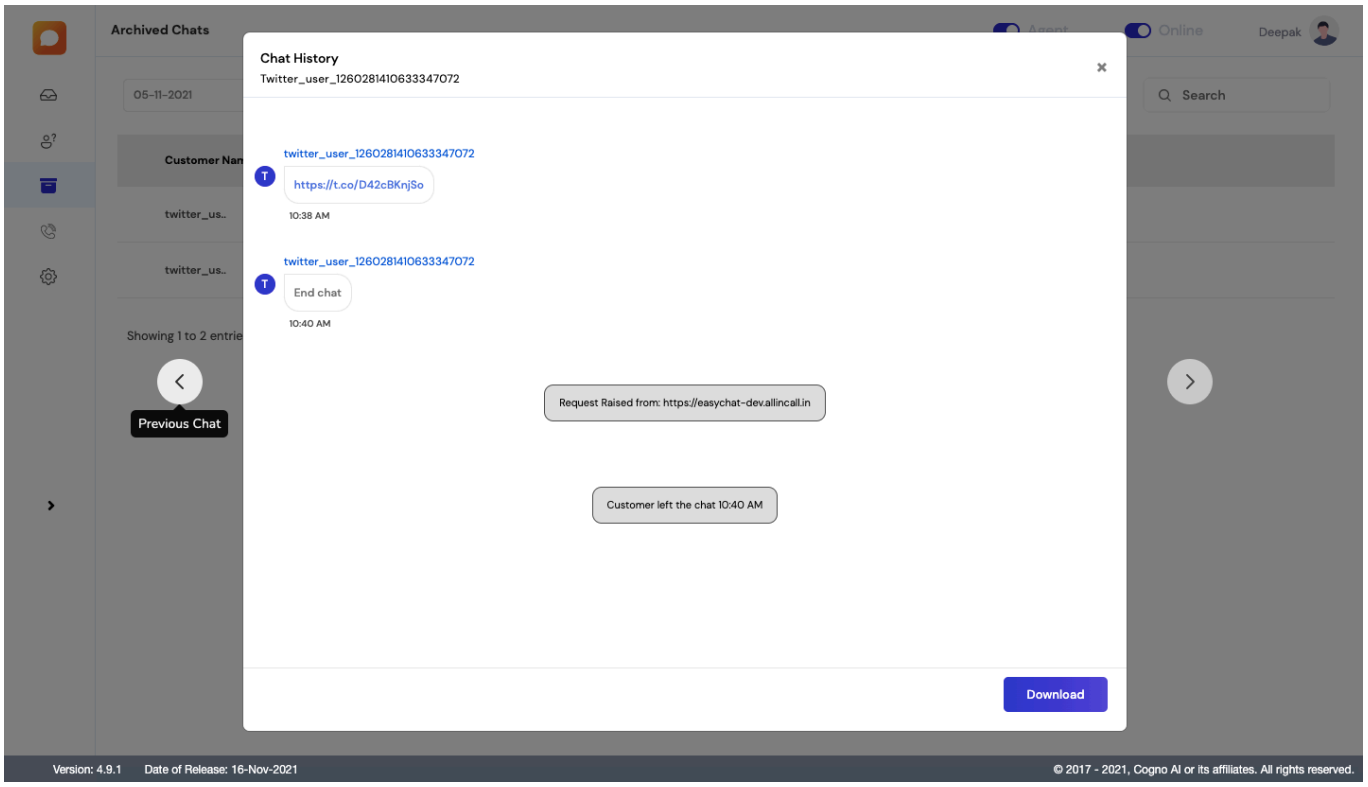
25-Oct-2021, 07:13 PM

Duration

52s

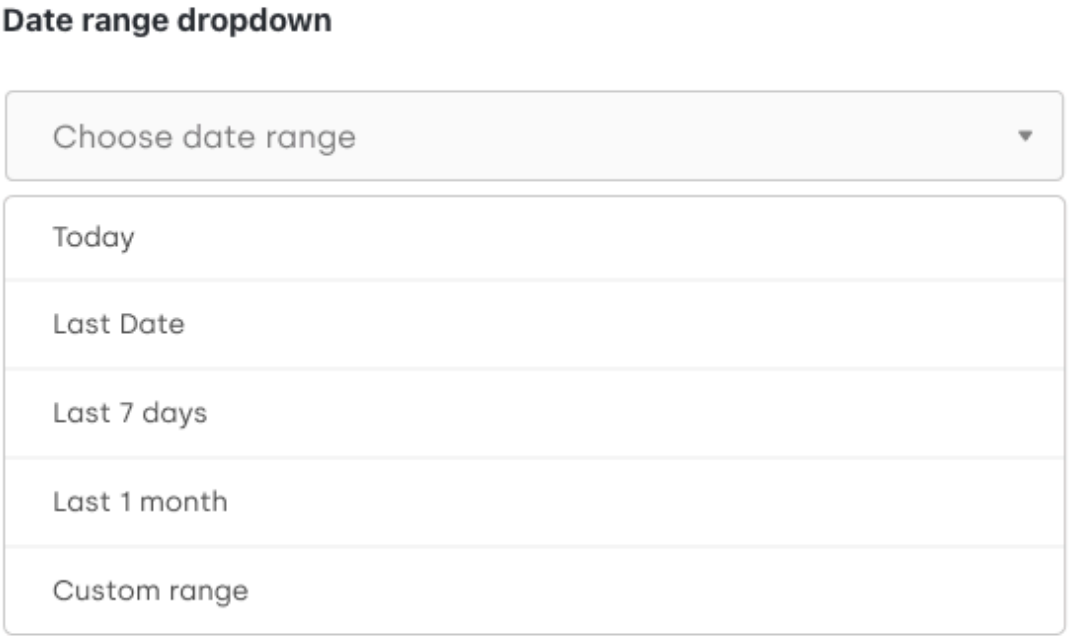


Web view Agent Side



Chat History Export

an option inside our LiveChat admin side 'Chat History' to download Chat Histories (For conversations) in bulk. This will export all conversation histories at once, available in "Today", "Last Day", "Last 7 Days", "Last 1 month" and "Custom Range" filters.



Please Note : Each sheet name inside an exported report (workbook) would represent a "Date". Eg. "01/01/2021".All the conversations from different customers on a particular date would be added in that corresponding sheet.

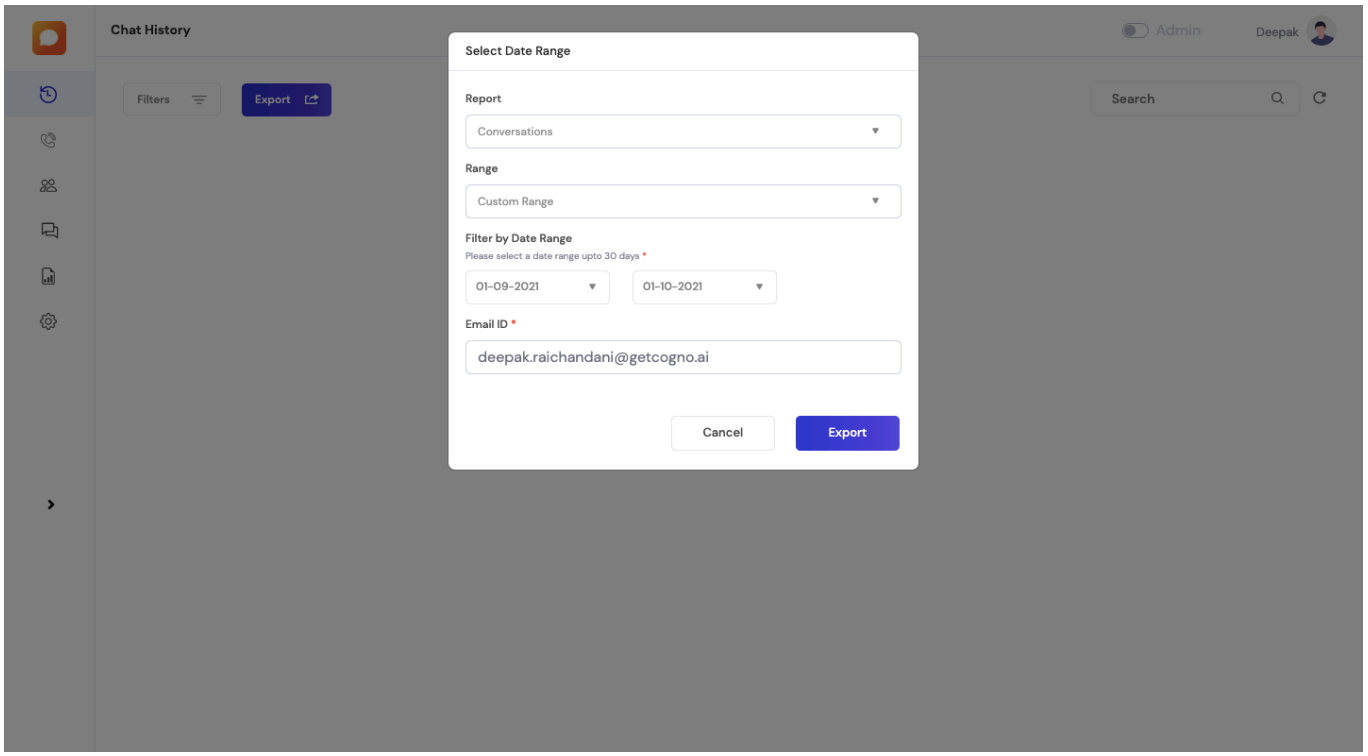
The downloaded workbook (report) naming convention : “LiveChat Conversations || "Bot Name" || "DD/MM/YYYY - DD/MM/YYYY".xls”

Single Unique Identifier - A unique identifier linked with a customer chat, which shall help us to determine if a chat initiated is a new chat or a re-initiated chat. We can consider the "**Client ID**" variable as a unique ID.

"Chat re-initiated on" : A new attribute added to a chat history by the name "Chat re-initiated on". This value will by default stay null. Once a chat has been re-initiated on the same

date, this attribute would reflect the timestamp when the chat got re-initiated again. If the chat gets re-initiated more than once on the same date, all the re-initiation time stamps would be visible on this field separated by commas.

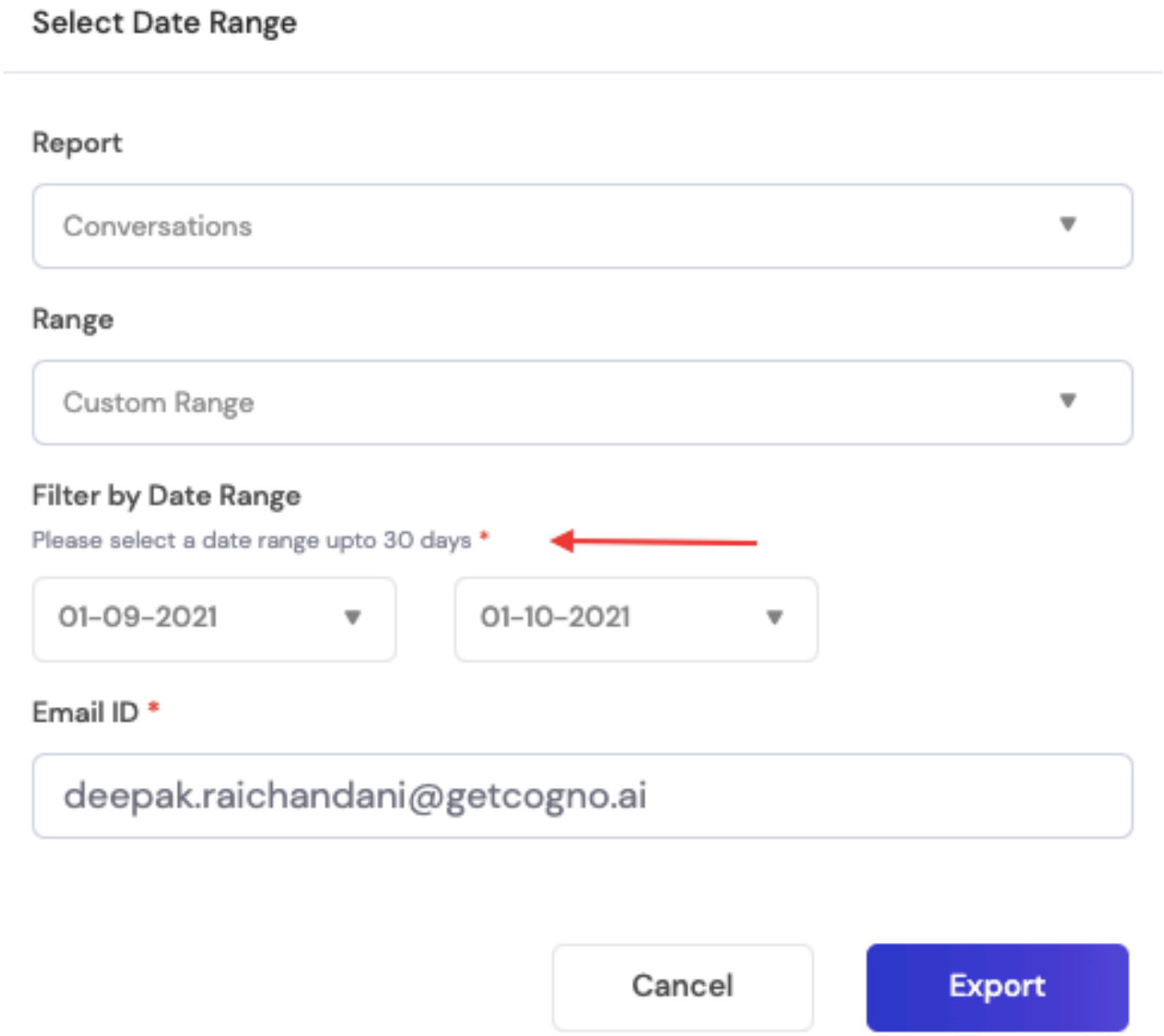
To configure : This is visible under LiveChat (Admin) > Chat History > Export > Report type : Conversations > Select date range



Feature Working

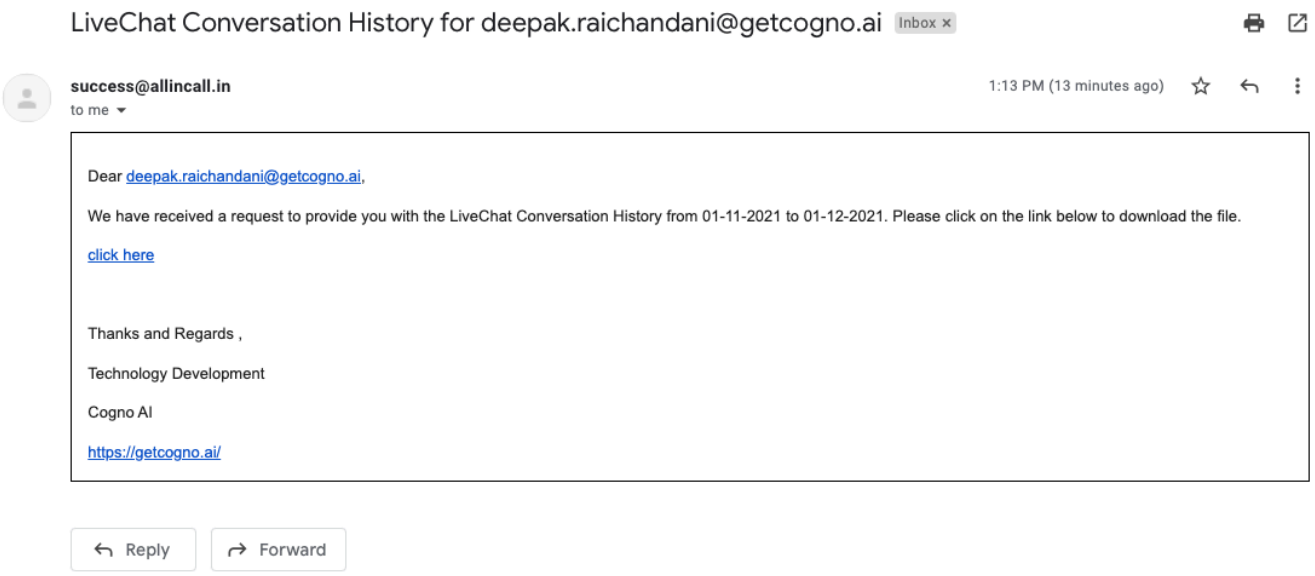
New option in the "Export" section to export reports for existing "chat history" along with the new addition of "Conversations" which will generate bulk conversation history over the periods specified in the relevant dropdown.

Please Note : The selectable custom date range cannot exceed 30 days/ 1 month. Message "Please select a range upto 30 days*" can be seen here.



Please Note : The calendar would automatically stay activated till 30 days, post that, all the dates would be disabled so customers can't select a value.

The report should be sent over the email id provided.



Identification of User Chat Termination by User or Agent.

The admin can see whether a chat has been terminated by an agent, the user or by the system.

This is visible under : LiveChat> Chat History> Chat Termination Column

Customer Name	Agent Username	Channel	Chat Category	NPS	Taggings	Start Date-Time	End Date-Time	Duration	Wait Time	Chat Termination
GGGGaaa	ta7447317@gmail.com	Web	others	NA	View	18-Jan-2022, 12:42 PM	18-Jan-2022, 12:52 PM	10m 11s	15s	System
manish	ta7447317@gmail.com	Web	others	NA	View	17-Jan-2022, 04:04 PM	17-Jan-2022, 04:17 PM	13m 38s	1s	Agent
abc	lukkilulma@vusra.com	Web	others	NA	View	17-Jan-2022, 03:57 PM	17-Jan-2022, 04:07 PM	9m 50s	14s	Customer
ABC	ta7447317@gmail.com	Web	others	NA	View	17-Jan-2022, 03:46 PM	17-Jan-2022, 04:00 PM	14m 22s	0s	Customer
Abc	lukkilulma@vusra.com	Web	others	NA	View	17-Jan-2022, 03:29 PM	17-Jan-2022, 03:45 PM	11m 18s	11s	Customer

This feature helps determine whether the chat had been terminated by the customer, agent or the system.

- **Customer-** When the interaction was terminated at the user end
- **Agent-** When the agent resolved the chat

- **System-** When Chat Disposal disposes off a chat

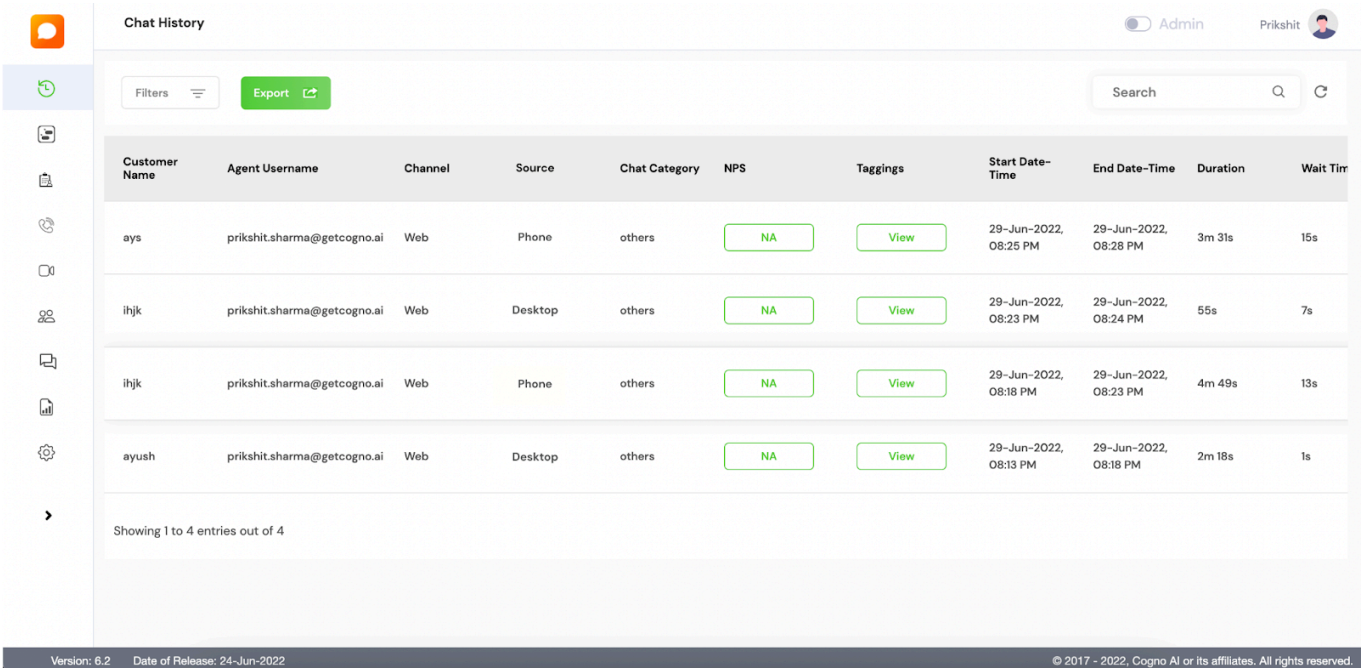
Please note : (Limitations)

1. In case a customer re-initiates a chat on the next day or any day other than which he initiated the chat on, in that case the new conversation won't be appended to the previous conversations. A new chat would open for that particular day in that case.
2. If a customer re-initiates a chat on the same day after initiating it once before, the new conversations will get appended to the previous conversation. The time stamps are separated by commas for the ones that the customer has re-initiated the chat on.
3. It would only append the chat if the customer details match with a single unique identifier (Client ID). This unique identifier as of now would be a mobile number, however it can change to the desired value to set a customer attribute as a unique identification number.
4. The maximum range selection allowed in custom range would be 1 month.
5. If the user while exporting this report selects a date range in which no conversations took place, we would revert them with a blank workbook just holding the Attribute names.
6. In case the user while exporting a conversation report, selects a date range which is before the bot go-live date, in that case the report generated would be a blank report.

Bifurcation of Source

Customer device bifurcation analytics for Mobile & Desktop.

This is visible under LiveChat Console Login > **Chat History**



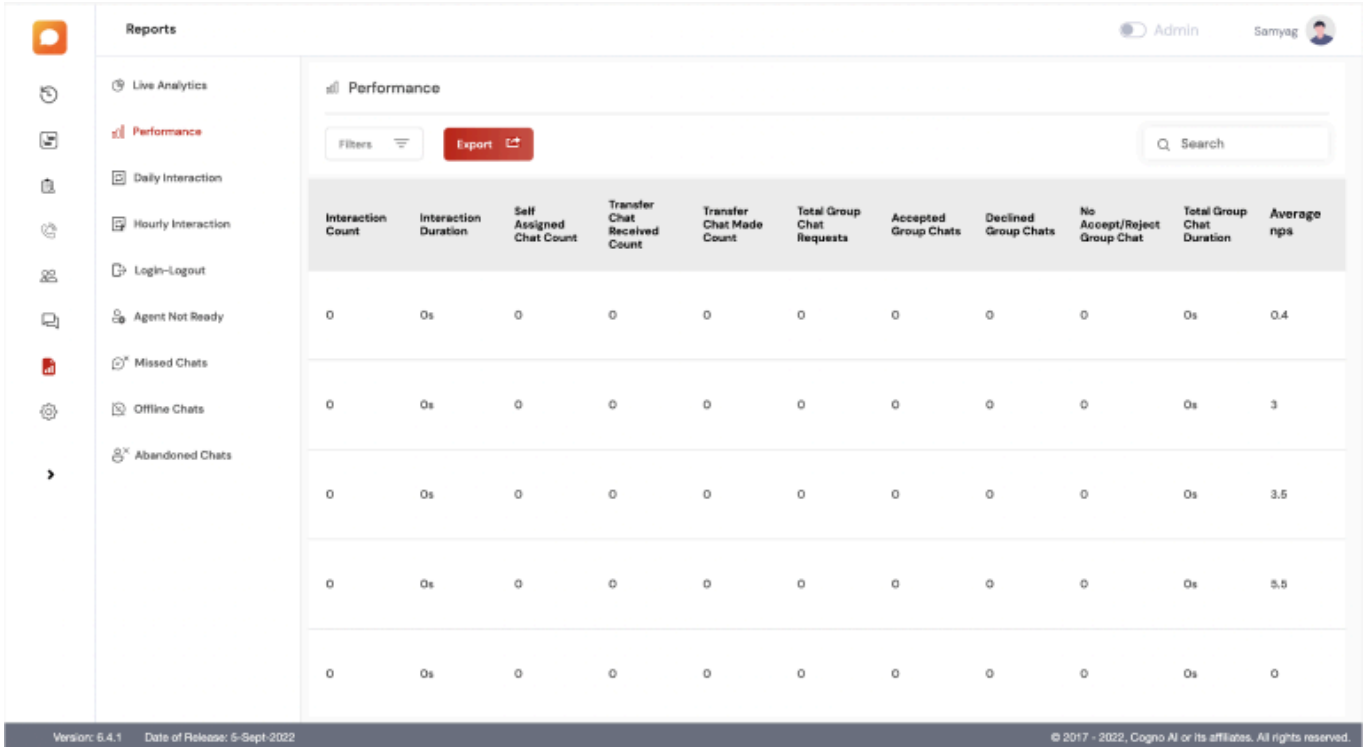
The Chat History table now consists of a column that will showcase the source of any chat request raised by the end customer.

NPS in Reports

NPS received will be available in the reports being exported.

This is applicable for the following:

1. Chat History Report
2. Performance Tab
3. Mailer Analytics



Sample of the above-mentioned reports is available here.

12.1.2.3. Group Chat

Groups and One to One Chats

Feature name	Definition
Groups in LiveChat	A functionality to create groups for multiple Agents and supervisors/admins. These groups can be used to have conversations among all the members.

Groups and One to One Chats

Feature name	Definition
One to One Chat	Agent can have one to one conversion with the supervisor

1. Message Delivery Status

The messages will be seen with the proper delivery status. This will be applicable in both one on one chats, as well as group chats.

Whenever the message is sent only one tick will be displayed. After the message has been delivered to all the members of the group the single tick will turn into two ticks and as soon as it has been read by everyone in the group the ticks will turn blue.

2. Leave Group

An option has been given to the users if they want to leave a particular group. Once they leave they cannot send or receive messages in that group

3. Delete Group

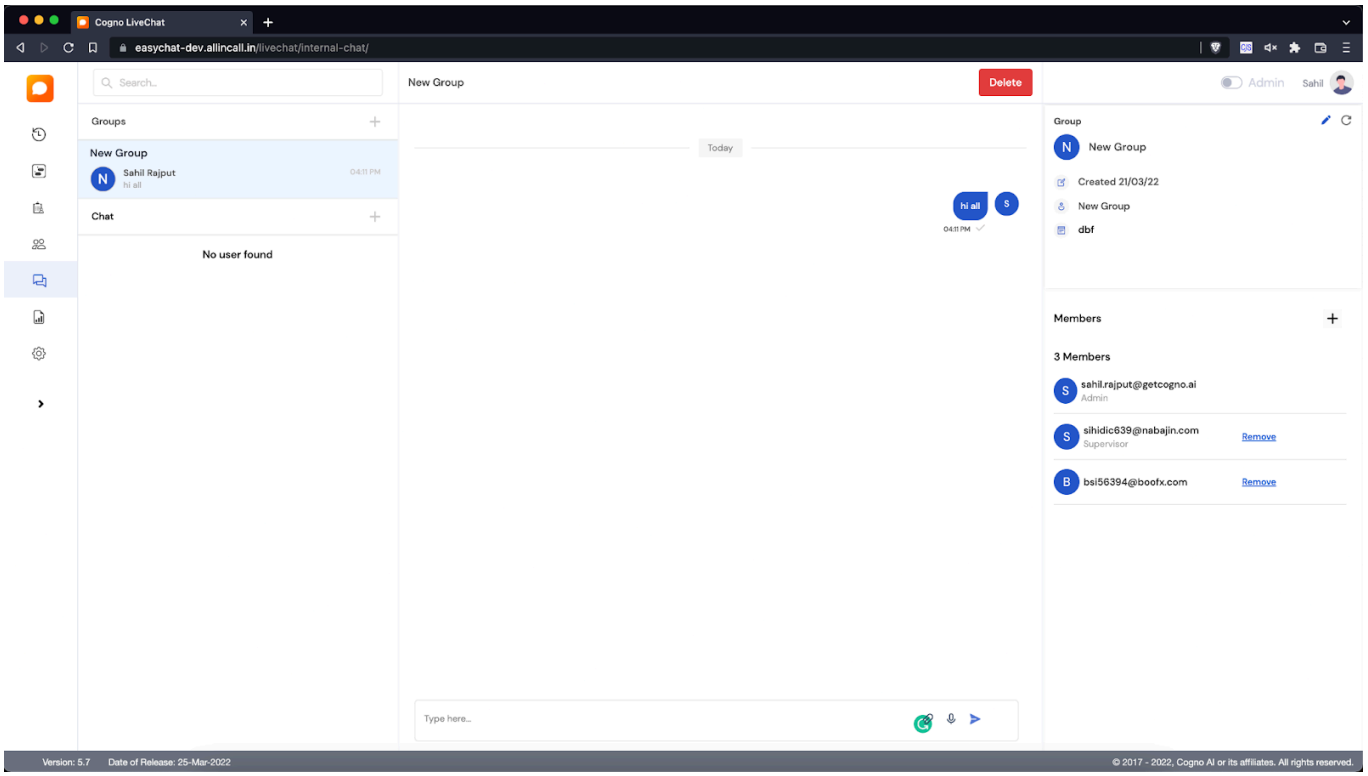
If a member has been removed from the group or has left the group an option has been provided for them to delete the group and all the messages present. This button will appear in place of the leave button.Also for admin/supervisors who created a group, this option will be showcased instead of leave, to delete a group completely for all the users.

4. Notification system

Notifications are going to be shown on the desktop even when minimized. The most recent notification will be shown on top of the sidebar.

5. Group Name on Top

The group name appears on the navigation bar



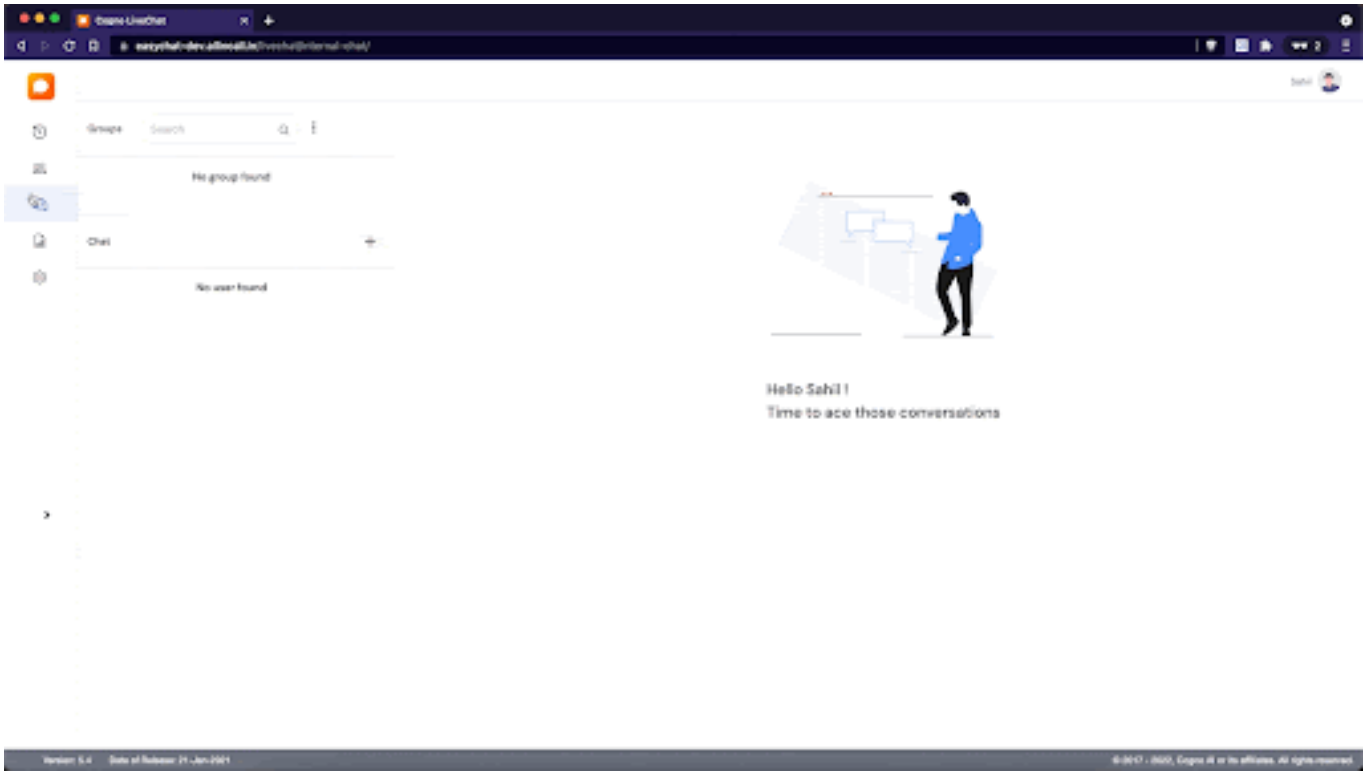
12.1.2.3.1. Supervisor/Agent Groups

Supervisors have access to create groups with the agents that are **assigned to them.**

The supervisor must create a new group and he will be able to change the group name, the group icon and the description of the group.

The supervisor can also add the admin to the group if necessary.

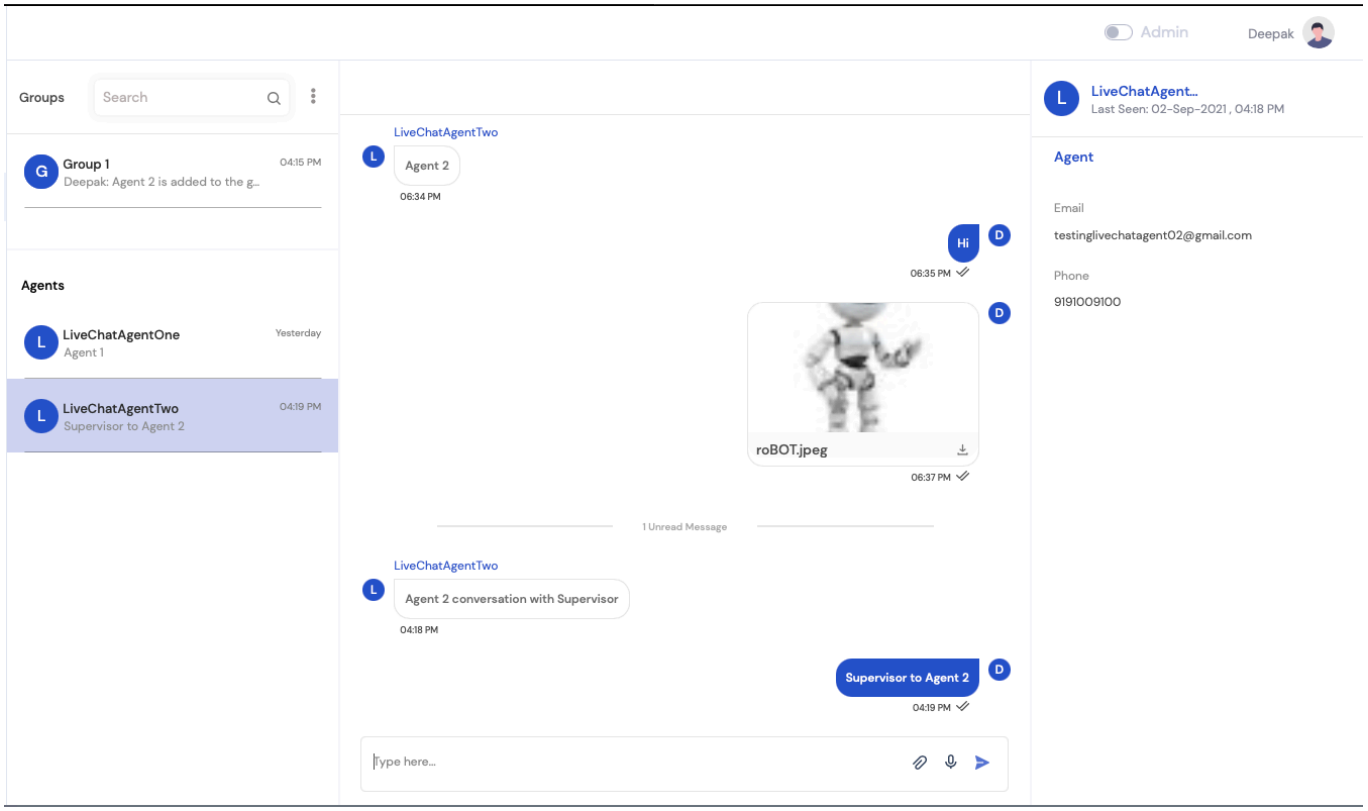
Refer to the below-shown demo for better understanding or click here



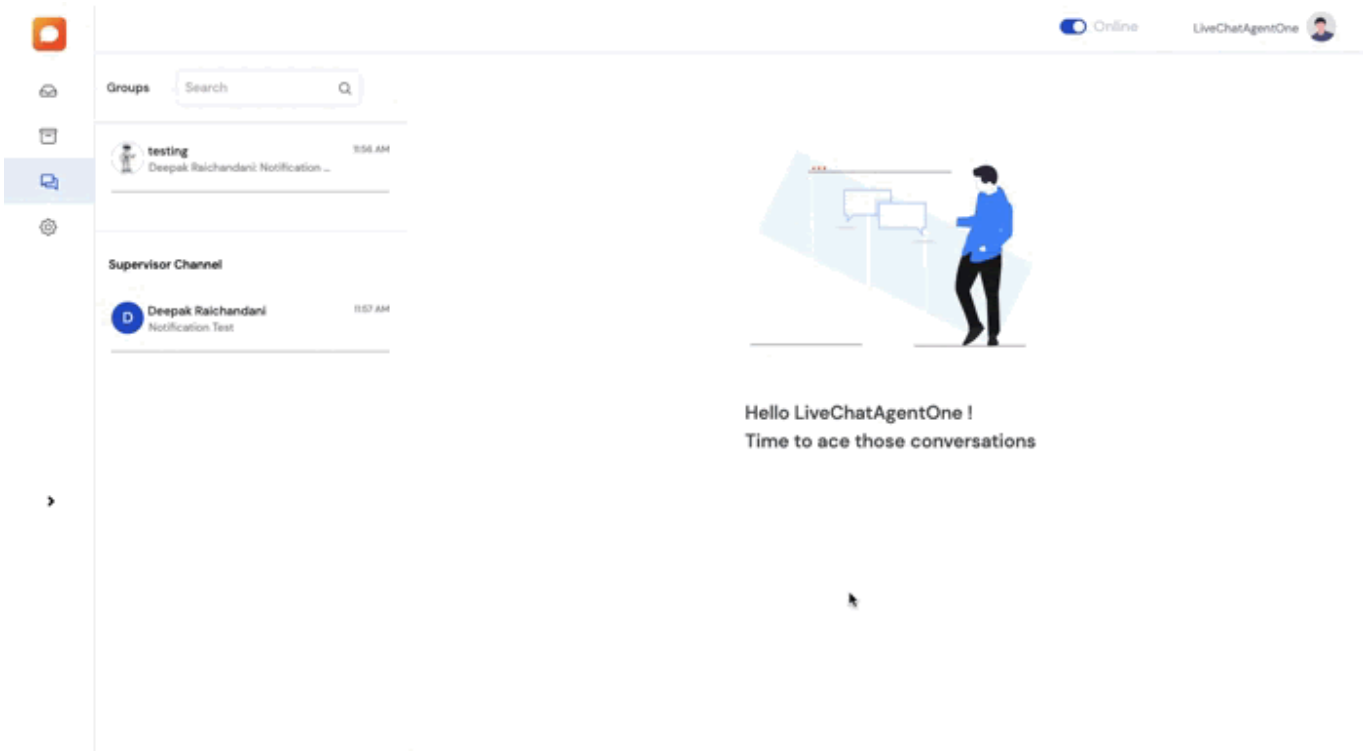
12.1.2.3.2. Admin/Supervisor-Agent Channel

One on One Chat with the Supervisor

Also Agents can have **one on one conversations** with their Supervisors or Admin which are showcased on the Groups section of their dashboards.



Refer the below demo for better understanding on one on one chats

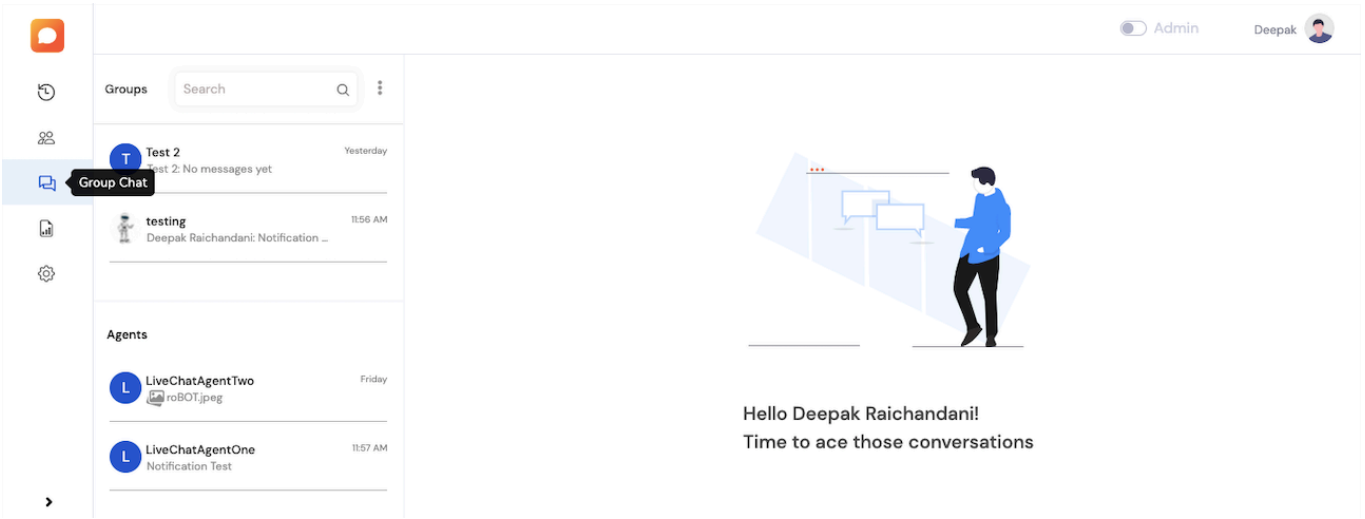


One on One chat with the Supervisor

12.1.2.3.3. Admin/ Supervisor Group Channel

A functionality to create groups for multiple Agents and Supervisors. These groups can be used to have conversations between all the members.

This is visible under Live Chat Console > Group Chats > Groups and Individuals



As an admin, a console user would be able to create a group as well as control the Adding/Removing members of the group. They will also have the list of all the Agents that are there in the system. An admin can view, update, remove the group. An admin can initiate, manage and chat with agents.To create a new Group user can click on the 'New Group' button and fill in the required details like Group Name, Group Description, Group members can be selected (from the available members in the list) and Upload Group Icon (Optional). Compulsory fields have been marked as * . Please refer to the below given demo for better understanding. Note : Create group functionality is only available to the Admin. Also they can edit the group details like name and description.

Admin

Deepak

Groups

Search

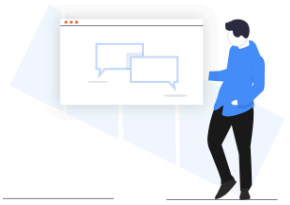
+ New Group

No group found

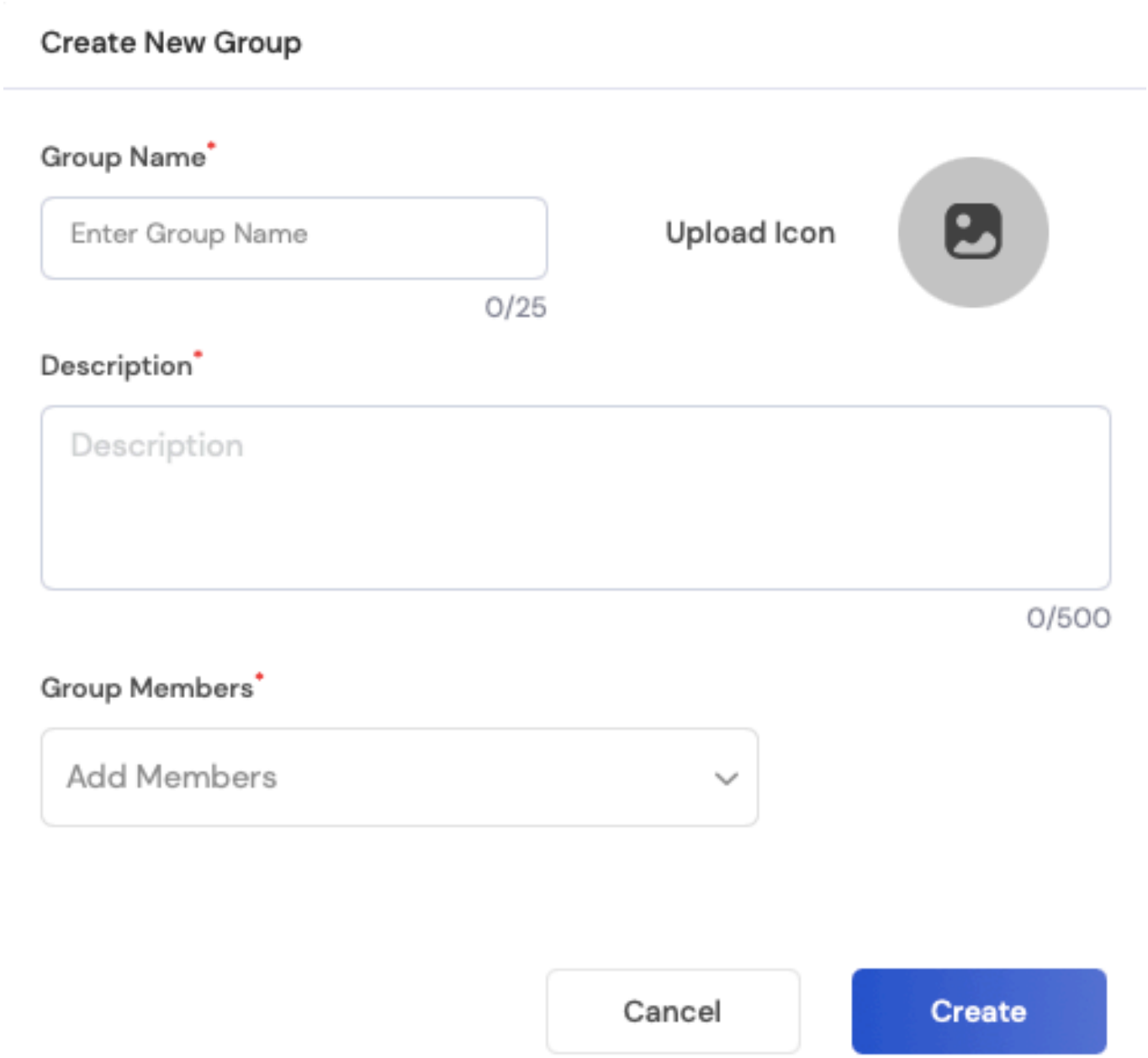
Agents

L LiveChatAgentOne Yesterday
Agent 1

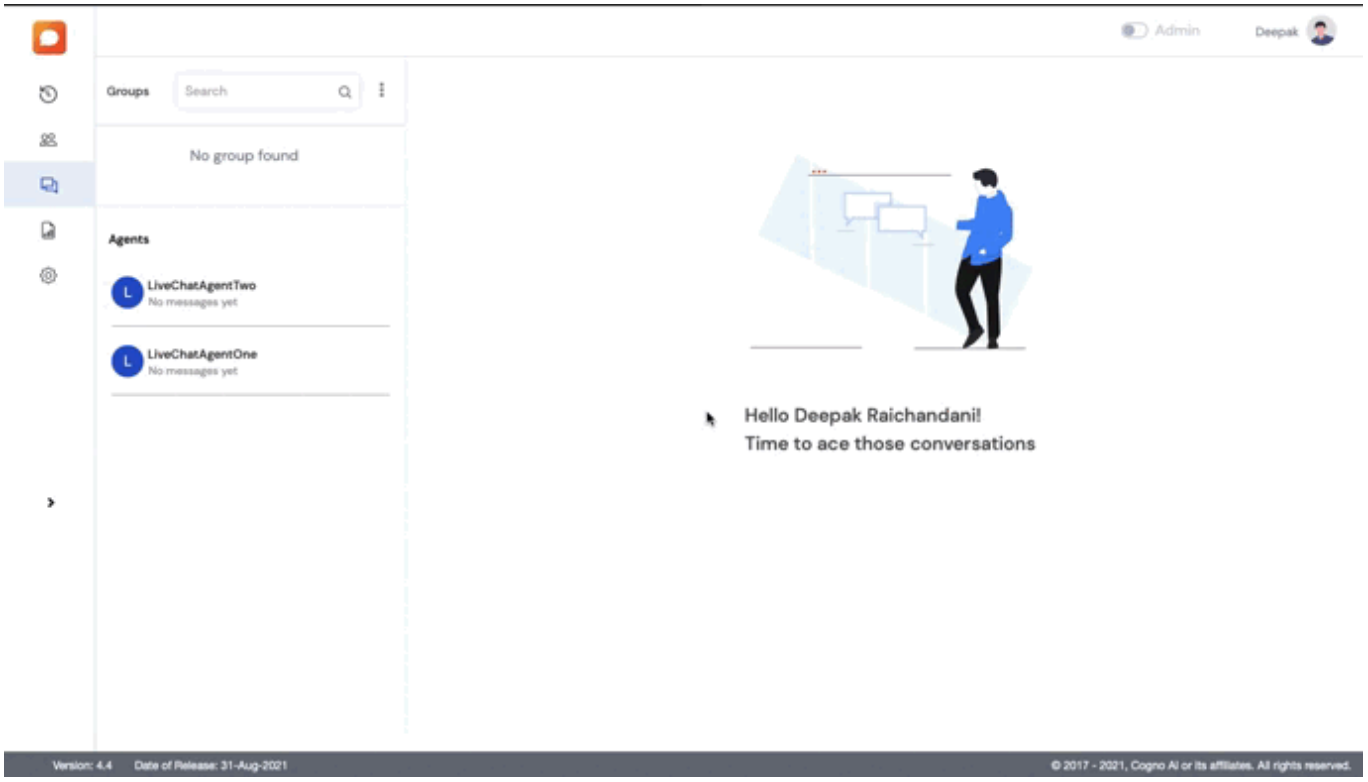
L LiveChatAgentTwo Friday
roBOT.jpeg



Hello Deepak Raichandani!
Time to ace those conversations

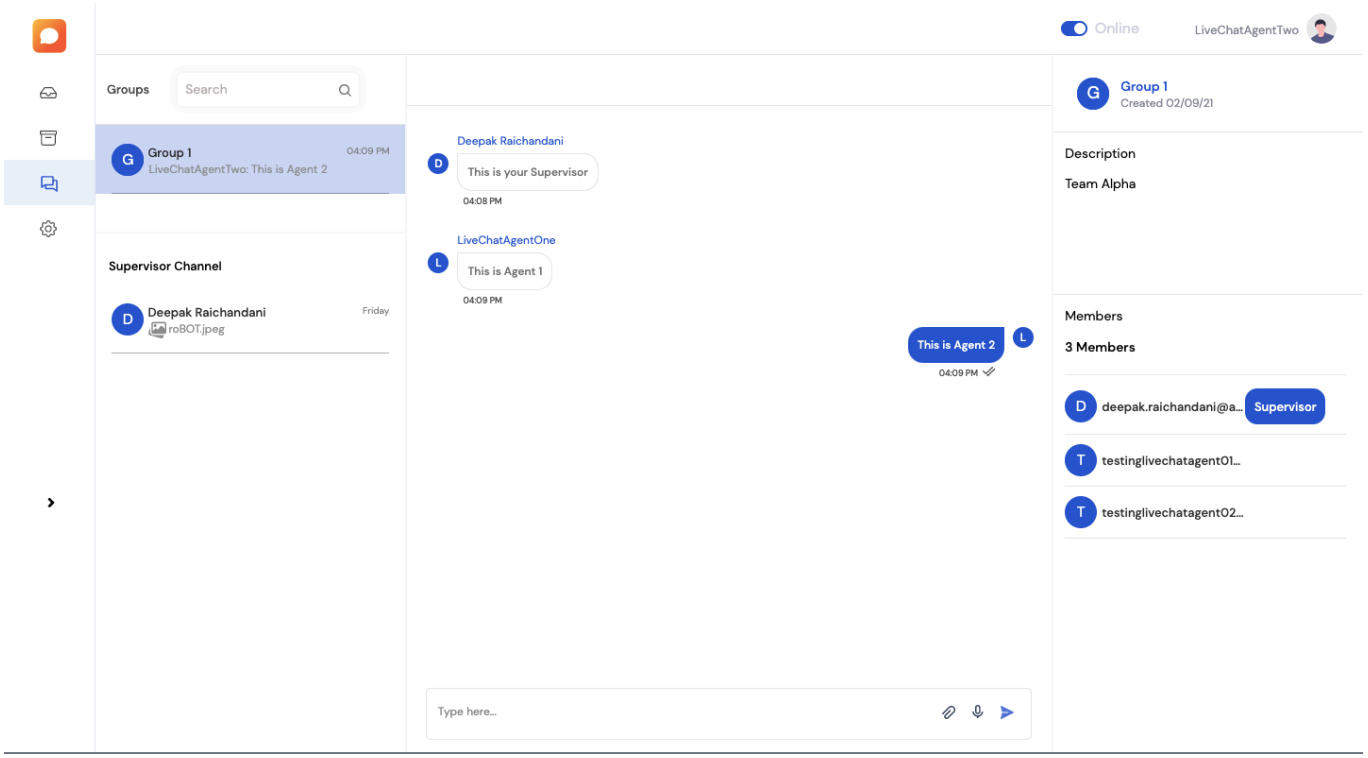


Please refer to the below given demo for better understanding.



Groups for live chat agent - Creating a group (Supervisor Side)

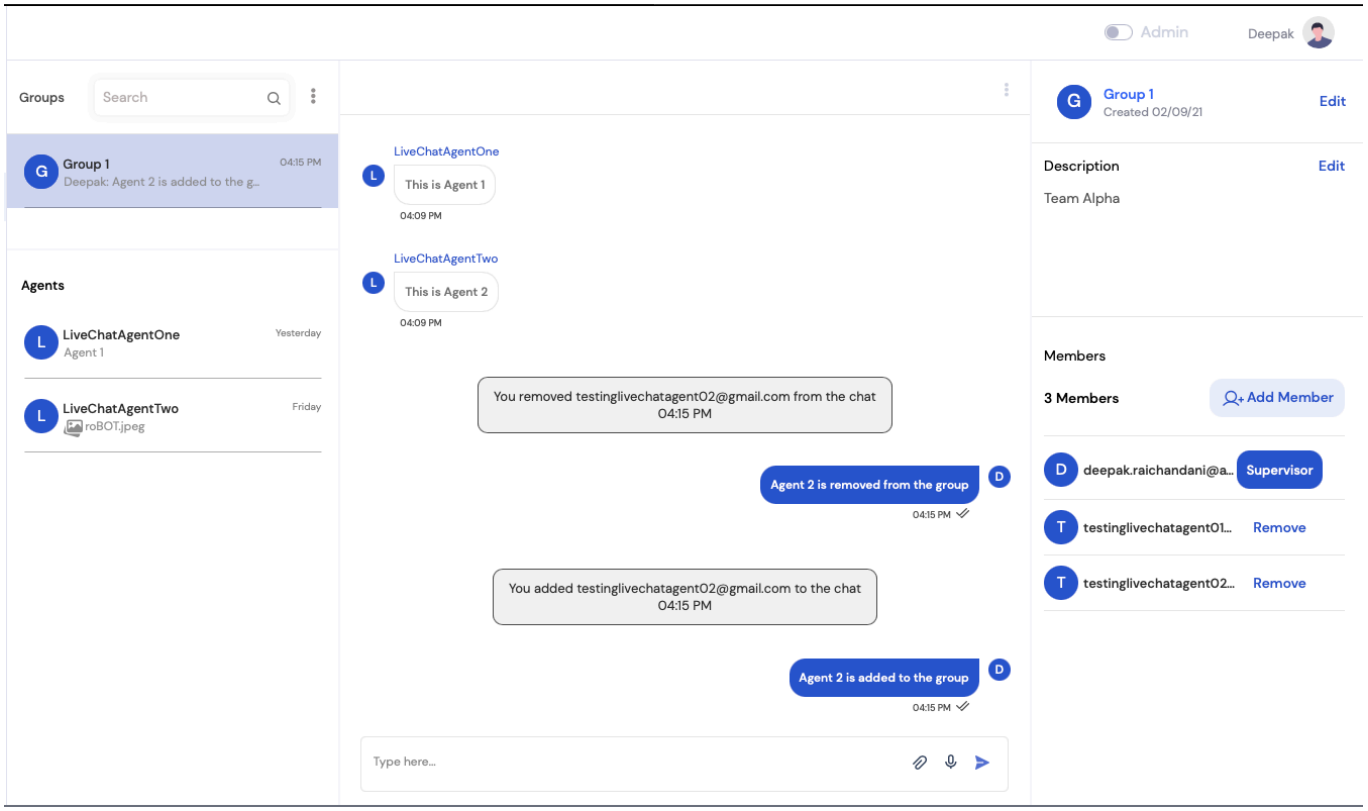
An Agent will only have access to view and converse in the group(s) they are part of.



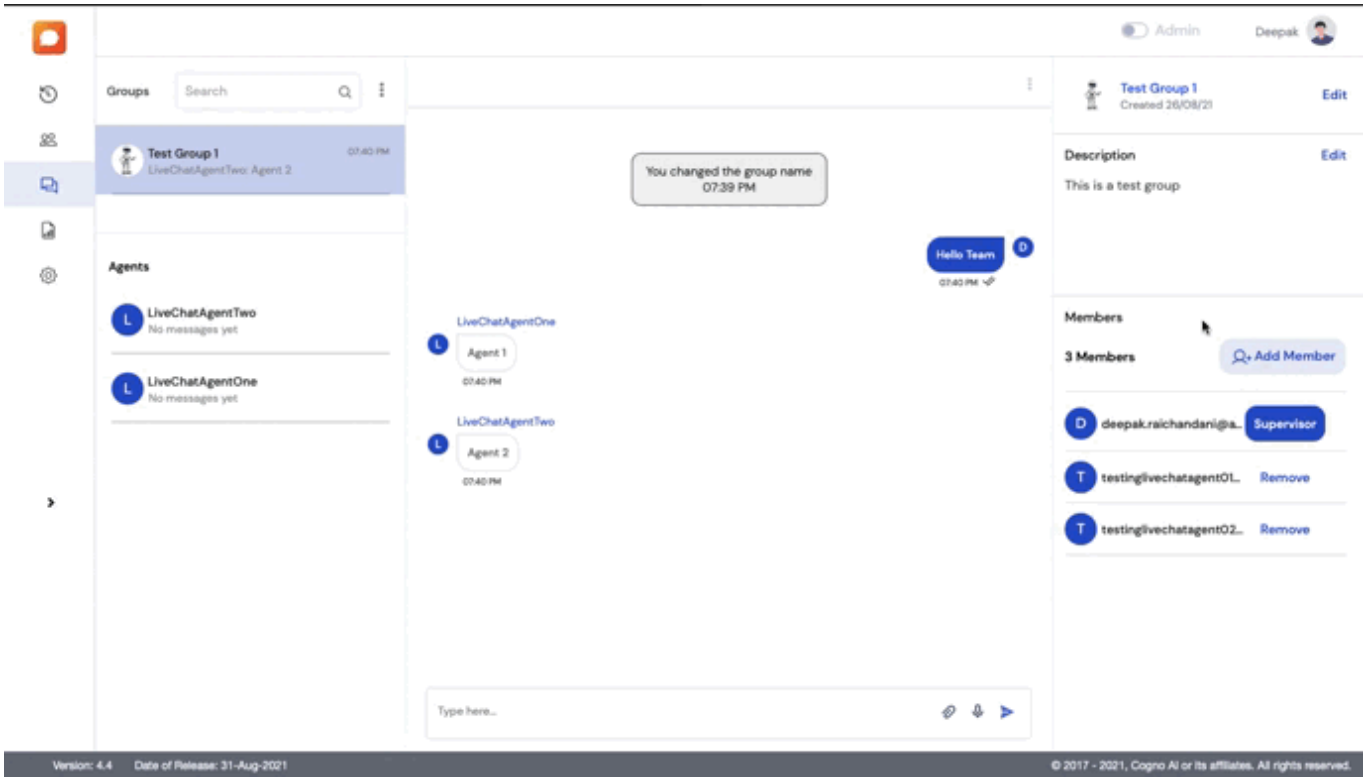
Groups for live chat agent - Agent Side

Agents can be added/removed from the group only by the admin. In such a case all the other members will be able to see a notification of agent added/removed from the group. Group

details like name, descriptions can also be edited by the admin.

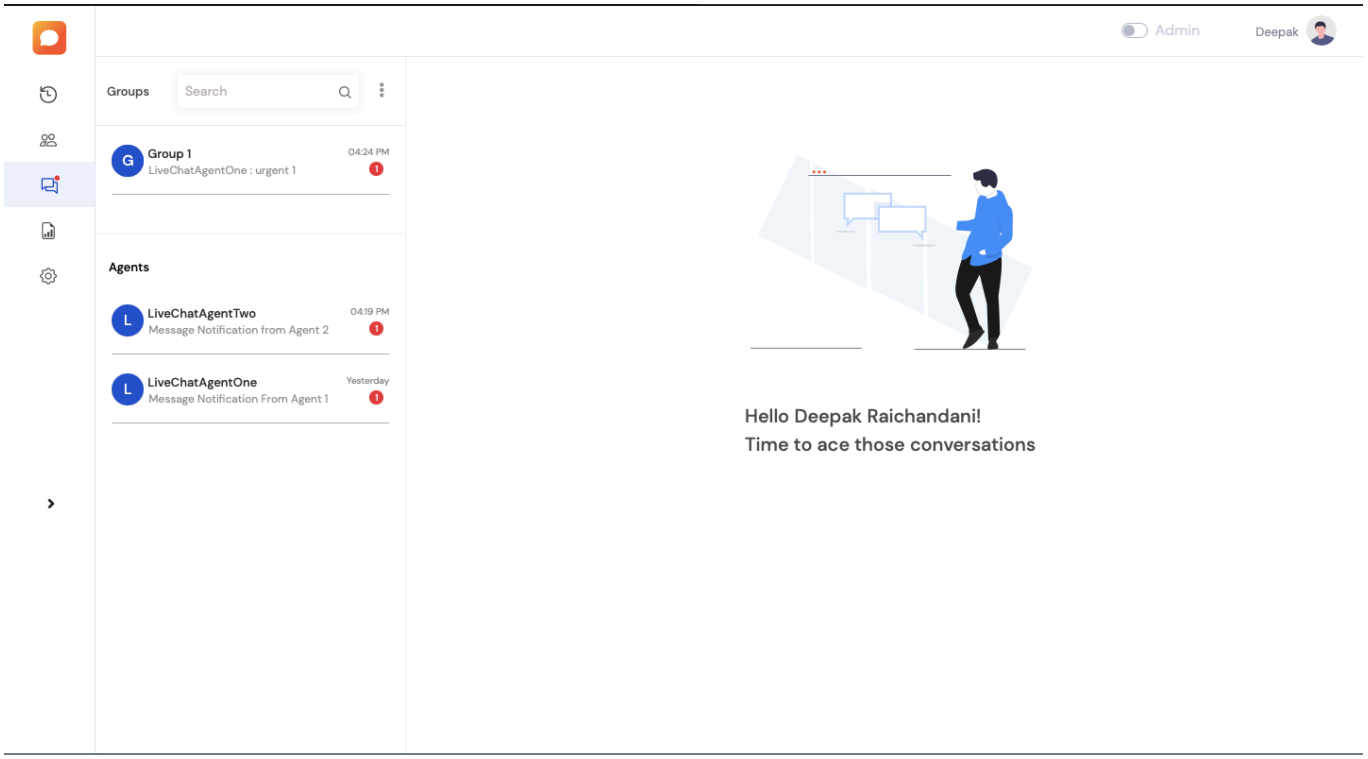


Please refer to the demo shown below for adding/removing agents and deleting a group.



Groups for live chat agent - Adding/Removing Members from the group and Deleting the group

When an Agent/Supervisor will receive a message in the group/one on one chat, while they are having a conversation with end clients, then a notification will be showcased. Please refer to the demo below for better understanding.

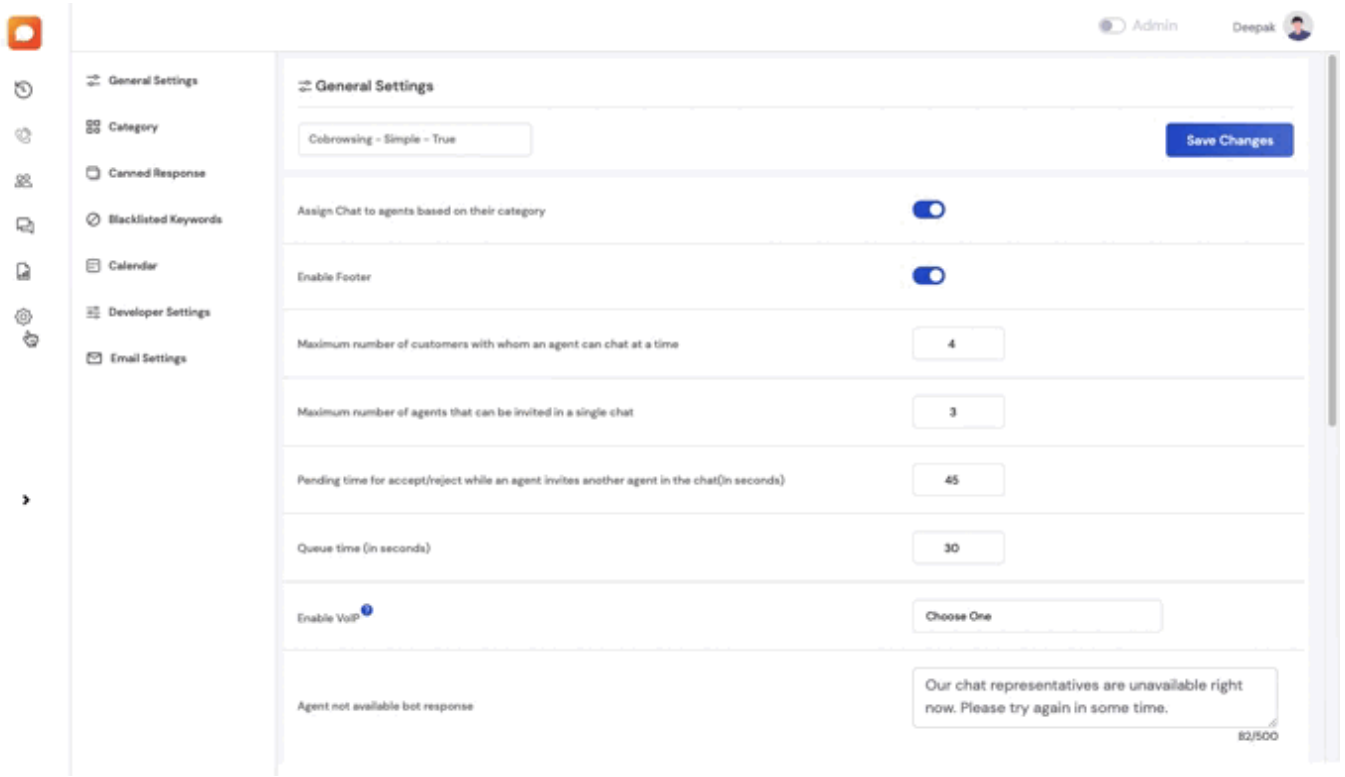


Notification on new message

12.1.2.4. VOIP

- VOIP in LiveChat- An option to initiate the VOIP call in PIP and a new tab at the agent's and the customer's end.
- Agents will be able to Self Assign Chat.

This is visible unders LiveChat (Admin Side) > Settings > General Settings > Enable VOIP > PIP or NEW TAB



1. If the user selects VOIP in PIP the agent and customer can do a conversation over VOIP in PIP i.e in the same tab.
2. If the user selects VOIP in the New tab the agent and customer can do a conversation over VOIP in the new tab. **i.e** after initiating the VOIP call the agent and customer will be redirected to a new tab

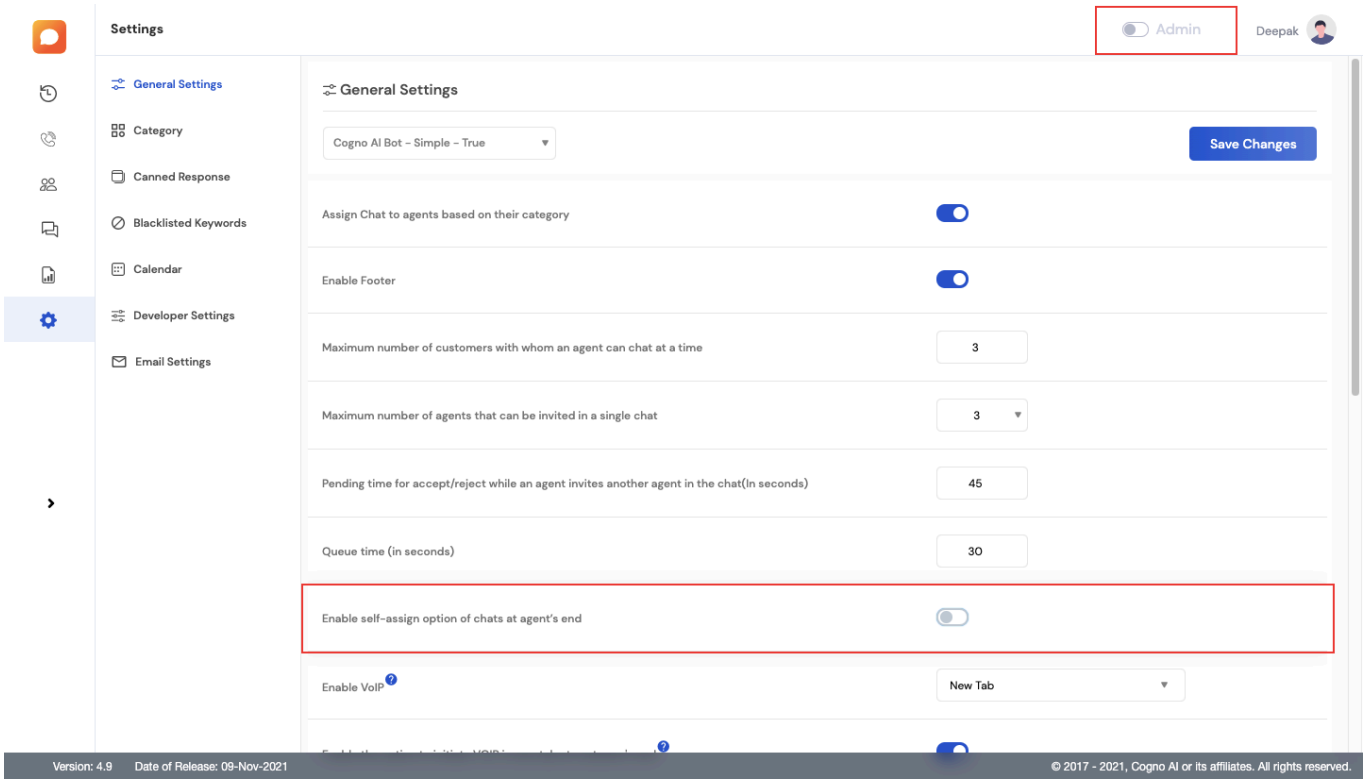
Note : The download column option in VOIP History will only be available when the Option "New tab" is selected in Enable VOIP in admin settings.If the agent capacity is full for the

LiveChat, now the agents can view & self-assign waiting chats. These waiting chats are sometimes getting dropped.

To enable Self Assignment for Agents :

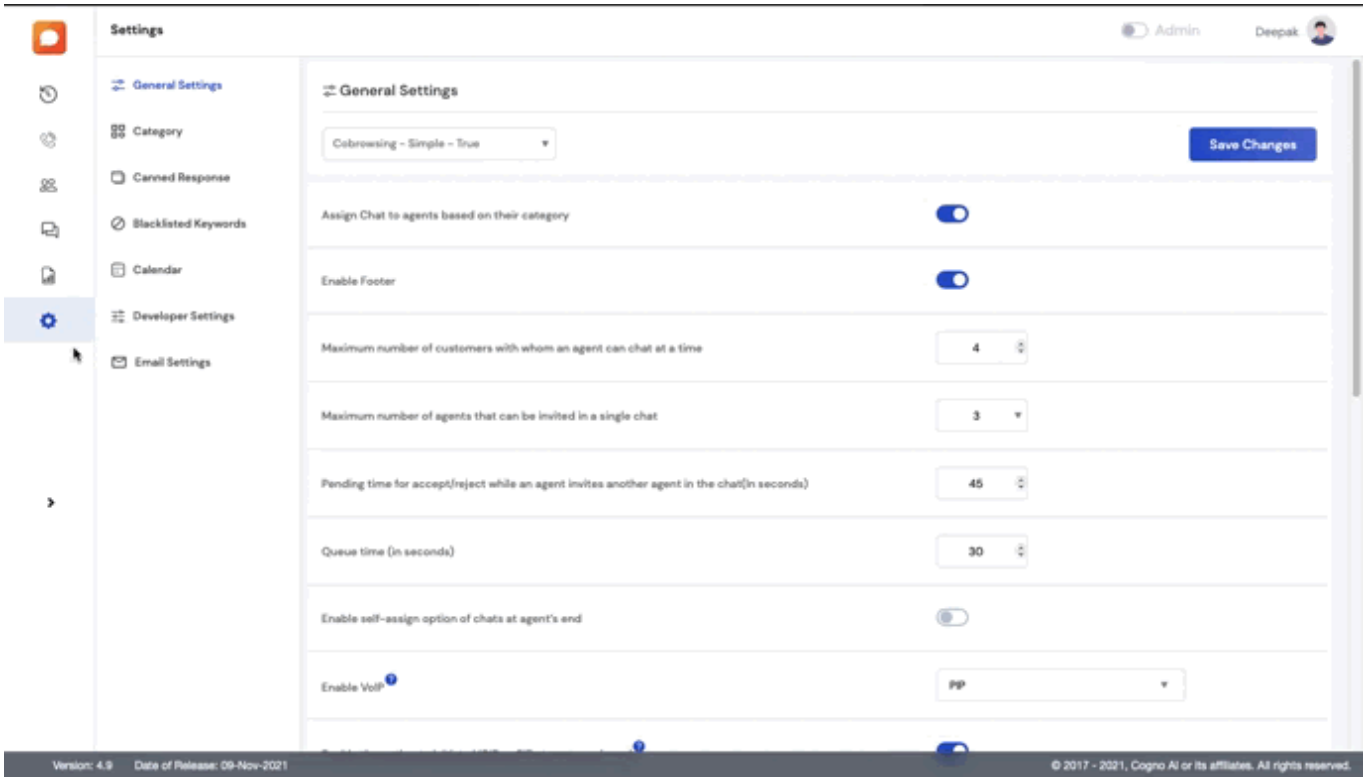
To enable this option : This is visible under Cogno Chatbot Cogno LiveChat Console (Admin Side) > Settings > General Settings > Enable self assign

Admin Side : To "Enable self-assign option of chats at agent's end" is provided. By default, the option will be off. On Enabling the toggle self-assign option of chats at the agent's end will be available.



Refer the below given demo for better understanding

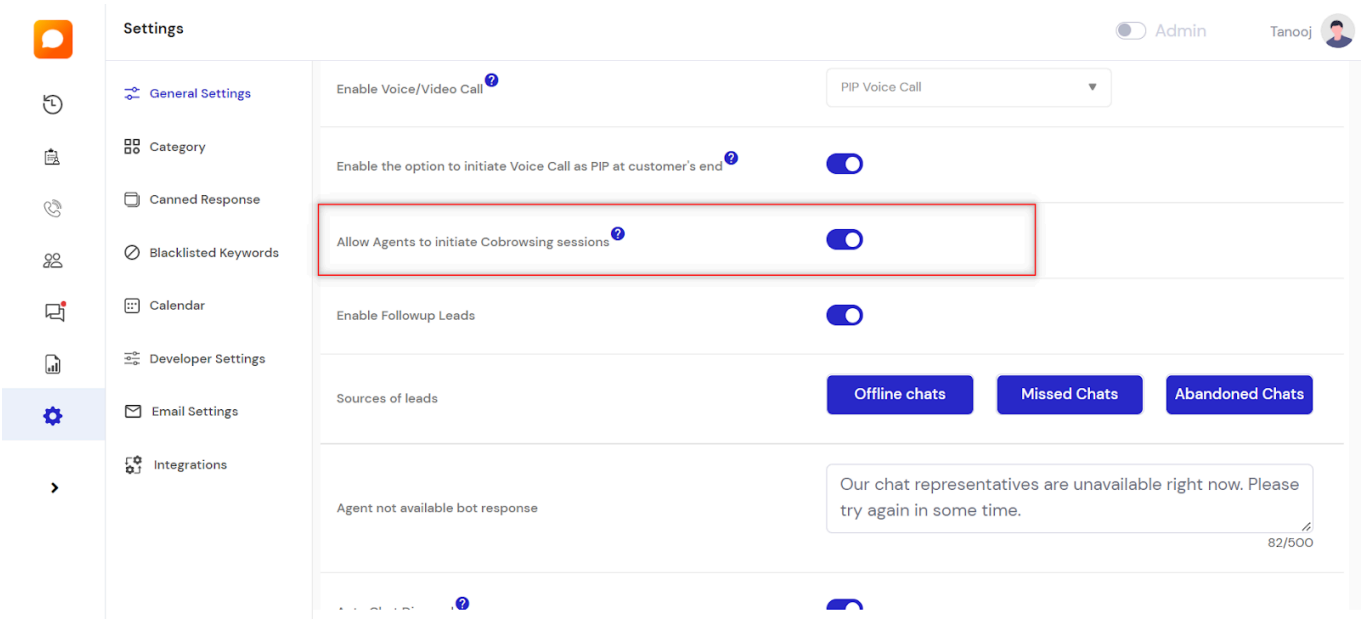
To enable :


Settings
Admin
Deepak
General Settings
Category
Canned Response
Blacklisted Keywords
Calendar
Developer Settings
Email Settings
General Settings
Cobrowsing - Simple - True
Save Changes
Assign Chat to agents based on their category
Enable Footer
Maximum number of customers with whom an agent can chat at a time
4
Maximum number of agents that can be invited in a single chat
3
Pending time for accept/reject while an agent invites another agent in the chat(in seconds)
45
Queue time (in seconds)
30
Enable self-assign option of chats at agent's end
Enable VoIP
pip
Version: 4.9
Date of Release: 09-Nov-2021
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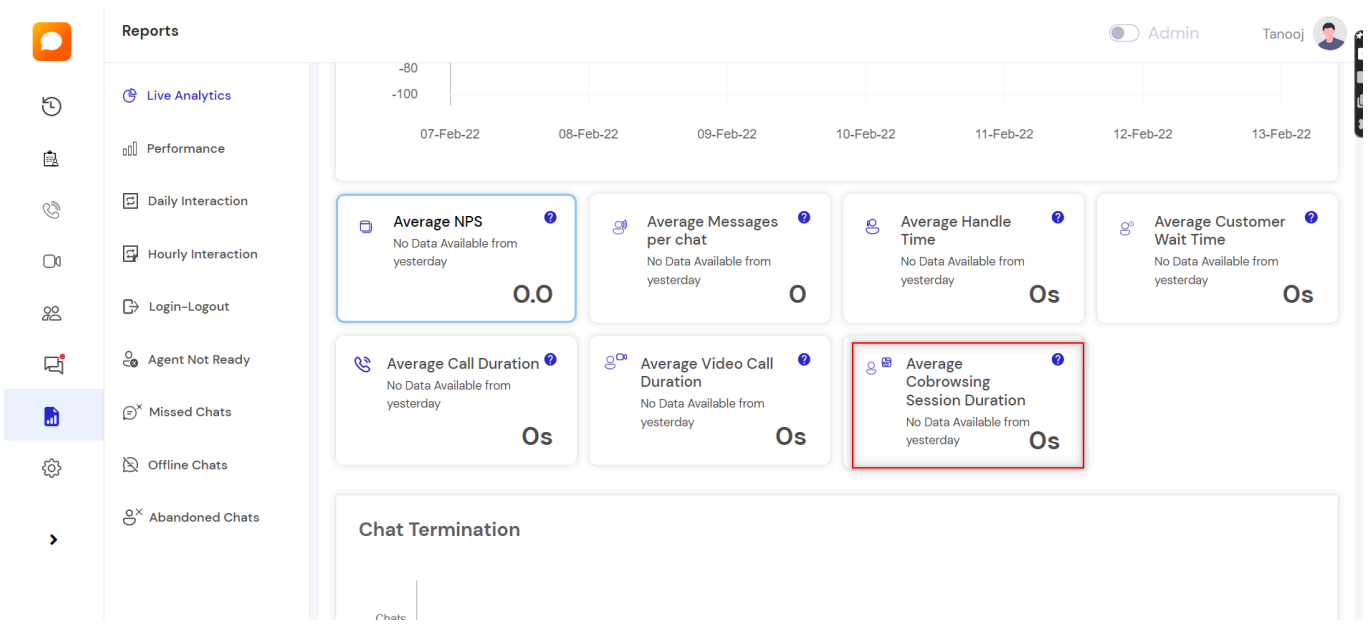
12.1.2.5. CoBrowse in LiveChat

A functionality is present that allows the agent to have co-browsing sessions with the user directly through the LiveChat.

To configure : This is visible under : LiveChat> Setting> General Settings> Allow agents to initiate Co-browsing sessions toggle



The admin allows the agents to initiate co-browsing sessions in a LiveChat conversation. Admins can see the details about all the co-browsing sessions that are currently happening or have happened. Admins would also be able to view the Average Video Call Duration in the Customer Reports of Combined Analytics.


Reports
Admin
Tanooj
Live Analytics
Performance
Daily Interaction
Hourly Interaction
Login-Logout
Agent Not Ready
Missed Chats
Offline Chats
Abandoned Chats
-80
-100
07-Feb-22
08-Feb-22
09-Feb-22
10-Feb-22
11-Feb-22
12-Feb-22
13-Feb-22
Average NPS
No Data Available from yesterday
0.0
Average Messages per chat
No Data Available from yesterday
0
Average Handle Time
No Data Available from yesterday
0s
Average Customer Wait Time
No Data Available from yesterday
0s
Average Call Duration
No Data Available from yesterday
0s
Average Video Call Duration
No Data Available from yesterday
0s
Average Cobrowsing Session Duration
No Data Available from yesterday
0s
Chat Termination
Chats

12.1.2.6. Admin Reports

Reports

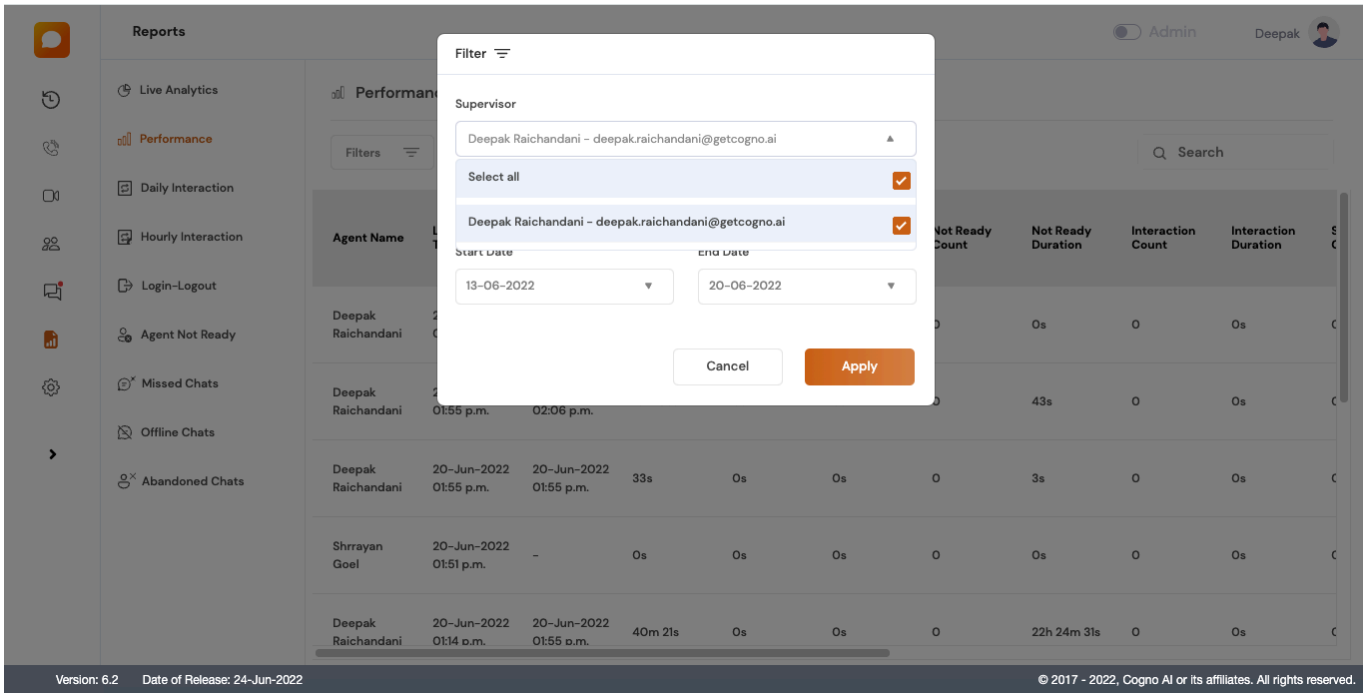
Feature name	Definition
Live Analytics	• Total Chats Raised- Addition of Total Resolved chats, Denied Chats, Ongoing Chats, Abandon chats, Customer declined chats • Total Resolved chats- Chats which are successfully handled and disposed by agent • Denied Chats- Chats which get deny due to unavailability of agents in work timings • Average Handle Time- Total Chat duration/Total customers • Currently Logged In Agents- Agents who have logged in to the Livechat console • Total Ready Agents- Agents who are ready for conversations • Not Ready Agents- Agents who are not ready because of certain reasons eg:Lunch, Coffee, Ad Hoc, Meeting. • Ongoing Chats- Total chats which are currently ongoing with agent • Stop Interaction Agents- Agent marks as stop interaction while going offline • Current capacity- Number of active agents multiplied by the maximum customer count agent can handle at a time. • Request in Queue- Customer which are in queue and ready to connect t agent • Abandon chats- Chats triggered during non working hours • Average Nps- Nps given by customer when the chat is ended by agent after successful conversation • Average Customer Waiting Time- Time spent by all customers in queue/ Total no. of customers • Average interactions per chat- Total interactions/ Total no. of customers • Customer declined chats- Customer leaves the chat when he/she is waiting in queue to connect to an agent.
Report	Admin can view all the information such as Performance Report, Daily Interaction Report,Hourly Interaction Report, Login-Logout Report,Offline message Report,

Feature name	Definition
	Agent Not Ready Report

Group/ Supervisor performance

To showcase analytics specific to the profile.

For the Admin This is visible under LiveChat (Admin Console) > Reports > All sections > Filter



By selecting the name of any one of the supervisors, the admin would be able to see the data related to agents assigned to that supervisor in the reports and analytics sections.This is added to the following sections in reports:

- Live Analytics
- Performance

- Login-Logout
- Agent Not Ready

12.1.2.6.1. Live Analytics

This is visible under Live Chat > Reports > Live Analytics

- **Combined Analytics**

This will consist of Chat Reports and Customer Reports which are represented on graphs

- **Live Analytics**

This will consist of Ongoing Chats, System Reports, Realtime Chat Reports

Widget will showcase the real time values in all cases. And at the end of the day (9pm everyday) it will record the peak of a graph and showcase the collative value of the day.

Following are the categories and subcategories shown in the live chat analytic.

Combined Chats Total chats raised, Total chats resolved, Missed Chats, Offline chats, Abandoned chats, Total Tickets Raised, Voice Call Initiated, Chats reinitiated within 24 hours, Chats reinitiated after 24 hours, Cobrowse Session Initiated, Follow Up Leads

Live Analytics > Agent Report Agents Logged-in, Stop interactions per chat, Active agents, Inactive agents

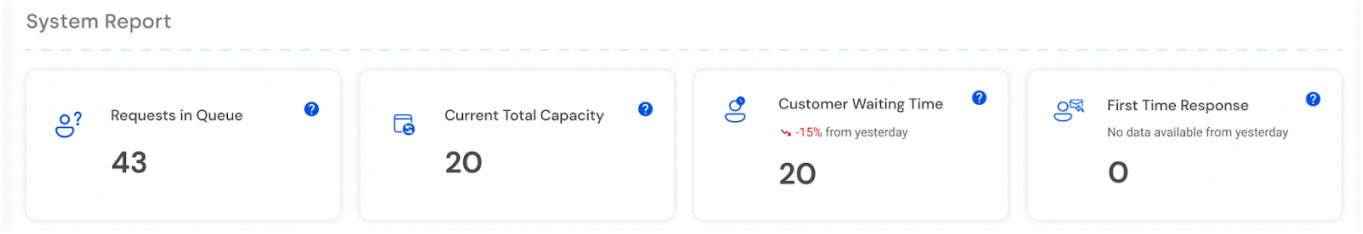
Real Time Chat Report Ongoing Chats, Follow Up Leads, Customers Reported

System report

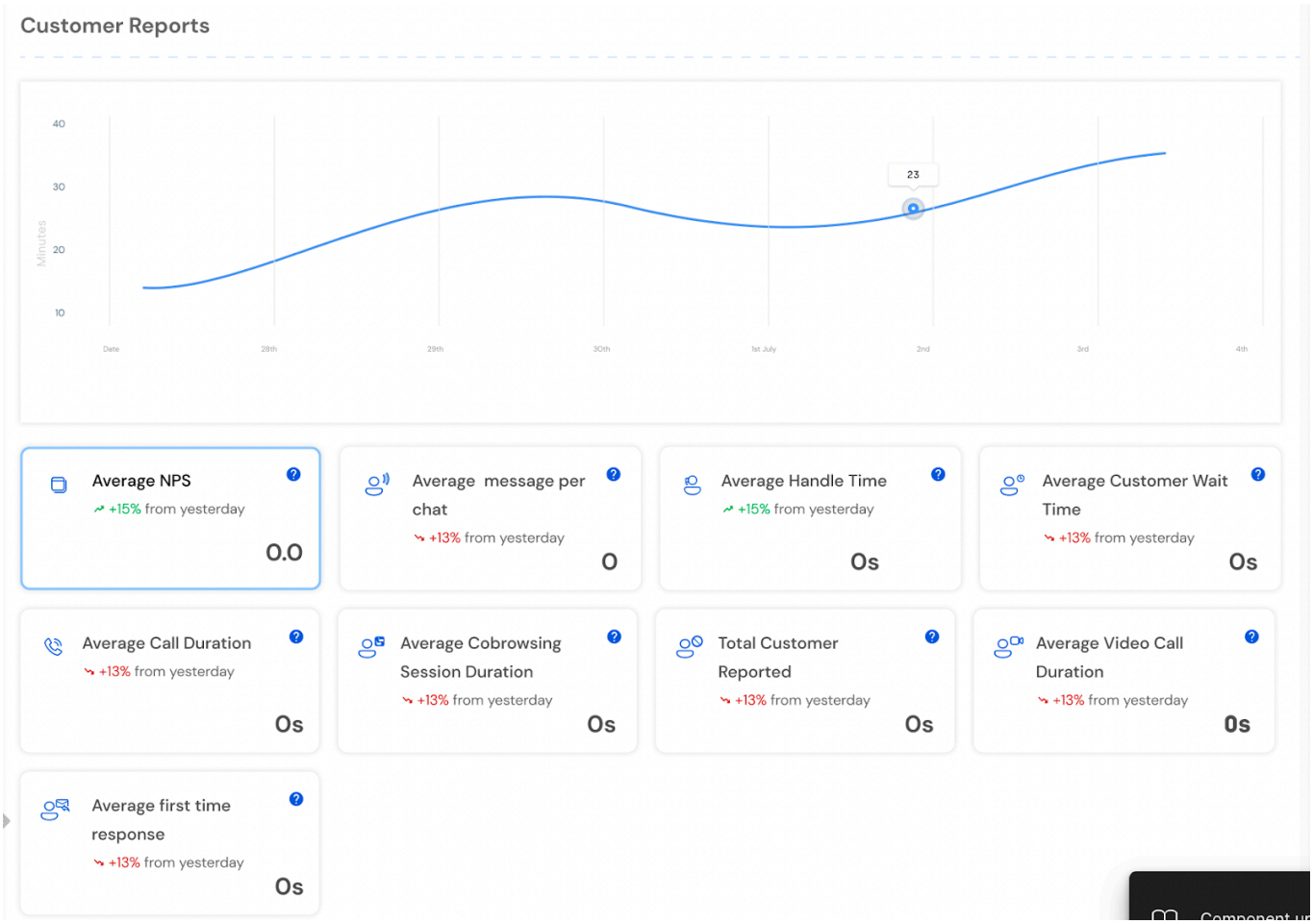
Request in queue, Current total capacity, Customer waiting time, First-time report analytics
First Time Response AnalyticsFTR or First Time Response will be now captured in LiveChat,

which will be calculated the amount of time taken by an agent to reply to any interaction for the first time after it was assigned to them.

This is visible under LiveChat Console Admin Login > Reports > Live Analytics > **System Report > First Time Response**

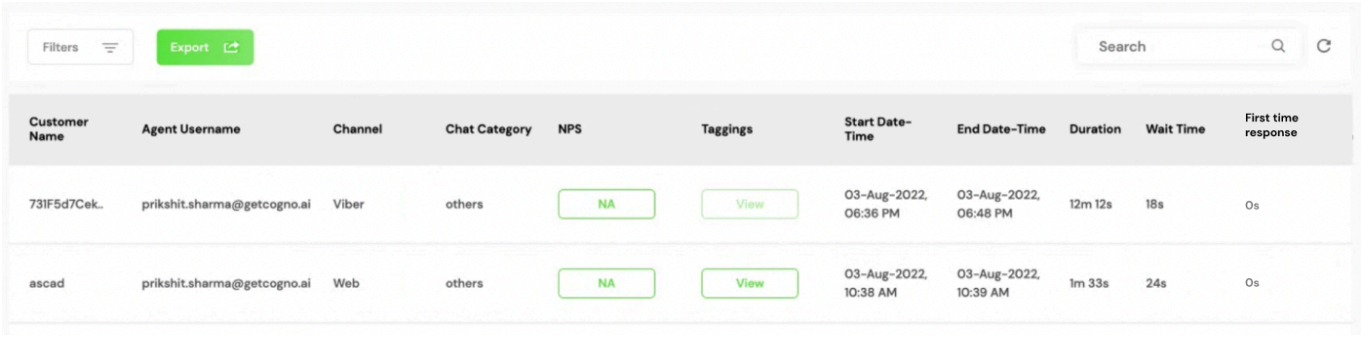


This will capture the average time taken by agents to respond to an interaction when they are assigned for the first time. This is visible under LiveChat Console Admin Login > Reports > Live Analytics > **Combined Report > Average First Time Response**



Chat History Section

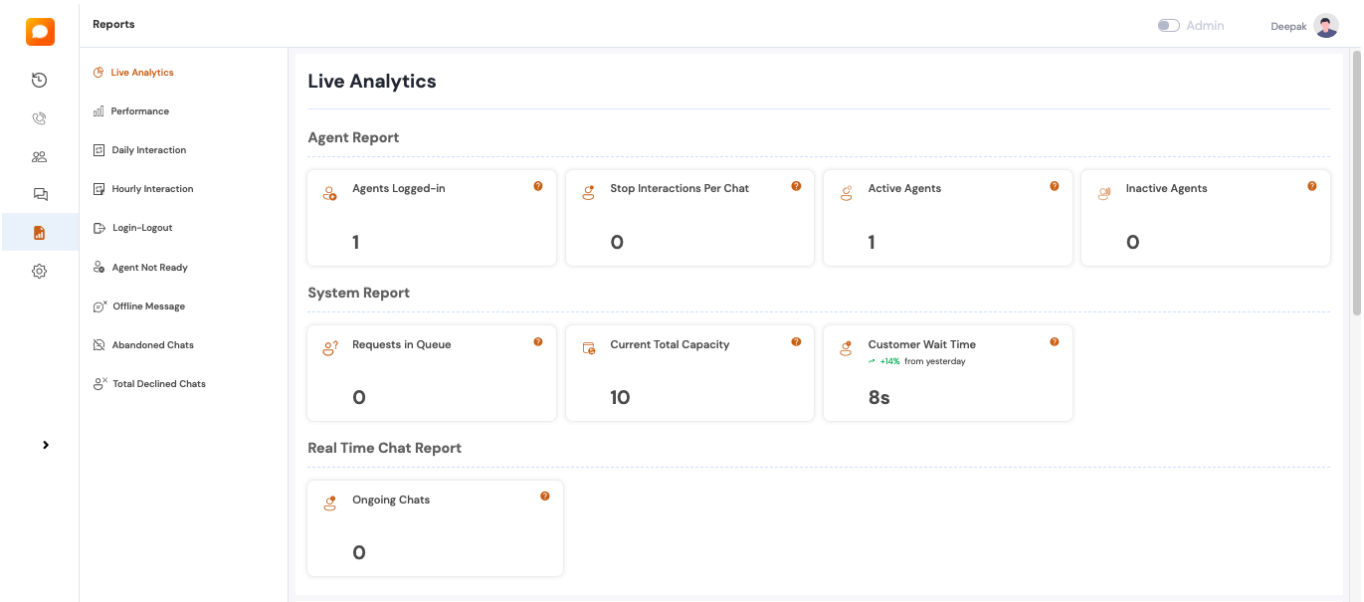
The chat history section will now capture the FTR (in seconds) for each individual interaction and showcase it on the Supervisor and Admin dashboard.

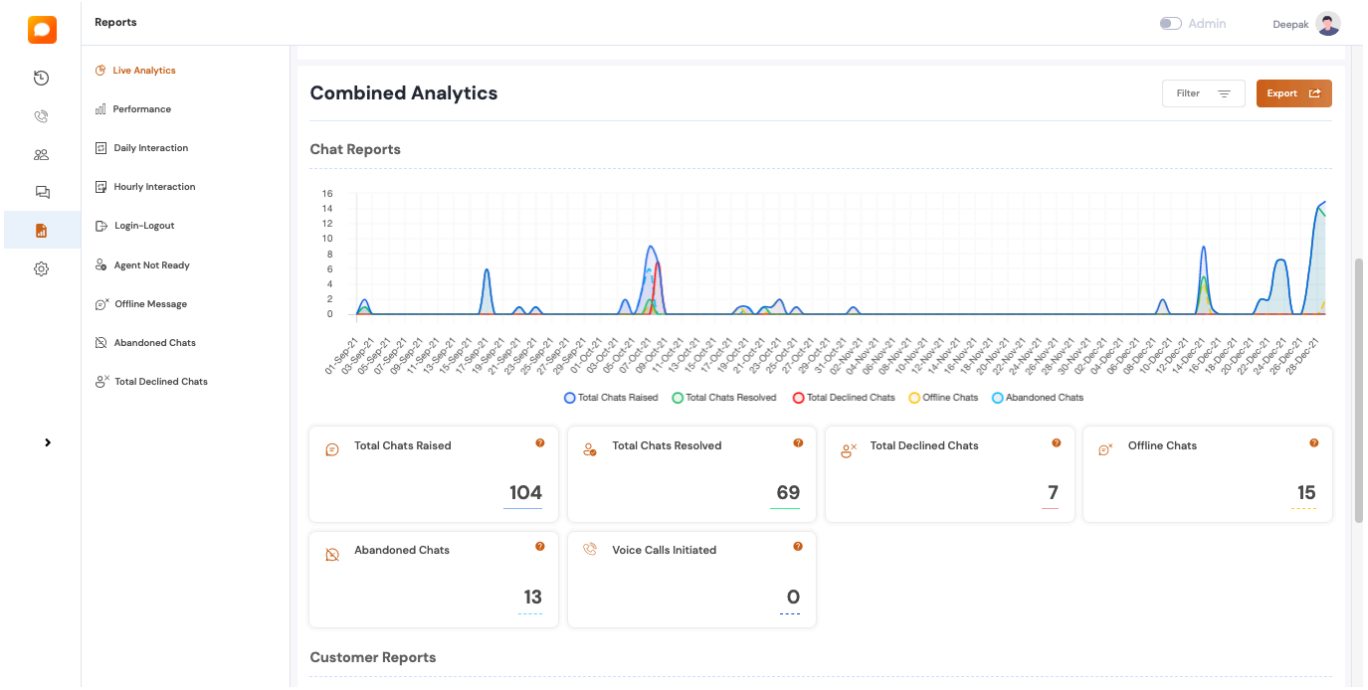


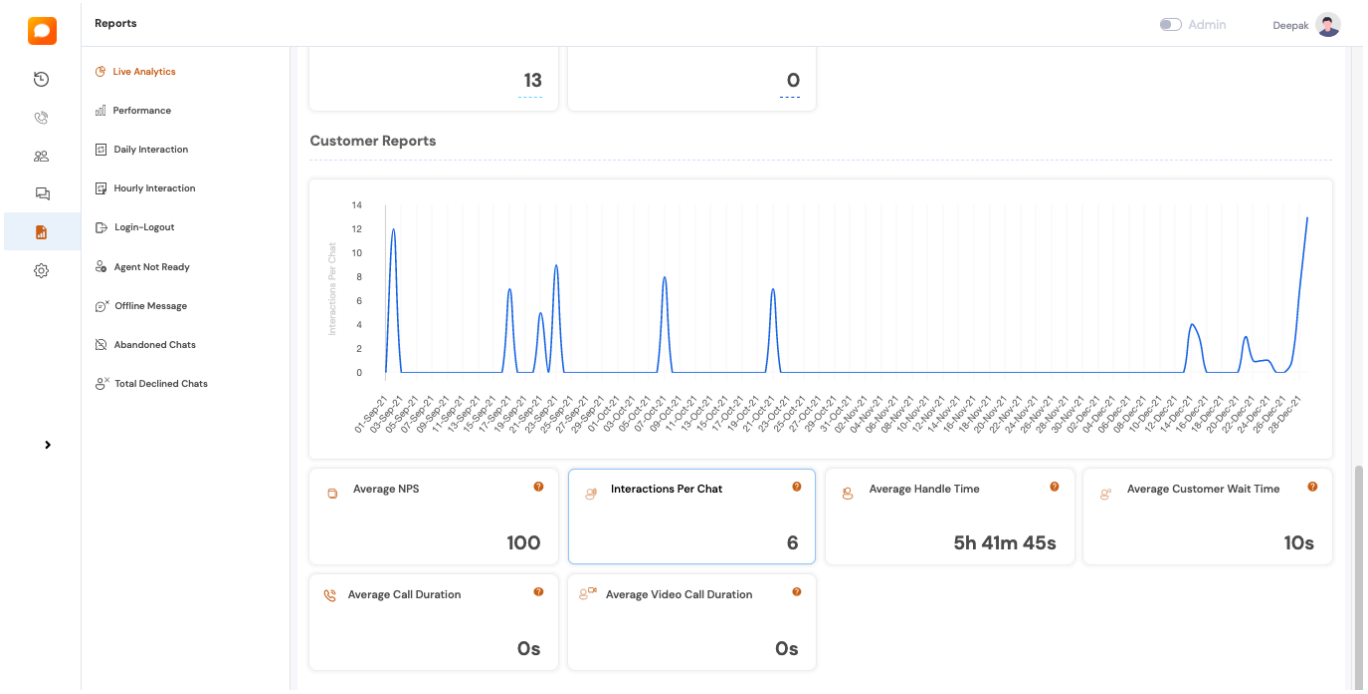
This information can also be exported in the Exported reports.

Customer Report Average NPS, Interactions per chat, Average handle time

The Admin can view real-time analytics to keep a track of the LiveChat system.







If a date range is selected, the widget must showcase cumulative values for those widget.

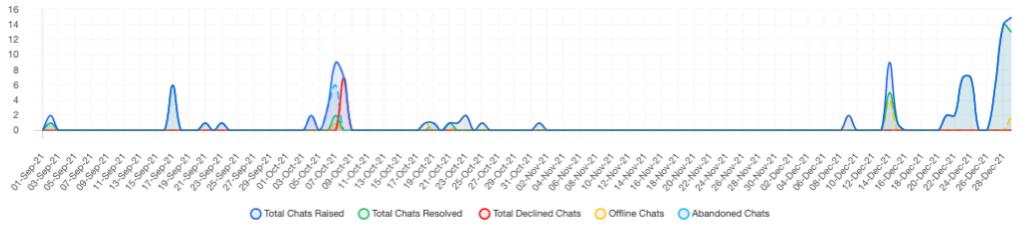
Live Analytics
Performance
Daily Interaction
Hourly Interaction
Login-Logout
Agent Not Ready
Offline Message
Abandoned Chats
Total Declined Chats

Combined Analytics

Filter

Export

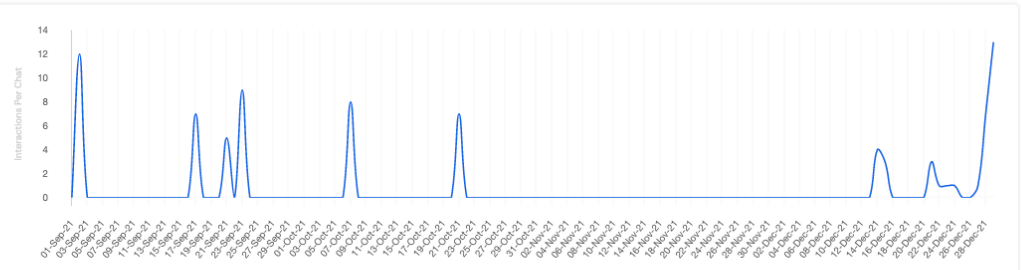
Chat Reports



Total Chats Raised	Total Chats Resolved	Total Declined Chats	Offline Chats
104	69	7	15

Abandoned Chats	Voice Calls Initiated
13	0

Customer Reports



Average NPS	Interactions Per Chat	Average Handle Time	Average Customer Wait Time
100	6	5h 41m 45s	10s

Average Call Duration	Average Video Call Duration
0s	0s

Reports

Admin

Deepak

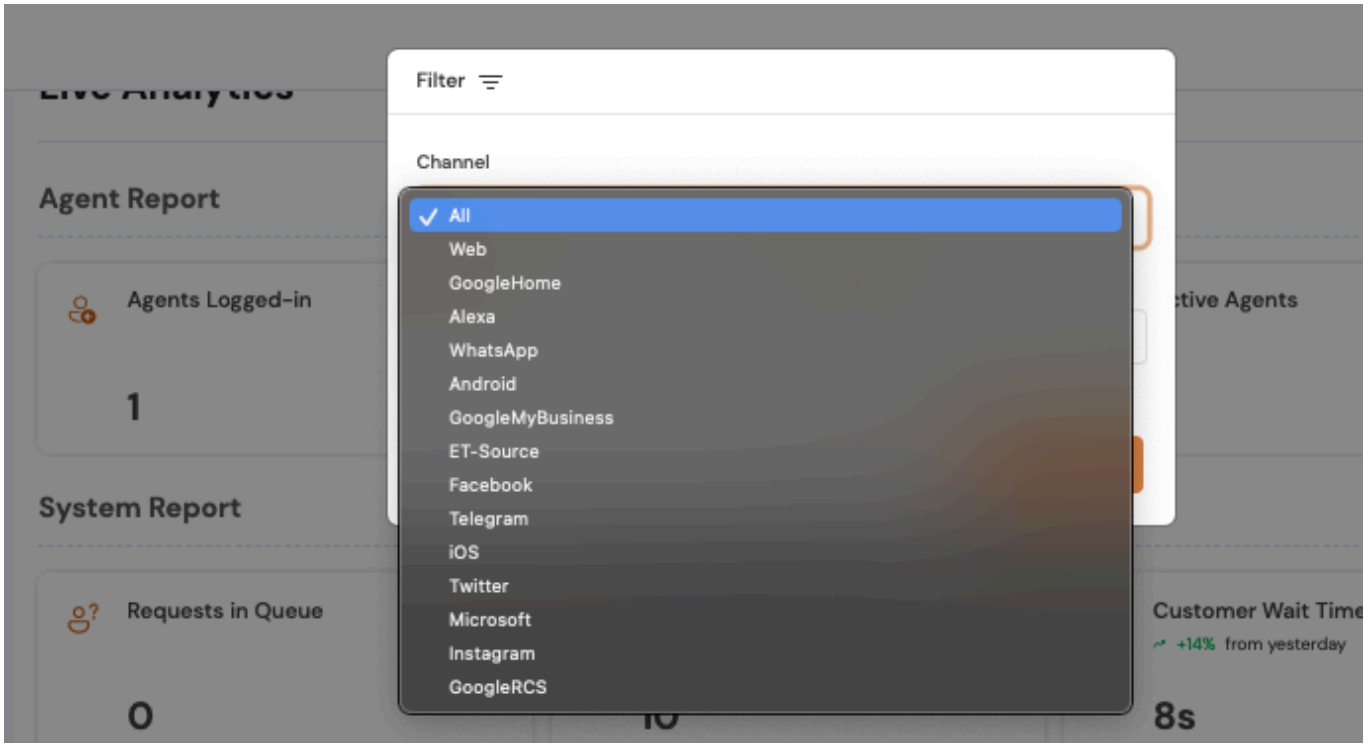
Live Analytics
Performance
Daily Interaction
Hourly Interaction
Login-Logout
Agent Not Ready
Offline Message
Abandoned Chats
Total Declined Chats

13

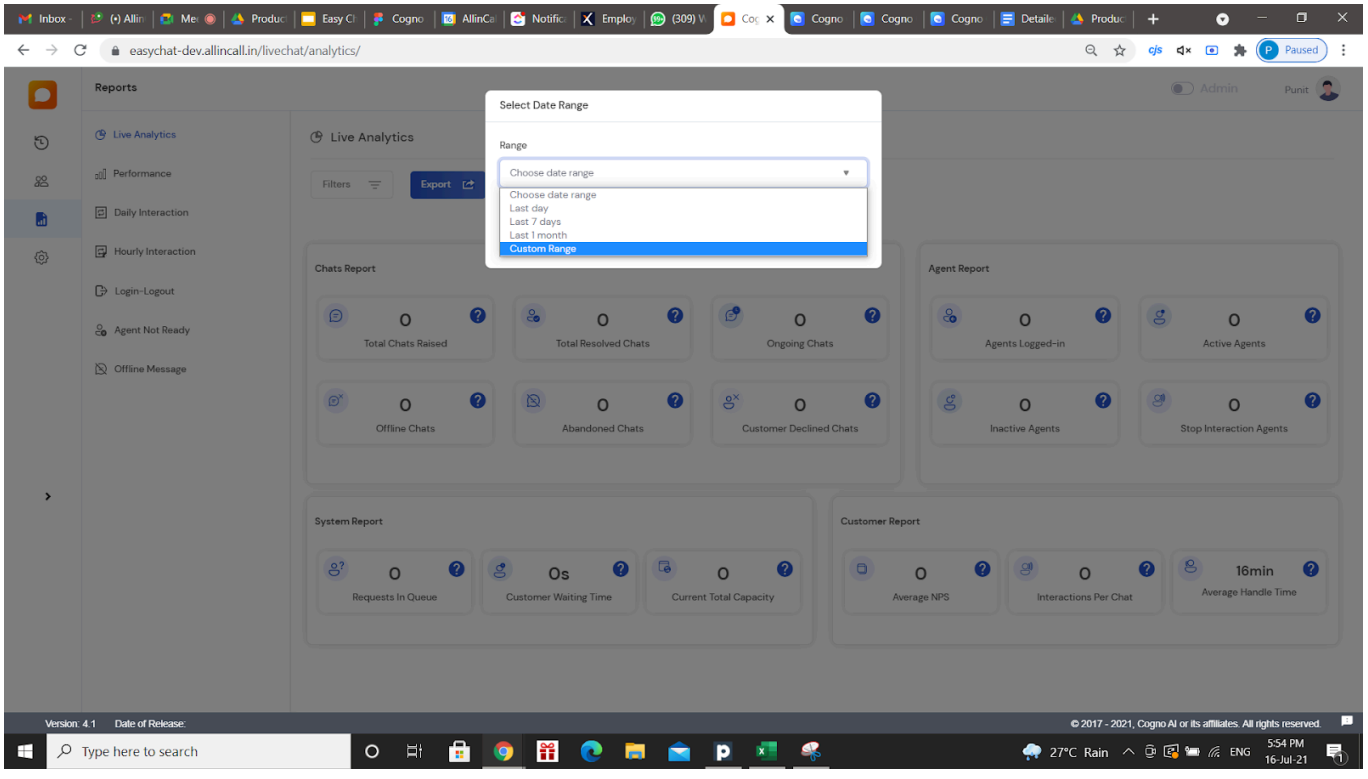
0

Customer Reports

LiveChat admin can select a date range and channel to filter out the values for better analysis.



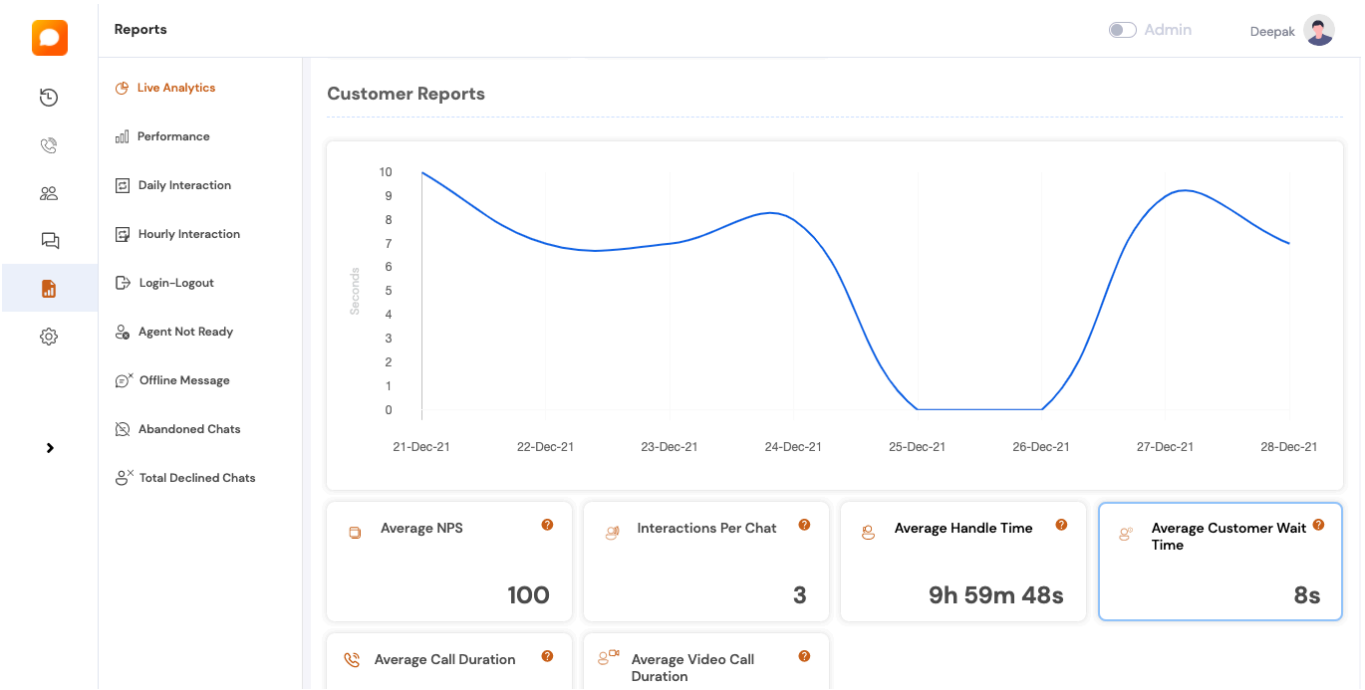
LiveChat admin can export the data into excel and has various option as Last day, last 7 days, last month and custom range.



Average Customer Wait Time

The **Average waiting time** of the customer is now available in the LiveChat reports.Also the UI for **'Live Analytics'** is improved.

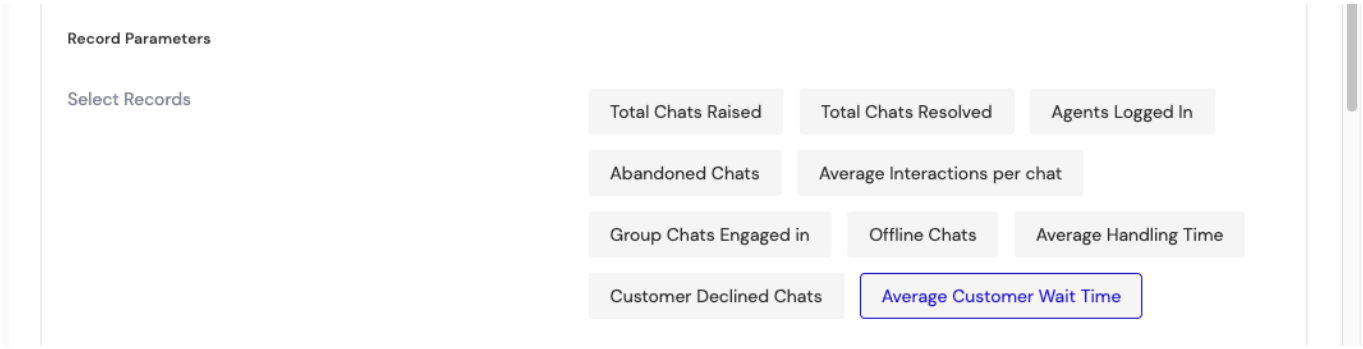
To configure : This is visible under : LiveChat Console (Admin) > Reports > LiveAnalytics > Customer Reports



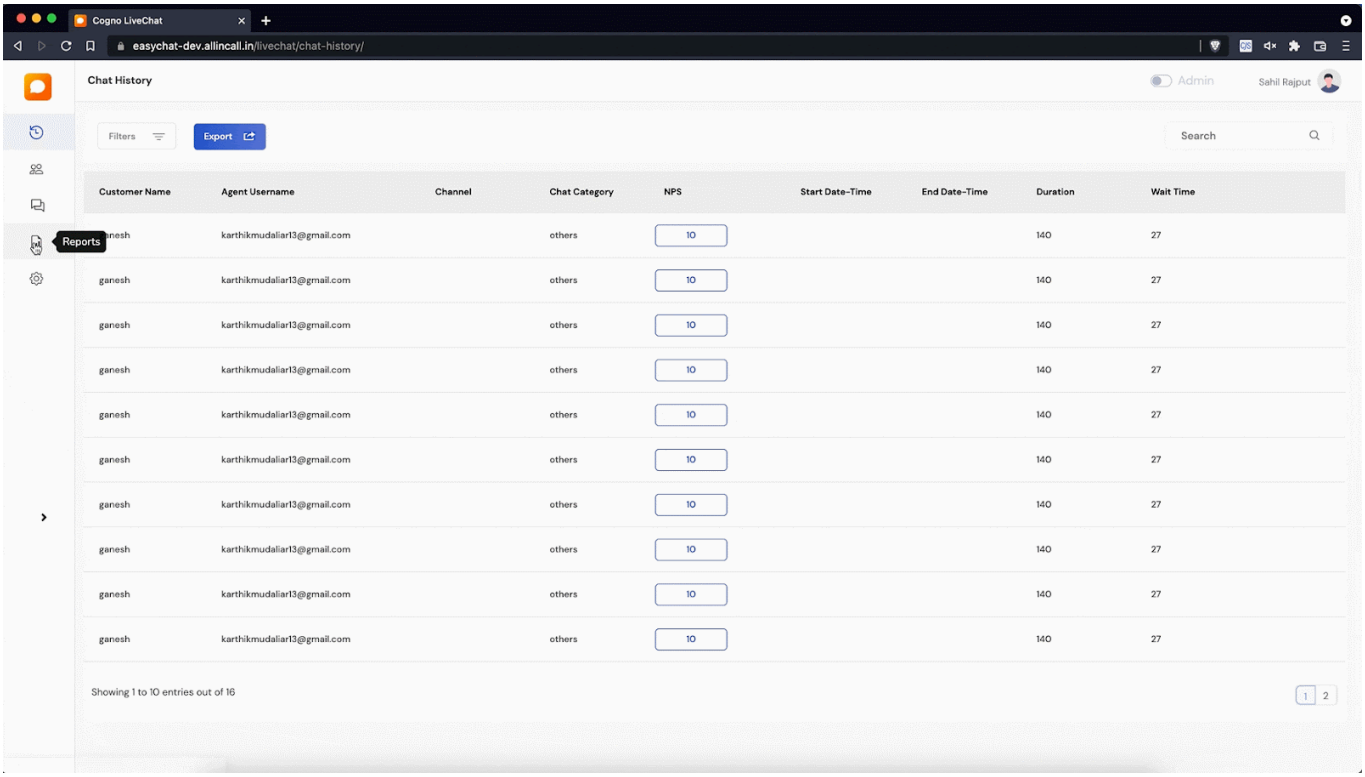
Customer Wait time is captured and showcased on the 'Live Analytics'. Average for this will be showcased as a widget in the 'Customer Reports Graph'. Please Note : this record will be captured on a day-to-day basis.

Also in Customer Reports, On clicking the Average Customer Wait Time it will showcase the graph captured for this value in the last 7 days.

An option to select Average customer wait time is added in mailer analytics reports. Along with this a column in the excel reports downloaded is added for the same.



Refer the below shown demo for better understanding

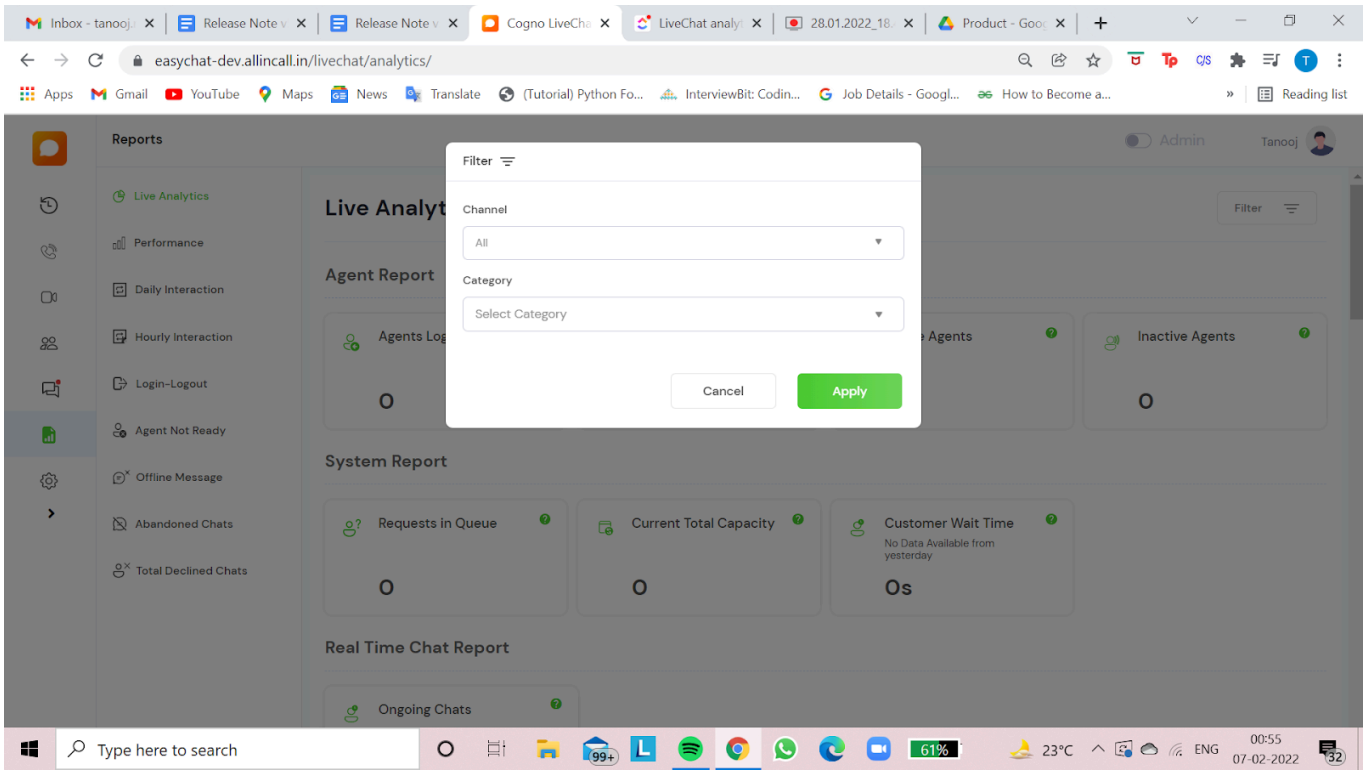


Please note : (Limitations)

1. For mailer analytics, the data for 'Average Customer Wait Time' will be sent only on selecting the parameter in the mailer analytics.

LiveChat Analytics Based on Category

The analytics section in LiveChat can be filtered according to the different categories. The combined analytics can be grouped together on the basis of categories and specific dates.



This is visible under LiveChat Console Login > Reports > LiveAnalytics & Combined Analytics

Live Analytics

Filter

Agent Report

Agents Logged-in
1.2K

Stop Interactions per Chat
234

Active Agents
65

Inactive Agents
12

System Report

Requests in Queue
43

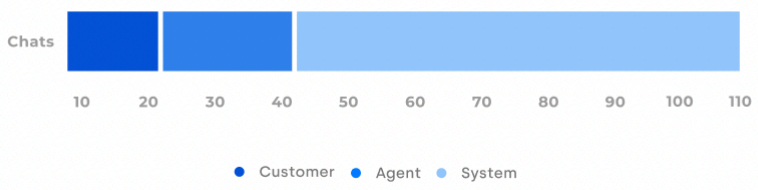
Current Total Capacity
20

Customer Waiting Time
-15% from yesterday
20

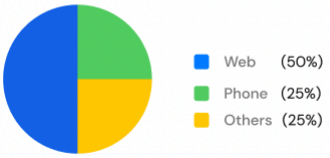
Real Time Chat Report

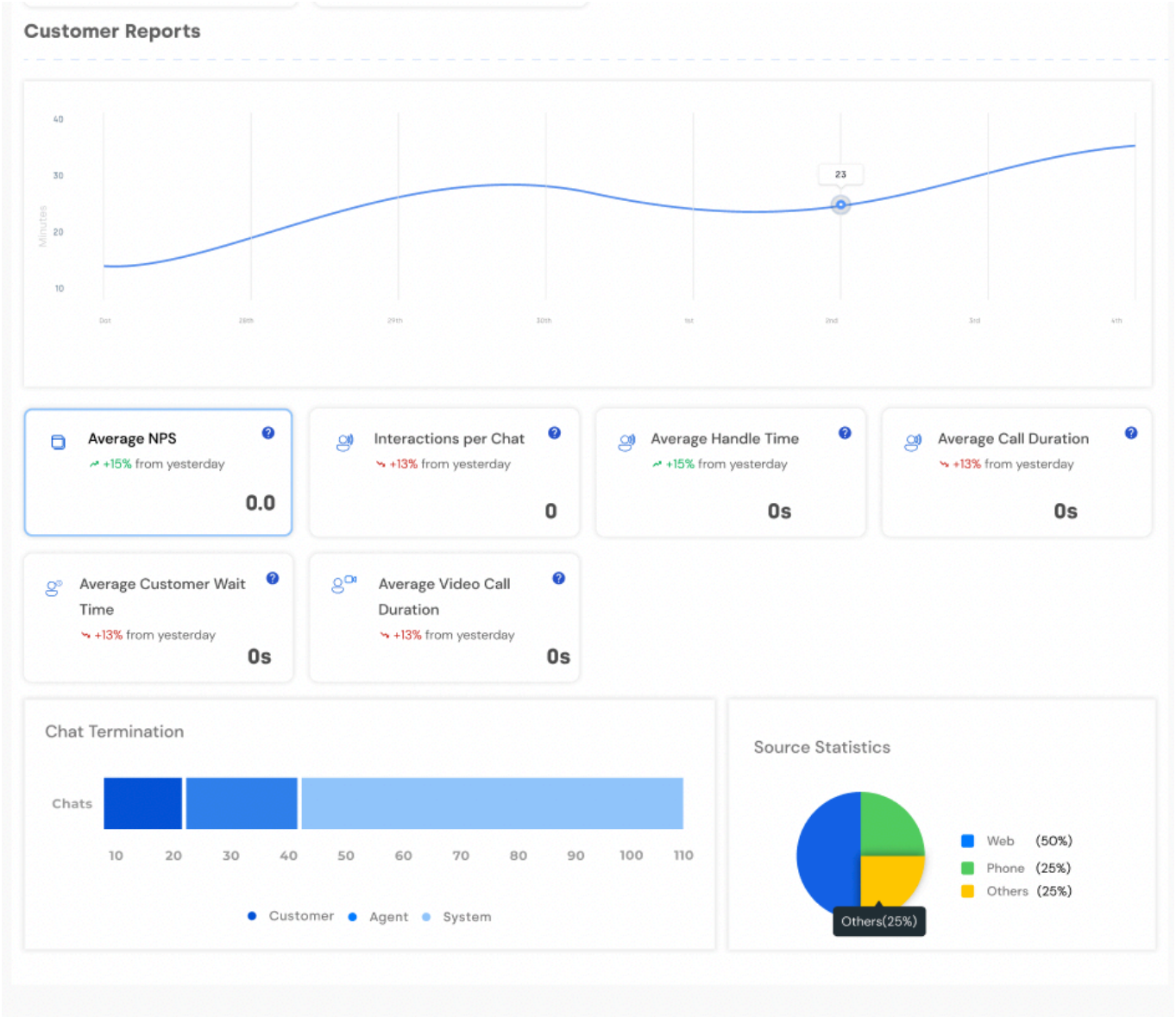
Ongoing Chats
-15% from yesterday
23

Chat Termination



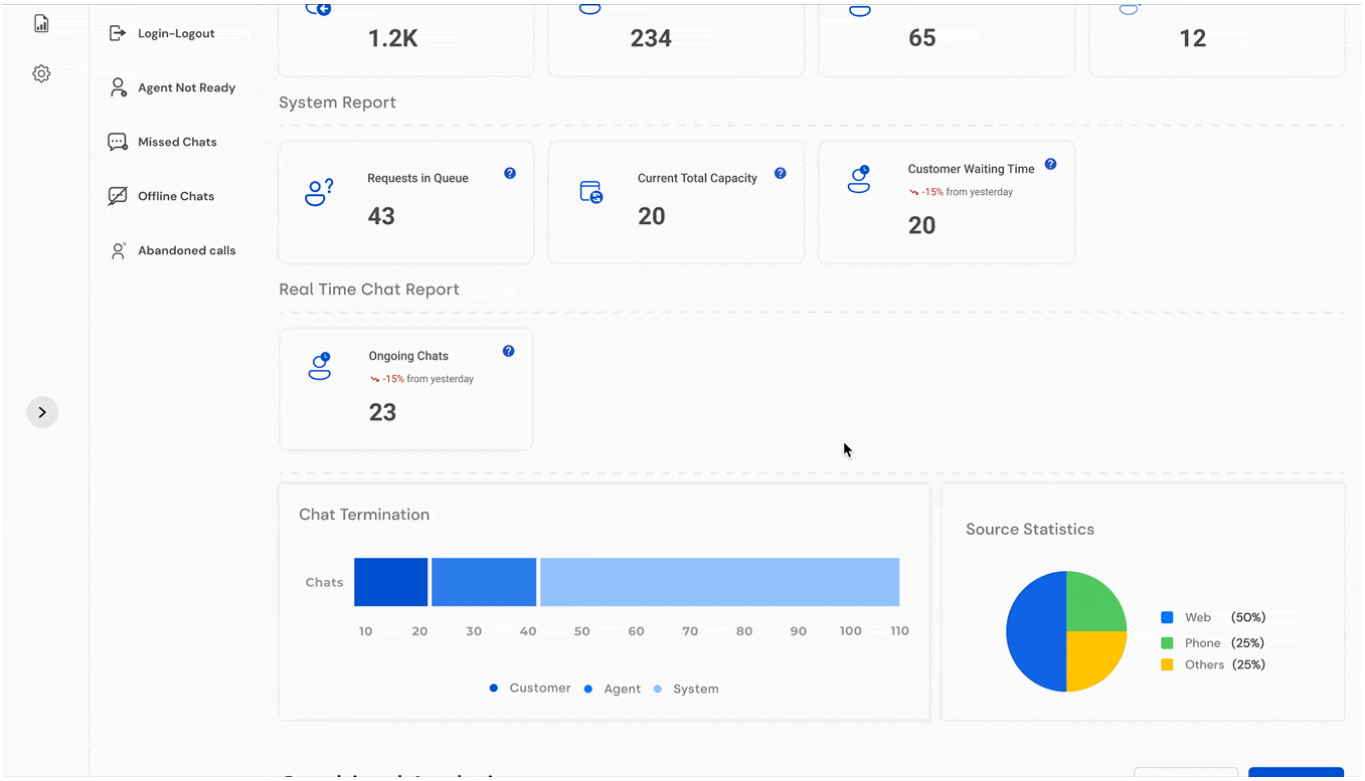
Source Statistics





The pie chart in the Live Analytics sub-section will showcase the bifurcation based on real-time end-customers same as for the rest of the analytics in this sub-section.

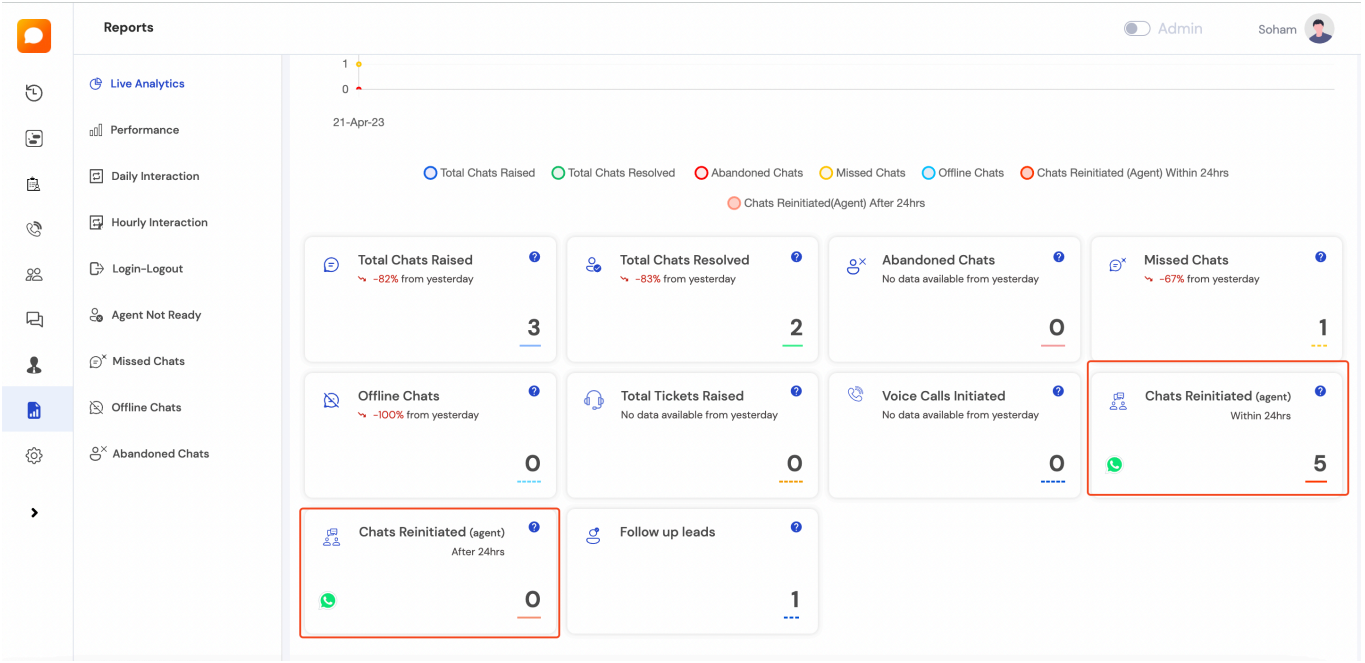
The pie-chart in the Combined Analytics sub-section will showcase the bifurcation based on the filter of the time range selected.



Limitation: Currently, the system considers iPads or any kind of tablet under the mobile device bracket.

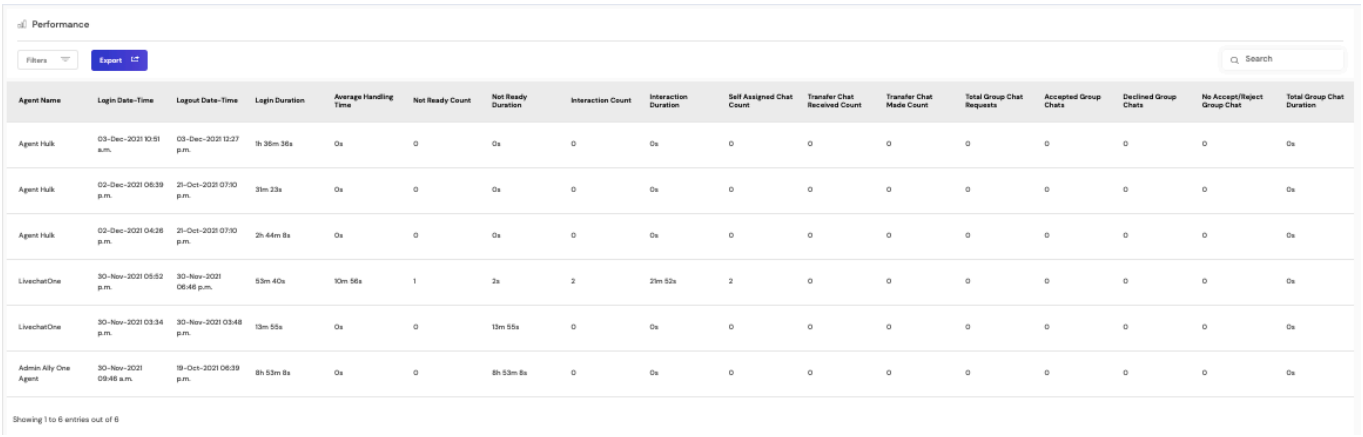
Whatsapp Session Reinitation Data

"Combined Analytics" will now feature two new cards displaying chat reinitiations before and after the 24-hour WhatsApp session. The “Chats Reinitiated (agent) After 24hrs” card shows business-initiated chats initiated after 24 hr session expires and the “Chats Reinitiated (agent) Within 24hrs” card displays business initiated chats within 24 hours. Disabling the "Allow agent to resume the conversation on WhatsApp" toggle hides both cards and excludes them from Excel exports. Data for these cards can be filtered and exported.


Reports
Admin
Soham
Live Analytics
Performance
Daily Interaction
Hourly Interaction
Login-Logout
Agent Not Ready
Missed Chats
Offline Chats
Abandoned Chats
1
0
21-Apr-23
Total Chats Raised
Total Chats Resolved
Abandoned Chats
Missed Chats
Offline Chats
Chats Reinitiated (Agent) Within 24hrs
Chats Reinitiated(Agent) After 24hrs
Total Chats Raised
-82% from yesterday
3
Total Chats Resolved
-83% from yesterday
2
Abandoned Chats
No data available from yesterday
0
Missed Chats
-67% from yesterday
1
Offline Chats
-100% from yesterday
0
Total Tickets Raised
No data available from yesterday
0
Voice Calls Initiated
No data available from yesterday
0
Chats Reinitiated (agent)
Within 24hrs
5
Chats Reinitiated (agent)
After 24hrs
0
Follow up leads
1

12.1.2.6.2. Performance

Performance Report

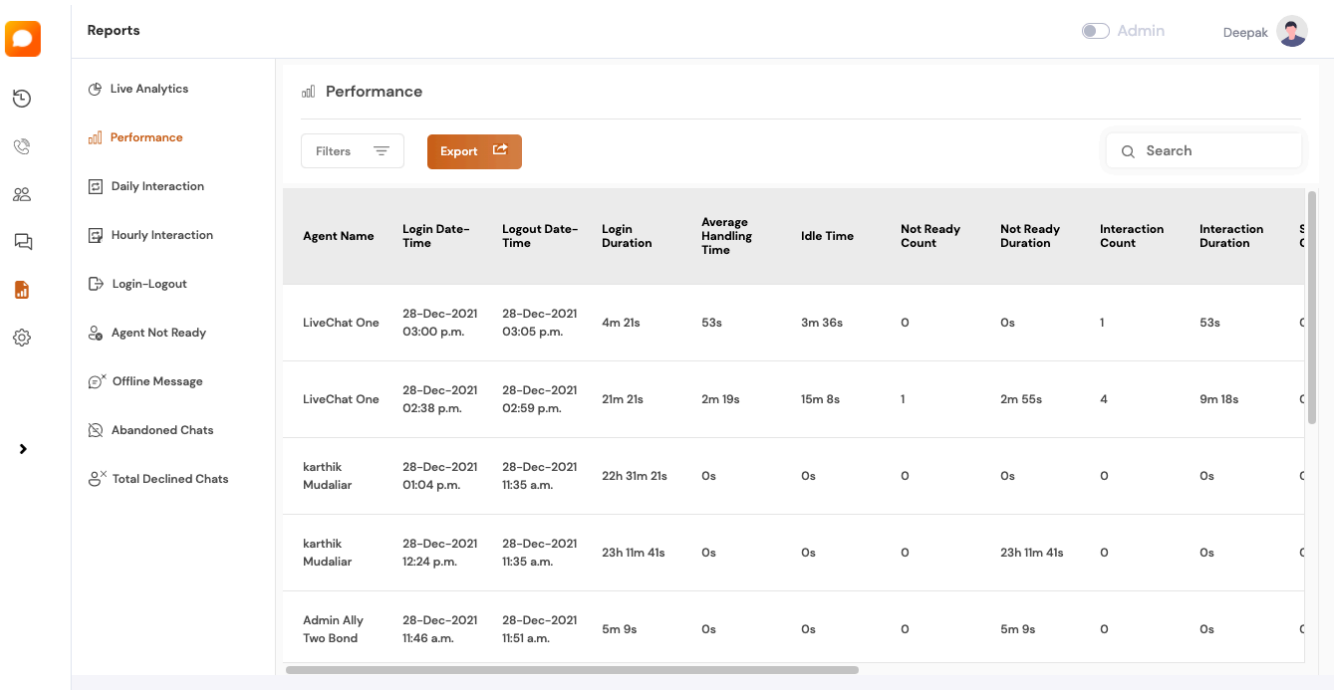


Along with other performance details of the agent like :

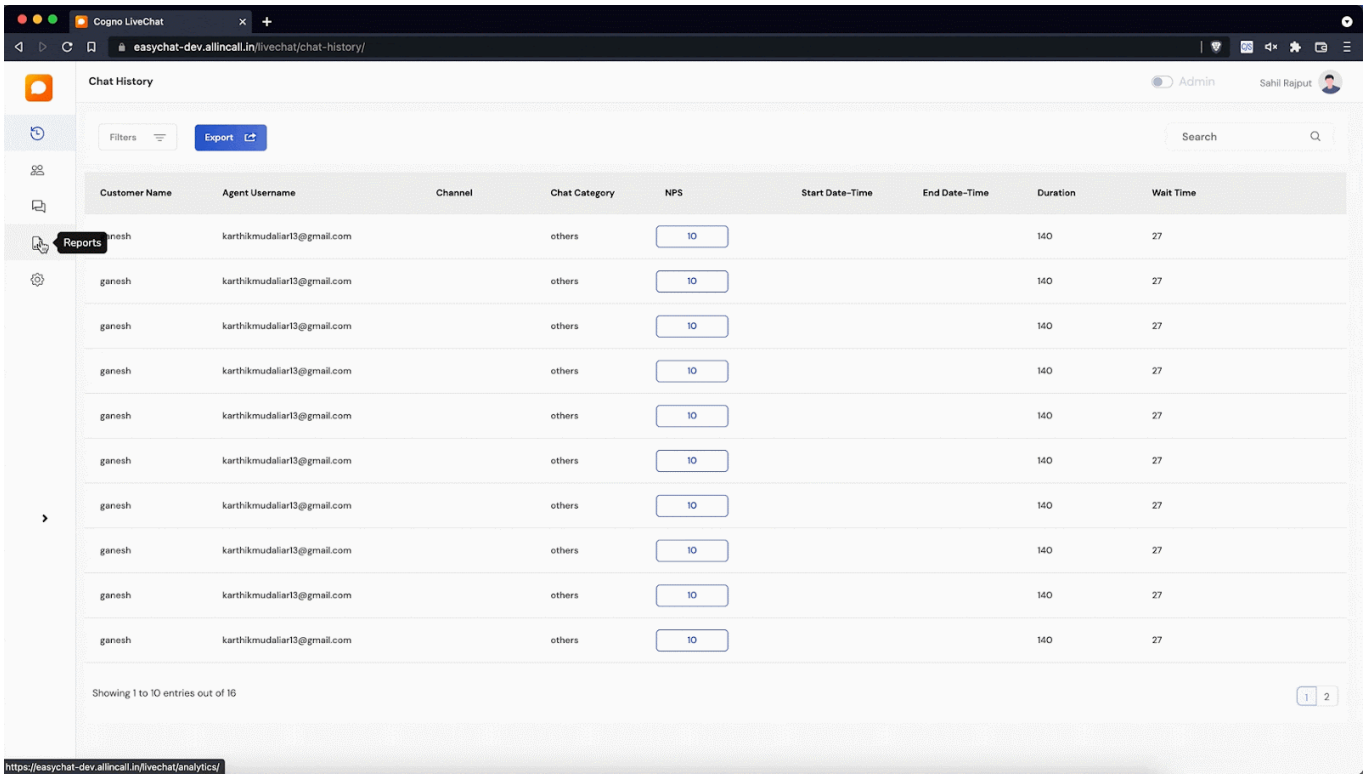
Agent NameLogin Date - TimeLogout Date -TimeLogin DurationAgent Idle TimeAverage Handle TimeNot Ready CountNot Ready DurationInteraction CountInteraction DurationsSelf Assign Chat CountTransfer Chat Received CountTransfer Chat Made CountTotal Group Chat RequestAccepted Group Chat Request Declined Group Chat Request Total Duration of Group Chat

Agent's Idle Time An option is provided in the Performance sub-tab of the Reports tab, where the information regarding the Idle Time of an agent is recorded and showcased.

This is visible under LiveChat (Admin) > Reports > Performance > Idle Time



The Idle time is calculated by monitoring the time period when the Agent was online and not part of any interaction. Refer the below shown demo for better understanding

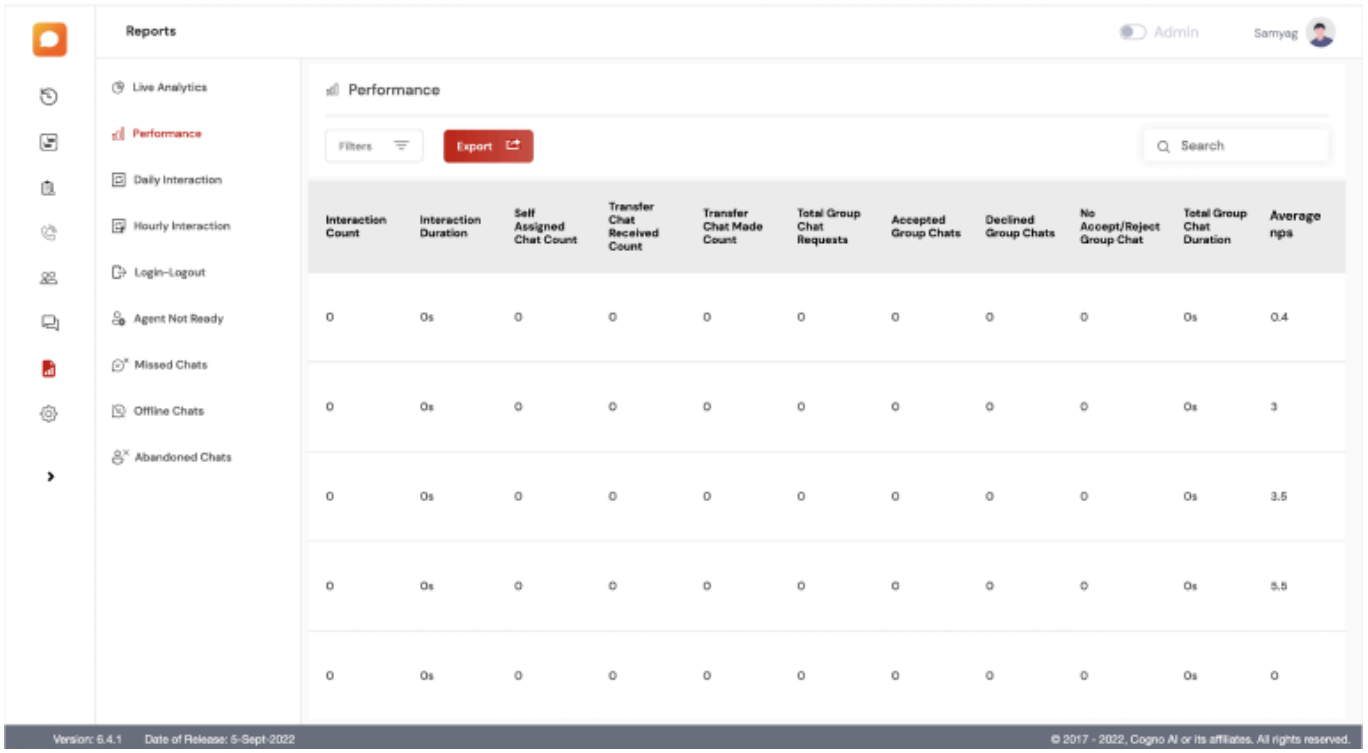


NPS in Reports

NPS received will be available in the reports being exported.

This is applicable for the following:

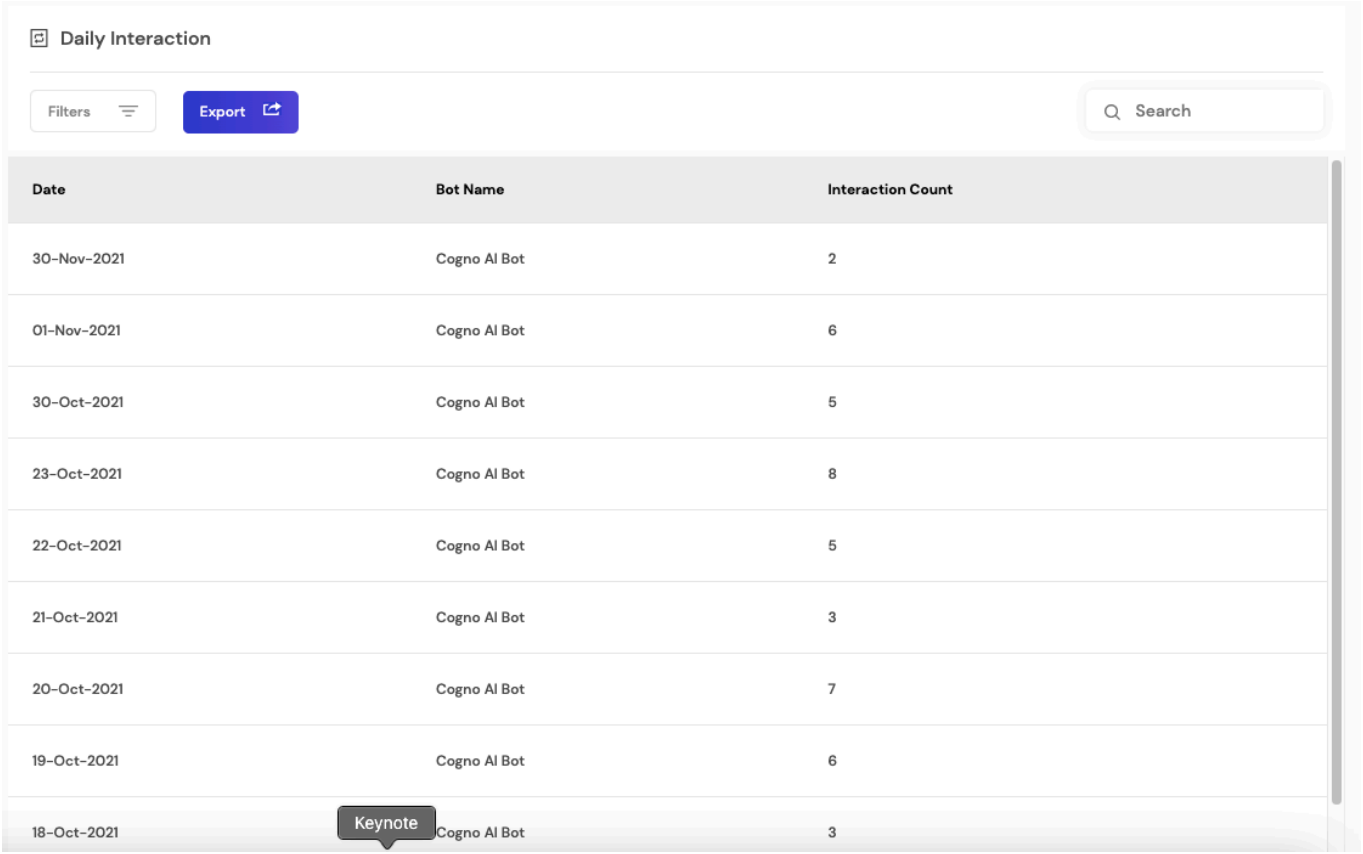
1. Chat History Report
2. Performance Tab
3. Mailer Analytics



Sample of the above-mentioned reports is available here.

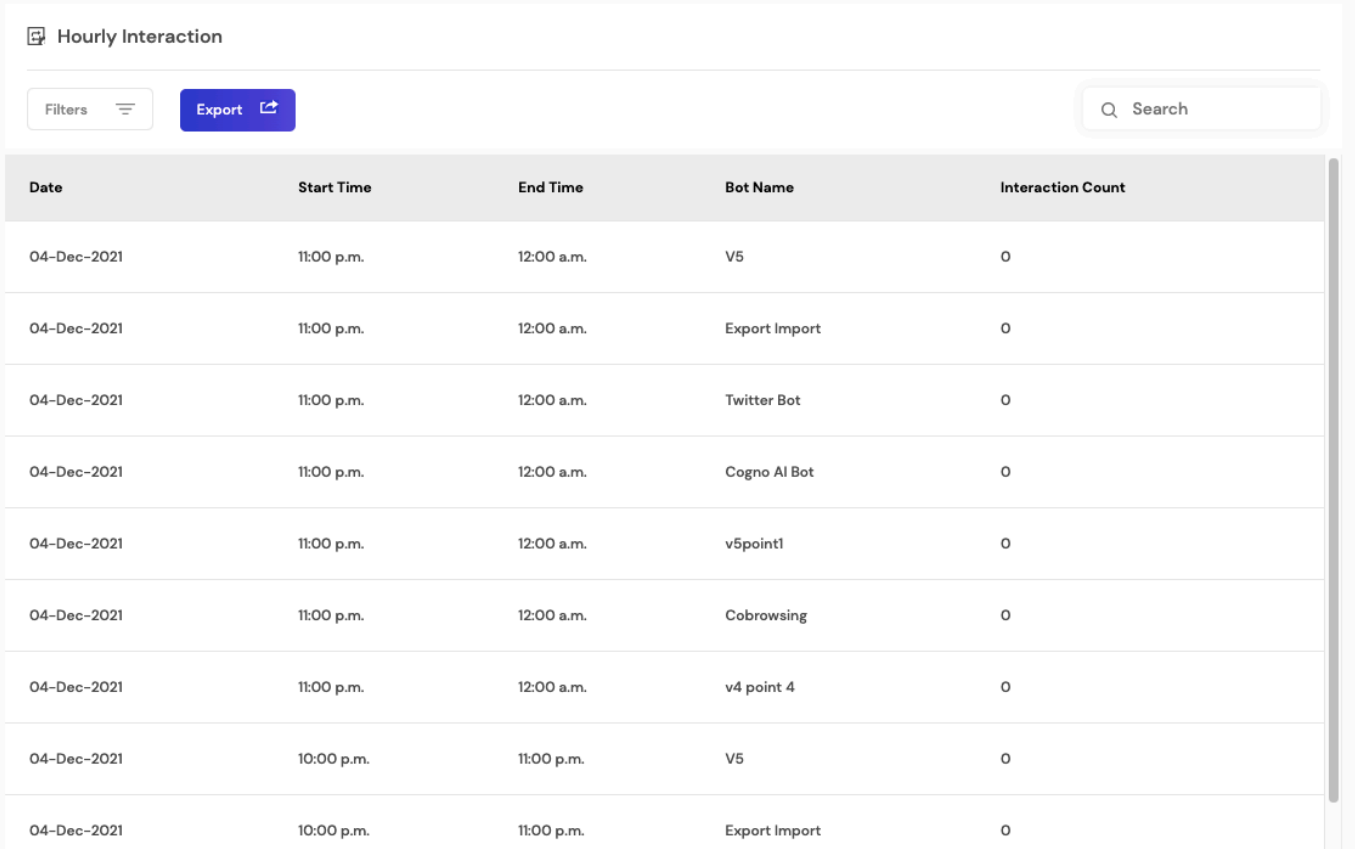
12.1.2.6.3. Daily Interaction

Daily Interaction Report



12.1.2.6.4. Hourly Interaction

Hourly Interaction Report

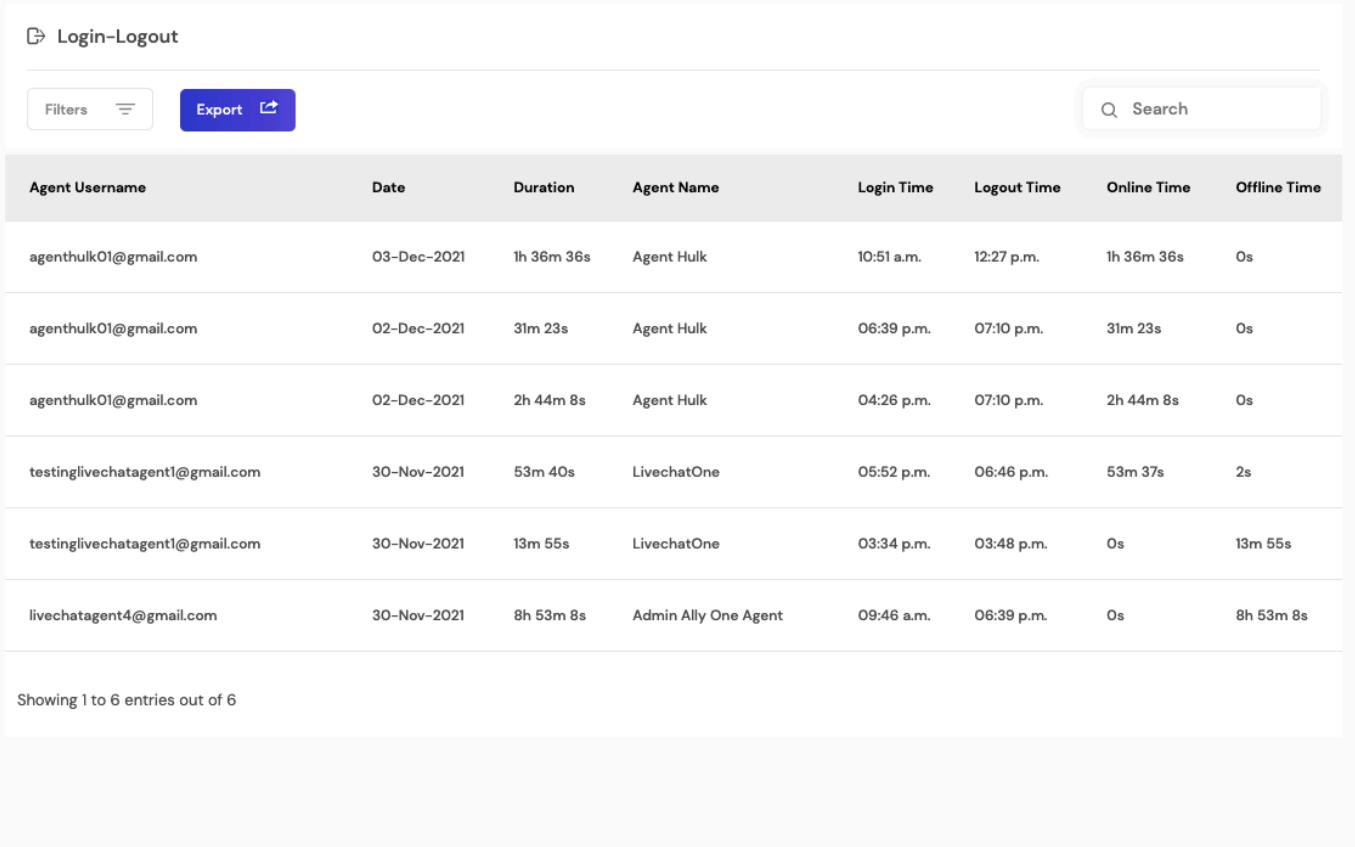


Date	Start Time	End Time	Bot Name	Interaction Count
04-Dec-2021	11:00 p.m.	12:00 a.m.	V5	0
04-Dec-2021	11:00 p.m.	12:00 a.m.	Export Import	0
04-Dec-2021	11:00 p.m.	12:00 a.m.	Twitter Bot	0
04-Dec-2021	11:00 p.m.	12:00 a.m.	Cogno AI Bot	0
04-Dec-2021	11:00 p.m.	12:00 a.m.	v5point1	0
04-Dec-2021	11:00 p.m.	12:00 a.m.	Cobrowsing	0
04-Dec-2021	11:00 p.m.	12:00 a.m.	v4 point 4	0
04-Dec-2021	10:00 p.m.	11:00 p.m.	V5	0
04-Dec-2021	10:00 p.m.	11:00 p.m.	Export Import	0

12.1.2.6.5. Login - Logout

Overview

This page holds the **Login – Logout** reporting reference (who logged in or out and when). For **how to sign in**, **Single Sign-On (SSO)**, or **how to sign out** from the product screens, use the related guides below.



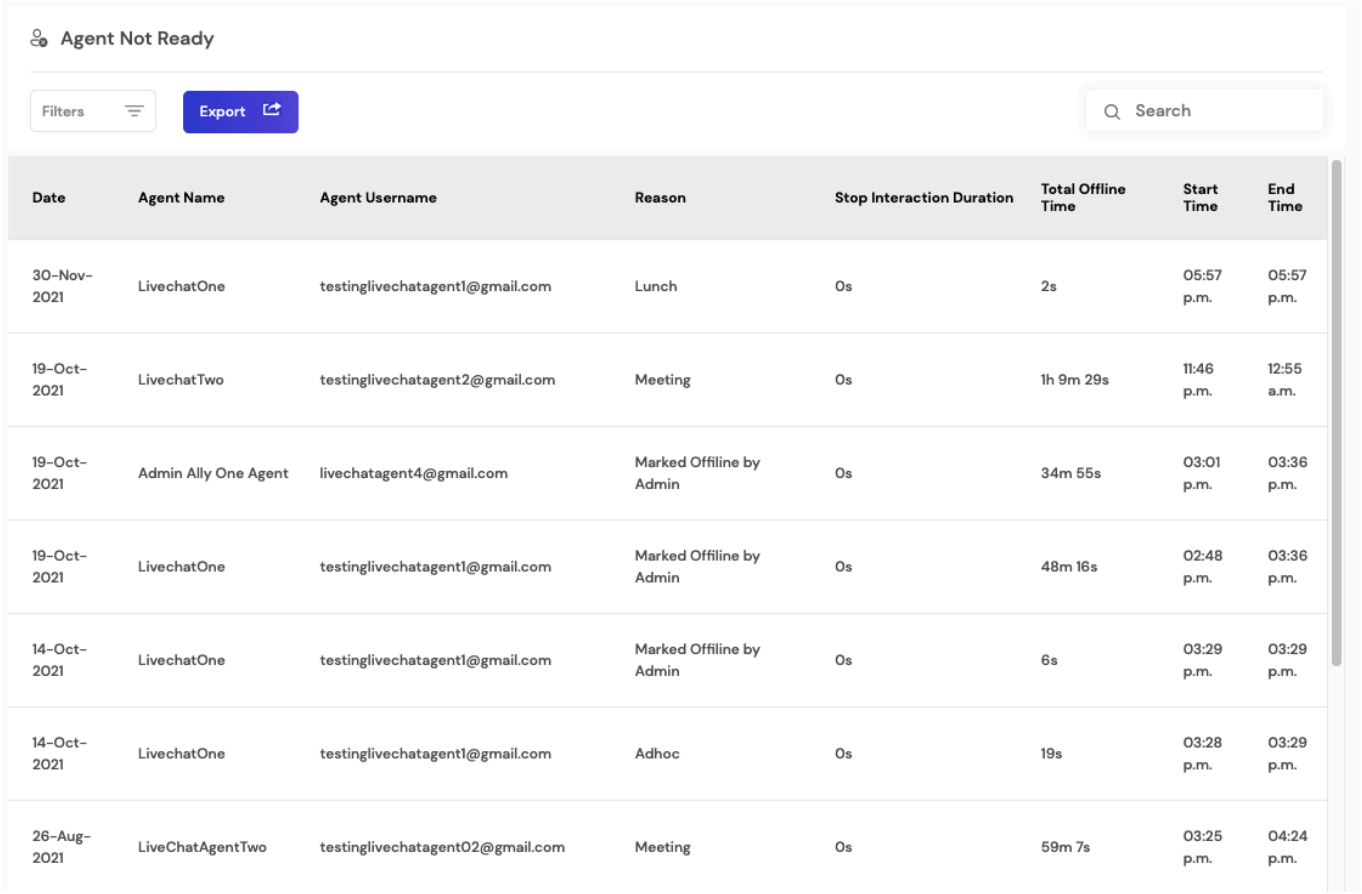
Related topics

- **User Login & Single Sign-On (SSO)** – Normal login, SAML, Google, and language selection on the web login page.
- **Administrator Login** – Signing in to the Administrator Console.
- **Supervisor Login** – Signing in to the Supervisor experience.
- **Logout from Ameyo** – Ending an agent session from the in-app menu.

12.1.2.6.6. Agent Not Ready

Overview

The **Agent Not Ready Report** captures every period during which an agent is logged in but not in the **Ready** state – break durations, after-call work, forced status changes, and system-induced not-ready states. Supervisors use it to audit break compliance and to investigate coverage gaps.



Date	Agent Name	Agent Username	Reason	Stop Interaction Duration	Total Offline Time	Start Time	End Time
30-Nov-2021	LivechatOne	testinglivechatagent1@gmail.com	Lunch	0s	2s	05:57 p.m.	05:57 p.m.
19-Oct-2021	LivechatTwo	testinglivechatagent2@gmail.com	Meeting	0s	1h 9m 29s	11:46 p.m.	12:55 a.m.
19-Oct-2021	Admin Ally One Agent	livechatagent4@gmail.com	Marked Offline by Admin	0s	34m 55s	03:01 p.m.	03:36 p.m.
19-Oct-2021	LivechatOne	testinglivechatagent1@gmail.com	Marked Offline by Admin	0s	48m 16s	02:48 p.m.	03:36 p.m.
14-Oct-2021	LivechatOne	testinglivechatagent1@gmail.com	Marked Offline by Admin	0s	6s	03:29 p.m.	03:29 p.m.
14-Oct-2021	LivechatOne	testinglivechatagent1@gmail.com	Adhoc	0s	19s	03:28 p.m.	03:29 p.m.
26-Aug-2021	LiveChatAgentTwo	testinglivechatagent02@gmail.com	Meeting	0s	59m 7s	03:25 p.m.	04:24 p.m.

What the report shows

For each not-ready segment the report lists:

- Agent name and user ID.
- Break reason (including system-generated reasons such as *Auto Available*, *Missed Call*, *System Break*).
- Start timestamp, end timestamp, and total duration.
- The contact-centre / process the agent was in when the status changed.

- Whether the break was forced by a Supervisor.

Privileges

Privilege Key	Description	Default roles
`contactcenter:dacx-cc.reports.view-not-ready:invoke-access`	Run and view the Agent Not Ready report	Administrator, Supervisor
`campaign:dacx-campaign.monitor.user-mgmt.view-user-runtime:invoke-access`	Needed to populate real-time break counters on dashboards	Group Manager, Supervisor

Configuration parameters

Key / parameter	Description	How to configure	Constraints	Sample
Break Reasons	Master list of reason codes an agent can select when going not-ready.	Administrator > **System Configuration** > **Break Reasons**.	Label + optional icon + max duration.	`Lunch (30 min)`.
`allowBreakReasonSwitch`	Whether an agent can switch directly from one break reason to another without going Ready first.	Administrator > **System Configuration** > **Server Preferences** > **Break**.	On/Off. Default Off.	On for support teams.
Break threshold (monitoring parameter)	Maximum permitted **duration for one continuous break** of a given reason, used by the contact-center runtime and Live Monitoring.	Administrator > **Campaign** (voice) > configuration where **campaign monitoring parameter thresholds** are maintained (per campaign; parameter names align with break reasons). Colours for breached rows are adjusted separately under Supervisor **Process Settings** > **Color Configuration**.	Seconds, per break-reason parameter. Must be configured for the agent to receive a duration breach alert.	`1800` (30 minutes).
`showTotalBreakDurationInWebaccess`	Whether the agent web access / toolbar experience may surface **total break duration** stats (when the product build exposes that widget).	Administrator > **System Configuration** > **Server Preferences** (Customer Manager / preference store).	Boolean. Default **On**.	On.

Break duration vs break count

Break duration over limit (agent alert)

When the administrator has configured a **maximum duration** for the agent's **current** break reason at **campaign** level (monitoring parameter thresholds), and the agent remains on that break longer than the allowed time, the logged-in agent receives an **application notification** in the console header (notification bell area): the product treats this as a **break limit exceeded** style alert for that break type. The alert is directed to **that agent only** (not a broadcast to supervisors). After the agent returns to **Ready** (or otherwise leaves that break), the condition resets for a future break.

Break count (no dedicated agent alert)

Number of breaks in a day or interval is reflected in **reporting**, **supervisor monitoring**, and optional **self-service stats** in the agent experience where enabled. There is **no** separate built-in "break count exceeded" push to the agent comparable to the duration-threshold notification.

Supervisor visibility

Supervisors continue to see threshold breaches in the **Monitor** tab (row colouring and related indicators) according to campaign rules and **Color Configuration**; that is independent of whether the agent dismisses or reads their own notification.

Related pages

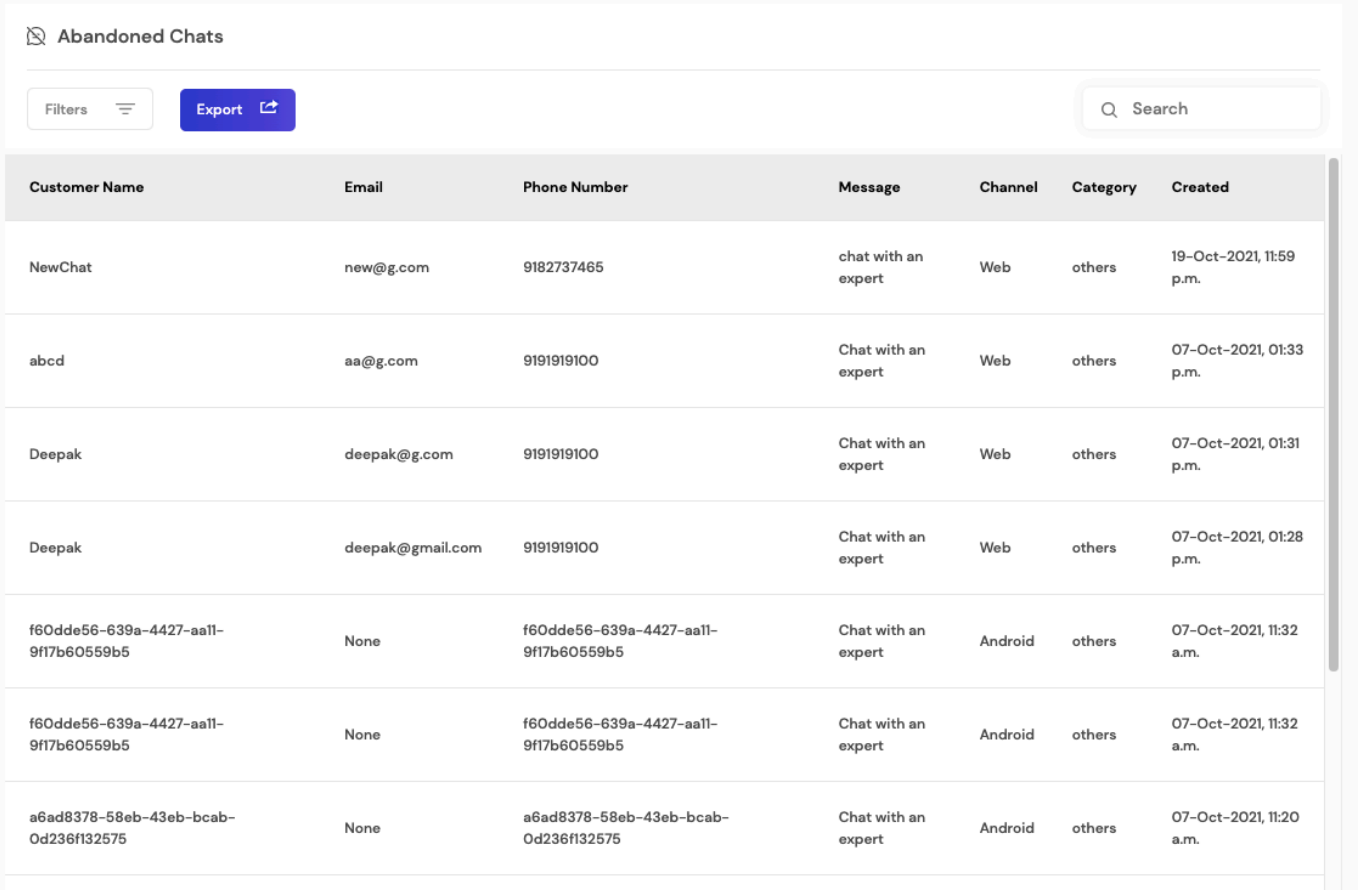
- **Agent Status Management** – how agents switch Ready / Not Ready / Break reasons.
- **Set Agent Availability** – sets Auto-Available and similar options; includes a short note on break-limit alerts.
- **Color Configuration** – supervisor-only colours for break reasons and threshold breach rows.
- **Monitor Tab Introduction** – where supervisors see live break and threshold breach indicators.
- **Reporting & Analytics** – master page listing all agent reports.
- **Agent Productivity** – productivity variant that also accounts for not-ready time.

12.1.2.6.7. Offline Message

Offline Message Report

12.1.2.6.8. Abandoned Chats

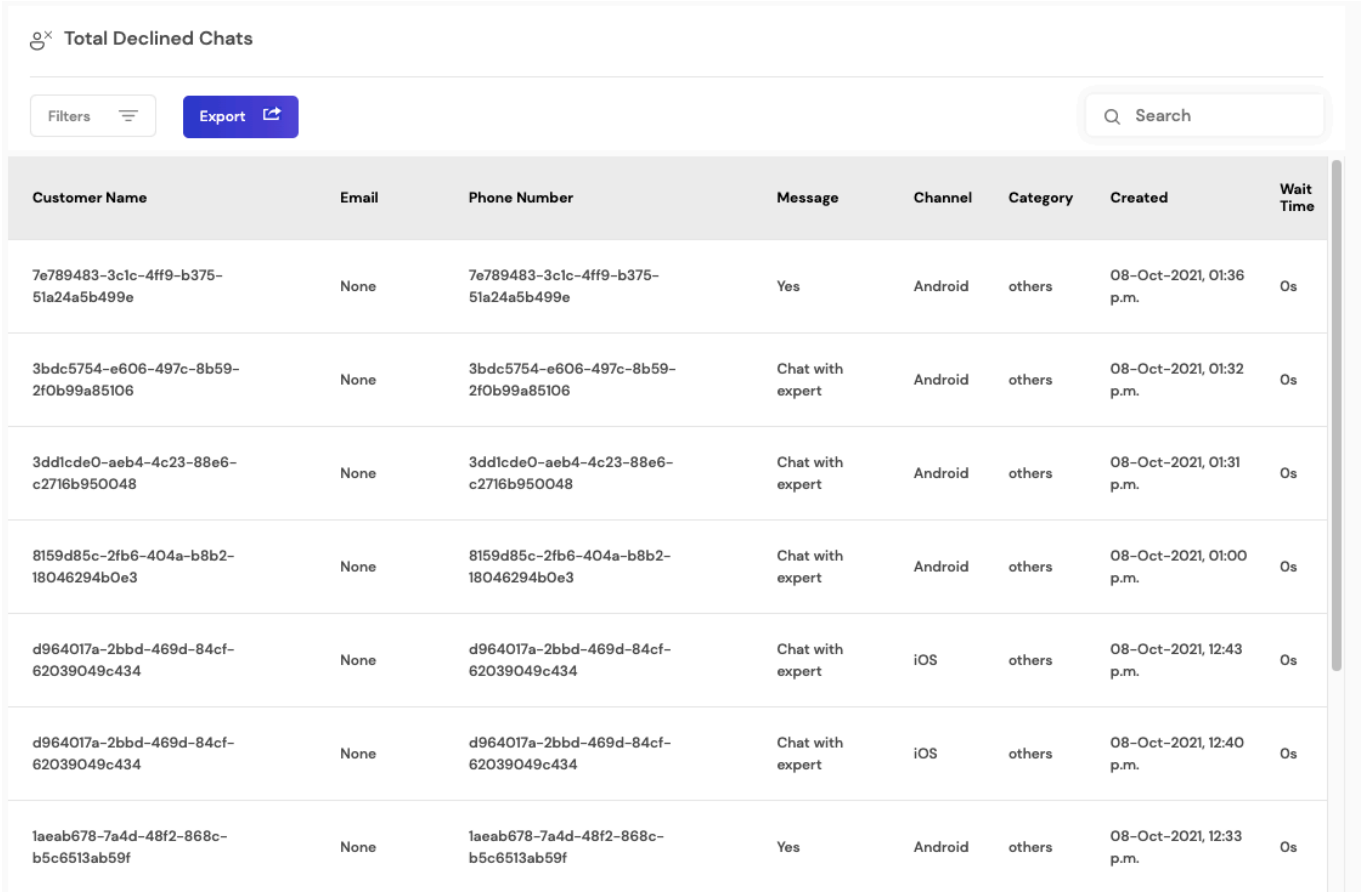
Abandoned Chats



Customer Name	Email	Phone Number	Message	Channel	Category	Created
NewChat	new@g.com	9182737465	chat with an expert	Web	others	19-Oct-2021, 11:59 p.m.
abcd	aa@g.com	9191919100	Chat with an expert	Web	others	07-Oct-2021, 01:33 p.m.
Deepak	deepak@g.com	9191919100	Chat with an expert	Web	others	07-Oct-2021, 01:31 p.m.
Deepak	deepak@gmail.com	9191919100	Chat with an expert	Web	others	07-Oct-2021, 01:28 p.m.
f60dde56-639a-4427-aa11-9f17b60559b5	None	f60dde56-639a-4427-aa11-9f17b60559b5	Chat with an expert	Android	others	07-Oct-2021, 11:32 a.m.
f60dde56-639a-4427-aa11-9f17b60559b5	None	f60dde56-639a-4427-aa11-9f17b60559b5	Chat with an expert	Android	others	07-Oct-2021, 11:32 a.m.
a6ad8378-58eb-43eb-bcab-0d236f132575	None	a6ad8378-58eb-43eb-bcab-0d236f132575	Chat with an expert	Android	others	07-Oct-2021, 11:20 a.m.

12.1.2.6.9. Total Declined Chats

Total Declined Chat Reports



Customer Name	Email	Phone Number	Message	Channel	Category	Created	Wait Time
7e789483-3c1c-4ff9-b375-51a24a5b499e	None	7e789483-3c1c-4ff9-b375-51a24a5b499e	Yes	Android	others	08-Oct-2021, 01:36 p.m.	0s
3bdc5754-e606-497c-8b59-2f0b99a85106	None	3bdc5754-e606-497c-8b59-2f0b99a85106	Chat with expert	Android	others	08-Oct-2021, 01:32 p.m.	0s
3dd1cde0-aeb4-4c23-88e6-c2716b950048	None	3dd1cde0-aeb4-4c23-88e6-c2716b950048	Chat with expert	Android	others	08-Oct-2021, 01:31 p.m.	0s
8159d85c-2fb6-404a-b8b2-18046294b0e3	None	8159d85c-2fb6-404a-b8b2-18046294b0e3	Chat with expert	Android	others	08-Oct-2021, 01:00 p.m.	0s
d964017a-2bbd-469d-84cf-62039049c434	None	d964017a-2bbd-469d-84cf-62039049c434	Chat with expert	iOS	others	08-Oct-2021, 12:43 p.m.	0s
d964017a-2bbd-469d-84cf-62039049c434	None	d964017a-2bbd-469d-84cf-62039049c434	Chat with expert	iOS	others	08-Oct-2021, 12:40 p.m.	0s
1aeab678-7a4d-48f2-868c-b5c6513ab59f	None	1aeab678-7a4d-48f2-868c-b5c6513ab59f	Yes	Android	others	08-Oct-2021, 12:33 p.m.	0s

12.1.2.7. Admin Settings

General Settings

In this tab, the setting has been made bot specific so the Admin can decide the following functionality by selecting the bot:

- Whether or not to assign agents based on their set category
- Enable/Disable Footer
- Maximum number of customers than an agent can talk to at a time
- Queue time(in seconds) - maximum time the customer will wait in the queue.
- Enable Supervisors to Create Groups
- Enable Customer Details Editing
- Enable Raise a ticket functionality for the Agent
- Enable self-assign option of chats at agent's end
- Enable Voice/Video Call
- Allow end customer to initiate video call
- Allow Agents to initiate Cobrowsing sessions
- Enable Followup Leads
- Allow agent to resume conversation on Whatsapp
- Allow agent to send message after 24 hr session expires
- Enable NPS
- Agent not available bot response
- Livechat Console Colour
- Auto Chat Disposal- Enabling this will automatically the chat as resolved when below conditions meet.
- When Customer Terminates Chat- When customers end the chat first.
- Time After Which Chat Should Dispose (in minutes)- LiveChat admin can select the time after which the chat will dispose once the customer terminates the chat.
- Session Inactivity- Chat gets resolved because of inactivity of agent or customer.

- Time After Which Chat Should Dispose (in minutes)
- Non working hour bot response
- Masking PII- PII data of customers will be masked.
- Enable LiveChat conversations through Email

- VOIP in LiveChat- An option to initiate the VOIP call in PIP and a new tab at the agent's and the customer's end.
- Agents will be able to Self Assign Chat.

This is visible unders LiveChat (Admin Side) > Settings > General Settings > Enable VOIP > PIP or NEW TAB

1. If the user selects VOIP in PIP the agent and customer can do a conversation over VOIP in PIP i.e in the same tab.
2. If the user selects VOIP in the New tab the agent and customer can do a conversation over VOIP in the new tab. **i.e** after initiating the VOIP call the agent and customer will be redirected to a new tab

Note : The download column option in VOIP History will only be available when the Option "New tab" is selected in Enable VOIP in admin settings.If the agent capacity is full for the LiveChat, now the agents can view & self-assign waiting chats. These waiting chats are sometimes getting dropped.

To enable Self Assignment for Agents :

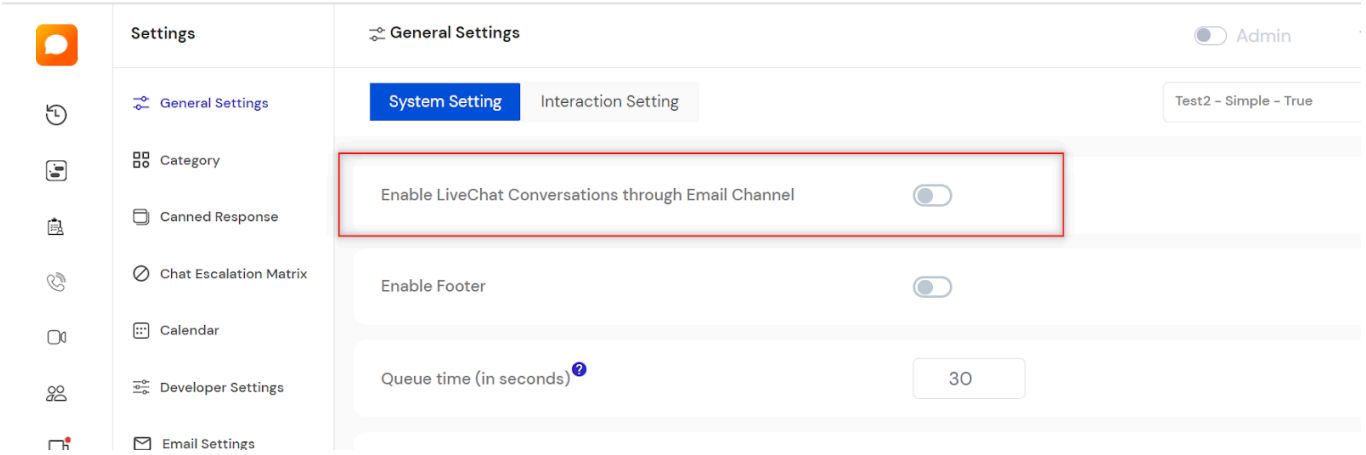
To enable this option : This is visible under Cogno Chatbot Cogno LiveChat Console (Admin Side) > Settings > General Settings > Enable self assign

Admin Side : To "Enable self-assign option of chats at agent's end" is provided. By default, the option will be off. On Enabling the toggle self-assign option of chats at the agent's end will be available.

Email Connectivity

This helps in communication between the agent and the end-user over the email channel.

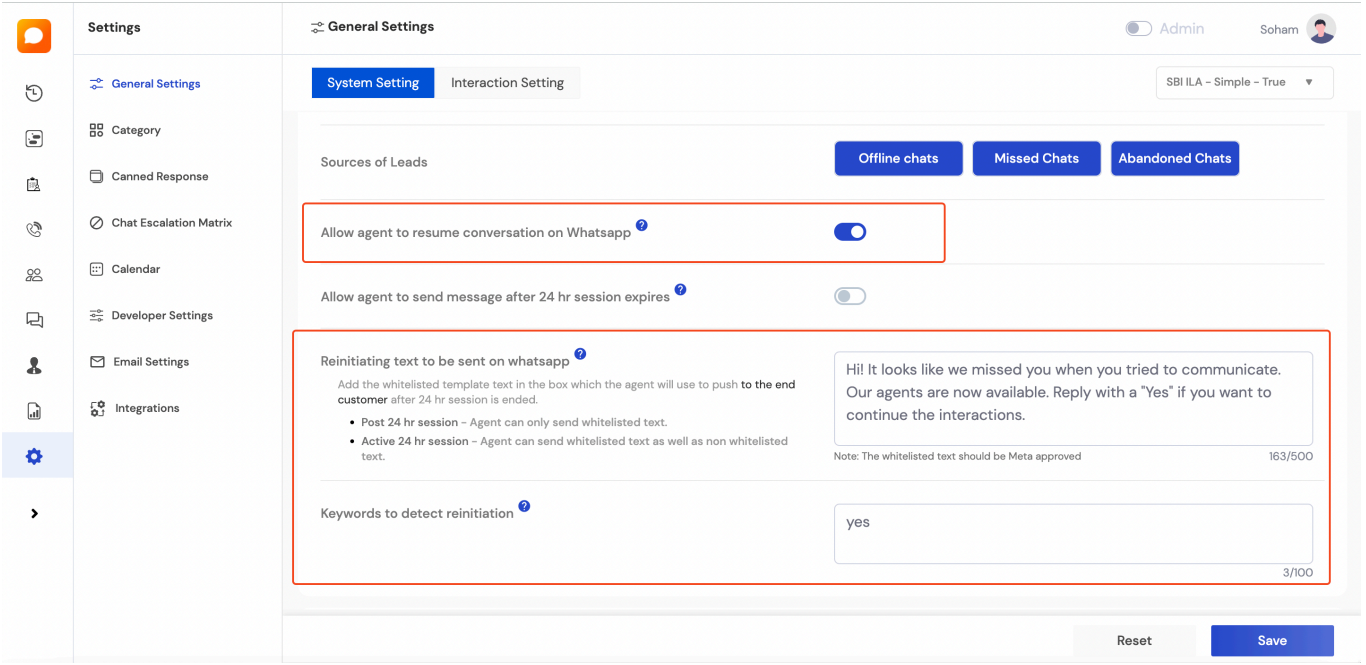
To configure: This is visible under LiveChat> Settings> General Settings> Enable LiveChat Conversations through Email Channel toggle



Whenever it is enabled and an incoming email is configured, any user/customer that sends an email to that email address gets assigned to an agent as in the existing system.

Allow agent to resume conversation on Whatsapp

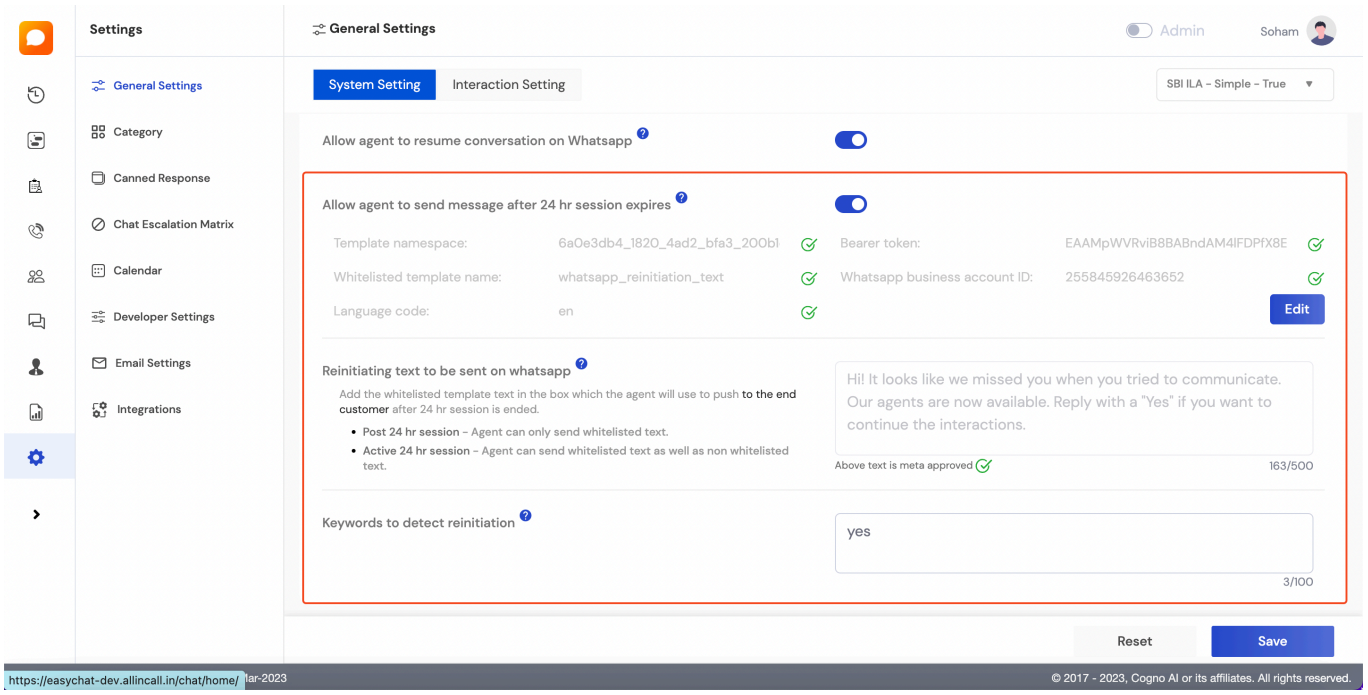
This allows agents to reinitiate a conversation with the customer over whatsapp within the 24 hours connecting window.This is visible under Admin Settings > General Settings > System Settings > Allow agent to resume conversation on Whatsapp.



Once enabled admin can specify the whitelisted/non-whitelisted text to be sent by the agent and also specify the keyword that the customer will use if he wants the session to get reinitiated as well.

Allow agent to send message after 24 hr session expires

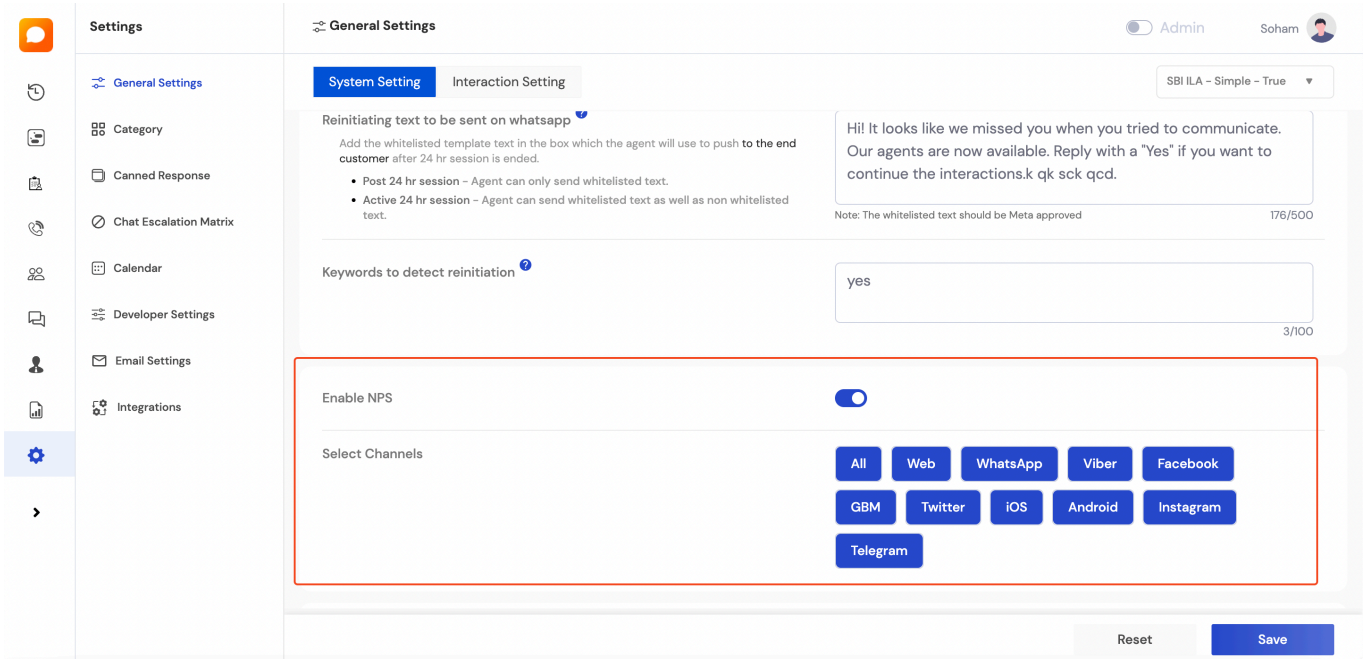
This allows admin and agents to reinitiate a conversation with the customer over whatsapp after the 24 hours session window expiresThis is visible under Admin Settings > General Settings > System Settings > Allow agent to resume conversation on Whatsapp > Allow agent to send message after 24 hr session expires



Once enabled admin can add whitelisted template text from WABA ID by adding WABA template credentials and verifying the same via Meta's API. Admin cannot edit the reinitiating text in this case since the template message is approved by Meta. However admin can edit the reinitiating keyword.

Enable NPS

This is visible under Admin Settings > General Settings > System Settings > Enable NPS



Admin can enable NPS for all channels or keep it enabled in specific channels and turn off the rest.

12.1.2.7.1. General Settings

General Settings

In this tab, the setting has been made bot specific so the Admin can decide the following functionality by selecting the bot:

- Whether or not to assign agents based on their set category
- Enable/Disable Footer
- Maximum number of customers than an agent can talk to at a time
- Queue time(in seconds) - maximum time the customer will wait in the queue.
- Enable Supervisors to Create Groups
- Enable Customer Details Editing
- Enable Raise a ticket functionality for the Agent
- Enable self-assign option of chats at agent's end
- Enable Voice/Video Call
- Allow end customer to initiate video call
- Allow Agents to initiate Cobrowsing sessions
- Enable Followup Leads
- Allow agent to resume conversation on Whatsapp
- Allow agent to send message after 24 hr session expires
- Enable NPS
- Agent not available bot response
- Livechat Console Colour
- Auto Chat Disposal- Enabling this will automatically the chat as resolved when below conditions meet.
- When Customer Terminates Chat- When customers end the chat first.
- Time After Which Chat Should Dispose (in minutes)- LiveChat admin can select the time after which the chat will dispose once the customer terminates the chat.
- Session Inactivity- Chat gets resolved because of inactivity of agent or customer.

- Time After Which Chat Should Dispose (in minutes)
- Non working hour bot response
- Masking PII- PII data of customers will be masked.
- Enable LiveChat conversations through Email

- VOIP in LiveChat- An option to initiate the VOIP call in PIP and a new tab at the agent's and the customer's end.
- Agents will be able to Self Assign Chat.

This is visible unders LiveChat (Admin Side) > Settings > General Settings > Enable VOIP > PIP or NEW TAB

1. If the user selects VOIP in PIP the agent and customer can do a conversation over VOIP in PIP i.e in the same tab.
2. If the user selects VOIP in the New tab the agent and customer can do a conversation over VOIP in the new tab. **i.e** after initiating the VOIP call the agent and customer will be redirected to a new tab

Note : The download column option in VOIP History will only be available when the Option "New tab" is selected in Enable VOIP in admin settings.If the agent capacity is full for the LiveChat, now the agents can view & self-assign waiting chats. These waiting chats are sometimes getting dropped.

To enable Self Assignment for Agents :

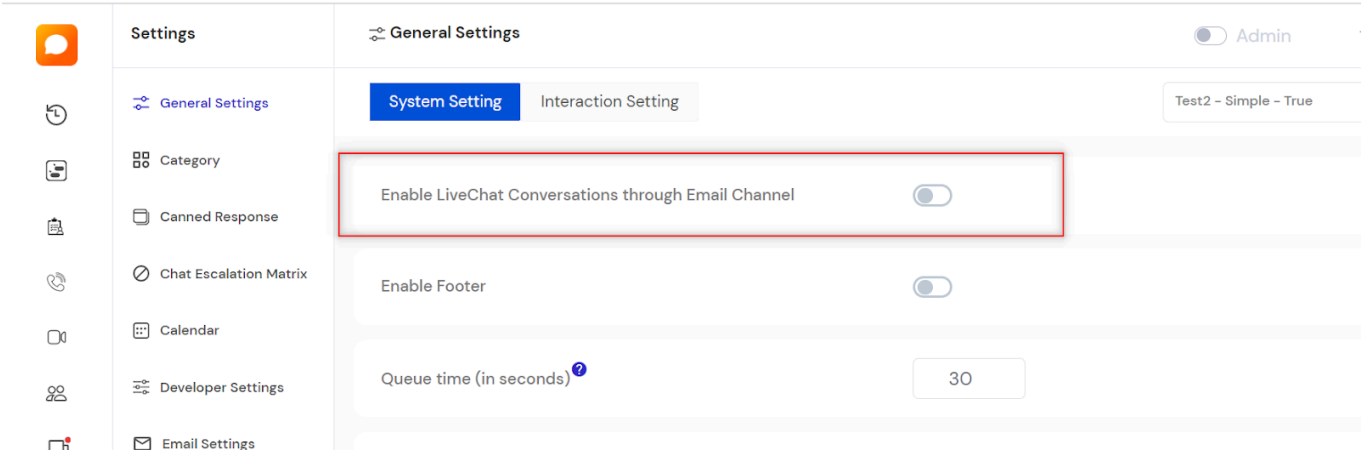
To enable this option : This is visible under Cogno Chatbot Cogno LiveChat Console (Admin Side) > Settings > General Settings > Enable self assign

Admin Side : To "Enable self-assign option of chats at agent's end" is provided. By default, the option will be off. On Enabling the toggle self-assign option of chats at the agent's end will be available.

Email Connectivity

This helps in communication between the agent and the end-user over the email channel.

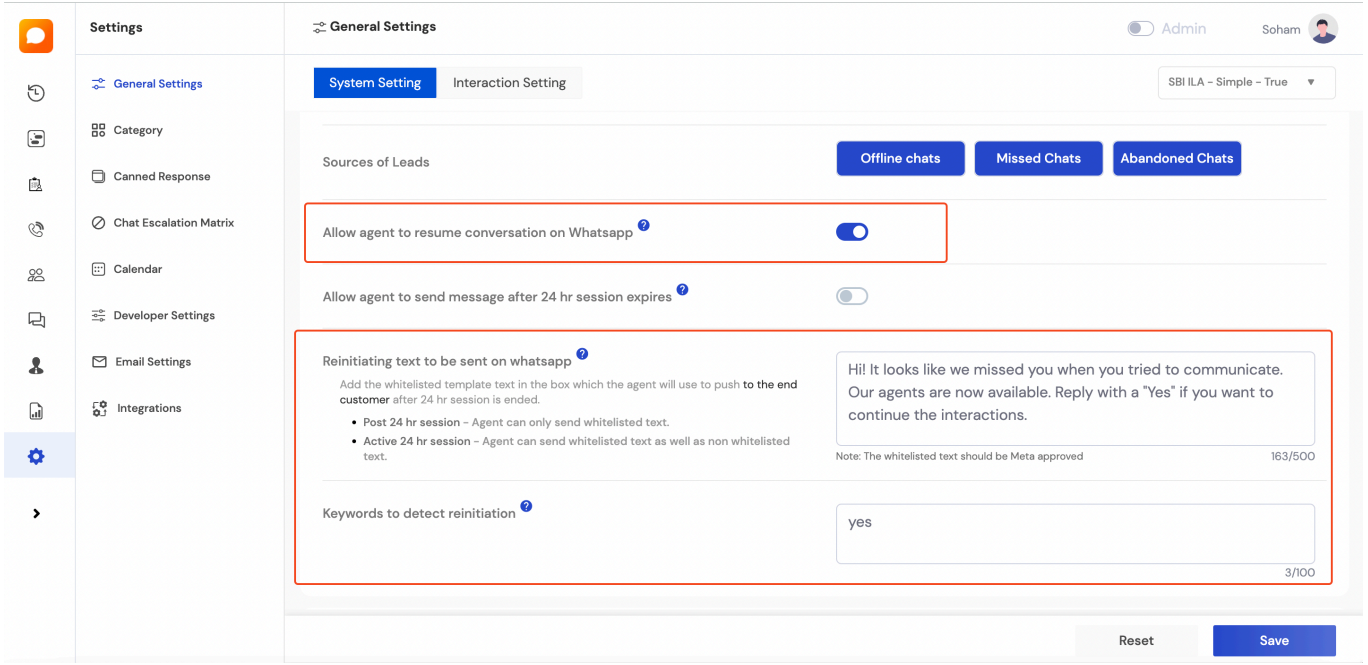
To configure: This is visible under LiveChat> Settings> General Settings> Enable LiveChat Conversations through Email Channel toggle



Whenever it is enabled and an incoming email is configured, any user/customer that sends an email to that email address gets assigned to an agent as in the existing system.

Allow agent to resume conversation on Whatsapp

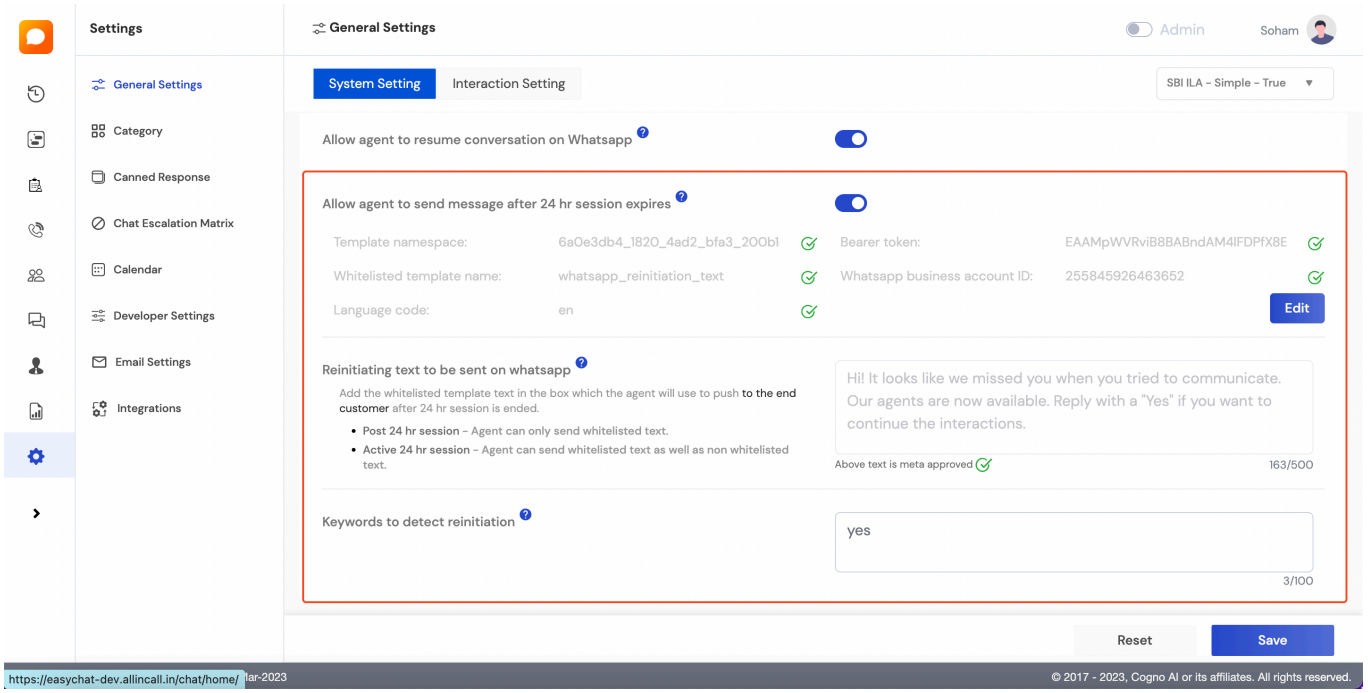
This allows agents to reinitiate a conversation with the customer over whatsapp within the 24 hours connecting window.This is visible under Admin Settings > General Settings > System Settings > Allow agent to resume conversation on Whatsapp.



Once enabled admin can specify the whitelisted/non-whitelisted text to be sent by the agent and also specify the keyword that the customer will use if he wants the session to get reinitiated as well.

Allow agent to send message after 24 hr session expires

This allows admin and agents to reinitiate a conversation with the customer over whatsapp after the 24 hours session window expiresThis is visible under Admin Settings > General Settings > System Settings > Allow agent to resume conversation on Whatsapp > Allow agent to send message after 24 hr session expires



Once enabled admin can add whitelisted template text from WABA ID by adding WABA template credentials and verifying the same via Meta's API. Admin cannot edit the reinitiating text in this case since the template message is approved by Meta. However admin can edit the reinitiating keyword.

Enable NPS

This is visible under Admin Settings > General Settings > System Settings > Enable NPS



Admin can enable NPS for all channels or keep it enabled in specific channels and turn off the rest.

12.1.2.7.1.1. Interaction Settings

Interaction Settings

This consists of all the settings that affect the console and end customer-facing sections.

Settings	Input Type
Assign Chats to Agents based On Their Category	Toggle Button
Enable Chat Escalation Matrix for Customers	Toggle Button
Max Number of Customers with whom an agent can chat at a time	Numeric Input
Max Number of Agents that can be invited to a chat	Drop Down
Enable Customer Detail Editing	Toggle Button
Send transcript to the customer	Allows agents to send transcripts to the customer Also, it enables customers to request transcripts on the bot.
Enable Raise a ticket functionality for the Agent	Toggle Button
Enable the self-assign option of chats at the agent end	Toggle Button
Enable Video/Voice Call	Drop Down
Allow Agents To Initiate Co-browsing Sessions	Toggle Button
Pending Time for Accept/Reject while an agent invites another agent in chat	Numeric Input

12.1.2.7.1.2. System Settings

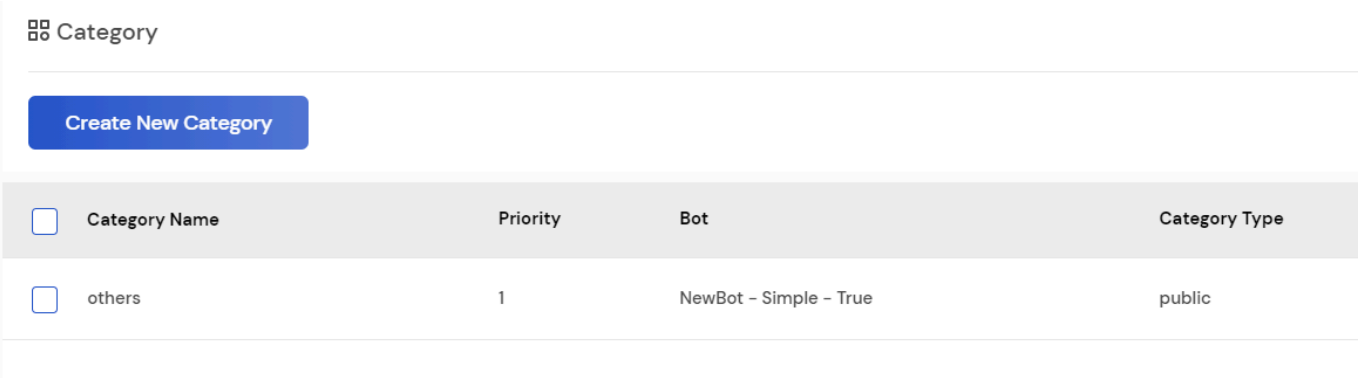
System Settings

This consists of all the options that affect the internal system console.

Settings	Input Type
Enable LiveChat Conversations through Email Channel	Toggle Button
Enable Footer	Toggle Button
Queue Time	Numeric Input
Enable Supervisor To Create Groups	Toggle Button
Enable Follow Up Leads	Toggle Button
Allow agent to resume conversation on Whatsapp (Link)	Toggle Button
Enable NPS	Toggle Button
Agent Not Available Bot Response	Input Text Box
Auto Chat Disposal	Toggle Button
Enable virtual translation for the agents	Toggle Button
Console Colour	Colour Picker
Non-Working Hours Bot Response	Text box
Masking PII	Toggle Button

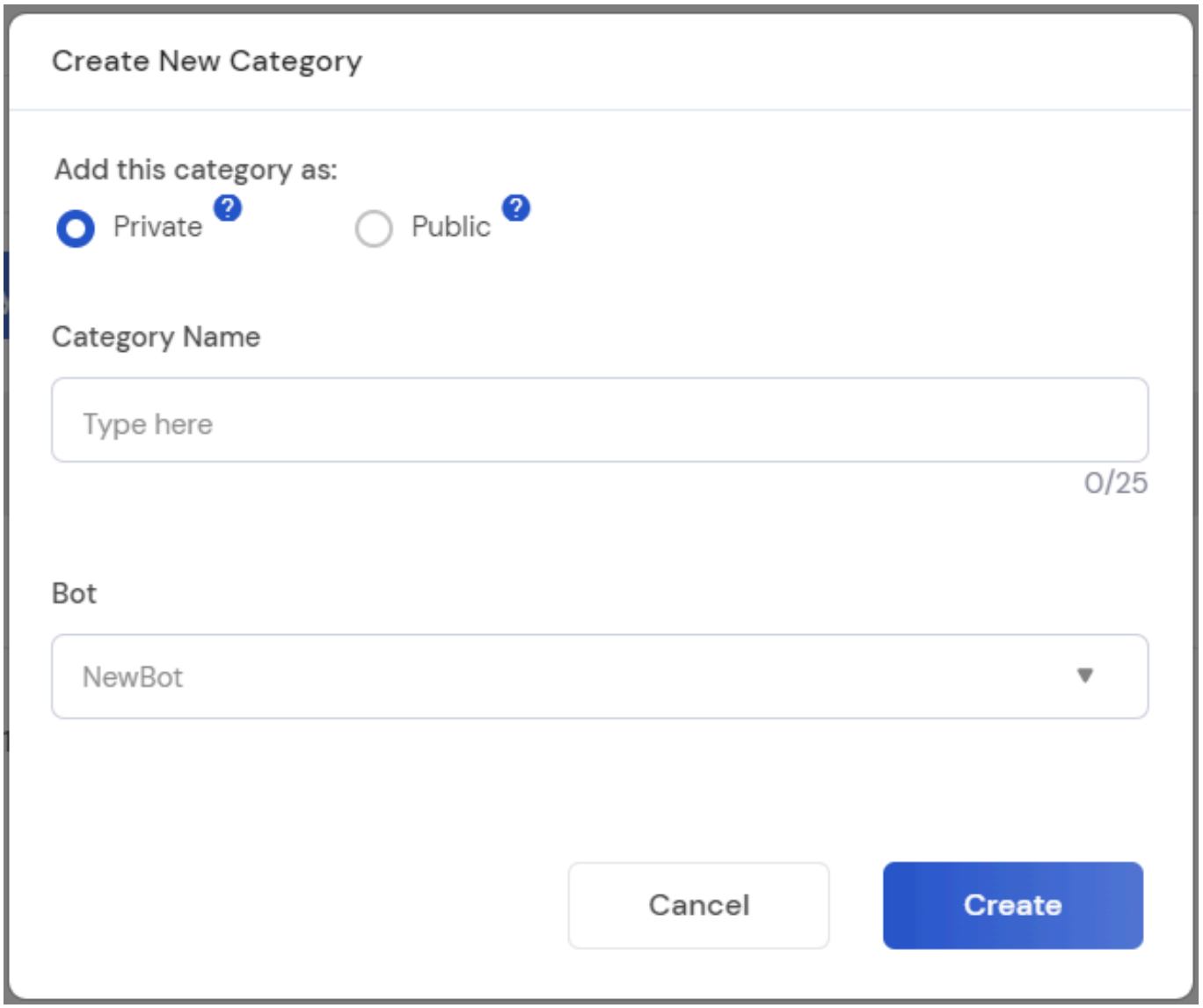
12.1.2.7.2. Category

In this tab, the Admin can create or delete categories.The Admin can also assign a priority order for different categories by selecting specific bot and can edit this order anytime.



Private Category:

Any category selected as a private category by admin while creating a new category, then this category will only be visible to agents while disposing the chat.



Public CategoryAny category selected as a public category by admin while creating a new category, then this category will be visible to customers while raising chat and will be visible as an option to the agents while disposing the chat.

Create New Category

Add this category as:

Private Public

Category Name

Type here

0/25

Priority

1

Bot

NewBot

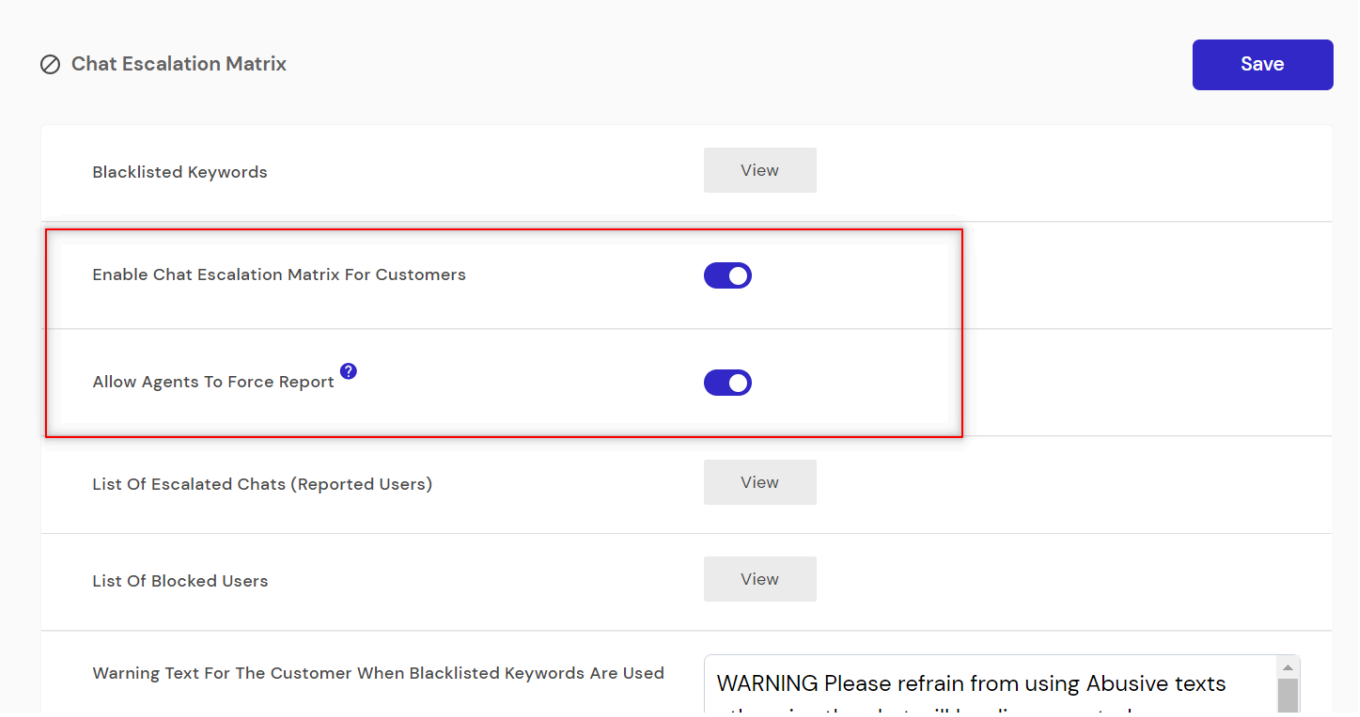
Cancel Create

12.1.2.7.3. Canned Responses

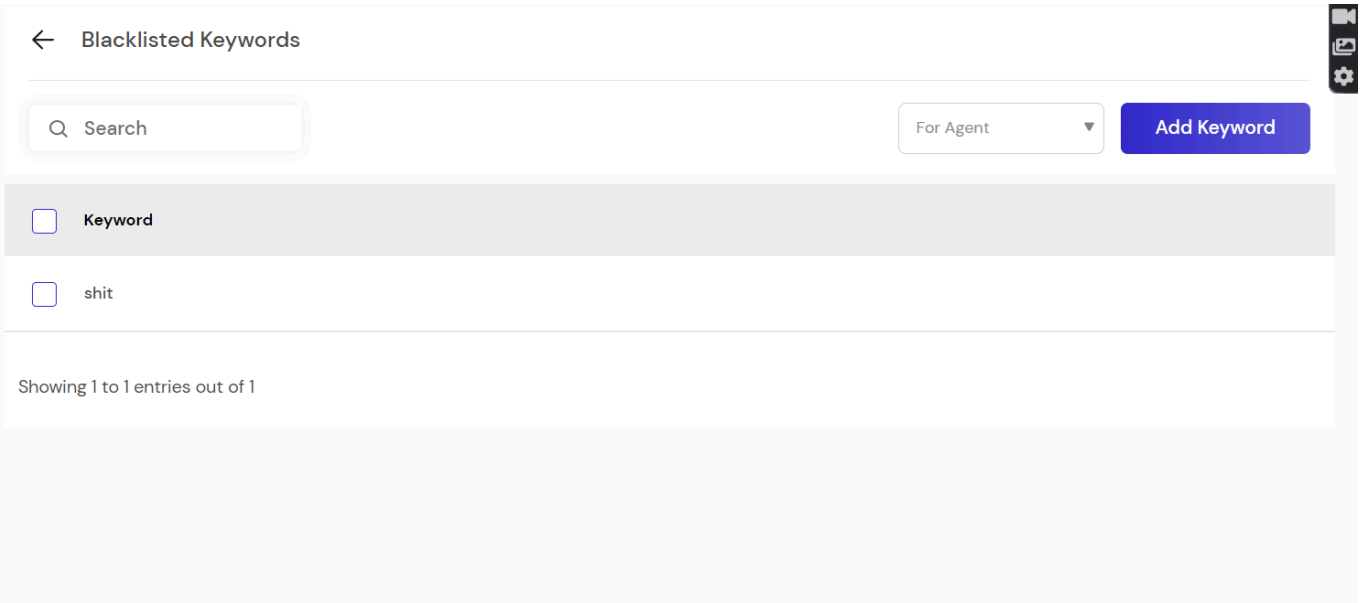
In this tab, the Admins can create or delete Canned Responses. The Canned Responses created by Admins will be public and available to all the agents. An option of upload excel is also available for the admin to upload excel which contains the keyword and the respective canned response for it.

12.1.2.7.4. Chat Escalation Matrix

This tab has the toggle that enables the chat escalation matrix feature. Once switched on it allows the agents to warn and report users who are misbehaving.To configure chat escalation matrix : LiveChat>Settings>Chat Escalation Matrix> Enable Chat Escalation Matrix For Customers Toggle> Allow Agents to Force Report



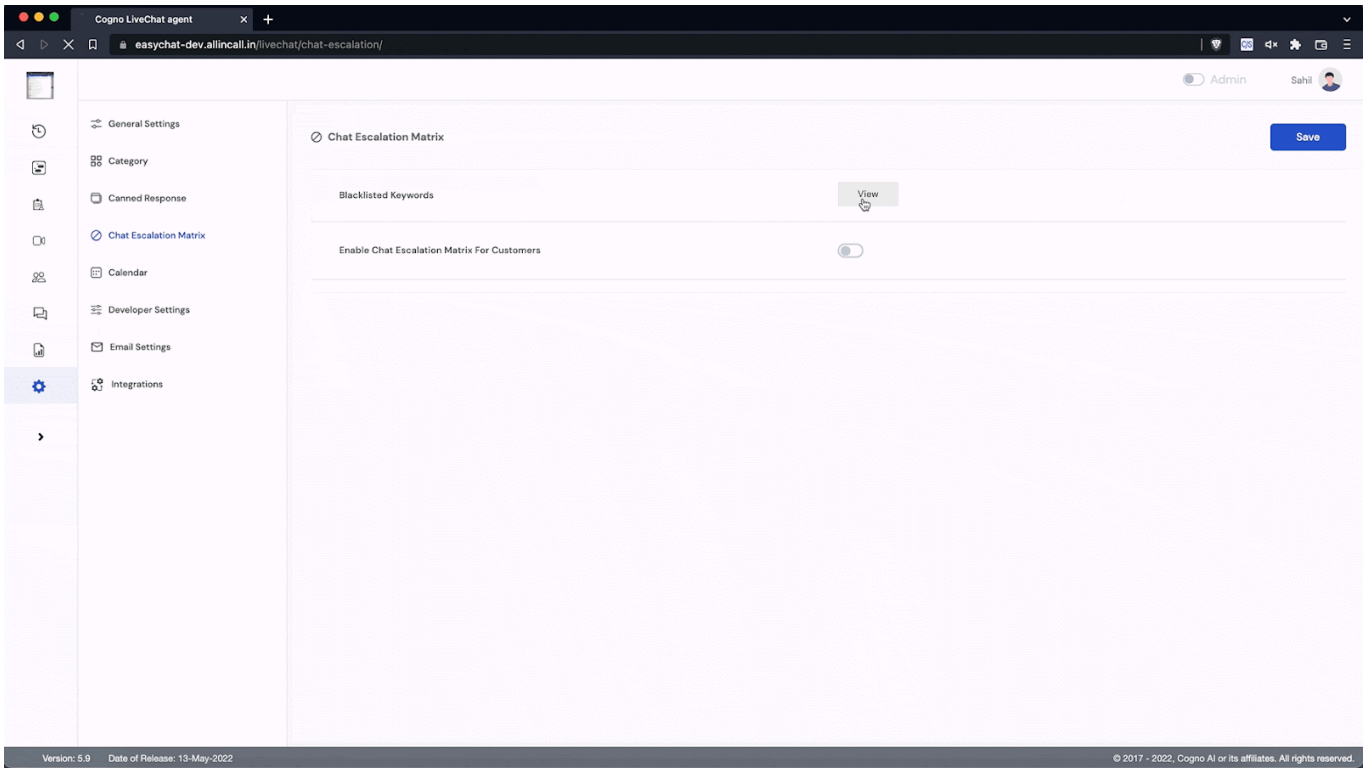
This tab includes keywords such as, but not limited to, cuss words, offensive terms which the Admin can choose to block so other agents and customers won't be able to use those in their conversations.



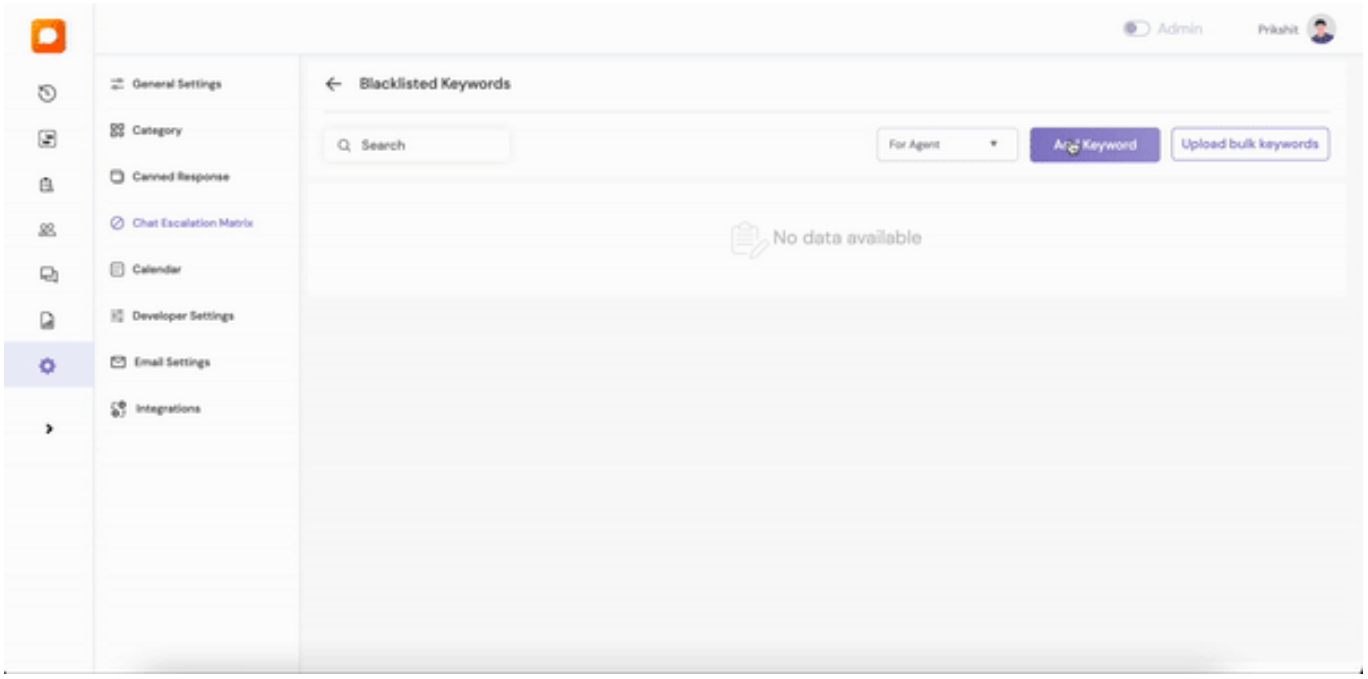
-In case the customer uses any of the blacklisted keywords then they are warned about it. The agent also has the option to report it.-Once a chat has been reported by the agent, the admin can go through the list of reported users and also view their chat history. -If he feels that the user has behaved inappropriately he may block the user for some time, if not then he can ignore the reported chat. -The admin can also see the total number of customers reported in the analytics section of the dashboard.

Add multiple blacklisted keywords at once

Addition of blacklisted keywords used to take a lot of time since earlier versions only allowed addition of 1 keyword at a time. This new feature will let a console user add multiple keywords at a time by just typing and pressing enter.To configure : This is visible under : LiveChat > Settings > Chat Escalation Matrix > Blacklisted Keywords > View > Add Keyword



Once a console user is at the View page of ‘Blacklisted Keyword’, they can add keywords by clicking on the ‘Add Keyword’ button. This opens up a dialogue box, where the user can type in any keyword and press enter to store them in a queue. This can be repeated multiple times to add multiple words in the queue. Once added, these words can be tagged as blacklisted by clicking on the ‘Save’ button.



The words added in a queue can be removed by clicking on the ‘x’ button. If a few words are added in a queue and the dialogue box is then canceled, these words would still be there in the queue when this dialogue box is reopened.

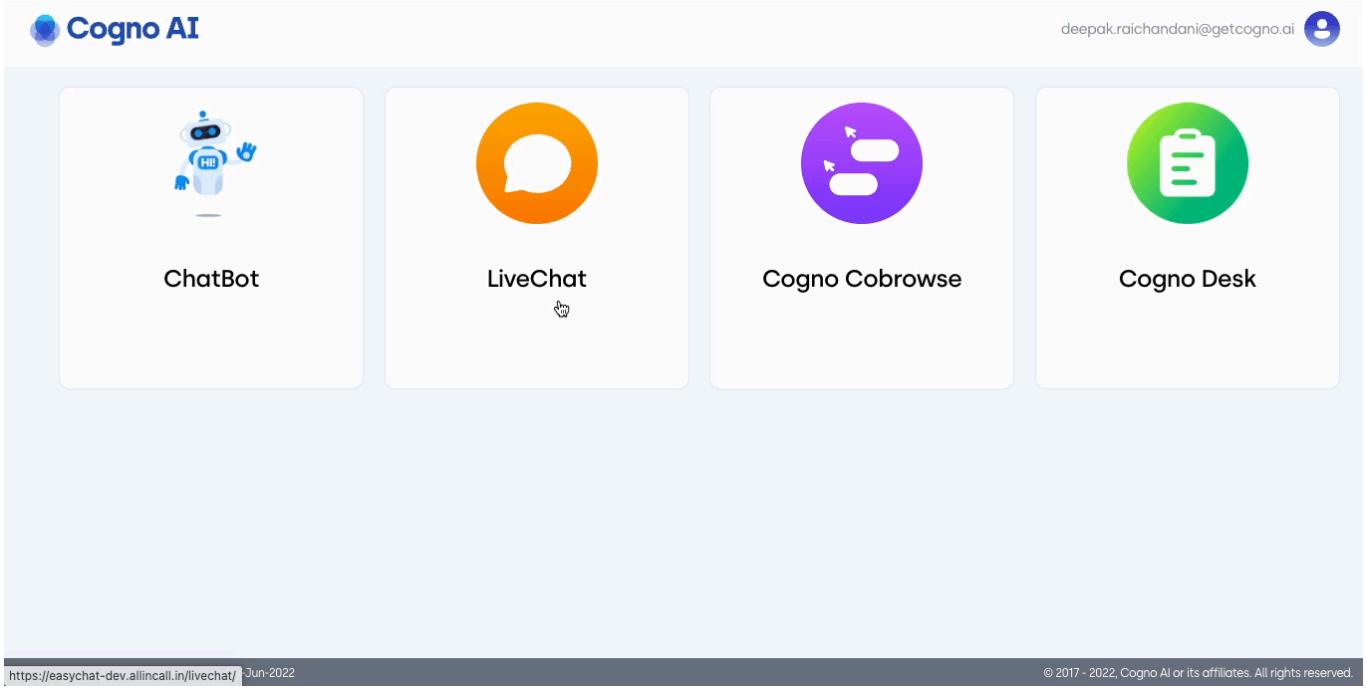
Please note :

1. Keywords for both Agents and End customers cannot be uploaded using 1 excel sheet.

12.1.2.7.5. Calendar

A graphical user interface to support the addition, viewing and editing of holidays and working days in the current LiveChat Console.**To configure :** This is visible under : LiveChat > Settings > Calendar

Now the holidays and the working days can be viewed at a single screen and not in a list view. The addition of holidays and work timings will be done using the same buttons on the right hand section of the calendar.Hovering over any date showcases the edit icon for that date, clicking on which will open the edit window for that particular dayRefer the below shown demo for better understanding

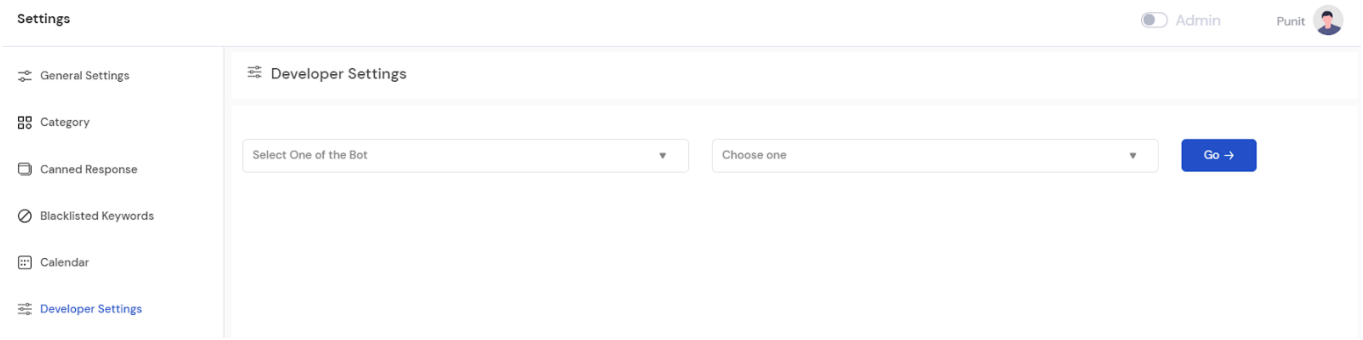


Please note :

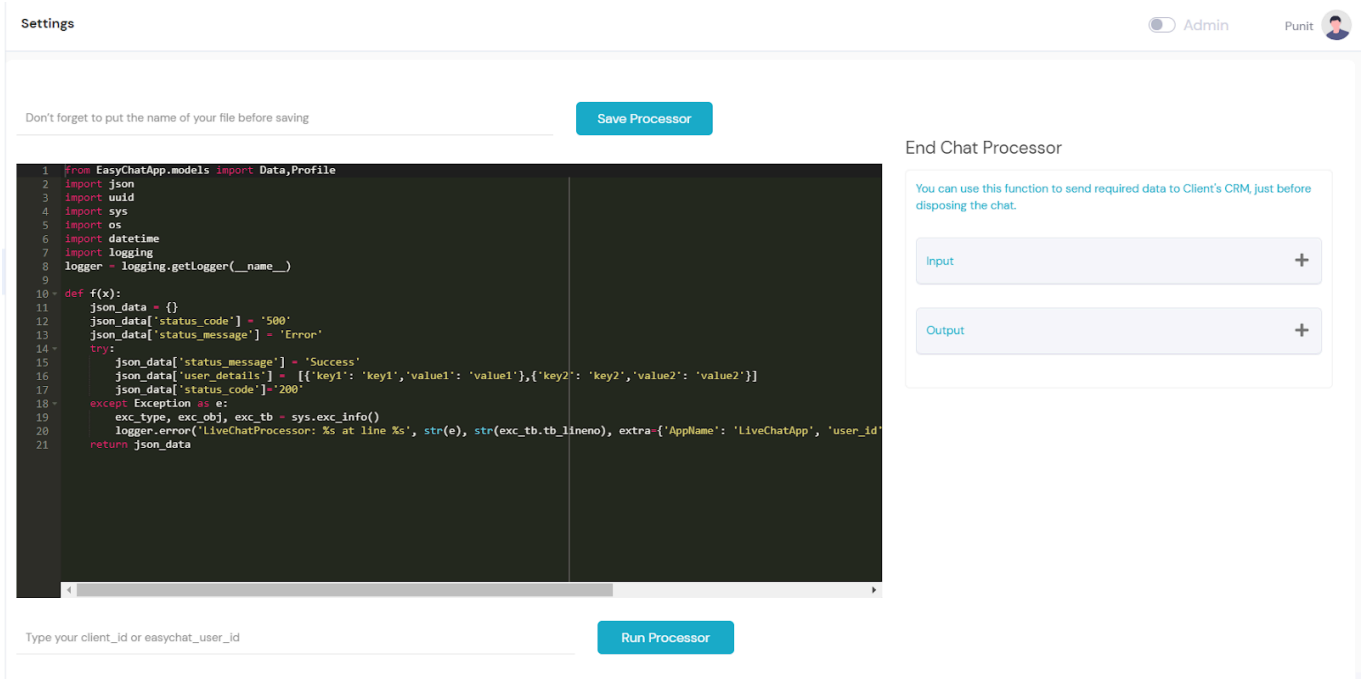
1. No search button to search for any specific date/info directly.
2. By default each month will have all Sundays as holidays and default work timings would be 00:00 to 23:59.

12.1.2.7.6. Developer Settings

Developers can integrate the APIs provided by the client in LiveChat Console (admin) by going to Settings-> Developer settings.



1. **To send data to client's CRM while disposing chat-** While disposing of any chat, if there is any custom form that the client has asked to develop and they also want to push these details to their CRM.




```
from EasyChatApp.models import Data,Profile
import json
import uuid
import sys
import os
import datetime
import logging
logger = logging.getLogger(__name__)

def f(x):
    json_data = {}
    json_data['status_code'] = '500'
    json_data['status_message'] = 'Error'
    try:
        json_data['status_message'] = 'Success'
        json_data['user_details'] =  [{'key1': 'key1','value1': 'value1'},{'key2': 'key2','value2': 'value2'}]
        json_data['status_code']='200'
    except Exception as e:
        exc_type, exc_obj, exc_tb = sys.exc_info()
        logger.error('LiveChatProcessor: %s at line %s', str(e), str(exc_tb.tb_lineno), extra={'AppName': 'LiveChatApp', 'user_id'
    return json_data
```

1. **To display Customer Details**- Client asks to display the details that are provided by them through their API in the customer details section when chat hits the agent.

Email

rtdfgy@TYGuh.com

Phone

9876543210

Chat initiated at

10:30 AM

Chat initiated on

14-Apr-2021

Category

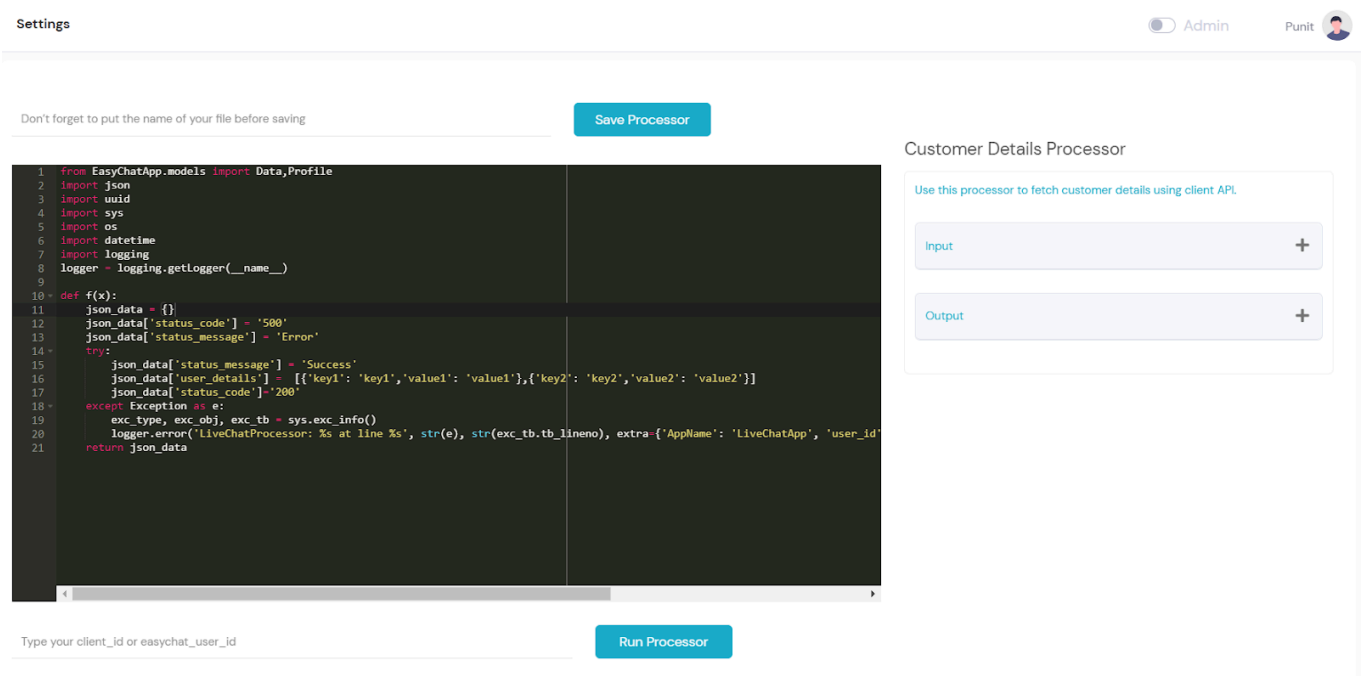
others

Currently assigned agent

Tommy Sharma(Tommy@gmail.com)

Previously assigned agent

-




```
from EasyChatApp.models import Data,Profile
import json
import uuid
import sys
import os
import datetime
import logging
logger = logging.getLogger(__name__)

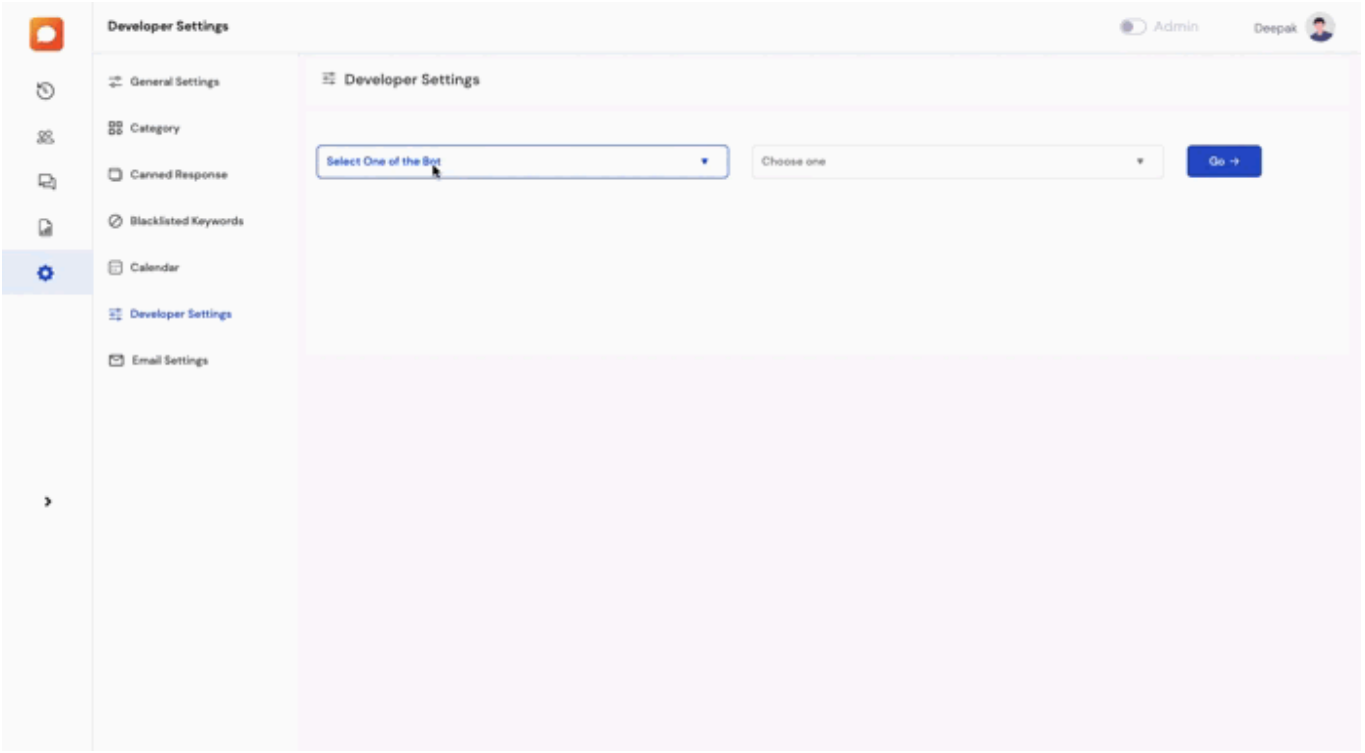
def f(x):
    json_data = {}
    json_data['status_code'] = '500'
    json_data['status_message'] = 'Error'
    try:
        json_data['status_message'] = 'Success'
        json_data['user_details'] = [{'key1': 'key1','value1': 'value1'},{'key2': 'key2','value2': 'value2'}]
        json_data['status_code']='200'
    except Exception as e:
        exc_type, exc_obj, exc_tb = sys.exc_info()
        logger.error('LiveChatProcessor: %s at line %s', str(e), str(exc_tb.tb_lineno), extra={'AppName': 'LiveChatApp', 'user_id'
    return json_data
```

1. To Customize Chat Dispose Form

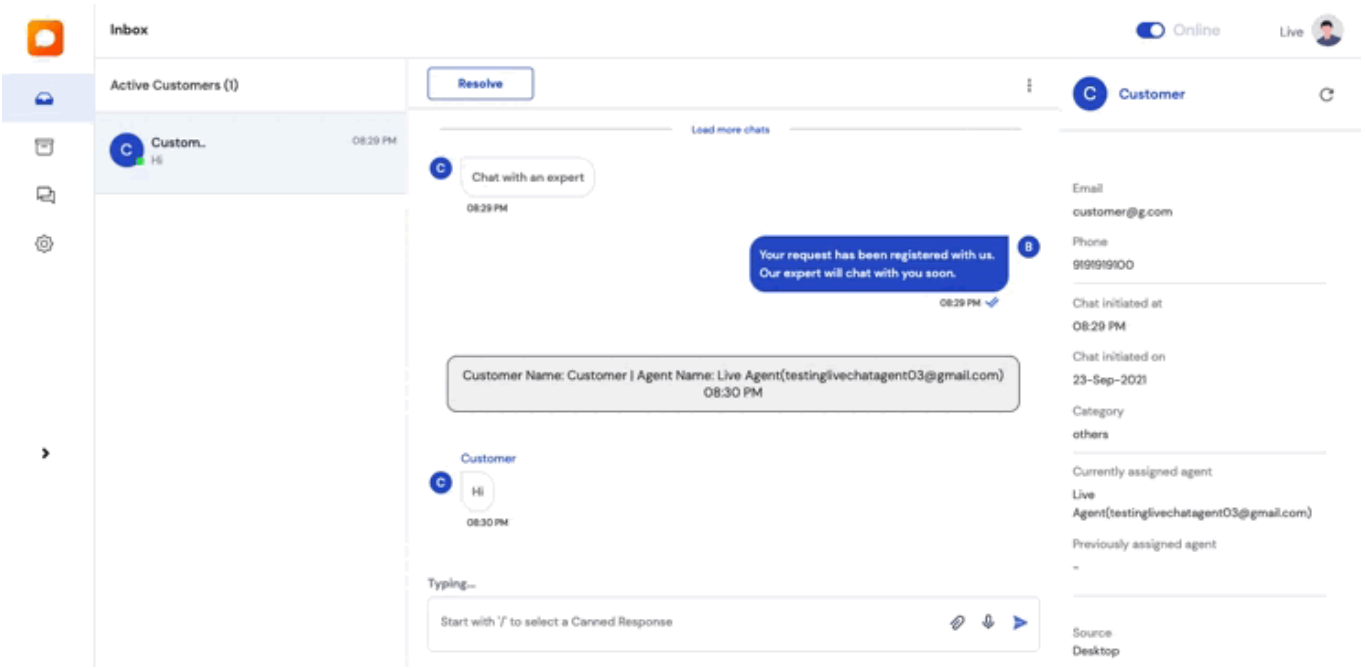
LiveChat Admin will be able to customize the chat dispose form by selecting multiple types of input fields. Also the form can be viewed from the chat history in 'Taggings'.

Refer the below shown demos for better understanding

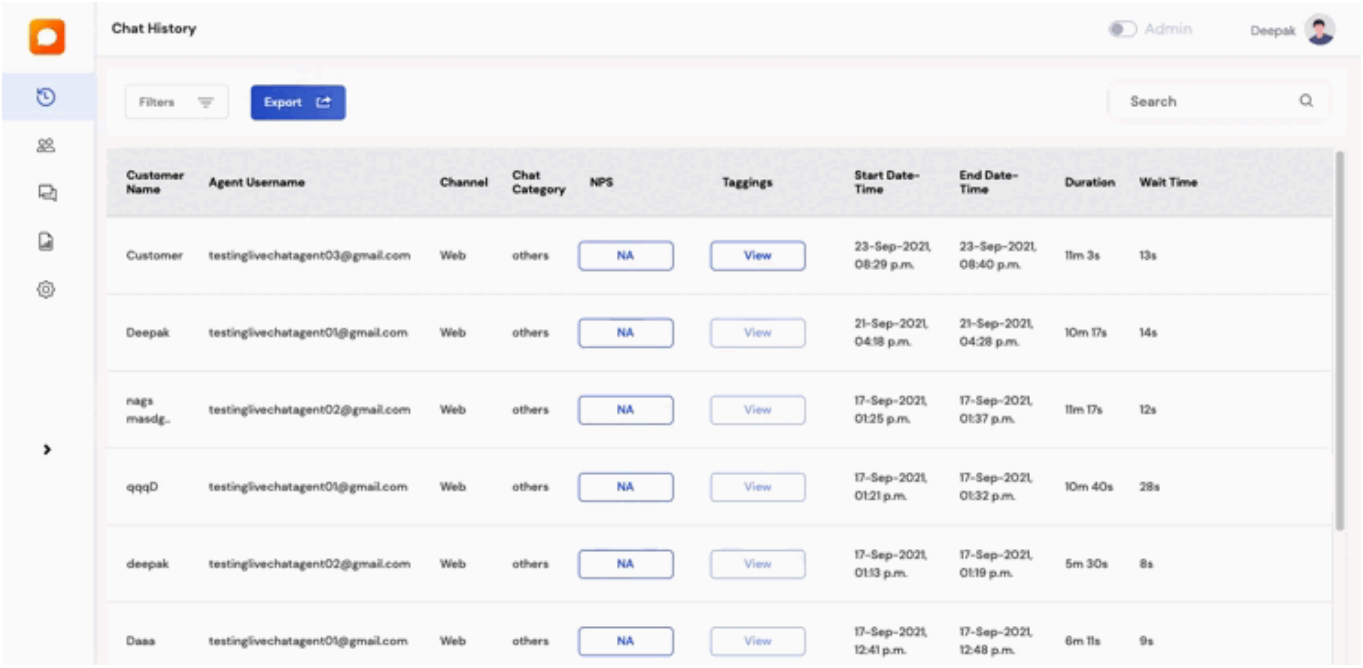
Admin Side This is visible under Settings > Developer Setting > Select your bot > Choose “Customise chat dispose form” Enable the toggle to customise the form. Admin will be able to add multiple fields in the form like text box, radio button, drop down, checkbox and date. Any of the fields created in the form can be marked as optional. Preview of the form will be available on the same page as shown in the below image.



Agent Side This is visible under Click on Resolve > Fill the form > Click on Yes



Admin Chat History This is visible under Chat History > Taggings > Click on ‘View’



WhatsApp Webhook Configuration (LiveChat)

LiveChatThis setting allows the users to integrate WhatsApp webhooks (Business Solution Provider (BSP) specific) with bots linked with user accounts (As well as for user accounts having shared bots) directly from "Developer settings" inside **LiveChat Admin.**

This is visible under LiveChat (Admin Console) > Settings > Developer Settings > Select Bot > Select Whatsapp Vendor Selection > Go

On selecting **Whatsapp Webhook Integration** and clicking on go, the user can select a whatsapp BSP from the "Select WhatsApp BSP" dropdown. Once a BSP is selected for the first time, the default code of that BSP would get displayed in a code window below the dropdown.

Please Note :

1. If a BSP is already configured with a particular bot that selection would automatically get displayed in the BSP dropdown. Trying to change that BSP would show aa alert as displayed below.

1. Selecting a different BSP will overwrite the existing code.

1. The "Save Configuration" and "Reset" button will only stay activated if an already configured code has been opened or some changes are made in the default code.

1. Clicking on "Save Configuration" will save the last code changes present in the code window. and clicking on "Reset" would ask for a confirmation (as displayed below) and clicking on "Confirm" would reset all the changes done and change the code to the default BSP code.

1. If a user shares a bot with a different id then both users can collaboratively work on the webhook configuration code from their respective ids. (warning message stating "**Somebody is already working on this code"** will be displayed to User 2).

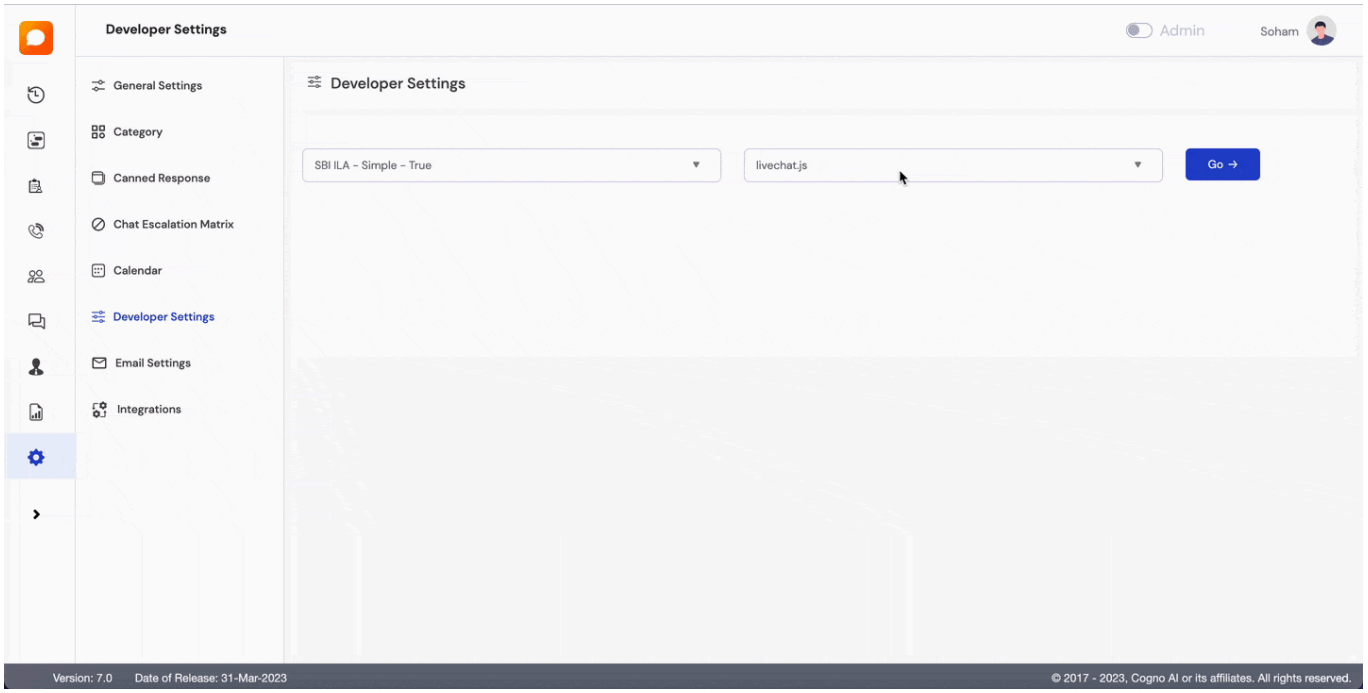
Please note: BSPs available in the dropdown include RML, Ameyo, Exotel(New)

Click here Refer the demo for better understanding

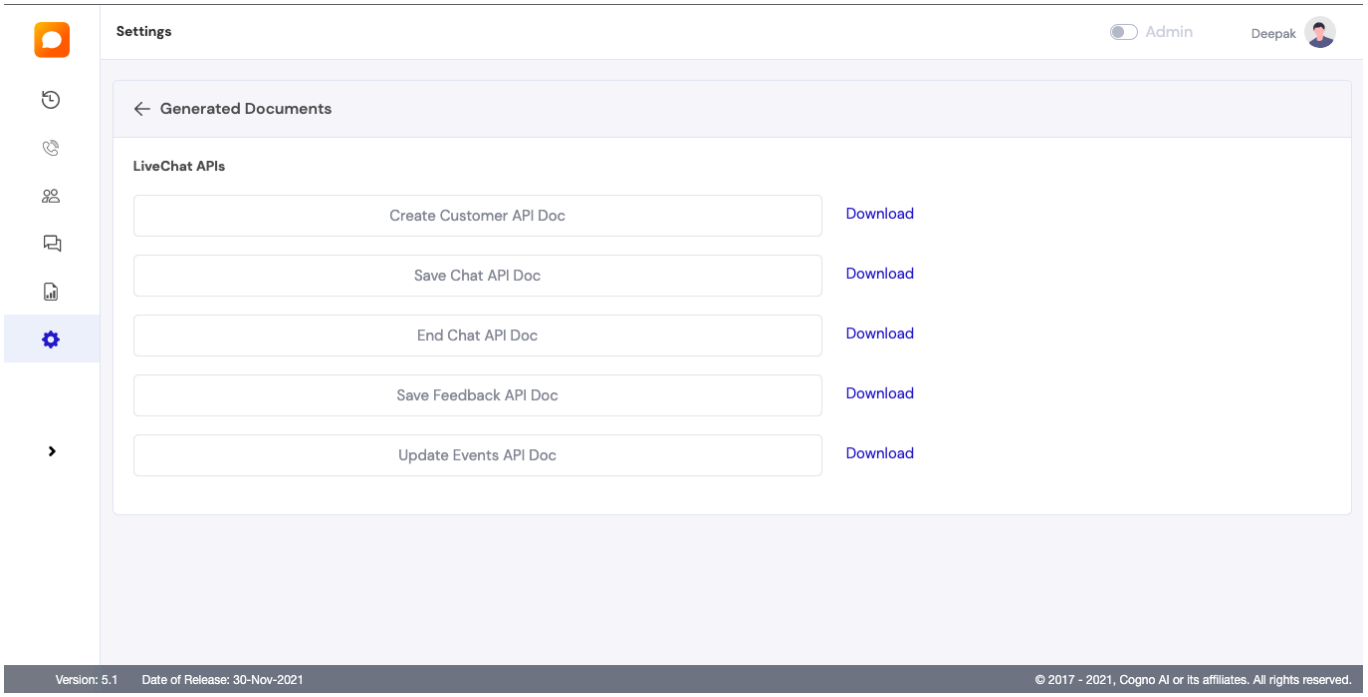
Developer Option Improvement

This feature enables the Operations team to make modifications to the livechat.js and livechat_fusion.js files as required, directly from livechat developer options on the frontend.

Admin can configure this from settings > Developer Settings > Select Bot > Select livechat.js / livechat_fusion.jsRefer to the GIF below:



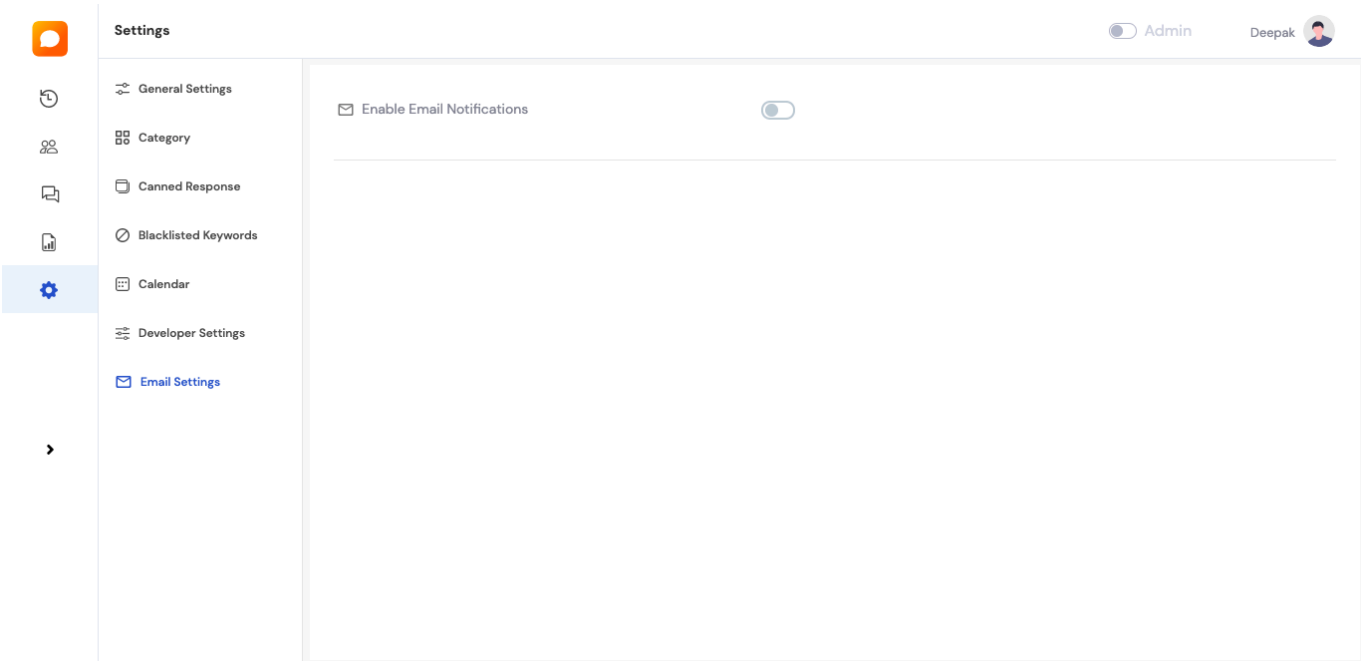
API Based Solution Push and pull API-based solution for updates by webhook and client push calls (API based solutions for our LiveChat product)



12.1.2.7.7. Email Settings

Email Configuration now includes more functionalities than before, along with the ability to customize and create profiles, as well as send test emails, all at the console end itself.

This is visible under Settings(Admin Side) > Email Settings > Enable Email Notification > Click on Add Profile(+) / Edit the existing one



Profile will have following parameters

Trigger settings :

Profile name can be edited. Email Frequency can be set to Daily, 7 days, 15 days, 30 days, 60 days, 90 days. Add email address for triggering the mail. Email default subject is “Cogno Ai-LiveChat Report Mailer”.Note : Even if the email id is not added the profile can be customised

and saved. Only the email will not be triggered. Also multiple values can be selected in case of Email Frequency and multiple Email Addresses can be added.

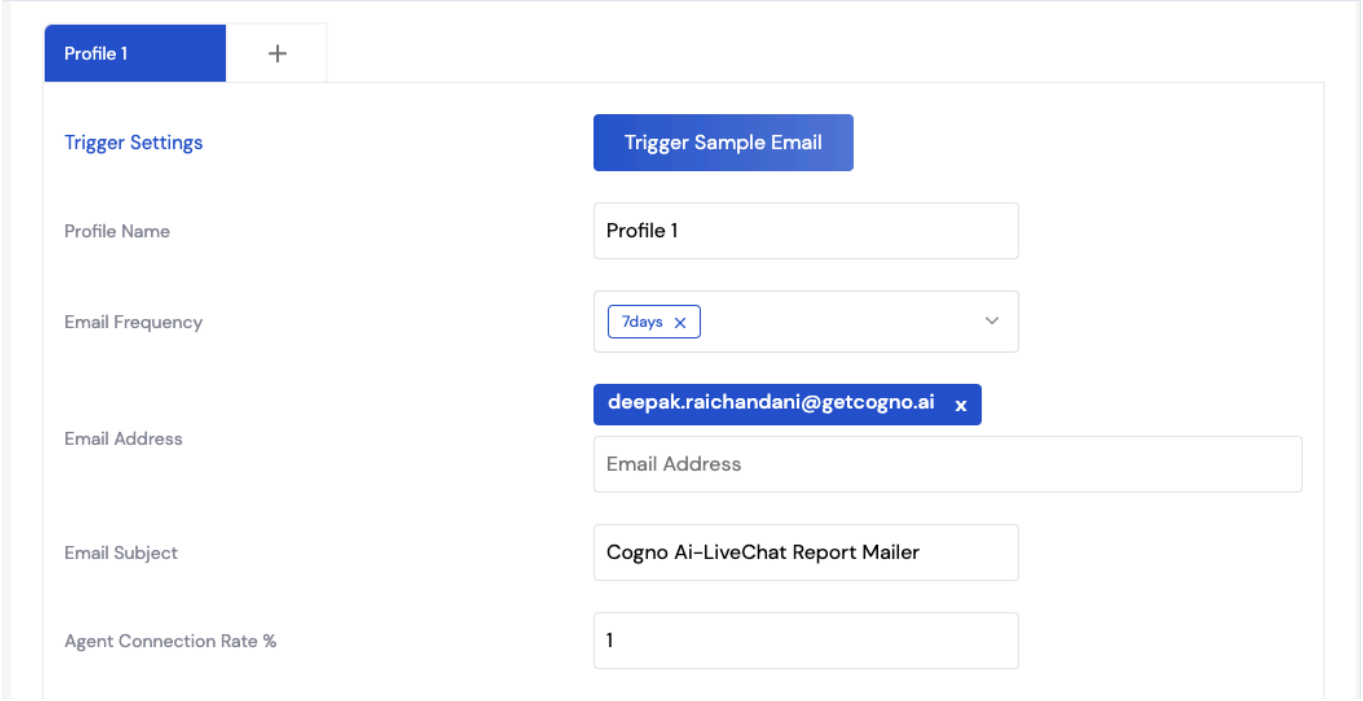


Table Parameters :

Table parameters can be enabled or disabled. This consists of the following Reporting Parameters : That is the count variation and channels enabled.

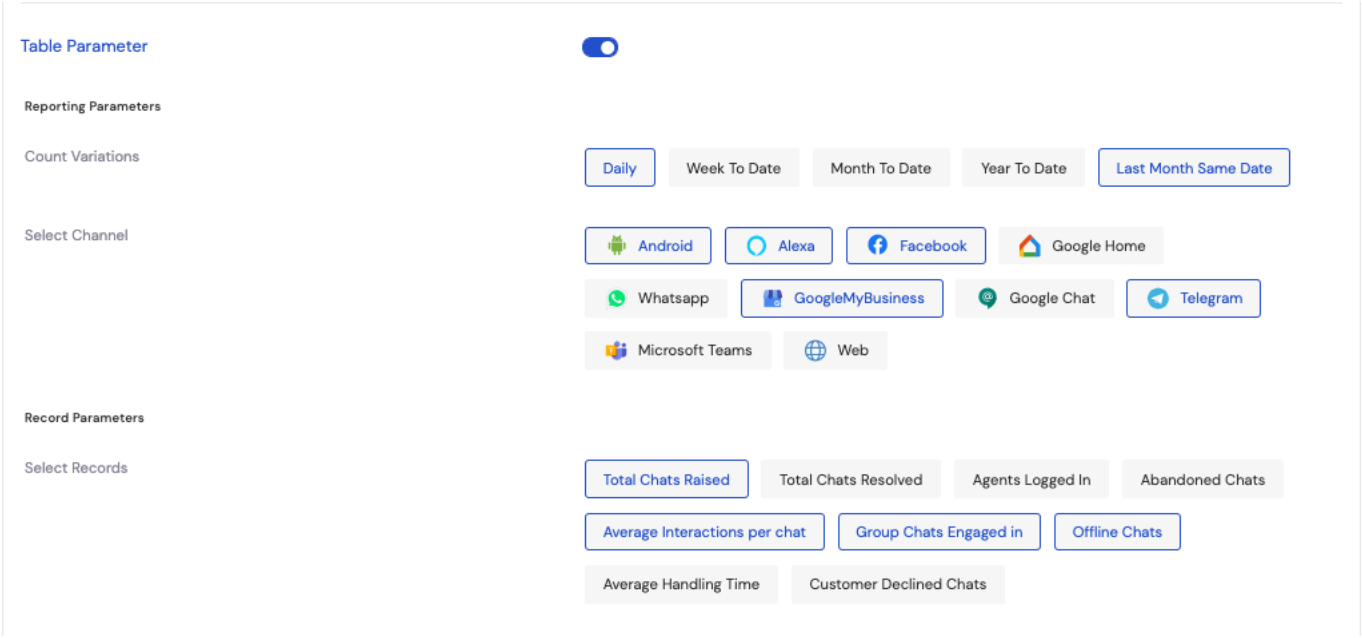
- Daily - Count on the day of triggering the mail
- WTD - Total Count from the start of the week/go live date, to the day of the triggering
- MTD - Total Count from the start of the month/go live date, to the day of the triggering
- YTD - Total Count from the start of the year/go live date, to the day of the triggering.

Channels : All the Channels that are enabled for the bot will be shown.

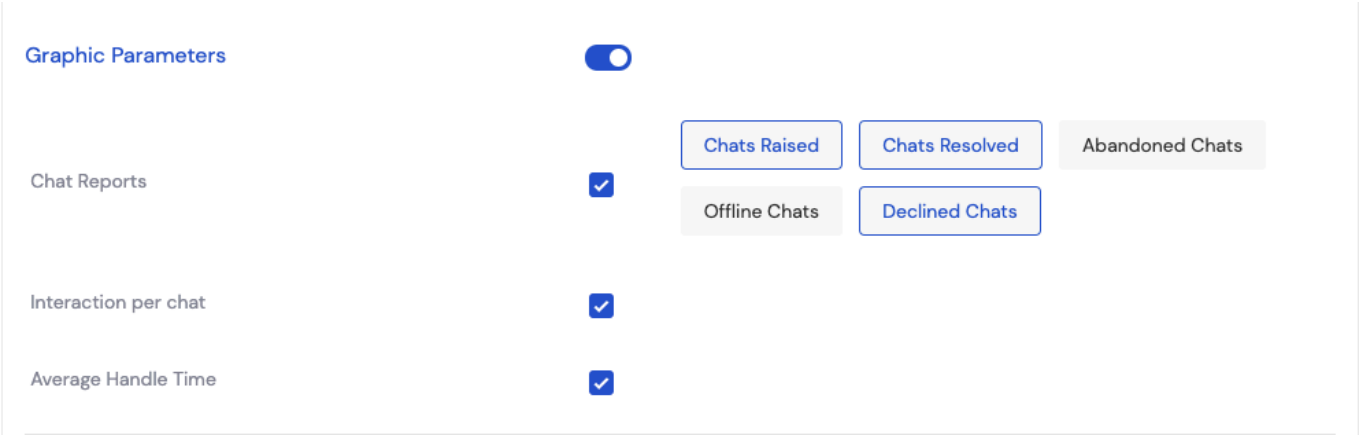
Note : All values are multi select.

Record Parameters : These are the records/data to be shown in the email. Multiple parameters like : Total Chats Raised, Total Chats Resolved, Agents Logged In, Abandoned Chats, Average Interactions per chat, Group Chats Engaged in Offline Chats, Average Handling Time, Customer Declined Chats.

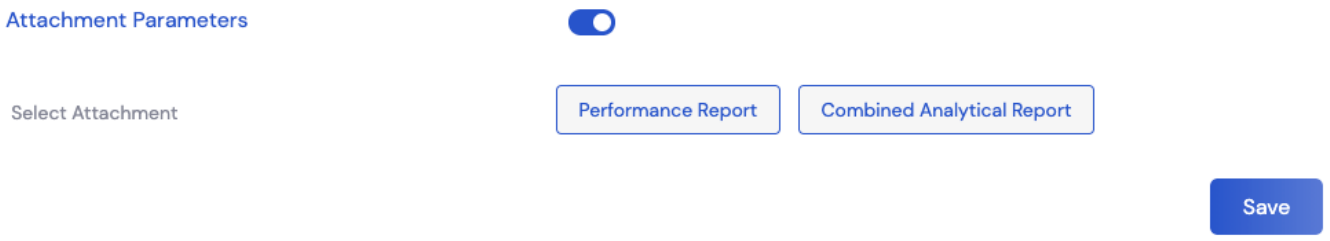
Note : All values are multi select.



Graphic Parameters : Graphic parameters can be enabled or disabled. Consists of Chat Reports, Interactions per chat and Average Handle Time. Note : Chat reports are multi select



Attachment Parameters : Attachment parameters can be enabled or disabled. Once enabled Attachment(s) can be selected.



Email triggered on the user side after creating the profile with selected parameters is shown below and can also be downloaded in excel sheet format.

success@allincall.in
to me

4:59 PM (2 minutes ago)

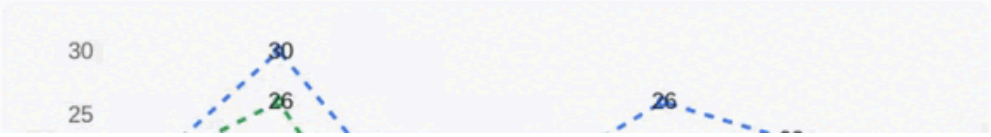
Cogno AI
by AllinCall

Here's usage analytics for LiveChat

August 16, 2021

Chart Reports

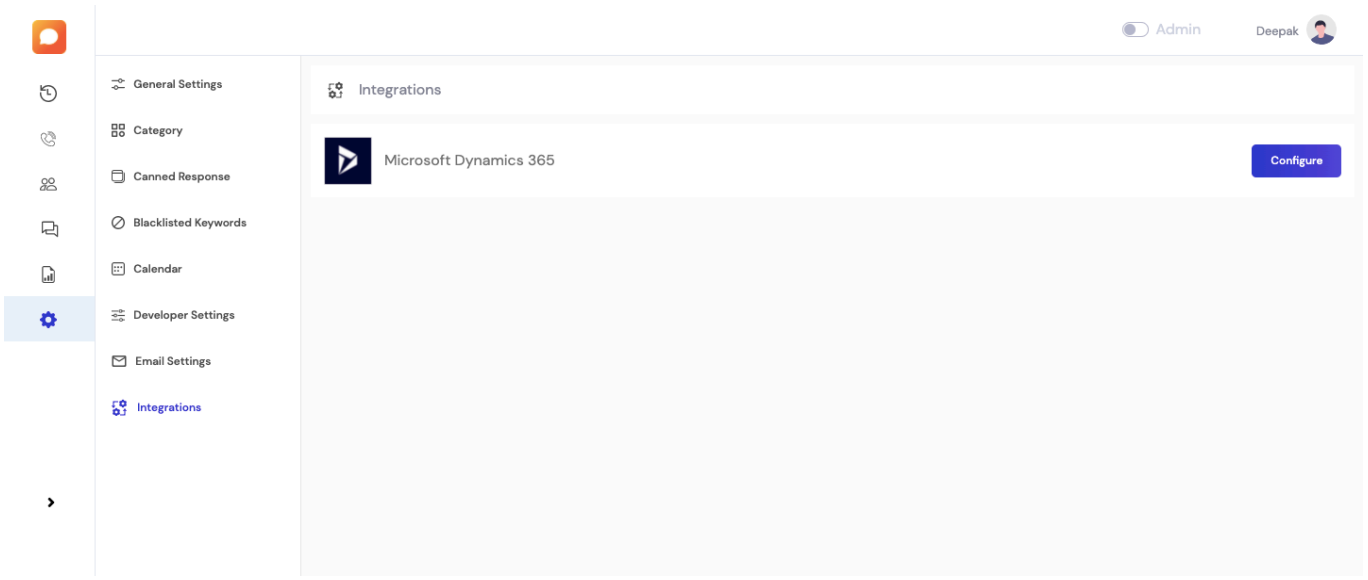
(15/08/21 - 21/08/21)

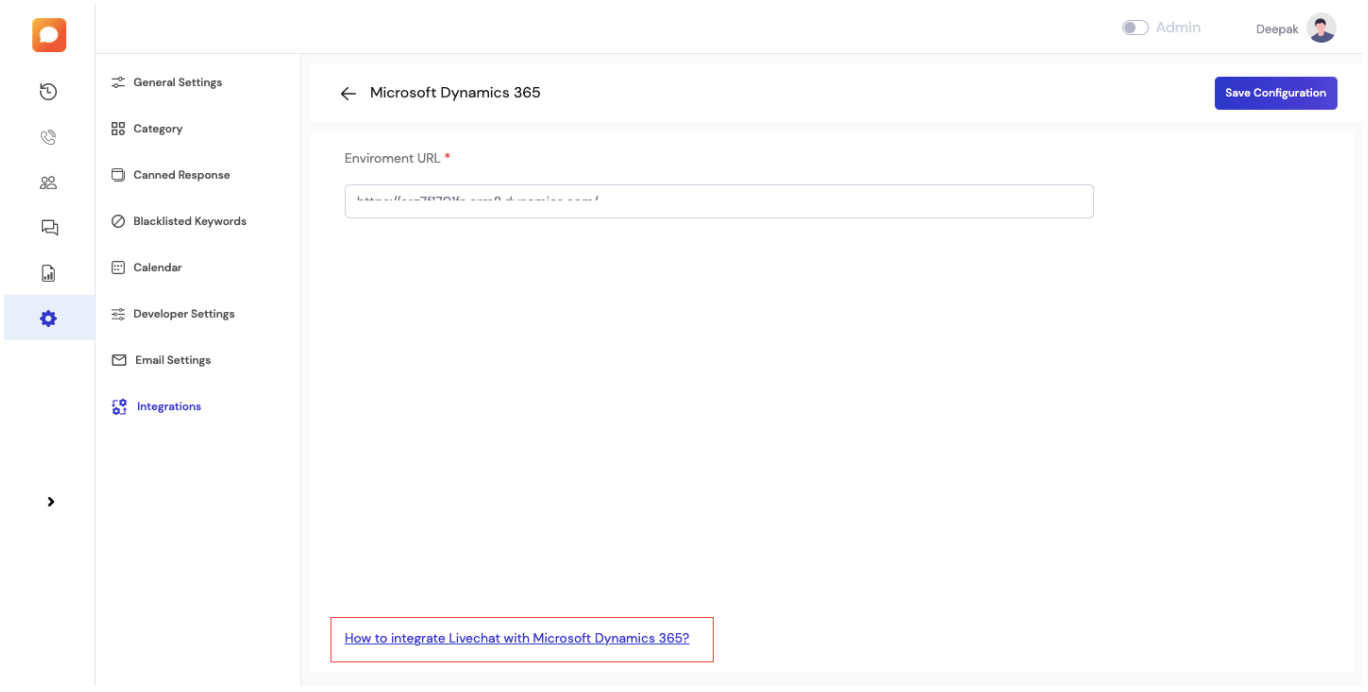


12.1.2.7.8. Integration

LiveChat with Microsoft Dynamics. **Integration document : Click Here**

This is visible under LiveChat Integrations > Microsoft Dynamics > Configure





Active Customers Dashboard LiveChat automatically assigns customers to an Agent. The Agent can view the chats that have been assigned to him/her in the tab “Active Chats”. After the LiveChat Agent and customer have connected, they can initiate the session and resolve queries.The LiveChat agent can also send Images and PDF documents if necessary.

Voice to text functionality In case the Agent is still not able to help the customer, they can choose to transfer the chat to another Agent who is online. They can also choose Auto Assign, in which case, LiveChat will automatically assign the session to another agent.If the conversation between customer and agent is over, the agent can then end the chat by providing a closing category to the chat. - Asynchronous Chat (LiveChat)Invite agent for group chat with a customer : Agents will have an option to invite another agent while interacting with the end user to solve the customer queries.Multiple Agent in an Ongoing Chat : LiveChat admin can configure the number of agents that can be added in a single chat.

Archived Chats The Chat History of all the Chat sessions that have been successfully completed by the agents can be viewed in the tab “Archived Chats”. Surfing chat history using next and previous buttons.

Request in Queues If the agent capacity is full for the LiveChat, now the agents can view & self-assign waiting chats. These waiting chats are sometimes getting dropped.

SettingsProfile - Agent can view all the information provided while creating an account and who is his/her supervisor.Calendar- Agent can view the working days and work timingsGeneral settings- Agent can enable Desktop notifications (If possible)

Fetching Agent Details from CRM Whenever an agent is chatting with a customer, the same customer details would automatically pop up in the CRM below the LiveChat iFrame.

Refer the below shown demo for better understanding

Please note : (Limitations)

1. **Prerequisites from client end:**

1. UAT Server Credentials (With required permissions set)2. Already populated Dummy Customer details inside CRM instance3. In case of API requirement (if retrieve data api doesn't work) we would need support from MSD Team

1. If the user tries to Save the configuration without providing a URL we would restrict them by showing an error message.
2. Presently even if the user provides an invalid environment url and saves the configuration there is no option to detect if the user has posted an invalid url and saved the configuration. For this we are not displaying an "Integration Active" status with MS Dynamics Integration Tile.
3. The customer details from CRM won't pop up when agent connects if the customer entry is not their in the CRM from before the chat session

12.1.3. Supervisor

LiveChat Supervisor Walk Through :

Google Drive (**Click Here** to play the video in a new tab)

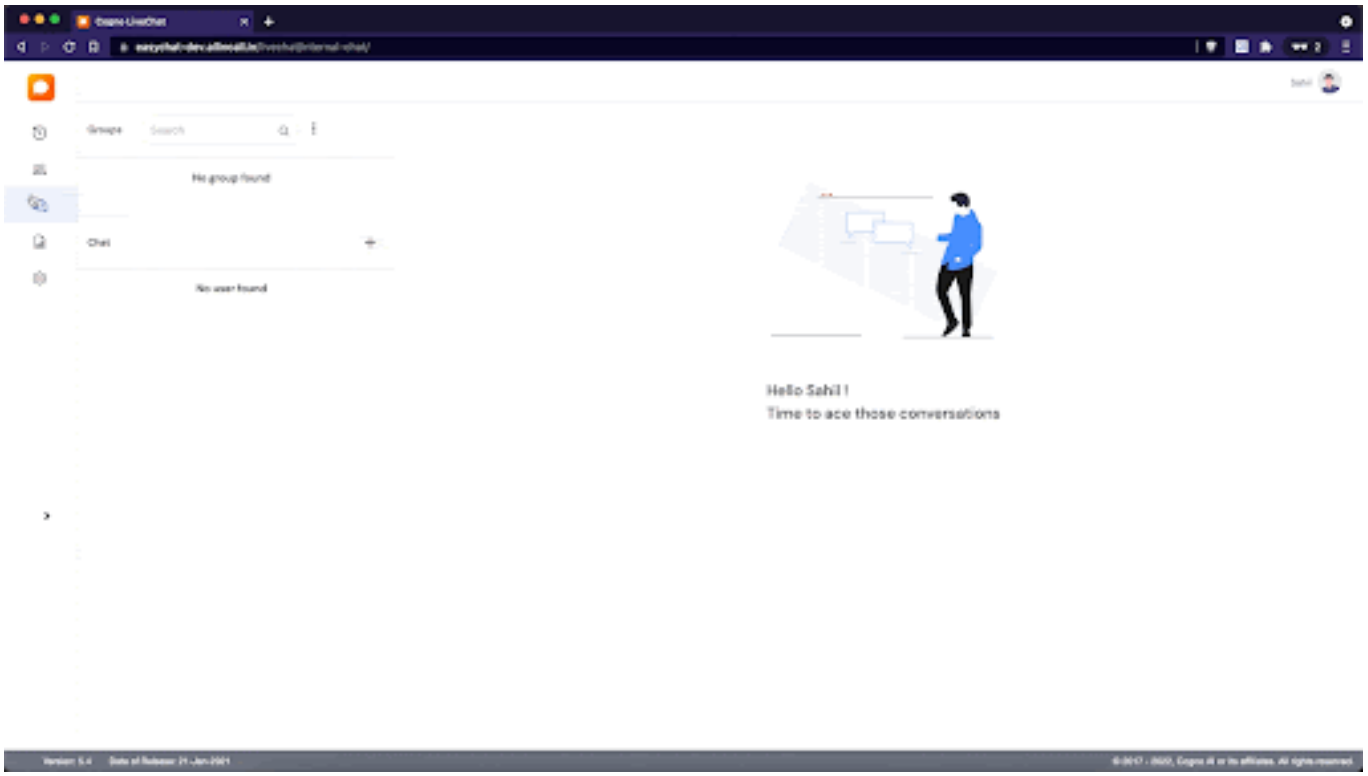
Supervisor

- The supervisor now has access to creating groups.

- The supervisor must create a new group and he will be able to change the group name, the group icon and the description of the group.

- The supervisor is allowed to add the admin and any agent that is assigned to him.

Refer to the below-shown demo for better understanding or click here



Chat Escalation Matrix

The supervisor can set the blacklisted keywords only for the agent. He can also allow the user to report the chat and can review the reported chats. In case he feels the need to block a user he has the option to do so.

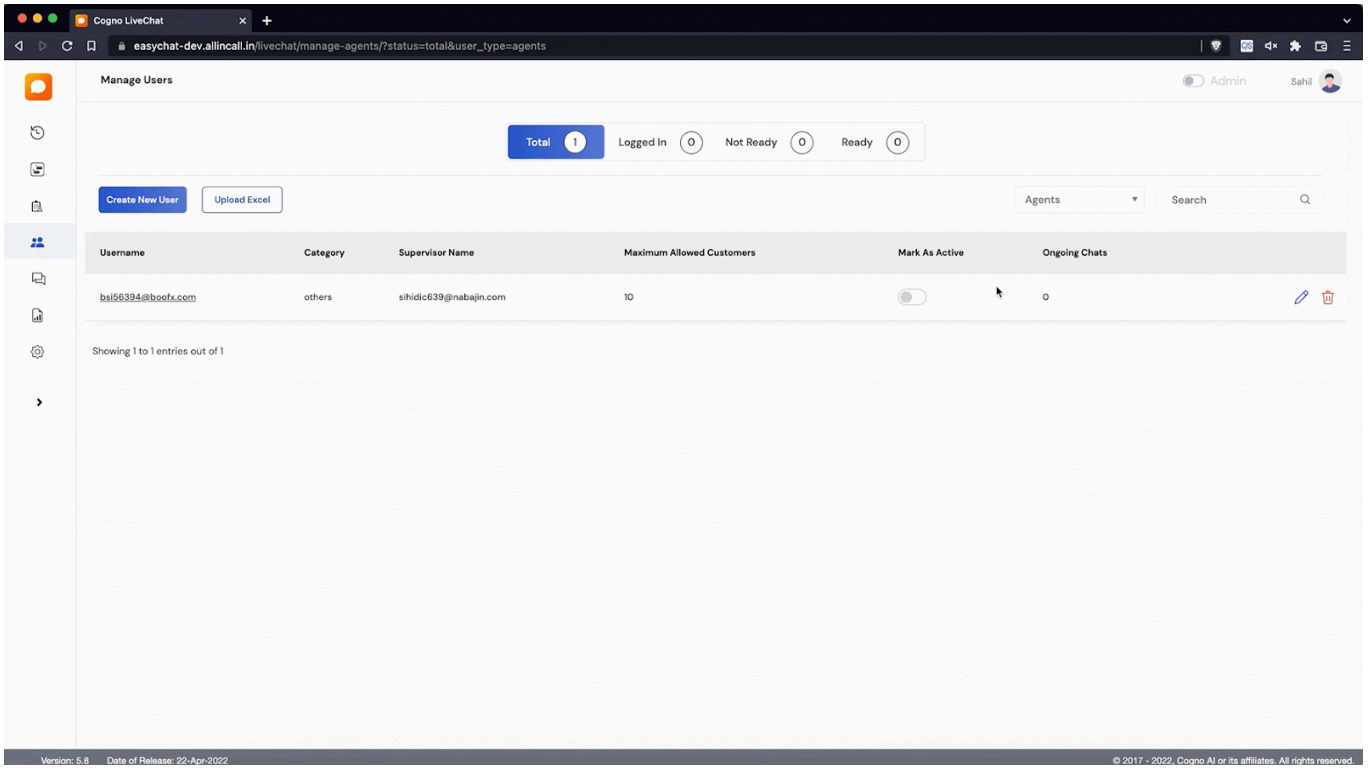
Please note : (Limitations)

The supervisor can only access reported or blocked lists once it is enabled via Django Admin

Admin Reassigns Supervisor

This feature allows the admin to reassign agents to different supervisors whenever necessary. This would be done by clicking on the 'Manage User' option from the Left-Hand section of the

Admin Console.



Please note : (Limitations)

1. Once an Agent is assigned to a new Supervisor, they will still be part of groups that they were assigned to earlier by the last supervisor but will now be assigned to the new assigned Supervisor and hence only the new Supervisor can take actions like remove that agent.
2. In case when the new Supervisor is not part of the old group, then that agent will be removed from the old group and they will have a view that an agent sees when they are removed from a group with only the provision to delete it.
3. Supervisors can be reassigned only when the agent is offline.
4. Agent's categories will be updated to Supervisor's categories once Supervisor is changed.

12.1.4. Agent

Active Chats

Feature Name	Definition
Active Chats	-LiveChat automatically assigns customers to an Agent. The Agent can view the chats that have been assigned to him/her in the tab “Active Chats”. After the LiveChat Agent and customer have connected, they can initiate the session and resolve queries.- The LiveChat agent can also send Images and PDF documents if necessary. -Voice to text functionality-Agent can use the canned responses by typing ‘/’ in the textbox and then can select the canned response displaying as suggestions above the textbox.-In case the Agent is still not able to help the customer, they can choose to transfer the chat to another Agent who is online. They can also choose Auto Assign, in which case, LiveChat will automatically assign the session to another agent.-If the conversation between customer and agent is over, the agent can then end the chat by providing a closing category to the chat.- Asynchronous Chat (LiveChat)If the same customer raises a request on LiveChat from the chatbot then it will also load that customer’s previous chats. • VOIP available as an option • Previous chats on the bot will be visible to the agent

Request In Queues	If the agent capacity is full for the LiveChat, now the agents can view & self-assign waiting chats. These waiting chats are sometimes getting dropped.

Archive chats	The Chat History of all the Chat sessions that have been successfully completed by the agents can be viewed in the tab “Archived Chats”.

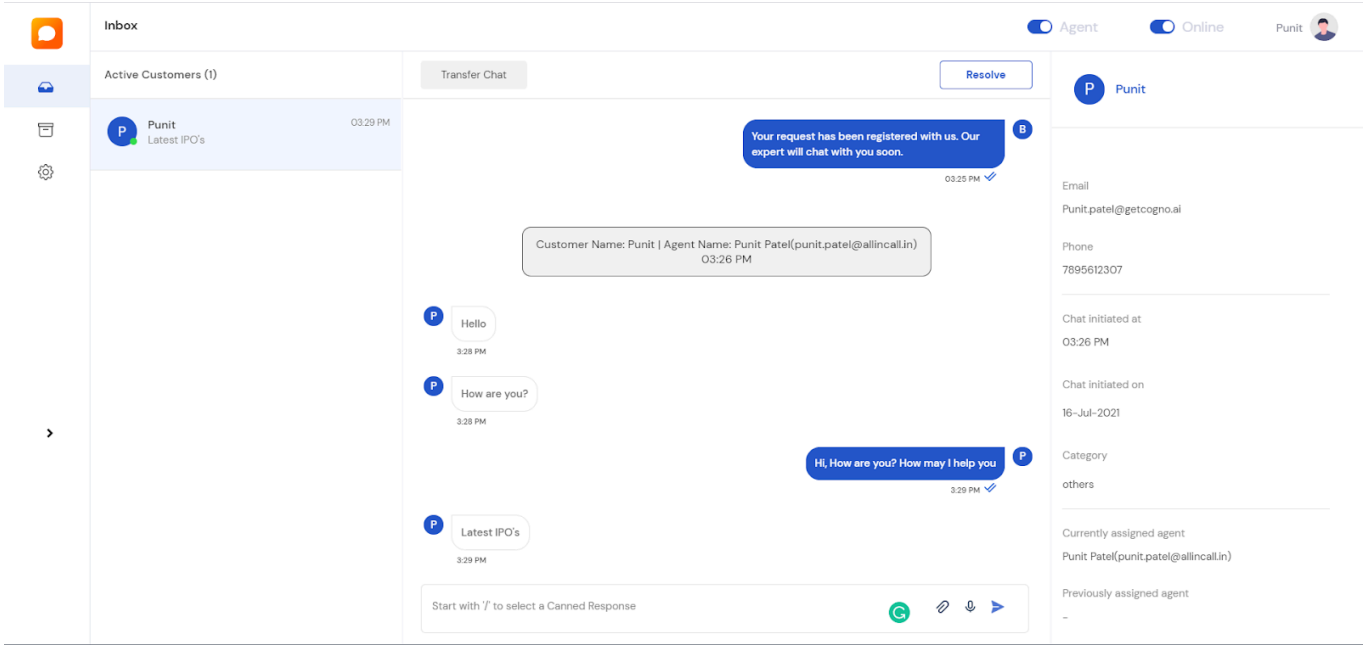
VOIP	

Settings	• Profile- Agent can view all the information provided while creating an account and who is his/her supervisor. • Calendar- Agent can view the working days and work timings • Canned response - Agent can also add canned responses which will be reflected for his/her account • General settings- Agent can enable Desktop notifications

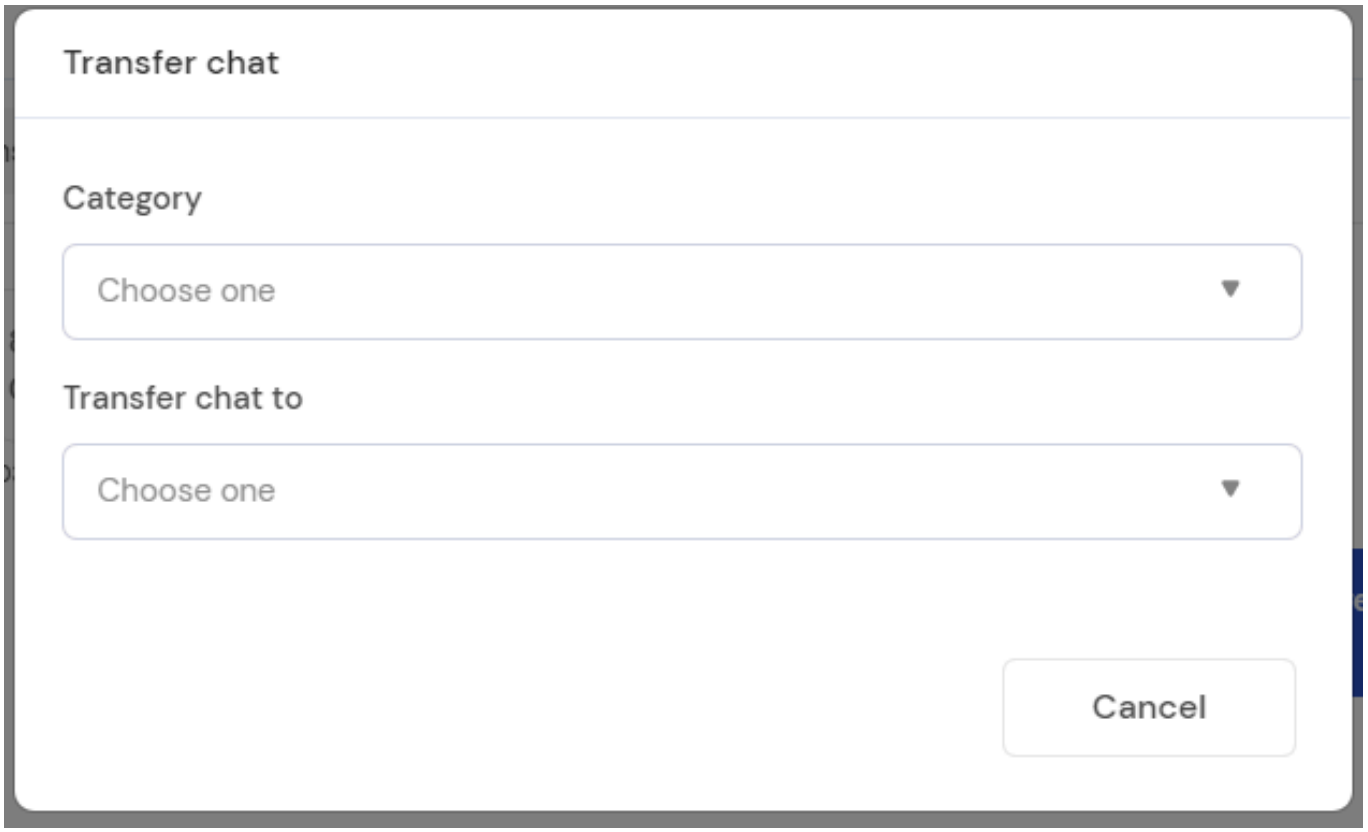
Online/Offline toggle	Agent can toggle online once he is ready to do conversation with customers and can toggle offline by providing a reason such as Stop interaction, Lunch, Meeting, Ad hoc,Training, coffee.
Bifurcation of Source	Lead is active from which source (smartphone or desktop) will be visible to the agent in the customer detail section.
Invite agent for group chat with a customer	Agents will have an option to invite another agent while interacting with the end user to solve the customer queries.
Multiple agent invite in an ongoing chat with a customer	LiveChat admin can configure the number of agents that can be added in a single chat.

12.1.4.1. Active Chats / Inbox

LiveChat assigns customers to an Agent on a round robin basis or based on the category selected by the bot users. The Agent can view the chats that have been assigned to him/her in the tab “Active Chats”. After the LiveChat Agent and customer have connected, they can initiate the session and resolve queries. The LiveChat agent can also send Images and PDF documents if necessary.



In case the Agent is still not able to help the customer, they can choose to transfer the chat to another Agent who is online. They can also choose Auto Assign, in which case, LiveChat will automatically assign the session to another agent.



After the Customer’s queries have been resolved, the agent can End Chat.

Asynchronous Chat (LiveChat) If the same customer raises a request on LiveChat from the chatbot then it will also load that customer’s previous chats.

An example for the same is shown below

VOIP Calling (Agent side)

On clicking on the **Initiate VOIP** call under the section Perform actions, a VOIP request will be sent to the customer. At the customer's end, a consent to accept or reject will be taken post which actions will be performed.

If the Customer clicks on reject, at the agent's end the status of the performed actions in the Customers detail will be changed to "Request rejected", a toast will be displayed and a

system notification will be added in the ongoing chat.

Clicking on "Resend request" the VOIP will be initiated again.If the customer accepts the VOIP call then a toast for request acceptance will be displayed, browser notification for the same will be available and the system notification will be added in the ongoing chat.Clicking on the connect button, if VOIP in PIP is enabled then a small rectangular draggable screen will be added.

Note: The transfer chat option will be disabled.

LiveChat + Video Call

To use the functionality the admin needs to enable this using LiveChat > Settings > General settings> Enable Voice/Video Call > Allow End Customer To Initiate Video Call Toggle

- The agent can initiate the video call from his end in case he wants to talk to the customer.

- After clicking on the video call button a link is given to the customer to join the video call.

- When the customer joins the call the agent has to click on the connect button.

- The agent can then talk to the customer. They can see each other by keeping their videos on.

- If the Customer clicks on reject, at the agent's end the status of the performed actions in the Customers detail will be changed to "Request rejected", a toast will be displayed and a system notification will be added in the ongoing chat.

- Clicking on "Resend request" the Video will be initiated again.

- If the customer accepts the Video call then a toast for request acceptance will be displayed, browser notification for the same will be available and the system notification will be added in the ongoing chat.

Refer to the demo for better understanding - click here

Previous Chat History Visibility

Previous chats by the end customer on the bot will be visible to the agent if LiveChat is connected.

Note : Only the last 10 messages combined (Customer query and the bot responses) will be visible.

Refer the below shown demo for better understanding

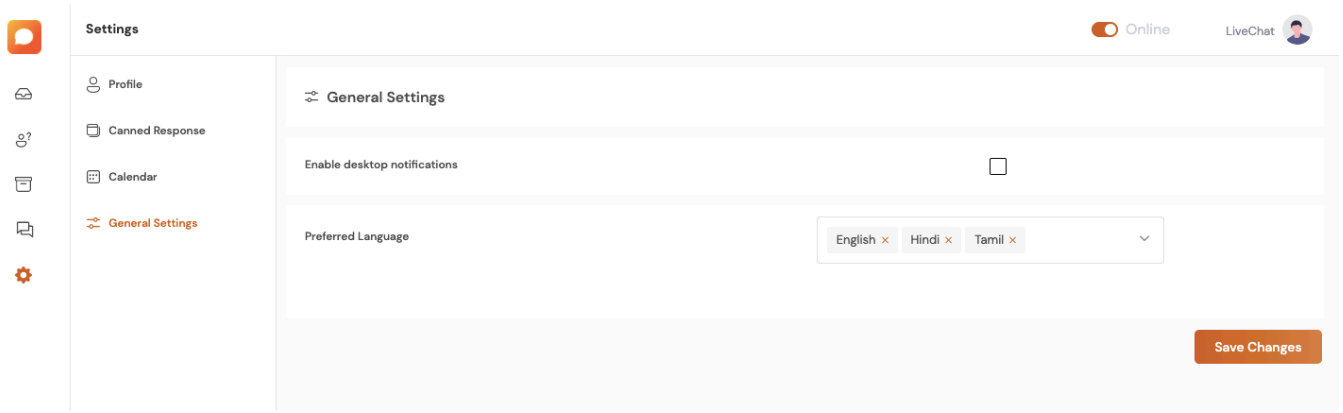
Virtual Interpretation (Multilingual)

Agents will be able to specify their preferred language and still be able to converse with a customer, who might be using a language other than their preferred language.

Please note - The optionality to enable or disable this feature is given in the Django Admin section and will be set to Enabled by default.

This is visible under :

Agents Side To configure : LiveChat (Agent Side) > Settings > General Settings > Preferred Language



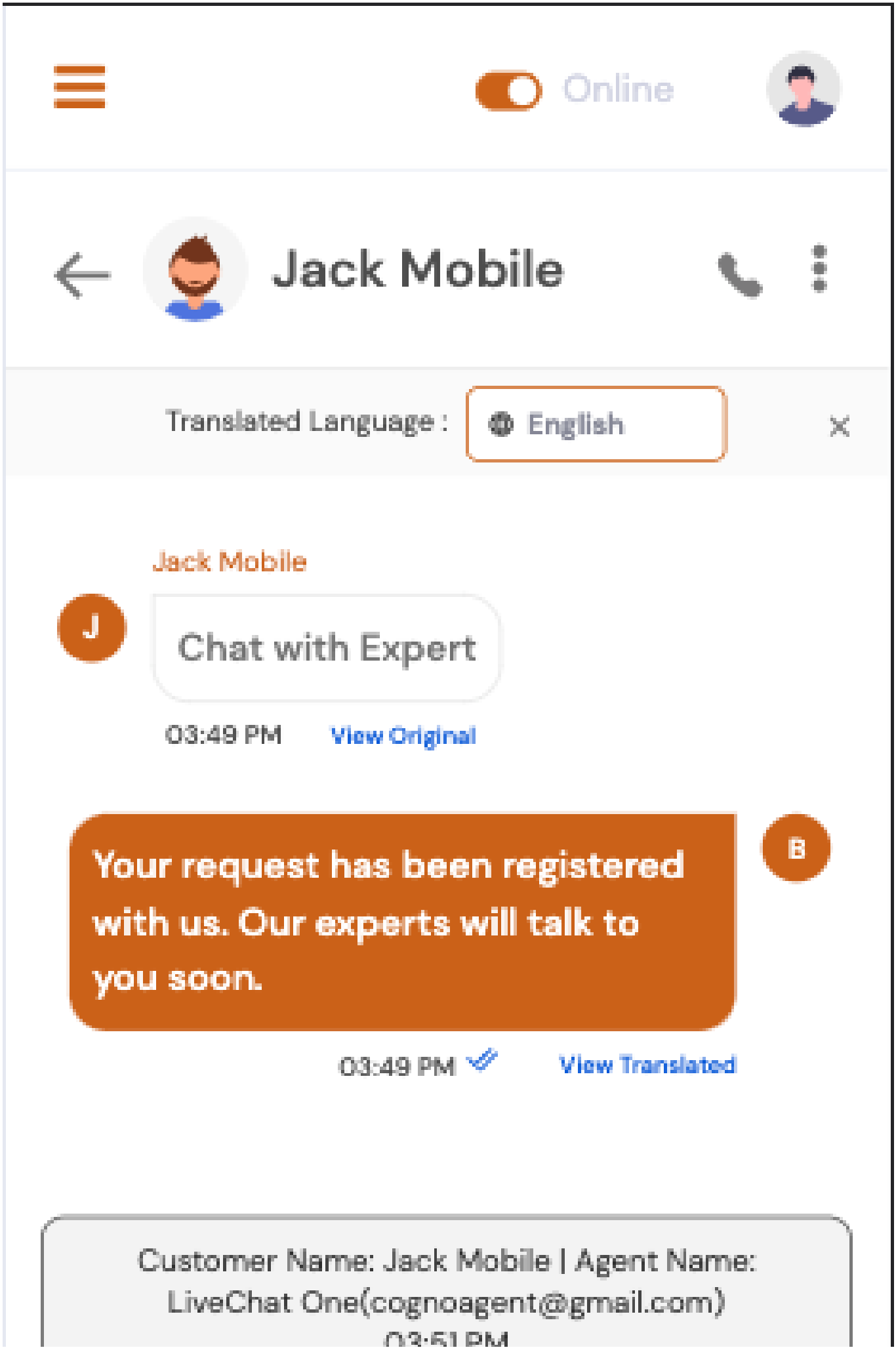
Agents can select the preferred languages. (Multiselect is available).

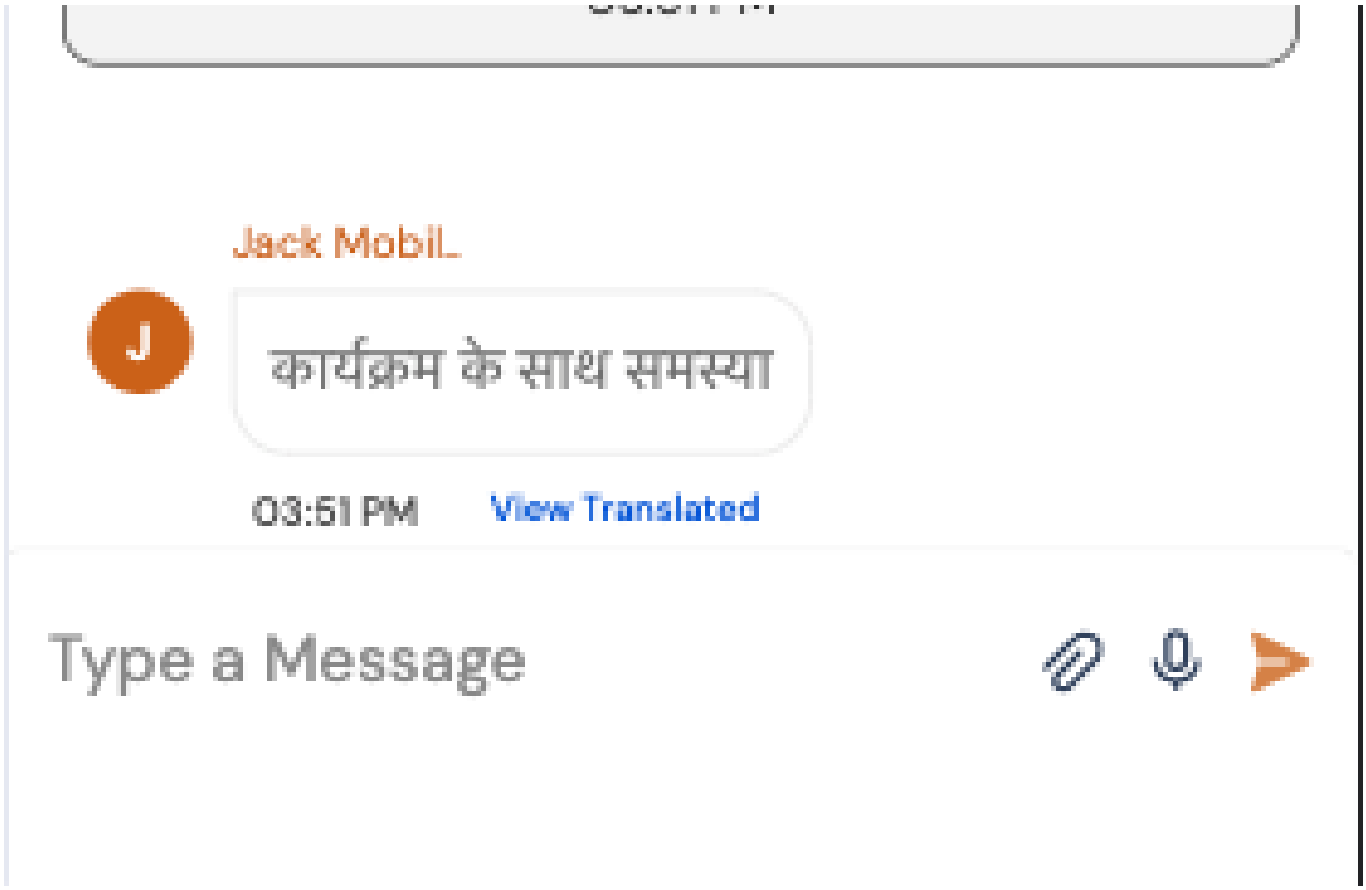
Once preferred language are added by the agent, in a case where customer interaction initiates where the customer is using any other language than the one listed by the user as their preferred language, then a notification is showcased at the top bar of the conversation window, where the system detects and showcases 'Detected Language - **ENGLISH**' with a 'Translate' button next to it.

Translate button : shows a list filled with all the preferred languages selected by the agent and they can select one from this list. Once selected, **all the messages** turn into the preferred languages opted by the agent.

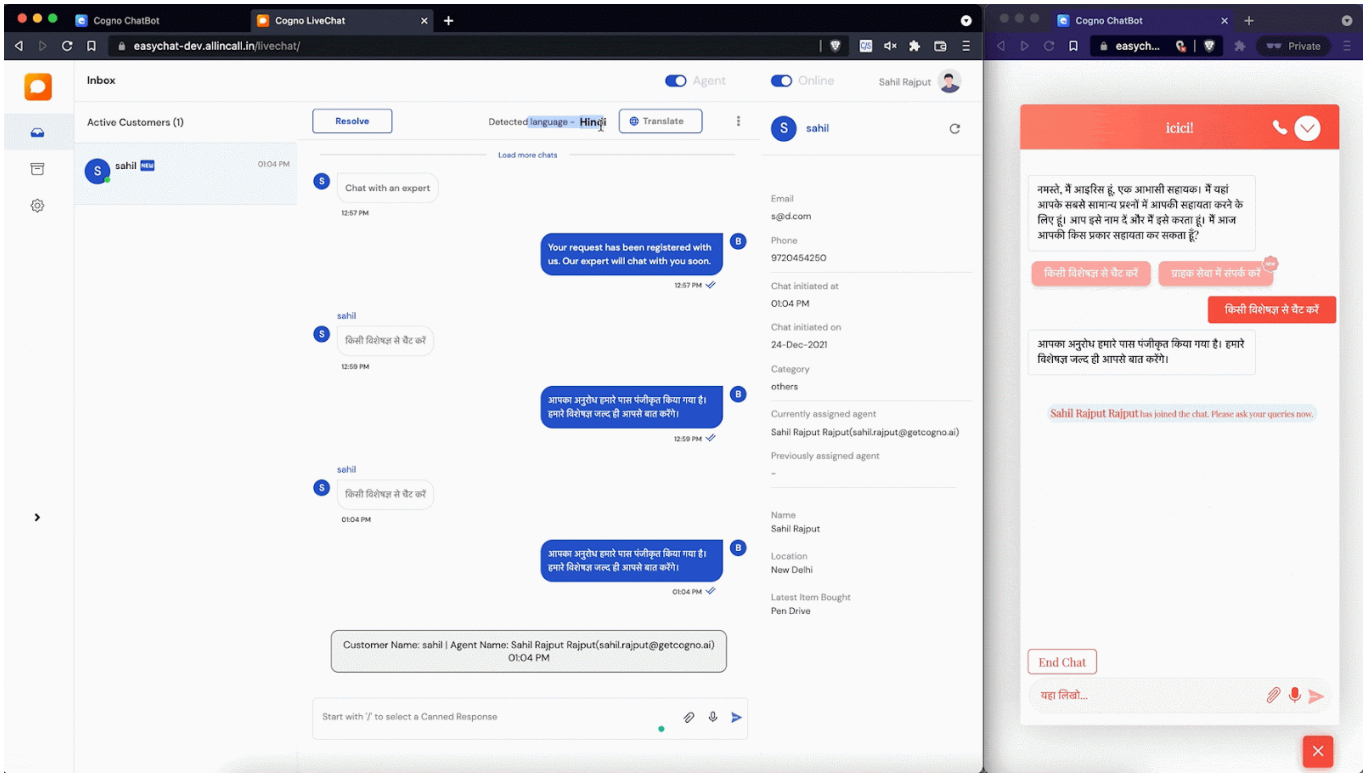
- Clicking on **View Original** will help agents to view the messages in their original language.
- Clicking on **View Translated** will help agents to view the messages sent in the language preferred by the end customer.
- Clicking on **See Translation** will translated back to the original message language

Mobile View :


Online
Jack Mobile
Translated Language :
English
Jack Mobile
J
Chat with Expert
03:49 PM
View Original
Your request has been registered with us. Our experts will talk to you soon.
B
03:49 PM
View Translated
Customer Name: Jack Mobile | Agent Name: LiveChat One(cognoagent@gmail.com)



Refer the below shown demo for better understanding or click here



Please note : (Limitations)

1. Languages in this list will be filled based on all the languages possible by the translator our system is using.
2. By default, the English language will always be selected, which cannot be deselected for now.
3. The language selected for the bot by the admin will also be selected by default.
4. If no preferred language is selected, then in that case the default language set for the bot will be showcased for the agent to translate along with English.
5. If another agent is added to this chat, they will also be prompted with the same option and their language will also be translated as per the preferences of the existing agent and the customer.
6. If the messages sent by the user are originally in the language preferred by the user, then also the prompt will be showcased to an agent who has more than 1 preferred language.
7. In case of no other preferred language, the option will not be shown .

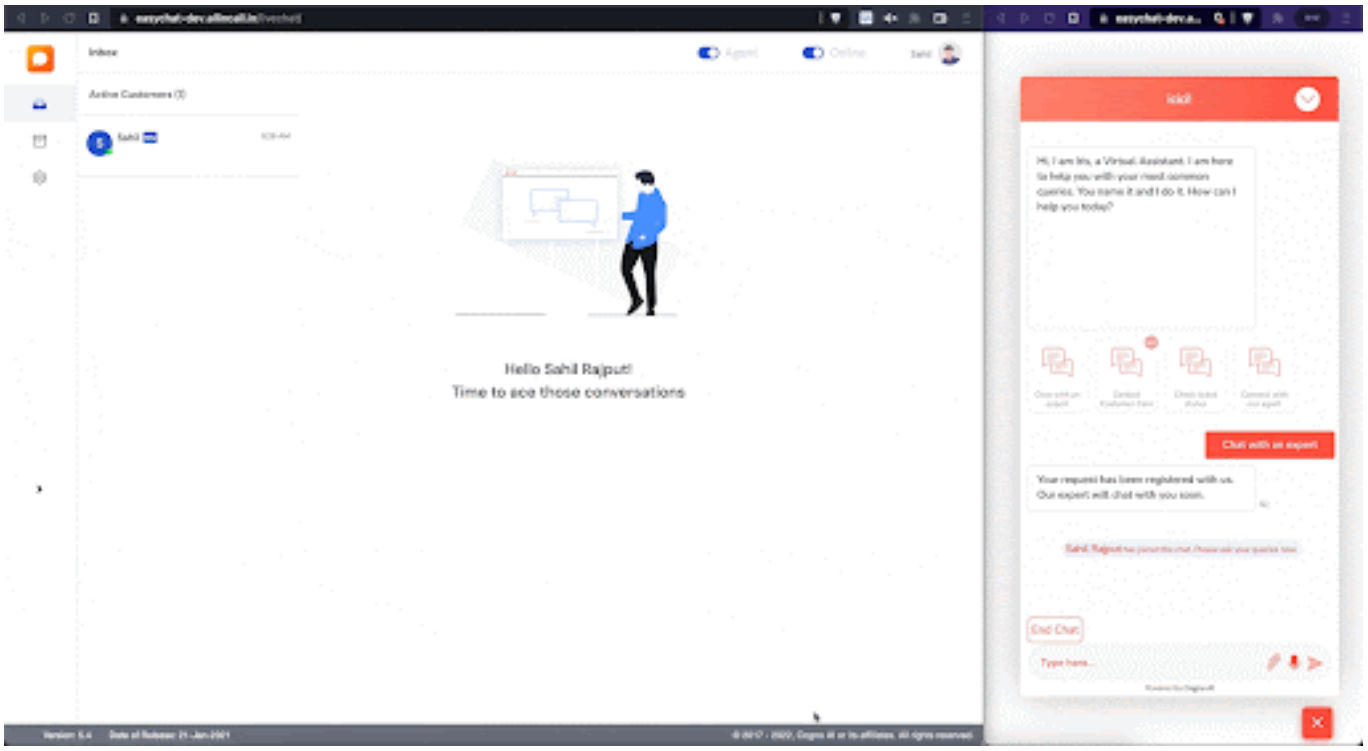
Ticket Management System

To use this functionality the admin needs to enable this using LiveChat > Settings > General Settings > Enable Raise a Ticket Functionality For Agent Toggle

- Agents will be able to raise tickets by clicking on the raise a ticket option.
- After that, he will have to fill up a ticket form. In that, there will be prefilled data about the customer.
- The agent has the access to change the data in case there is some error.
- He then has to select the category and describe the query.
- The agent can also attach relevant pictures if necessary.

- An option has been provided to view the previously raised tickets.

Refer the below shown demo for better understanding or click here



Please note : (Limitations)

1. No provision of PII Masking.
2. No validator present for phone number and email address etc.
3. Currently, if LiveChat is using Cogno Desk for TMS, it is first needed to be enabled at the chatbot end as well. If not, then it showcases an error when raising a ticket. This issue, however, will not occur when integrated to a third party vendor for TMS.

Chat Escalation Matrix

- The admin/supervisor will set the blacklisted keywords for the agent and the agent cannot use those words in the chat.

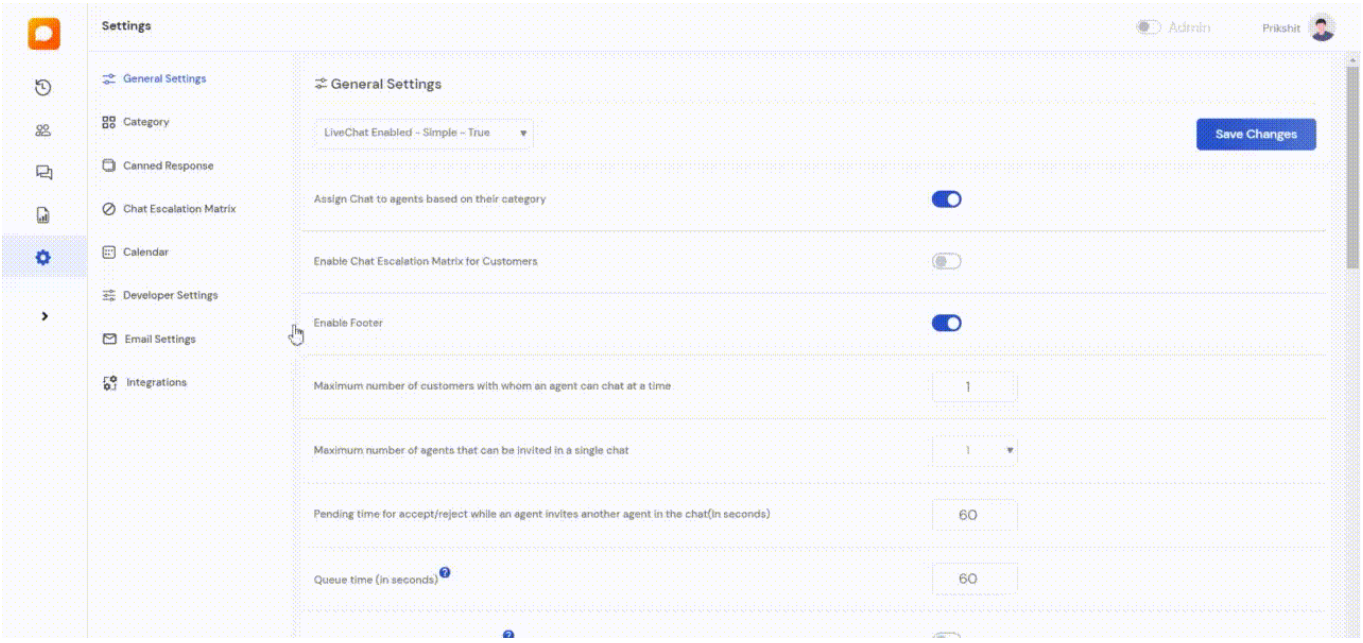
- If the customer uses a blacklisted keyword then the agent can warn the customer or choose to ignore it.

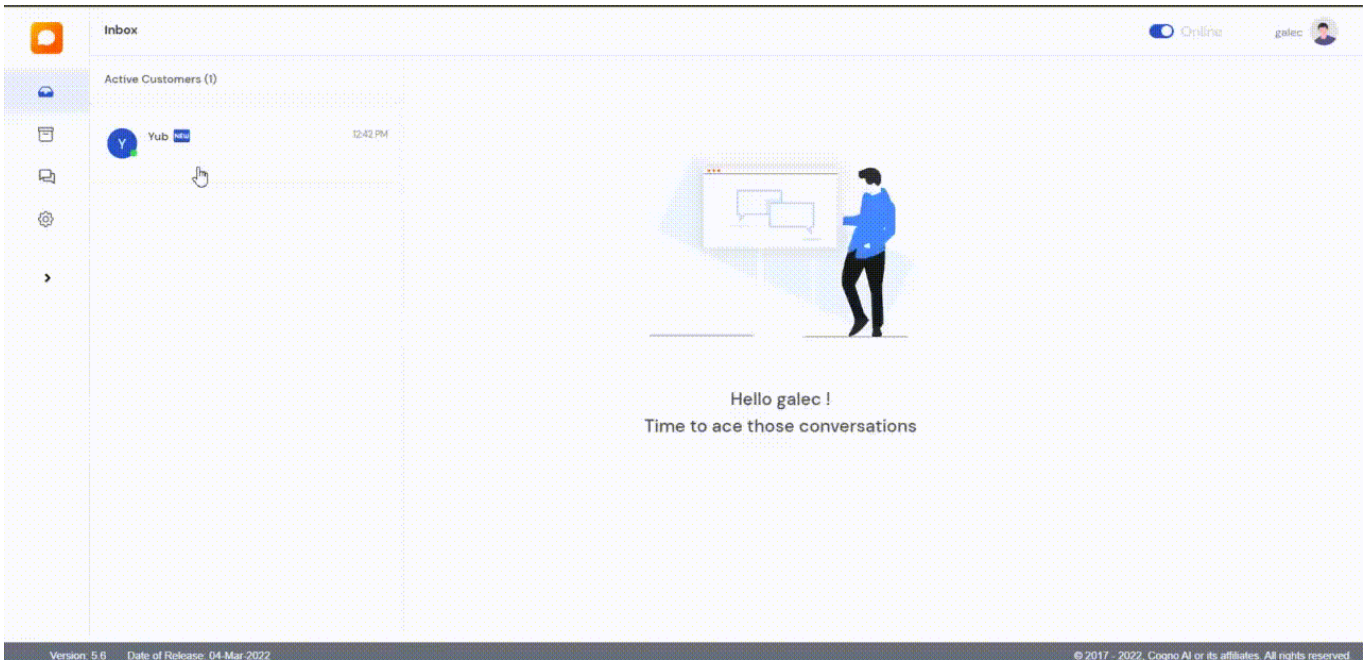
- Once warned if the customer uses a blacklisted word again then the agent has the option to report the customer.

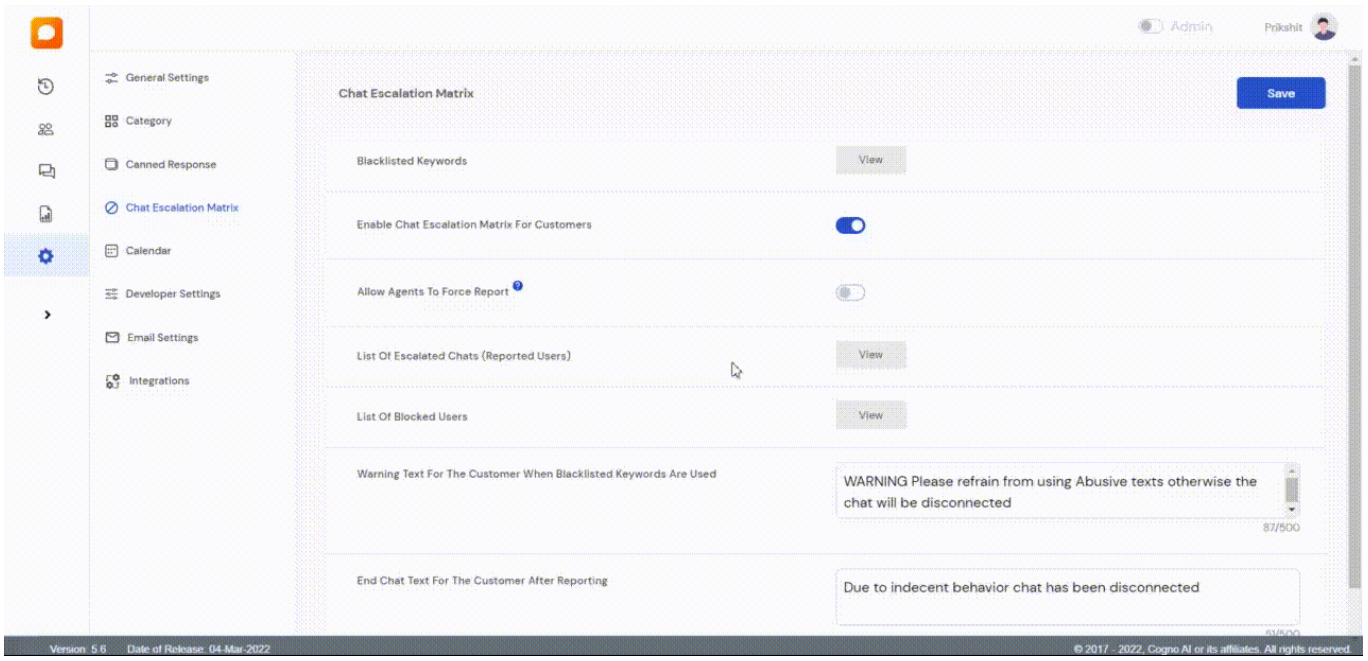
- Once reported the chat will be terminated and put into the reported chat list for the admin to review. The admin can also allow the agent to report a chat without warning the customer.

- In this case, if the customer is misbehaving then the agent can immediately report the chat without any warning.

Refer to the below-shown demo for a better understanding







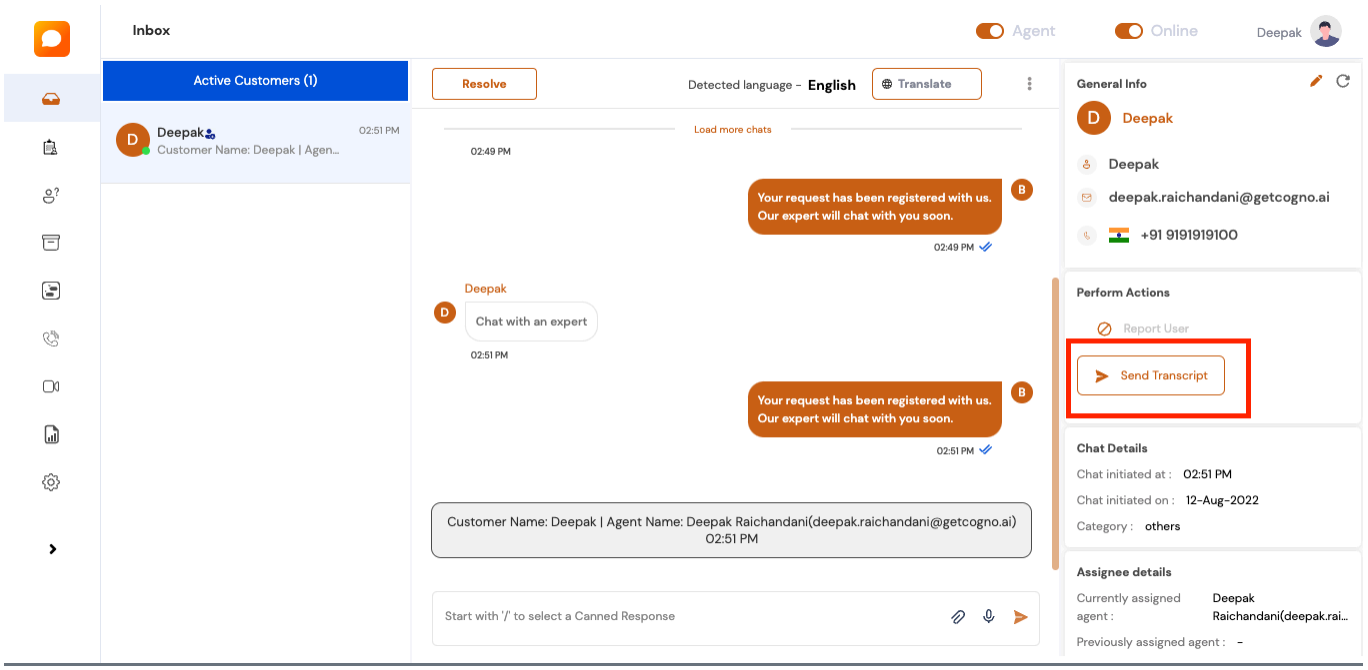
Please note : (Limitations)

1. Chat escalation is not enabled by default for the end customer
2. In case of multiple agents in a chat only the main or primary agent will be able to report/warn an end customer
3. Escalation of a chat is only possible if the language of the keyword used by the customer is the same as the language in which the keyword was added to the blacklisted keyword
4. If a user is reported their chat will be counted as disconnected by the system

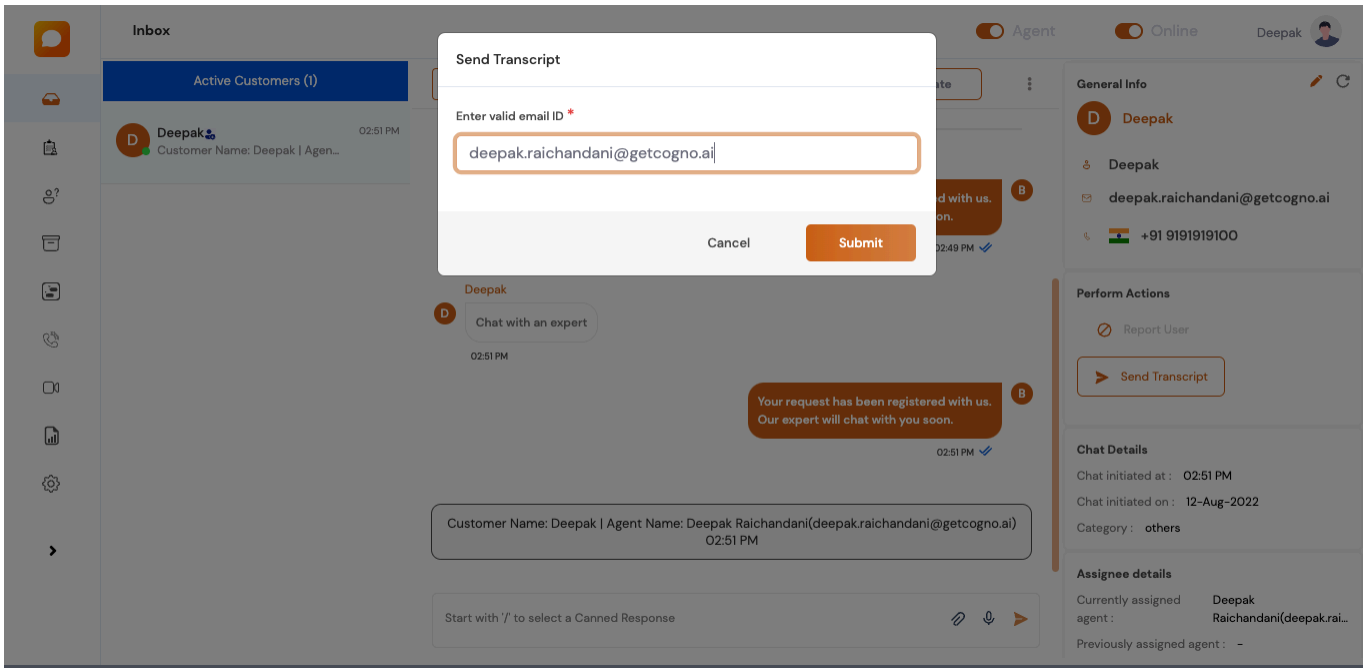
5. Any keyword added in the blacklisted list by a Supervisor will be added to the master list of the admin as well as for the rest of the supervisors too. Same for blocked customers.
6. If TMS is enabled, then even after reporting, the agent should be able to raise a ticket for that customer before resolving.

Chat Transcript to the customer

Agents will have an option to email the chat transcript to the customer's email id.**For the Agent:** If enabled by Admin, a send transcript button will be shown to the agent in the action panel of the agent during interaction with the end customer.



When the agent clicks on Send Transcript, a modal will pop up asking for an email address for the transcript to be sent.



Once added the transcript will be sent to the added email-id.

12.1.4.2. Request in Queue

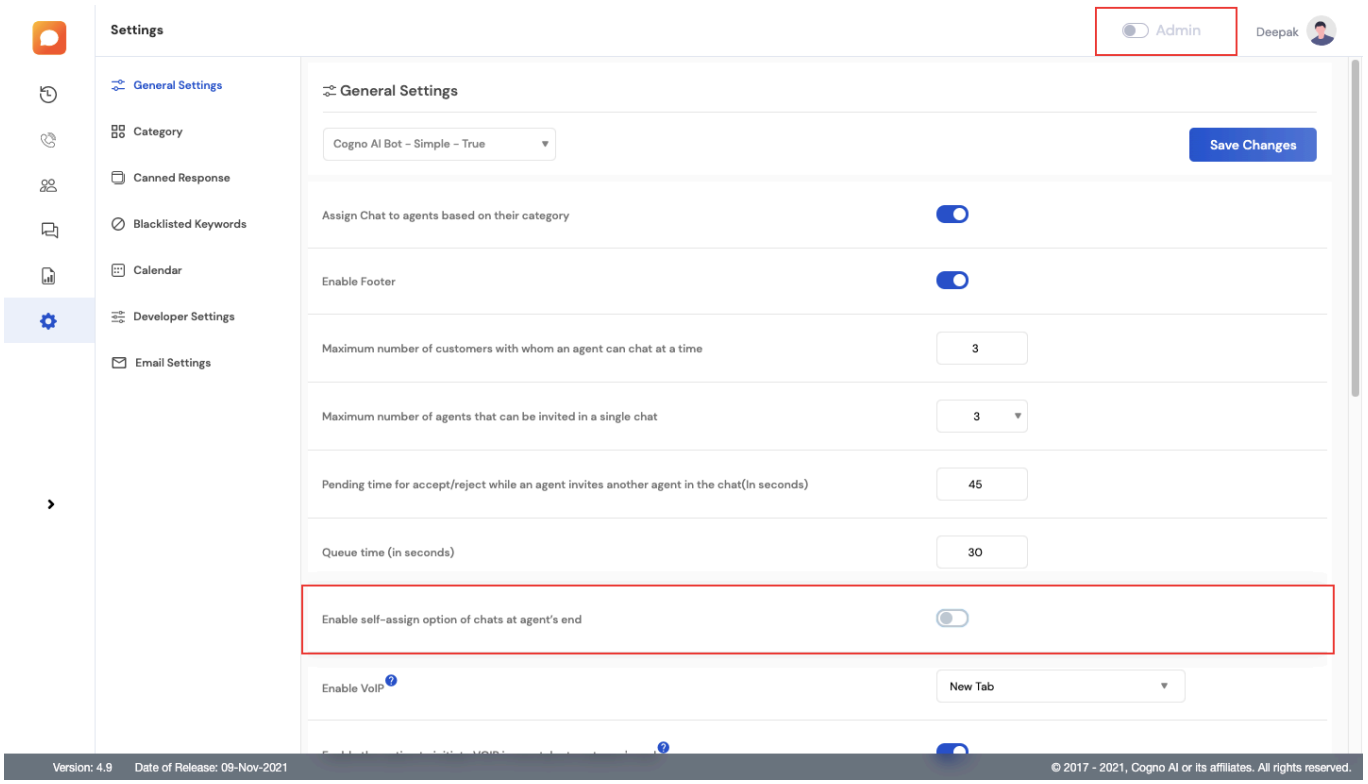
A page for Requests in Queue is added where the agent can view the chats that are "request in queue".

*Please note that this page will be visible only once the admin enables self assigning for agents from the admin general settings.

To enable Self Assignment for Agents :

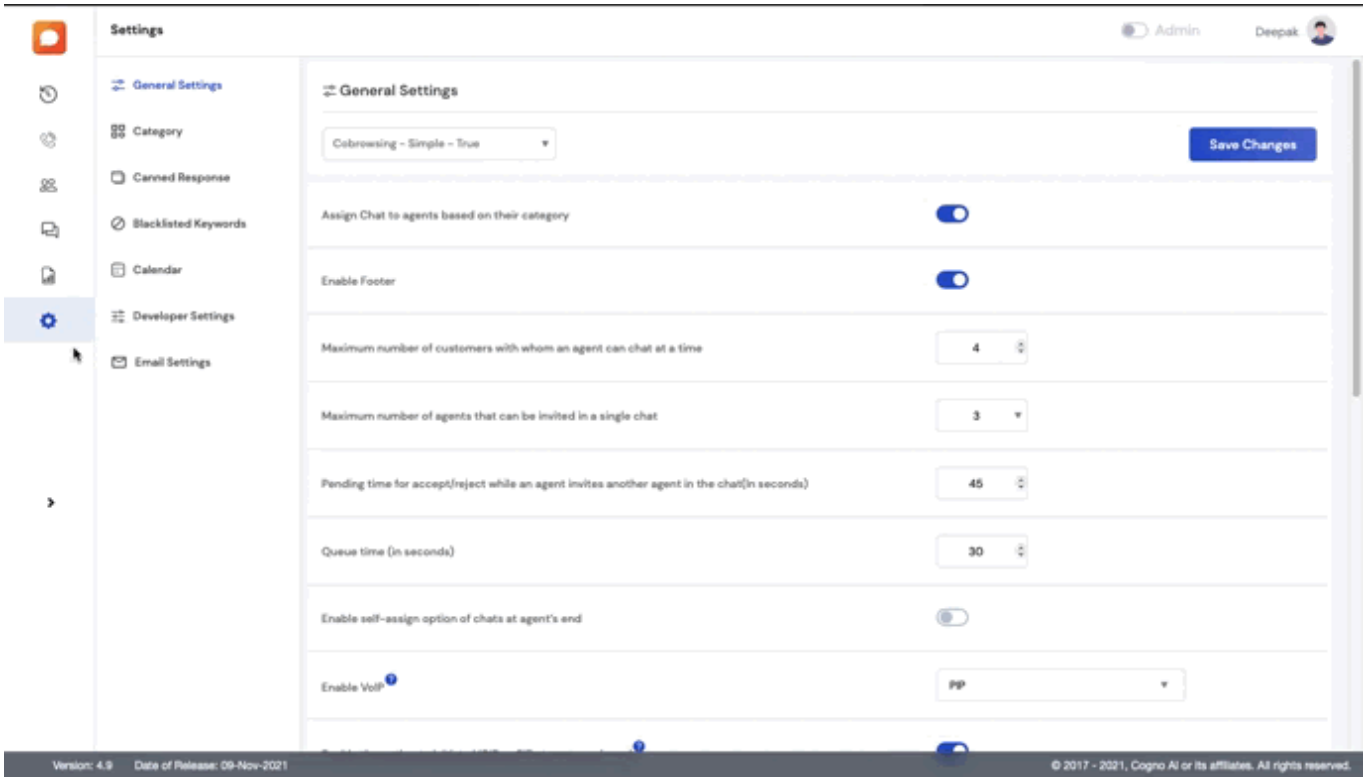
To enable this option : This is visible under Cogno Chatbot Cogno LiveChat Console (Admin Side) > Settings > General Settings > Enable self assign

Admin Side : To "Enable self-assign option of chats at agent's end" is provided. By default, the option will be off. On Enabling the toggle self-assign option of chats at the agent's end will be available.



Refer the below given demo for better understanding

To enable :



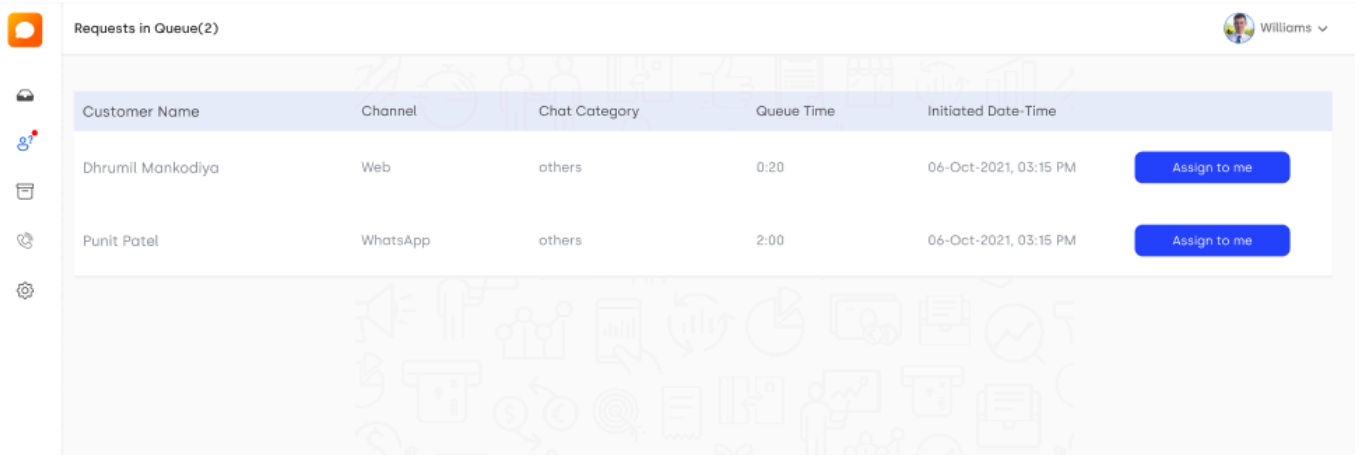
If Agent n has 2 categories assigned "Loan" and "Credit" then only these 2 categories requests will be displayed on the "Requests in Queue" page.

Notification on the icon in the left nav bar will indicate if chats are there in "Requests in queue".

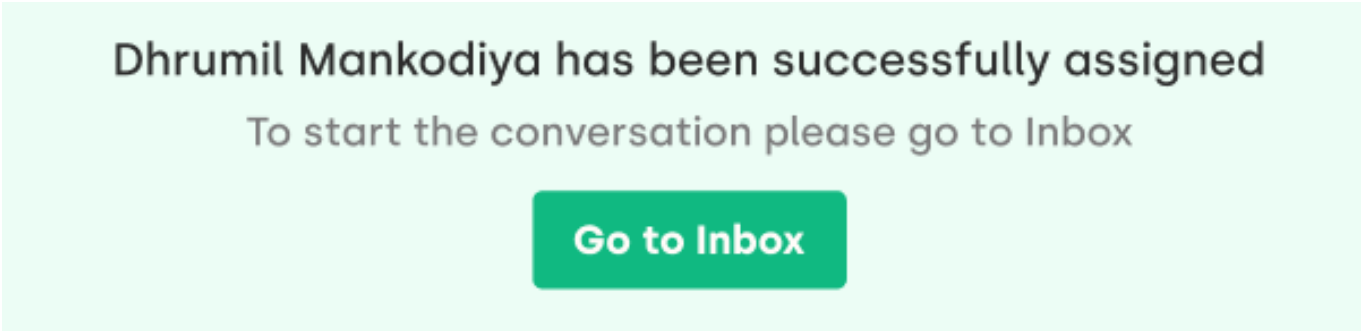
If the chats are "request in queue" due to the unavailability of agents then agents whose capacity is reached the max limit can self-assign chats by clicking on the "Assign to me" button on the "Requests in queue" page.

On clicking the "Assign to me" button, the status will be updated and the entry will no longer be seen in this list.

Agent side :



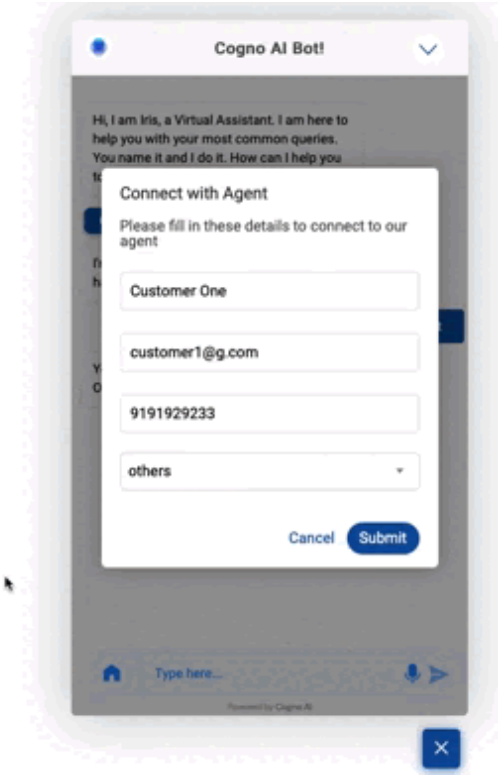
A modal will be displayed once the agent clicks on “Assign to me”. Clicking on “Go to Inbox” will take the user to the Active chat Page.



Please note :

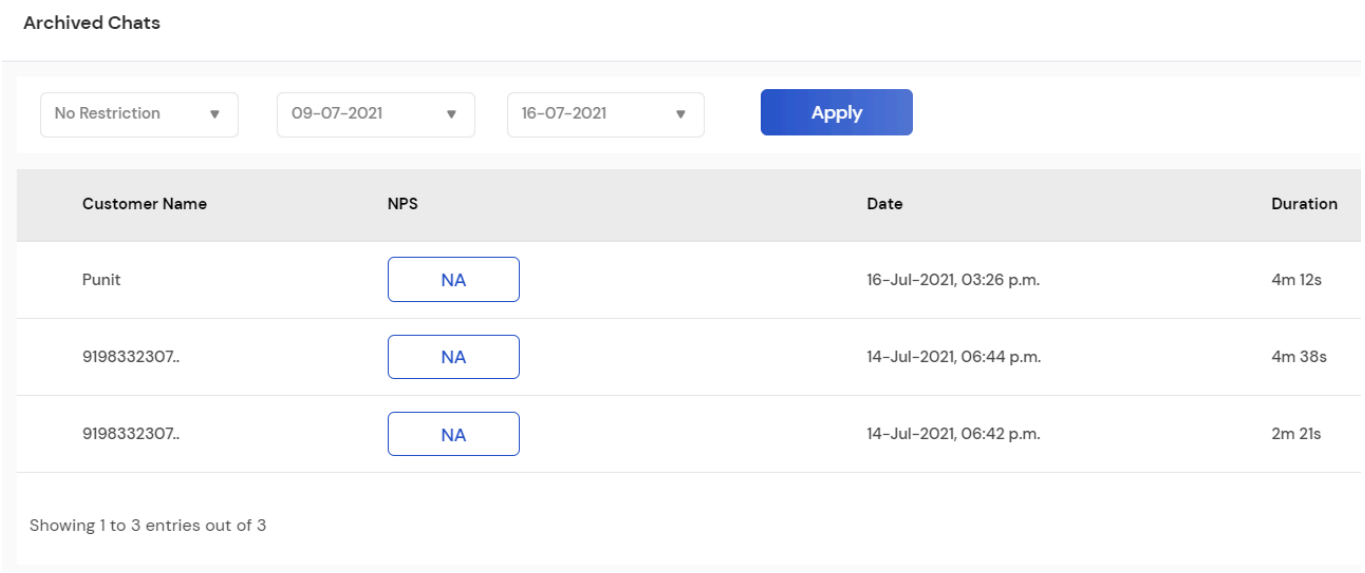
1. The modal will auto-hide in 10 seconds or the modal can be closed by clicking anywhere outside the modal.
2. If the chat got assigned to another agent then an error message toast will be displayed.
3. An icon will be added beside the name of the customer in the active customer pane to differentiate between chats.
4. If the maximum capacity of the agent is reached then also the agent can self-assign chats.
5. In the case of concurrency, the agent who clicked "assigned to me" and whose request got read first will be assigned the chat.
6. When the agent is offline he can still see the chat requests in the queue, but the 'assign to me' button will be disabled. When he makes himself online then he will be able to assign those chats to himself.

Agent Self Assigning a chat :


Cogno AI Bot!
Hi, I am Iris, a Virtual Assistant. I am here to help you with your most common queries. You name it and I do it. How can I help you
Connect with Agent
Please fill in these details to connect to our agent
Customer One
customer1@g.com
9191929233
others
Cancel
Submit
Type here...

12.1.4.3. Archive Chats

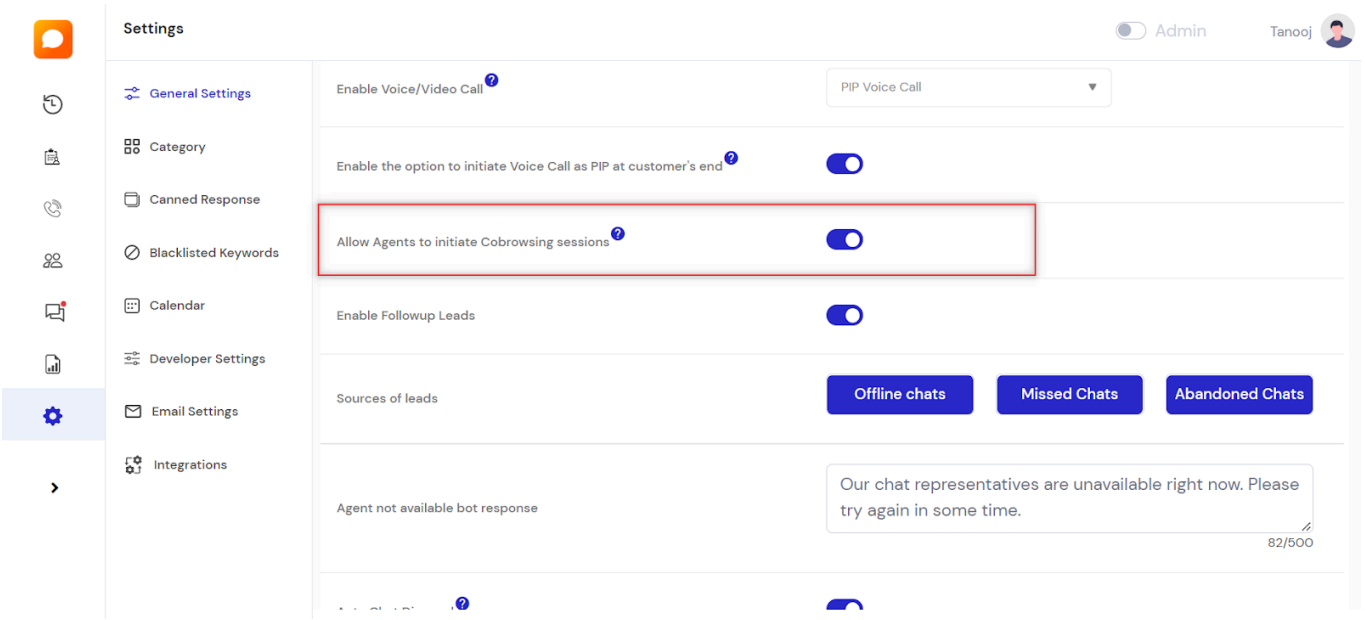
The Chat History of all the Chat sessions that have been successfully completed by the agents can be viewed in the tab “Archived Chats”.



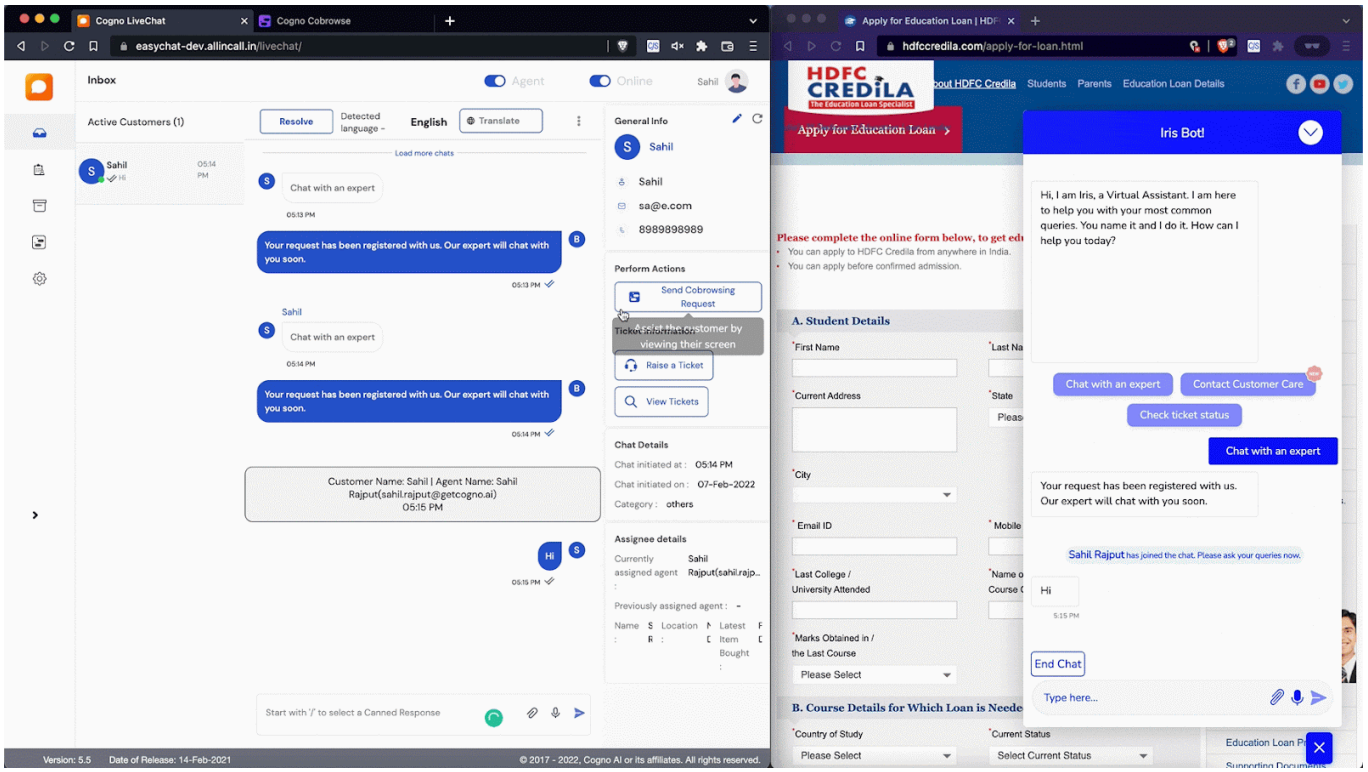
12.1.4.4. Co-browsing in LiveChat

A functionality is present that allows the agent to have co-browsing sessions with the user directly through the LiveChat.

To configure : This is visible under : LiveChat> Setting> General Settings> Allow agents to initiate Co-browsing sessions toggle



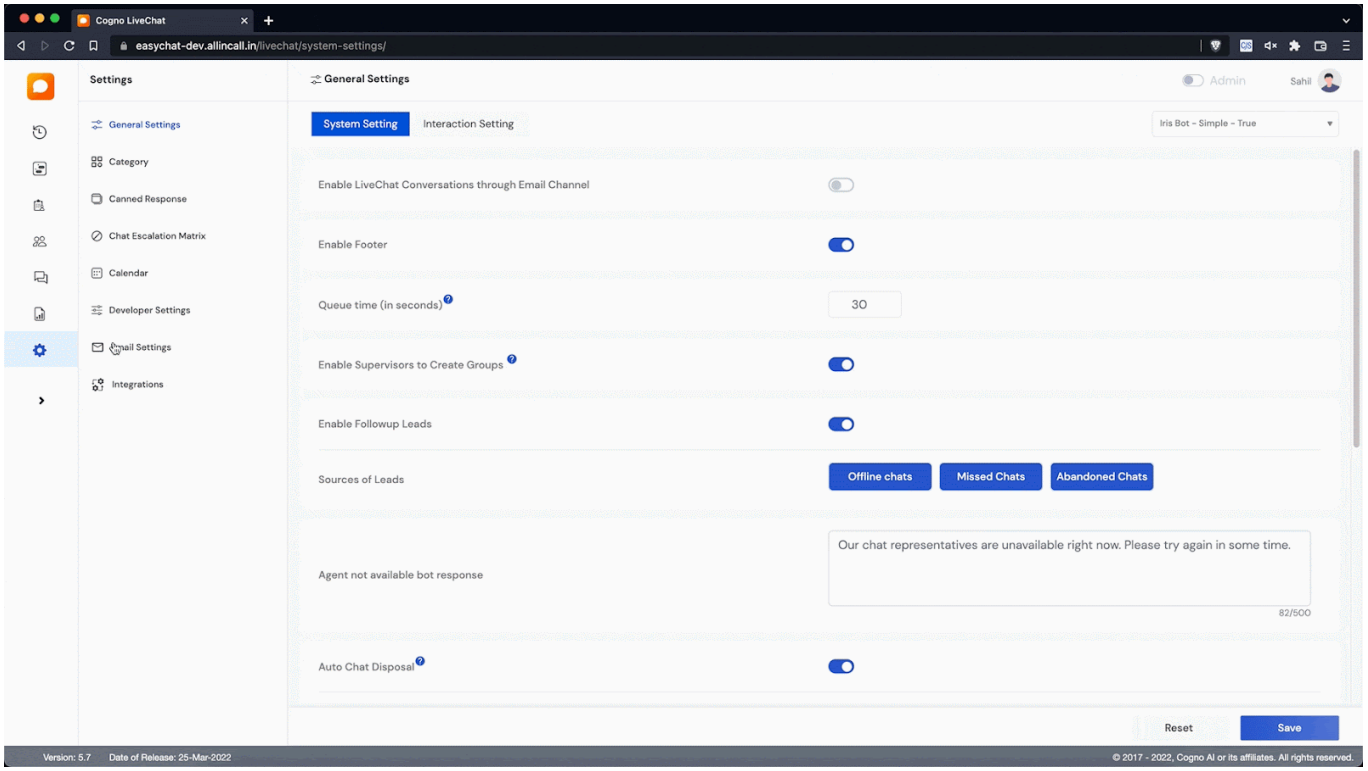
Agents initiate co-browsing sessions with users within the LiveChat. The co-browsing session will open in a new tab and the agent can continue his text conversation in the LiveChat. If an agent gets disconnected he has the option to reconnect.


Cogno LiveChat
Cogno Cobrowse
easychat-dev.allincall.in/livechat/
Inbox
Agent
Online
Sahil
Active Customers (1)
Resolve
Detected language -
English
Translate
Load more chats
Chat with an expert
05:13 PM
Your request has been registered with us. Our expert will chat with you soon.
05:13 PM
Sahil
Chat with an expert
05:14 PM
Your request has been registered with us. Our expert will chat with you soon.
05:14 PM
Customer Name: Sahil | Agent Name: Sahil Rajput(sahil.rajput@getcogno.ai)
05:15 PM
Hi
05:15 PM
Start with '/' to select a Canned Response
General Info
Sahil
sa@e.com
8989898989
Perform Actions
Send Cobrowsing Request
Raise a Ticket
View Tickets
Chat Details
Chat initiated at : 05:14 PM
Chat initiated on : 07-Feb-2022
Category : others
Assignee details
Currently assigned agent : Sahil Rajput(sahil.rajp...
Previously assigned agent : -
Version: 5.5
Date of Release: 14-Feb-2021
© 2017 - 2022, Cogno AI or its affiliates. All rights reserved.
Apply for Education Loan | HDF
hdfccredila.com/apply-for-loan.html
HDFC CREDILA
The Education Loan Specialist
Students
Parents
Education Loan Details
Apply for Education Loan
Please complete the online form below, to get edu
You can apply to HDFC Credila from anywhere in India.
You can apply before confirmed admission.
A. Student Details
First Name
Current Address
City
Email ID
Last College / University Attended
Marks Obtained in / the Last Course
Please Select
B. Course Details for Which Loan is Neede
Country of Study
Please Select
Current Status
Select Current Status
Education Loan P
Supporting Documents
Iris Bot!
Hi, I am Iris, a Virtual Assistant. I am here to help you with your most common queries. You name it and I do it. How can I help you today?
Chat with an expert
Contact Customer Care
Check ticket status
Chat with an expert
Your request has been registered with us. Our expert will chat with you soon.
Sahil Rajput has joined the chat. Please ask your queries now.
Hi
5:15 PM
End Chat
Type here...

12.1.4.5. Email Connectivity

This helps in communication between the agent and the end-user over the email channel.Agents have a separate section on their console to deal with conversations through the email channel when the setting is enabled by the admin. The agent can then communicate with customers over the email channel. The agent also has the option to continue a follow-up leads conversation via email.

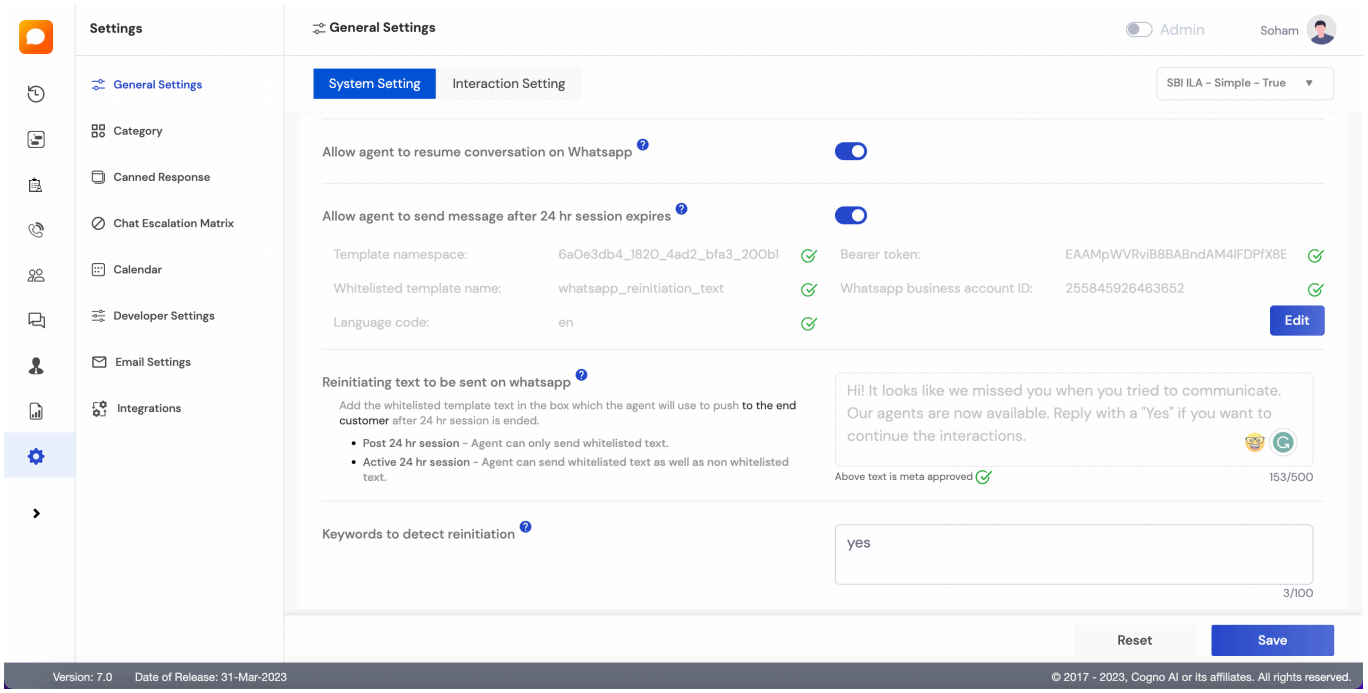
Refer to the below-shown demo for a better understanding



12.1.4.6. Follow Up Leads

A functionality is present which allows the system to capture the leads that were not able to connect with the system. An agent has to follow up with the leads assigned to them by the admin. He has to raise a ticket and/or resolve the chat for now. The agent also has the provision to mark the chat as completed so as to move it to the chat history section.

Refer to the below-shown demo for a better understanding

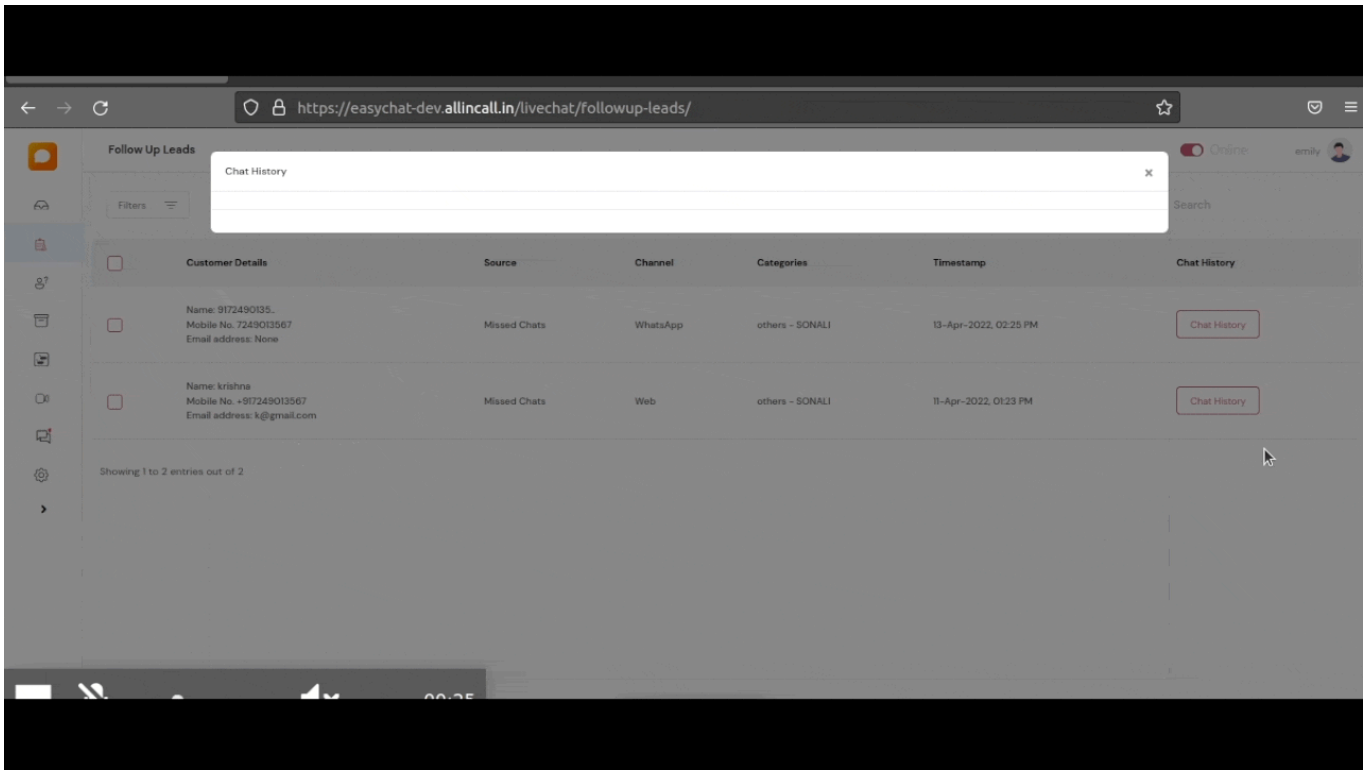


Please note : (Limitations)

1. **For MVP, no upper cap will be set to the number of follow up leads assigned to a user.**
2. **The Raise a ticket functionality only functions if it is enabled for the LiveChat. (APIs are properly configured in case of third party vendors)**
3. **Currently, leads can only be followed up by raising a ticket.**

Replying to Follow Up Leads from Whatsapp

This feature allows agents to reinitiate conversations with missed customers in follow up leads section generated for the Whatsapp channel.



Please note : (Limitations)

1. There should be a third party integration
2. Whitelisting of the reinitiation text is necessary
3. Agent that reinitiates conversation must be given priority to connect with the customer when they try to reconnect.
4. If that agent is not available, then the system will use the usual round robin method to assign to the new agent.
5. In case of no agents available, the lead will again be forwarded to the follow up leads section only and analytics will be updated with a fresh entry.
6. In the case of no agents available, the customer will again be reassigned to the original agent only in the follow up section.

For the Admin

The admin enables the agent to reinitiate follow up leads via the WhatsApp channel. He also sets the reinitiating text that has to be sent. The admin then sets the keyword that needs to be detected for reinitiation. The default keyword is “Yes”. Enabling the "Allow agent to send message after 24hr session expires" toggle will make the "Reinitiate Chat" button visible inside Follow Up Leads section even after the 24-hour session has ended. Conversely, if the toggle is disabled, the "Reinitiate Chat" button will only be visible within the 24-hour session.

For theAgent

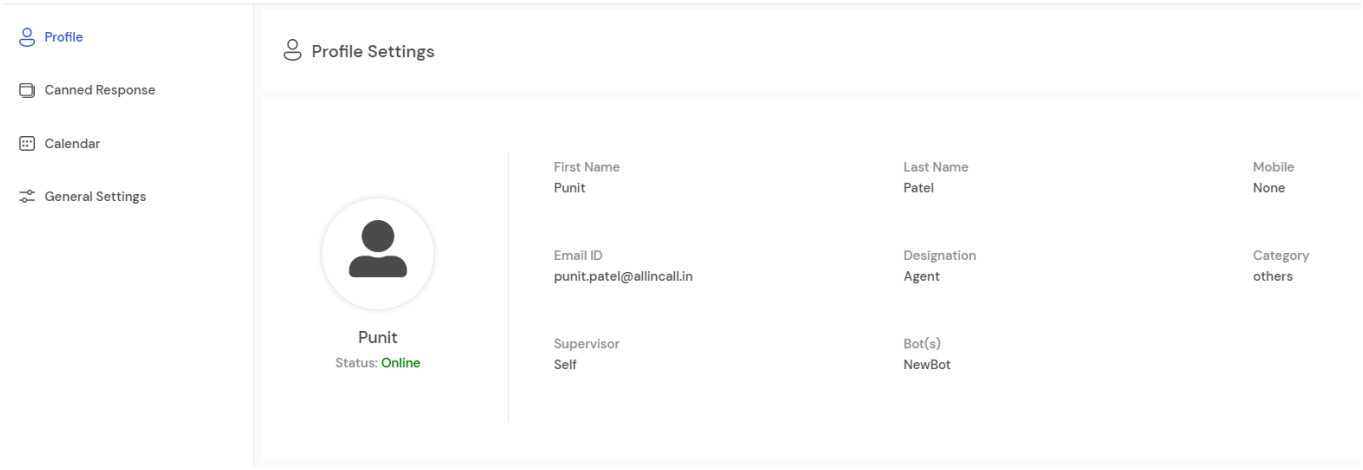
For an Agent, at the follow-up leads table, when they view the chat history, they will see an option to 'reinitiate conversation' for leads generated from the WhatsApp channel. Clicking on this button will send a message to the end customer informing them as per the text customized by the admin. Once this is done if the customer replies with the specified keyword then the chat will be initiated.Enabling the "Allow agent to send message after 24hr session expires" toggle will make the "Reinitiate Chat" button visible inside Follow Up Leads section even after the 24-hour session has ended. Conversely, if the toggle is disabled, the "Reinitiate Chat" button will only be visible within the 24-hour session.

12.1.4.7. Agent Settings

Feature Name	Definition
Settings	• Profile- Agent can view all the information provided while creating an account and who is his/her supervisor. • Calendar- Agent can view the working days and work timings • Canned response - Agent can also add canned responses which will be reflected for his/her account • General settings- Agent can enable Desktop notifications

12.1.4.7.1. Profile and General Settings

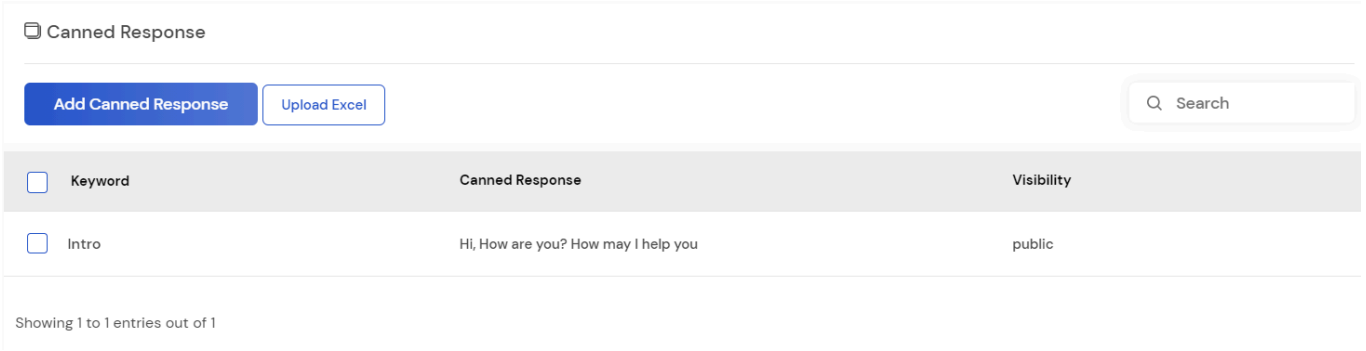
- Profile- Agent can view all the information provided while creating an account and who is his/her supervisor.



- General settings- Agent can enable Desktop notifications

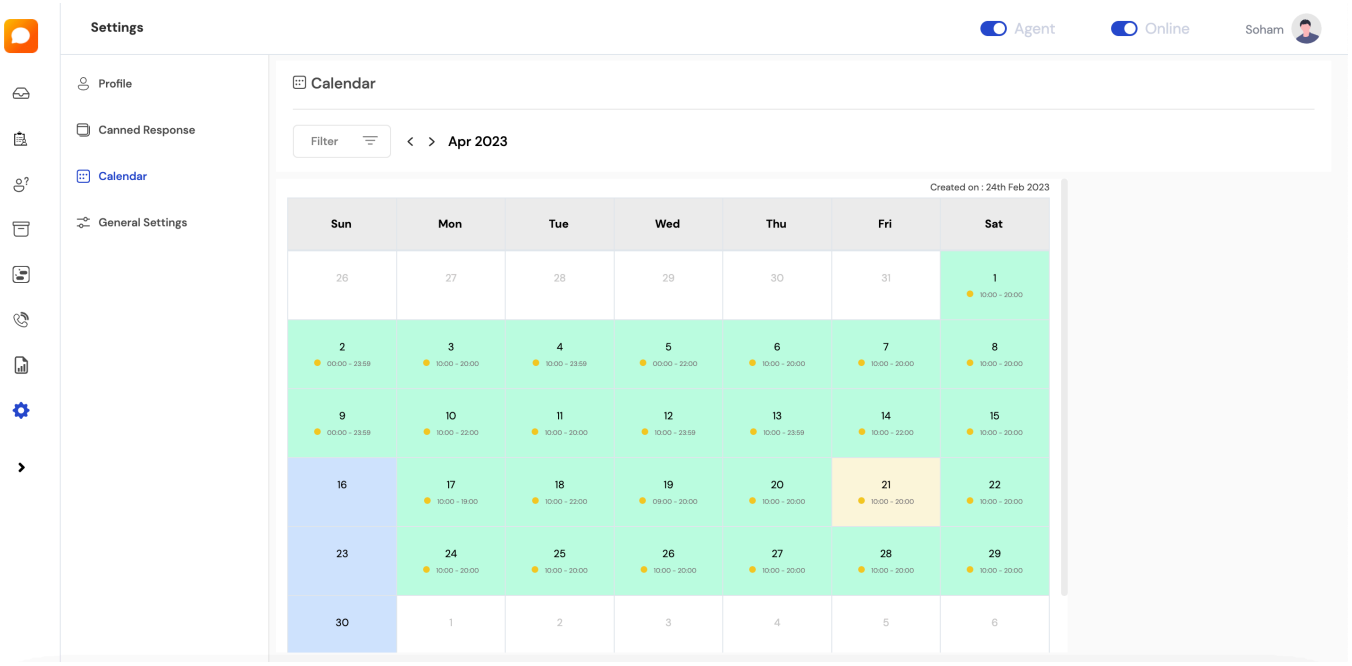
12.1.4.7.2. Canned Response

In Canned Responses, LiveChat Admin and Agents can create pre-formatted content for frequently asked questions. This helps the Agents to resolve known issues faster and reduces query resolution time.



12.1.4.7.3. Calendar

The calendar contains the list of working days and work timings.

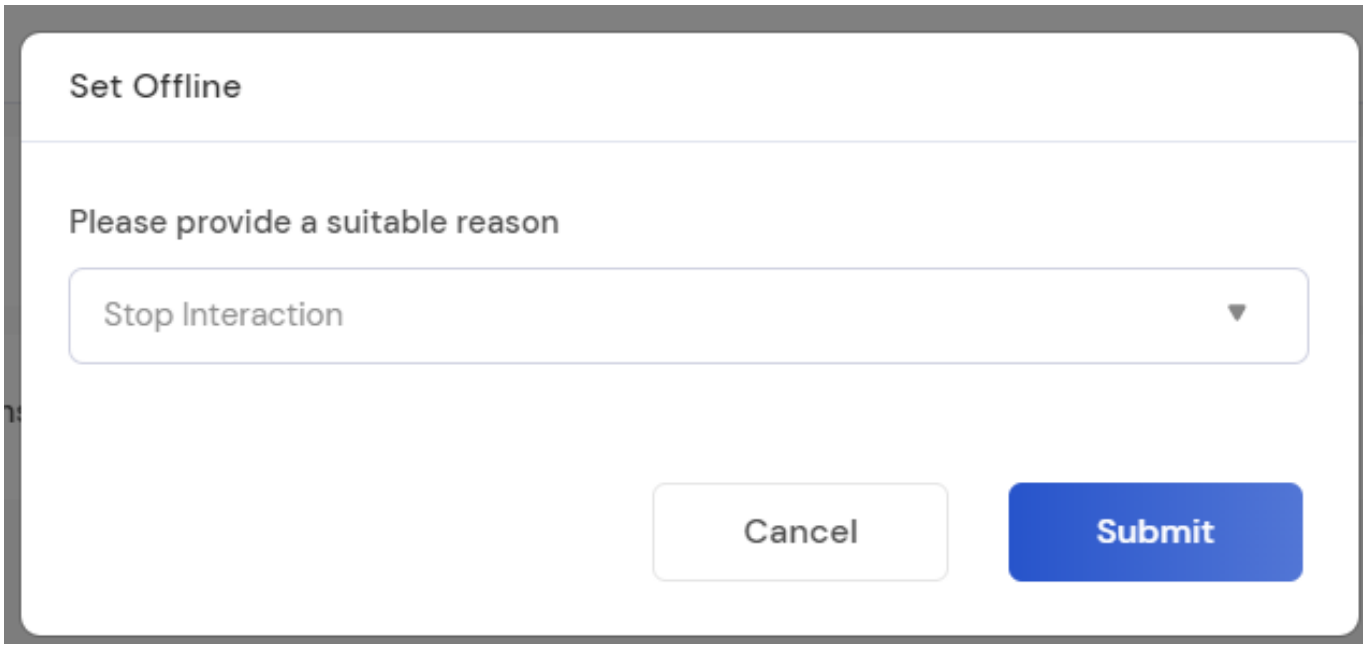


12.1.4.7.4. Additional Features

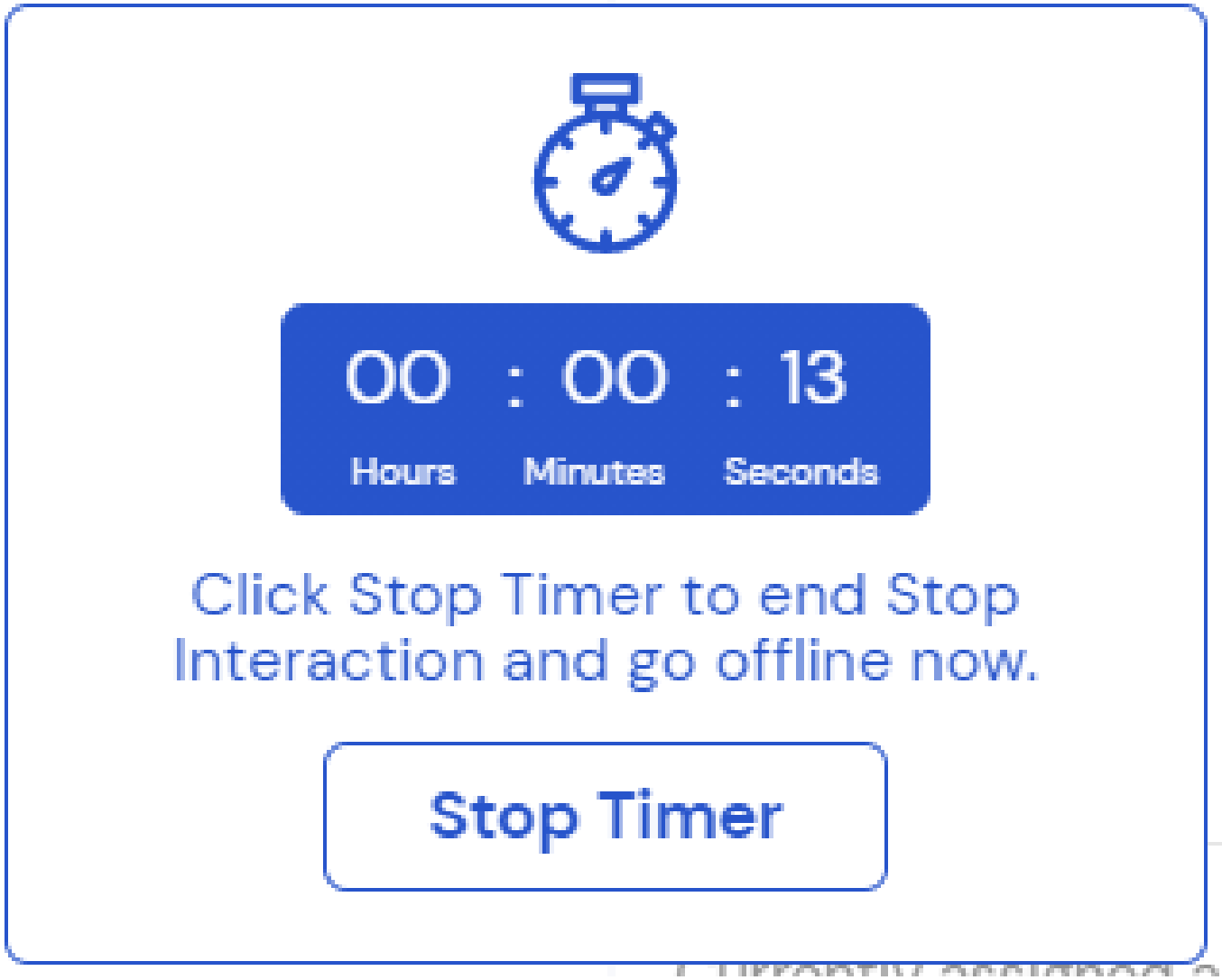
Feature Name	Definition
Online/Offline toggle	Agent can toggle online once he is ready to do conversation with customers and can toggle offline by providing a reason such as Stop interaction, Lunch, Meeting, Ad hoc,Training, coffee.
Bifurcation of Source	Lead is active from which source (smartphone or desktop) will be visible to the agent in the customer detail section.
Invite agent for group chat with a customer	Agents will have an option to invite another agent while interacting with the end user to solve the customer queries.
Multiple agent invite in an ongoing chat with a customer	LiveChat admin can configure the number of agents that can be added in a single chat.
Voice to text	Mic option is enabled for Agent

Online/Offline toggle

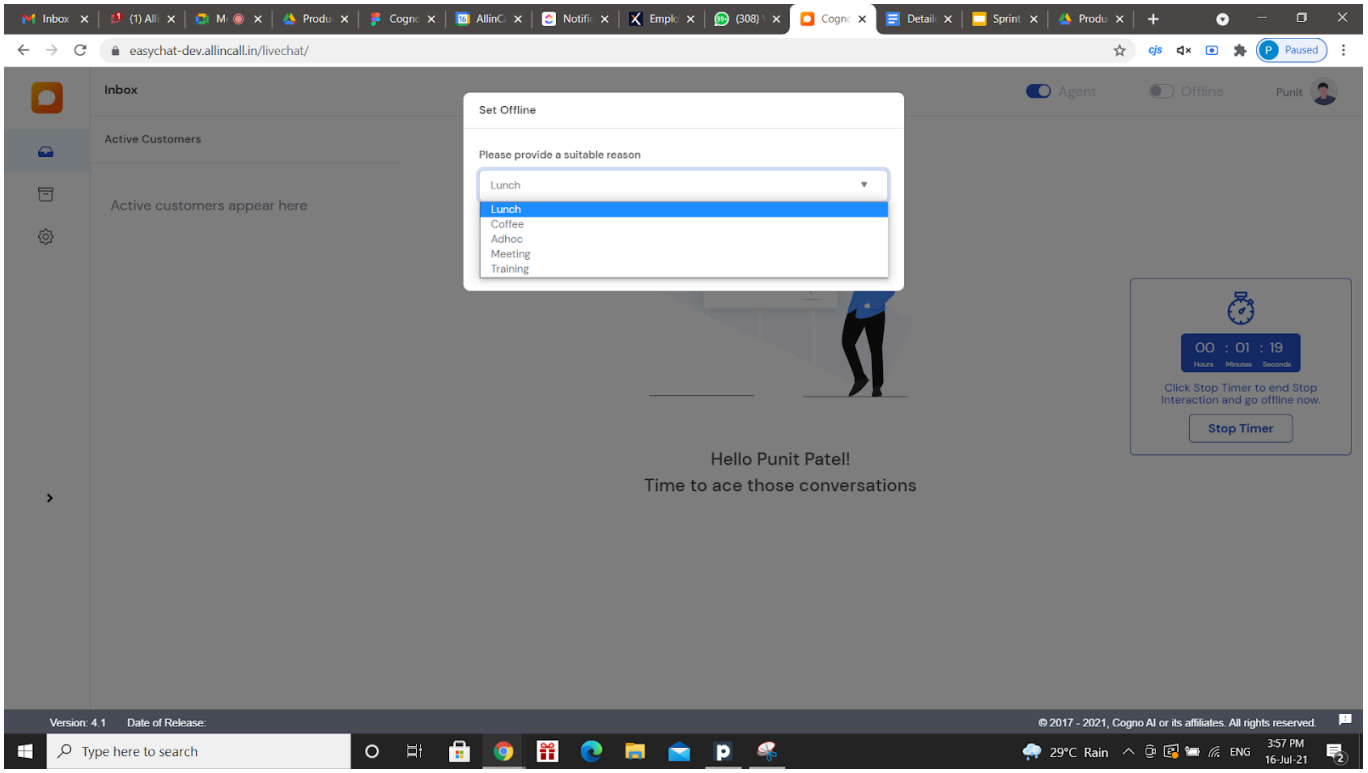
Agent can toggle online once he is ready to do conversation with customers and can toggle offline by providing a reason such as Stop interaction if the number of chats assigned to the agent is greater than zero.



Once the agent marks himself/herself as offline by selecting Stop interaction as a reason a stop timer will be visible which could be stopped once the agent disposes of all the chats.

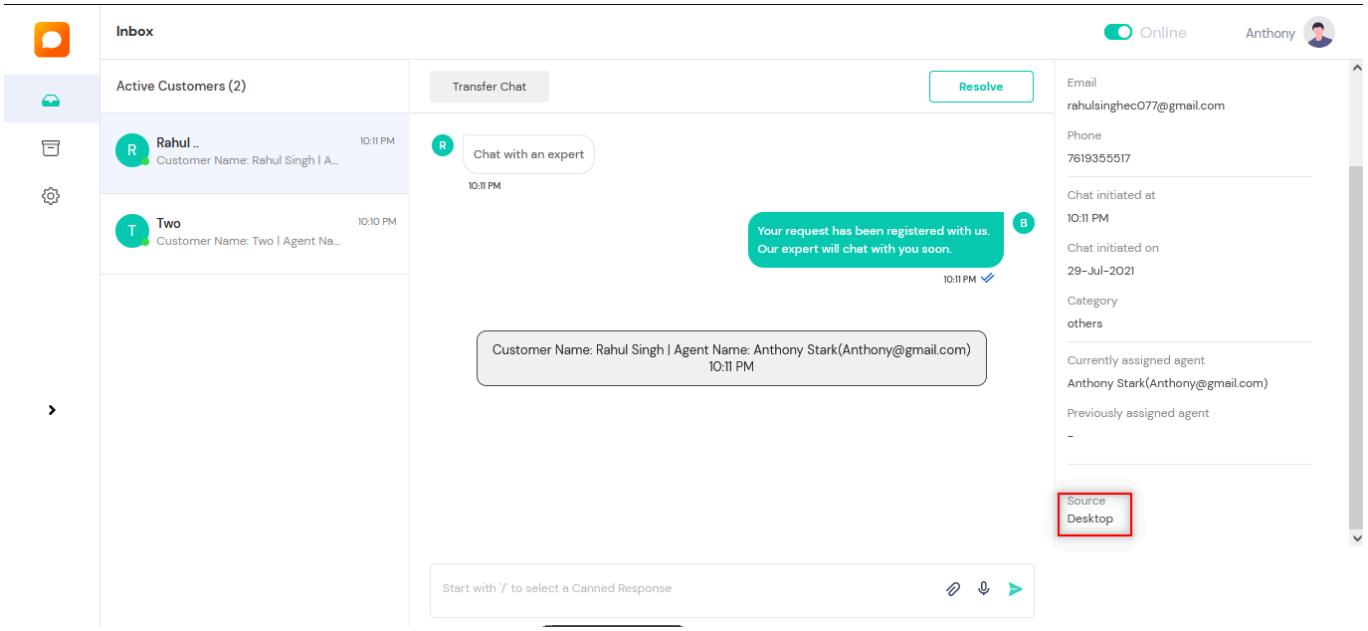


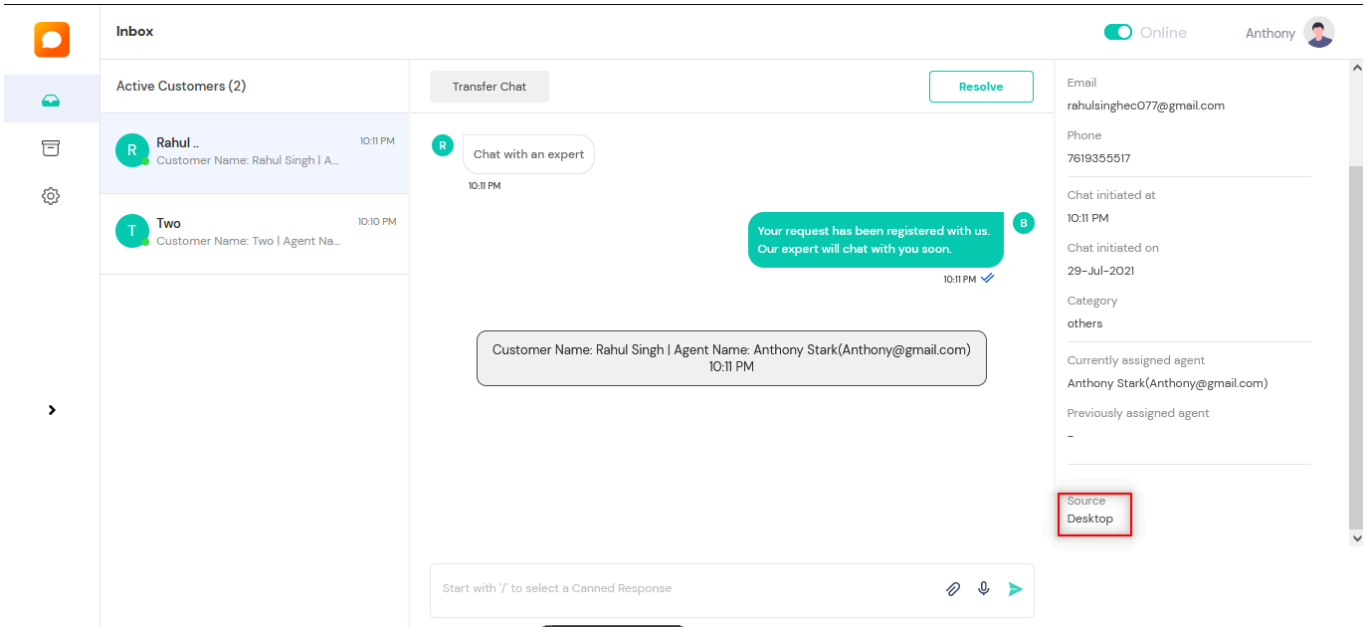
If the number of chats assigned to the agent is zero then the agent can mark himself offline by providing options such as Lunch, Meeting, Ad Hoc, Coffee directly.

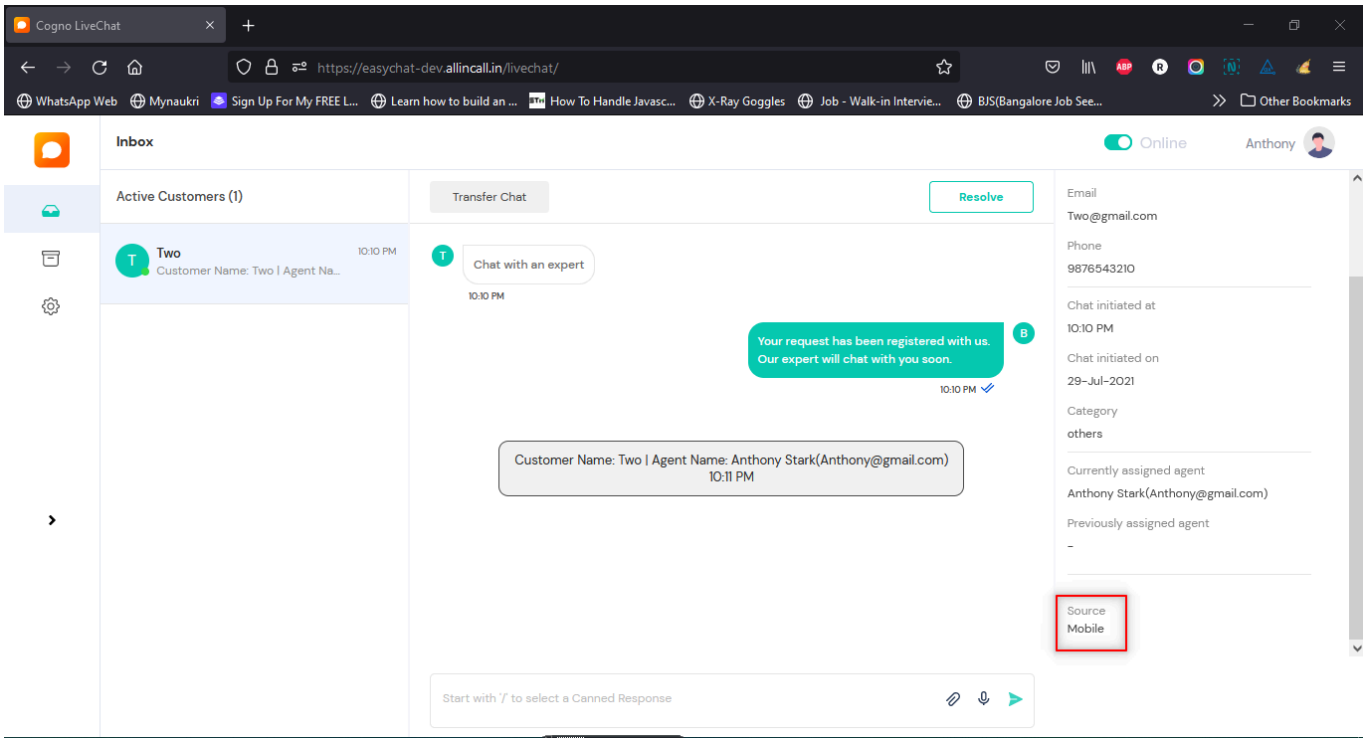


Bifurcation of Source

Lead is active from which source (smartphone or desktop) will be visible to the agent with this update.


Inbox
Online
Anthony
Active Customers (2)
Transfer Chat
Resolve
Rahul ..
10:11 PM
Customer Name: Rahul Singh | A...
Two
10:10 PM
Customer Name: Two | Agent Na...
Chat with an expert
10:11 PM
Your request has been registered with us. Our expert will chat with you soon.
10:11 PM
Customer Name: Rahul Singh | Agent Name: Anthony Stark(Anthony@gmail.com)
10:11 PM
Email
rahulsinghec077@gmail.com
Phone
7619355517
Chat initiated at
10:11 PM
Chat initiated on
29-Jul-2021
Category
others
Currently assigned agent
Anthony Stark(Anthony@gmail.com)
Previously assigned agent
-
Source
Desktop
Start with '/' to select a Canned Response

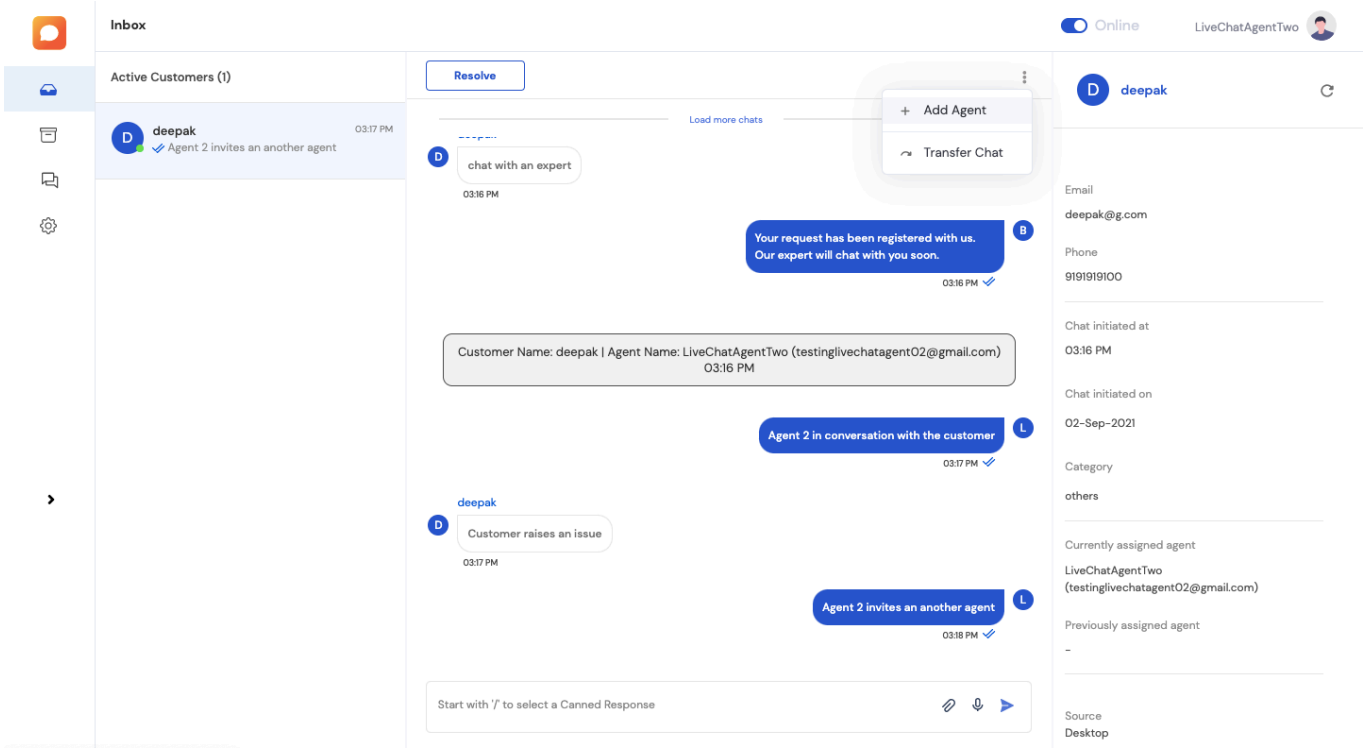

Inbox
Online
Anthony
Active Customers (2)
Transfer Chat
Resolve
Rahul ..
10:11 PM
Customer Name: Rahul Singh | A...
Two
10:10 PM
Customer Name: Two | Agent Na...
Chat with an expert
10:11 PM
Your request has been registered with us. Our expert will chat with you soon.
10:11 PM
Customer Name: Rahul Singh | Agent Name: Anthony Stark(Anthony@gmail.com)
10:11 PM
Email
rahulsinghec077@gmail.com
Phone
7619355517
Chat initiated at
10:11 PM
Chat initiated on
29-Jul-2021
Category
others
Currently assigned agent
Anthony Stark(Anthony@gmail.com)
Previously assigned agent
-
Source
Desktop
Start with '/' to select a Canned Response



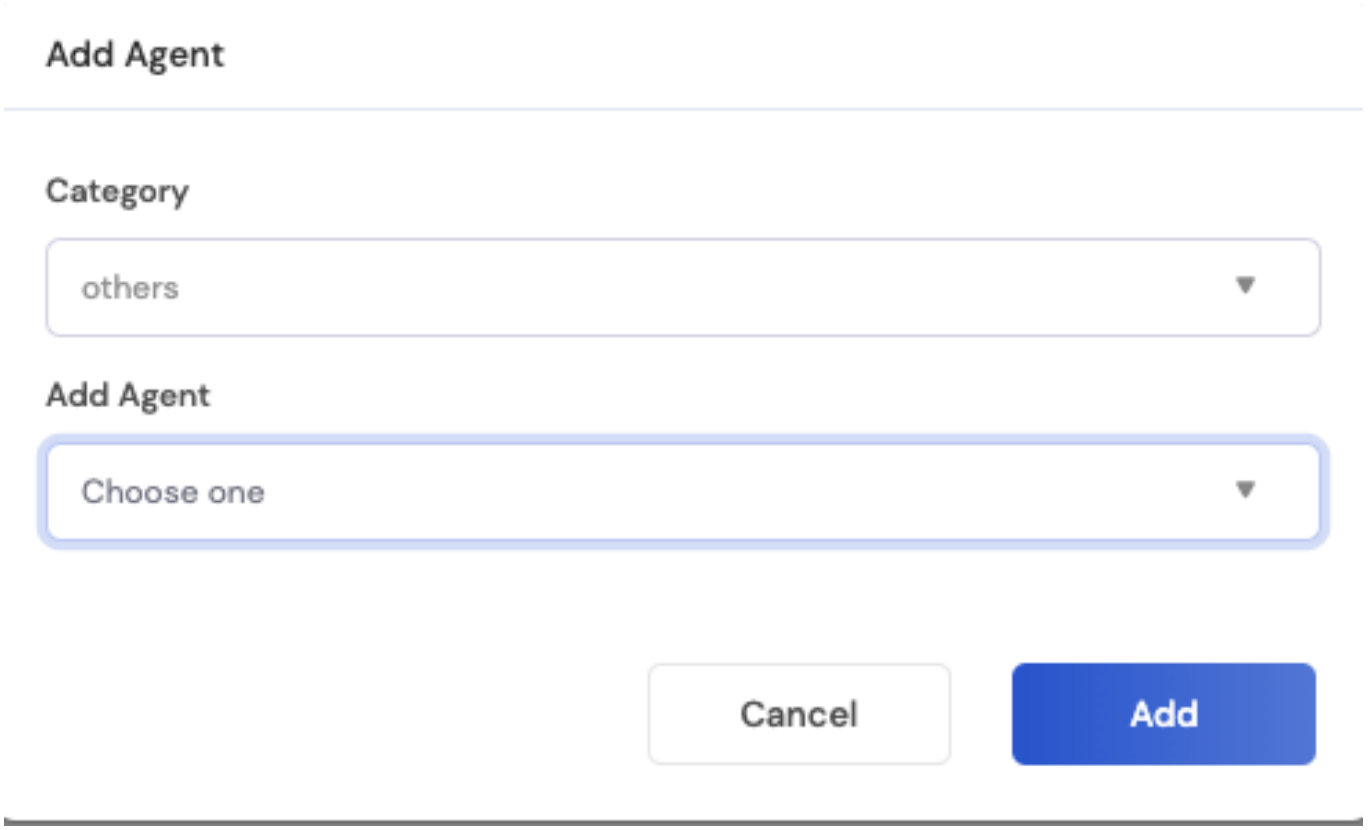
Invite agent for group chat with a customer

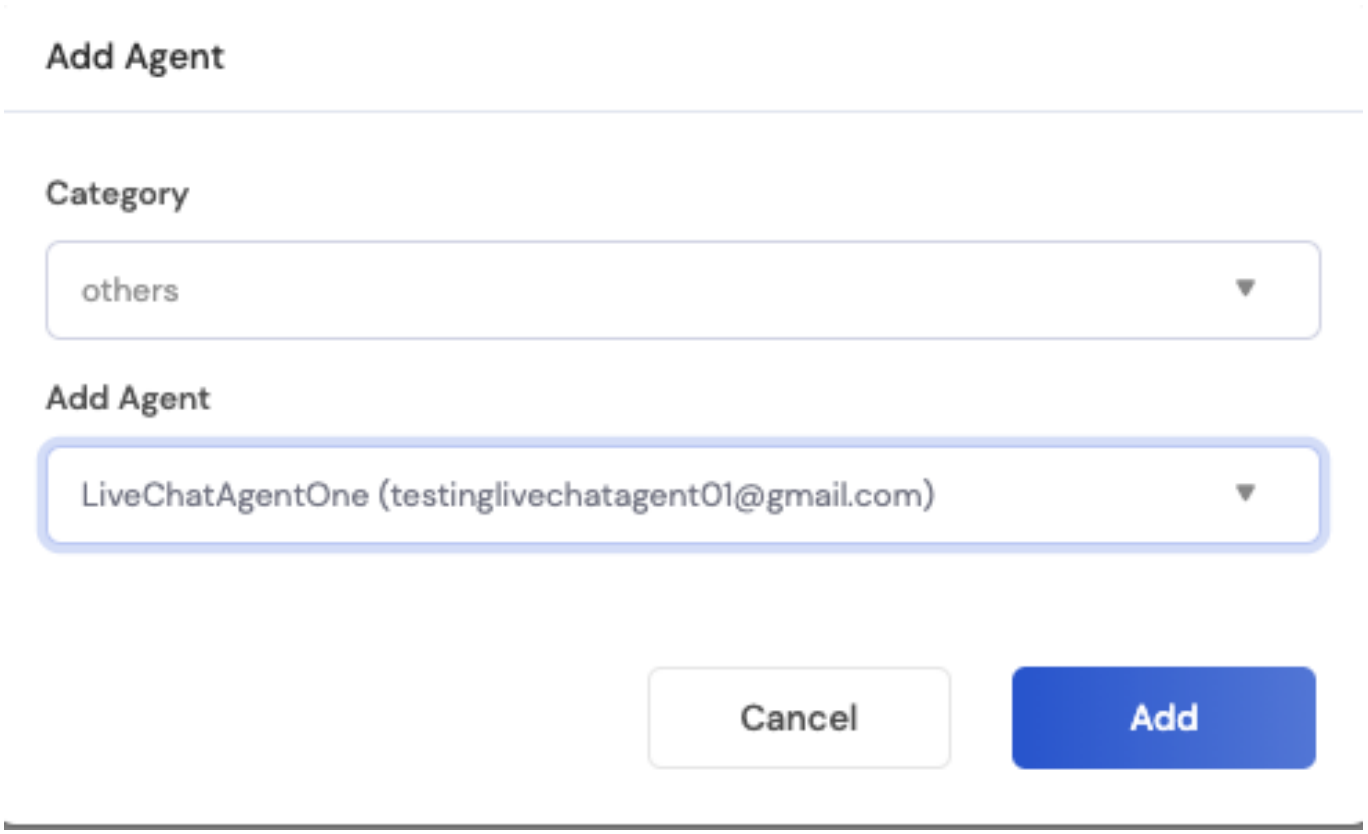
Agents will have an option to invite another agent while interacting with the end user to solve the customer queries. Steps to initiate:

- The agent who wants to invite another agent, can click on the triple dots on the top-right corner and select the option of '+ Add agent'

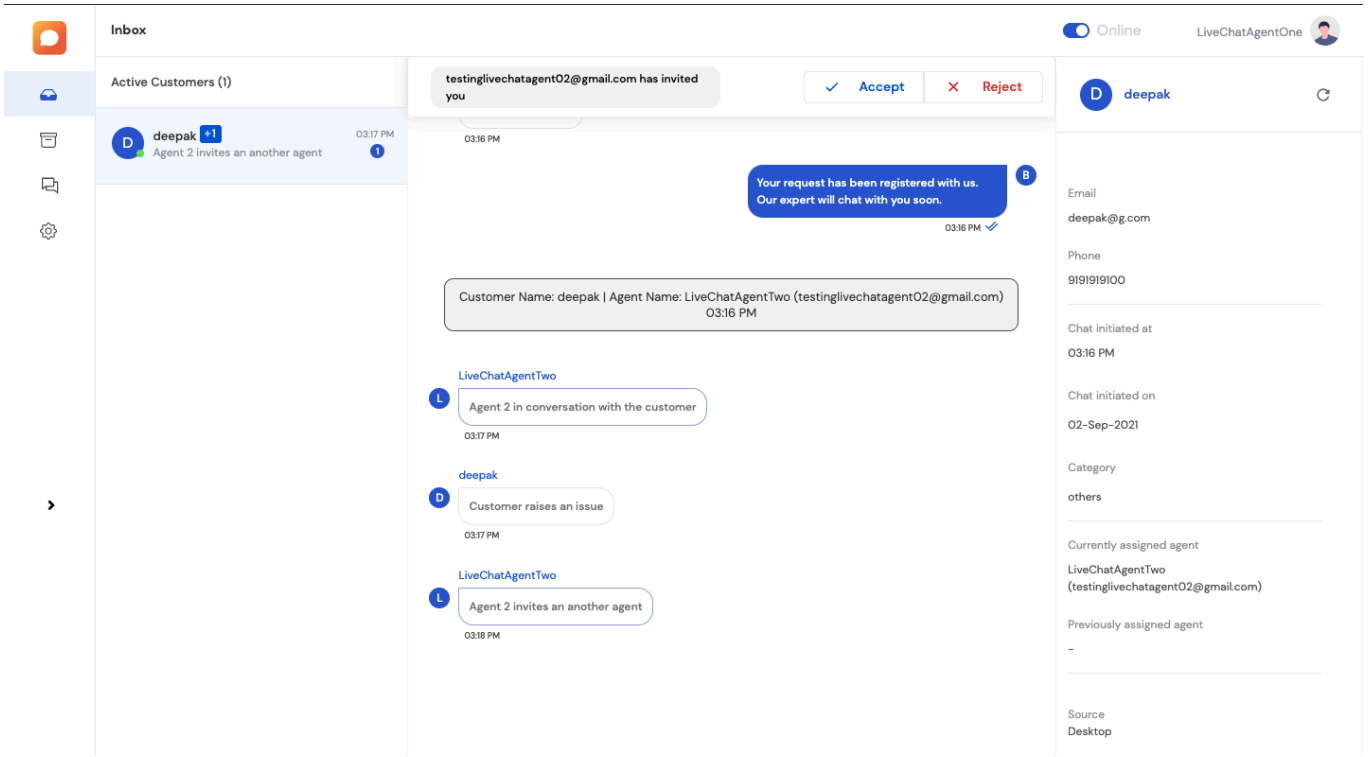


- A modal will appear from which the agent can search from the list of available agents who can be invited to the ongoing chat.

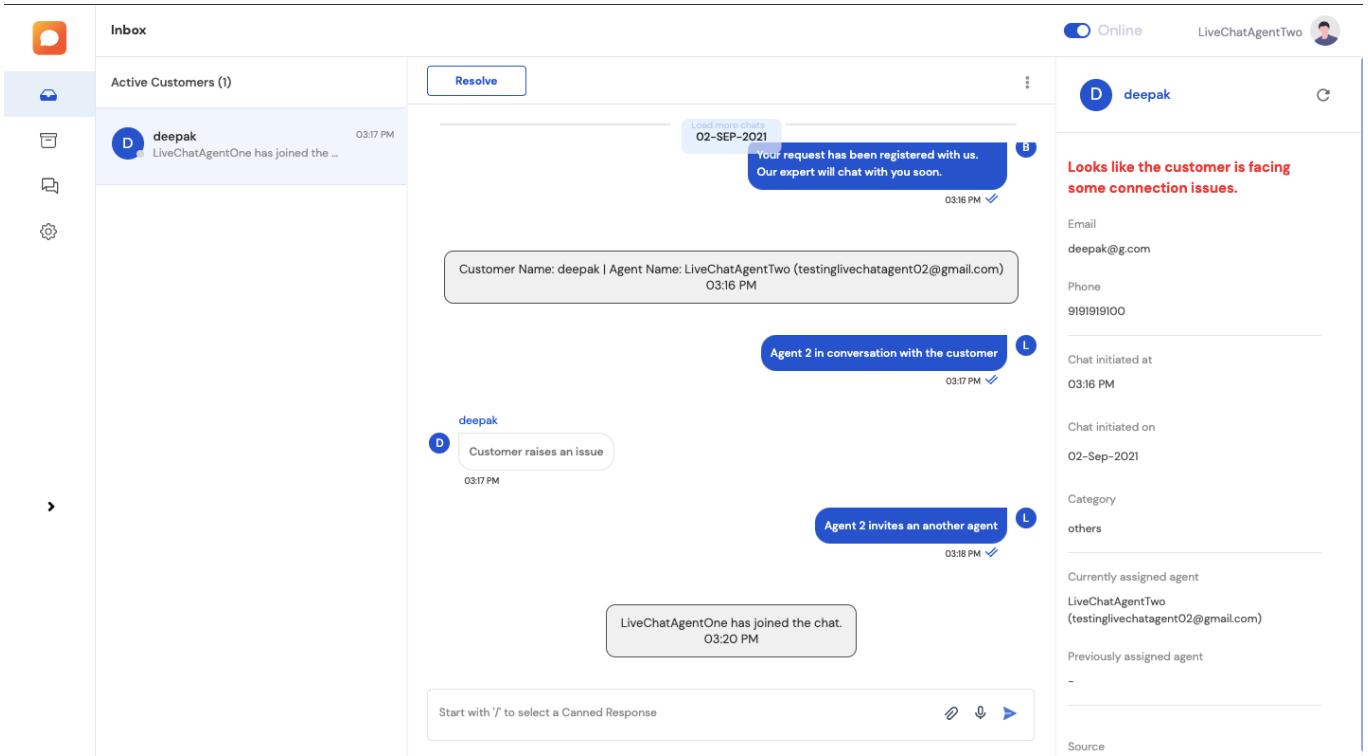




- The system will send the invite to Agent 2, and they can either **Accept** or **Reject** it.

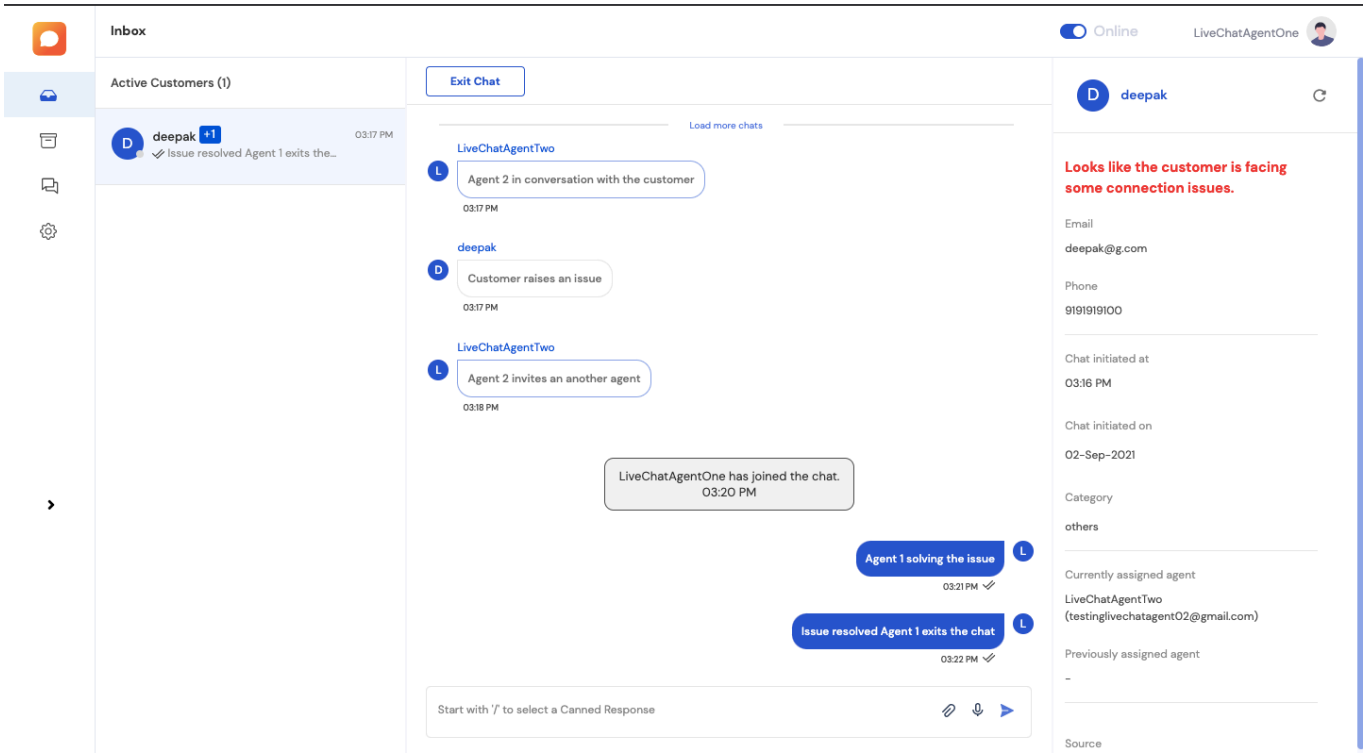


Note : This request will appear with the name of the customer along with a '+1' indicator representing the presence of another agent in the chat. Agent 2 will be able to see the chat history of the user with Agent 1.On the right side of the screen the details of the end user will be visible



If the Agent Accepts the Invite, the conversation will add up on their screen. They can now send messages to this conversation.

Note : Agent 2 can leave the chat by clicking on 'Exit Chat'. They will not have the option to transfer the chat.



The messages sent from Agent 2 will be distinguished with their name and blue highlight on their chat bubbles.

- If Agent 2 Rejects the chat, it gets reflected on the conversation but only for the agents and not the users.

Note : Agent 1 will be notified about Agent 2's unavailability.Please refer to the demo available below for better understanding

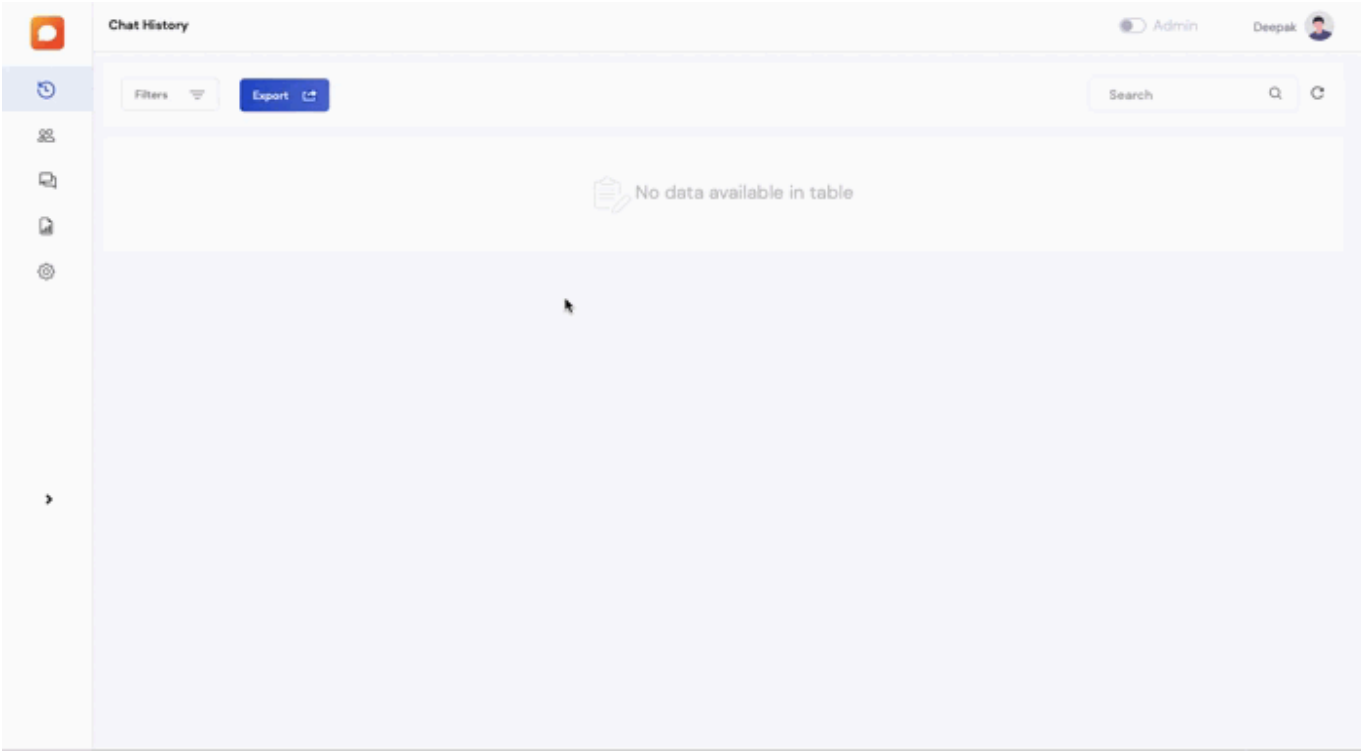
Multiple Agent in an Ongoing Chat

LiveChat admin can configure the number of agents that can be added in a single chat.

This is visible unders LiveChat > Settings > General Settings > Maximum Number of Agents that can be invited in single chat

Refer the below shown demo for better understanding

Admin side (configuration)



An agent can invite the number of agents set by the LiveChat admin in a chat by selecting the agent names from the dropdown. A request will be sent to the selected agents on clicking ADD. Note : After the agent selects the "Maximum number of agents that can be added in a single chat" the other checkboxes will disable.

In case an agent goes offline or the capacity of the selected agent reaches maximum capacity then a toast with the text "<agent names> is/are not available" will be displayed and the request will be sent to the agent who is available.

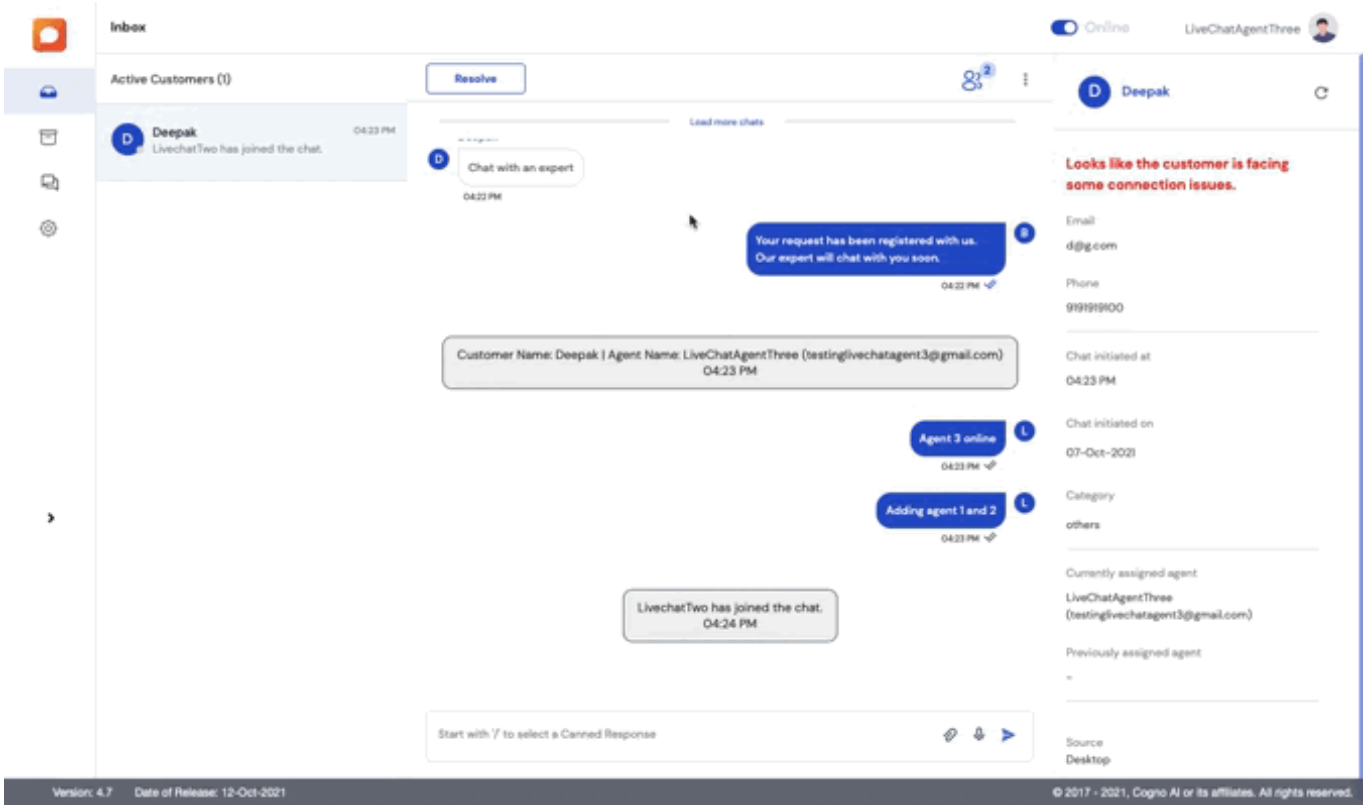
Once the request is sent to all the selected available agents an icon will be displayed beside the triple-dot with a counter on it. The agent receiving the request will have an option to accept/reject the request within the time set by the LiveChat admin from the console.

Agent side (invitation)

The counter on it displays the number of agents to whom the request is sent and clicking on that icon a modal will popup with the real-time Pending/Accept/Reject/No (Accept/Reject) activity/Exit Chat the latest status.Note : Only after the timer drains to 0, the primary agent can invite more agents in the chat.

No accept/reject activity - If Agent does not accept and the timer drains to 0.

A notification of another agent joining/leaving the chat will be displayed in the chat section, chat history, ongoing chat(viewed by admin/supervisor), archive chat.



In the Performance report, a column "No Accept/Reject Group Chat" is added. The number of times an individual agent has not responded to the accept or reject of the request will be registered in that column.

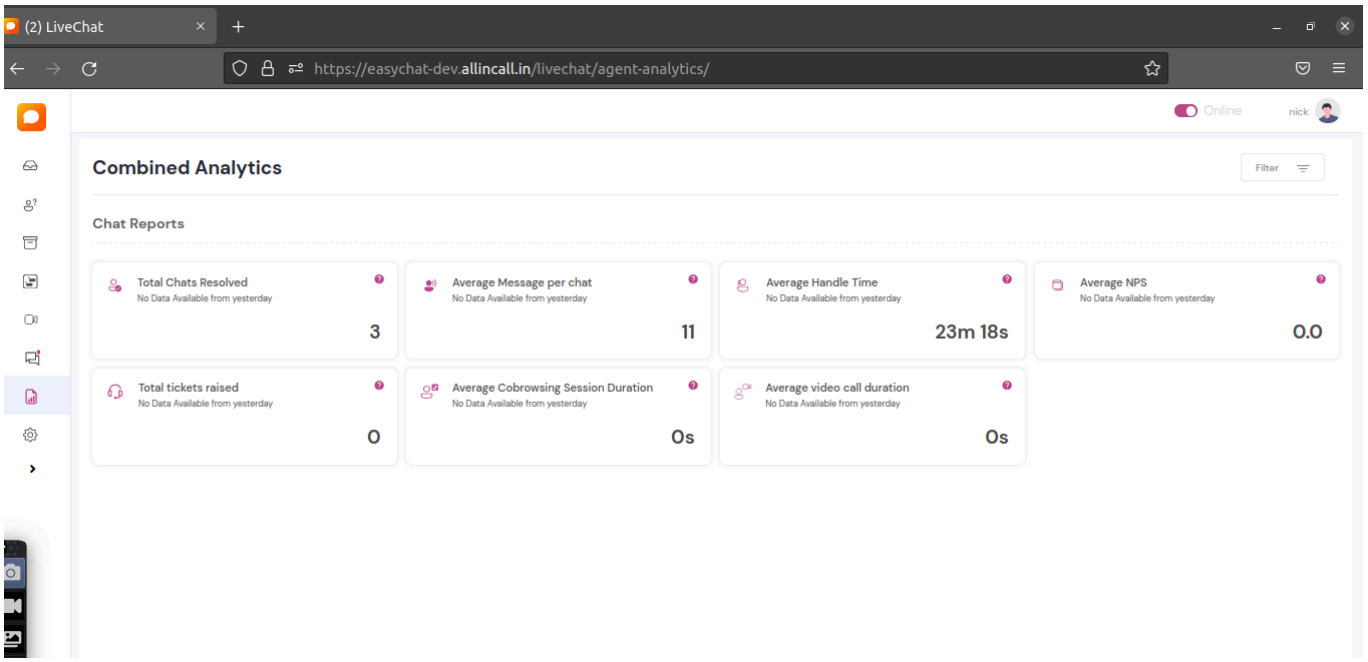
"No Accept/Reject Group Chat" added in excel

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Agent Nan	Login Date	Logout Da	Login Dura	AHT	Not Ready	Not Ready	Interaction	Total Intera	Transferre	Transferre	Total Grou	Accepted	Declined Gro	No Accept/Reject Group Chats	Total Group Chat Duration	
Agenttwo A	15/09/202	15/09/202	53m 12s	15m 0s	1	32s	3	30m 0s	0	0	2	1	0	1	0s	
Agentone A	15/09/202	15/09/202	4h 53m 56	11m 40s	1	1m 58s	2	11m 40s	0	0	1	1	1	0	3m 1s	
Agenttwo A	15/09/202	15/09/202	4m 57s	0s	0	0s	2	0s	0	0	0	2	0	1	3m 31s	
Agentone A	15/09/202	15/09/202	45m 33s	13m 15s	0	0s	1	13m 15s	0	0	3	0	0	0	0s	
Agentone A	15/09/202	15/09/202	43s	0s	0	0s	0	0s	0	0	0	0	0	1	0s	
Agenttwo A	15/09/202	15/09/202	20m 7s	0s	0	0s	2	0s	0	0	0	2	1	0	31s	
Agentone A	15/09/202	15/09/202	9m 47s	10m 6s	0	0s	1	10m 6s	0	0	3	0	0	1	0s	

Note : Minimum timing set to 15 on admin side in "Pending time for accept/reject while an agent invites another agent in the chat(In seconds)"

12.1.4.7.5. Reports

For the Agent This is visible under LiveChat (Agents Console) > Reports > Combined Analytics



The information that would be showcased to the agents will help them analyze their performance and accordingly work on it.The new report section for agents will showcase the following widgets w.r.t to the interactions they will undergo:

- Total Chats Resolved
- Average Messages per chat
- Average Handle Time
- Average NPS
- Follow Up Leads
- Total Tickets Raised
- Average Call Duration
- Average Cobrowsing Session Duration
- Average Video Call Duration

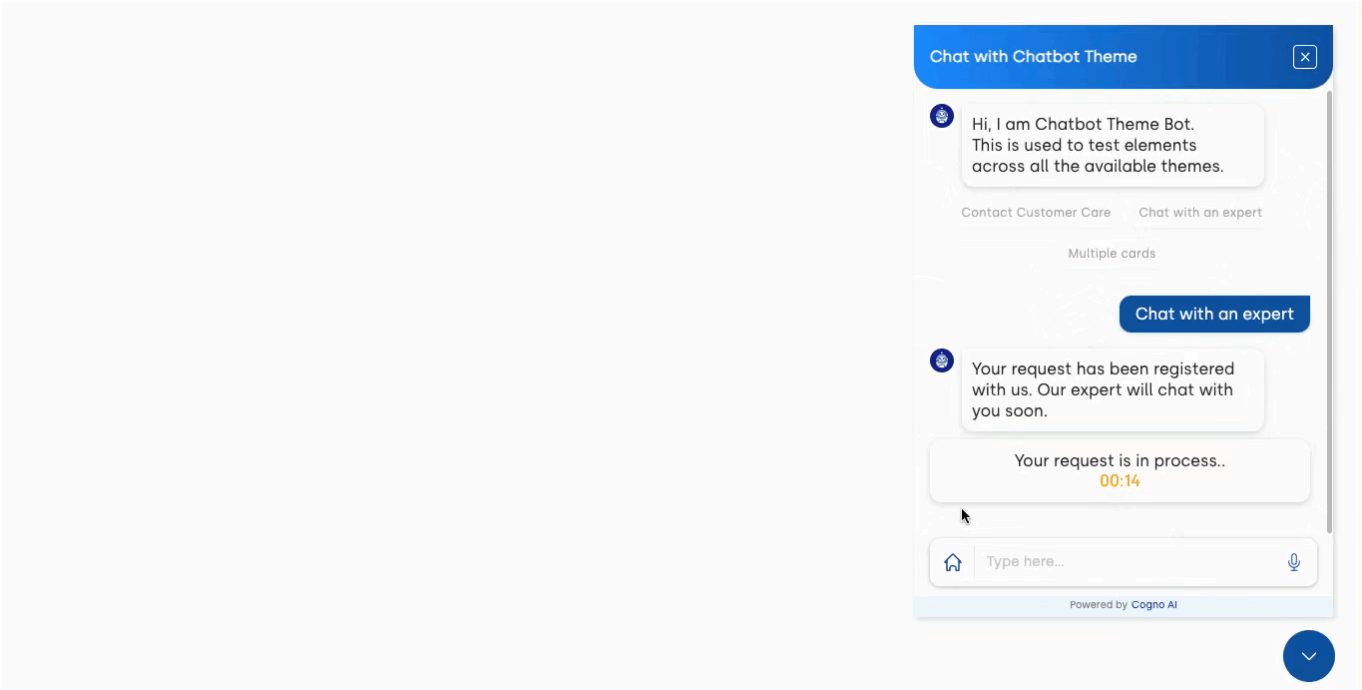
Please note : (Limitations) For agents, follow up leads, Total tickets raised, Average call duration, Average co-browsing session duration, and Average Video call duration widgets will only be showcased, if those functionalities are enabled by the admin.

12.1.5. For the end-users

Chat Transcript to the customer

Customers will have an option to email the chat transcript on their email id.**For the Users:** Users will have an option in the bot as shown below to request for the chat transcript, clicking on which the transcript will be sent to the users over the email id provided while initiating the LiveChat session.

Refer to the working of the feature below:



Same Day Reports

Providing an option for the clients to download the reports in real-time.

This is applicable for the following reports in the LiveChat Console

Chat history	Video Call History	Offline Chats
Performance Reports	Daily Interaction	Abandoned Chats
Hourly Interaction	Cobrowsing Session History	Login-Logout
Chat Transcript	Agent Not Ready	
Voice Call History	Missed Chats	

Example: All the NPS that the end-users have given for the bot today (dd-mm-yyyy) and if we try to download it around 4:00 PM all the data till 4:00 PM will be downloaded.For cases such as **Export > Today, Last Day, Last 7 Days, and Last Month** chat history reports will get downloaded immediately. For the custom date range, it will contain an empty excel file if no data is present for specific datesIn chat history reports if data is not present for a specific date then the zip file will not contain any excel sheet for that particular date. This is applicable for the Today, Last Day, Last 7 Days, and Last Month date ranges except for the Custom date range. **Providing NPS**If NPS has been enabled by the admin, then on web, android and IOS the customer will be prompted with an NPS Modal where he/she needs to provide ratings between 0-10 and optionally add comments (if any).



For Whatsapp and all other channels the typical NPS flow looks like below:



Please Note: After customer gets to see the first NPS prompt he must either enter any value from 0-10 or write "skip". If he types anything else the feedback prompt will be displayed on loop. Once he has provided NPS rating, he can add any comment or write "skip" to skip adding comments.The Provided NPS will be visible inside Admin and Supervisor Chat History under "Chat Ratings" column and inside Agent Archives as well.



This data is exportable along with Chat History Export.

12.2. CoBrowsing

12.2.1. About CoBrowsing

CoBrowsing is a real-time support solution that enables agents to securely view and assist customers as they navigate a website, web form, or online application.

Instead of relying on lengthy explanations or back-and-forth instructions on phone calls or meetings, CoBrowsing allows agents to **see the user's screen, exactly what the customer sees,** and guide them step by step, improving resolution time and customer experience.

CoBrowsing also automates the process of assigning customers to the Agents. Thus, your customers need not wait every time they need any help.

Unlike screen sharing, CoBrowsing only shares the active browser tab or web page, ensuring **customer privacy and data security**.

Typical use cases include:

- Assisting customers with filling out online forms.
- Guiding users through complex checkout processes.
- Troubleshooting errors that occur on specific web pages.
- Providing real-time onboarding or training for web applications.

Key Features

- **Real-Time Collaboration**: Agents can instantly see what the customer sees and provide hands-on guidance.
- **Secure Data Masking**: Sensitive information (like passwords or credit card numbers) is hidden from the agent's view.
- **Role-Based Access**: Admins, Supervisors, and Agents have clearly defined roles and permissions.
- **Automatic Session Assignment**: Customers are automatically routed to available agents, reducing waiting time.
- **Reporting & Insights**: Admins and Supervisors can export reports to track usage, performance, and resolution metrics.

How CoBrowsing Works

1. **Customer Request**: A customer on your website clicks the *“Get Help”* or *“Start CoBrowsing”* button.
2. **Session Initiation**: A secure CoBrowsing session is established between the customer’s browser and the support platform.
3. **Agent Assignment**: The system automatically routes the session to an available Agent.
4. **Live Assistance**: The Agent views the customer’s browser screen in real-time and can guide them step by step.
5. **Session End**: Once the query is resolved, the customer or agent can end the session.

12.2.2. User Roles in CoBrowsing

User Roles in CoBrowsing

CoBrowsing supports three main roles:

- **Admin:**
  - Sets up the CoBrowsing system for the organization.
  - Creates and manages Supervisors and Agents.
  - Monitors platform usage and ensures smooth operation.
  - Can export detailed reports for compliance and analysis.

- **Supervisor**
  - Manages Agents within their team.
  - Monitors ongoing CoBrowsing sessions.
  - Ensures quality of support interactions.
  - Can also export reports for their team's performance.

- **Agent**
  - Engages directly with customers.
  - Provides real-time guidance during browsing sessions.
  - Assists with filling out forms, navigating the website, or troubleshooting errors.

12.2.3. Types of CoBrowsing

Types of CoBrowsing & How It Works

CoBrowsing sessions can be initiated in multiple ways depending on the support scenario. Each method is designed to offer flexibility in how customers and agents connect, ensuring smooth and secure collaboration.

Inbound CoBrowsing Approach

In this model, the **customer initiates the request for help**.

How It Works

1. A customer visiting your website clicks the **“Request Support”** or **“Start CoBrowsing”** button.
2. The customer fills out the required information (such as name, email, or query type).
3. The system automatically routes the request to an available Agent.
4. The Agent joins the session and assists the customer in real time.

Best suited for: Websites with high customer traffic, form submissions, or self-service portals.

Outbound CoBrowsing Approach

Here, the **agent initiates the CoBrowsing session** by creating or locating the customer link.

How It Works

Outbound CoBrowsing has two modes:

Generate Drop Link

- The Agent enters the customer’s details and the relevant website URL in the CoBrowsing console.
- On clicking **Generate Link**, a unique session link is created.
- The Agent shares this link with the customer (via chat, SMS, or email).
- Once the customer clicks and opens the link, the CoBrowsing session begins.

- **Best suited for**: Proactive support, sales demos, or onboarding customers to a platform.

Search Lead

- The Agent uses the **Search Lead** functionality to find an existing customer (fields can be configured as per business needs, such as phone number or email ID).
- Once identified, the Agent can initiate a CoBrowsing session directly with the customer.

Best suited for: Existing leads/customers with stored profiles where direct mapping is possible.

Reverse CoBrowsing Approach

In Reverse CoBrowsing, the **agent initiates the session from the client website** itself.

How It Works

1. The Agent visits the client's website.
2. They enter the customer details along with their **Agent Code** in the provided interface.
3. On clicking **Generate Link**, a secure session link is created.
4. The link is sent to the customer, who can join the CoBrowsing session.
5. In this approach, **the agent fills the form on behalf of the customer**, reducing customer effort.

Email Sharing in Reverse CoBrowsing

An additional configuration allows Agents to send the session link **directly via email**.

- Inside the **Generate Support Link** modal, Agents can enter the customer's email address.
- Email validation ensures the entered ID is valid.
- If valid, the customer immediately receives an **email invitation** with the link.
- If no email is entered, the link is generated and displayed in the modal (as in standard Reverse CoBrowsing).

Best suited for: Remote support where customers may prefer receiving links via email instead of waiting on the website.

Summary of Approaches

Approach	Who Initiates	How It Works	Best Use Case
Inbound	Customer	Customer clicks “Request Support” → fills info → auto-assigned to Agent	High-traffic sites, customer-first interactions
Outbound (Drop Link)	Agent	The agent generates a session link and shares it with the customer.	Proactive support, demos, and guided onboarding
Outbound (Search Lead)	Agent	Agent searches lead details → initiates session	Existing customers with stored profiles
Reverse CoBrowsing	Agent	Agent generates a link from the client site (fills the form on behalf of the customer)	Hands-on support, minimizing customer input
Reverse CoBrowsing + Email	Agent	The agent generates a link and sends it via email invitation	Remote support, when customers prefer a link over email
Low Bandwidth Mode	System/Agent	Switch to Lite Mode automatically or manually when speed is low	Customers with poor/unstable internet connections

12.2.3.1. Inbound Cobrowsing

What is Inbound CoBrowsing

Inbound CoBrowsing is a **customer-initiated support approach** where the customer requests real-time assistance while browsing your website or application. This model ensures customers can quickly connect with a live agent whenever they face difficulties, without needing external links or pre-arrangements.

It is the most **customer-friendly** approach because the customer controls when the session starts, and agents simply receive the incoming request.



Prerequisites

Before using Inbound CoBrowsing, ensure the following:

- **Website Integration**:
  The CoBrowsing widget (Request for Support button + form) must be integrated into your website.

- **Agent Console Access**:
  Agents must have valid logins and access to the CoBrowsing dashboard.
- **Routing Configurations**:
  Customer requests must be mapped to available agents using routing rules.
- **Support Code System**:
  The CoBrowsing setup must support secure **support code generation and validation**.
- **Browser Support**:
  Ensure customers use supported browsers (latest versions of Chrome, Firefox, Safari, or Edge).
- **Customer Consent**:
  Customers must explicitly **"Verify and Allow"** before the session begins to ensure compliance with privacy and data protection.

How It Works

1. **Agent Availability**
   - Agents log in to the CoBrowsing dashboard and toggle themselves **online**.
   - Only online agents are eligible to receive incoming requests.
2. **Customer Initiation**
   - The customer visits your website and clicks on the **"Request for Support"** button, where the Cobrowsing is integrated.
   - A simple form opens where the customer enters their **Name** and **Mobile Number**.
   - After filling in the details, the customer clicks **"Connect"**.
3. **Lead Generation**
   - The customer's request instantly creates a **Lead** in the Agent's dashboard.
   - The assigned Agent can view this lead and click **"Request for CoBrowsing."**
4. **Session Code Exchange**
   - When the Agent clicks **Request for CoBrowsing**, a **Support Code** is generated.
   - The Agent conveys this code to the customer (via chat, call, or on-screen prompt).
   - The customer enters the code to verify and allow CoBrowsing access.

5. **Customer Verification**
    - Once the customer confirms by clicking **“Verify and Allow,”** the session request is approved.
    - On the Agent’s dashboard, the **“Request for CoBrowsing”** button changes to a **“Connect”** button.
6. **Session Connection**
    - The Agent clicks **“Connect”** to join the session.
    - The CoBrowsing session starts, allowing the agent to assist the customer in real time.
7. **Agent Identity Display**
    - Once the session is connected, the customer can see the **Agent’s details** (e.g., name, role, profile info) in a modal.
    - This modal auto-hides after **10 seconds**, maintaining transparency while ensuring a clean user interface.

How to Set Up Inbound CoBrowsing

1. **Enable CoBrowsing on Website**
    - Integrate the **“Request for Support”** button on your website or application using Script. You can find this Admin → Settings → Integration.

      IMAGE
    - Configure it to trigger the CoBrowsing initiation form (Name, Mobile Number fields).
2. **Configure Lead Routing**
    - Ensure leads are mapped to available agents in the CoBrowsing console.
    - Define routing rules (e.g., round robin, skill-based routing).
3. **Agent Dashboard Setup**
    - Agents must have access to the CoBrowsing dashboard.
    - Ensure the **Request for CoBrowsing** and **Connect** buttons are properly configured.
4. **Support Code Configuration**
    - Enable support code generation and mapping.

- Ensure customers can easily enter the support code in the CoBrowsing request modal.

5. **Agent Identity Settings**
    - Configure what details (e.g., name, designation, avatar) should display in the **Agent Details Modal**.
    - Set the auto-hide timer (default: 10 seconds).

Low Bandwidth CoBrowsing

Some customers may experience slow internet connectivity, making a full-featured CoBrowsing session difficult. To ensure session continuity, Inbound CoBrowsing supports **Low Bandwidth Mode (Lite Mode)**.

How It Works

When the customer's internet speed drops below a set threshold (configurable in the console), the session automatically switches from **Normal Mode** to **Lite Mode**.

- Instead of rendering the full website in real time, **Lite Mode displays a tabular/structured version of the web page**.
- This ensures faster loading times and smoother interaction for both customer and agent.

How to Enable Low Bandwidth Mode

1. Navigate to **Admin → Settings → Options → CoBrowse → Admin Settings**.
2. Enable **Low Bandwidth CoBrowsing**.
3. Input the minimum internet speed threshold (in kbps) under **Low Bandwidth Network Limit**.

Switching Modes

There are two ways to switch between Normal and Lite Mode:

1. **Auto Switching**
    - The system checks the internet speed at the start of the session and at regular intervals (every 20 seconds).

- If the speed falls below the configured threshold, a pop-up notification appears.
- With confirmation, the session switches to Lite Mode automatically.

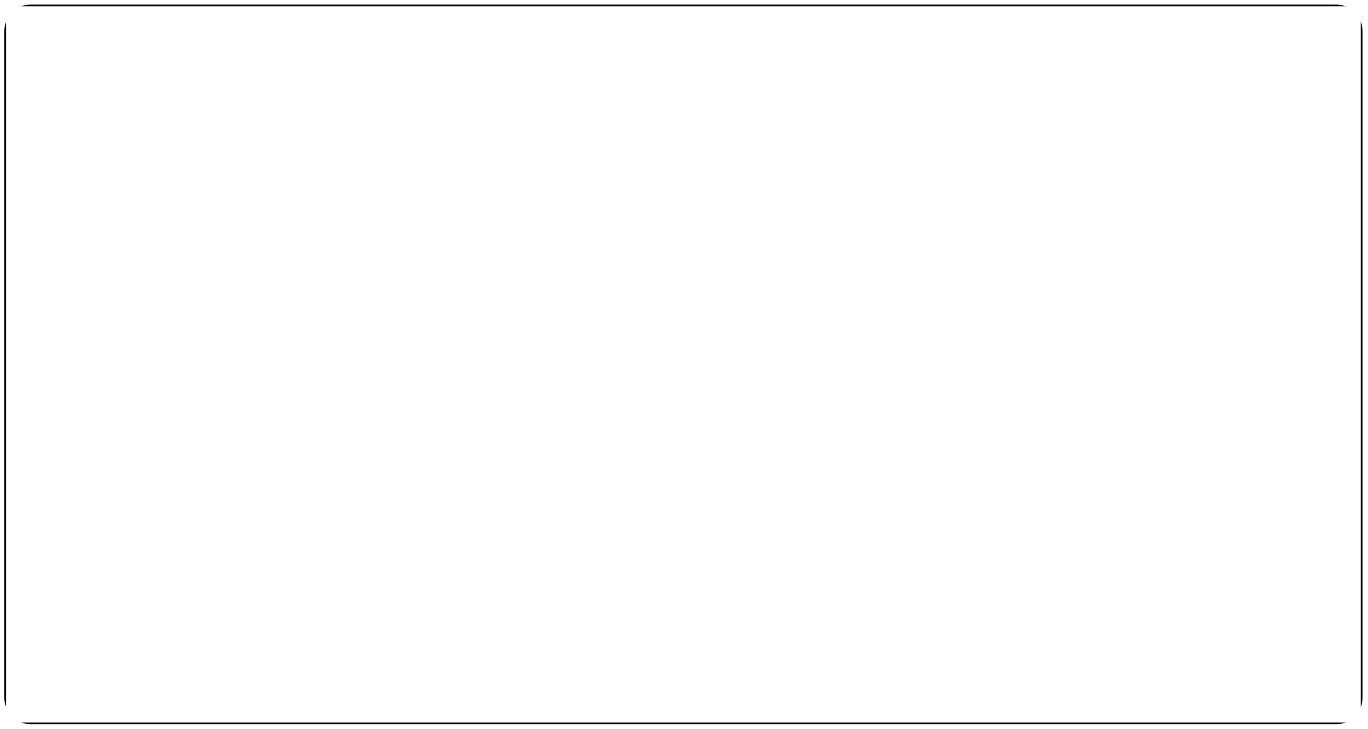
2. **Manual Switching**
    - Agents can manually switch to Lite Mode using the **“Lite Mode”** button on the toolbar.
    - Agents can also revert back to Normal Mode using the same button once the connection improves.

Best suited for: Customers in regions with unstable or low internet speeds.

12.2.3.2. Outbound CoBrowsing

What is Outbound CoBrowsing

Outbound CoBrowsing allows agents to proactively initiate a co-browsing session with customers by sending them a secure link or searching and connecting through pre-captured lead details. Unlike Inbound CoBrowsing (where the customer requests support), here the **agent initiates the session**.



How It Works

1. The agent generates a drop link or searches for the customer lead.
2. The customer receives a secure link via SMS/Email (in case of drop link) or a CoBrowsing request via the search approach.
3. The customer allows access by verifying through the pop-up or requesting approval.
4. Once accepted, the **agent can click 'Connect'** and start the CoBrowsing session.

Pre-Requisites

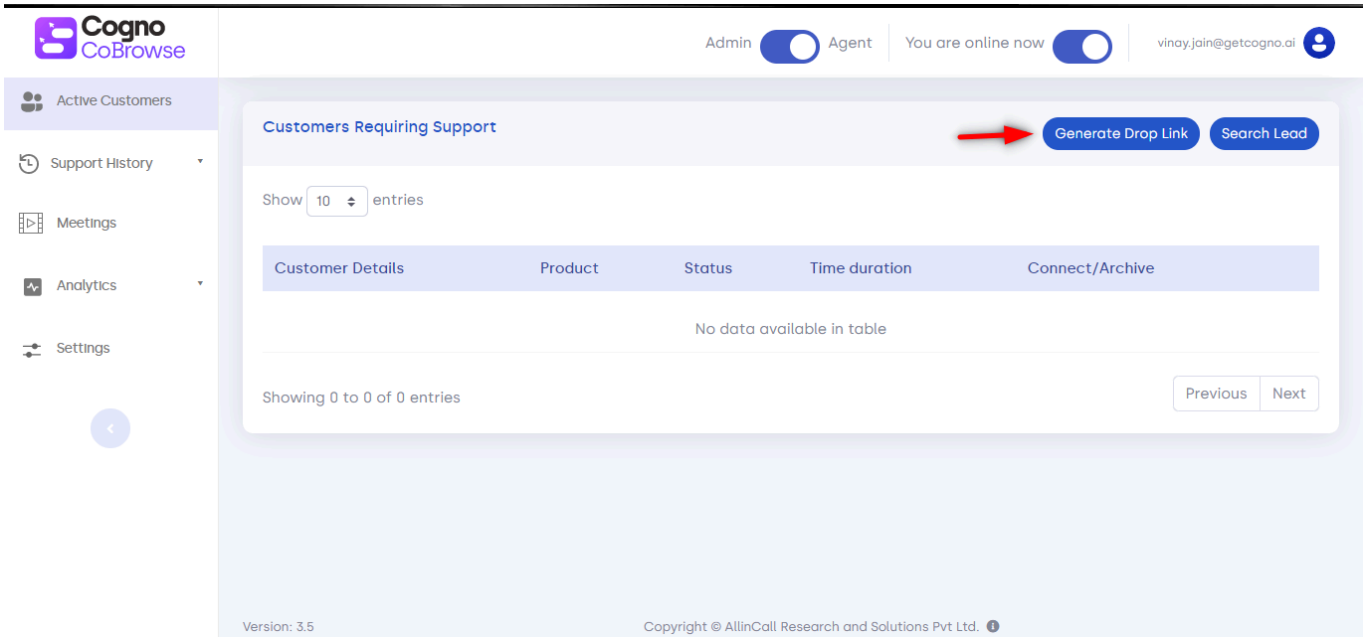
- The client's website **must have JS (JavaScript)** integrated.
- The agent should be logged in and marked as **available** in the console.

- Customer details (Name, Mobile, Email) must be correctly captured for initiating the session.
- SMS and Email gateway configurations must be enabled if drop links are to be triggered automatically.

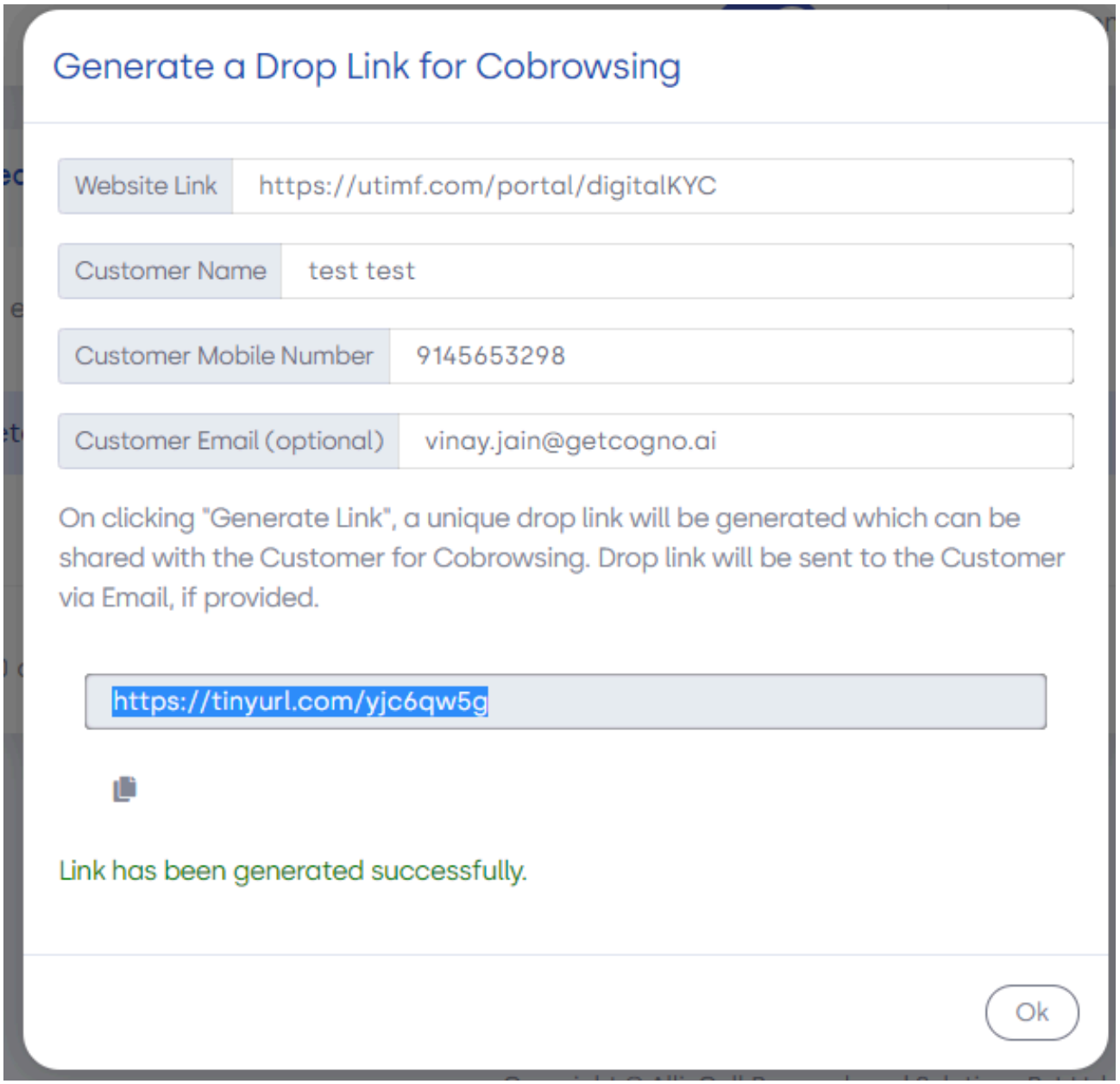
How to Set Up

Generate Drop Link Approach

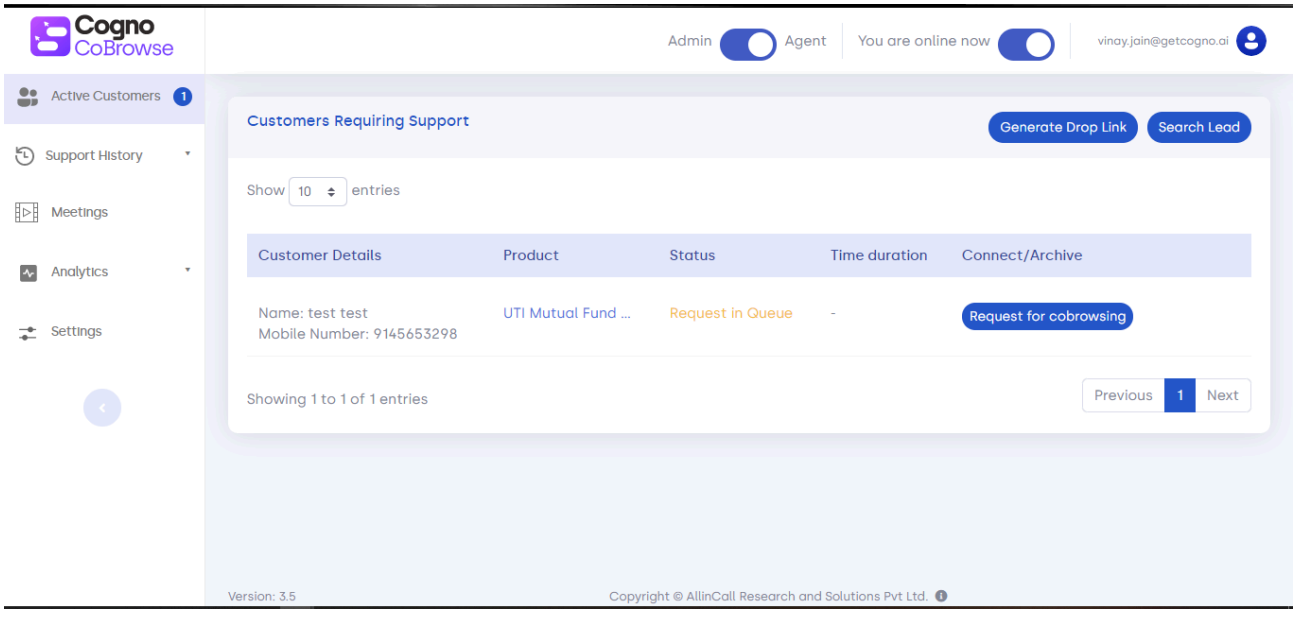
- The agent clicks on the **“Generate Drop Link”** button.



- Fills in the following details:
  - **Website URL:** Must have CJS integrated.
  - **Customer Name:** Name of the customer
  - **Customer Email** (optional if SMS only, mandatory if email link required): Email id of the customer to trigger a drop link for Cobrowsing
  - **Customer Mobile:** Mobile no. of the customer to trigger a drop link for Cobrowsing



- Customer opens the link → lead appears on the agent dashboard.

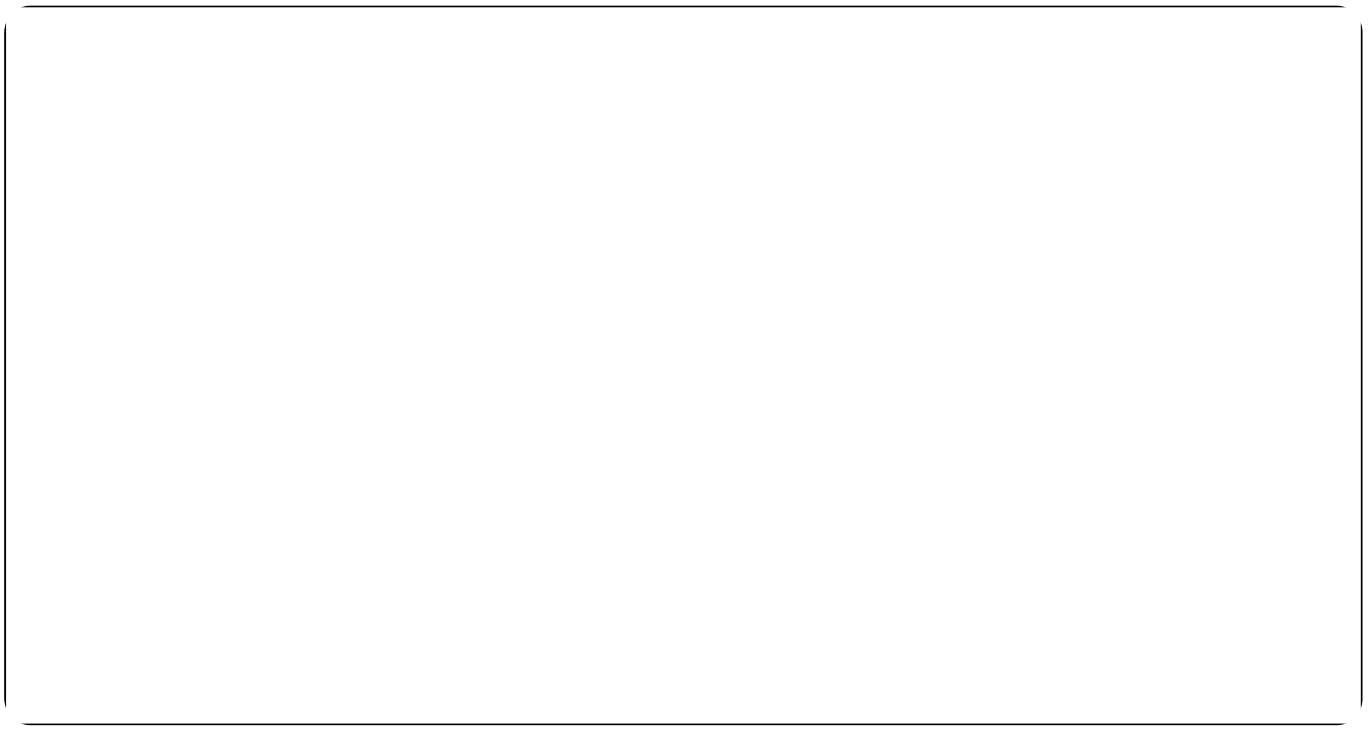


Modified Drop Link Flow:

If the client has enabled the **“Show Verification Code Popup”** toggle:

- Customer sees an **Allow/Decline pop-up** when opening the link.
- If **Allow** → agent’s request button changes to **Connect**.
- If **Decline** → button remains at **Request for CoBrowsing**.

Search Lead Approach



- Used when leads are **already captured** (e.g. customer provided details earlier, like Phone number in this case).
- The agent clicks on **“Search Lead”** and enters the search parameter (e.g., customer mobile number in the below case).
- Lead appears in the agent dashboard.
- Agent clicks on **Request for CoBrowsing** → customer receives approval request.
- Once the customer allows, the agent sees the **Connect** button and can initiate a session.

- After connecting, the further flows remain the same as Inbound CoBrowsing Session.

12.2.3.3. Reverse CoBrowsing

What is Reverse CoBrowsing

Reverse CoBrowsing is a specialized co-browsing approach where the **agent initiates and drives the session directly from the client's website**. Unlike Inbound or Outbound methods, in Reverse CoBrowsing, the **agent fills the customer's form on their behalf** while still allowing visibility and interaction for the customer. This is particularly useful in scenarios where customers need additional handholding or where form-filling accuracy is critical.

Pre-requisites for Reverse CoBrowsing

- The client website must have the **CoBrowsing JavaScript (JS) snippet** integrated.
- Agents should have valid credentials and be marked **online** in the dashboard.
- Customer communication channels (SMS/Email) should be configured for link sharing or any other offline source.
- Browser compatibility should be verified (latest Chrome/Edge/Firefox recommended).

How Reverse CoBrowsing Works

1. **Agent Login & Availability**
    - The agent logs in to the dashboard and toggles themselves **online** to be available for sessions.
    - Each agent is assigned a **unique code** for generating support links on the Top left of the console. This ensures proper **agent-session mapping**.
2. **Agent on Website**
    - The agent navigates to the client's website/page where the customer needs help (e.g., filling out a form).
    - The agent clicks on the **Generate Support Link** button on the website.
3. **Enter Customer Details**
    - After clicking the Generate Support Link button, a Connect with the Customer form opens up.
    - The agent fills in the customer's details along with their unique code.

    - This step maps the session correctly to the agent.
4. **Generate and Share Link**
    - After clicking **Generate Link**, a support link is created.
    - The agent can **copy and share** this link with the customer (via email, SMS, or any other communication channel).
5. **Customer Joins Session**
    - Once the customer opens the support link, the Reverse CoBrowsing session is initiated.
    - The agent now has the control to assist and even fill out the form **on behalf of the customer**.

Features of Reverse CoBrowsing

Agents have access to a rich set of tools during a Reverse CoBrowsing session. The **toolbar** includes:

- **Capture Screenshot** – Take screenshots of the current page for records.
- **View Screenshot** – Access previously captured screenshots.
- **Invite an Agent** – Bring another agent into the ongoing session.
- **Chat with Customer** – Text chat directly with the customer within the session.
- **Send Shareable Link** – Generate and send an additional support link if required.
- **Drawing Pen** – Highlight or mark areas on the page to guide the customer.
- **End Session** – Securely terminate the co-browsing session once completed.

Benefits of Reverse CoBrowsing

- **Higher Control:** Agents can take full responsibility for filling out customer forms.
- **Reduced Errors:** Ensures form-filling accuracy when customers face difficulties.
- **Faster Resolution:** Saves customer time by letting agents complete actions directly.
- **Better Experience:** Customers only need to approve and observe the process, reducing friction.

12.2.4. Admin Persona

Active Customers

Support History

Analytics

Agent Management

Audit Trail

Settings

12.2.4.1. Active Customers

The **Active Customers tab** provides a live view of all customer requests currently being handled. Displays the complete list of all **leads assigned** to agents across products and categories.

For Admin

- Admin can view detailed information such as:
  - **Customer Name & Details**
  - **Assigned Agent**
  - **Product (Website/Application)**
  - **Category of Request**
  - **Language of Request**
  - **Request Date & Time**
  - **Session Start Date & Time**
  - **Status** (Active/Closed)
  - **Session Duration**
  - **Notify Agent**
- Admins also have the ability to **send notifications to agents** regarding leads assigned to them.

Lead Transfer (via Supervisor)

While Admins can view all sessions, **lead transfer functionality** is primarily handled by Supervisors:

- Supervisors can transfer a lead from one agent to another.
- Transfer restrictions:

    - Only agents belonging to the same **Product** and **Category** are visible.
    - Only **one lead at a time** can be transferred.
- Accessible under:
    - CoBrowse → Admin Side → Active Customers → Select Customer → Transfer to Available Agent

For Agent

All the details are the same as Admin, except for a few columns

- The agent sees an option to **Connect** or **Archive** the Active Customers
- The agent does not see the **Notify** column.

12.2.4.2. Support History

The **Support History** tab provides Admins and Supervisors with a **complete log of all customer support requests** that were raised across CoBrowsing sessions and meetings. This section helps in auditing, analyzing patterns, and understanding how customers initiate CoBrowsing sessions.

Features in Support History

- **Comprehensive Session Log**
  - View all past customer support requests.
  - Access session details such as customer info, agent info, product, category, start time, duration, and status.
- **CoBrowsing Session Tracking**
  - Each CoBrowsing request is recorded with details of **how the session was initiated**.
  - Applicable for both:
    - **Support History → CoBrowsing**
    - **Support History → Meetings**
- Since multiple **pop-up types** are supported for initiating CoBrowsing, the system captures the **exact source** of initiation.
- Possible initiation types include :
  - Floating Button
  - Icon
  - Greeting Bubble
  - Exit Intent Popup
  - Inactivity Popup
- **Excel Report Integration**
  - When downloading Support History reports in Excel, the **Session Initiated By** parameter is included in the report.
  - Ensures complete tracking for audits and compliance.

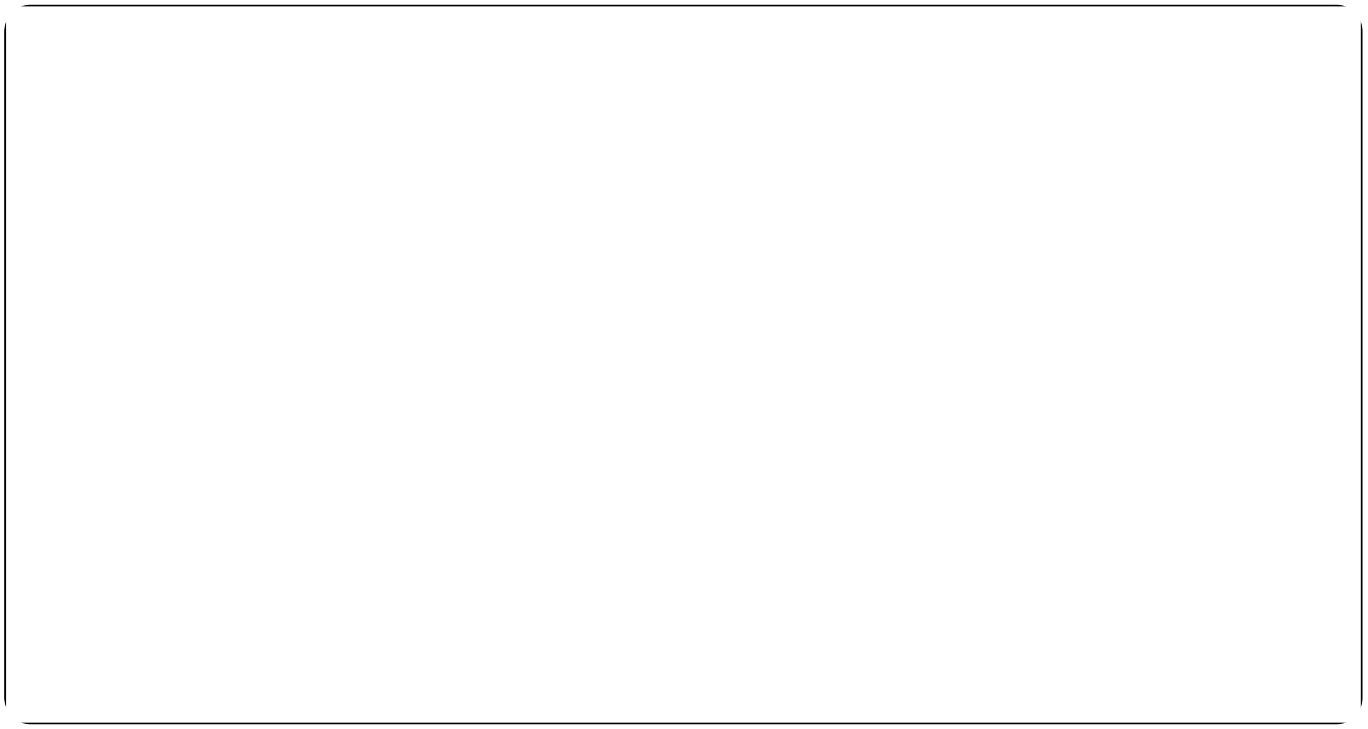
The **Support History** module provides a complete record of customer interactions via CoBrowsing and Meetings. It is divided into two categories:

1. **CoBrowsing History** - Logs all CoBrowsing session outcomes.
2. **Meeting History** - Logs all customer meeting requests and sessions.

This section explains **CoBrowsing History** in detail.

CoBrowsing History

Attended Leads



Attended Leads are all leads that were **assigned and successfully handled by support agents**.

Features:

- View complete details of attended sessions, including customer info, product, agent, category, timestamps, and session duration.

- **Session-End URL Tracking**:
    - An additional field is available in **Session Details → Product Details**, showing the **Drop-off URL** (the last page visited by the customer during the session).
    - Reports now include both:
        - **Session Start (Landing Page)**
        - **Session End (Drop-off Page)**
        - **Path:** CoBrowsing Console → Admin → Support History → CoBrowsing → Attended Leads → Session Details → Product Detail → Session End (URL)

Limitations:

- If the customer **closes the browser mid-session** and does not reconnect within the allowed interval → the last viewed page is marked as Drop-off.
- If the customer reconnects within the interval → the **final page before session closure** is recorded as Drop-off.
- If the **agent ends the session**, the last shared web page is recorded as Drop-off.

Export Options:

- Admins can export attended lead reports, which include session start and end URLs.
- **Download Live Chat History**:
    - Chat transcripts can be exported for selected date ranges.
    - Visible under:
      CoBrowsing Console → Admin → Support History → CoBrowsing → Attended Leads → Export → Select Date Range & Checkboxes → Export
- If both **Chat History** and **Lead Report** options are selected → two separate files are downloaded.
- Exports are applicable **only for Attended Leads**.

Declined Leads

Declined Leads are cases where an **agent requested CoBrowsing**, but the **customer declined the request**.

- These leads are automatically categorized under Declined.
- Detailed logs are available with customer and agent data for auditing.

Path: CoBrowsing Console → Admin/Supervisor → Support History → CoBrowsing → Declined Leads

Unattended Leads

Unattended Leads are all **assigned leads that were not attended by support agents**.

- Automatically tracked when a customer request is generated, but no agent responds.
- Useful for identifying capacity issues or training gaps.

Path: CoBrowsing Console → Admin/Supervisor → Support History → CoBrowsing → Unattended Leads

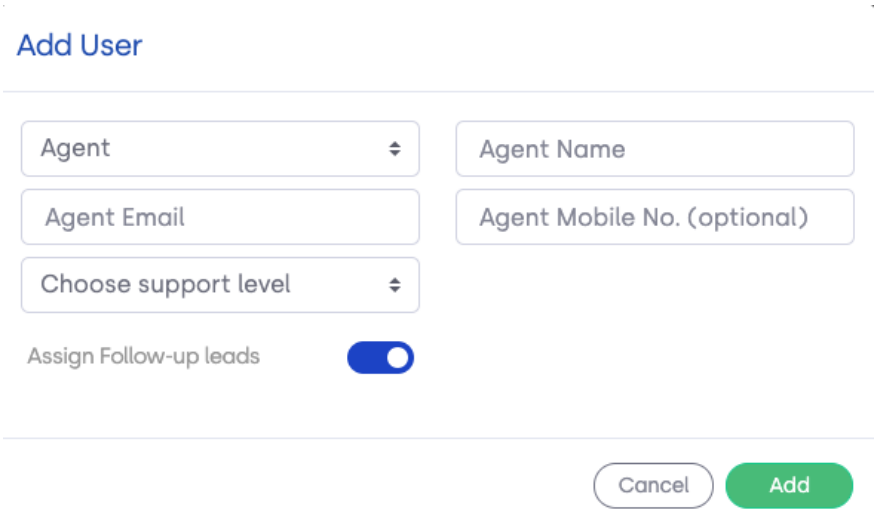
Follow-up Leads

Follow-up Leads are created when:

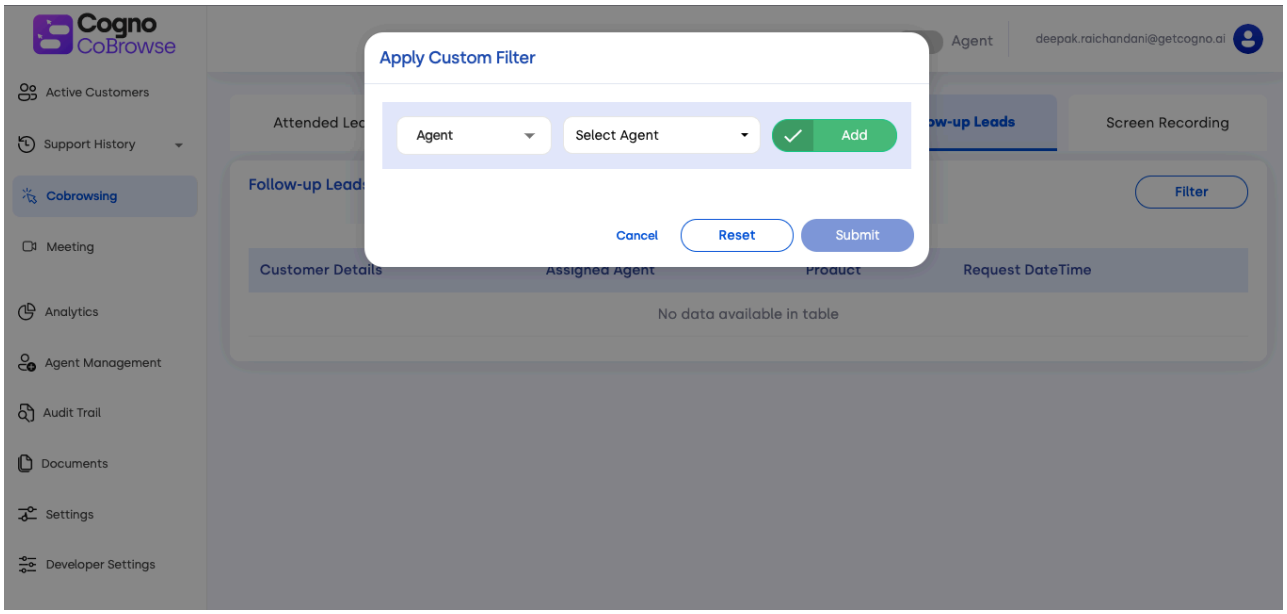
- A lead stays **unassigned for more than 1 hour** (time configurable).
- A lead is captured **outside working hours**.

Features:

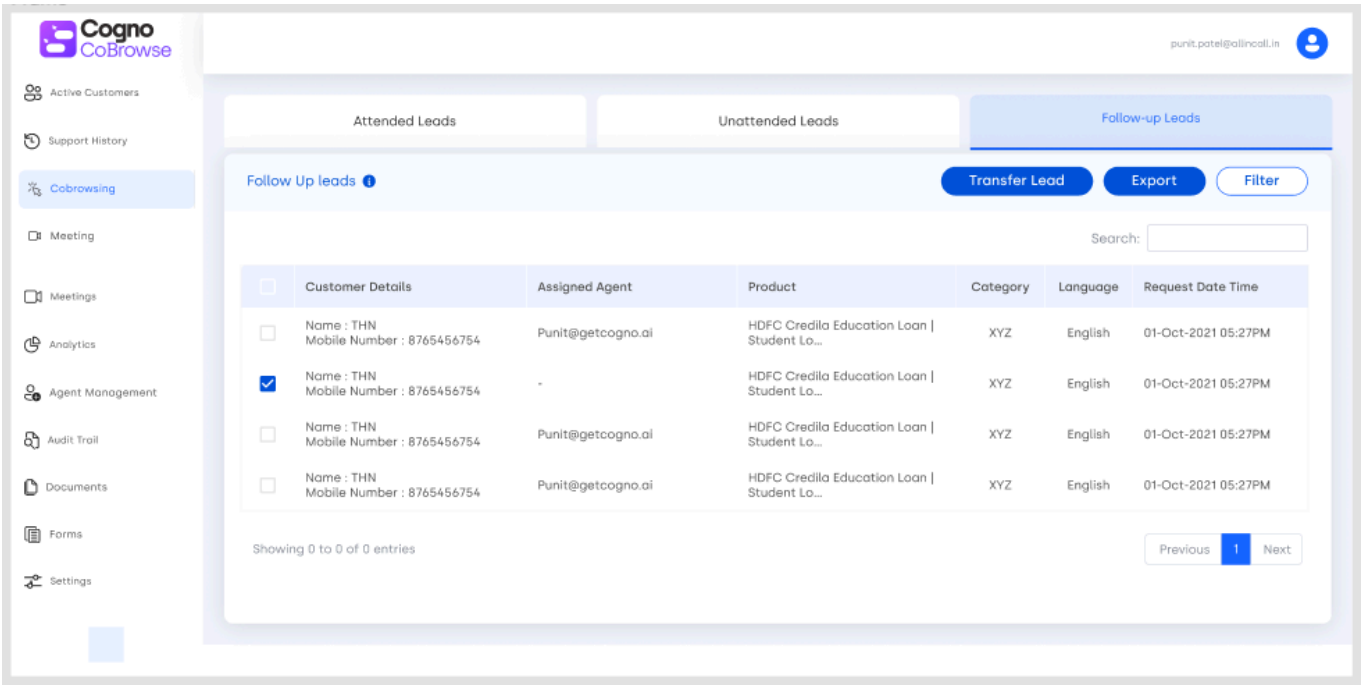
- **Auto-Assignment (Modified Follow-up Leads):**
  - Follow-up leads and unattended leads (caused by agent capacity limits or offline status) can now be auto-assigned to specific agents.
  - Admins/Supervisors can enable **"Assign follow-up lead"** when creating/editing agents.



- **Agent Visibility:**
  - If enabled, a **Follow-up Leads section** is visible to agents alongside Attended and Unattended sections.
  - Agents can filter by Title, Start Date, and End Date.



- **Supervisor/Admin Tools:**
  - The “Assigned Agent” column shows which agent owns the lead.
  - Leads can be transferred to another agent using the **Transfer Lead** button (enabled only after selecting a lead).
  - The transfer dropdown only displays agents who:
    - Belong to the same **Category** and **Language**.
    - Have the **Assign follow-up lead** enabled.



- **Reports:**
  - Exported Excel reports include the **Assigned Agent** column.

Limitations:

- The transfer button remains disabled until at least one lead is selected.
- Leads marked unattended due to agent unavailability (busy/offline) are logged as follow-up leads.
- If multiple customers across categories are selected, the agent list shows only those who cover **all categories**. If none are available, supervisors are notified.

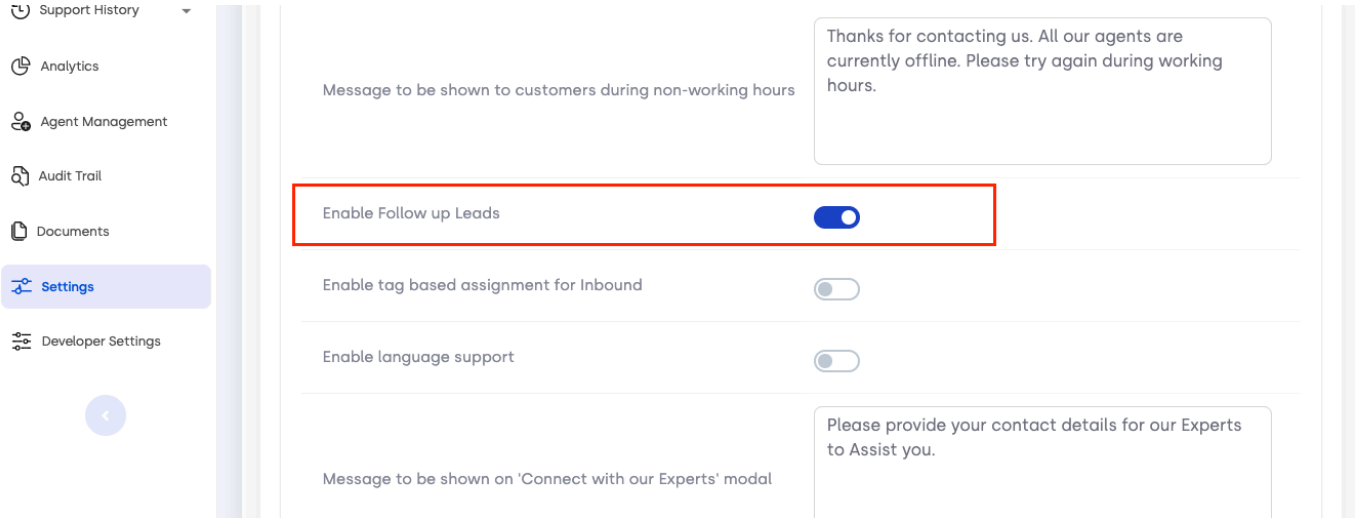
Path:
CoBrowsing Console → Admin/Supervisor → Support History → CoBrowsing → Follow-up Leads

Manual Conversion of Leads

Leads in **Follow-up** and **Unattended** categories can be **manually converted** into “Closed” or “Not Closed” based on outcomes.

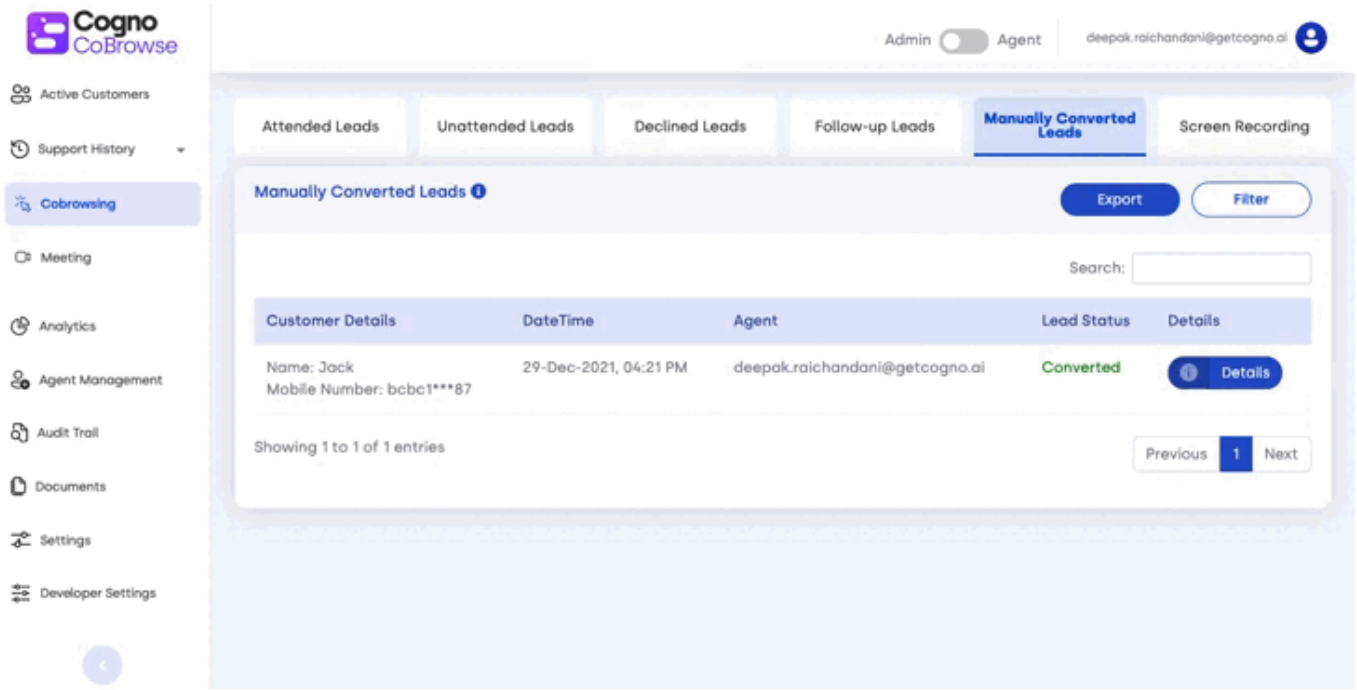
To configure: Enable Follow-up Leads

This is visible under CoBrowsing Console (Admin) > Settings > Options > General > InBound > Enable Follow-up Leads



Features:

- Admin/Admin Ally/Supervisor can:
  - Update lead status to Closed/Not Closed.
  - Add **Remarks** and **Sub-Remarks** (if enabled).
  - Converted leads move into a dedicated **Manually Converted Leads section**.



- Agents can:
  - Convert their assigned Follow-up/Unattended leads to Closed/Not Closed with remarks.

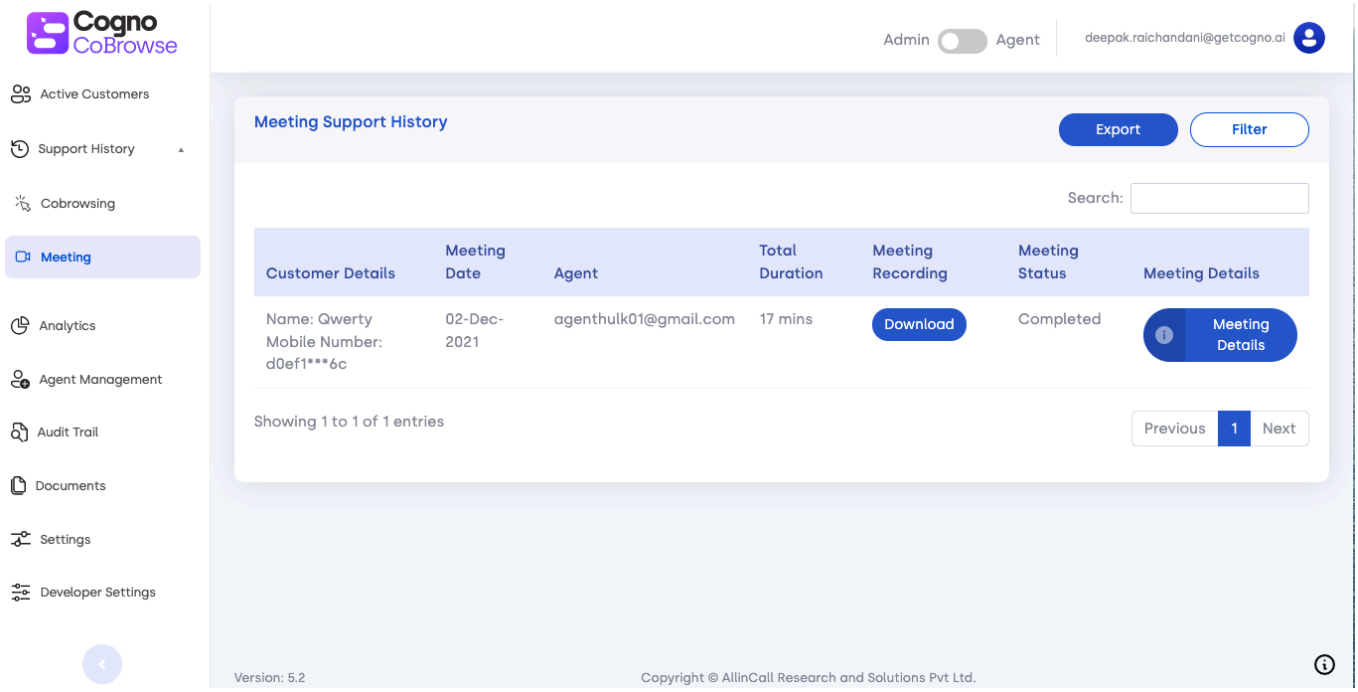
- Converted leads also move to Manually Converted Leads.

Limitations:

- Remarks/Sub-remarks only appear if **“Enable Predefined Remarks with Dropdown”** is enabled.
- When converting from **Unattended Leads**, remarks from when the lead was archived are pre-populated but editable.
- Manually Converted Leads section is **enabled by default**.
- If Follow-up Leads are disabled in settings, this feature is hidden across all roles.

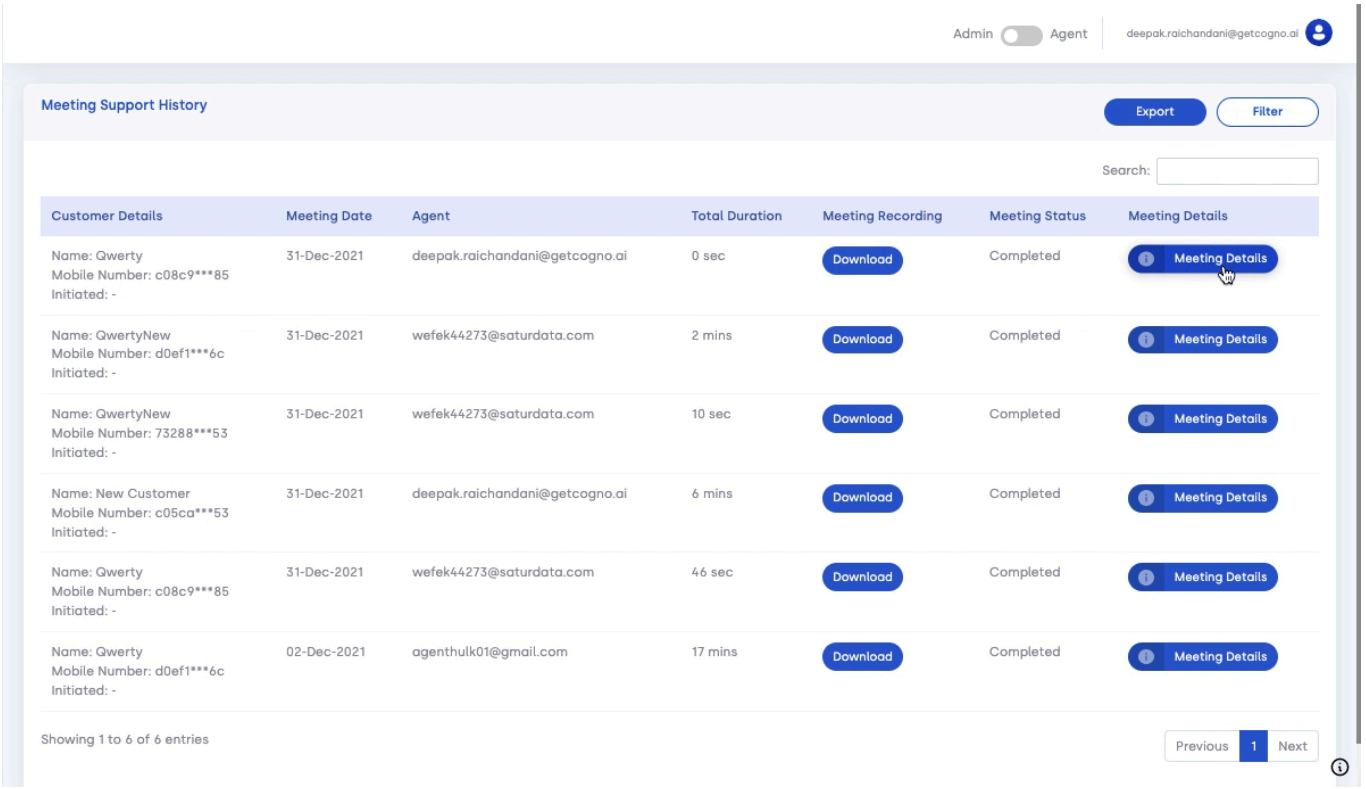
Meeting History

Details about the Meet can be seen here. Admin will be able to download the meeting recording and also see the meeting status and various details related to the meeting.



Customer Details:

- This shows the customer details like the Customer Name, mobile number, and Initiated by (shows the source using which the session was requested from eg, greeting bubble, exit intent, inactivity pop-up)
- Meeting date, the Agent that was assigned to the session, total duration of the session, and the meeting status can also be seen here.
- Meet recordings can be downloaded by clicking on the download button provided.
- Meeting details can be seen by clicking on the button.



12.2.4.3. Analytics

The **Analytics** tab provides Admins and Supervisors with a **comprehensive overview of CoBrowsing activity across all agents**. It helps organizations measure efficiency, identify trends, and evaluate agent performance.

Analytics can also be exported as Excel reports for deeper analysis.

Path:

CoBrowsing Console → Admin/Supervisor → Analytics

General Analytics

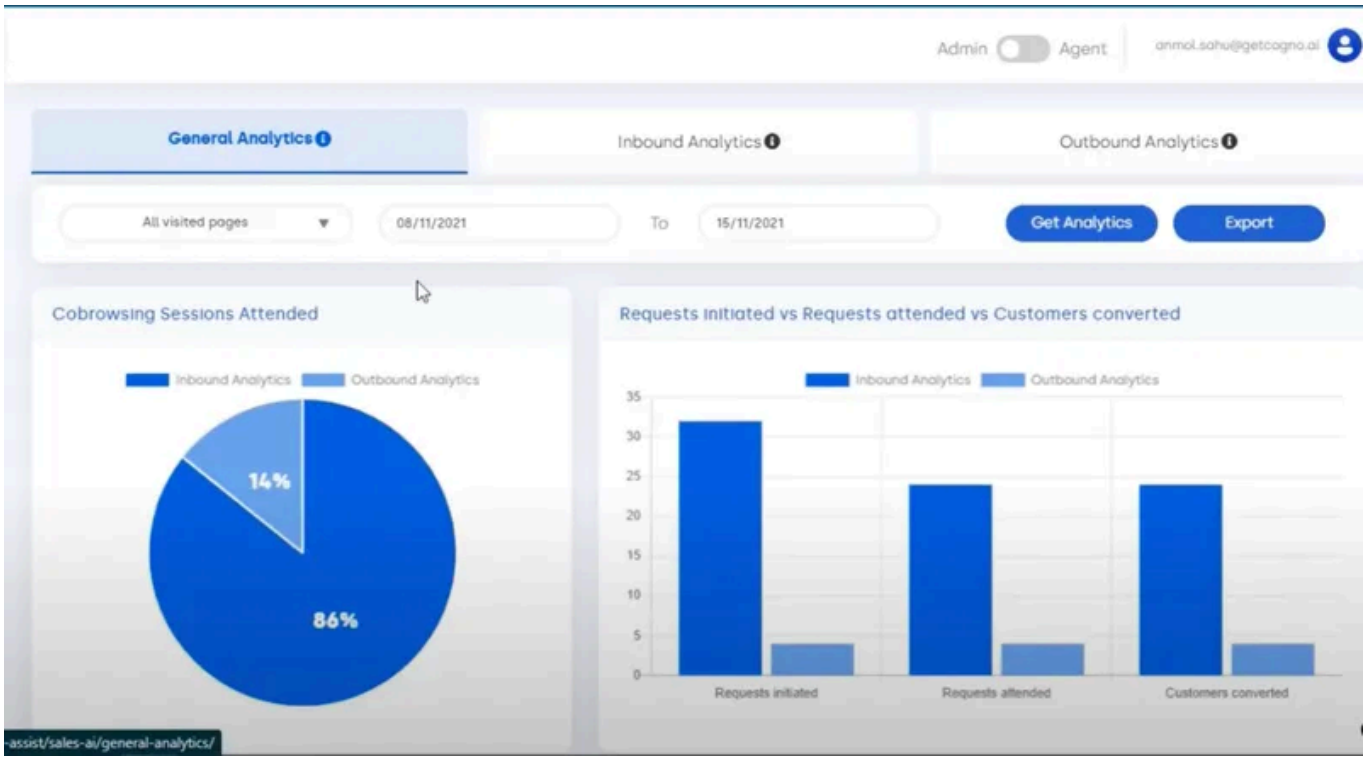
The General Analytics section provides a high-level overview of CoBrowsing performance by comparing Inbound and Outbound approaches. It helps Admins and Supervisors understand which approach is used more frequently and how effective it is in resolving customer queries.

Key Metrics in General Analytics

- **Comparison Between Approaches**
  - Side-by-side view of **Inbound** vs. **Outbound** CoBrowsing sessions.
  - Helps identify which initiation method customers/agents prefer.
- **CoBrowsing Sessions Attended**
  - Total number of sessions completed through each approach.
  - Tracks the adoption of Inbound vs. Outbound.
- **Requests Initiated vs. Requests Attended vs. Customers Converted**
  - **Requests Initiated** → Total number of customer requests created.
  - **Requests Attended** → Number of requests successfully handled by an agent.

- **Customers Converted** → Number of customers who completed the desired action during/after the session.

- **NPS (Net Promoter Score)**
  - Comparison of **NPS ratings** between Inbound and Outbound sessions.
  - Helps measure **customer satisfaction** and **quality of support** for each approach.



Why It's Useful

- Understand customer behavior (do they prefer requesting support or responding to outbound links?).
- Measure **agent effectiveness** across both approaches.
- Identify which approach delivers **better conversion and satisfaction rates**.
- Use data to optimize your CoBrowsing strategy and improve ROI.

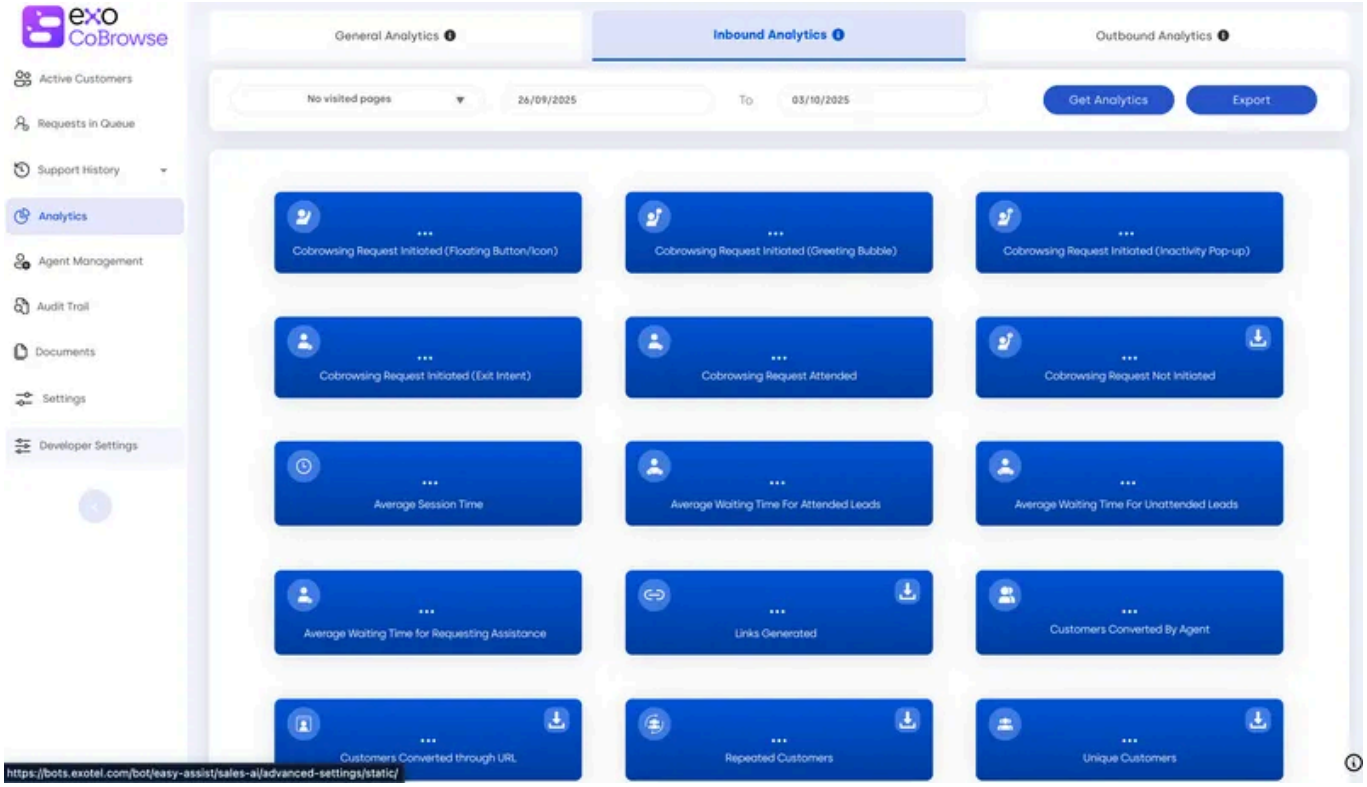
Inbound Analytics

The **Inbound Analytics** section gives Admins and Supervisors a detailed view of all CoBrowsing sessions initiated by customers through the website or application. It helps track customer behavior, agent responsiveness, and overall effectiveness of Inbound CoBrowsing.

Path: CoBrowsing Console → Analytics → Inbound Analytics

Default View

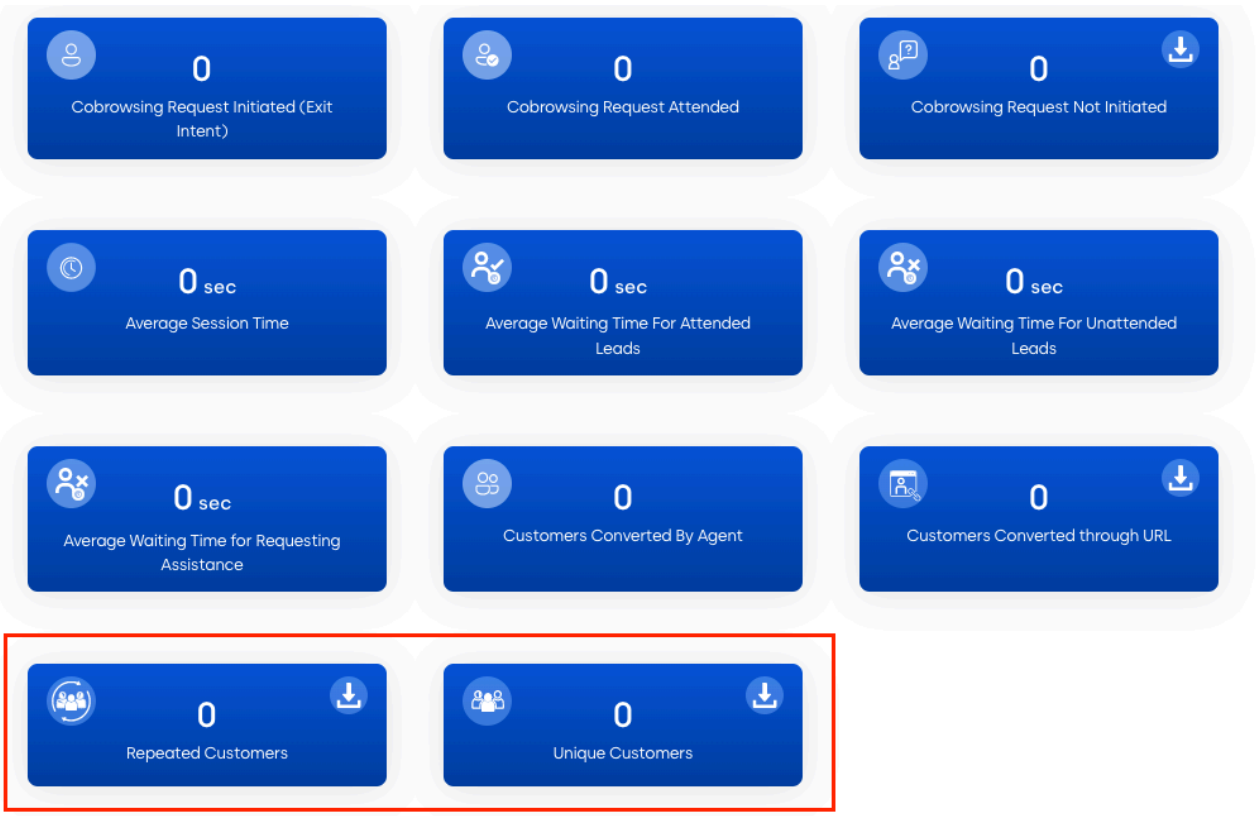
- By default, the **last 7 days of data** are displayed.
- Admins can change filters to view other date ranges.



Cards & Metrics

- **CoBrowsing Request Initiated**
  - Total number of CoBrowsing requests initiated by customers.
- **CoBrowsing Request Attended**
  - Count of customer requests successfully attended by agents.
- **CoBrowsing Request Not Initiated**

    - Number of customers who clicked on **Request for Support** but did not complete session initiation.
- **Average Session Time**
    - Average duration of completed CoBrowsing sessions.
- **Average Waiting Time (Attended Leads)**
    - Time difference between **customer request** and **agent connect** for attended sessions.
- **Average Waiting Time (Unattended Leads)**
    - Time difference between the **customer request** and the **customer leaving** in unattended cases.
- **Customers Converted by Agent**
    - Number of customers converted during sessions directly with agents.
- **Customers Converted through URL**
    - Number of conversions recorded via session URLs (e.g., customer completed an action on the provided link).
- **Repeated Customers (Admin only)**
    - Customers who attended more than one session.
- **Unique Customers (Admin only)**
    - Customers attending their **first CoBrowsing session**.



Visible under: CoBrowsing Console → Admin → Analytics → Inbound Analytics

These metrics are also available in **Mailer Analytics**:

- Settings → Email Settings → All Profiles → Inbound → Unique Customers
- Settings → Email Settings → All Profiles → Inbound → Repeated Customers

Graphs & Visualizations

- **Service Request Analytics**
  - Graph showing counts of:
    - Requests Initiated
    - Requests Attended
    - Requests Not Initiated
    - Customers Converted
- **Agent's Average NPS Score**
  - Displays the average **Net Promoter Score (NPS)** of all agents under the Admin.

- **Traffic Sources**
  - Data on visits to client pages where CoBrowsing requests were initiated.
  - Shows the number of sessions done on each page.
- **Page-Wise Session Analytics**
  - Comparison of web pages to identify the **pages with the highest CoBrowsing activity**.
- **Agent-Wise CoBrowsing Session Analytics**
  - Per-agent breakdown showing:
    - Requests Initiated
    - Requests Attended
    - Requests Not Initiated
    - Customers Converted

Why Inbound Analytics is Useful

- Helps identify **bottlenecks** (e.g., high waiting time).
- Reveals which **web pages and triggers** (floating button, greeting bubble, etc.) generate the most requests.
- Tracks **conversion success** by agent and by URL.
- Differentiates **first-time users (Unique)** from **returning customers (Repeated)**.
- Provides actionable insights into **agent performance and responsiveness**.

Outbound Analytics

The **Outbound Analytics** section provides Admins with detailed insights into CoBrowsing sessions initiated by agents. It includes data from both **Drop Link** and **Search Lead** approaches, helping organizations measure the effectiveness of proactive engagement with customers.

Path:
CoBrowsing Console → Admin → Analytics → Outbound Analytics

Cards & Metrics

- **Captured Leads**
  - Total number of leads captured (via search tags or link generation).
- **Searched Leads**
  - Count of total leads searched by agents using the **Search Lead** function.
- **CoBrowsing Request Attended**
  - Number of outbound CoBrowsing sessions successfully attended.
- **Customers Converted**
  - Count of outbound leads successfully converted during/after sessions.
- **CoBrowsing Request Denied by Customer**
  - The number of outbound CoBrowsing requests declined among customers.
- **Average Session Time**
  - Average duration of outbound CoBrowsing sessions.
- **Conversion Rate**
  - Percentage of leads converted relative to leads attended.
- **Average Waiting Time (Attended Leads)**
  - Time between **customer request (Search Lead entry)** and **agent connect**.
- **Average Waiting Time (Unattended Leads)**
  - Time between the **customer request (Search Lead entry)** and the **customer leaving**.

Note: To mark leads as Attended or Unattended, the **agent must search the lead**.

Graphs & Visualizations

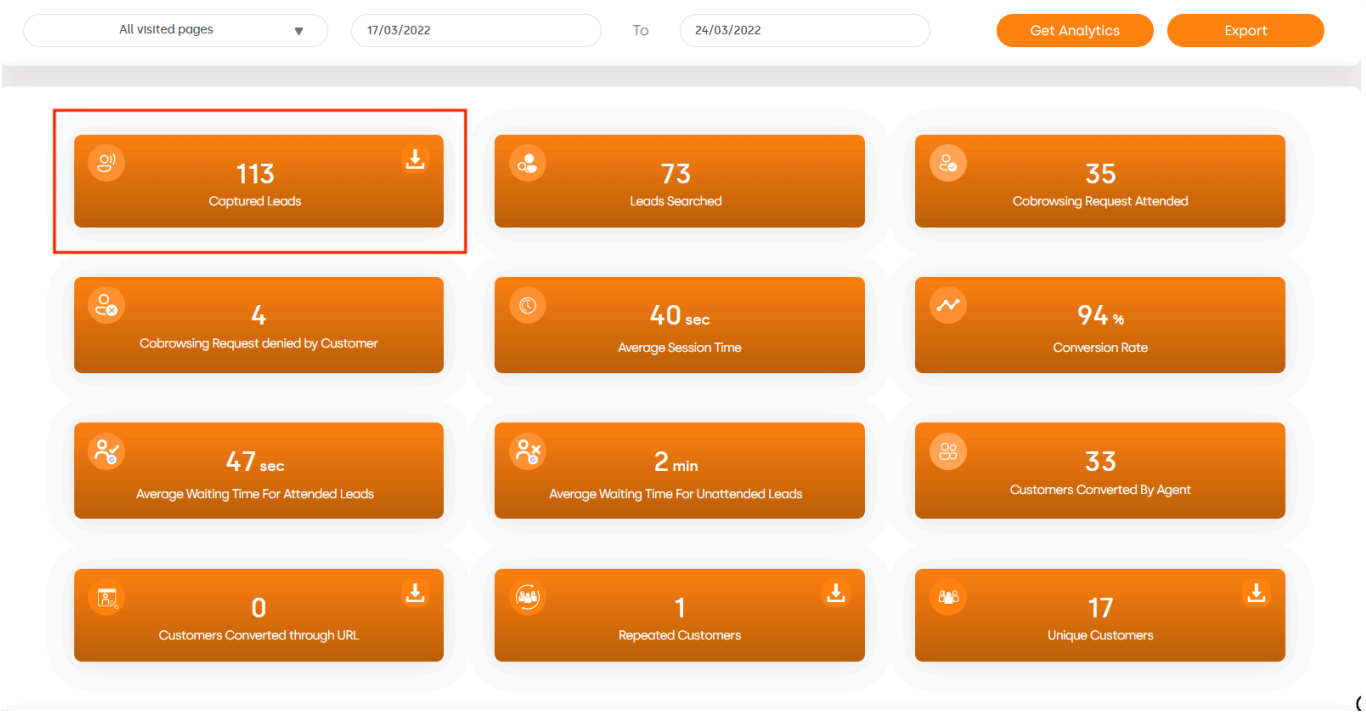
- **Service Request Analytics**
  - Graph showing:
    - Captured Leads
    - Requests Attended
    - Customers Converted
    - Requests Denied
- **Agent's Average NPS Score**
  - Displays average **Net Promoter Score** across all agents.

- **Page-Wise Session Analytics**
  - Compares which web pages see the most outbound CoBrowsing activity.
- **Agent-Wise CoBrowsing Session Analytics**
  - Breakdown per agent:
    - Leads Captured
    - Requests Attended
    - Customers Converted
    - Requests Denied

Captured Leads Report

Admins can **download Captured Leads** as an Excel report (.xls).

Path:
CoBrowsing Console → Admin → Analytics → Outbound Analytics → Captured Leads card → Download



Report Contents:

- **Drop-off Leads** → Customers who filled search fields but never joined a session.
- **Attended Session** → Leads who attended at least one CoBrowsing session.

- **Not Attended Session** → Leads generated and searched but did not attend or declined.

Rules & Notes:

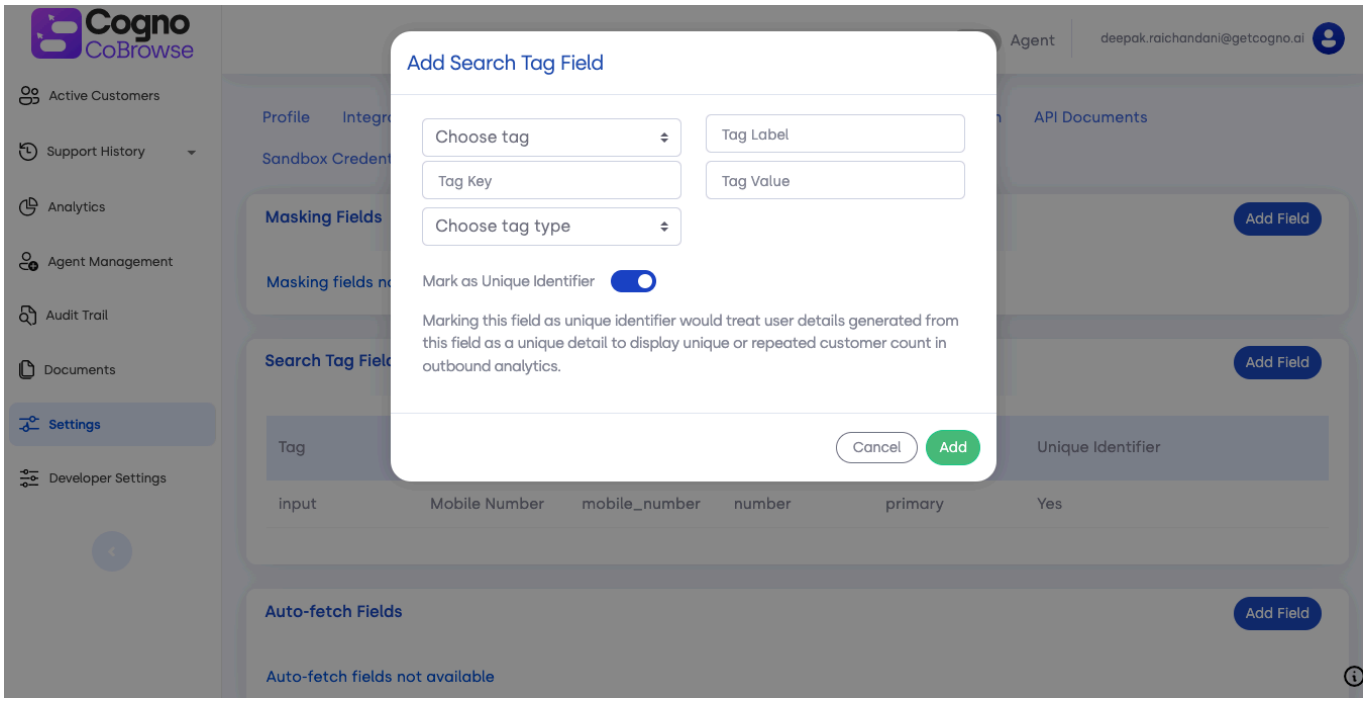
- If <1000 records → file downloads immediately.
- If >1000 records → report is emailed to the configured email ID.
- Report columns are **dynamic** based on the configured **Search Tag Fields** at the time of download. Example:
    - On Jan 1 → only “Mobile Number” search tag exists → report has “Mobile Number” column.
    - On Jan 2 → “First Name” search tag is added → new reports show both “Mobile Number” + “First Name.”
    - For older sessions, missing field values show as **“-”**.

This report is also available in **Mailer Analytics**: Settings → Email Settings → All Profiles → Outbound → Search Leads → Captured Leads.

Unique & Repeated Customer Analytics (Search Lead – Admin Only)

Outbound Analytics also supports customer-level tracking when **unique identifiers** are configured in Search Tag Fields.

To enable:
Settings → Advanced Settings → Search Tag Fields → Add Field Modal → Mark as Unique Identifier.



Cards:

1. **Unique Customers** → Customers who attended a session for the first time.
2. **Repeated Customers** → Customers who attended multiple sessions.

Visible under: CoBrowsing Console → Admin → Analytics → Outbound Analytics

Filters & Reports:

- Filters can be applied by **date range**.
- Reports are downloadable from the cards individually.
- Sample reports available for **Unique Customers** and **Repeated Customers**.

Limitations:

- At least one **unique identifier tag** must be enabled (e.g., Mobile Number, Customer ID).
- Deleting a Search Tag does not remove historical data.
- Downloaded report columns depend on search tags **present at download time**, not session time.
- If a non-unique identifier (e.g., Email ID) is used → customers always appear as **unique** regardless of repeat visits.
- Multiple fields can be marked as unique identifiers.

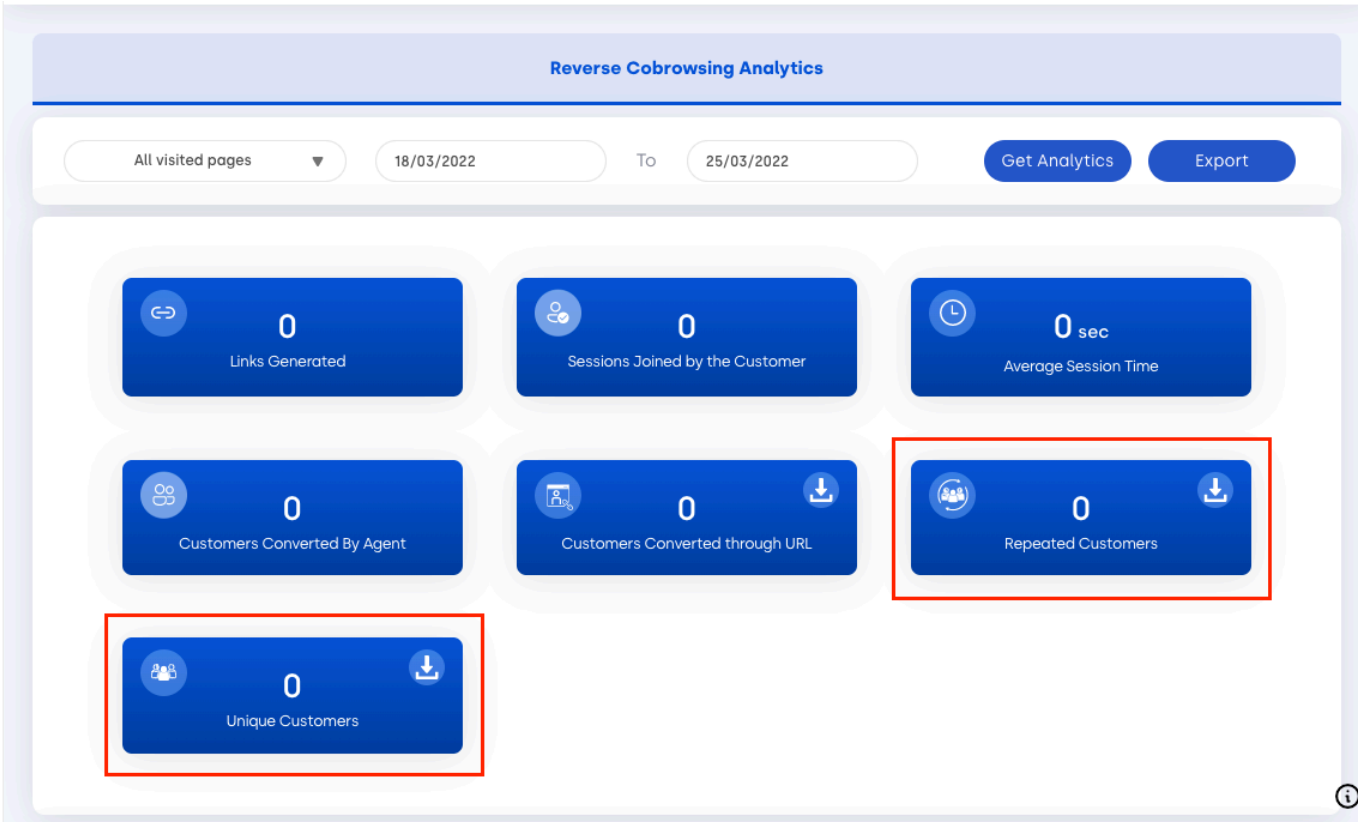
Why Outbound Analytics is Useful

- Tracks **agent-driven engagement** effectiveness.
- Helps optimize **Search Lead workflows** and Drop Link campaigns.
- Identifies **conversion gaps** (high captured leads but low conversions).
- Measures **NPS & waiting times** for proactive support sessions.
- Provides visibility into **unique vs. repeat customer behavior** for outbound campaigns.

Reverse CoBrowsing

The **Reverse CoBrowsing Analytics** section helps Admins and Supervisors measure customer engagement and agent performance in sessions initiated via the **Reverse CoBrowsing approach**. In this mode, agents generate and share a support link with customers, who then approve the session.

Path: CoBrowsing Console → Admin → Analytics → Reverse CoBrowsing Analytics



Cards & Metrics

1. **Unique Customers**
    - Customers who attended a Reverse CoBrowsing session for the **first time**.
2. **Repeated Customers**
    - Customers who attended more than one Reverse CoBrowsing session.

Filters & Reports

- Filters can be applied by **date range** (similar to Inbound & Outbound Analytics).
- Each card provides a **Download button** for reports.
- If the count is **less than 1000 records** → report downloads immediately.
- If the count is **more than 1000 records** → report is sent to the configured **email ID**.

Sample reports available:

- Unique Customer Report
- Repeated Customer Report

Availability in Mailer Analytics

These reports can also be configured under **Mailer Analytics** for automatic scheduling:

- **Inbound Analytics**
    - Settings → Email Settings → All Profiles → Inbound → Unique Customers
    - Settings → Email Settings → All Profiles → Inbound → Repeated Customers
- **Outbound Analytics**
    - Settings → Email Settings → All Profiles → Outbound → Search Leads → Unique Customers
    - Settings → Email Settings → All Profiles → Outbound → Search Leads → Repeated Customers
- **Reverse CoBrowsing Analytics**
    - Settings → Email Settings → All Profiles → Reverse CoBrowsing → Unique Customers
    - Settings → Email Settings → All Profiles → Reverse CoBrowsing → Repeated Customers

12.2.4.4. Agent Management

The **Agent Management** section in the CoBrowsing console allows Admins and Supervisors to manage their teams, track availability, configure roles, and ensure effective handling of leads. This section is the central place to add, monitor, activate/deactivate, and export details of all agents, supervisors, and admin allies.

Path: CoBrowsing Console → Agent Management

[Click here to play the walkthrough video in a new tab]

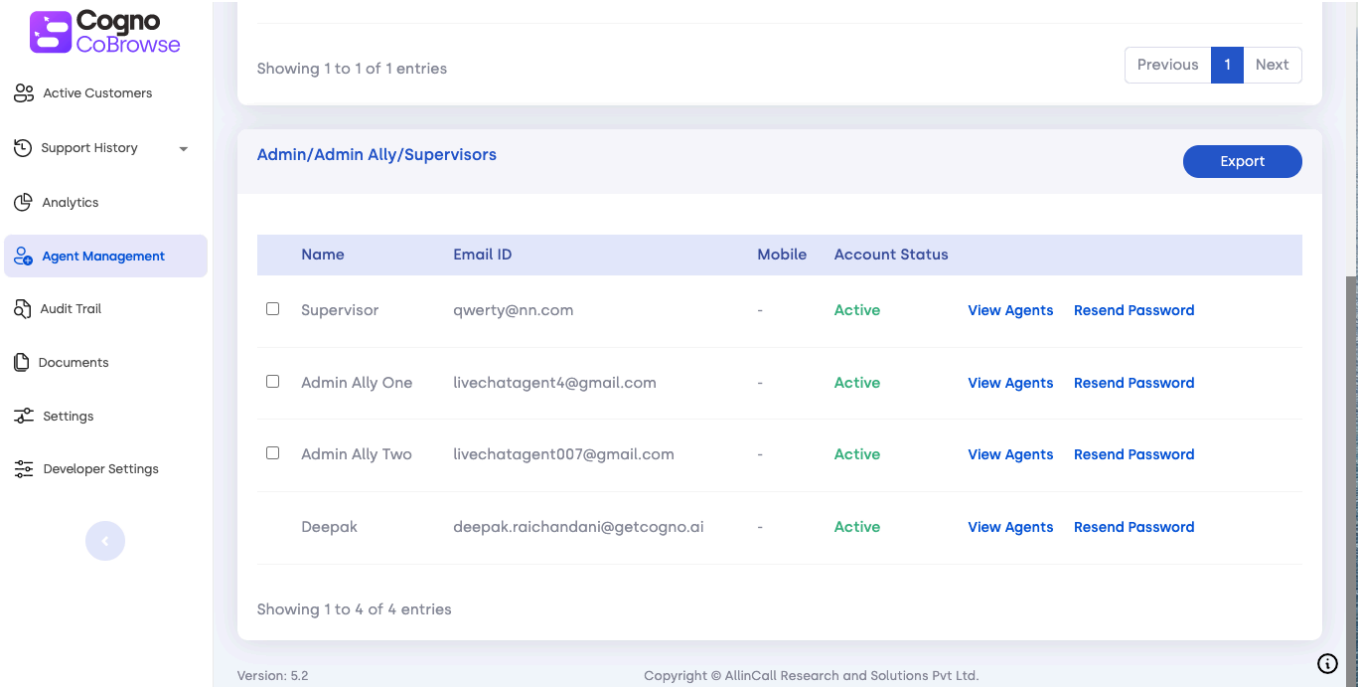
Agent Status

Admins and Supervisors can track the availability and activity of agents using the following tabs:

- **Total** → All agents mapped under the Admin/Supervisor.
- **Online** → Agents currently logged in and online.
- **Offline** → Agents who are offline.
- **Available** → Agents who are online but not inside any active session.
- **Active** → Agents whose IDs are active.
- **Inactive** → Agents whose IDs have been deactivated.

Note:

- Applied filters are highlighted in theme colors.
- Table headers change dynamically based on applied filters.



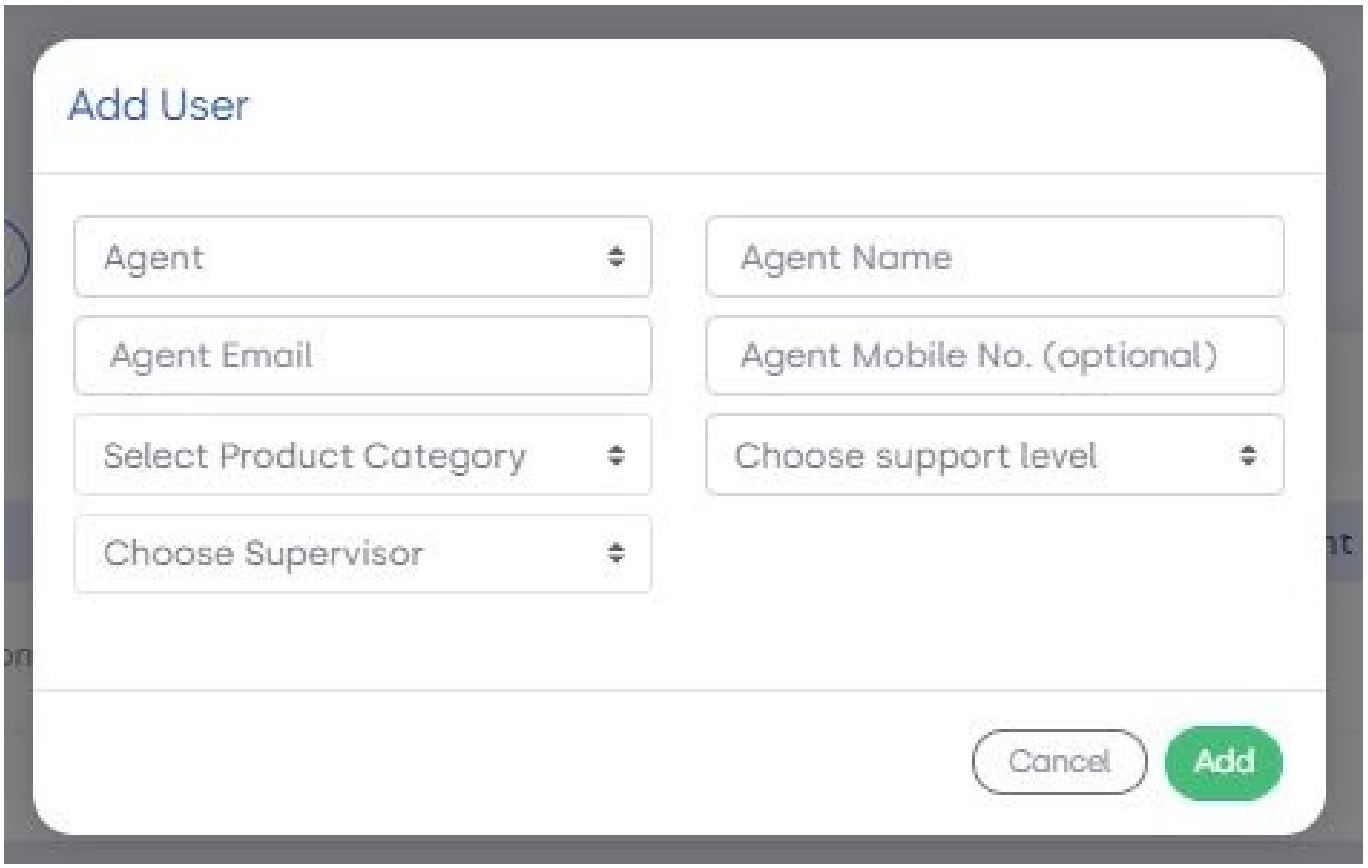
Adding Users (Agents, Supervisors, Admin Allies)

There are two ways to add new users:

1. **Add User** → Manually create a new user.
2. **Create User via Excel** → Bulk upload user details using an Excel template.

Add a New Agent / Supervisor

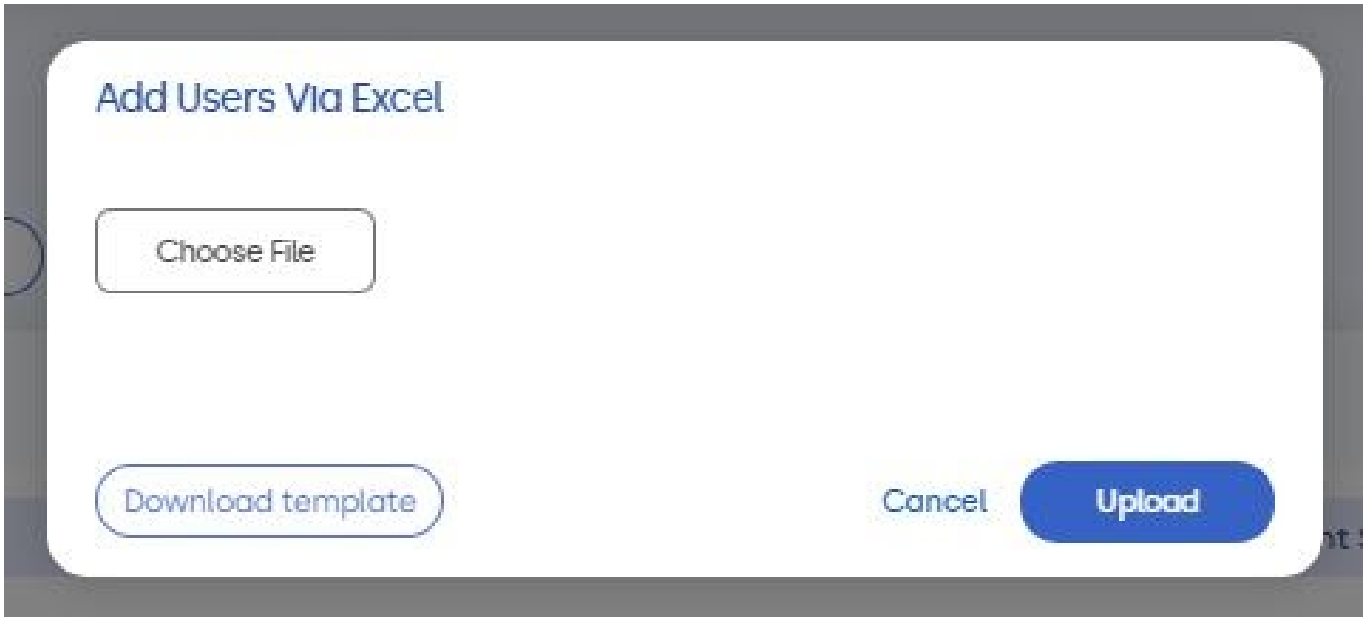
- Admin/Supervisor can **create, edit, or delete** an agent.
- Details to provide include:
  - Name
  - Type (Agent/Supervisor/Admin Ally)
  - Mobile Number
  - Category
  - Support Languages
  - Support Level
  - Supervisor assignment
- Admins can **activate or deactivate** an agent or supervisor anytime.



Add Users via Excel Upload

Steps:

1. Download the provided **Excel template**.
2. Fill in all required fields.
3. For **Category/Language**, enter values that need to be mapped to the agent.
4. Upload the filled Excel file back to the system.

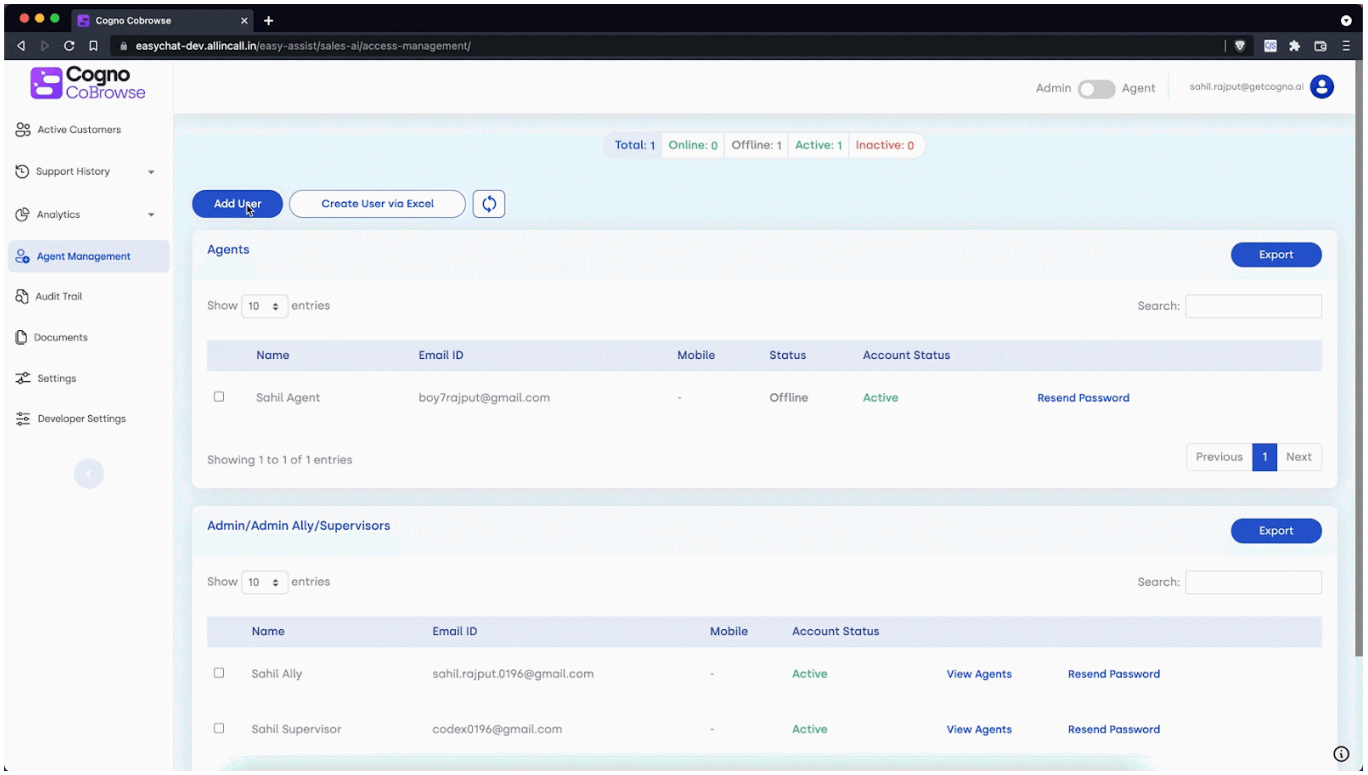


Agent Levels & Roles

Levels of Agents

- **L1 Agents** → Assigned leads automatically when online.
- **L2 / L3 Agents** → Not assigned leads automatically, but can be **invited into sessions** by L1 agents.
- **Experts** → Not auto-assigned leads; only join when invited.

Path: CoBrowsing → Agent Management → Add User → Select Level (L2/L3/Expert)



Roles in CoBrowsing

- **Admin** → Full access across the console.
- **Supervisor** → Manages agents, transfers leads, and monitors sessions.
- **Admin Ally** → Supervises Supervisors, with visibility into the activities of agents and supervisors.

Admin Ally special view → An extra column “Supervisor” is added across:

- Active Customers

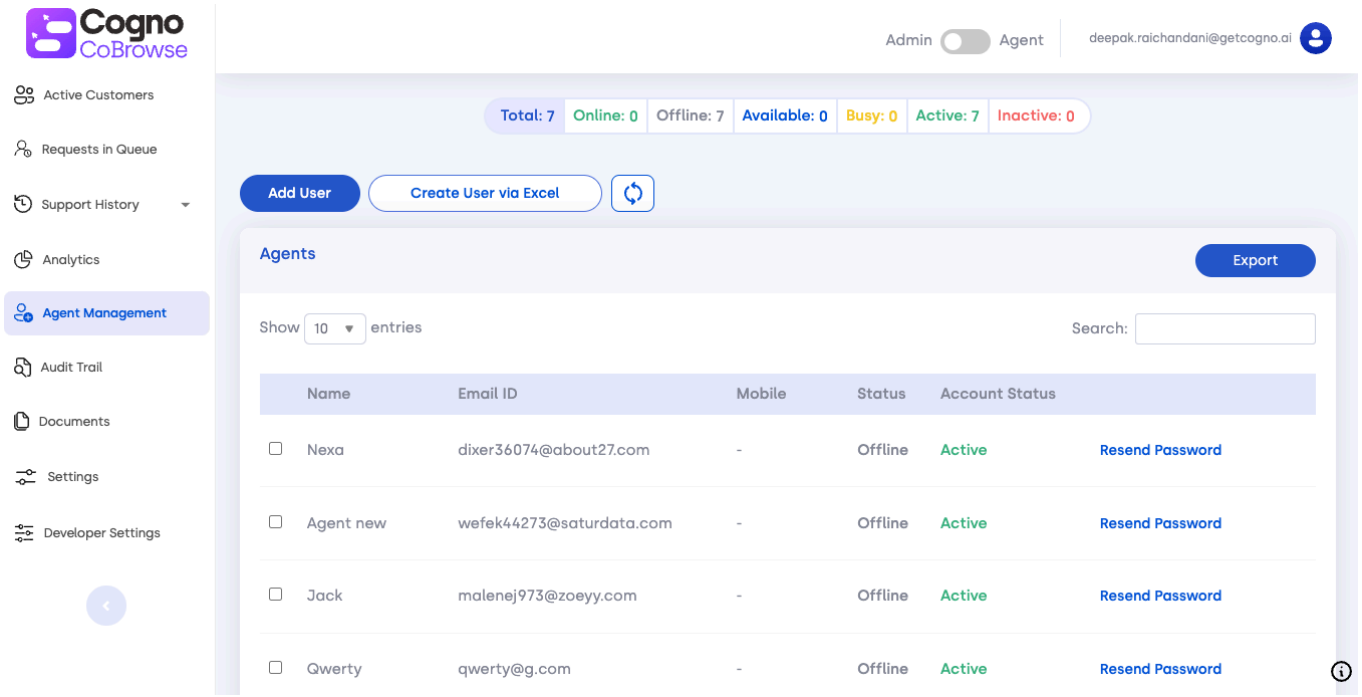
- Support History
- Analytics
- Audit Trail

To add an Admin Ally: CoBrowsing → Agent Management → Add User → Select Admin Ally

Exporting Agent Reports

Admins can generate detailed reports of all users.

Path: CoBrowsing → Agent Management → Export



Export Features

- **Agent Report** → Downloads details of agents (created, active, deactivated).
- **Supervisor/Admin Ally Report** → Downloads corresponding user details.

The report includes:

- User Name
- Role (Agent/Supervisor/Admin Ally)
- Category & Language support
- Activity logs

- Activation & Deactivation dates
- Current status (Active/Inactive)

***Notes**:*

- Export reflects the **latest values** at the time of download.
- Only the selected role's data will be exported (e.g., Agent Export won't include Supervisors).

12.2.4.5. Audit Trail

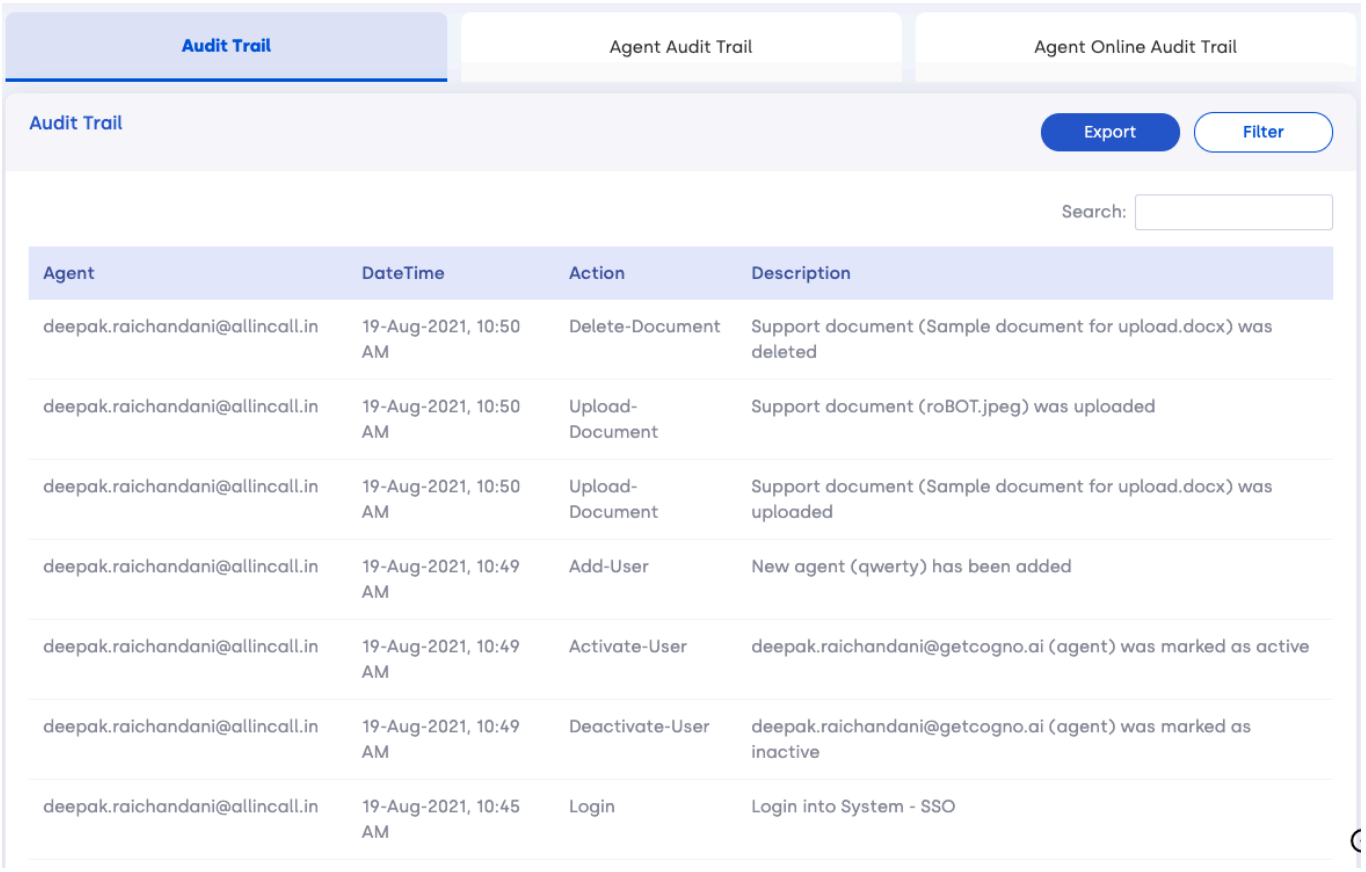
The **Audit Trail** section in CoBrowsing provides a complete log of actions performed in the system. It is designed to give Admins full visibility into all activities and configuration changes, ensuring transparency, compliance, and accountability.

Path: CoBrowsing Console → Audit Trail

What is Audit Trail?

The **Audit Trail** is a chronological record of all activities performed by users (Admins, Supervisors, Agents) in the console.
It allows organizations to:

- Track **who did what, when, and how**.
- Ensure **accountability** of sensitive actions.
- Maintain compliance with internal/external audit requirements.



Activities Captured in Audit Trail

The Audit Trail captures all major actions, including but not limited to:

- **Document Management**
  - Document upload
  - Document delete
- **User Management**
  - Add Agent
  - Activate Agent
  - Deactivate Agent
- **Security**
  - Change Password

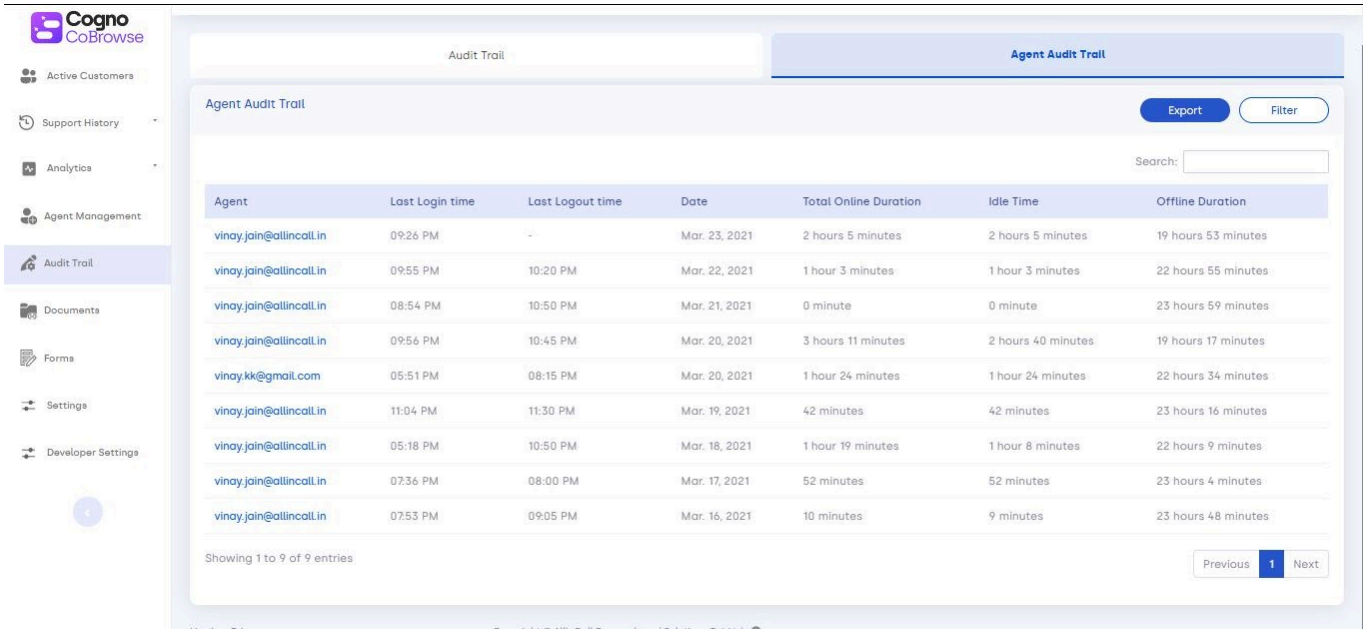
Every entry includes:

- **User Name / Role** (Admin, Supervisor, Agent)
- **Action Performed**
- **Timestamp**
- **Status/Result** of the action

Agent Audit Trail

The **Agent Audit Trail** provides Admins and Supervisors with a complete log of **login and logout durations** of all agents. It helps track agent availability and overall activity patterns during the day.

Path: CoBrowsing Console → Audit Trail → Agent Audit Trail



Features

1. **Track Login/Logout Durations**
    - Every login and logout instance for each agent is recorded.
    - Displays timestamps along with the duration for which the agent stayed online.
2. **Agent-Wise Audit Logs**
    - By clicking on an **Agent's email ID**, Admins can view the detailed login/logout history for that specific agent.
    - Helps in monitoring an agent's availability throughout the day.
3. **Daily Tracking**
    - Admins can see complete session-wise logs for an agent for any given day.

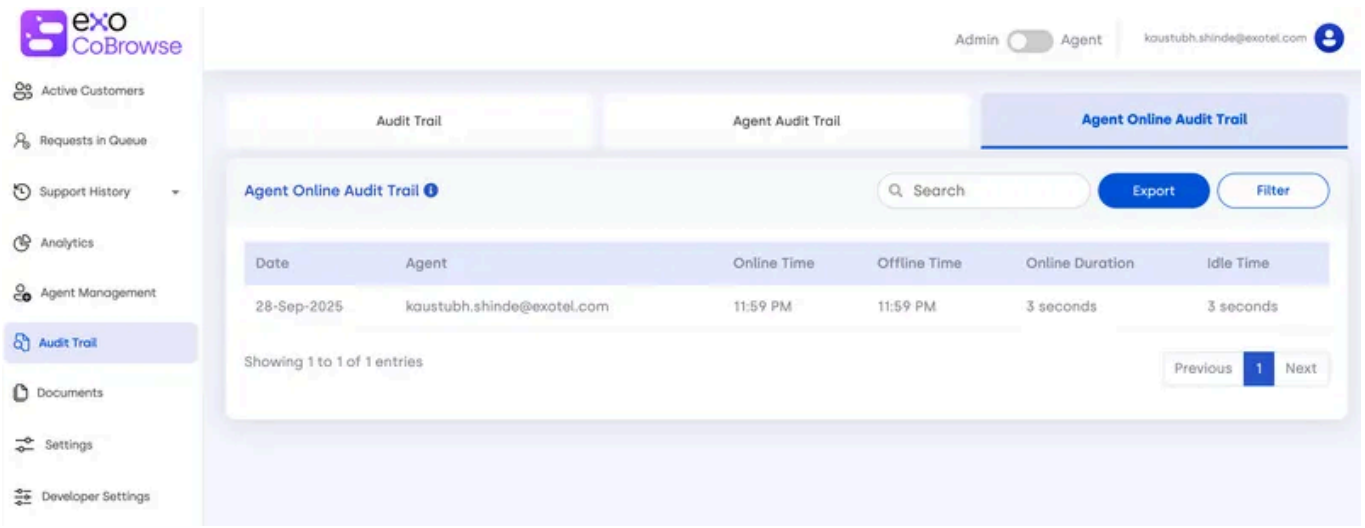
Agent Online Audit Trail

The **Agent Online Audit Trail** provides a complete record of agents' **online, offline, and idle times** throughout the day. This allows Admins and Supervisors to track availability and ensure agents are utilizing their time effectively.

Path: CoBrowsing Console → Audit Trail → Agent Online Audit Trail

Features

1. **Real-Time Availability Tracking**
    - Logs when agents toggle **online** or **offline**.
    - Tracks **idle time** when agents are online but not actively in a session.
2. **Full-Day Logs**
    - Admins and Supervisors can view detailed agent activity timelines for the entire day.
    - Provides visibility into patterns such as frequent logouts or extended idle periods.
3. **Export Reports**
    - Export all agent availability logs into a **single consolidated file**.
    - Reports include detailed metrics for each agent's online, offline, and idle status.



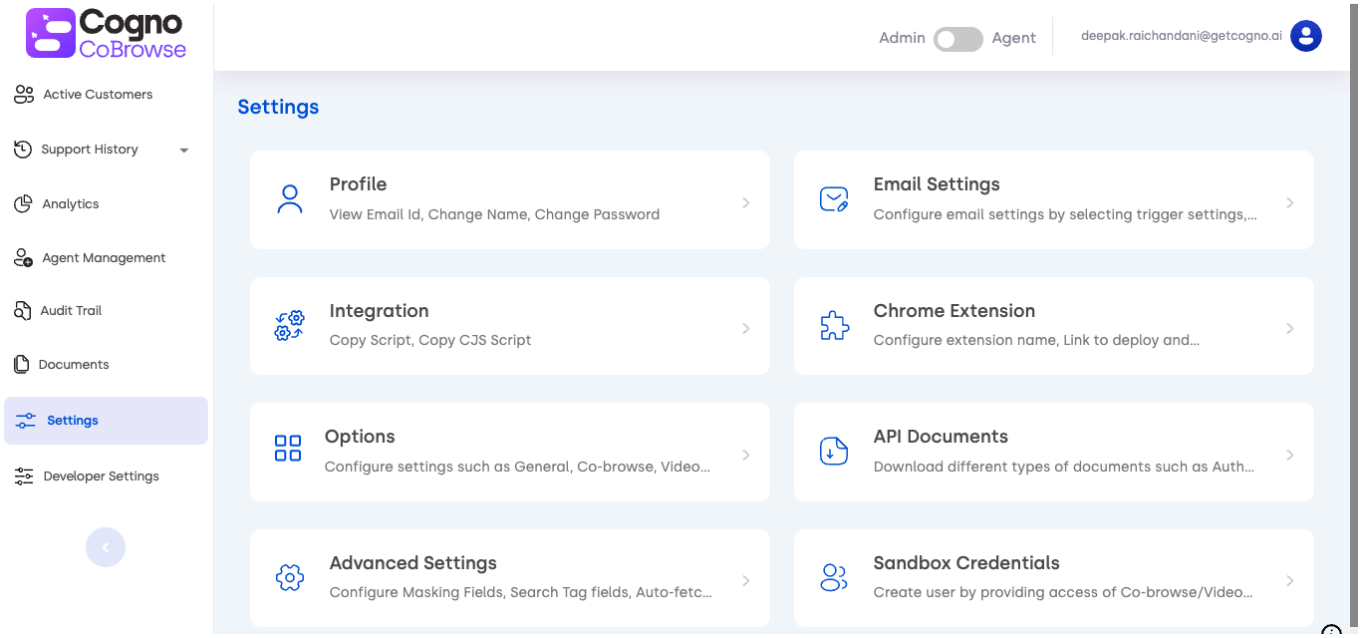
Data Captured

Column	Description
Agent Name / Email	The name and email ID of the agent
Online Time	Timestamp when the agent came online
Offline Time	Timestamp when the agent went offline
Idle Duration	Total time the agent stayed idle while being online
Online Duration	Total time the agent was actively engaged in sessions

12.2.4.6. Settings

The **Settings** section in the CoBrowsing console provides configuration options for Admins, Admin Allies, Supervisors, and Agents. It allows organizations to customize how CoBrowsing operates, control lead assignments, configure toggles, and manage advanced features.

Path: CoBrowsing Console → Settings

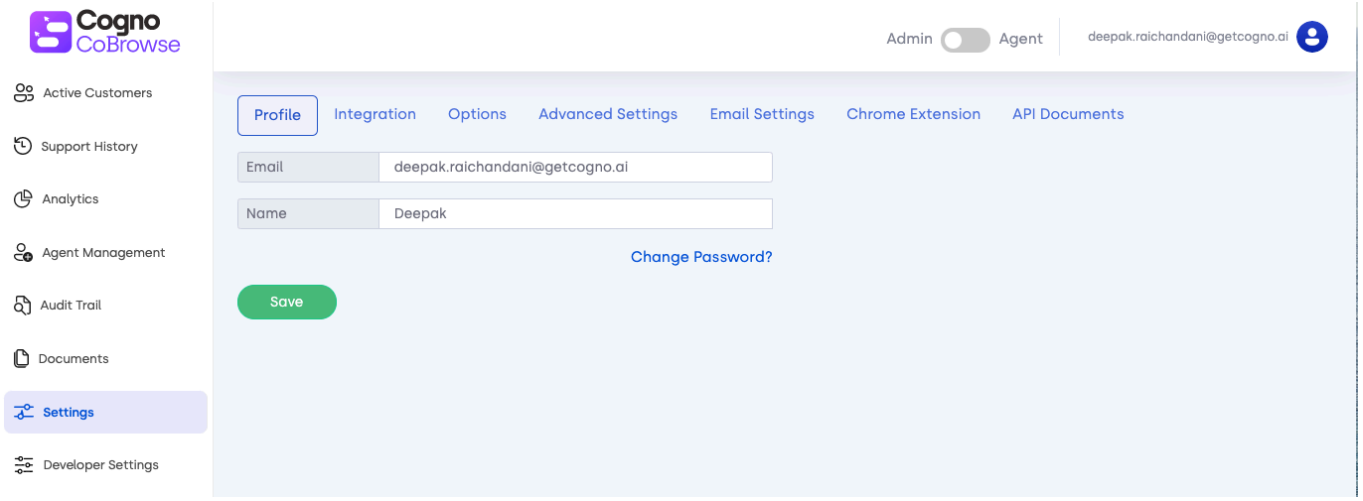


12.2.4.6.1. Profile

Profile

The **Profile** section under Settings allows Admins (and other users depending on their role) to view and manage their account details. It ensures that each user has access to their personal information and the ability to update security credentials.

Path: CoBrowsing Console → Settings → Profile



12.2.4.6.2. Email Settings

Email Settings

The **Email Settings** section allows Admins and other console users to configure and receive **periodic email reports** on CoBrowsing analytics and performance. These emailers help provide insights without needing to log in to the console, making it easier to track activity trends over time.

Path: CoBrowsing Console → Settings → Email Settings

Enabling Email Analytics

- Navigate to **Email Settings**.
- Toggle **Enable Emailers:** ON.
- Once enabled, all customization fields become visible.
- Emailers can then be tailored by **profile, frequency, format, and content.**

Customization Categories

There are **five major categories** available for customizing email reports:

1. **Profiles**

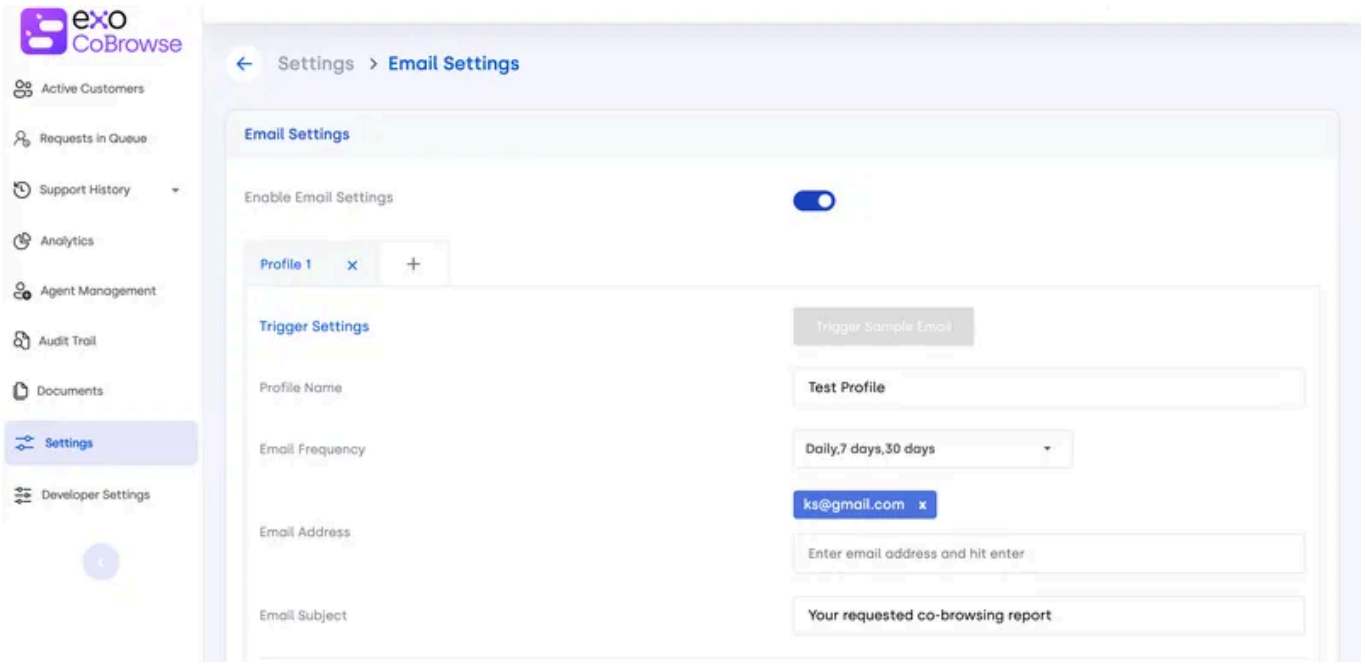
- Each profile can have **unique configurations** for email triggers.
- Customizable fields:
    - Target **Email Addresses**
    - **Subject Lines**
    - **Trigger Settings**

2. **Trigger Settings**

Defines how and when emails are sent.

- **Email Frequency:** Multi-select options:
    - Daily
    - 7 days

    - 30 days
    - 60 days
    - 90 days
- **Email Address:**
    - One or more recipient email IDs.
    - Reports are delivered to the listed addresses.
- **Email Subject:**
    - Custom subject line for the mail.
- **Trigger Email Sample:**
    - Sends a test mail to the configured email ID to verify setup.

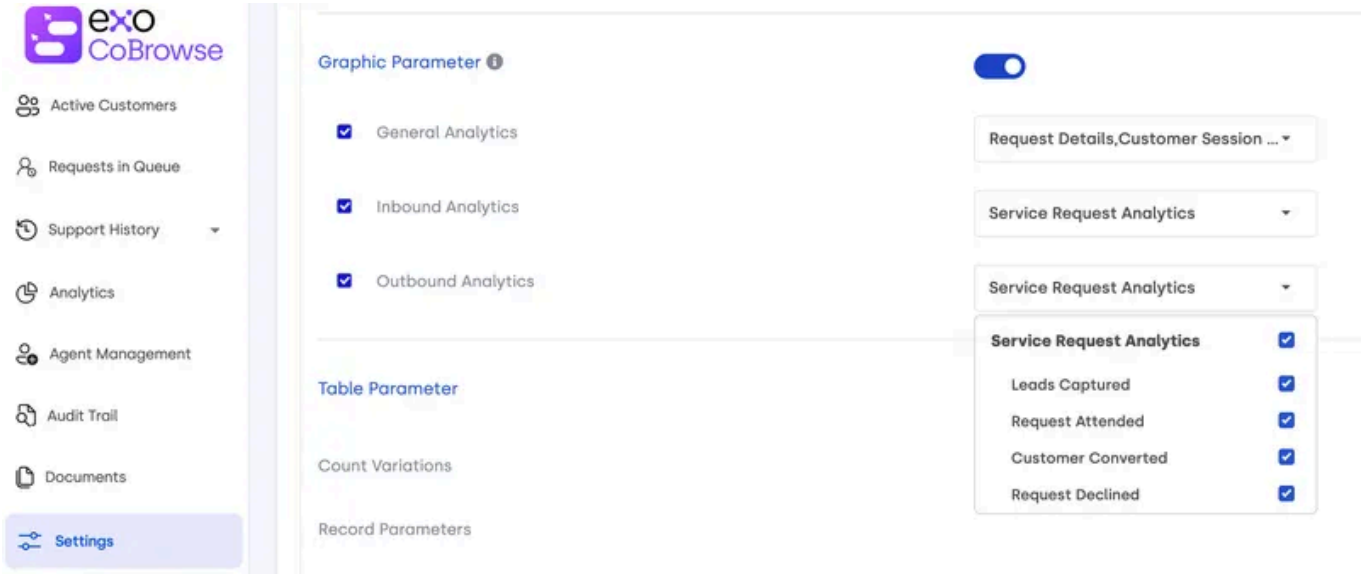


3. **Graphics Parameter**

Adds **visual analytics** to email reports for better readability and user experience.

Supported graphics:

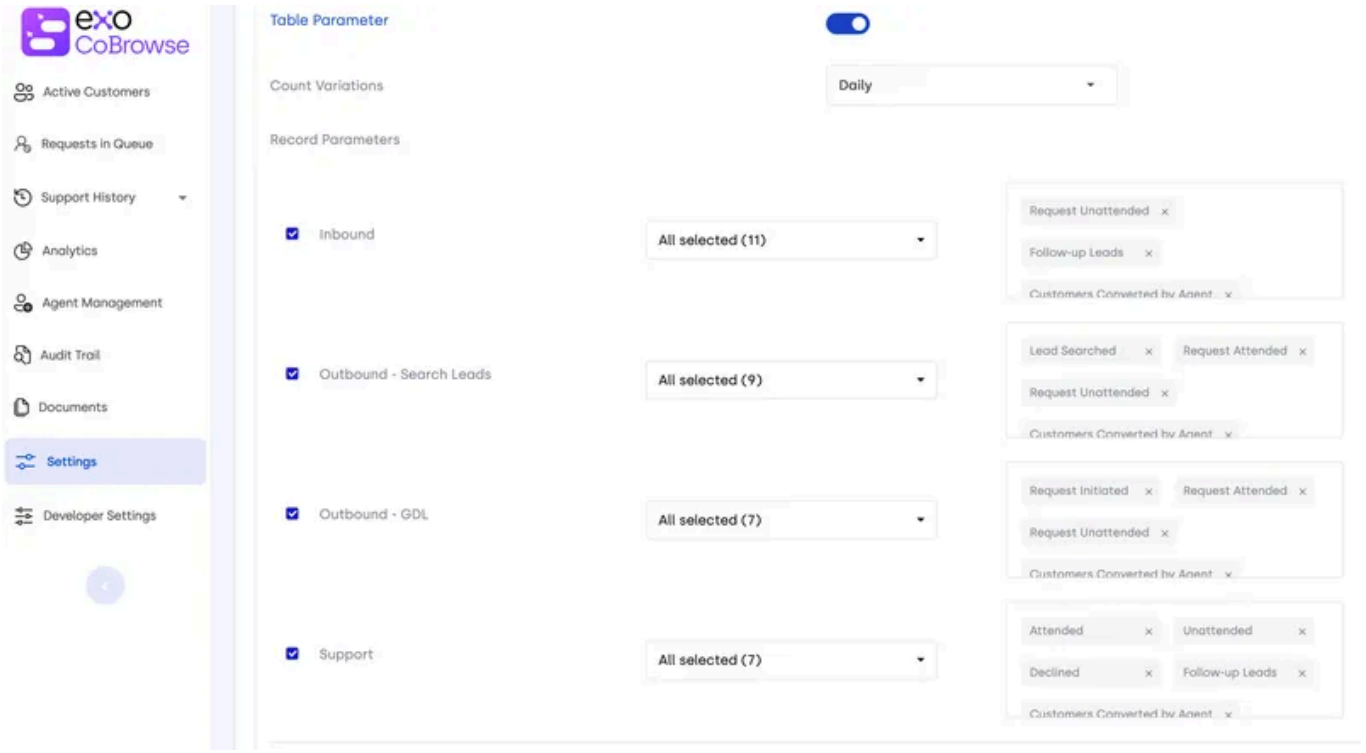
- General Analytics
- Inbound Analytics
- Outbound Analytics



4. **Table Parameter**

Defines **how data values are shown in tabular format** inside email reports.

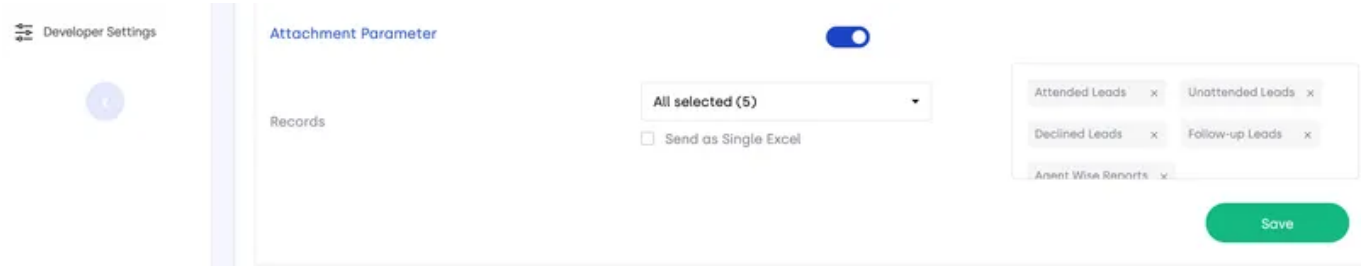
- **Count Variation Options**:
  - **Daily:** Count on the trigger day.
  - **WTD** (Week to Date): Count from the start of the week to the trigger day.
  - **MTD** (Month to Date): Count from the start of the month to the trigger day.
  - **YTD** (Year to Date): Count from the start of the year to the trigger day.



5. **Attachment Parameter**

Admins can configure **attachments** to include detailed reports.

- **Attended Leads:** Session details of attended leads.
- **Unattended Leads:** Leads that were captured but not attended.
- **Declined Leads:** Leads where customers declined to connect.
- **Follow-Up Leads:** Leads requiring follow-up action.
- **Agent Wise Reports:** Per-agent performance reports, showing client handling breakdown.



12.2.4.6.3. Integrations

This section explains how to add the CoBrowsing client scripts (HTML + CJS) to a customer website so the CoBrowsing widget and sessions can be initiated. It covers the required snippet(s), placement, common initialization options, best practices, testing, and troubleshooting.

Path in console: CoBrowsing Console → Settings → Integration
From there, you can copy the exact HTML and CJS snippets tailored for your account.



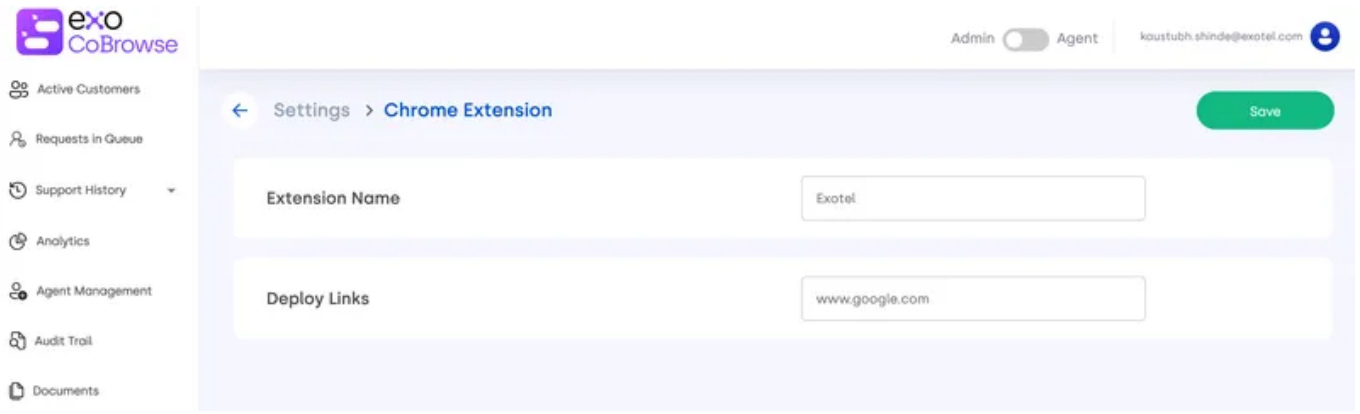
Prerequisites

- You must have an active CoBrowsing account and the client-specific snippet available in the console (contains your org/client identifier).
- Confirm which CoBrowsing approaches you're enabling (Inbound, Outbound, Reverse, Proxy). Some approaches require additional server-side or gateway configuration.
- Ensure the pages where CoBrowsing will work are served over **HTTPS**.
- Confirm browser compatibility (latest Chrome/Firefox/Edge/Safari recommended).
- If your site has a strict Content Security Policy (CSP), plan to add the CoBrowsing host(s) to script-src and connect-src.

12.2.4.6.4. Chrome Extension

Many clients prefer not to use a separate CoBrowsing console and instead want the solution integrated directly within their existing **internal CRM**. To address this, CoBrowsing offers a **Chrome Extension module**, enabling seamless integration into the client's CRM environment.

Path: CoBrowsing Console → Settings → Chrome Extension



Why Use the Chrome Extension?

- Eliminates the need to switch between the CRM and CoBrowsing console.
- Embeds CoBrowsing capabilities directly into the client's internal tools.
- Offers the same session features while improving agent productivity.

Steps to Create and Install the Chrome Extension

1. **Access Settings**
    - Navigate to:
      Admin Dashboard → Settings → Chrome Extension
2. **Enter Extension Details**
    - Provide an **Extension Name** (e.g., *CognoAI*).
    - Enter the **Website URL** where the extension should be active (client's CRM URL).

3. **Save & Download**
    - Save the details.
    - Download the generated Chrome extension package.
4. **Install in Browser**
    - Open Chrome → go to **Settings** → **Extensions**.
    - Enable **Developer Mode** (top-right toggle).
    - Click **Load Unpacked** (top-left corner).
    - Upload the downloaded extension folder.
5. **Verify Installation**
    - Refresh the target website (CRM).
    - The CoBrowsing extension widget will now be visible at the **bottom-right** of the page.

Notes

- The extension only works on the **configured website URL(s)**.
- Admins can create multiple extensions for different environments (e.g., Staging, Production CRMs).
- Updates to the extension configuration require **re-downloading and reloading** the extension.

12.2.4.6.5. Options

The **Options tab** under Settings allows Admins to configure all CoBrowsing-related settings across **General, CoBrowsing, Video Call, and Calendar**.

This section covers **General Options**, which are the most exhaustive and apply to all CoBrowsing use cases.

Path: CoBrowsing Console → Settings → Options → General

General Options

Cobrowse Options

Calendar Options

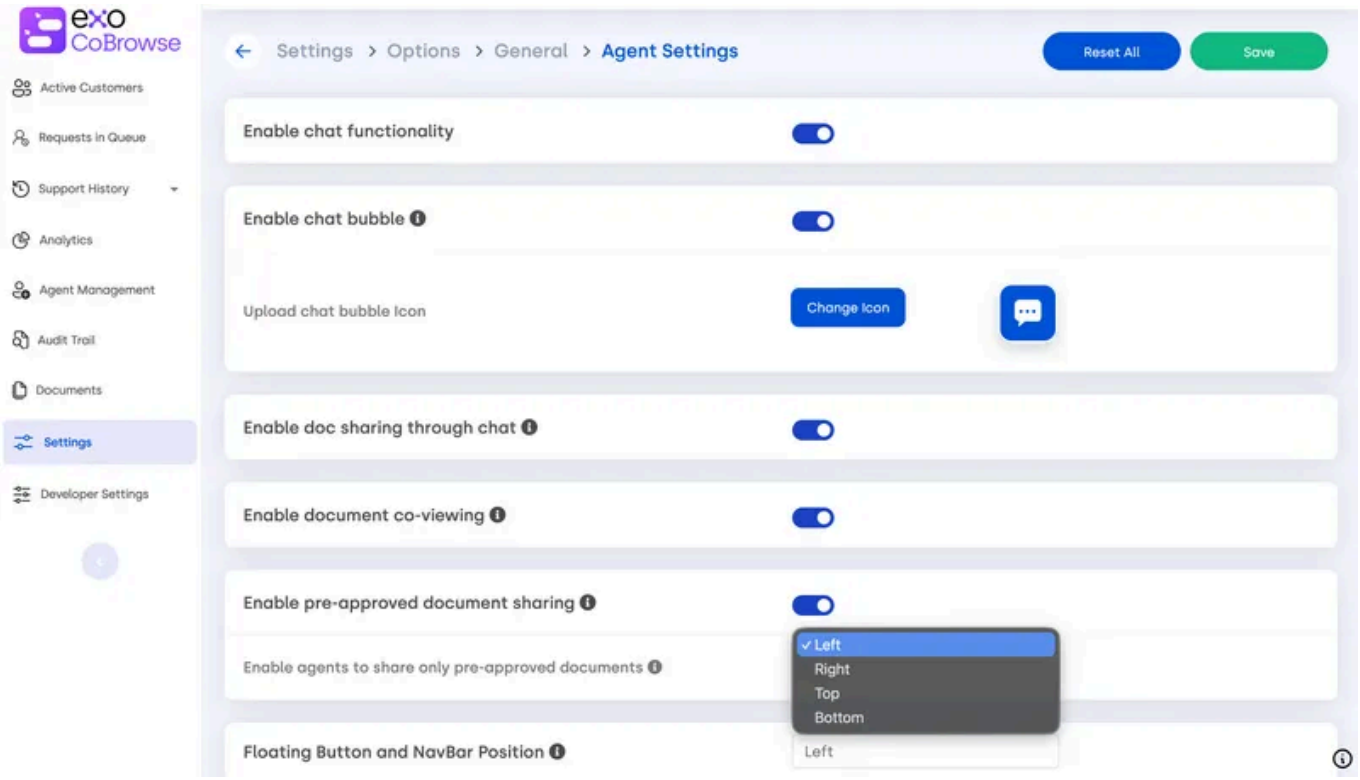
12.2.4.6.5.1. General Options

Agent Settings

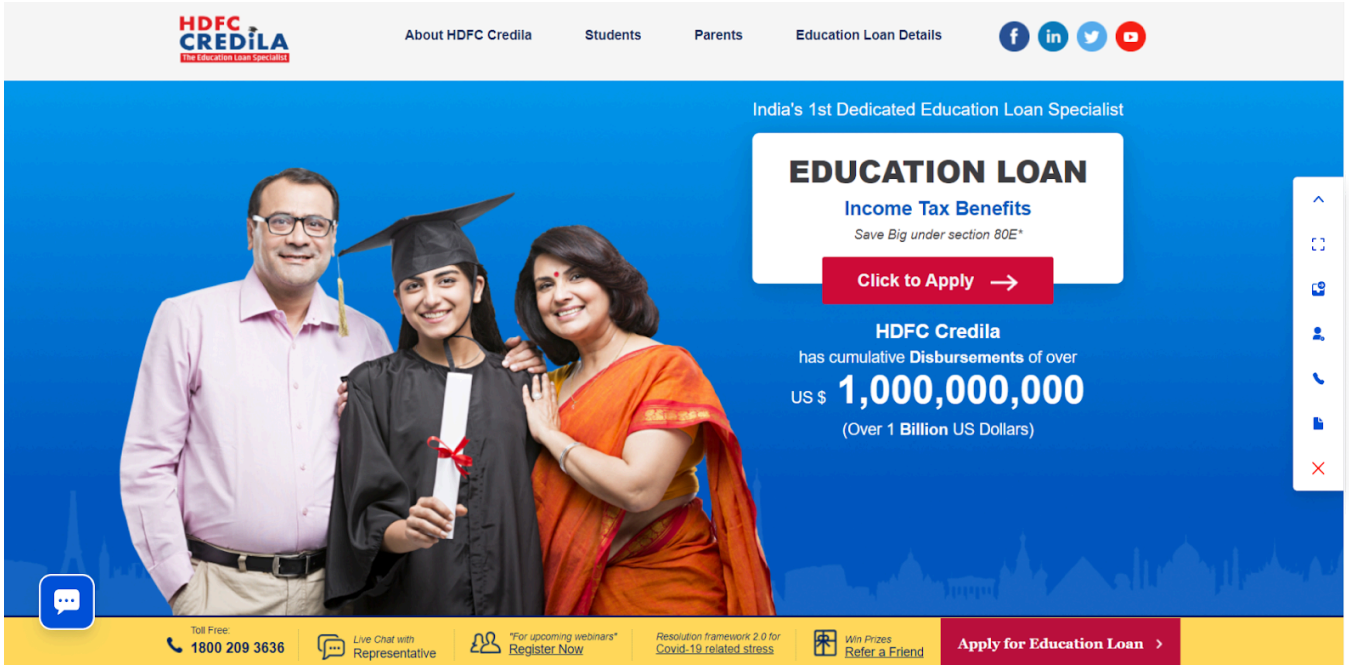
Navigation Bar

- Admin can configure the **Navigation Bar and Floating Button position**.
- Positions available: **Left, Right, Top, Bottom**.
- For the **Right NavBar**, the Chat Bubble/Window opens on the **left edge**.
- **Mobile Limitations**: Chat Bubble not available; only the NavBar is shown.

Path: Settings → Options → General → Agent Settings → Navigation Bar → Floating Button & NavBar Position



- When the NavBar & Chat Bubble is set to **Right**



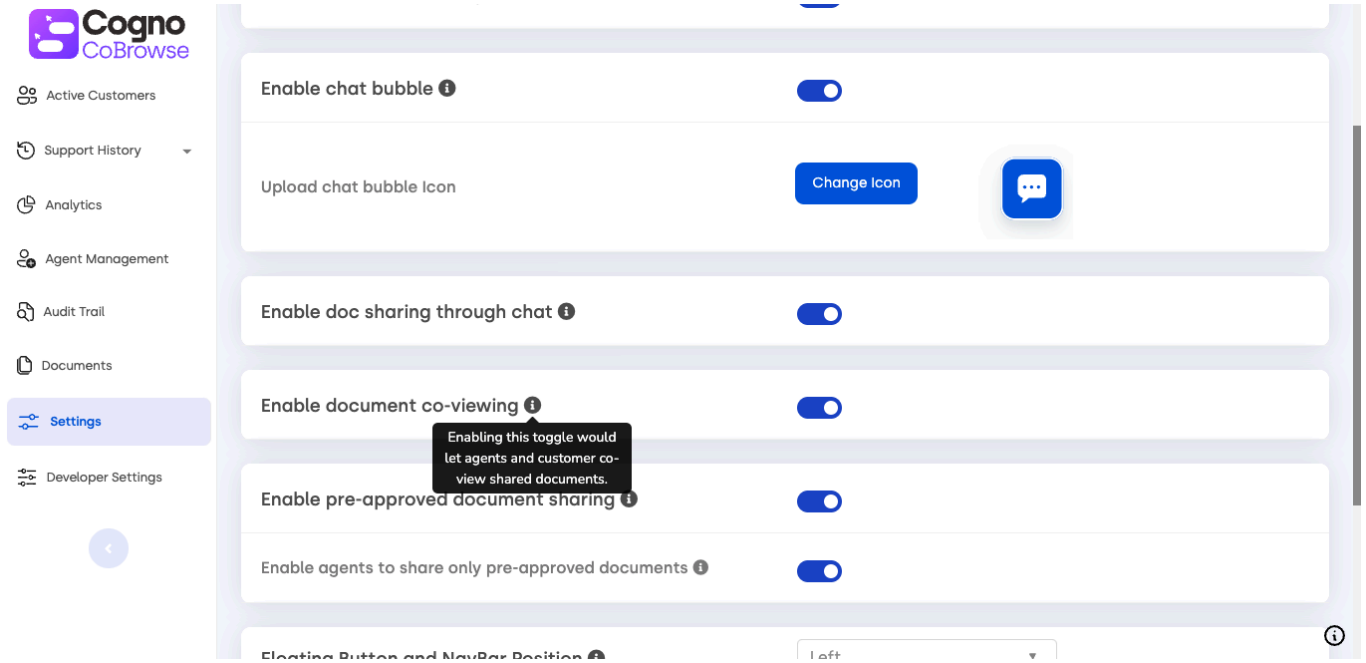
Limitations:

- The floating button position dropdown (in Inbound settings) is removed.
- The Top/Bottom NavBar has **no minimized state**.
- If Floating Button is off but the Icon is on → setting shows only the *NavBar Position*.

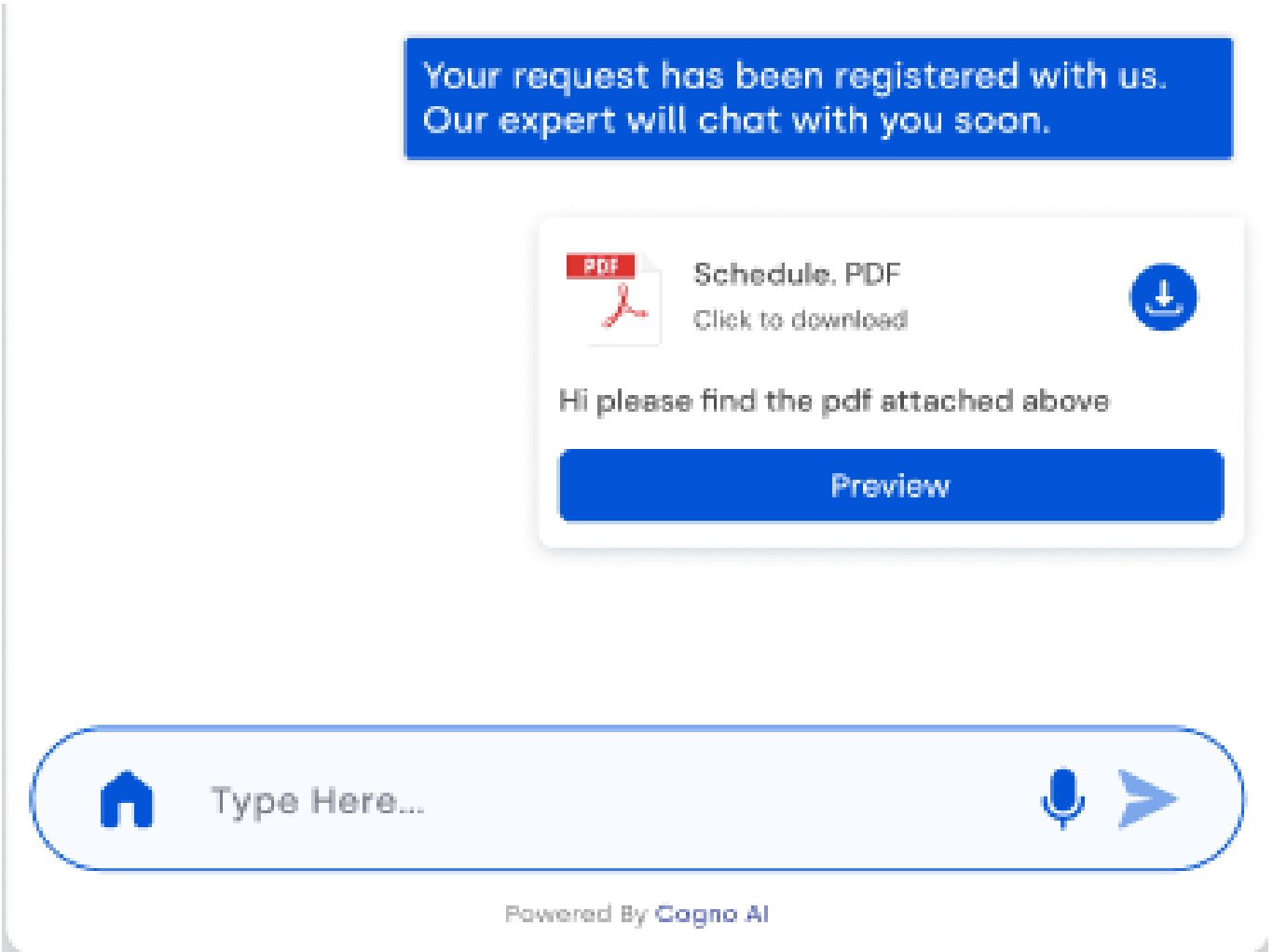
Document Co-View

- Toggle to **enable/disable PDF sharing & co-viewing**.
- Agents can only share **pre-approved documents** (if enabled).
- **Attachment Sharing** option available via chat.

Path: Admin Console → Settings → Options → General → Agent Settings → Document Co-View



If the "Enable doc co-viewing" toggle is enabled, the PDFs can be shared over CoBrowse Live Chat and co-viewed. Clicking on "**Preview**" will allow co-viewing of the PDF document.



Please note that when the toggle is disabled, the preview button is not displayed with the card.

Auto Offline Agents

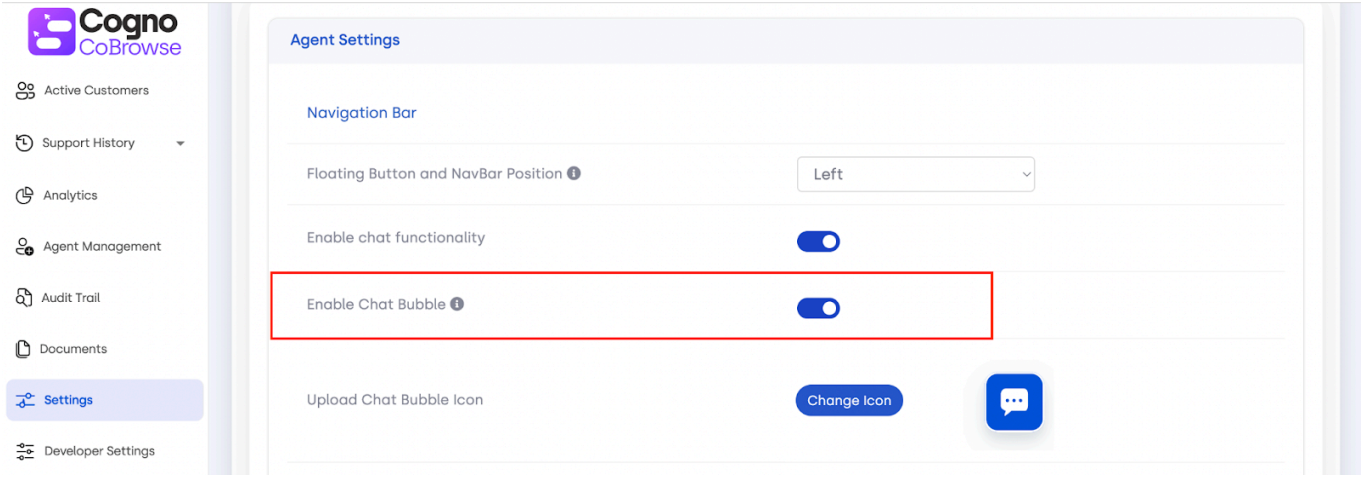
- Auto marks agents **offline after inactivity**.
- If the toggle is enabled, the agent will be marked offline after some time of inactivity. By default, this toggle will be enabled.
- **Note**: If the first option is turned on, the attachment icon will only be visible on the customer's end.

Path: Settings → Options → General → Agent Settings → Auto Offline Agent

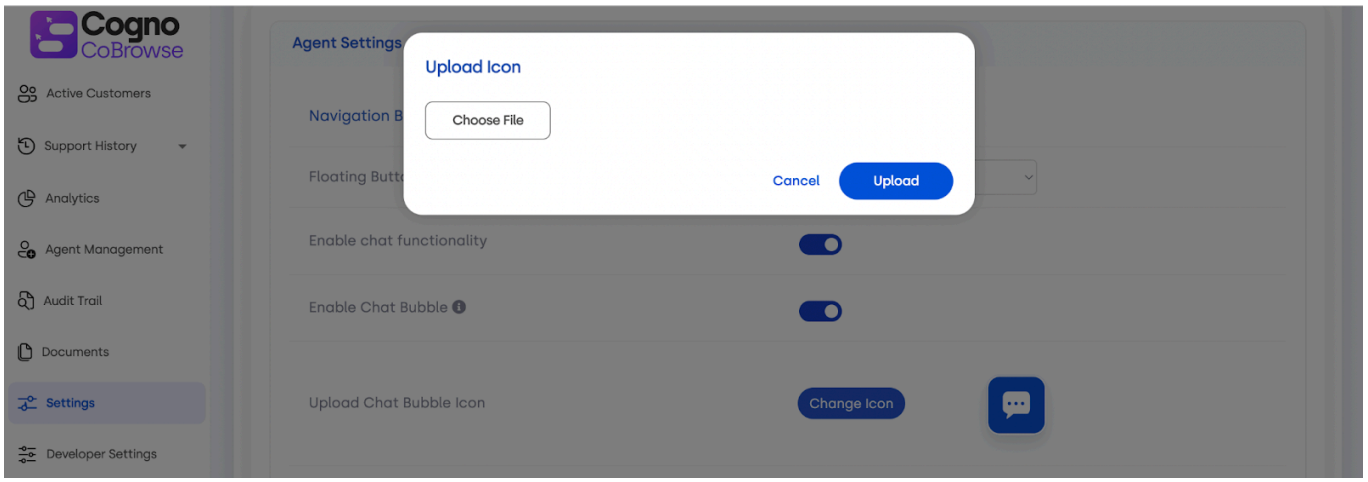
Enable Chat Bubble

- Allows agents/customers to **minimize chat in a bubble**.
- Supports **custom icons** (.png/.svg <30KB).
- Shows a **greeting bubble** when new messages arrive.

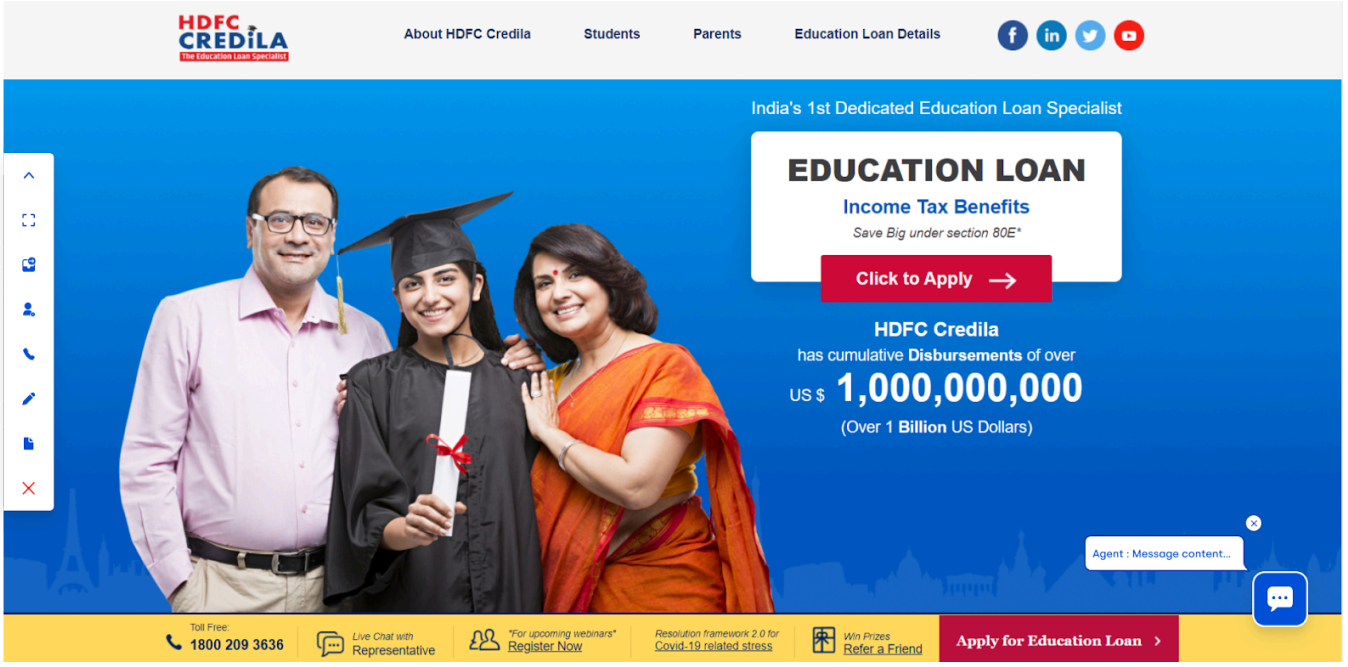
Path: Settings → Options → General → Agent Settings → Navigation Bar → Enable Chat Bubble



- The user can upload their own icon in .png or .svg format. To do so, users can click on the "Change Icon" button.
- Only files with .png and .svg extensions are allowed.



- Once the chat bubble is enabled, the chat option wouldn't be visible inside the NavBar when the agent and customer connect in a session. It would now be visible as a chat bubble. Users can click on the bubble to open the chat window and minimize the window to the bubble again.
- New messages from the customer/agent would be displayed as a greeting bubble on the chat bubble if the chat window is already in a minimized state. As shown in the image below.
- Users can click on the associated cross icon to close the bubble. Clicking on the greeting bubble will open the chat window.
- This is applicable to inbound, outbound, and Reverse CoBrowsing (All types of CoBrowsing).



Limitations:

- **Mobile Support**
  - Chat bubble is **not available on mobile devices**.
  - On mobile → chat is always accessed via NavBar.
- **Fallback when Disabled**
  - If toggle is **OFF** → chat is accessible from NavBar only.
  - In this case, users can only **close** the chat window, not minimize it.
- **Icon Restrictions**
  - Maximum file size for uploaded icons = **30 KB**.
  - Only .png and .svg files are accepted. All other formats are unselectable.
- **Message Display in Greeting Bubble**
  - In case of **multiple unread messages**, only the **latest message** is displayed.
  - Earlier messages remain unread but are not shown in the bubble preview.
- **Search Lead Sessions**
  - Since customer names are not always captured during Search Lead sessions:
    - Instead of the Customer's FirstName, the **UserType label** (e.g., "Customer") will be displayed when showing new message notifications.
- **Visual Adjustments**
  - The chat bubble inherits the **console's theme color** for borders/text when customized by the admin.

Agent Profile Picture

Allows agents to upload and display profile pictures.

- Toggle for enabling agent profile picture upload (.png, .jpeg, .jpg formats).
- Admin controls are enabled from the console.
- Once the toggle is enabled from the Admin side, the Agent will be able to upload a profile picture from CoBrowse (Agent) > Settings > Profile section.
- Greeting bubble can be enabled for "Request for Support" buttons, customizable popup time, and text (up to 100 characters).

Limitations:

- Greeting bubble settings apply only to inbound support and contact scenarios.

Bubble text and color are restricted by console theme choices.

Admin Settings

General

- Greeting bubble can be enabled for "Request for Support" buttons, customizable popup time, and text (up to 100 characters).
- You can configure Greeting bubble text & Auto PopUp timer.

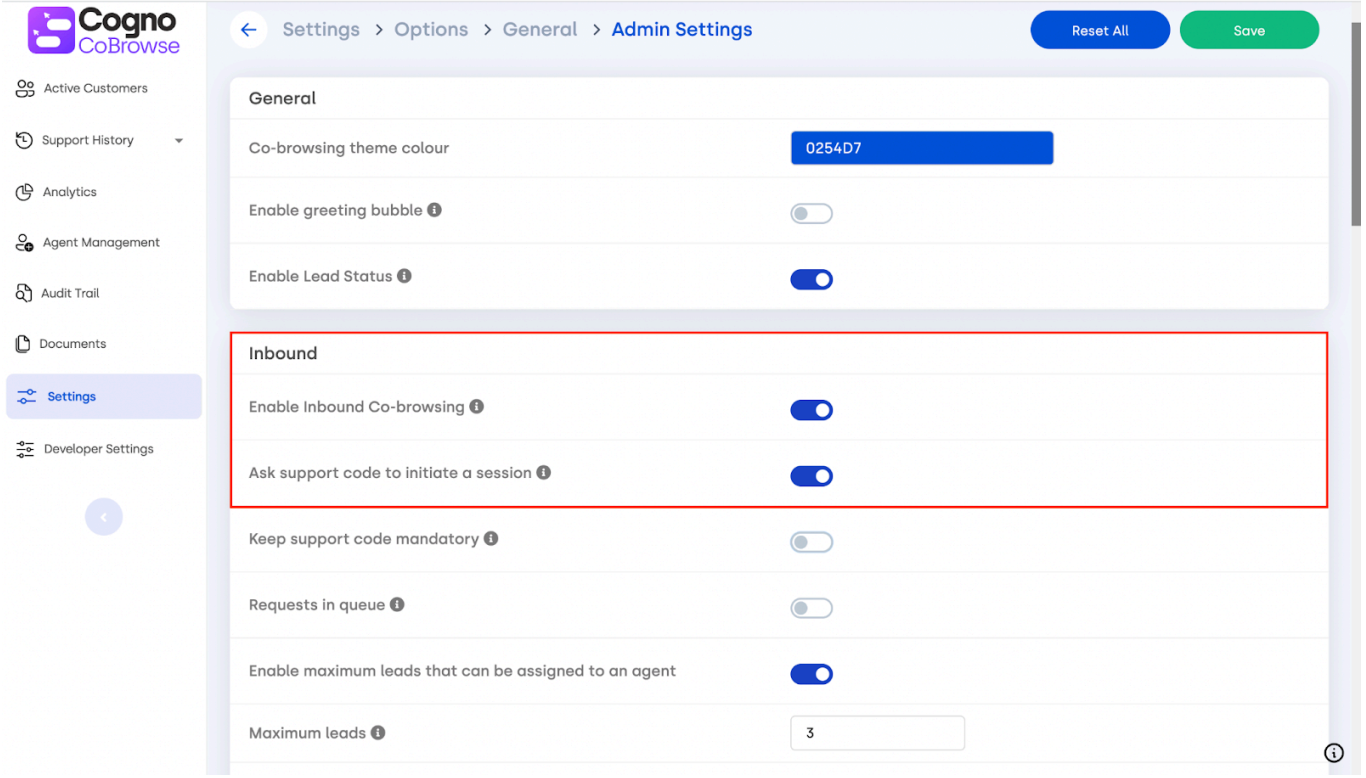
Limitations:

- Greeting bubble settings apply only to inbound support and contact scenarios.
- Bubble text and color are restricted by console theme choices.

Inbound

- **Enable inbound co-browsing:** Toggle provided to enable inbound co-browsing. This is not enabled by defalut.
- **Ask support code to initiate a session:**
    - Provided a toggle in the frontend for modified inbound approach in admin settings. By default, this will be disabled.
    - If this toggle is enabled all customers would need a unique support code from agents to connect on inbound support requests.
    - A dynamic support code would be displayed on the agent "Active Customers" dashboard, which shall automatically change after the end of every inbound session.
    - Agents can share support code with the customers and customers must enter it along with their details inside the request for support modal to initiate a support

request which will be directly assigned to the agent whose support code has been entered by the customer.



- **Keep support code mandatory**: Enabling this will make the support code mandatory for customers to initiate an inbound support request.

Requests in Queue

- **Path:** Settings → Options → General → Admin Settings → Inbound → Requests in queue
- **What It Does:** Enables a queue of unassigned inbound session requests for viewing and manual assignment by agents/admins.
- **How to Use:** Toggle ON. Agents can select "Assign to Me" on open leads.
- **Effect:** Switches from auto-assignment to manual assignment.
- **Limitations:** Only one logic (manual vs auto) can be enabled at once; disables auto-assignment features.

Enable Maximum Leads That Can Be Assigned to an Agent

- **Path:** Settings → Options → General → Admin Settings → Inbound → Enable maximum leads that can be assigned to an agent

- **What It Does:** Enforces a cap on open leads per agent.
- **How to Use:** Toggle ON, then fill in the numeric field for "Maximum leads."
- **Effect:** If an agent reaches this limit, further leads are assigned to others or kept queued.
- **Limitations:** Lead cap applies organization-wide; max value configurable by admin.

Maximum Leads

- **Path:** Settings → Options → General → Admin Settings → Inbound → Maximum leads
- **What It Does:** Numeric field to set the maximum simultaneous leads for agents.
- **How to Use:** Enter number (e.g., 3).
- **Effect:** Enforced together with the above toggle.
- **Limitations:** Applies only when previous toggle is ON.

Display Floating Button to "Connect with an Agent"

- **Path:** Settings → Options → General → Admin Settings → Inbound → Display floating button to "Connect with an agent"
- **What It Does:** Shows a floating button on the website to initiate chat/cobrowse sessions.
- **How to Use:** Toggle ON to display button for support requests.
- **Effect:** Button appears where configured in theme.
- **Limitations:** Placement depends on admin configuration; mobile behavior differs.

Display Icon to "Connect with an Agent"

- **Path:** Settings → Options → General → Admin Settings → Inbound → Display icon to "Connect with an agent"
- **What It Does:** Shows an icon (instead of button) to initiate support.
- **How to Use:** Toggle ON.
- **Effect:** Icon appears in chosen location. If both button and icon options are enabled, their placement may differ.
- **Limitations:** If only icon is enabled, floating button-based settings do not apply.

Change Icon Position

- **Path:** Settings → Options → General → Admin Settings → Inbound → Change icon position
- **What It Does:** Sets the screen location for the "Connect with an agent" icon (e.g., left, right, coordinates).
- **How to Use:** Enter numeric value or select desired location.
- **Effect:** Icon/button moves to specified position.
- **Limitations:** Not all combinations supported; interaction with NavBar/floating settings.

Display "Connect with an Agent" Button Only if Agents Are Available

- **Path:** Settings → Options → General → Admin Settings → Inbound → Display "Connect with an agent" button only if agents are available
- **What It Does:** Hides the request button/icon if no agents are online.
- **How to Use:** Toggle ON.
- **Effect:** Only shows support to customers when agents can respond.
- **Limitations:** If all agents are busy, button/icon is hidden instead of disabled.

Disable "Connect with an Agent" Button If Agents Are Unavailable

- **Path:** Settings → Options → General → Admin Settings → Inbound → Disable "Connect with an agent" button if agents are unavailable
- **What It Does:** Disables (greys out) the request button/icon if agents are unavailable.
- **How to Use:** Toggle ON.
- **Effect:** Customers see a disabled button rather than hiding it.
- **Limitations:** Choose between this and the previous toggle; both cannot be enabled.

Enable Non-working Hours Popup

- **Path:** Settings → Options → General → Admin Settings → Inbound → Enable non-working hours pop up
- **What It Does:** Opens a modal to collect user info during non-working hours, sending leads directly to the follow-up queue.
- **How to Use:** Toggle ON.
- **Effect:** Leads generated outside business hours are marked for follow-up.
- **Limitations:** Only one non-working hours logic applies; customizable working hours and days in related settings.

Enable Follow up Leads

- **Path:** Settings → Options → General → Admin Settings → Inbound → Enable follow up Leads
- **What It Does:** Activates the "Follow Up" leads tab for better lead lifecycle management.
- **How to Use:** Toggle ON.
- **Effect:** Leads requiring follow-up are tracked in a dedicated section.
- **Limitations:** Applies to leads generated out of hours, failed assignments, etc..

Enable Tag Based Assignment for Inbound

- **Path:** Settings → Options → General → Admin Settings → Inbound → Enable tag based assignment for inbound
- **What It Does:** Assigns inbound leads based on product categories/tags.
- **How to Use:** Toggle ON and add/manage categories.
- **Effect:** Leads are routed by product category.
- **Limitations:** Categories must be managed separately; impacts analytics visibility.

Enable Language Support

- **Path:** Settings → Options → General → Admin Settings → Inbound → Enable language support

- **What It Does:** Supports grouping and auto-assignment by supported languages.
- **How to Use:** Toggle ON and configure language list.
- **Effect:** Customers select language; leads go to matching agents.
- **Limitations:** Must be maintained actively; unlisted languages not routed.

Message to be Shown on "Connect with Our Experts" Modal

- **Path:** Settings → Options → General → Admin Settings → Inbound → Message to be shown on "Connect with our experts" modal
- **What It Does:** Sets the message shown to customers on the support modal.
- **How to Use:** Enter desired message text.
- **Effect:** This appears when customers access support.
- **Limitations:** Limited by character count/file:1].

Toasts and Timers

No Agent Connects Session Toast

- **Path:** Settings → Options → General → Admin Settings → Inbound → No agent connects session toast
- **What It Does:** Shows a toast message if an agent does not connect within the expected time.
- **How to Use:** Toggle ON. Set timer and message below.
- **Effect:** Customer receives configured notification.
- **Limitations:** Toast message editable only in this setting.

No Agent Connects Session Toast Time (in mins)

- **Path:** Settings → Options → General → Admin Settings → Inbound → No agent connects session toast time (in mins)
- **What It Does:** Timer for how long to wait before showing the session toast.
- **How to Use:** Enter delay (e.g., "1" for 1 minute).

- **Effect:** Toast shows after this time if no agent connects.
- **Limitations:** No effect when prior toggle is OFF.

Toast Text to Be Shown

- **Path:** Settings → Options → General → Admin Settings → Inbound → Toast text to be shown
- **What It Does:** Customizable toast message for session connection delays.
- **How to Use:** Enter notification text.
- **Effect:** Shown to customers as toast.
- **Limitations:** Length and formatting limits.

No. of Times "No Agent Connect Timer" Resets

- **Path:** Settings → Options → General → Admin Settings → Inbound → Number of times "No agent connect timer" resets
- **What It Does:** Controls how many times the connection timer resets at the customer end if not attended by an agent.
- **How to Use:** Enter the count.
- **Effect:** Timer will reset as many times as set.
- **Limitations:** Once resets are exhausted, session is archived or different message is shown.

Timer Reset Toast

- **Path:** Settings → Options → General → Admin Settings → Inbound → Timer reset toast
- **What It Does:** Message displayed after the timer has reset for the specified number of times.
- **How to Use:** Enter text.
- **Effect:** Customer sees this after last reset.
- **Limitations:** Applies only after all timer resets are consumed.

Auto Archive Lead If Agents Are Offline (in mins)

- **Path:** Settings → Options → General → Admin Settings → Inbound → Auto archive lead if agents are offline (in mins)
- **What It Does:** Automatically archives leads if no agents are available after the set timer.
- **How to Use:** Enter duration in minutes (range: 1–120).
- **Effect:** Leads are auto-archived into follow-up.
- **Limitations:** Strict timer, must be at least 1 minute.

Auto Archive Popup

- **Path:** Settings → Options → General → Admin Settings → Inbound → Auto archive pop up
- **What It Does:** Customizes message for leads that have been auto-archived.
- **How to Use:** Enter message (max 160 characters).
- **Effect:** Popup appears to customer indicating status.
- **Limitations:** Length limit 160 characters, including spaces and special signs.

Outbound

Enable Outbound Co-browsing

- **Path:** Settings → Options → General → Admin Settings → Outbound → Enable Outbound Co-browsing
- **What It Does:** Allows agents to initiate co-browsing sessions with customers by generating and sharing a special session link, even for external pages that do not have Cobrowsing JS embedded.
- **How to Use:**
    - Toggle this option ON.
    - Agents access a “Start a session” button on their dashboard.

    - Agent generates a co-browsing session link, enters the webpage, customer name, and contact info, and then shares the link with the customer.
    - The customer can join the session by clicking the shared link.

- **Limitations:**
    - Outbound (proxy) sessions may have a slight action lag due to server sync.
    - Cookies will not persist in proxy sessions.
    - Chrome extension cannot be used for proxy outbound.
    - Co-browsing does not carry across new browser tabs or domains (no cross-domain).
    - Some secure/payment gateway sites may block co-browsing due to SSL or clickjacking constraints.
    - Session links expire after a configurable duration (default: 60 minutes).

Enable Tag Based Assignment for Outbound

- **Path:** Settings → Options → General → Admin Settings → Outbound → Enable tag based assignment for outbound
- **What It Does:** Allows outbound leads to be distributed to agents based on assigned product categories or tags.
- **How to Use:**
    - Toggle this setting ON.
    - Add/manage category tags for agents in the system.
- **Limitations:** Categories/tags must be actively managed, system will only route by the configured tags.

Show Floating Button Even After the Lead is Generated

- **Path:** Settings → Options → General → Admin Settings → Outbound → Show floating button even after the lead is generated
- **What It Does:** Keeps the floating "Connect" button visible to customers even after an outbound lead has already been generated.

- **How to Use:** Toggle ON to keep the support engagement button present on the user interface after lead submission.
- **Limitations:** Persistent presence of floating UI elements may affect site layout or user experience, especially on mobile views.

Reverse

Enable Reverse Co-browsing

- **Path:** Settings → Options → General → Admin Settings → Reverse → Enable Reverse Co-browsing
- **What It Does:** Allows agents to share their own browser view with the customer, enabling agents to demonstrate or walk through complex workflows/file:1].
- **How to Use:**
  - Toggle ON to activate in the system.
  - Agents initiate screen sharing directly from their browser to the customer during a session.
- **Limitations:** Privacy/screen security should be evaluated; not all environments or browsers support all screen sharing features. Only enabled if organization requires interactive agent-to-customer view.

Customer Side Settings

Font Settings

- **Path:** Settings → Options → General → Customer Side Settings → Font Settings
- **What It Does:** Allows admins to configure the font used in client-facing modals, toasts, tooltips, and other UI on the customer's website.
- **How to Use:** Select or upload a desired font within the Font Settings.
- **Effect:** All visible elements seen by end customers reflect the chosen font style, enhancing brand consistency.
- **Limitations:** Only applies to customer-side views, does not impact agent/admin console, may be limited to supported font file types or families.

Console Settings

Change Console Color

- **Path:** Settings → Options → General → Console Settings → Change Console Color
- **What It Does:** Lets the admin set or update the color theme of the internal Cobrowsing console, affecting the background and major UI highlights for all users.
- **How to Use:** Input a hex color code or use the color picker.
- **Limitations:** Affects only the admin/agent interface, not the customer UI.

Change Logo

- **Path:** Settings → Options → General → Console Settings → Change Logo
- **What It Does:** Enables uploading a custom company logo for the Cobrowsing platform console.
- **How to Use:** Click “Upload Logo”, select an image file, and confirm.
- **Effect:** Logo displays on the console for all organization users.
- **Limitations:** Accepted image formats (e.g., .png, .jpeg) and size restrictions apply.

Go-Live Date

- **Path:** Settings → Options → General → Console Settings → Go-Live Date
- **What It Does:** Records and displays the go-live date for the service/project inside the console for project management and audit purposes.
- **How to Use:** Enter or select a date as needed.
- **Limitations:** Informational; does not affect functionality.

Whitelisted Domains

- **Path:** Settings → Options → General → Console Settings → Whitelisted Domains

- **What It Does:** Restricts Cobrowsing support features (e.g. support request widgets) to only listed domains.
- **How to Use:** Add fully qualified domains to the list (e.g., www.example.com).
- **Effect:** Only users on these approved domains can launch Cobrowsing sessions.
- **Limitations:** Essential for security; support features will not render on non-listed domains.

Password Prefix

- **Path:** Settings → Options → General → Console Settings → Password Prefix
- **What It Does:** Adds a prefix to auto-generated agent passwords to simplify onboarding and reduce login issues.
- **How to Use:** Enter the preferred text prefix, which is prepended to all new agent passwords when generated.
- **Effect:** Reduces confusion and errors with new user logins, improves password management consistency.
- **Limitations:** Only applies to passwords generated after setting the prefix; prefix cannot be modified for existing accounts.

Deploy Chatbot

- **Path:** Settings → Options → General → Console Settings → Deploy Chatbot
- **What It Does:** Integrates a customer support chatbot within the Cobrowsing Console using an externally provided script (CJS Script).
- **How to Use:** Toggle ON and paste the chatbot script into the provided field; save to activate.
- **Effect:** Chatbot becomes available within the console, supporting agents and users with scripted responses and automation.
- **Limitations:** Script compatibility and configuration depend on the chatbot solution; may require technical support for setup.

12.2.4.6.5.2. Cobrowse Options

Agent Settings

Enable Screen Capture

- **Path:** Settings → Options → Cobrowse Settings → Agent Settings → Enable Screen Capture
- **What It Does:** Allows agents to capture screenshots during a cobrowsing session.
- **How to Use:** Toggle ON to enable screen capturing capability.
- **Effect:** Agents can take snapshots of the customer's screen to document or assist in troubleshooting.
- **Limitations:** Privacy compliance must be maintained; use screen captures responsibly.

Enable Invite Agent

- **Path:** Settings → Options → Cobrowse Settings → Agent Settings → Enable Invite Agent
- **What It Does:** Allows agents to invite other agents to join an ongoing cobrowsing session.
- **How to Use:** Toggle ON. Agents will see an option to invite available agents via the session navbar.
- **Effect:** Enhances collaborative support by enabling multiple agents to assist a customer.
- **Limitations:** Invite functionality is required for session transfer to work.

Enable Session Transfer

- **Path:** Settings → Options → Cobrowse Settings → Agent Settings → Enable Session Transfer
- **What It Does:**
  This feature allows the primary agent currently handling an ongoing cobrowsing session

to transfer the entire session to another agent. It facilitates smoother handoffs and workload sharing among support agents.

- **Transfer Request Expiry:**
  The transfer request sent to the target agent will expire after a duration defined in the **Transfer request expiry time (In secs)** setting. If the secondary agent does not respond in this timeframe, the transfer request becomes invalid.
- **Important Note:**
  If **only** "Invite Agent" is enabled but "Enable Session Transfer" is disabled, agents will be able to invite others to join the session but will **not** be able to transfer session ownership. The invitation behavior remains as before, i.e., addition without transfer.
- **Primary Agent's Options:**
  After the secondary agent accepts the transfer request, the primary agent gains the option to either:
  - Stay in the session with all existing functionalities, or
  - Leave the session, transferring full control to the secondary agent.
- **Secondary Agent's View:**
  The transferred agent will see the lead marked as "Transferred" in the **Lead Status** column. Hovering or clicking this status shows details about which agent transferred the lead to them.

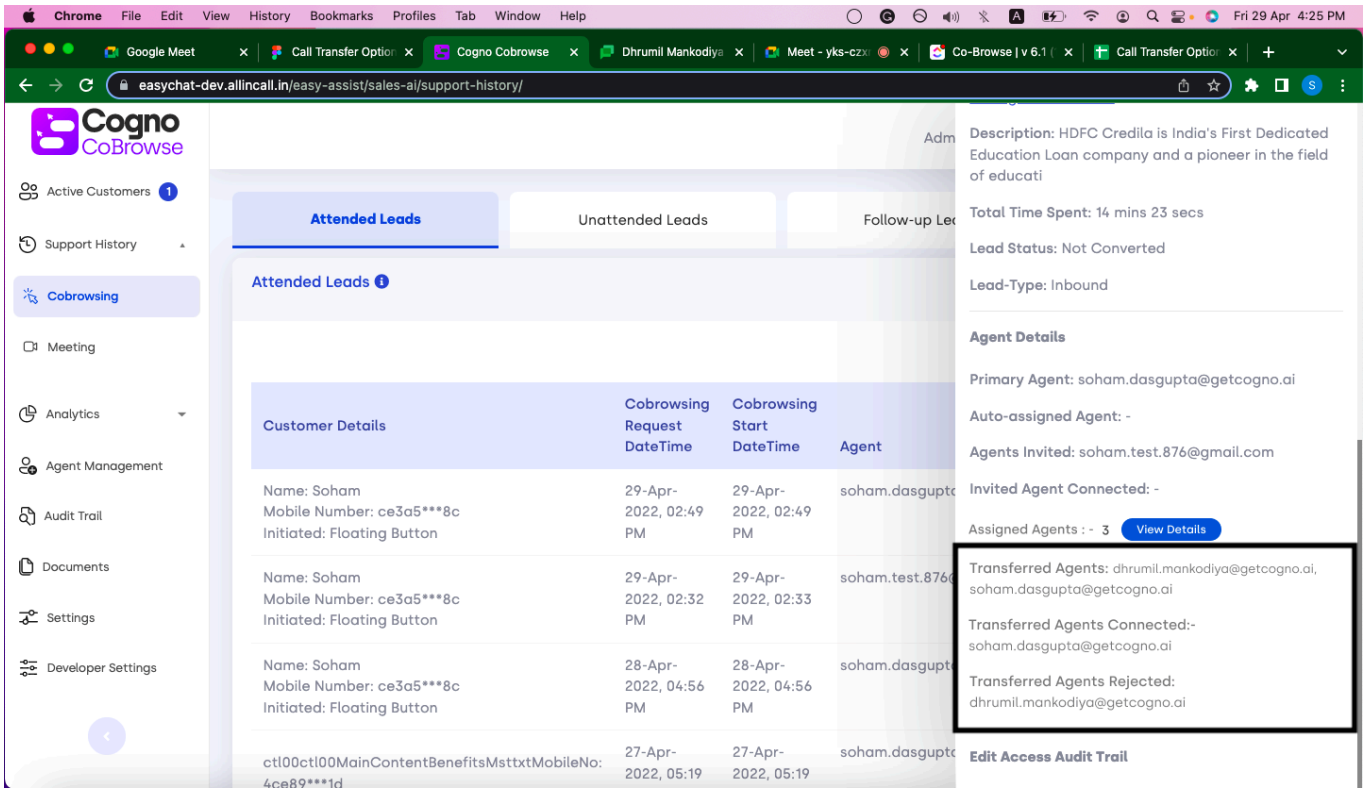
Admin, Admin Ally, Supervisor, Agent: Session Transfer Tracking

This feature provides enhanced logging and tracking of session transfers for analytics and accountability:

- **Transferred Agents:** Contains the email IDs of agents to whom the session/lead was transferred. If multiple transfers occurred, all email IDs are recorded in chronological order, separated by commas.
- **Transferred Agents Rejected:** Lists of email IDs of agents who rejected transfer requests, recorded similarly in chronological order by transfer attempts.
- **Transferred Agents Connected:** Logs email IDs of agents who accepted transfer requests and joined the session. Multiple agents who joined are listed sequentially, with the first connected agent appearing first.

This detailed tracking is visible inside the Cobrowsing console under:

Support History > Cobrowsing > Attended Leads > Session Details > Agent Details



Enable Edit Access

- **Path:** Settings → Options → Cobrowse Settings → Agent Settings → Enable Edit Access
- **What It Does:** Allows agents to edit or interact with customers' form fields during cobrowsing.
- **How to Use:** Toggle ON to allow edit permissions.
- **Effect:** Agents can assist by directly filling or modifying customer input fields.
- **Limitations:** Agents must have proper consent; auditing may be needed for compliance.

Enable Screen Recording

- **Path:** Settings → Options → Cobrowse Settings → Agent Settings → Enable Screen Recording
- **What It Does:** Allows recording of the cobrowsing session screen for later review.
- **How to Use:** Toggle ON to enable recording.
- **Effect:** Sessions can be recorded for quality assurance or training.
- **Limitations:** Privacy laws may require permission; manage storage and access carefully.

Admin Settings

Select Masking Type for Sensitive Data Fields

- **Path:** Settings → Options → Cobrowse → Admin Settings → Select masking type for sensitive data fields
- **What It Does:**
  Allows the admin to set a default masking type (e.g., partial, full) for fields considered sensitive (such as passwords, personal info) during cobrowsing.
- **How to Use:**
  Choose the masking type from the dropdown. This will apply to all fields marked for masking in customer sessions.
- **Effect:**
  Improves privacy and compliance by hiding sensitive data from agents.
- **Limitations:**
  Takes effect only on fields coded/configured for masking; not applicable to screen sharing or non-form elements.

Enable Cross Domain Co-browsing

- **Path:** Settings → Options → Cobrowse → Admin Settings → Enable cross domain co-browsing
- **What It Does:**
  Enables a special screen sharing solution for situations where customers navigate across multiple domains during the session.
- **How to Use:**
  Toggle ON to activate; use when customer support involves websites that redirect/change domains frequently.
- **Effect:**
  The agent can view and help across domains, not just within one site.
- **Limitations:**
  Some domains (especially payment gateways) may block cross-domain screen sharing

due to security constraints.

Enable Reverse Co-browsing

- **Path:** Settings → Options → Cobrowse → Admin Settings → Enable reverse co-browsing
- **What It Does:**
  Empowers agents to demonstrate workflows or complete forms by sharing their own screen and interacting with forms while the customer observes.
- **How to Use:**
  Toggle ON; agents initiate reverse cobrowsing directly from their console.
- **Effect:**
  Useful for guided demos, walkthroughs, or assisted onboarding.
- **Limitations:**
  Not suitable for sensitive information transfer from agent to customer.

Enable Low Bandwidth Co-browsing

- **Path:** Settings → Options → Cobrowse → Admin Settings → Enable low bandwidth co-browsing
- **What It Does:**
  Optimizes cobrowsing for customers on slower connections by reducing resource usage and network consumption.
- **How to Use:**
  Toggle ON, adjust “Low bandwidth network limit in kbps”, and “Session Inactivity (in min.)”.
- **Effect:**
  Ensures sessions remain responsive even on a limited internet.
- **Limitations:**
  May reduce UI/media fidelity for end-users compared to standard mode.

Enable Manual Switching (for Low Bandwidth)

- **Path:** Settings → Options → Cobrowse → Admin Settings → Enable manual switching

- **What It Does:**
  Allows manual switching between standard and low bandwidth modes for agents and customers.
- **How to Use:**
  Toggle ON/OFF in the session settings.
- **Effect:**
  More flexible session management in varying network conditions.
- **Limitations:**
  User-initiated switch, not automatic.

Session Inactivity (In mins)

- **Path:** Settings → Options → Cobrowse → Admin Settings → Session Inactivity
- **What It Does:**
  Ends a cobrowsing session if either the agent or customer closes their tab and does not return after a defined period.
- **How to Use:**
  Toggle ON, set “Session Inactivity (in min.)” to determine the timeout.
- **Effect:**
  Prevents abandoned sessions from lingering indefinitely.
- **Limitations:**
  A timeout must be specified; the session ends irreversibly once triggered.

Generate Drop Link Expiry Time (In mins)

- **Path:** Settings → Options → Cobrowse → Admin Settings → Generate Drop Link Expiry Time (In mins)
- **What It Does:**
  Sets how long a meeting/join link is valid (“drop link”) before it expires.
- **How to Use:**
  Enter the desired expiry time in minutes.
- **Effect:**
  If the user tries to join after expiry, they see “Meeting link expired.”

- **Limitations:**
  Only valid within the specified window. Must re-generate if expired.

URLs Where Lead Is Considered Converted

- **Path:** Settings → Options → Cobrowse → Admin Settings → URLs where lead is considered as converted
- **What It Does:**
  Marks a lead as “converted” automatically when the customer reaches a specified URL/page on the client site during cobrowsing.
- **How to Use:**
  Add all desired URLs; match must be exact from the beginning of the URL.
- **Limitations:**
  Exact matching required; only URLs accessed during cobrowse are eligible.

Block Certain URLs While Doing Cobrowsing

- **Path:** Settings → Options → Cobrowse → Admin Settings → URLs which will be blocked
- **What It Does:**
  Restricts cobrowsing sessions from accessing specified URLs, preventing agents or customers from browsing to blocked destinations.
- **How to Use:**
  Enter URLs to block, then save.
- **Effect:**
  Session navigation will be stopped/redirected if those URLs are attempted.
- **Limitations:**
  Blocked URLs are denied only within cobrowse sessions; you must maintain an up-to-date list.

Customer Settings

Enable Masked Field Warning

- **Path:** Settings → Options → General → Customer Side Settings → Enable Masked Field Warning
- **What It Does:**
  Shows a tooltip to the customer whenever they attempt to enter data into a sensitive field that is masked for the agent during cobrowsing.
- **How to Use:**
  Toggle ON to activate the warning tooltip.
- **Effect:**
  Enhances customer awareness about data privacy by informing them that the field is masked and their input is protected from agent view.
- **Limitations:**
  Tooltip text can be customized, but the warning will appear only for fields explicitly masked by admin configuration.

Masking Text Shown to Customer

- **Path:** Settings → Options → General → Customer Side Settings → Masking Text Shown to Customer
- **What It Does:**
  Customizable text displayed inside the tooltip when the masked field warning is triggered.
- **How to Use:**
  Enter the desired message text in the provided field.
- **Effect:**
  Allows tailored messaging to customers about data privacy assurance.
- **Limitations:**
  Text length and format should be concise to avoid UI disruption.

Show Verification Code Popup

- **Path:** Settings → Options → General → Customer Side Settings → Show Verification Code Popup

- **What It Does:**
  Prompts customers with a pop-up asking them to either Allow or Decline the cobrowsing request sent by an agent.
- **How to Use:**
  Toggle ON to activate the consent modal for customers before cobrowsing begins.
- **Effect:**
  Reinforces customer consent and transparency for cobrowsing sessions.
- **Limitations:**
  Popup must be accepted to start the session; if declined, the session is not established.

Ask Support Code to the Customer

- **Path:** Settings → Options → General → Customer Side Settings → Ask Support Code to the Customer
- **What It Does:**
  Requires customers to enter a support code provided by the agent to join a cobrowsing session.
- **How to Use:**
  Toggle ON to enable this requirement.
- **Effect:**
  Adds an extra layer of security, ensuring only authorized customers join sessions.
- **Limitations:**
  May add friction; requires agents to generate and communicate current support codes.

Message to be Shown on Customer Consent Modal

- **Path:** Settings → Options → General → Customer Side Settings → Message to be Shown on Customer Consent Modal
- **What It Does:**
  Customizes the textual message displayed to customers on the consent popup/modal before granting cobrowsing permissions.
- **How to Use:**
  Enter the desired message to clearly explain the consent request.

- **Effect:**
  Improves customer understanding and trust in the cobrowsing process.
- **Limitations:**
  Message length should be concise and customer friendly.

General Settings

Text to Be Shown on Agent Feedback Modal

- **Path:** Settings → Options → Cobrowse → General → Agent Settings → Text to Be Shown on Agent Feedback Modal
- **What It Does:**
  Defines the message or instructions displayed to the agent when they end a cobrowse session and see the feedback modal.
- **How to Use:**
  Enter the desired text content.
- **Effect:**
  Helps standardize agent responses and captures structured feedback at session end.
- **Limitations:**
  Text should be concise and clear.

Enable Predefined Remarks with Dropdown

- **Path:** Settings → Options → Cobrowse → General → Agent Settings → Enable Predefined Remarks with Dropdown
- **What It Does:**
  Enables agents to select predefined remarks from a dropdown menu for session feedback or notes.
- **How to Use:**
  Toggle ON to activate; a dropdown will appear allowing predefined remark selection.
- **Effect:**
  Speeds up agent input and ensures standardized remark usage.
- **Limitations:**
  The dropdown or buttons for remarks are mutually exclusive settings.

Enable Predefined Remarks with Buttons

- **Path:** Settings → Options → Cobrowse → General → Agent Settings → Enable Predefined Remarks with Buttons
- **What It Does:**
  Allows agents to select predefined remarks through on-screen buttons instead of dropdowns.
- **How to Use:**
  Toggle ON to use button-based remark selection.
- **Effect:**
  Provides quick remark entry for frequently used notes.
- **Limitations:**
  It can't be enabled simultaneously with the dropdown option; only one remark input style is active.

Enable Predefined Sub-Remarks with Dropdown

- **Path:** Settings → Options → Cobrowse → General → Agent Settings → Enable Predefined Sub-Remarks with Dropdown
- **What It Does:**
  Adds a secondary dropdown for sub-categorizing predefined remarks.
- **How to Use:**
  Toggle ON to enable sub-remark functionality.
- **Effect:**
  Allows finer categorization of feedback or issue types.
- **Limitations:**
  Like other predefined remark toggles, only one can be active at a time; if all toggles are OFF, only free-text input is shown.

Enable Agent Connect Message

- **Path:** Settings → Options → Cobrowse → General → Agent Settings → Enable Agent Connect Message
- **What It Does:**
  Displays a welcome popup message on the customer side (in the chat box) whenever an agent joins the cobrowse session for the first time.
- **How to Use:**
  Toggle ON to enable; message content may be customizable elsewhere.
- **Effect:**
  Enhances customer experience by greeting them when support starts.
- **Limitations:**
  Only appears once per session when the agent first connects.

Enable Smart Agent Assignment

- **Path:** Settings → Options → Cobrowse → General → Agent Settings → Enable Smart Agent Assignment
- **What It Does:**
  If a customer's session gets dropped and they re-initiate support within a default timeframe (usually 10 minutes), the system tries to assign the lead back to the same agent.
- **How to Use:**
  Toggle ON to activate; default reassign time may be configurable.
- **Effect:**
  Improves continuity of support and customer satisfaction by reconnecting customers to familiar agents.
- **Limitations:**
  If the original agent is busy or unavailable, the lead gets assigned to another suitable agent automatically.

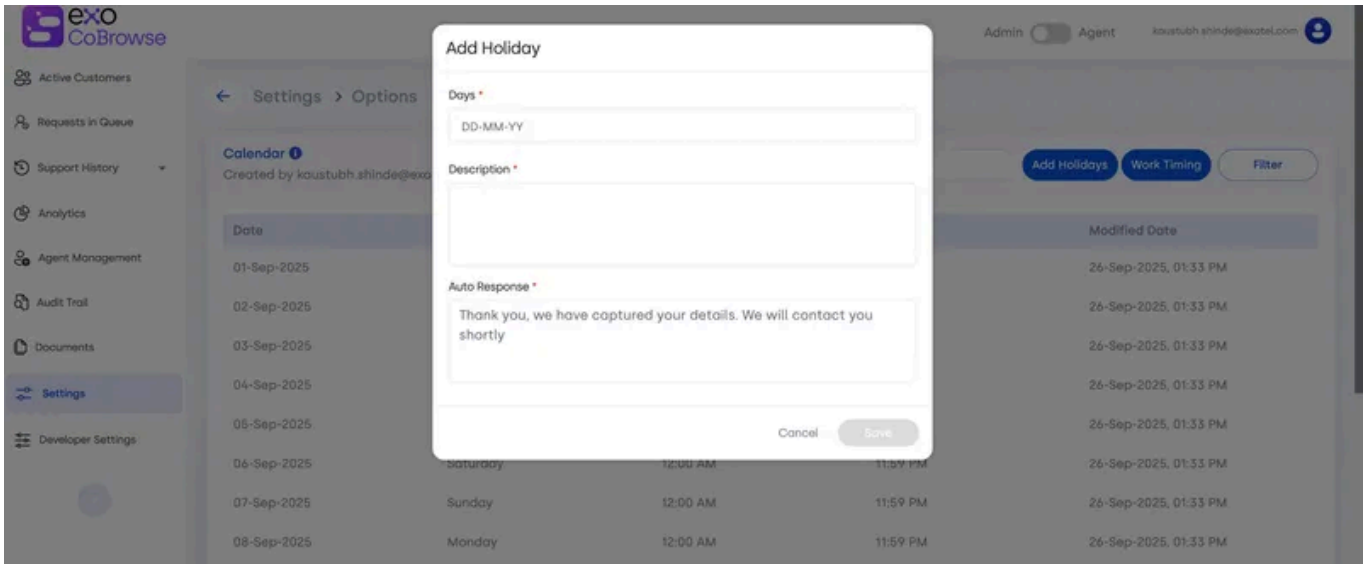
12.2.4.6.5.3. Calendar Options

Overview

The Calendar feature allows admins to manage and configure work timings and holidays for all users under the admin, including admin allies, supervisors, and agents. This helps schedule availability and manage non-working days effectively.

Access Path

Settings → Options → Calendar

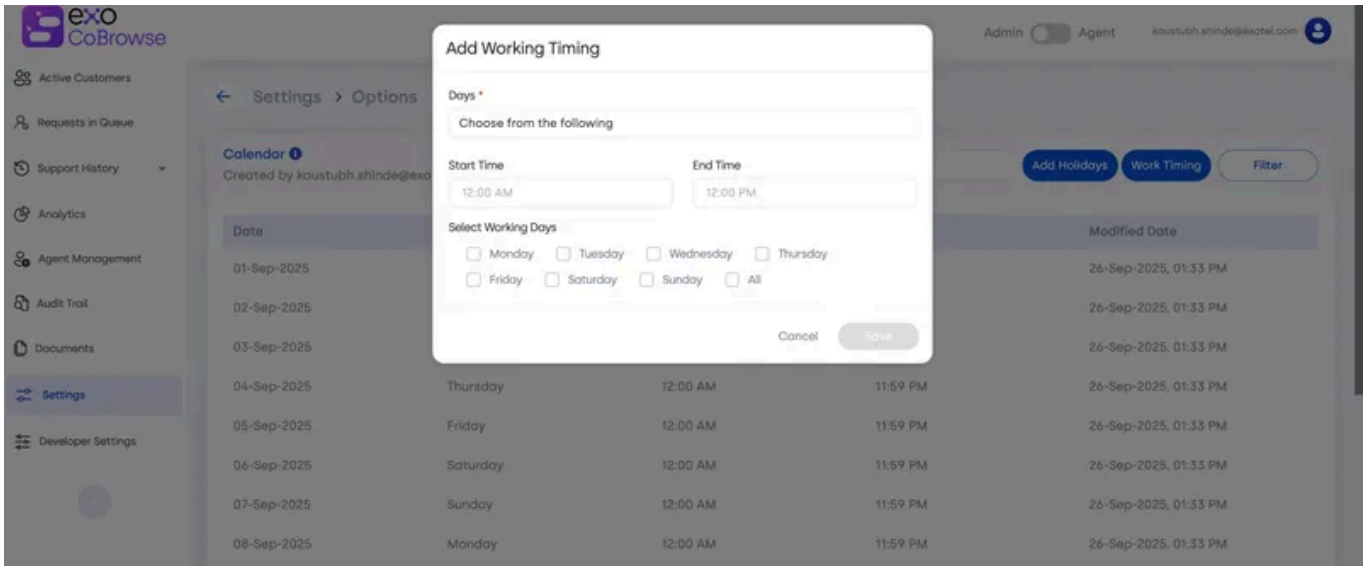


Features & Usage

Add/Edit Work Timings

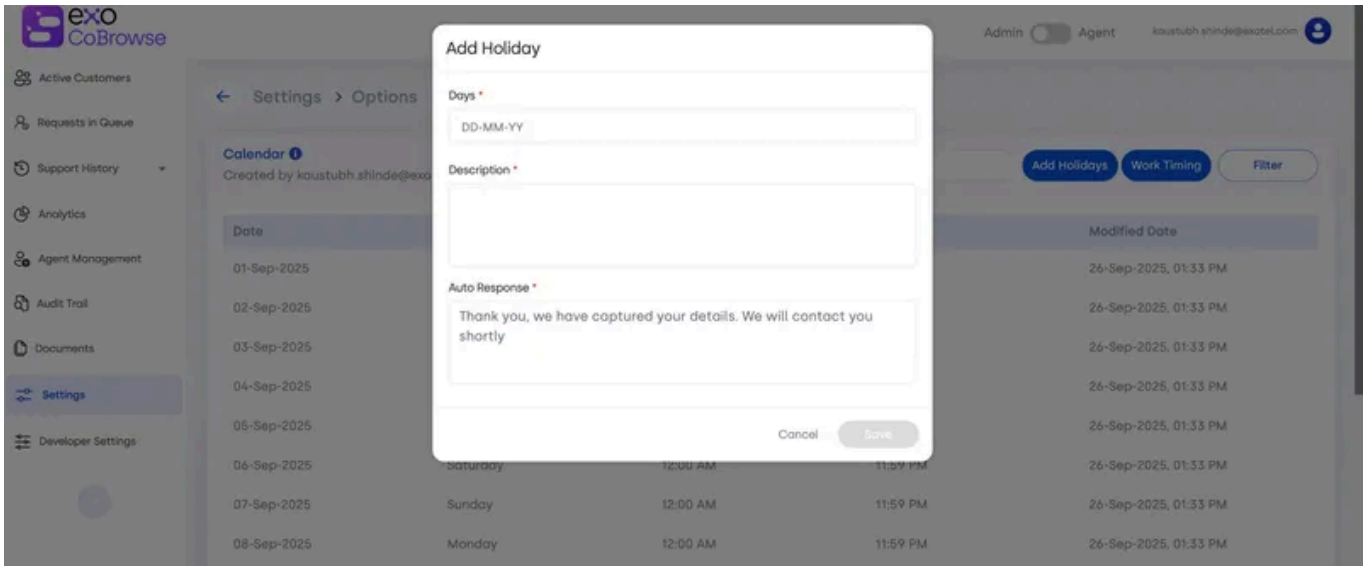
- Admins can add or edit default work timings for users on the calendar.
- Default working hours are set for each day as 12:00 AM to 11:59 PM for the current month.
- Admins can set work timings months or even a year in advance by using the **Work Timing** button.
- Work timings can be configured individually by specifying:
    - Start Time

    - End Time
    - Select Applicable Working Days
- Work timings set here reflect on the availability of admin allies, supervisors, and agents.
- The modified time and date of any changes are tracked and visible to supervisors and admin allies.



Add Holidays

- Admins can mark certain days as holidays using the **Add Holidays** button.
- Adding a holiday opens a pop-up/modal where the admin can:
    - Select the holiday date.
    - Provide a descriptive name or details for the holiday.
    - Set an auto-response message that will be shown to customers on that holiday.
- Holidays are visually distinct on the calendar and override default work timings for those days.
- The auto-response appears as a toast notification to customers submitting requests on holidays, informing them of unavailability.



Editing and Managing Days

- Both work timings and holidays can be edited by clicking the edit icon beside the respective day.
- Admins can switch a working day to a holiday or vice versa from the edit modal.
- Filters available let admins view calendar data by day, month, or year for easier management and search.
- Selecting the "All" checkbox selects all days, useful for bulk updates; unselecting any day will deselect the "All" checkbox automatically.

Important Notes and Limitations

- The **Save** button in Work Timings and Add Holidays modals remains disabled unless all required fields are properly filled.
- The calendar system automatically generates monthly calendars when users log in without overwriting existing holiday settings.
- If a day is set as a holiday, bulk updates to convert entire months to working days will not overwrite that holiday.
- The interface hides start/end times and the working days selector in Settings if disabled under inbound options.

- Modified dates of changes are logged and visible to supervisors and agents for audit purposes.

Customer Side Impact

- Customers receive the auto-response set for holidays as toast notifications after submitting any requests on those days.
- This helps manage customer expectations regarding support availability during holidays.

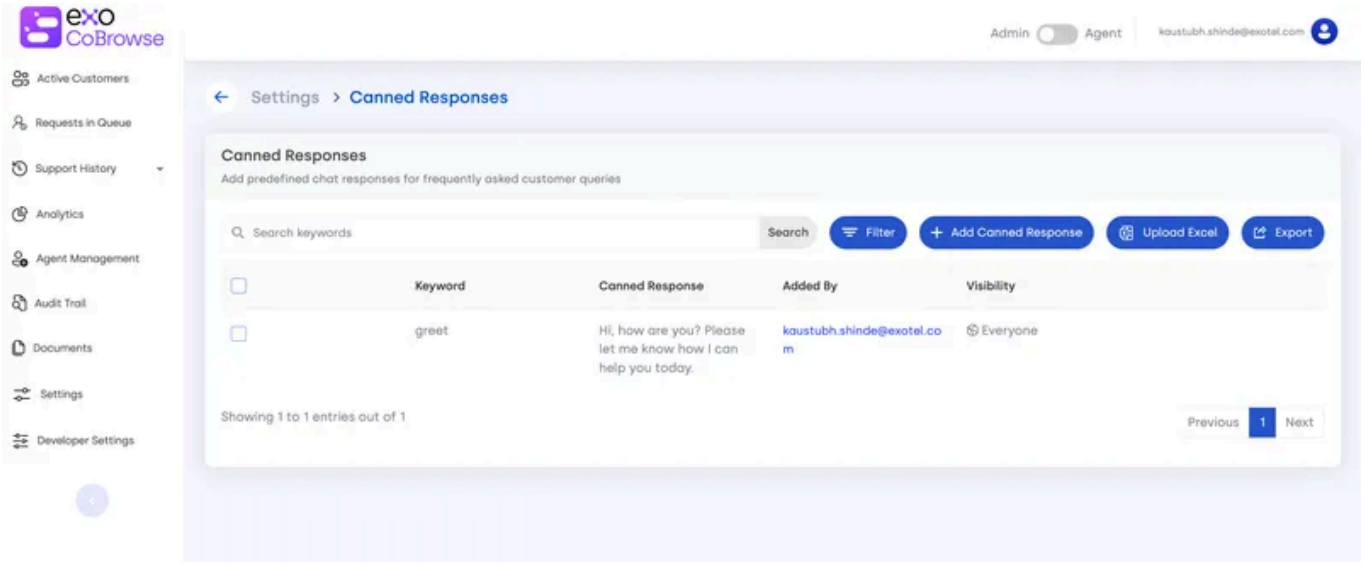
12.2.4.6.6. Canned Response

Overview

The Canned Response feature in CoBrowsing LiveChat allows agents to reuse frequently used chat responses quickly without typing entire messages. This improves response time, consistency, and efficiency during live customer interactions.

Access Path

Settings → Options → Canned Response



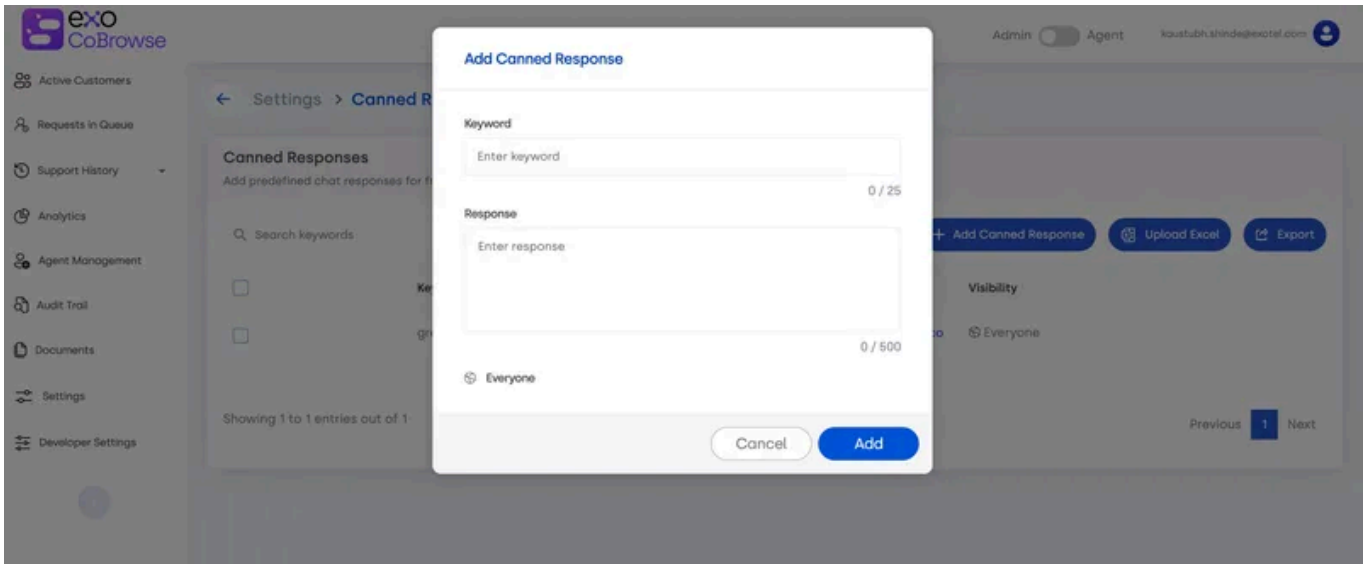
Roles and Permissions

- **Admin:**
  Can create, view, edit, and delete canned responses that are accessible across the entire organization. Admin-created responses are available to all agents.
- **Supervisor:**
  Can create, view, edit, and delete canned responses that they specifically add. These responses are available to agents reporting to that supervisor. Admins can also view and modify supervisor responses.
- **Agent:**
  Can view canned responses created by admins and their supervisors. Agents use these canned responses during live chat simply by typing a shortcut (keyword).

Features

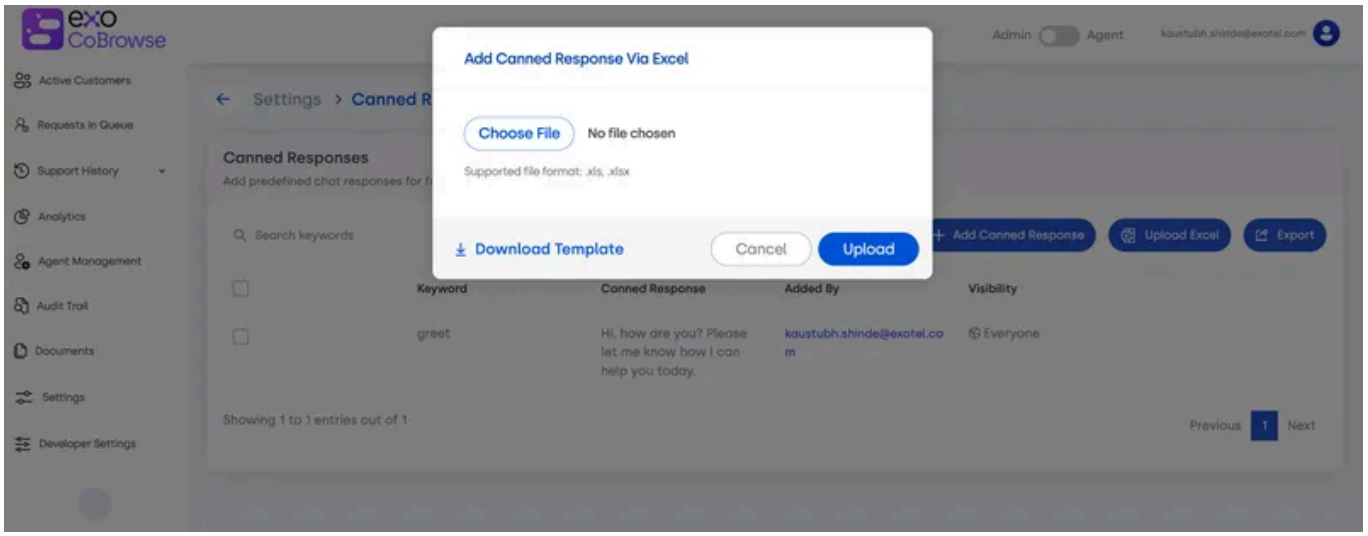
Add Canned Response

- Click on **Add Canned Response** to create a new canned response.
- Provide:
  - **Keyword:** The shortcut text agents will type to trigger the response (no spaces allowed in keywords).
  - **Response Text:** The full message that appears when the keyword is used (max 500 characters).
- The newly added response becomes immediately available to all users applicable under the role permissions.



Upload Excel

- Bulk upload canned responses using Excel files in .xlsx or .xls formats.
- A sample Excel template is available to guide formatting.
- Upon uploading, the system validates data and notifies about errors.
- If validation errors occur, an error sheet is downloaded for correction.



Export

- Export all existing canned responses into an Excel sheet for backup or offline editing.

Search and Filter

- Quickly search canned responses by keyword.
- Filter responses by creator (Admin or Supervisor) and by email address of the creator.

Edit and Delete

- Hover over any canned response to see edit and delete icons.
- Quickly modify or remove canned responses as needed.

Usage in Live Chat

- Agents type the keyword prefixed by a special character (e.g., "." or "/") to auto-insert the corresponding canned response into the chat.
- This method speeds up interaction and ensures communication quality.

Limitations

- Keywords should not contain spaces.
- Response text has a maximum character limit of 500.
- Only roles with permission can add or modify canned responses, while agents have read and usage rights only.

Example

- Keyword: greet
- Response: "Hi, How are you? Please let me know how I can help you today?"

12.2.4.6.7. Advanced Settings

Overview

Admins have access to three advanced settings that enhance security, searchability, and automation for cobrowsing sessions.

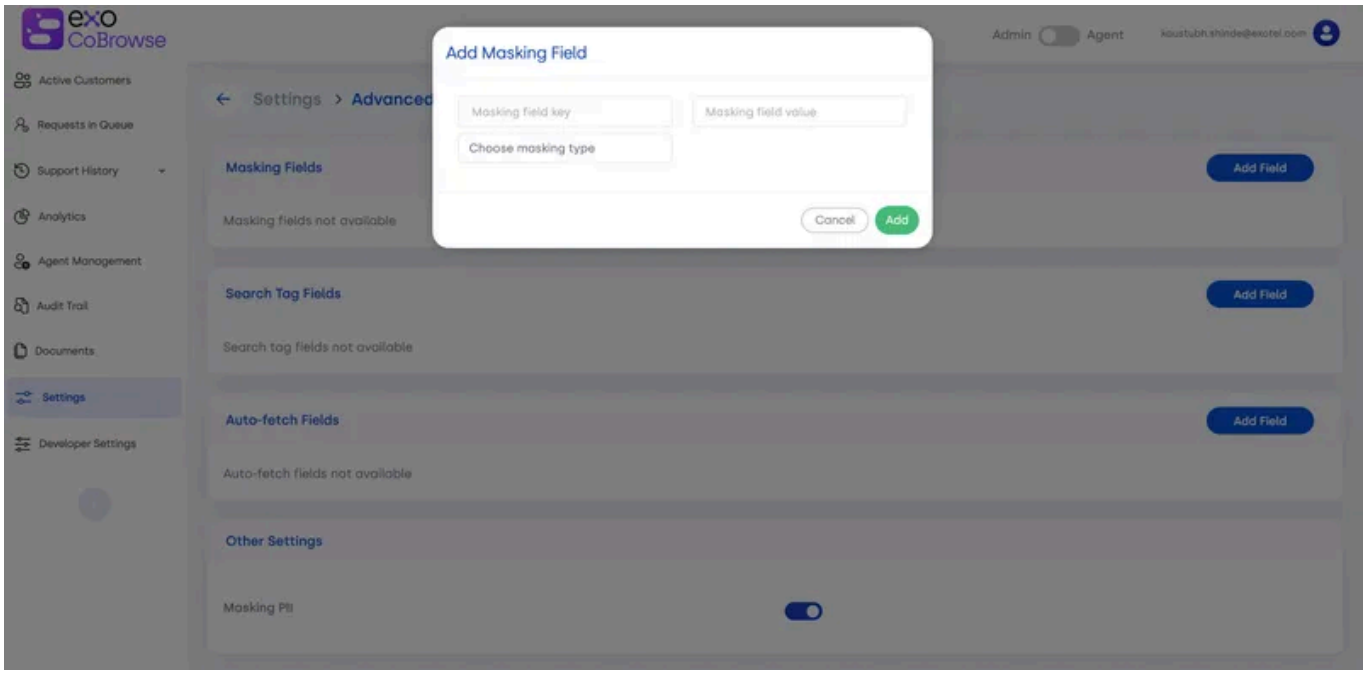
Access Path

Settings → Advanced Settings

Features

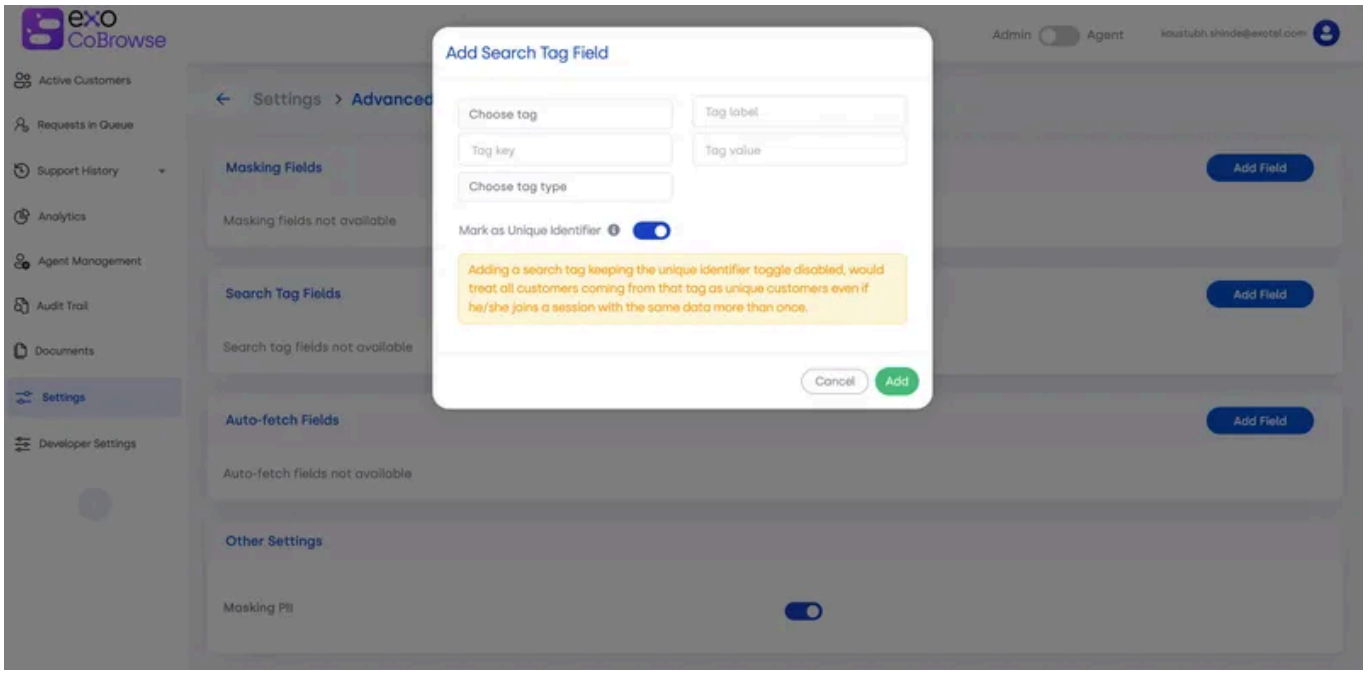
Masking Fields

- Let's admins specify which fields should be masked for the agent during cobrowsing sessions.
- **How to Use:**
  - Click "Add Field" to enter the identifier (e.g., field ID) of any sensitive field (such as one containing PII data).
  - In **Reverse CoBrowsing** mode, this allows the admin to blur those sensitive fields, ensuring customer data is protected even if the agent can edit or view other fields.
- **Effect:**
  - Fields listed here appear blurred/masked to agents, even if they have edit access or the field is being filled by the customer.
- **Limitations:**
  - Only fields added by the admin will be masked; all other fields are visible as normal.



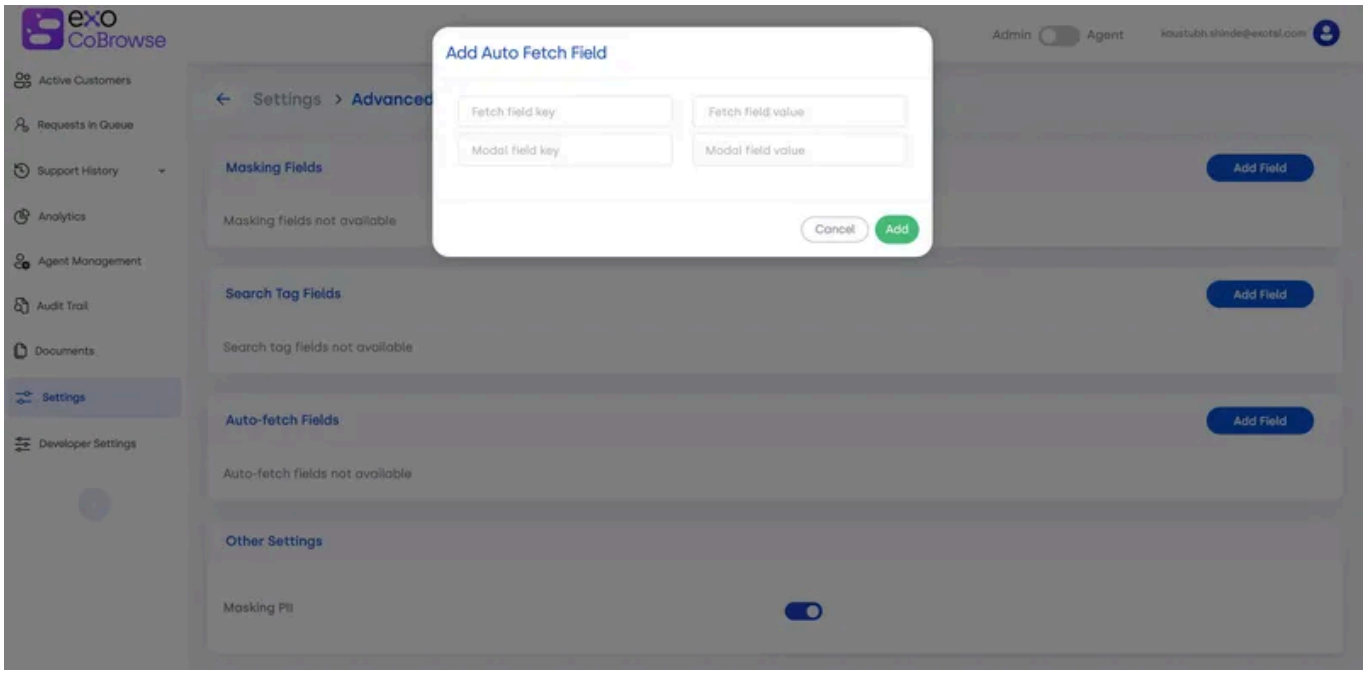
Search Tag Fields

- Allows admins to define which form fields or data points can be used for searching leads in the system.
- **How to Use:**
  - Click "Add Field" to include new fields for searchability.
- **Effect:**
  - These fields can later be used as filters or queries when searching for specific leads or session histories.
- **Limitations:**
  - If no fields are added, lead search remains limited to the default identifiers.



Auto-Fetch Fields

- Enables the system to automatically fetch and display values from these fields during a cobrowsing session.
- **How to Use:**
  - Click "Add Field" to specify field names or keys desired for auto-fetching.
- **Effect:**
  - When a session is in progress, the system will retrieve and display the latest value/value changes for these fields without manual intervention.
- **Limitations:**
  - Only selected and configured fields will be auto-fetched.


exo CoBrowse
Admin
Agent
Active Customers
Requests in Queue
Support History
Analytics
Agent Management
Audit Trail
Documents
Settings
Developer Settings
Settings > Advanced
Masking Fields
Add Field
Masking fields not available
Search Tag Fields
Add Field
Search tag fields not available
Auto-fetch Fields
Add Field
Auto-fetch fields not available
Other Settings
Masking PII
Add Auto Fetch Field
Fetch field key
Fetch field value
Modal field key
Modal field value
Cancel
Add

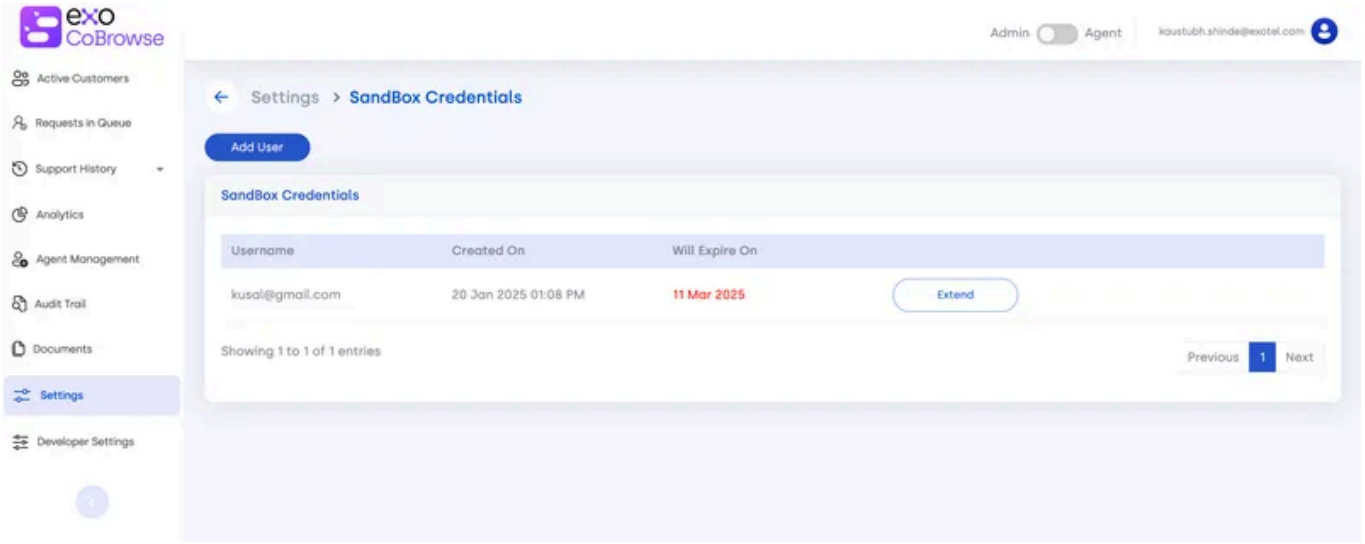
12.2.4.6.8. Sandbox Credentials

Overview

This section enables the creation and management of sandbox credentials. These credentials provide limited access to specific parts of the CoBrowsing platform for sandbox or test users, typically for development, testing, or restricted administrative access.

Access Path

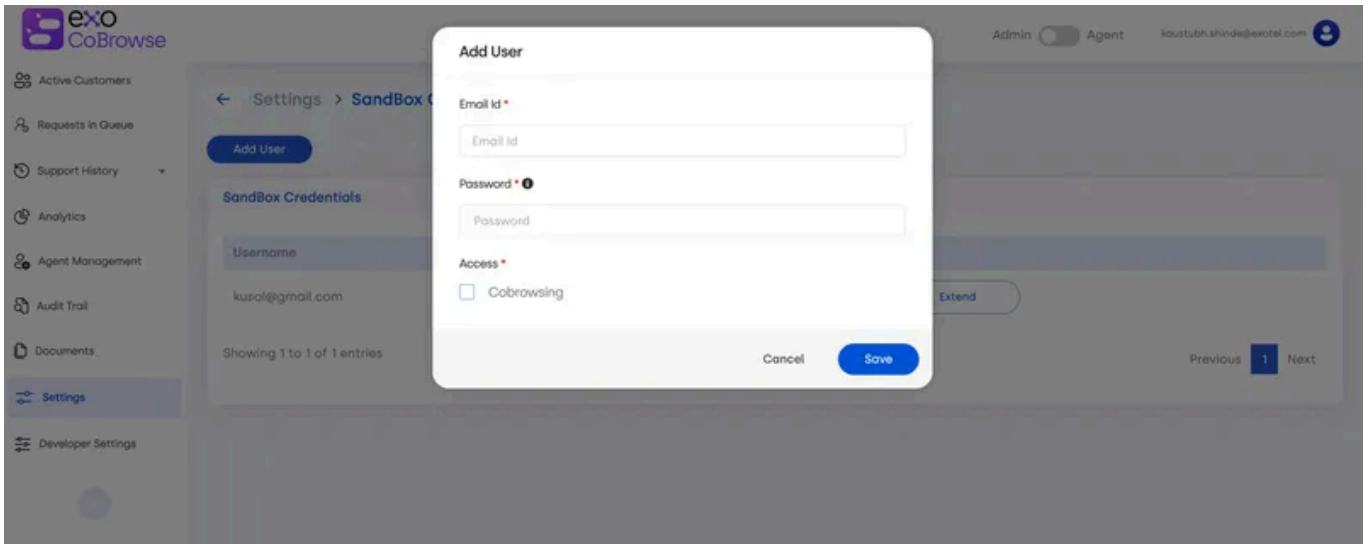
CoBrowsing Console → Settings → Sandbox Credentials



Features & Usage

Add User

- Admins can add sandbox users by clicking **Add User**.
- During creation, the admin selects the access type:
  - **CoBrowsing only (Inbound option selectable)**
  - **Video Call only**
- Depending on the choice, relevant toggles for inbound or video call access are enabled.

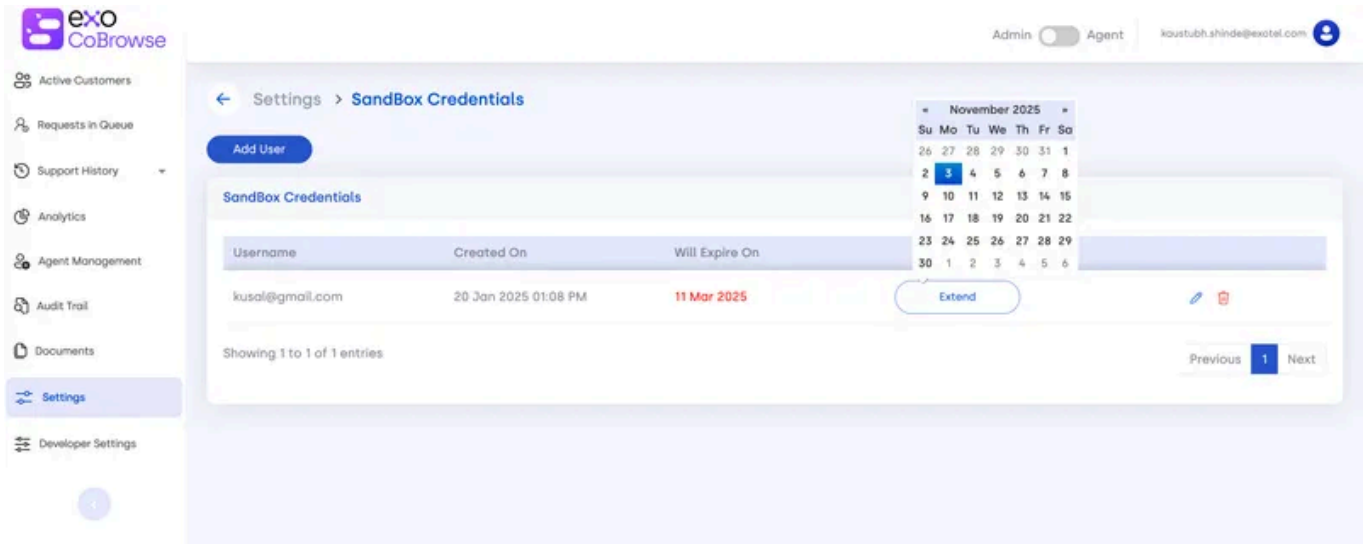


Login and Access Restrictions

- The created sandbox admin user, upon login, sees only the settings pages relevant to their access:
    - If **CoBrowsing only** is selected with inbound enabled, the user sees only the **General** and **CoBrowse** pages (Video Call page hidden).

Extend and Edit Credentials

- The **Extend** button opens a calendar to select the expiry date of the sandbox user's access.
- The **Edit** button brings up a modal with all user details pre-filled for modification.



Important Notes and Limitations

- Sandbox credential creation is restricted to users with an email domain of @exotel.com and who have staff-level access.
- Newly created sandbox users are valid by default for 15 days.
- Sandbox users themselves do not have access to modify or create additional sandbox credentials.
- If a sandbox user's access expires, supervisors or agents mapped to that admin will also see error messages restricting access.

12.2.5. Admin Ally Persona

Role Overview

The Admin Ally acts as an intermediary management role positioned between Admin and Supervisor in the CoBrowsing platform hierarchy. This role allows for comprehensive team management capabilities while lacking some full administrative privileges.

Admin Allies are responsible for managing agents and supervisors under their domain, overseeing the assignment and performance of customer leads, and assisting in administrative processes via the CoBrowsing console.

Console Access

Admin Allies have access to the following major console sections:

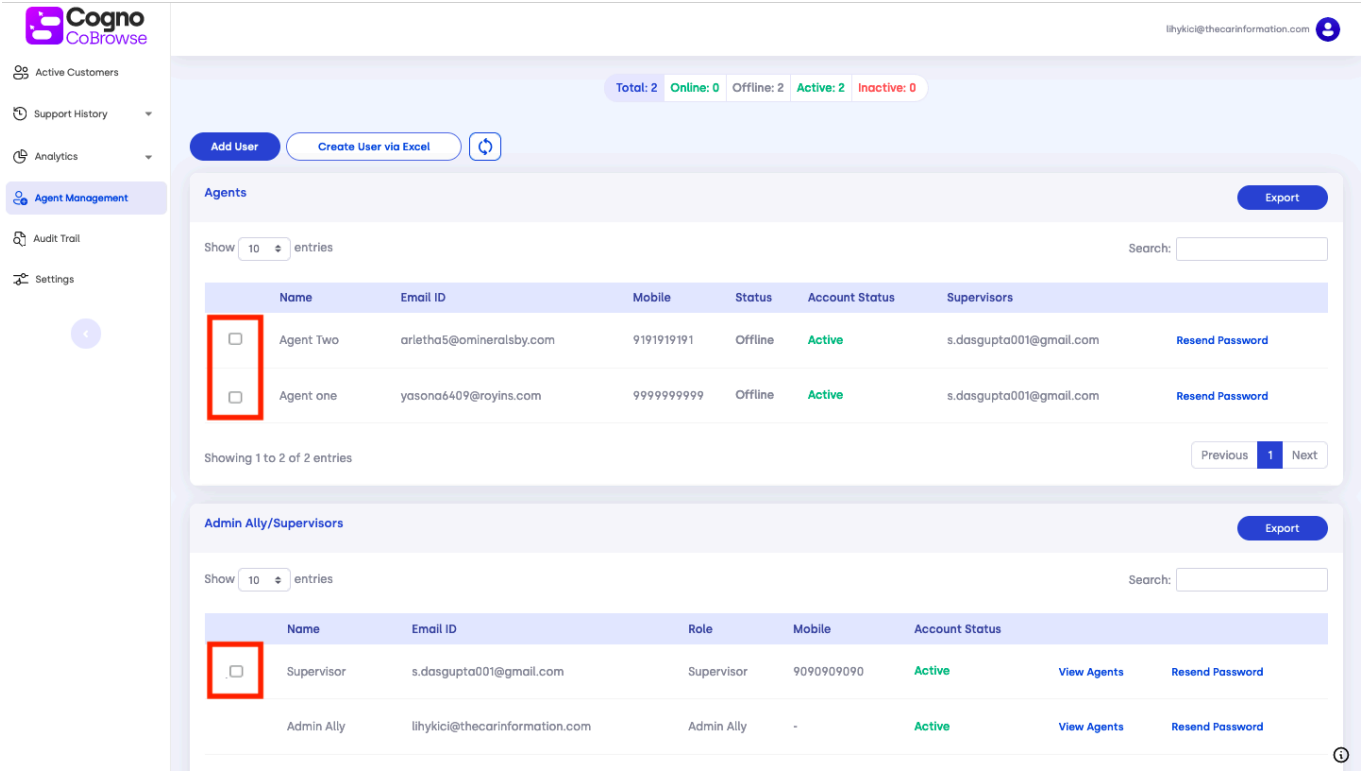
- Agent Management (including Add User and Deactivation)
- Support History (view detailed lead and session records)
- Analytics (view inbound performance and agent-level metrics)
- Audit Trail (review recorded session audit logs)
- Documents (manage shared documents)
- Settings (general platform settings relevant to their scope)
- Active Customers (monitor assigned active leads and sessions)

Key Features and Functionalities

Agent and Supervisor Management

- **Add New Users:**
  Admin Allies can add new agents or supervisors individually via the **Add User** button or through bulk import with Excel.
- **Deactivate/Activate Users:**
  Admin Allies have the authority to deactivate or reactivate agents and supervisors

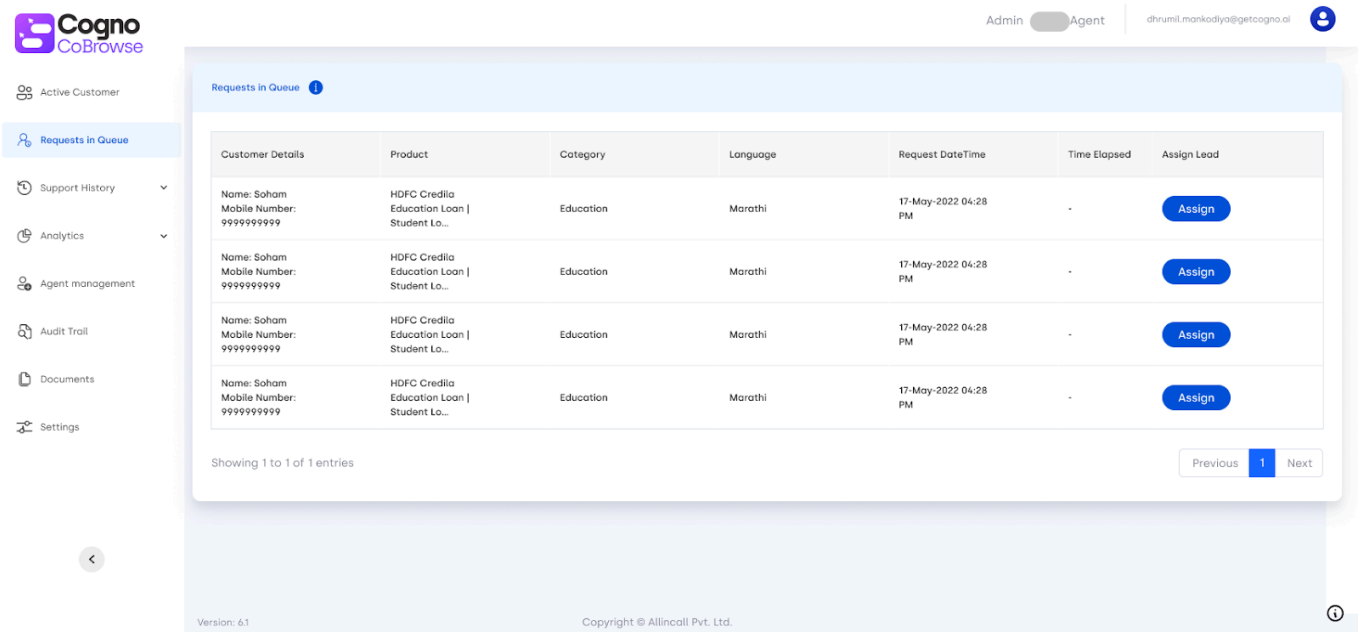
under their management. Only users with active status can be deactivated, and the process is reversible.



- **Search and Export:**
  Provides searching capabilities by username, email, or status. Can export lists for reporting or audits.
- **View User Status:**
  Admin Allies can view detailed statuses including online/offline, active/inactive, and account status for agents and supervisors in their purview.

Lead Assignment and Transfer

- Similar to Supervisors, Admin Allies can assign unassigned leads to available agents under their jurisdiction based on lead category and language tags.
- Leads assigned successfully appear in the respective agent's Active Customers dashboard.
- Admin Allies can transfer leads between agents and supervisors within their assigned groups.



Analytics and Reporting

- Admin Allies have access to inbound analytics cards detailing:
  - Self Assigned Sessions
  - Average Self Assign Time
- These analytics are visible aggregated by agents within their teams, helping Admin Allies monitor workload distribution and efficiency.

Differences between Admin and Supervisor

- Unlike full Admins, Admin Allies have more restricted access to system-wide configurations and cannot manage sandbox credentials or video call settings.
- Compared to Supervisors, Admin Allies have broader user management control, including managing supervisors themselves.
- Admin Allies act as escalation points for Supervisors and agents, serving as a managerial bridge.

12.2.6. Supervisor Persona

Role Overview

The Supervisor is a critical managerial role within the CoBrowsing platform, positioned as the next level under Admin. Supervisors possess significant console access to oversee and support their team of agents effectively.

Console Access

Supervisors have access to the following key sections within the CoBrowsing Console:

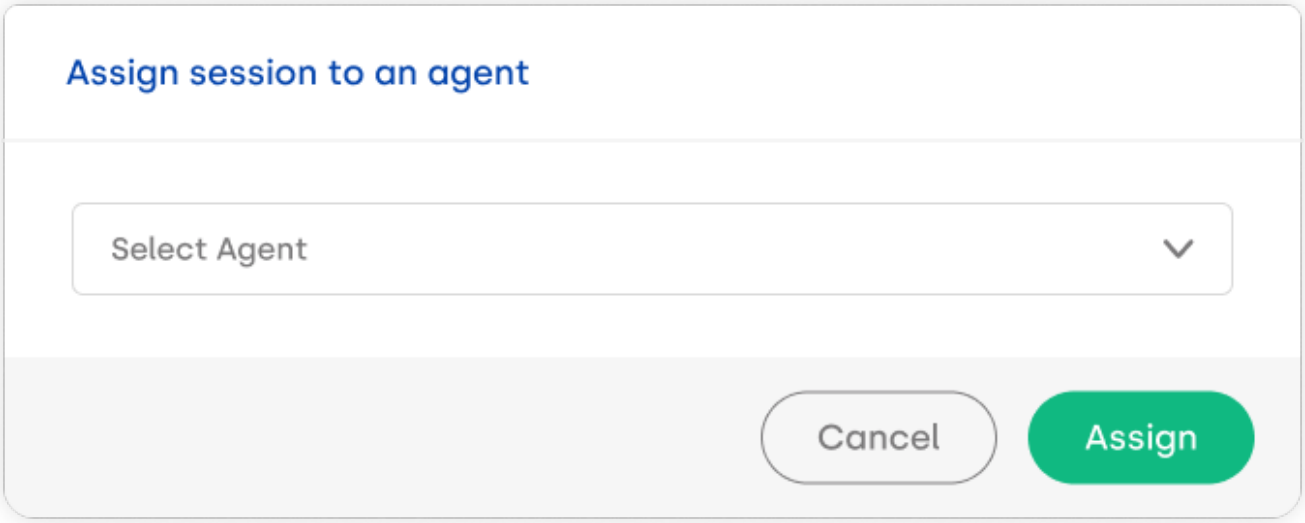
- Support History
- Agent Management
- Analytics
- Audit Trail
- Documents
- Profile settings

These access levels allow supervisors to monitor, manage, and analyze team and customer support activities efficiently.

Lead and Agent Management

Lead Transfer

- Supervisors have the authority to transfer leads between agents.
- From the **Active Customers** dashboard, supervisors can click on an agent's ID to change the agent assigned to a lead.
- They can search through available agents matching the lead's product category and language requirements.
- Supervisors and Admin Allies can assign unassigned leads to any online agent under their domain who matches the lead category and language tag.
- Assignment occurs via clicking the **Assign** button on leads, followed by selecting the agent from a dropdown.



Self-Assigned Leads & Analytics

- Supervisors can view details of agents' self-assigned leads, including:
  - Number of **Self Assigned Sessions**
  - Average time taken for self-assignment (**Average Self Assign Time**)
- These metrics are available via two new cards on the Inbound Analytics page, visible to supervisors and admin allies.
- Supervisors also see agent-wise counts and average times to assess workload and efficiency.

Active Customer Lead Transfer

- Supervisors can transfer leads directly from the active customer's dashboard, especially before an agent has joined the session.

Unassigned Lead Queue

- Supervisors can manage unassigned leads, assigning them to agents efficiently based on availability, category, and language.

Benefits for Supervisors

- Enhanced team oversight with real-time lead and session status monitoring.
- Capability to dynamically reassign work to balance agent load and improve customer response times.

- Access to detailed analytics for performance review and process optimization.

12.2.7. Agent Persona

Active Customers

Support History

Analytics

Settings

12.2.7.1. Active Customers

This section lists all leads assigned to the agent. As soon as a customer clicks the "Connect" button in the ‘Request for Support’ or ‘Contact Us’ modal, a lead is created and assigned to an available agent. The agent must connect with the assigned lead to provide assistance using the available cobrowsing features.

Agent Actions and Features

- **Connect with Assigned Lead:** Agents can initiate a cobrowse session with assigned customers.
- **Assist Customers:** Help customers choose the right options according to their needs.
- **Send Files:** Agents can share images and PDF documents during sessions.
- **Invite Agents:** If an agent is unable to resolve the issue, they can invite other available agents to join the session for collaboration.
- **Session End:** Both agent and customer can end the session by providing remarks.
- **CoBrowsing Features Available to Agents:**
  - **Screen Capture & View Screenshot:** Capture and view snapshots during sessions.
  - **Invite Agent:** Invite other agents to join an ongoing session.
  - **Chat:** Real-time chat with customers.
  - **Share Predefined Documents:** Easy sharing of pre-approved documents.
  - **Screen Recording:** Record the session for quality or training.
  - **Markers:** Interactive drawing/highlighting on the webpage; marker color matches theme and disappears after 2 seconds.
  - **Browser Tabs Monitoring:** Agents see customer tab changes visually:
    - Dot (.) indicates the tab the customer is currently viewing.
    - Line indicates the agent’s current tab.
    - Cross (X) indicates customer closed the tab.
    - Toast notifications indicate when customer is on a different tab than the session.

- **Session Transfer & Status:**
  - Agents can view transferred calls and the lead status of sessions.
- **Support Code Feature (Modified Inbound Approach):**
  - When enabled, agents see a generated code in Active Customers dashboard.
  - Customers are required to enter this code when requesting support, which assigns the lead directly to that agent.
  - If "Keep support code mandatory" is enabled, the code must be entered by customers; otherwise, lead assignment is round-robin.
- **Lead Request Date and Time:**
  - The "Request DateTime" field shows the exact date and time when the customer initiated the lead request.

12.2.7.2. Support History

The Support History section provides agents with a comprehensive view of all cobrowsing sessions and leads assigned to them. This enables agents to track, manage, and review past support interactions efficiently.

Path: CoBrowsing Console → Support History

Features

Tabs Available to Agents in Support History

- **Modified Leads:**
  View sessions where changes or updates were made.
- **Follow-Up Leads:**
  Contains leads not currently assigned due to agent capacity limits or offline status, which get auto-assigned later or require follow-up actions.
- **Attended Leads:**
  Lists all leads where the agent actively handled the session.

Lead Management

- Agents can view detailed lead information, such as:
  - Customer details (Name, Mobile Number)
  - Product category and language
  - Request date and time
  - Meeting details and status
  - Lead status (e.g., converted, unattended)
  - Agent remarks and customer remarks
- Agents can filter and search leads by various criteria including Title, Start Date, End Date, Product Category, Language, and Lead Status.

Lead Transfer

- Agents can transfer leads to other agents if required (depending on permissions).
- The **Transfer Lead** button activates a modal with a dropdown of agents matching lead categories and languages.
- Supervisors and admins can also view and modify these transfers.

Additional Agent-Specific Features

- **Self-Assigned Leads:**
  Agents can see leads that they self-assigned, with time tracked via the "Self Assign Time" parameter.
- **Lead Status Management:**
  Agents can track lead statuses, including active, unattended, declined, and completed.
- **Session Details Access:**
  View session audit trails, chat history, screenshots, and recordings linked to each lead.

Requests in Queue

- If enabled by the admin, agents get access to a **Requests in Queue** tab under Active Customers.
- Agents can self-assign leads from this queue.
- Leads not picked within a configured auto-archive timeout move to the follow-up leads section.

Reporting and Analytics

- Agents have view access to analytics related to:
  - Average session duration
  - Waiting time metrics
  - Customer conversion rates
  - Repeat customer data

Limitations and Notes

- Lead transfer requires selecting one or more leads before activation.

- Auto-assign and follow-up features depend on admin toggles.
- Filtering by multiple product categories might restrict the agent dropdown if no eligible agents exist.
- Support history data visibility is scoped per agent's assigned leads and role permissions.

12.2.7.3. Analytics

The Analytics section provides agents with a comprehensive view of their inbound and outbound cobrowsing activities, helping them track performance, lead outcomes, and customer engagement.

Key Analytics Cards for Agents

Inbound Analytics

Displays statistics related to inbound leads assigned to the agent, including:

- **Captured Leads:** Total leads captured.
- **Searched Leads:** Number of leads searched.
- **CoBrowsing Requests Attended:** Count of cobrowse sessions attended.
- **Customers Converted:** Number of leads successfully converted.
- **CoBrowsing Requests Denied by Customers:** Leads where customers denied the cobrowse request.
- **Average Session Time:** Average duration per session.
- **Conversion Rate:** Percentage of leads converted.
- **Average Waiting Time for Attended Leads:** Average wait before session start.
- **Average Waiting Time for Unattended Leads:** Average wait in unattended scenarios.
- **Service Request Analytics:** Overview of service requests received.

Outbound Analytics

Tracks outbound lead metrics including:

- **Leads Searched**
- **CoBrowsing Requests Attended**
- **Customers Converted**
- **CoBrowsing Requests Denied by Customers**
- **Net Promoter Score (NPS)**

- **Average Session Time**
- **Conversion Rate**

Features and Insights

- The analytics dashboard displays data relevant only to the agent viewing it, scoped by their assigned leads.
- Adding data from the four primary tiles (Captured Leads, Attended Requests, Customers Converted, Request Denials) yields the total inbound cobrowsing requests initiated to the agent.
- Helps agents monitor their efficiency and effectiveness in customer support through measurable KPIs.
- Provides insights into customer behavior, like denial rates and conversion trends.
- Enables performance tracking over specific date ranges using filters.

Meeting Analytics (Related Section)

- Meeting requests are categorized by initiation type:
    - Contact Us button
    - Greeting Bubble
    - Inactivity Popup
    - Exit Intent Popup
- Displays metrics like number of meetings scheduled, completed, ongoing, and average call duration per meeting.

12.2.7.4. Settings

Profile

- **Path:** CoBrowsing Console → Settings → Profile
- **What It Does:**
  Agents can view all personal information provided during account creation.
- **Features:**
  - View profile details such as name, email, and assigned roles.
  - Change their account password securely.
- **Limitations:**
  Agents cannot modify other profile attributes except for their password.

Advanced Settings

- **What It Does:**
  Agents have the capability to customize their work preferences related to product categories and languages.
- **Features:**
  - Select preferred product categories relevant to their expertise.
  - Choose supported languages they are comfortable assisting customers in.
- **Limitations:**
  Changes apply only to their profile and influence only assignment logic; broader access or admin-level setting modifications are not permitted.

Path

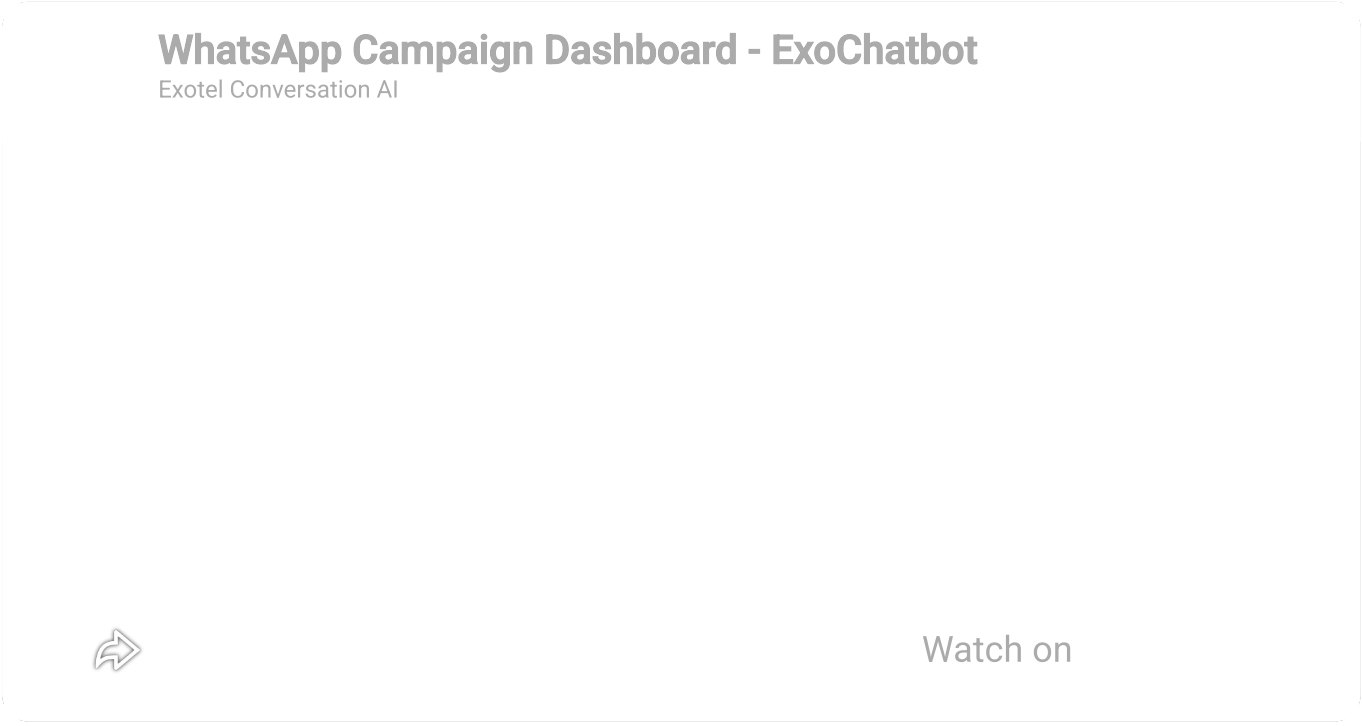
CoBrowsing Console → Settings → Advanced Settings

12.3. Campaigns

12.3.1. WhatsApp Campaign

Introduction

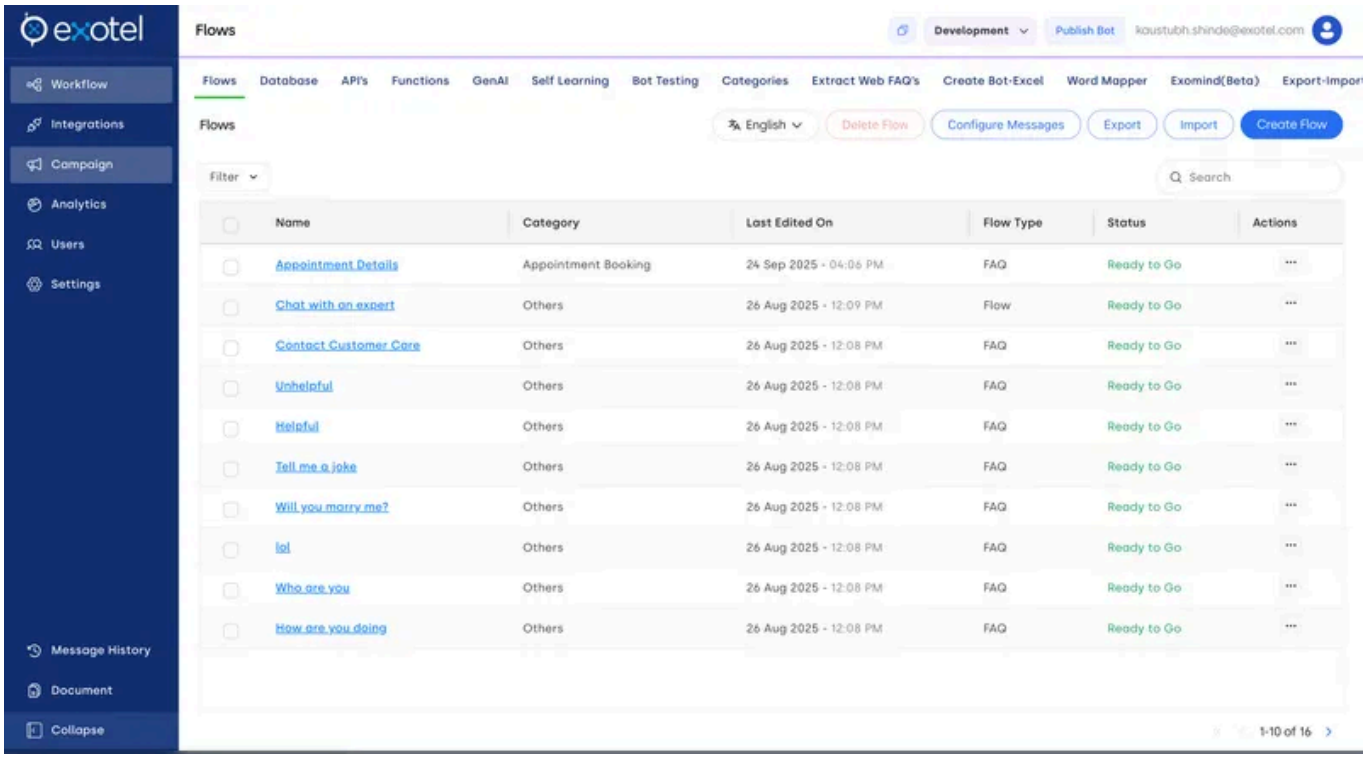
WhatsApp Campaigns is a scalable platform for launching, managing, and analyzing WhatsApp communication campaigns. The product is designed to streamline all facets of campaign setup, execution, reporting, analytics, and integration, enabling teams to automate outreach with precision, compliance, and ease.



Access and Set up

How to Access the Campaigns Console

- **Log in** to the Chatbot console with your credentials.
- Navigate to the **Chatbot section** in the main menu.
- Ensure that a chatbot instance is configured. Request creation from the delivery team if needed.
- To access the Campaign Console:
    - For v8 & v7: Click on the "Campaign" icon or arrow as shown in the console's UI from LHS navigation bar.
    - For v6 and below: Click on the the “Additional Tools” and then "Campaign" from LHS navigation bar.

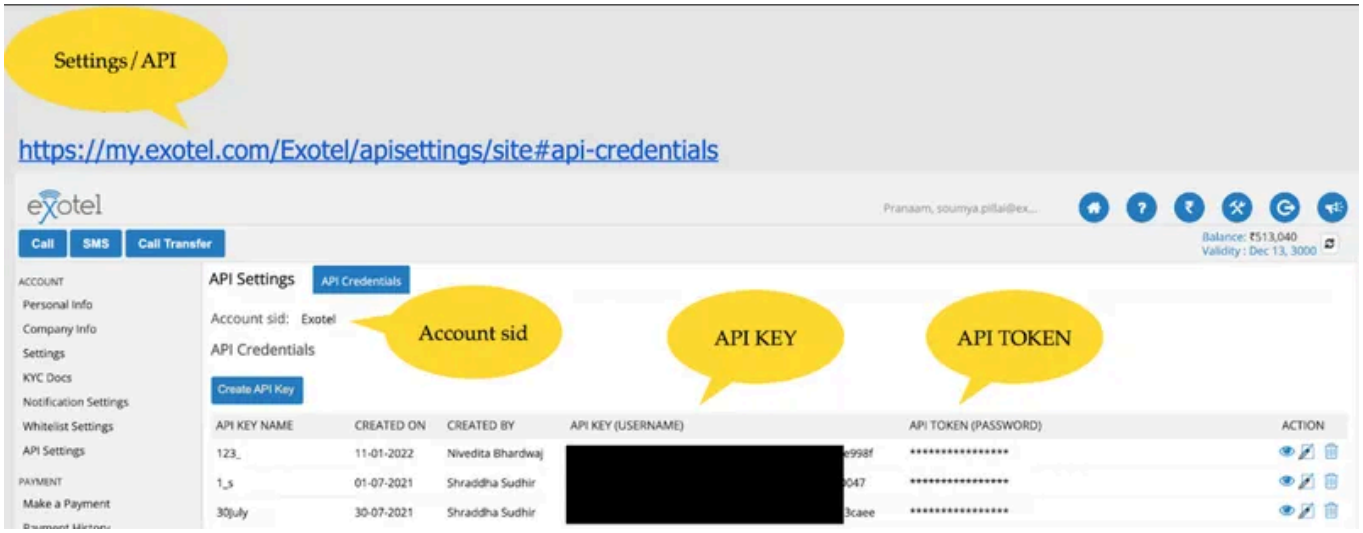


- Select **Campaigns** from the dropdown menu.
- The Campaigns interface opens, dedicated to the current chatbot context.

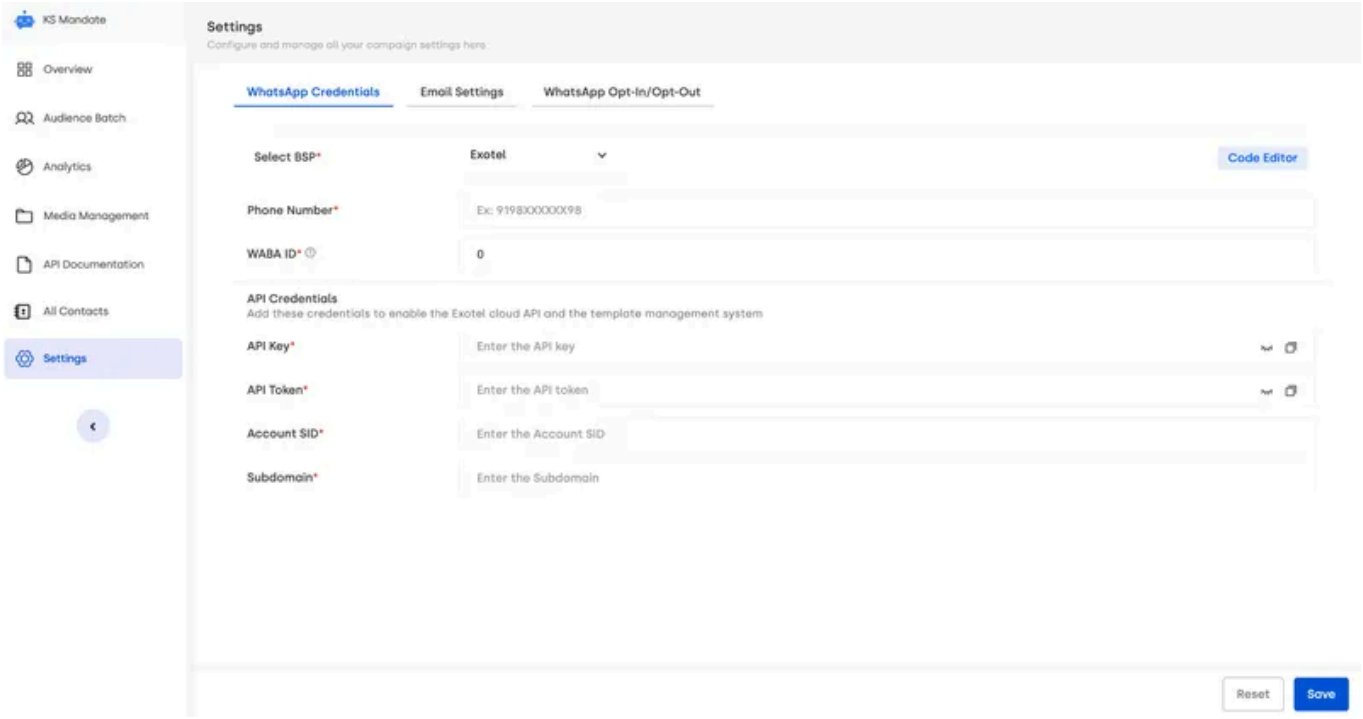
Connecting a WhatsApp Number

- Click **Configure WhatsApp Credentials** either from the Overview page prompt or in the Settings section (see UI image for cues).

- Choose BSP:
  - *Exotel Cloud API* as per platform instructions.
  - To integrate your own BSP, please reach out to your respective Account Manager.
- Required details for onboarding:
  - Account SID: Login/Signup with your Exotel account (https://my.exotel.com)
  - Phone number
  - API Key, API Token



- Fill in all fields for WhatsApp number onboarding on the Campaign's Settings page.



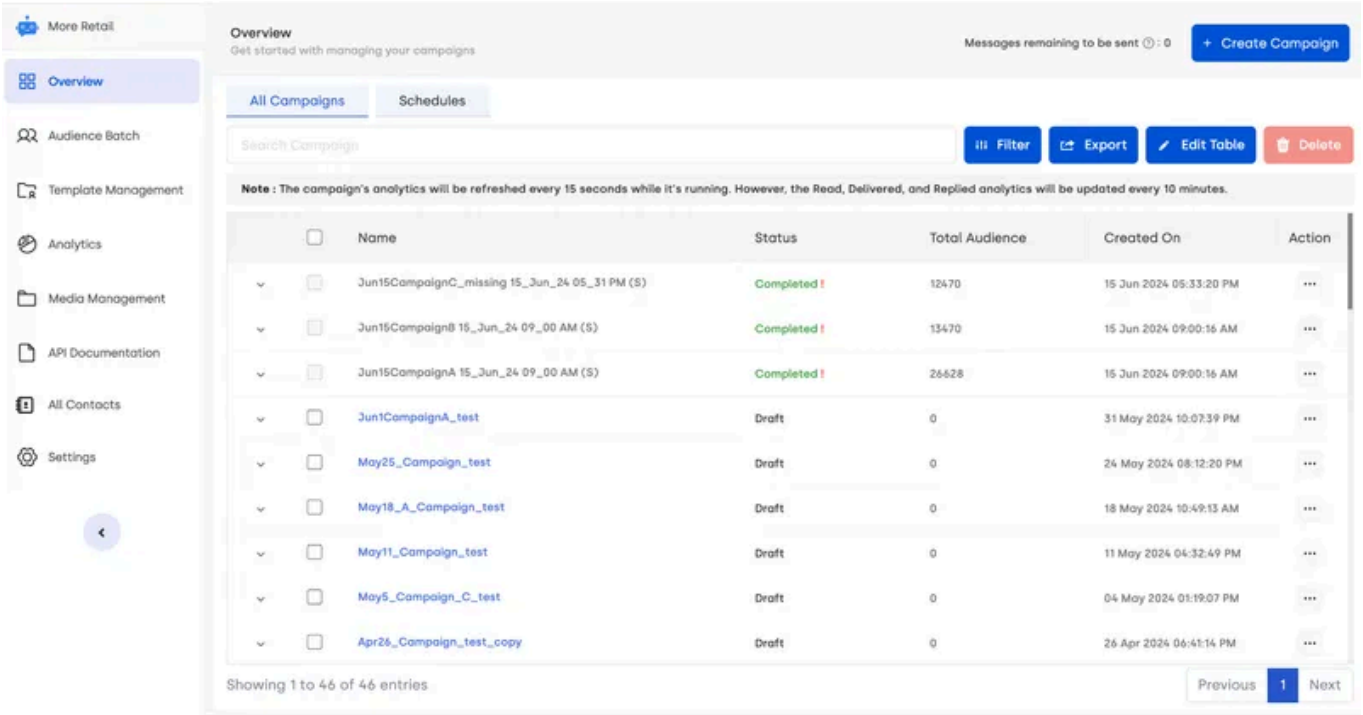
- Save changes. The campaign console validates credentials and activates for sending.

- Troubleshooting and settings for API credentials can be found in the dedicated Settings panel.

Overview Page Features

Navigation Menu

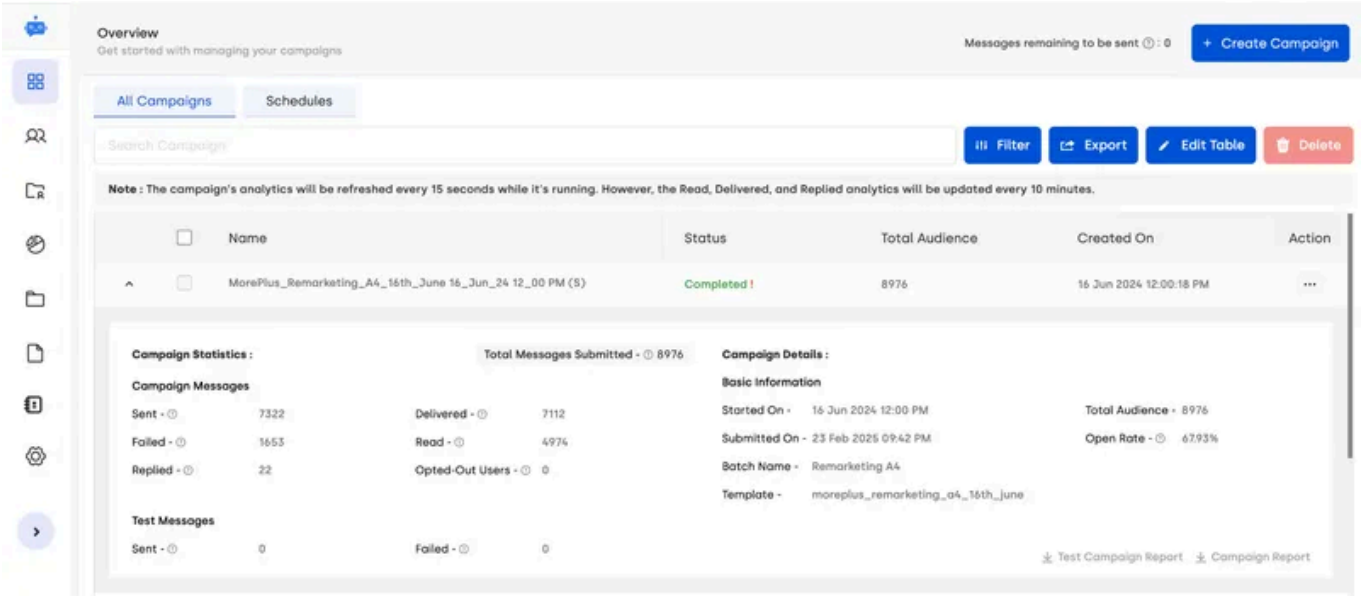
- Left navigation: Overview, Audience Batch, Template Management, Contacts, Analytics, API Integration, API Documentation, Settings. *(a few options will not be available in the v6 and below versions)*
- Top of dashboard: Active chatbot name.



Campaign List & Filters

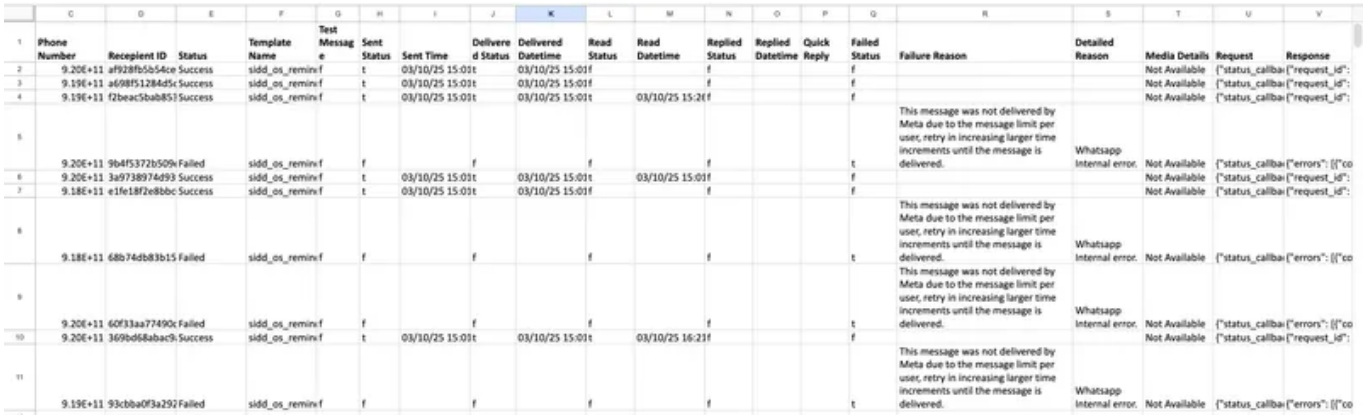
- You can see the Past and scheduled campaigns in a tabular list.
- You can Search by campaign name.
- Filter using date range and status.
- You can see the campaign details under each campaign by clicking on the arrow:
    - Campaign Stats: Sent, Delivered, Read, Failed, Replied.
    - Campaign Name
    - Template Name

- Audience Batch Name
- Date and Time



Actions & Export

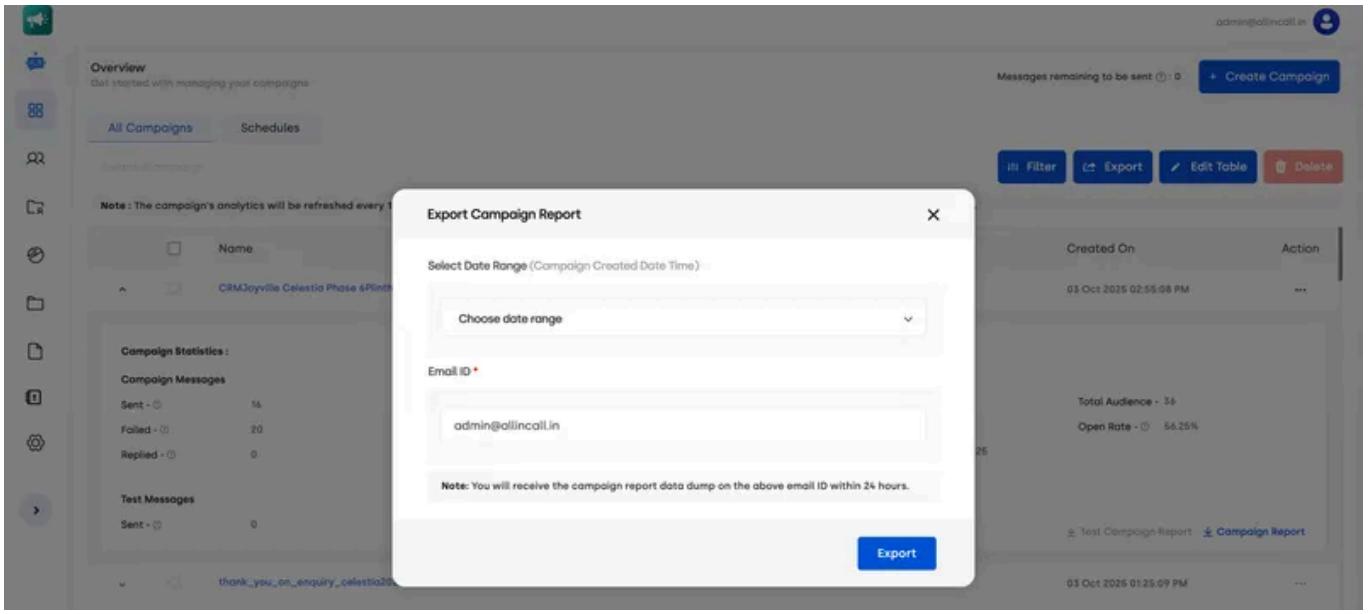
- **Action**: Campaigns have an Action feature, which has options like:
  - The draft campaign can be **edited** and resumed from where you had left off.
  - Completed Campaign can be cloned using the **Duplicate** feature at the same time for the duplicate steps.
  - Draft campaigns can be **deleted**.
- **Report**: A Campaign Level report is available to download, which provides the Campaign Analytics and User Level details.



Phone Number	Recipient ID	Status	Template Name	Test Message	Sent Status	Sent Time	Delivered Status	Delivered Datetime	Read Status	Read Datetime	Replied Status	Replied Datetime	Quick Reply	Failed Status	Failure Reason	Detailed Reason	Media Details	Request	Response
9.20E+11	af928fb5b54ce	Success	sidd_os_remin	f	t	03/10/25 15:01	t	03/10/25 15:01	f		f			f			Not Available	{"status_callba	{"request_id":
9.19E+11	a698f51284d5c	Success	sidd_os_remin	f	t	03/10/25 15:01	t	03/10/25 15:01	f		f			f			Not Available	{"status_callba	{"request_id":
9.19E+11	f2beac5bab851	Success	sidd_os_remin	f	t	03/10/25 15:01	t	03/10/25 15:01	t	03/10/25 15:2	f			f			Not Available	{"status_callba	{"request_id":
9.20E+11	9b4f5372b509	Failed	sidd_os_remin	f	f		f		f		f			t	This message was not delivered by Meta due to the message limit per user, retry in increasing larger time increments until the message is delivered.	Whatsapp Internal error.	Not Available	{"status_callba	{"errors": [{"co
9.20E+11	3a9738974d93	Success	sidd_os_remin	f	t	03/10/25 15:01	t	03/10/25 15:01	t	03/10/25 15:01	f			f			Not Available	{"status_callba	{"request_id":
9.18E+11	e1fe18f2e8bbc	Success	sidd_os_remin	f	t	03/10/25 15:01	t	03/10/25 15:01	f		f			f			Not Available	{"status_callba	{"request_id":
9.18E+11	68b74db83b15	Failed	sidd_os_remin	f	f		f		f		f			t	This message was not delivered by Meta due to the message limit per user, retry in increasing larger time increments until the message is delivered.	Whatsapp Internal error.	Not Available	{"status_callba	{"errors": [{"co
9.20E+11	60f33aa77490c	Failed	sidd_os_remin	f	f		f		f		f			t	This message was not delivered by Meta due to the message limit per user, retry in increasing larger time increments until the message is delivered.	Whatsapp Internal error.	Not Available	{"status_callba	{"errors": [{"co
9.20E+11	369bd68abac9	Success	sidd_os_remin	f	t	03/10/25 15:01	t	03/10/25 15:01	t	03/10/25 16:21	f			f			Not Available	{"status_callba	{"request_id":
9.19E+11	93cbba0f3a292	Failed	sidd_os_remin	f	f		f		f		f			t	This message was not delivered by Meta due to the message limit per user, retry in increasing larger time increments until the message is delivered.	Whatsapp Internal error.	Not Available	{"status_callba	{"errors": [{"co

- **Export**
  - Export Campaigns data by selecting date and filter: exported as email CSV.

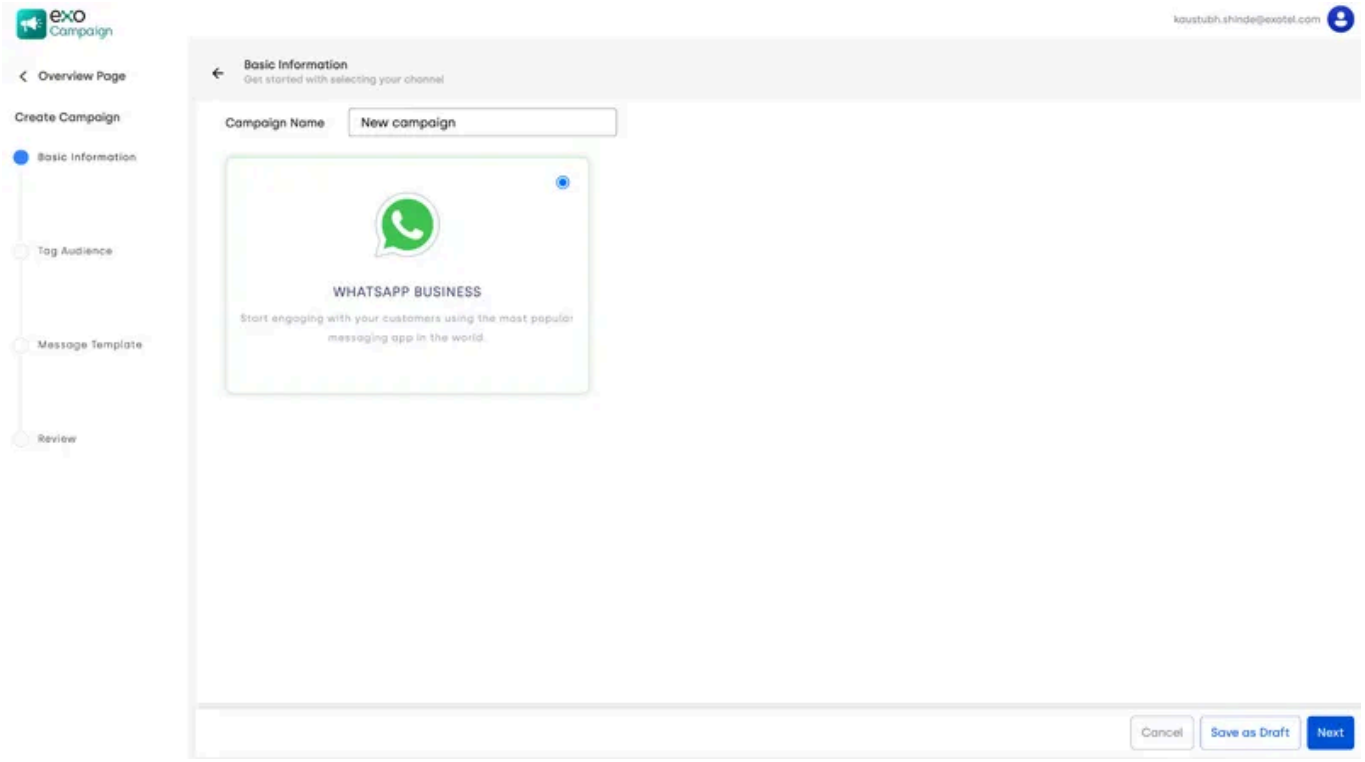
- This will provide a detailed report about the Campaigns with campaign-level Stats and user-level details with Sent, Delivered, Read, Replied & Failed Details and timestamps.



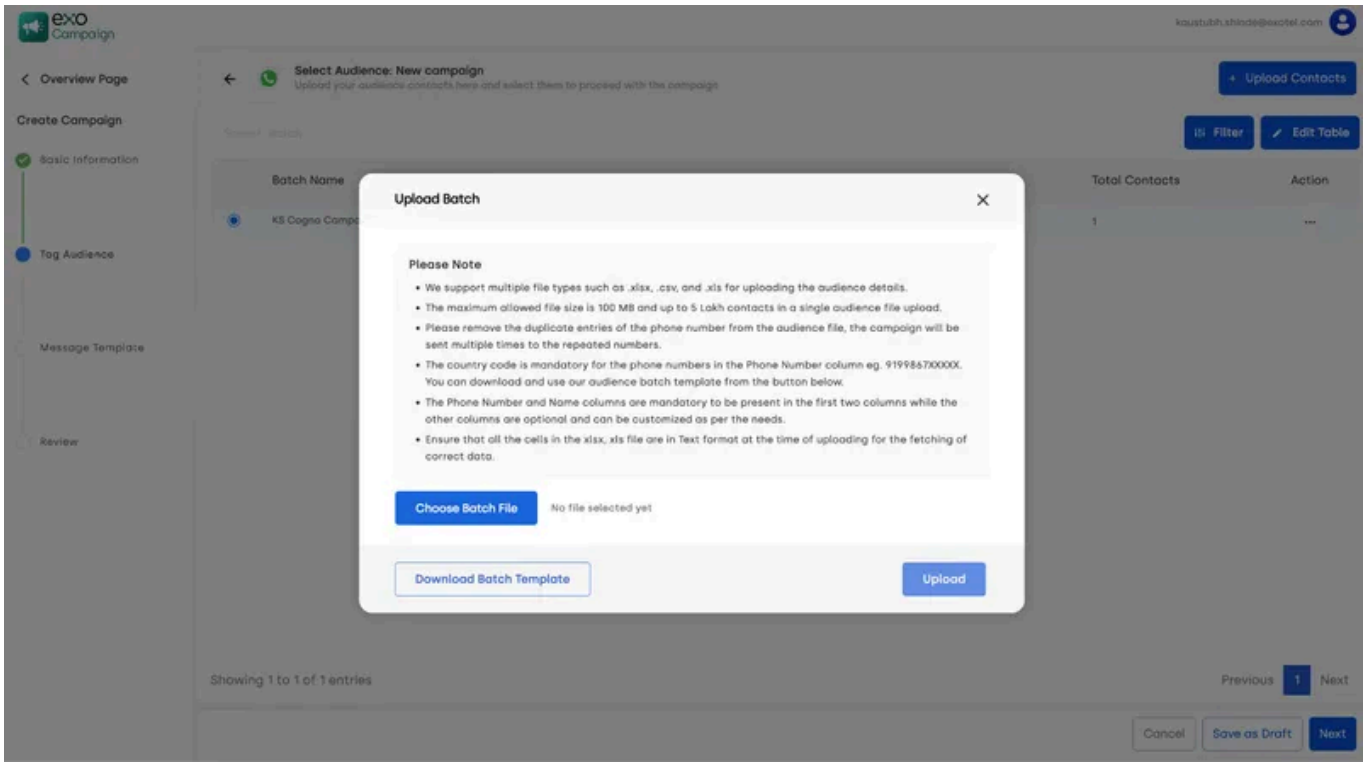
Creating a Campaign

Please note: A few options will not be available in the v6 and below versions. Please reach out to your Account Manager for more details.

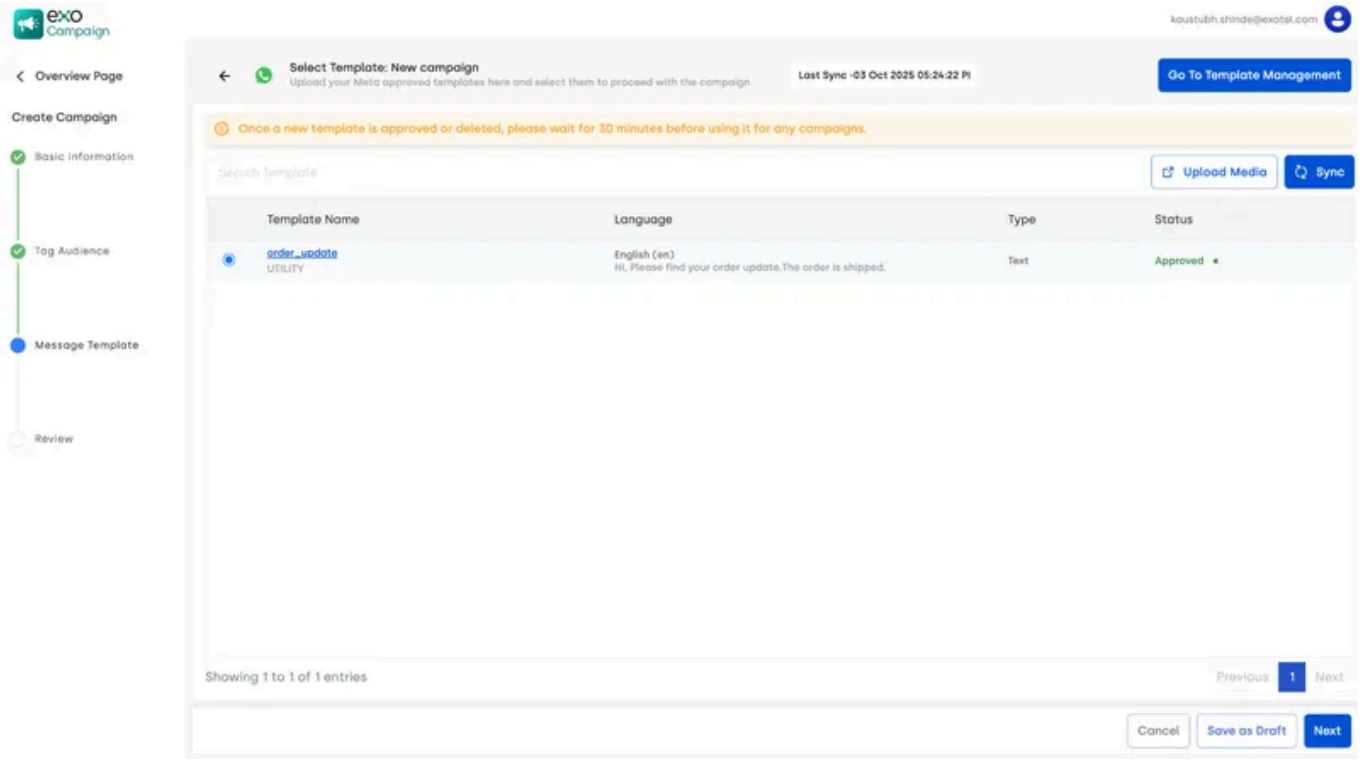
- Click **Create Campaign** to start the wizard.
- **Basic Information**:
  - Select channel (WhatsApp Business).
  - Enter a unique campaign name.
  - Save as draft or continue.



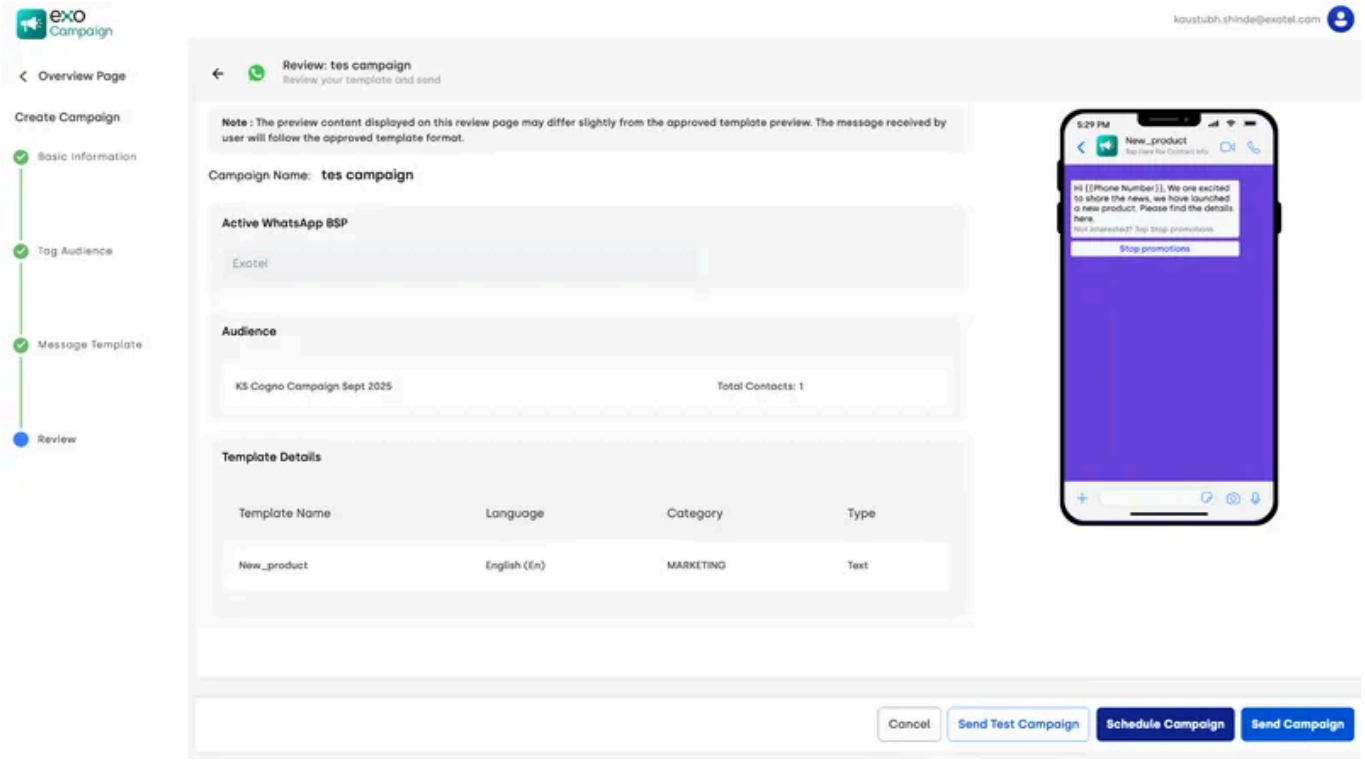
- **Tag Audience/Audience Batch**:
  - Upload or select batch; supported formats: .xlsx, .csv, .xls. Maximum size: 100MB up to 500,000 contacts.
  - UI shows upload controls and validation status.
  - You can download the Audience Batch file and fill in your audience details
    - Mandatory: country-coded phone number.
    - Optional: name, email, custom fields. Use the provided template file (download button shown).
  - Remove duplicates or invalid numbers manually or by using the deduplication feature.
  - Preview the first rows before confirming.
  - Provide the Name and save the audience batch.



- **Message Template Selection**:
  - Select pre-approved Meta templates (dashboard table shows status: Approved/Pending).
  - **To create a new template**:
    - Use the **Template Management panel**, select type/category, and enter content (header, body, footer, CTA). Details explained in the section below.
    - Preview and assign variables from the audience batch (column-variable mapping UI shown).
    - Only templates with matching variables will send personalized messages.
  - For media templates: Upload/host media; enter URL/ID for images, videos, docs (see allowed formats—JPEG/PNG up to 5MB, MP4 up to 16MB, PDF up to 64MB; dashboard panel presented for upload and preview).



- **Review & Schedule**:
  - Confirmation page previews all selections - BSP, audience, template, campaign details.
  - Option to send immediately, schedule by date/time, and recurring campaign controls.
  - Send a test campaign to validate.
  - Finalize or save changes.

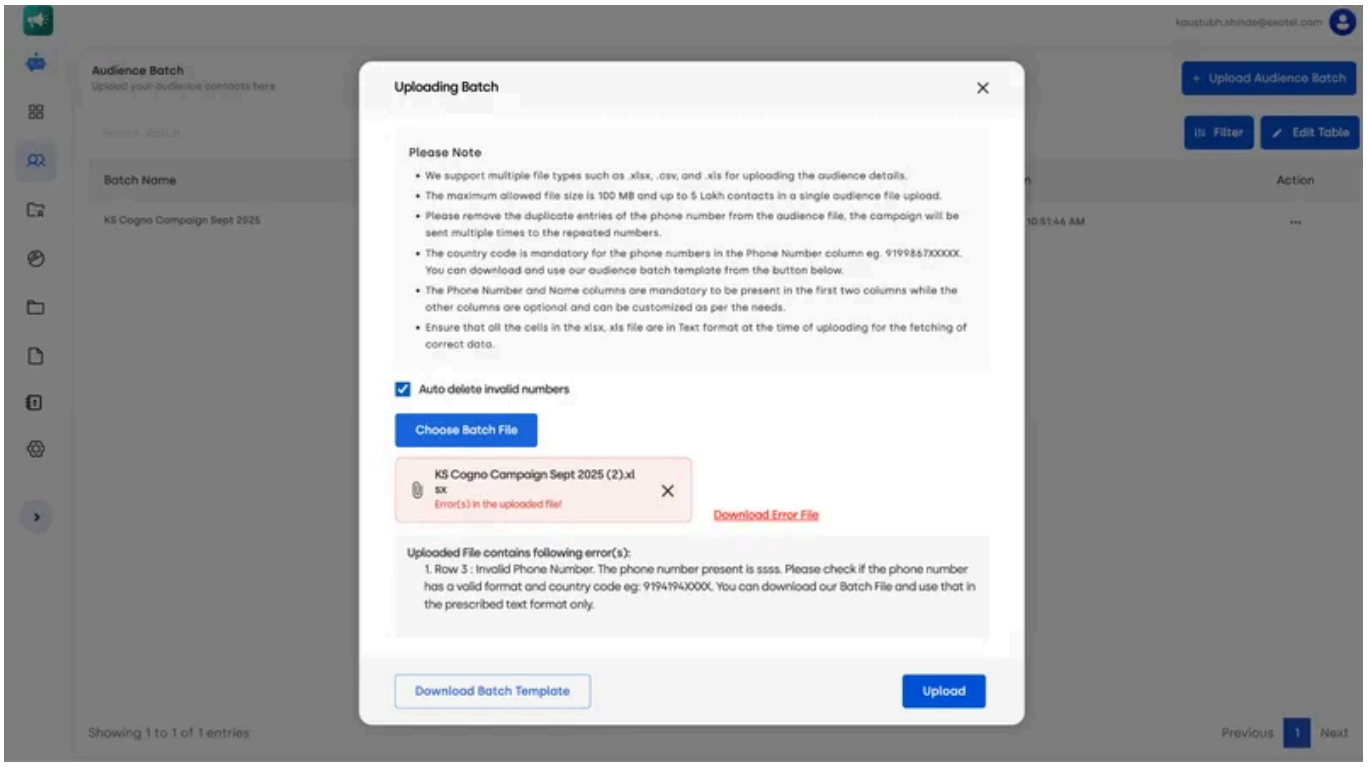


This completes the Campaign creation process.

We have dedicated sections for Audience, Template & Media Management in the console, explained below.

Audience Batch Handling

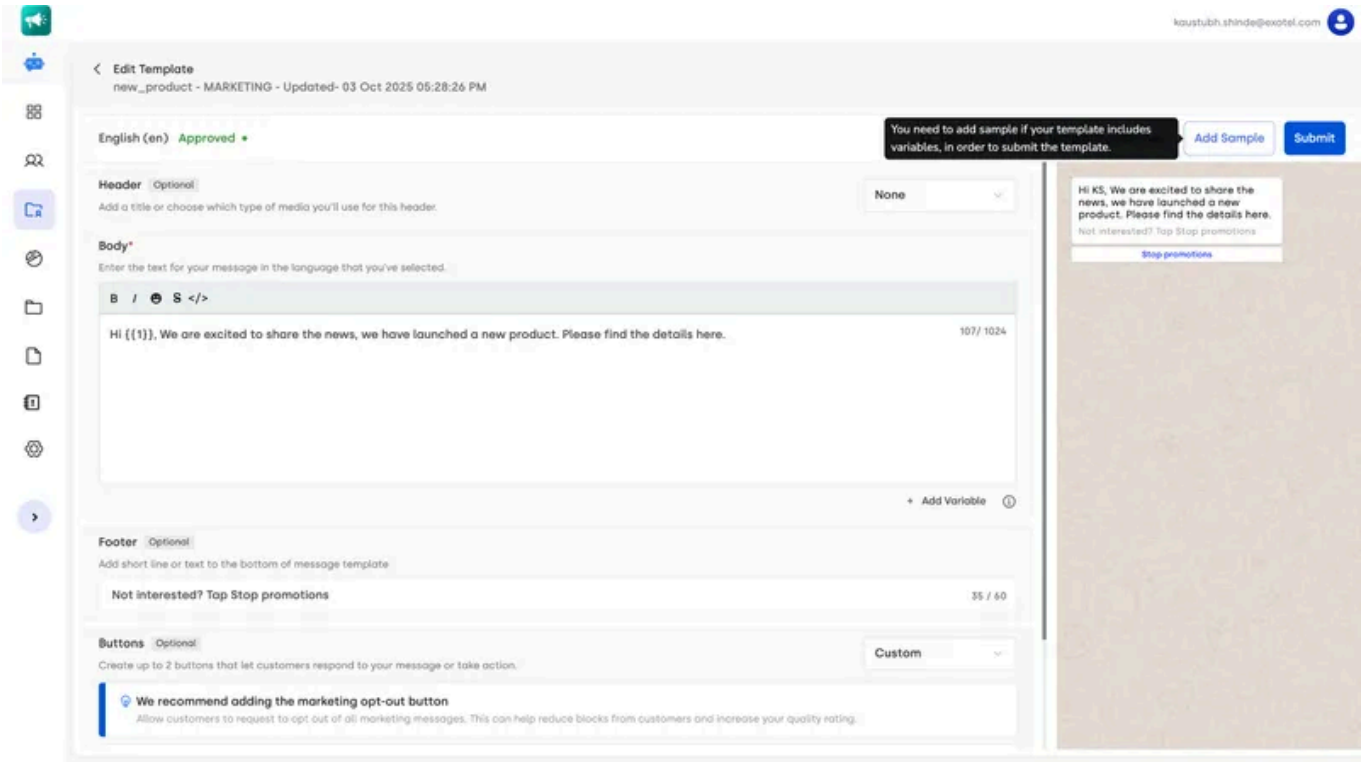
- Audience batch is managed via both the wizard and a dedicated section. The functionality is the same.
- Errors surfaced for invalid formats, duplicate numbers, or missing country codes.



- UI enables quick fixes and restarts with sample templates/files.
- Only one batch selectable per campaign, historical batches reused for future runs.

Template Management

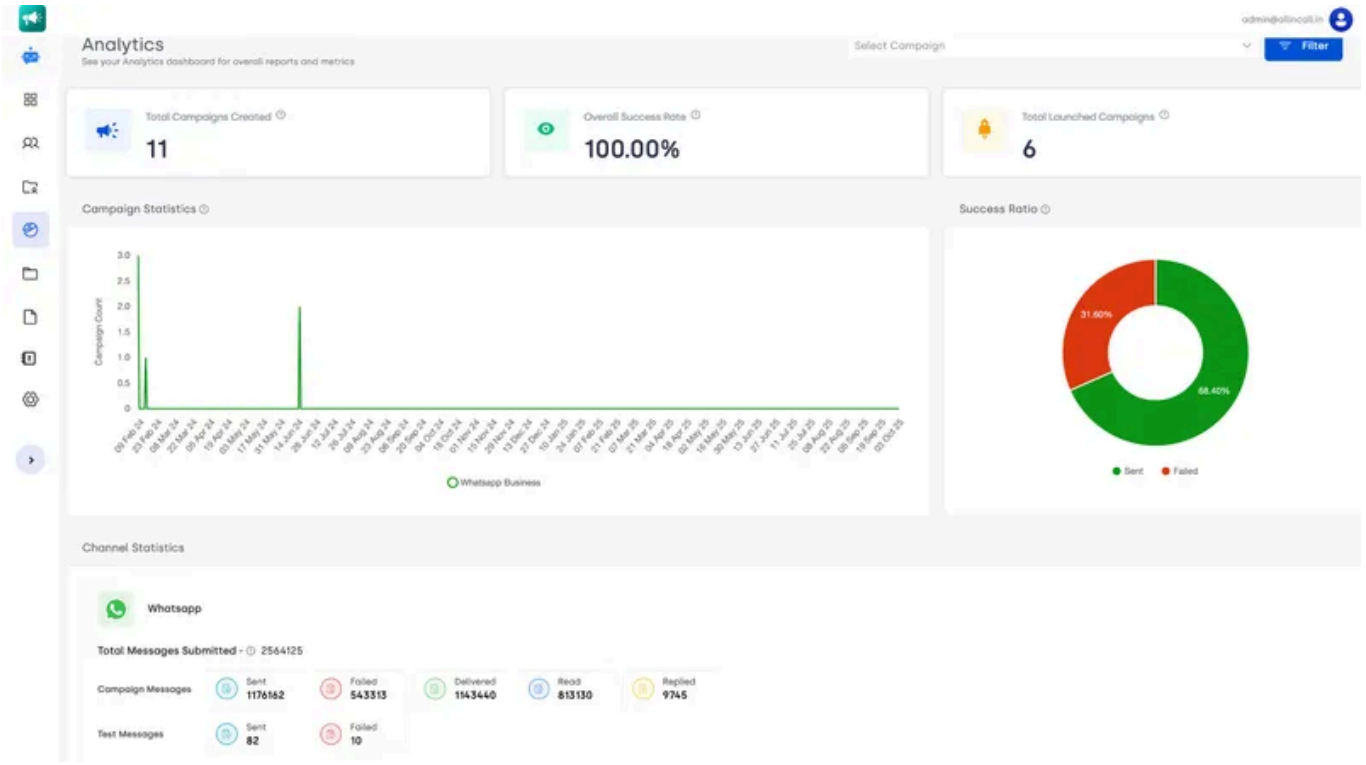
- All templates must be approved by Meta for campaign use.
- **For older versions**: manual file upload for template format, entry of header/body/footer type, and button specs.
- **For newer versions**: streamlined template button (Create Template), live preview, sample/media/variable configuration in-template.



- Table view lists available templates: Search, sync, upload new, and delete old.
- Assign variables to columns: Fill template category, body, and buttons as per Meta requirements.
- Wait 2-5 minutes after submission before using a template for sending campaigns.
- Button mapping and variable linkage are checked during the campaign review step.

Analytics & Reporting

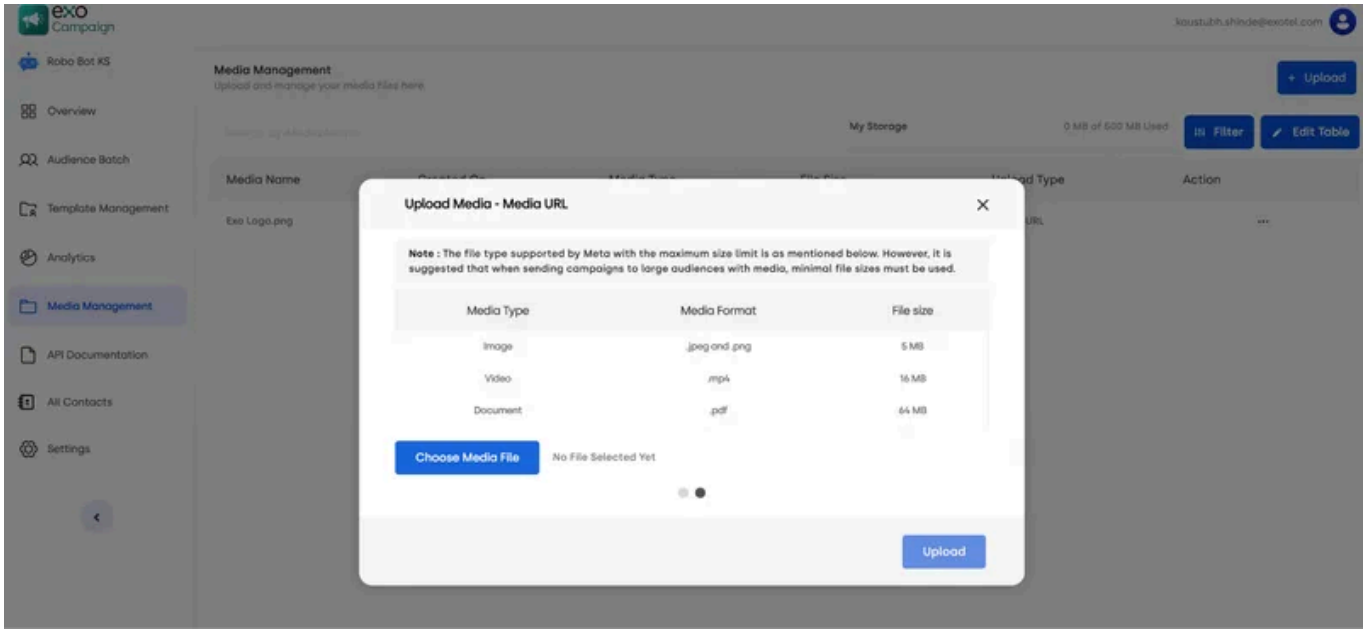
- The analytics dashboard is accessed from the left navigation.
- Date range selector for viewing campaign metrics.
- Main metrics: campaigns created, launched, delivery ratio, replies, fail/success by channel (WhatsApp, SMS, etc.).
- Line and bar graphs visualize delivery rates, open/read, reply, and conversion (as shown in PDF images).



Media Management

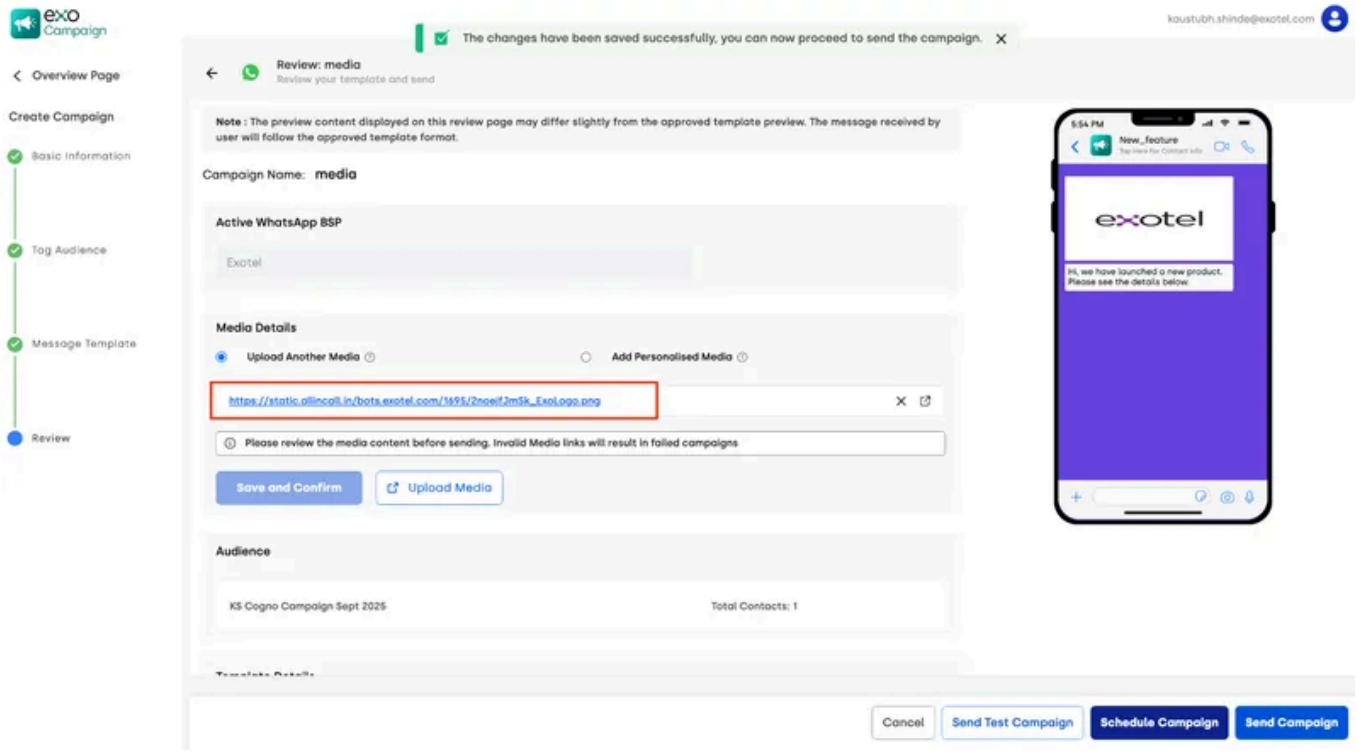
Please note: Not available in the v6 and below versions. Please reach out to your Account Manager for more details.

- Upload media files from the dashboard panel - UI shows uploads, used vs. available storage.



- Supported formats: JPEG, PNG, MP4, PDF (with size limits).
- Preview media before campaign launch, invalid links flagged during review.

- Personalize content with mapped variables and user-specific imagery.
- Public hosting is required for successful delivery and reporting.
- Please make sure you use a publicly hosted media URL while sending the campaigns and do not rely on auto-generated Meta's Media URL, as it's a Sample Media with view-only.
  Read more here - **How Media Templates Work on WhatsApp Campaigns**



All Contacts

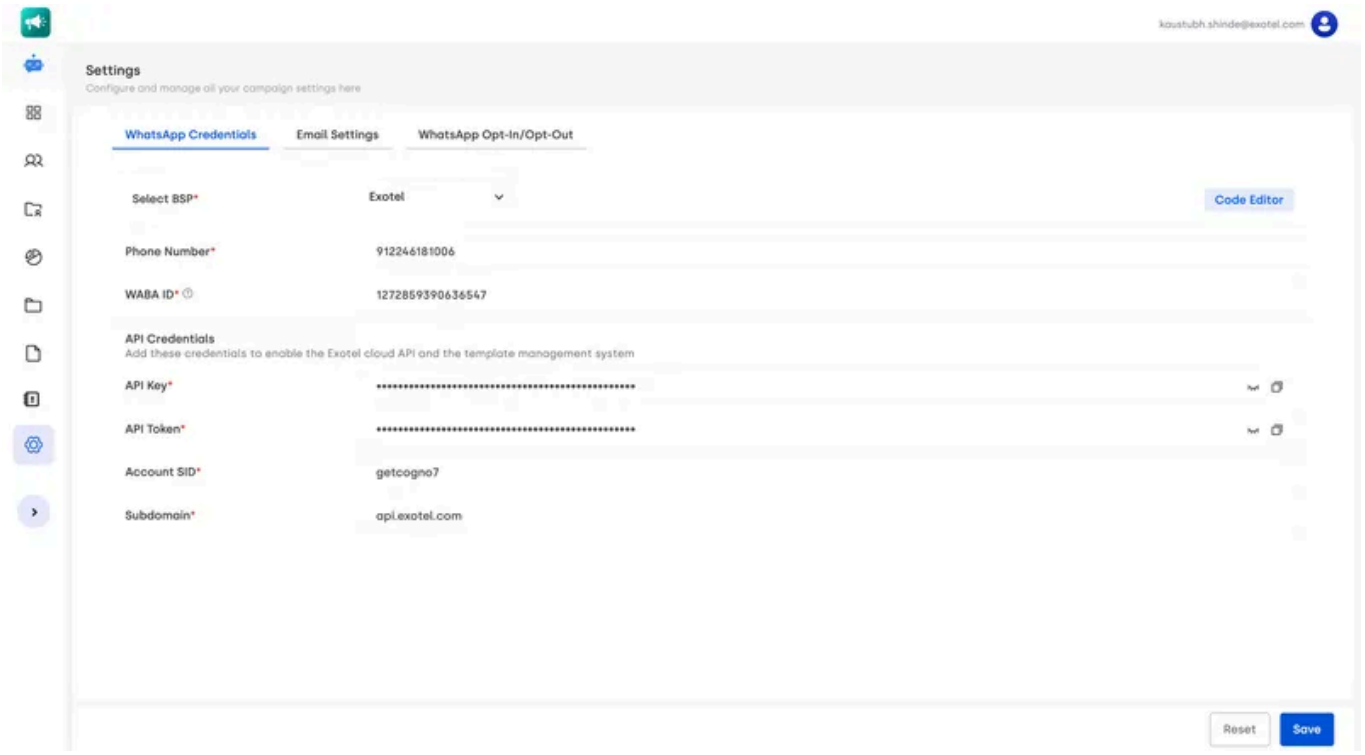
Please note: Not available in the v6 and below versions. Please reach out to your Account Manager for more details.

- Full contact database supports search by name and number.
- This section is enabled only if you are using the in-house Opt-in/Opt-out management system.
- The contacts are stored only after the Opt-in/Opt-out management is enabled and used to track the user-level Opt-in details.
- The user can export the Opt-Out data for editing future Marketing Campaigns.

Settings

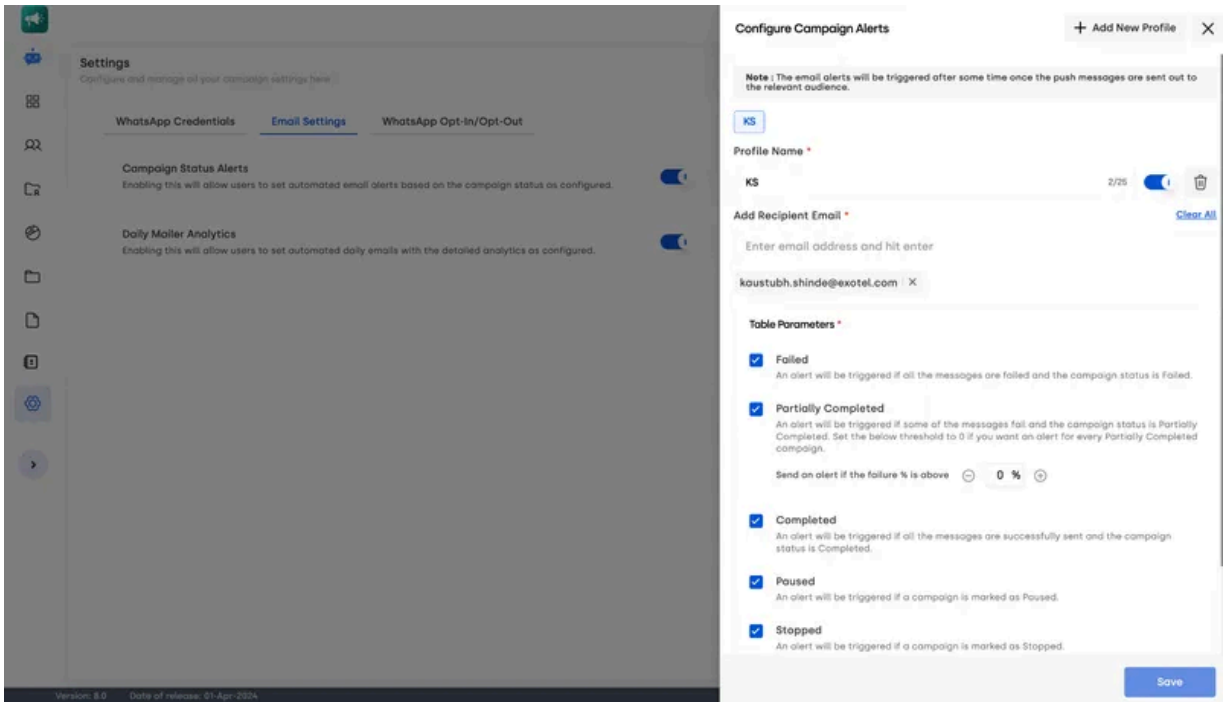
WhatsApp Credentials:

Configure the WhatsApp Number Credentials

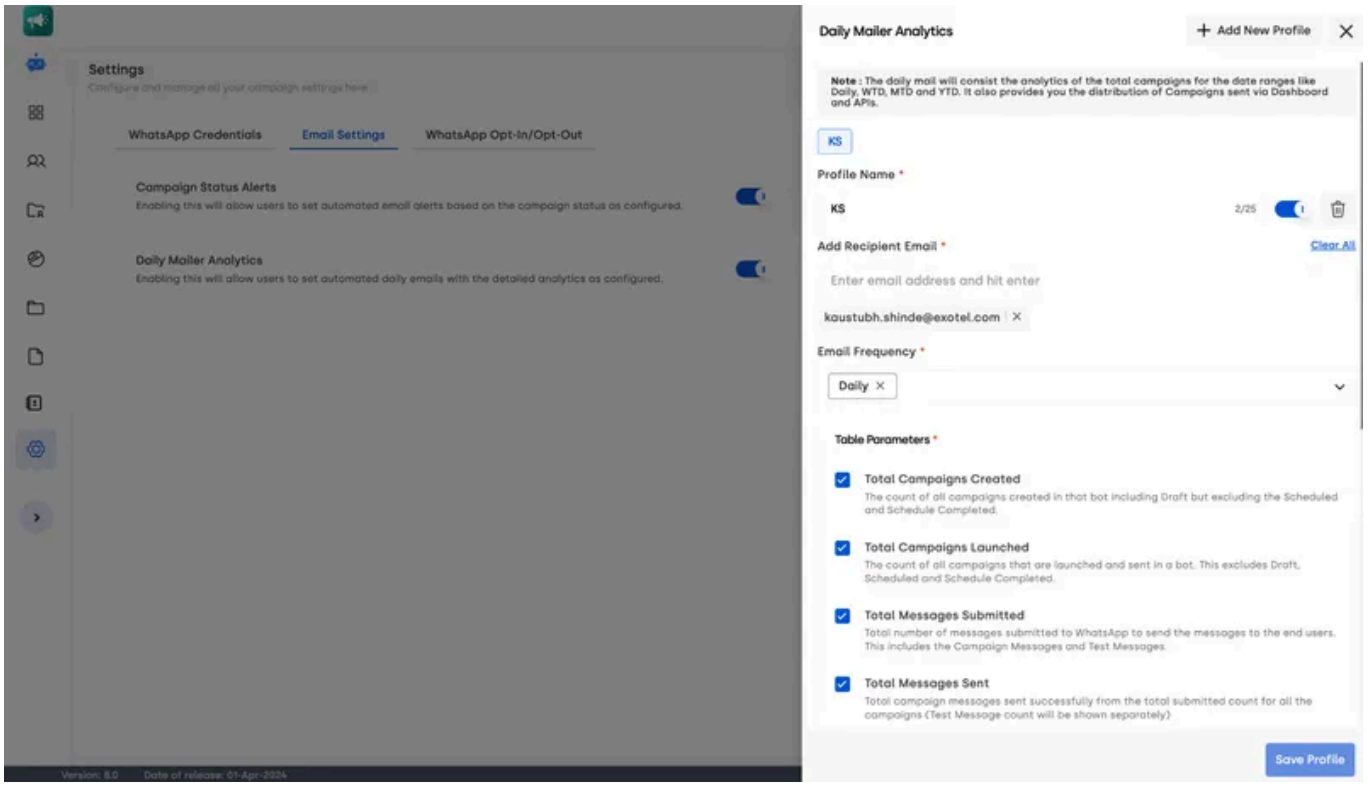


Email Settings:

- **Campaign Status Alerts**
  - **Purpose:** Real-time updates for campaign managers on campaign progress.
  - **How to Use:** Go to Email Settings > Status Alerts.
    - Add one or more profiles; each profile supports multiple email addresses.
    - Choose alert events (completed, failed, etc.).
    - Upon each campaign status change, an email update is sent to the added profiles.

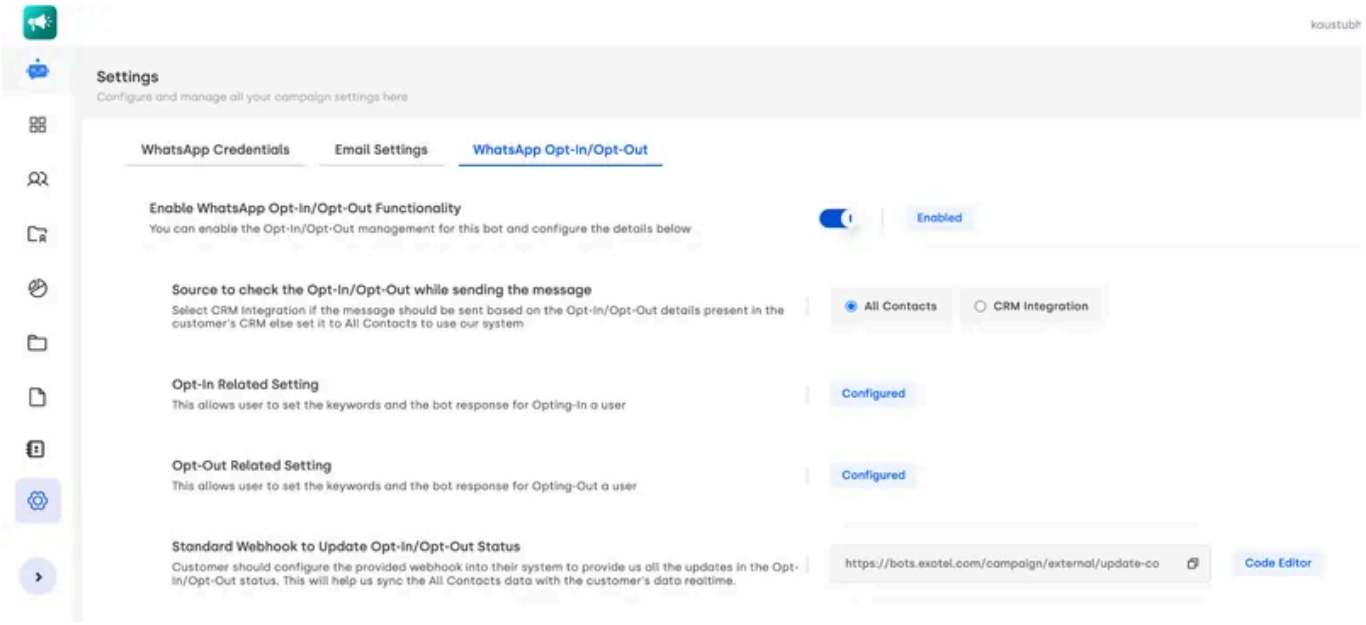


- **Daily Mailer Analytics**
  - **Purpose:** Automated delivery of campaign performance summaries.
  - **How to Use:**
    - In Email Settings, locate Daily Analytics configuration.
    - Set frequency: daily, weekly, or monthly.
    - Assign recipients - multiple profiles and email addresses permitted.
    - Emails include summary stats and analytics for recent campaigns.
  - **Expected Behavior:** Provides ongoing visibility into campaign efficacy; managers can track and analyze trends over time without manual logins.



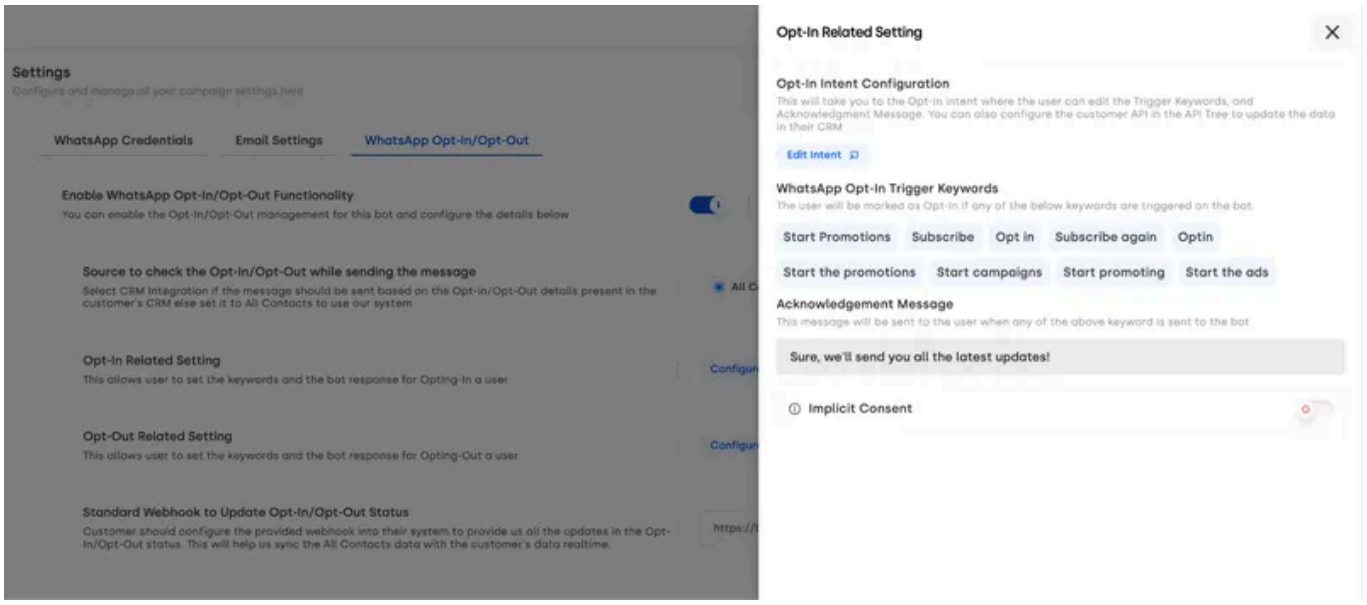
WhatsApp Opt-In/Opt-Out Management

- **Purpose:** Ensure compliance and improved user experience by managing contact permissions for WhatsApp messages (initially disabled; can be enabled).
- **How to Use:**
  - Enable the feature in Settings.
  - Choose a source for opt-in/opt-out checks:
    - **CRM Integration:** Send only to users marked opted-in on the customer's CRM.
    - **All Contacts:** Use the platform's contact list, opt-in flags controlled in Cogno.
- Configure opt-in/opt-out rules, keywords, and synchronization webhooks.



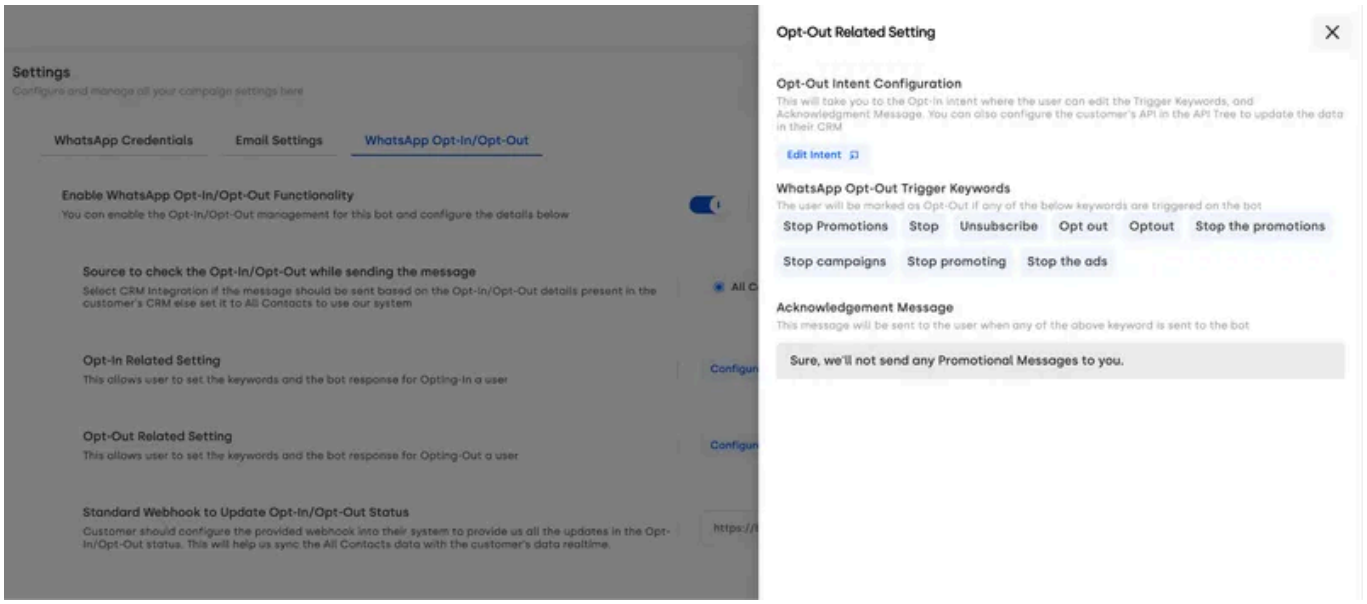
Opt-In Related Settings

- **Purpose:** Configure triggers and bot response for user opt-in.
- **How to Use:**
  - Enter keywords (e.g., Subscribe, Opt-In, Interested) that will signal an opt-in request from users.
  - Set the acknowledgment message users will receive upon opt-in.
  - Use the Opt-In Intent creation tool in the chatbot to refine triggers and responses.
  - (Advanced) Integrate with APIs via the API Tree for direct updates to the customer's CRM.
- **Expected Behavior:** When users send opt-in keywords, they are instantly marked as eligible for future WhatsApp communications, and the CRM or system updates accordingly.



Opt-Out Related Settings

- **Purpose:** Configure triggers and bot response for user opt-out.
- **How to Use:**
  1. Enter keywords (e.g., Unsubscribe, Opt-Out, Not Interested) for opt-out requests.
  2. Set an acknowledgment message confirming opt-out status.
  3. Create an Opt-Out Intent on the chatbot to manage these triggers.
  4. Enable real-time sync with external CRM via custom API or standard webhook.
- **Expected Behavior:** Users sending opt-out keywords are marked to stop receiving messages, acknowledgment is sent, and the CRM/system is updated in real time, and no future communications will be sent to these users.



API Documentation

Details are available in this document:

- For latest version v7 & v8: **WhatsApp Campaign API**
- For older versions: Please reach out to your account managers

12.3.1.1. How Media Templates Work on WhatsApp Campaigns

Sample Media vs Actual Media

When you create a WhatsApp media template on the Meta Console, you are required to upload a **sample media file** (image, video, or document).
This file is **only used by Meta during the template approval process** and to generate a **temporary preview URL**.
It is **NOT** the media that will be sent to end-users during your campaigns.

This is one of the most common misunderstandings about media templates, so please read this section carefully.

Creating a Media Template on Meta Console

When creating a template:

- You upload a **sample media file** on the Exotel console or on the Meta console.
- Meta uses this media only for **review**, **layout validation**, and **preview**
- Meta stores this file as a **temporary CDN media**, typically in a format like:

```
https://scontent.xx.fbcdn.net/...
```

Important: This sample media file is never sent to your customers. It cannot be used as the actual media in campaigns.

The sample URL:

- Is temporary and it expires
- It is not publicly accessible
- Cannot be used in real message delivery
- Will be rejected by Meta if passed during the Send API

- Should only be used for preview inside our dashboard

What Happens in the UI (Campaign Dashboard)

Template Selection

When you select a media template inside our Campaign Dashboard:

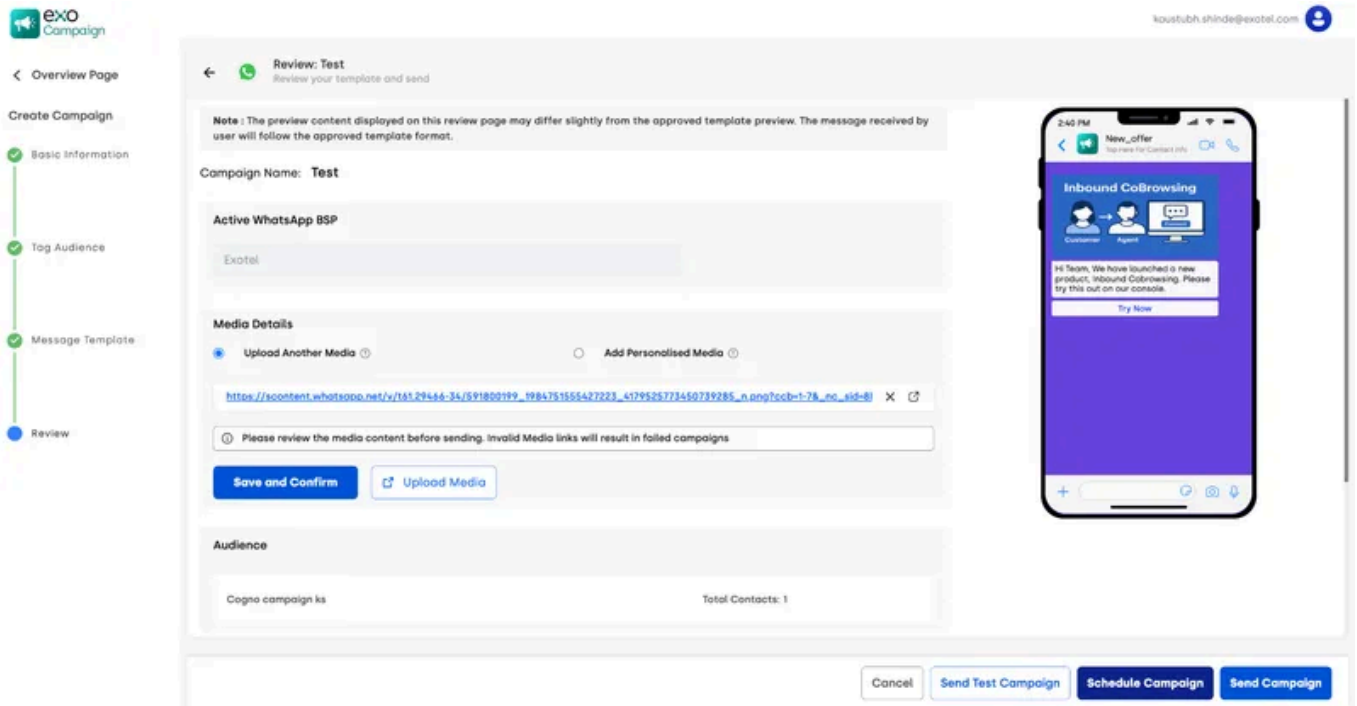
- We fetch the template using Meta's API
- We display the media using the **temporary Meta CDN URL**
- The preview on the right side is **view-only**

This preview helps you confirm the layout of the template before sending.

Final Step: Mandatory Media URL Input

On the final step of the campaign creation:

- We **pre-populate** the preview URL using Meta's CDN URL only for reference
- This helps you visually verify that you are working with the correct template
- But you must replace this URL with an actual, valid public URL before sending



Why?

Meta **does not** accept its temporary preview URLs when delivering real messages. Using the preview URL (https://scontent.xx) will cause **campaign failure**.

What Is a "Valid Media URL"?

Your media URL must meet Meta's delivery requirements:

- **Publicly accessible** (no login, no session token)
- **Served over HTTPS**
- **Permanent / non-expiring**
- **Correct file format** (JPEG, PNG, PDF, MP4 depending on template type)

Invalid URLs include:

- scontent.xx.fbcdn.net/... (Meta preview URL)
- URLs behind authentication
- URLs with IP whitelisting
- File paths (e.g., C:/Users/...)
- Expiring file-sharing links (Google Drive/private S3 links without proper ACLs)

How to create a Valid Media URL?

You can host the media file in any publicly available servers (your in-house s3) or using Our In-House Media Management Feature (Recommended)

To simplify valid media hosting, we offer a built-in **Media Management** feature.

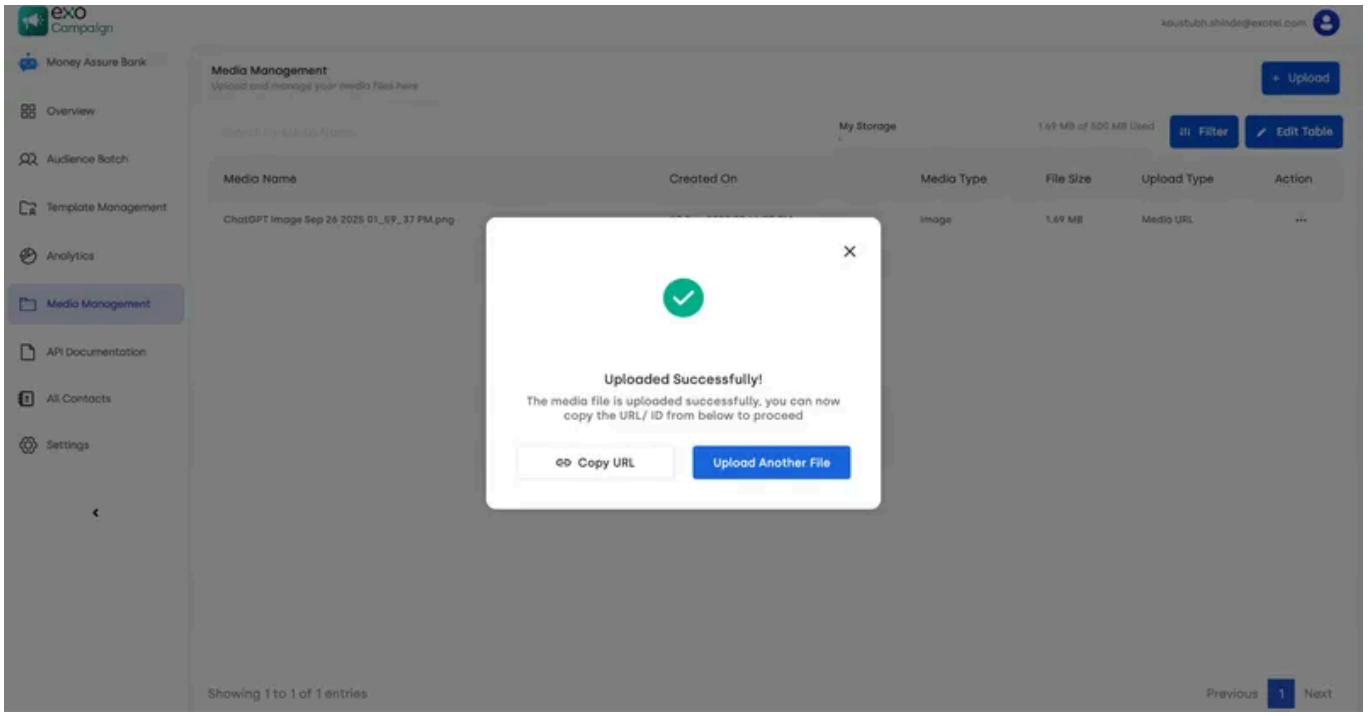
You can use it to:

- Upload your media file once
- Generate a **permanent, public, HTTPS media URL or Meta ID**
- Reuse the same URL across multiple campaigns

- Avoid re-uploading files repeatedly
- Use the same URL in both **UI campaigns** and **API campaigns**

Steps:

1. Go to **Media Management**
2. Upload your image/video/document
3. Copy the generated media URL
4. Paste it in the Campaign Builder while sending your template
5. Save and reuse for all future campaigns



This ensures **100% compliance** with Meta's media delivery guidelines.

UI Users: Mandatory Rule for UI Users

- If your template contains media, providing a valid media URL is mandatory.
- You must replace the default scontent.xx preview URL with your valid hosted URL.
- Campaigns will fail if you skip this.

Our system cannot use the preview media provided during template creation because Meta does not allow it for outbound delivery.

API Users: How to Send Media Templates Correctly

For API-based campaigns:

- The same rules apply
- Meta **requires** a valid public URL in the API request
- The media file from template creation is **not considered** during API sends
- Refer to the APIs - **Send Campaign APIs**

API Requirement

You must populate the media parameter:

Example (Image Template):

```
curl --location -g 'https://{{base_url}}/campaign/external/push-campaign/' \
--data '{
   "campaign_name": "campaign_name",
   "batch_name": "batch_name",
   "template_name": "template_name",
   "language_code": "English (en)",
   "whatsapp_bsp": "1",
   "media_send_type": "static",
   "media_url":"media_url",
   "channel_id": "1",
   "client_data": [
   {
   "phone_number": "+91920XXXXXX46",
   "name": "Ram"
   },
   {
   "phone_number": "+91920XXXXXX46",
   "name": "Shayam"
   }
   ]
}
'
```

Important for Developers

- media_url or the header media link is **mandatory**
- Do not send the default Meta CDN URL
- Do not assume the media uploaded during template creation will be reused
- Always host the image or use our **Media Management** URL

13. Customer Management

13.1. Customer Data Management

13.1.1. Customer Records Management

Overview

The **Table** functionality, found under System Configuration, is the Administrator persona for defining the structure and usage of customer-related data (metadata) across the platform. It ensures that customer attributes are consistently defined, managed, and consumed by campaigns, agents, and reporting modules.

The configuration is organized into the following key tabs: **Table Definition, Agent Table Definition, Mapping, Filter,** and **Filter Groups.**

Navigation

The Table configuration features are managed by the Administrator (or Voice-Admin) at the system level.

- **Administrator Console/Voice-Admin Console** > **System Configuration** > **Table**.

Table Definition

The **Table Definition** sets up the core schema for storing customer information, defining the structure of the data table.

Parameter	Description	Constraints & Options
Table Definition Name	A unique name for the data structure.	Only the underscore character (`_`) is allowed.
Name (Column)	The field name within the data table.	Only the underscore character (`_`) is allowed.
Type (Column)	The data format expected for the column.	**Varchar**, **Integer**, **Numeric**, **Boolean**, **Date**, **Time**, **Timestamp**.
Non-Unmaskable	Marks the field for **number masking** at the UI, Customer Manager API, and database backend.	Cannot be set as a **Primary Key** or **Unique Key**.
Unmaskable	The values of this field will *not* be masked.	-
Nullable	Allows the field to be left blank (data entry is optional).	-
Unique Key	Ensures all values in the column are unique.	-
Primary Key	Designates the column as the primary identifier.	-

Note: Existing column names, types, or properties cannot be modified or deleted once created.

Agent Table Definition

The **Agent Table Definition** acts as a template to customize how customer information is displayed and managed by agents in their respective consoles.

- **Purpose:** Allows the Administrator to assign a **subset of fields** from the master **Table Definition** to specific agents or campaigns.
- **Visibility Control:** Agents will only be able to see, access, or modify customer information for the fields explicitly assigned to them in this definition.
- **Permissions:** For each assigned column, the Administrator sets permissions:
  - **Read Only:** Agents can only view the data.
  - **Read & Write:** Agents can view and modify the data.
- **Campaign Usage:** The Agent Table Definition of the **Interaction Campaign** is used on top of other definitions if the agent is staffed to multiple campaigns, including an Interaction Campaign.

Mapping

Table Mapping is a configuration that links the defined data fields to internal system attributes, determining their function in a specific campaign type (e.g., if a field is searchable or acts as a phone number).

Mapping Sequence	Purpose	Licensable Limit
Phone	Used for mandatory columns, typically for phone numbers.	Up to 50 fields.
Searchable	Makes the column searchable within the system (e.g., in the telephony panel).	Up to 10 fields.
Filterable	Allows the field to be used as an attribute for filtering in reporting and lead management.	Up to 10 fields.

Filter and Filter Groups

The **Filter** and **Filter Group** functionalities are crucial components of Lead Management, offering sophisticated control over which customer records (leads) are presented to agents in outbound calling campaigns. Both features **cannot be used simultaneously**; in Lead Management, you can use only one tab: **"Manage Filters"** or **"Manage Filter Groups"**.

Filter (Individual Rule-Set)

Filters are individual, condition-based rules used to screen customer leads based on specific criteria.

Aspect	Description
Purpose	To screen customers in **Outbound Voice**, **Parallel Predictive**, and **Voice Blast** Campaigns, ensuring only specific records are presented for dialing or analysis.
Configuration	Filters are built using **Attributes** (e.g., `ATTEMPTS`, `DISPOSITION`, `LAST_DIALED_TIME`, `LAST_USER_ID`) and **SQL Criteria** (operators like `=`, `>`, `<`).
Use Cases	**Managing Attempts:** Exclude leads dialed more than five times. **Excluding Failures:** Exclude leads with dispositions like 'Wrong Number'. **Time-Based:** Only dial leads last attempted before yesterday.
Benefits	**Enhanced Lead Quality** by filtering ineffective leads. **Operational Efficiency** by minimizing wasted dialing attempts.

Filter Groups (Tiered Priority Dialing - Licensable)

Filter Groups allow multiple individual Filters to be aggregated and prioritized, enabling sophisticated, tiered lead selection for **next-level prioritization** of dialing leads.

Aspect	Description
Licensable Feature	Filter Grouping is a licensable feature used to achieve priority dialing.
Hierarchy	Single or Multiple Filter Groups can be created at both **System-level** (by the Administrator) and **Campaign-level** (by the Supervisor). System-level groups can be assigned to Outbound, Parallel Predictive Dialing, and Voice Blast Campaigns.
Usage	If **Filter Group** is activated in the campaign's "Customers" Tab, the Supervisor can only access the **"Manage Filter Groups"** tab under **Manage** > **Lead Management**.
Use Cases	**Priority Dialing:** Create **Tier 1** for "Hot Leads" (dial first) and **Tier 2** for "Warm Leads" (dial after Tier 1 is depleted). **Segmentation:** Group filters based on demographics or geographical region for targeted dialing.
Benefits	**Superior Prioritization** by processing leads in an ordered, tiered manner. **Centralized Management** with groups created at the system level and assigned across multiple campaigns.

Usage Across the Product

The data schema and filtering defined in the "Table" configuration impact the platform across multiple user roles:

1. **Agent Interface / Customer Information View:**
    - The **Agent Table Definition** dictates which fields are visible and whether an agent has **Read Only** or **Read & Write** permissions for the customer data displayed during a call or chat.
2. **Outbound Dialing Campaigns (Lead Management):**
    - **Table Filters** and **Filter Groups** are the primary mechanisms for selecting and prioritizing leads in outbound campaigns.

- Fields defined as **Searchable** and **Filterable** in **Table Mapping** are used within the Lead Management functionality to segment customer lists for operations like lead churning.

3. **Real-Time Monitoring (Supervisor/Analyst):**
   - In the Agent List view of **Live Monitoring**, the column **Table Filters** can display the table filter name that was applied to the leads.
4. **Reporting (Supervisor/Analyst):**
   - Performance reports such as **ACD Abandon Call Detail** and **Call Details Report** include columns that track lead segmentation: **Table Filters**, **Applied filter group**, and **Other Filter Groups**. This allows for the analysis of call data based on the specific lead rules that were in effect.

13.1.2. Customers / Lead Filtration

Overview

The **Customers Tab** is a critical feature within the campaign settings (typically for Outbound, Parallel Predictive Dialing, and Voice Blast campaigns) that controls which customer records are eligible for dialing. It facilitates **lead filtration** by allowing the Administrator/Supervisor to apply pre-defined rules, ensuring only specific segments of the customer database are accessed by the dialer.

Key Benefits

- **Targeted Dialing:** Ensures the campaign focuses only on customer segments that meet specific business criteria (e.g., location, last disposition, number of attempts).
- **Exclusion Management:** Prevents dialing numbers that do not meet the defined filtration standards.
- **Performance Optimization:** Filters out unfavorable records, potentially improving connection rates and agent efficiency.
- **Centralized Control:** Allows for the assignment of filters created either at the system-level by the Administrator or at the campaign-level by the Supervisor.

Functionality

The Customers Tab provides mutually exclusive options for applying dialing rules: you can use **Filters** (individual rule sets) or **Filter Groups** (collections of rule sets), but **not both simultaneously**.

The tab is organized into two primary sub-tabs:

Filter Tab

This tab is used to assign individual, atomic filtration rules (Table Filters) to the campaign.

- **Source:** Filters shown here must first be created at the system level via **System Configuration → Table → Filters**.

- **Logic:** A filter contains conditions (clauses) based on specific customer data attributes (e.g., ATTEMPTS, DISPOSITION, phone1) using SQL criteria.
- **Assignment:** The available filters are moved from an "Available" list to an "Assigned" list to apply them to the campaign.

Filter Group Tab

This tab is used to assign a collection of pre-defined filters, allowing for complex, multi-layered filtration logic. For a full explanation of filter groups, fetch order, and the **configuration parameters** table, see **Filter Groups**.

- **Source:** Filter Groups must be created beforehand at the **System-level** or at the **Campaign-level**. Filter Groups created by the Administrator at the system level are designated as "System" type.
- **Flexibility:** Filter Groups can incorporate a **Fetch Order Policy** (a licensable feature) which dictates the sequence in which the dialer fetches numbers from the leads once the filtration criteria are met.
- **Administration:** The Supervisor **cannot delete** Filter Groups created at the System-level by the Administrator.

Prerequisites

- The campaign must be an **Outbound, Parallel Predictive Dialing, or Voice Blast Campaign**.
- The desired **Table Filters** or **Table Filter Groups** must be configured in the system beforehand.
- For advanced filtration, the number of Filter Groups applied per campaign is configurable up to a default limit (e.g., 10), which can be customized via backend configuration.

Usage Instructions (Assigning Filters/Filter Groups)

The goal is to move the desired filtering components from the "Available" section to the "Assigned" section for the active campaign.

Access the Customers Tab

1. Navigate to **Manage** → **Campaigns** and select the target **Outbound** or **Parallel Predictive** campaign.
2. Go to the **Customers** tab.
3. Select either the **Filter Tab** or the **Filter Group Tab**.

Assign Filters (Filter Tab)

1. The left section displays the **Available Filters** (created at the system level).
2. **Select** the filters you wish to apply to the campaign.
3. Click the **proceed icon** (arrow) to move the selected filters to the **Assigned Filters** section on the right.
4. Click **Apply** to save the changes and activate the filtration logic.
5. *Note:* You can **hover the mouse over** a filter's information icon to view its details before assigning it.

Assign Filter Groups (Filter Group Tab)

1. The page displays Filter Groups (both Campaign-level and System-level).
2. **Select** the Filter Groups you wish to apply.
3. Click the **proceed icon** to move the selected groups to the assigned list.
4. Click **Apply** to save and implement the Filter Group's dialing logic.

Check Impact (Filtration Results)

The Supervisor can verify the effect of the assigned filters/groups before the campaign runs:

1. Click the **"Check Impact"** button.
2. In the modal, the Supervisor can view the **Filtered Count** and **Dialable Count** across the leads in the campaign, reflecting the combined effect of the selected filters/groups.
3. Clicking **"Check Dialable Numbers"** updates the count based on the current configuration status (enabled/disabled filters).

14. CRM Integration

14.1. Third party CRM Integration with CC

Overview:

CRM Integration enables seamless connection between a contact center platform and third-party CRM, ERP, LMS, or core systems to provide a unified agent interface and improve customer journey management. This integration allows contact center agents to access customer data, handle interactions across multiple channels, and efficiently manage customer relationships and workflows.

Key Benefits:

- Enhanced agent efficiency through integrated customer data access.
- Omni-channel support providing seamless customer interaction experiences.
- Flexible integration approaches supporting various CRM architectures and requirements.

Functionality:

CRM Integration supports two main host system types: CRM as Host and Ameyo as Host.

1. **CRM as Host:** Ameyo provides voice capabilities embedded within the CRM via a prebuilt or custom toolbar. Agents work primarily on the CRM while using Ameyo for voice calls.

2. **Ameyo as Host:** The agent works within the Ameyo platform and accesses CRM data either through URL-based integration or Web Services-based integration. This approach supports omni-channel communication and richer agent functionalities.

Integration methods include:

- **Web-Toolbar Integration** for **CRM as Host**, embedding Ameyo's toolbar for voice calls. For example, Ameyo Integration with Salesforce, Microsoft Dynamics CRM, Freshdesk, Zendesk, etc
- **URL Based Integration** where CRM pages are displayed within Ameyo via iFrames with URL parameters.
- **Web Services Integration** using RESTful/SOAP APIs to fetch and update customer data on Ameyo's CTI with a custom mini-CRM.

Each method supports specific use cases based on CRM capability and integration needs.

Prerequisites:

- **Web-Toolbar Integration:** Requires a web-based CRM with support for iFrames and JavaScript events, and page refresh restrictions for WebRTC connections.
- **URL Based Integration:** Requires web-based CRM with cross-application iFrame support, acceptance of URL API parameters, and browser plug-ins like "Ignore X-frame."
- **Web Services Integration:** Requires CRM support for RESTful/SOAP APIs capable of two-way data communication.

Usage Instructions:

1. Identify the integration host model suitable for your CRM environment.
2. **For CRM as Host with Web-Toolbar:**
    - Embed Ameyo Toolbar iFrame into CRM.
    - Configure toolbar with agent call control features.
    - Ensure CRM meets JavaScript event and page refresh requirements.
3. **For Ameyo as Host with URL Based Integration:**
    - Configure Ameyo to invoke CRM URLs with relevant query parameters during agent login, call handling, and call disposition.

- Ensure CRM handles and responds to these URLs to display customer info.

4. **For Ameyo as Host with Web Services Integration:**
    - Implement API endpoints in the CRM for GET, POST, and PUSH operations.
    - Configure Ameyo mini-CRM to interact with these APIs.
    - Support both one-way (view only) or two-way (view and update) data exchange scenarios.

Summary

This documentation provides comprehensive guidance for users to understand, deploy, and operate the CRM integration feature within the Ameyo contact center platform, ensuring efficient interaction management aligned with customer journey objectives.

14.2. URL-Based CRM Integration with Ameyo

Overview

URL-based toolbar integration invokes CRM pages inside Ameyo's embedded browser at defined lifecycle events—login, connect, preview, and dispose—passing identifiers like session, campaign, call, and user extension as URL query parameters to maintain context across pages. The approach supports multiple disposition patterns (CRM-only, Ameyo-only, forced dispose, or dual) and recommends disposing in CRM before Ameyo to prevent premature tab closure and agent wrap delays. Session management can be unauthenticated, cookie-based, or Single Sign-On, with SSO attaching the CRM session token to all subsequent CRM URLs and issuing a logout on agent sign-out.

Key Benefits

- Seamless screen-pop across inbound, outbound, manual, preview, and callback flows by invoking CRM pages with call and agent context parameters, reducing context switching for agents.
- Flexible disposition handling with CRM-initiated dispose callbacks or Ameyo forced/dual dispose, ensuring agents are freed for the next call without waiting for wrap time when CRM notifies Ameyo.
- Streamlined session experience via cookie-based or Single Sign-On options, appending the CRM session token to all Customer/Preview/Dispose URLs and invoking CRM logout at agent sign-out.
- Simple, low-overhead integration using HTTPS GET query parameters for Knowledge Base, Customer, Preview, and Dispose URLs configured per campaign, avoiding heavy SDKs or custom adapters.
- End-to-end workflow control from the CRM using built-in APIs: Manual Dial, Dispose-and-Manual-Dial, and Voice Log download, enabling dialing, dispositioned redials, and recording retrieval within the CRM.
- Queue-aware CRM behavior using queueId and queueName to render different pages or processes per queue for more tailored agent guidance in inbound scenarios.
- Consistent traceability with identifiers like sessionId, campaignId, crtObjectId, userCrtObjectId, and customerId for linking CRM records to Ameyo call and recording

artifacts.

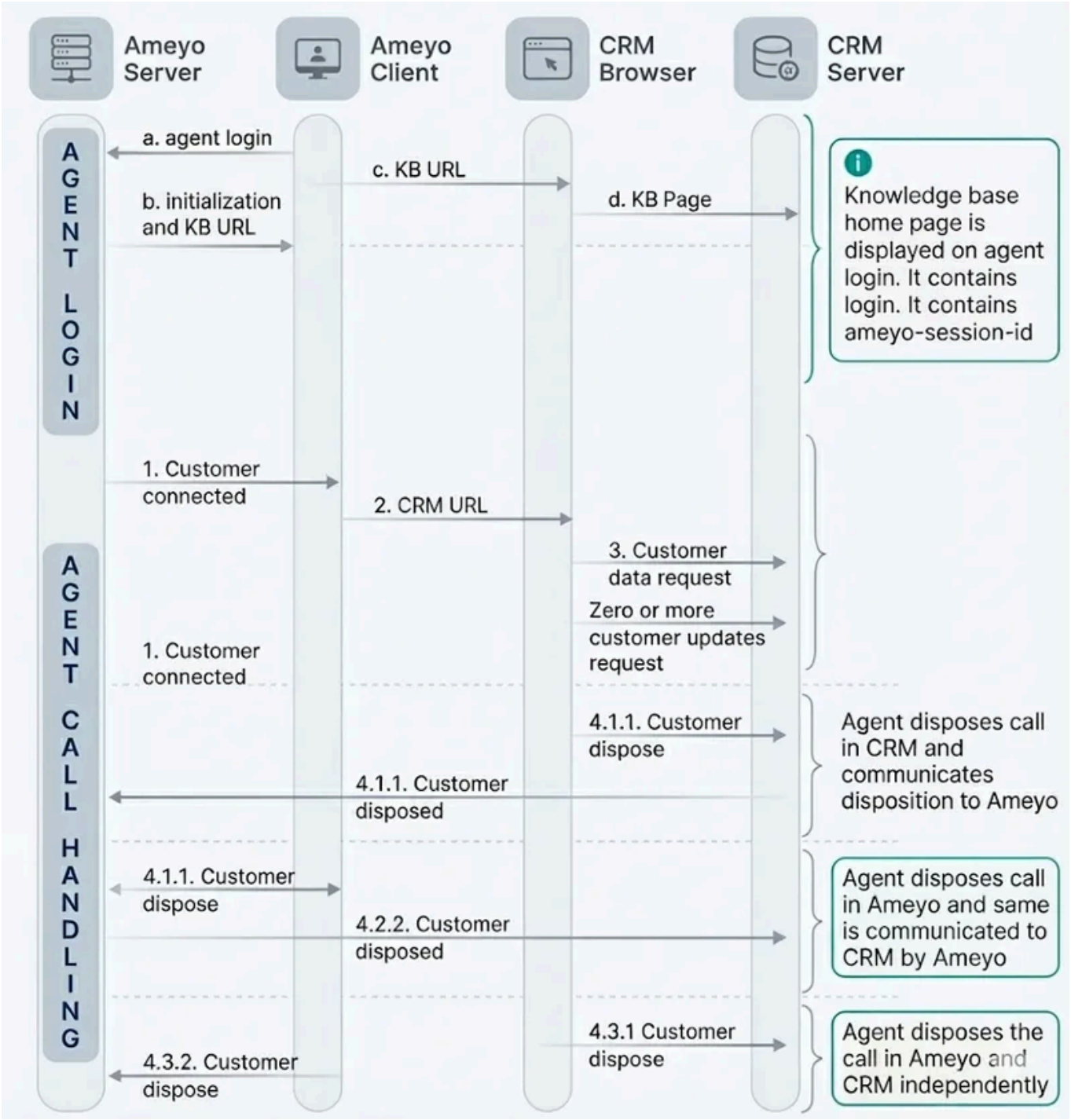
- Security alignment through HTTPS support and identity mapping where CRM user-id equals Ameyo user-id for SSO while Ameyo continues to authorize by Ameyo roles.
- Web-based third-party CRM integration via configurable URLs invoked at agent login, call connect, and disposition events.Manual Dial API to dial a specific number from CRM for a specific agent session and campaign.
- Dispose and Manual Dial API to dispose a call and immediately redial from CRM with the appropriate campaign disposition.
- Voice Logs API to download recordings for a call by Ameyo call identifier in wav or mp3 formats.
- Optional SSO with CRM-managed authentication and session propagation into Ameyo URL query parameters.

How it Works

- Ameyo Server handles agent activities and call context while emitting configured CRM and knowledge base URLs at defined lifecycle events.
- Ameyo Client hosts the agent user interface, including an embedded browser for Knowledge Base and CRM tabs that receive parameterized URLs from the server.
- CRM Browser renders third-party CRM pages and persists navigation while in call, driven by URL parameters including session and call identifiers.
- CRM Server provides customer data, accepts login/logout for SSO, and may receive dispose callbacks from Ameyo.

Integration Approach

- Agent Login: Ameyo sends a preconfigured Knowledge Base URL to the embedded browser for agent reference at login, optionally requiring authentication as per CRM design
- Agent Call Handling: URL-based screen-pop occurs for incoming, auto-dial, manual dial, preview, and callback scenarios with call identification and agent context parameters.
- Agent Call Disposition: Supported patterns include CRM-only, Ameyo-only, Forced Dispose from Ameyo (with CRM notification), or dual entry, with the recommendation to dispose in CRM before Ameyo to avoid CRM tab closure.



Agent UX overview

- The interface includes a telephony palette, a workbench with tabs, an embedded Knowledge Base, and an embedded CRM tab that is populated per call and may be read-only in preview flows based on configured URLs.
- When a call is disposed in Ameyo, the CRM tab can be closed by the client as the agent returns to Wait status for the next call, so CRM disposition and data save should occur first if using dual entry.

Core Communication Flows and Functions

URL formats

- **General**: <protocol>://<domain>/<port>?<key1>=<value1>&<key2>=<value2>... with protocol typically http or https; use https where possible for transport security.
- **Knowledge Base URL parameters**: userId and sessionId for identification and continued session parameter updates from Ameyo.
- **Customer URL parameters**: sessionId, campaignId, crtObjectId, userCrtObjectId, userId, customerId (outbound optional), phone, queueId, queueName as applicable.
- **Preview URL**: identical to Customer URL but triggered during preview to allow CRMs to render read-only views if desired.
- **Dispose URL parameters**: sessionId, campaignId, crtObjectId, userCrtObjectId, userId, customerId, disposition, and dispositionAttribute for callbacks where applicable.

Session management

- **No authentication**: CRM simply renders data on screen pop, not commonly used due to security constraints.
- **Cookie-based**: Authenticate at login (e.g., using Knowledge Base URL) and rely on browser cookies within the embedded browser across the session; ensure CRM logout before Ameyo logout to avoid stale sessions.
- **Single Sign-On**: Authenticate via CRM-provided HTTP API at Ameyo login to obtain crmSessionId and append it as query parameters on subsequent CRM/Knowledge Base URLs; send logout to CRM at Ameyo logout.

CRM URL configuration

- Admin configures CRM base URL per campaign as <Domain_Port>://<crm_server_ip>/<crmdirectory>/<crmpage> in Administrator settings.
- On call connect, Ameyo appends DACX parameters via GET to form <Domain_Address>://<crm_server_ip>/crmdirectory/crmpage?<key1>=<value1>&...; CRMs should read via GET.
    - Expected Params
        - sessionId
        - campaignId

- crtObjectId
- userCrtObjectId
- userId
- customerId
- phone

Disposition handling

- Ameyo expects a disposition indication to return the agent to Wait and enable the next call, which can be driven from CRM via a dispose callback URL or via Ameyo Force Dispose with prior CRM save.
- Disposition URL format: http://ameyo_server_ip:8888/ameyorestapi/disposeCallForUser with request data including campaignId, sessionId, crtObjectId, userCrtObjectId, customerId, phone, userId plus Disposition Code and optional Disposition Attr for callbacks.
- Disposition Attr examples include local-<date time>, customer-<date time>, after-<date time>, and selfCallback flags to control scheduling semantics and ownership.
- A sample shows callback scheduling with session identifiers and selfCallback=true; ensure the Disposition Code exists in the campaign's disposition plan.

```
curl --location 'https://demoprawin.ameyoemerge.in:8887/ameyorestapi/voice
--header 'Content-Type: application/json' \
--header 'Authorization: 12345abc' \
--data '{
"userId":"vaptuser1",
"dispositionCodeName":"sale",
"dispositionParams":{"isSelfCallback":"false", "callbackTime":"", "phone":
"requestId":"8989898989",
"notes":""
}'
```

Single Sign-On API

- Provide a single CRM API endpoint at http://<CRM_SERVER_IP>:<PORT>/<SOME_PATH>/login_logout accepting POST parameter request for both

login and logout commands.

- Login: Send command=login with userId and password; on success receive crmSessionId to be appended on subsequent CRM requests; failures return status=failed with message.
- Logout: Send command=logout with crmSessionId when the agent logs out of Ameyo; CRM should terminate the CRM session and return status.
- Notes: Authorization remains Ameyo-role based and Ameyo does not continuously validate CRM session freshness; CRM user-id should equal Ameyo user-id for role alignment.

Manual Dial API

- Purpose: Initiate an outbound call from CRM for a specific agent session within a campaign via Ameyo Web Access.
- Endpoint format: http://<ApplicationServerIP>:<Port>/ameyowebaccess/command/?command=clickToDialWithTokenAsync &data is passed in request body with content type application/json.
- Required parameters: campaignId, phone, and customerRecord when the campaign uses a custom table or primary key other than phone1.
- Response: JSON with result and reason, returning success or failed with an explanatory reason on error.
- Sample request: Token will be shared by support or Professional Services team

```
curl --location 'https://AmeyoServerDomain.ameyoe.in:8887/ameyowebaccess/c
--header 'hash-key: ameyoGeneratedToken' \
--header 'requesting-host: setup.ameyo.net' \
--header 'policy-name: token-based-authorization-policy' \
--header 'Content-Type: application/json' \
--data '{
  "userId": "agent",
  "campaignId": "1",
  "shouldAddCustomer": false,
  "phone": "9911337923",
  "additionalParams": {
    "recordId": "0015g00000Z04cfAAB"
  }
}'
```

- Sample success response:

```
json{ "result": "success", "reason": "success" }
```

Dispose and Manual Dial API

- Purpose: Dispose the current call in Ameyo and immediately redial from CRM with an appropriate disposition tied to the campaign.
- Endpoint format: http://<ApplicationServerIP>:<Port>ameyorestapi/voice/disposeAndManualDial & data is sent in request body.
- Required parameters: campaignId, userCRTObjectId, crtObjectId, customerId (for customer context), dispositionCode, and phone.
- Response: JSON with result and reason, with detailed error responses for missing disposition assignment, invalid crtObjectId, or invalid sessionId.
- Sample request and success response:

```
curl --location 'https://demoprawin.ameyoemerge.in:8887/ameyorestapi/voice/disposeAr
--header 'sessionId;' \
--header 'Content-Type: application/json' \
--header 'Cookie: __METADATA__=0ab6aca4-8f2d-4b85-98a9-9730aed1f6e8' \
--data '{
    "campaignContextId": 8,
    "userCRTObjectId": "d202-5b4d83c1-ses-agent-vmVUGgpB-1-uce-5",
    "crtObjectId": "d202-5b4d83c1-vce-5",
    "dispositionCode": "Sale",
    "phone": "465456",
    "customerId": "-1",
    "requestId": "dcf7eec5-0c8f-86c1-8d2f-c9f31db9ae8c"
}'
```

```
{ "result": "success", "reason": "success" }
```

- Sample failure responses: disposition not in plan, invalid crtObjectId, invalid sessionId with status and reason fields for diagnostics.

Voice Logs API

- Purpose: Download voice recordings by Ameyo call identifier in a specified format (wav default, mp3 supported) via HTTP commands.
- Command: downloadVoiceLog with JSON-encoded data including crtObjectId and optional targetFormat, passed via GET or POST request parameters.
- Request sample:

```
curl --location --globoff 'https://demoprawin.ameyoemerge.in:8887/ameyoweb
```

- Behavior: On success, the voice log download starts; failures return a JSON message indicating the recording could not be found.

Parameter reference

- sessionId: Unique Ameyo agent session identifier used across communications and URL query strings.
- campaignId: Identifier for the current campaign for routing and process identification.
- crtObjectId: Unique call identifier in Ameyo for linking voice logs and CRM records.
- userCrtObjectId: Identifier for the specific active agent voice extension when multiple are possible.
- userId: Unique Ameyo user identifier, also used to align SSO identities where CRM user-id should match.
- customerId: Unique customer record identifier in Ameyo for outbound and contact uploads when available.
- phone: Caller ID or dialed number provided to CRM and used in dispose and dialing commands.
- queueId/queueName: Inbound routing context to allow CRM page variation per queue.
- disposition/dispositionCode: Code configured in the campaign's disposition plan that must match exactly for successful dispose.
- dispositionAttribute: Attributes for callback scheduling such as local, customer, after, and selfCallback flags.
- crmSessionId: Session token issued by CRM on SSO login and appended to subsequent CRM URLs until logout.

Configuration and examples

- Configure CRM and Knowledge Base URLs in Administrator campaign settings and ensure CRMs read parameters via GET when the URL is thrown on call connect.
- Example screen-pop shows SugarCRM integrated with Ameyo via URL-based method using the embedded CRM browser.
- A complete sample Dispose URL illustrates callback scheduling and session scoping across user and call identifiers for traceability and workflow actions.

Operational notes

- If CRM handles disposition but does not notify Ameyo, the agent will not be freed until wrap timeout; ensure the CRM invokes Ameyo's dispose URL or rely on Ameyo Forced Dispose with prior CRM save.
- For cookie-based sessioning, authenticate early via Knowledge Base URL and advise agents to logout of CRM before logging out of Ameyo to avoid stale cookies in the embedded browser.
- For SSO, remember that Ameyo uses CRM API only for authentication and continues to authorize by Ameyo roles; Ameyo does not continuously validate CRM session freshness.

Sample JSON for SSO

- Login request and response structure with method = POST & content-type application/json

```
{"password":"agent","userId":"agent","command":"login"}
```

- Login request and response structure with method = POST & content-type application/x-www-form-urlencoded

```
request={"password":"admin","userId":"admin4","command":"login"}
```

- SSO API Response should be in below format with method = POST & content type application/json

```
{"status":"success","crmSessionId":"crm-sess-norah-123-
434343","message":"message"}
```

- Logout request and response structure: response includes command=logout with crmSessionId, and status indicates success or failure for CRM session termination. Method = POST

  Request

```
{
     "command": "logout",
     "crmSessionId": "crm-1234-hjsdch"
}
```

Response

```
{
    "status": "success/failed",
    "message": ""
}
```

Security considerations

- Use https for CRM and dispose endpoints when available since the URL format supports both http and https, and include only necessary identifiers in query strings to minimize exposure.
- Align identities across Ameyo and CRM for SSO by keeping the same user-id, and ensure CRM sessions are invalidated on Ameyo logout via the logout command to avoid orphaned sessions.

Testing checklist

- Validate Knowledge Base URL loads at agent login and, where applicable, establishes cookie or SSO-based sessions with CRM.
- Confirm Customer and Preview URLs carry correct session, campaign, call, and user extension identifiers and render expected CRM views, including read-only behavior for preview.
- Exercise all disposition modes and verify agent state returns to Wait upon CRM-initiated dispose with valid codes configured in the campaign's disposition plan.
- Execute Manual Dial, Dispose and Manual Dial, and Voice Logs APIs, asserting success responses and enumerated failure responses for invalid disposition, crtObjectId, and sessionId cases.

14.3. Generic Toolbar Integration

Overview

The **Generic Web Toolbar** is a dedicated, web-based telephony solution designed to achieve seamless Computer Telephony Integration (CTI) with a third-party, web-based Customer Relationship Management (CRM) application.

The toolbar acts as the agent's telephony palette, operating within an iframe embedded directly inside the third-party CRM's web page. Its purpose is to provide agents with essential telephony functions and display their real-time call and presence status without requiring them to switch between applications.

Note: This is a **licensable feature** and requires enablement and full deployment by **Professional Services and Support**.

Key Benefits

- Embedded telephony inside CRM for fewer context switches, faster handle time, and consistent agent experience across inbound, outbound, preview, and callbacks.
- Rich two-way interoperability: CRM can trigger dial/dispose, while the toolbar emits events for screen pops, status, transfer/conference, and lifecycle updates for synchronized UI and workflows.
- Flexible authentication and extensibility: password or CRM-backed SSO, auto-extension selection, custom showCrm handlers, and optional nodeflow customizations for callback and wrap-up behaviors.

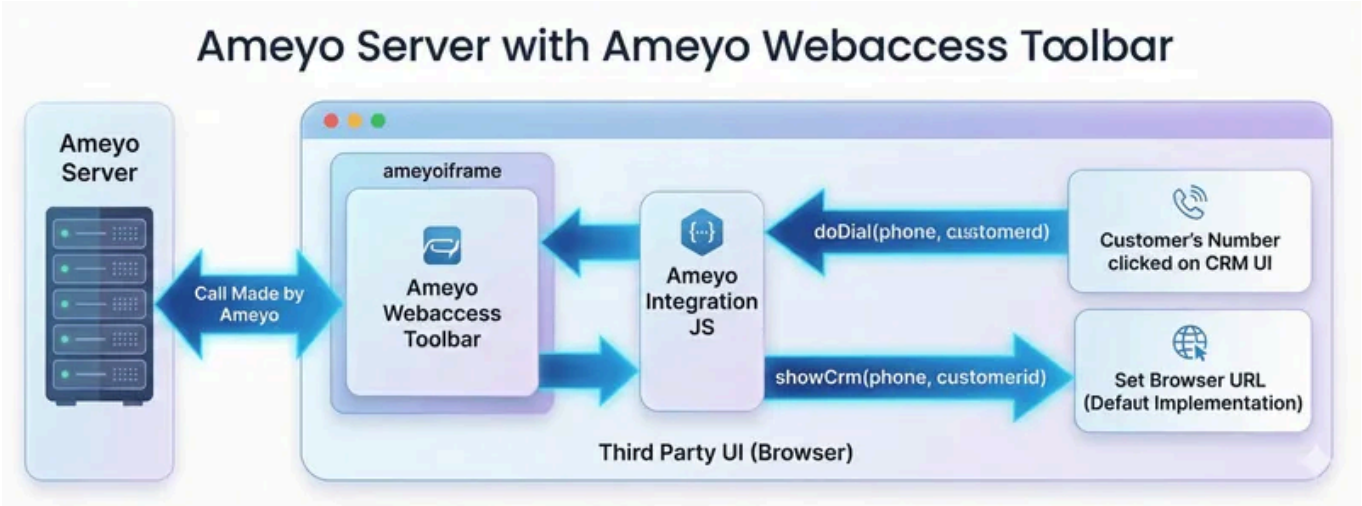
How It Works

The integration uses a two-way communication model via **JavaScript APIs** to link Ameyo's core contact center functionalities with the third-party CRM application.

Integration Approach

The third-party CRM is responsible for embedding the Ameyo toolbar into an iframe within its user interface. This process involves:

- **Glue Code:** Incorporating a specific JavaScript integration file as "glue code" in the headers of the CRM pages.
- **Container:** Defining a specific div element with the ID ameyoIframeDiv where the toolbar window will load.



Prerequisites

- CRM pages must support an iframe and include a container with id ameyoIframeDiv on each page where the toolbar appears, along with the Ameyo integration script in headers.
- Matching users must exist in CRM and Ameyo, with Ameyo agents provisioned prior to SSO or password login attempts to ensure successful authentication and campaign access.
- Agent browsers must reach the Ameyo host and ameyowebaccess endpoints, and the CRM must expose a POST /login_logout endpoint for SSO if CRM-backed authentication is required.

Core Communication Flows and Functions

Plan and prepare

- Confirm license entitlement, engage Professional Services, and identify CRM pages where the toolbar must appear to finalize scope and timelines.
- Verify the CRM supports iframes on those pages, and ensure agent browsers can reach the Ameyo host and ameyowebaccess endpoints over the required protocol and port.

- Provision matching users in Ameyo and CRM; userId must match if CRM SSO is required, and Ameyo users must exist before attempting login from the toolbar.

Add the integration script

- Include the Ameyo integration script on every CRM page that will host the toolbar: <Protocol>://<Domain_of_Ameyo_Application>:<Port_Number>/ameyowebaccess/toolbar/js/ameyo-integration-v<file_version>.js as a script tag in the page head to enable two-way messaging.

Create the iframe container and inject the toolbar

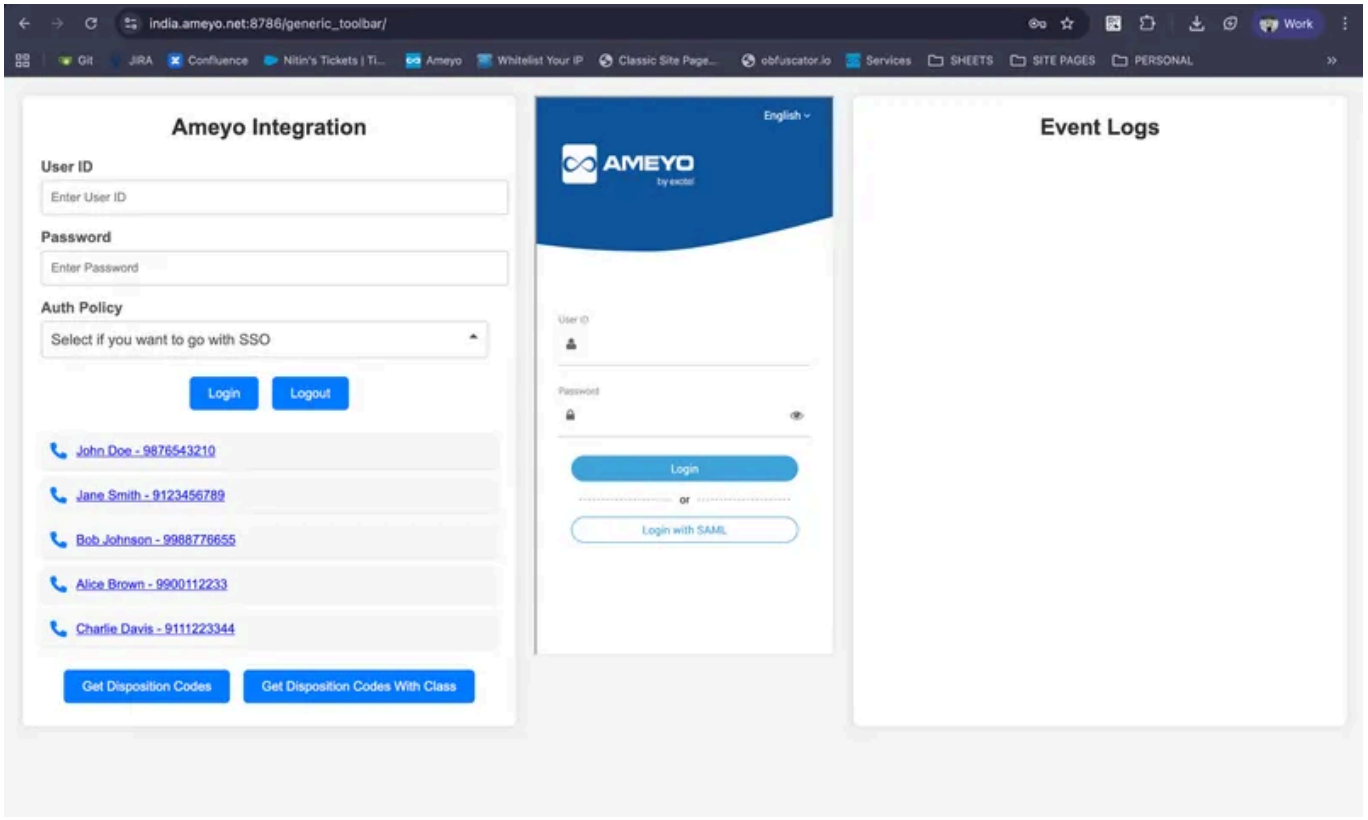
- Add a div with id ameyoIframeDiv to each CRM page and inject an iframe whose src points to <Protocol>://<Domain_of_Ameyo_Application>:<Port_Number>/ameyowebaccess/toolbar-crm.htm?origin=<crmOrigin>, where crmOrigin is computed from window.location to scope cross-window communication.
- Example snippet:

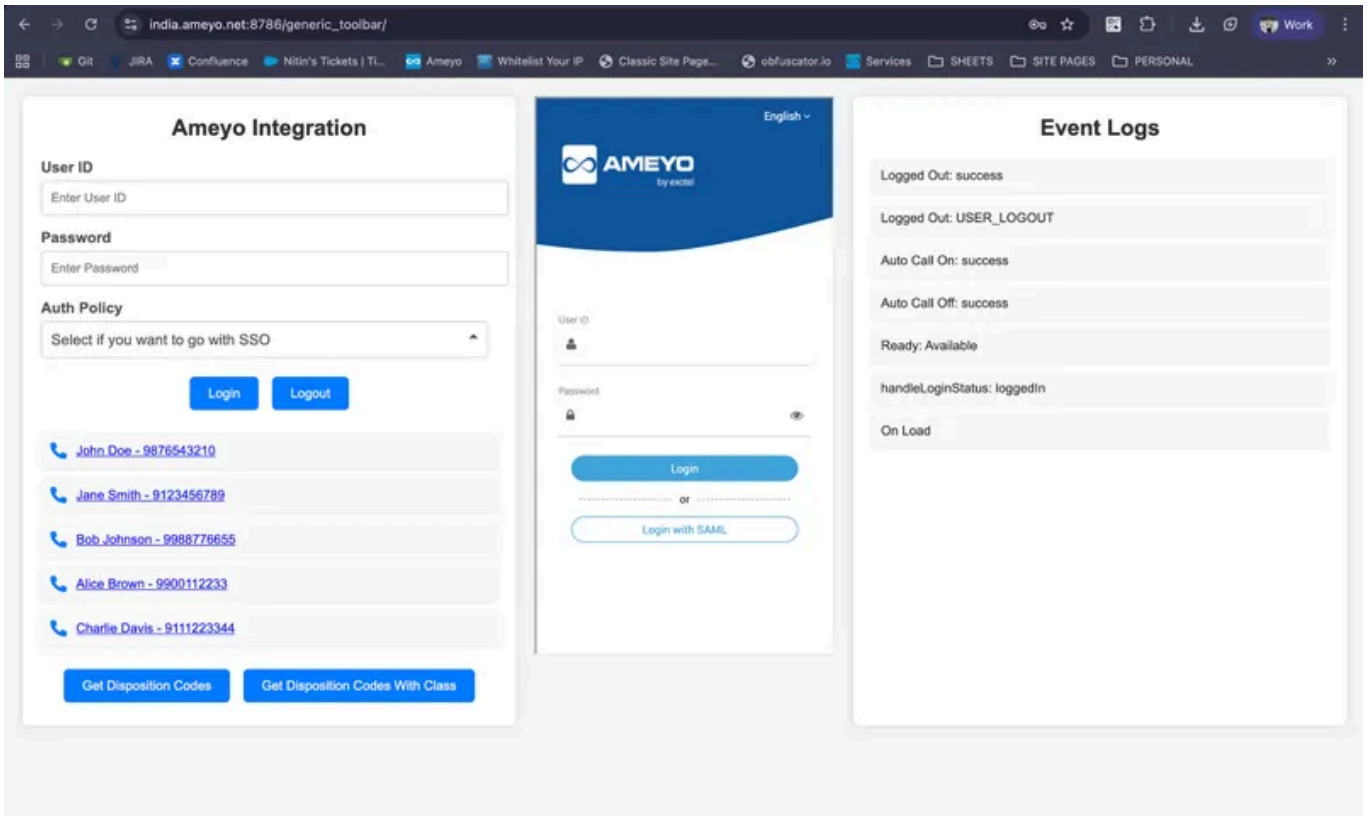
```
text<script>  var crmOrigin;
  var ameyoBaseUrl = "<Protocol>://<Domain_of_Ameyo_Application>:
<Port_Number>/";
  function initialise(){
    crmOrigin = window.location.href;
    var iframeDiv = document.getElementById("ameyoIframeDiv");
    var iframeUrl = ameyoBaseUrl + "ameyowebaccess/toolbar-crm.htm?origin=" +
crmOrigin;
    var iframeHtml = '<iframe height="400px" width="200px" id="ameyoIframe"
src="' + iframeUrl + '"></iframe>';
    iframeDiv.innerHTML = iframeHtml;
  }
</script>
```

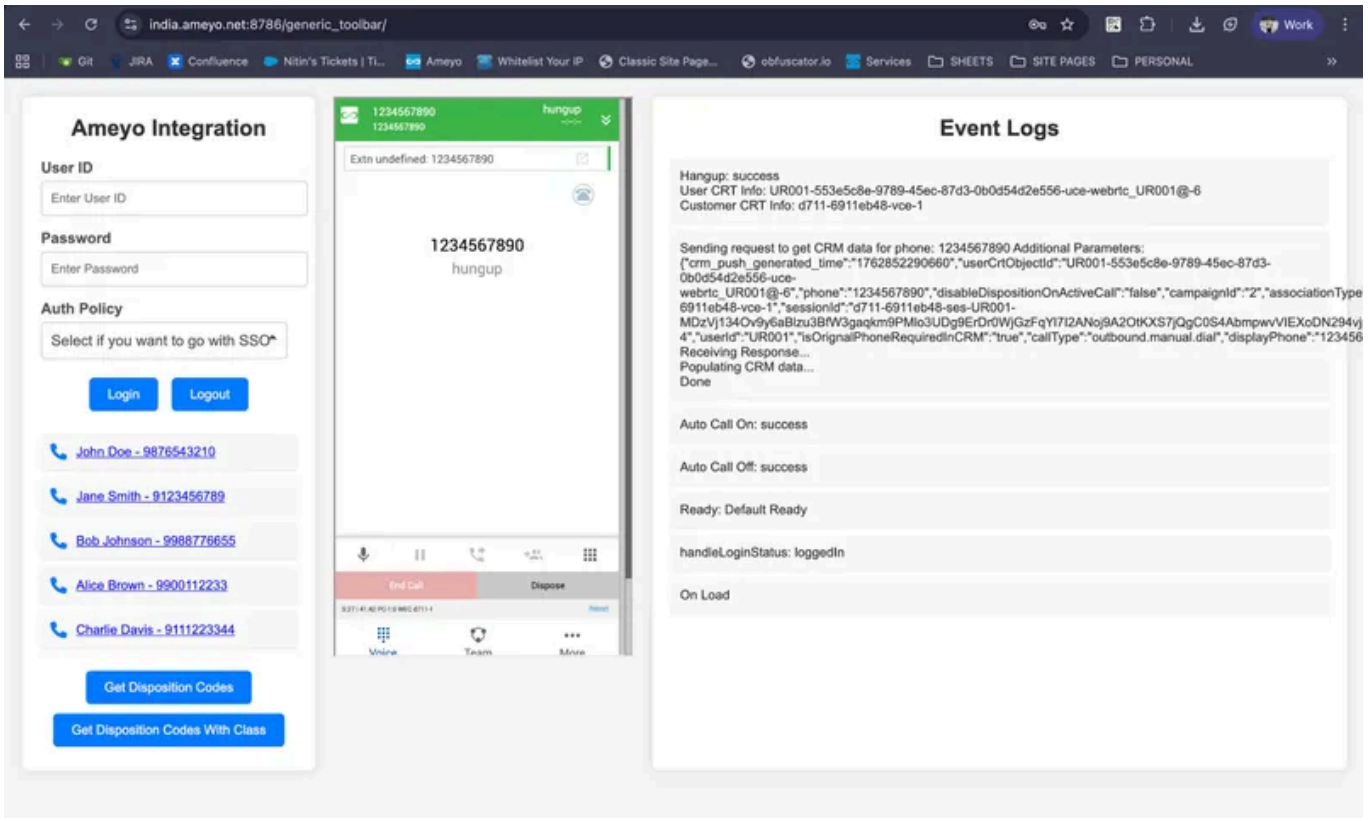
Initialize handlers and load lifecycle

- Use onLoadHandler to verify the page and iframe are ready, and listen for loginStatusHandler on each page open or refresh to reflect current session state in the CRM shell.
- If overriding screen pop, register your CRM function with ameyo.integration.registerCustomFunction("showCrm", { showCrm: fn }) to take control of navigation and complete the pop using

ameyo.integration.api.setRecordInfoForShowCrm(requestId, ...) after CRM context has loaded.







Choose and wire authentication

- For password login, call ameyo.integration.doLogin(username, password, 'auth.type.password'); for CRM SSO, call ameyo.integration.doLogin(username, password, 'auth.type.crm.http') to trigger the CRM authentication flow.
- Implement a POST /login_logout endpoint in the CRM that accepts requestXml and returns <status>, <message>, and <crmSessionId> on successful command=login, and that terminates the CRM session when Ameyo later calls command=logout.

Sample JSON for SSO

- Login request and response structure with method = POST & content-type application/json

```
{"password":"agent","userId":"agent","command":"login"}
```

- Login request and response structure with method = POST & content-type application/x-www-form-urlencoded

```
request={"password":"admin","userId":"admin4","command":"login"}
```

- SSO API Response should be in below format with method = POST & content type application/json

```
{"status":"success","crmSessionId":"crm-sess-norah-123-
434343","message":"message"}
```

- Logout request and response structure: response includes command=logout with crmSessionId, and status indicates success or failure for CRM session termination. Method = POST

Request

```
{
     "command": "logout",
     "crmSessionId": "crm-1234-hjsdch"
}
```

Response

```
{
    "status": "success/failed",
    "message": ""
}
```

Handle login state and force login

- React to loginHandler to display success, prompt for force login on session clash, or surface explicit failure reasons such as auth.policy.incorrect and username.or.password.empty for user guidance.
- When force login is required, call ameyo.integration.doForceLogin() from the CRM to take over the prior session and continue the initialization.

Auto-select the agent's extension

- Implement a global getExtensionInfo function that returns a JSON object { name: '<Extension_Name>', phone: '<endpoint>' } so the toolbar auto-binds the known device after login, and reflect the outcome via selectExtensionHandler in the CRM UI.
- Example:

```
function getExtensionInfo(){  return { name: 'SIP-1001', phone: '1001' };
}
```

Campaign selection and agent presence

- Allow agents to select the target campaign and reflect that via selectCampaignHandler, then toggle availability with readyHandler or breakHandler to keep CRM rosters and action controls in sync.
- For preview or auto-dial campaigns, also listen to autoCallOnHandler and autoCallOffHandler to display current dialing mode in the CRM header or status area.

Screen pop flow for inbound and outbound

- Define showCrm(phone, additionalParameters) in the CRM to navigate to customer/case context for inbound ACD, auto, manual, preview, callback, and click-to-dial scenarios, or override with registerCustomFunction to centralize the pop logic across pages.
- After rendering, call ameyo.integration.api.setRecordInfoForShowCrm(requestId, requestId, phone, callback) to acknowledge completion and keep the toolbar and CRM synchronized.
- Example pattern:

```
function customShowCrm(phone, params, requestId){  // Resolve record, route
CRM UI, then acknowledge:
  ameyo.integration.api.setRecordInfoForShowCrm(requestId, requestId, phone,
function(resp){ /* log */ });
}
ameyo.integration.registerCustomFunction("showCrm", { showCrm: customShowCrm
});
```

Click-to-dial from CRM records

- Initiate calls using ameyo.integration.doDial(phone, customerId, additionalParameters) from record pages to pass context for routing and analytics, or prefill the dial box with ameyo.integration.populateNumberInDialBox(phone) when agent confirmation is required.
- Example:

```
ameyo.integration.doDial('+14085551212', 'CUST-567', { leadSource: 'Web' });
```

Disposition and wrap-up

- Fetch two-level dispositions with ameyo.integration.getDispositionCodes(campaignId?) and render CRM dropdowns, then submit the agent's selection with ameyo.integration.disposeCallByDisposition(dispositionCode) and wait for handledisposeCallByDispositionCode to confirm completion.
- On errors like null crtObjectId or invalid codes, rely on handleFailedDispositionNotifyGeneric to display validation feedback and keep the form open for correction.

Dispose-and-dial

- Use ameyo.integration.disposeNDial(dispositionCode, phone) to end the current call and immediately dial the next number, noting that the default release disallows the "Callback" disposition in this path unless explicitly customized by Professional Services.
- Confirm both the disposition result and subsequent dial status via handledisposeCallByDispositionCode to decide whether to advance the CRM workflow or retry.

Transfers and conferences

- Log and visualize call routing by listening to transferToPhoneHandler, transferToAQHandler, transferToUserHandler, transferToIVRHandler, transferToCampaignHandler and the conference counterparts, updating the CRM timeline and participants accordingly.
- Use these events to annotate activity history, e.g., "Transfer.To.Agent.Queue.Request.Sent," and to keep ownership and queue metadata current on the CRM record.

Logout and session termination

- When CRM signs out the agent, call ameyo.integration.doLogout() to end the Ameyo session; when the toolbar logs out, Ameyo will call the CRM's /login_logout with command=logout, which the CRM must honor by terminating its session and cleaning up UI state.

- Display logoutHandler results and remove any cached call context or disposition UI remnants to prevent accidental reuse on the next login.

Error handling and diagnostics

- Surface explicit login errors from loginHandler, including auth.policy.incorrect and username.or.password.empty, and guide agents to retry or contact support, while handling invalid sessionId responses on logout gracefully.
- For SSO, display the <status>failed</status> and <message> returned by the CRM endpoint and avoid creating CRM sessions or proceeding to extension binding until a success is received.

Security and origin governance

- Always include origin=<crmOrigin> in the iframe URL and validate origin in custom message handlers to scope cross-window communication to trusted pages only.
- Pass crmSessionId returned by the CRM SSO login in subsequent CRM web requests where required by policy to preserve session integrity and auditability across interactions

Events and handlers

Name	Type	When it fires	Payload	Typical CRM use
onLoadHandler	Event	When the current page fully loads, possibly multiple times due to redirects	None	Initialize page state and verify toolbar iframe and messaging channel are ready
loginHandler	Handler	After a login attempt, including UI login, doLogin, or auto-relogin	Success status or force-login required; on failure: auth.policy.incorrect, username.or.password.empty, unknown.error.occurred.please.refresh.or.retry	Reflect login result in CRM header, prompt for force login if required, or display reason on failure
loginStatusHandler	Handler	On open/refresh to communicate current session state; emitted once per load	status	Show “Logged in/out” banner or auto-resume UI based on status
forceLoginHandler	Handler	When a session is created forcefully because the same user was already logged in	status: forceLoginRequired + responseText	Ask agent to confirm takeover and then invoke doForceLogin from CRM
logoutHandler	Handler	When the server deletes the session due to user logout, supervisor action, or timeout	OnSuccess: success; OnFailure: Invalid sessionId	End CRM session and redirect to login; clear cached call context
showCrm	Event	On inbound, auto, manual, preview, callback, and click-to-dial to	currentPhone, requested, additionalParameters (e.g., CRM URL or callId)	Open or focus the customer/case record and acknowledge via

Name	Type	When it fires	Payload	Typical CRM use
		drive CRM navigation		setRecordInfoForShowCrm
selectExtensionHandler	Handler	After an agent selects an extension	OnSuccess: success, userCustomerCRTInfo; OnException: responseText detail, userCustomerCRTInfo	Confirm device binding and show active endpoint in agent bar
modifyExtensionHandler	Handler	After an agent modifies the extension	OnSuccess: success, userCustomerCRTInfo; OnException: responseText detail, userCustomerCRTInfo	Update device label and re-validate reachability before next call
selectCampaignHandler	Handler	After an agent selects a campaign	campaignNameWithId	Switch CRM disposition set and list views to the selected campaign
autoCallOnHandler	Handler	When agent enables auto-dial	OnSuccess: success	Indicate predictive/progressive mode in CRM status area
autoCallOffHandler	Handler	When agent disables auto-dial	OnSuccess: success	Revert CRM status to manual dialing mode
readyHandler	Handler	When agent sets presence to ready	status: Available	Mark agent as available in CRM roster and enable click-to-dial controls
breakHandler	Handler	When agent sets a break state	status: Training, Snacks, Lunch, or Unavailable	Show break reason in CRM roster and disable outbound actions

Name	Type	When it fires	Payload	Typical CRM use
hangupHandler	Handler	When an agent ends a call	OnSuccess: success, userCustomerCRTInfo	Trigger wrap-up timer and show disposition form in CRM
transferToPhoneHandler	Handler	When an agent transfers to another phone	Transfer.To.Phone.Request.Sent, userCustomerCRTInfo	Append transfer event to interaction timeline and update call party list
transferInCallHandler	Handler	When an agent transfers to an in-call party	Transfer.To.Phone.Incall.Request.Sent, userCustomerCRTInfo	Log warm transfer intent and hold state transitions in CRM
transferToAQHandler	Handler	When an agent transfers to an Agent Queue	Transfer.To.Agent.Queue.Request.Sent, userCustomerCRTInfo	Record queue transfer and show downstream queue/campaign in activity log
transferToIVRHandler	Handler	When an agent transfers to IVR	Transfer.To.IVR.Request.Sent, userCustomerCRTInfo	Log IVR transfer and display self-service path if applicable
transferToUserHandler	Handler	When an agent transfers to another user	Transfer.To.User.Request.Sent, userCustomerCRTInfo	Show receiving user and update ownership on the CRM record
transferToCampaignHandler	Handler	When an agent transfers to a campaign	Transfer.To.Campaign.Request.Sent, userCustomerCRTInfo	Track campaign reassignment in the case history
conferWithPhone	Han	When an agent starts a	Confer.Phone.Request.Sent, userCustomerCRTInfo	Add conference participant and mark

Name	Type	When it fires	Payload	Typical CRM use
Handler	dler	conference with a phone		three-way call in UI
conferWithTPVHandler	Handler	When an agent starts a conference with TPV	Confer.With.TPV.Request.Sent, userCustomerCRTInfo	Note TPV involvement and flag compliance workflow in CRM
conferWithUserHandler	Handler	When an agent starts a conference with another user	Confer.With.User.Request.Sent, userCustomerCRTInfo	Add internal participant and show consult state
conferWithLocalIVRHandler	Handler	When an agent starts a conference with Local IVR	Confer.With.Local.Ivr.Request.Sent, userCustomerCRTInfo	Indicate IVR assist and capture prompt path if exposed
handleDispositionCodes	Handler	After requesting disposition codes	Array/list of disposition classes and codes	Populate CRM wrap-up dropdowns with two-level options
handledisposeCallByDispositionCode	Handler	After attempting to dispose a call or dispose-and-dial	status for disposition result and, for disposeNDial, subsequent dial status	Confirm save, close wrap-up modal, or show retry on failure
handleFailedDispositionNotifyGeneric	Handler	On disposition exceptions such as null crtObjectId or invalid code	reason string describing failure	Display validation error and keep wrap-up form open for correction

Prerequisites

- **Licensing:** This is a **licensable feature**.
- **Professional Services:** Requires enablement and deployment from **Professional Services and Support**.
- **CRM Compatibility:** The third-party CRM must be web-based and capable of embedding external content within an iframe.
- **User Mapping:** User IDs must be consistent between the Ameyo system and the CRM for Single Sign-On.

Use Cases

- **Unified Agent Experience:** Integrating the toolbar into the CRM for sales or support workflows to eliminate context switching.
- **Optimized Sales Dialing:** Utilizing the **Click-to-Dial** function directly from a lead list in the CRM.
- **Automated Customer Context:** Using the **Screen Pop** event to automatically display the customer's service ticket or history upon an incoming call.
- **Session Integrity:** Leveraging the **forceLoginHandler** and **logoutHandler** to ensure sessions are correctly terminated in both Ameyo and the CRM to prevent unauthorized access.

14.4. FreshDesk Toolbar Integration with Ameyo

Overview

This document explains how to integrate the Ameyo toolbar with the Freshdesk Customer Relationship Management (CRM) platform. This integration makes the Freshdesk CRM compatible with Ameyo's calling features, allowing agents to use all available calling functionalities directly within the Freshdesk interface. The process involves creating a Freshdesk account, uploading a custom Ameyo app, creating custom data fields, and configuring the database to link the two systems.

Key Benefits

- Centralized access to call controls and customer tickets within Freshdesk
- Automated call logging and ticket creation for inbound and outbound interactions
- Seamless synchronization between Ameyo call data and Freshdesk ticket information

Functionality

The integration embeds the Ameyo toolbar inside the Freshdesk dashboard, allowing agents to:

- Initiate and receive calls using the Ameyo telephony system directly from Freshdesk.
- Automatically log call details as tickets or notes in Freshdesk.
- Perform real-time caller identification and screen-pop of relevant contact or ticket records.
- Create unattached tickets if a record is not matched, using parameters defined in the configuration tables.
- Manage call dispositions through custom fields to log outcomes at one or two levels (disposition and sub-disposition).
- Enable server- or client-side dumping for call logs and recordings, controlled from admin settings.

Prerequisites

- A valid Freshdesk account with Admin access.
- A configured Ameyo contact center deployment.
- Freshdesk API key extracted from the user's profile.
- Proper configuration of Freshdesk domain and Ameyo toolbar domain within the integration settings.

14.4.1. Freshdesk CRM App creation and Installation Guide

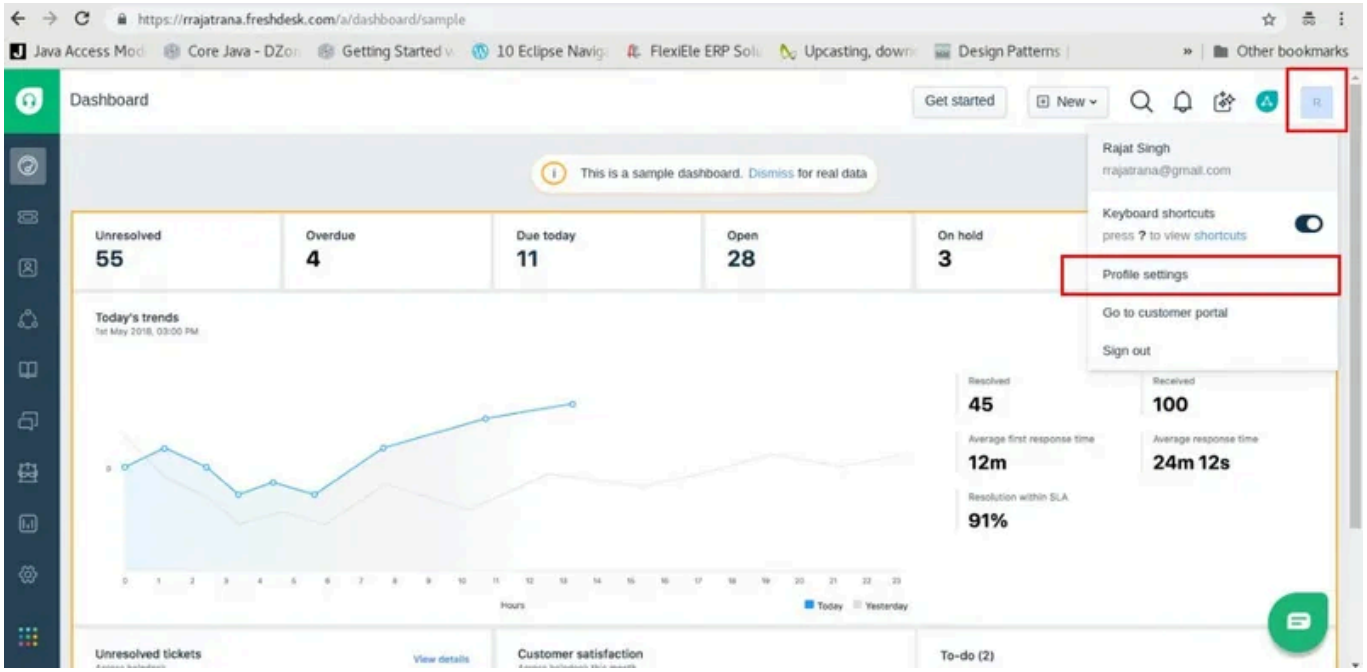
Overview

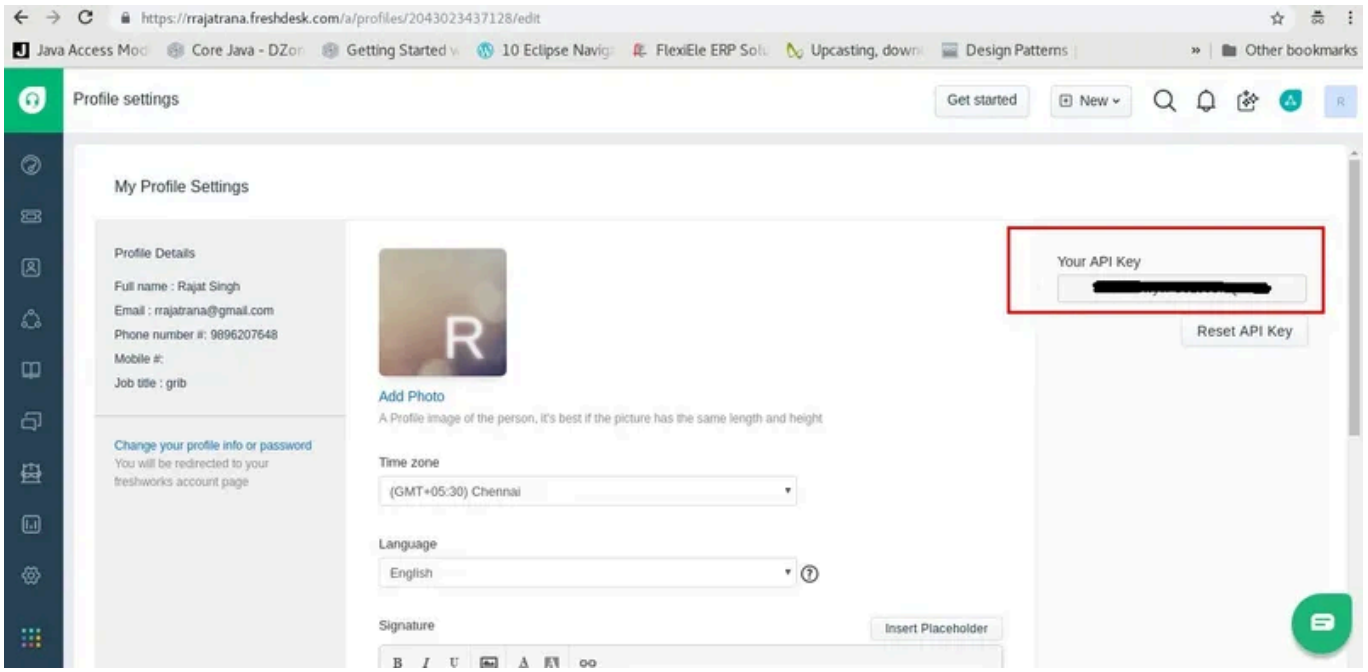
This document serves as a guide for the users to carry out the confguration (application for release 4.7 and above) at the Freshdesk CRM end. The step wise guide is as follows:

Usage Instructions

Step 1: Create Freshdesk Admin Account

1. **Sign Up:** Go to `https://freshdesk.com/signup`, provide the required details and sign up.
2. **Verify Account**: Check your email for a verification link to activate your account.
3. **Get API Key**: Navigate to your profile settings in Freshdesk and copy your API key. This key is required for the app configuration.



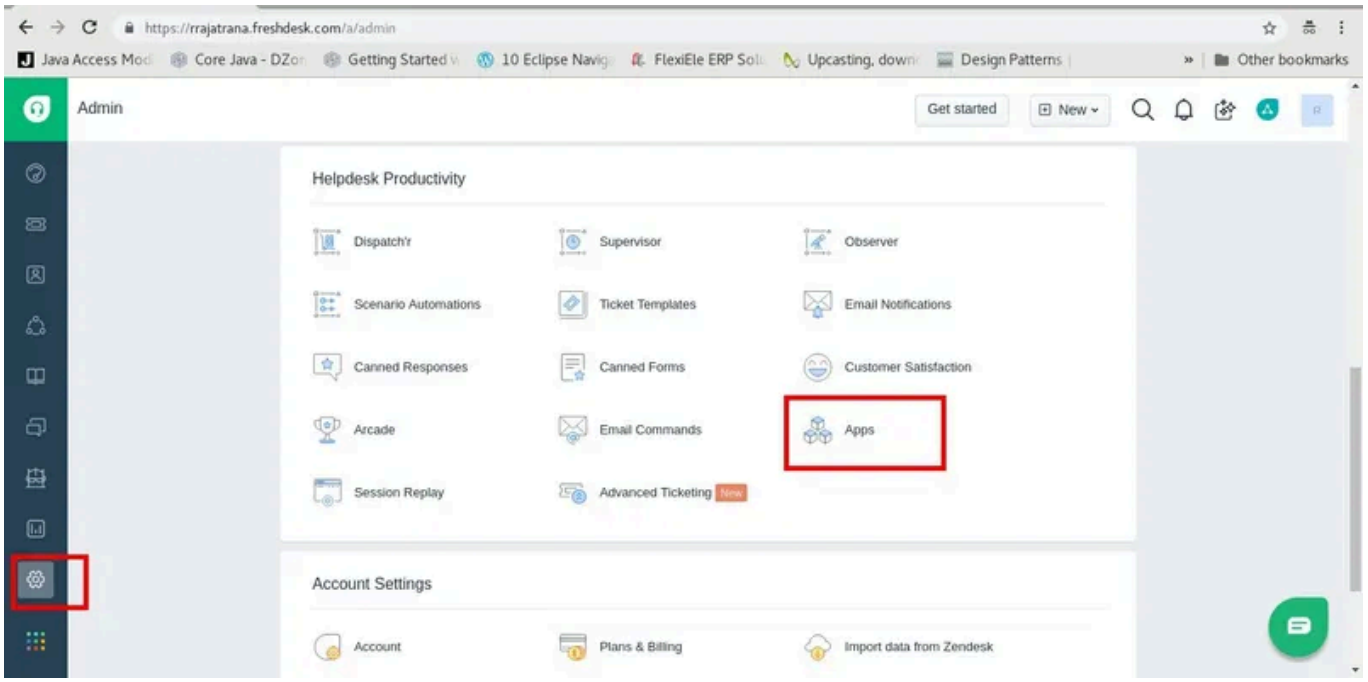


Step 2: Upload a custom app on Freshdesk

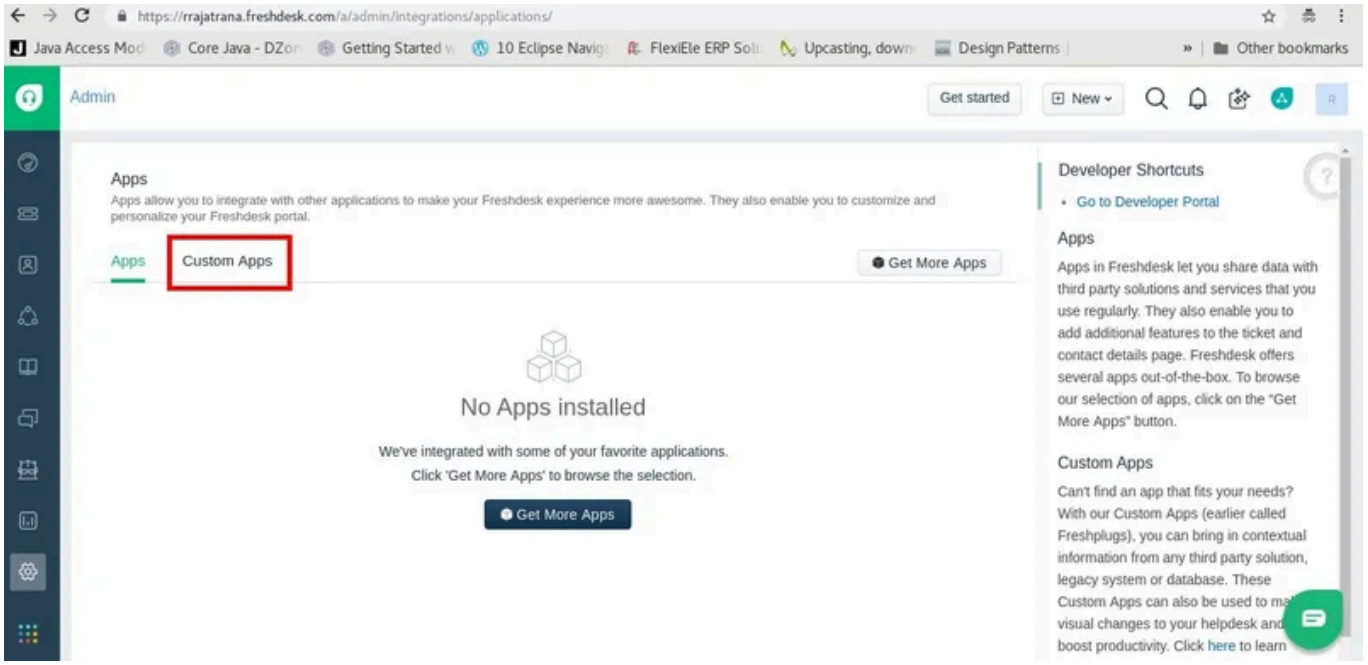
The integration is enabled by uploading a custom Ameyo application to your Freshdesk account.

Go to `https://(your freshdesk domain).freshdesk.com/a/integrations/applications/#custom_apps` or follow the following steps.

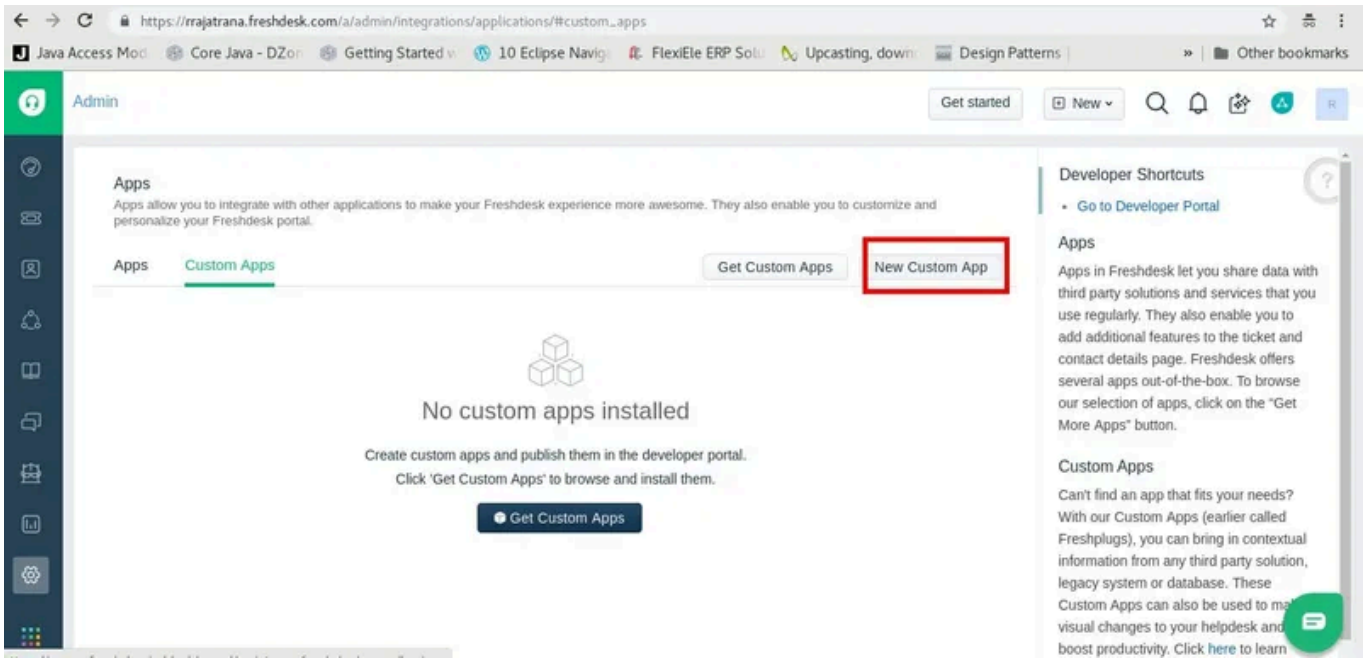
1. **Navigate to Apps**: In your Freshdesk account, go to **Settings** and select **Apps**.



2. **Go to Custom Apps**: Click on the **Custom Apps** tab.

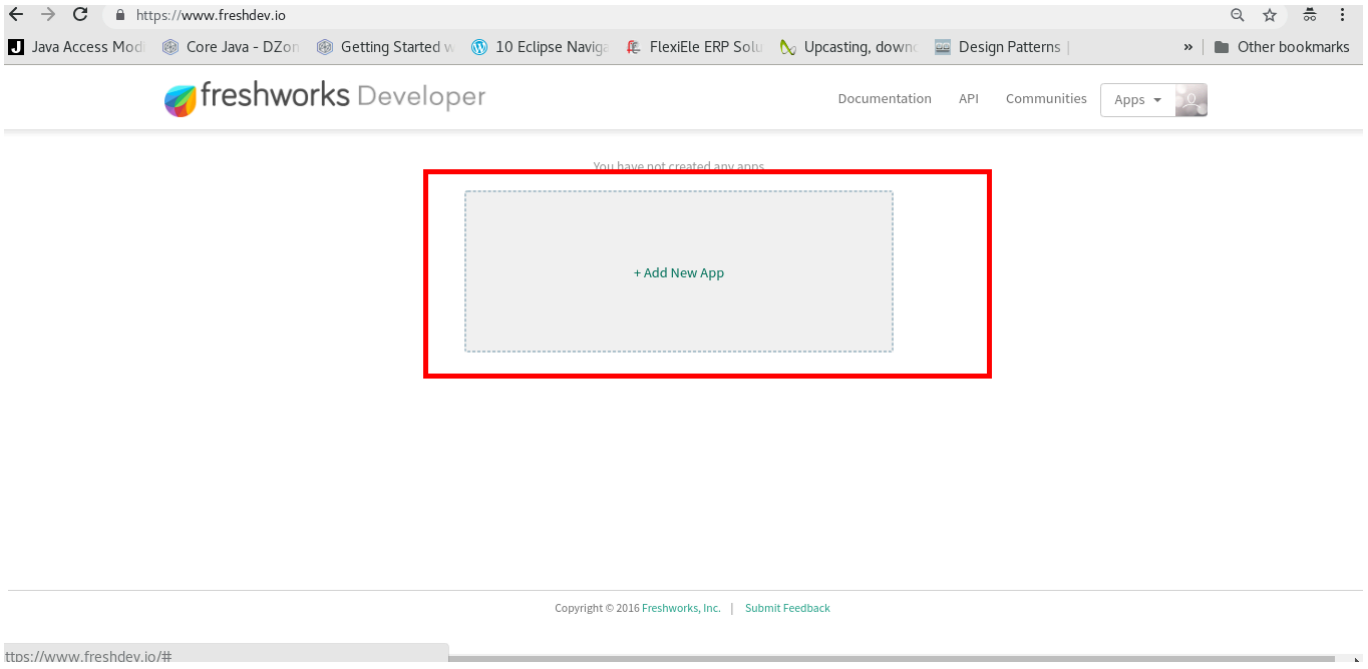


3. **Select the "New Custom App" option.**

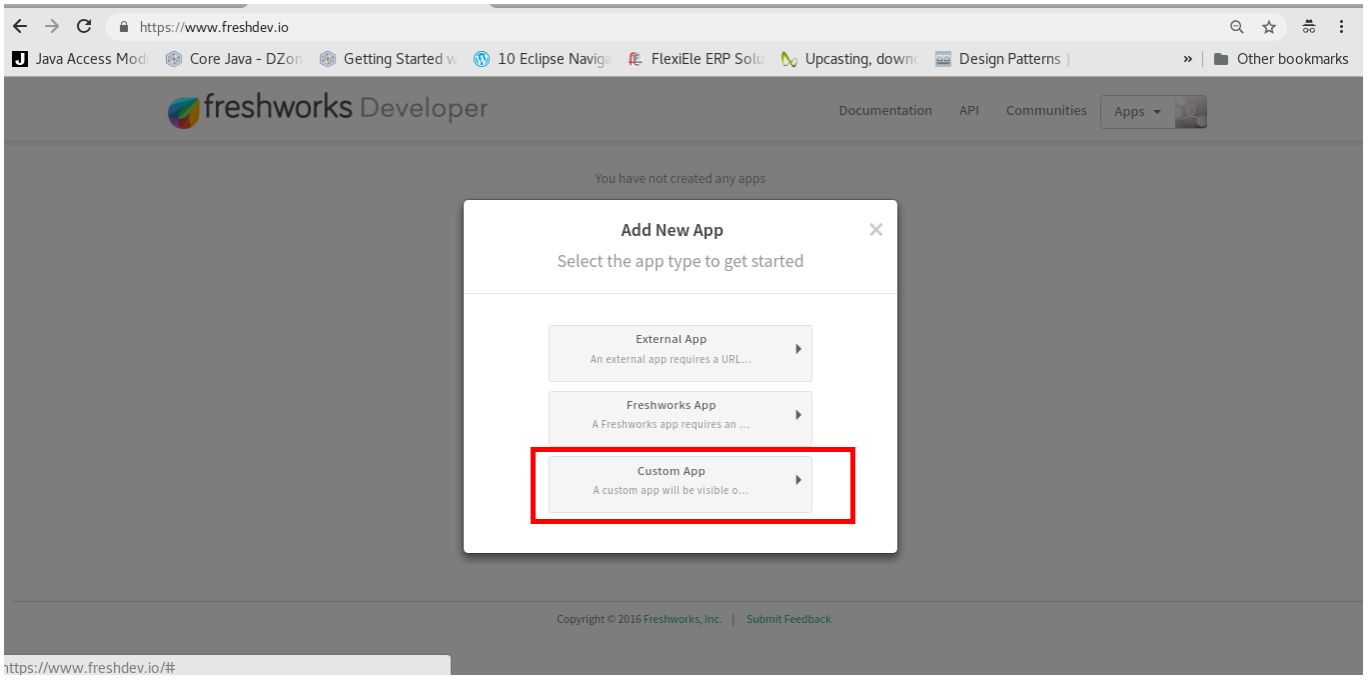


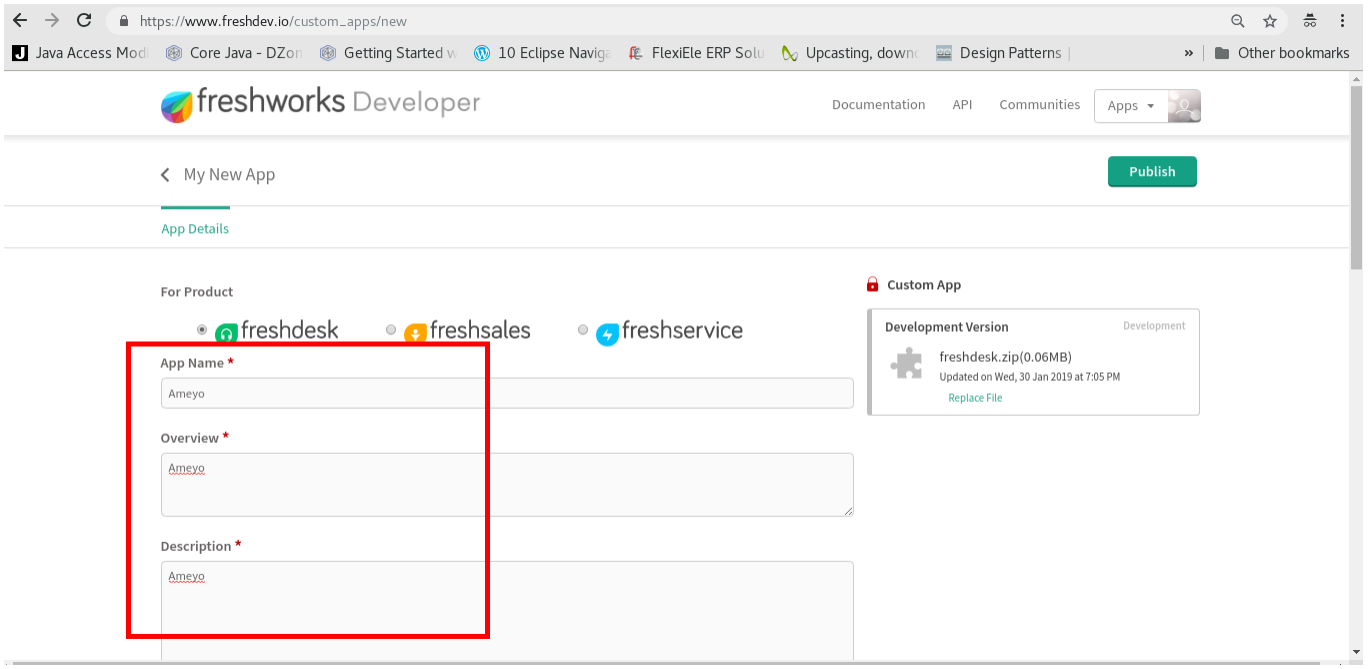
4. **Upload App:**

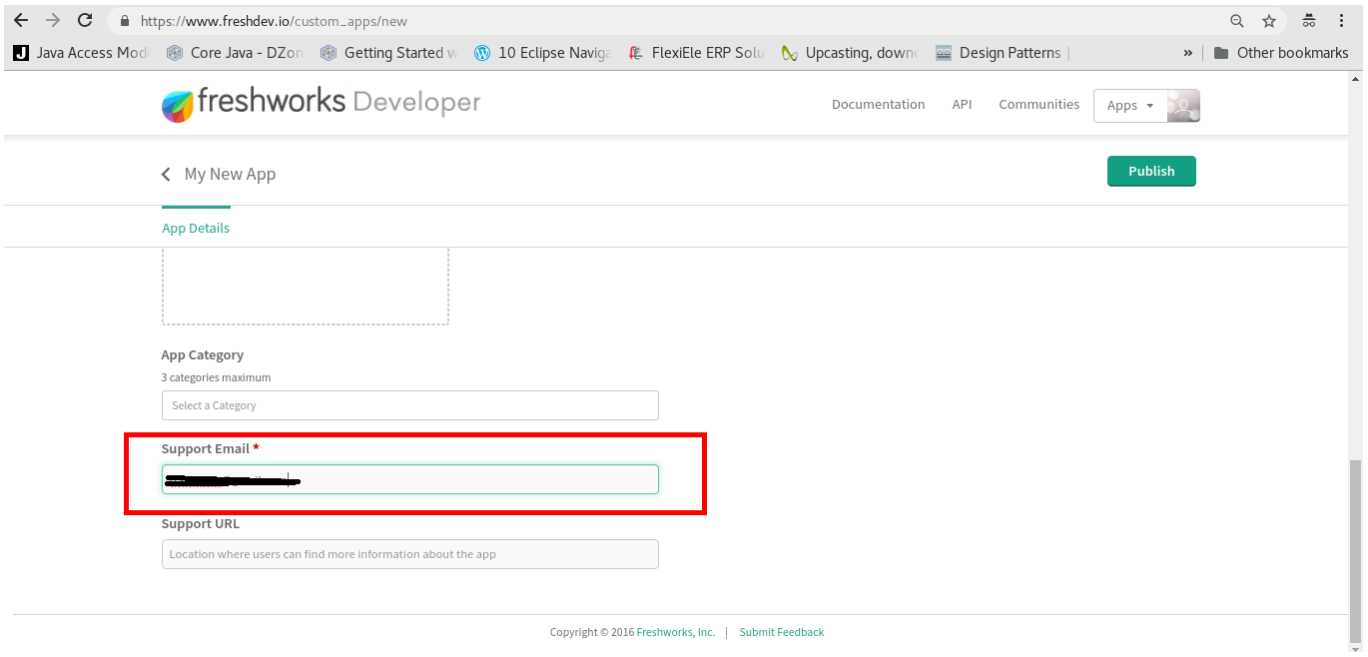
- Click the **New Custom App** button.
- You will be redirected to the Freshworks Developer portal. Here, select **+Add New App**.



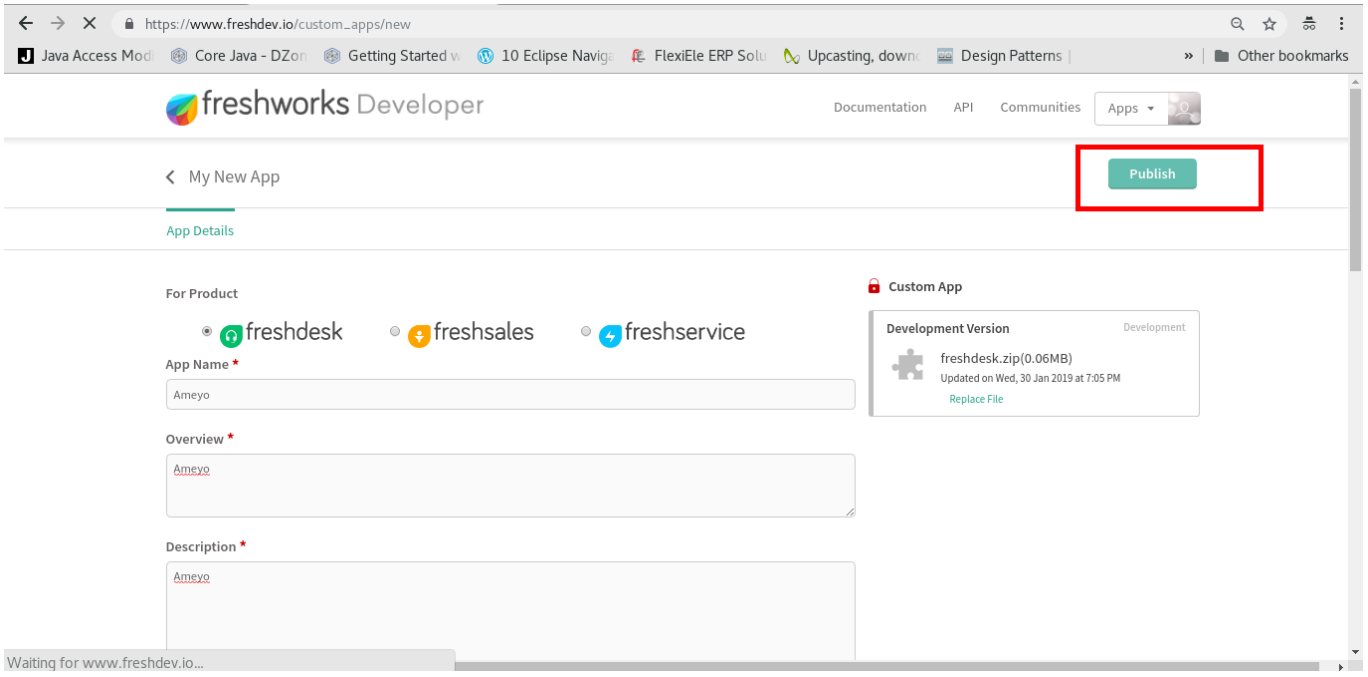
- Choose **Custom App**.
    - Upload the `freshdesk.zip` app file and fill in the required details, such as App Name and Support Email.


https://www.freshdev.io
Java Access Mod
Core Java - DZon
Getting Started w
10 Eclipse Naviga
FlexiEle ERP Solu
Upcasting, downc
Design Patterns
Other bookmarks
freshworks Developer
Documentation
API
Communities
Apps
You have not created any apps
Add New App
Select the app type to get started
External App
An external app requires a URL...
Freshworks App
A Freshworks app requires an ...
Custom App
A custom app will be visible o...
Copyright © 2016 Freshworks, Inc.
Submit Feedback
https://www.freshdev.io/#

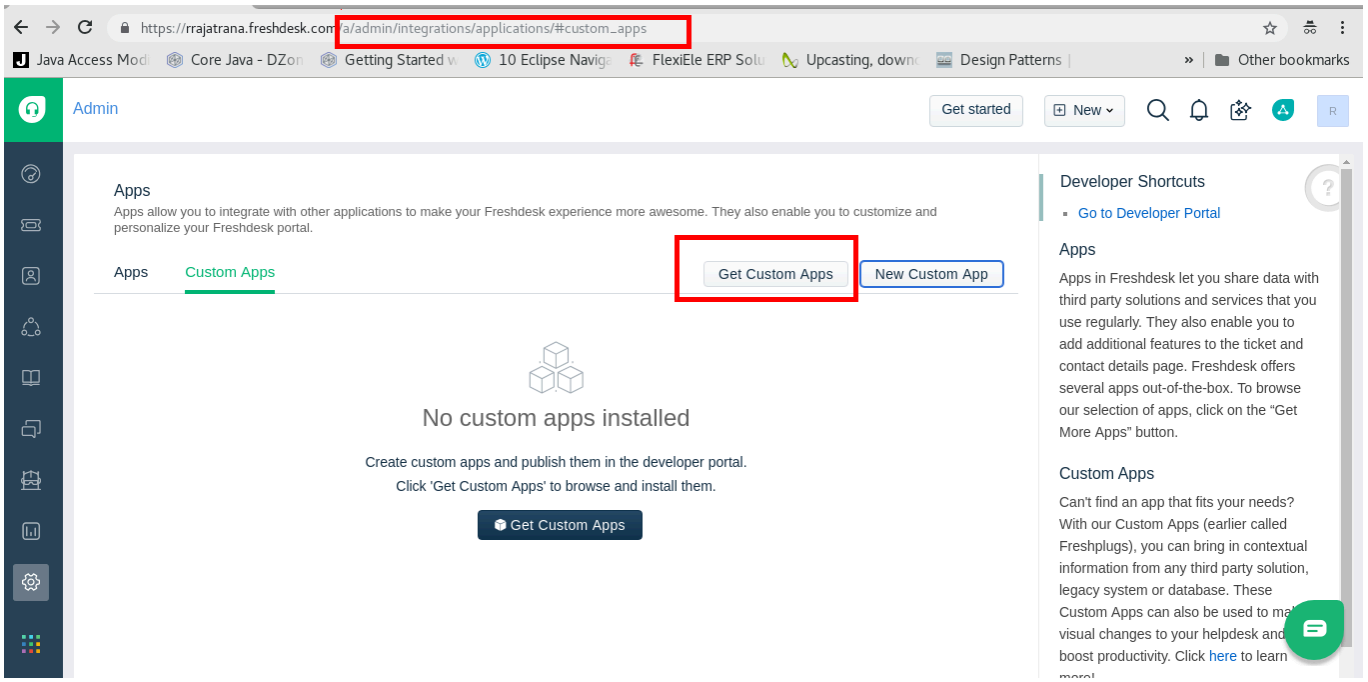

https://www.freshdev.io/custom_apps/new
Java Access Mod
Core Java - DZon
Getting Started w
10 Eclipse Naviga
FlexiEle ERP Solu
Upcasting, downc
Design Patterns
Other bookmarks
freshworks Developer
Documentation
API
Communities
Apps
My New App
Publish
App Details
For Product
freshdesk
freshsales
freshservice
App Name *
Ameyo
Overview *
Ameyo
Description *
Ameyo
Custom App
Development Version
Development
freshdesk.zip(0.06MB)
Updated on Wed, 30 Jan 2019 at 7:05 PM
Replace File



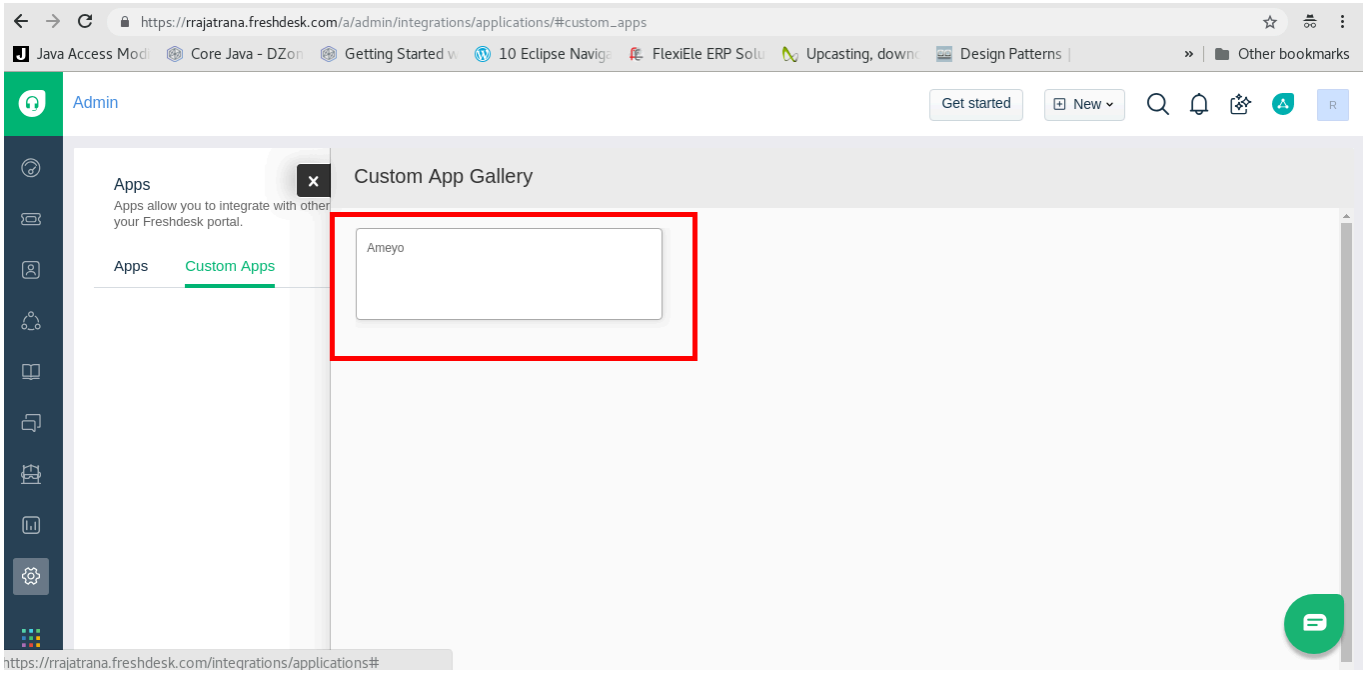
5. **Publish and Install**:
    - After uploading, select **Publish**.



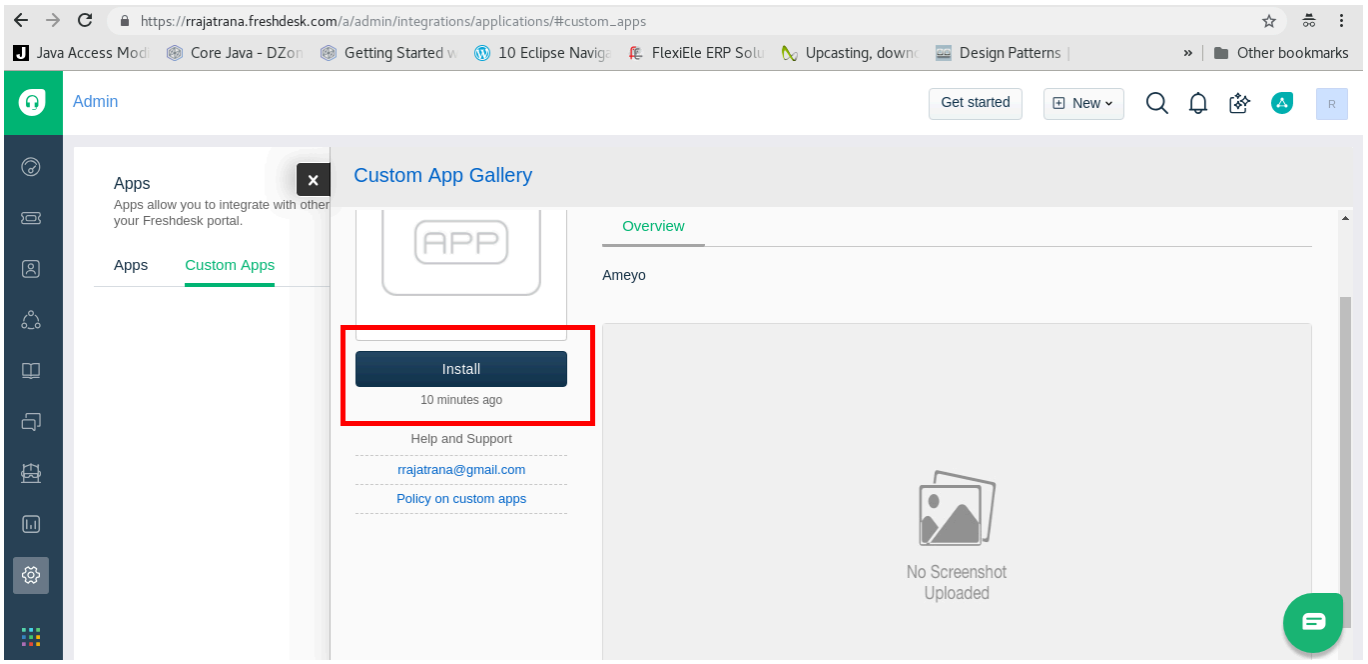
- The app gets published after 5 to 10 minutes. Once published, you can find the app on the .customapp page of freshdesk or go to `https://(your freshdesk domain).freshdesk.com/a/integrations/applications/#custom_apps`



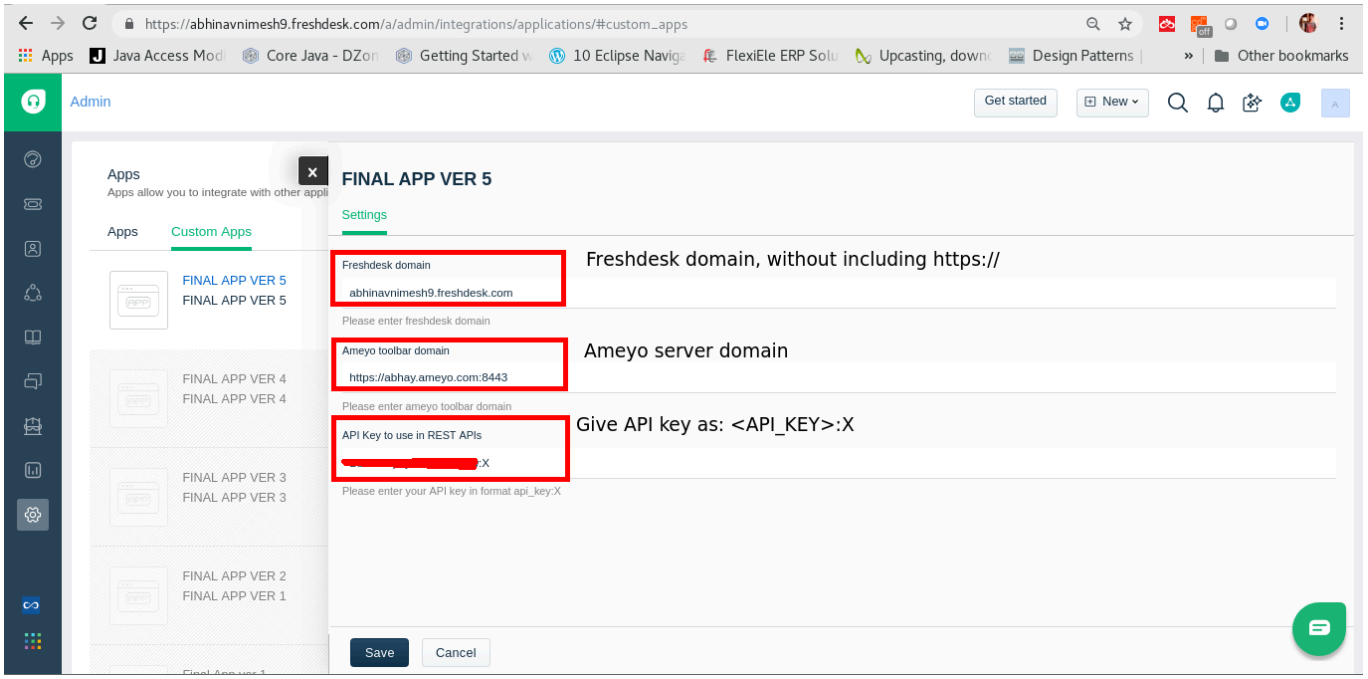
- Return to the **Custom Apps** page in Freshdesk and click **Get Custom Apps**.
- Find your newly published Ameyo app and click **Install**.



- **Click on the "Install" button.**

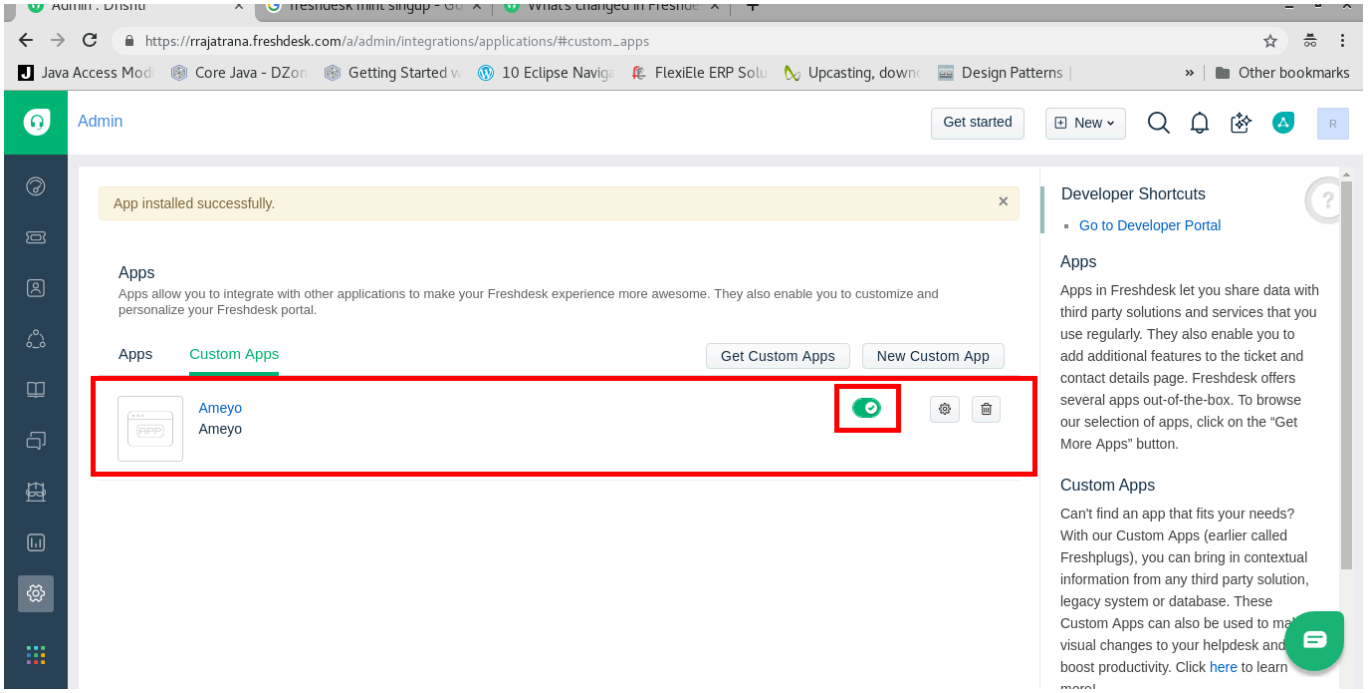


6. **Configure the App**:
   - During installation, you will be prompted to enter the **Ameyo server domain** (e.g., `https://mycompany.ameyo.com:8443`).
   - Enter your Freshdesk **API key** in the format `<API_KEY>:X`
   - Provide your Freshdesk domain without `https://`
   - Click **Save**.

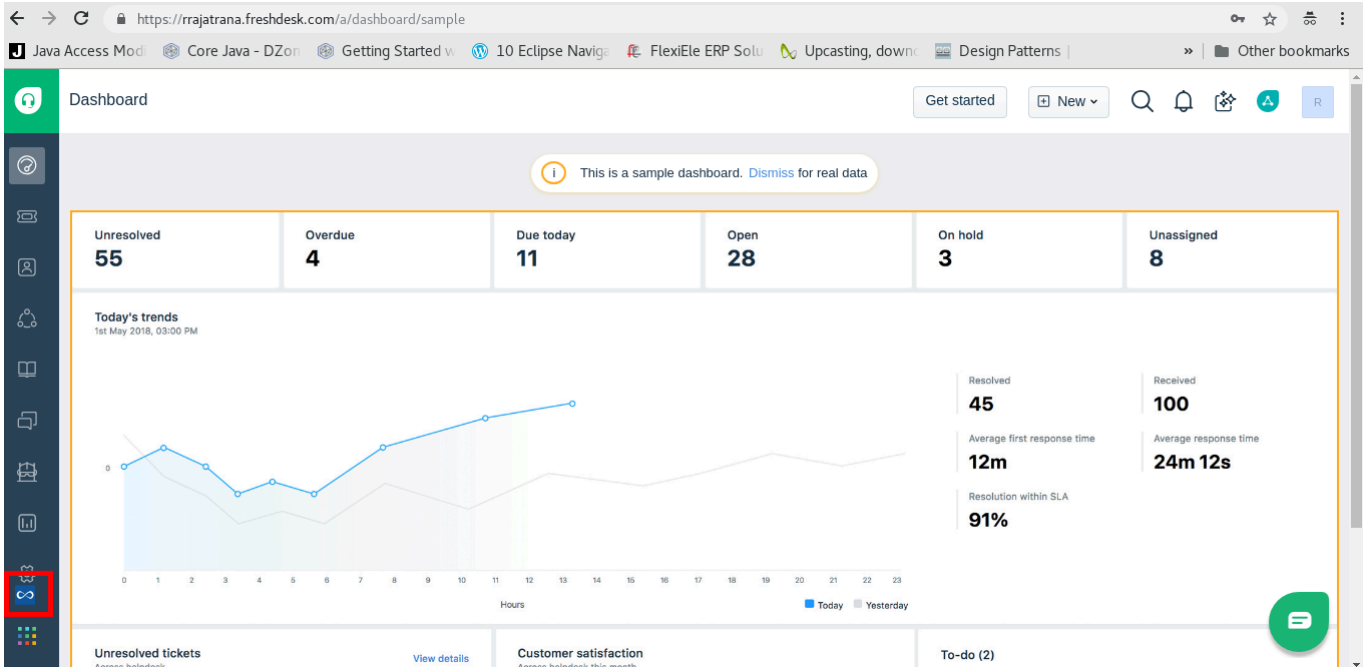


7. **Verify Installation**: Reload your browser. The Ameyo toolbar icon will appear on the left-side panel of your Freshdesk dashboard. Clicking this icon opens the Ameyo login toolbar.

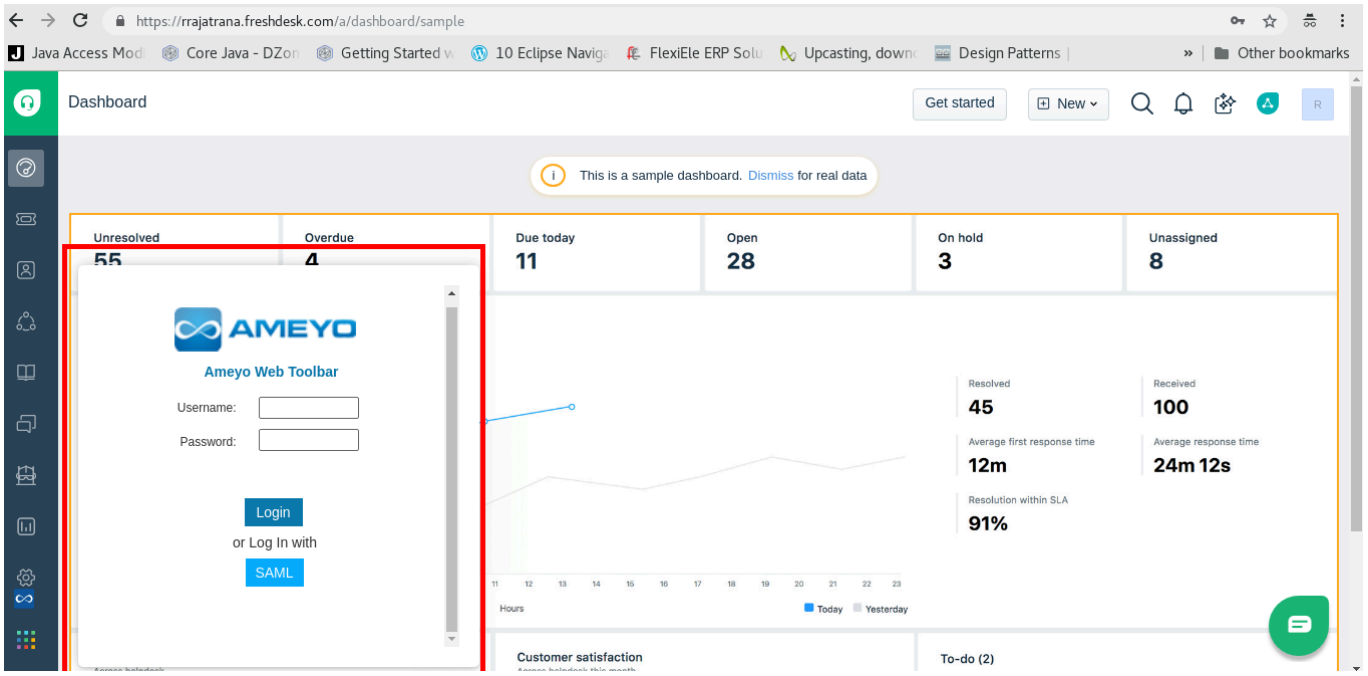
- Now, your app is listed. The green toggle button shows that the app is enabled.



- Reload your browser tab. Ameyo toolbar icon is displayed on the left-side panel on the Freshdesk dashboard.



- Click on the logo to open the Ameyo toolbar.



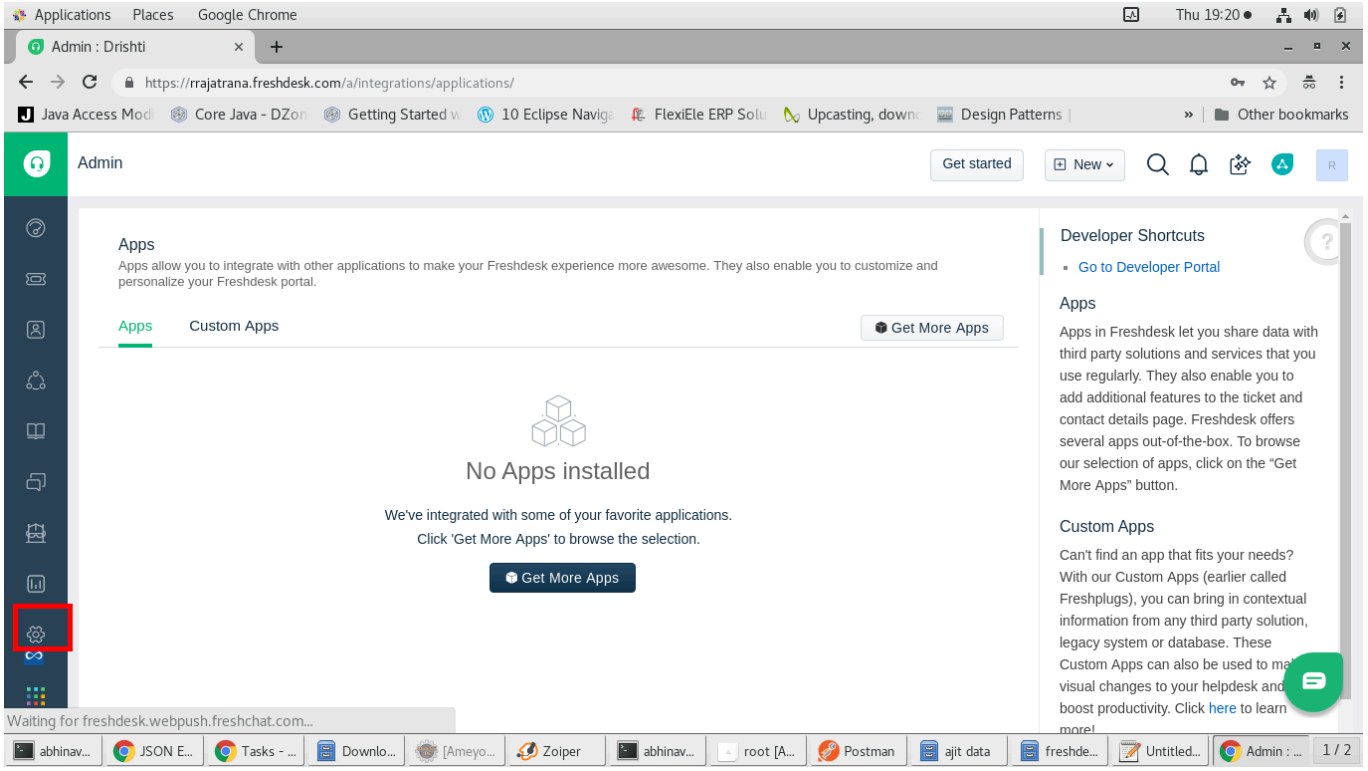
Step 3: Create custom field on Freshdesk

To properly log call outcomes, you must create custom fields in Freshdesk to store disposition data from Ameyo.

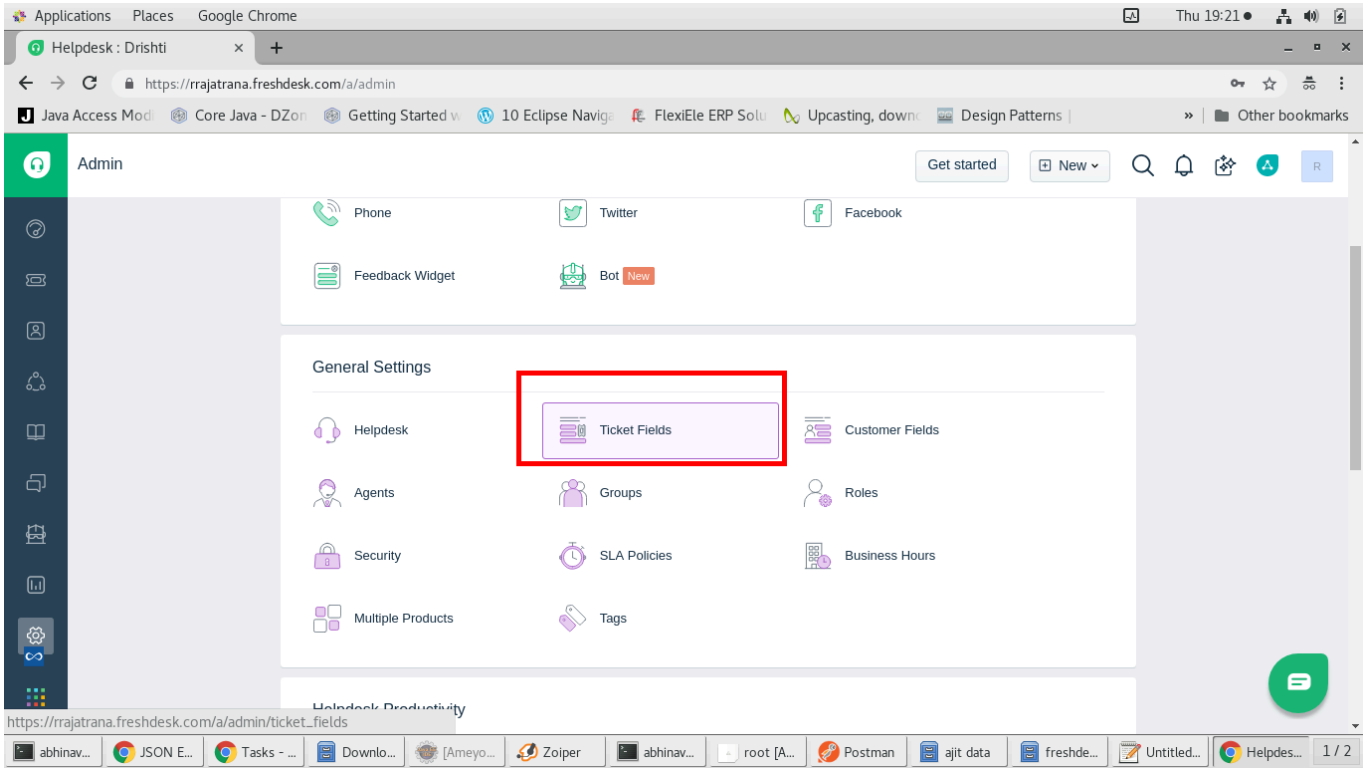
- **Navigate to Ticket Fields**: Go to **Settings** and select **Ticket Fields**.
- **Create Text Fields**: Add new single-line text fields to your ticket form.
- **Recommended Setup**:
    - For a **two-level disposition** structure, create two fields with the labels **Disposition** and **Sub-Disposition**.
    - For a **single-level disposition**, create one field labeled **Sub-Disposition**.

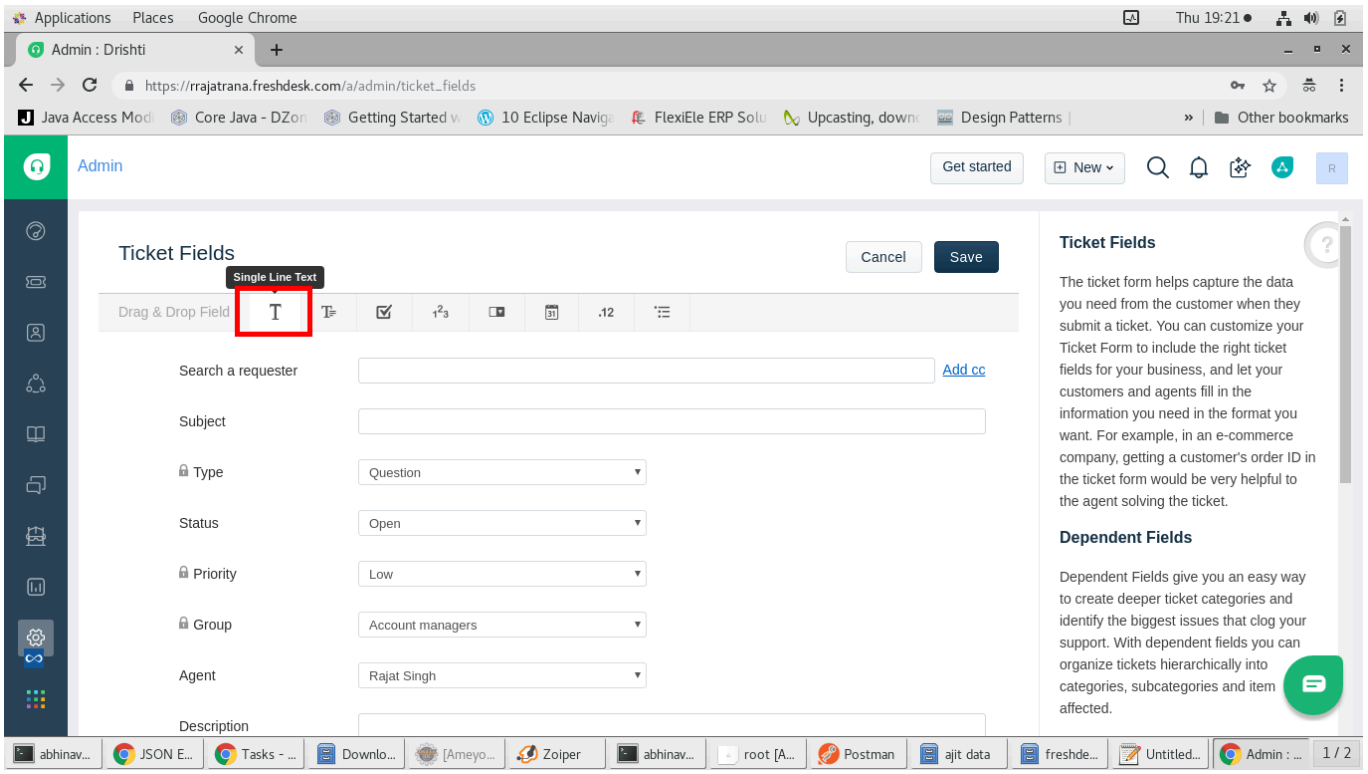
Step wise guide is provided below:

1. **Go to settings.**

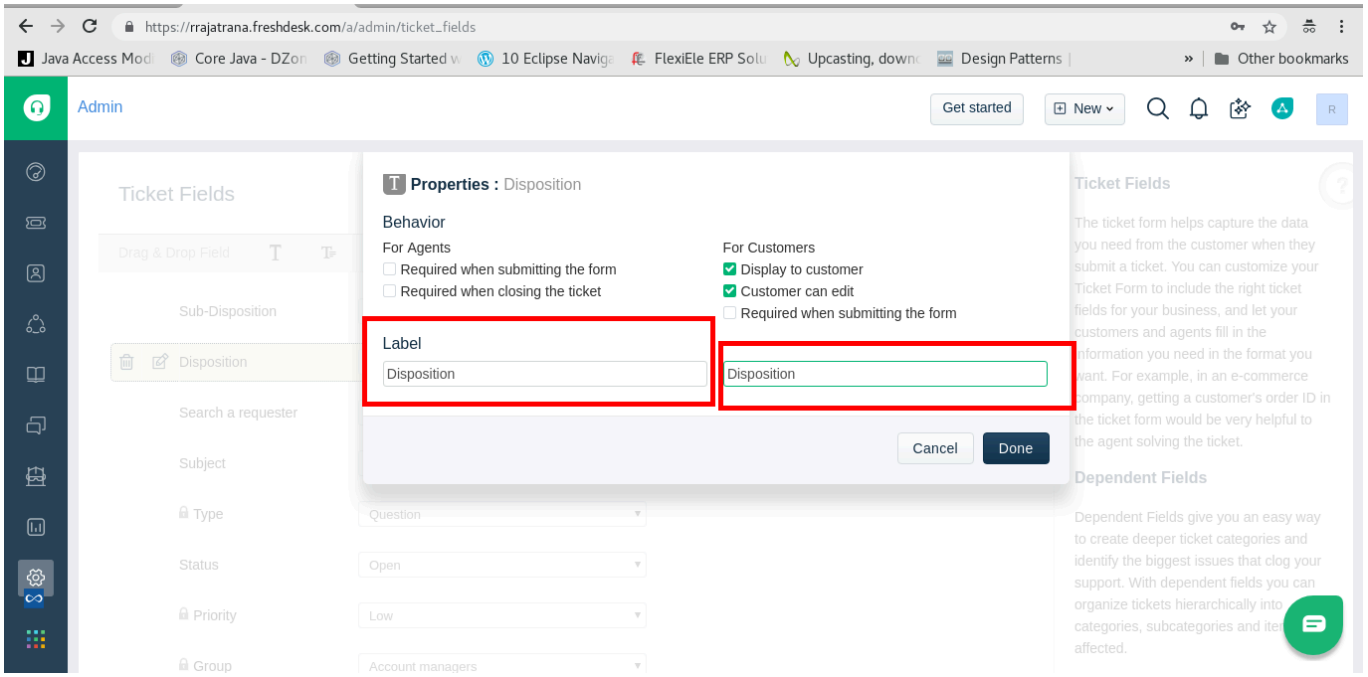


2. Go to Ticket Fields.

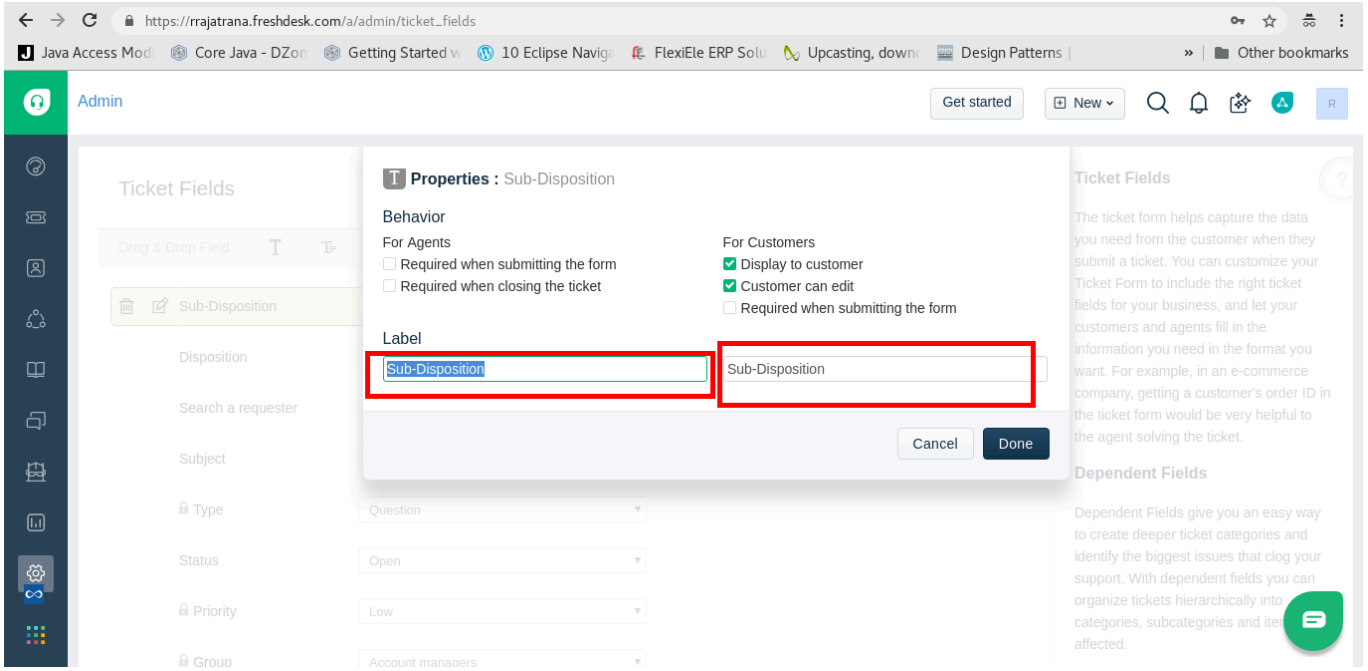




3. **As shown below, dispositions and sub-dispositions are created as simple text boxes.**



4. **Click on "Done".**



5. **Below is the recommended way of creating custom fields.**
    - For two-level disposition
        - Disposition
            - Label: Disposition
        - Sub Disposition
            - Label: Sub-Disposition
    - For one-level disposition
        - Sub Disposition
            - Label: Sub-Disposition

> After executing the steps mentioned in this document, there will be few configurations done at the Ameyo DB as well, for which the details will be provided by the designated project manager/engineer

14.5. Microsoft Dynamics CRM Toolbar Integration with Ameyo

Overview

This document outlines the procedure for integrating the Ameyo toolbar with Microsoft Dynamics (MSD) CRM. This integration embeds Ameyo's communication functionalities directly into the Dynamics 365 interface using the Channel Integration Framework (CIF). It enables features like Single Sign-On (SSO), screen pop-ups for incoming calls, and automated logging of call activities within Dynamics.

Key Benefits

- **Unified Agent Experience**: Agents can handle calls and access customer information within a single interface, eliminating the need to switch between applications.
- **Single Sign-On (SSO)**: Allows agents to log in to both Ameyo and Microsoft Dynamics using a single set of credentials, streamlining the login process.
- **Automated Call Logging**: Call details, including recording links and dispositions, are automatically saved as "Phone Call" activities in Dynamics, ensuring a complete record of customer interactions.
- **Multi-Factor Authentication (MFA) Support**: The integration is compatible with MFA configurations for enhanced security.

Functionality

- **Embedded Toolbar**: The Ameyo toolbar is embedded within the Dynamics 365 interface, providing agents with access to all telephony controls.
- **SSO Configuration**: The integration uses Microsoft Azure Active Directory to configure SSO, allowing Ameyo to authenticate users against Dynamics credentials.
- **Channel Integration Framework (CIF)**: Ameyo integrates with Dynamics through the CIF app, which facilitates communication between the third-party communication widget (Ameyo) and the CRM.

- **Custom Data Fields**: The integration allows for the creation of custom fields within the "Phone Call" activity entity in Dynamics. This enables the logging of Ameyo-specific data such as call recordings, dispositions, and agent details.
- **Server-Side Dumping**: The configuration supports server-side dumping, which allows call data and tokens to be managed directly from the server.

Prerequisites

- A Microsoft Dynamics 365 account with administrator privileges.
- Access to the corresponding Microsoft Azure portal with the same credentials.
- Your Ameyo domain name and port number.
- Your Dynamics CRM domain URL.

14.5.1. Microsoft Dynamics CRM App Creation and Installation

Overview

This document serves as a guide to configure the MSD CRM App at MSD application's end. Please follow all the steps for the configuration given below.

Usage Instructions

Create Microsoft Dynamic Account and do following configuration:

Step 1: Set Up Dynamics Account:

1.First, create an account or do sign up for MSD 365 from the below link :

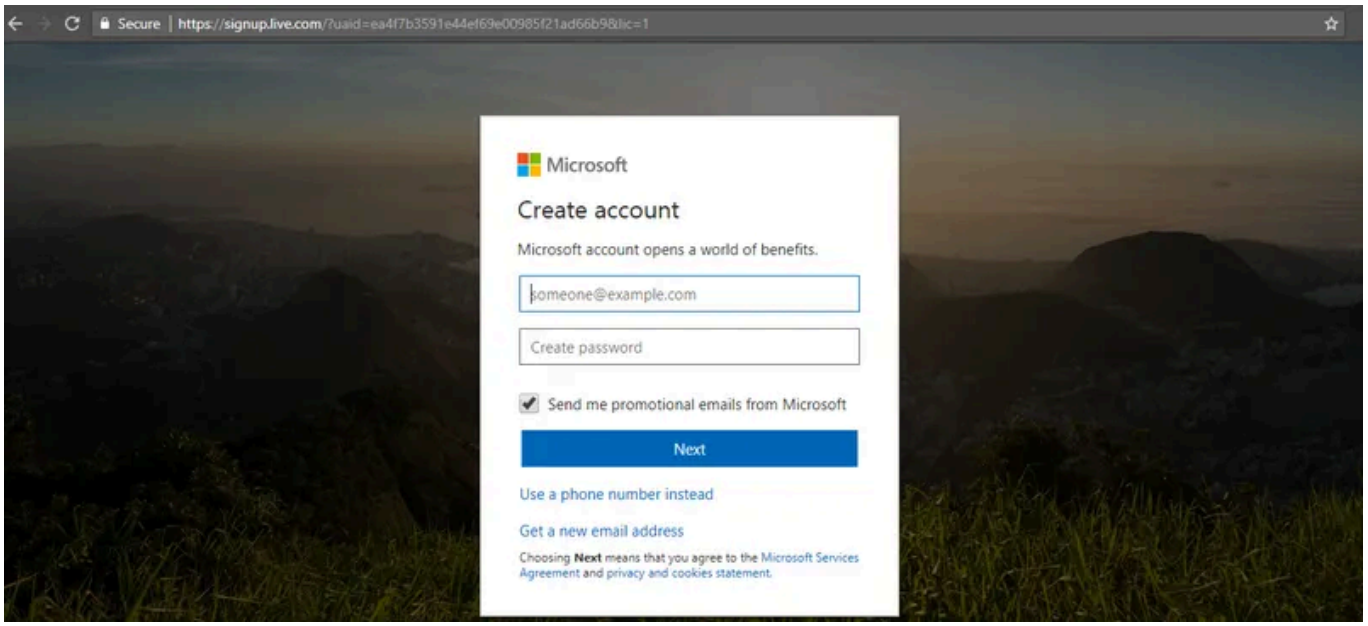
https://signup.microsoft.com/Signup?OfferId=bd569279-37f5-4f5c-99d0-425873bb9a4b&dl=DYN365_ENTERPRISE_PLAN1&Culture=en-us&Country=us&ali=1

Copy the Username and Password.

2.While creating the account select all services provided by

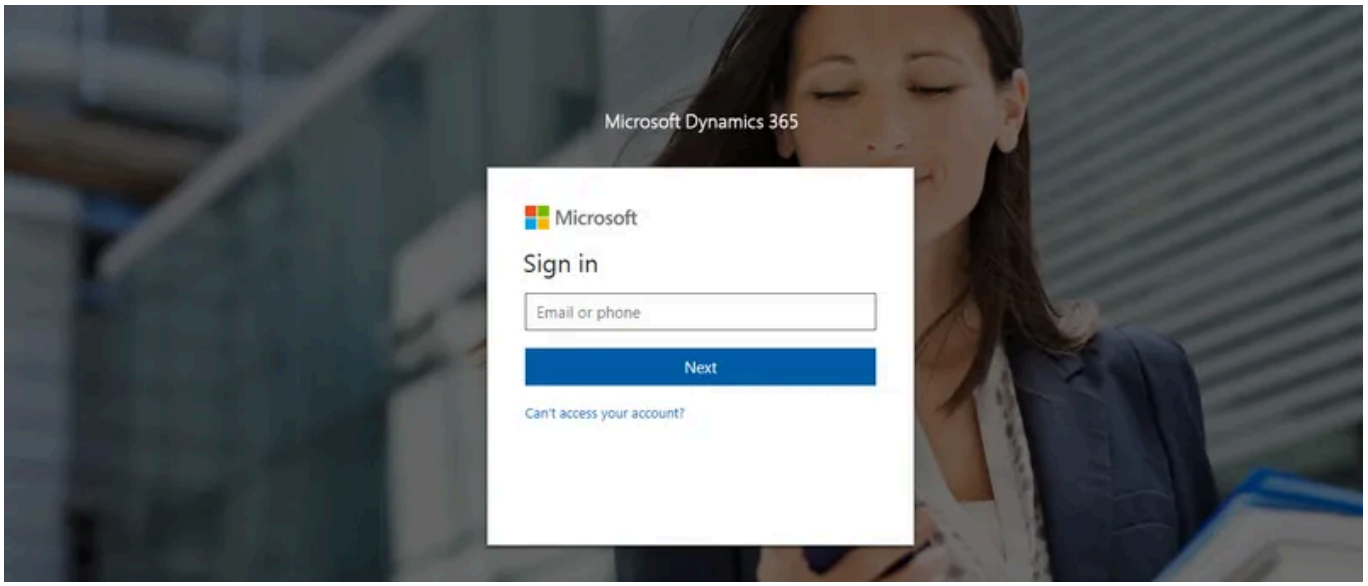
https://port.crm8.dynamics.com/G/TrialInstances/TrialInstancePicker.aspx

- now click on create your own trial
- now click on create new
- now select "All of these" checkbox and click on complete setup
- from here you can add the new instance as well and now copy the URL from the browser

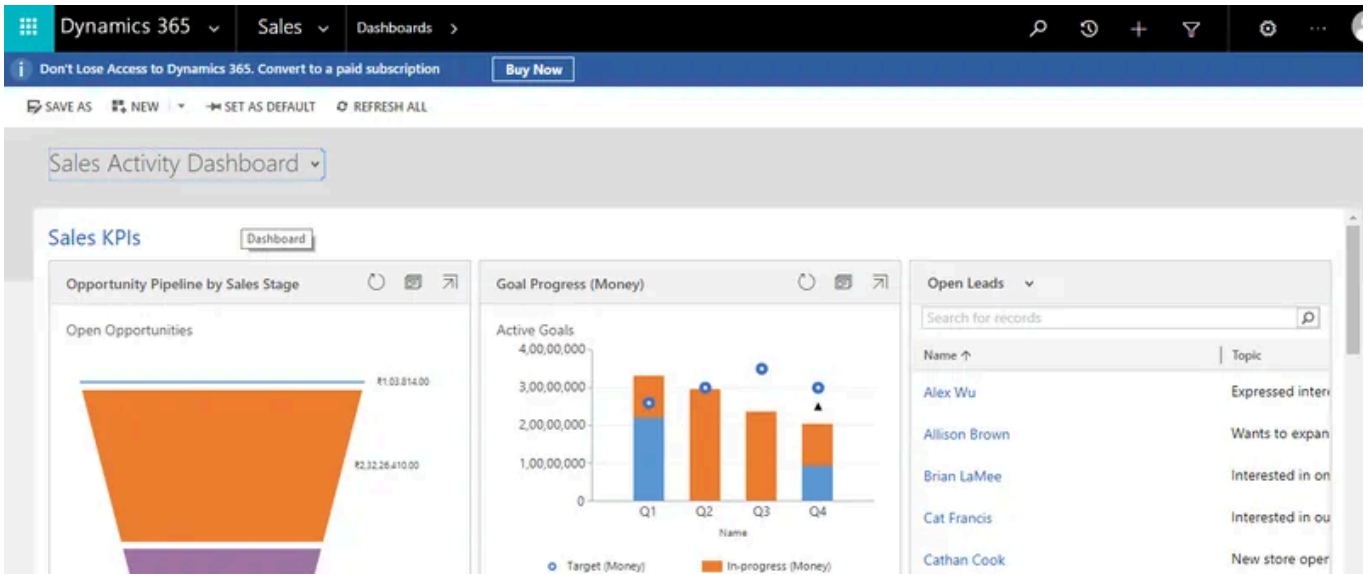


3.The user will do log in with the below URL with credentials, Username, and Password.

https://cxfusion.crm8.dynamics.com/

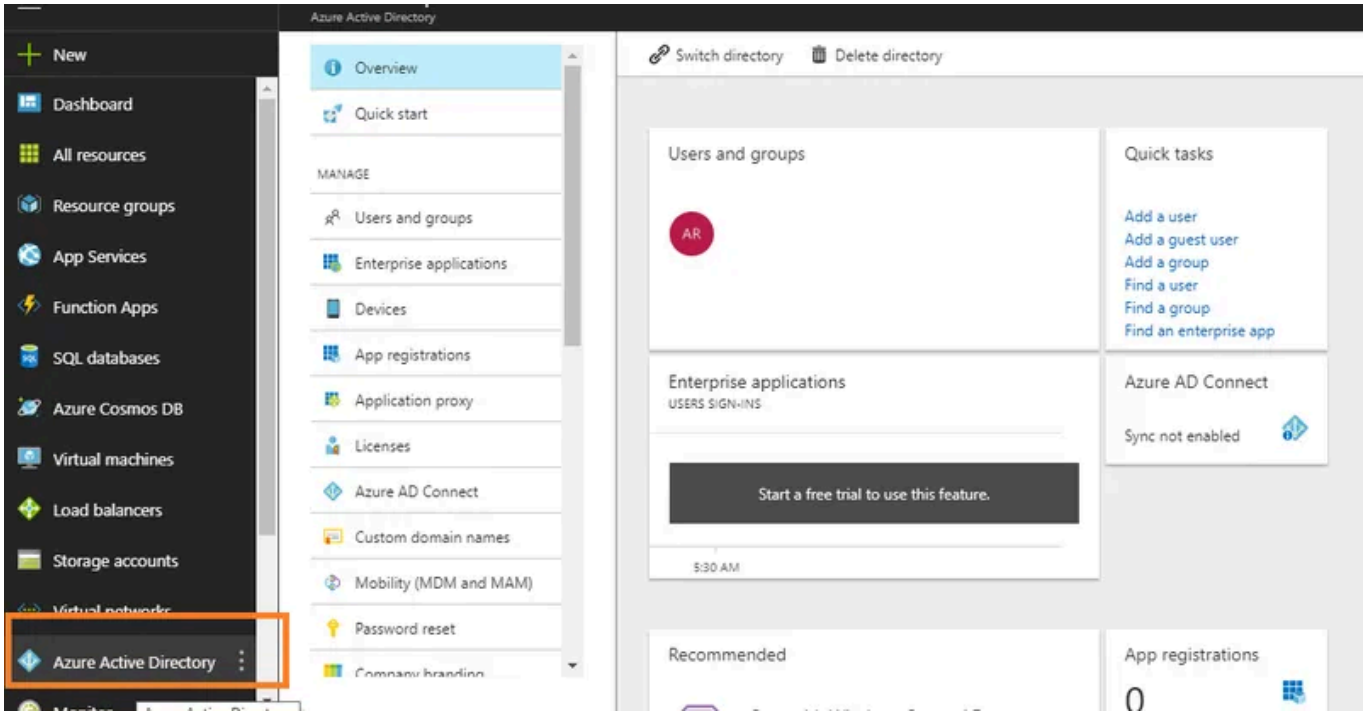


4.Now we will redirect to this page :

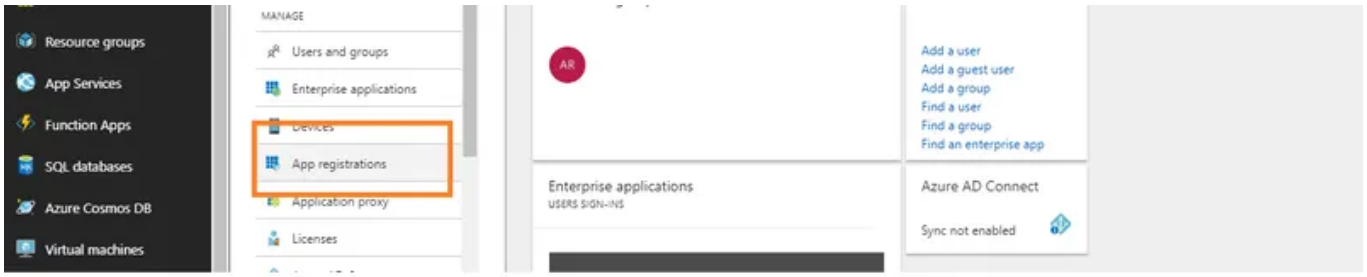


Step 2: Register an Application in Azure for SSO:

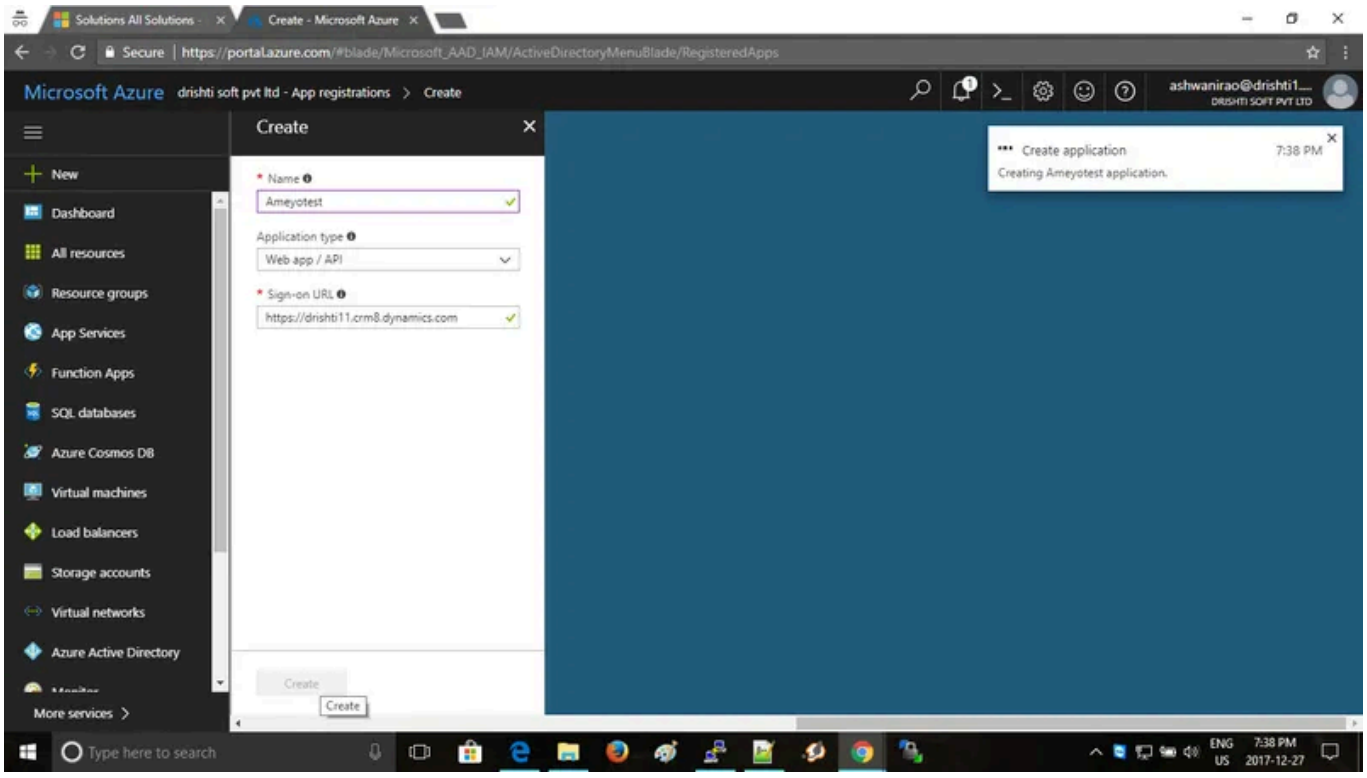
- Log in to the Microsoft Azure portal using your Dynamics credentials. Steps to create APP in Azure https://portal.azure.com/#blade/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/Overview
- Navigate to **Azure Active Directory** from the left-hand menu.



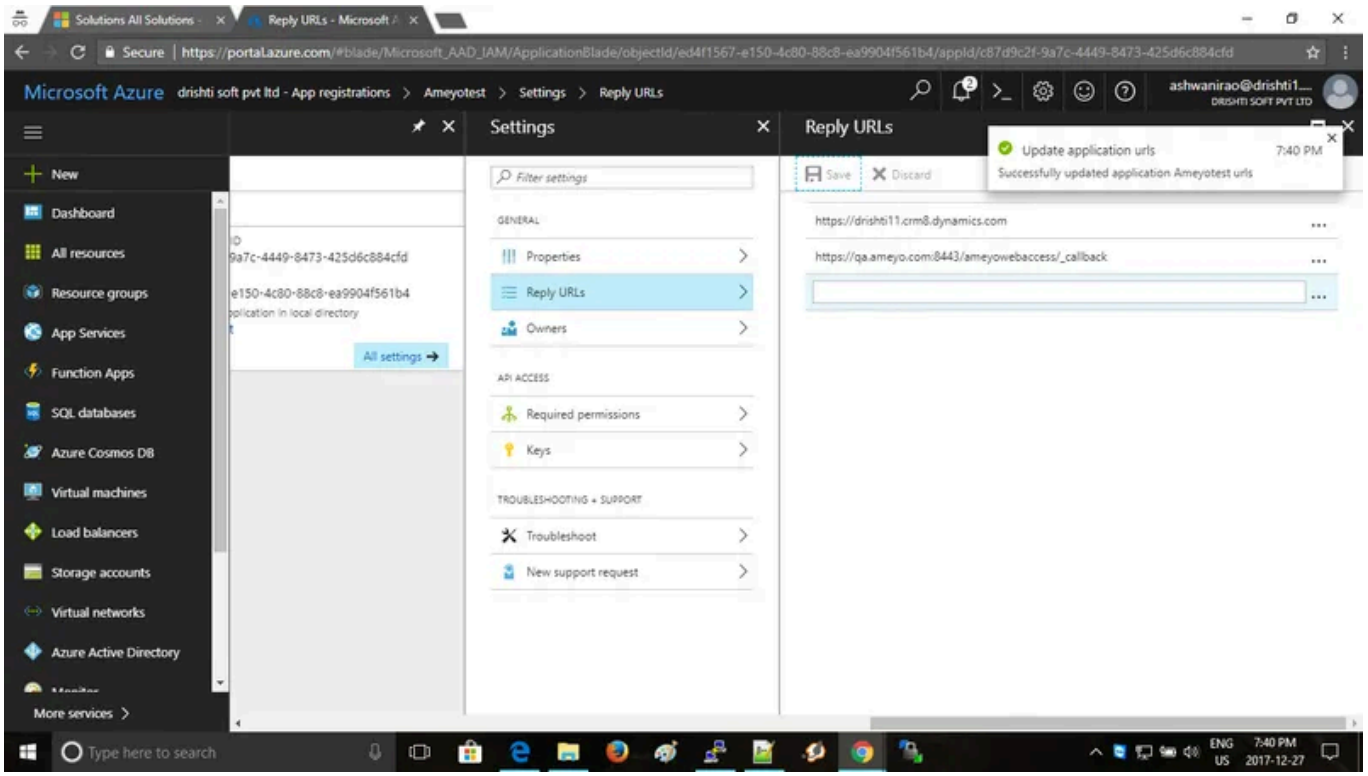
- Click on **App Registration** and **provide a nam**e and now click on add **new app** and provide the details for the app



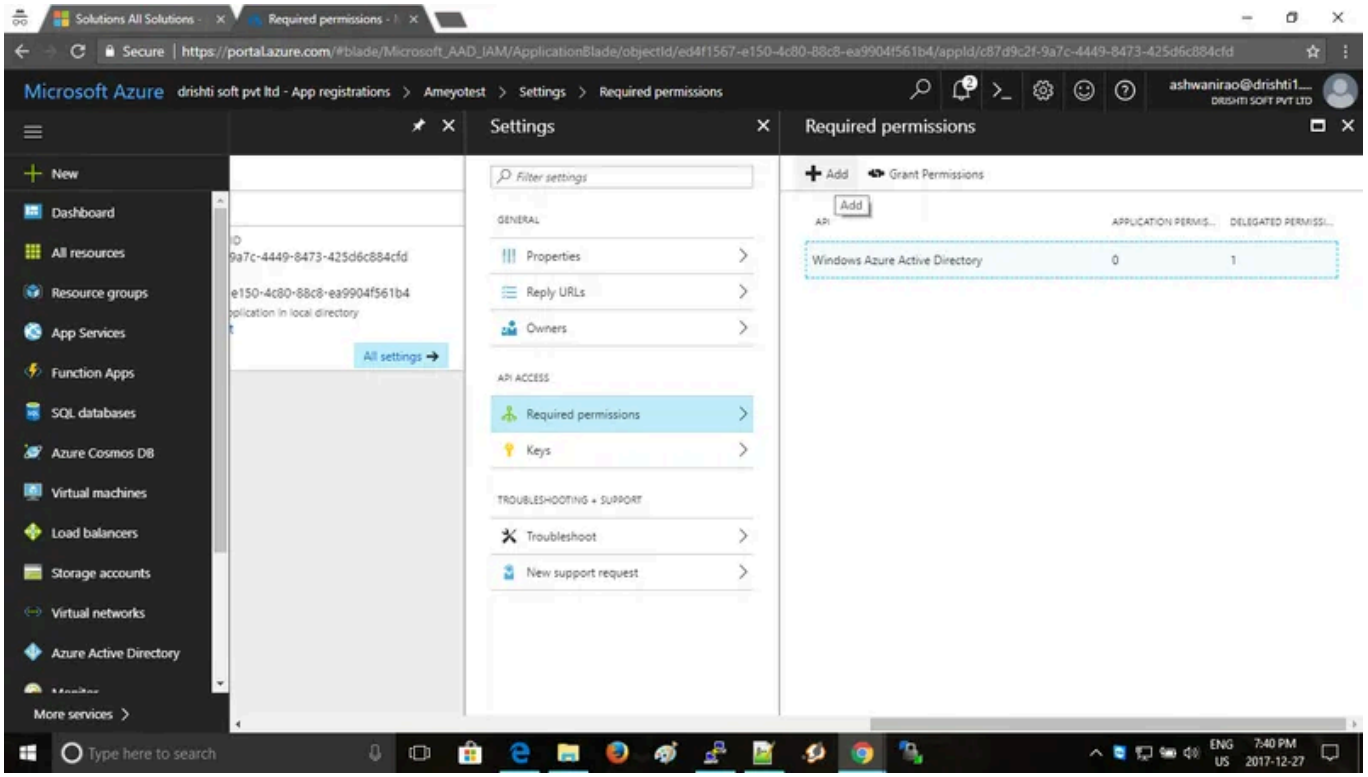
- Set the **Application type** to "Web app / API". After that enter Web API and MSD CRM URL will be entered. Now provide the details for the app as given below :
- In the **Sign-on URL** field, enter the URL of your app. Click **Create**.
- Now click outside this box it will validate all the details and then create button will highlight.



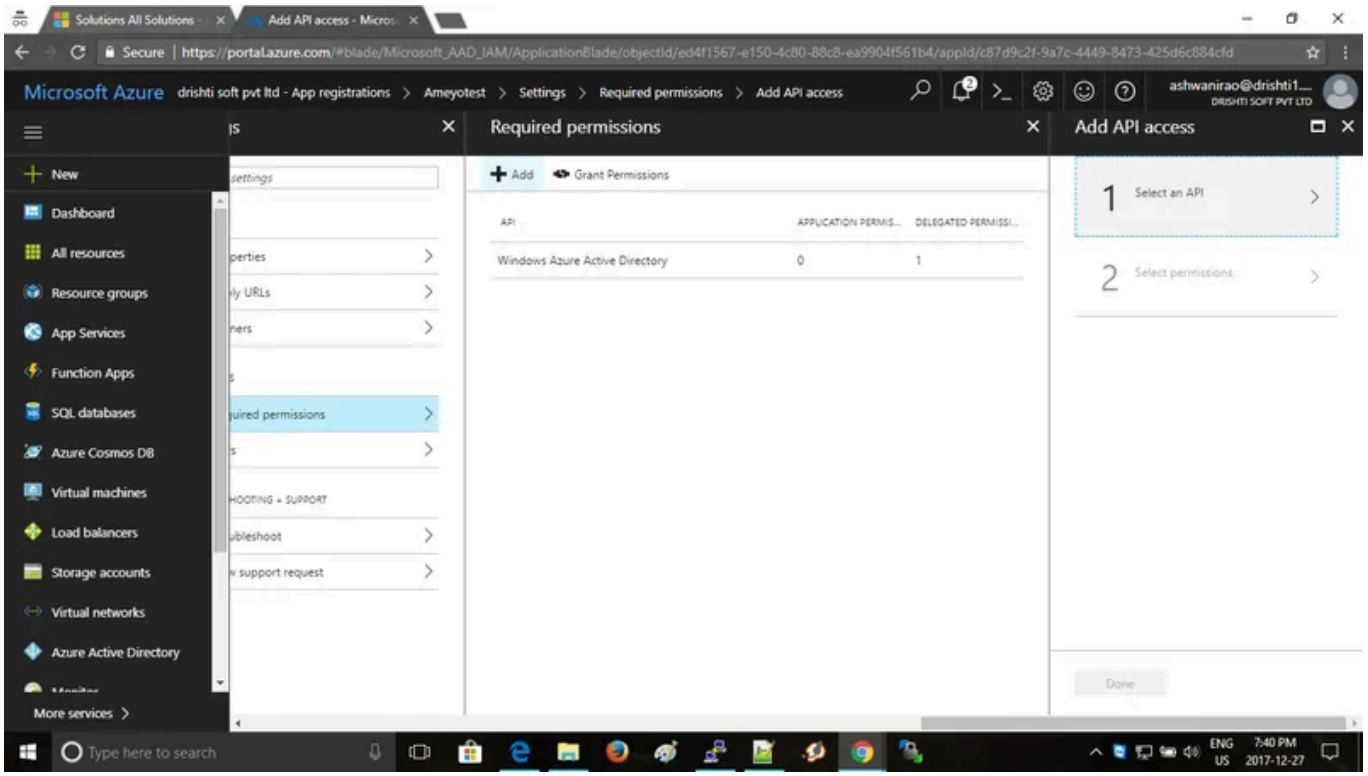
Now go to the **app >> settings** and then provides the **Reply URLs** as given below :



- Now to the **app name >> settings >> required permission** as given in below screenshot :

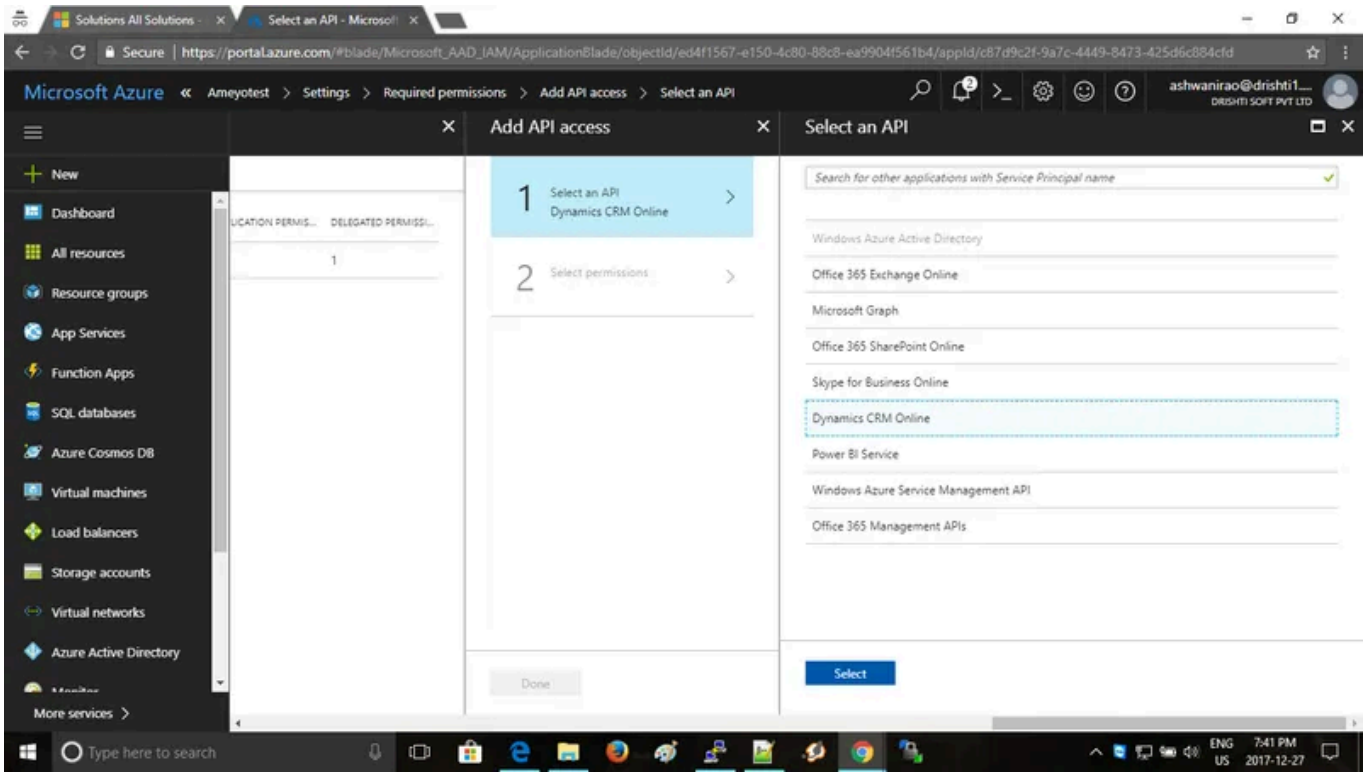


- Now go to the **app name >> settings >> required permission** and add the API access as given below :

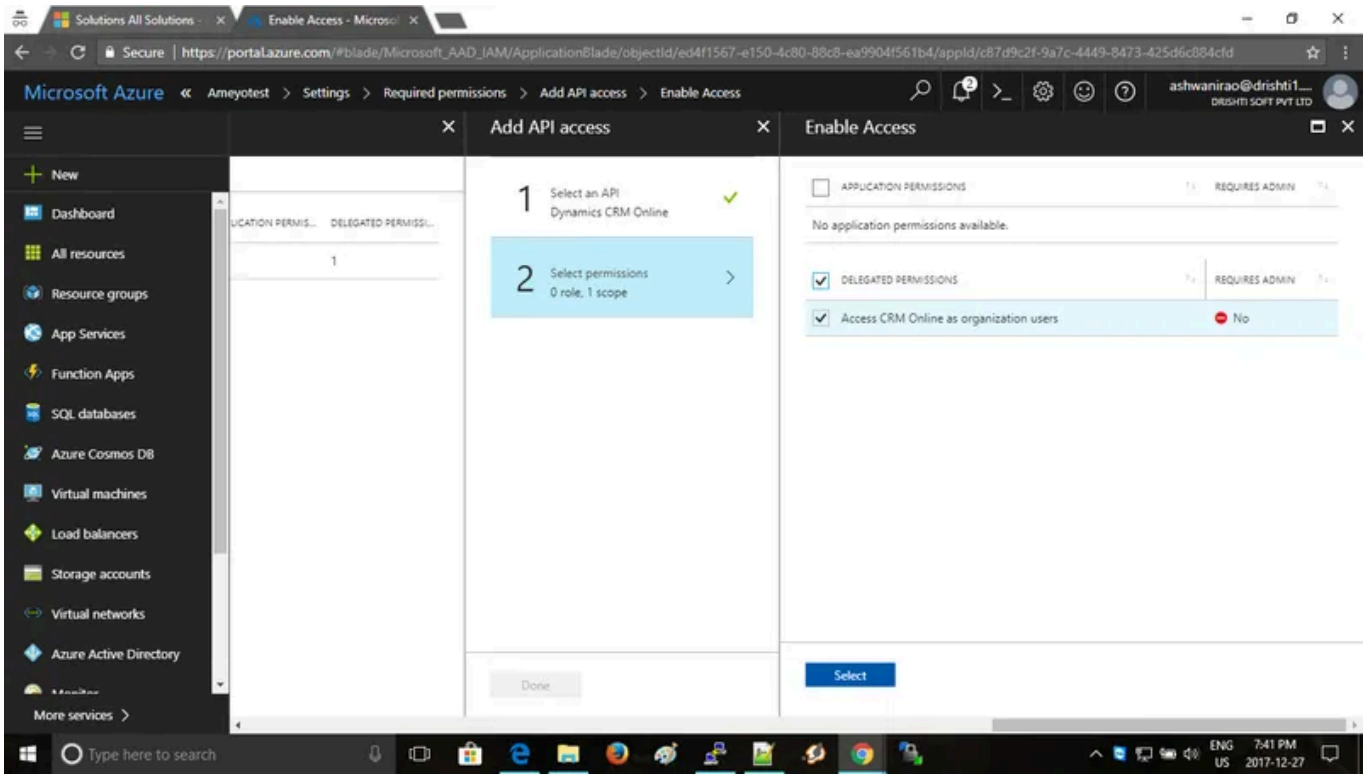


Step 3: Grant API Permissions:

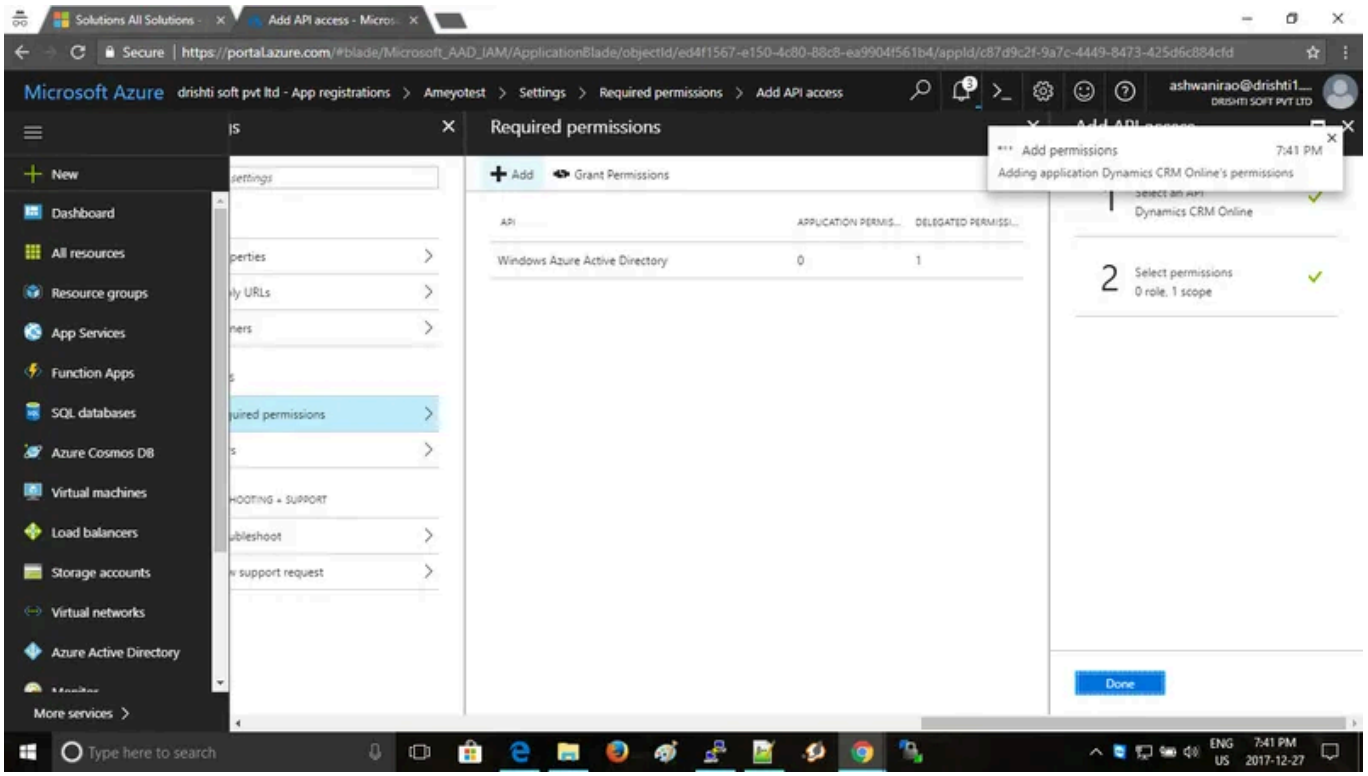
- Navigate to **API permissions**. Now go to the **app >> settings >> required permission >> add api access >> select an API** and select the **DYNAMIC CRM ONLINE (Or Common Data Service)**



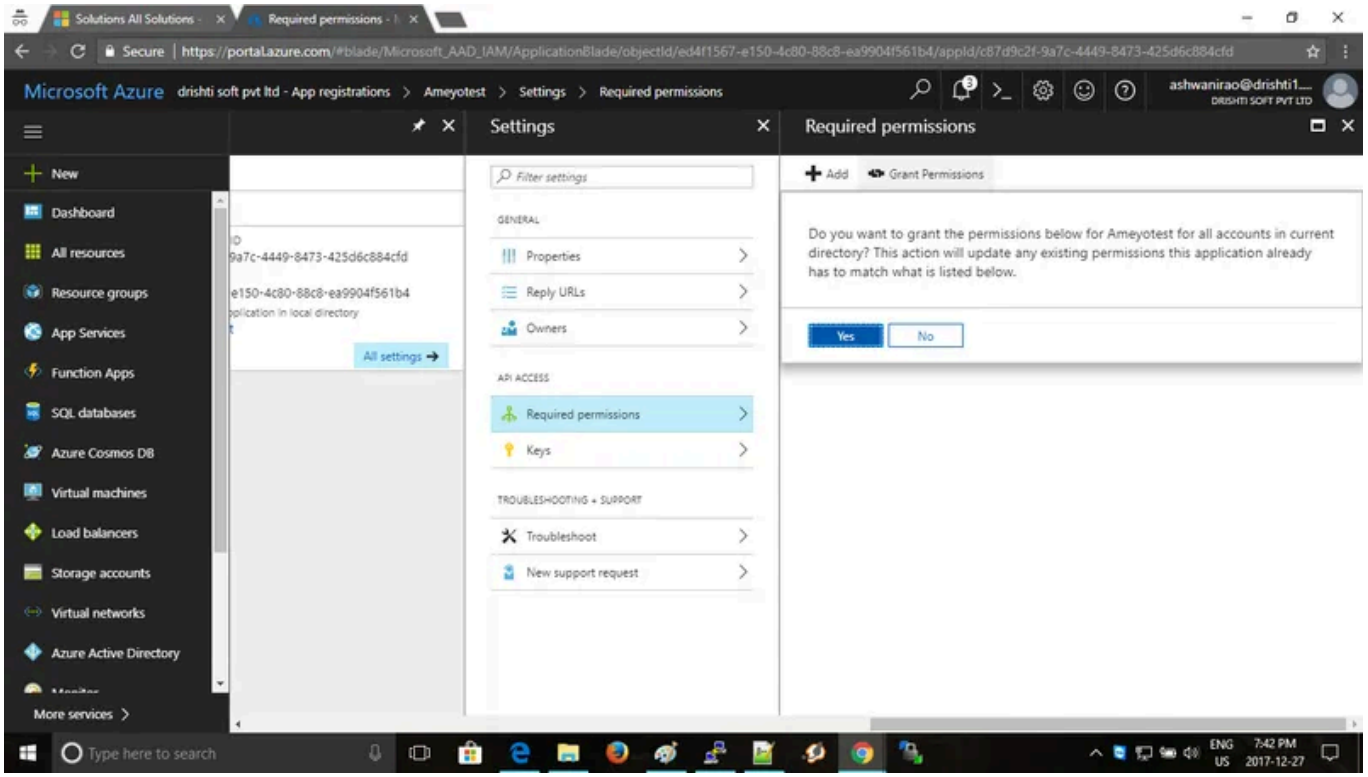
- Now select the **app >> settings >> required permission >> add API access >> enable access** as provided in the below screen shot:



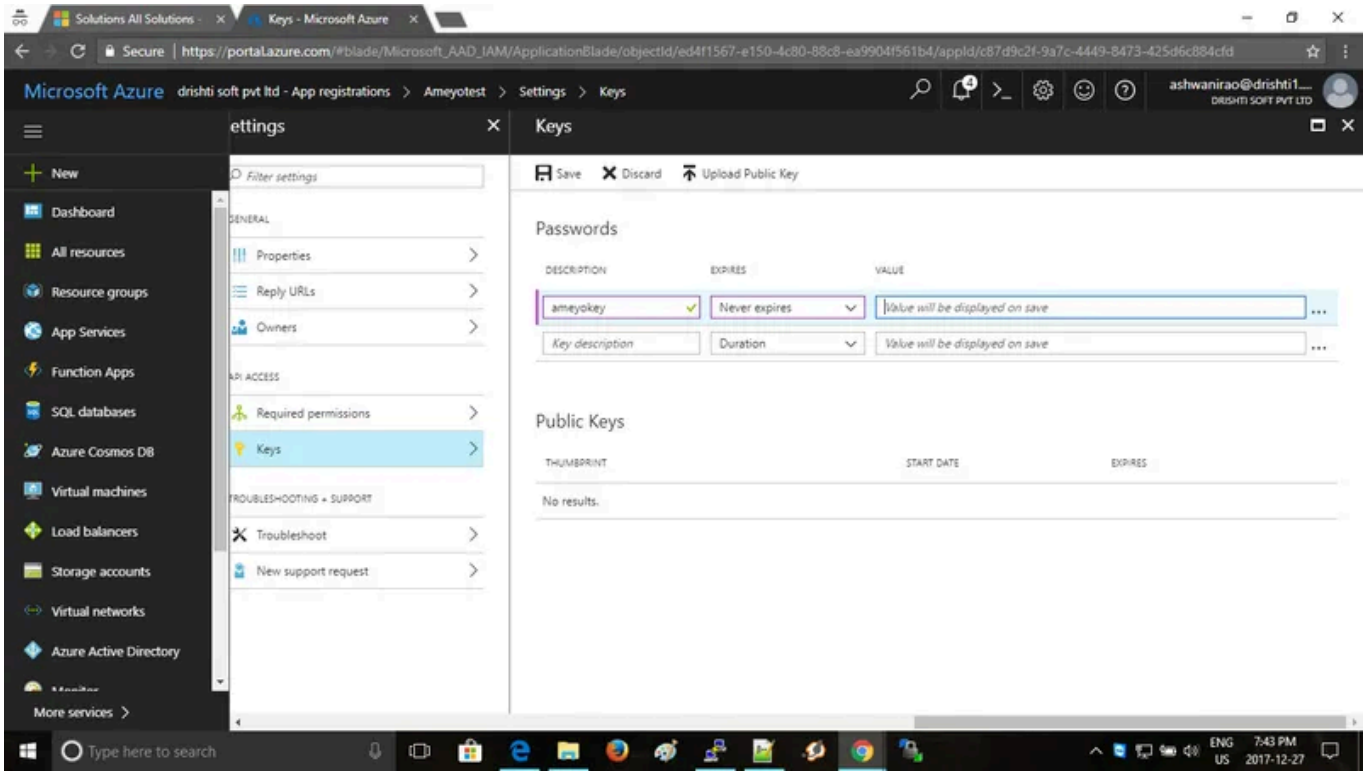
- Now add the API access as given in the below screen shot :



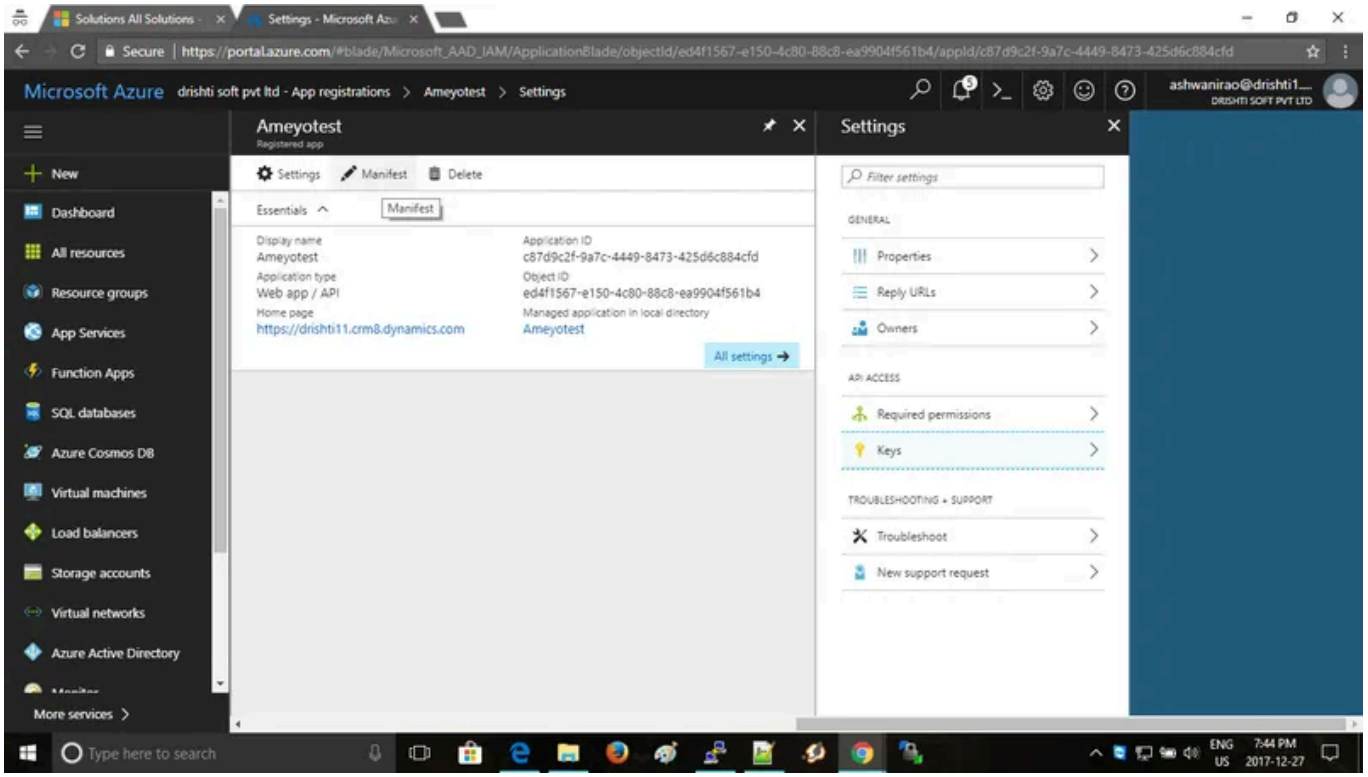
- Click the **Grant admin consent** button to apply the permissions. Confirm by clicking "Yes".



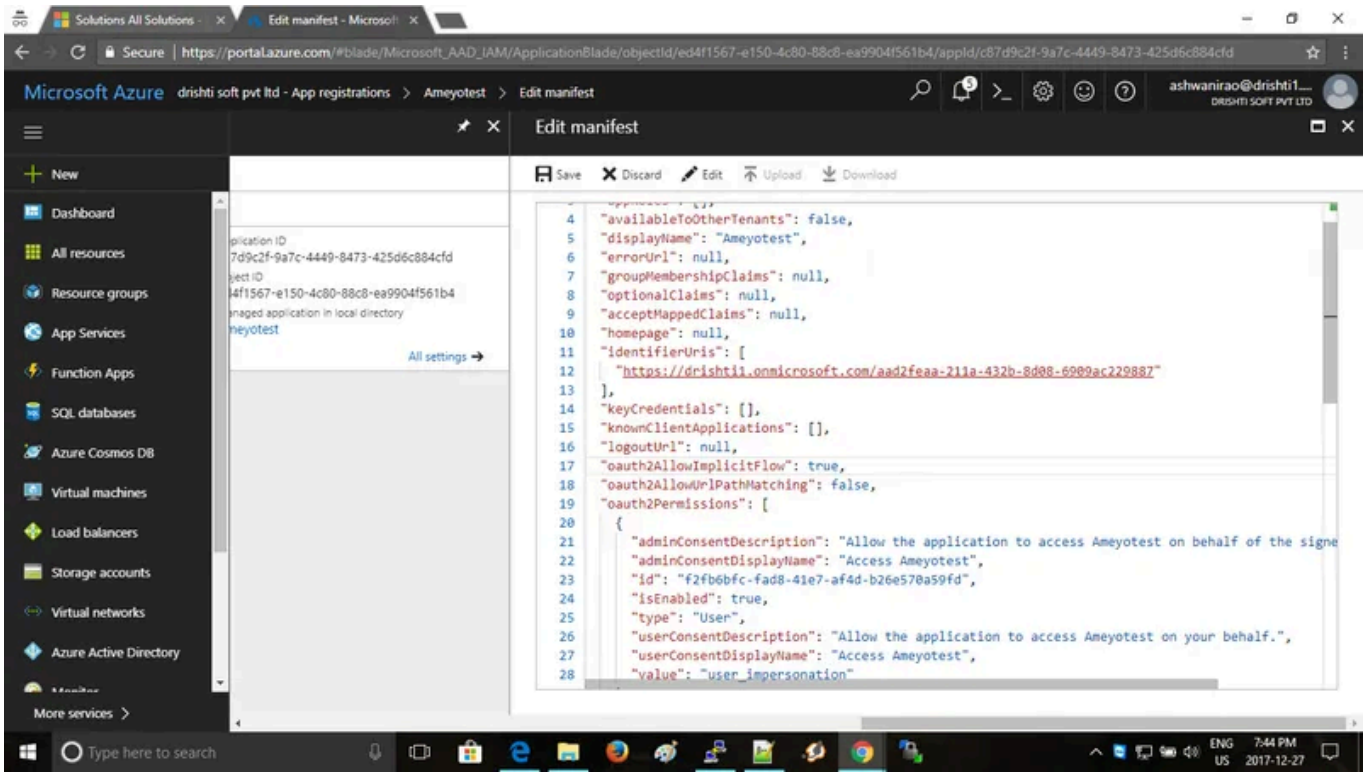
- Now go to the keys and copy the **client secret** from here and save the same somewhere (important) and provide the details as given in below screen shot:



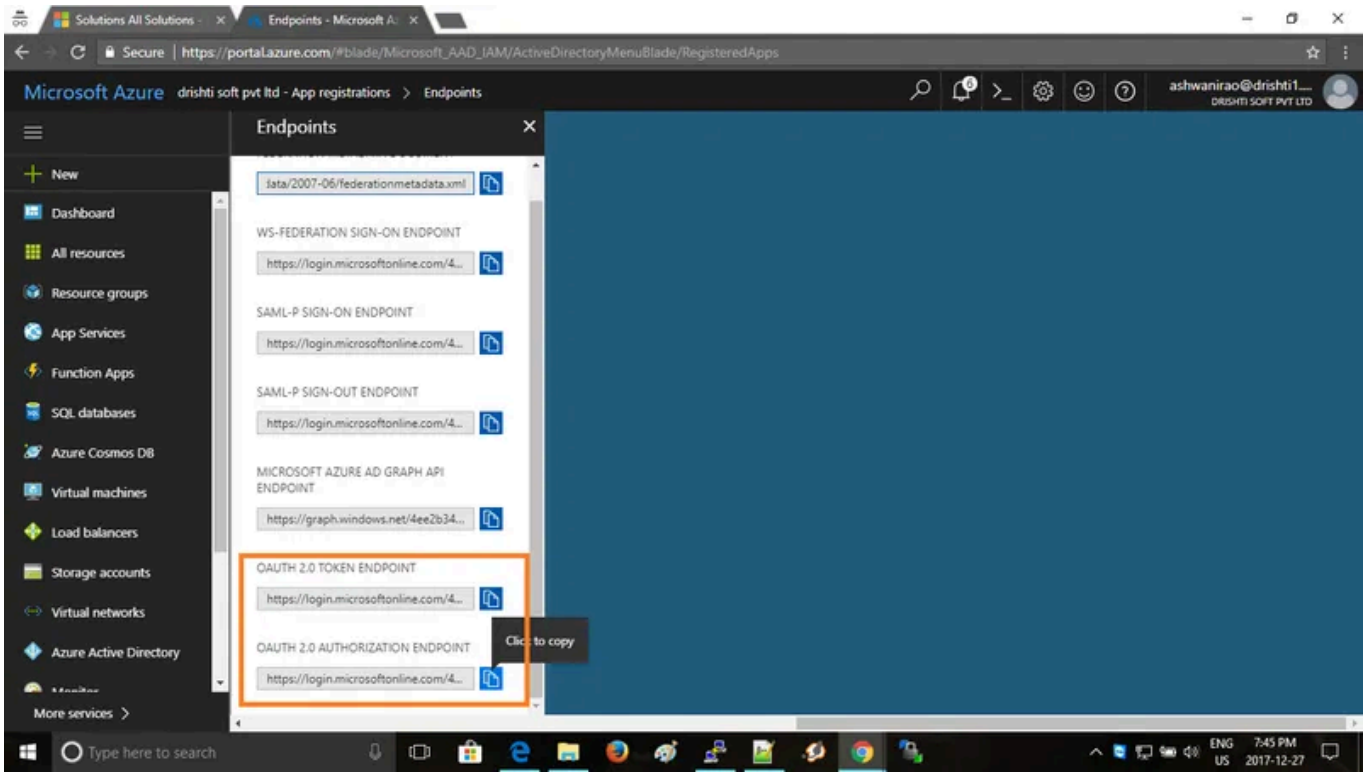
- Now copy the application ID from the below screenshot:



- Now edit the manifest and provide the oauth2AllowImplicitFlow as TRUE:



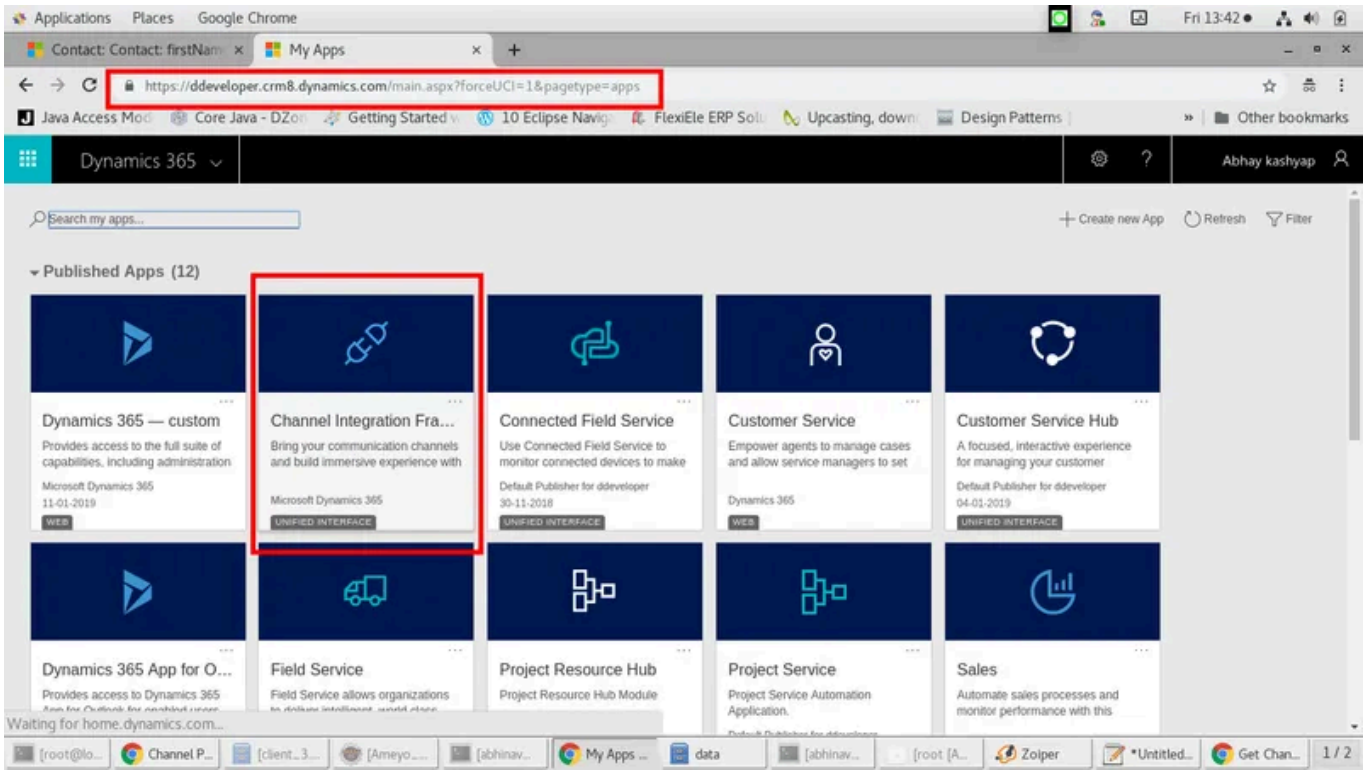
Now copy the OAUTH 2.0 TOKEN ENDPOINT and OAUTH 2.0 AUTHORIZATION ENDPOINT from the endpoints as given below: - **USE ONLY OAUTH2 V1.0 URLs - https://login.microsoftonline.com/b699289e-9677-4e1a-a46e-3b7xt4dcefe9/oauth2/authorize**



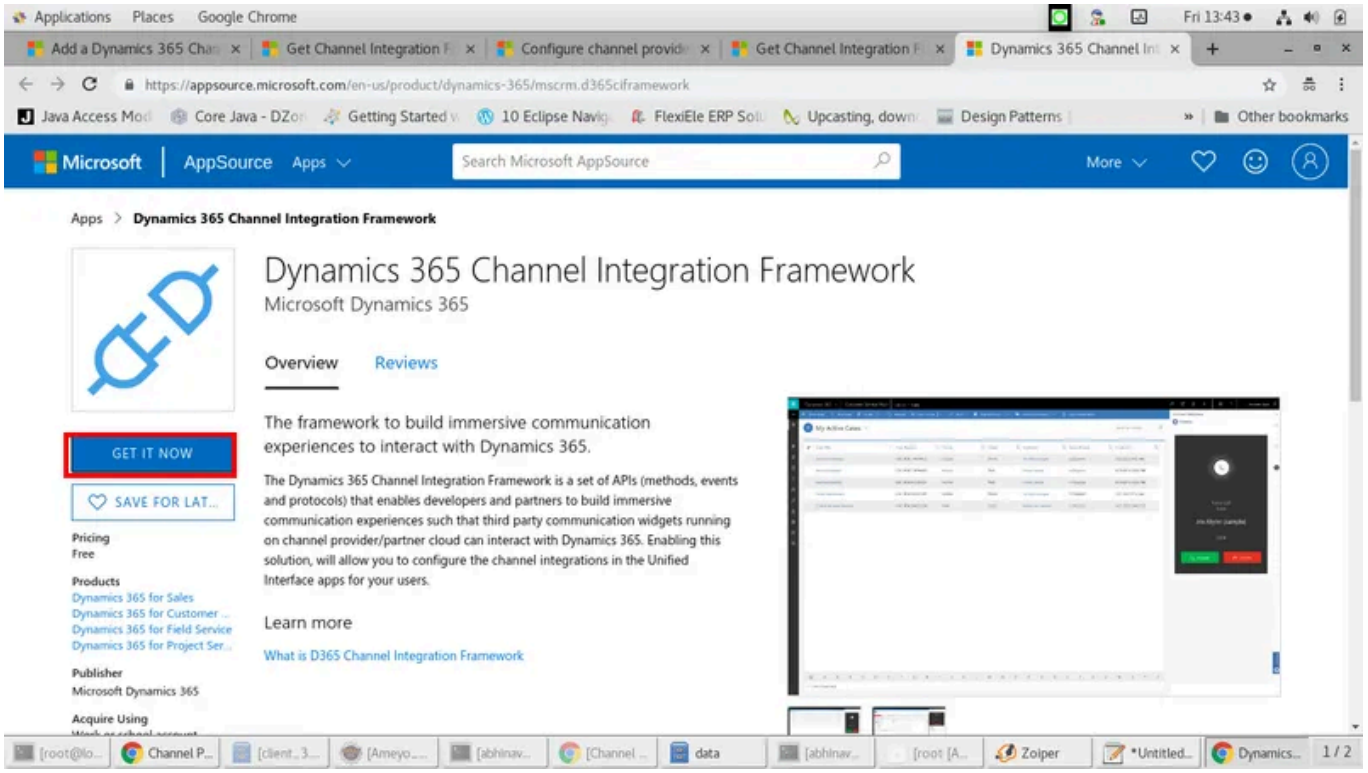
Configuration To Enable Channel Specific Framework in Microsoft Dynamics

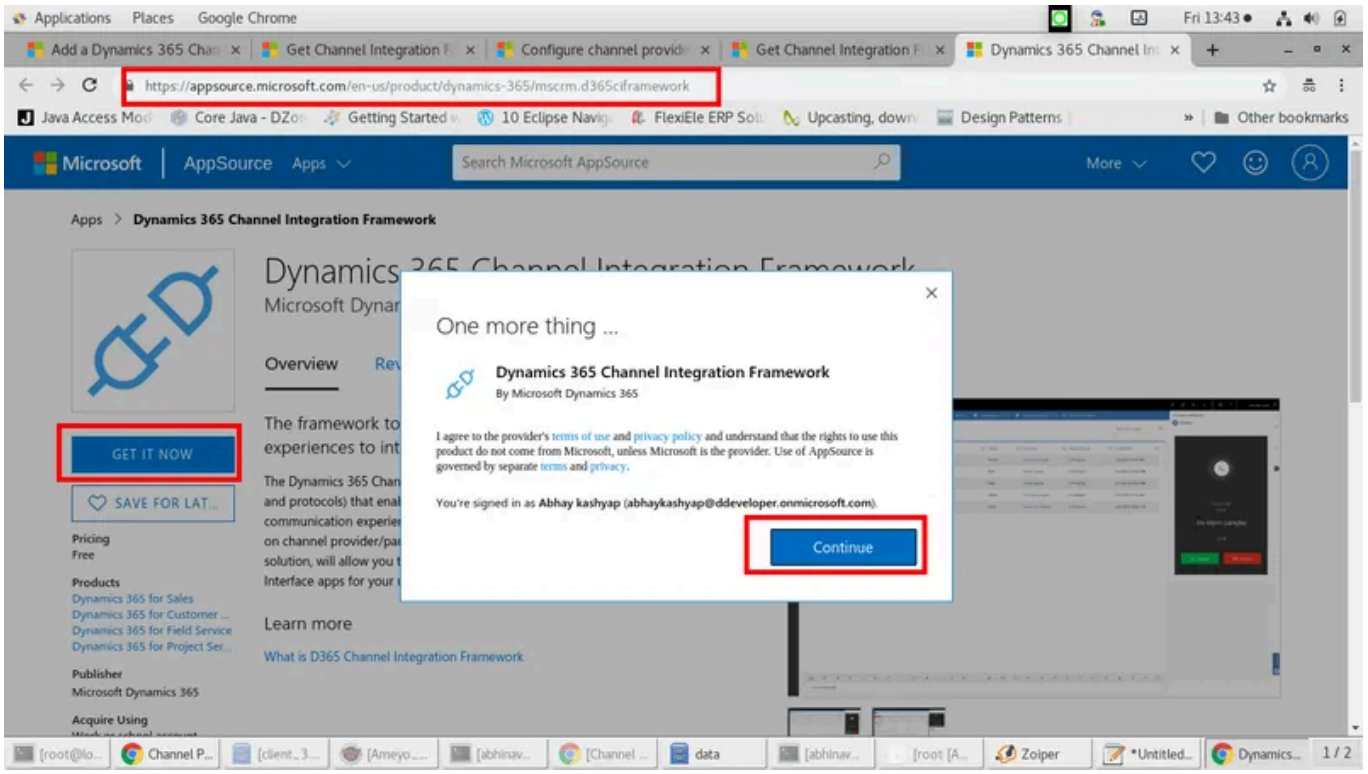
1. open your app page in microsoft crm dynamics. eg.

   https://<orgURL>.dynamics.com/apps

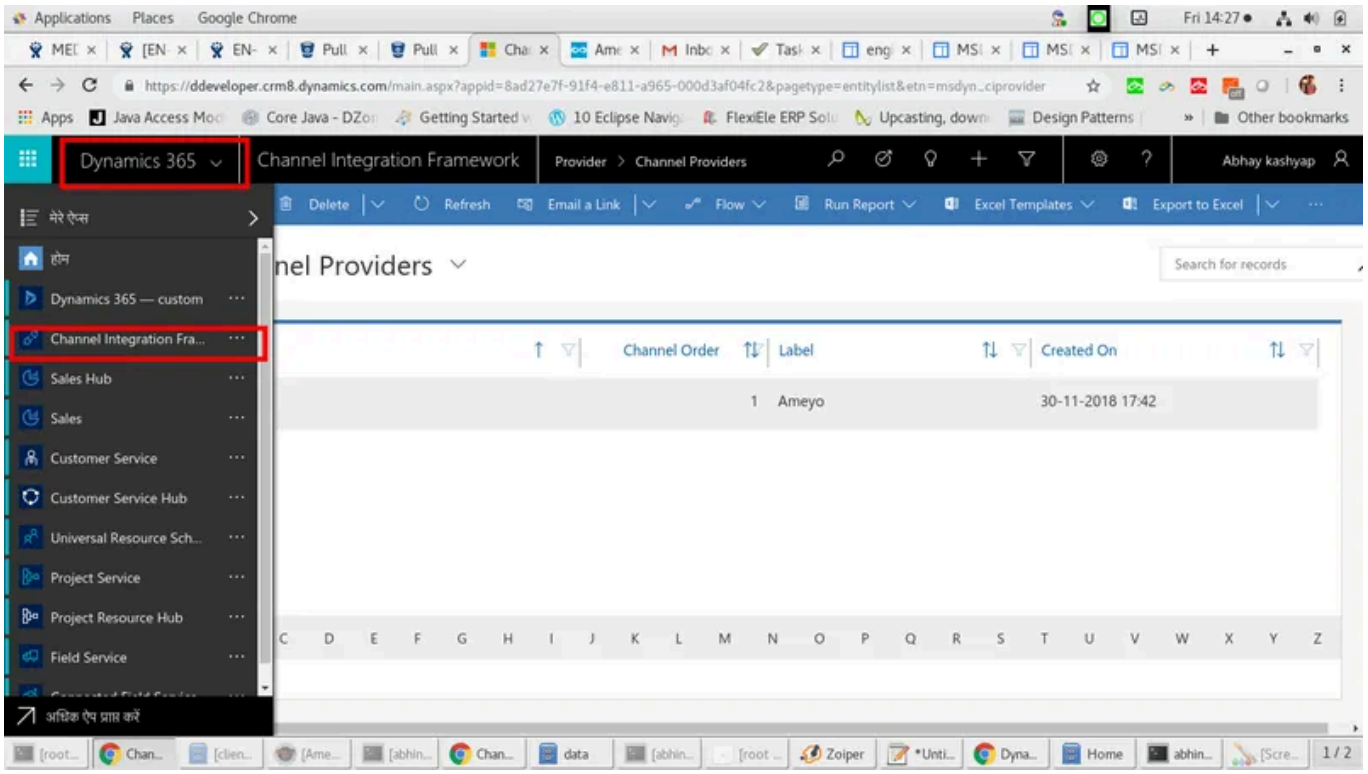


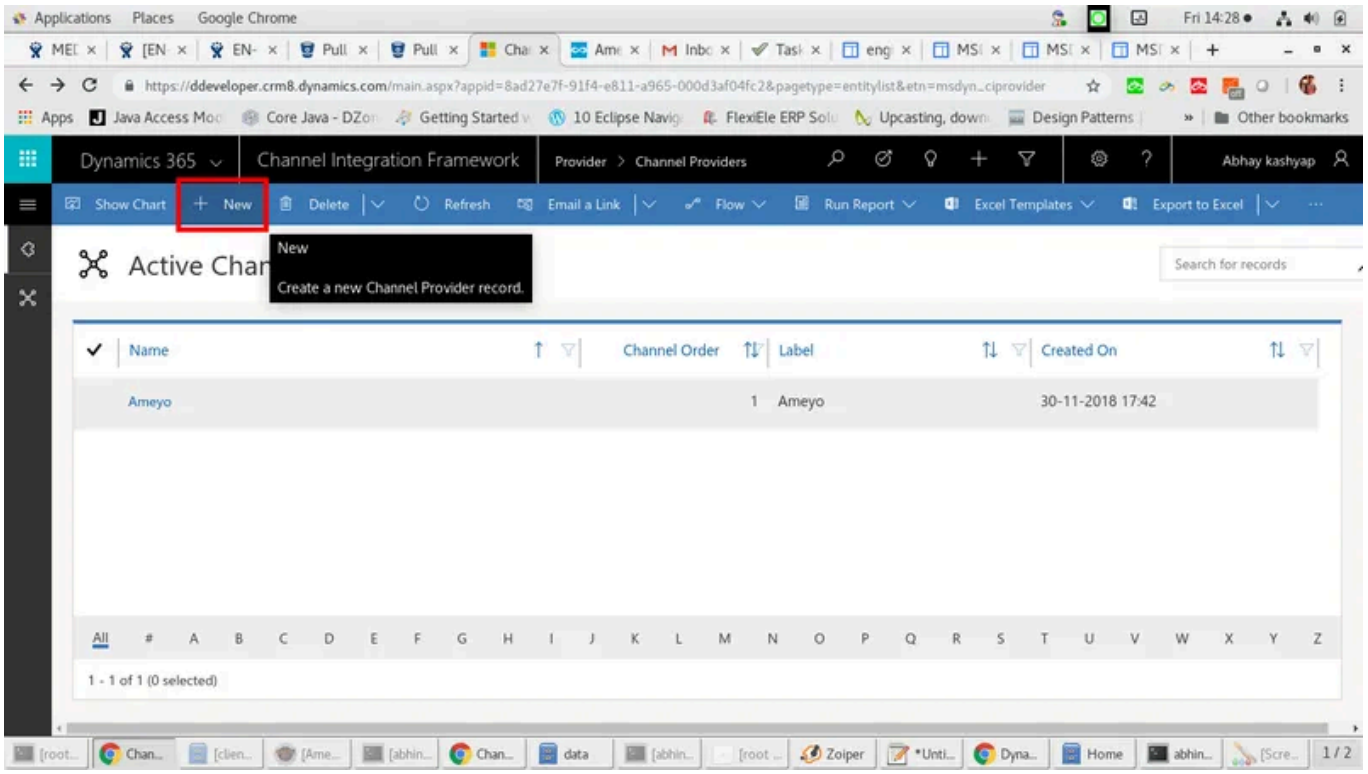
2. Click on Channel Specific option.
3. (or) go to https://appsource.microsoft.com/en-us/product/dynamics-365/mscrm.d365ciframework and click on **GET IT NOW.**

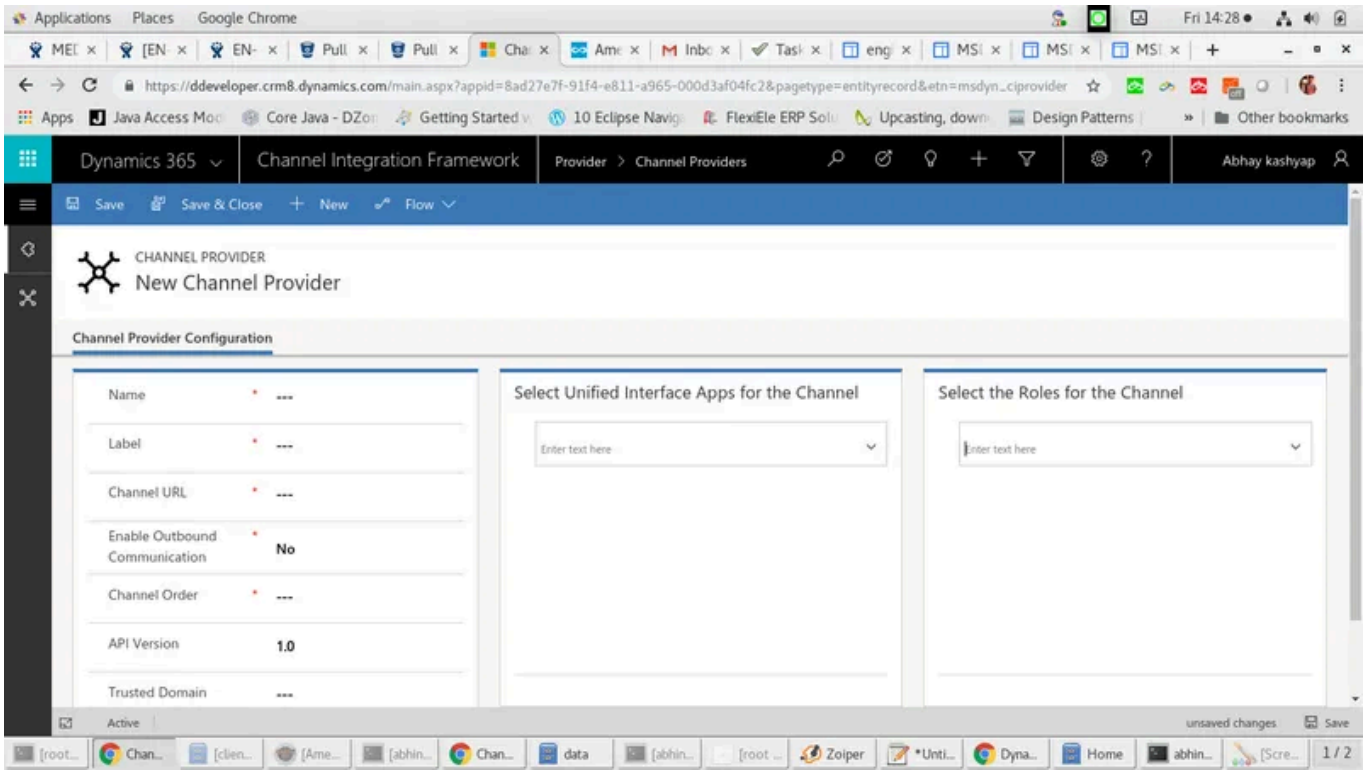


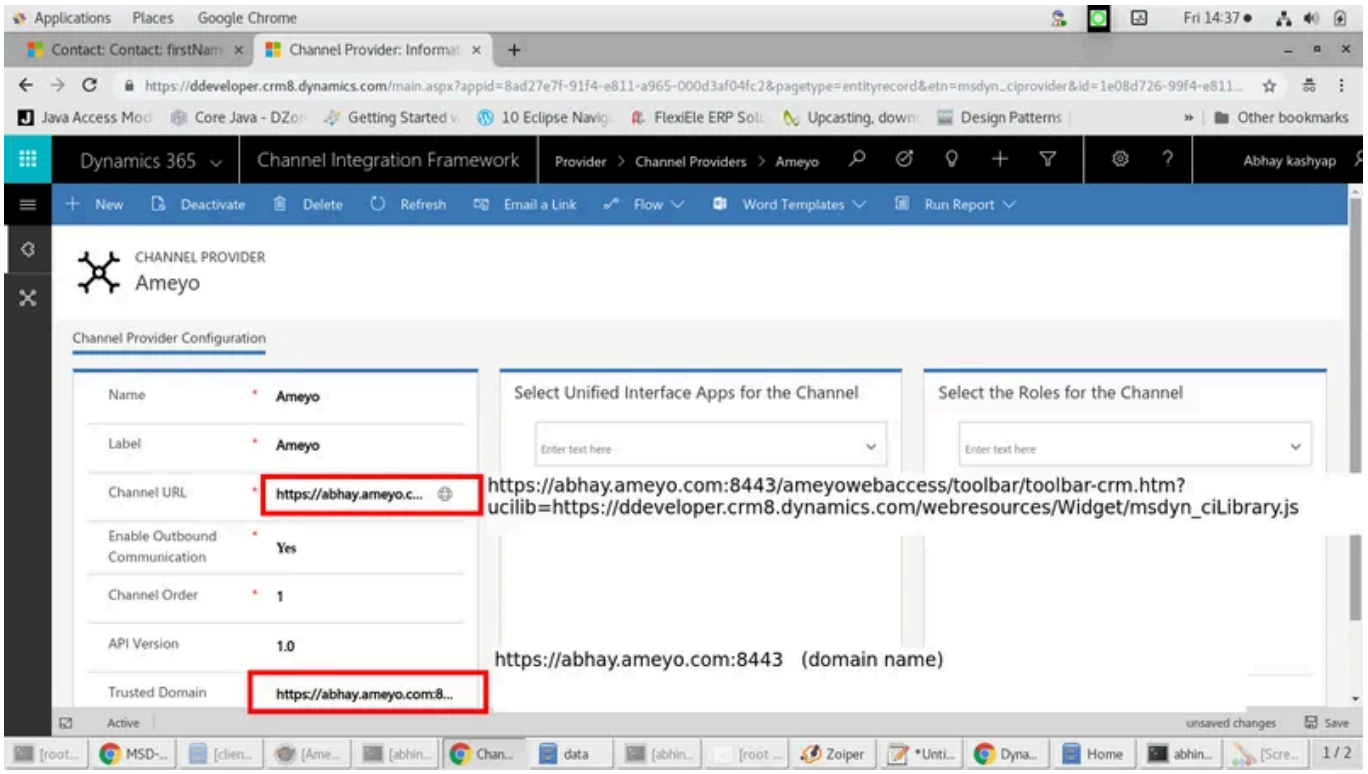


4. Now you have enabled CIF.
5. Now go to you dynamic home, click on drop down > (in all apps) select Channel specific Framework app > create a new app and fill the details.

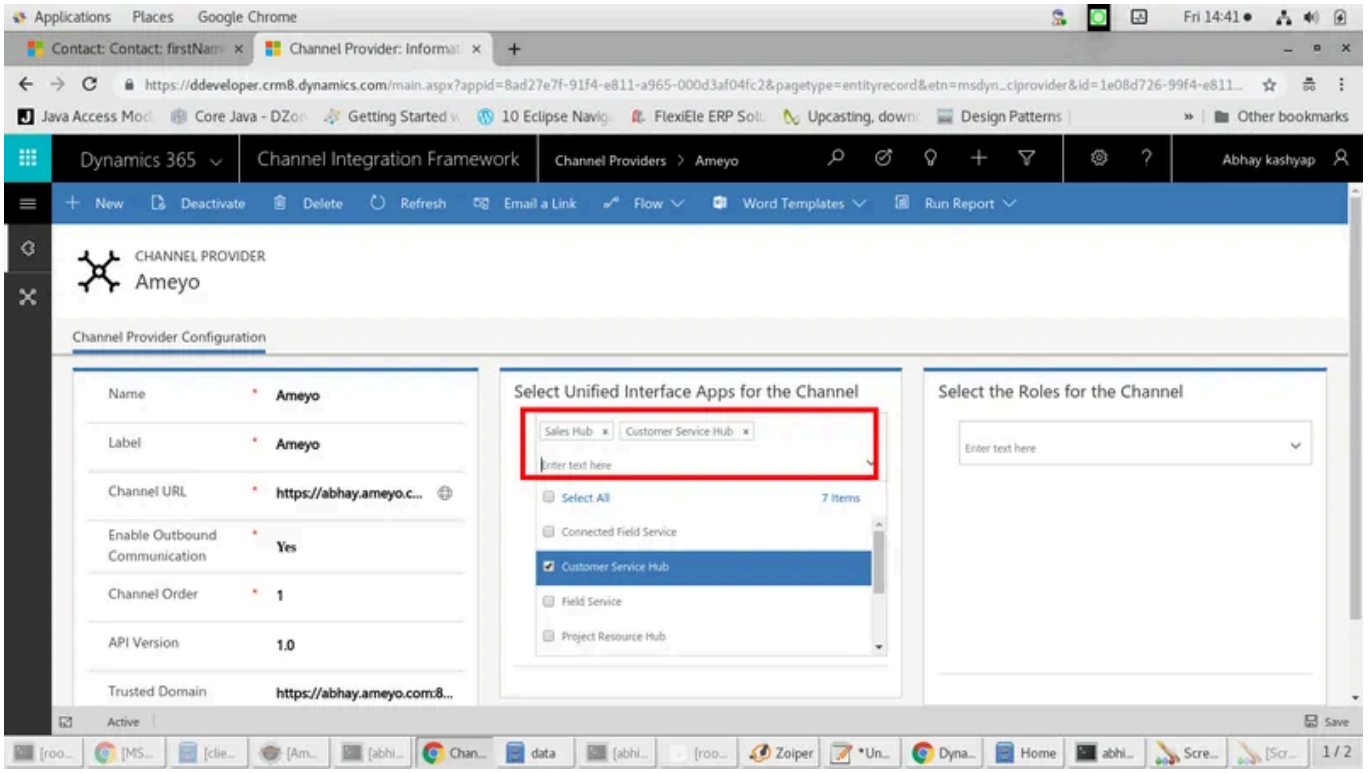



Dynamics 365
Channel Integration Framework
Provider > Channel Providers
Abhay kashyap
Show Chart
New
Delete
Refresh
Email a Link
Flow
Run Report
Excel Templates
Export to Excel
New
Create a new Channel Provider record.
Active Chan
Search for records
Name
Channel Order
Label
Created On
Ameyo
1
Ameyo
30-11-2018 17:42
All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
1 - 1 of 1 (0 selected)


Dynamics 365
Channel Integration Framework
Provider > Channel Providers
Abhay kashyap
Save
Save & Close
New
Flow
CHANNEL PROVIDER
New Channel Provider
Channel Provider Configuration
Name * ---
Label * ---
Channel URL * ---
Enable Outbound Communication * No
Channel Order * ---
API Version 1.0
Trusted Domain ---
Select Unified Interface Apps for the Channel
Enter text here
Select the Roles for the Channel
Enter text here
Active
unsaved changes
Save



In Select Unified Interface Apps for the Channel -- Ameyo Toolbar Supports In Sales Hub Tab And Customer Service Hub. Except These Two Other Tab May Not Support Ameyo Toolbar.



- Enter all fields, channel URL will be:

https://<your server domain>/ameyowebaccess/toolbar/toolbar-crm.htm?ucilib=https://<msd domain>/webresources/Widget/msdyn_ciLibrary.js

eg. https://abhay.ameyo.com:8443/ameyowebaccess/toolbar/toolbar-crm.htm?ucilib=https://ddeveloper.crm8.dynamics.com/webresources/Widget/msdyn_ciLibrary.js
And than Click on SAVE AND CLOSE

Data Fields Configuration (Phone Call Activity)

To start Ameyo service on Microsoft Dynamics Account, configure data fields to the App so that the Ameyo user can use these data fields during the work. These data fields help the user to fill the customer's information about the phone call.

Perform the following steps to configure and store the Phone Call activities in the CIF account.

1. Go back to the home of Microsoft Dynamics account.
2. Select "Dynamics 365 Custom" App from the main menu.

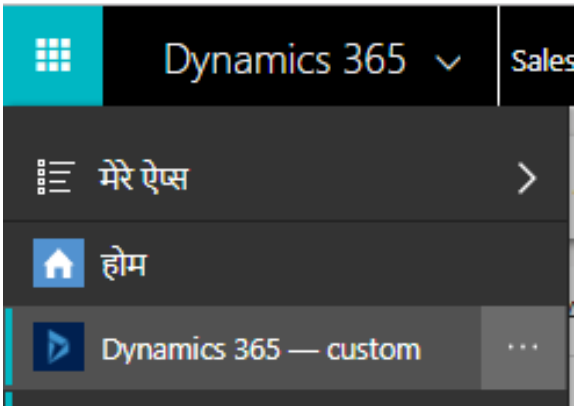


Figure: Dynamics Custom App

3. Click "Settings" icon, followed by "Advanced Settings" option from the list of settings located in the top right corner of the page.

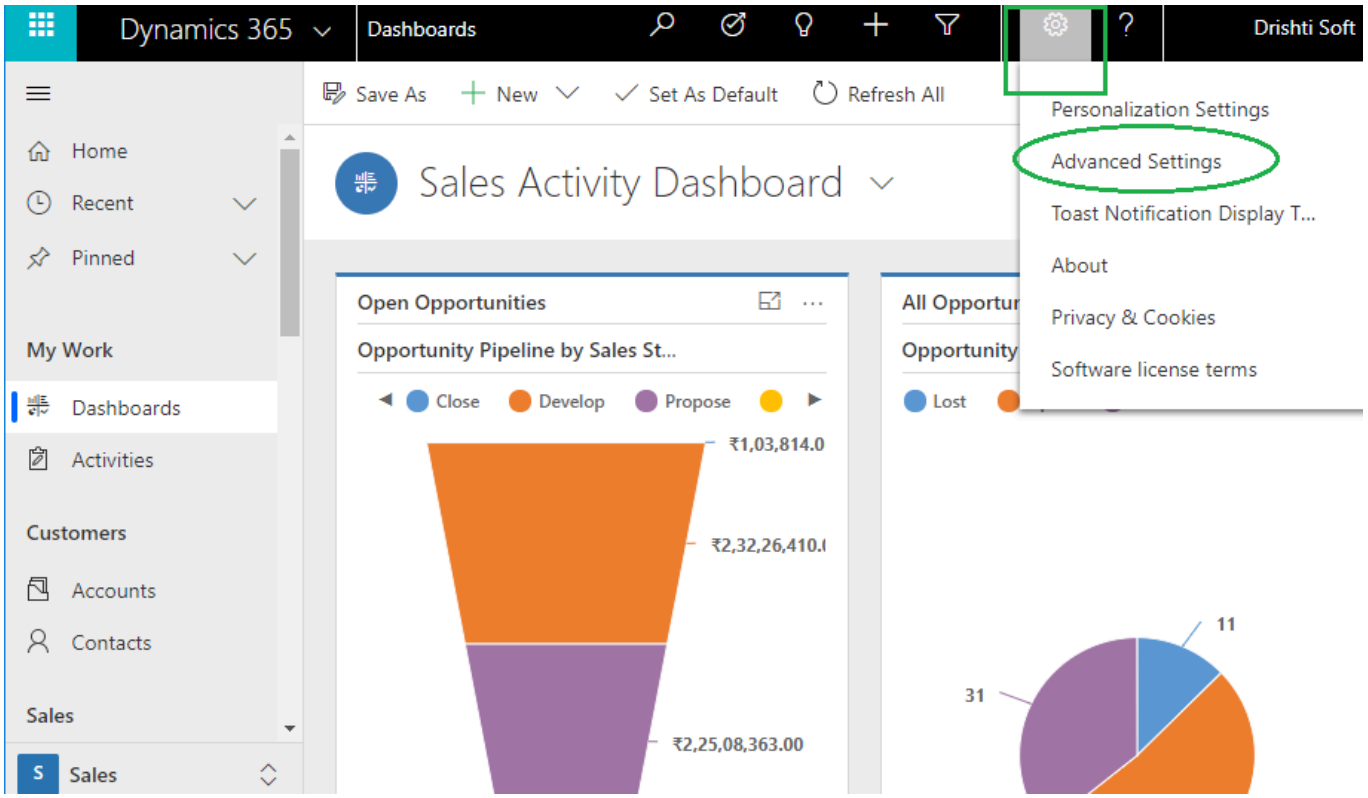


Figure: Custom Settings icon

4. It shows the following page of settings.

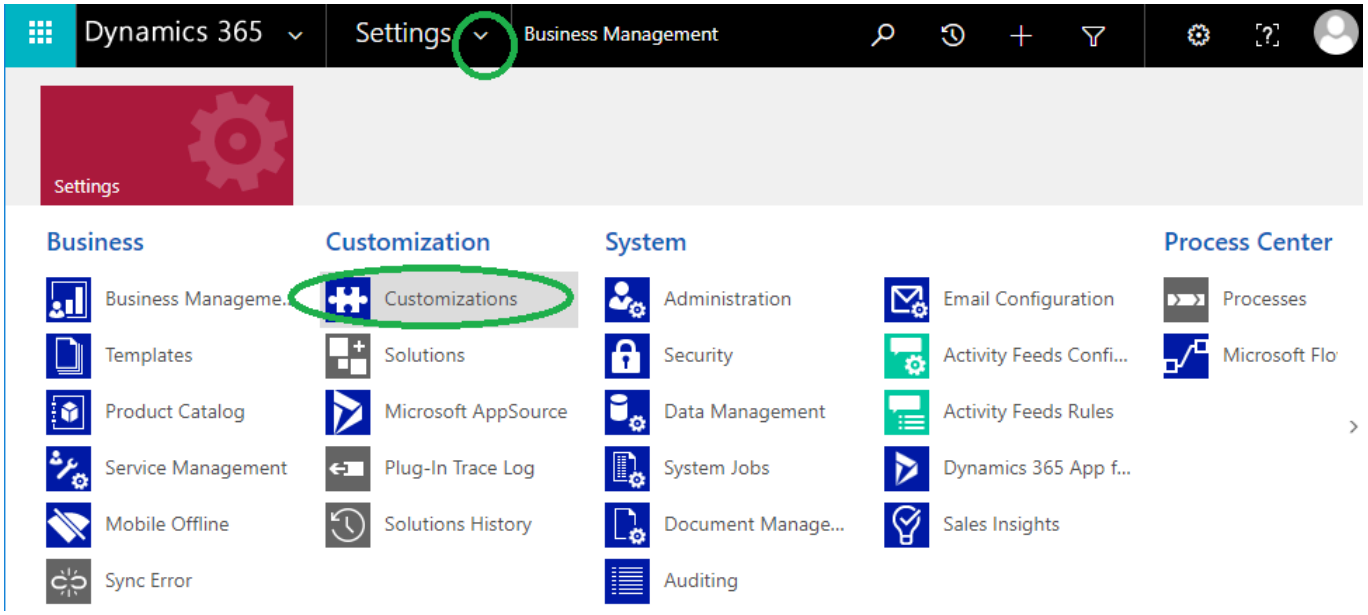


Figure: Customizations Settings

5. Click "Settings" icon located with "Customizations". It shows the following page.

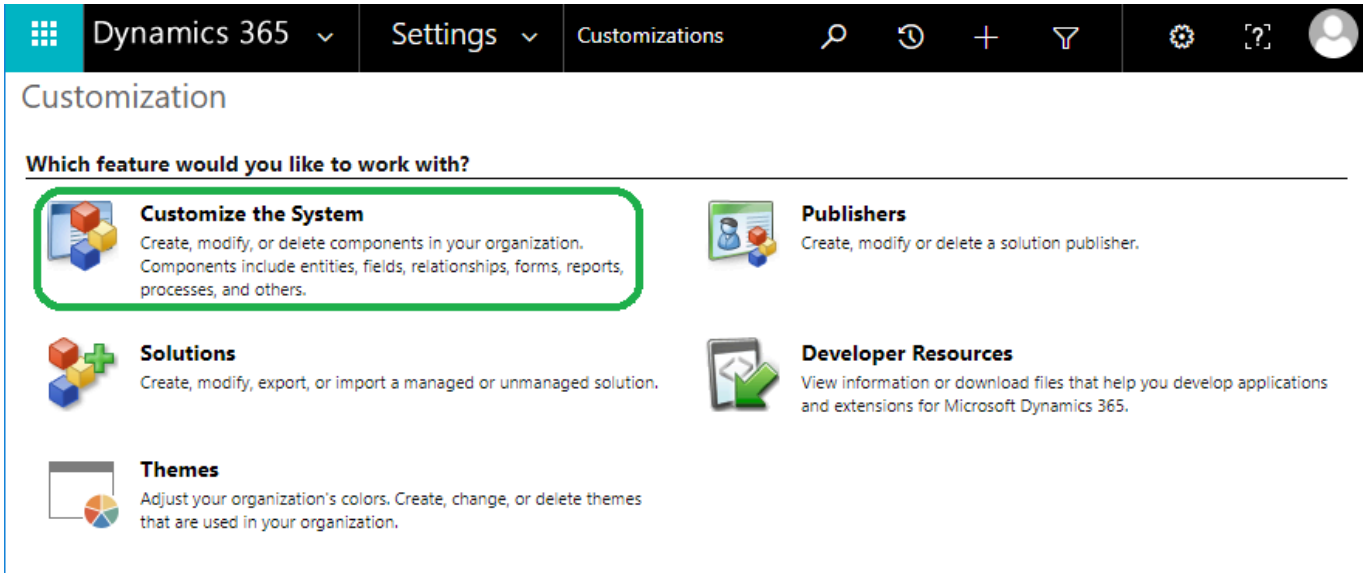


Figure: Customize the System Settings tab

6. Click "Customize the System" tab located on the top of the page. It shows the following page of PowerApps, which makes you allow and integrate all fields to your Ameyo account.

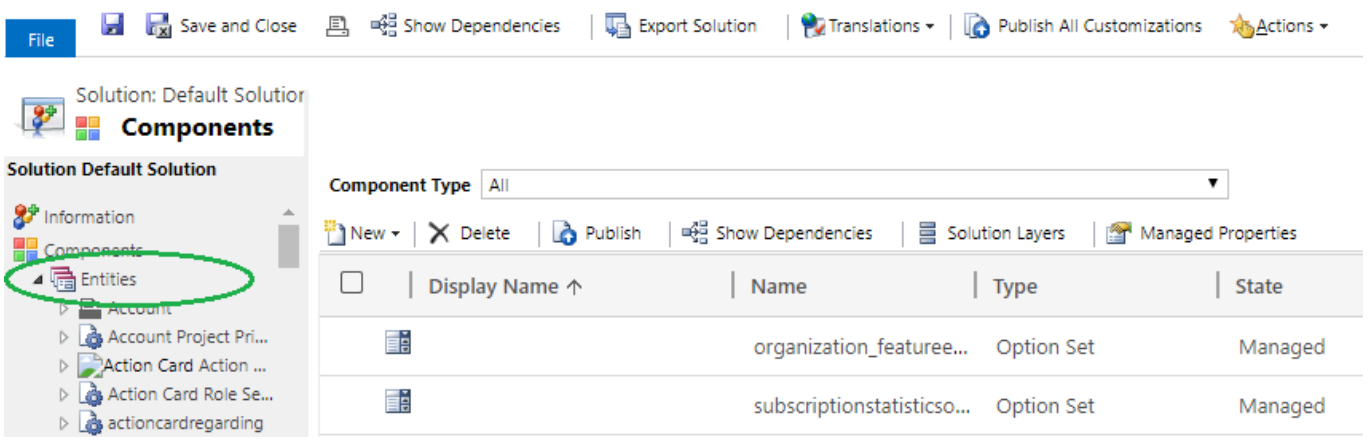


Figure: Entities option of Customization tab

7. Select the "Entities" link to expand its tree. It shows the list of all features.

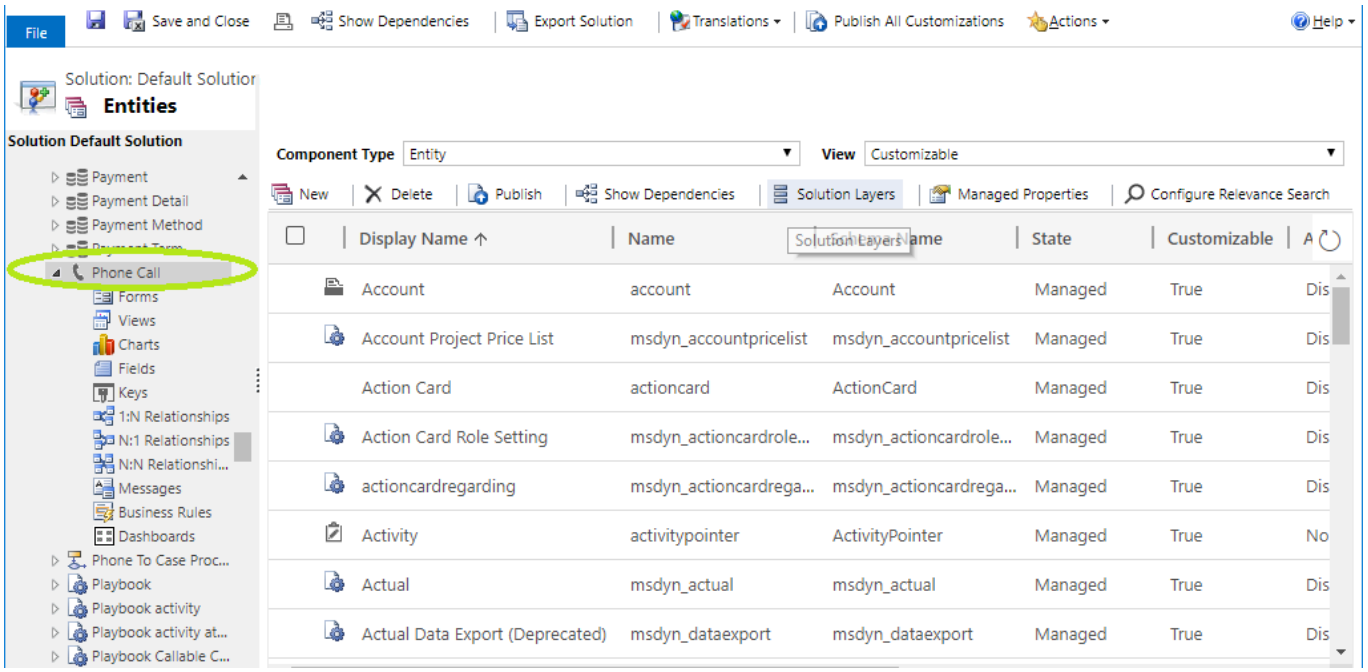


Figure: Phone Call List

8. Scroll down to find "Phone Call". Click it to expand it further.
9. Click "Fields" option to access the following page.

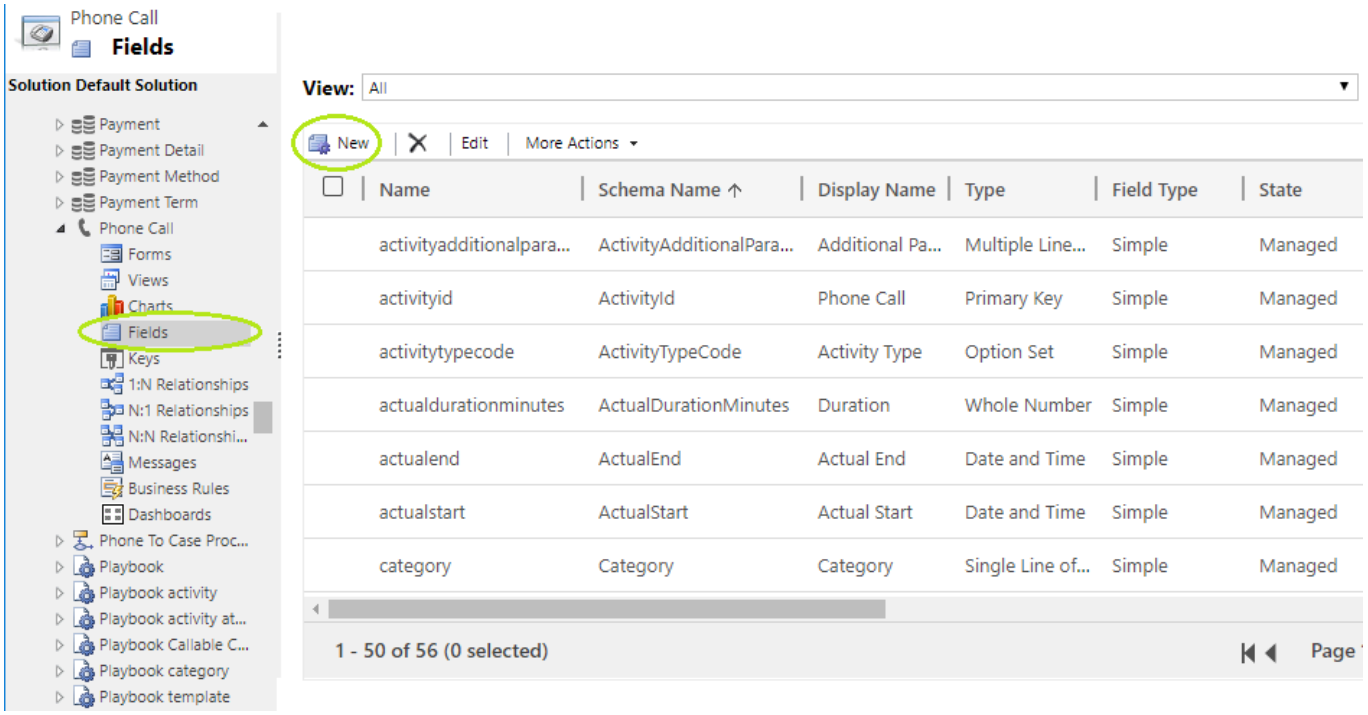


Figure: Fields option

10. Now, select "New" button located on the top.

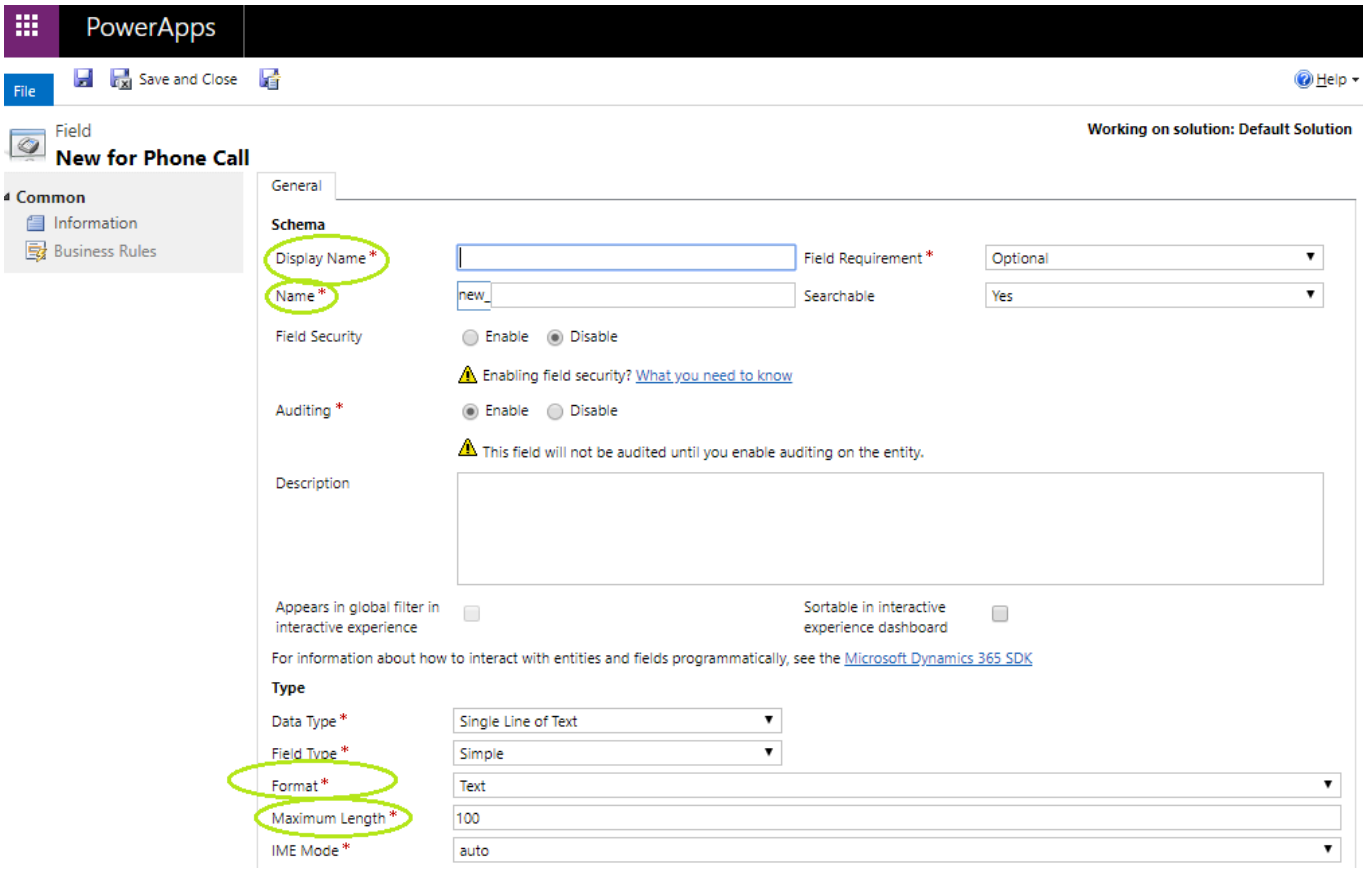


Figure: Phone Call Fields

11. Create the new Phone Call Fields that helps CIF to create the compatible fields for Ameyo. You have to provide the inputs in the following fields.
    - Display Name
    - Name
    - Format
    - Maximum Length
12. Create the following fields with their columns.
    1. **Recording Link Field:** It allows the Ameyo to record the calls and store them in the Ameyo Server.
        - **Display Name:** Recording Link
        - **Name:** recordinglink
        - **Maximum Length:** 500
        - **Format:** URL

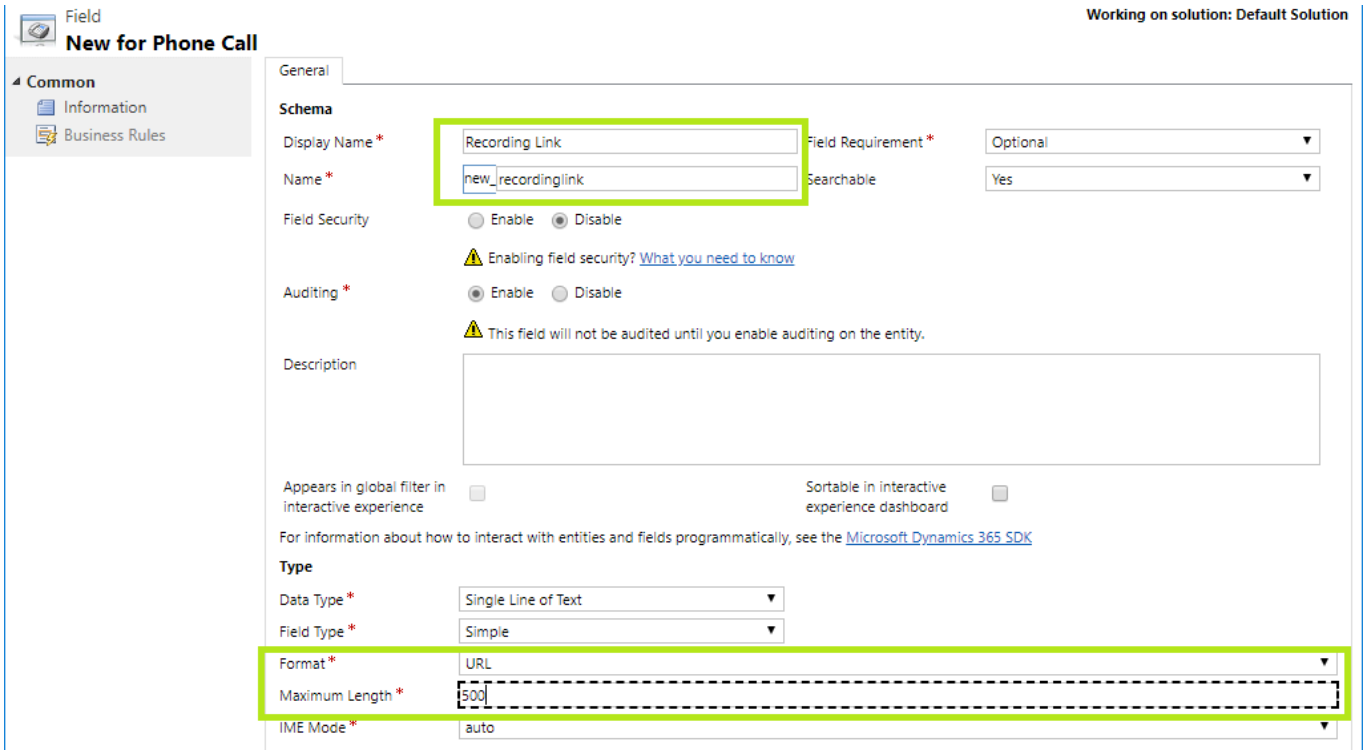


Figure: Recording Link Field

2. **Disposition Field:** It allows you to provide the Dispositions in the CIF as well.
    - **Display Name:** Disposition
    - **Name:** disposition
    - **Length:** 100
    - **Format:** Text

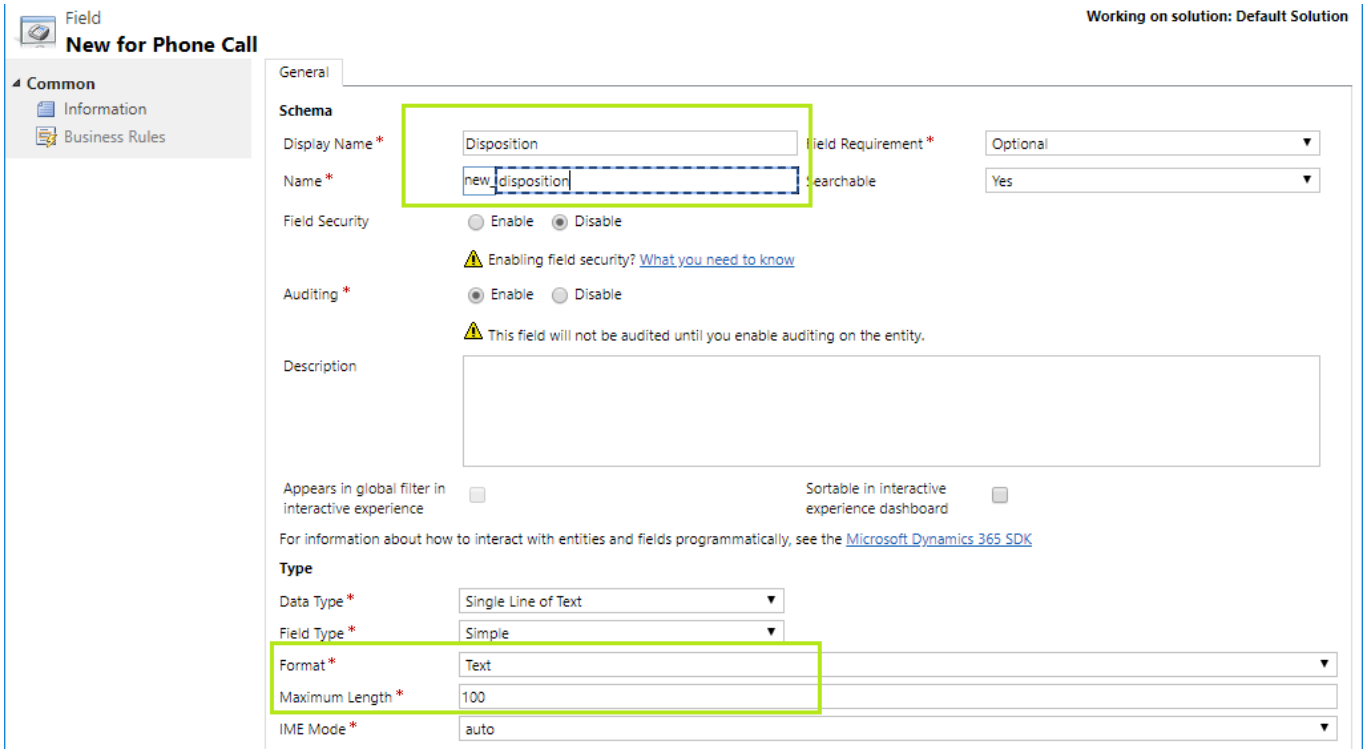


Figure: Disposition Field

3. **Sub Disposition Field:** It allows you to provide the sub dispositions to the call.
    - **Display Name:** Sub Disposition
    - **Name:** subdisposition
    - **Length:** 100
    - **Format:** Text

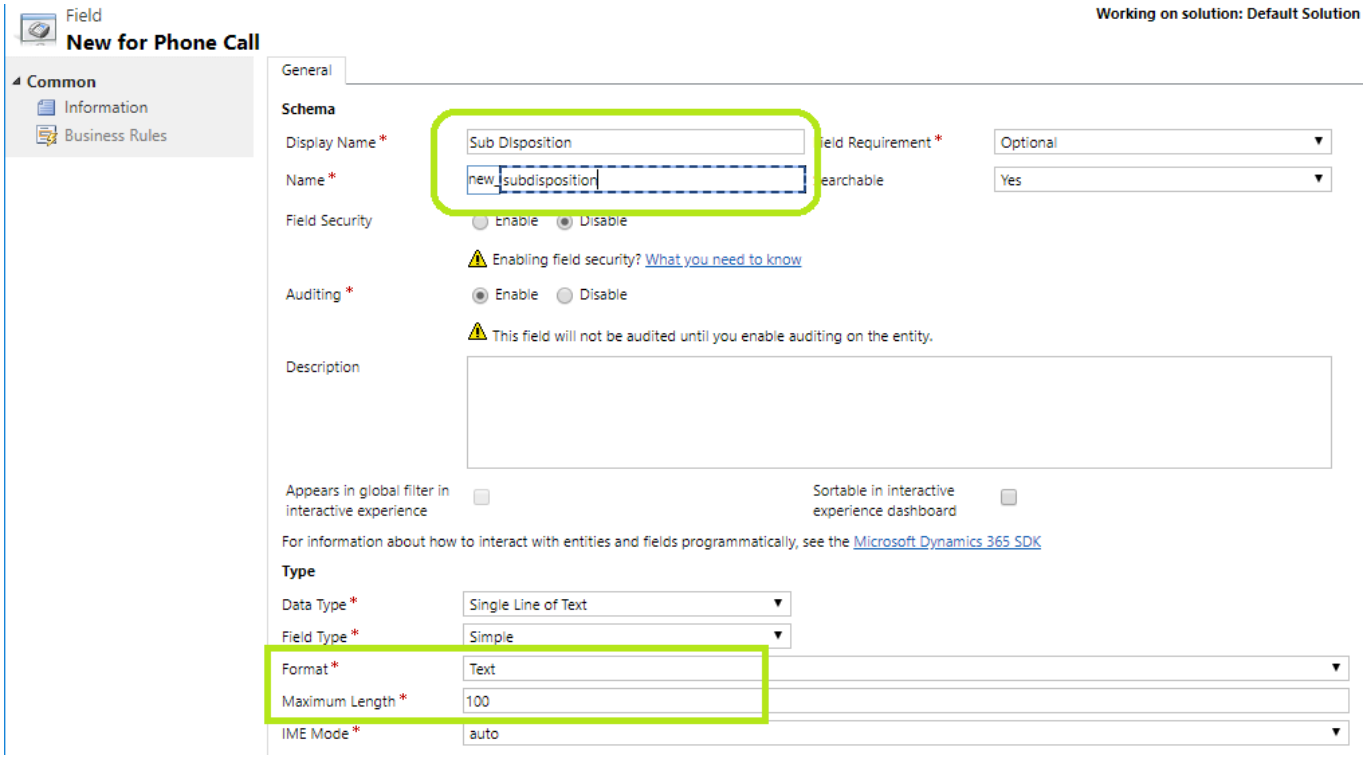


Figure: Sub Disposition Field

4. **Association Field:**
    - **Display Name:** Association
    - **Name:** association
    - **Length:** 100
    - **Format:** Text

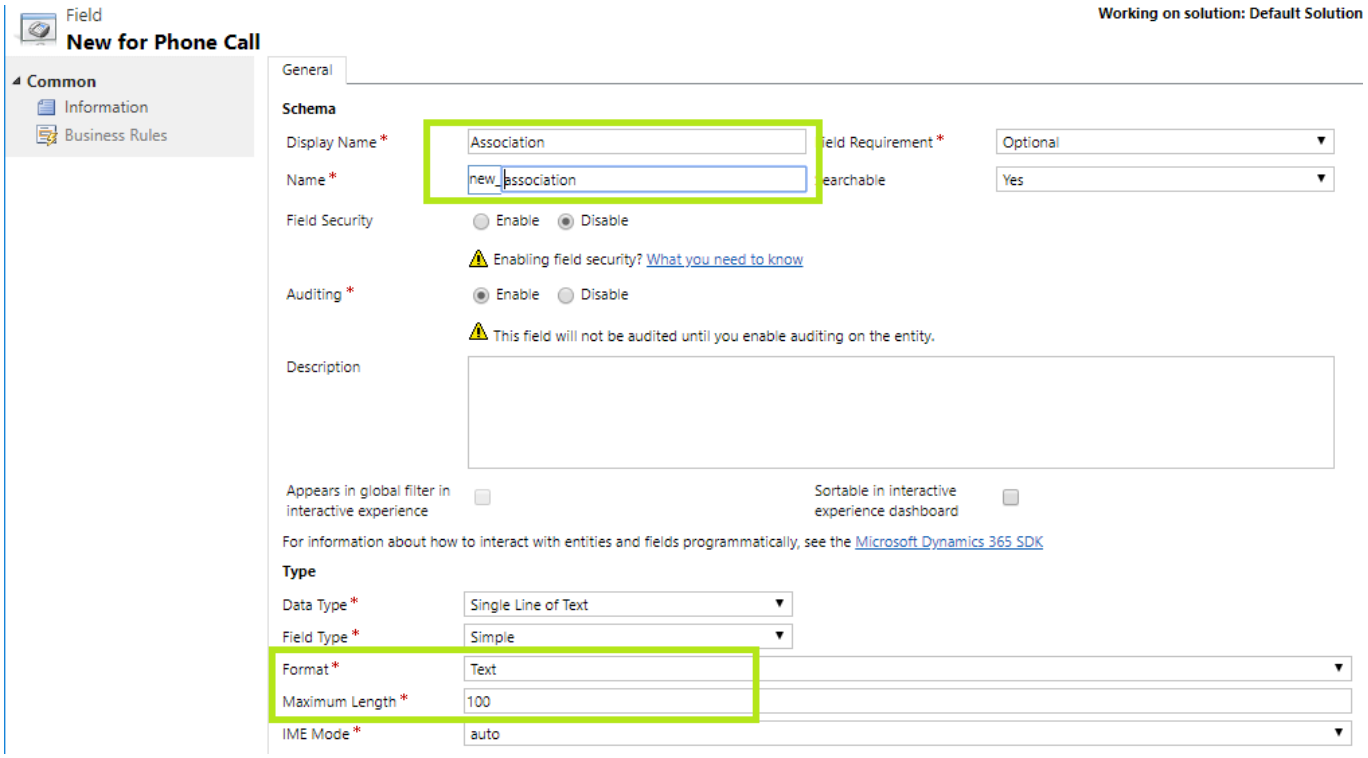


Figure: Association Field

5. **Agent Field:** It allows the CIF to recognize the agent with the help of ameyo.
    - **Display Name:** Agent
    - **Name:** agent
    - **Length:** 100
    - **Format:** Text

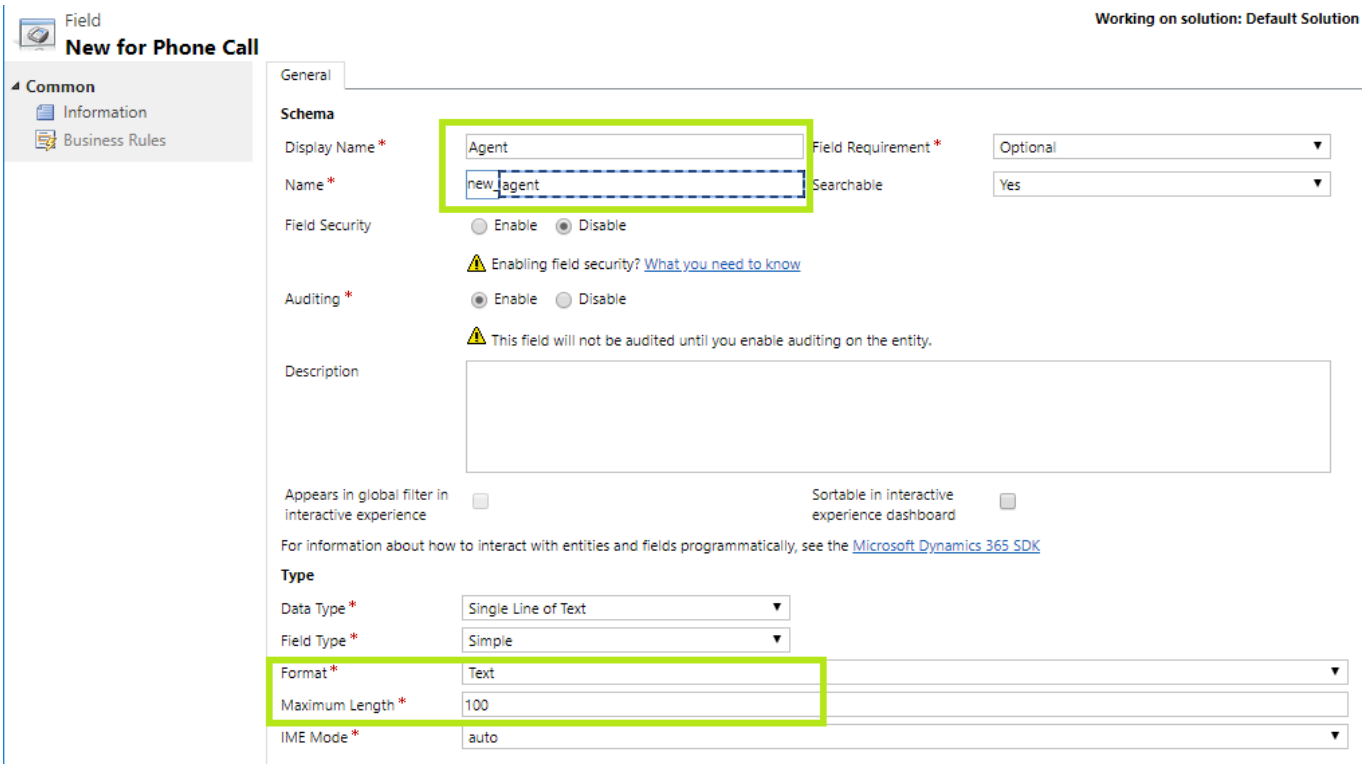


Figure: Agent Field

> If you want to add more fields that are not present in the above steps, then contact the Services Team of Ameyo.

13. After creating all above fields, close the page and return to the previous page. Now, there is a need to assign these fields to the phone call entity.
14. Click "Forms" option and click "Fields".
15. All options of "Forms" options are displayed.

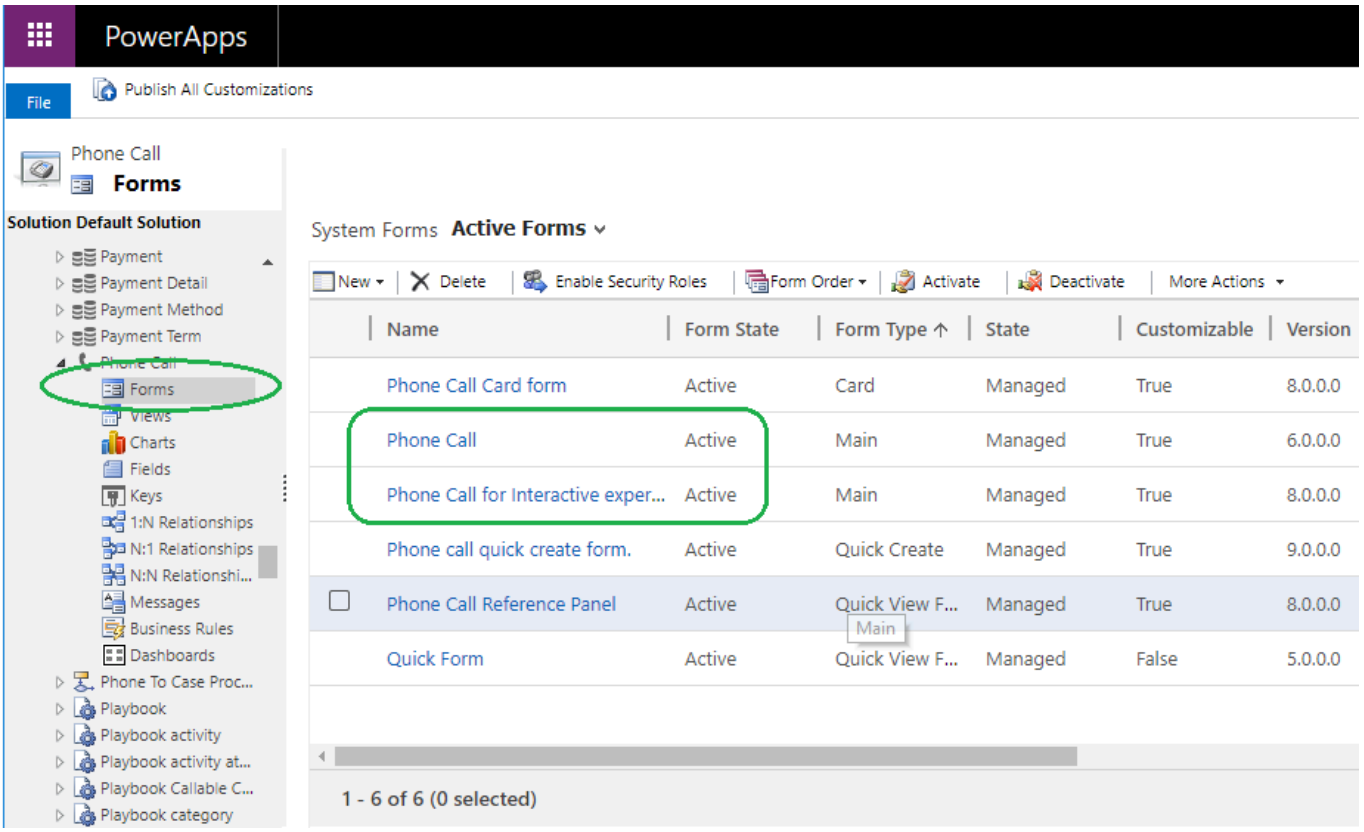


Figure: Forms option in Entity

16. Click "Phone Call" option in the right panel. It shows the options in a navigation pane located on the right side., which contains the fields created in the previous step. It helps CIF to use all required services offered by Ameyo to inherit.

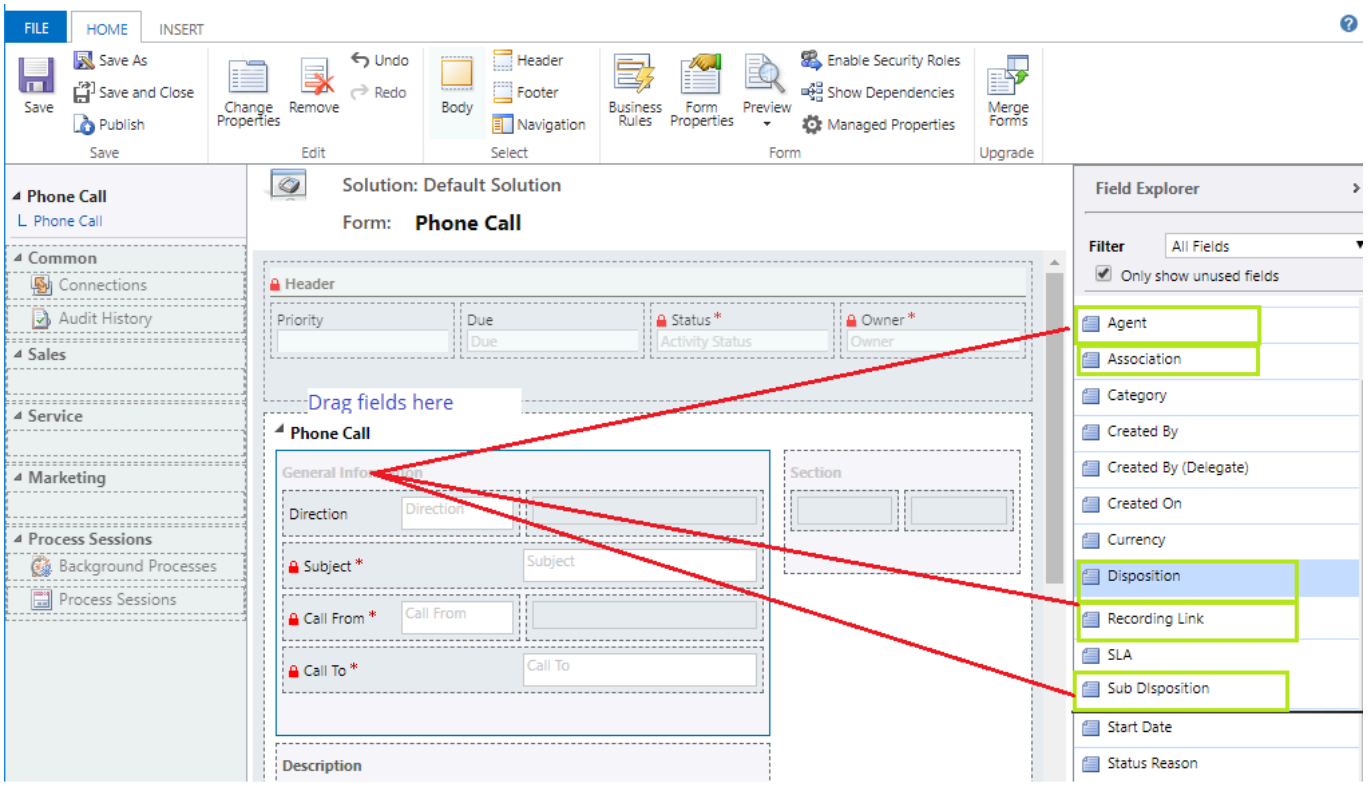


Figure: Phone Call Entity Page

17. All created fields are located in this right panel. Drag them to the section named "Phone Call".

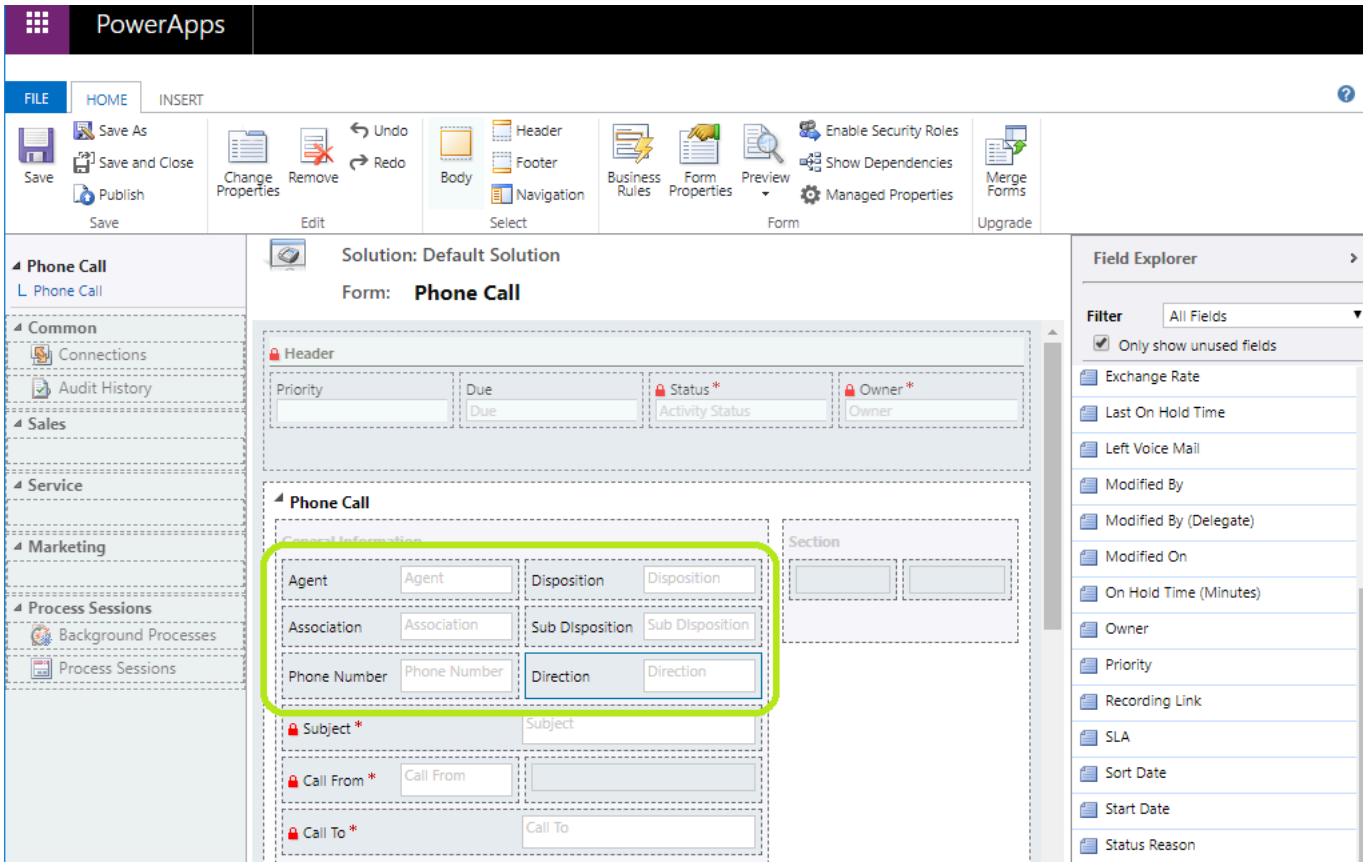


Figure: Fields dragged to Main Menu

18. Click "Publish" button located on the top to save and publish the changes. It shows a confirmation message. Click "OK" to save the changes.

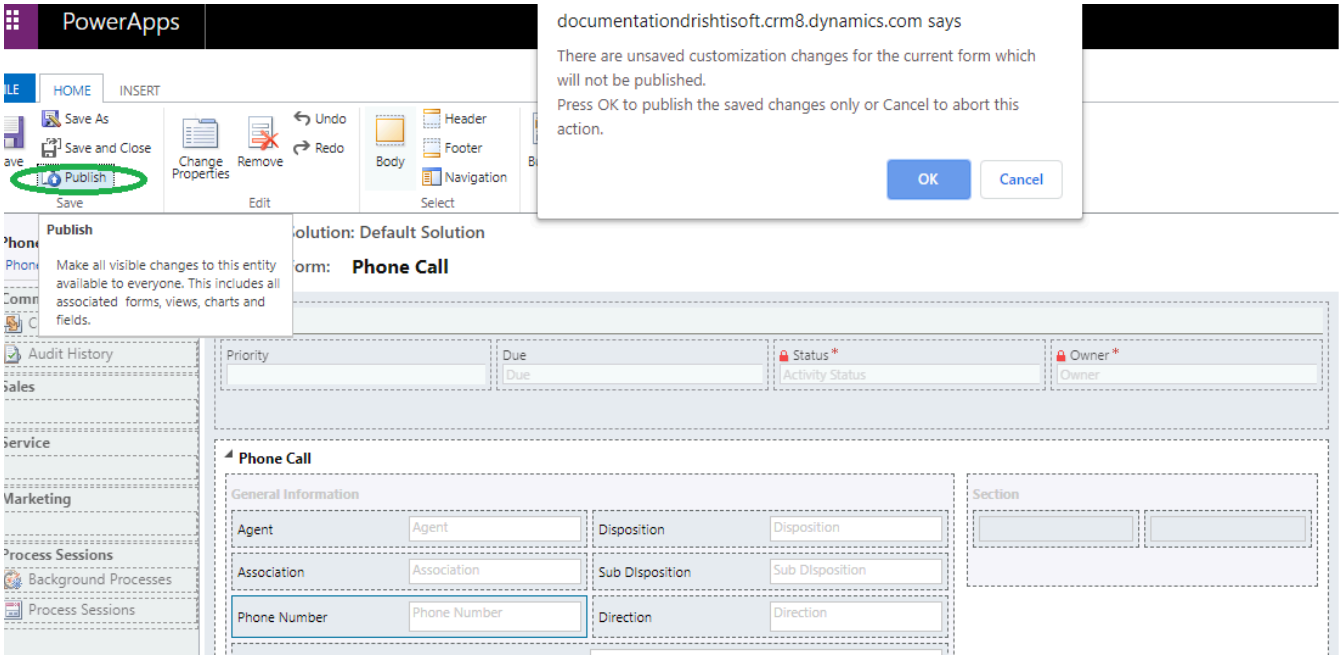


Figure: Save and Publish the Controls

19. Now, go back to the entities page and open **"Phone Call for Interactive experience"**. It shows the following page.

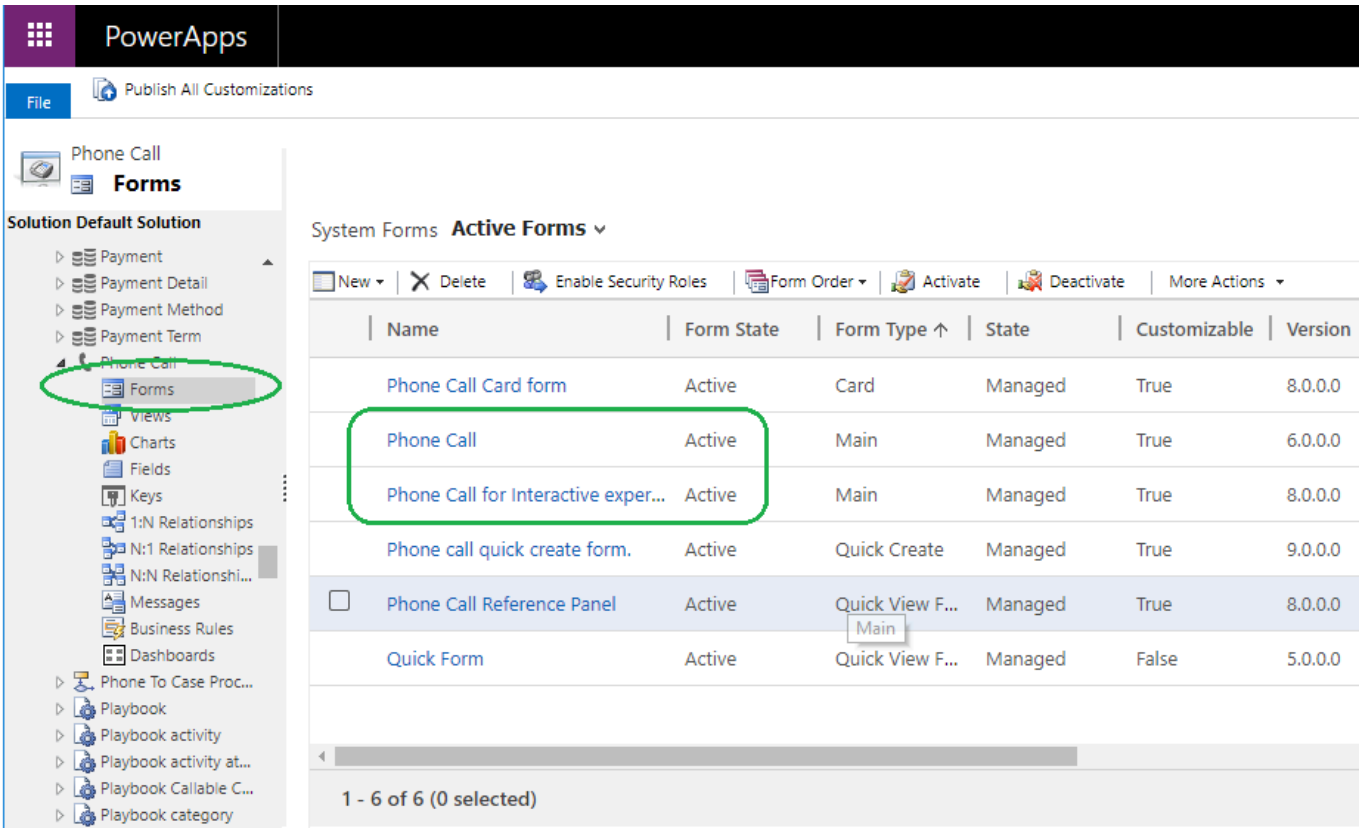


Figure: Phone Call for Interactive Experience

20. Perform the same steps, which you have performed earlier in the Phone call menu. Drag the fields to the Phone call menu and assign the control options as done in previous steps.

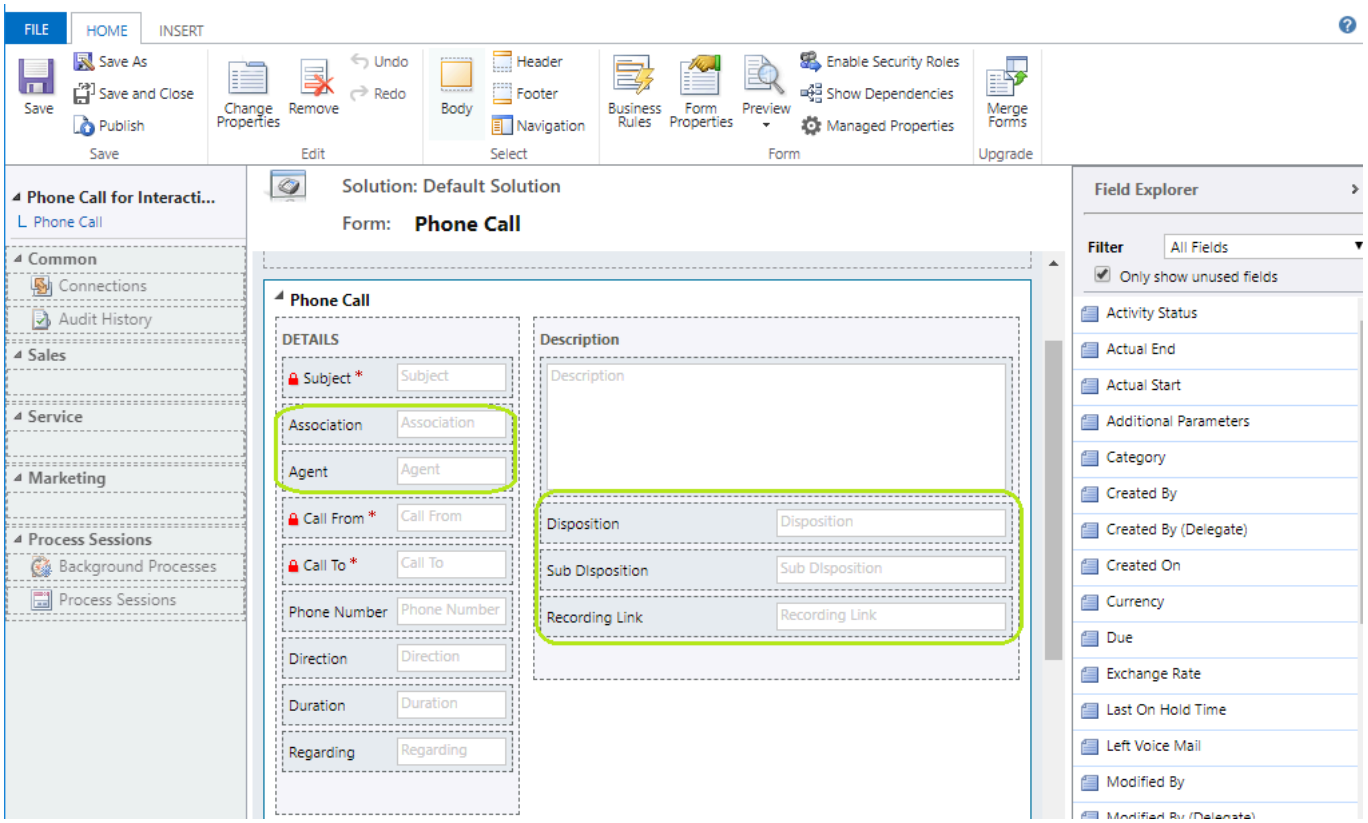


Figure: Phone call for an interactive experience

21. After completing all changes, click **Publish** button to save the changes.

With the above steps, all configurations for Microsoft Dynamics account have been completed.

14.6. Salesforce Lightning CRM Integration with Ameyo

Overview:

This document provides instructions for integrating the Ameyo toolbar with the Salesforce Lightning CRM. The integration embeds Ameyo's calling functionalities directly into the Salesforce interface, enabling agents to handle calls and customer data within a single, unified platform.

Key Benefits:

- **CTI Pop-up:** For calls from unregistered numbers, the integration allows for the creation of new objects and the association of objects with the call.
- **Caller Identification:** Displays the customer's name in the telephony panel for calls from registered numbers.
- **Telephony Actions:** Provides essential call-handling features such as "Dispose and Dial" and "Callback Disposition".
- **Advanced Call Management:** Supports contextual call transfers and indicates user roles during call transfers and conferences.
- **Configurable Dispositions:** Allows for the use of a two-level disposition system for callbacks, which is configurable.

Functionality:

- **Ameyo Package Installation:** The integration is deployed by installing a dedicated Ameyo package into the Salesforce account.
- **Call Center Adapter:** It utilizes the Salesforce Call Center Adapter to enable Ameyo to function as a contact center solution within the CRM.
- **Embedded SoftPhone:** Integrates a softphone layout to provide agents with access to telephony features directly within the Salesforce UI.
- **Single Sign-On (SSO):** Supports SSO, allowing users to log in to both systems with a single set of credentials for a seamless workflow.

Prerequisites:

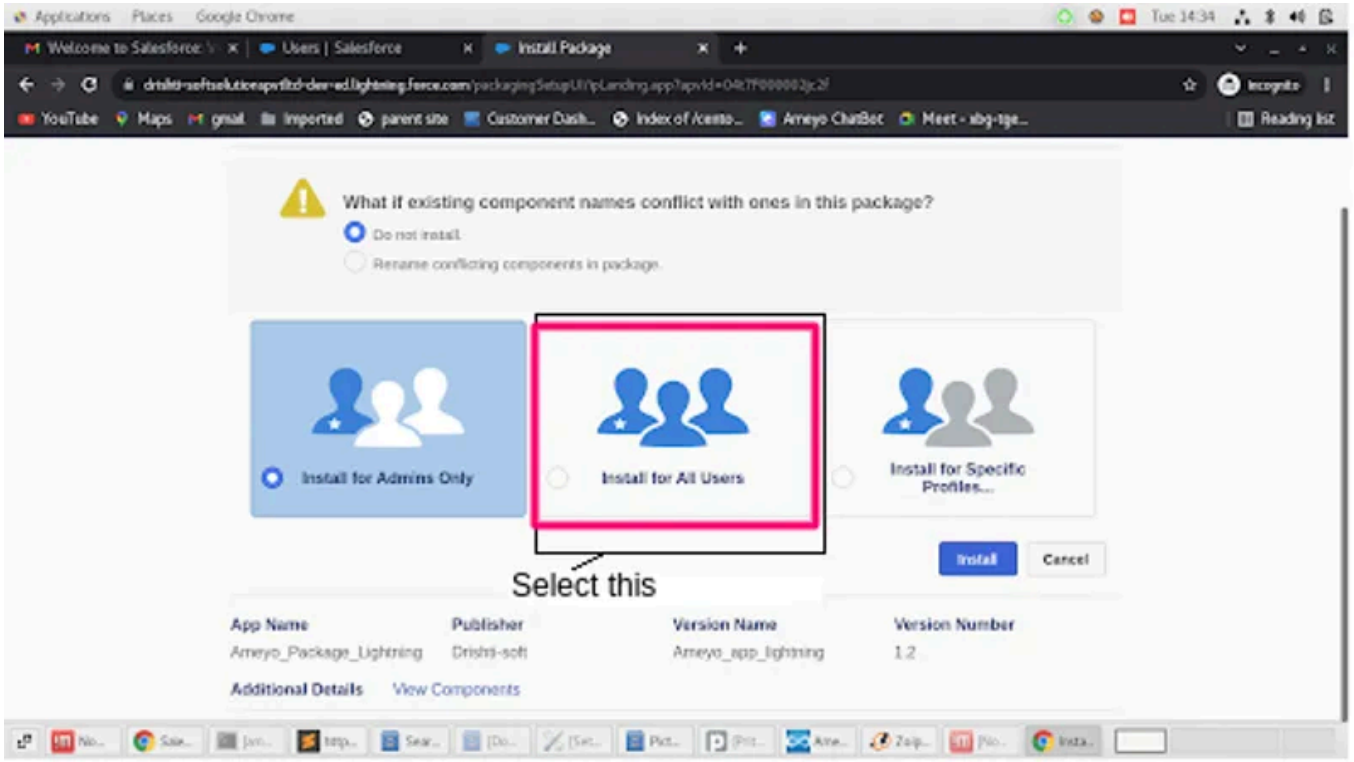
- An administrator account on Salesforce Lightning registered with an organizational domain.
- The Ameyo application must be running in SSL mode.
- Administrator access to the Ameyo database and application server.

14.6.1. Salesforce CRM Configuration Guide

Usage Instructions:

Step 1: Create Salesforce Developer Account

- Create a developer account on https://developer.salesforce.com/signup

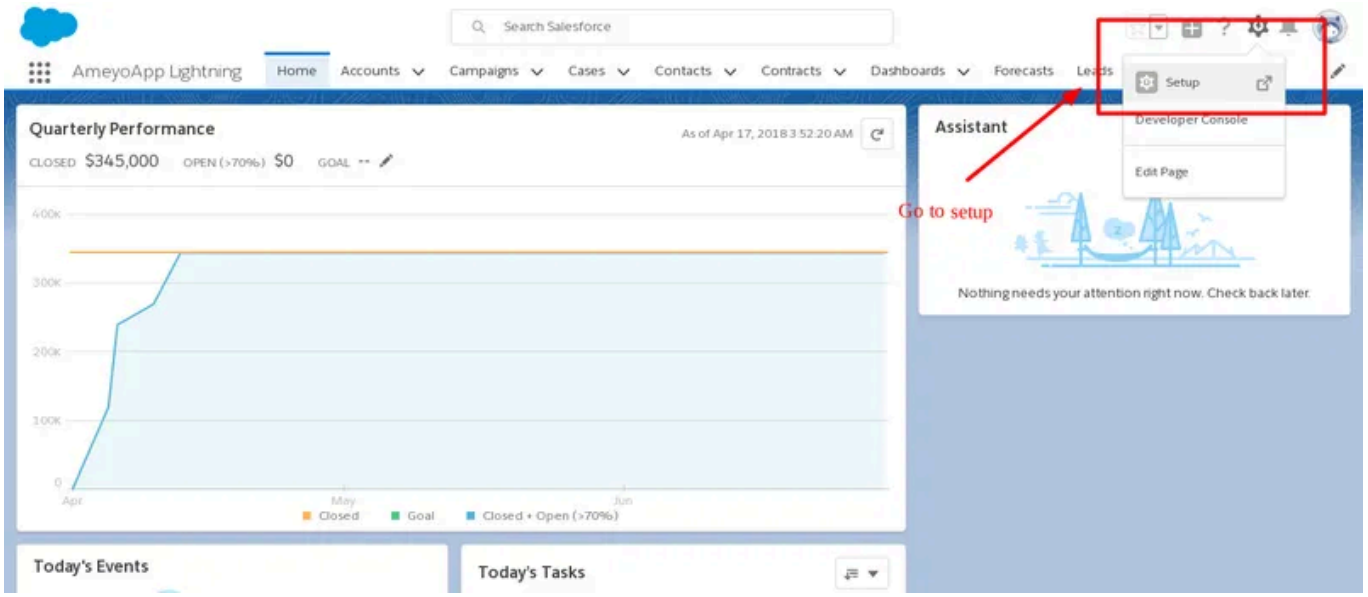


- Complete phone and email verification.
- Log in to your new Salesforce Developer account.

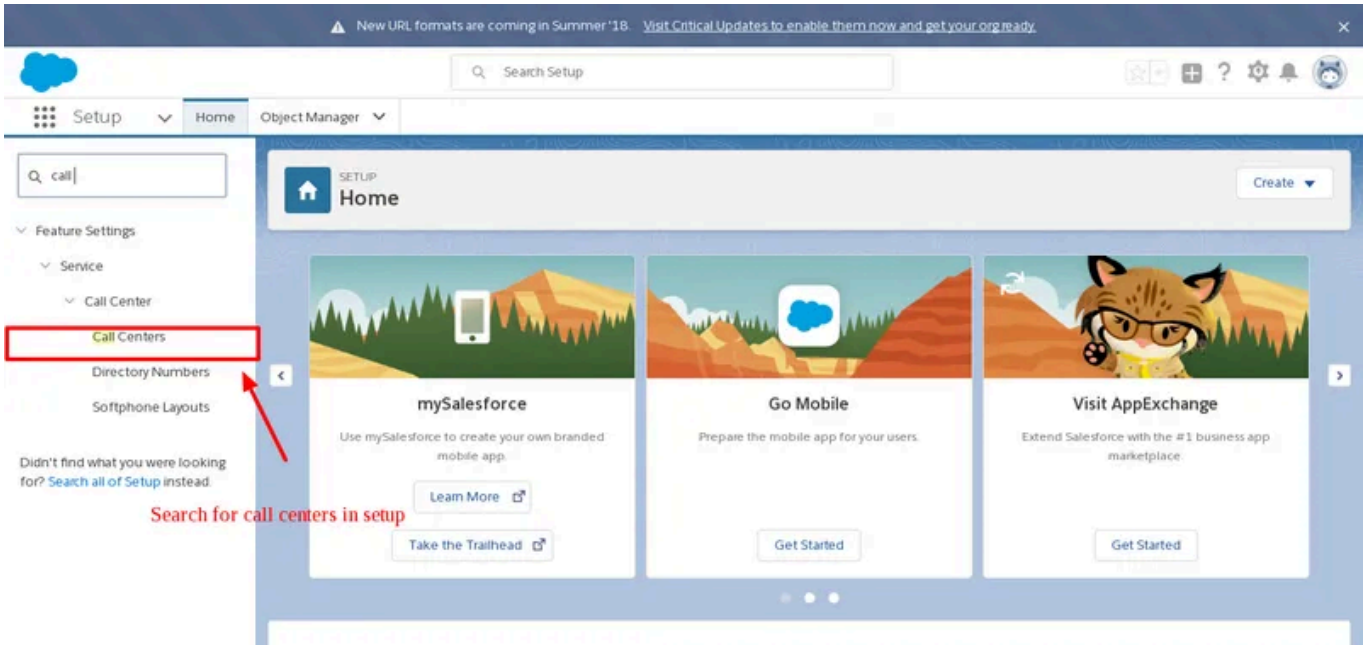
Step 2: Install the Ameyo integration package

- Import package: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t7F000002jc2f
- If the call center isn't created, manually import the attached XML (call-center-definition-file.xml).
- Click Install

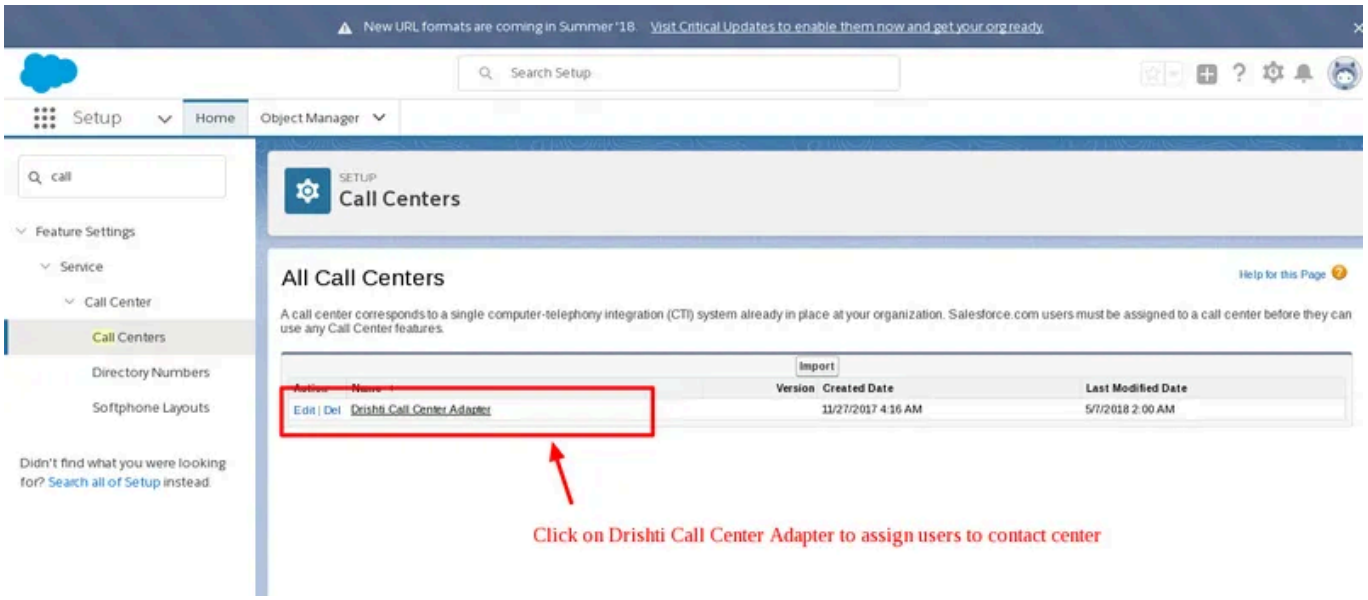
Step 3: Configuration for Ameyo Toolbar in Salesforce

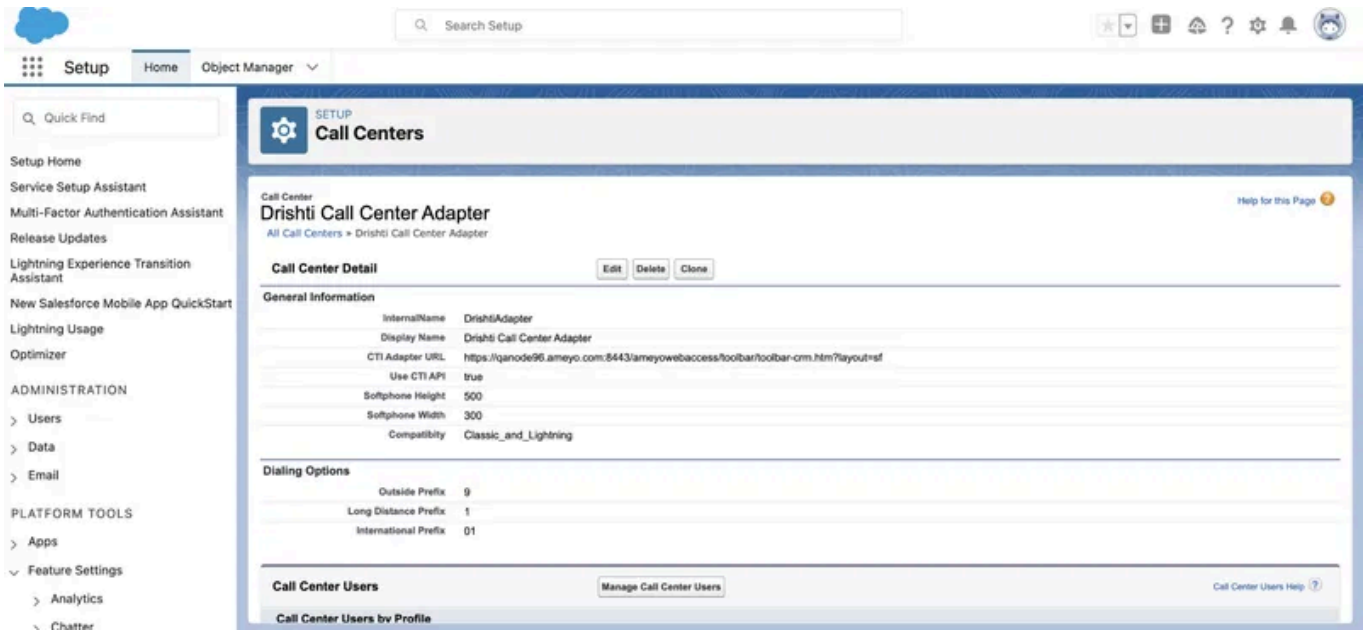


- Click on Search Box and search **Call Center**, and then select **Call Center** from The Left Panel.

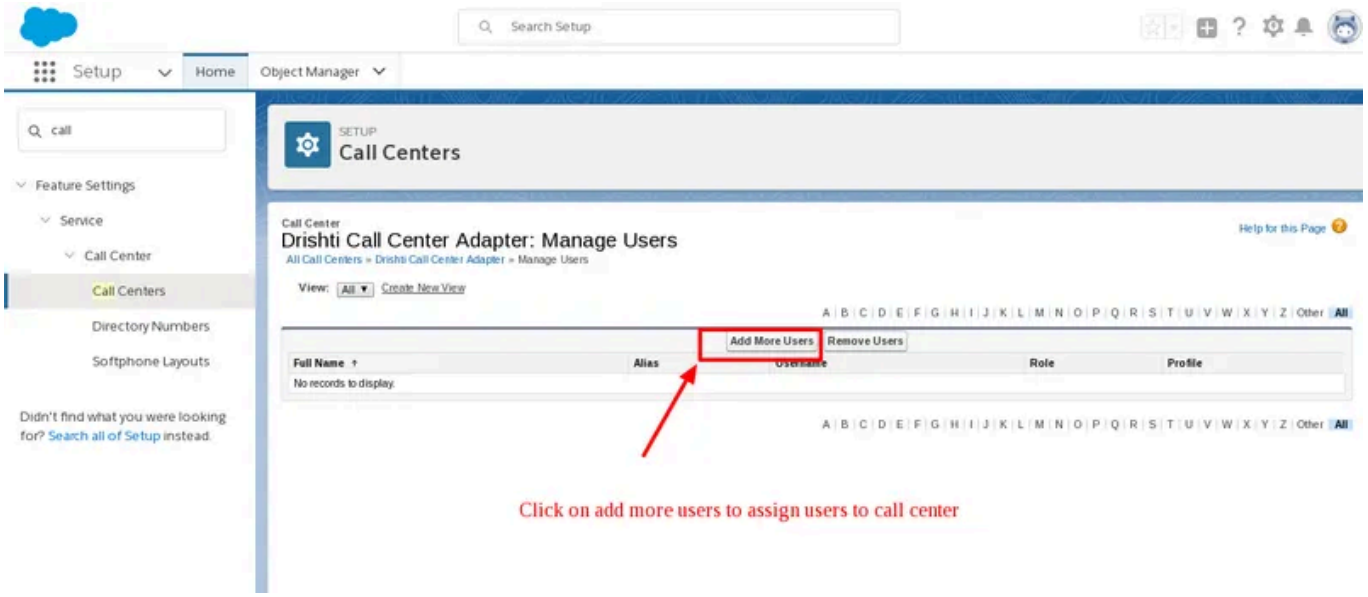


- Click on Edit Of **Drishti Call Center Adapter.**

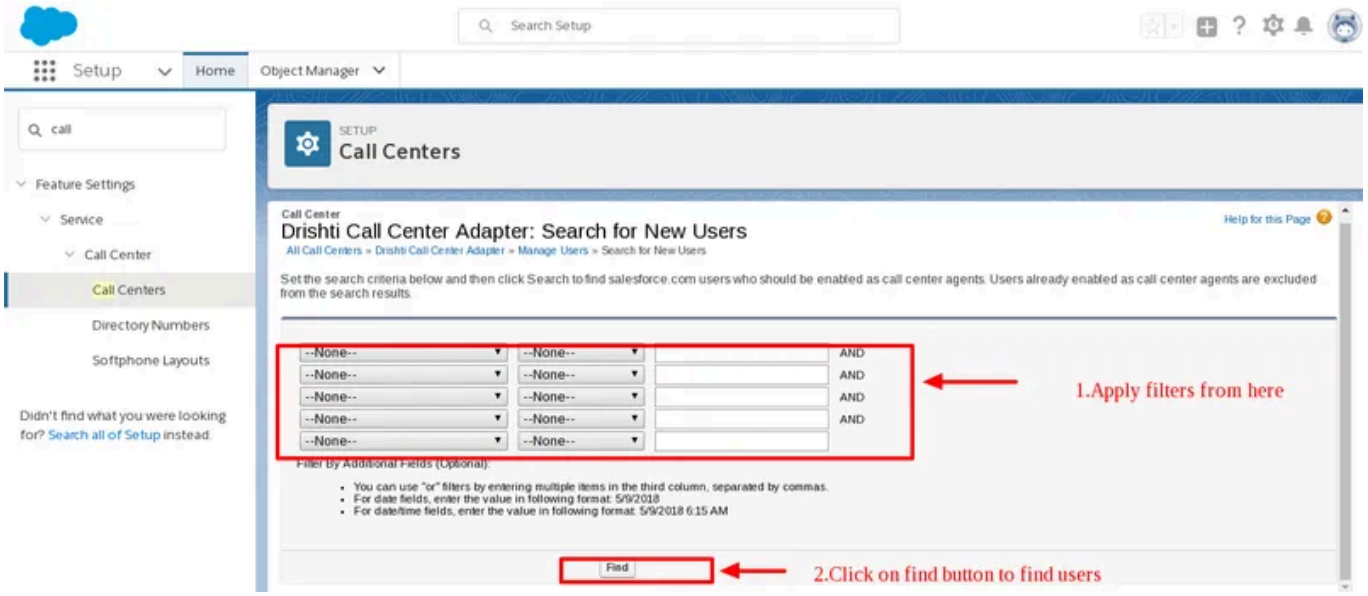




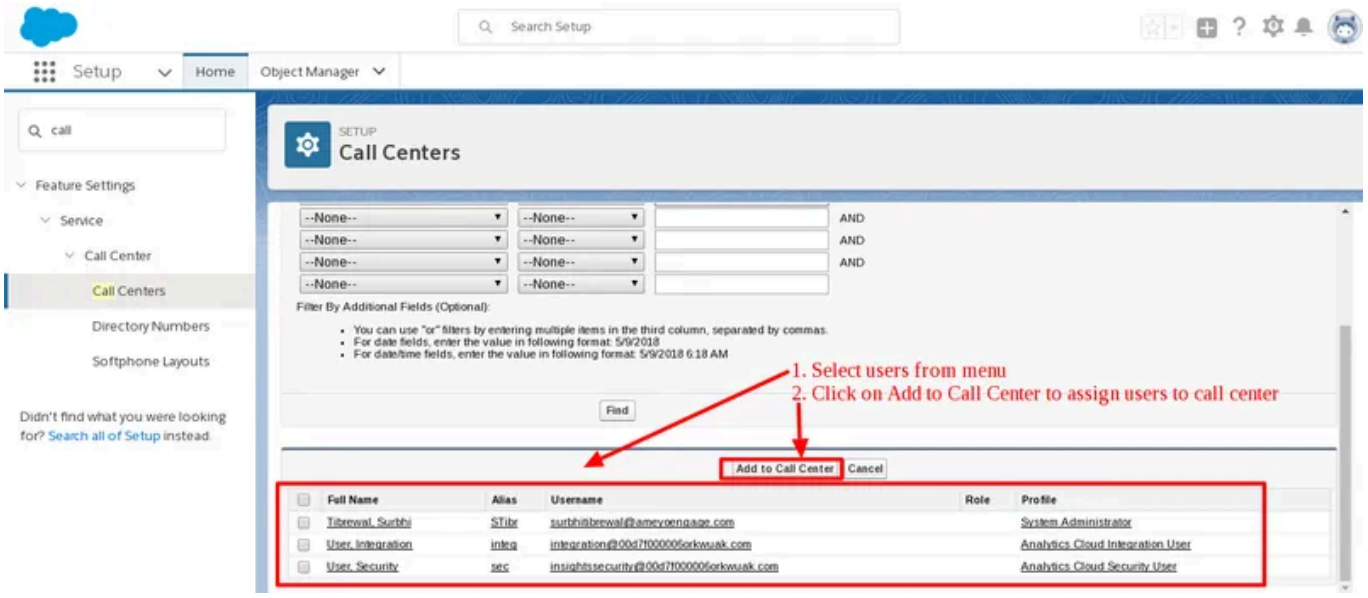
- Update **CTI Adapter URL**
  - [ ] (e.g., https://qanode96.ameyo.com:8443/ameyowebaccess/toolbar/toolbar-crm.htm?layout=sf).
  - [ ] Add users via **Manage Call Center Users**.
  - [ ] Click on **Add More Users**



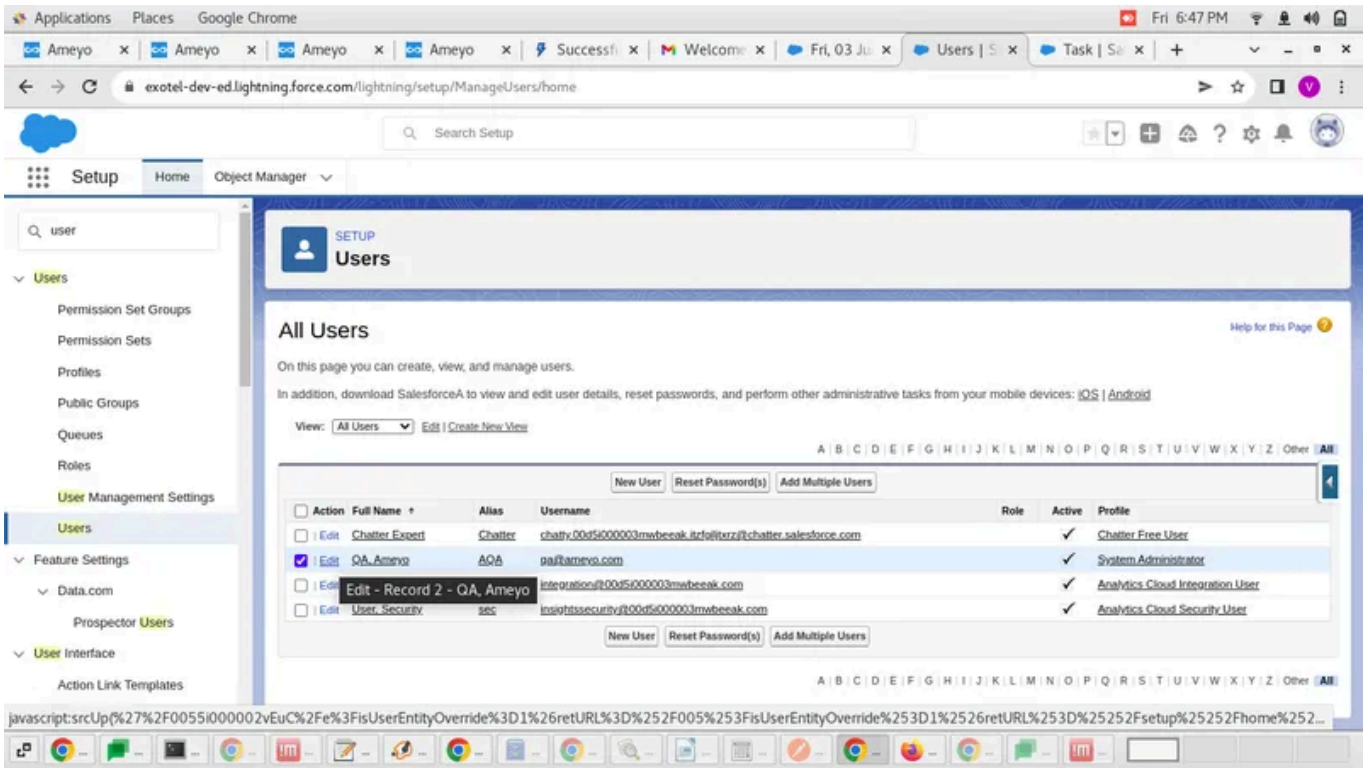
- Find already existing Users, if any to add into **Call Center.**



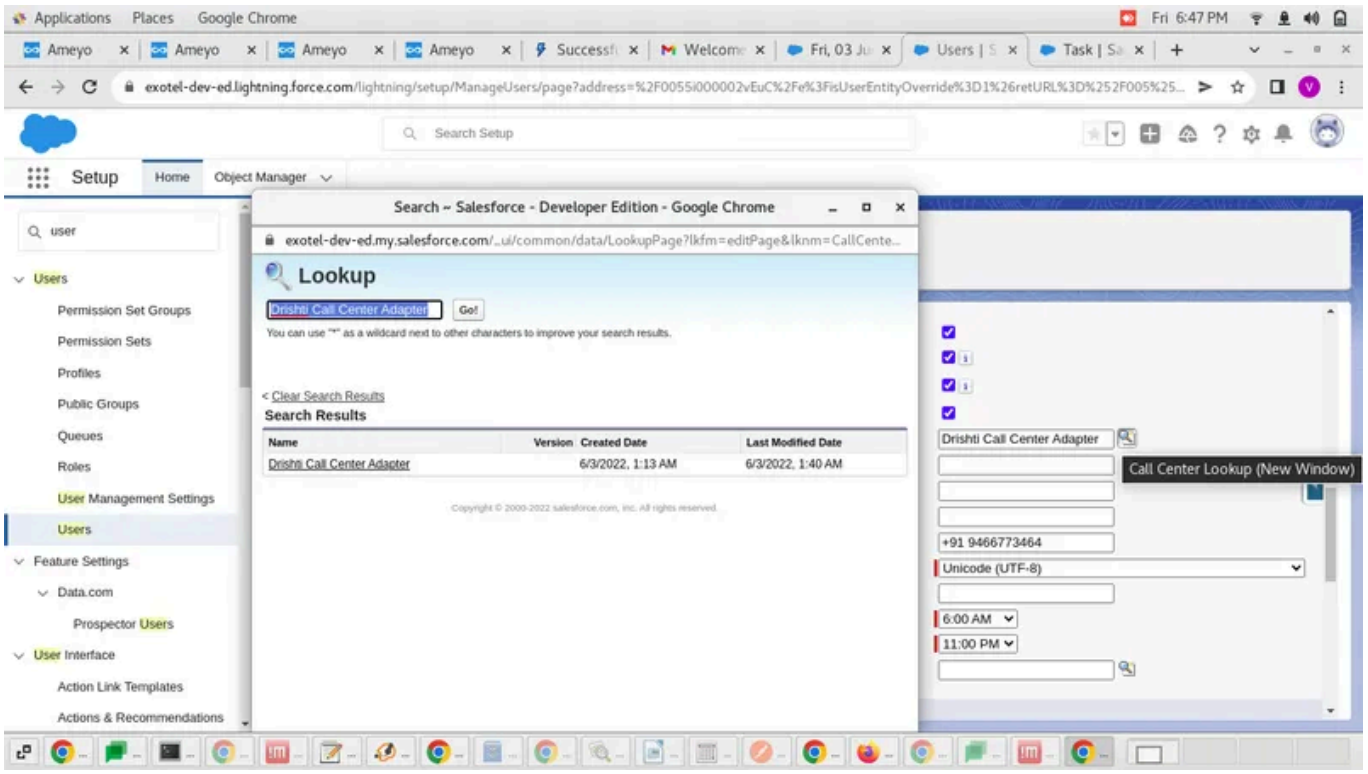
- Now Select The User From The List And Add To The Call Center.



If user is not visible in the list, then we need to assign call center in the user edit section. Search for users and edit the user by click on edit button.

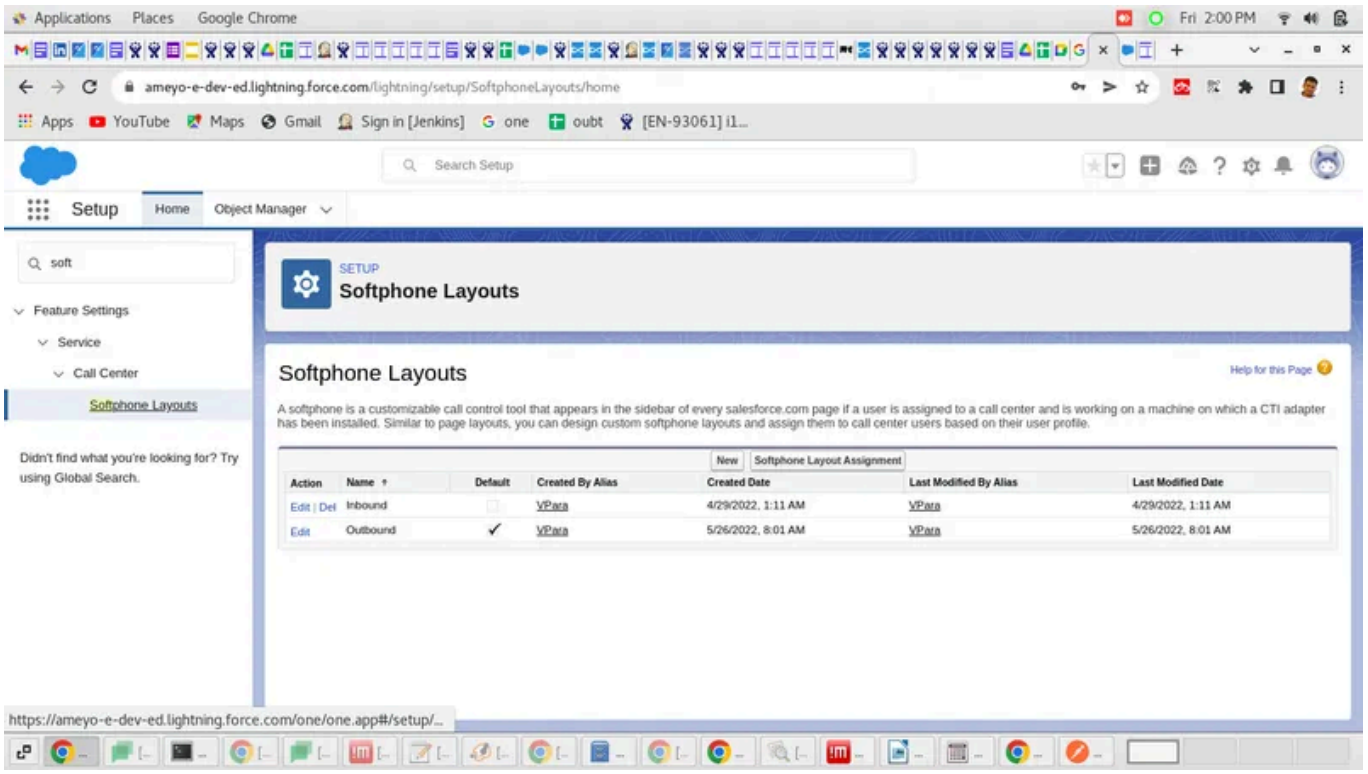


- Now scroll down and click on find icon in front of call center text box, a pop will open to show the call center. Just click on **GO**

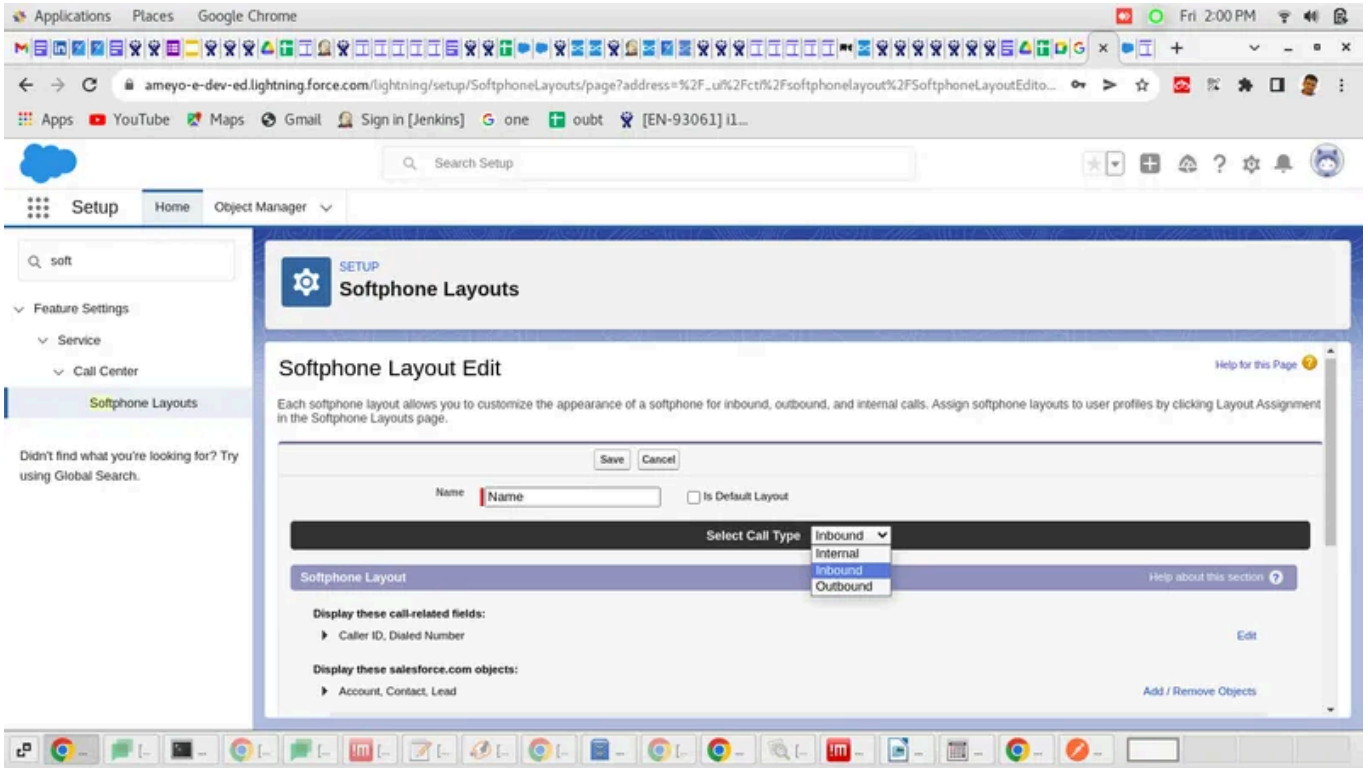


Step 4: SoftPhone Layout

- Now Create custom softphone layout for inbound and outbound so that activities and tasks will be opened.
- Search for the softphone and select the Softphone layouts >> Softphone Layout page will be open.

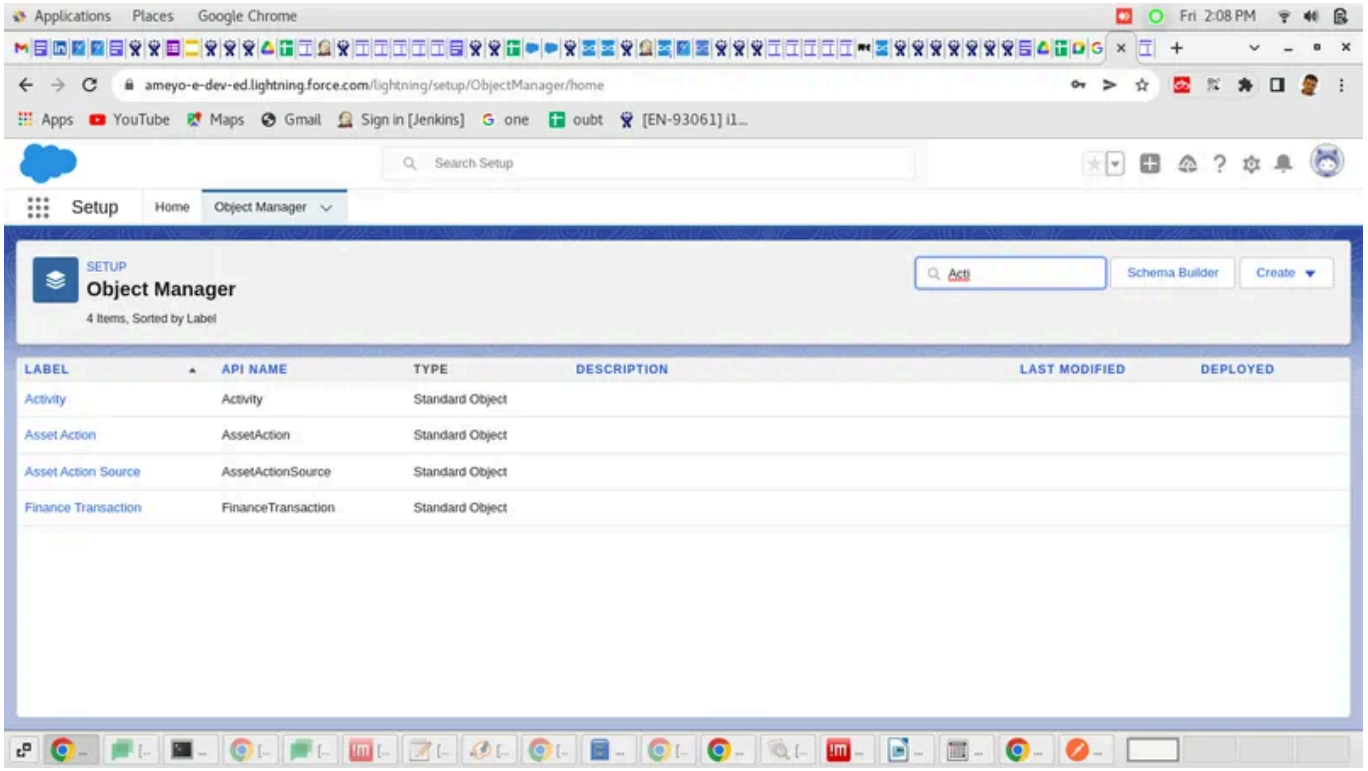


- Now click on new button and add the softphone layout for the inbound and then outbound (Make one default as per your requirement)

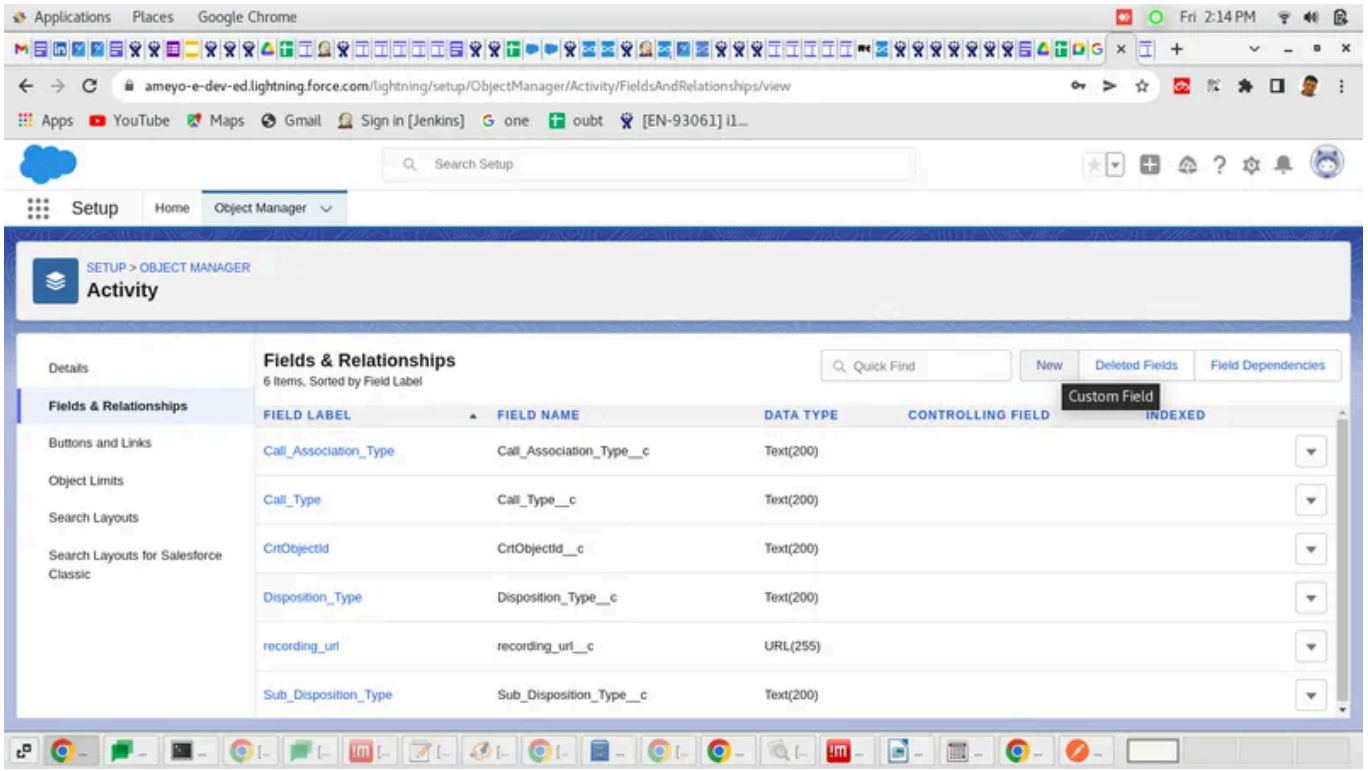


Add the custom fields under the activity:

- Now add the custom fields under the activity, which will further use if we are using server side dumping.
- Goto Object Manager Tab and search for the activity in quick find search box and select the Activity.



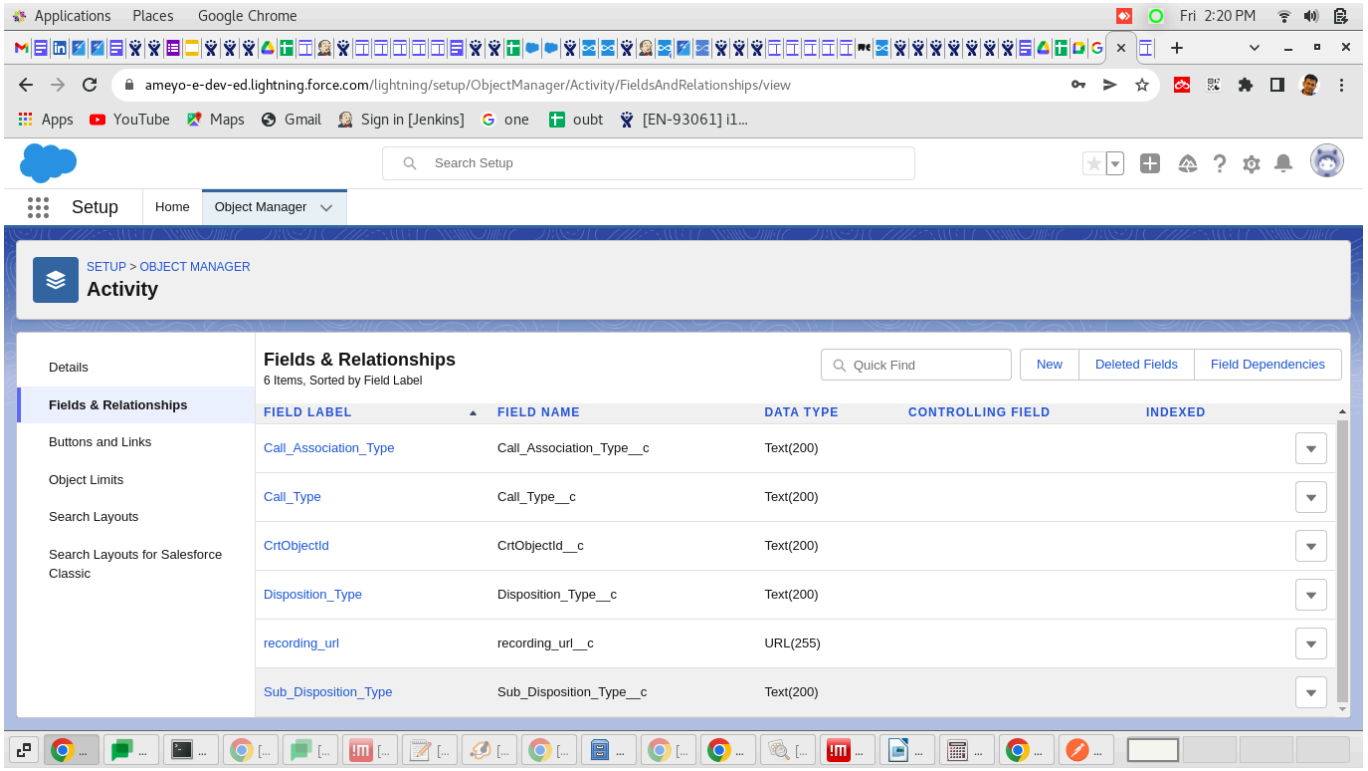
- Click on Activity page and then click on "Field & Relationship" from the left side panel and then click on "New Button" to add the new filed.



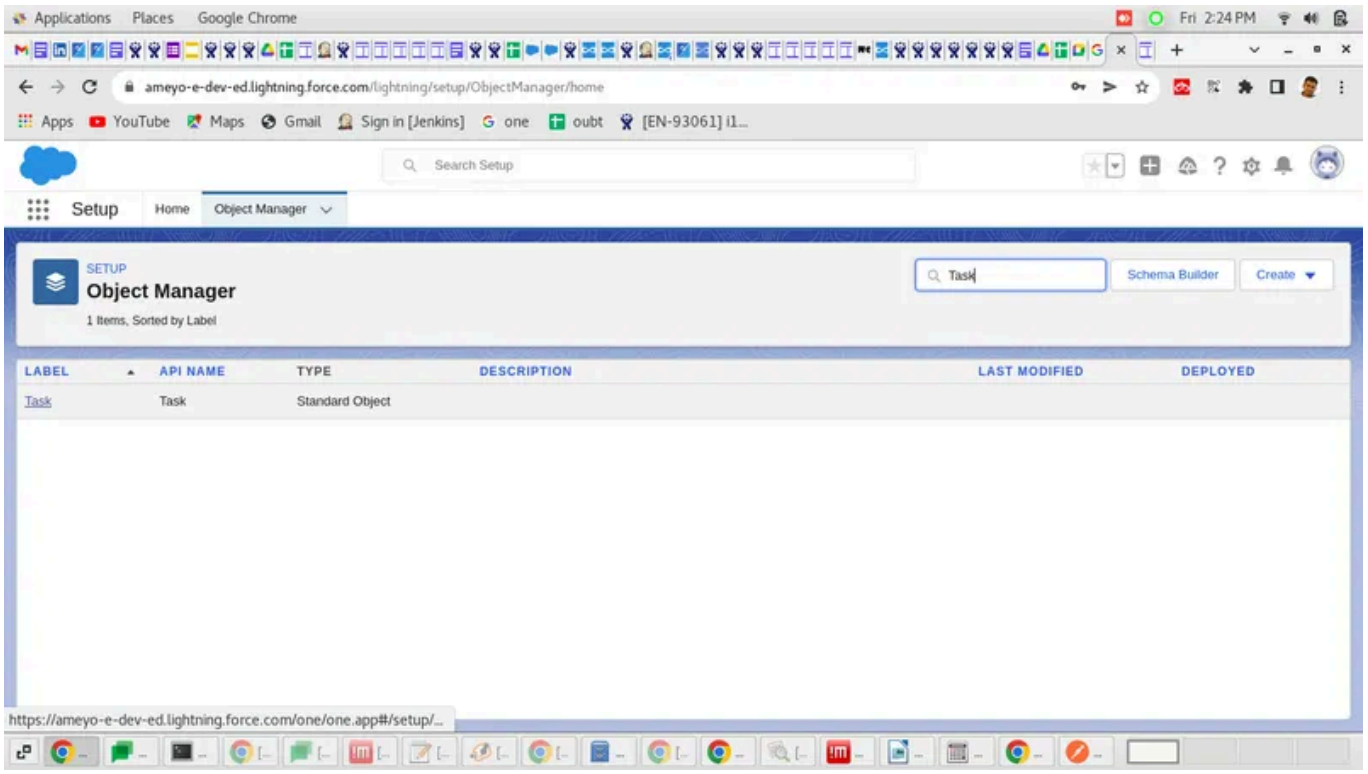
- Add the new button and then select type as "Text" > click on next then enter field with name = "Sub_Disposition_Type" and the length = 200 and again click on next and > Save . New field should be created and showing under activity.

> - Note -- For Server side dumping currently we need to manually add the Sub_Dispostion_Type filed for now.

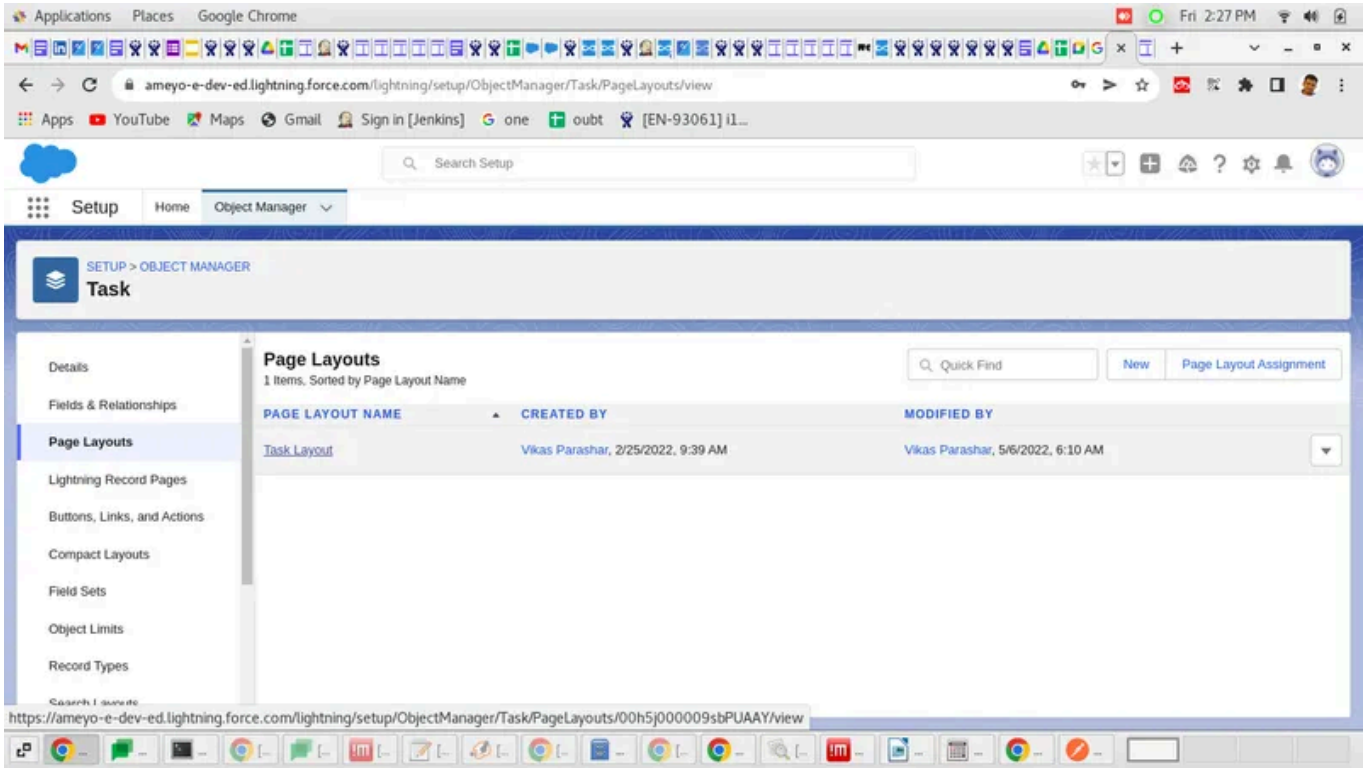
- Server side dumping will be showing in salesforce only after the completed status is showing in above table.



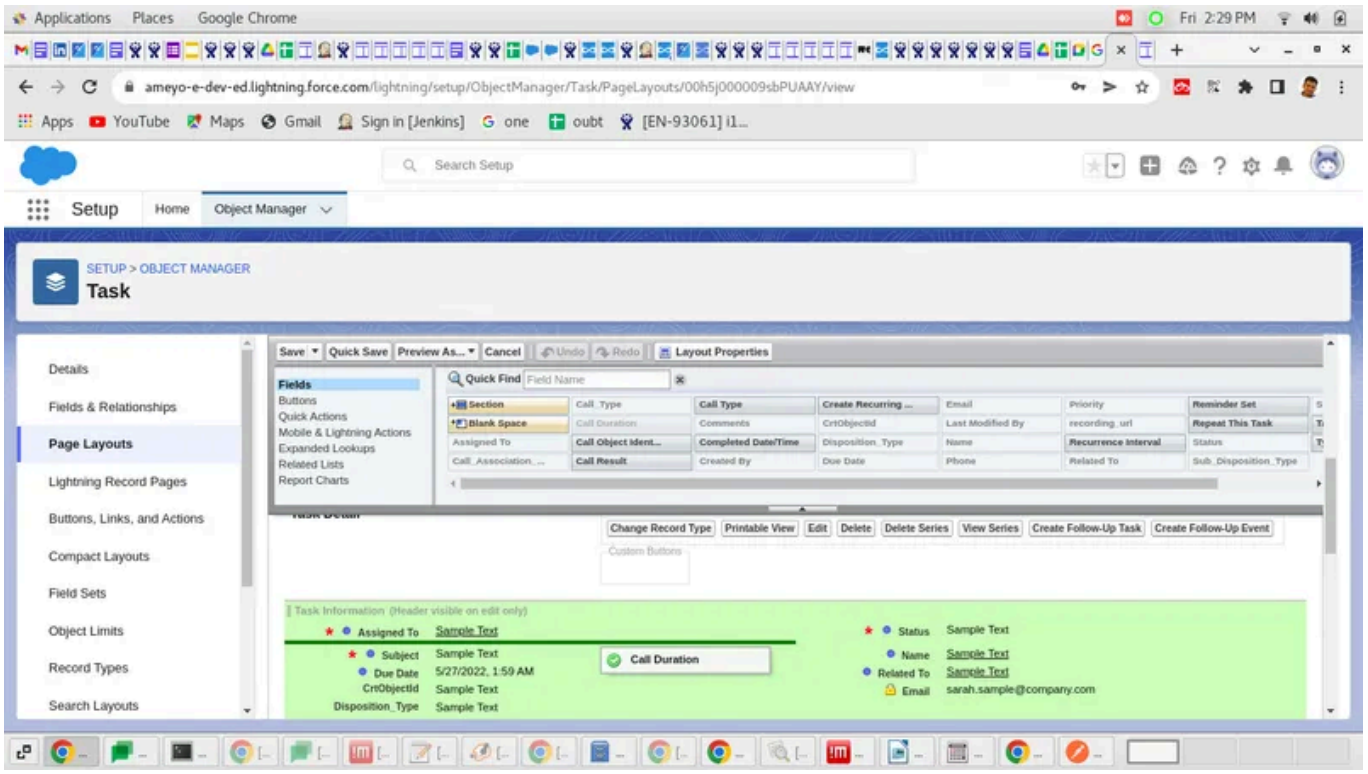
- Use the newly created field for the task so that dumping api will use these.
- Go to Object Manager Tab >> Search for the Task in the quick search panel.



- Open the Task Page and select the Page Layout Then click on the Task Layout name.

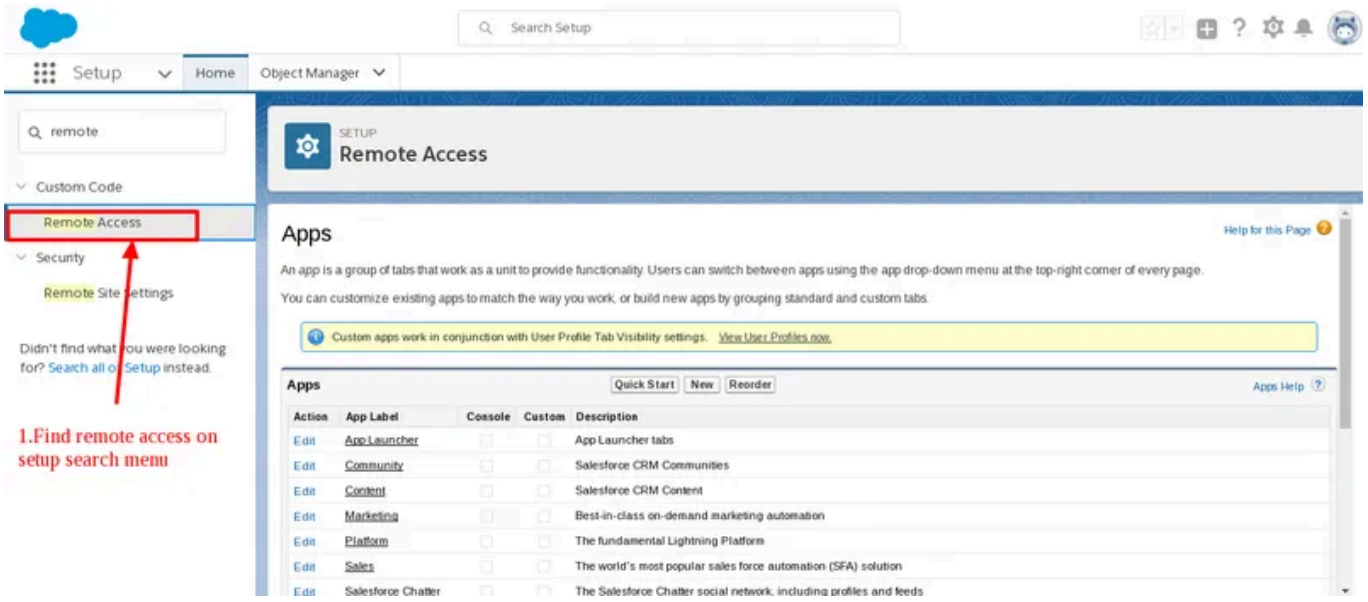


- After open we are able to see the custom fields, Now here we can drag and drop the custom fields on the task page as per the requirement and then click on save button.

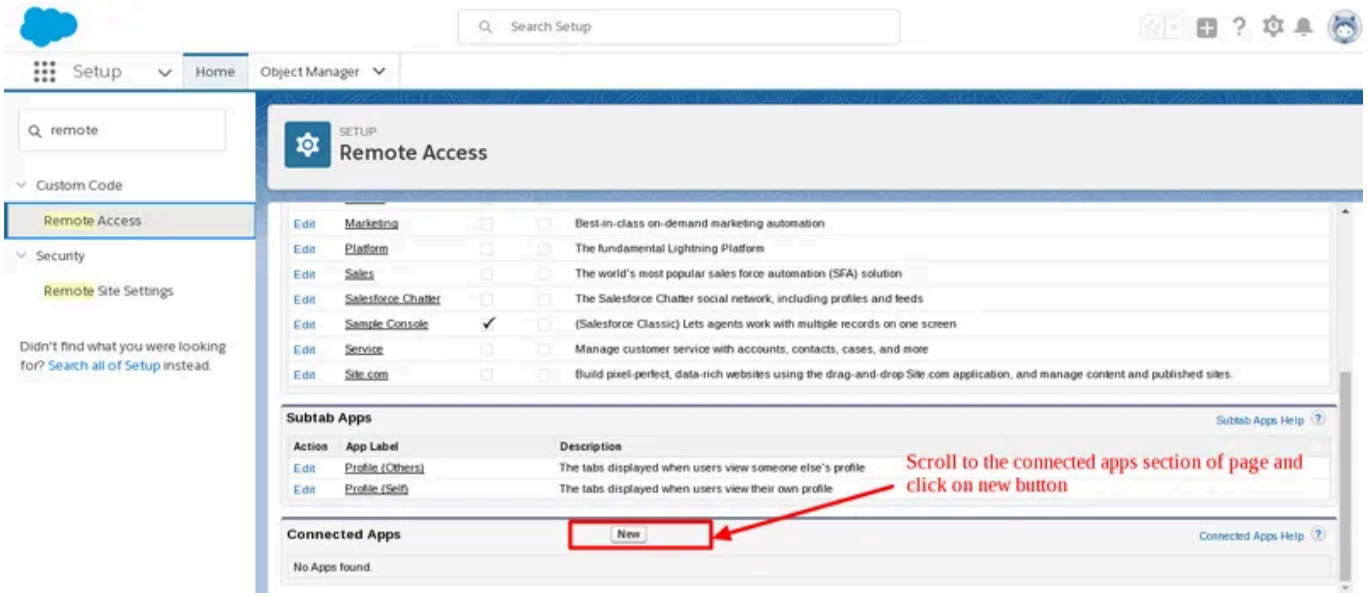


Step 5: Configuration for SSO in Salesforce

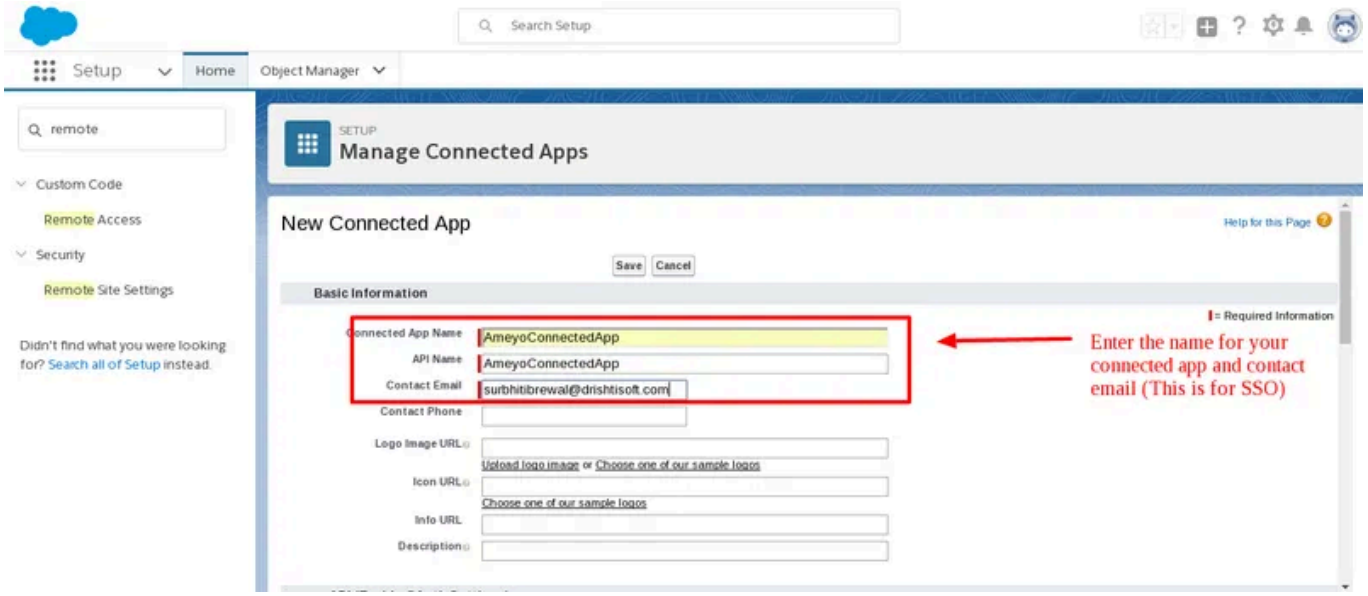
- Search for Remote Access in the search box.



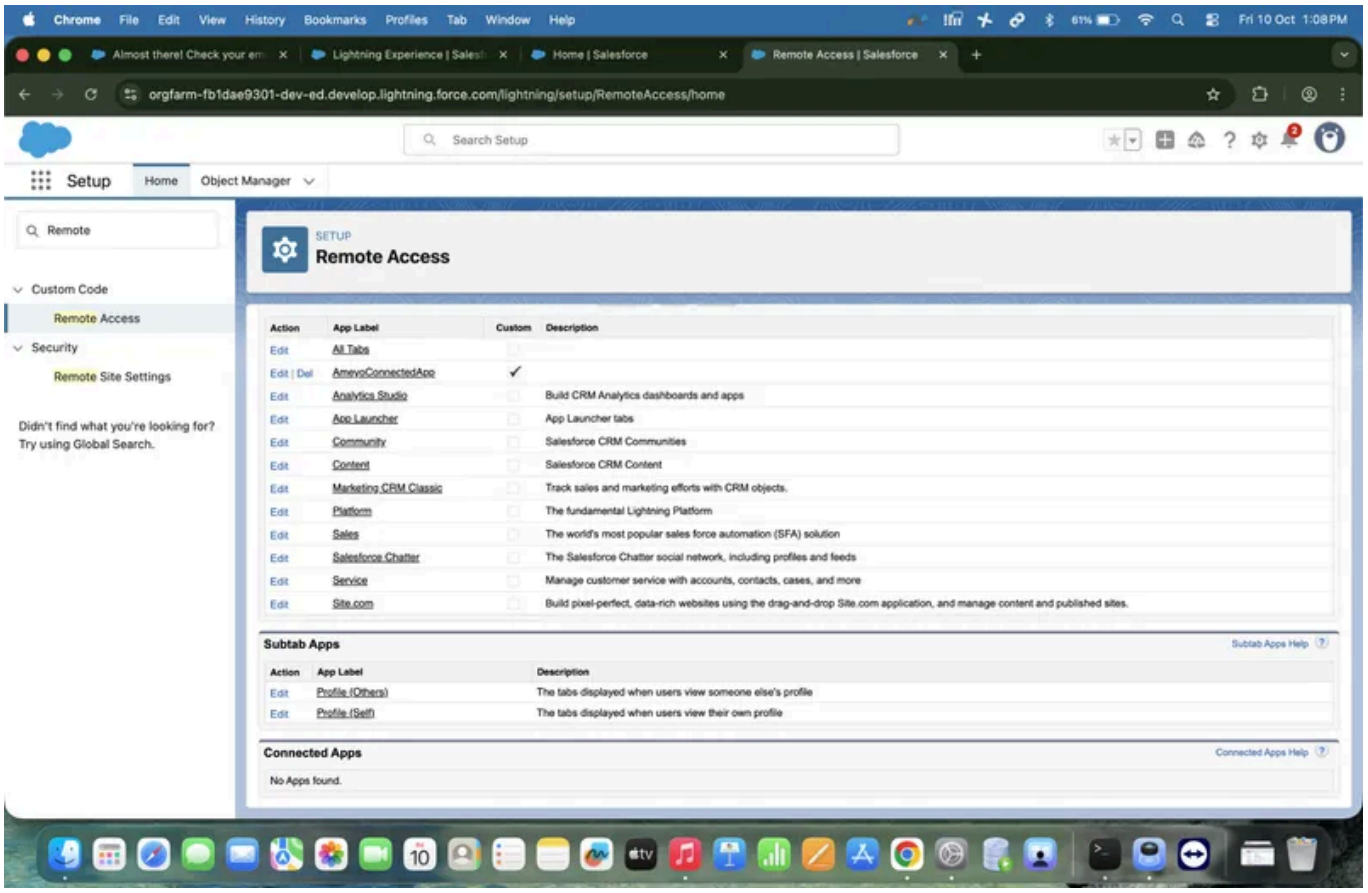
- Scroll to connected apps and click on new button to connect the app.



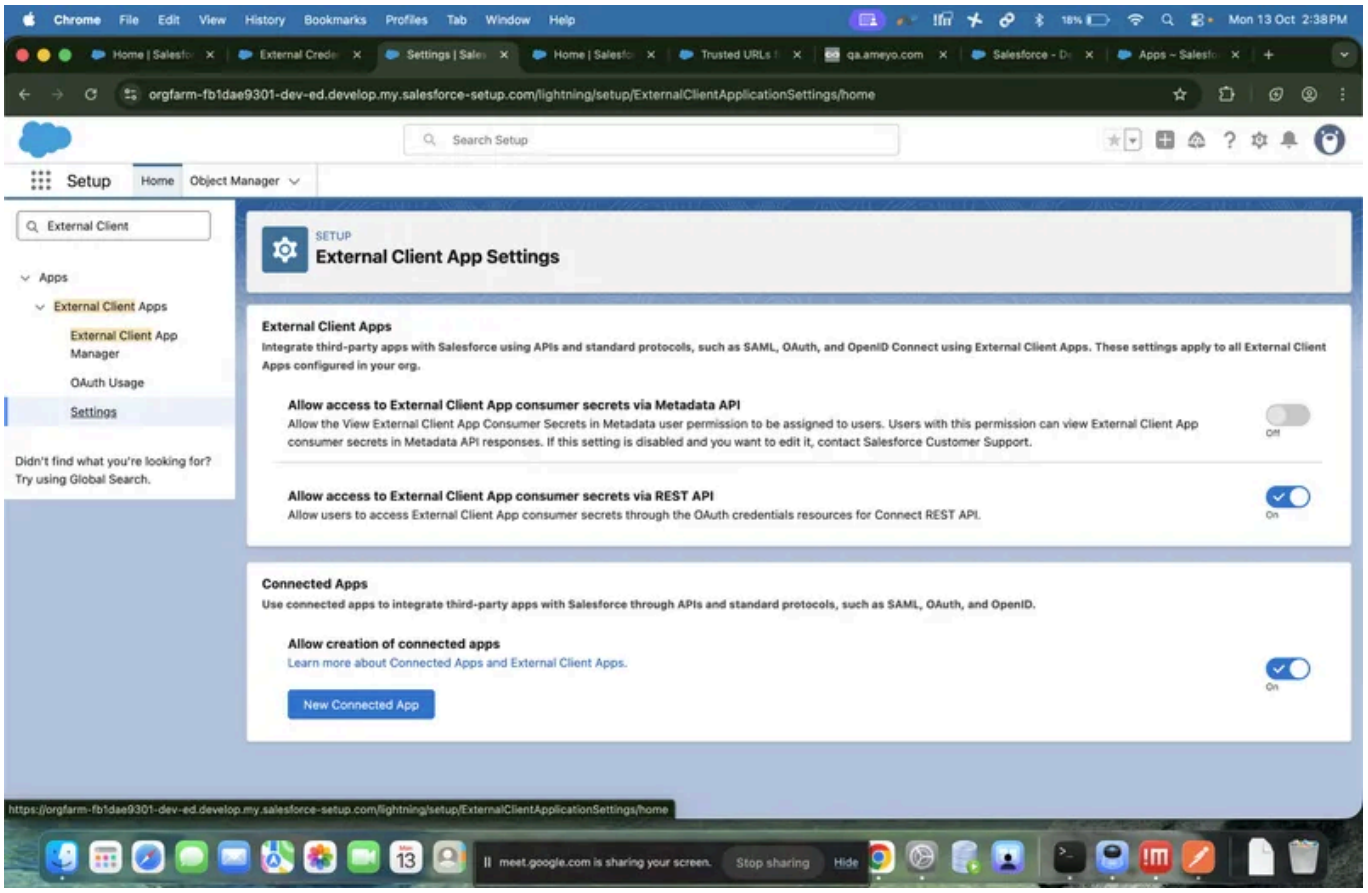
- Enter the name and other required details and scroll down the page.



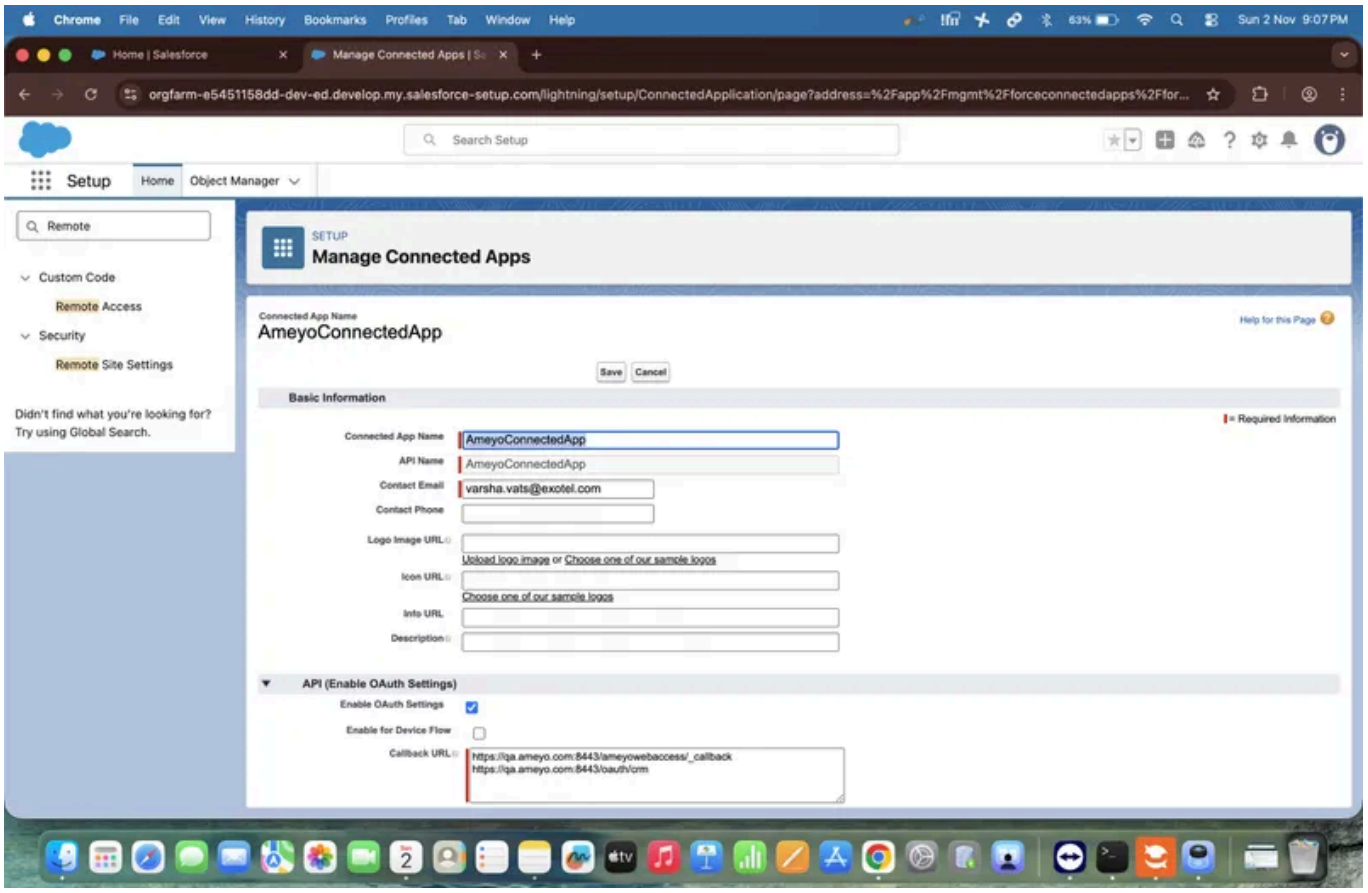
Note : If you didn't find the New option in Connected App section, then follow the below steps because in the new account this option may not be visible directly you have enable some permission to display New Option.



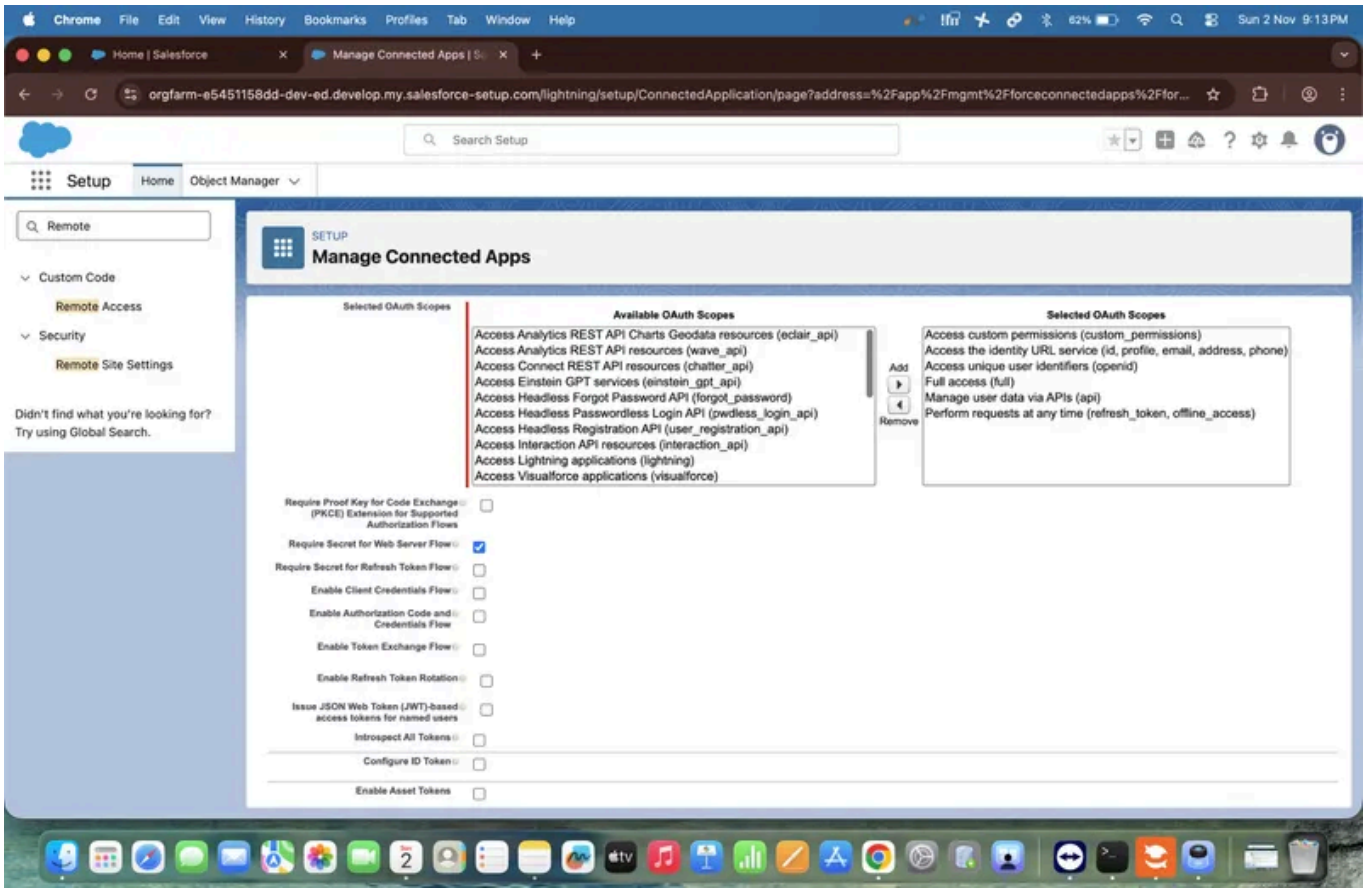
- On Search Box Search External Client Apps.
- Goto Settings.
- Enable Allow creation of connected apps.
- Now click on New Connected App button to create New App.



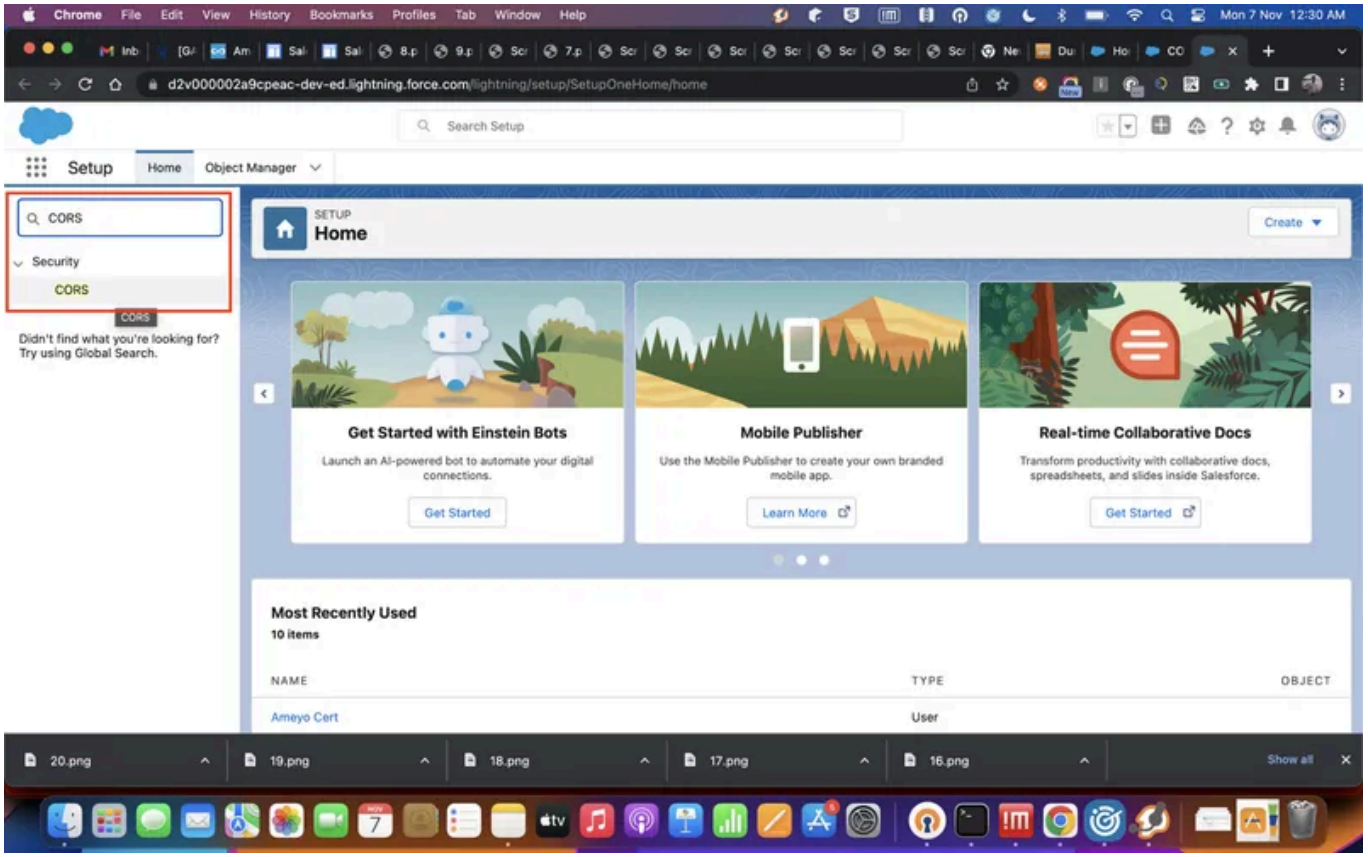
- Filled Below Data :
  - Connected App Name : AmeyoConnectedApp
  - API Name : AmeyoConnectedApp
  - Contact Email : Add Email Id
- Enable OAuth Settings.
  - Add Callback URL.
    https://<Appserver Domain>:<Appserver Port>/ameyowebaccess/_callback
    https://<Appserver Domain>:<Appserver Port>/oauth/crm



- Add Selected Scope and then click on Save.

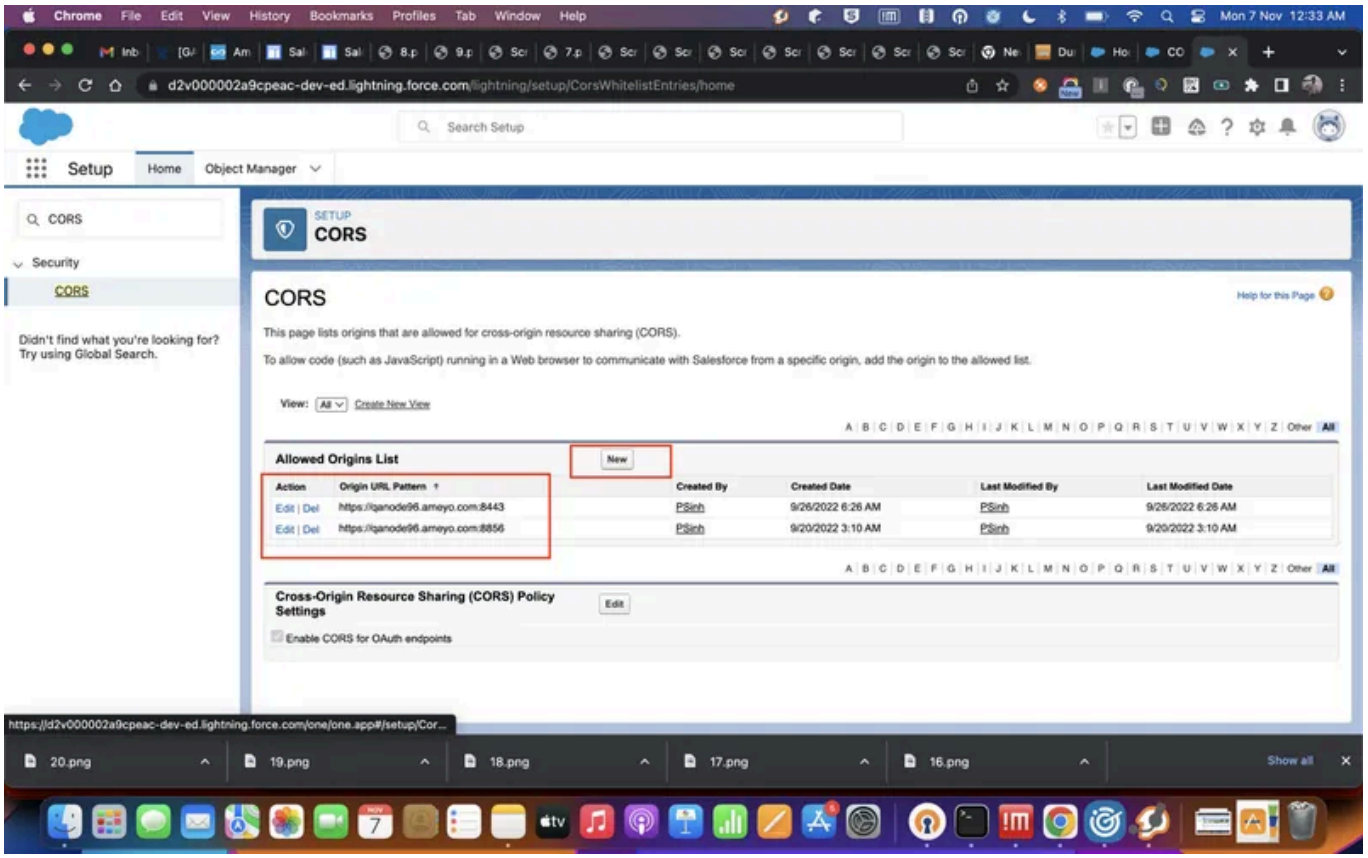


- Now Goto Search Box and search CORS.

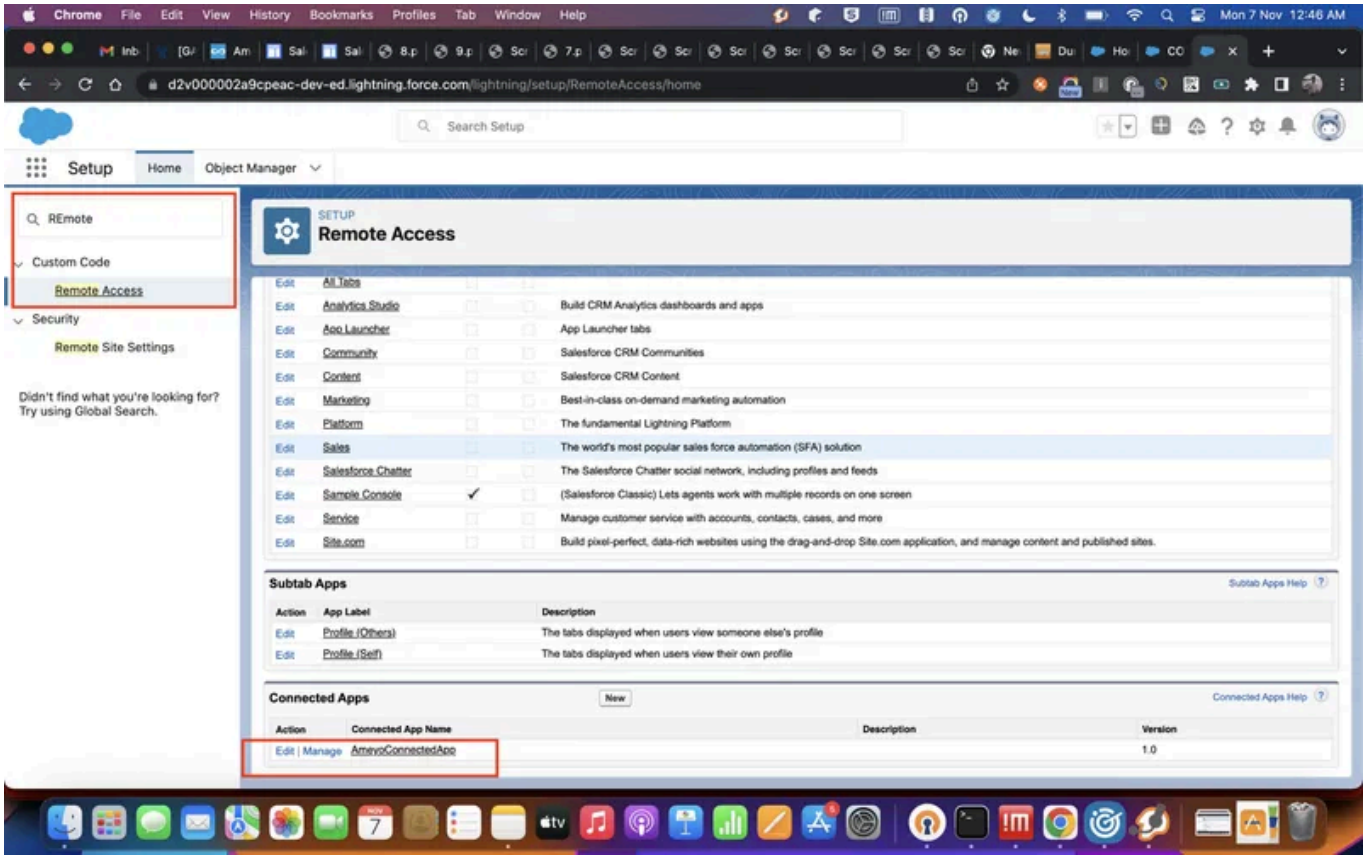


- Now click on New and add the below url :

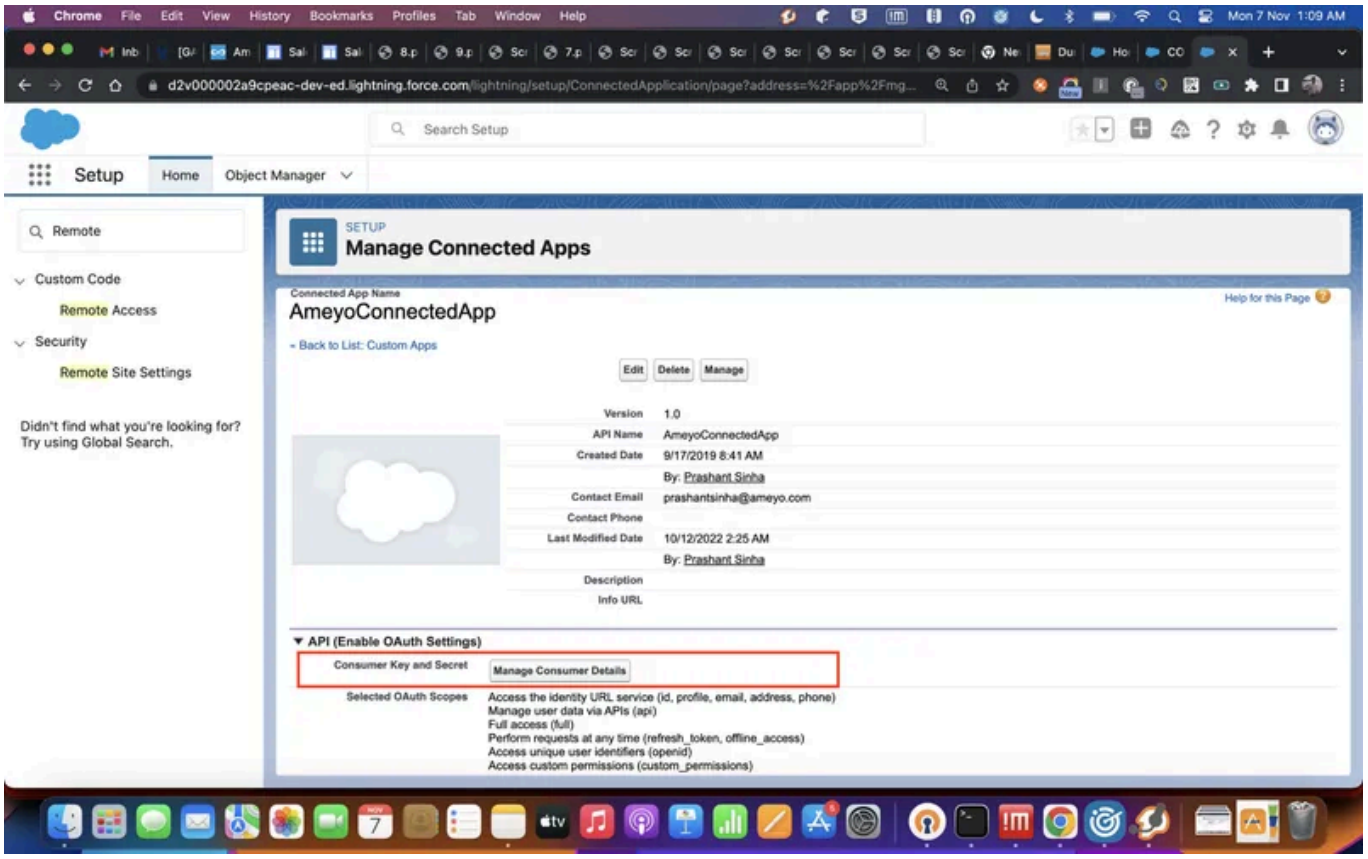
  - [ ] **https://domain:8443 (Domain with appserver port)**
  - [ ] **https://domain:8856 (Domain with SI port)**



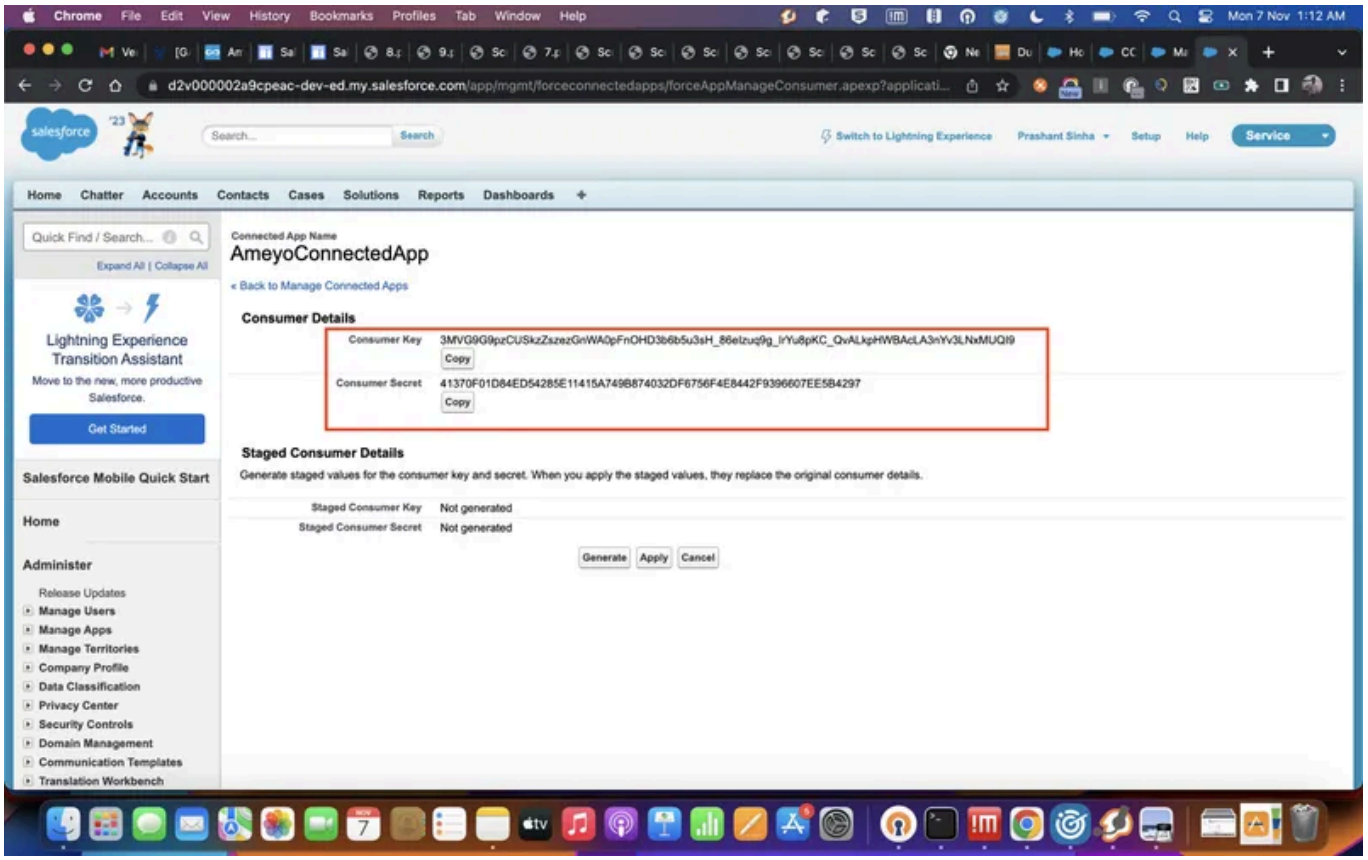
- Goto Remotes Access >> Connected Apps >> Click On AmeyoConnectedApp.



- Now Goto Consumer Key And Secret Section >> Click on Manage Consumer Details.



- Copy the Consumer Key And Secret And Save Any where, This is required for Integration Via CRM Integration App.



14.6.2. Salesforce Integration via CRM Integration App

This document outlines the simplified process for integrating Salesforce CRM with Ameyo using the dedicated UI connector within the Ameyo platform. This UI-driven approach replaces previous backend configurations, streamlining the setup and reducing potential errors. The Salesforce–Ameyo integration, previously managed from the backend, can now be configured directly through the Ameyo user interface. This enhancement simplifies setup, reduces configuration errors, and provides better visibility for administrators.

The document is intended to guide technical teams through the step-by-step process of integrating the Ameyo contact center with Salesforce using the CRM Integration App. It covers the prerequisites, setup steps, and configuration details required to enable this integration, including creating a Salesforce developer account, importing the Ameyo package, configuring toolbars and softphone layouts in Salesforce, adding custom fields, setting up SSO, and mapping Ameyo users to Salesforce users. It also details limitations, gaps, and troubleshooting tips for common issues encountered during integration.

Key Purpose:

Key purposes of the document include:

- Enabling telephony and CRM integration for call centers using Salesforce.
- Setting up Single Sign-On (SSO) between Salesforce and Ameyo.
- Synchronizing user accounts between Salesforce and Ameyo.
- Configuring server-side or client-side call data dumping to Salesforce.
- Providing guidance for customizations such as softphone layouts and custom activity fields.

Functionality

All the configurations have been done on UI for simplifying the Ameyo-Salesforce Integration.

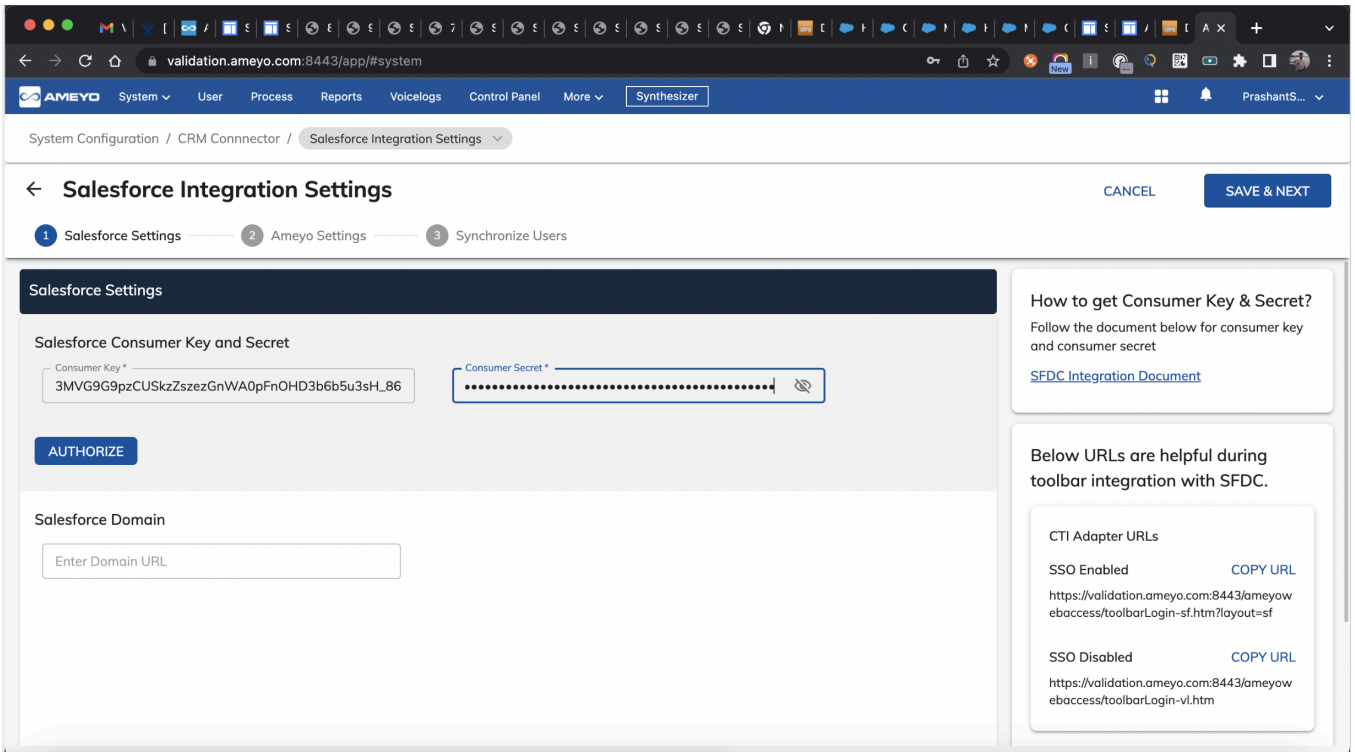
The **Admin/Voice Admin** is able to view the **Settings tab** for **CRM integrations**.

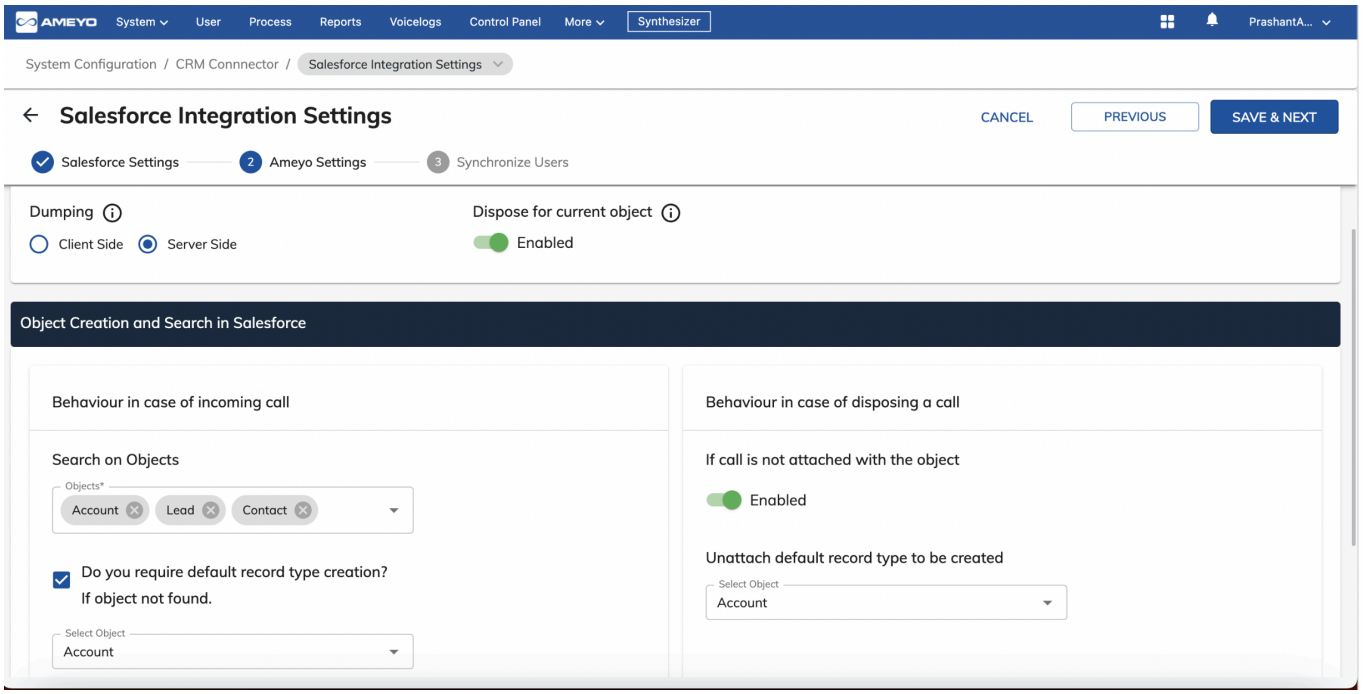
- The list shows all the integrations that can be done with Ameyo.

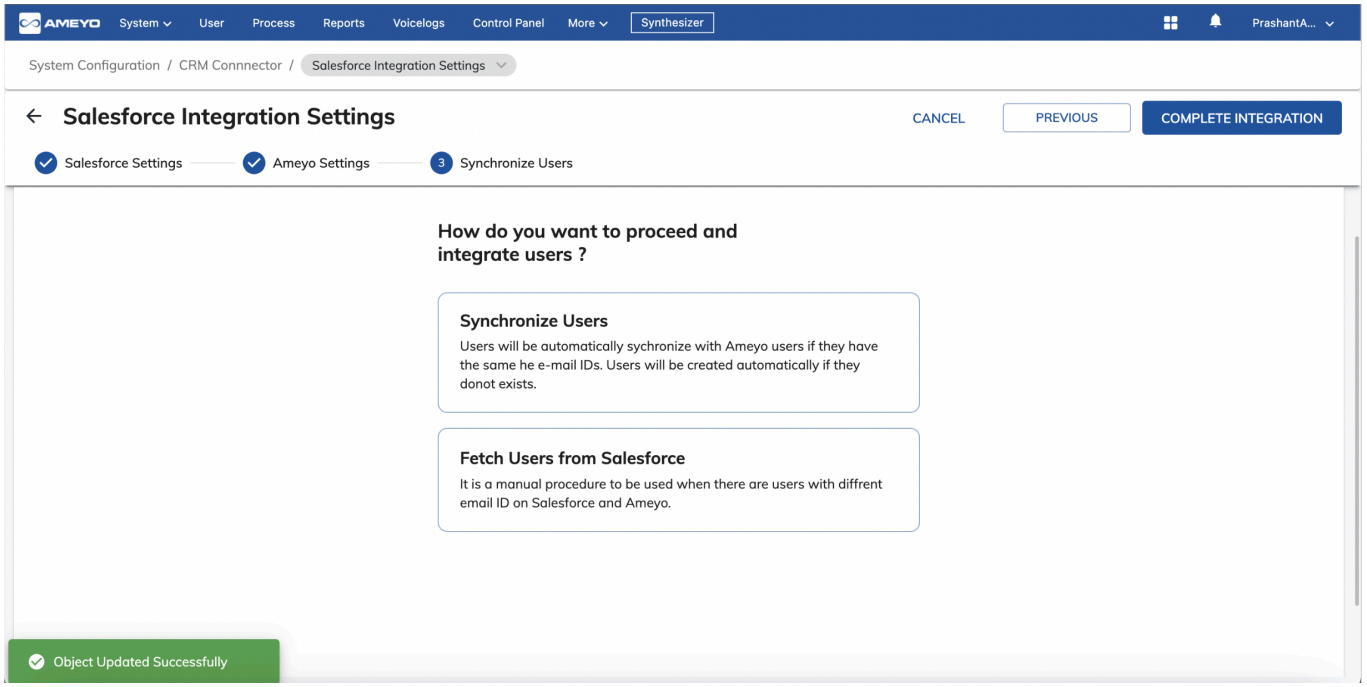
- Implementing the Salesforce Integration, the user selects the "Connect" option on the Salesforce CRM connector.
- SFDC CRM connector app is enabled in the App Manager.

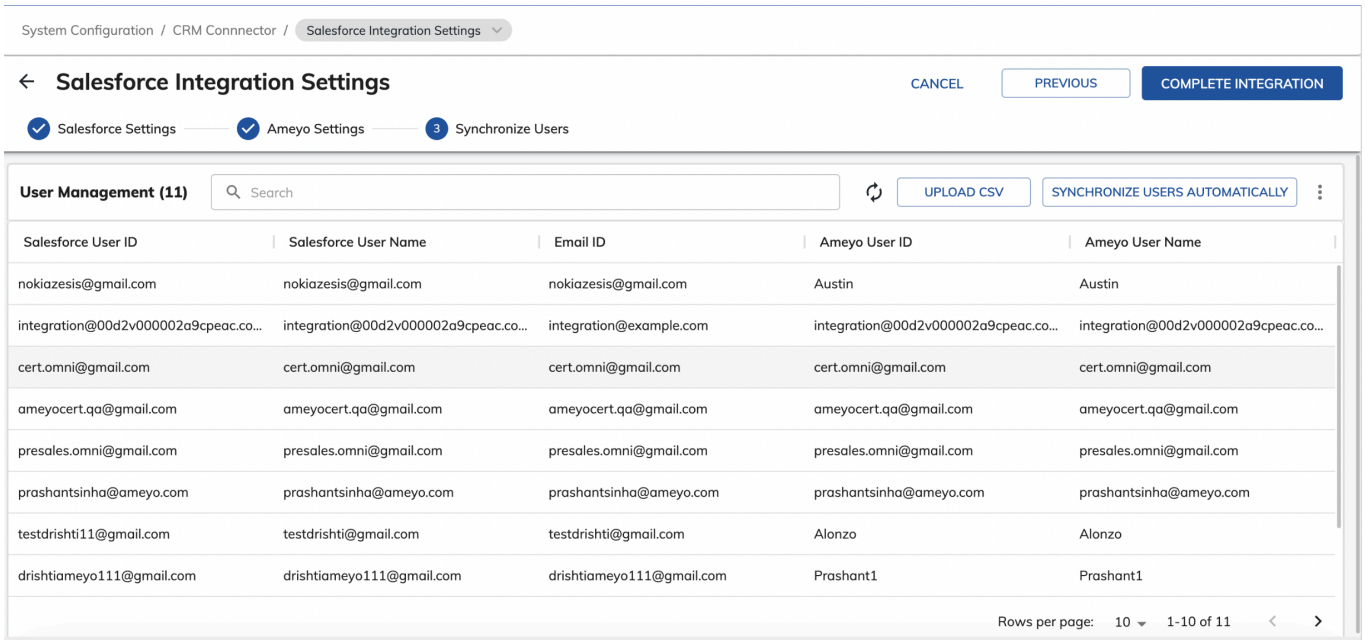
- The SFDC Integration Settings Page, it is divided into 3 steps:-
  - **Salesforce Settings** :- This includes the information to be filled from the user's Salesforce account to proceed with the integration.
    1. The user needs to enter the Consumer Key and Consumer Secret.
  - **Ameyo Settings** :- These are the settings to be done specific to Ameyo for objects, dumping etc.
    1. The user first needs to select which object to be created, if a call comes from a new customer.
    2. The user has to select the objects on which the search is to be performed for an incoming call.
    3. The user needs to enable/disable, if call has to be disposed for the current object that is opened or only the object that opens with the call.
    4. By default, the agent should only be able to dispose of the call with the object that opens with the call.
    5. The user can select whether to choose client side/server side dumping.
  - **Synchronize users** :- This is for mapping the users of Ameyo and Salesforce that are working with the integration.
    1. **Synchronize Users Automatically** :- Users are created automatically synchronize with Ameyo users, if they have the same email - ID's. Users are created automatically, if they don't exist.
       - "Add User" in case a user has to be created from Ameyo and added to the list.
       - Extract Users - This extracts the users created in Ameyo in case the Admin needs to refer to the same for creating users in Salesforce.
    2. **Fetch users from Salesforce** :- It is a manual procedure to be used when there are users with different email - ID's on salesforce and Ameyo.
       - Now 2 sub sheets are downloaded for SFDC (to be uploaded) and Ameyo users.

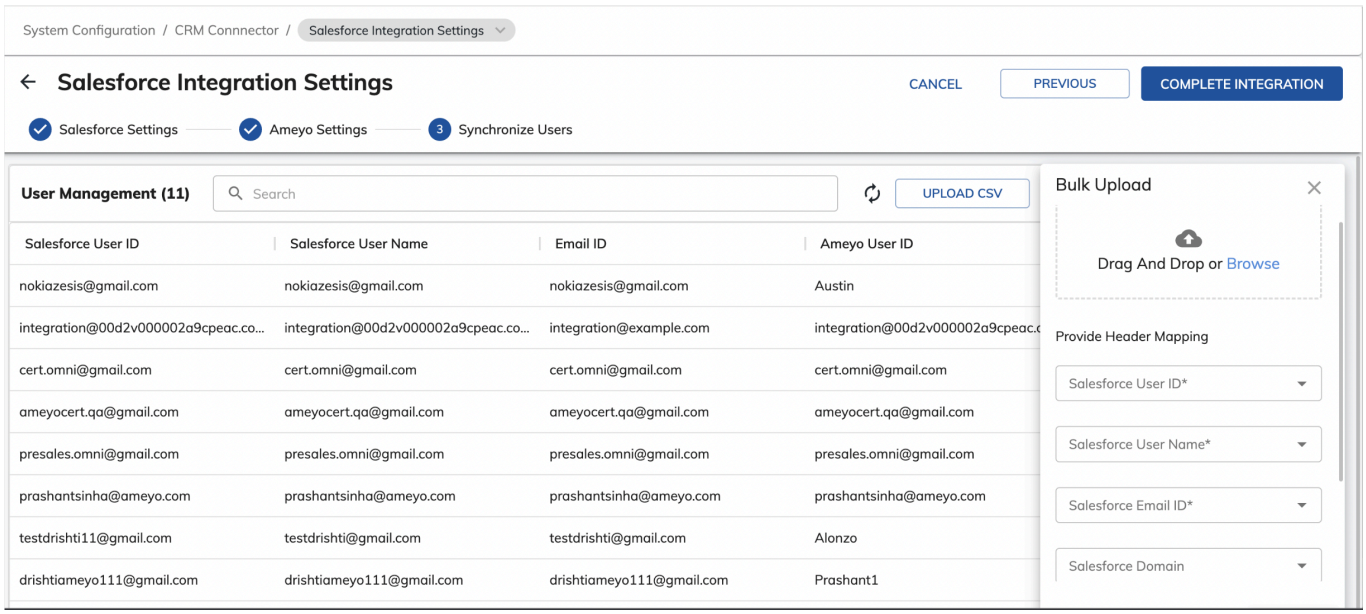
- The user selects the "Bulk Upload" option to upload a CSV that will contain the following fields-
  - Salesforce user ID
  - Salesforce user Name
  - Email ID
  - Ameyo user ID
  - Ameyo user Name
- The header mapping is provided, in case the CSV is having fields with different names than those mentioned above.
- The upload summary is shown after the upload is completed.
- The bulk update option can also be used to update certain records in the user management list.




AMEYO
System
User
Process
Reports
Voicelogs
Control Panel
More
Synthesizer
PrashantA...
System Configuration / CRM Connnector / Salesforce Integration Settings
Salesforce Integration Settings
CANCEL
PREVIOUS
SAVE & NEXT
Salesforce Settings
2 Ameyo Settings
3 Synchronize Users
Dumping
Client Side
Server Side
Dispose for current object
Enabled
Object Creation and Search in Salesforce
Behaviour in case of incoming call
Search on Objects
Objects*
Account
Lead
Contact
Do you require default record type creation?
If object not found.
Select Object
Account
Behaviour in case of disposing a call
If call is not attached with the object
Enabled
Unattach default record type to be created
Select Object
Account


AMEYO
System
User
Process
Reports
Voicelogs
Control Panel
More
Synthesizer
PrashantA...
System Configuration / CRM Connnector / Salesforce Integration Settings
Salesforce Integration Settings
CANCEL
PREVIOUS
COMPLETE INTEGRATION
Salesforce Settings
Ameyo Settings
3 Synchronize Users
How do you want to proceed and integrate users ?
Synchronize Users
Users will be automatically sychronize with Ameyo users if they have the same he e-mail IDs. Users will be created automatically if they donot exists.
Fetch Users from Salesforce
It is a manual procedure to be used when there are users with diffrent email ID on Salesforce and Ameyo.
Object Updated Successfully





Limitations and known facts with feature

- **New Setups:** This UI-based integration method is primarily recommended for configuring Salesforce integration on new Ameyo setups.
- **Default User Role:** When using the "Synchronize Users Automatically" option, any new users created in Ameyo will be assigned the "Professional Agent" role by default. To assign a different role (e.g., "Executive"), you must manually edit the user's profile via the Ameyo Admin interface after synchronization.
- **Consumer ID and Contact Center ID:** For this specific integration method, the consumer_id generated internally will be the same as the contact_center_id you select for the configuration. For example, configuring Salesforce for contact center 10 will result in a consumer_id of 10.

- **Compatibility with Old Process:** User synchronization from Salesforce *to* Ameyo is not supported if the Salesforce integration was initially configured using the older, non-UI-based method.
- **ID Conflict Prevention:** Before configuring, verify that the chosen contact_center_id is *not* already in use as a consumer_id for any *other* existing CRM integration within your Ameyo instance. Using an already assigned ID will cause duplicate configuration entries and is strongly discouraged.
- **Synchronization After Manual Mapping:** If you manually map users (e.g., via Bulk Upload) and *subsequently* use the "Synchronize Users Automatically" button, errors will appear in the User Upload History for the previously mapped users. This occurs because the automatic sync uses a 'create user' function, leading to duplicate record errors for existing mappings.

> **Beta Feature:** The CRM Integration App was introduced in version 4.13.5 and is currently recommended for **new integrations only**. Existing Salesforce setups configured via the older backend method should continue using that method until a migration path is officially provided.

Version History

Version	Enhancement	Release Notes
4.13.5	New CRM Integration App for simplified UI-based Salesforce setup (beta, new integrations only)	

14.6.3. Salesforce CRM Integration configurations at Ameyo End

This document serves as a guide to carry out the Salesforce CRM integration configurations at Ameyo's end.

Ameyo Database Configuration

1. **Configure System and Server Preference Tables:**
    - Connect to your Ameyo PostgreSQL database.
    - Execute the following INSERT queries to configure the integration settings. Replace placeholders like <contact_centre_id> and domain names with your specific values.

```
INSERT INTO system_configuration_parameter (name, type, value, default_value) VALUES ('start.Properties.flagged-x-frame-options', 'String', "<Protocol>://<Application Domain Name>:<PORT Number>;<Salesforce Domain Name_URL>"', 'ALLOW');
```

```
INSERT INTO server_preference_store (context_type, context_id, key, value) VALUES ('contactCenter', <contact_centre_id>, 'webaccessCRMType', 'SALESFORCE LIGHTNING');
```

```
INSERT INTO server_preference_store (context_type, context_id, key, value) VALUES ('contactCenter', <contact_centre_id>, 'commontoolbarflag', 'ameyo-crm-sf');
```

```
INSERT INTO server_preference_store (context_type, context_id, key, value) VALUES ('contactCenter', <contact_centre_id>, 'webaccessCRMDomain', '<Salesforce Domain Name_URL>');
```

2. **Configure Integration Profile Settings:**
    - Execute the INSERT query for the integration_profile_settings table. This query defines detailed behaviors like searchable objects and field mappings.
3. **Configure SSO in Ameyo:**
    - Execute the INSERT queries for the SSO configuration tables, using the Consumer Key and Secret you obtained from the Salesforce Connected App.

Finalize and Launch

1. **Restart the Ameyo Server:**
    - Restart the Ameyo application server using the following commands:
        - ameyoctl service appserver stop
        - ameyoctl service appserver start
2. **Log In and Access the Toolbar:**
    - Log in to your Salesforce account.
    - Click the **App Launcher** icon in the top-left corner.
    - Click **View All** and select **AmeyoApp Lightning** from the list.
    - In the AmeyoApp Lightning interface, click the **Phone** icon at the bottom-left of the screen to open the Ameyo toolbar.
    - Log in with your Ameyo credentials (if SSO is not active) and select a campaign to begin working.

14.7. Zoho CRM Toolbar Integration with Ameyo

Overview

This document outlines the process for integrating the Ameyo toolbar within the Zoho CRM interface. This integration enhances user productivity by embedding Ameyo's communication functionalities directly into the Zoho environment, enabling seamless call handling alongside customer relationship management. This will be extension based integration approach.

Key Benefits

- **Unified Interface:** Access Ameyo calling features without leaving the Zoho CRM window.
- **CTI Screen Pops:** Automatically display relevant Zoho records (Leads, Contacts) upon receiving or initiating calls.
- **Click-to-Dial:** Initiate calls directly from Zoho records by clicking on phone numbers.
- **Activity Logging:** Automatically log call activities, durations, and dispositions within Zoho records.

Functionality

The integration embeds the Ameyo toolbar as a panel or widget within the Zoho CRM interface. Upon an incoming or outgoing call, the integration searches Zoho CRM based on the caller's phone number. Matching Leads or Contacts are displayed (screen-pop). Users can initiate calls via click-to-dial from Zoho records. Call details, including recordings links and dispositions selected in the Ameyo toolbar, are automatically logged as activities or notes against the corresponding Zoho record.

Prerequisites

- Active Ameyo account with appropriate user licenses.
- Active Zoho CRM account (Professional Edition or higher recommended for certain API functionalities) with administrator privileges.
- ZOHO CRM plan should be Enterprise or above For Widget to get Installed.
- Zoho Data center should be hosted in US which has a sigma developer access.
- Zoho API Key/Credentials for authentication.
- Ameyo-Zoho integration package file (provided by Ameyo).
- Network connectivity between Ameyo servers and Zoho CRM.

14.7.1. Zoho CRM Widget App Creation and Installation Guide

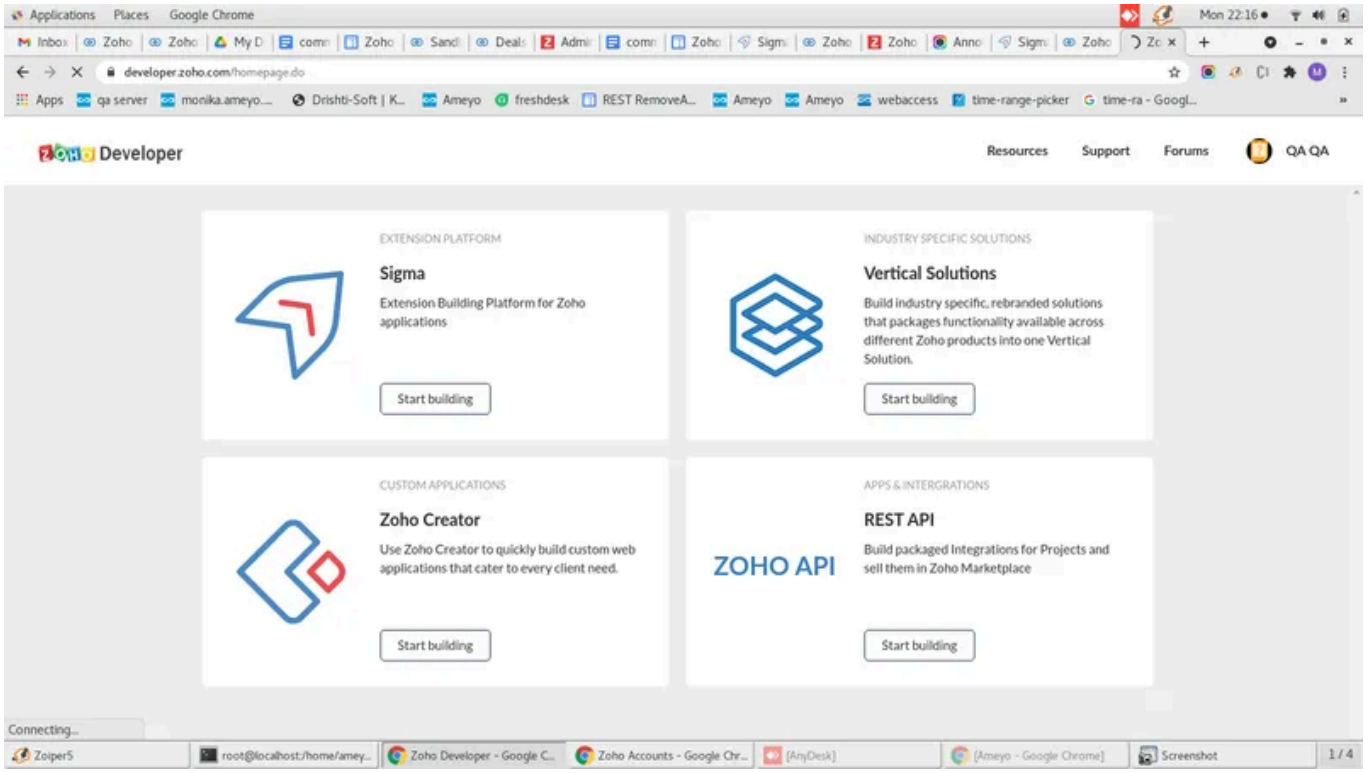
Overview

This document serves as a guide to configure (for the 4.7 release and above) the Zoho Widget App at Zoho application's end. Please follow all the steps for the configuration given below.

Usage Instructions:

Step 1: Add Extension to Zoho Developer Account

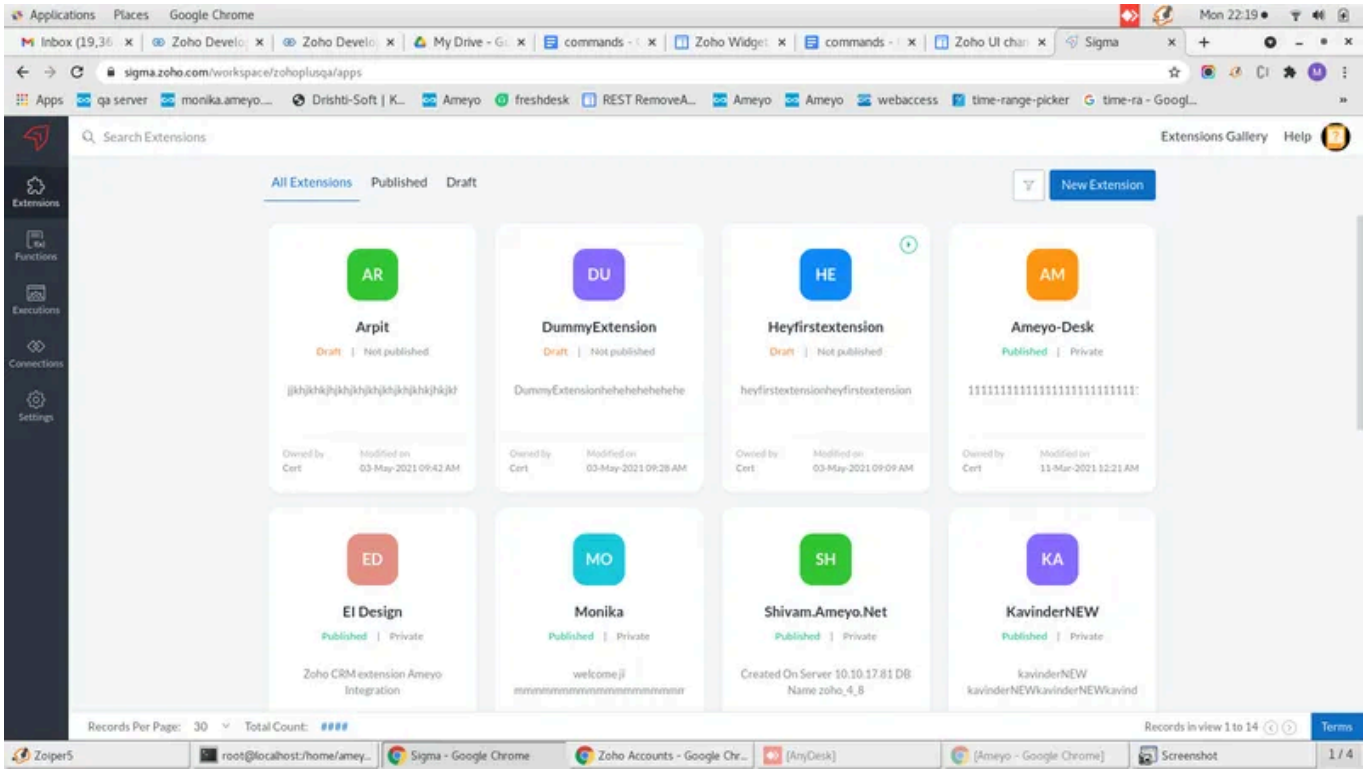
- Visit **Zoho Developer Console** and add your extension to this URL:**https://developer.zoho.com**
- log in with Zoho admin credentials and Navigate to Sigma > Start Building to initiate extension development.

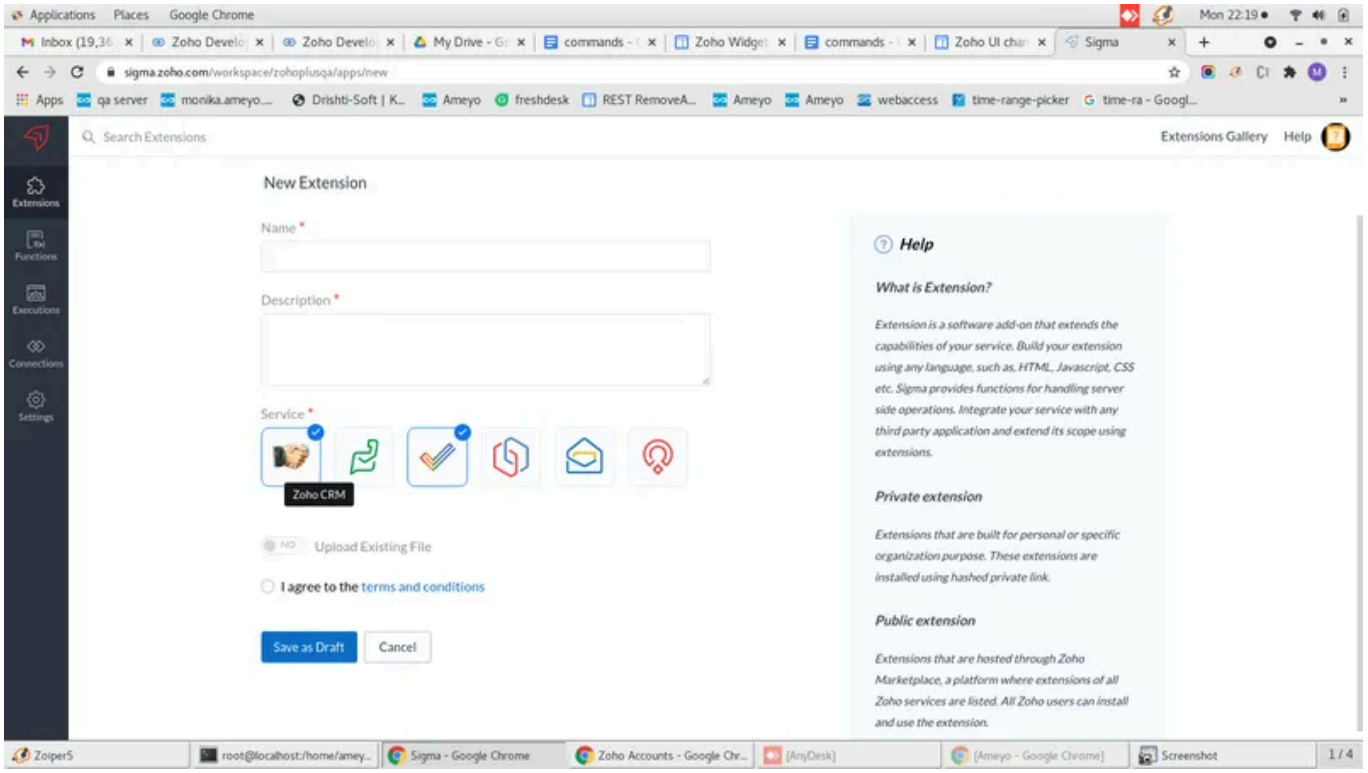


Step 2: Create a New Extension

- Click on “New Extension” within Sigma to begin setup.

- Select **Zoho CRM** as the target application.

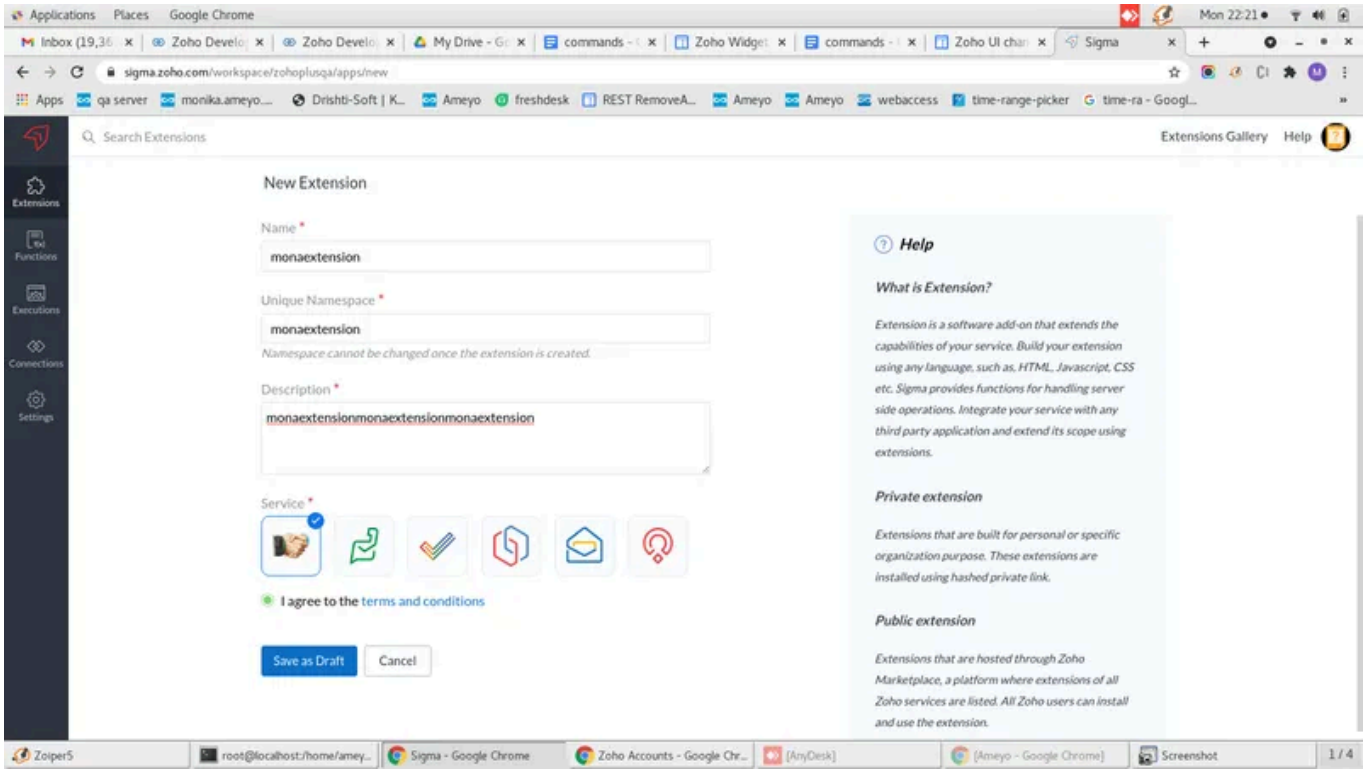


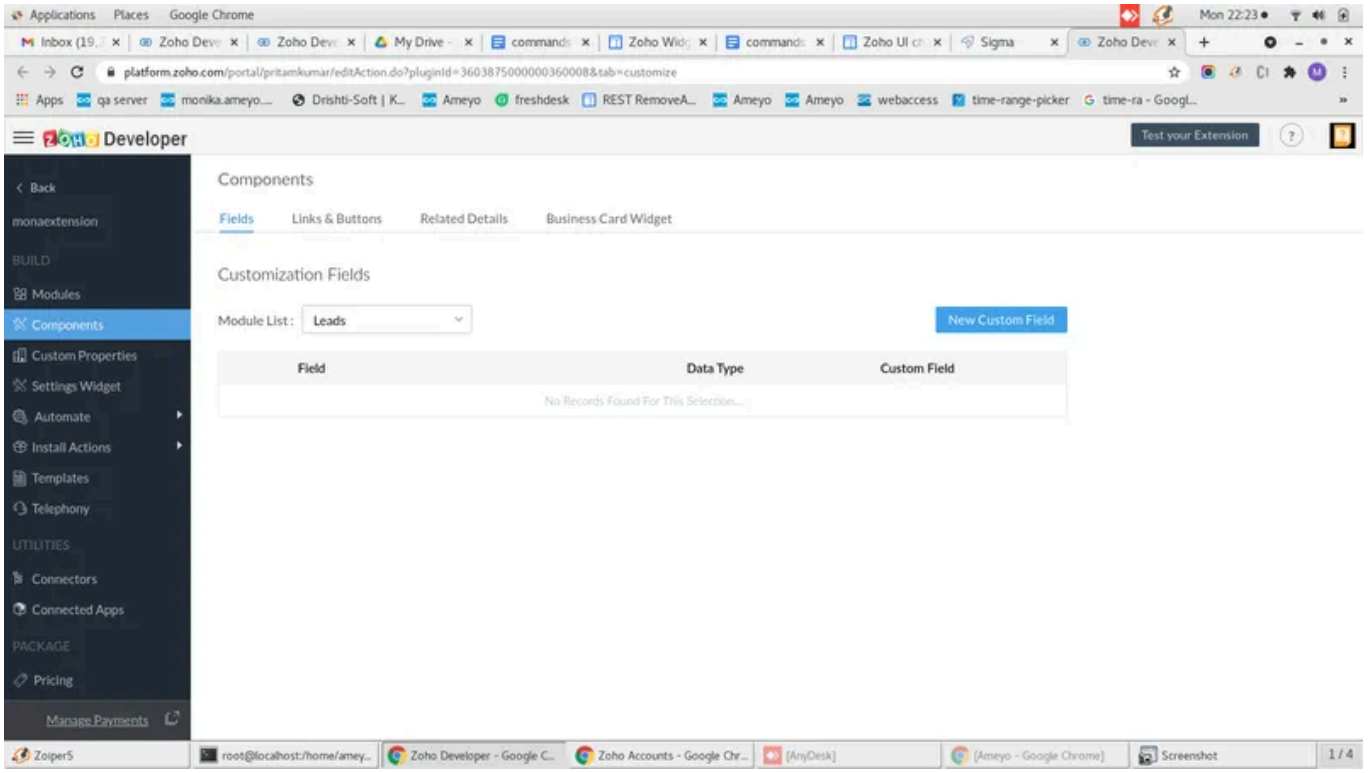


Step 3: Configure the Extension

- Fill out the required configuration fields and save your settings.

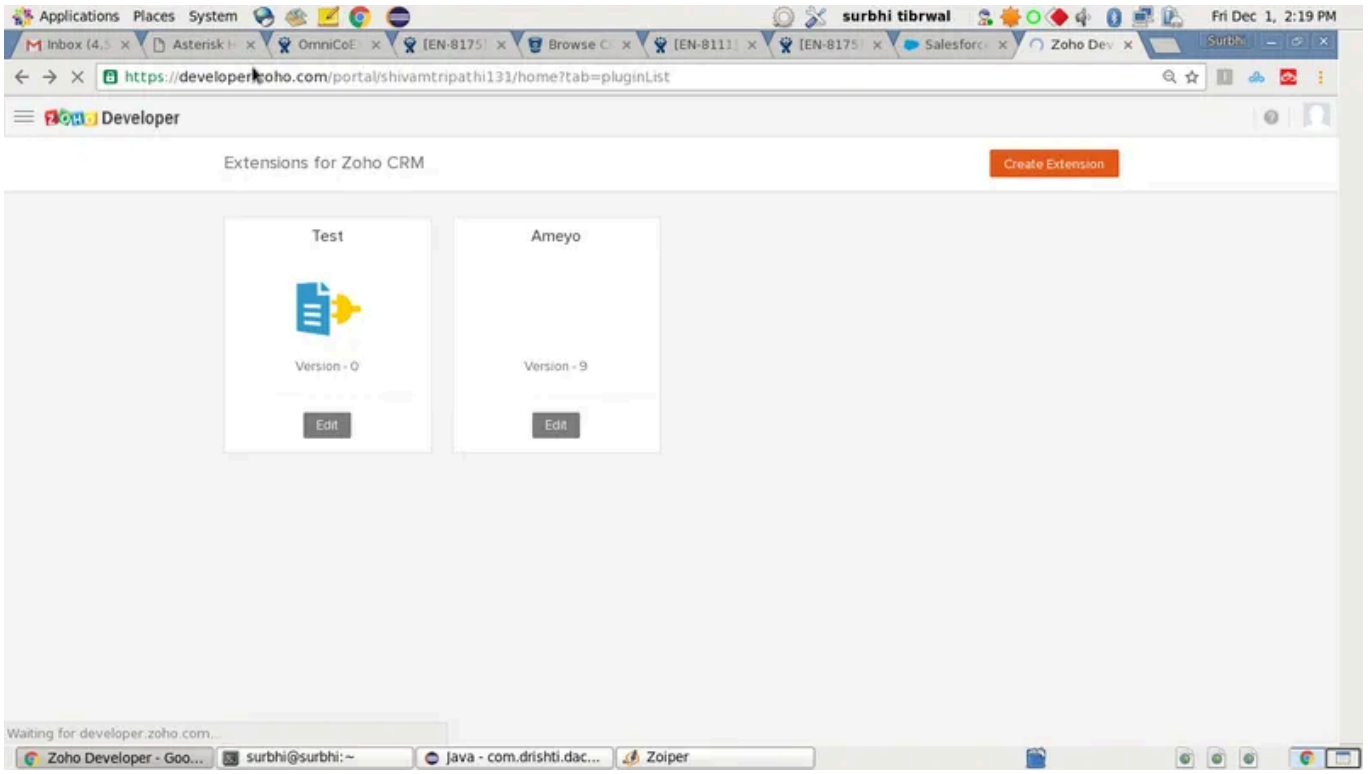
- You will be redirected to the extension management screen upon successful creation.



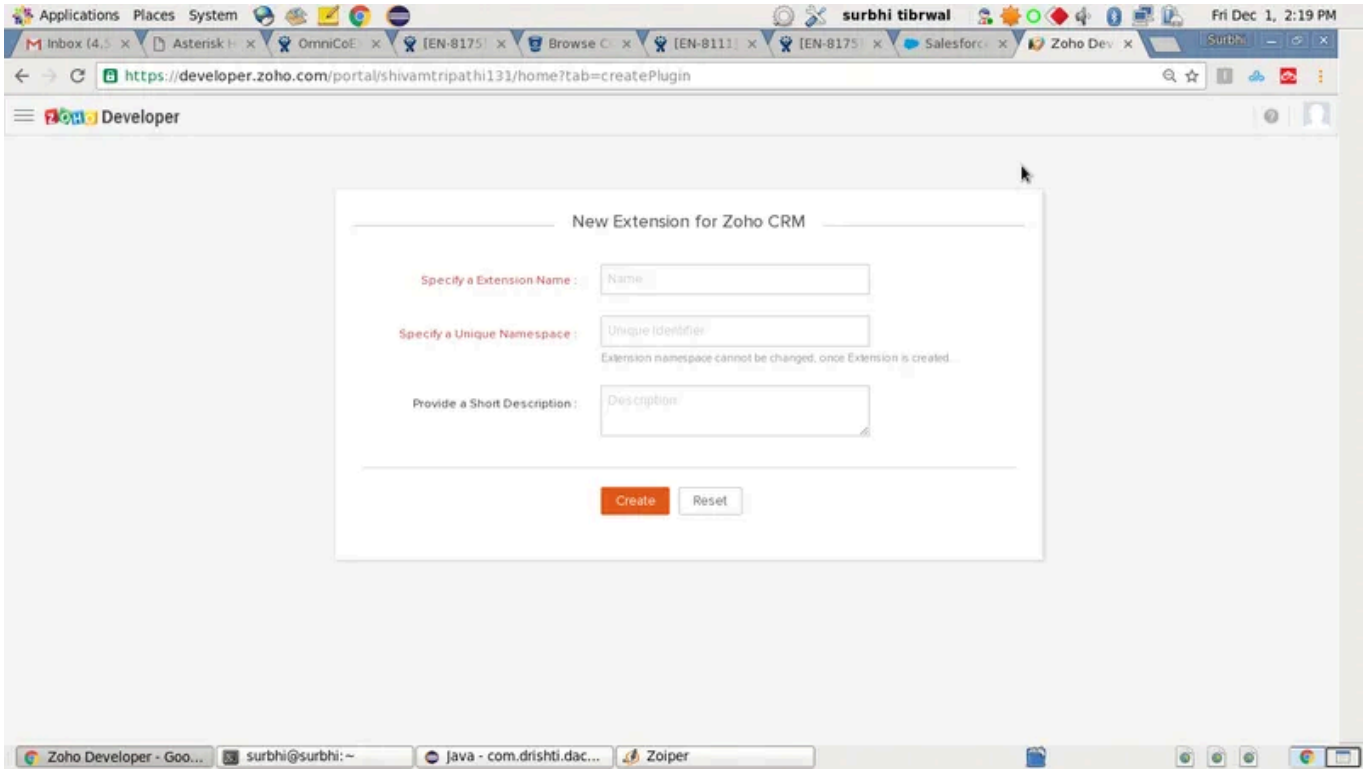


Alternative Extension Creation Path (alternative to step 1 to 3)

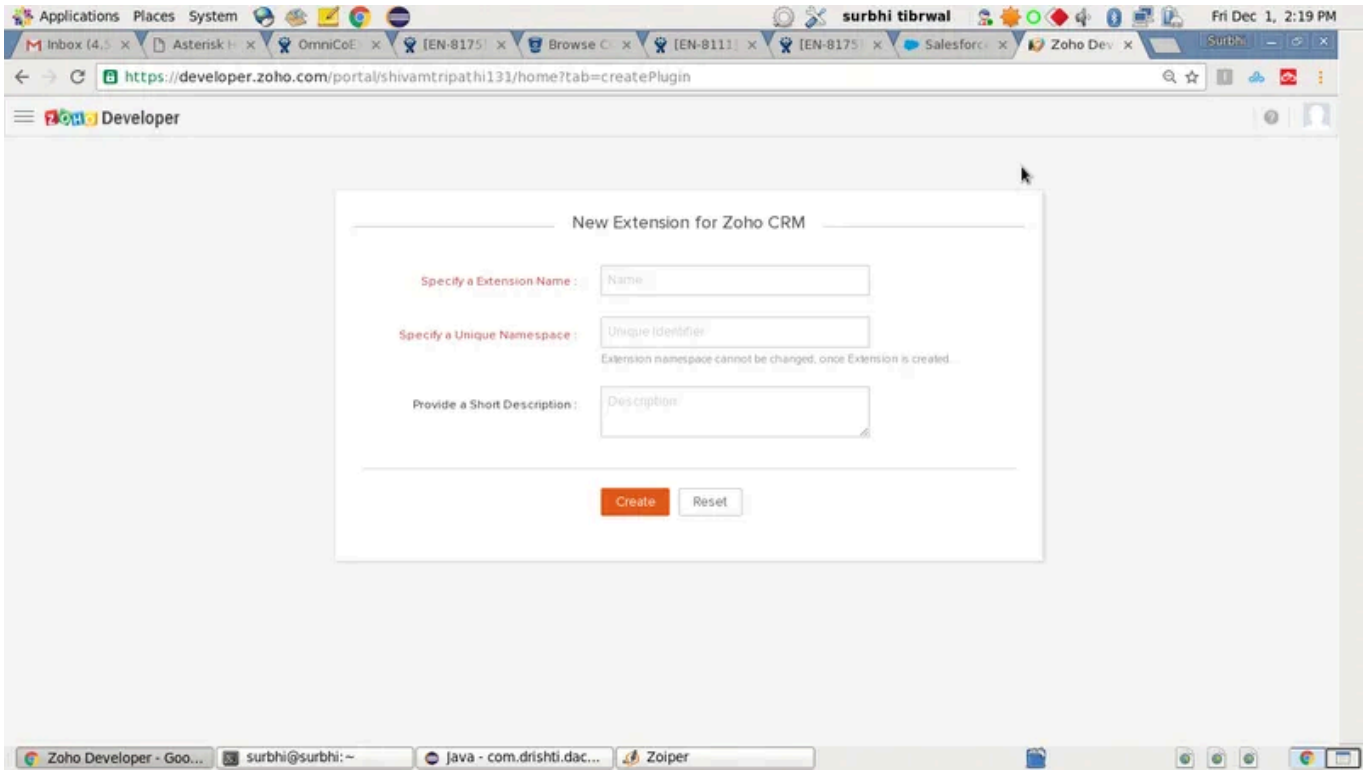
- Visit **Zoho Platform Home**.



- Click “Create an Extension” and provide a unique extension name (e.g., AshwaniAmeyoCom) and namespace.



- Complete setup and click “Create”.

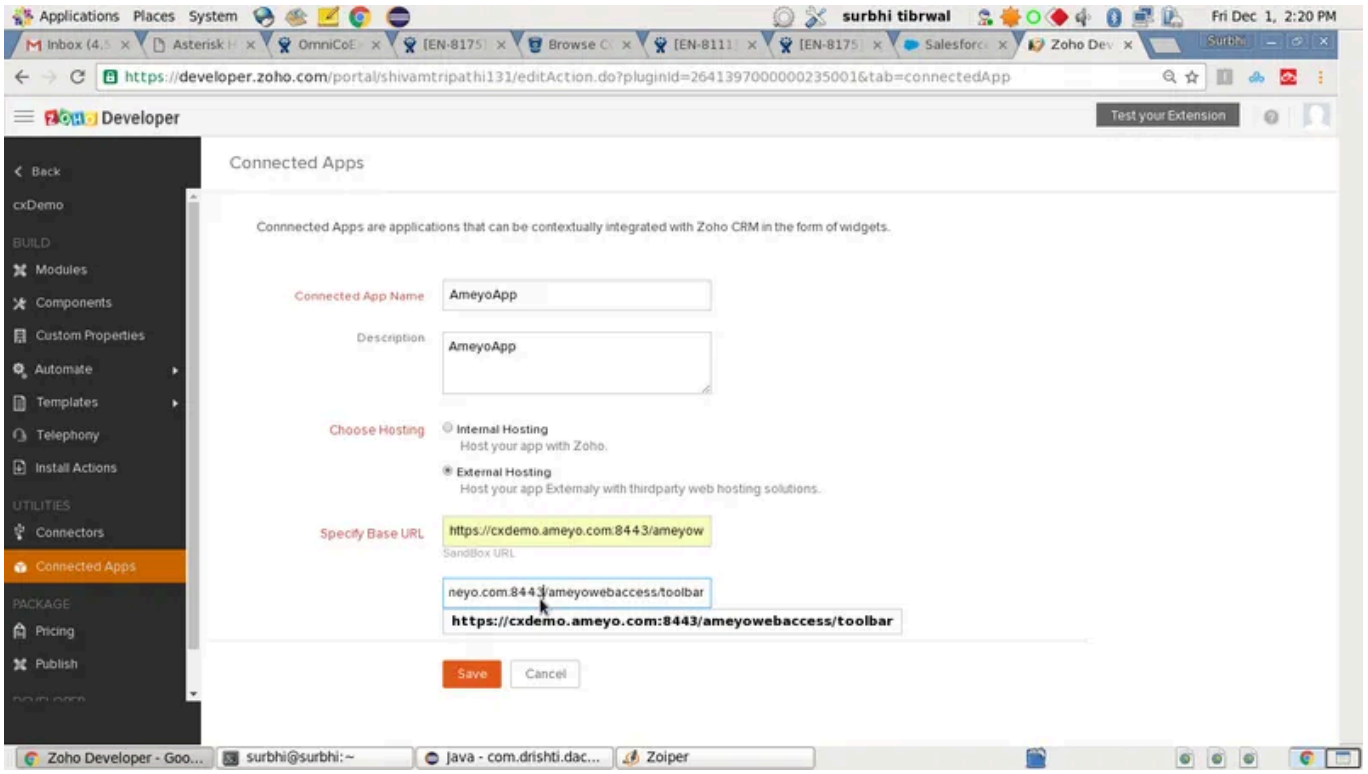


After Creating Extension from the above steps:

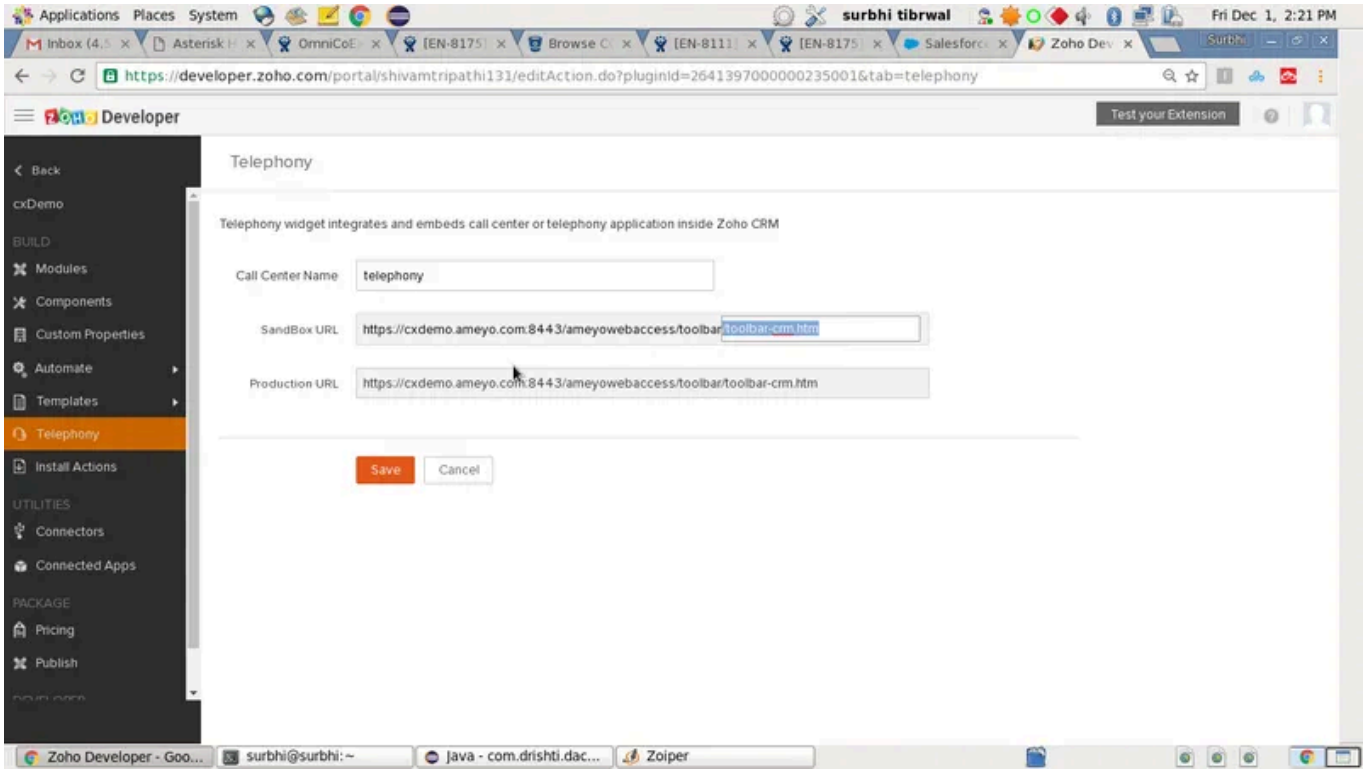
- Now go to the connected apps and provide the connected app name like Ameyo and choose the hosting i.e External Hosting

  Sandbox base URL Ex: https://ashwani.ameyo.com:8443/ameyowebaccess/toolbar

- Provide the production base URL (Ex:https://ashwani.ameyo.com:8443/ameyowebaccess)

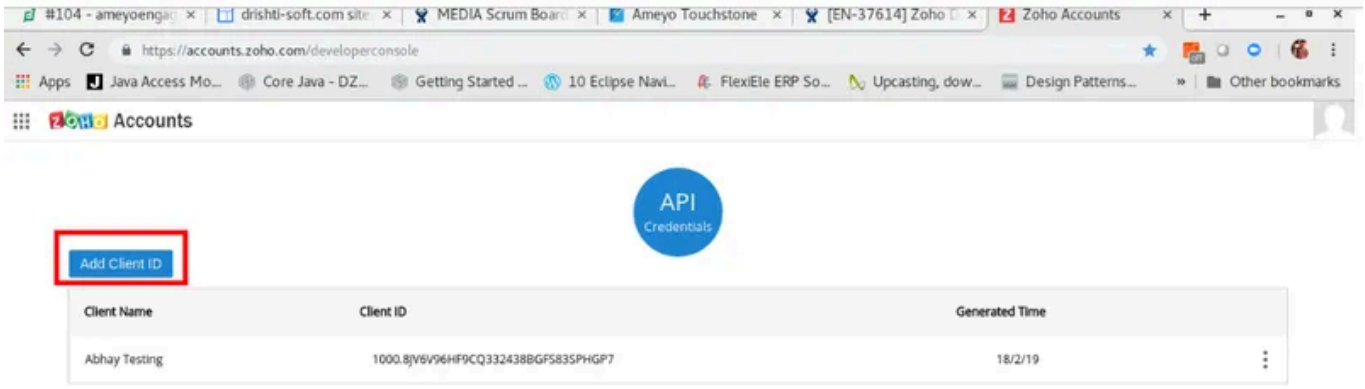


- Now go to the telephony tab from the left panel and provide the relevant information.

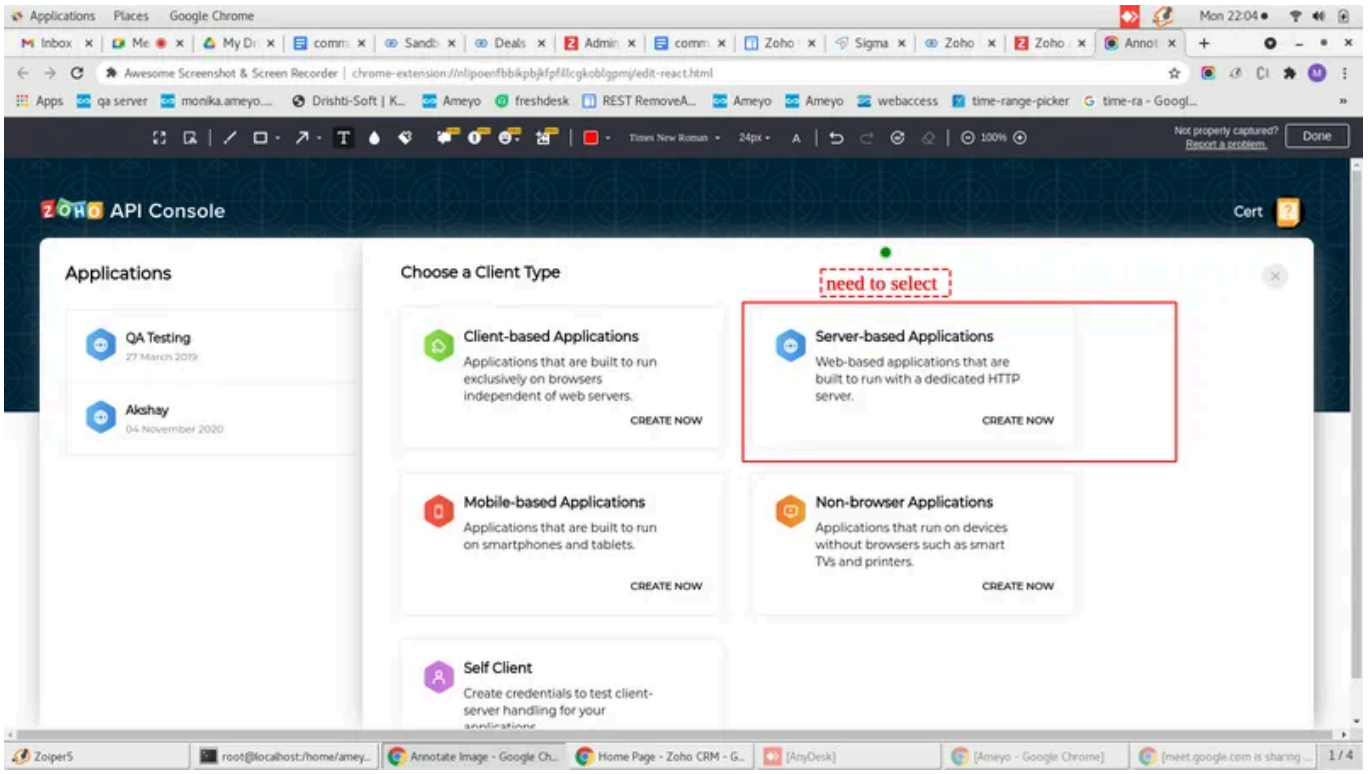


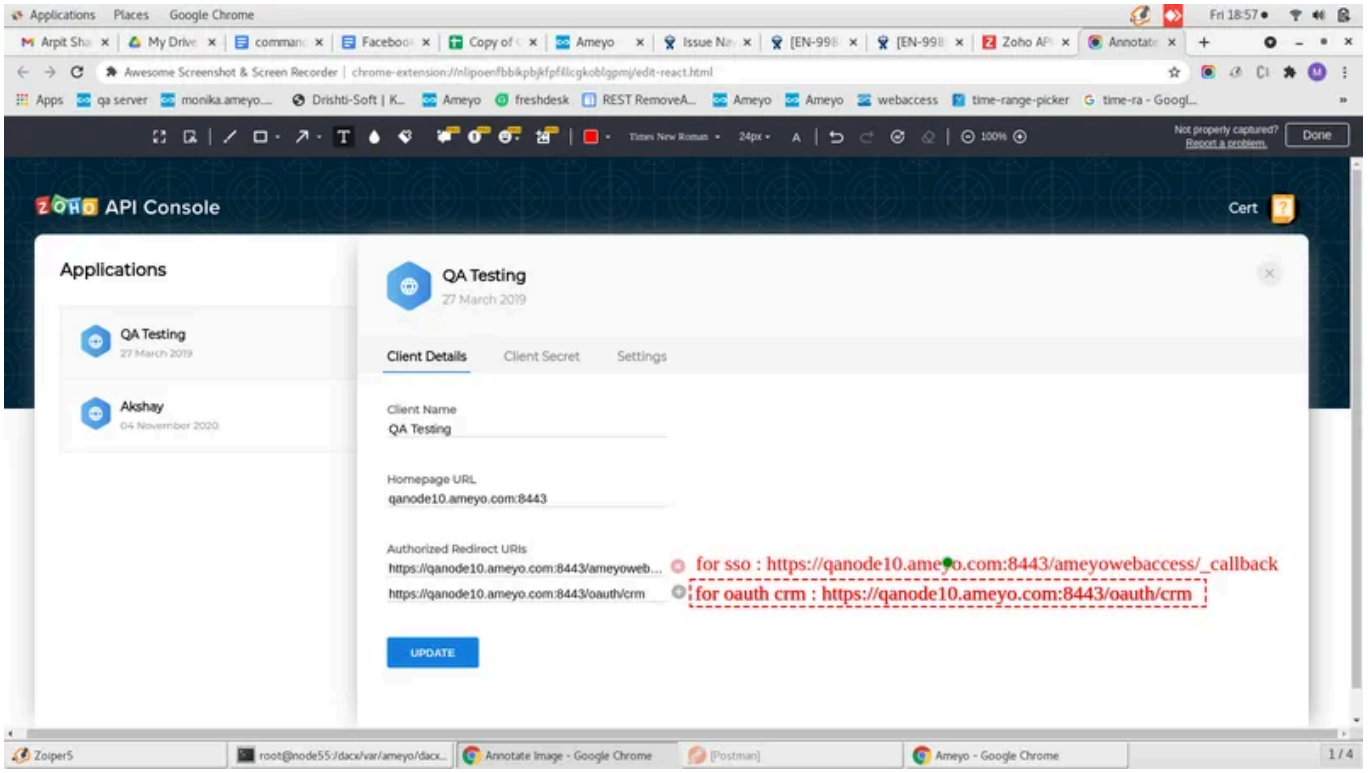
Step 4: Configuration For CRM OAuth for the SSO and CRM Authorization

- Add a Client ID for CRM OAuth configuration.



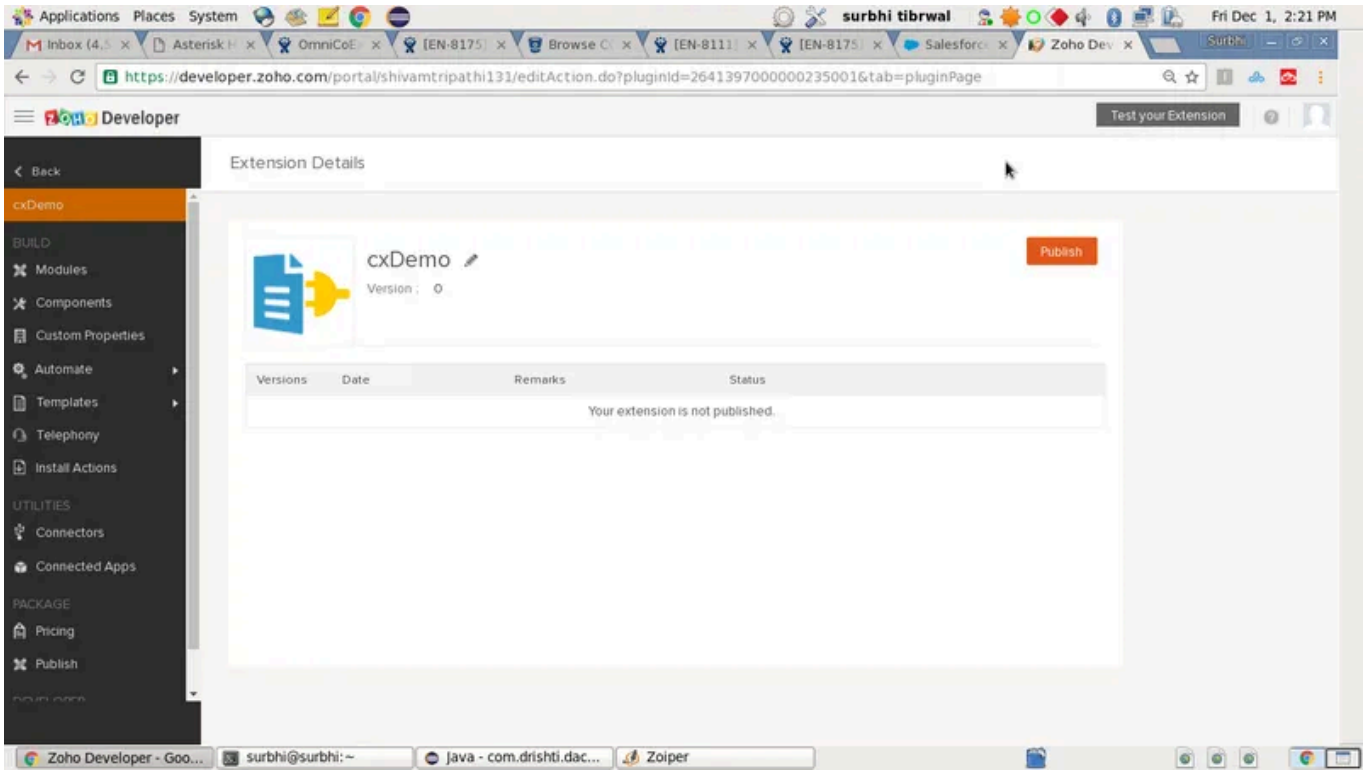
- Go to **Zoho Accounts Developer Console:** **https://accounts.zoho.com/developerconsole** to set up OAuth.
  - Use your Ameyo server domain in redirect URIs.
  - Pass the SSO Redirect URL example: **https://qanode10.ameyo.com:8443/ameyowebaccess/_callback**
  - Pass the OAuth CRM Redirect URL example: **https://qanode10.ameyo.com:8443/oauth/crm**

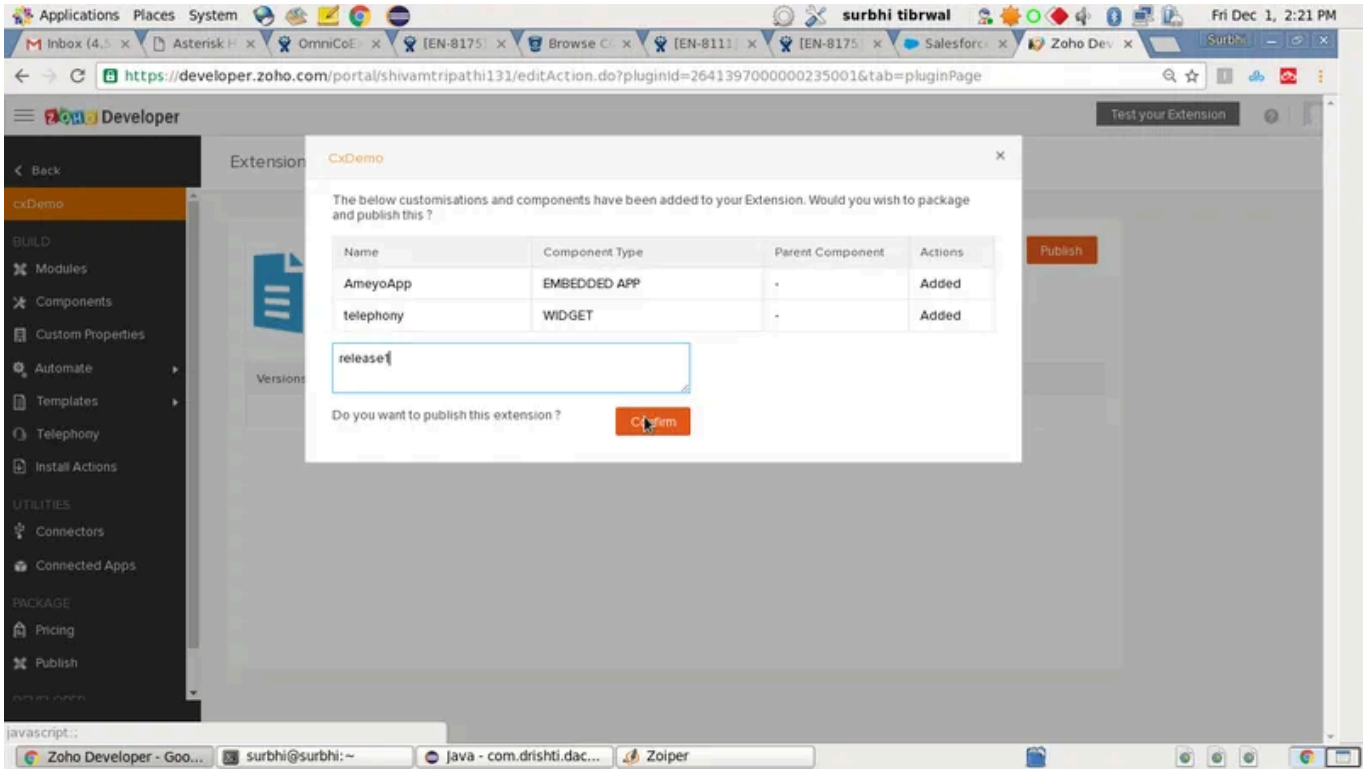




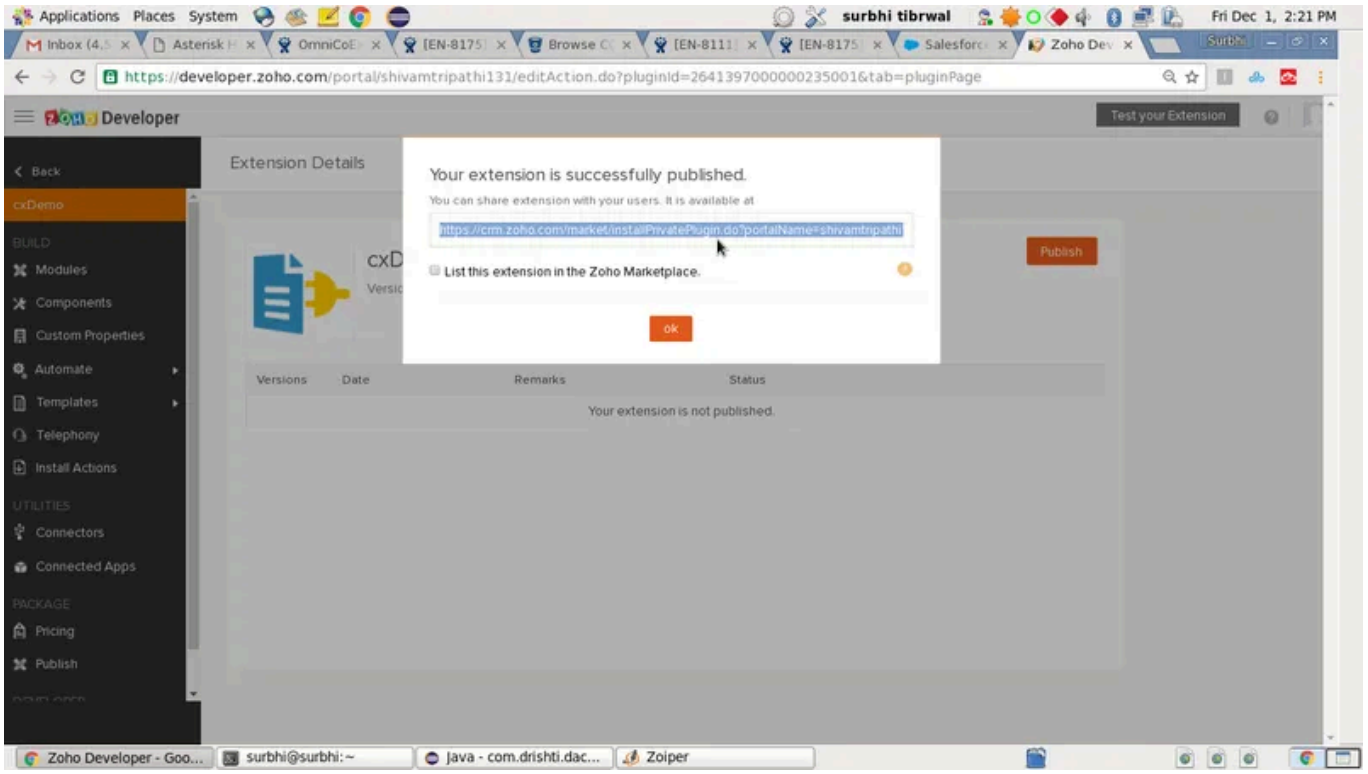
3. **Extension Publishing and Installation**

- Publish the extension and note the generated URL.





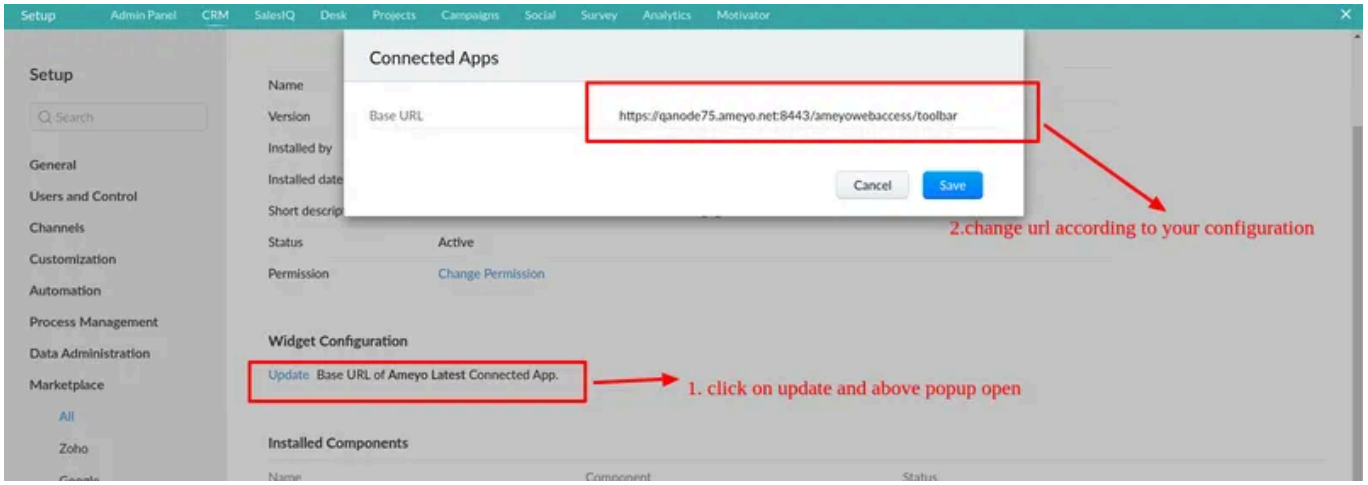
- Now you will get the URL as shown in the screenshot and click on OK.



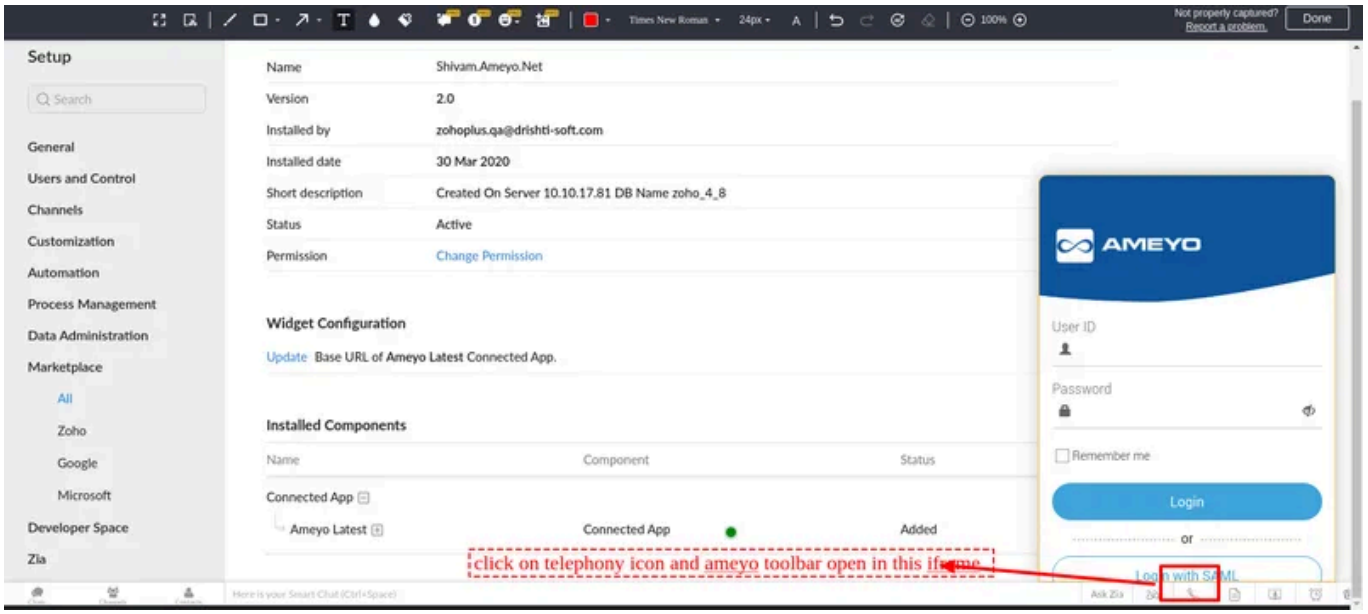
- Open the published extension URL in a separate browser tab.
- Install it on Zoho Marketplace; uninstall any conflicting CRM extension beforehand.

4. **Extension Activation**

- Go to the Zoho CRM Settings Extensions page (adjust the URL for your server) and activate the extension.
  https://crmplus.zoho.com/drishtiameyo/index.do/cxapp/crm/org678879106/settings/extensions/all and change the url according to your server:



- Access the “Ameyo toolbar” via the telephony icon in Zoho.



After executing the steps mentioned in this document, there will be few configurations done at the Ameyo DB as well, for which the details will be provided by the designated project manager/engineer

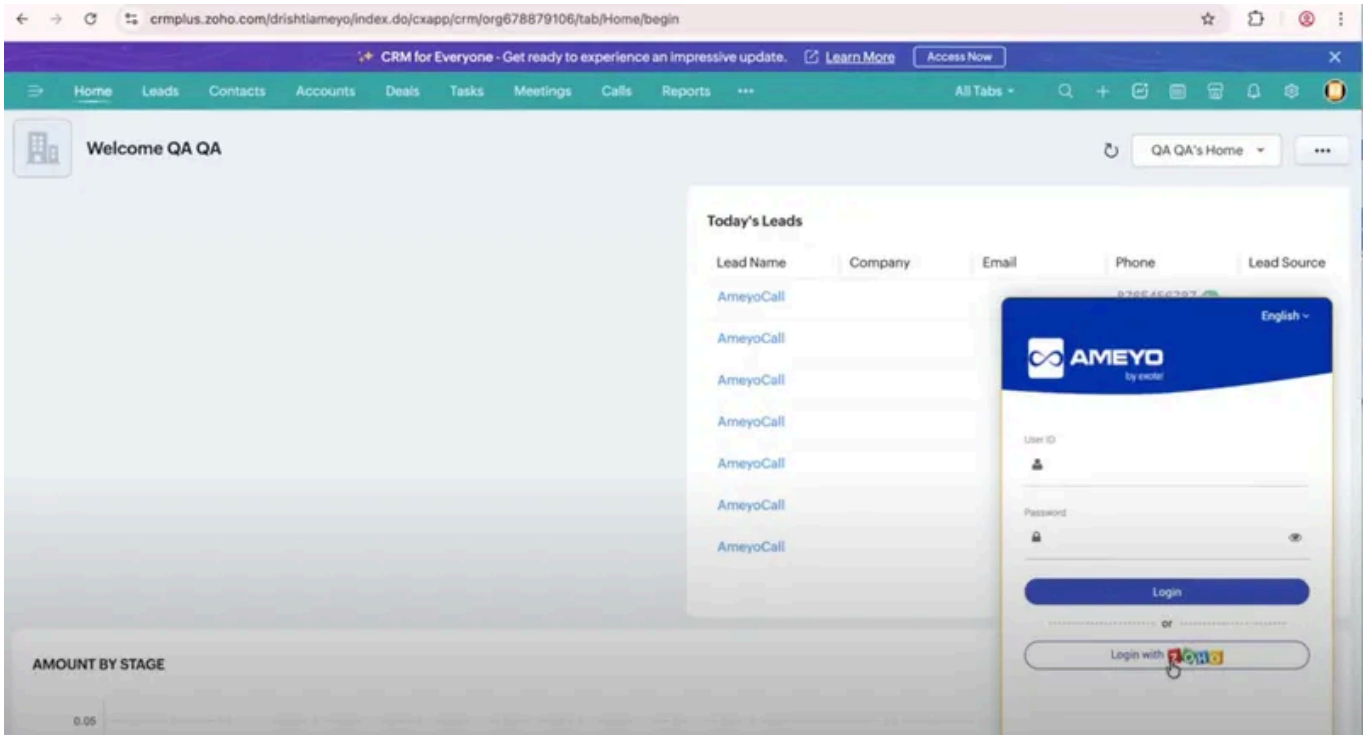
14.7.2. User Guide: Zoho CRM

Objective: To successfully authorize the Ameyo application, configure your extension, and access the dialer interface within the Zoho CRM Toolbar.

Instructions

Step 1: Launch the Login Process

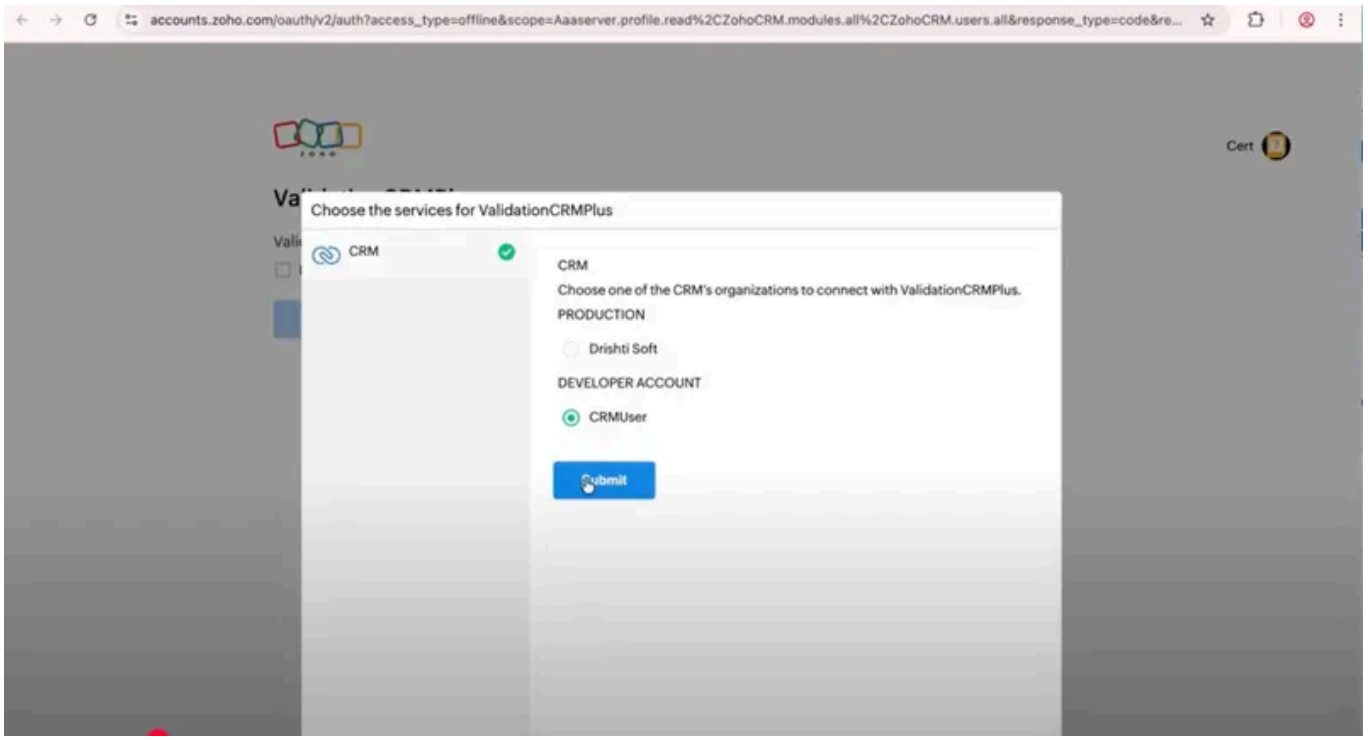
1. Navigate to your Zoho CRM Home screen.
2. Locate the **Ameyo Toolbar** on the right-hand side of the screen.
3. Click the blue **Login** button.



Step 2: Authorize Services

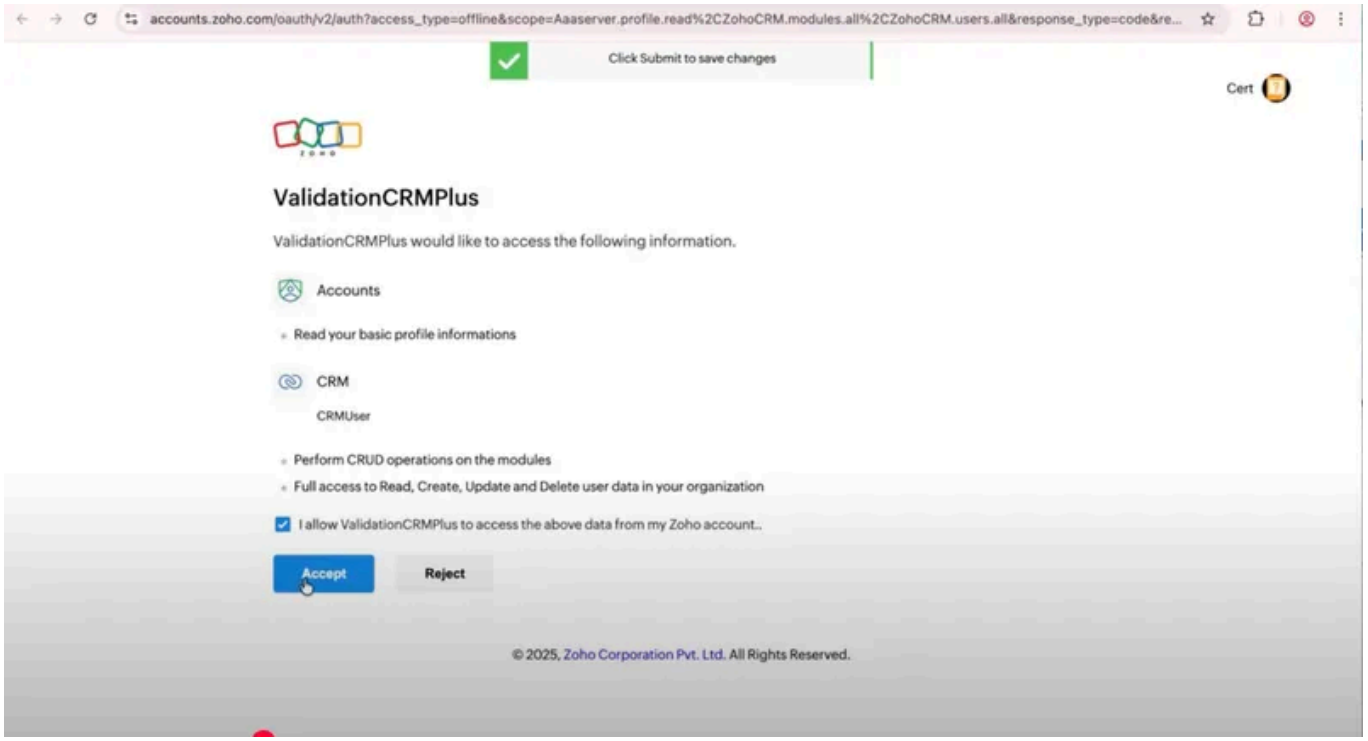
1. A pop-up window will appear for authorization.
2. Select your organization/profile (e.g., **CRMUser**).
3. Click **Submit**.

Selecr the organisation profile if there are multiple



Step 3: Grant Permissions

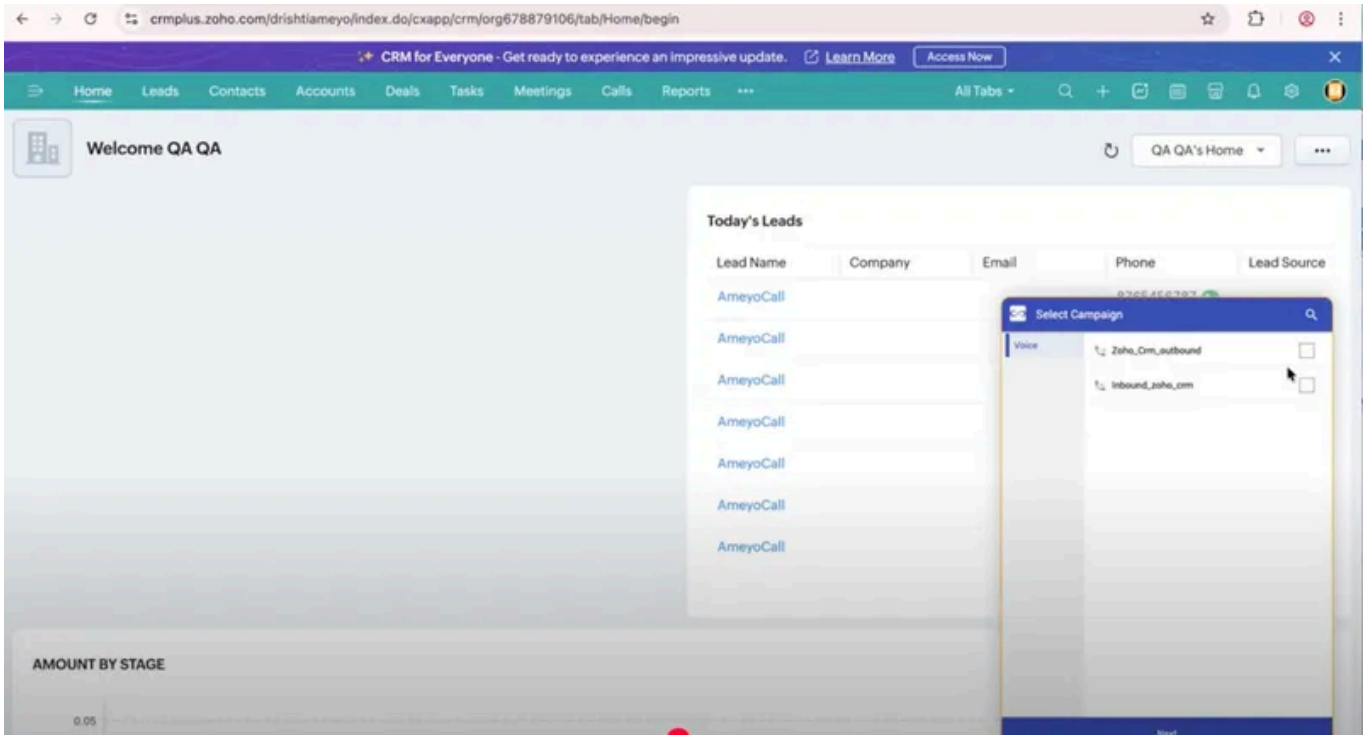
1. The system will request access to your Zoho Account data.
2. Click the blue **Accept** button. The pop-up will close automatically.



Step 4: Select Campaign

1. Back in the Toolbar, a campaign list will load.
2. Check the box next to your assigned campaign (e.g., **Daha_crm_outbound**).

3. Click the arrow icon to proceed.

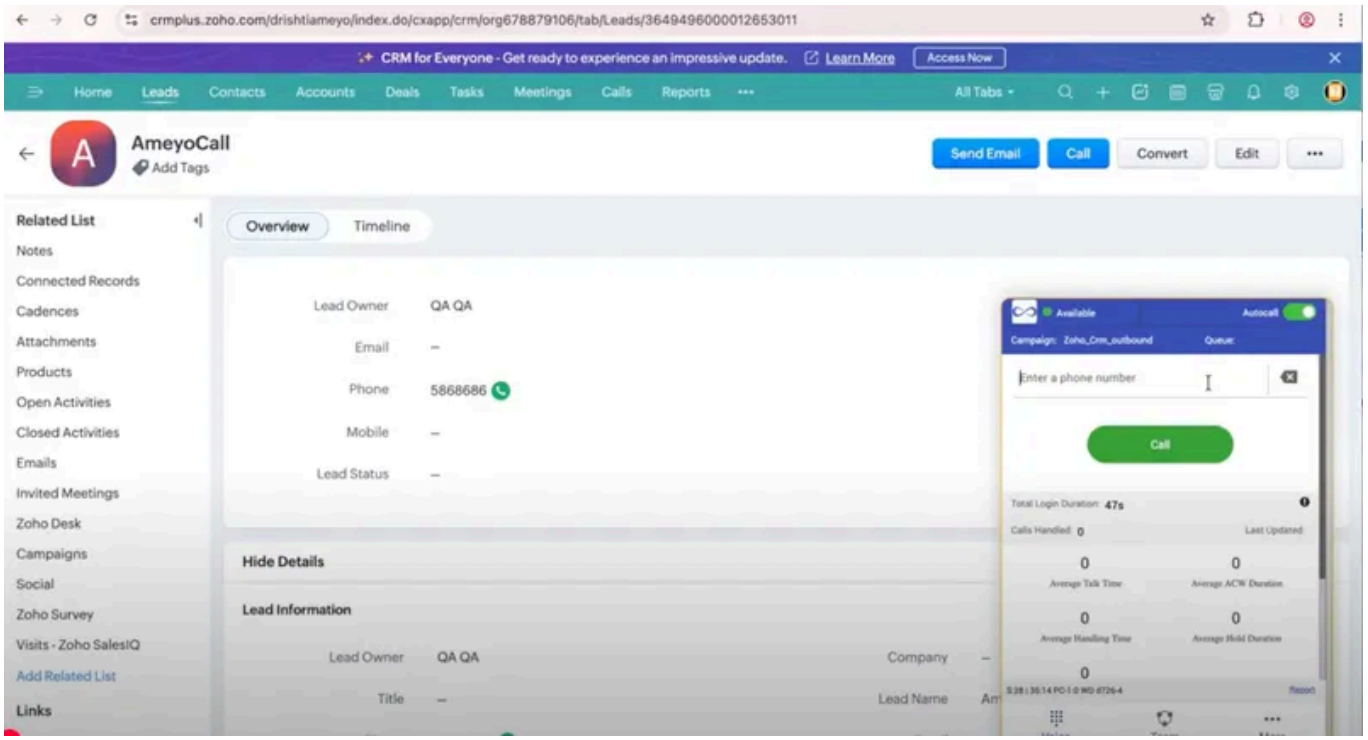


Step 5: Configure Extension

1. **Select an option:** Choose your extension profile if webRtc is not enabled
2. **Phone Number:** Enter the phone number for this session only if webRtc is not enabled.
3. Click the arrow/submit button.

Step 6: Toolbar Active State

1. You are now successfully logged in.
2. The Toolbar displays your current status (e.g., **Available**) and call statistics.
3. You can now use the dialer input box to initiate calls.



Managing Calls via Ameyo Toolbar

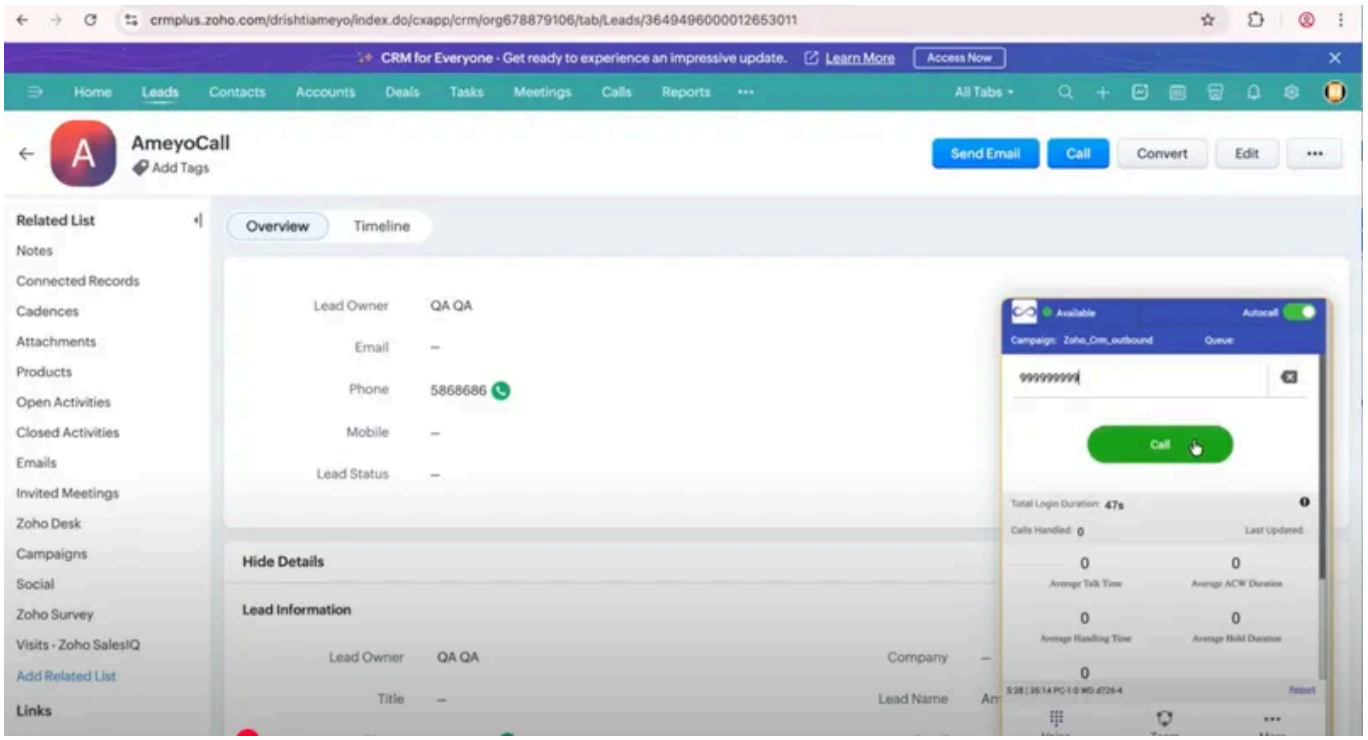
Objective: Learn how to dial numbers, manage active calls, and correctly dispose of call records after hanging up using the Ameyo Toolbar in Zoho CRM.

Step 1: Call Handling

Ensure your status in the Toolbar is set to **Available for auto Calls**.

Scenario A: Initiating an Outbound Call

1. **Enter Number:** In the Toolbar input field, type the customer's phone number (e.g., 9999999999).
2. **Dial:** Click the green **Call** button.
3. **Connect:** Your extension will trigger to connect the audio line.

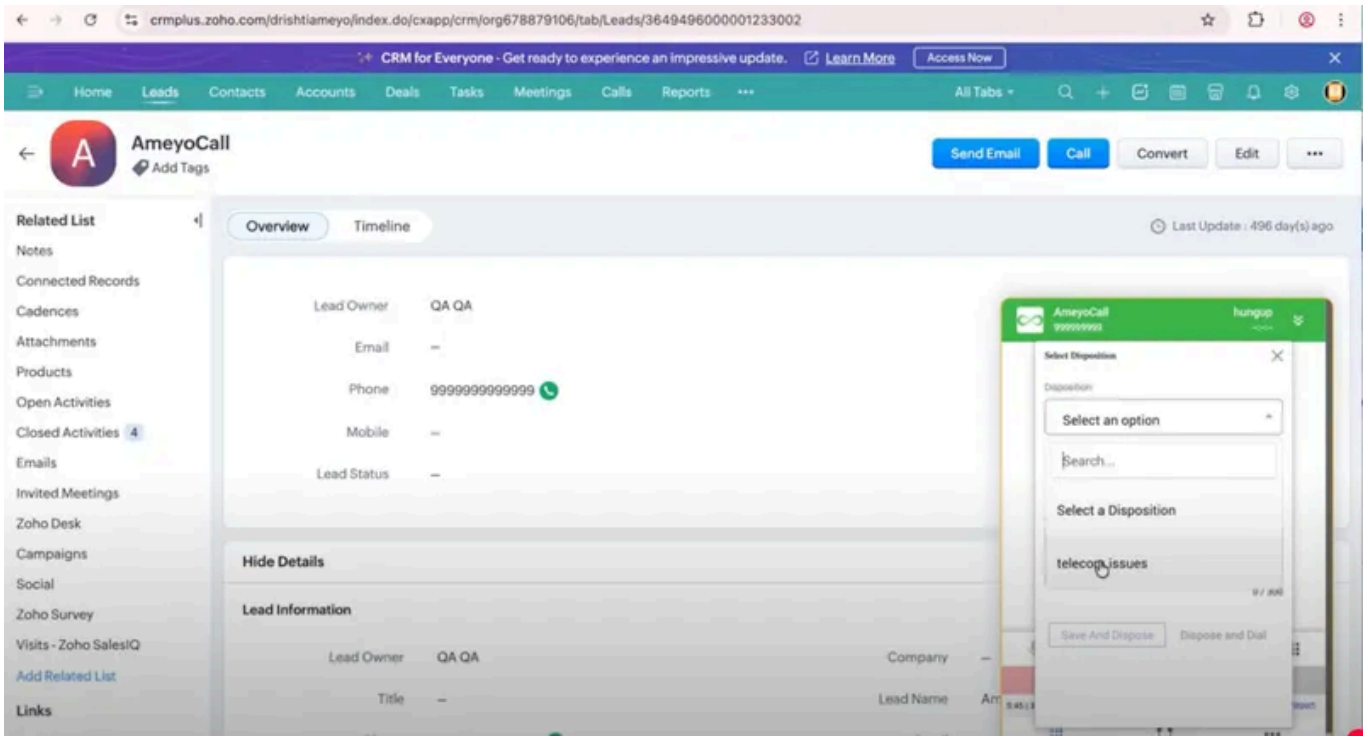


Scenario B: Receiving an Inbound Call

1. **Notification:** When a call arrives, your extension (webRtc / phone) will get a call.
2. **Answer:** Accept the call via your extension or the answer button on the Toolbar (if configured).
3. **CRM Pop-up:** The CRM will automatically pull up the customer's record if the phone number matches an existing Lead or Contact.

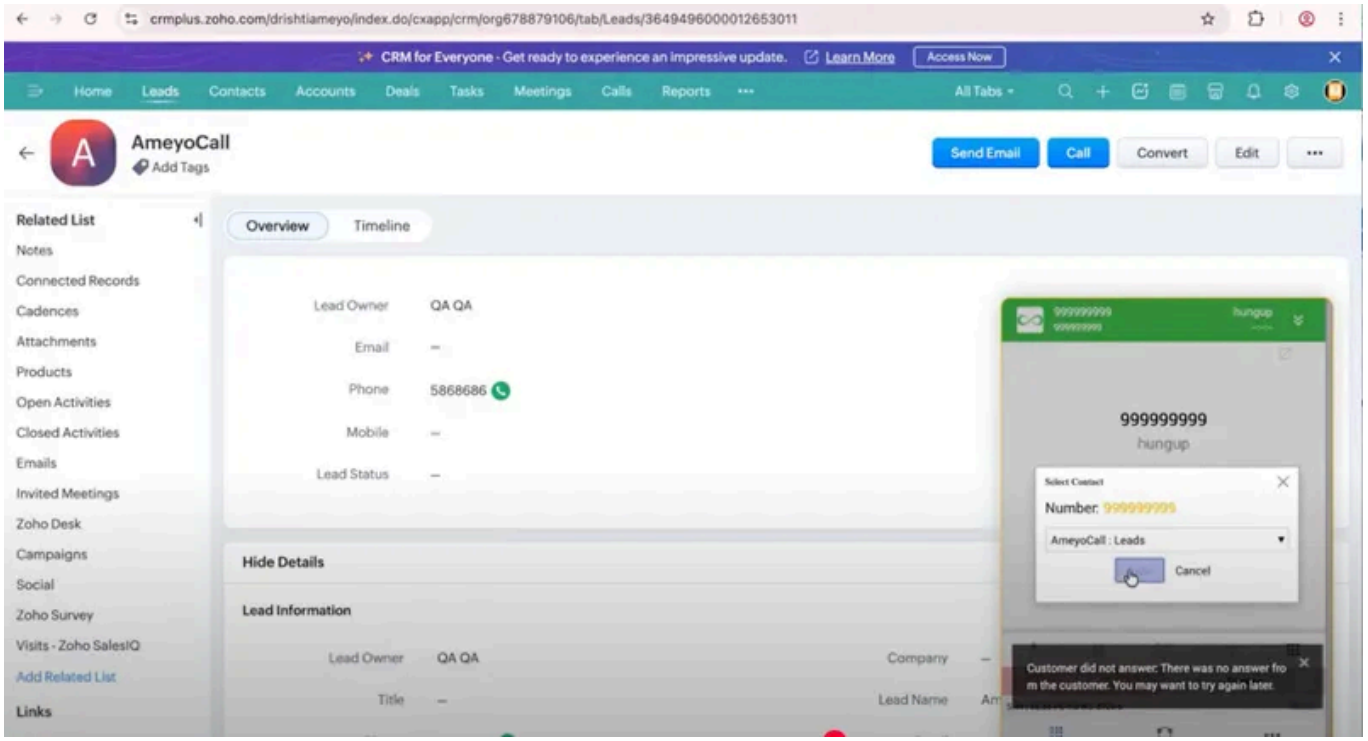
During the Call & Termination

1. **Active State:** While talking, the Toolbar status updates to indicate you are "Busy" or "On Call."
2. **End Call:** To finish the conversation, click the red **Hangup** button on the Toolbar or the end-call button on your softphone.
3. **Post-Call:** Proceed immediately to the **Disposition** window to categorize the call



Step 3: Associate Contact Record

1. Immediately after the call ends, a **"Select Contact"** pop-up may appear if the number matches a record in Zoho CRM.
2. Confirm the correct Lead or Contact is selected.
3. Click **View** to open the customer's record details or **Cancel** to proceed without viewing.



Step 5: Return to Available State

1. Once the disposition is saved, the Toolbar automatically resets.
2. Your status returns to **Available**, making you ready for the next call.
3. The **Calls Handled** counter will increment to reflect the completed call.

14.8. Zoho Desk Toolbar Integration with Ameyo

Overview

This document provides instructions for integrating the Ameyo toolbar within the Zoho Desk interface. This integration enables agents to manage customer interactions using Ameyo's telephony features directly within their Zoho Desk helpdesk environment.

Key Benefits:

- **Unified Workspace:** Access Ameyo calling features without leaving the Zoho Desk application.
- **Contextual Screen-Pop:** Automatically display relevant Zoho Desk contact information upon receiving or initiating calls.
- **Click-to-Dial:** Initiate calls directly from Zoho Desk records.
- **Automated Activity Logging:** Automatically log call details, voice recordings, and dispositions against corresponding Zoho Desk records.

Functionality

The integration embeds the Ameyo toolbar as a private app within Zoho Desk, accessible via an icon typically located in the bottom right. Upon agent login to the toolbar, it provides telephony controls. When a call occurs, the integration searches Zoho Desk based on the phone number to display associated contacts (screen-pop). Click-to-dial can be initiated from Zoho Desk. Call activities, including dispositions and optional voice logs, are automatically pushed to Zoho Desk records either client-side or server-side (via post-processing node flow), depending on configuration. OAuth 2.0 is used for secure authorization between Ameyo and Zoho Desk APIs.

Prerequisites

- Active Ameyo account.
- Active Zoho Desk account with administrator privileges.

- Zoho Developer Console access (https://accounts.zoho.com/developerconsole or regional equivalent like .in) to create OAuth Client ID/Secret.
- The Ameyo private app package for Zoho Desk (ameyo.zip).
- Network connectivity between Ameyo servers and Zoho Desk.

14.8.1. Zoho Desk App Creation and Installation Guide

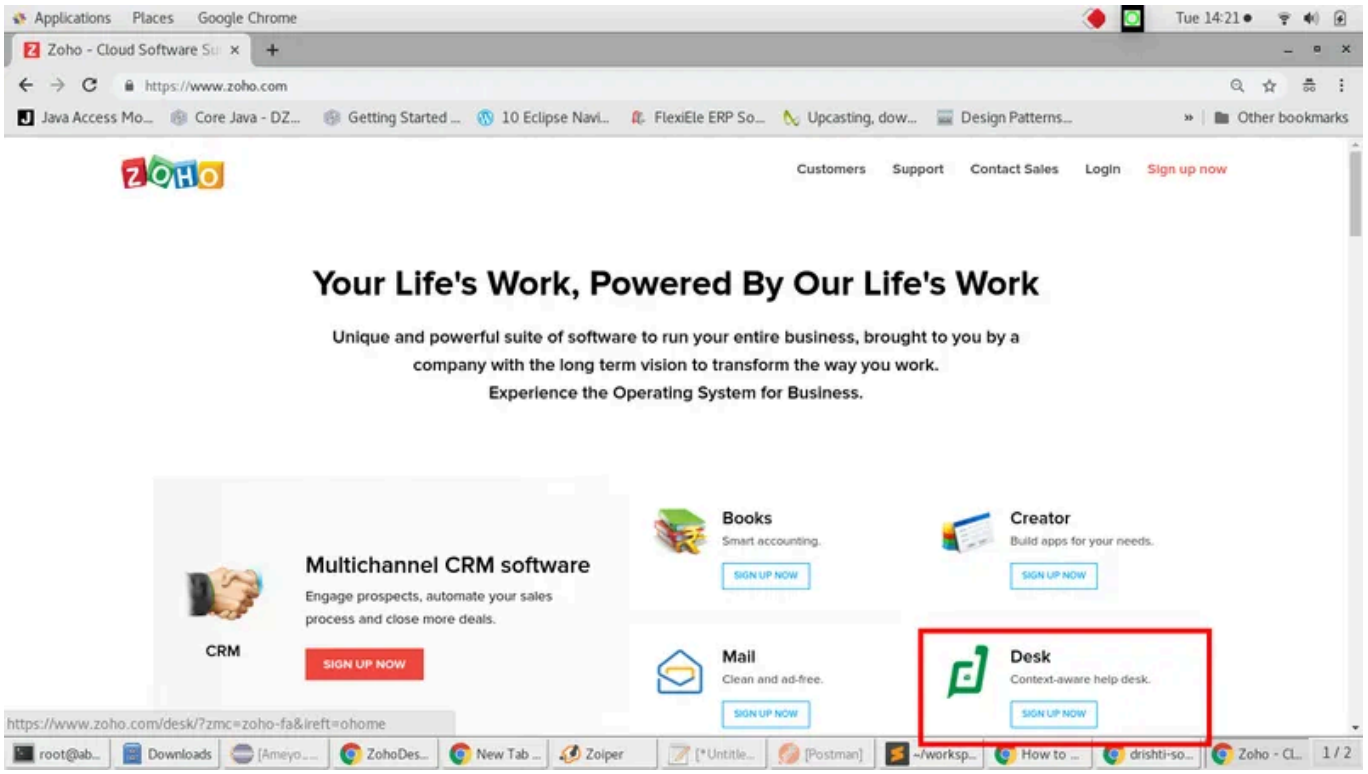
Overview

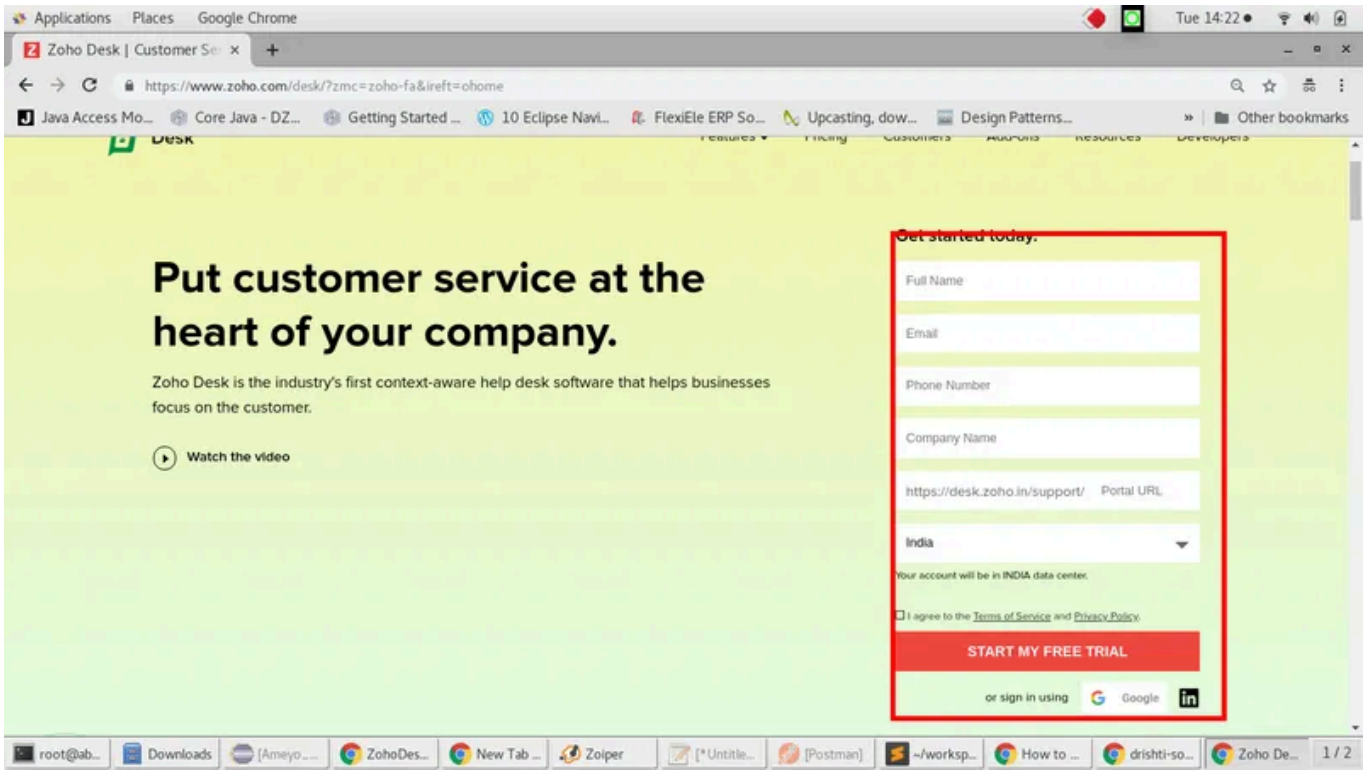
This document serves as a guide to configure (for the 4.7 release and above) the Zoho Widget App at Zoho application's end. Please follow all the steps for the configuration given below.

Usage Instructions

Step 1. Create Zoho Desk Account:

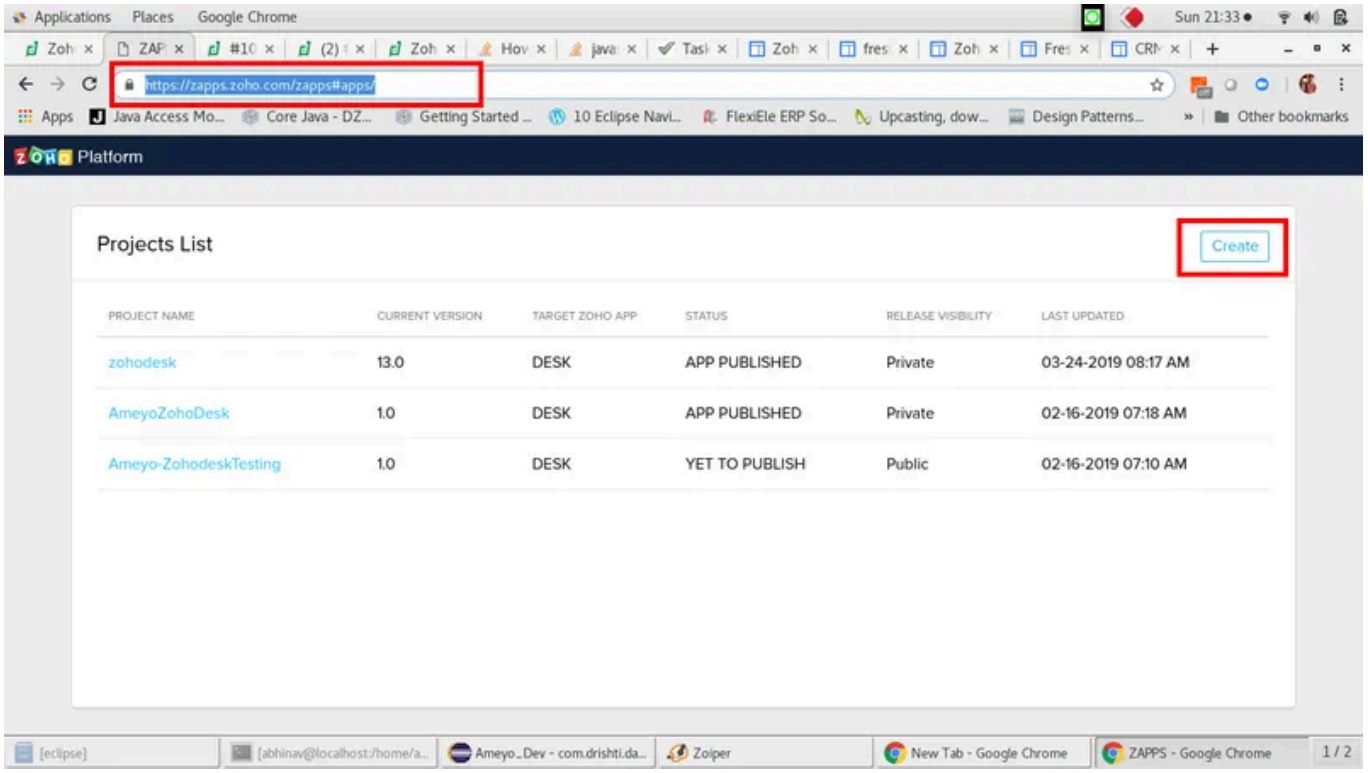
- Go to https://www.zoho.com and select **Desk**.
- Sign up, fill in the required details, and validate the account via used email Id.



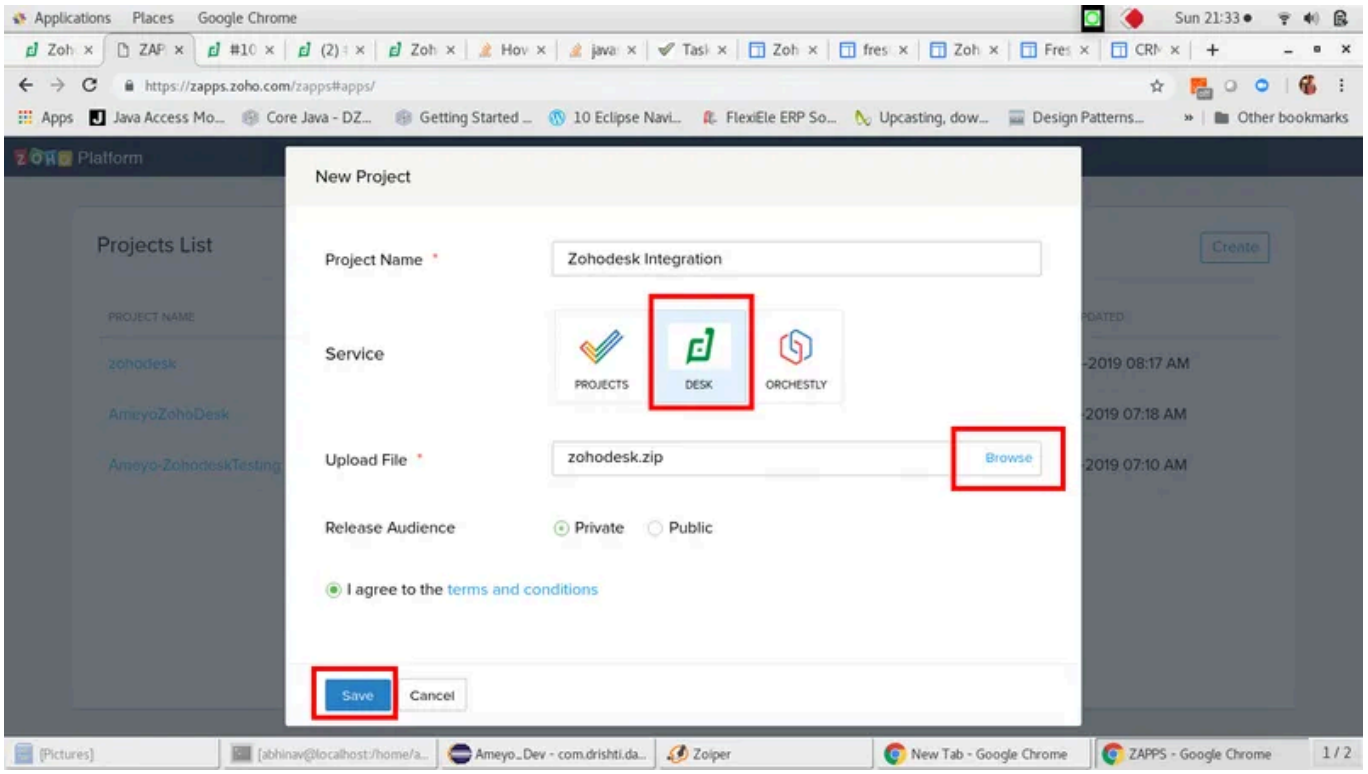


Step 2. Uploading Private App

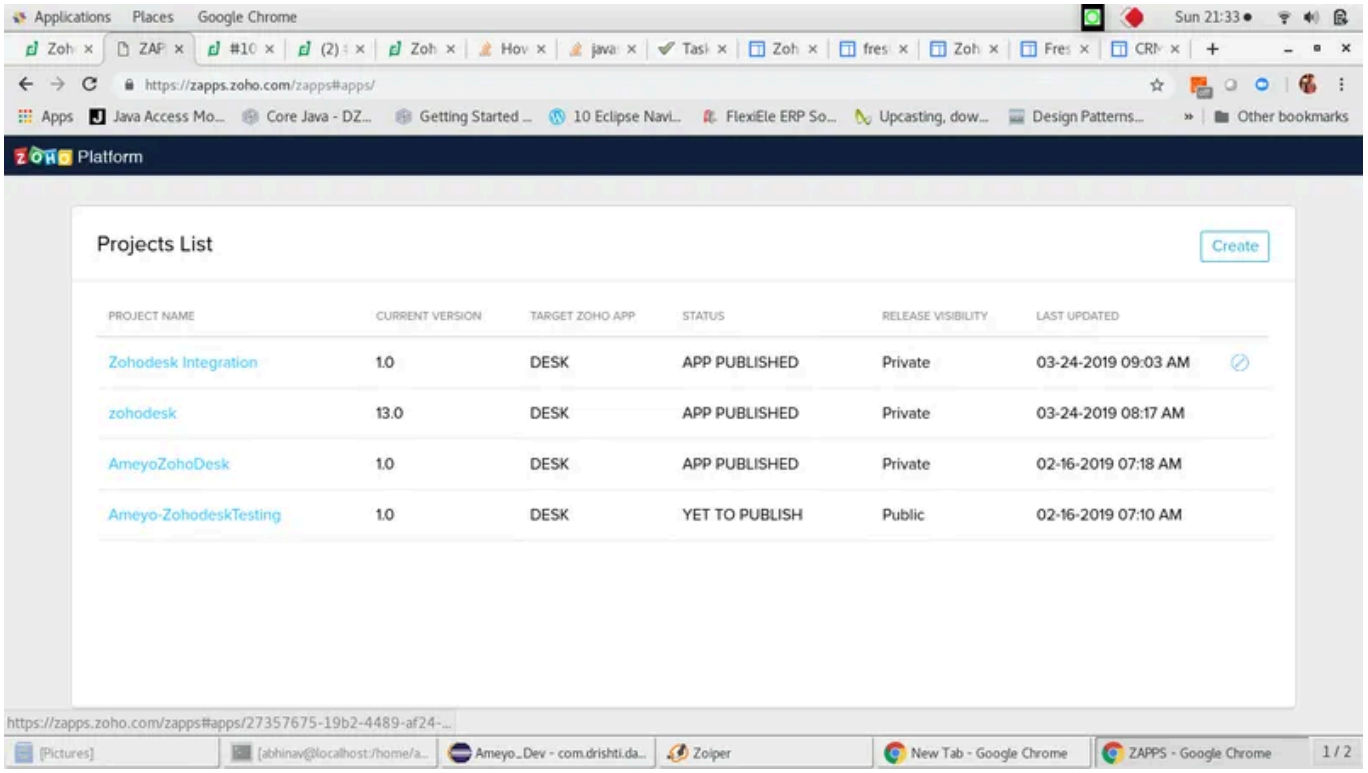
- Goto zohodesk app page https://zapps.zoho.com/zapps#apps
- Click on Create Button

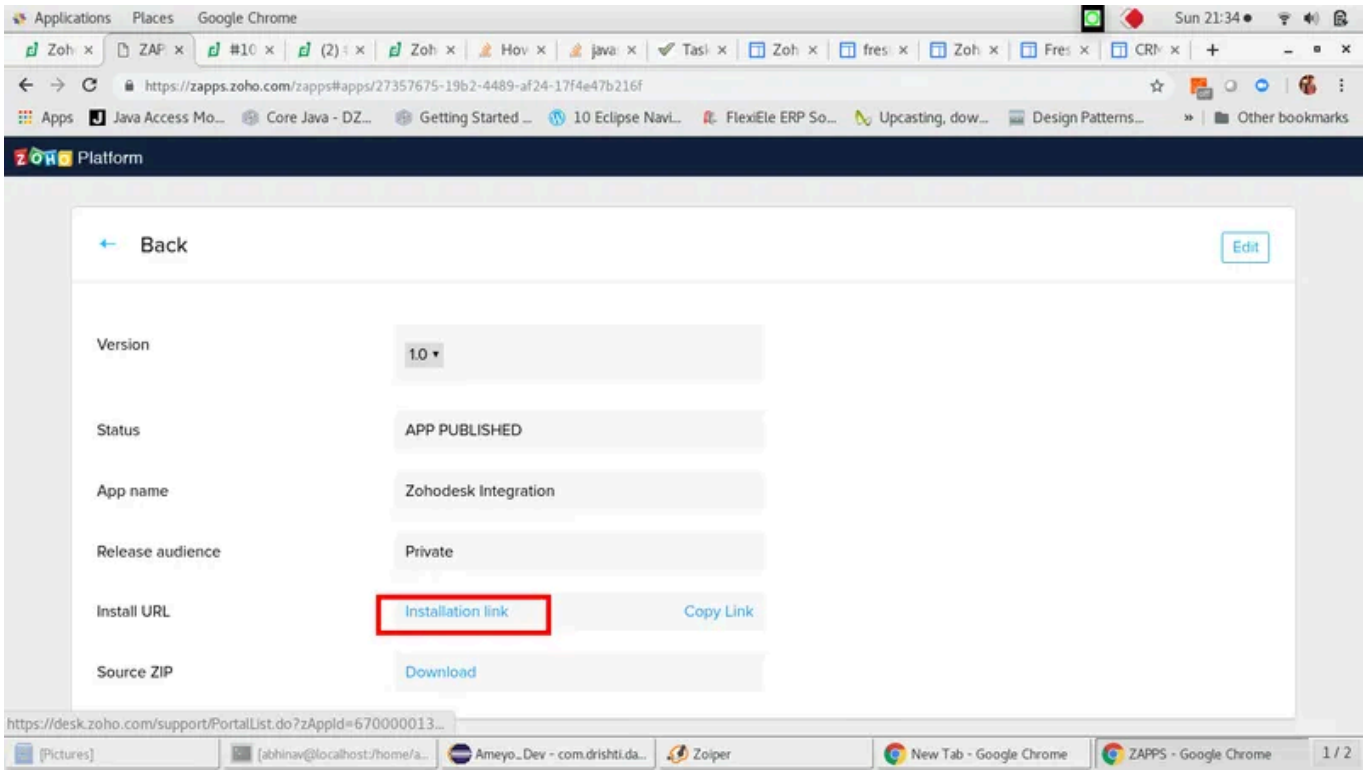


- Upload the Zohodesk App(attached Zip)- **ameyo.zip**, Select Desk, agree the agreement and click on save button

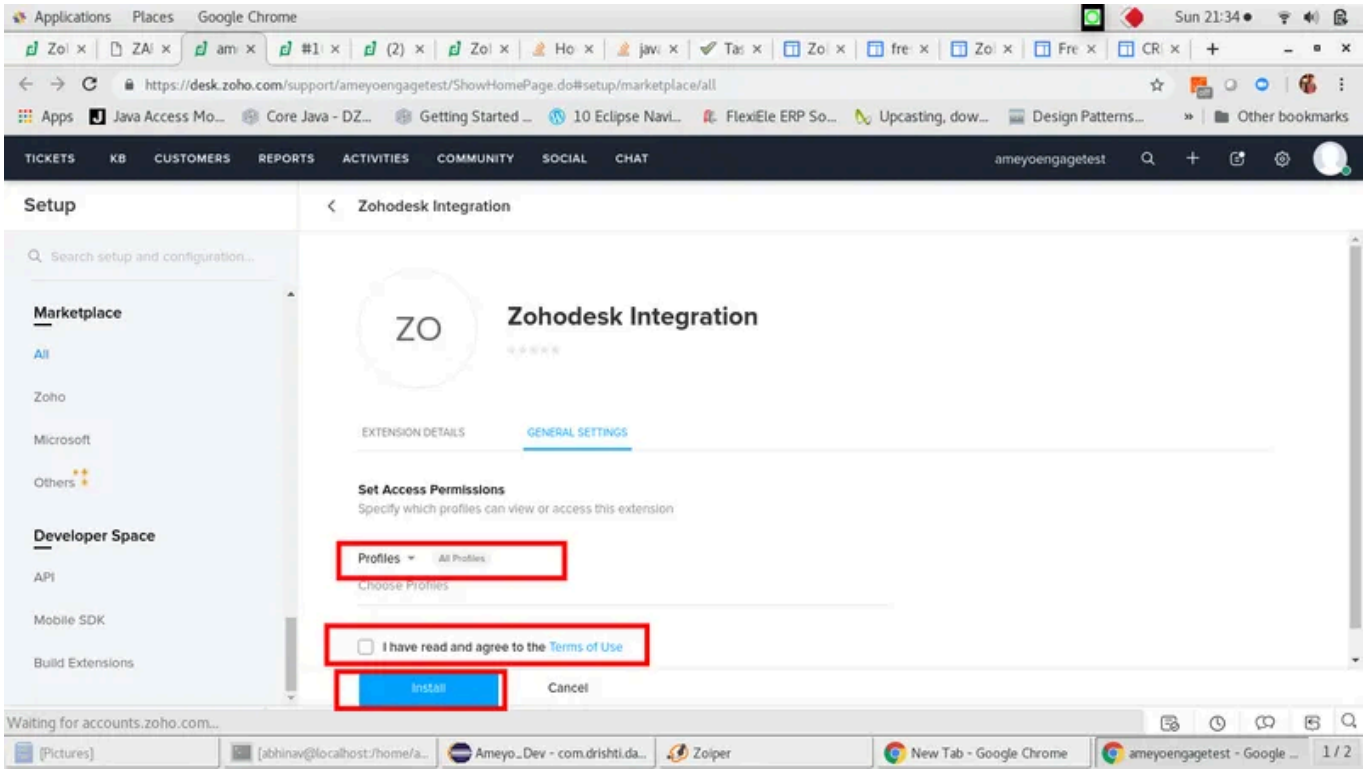


- Click on the App you uploaded from the list, and than click on **Installation link.**

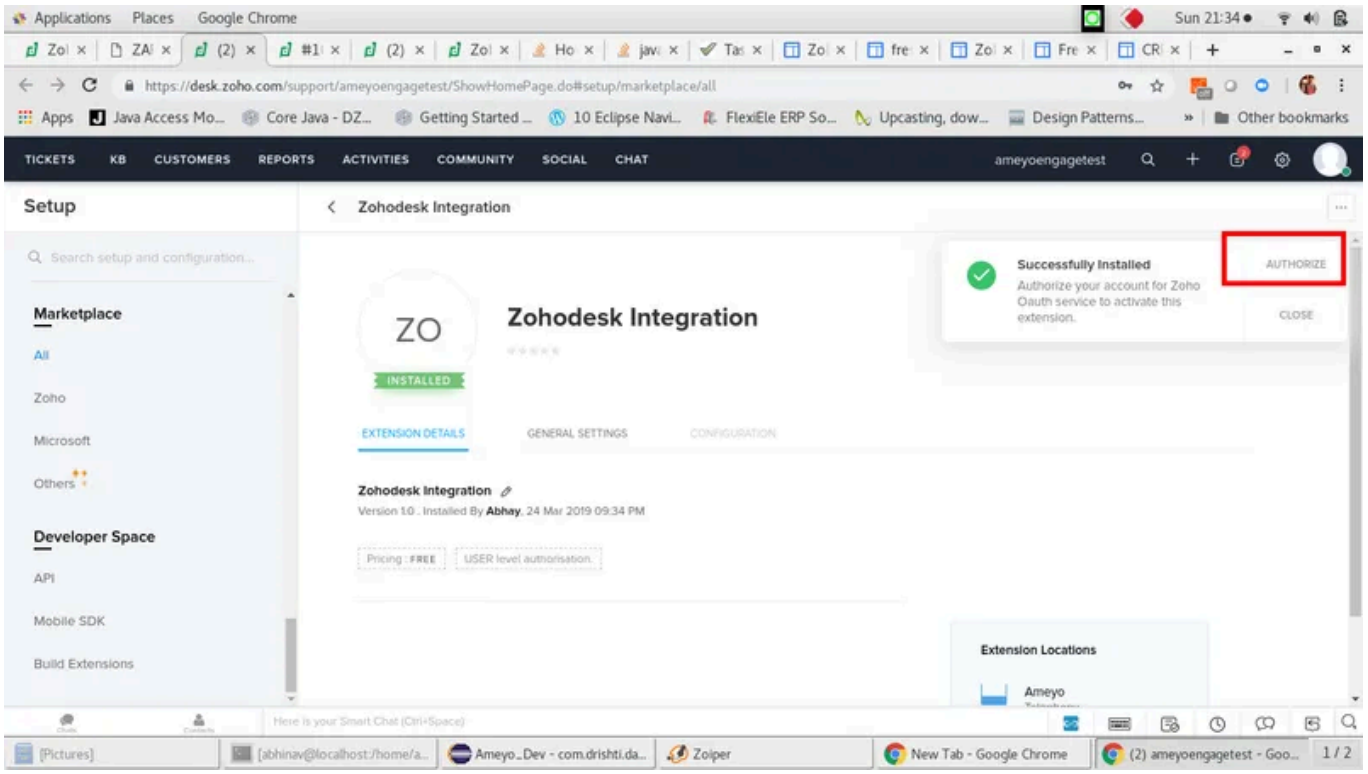




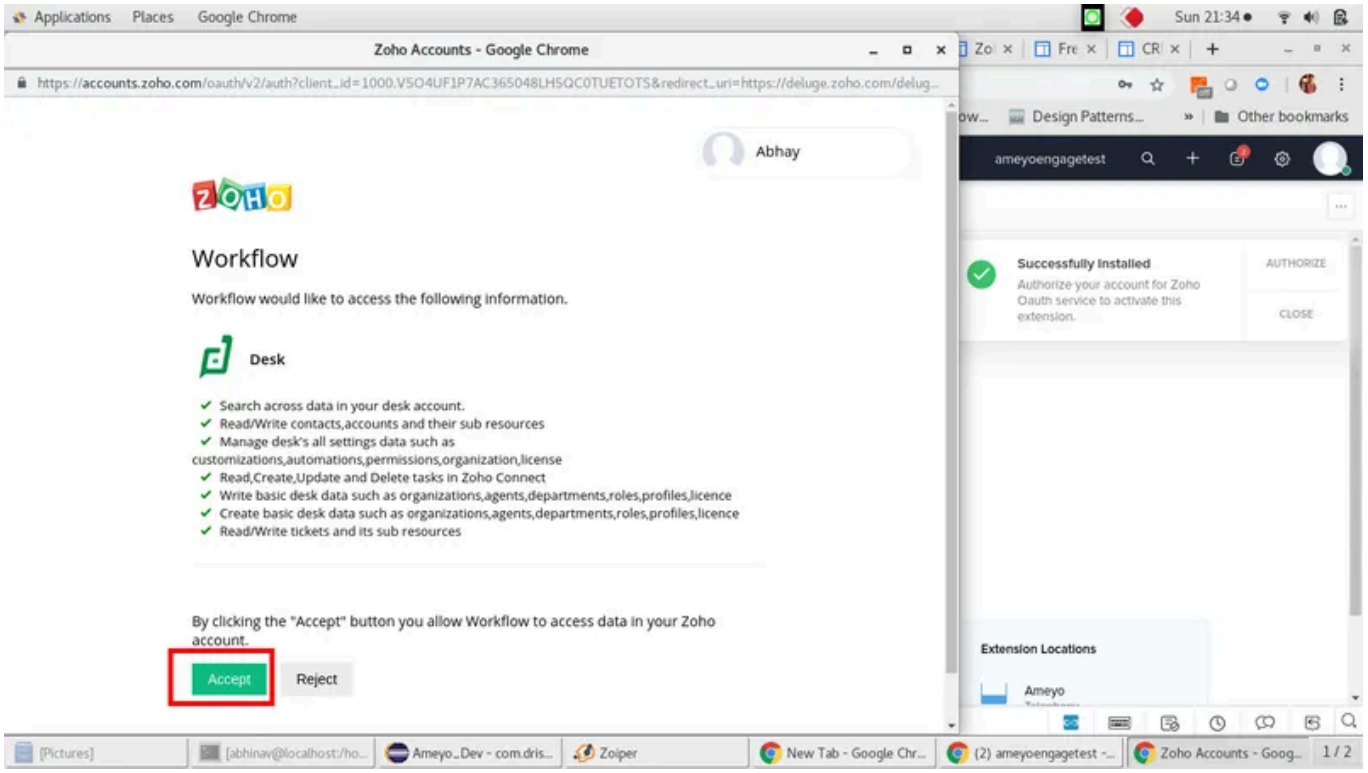
- Select Profile, agree the agreement and Install the app.



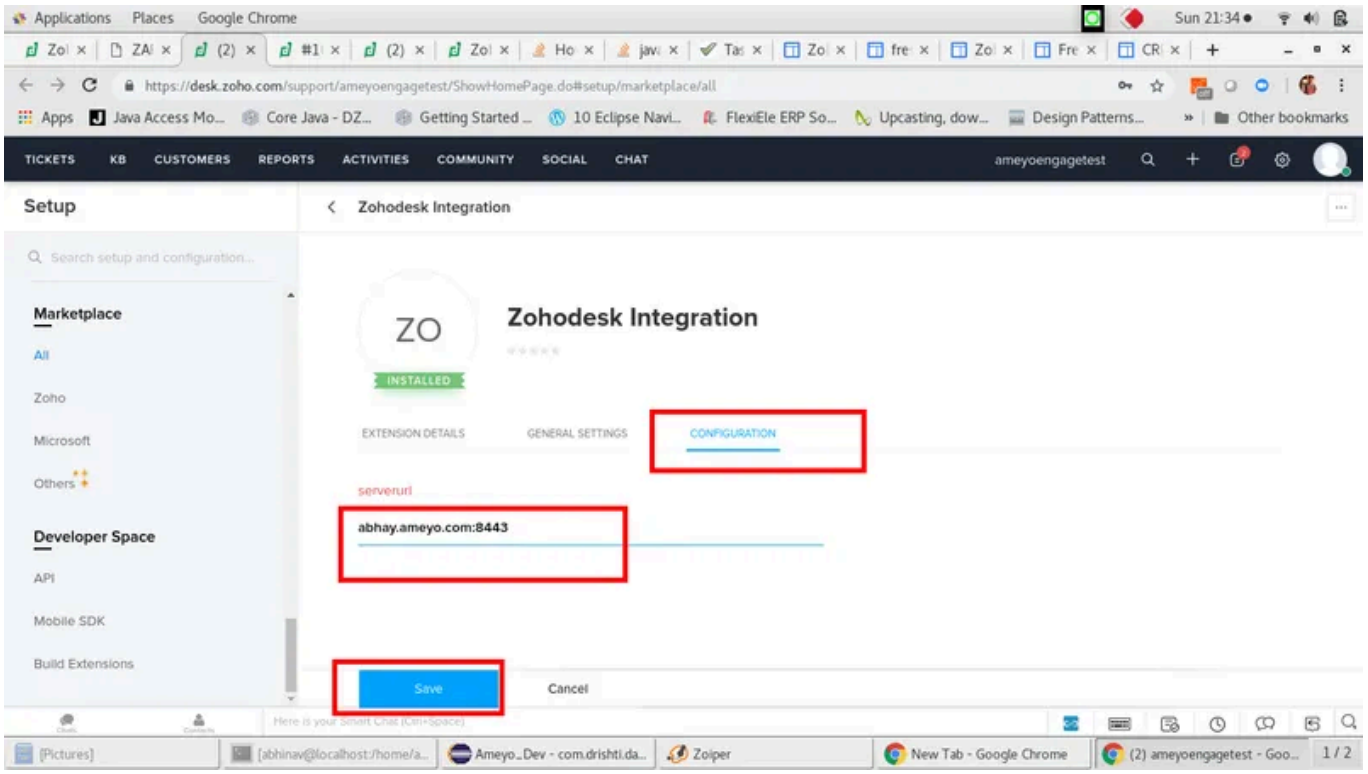
- After Installation you will be asked to authorize the app. Click on Authorize Button.



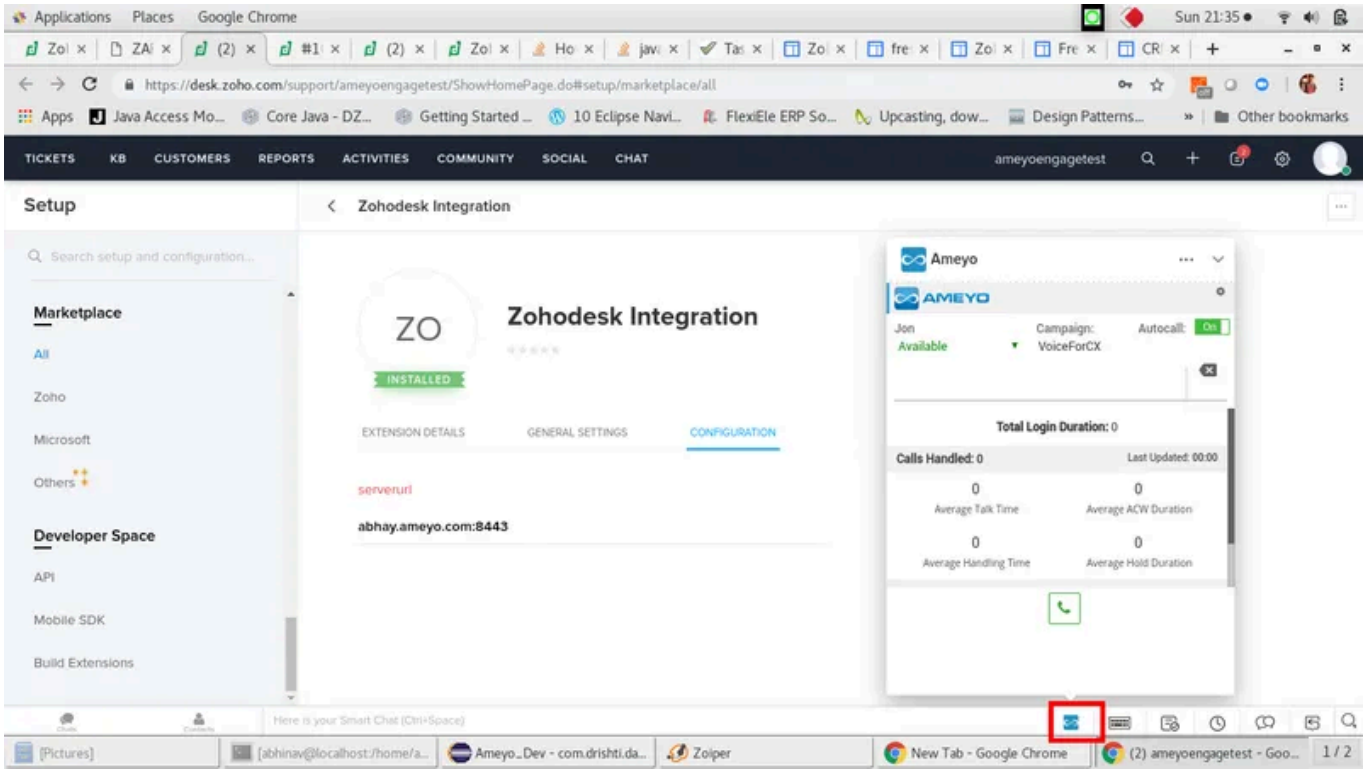
- Click On Accept Button



- Click on Configuration tab and enter your Ameyo Server URL. And Save the configuration.



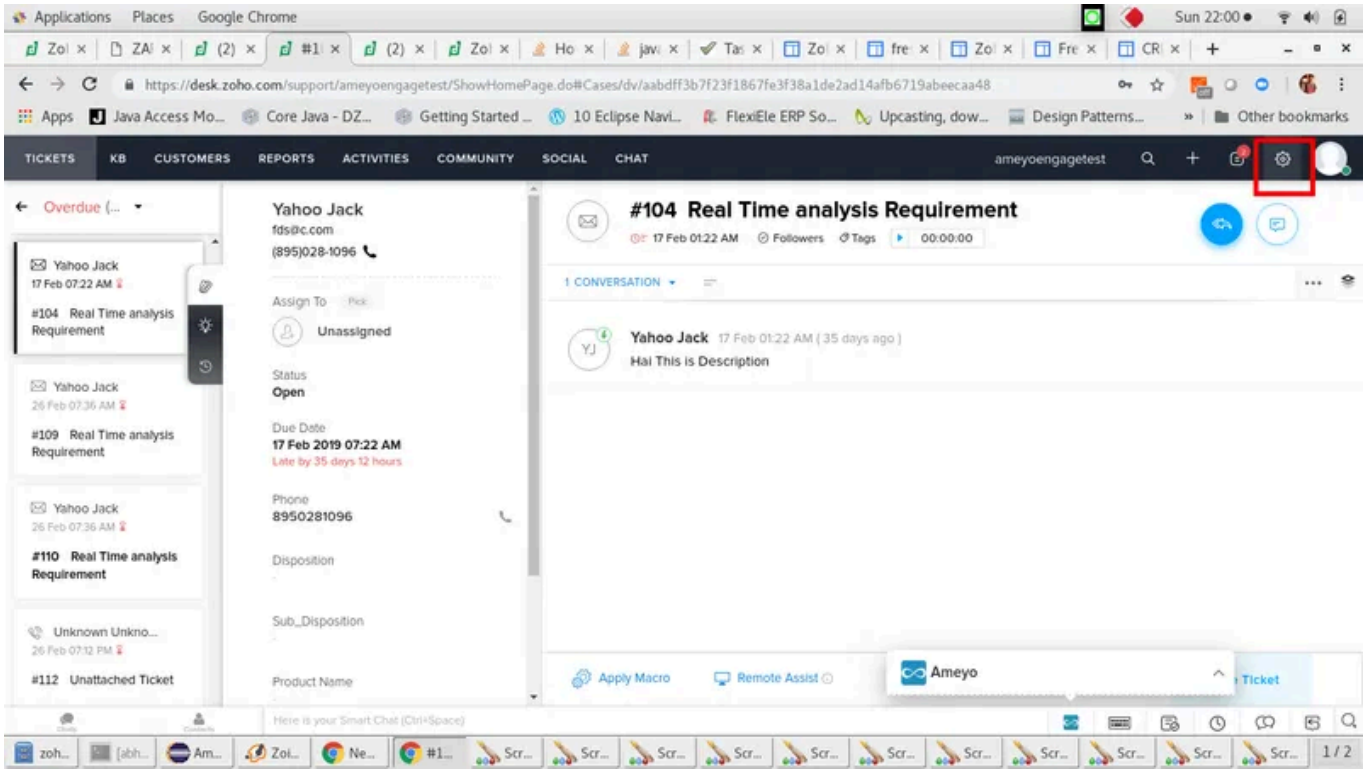
- **Hurray!!! You have successfully installed the Zohodesk App. Now you can access ameyo toolbar by clicking on Ameyo Icon at the right bottom.**



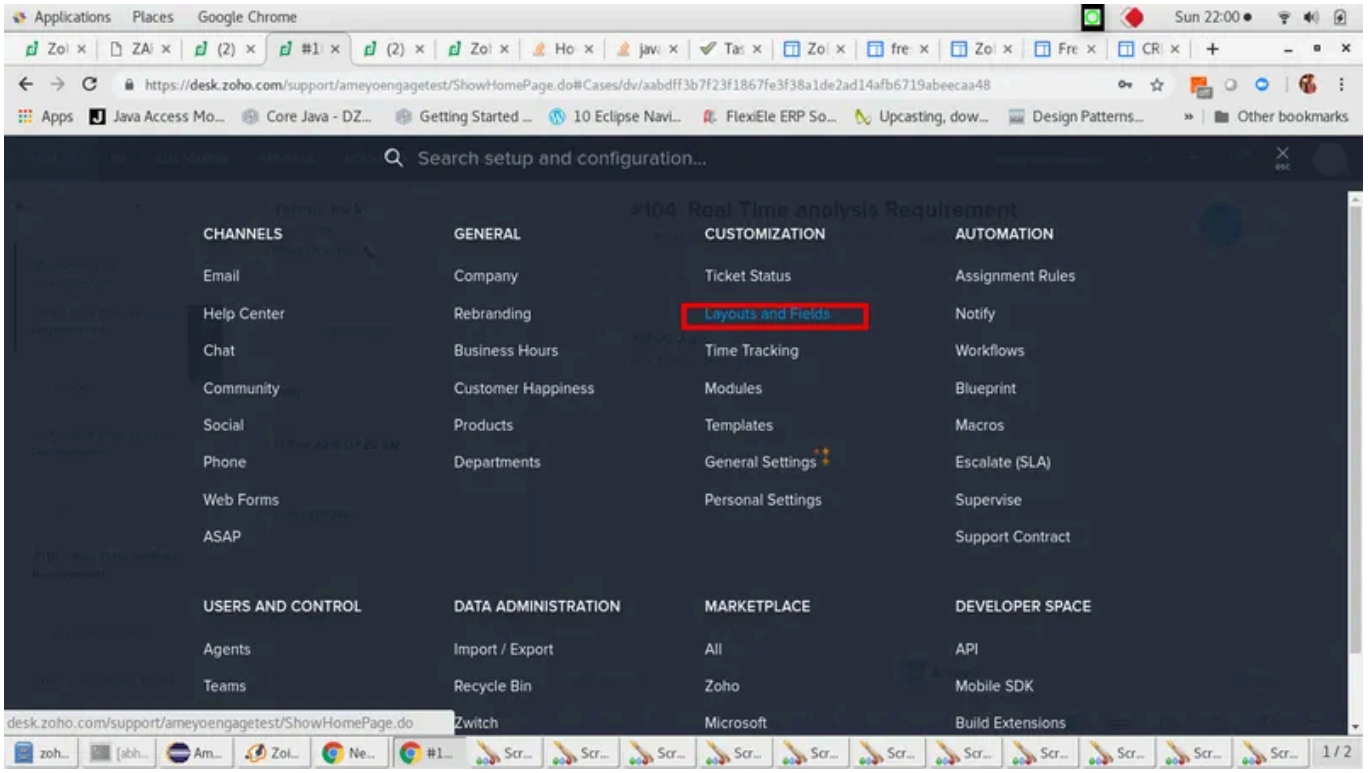
Step 3. Create Custom Fields in Zoho Desk:

- Log in to Zoho Desk as an administrator.

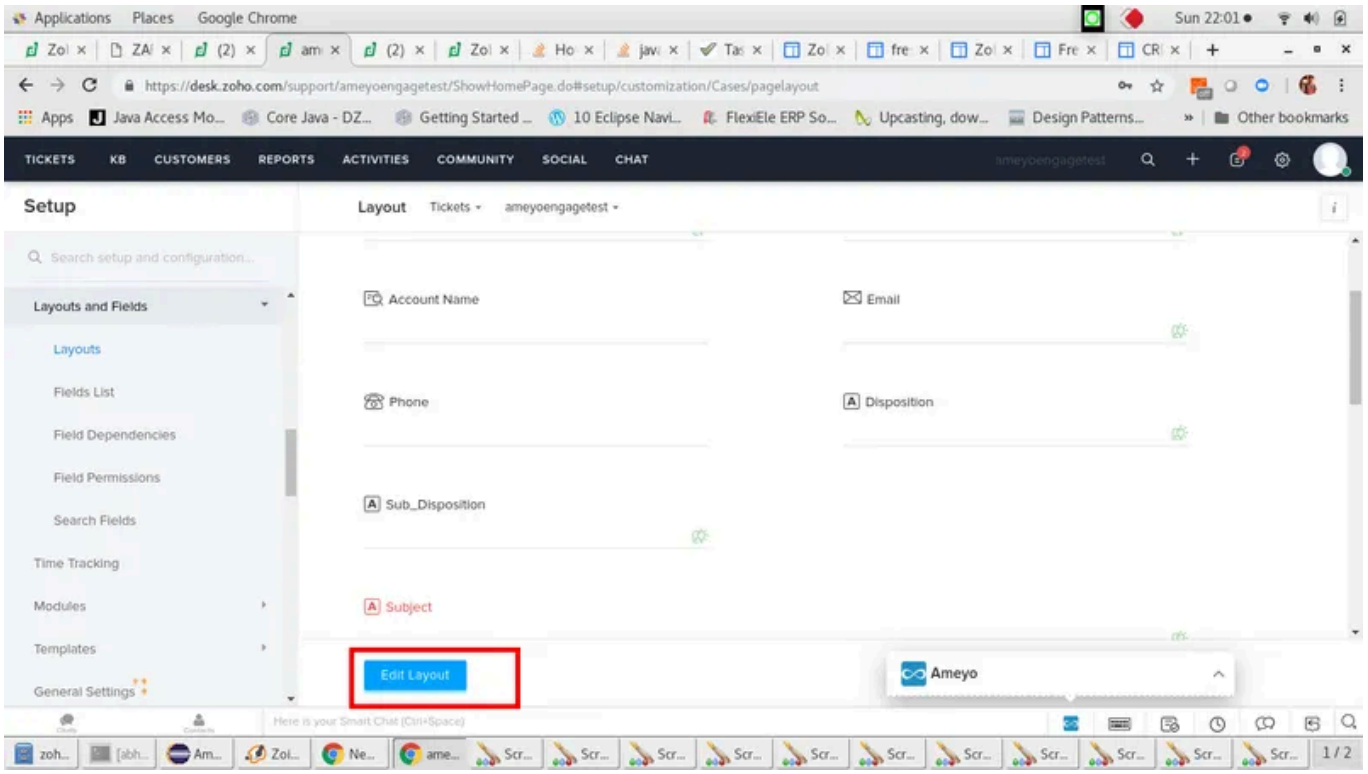
- Click the **Setup** (gear) icon.



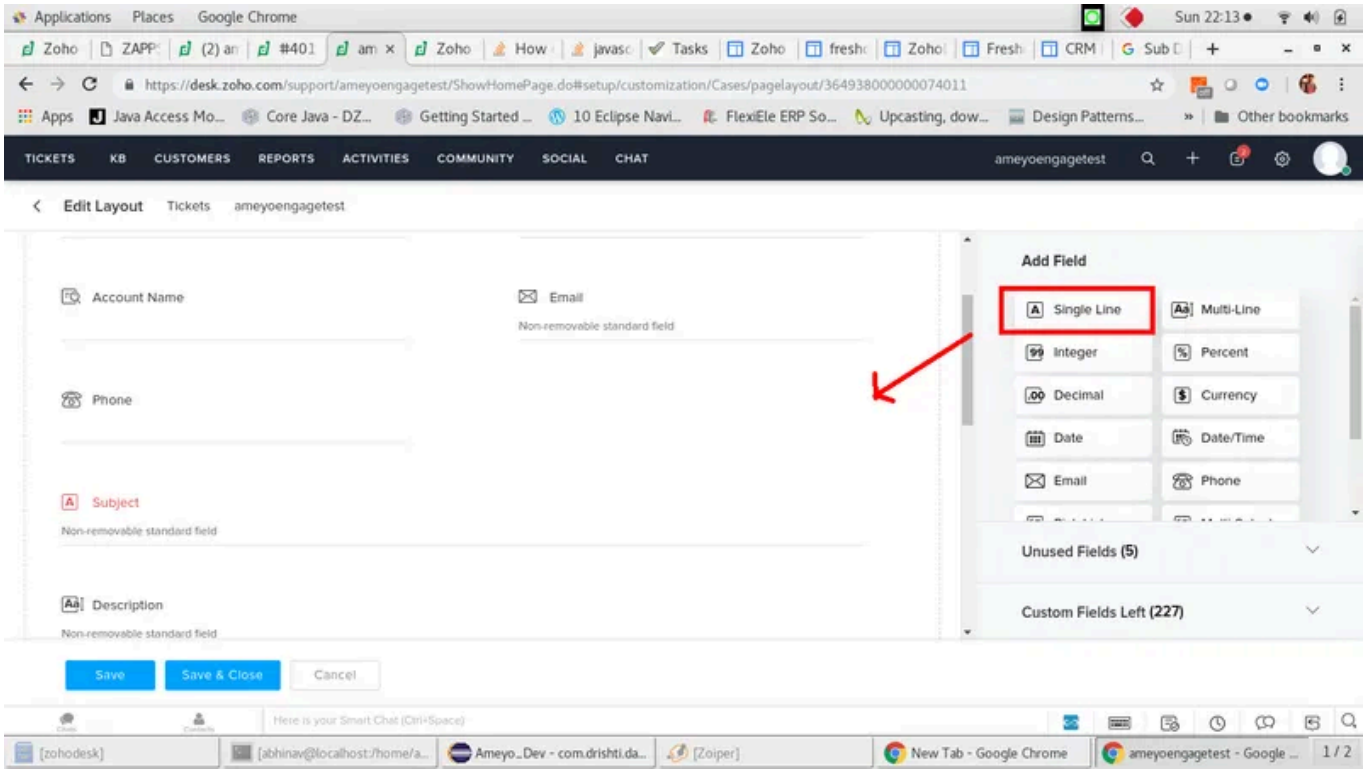
- Navigate to **Customization** > **Layouts and Fields**.

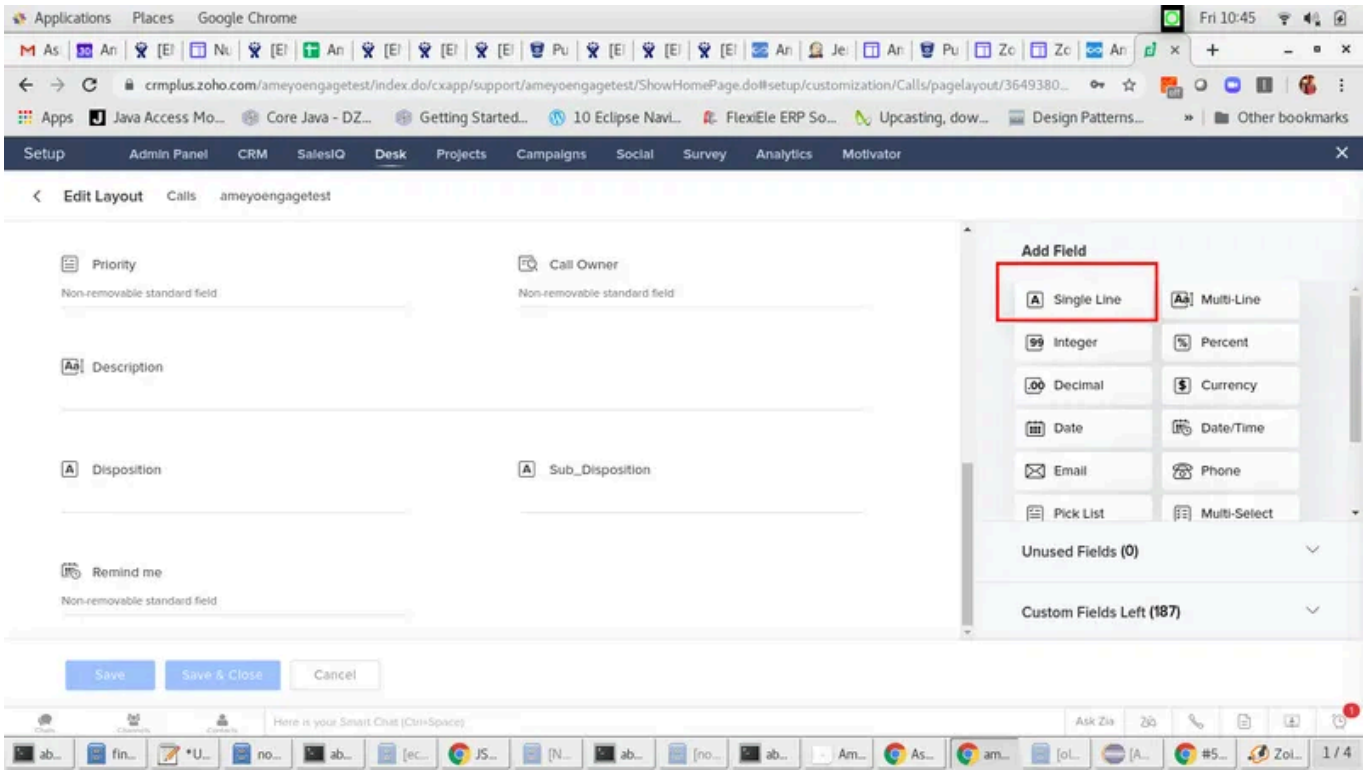


- Select the **Calls** module layout and click **Edit Layout**.



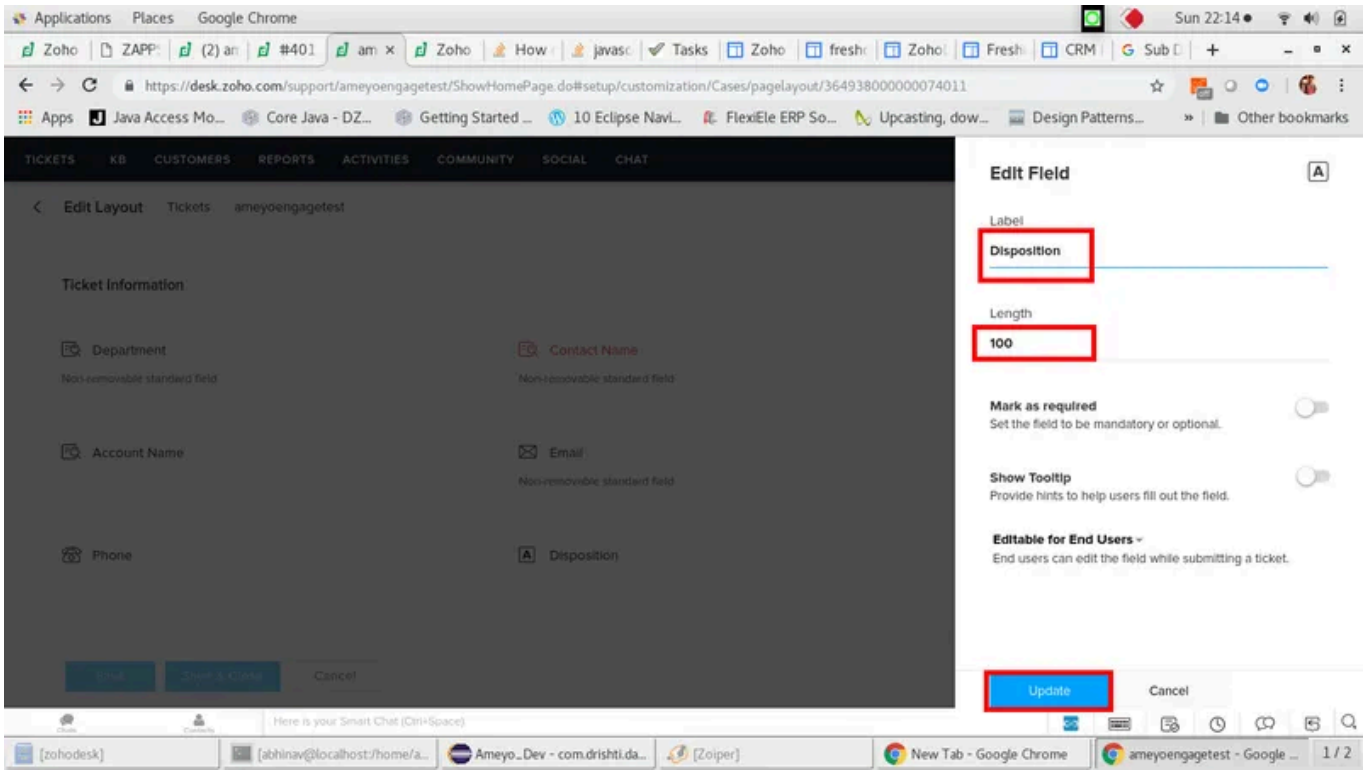
- Drag and drop the **Single Line** field on the left side. Enter the Details and than click on ADD/UPDATE button.

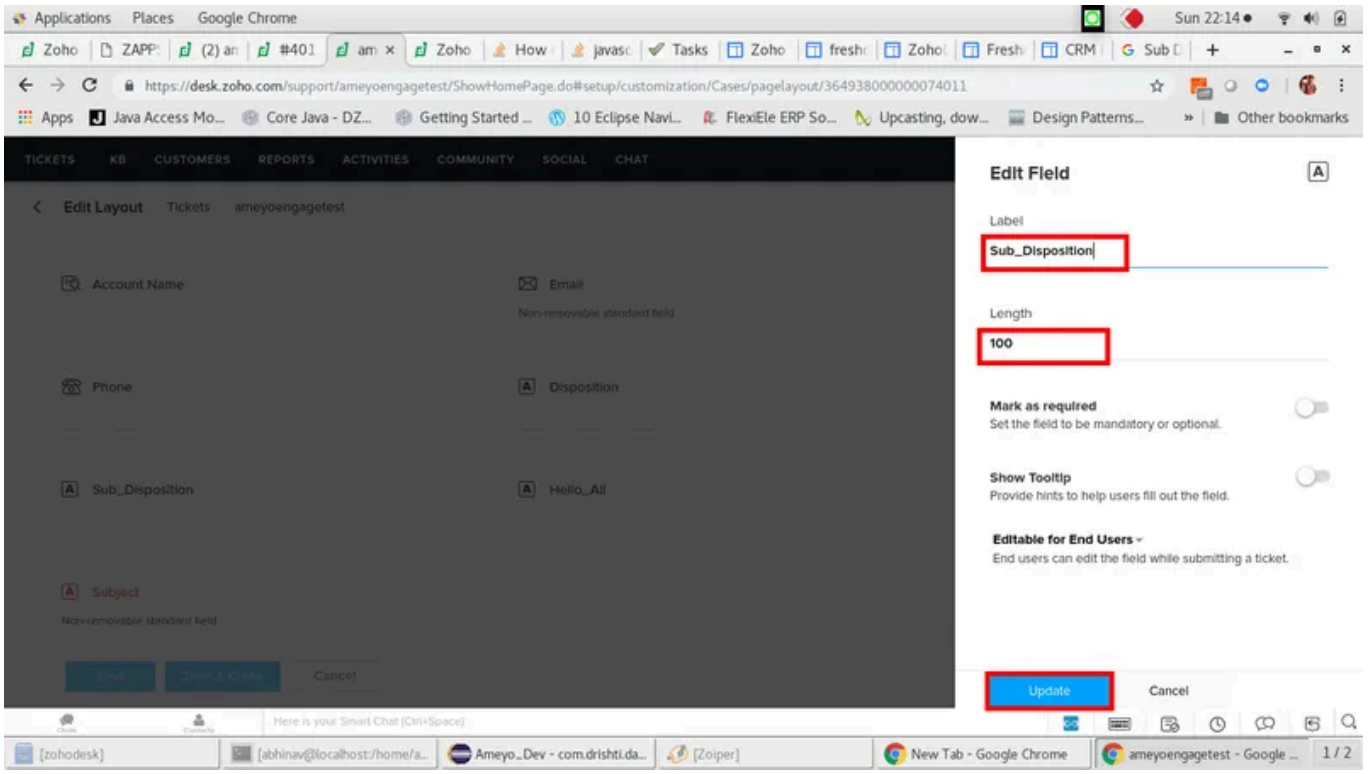




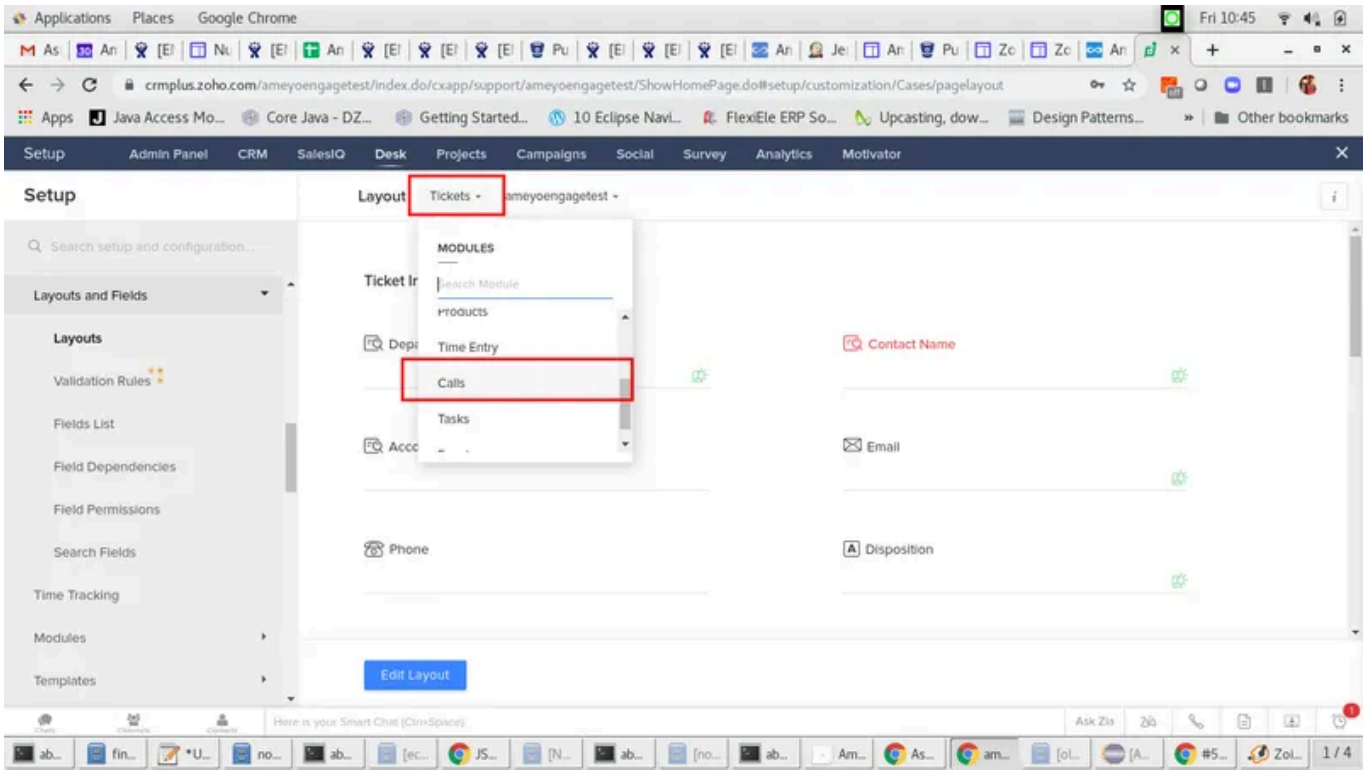
- Create the following two custom fields:
- **Field 1:** Label: **Disposition,** Length: 100
- **Field 2:** Label: **Sub_Disposition,** Length: 100
- Click **ADD/UPDATE** after configuring each field.
- Click **Save and Close** on the layout editor.

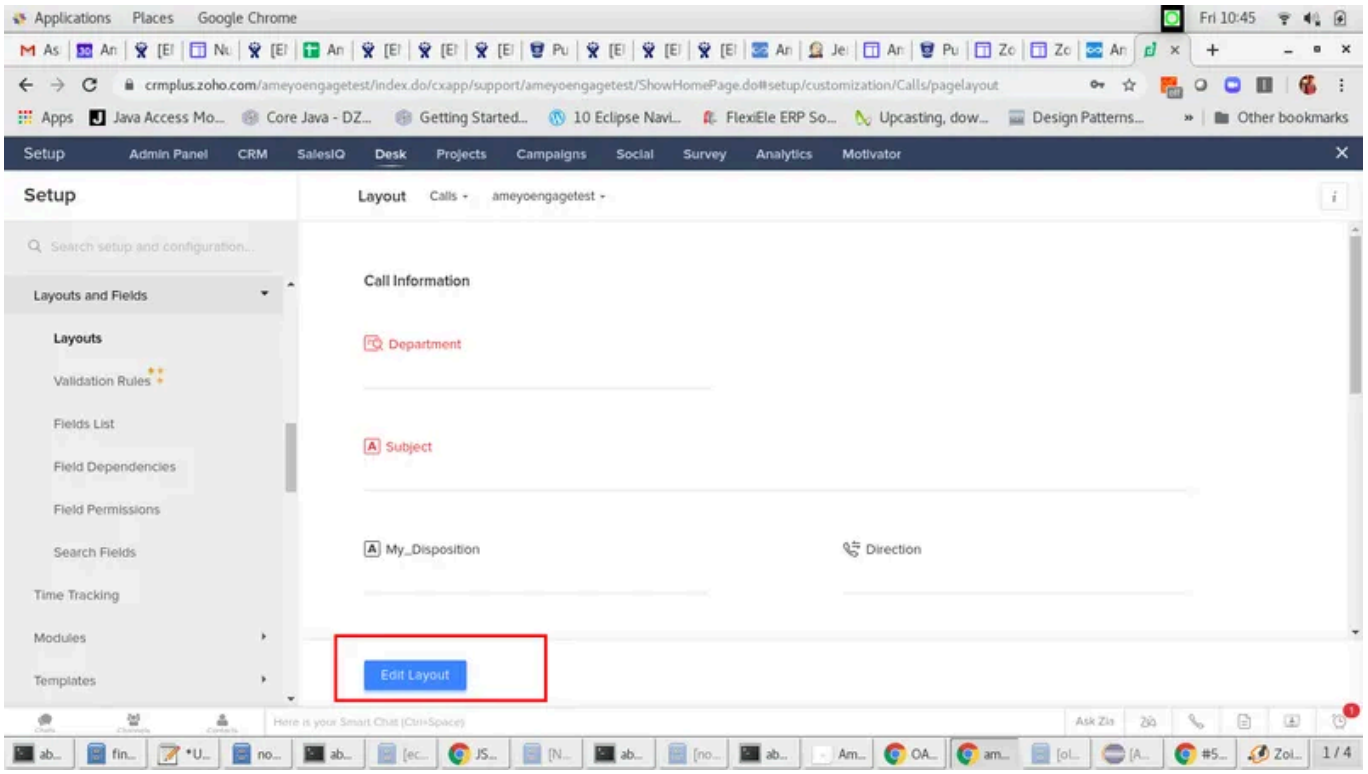
> Using these exact labels is crucial for data dumping to work correctly.

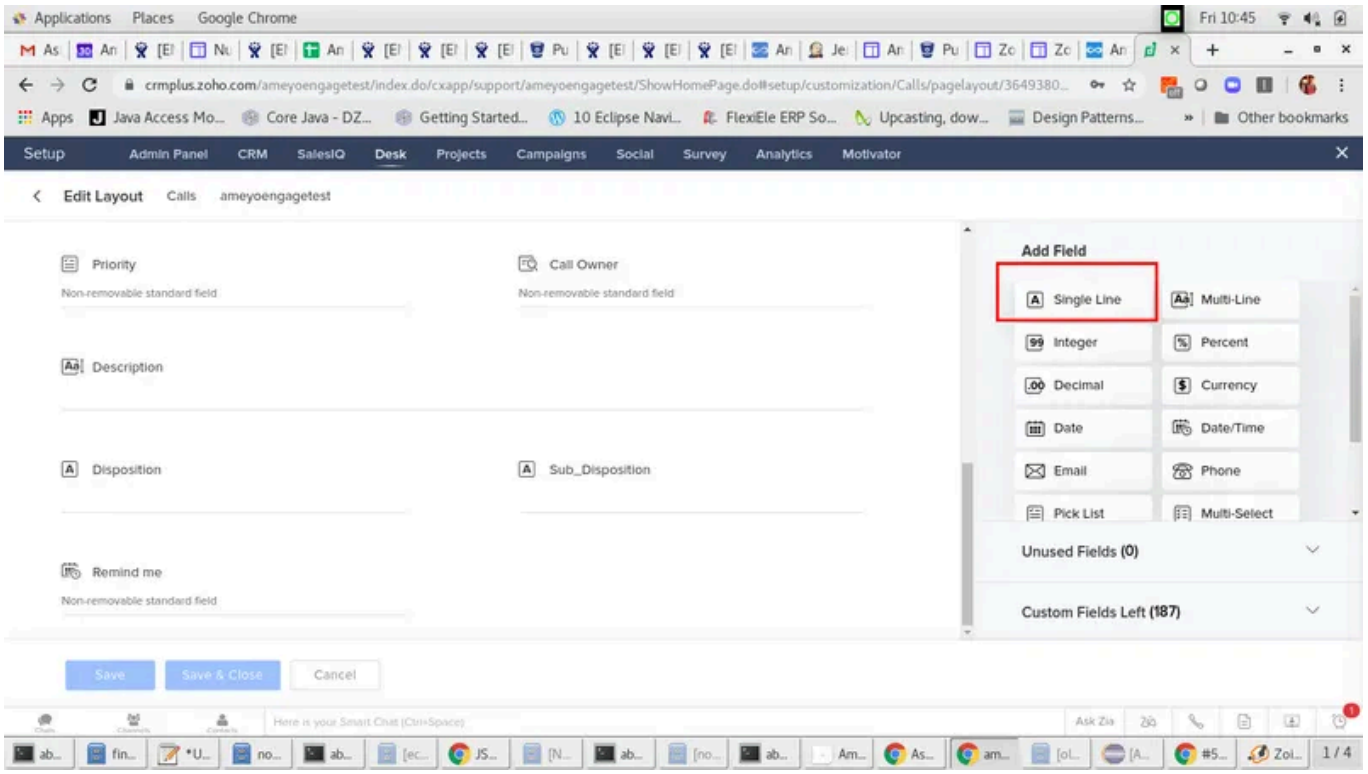


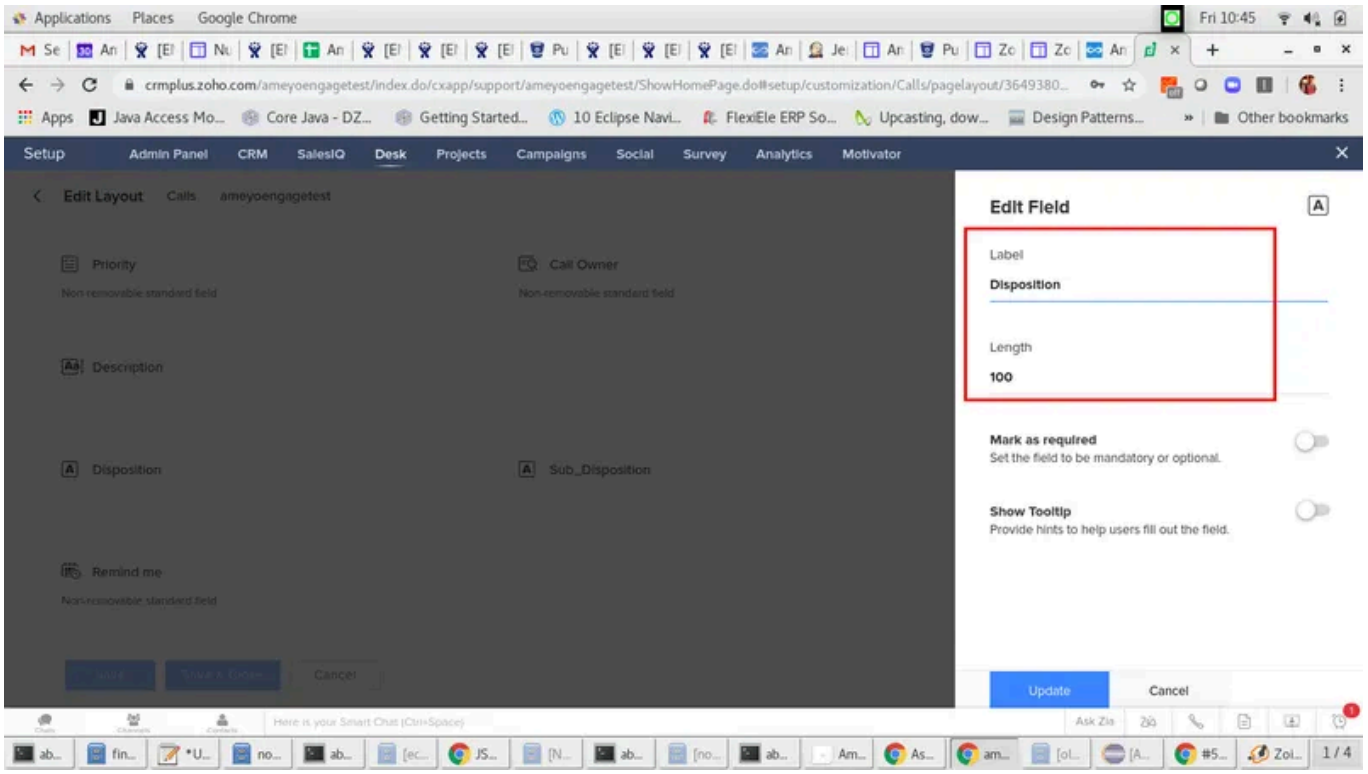


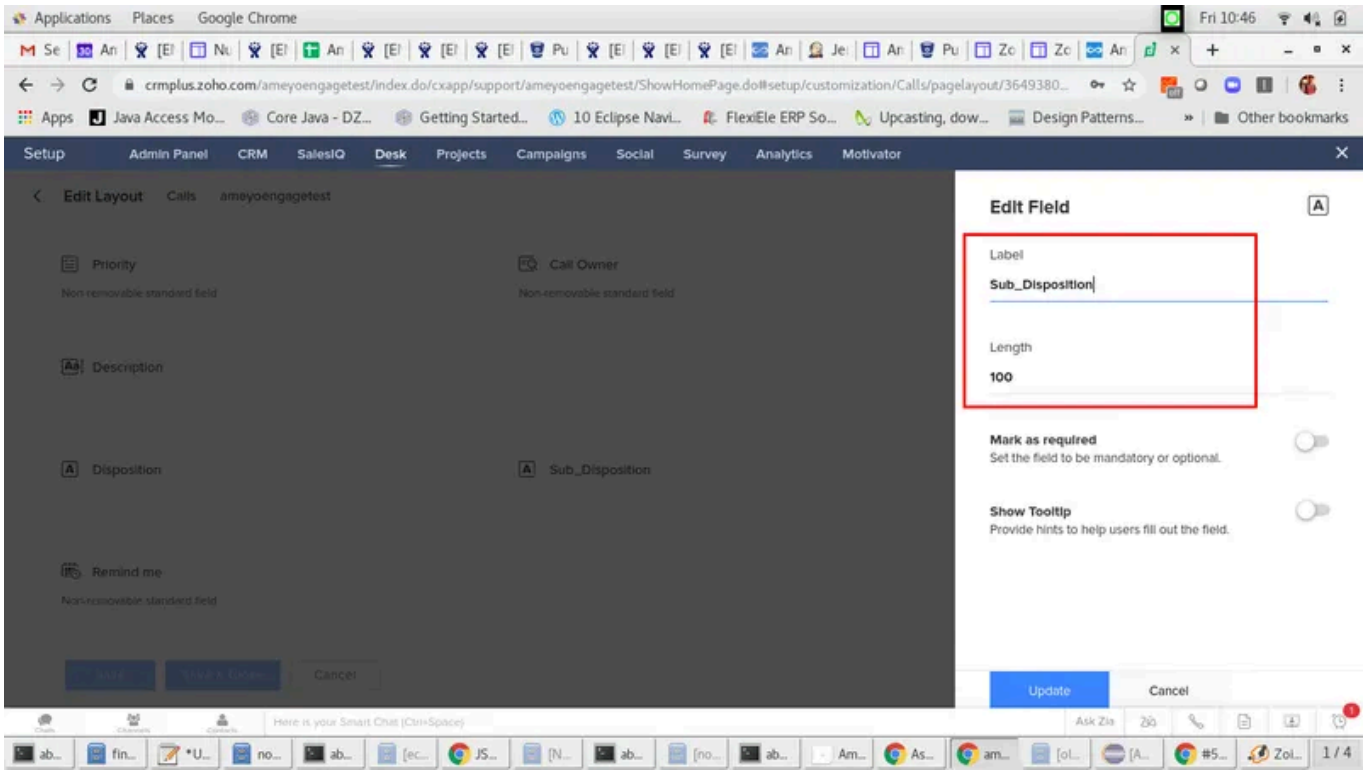
In Release 4.7 and above make these custom fields for Calls Module.


Applications Places Google Chrome
Fri 10:45
crmplus.zoho.com/ameyoengagetest/index.do/cxapp/support/ameyoengagetest/ShowHomePage.do#setup/customization/Cases/pagelayout
Setup
Admin Panel
CRM
SalesIQ
Desk
Projects
Campaigns
Social
Survey
Analytics
Motivator
Layout
Tickets
ameyoengagetest
MODULES
Search Module
Products
Time Entry
Calls
Tasks
Contact Name
Email
Phone
Disposition
Edit Layout
Layouts and Fields
Layouts
Validation Rules
Fields List
Field Dependencies
Field Permissions
Search Fields
Time Tracking
Modules
Templates


Applications Places Google Chrome
Fri 10:45
crmplus.zoho.com/ameyoengagetest/index.do/cxapp/support/ameyoengagetest/ShowHomePage.do#setup/customization/Calls/pagelayout
Setup
Admin Panel
CRM
SalesIQ
Desk
Projects
Campaigns
Social
Survey
Analytics
Motivator
Layout
Calls
ameyoengagetest
Call Information
Department
Subject
My_Disposition
Direction
Edit Layout
Layouts and Fields
Layouts
Validation Rules
Fields List
Field Dependencies
Field Permissions
Search Fields
Time Tracking
Modules
Templates

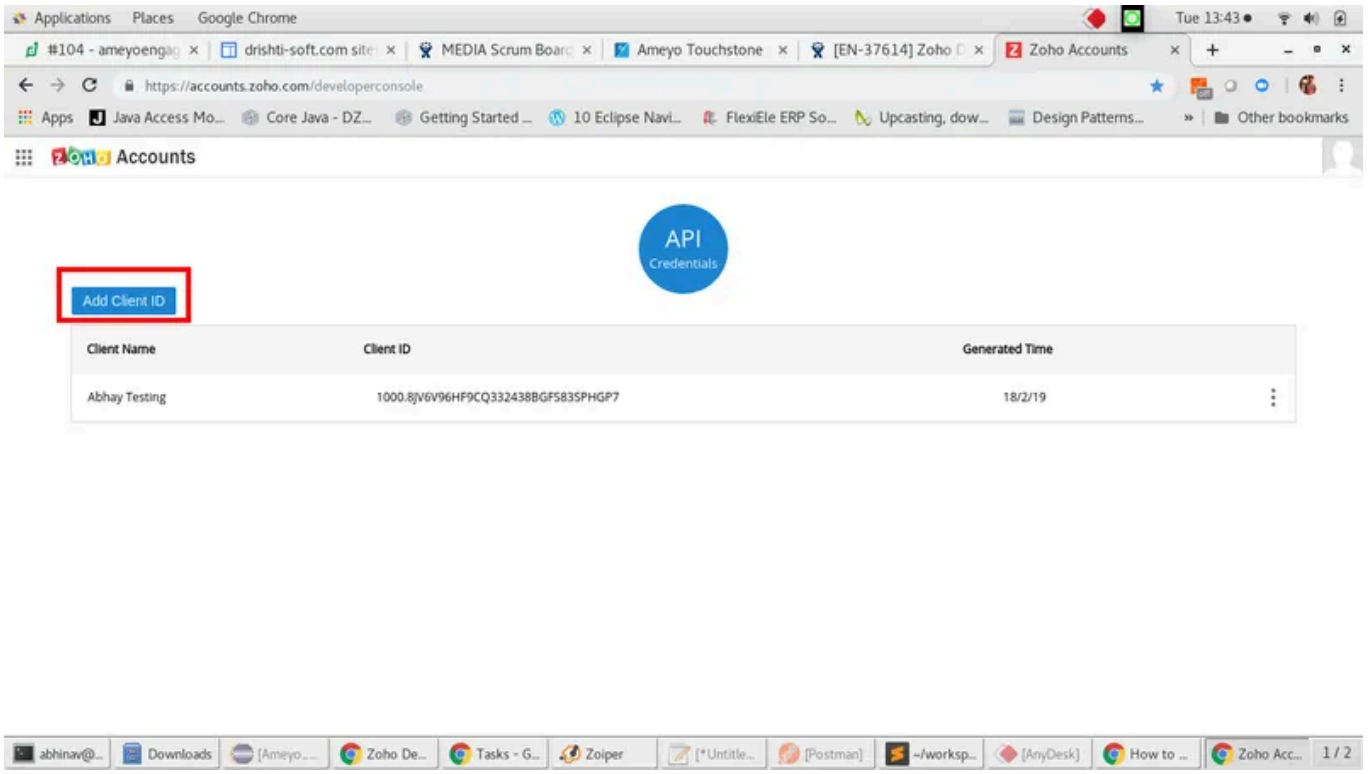

Applications
Places
Google Chrome
Fri 10:45
crmplus.zoho.com/ameyoengagetest/index.do/cxapp/support/ameyoengagetest/ShowHomePage.do#setup/customization/Calls/pagelayout/3649380...
Apps
Java Access Mo...
Core Java - DZ...
Getting Started...
10 Eclipse Navi...
FlexiEle ERP So...
Upcasting, dow...
Design Patterns...
Other bookmarks
Setup
Admin Panel
CRM
SalesIQ
Desk
Projects
Campaigns
Social
Survey
Analytics
Motivator
Edit Layout
Calls
ameyoengagetest
Priority
Non-removable standard field
Call Owner
Non-removable standard field
Description
Disposition
Sub_Disposition
Remind me
Non-removable standard field
Save
Save & Close
Cancel
Add Field
Single Line
Multi-Line
Integer
Percent
Decimal
Currency
Date
Date/Time
Email
Phone
Pick List
Multi-Select
Unused Fields (0)
Custom Fields Left (187)
1 / 4

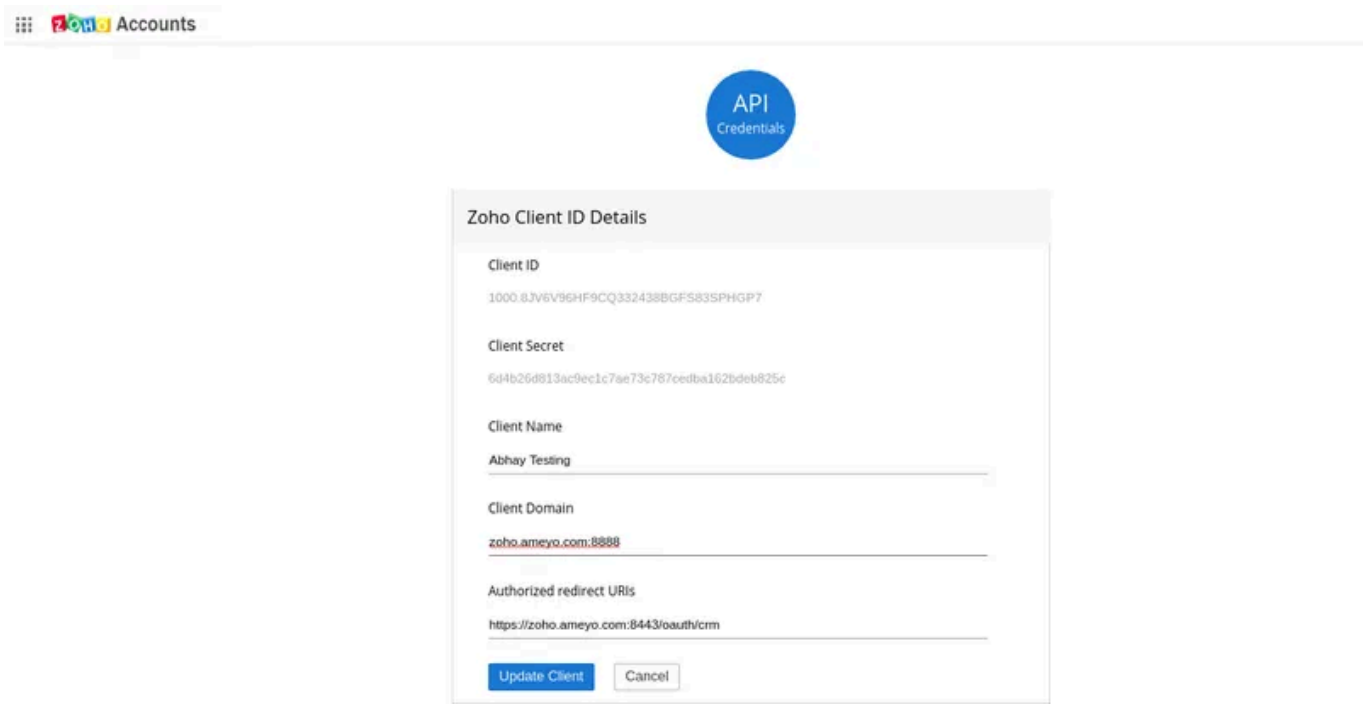

Applications
Places
Google Chrome
Fri 10:45
crmplus.zoho.com/ameyoengagetest/index.do/cxapp/support/ameyoengagetest/ShowHomePage.do#setup/customization/Calls/pagelayout/3649380...
Apps
Java Access Mo...
Core Java - DZ...
Getting Started...
10 Eclipse Navi...
FlexiEle ERP So...
Upcasting, dow...
Design Patterns...
Other bookmarks
Setup
Admin Panel
CRM
SalesIQ
Desk
Projects
Campaigns
Social
Survey
Analytics
Motivator
Edit Layout
Calls
ameyoengagetest
Priority
Call Owner
Description
Disposition
Sub_Disposition
Remind me
Edit Field
Label
Disposition
Length
100
Mark as required
Set the field to be mandatory or optional.
Show Tooltip
Provide hints to help users fill out the field.
Update
Cancel
1 / 4



Step 4. Configure Zoho Developer Console for OAuth:

- Go to the Zoho Developer Console (https://accounts.zoho.com/developerconsole).
- Click **Add Client**. Fill the details: Where in place of domain name put you ameyo server domain.





- Fill in the details:
  - **Client Name:** (e.g., Ameyo Integration)
  - **Homepage URL:** Your Ameyo server domain (e.g., https://yourameyodomain.com:8443)
  - **Authorized Redirect URIs:** Your Ameyo server's callback URLs:
    - https://<yourameyodomain.com>:8443/ameyowebaccess/_callback
    - https://<yourameyodomain.com>:8443/oauth/crm

- Click **Create**.
- Copy the generated **Client ID** and **Client Secret**. Keep these secure.

Note: if the Zoho DC is in India use the same in token url : i.e., use ".in" in token url instead of ".com" - https://accounts.zoho.in/oauth/v2/token

After executing the steps mentioned in this document, there will be few configurations done at the Ameyo DB as well, for which the details will be provided by the designated project manager/engineer

14.8.2. User Guide: Zoho Desk

1. Overview

This guide outlines the features and workflows for agents using the Ameyo telephony toolbar integrated directly within the Zoho Desk interface. The integration provides a seamless telephony panel that overlays the Zoho Desk parent interface, allowing agents to manage calls without leaving their CRM.

2. Getting Started

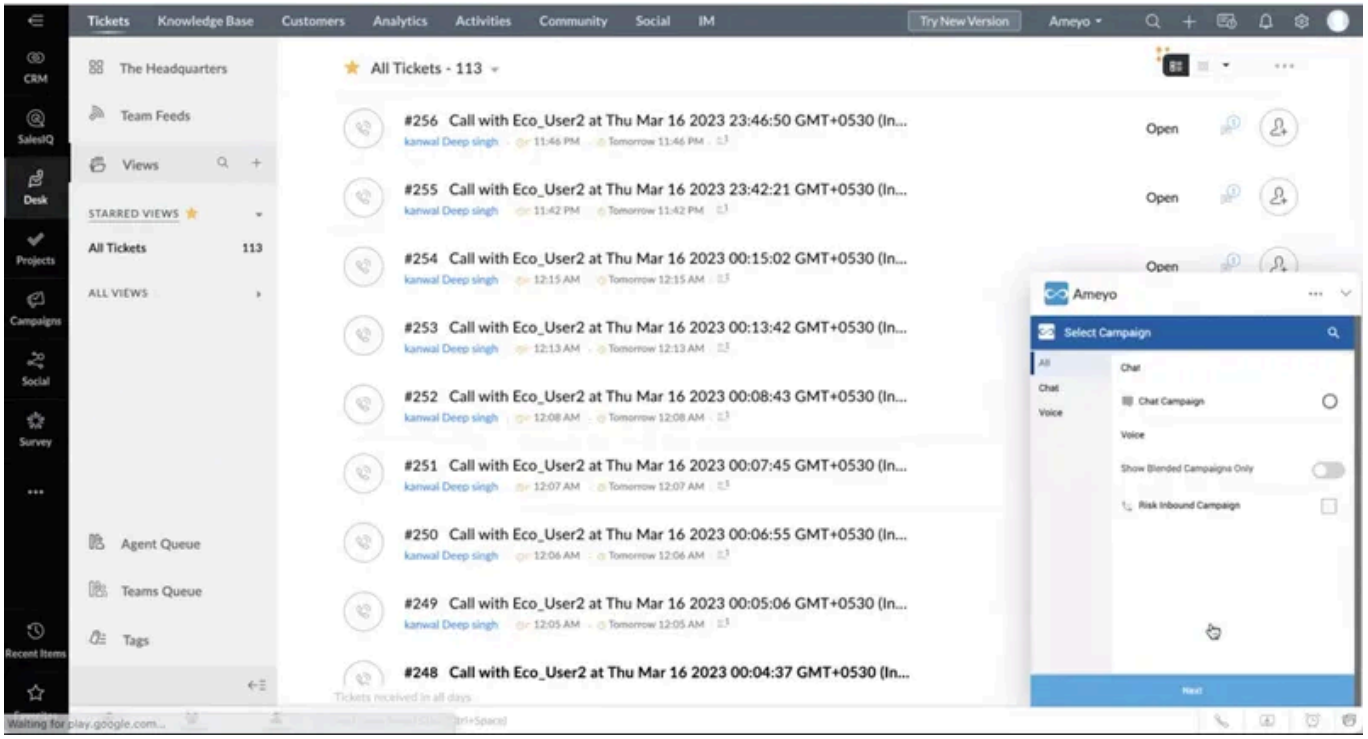
2.1 Login

To access the telephony features, agents must first log in to the panel.

- **Standard Login:** Enter your assigned **User ID** and **Password**.
- **Single Sign-On (SSO):** Click on the **Login via Zoho** option to authenticate using your existing Zoho credentials.

2.2 Campaign Selection

Once logged in, you will be prompted to select a **Campaign**. Choose the appropriate campaign you will be working under to proceed to the main interface.



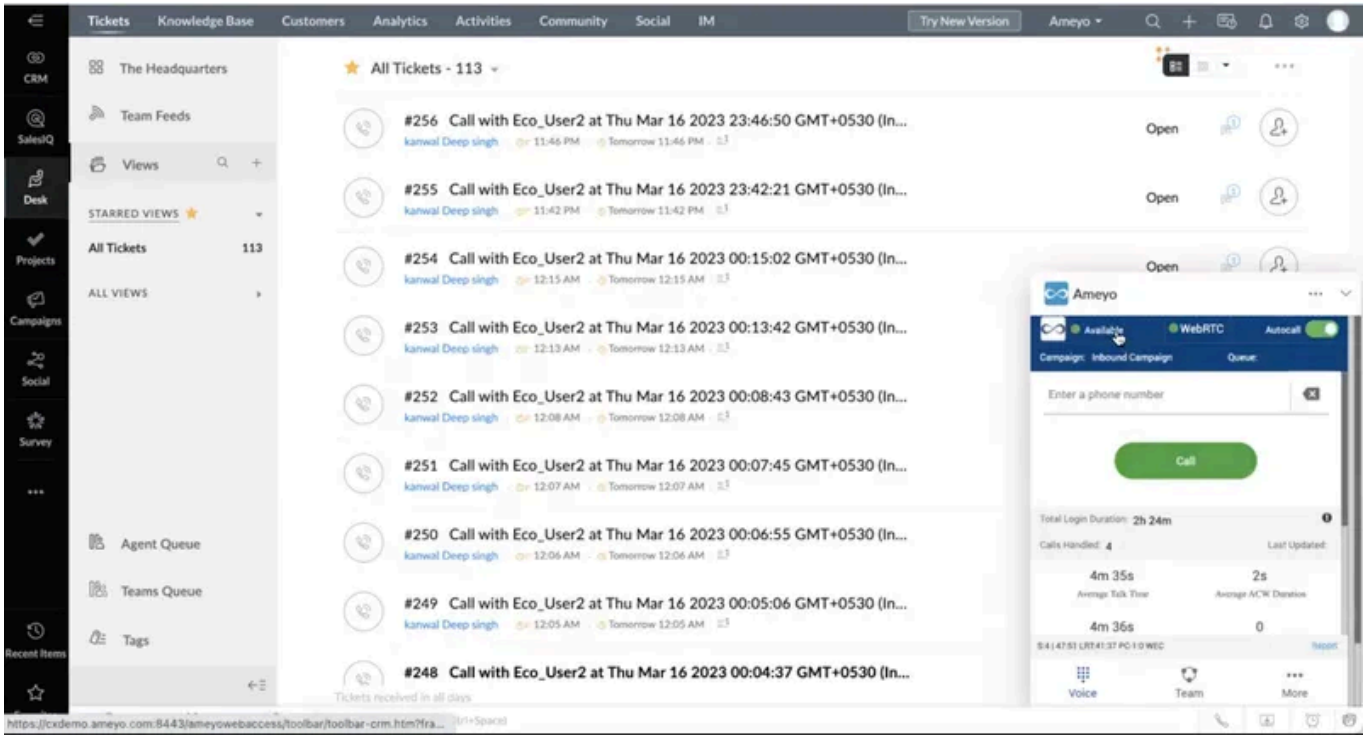
2.3 Prerequisites

- **WebRTC :** The telephony panel operates on WebRTC technology. This is a browser-based calling system, meaning agents do not require physical mobile or landline phones.
- Phone as Extension : The toolbar also provides option to choose your phone number as an agent extension

3. Managing Agent Status

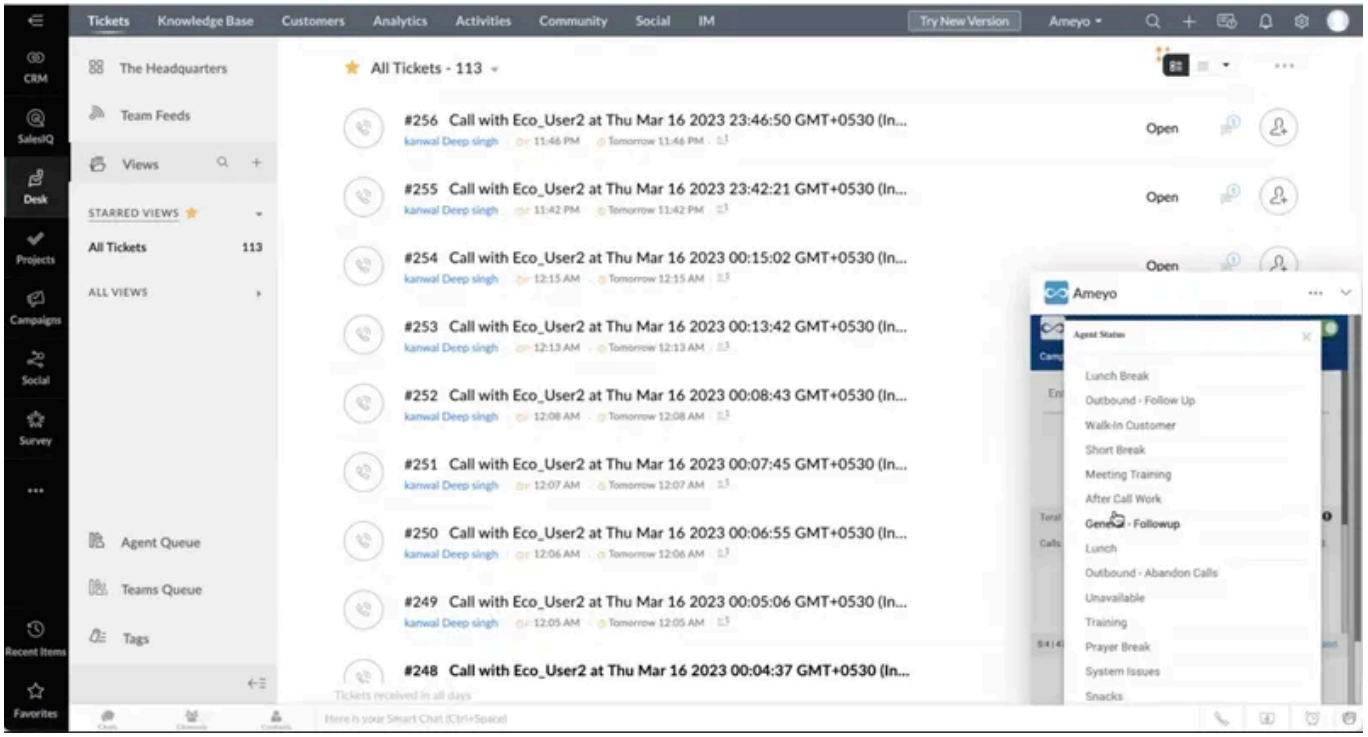
3.1 Availability

Upon a successful login, the agent's status should be marked as **"Available"** to receive calls.



3.2 Break Options

If you need to step away, you can select from a list of configurable **Break Options** within the panel to pause call distribution.



3.3 Auto Call Toggle

The panel features an **"Auto Call"** button. This acts as a toggle switch:

- **On:** You are ready to receive incoming customer calls or calls initiated by the automated dialer.
- **Off:** You can toggle this off to stop receiving calls if you need to focus on backend work or administrative tasks.

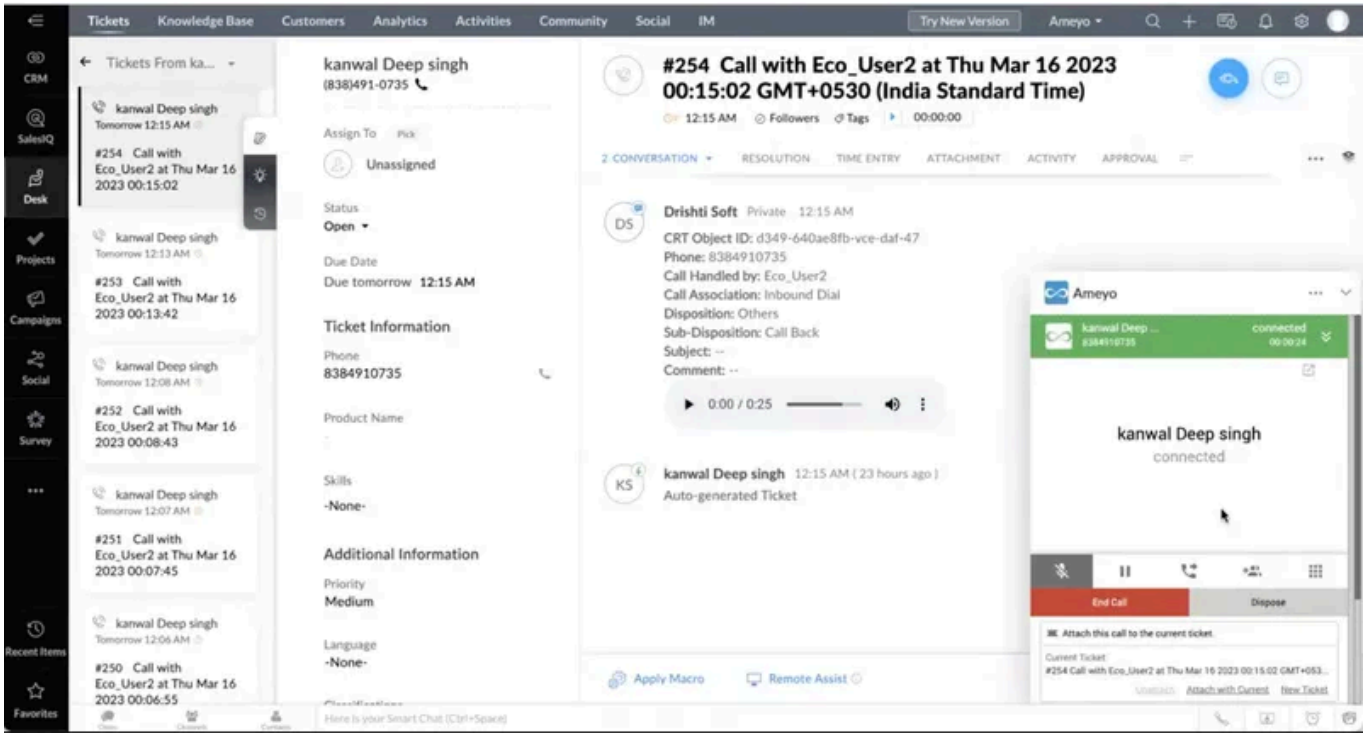
4. Call Management

4.1 Outbound Calling

- **Click-to-Call:** To initiate an outbound call, simply click on a customer's phone number displayed within the Zoho Desk interface.
- **CTI Pop-up:** Once the call is initiated, a CTI (Computer Telephony Integration) pop-up will appear, displaying relevant customer data to assist you during the conversation.

4.2 Inbound Calling

- **IVR Navigation:** Customers initiating inbound calls will navigate through a customizable IVR (Interactive Voice Response) journey before reaching an agent.
- **Call Arrival:** When the call lands on your extension, a CTI pop-up will appear showcasing customer-related data.
- **History:** You can view past interaction logs associated with that specific customer.



4.3 Call Controls

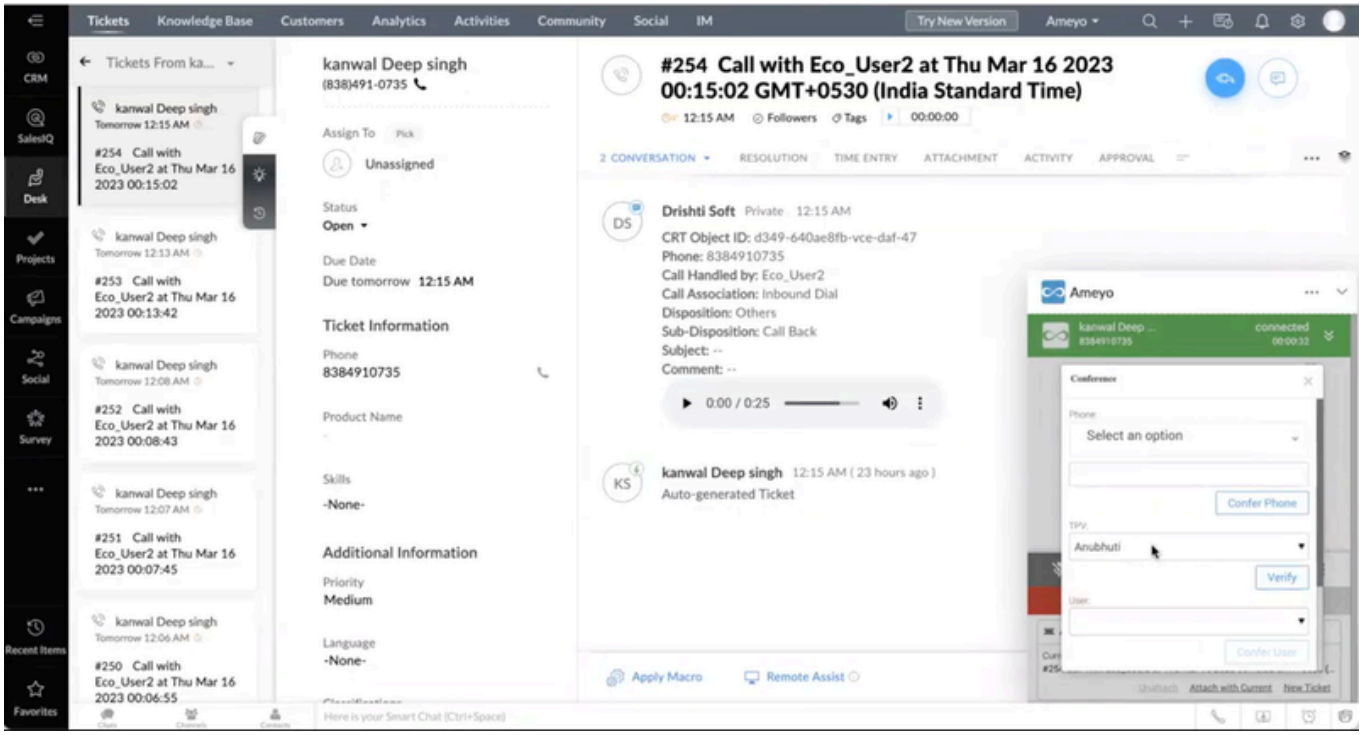
During an active call (inbound or outbound), the telephony panel provides a suite of standard controls:

- **Hold:** Pause the conversation.
- **Mute:** Mute your microphone.
- **Conference:** Add others to the call. You can invite a colleague or supervisor to join, or include a third party.
- **Transfer:** Transfer the active call to another colleague, a supervisor, or an external third-party number.

5. Call Completion & Follow-up

5.1 Call Disposition

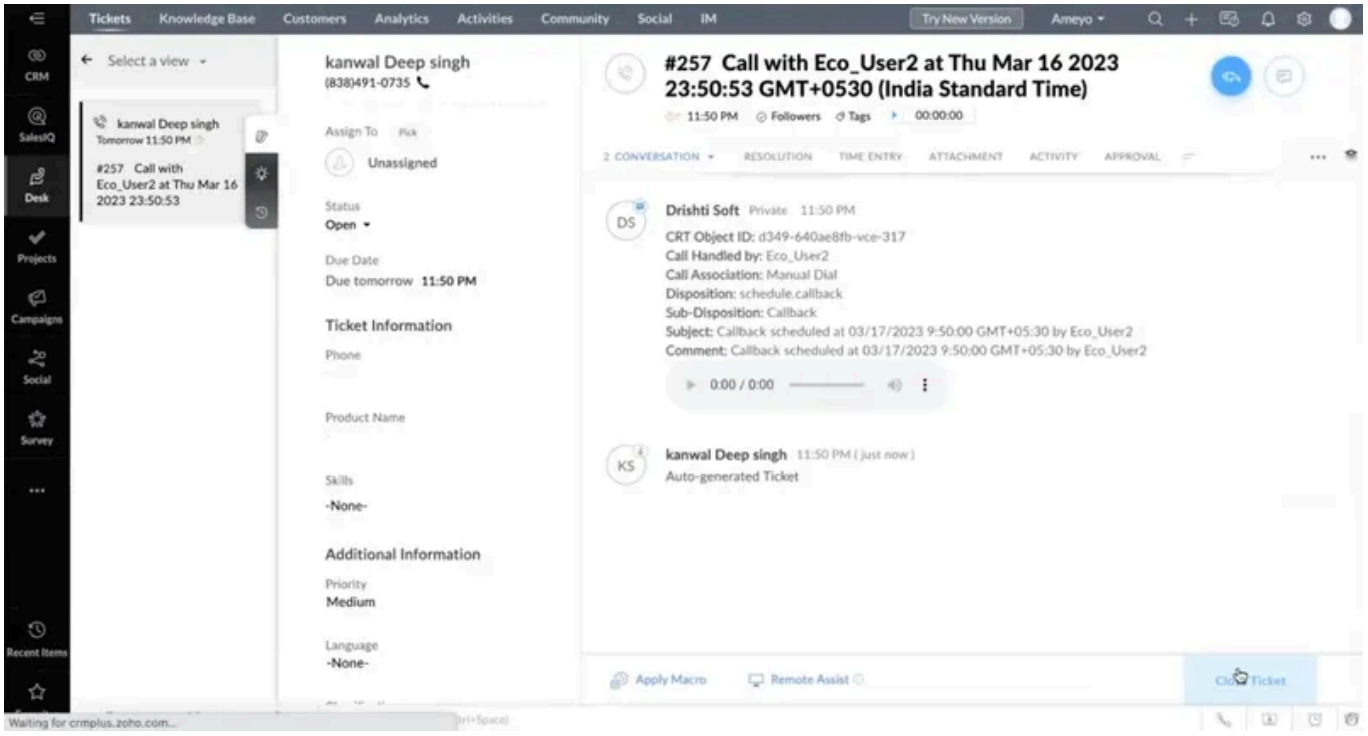
To end a call, you must select a **Disposition**. This indicates the final outcome of the interaction (e.g., "Sale Made," "Issue Resolved," "Callback Required"). All disposition codes are configurable based on business requirements.



5.2 Post-Call Data (Post Dumping)

Once a call is completed and disposed, call details are pushed back ("dumped") into Zoho Desk automatically. This record includes:

- Customer's phone number
- Name of the agent who handled the call
- Call type
- Selected disposition
- Complete voice recording of the interaction



If a follow-up is required, agents can schedule a callback based on the customer's availability.

- **Self-Callback:** If you select this option, the system will initiate the callback specifically from your interface at the scheduled date and time.
- **General Callback:** If you do not select "self-callback," the system will initiate the call for *any* agent available in that campaign at the scheduled time.

Note: After saving the disposition (and callback if applicable), you become available to handle the next customer.

6. Collaboration & Analytics

6.1 Team Chat

The **"Team"** tab allows for internal chat communication. Agents can use this to message colleagues or supervisors for real-time support or suggestions without interrupting the workflow.

6.2 Agent Statistics

Agents have access to a personal dashboard viewing their performance metrics, including:

- Total login duration
- Number of calls handled
- Average talk time
- Average after-call activity duration
- Average handling time
- Average hold duration
- Callback statistics
- Break count and total break duration

14.9. Zendesk Toolbar Integration with Ameyo

Overview

This document details the procedure for integrating the Ameyo toolbar within the Zendesk Support interface. This integration allows agents to utilize Ameyo's telephony features directly from Zendesk, streamlining workflows by combining communication tools with customer support ticket management.

Key Benefits

- **Integrated Agent Experience:** Handle calls using the Ameyo toolbar embedded within the Zendesk environment, reducing the need to switch applications.
- **Click-to-Dial:** Initiate outbound calls directly from Zendesk user profiles or tickets by clicking phone numbers.
- **Contextual Information:** Automatically creates new tickets in Zendesk when initiating calls via Click-to-Dial from the user side-nav, providing context for the interaction.
- **Automated Logging:** Voice log dumping and note additions are automatically associated with the relevant Zendesk ticket, ensuring accurate record-keeping.

Functionality

The integration adds an Ameyo icon to the Zendesk top navigation bar. Clicking this icon opens the Ameyo toolbar in a popup window. Agents log in to the toolbar using their Ameyo credentials. The integration provides Click-to-Dial functionality from user profiles (listing direct line numbers) and potentially within tickets. When initiating a call from the user side-nav, a new ticket is automatically created. Call activities, voice logs, and notes are logged within the context of the active or newly created ticket.

Prerequisites

- An active Ameyo account.

- An active Zendesk Support account with administrator privileges.
- The Ameyo Zendesk App package (either available publicly on the Zendesk Marketplace or as a private app .zip file provided by Ameyo).
- Network connectivity allowing communication between Ameyo servers and Zendesk.

14.9.1. Zendesk App Installation Guide

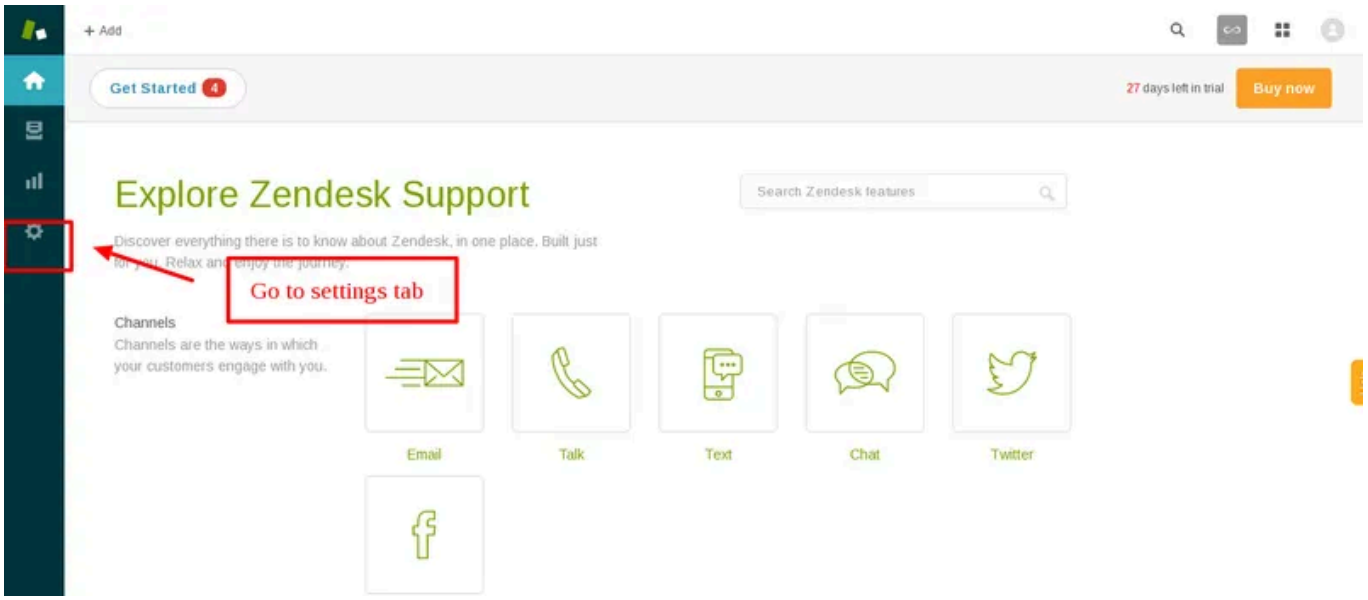
Overview

This document serves as a guide to configure the Zendesk App at Zendesk application's end. Please follow all the steps for the configuration given below.

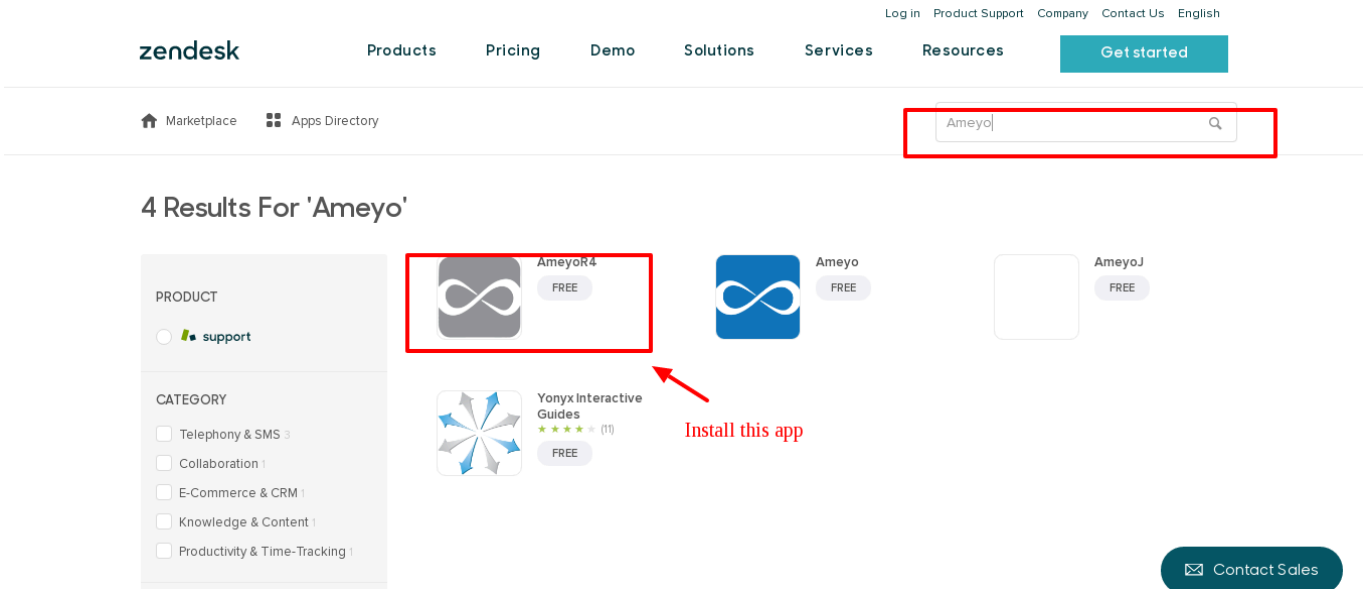
Usage Instructions:

Step 1: Zendesk App Installation

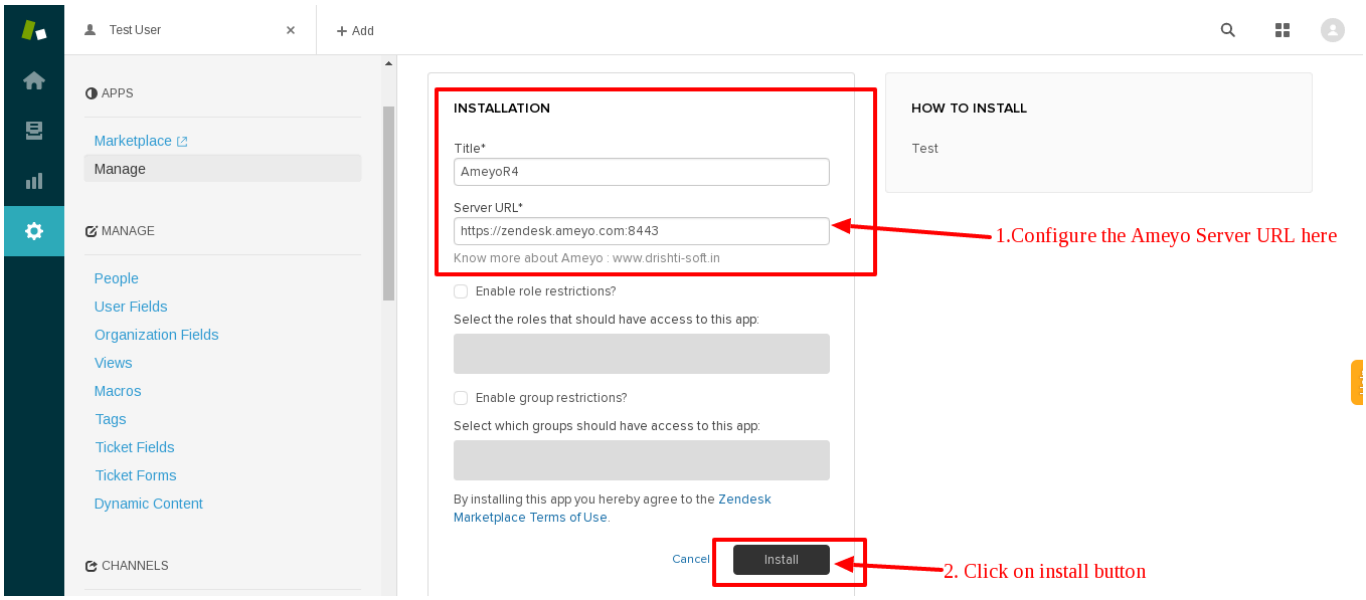
1. **Go to the settings tab.**



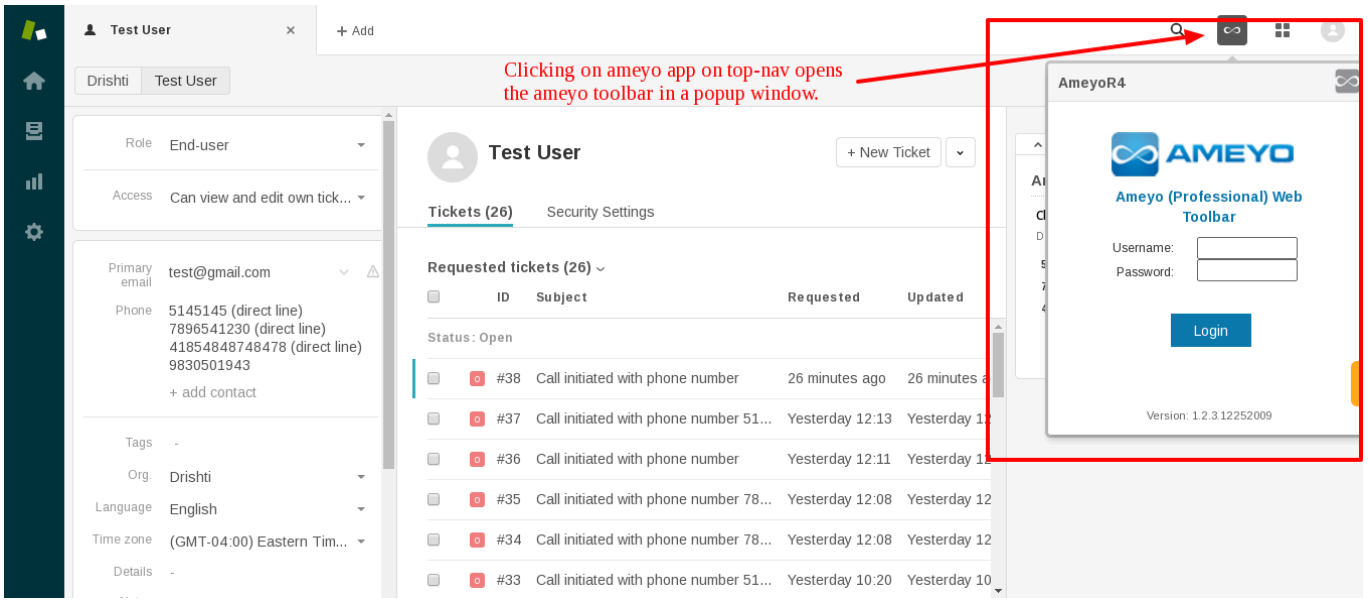
2. **Select the AmeyoR4 application**



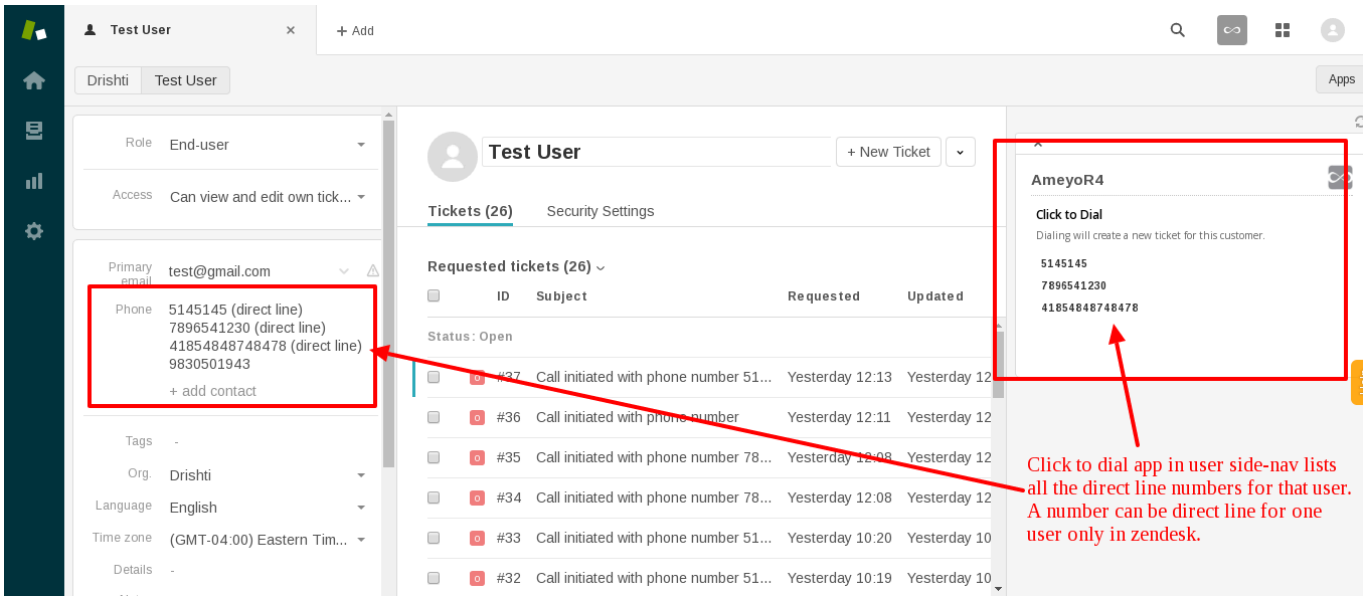
3. **Configure the Ameyo Server URL and select Install.**



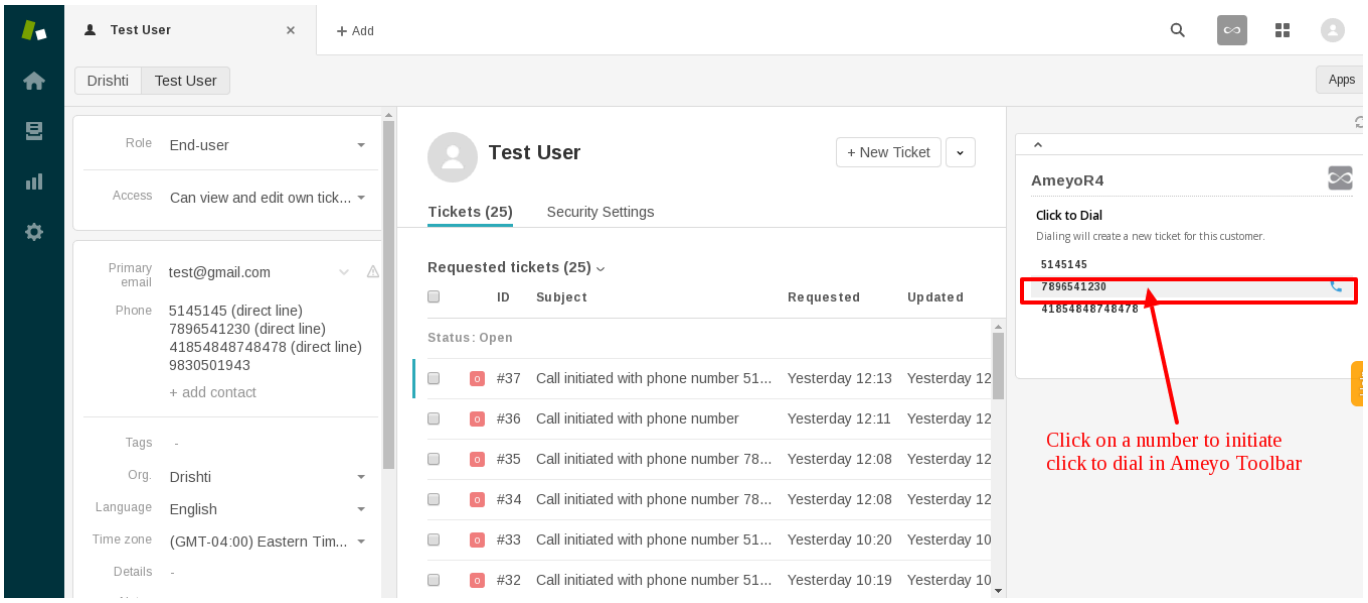
4. **Once installed, open the Ameyo toolbar by clicking on the Ameyo logo on the top right corner.**



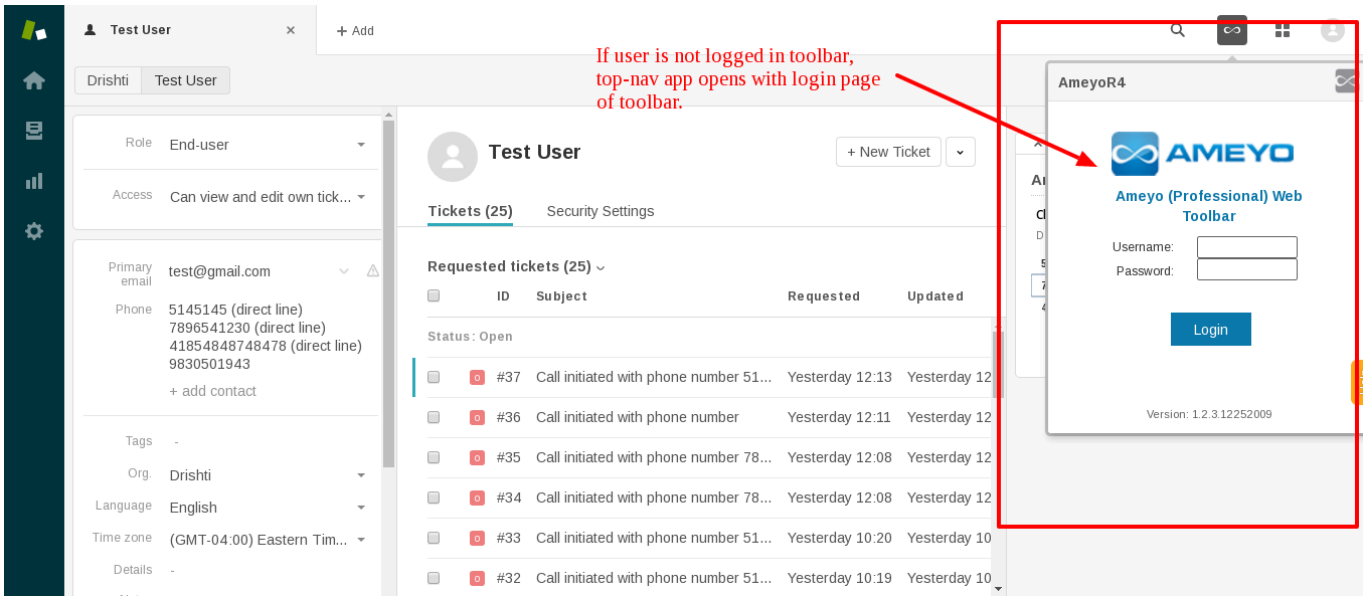
5. **Click to Dial lists all the direct line numbers for the user and requestor of the ticket. One number can be a direct line number for only one user on Zendesk.**



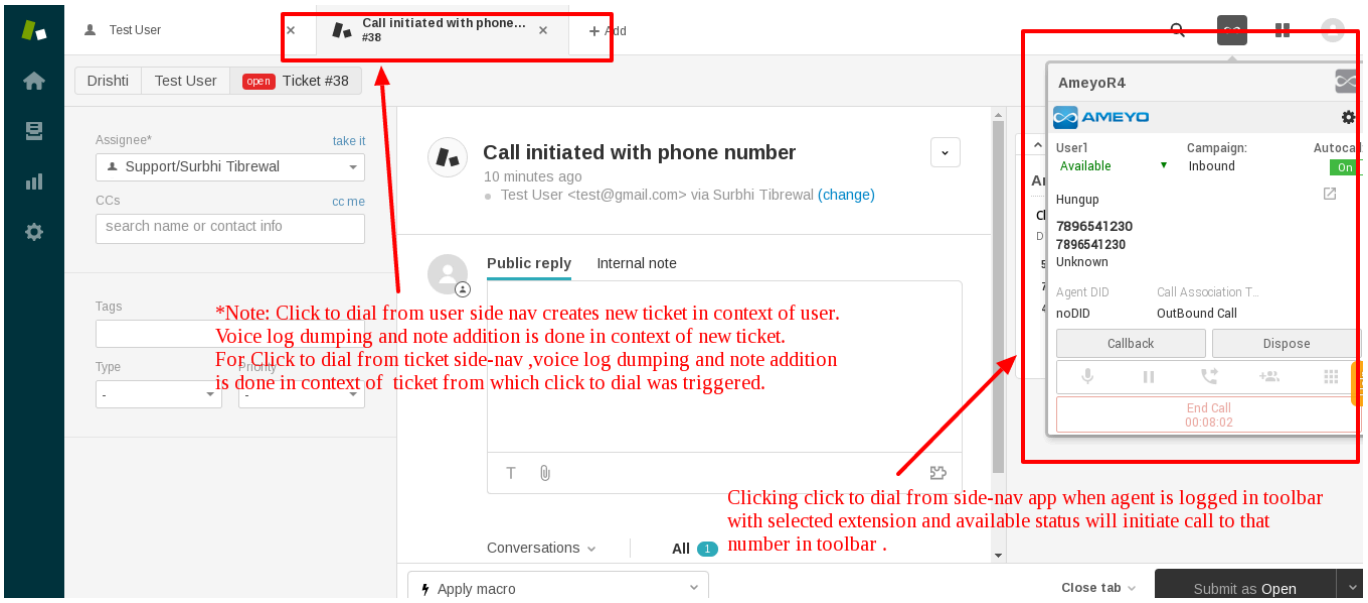
6. **Select a number to initiate Click to Dial on Ameyo toolbar.**



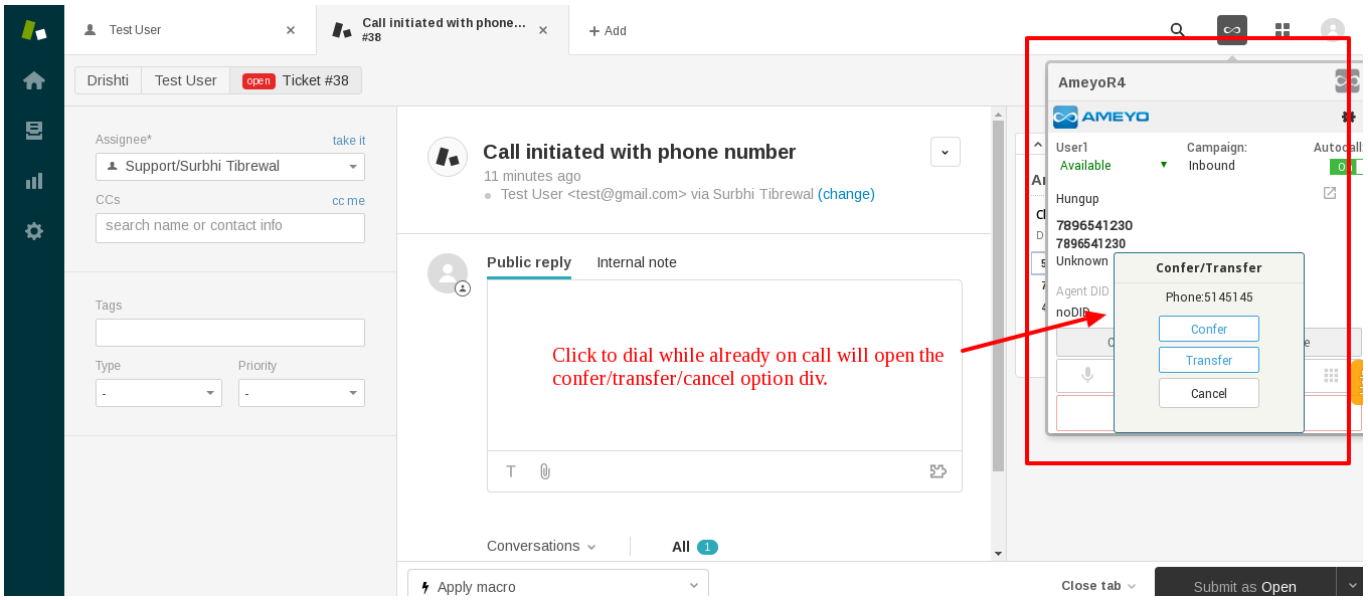
7. In case the user is not logged in, login page for the toolbar is displayed



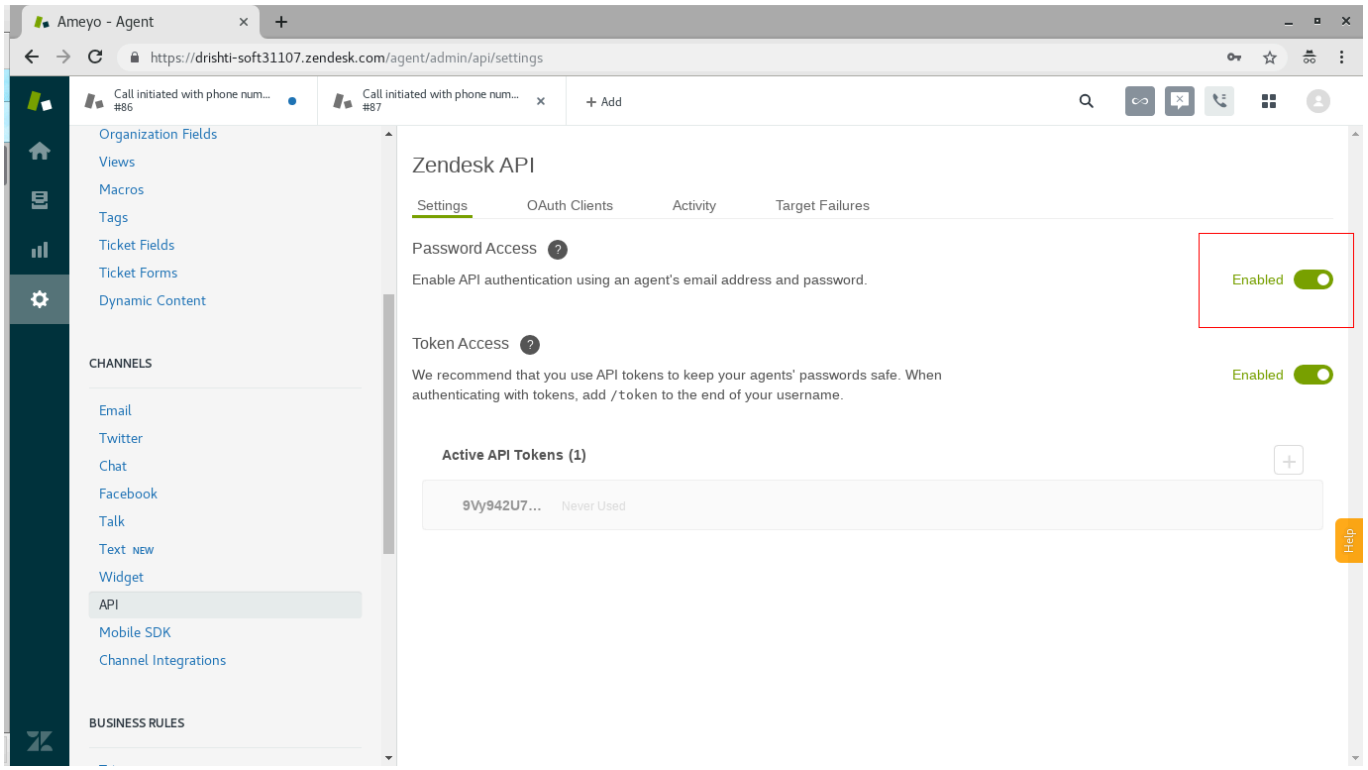
8. Once the user has logged in, the call is initiated and a new ticket is created.



9. **Once the call is connected, it opens a Confer/Transfer/Cancel pop-up.**

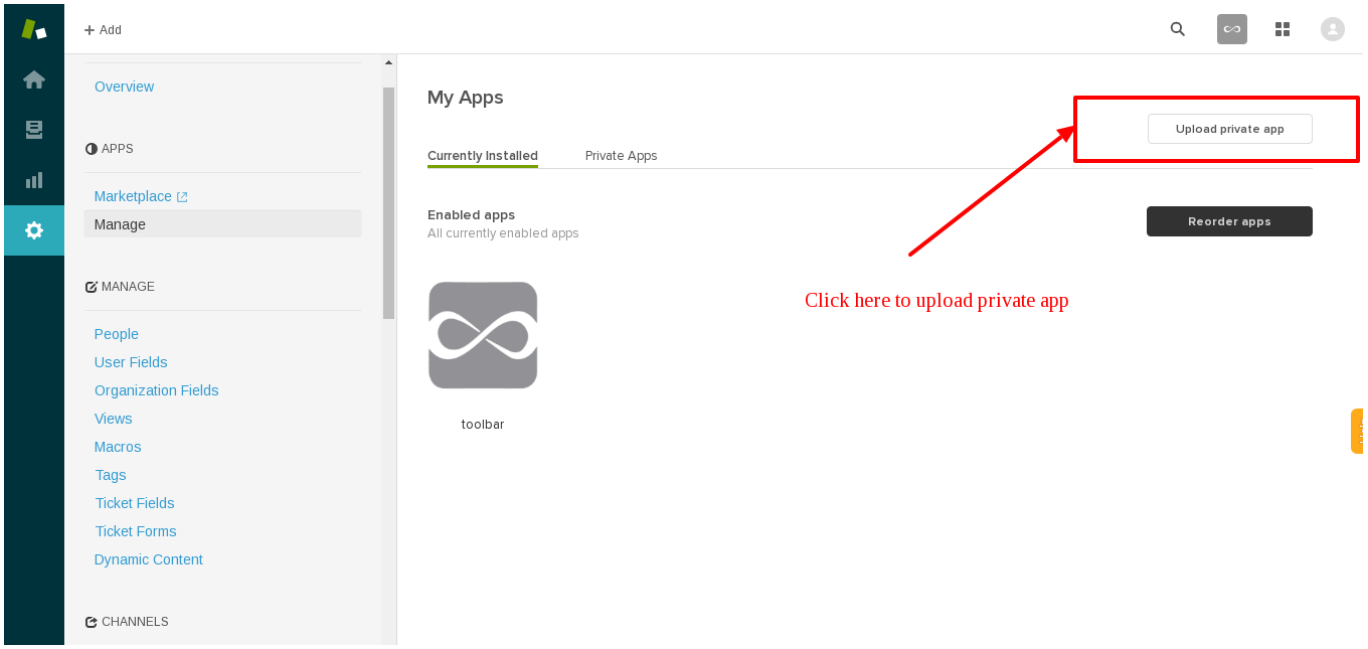


10. **Enable password for custom field dumping by going to the API tab on the settings menu.**

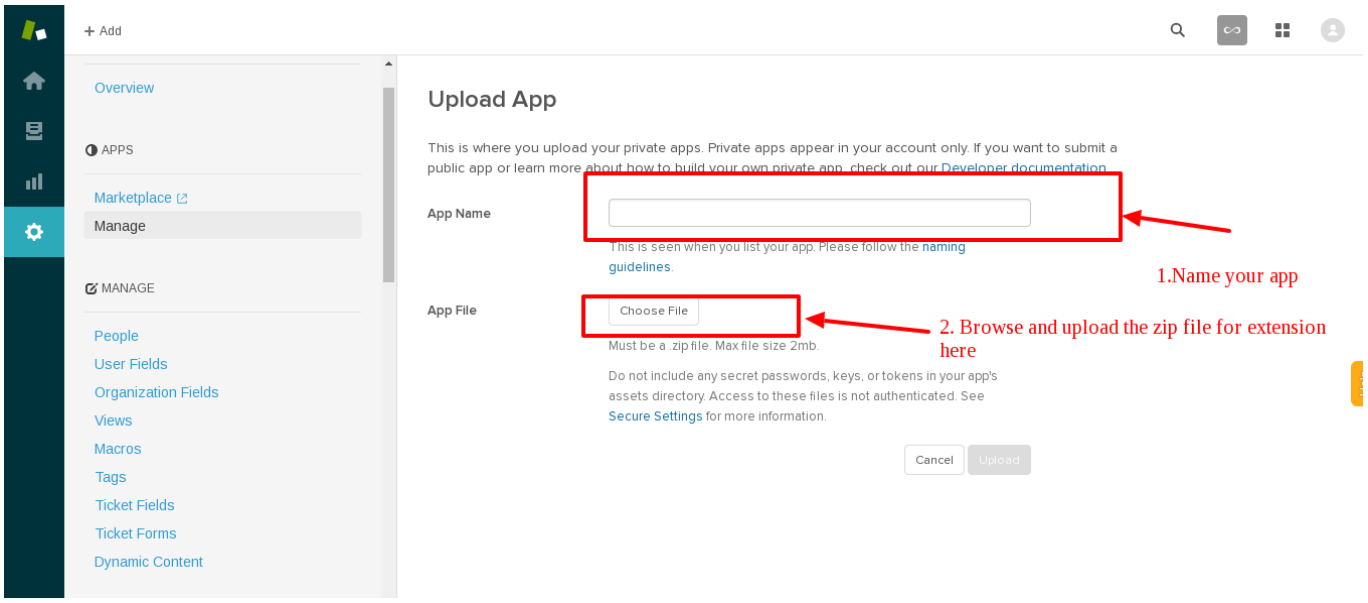


Step 2: Upload a private App on Zendesk

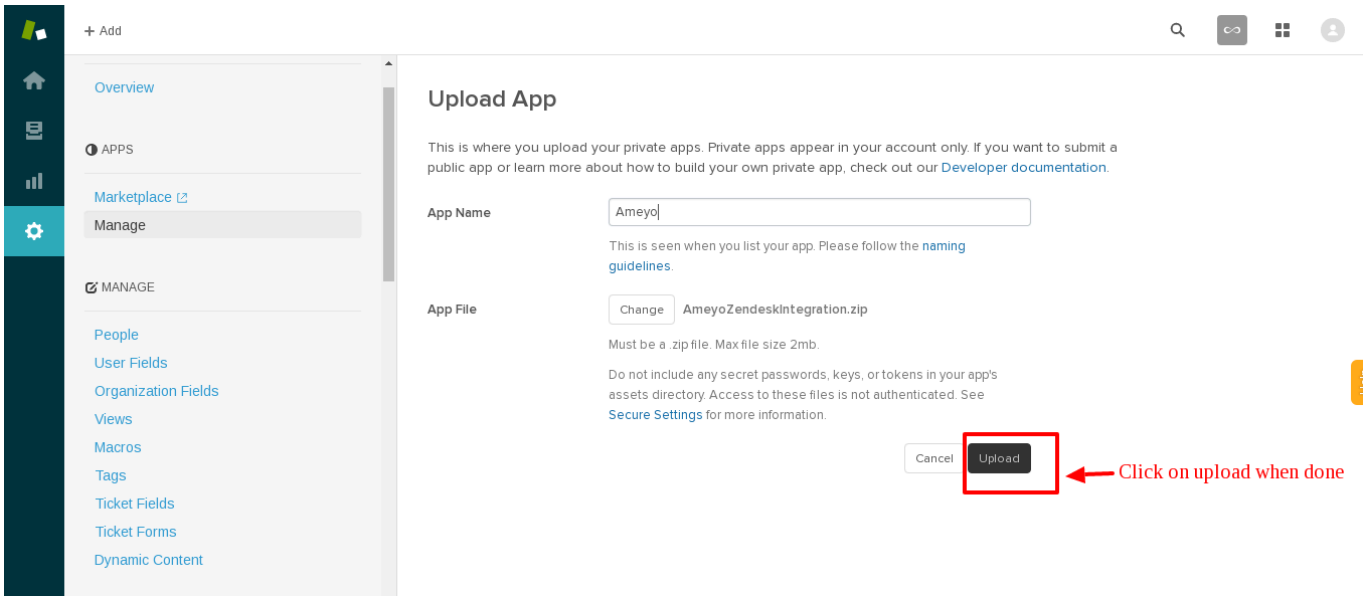
1. **Go to Settings, select Manage, and click on the "Upload private app" button.**

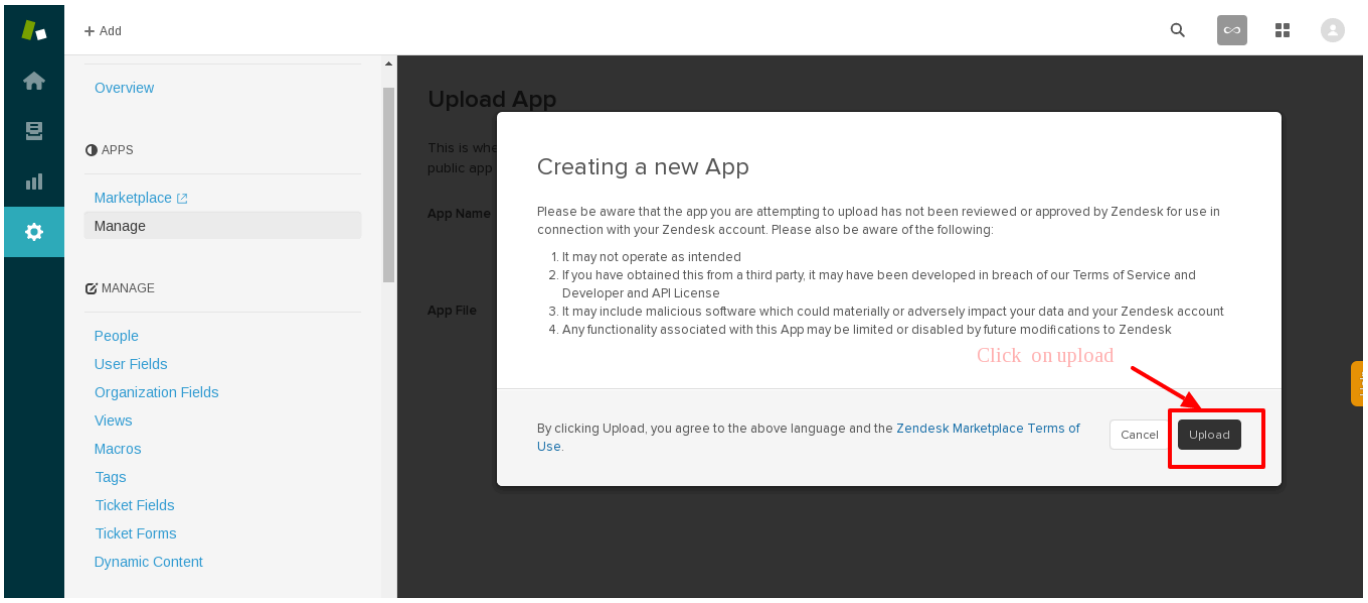


2. **Enter App Name and upload the App file.**



3. **Select Upload.**





After executing the steps mentioned in this document, there will be few configurations done at the Ameyo DB as well, for which the details will be provided by the designated project manager/engineer

15. Integration Documents

15.1. Exotel Chat SDK – Integration Reference

Overview

The **Exotel Chat SDK** (`exotel-chat-sdk.js`) is a JavaScript library that embeds the Exotel Live Chat widget into any web page. It exposes a global `window.exochat` object with methods for starting chat sessions, sending and receiving messages, handling file uploads, read receipts, and CSAT feedback.

This reference is intended for **third-party chatbot and web application developers** who need to integrate with the Exotel Chat widget – for example, to hand off bot sessions to live agents, exchange messages programmatically, or embed the widget in a custom CRM or portal.

How It Works

1. A web page or chatbot application includes `exotel-chat-sdk.js` via a `<script>` tag.
2. On `DOMContentLoaded` , the host page calls `exochat.initialize(config)` with the Exotel tenant credentials and campaign settings.
3. When a customer (or bot) is ready to chat, the host calls `exochat.startChat(params)` . This call:
    - POSTs to the Exotel Chat REST API to provision an XMPP user and MUC room for the session.

    - Dynamically loads **Converse.js** (XMPP client library) and connects over BOSH.
    - Joins the provisioned MUC room, where an agent (or queue) is waiting.
4. Incoming messages are received via the XMPP listener and surfaced through the `exochat.on("messageReceived", callback)` event.
5. At the end of the session, the agent closes the chat. The SDK receives a `chatEnded` message and (optionally) presents a CSAT feedback form.

Prerequisites

- The Exotel Chat service must be deployed and reachable at `chat_service_domain` (default port 4440).
- The CMS service must be reachable at `cms_service_domain` (default port 4433) for feedback configuration.
- The BOSH endpoint (`converse.bosh_service_url`) must be accessible from the customer's browser.
- A valid `auth_token` (`RestrictedToken <token>`) must be provided for REST API calls.
- A live campaign with at least one configured nodeflow must exist (`campaignId` , `nodeflowId`).

Embedding the SDK

```
<!-- Include the SDK -->
<script src="https://your-host/exotel-chat-sdk.js" defer></script>
<script>
  document.addEventListener("DOMContentLoaded", () => {
    window.exochat.initialize({
      chat_service_domain: "https://omni.example.com:4440",
      cms_service_domain:  "https://omni.example.com:4433",
      converse: {
        bosh_service_url:  "https://omni.example.com:4442/http-bind/"
      },
      auth_token:                "RestrictedToken <your_token>",
      contactCenterId:           1,
      campaignId:                10,
      nodeflowId:                3,
      processId:                 2,
      locale:                    "en",
      show_controlbox_by_default: true,
    });
  });
</script>
```

`exochat.initialize(config)`

Initialises the SDK, merges the provided values over defaults, and injects the chat icon into the DOM. Must be called once before any other method.

Signature: `exochat.initialize(config: ExochatConfig): void`

Configuration parameters

Parameter	Type	Required	Default	Description
`chat_service_domain`	string	Yes	–	Base URL of the Exotel chat service (port 4440). E.g. `https://omni.example.com:4440`
`cms_service_domain`	string	Yes	–	Base URL of the CMS service (port 4433). Used for feedback config lookup.
`converse.bosh_service_url`	string	Yes	–	BOSH endpoint for XMPP. E.g. `https://omni.example.com:4442/http-bind/`
`auth_token`	string	Yes	–	Authorization header value. Format: `"RestrictedToken <token>"`
`contactCenterId`	number	Yes	–	Numeric ID of the contact center.
`campaignId`	number	Yes	`1`	Campaign to route the chat into.
`nodeflowId`	number	Yes	`5`	Nodeflow (IVA) ID for routing logic.
`processId`	number	Yes	`4`	Process ID. Used for feedback config lookup.
`locale`	string	No	`"en"`	UI locale for the chat widget. E.g. `"en"`, `"hi"`.
`accountId`	string | null	No	`null`	Optional account ID sent as a request header for multi-tenant setups.
`theme_color`	string	No	`"#192D3F"`	Primary brand color for the chat widget UI.
`show_controlbox_by_default`	boolean	No	`true`	Whether to show the chat icon immediately on load.
`view_mode`	string	No	`""`	Display mode for the widget layout.

Methods

All methods are available on `window.exochat` after `initialize()` is called.

Session Management

`startChat(params)`

Creates an XMPP user and MUC room via the Exotel REST API, then loads Converse.js and joins the room. This is the primary method for bot-to-agent handoff.

Signature: `exochat.startChat(params: StartChatParams): Promise<Room>`

Input parameters

Field	Type	Required	Description
`fullName`	string	Yes	Customer display name shown to the agent.
`email`	string	Yes	Customer email. Stored as a user property on the session.
`phone`	string	Yes	Customer phone number. Stored as a user property on the session.
`user_id`	string | null	No	Bot user ID (for bot-to-agent transfers). Setting this marks the session as bot-transferred.
`session_id`	string | null	No	Bot session ID (for bot-to-agent transfers). Passed as `botSessionId`.
`...additionalInfo`	Record<string, any>	No	Any additional key-value pairs forwarded as `additionalInfo` to the REST API (e.g. custom CRM fields, intent, language).

Internal REST call

Endpoint: `POST {chat_service_domain}/plugins/restapi/v1/xtrm/users/connection`

Request headers:

```
{
  "Content-Type":    "application/json",
  "Authorization":   "<config.auth_token>",
  "contactCenterId": "<config.contactCenterId>",
  "accountId":       "<config.accountId>"
}
```

Request body:

```
{
  "requestId": "uuid-v4",
  "userEntity": {
    "name": "<fullName>",
    "properties": [
      { "key": "email",      "value": "<email>" },
      { "key": "phone",      "value": "<phone>" },
      { "key": "nodeflowId", "value": "<config.nodeflowId>" },
      { "key": "locale",     "value": "<config.locale>" }
    ]
  },
  "serviceName":     "conference",
  "campaignId":      "<config.campaignId>",
  "sendInvitations": true,
  "botTransferred":  false,
  "additionalInfo":  { },
  "botSessionInfo": {
    "userId":       "<user_id | null>",
    "botSessionId": "<session_id | null>"
  }
}
```

Successful response (200 OK):

```
{
  "userEntity": {
    "username": "xmpp_user@domain",
    "password": "xmpp_password",
    "name":     "Customer Display Name"
  },
  "mucRoomEntity": {
    "roomName": "room_abc123",
    "members":  ["user@domain", "agent@domain"],
    "owners":   ["agent@domain"]
  },
  "exportTranscriptAllowed": true
}
```

Promise resolution: On success, the Promise resolves with the Converse **Room** object returned by `joinRoom()`. On failure, it rejects with one of:

Error shape	Cause
`{ errorData, roomJid, customerJid }`	Failed to connect to XMPP/BOSH server after REST succeeded
`string` (HTTP statusText)	REST API returned a non-2xx status
`Error` object	Network / fetch exception

Bot-to-agent handoff example

```
exochat.startChat({
  fullName:   "Jane Smith",
  email:      "jane@example.com",
  phone:      "+919988776655",
  user_id:    "bot_user_id_123",
  session_id: "bot_session_abc",
  intent:     "billing_issue",
  language:   "en",
}).then((room) => {
  console.log("Handoff complete:", room);
}).catch((err) => {
  console.error("Handoff failed:", err.errorData || err);
});
```

`logout()`

Logs the XMPP user out of the Converse session.

Signature: `exochat.logout(): void`

`getUserStatus()`

Returns the current XMPP presence status of the user (e.g. `"online"`, `"away"`).

Signature: `exochat.getUserStatus(): string`

Room Management

`createRoom(roomJid, nick)`

Creates a new MUC room in Converse.

Signature: `exochat.createRoom(roomJid: string, nick: string): Promise<void>`

Parameter	Type	Description
`roomJid`	string	Full MUC JID of the room (e.g. `room_abc@conference.domain`).
`nick`	string	Nickname to use inside the room.

`joinRoom(roomJid, nick)`

Opens and joins an existing MUC room.

Signature: `exochat.joinRoom(roomJid: string, nick: string): Promise<Room>`

`leaveRoom(roomJid)`

Closes (leaves) a MUC room in Converse.

Signature: `exochat.leaveRoom(roomJid: string): void`

Messaging

`sendMessage(roomJid, body, type, files)`

Sends a message to the specified MUC room.

Signature: `exochat.sendMessage(roomJid: string, body: string, type: string, files: FileAttachment[] | null): void`

Parameter	Type	Description
`roomJid`	string	Full MUC JID of the destination room.
`body`	string	Message text (or file URL when `type` is `MEDIA_MSG`).
`type`	string	`"NORMAL_TEXT_MSG"` for plain text; `"MEDIA_MSG"` for file attachments.
`files`	FileAttachment[] | null	Array of file objects when `type` is `MEDIA_MSG`; `null` for text messages.

```
// Send a text message
exochat.sendMessage(roomJid, "Hello, how can I help?", "NORMAL_TEXT_MSG", null);

// Send a file attachment
exochat.sendMessage(roomJid, fileUrl, "MEDIA_MSG", [{ url: fileUrl, name: "report.pdf" }
```

`receiveMessage(message)`

Triggers the `"messageReceived"` event and returns the message object. Typically called internally by the XMPP listener; can be called manually to inject messages.

Signature: `exochat.receiveMessage(message: MessageObject): MessageObject`

`fetchArchivedMessages(roomJid)`

Fetches the message history for a room from the REST API and replays it into the widget's message list.

Signature: `exochat.fetchArchivedMessages(roomJid: string): Promise<void>`

Internal REST call: `GET {chat_service_domain}/plugins/restapi/v1/xtrm/chatrooms/{roomJid}/messages`

Typing Indicators

`sendTypingStatus(roomJid)`

Sends an XMPP "composing" chat state to the room (the local user is actively typing).

Signature: `exochat.sendTypingStatus(roomJid: string): void`

`sendPausedStatus(roomJid)`

Sends an XMPP "paused" chat state to the room (the local user has stopped typing).

Signature: `exochat.sendPausedStatus(roomJid: string): void`

Read Receipts

`sendDisplayedReceipt(roomJid, msgid)`

Sends an XEP-0333 "displayed" marker acknowledging that the customer has read a message. Also triggers the `"displayedReceipt"` event.

Signature: `exochat.sendDisplayedReceipt(roomJid: string, msgid: string): void`

`sendReceiveReceipt(roomJid, msgid)`

Sends an XEP-0184 "received" receipt confirming message delivery to the client. Also triggers the `"receiveReceipt"` event.

Signature: `exochat.sendReceiveReceipt(roomJid: string, msgid: string): void`

UI Control

`showConverseChat(e?)`

Shows the Converse chat panel within the widget.

Signature: `exochat.showConverseChat(e?: any): void`

`hideConverseChat(e?)`

Hides the Converse chat panel.

Signature: `exochat.hideConverseChat(e?: any): void`

`disconnectConverse(e?)`

Disconnects the active XMPP session (returns a Promise).

Signature: `exochat.disconnectConverse(e?: any): Promise<void>`

File Upload (XEP-0363 HTTP Upload)

Files are uploaded through the XMPP HTTP Upload extension. Use `uploadFileToConverse()` for the simplest integration.

`uploadFileToConverse(file)` *(recommended)*

Runs the full upload flow – discovers the upload service, requests a slot, uploads the file, and returns the public GET URL.

Signature: `exochat.uploadFileToConverse(file: File): Promise<string | null>`

Returns: The public URL of the uploaded file on success; `null` on failure.

```
const file = fileInput.files[0];
const publicUrl = await exochat.uploadFileToConverse(file);

if (publicUrl) {
  exochat.sendMessage(roomJid, publicUrl, "MEDIA_MSG", [{ url: publicUrl, name: file.nam
} else {
  console.error("File upload failed");
}
```

`requestSlotFromConverse(filename, size, contentType)`

Requests an HTTP upload slot from the XMPP server component (XEP-0363 IQ).

Signature: `exochat.requestSlotFromConverse(filename: string, size: number, contentType: string): Promise<{ putUrl: string, getUrl: string } | null>`

`uploadFile(file, putUrl, getUrl)`

Uploads a File via HTTP PUT to the slot URL.

Signature: `exochat.uploadFile(file: File, putUrl: string, getUrl: string): Promise<string | null>`

Returns: `getUrl` on HTTP 200; `null` on error.

`discoverFileUploadJID()`

Discovers the JID of the XMPP HTTP Upload service component.

Signature: `exochat.discoverFileUploadJID(): Promise<string | null>`

`requestUploadServiceInfo(jid)`

Sends a disco#info IQ to the upload service JID.

Signature: `exochat.requestUploadServiceInfo(jid: string): Promise<any>`

URL Utility Methods

Method	Signature	Returns	Description
`isImageURL`	`isImageURL(url: string): boolean`	boolean	`true` if the URL has an image extension (jpg, png, gif, webp, etc.).
`isAudioURL`	`isAudioURL(url: string): boolean`	boolean	`true` if the URL has an audio extension (mp3, ogg, wav, etc.).
`isVideoURL`	`isVideoURL(url: string): boolean`	boolean	`true` if the URL has a video extension (mp4, webm, etc.).
`isDocumentPdf`	`isDocumentPdf(url: string): boolean`	boolean	`true` if the URL ends with `.pdf`.
`getFileName`	`getFileName(url: string): string`	string	Extracts the filename from a URL path.

Feedback (CSAT)

`getFeedbackConfig()`

Fetches the feedback scheme configuration for the current campaign from the CMS.

Signature: `exochat.getFeedbackConfig(): Promise<FeedbackConfig | null>`

Internal REST call: `GET {cms_service_domain}/configuration/cc-list/{contactCenterId}/process-list/{processId}/campaigns/{campaignId}/chat-feedback-schemes-configurations/{campaignId}_{nodeflowId}_webchat`

Response shape:

```
{
  "isFeedbackEnabled": true,
  "openInNewTab":      false,
  "feedbackUrl":       "https://feedback.example.com/form"
}
```

`submitFeedbackResponse(interactionId, chatId, feedback)`

Posts the customer's CSAT rating to the chat service.

Signature: `exochat.submitFeedbackResponse(interactionId: string, chatId: string, feedback: any): Promise<Response>`

Endpoint: `POST {chat_service_domain}/plugins/restapi/v1/xtrm/chat-feedback`

Request headers:

```
{
  "Content-Type":    "application/json",
  "Authorization":   "<config.auth_token>",
  "contactCenterId": "<config.contactCenterId>",
  "accountId":       "<config.accountId>"
}
```

Request body:

```
{
  "campaign_id":    "<config.campaignId>",
  "interaction_id": "<interactionId>",
  "chat_id":        "<chatId>",
  "feedback":       { }
}
```

Event Subscription

`on(eventName, callback)`

Registers a callback for a named SDK event. Multiple callbacks per event are supported.

Signature: `exochat.on(eventName: string, callback: Function): void`

`triggerEvent(eventName, ...args)`

Internally used to emit events to all registered callbacks. Can also be called directly to fire events manually.

Signature: `exochat.triggerEvent(eventName: string, ...args: any[]): void`

Events

Subscribe with `exochat.on(eventName, callback)`.

`messageReceived`

Fired every time a message arrives in the MUC room from the XMPP server.

```
exochat.on("messageReceived", (message) => {
  if (message.chatEnded) {
    // Session was closed by the agent
    const { chatId, INTERACTION_ID } = message.interaction_data || {};
    handleChatEnd(chatId, INTERACTION_ID);
    return;
  }

  if (message.subType === "MEDIA_MSG" && message.files) {
    message.files.forEach(f => renderAttachment(f.url, f.name));
    return;
  }

  if (message.sender === "agent") {
    renderAgentMessage(message.body, message.nick, message.time);
    exochat.sendDisplayedReceipt(message.from_muc, message.msgid);
  }
});
```

Message Object schema

Field	Type	Description
`id`	string	Unique XMPP stanza element ID.
`msgid`	string	Application-level message ID used for receipts.
`body`	string	Plain text content of the message.
`from`	string	Full JID of the sender (e.g. `room@conference.domain/nick`).
`from_muc`	string	Bare MUC JID (e.g. `room@conference.domain`).
`from_real_jid`	string	Real un-masked JID of the sender.
`to`	string	Recipient JID.
`nick`	string	Sender's nickname inside the MUC room.
`occupant_id`	string	Stable occupant ID (XEP-0421).
`sender`	`"agent"` | `"me"`	`"agent"` for contact-centre-side messages; `"me"` for messages sent by this client.
`type`	`"groupchat"`	XMPP message type.
`chat_state`	`"active"` | `"composing"` | `"paused"` | `"inactive"`	XMPP chat state of the sender.
`time`	ISO 8601 string	Message timestamp.
`received`	timestamp	Time the message was received locally.
`message`	string	Alias for `body`.
`subType`	`"NORMAL_TEXT_MSG"` | `"MEDIA_MSG"` | `"FORM_MSG"` | null	Message sub-classification. `MEDIA_MSG` means file attachments are present.

Field	Type	Description
`files`	FileAttachment[] | null	Array of `{ url, name }` objects when `subType` is `MEDIA_MSG`; `null` otherwise.
`userRole`	`"AGENT"` | `"BOT"` | `"SUPERVISOR"` | null	Role of the sender on the contact-centre side.
`is_markable`	boolean	Whether the SDK should send a "displayed" marker back for this message.
`is_marker`	boolean	Whether this message is itself a read marker.
`marker_id`	string	When `is_marker` is `true`, the ID of the message being acknowledged.
`receipt_id`	string	ID for XEP-0184 receipt correlation.
`displayed`	boolean	Client-side flag tracking whether "displayed" has been sent. Default: `false`.
`interaction_data`	`{ chatId, INTERACTION_ID }` | null	Interaction metadata. Populated when `chatEnded` is `true`.
`chatEnded`	boolean	`true` when this message signals end-of-session (agent closed the chat).

`displayedReceipt`

Fired when the SDK sends a "displayed" read marker for a message. Useful for updating delivery indicators in a custom UI.

```
exochat.on("displayedReceipt", (roomJid, msgid) => {
  console.log("Displayed:", msgid, "in room:", roomJid);
});
```

Argument	Type	Description
`roomJid`	string	MUC JID where the receipt was sent.
`msgid`	string	ID of the message that was displayed.

`receiveReceipt`

Fired when the SDK sends an XEP-0184 "received" receipt confirming delivery to this client.

```
exochat.on("receiveReceipt", (roomJid, msgid) => {
  console.log("Received receipt for:", msgid);
});
```

Argument	Type	Description
`roomJid`	string	MUC JID.
`msgid`	string	ID of the acknowledged message.

CSAT Feedback Flow

After a chat ends, the SDK automatically fetches feedback config and may display a form. To drive this flow from your own UI:

```
exochat.on("messageReceived", async (msg) => {
  if (!msg.chatEnded) return;

  const { chatId, INTERACTION_ID } = msg.interaction_data || {};
  const config = await exochat.getFeedbackConfig();

  if (!config?.isFeedbackEnabled) return;

  if (config.openInNewTab) {
    window.open(config.feedbackUrl, "_blank");
  } else {
    // Show your own rating UI, then on submit:
    const rating = { score: 5, comment: "Great support!" };
    await exochat.submitFeedbackResponse(INTERACTION_ID, chatId, rating);
    console.log("Feedback submitted");
  }
});
```

Limitations

- The SDK dynamically loads **Converse.js 10.1.4** from the Converse CDN (`cdn.conversejs.org`). The customer's browser must be able to reach that CDN, or the CDN must be mirrored internally.
- XMPP connectivity requires the `bosh_service_url` to be accessible from the customer's browser over HTTPS.
- The chat icon UI (`#exotel-chat-icon`) is injected into the host page's `<body>`. Custom CSS or `z-index` styles on the host page may affect its display.
- `show_controlbox_by_default: false` hides the icon on load; you must call `showConverseChat()` to show the widget programmatically.
- File upload uses XEP-0363 HTTP Upload and requires the XMPP server to have the upload service component configured.
- The `view_mode` parameter is accepted but the specific modes are not publicly documented; consult Exotel support for available values.

16. Contact Center Reporting and Archival Solutions

16.1. Contact Center Reporting

16.1.1. Introduction

This document introduces to the definition of the reports included in Exotel's Ameyo Archiving and Reporting Tool (ART) and the definitions of the columns in these reports.

Majorly the reports can be divided into the following categories.

1. Voice Reports
2. Chat Reports
3. Interaction Reports

4. CRM Reports
5. Group Manager Reports

For the **Contact Center Reports Glossary**, please check out the links below

A | **B** | **C** | **D** | E | **Contact Center Reports Glossary** | G | **H** | **I** | J | K | **L** | **M** | N | **O** | **P** | **Q** | **R** | **S** | **T** | **U** | V | **W** | X | Y | Z

16.1.2. Voice

16.1.2.1. Voice Reports

The reporting suite offers a comprehensive set of analytical tools that help supervisors, admins, and business leaders measure contact center performance, agent productivity, and customer experience.

These reports enable **data-driven decision-making**, **SLA monitoring**, and **operational optimization** across inbound and outbound communication flows.

Key Report Categories

Report Name	Purpose	Applicable For
ACD Abandon Call Detail Report	Provides detailed call-level visibility of inbound or transferred calls abandoned in ACD queues, showing total customer wait times before abandonment. Helps assess queue performance and customer experience.	Inbound, Outbound (transferred calls)
ACD Abandon Call Summary Report	Offers summarized campaign-level insights on abandoned calls across queues. Identifies queues with high abandonment to improve service quality.	Inbound, Outbound (transferred calls)
ACD Call Details Report	Displays detailed information of all calls that reached the ACD queue, including queue transfers and answering queues.	Inbound, Outbound (transferred calls)
ACD Call Interval Summary Report	Summarizes connected and abandoned call performance during a user-defined interval. Useful for SLA and performance tracking.	Inbound, Outbound (transferred calls)
ACD Call Summary Report	Provides overall summary of ACD activity—connected vs. abandoned calls, SLA adherence, and service efficiency.	Inbound, Outbound (transferred calls)
Agent Productivity Interval Summary Report	Shows per-agent productivity metrics (active, idle, call handling, etc.) within a selected interval. Useful for tracking agent utilization and efficiency.	Inbound, Outbound
Agent Productivity Summary Report	Summarizes agent work and session details within a campaign. Enables supervisors to gauge agent contribution and performance consistency.	Inbound, Outbound

Report Name	Purpose	Applicable For
Agent Session Details Report	Details agent session activities including auto call on/off intervals and breaks—useful for availability analysis.	Inbound, Outbound
Call Details Report	Offers call-level visibility across the entire lifecycle (setup, ringing, connected, wrap-up). Useful for audits and quality checks.	Inbound, Outbound
Call Distribution Interval Report	Provides call summaries by type for specified intervals, helping analyze call patterns and load distribution.	Inbound, Outbound
Call Distribution Report	High-level call type summary for overall campaign analysis.	Inbound, Outbound
Call History Report	Tracks call handling across multiple users and transfers, providing end-to-end traceability of each call.	Inbound, Outbound
Lead Penetration Report	Summarizes outbound autodial activity—uploaded records, attempts, conversions, and callbacks—to track lead performance.	Outbound (Autodial only)
Queue Performance Report	Monitors queue-level metrics like AHT (Average Handle Time), AWT (Average Wait Time), and ATT (Average Talk Time) over intervals.	Inbound, Outbound (transferred calls)
Conference Report	Tracks all conference call activities initiated by agents to monitor collaboration efficiency.	Inbound, Outbound
Supervisor/QA Productivity Summary Report	Provides visibility into the performance of supervisors, group managers, and QA users managing agent operations.	All Campaigns

Report Name	Purpose	Applicable For
Calls Quality Report	Displays quality scoring results for calls, helping QA teams track evaluation trends.	All Campaigns

Insights & Use Cases

- **Operational Efficiency** – Identify bottlenecks such as queues with long AWT or high abandonment.
- **Agent Performance** – Assess agent productivity, adherence, and utilization across intervals.
- **Customer Experience** – Track SLA compliance and measure abandonment patterns.
- **Quality Assurance** – Evaluate call quality and supervisor performance through QA summary reports.
- **Sales & Lead Optimization** – Improve outbound performance with lead penetration analytics.

16.1.2.1.1. ACD Abandon Call Detail Report

Overview

The **ACD Abandon Call Detail Report** provides a detailed view of all **inbound or transferred calls** that were **abandoned at the ACD (queue)** level.

This report helps contact center managers analyze **queue wait times** and identify **service quality gaps** by showing how long customers waited before disconnecting.

Purpose

Use this report to:

- Track all abandoned calls within ACD queues.
- Measure the **average customer waiting time** before disconnection.
- Evaluate queue efficiency and **agent availability impact**.

Report Details

Column Name	Data Type	Description
#	Number	Sequential row number for each record in the report.
Call Time	Date & Time	Date and time when the call was missed or abandoned.
Campaign ID	String	ID of the campaign in which the call was received.
Campaign Name	String	Name of the campaign in which the call was abandoned.
Queue ID	String	ID of the queue where the call was abandoned.
Queue Name	String	Name of the queue where the call was abandoned.
Call ID	String	Unique identifier of the abandoned call.
Phone	String	Phone number from which the customer placed the call.
System Disposition	String	System-generated disposition status for the call.
IVR Time	Duration	Total time spent by the caller in the IVR before entering the queue.
Total ACD Wait Time	Duration	Time spent by the caller **in the final queue** before abandoning the call. If transferred across multiple queues, only the wait time of the **last queue** is shown.
ACD Wait Time in Queue	Duration	**Cumulative wait time** across all queues the call passed through before being abandoned.
Display Phone	String	Format of the customer's phone number displayed to the agent.
Unique Identifier	String	Used when **number masking** is enabled to hide customer phone numbers at the agent end.

Column Name	Data Type	Description
Other Filter Groups	String	Displays names of any **Other Filter Groups** associated with the call.
Applied Filter Group	String	The **Filter Group** applied or used during the call.
Table Filters	String	The **Table Filter** applied during the call session.

Additional Notes

- If a call is **Re-ACD** (re-queued) in the same queue, the additional queue time is included in the following metrics:
  - **ACD Wait Time in Queue**
  - **Total ACD Wait Time**
  - **Average ACD Wait Time in Queue**
  - **Total Abandoned After Target**
  - **Average Wait Time**

Usage Example

Supervisors can use this report to:

- Identify queues with high abandon rates.
- Assess performance against service-level targets (e.g., abandonment after threshold time).
- Optimize queue configuration or staffing to reduce waiting times.

Example Report

#	Call Time	Campaign ID	Campaign Name	Queue ID	Queue Name	Call ID	Phone	System Disposition	IVR Time	Total ACD Wait Time	ACD Wait Time in Queue	Display Phone	Unique Identifier	Other Filter Groups	Applied Filter Group	Table Filters
1	2025-10-21 09:10:34	CMP2001	TechSupport Inbound	Q001	TechQueue_1	CALL_40001	+91-9810054321	CUSTOMER_HANGUP_PHONE	00:00:30	00:01:25	00:01:25	9810XXXX21	UID_40001	Default Group	TechSupport	Queue=Tech
2	2025-10-21 09:15:48	CMP2002	Billing Enquiries	Q005	Billing_Main_Q	CALL_40002	+91-9820012345	CUSTOMER_HANGUP_UI	00:00:40	00:02:10	00:02:15	9820XXXX45	UID_40002	Billing	Default Group	SLA>60s
3	2025-10-21 09:22:09	CMP2003	Customer Care	Q010	CustCare_Q1	CALL_40003	+91-9890034567	SYSTEM_HANGUP	00:00:50	00:01:55	00:02:00	9890XXXX67	UID_40003	CustomerCare	CustCare	Queue=CustCare_Q1
4	2025-10-	CMP2	TechSup	Q001	TechQu	CALL	+91-98	CUSTOME	00:0	00:00:55	00:00:55	9870X	UID_	Default	TechSup	IVRPath=Short

#	Call Time	Campaign ID	Campaign Name	Queue ID	Queue Name	Call ID	Phone	System Disposition	IVR Time	Total ACD Wait Time	ACD Wait Time in Queue	Display Phone	Unique Identifier	Other Filter Groups	Applied Filter Group	Table Filters
	21 09: 34: 56	00 1	port Inbound		eue_2	_4 0 0 4	70 06 78 90	R_HANGUP_PHONE	0: 20			XXX 90	40 04	Group	port	
5	20 25- 10- 21 09: 40: 17	CMP2 004	Loan Support	Q01 5	Loan Queue_ Main	CALL_4 0 0 5	+91- 98 10 04 56 78	USER_CANCELLED_PREVIEW	00 :0 0: 45	00: 01: 40	00: 01:4 5	98 10 XX XX X78	UID_ 40 05	Banking	Loan_ Process	Queue=Loan
6	20 25- 10- 21 09: 52: 02	CMP2 005	Insurance Claims	Q01 3	Claims_ Hotline	CALL_4 0 0 6	+91- 98 70 09 87 65	CUSTOMER_HANGUP_UI	00 :0 0: 55	00: 02: 20	00: 02: 25	98 70 XX XX X 65	UID_ 40 06	Claims	Default Group	Status=Missed
7	20 25- 10- 21 10:	CMP2 006	Payments & Ref	Q01 7	Payment Qu	CALL_4 0	+91- 98 90 01	CUSTOMER_HANGU	00 :0 0: 25	00: 01:1 5	00: 01:2 0	98 90 XX X	UID_ 40 07	Finance	Payment Ops	SLA=Breached

#	Call Time	Campaign ID	Campaign Name	Queue ID	Queue Name	Call ID	Phone	System Disposition	IVR Time	Total ACD Wait Time	ACD Wait Time in Queue	Display Phone	Unique Identifier	Other Filter Groups	Applied Filter Group	Table Filters
	05:28		unds		eue	07	1223	P_PHONE				X23				
8	2025-10-21 10:12:49	CMP2007	Travel Assistance	Q019	Travel_Q	CALL_40088	+91-9810099988	CUSTOMER_HANGUP_PHONE	00:00:35	00:01:05	00:01:10	9810XXXX88	UID_40808	Travel	Default Group	Queue=Travel
9	2025-10-21 10:25:15	CMP2002	Billing Enquiries	Q005	Billing_Main_Q	CALL_40099	+91-9820022233	SYSTEM_MEDIA	00:00:45	00:01:30	00:01:35	9820XXXX33	UID_40909	Billing	Default Group	IVR=Billing Menu
10	2025-10-21 10:37:20	CMP2008	Retention Desk	Q020	Retention_Q	CALL_40110	+91-9810087776	CUSTOMER_HANGUP_UI	00:00:50	00:02:40	00:02:40	9810XXXX76	UID_41010	Retention	Default Group	Queue=Retention

Interpretation

- **Record #1 (TechSupport Inbound)** – Customer disconnected after 1m 25s of queue wait; short IVR duration (30s) indicates quick abandonment after hold.
- **Record #2 (Billing Enquiries)** – Call abandoned after 2m+ total wait; suggests queue congestion in Billing_Main_Q.
- **Record #6 (Insurance Claims)** – Longest total ACD wait (2m 25s), likely due to high call load in Claims_Hotline queue.
- **Record #10 (Retention Desk)** – Extended wait (2m 40s) – potential SLA breach if configured under 2 minutes.

16.1.2.1.2. ACD Abandon Call Summary Report

Overview

The **ACD Abandon Call Summary Report** provides a **campaign-level summary** of all inbound or transferred calls that were **abandoned in ACD queues**.

It highlights **where and how often customers disconnect** before being attended, helping supervisors identify **queues or campaigns with high abandon rates** and assess **service quality** across the contact center.

Purpose

Use this report to:

- Track abandoned call volumes across campaigns and queues.
- Identify queues with the **highest abandonment frequency**.
- Analyze **average customer wait time and IVR duration** for abandoned calls.
- Evaluate **contact center efficiency** and **service-level adherence**.

Report Details

Column Name	Data Type	Description
Campaign Name	String	Name of the campaign in which the call was abandoned.
Queue Name	String	Name of the **last queue** where the call was abandoned.
Abandon at ACD	Number	Total number of calls abandoned at the ACD (queue) level for that campaign.
Avg. IVR Time	Duration	Average time spent by callers in IVR before entering a queue and abandoning the call. If a call is transferred to IVR multiple times, only the time spent **before the last queue entry** is included.
Avg. ACD Wait Time in Queue	Duration	Average duration that calls waited in the **last queue** before being abandoned. Calculated as: *Total wait time of all abandoned calls in the queue ÷ Total number of abandoned calls in that queue.*
Avg. Queue Wait Time	Duration	Average **queue wait time** for calls that were transferred between multiple queues without being answered. Only the wait time of the **final queue** where the call was abandoned is counted.
Avg. Wait Time	Duration	Average wait time of all abandoned calls in the campaign. Calculated as: *Total wait time of all abandoned calls in the campaign ÷ Total number of abandoned calls in the campaign.*

Additional Notes

- This report shows **aggregated statistics** at the campaign level rather than individual call details.
- Supervisors can compare **average queue and campaign wait times** to determine which queues need staffing or routing optimization.
- If calls are transferred between multiple queues, only the wait time of the **final abandoned queue** contributes to averages.
- Visual charts (if enabled) such as *Average Queue Wait Time of Abandoned Calls* and *Average Wait Time of Abandoned Calls per Campaign* provide trend insights.

Use Case Examples

- **Performance Monitoring:** Identify campaigns where abandonment rates exceed SLA thresholds.
- **Queue Optimization:** Determine if longer queues correlate with higher abandonment.
- **Service Quality Tracking:** Compare abandonment behavior between IVR-heavy and direct-to-agent campaigns.

Example Report

Campaign Name	Queue Name	Abandon at ACD	Avg. IVR Time	Avg. ACD Wait Time in Queue	Avg. Queue Wait Time	Avg. Wait Time
TechAssist Inbound	Support_Queue_1	45	00:00:35	00:01:25	00:01:30	00:02:00
Billing Enquiries	Billing_Main_Q	28	00:00:40	00:01:40	00:01:55	00:02:20
Customer Care	CustCare_Queue_A	67	00:00:50	00:02:15	00:02:30	00:03:00
Loan Verification	Loan_Queue_2	32	00:00:30	00:01:10	00:01:25	00:01:45
TechSupport Premium	Premium_Support	18	00:00:20	00:00:55	00:01:05	00:01:25
Retention Desk	Retention_Q	54	00:00:45	00:01:35	00:01:45	00:02:10
Insurance Claims	Claims_Hotline	41	00:00:55	00:02:05	00:02:10	00:02:40
Travel Assistance	Travel_Help_Q	23	00:00:30	00:01:15	00:01:20	00:01:50
Payments & Refunds	Payment_Queue	39	00:00:25	00:01:00	00:01:10	00:01:35
Healthcare InfoLine	Health_Main_Q	58	00:00:50	00:02:00	00:02:20	00:02:55

Interpretation

- **Customer Care (CustCare_Queue_A)** shows the **highest number of abandoned calls (67)**, with an **average wait time of 3 minutes**, suggesting high queue congestion.
- **TechSupport Premium** has the **shortest average wait time (1m 25s)** – indicating effective staffing or low traffic.
- **Billing Enquiries** and **Insurance Claims** both show elevated **Avg. ACD Wait Time**, which may require queue rebalancing or additional agent allocation.

16.1.2.1.3. ACD Call Details

Overview

The **ACD Call Details Report** provides a comprehensive record of all **inbound or transferred calls** that reached the **ACD (Automatic Call Distributor)** or queue.

It offers **queue-level insights** that help supervisors and administrators analyze **call handling efficiency**, **agent performance**, and **queue behavior**.

This report identifies **which queue actually answered the call**, even if the call was transferred multiple times before being disposed.

If a call times out in one queue and is answered in another, the system attributes the answered event to the **final queue where the call was handled**.

Purpose

Use this report to:

- Analyze queue-level call handling performance.
- Measure customer wait times across multiple queues.
- Identify queues that frequently transfer or re-route calls.
- Understand how call handling impacts service levels.

Report Details

Column Name	Data Type	Description
#	Number	Sequential row number of each record.
Campaign Name	String	Name of the campaign to which the call belongs.
Phone	String	Customer's phone number from which the call was received.
DNIS	String	The **DID number** the customer dialed to reach the contact center.
Call Type	String	Type of call. Example: inbound.call.dial – a call received through an inbound campaign.
Call ID	String	Unique ID of the call. For transferred calls, a **new Call ID** is generated.
Answered / Hangup	String	Indicates whether the call was answered or hung up at ACD/IVR level.
Call Time	Date & Time	Timestamp when the call reached the contact center.
Queue ID	String	ID of the queue where the call was received.
Queue Name	String	Name of the queue where the call landed. For campaign calls, this may be blank.
Wait Time at ACD	Duration	Time the caller waited in the **current queue** before the call was answered. If transferred to multiple queues, only the wait time in the **final queue** is shown.
Total Wait Time	Duration	**Cumulative waiting time** across all queues before the call was answered. Includes all re-queues and transfers. If the call was re-queued in the same queue (Re-ACD), that duration is also included.

Column Name	Data Type	Description
Hangup Details	String	Specifies who disconnected the call. Possible values: USER_HANGUP_UI, SYSTEM_HANGUP, CUSTOMER_HANGUP_UI, CUSTOMER_HANGUP_PHONE, USER_HANGUP_PHONE, SYSTEM_MEDIA, USER_CANCELLED_PREVIEW.
Customer Hold Duration	Duration	Total time the customer was placed on hold by agents. If multiple agents handled the call, it sums all hold durations.
Actual Channel	String	The actual communication channel used for the call (voice, SIP, etc.).
Username	String	Name of the **first user** who answered the call. If multiple users handled it, only the first responder's name is displayed.
User Setup Time	Duration	Time between when the system dials the agent's extension and when it starts ringing. Not applicable for manual dial cases.
User Ringing Time	Duration	Ringing time for the first agent who answered the call.
User Talk Time	Duration	Duration of conversation by the first user, including hold time.
User Hold Duration	Duration	Duration the first user kept the customer on hold.
Cumulative User Talk Time	Duration	Total talk time across **all users** who participated in handling the call, even across queues.
ACW Duration	Duration	**After Call Work (ACW)** – Time spent by the first user completing post-call tasks before dispositioning.

Column Name	Data Type	Description
User Disposition Code	String	The **disposition code** selected by the first user while ending the call.
Call Notes	String	Agent notes or remarks entered during or after the call.
Display Phone	String	Format of the customer phone number as displayed to the agent.
Unique Identifier	String	Used for **number masking** to protect customer identity from agents.
Other Filter Groups	String	Names of any additional filter groups associated with the call.
Applied Filter Group	String	The **Filter Group** applied during the call.
Table Filters	String	The **Table Filter** used during the call session.

Additional Notes

- **First Answered Queue Logic:**
  - If a call is **answered after transfer**, it is attributed to the **final queue**.
  - If **unanswered in initial queues**, the report still reflects only the **final answered queue**.
- **Re-ACD Handling:**Re-queued calls within the same queue are treated as a continuous session, and their wait times are aggregated.
- **Hang-up Cause Mapping:**Useful for identifying whether disconnects were **agent-, system-, or customer-initiated**.

Use Case Examples

- **Supervisors** can identify queues with higher hold or wait durations.
- **Admins** can track agent response patterns and post-call behavior (ACW).
- **Quality teams** can correlate disposition codes with call outcomes to enhance routing logic.

Example Report

#	Campaign Name	Phone	DNIS	Call Type	Call ID	Answered/Hangup	Call Time	Queue ID	Queue Name	Wait Time at ACD	Total Wait Time	Hangup Details	Customer Hold Duration	Actual Channel	User name	User Setup Time	User Ringing Time	User Talk Time	User Hold Duration	Cumulative User Talk Time	ACW Duration	User Disposition Code
1	Tech Support Inbound	+91-9810012345	18001023456	inbound.call.dial	CALL_30001	Answered	2025-10-21 09:12:15	Q001	Tech Queue_1	00:00:45	00:00:45	CUSTOMER_HANGUP_PHO	00:00:30	SIP	A. Mehta	00:03	00:05	04:15	00:25	04:15	00:45	ISSUE_RESOLVED

												NE									
2	Loan Inquiry	+91-9870087654	18002004567	inbound.call.dial	CALL_3002	Answered	2025-10-22 09:22:08	Q005	Loan Support_Q	00:01:10	00:01:10	USER_HANGUP_UI	00:00:55	Web RTC	R. Sharma	00:02	00:06	05:20	00:35	05:20	01:10	LOAN_ELIGIBILITY_SHARED
3	Collections	+91-9890012345	18602003456	inbound.call.dial	CALL_3003	Customer Hangup	2025-10-22 09:35:	Q007	Payment Queue	00:02:10	00:02:15	CUSTOMER_HANG	00:00:40	SIP	S. Iyer	00:04	00:08	03:40	00:40	03:40	00:55	PAYMENT_PROMI

		45					48					UP_UI										SED
4	Sales Outbound	+91-9820045678	18003005678	outbound.manual.dial	CALL_3004	Answered	2025-10-21 10:05:22	-	-	-	-	USER_HANGUP_PHONE	00:01:10	SIP	P.Singh	00:01	00:03	06:15	00:45	06:15	01:05	SALE_CONFIRMED

5	Retention	+91-9810021122	18004002345	inbound.call.dial	CALL_3005	Answered	2025-10-15 10:15:39	Q009	Retention_Q	00:01:25	00:01:40	SYSTEM_HANGUP	00:00:20	WebRTC	M. Verma	00:03	00:04	03:30	00:30	03:30	00:50	CUSTOMER_RETAINED
6	Support	+91-98	18001010	transfere	CALL_3	Answer	2025-10	Q011	Escalatio	00:02:00	00:02:30	USER_C	00:01:05	SIP	D. Nair	00:05	00:07	07:00	00:55	07:10	01:20	ESCALA

	Escalation	7004512 3	07890	d.to.camp aign.dial	006	ed	-211 0:42: 55		n_Q			ANCELLED_PREVIEW										TED_TO_L2
7	Billing Enquiry	+91-9810067890	18601006789	inbound.call.dial	CALL_3007	Customer Hangup	2025-10-211 0:55:42	Q010	Billing_Main_Q	00:02:25	00:02:40	CUSTOMER_HANGUP_PHONE	00:00:15	SIP	K.Gupta	00:04	00:06	02:10	00:15	02:10	00:35	BILL_QUERY_PENDING

8	TechSupportInbound	+91-9890023344	18001001234	inbound.call.dial	CALL_3008	Answered	2025-10-21 11:05:21	Q001	TechQueue_1	00:00:40	00:00:40	SYSTEM_MEDIA	00:00:30	SIP	A.Mehta	00:02	00:05	05:10	00:40	05:10	01:00	ISSUE_RESOLVED
9	TravelAs	+91-98	18002	inbound.	CALL_3	Answer	2025-10	Q012	Travel_Q	00:01:35	00:01:40	CUSTOM	00:00:45	SIP	T.Das	00:03	00:04	04:30	00:35	04:30	00:55	TRAVEL

	sist	2007891 2	03456	call.dial	009	ed	-211 11:20:18					ER_HANGUP_PHONE										_BOOKED
10	Insurance Claims	+91-9870066543	1800501234	inbound.call.dial	CALL_3010	Answered	2025-10-211 11:35:50	Q013	Claims_Hotline	00:01:50	00:02:00	SYSTEM_HANGUP	00:00:50	SIP	R.Patel	00:04	00:06	06:45	00:50	06:45	01:15	CLAIM_INITIATED

Interpretation

- **Call #1 (TechSupport)** – Customer call answered within 45 seconds; agent “A. Mehta” resolved the issue with minimal hold time.
- **Call #3 (Collections)** – Customer disconnected while discussing payment, recorded as CUSTOMER_HANGUP_UI.
- **Call #6 (Support Escalation)** – Transfer call with long handling duration (7+ minutes) and escalation disposition.
- **Call #10 (Insurance Claims)** – Longest user talk time (6m 45s) – typical of complex claim interactions.

16.1.2.1.4. ACD Call Interval Summary Report

Overview

The **ACD Call Interval Summary Report** provides summarized insights for **all inbound and transferred-to-campaign calls** that reached the **ACD (Automatic Call Distributor)** within a user-defined **time interval**.

It displays both **connected** and **abandoned** call statistics for the selected timeframe – allowing supervisors to evaluate **SLA adherence**, **call handling efficiency**, and **queue-level service performance**.

With this report, users can easily identify:

- How many calls were connected or abandoned.
- Which calls met or breached SLA targets.
- Queue and campaign performance across intervals.

Purpose

Use this report to:

- Measure contact center performance over specific time intervals.
- Track connected vs. abandoned call trends.
- Assess SLA achievement rates and queue efficiency.
- Identify high-abandonment queues requiring optimization.

Report Details

Column Name	Data Type	Description
Interval Start	Time	The start time of the data collection interval defined by the user.
Interval End	Time	The end time of the data collection interval defined by the user.
Process Name	String	Name of the process (workflow) receiving calls.
Campaign Name	String	Campaign under which the calls were received.
Queue Name	String	Name of the queue where calls were routed during the interval.
Total Received Calls	Number	Sum of **Connected Calls**, **Abandoned Calls at ACD**, and **Abandoned Calls at Ringing** in the queue during the specified interval. $\text{Total Received Calls} = \text{Total Answered Call} + \text{Total Abandoned Calls at ACD} + \text{Total Abandoned Calls at Ringing} + \text{Transfer to Campaign Calls}$ Figure: Total Received Calls in the interval
Total Connected Calls	Number	Total number of calls answered and disposed of by agents during the interval.
Total Abandoned Calls at ACD	Number	Total number of calls abandoned after reaching the ACD (includes ringing and queue abandons). Excludes IVR abandons. $\text{Total Abandoned Calls after reaching ACD} = \text{Total Abandoned Calls at ACD} + \text{Total Abandoned Calls at Ringing}$ Figure: Total Abandoned Calls after reaching ACD
Total Connected in Target	Number	Number of calls answered within the **campaign's target wait time** (SLA threshold).
Total Connected Calls at ACD in Target	Number	Number of calls answered **at queue level** within the target wait time.

Column Name	Data Type	Description
Total Connected After Target	Number	Calls answered **after exceeding** the campaign-level SLA wait time.
Total Connected Calls at ACD After Target	Number	Calls answered **at queue level** after exceeding the target wait time.
SLA %	Percentage	SLA Calculation: $$SLA = \frac{\text{Total Connected Calls at ACD in Target} \times 100}{\text{Total Connected Calls}}$$ Figure: Calculation of SLA
Answered %	Percentage	Percentage of calls answered = (Total answered ÷ Total received or dropped) × 100.
Total Abandoned Before Target	Number	Calls abandoned before reaching the configured SLA wait time (talk time = 0).
Total Abandoned Calls at ACD in Target	Number	Calls abandoned at ACD before reaching the target queue wait time.
Total Abandoned After Target	Number	Calls abandoned after exceeding the total campaign wait time.
Total Abandoned Calls at ACD After Target	Number	Calls abandoned at ACD after exceeding queue-level wait time.
Abandoned %	Percentage	Abandoned Percentage is equal to the total calls abandoned at the last ACD divided by the total received calls at that ACD queue in the specified interval.

Column Name	Data Type	Description
		$$\text{Abandoned (\%)} = \frac{\text{Abandoned Calls at Last ACD}}{\text{Total Offered Calls at Queue}} \text{ X } 100$$ Figure: Calculation of Abandoned Percentage Here, Total Received Calls at the queue includes both inbound calls and Transfer to Campaign calls. Here, Total Received Calls at the queue includes both inbound calls and Transfer to Campaign calls. $$\text{Abandoned (\%)} = \frac{\text{Abandoned Calls at Last ACD}}{\text{Total Inbound Calls + Total Transfer to Campaign Calls}} \text{ X } 100$$ Figure: Detailed Calculation of Abandoned Calls Percentage
Abandoned Call on Agent	Number	Calls abandoned while the agent's phone was ringing.
Total Short Calls	Number	Calls first answered in the queue but lasted ≤10 seconds.
Total Talk Time	Duration	Cumulative talk time of all first-answered calls during the interval.
ACD Wait Time in Queue	Duration	Total time calls waited in queue(s) before being answered or dropped. Includes transfers and re-queues.
Total ACD Wait Time	Duration	Aggregate queue wait duration for all calls in the interval (includes multi-queue transfers).
Avg. Talk Time	Duration	Average agent talk time = (Total talk time of a user ÷ Total answered calls of a user).
Total Hold Duration	Duration	Total duration customers were placed on hold during calls in the interval.
Max. Hold Time	Duration	Maximum hold time among all calls with hold during the interval.
Min. Hold Time	Duration	Minimum hold time among all calls with hold during the interval.

Column Name	Data Type	Description
Avg. Hold Duration	Duration	Average hold time = (Total hold time ÷ Total calls with hold).
Total Hold Count	Number	Number of calls where customers were placed on hold at least once (multiple holds in same call count as one).
Oldest Call Waiting	Duration	Longest customer wait time before being answered.
Total Wrap Time	Duration	Total post-call wrap-up time spent by users after call disconnection.
Total Handling Time	Duration	Combined time spent handling calls = **Talk Time + Hold Time + Wrap Time**.
Avg. Handling Time (AHT)	Duration	Average Handling Time = **Avg. Talk Time + Avg. ACW Duration**. Does not include Average Wrap Time.

Performance Metrics Explained

- **SLA %** → Percentage of calls answered within the target wait time.
- **Answered %** → Ratio of answered calls to total received.
- **Abandoned %** → Ratio of abandoned calls to total received at queue.
- **Avg. Handling Time (AHT)** → Average time an agent spends per call, excluding wrap-up of not-connected calls.

If a call is **Re-ACD'd (re-queued)** in the same queue, the additional wait time is included in:

- **Total Served in Target**
- **Total Served After Target**
- **Total Abandoned Before/After Target**
- **Total ACD Wait Time**
- **ACD Wait Time in Queue**
- **Longest Wait Time**

Use Case Examples

Persona	How They Use This Report
Supervisors	Identify queues failing to meet SLAs or with increasing abandon rates.
Admins	Monitor load balancing efficiency and adjust routing thresholds.
Quality Managers	Correlate talk, hold, and handling times with SLA adherence.

Example Report

Interval Start	Interval End	Processed Name	Campaign Name	Queue Name	Total Received Calls	Total Connected Calls	Total Abandoned Calls	Total Connected Calls at ACD	Total Connected Calls in Target	Total Connected Calls at ACD in Target	Total Connected Calls After Target	SLA%	Answered%	Total Abandoned After Target	Total Connected Calls at ACD in Target	Total Abandoned Calls at ACD in Target	Total Abandoned Calls at ACD After Target	Abandoned%	Abandoned Call Agent	Total Short Calls	Total Talk Time	ACD Wait Time in Queue	Total ACD Wait Time
09	10	Inb	Te	Te	15	12	2	11	10	1	2	80	83	5	5	1	1	13	4	8	06:	01:3	01:5

:00	:00	oundSupport	chAssist	chQueue_1	0	50	0	0	0	5	5	%	%			5	5	%			20:00	5:00	0:00
10:00	11:00	InboundSupport	TechAssist	TechQueue_1	160	130	22	115	108	15	22	83%	81%	4	6	18	16	14%	3	7	07:05:00	01:45:00	02:00:00
09:00	10:00	CustomerCare	Cust Care_Main	Cust Care_Q1	200	175	18	160	150	15	25	85%	88%	5	6	13	12	9%	5	6	08:30:00	01:50:00	02:10:00
10:	11:00	Custo	CustC	CustC	230	200	20	170	165	30	35	82%	87%	6	5	14	15	8%	7	5	09:20:	02:05:	02:25:

00		merCare	are_Main	are_Q1																	00	00	00
09:00	10:00	LoanServices	LoanDesk	LoanQueue	120	90	25	75	70	15	20	75%	75%	10	8	15	17	21%	6	10	05:20:00	01:25:00	01:40:00
10:00	11:00	LoanServices	LoanDesk	LoanQueue	130	100	24	85	80	15	20	77%	77%	9	7	15	17	18%	7	9	06:05:00	01:35:00	01:55:00
09:00	10:00	BillingOperatio	Billing2025	BillQueue_Main	180	150	22	135	125	15	25	83%	83%	8	7	14	15	12%	5	8	07:40:00	01:55:00	02:15:00

		ns																				
10:00	11:00	Billing Operations	Billing 2025	Bill Queue_Main	190	160	20	140	135	20	25	81%	84%	7	8	13	12	10%	4	9	08:10:00	02:05:00	02:25:00
09:00	10:00	Travel Support	Travel Desk	Travel_Q	140	120	15	110	100	10	20	85%	86%	3	4	12	11	11%	2	6	06:25:00	01:30:00	01:45:00
10:00	11:00	Travel Support	Travel Desk	Travel_Q	150	130	17	115	108	15	22	83%	86%	4	3	13	14	11%	3	7	07:00:00	01:40:00	01:55:00

Interpretation

- **TechAssist (09:00–10:00)** – SLA performance at **80%**, meaning 80% of calls were answered within the target wait time; only **13% abandoned**.
- **CustCare_Main (10:00–11:00)** – High connection efficiency (**87% Answered**), with **Avg. Talk Time 2m 48s** and short hold durations – SLA well maintained.
- **LoanDesk (09:00–10:00)** – Lower SLA (75%) and higher abandon rate (21%) – indicates queue congestion or insufficient staffing.
- **Billing2025 (10:00–11:00)** – Consistent SLA (81%) and moderate handling time (~5.5 min average).
- **TravelDesk** queues show strong performance with minimal abandon rates and good SLA adherence (~85%).

16.1.2.1.5. ACD Call Summary Report

Overview

The **ACD Call Summary Report** provides an overall summary of all **inbound** or **transferred-to-campaign** calls that reached the **ACD (Automatic Call Distributor)** or queue.

This report gives users visibility into **connected** and **abandoned call performance**, including **SLA adherence**, **wait times**, and **agent handling efficiency**.

Supervisors can use it to evaluate **queue performance**, monitor **abandon rates**, and ensure that service-level objectives are consistently met.

Purpose

Use this report to:

- Track **total connected vs. abandoned calls** per queue or campaign.
- Measure **SLA achievement** at both campaign and queue levels.
- Identify queues with **high abandonment** or **low connection rates**.
- Monitor **average talk, wait, and handling times** to optimize operations.

Report Details

Column Name	Data Type	Description
Process Name	String	Name of the process (workflow) receiving calls.
Campaign Name	String	Campaign under which the calls were received.
Queue Name	String	Name of the queue where the calls were routed.
Total Received Calls	Number	It is the sum of Total Answered Calls (sum of all Inbound Calls and Transfer to Campaign calls), Total Abandon the calls at ACD, and Total Abandon at Ringing Calls in the queue.
Total Connected Calls	Number	Total calls answered and disposed of by users.
Total Abandoned Calls at ACD	Number	Calls abandoned after reaching ACD (includes ringing and abandoned calls at ACD; excludes IVR abandons).
Total Connected in Target	Number	Calls answered **within the target wait time** defined for the campaign.
Total Connected Calls at ACD in Target	Number	Calls answered **within target wait time at queue level**. If a call transfers from Queue 1 to Queue 2 and is answered in Queue 2 before exceeding Queue 2's wait time, it is not counted as "In Target" at campaign level since total campaign wait time exceeded.

Column Name	Data Type	Description
Total Connected After Target	Number	Calls answered after exceeding the campaign's target wait time.
Total Connected Calls at ACD After Target	Number	Calls answered after exceeding the queue's target wait time. `If a call has arrived in Queue 1 and has been sent automatically to another Queue 2 (after reaching a specific timeout) and answered in Queue 2 before exceeding its queue wait time, then the call will not be included in "Total Queue Served Calls in Target" . It is because the total wait time of campaign was not met, rather it was met for Queue 2.`
SLA %	Percentage	**SLA Achievement** = (Connected Calls at ACD in Target × 100) ÷ Total Received Calls.
Connected %	Percentage	Percentage of calls answered = (Total answered in queue ÷ Total calls first answered or last dropped in queue) × 100.
Total Abandoned Before Target	Number	Calls abandoned **before** reaching the configured SLA wait time at campaign level.
Abandoned %	Percentage	**Abandon Rate** = (Calls abandoned at last ACD ÷ Total received calls at that ACD queue) × 100. Includes inbound and transfer-to-campaign calls.

Column Name	Data Type	Description
Abandoned Call on Agent	Number	Number of calls abandoned while the agent's phone was ringing.
Total Abandoned Calls at ACD in Target	Number	Calls abandoned in queue **before** reaching target wait time.
Total Abandoned After Target	Number	Calls abandoned in campaign **after exceeding** total campaign wait time.
Total ACD Abandoned Calls After Target	Number	Calls abandoned at queue **after exceeding** target wait time.
Total Short Calls	Number	Calls first answered in queue with **talk time ≤10 seconds**.
Total Talk Time	Duration	Cumulative talk time of all first-answered calls in the queue.

Column Name	Data Type	Description
Total Wait Time	Duration	Cumulative wait time across all queues before calls were answered or dropped (includes auto-transfers).
Wait Time at ACD	Duration	Time spent waiting in the **final queue** where the call was answered or dropped.
Avg. Talk Time	Duration	Average agent talk time = (Total talk time ÷ Total answered calls).
Total Hold Duration	Duration	Total time customers were placed on hold in all calls during the period.
Max. Hold Time	Duration	Longest single hold duration in the queue.
Min. Hold Time	Duration	Shortest hold duration in the queue.
Avg. Hold Duration	Duration	Average hold time = (Total hold time ÷ Calls with hold).
Total Hold Count	Number	Number of calls where customers were put on hold (counted once per call, even if held multiple times).
Oldest Call Waiting	Duration	Longest waiting time before a call was answered.

Column Name	Data Type	Description
ACW Duration	Duration	**After Call Work (ACW)** - Time spent by agent on post-call actions before disposition.
Total Handling Time	Duration	Total time spent handling calls = **Talk Time + Hold Time + Wrap Time**.
Avg. Handling Time (AHT)	Duration	Average Handling Time = **Avg. Talk Time + Avg. ACW Duration**. Excludes wrap-up of not-connected calls.

Performance Indicators

Metric	Meaning
SLA %	Measures how many calls were answered within SLA-defined wait time.
Connected %	Shows overall connection efficiency at queue level.
Abandoned %	Indicates percentage of calls dropped before being answered.
Avg. Handling Time (AHT)	Measures overall agent efficiency, combining talk and ACW durations.

If a call is **Re-ACD'd (re-queued)** in the same queue, the additional wait time is included in:

- **Total Served in Target / After Target**
- **Total Abandoned Before / After Target**
- **Total ACD Wait Time**
- **ACD Wait Time in Queue**
- **Longest Wait Time**

Use Case Examples

Persona	Usage
Supervisors	Monitor SLA performance and queue-level efficiency.
Admins	Identify system-level call flow bottlenecks.
Quality Managers	Compare handling, talk, and abandon rates across campaigns.

Example Report

Process Name	Campaign Name	Queue Name	Total Received Calls	Total Connected Calls	Total Abandoned Calls at ACD	Total Abandoned in Target	Total Calls at ACD in Target	Total Calls at ACD After Target	Total Connected Calls at ACD After Target	SLA %	Connected %	Total Abandoned %	Abandoned Calls at ACD	Abandoned Calls at ACD in Target	Total Abandoned After Target	Total Abandoned Calls at ACD After Target	Total Calls Short Calls	Total Talk Time	Total Wait Time	Wait Time at ACD	Avg. Talk Time	Total Hold Duration
Inb	Tee	Tee	32	27	3	24	23	3	4	72	84	1	11	5	8	1	1	9	14:	01:4	01:1	00:	00

oundSupport	chAssistInbound	chQueue_1	0	0	5	0	0	0	0	%	%	0	%			5	2		45:00	0:00	0:00	03:16	:45:00
InboundSupport	TechAssistInbound	TechQueue_2	280	240	30	210	200	300	400	71%	86%	8	11%	6	7	14	11	10	13:20:00	01:35:00	01:05:00	00:03:20	000:42:00
CustomerCare	CustCare_Main	CustCare_Q1	410	370	25	340	330	300	400	80%	90%	7	6%	4	6	18	15	8	18:00:00	02:05:00	01:30:00	00:02:55	000:40:00

CustomerCare	CustCare_Main	CustCare_Q2	385	340	300	3000	285	400	455	74%	88%	9	8%	5	8	21	17	11	17:25:00	02:10:00	01:35:00	00:03:05	00:48:00
BillingOperations	Billing2025	BillQueue_Main	345	295	355	2600	245	355	400	71%	85%	12	10%	6	9	16	13	10	15:30:00	01:55:00	01:20:00	00:03:09	00:43:00
BillingOperations	Billing2025	BillQueue_2	310	275	28	2500	240	25	355	77%	89%	7	9%	4	6	15	12	9	14:15:00	01:45:00	01:15:00	00:03:06	00:41:00
Loan	Loan	Loan	275	220	400	1800	165	400	55	60%	80%	15	15%	8	10	25	20	12	13:40:	02:25:	01:45:	00:03:	00:55:

Services	Desk	Queue																00	00	00	43	00
Travel Support	Travel Desk	Travel_Q	300	270	200	250	245	200	25	81%	90%	5	7%	3	4	12	10	7	14:00:00	01:30:00	01:10:00	00:03:06	00:39:00
Insurance Claims	Claims_Process	Claims_Hotline	290	250	300	220	210	300	400	72%	86%	8	10%	5	7	15	13	9	13:10:00	02:00:00	01:25:00	00:03:09	00:44:00
Retention P	Retention D	Retention	265	230	25	200	190	300	35	72%	87%	7	9%	4	6	13	11	8	12:30:00	01:35:00	01:10:00	00:03:16	00:42:00

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Interpretation

- **TechAssist Inbound (TechQueue_1)** – SLA achievement at **72%**, good performance but slightly below ideal 80% target. **11% Abandon Rate** suggests minor queue congestion.
- **CustCare_Main (CustCare_Q1)** – Strong efficiency with **SLA 80%** and **6% abandon rate**, supported by a quick **Avg. Wait Time (1m 30s)** and healthy **Connected % (90%)**.
- **LoanDesk (LoanQueue)** – SLA (60%) and Abandon % (15%) are the lowest among all, indicating a capacity shortfall or long hold durations.
- **TravelDesk (Travel_Q)** – Best-performing queue with **SLA 81%** and **Avg. Handling Time of 5m 10s**.
- **Billing2025** queues demonstrate stable performance (SLA ~75%) but slightly higher abandonment compared to Customer Care.

16.1.2.1.6. Agent Productivity Interval Summary Report

16.1.2.1.7. Agent Productivity Summary Report

16.1.2.1.8. Agent Session Details Report

16.1.2.1.9. Call Details Report

16.1.2.1.10. Call Distribution Interval Summary Report

16.1.2.1.11. Call Distribution Report

16.1.2.1.12. Call History Report

16.1.2.1.13. Lead Penetration Report

16.1.2.1.14. Queue Performance Report

16.1.2.1.15. Conference Report

16.1.2.1.16. Supervisor, Group Manager, and QA Productivity Summary Report

Overview

The **Supervisor, Group Manager, and QA Productivity Summary Report** provides a consolidated view of the performance and productivity of **non-agent roles** in a contact center - including **Supervisors, Group Managers, and Quality Analysts (QA)**.

While most reports focus on **agent performance**, this report enables **contact center leaders** to evaluate how effectively their supervisory and QA teams manage agents, monitor calls, and perform quality assurance activities.

It summarizes their **call intervention activities** (Snoop, Barge, Whisper, and Confer), **QA scoring actions**, and **overall engagement time** across campaigns. This helps leadership teams assess operational efficiency, identify high-performing supervisors, and detect areas for coaching or process improvement.

Purpose

Use this report to:

- Track **supervisory engagement** through snoop, barge, whisper, and conference activities.
- Measure **QA scoring productivity** across voice logs.
- Understand **time distribution** between supervision, collaboration, and breaks.
- Evaluate how effectively supervisory staff are **supporting agent performance** and **ensuring quality control**.

Report Fields

Column Name	Data Type	Definition
Process ID	Number	Unique identifier of the process where the user monitored or engaged in calls.
Process Name	String	Name of the process under which the supervisor or QA performed the call activity.
Campaign ID	Number	Unique identifier of the campaign associated with the monitored or engaged calls.
Campaign Name	String	Name of the campaign in which the user performed supervisory or QA actions.
User Name	String	Name of the **Supervisor**, **Group Manager**, or **QA Analyst** whose activities are being tracked.
User ID	String	System-generated ID of the Supervisor, Group Manager, or QA Analyst.
Total Snoop Count	Number	Total number of calls in which the user **snooped** (silently listened) to an ongoing agent call for quality or coaching purposes.
Total Barge Count	Number	Total number of calls in which the user **barged** (actively joined) an agent's call to assist with issue resolution.
Total Whisper Count	Number	Total number of calls in which the user **whispered** (guided the agent privately without the customer hearing).
Total Confer Count	Number	Total number of calls in which the user **conferred** with the agent and customer simultaneously during an active call.
Total Voice Logs Scored	Number	Total number of **voice recordings (voicelogs)** evaluated and scored by the user during the reporting period.
Total Snoop Talk Time	Duration	Cumulative duration of time spent by the user while snooping agent calls.
Total Barge Talk Time	Duration	Total time spent by the user while barging into live agent calls.
Total Whisper Talk Time	Duration	Total duration of all whisper sessions initiated by the user.

Column Name	Data Type	Definition
Total Confer Talk Time	Duration	Total time spent by the user during conference sessions with agents and customers.
Total Snoop Ringing Time	Duration	Total ringing time consumed before the **Snoop** session was established.
Total Barge Ringing Time	Duration	Total ringing time consumed before the **Barge** session was connected.
Total Whisper Ringing Time	Duration	Total ringing time consumed before the **Whisper** session was connected.
Total Confer Ringing Time	Duration	Total ringing time consumed before the **Conference** session was connected.
Total Time Spent in Campaign	Duration	Aggregate time the user spent in all assigned campaigns during the reporting period. This includes active monitoring and participation time.
Total Break Duration	Duration	Total time the user was marked as “On Break” within the reporting period.
Average Snoop Talk Time	Duration	Average snoop duration per call. **Formula:** Total Snoop Talk Time ÷ Total Snoop Count
Average Barge Talk Time	Duration	Average barge duration per call. **Formula:** Total Barge Talk Time ÷ Total Barge Count
Average Whisper Talk Time	Duration	Average whisper duration per call. **Formula:** Total Whisper Talk Time ÷ Total Whisper Count
Average Confer Talk Time	Duration	Average conference duration per call. **Formula:** Total Confer Talk Time ÷ Total Confer Count

How to Interpret the Report

Each row in this report corresponds to an individual **Supervisor**, **Group Manager**, or **QA Analyst**.

By reviewing the report, contact center leaders can quickly determine:

- How **proactively** supervisors are engaging with live calls.
- Whether **QA scoring volumes** align with organizational targets.
- How much time is spent in **active monitoring vs. idle or break periods**.
- Which managers are most involved in **agent coaching and escalations**.

Example Scenario

User Name	Total Snoop Count	Total Barge Count	Total Whisper Count	Total Confer Count	Voice Logs Scored	Total Time in Campaign	Total Break Duration
Priya Sharma	12	5	8	3	20	7h 45m	40m

Interpretation:

- Priya actively monitored agent performance, snooping into 12 calls and scoring 20 voicelogs.
- She used whisper mode for coaching 8 times and barged into 5 calls for escalations.
- Total campaign activity time of **7 hours 45 minutes** shows healthy engagement, while **40 minutes of break** is within normal productivity range.

Key Metrics and Their Importance

Metric	Significance
Snoop Count & Talk Time	Indicates proactive quality monitoring and silent supervision of agent interactions.
Barge Count & Talk Time	Reflects hands-on involvement in resolving customer issues during live calls.
Whisper Count & Talk Time	Highlights direct coaching and in-the-moment agent support.
Confer Count & Talk Time	Measures collaboration and multi-party resolution scenarios.
Voice Logs Scored	Represents post-call quality evaluation efforts by QA or supervisors.
Total Campaign Time vs. Break Duration	Offers insight into engagement balance and time utilization efficiency.

Best Practices

- Encourage supervisors to maintain a **healthy balance** between live monitoring (Snoop/Barge/Whisper) and QA scoring.
- Use **Average Talk Time metrics** to evaluate efficiency in handling interventions.
- Compare **Voice Logs Scored** across teams to measure QA throughput and fairness in evaluations.
- Regularly review **Total Campaign Time** to identify underutilized supervisory capacity.
- Correlate this report with the **Agent Productivity Summary Report** for holistic team performance assessment.

16.1.2.1.17. Calls Quality Report

Overview

The **Calls Quality Report** provides detailed information about all **scored calls** within a campaign.

It consolidates the data of **Quality Analysts' (QA) reviews**, including **call details**, **review metadata**, and **assigned scores**, allowing supervisors and QA teams to track agent performance, identify training needs, and monitor compliance against quality benchmarks.

Each row in this report represents a **scored call review**. It enables leadership to assess **quality trends** across users, campaigns, and QA reviewers.

Purpose

Use this report to:

- Track **quality evaluations** across campaigns and agents.
- Review the **scoring distribution** and **performance trends** over time.
- Identify **low-scoring interactions** for coaching and corrective actions.
- Monitor QA **reviewer performance** and **timeliness** of call evaluations.
- Ensure **quality compliance** and **standardization** across different campaigns.

Report Fields

Column Name	Column Type	Definition
Call ID	Mandatory	Unique identifier of each call. Every call in the system has a distinct Call ID.
Review ID	Mandatory	Unique identifier for each QA review conducted on a call.
User ID	Mandatory	System-generated ID of the agent who handled the call.
User Name	Optional	Name of the agent who attended the call.
User Type	Optional	Role of the user (e.g., Agent, Supervisor, QA Analyst).
Campaign ID	Optional	Unique ID of the campaign where the call was handled.
Campaign Name	Mandatory	Name of the campaign in which the call was handled and reviewed.
Max Score	Mandatory	Maximum possible QA score for the review, as defined in the QA evaluation form.
Calculated Score	Mandatory	The actual score obtained by the agent. If the score falls below a predefined threshold, it is highlighted using **color coding** (e.g., red for below threshold).
Reviewed By	Mandatory	ID of the **Quality Analyst** who reviewed and scored the call.
Review Time	Mandatory	Timestamp indicating when the QA review was completed.

QA Evaluation Metrics

This section of the report details the parameters used during scoring for each reviewed call.

Column Name	Column Type	Definition
Min Score	Mandatory	Minimum score possible for a given QA criterion. Applicable for range-based evaluation parameters.
Max Score	Mandatory	Maximum score possible for a given QA criterion. Applicable for range-based evaluation parameters.
Score	Mandatory	The **actual score** assigned by the QA reviewer. For **Boolean** or **Multiple Choice** parameters, this field shows the selected option.
Weightage	Mandatory	Weightage assigned to the criterion as per the QA evaluation form. Helps calculate the **overall weighted QA score**.

How to Interpret the Report

This report is typically used by **QA Managers** and **Supervisors** to:

- View **who scored** each call and **when**.
- Compare **actual vs. maximum achievable scores**.
- Identify **agents or campaigns** with consistent low QA scores.
- Ensure **objectivity and standardization** in QA assessments.
- Review **reviewer workload and efficiency** across the QA team.

Example

Call ID	User Name	Campaign Name	Max Score	Calculated Score	Reviewed By	Review Time
12456	Anjali Mehta	XPrime Outbound	100	85	QA_103	2025-10-14 15:32:21
12459	Raj Kumar	XPrime Inbound	100	62 *(Flagged)*	QA_107	2025-10-14 17:45:08

Interpretation:

- *Anjali Mehta* achieved **85/100**, indicating good performance.
- *Raj Kumar's* score **62/100** is below the defined threshold, triggering a **flag for review**.

- Both calls were reviewed by different analysts within the same campaign.

Key Insights Derived

Insight	Description
Average QA Score	Measures overall agent performance across all evaluated calls.
Score Variance by QA Reviewer	Helps ensure scoring consistency between multiple analysts.
Low Score Patterns	Highlights specific behaviors or processes needing retraining.
Review Timeliness	Tracks how promptly QA evaluations are completed post-call.

16.1.3. Chat

16.1.3.1. Chat Reports

Overview

The **Chat Reports** section in the **Ameyo Archiving and Reporting Tool (ART)** provides a comprehensive set of reports designed to track, analyze, and optimize agent performance and customer interactions conducted over **chat-based campaigns**.

In an **omnichannel contact center**, where chat plays a vital role in customer engagement, these reports help leaders, supervisors, and quality analysts monitor **agent efficiency**, **channel utilization**, and **conversation quality** across multiple chat platforms (such as WhatsApp, web chat, or in-app chat).

Each report offers unique insights into chat operations – from individual chat details to overall productivity and performance trends.

Available Chat Reports

Report Name	Definition	Applicable For
Agent Chat Report	Provides a **high-level summary** of agent performance on chat interactions. It includes key metrics such as the **number of chats handled**, **average handling time**, and **chat response efficiency**. This report helps supervisors identify top-performing agents and track productivity across teams.	**Supervisors**, **Team Leads**, **Operations Managers**
Chat Agent Productivity Report	Presents a **user-wise summary** of chat activity and agent session data. It measures how effectively an agent utilizes working hours – showing the **time spent handling chats**, **idle time**, and **number of concurrent chats managed**. It delivers a **360° visibility** of an agent's productivity during the selected time frame.	**Supervisors**, **Performance Analysts**, **QA Teams**
Chat Channel Report	Offers visibility into all **chat communication channels** through which customer conversations are initiated (e.g., Website, WhatsApp, Facebook Messenger). This report helps leaders understand **channel usage trends** and **distribution of chat volume** across platforms, enabling data-driven decisions on resource allocation and channel optimization.	**Contact Center Managers**, **Channel Leads**, **Operations Teams**
Chat Detail Report	Provides a **detailed breakdown** of each chat interaction received or initiated within a campaign. Each row represents a **unique chat instance** and includes information such as **chat start/end time**, **handling agents**, and **response details**. If multiple agents handled a single chat, each handover is represented as a separate row. This report gives a **360° view** of chat interactions and their handling history.	**Supervisors**, **Quality Analysts**, **Audit Teams**

Why These Reports Matter

Together, these reports provide a unified view of chat operations, enabling:

- **Performance tracking** across individual agents and teams.
- **Operational transparency** across multiple chat channels.

- **Quality and response time analysis** for continuous improvement.
- **Workload management** and **resource optimization** based on real-time data.

Supervisors and contact center leaders can leverage these insights to **improve customer experience**, **streamline chat routing**, and **optimize agent utilization** in multi-channel environments.

Best Practices for Using Chat Reports

- Regularly monitor the **Chat Agent Productivity Report** to balance agent workload and prevent burnout.
- Use the **Chat Channel Report** to analyze channel engagement trends and forecast traffic spikes.
- Review **Chat Detail Reports** weekly for audit and QA purposes.
- Combine insights from **Agent Chat Reports** and **Voice Reports** to evaluate true omnichannel performance.

16.1.3.1.1. Agent Chat Report

Overview

The **Agent Chat Report** provides a detailed summary of agent activity and performance across all chat interactions handled within a campaign.

It allows supervisors and managers to measure how effectively each agent engages with customers, how long chats are taking to resolve, and the quality of customer feedback received.

By consolidating chat session metrics – including **response behavior**, **average handling time**, and **feedback ratings** – this report offers a 360° view of **agent productivity and service quality** in chat-based customer support.

Purpose

Use this report to:

- Measure **individual agent performance** in chat-based campaigns.
- Track **responsiveness and chat handling efficiency**.
- Identify agents with **low engagement or response delays**.
- Evaluate **customer feedback trends** and **overall chat experience**.
- Understand **chat volume distribution** by duration segments.

Report Fields

Column Name	Data Type	Definition
#	Number	Row number of each record in the report.
Agent ID	String	Unique identifier of the agent handling the chat.
Total Staffed Duration	Duration	Total duration for which the agent was staffed in the campaign, including break times. *Figure: Total Staffed Duration*
Total Ready Duration	Duration	Total duration for which the agent was available and active for chat handling. Calculated as the sum of the durations for which the user was in “Ready” or “Active” status across sessions. *Figure: Total Ready Duration*
No. of Chats Assigned	Number	Total number of chats assigned to the agent during the reporting period.
No. of Chats Served	Number	Total number of chats successfully handled (served) by the agent in the campaign.
Chat Not Responded Count	Number	Total number of assigned chats where the agent did not respond within the campaign.
Avg. Chat Duration	Duration	Average time spent by the agent on each chat. **Formula:** Total Chat Time ÷ Total Chats Answered
Count of No Feedback Chats	Number	Total number of chats where no customer feedback was received after chat closure.

Column Name	Data Type	Definition
Count of Feedback	Number	Total number of chats for which customer feedback was received.
Avg. Feedback Rating	Number	Average rating received by the agent across all chats with feedback. *Figure: Calculation of Average Feedback Rating*
No. of Chats < 1 Minute	Number	Number of chat sessions that lasted less than one minute.
No. of Chats (1–5 Minutes)	Number	Number of chat sessions with durations between 1 and 5 minutes.
No. of Chats > 5 Minutes	Number	Number of chat sessions lasting more than five minutes.
% of Chats < 1 Minute	Percentage	Percentage of chats shorter than one minute. **Formula:** (Chats < 1 min ÷ Total Chats with Duration) × 100
% of Chats (1–5 Minutes)	Percentage	Percentage of chats lasting between 1 and 5 minutes. **Formula:** (Chats 1–5 min ÷ Total Chats with Duration) × 100
% of Chats > 5 Minutes	Percentage	Percentage of chats lasting more than 5 minutes. **Formula:** (Chats > 5 min ÷ Total Chats with Duration) × 100

How to Interpret the Report

- **Staffed vs Ready Duration** helps managers identify how much time an agent was available versus actively handling chats.

- **Chat Not Responded Count** highlights missed opportunities and can indicate workload issues or agent inactivity.
- **Average Chat Duration** provides insight into chat efficiency – extremely short chats may indicate quick resolutions or missed engagement opportunities.
- **Feedback Metrics** reveal customer satisfaction levels and help evaluate service quality at an individual agent level.
- **Duration Segments and Percentages** offer visibility into chat complexity trends (e.g., higher 5+ minute chats may suggest detailed support conversations).

Example

Agent ID	No. of Chats Served	Avg. Chat Duration	Chat Not Responded Count	Avg. Feedback Rating	% of Chats > 5 Min
AGT_2021	87	4m 12s	3	4.6	28%
AGT_3045	73	3m 02s	5	4.2	19%

Interpretation:

- *AGT_2021* managed more chats and maintained higher feedback ratings, indicating strong performance.
- *AGT_3045* shows slightly lower efficiency with higher idle and short-duration chats, suggesting a need for coaching or workflow review.

Key Insights

Metric	What It Indicates
Staffed vs Ready Duration	Availability balance – higher ready time indicates better utilization.
No. of Chats Served	Measures total workload handled by the agent.
Chat Not Responded Count	Helps identify delayed or missed responses.
Avg. Chat Duration	Determines handling efficiency and complexity of conversations.
Avg. Feedback Rating	Reflects customer satisfaction with the agent's service quality.
Duration Segments (%)	Provides distribution of chat handling patterns for performance benchmarking.

Best Practices

- Regularly review **Chat Not Responded** counts to ensure SLAs are met.
- Use **Average Feedback Rating** as a key KPI for customer experience.
- Identify top and bottom performers using **Avg. Chat Duration** and **Feedback Scores** trends.
- Use chat duration segmentation to plan training and optimize staffing levels.
- Combine this report with **Chat Agent Productivity Report** for a full picture of agent workload and engagement.

16.1.3.1.2. Chat Agent Productivity Report

Overview

The **Chat Agent Productivity Report** provides a detailed, user-wise summary of **agent activity and performance** across all chat sessions within a specified time interval.

This report helps supervisors evaluate how effectively each agent utilized their working hours – how much time they were staffed, actively handling chats, or idle.

It gives a **360° view of agent productivity**, response behavior, and overall efficiency in managing chat interactions.

Purpose

Use this report to:

- Measure agent utilization during chat operations.
- Identify idle or underutilized time across shifts.
- Analyze **response speed**, **chat handling time**, and **feedback quality**.
- Benchmark agent performance for productivity tracking and optimization.

Report Fields

Column Name	Data Type	Definition
#	Number	Denotes the row number for each entry in the table.
Agent Name	String	Name of the user (agent) handling chat interactions in the campaign.
Agent ID	String	Unique identifier of the agent associated with the chat sessions.
Total Staffed Duration	Duration	Total time duration for which the agent was logged into and staffed in the campaign, including break times. *Figure: Total Staffed Duration*
Total Ready Duration	Duration	Total time duration during which the agent was active and available to handle chats. Calculated as the sum of durations in both **Auto-Call On** and **Auto-Call Off** states across sessions. *Figure: Total Ready Duration*
Total Chat Offered	Number	Total number of chat sessions offered to the agent in the selected campaign and interval.
Total Chat Served	Number	Total number of chat sessions successfully handled (served) by the agent.
Total Chat Not Responded	Number	Total number of chat sessions assigned to the agent that were **not responded to**.
Total Chat Transferred to Agent	Number	Total number of chat sessions that were transferred to the agent from another user.

Column Name	Data Type	Definition
Avg. First Response Time	Duration	Average time taken by the agent to send the first response to a new customer message across all served chat sessions.
Avg. Chat Duration	Duration	Average total time spent by the agent in serving each chat session. **Formula:** Total Chat Duration ÷ Total Chats Served
Avg. Feedback Score	Number	Average of all customer feedback scores received for chats handled by the agent. *Figure: Calculation of Average Feedback Score*

How to Interpret the Report

- **Total Staffed Duration vs Total Ready Duration** → Helps determine the proportion of active working time versus total logged-in time.
- **Total Chat Offered vs Served** → Indicates agent responsiveness and chat handling rate.
- **Total Chat Not Responded** → Highlights potential idle time, disengagement, or high load.
- **Average First Response Time** → A key indicator of chat service quality – shorter times represent faster response and better customer experience.
- **Average Chat Duration** → Reflects the complexity or efficiency of conversations. Consistently long durations may require workflow review or escalation handling analysis.
- **Average Feedback Score** → Provides insight into customer satisfaction for each agent, helping supervisors identify training or recognition opportunities.

Example

Agent Name	Total Chats Served	Avg. Chat Duration	Avg. First Response Time	Avg. Feedback Score
Aditi Sharma	74	3m 45s	18s	4.6
Rajesh Nair	59	5m 12s	42s	4.1
Priya Mehta	63	4m 08s	25s	4.8

Interpretation:

- *Aditi Sharma* demonstrates fast responses and high customer satisfaction.
- *Rajesh Nair* may need coaching on faster response and chat resolution.
- *Priya Mehta* maintains balanced handling time and feedback – a benchmark performer.

Key Insights

Metric	Indicates
Staffed Duration	Total logged-in time in campaign.
Ready Duration	Time agent was available to take chats.
Chats Served	Actual volume of handled chat sessions.
First Response Time	Speed of response to customers.
Chat Duration	Efficiency in resolving queries.
Feedback Score	Customer satisfaction and service quality.

Best Practices

- Monitor **Average First Response Time** to ensure SLA adherence.
- Regularly track **Not Responded Chats** to identify disengaged agents.
- Use **Average Feedback Score** to recognize top performers and reward customer satisfaction.
- Compare **Chat Duration Trends** to balance workloads among agents.

- Combine this report with **Agent Chat Report** for a full view of utilization and performance.

16.1.3.1.3. Chat Channel Report

Overview

The **Chat Channel Report** provides a comprehensive summary of chat interactions across different communication channels within a campaign.

In an **omnichannel contact center**, it is critical to understand which channels (such as Web Chat, WhatsApp, Facebook Messenger, etc.) are most active and how effectively agents are engaging customers on each of them.

This report enables **contact center leaders and supervisors** to monitor chat distribution by channel, identify high-traffic touchpoints, and assess agent performance across multiple queues and campaigns.

Purpose

Use this report to:

- Identify which **channels generate the highest chat traffic**.
- Evaluate **agent responsiveness** and **service efficiency** per channel.
- Analyze **missed chats**, **wait times**, and **customer satisfaction** trends.
- Optimize resource allocation across chat queues and campaigns.

Report Fields

Column Name	Data Type	Definition
Setup ID	String	*(Only for Central ART Setup)* – Displays the Setup ID of the Ameyo Server managing chat communication.
Setup Name	String	*(Only for Central ART Setup)* – Displays the unique name of the Ameyo Server handling the chat sessions.
#	Number	Denotes the row number for each entry in the table.
Campaign Name	String	Name of the campaign under which the chat interaction occurred.
Campaign ID	String	Unique identifier of the campaign in which the chat interaction was handled.
Channel Name	String	Name of the **chat channel** through which the customer initiated the conversation (e.g., Web Chat, WhatsApp, Messenger, SMS).
Queue Name	String	Name of the queue where the chat interaction was received.
Queue ID	String	Unique identifier of the queue handling the chat.
Total Chat Received	Number	Total number of chat requests received within the queue.
Total Chat Served	Number	Total number of chat sessions successfully handled by agents.
Total Chat Missed	Number	Total number of chat sessions that were **not served** (missed) by any agent within the campaign.
Total Chat Missed in Queue	Number	Number of chats missed within the specific queue.
Total Chat Missed by the Agent	Number	Number of chats missed or not attended by individual agents in the queue.
Unique Customers	Number	Total number of **unique customers** whose chats were successfully served.

Column Name	Data Type	Definition
Connected		
Unidentified Customers Connected	Number	Total number of chats handled with **unidentified customers** (where customer ID was not available).
Avg. Queue Wait Time	Duration	Average waiting time for chats before being picked up by an agent in the queue.
Avg. FRT (First Response Time)	Duration	Average time taken by agents to send the **first response** to incoming chats in the queue.
Avg. Duration of Chat	Duration	Average total duration of all chat sessions handled during the reporting interval.
Feedback Rating (%)	Number	Average of all customer feedback ratings received for chats handled through the channel.
% of Total Chat Traffic	Percentage	Proportion of total chat volume handled by this channel compared to overall chat traffic.
Top 1st Disposition Code	String	The **most frequently used** disposition code for chats closed through this channel.
Top 1st Disposition %	Percentage	Percentage of chats closed using the top disposition code. **Formula:** (Chats with Top 1st Disposition ÷ Total Chats Offered) × 100
Top 2nd Disposition Code	String	The **second most frequently used** disposition code for chats.
Top 2nd Disposition %	Percentage	Percentage of chats closed using the second most used disposition code.
Top 3rd Disposition Code	String	The **third most frequently used** disposition code for chats.
Top 3rd Disposition %	Percentage	Percentage of chats closed using the third most used disposition code.

How to Interpret the Report

- **Channel Name** helps determine which digital platforms (e.g., WhatsApp vs. Web Chat) generate the most engagement.
- **Chat Missed Metrics** indicate potential staffing gaps or delayed agent responses.
- **Average FRT (First Response Time)** reflects responsiveness – a critical measure of chat service efficiency.
- **Average Queue Wait Time** reveals how long customers wait before an agent responds.
- **Disposition Codes** highlight the most common chat outcomes, such as "Resolved," "Follow-Up," or "Callback Required."
- **Feedback Rating (%)** shows customer satisfaction trends per channel.

Example

Channel Name	Total Chats Received	Chats Served	Avg. FRT	Avg. Duration	Feedback Rating (%)	% of Total Traffic
Web Chat	342	328	22s	4m 10s	4.6	48%
WhatsApp	267	259	18s	5m 05s	4.8	37%
Facebook Messenger	104	97	27s	3m 44s	4.4	15%

Interpretation:

- *WhatsApp* yields the highest satisfaction and fastest response times – a strong performing channel.
- *Web Chat* handles the largest volume but may need optimization to reduce response delay.
- *Messenger* volume is low but consistent, useful for targeted engagement campaigns.

Key Insights

Metric	What It Indicates
% of Total Chat Traffic	Channel utilization – identifies which platforms generate most customer interactions.
Avg. Queue Wait Time	Customer waiting experience before engagement.
Avg. FRT	Agent responsiveness to incoming chats.
Avg. Chat Duration	Complexity and nature of conversations handled per channel.
Feedback Rating (%)	Customer satisfaction per channel.
Top Disposition Codes	Most frequent chat outcomes – useful for quality analysis and training focus.

Best Practices

- Use this report to **balance workload** across heavily and lightly used channels.
- Track **FRT and Queue Wait Time** to maintain SLAs across all channels.
- Identify **channel-specific performance gaps** and reallocate staffing accordingly.
- Monitor **top disposition codes** to understand recurring reasons for chat closure.
- Correlate **feedback ratings** with specific channels to refine your omnichannel engagement strategy.

16.1.3.1.4. Chat Detail Report

Overview

The **Chat Detail Report** provides comprehensive information about every chat interaction initiated and received by the system within a campaign.

Each row in this report represents a **unique chat session**, capturing all critical parameters – from the customer source and handling queue to response times, duration, and agent engagement details.

If a single chat was handled by multiple agents (e.g., due to transfers), it will be represented by **multiple rows**, one per agent or queue transition.

This report offers **360° visibility into all chat interactions**, enabling supervisors and analysts to assess handling efficiency, response performance, and missed chat trends.

Key Concepts

- **Missed in Queue**Chats that remained **unassigned** and were **disconnected** before being picked up by any agent.These typically represent customers who abandoned the session while waiting in queue.
- **Missed by Agent**Chats that were **assigned** to an agent but **disconnected** by the customer (or in some cases, ended by the agent) before engagement was completed.

Purpose

Use this report to:

- Audit all incoming and outgoing chat interactions at a granular level.
- Identify customer experience gaps caused by **long wait times** or **unattended chats**.
- Track **agent performance** across chat handling, transfers, and responsiveness.
- Improve queue allocation, channel efficiency, and SLA compliance.

Report Fields

Column Name	Data Type	Definition
#	Number	Row number for each entry in the report.
Campaign ID	String	Unique identifier of the campaign in which the chat interaction occurred.
Chat ID	String	Unique identifier for the chat session represented in the row.
Chat Time	String	Date and time when the chat arrived in the contact center system.
Queue Name	String	Name of the queue where the chat was initially routed or handled.
Queue ID	String	Unique identifier of the queue associated with this chat.
Customer Name	String	Name of the customer engaged in the chat session. This field may remain blank if the customer is unidentified.
Email	String	Email address of the customer engaged in the chat (if provided).
Phone	String	Phone number of the customer associated with the chat session.
Customer ID	String	Unique identifier of the customer in the CRM or contact database.
Source	String	The originating channel or platform from which the chat was initiated (e.g., Web Chat, WhatsApp, Messenger).
Chat Status	String	Current or final status of the chat interaction: • **Served:** Chat was successfully attended by an agent. • **Missed:** Chat was not served and disconnected.
Served By	String	Name of the agent who attended the chat session.

Column Name	Data Type	Definition
Agent First Response Time	Duration	Time taken by the agent to send the first response to the customer after the chat was assigned.
Total Customer Wait Time	Duration	Total duration the customer waited during the chat lifecycle. If the chat was transferred between queues, this includes cumulative wait time across all transfers.
Total Chat Duration	Duration	Total time duration of the chat session from initiation to closure.
Disposition	String	Final outcome or reason for chat closure, as selected by the agent (e.g., “Resolved,” “Callback,” “Escalated”).
Number of Agents Who Handled This Chat	Number	Total number of agents involved in handling this chat, including transfers between queues.
Chat Type (Transferred/Requested)	String	Indicates whether the chat was a **requested chat** (initiated by the customer) or a **transferred chat** (forwarded from another agent or queue).

How to Interpret the Report

- **Chat Time & Queue Details** → Track chat inflow by time and distribution across queues to identify busy intervals.
- **Customer Wait Time & First Response Time** → Reveal operational bottlenecks and response efficiency.
- **Total Chat Duration** → Measures overall engagement time – longer durations may indicate complex interactions or slower handling.
- **Chat Status (Served/Missed)** → Quantifies customer experience quality and service accessibility.
- **Disposition Analysis** → Helps determine the outcome and nature of chats (e.g., resolved, follow-up needed, missed).
- **Multi-Agent Handling** → Highlights chats requiring collaboration or escalation, which may need workflow optimization.

Example

Chat ID	Customer Name	Source	Queue Name	Chat Status	Served By	Agent FRT	Total Chat Duration	Disposition
CHT-10245	Priya Sharma	Web Chat	Sales Queue	Served	Rajesh Nair	15s	4m 23s	Resolved
CHT-10248	Rahul Verma	WhatsApp	Support Queue	Missed	–	–	–	–
CHT-10252	Sneha Kapoor	Web Chat	Escalation Queue	Served	Aditi Mehta	42s	6m 18s	Callback Scheduled

Key Insights

Metric	What It Indicates
Agent First Response Time (FRT)	Measures promptness in engaging new chats.
Total Customer Wait Time	Reflects customer experience before response.
Total Chat Duration	Represents handling time and complexity of conversation.
Missed in Queue / Missed by Agent	Identify unserved chats and potential capacity issues.
Number of Agents per Chat	Tracks handoffs and collaboration levels.
Disposition Trends	Provides insight into the nature and resolution of chats.

Best Practices

- Regularly monitor **FRT and Wait Times** to maintain SLA adherence.
- Analyze **missed chats** by queue or agent to address staffing or process gaps.
- Evaluate **multi-agent chats** to improve transfer efficiency.
- Use **disposition data** to categorize customer intent and refine support workflows.

- Combine this with the **Chat Channel Report** to correlate channel performance with agent responsiveness.

16.1.4. Tickets

16.1.4.1. Ticketing Reports

Overview

The **Ticketing Reports** section of the *Ameyo Archiving and Reporting Tool (ART)* provides detailed insights into **interaction-based campaigns** such as tickets, feedback sessions, and customer communications.

These reports help supervisors, administrators, and quality analysts monitor, analyze, and improve **customer interaction handling**, **SLA compliance**, and **feedback management** across the contact center.

Each report under this section offers a unique perspective – from ticket-level insights to SLA analysis and daily activity summaries – ensuring complete operational visibility.

Available Reports

Report Name	Definition	Applicable For
Feedback Report	Provides detailed information on all interactions along with their associated feedback data. Administrators must configure **Feedback Schemas** in the backend. While generating this report, users can select the required schema to include specific feedback parameters. **Applicable Options: Created in selected time duration:** Includes interactions created within the chosen period.**Closed in selected time duration:** Includes interactions closed within the chosen period.**Created or Closed in selected time duration:** Includes interactions that were either created or closed within the chosen period. If custom fields are configured and mapped to the selected interaction campaign, those fields will also appear in the report. *(This definition assumes "Created or Closed in selected time duration" as the selected option, with no custom fields included.)*	Interaction Campaigns with Feedback Configurations
Interaction Activity Daily Report	Provides a **daily summary of all interactions** grouped by campaign and queue. It shows how each interaction originated, tracks transfers between users or queues, and displays the **current state of each interaction**. This report enables contact center leaders to monitor daily workflow patterns and interaction routing efficiency.	All Interaction Campaigns
Interaction Details Report	Offers a **360° view of all tickets** within a campaign, including creation and closure details, SLA status, and overall ticket lifecycle visibility. **Applicable Options: Created in selected time durationClosed in selected time durationCreated or Closed in selected time duration** Like the Feedback Report, any custom fields configured for the campaign will appear automatically in this report. *(This document assumes "Created or Closed in selected time duration" is selected, with no custom fields included.)*	Ticket-based Interaction Campaigns

Report Name	Definition	Applicable For
Interaction Service Level Report	Displays **SLA compliance metrics** for interactions across different queues and campaigns. Supervisors can quickly identify **achieved vs. breached SLA cases** and monitor SLA trends across processes. This report provides a **comprehensive SLA performance view**, helping improve adherence and customer satisfaction.	Interaction Campaigns with SLA Tracking
Transition Daily Report	Offers detailed visibility into the **transitions of interactions** across various queues and campaigns, including SLA adherence metrics. It helps track how interactions moved through different states and whether each stage met or breached SLA thresholds. This report complements the SLA Report by focusing on **interaction state transitions** and **operational efficiency**.	Interaction Campaigns with Workflow Transitions

Purpose of Interaction Reports

These reports collectively enable contact center managers and process owners to:

- Gain **real-time visibility** into all customer interactions.
- Track **SLA compliance** and identify delayed or breached cases.
- Analyze **feedback and customer experience trends**.
- Audit **interaction routing and transfer efficiency**.
- Optimize **agent productivity and queue distribution**.

Report Usage Examples

Objective	Recommended Report
Measure feedback scores and identify low-performing processes	Feedback Report
Review all ticket interactions created or closed during a specific day/week	Interaction Details Report
Monitor queue load and interaction origin per day	Interaction Activity Daily Report
Analyze SLA compliance trends by campaign	Interaction Service Level Report
Track interaction movement and SLA status during each transition	Transition Daily Report

16.1.4.1.1. Feedback Report

Overview

The **Feedback Report** provides comprehensive details of all customer interactions, including their **core ticket information** and **associated feedback data**.

It helps contact center leaders and quality analysts measure **customer satisfaction (CSAT)**, monitor **agent performance**, and evaluate how effectively customer issues are resolved.

Administrators can configure **Feedback Schemas** in the backend to define the set of feedback questions presented to customers. The corresponding responses and scores are then captured and displayed in this report.

Report Configuration

Before generating the report, administrators must:

- **Create and configure Feedback Schemas** in the backend.
- **Select the appropriate schema** while generating the report.
- Optionally, **define custom fields** within an Interaction Campaign to include additional data columns.

If custom fields are assigned to the campaign, they will automatically appear in the generated report.

Applicable Filters

You can generate this report for the following interaction types:

- **Created in selected time duration**Generates a report for interactions created within the specified time frame.
- **Closed in selected time duration**Generates a report for interactions closed within the specified time frame.

- **Created or Closed in selected time duration** *(Recommended)* Generates a report for all interactions either created or closed during the specified time frame.

Note: For this documentation example, the option **“Created or Closed in selected time duration”** is used, and no **custom fields** are included.

Report Fields

Column Name	Data Type	Definition
#	Number	Row number for each entry in the report.
Ticket ID	Number	Unique system-generated ID of the ticket.
Custom ID	Number	Customized ticket ID (if configured by the Administrator). Appears only when a custom ticket format is enabled.
Created On	Date & Time	Date and time when the ticket was created.
Campaign Name	String	Name of the campaign under which the ticket was created.
Campaign ID	String	Unique identifier of the campaign under which the ticket was created.
Queue Name	String	Name of the queue where the ticket originated or is being handled.
Queue ID	String	Unique identifier of the queue associated with the ticket.
Channel	String	Source channel of the customer interaction (e.g., Email, Web, Chat, WhatsApp).
Last Modified	Date & Time	Date and time when the ticket was last updated or modified.
External State	String	The **external (final)** state of the ticket, such as *Open*, *In Progress*, or *Closed*.
Internal State	String	The **sub-state** of the ticket within the external state. For example: *External State = "Closed"*; *Internal State = "Resolved"* or *"Unresolved."*
Ticket Priority	String	Indicates the current **priority level** assigned to the ticket (e.g., High, Medium, Low).
Ticket Subject	String	Subject or summary of the interaction (e.g., email subject or chat issue title).

Column Name	Data Type	Definition
Time to Assign	Duration	Time taken to assign the ticket to an agent after creation.
Customer ID	String	Unique identifier of the customer who initiated the interaction.
Time to Response	Duration	Time taken for the first agent response after ticket creation.
Agent	String	Name of the agent currently assigned to the ticket.
Customer Name	String	Name of the customer who raised the ticket or query.
Closed On	Date & Time	Date and time when the ticket was closed.

Feedback Columns

The following columns appear based on the **Feedback Schema** selected during report generation.

Each feedback question and corresponding score column is displayed in pairs:

Column Name	Data Type	Definition
How would you rate your overall experience with Support Desk	String	Customer's answer to the question regarding their overall support experience.
Score	String	The numeric rating or score given by the customer for the above question.
Has this issue been fully resolved to your satisfaction?	String	Customer's response to whether the issue was completely resolved.
Score	String	Numeric score associated with the resolution satisfaction question.
Rate customer support executive on being knowledgeable	String	Customer's feedback on the agent's product or service knowledge.
Score	String	Numeric score given by the customer for the above question.
CSAT	String	Calculated **Customer Satisfaction Score**, representing overall customer feedback value.
Comment	String	Text comments or remarks submitted by the customer along with the feedback.

Note: The **"Score"** column is automatically generated for each feedback question in the selected schema. The values and questions may vary based on the **custom Feedback Schema** configured by the Administrator.

How to Use This Report

- Track **customer satisfaction trends (CSAT)** across campaigns and queues.
- Identify **top-performing agents** and **areas of improvement** through customer ratings.
- Compare **Time to Response** and **Resolution Scores** to measure support efficiency.
- Review **customer comments** for qualitative insights beyond numeric ratings.
- Export data to correlate feedback results with **SLA and handling performance reports**.

Example

Ticket ID	Customer Name	Agent	Channel	Created On	Closed On	CSAT	Overall Experience	Resolved to Satisfaction?	Knowledgeable Agent Score
13457	Priya Sharma	Rakesh Gupta	Email	12/07/2025 14:10	12/07/2025 17:22	4.8	Excellent	Yes	5
13468	Aman Verma	Simran Kaur	Chat	12/07/2025 15:00	12/07/2025 16:02	3.6	Satisfactory	Yes	3
13481	Kavita Menon	Suresh Rao	WhatsApp	12/07/2025 14:45	12/07/2025 18:11	2.4	Poor	No	2

Key Insights

Metric	Interpretation
CSAT	Aggregated satisfaction score representing overall customer experience.
Response Time vs. Feedback Score	Helps evaluate whether faster responses lead to higher satisfaction.
Knowledgeable Score	Reflects the effectiveness of agent training and domain expertise.
Resolution Feedback	Measures issue closure quality and first-contact resolution rates.
Customer Comments	Offer qualitative insights for process improvement and customer sentiment tracking.

Best Practices

- Regularly monitor **CSAT and resolution scores** to identify process or training gaps.

- Filter by **campaign or queue** to pinpoint underperforming areas.
- Use **customer comments** for root-cause analysis and coaching insights.
- Combine this with the **Interaction Service Level Report** for a full view of performance vs. satisfaction.
- Periodically review and update **Feedback Schemas** to align with business objectives.

16.1.4.1.2. Interaction Activity Daily Report

Overview

The **Interaction Activity Daily Report** provides a **daily, queue-wise and campaign-wise summary** of all interactions handled within the contact center.

It offers end-to-end visibility into each interaction's lifecycle – from creation and assignment to transfers, merges, and closures. This report helps supervisors and administrators understand the **distribution, workload, and progress of interactions** across teams and queues.

It is an essential report for tracking **daily operational efficiency**, **routing effectiveness**, and **ticket handling activity** across the organization.

Key Insights

This report helps users to:

- Monitor **daily interaction volumes** per campaign and queue.
- Track how interactions are **created, assigned, transferred, or closed**.
- Identify **automation vs. manual intervention** in ticket assignment.
- Analyze **transfer trends** (to agents or queues) to optimize routing rules.
- Review **internal collaboration** through merge, split, and internal note metrics.

Report Fields

Column Name	Data Type	Definition
#	Number	Row number for each entry in the report.
Date	Date	The date on which the interaction activity occurred.
Campaign Name	String	The name of the campaign where the interaction took place.
Queue Name	String	The name of the queue where the interaction was created, transferred, or handled.
Interactions Handled	Number	Total number of interactions handled (created, assigned, transferred, or closed) during the specified day.
New Created	Number	Number of **newly created interactions** on the given date.
System Assigned	Number	Count of interactions **automatically assigned** to agents by the system based on routing logic.
Supervisor Assigned	Number	Count of interactions **manually assigned** to agents by supervisors.
Interactions Picked	Number	Number of interactions **manually picked** by agents themselves from the queue.

Column Name	Data Type	Definition
Transferred to Queue	Number	Number of interactions **transferred from one queue to another** for further handling.
Transferred to Agent	Number	Number of interactions **transferred directly to a specific agent** by another user or supervisor.
Transferred From Queue	Number	Number of interactions **automatically transferred** from one queue to another after exceeding a timeout threshold (when not attended in the initial queue).
Merged	Number	Number of interactions that were **merged** into other interactions (e.g., duplicate tickets combined).
Splitted	Number	Number of **previously merged interactions** that were later **split back** into separate tickets.
Closed	Number	Number of interactions that were **successfully closed** on that day.
Expired	Number	Number of interactions marked as **expired**. An interaction is considered expired if its creation time exceeds the configured expiry duration and its status is *Closed*. • **Default Expiry Time:** 366 days • **Recommended Minimum:** Greater than 90 days
Internal Notes	Number	Number of **internal notes** added to tickets by agents or supervisors for collaboration, documentation, or escalation tracking.

Understanding Key Metrics

Metric	Description / Purpose
New Created	Helps identify incoming workload volume for the day.
System vs. Supervisor Assigned	Distinguishes between automated ticket distribution and manual supervisory intervention.
Transferred to Queue / Agent	Indicates workflow efficiency and routing logic performance. High values may suggest queue overload or improper assignment logic.
Merged / Splitted	Reflects ticket quality and duplication trends. Frequent merges can indicate duplicate ticket creation from multiple channels.
Closed / Expired	Measures closure rate and ticket lifecycle efficiency. Expired tickets may signal backlog or delayed resolution.
Internal Notes	Reflects team collaboration activity and transparency in issue resolution.

Example

Date	Campaign Name	Queue Name	New Created	System Assigned	Supervisor Assigned	Transferred to Queue	Transferred to Agent	Closed	Expired	Internal Notes
2025-07-12	Technical Support	L1 Queue	245	210	12	30	15	198	5	46
2025-07-12	Sales Inquiry	CRM Queue	160	120	8	10	22	130	0	18
2025-07-12	Billing Support	Payments Queue	98	85	3	12	6	82	1	10

Use Cases

- **Supervisors:** Track daily ticket inflow, assignments, and queue performance.
- **Administrators:** Audit ticket routing and system automation effectiveness.
- **Operations Managers:** Monitor workload distribution and closure efficiency across campaigns.
- **Quality Analysts:** Identify reassignments, transfers, or collaboration indicators through internal notes and merged/split data.

Best Practices

- Regularly review **Transferred to Queue/Agent** metrics to refine routing rules.
- Monitor **Expired** and **Closed** counts to maintain SLA adherence.
- Use **Internal Notes** trends to gauge agent collaboration and coaching needs.
- Combine this report with the **Interaction Details Report** for deeper ticket-level visibility.

16.1.4.1.3. Interaction Details Report

Overview

The **Interaction Details Report** provides a comprehensive overview of all **tickets** (or **interactions**) created within a specific campaign.

It offers complete **360° visibility** into each ticket's lifecycle – from creation to closure – including details such as ticket ownership, SLA timelines, and customer information.

Supervisors and administrators can use this report to:

- Track the **current status** of every ticket.
- Review **SLA compliance** for assignment, first response, and resolution.
- Identify tickets that were **reopened, delayed, or closed** within the selected duration.

Report Configuration Options

You can generate this report based on the **interaction creation and closure timeframes**:

- **Created in selected time duration**Generates a report for all interactions created within the chosen date range.
- **Closed in selected time duration**Generates a report for all interactions closed within the chosen date range.
- **Created or Closed in selected time duration** *(Recommended)*Generates a report that includes all interactions that were either created or closed during the specified time frame.

If **Custom Fields** have been configured and assigned to the campaign, their data will also appear as additional columns in this report.

Note: This documentation assumes that the report is generated using the **"Created or Closed in selected time duration"** option, with **no Custom Fields** included.

Report Fields

Column Name	Data Type	Definition
#	Number	Sequential row number for each record in the report.
Ticket ID	Number	Unique identifier automatically generated for each ticket.
Custom ID	Number	Custom ticket ID configured by the Administrator (appears only when custom ticketing is enabled).
Ticket Subject	String	Subject line or topic associated with the ticket or customer communication.
Created On	Date & Time	Date and time when the ticket was created.
Created By	String	Name of the user or agent who created the ticket.
Campaign Name	String	Name of the campaign under which the ticket was created.
Campaign ID	String	Unique ID of the campaign under which the ticket was created.
Queue Name	String	Name of the queue where the ticket originated or is being handled.
Queue ID	String	Unique identifier of the queue assigned to the ticket.
Channel	String	Source of the interaction (e.g., Email, Chat, WhatsApp, Web, or Social Media).
Last Modified	Date & Time	Date and time when the ticket was last updated.
Status	String	Current status of the ticket (e.g., Open, In Progress, Closed, Pending).
Agent	String	Name of the agent currently assigned to handle the ticket.
Ticket Priority	String	Indicates the priority level of the ticket (e.g., High, Medium, Low).
Assign Time SLA	Duration	SLA target duration within which the ticket should be assigned to an agent.

Column Name	Data Type	Definition
Time to Assign	Duration	Actual time taken to assign the ticket to an agent after its creation.
First Response SLA	Duration	SLA target duration for the agent's first response to the customer.
Time to Response	Duration	Actual time taken by the agent to send the first response.
Resolve Time SLA	Duration	SLA target duration within which the ticket must be resolved.
Time to Resolve	Duration	Actual time taken to resolve the ticket.
Closed On	Date & Time	Date and time when the ticket was closed.
Customer ID	String	System-generated unique identifier of the customer associated with the ticket.
Customer Name	String	Name of the customer if registered in the Ameyo system.
Reopen Count	Number	Number of times the ticket was reopened after closure.
Customer Email	String	Registered email address of the customer.
Customer Phone	Number	Registered phone number of the customer.

Understanding Key Metrics

Metric	Purpose / Insight
Time to Assign	Measures the responsiveness of the ticket assignment process.
Time to Response	Evaluates how quickly agents provide the first response to customers.
Time to Resolve	Reflects efficiency in closing tickets and meeting resolution SLAs.
Reopen Count	Helps identify recurring or unresolved issues that require follow-up.
Status & SLA Fields	Allow supervisors to monitor open tickets, SLA adherence, and potential breaches.

Custom Fields Handling

The **Interaction Details Report** dynamically includes or excludes **custom fields** based on the campaign configuration at the time of report generation.

- If custom fields exist and are assigned to the campaign, their data appears in separate columns.
- If a custom field is **deleted or unassigned** later, it will **not appear** in future reports – even when fetching past data.
- However, the **historical data remains securely stored** in the database for audit and retrieval purposes.

```
This ensures that reports always reflect the current configuration of the interaction campaign while preserving the underlying data integrity.
```

Example

Ticket ID	Subject	Agent	Status	Priority	Created On	Closed On	Time to Resolve	Customer Name	Channel
45231	Payment Issue	Ravi Kumar	Closed	High	2025-07-10 10:05	2025-07-10 14:40	4h 35m	Anjali Sharma	Email
45242	App Login Error	Priya Verma	Resolved	Medium	2025-07-10 11:20	2025-07-11 09:15	21h 55m	Karan Bansal	Chat
45258	Refund Request	System Assigned	Pending	Low	2025-07-11 13:30	–	–	Nidhi Patel	Web

Use Cases

- **Supervisors:** Track ticket flow, SLA breaches, and agent performance.
- **Operations Teams:** Analyze interaction trends by channel or campaign.
- **Quality Analysts:** Review reopened or delayed tickets for process improvement.
- **Administrators:** Audit system-based vs. manual ticket creation and handling times.

Best Practices

- Regularly monitor **SLA durations** (Assign, Response, Resolve) to ensure compliance.
- Use **Reopen Count** and **Customer Comments** to identify process gaps.
- Filter by **Campaign**, **Queue**, or **Agent** for more focused operational insights.
- Combine this report with the **Feedback Report** to correlate SLA adherence with **CSAT performance**.
- Archive or export reports periodically for performance tracking and compliance audits.

16.1.4.1.4. Interaction Service Level Report

Overview

The **Interaction Service Level Report** provides a comprehensive overview of **SLA performance metrics** for all interactions handled across different **campaigns** and **queues**.

It highlights both **achieved** and **breached SLAs**, offering a 360° view of service responsiveness and operational efficiency within the contact center.

This report is essential for tracking adherence to predefined **Assign Time**, **First Response**, and **Resolution Time SLAs** – helping leaders identify performance trends, delays, and areas for improvement.

Purpose

Supervisors, managers, and administrators use this report to:

- Measure **service delivery performance** across queues and campaigns.
- Identify **SLA breaches** impacting customer experience.
- Evaluate the **efficiency of ticket assignment, response, and resolution** workflows.
- Monitor **agent and team-level compliance** with service standards.

Report Fields

Column Name	Data Type	Definition
#	Number	Row number for each record in the report.
Date	Date	The date on which the interaction was created, updated, or resolved.
Campaign Name	String	The name of the campaign in which the interaction occurred.
Queue Name	String	The name of the queue associated with the interaction.

Assignment SLA Metrics

Metric	Data Type	Definition
Interactions Assigned within Assignment Time	Number	Number of interactions that were assigned to users within the **Assign Time SLA**.
Interactions Assigned after SLA Breach	Number	Number of interactions that were assigned **after** breaching the Assign Time SLA.
Average Assignment Time	Duration	The **average time** taken to assign interactions to users.
% Interactions Assigned within SLA	Percentage	Calculated as:
(Interactions assigned within SLA ÷ Total interactions) × 100 – represents overall assignment SLA compliance.		

First Response SLA Metrics

Metric	Data Type	Definition
Interactions Responded after SLA Breach	Number	Number of interactions where the **first response** was delivered **after** the SLA threshold was breached.
Average First Response Time	Duration	The **average duration** between ticket creation and the agent's first response.
% Interactions Responded within SLA	Percentage	Calculated as:
(Interactions responded within SLA ÷ Total interactions) × 100 – indicates timeliness of the first response to customers.		

Resolution SLA Metrics

Metric	Data Type	Definition
Interactions Resolved within Resolve Time	Number	Number of interactions resolved within the **Resolve Time SLA** limit.
Interactions Resolved after SLA Breach	Number	Number of interactions resolved **after** the Resolve Time SLA was breached.
Average Resolve Time	Duration	The **average time** taken to fully resolve interactions in the campaign.
% Interactions Resolved within SLA	Percentage	Calculated as:
(Interactions resolved within SLA ÷ Total interactions) × 100 – measures adherence to overall resolution timelines.		

Understanding Key SLA Metrics

Metric	Interpretation / Business Impact
Assign Time SLA	Indicates how quickly new tickets are routed and assigned to agents. Delays may point to workload imbalance or routing inefficiencies.
First Response SLA	Reflects responsiveness to customers' initial contact. SLA breaches here often correlate with lower **CSAT** (Customer Satisfaction) scores.
Resolve Time SLA	Measures how effectively issues are resolved within expected timelines. Breaches may indicate complexity or escalation delays.
Average SLA Durations	Useful for benchmarking and identifying trends over time or across campaigns.
SLA Compliance %	Helps managers track service consistency and identify queues or agents needing performance improvement.

Example

Date	Campaign Name	Queue Name	Interactions Assigned within SLA	% Assigned within SLA	Interactions Responded after Breach	% Responded within SLA	Interactions Resolved within SLA	% Resolved within SLA	Average Resolve Time
2025-07-12	Technical Support	L1 Queue	188	94%	15	92%	171	89%	3h 12m
2025-07-12	Billing Support	Payment Queue	143	91%	8	96%	130	87%	4h 35m
2025-07-12	Sales Inquiry	CRM Queue	112	97%	5	98%	105	95%	2h 50m

Use Cases

- **Supervisors:** Identify queues or campaigns frequently breaching SLAs.
- **Operations Managers:** Benchmark SLA compliance across time periods or campaigns.
- **Quality Teams:** Correlate SLA adherence with customer satisfaction data.
- **Administrators:** Audit system performance and routing configuration efficiency.

Best Practices

- Maintain SLA thresholds aligned with customer expectations and contract terms.
- Investigate patterns where **First Response** or **Resolve Time SLAs** are consistently breached.
- Use this report alongside the **Feedback Report** to analyze SLA impact on **CSAT** and **NPS**.
- Review **average SLA durations** weekly to identify workflow bottlenecks.

- Set up **automated alerts** for SLA breaches in critical queues.

16.1.4.1.5. Transition Daily Report

Overview

The **Transition Daily Report** provides a detailed summary of all **interaction state transitions** within a specific day, categorized by **campaign** and **queue**.

It tracks how interactions move between different states – such as *New*, *Open*, *Pending*, and *Closed* – giving supervisors complete visibility into the **workflow progress**, **ticket reassignments**, and **SLA-impacting transitions**.

This report helps contact center leaders understand:

- The **volume of interactions transitioning between states**.
- The **workflow health** of campaigns and queues.
- The **frequency of reopens, pending movements, or merges**, which indicate efficiency gaps or process bottlenecks.

Purpose

Use this report to:

- Monitor **daily ticket flow** and track **workflow transitions**.
- Identify **reopened** or **pending tickets** that affect SLA calculations.
- Detect **bottlenecks** caused by frequent state reversals or manual handling.
- Audit **ticket lifecycle consistency** and **SLA exclusions** for compliance.

Report Fields

Column Name	Data Type	Definition
Setup ID	String	*(Only for Central ART Setup)* Displays the Setup ID of the Ameyo Server managing the campaign.
Setup Name	String	*(Only for Central ART Setup)* Displays the unique name of the Ameyo Server used for the campaign.
#	Number	Sequential row number for each entry in the report.
Date	Date	The specific date when the interaction activity or transition occurred.
Campaign Name	String	The name of the campaign in which the interaction took place.
Queue Name	String	The name of the queue associated with the interaction.

Transition Metrics

Metric	Data Type	Definition
Interactions Handled	Number	Total number of interactions handled (including created, updated, and closed) on that date.
New Created	Number	Number of **new interactions created** during the selected day.
New to Open	Number	Number of newly created interactions that were moved to the **Open** state.
Open to Close	Number	Number of open interactions that were **successfully closed** during the day.
Close to Open	Number	Number of previously closed interactions that were **reopened**, typically indicating follow-ups or unresolved issues.
Open to Pending	Number	Number of open interactions moved to the **Pending** state – indicating temporary holds or awaiting external input. *SLA timers are paused* for interactions in this state.
Pending to Open	Number	Number of previously pending interactions that were **reopened** and are now actively counted for SLA calculations.
Pending to Close	Number	Number of pending interactions that were **closed** after review or resolution.
New to Pending	Number	Number of new interactions that were directly moved to the **Pending** state without being opened. *SLA timers are paused for these interactions.*
New to Close	Number	Number of new interactions **closed directly** without being opened, typically indicating automated resolution or duplicates.
Merged	Number	Number of interactions that were **merged** into other tickets (e.g., duplicates combined).
Splitted	Number	Number of **merged interactions** that were **split back** into separate tickets.

Metric	Data Type	Definition
Expired	Number	Number of interactions that **expired** – where the creation date exceeded the configured expiry time while in a *Closed* state. • **Default expiry time:** 366 days • **Recommended minimum:** 90 days.

Understanding Key Transition Metrics

Transition Type	Meaning / Business Insight
New → Open	Indicates active ticket creation and handling initiation. A high ratio shows effective agent responsiveness.
Open → Pending	Reflects workflow pauses. High counts may signal dependency delays or missing inputs.
Close → Open	Represents reopened tickets – a key metric for **ticket quality** and **first-resolution effectiveness**.
Pending → Open	Tracks resumption of delayed work – useful for evaluating backlog recovery.
Merged / Splitted	Tracks data hygiene – merging helps avoid duplicates, while frequent splits may indicate improper merging rules.
Expired	Shows tickets automatically marked as expired due to inactivity or SLA configuration.

Example Report Snapshot

Date	Campaign Name	Queue Name	New Created	Open → Close	Close → Open	Open → Pending	Pending → Open	Merged	Expired
2025-07-14	Technical Support	L1 Queue	145	128	12	25	18	4	2
2025-07-14	Billing Assistance	Payment Queue	98	90	5	16	8	2	1
2025-07-14	Sales Enquiry	CRM Queue	110	102	7	9	5	1	0

How to Use This Report

- **Supervisors:** Track ticket flow and manage workload across queues.
- **Operations Managers:** Identify queues with high reopen or pending rates for process optimization.
- **Quality Analysts:** Monitor reopened tickets and analyze customer dissatisfaction triggers.
- **Administrators:** Validate workflow automation and SLA timer accuracy.

Best Practices

- Review **Open → Pending** transitions daily to ensure valid business reasons for SLA suspension.
- Investigate **Close → Open** transitions to improve **first-time resolution (FTR)**.
- Regularly merge or archive **duplicate tickets** to maintain clean data and reduce redundant workload.
- Use this report along with the **Interaction Service Level Report** to understand how **state transitions affect SLA adherence**.

16.1.5. CRM

16.1.5.1. CRM Reports

Overview

The **CRM Reports** section in the **Ameyo Archiving and Reporting Tool (ART)** provides detailed insights into customer relationship activities – including all customer interactions, state transitions, and lead-level details.

These reports are designed to help contact centers and sales teams monitor **customer engagement**, **lead progress**, and **interaction outcomes** in real-time.

By analyzing CRM reports, managers can gain a clear view of customer journey trends, agent performance in lead handling, and campaign efficiency.

Available Reports

Report Name	Definition	Applicable For
CRM Details Report	This report provides a complete view of all interactions performed with customers and the outcomes of those interactions. It helps track the **state changes of each customer** within the CRM system, offering visibility into the customer lifecycle, engagement activities, and conversion status.	Applicable for all CRM-integrated inbound and outbound campaigns where customer state management is enabled.
CRM Lead Details Report	This report offers detailed information on each customer (lead) present in the CRM, including their **contact details**, **latest call history**, **handling agent**, and **engagement records**. It enables supervisors and campaign managers to analyze **lead quality**, **interaction touchpoints**, and **follow-up effectiveness** across agents and campaigns.	Applicable for outbound sales, support, and hybrid campaigns using CRM-integrated data flows.

Key Benefits

- Gain **360° visibility** into all CRM-based customer interactions.
- Track **lead progress and conversion journeys** effectively.
- Identify **top-performing agents** and areas for improvement.
- Maintain accurate and up-to-date **customer communication records**.
- Improve **sales forecasting** and **customer engagement efficiency** through data-driven insights.

16.1.5.1.1. CRM Lead Details Report

Overview

The **CRM Lead Details Report** provides a detailed record of every customer and lead stored in the Ameyo's CRM system.

It gives contact center leaders and supervisors a complete view of customer data, including **personal information**, **contact history**, **last interaction details**, **agent association**, and **disposition outcomes**.

This report is essential for tracking **customer engagement**, **lead status**, and **call handling history** across campaigns – helping to improve **sales effectiveness**, **customer retention**, and **data accuracy**.

Purpose

Use this report to:

- Analyze **customer-level interactions** and outcomes across campaigns.
- Track **lead uploads**, **attempt counts**, and **call histories**.
- Identify customers with scheduled callbacks or DNC status.
- Maintain up-to-date records of customer demographics and communication details.
- Support compliance audits and CRM data quality monitoring.

Report Fields

Column Name	Data Type	Definition
#	Number	Sequential row number for each record.
Customer ID	String	Unique identifier of the customer associated with the call.
Lead ID	String	Unique identifier of the lead through which the call was made.
Lead Name	String	The name of the lead linked to the call.
Campaign ID	String	The ID of the campaign in which the call was connected.
Upload Date	Date	Date on which the lead was uploaded into the CRM.
Time Zone	String	Time zone specified for the lead.

Contact Information

Field	Data Type	Definition
Phone 1 / 2 / 3	Number	Primary, secondary, and tertiary phone numbers associated with the customer.
Email ID	String	Customer's registered email address.
Alternate Number	Number	Additional contact number for the customer.
Mobile Number	Number	Customer's mobile or cell number.
Fax Number	String	Fax number, if provided.
Home Phone	Number	Customer's home contact number.
Office Phone	Number	Customer's office or business contact number.

Call History and Disposition

Field	Data Type	Definition
Status	String	Current status of the call or lead.
Attempts	Number	Number of call attempts made for this lead.
Last Churn Date	Date	The date when this number was last marked as churned.
Churn Count	Number	Number of churn events recorded for this customer.
Is DNC	String	Indicates whether the number is listed as “Do Not Call” (Yes/No).
Is Excluded Disposed	String	Displays “Yes” if the call was disposed as “Excluded,” else “No.”
Excluded Disposition Date	Date	The date when the lead was disposed as “Excluded.”
Is Callback Scheduled	String	Displays “Yes” if a callback is scheduled for this number.
Last Call ID	String	The unique identifier of the last call made to this customer.
Last Call Time	Time	Timestamp of the last call made.
Last Phone	Number	The last phone number used to connect with the customer.
Last Call System Disposition	String	System disposition assigned to the last call.
Association Type	String	Type of association made on the call (e.g., Agent, Queue, or Campaign).
User ID	String	The unique ID of the user who handled the last call.
Username	String	The name of the user who handled the last call.
Disposition Class	String	The class of the disposition code used to close the last call.

Field	Data Type	Definition
Disposition Code	String	The specific disposition code under which the last call was closed.
User Talk Time	Duration	Total duration of the user's conversation with the customer (excluding hold time).
Wrap Time	Duration	Time taken by the user to complete post-call actions and disposition the call.

System Identifiers and Session Details

Field	Data Type	Definition
crt_object_id	String	Call Runtime Object ID – a unique identifier assigned to each call leg created in Ameyo.
session_id	String	Unique session token assigned for each agent login session. Used to authenticate transactions.
queue_id	String	ID of the queue in which the call was received.
queue_name	String	Name of the queue in which the call was received.
updatedon	Date	Date when this CRM record was last updated.
feedback	String	Feedback or remarks received from the customer for this call.
isnewnumber	String	Indicates if the phone number used in this call is newly added to the CRM (Yes/No).

Customer Personal Information (Dynamic Fields of Ameyo's CRM)

Field	Data Type	Definition
Title	String	Customer’s title (e.g., Mr., Ms., Dr.).
First Name (fname)	String	Customer’s first name.
Middle Name (mname)	String	Customer’s middle name, if available.
Last Name (lname)	String	Customer’s last name.
Designation	String	Customer’s job title or professional designation.
Date of Birth (dob)	String	Customer’s date of birth.
Marital Status	String	Customer’s marital status.
Gender (sex)	String	Gender of the customer.

Address Details(Dynamic Fields of Ameyo's CRM)

Field	Data Type	Definition
House No.	String	Customer’s house or apartment number.
Street No.	String	Street number in the customer’s address.
Landmark	String	Nearby landmark or location identifier.
City	String	City in the customer’s address.
State	String	State or province in the customer’s address.
Zip Code	String	Postal or ZIP code of the customer’s location.
Country	String	Country of the customer’s residence.
County	String	County or district name, if applicable.

Banking and Financial Information(Dynamic Fields of Ameyo's CRM)

(If captured)

Field	Data Type	Definition
Bank Name	String	Name of the customer's bank.
Account Number (accno)	String	Bank account number of the customer.
Account Holder Name (bankaccname)	String	Name of the person associated with the bank account.
Sort Code	String	Bank sort code (may be blank in regions where not applicable).
Social Security Number (ssno)	String	Customer's SSN, if collected.

Additional Details(Dynamic Fields of Ameyo's CRM)

Field	Data Type	Definition
Company Name	String	Name of the customer's company or organization.
Occupation	String	Customer's occupation or professional category.
BTN Number	String	Business Telephone Number, if available.
Comments	String	Notes or remarks associated with this lead or customer.

Use Cases

- **Supervisors:** Review customer data and recent interaction outcomes.
- **Sales Teams:** Track last contact attempts and schedule follow-ups.
- **Operations Managers:** Audit call history, DNC compliance, and callback records.
- **Quality Analysts:** Analyze lead churn and resolution trends.
- **CRM Admins:** Ensure data integrity and synchronization across systems.

Best Practices

- Update lead and customer records regularly to maintain CRM accuracy.
- Monitor **Is DNC** and **Is Callback Scheduled** fields for compliance and proactive follow-ups.

- Use **Churn Count** and **Last Call Disposition** to identify re-engagement opportunities.
- Validate financial and personal data fields under data protection guidelines (GDPR, PDPA, etc.).

16.1.5.1.2. CRM Details Report

Overview

The **CRM Details Report** provides a comprehensive record of all customer interactions and their outcomes across campaigns.

Each entry represents a single call event, showing **who contacted the customer**, **the call type**, **its outcome (disposition)**, and **associated customer and lead details**.

This report helps contact centers track **customer state changes**, **interaction histories**, and **agent performance**, offering complete visibility into every engagement recorded in the CRM system.

Purpose

Use this report to:

- Monitor all **customer interactions** and their results across campaigns.
- Track **agent activity**, **call attempts**, and **disposition outcomes**.
- Identify **customer engagement trends** and **churn patterns**.
- Audit **CRM data accuracy** and maintain clean, traceable call histories.

Report Fields

Column Name	Data Type	Definition
Setup ID	String	*(Only for Central ART Setup)* Displays the Setup ID of the Ameyo Server used for calling.
Setup Name	String	*(Only for Central ART Setup)* Displays the unique name of the Ameyo Server handling the campaign.
#	Number	Sequential row number for each entry in the report.
Call ID	String	Unique identifier for each call. Every call in the system is assigned a distinct Call ID.
Campaign Name	String	Name of the campaign in which the call occurred.
Date	Date & Time	Timestamp indicating when the call was made.
Lead ID	String	Unique ID of the lead from which the call originated.
Customer ID	String	Unique ID of the customer who participated in the call.
Phone	Number	Customer's phone number used for this specific call.

Call Type and Disposition

Column Name	Data Type	Definition
Call Type	String	Specifies the type of call. Possible values include: - inbound.call.dial: Inbound campaign call. - outbound.auto.dial: Auto-dialed outbound call. - outbound.callback.dial: Outbound callback call. - outbound.auto.preview.dial: Outbound preview dial call. - transferred.to.campaign.dial: Transferred call to another campaign. - outbound.manual.dial: Manually dialed outbound call. - click.to.call.dial: Click-to-call generated call.
System Disposition	String	System-defined disposition assigned to the call upon completion.
Disposition Code	String	Specific code chosen by the user to classify the call's outcome.
Disposition Class	String	Category grouping for the selected disposition code (e.g., *Sale*, *Follow-up*, *No Answer*).
Disposition Attribute	String	Detailed attribute or additional tag associated with the call's final disposition.
Verifier	String	Name of the user who verified or approved the customer record or disposition.

Column Name	Data Type	Definition
Name		

Call Performance and Metrics

Column Name	Data Type	Definition
Number of Attempts	Number	Total number of attempts made to connect this customer.
Talk Time	Duration	Duration of the conversation between the agent and the customer, excluding hold time.
Wrap Time	Duration	Time spent by the agent completing post-call actions or dispositioning the call.
Feedback	String	Feedback received from the customer regarding this call.
Is New Number	String	Indicates whether the customer's phone number used in this call was newly added to the CRM (Yes/No).
Updated On	Date	Date and time when the record was last updated.

Agent and Association Information

Column Name	Data Type	Definition
User ID	String	Unique ID of the user (agent) who handled the call.
Username	String	Name of the agent associated with the call.
Association Type	String	Defines the association type of the call (e.g., Agent, Campaign, Queue).
crt_object_id	String	Call Runtime Object ID – unique identifier for the customer's call leg. Created by Ameyo at call initiation.
usercrtobjectid	String	User Call Runtime Object ID – unique identifier for the user's call leg in Ameyo.
session_id	String	Unique session token generated per agent login session to authorize activities.

Queue and Campaign Details

Column Name	Data Type	Definition
Queue ID	String	ID of the queue where the call was handled.
Queue Name	String	Name of the queue associated with this call.
Call Date	Date	Date when the call was made (may differ from upload or update time).
Campaign ID	String	Unique campaign identifier under which the call was processed.

Customer Contact Details (Dynamic Fields of Ameyo's CRM)

Column Name	Data Type	Definition
Phone 1 / 2 / 3	Number	Primary, secondary, and tertiary phone numbers associated with the customer.
Phone Original	Number	Original phone number used to initiate the call.
Alternate Number (altno)	Number	Alternate contact number provided by the customer.
Mobile Number (mobileno)	Number	Mobile or cell number of the customer.
Fax Number (faxno)	Number	Fax number of the customer, if applicable.
Home Phone	Number	Home phone number of the customer.
Office Phone	Number	Office phone number of the customer.
Email ID	String	Customer's registered email address.

Customer Personal Information(Dynamic Fields of Ameyo's CRM)

Column Name	Data Type	Definition
Title	String	Customer's title (Mr., Ms., Dr., etc.).
First Name (fname)	String	Customer's first name.
Middle Name (mname)	String	Customer's middle name, if available.
Last Name (lname)	String	Customer's last name.
Designation	String	Customer's professional designation or job title.
Occupation	String	Occupation or business type of the customer.
Date of Birth (dob)	Date	Customer's date of birth.
Marital Status	String	Customer's marital status.
Gender (sex)	String	Customer's gender.

Address and Location Details(Dynamic Fields of Ameyo's CRM)

Column Name	Data Type	Definition
House No.	String	Customer’s house or apartment number.
Street No.	String	Street or building number in the customer’s address.
Landmark	String	Notable landmark or nearby location.
City	String	City where the customer resides.
State	String	State or province of residence.
Zip	String	Postal or ZIP code of the address.
Country	String	Country of residence.
County	String	County or district name, if applicable.

Banking and Identification Details(Dynamic Fields of Ameyo's CRM)

Column Name	Data Type	Definition
Bank Name	String	Name of the customer’s bank.
Account Number (accno)	String	Bank account number of the customer.
Account Holder Name (bankaccname)	String	Name of the person holding the bank account.
Sort Code	String	Bank sort code (may be blank in regions where not applicable).
Social Security Number (ssno)	String	Customer’s social security number (if applicable).

Company and Miscellaneous Information(Dynamic Fields of Ameyo's CRM)

Column Name	Data Type	Definition
Company Name	String	Name of the company where the customer works.
Business Telephone (btnumber)	Number	Business or corporate contact number.
Comments	String	Comments or notes made by the customer during the call.
Feedback	String	Any feedback provided by the customer post-call.

Usage & Insights

- **Supervisors:** Track all customer touchpoints and verify lead handling.
- **Sales Managers:** Measure agent productivity and follow-up success.
- **QA Teams:** Review call outcomes and customer data consistency.
- **Administrators:** Audit system usage, session integrity, and campaign performance.

Best Practices

- Regularly verify and clean CRM data to avoid duplicate or outdated entries.
- Use **System Disposition** and **Disposition Class** for performance analytics and quality reviews.
- Ensure compliance with data protection regulations when storing personal or banking details.
- Use this report in conjunction with **CRM Lead Details Report** for a holistic customer engagement view.

16.1.6. Group Manager

16.1.6.1. Group Manager Reports

16.1.6.1.1. Group Manager Session Details

16.1.6.1.2. Group Manager Productivity Summary Report

16.1.6.1.3. Group Manager Productivity Interval Summary Report

16.1.7. Contact Center Reports Glossary

16.2. Archival Solutions

16.2.1. Voice Logger and Archival (VLA)

16.2.2. Reports Archiver

16.2.3. Interaction Archiver

17. Fair Usage Policy Details

17.1. Omni CC FUP| Chat and Ticketing | M1

Overview

This document comprises FUP(Fair Usage Policy) numbers of chat and ticketing (4.13x release). Maintaining these numbers in the product will result in more reliable experience. Customer and support team needs to ensure that all parameters are within defined limits. If these numbers are breached, product may experience lag in various operations.

Category	Parameter	FUP	Units
Users	Maximum Number of users in a queue	200	Count
Users	Maximum number of users that can be created	650	Count
Tickets	Number of Tickets in New / Open / Pending state across all Campaigns	2	Lakh
Tickets	Number of tickets in Closed / Lite state across all Campaigns	5.6	Lakh
Tickets	Average Number of Messages in a Ticket	8	Count
Tickets	Maximum number of tickets created in a min	32	Count
Tickets	Average number of tickets created in a min	6	Count
Tickets	Total number of tickets in a Contact Center	7.6	Lakh
Tickets	Max size of message in a ticket	300	KB
Tickets	Average size of message in a ticket	32	KB
Tickets	Average size of Attachment in a message	400	KB
Tickets	Maximum size of attachment of a message	5	MB
Tickets	Number of total messages across all tickets in a Contact Center	0.61	Crore
Tickets	Average Number of open and pending tickets per user	300	Count
Tickets	Average Number of Closed tickets per user	850	Count
Tickets	Ticket search requests per min by all users	1800	Count
Tickets	Total Merge ticket operations per min	3	Count
Tickets	Updating custom fields operation per min	100	Count
Tickets	Ticket Assign and reassign req per min	20	Count

Category	Parameter	FUP	Units
Tickets	Ticket un-assign req per min	20	Count
Tickets	Get ticket requests per min	2700	Count
Tickets	Max ticket external state that can be created	12	Count
Chat	Maximum Agents assigned in chat campaign	200	Count
Chat	Max Concurrent live chats connected to all agents	320	Count
Chat	Maximum size of all text messages exchanged in a chat	2	KB
Chat	Maximum size of an attachment sent in a chat Session/Interaction either via consumer or agent	5	MB
Chat	Max Total size of attachments sent in a chat Session/Interaction	20	MB
Chat	Maximum chat transfer requests to an agent in an hour	20	Count
Chat	Maximum chat transfer requests to a queue in an hour	8	Count
Chat	Maximum chats queued in a queue concurrently	20	Count
Chat	Max concurrent Chat transfers from bot to an agent at any point of time	20	Count
Chat	max chats transferred from Bot to Agent in an hour	240	Count
Chat	Maximum customer addition requests received in an hour	240	Count
Campaign	Number of Interaction campaign (per process)	1	Count
Customers	Total number of customers created in a Contact Center	24	Lakhs
Rule Engine	Maximum time that can be configured per SLA	75	Days
Rule Engine	Maximum number of event rules	40	Count

Category	Parameter	FUP	Units
Rule Engine	Maximum number of timer rules	8	Count
Rule Engine	Maximum number of routing rules	8	Count

18. Business Continuity plans

18.1. Understanding Business Continuity Plan (BCP)

Overview

A Business Continuity Plan (BCP) is a strategic framework that helps organizations prepare for, respond to, and recover from unexpected disruptions. Its core purpose is to ensure that critical business functions can continue with minimal interruption, protecting both the organization and its customers.

Why Is a Business Continuity Plan Essential?

In today's highly competitive market, customers are increasingly informed and empowered. They expect seamless, reliable service and have numerous alternatives if their expectations are not met. Interruptions or failures can quickly lead to lost trust and business.

A solid BCP helps maintain uninterrupted customer service, which is vital for retaining existing customers and attracting new ones. It minimizes operational downtime, reduces financial and reputational risks, and ensures compliance with regulatory requirements.

What Does a Business Continuity Plan Include?

A well-prepared BCP typically contains:

- Clear objectives and scope, defining which business areas and operations are covered.
- A thorough risk assessment and business impact analysis to identify critical processes and potential threats.
- Practical recovery strategies and procedures focusing on swift service restoration.
- Established communication protocols to keep employees, customers, and stakeholders informed.
- Regular training, testing, and updates to keep the plan current and effective.

The Importance of Business Continuity Today

In today's dynamic environment, customers have more choices than ever. If a provider falls short or cannot deliver consistent service, customers can quickly move to competitors. Exceptional customer service is key not only to maintaining loyalty but also to building new business.

Ensuring your services are reliable and always available is therefore a strategic priority. Business continuity is not just about technology—it's about preserving trust and supporting your customers consistently.

Two Common Business Continuity Approaches

Business Continuity is the overarching strategy that allows an organization to continue working even in the event of a fault or disaster. A robust Business Continuity plan is achieved by implementing two key methodologies: **High Availability (HA)** and **Disaster Recovery (DR)**.

Together, these strategies help contact center organizations run their operations 24/7, 365 days a year, with minimal hindrance.

1. High Availability

High Availability focuses on designing systems and infrastructure to prevent failures and ensure continuous operation. It aims to keep services up and running with minimal downtime

How it works:

- HA systems incorporate redundancy—multiple servers, network paths, or power supplies—so that if one component fails, another can immediately take over without service interruption.
- Includes technologies and setups such as automatic failover, manual failover, and load-sharing to prevent service interruptions.
- Technologies include load balancers, clustering, automatic failover mechanisms, and multi-path networking.
- The primary goal is to eliminate single points of failure within the infrastructure, allowing for quick, often milliseconds or seconds, automatic recovery in case of hardware or software faults.

Examples:

- Redundant server clusters in data centers.
- Load-balanced web applications with instant failover between servers.
- RAID configurations for storage to prevent data loss.

Targeted Objectives:

- Achieve maximum system uptime
- Minimize or eliminate service interruptions during routine failures or maintenance
- Maintain a steady quality of user experience

2. Disaster Recovery

Disaster Recovery is a comprehensive, strategic process of restoring full operations after a severe disruption or catastrophic event. It ensures that critical data, applications, and infrastructure can be recovered within defined timeframes after an outage.

How it works:

- DR involves creating backup copies of data and systems—whether onsite, offsite, or cloud-based—and establishing procedures for restoring these assets in a planned,

structured manner.

- It typically includes data backups, geographic redundancy, and recovery sites (hot, warm, or cold sites).
- The focus is on resilience and recovery speed, often measured by Recovery Time Objective (RTO) and Recovery Point Objective (RPO).

Examples:

- Restoring data from backups after a cyberattack or physical disaster.
- Switching operations from a primary data center to a secondary one in another location.
- Full system rebuilds following a natural disaster.

Targeted Objectives:

- Minimize operational downtime after disasters
- Protect data integrity and availability
- Enable rapid recovery to ensure business continuity despite severe events

Key Differences Between HA and DR

Aspect	High Availability (HA)	Disaster Recovery (DR)
Purpose	Prevent failures and minimize downtime during normal operations	Recover full operations after major disruptions or disasters
Focus	System design, redundancy, fault tolerance	Data backup, restore procedures, geographic redundancy
Response Time	Seconds or milliseconds	Hours, days, or weeks depending on severity and plan
Scope	Continuous operation of services	Restoring entire systems or infrastructure after failure
Implementation	Single system with redundant components	Separate backup sites and recovery processes

How They Complement Each Other

While HA creates a resilient environment that minimizes the chance of failure, DR prepares you for worst-case scenarios where HA might fall short. Combining both strategies ensures **full-spectrum protection**—preventing outages and enabling swift recovery when failures happen.

18.2. High Availability & Disaster Recovery

Overview

This document explains Ameyo's High Availability (HA) and Disaster Recovery (DR) strategies for maintaining continuous system operations. It covers HA failover methods and DR processes that ensure minimal downtime and quick restoration during failures.

High Availability (HA)

High Availability refers to a system's ability to remain operational and available despite the failure of one or more of its components.

- **HA provides service redundancy**.
- It relies on redundant components and a "switchover" process (either automatic or manual) to a standby component upon failure.

High Availability for Software

High availability software refers to the use of software to ensure that systems are running (available) most of the time. High availability is a characteristic of a system and is defined as the percentage of time that the system is functioning.

HA cluster

A high availability cluster is a group of hosts that act like a single system and provide continuous uptime. High availability clusters are often used for load balancing, backup and failover purposes.

Clustering

Clustering is the most common technique to achieve High availability for any services by introducing redundancy in software, hardware and data. In a failure the clustering software immediately start the application on the standby system without requiring administrative intervention.

Depending on the type of redundancy in software to be provided for High Availability, clusters can be configured in any of the following configurations:

1. Automatic Failover (Hot Failover)

This method, also known as **Hot Failover**, is designed for minimal-to-zero disruption as it does **not require manual intervention**. The transition to the redundant component is transparent, allowing users to continue work without interruption.

Ameyo's Hot Failover solution promises an impressive uptime of 99.95%.

Example: Application Server Failure In a Hot Failover setup, agents are connected to the Ameyo Application via a virtual IP.

If the main Application Server goes down, the redundant server automatically takes over. The agent might experience a brief connection error (1-2 minutes maximum) before being automatically reconnected. Critically, **existing calls continue without any manual intervention**.

In Ameyo, there are three ways of implementing Hot Failover depending on the setup size and requirement of Organization.

- **1+1 Redundancy**

1+1 redundancy can be provided in those cases where Organizations requires separate server for managing high availability for all services (APP + DATABASE + CALL) under the solution.

- **N+1 Redundancy**

N+1 redundancy can be available in those cases where Organizations is asking for a single server for managing redundancy for all services (APP + DATABASE + CALL) running on different servers.

- **N+N Redundancy**

As the name suggesting, N+N redundancy is something where multiple redundancy servers are involved for managing Ameyo services on multiple primary servers.

2. Manual Failover (Cold Failover)

This method, known as **Cold Failover**, involves replicating Ameyo services on a separate standby server. This maintains a copy of the services that can be used during a fault.

This approach is suitable for organizations with smaller contact centers that are not running mission-critical processes and can absorb a brief, planned downtime. Ameyo's Cold Failover solution promises 99.5% uptime.

Main server is active:

How it Works: Unlike Hot Failover, this process **requires manual intervention** from an IT team. When the main server fails, a technician must:

1. Disconnect the main server from the LAN.
2. Configure the standby server with the same IP address as the failed server.
3. Manually start all Ameyo services on the (now active) standby server.

Once these steps are complete, operations can resume.

Standby server is activated manually when Main server is down]

3. Load-Sharing (Active-Active)

Ameyo also implements an **Active-Active** methodology for call services, which acts as a form of load sharing.

In this configuration, call managers run on **both the main and redundant servers simultaneously**. Calls are distributed across both active call managers. SIP proxy services allow contact center users to register on both managers, ensuring high availability.

If one call manager fails, the calls on that specific server are disconnected. However, the secondary call manager is still functional and immediately begins handling the full load of all new calls.

Disaster Recovery (DR)

While HA handles *component* failure (like a single server), Disaster Recovery handles large-scale *disasters* (natural or man-made).

- **DR provides data recovery**.
- It is a formal, documented plan for restoring a system to an acceptable state *after* a disaster, such as the **loss of an entire building or data center**.

In a DR event, all call center operations are diverted to a separate, pre-determined **DR site**.

Ameyo's DR Methodology

The Ameyo suite provides a full-fledged DR solution using **real-time database replication**. The main (Central Location) and DR Location are kept continuously updated over a stable connection, such as MPLS.

Activating the DR Site (Standard Plan of Action)

When a disaster occurs and the main site goes down, the DR site can be made live with only a few operational and solution-level changes.

The high-level steps to activate the Ameyo Business Continuity Plan (BCP) are as follows:

Call Centre Movement: The organization moves call center staff to the DR site or another location where the Ameyo DR setup is accessible.

Access DR Site Setup: Using a CLI (Command Line Interface) Terminal, the IT team accesses the DR site configuration.

DB Mode Change: The DR site's database server, which is normally in READ mode, must be changed to **WRITE mode**.

Start Services: The required Ameyo licensing and application services are started in the correct order.

Agent Login: Agents are required to log in to the Ameyo application by changing the IP address in their web URL and within their softphone configuration.

19. User Guides

19.1. Administrator Guide

19.1.1. Administrator Login

Overview

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

Ameyo Administrator Login

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

Login Methods

You can log in using one of the following methods:

1. **Normal Login:** Enter your assigned **User ID** and **Password** and click **Login**.
2. **Login with SAML (Licensable):** Click **SAML** to log in using the Security Assertion Markup Language (SAML) framework. This method allows for secure single sign-on by exchanging authentication information with a third-party Identity Provider (IDP).

   > SAML authentication is supported on Ameyo public cloud with a limitation of 800-900 consecutive logins at a time. OAuth authentication on cloud can be used for 10,000 consecutive logins at a time.

- **Login with Google (Licensable):** Click **G- Google** to log in using your G Suite (Google Business) account.

Language Selection

Before logging in, you can select your preferred language from the drop-down menu at the top-right corner of the screen. By default, the language is set to English. Available languages include English, French, Thai, Arabic, Japanese, Turkish, and Deutsch.

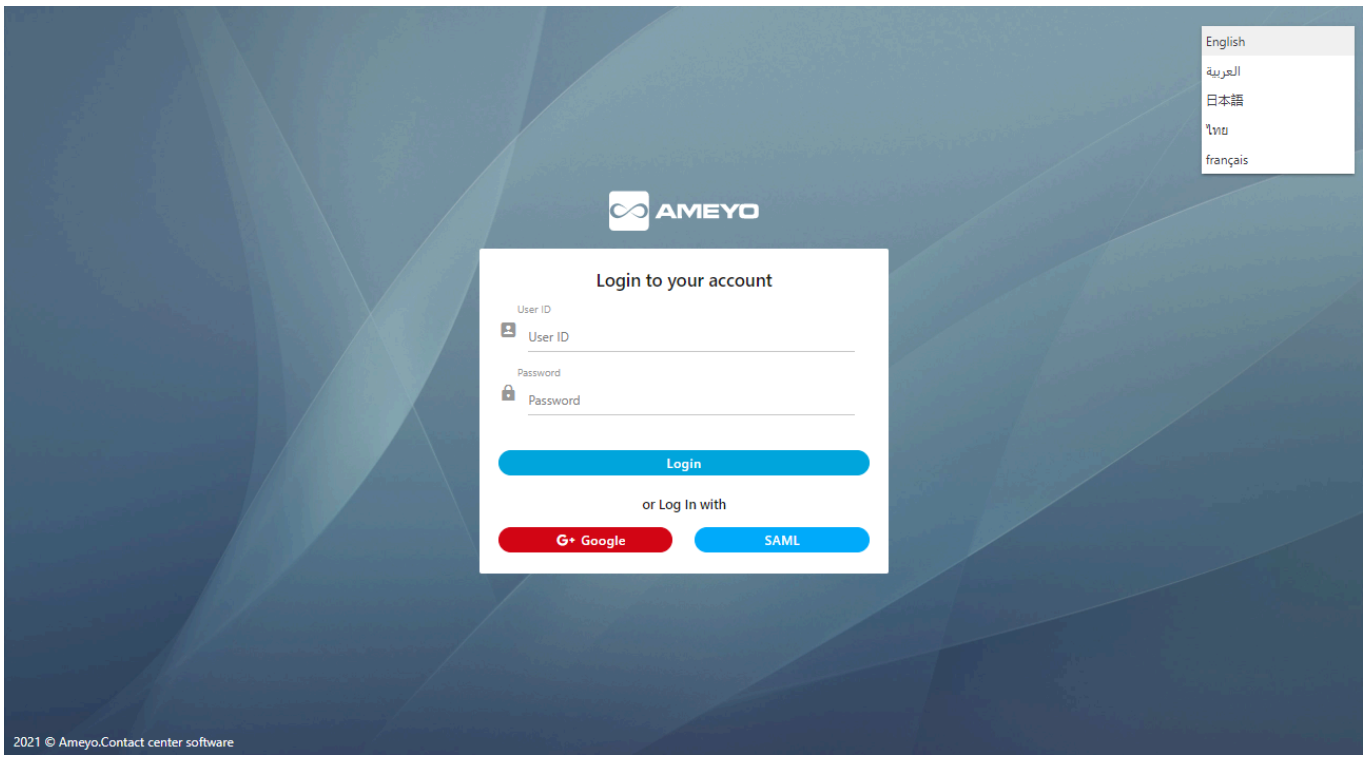


Figure: Change Language on Login Screen

After the Administrator logins successfully, **"System"** tab is displayed in the browser.

✅ Summary

Feature	Description
Normal Login	Log in using standard Ameyo credentials.
SAML Login	Enterprise SSO using Identity Provider (e.g., ADFS).
Google Login	SSO using a Google account.
Licensing	SAML and Google authentication must be licensed and configured.

19.1.2. Administrator Console

After successfully logging in, you will land on the main Administrator Console, also known as the Administrator Workbench. This is your central hub for managing all aspects of the contact center.

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

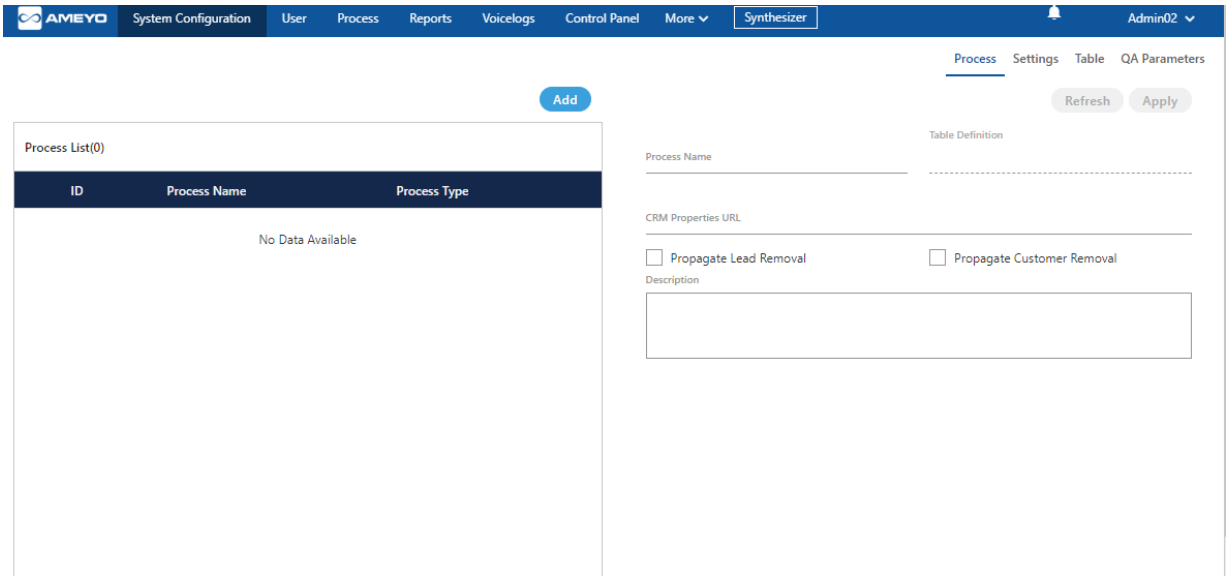


Figure: Ameyo Administrator Workbench

Navigation Bar

System Tab

The main navigation bar at the top provides access to all major modules:

- **System Tab**
  - **System Configuration:** Manages system-wide settings, processes, tables, and rules.
  - **App Manager:**
- **User:** Manages user accounts, roles, and groups.
- **Process:** Manages specific campaigns and their settings.
- **Reports:** Accesses historical data and performance reports.

- **Voicelogs:** Searches and listens to call recordings (managed via the Control Panel).
- **Control Panel:** Accesses advanced administrative tools for database management, backups, and more.
- **More:** Contains additional modules, such as the Call Manager.
- **Synthesizer:** (Functionality not detailed in this section).

> App Configuration (that is App Manager), Reports, and Call Manager has to be enabled in the backend to view and access these tabs. If not enabled, these tabs will not be visible. These tabs will be discussed in different documents.

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

Internal Chat

The users can chat internally with each other by using this feature. This feature can be enabled by the administrator.

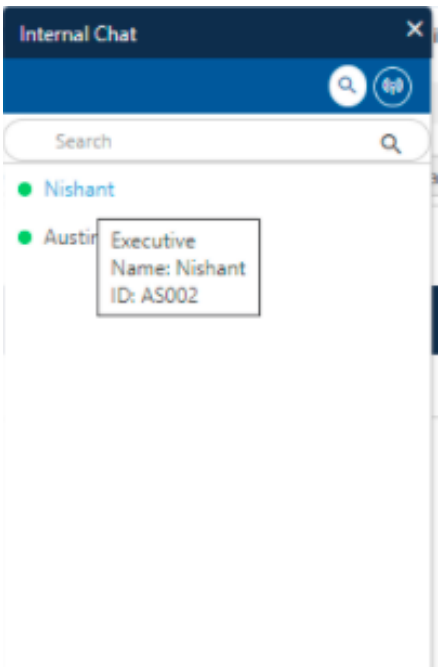
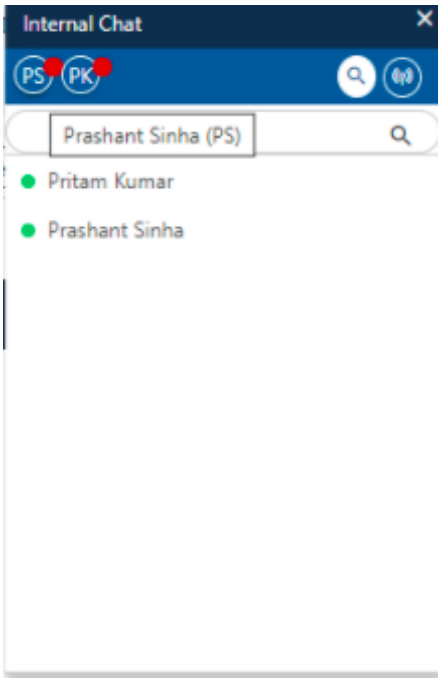
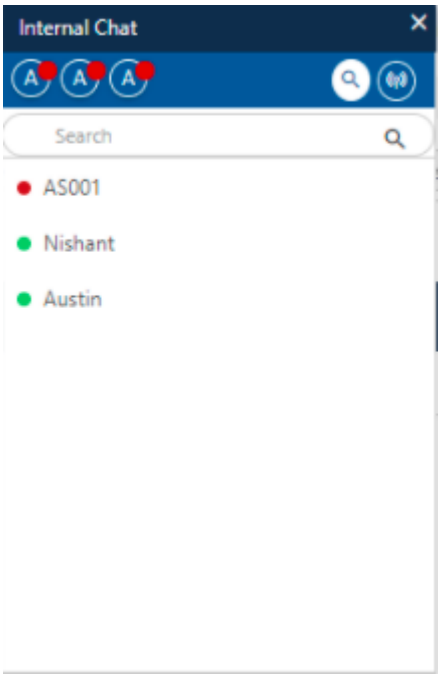


Figure: Internal Chat Window

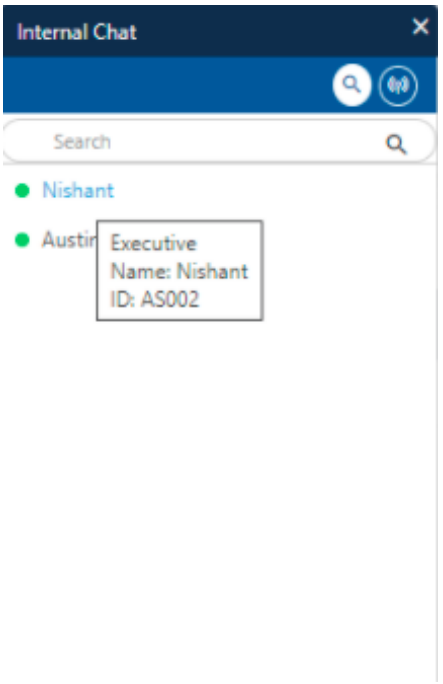
There are certain users that are displayed on the chat window header above the search bar. The user can click on the required user to initiate a chat. These user are displayed using their initials, for example, John Doe is displayed as JD. The user can hover over the initials to view that particular user's username and user ID.



The user can also search for a user using either their username or user ID.



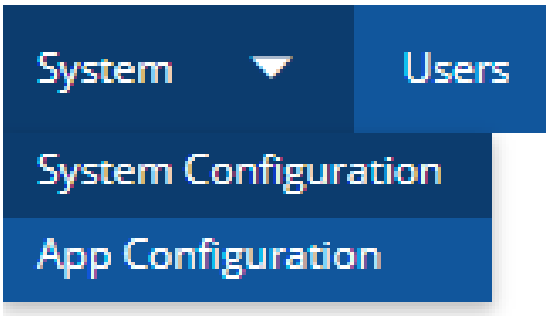
In the search list, the user can hover over a username to view it's username and user ID.


Internal Chat
Search
Nishant
Austin
Executive
Name: Nishant
ID: AS002

19.1.3. System Tab

Overview

The **System** tab is your primary configuration area. It contains options for setting up the foundational elements of your Ameyo instance



System Menu

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

- **System Configuration**

This is the most critical section for initial setup, divided into four main tabs: Process, Settings, Table, and QA Parameters

- **App Manager**

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

Please refer to "**App Configuration**" document to know more about the same

19.1.3.1. System Configuration

This is the most critical section for initial setup, divided into four main tabs: Process, Settings, Table, and QA Parameters. Administrator can configure system level settings through this tab.

- **Process**
- **Settings**
  - **Settings Tab**
  - Ticket Settings
  - Mapping Policies
- **Table**
  - Table Definition
  - Agent Table Definition
  - Mapping Policies
  - Filter
  - Filter Groups
- **QA Parameters**

CRM Configuration

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

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

System Settings After Creating Campaigns

Some System Settings are available only after creating the different types of campaigns. Refer to the following to know more.

- **System Settings after creating Campaign**

Auto relogin (`isAutoReloginEnabled`)

This article documents the **contact center** server preference `isAutoReloginEnabled`, which controls whether the **web client** uses an enhanced keep-alive and **automatic re-login** path after prolonged connectivity loss. It complements the agent-facing steps in **Login at Ameyo**.

> **Naming** – The preference key in the server preference store is `isAutoReloginEnabled`. The product UI may label this concept as “auto re-login” or similar.

Purpose

When **enabled**, after the client detects sustained keep-alive / ping failures (or a keep-alive timeout), the application can navigate to an **auto re-login** flow. When connectivity returns, the client:

1. Verifies that the **same browser origin** is reachable (REST `/ameyorestapi/echo`).
2. For supported **agent-class** roles, **re-authenticates using credentials already held by the client** (force login), then **re-syncs** saved UI state (for example campaign, extension, agent status) so the user is **not** prompted to type user ID and password again on the login screen.

When **disabled**, the client uses the **standard** keep-alive timer only; recovery from outages is left to normal session behavior and manual login if the session is lost.

Configuration

Item	Detail
Preference key	`isAutoReloginEnabled`
Type	Boolean (store and interpret as string `true` / `false` where applicable).
Scope (code)	Read at **Contact Center** hierarchy via the server preference store (`CONTACT_CENTER` context and contact center id).
Who sets it	Typically an **Administrator** (or operations) using your deployment's **Server Preference Store** tooling for the target contact center.
After change	Follow your standard process for applying server preference updates (for example **Reload Server Preference Store** where required – see **System Settings Tab**).

Same origin – Recovery pings use the **current page host** (`Location`). The feature does **not** switch the browser to a different hostname (for example a manual "failover URL"). Designs that rely on DNS/VIP or reverse proxy so the **same URL** maps to a healthy node are compatible; designs that require the user to open a **different** host are not covered by this mechanism alone.

Related client behavior (reference)

The following are **implementation details** useful for support and advanced troubleshooting. They are **not** separate administrator preferences in the codebase reviewed for this page:

Behavior	Notes
Keep-alive interval	Fixed client interval (**20 seconds**) between keep-alive attempts when auto re-login mode is active.
Keep-alive timeout check	Separate **12 second** repeating check can treat a **stuck** keep-alive as overdue and trigger the auto re-login path.
Failures before auto re-login	Consecutive keep-alive failures beyond a **configurable** maximum (default **3**, meaning **more than three** failures) can trigger auto re-login; the maximum can be supplied per user via `getMaxPingFailureCountForUser` (server).
Echo poll (recovery)	After entering auto re-login, the client polls `/ameyorestapi/echo` about every **3 seconds** until HTTP **200** is received, then proceeds with re-login and state sync.

Fast failures (for example browser **Offline** in developer tools) may space attempts **20 seconds** apart; a short outage may therefore **recover without** entering the auto re-login screen if the next keep-alive succeeds before thresholds are met.

Roles and UX

Area	Behavior (summary)
Professional Agent, Executive	After server is up again: **state sync** path including **force login** with stored credentials; then return to the previous place where possible; optional WebRTC re-registration when applicable.
Supervisor, Analyst, Administrator, User Access Manager	After server is up: **save user data** event / local storage path rather than the full agent sync chain (see client `AutoReloginPresenter` implementation).

Exact role names in your deployment may follow your license and user-type configuration.

Product version notes

- Release notes have referred to `autoReloginPhoneAgent` and similar flags in patch history; align operational runbooks with the **actual** key in the preference store for your version (`isAutoReloginEnabled` for the path described here).
- Validate behavior on your **specific** release before enabling in production (see for example **Contact Center - Patch Release Notes 6_9_0** in this repository's Release Notes).

See also

- **Login at Ameyo** – end-user login steps and campaign selection.
- **System Settings Tab** – reloading server preference store after changes.
- **Generic Toolbar Integration** – CRM loginHandler behavior mentions **auto re-login** in integration contexts.

19.1.3.2. Process in System Configuration

Process in System Configuration

A **Process** is the main component under which campaigns, users, and other settings are organized. You must create a process first to set up a contact center

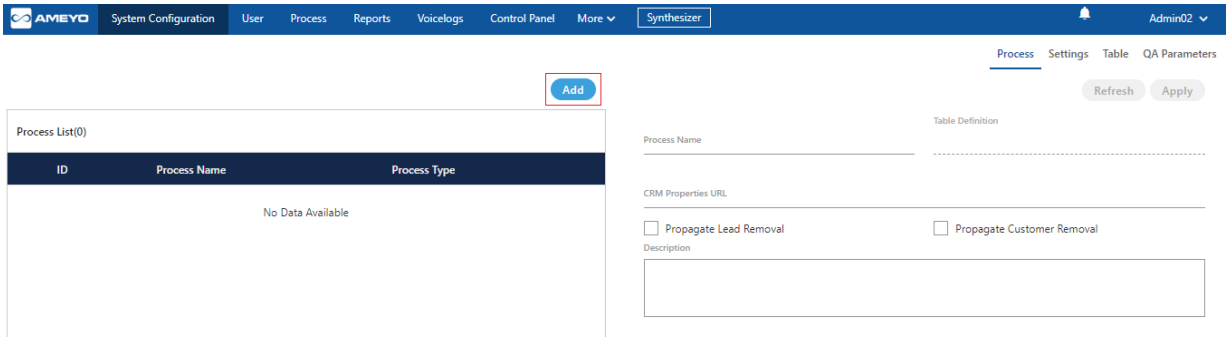


Figure: Process Tab

Create a Process:

1. Click the **Add** button.



Figure: Create Process

2. Enter a **Process Name**.
3. Provide a **Description**.
4. Select a **Process Type** (e.g., Default).
5. Choose a **Table Definition** (e.g., DefaultTableDefinition).



Figure: Creating a Process

6. Click **Done.** The process is created and displayed on the screen.

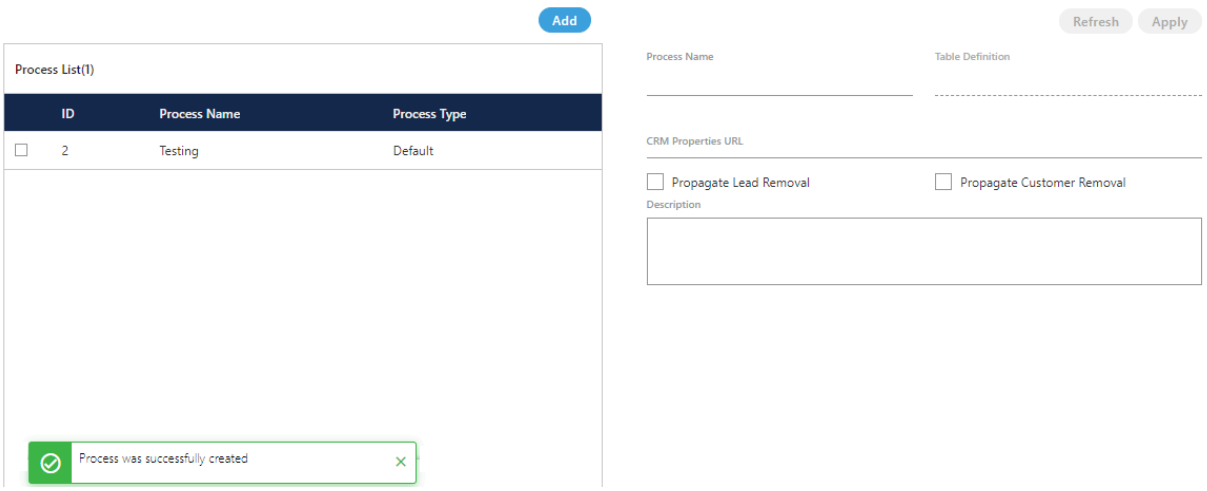


Figure: Created a Process

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

Modify a Process:

After selecting a process from the list, you can modify its settings

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

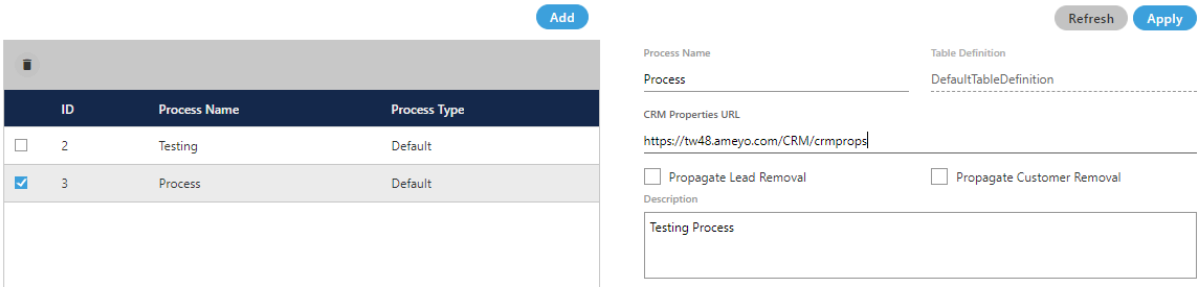


Figure: Modify a Process

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

    - [ ] For example, the following URL can be added for a local AppServer http://<IP_Address_Domain_AppServer>:8786/<CRM_Name>/crmprops Replace <IP_Address_Domain_AppServer> with the IP Address or the domain name of the URL where CRM is hosted.

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

2. **Propagate Lead Removal:** If checked, deleting a lead in Ameyo will also delete it from the CRM database.
3. **Propagate Customer Removal:** If checked, deleting a customer's number in Ameyo will also delete it from the CRM database.
4. Click **Apply** to save changes. Whereas, click "Refresh" button to discard the changes.

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

Delete a Process:

Administrator can delete any process by following below steps.

1. Select the process that needs to be deleted.

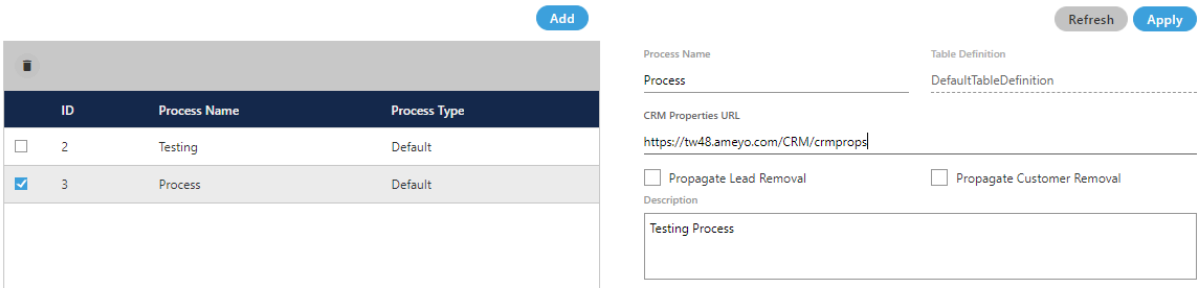


Figure: Delete Process

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



3. Click "Yes" to delete the process.

- Click "No" to not delete the process.
- When you click "Yes", the process will be deleted and removed from the list.

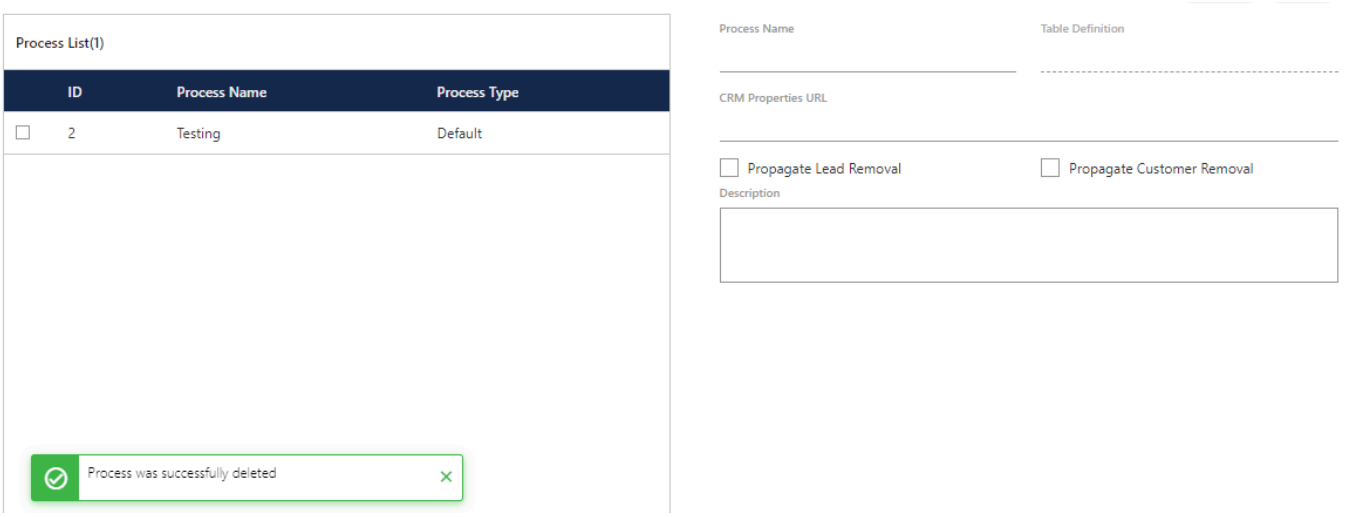


Figure: Deleted a Process

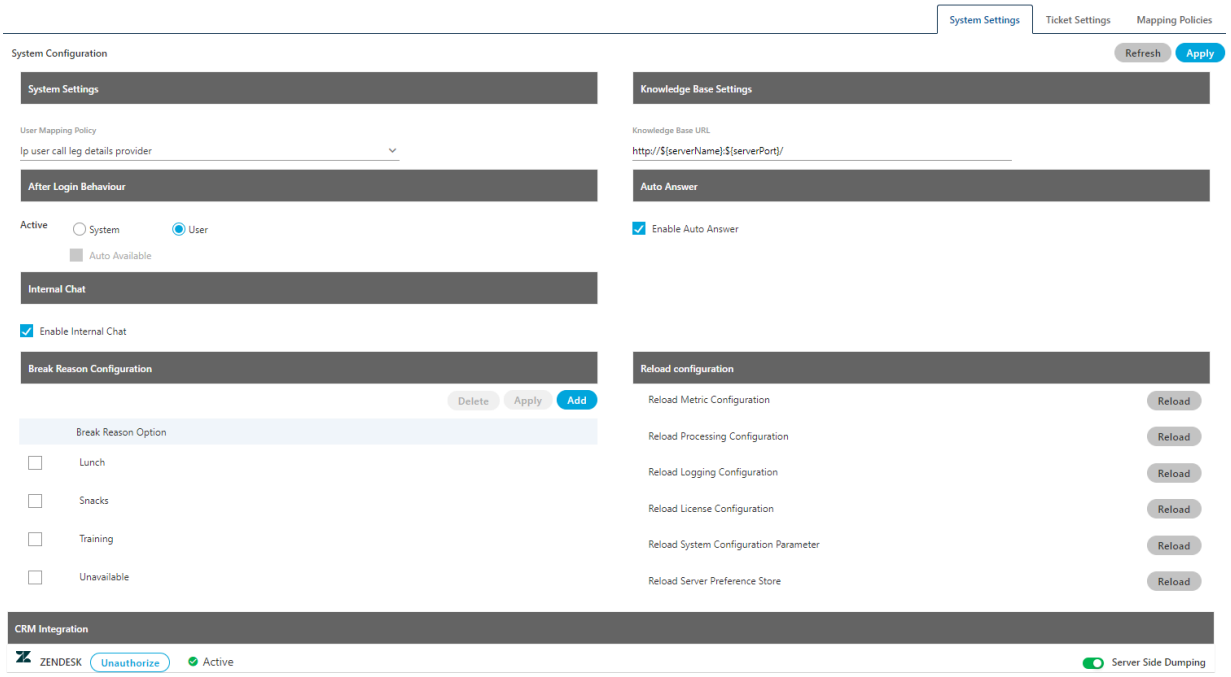
The ID of the deleted process cannot be reused. It will remain consumed even after deletion of the process.

19.1.3.3. Settings in System Configuration

Settings Tab in System Configuration

Through this tab, administrator can configure system settings, ticket settings, and mapping policies through below mentioned tabs.

- System Settings
- Ticket Settings
- Mapping Policies



19.1.3.3.1. System Settings Tab

This section defines global behaviors for your Ameyo system.

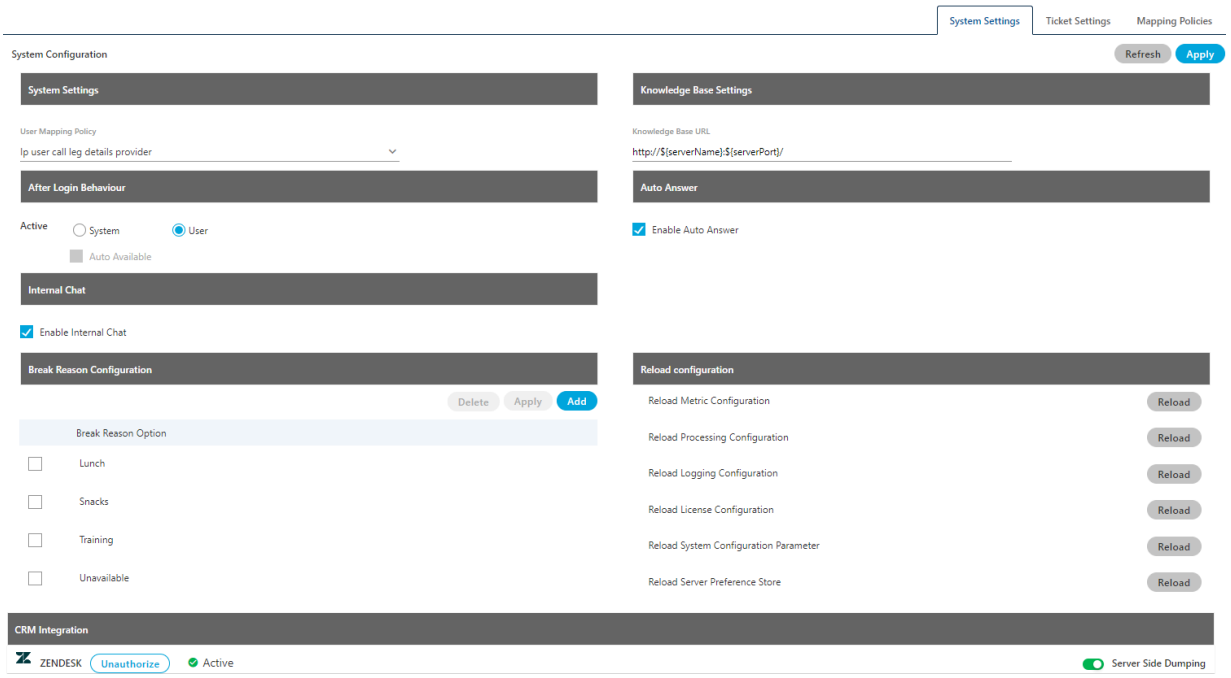


Figure: Settings Tab → System Settings

User Mapping Policy:

Maps a user's machine to their phone device. This is used to assign telephony channels.

> Make sure to enable the Call Manager at the backend and configure voice resource and call contexts in it before configuring User Mapping Policies.

A. The Administrator can select the phone mapper type values from the drop down to map the extensions with particular IP. This option can be used to avoid wrong selection of Telephony Channel by the user while logging into the system. The view of "Mapping Policy" tab will be changed for every user mapping policy selected here.

- **IP multiple user call leg details provider (Licensable):** This mapper can be used to map an IP with multiple call contexts. The applied settings will be applicable for the user who gets the option to select the call context while logging into system. This phone

mapper type will be enabled after procuring appropriate license component at the center.

- **Userid mapped Call leg Details provider (Licensable):** Select it define the default extensions for the selected users. The selected users will not be asked to select the extensions after selecting the campaigns at their logon. After selecting this option, you have to browse "Mapping Policy Tab" to select the default single or multiple extensions for the users.
- **User ID based call leg details provider (Licensable):** This mapper can be used if WebRTC is being used. This phone mapper type will be enabled after procuring appropriate license component at the center. After selecting this policy, the following option is displayed just below it.



Figure: Option to select Extension if WebRTC is not available

> You have to configure WebRTC also to use this mapping policy.
> **Reference Document:** https://sites.google.com/a/ameyo.com/engineering/media-pages/webrtc-knowledge-base/webphone---webrtc-softphone

Select this option to let the system select any Extension if WebRTC is not available.

- **Manual user call leg details provider (Licensable):** This mapper policy can be used when no mapping needs to be done.
- **IP user call leg details provider (Licensable):** Select it to map one IP with single extension. The Agent need not to select the extension as the IP is already mapped with an extension while logging into the system. The applied settings will be applicable for the user who gets the option to select the call context while logging into system.

> It is the default option.

2. **Knowledge Base Settings**: The Administrator can define the knowledge base page URL here. Supervisor, agents, and other users will view this page on the Home screen of their

workbenches.

Modify the value of "Knowledge Base URL" field. It's default value is given below.http://${serverName}:${serverPort}/

3. **After Login Behaviour :** Using this feature, the administrator can define the after login behaviour. It contains the following two options. Any one of them can be selected only.

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



Figure: System Auto-Available Option

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



Figure: User Available Option

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

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



Figure: Auto-Answer and Internal Chat options

5. **Internal Chat (Licensable):** Enables or disables the internal chat feature for all users.After enabling it, the Supervisor, Agents, and other users can use the internal chat to communicate with each other. A static chat icon will be displayed on the bottom right corner of the interface of every user.

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

6. **Break Reasons (Licensable):** Allows you to create and delete the break reasons (e.g., Lunch, Training) that agents can select. Created break reasons will be applied at system level and same will be visible to agents on Ameyo Web Access. While going on break, agents can select the respective break reason.

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

- To add: Click **Add**, enter a name, and click **Apply**.
- To delete: Click "**Yes**" to delete the selected break reason.



Figure: Asking to delete a Break Reason

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

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

Reload Configuration: These buttons force Ameyo to re-read its configuration files. This is often needed after making backend changes. After clicking a button to reload the selected configuration, you have to logout from Administrator Console and then login again to make it effective.

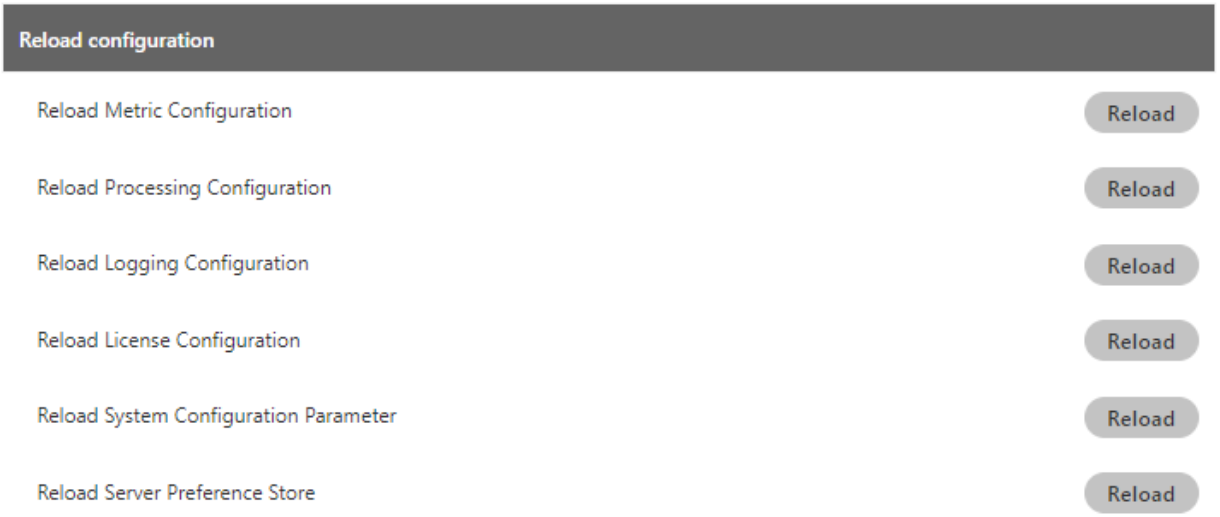


Figure: Reload Configuration Section

A. Reload Metric Configuration: Reloads metric settings.

B. Reload Processing Configuration: Reloads processing settings.

C. Reload Logging Configuration: Reloads logging settings.

D. Reload License Configuration: Reloads the license configurations.

E. Reload System Configuration Parameter: Reloads system configuration parameters. Reloading the "System Configuration parameter" also reload the "IC Configuration Parameter" with one click. This button also reloads the AutoClose and AutoExpire Timers with one click. There is no need to reload them separately.

Following parameters will be reloaded from here.

- isCustomerEditable
- shouldRunHeatValueTimer
- smsNotificationCredentials
- AutoClose Timer
- AutoExpire Timer

F. Reload Server Preference Store: Reloads server preference store

> After the changes in mapping policies, always reload the server preference store.
>
> If there is a change in licenses then reload both License configuration and server preference store.

8. **CRM Integration :** Here, the Administrator can enable the access to the Third-party Apps including CRMs such as Zoho, Zendesk, Salesforce, Microsoft Dynamics, Freshsales, and Freshdesk Mint. For some Apps like Zendesk CRM and Zoho Desk, the OAuth for Single Sign-On have to be enabled before authorizing the access.



Figure: Authorize Zendesk

The following screenshot displays the authorization of Ameyo Application Server to Microsoft Dynamics.

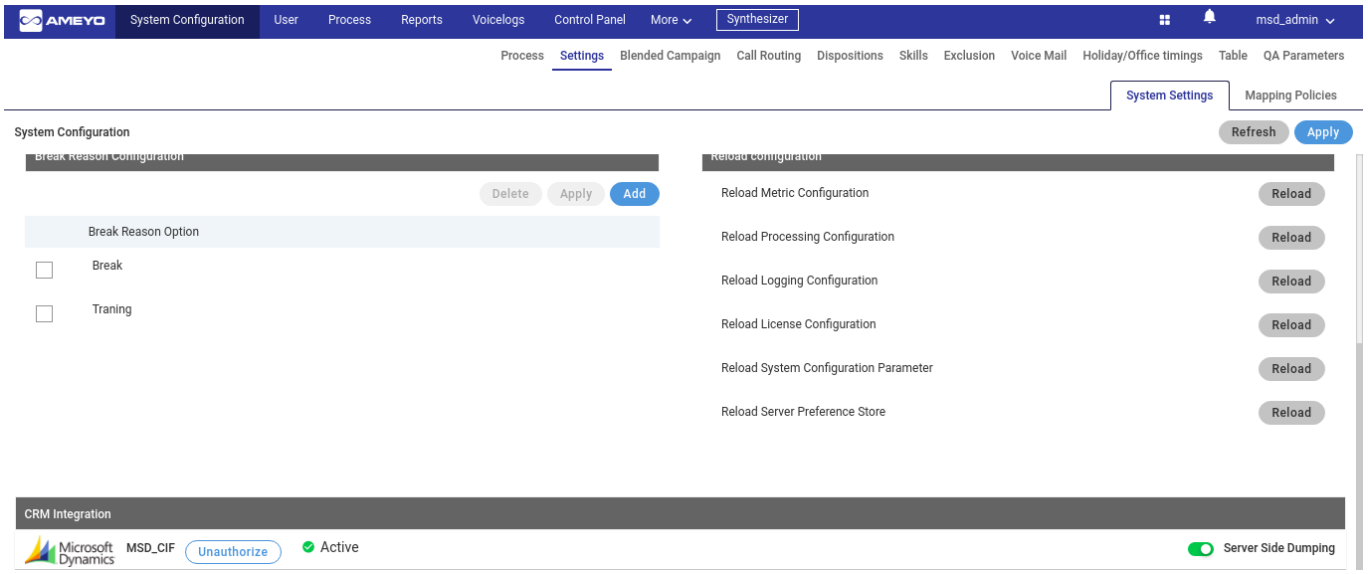


Figure: Option of Server-side Dumping for Microsoft Dynamics

After authorizing a linked Third-party App, the Administrator can click "Server-side Dumping" toggle switch to enable the server-side dumping of the data like Call Duration, etc.

The Administrator can click "Unauthorize" button to unauthorize the configured third-party app.

19.1.3.3.2. Ticket Settings

This section defines how tickets (primarily for Interaction Campaigns) are handled.

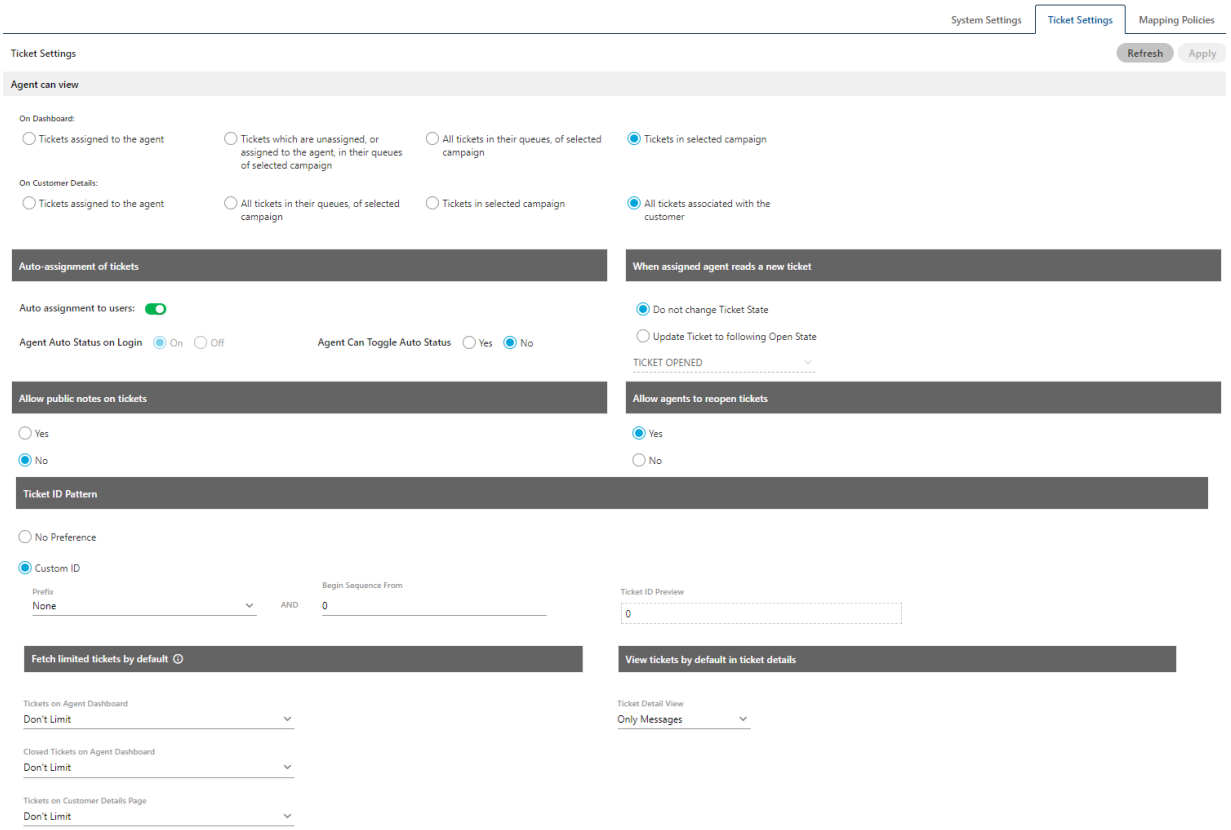


Figure: Ticket Settings

It contains the following settings:

Agent can view: Controls ticket visibility for agents.

- **On Dashboard:** Select what agents see on their main dashboard (e.g., only their assigned tickets, tickets in their queues, or all tickets in selected campaigns).
    1. **Tickets assigned to the agent:** Select it to let the agent view only those tickets that are assigned to him/her.
    2. **Tickets which are unassigned, or assigned to the agent, in their queues of selected campaigns:** Select it to let the agent view both those tickets which are unassigned and which are assigned to the agents in their queues of selected campaigns. The tickets assigned to other agents of queues to which he/she is not assigned, will not be displayed to him/her.

3. **Tickets in queues assigned to the agent in selected campaigns:** Select it to let the agent view those tickets in queues which are assigned to the agents in its selected campaigns. It will not show the tickets which are either unassigned or assigned to other agents who are staffed to another campaign, in which he/she was not staffed.
4. **Tickets in selected campaigns:** Select it to view the tickets which are assigned to the agents in the campaigns elected by the agent.

- **On Customer Details:** Select what agents see when viewing a specific customer's profile (e.g., only their tickets with that customer, or all tickets associated with that customer).
    1. **Tickets assigned to the agent:** Select it to let the agent view only those tickets that are assigned to the agent.
    2. **Tickets in queues assigned to the agent in selected campaigns:** Select it to let the agent view all tickets in the queue which are assigned to the agents in its selected campaigns.
    3. **Tickets in selected campaigns:** Select it to let the agent view the tickets in the selected campaigns.
    4. **All Tickets associated with the customer:** Select it to let the agent view all tickets associated with the customer.

Auto-assignment of tickets:

Use these settings to enable or disable automatic ticket assignment to users, and to allow or restrict agents from toggling their Auto-Status in interaction campaigns.

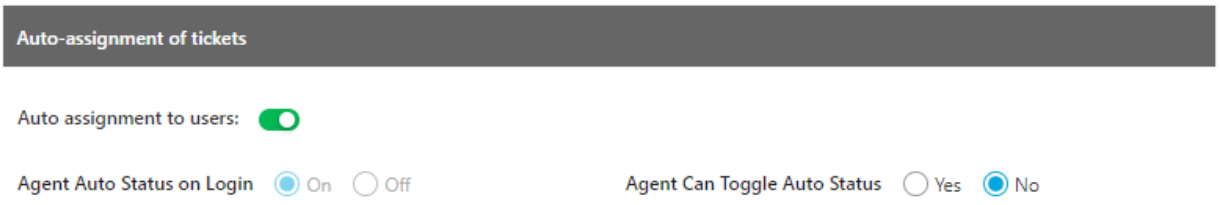


Figure: Auto-Assignment of Tickets

It contains the following options.

1. **Auto-assignment to users:** Toggle on to automatically assign new tickets to available agents.

> If this option is enabled, the Administrator also get "Auto-Assignment to users" option at the queue level that can be configured. The Queue-level "Auto-Assignment to users" option will override this auto-assignment option of System-level.

If it is enabled, the agents will be on "Auto-Status On" after their login in Interaction Campaign. The next option "Agent Can Toggle Auto Status" will allow or disallow agent to change this status.

The Administrator can turn off this option to not assign tickets automatically to the agents.

2. **Agent Auto Status on Login:** Select if agents are "Auto-Status On" by default when they log into an Interaction Campaign.
3. **Agent Can Toggle Auto Status:** Choose if agents are allowed to turn their own auto-assignment status on or off.

When assigned agent reads a new ticket:

By default, when the assigned agent reads a new ticket, its state changes to the "Open" internal state. If you want to set an external state (created under the "Open" internal state) as the default when an agent reads a new ticket, use this section to configure those settings. The following options are available here.



Figure: Set the State of New Ticket when the assigned agent reads it

1. **Do not change Ticket State:** The ticket's status remains "New".
2. **Update Ticket to following Open State:** Automatically changes the ticket's status to an "Open" state (e.g., "TICKET OPENED").

Allow Public Notes on tickets: Use this option to enable or disable public notes on tickets. Public notes are visible to all users. The following options are available:

- **Yes:** Select this to allow public notes on tickets.
- **No:** Select this to disable public notes on tickets.

Allow agents to reopen tickets:

Use this option to allow or restrict agents from reopening closed tickets. It includes the following choices:

- **Yes:** Select this to allow agents to reopen closed tickets.
  No: Select this to prevent agents from reopening closed tickets.

Ticket ID Pattern:

The administrator can now customize the ticket ID number at the system level.



Figure: Ticket ID Pattern

To configure a custom ticket ID, follow these steps:

1. Select "Custom ID" to define a custom ticket ID format.

2. Choose any of the following options as the prefix for the ticket ID:

- NONE: Select this option to exclude any prefix.

- YYYYMMDD: Select this option to use "YYYYMMDD" as the prefix.

- DDMMYYYY: Select this option to use "DDMMYYYY" as the prefix.

- MMDDYYYY: Select this option to use "MMDDYYYY" as the prefix.

> Here, DD, MM, and YYYY will be replaced with the corresponding day, month, and year values.



Figure: Customized date-based Ticket ID

- **Custom:** Select it to add the provided custom alphanumeric input as the prefix. Upon selecting, it enables an additional text field named "Value" at the bottom. You have to enter an alphanumeric value in it.



Figure: Custom-field based Ticket ID

3. **Begin Sequence From:** Enter the number from which the ticket ID sequence should start.

> Once the custom ticket ID configuration is applied, the system will display only the custom IDs throughout the Ameyo interface. The original ticket IDs will not be visible. For debugging purposes, the actual ticket ID can be retrieved using the corresponding custom ID.

Custom ticket IDs are also included in tickets exported to CSV files from the Agent Dashboard.

Improved Ticket Resolvers for Custom Ticket IDs:

When custom ticket IDs are used for the first time, the Ticket Resolvers in Email Media Profiles correctly append new incoming or reply emails to the same tickets, even after the default ticket IDs are replaced by custom ones.

> However, this functionality will not work if the custom ticket ID is changed again or reset to the default format. In such cases, the Ticket Resolvers in Email Media Profiles will no longer append new or reply emails to the same tickets.

Fetch Limited Tickets by default:

If a large number of tickets are present in the system, it may affect performance and cause delays while loading tickets in the Agent Console. To improve performance, the administrator can now define a date range to limit the tickets fetched in the Agent Console.

To configure this setting, navigate to:
System → System Configuration → Settings → Ticket Settings → Scroll to the bottom of the page.

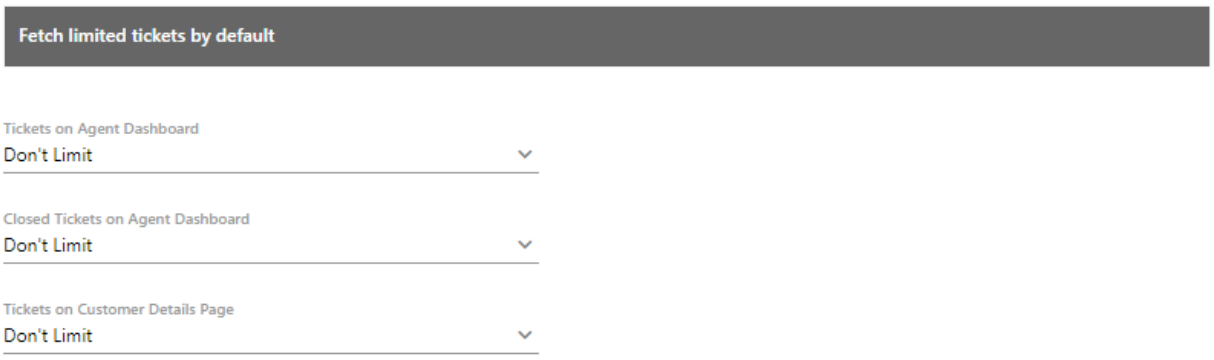


Figure: Option to Fetch Limited Tickets

This configuration includes the following three settings.

1. **Tickets on Agent Dashboard:**

This setting allows you to specify the time duration for which tickets will be displayed on the Agent Dashboard. Tickets outside the specified range will not be visible.



Figure: List of Available Duration for a Settings

It contains the following options:

- Don't Limit: Displays all tickets without applying a date filter. (Not recommended when a large number of tickets exist.)

- Past 3 Months: Displays tickets created in the last 3 months.

- Past 6 Months: Displays tickets created in the last 6 months.

- Past 12 Months:Displays tickets created in the last 12 months.

- Custom Range: Allows you to define a specific range (in months). When selected, a text box titled "Define Date Range (in months)" appears beside the "Tickets on Agent Dashboard" dropdown. Enter a value between 1 and 12.

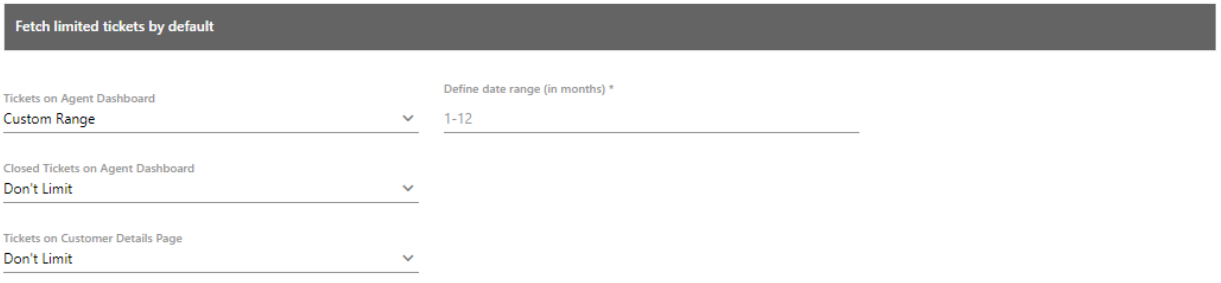


Figure: Custom Range Filter Option

- **Closed Tickets on Agent Dashboard:** This setting defines the duration for which closed tickets are displayed on both the Agent Dashboard and Customer Page. Tickets outside the selected range will not be visible. The available configuration options are the same as

those listed under “Tickets on Agent Dashboard.”

- **Tickets on Customer Details Page:** This setting controls the duration for which tickets are displayed on the Customer Details page. Tickets beyond the selected date range will not be displayed. It also includes the same options described under “Tickets on Agent Dashboard.”

View tickets by default in ticket details:

The administrator can configure the default ticket view that agents see when opening ticket details. This setting determines the initial display of ticket content based on the administrator’s selection. However, agents retain the flexibility to change the view from a drop-down menu as needed.

The administrator can choose from the following four ticket view options:

- **All:** Displays all transactions and messages related to the ticket.
- **Only Messages:** Displays only the messages exchanged on the ticket.
- **With Notes:** Displays messages along with any notes added to the ticket.
- **With Activity:** Displays all activities performed on the ticket, including messages, notes, and other actions.



Figure: Ticket Detail View List

19.1.3.3.3. Mapping Policies Tab

This tab's appearance changes based on what you selected in **System Settings > User Mapping Policy**. It's where you define the specific mappings.

1. IP Multiple User Call Leg Details Provider (Licensable)

If this option is selected in "User Mapping Policy" in "System Settings" tab, then the following screen is displayed here.

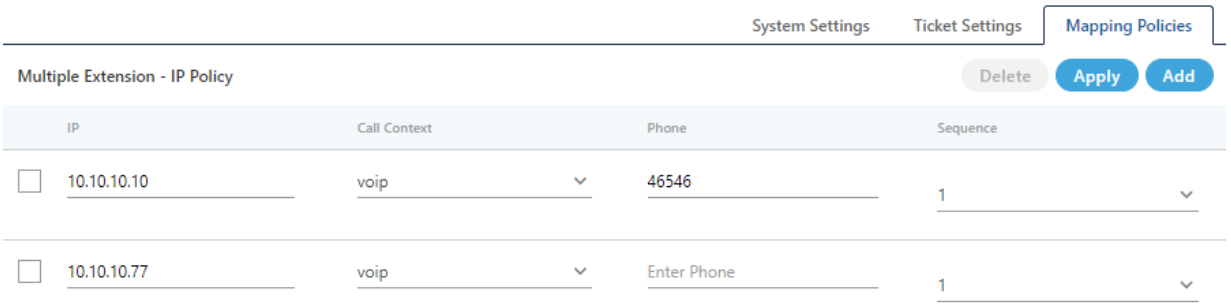


Figure: Configure Mapping Policy of "IP Multiple User Call Leg Details Provider"

It is IP-based Multiple Extension Policy, which allows the Administrator to assign multiple extensions to an IP Address. The Administrator has to perform the following the steps.

1. Click on **"Add"** button.
2. Enter the IP Address.
3. Select the Call Context.
4. Enter the Phone number (extension).
5. Select the Sequence.
6. Click on **"Apply"** button.

To delete any existing mapping, select the same and click on **"Delete"** button.

2. User ID Mapped Call Leg Details Provider (Licensable)

If this option is selected in "User Mapping Policy" in "System Settings" tab, then the following screen is displayed here.

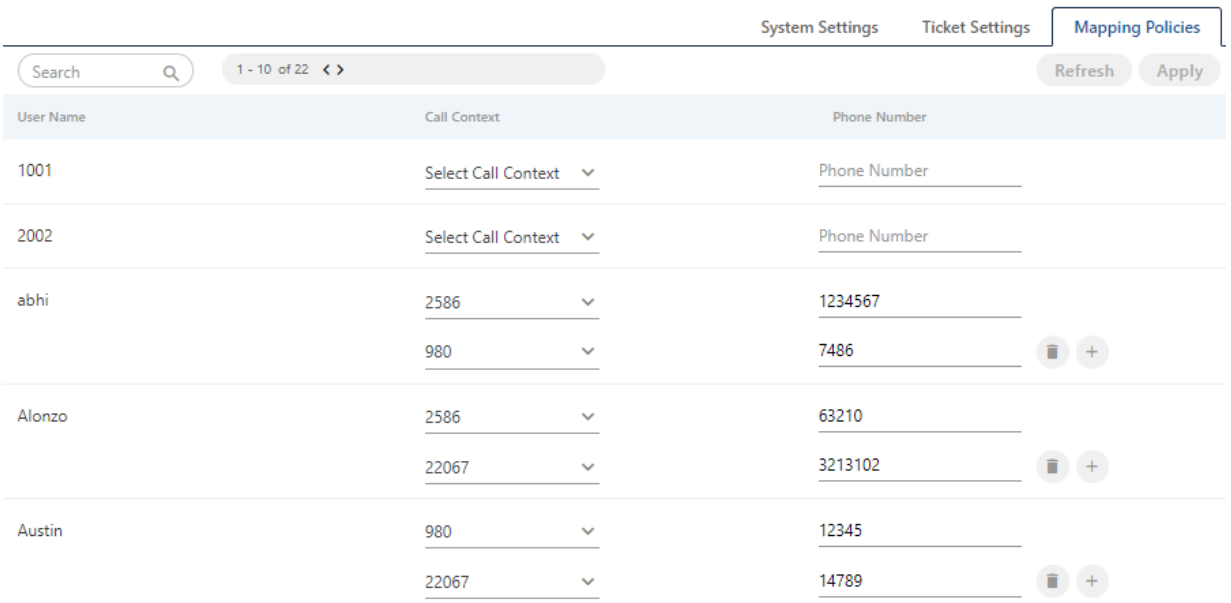


Figure: Configure Mapping Policy of "User ID Mapped Call Leg Details Provider"

It is currently in tabular format. Call Contexts and Phone Numbers are displayed for every user. Here, the Administrator can select the default call context and provide the number. If the user has been assigned multiple extensions, "+" icon is displayed with the phone number. The Administrator can click it and define multiple extensions. During logon, by default, these users will be assigned their respectively selected extensions and will not be asked to select the extensions.

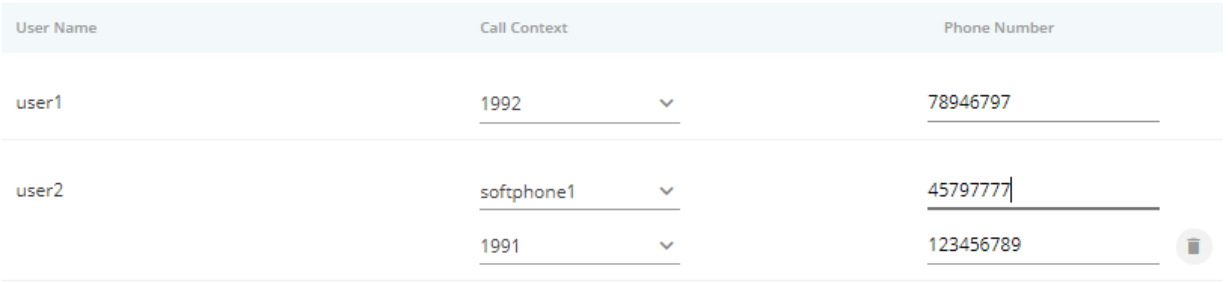


Figure: Mapped the Users with their Default Extensions in "Mapping Policies" Tab

After this configuration, when the agent (after logon to the system) selects the campaign in which the defined call context has been assigned to it, the agent will be logged on with the provided extension and it will not get the option to select other extensions.
For example, user1 has been assigned 1992 call context and 78946797 phone number. Now, user1, at the time of logon to the system, user1 (after selecting relevant campaign) will be logged on automatically at 1992 Call Context and 78946797 phone number.

The Phone Number can be edited in the Mapping Policy.

If a user is logged on to the Ameyo Toolbar Integration in a third-party application, then the user can use up to three extensions for the following call types simultaneously.

- inbound.call.dial
- outbound.auto.dial
- outbound.manual.dial
- transferred.to.campaign.dial
- outbound.callback.dial

However, this feature does not work simultaneously for the following call types in multiple extensions.

- click.to.call.dial
- outbound.auto.preview.dial
- outbound.manual.preview.dialing

3. User ID Based Call Leg Details Provider (Licensable)

> It is preferred to use this policy in case of WebRTC only. While using it, you have to configure WebRTC also. Please refer to the following document.
>
> **Reference Document:** WebRTC Manual

If this option is selected in "User Mapping Policy" in "System Settings" tab, then the following screen is displayed here. It is useful when you have multiple voice resources and you want to map users to these voice resources.

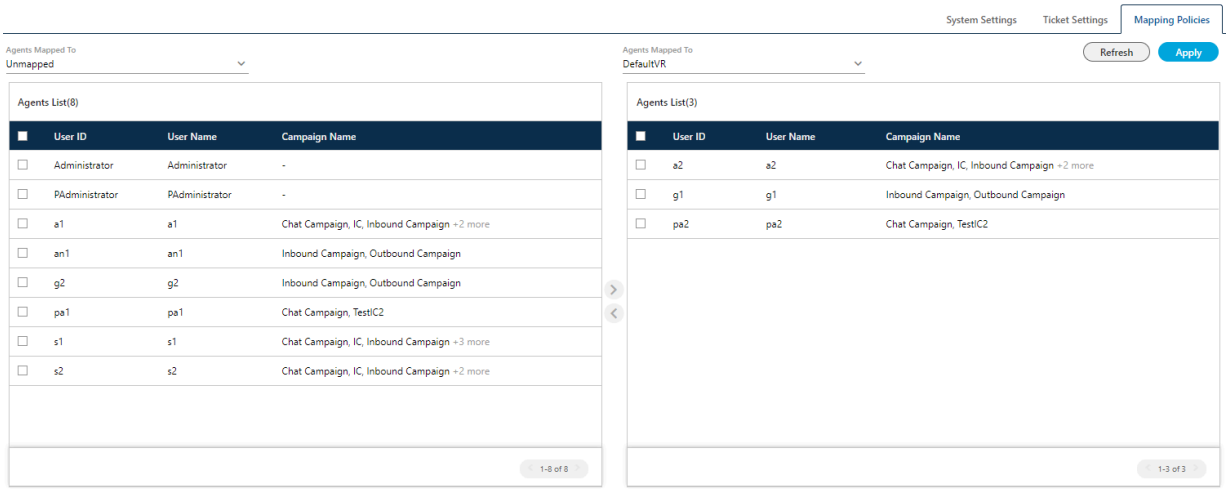


Figure: Configure Mapping Policy of "User ID Based Call Leg Details Provider"

The Administrator can select the users and map them to the available Voice Resources. This interface is divided into the two sections - Left Section and Right Section. The Administrator can map the unmapped users to a voice resource. Moreover, the Administrator can move the users between voice resources.

Perform the following steps.

1. Select the voice resource or "Unmapped" in "Agent Mapped To" drop-down menu of the Left Section. If you have added only one voice resource, it will show "Unmapped" option only. In the Left Section, the users will be listed as per the selected option.
2. Select the voice resource in "Agent Mapped To" drop-down menu of the Right Section.
3. Select the users in the Left 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.
4. Click on forward navigation button to add the selected users

> To unassign the users from a Voice Resource, select the voice resource in "Agent Mapped To" drop-down menu to list the users mapped to the selected voice resource. Now, select the users in the Right section and click on backward navigation icon

4. Manual User Call Leg Details Provider (Licensable)

If this option is selected in "User Mapping Policy" in "System Settings" tab, then the following screen is displayed here.

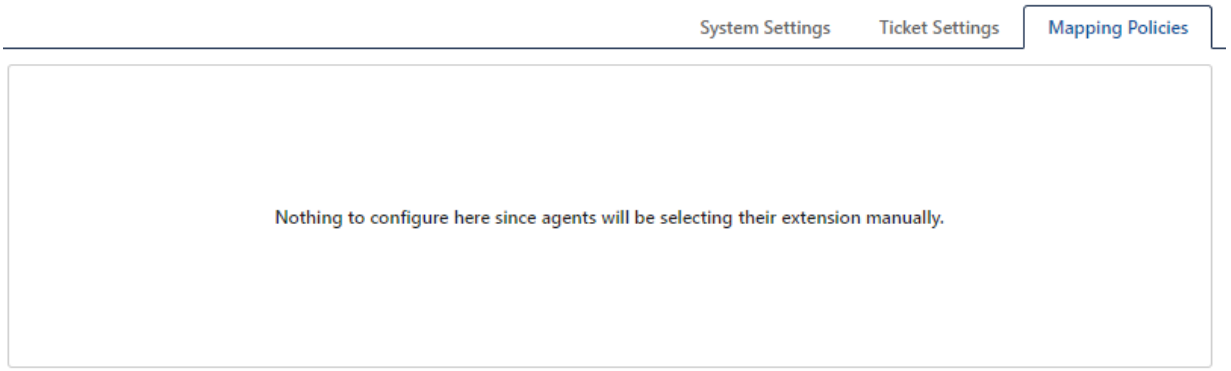


Figure: Configure Mapping Policy of "Manual User Call Leg Details Provider"

Here, the Administrator has to perform no action. The Agents will select the extensions on their own.

5. IP user call leg details provider (Licensable)

If this option is selected in "User Mapping Policy" in "System Settings" tab, then the following screen is displayed here.

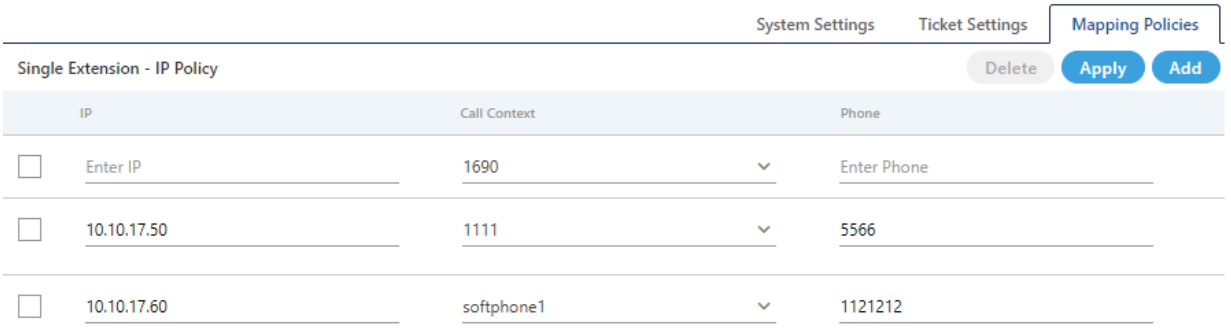


Figure: Configure Mapping Policy of "IP Based User Call Leg Details Provider"

It is an IP-based Single Extension Policy, which allows the administrator to define the Single Extension Policy for an IP Address.

1. Click on **"Add"** button.

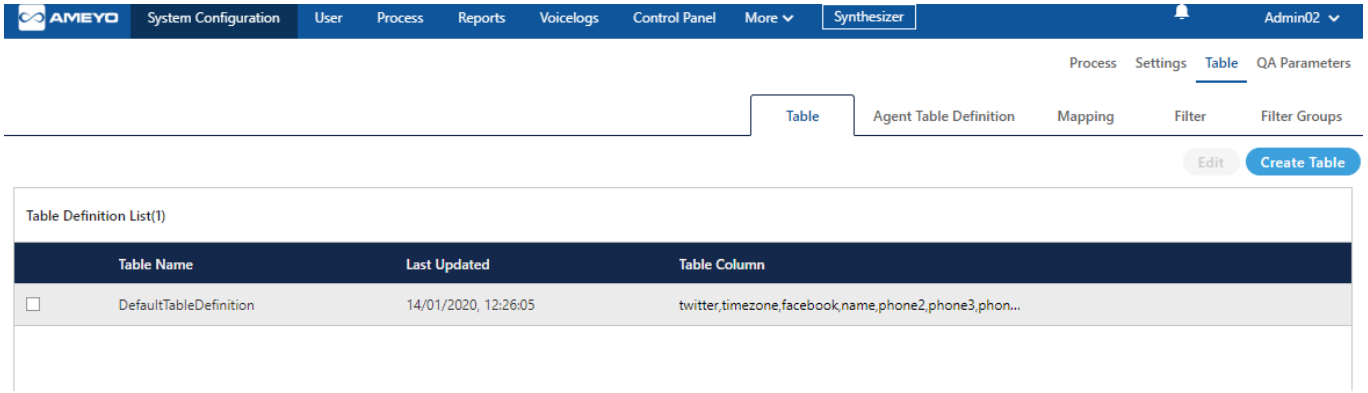
2. Enter the IP Address.
3. Select the Call Context.
4. Enter the Phone number (extension).
5. Click on **"Apply"** button.

To delete any existing mapping, select the same and click on "Delete" button.

19.1.3.4. Table in System Configuration

Table in System Configuration

Table tab stores the customer information (configuration related) in Ameyo. There are some fields required for the integration with Ameyo (Primary Key and others). In that case, we define the data types or columns.



It contains the following tabs.

- Table Definition
- Agent Table Definition
- Mapping Policies
- Filter
- Filter Groups

Click the links to know more about them.

19.1.3.4.1. Table Definition

In this tab, you can create, edit, and delete table definitions.

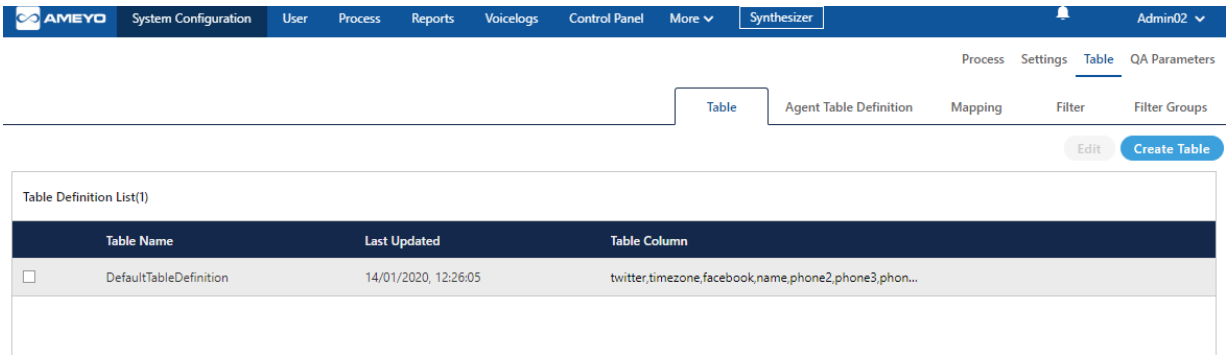


Figure: Table Settings in "System Configuration"

After creating the table definitions here, you can use "Mapping" tab to create the mapping and "Filter" tab to create the filters.

Create Table Definition

To create a new data table, follow these steps:

1. Click the **Create Table** button. A pop-up window will appear.

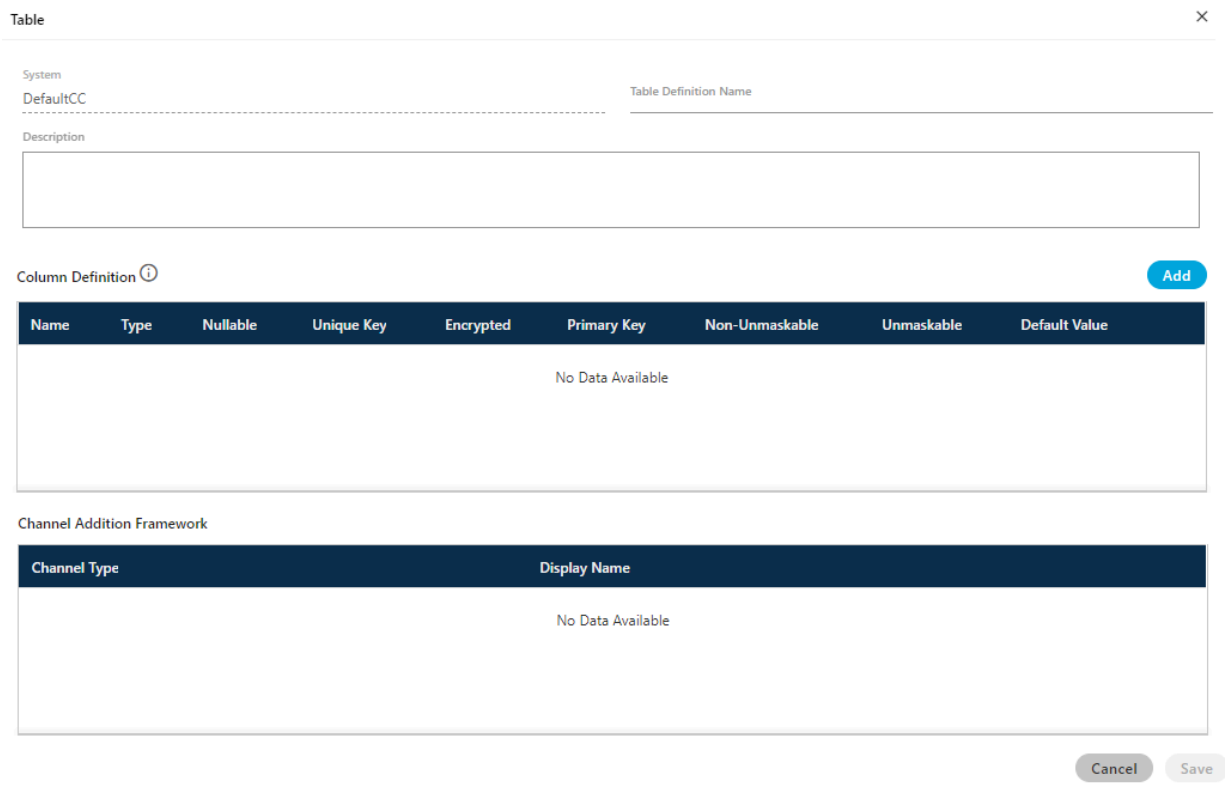


Figure: Create Table

2. Provide the following details:Following is a screenshot of a table containing different columns.

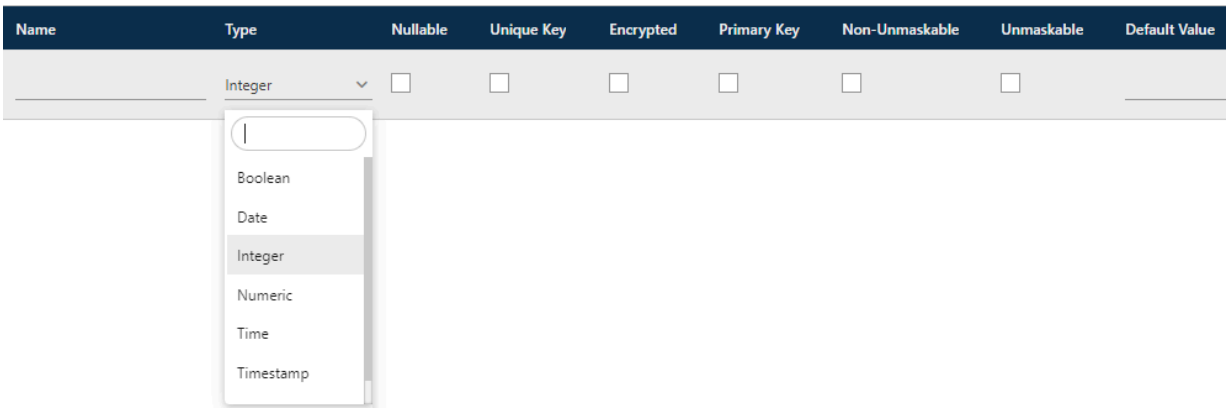
A. System: This contains the system ID which is taken by default.

B.Table Definition Name: Enter the name of the table. Only the underscore (_) is allowed as a special character; other special characters are not permitted.

C. Description: Enter a description for the table.

D. Column Definition: Perform the following steps to add a column.

- Click **Add** to add a column. A new row will appear.



- Provide values for the column fields:
    - **Name:** Column name to be provided. You can use only "_" (underscore) as a special character while providing a name for a Column. Other special characters are not allowed.
    - **Type:** Select any of the following options to specify the type of input received in this column.

    1. Integer: Select it to accept only whole numbers. It will not accept the decimals.
    2. Numeric: Select it to accept the numbers including decimals.
    3. Boolean: Select it to accept only two values that are "true" and "false".
    4. Varchar: Select it to accept the alphabets with numbers.
    5. Date: Select it to accept the date.
    6. Time: Select it to accept the time.
    7. Timestamp: Select it to accept the timestamp.

- **Nullable:** Select it to let any cell in the column to remain blank. If unchecked, it will be mandatory to enter some value in the cell.
- **Unique Key:** Select it to let the column accept only unique values in its cells.
- **Primary Key:** Select it to make the column primary.
- **Non-Unmaskable (Licensable):** It provides the option to mask the values stored in a field.

> The feature to unmask the already masked values will not be provided. So, use this feature consciously.

All or only important fields can be masked. If the Administrator selects a field to be maksed, then whatever data will be stored in this field will be masked at User Interface of the entire

Ameyo System, in Customer Manager API, and at the backend, in the databases of PostgreSQL. For example, the data will be masked in `AmeyoRefresh` and `CustomerProspect` tables. Except the last 4 characters, all characters in the data will be masked with "X" letter such as XXXXXX1234.

> If you are modifying an existing Table Definition or creating a new one in an already existing Ameyo Setup, only the new data will be masked in the field selected for masking, however, the old data will not be masked.

Perform the following steps to enable the masked Data Processor

1. Execute the following query to verify whether the maskDataPreProcessor is available or not.

```
SELECT * FROM system_configuration_parameter WHERE name =
'customerManagerPreprocessorsNames';
```

2. Execute the following query to enable the maskDataPreProcessor if it is not available.

```
update system_configuration_parameter set
value='duplicatePreprocessor,numberRegexMatcherPreprocessor,standardNumberFor
materPreprocessor,maskDataPreProcessor' where
name='customerManagerPreprocessorsNames';
```

3. Run the following query.

```
update column_definition set masking_policy_type='FIRST_X_LAST_Y_UNMASKED'
where name=''; Update column_definition set
masking_policy_properties='{"last_y_characters":"4","masked_string":"","first
_x_characters":"6"}' where name='<Column_Name_To_Mask>';
```

It is configurable that how many digits of the data has to be masked or unmasked from starting and how many digits has to be masked or unmasked from the end.

Suppose the card number of 10 digits has to be masked. If it is configured that first 5 digits will be unmasked and the last 5 digits will be unmasked, then the complete number will remain unmask.

If you select "Masked" for a field, then it cannot be "Primary Key" and "Unique Key". Also, default value of "Type" for a Masked field will be "VARCHAR" and it cannot be changed.

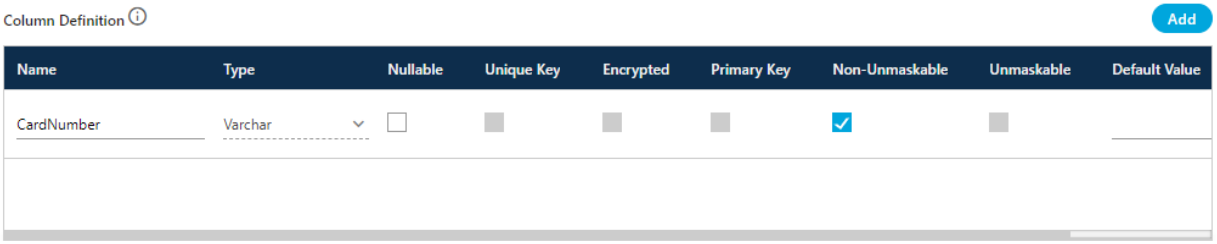


Figure: Sample Values to create a Table

There may be some cases arise when you have to disable the mask data fields. In this case, run the following query to disable the Mask Data Field.

```
update system_configuration_parameter set
value='duplicatePreprocessor,numberRegexMatcherPreprocessor,standardNumb
erFormaterPreprocessor' where name='customerManagerPreprocessorsNames';
```

- **Unmaskable:**If selected, then the values of this field will not mask.
- **Default value:** Enter the default value that will be displayed in all cells of this column.

You can add multiple columns using the same steps.

Following is a screenshot of a table containing different columns.

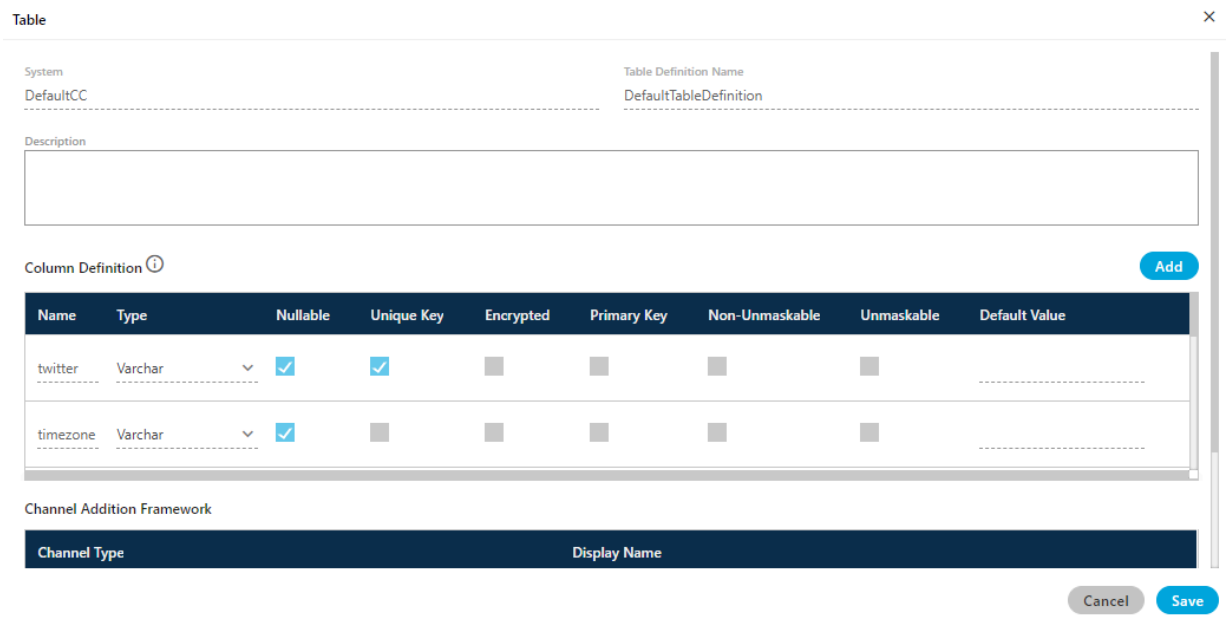


Figure: Sample Values to create a Table

Click **"Save"** to create a table. Following screenshot shows a newly created table.

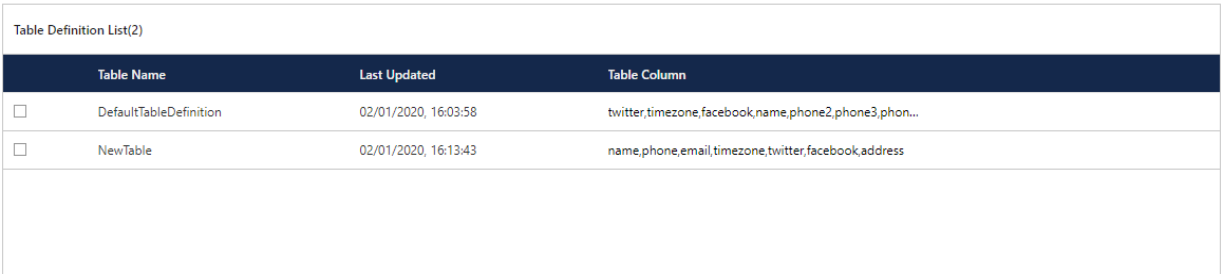


Figure: Created a Table

Modify Table Definition

Perform the following steps to edit the table.

1. Select a table and click "Edit".

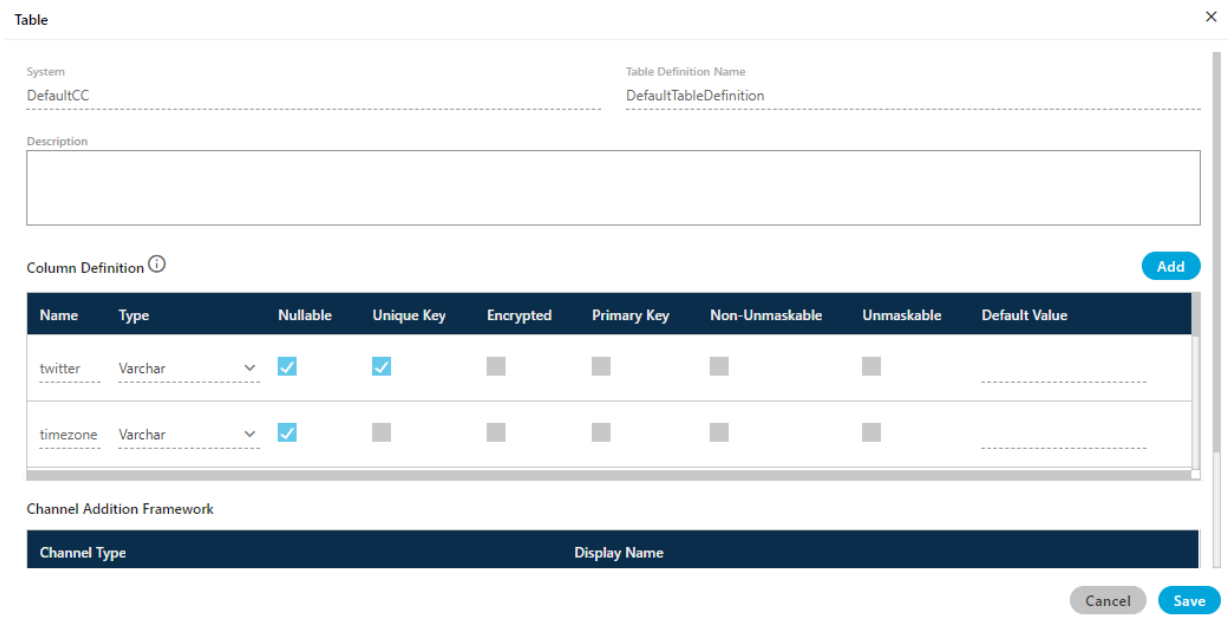


Figure: Modify a Table Definition

2. You can change the following fields here.You cannot modify or delete the columns. Also, you cannot modify the column properties such as name, type, Nullable, unique key, primary key, or default value.
    1. **Add new column:** You can add the new columns in the table definitions. Click "Add" button to add the new column. A blank row is added at the bottom of the table. Here you can define the properties of the table column.
    2. **Table Definition Name:** Change the name of the table.
    3. **Description:** Change the description.

> You cannot modify or delete the columns. Also, you cannot modify the column properties such as name, type, Nullable, unique key, primary key, or default value.

3. Click "Save" to save and apply the changes.Click "Cancel" to cancel the changes.

Delete Table Definition

Perform the following steps to delete a table.

1. Select the table and click "Delete". It shows the following warning message.

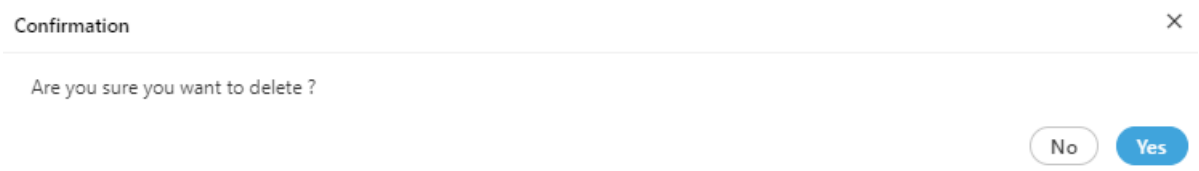


Figure: Asking to delete a table

2. Click "Yes" to delete the selected table.

   You can click "No" to not delete the table.

19.1.3.4.2. Agent Table Definition

The Agent Table Definition serves as a template to define the fields (or columns) used to store customer information on the Agent Dashboard. Its user interface allows the administrator to assign specific fields to individual agents. Agents not assigned certain Table Definition Fields will be unable to view, access, or modify those customer information fields. The administrator also controls which agents have permission to modify the assigned fields.

> Additionally, the administrator can arrange the sequence in which these definition fields appear.

Whenever a new Data Table Definition is created, a default Agent Table Definition is automatically generated. By default, all fields from the Data Table Definition are assigned as visible in this default Agent Table Definition. To control what information agents see and edit, administrators must create new Agent Table Definitions specifying field visibility and edit permissions.

A new sub-tab named **Agent Table Definition** has been added under the **Table** tab in **System Configuration** within the Administrator Console.

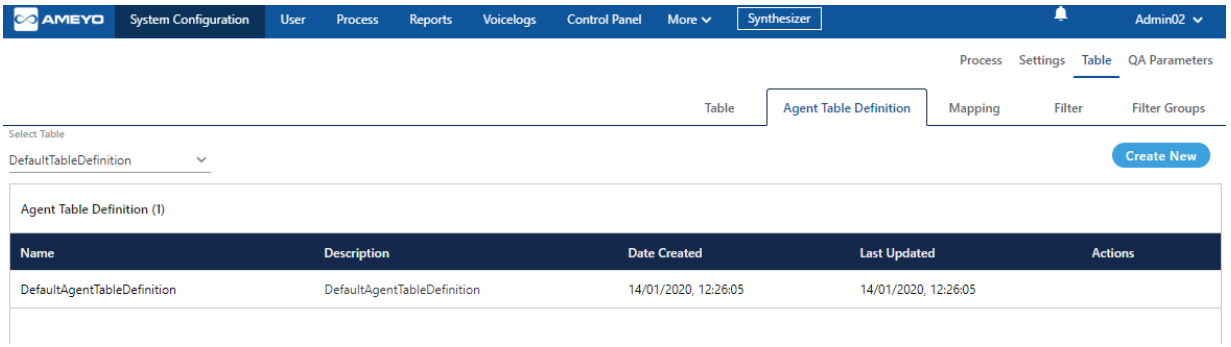


Figure: New Tab of Agent Table Definition

Create New Agent Table Definition

Perform the following steps to create a new Agent Table Definition.

1. Click "Create New" button on the top-right corner to create a new Agent Table Definition. It shows the following page.

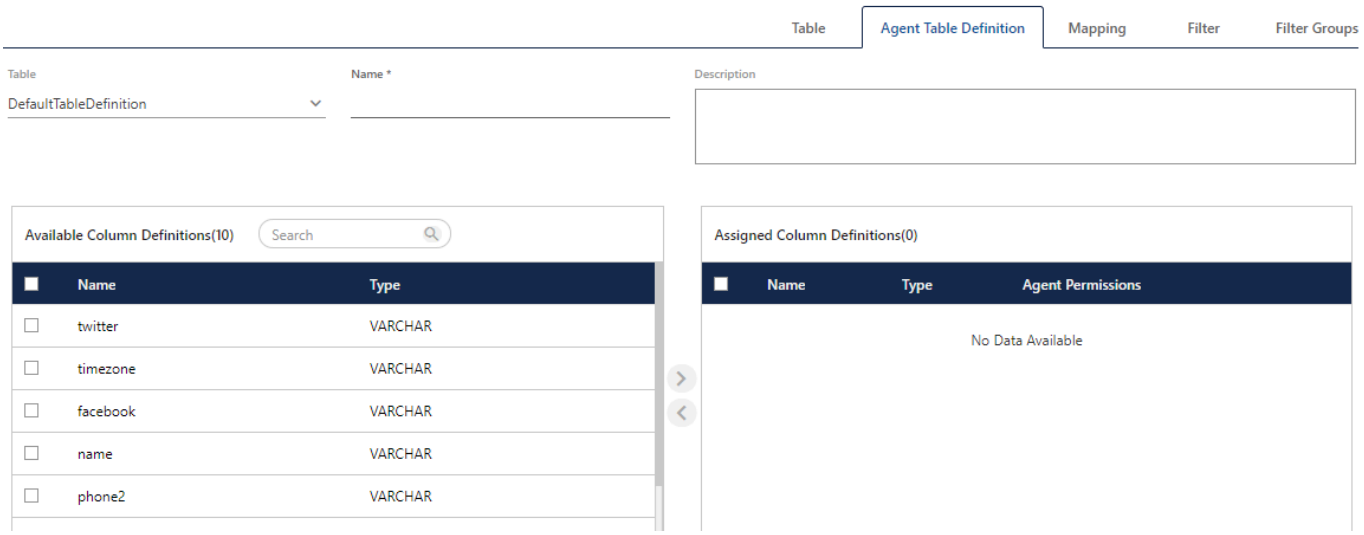


Figure: Create New Agent Table Definition

2. In "Table" drop-down menu, select the Table Definition for which you want to create the Agent Table Definition. The fields of the selected table will be listed in "Available Column Definitions" section.
3. Provide a name for the Agent Table Definition.
4. Provide the description, if required.
5. Now, select the fields in "Available Column Definitions" that you want to assign to the agents. Click forward icon to move the fields to "Assigned Column Definitions" section.

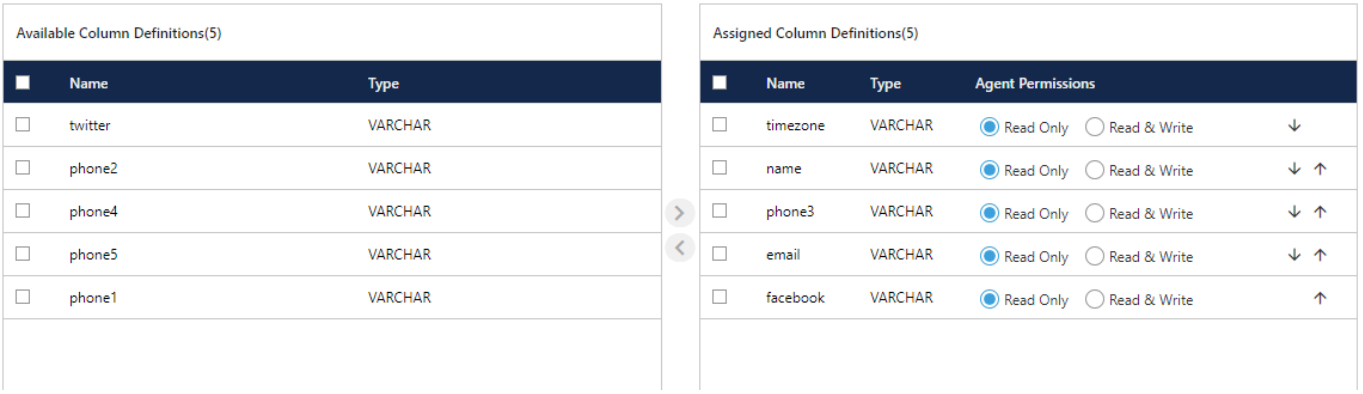


Figure: Assign and Unassign Fields

6. **Enable or Disable Field Modification:** In "Assigned Column Definitions" section, you can select the following options for every field.
    - **Read Only:** Select this option to allow the agents to only read the Customer Information stored in this field. The Agents cannot modify the customer information in this field.

- **Read & Write:** Select this option to allow the agents to read and modify the Customer Information stored in this field.

7. **Order of Appearance of Fields:** The top to bottom positioning of the fields in "Assigned Column Definitions" section will be the order of appearance of the fields in the Customer Information. The following screenshot displays the sample order of appearance of fields.

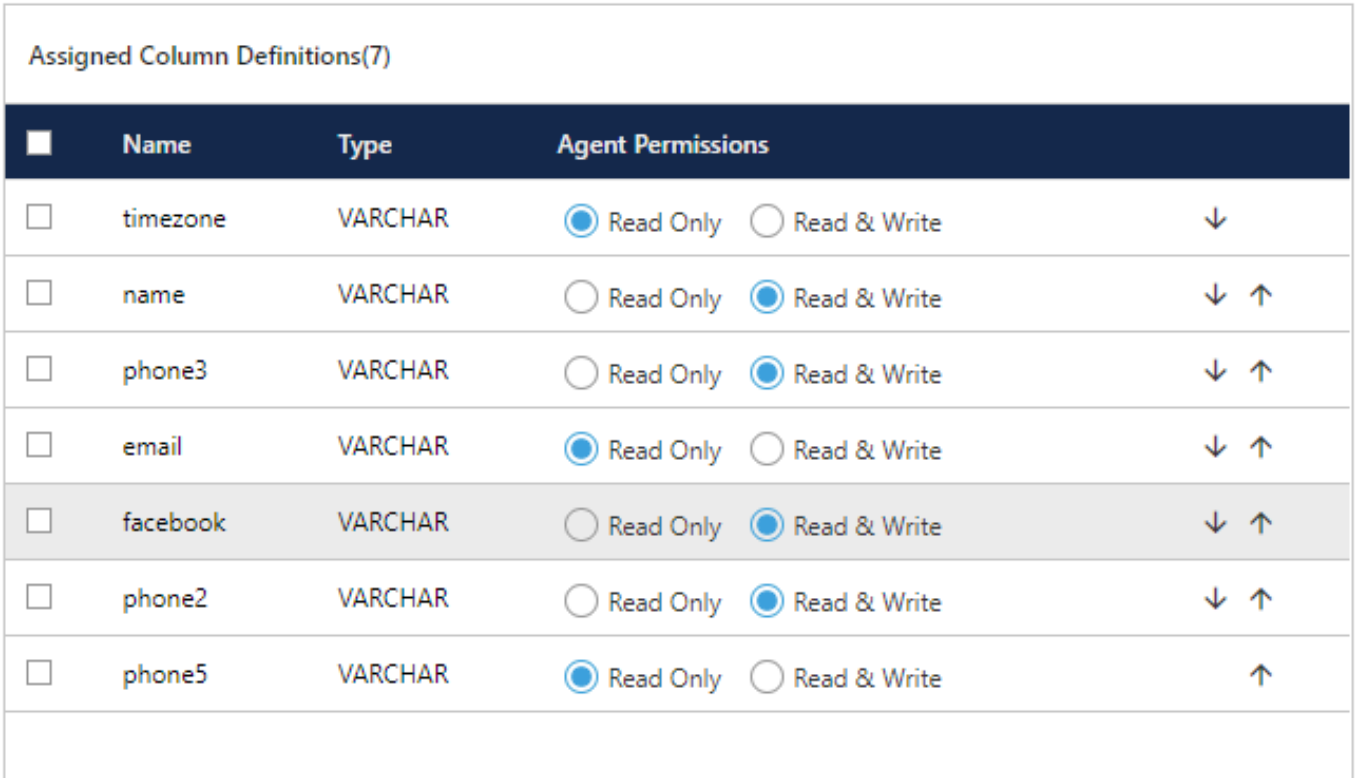


Figure: Sample Order of fields

You can click "↓" icon to move the field to bottom and click "↑" to move the field up. After every click on any of these icons for a field, the positioning of that field will change.

8. Click "Save" to save the Agent Table Definition. It takes you back to "Agent Table Definition" Tab, which shows the list of Agent Table Definitions including the newly created one.

> You can assign or unassign the fields, make the fields editable or non-editable, and change the order of their appearance even while modifying the default or custom Agent Table Definition.

Modify an Agent Table Definition

"Agent Table Definition" tab shows the list of existing Agent Table Definitions.

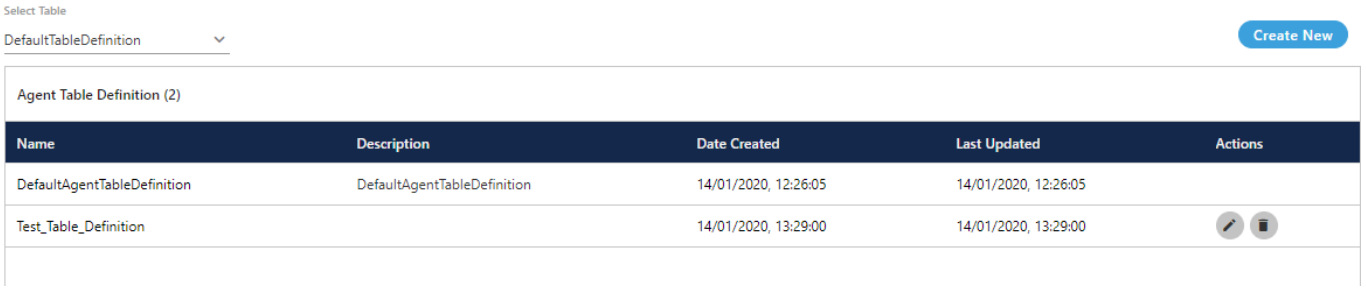


Figure: List of Agent Table Definitions

Perform the following steps to modify an existing Agent Table Definition.

1. Click on edit icon for an existing Agent Table Definition to modify it using the following page.

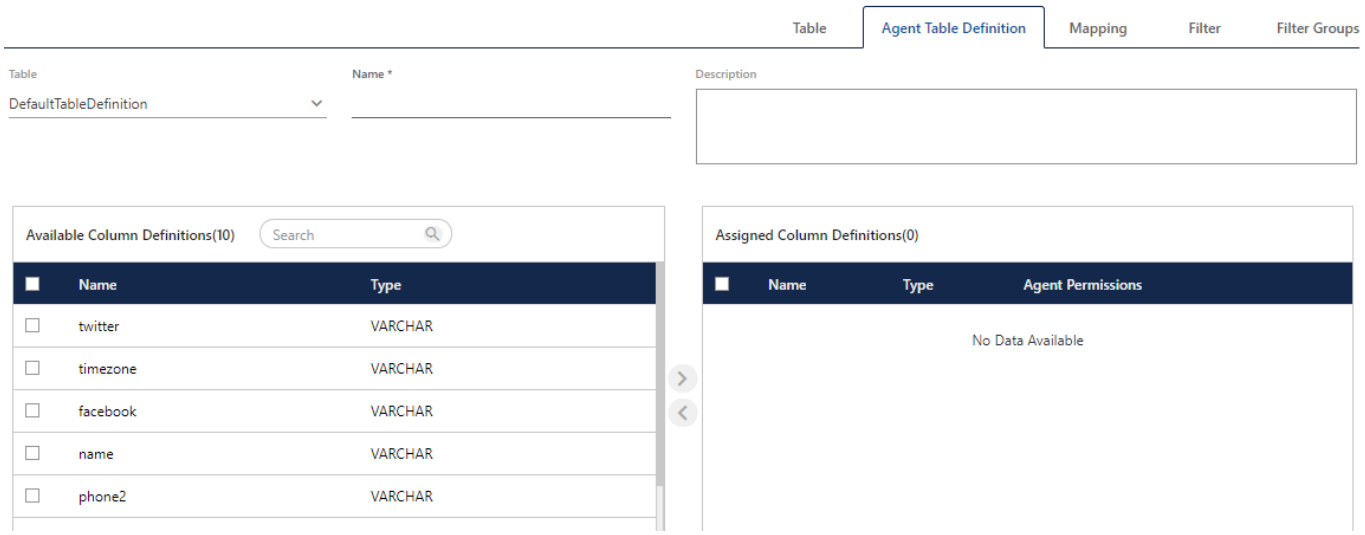


Figure: Page to modify an existing Agent Table Definition

2. You can make the following changes.

- Name of Agent Table Definition

> If you change the name of an existing Agent Table Definition, which has been selected and applied on a Campaign, then it may not work in that campaign.

- Description
- Assign or Unassign the Table Definition Fields
- Mark the Agent Table Definition fields as "Read Only" or "Read and Write"
- Change the order of appearance of these fields

3. Click "Save" to save the changes.

Rather click "Cancel" to discard the changes.

> The changes made in Agent Table Definition will be applicable in real-time. However, these changes will be displayed to the agents only when they open a new Customer page after that change.

Delete Agent Table Definition

> The Deleted Agent Table Definition cannot be restored in any way. It will not be used in the Campaign and in the Agent Console. If the Agent Table Definition is assigned to a campaign and is being used by the agents, then the agent may not be able to that Agent Table Definition for the new Customer Communication until a new Agent Table Definition is assigned.

"Agent Table Definition" tab shows the list of existing Agent Table Definitions.

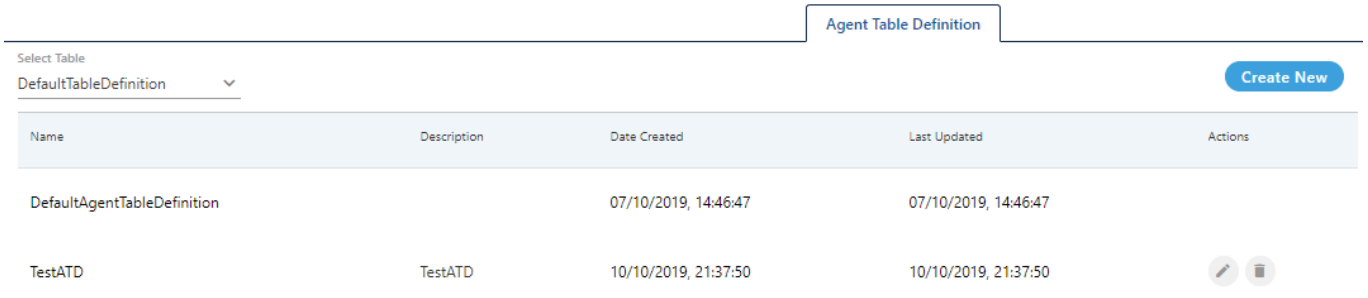


Figure: List of Agent Table Definitions

Perform the following steps to modify an existing Agent Table Definition.

1. Click on delete icon to delete an existing Agent Table Definition. It shows the following warning message.

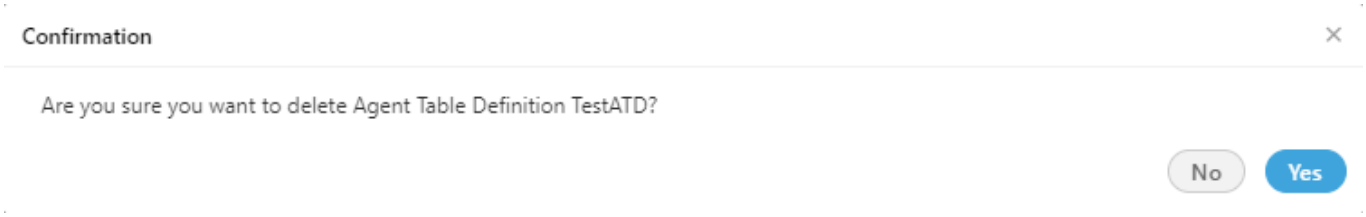


Figure: Pop-up to confirm the Deletion of Agent Table Definition

2. Click "Yes" to delete the Agent Table Definition.

Rather, click "No" to not delete it.

"DefaultAgentTableDefinition" cannot be deleted. When the Administrator tries to delete it, the system shows the following error message on the screen.

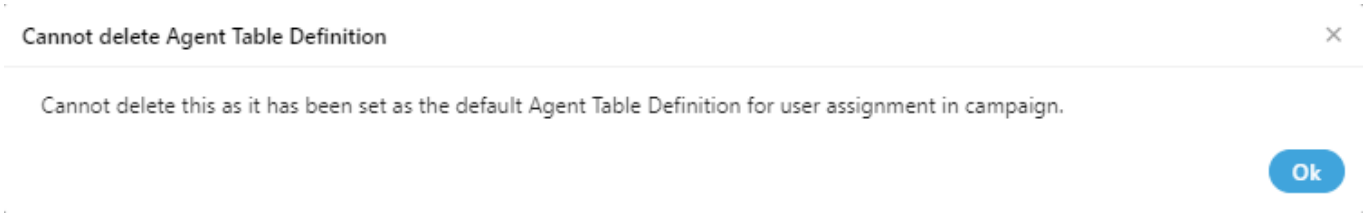


Figure: Error while deleting the Agent Table Definition

19.1.3.4.3. Table Mapping

This tab lets you edit and delete the default existing table column mappings. You can also create, modify, and delete the custom table column mappings.

Click "Select Table Definition" drop-down menu to select the table definition, in which you want to create, edit, and delete the table column mappings.

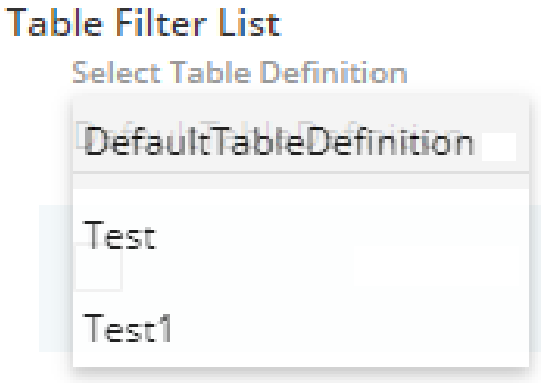


Figure: Select Table Definition

The default table column mappings are available only in "DefaultTableDefinition".

Create Table Mapping

Administrator needs to follow below steps to create a new mapping.

1. Click"Create New Mapping" button. Following pop-up named "Create Table Mapping Wizard" is displayed on the screen

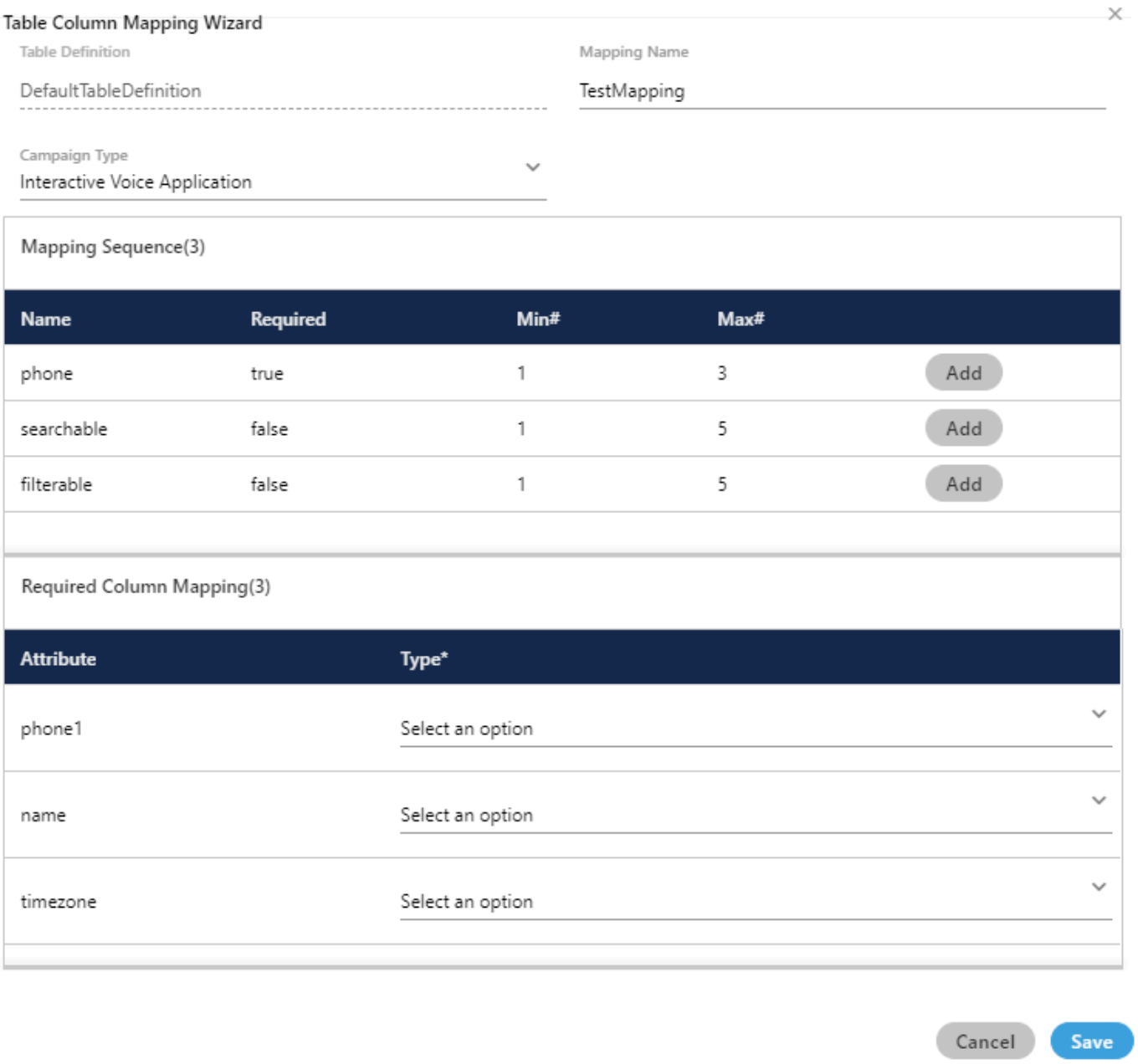


Figure: Create Table Column Mapping

2. Administrator needs to fill the following details in order to create a new mapping.
    1. **Mapping Name** :Provide a mapping name.
    2. **Campaign Type** :Select the Campaign type from the provided drop-down. It contains the following options.
        1. Interactive Voice Application
        2. Outbound Voice Campaign
        3. Interaction Campaign
        4. Parallel Predictive Voice Campaign
        5. IVR Campaign

6. Voice Blast Campaign
7. Chat Campaign

3. **Mapping Sequence** :By default, the following two mapping sequences are displayed here.

- **Searchable (Licensable: 5 to 10 fields):** It lets you add the searchable and optional columns in the mapping. It is not necessary to create the searchable fields. Through this feature the column on which the searchable field is applied, the column becomes searchable, means a search bar appears on the column which allows the user to search for any of the data.
- Buy the license to increase the number of searchable fields. After purchasing the license, run the following query.

```
INSERT INTO system_configuration_parameter(name,type,value,default_value)
VALUES
('maxSearchableFieldsAllowed','Integer','<number_of_searchable_fields>','
<number_of_searchable_fields>');
```

> The maximum number of searchable fields (after both license and configuration) is 10. After purchasing licenses, perform the configuration to increase the number of fields, if any step missed then number of fields will not increase. Contact either Marketing Department or Services Team of Ameyo.

- **Phone (Licensable: 5 to 50 fields):** It lets you add the mandatory columns in the mapping. It is mandatory for the user to fill these columns.
- Buy the license to increase the number of phone fields. After purchasing the license, run the following query.

```
INSERT INTO system_configuration_parameter(name,type,value,default_value)
VALUES
('max.phone.allowed','Integer','<number_of_phone_fields>','<number_of_phone_f
ields>');
```

> The maximum number of phone fields (after both license and configuration) is 50. After purchasing licenses, perform the configuration to increase the number of fields, if any step missed then number of fields will not increase. Contact either Marketing Department or Services Team of Ameyo.

4. **ilterable:** It lets you add the filterable columns in the mapping. The user can leave these columns blank. Through this feature the administrator now have another filter field through which he can filter for the required voicelogs.

- Buy the license to increase the number of filterable fields. After purchasing the license, run the following query.

```
INSERT INTO system_configuration_parameter(name,type,value,default_value)
VALUES
('maxFilterableFieldsAllowed','Integer','<number_of_filterable_fields>','<num
ber_of_filterable_fields>');
```

> The maximum number of filterable fields (after both license and configuration) is 10. After purchasing licenses, perform the configuration to increase the number of fields, if any step missed then number of fields will not increase. Contact either Marketing Department or Services Team of Ameyo.

3. You have to click "Add" for a Mapping Sequence to add its column.You cannot edit or delete the column mappings here.
4. **Attribute :** User can select the attributes for the added column mappings. It has the following options.
    1. twitter
    2. timezone
    3. facebook
    4. name
    5. phone1
    6. phone2

7. phone3
8. phone4
9. phone5
10. email

5. **Type:** You have to select the types of these attributes for the added column mappings.

Following screenshot shows the sample table mapping for a custom "Test1" table definition.

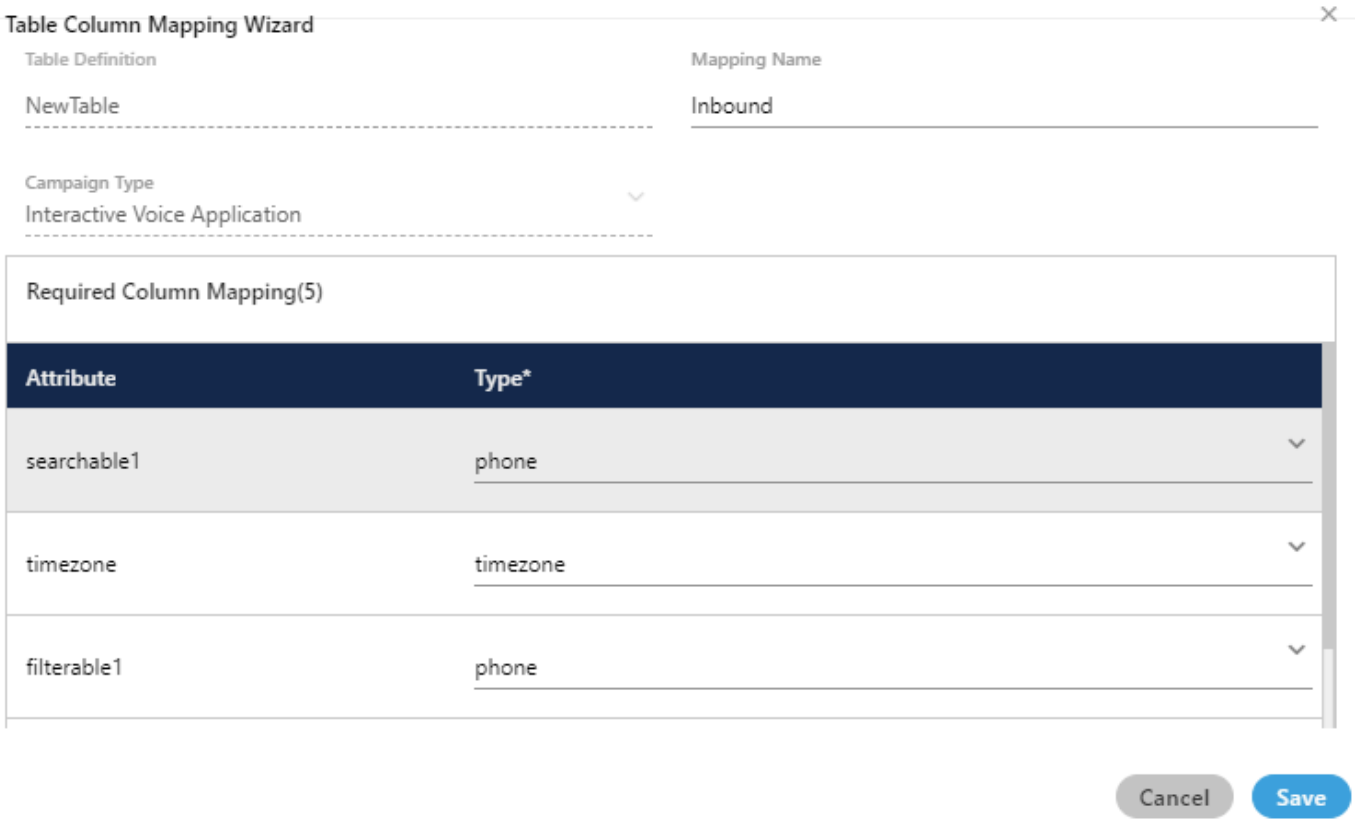


Figure: Sample Table Mapping

Click **"Save"** to create the table mapping.

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

Following screenshot shows two newly created table mappings.

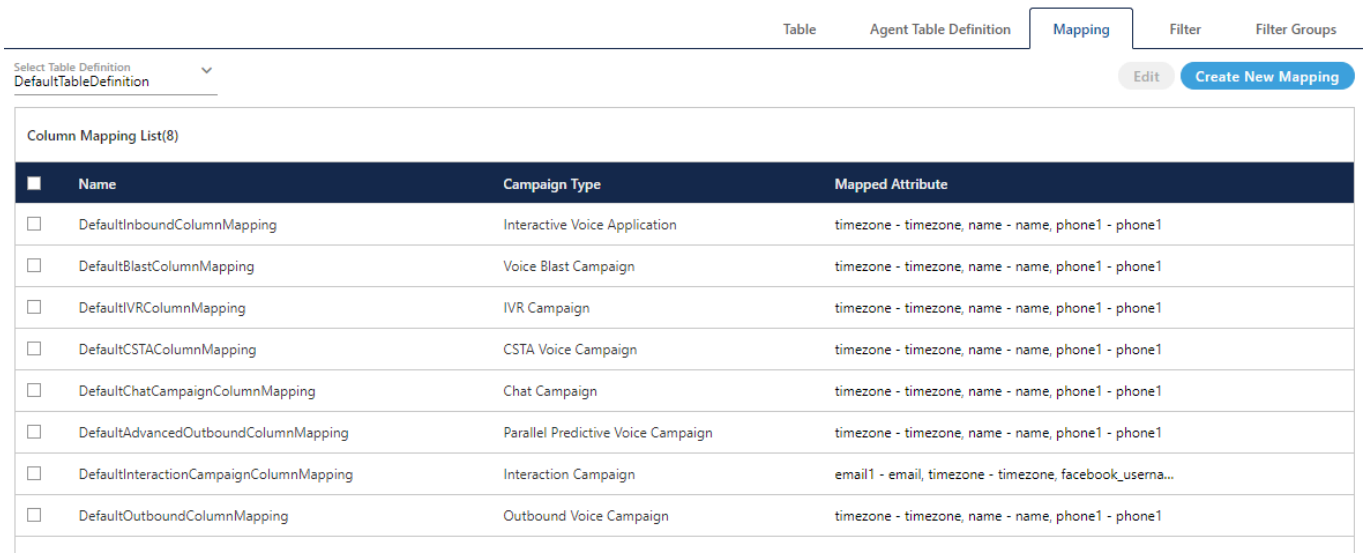


Figure: Table Mappings

Modify Table Mapping

Perform the following steps to edit a table mapping.

1. Select the table definition in "Select Table Definition" drop-down menu. The mappings of selected definition are displayed.
2. Select a table and click "Edit".

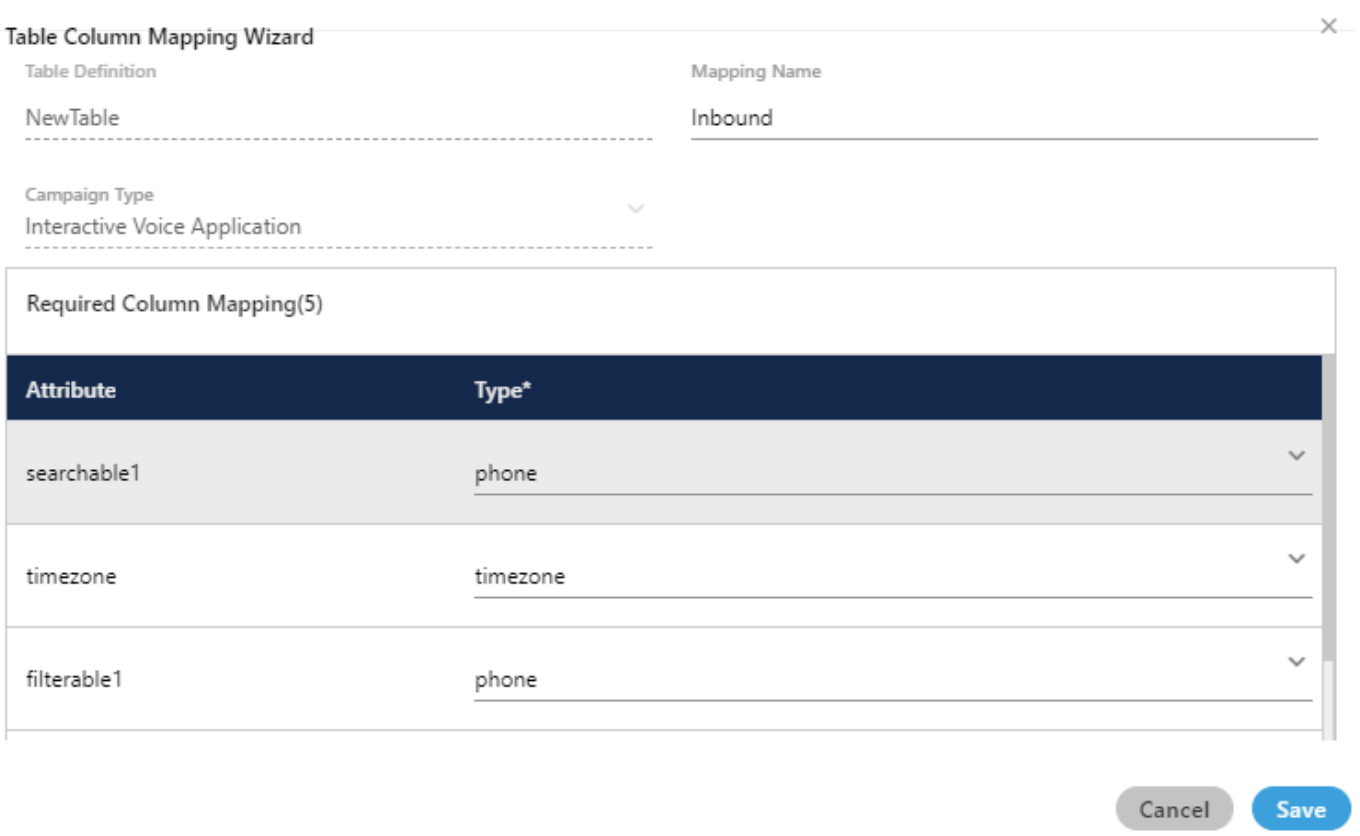


Figure: Edit a Table Column Mapping

3. You can change the following fields here.
    1. **Mapping Name:** Change the name of the mapping.
    2. **Mapping of Attributes:** You can change the mapping of attributes.
4. Click "Save" to save and apply the changes.

> You cannot change the table definition name and campaign type. Attributes cannot be added, edited, or deleted.

Delete Table Column Mapping

Perform the following steps to delete a table column mapping.

> It is recommended not to delete the default table column mappings available in the default table definition (DefaultTableDefintion).

1. Select the table definition in "Select Table Definition" drop-down menu.
2. Select the mapping and click "Delete". It shows the following warning message.



Figure: Asking to delete a Table Column Mapping

3. Click "Yes" to delete the selected mapping.
   You can click "No" to not delete the mapping.

19.1.3.4.4. Table Filters

Here, you can create, edit, and delete filters for the table definitions. This creates saved filters that are used in outbound campaigns to define dialing logic (i.e., *which* customers to dial)

> Table Filters are used to filter the customers in Outbound, Parallel Predictive and Voice Blast Campaigns. Administrator has to assign the required Table Filters in "Customers" Tab in the Settings of these campaigns.

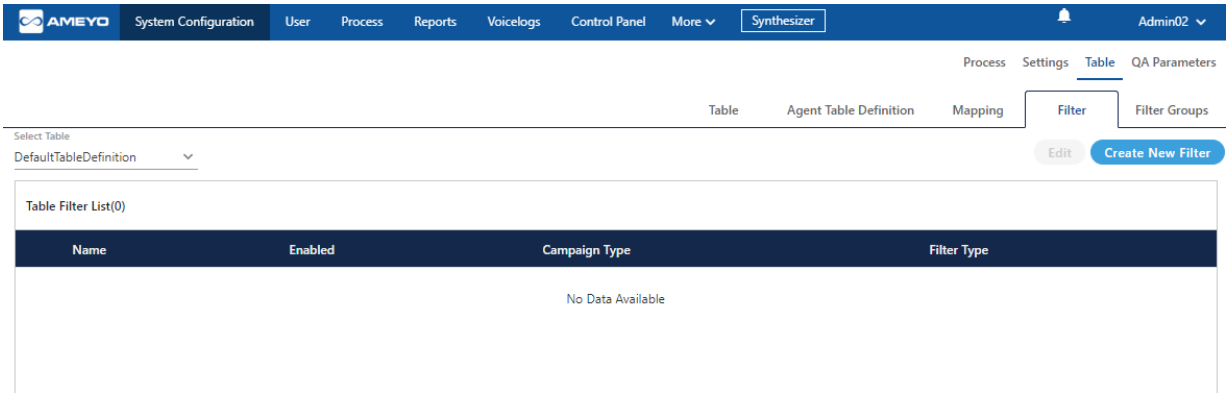


Figure: Table Filters

Click "Select Table Definition" drop-down menu to select the table definition, in which you want to create, edit, and delete the table filters.

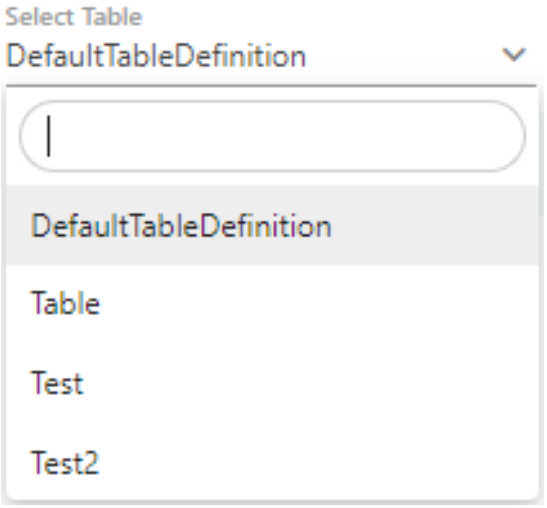


Figure: Select Table Definition

You can use search box in the top row to search for the particular table definition.

Create Table Filter

Administrator needs to follow below steps for creating new filters.

1. Select the table definition.
2. Click "Create New Filter" to create a new table filter.

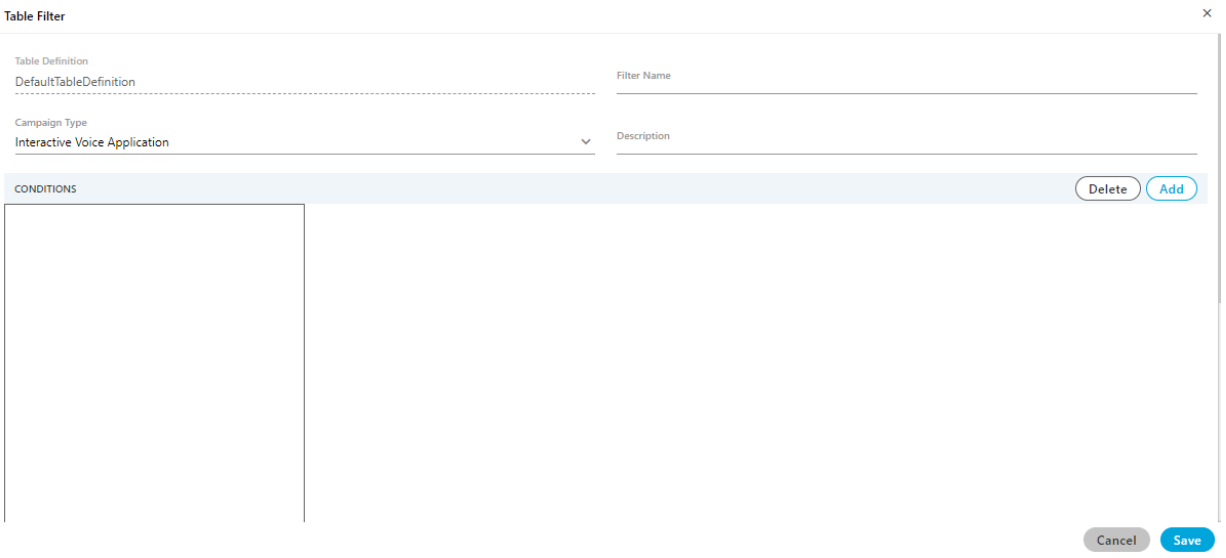


Figure: Create a Table Filter

3.Administrator needs to fill the following details in order to create new mapping.

- **Filter Name:** Provide a name of the filter.
- **Campaign Type:** Select the campaign type from the drop-down menu. It contains the following options.
    1. Outbound Voice Campaign
    2. Parallel Predictive Voice Campaign
    3. Voice Blast Campaign
- **Description:** Enter the description regarding the filter.
- Click "Add" to add a clause. Each clause has a condition to filter the table. It adds a row on the right. Perform the following steps to add a condition in a newly added clause.
    1. 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

2. After selecting "Left Operand", you have to provide a value for that operand in the cell under "Condition" column. The value should contain a operator such as =, < or >. The following table shows some examples of some operands.

Operand	Value
ATTEMPTS	='1'
	<'1'
	>'1'
CustomerID	='1234'
	<'1234'
	>'1234'
Phone1	='2111155555'
	<'2111155555'
	>'2111155555'

Table: Sample Values of Operands

> If you do not add operator or single quotes, you may get error while adding or modifying the table filter.

3. You can click "+" icon on the right side of a row to add a new condition.
4. 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.

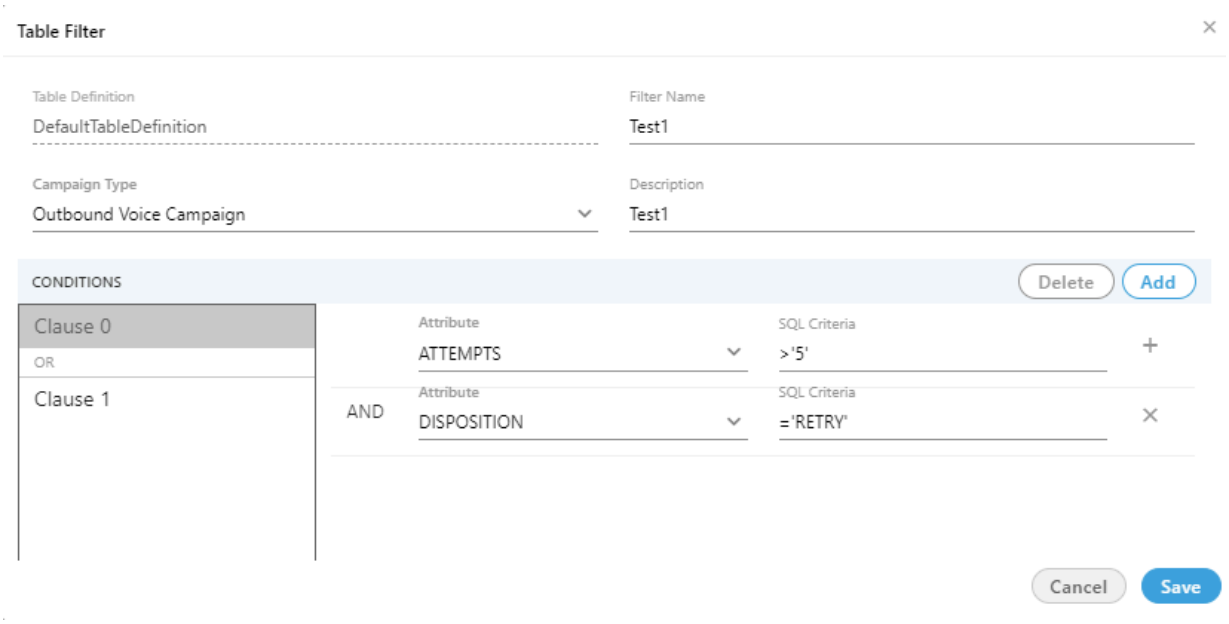


Figure: Creating Table Filter

- Click **"Save"** button to create the table filter.
  Alternatively, you can click **"Cancel"** button to not create the table filter.

You can create the multiple table filters.

Enable or Disable a Filter

Perform the following steps.

1. Select a table filter in the list.

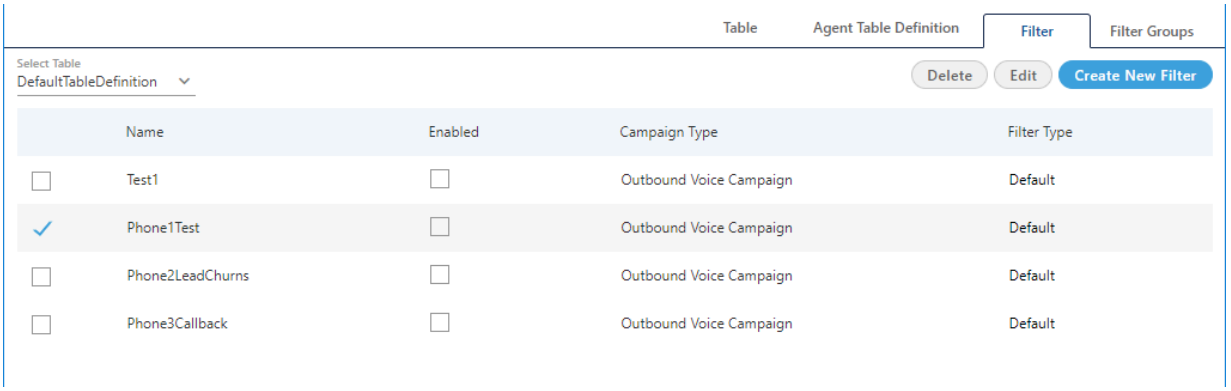


Figure: Select a Table Filter

2. Check the box titled "Enable" to enable the table filter.
3. Alternatively, you can keep "Enable" box unchecked to keep the table filter disabled.

Modify a Table Filter

Perform the following steps.

1. Select a table filter in the list.

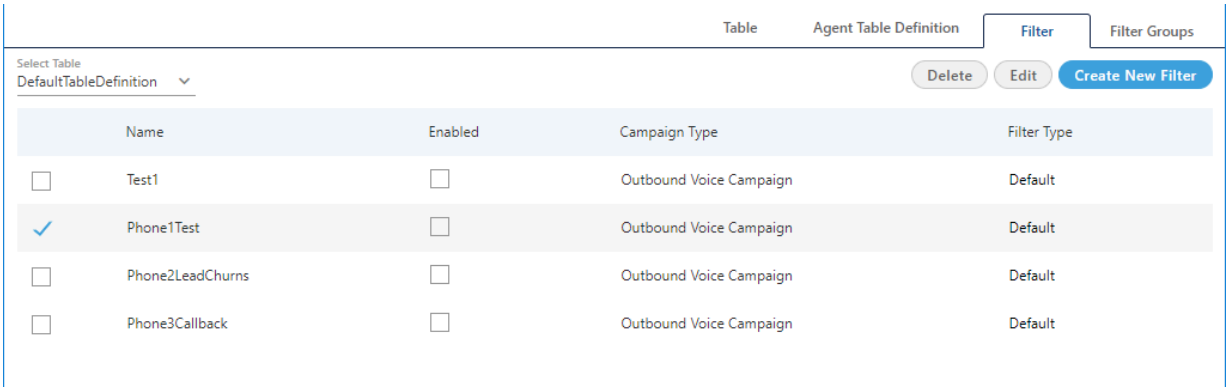


Figure: Select a Table Filter

2. Click "Edit" button on top right corner to edit the table filter. It shows the following pop-up.

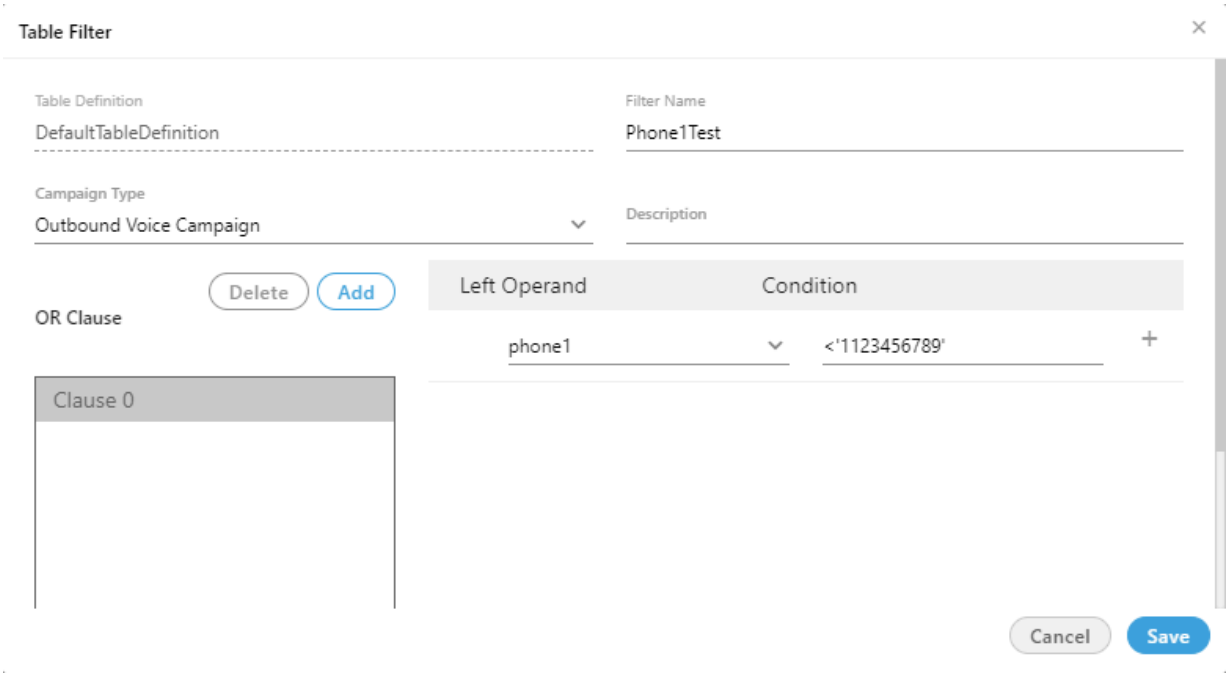


Figure: Modify a Table Filter

3. You can change the following items here.
    1. Filter Name
    2. Campaign Type
    3. Description
    4. Left Operand

5. Value
6. Clause

4. Click "Save" to save the modified table filter.

Delete a Table Filter

> A deleted table filter cannot be restored. If the table filter is being used in any campaign to filter the leads, then the filtration will not work after deleting the table filter.

Perform the following steps.

1. Select a table filter in the list.

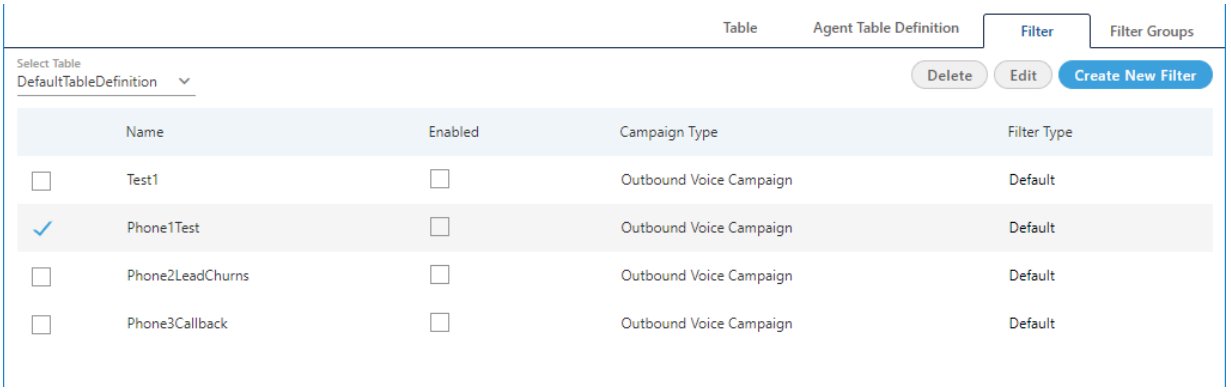


Figure: Select a Table Filter

2. Click "Delete" button on top right corner to edit the table filter. It shows the following warning message



Figure: Warning before deleting a Table Filter

3. Click "Yes" to delete the table filter.

19.1.3.4.5. Filter Groups

Overview

Filter groups (also called **table filter groups**) let you **bundle several existing table filters** into **named, ordered sets** so **outbound-style** campaigns can dial leads in **priority tiers**—for example “high-value” leads first, then a broader pool—instead of applying only a single flat filter set.

The capability is **licensable**. It applies to **Outbound Voice**, **Parallel Predictive Voice**, and **Voice Blast** campaigns. Groups can be built at **system** level (Administrator) and/or **campaign** level (Supervisor), then **assigned** on the campaign **Customers** tab under the **Filter Group** sub-tab.

How It Works

End-to-end journey

1. **Table and filters exist.** An Administrator defines the **customer table** and individual **table filters** (conditions on customer fields) under **System Settings** → **Table** → **Filters** (or equivalent in your edition).
2. **Build filter groups.** Either:
    - the **Administrator** creates **system** filter groups under **System Settings** → **Table** → **Filter Groups**, or
    - the **Supervisor** creates **campaign** filter groups under **Manage** → **Lead Management** → **Manage Filter Groups** on a supported campaign.
3. **Assign groups to the campaign.** On **Manage** → **Campaigns** → [campaign] → **Customers** → **Filter Group** tab, move the desired groups from **Available** to **Assigned**, then **Apply**. System groups appear alongside campaign groups; supervisors **cannot delete** system-created groups.
4. **Optional: fetch order inside a group (licensable).** On **Manage Filter Groups**, the Supervisor can attach up to **five fetch order policies** per filter group so that, within each tier, the dialer also orders leads (for example by upload time or attempts). When used

here, these policies **override** fetch order configured at **Administrator** campaign level for that filter-group setup (the UI explains this on the information icon).

5. **Operate and verify.** Use **Check impact** / **Check dialable numbers** (and **Enabled only** vs **All** where shown) to see **filtered** and **dialable** counts after changes. After toggling groups on or off, refresh dialable counts as prompted.

Mutual exclusion: filters vs filter groups

For a given campaign you use **either** the **Filter** tab **or** the **Filter Group** tab on **Customers**, **not both**. When the **filter group** license is active, the **Manage Filters** path for that flow is typically **hidden or unavailable**—plan training so supervisors know which mode the tenant uses.

System vs campaign groups

Origin	Created by	Type label	Notes
System Settings → **Table** → **Filter Groups**	Administrator	**System**	Can be assigned to multiple supported campaigns; only an administrator removes them at source.
Manage Filter Groups on a campaign	Supervisor	**Campaign**	Scoped to that campaign; supervisor can enable/disable, reorder, modify, or delete **their own** groups; **cannot** delete system groups.

Prerequisites

- **License** for **filter groups** (and, if used, **fetch order policy** inside filter groups) on the deployment.
- Campaign type is **Outbound Voice**, **Parallel Predictive Voice**, or **Voice Blast**.
- A **table definition** is selected where groups are maintained, and **individual table filters** already exist for that context.
- For assignment: the campaign **Customers** → **Filter Group** tab is used; prerequisites for that screen are described in **Customers / Lead Filtration**.

Configuration Steps

A. Administrator – create system filter groups

1. Open **System Settings → Table → Filter Groups**.
2. Under **Select table**, pick the **table definition** whose filters you will group.

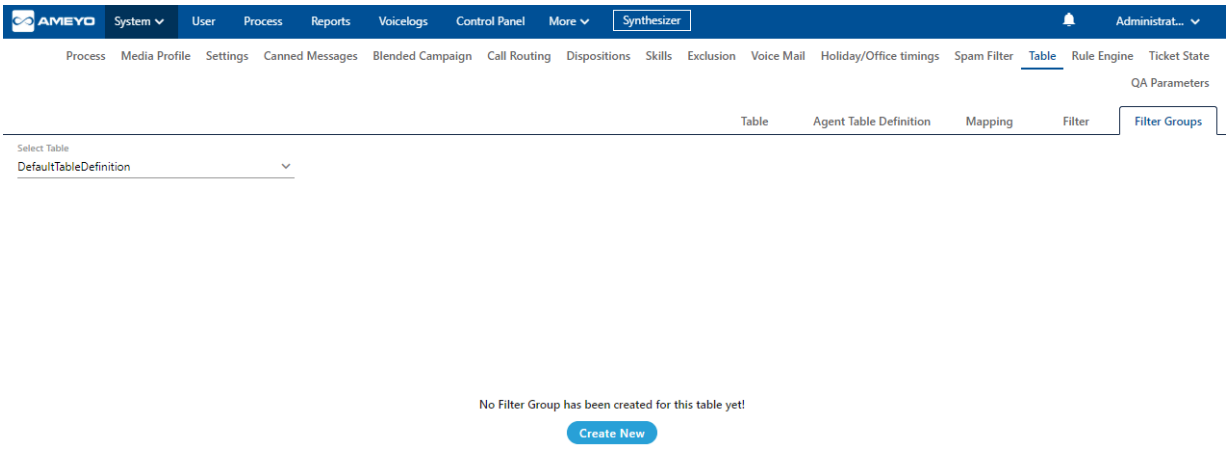


Figure: Table Filter Group

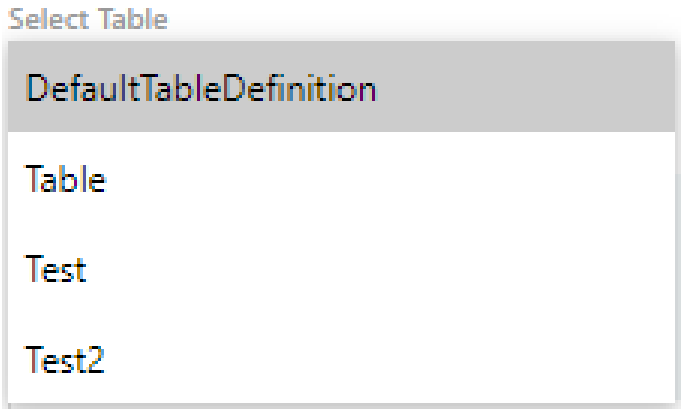


Figure: Select table definition

3. Click **Create New**. Enter a **filter group name**, choose **campaign type** (Outbound, Parallel Predictive, or Voice Blast), then move filters from **Available filters** to **Assigned filters** using the forward arrow; use the backward arrow to remove members.

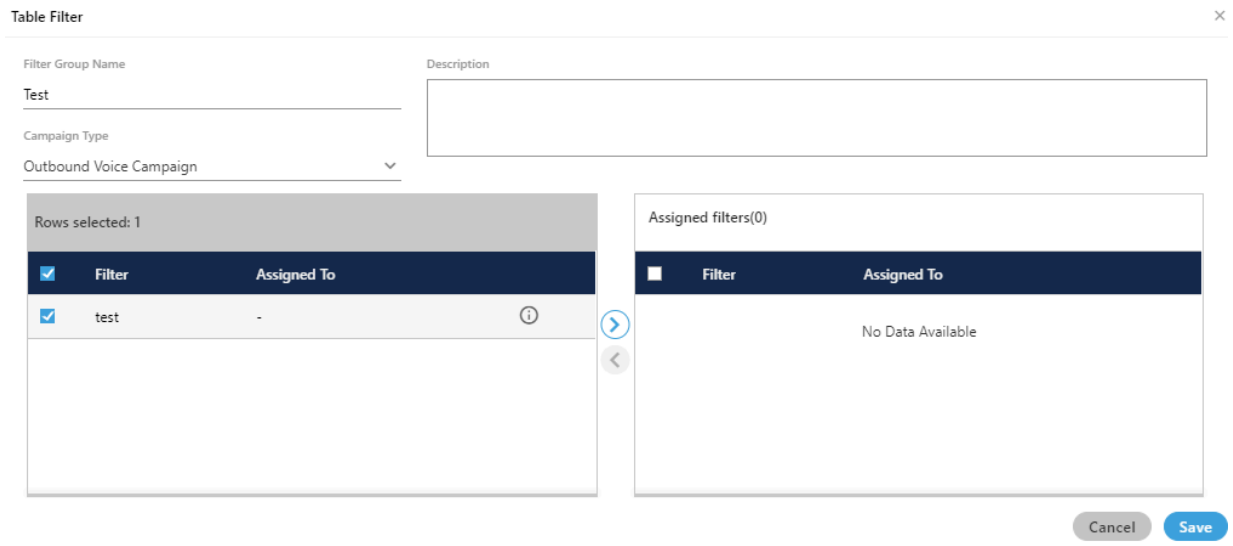


Figure: Create a filter group

> The campaign type you pick determines which filters are offered for grouping.

4. Click **Save** (or **Cancel** to discard). Enable or disable the group with the **toggle** when needed.

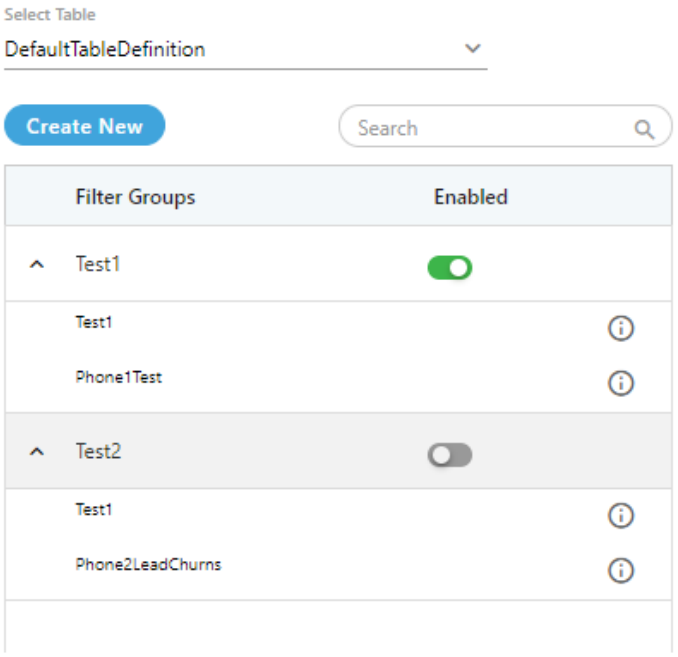


Figure: Enable or disable a filter group

5. To **edit**, select the group, click **Edit**, adjust name, description, or members, then **Save**. To **delete**, select the group, click **Delete**, confirm **Yes**. Deletion is permanent; if the group was assigned to campaigns, lead filtration for those assignments **stops working** until you reconfigure.

> A deleted filter group cannot be restored. If it was in use on campaigns, dialing logic for those assignments breaks until reassigned.

B. Supervisor — campaign filter groups and fetch order

Use **Manage** → **Campaigns** → open an **Outbound**, **Parallel Predictive**, or **Voice Blast** campaign → **Lead Management** → **Manage Filter Groups**. Create groups (**Create New**), assign filters from **Available** to **Assigned**, set **priority** with ↑ / ↓ (top group applies **first**). System groups appear as **System** type and **cannot** be deleted here.

For **fetch order** (licensable), use **+** to add policies (up to **five**). Typical policy types include:

- **Customer upload time** (ascending / descending)
- **Randomized order of lead upload**
- **Natural order of lead upload** (CSV row order)
- **Number of attempts** (ascending / descending)
- **Customer information** (sort by a chosen customer field, ascending / descending)
- **User disposition retry time** (ascending / descending)
- **Custom** (custom ordering script where your product edition exposes it)

The same logical filter group can use **different** fetch-order stacks when reused across campaigns.

Use **Check impact** / **Check dialable numbers** to refresh **filtered** and **dialable** counts after toggles; use **Enabled only** or **All** tabs in the modal where your build shows them.

Step-by-step screenshots for the supervisor console live under **Manage Filter Groups (Licensable)** in this documentation set.

C. Assign filter groups on the campaign

1. **Manage** → **Campaigns** → select the campaign → **Customers** → **Filter Group** tab.
2. Move groups from **Available** to **Assigned**, then **Apply**.
3. Do **not** use the **Filter** tab on the same campaign while filter groups are the active mode.

See **Customers / Lead Filtration** for the combined **Customers** tab narrative (filters vs filter groups, **Check impact**).

Configuration parameters

Exact **machine keys** for filter-group limits vary by release and hosting; use the table below for **what to configure** and confirm storage keys with your platform administrator if you automate configuration.

Key / parameter	Description	How to configure	Constraints & options	Sample
(UI) Filter group license	Turns on filter-group features and related UI.	**License / entitlement** for the contact center (Administrator or Exotel onboarding—not a single campaign toggle).	Without license, filter-group tabs and **Manage Filter Groups** may be absent.	Enabled for outbound sales tenant
(UI) Campaign type on system filter group	Limits which filters appear when building a **system** group.	**System Settings** → **Table** → **Filter Groups** → **Create New** → **Campaign type**	**Outbound Voice**, **Parallel Predictive Voice**, or **Voice Blast**	Outbound Voice
(UI) Filter group members	Ordered set of table filters inside one group.	System or **Manage Filter Groups** editor → **Available filters** → forward arrow → **Assigned filters**	At least one filter per group when you intend the group to narrow leads	“Tier 1 – hot leads” contains filters A + B
(UI) Group priority	Dialing order across multiple groups on a campaign.	**Manage Filter Groups** → ↑ / ↓	Top group runs first	“Hot” above “Nurture”
(UI) Fetch order policies per group	Secondary ordering inside a group after filters match.	**Manage Filter Groups** → add policies with **+** (licensable)	Up to **five** policies per group in product docs; order matters	Upload time descending, then attempts ascending
(UI) Max filter groups per campaign	Caps how many groups can be assigned.	Documented as **backend / deployment** tunable; default often **10** in guides—confirm for your build.	**UI-only (key not verified)** – ask administrator for your limit	10 groups assigned

Use cases

- **Tiered dialing:** Dial “eligible + high score” leads first, then fall back to a wider segment when the first tier is exhausted.
- **Regional or product campaigns:** Separate groups by geography or product line while reusing the same base table.
- **Operational fairness:** Combine **fetch order** (for example random or natural CSV order) with tiered filters to balance business priority and even lead treatment.

Benefits

- **Clear prioritization** of segments instead of one monolithic filter.
- **Reuse** of system-defined groups across many campaigns.
- **Supervisor control** over campaign-local groups and ordering without redefining base table filters.
- **Optional fine ordering** inside each tier when fetch-order policies are licensed and configured.

Limitations

- **Filters vs filter groups** are **mutually exclusive** per campaign **Customers** configuration.
- **Supervisors** cannot remove **system** filter groups at campaign level.
- **Deletion** of a system group is destructive and breaks assignments until you fix campaign settings.
- **Fetch order** inside filter groups **overrides** administrator **campaign-level** fetch order for that filter-group configuration—communicate this to avoid surprises.
- Maximum **five** fetch-order policies per filter group and a **default** cap on assigned groups per campaign (often **10**) are described in product guides; your deployment may differ—validate with support.

Related topics

- **Manage Filter Groups (Licensable)** – Supervisor-console walkthrough, fetch-order screenshots, **Check impact**, delete.
- **Customers / Lead Filtration** – **Customers** tab: assigning filters vs filter groups, **Apply**, **Check impact**.
- **Lead Management** – Broader lead and filter context.
- **Customer Records Management** – How table definitions and filters relate to agent-visible data.

19.1.3.5. QA Parameters in System Configuration (Licensable)

The administrator can define various quality parameters to assist analysts and other authorized users in rating the quality of each customer interaction with agents. This feature requires a license; for more information, please contact the Ameyo support team.

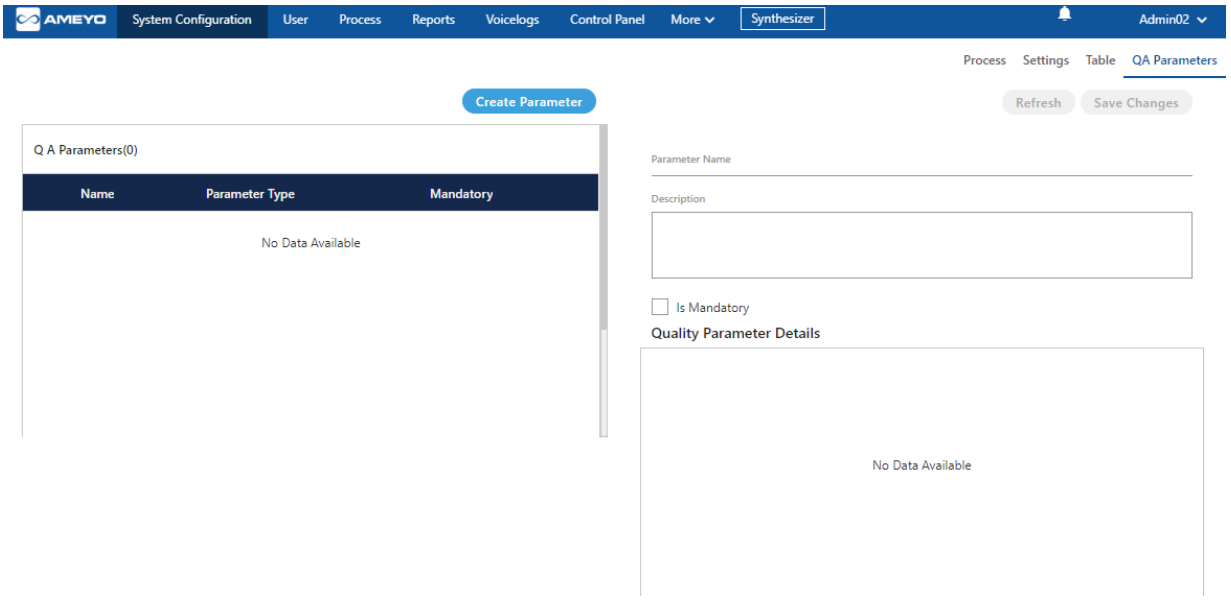


Figure: Quality Parameter Tab

Create Quality Parameter

Administrator can create new parameter by performing the following steps.

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

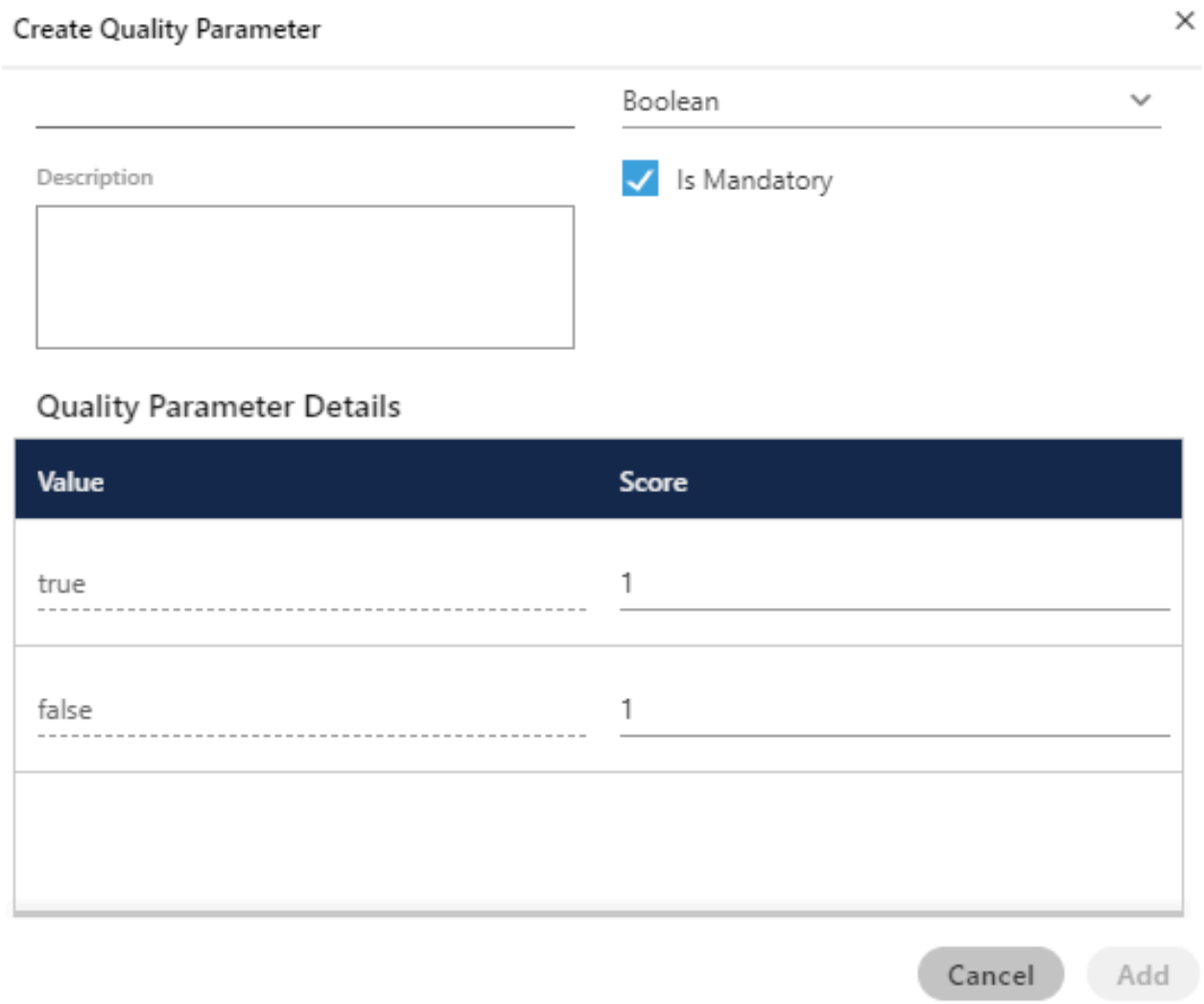


Figure: Create Quality Parameter

2. **Parameter Name:** Enter the name of parameter.
3. **Description:** Enter the description of parameter.
4. **Is Mandatory:** Check the check box if this parameter has to be made mandatory, which means the Analyst or Supervisor has to rate the call.
5. **Parameter Type:** Select the parameter type from the drop-down menu. After selecting a value, the interface gets changed. It contains the following options.
    - ***Boolean:*** Select it to create a boolean-based Quality Parameter, whose value can be given in True or False. After selecting the boolean, provide the values for true and false.
    - ***Multiple:*** Select it to create a Quality Parameter, which can contain multiple vaules.

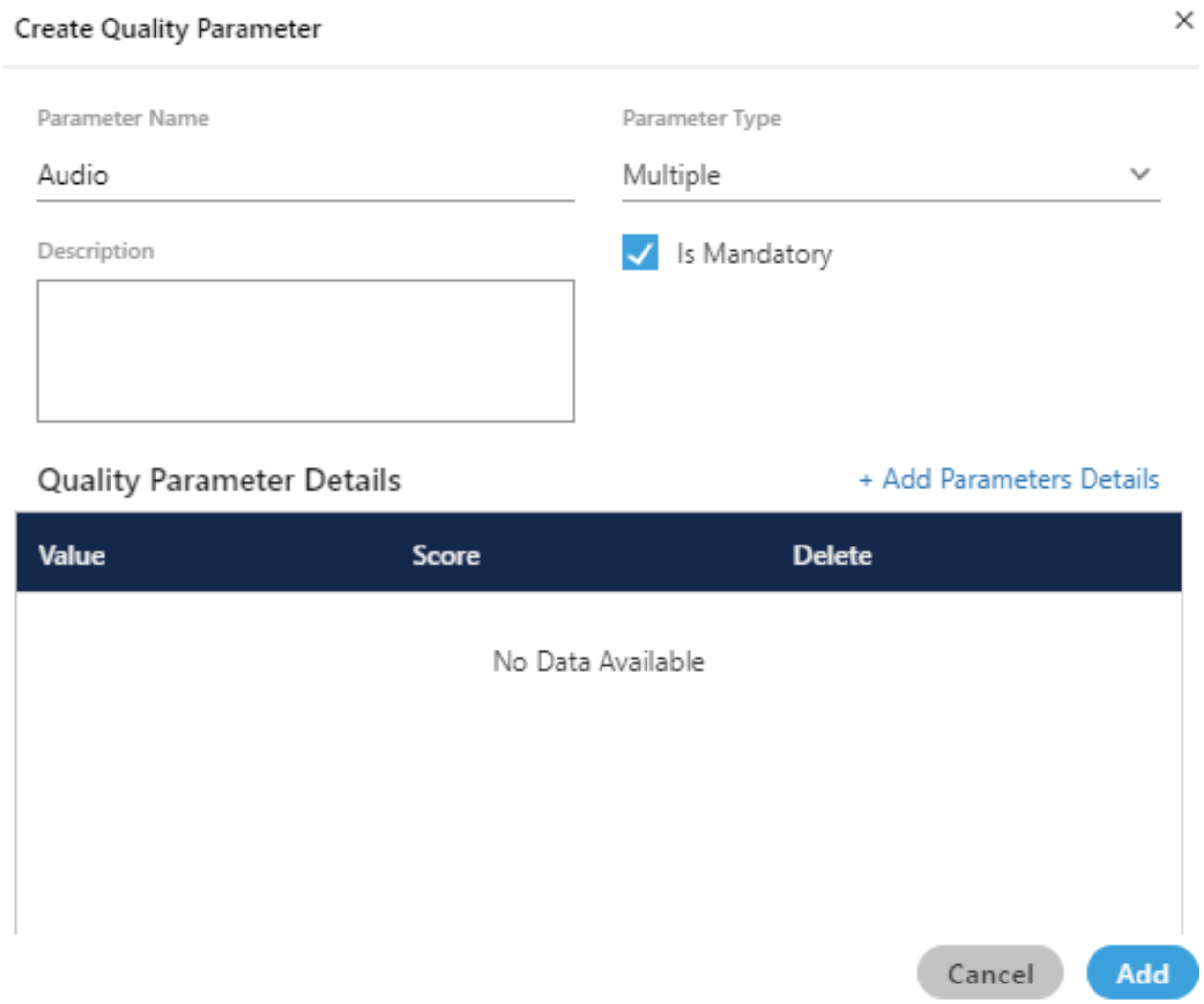


Figure: Multiple-based Quality Parameter

Perform the following steps.

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

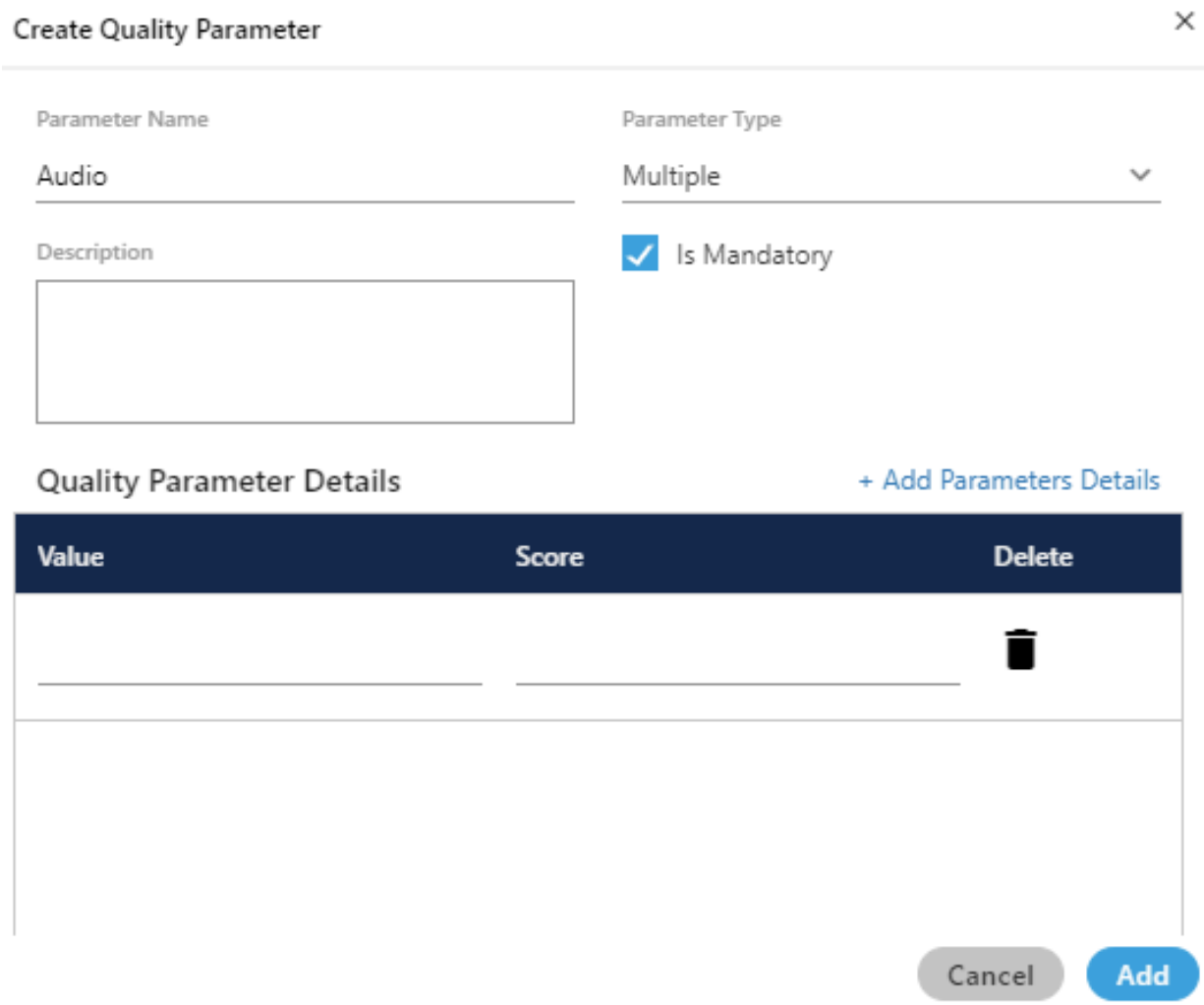


Figure: Add Details of Multiple-based Quality Parameter

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

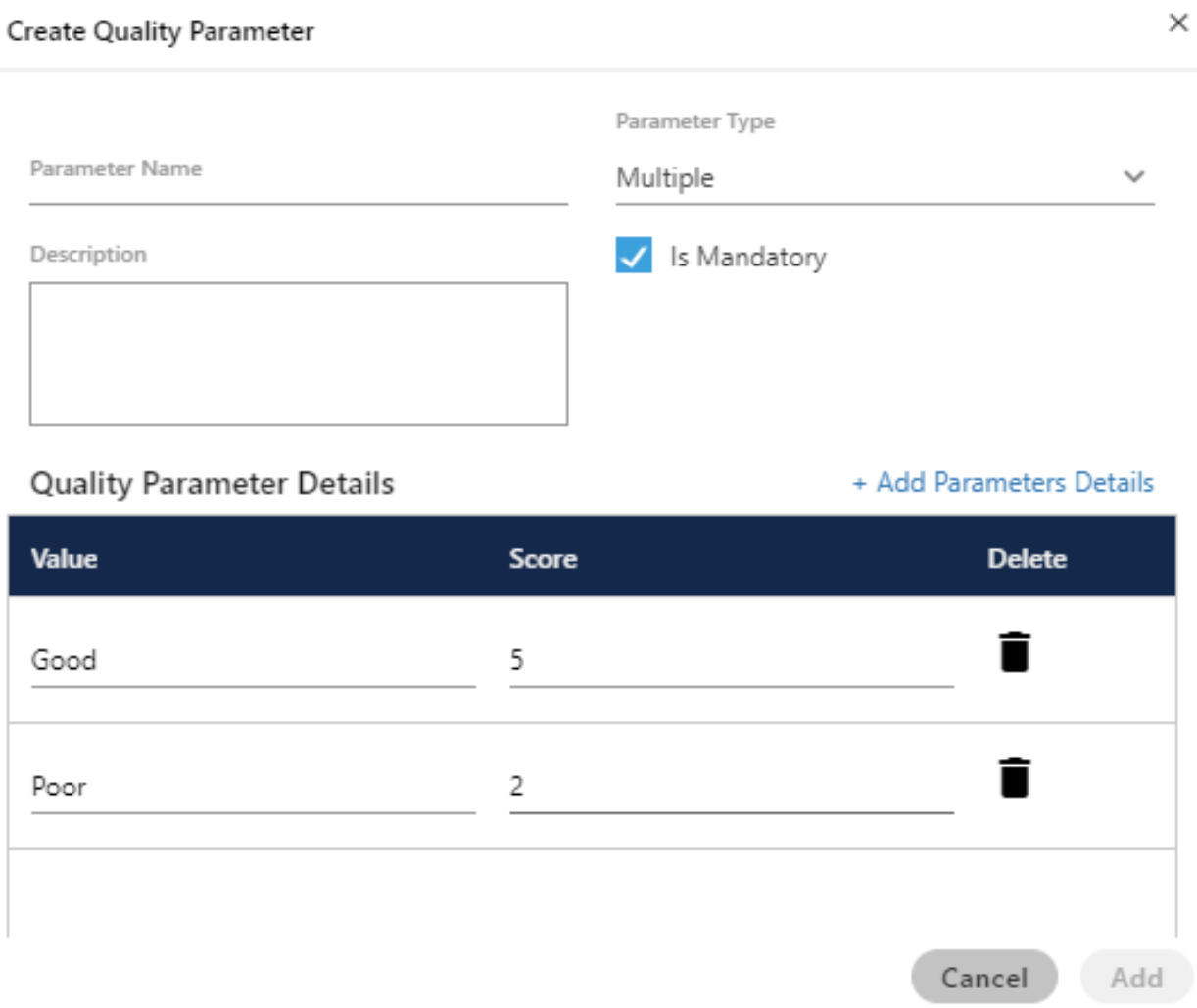


Figure: Multiple Values in a Quality Parameter

- Click on delete icon to detele a parameter detail.

3. ***Comment:*** Select it to create a Quality Parameter, which can accept and store comments about the quality of customer communication.

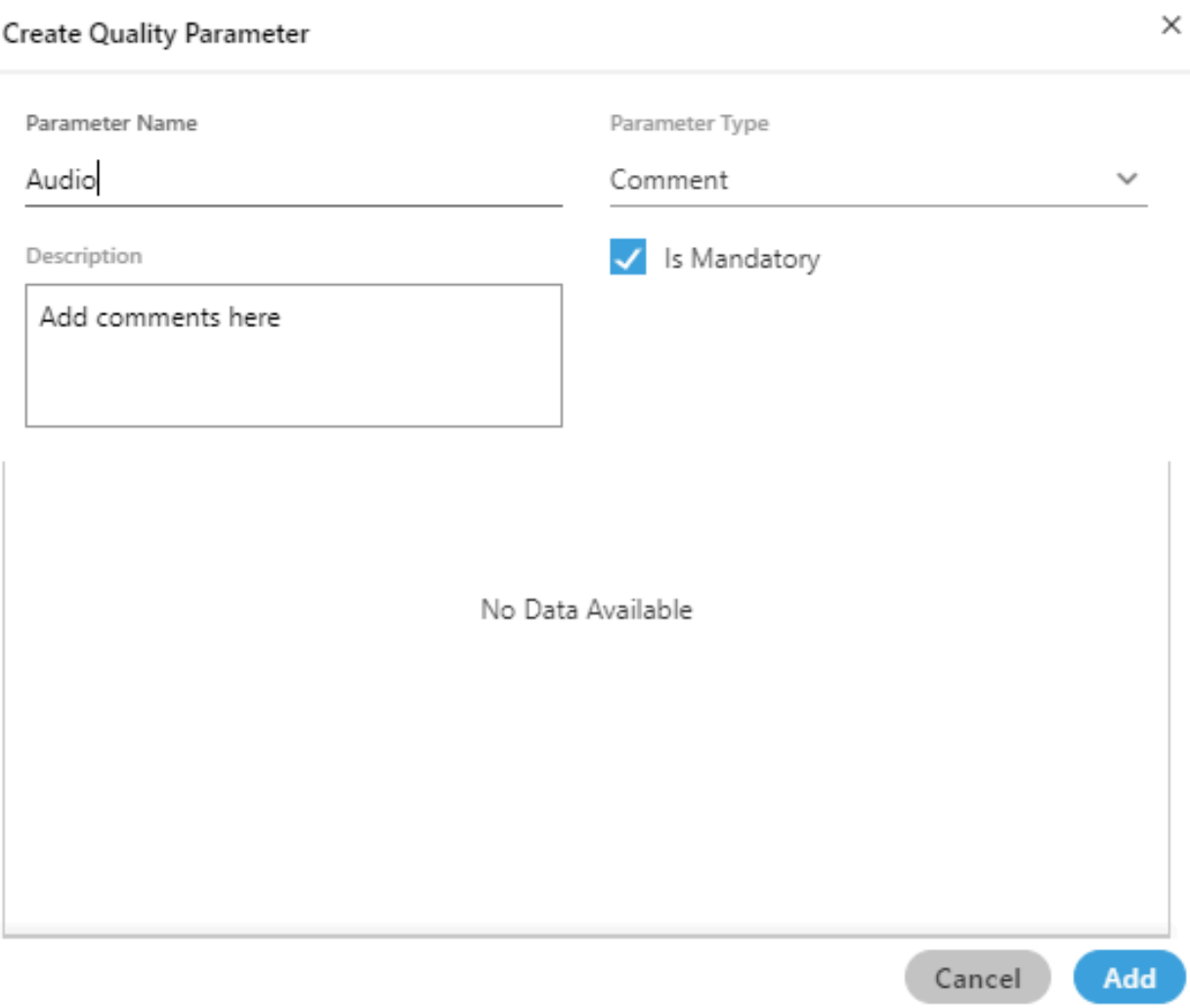


Figure: Comment-based Quality Parameter

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

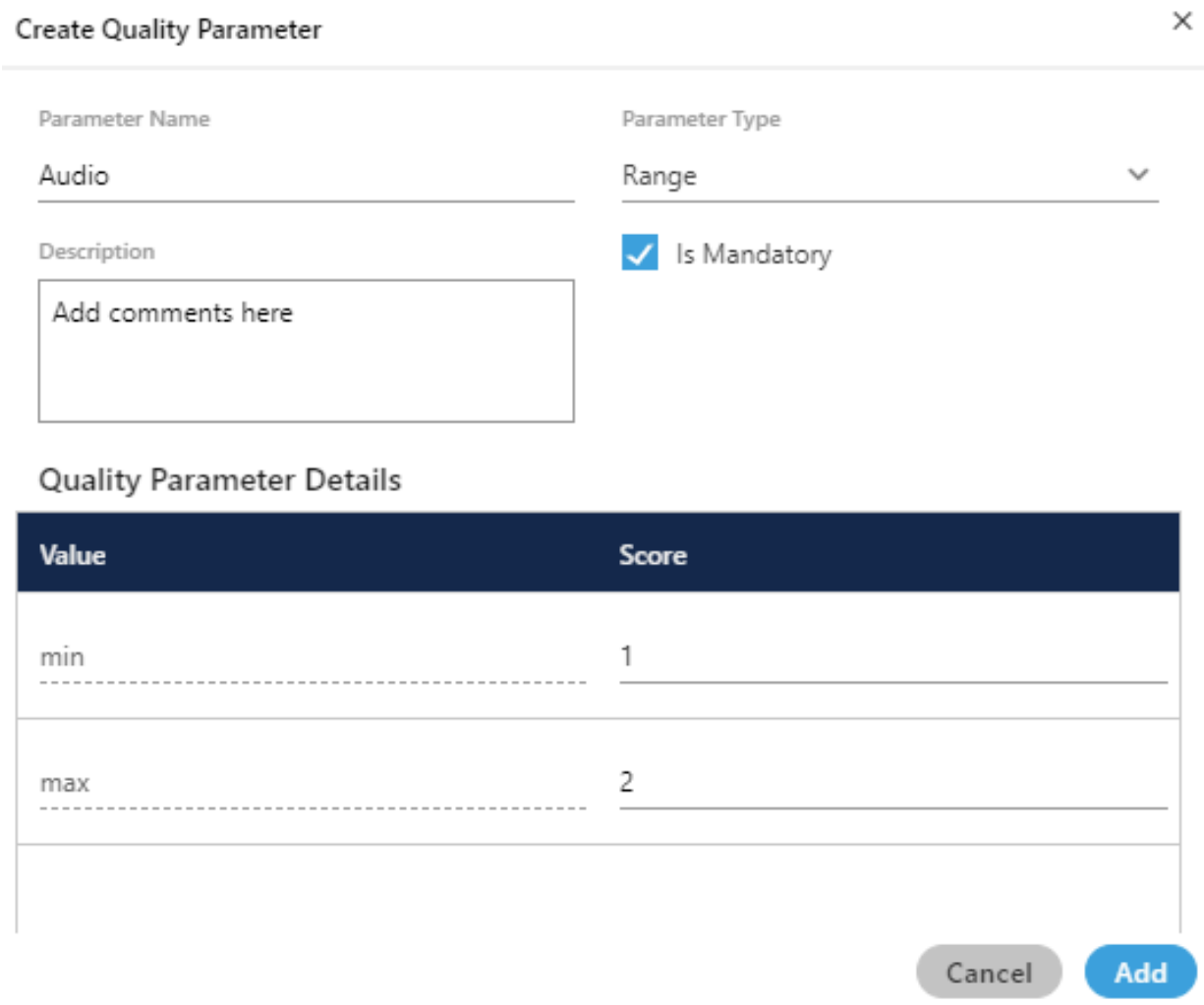


Figure: Range-based Quality Parameter

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

Following screenshot shows newly created quality parameters.

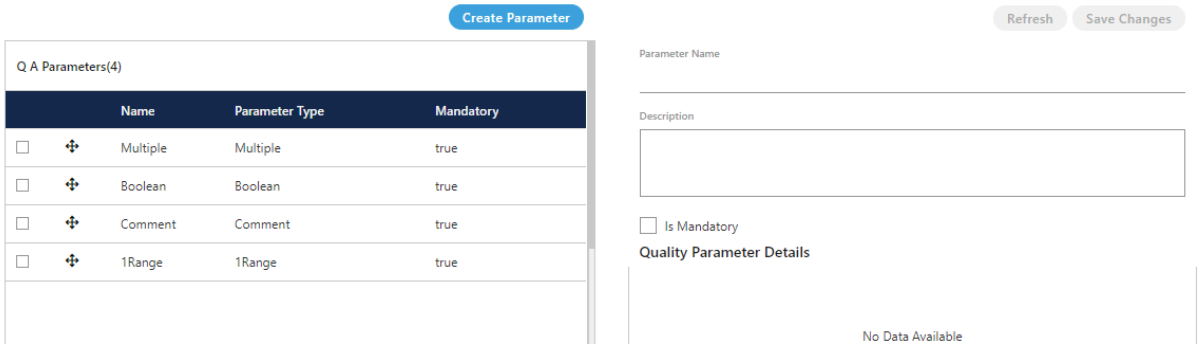


Figure: List of QA Parameter

7. Select the QA Parameters to view its details.

Change Priority of Quality Parameters

Each Quality Parameter in the list includes controls for adjusting its priority. The administrator can click the ↑ arrow to increase the priority of a Quality Parameter or the ↓ arrow to decrease its priority.

Modify Quality Parameter

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

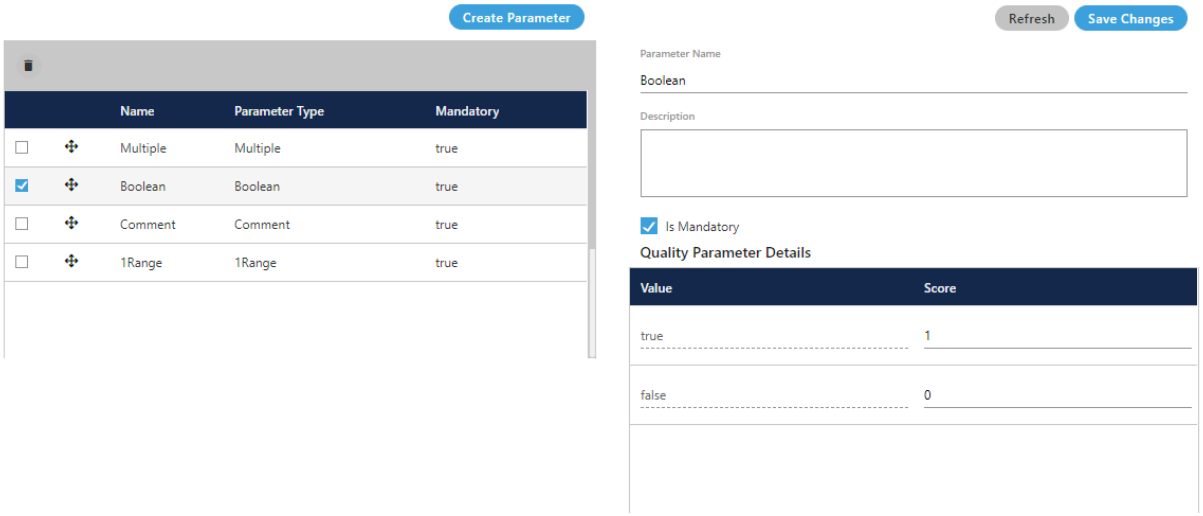


Figure: Modify QA Parameter

You can modify the following details.

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

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

Delete Quality Parameter

Perform the following steps to delete a quality parameter.

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

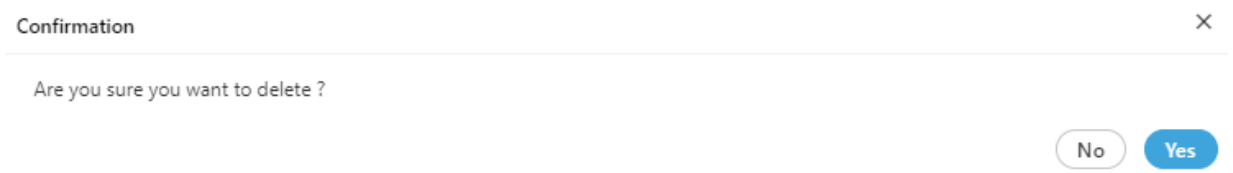


Figure: Delete QA Parameter

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

> The deleted Quality Parameter cannot be restored.

Prerequisites & Privileges

- The **Quality Scoring / QA Parameters** feature is licensable. If the **QA Parameters** tab is not visible under Administrator, request the feature to be enabled by the Exotel support team.
- To create, modify, or delete a parameter the signed-in user needs `contactcenter:dacx-cc.admin.qa-mgmt.add-cc-qa-param:invoke-access`, `modify-cc-qa-param:invoke-access`, or `remove-cc-qa-param:invoke-access` respectively. Viewing requires `view-cc-qa-param:invoke-access`.
- By default these privileges are held by the **Administrator** role; **Analyst**, **Group Manager**, and **Supervisor** have view-only access.

Parameter type cheat-sheet

Parameter Type	Use when	Stored value	Score model
`Boolean`	A question has exactly two outcomes (e.g. *Did the agent greet the customer?*).	`true` / `false`	One score per value (true vs false).
`Multiple`	The auditor picks from a fixed list (e.g. *Poor / Average / Good*).	Selected option label	Each value has its own numeric score.
`Comment`	Free-text qualitative feedback.	Auditor comment	No numeric score, ignored in aggregate scoring.
`Range`	The auditor picks a number within a range (e.g. 1–10).	Integer in the configured range	Score = selected value (or configured weighting).

Priority ordering (↑ / ↓) controls the display order on the scorecard shown to the Supervisor / Analyst and the order of columns in QA-related reports.

Related pages

- **QA Parameters in a Campaign** – assigning saved parameters to specific campaigns.
- **Quality Scoring / QA Parameters** – auditor workflow and scoring outcomes.
- **Reporting & Analytics** – QA score reports and trend analysis.

19.1.4. App Manager (App Installer Configuration)

The App Manager (also referred to as App Installer) is the central hub within the Exotel contact center for installing, configuring, and managing apps. It provides administrators with a self-service interface to upload app packages, assign them to specific locations in the contact center UI, and control which user roles can access each app – all without requiring manual database changes or backend technical intervention.

Previously, adding or removing apps required direct database edits by the technical team, which was error-prone and created dependency on engineering resources. The App Manager eliminates this by offering a unified platform accessible from the Administrator Console.

For a catalog of available apps and their download links, visit the **App Gallery**. For background on the marketplace concept, see **Introduction to App Marketplace**.

How It Works

1. **Access App Manager** – An Administrator logs in to the Ameyo instance and navigates to **Administrator Console > System Tab > App Manager**.
2. **Download an App Package** – The administrator visits the **App Gallery** on the documentation portal, selects the desired app, reads its dedicated article for feature details and requirements, and clicks the download button to obtain the app package file.
3. **Upload the App** – Back in the App Manager interface, the administrator uploads the downloaded app file using the upload action.
4. **Configure Slot Mapping** – The administrator assigns the app to one or more **Slots** (UI locations where the app will appear), such as the Agent Toolbar or a sidebar panel. Standard slots are available by default; custom slots require a backend request.
5. **Assign Roles and Permissions** – The administrator configures which user roles (Agent, Supervisor, Administrator) can see and interact with the app.
6. **Activate the App** – Once slot mapping and permissions are set, the administrator activates the app. It becomes immediately available in the assigned UI locations for the configured roles.

7. **Manage Lifecycle** – The administrator can return to App Manager at any time to deactivate, reconfigure, or remove an installed app.

Benefits

- **Simplified App Management**: No more manual, error-prone database manipulations.
- **Self-Service Integration**: Customers can integrate their custom-built apps into Ameyo contact center independently via Admin interface.
- **Improved Stability**: Reduces technical errors stemming from manual interventions.
- **Unified UI/UX**: Consistent user experience across Exotel contact center and integrated applications.
- **Scalable and Extendable**: Supports multiple apps managed within a single platform. Check out the **App Gallery** for more information on available apps.

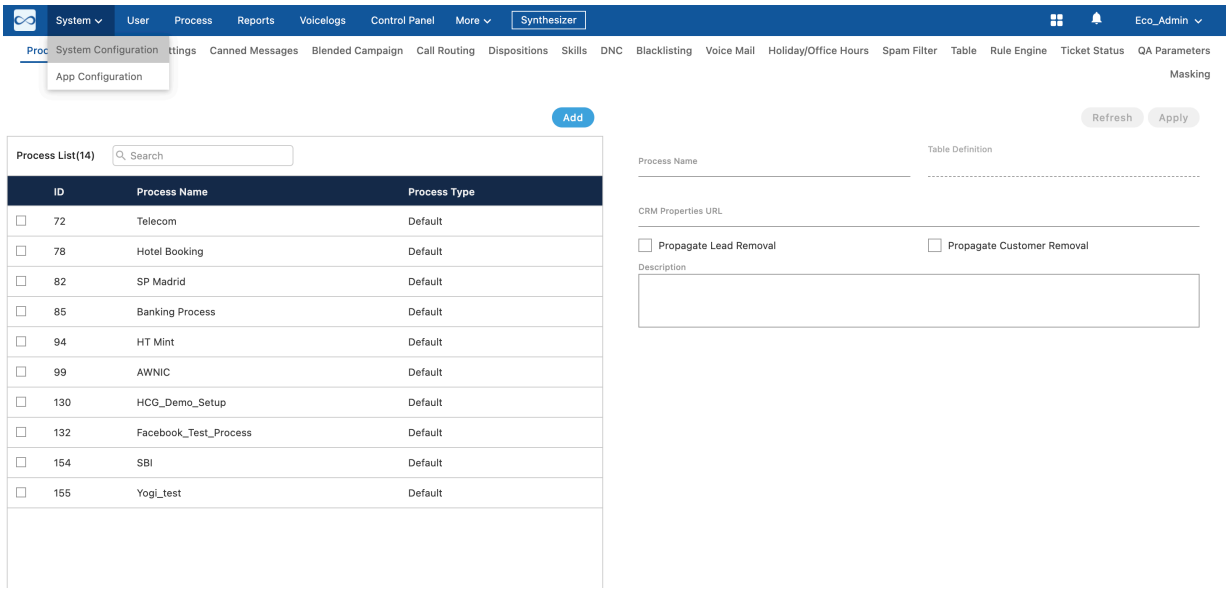
Prerequisites

- Exotel contact center system with build version supporting the App Installer.
- React and Redux framework-based apps for compatibility.
- Administrator role with access to the System Tab in the Administrator Console.

> Note: If the App Manager tab under System Tab on the Administrator interface is not available on your setup, please contact the Exotel support team or your Customer Success Manager to enable it.

Configuration Steps

1. **Log in** to your Ameyo instance as an **Administrator**.
2. Navigate to **Administrator Console > System Tab > App Manager**.



3. **Download the app package** from the **App Gallery**:
    - Browse to the App Gallery section on this portal.
    - Select the app you want to configure.
    - Go to the app's dedicated page and click the **Download** button.
4. **Upload the app file** in the App Manager interface.
5. **Map the app to a Slot** – Choose the UI location(s) where the app should appear (see Slot Mapping below).
6. **Configure role-based access** – Select which user roles (Agent, Supervisor, Administrator) should see the app.
7. **Activate the app** – The app becomes available in the assigned slot(s) for the configured roles.

Slot Mapping

The App Manager allows apps to be placed in specific "Slots" (locations) within the contact center interface. Slots determine where an app appears for end users.

- **Standard Slots:** Standard slots (like agentHeaderSlot) are available by default.
- **Custom Slots:** If you require apps to appear in specific new locations (e.g., specialized Admin tabs or Supervisor panels), new slots must be defined in the backend code.

Action Required: If you need to create new slots or modify existing roles for app visibility, please submit a request to **Exotel Support**.

For setups running 4.x apps on the 6.x Omni UI, the following slot mapping applies automatically:

- Workbench Sidebar (4.x) → Right Bar (6.x)
- TopBar Global (4.x) → Left Panel (6.x)
- Workbench Internal Tab (4.x) → Right Bar (6.x)
- Background App (4.x) → Right Panel (6.x)

Configuration parameters

Key / parameter	Description	How to configure	Constraints & options	Sample
Slot assignment	Determines the UI location where the installed app appears for end users.	**Administrator Console > System Tab > App Manager** – select the app, then choose a slot from the slot-mapping dropdown. Scope: per app.	Standard slots are available by default (e.g., `agentHeaderSlot`, Agent Toolbar, Sidebar). Custom slots require a backend request to Exotel Support.	`agentHeaderSlot`
Role / persona access	Controls which user roles can see and interact with the installed app.	**Administrator Console > System Tab > App Manager** – select the app, then assign one or more roles. Scope: per app.	Supported roles: Agent, Supervisor, Administrator. At least one role must be assigned before activation.	Agent, Supervisor
App activation status	Enables or disables the app in the contact center UI.	**Administrator Console > System Tab > App Manager** – toggle the activation status for the app. Scope: per app.	Active or Inactive. Deactivating an app removes it from the UI without uninstalling it.	Active

> The App Manager tab itself must be enabled in the backend for the Administrator Console. If it is not visible, contact Exotel Support to enable the **App Configuration** feature.

Use Cases

- **Installing a Monitoring App** – A contact center administrator wants to give agents visibility into their own performance. They download the **Agent Self Monitoring App** from the App Gallery, upload it via App Manager, assign it to the Agent Toolbar slot with the Agent role, and activate it. Agents immediately see the app in their toolbar.
- **Deploying a Notification App for Supervisors** – A supervisor team needs a broadcast tool. The administrator downloads the **Notification App**, maps it to the appropriate slot, assigns both Administrator and Supervisor roles, and activates it.
- **Managing Multiple Apps** – An organization uses several productivity apps (Bulk Operation, Agent Signature, Dial User). The administrator manages all of them from the single App Manager interface – uploading, configuring slots, and controlling activation without needing separate backend interventions for each.
- **Deactivating an App Temporarily** – During a system maintenance window, the administrator deactivates a non-critical app from App Manager. Once maintenance is complete, they reactivate it – no reinstallation required.

Limitations

- Only apps built with the **React and Redux** framework are compatible with the App Manager.
- **Custom slots** (beyond the standard set) require backend code changes and a request to Exotel Support; they cannot be created from the UI.
- The App Manager tab must be **enabled in the backend** before it appears in the Administrator Console. This is not a self-service toggle.
- For 4.x apps running on the 6.x Omni UI, only **Agent-persona apps** are supported via automatic slot mapping. Admin and Supervisor persona apps from 4.x are not in scope.
- Background apps from 4.x are not natively supported in the Omni UI and are temporarily rendered in the Right Panel as a minimal (1px × 1px) frame.

Troubleshooting and Support

- **App Manager tab not visible**: Confirm that the App Configuration feature has been enabled in the backend. Contact Exotel Support or your Customer Success Manager.
- **App not appearing after activation**: Verify that the correct slot and role are assigned. Check that the user logging in has the matching role.
- **Upload failures**: Ensure the app package is a valid React/Redux app file downloaded from the App Gallery. Check that the contact center build version supports the App Installer.
- **Slot mapping issues**: If the desired slot is not listed, it may need to be created as a custom slot – submit a request to Exotel Support.
- For any other issues, consult system logs for errors related to app activation or visibility, and contact Exotel Support with detailed error codes and log snippets for quick resolution.

19.1.5. User and Group Configuration

Overview

This module, accessed from the top navigation bar, is dedicated to managing your staff accounts, their roles, and their team structures'

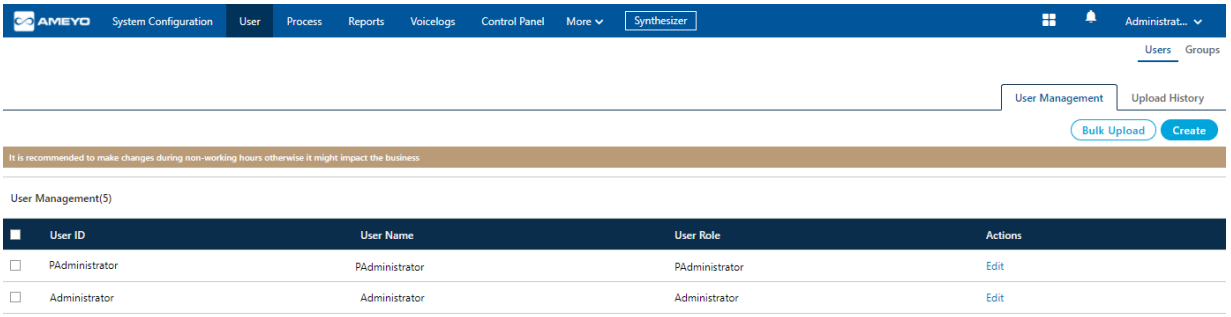


Figure: User Management

The administrator can perform the following steps from here.

1. **Users:** This tab allows the Administrator to create and manage the user accounts in Ameyo.
2. **Group Management:** This tab allows the Administrator to create and manage the user groups in Ameyo.

The Administrator can create new users and their groups from existing users of Ameyo system.

Users

The Administrator can create, edit, and delete the users from here. The administrator can also view the history of bulk upload users.

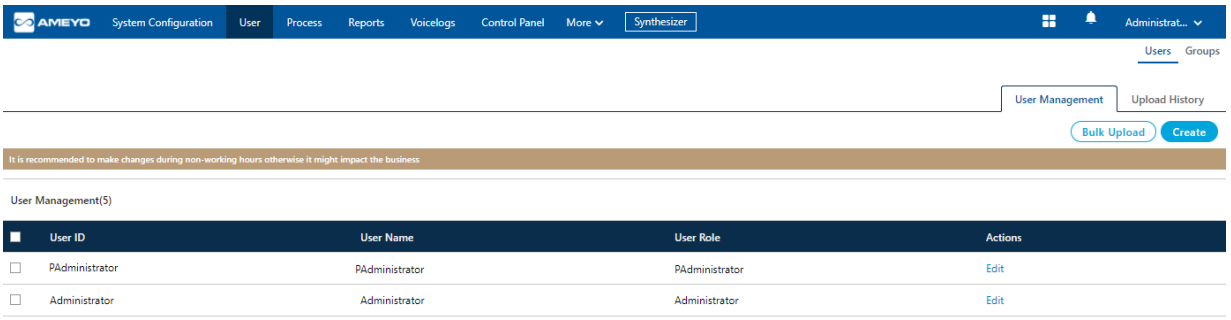


Figure: User Management

The administrator can perform the following steps from here.

1. **User Management:** This tab allows the Administrator to create and manage the user accounts in Ameyo.
2. **Upload History:** This tab allows the Administrator to view the user upload history.

User Management

The Administrator can create new users and delete the existing users from Ameyo system.

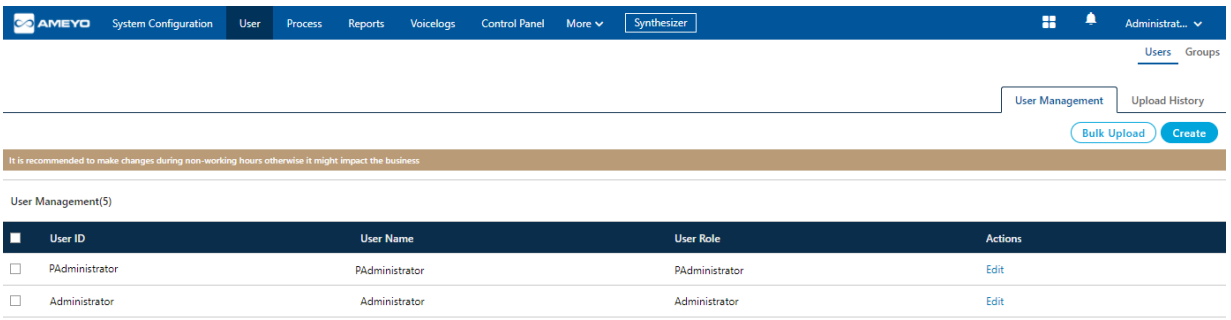


Figure: User Management

Add User

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

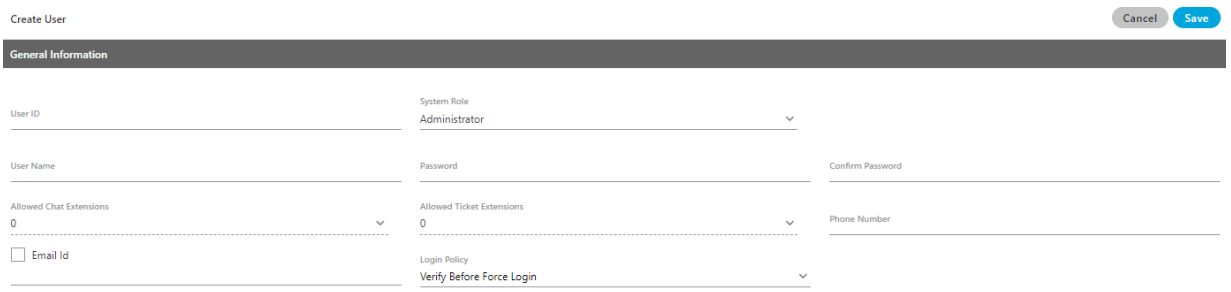


Figure: Add a User

Perform the following steps.

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

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

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

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

- **Administrator**: As the name suggests, the user with the administrator user rights is the head of all the Ameyo and is able to do everything in the system.
- **MAdmin**: MAdmin is the mini-administrator who has some privileges like the administrator but does not have the complete authorization like administrator.
- **Voice Admin**: All the voice related administration level works are allowed to be done by the voice-admin user.
- **Analyst**: The analyst is the user who analyses the complete work done by the agents.
- **Professional-Agent**: The professional agent is the user who is professional in handling multiple customers and their calls at the same time while assigned in the multiple campaigns.
- **Executive**: The executive is the person who is allowed to interact with the customer.
- **Supervisor**: The supervisor is the user who has the privileges to monitor the work of the agents which are assigned under him.
- **UAM-Maker**: The UAM-Maker (User Access Manager) user has the privileges to the create the users and assign them to their respective campaigns so that they, can work accordingly.
- **UAM-Checker**: The UAM-Checker (User Access Manager) has to approve the users created by UAM-Maker.
- **Customer Manager**: The Customer Manager is used to run the Customer Manager API.
- **Group Manager**: The combination of multiple voice agents is known as group, and the group manager monitors the activity of the agents assigned in that group.

3. Enter the password in the provided text box and confirm the password by re entering the same in "Confirm Password" text box.
4. Enter the description about the user in the provided text area.
5. Select the Allowed Interaction Extensions from the drop down field. Allowed Interaction Extension means that number of media interactions that is chat, mails, social media etc. can a Agent handle.
6. Select the number of Ticket Extensions which a user can handle at a time.
7. To enable E-mail ID for user check the checkbox provided and enter the E-mail ID of the user in the textbox.

8. **Phone Number:** The administrator can provide the phone number of the agent here.
9. **Login Policy:** Select the Login policy from the provided drop down box.
10. Click "Save" to add the user.
11. Click "Cancel" to discard the changes.

Modify User

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

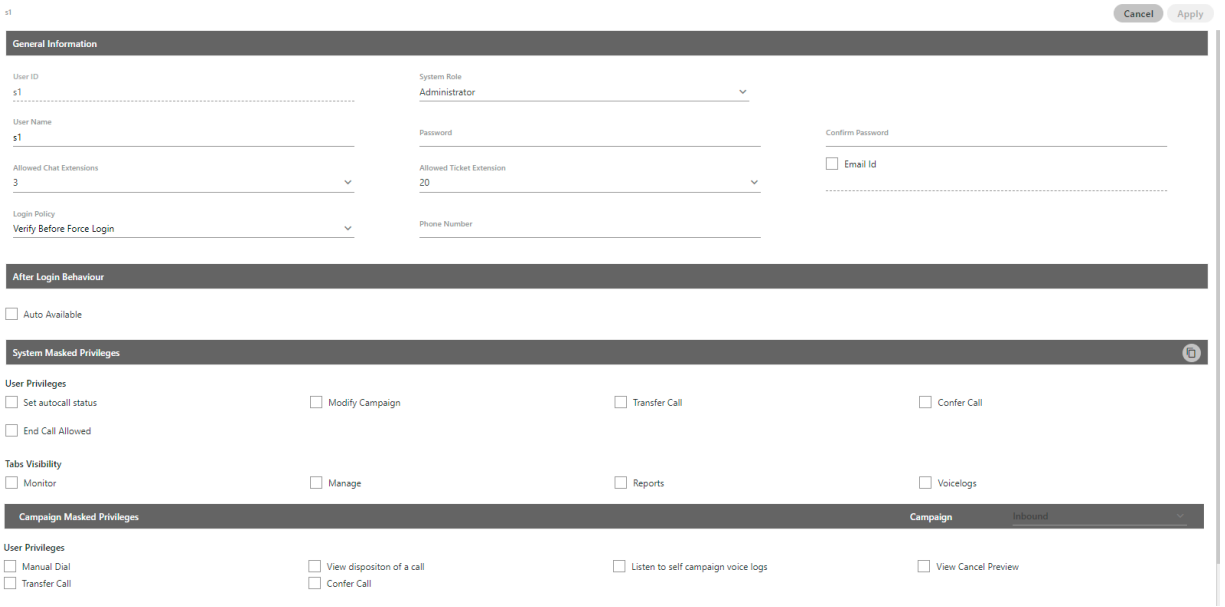


Figure: Modify a User

Following information can be modified.

1. **General Information:** Under this category, the following fields can be modified.
    1. System Role
    2. User Name
    3. Password
    4. Allowed Chat Extensions
    5. Allowed Ticket Extensions
    6. Check or uncheck "Email ID" field

7. Add, modify, or delete Email Address
8. Phone number of the user
9. Change Login Policy

2. **After Login Behaviour:** Here, you can check "Auto Available" to make the user auto-available after the login. Keep it uncheck to not make it auto-available after the agent login.
3. **System Masked Privileges:** The administrator can restrict the user from some actions related with system. Enable the checkboxes to restrict the user from the following restrictions.
    - **Set autocall status:** It restricts the user to change the status of the auto call. It means that the user is not able to change the status of the auto call, the status set either by supervisor or administrator remains available.
    - **Modify Campaign:** It restricts the user to change the campaign after login to another campaign. It means that the user is not able to change the campaign even if the user is assigned in multiple campaigns. Now, if the user selects the campaign at the time of login remains available only. The option to change campaign for the user from the main menu remains disabled.
    - **Transfer Call:** It restricts the user to transfer the call.
    - **Confer Call:** It restricts the user to confer the call.
    - **End Call Allowed:** It restricts the user to end the call.
4. **Tabs Visibility:** The administrator can mask the tab visibility of the supervisor. Enable the checkboxes to restrict the user from the following restrictions.

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

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

available campaigns in which user is assigned. Following privileges can be restricted for any user:

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

If the "Confer Call" privilege has been masked for a Supervisor, then the "Call Conference" for that Supervisor will also be masked in "Live Monitoring" Tab.

It is a Campaign-level Privilege, which can be configured here. The change made by a Supervisor for this privilege will override the privilege configured by the Administrator.

If a user is assigned in multiple campaigns and administrator wants to mask the user from multiple campaigns, then you have to mask the user from all the campaigns one by one.

These features are available for all other users except administrator.

6. **Voice Mail Configurations (Licensable):** This feature is licensed. This tab will be only visible if voicemail license is procured at the center.
   The Administrator can enable Voicemail feature at system level is enabled by sliding the

"voicemail" bar towards right. If this is not enabled, then voicemails will not be recorded. To enable sending the voicemails notifications, administrator needs to check the "Notification Email IDs" checkbox.

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

7. Click "Apply" button to save the changes.
   Rather, click "Cancel" to discard the changes.

Delete User

Perform the following steps to delete the user.

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

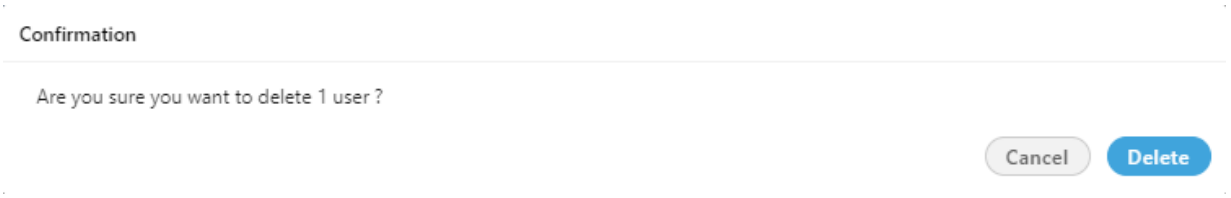


Figure: Warning before deleting a User

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

> When a new user is created in the system, the default state is NEW.
>
> - User can login to the system and work in the campaigns, user's state will remain as NEW.
> - Admin user can change the password of the user, user's state will remain as NEW.

When the password is changed by the user itself, the state will be changed to ACTIVE.

- Once the state is active, it indicates that user(agent) has changed the password.

User Card

After the creation of the user, the user card is displayed while hovering the mouse on the user name of the user. Following screen is displayed while hovering the mouse over the username of the user. The user card contains the user-role, username, and userID.



Figure: User Card

Bulk Upload

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

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

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

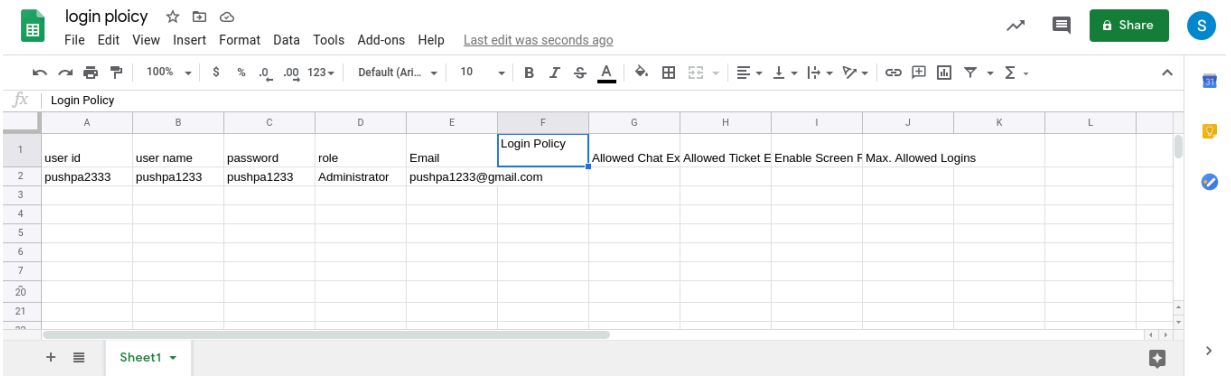


Figure: CSV File

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

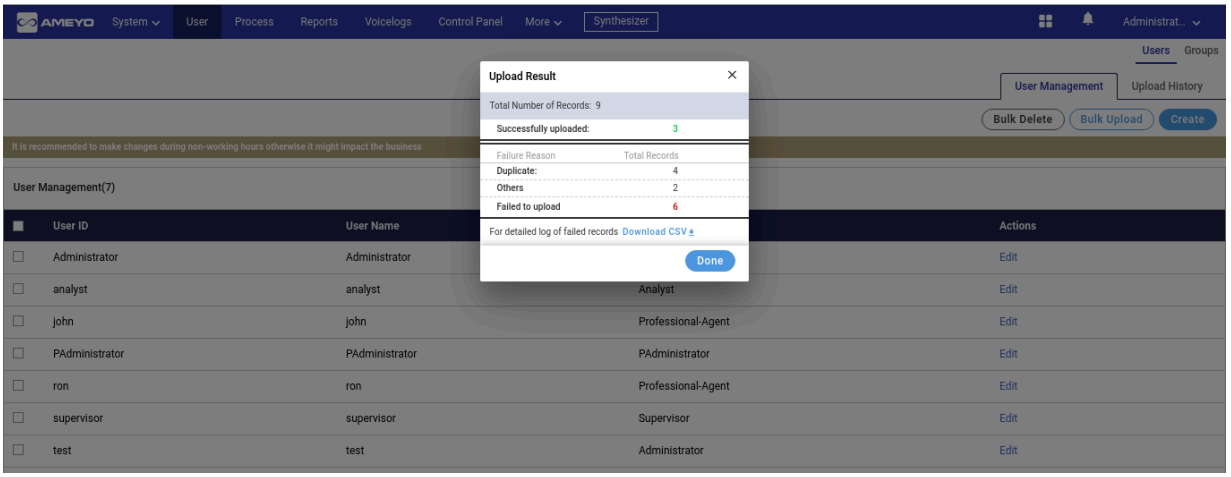


Figure: Modal shown for Bulk Upload of Users

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

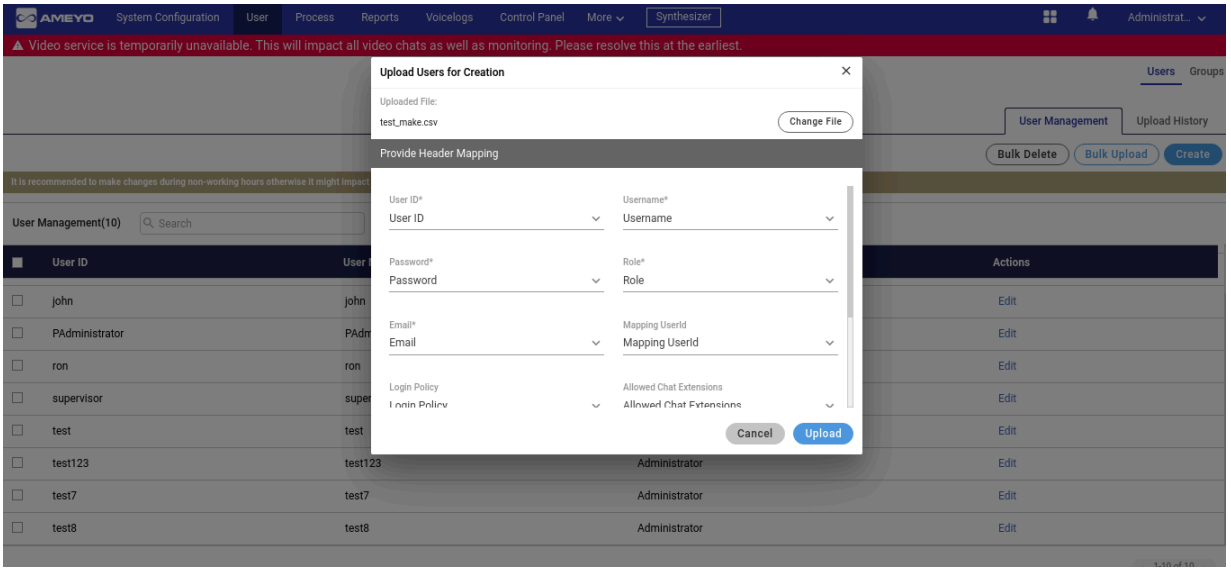


Figure: Mapping of User fields

6. After the user creation step, the administrator can view the upload history of the users from the upload history tab.

Upload History

Once the upload process completes, the administrator can view the upload history and status of users from the "Upload History" tab. This tab displays all upload sessions along with any errors encountered. It shows the total number of records uploaded via CSV, the count of failed records, and the current status of the file. Additionally, it indicates how many records remain to be uploaded. The administrator can also download a CSV file containing the failed records. The "Exported Date" and "Last Exported" columns display the filename and the timestamp when the failed CSV file was last downloaded.

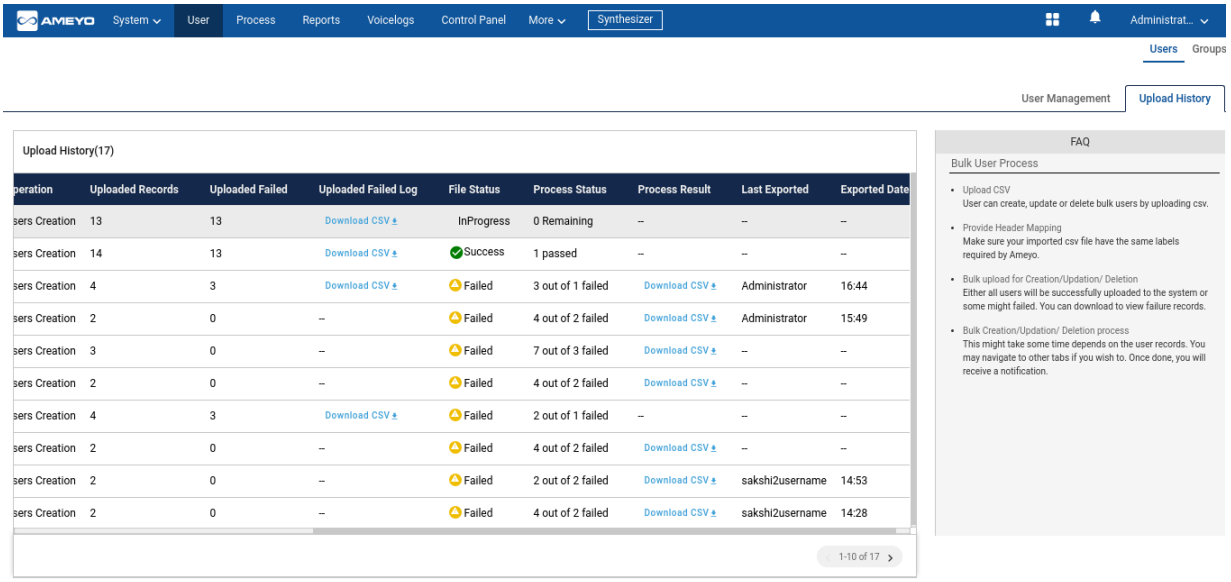


Figure: Upload History Tab

Group Management

The administrator can create new user groups within the Ameyo system. This group management feature enables the administrator to organize agents into groups, allowing designated "Group Managers" to effectively manage and supervise their assigned members.

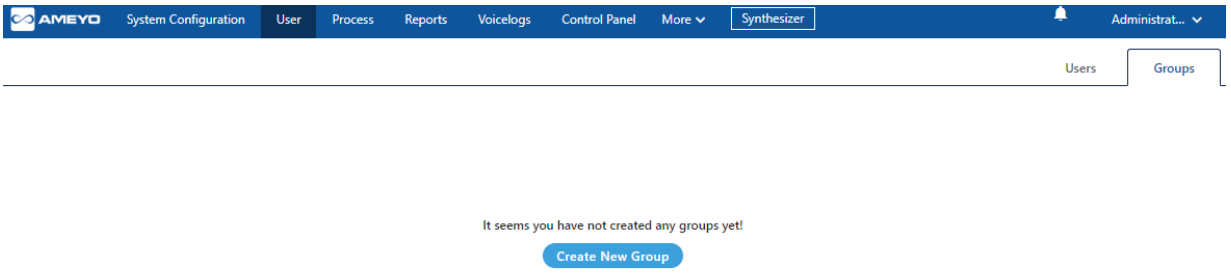


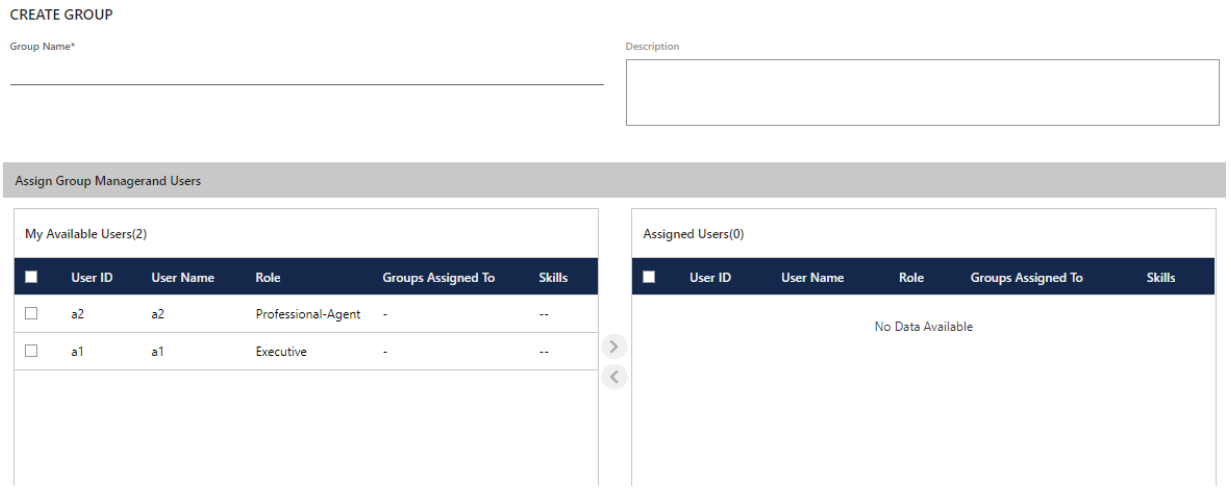
Figure: Group Management

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

Create New Group

> Before creating any group manager, the administrator has to create a user with the user role "Group Manager".

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



- Perform the following steps to create the group.

1. Provide the name of the group in the "Group Name" column.

2. Enter the description of the group, if any, in the "Description" textbox.
3. Choose the agent from the "Available Users" column that you want to assign to the group, then click the forward arrow icon to complete the assignment.

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

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

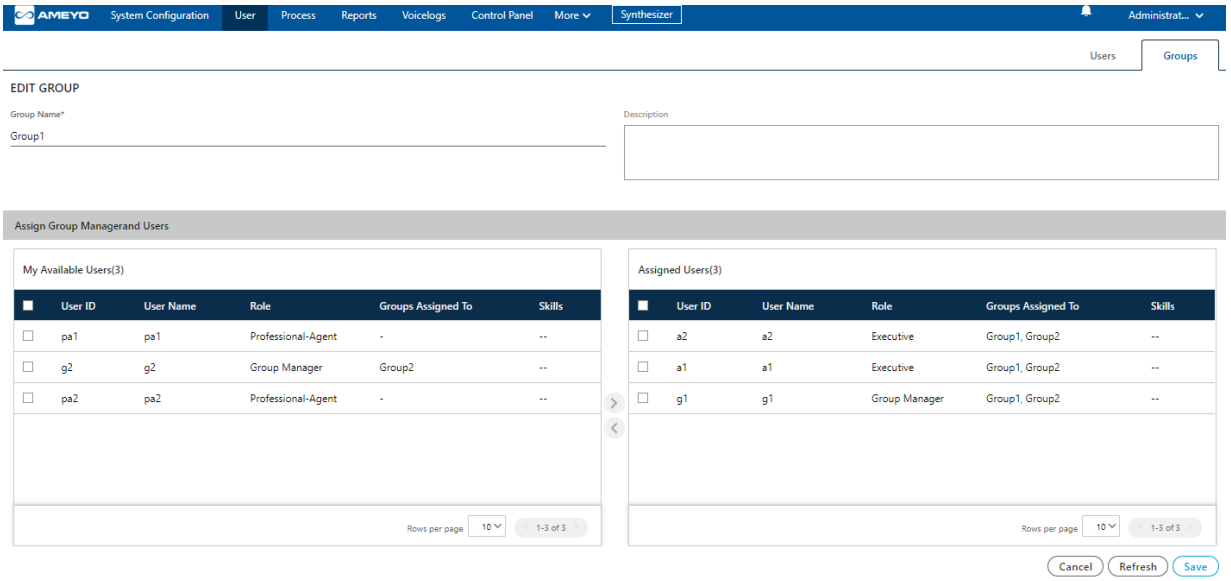


Figure: Sample Group

> User assignment operates in an atomic manner, meaning it is not transactional. If some users among the selected group cannot be assigned due to reasons such as configuration issues, the assignment will proceed for the eligible users, excluding those who failed to be assigned. Additionally, users without the necessary licenses will not be displayed in the list of available users for assignment.

Edit the Group

Perform the following steps to edit the group.

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

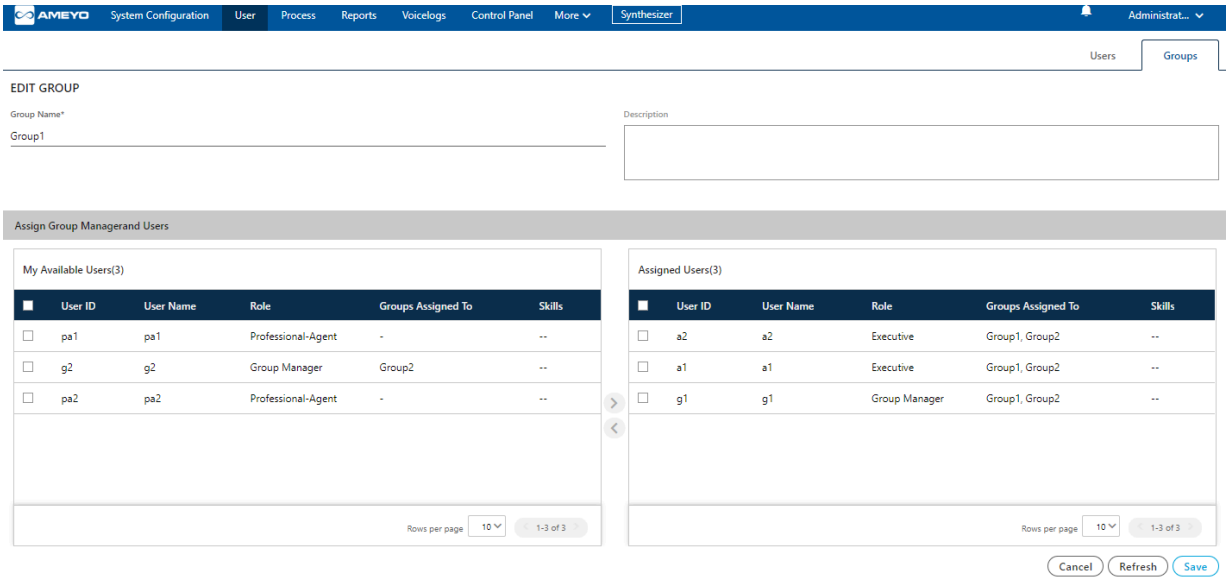


Figure: Edit the Group

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

Delete Group

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

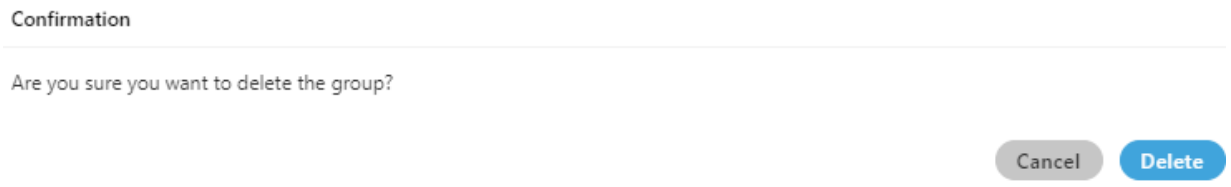


Figure: Delete Group

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

Assign Group Manager or Agents in Multiple Groups

A Group Manager or agent can be assigned to multiple groups. The Administrator has the ability to create multiple groups and assign a Group Manager to each. This allows a Group Manager to oversee several groups, which may include different or overlapping sets of agents.

It is recommended to avoid assigning the same agents to multiple groups, as this can complicate management for the Group Manager. However, if some agents from one group need to be included in another group managed by the same Group Manager, ensure that both groups have several distinct agents to help the Group Manager differentiate between them.

For example, if the Administrator changes a user's group from "G2" to "G19," the user must log out and log back in for the changes to take effect and display correctly in the Administrator Console. Previously, the group change was visible to the Administrator even if the user had not re-logged in. This issue has now been resolved so that group changes appear to the Administrator only after the user has logged out and logged back in.

19.1.6. Process Configuration

Overview

This tab is used for creating, managing, and deleting campaigns under a **process**. It includes the following sections and tabs to facilitate these functions.

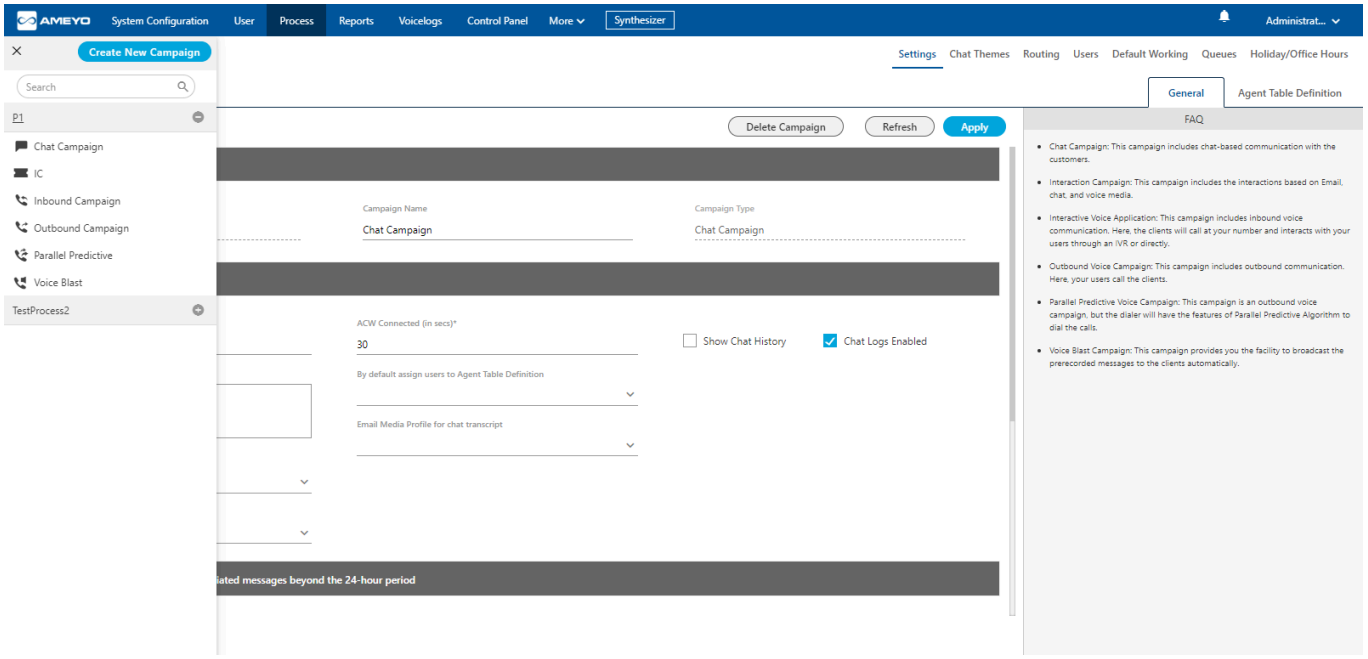


Figure: Process Tab

The User Interface of this tab varies based on the campaign type selected in the left-side menu. It can be divided into several parts:

- **Left Navigation Section:**
  This fixed left sidebar allows browsing through various processes and campaigns. If the sidebar is hidden, click the icon to open it; if visible, click "X" to close it. The pane includes a "Create New Campaign" button to start new campaigns and a search box to find specific processes or campaigns.
- **Tabs:**
  By default, these tabs appear when you first visit the page, though their visibility and settings depend on the selected campaign type:Details of these tabs are covered in the Campaign Settings documentation.
  - Settings
  - Routing

- Users
- Call Context
- Default Working
- Queues
- Canned Message
- Holiday/Office Hours
- Customers
- Local IVR
- Custom Fields
- State
- Rule
- Media Profile
- Customer Card
- QA Parameters
- Prompt

Operations:
Operations here are categorized as:

1. **Process Management:**
   Click any process name in the left navigation to configure its settings. If no campaign exists, Process Settings won't appear; create a campaign first before accessing these settings.
2. **Campaign Management:**
   The administrator can create, edit, and delete campaigns, which are essential for setting up the Contact Center.

   - [ ] Create Campaign,
   - [ ] Process Tab Interface for Different Campaigns,
   - [ ] Delete a Campaign

This organizes campaign creation and management effectively with process-specific configuration and operational tools.

Process Settings

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

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

1. **Chat Theme**
2. **Custom Fields**
3. **Customer Distribution Rules**
4. **PACE State**
5. **PACE Rule**
6. **Customer Card**

19.1.6.1. Chat Theme Tab in Process Settings

The Chat Theme tab in Process Settings enables you to create customized themes for the Web Chat. Configuration is performed via various APIs, which are provided by default within Ameyo Server 4.3 and above. By using the parameters available in this tab, you can call any API to execute its specific function.

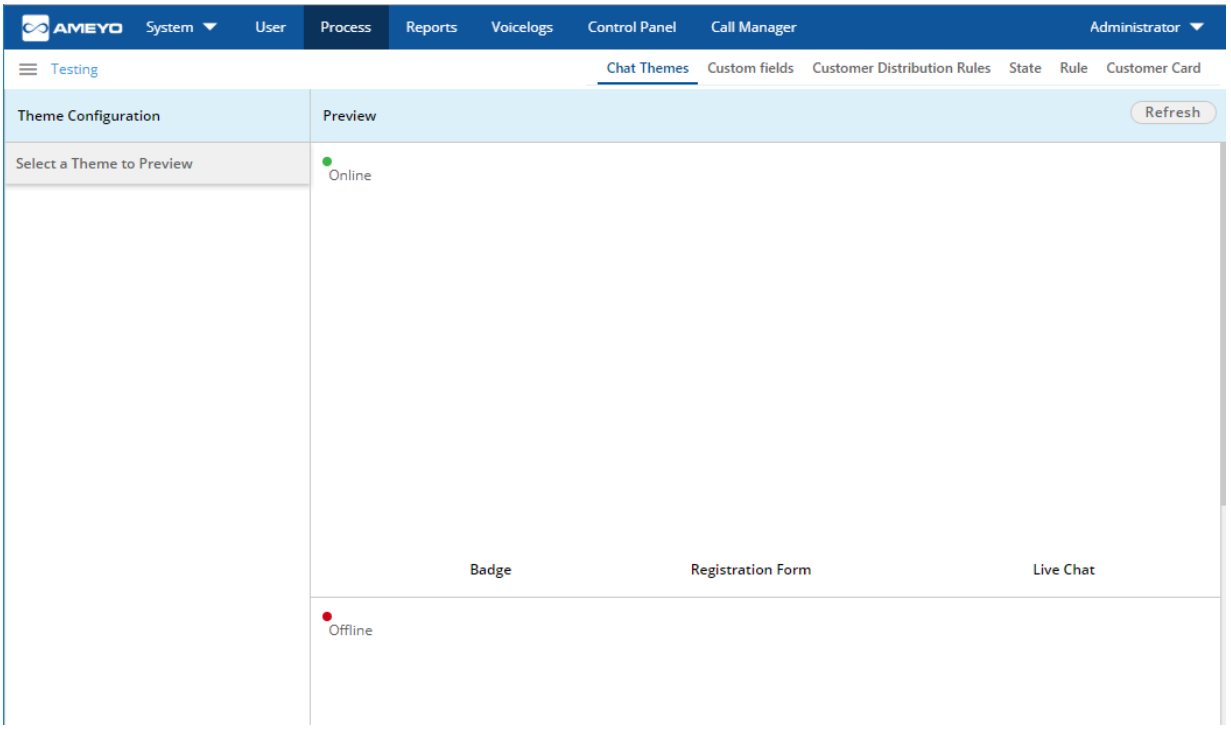


Figure: Chat Themes Tab

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

Parameters

The Parameters section outlines the hierarchy and values needed to execute theme operations via APIs. The hierarchy is structured as follows: **Theme Configuration → Component → Property → Value.**

- **DEFAULT_REGISTRATION_FORM:** It is the registration form to start the chat. It has the following components.

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

- **DEFAULT_OFFLINE_REGISTRATION_FORM:** It is the default offline registration form that appears when the chat is offline. It has the following components.
  - **HEADER:** It lets you modify the header in the form.

        - TEXT: It lets you modify the text in the header. It accepts the value in text format.
        - COLOR: It lets you modify the color of the header in the form. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
        - TEXT_COLOR: It lets you modify the color of text in the header in the form. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
    - **INPUT_FIELD:** It lets you modify the formatting of the input field in the form.
        - TEXT_COLOR: It lets you modify the color of the text in the Input Field in the form. It accepts the value in RGBA(<number>,<number>,<number>, <number>).
    - **BUTTON:** It lets you modify the formatting of the button in the form.
        - COLOR: It lets you modify the color of the button in the form. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
        - TEXT_COLOR: It lets you modify the color of the text in the button in the form. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
        - SHAPE: It lets you modify the shape of the button. It accepts the value as cornered or rounded.
    - **SUCCESS_MESSAGE:** It lets you modify the formatting of the success message.
        - COLOR: It lets you modify the color of the text in the success message. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
    - **ERROR_MESSAGE:** It lets you modify the error message.
        - COLOR: It lets you modify the color of the text in the error message. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
    - **BACKGROUND:** It lets you modify the background in the form.
        - COLOR: It lets you modify the color of the background in the form. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
    - **PLACEHOLDER:** It lets you modify the text that is displayed over the input field as an introduction to the offline registration form.
        - TEXT: It lets you modify the placeholder text in the form. It accepts the value in plain text.
        - TEXT_COLOR: It lets you modify the color of the placeholder text in the form. It accepts the value in RGBA(<number>,<number>,<number>,<number>).

- **CHAT_SCREEN:** It is the main chat screen. It has the following components.
  - **BACKGROUND:** It lets you modify the background of the chat screen.
    - COLOR: It lets you modify the color of the background in the chat screen. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
  - **SYSTEM_MESSAGE:** It lets you modify the formatting of the system message.
    - COLOR: It lets you modify the color of the text in the system message. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
  - **CUSTOMER_MESSAGE:** It lets you modify the formatting of the customer message.
    - BACKGROUND_COLOR: It lets you modify the background color of the text in the customer message.
    - COLOR: It lets you modify the color of the text in the customer message. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
  - **AGENT_MESSAGE:** It lets you modify the formatting of the agent message.
    - BACKGROUND_COLOR: It lets you modify the background color of the text in the agent message. It accepts the value in RGBA(<number>,<number>, <number>,<number>).
    - COLOR: It lets you modify the color of the text in the agent message. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
  - **TIMESTAMP:** It lets you modify the formatting of the timestamp (given below the messages) in the chat screen.
    - COLOR: It lets you modify the color of the timestamp. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
  - **FOOTER:** It lets you modify the formatting of the footer.
    - COLOR: It lets you modify the color of the footer. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
  - **HEADER:** It lets you modify the header in the chat screen.
    - COLOR: It lets you modify the color of the header in the chat screen. It accepts the value in RGBA(<number>,<number>,<number>,<number>).
    - TEXT_COLOR: It lets you modify the color of the text in the header in the chat screen.

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

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

All color values accept the RGBA format for precise control over appearance. This detailed parameter structure allows thorough customization of the Ameyo Web Chat theme to create engaging customer interactions.

Get Session ID of Administrator Login Session

It is requierd to provide the session ID of the current Administrator's login while using the APIs. Get the access to the server operating system where Ameyo Server is installed and execute the following commands to get the same.

```
psql -U postgres
```

```
\c ameyodb
```

```
select * from user_session_history where logout_time is NULL;
```

Replace ameyodb with the Ameyo Database of your Ameyo Server Installation.

> The Session ID of the Administrator changes with every new login. So, you have to execute the above command every time whenever the Administrator logins.

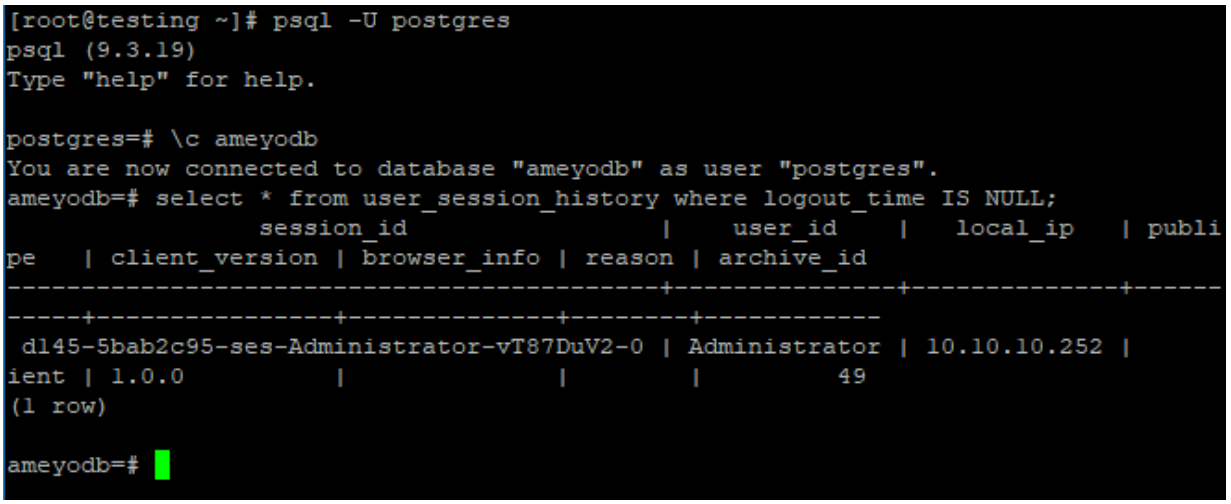


Figure: Get Session ID of Administrator's Current Login Session

Chat Theme APIs

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

1. Add Theme
2. Add Property to Theme
3. Update Theme

4. Apply Theme
5. Remove Property from a Configuration of a Theme
6. Get All Themes
7. Get Theme Configuration
8. Remove a Theme

Add Theme API

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

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

```
<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/dacx/jsonCommand?
command=remote.processor.webchatThemeConfigurationService.addWebchatThemeConf
iguration&data={sessionId:<SESSION_ID>,themeName:<NAME_OF_THEME>,isEnabled:
<boolean>,webchatThemeConfigurationProperties:
[{chatScreen:CHAT_SCREEN,component:<COMPONENT_NAME>,property:
<PROPERTY_NAME>,value:<VALUE>}]}
```

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<SESSION_ID>	Session ID of the Administrator's current login session, which you have obtained through the command given above.
<NAME_OF_THEME>	Here, you have to provide a name for this new theme. It should be provided in text format.
<boolean>	true OR false
<COMPONENT_NAME>	Provide a name for the component, of which formatting you want to modify.
<PROPERTY_NAME>	Provide a name for the property of the already provided component, of which formatting you want to modify.
<VALUE>	Provide a value for the already provided property. Common property value formats are given below. • **COLOR or TEXT_COLOR:** 'RGBA(<number>,<number>, <number>,<number>)' • **TEXT:** Text format • **SHAPE:** cornered or rounded.

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

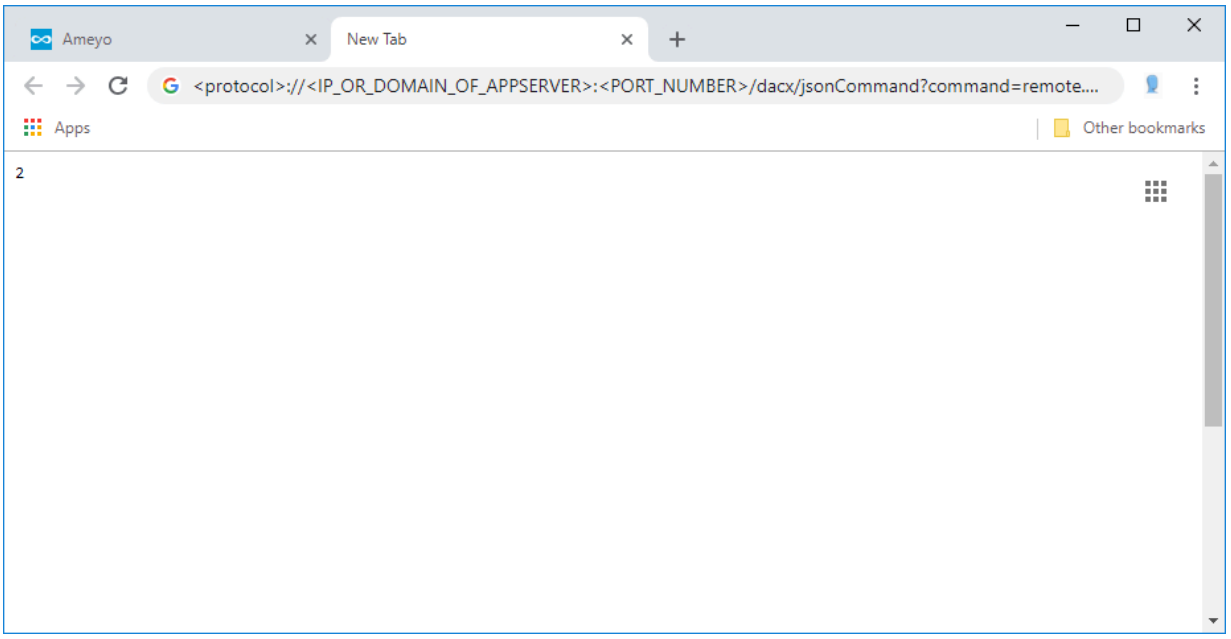
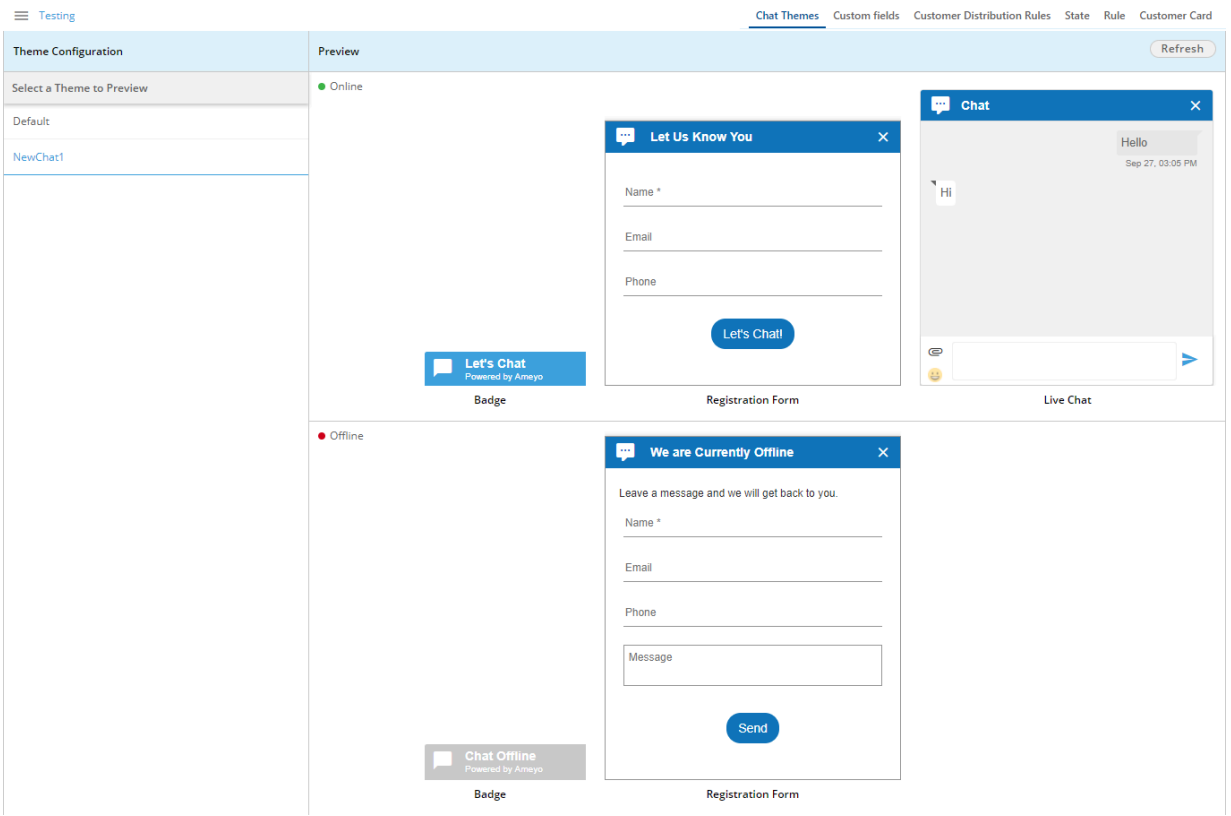


Figure: Add Theme API

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



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

Add Property to Theme API

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

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

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

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<SESSION_ID>	Session ID of the Administrator's current login session, which you have obtained through the command given above.
<THEME_ID>	Provide the ID of the theme that you want to modify.
<SCREEN_NAME>	Provide the name of the theme configuration that you want to modify.
<COMPONENT_NAME>	Provide a name for the component, of which formatting you want to modify.
<PROPERTY_NAME>	Provide a name for the property of the already provided component, of which formatting you want to modify.
<VALUE>	Provide a value for the already provided property. Common property value formats are given below. • **COLOR or TEXT_COLOR:** 'RGBA(<number>,<number>, <number>,<number>)' • **TEXT:** Text format • **SHAPE:** cornered or rounded.

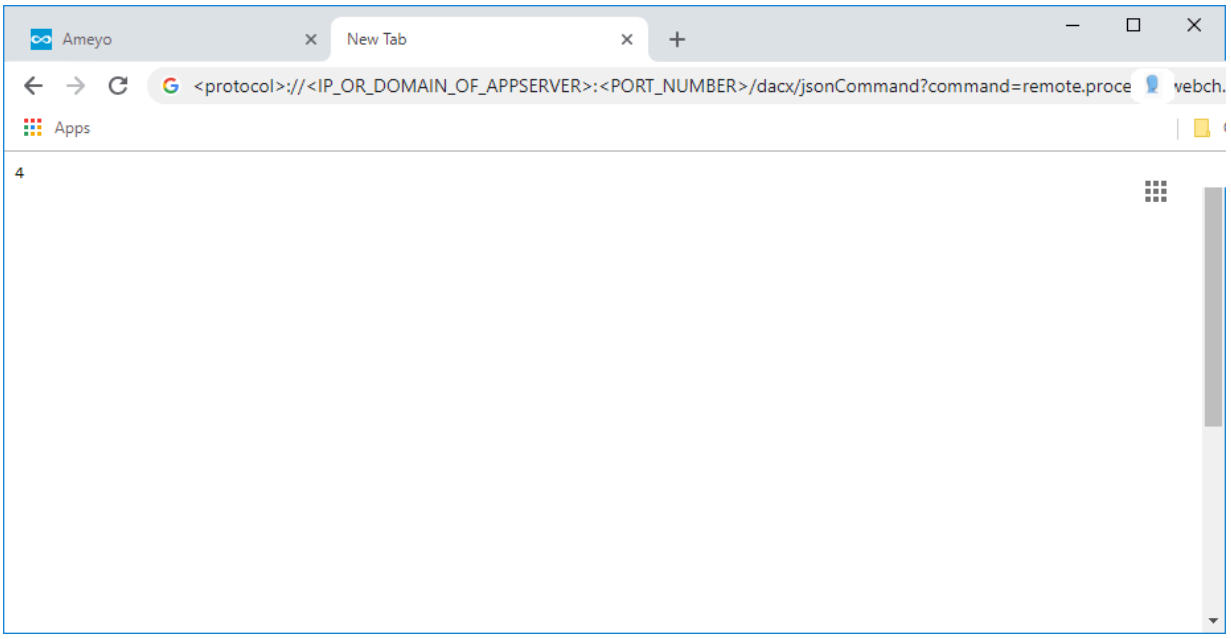
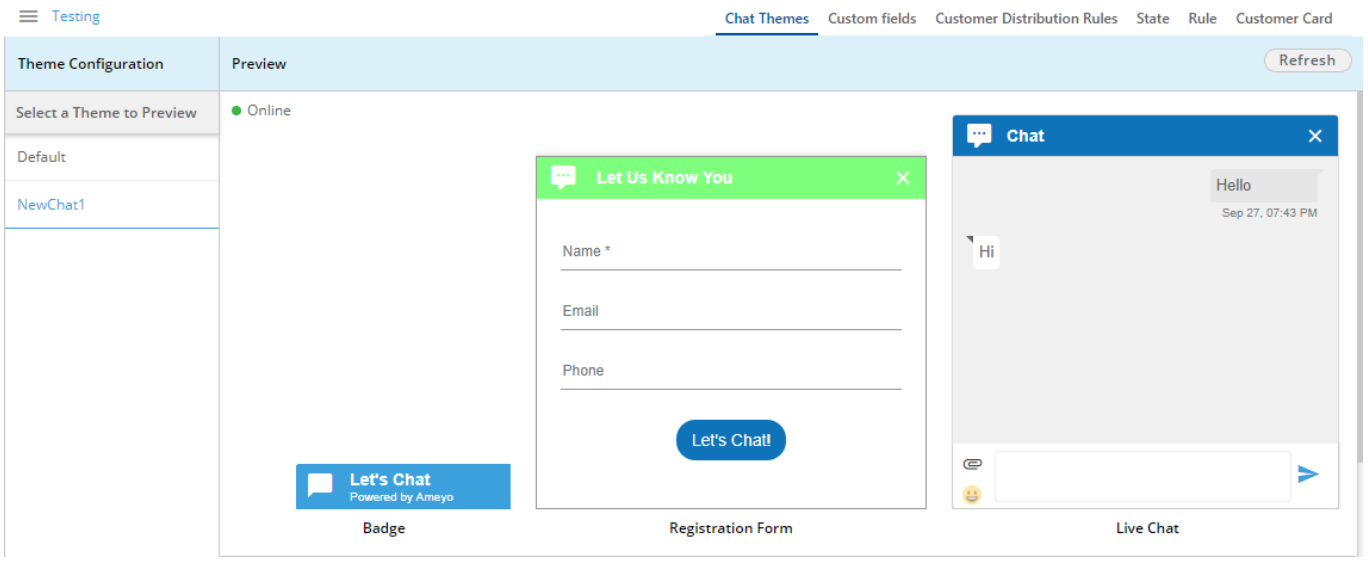


Figure: Add Property to Theme API

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



Rename Theme API

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

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

```
<protocol>://<IP_OR_DOMAIN_OF_APPSERVER>:<PORT_NUMBER>/dacx/jsonCommand?
command=remote.processor.webchatThemeConfigurationService.updateWebchatThemeC
```

```
onfiguration&data={sessionId:<SESSION_ID>,themeId:<THEME_ID>,themeName:
<NAME_OF_THEME>,enabled:<BOOLEAN>}
```

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<SESSION_ID>	Session ID of the Administrator's current login session, which you have obtained through the command given above.
<THEME_ID>	Provide the ID of the theme that you want to modify.
<NAME_OF_THEME>	Provide the Name of the theme that you want to modify such as 'THEME_NAME'. (Add single quote).
<BOOLEAN>	true or false

Apply Theme API

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

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

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

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<CAMPAIGN_ID>	You have to provide the ID of the campaign, which you can get from the campaign settings.
<NODEFLOW_ID>	Provide the ID of the nodeflow where the selected Chat Theme will be applied. Execute the following commands at the server operating system where Ameyo Server is installed. psql -U postgres: to enter the PostgreSQL console. \c ameyodb: to enter the database. select * from acd_node_to_aq_mapping;: to get the information on nodeflow along with its ID.
<THEME_ID>	Provide the ID of the theme that you want to apply on the selected nodeflow in the selected campaign.

Get Theme Configuration API

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

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

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

Replace the following variables.

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

Remove Theme Configuration API

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

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

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

Replace the following variables.

Variable	Required Value
<protocol>	HTTP or HTTPS
<IP_OR_DOMAIN_OF_APPSERVER>	IP Address or Domain Name of the Site where Ameyo Application is running.
<PORT_NUMBER>	8888 for HTTP or 8443 for HTTPS
<SESSION_ID>	Session ID of the Administrator's current login session, which you have obtained through the command given above.
<THEME_PROPERTY_ID>	Provide the ID of the theme configuration (also called Property ID) that you want to delete. Execute the following commands at the server operating system where Ameyo Server is installed. psql -U postgres: to enter the PostgreSQL console. \c ameyodb: to enter the database. select * from webchat_theme_configuration_properties;: to get the ID of theme configuration.

Remove Theme API

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

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

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

Replace the following variables.

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

19.1.6.2. Custom Fields Tab in Process Settings

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

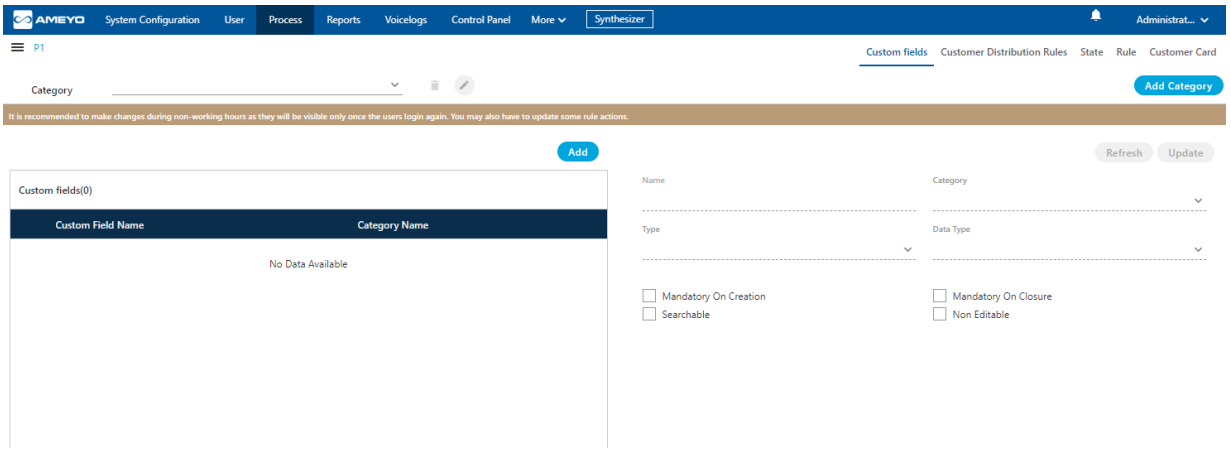


Figure: Custom Fields

Cautionary Line

A cautionary note is displayed at the top of the page stating the following:
It is recommended to make changes during non-working hours since these changes will only become visible after users log in again. Additionally, some rule actions might require updating.

This message clarifies that newly created custom fields will appear on the agent's screen only after the agent logs out and logs back in. Therefore, it is advisable to create or modify custom fields during off-hours to avoid disrupting agents during active sessions.

Default Category of Custom Fields

A default category of Custom Fields named "Default Category" will be created in the backend database while creating a Process. When the Administrator will try to create the Custom Fields without creating a Custom Category, then the Custom Fields will be assigned to "Default Category" by default. Hence, the Custom Fields assigned in "Default Category" will be displayed on the User Interface.

Add a Category of Custom Fields

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

1. Click "Add Category" button on the top left corner. It shows the following pop-up.
2. Provide a name for the category and click "Save".



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

Manage Categories of Custom Fields

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



Figure: Category Drop-down menu

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

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

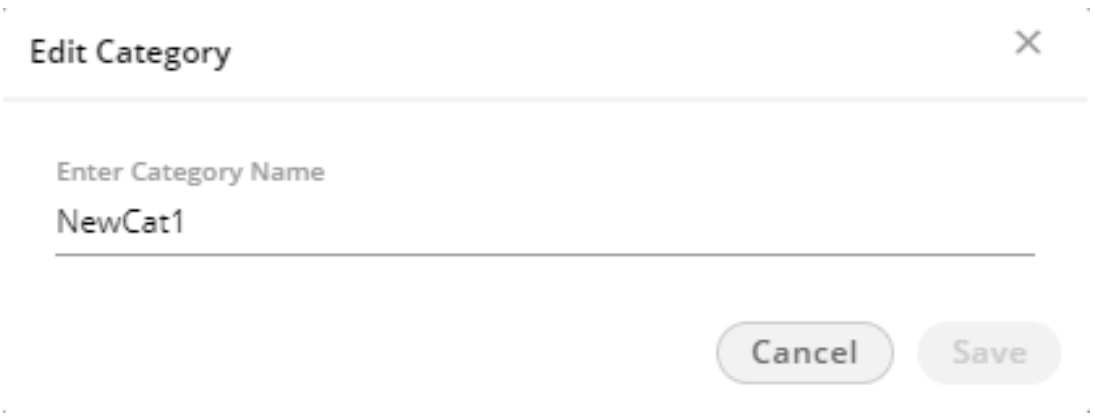
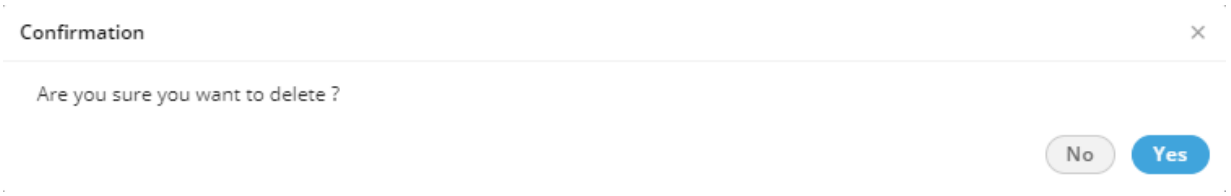


Figure: Edit Category

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

Delete a Category: After selecting a category, click on delete icon to remove a cartegory. The following warning message is displayed



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

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

Create a Custom Field

Perform the following steps to create a custom field.

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

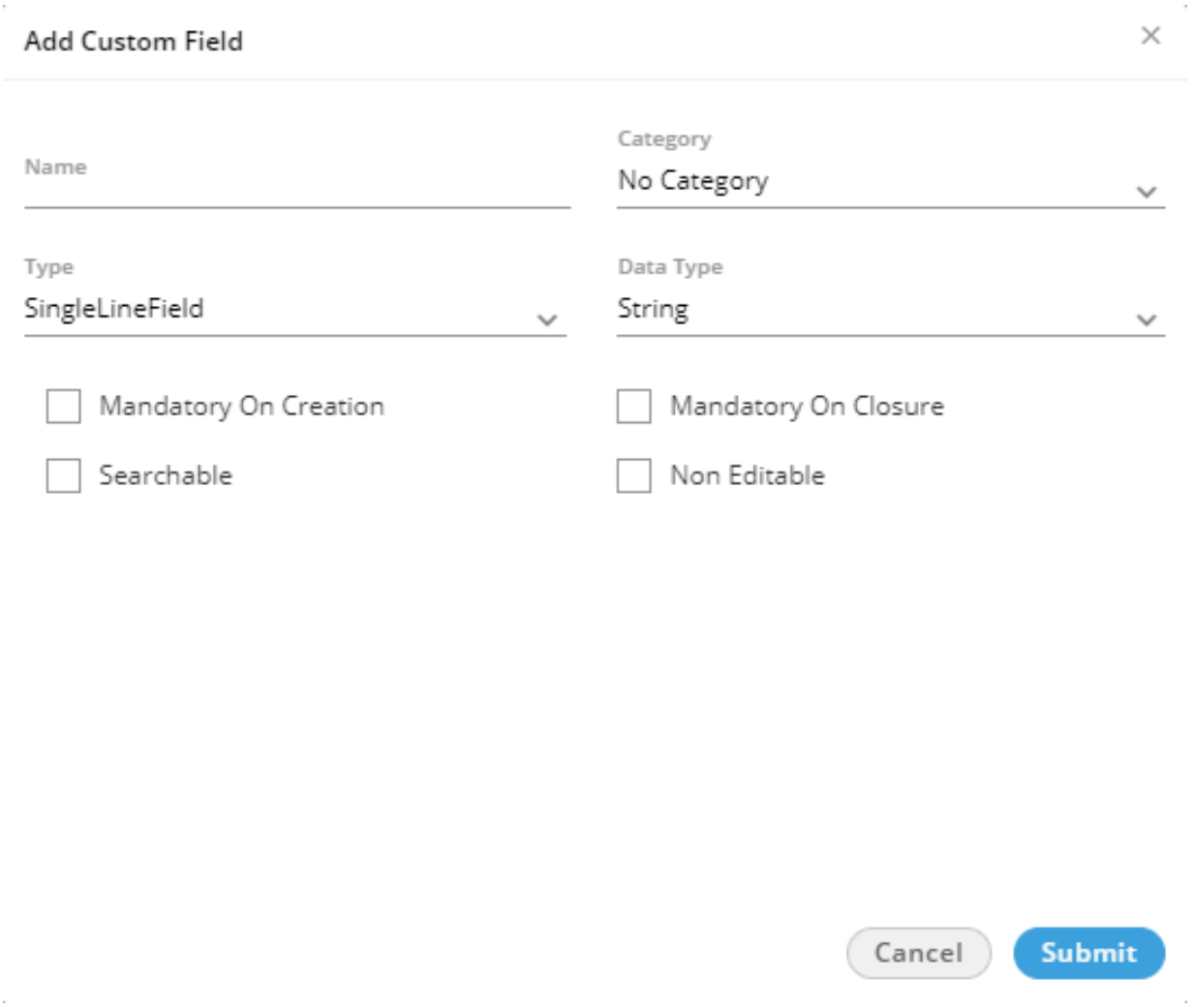


Figure: Pop-up to create a Custom Field

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

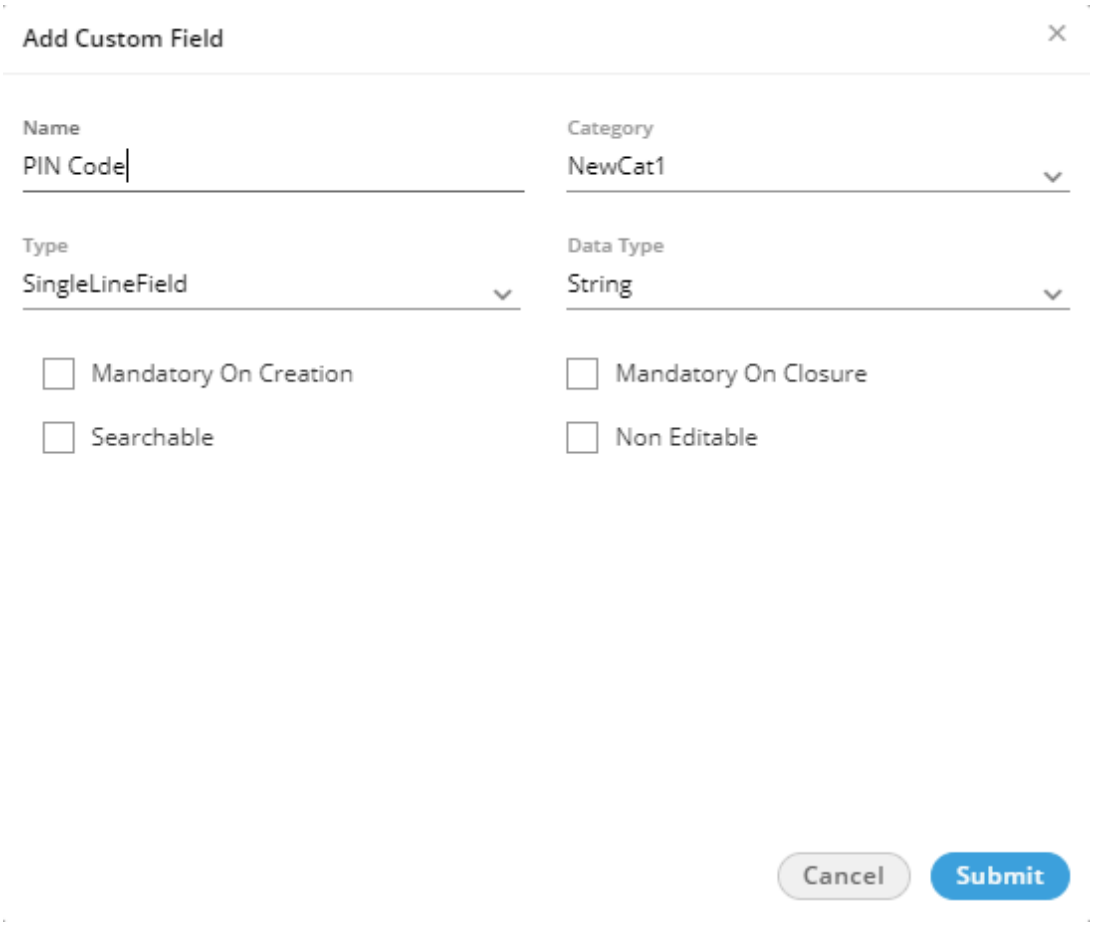


Figure: Single Line Text Field

- Select any of the following data types for this field.
  - String
  - Integer
  - Decimal

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

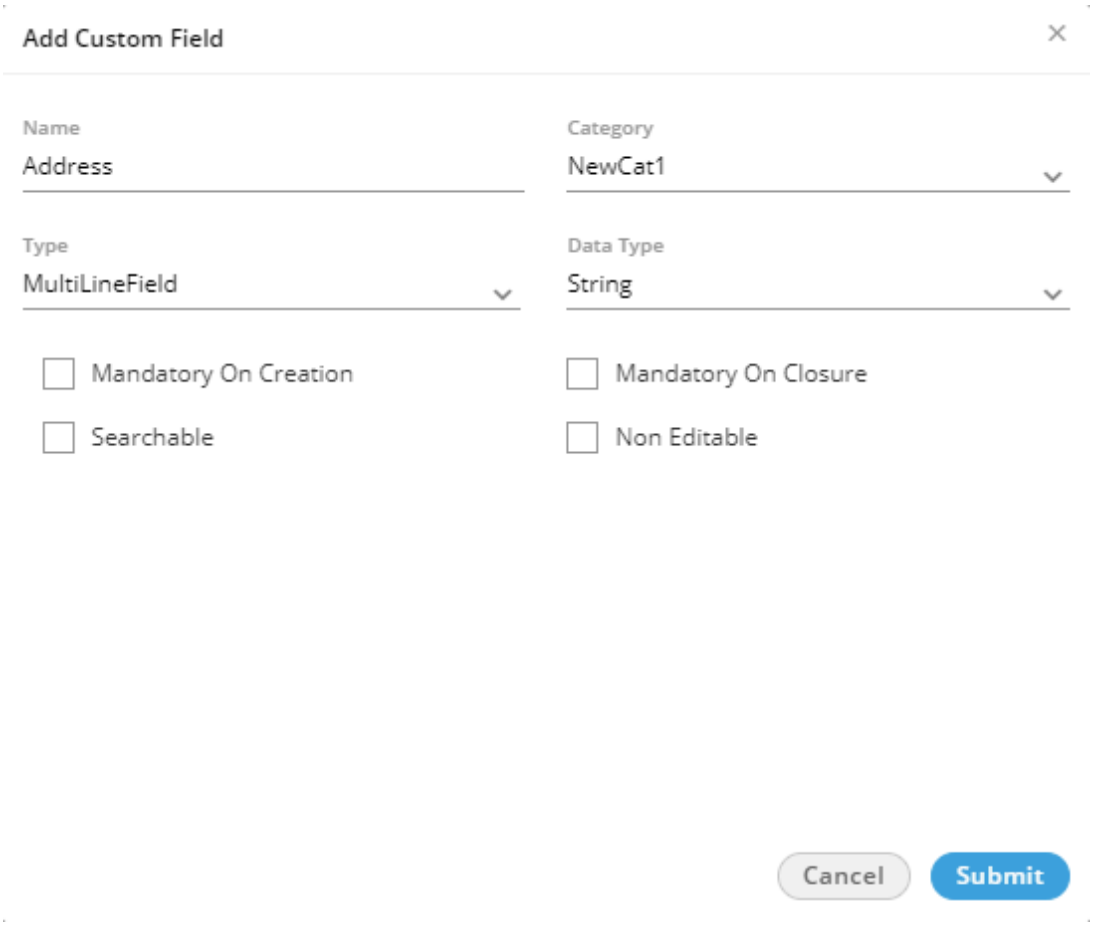
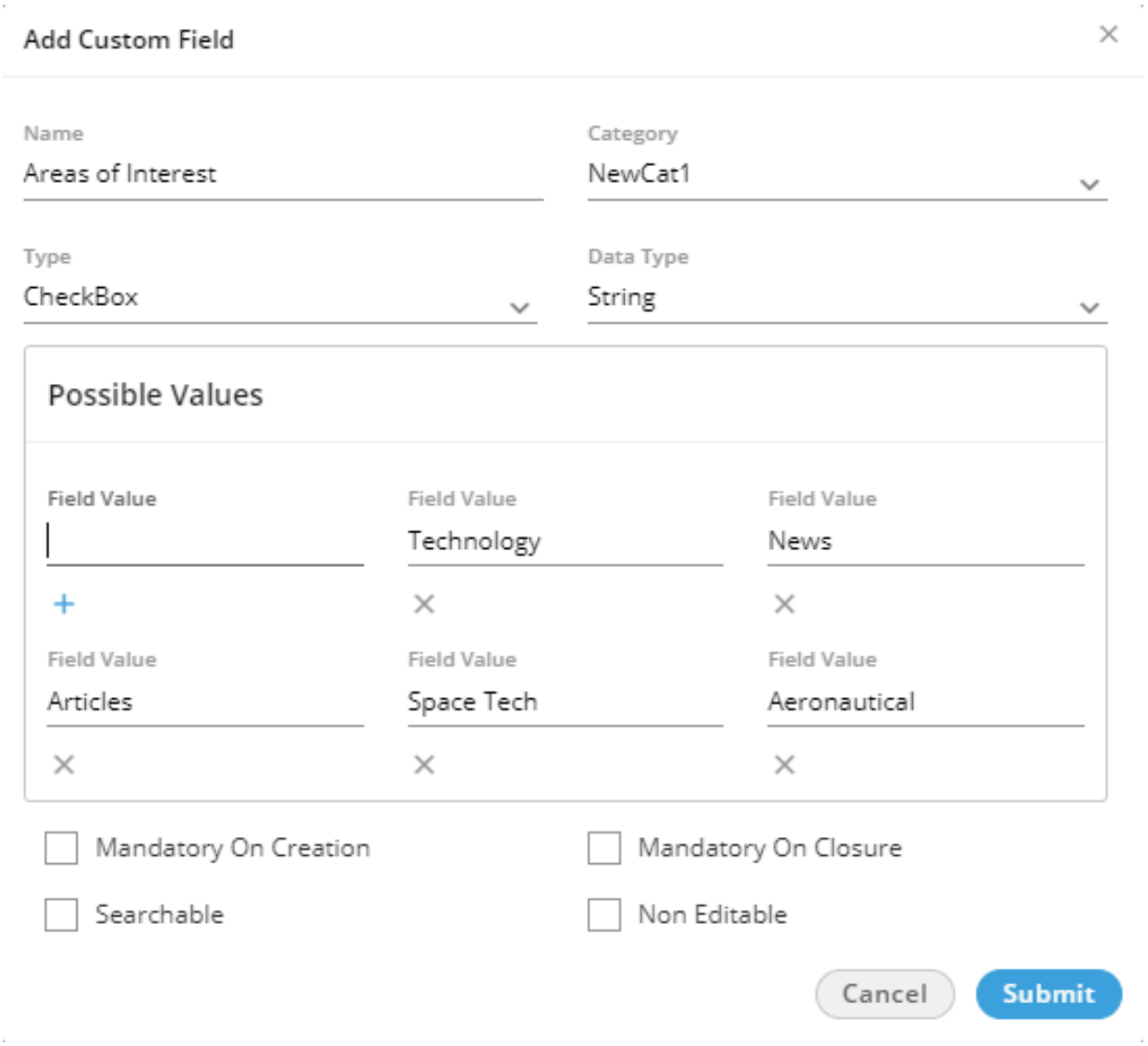


Figure: Multi Line Text Field

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

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



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

Select any of the following data types for this field.

- String
- Integer
- Decimal
- Boolean

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

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

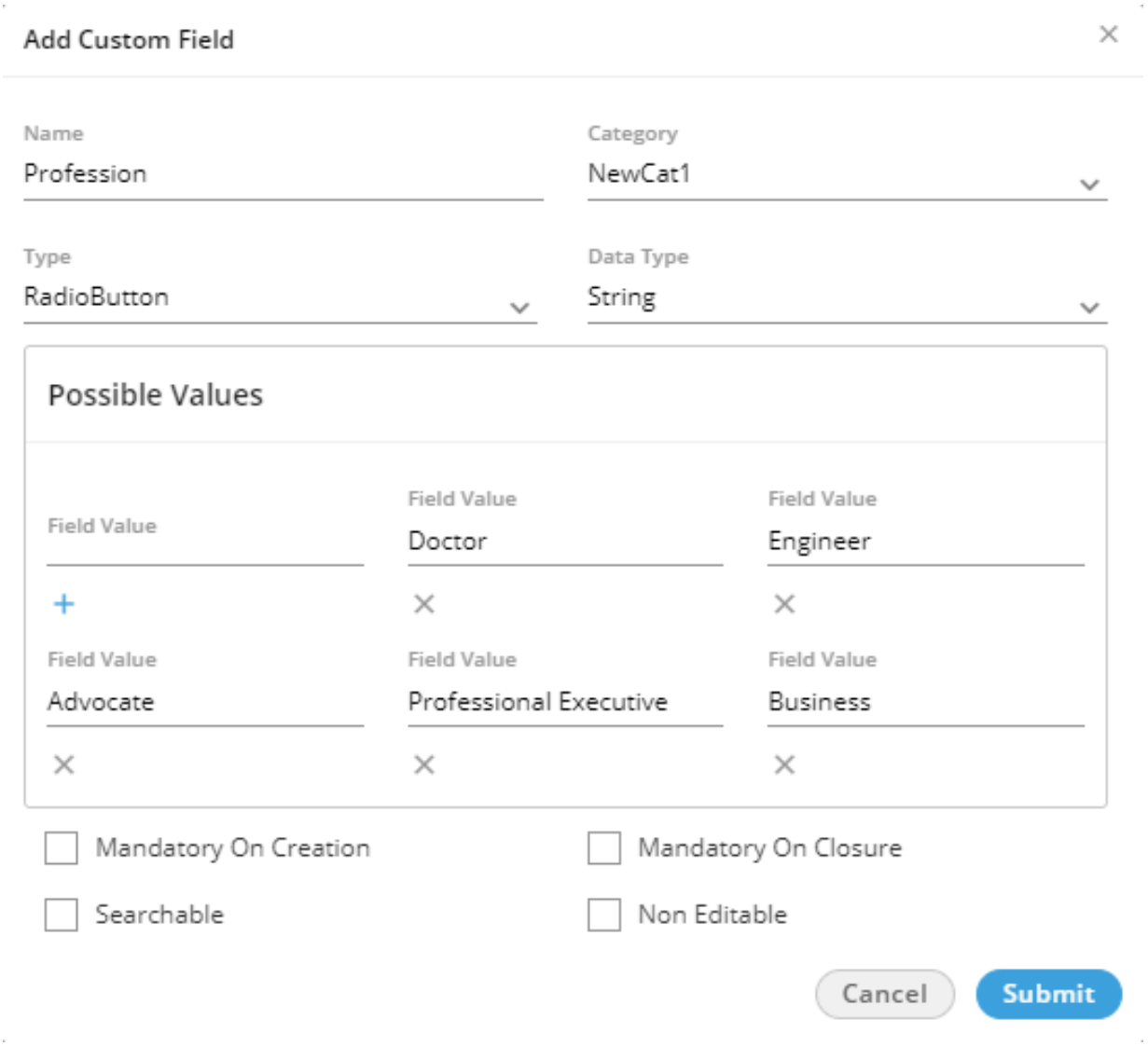


Figure: Checkboxes as Custom Fields

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

Select any of the following data types for this field.

- String
- Integer
- Decimal

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

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

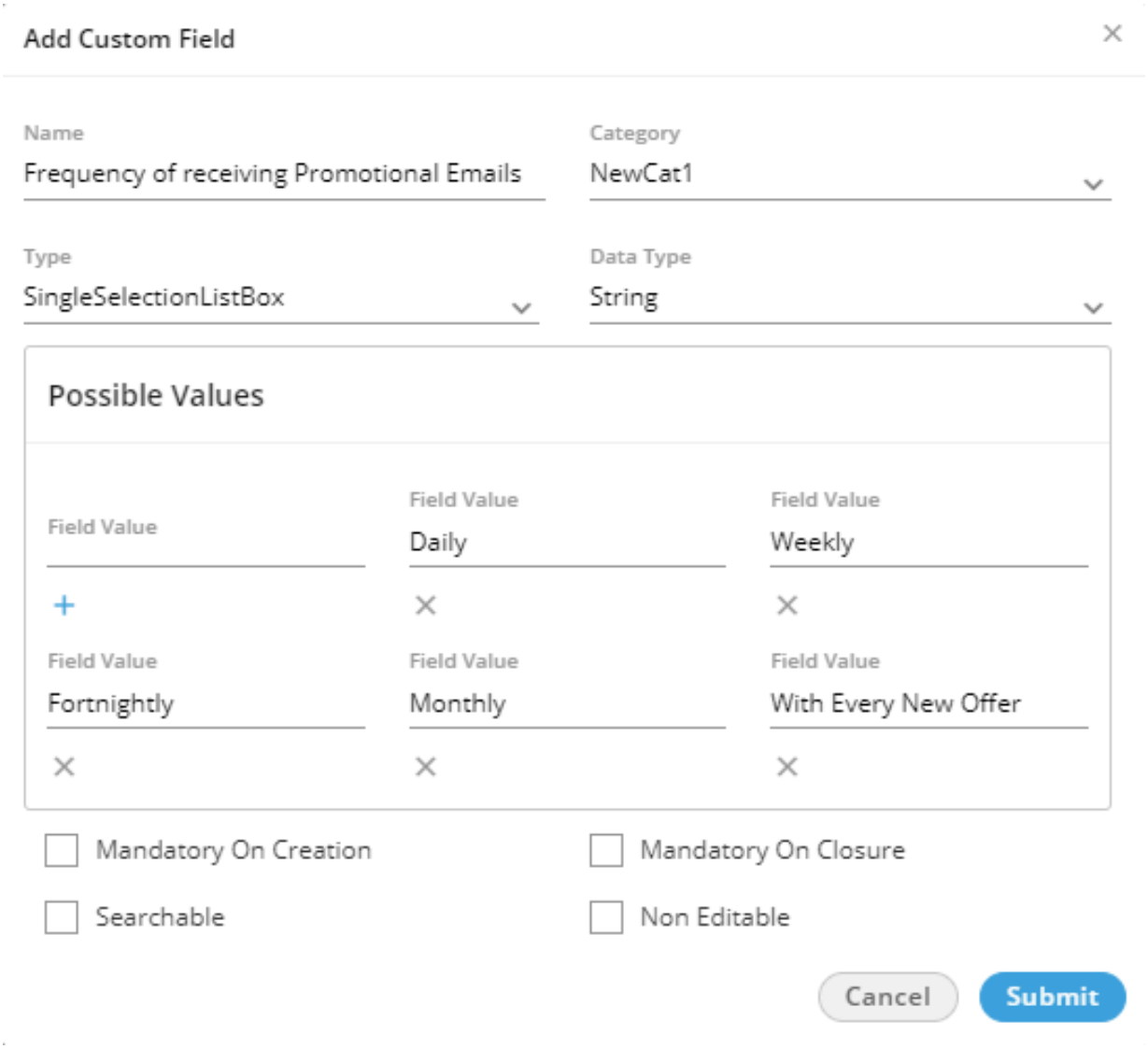


Figure: Single Selection List

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

Select any of the following data types for this field.To delete a field value, click "X" icon below it.

- String
- Integer
- Decimal

6. **MultiSelectionListBox:** Select it to create a list containing multiple values. The user can select any or mutliple values.
Selecting it shows "Possible Value" section in the pop-up.

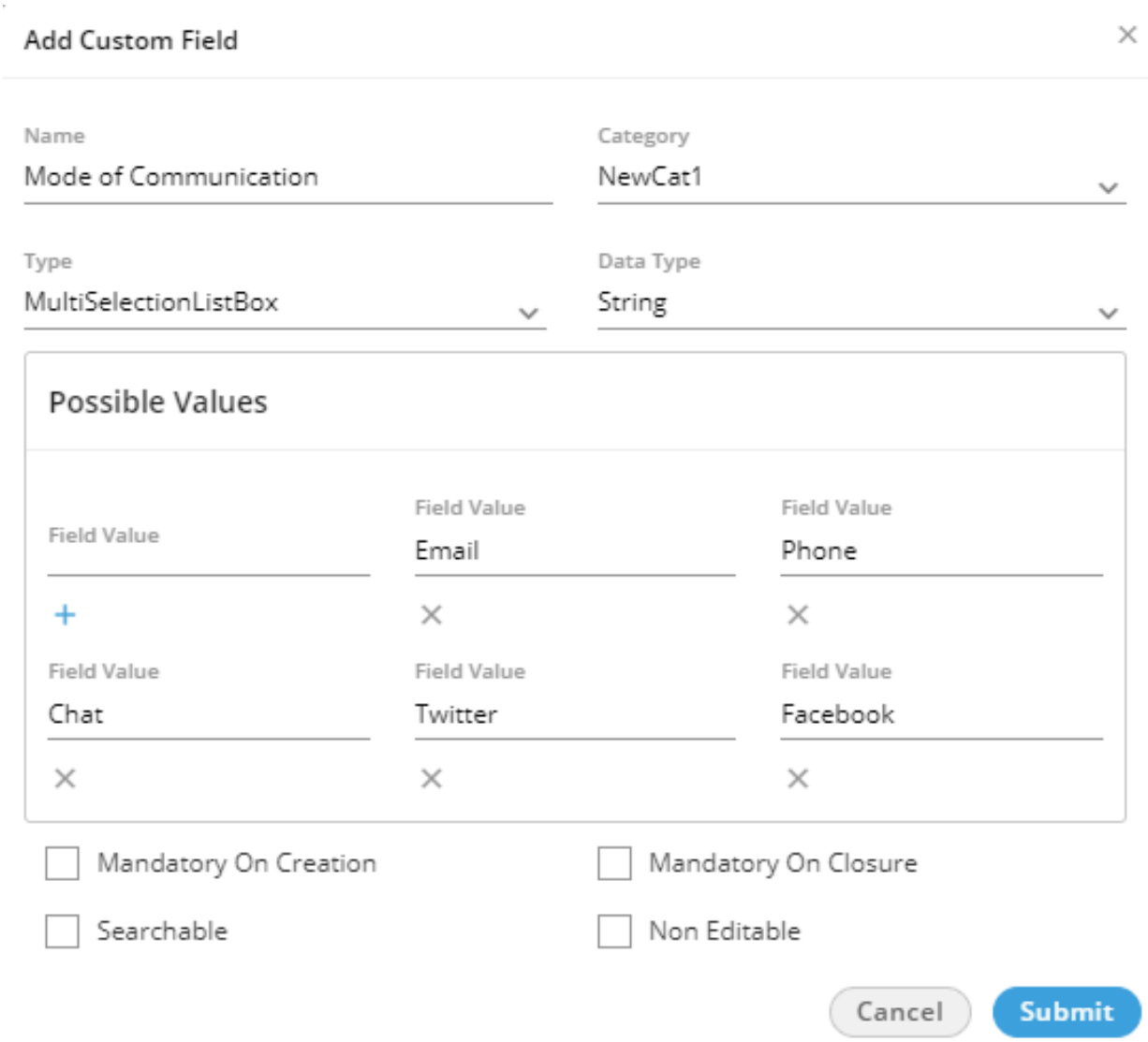


Figure: Multi-Selection List

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

Select any of the following data types for this field.To delete a field value, click the "X" icon below it.

- String
- Integer
- Decimal

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

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

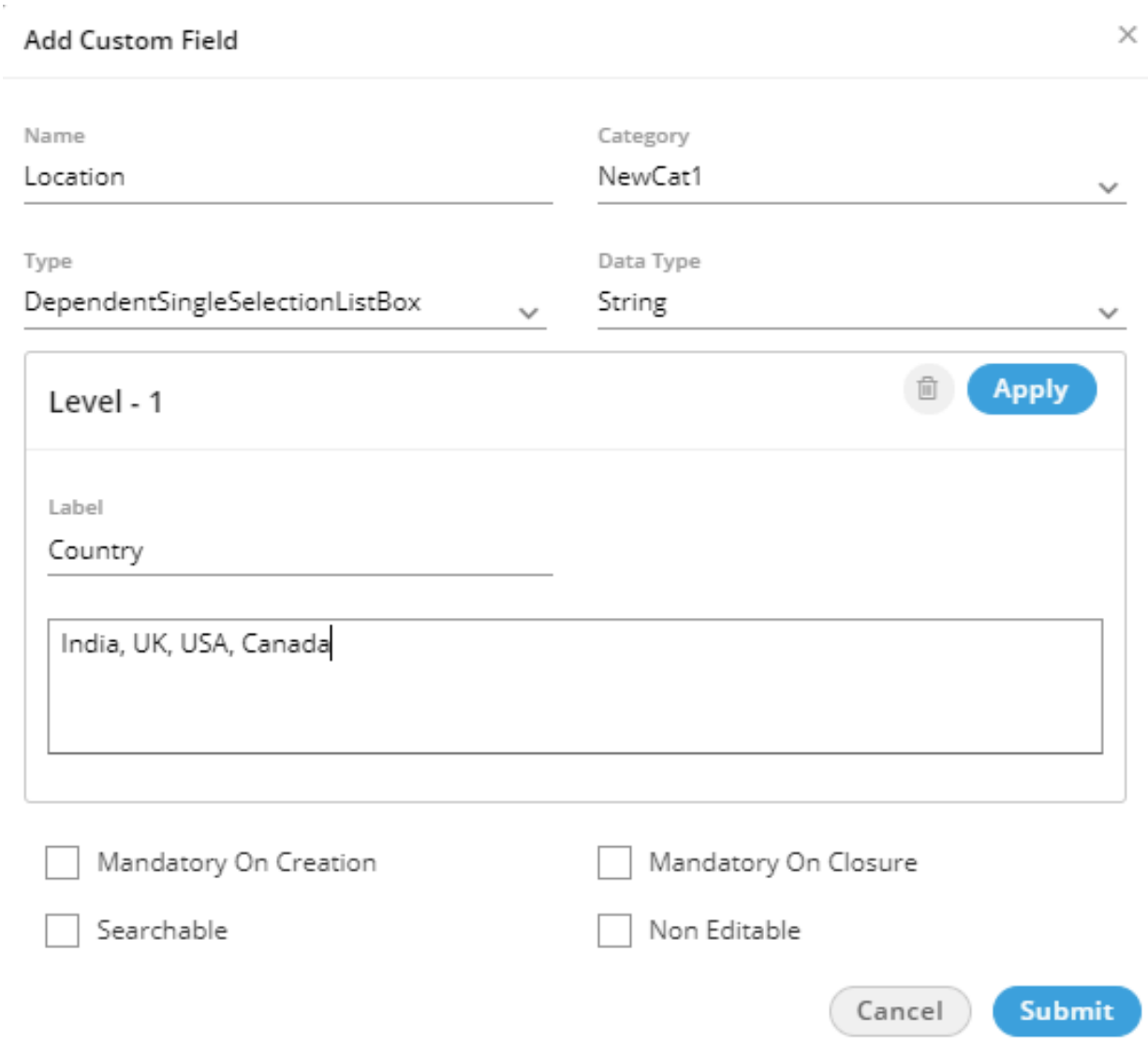


Figure: First Level of Dependent Single Selection List

Perform the following steps.

1. In "Possible Values" section, provide a label for the first level of the list.
2. Type the comma separated values in the text area.

> Scroll Bar Information: In case of multiple values, the scroll bar will be displayed in this text area.

3. Now, you can click "Apply" to create the first level of the list.

4. To create the second level list, click "Add Level" just below the first level.
5. A drop-down menu lists all values of the First Level List. You can select a First Level Value
6. Provide a label name and enter the multiple values in the comma separated format.
7. Click "Apply" to create a second level list.
8. Select another value of First Level List in the drop-down menu, provide a label, and then enter comma-separated multiple values.

> You can scroll down to enter the values for the next fields.

9. Click "Apply" to save the list

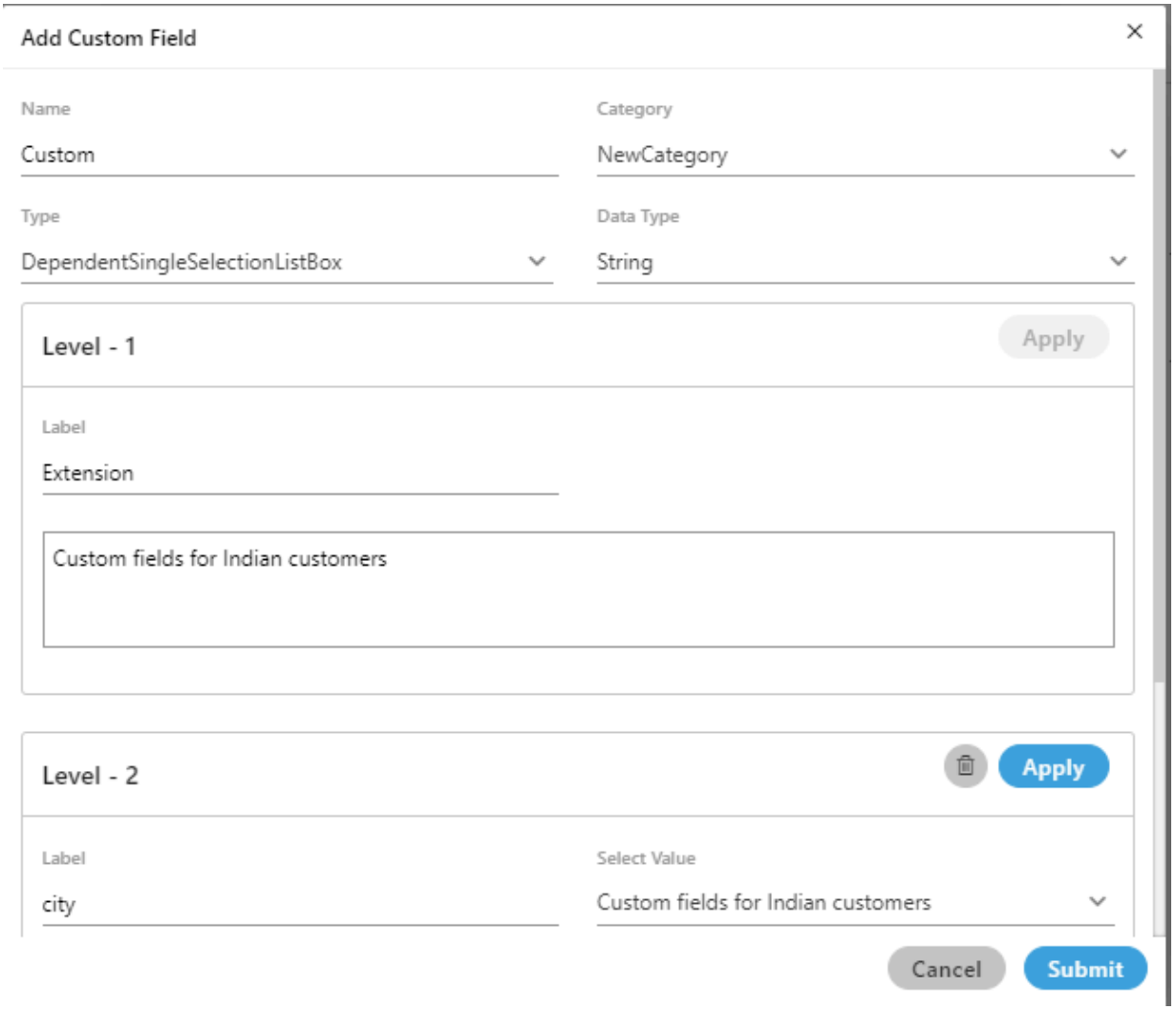


Figure: Multiple Levels of Dependent Single Selection List

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

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

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

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

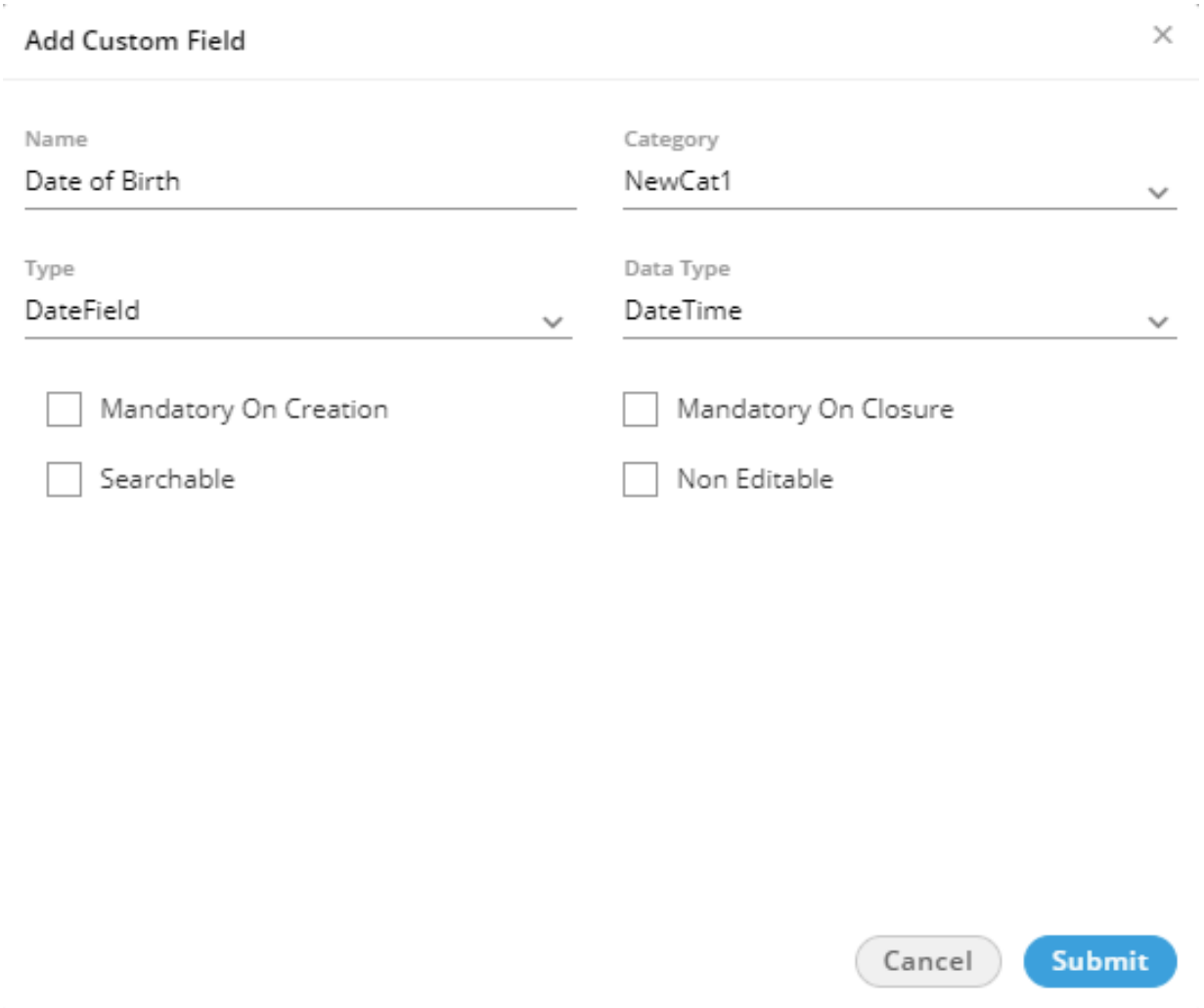


Figure: Custom Date Field

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

9 Regex: The Regex custom field is used to store the custom unique identifier for the tickets.

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

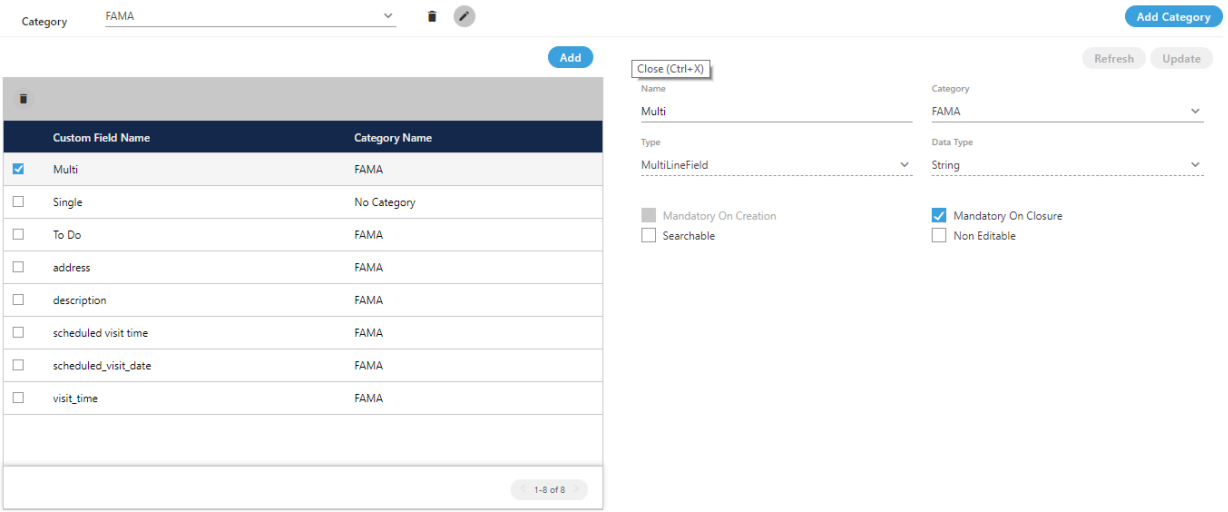


Figure: List of Custom Field

View and Modify Custom Field

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

1. Click the checkbox of a custom field to select it. Its details are displayed on the right side.
2. You can change the following values here.
    - Name
    - Category
    - Add or remove possible values
    - Make it mandatory to fill either on the creation or the closure of a ticket

- Make it searchable or not
- Make it editable or non-editable by the user

3. Click "Update" to apply the changes.
   Rather, you can click "Cancel" to discard the changes.

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

Delete a Custom Field

> The deleted custom field cannot be restored.

Perform the following steps to delete a custom field

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

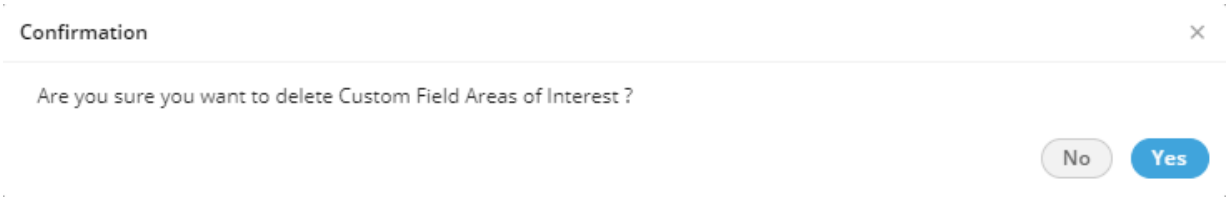


Figure: Deletion Confirmation Message

19.1.6.2.1. Regex Custom Fields in Process Settings

In Ameyo omni contact center, custom fields in a ticket allow you to store additional information specific to your business requirements. These fields can be used to reference data or trigger actions in other systems through HTTP Actions. However, for such references or actions to work reliably, the captured data must be valid.

For instance, a business may store order details in a CRM application where each order is identified using a predefined format such as ABC123456 or ABC123457. During a customer interaction, an agent can record the order ID in a custom field that is passed to another system. Before doing so, the business needs a mechanism to validate the entered order ID.

To address this requirement, the Ameyo Application Server now includes a new Custom Field Type called "Regex". This option allows administrators to create a custom field with validation logic based on regular expressions. It ensures only valid string values are accepted according to the defined pattern.

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

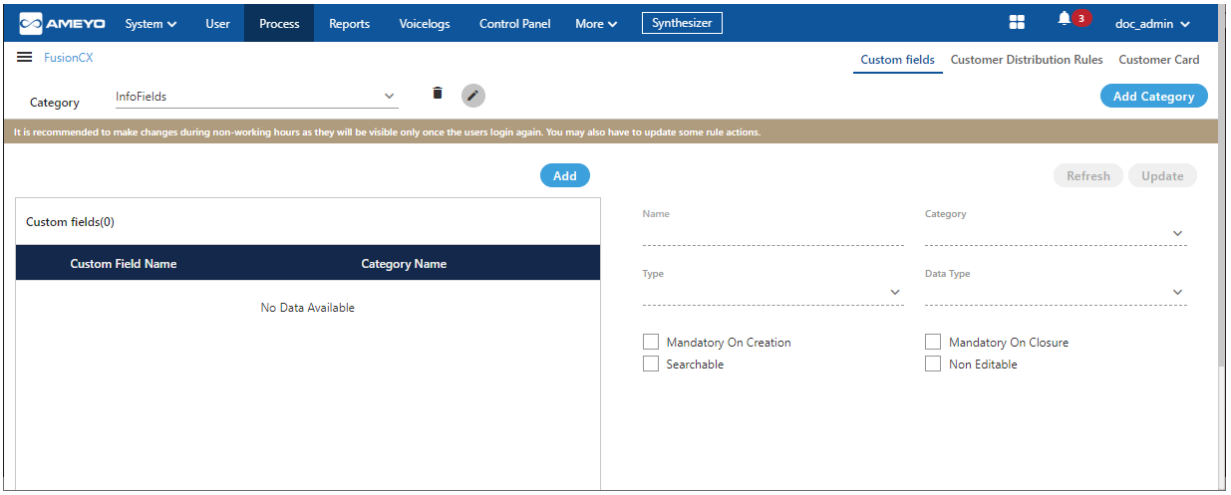


Figure: Custom Field Tab

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

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

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

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

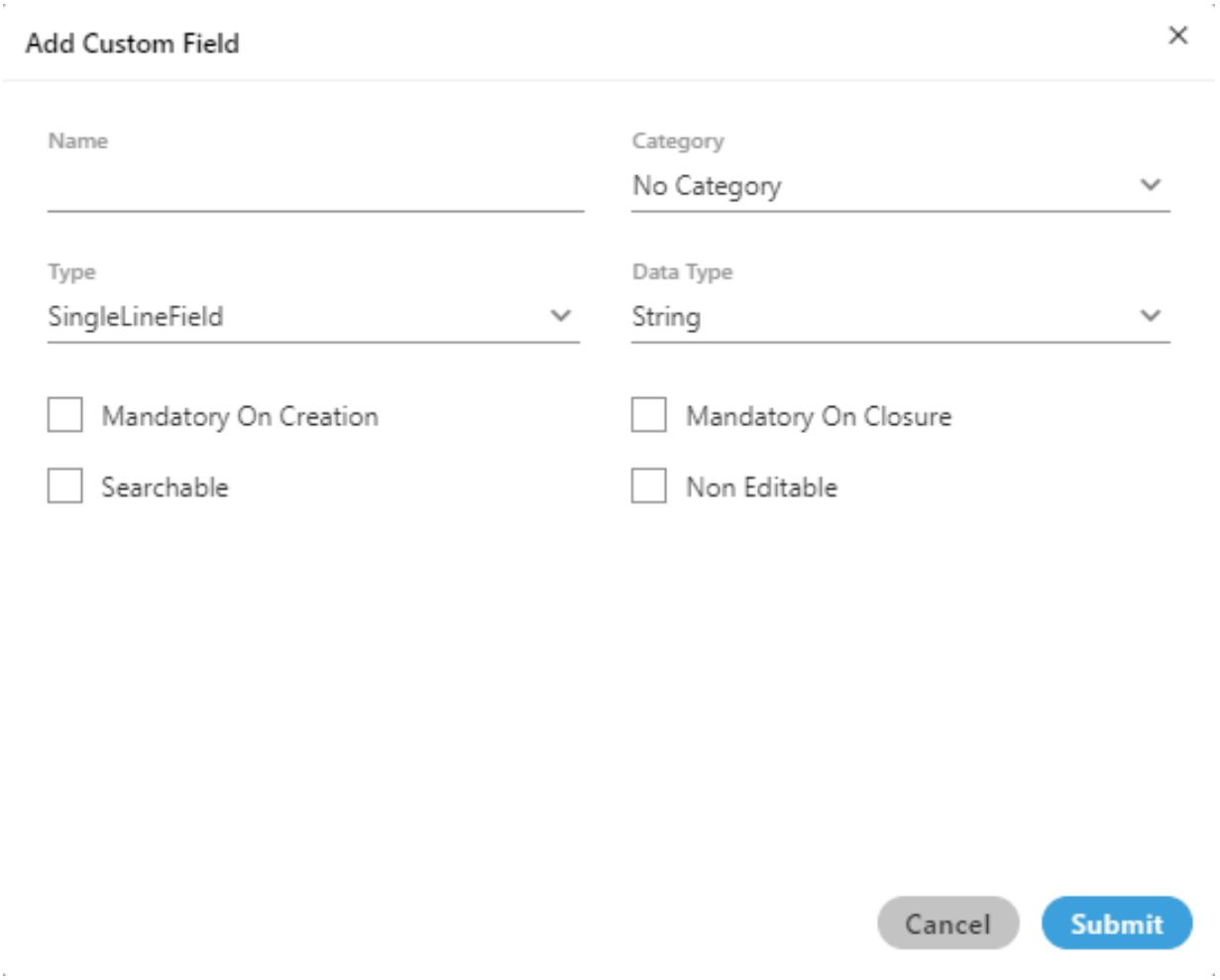


Figure: New Custom Field

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

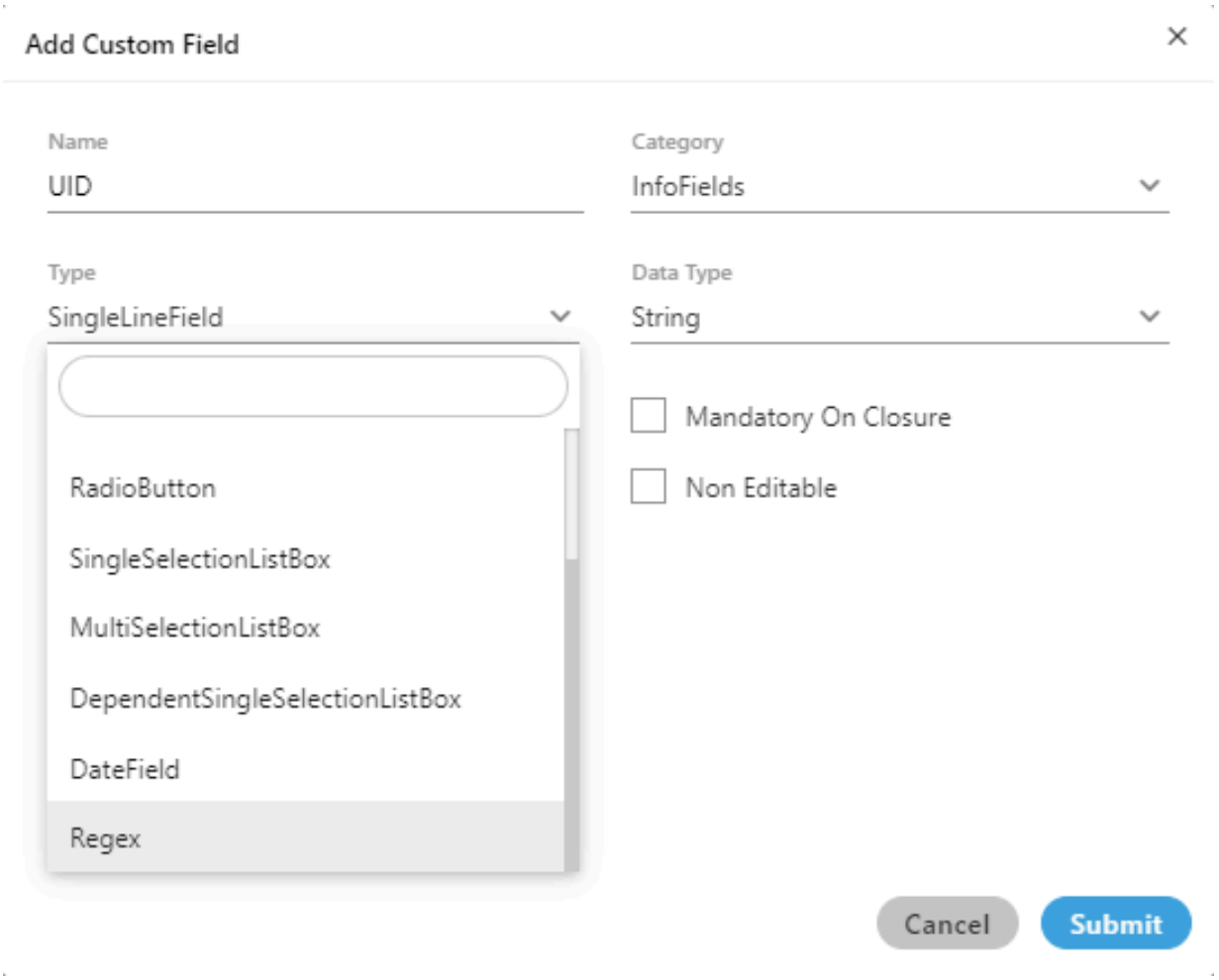


Figure: Types of Custom Field

5. Select "Regex" as a type of the custom field.
6. The default data type of "Regex" is "String".
7. The next step is to provide the Regular Expression. To create a Regular Expression, the Ameyo User can provide a range of letters or numbers, such as the following examples.

- **[a-z]:** It denotes a single small-case letter between "a" to "z".
- **[A-Z]:** It denotes a single capital-case letter between "A" to "Z".
- **[1-9]:** It denotes a single number between "1" to "9."
- **[a-c]:** It denotes a single small-case letter between "a" to "c".
- **[D-F]:** It denotes a single small-case letter between "D" to "F".

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

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

8. After entering the Regular Expression, the Ameyo User can provide a sample value in "Test a String" text field and click on forward arrow icon to test whether the provided test value is valid or not.

Example 1: The test value in the following case is valid as per the provided Regular Expression.

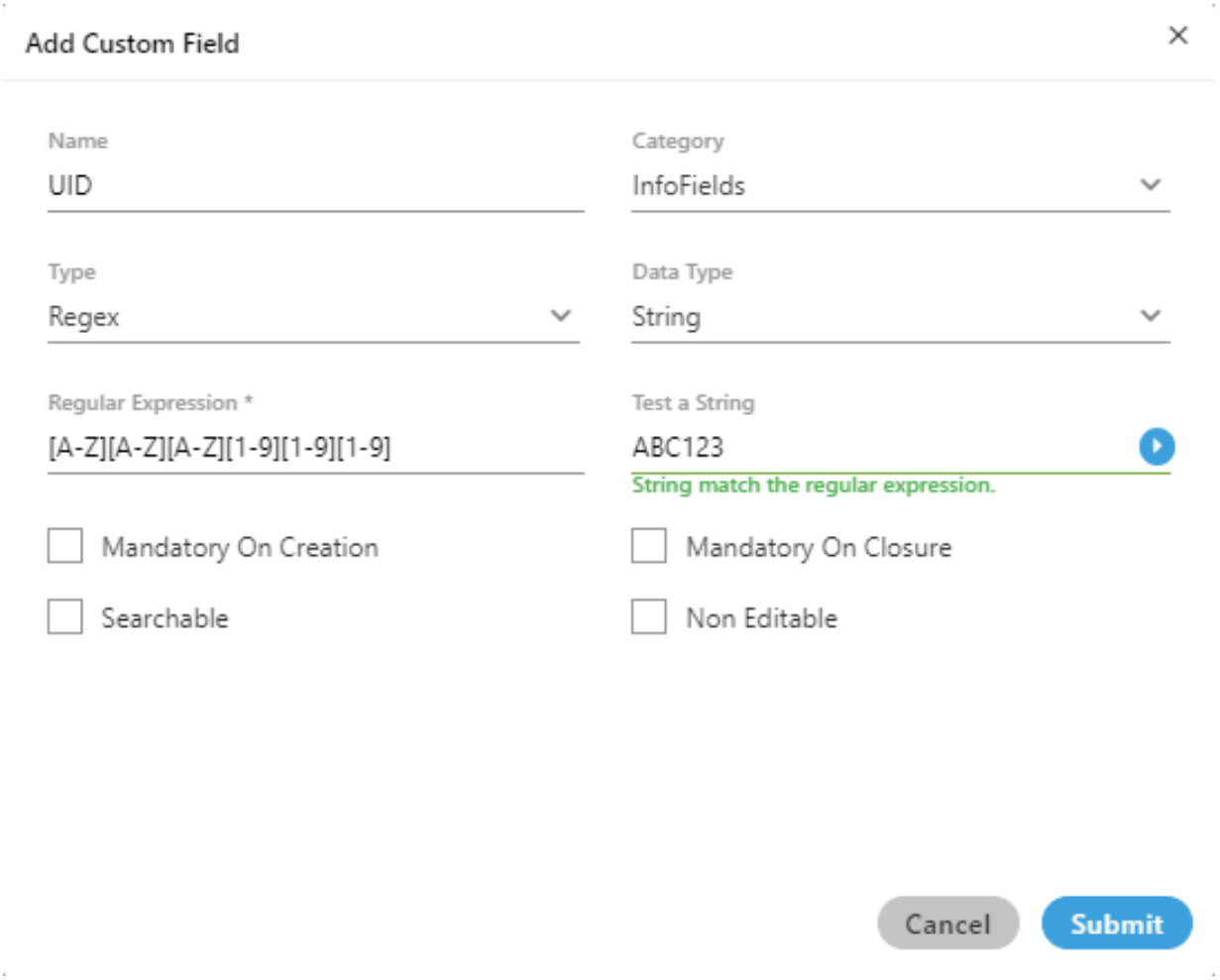


Figure: Successful Validation of the test value

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

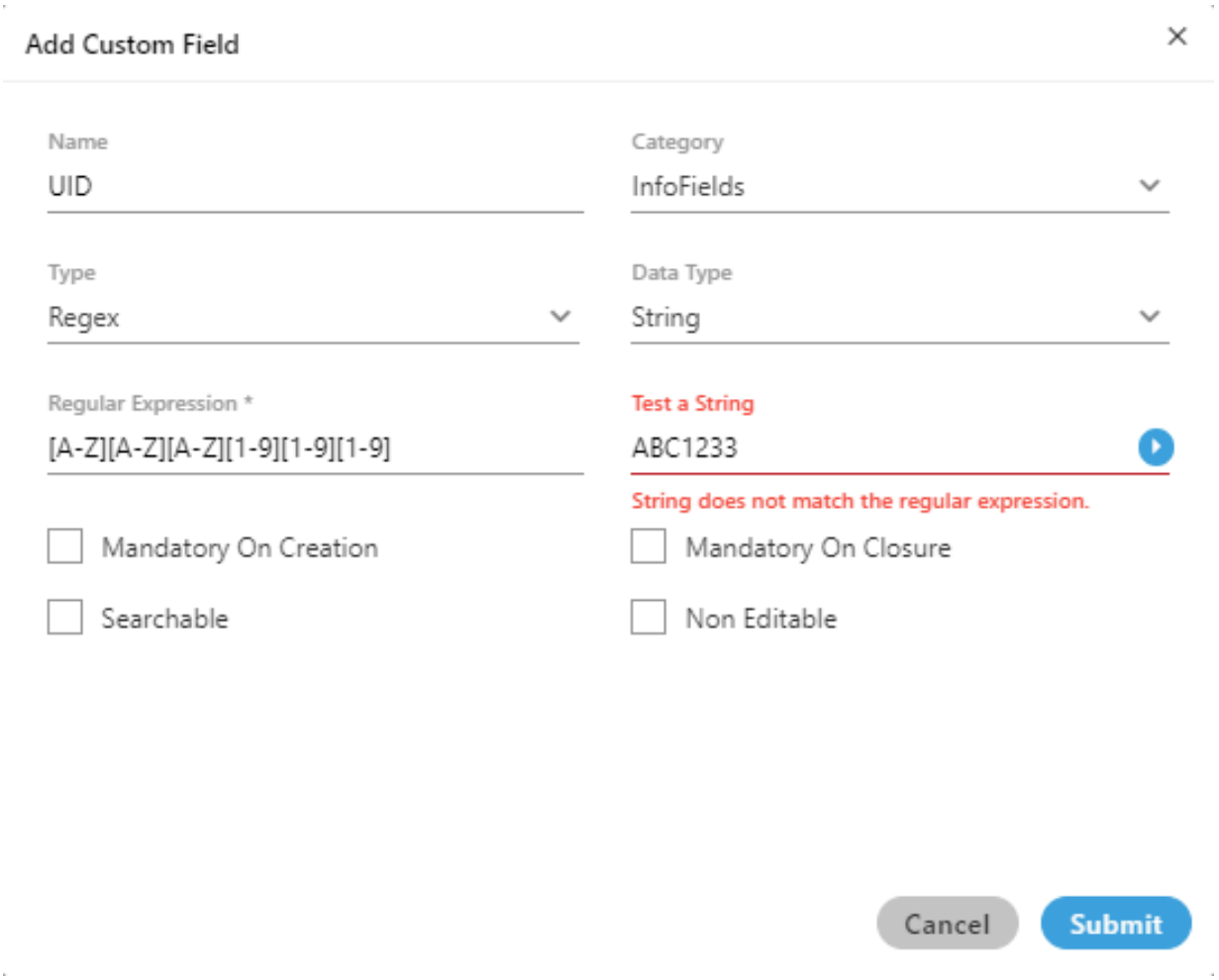


Figure: Failed Validation of the test value

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

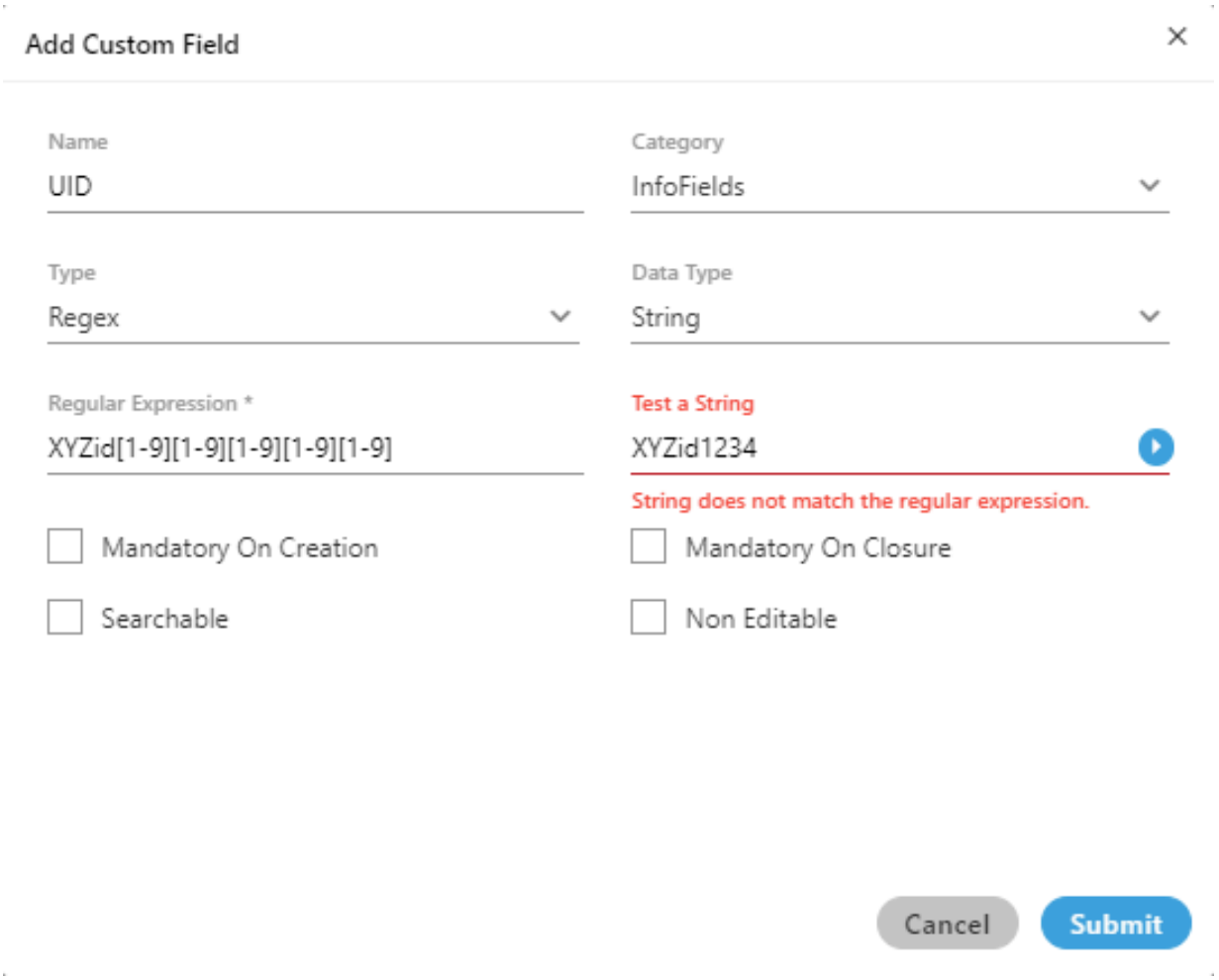


Figure: Failed Validation of the test value

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

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

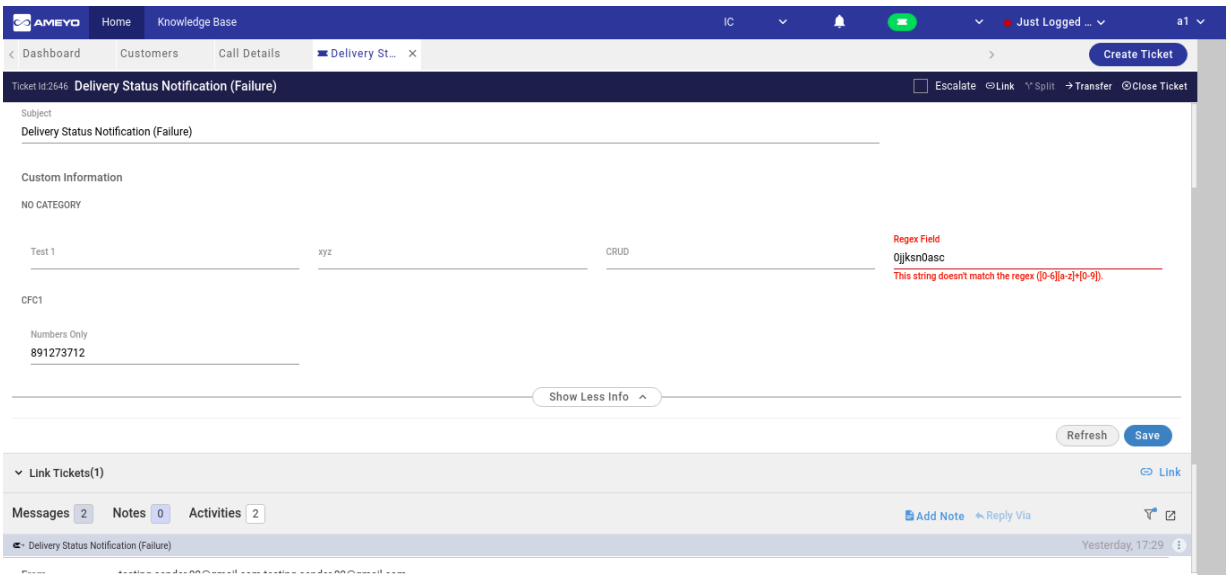


Figure: Inline Error Message for Regex Field on Agent Console

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

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

19.1.6.3. Customer Distribution Rules

The administrator can upload the customer data at process level.

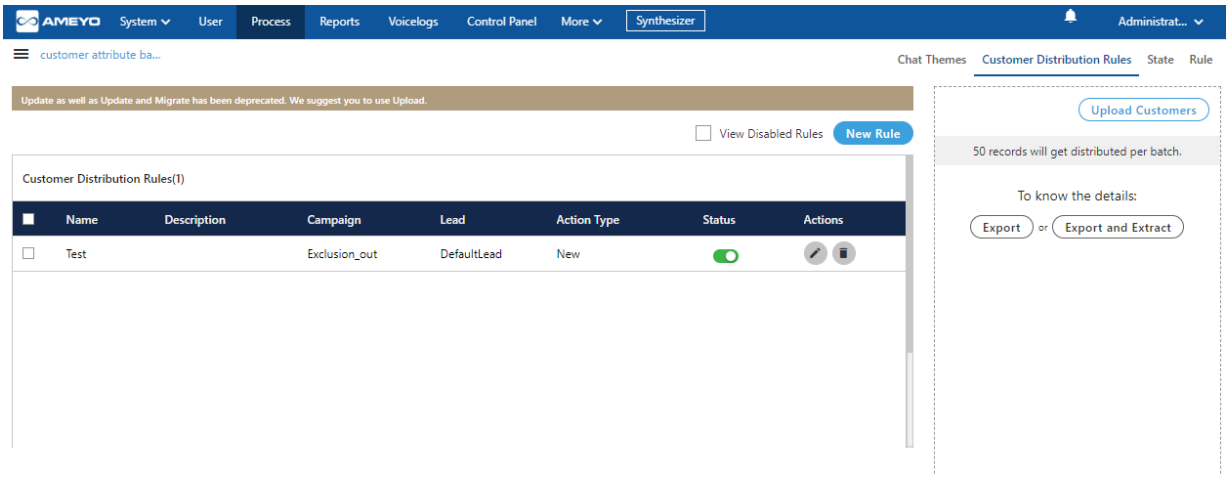


Figure: "Customer Distribution Rules" Tab in Process Settings

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

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

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

Step	Process Flow
	Process-level. The user can also download the data from Customer Prospect table of any process.

The complete page is divided into two following sections:

Right Section

The right section provides the Administrator with options to upload customers via CSV, export customer data to a CSV file, or perform both export and removal of customer data from the system. It includes the following options:

Upload Customers

Click this button to import a list of customers from a CSV file into the Ameyo system.
It is recommended to use the following naming convention for CSV files:
<Process_Name>_<TimeStampofExport>.csv.

Ensure that the column headers in the CSV file match the Table Definition fields of the selected process.

If the headers in the CSV differ from the Table Definition, use the **Provide Header Mapping** option during upload.

To upload customer data from a CSV file:

1. Click **Upload Customers**. A pop-up window appears for you to select and upload the required CSV file.

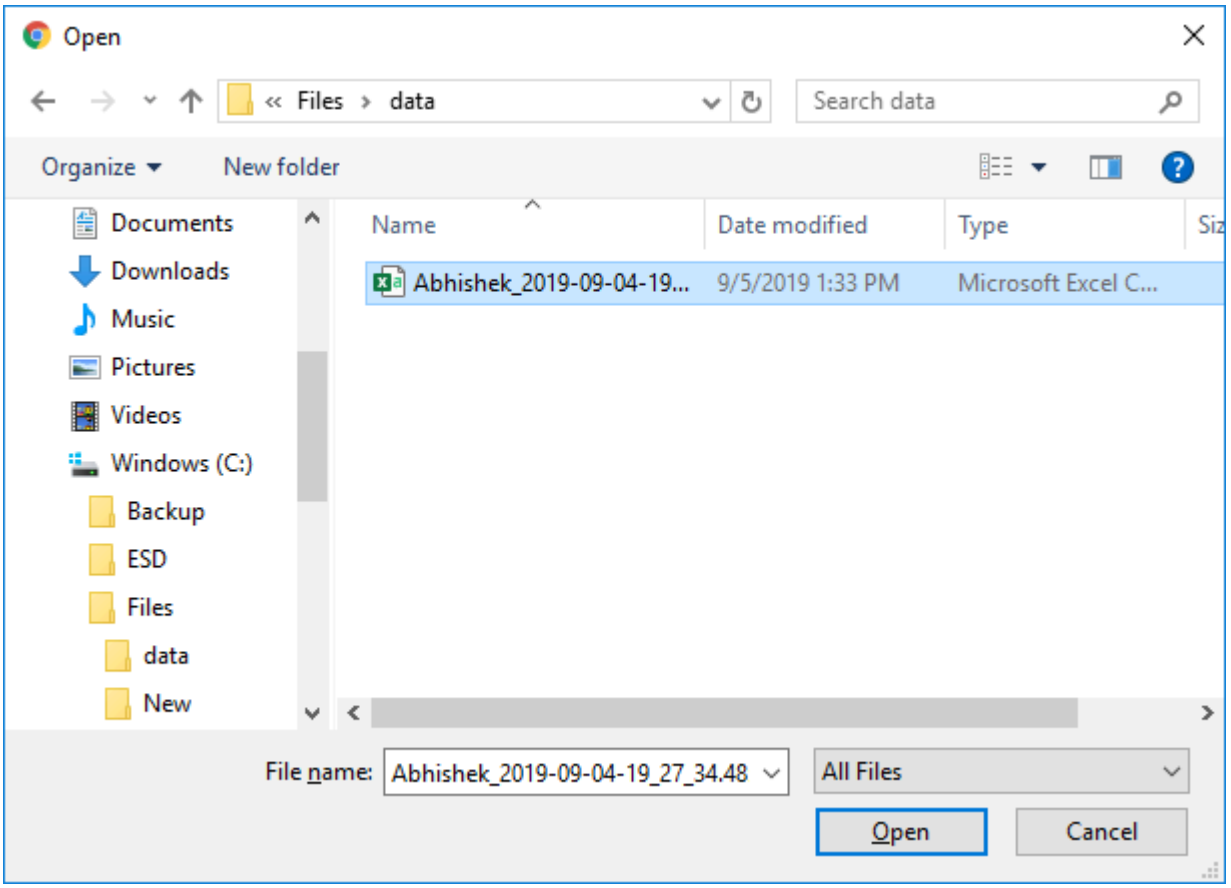


Figure: Open File dialog box

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

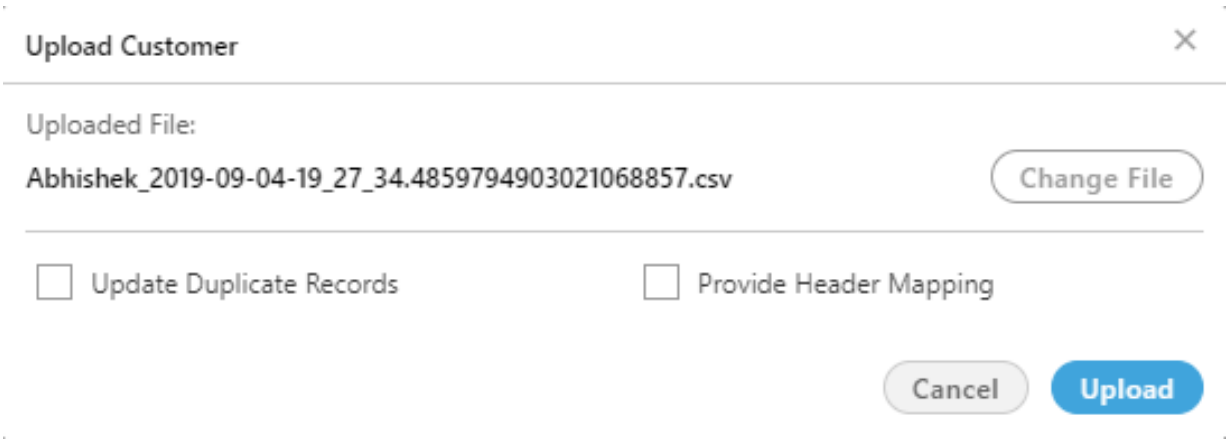


Figure: Pop-up to upload the CSV file

4. Here, you can select the following options.

- Update Duplicate Records: By default, the Ameyo System will not upload those records of Customer Data which are already uploaded in the Ameyo System. You can check this

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

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

twitter	timezone	facebook	phone2	name	phone3	phone4	phone5	email	phone1	additional_column
john	Asia/Kolkata	john@domain.com	12345678 9	John				john@domain.com	12345 67891	NA

Now, an Administrator is uploading the following data, in which the phone2 column contains the different value and phone3 contains the new value.

twitter	timezone	facebook	phone2	name	phone3	phone4	phone5	email	phone1	additional_column
john	Asia/Kolkata	john@domain.com	14679797 9	John	12347978 9			john@domain.com	12345678 91	NA

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

twitter	timezone	facebook	phone2	name	phone3	phone4	phone5	email	phone1	additional_column
john	Asia/Kolkata	john@domain.com	14679797 9	John	12347978 9			john@domain.com	12345678 91	NA

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

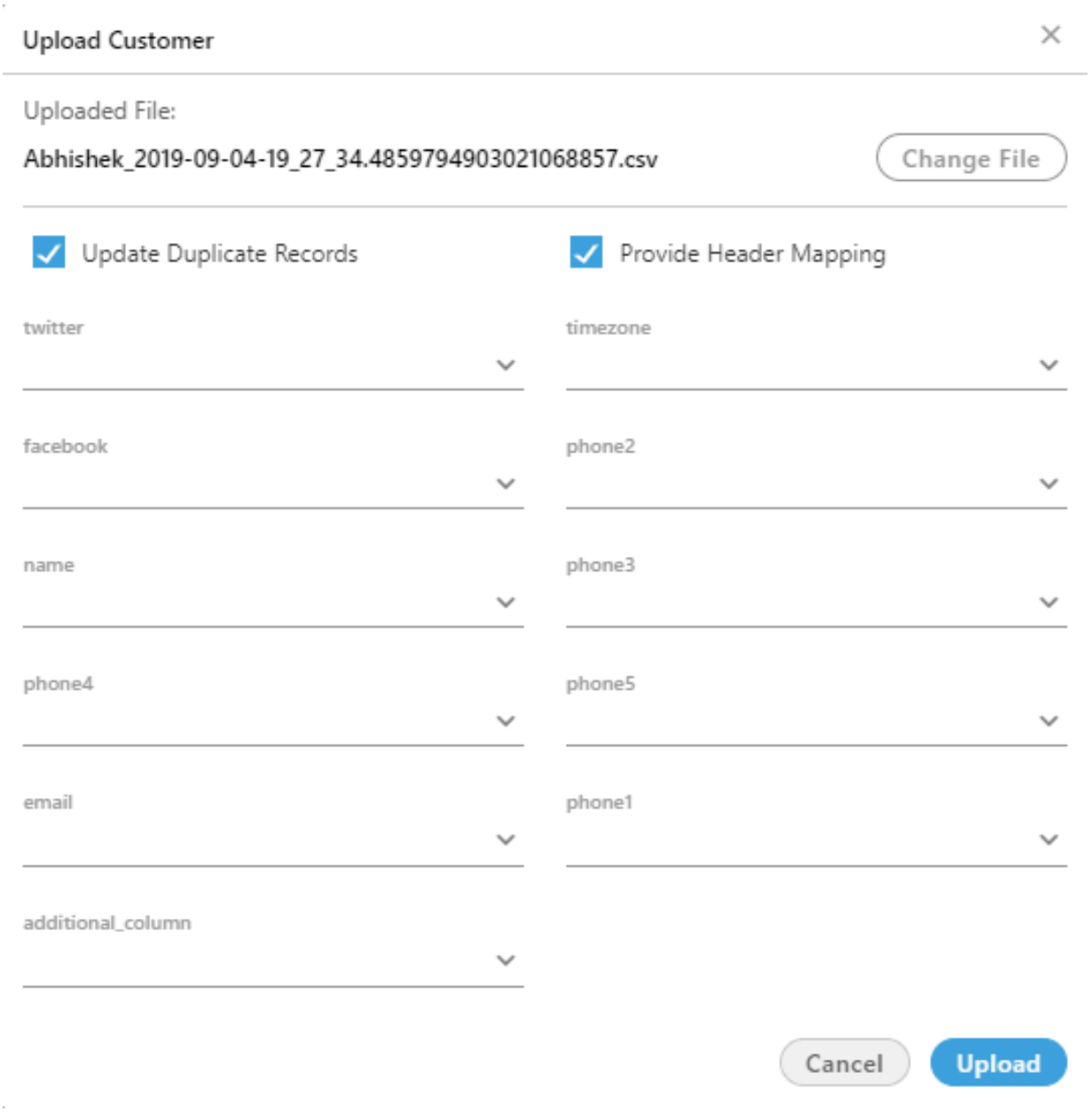


Figure: Map Headers of CSV with Table Definition Fields

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

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

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

- **Export:** Click this button to download the already uploaded Customer Data and save it in CSV file format on the disk.

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

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

1. Click "New Rule" button. The following page is opened.

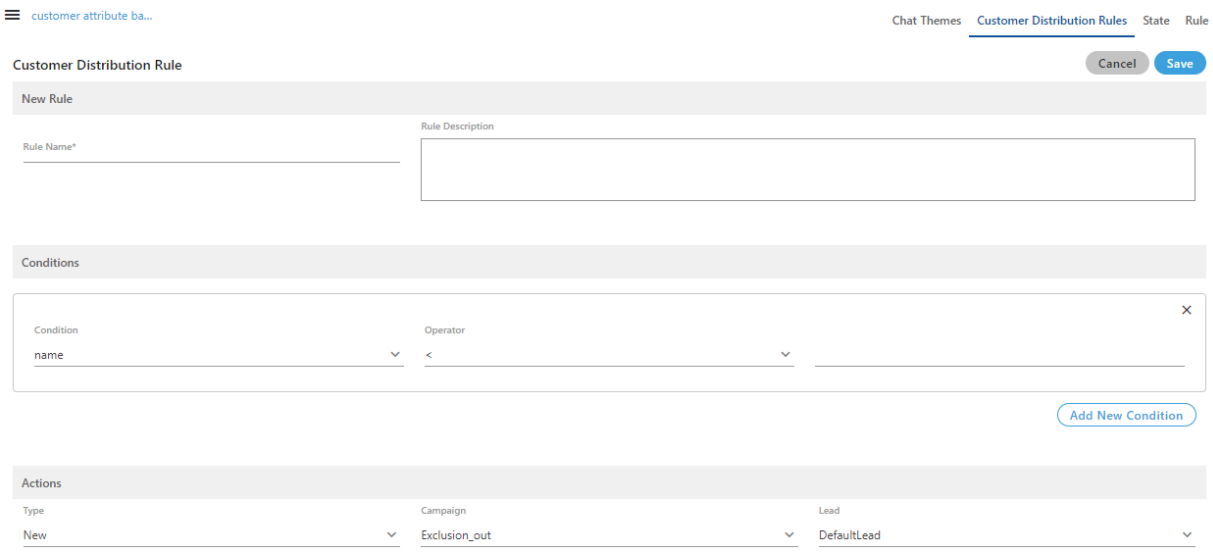


Figure: Create the new Rule

2. Provide the name of the rule in "Rule Name" column, through which you want to create the rule.
3. Enter the description of the rule in "Rule Description" textbox.
4. Click on the "Conditions" tab to provide the conditions. Select any of the following types of the condition from the drop-down list.

- twitter
- timezone
- facebook
- phone2
- name
- phone3
- phone4
- phone5

- email
- phone1

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

- <
- =
- !=
- >

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

> The administrator can provide multiple conditions for the single rule. Click "Add New Condition" button to provide multiple conditions.

E.Action: After providing the condition, now provide the action which will perform when the condition satisfies.

- Select the type of the action from the drop-down list of "Types". The actions available to select are "New," and "Upload".
    - **New:** The "NEW" action creates the new entry according to the condition given above.
    - **Upload:** The action "Upload" performs the following actions.
        1. Create the new customer if the customer matching the rule does not exist. It will update the customer records that are already available for distribution.
        2. Update the customer record that is already available for distribution.
        3. Update and migrate the customer record that is already available in a lead other than specified in the rule.
- Select the campaign on which you want to upload the customer details, from the drop-down list of "Campaigns".

- Select the lead on which you want to upload the data, from the "Lead" drop-down section.

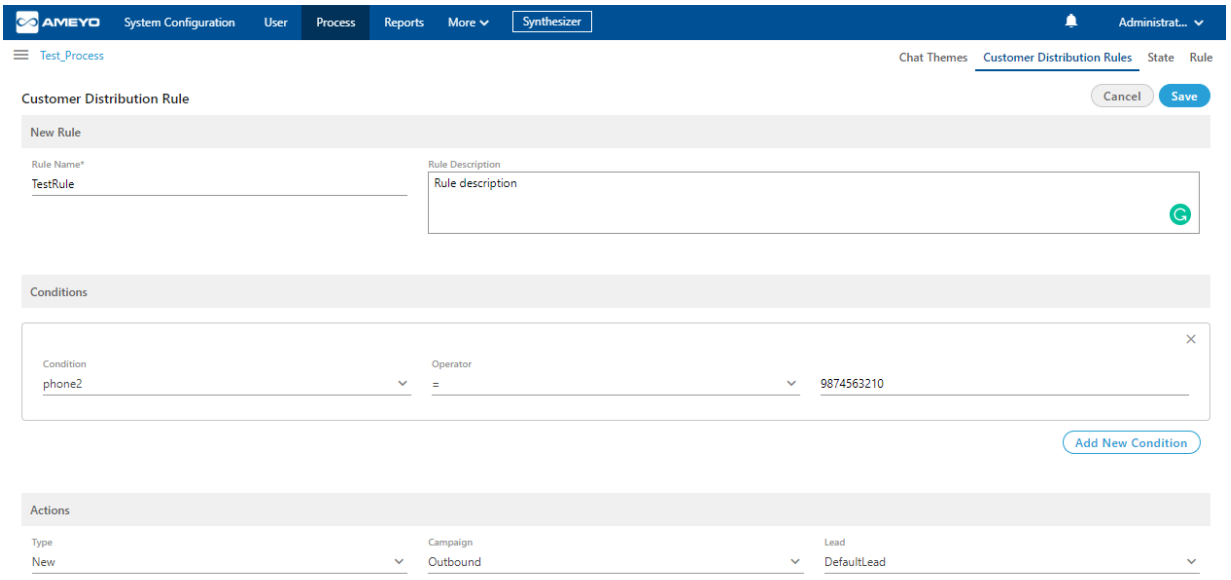


Figure: Sample Rule

F. After providing all the information, click "Save" button to create a new rule. Clicking save button redirects you to the main page of the customer rule.

3. **Edit the Customer Distribution Rule:** The administrator can edit the created rule as well. Click on toggle icon present in the actions column of the rule. The same page is opened as opened at the creation time of the rule.

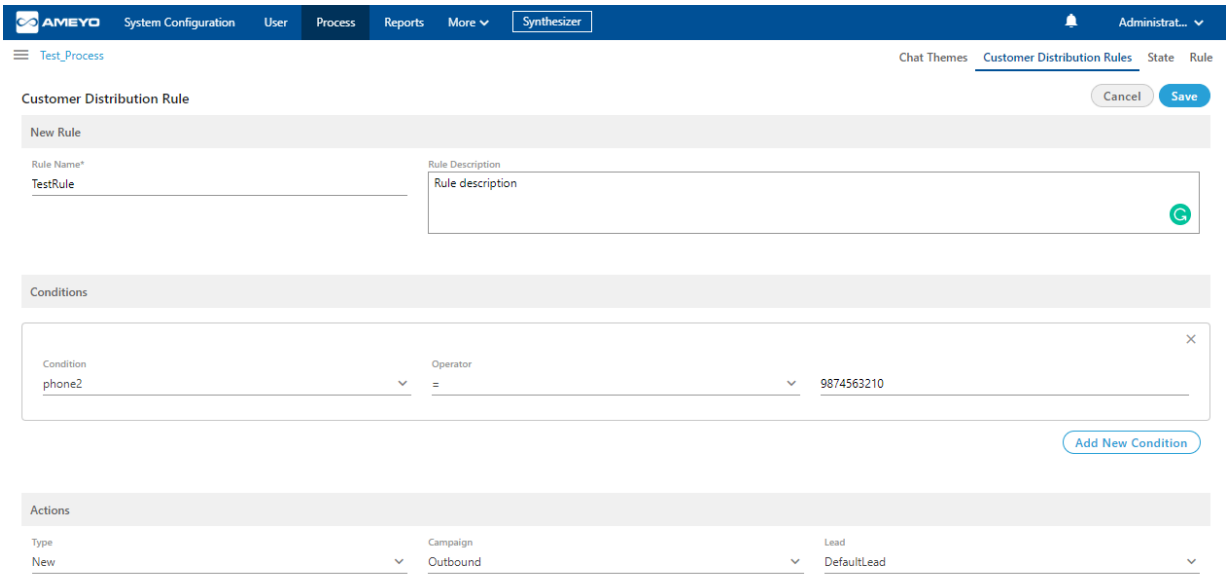


Figure: Edit the Rule

The administrator can change all the information of the rule.

Click "Save" button after editing the rule.

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



Figure: Delete the Rule

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

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

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

5. **Disable the Customer Distribution Rule:** The administrator can disable the enabled rule. Perform the following steps to disable the rule.

- Select the rule, which you want to disable.
- Toggle the  switch present in the status column of the rule to disable the rule.

6. **Enable the Customer Distribution Rule:** The administrator can enable the disabled rule. Perform the following steps to enable the rule.

- Click "View Disabled Rules" checkbox to see the list of the disabled rules.
- Select the rule, which you want to enable.
- Toggle the  switch present in the status column of the rule to enable the rule.

19.1.6.4. PACE State in process settings

Overview: State Tab in Process Settings (Licensable)

The States and Rules tabs in Process Settings are designed to integrate PACE (ProActive Connect Enhancer) with the Ameyo system. PACE acts as a customer provider, and together with Ameyo's Predictive Dialer, it forms the complete PACE Solution. PACE maintains the customer cache from which the dialer picks records for outbound calls.

PACE is used when customer behavior patterns are known in advance. Based on this behavior analysis, specific rules can be created to optimize call strategies and improve overall productivity.

Business Use Cases

1. Connected Success or Connected Fail Division

For a contact center where a connected call represents a sale, some calls may result in dispositions such as FAILED, AMD, or PROVIDER_FAILURE. When PACE is active, the system can be configured not to redial such numbers frequently—or at all—based on predefined rules. This prevents unnecessary retries, saving bandwidth and improving efficiency. Conversely, if required, connected numbers can be prioritized for dialing again.

2. Division Based on Collection Process

In collection or sales workflows, customers move through defined stages such as "Sale Converted," "Payment Done," or "Procure to Pay." Each stage corresponds to a dialing strategy that helps achieve the business objective. These stages can be represented as states within PACE, and transitions between them occur as rules execute.

3. Division Based on Call Timing

If customers typically do not answer in the morning (e.g., while commuting), this data can be used to reschedule calls for more effective times. For example:
If (SYSTEM_DISPOSITION='NO_ANSWER' OR
SYSTEM_DISPOSITION='PROVIDER_TEMP_FAILURE')
then CallAroundTime='05:00:00' and NotCallBefore='04:00:00'.

This enables smarter redial strategies using knowledge of customer availability patterns.

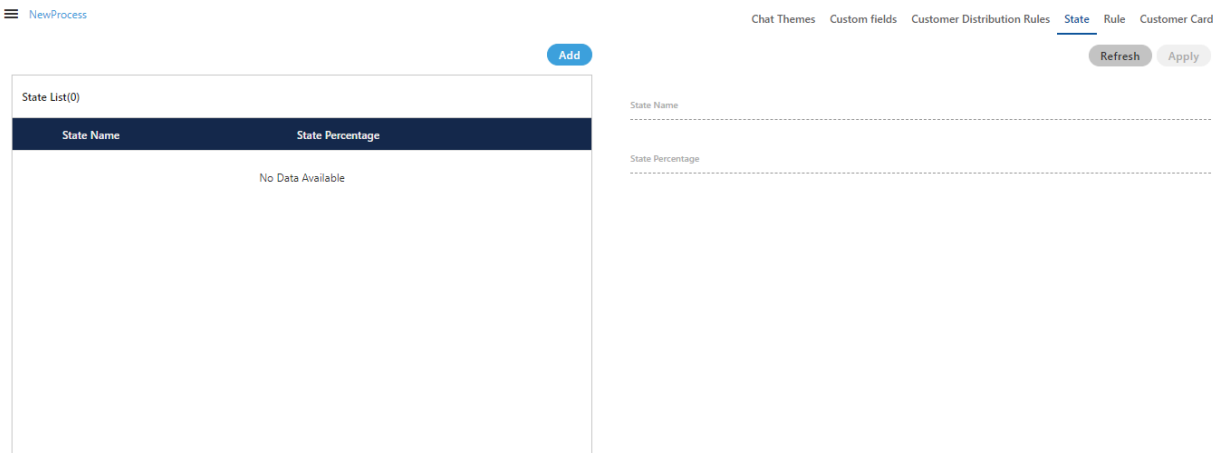
States

In PACE, customers are grouped into *states*, and each state can be assigned a specific dialing percentage. The dialer distributes calls based on these percentages. To enable PACE in Ameyo, three default states must be created:

- **freshNumber** – Represents newly uploaded contact numbers
- **catNumber** – Represents numbers with a defined Call Around Time (CAT), such as preferred contact hours
- **ns** – Represents numbers without a defined Call Around Time

To activate PACE, ensure that “PACE Based Customer Provider” is selected in the settings of a Parallel Predictive Campaign.

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



Add a State

To create a new state:

1. Click **Add** in the State tab.

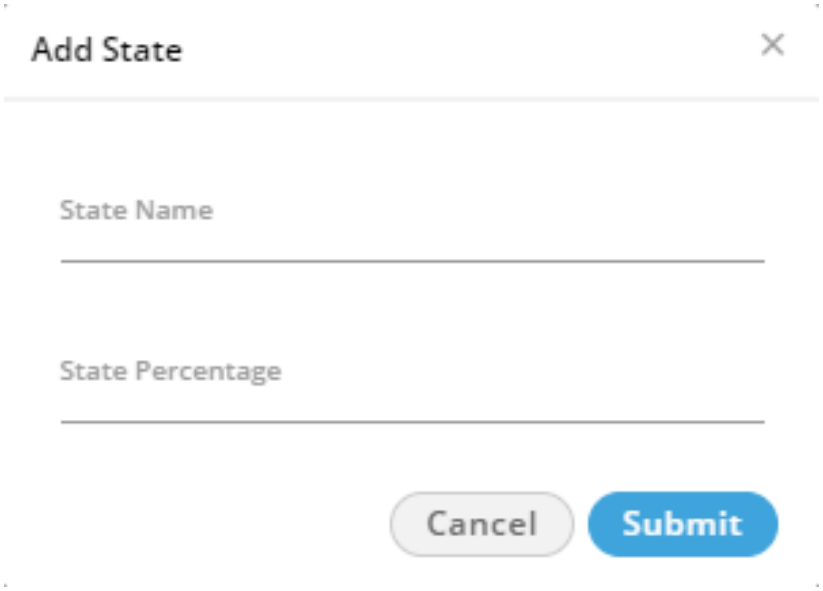


Figure: Add a State

2. In the pop-up window, enter the **State Name**.
3. Specify the **Dialing Percentage** for the state.
4. Ensure the total percentage across all states does not exceed 100.
5. Create multiple states as needed, distributing up to 100% among them.

Default States

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

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

Modify a State

To modify an existing state:

1. Select the state from the list to display its details in the right section.

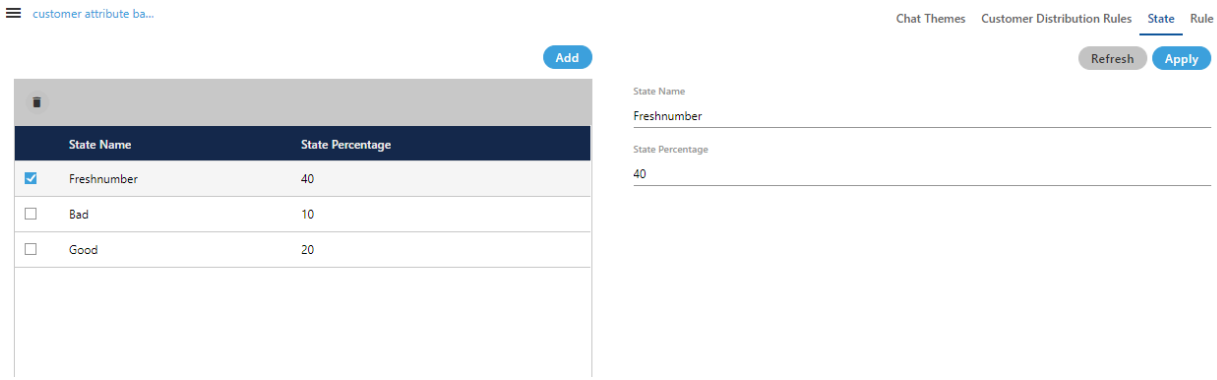


Figure: Details of a State

2. Update the **State Name** or **State Percentage** as required.

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

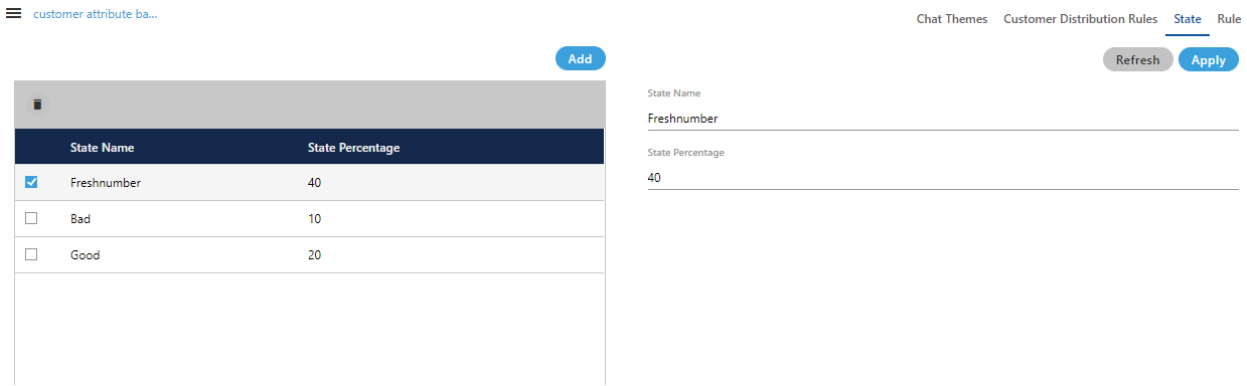
3. Click **Apply** to save the changes, or **Refresh** to discard them.

Delete a State

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

To delete a state:

1. Select the state you wish to remove.



2. Click the **Delete** icon.

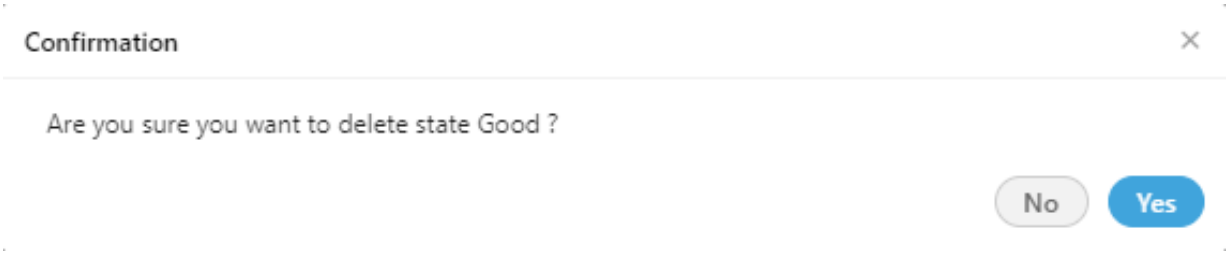


Figure: Warning before deleting a State

3. Review the warning message displayed.
4. Click **Yes** to confirm and permanently delete the state.

19.1.6.5. PACE Rule in process settings

Overview: Rule Tab for PACE in System Settings (Licensable)

Rule Tab in System Settings allows the Administrator to create the rule for the PACE.

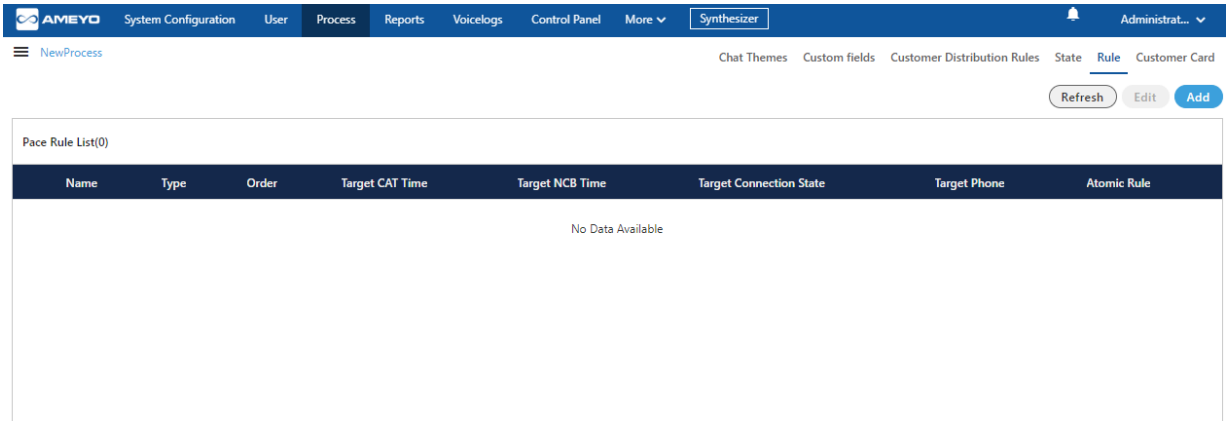


Figure: Rule Tab to Manage PACE

Add a PACE Rule

Perform the following steps to add a PACE Rule.

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



Figure: Pop-up to add a Rule

2. Provide a name for the rule.
3. Provide the order of execution in numbers.

4. (Optional)CAT Time: Provide the target CAT (Call Around Time) in HH:MM:SS format. The call will be made to the customers only during this time.

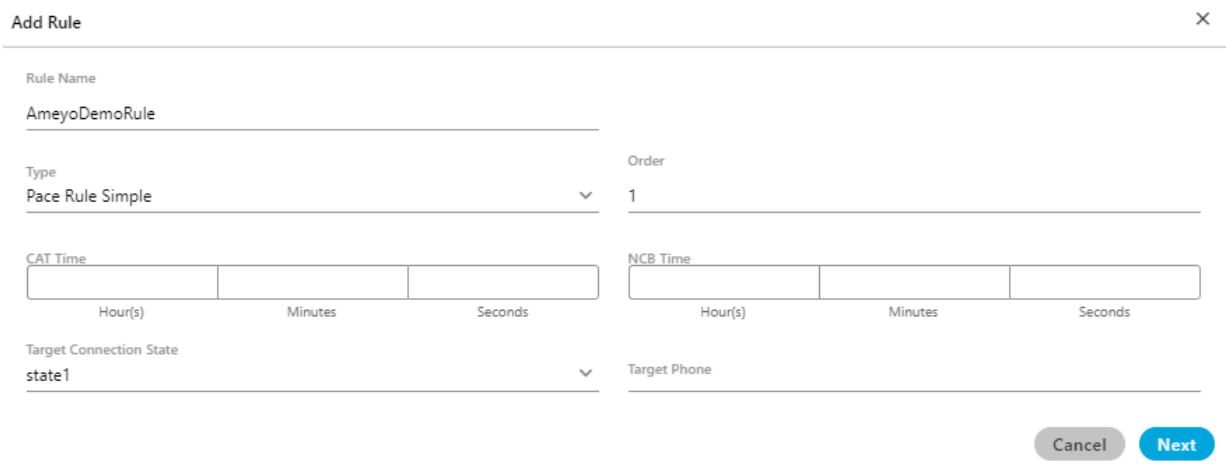


Figure: Optional Date and Time Field

Suppose a case where three different PACE states such as "state1", "state2", and "state3" have been created. After calling, the customer (say C1) is moved to from "state1" to "state2". If the PACE rule is applied again on the same customer (C1), then the customer will move from "state2" to "state3". But, if the Administrator wants to change the state of the customer (C1) back to "state1" from "state2" or "state3", then the Administrator has to create the rule and provide "0" (zero) values in both CAT and NCB fields.

Instead of adding zero as value, these fields should remain blank to decrease the unnecessary manual inputs.

To meet this requirement, the CAT and NCB fields in the PACE rules have made optional fields instead of being mandatory. (*) symbol with these fields have also been removed.

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

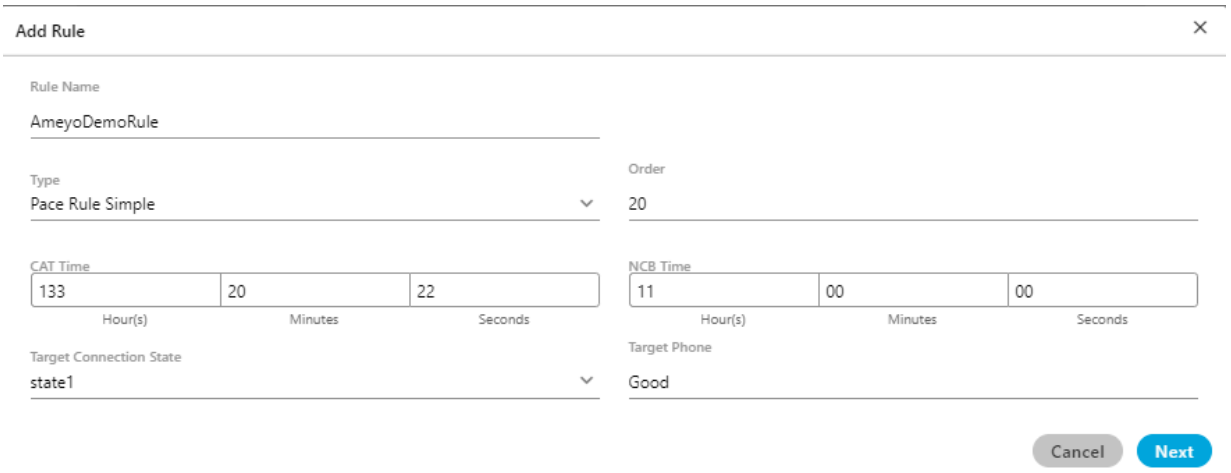


Figure: Sample Details

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

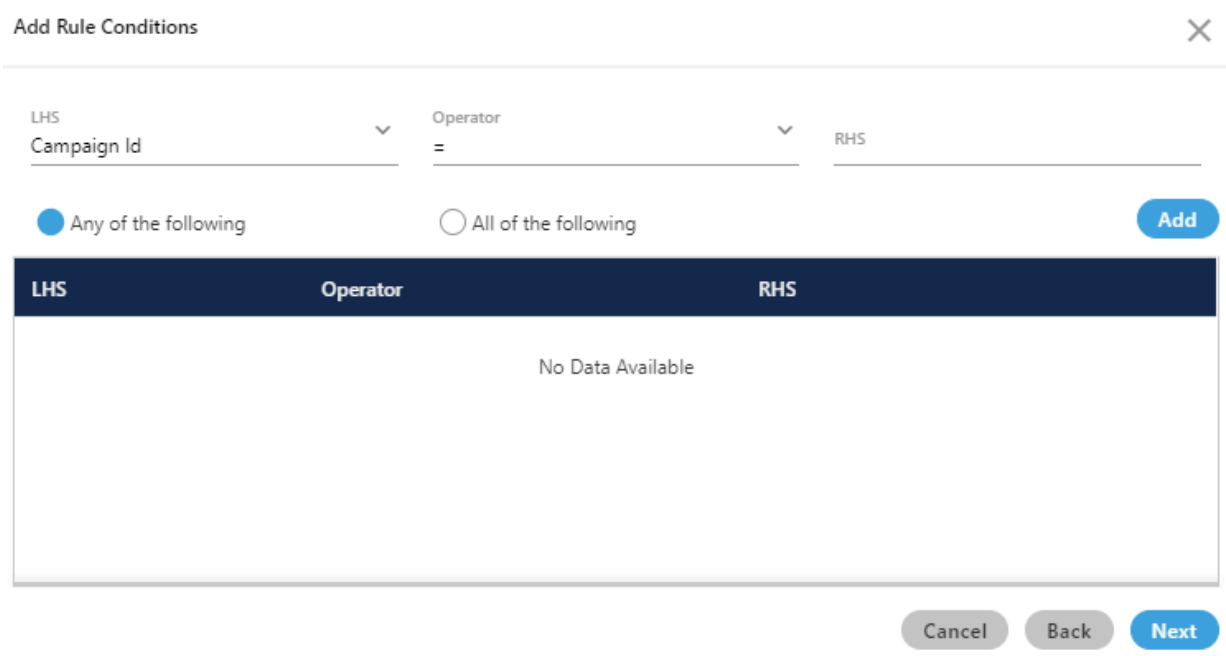


Figure: Add Condition

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

9. In "LHS" drop-down menu, select any of the following values.
    - System Disposition
    - Disposition Code
    - Disposition Class
    - Last Status
    - Last Disposition

- Last Dialed Time
- CAT Time
- NCB Time
- Connection State
- Campaign ID

10. Select any of the following operators.
    - =
    - <>
    - <=
    - >=
11. Provide the corresponding value for any selected "LHS" condition in "RHS" text field.
12. Click "Add" to add the rule.
13. You can add multiple rules here. To manage them, you can select any of the following options.
    - **Any of the following:** Select this option to run the rule when any of the selected conditions are matched.
    - **All of the following:** Select this option to run the rule only when all of the selected conditions are matched.

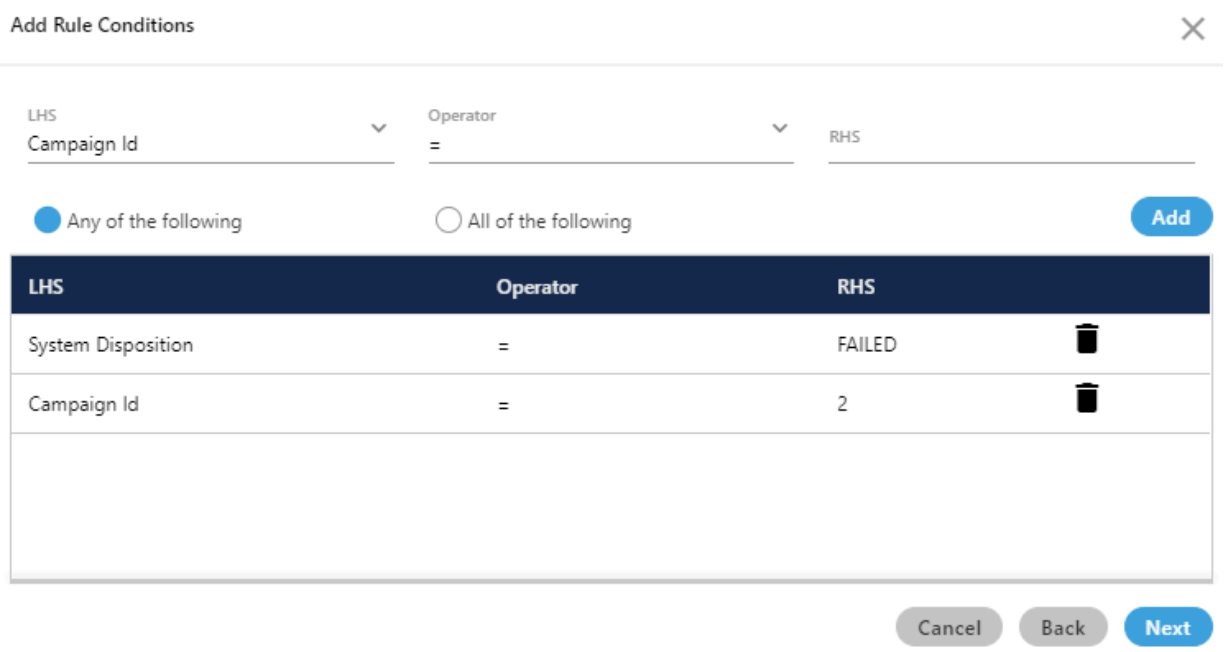


Figure: Add Conditions

You can click on delete icon to delete any rule.

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



Figure: Select an Action

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

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

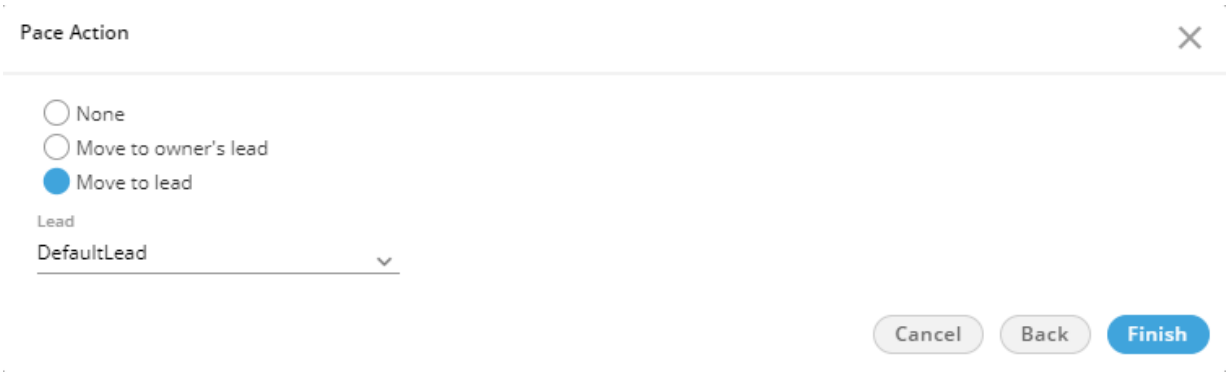


Figure: Selected to move State (Group of Numbers) to the selected lead

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

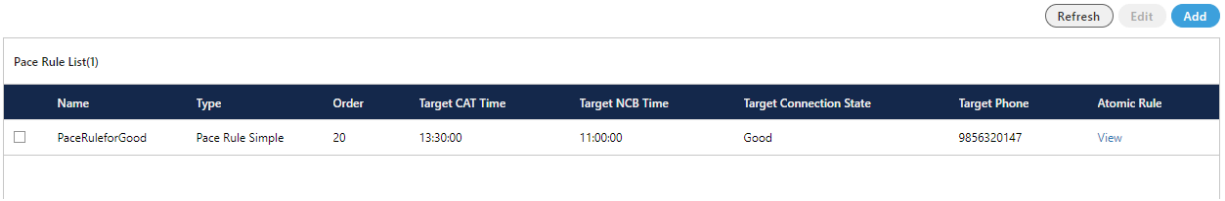


Figure: List of State Rules

Modify a PACE Rule

Perform the following steps to modify a PACE Rule.

1. Select a PACE Rule which you want to modify, and click "Edit" button.
2. The information of the selected rule is visible on the same modal which was used to create the rule.
3. Here, you can change the State Name and the State Percentage as well.



Figure: Modify PACE Rule

Delete a PACE Rule

Perform the following steps to delete a PACE Rule

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

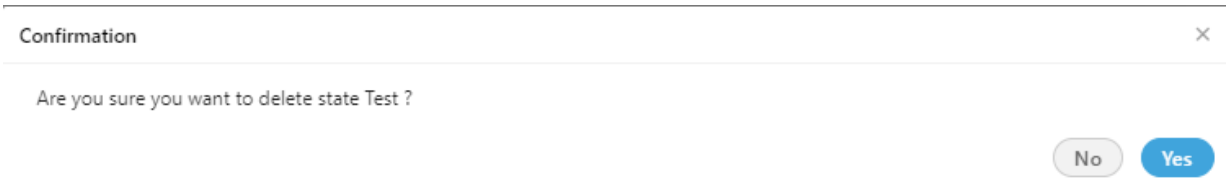


Figure:Delete PACE Rule

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

19.1.6.6. Customer Card in process settings

"Customer Card" Tab in Process Settings allows the Administrator to configure the layout of Customer Cards.

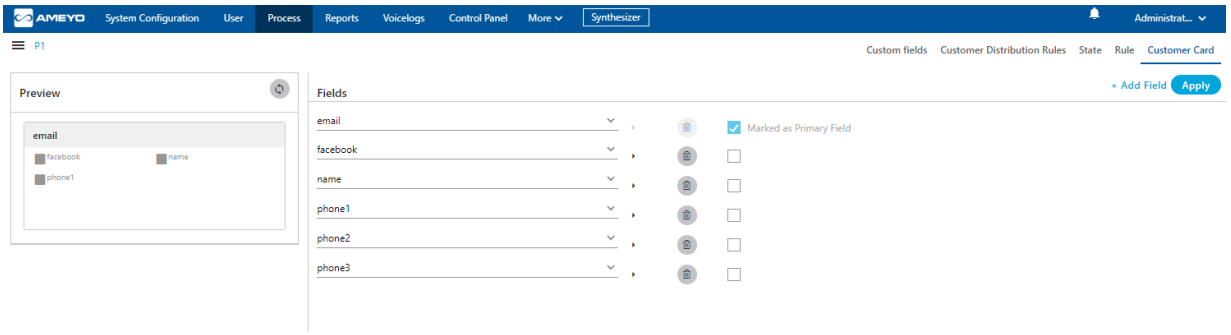


Figure: Customer Card Tab

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

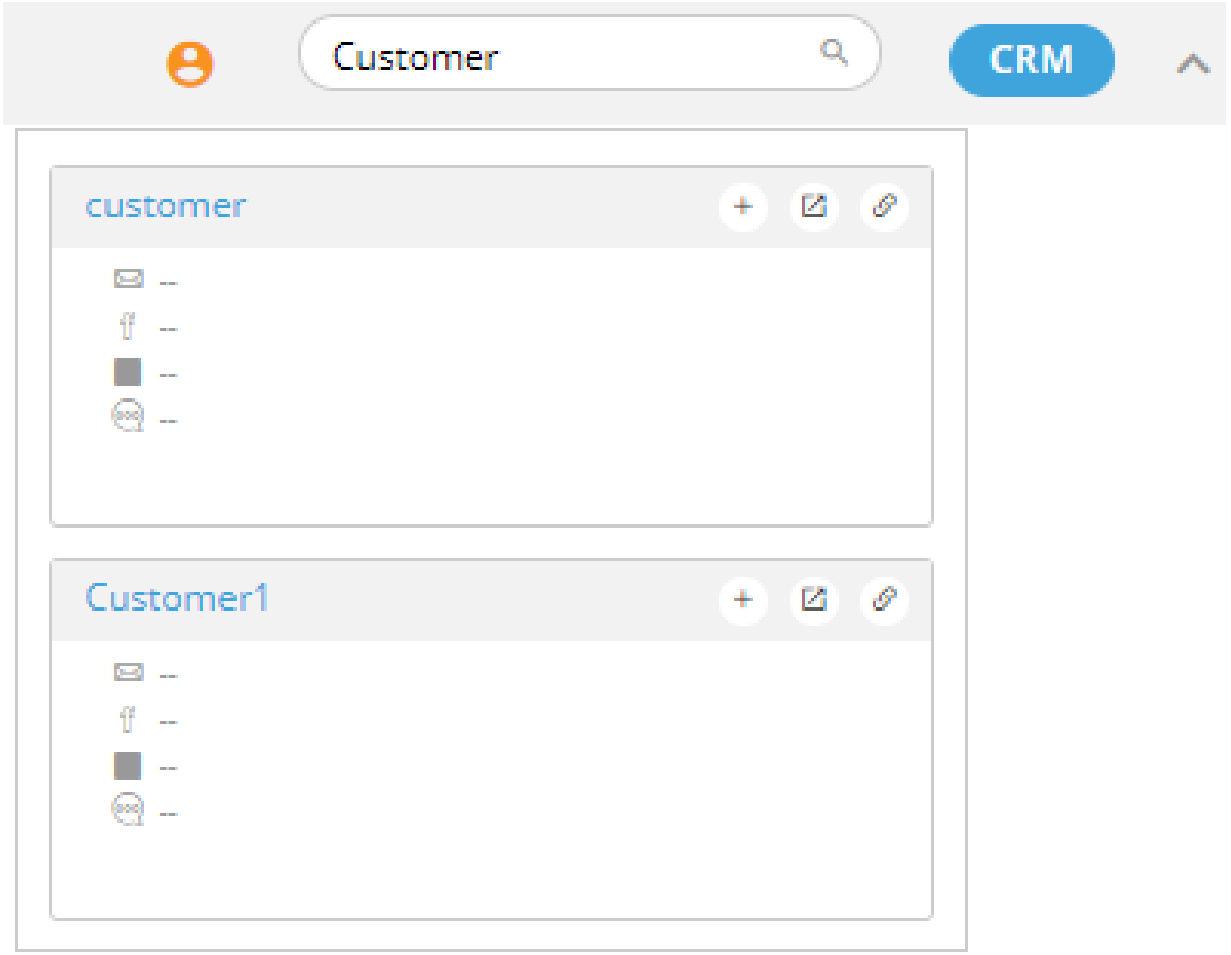


Figure: Displaying Customer Cards in Search

Default Fields

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

Default Values for Fields

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

- name
- email
- facebook
- phone1
- phone2
- phone3
- phone4
- phone5
- timezone
- twitter

Here, you can perform the following operations.

Add a Field

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

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

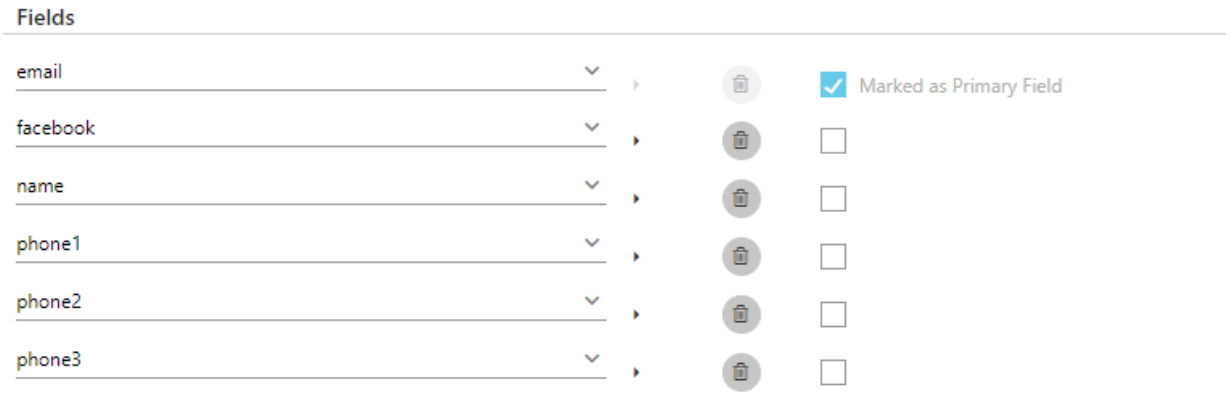


Figure: Add Customer Card

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

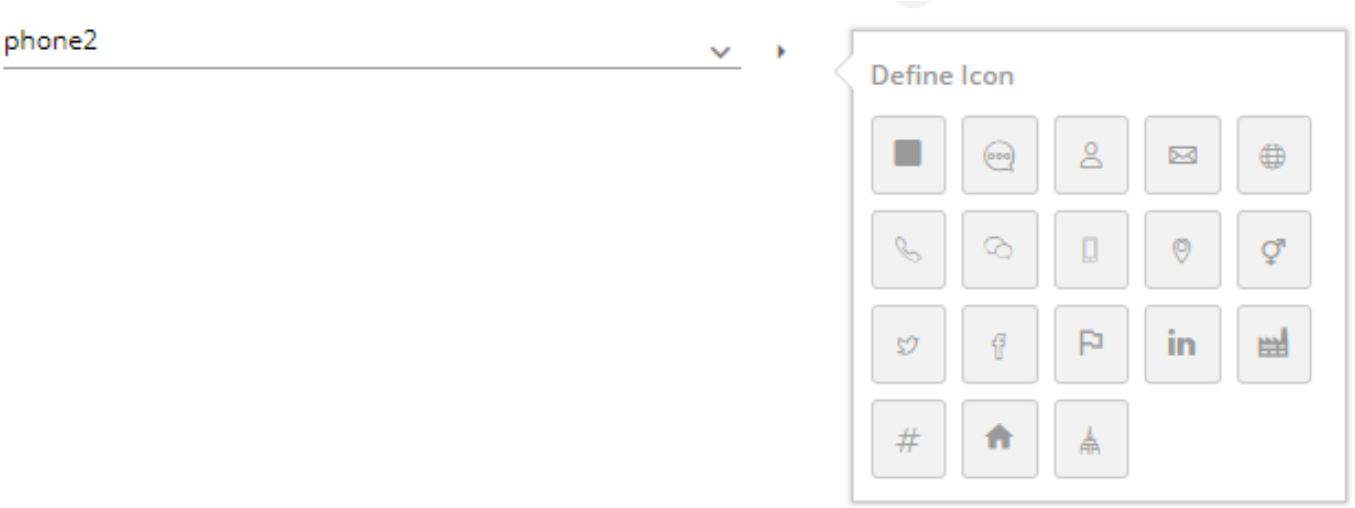


Figure: Select an icon

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

Make Primary Field

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

Edit a Field

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

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

Delete a Field

Click on delete icon to delete any field.

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

Sample Customer Card

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

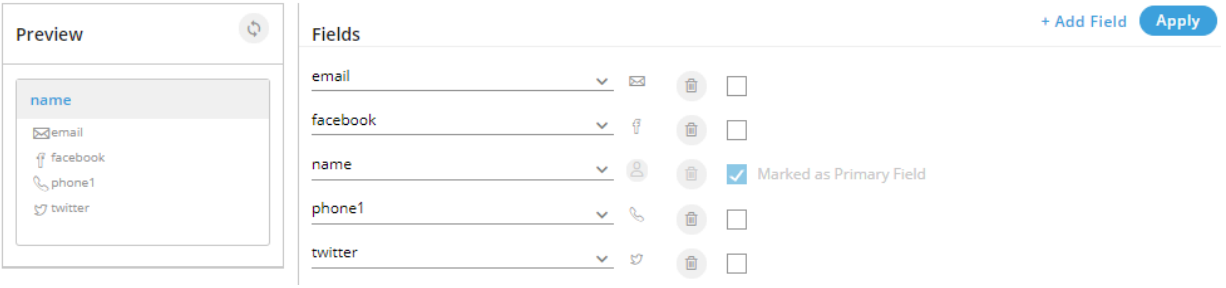


Figure: Modified Customer Card

19.1.7. Campaign Configuration

Create a Campaign

Perform the following steps to create a new campaign.

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

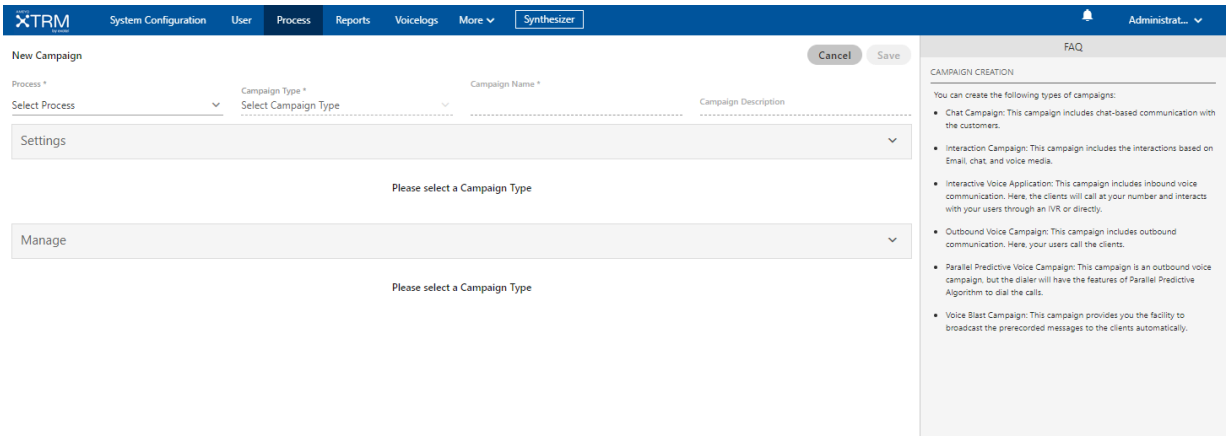


Figure: Create New Campaign

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

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

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

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

2. Interaction Campaign: This campaign includes the interactions based on Email and chat applications included in the selected Chat Campaign.
3. Interactive Voice Application: This campaign includes inbound voice communication. Here, the clients will call at your number and interacts with your users through an IVR or directly.
4. Outbound Voice Campaign: This campaign includes outbound communication. Here, your users call the clients.
5. Video Chat Campaign: This campaign includes video chat communication. In this campaign, the users will be able to recieve and attend the video calls initiated by the customers..
6. Parallel Predictive Voice Campaign: This campaign is an outbound voice campaign, but the dialer will have the features of Parallel Predictive Algorithm to dial the calls.
7. Voice Blast Campaign: This campaign provides you the facility to broadcast the prerecorded messages to the clients automatically.

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

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

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

1. Preview URL: Provide the preview URL. If you are using Ameyo CRM, then following will be the preview URL: http://<Server_IP>:8786/<CRM_Name>/preview.php

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

2. CRM URL: Provide the CRM URL. If you are using Ameyo CRM, then following will be the CRM URL: http://<Server_IP>:8786/<CRM_Name>/customer.php

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

3. Disposition URL: Provide the Disposition URL. If you are using Ameyo CRM, then following will be the Disposition URL: http://<Server_IP>:8786/<CRM_Name>/disposition.php

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

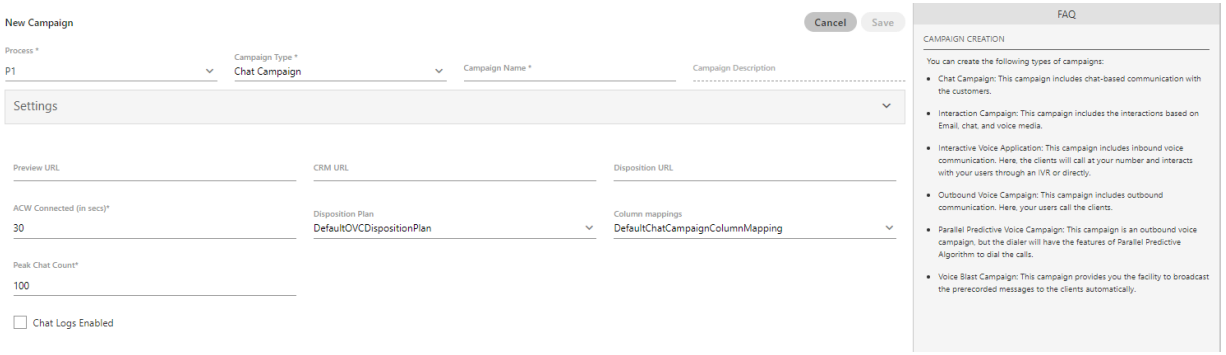


Figure: Creating New Chat Campaign

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

- DefaultAOVCDispositionPlan

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

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

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

> We support only one Interaction Campaign. It is advised to create multiple queues in IC to address the different functions of the business requirements (like sales, and support). However, the Queue Monitoring is not available in IC.
>
> Ticket will be created only in Interaction Campagin and not in other campaigns. If you want to create tickets for any Voice Campaign, you need to create this campaign also. It is mandatory to create and force users to use both Interaction and Chat Campaigns together.

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

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

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

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

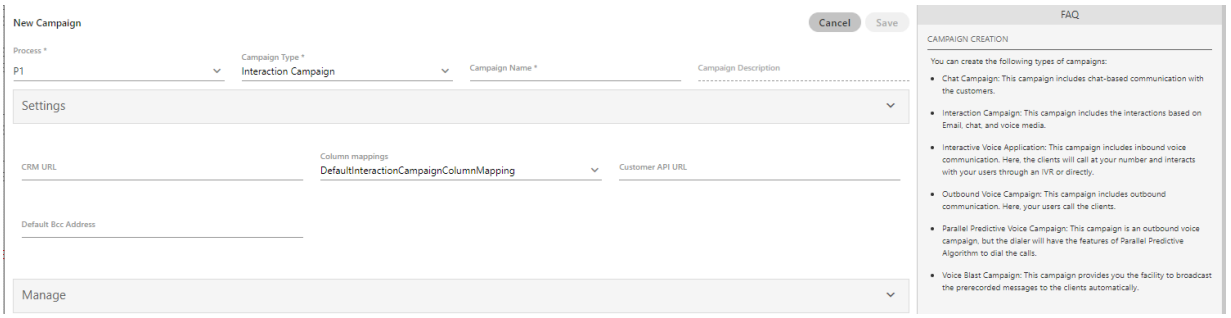


Figure: Creating New Interaction Campaign

3. Customer API URL: If you want to use a third-party API within this campaign, provide the URL of the third-party API.
4. Default BCC Address: Provide the email address to which all emails be sent by default through BCC.

C. **Interactive Voice Application:** Provide the following inputs to create an interactive voice application campaign.

1. Preview URL: Provide the preview URL. If you are using Ameyo CRM, then following will be the preview URL: http://<Server_IP>:8786/<CRM_Name>/preview.php

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

1. CRM URL: Provide the CRM URL. If you are using Ameyo CRM, then following will be the CRM URL: http://<Server_IP>:8786/<CRM_Name>/customer.php

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

1. Disposition URL: Provide the Disposition URL. If you are using Ameyo CRM, then following will be the Disposition URL: http://<Server_IP>:8786/<CRM_Name>/disposition.php

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

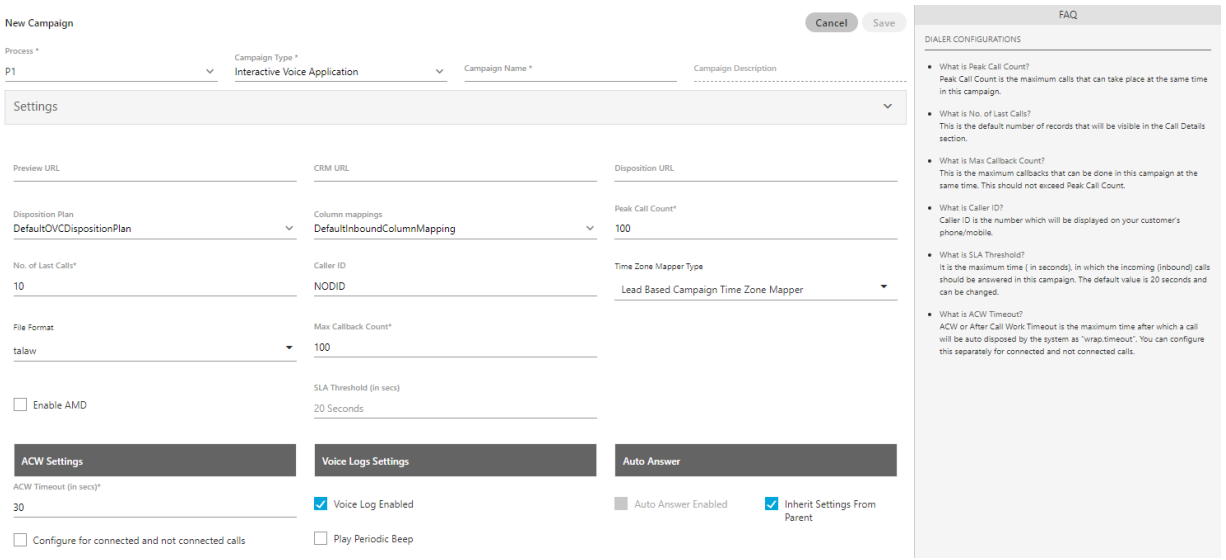


Figure: Creating New Interactive Voice Application Campaign

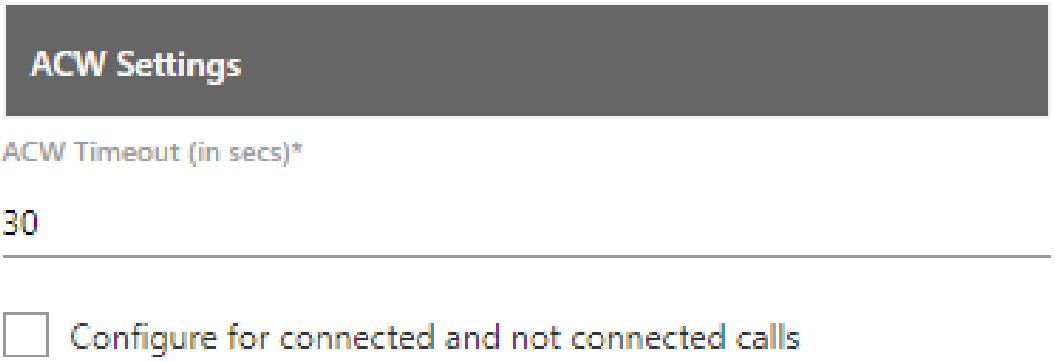
4. Disposition Plan: Select any of the following disposition plans.
    - DefaultOVCDispositionPlan
    - DefaultIVADispositionPlan
    - DefaultVBCDispositionPlan
    - DefaultCCDispositionPlan
    - DefaultIVRCDispositionPlan
    - DefaultCSTACDispositionPlan
    - DefaultAOVCDispositionPlan
5. Column Mapping: It shows the default and custom column mappings. You can select any one.
6. Peak Call Count: Peak Call Count is the maximum calls that can take place at the same time in this campaign.
7. No. of Last Calls: Provide the maximum number of last calls.
8. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.
9. Time Zone Mapper Type: Select any of the following time zone mapper types, which allows you to map the time zones.
    - **Lead Based Campaign Time Zone Mapper:** In this case, the time zone of the customer is specified from the time zone set in the lead settings.

- **Default Campaign Time zone Mapper:** In this case, time zone is determined from customer data. We get the time zone info from the column specified against time zone column mapping in the campaign.
- **Phone Pattern Based Campaign Time zone Mapper:** It is related to number management in Ameyo. With phone pattern based campaign time zone mapper, country code and area code can be mapped to a time zone and all numbers with that country code and area code will be dialed according to that time zone restriction/criteria.
- **State Based Campaign Time zone Mapper:** It is related to number management in Ameyo. With state based campaign time zone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialed according to its time zone restriction/criteria.

10. File Format: Select any of the following file formats in which the voice recordings will be saved.
    - talaw
    - tulaw
    - tgsm
    - tg729
    - alaw
11. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.
12. Enable AMD: AMD stands for Answering Machine Detection. Check this box to enable the detection of answering machines when the auto-dialer makes the outbound calls automatically.
13. SLA Threshold: Here, you can define the SLA Threshold, in which the incoming (inbound) calls should be answered in this campaign. The default value is 20 seconds, but it can be changed here.
14. ACW Settings: Here, you can apply the ACW Timeout Settings. A textbox named "ACW Timeout (in sec)", which is a mandatory field while creating or modifying the campaign. The Administrator have to provide the value between 1 and 3600 seconds, which is the duration in which the call (after disconnection) should be disposed of or wrapped. Here, you can configure this option for both "Connected Calls" (calls which are connected with

both customer and agent) and "Not Connected Calls" (calls which cannot be connected with either agent, or customer, or both). Perform the following steps here.

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



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

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

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

17. **Inherit Settings from Parent**: Check this box to inherit the settings from the parent, that is, from the system settings. It means that, if the settings in the system is enabled to the auto-answer then, auto-answer setting will be same for the campaign. You can disable the auto-answer settings from here, as well.

D. Outbound Voice Campaign: Provide the following inputs to create an outbound voice campaign.

1. Preview URL: Provide the preview URL. If you are using Ameyo CRM, then following will be the preview URL http://<Server_IP>:8786/<CRM_Name>/preview.php

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

2. CRM URL: Provide the CRM URL. If you are using Ameyo CRM, then following will be the CRM URL: http://<Server_IP>:8786/<CRM_Name>/customer.php

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

3. Disposition URL: Provide the Disposition URL. If you are using Ameyo CRM, then following will be the Disposition URL: http://<Server_IP>:8786/<CRM_Name>/disposition.php

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

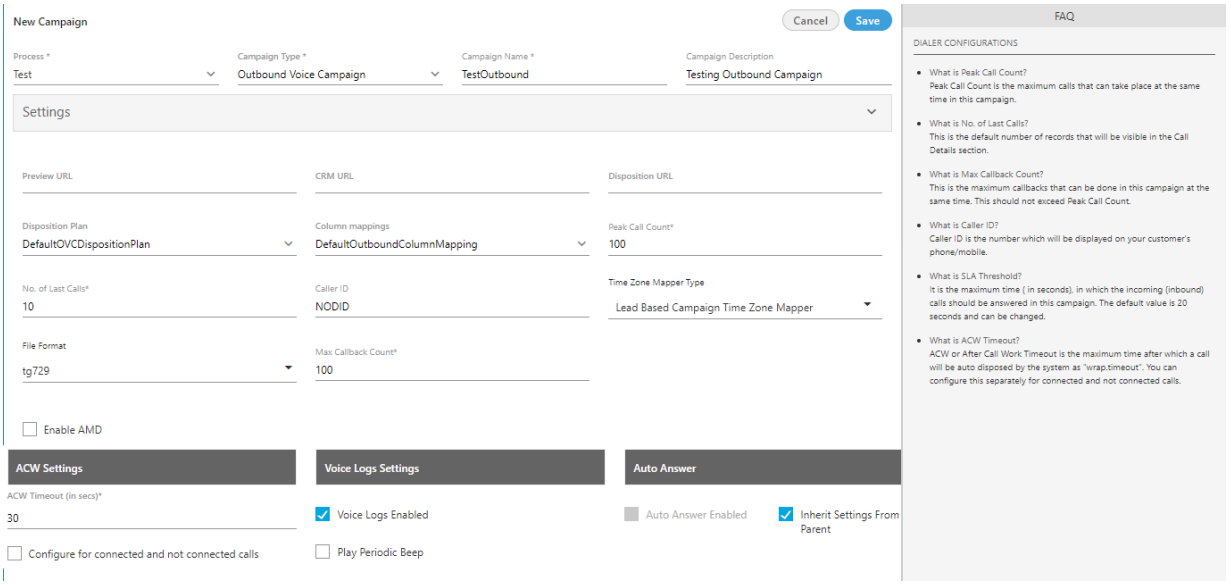


Figure: Creating New Outbound Voice Campaign

1. Disposition Plan: Select any of the following disposition plans.
    - DefaultOVCDispositionPlan
    - DefaultIVADispositionPlan

- DefaultVBCDispositionPlan
- DefaultCCDispositionPlan
- DefaultIVRCDispositionPlan
- DefaultCSTACDispositionPlan
- DefaultAOVCDispositionPlan

2. Column Mapping: It shows the default and custom column mappings. You can select any one.
3. Peak Call Count: Peak Call Count is the maximum calls that can take place at the same time in this campaign.
4. No. of Last Calls: Provide the maximum number of last calls.
5. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.
6. Time Zone Mapper Type: Select any of the following time zone mapper types, which allows you to map the time zones.
    - **Lead Based Campaign Time Zone Mapper:** In this case, time zone of the customer is specified from the time zone set in the lead settings.
    - **Default Campaign Time zone Mapper:** In this case time zone is determined from customer data. We get the time zone info from the column specified against time zone column mapping in the campaign.
    - **Phone Pattern Based Campaign Time zone Mapper:** It is related to number management in Ameyo. With phone pattern based campaign time zone mapper, country code and area code can be mapped to a time zone and all numbers with that country code and area code will be dialed according to that time zone restriction/criteria.
    - **State Based Campaign Time zone Mapper:** It is related to number management in Ameyo. With state based campaign time zone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialed according to its time zone restriction/criteria.
7. File Format: Select any of the following file formats in which the voice recordings will be saved.
    - talaw
    - tulaw

- tgsm
- tg729
- alaw

8. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.
9. Enable AMD: AMD stands for Answering Machine Detection. Check this box to enable the detection of answering machines when the auto-dialer makes the outbound calls automatically.
10. ACW Settings: Here, you can apply the ACW Timeout Settings. A textbox named "ACW Timeout (in sec)", which is a mandatory field while creating or modifying the campaign. The Administrator have to provide the value between 1 and 3600 seconds, which is the duration in which the call (after disconnection) should be disposed of or wrapped. Here, you can configure this option for both "Connected Calls" (calls which are connected with both customer and agent) and "Not Connected Calls" (calls which cannot be connected with either agent, or customer, or both). Perform the following steps here.
    1. If you want to configure same ACW Timeout value for both Connected and Not Connected Calls, then just enter the timeout value.
    2. If you want to configure different ACW Timeout value for Connected and Not Connected Calls, then check the box titled "Configure for Connected and Not Connected Calls". Once checked, it shows the different textboxes at the bottom.

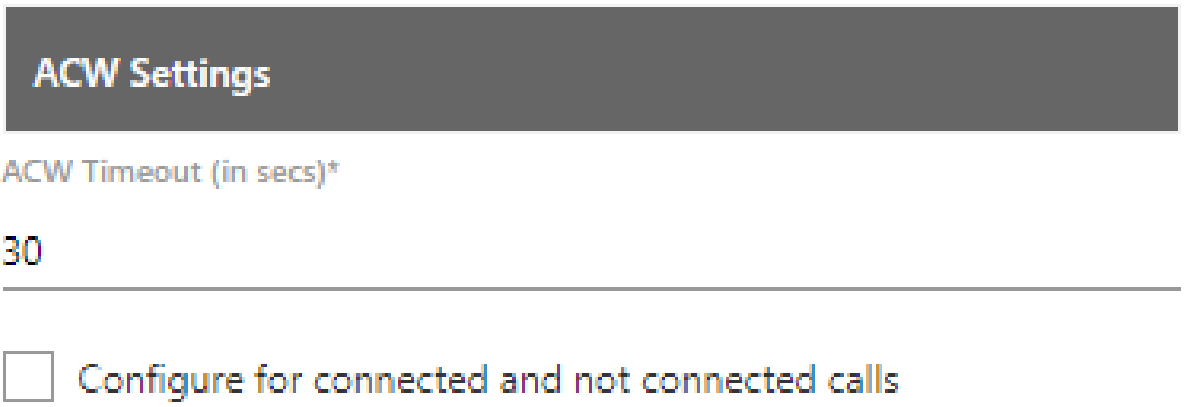


Figure: ACW Timeout

If you are enabling the option to give separate timeout values for Connected and Not Connected Calls, then their values should be different else the Ameyo System will not accept

them. If both values are kept same, then the selection of "Configure for Connected and Not Connected Calls" will be undone.

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

11. **Voice Logs Settings:** Here, you can manage the settings related to the Voicelogs.
    1. **Voice Logs Enabled**: Check this box to enable the logging of voice logs. However, you can uncheck it to disable the voice logs.
    2. **Play Periodic Beep**: Check this box to play a beep periodically during the call to notify the caller that the call is being recorded. After checking it, you can specify the interval in seconds after which the beep will be played.
12. **Auto Answer Enabled**: Check this box to enable the auto answer of the call for the campaign. This check box will be remained disabled, if the Auto-Answer setting is not enabled in the system settings.
13. **Inherit Settings from Parent**: Check this box to inherit the settings from the parent, that is, from the system settings. It means that, if the settings in the system is enabled to the auto-answer then, auto-answer setting will be same for the campaign. You can disable the auto-answer settings from here, as well.

Parallel Predictive Voice Campaign: Provide the following inputs to create a voice campaign that will be equipped with the features of Predictive Dialing Algorithm.

1. Preview URL: Provide the preview URL. If you are using Ameyo CRM, then following will be the preview URL.http://<Server_IP>:8786/<CRM_Name>/preview.phpReplace <Server_IP> with the IP Address of your computer where CRM is installed.
2. CRM URL: Provide the CRM URL. If you are using Ameyo CRM, then following will be the CRM URL.http://<Server_IP>:8786/<CRM_Name>/customer.phpReplace <Server_IP> with the IP Address of your computer where CRM is installed.
3. Disposition URL: Provide the Disposition URL. If you are using Ameyo CRM, then following will be the Disposition URL.http://<Server_IP>:8786/<CRM_Name>/disposition.phpReplace <Server_IP> with the IP Address of your computer where CRM is installed.

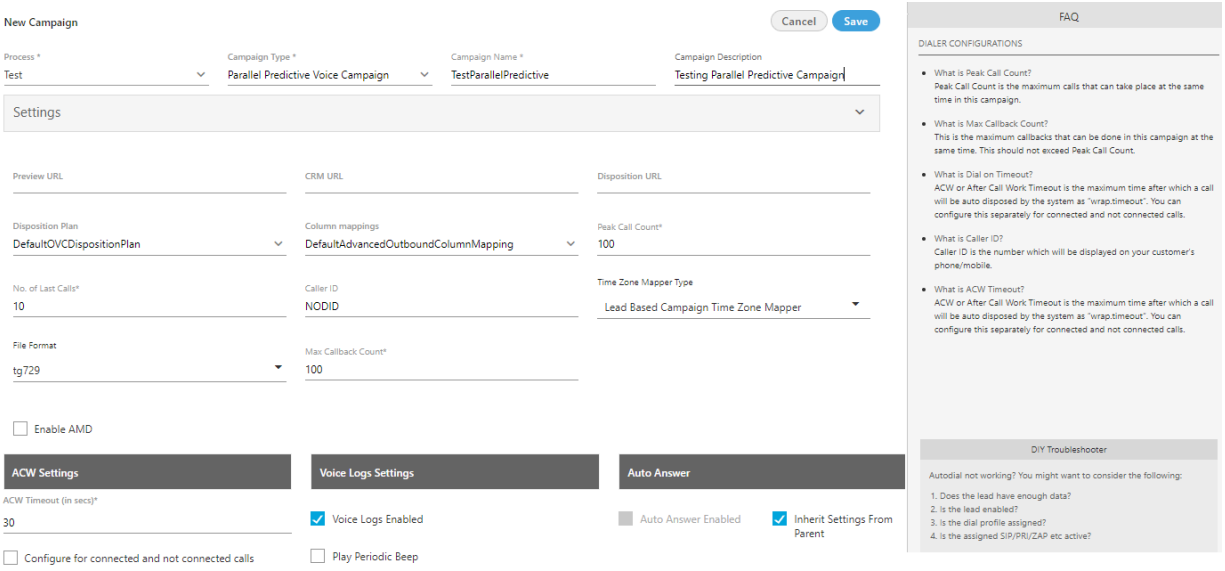


Figure: Creating New Parallel Predictive Voice Campaign

1. Disposition Plan: Select any of the following disposition plans.
    - DefaultOVCDispositionPlan
    - DefaultIVADispositionPlan
    - DefaultVBCDispositionPlan
    - DefaultCCDispositionPlan
    - DefaultIVRCDispositionPlan
    - DefaultCSTACDispositionPlan
    - DefaultAOVCDispositionPlan
2. Column Mapping: It shows the default and custom column mappings. You can select any one.
3. Peak Call Count: Peak Call Count is the maximum calls that can take place at the same time in this campaign.
4. No. of Last Calls: Provide the maximum number of last calls.
5. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.
6. Time Zone Mapper Type: Select any of the following time zone mapper types, which allows you to map the time zones.
    - **Lead Based Campaign Time Zone Mapper:** In this case, time zone of the customer is specified from the time zone set in the lead settings.

- **Default Campaign Time zone Mapper:** In this case time zone is determined from customer data. We get the time zone info from the column specified against time zone column mapping in the campaign.
- **Phone Pattern Based Campaign Time zone Mapper:** It is related to number management in Ameyo. With phone pattern based campaign time zone mapper, country code and area code can be mapped to a time zone and all numbers with that country code and area code will be dialed according to that time zone restriction/criteria.
- **State Based Campaign Time zone Mapper:** It is related to number management in Ameyo. With state based campaign time zone mapper, users are grouped as per their states mentioned in their details and all numbers with the same state will be dialed according to its time zone restriction/criteria.

7. File Format: Select any of the following file formats in which the voice recordings will be saved.
    - talaw
    - tulaw
    - tgsm
    - tg729
    - alaw
8. Maximum Callback Count: Provide the maximum number of callbacks, which can be made by a user.
9. Enable AMD: AMD stands for Answering Machine Detection. Check this box to enable the detection of answering machines when the auto-dialer makes the outbound calls automatically.
10. ACW Settings: Here, you can apply the ACW Timeout Settings. A textbox named "ACW Timeout (in sec)", which is a mandatory field while creating or modifying the campaign. The Administrator have to provide the value between 1 and 3600 seconds, which is the duration in which the call (after disconnection) should be disposed of or wrapped. Here, you can configure this option for both "Connected Calls" (calls which are connected with both customer and agent) and "Not Connected Calls" (calls which cannot be connected with either agent, or customer, or both). Perform the following steps here.
    1. If you want to configure same ACW Timeout value for both Connected and Not Connected Calls, then just enter the timeout value.

2. If you want to configure different ACW Timeout value for Connected and Not Connected Calls, then check the box titled "Configure for Connected and Not Connected Calls". Once checked, it shows the different textboxes at the bottom.

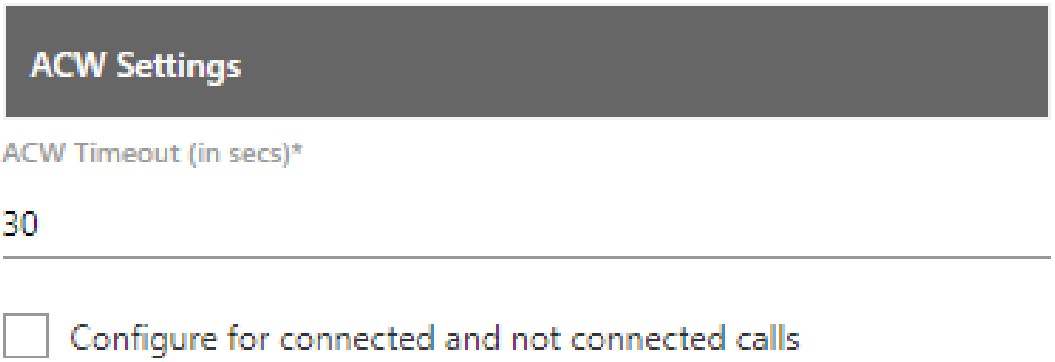


Figure: ACW Timeout

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

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

11. **Voice Logs Settings:** Here, you can manage the settings related to the Voicelogs.
    1. **Voice Logs Enabled**: Check this box to enable the logging of voice logs. However, you can uncheck it to disable the voice logs.
    2. **Play Periodic Beep**: Check this box to play a beep periodically during the call to notify the caller that the call is being recorded. After checking it, you can specify the interval in seconds after which the beep will be played.

Voice Blast Campaign: Provide the following inputs to create the campaign that broadcasts the pre-recorded voice messages automatically to the provided list of numbers.

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

2. Peak Call Count: Peak Call Count is the maximum calls that can take place at the same time in this campaign.
3. Call ID: Enter the DID Number that will be displayed as the caller ID. "NODID" is the default value.

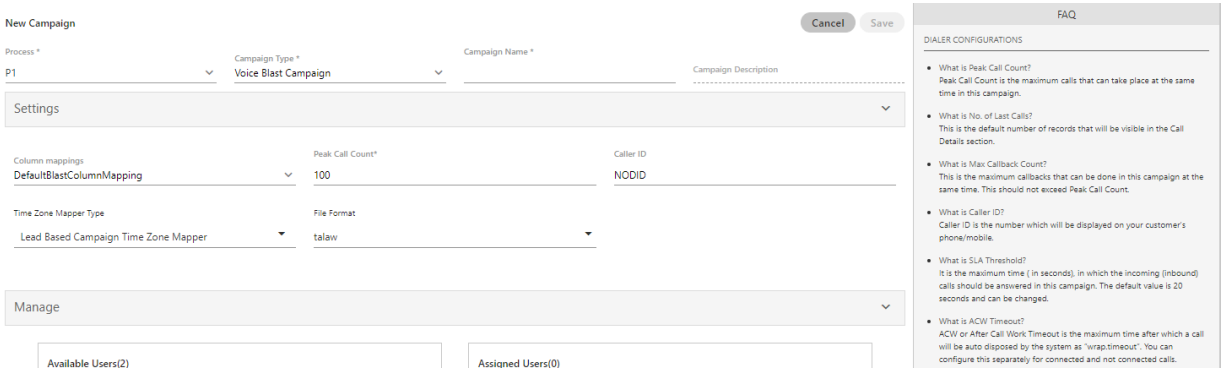


Figure: Creating New Voice Blast Campaign

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

- talaw
- tulaw
- tgsm
- tg729
- alaw

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

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

> Only Supervisors can be added in Voice Blast Campaign.

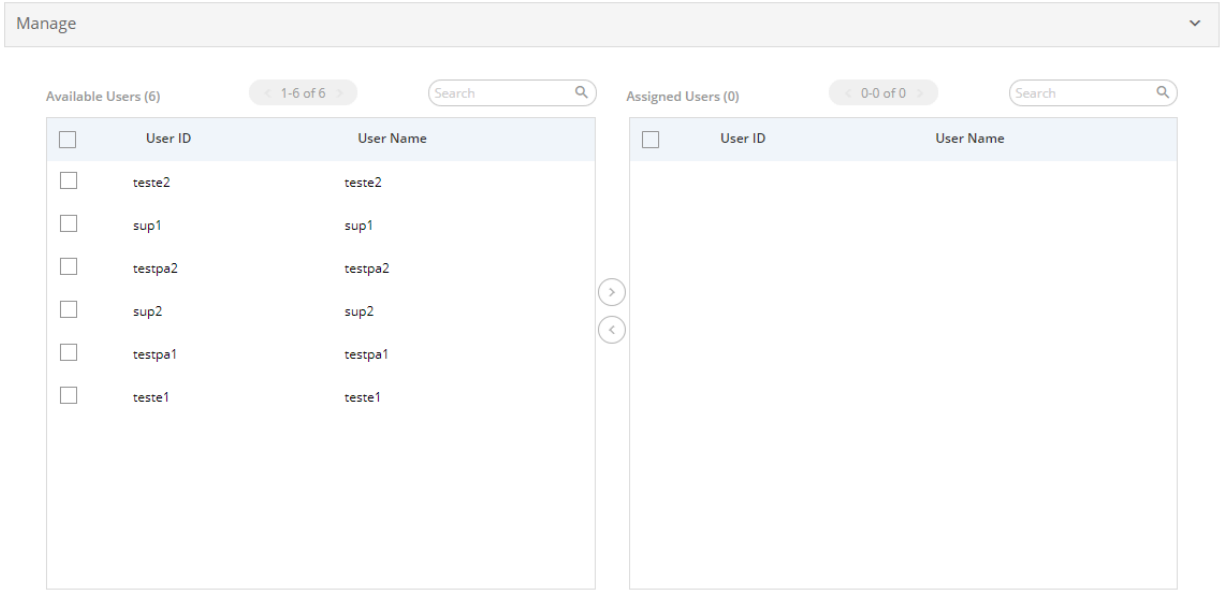


Figure: Section to assign users

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

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

B. Click on forward arrow icon to add the selected users.

6. Browse to top, and click "Save" button to create the campaign.

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

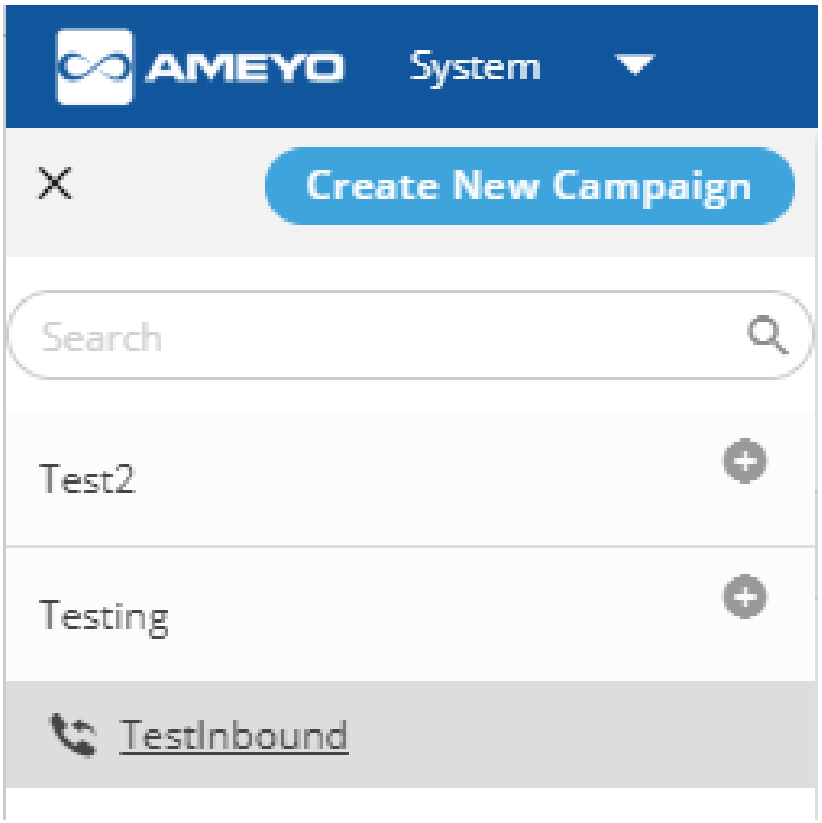


Figure: Created the Campaign

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

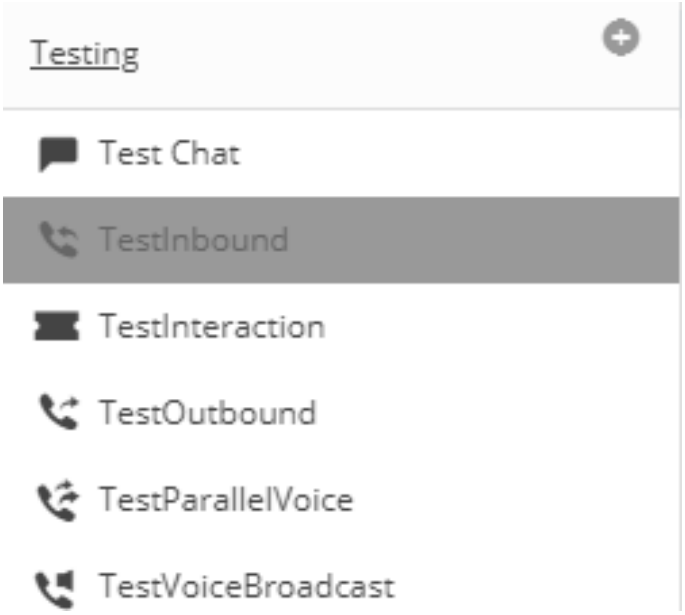
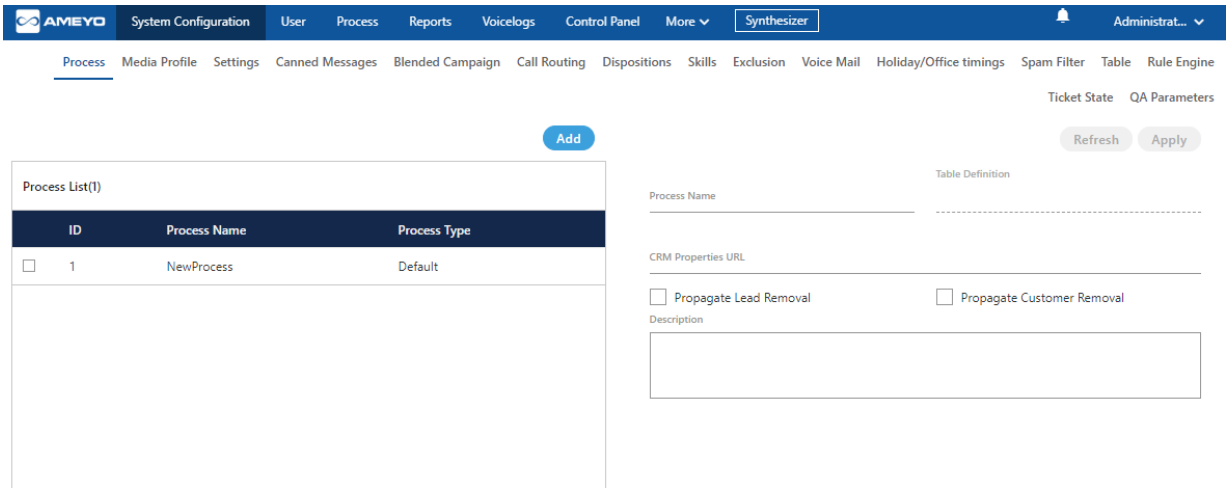


Figure: Created Multiple Campaigns

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

19.1.8. Changed System Configuration After Creating Campaign

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



- **Media Profile**
- Canned Message
- Blended Campaign (Licensed Feature)
- Call Routing
- Dispositions
- Skills (Licensed Feature)
- Exclusion
- Voice Mail (Licensed Feature)
- Holiday/Office Timings (Licensed Feature)
- Spam Filter
- Rule Engine
- Ticket State

19.1.8.1. Media Profile

This tab allows you to create the Media Profiles such as Email Address, Twitter, and Facebook. After creating the media profile, you can modify its settings, select ticket resolver, and add signature.

Types of Media Profiles are listed herein below. You can create, modify, and delete the media profiles. Click the links to know more about them.

- Email Media Profile
- **Facebook Media Profile:** Integration of Facebook as media profile has certain steps and procedures. **Click here to know the steps to integrate Facebook as Media Profile**
- **Twitter Media Profile:** Integration of Twitter as media profile has certain steps and procedures. **Click here to know the steps to integrate Twitter as Media Profile**
- **SMS Media Profile:** Integration of SMS as media profile has certain steps and procedures. **Click here to know the steps to integrate SMS as Media Profile**

19.1.8.1.1. Email Media Profile

As the name suggests, it lets the Administrator add an email address as a media profile. After assigning to campaign, this email media profile can be used to send and receive emails to interact with the clients.

Create Email Media Profile

> When we create Email Media Profile, then it starts fetching the emails immediately at once. If no routing rule is created to add the fetched emails to a particular campaign or a particular queue, then these fetched emails will not be displayed in the system. Also, the rule to route the emails can be created only after creating the media profile. Therefore, it is suggested to create an incomplete email media profile by some steps such as provide a wrong username or password. After it, create a routing rule in "Rule Engine" → "Routing" by selecting this Email media profile and select the required both queue and campaign. After creating the rule, correct the issues in Media Profile. Now, the emails will be fetched and displayed in the system.

Perform the following steps to create an Email media profile.

1. Click "Add" to create an email media profile. It shows the following pop-up.**Figure:** Register a Media Profile

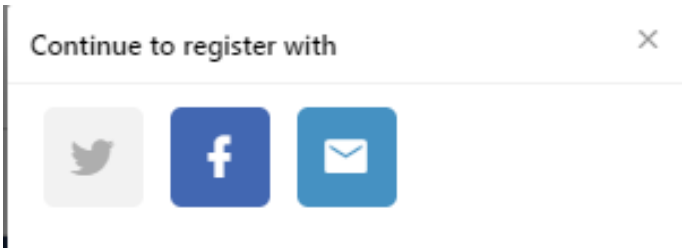


Figure: Register a Media Profile

2. Click  icon to create an Email based Media Profile using the following pop-up.**Figure:** Create Email Media Profile

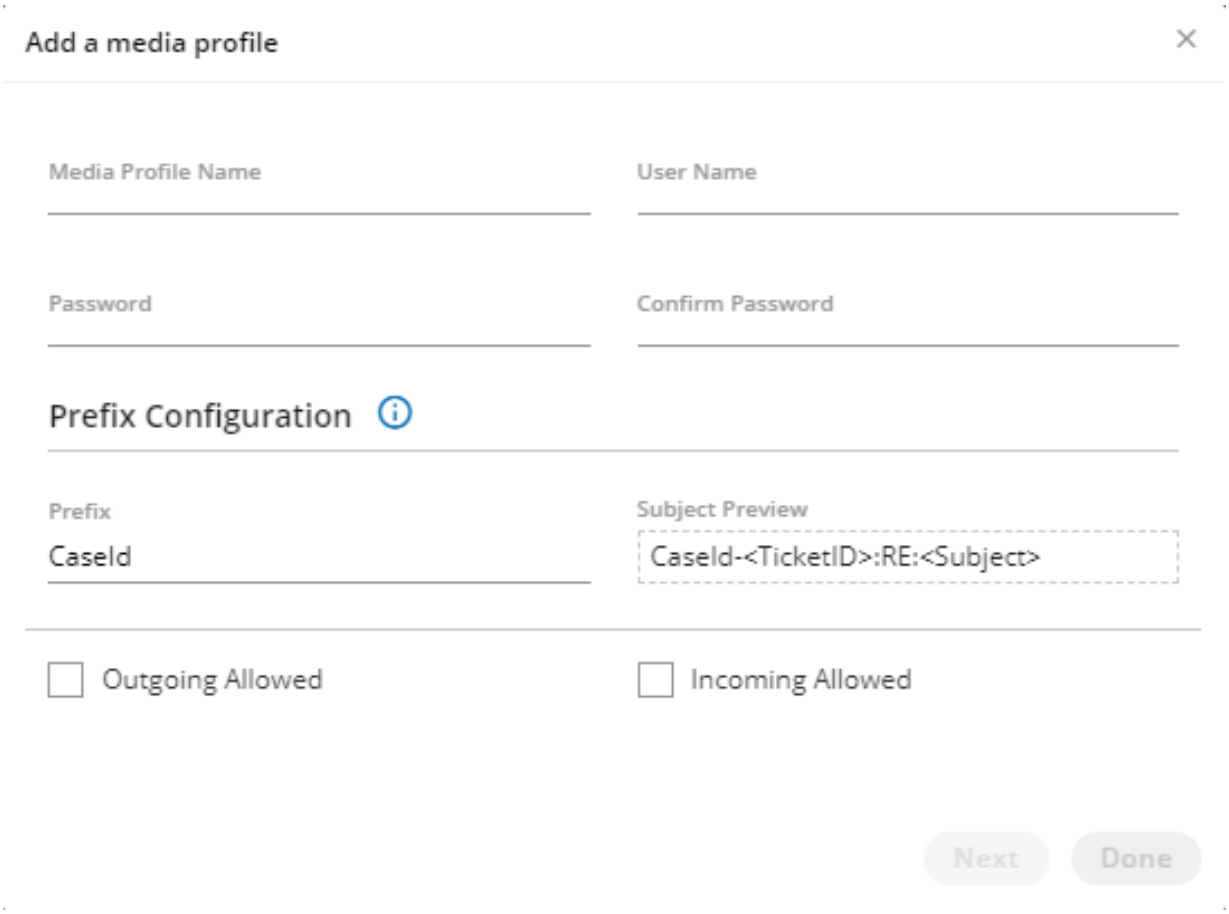


Figure: Create Email Media Profile

3. **Media Profile Name:** Provide a name for the new media profile.
4. **User Name:** Provide the email address as the username.
5. **Password:** Provide a password for the email address entered in "username" field.

> A user can generate App-Specific Password through its Google Account Settings and use this App-Specific Password as a password to its Gmail Account while creating an Email Media Profile.

6. **Confirm Password:** Re-enter the same password to confirm.
7. **Send From (Name):** Provide a name of the sender. All emails sent from this media profile will display this name as "Sender's Name". The limit of 52 characters has been applied to "Send from Name" field. While creating or modifying an Email Media Profile, the number of consumed character limits and the maximum character limit is displayed at the bottom of "Send from Name" field. Refer to the following screenshot.

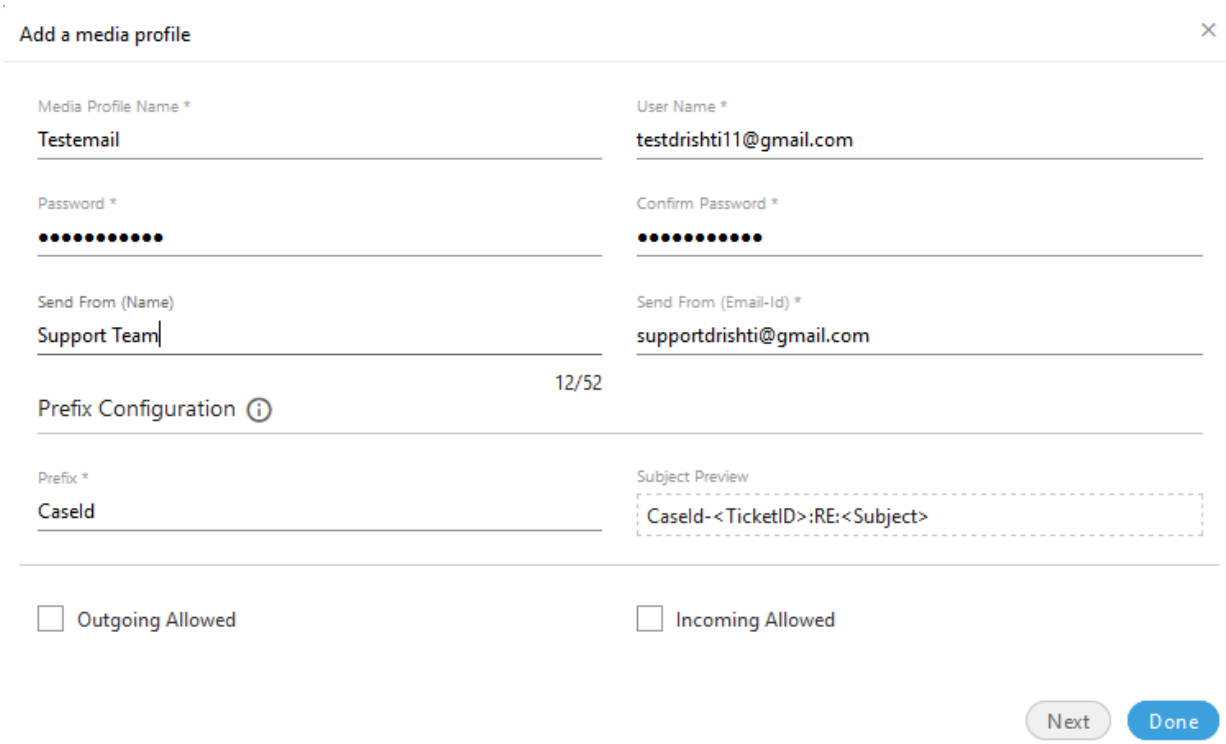


Figure: Send from the Email ID

If a user tries to provide more than 52 characters in "Send from Name" field while adding or modifying an Email Media Profile, then it will show an error below the field that "You have exceeded the maximum character limit."

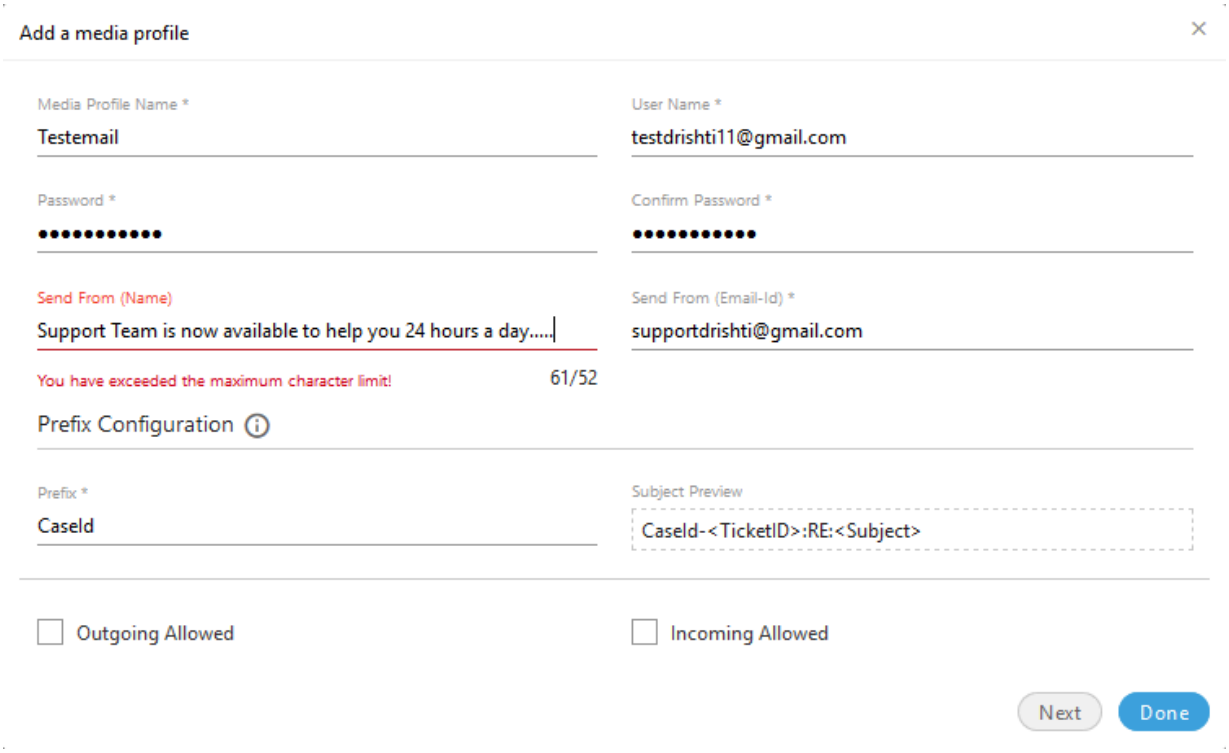


Figure: Error while entering characters more than 52

8. **Send From (Email Address):** Provide a sender's email address. When an agent uses this media profile to send the email, then "Send from Email Address" will be stored and

displayed as the sender's address in its ticket in "Activity".

9. **Prefix:** Provide a prefix for the subjects.
10. **Subject Preview:** Provide the subject that will be sent with the emails sent using this profile.
11. **Outgoing Allowed:** Check this box to allow the sending of outgoing emails. After enabling it, you have to provide the following inputs.
    - *Outgoing Host*: Provide the SMTP Address of your email provider.
    - *Outgoing Port*: Provide the port number for sending outgoing emails.
    - *Send Protocol*: Select any of the following protocols to send the emails.
        - NONE
        - SMTP
        - SMTPS
        - EWS (Exchange Web Services) – supports **modern authentication (OAuth)** starting from 4.13.4
    - *Outgoing Folder*: Provide the folder name that will store the outgoing email.
    - *Enable 'reply-to' email*: Check this box to provide "reply-to" email address. If a recipient click on reply on the received email, then the email address provided here will be the recipient. After enabling it, provide the reply-to email.
    - *Delete mail on Fetch*: Select it to delete those emails which have been fetched.

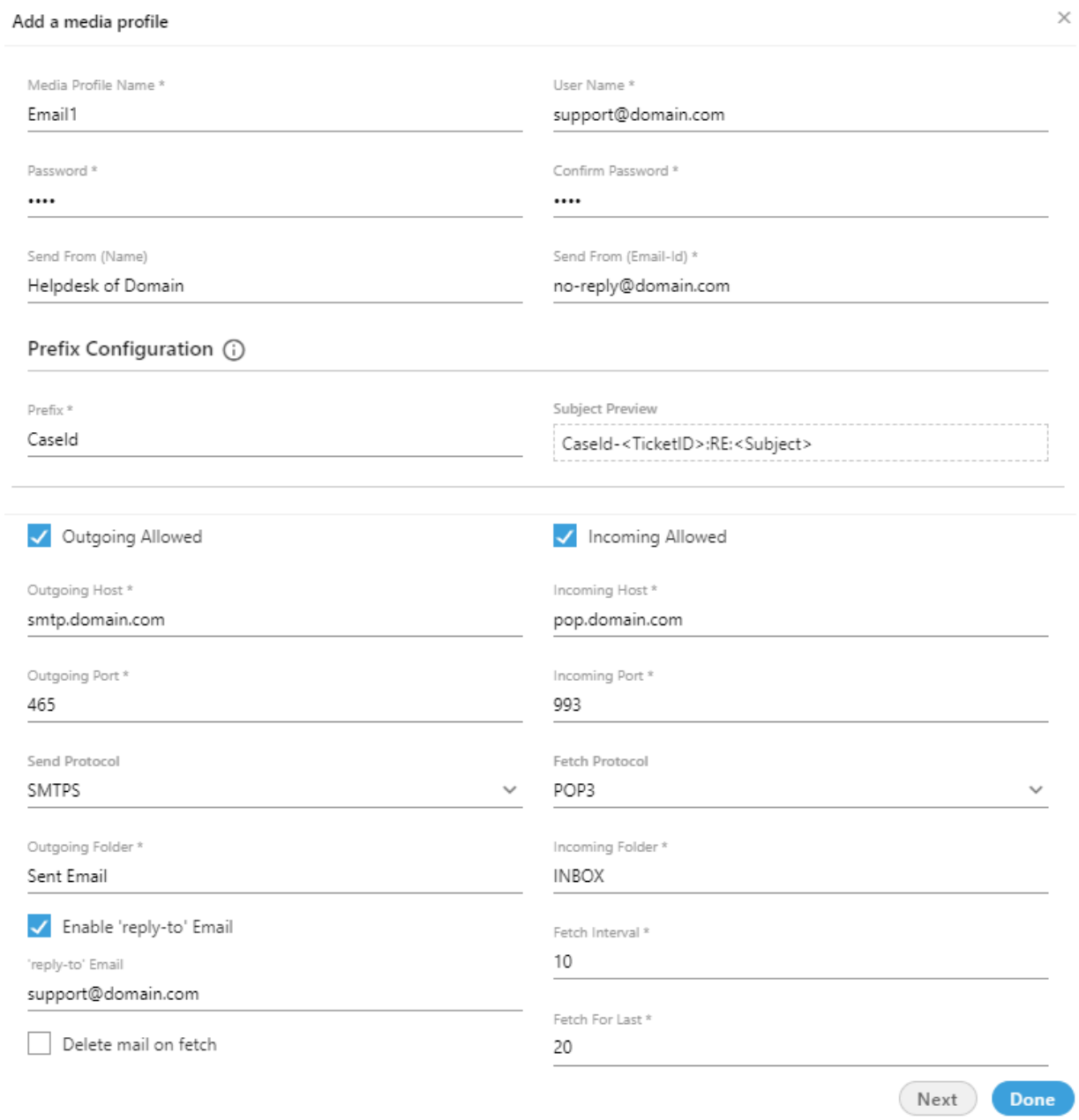


Figure: Sample Email Media Profile

Fetched Emails will not be displayed in the system until the Routing Rule to direct these emails to a particular campaign and queue. And the rule cannot be created until the Media Profile is created. Therefore, provide some wrong details here and create an incomplete media profile. After creation of profile, create a rule in "Rule Engine" → "Routing" the fetched emails to the particular campaign and queue and then modify this email media profile with correct details.

12. **Incoming Allowed:** Check this box to allow the receiving of incoming emails. After enabling it, you have to provide the following inputs.

- *Incoming Host*: Provide the incoming Address of your email provider.
- *Incoming Port*: Provide the port number for receiving the incoming emails.
- *Fetch Protocol*: Select any of the following protocols to receive the emails.
  - NONE
  - IMAP
  - IMPAS
  - POP3
  - POP3S
  - EWS (Exchange Web Services)
- *Incoming Folder*: Provide the folder name that will store the incoming emails.
- *Fetch Interval*: Provide a value in seconds. It is the time after which the system will fetch the emails from inbox of the configured media profile. The default value is 10 seconds.
- *Fetch for Last*: Provide the number of the last days of which emails has to be fetched.

13. Here, you can perform any of the following steps.
    - Click "Next" to go to "Ticket Resolvers" page of the pop-up.

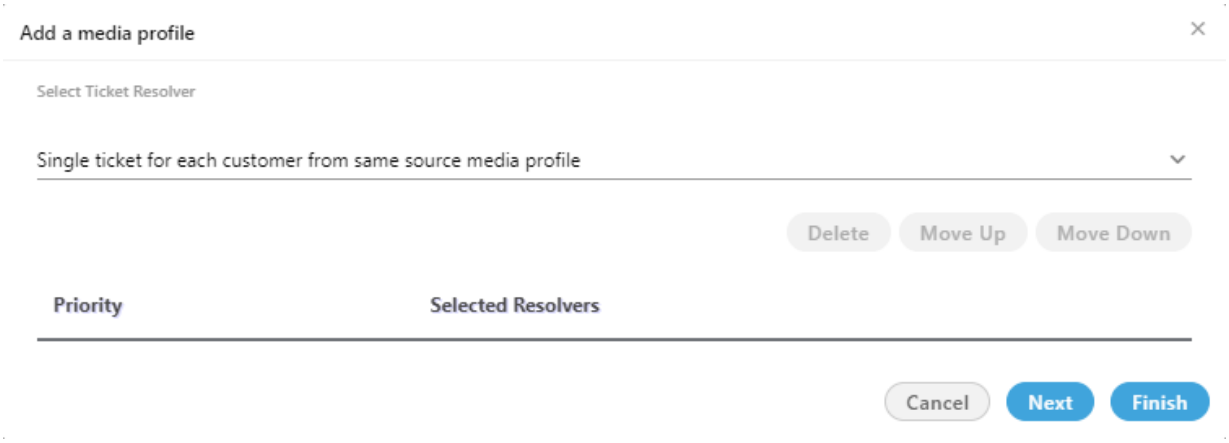


Figure: Ticket Resolver while adding Email Media Profile

Refer to **"Ticket Resolvers" Section** in this page to know which Ticket Resolvers have to be selected. After it, you can perform any of the following steps.

A.Click "Next" to go to "Define Signature" page of pop-up.

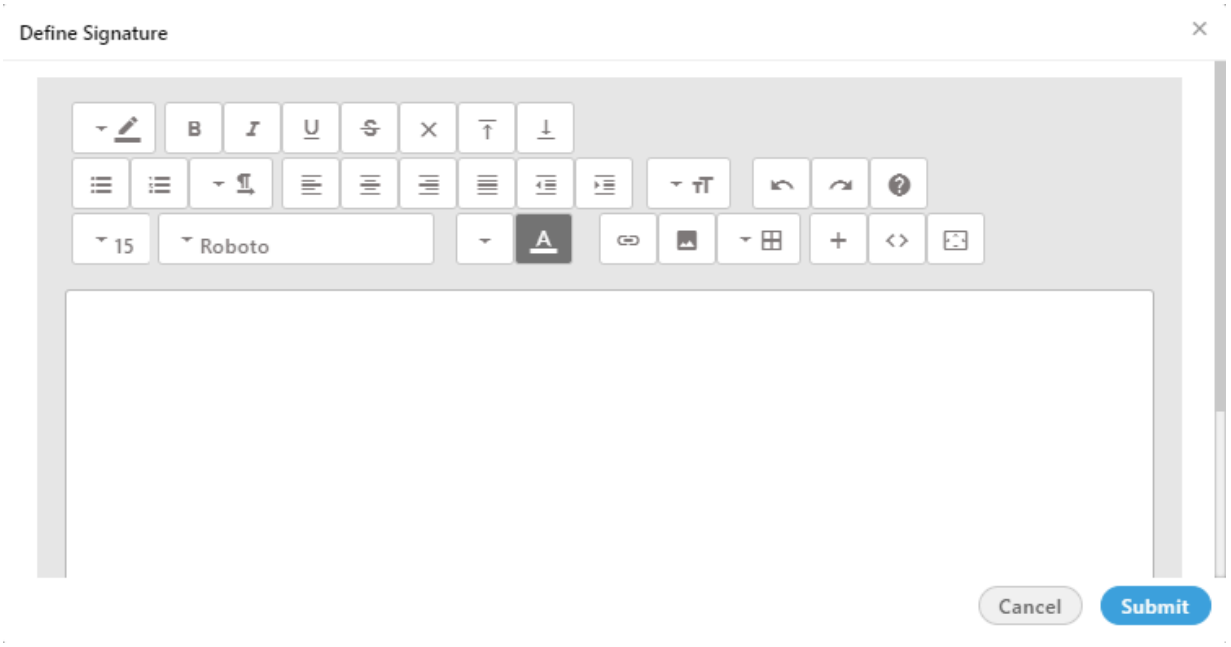


Figure: Ticket Resolver while adding Email Media Profile

Refer to "Signature" Section of this page to know how to define the Signature.

After it, click "Submit" to save the default signature. You can also click "Cancel" to not save it.

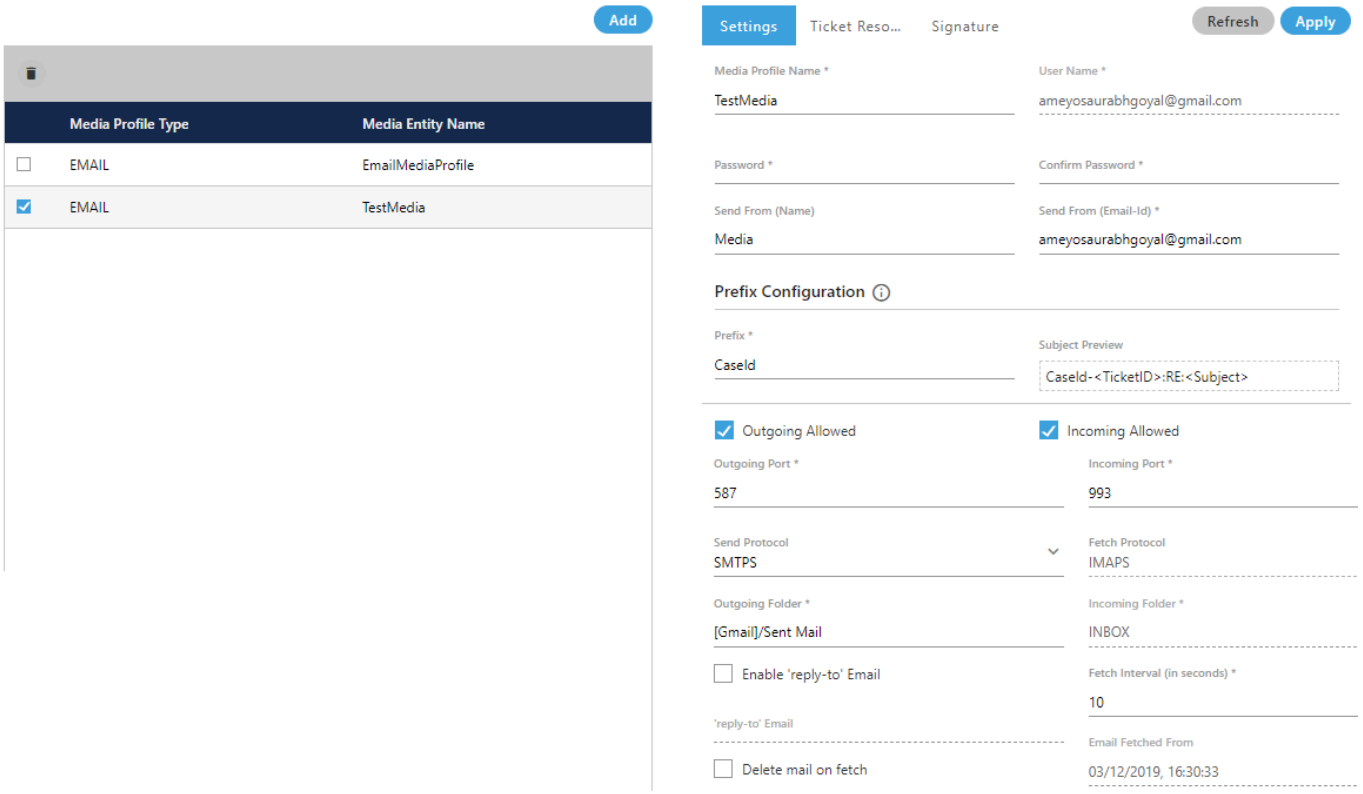
B. Click "Finish" to save the Email Media Profile and to finish this process.

2. You can also click "Done" to save the Email Media Resolver.

> *Protocol-related Information*: The Email Sender Protocol such as SMTP and Email Receiver Protocols such as IMAP and POP, and their folders cannot be changed after creating the media profile.

View and Modify Settings of Email Media Profile

Select an email media profile in the list to view its settings on the right side under "Settings" tab.



You can modify the settings here and click "Apply" to apply the same. Rather, you can click "Refresh" to discard the changes.

> While editing the media profile, the Email Sender Protocol such as SMTP and Email Receiver Protocols such as IMAP and POP, and their folders cannot be changed.
> If you want to change these settings, then, create the new media profile.

> The Email Sender Protocol such as SMTP and Email Receiver Protocols such as IMAP and POP, and their folders cannot be changed after creating the media profile. These protocols and folders cannot be changed for the existing Media Profiles.

Delete Email Media Profile

> The deleted Email Media Profile cannot be retrieved back. The campaigns, queues, and users using this Media Profile will be disabled to use the Email Media Profile to interact with your clients.

Perform the following steps to delete a Facebook media profile.

1. Select an Email media profile.

2. Click "Delete" to delete it. It shows the following warning message.

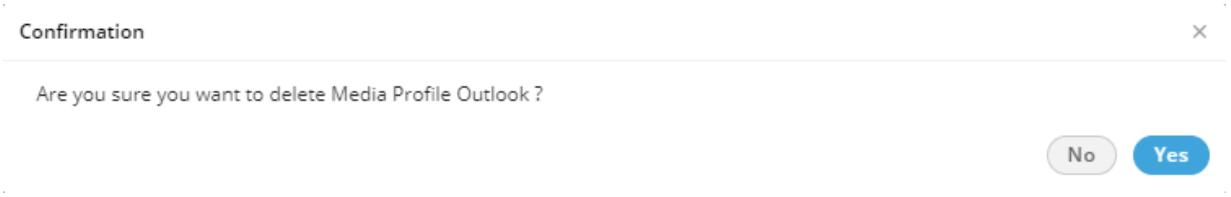


Figure: Asking to delete the Email Media Profile

3. Click "Yes" to delete the email media profile. Rather, you can click "No" to not delete it.

Ticket Resolver for Email Media Profile

> All Email Media Profile resolvers listed here are now improved that they will work for all email addresses available in the Customer Account Information. These Ticket Resolvers will also work for splitted and merged tickets.

This tab lets you manage how the tickets in a campaign (where the selected media profile is added) will be handled. Following is a screenshot for Ticket Resolver Tab for a Email Media Profile.



You can click the drop-down menu titled "Select Ticket Resolver" to select any of the following options.

- **Single ticket for each customer from same source media profile :** Select it to create a single ticket for all emails from a same source media profile. It means the email coming from a same email address but to a different media profile will create a different ticket. It acts quite similar to "Single Ticket for each customer" to create a single ticket for each customer; however, it appends the emails to a ticket after checking the Media Profile ID. Suppose there are separate media profiles IDs for Customer Care and Sales Team.

Emails of the customer to the Sales Team will be added to a separate ticket of Sales Department. Similarly, emails to Customer Care will be added to the separate ticket of Customer Care. Without this resolver, all emails of the customers to both Sales and Customer Care will be added to a single ticket only.

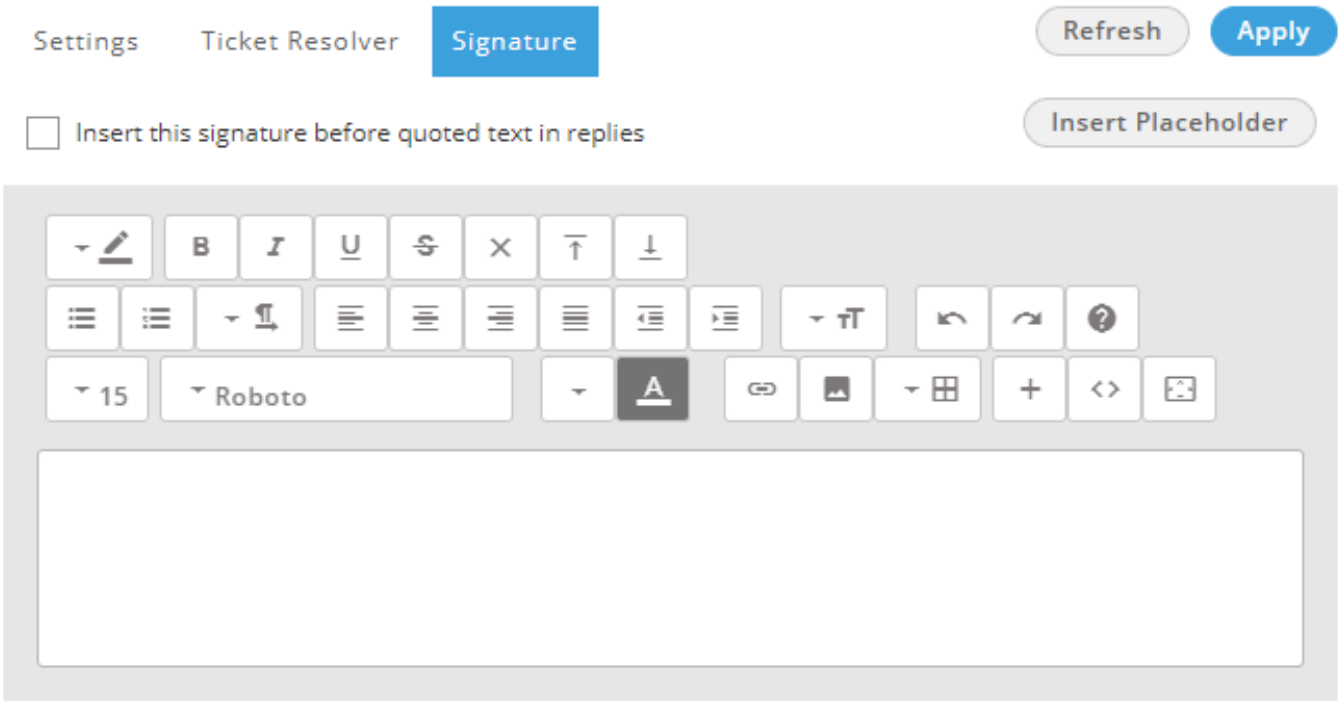
- **Single ticket for each customer:** Select it to create a single ticket for all emails from a customer in the campaign. Every new email from the same customer with same or different subject will be appended in the same ticket.
- **Single ticket of same subject:** Select it to create a single ticket for all emails having same subject. All emails having same subject from same or different customers will be added into the same ticket.
- **Single ticket of same subject from same customer:** Select it to create a single ticket for all emails having same subject sent from the same customer.
- **Case ID based Resolver:** A case is created for a new email. All emails replied on this email thread, then these will be appended to the same ticket. If a new email thread is created, a new ticket will be created.
- **Single ticket with same subject from observer:** Select it to create a single ticket of all emails having same subject from the observer who is in CC of an email received from a customer.
- **Subject Media Profile Customer Interaction Resolver:** Select it to create a single ticket for all emails having same subject from the same customer for the same media profile. A New ticket will be created only when the customer sends an email with another subject to same media profile or connect with other media profiles with same or another subject.

When you select a resolver, it gets added in the list. The added ticket resolvers will be removed from the drop-down menu. After adding mutliple resolvers, you can move them to up or down to specify their priority. See the following screenshot.



Signature

This tab will be visible only for Email Media Profile. This tab lets Administrator to specify the signature for all emails that will be sent using this email media profile.



Here, perform the following steps to create an email signature.

1. Click "Insert this signature before quoted text in replies" to insert the signature before the quoted text. Keep it uncheck if you want to insert the signatures after the quoted text.
2. You can type the signature in the textarea and use the available tools to format the text, add a hyperlink, and insert an image.

3. Click "Insert Placeholder" to insert the dynamic placeholders from the following dialog box.

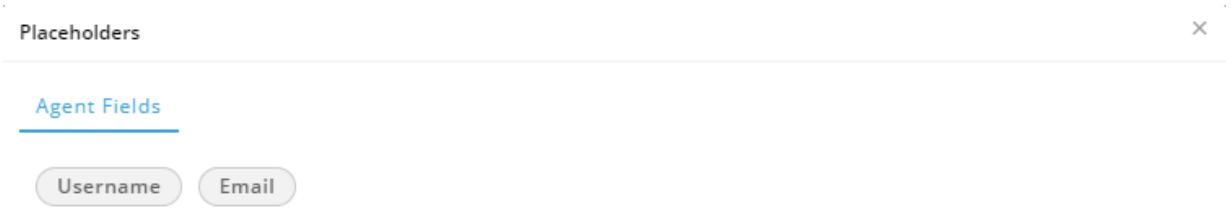


Figure: Signature Placeholder

4. After creating the signature, click "Apply" to apply the same. Now, the created signature will be displayed on all emails being sent through the selected Email Media Profile.

Failure Mail Configuration

The administrator can configure failure mail settings for the Email Media Profile. When the mail-id of the customer is wrong, then the mail sent to the customer is considered as failure mail.

> The failure mail can only be configured for “Customer Based Resolver.” If the resolver is “Case Id Based” then a new ticket will be created for the same failure mail. The failure email will get the escalation mark on the dashboard screen of the agent. The agent can reply on the same ticket, and hence the ticket will handled.

Execute the following command to login to the database.

psql -U postgres ameyodb

1. Execute the following query for the Gmail based email profile.INSERT INTO ic_configuration_parameter (contact_center_id,name,value) Values (<contact_center_id>,'failureMailConfiguration','**mailer-daemon@googlemail.com**');
2. Execute the following query for the Yahoo based email profile.INSERT INTO ic_configuration_parameter (contact_center_id,name,value) Values ('<contact_center_id>','failureMailConfiguration','**mailer-daemon@yahoomail.com**');



Figure: Gmail based Failure Message Configuration

Mapping Incoming and Outgoing Media Profile

The administrator can map any incoming media profile with some other outgoing media profile.

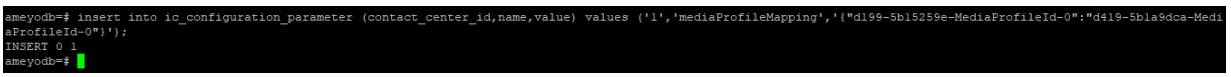
Example

Let's assume there are two media profiles named as M1 and M2. If a ticket is coming from media profile M1, then the administrator can map the media profile M1 with M2, which means if ticket is coming from M1, then while answering on the same ticket, the media profile M2 will select automatically.

Execute the following query to map the incoming media profile with another outgoing media profile.

INSERT INTO ic_configuration_parameter (contact_center_id,name,value) VALUES ('<contact_center_id>','mediaProfileMapping','{"<Incoming_Media_Profile_Id>":"<Outgoing_Media_Profile_Id>"}');

> In the above query, the Incoming_Media_Profile_Id is the Id of the incoming media profile and Outgoing_Media_Profile_Id is the Id of the outgoing media profile id.
> With the help of the above query, you can define multiple mappings for multiple set of media profiles.



> If do not have the media profile id, then run the following query and copy the respective media profile id.
> Select * from media_profile;

Handling the Email Server Error Messages and Retry Sending Policies in Ameyo

Ameyo introduces the Handling to manage the error messages thrown by the Email Provider Server of an email address and . The following four different policies have been introduced to handle such error messages.

1. **Default Retry:** Select it to retry sending the email just after the failure. It's configuration code is "DEFAULT_ENTRY". "maxRetryCount" variable is used to define its value and its default value is 3.
2. **Rate Limit Retry:** Select it to retry sending the email when retry rate limits of the server are breached. By default, the retry is tried to be attempted after 24 hours. It's configuration code is "RATE_LIMIT_RETRY". "rateLimitRetryTime" variable is used to define its value and its default value is 86,400 seconds (that is 24 hours).
3. **Progressive Retry:** Select it to attempt the retry in the progressive intervals such as every 5 minutes, 10 minutes, 15 minutes, and 20 minutes. It's configuration code is "PROGRESSIVE_RETRY". "progressiveRetryInterval" variable is used to define its value and its default value is 300 seconds (that is 5 minutes).
4. **No Retry:** There are some error messages for which the retry sending should not be tried again. It's configuration code is "NO_RETRY".

These policies come preconfigured in Ameyo and apply automatically upon detecting their relevant error codes. For example, the following table illustrates the Gmail Error Codes and the corresponding Ameyo Email Error Handling Policy for them.

Gmail Error Codes	Ameyo Email Error Handling Policy
UNIDENTIFIED_ERROR	DEFAULT_RETRY
ADDRESSING_ERROR	NO_RETRY
MAILBOX_ERROR	PROGRESSIVE_RETRY
MAIL_SYSTEM_ERROR	PROGRESSIVE_RETRY
NETWORK_ROUTING_ERROR	RATE_LIMIT_RETRY
MAIL_DELIVERY_PROTOCOL_ERROR	NO_RETRY
MESSAGE_CONTENT_ERROR	NO_RETRY
SECURITY_POLICY_ERROR	PROGRESSIVE_RETRY
NO_SUCH_PROVIDER	NO_RETRY
CONNECTION_ERROR	PROGRESSIVE_RETRY
UNKNOWN_HOST	NO_RETRY
INTERNAL_ERROR	NO_RETRY

Working of Policies with Default Configuration

The following will be the result of applying the default configuration using the above policies.

- All the errors corresponding to "Default Retry" Policy should get retried immediately.
- All the errors corresponding to "No Retry" Policy will not get retired.
- All the errors corresponding to "Rate Limit Retry" Policy should get retried after 24 hours.
- All the errors corresponding to "Progressive Retry" Policy should get retried at intervals of 30 minutes, 1 hour, and 1.5 hours.
- Same can be verified from "s_message_send_info" and "failed_message_send_info".

Working of Policies with Customized Configuration

Perform the following steps.

1. Run the following query to customize the configuration.

```
INSERT into media_profile_configuration(media_profile_id, contact_center_id,
media_profile_type, media_profile_properties) VALUES ('<media_profile_id>,
<contact_center_id>,'email', '{"maxRetryCount":"3",
"rateLimitRetryTime":"86400", "progressiveRetryInterval":"300"}')
```

Refer to the following table to know the definition of variables and their default value.

Variable	Definition	Default Value	Linked Policy
maxRetryCount	is the Maximum Count of Retry Attempts.	Its default value is 3.	Default Retry
rateLimitRetryTime	It is the retry late limit of the email server after which the email can be retried to send.	It's default value is 86,400 seconds that is 24 hours.	Rate Limit Retry
progressiveRetryInterval	It is the Progressive Retry Interval after which the email can be retried to send.	It's default value is 300 seconds.	Progressive Retry

2. Run the following CURL command to reload the configuration.

```
curl -X POST
http://localhost:8888/ameyorestapi/media/messages/reloadMediaProfileConfigura
tion -H 'sessionId: <Administrator-session-id-only>'
```

The following will be the result of applying the customized configuration using the above policies.

- All the errors corresponding to "Default Retry" Policy should get retried immediately.
- All the errors corresponding to "No Retry" Policy will not get retired.
- All the errors corresponding to "Rate Limit Retry" Policy should get retried after configured time.
- All the errors corresponding to "Progressive Retry" Policy should get retried at intervals of configured time.
- Same can be verified from "s_message_send_info" and "failed_message_send_info".

Microsoft Email OAuth (Modern Authentication)

Starting from version 4.13.3, the platform supports **Microsoft OAuth (modern authentication)** for email media profiles. This replaces legacy username/password authentication when connecting to Microsoft 365 / Exchange Online mailboxes, aligning with Microsoft's deprecation of Basic Authentication.

Key capabilities

- **OAuth token flow (4.13.3+):** Configure a Microsoft Azure AD app registration (Client ID, Client Secret, Tenant ID) and use OAuth to authenticate the email media profile instead of a static password.
- **EWS + modern auth (4.13.4+):** The **EWS** send/fetch protocol can also leverage OAuth, so deployments using Exchange Web Services benefit from the same modern authentication flow.
- **Stronger refresh-token handling (4.13.29+):** Improved token refresh logic automatically renews OAuth tokens before expiry. If a refresh fails, the profile is marked **inactive** and administrators see a **Re-authenticate** action in the media profile settings to trigger a fresh OAuth consent flow without recreating the profile.

Version History

Version	Enhancement	Release Notes
4.13.3	Microsoft email OAuth (modern authentication) support	
4.13.4	EWS + modern authentication	
4.13.29	Stronger refresh-token handling, re-authenticate action, inactive-profile marking	

19.1.8.2. Canned Messages

Canned messages are predefined reply templates which can be used to quickly send out replies to tickets. A category is associated with each canned message, according to which agent can select canned message. Click "Canned Messages" Tab in to view the canned messages and their categories.

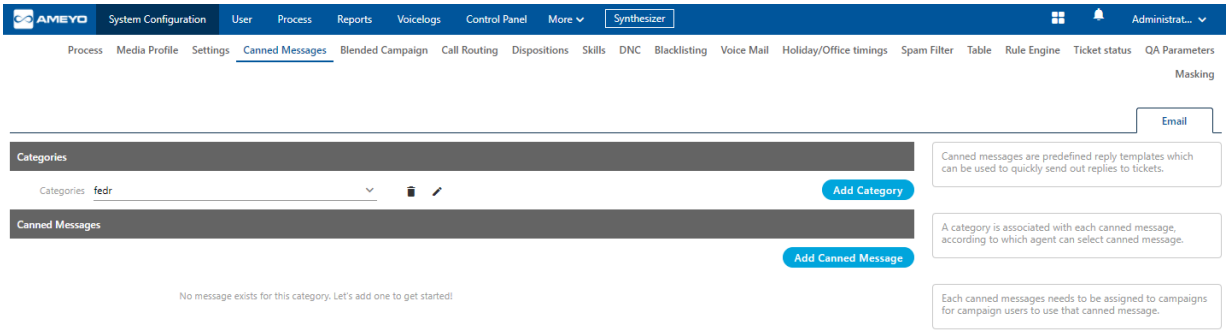


Figure: Canned Messages Tab

Here, you can perform the following functions.

Create Category

Perform the following steps to create a category of Canned Messages.

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

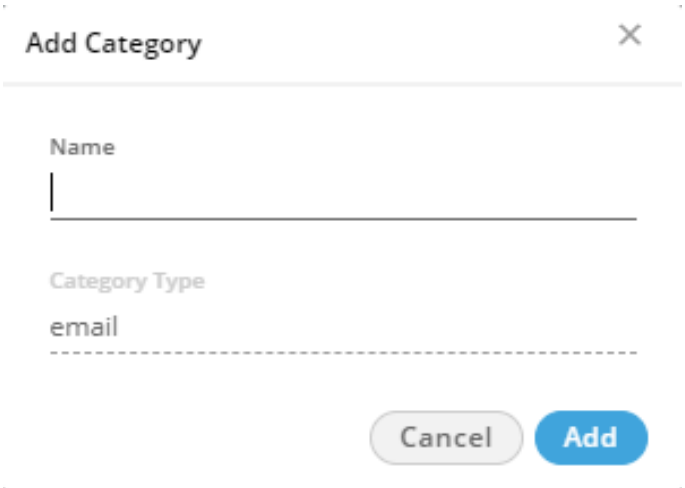


Figure: Add Category of Canned Messages

2. Provide a name for the category.
3. Click "Add". The category is created and listed in the drop-down menu.

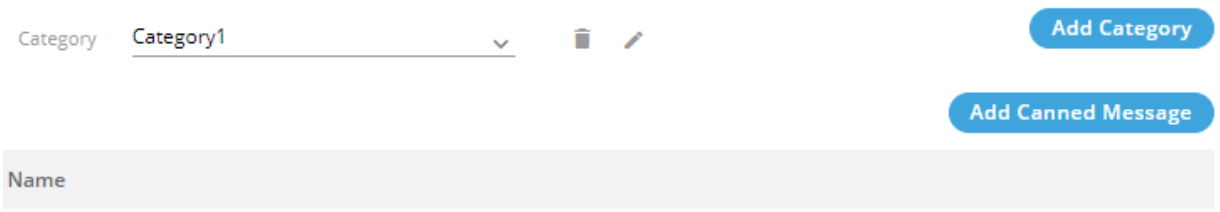


Figure: Added a Category of Canned Messages

You can create multiple categories. After creating category, the interface of this page will change.

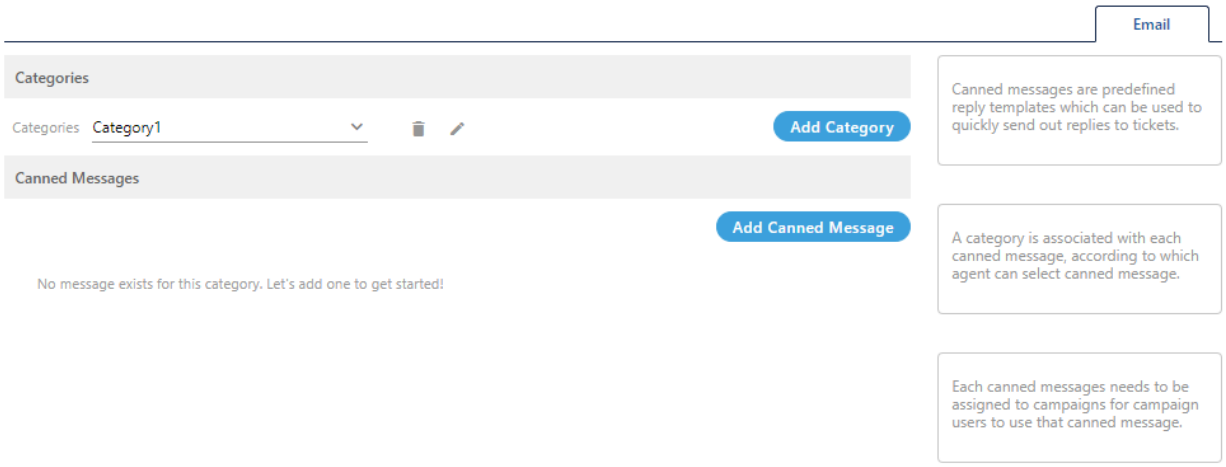


Figure: Categories of Canned Messages

Modify a Category

Perform the following steps to edit a category of Canned Messages.

1. Select the category from the drop-down menu and click on edit Select the category from the drop-down menu and click

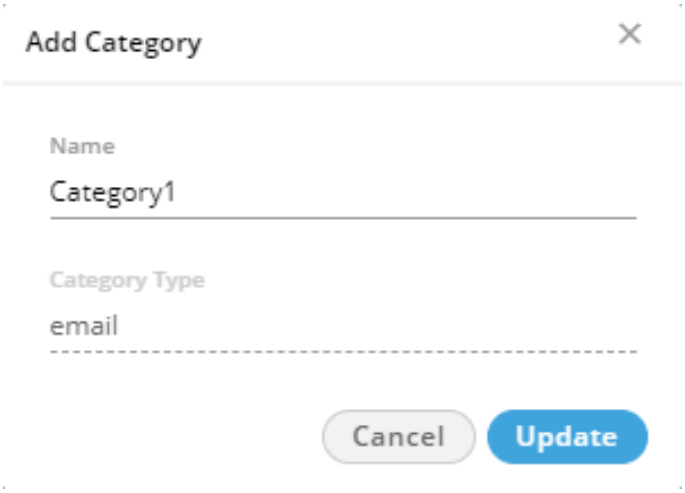


Figure: Modify a Category of Canned Messages

2. You can only change the name of category. You cannot change the category type.
3. Click "Update" to modify the category else click "Cancel" to discard the changes.

Delete a Category

Perform the following steps to delete a category.

1. Select the category from the drop-down menu and click on delete icon to delete the category.

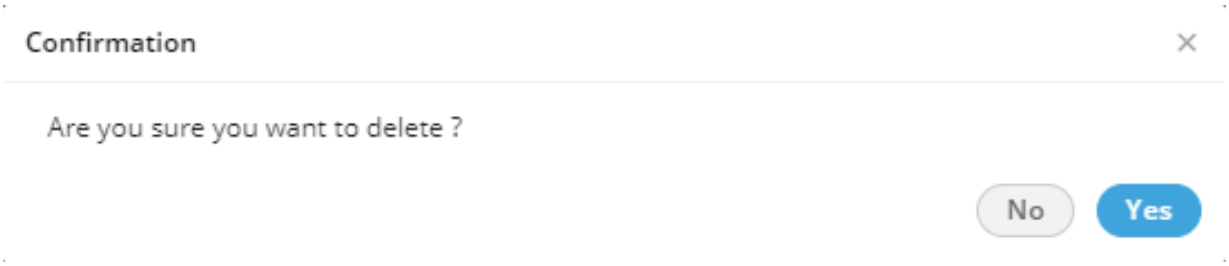


Figure: Asking to Delete a Category of Canned Messages

2. The following warning message is displayed on the screen.
3. Click "Yes" to delete the category else click "No" to keep it.

Create a Canned Message in a Category

Perform the following steps to create a canned message in a category.

1. Select the category from the drop-down menu.
2. Click "Add Canned Message" to add a canned message using the following pop-up

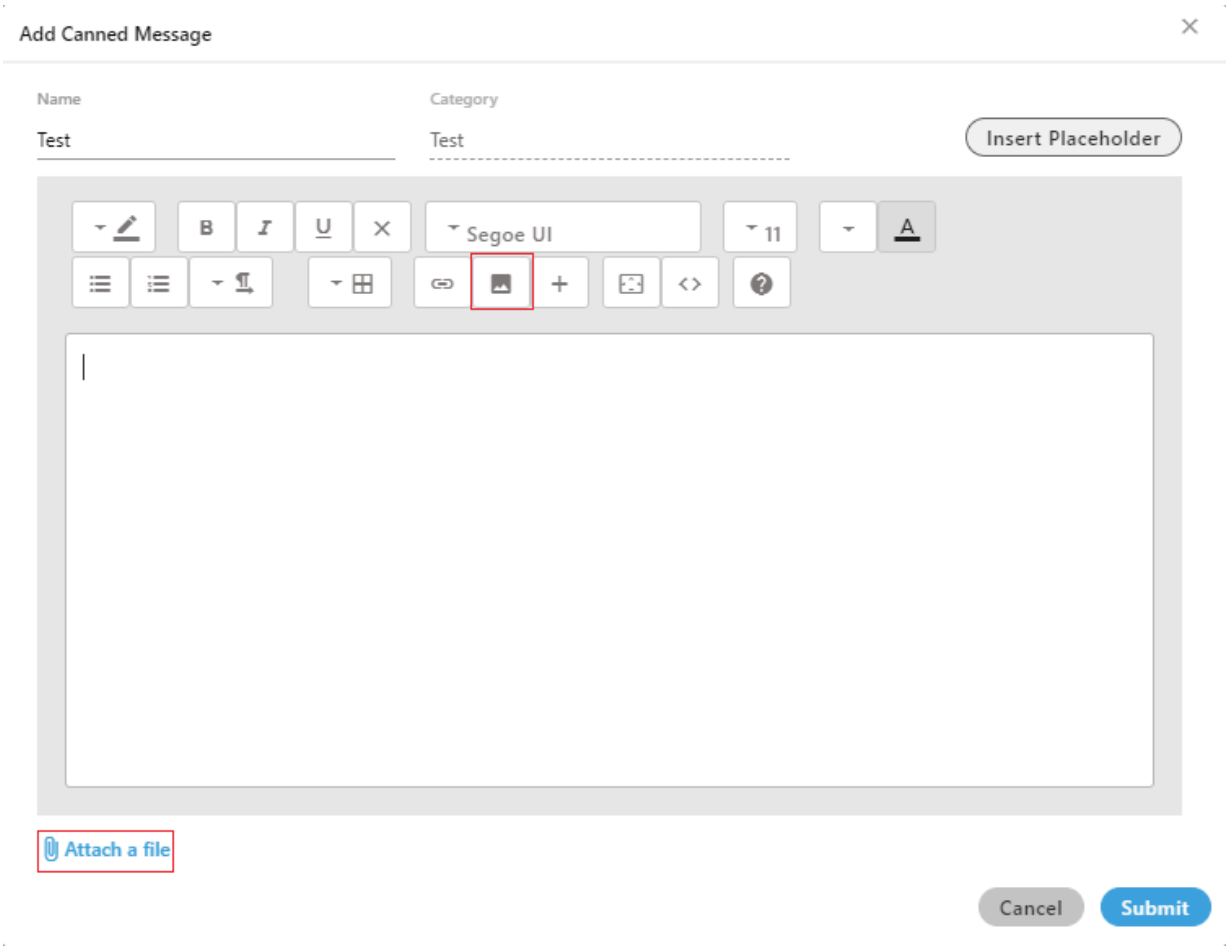


Figure: Add a Canned Message

The administrator can attach media files such as images through "Attach a file" option present here. Click icon to insert inline images.

3. Provide a name of the canned message.
4. You can type the message in the text area.
5. You can click "Insert Placeholder" button to add any placeholder displayed in the following screenshot

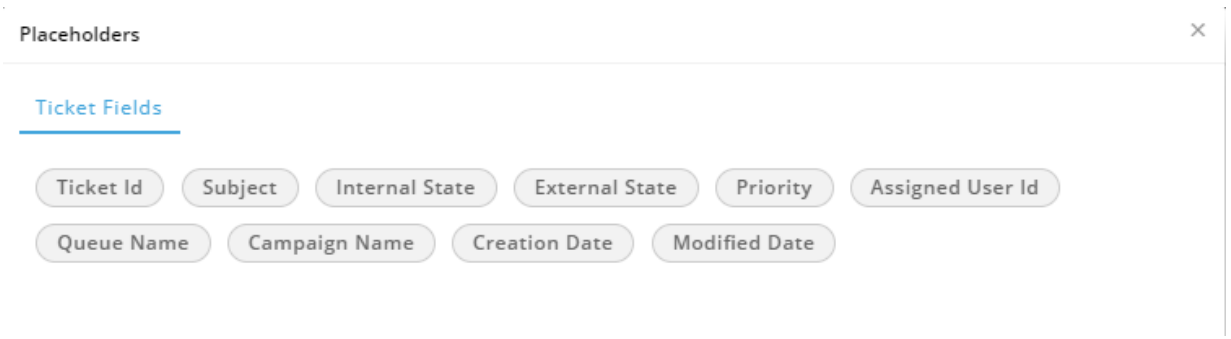


Figure: Placeholders

6. Following is a sample canned message

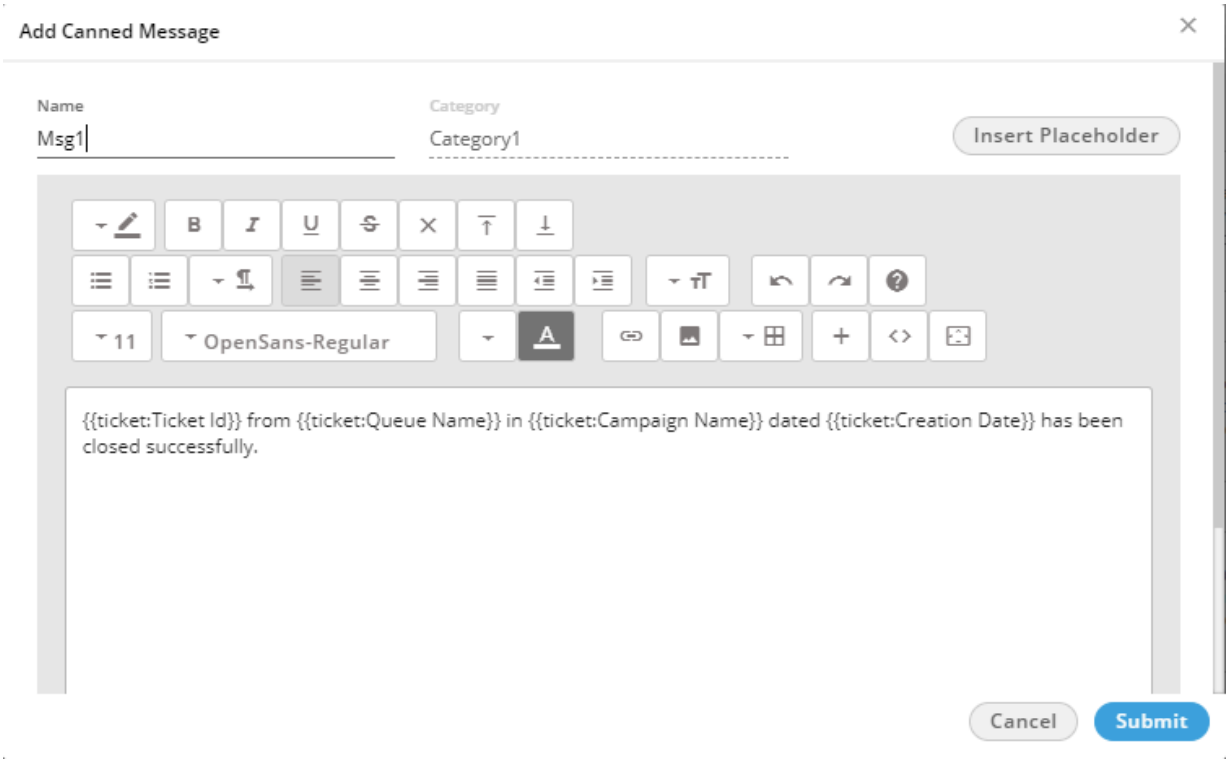


Figure: Sample Canned Message

7. Click "Submit". It lists the canned message in the white area

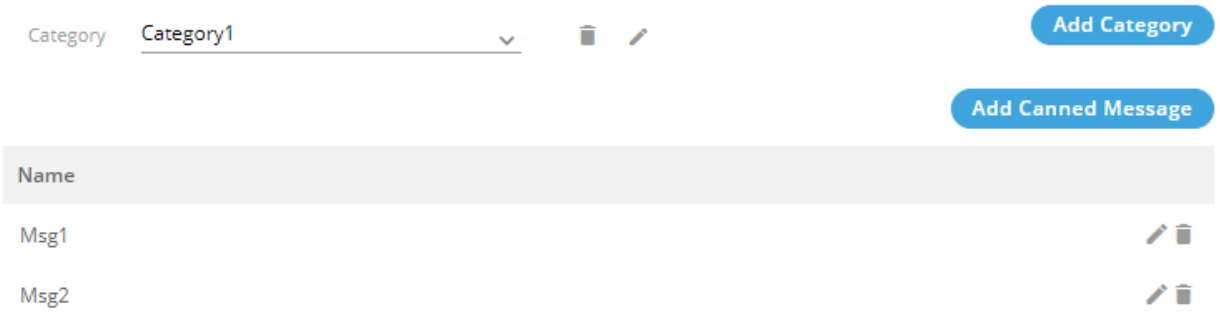


Figure: Added Canned Messages

Attachments

While creating or modifying a canned message, the administrator can attach files and insert inline images.

Use the **Attach a file** option to upload media files, such as images, and click the respective icon to insert inline images within the message content.

Supported File Types and Limitations

The following file formats are supported for attachments in canned messages:

.doc, .docx, .xls, .xlsx, .ppt, .pptx, .xps, .pdf, .dxf, .ai, .psd, .eps, .ps, .svg, .ttf, .zip, .rar, .tar, .gzip,

.mp3, .mpeg, .wav, .ogg, .jpeg, .jpg, .png, .gif, .bmp, .tif, .webm, .mpeg4, .3gpp, .mov, .avi, .mpegps, .wmv, .flv, .txt

> Only one file can be attached at a time. The maximum combined file size for all attachments in a single canned message is **25 MB**.

Modify a Canned Message

Perform the following steps to modify a Canned Message.

1. Click on  edit icon with for a canned message to modify it using the the following pop-up

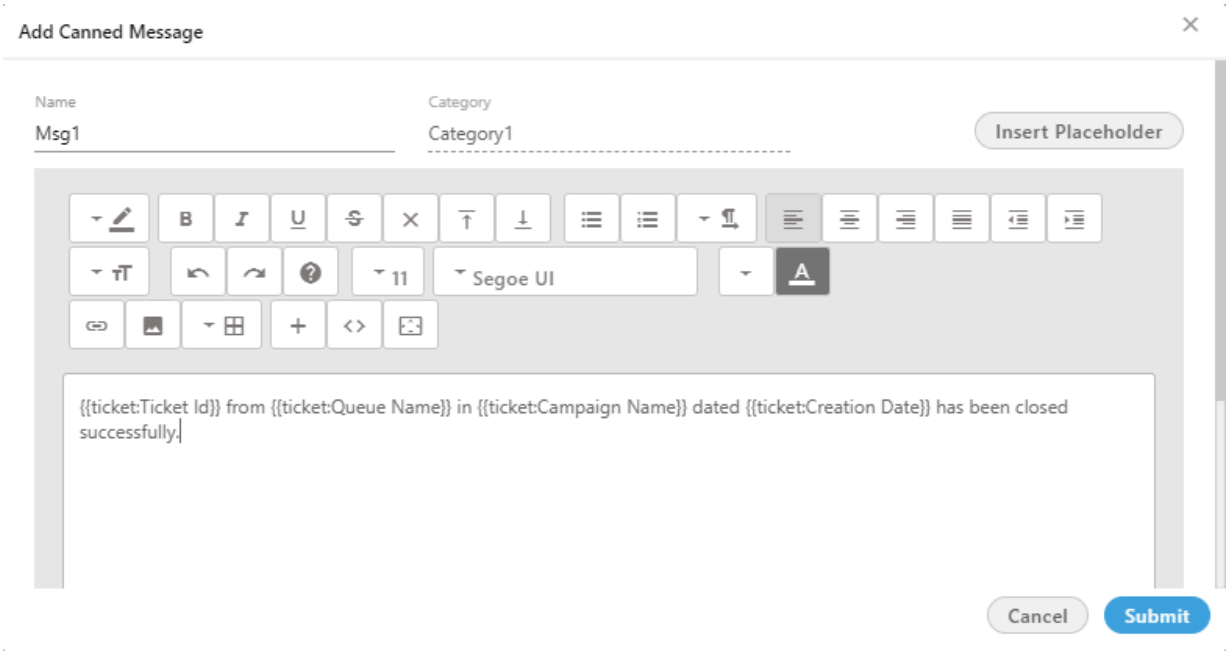


Figure: Modify a Canned Message

2. You can modify the name and content of the canned message.
3. You can click "Insert Placeholder" button to insert the placeholders.
4. You cannot change the category of an existing canned message, while modifying it. To change the category, you have to delete the canned message and create a new one.
5. Click "Save" to save the changes. Else, you can click "Cancel" to not save it.

Delete a Canned Message

Perform the following steps to delete a canned message.

If you delete a Canned Message, then the users would not be able to use it while performing their tasks. Also, there is no way to restore the deleted canned message.

1. Click on Delete icon for a canned message to delete it. The following warning message is displayed on the screen

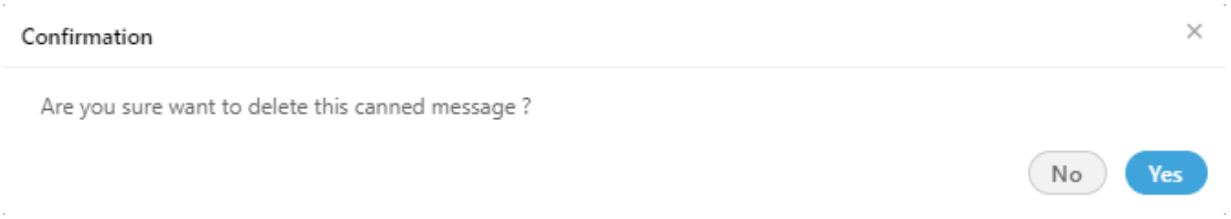


Figure: Warning while deleting a Canned Message

2. Click "Yes" to delete the selected canned message. Click "No" to not delete the Canned Message.

> You have to assign the canned messages in the campaign so that the users in that campaign can use them.

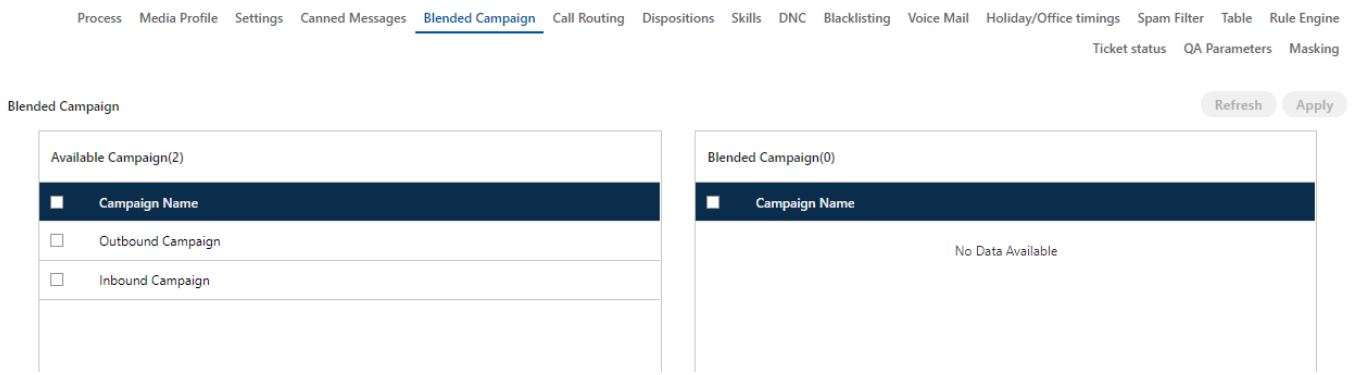
19.1.8.3. Blended Campaign (Licensed Feature)

Overview:

A blended campaign (licensed feature) enables a group of inbound and outbound campaigns to function together, allowing agents to log in to multiple campaigns at the same time. With this feature, agents can participate in both inbound and outbound campaigns simultaneously using a single interface.

To configure blended campaigns, go to the "Blended Campaign" tab within "System Configuration." Here, the administrator can select which campaigns to blend from the available list, enabling streamlined management and enhanced agent productivity.

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



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

19.1.8.4. Call Routing

Call Routing Configuration

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

1. DefaultCallContextProfile:

We can define the call contexts (like Zap trunks, SIP minutes) and route the calls through these contexts to a particular node flow in a campaign. Here we need not to identify the Source / Destination number.

2. DefaultSourcePhoneProfile:

This profile is used to identify a particular source phone and route the calls coming from that number to a particular node flow in campaign. Let's suppose if we want to do routing based on the phone number of caller. We will select the"DefaultSource Phone Profile" from Profiles tab and define the profile plans

3. DefaultDestinationPhoneProfile:

This policy is used to route the calls landing on a particular DID number. These calls can be routed to a particular node flow in a campaign. Let's suppose if we want to do routing for a particular DID number or toll free number. We will select the"DefaultDestinationPhoneProfile" and define the profile plans.

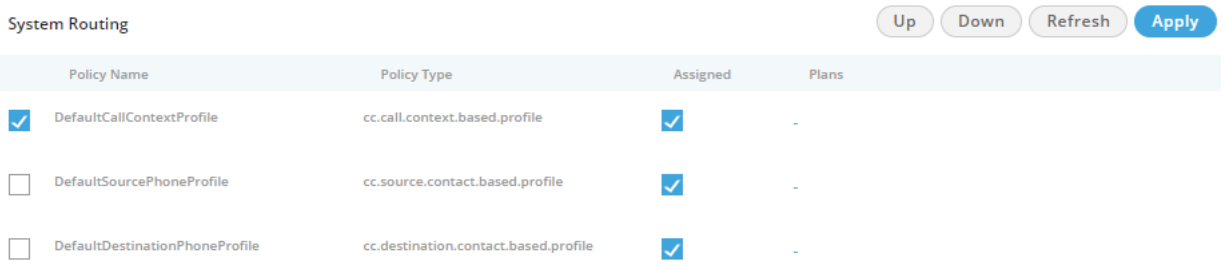


Figure: Routing Tab

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

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

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

Create Plan for a Policy

The Administrator can define the routing plan for the policies. Perform the following steps.

1. Check the box to select a policy.
2. Click "-" under "Plans" header adjacent to a policy for creating a new plan. The following pop-up is displayed on the screen.

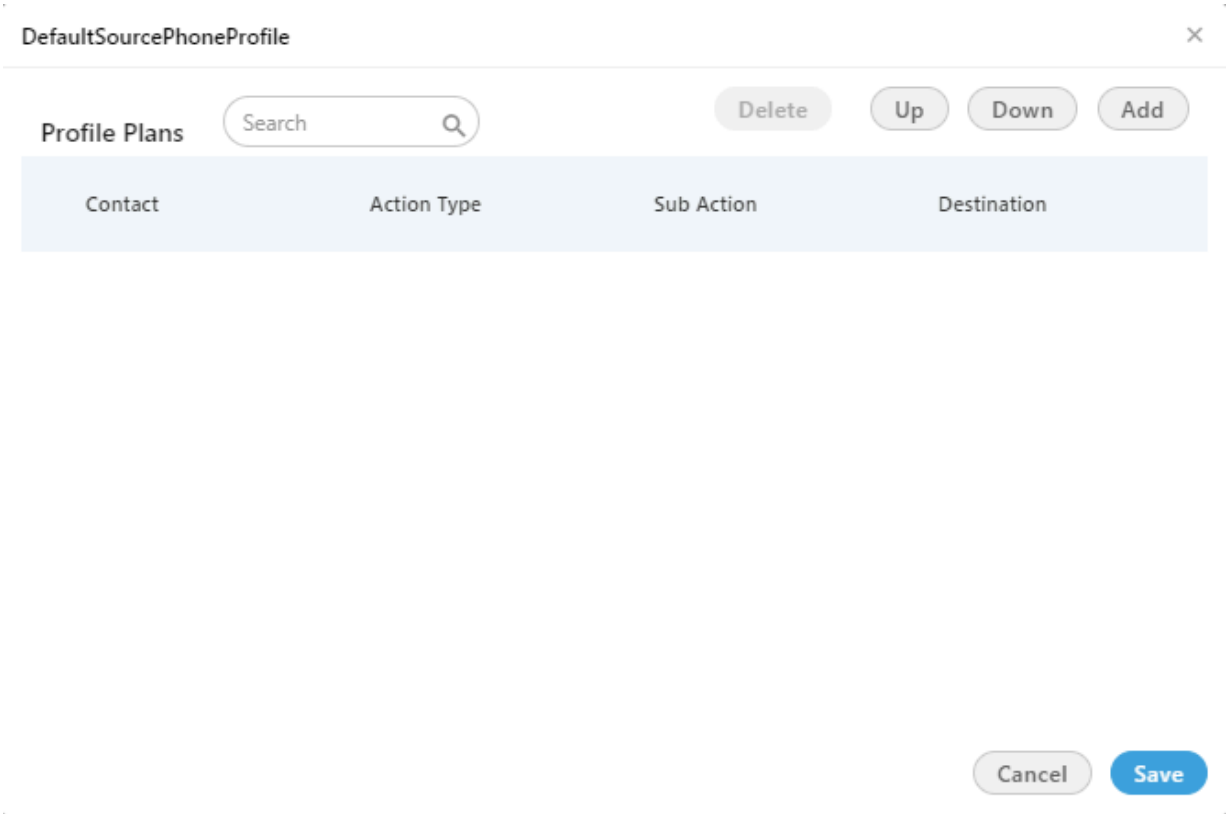


Figure: Blank Plan for DefaultSourcePhoneProfile

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

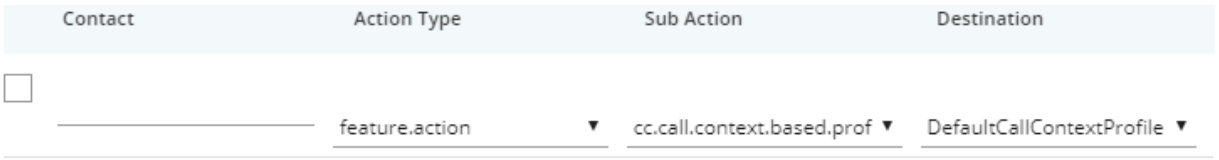


Figure: Blank Raw for DefaultSourcePhoneProfile and DefaultDestinationPhone Profile

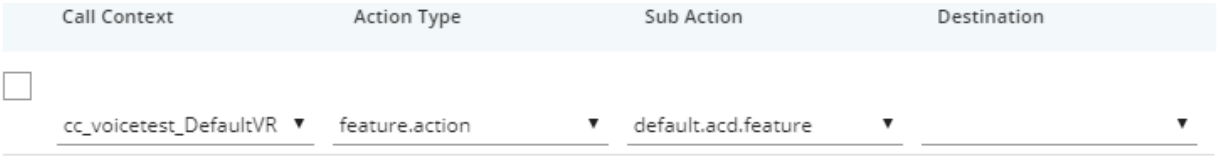


Figure: Blank Raw for CallContextProfile and DefaultDestinationPhone Profile

4. **Call Context:** This field comes for CallContextProfile Plan only. You have to select any of the following options.
    1. audiocodes
    2. cc_voicetest_DefaultVR
    3. softphone1
    4. voip

OR

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

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

    2 **Profile.action:** Select it to route the call to another profile plan. When selected, Sub-Action drop-down shows the following options.

1. cc.call.context.based.profile: Select it to transfer the call to the Call Context based Profiles. When selected, the available Call Context Profiles will be listed in the Destination drop-down menu.

2. cc.destination.contact.based.profile: Select it to transfer the call to the Destination Contact based Profiles. When selected, the available Destination Contact Profiles will be listed in the Destination drop-down menu.
3. cc.source.contact.based.profile: Select it to transfer the call to the Source Contact based Profiles. When selected, the available Source Contact Profiles will be listed in the Destination drop-down menu.

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

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

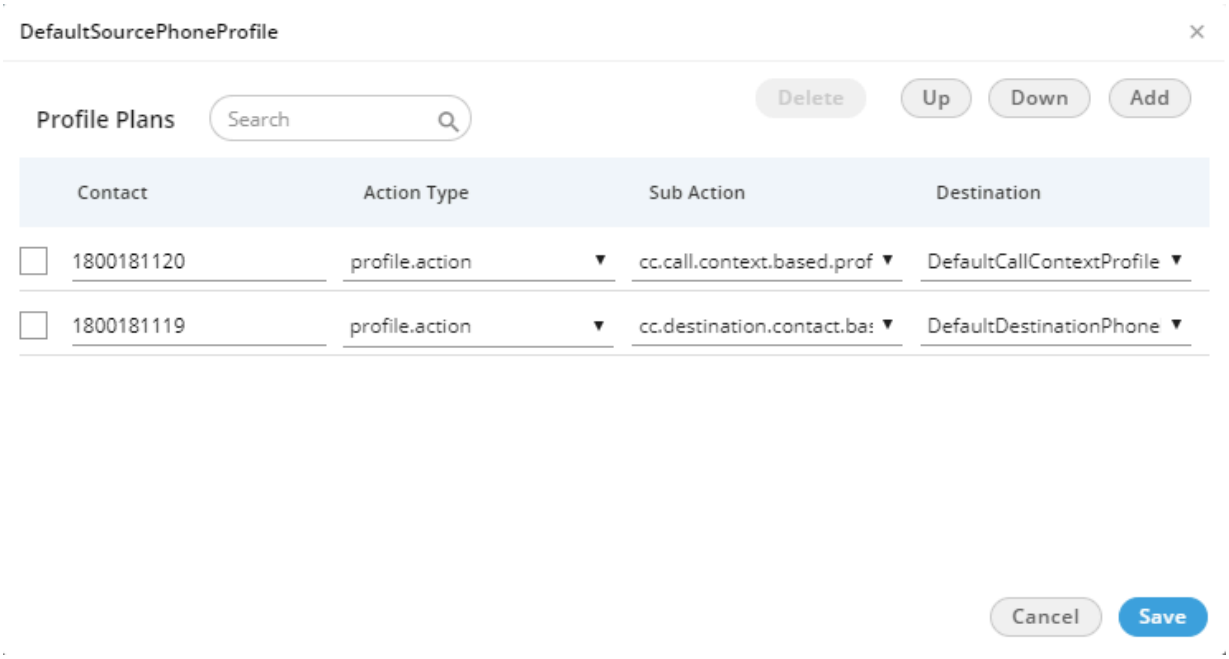


Figure: Adding Plan for DefaultSourcePhoneProfile

8. To delete the created **"Profile Plan"**, select that particular profile plan and click on **"Delete"** button.
9. Any incoming call will be routed depending on the sequence of profiles defined. Profile moved at the top level will be followed first and then next defined profile will be followed.

10. Click **"Up"** to move the row to up and click **"Down"** to move the row to down.
11. Click **"Save"** to save the changes. Rather, you can click "Cancel" to discard the changes.

You can add and modify the plan for all policies.

19.1.8.5. Dispositions

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

Disposition Class

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

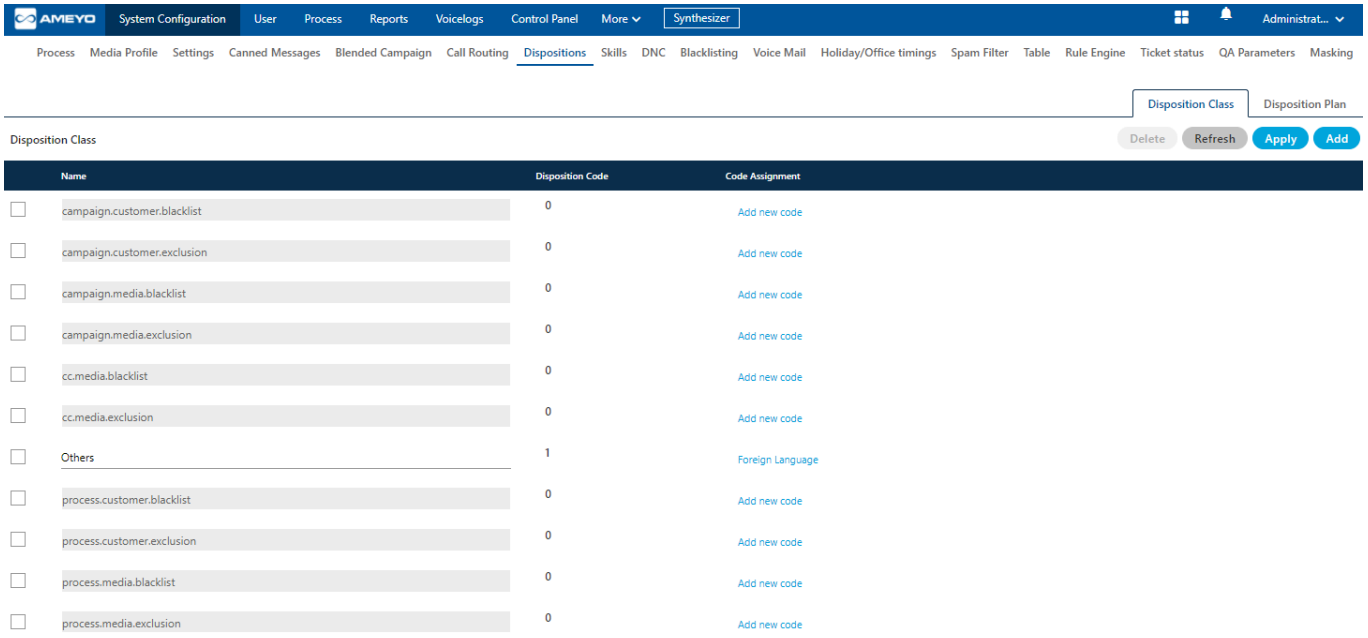


Figure: Disposition Class

Administrator can perform the following steps here.

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

> Disposition Class and Disposition Code supports 100 characters.

> Supported special characters : / ? # [ ] ! $ & ( ) * + , ; = < > % { } | \ @ . - _ and {Space}.

Disposition Plan

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

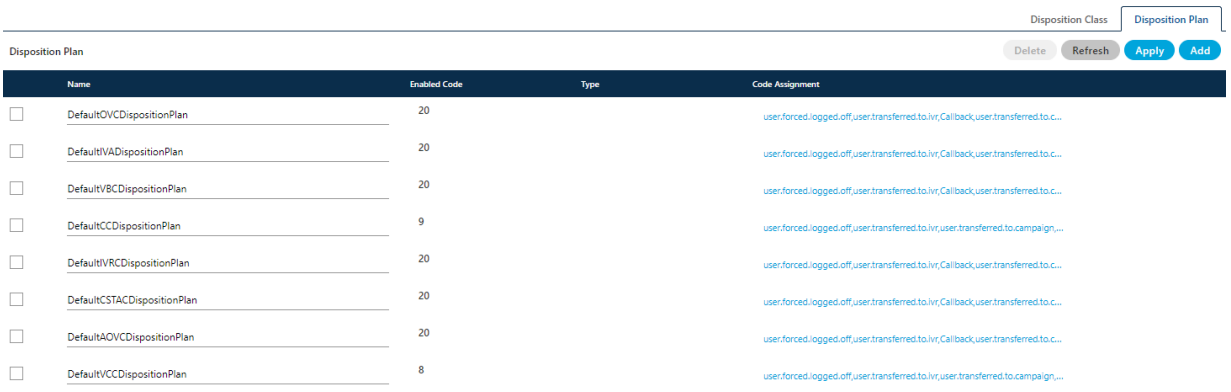


Figure: Disposition Plans

Perform the following steps.

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

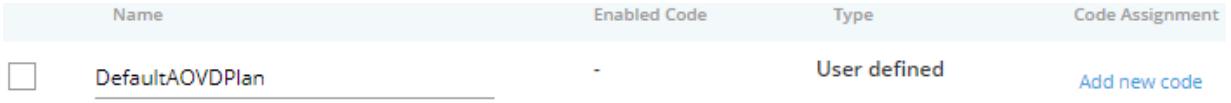


Figure: Adding New Disposition Plan

"User Defined" will be the type for custom disposition plans added by the Administrator.

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

Plan : DefaultOVCDispositionPlan

- [x] schedule.callback
  - [x] Callback
- [x] Sale
  - [x] Sale
- [x] Others
  - [x] Foreign Language
- [ ] telecom.issues
  - [ ] No Voice
  - [x] Already hungup
  - [x] Abrupt disconnection
  - [x] Echo
  - [x] Customer not able to hear
  - [x] Customer volume too low
  - [x] Agent volume too low
  - [x] Voice breakage
  - [x] Conference voice breakage
  - [x] Conference disconnection



Figure: Add or Modify Code Assignments for any Disposition Plan

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

Disposition Options for CC Users

Ameyo offers the following options of dispositions for the Users.

1. Two Level Disposition:

It means that the user can select the disposition in the hierarchical way. The user has to select the Disposition Class first and then select "Disposition Code".

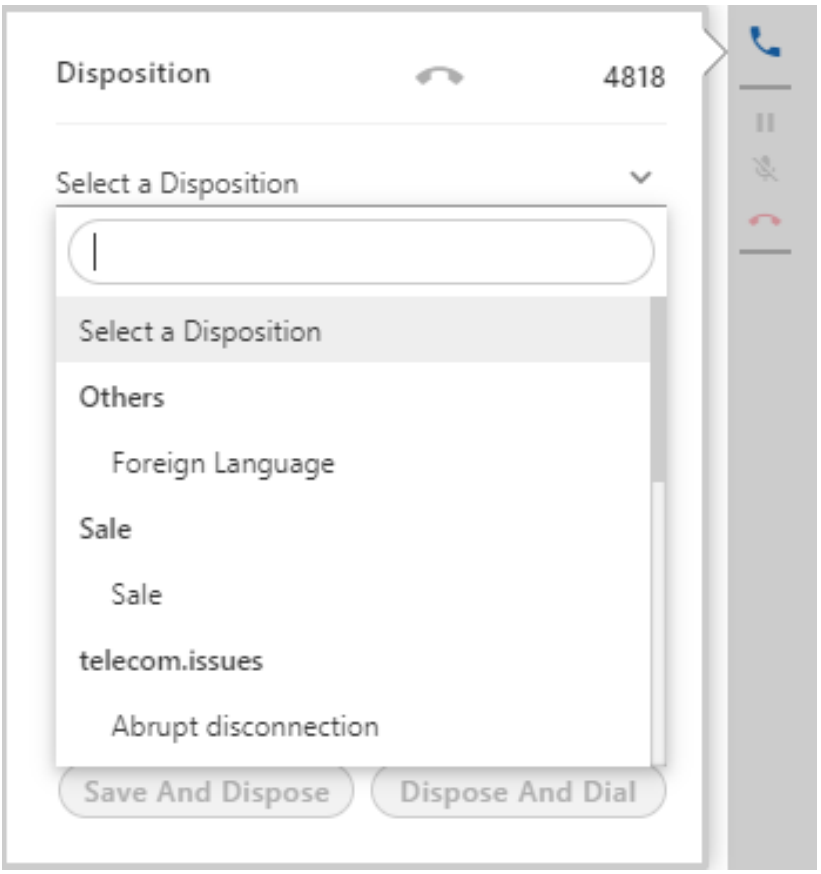


Figure: Two level Disposition Selection

> Two-level Disposition has been made default. However, the businesses can still perform the backend configuration to make "one-level" disposition as default.

One-level Disposition :

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

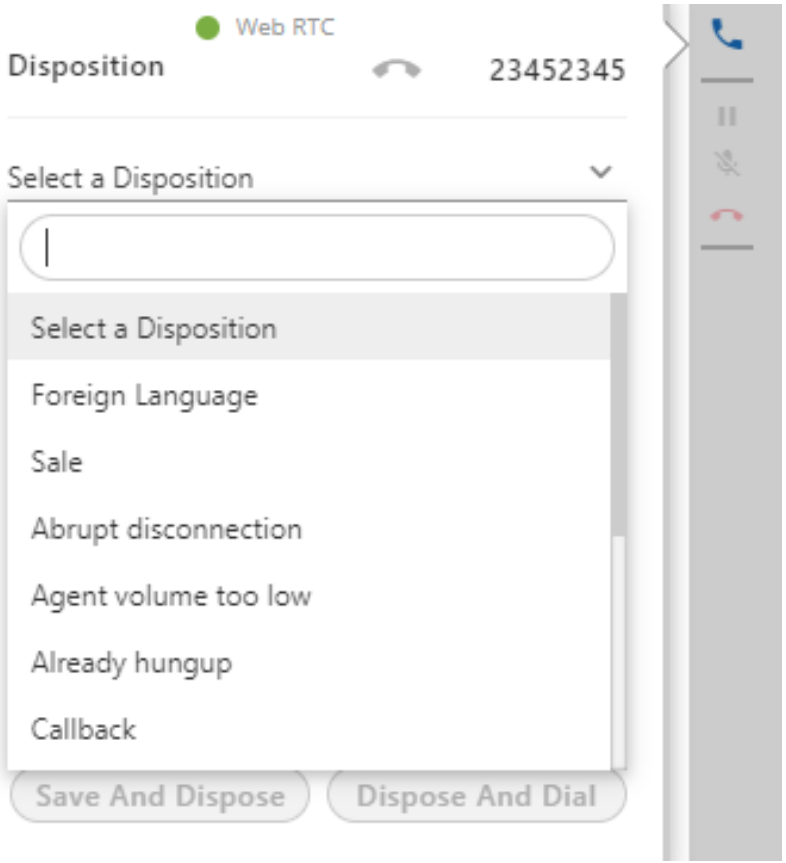


Figure: One-level Disposition

Enable One-level Disposition (If Required)

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

1. Execute the following command to login to the PostgreSQL Console and access the database.

   psql -U postgres ameyodb

1. Run the following query to disable the two-level disposition and enable the one-level disposition.

   INSERT INTO server_preference_store (context_type,context_id,key,value) VALUES ('campaign','<campaign_id>','showTwoLevelDisposition','false');

1. Run the following query to exit from the database.

   \q

> We have provided support of 100 characters for Disposition Class and Disposition Code.

19.1.8.6. DNC Tab

DNC

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

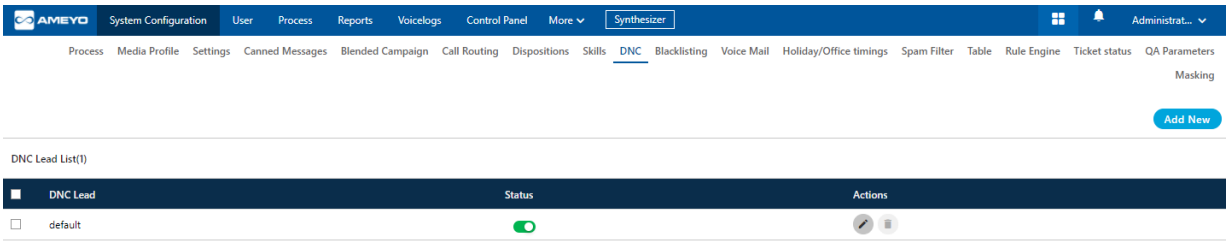


Figure: DNC Tab

Create DNC List

Administrator can perform the following steps to create a DNC List.

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

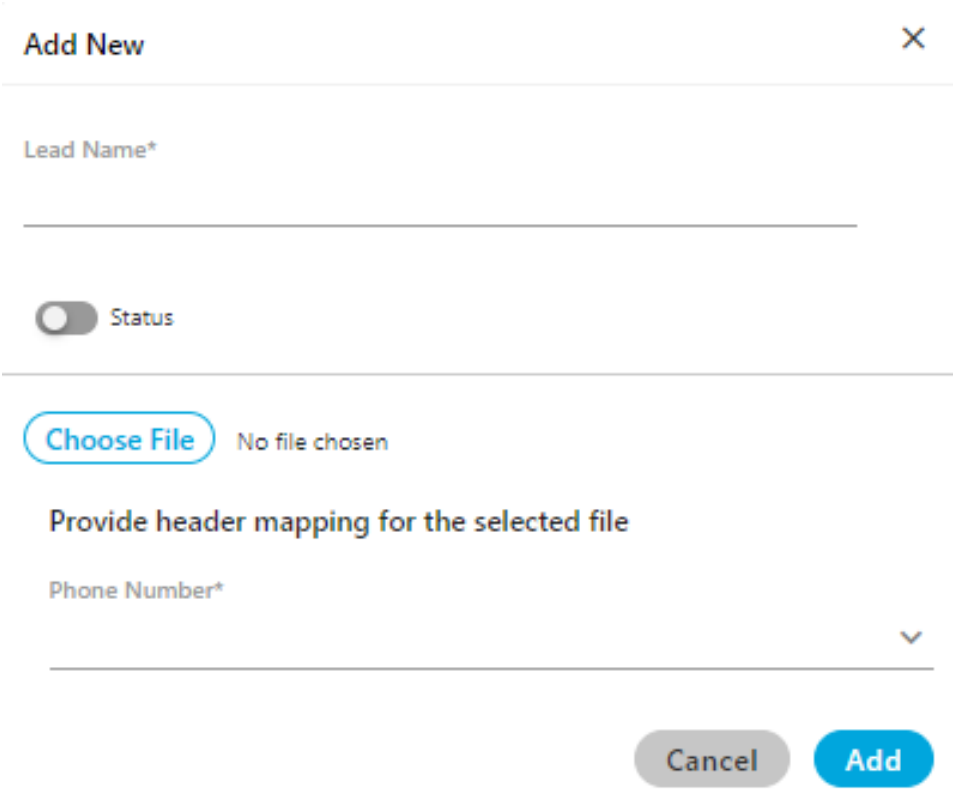


Figure: Add New DNC Lead

Here, you have to perform the following steps.

1. In Lead Name column, enter the name of the lead.
2. Toggle Status button to enable the new lead.
3. Click "Choose File" to select the location and the CSV file. Click "Open" button to upload that file.
4. In Header Mapping, Administrator can map the file headers of lead with phone1, phone2, phone3, phone4, phone5, timezone, and name headers as per the created headers in the system.

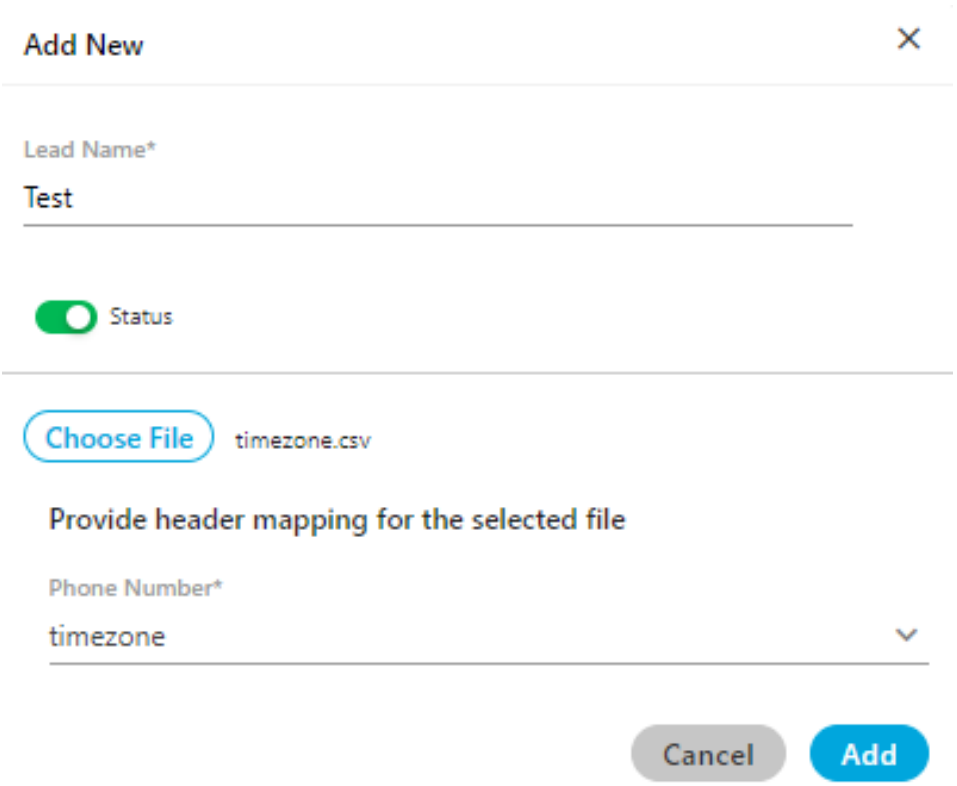


Figure: Sample DNC Lead

5. Click "ADD" to save the changes.
   Rather, you can click "Cancel" to discard the changes.

2. After clicking "ADD", a result modal is shown that provides the overview of the uploaded contacts through the DNC lead.

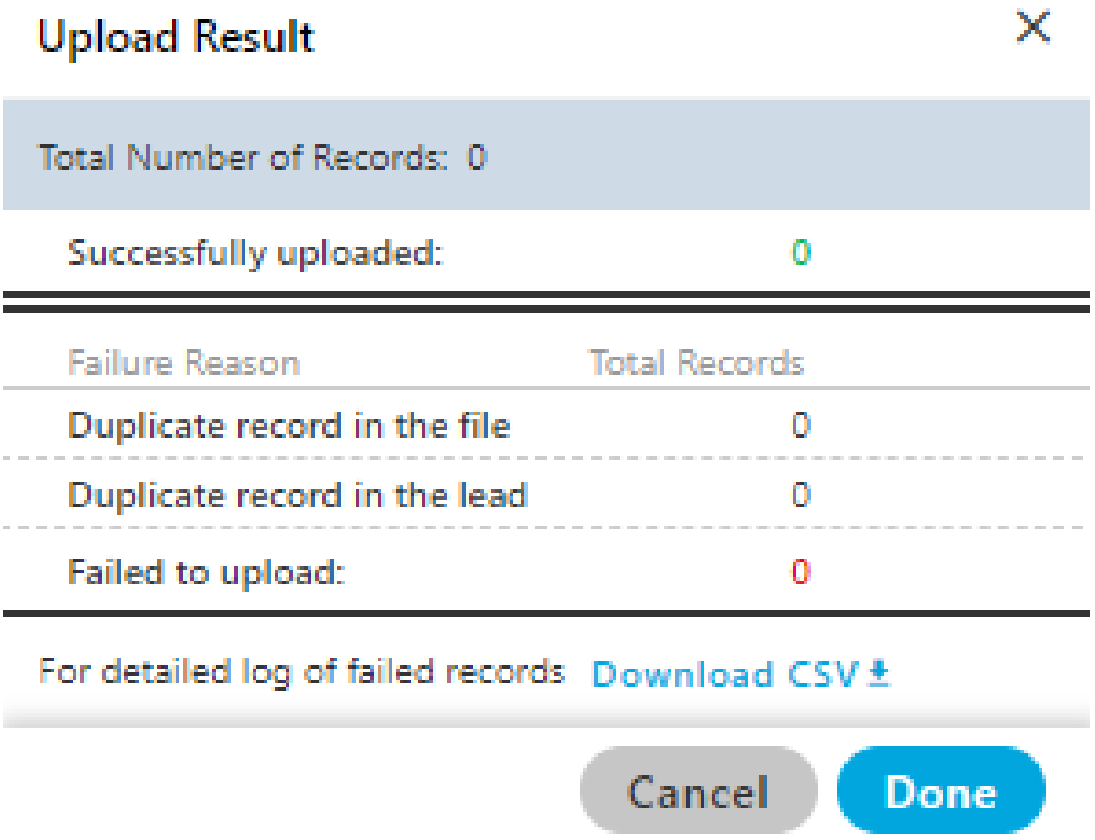


Figure: Upload Result Modal

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

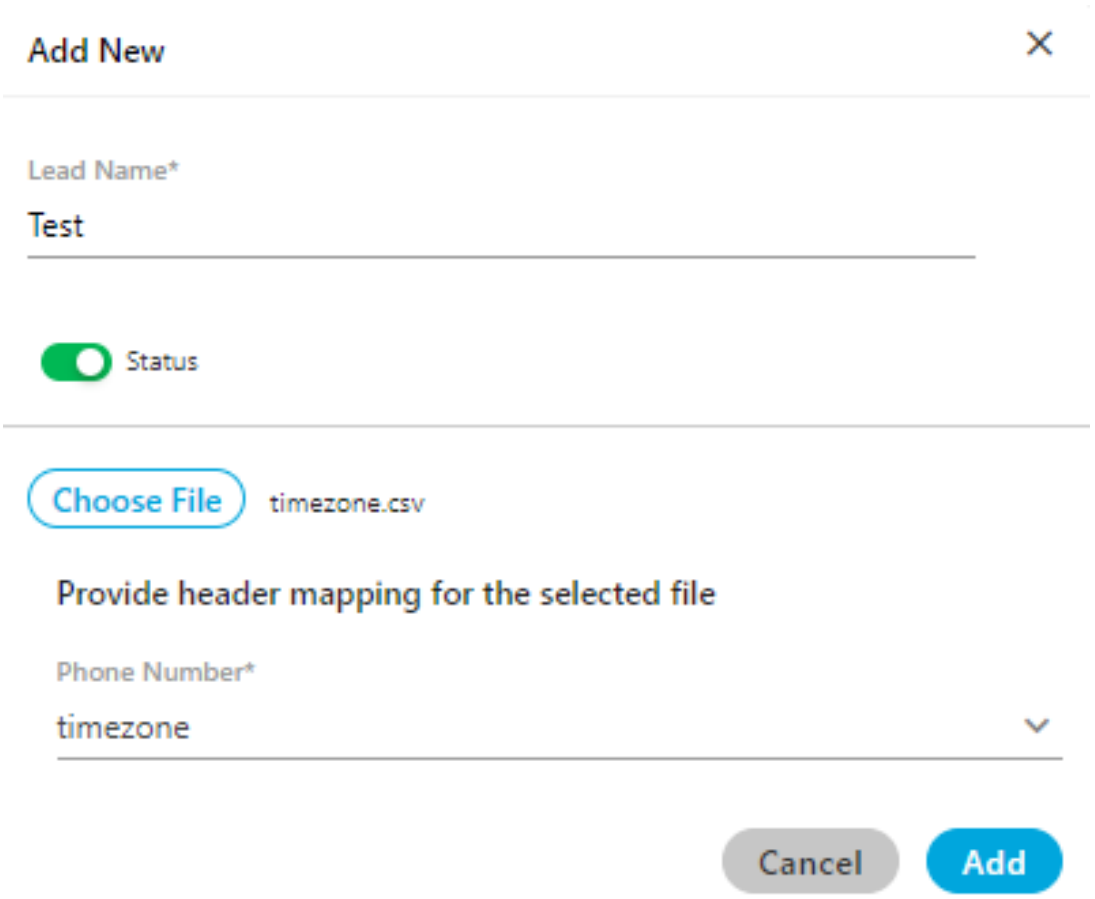
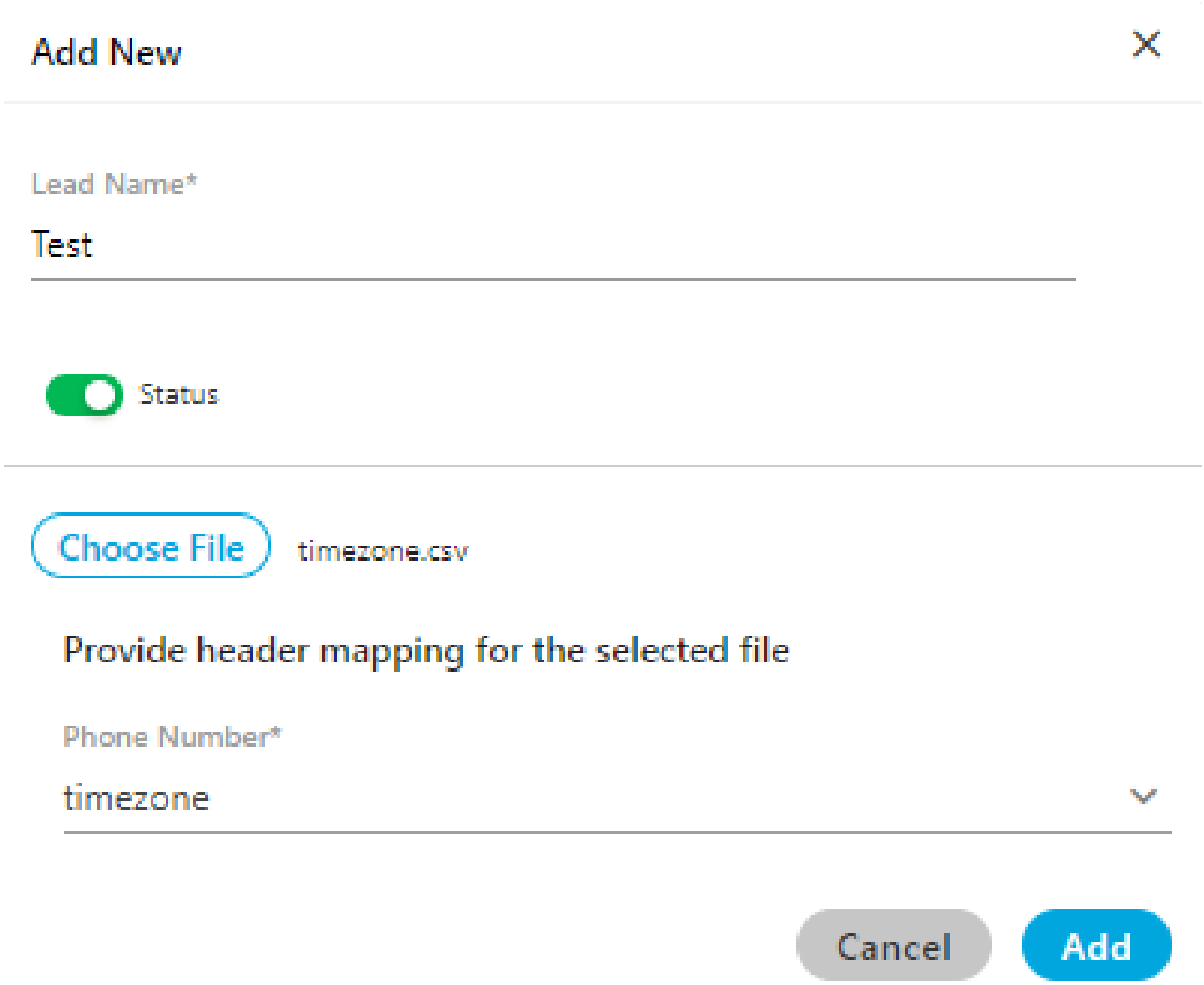


Figure: Edit DNC Lead

Edit a DNC Lead List

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



Delete an DNC Lead List

The deleted DNC lead cannot be retrieved back.

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

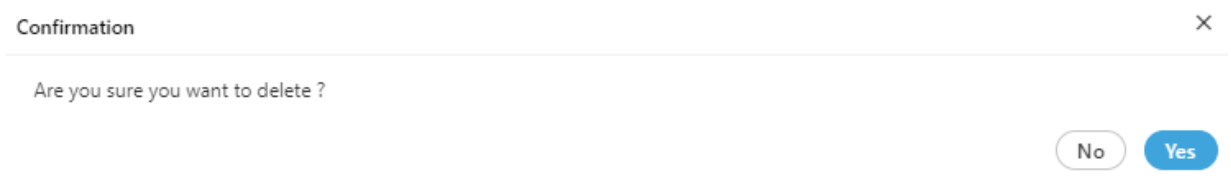


Figure: Delete DNC Lead

19.1.8.7. Blacklisting

Sometimes, customers misuse or abuse the users of the organization. Some of the customers also call repeatedly to the users, which hampers the working of the users. In such cases, the Administrator is able to blacklist the incoming calls of the customers. The contacts that have been added to the blacklist lead are not able to call the contact center. The organization can decide how to handle such customers differently.

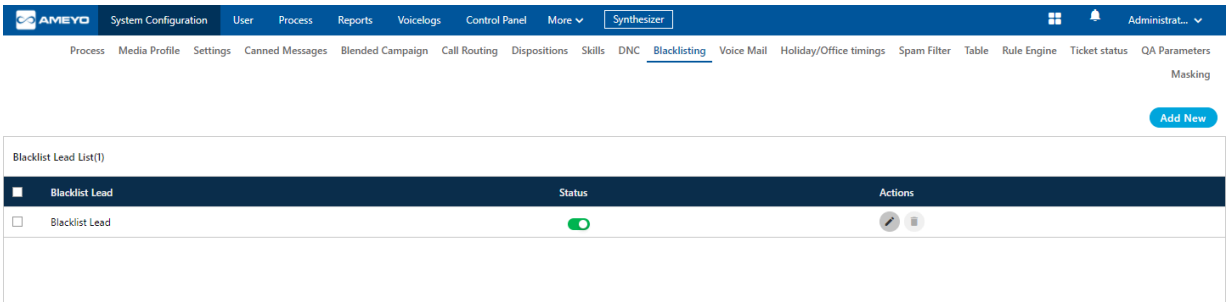
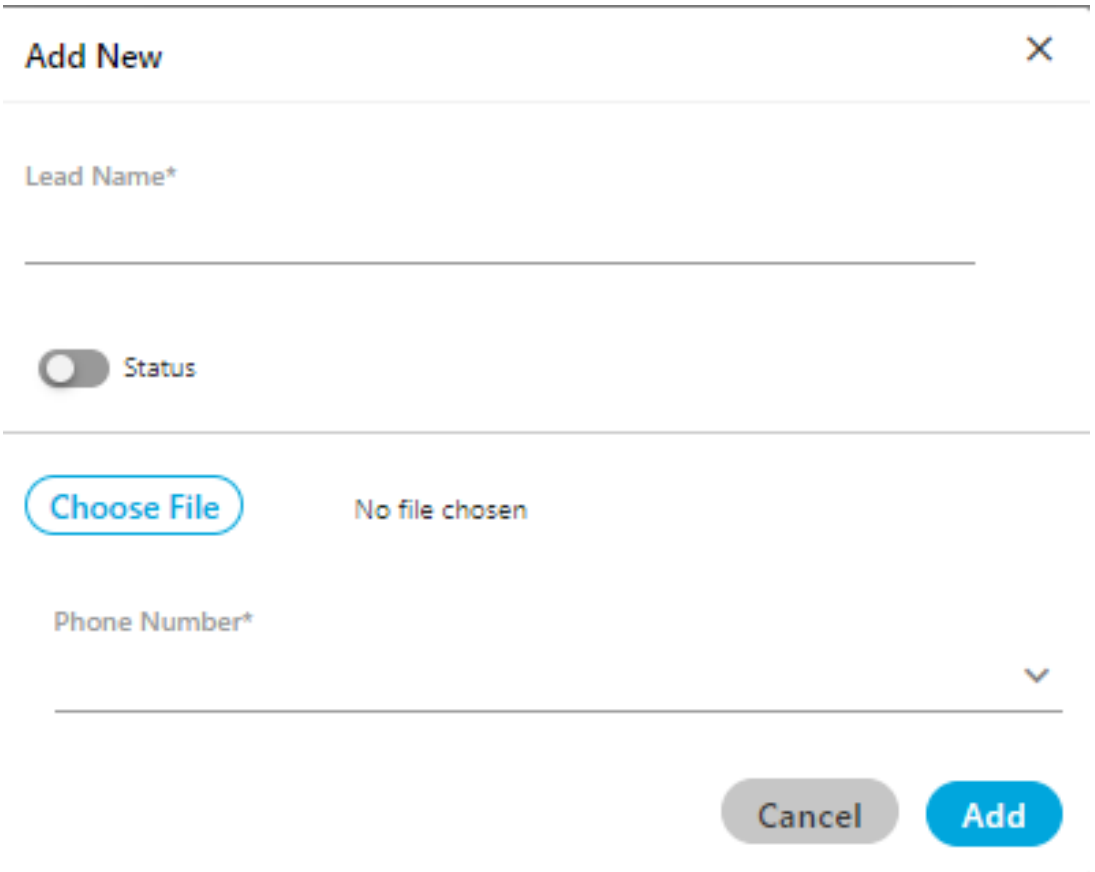


Figure: Blacklisting Tab

Add a new Blacklist Lead

Administrator can perform the following steps to add a new Blacklist lead.

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



Here, you have to provide the following information.

1. In Lead Name column, enter the name of the lead.
2. Toggle Status button to enable or disable the new lead.
3. Click "Choose File" to select the location and the CSV file. Click "Open" button to upload that file.
4. In Header Mapping, the administrator can map the file headers of lead with phone, timezone, and name headers as per the created headers in the system.

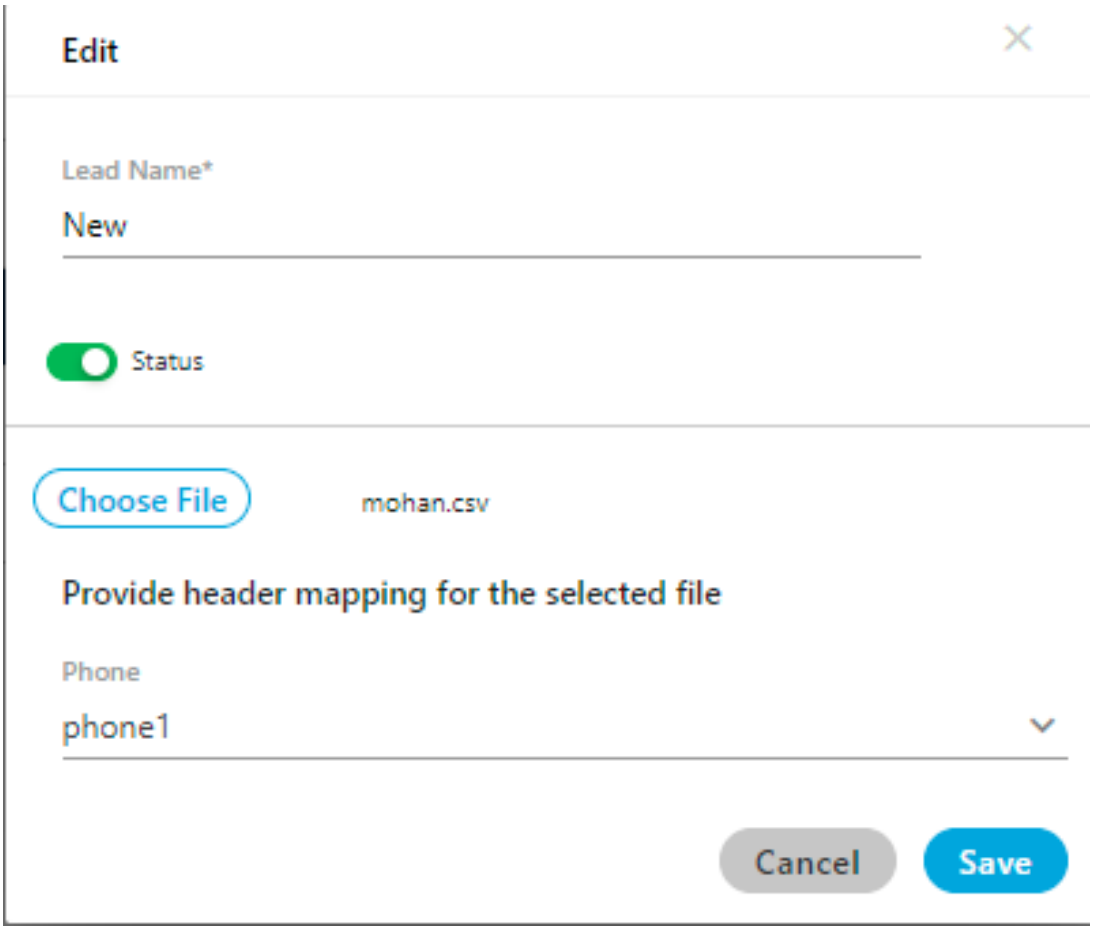


Figure: Sample Blacklist Lead

5. Click "ADD" to add a new lead.
   Rather, you can click "Cancel" to discard the changes.

2. After clicking "ADD", a result modal is shown that provides the overview of the uploaded contacts through the Blacklist lead.

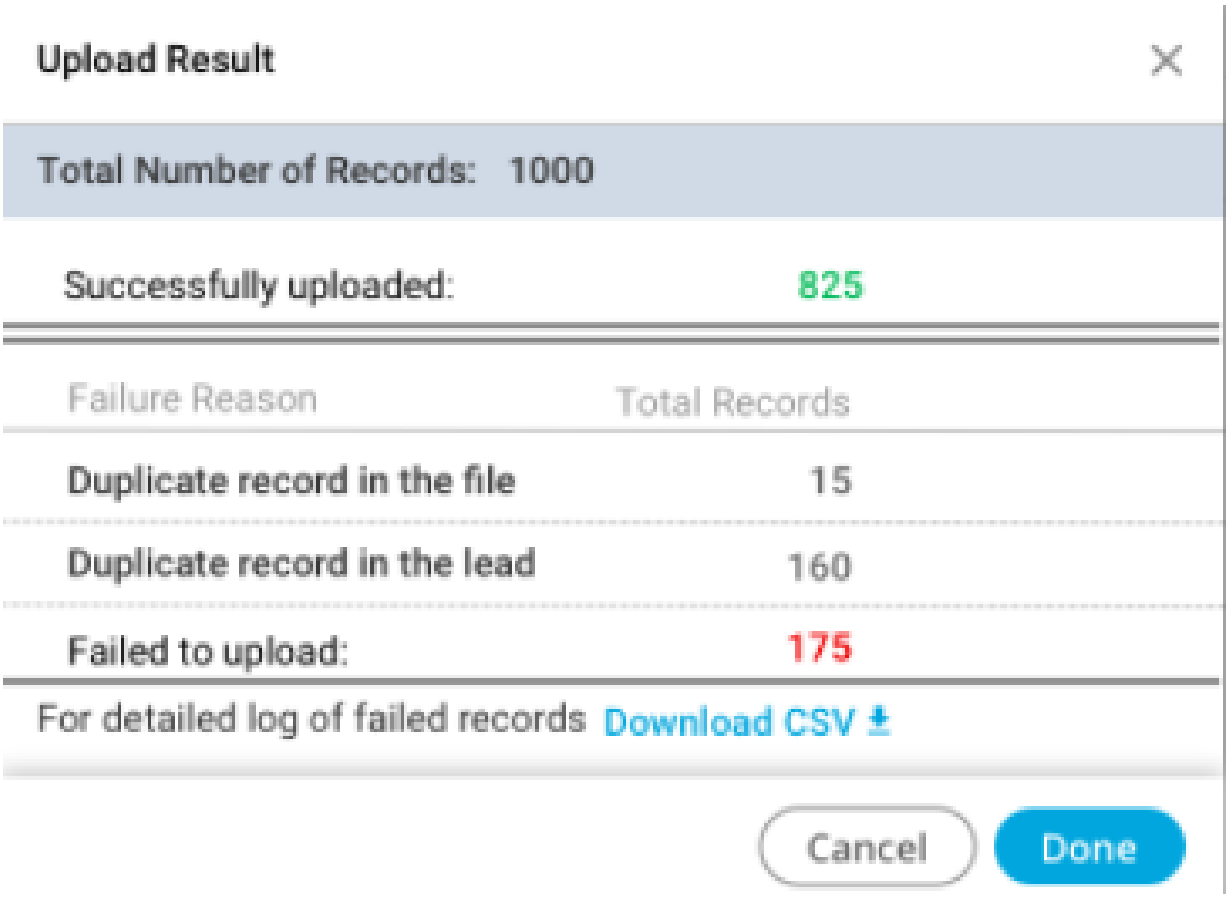


Figure: Upload Result Modal

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

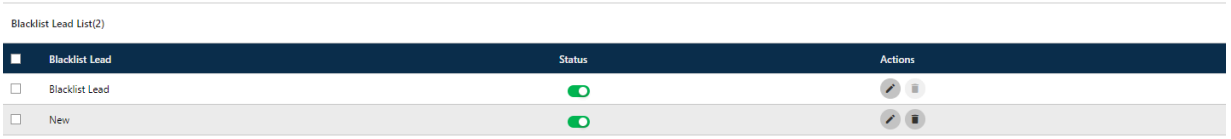


Figure: Upload Result Modal

Edit Blacklist Lead

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

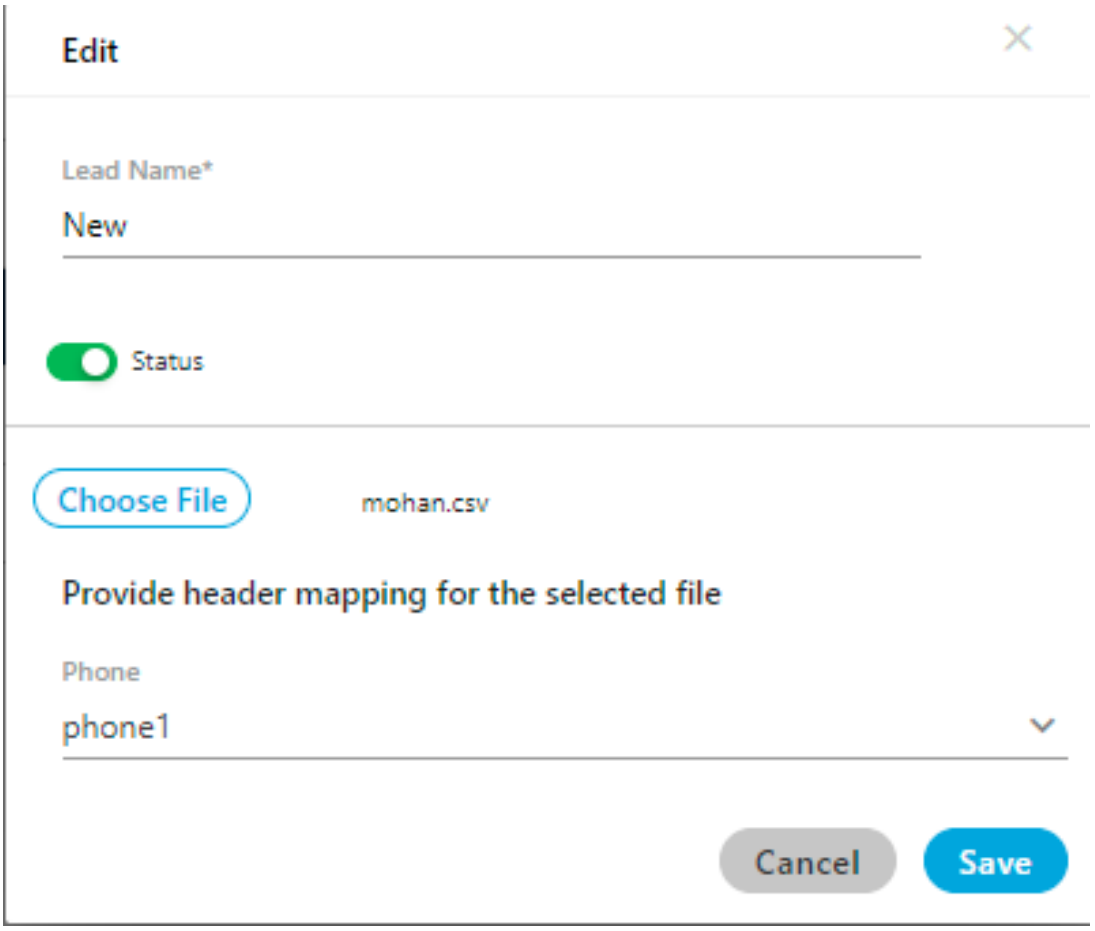


Figure: Edit Blacklist Lead

Delete an Blacklist Lead List

> The deleted Blacklist lead cannot be retrieved back.

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

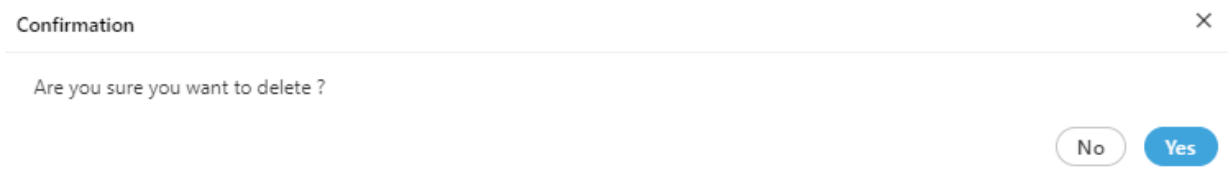


Figure: Delete Blacklist Lead

19.1.8.8. Holiday/Office Timings (Licensed Feature)

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

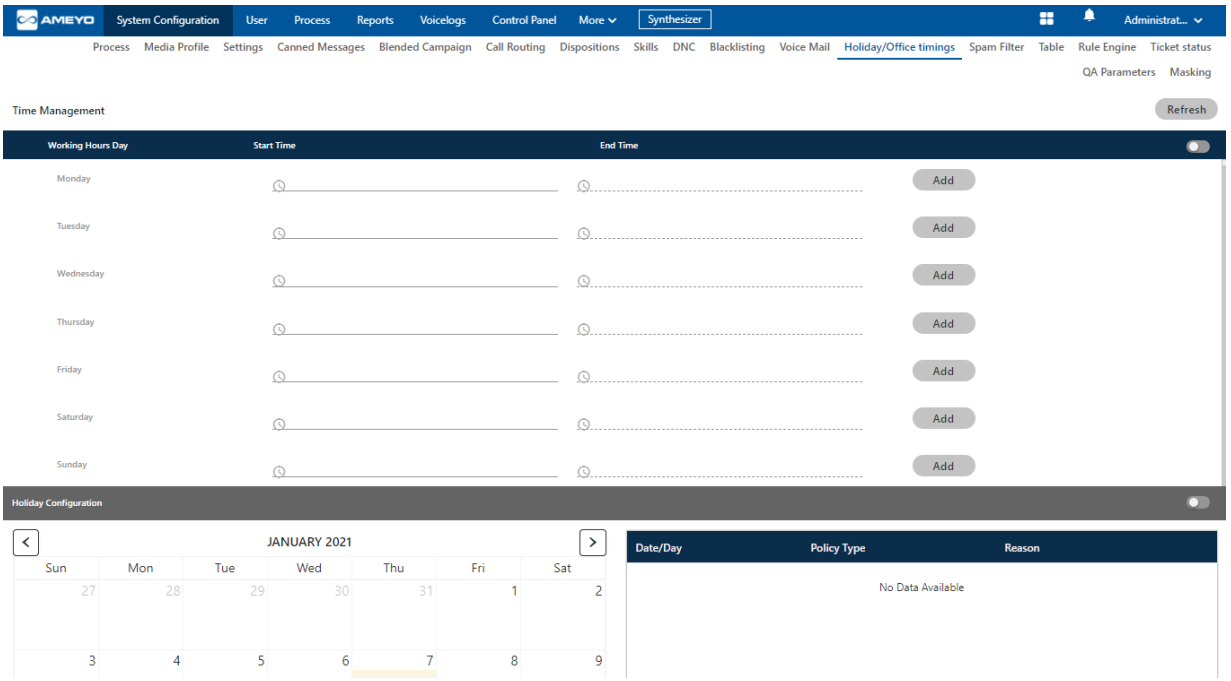


Figure: Holiday/Office Timings Tab

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.

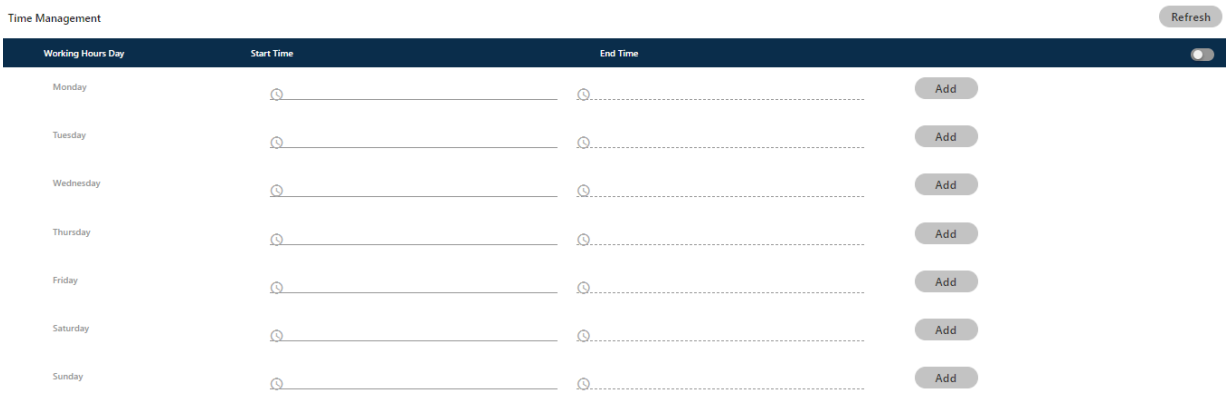


Figure: Define Working Hours

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

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

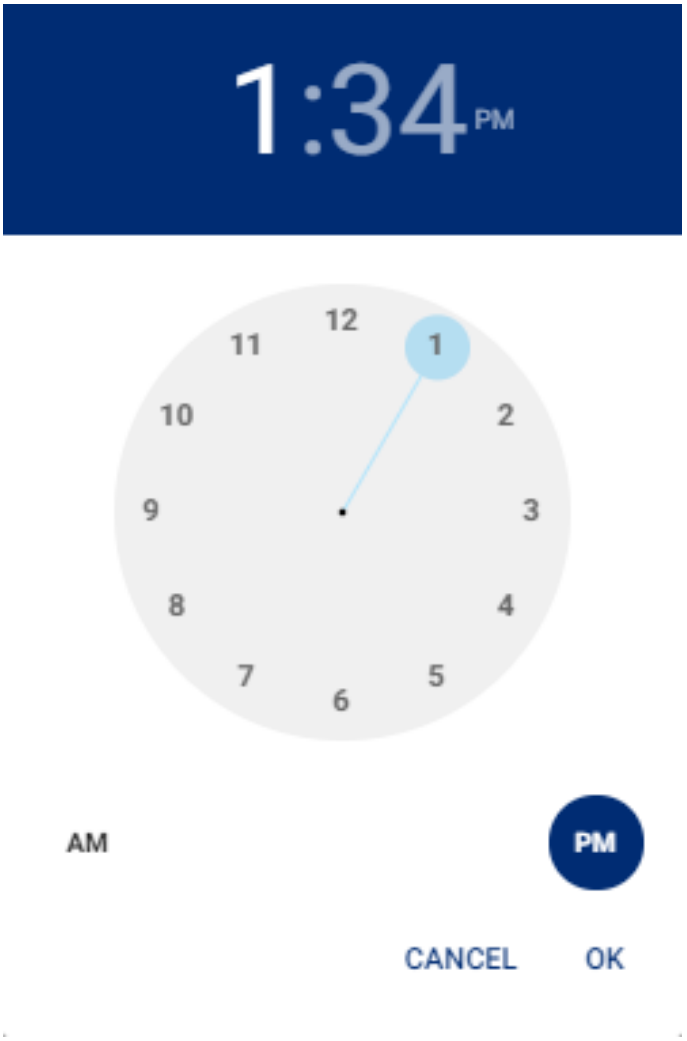


Figure: Select Time

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

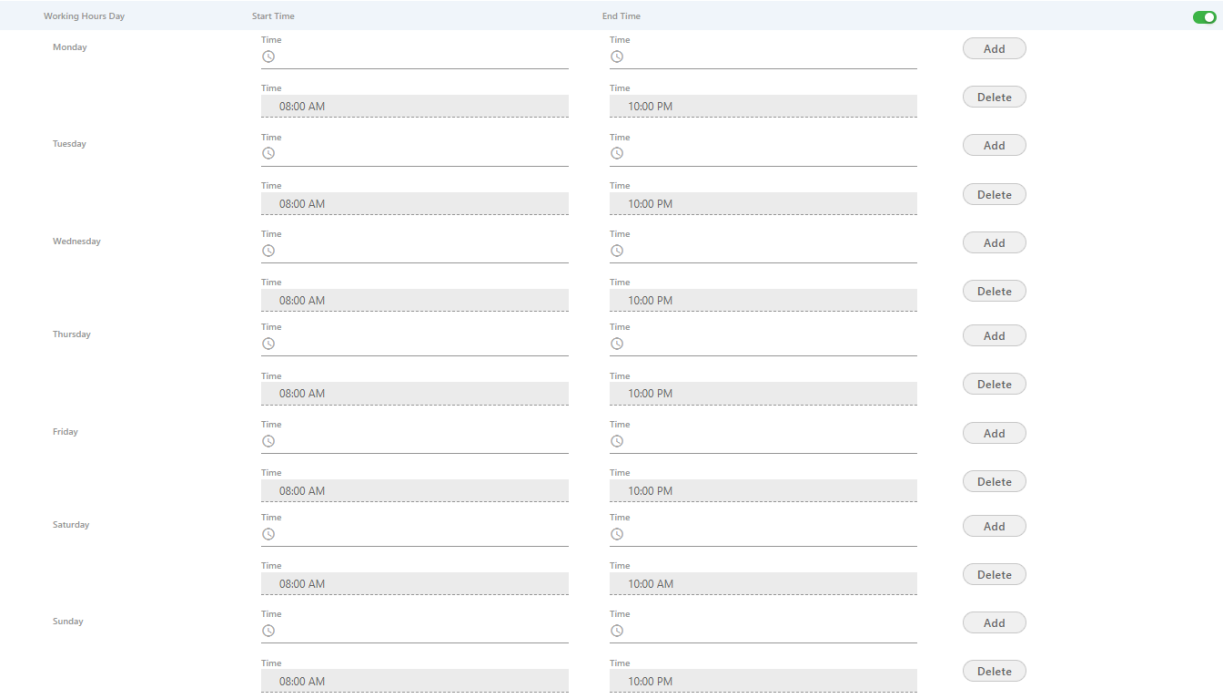


Figure: Defined Working Hours

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

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.

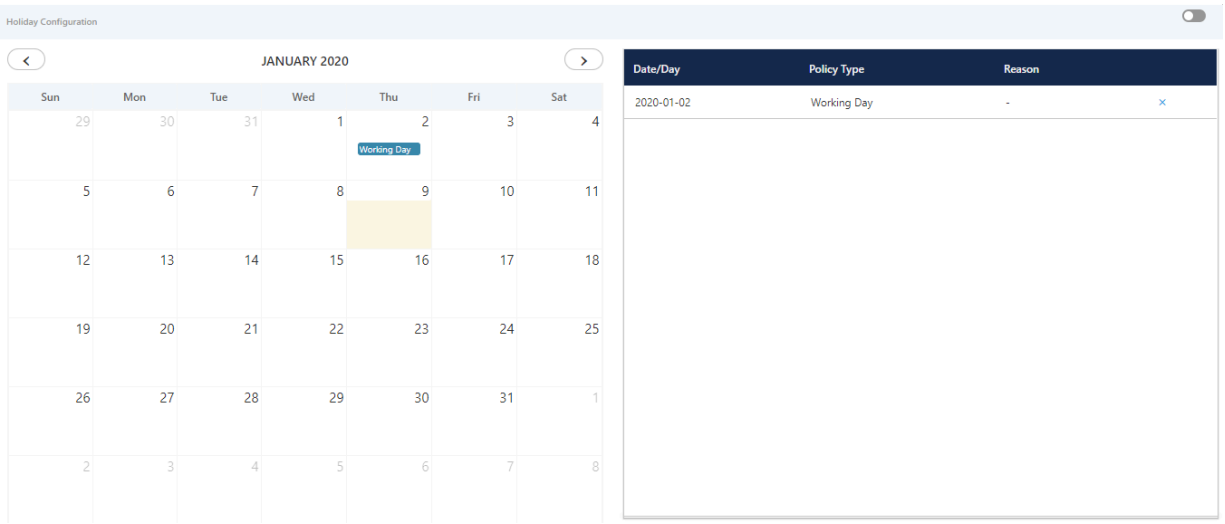


Figure: Holiday Configuration

Perform the following steps.

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

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

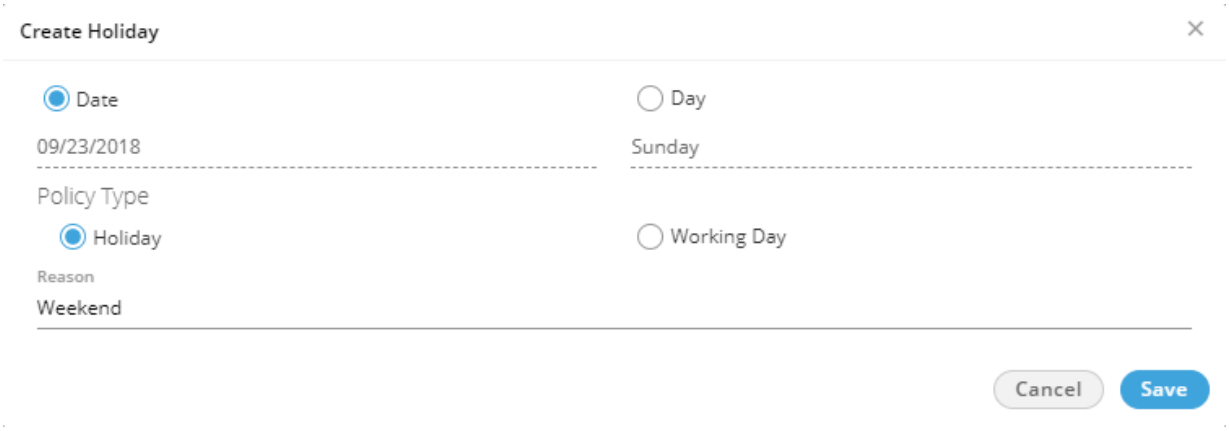


Figure: Create Holiday or Working Day

3. **Date:** Click "Date" if you only want to mark the selected date as Holiday or Working day. After selecting it, select any of the following options.Click "Save" to mark it as the selected option.
    - **Holiday:** Click it to mark the selected day as a holiday.
    - **Working Day:** Click it to mark the selected day as a working day.
4. **Day:** Click "Day" if you want to want the holiday or working day to repeat on the same day.

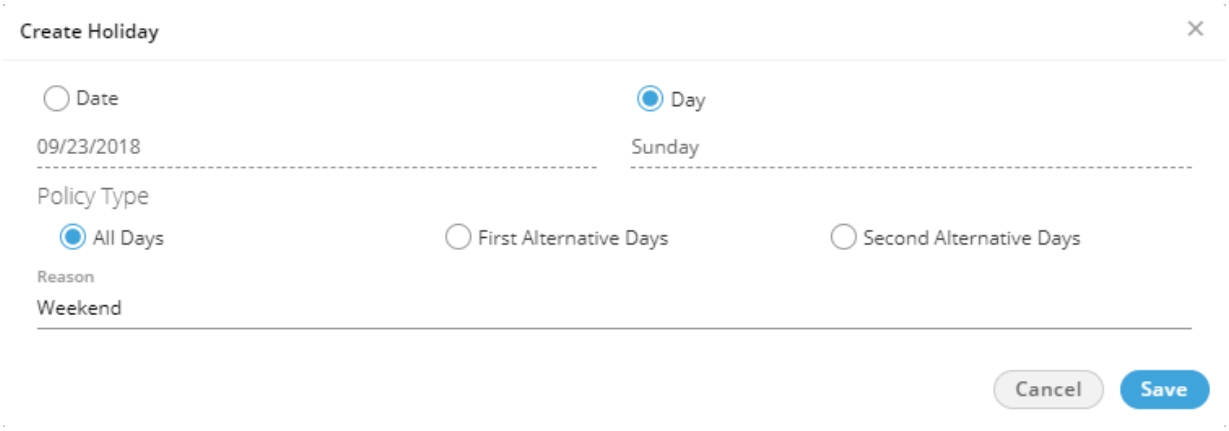


Figure: Create Reoccurring Holidays

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 means if the holiday is marked on the first week then the next holiday on the same day will be on the third week. There will be no holiday in the second week on the selected day.
>
> Here, you can select whether to start alternate holidays on the first week or second week.

- **First Alternate Days:** Select it to start the alternate holidays on the selected day from the first week itself.
- **Second Alternate Days:** Select it to start the alternate holidays on the selected day from the second week itself.

5. Provide a reason to create a holiday or weekday.
6. Click "Save" to save the day.
   Rather, you can click "Cancel" to discard it. The selected holiday will be listed on the right side section.

Following is a sample screenshot.

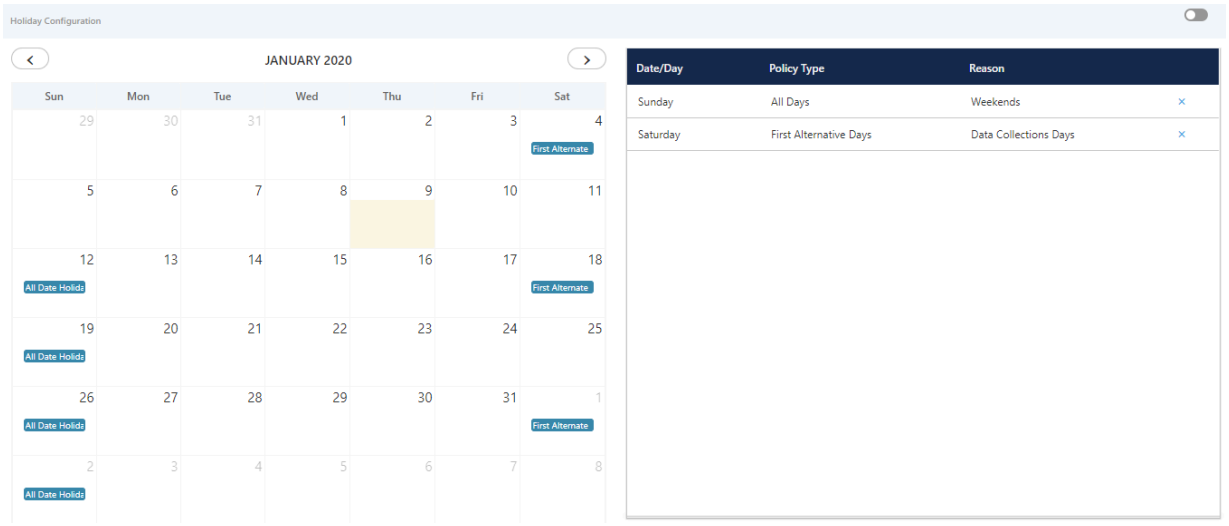


Figure: Created the holidays

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

Holiday Office Hour Restriction in Non-Office Hours

In cases where the agent schedules a callback call beyond the office hour timing, the callback calls fail, which leads to a high count in the failed callback attempt. Also, when the

operations team does not want to initiate or handle callback and inbound/outbound calls together, a window where they can define the callback start and end time for scheduling the callback calls is very useful. Holiday/Non-office hours configuration are provided for callback calls. Administrators can configure the same at both system and campaign level. If the configuration is done at both levels, then the campaign-level configuration overrides the system-level configuration.

Administrator can perform the following actions:

1. Add and edit callback hours

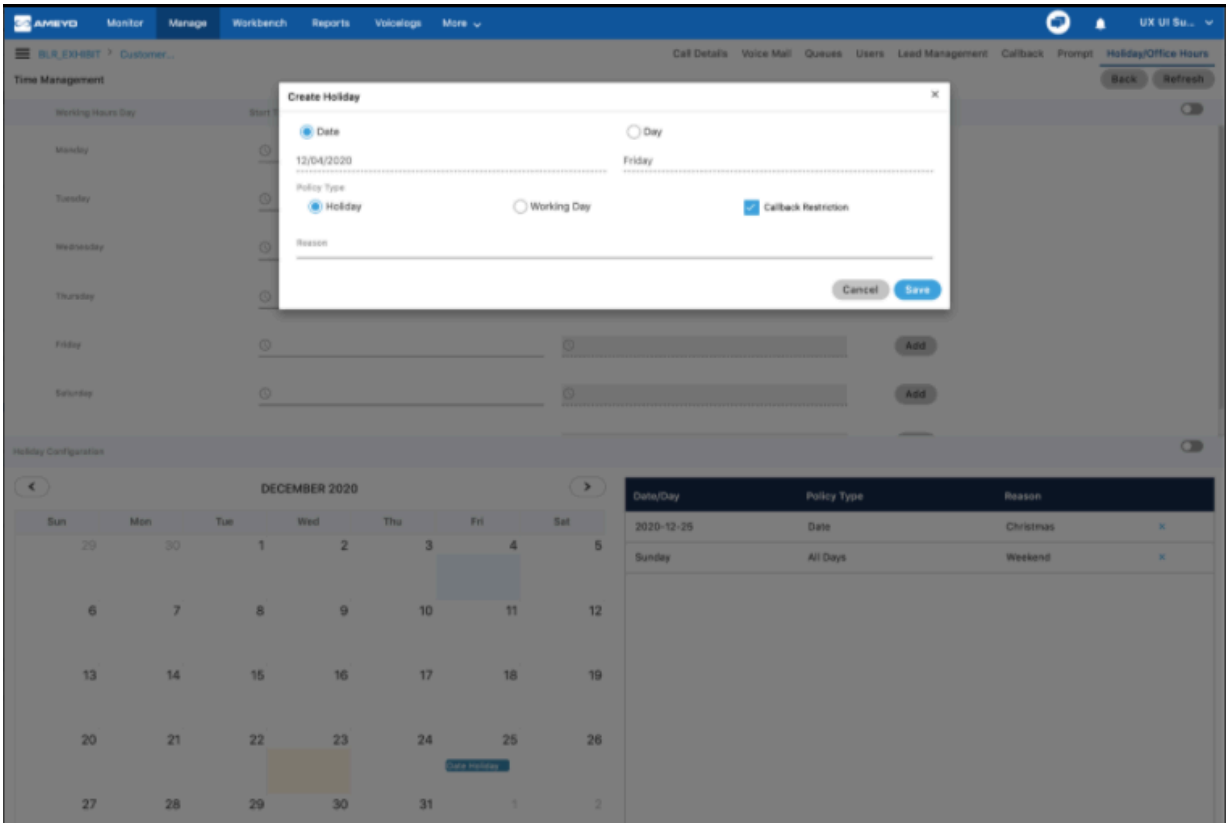


Figure: Adding or Editing Callback Hours

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

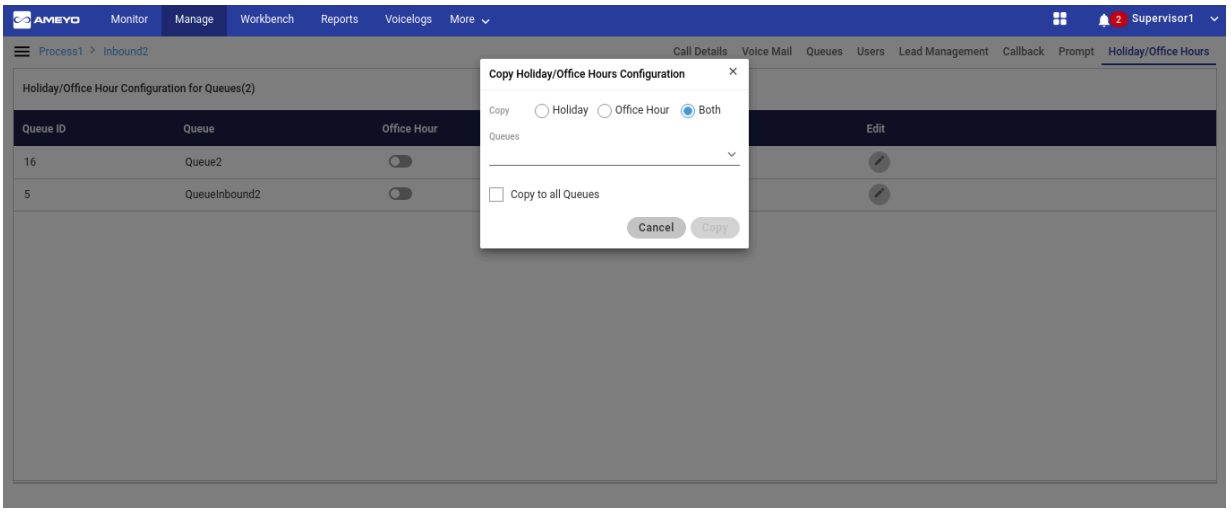


Figure: Copying Callback Configuration

For both agent and supervisor, when adding a callback, if the agent selects a time that is marked as holiday/non-office hours, then the holiday dates are disabled on the calendar and an error message is displayed.

In case a callback is scheduled and later the administrator changes the holiday/non-working hours so that the call scheduled time falls under the non-permissible time, then the callback is initiated in the next working hour.

19.1.9. Call Manager

A call manager is a particular form of application server that manages the setup or connection of telephone calls. The call server will receive call setup request, determine the status of destination devices, check the authorization of users to originate and/or receive calls, and create and send the necessary messages to process the call requests.

Commands to Configure Call Manager

To use the Call Manager in Administrator Interface, you have to execute the following commands sequentially at the server operating system where Ameyo Server is installed.

`psql -U postgres <Ameyo_Database_Name>`

```
INSERT into server_preference_store(context_type,context_id,key,value) VALUES
('contactCenter','<contact_Center_Id>','callManagerSlot','<Protocol>//<Domain
_Name_OR_IP_os_Server>:<PORT_Number>/app/build');
```

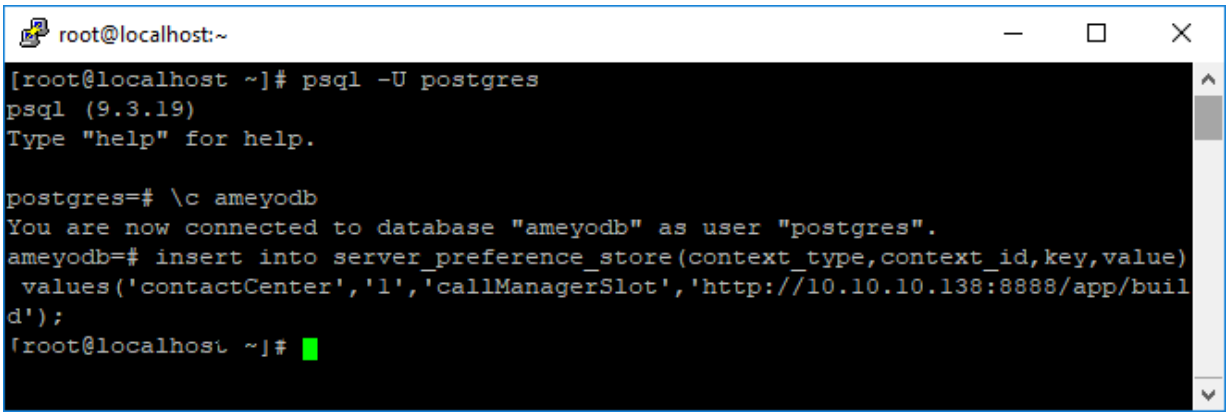


Figure: Commands to enable Call Manager

Now, go to "System" → "System Configuration" → "Settings" → "System Settings". Scroll down and click "Reload" button for "Reload Server Preference Store" to enable "Call Manager" tab on Administrator Console.

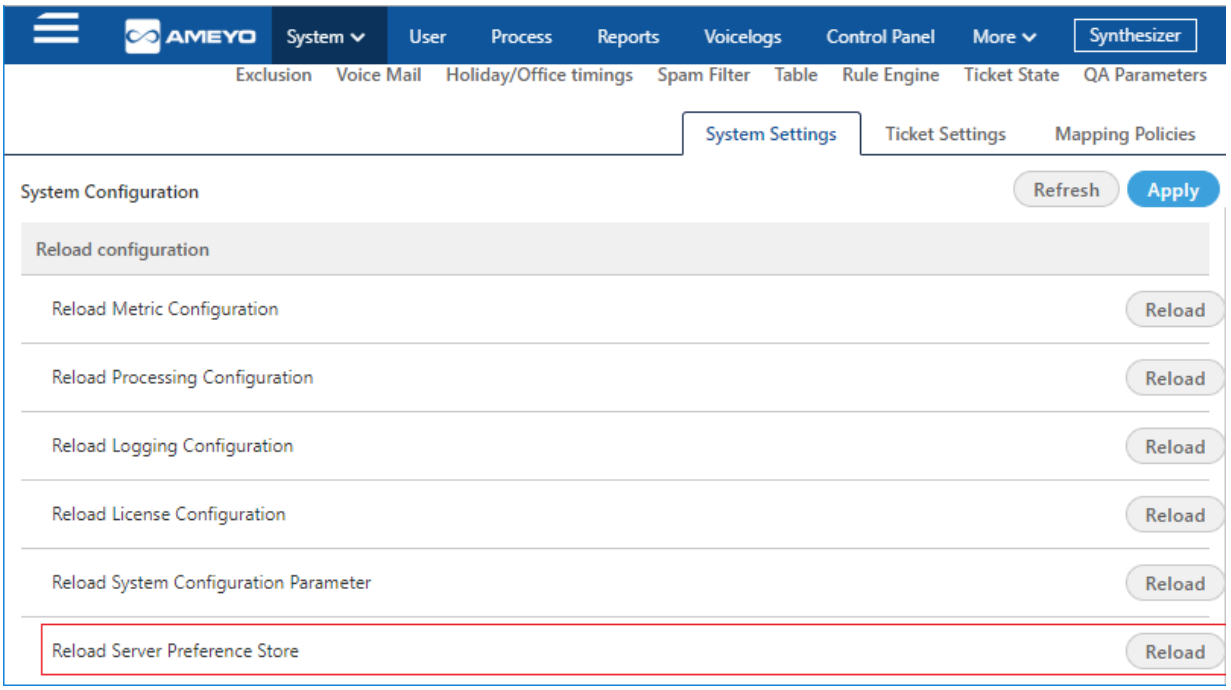


Figure: Reload Server Preference Store

After reloading the Table, now re-login to Administrator Console to view Call Manager tab.

After relogin, go to More → Call Manager to view the Call Manager app. The following two sub-tabs are present here.

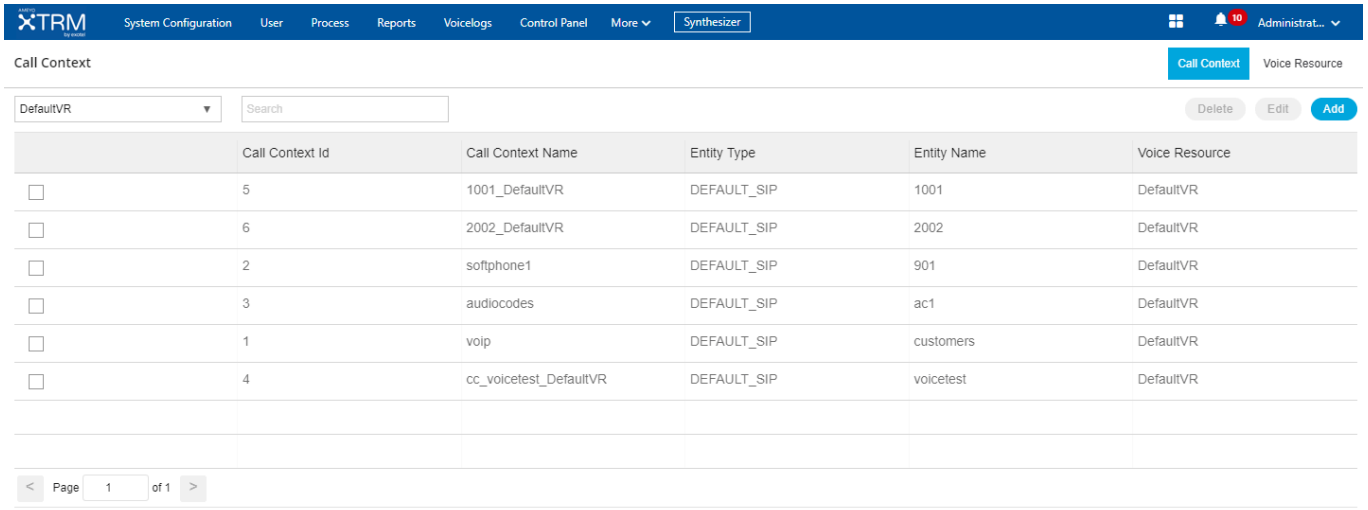


Figure: Call Manager Tab in Administrator Interface

1. **Call Context Tab**
2. **Voice Resource Tab**

Disconnecting the Call when Voicelog Recording Fails

Businesses need Voicelogs for the following reasons:

1. Quality and training purpose
2. Compliance
3. To respond to legal issues raised by consumers
4. For legal pursuits in case the consumer has misbehaved or provided false information.

However, recording may encounter errors such as:

1. Disk full
2. Permission denied
3. Codec errors including a bug or an unhandled packet

In case of recording failures, a notification is sent to the relevant users. But, the admin misses out on handling these cases and hence a loss of Voicelogs may occur. To prevent this loss, the Admin can prevent the call to continue in case of recording failures and the loss of Voicelogs can be prevented.

For manual dial, the ongoing calls are disconnected if there is an error in voicelogs recording, and further calls are prevented for some time so that the stakeholders can do the needful and resolve the issue.
When an ongoing call is disconnected, the user is notified about the same. Notification is sent to the users and stakeholders, including supervisor and administrator. These notifications are of three types:

1. Bell icon
2. Toast notifications
3. Desktop notification in case the user is not on the agent's tab.

Once the error is fixed, the agent can perform manual dials. A consolidated notification is sent to stakeholders regarding the error that occurred during voicelog recording. By default, the consolidated message is sent after 10 failed calls. This unit is configurable.

In case of voicelog recording failure for inbound calls, the calls are disconnected and notification is sent to the users. The customer is also notified by playing a fixed message. This message is not configurable. The message does not require a specific configuration or prompt to be uploaded, and it works by default.

For auto dial, in case of multiple call failures, the auto dialer gets turned off and a notification is sent to the stakeholders informing the reason behind it. Wherever the issue is fixed, the auto dialer is turned on and a notification is sent to the stakeholders.

In the DB, the calls failing due the error in voicelog recording can be tracked in the call history table. hangup_details field has been introduced for vocielogs recording failures.

If the flag, isRecordingNeeded, is set as true and the voice resource recording state is down due to some error in voicelog recording, then the user can not initiate or receive any further calls. If the flag is false and the voice resource recording state is down due to some error in voicelog recording, the agent can initiate outbound calls and all other types of calls will also work fine.

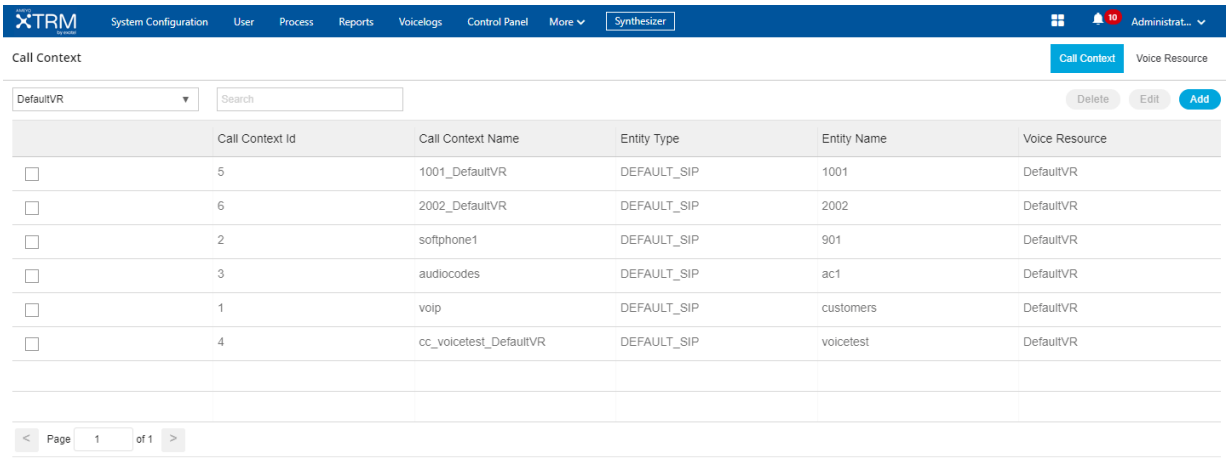
The following are the recording states:

1. Voice Resource
2. Call Context
3. Failover Policy Call Context

These states are available initially. After the monitor status event failure, these recording states are made unavailable. Once the timer job runs successfully or the voice resource is reloaded, these recording states are made available again.

19.1.9.1. Call Context Tab

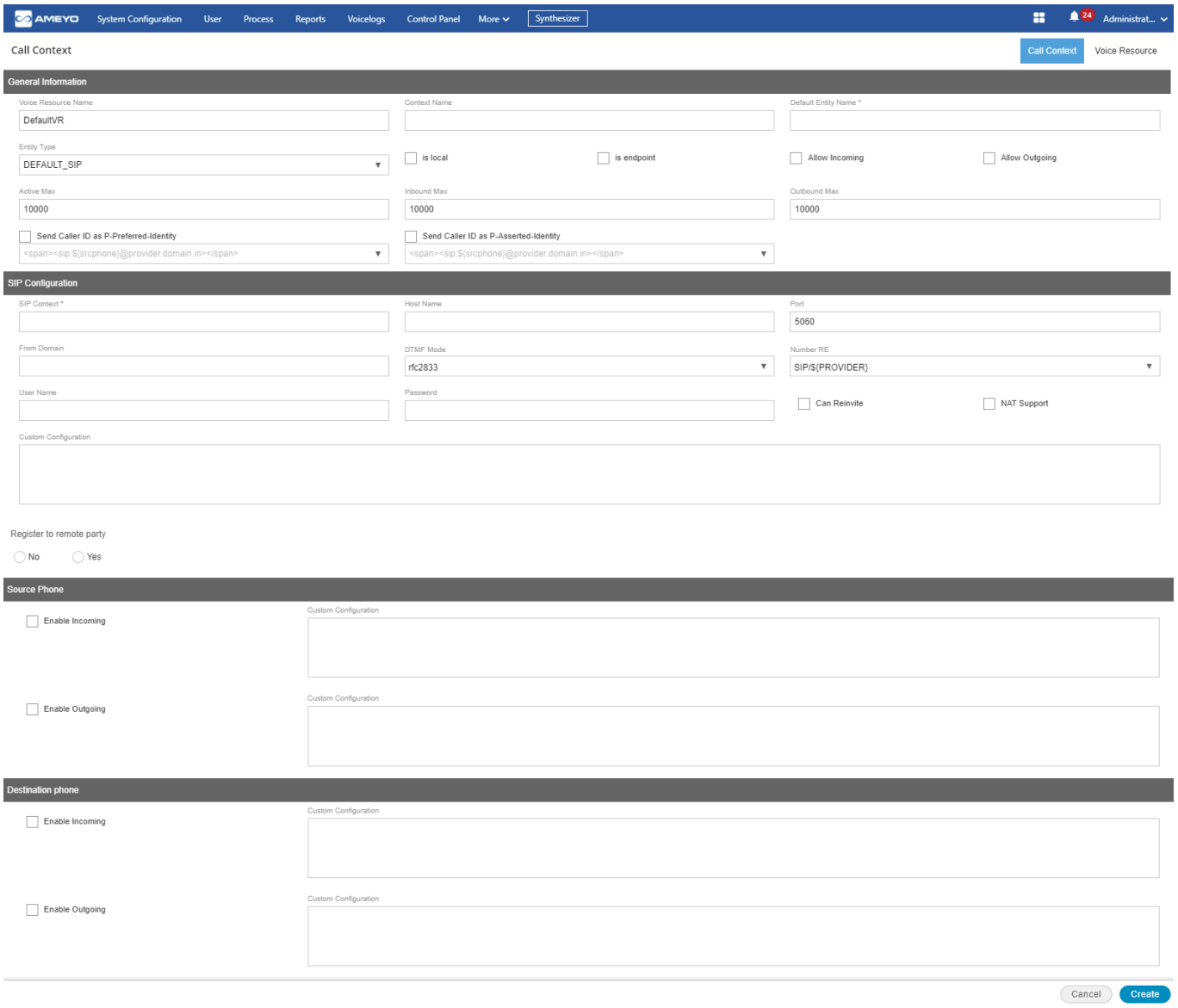
Call context is basically the SIP channel that will be used by the agent to initiate the calls.



Add a Call Context

Perform the following steps to add a Call Context.

1. Click "Add" to add a call context. The following page is displayed.



2. In "Voice Resource Name" drop-down menu, select a voice resource. If no custom voice resource is added, keep "DefaultVR" selected in this menu.
3. Provide the Context Name of the SIP entity.
4. Provide a name for the entity.
5. Select any of the following entity type.We are selecting "DEFAULT_SIP" in this test case.
    - DEFAULT_SIP
    - DEFAULT_ZAP_TRUNK
6. **Is Local:** If this is checked then entity will be visible to the Agent.
7. **Is Endpoint:** No other agent can select that entity.
8. **Allow Incoming:** Allow incoming calls using the selected call context. If not set, then the incoming calls on this call context would be automatically rejected.

9. **Allow Outgoing:** Allow outgoing calls using the selected call context. If not set, then the request for outgoing calls on this call context would be rejected.
10. **Active Max:** Maximum allowed active channels. It allows system not to maintain active calls beyond the configured range with this call context.
11. **Inbound Max:** Maximum allowed incoming channels. It allows system not to receive incoming calls beyond the configured range with this call context.
12. **Outbound Max:** Maximum allowed outgoing channels. It allows system not to dial outgoing calls beyond the configured range with this call context.
13. **Send Caller ID as P-Preferred-Identity:** Enable the checkbox, if you want to send the callerID as the P-Preferred-Identity. After enabling it, select the identity from the available drop-down list.
14. **Send Caller ID as P-Asserted-Identity:** Enable the checkbox, if you want to send the callerID as the P-Asserted-Identity. After enabling it, select the identity from the available drop-down list.
15. In SIP Configuration section, provide the following details about the SIP.
    - **SIP Context:** The context of a SIP entity.
    - **Hostname:** The hostname or IP address of client host.
    - **Port:** The communication port of SIP entity.
    - **From Domain:** Set the domain name if the client host is behind the NAT or Domain.
    - **DTMF Mode:** DTMF mode supported by the SIP Entity.
    - **Number RE:** Select any of the following number patterns to connect with the receiver.
      - SIP/Provider: SIP/${PROVIDER}
      - SIP/Number@Provider: SIP/${NUMBER}@${PROVIDER}
    - **Username:** The username of the client. If client SIP entity requires authentication.
    - **Password:** Authentication password to connect with SIP client.
    - **Can Reinvite:** SIP Entity to allow SIP Reinvites. Select the checkbox to enable reinvite.
    - **NAT Supported:** If NAT (Network Address Translation) is supported on the SIP Entity. Select the checkbox to enable reinvte.

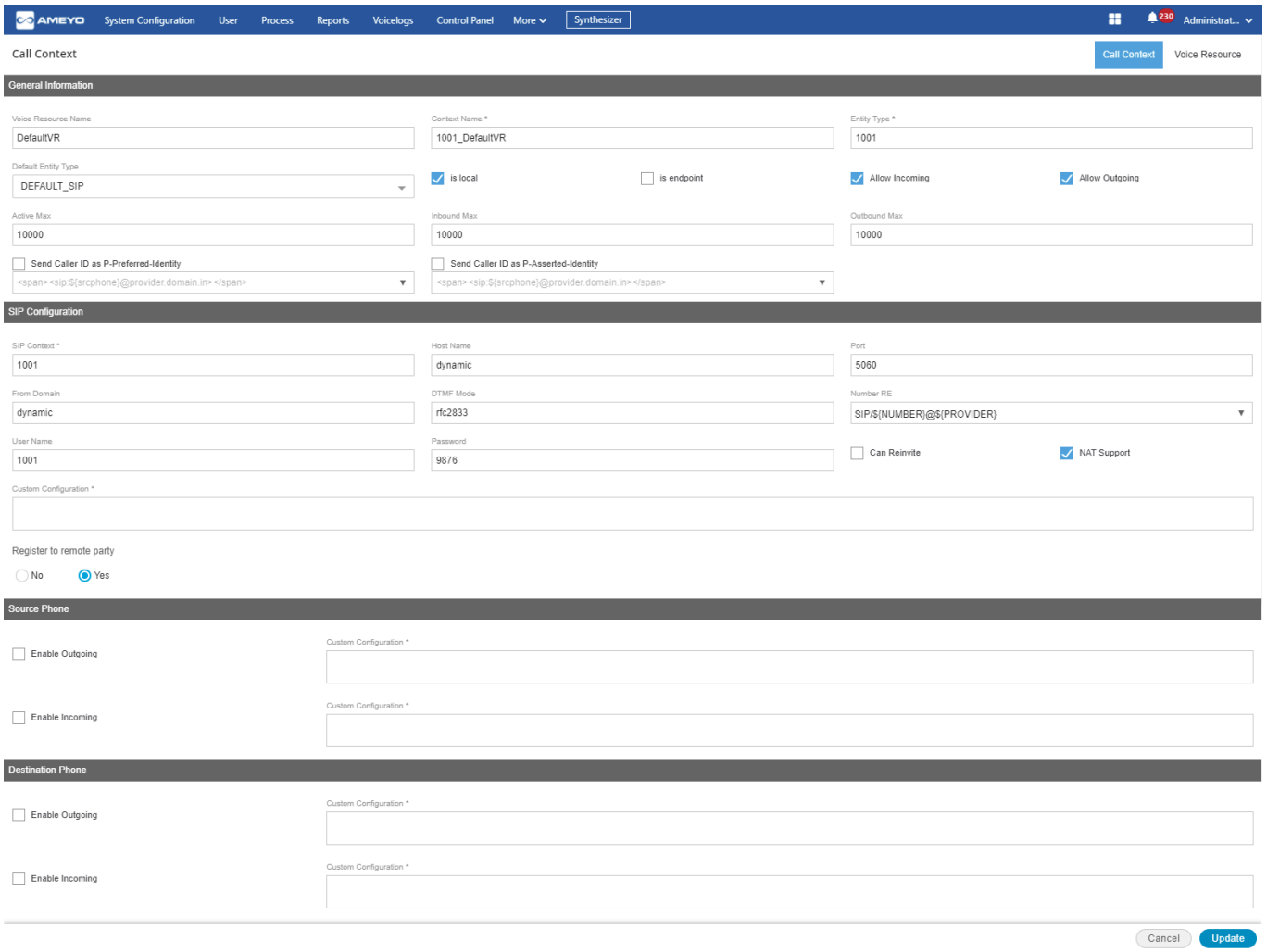
- **Custom Configuration:** This field is used to configure specific parameters allowed only for a particular SIP entity.
- **Register to remote party:** Select "Yes" radiobutton, if you want to register this SIP to the Remote Party also.

16. **Source Phone:** You can enable outgoing and incoming for the Source Phone. You can also provide the custom configuration.
17. **Destination Phone:** You can enable outgoing and incoming for the Destination Phone. You can also provide the custom configuration.
18. Click "Create" button to create a new Call Context.

Edit the Call Context

Perform the following steps to edit the Call Context

1. Select the Call Context which you want to edit.
2. Click "Edit" button present at the top right corner of the page.
3. The following page arises on which you can edit the entries of the call context.



Delete the Call Context

If you want to delete the Call context then, click "Delete" button present at the right top of the page, to delete the call context

> However, do not delete a Call Context that is being used in any campaign for calls. The deleted Call Context cannot be restored.

19.1.9.2. Voice Resource Tab

This tab lets you configure the Voice Resources. These are asterisk call servers where we can configure the SIP/ VOIP minutes and PRI (Zap Trunk).

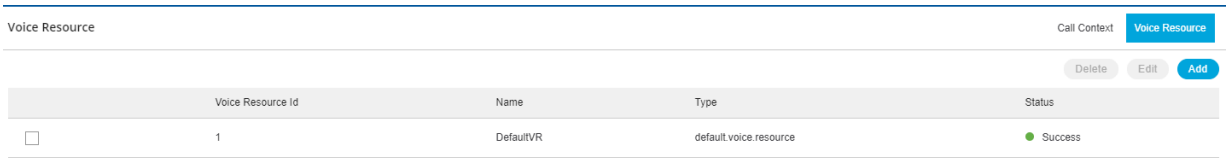


Figure: Voice Resource Tab

Add a Voice Resource

Perform the following steps to add a new Voice Resource.

1. Click "Add" button present at the right top of the page. The following page is displayed.

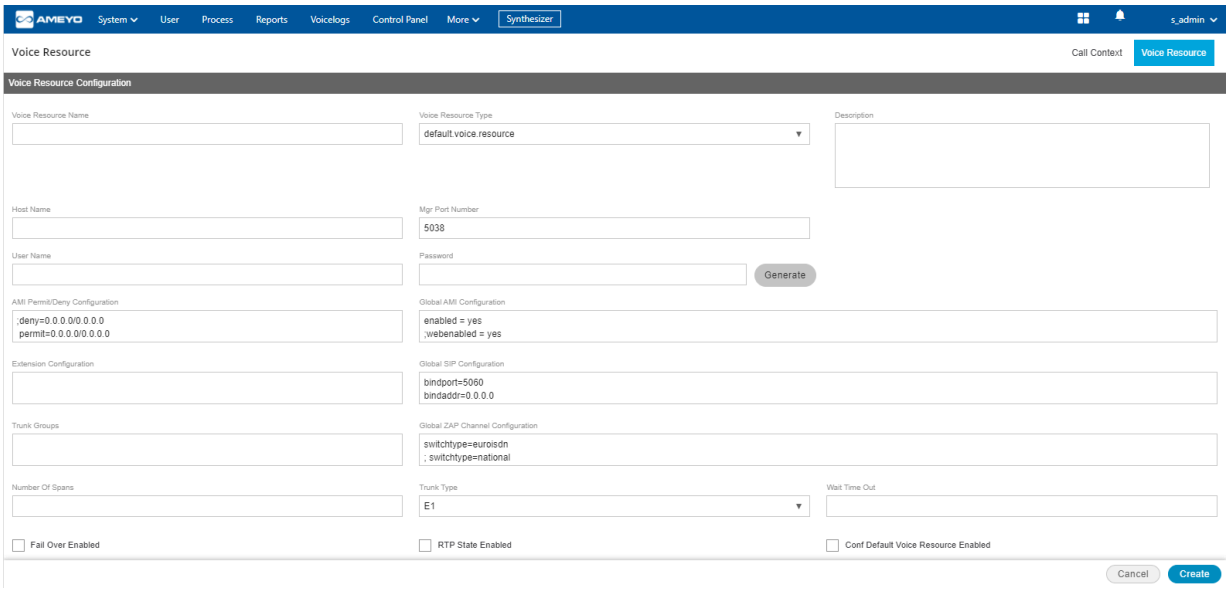


Figure: Adding a Voice Resource

On the displayed screen provide the following information.

2. **Voice Resource Name:** Provide the name of the voice resource.
3. **Voice Resource Type:** Select the type of the voice resource from the drop-down list.
4. **Host Name:** Provide the IP address or the domain name of your call server location.

5. **My Port Number:** Provide the PORT number at which your call server is configured to word upon.
6. **User Name:** Provide the user name of your voice resource through which you want to register your voice resource.
7. **Password:** Provide the password of your voice resource. Click "Generate" button to generate the provided password to your voice resource.
8. **AMI Permit/Deny Configuration:** Provide the AMI Permission settings of your voice resource.
9. **Global AMI Configuration:** Provide the global AMI Configuration of your voice resource. The default configuration is already provided here which you can configure according to your usecase.
10. **Extension Configuration:** Provide your extension configuration.
11. **Global SIP Configuration:** Provide the global SIP Configuration of your voice resource. The default configuration is already provided here which you can configure according to your usecase.
12. **Trunk Groups:** Provide the trunk groups for your voice resource.
13. **Global ZAP Channel Configuration:** Provide your ZAP channel configuration for the PRI you have used.
14. **Number of Spans:** Provide the total number of spans.
15. **Trunk Type:** Select the type of the trunk from the drop-down list.
16. **Wait Time Out:** Provide the time in seconds for which a call will wait before timed out session.
17. **Fall Over Enabled:** Check the box if you want to enable the Fall Over Configuration for your voice resource.
18. **RTP State Enabled:** If you want to enable the RTP state, then enable the check box.
19. **Conf Default Voice Resource Enabled:** Enable the checkbox to enable default Voice resource configuration.
20. Click "Create" button to create the voice resource.

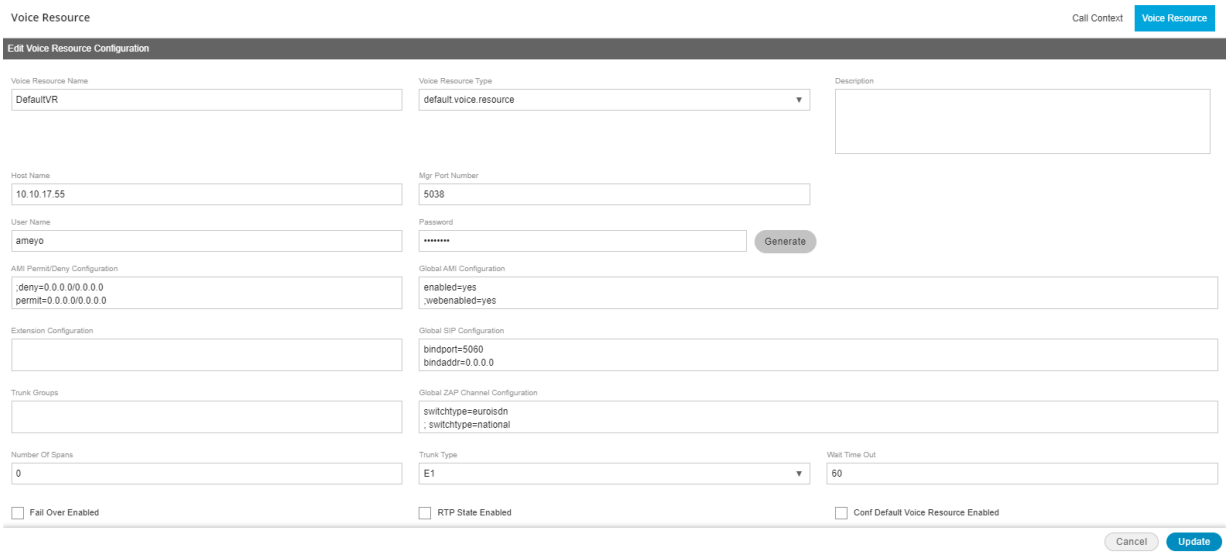


Figure: Sample Voice Resource

Voice Resource Activation Status

Once the voice resource is created, then the voice resource will be registered at the call server. If it is registered successfully, then the status will turn to "Success"; else it will show the status as "Failure" on the main Voice Resource screen.



Figure: Voice Resource Registration Status

Edit a Voice Resource

Select a voice resource which you want to edit and click "Edit" button. The same page will display which had been displayed while creating the new voice resource.

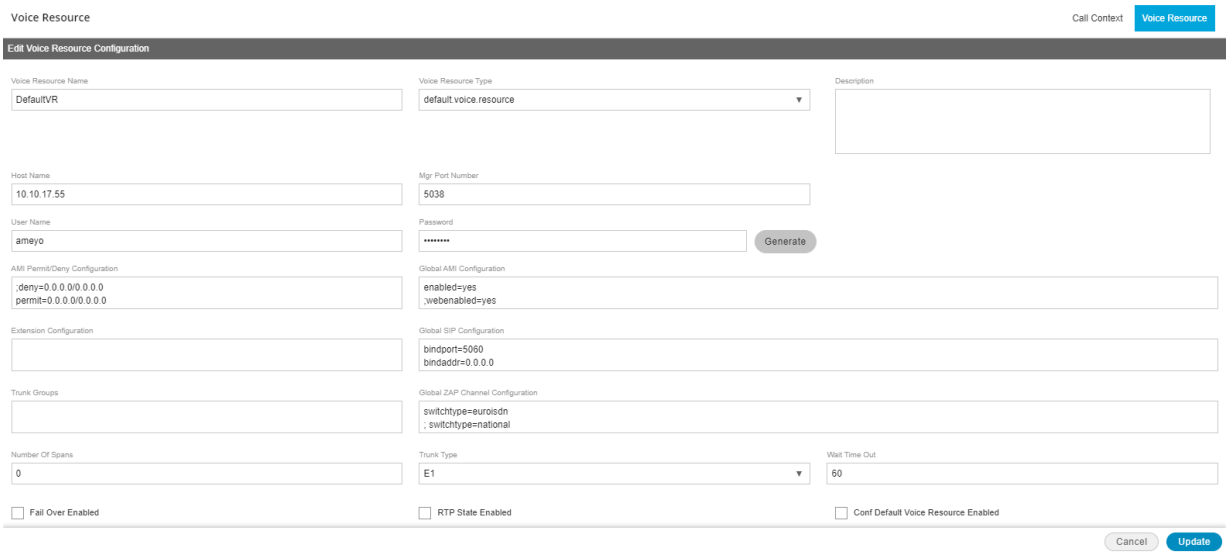


Figure: Edit Voice Resource

Delete the Voice Resource

Select a voice resource which you want to delete and click "Delete" button. A confirmation modal is displayed.

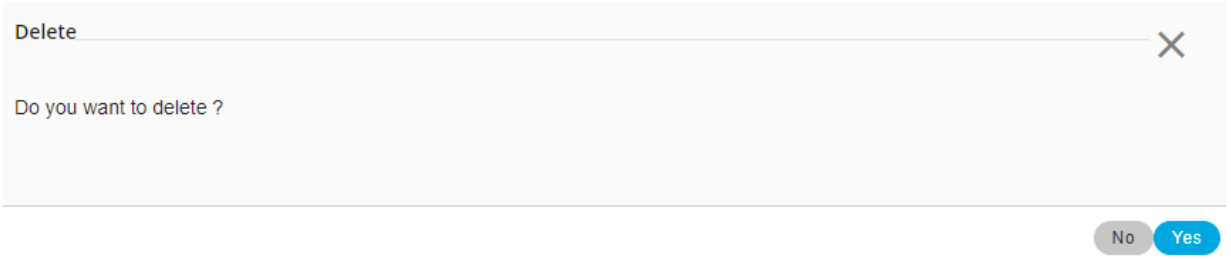


Figure: Delete Voice Resource

Click "Yes" to delete the voice resource; else click "No"

> Once the voice resource is deleted from the system, then there is no way to get the deleted voice resource back. It will be deleted permanently.

19.1.10. Settings of All Campaigns

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

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

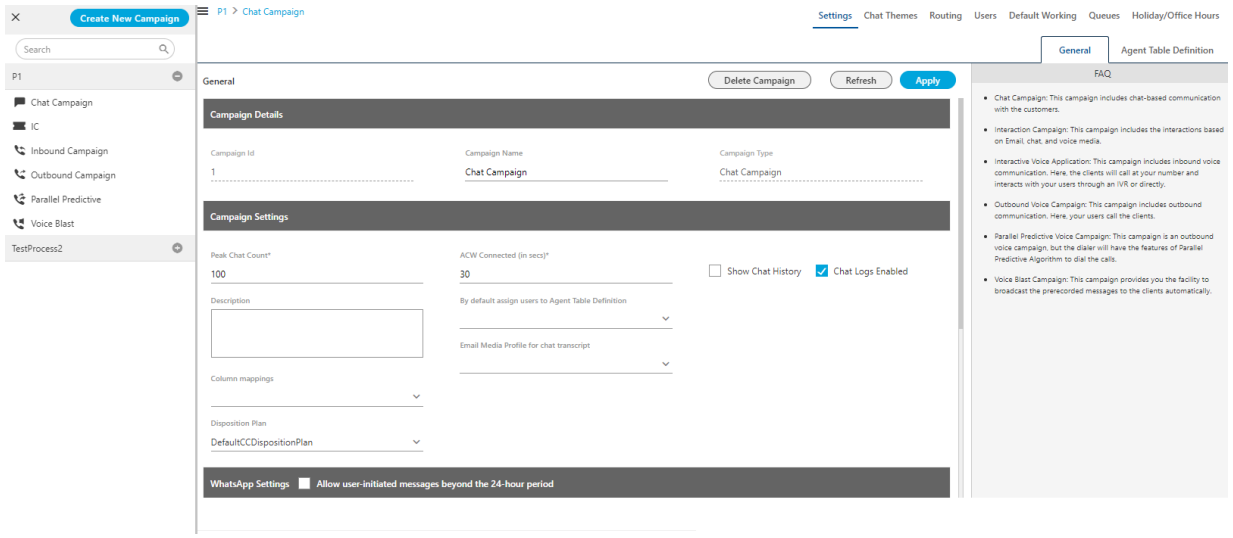


Figure: Settings for All Campaigns

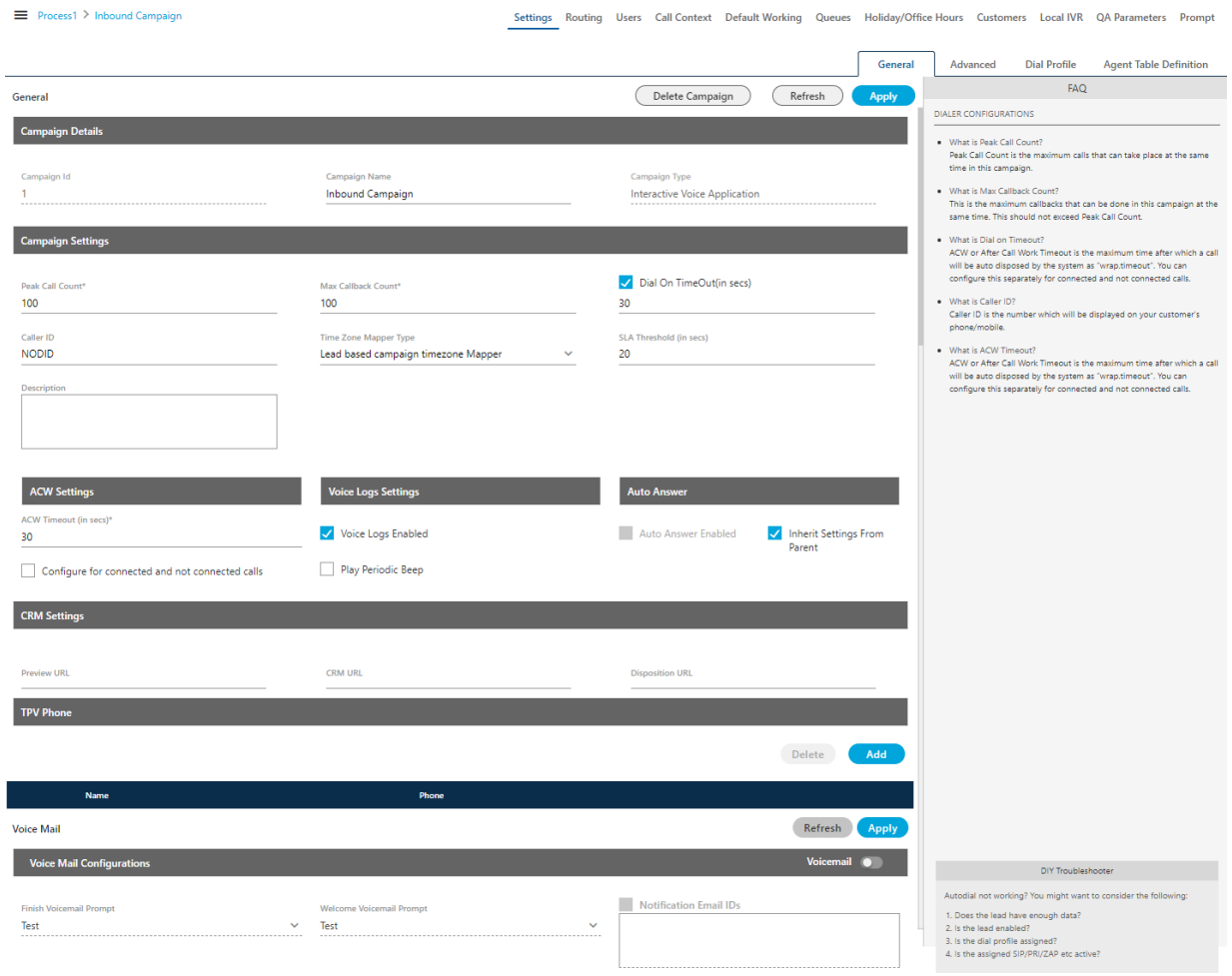
Click the following links to know about the interface of this tab for each campaign type.

1. **Chat Campaign Settings**
2. **Interaction Campaign Settings**
3. **Interactive Voice Application Campaign Settings**
4. **Outbound Voice Campaign Settings**
5. **Parallel Predictive Voice Campaign Settings**
6. **Voice Blast Campaign Settings**

19.1.10.1. Interactive Voice Application Campaign Settings

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

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



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

It contains the following tabs.

- Settings
    - General Settings
    - Advanced Settings
    - Dial Profile Settings
    - Agent Table Definition
- Queues
- Routing
- Users
- Default Working
- Holiday/Office Hours
- Call Context
- Local IVR
- QA Parameters
- Prompt

Settings Tab

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

General Settings

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

Campaign Details

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

Campaign Settings

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

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

- **SLA Threshold (In Sec):** Here, you can specify the threshold in which the inbound calls should be answered ideally.
- **CRM Settings:** These are the same settings, which you have provided while creating this campaign. You can modify all of its fields here.
- **Auto Answer Settings:** Auto-Answer Feature is already available for WebRTC with or without Ameyo SIP Agent Proxy. This feature did not require the implementation of "Accept-Reject" node in the Nodeflow to show the prompt at Ameyo User Console before answering the call.However, "Accept-Reject Node" was providing the Auto-Answer Configuration at the campaign-level and this feature was missing in Auto-Answer Feature for WebRTC."Auto-Answer" section contains the following options and only one option will work at a time.
    1. **Inherit from Parent**: Select this option to inherit the Auto-Answer Configuration in the campaign from the System-level. If the Auto-Answer is disabled at the System-level, then it will remain disabled at the Campaign-level. If the Auto-Answer is enabled at the System-level, then it will remain enabled at the Campaign-level.
    2. **Auto Answer Enabled**: It will enable "Auto-Answer" at the Campaign-level forcefully even if it is disabled at the system-level. Refer to the following screenshot.



Figure: Auto-Answer Enabled

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



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

- **Voicemail Configuration:** Perform the following steps to enable the voicemail feature on the queue level. If this is not enabled, then voicemails will not be recorded.

> Make sure to upload the Prompts through "Prompts" tab in the campaign to use them in Voicemail.

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

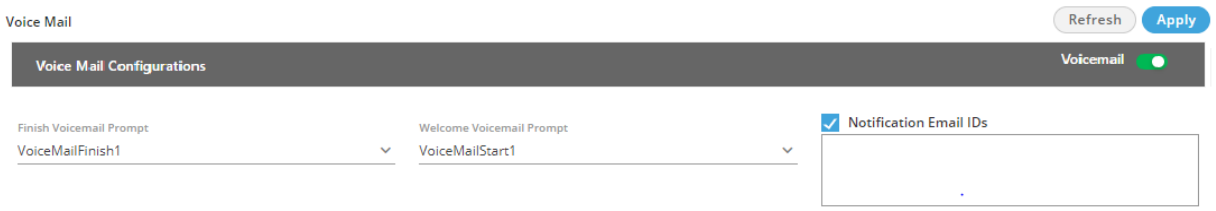


Figure: Voicemail Configuration

  - **Notifications Email IDs:** Check "Notification Email IDs" to send the voicemail notifications to the selected recipients. After enabling it, enter the email addresses (only Gmail domain) of the recipient's Administrator separated by comma. For example: email1@gmail.com, email2@gmail.com.

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

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

Advanced Settings:

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

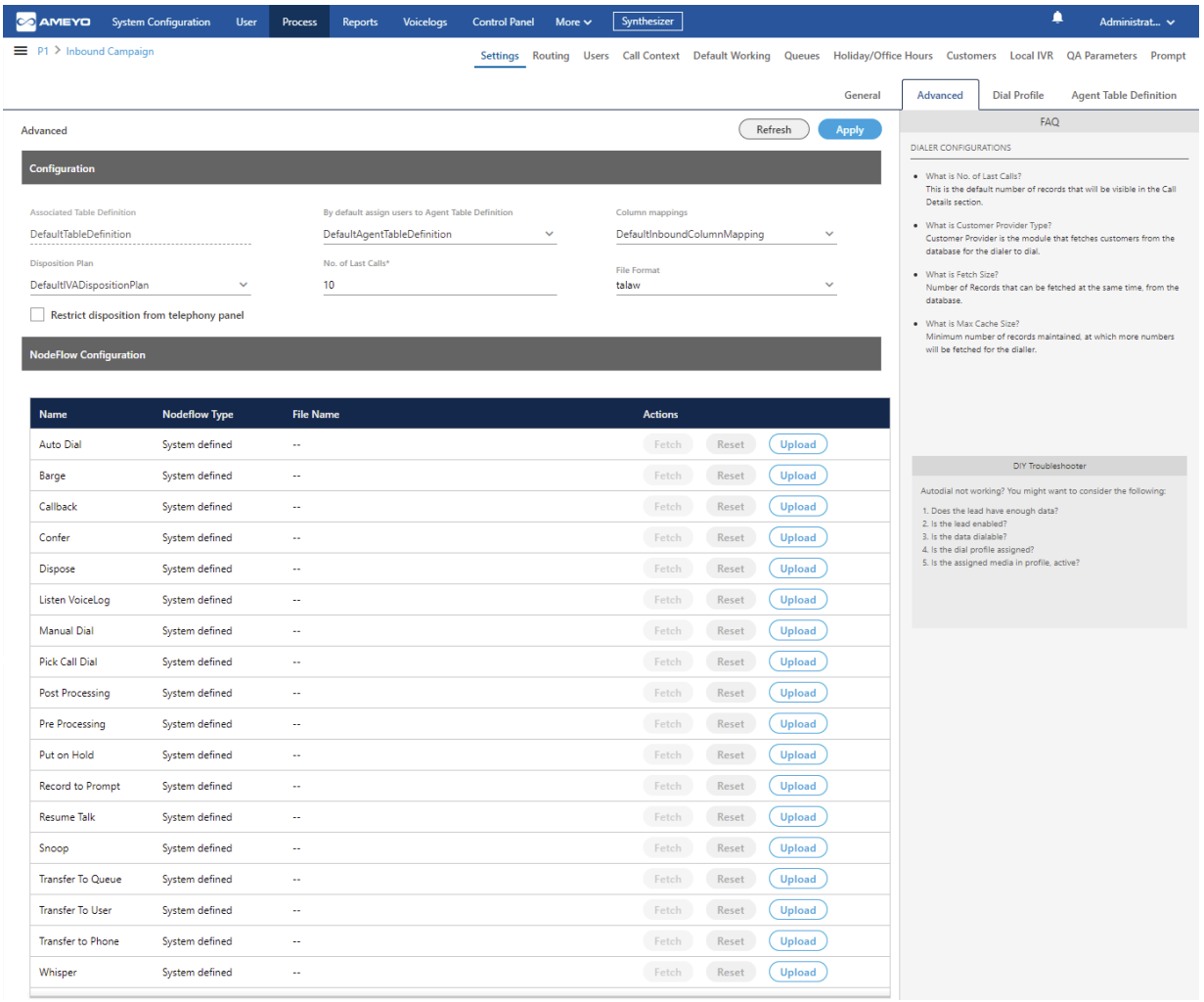


Figure: Advanced Settings

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

Configuration

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

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

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

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

Restrict Disposition from Telephony Panel

In the Contact Center Industry, the business prefers to dispose of the Calls from the CRM, especially which is linked with Ameyo Application Server. The agents have two different ways to dispose of the single call - one through Telephony Panel and another through CRM. If the agent was disposing of the calls in both of the ways, then there will be two dispositions for a single call that can create confusion and discrepancy.To avoid this discrepancy, a configuration named "Restrict disposition from Telephony Panel" is added in "Advanced" Tab of Voice Campaign Settings.

Brief about Settings

- **Uncheck (Default):** Uncheck this option to use the default or existing Call Disposition process. It means the agent can dispose of the call from both Telephony Panel and CRM.
- **Check:** Check this option to disable the call disposition at Telephony Panel and allow the agents to dispose of the call from CRM only.

By default, this option is unchecked due to which the agent will be able to dispose of the call from the Telephony Panel. However, if the Administrator has enabled it, then the agent will not be able to dispose of the call from the telephony panel.

> We recommend that this option should be checked if the client is not using any CRM.

1. **When Unchecked → Disabled (By Default)**If the option “Restrict Disposition from Telephony Panel” is unchecked, then the default or previous Call Disposition flow will work by default. The Agent can dispose of the call from Telephony Panel or CRM. However, it will not solve the use case addressed in this story.
2. **When Checked → Enabled**The Administrator can check this option to restrict the disposition of calls in the Telephony Panel. The call cannot be disposed of from Telephony panel. The call has to be disposed of from the CRM only. As soon as the call is

ended, the telephony panel will not slide out to the left side from the right bar. An error is displayed in the tooltip when the agent tries to dispose of the call from the telephony panel.

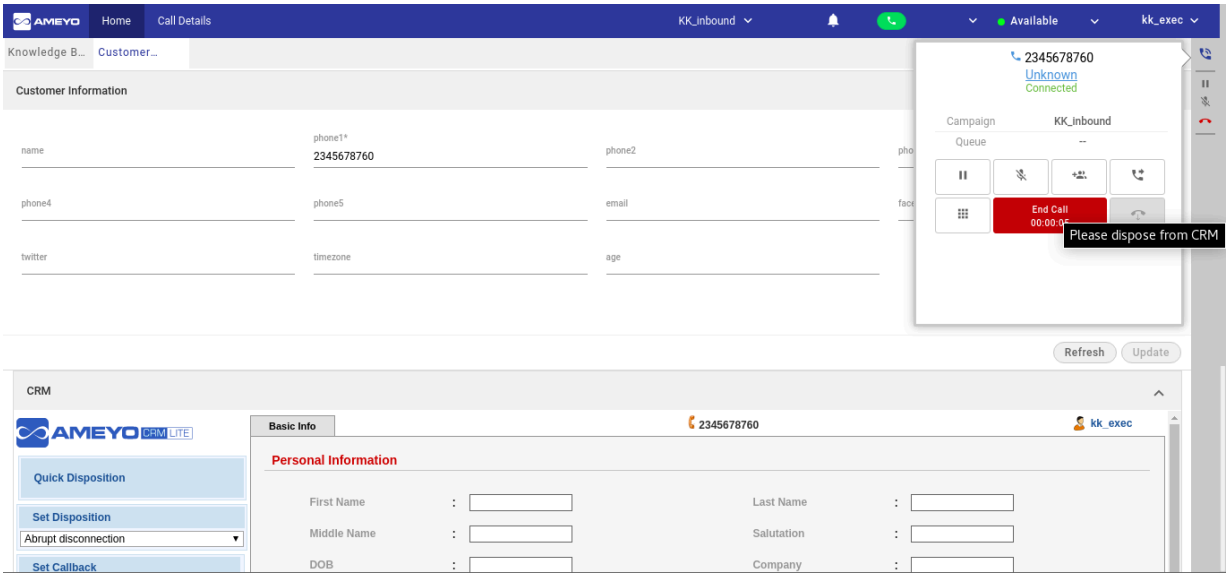


Figure: Disposition of Call is disabled in Telephony Panel

"ACW Timer" is displayed in the tooltip of the phone icon in the right panel after the call disconnection (since the telephony panel is not shown to the agent). When the agent disposes of the call from the CRM, then an inline message is displayed on the page.

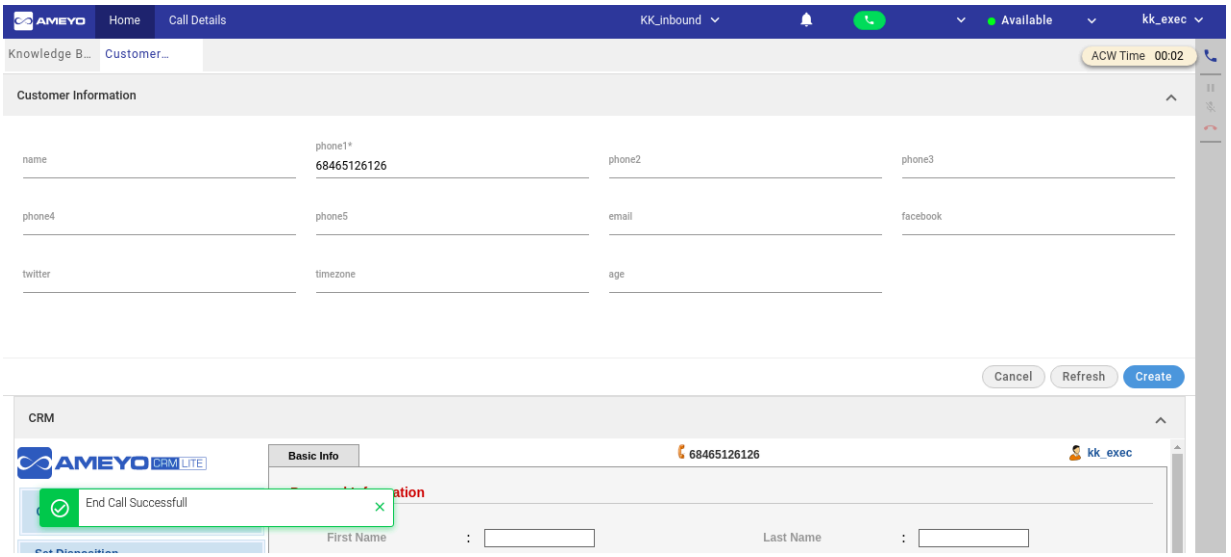


Figure: Disposed of the Call from CRM

Other Impacts if enabled

Dispose and Dial will also be performed through CRM. A REST API is also provided to perform the same.Callback and call notes are understood in the normal disposition operation through the telephony panel only. If the call disposition is disabled from the telephony panel, then API is provided to handle the same while disposing of the call through CRM.

Nodeflow Configuration

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

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

Dial Profile Settings:

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

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

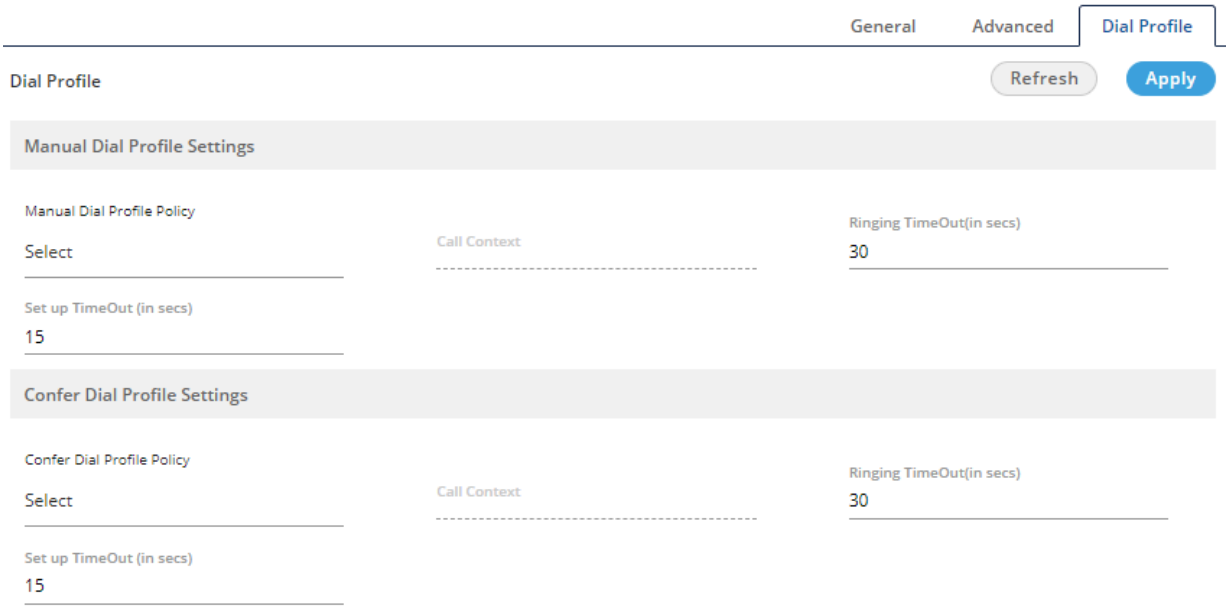


Figure: Dial Profile Settings

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

3. **Setup Timeout (in secs.):** It is the time required from the initiation of a call till the connection gets established, after which call gets disconnected if the call is not connected. Provide a value in seconds for the same. The default value is 15 seconds

3. Click "Apply" to apply the dial profile for any section.
   Rather, you can click "Refresh" to discard the changes.

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

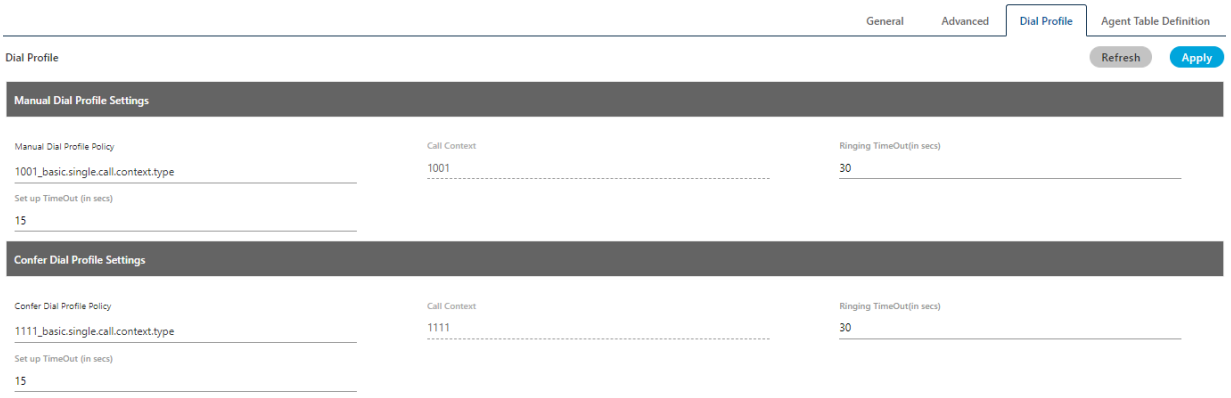


Figure: Configured Dial Profile Settings

- **Agent Table Definition:**

This tab allows you to select the default Agent Table Definition for the campaign and assign the users to the selected Agent Table Definition.

- **Users**

Here, you can assign and unassign the users to this campaign.

- **Queues**

Here, you can create and manage the queues.

- **Default Working**

Here, you can select the users who will be logged in to this campaign, by default, and will not receive the prompt to select the campaign.

- **Customers**

Here, the administrator can you can apply the Filter or Filter Groups for the campaign. This tab has been explained in "Outbound Campaign Settings".

- **Holiday/Office Timings (Licensed Feature)**

Here, you can define the holidays, office hours, and non-working hours for this campaign. This tab has already been explained in "System Configuration".

19.1.10.1.1. Call Context

Refer to the following **link** for Call Context Tab details

19.1.10.1.2. Queue Management in Voice Campaign

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

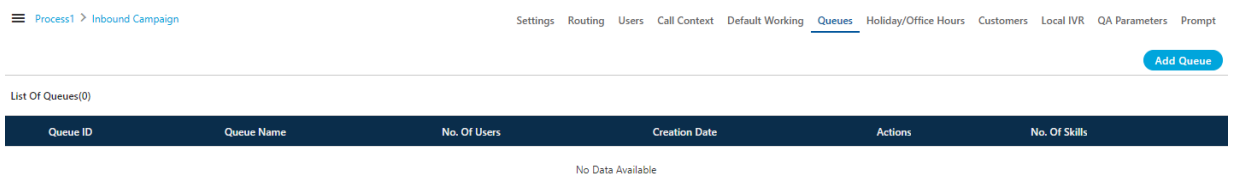


Figure: Queues Tab

Create Queue

Perform the following steps to create a queue.

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

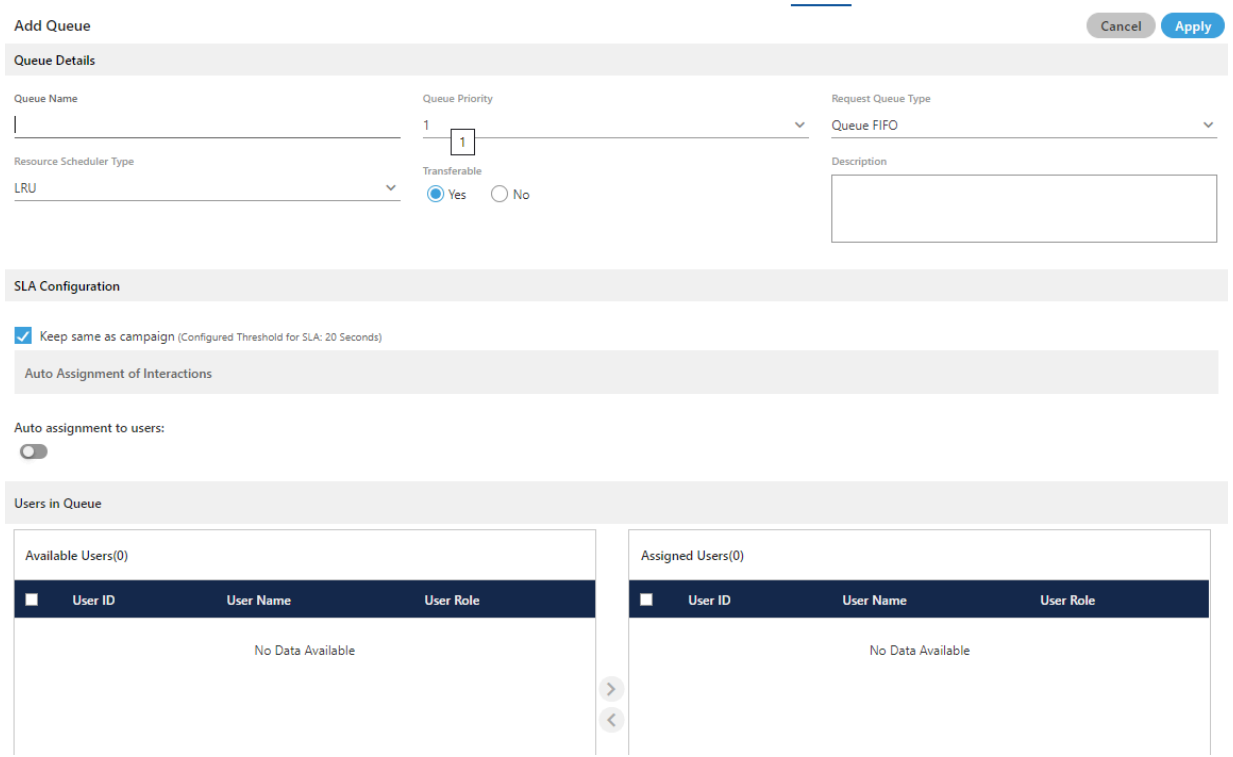


Figure: Create Queue

2. Provide a name for the queue.

3. Select a value for the queue priority. This value will be used for "Priority" type queues.
4. **Request Queue Type:** It lets you define which customer will be served first if more than one customers are waiting in the queue.
    1. **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.
    2. **Queue Priority:** Nodeflow can be used to decide the priority of any customer. Queue with "1" priority will be selected first. Similarly, Queue with "2" priority will be selected at the second place.

       Example:

       Question: If customer1 (who reached earlier) is waiting in Queue1 having priority 1 and customer2 (who reached late) is waiting in the Queue2 having priority 2, and if only one agent is serving both queues, then what will happen?
5. **Resource Scheduler Type (Licensable):** It will let you decide which agent would be connected to the customer when two agents are available to take the chat or call. Select any of the following options.
    1. **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.
    2. **Multiple Extension (Licensable):** Select it if the agents have multiple extensions and they are supposed to attend multiple communications (chat or call) simultaneously. One agent can be connected to two customers in the same queue.
    3. **Multimedia Based:** Select it only if the agents have to take chat and Inbound calls simultaneously.
    4. **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.
The user assignment is atomic in nature, that is not transactional. If some users out of all selected users could not be assigned because of any reason such as configuration, then allowed users will be assigned except those are failed to be assigned.
In the case of license restriction, the users of which license is not obtained will not be displayed in the section of available users.

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

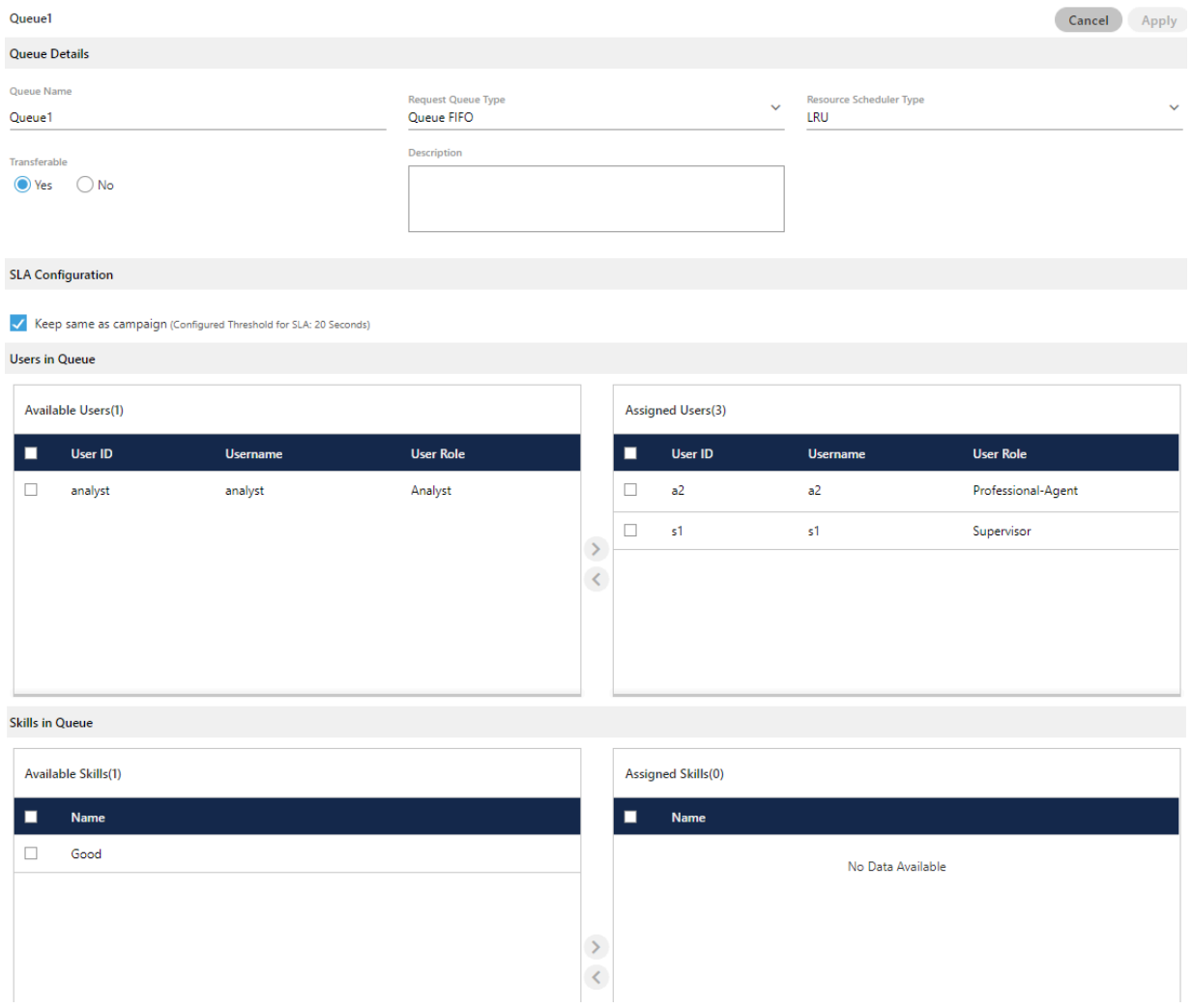


Figure: Sample Details to create a Queue

10. Click "Apply" to create the queue.
    Rather, you can click "Cancel" to discard the changes.

You can create multiple queues using these steps.

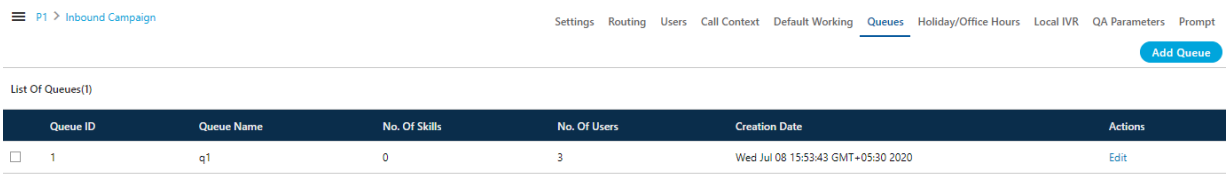


Figure: List of Queues

Edit Queue

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

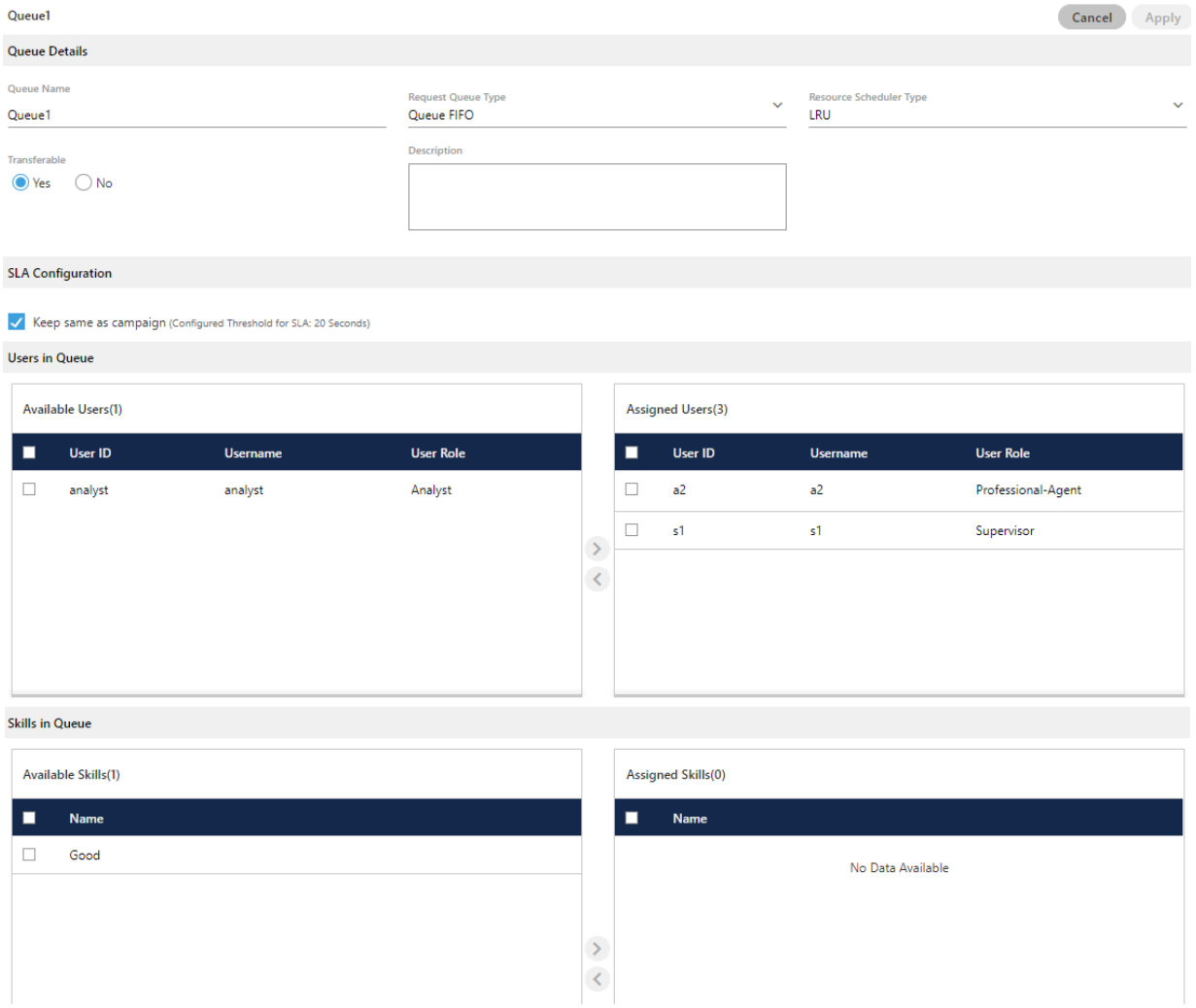


Figure: Edit the Queue

Delete Queue

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



Figure: Delete Queue

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

19.1.10.1.3. Local IVR in a Campaign (Licensable)

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

Examples

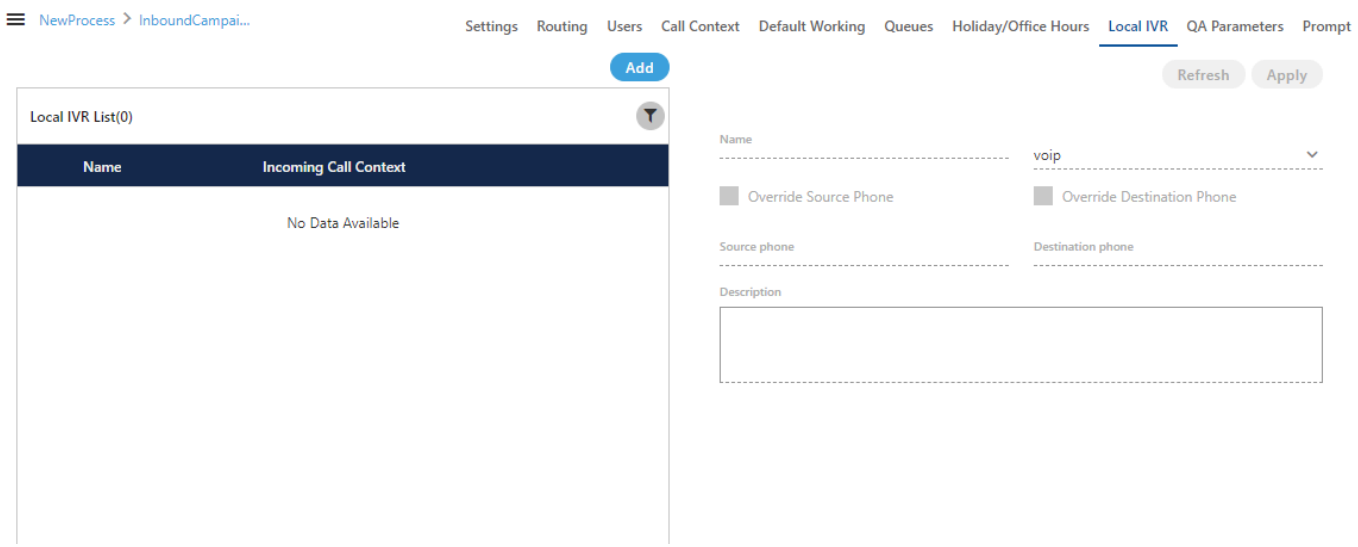
- If you take an example of a customer calling to book a travel ticket or a customer calling to bank, then the customer is welcomed by the main IVR of a Nested IVR. When the customer press any option on the main IVR, a new IVR (that is a branch of main IVR) is presented.
- Sometimes the Agent confer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

Business Use Case

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

Local IVR Tab in Voice Campaign Settings

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



Add a Local IVR

Perform the following steps to add a Local IVR.

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

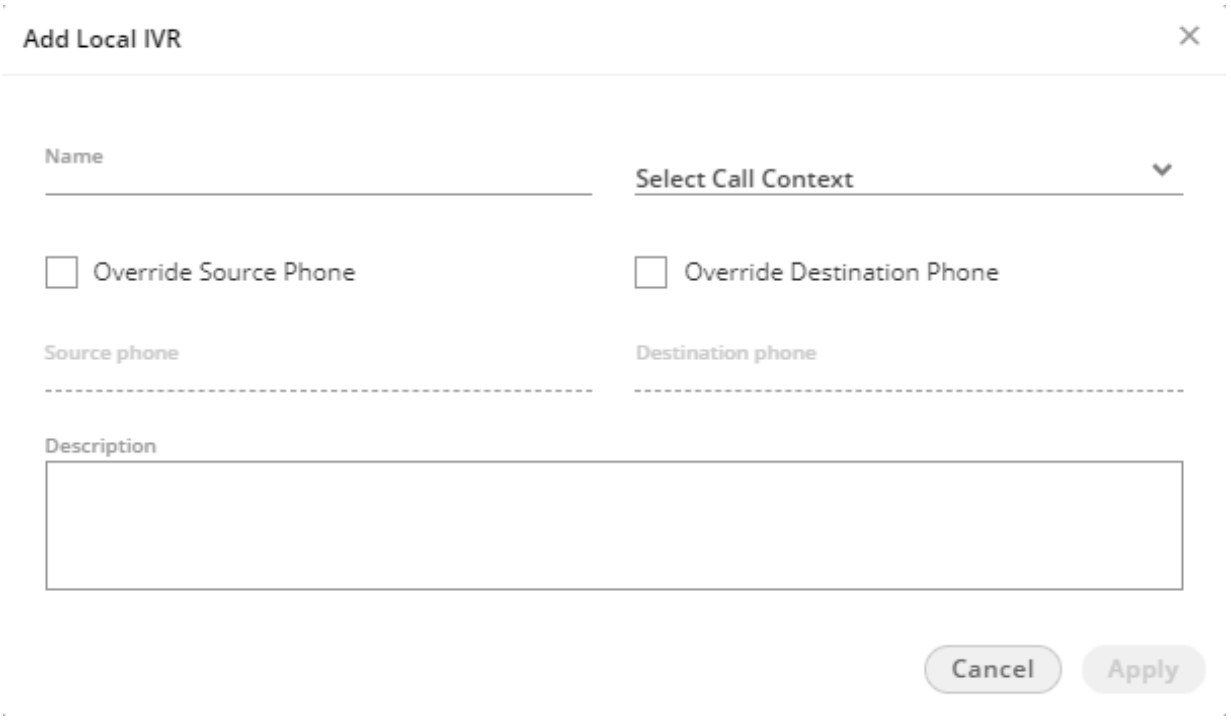


Figure: Add a Local IVR

2. Provide a name for the new IVR.
3. "Call Context" drop-down menu lists all Call Contexts that you have assigned to this campaign. Select anyone of them.

4. Select "Override Source Phone" option to override the source number (from which a call is being received) of the incoming call with the provided number. After checking it, provide a number in its relevant textbox.
5. Select "Override Destination Phone" option to override the destination number (to which a call is being dialled) of the outbound call with the provided number. After checking it, provide a number in its relevant textbox.
6. Provide a description in "Description" text box.

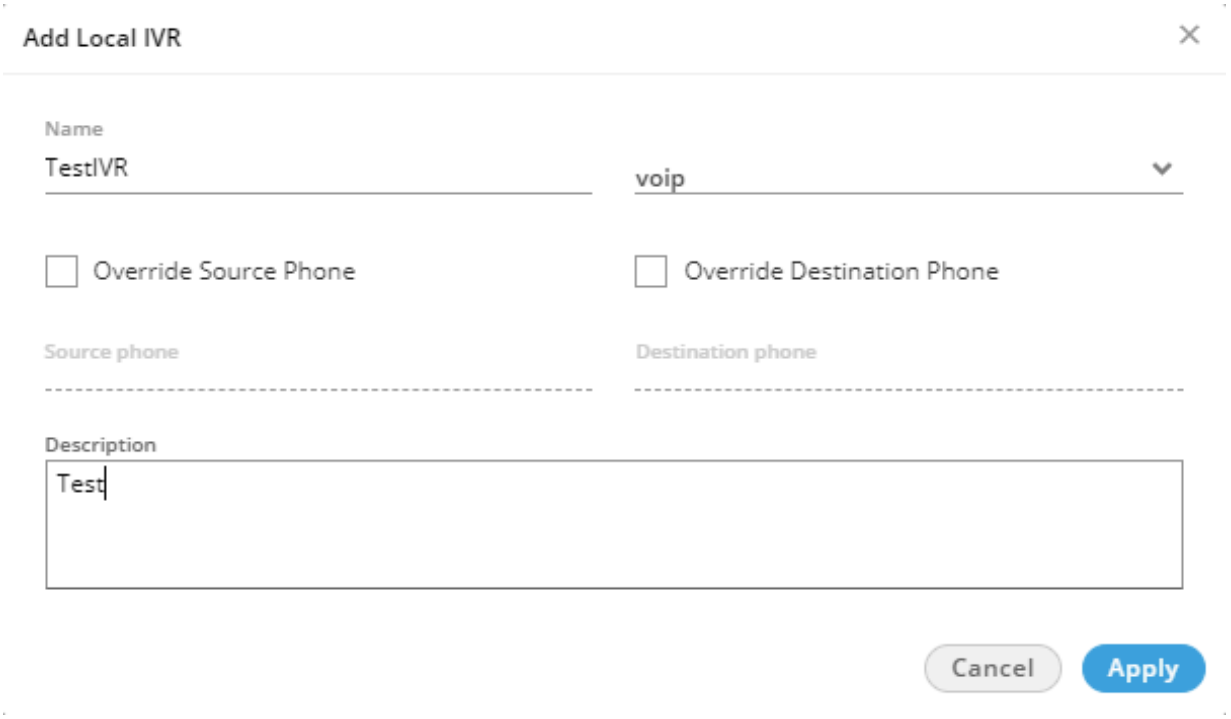


Figure: Sample Details

7. Click "Apply" to create the local IVR using the selected call context.
   Rather you can click "Cancel" to not create it

You can follow these steps to create multiple Local IVRs.

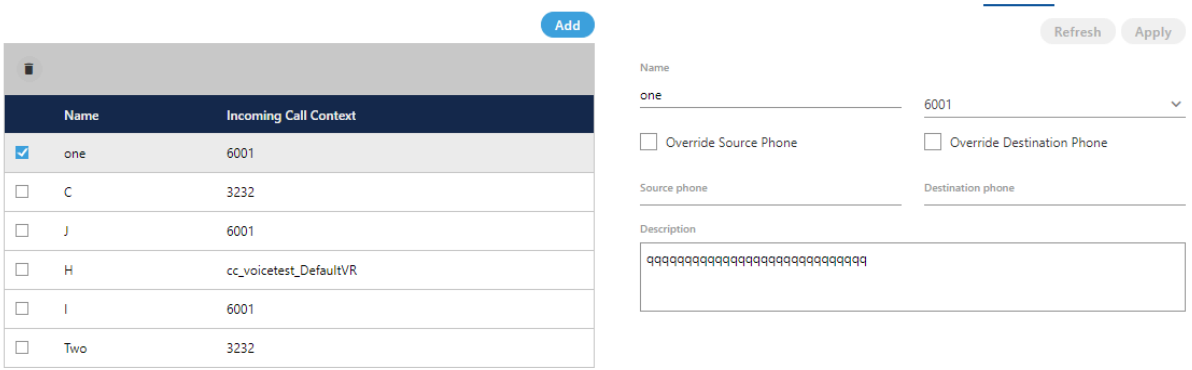


Figure: Local IVRs

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

Scenario 1: System-level Call Routing for IVR

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

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

Refer to "**System Call Routing**" page to know about the steps to create a Call Routing Plan.

Scenario 2: Campaign-level Call Routing for IVR

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

Refer to "**Call Routing**" page to know the steps to create a Call Routing in the Campaign Settings.

How Call Routing works with Local IVR?

Call Routing means that a call is being moved from an endpoint to another. The decisions in the Call Routing can be made using many reasons sucha as Caller Identification, Dialed Number, Time of Day, and Custom Defined Parameters established in an IVR (Interactive Voice Response) program script.

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

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

Important Point

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

Known Issues related to Local IVR in Exotel

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

Modifying an IVR

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

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

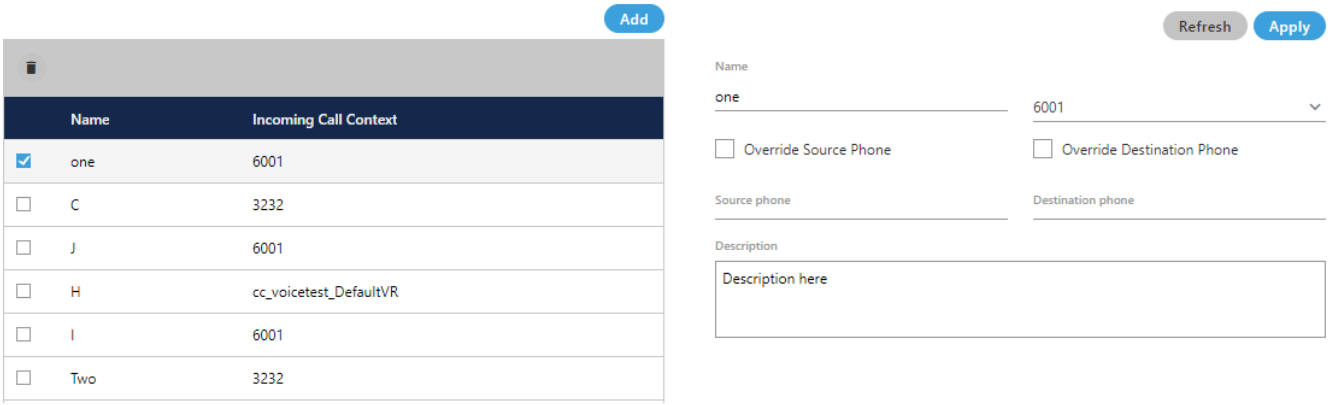


Figure: Sample Details

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

- Name
- Call Context
- Enable or disable the option to override the Source Phone
- Already provided Source Phone Number
- Enable or disable the option to override the Destination Phone
- Already provided Destination Phone Number
- Description

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

3. Validate the changes carefully as the Call Routing can be disabled for this Local IVR if any change is made to Call Context, Source Phone, or Destination Phone.
4. Click "Apply" to apply the changes.Rather, you can click "Cancel" to discard the changes.

Delete an existing Local IVR

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

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

Perform the following steps to delete a Local IVR.

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

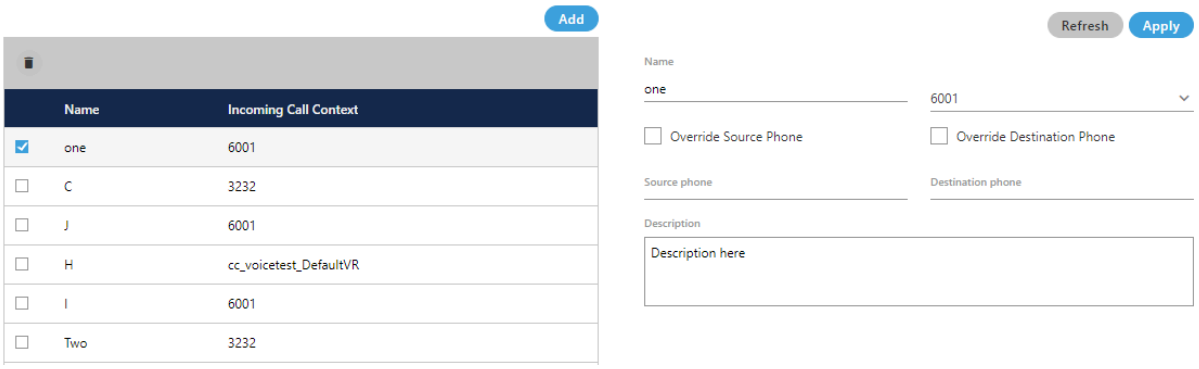


Figure: Sample Details

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

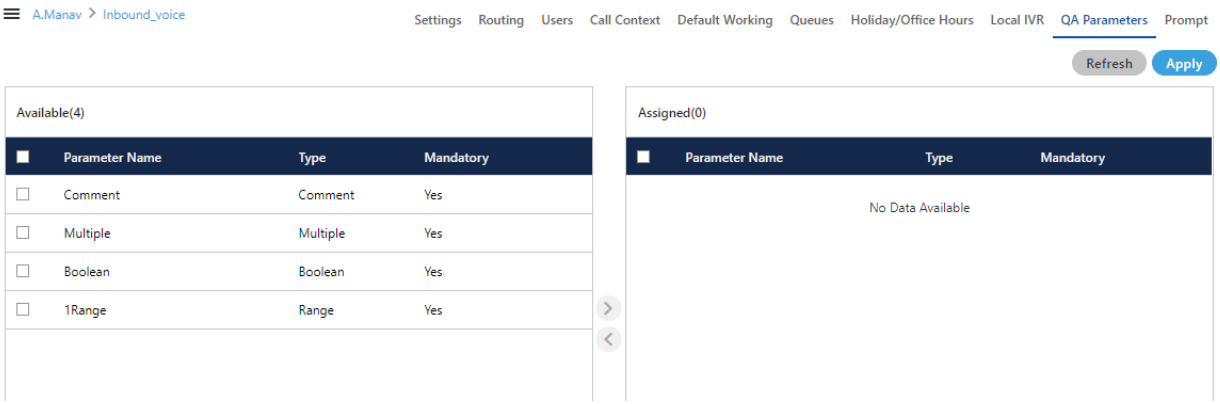


Figure: Warning before deleting an IVR

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

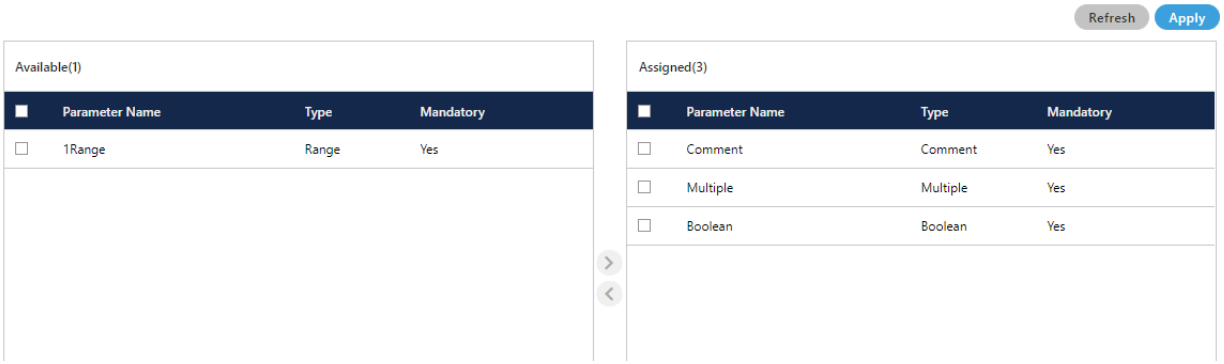
19.1.10.1.4. QA Parameters in a Campaign

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



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

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

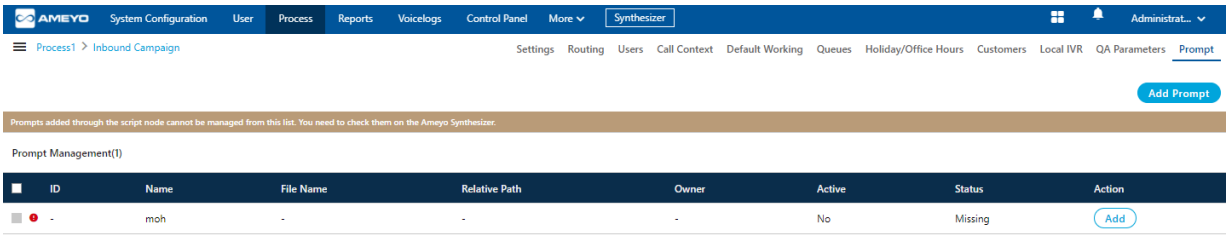


3. Click "Apply" to assign the QA Parameters to this campaign.
   Rather, you can click "Refresh" to not assign the selected parameters.

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

19.1.10.1.5. Prompts in a Campaign

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



Add a Prompt

Perform the following steps to create a Prompt.

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

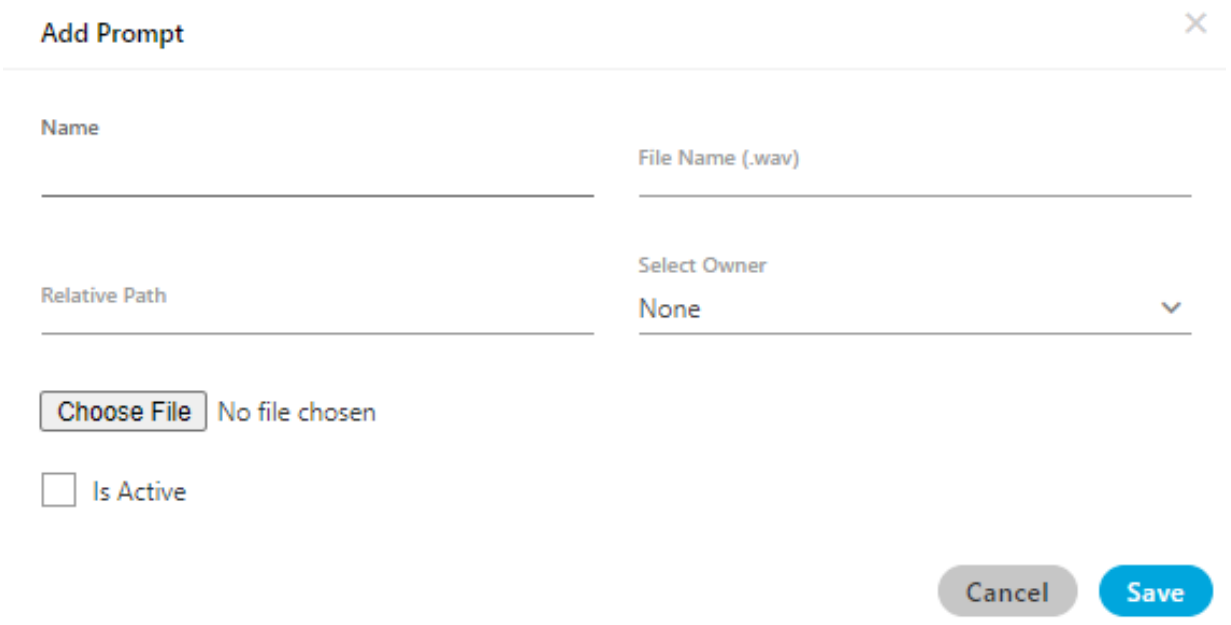


Figure: Add a Prompt

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

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



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.

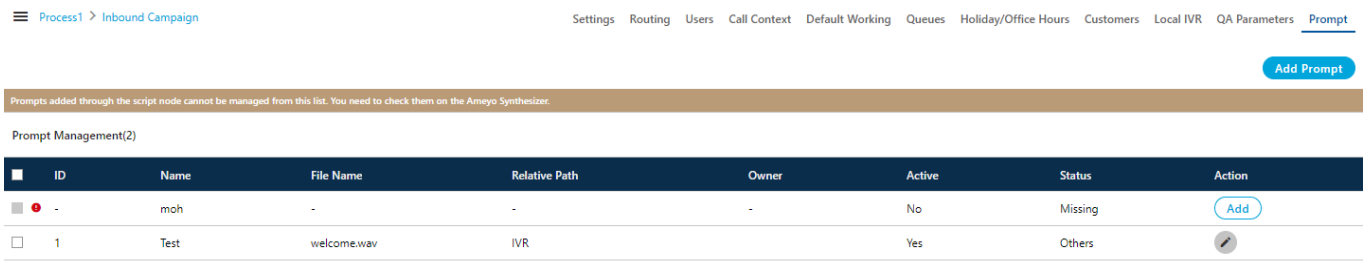


Figure: Added Prompts

Compatibility List

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

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

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

Edit Prompt

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

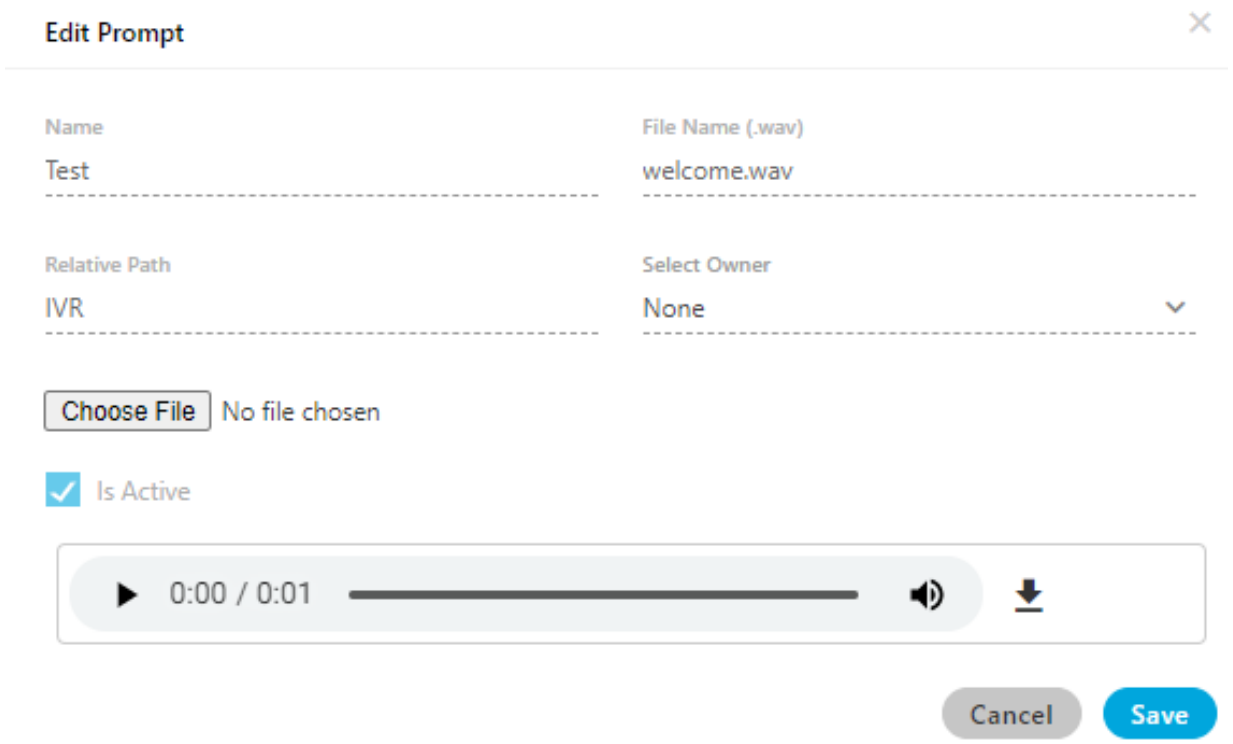


Figure: Edit a Prompt

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

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

Identification of Missing Prompts

Whenever a customer calls a business, every voice message that is played is known as prompts. But there are some prompts whose voice message file is not present. Such prompts are called missing prompts. These prompts are shown to the user on UI, but they are not useful as their prompt is not uploaded. Thus to identify such prompts, missing prompt icon and status has been introduced in Ameyo.

On the Prompts tab of Administrator and Supervisor, a new status column has been introduced. This column's values show whether the prompt is in use or missing, as shown in the following screenshot.

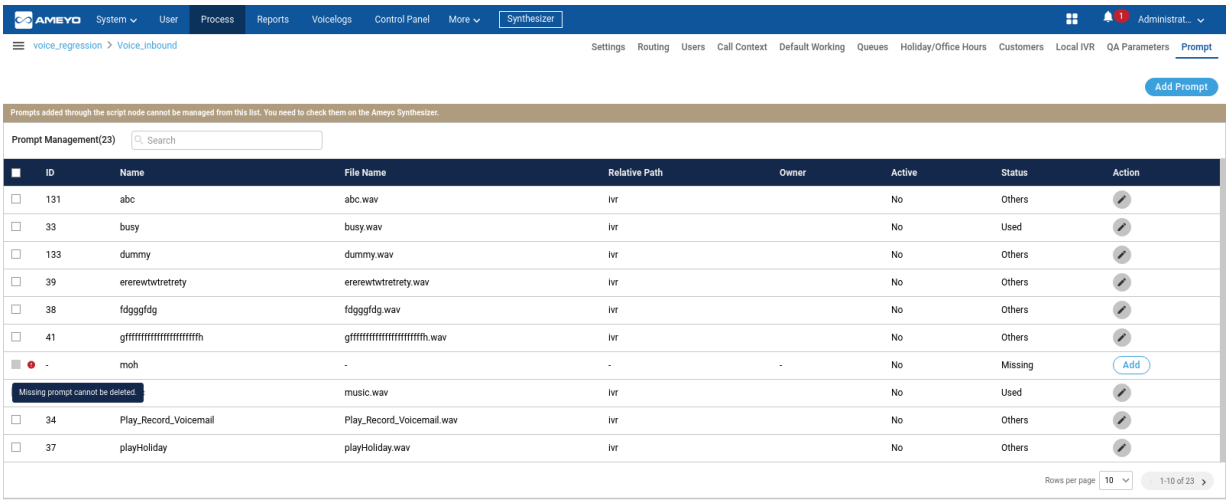


Figure: New Interface of Prompt Tab

A new status column is introduced, which shows the status of the prompt. The following three status have been used to monitor the prompts:

1. **Used:** It means that the prompt is in use.
2. **Unused:** It means that the prompt is not in use.
3. **Missing:** It means that the prompt voice file is missing, but the prompt is being created.

A visual red dot indentation is present at the front of the missing prompts. The user can also hover over this icon to view the information about the missing prompts.

Non-editable Prompt Name

A modal is shown when the user click "ADD" button present in front of the missing prompt. The name textfield of this modal is non-editable, which means that the user is not able to edit the name of the prompt.

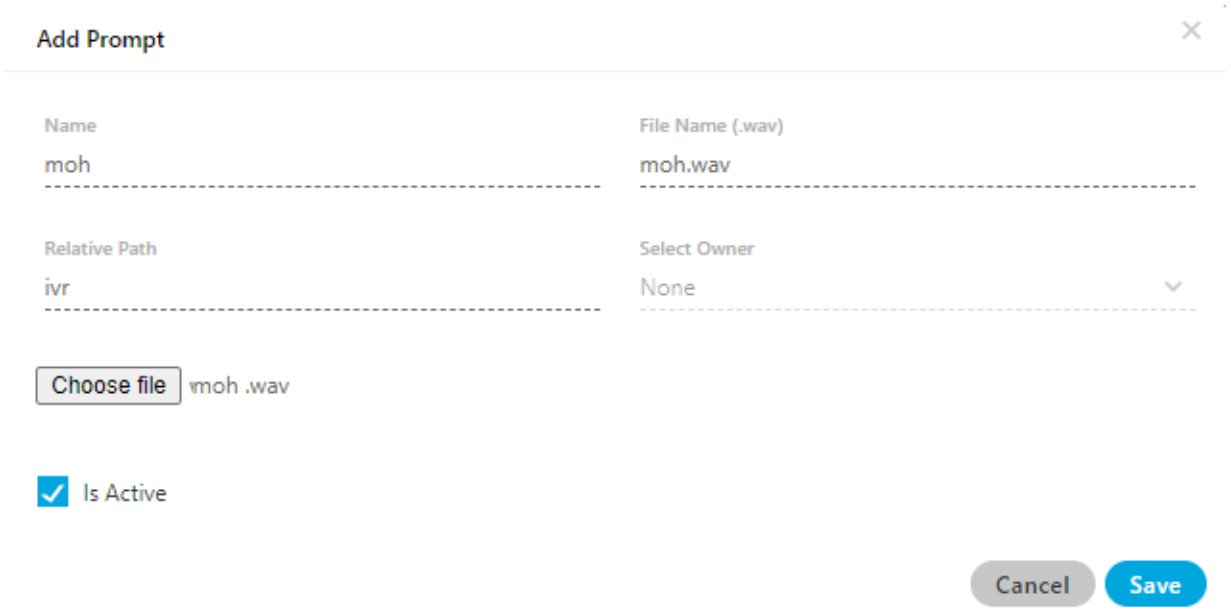


Figure: Non-editable textfield of Prompt Name

Notification for Uploading a Prompt file

If the supervisor uploads the nodeflows to the missing prompt files, then a notification will be sent to the administrator and supervisor at the same time. The following types of notifications will be sent to the administrator and supervisor for uploading the nodeflow file.

1. A toast and bell notification is sent to the administrator.
2. The supervisor has received a bell notification.

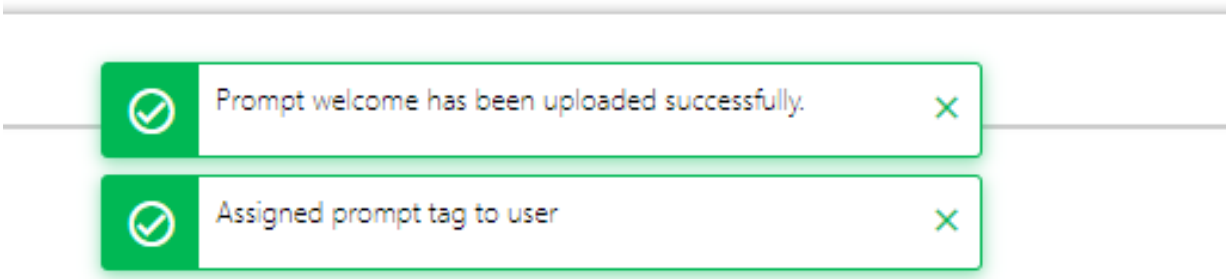


Figure: Toast notification at Administrator UI

The notification shows the campaign and prompt name in which the nodeflow has been uploaded. The administrator will be redirected to the prompts tab after clicking the notification.

> After the creation of the missing prompt, the missing prompt's status will be changed to used/unused accordingly.

The notification will only be sent to the Group Manager and Analyst user roles. They are not able to update or click it.

> Missing Prompts are as such not an entity, thus there is no option to delete them.

19.1.10.1.6. Routing in a Voice Campaign

Routing in a Voice Campaign

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

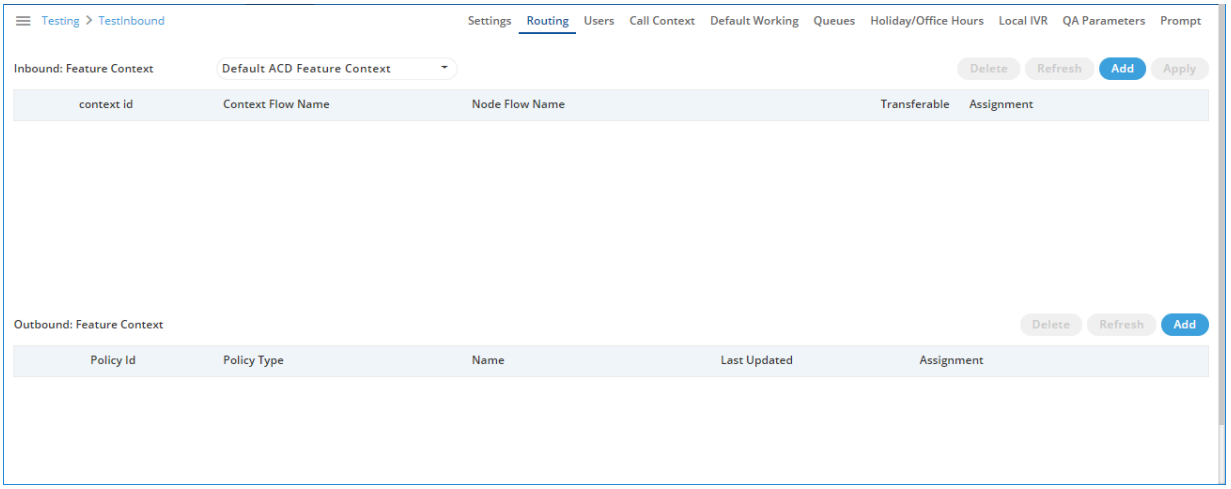


Figure: Routing

Routing for Inbound

Add a Nodeflow for Routing

Perform the following steps to create a nodeflow.

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

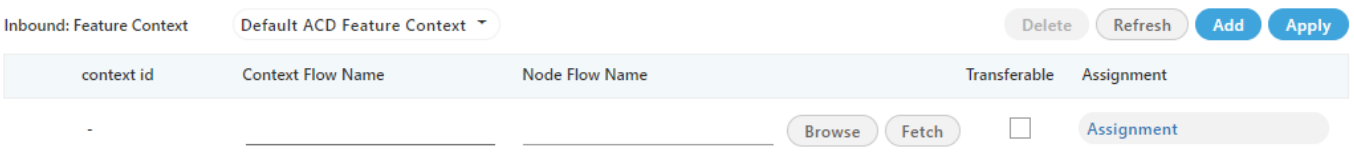


Figure: Add Context Flow

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

> Service Engineer will provide you the required nodeflow files.

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

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

Assign Nodeflow to a Queue

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

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

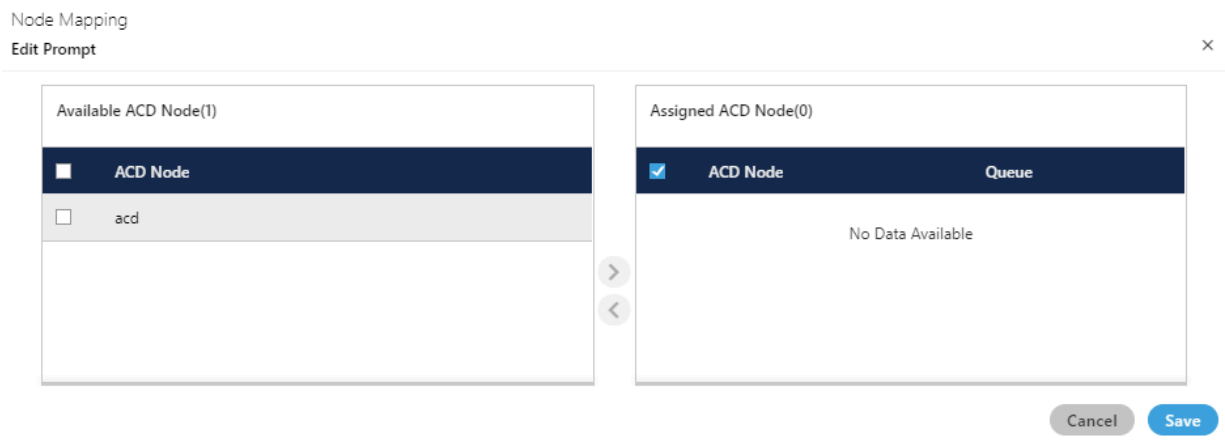


Figure: Assign Nodeflow to a Queue

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

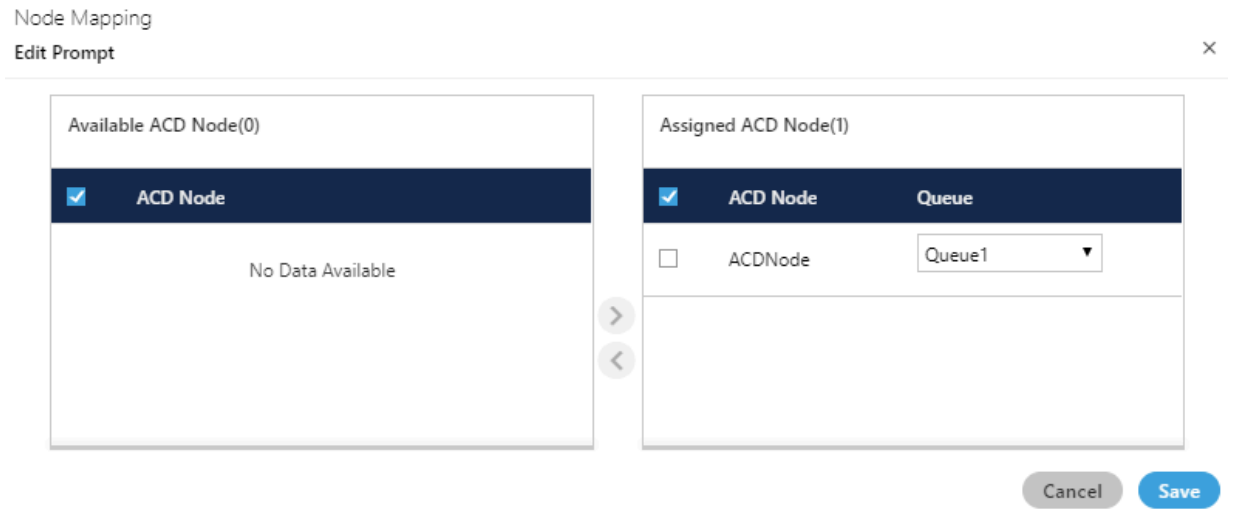


Figure: Assign Queue in ACDNode

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

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

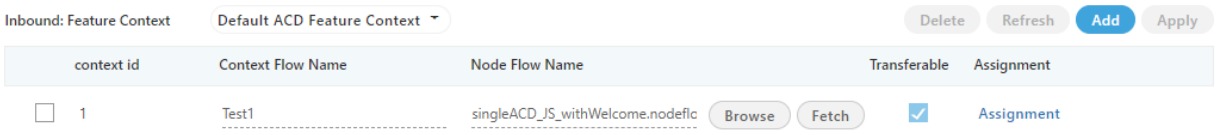
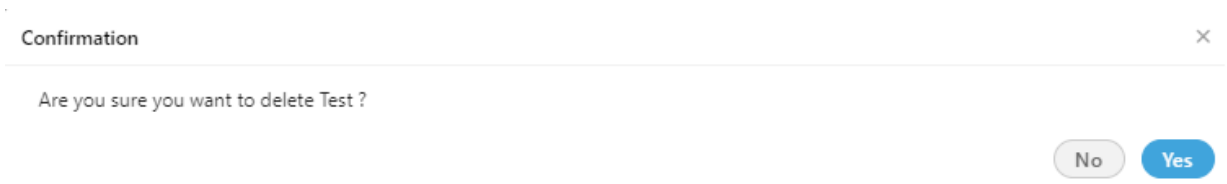


Figure: Added Nodeflows

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

Delete Routing Policy

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



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

Routing for Outbound

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

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

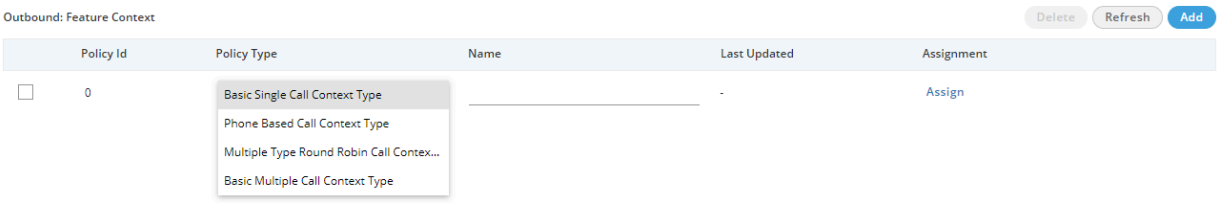


Figure: Adding an Outbound Routing Policy

3. Select any of the following Policy Types.

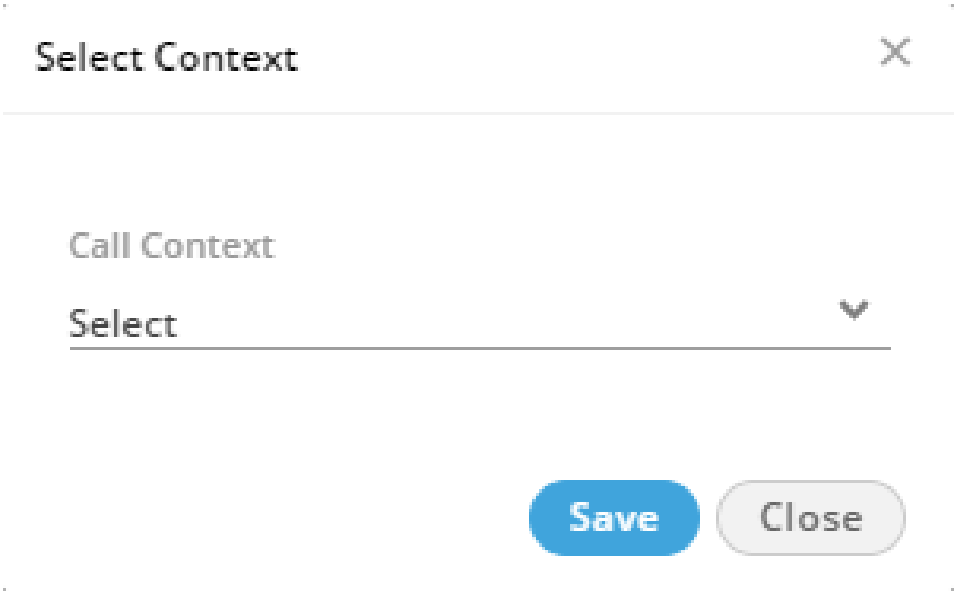
- **Basic Single Call Context Type:** It is the policy type in which outbound calls will be dialed out from the single call context.
- **Phone Based Call Context Type:** It is the policy type in which administrator can define the pattern on basis of which numbers will be dialed out from multiple call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

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

> The Outbound Routing with manual names will not work.

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

Single Call Context Type" on the page.



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

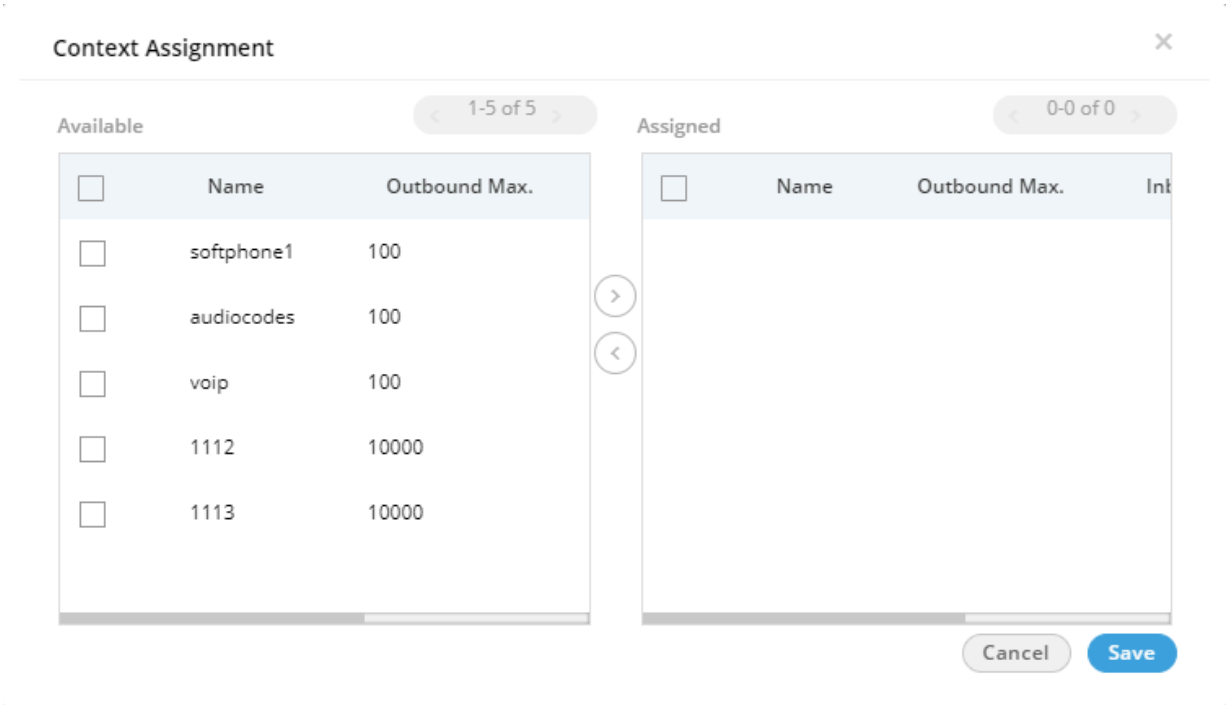


Figure: Select Call Contexts for Multiple Type Policy

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

1. Select the call contexts in "Available" section
2. Click (›) icon to proceed to assign the selected call contexts

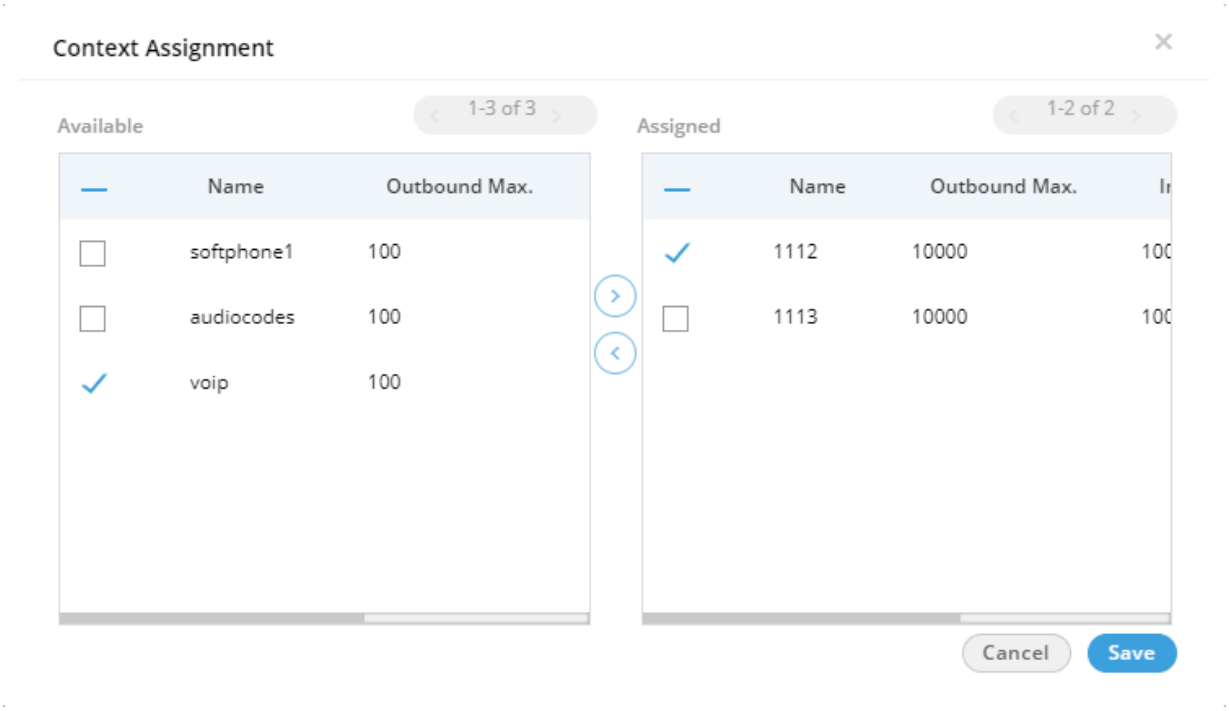


Figure: Assign or Unassign Call Contexts

3. Click "Save" to assign the call contexts to this campaign.
   Rather, you can click "Cancel" to not assign the Call Contexts.

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

5. Click "Save" to proceed to add the selected context to the routing policy.
6. Click "Apply" to create the Routing Plan for Outbound.

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

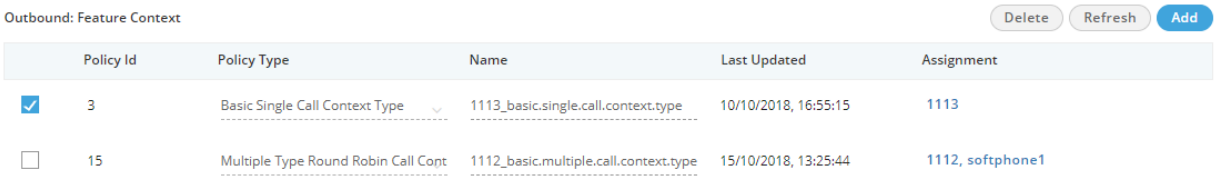


Figure: Added Outbound Routing Policies

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

Delete Routing Policy

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



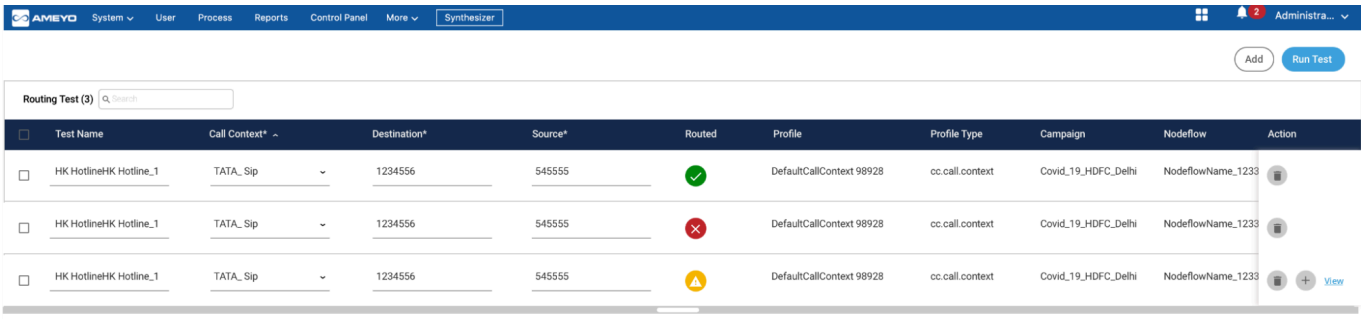
Figure: Delete Routing Policies

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

Saving Routing Test Result

When an administrator creates a routing test case, they may want to check that test case frequently so that any issues in the routing can be figured out easily. Allowing the administrator to save these test results saves an enormous amount of time for them.

On the Routing Test screen, the administrator can save the test cases. The saved test cases are listed on the same screen.



1. Administrator can also perform the following actions

2. Delete a test case or select multiple test cases and delete them
3. Search for a test case
4. Select the test case(s) they want to run
5. Edit a test case.

19.1.10.1.6.1. Types of Routing in Voice Campaign

Types of Routing in Voice Campaign

The following are the routing types in a Voice Campaign.

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

Skill-based Call Routing in a Voice Campaign

A skill-based routing in a voice campaign is based upon the skills of the agent assigned in that queue. It means that the calls will be first offered to the agents who have more skills as compared to others.

Business Use Case 1

Suppose a scenario in which there are two types of agents: some agents are experts in the Spanish language, whereas others are experts in the English language. Based upon their skill levels (ranges from 1-10), the administrator has provided the skill level to both types of agents. Now, a customer initiated a voice call and selected English as its preferred language for the conversation. The call for that customer will be handed over to the agent who has a higher skill level in the English language. The agents with a low skill level in English will get the call only if the agents of higher skill levels are busy.

Similarly, if a customer initiated a voice call with preferred language Spanish, then the agent with high Spanish skill will get the call first.

Business Use Case 2

There can be one more case in addition to the above scenario. Suppose one agent is assigned with both skills; that is, English and Spanish, but the skill level of Spanish is higher than English. In that case, the agent will get the Spanish calls first until either all Spanish calls have been answered (that is, there is no pending Spanish call left), or the SLA for the English calls does not breach.

Click here to know the steps to configure the Skill-based Call Routing.

Queue-based Routing for Voice Calls

A Queue-based routing in a voice campaign is based upon the priority given to the queues. It means whenever a call arrives; the system offers it to that queue, which has more priority over others.

Business Use Case

Suppose a scenario in which there are two queues: the first queue contains agents with more knowledge or experience, and the second queue has agents with less knowledge or experience. In this case, the priority for the first queue is more than the priority of the second queue. It means that whenever a call arrives in the system, the system tries to connect it with the agents assigned in the first queue. Only if the agents of the first queue are busy or not available, then the calls will be given to the agents available in the second queue.

Priority-based Routing for Voice Calls

A Priority-based routing in a voice call campaign is based upon the priority given to the calls initiated by the customers. It means that the calls which are more important for the business gets priority and answered first than to the calls with less priority.

Simple Business Use Case

Suppose a use case where the organization gets two types of calls: the first type of calls are sales driven that originates revenue to the company, and the second type of calls are of support. The priority for the sales calls is more than the priority of the support calls. Suppose a customer initiated a voice call of sales type, and at the same time, another call for support is also initiated by another customer. In this case, the sales call will be given priority over the support call. It means that the agent gets the sales call first, and after that, the support call will be offered to the agent.

Complex Business Use Case

Suppose a scenario where the business has two languages to serve the customers; for example, English and Hindi languages. All agents are either knowing both languages already or supposed to deal in both languages. In this case, there are three different business calls, which are sales, renewal, and care calls. The priority of these calls is that Sales calls have Priority 1, renewal has Priority 2, and care has Priority 3. For this scenario, the following solution can be possible.

Solution: Assign the skill levels of English and Hindi to all agents. Create queues for all the business calls as per the languages.

- sales_for_english
- sales_for_hindi
- renewal_for_english
- renewal_for_hindi
- care_for_english
- care_for_hindi

Assign the priority of the business calls in the selected nodeflow; that is, sales calls have Priority 1, renewal calls have Priority 2, and care calls have Priority 3.

Either all agents can be assigned in all of these queues, or the agents can be distributed in these queues as per requirement. Now, when a customer calls, then based upon the business type, the call will be distributed between the different queues and agents. The call with a high priority will be given more preference over the calls with less priority.

As per this solution, the calls with less priority have to wait for more than expected, and chances of call drop can be raised. To prevent this problem, we have to concentrate more on low priority calls also. Now, assign the SLA to all three types of calls, so that less priority call will be answered before its SLA is going to breach. For this, create a new queue named "OverFlow_Queue". Now, whenever a call of the low priority level is going to breach the SLA, it will be sent to the newly created "OverFlow_Queue", and thus all calls will be answered in this way.

19.1.10.1.7. Backend Configurations for Voice

Backend Configurations for Voice

There are several configurations through which the User (who has administrative privileges over the Server OS running Ameyo Application server) is able to optimize the Ameyo and increase it's usage according to the organizational need for the voice only setup.

All of these queries will be executed for the product database. Execute the following command to login to the database.

```
psql -U postgres <Ameyo_Database_Name>
```

> The database name in the above command is the name of the database which is configured to run the appserver. For example, ameyodb is the product database in our test case.

Enable Voicelog Recordings for Voice

In Ameyo, all the call that have been made by the agents are recorded. These recorded files are known as Voicelogs. The administrator can play or download these voicelogs to listen the conversation between the agent and customer.

Disable Dialing of Alphabet Strings

Execute the following query to disable the dialing of alphabet string through dialing screen of the agent.

```
INSERT INTO server_preference_store (context_type ,context_id,key,value)
VALUES
('contactCenter','<contact_center_id>','shouldAllowAlphabetsInPhone','true');
```

Resolve Customers using last 10 digits of Phone Number

There are multiple cases when the customers' phone numbers are received in different formats, such as with country code, without country code, with zero (0), or without zero (0). Even if a customer's number contains more than 10 digits and the first 2 or 3 digits represent the country code, still the method to resolve the customer for WhatsApp Chat was

considering only the first 10 digits. This was making the customer's phone number unresolvable.

In such a case, a backend configuration, named "phoneDigitsToBeConsideredFromEnd" can be done, which allows the system to consider only the last 10 digits of the customer's phone number. It means that the system will read the phone number starting from the end to the previous 10 digits.

For Example: Suppose the phone number of the customer IS "9876789812". Now, the customer's phone number appears like "+919876789812", "09876789812", and "9876789812". Thus, the system can assume this phone number as three-different phone numbers. But with this configuration, only the last 10 digits will be calculated, which is the "9876789812".

Execute the following query:

```
INSERT INTO system_configuration_parameter(name,type,value,default_value)
VALUES ('phoneDigitsToBeConsideredFromEnd','String',10','10');
```

19.1.10.2. Outbound Voice Campaign Settings

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

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

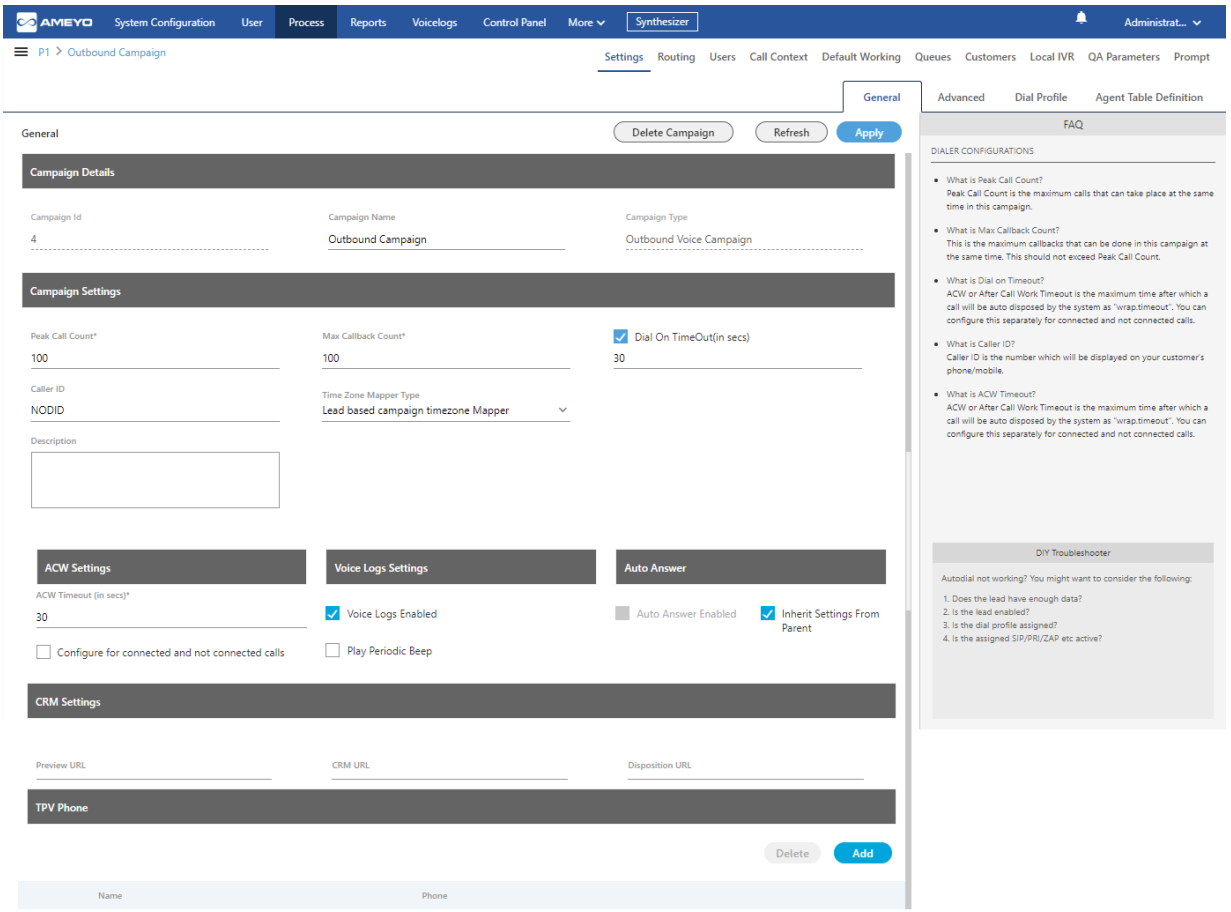


Figure: Settings of Outbound Voice Application Campaign

Per-Call-Context DID Configuration (4.13.28+)

Starting from version 4.13.28, administrators can assign a specific **DID (Direct Inward Dialing) number** and **description** per call context within an outbound campaign. This allows different customer segments or call types to display different caller IDs. A **failover DID** can also be configured so that if the primary DID is unavailable, the system automatically falls back to an alternate number.

Default IVR Visibility in Transfers (4.13.45+)

The `addDefaultIvrFeatureContextsForCampaign` flag controls whether the **Default IVR** appears in the agent's transfer dropdown for a given campaign. When set to `false`, the Default IVR option is hidden from the transfer list, giving administrators tighter control over which transfer destinations agents can select.

Version History

Version	Enhancement	Release Notes
4.13.28	Per-call-context DID/description configuration with failover	
4.13.45	`addDefaultIvrFeatureContextsForCampaign` to control Default IVR visibility in transfers	**Contact Center - Patch Release Notes - Version 4.13.45**

19.2. Supervisor Guide

19.2.1. Supervisor Login

Supervisors access the **Ameyo web-based interface** to monitor real-time operations and review historical performance data for the campaigns and processes assigned to them.

Accessing the Login Page

To log in to Ameyo, open the URL provided by the Ameyo team (in the following format) in your web browser:

```
<PROTOCOL>://<HOSTNAME_OR_IP>:<PORT_NUMBER>/app/#
```

Replace the following placeholders:

Variable	Description
<PROTOCOL>	Either **HTTP** or **HTTPS**
<HOSTNAME_OR_IP>	The **IP address** or **domain name** of the server where the Ameyo application is hosted
<PORT_NUMBER>	**8888** for HTTP or **8443** for HTTPS

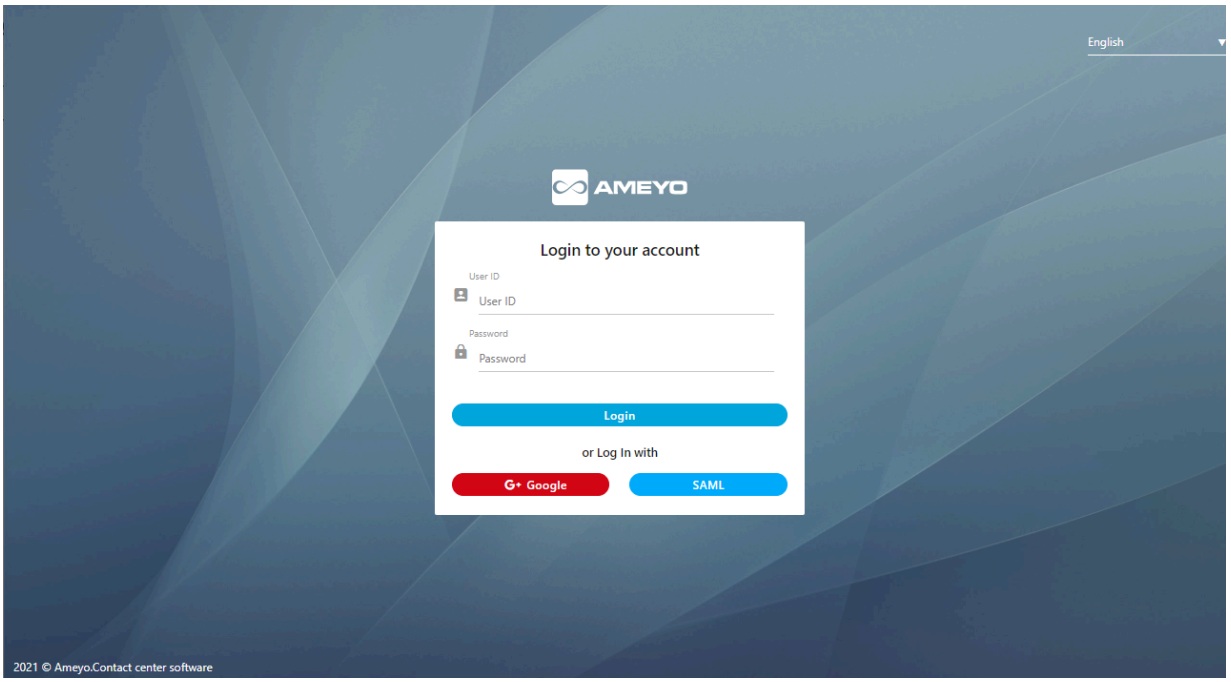


Figure: Login Screen

Login Methods

Supervisors can log in using one of the following methods based on configuration and licensing.

1. Normal Login

- Enter your **User ID** and **Password** (provided by the Administrator).
- Click **Login** to access the Supervisor Console.

2. Login with SAML (Licensable Feature)

Click **SAML** to log in using your **SAML (Security Assertion Markup Language)** credentials hosted on your organization's **Identity Provider (IDP)**.

SAML is an XML-based authentication framework that enables **Single Sign-On (SSO)** using a trusted third-party identity service, such as **Active Directory Federation Services (ADFS)**.

```
Cloud Support Limitations
```

- Ameyo public cloud supports up to **800–900 concurrent SAML logins**.
- For higher concurrency (up to **10,000 simultaneous logins**), **OAuth-based authentication** is recommended.

3. Login with Google (Licensable Feature)

Supervisors can also log in using their **Google Account** through **Single Sign-On (SSO)**.

In this case, Ameyo credentials are not required – authentication is performed directly via Google.

- Click **Google** on the login screen.
- Select your Google account to authenticate.

```
Important Notes:
```

- **SAML** and **Google Authentication** are **licensable features**.
- These must be **enabled and configured** by the Administrator from the backend.
- If licenses or configurations are not available, these options will **not appear** on the login screen.

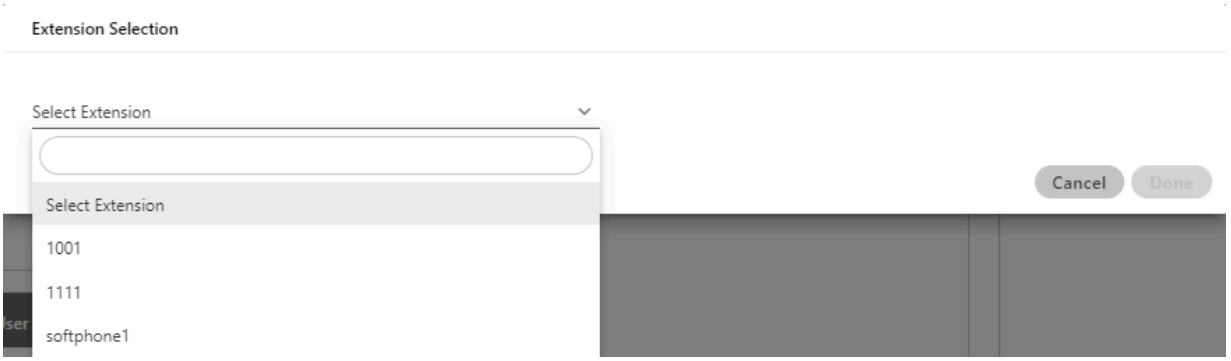
Post-Login Behavior

After successful authentication, the **Supervisor Home Page** is displayed.

If the Supervisor is assigned to a **Voice Campaign**, an **Extension Selection** pop-up will appear before accessing the console.

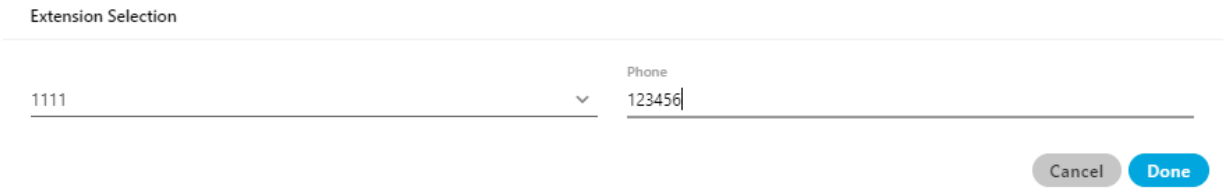
Selecting an Extension

1. From the **Select Extension** drop-down, choose the desired extension type:



   - **Softphone**
   - **Physical Phone**
   - **WebRTC**

2. **Softphone** is selected, an additional field appears prompting for the **Phone Number**.



3. Enter the number and click **Next** to proceed.

```
Tip:
```

```
The system saves your last-used extension configuration for quicker logins in
future sessions.
```

Licensable Features in Ameyo

Throughout this manual, the term **“Licensable”** indicates features that require a specific license to be visible and accessible within the user interface.

If the relevant license is **not activated**, those features will **not appear** in the Supervisor’s interface.

✅ **Summary**

Feature	Description
Normal Login	Log in using standard Ameyo credentials.
SAML Login	Enterprise SSO using Identity Provider (e.g., ADFS).
Google Login	SSO using a Google account.
Licensing	SAML and Google authentication must be licensed and configured.
Voice Campaign Extension	Supervisors must select an extension before accessing voice campaign features.

19.2.2. Supervisor Console

After logging in, the **Supervisor** gains access to the **Supervisor Console** – a unified interface for monitoring, managing, and controlling all assigned campaigns and processes in real time.

The console allows Supervisors to:

- View live agent and campaign activity.
- Modify agent states, queue parameters, and assignments.
- Access performance reports, logs, and control tools – all from a single workspace.

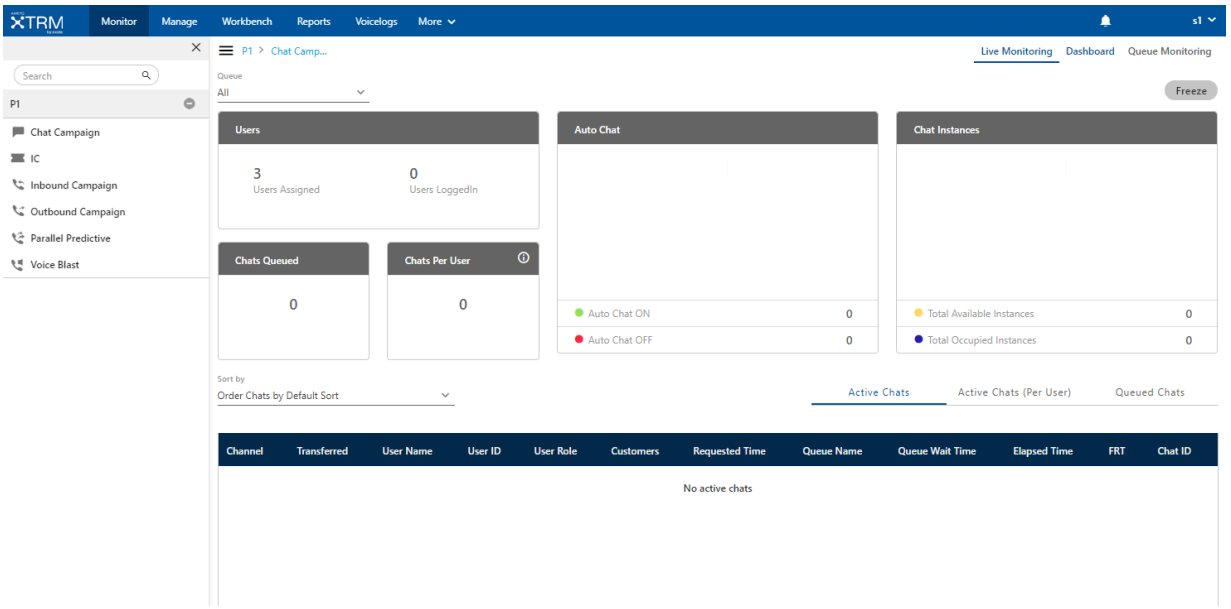


Figure: Supervisor Interface

Overview of the Supervisor Console

The Supervisor Console is divided into the following main sections:

- **Left Navigation Bar**
- **Monitor**
- **Manage**
- **Workbench**
- **Reports**
- **Voice Logs**

- **Internal Chat**
- **Bell Notifications**
- **Ameyo Control Panel (ACP)**

Each section serves a specific function, enabling Supervisors to efficiently oversee operations, manage configurations, and interact with agents.

Left Navigation Bar

The **Left-Side Navigation Bar** provides access to all campaigns and processes assigned to the Supervisor.

- When **collapsed**, click the **"= (Menu)"** icon to expand it.
- When **expanded**, click **"X"** to collapse the sidebar.

The navigation bar acts as the central hub – both the **Monitor** and **Manage** tabs dynamically update based on the selected **Process** or **Campaign**.

Process Settings

Supervisors can click on any **Process** in the navigation bar to access and modify its associated settings.

[Know more → *Process Settings Section*]

Monitor

The **Monitor** tab enables Supervisors to track the real-time performance of agents, queues, and campaigns to which they are assigned.

It provides visual insights into call activity, agent states, SLA adherence, and queue loads.

[Know more → *Monitor Tab Section*]

Manage

The **Manage** tab allows Supervisors to configure and control different campaign settings – such as agent assignments, queue properties, and routing rules – based on operational needs.

[Know more → *Manage Tab Section*]

Workbench

The **Workbench** enables Supervisors to log in as users to handle **Voice**, **Chat**, or **Email (Interaction)** campaigns.

From the Workbench, Supervisors can:

- Make and receive calls.
- Use call-control features such as **Confer**, **Transfer**, **Mute**, and **Hold**.
- Handle customer interactions across multiple channels.

```
The Supervisor Workbench has a similar interface and functionality as the Agent Console, except that certain agent-specific tabs (like Call Details) may be unavailable.
```

[Know more → *Workbench Section*]

Reports

The **Reports** tab provides detailed analytical insights into:

- **Call activity and performance**
- **Agent productivity**
- **Queue statistics**
- **SLA adherence**

Supervisors can use these reports to evaluate performance, plan resources, and ensure reporting accuracy through optimized configurations.

Voice Logs

The **Voice Logs** tab allows Supervisors to review and download recorded call audio files directly to their system for audit, training, or quality assurance purposes.

Ameyo Control Panel (ACP)

The **Ameyo Control Panel** enables Supervisors to perform system-level control operations and configurations, such as managing global settings, restarting services, or monitoring infrastructure health (if permitted by role).

Internal Chat

The **Internal Chat** feature allows Supervisors and agents to communicate internally for quick coordination.

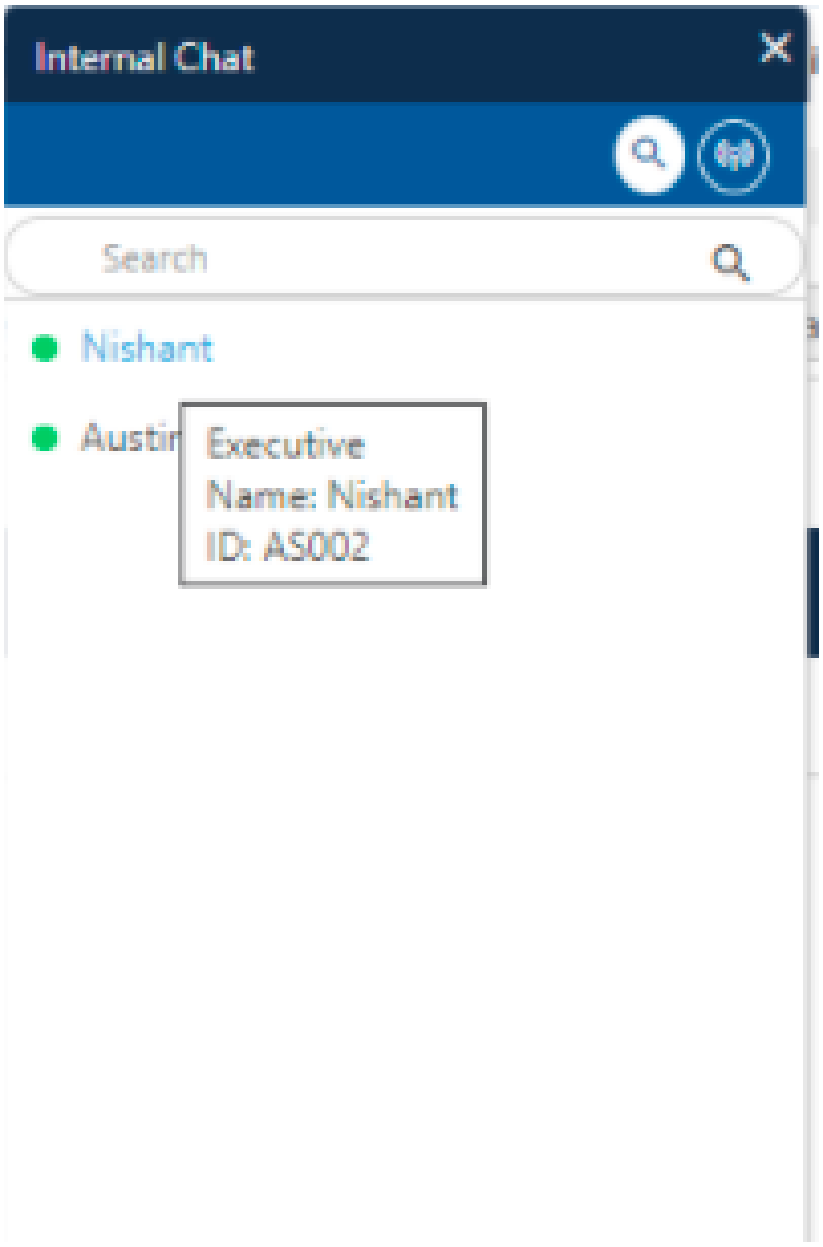
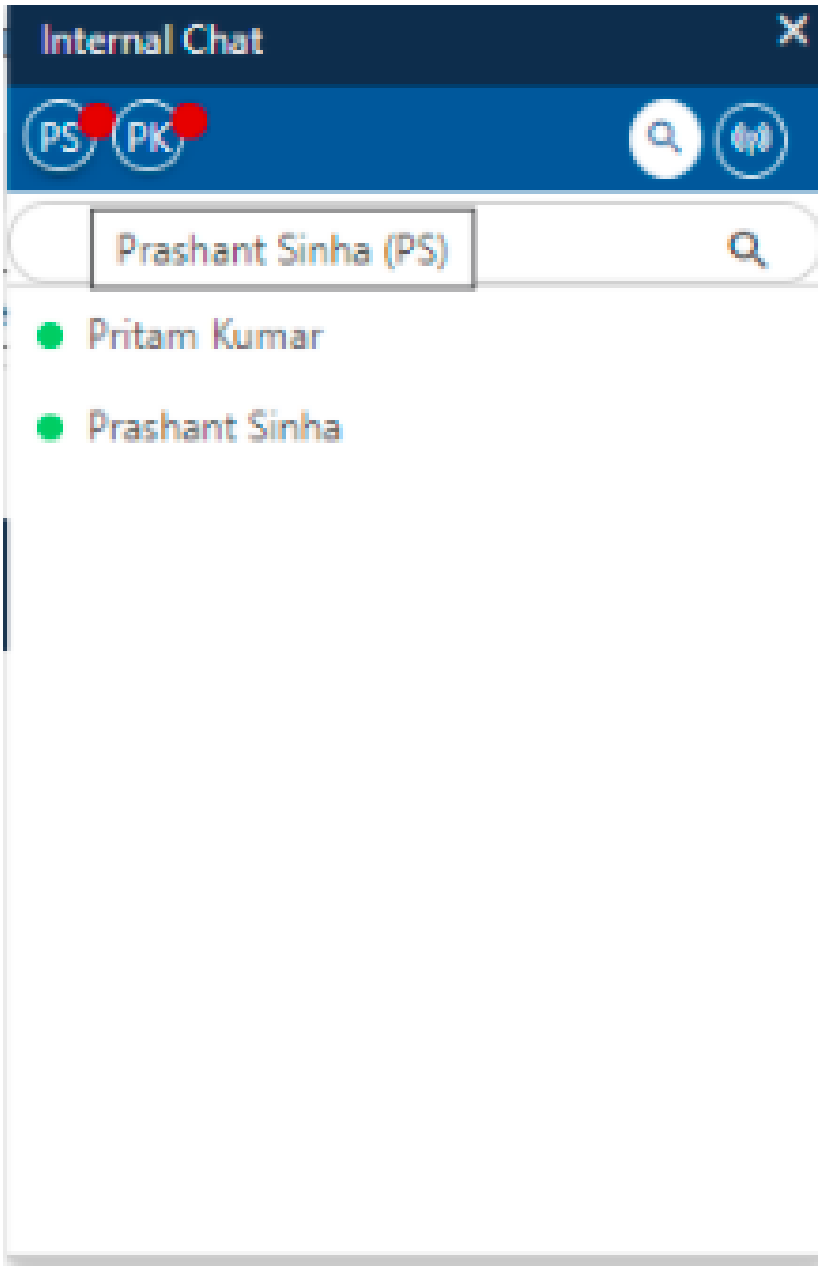


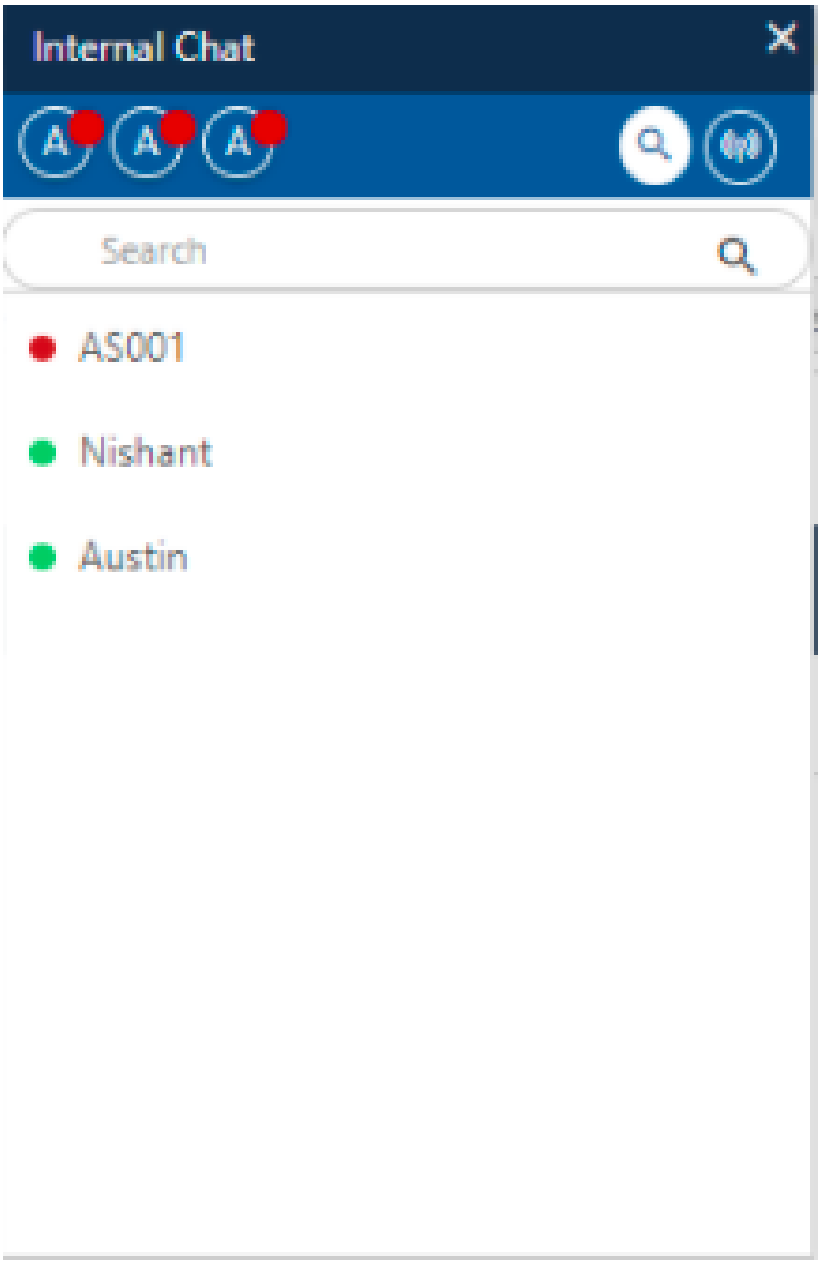
Figure: Internal Chat Window

Key Features:

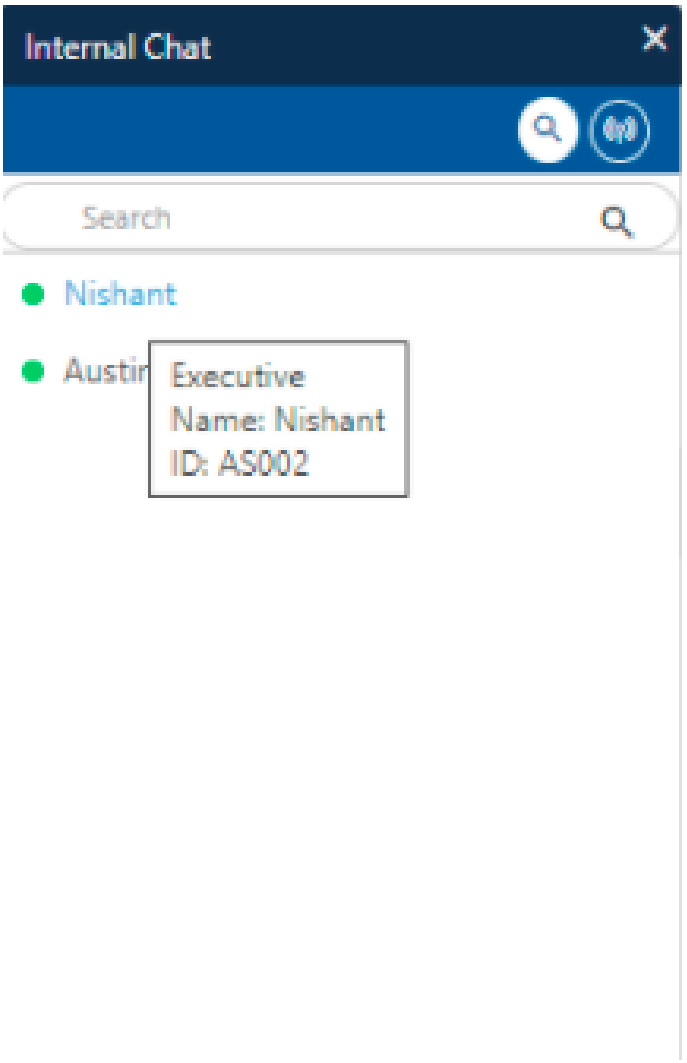
- Displays a list of active users at the top of the chat panel, shown by their initials (e.g., *John Doe → JD*).



- Hover over initials to view the **full username** and **user ID**.
- Search for users by **username** or **user ID** using the search bar.



- Hovering over a name in search results also shows detailed user information.



Note: This feature must be enabled by the Administrator.

Bell Notifications

The **Bell Icon** in the top bar displays system alerts and important notifications.

For example, the Supervisor may be notified about **inbound calls not being routed** or other system events requiring attention.

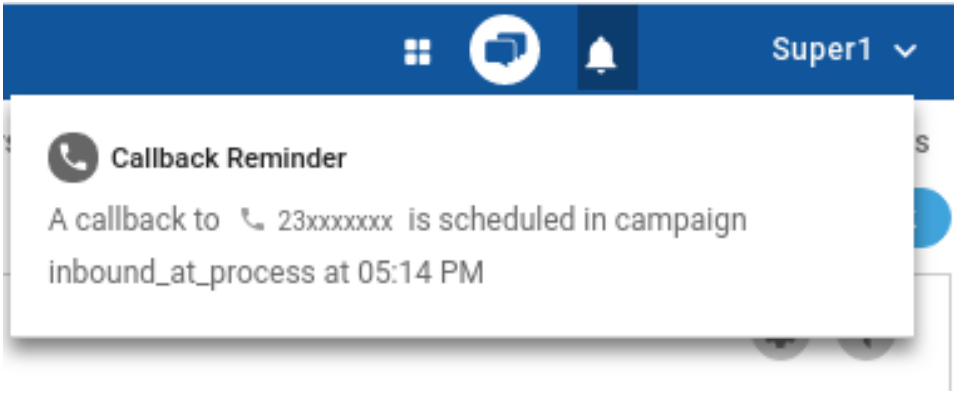


Figure: " Callback Notification" in Supervisor Console

Multi-Tab Operations

Supervisors can efficiently monitor multiple agents and campaigns simultaneously using **multi-tab support** within a single browser session.

Key Highlights:

- Supervisors can open **up to 5 active Ameyo tabs** in the same browser.
- Each tab can monitor different agents, campaigns, or reports.
- This enables simultaneous supervision across various processes without repeated logins.

Note:

- The **Workbench** can only be used in **one tab** at a time.Attempting to open it in multiple tabs will disable its functionality.
- Opening more than **five tabs** will render the additional ones non-functional.

Summary of Supervisor Console Sections

Section	Description
Monitor	Real-time monitoring of agents, queues, and campaign activity.
Manage	Configure campaign parameters, queues, and agent assignments.
Workbench	Handle calls, chats, or tickets directly like an agent.
Reports	View detailed campaign and agent performance metrics.
Voice Logs	Access and download call recordings.
Internal Chat	Communicate with team members via in-app messaging.
Bell Notification	Receive system alerts and performance notifications.
ACP (Control Panel)	Perform higher-level administrative or control operations.
Multi-Tab Support	Monitor up to five views simultaneously in separate tabs.

19.2.3. Process Settings

The **Process Settings** section allows Supervisors to view and manage configurations for all campaigns and users under a specific process.

It consists of several tabs, each designed for a specific administrative or monitoring function.

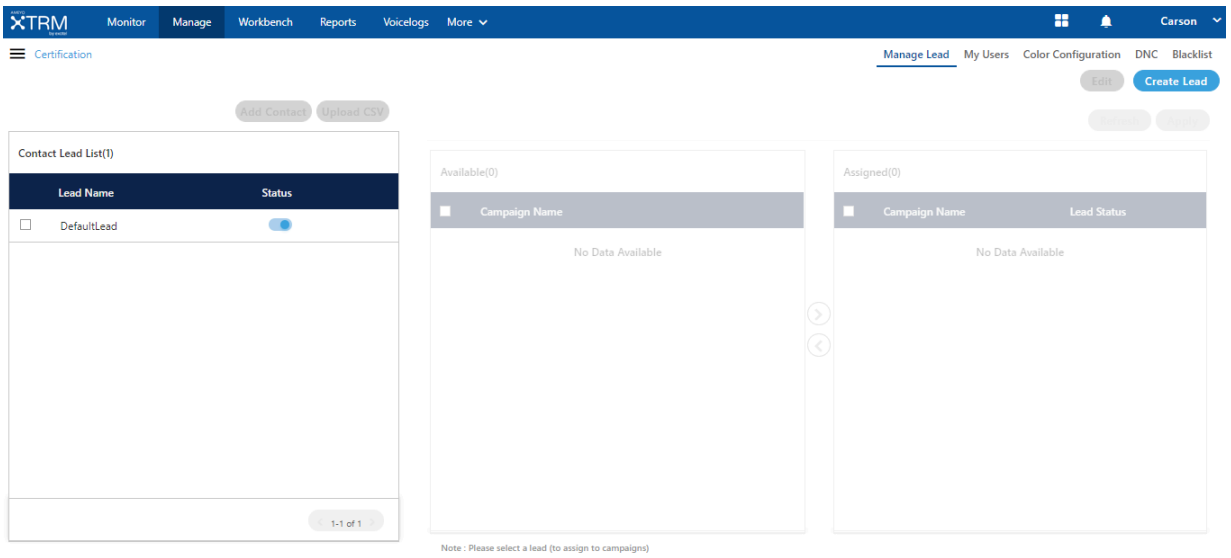


Figure: Process Settings

Navigation Path:

```
Sidebar → Select Process → Process Settings
```

From the **sidebar**, the Supervisor can click on any **Process** to open its **Process Settings** panel.

Below is an overview of all available tabs:

1. Manage Lead

The **Manage Lead** tab is available for all processes that include at least one campaign type - **Voice**, **Chat**, or **Interaction (Email)**.

Supervisors can use this tab to:

- View, filter, and manage customer leads associated with campaigns.
- Search for specific leads using defined parameters.

- Modify lead details, assign ownership, or initiate follow-up actions directly from the interface.

2. Users

The **Users** tab enables Supervisors to manage and update information related to the users (agents) assigned under their supervision.

Within this tab, Supervisors can:

- View a list of all assigned users within the selected process.
- Edit user details (such as skill group, status, or extension).
- Manage user availability or temporarily disable access as needed.

3. Color Configuration

The **Color Configuration** tab allows Supervisors to customize the **color codes** associated with different **Break Reasons** for users within the campaigns of the selected process.

This feature helps Supervisors quickly visualize agent states in real time – for example:

- **Green** for Ready
- **Red** for Break
- **Yellow** for After Call Work

Consistent color coding ensures easier monitoring and quicker identification of agent status changes.

4. DNC (Do Not Call)

The **DNC** tab is available **only for processes containing Voice Campaigns**.

It is not visible for processes that include only **Chat** or **Email (Interaction)** campaigns.

Supervisors can use this tab to:

- View, add, or remove phone numbers from the **Do Not Call list**.
- Ensure compliance with regulatory and organizational calling restrictions.
- Prevent outbound calls to restricted or blacklisted contacts.

5. Blacklist

The **Blacklist** tab operates at the **Process Level**.

If a Supervisor blacklists a contact, it will apply **only within that process** – it will not affect contacts in other processes.

This tab contains two sub-tabs for streamlined management:

- **Add to Blacklist** – to manually enter or import contacts to be blocked.
- **View Blacklist** – to review and manage already blacklisted numbers.

Supervisors can use this feature to maintain data hygiene and prevent repeated contact attempts to problematic or restricted numbers.

✅ **Summary**

Tab Name	Availability	Purpose
Manage Lead	Voice, Chat, and Interaction Campaigns	Manage and edit lead information.
Users	All Campaign Types	Manage users assigned under the process.
Color Configuration	All Campaign Types	Configure colors for agent break reasons.
DNC	Voice Campaigns Only	Manage the Do Not Call list.
Blacklist	All Campaign Types	Blacklist contacts at the process level.

19.2.3.1. Lead Management in Process

The **Lead Management** section allows Supervisors to create, edit, delete, upload, and assign leads to campaigns within a specific process.

```
Navigation Path:

Sidebar → Process Settings → Manage Lead


Note: Leads created or uploaded under one process are not shared with any other process.
```

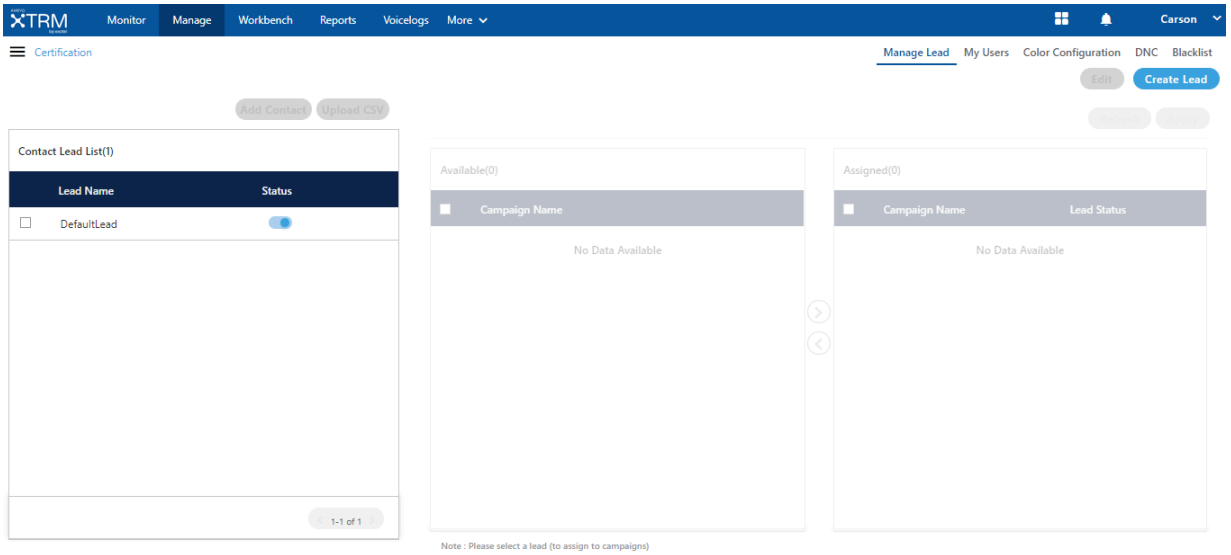


Figure: Manage Leads

Creating a Lead

Supervisors can create new leads at the **process level** (not at the campaign level).

1. Click **Create Lead**. A pop-up window appears prompting you to enter lead details.
2. Provide the following information:
    - **Lead Name**
    - **Time Zone**
    - **Lead Owner**
    - **Description**

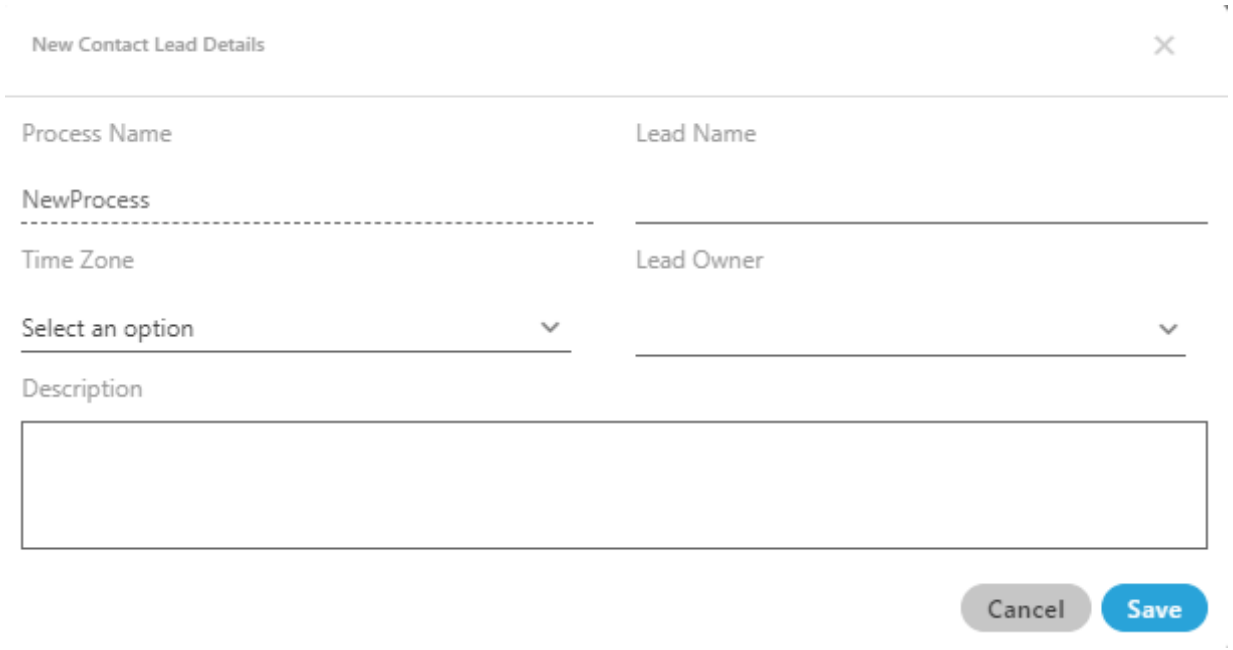


Figure: Create a Lead

3. Click **Save** to create the lead, or **Cancel** to discard changes.

`Note: Multiple leads can be created within a single process.`

Editing a Lead

1. Select the desired lead and click **Edit**.The **Edit Lead** modal appears.

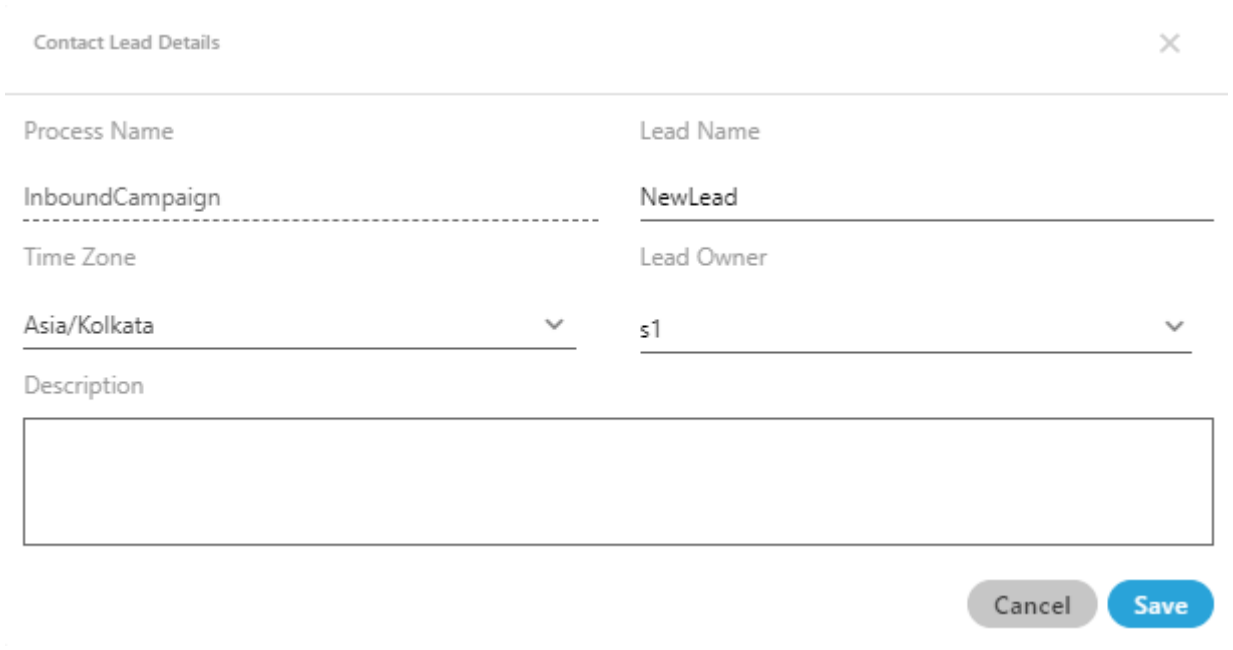


Figure: Edit the Lead

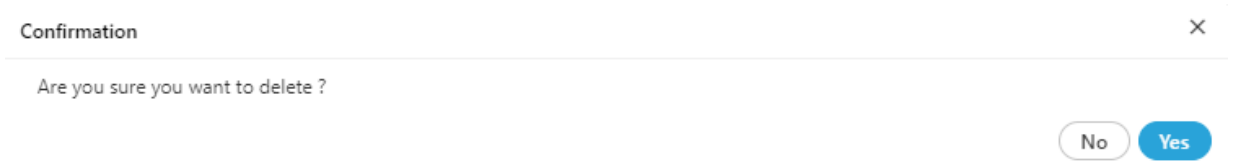
2. Update any of the following fields:(The **Process Name** cannot be changed.)

- Lead Name
- Time Zone
- Lead Owner
- Description

3. Click **Save** to confirm or **Cancel** to discard changes.

Deleting a Lead

1. Select the lead to delete and click the **Delete ()** icon.A confirmation dialog appears.



2. Click **Yes** to confirm, or **No** to cancel.

```
Caution: Deleted leads cannot be restored.
```

Enabling or Disabling a Lead

- To **disable** an active lead, click the **green toggle switch**.
- To **enable** a disabled lead, click the **gray toggle switch**.

This allows Supervisors to temporarily deactivate leads without deleting them.

Uploading Leads via CSV

Supervisors can bulk upload contacts into leads using a **CSV file**.

```
Recommendation: Use a CSV file that follows the same field order and schema as defined by the Administrator under: Console → System Configuration → Table → Table Definition
```

This ensures data integrity and smooth import.

CSV File Rules

- Follow the defined **Character Type**, **Nullable**, **Unique Key**, and **Primary Key** configurations.

- Ensure data formatting matches the field types set by the administrator.

Steps to Upload a CSV File

1. Select the lead in which the data should be uploaded.
2. Click **Upload CSV**. The **Upload CSV** pop-up appears.

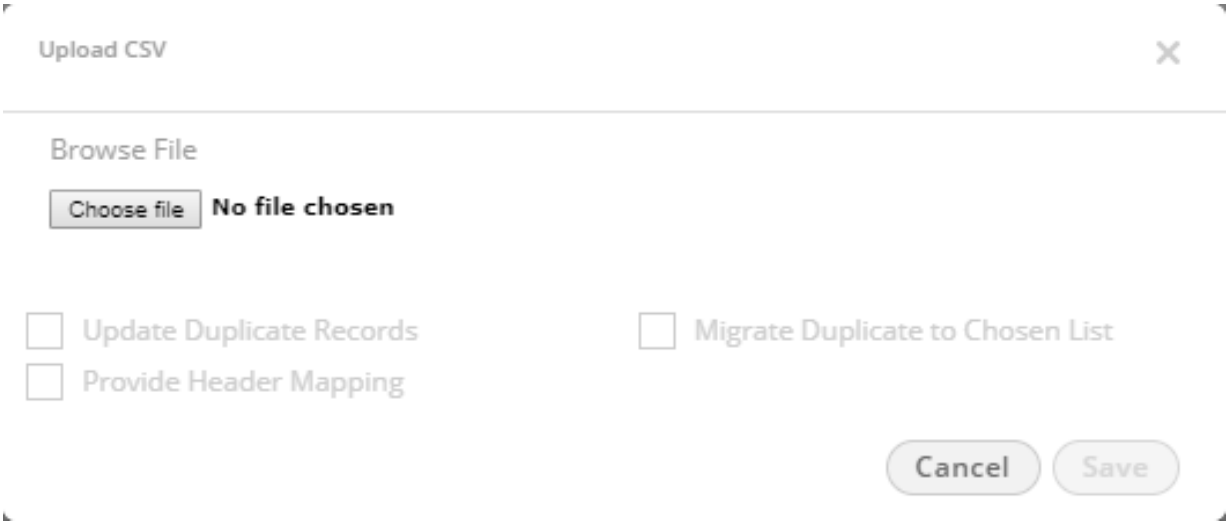


Figure: Upload Lead (Numbers) through a CSV file

3. Click **Choose File**, select the desired CSV from your disk, and click **Open**.

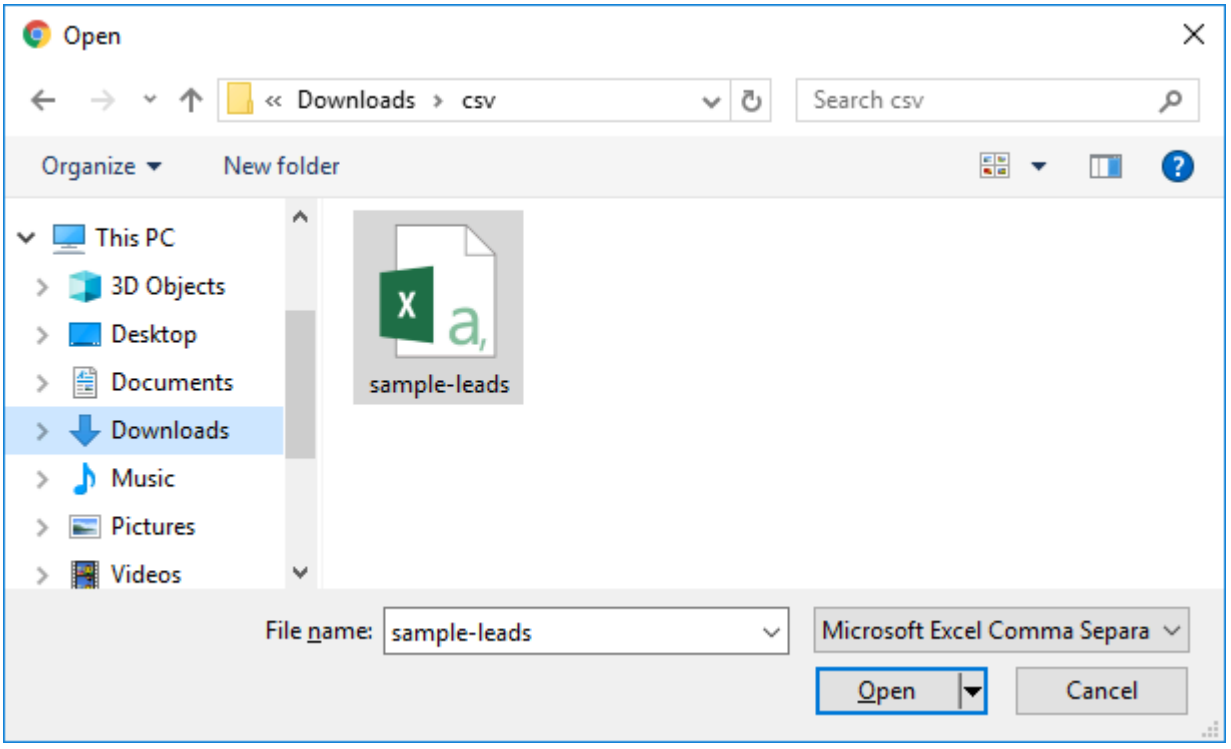


Figure: Select CSV file

4. Configure the following options before uploading:**Upload Parameters**
    - **Update Duplicate Records**Updates existing entries (if the same contact already exists) with new details.
        - If duplicate exists in a different lead → updates that lead only.
        - If duplicate exists in the same lead → record is updated, not duplicated.
    - **Migrate Duplicate to Chosen List**Moves duplicates from other leads of the same campaign into the new lead, carrying updated information.
    - **Provide Header Mapping** Map CSV headers to lead attributes like:Phone1, Phone2, Phone3, Phone4, Phone5, Timezone, Name

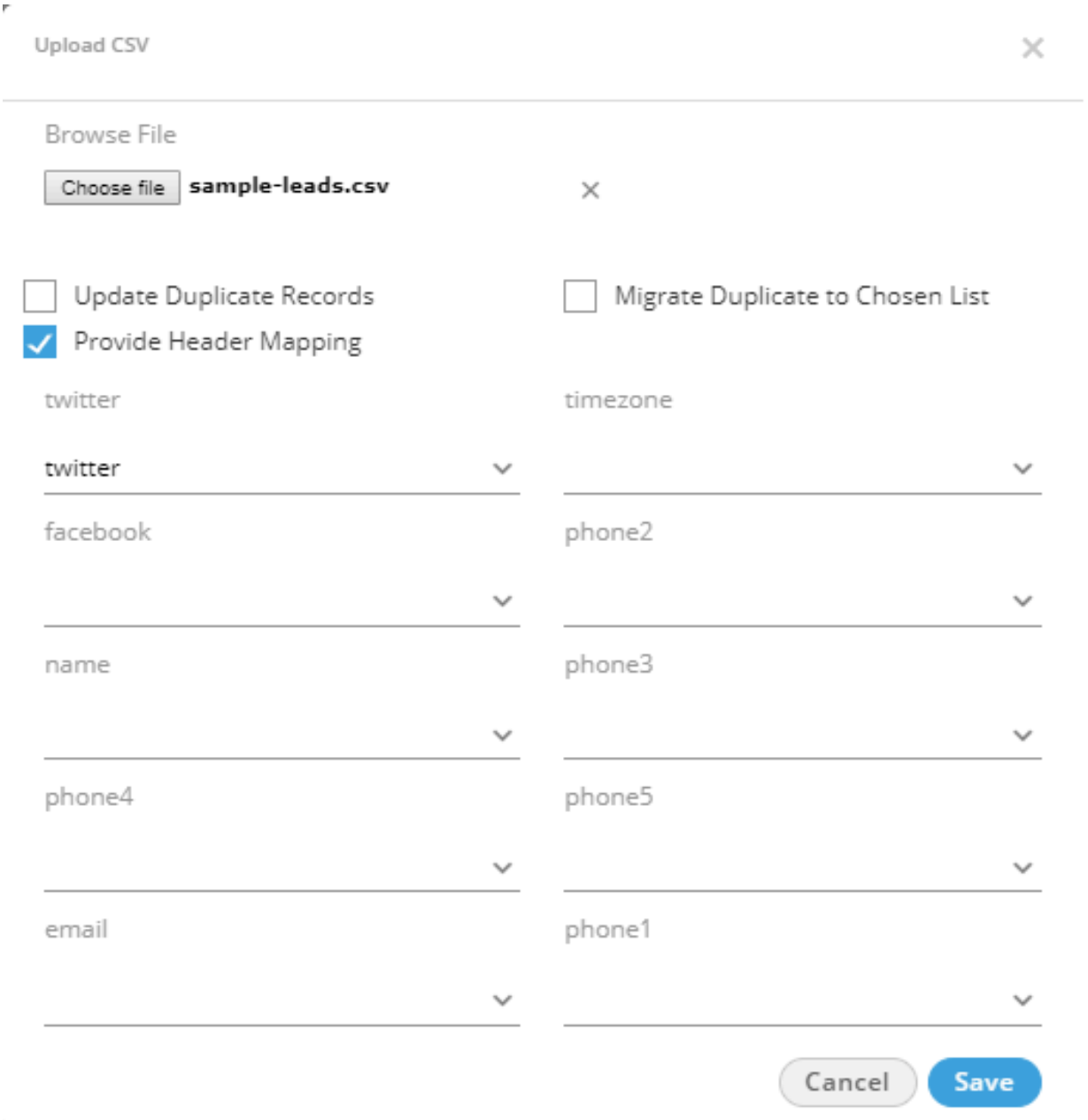


Figure: Mapping of Column Headers

5. Click **Save** to upload or **Cancel** to abort.

Tip: Enable the **“Churn Records”** option while uploading to process existing records as per churn logic.

Figure: Churn Records Option

Adding a Contact Manually

Supervisors can manually add individual contacts to a lead.

1. Select the desired lead and click

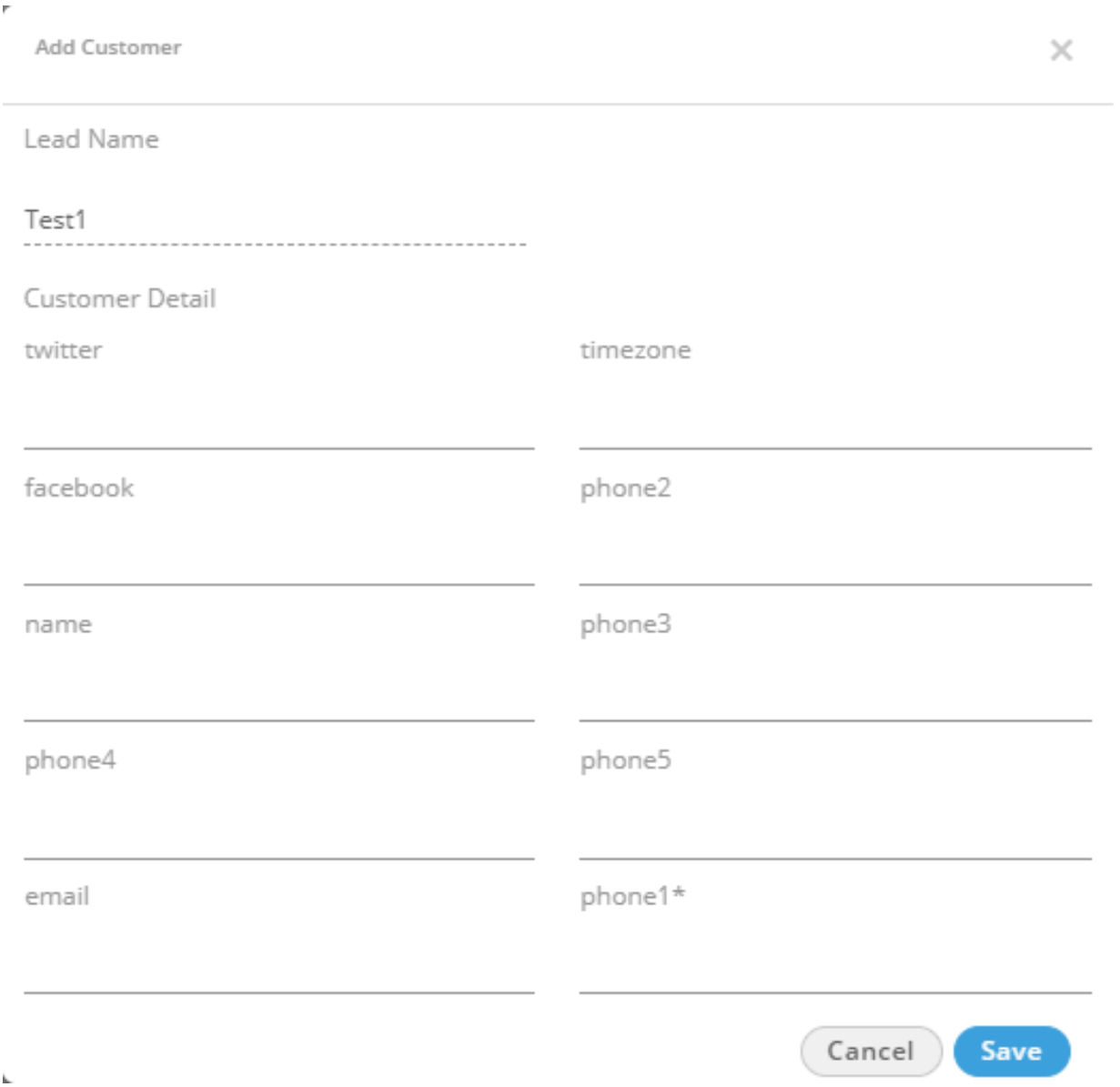


Figure: Add a Contact

2. Enter the following details as required:

- Name
- Email
- Phone Numbers (up to 5)
- Twitter or other contact fields

3. Click **Save** to confirm, or **Cancel** to discard.

Assigning or Unassigning Leads to Campaigns

Leads must be assigned to campaigns before they can be used for calling or interactions.

1. Select a lead. The associated **campaigns list** appears on the right side.

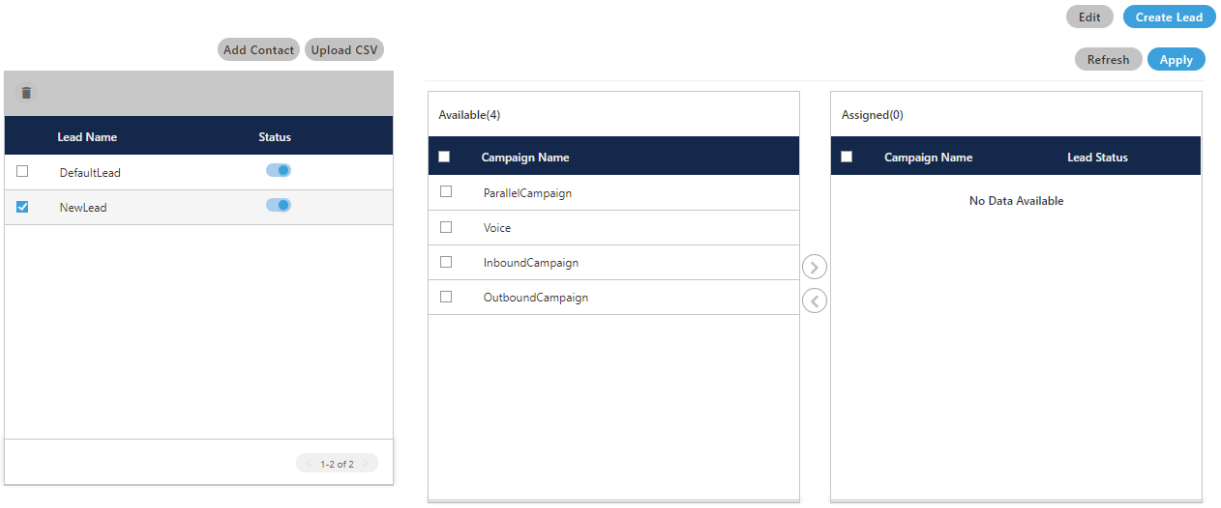


Figure: Assign or Un-assign Campaigns

2. In the **Available** section:
   - Select one or multiple campaigns using checkboxes.
   - Click the **right-arrow (→)** icon to assign.
3. Click **Apply** to save changes.

To **unassign**, select campaigns in the **Assigned** section and click the **left-arrow (←)** icon.

Click **Apply** again to confirm.

Special Case:

Handling Blank “Name” Fields

If the **Name** field in the Data Table Definition is:

- **Optional**, and
- **Configured as Unique**,

previously, leads with blank customer names might fail to upload for duplicate validation.

This issue has been **resolved** - now, leads with blank names upload successfully even if the field is marked unique.

Unassigned Lead Behavior

If a lead is unassigned from a campaign:

- The **STATE** of its customers is **lost**.
- The data becomes unavailable in the campaign view.
- The lead's records will no longer appear in campaign-level reports.

Making New Leads Visible in Manage Contacts & Dashboard

To ensure new leads and uploaded contacts appear in both **Manage Contacts** and **Dashboard**, follow these steps:

1. Create a new lead and upload contacts to it.
2. Assign the lead to at least one campaign.
3. **Enable** the lead.
4. Go to **Manage Lead → Enable Lead** at the campaign level.
5. Navigate to **Manage Contacts** under Lead Management and perform a **Churn** without applying any filter.

The uploaded contacts will now be visible on both:

- **Manage Contacts Screen**, and
- **Dashboard Screen**.

✅ **Summary Table**

Action	Description
Create Lead	Add new leads at the process level.
Edit/Delete Lead	Update lead details or remove unwanted ones.
Enable/Disable	Temporarily activate or deactivate a lead.
Upload CSV	Import multiple contacts at once using CSV.
Add Contact	Manually add a single contact to a lead.
Assign/Unassign Campaigns	Link or unlink leads with specific campaigns.
Header Mapping	Map CSV headers to process table definitions.
Churn Records	Refresh or reprocess contact data during upload.

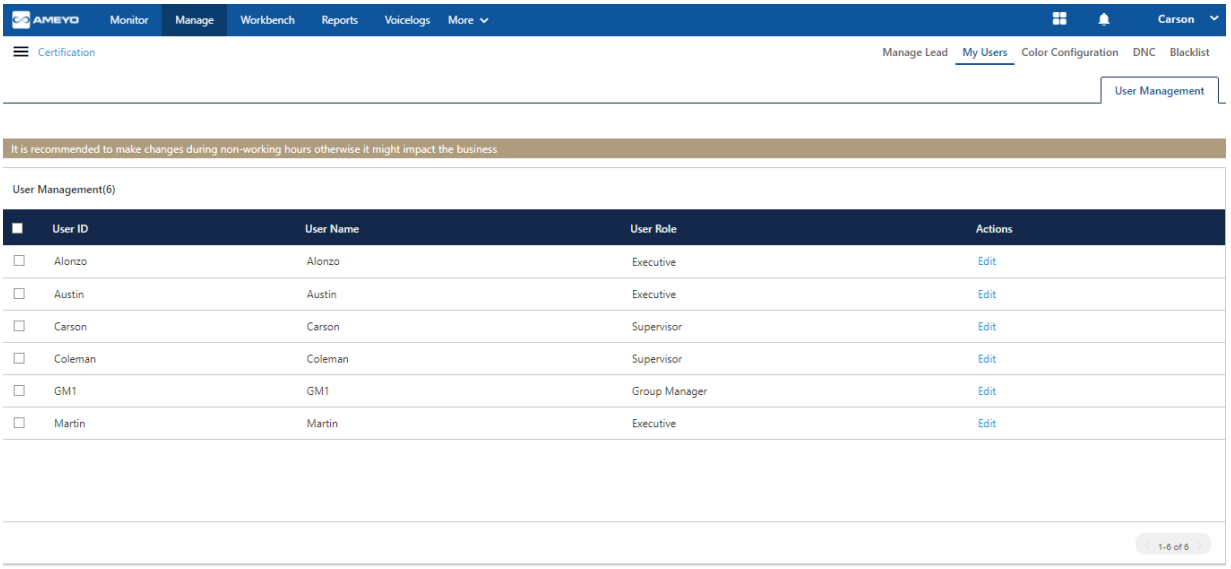
19.2.3.2. User Management

The **User Management** page displays all users who are assigned under the supervision of the logged-in Supervisor.

Supervisors can **view and modify user details** but cannot create or delete users.

User creation and deletion are **restricted to Administrators** only.

```
Navigation Path:Sidebar → Process Settings → Users
```



From this page, Supervisors can:

- View the list of all users assigned within their processes.
- Search users by name or ID.
- Modify user information and system privileges.
- Configure campaign-specific restrictions.
- Manage voicemail configurations (if licensed).

```
Note : Supervisors can only modify users; creation and deletion are managed by the Administrator.
```

Search a User

1. Enter the user's name in the **Search** bar.

2. Press **Enter** to display matching results.
3. Click the user's name or the **Edit (✎)** icon to modify their details.

Modify User

Supervisors can modify general user information, adjust privileges, and configure campaign-level access for assigned users.

1. Select the user by checking the box next to their name.
2. Click **Edit**.A pop-up window appears for user modification.

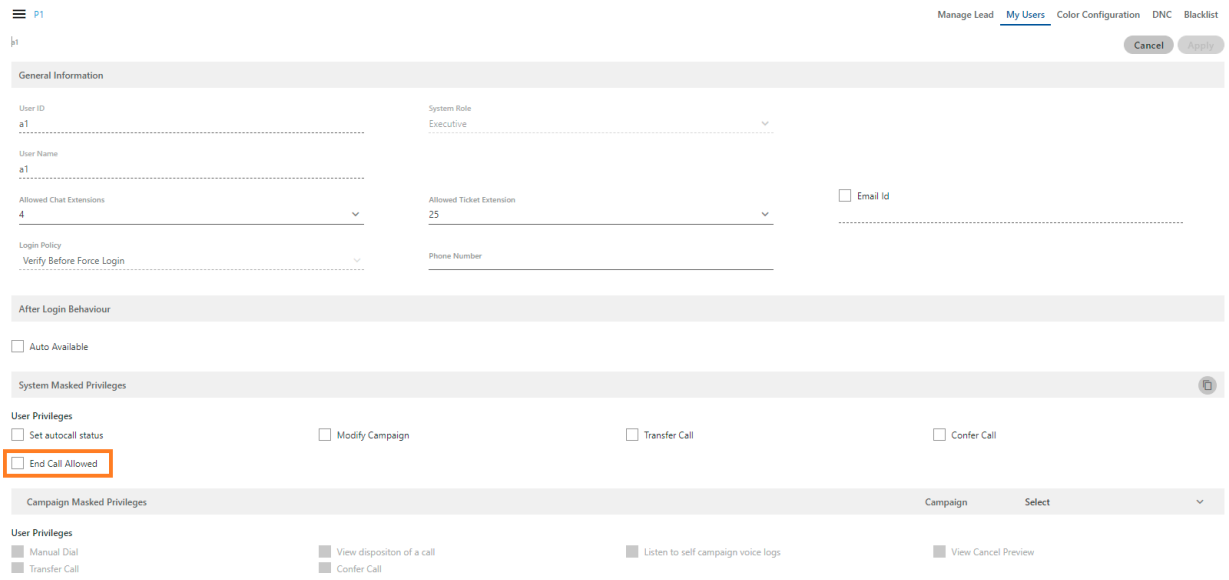


Figure: Modify a User

Editable Information

1. General Information

Supervisors can modify the following fields:

- **Allowed Chat Extensions** – Enable or disable specific chat extensions for the user.
- **Allowed Ticket Extensions** – Manage ticket extensions accessible to the user.
- **Email ID** – Check or uncheck to include an email address.
- **Add, Modify, or Delete Email Addresses.**
- **Enable/Disable Screen Recording** – Allow or restrict recording of user's screen sessions.

2. After Login Behaviour

- **Auto Available** – Enable this setting to make the user automatically “Available” upon login.When unchecked, the user must manually change their status to Available after logging in.

3. System Masked Privileges

System-level privileges allow the Supervisor to restrict specific user actions globally across the system.

Enable the checkbox beside a restriction to apply it.

Privilege	Description
Set Auto Call Status	Prevents the user from enabling or disabling auto call mode.
Modify Campaign	Restricts the user from changing campaigns after login (even if assigned to multiple).
Transfer Call	Disables the ability to transfer calls to another user or campaign.
Confer Call	Restricts the user from initiating conference calls.
End Call Allowed	Prevents the user from manually ending calls – only customers can hang up.

```
Note: These restrictions apply system-wide and affect all campaigns assigned to the user.
```

4. Campaign Masked Privileges

Campaign-level masking allows the Supervisor to restrict user actions **within specific campaigns**.

Select the target campaign from the dropdown list to apply restrictions.

Privilege	Description
Manual Dial	Prevents users from manually dialing numbers in that campaign. Useful for inbound campaigns.
View Disposition of a Call	Hides the call disposition list in the dialer, forcing call closure from CRM only.
Listen to Self Campaign Voice Logs	Restricts users from listening to their own call recordings.
View Cancel Preview	Disables the user's ability to cancel customer preview in preview dialing.
Transfer Call	Restricts the user from transferring calls in this specific campaign.
Confer Call	Disables the user's ability to start a conference call.

Note: If a user is assigned to multiple campaigns, restrictions must be applied **individually for each campaign**.

5. Voice Mail Configurations (Licensable)

Feature Availability: This option is visible only when the **Voicemail license** is enabled for the contact center.

Supervisors can manage voicemail configuration at the user level.

1. Enable voicemail by toggling the **Voicemail** switch **ON**. If disabled, no voicemail will be recorded.
2. Enable **Notification Email IDs** to send voicemail notifications.
3. Enter multiple **Notification Email IDs** (Gmail domain only) separated by commas.Example: agent1@gmail.com, supervisor@gmail.com
4. Select audio prompts:
    - **Welcome Voicemail Prompt**
    - **Finish Voicemail Prompt**
5. Click **Apply** to save changes, or **Cancel** to discard.

Tip: Supervisors can enable voicemail alerts for selected users to ensure no customer messages are missed during off-hours.

Summary Table

Section	Purpose
General Information	Update user's extensions, email, or screen recording options.
After Login Behaviour	Set whether user becomes available automatically post-login.
System Masked Privileges	Apply global user restrictions (e.g., transfer, confer, or call end controls).
Campaign Masked Privileges	Restrict user actions within specific campaigns only.
Voicemail Configurations (Licensable)	Enable or configure voicemail recording and notifications.

19.2.3.3. Color Configuration

The **Color Configuration** feature allows Supervisors to assign specific colors to **Break Reasons** and **Threshold Breaches** for users assigned within a process.

These colors are displayed in the **Monitor tab** of the respective campaign, helping Supervisors visually identify agent statuses and performance conditions at a glance.

Navigation Path: `Sidebar → Process Settings → Color Configuration`

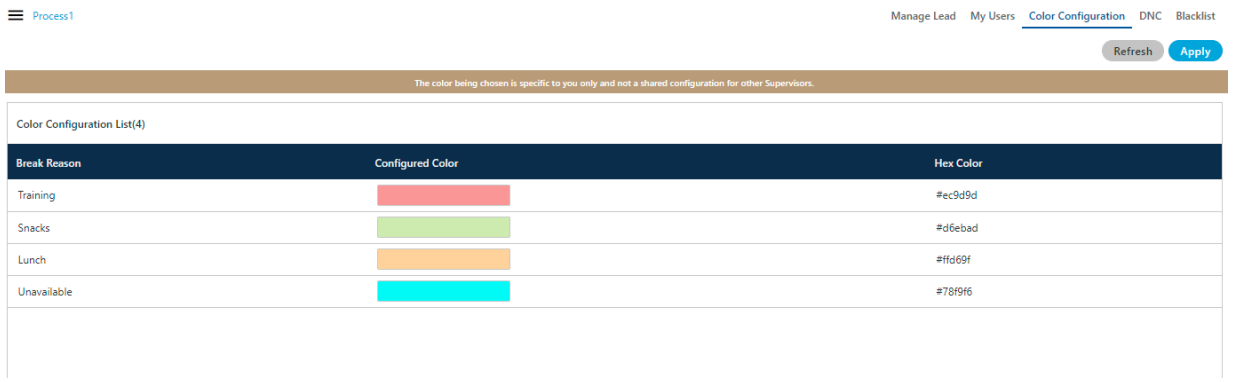


Figure: Color Configuration Screen

Key Information

At the top of the page, the following informational message appears:

> **"The color being chosen is specific to you only and not a shared configuration for other supervisors."**

This means that:

- The color settings configured by one Supervisor are **personal** and **not shared** with others.
- Each Supervisor can define their own color preferences independently.
- Supervisors can search and configure colors for break reasons from this screen.
- All **Break Reasons** are created by the **Administrator**.
- Supervisors can **only assign or edit colors** for those predefined break reasons – they cannot create new ones.

- The configured colors are reflected in the monitoring dashboards for that specific Supervisor session.

Searching for a Break Reason

Use the **Search** bar at the top of the page to quickly locate a specific break reason.

Type the break reason name and press **Enter** to filter the list.

Configuring a Color

Follow these steps to assign or modify a color for any break reason:

1. Locate the desired **Break Reason** in the list.
2. Click the **color box** in the **Configured Color** column. A **color palette pop-up** appears.

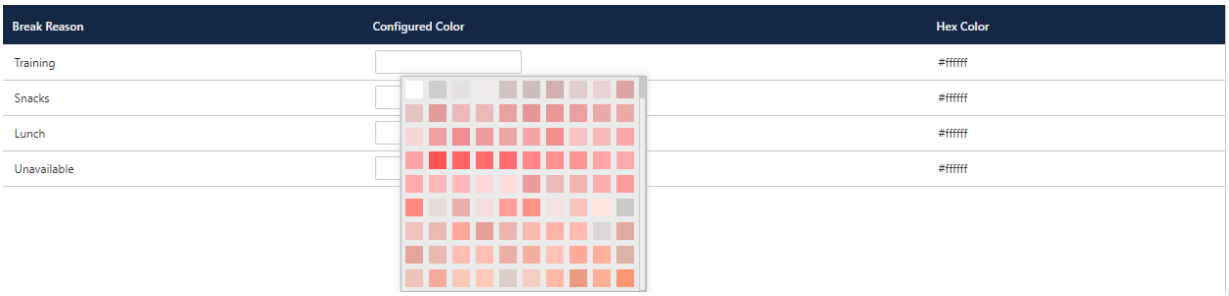


Figure: Color Selection pop-up

3. Select the desired color from the palette. You can scroll to view all available color options.
4. Once selected, the chosen color fills the textbox adjacent to the break reason.



Figure: Configuring the Color

5. Click **Apply** to save your changes.

Note: A confirmation message — *"The color being chosen is specific to you only and not a shared configuration for other sessions."* — reappears to remind you that this configuration is **Supervisor-specific** and not global.

Editing Existing Colors

To change the color for a previously configured break reason:

1. Click the existing color box next to the break reason.
2. Choose a new color from the pop-up palette.
3. Click **Apply** to save the update.

The new color immediately replaces the old one in your monitoring view.

Column Description

Column Name	Description
Break Reason	Displays the name of the break reason created by the Administrator.
Configured Color	Displays the currently selected color for each break reason. Supervisors can click this box to change the color.
Hex Color	Shows the hexadecimal color code (e.g., #FF5733) corresponding to the selected color.

Example Use Case

- **Available (Ready)** → Indicates agents ready for calls.
- **Meeting** → Represents agents in a scheduled meeting.
- **Break** → Used for short breaks (e.g., tea, snacks).
- **Lunch** → For lunch breaks or longer offline periods.
- **Threshold Breach** → Highlights when agent performance metrics exceed set limits.

Summary Table

Action	Description
Search Break Reason	Locate a specific break reason using the search bar.
Configure Color	Assign a custom color for a selected break reason.
Edit Existing Color	Modify colors for break reasons already configured.
View Hex Code	Identify the exact hexadecimal code for the chosen color.
Apply Changes	Save and apply all new color configurations.
User-Specific Settings	Colors are personal to the Supervisor and not shared with others.

19.2.3.4. DNC Management

The **DNC Management** (Do Not Call) module allows Supervisors to manage exclusion lists that prevent specific customers or numbers from being dialed through the Ameyo system.

These exclusions are applied at the **process level** – not at individual campaign level – ensuring that restricted contacts are blocked across all campaigns under the same process.

Navigation Path: Sidebar → Process Settings → DNC

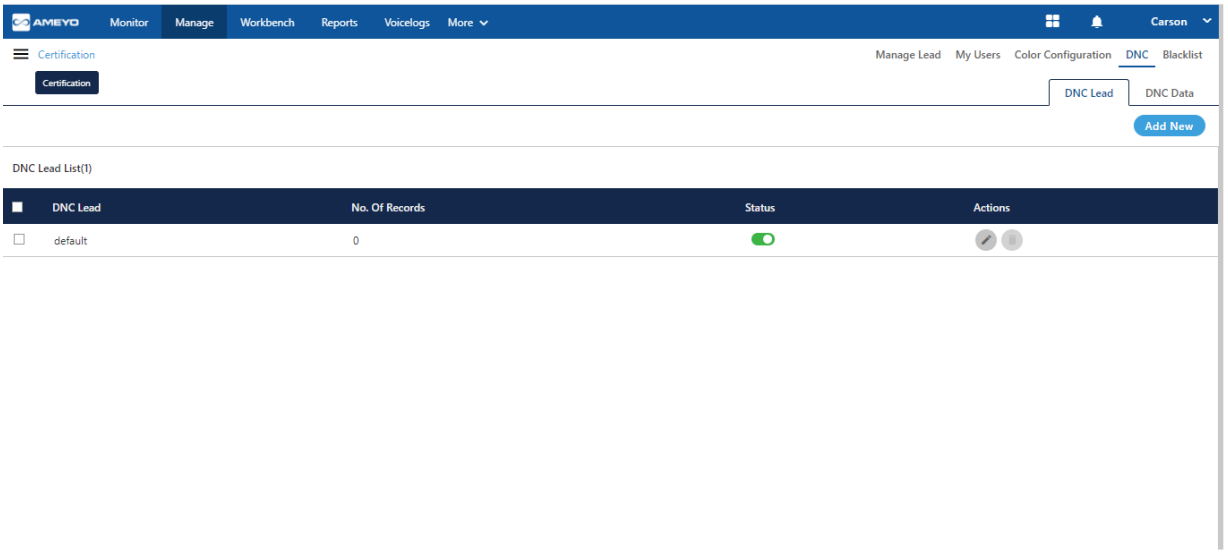


Figure: DNC Management

Overview

- Supervisors can create, view, edit, and delete exclusion lists (DNC Leads).
- Only **Administrators** can define **Table Definitions** for a process and mark a field as **Primary** (for example, phone1 or customer_id).
- Supervisors must map their uploaded data to this **Primary Field** when uploading DNC lists through CSV.

Note: Uploading exclusions based on the Primary-marked field requires PostgreSQL 9.4 or higher.

Ameyo Server v4.6 and v4.7 use PostgreSQL 10 — which is recommended for this feature.

DNC Management Page Fields

Field	Description
Exclusion Lead	Name of the exclusion list created.
No. of Records	Number of records uploaded in the exclusion list.
Status	Indicates whether the exclusion is active or disabled. Toggle the switch to enable or disable.
Actions	Edit or delete the exclusion list.

Even if you need to add **a single number**, it must be uploaded through a **CSV file** — manual entry is not supported.

Creating an Exclusion Lead

To add numbers or customers to the DNC list:

1. Click **Create Exclusion Lead**. The **Add Exclusion** pop-up appears.

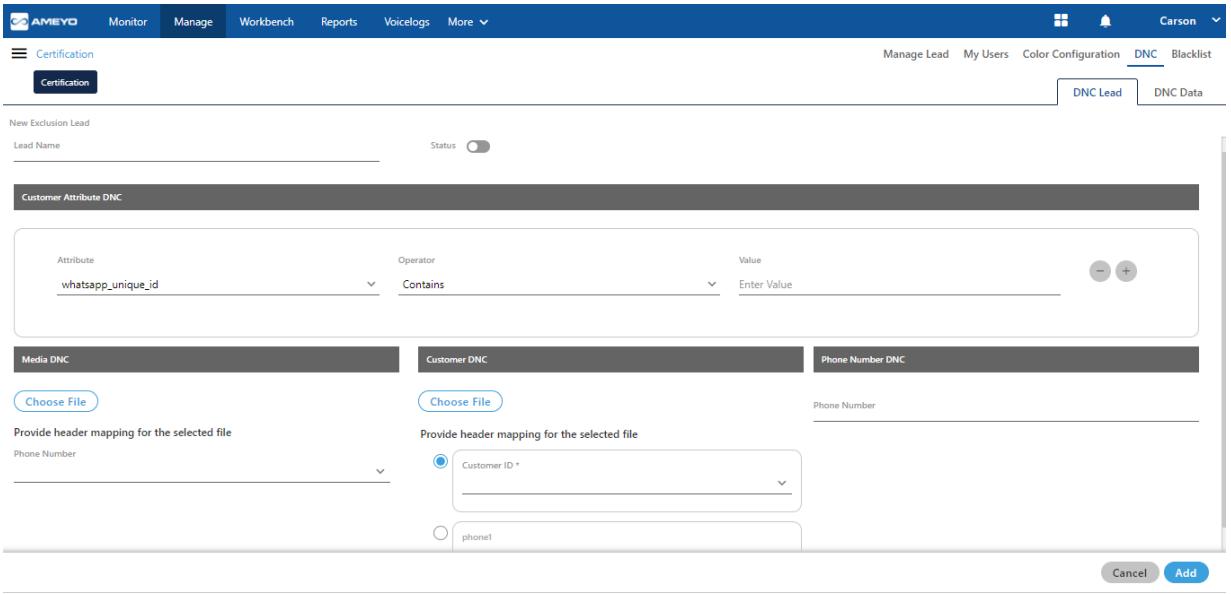


Figure: Adding an Exclusion

2. Enter the following details:
    - **Exclusion Lead Name** – A name for your DNC list.
    - **Status** – Check **Enable** to activate the exclusion immediately.
3. Choose the **Type of Exclusion** (four options available).

1. Attribute Exclusion

Allows you to create rules based on customer attributes (e.g., phone, timezone, name, etc.).

Steps:

1. Click **Add** to create a new condition.



Figure: Add Attribute

2. Select an **Attribute** (from Table Definition Columns configured by the Administrator).Available attributes include:
    - phone1, phone2, phone3, phone4, phone5, email, timezone, twitter, facebook, name
3. Select an **Operator**:
    - equal to, not equal to, greater than, less than, like, not like, SQL expression
4. Enter the **Value** for the condition.
5. Click **+** to add another condition or **–** to remove one.

2. Media Exclusion

Upload a CSV file containing phone numbers to exclude.

Your CSV must include the header field marked as **Primary** (e.g., phone1).

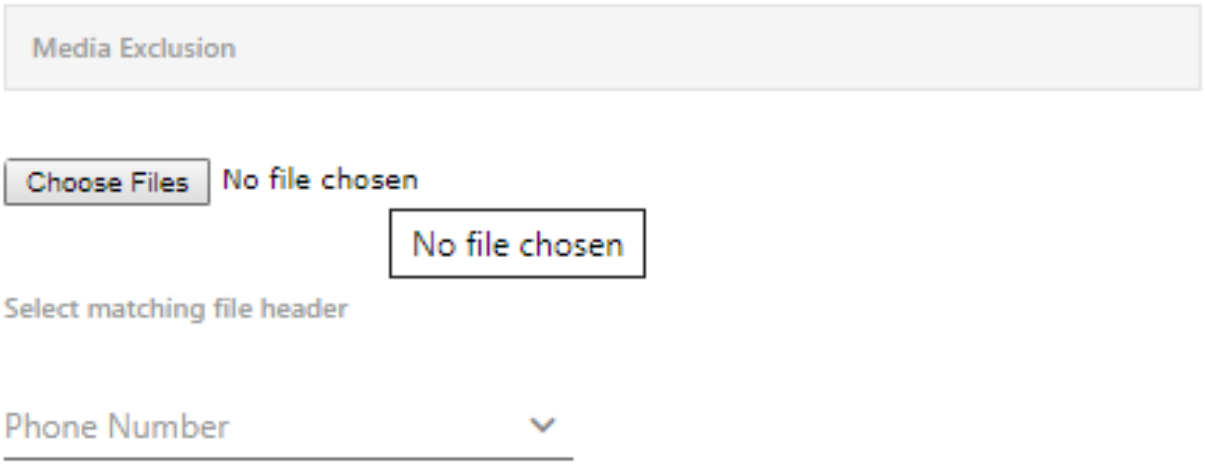


Figure: Media Exclusion

Steps:

1. Click **Choose File** → select your CSV → click **Open**.

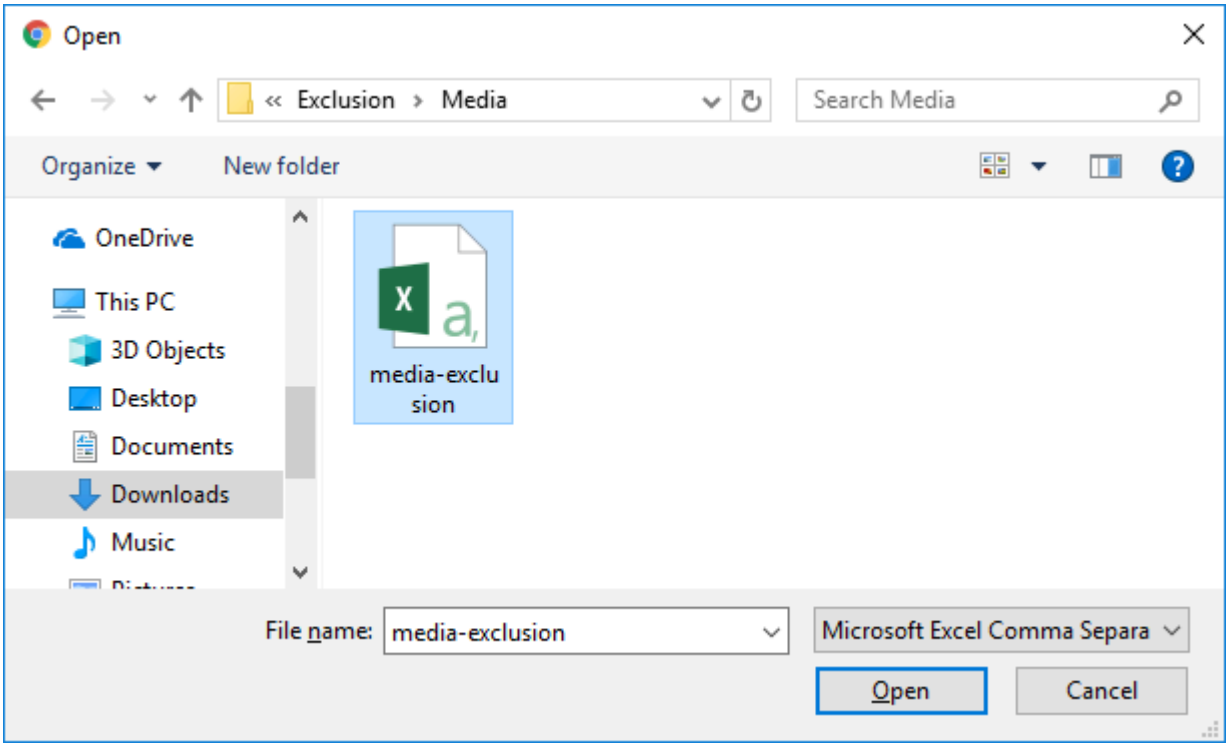


Figure: CSV File

2. Select the **Primary field** (e.g., phone1) as defined in the Data Table Definition.
3. The selected file appears under the **Media Exclusion** section.

3. Customer Exclusion

Upload a CSV file containing customer IDs that should be excluded.

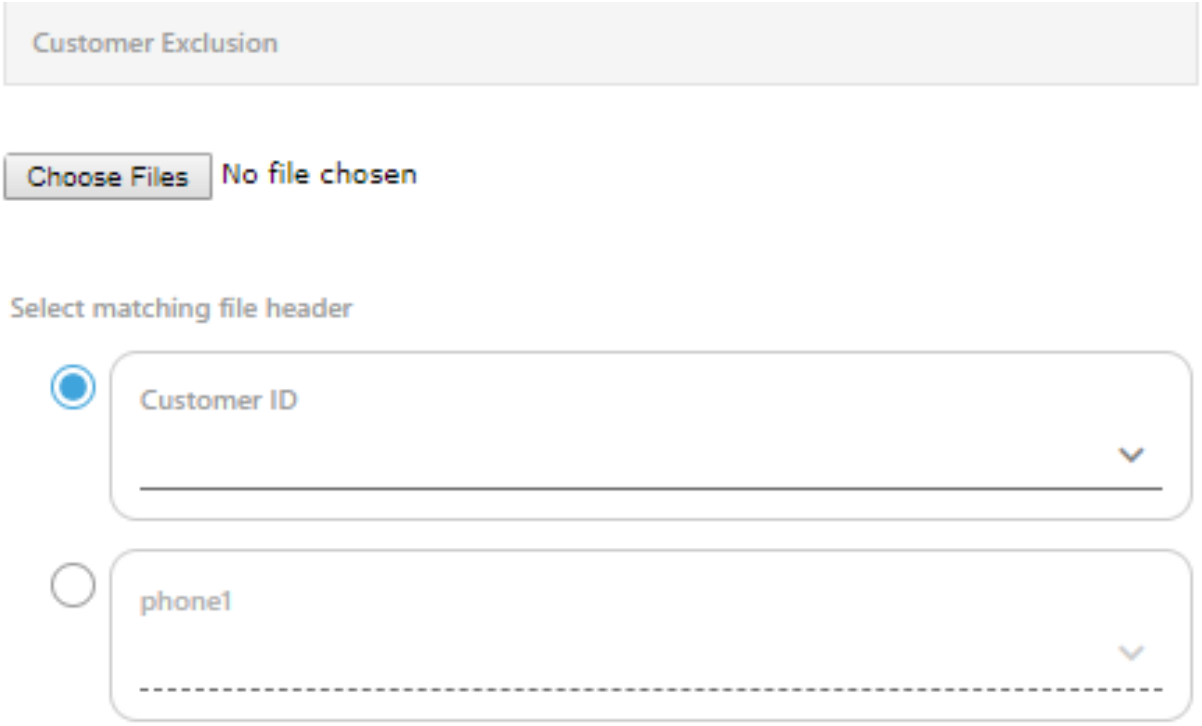


Figure: Customer Exclusion

Steps:

1. Click **Choose File** → select your CSV → click **Open**.

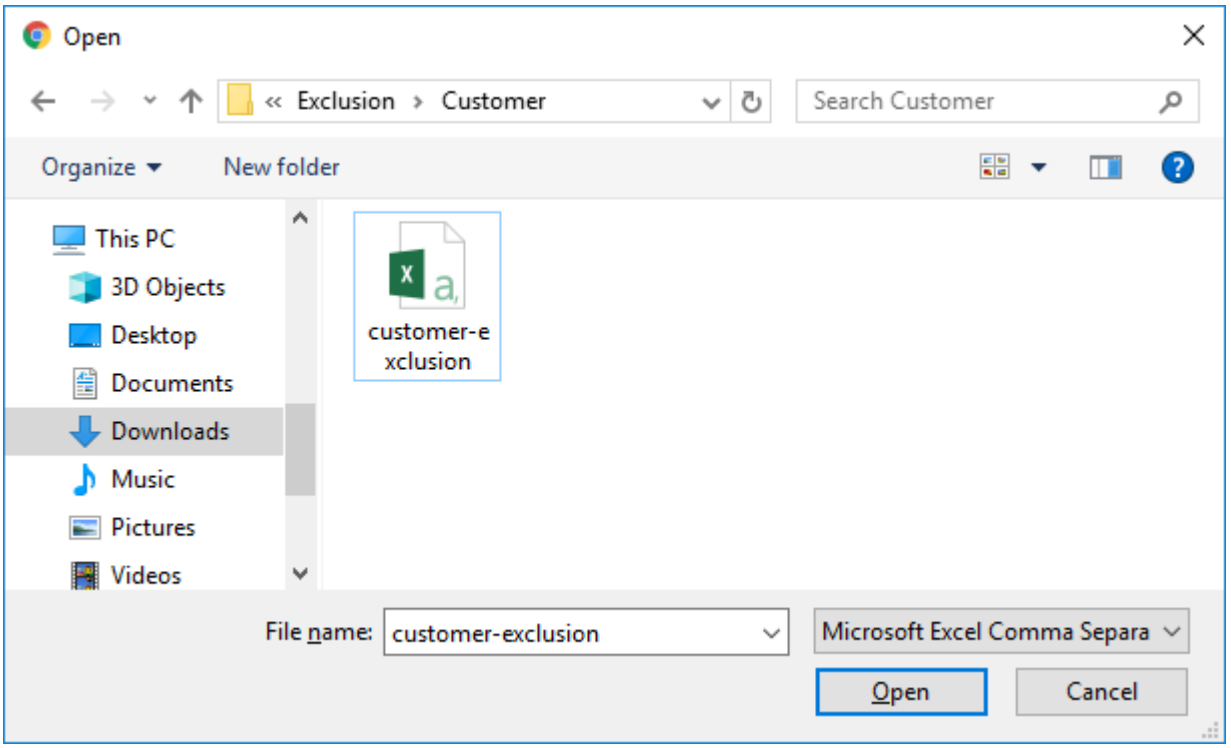


Figure: CSV File

2. Select the **Primary Field** (e.g., customer_id).
3. Confirm the mapping and click **Save**.

4. Primary Key-Based Exclusion

Allows uploading based on any **Primary-marked Table Definition field** (set by the Administrator).

For example:

- If phone1 is primary → upload phone numbers to exclude calls.
- If email is primary → upload email addresses to exclude communications.

Steps:

1. Click **Choose File** and select the CSV.
2. Select the corresponding **Primary field** (e.g., phone1).
3. Review header mapping, then click **Save**.

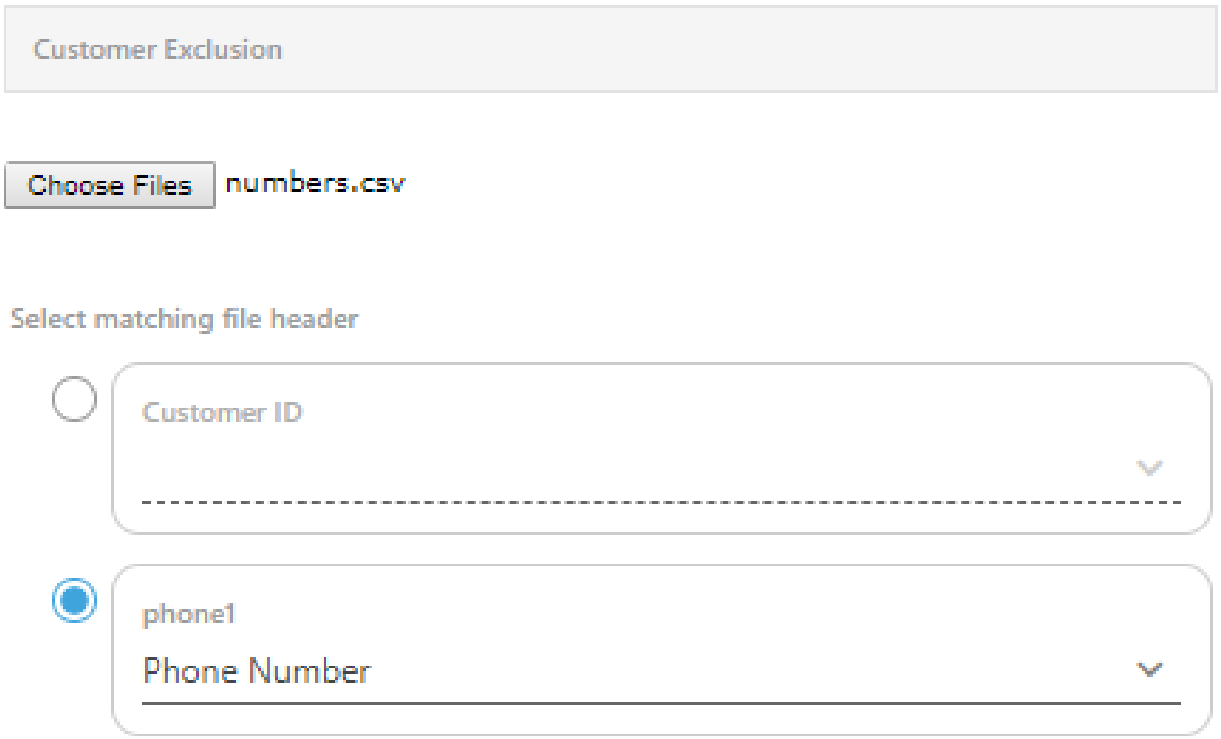


Figure: Upload CSV containing the values of Primary Table Definition field

Ameyo Preprocessor validates all uploaded data. Invalid rows are skipped and logged in an error report.

Upload Failure Handling

If an invalid file format or incorrect data is uploaded:

- The system will show an error message (only CSV files are supported).
- A summary pop-up will display:
    - Number of successfully uploaded records.
    - Number of failed records.

You can click **Download CSV** to view detailed error logs for each failed entry.

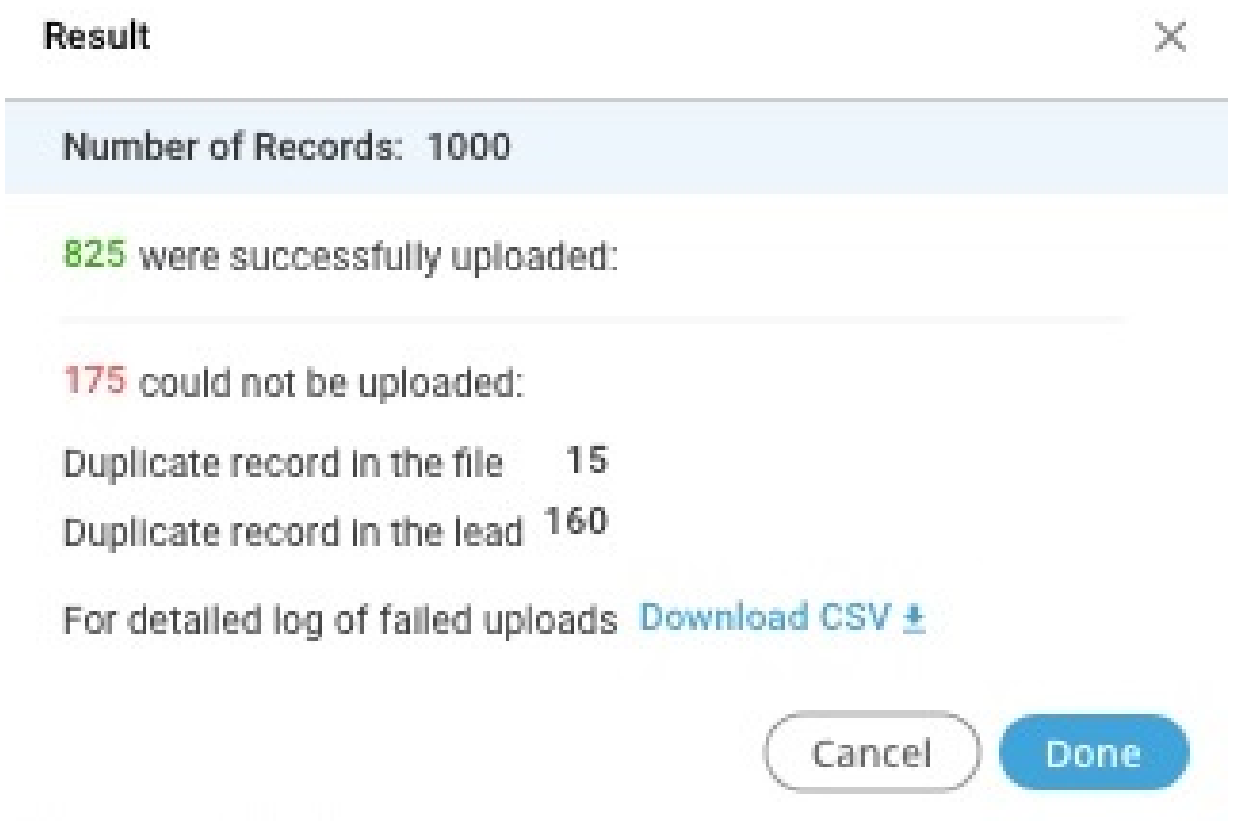
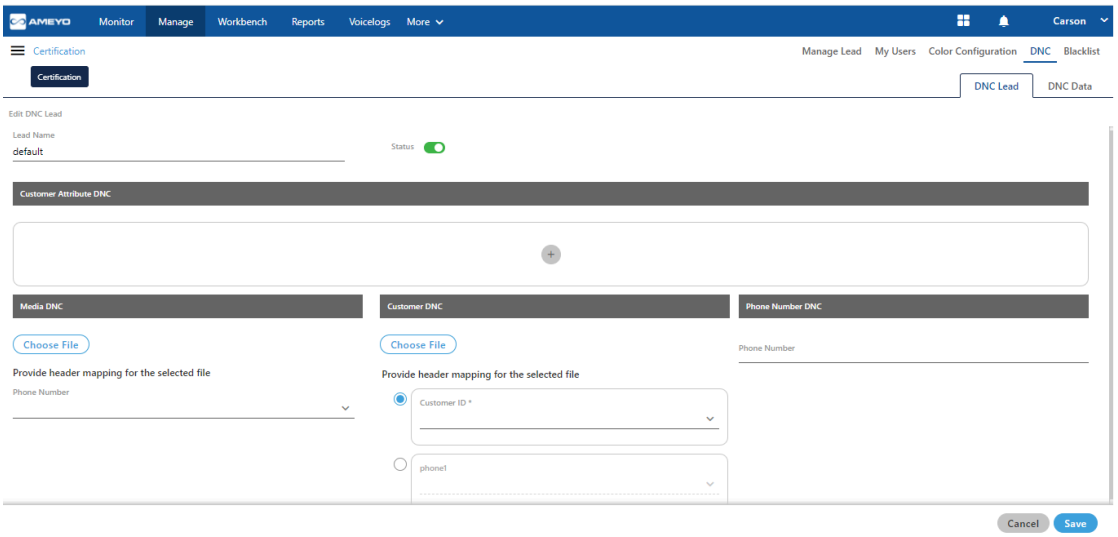
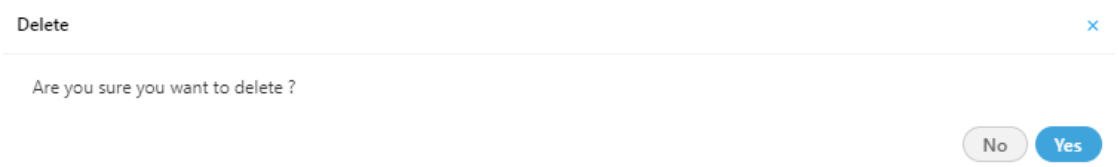


Figure: Summary of uploading the Customer Exclusion based on Primary Table Definition Field

Editing or Deleting an Exclusion

Action	Steps
Edit	Click the **Edit icon** under the *Actions* column. The same form as creation appears. You can update the name, status, or upload new CSVs.  Figure: Editing an Exclusion
Delete	Click the **Delete icon** under *Actions*. Confirm by clicking **Yes** in the pop-up. Deleted exclusions cannot be recovered.  Figure: Deleting an Exclusion

Viewing DNC Data

You can view or search existing exclusion data for any DNC lead.

Steps:

1. Click **DNC Data**.

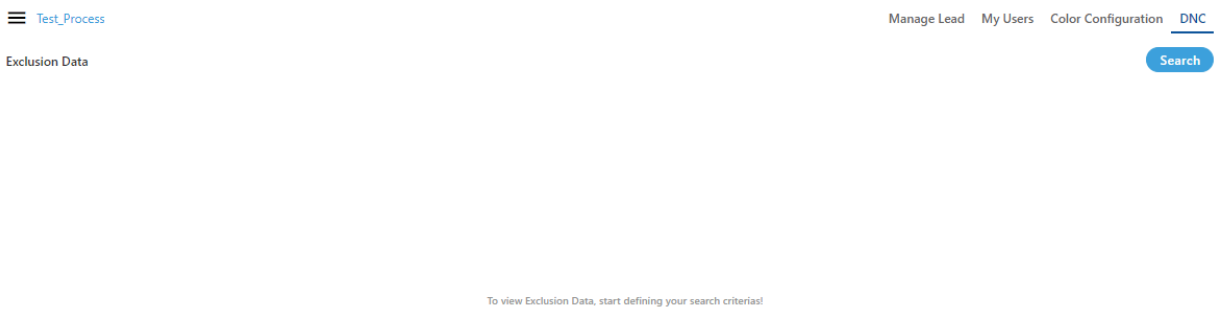


Figure: Exclusion Data

2. Click **Search** on the top-right.The **Search Exclusion Data** pop-up appears.

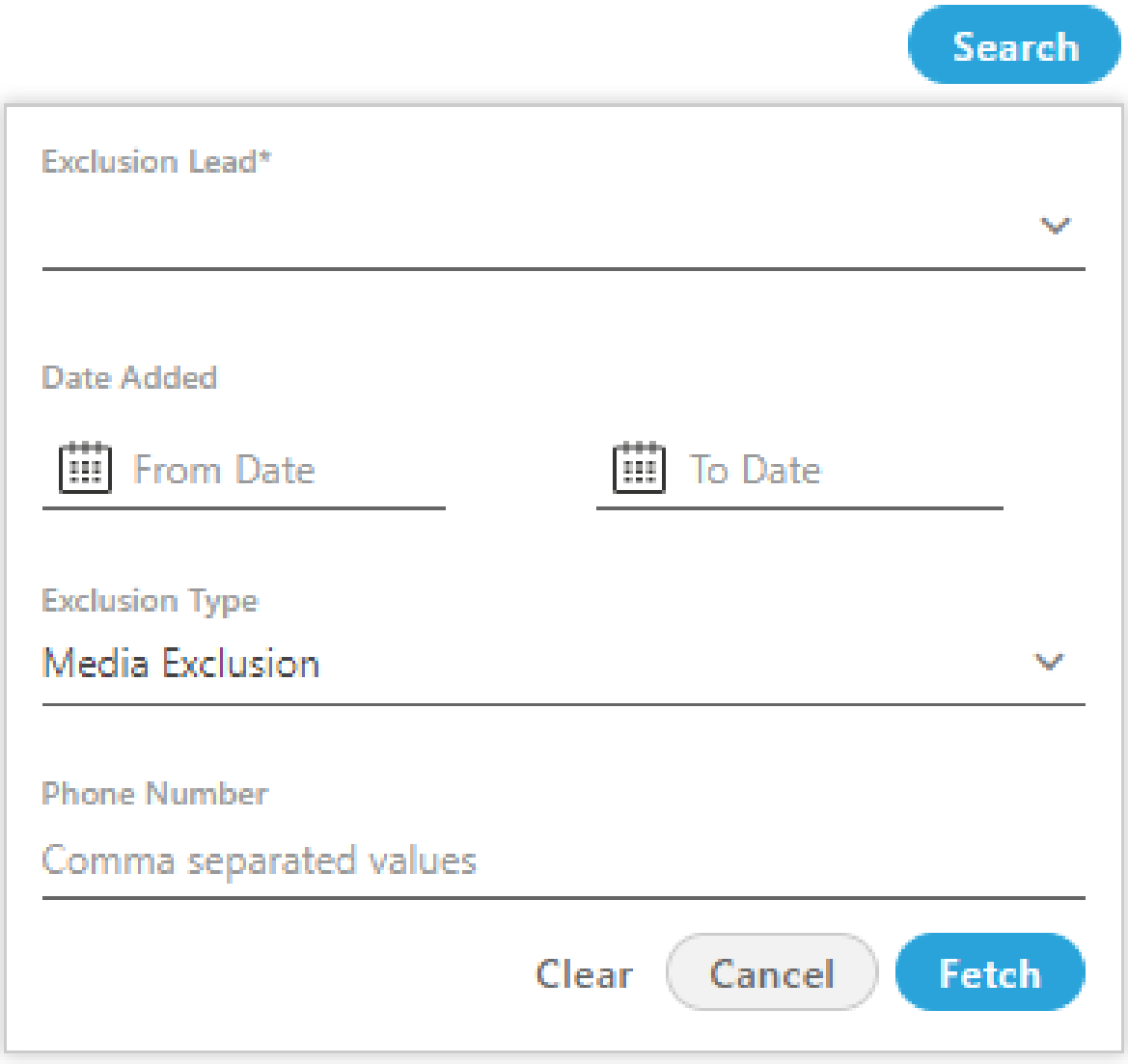


Figure: Search Exclusion Data

3. Provide:

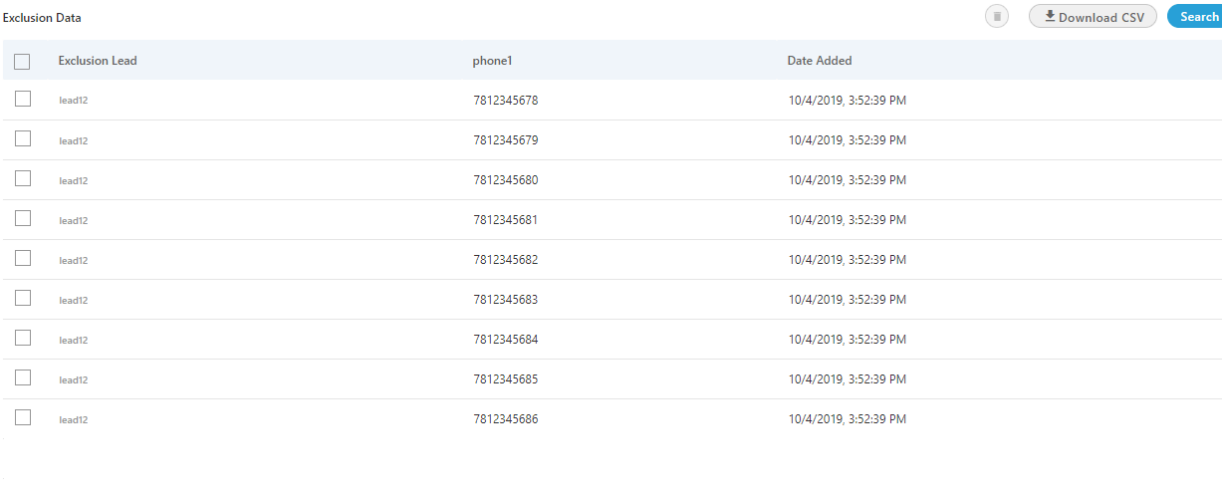
   - **DNC Lead Name** (from dropdown)

- **Date Range**
- **Type of DNC** → *Media DNC* or *Customer DNC*
- **Primary Key** value (e.g., phone number or customer ID)

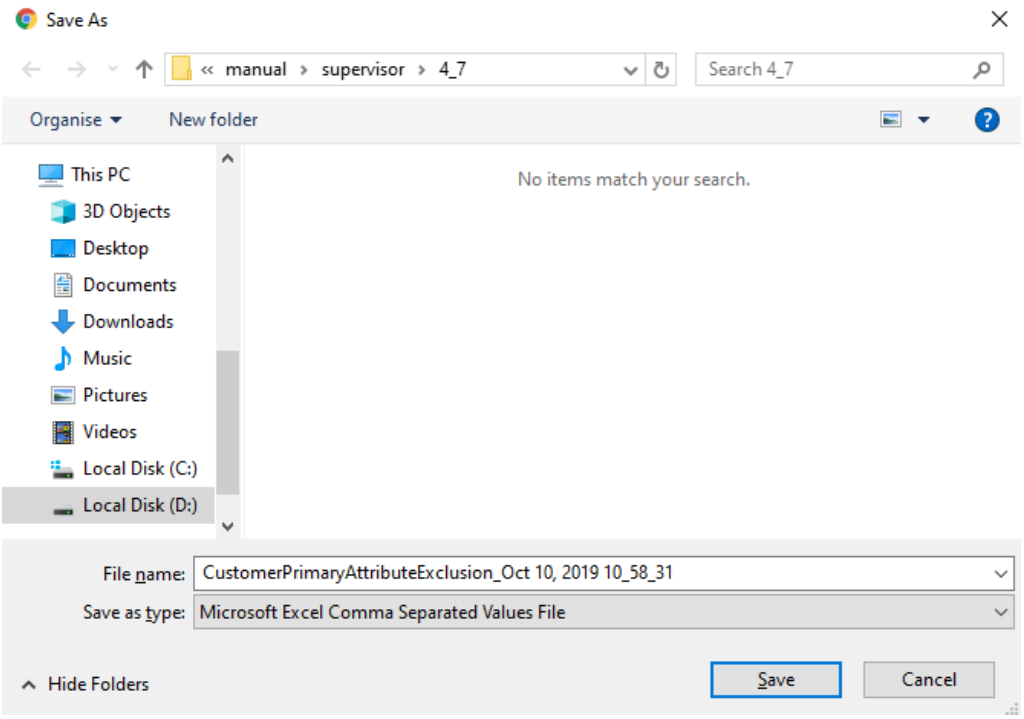
4. Click **Fetch** to display results.

The system shows up to **1000 records per page**.

To view more, navigate through the pages at the bottom.



Actions on Searched Data

Action	Description
Download CSV	Select one or more records and click **Download**. Rename the file if required, then click **Save**.  Figure: Download the List of searched Exclusions Data
Delete Data	Select records and click the **Delete icon**. Confirm deletion in the pop-up. Once deleted, records cannot be restored.  Figure: Delete the searched Exclusion Data

Summary Table

Action	Description
Create Exclusion Lead	Add a new exclusion list for phone numbers or customers.
Attribute Exclusion	Define rule-based exclusions using attributes like phone or email.
Media Exclusion	Upload a CSV file containing phone numbers to exclude.
Customer Exclusion	Upload a CSV file containing customer IDs to exclude.
Primary Key Exclusion	Upload exclusions based on the process's Primary Field.
Edit / Delete Exclusion	Modify or remove existing exclusion lists.
DNC Data Search	View and search exclusion data by lead, date, and type.
Download Exclusion Data	Export selected exclusion data in CSV format.
Delete Exclusion Data	Permanently remove selected exclusion records.

19.2.3.5. Blacklist Management in Process

The **Blacklist Management** feature allows Supervisors to exclude specific customers or contact numbers from being dialed or communicated with in the Ameyo system.

Blacklisting is managed at the **process level** - meaning that when a contact is blacklisted under a process, it is restricted across all campaigns within that process.

```
Navigation Path: Sidebar → Process Settings → Blacklist

Note: Blacklisting in one process does not apply to other processes.
```

Sub-Tabs in the Blacklist Module

The **Blacklist** section contains two sub-tabs:

1. **Blacklist Lead** – Used to create or upload blacklist lists (leads).
2. **Blacklisted Data** – Used to view, search, or download existing blacklisted records.

1. Blacklist Lead

This tab allows Supervisors to create, manage, and upload lists of contacts that need to be blacklisted.

Creating a Blacklist Lead

To add a new blacklist:

1. Click **Add New**. The **Add Blacklist Lead** pop-up appears.

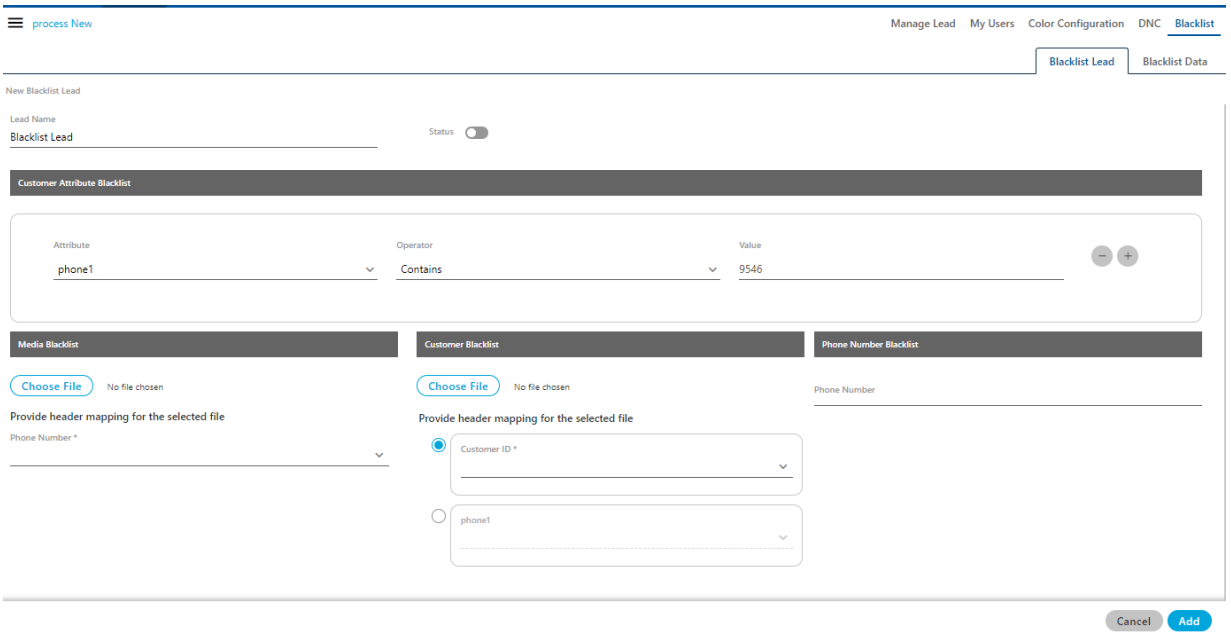


Figure: Adding BlackList Lead

2. Provide the following details:
    - **Lead Name:** Enter a descriptive name for the blacklist lead.
    - **Status:** Toggle **Enable** to activate or deactivate the blacklist.
    - **Customer Attributes (Optional):** Add one or more customer attributes (e.g., phone, email, ID) to define additional filtering conditions.
3. Choose the **Type of Blacklist**:
    - **Media Blacklist** – Upload a list of phone numbers or emails to exclude.
    - **Customer Blacklist** – Upload customer IDs to restrict those customers from communication.
    - **Phone Number Blacklist** – Upload a list of phone numbers to block directly.
4. Upload the corresponding **CSV file** containing the data for the selected blacklist type.
5. Click **Add** to create the blacklist.

After the upload is completed, the system displays a confirmation modal showing:

- Number of records successfully uploaded
- Number of failed or invalid entries

You can download the error log for detailed information if any records failed to upload.

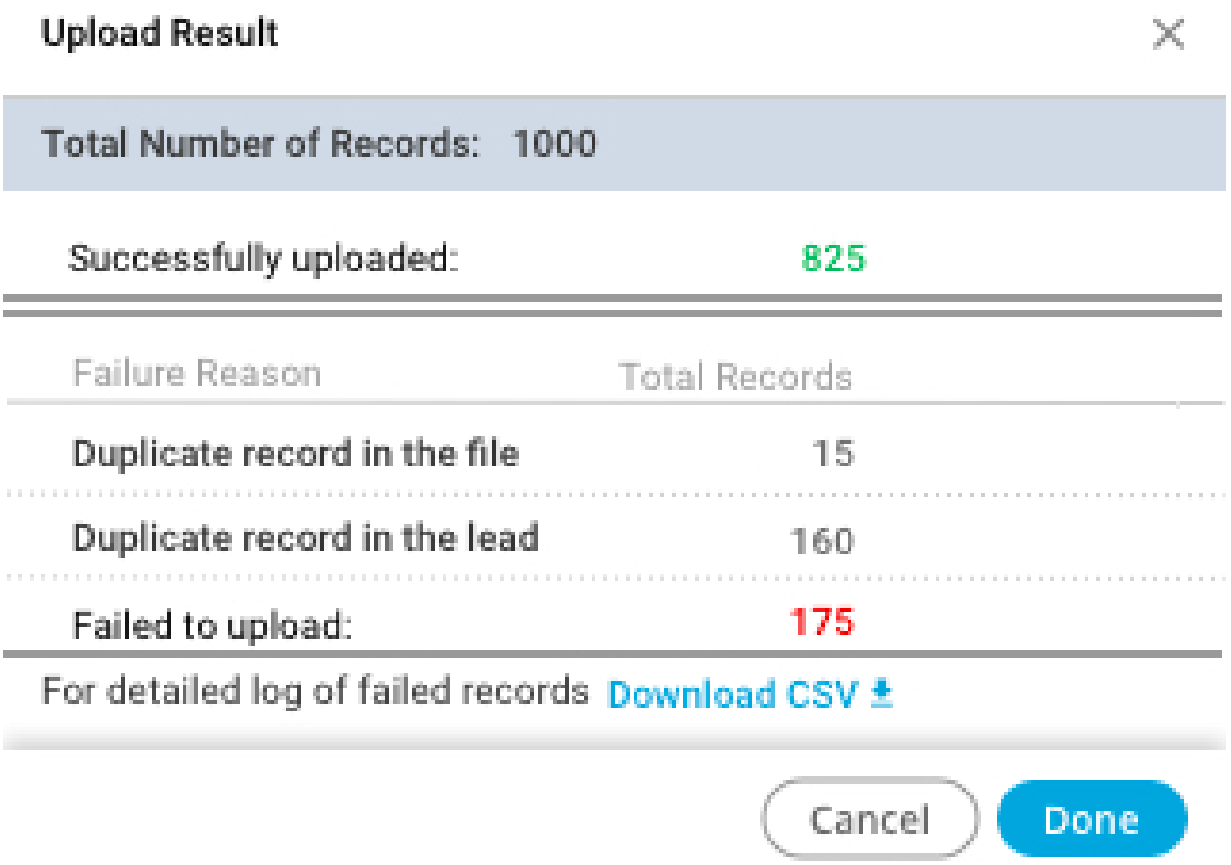


Figure: Upload Failure Modal

2. Blacklisted Data

The **Blacklisted Data** tab enables Supervisors to search, view, or fetch details of existing blacklisted records.

Steps to Search Blacklisted Data

1. Click **Search** in the **Blacklisted Data** tab.
2. In the pop-up, provide the following details:
    - **Blacklist Lead Name** – Select the lead from the drop-down list.
    - **Blacklist Type** – Choose from Media, Customer, or Phone Number blacklist.
    - **Phone Numbers** – Enter comma-separated phone numbers (if applicable).
3. Click **Fetch** to view results.

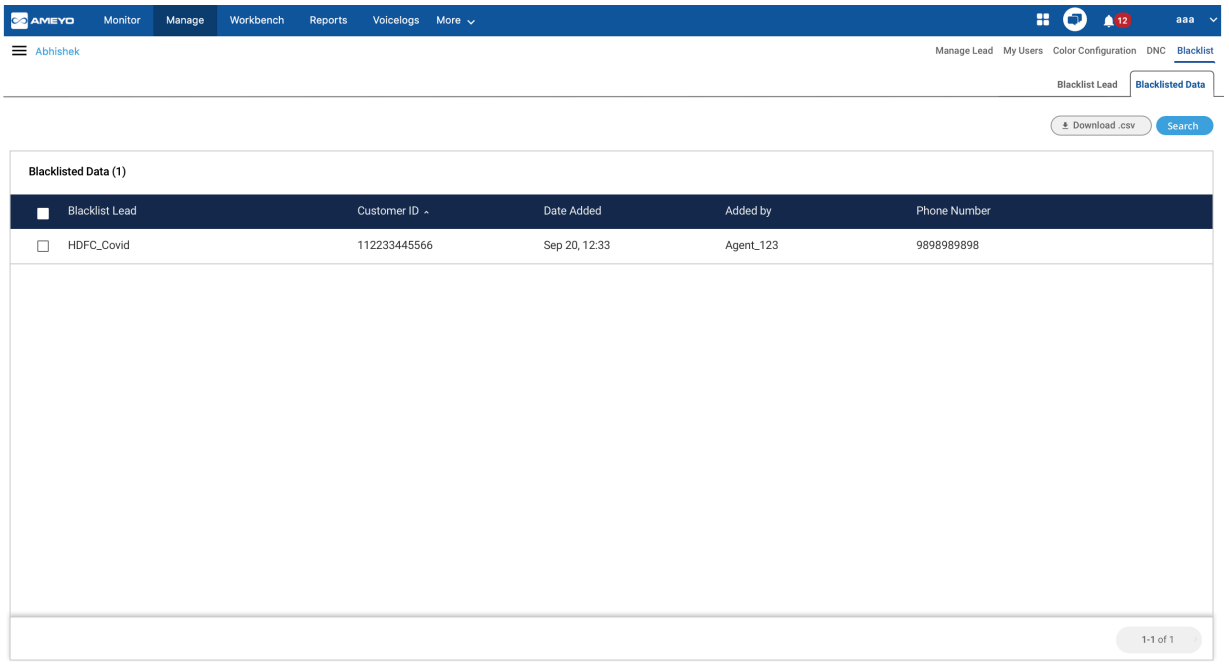


Figure: Fetching the list of Blacklisted Data

The filtered blacklist data will appear on-screen, showing all records matching the selected criteria.

Summary Table

Action	Description
Create Blacklist Lead	Add a new blacklist at the process level.
Enable/Disable Blacklist	Toggle blacklist activation status.
Add Customer Attributes	Define additional filtering attributes (optional).
Media Blacklist	Upload a CSV containing phone numbers or emails to block.
Customer Blacklist	Upload customer IDs to restrict specific customers.
Phone Number Blacklist	Upload phone numbers to block directly.
Upload CSV	Import multiple contacts into the blacklist at once.
View Blacklisted Data	Search and fetch existing blacklisted entries.
Download/Review Errors	Download the upload failure log for invalid entries.

19.2.4. Monitor Tab Introduction

The **Monitor** tab allows Supervisors to view and track real-time performance and activities across all campaigns assigned to them.

Using this interface, Supervisors can monitor agent productivity, live call status, customer interactions, and campaign-level performance metrics.

The layout and available options in this tab dynamically change depending on the **type of campaign** selected from the left navigation panel.

Interface Overview

The Monitor interface is divided into two key sections:

1. Left Navigation Section

The **Left Navigation Panel** is a fixed sidebar that displays all **Processes** and **Campaigns** assigned to the Supervisor.

- Click the **"=" (Menu)** icon to expand the sidebar.
- Click the **"X"** icon to collapse it.
- Select any assigned **Process** or **Campaign** from this panel to view its monitoring dashboard.

```
Note: The data displayed in the Monitor tab is context-sensitive and updates according to the campaign you select.
```

2. Monitoring Tab

Based on the selected campaign type, the following tabs may appear within the **Monitor** space.

These tabs allow the Supervisor to monitor different campaign categories, each offering specific insights and control options.

Tab Name	Description	Dedicated page
Monitor Chat Campaign	Displays live chat interactions, active agents, and customer chat queues for chat-based campaigns.	**Monitor Chat Campaign**
Monitor Interaction Campaign	Shows ongoing email or ticket-based interactions, agent statuses, and SLA metrics.	See **Ticketing & Asynchronous Channels**.
Monitor Inbound Campaign	Provides real-time visibility of incoming call queues, answered vs. abandoned calls, and agent availability.	**Monitor Inbound Campaign**
Monitor Outbound Campaign	Tracks outbound calling activities such as dialed, connected, and pending calls along with campaign-wise performance.	**Monitor Outbound Campaign**
Monitor Parallel Predictive Campaign	Displays predictive dialing statistics including connected calls, drop rates, pacing ratios, and system dialing behavior.	**Live Monitoring for Parallel Predictive & Voice Blast Campaigns**
Monitor Voice Blast Campaign	Monitors automated voice broadcast campaigns, showing delivery status, call completion ratios, and message reach metrics.	**Live Monitoring for Parallel Predictive & Voice Blast Campaigns**

Access path

Supervisor Console > Monitor tab

The tab itself is visible only to users whose role includes Supervisor Console access. The campaigns shown in the left navigation are limited to the processes / campaigns for which the user is an assigned Supervisor.

Privileges

The Monitor tab relies on the Supervisor **Monitor** privilege family. Key privileges (all under the `campaign:dacx-campaign.monitor.*` namespace except where noted):

Privilege key	What it enables
`dacx-campaign.monitor.telephony.view-voice-campaign-runtime`	Live voice campaign runtime (inbound and outbound Live Monitoring).
`dacx-campaign.monitor.telephony.view-user-campaign-runtime`	Per-agent runtime (Agent Monitoring).
`dacx-campaign.monitor.telephony.view-customer-campaign-runtime`	Per-customer runtime.
`dacx-campaign.monitor.telephony.view-campaign-summary` / `view-campaign-lead-summary`	Campaign / lead summary used by the Dashboards and Lead Management tabs.
`dacx-campaign.monitor.telephony.view-campaign-aq-request-runtime` / `view-campaign-aq-resource-runtime` / `view-campaign-dial-nodeflow-runtime`	Queue / dialer state visibility.
`dacx-campaign.monitor.chat-campaign`	Monitor chat campaigns.
`dacx-campaign.monitor.telephony.snoop-user-in-campaign` / `whisper-user-in-campaign`	Snoop / whisper / barge live actions.
`dacx-campaign.supervisor.monitoring.get-stats-data`	Stats payload consumed by the Monitor tab.
`contactcenter:dacx-cc.agent.workbench.select-monitoring-campaigns`	Lets a supervisor / workbench user change the set of campaigns they are monitoring.

See the **Privileges & Role Permissions Reference** for the complete list and the default **Supervisor** role mapping.

Prerequisites

- Supervisor Console login (see **Supervisor Login**).
- The user's role must grant access to the Monitor tab and to the specific campaigns they need to supervise.
- Live data refresh requires the supervisor's browser session to stay active.

Break duration thresholds

Campaign-level **monitoring parameter thresholds** (per break reason) drive **row breach** styling in Live Monitoring for supervisors. The **same** duration limits can trigger an **in-app header notification** to the **agent** who exceeded the limit on their **current** break. **Break counts** (how many times an agent went on break) are shown in monitoring and reports; they do **not** use that same agent notification path. See **Agent Not Ready** for the agent-vs-supervisor summary.

Related pages

- **Supervisor Console** – Host console that contains the Monitor tab.
- **Monitor Inbound Campaign**, **Monitor Outbound Campaign**, **Monitor Chat Campaign**.
- **Queue Monitoring**, **Agent Monitoring**, **Live Call Monitoring Operations (Agent Coaching and Monitoring)**.
- **Monitoring & Coaching**.
- **Dashboard**.

19.2.4.1. Monitor Inbound Campaign

Here, Supervisor can monitor the Inbound Campaign.

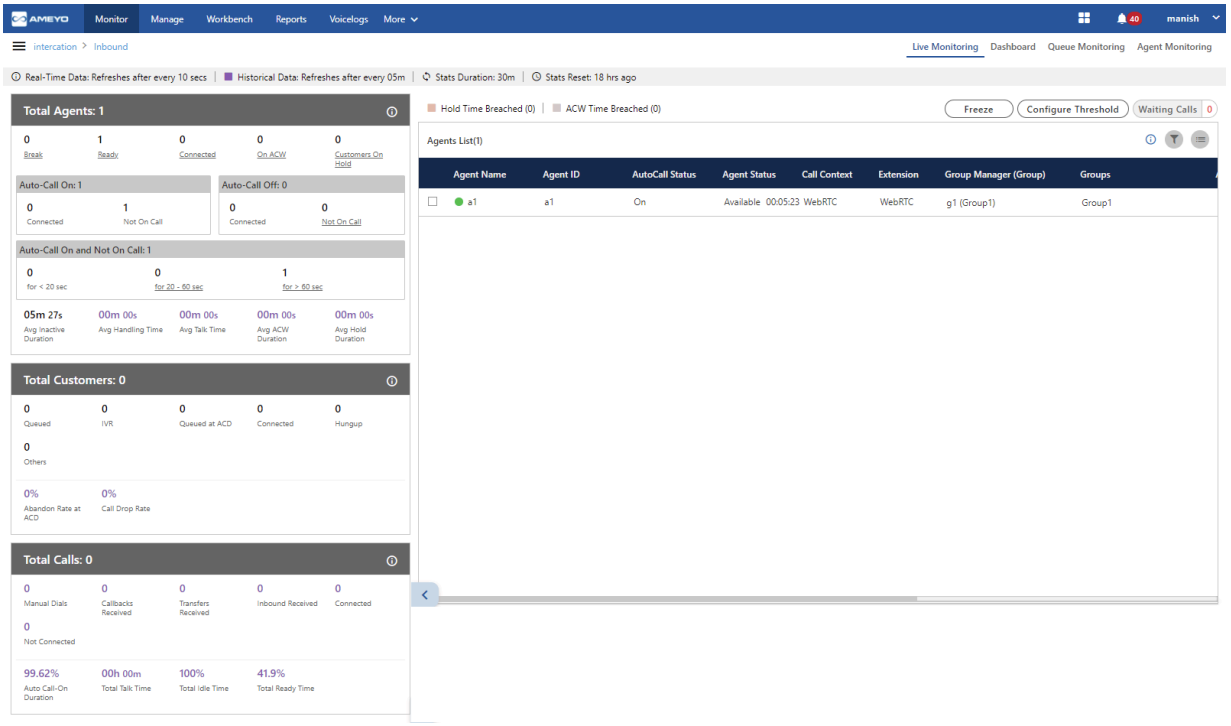


Figure: Monitor Inbound Campaign

It contains the following tabs.

- **Live Monitoring for Inbound Campaign:** Perform Live Monitoring of Inbound Campaign.
- **Dashboard for Inbound Campaign:** View Dashboard of Inbound Campaign.
- **Queue Monitoring In Inbound Campaign:** Monitor the queues.
- **Agent Monitoring in Inbound Campaign:** Monitor the agents in the campaign.

19.2.4.1.1. Dashboard for the Inbound Campaign

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

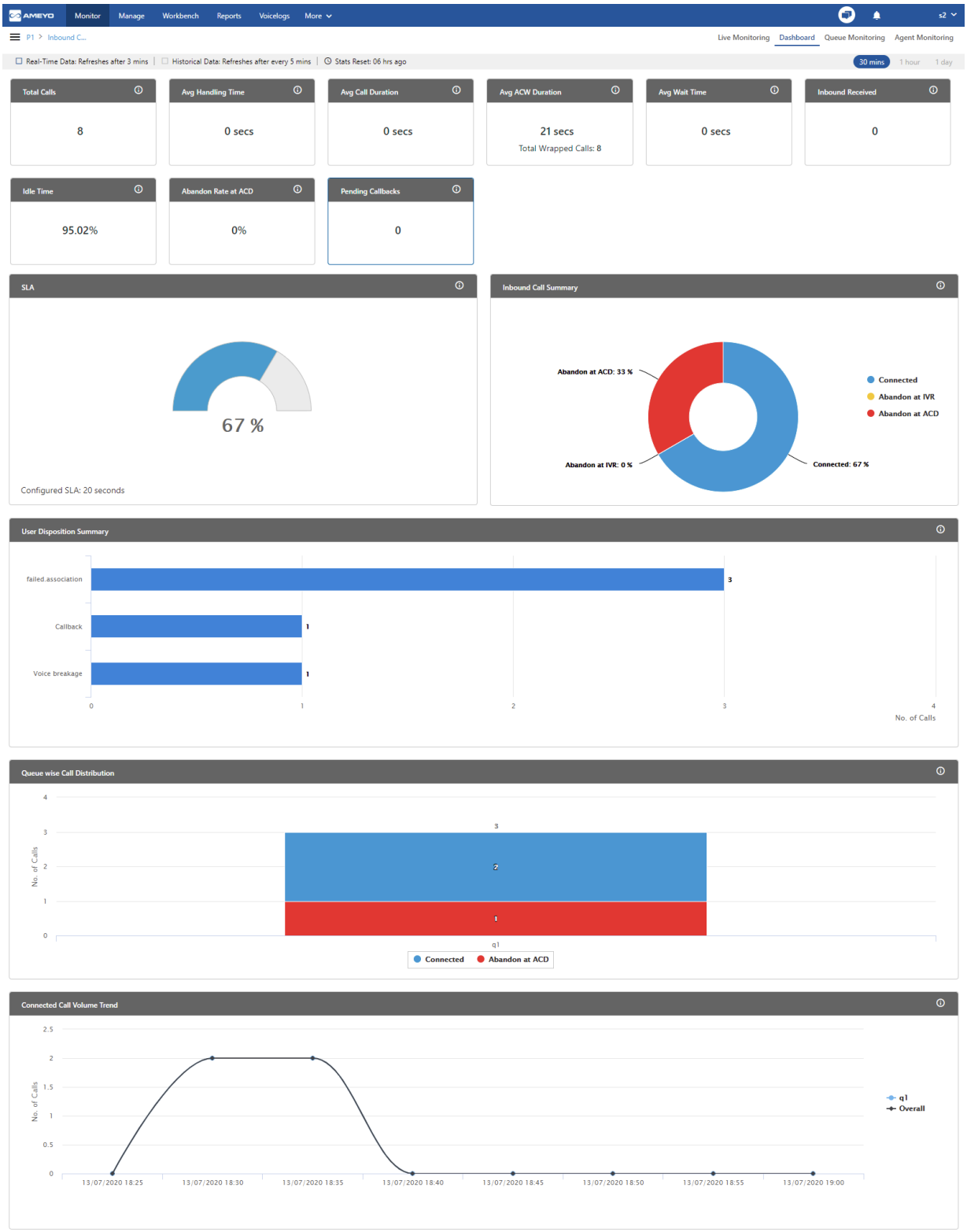


Figure: Inbound Campaign Dashboard

The dashboard tab of Outbound campaign shows the following items.

- Data Collection Indications
- Duration Tabs
- Widgets

Data Collection Indications

On top, a horizontal bar shows the indications of different data collection intervals.

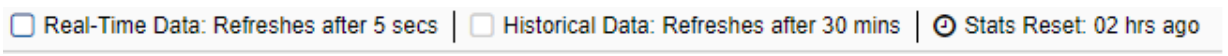


Figure: Data Collection Indications

- **Real-Time Data:** The Data Metrics, whose data is refreshed after 5 seconds, then it will be indicated with the border of blueish color .
- **Historical Data:** The Data Metrics, whose data is refreshed after every 5 minutes, then it will be indicated with the border of black color .
- **Stats Reset:** It informs the interval after which the statistics were reset last.

Duration Tabs

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

- **30 minutes:** Click to view the activities in the selected campaign for the last 30 minutes.This tab shows the data of the last 30 minutes. The Current Data on the User Interface will be updated in maximum 8 minutes, whereas the historical data will be updated in maximum 38 minutes.
- **1 hour:** Click to view the activities in the selected campaign for the last one hour.This tab shows the data of the last 1 hour. The Current Data on the User Interface will be updated in maximum 8 minutes, whereas the historical data will be updated in maximum 38 minutes.
- **1 day:** Click to view the activities in the selected campaign for the present one day starting from 00:00 hour.This tab shows the data of the last 1 day. The Current Data on the User Interface will be updated in maximum 1 hour 3 minutes, whereas the historical data will be updated in maximum 1 hour 33 minutes.

Widgets

It shows the following widgets.

Total Calls

"Total Calls" shows the total number of calls of the following call types in the campaign.

- inbound.call.dial
- outbound.auto.dial
- outbound.callback.dial
- outbound.auto.preview.dial
- outbound.manual.preview.dial
- transfer.to.campaign.dial
- outbound.manual.dial
- click.to.call.dial

Total Calls does not show any other call type.

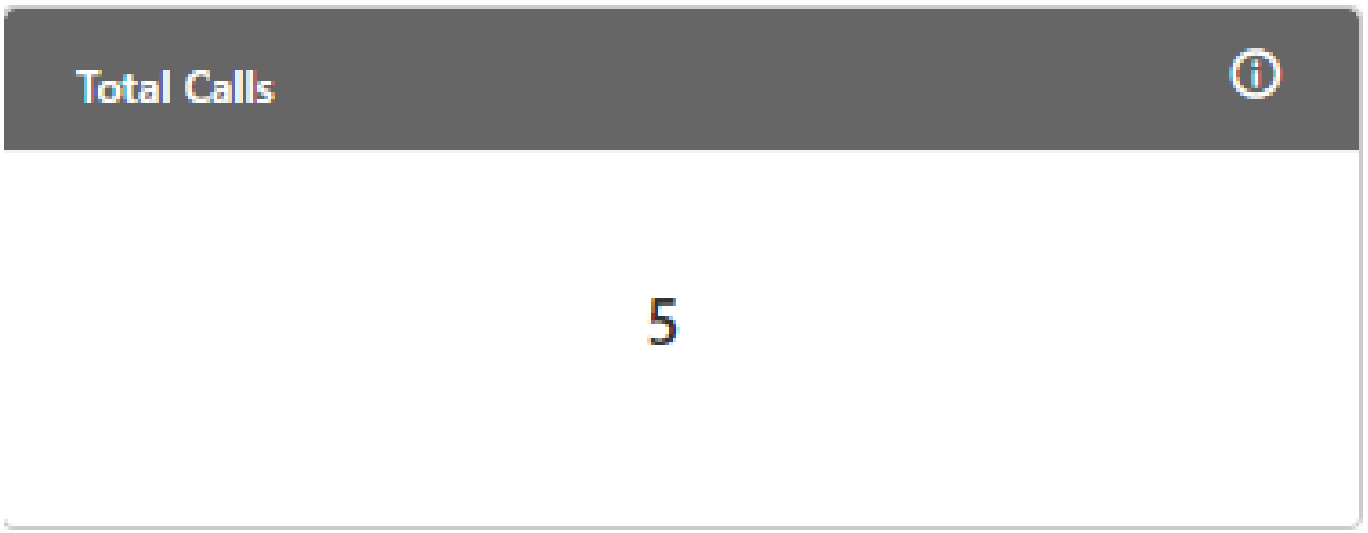


Figure: Total Calls Widget

Enumeration Example:

Suppose the following calls are connected in this campaign.

- 10 Inbound Connected Calls (which are neither transferred nor conferred) and disposed with "QUERY" disposition.
- 8 Manual Outbound Connected Calls (which are neither transferred nor conferred) and disposed with "COMPLAINT" disposition.
- 2 Inbound Calls are disconnected on IVR, which are not connected to the users.
- 1 Inbound Call is connected to user1, who transferred it to another IVR of the same campaign and then user2 of a different queue is connected. This call is auto-disposed with user.transferred.to.ivr and then user2 disposed it with "MSG" disposition.

In this case, Total Calls will be 10+8+2+1 = 21.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Total Calls".



Figure: Further Information of Total Calls

Avg Handling Time

It shows the Average Handling Time of all connected calls with users in the campaign. It is the sum of Customer Talk Time for this agent, Customer Hold Time for this agent, and Wrap Time of Connected Calls. It includes only Customer Interactions, but Dial User (Internal Calls) are not included.

$$AHT = \frac{\text{Customer Talk Time} + \text{Customer Hold Time} + \text{Wrap Time of Connected Calls}}{\text{Total Connected Calls}}$$

Figure: Calculation of Average Handling Time

> AHT does not include the Average Wrap Time of an agent as the Average Wrap Time will also include the wrapping of not connected calls.

Enumeration Example:

- Inbound Call in Campaign but not reached to ACD = 2
- 1 Inbound Call connected to user1
  - Talktime = 50,000 milliseconds
  - Hold time = 30,000 milliseconds
  - Wrap time = 20,000 milliseconds
- 1 Manual Dial Call connected to user1, who transferred it to user 2.
  - Talk time = 45,000 milliseconds (as dumped in Call History Table for this call)
  - Hold time = 30,000 milliseconds (as dumped in Call History Table for this call)
  - Wrap time of user1 = 15,000 milliseconds

- Wrap time of user2 = 18,000 milliseconds

Average Handling Time =	= {(50000+30000+20000) + (45000+30000+15000+18000)} / 2 = (1,00,000 + 1,08,000) / 2 = 2,08,000 / 2 = 1,04,000 milliseconds = 104 seconds = 1 minute 44 seconds

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Avg Handling Time".

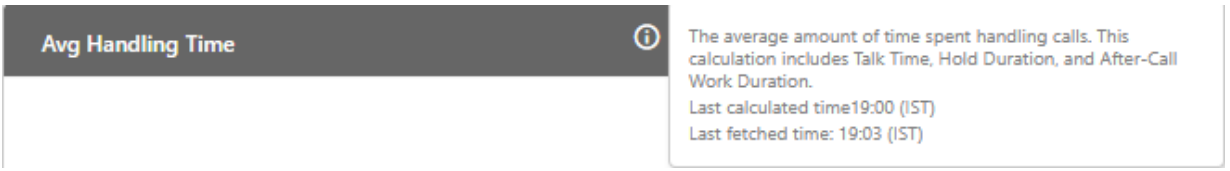


Figure: Further Information of Avg Handling Time

Avg Call Duration

It shows the Average Call Duration in a campaign.

It is equal to the total time spent on call by all agents (that is total talk time plus the total hold time of all agents) assigned in the campaign divided by the total number of calls in a campaign.

$$\text{Average Call Duration} = \frac{\text{Total Talk Time of all agents} + \text{Total Hold Time of all agents}}{\text{Count of All Calls in the Campaign}}$$

Figure: Calculation of Average Call Duration

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Avg Call Duration".



Figure: Further Information of Avg Call Duration

Enumeration Example:

1. On Call 1, Agent1 has talk time of 20 seconds on one call, out of which Agent1 has put the Customer on hold for 10 seconds.
2. On Call 2, Agent1 has talk time of 30 seconds on second call, out of which Agent has put the Customer on Hold for 15 seconds.
3. On Call 3, Supervisor has talk time of 20 seconds on one call, out of which, Supervisor has put the customer on hold for 10 seconds..
4. On Call 4, Supervisor has talk time of 30 seconds on another call, out of which, Supervisor has put the Customer on hold for 15 seconds.

Average Call Duration = [(Total Talk time of all agents) + (Total Hold Time of all agents)] / Count of all calls in Campaign

Average Call Duration = [(20+30+20+30) + (10+15+10+15)] / 4

Average Call Duration = [100 + 50] / 4

Average Call Duration = 150 / 4

Average Call Duration = 37.5

Average ACW Duration

It shows the Average ACW duration on all calls in this campaign.

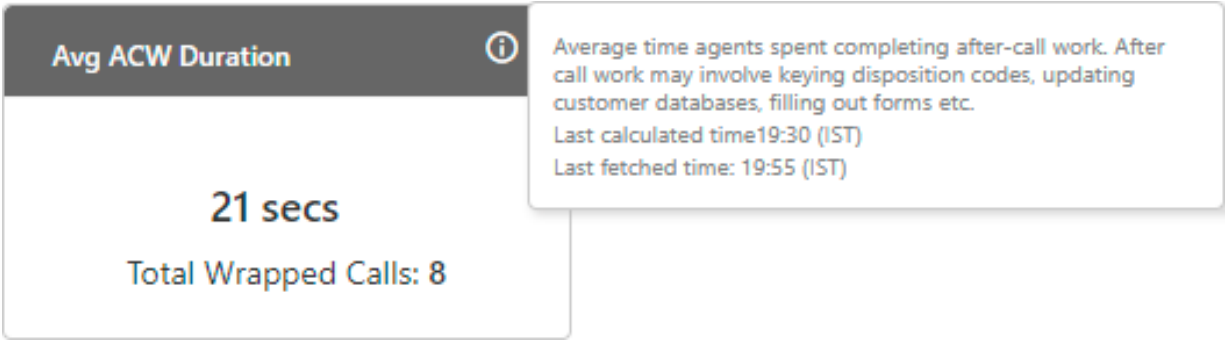


Figure: Average ACW Duration Widget

Total Wrapped Calls

It is the total number of calls wrapped up by an Ameyo User. "total_wrapped_calls" column has been added in "campaign_agent_productivity_per_interval_summary" table to make this metric available.

"Total Wrapped Calls" is displayed in the "Avg ACW Duration" box, which displays the calls wrapped by all agents in the Campaign.

Average Wait Time

It shows the Average Wait Time on all calls (including both inbound calls and transfer to campaign calls). It is equal to the total wait time divided by the count of all calls in the campaign. It will not include the Abandon at IVR Calls.

If a call has been transferred to the multiple queues, then the wait time of the last queue will be considered only.
If a call has been transferred to other campaign and it had wait time in both campaigns, then the wait time of that call will be counted in both of the campaigns.

$$\text{Average Wait Time} = \frac{\text{Total Wait Time}}{\text{Count of Total Calls in Campaign}}$$

<u>Additional Information</u>:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Average Wait Time".

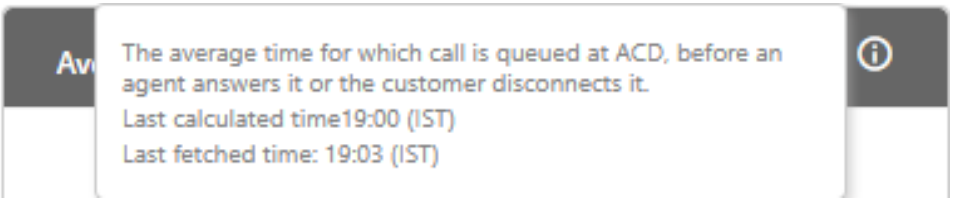


Figure: Further Information of Average Wait Time

Idle Time

It is applicable only for Single Extension in Voice. It is not available for Chat Campaign, Interaction Campaign, and Voice with Multiple Extensions.

Idle Time for an agent in a campaign	=	Ready	–	Agent Ringing Time for all calls taken by this agent in this campaign + Agent Preview Time for all calls taken by this agent in this campaign + Customer Ringing Time (in case the customer is initiated after the agent) + Customer Setup Time (in case the customer is initiated after the agent) + Agent Talk Time for all calls taken by this agent in this campaign + Agent Customer Hold Time for all calls taken by this agent in this campaign + Agent ACW Duration for all calls taken by this agent in this campaign

Idle Time will be a campaign-level metric, that is, it will be calculated differently for each campaign. If an agent have selected multiple campaigns and handling all calls in one campaign only, then its Idle Time will be equal to the Ready Duration in other campaigns.

Limitation of Multiple Extension

If the Multiple Extension license is enabled, then the Idle Time will be neither displayed in the User Interface nor included in Reports. In case of multiple license, the following disclaimer will be displayed in the Agent Productivity Summary Report.

"Feature should work on the multiple extension - data may be wrong."

Additional Information:

Hover the mouse over  icon to view the basic definition, last calculated time, and last fetch time of "Idle Time".

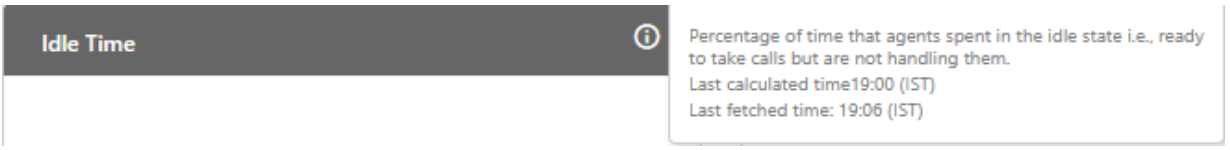


Figure: Further Information of Idle Time

Inbound Received

It shows the total number of inbound calls (disposed in all system dispositions) in the inbound campaign. For example, if a call is abandoned, it will be counted in Inbound Received Call.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Inbound Received".



Figure: Further Information of Inbound Received

Enumeration Example:

Suppose following the calls are connected in this campaign.

- 10 Inbound Connected Calls (which are neither transferred nor conferred) and disposed with "QUERY" disposition.
- 8 Manual Outbound Connected Calls (which are neither transferred nor conferred) and disposed with "COMPLAINT" disposition.
- 2 Inbound Calls are disconnected on IVR, which are not connected to the users.
- 1 Inbound Call is connected to user1, who transferred it to another IVR of the same campaign and then user2 of a different queue is connected. This call is auto-disposed with user.transferred.to.ivr and then user2 disposed it with "MSG" disposition.

In this case, the Inbound Received Calls = 10+2+1 = 13.

Abandon Rate at ACD

It shows the percentage of the abandon rate at ACD level.

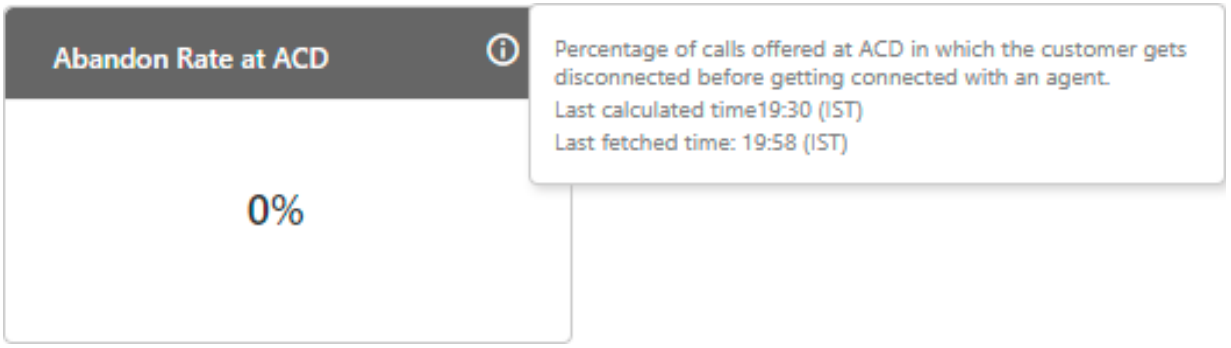


Figure: Abandon Rate at ACD

Pending Callbacks

It shows the number of callbacks pending in the selected duration tab.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Lead Penetration".

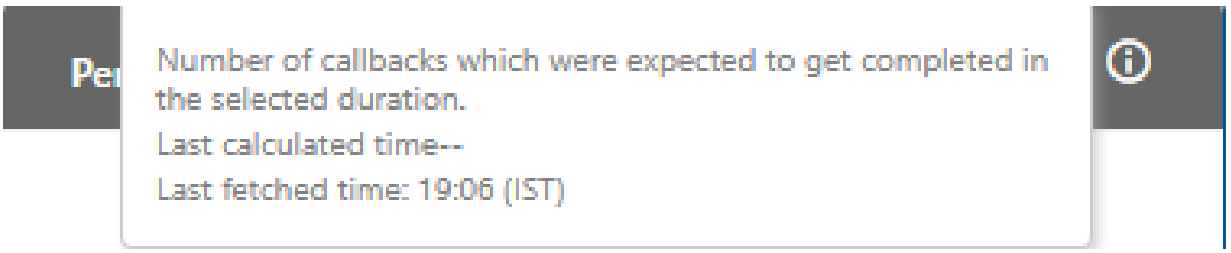


Figure: Further Information of Pending Callbacks

Abandoned Rate at ACD

It shows the abandoned rate in the campaign.

For Campaign, it is equal to the total of Abandon Calls at ringing, Abandon Calls at ACD for all assigned queues for the selected duration, and Abandon Ringing Calls divided by the total calls offered at the campaign.

Abandon Rate (%) =

$$\frac{\text{Abandoned Calls at ACD} + \text{Abandoned Calls at Ringing}}{\text{Total Offered Calls in the Campaign}} \times 100$$

Abandon rate formula

Following are the definitions of the variables used in the calculation.

Abandon at IVR: It is the count of calls that have been disconnected by the callers at the IVR. It can be because any reason such as caller is being transferred back to one or another ACD Queue repetitively. The calls that has been resolved in IVR will also be counted in "Abandon at IVR".

Abandon at ACD: It is the count of calls that have been disconnected by the agent while waiting for the agent. If a call has been transferred to multiple queues and the caller hangs up the call in the last queue, then the Abandon at ACD will be calculated in the last queue.

Abandon Ringing: It is the count of calls that have been disconnected by the customers when the agent's phone was ringing.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Abandoned Rate at ACD".



Figure: Further Information of Abandoned Rate at ACD

Enumeration Example:

- Calls reached to IVR and completed there, but not reached to ACD = 10
- Calls reached to ACD and connected within 20 seconds after reaching the ACD = 10
- Calls reached to ACD but agent disconnected on agent's phone ringing (not connected to the agent) = 5
- Calls reached to ACD but customer disconnected on agent's phone ringing (not connected to the agent) = 5

- Calls reached to ACD but waiting for agent and customer disconnected the call within 10 seconds = 10
- Calls reached to ACD and connected after 30 seconds = 5
- Calls reached to ACD but disconnected after ACD timeout of 40 seconds = 5
- Transferred to Campaign and Call reached to ACD but not connected to agent = 20
- Transferred to campaign call reached to ACD and connected to the agent within 20 seconds = 30

Total Inbound Calls = 10 (Point 2) + 30 (Point 9) + 5 (Point 6) = 45

Total Abandon Calls at Ringing = 5 (Point 3) + 5 (Point 4) + 10 (Point 5) = 20

Total Abandon Calls at ACD = 5 (Point 7) + 20 (Point 8) = 25

Total Abandon Calls at IVR = 10 (Point 1)

Abandon Rate = {(Abandon Calls at IVR + Abandon Calls at ACD + Abandon Ringing Calls) / (Inbound Calls in Campaign + Calls Transferred to Other Campaign)} * 100

Abandon Rate = {(10 + 25 + 20) / (45 + 20 + 25)} * 100 = (55 / 90) * 100 = 0.61 * 100 = 61

User Disposition Summary

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

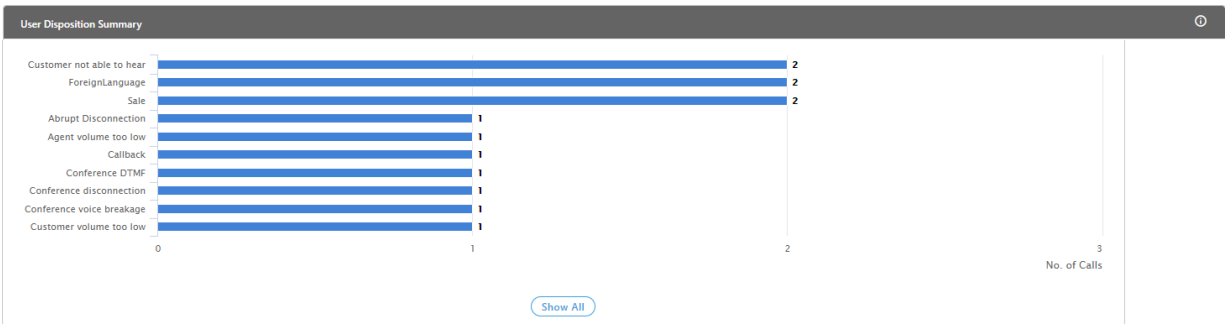


Figure: User Disposition Summary Graph

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 upto 5 user disposition names in which the highest number of calls are disposed by agents among all selected campaigns.

On hovering the mouse cursor on the bars of the dispositions, it shows the disposition method, total number of calls and total number of calls received after being transferred from another campaigns.

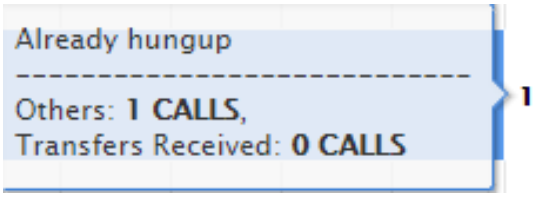


Figure: Disposition Graph

If there are more than 10 dispositions, then "Show ALL" button will appear in the graph. Click this button to see all the user dispositions. After clicking "Show All" button, the following wizard is displayed.

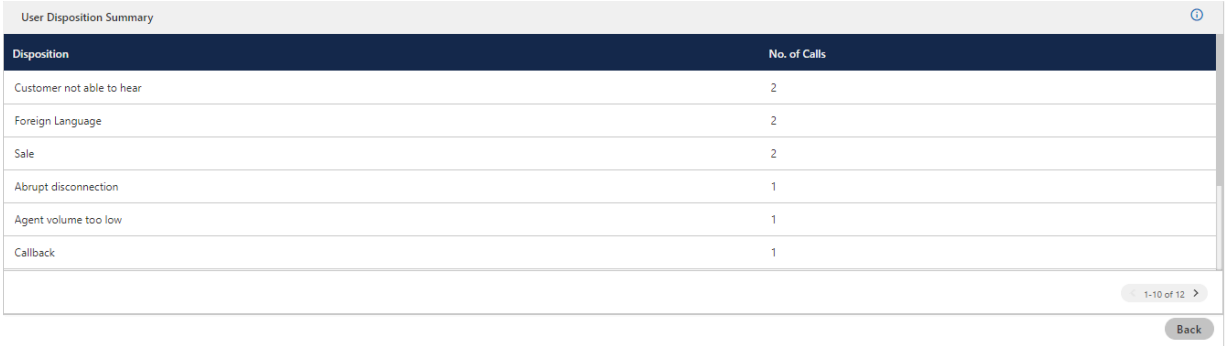


Figure: Disposition Graph List

The supervisor has to click > icon in 1-10 of 11 to see the next page of the user dispositions.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "User Disposition Summary".



Figure: Further Information of User Disposition Summary

Enumeration Example:

Suppose the following calls are connected in this campaign.

- 10 Inbound Connected Calls (which are neither transferred nor conferred) and disposed with "QUERY" disposition.
- 8 Manual Outbound Connected Calls (which are neither transferred nor conferred) and disposed with "COMPLAINT" disposition.
- 2 Inbound Calls are disconnected on IVR, which are not connected to the users.
- 1 Inbound Call is connected to user1, who transferred it to another IVR of the same campaign and then user2 of a different queue is connected. This call is auto-disposed with user.transferred.to.ivr and then user2 disposed it with "MSG" disposition.

Now, it shows the following dispositions and counts.

QUERY - 10

COMPLAINT - 8

user.transferred.to.ivr - 1

MSG - 1

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.

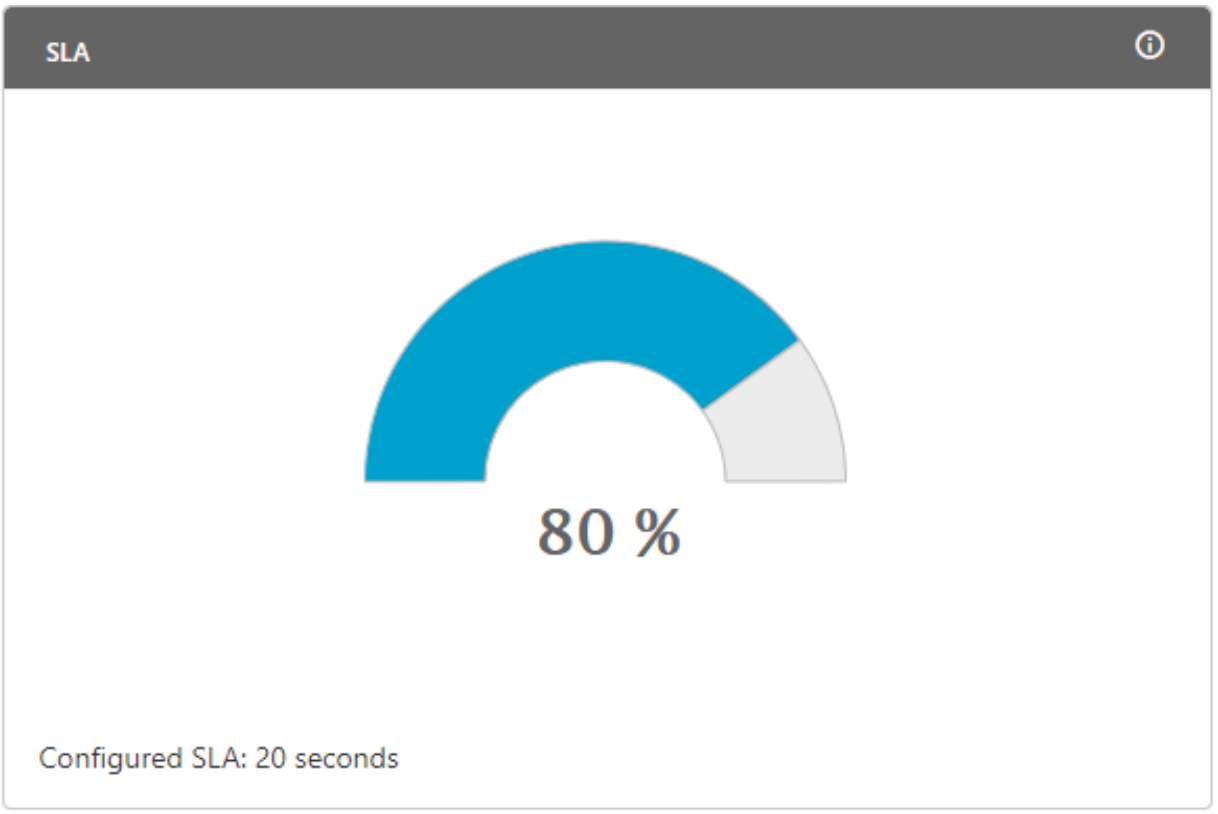


Figure: SLA Chart

At the bottom, you can see the SLA Threshold defined by the Administrator in the Campaign Settings. Here it is 20 seconds.

SLA Calculation:

$$SLA = \frac{\text{Total Connected Calls with Threshold}}{\text{Total Received Calls}} \text{ X } 100$$

Figure: Calculation of SLA

$$SLA = \frac{\text{Total Connected Calls with Threshold}}{\text{Total Connected Calls + Total Abandon Calls at ACD + Total Abandon Calls at Ringing}} \text{ X } 100$$

Figure: Detailed Calculation of SLA

Definitions:

Following are the definitions of metrics used in the above calculation.

- **Threshold:** The default threshold is 20 seconds but the administrator can change it in the Administrator Console.
- **ACD:** It is a standard term that means Automatic Call Distributor, which is a sophisticated system to answer and route inbound calls to the user-defined agents

automatically.

- **Total Received Calls:** It is the sum of Total Answered Calls (sum of all Inbound Calls and Transfer to Campaign calls), Total Abandon Calls at ACD, and Total Abandon at Ringing Calls.

$$\text{Total Received Calls} = \text{Total Connected Calls} + \text{Total Abandon Calls at ACD} + \text{Total Abandon Calls at Ringing}$$

Figure: Calculation of Total Received Calls

- **Total Answered Calls:** It is the total number of calls answered by the Agents including both Inbound Calls and Transfer to Campaign calls.
- **Total Abandon Calls at ACD:** It is the total number of calls that are disconnected by the customer while waiting for the agent.
- **Total Abandon Ringing Calls:** It is the total number of calls that are disconnected when the phone of the agent (assigned to that call) is ringing.

Special Cases:

- Short calls (customer talk time <10 sec) are considered in Abandon calls at ACD as well in Connected calls.
- Cumulative wait time is considered in the campaign for re-ACD cases. For example, if the call is routed to different queue on timeout(when all the staffed agents are busy handling the calls) then the wait time calculated is the sum of the wait time of all the queues via which the call is routed.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "SLA".



Figure: Further Information of SLA

Enumeration Example:

- Calls reached to IVR and completed there, but not reached to ACD = 10

- Calls reached to ACD and connected within 20 seconds after reaching the ACD = 10
- Calls reached to ACD but agent disconnected on agent's phone ringing (not connected to agent) = 5
- Calls reached to ACD but customer disconnected on agent's phone ringing (not connected to agent) = 5
- Calls reached to ACD but waiting for agent and customer disconnected the call within 10 seconds = 10
- Calls reached to ACD and connected after 30 seconds = 5
- Calls reached to ACD but disconnected after ACD timeout of 40 seconds = 5
- Transferred to Campaign and Call reached to ACD but not connected to agent = 20
- Transferred to campaign call reached to ACD and connected to agent within 20 seconds = 30

Now, only those calls will be counted in the SLA Calculation that has been reached to ACD.

Total Connected Calls in Threshold = 10 (Point 2) + 30 (Point 9) = 40

Total Connected Calls = 10 (Point 2) + 30 (Point 9) + 5 (Point 6) = 45

Total Abandon Calls at Ringing = 5 (Point 3) + 5 (Point 4) + 10 (Point 5) = 20

Total Abandon Calls at ACD = 5 (Point 7) + 20 (Point 8) = 25

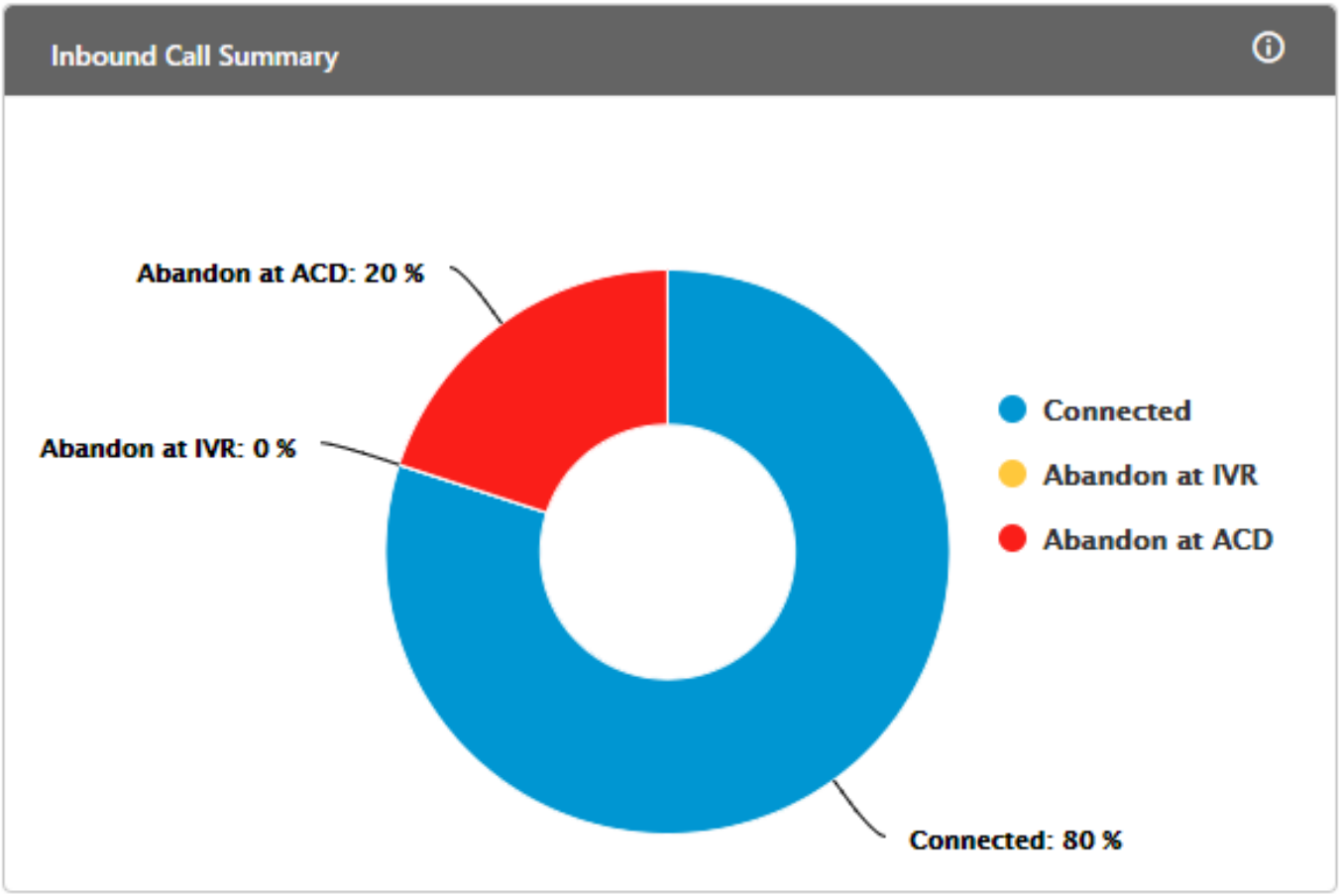
SLA% = {Total Connected Calls in Threshold / (Total Connected Calls + Total Abandon Calls at Ringing + Total Abandon Calls at ACD)}*100

SLA% = {40 / (45 + 20 + 25)} * 100

SLA% = (40 / 90) * 100 = 400 / 9 = 44.44

Inbound Call Summary

Dough nut pie chart shows the overall call distribution (in percentage) in the inbound campaign disposed with different system dispositions. It is equal to the sum of number of connected calls, number of missed calls, and number of abandoned calls.



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

$$\text{Overall Call Distribution} = \text{Number of Connected Calls} + \text{Number of Missed Calls} + \text{Number of Abandoned Calls}$$

Figure: Calculation of Overall Call Distribution

Following is the definition of the variables used in the calculation.

Number of Connected Calls: It is the total number of calls that are connected to the agent.

Number of Missed Calls: It is the total number of calls that are missed.

Number of Abandoned Calls: It is the total number of abandoned calls, which were abandoned at IVR, ACD, and ringing.

$$\text{Abandoned calls} = \text{Abandoned Calls at IVR} + \text{Abandoned Calls at ACD} + \text{Abandoned Calls at Ringing}$$

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Inbound Call Summary".

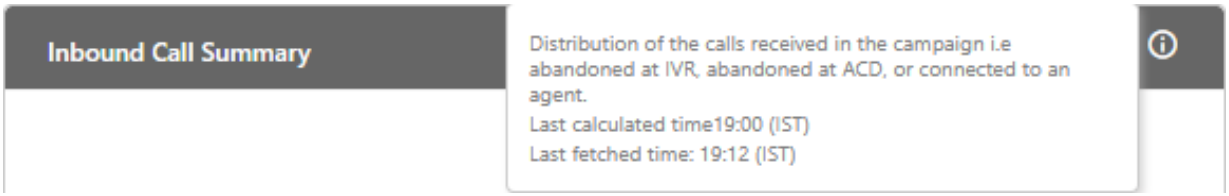


Figure: Further Information of Inbound Call Summary

Queue-wise Call Distribution

This graph highlights the queue-wise distribution of calls. Each column represents a queue, which shows the count of missed calls, abandoned calls and connected calls in that queue.

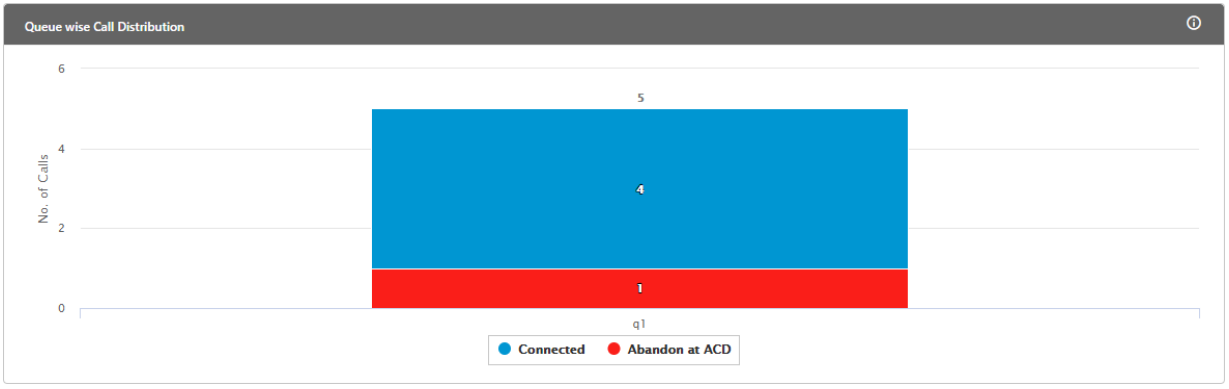


Figure: Call Distributions

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.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Queue-wise Call Distribution".

19.2.4.1.2. Live Monitoring of Inbound Campaign

This dashboard allows Supervisors to track Inbound Campaign activity. The interface is organized into specific sections for alerts, data timelines, and summary metrics.

1. Cautionary Extension Selection Alert

A **Red Cautionary Bar** may appear at the top of the screen upon login.

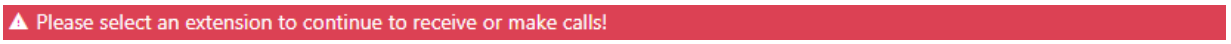


Figure: Cautionary Mark

- **Trigger:** This indicates that the Supervisor has not yet selected a phone extension.
- **Action:** Click directly on the red bar or the extension dropdown to select your active extension. Once selected, the warning disappears.

2. Data Collection Indicators

Starting from version 4.13.33, the dashboard refresh interval is configurable via the `liveMonitoringRefreshTimerMs` parameter in `server_preference_store` at the campaign level. Accepted values range from **4000 ms** (4 seconds) to **10000 ms** (10 seconds); the default is **10000 ms**. Lowering the value provides more responsive data at the cost of slightly higher server load.

The dashboard uses specific font colors and labels to indicate how frequently the displayed data is updated.

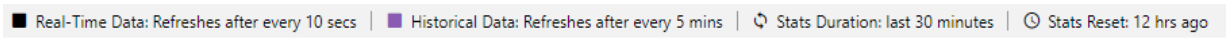


Figure: Data Collection Indications

- ***Real-Time Data:*** The statistics which are given in the black font color will update its data in every 10seconds. . Generally, the data shown in this color has a real-time impact on the database like Agent's activity.
- ***Historical Data:*** The statistics which are in the Purple font color refreshes after every 5minutes. Generally, the data shown in this color do not impact the database in every instance of the database.

- ***Stats Duration***: It shows that the data showing on the monitor screen is of the last 30 minutes.
- ***Stats Reset***: It is the indication about the time before which the monitoring data was refreshed.

3.Campaign & Agent Runtime Summaries

The Live Monitoring dashboard provides detailed runtime summaries for both overall Campaign performance ("**Total Calls**") and Agent status ("**Total Agents**").

1. Campaign Runtime Summary (Total Calls)

The **Total Calls** section provides a snapshot of the specific Inbound Campaign's performance for the current runtime session.

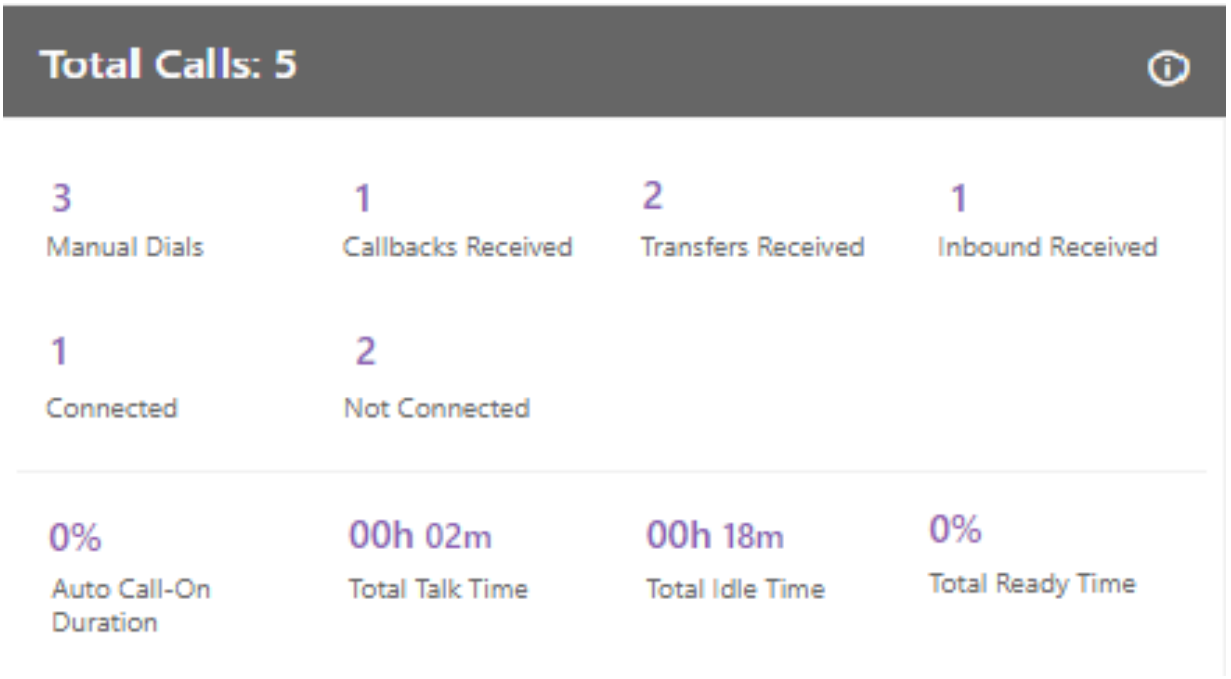


Figure: Campaign Runtime Summary

Viewing Data Timestamps (Additional Information)

Hover your mouse over the **Information Icon** (usually represented by an i or similar symbol) next to the section header. This displays:

- **Last Calculated Time:** When the metrics were last computed by the system.
- **Last Fetched Time:** When the data was last retrieved for display.



Figure: Further Information of Total Calls

Available Metrics

The dashboard tracks the following metrics:

```
Note: These statistics refresh every 5 to 10 seconds on the user interface.
```

Call Volume Counters:

- **Manual Dials:** Total manual and manual-preview calls. It shows the data of the last 30 minutes.
- **Callbacks Received:** Aggregated count of Queue, Campaign, Self, and Preview callbacks. It shows the data of the last 30 minutes.
- **Transfers Received:** Total calls transferred into the campaign. It shows the data of the last 30 minutes.
- **Inbound Received:** Total incoming calls received. It shows the data of the last 30 minutes. It shows the data of the last 30 minutes.
- **Connected / Not Connected:** Count of calls answered by customers vs. those that failed to connect. It shows the data of the last 30 minutes.

Time & Efficiency Metrics:

- **Total Talk Time:** Cumulative time all agents have spent on calls.
- **Auto-Call On Duration %:** Percentage of time agents had "Auto-Call" enabled while in the *Ready* state.

$$\text{Auto-Call on Duration \%} = \frac{\text{Auto-Call on Duration}}{\text{Ready Duration}} \%$$

Figure: Auto-Call On Duration Percentage

- **Total Ready Time %:** Percentage of time agents were in the *Ready* state while staffed in the campaign.

$$\text{Total Ready Time \%} = \frac{\text{Ready Duration}}{\text{Staffed Duration}} \%$$

Figure: Total Ready Time Percentage

Idle Time Calculation: The **Total Idle Time %** is calculated using the following logic:

It is the percentage of Total Idle Duration divided by Total Ready Duration. Here, the Total Idle Duration is the difference between Total Ready Time and Total Service Time in a campaign.

$$\text{Idle Duration (\%)} = \frac{\text{Total Idle Duration}}{\text{Total Ready Duration}} \times 100$$

- **Total Idle Duration** = (Total Ready Time) - (Total Service Time)

2.User Runtime Summary (Total Agents)

This section provides a real-time snapshot of the current agent workforce.

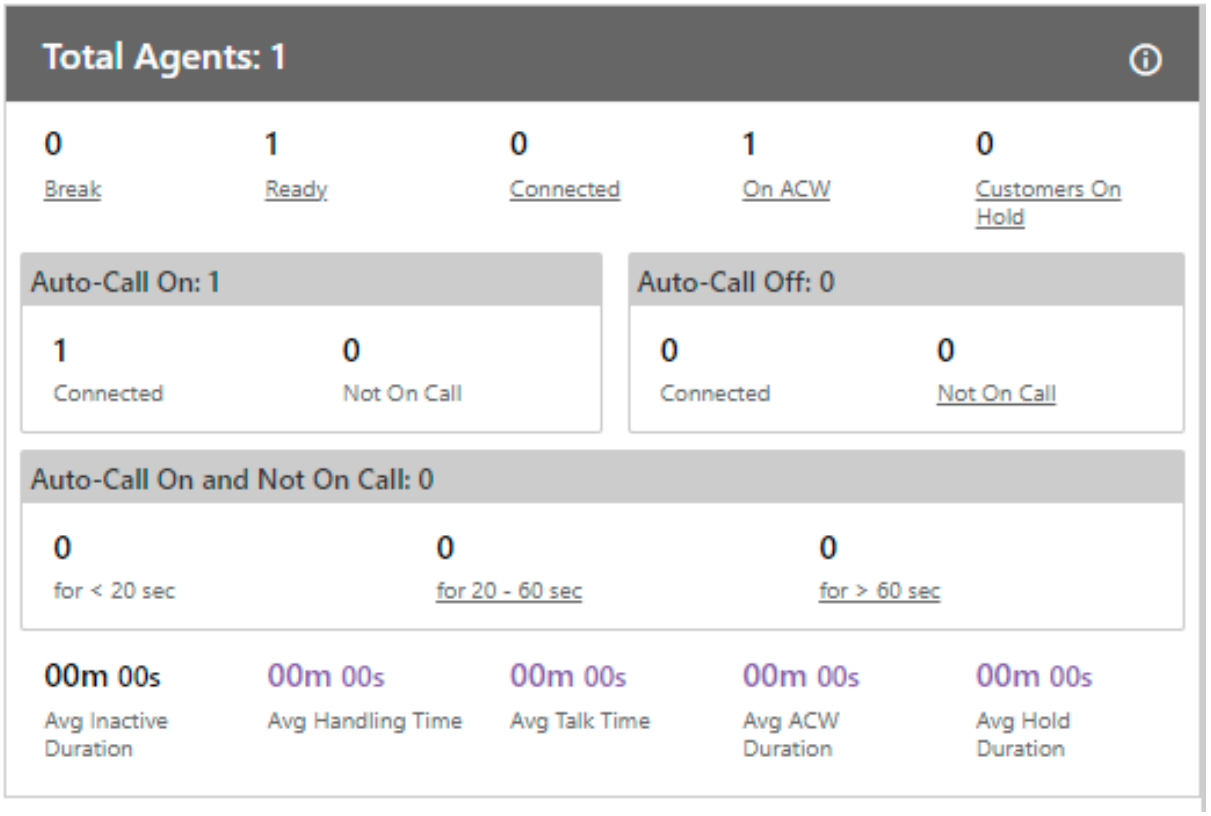


Figure: Total Agents: User Runtime Summary

Viewing Data Timestamps

Similar to the Campaign Summary, hover over the **Information Icon** to view the **Last Calculated** and **Last Fetched** timestamps for agent data.



Figure: Further Information of Total Agents

Available Metrics

This section categorizes agents by their **current** state and performance averages.

```
Note: These statistics represent Current Data and refresh every 5 to 10 seconds.
```

Agent States:

- **Break:** It is equal to the number of agents on break divided by the number of agents whose status is break in the campaign.

$$\text{Break} = \frac{\text{Number of Agents on Break}}{\text{Number of agents whose status is break}}$$

  Certain metrics in this view are interactive. **Example:** Clicking on the **Break** wizard/metric will automatically activate the dashboard filter group. The **Agent List** below will update to show only the agents currently matching that parameter (e.g., only agents on Break).

- **Ready:** It is the number of unique agents staffed in the campaign, who are on "Available" status. It is a click-able entity. Once you click on "Ready" wizard, the filter group of the dashboard page activates and the Agent list comes up according to the selected parameters.
- **Connected:** It is the number of agents who are connected to calls in the campaign.It is a click-able entity. Once you click on "Connected" wizard, the filter group of the dashboard page activates and the Agent list comes up according to the selected parameters.
- **On ACW:** Agents in After Call Work.
- **Auto-Call On / Off:** "Auto-Call On and Not on Call" are the number of agents whose Auto Call status is On but they are not on any call. It includes an agent only when its status is set as "Auto-Call On" and "Available".

  Example: It includes only the current status for all the calculations, that is, if the user (with "Available" and "Auto-Call On" status) is not getting a call from last 60 seconds, and it switched to break for 5 seconds, then after coming back from break, that agent will be seen inactive in "<20sec" field, the last 60 seconds is lost. The count will decrease when the agent selects any break or sets its Auto-Call status as "OFF." The count will

increase when the agent selects available after coming from any break or sets its Auto-Call Status as "ON."

It shows the inactive agents in the following intervals.

- **<20 sec:** It is the total number of agents who are on "Auto-Call On" status and waiting for the calls for less than 20 seconds.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.
- **20-60 sec:** It is the total number of agents who are on "Auto-Call On" status and waiting for the calls from the last 20 to 60 seconds.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.
- **>60 sec:** It is the total number of agents who are on "Auto-Call On" status and waiting for the calls for more than 60 seconds.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.

Avg Inactive Duration

It is the average of all inactive duration of the agents staffed in the campaign.

It shows the current data. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.

Avg Handling Time

It is equal to the sum of Customer Talk Time, Customer Hold Time, and Wrap Time of Connected Calls divided by the total connected calls. It includes only Customer Interactions, but Dial User (Internal Calls) are not included.

$$AHT = \frac{\text{Customer Talk Time} + \text{Customer Hold Time} + \text{Wrap Time of Connected Calls}}{\text{Total Connected Calls}}$$

Figure: Calculation of Avg Handling Time

> AHT does not include the Average Wrap Time of an agent as the Average Wrap Time will also include the wrapping up of not connected calls.

It shows the data of the last 30 minutes. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.

Avg Talk Time

It is equal to the total time (in seconds) spent by the agents while talking to the customers divided by the total number of answered customer calls in this campaign.

$$\text{Average Talk Time} = \frac{\text{Total Time Spent by Agents while Talking to Customer (In Seconds)}}{\text{Total Answered Calls}}$$

Figure: Calculation of Avg Talk Time Duration

It shows the data of the last 30 minutes. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.

Avg ACW Duration

It is the average amount of time spent by all the agents in disposing the calls.It represents the average time taken by the Agents to dispose the calls.

It shows the data of the last 30 minutes. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.

Avg Hold Duration

It is equal to the total hold time divided by the count of customer calls with holds.

Calculation:

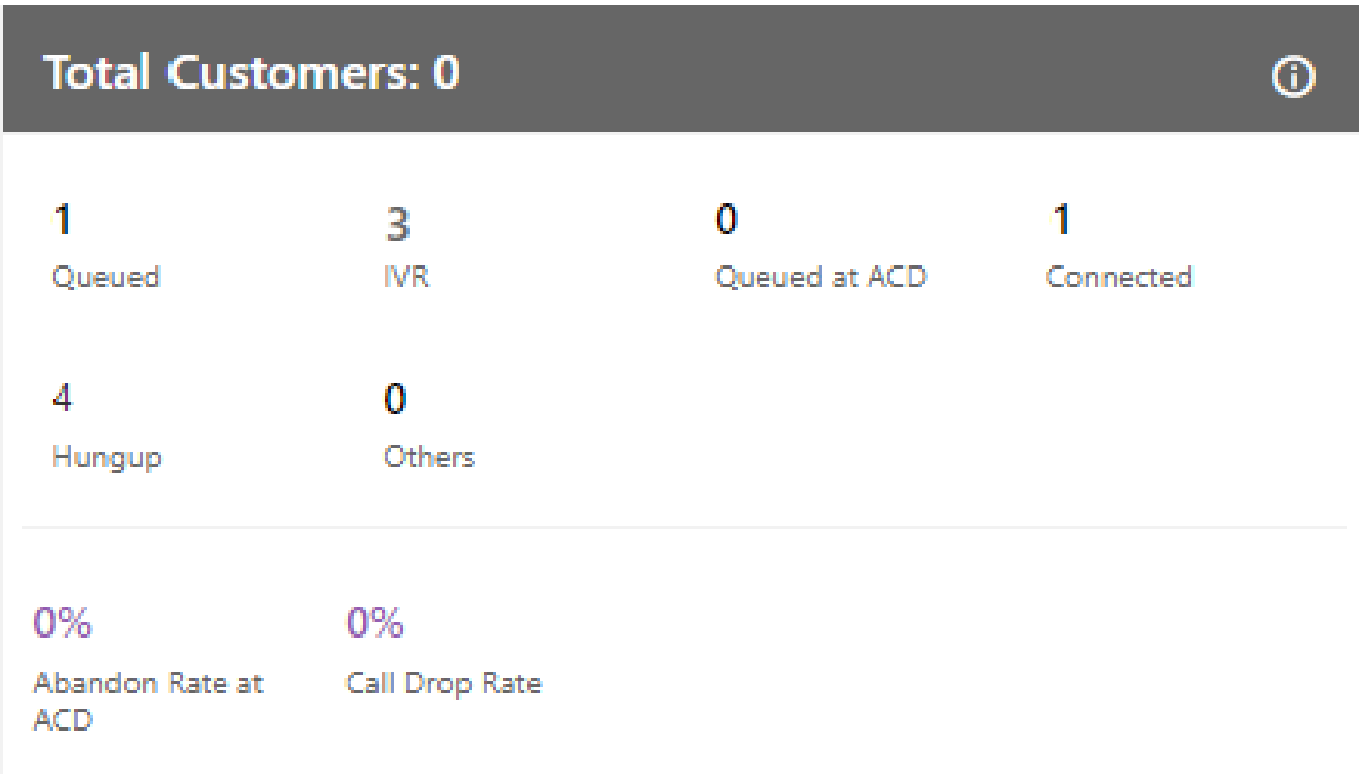
$$\text{Average Hold Duration} = \frac{\text{Total Hold Duration}}{\text{Total Calls with the Hold}}$$

Figure: Calculation of Avg Hold Duration

It shows the data of the last 30 minutes. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.

3.Customer Runtime Summary (Total Customers)

This section provides a **real-time snapshot** of customer activity within the campaign. It tracks calls from the moment they enter the system until they are connected or dropped.



> **Note:** Hover over the **Information (i)** icon to view the "Last Calculated" and "Last Fetched" timestamps. All metrics in this section allow a maximum data refresh interval of **5 to 10 seconds** on the UI.

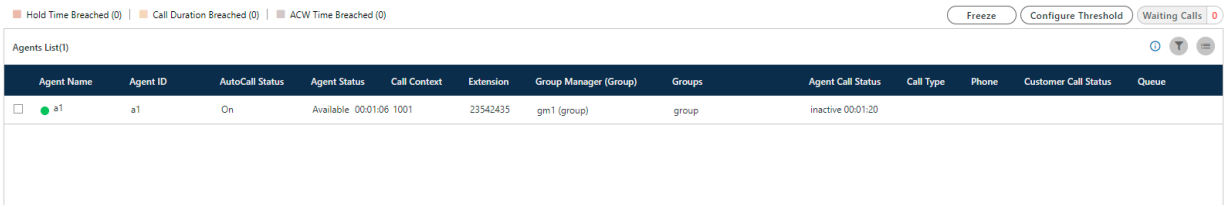
Key Metrics

- **Queued:** The current number of calls (including Preview, and Callbacks) waiting for initialization. In Inbound campaigns, this reflects callbacks and manual callbacks.
- **IVR:** The current number of calls waiting in the IVR menu.
- **Queued at ACD:** The current number of calls waiting at the Automatic Call Distributor (ACD) for an available agent in a campaign.
- **Connected:** The total number of currently connected calls in the campaign.
- **Hungup:** Calls that have been disconnected (by agent or customer) but **not yet disposed** of by the agent in the campaign.
    - *Context:* Once the agent selects a disposition, this count resets on the supervisor's screen.
- **Others:** Calls currently in a transitional "ringing" state (e.g., Transfer to Queue, Transfer to Campaign, Transfer to IVR, or Transfer to Phone).
- **Abandon Rate at ACD %:** The percentage of calls dropped while ringing before reaching the ACD.

- **Call Drop Rate %:** The percentage of calls dropped before an agent could answer.

4.Agent List (Real-Time Monitoring)

The Agent List gives Supervisors a live view of all agents staffed to the campaign. It details their current status, call context, and performance alerts.



> Note: The following list shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.

Agent Columns

1.***Agent Name***: It shows the usernames of the agents who have been assigned in the selected campaign.

2.Agent ID: It shows the IDs of the agents who have been assigned in the selected campaigns.It shows the current data.

3.Extension:It shows the extension selected by an agent or assigned forcefully to an agent.It shows the current data.

4.Auto Call Status: It shows the auto-call status of an agent.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.

5.Agent Status: It shows the status of an agent and the duration since when the agent is on this status.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.

6.Call Context: It shows the call context assigned to an agent.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.

7.Agent Call Status: It shows the call status of an agent. If the agent is on dial user (internal call) or connected on call in other campaign, the columns (call type, customer info, customer status, and queue) will remain blank. There is no feature for the Supervisor to identify such calls.It shows the current data.

8.Call Type: It shows the type of call, which is connected with the agent at present.
If the agent is on dial user (internal call) or connected on call in other campaign, the columns (call type, customer info, customer status, and queue) will remain blank. There is no feature for the Supervisor to identify such calls.

9.Phone: It shows the customer information. As of now, the call context is being displayed in case of Outbound calls where the phone number is being displayed in case of manual dial calls.

10.Customer Call Status: It shows the status of the call of the customer.

11.Working Mode: It shows the selected working mode by the agents.

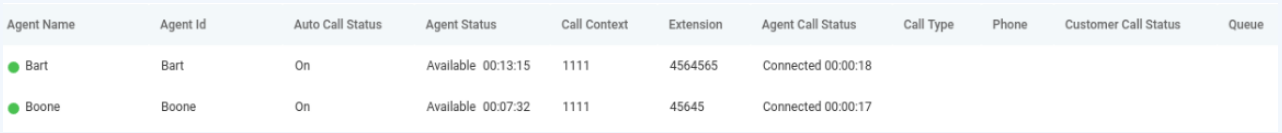
12.Queue: It shows the name of queue in which the Outbound call has arrived. Even if the agent has been assigned in the multiple queues, still the name of that queue will be displayed in which the agent is connected to the customer.It shows the current data.

13.Group Manager: It shows the name of the group manager under which the agent is assigned into.

17.Groups: It shows the name of the groups in which the agent is assigned into.

18.Table Filters: It shows the name table filter name when the masking feature is enabled.

> If any agent is on call through Dial User App, then the metrics like Call TYpe, Phone, Customer Call Status, and Queue in Agent List will remain blank. However, the Agent Call Status should remain "Connected".



Agent Name	Agent Id	Auto Call Status	Agent Status	Call Context	Extension	Agent Call Status	Call Type	Phone	Customer Call Status	Queue
Bart	Bart	On	Available 00:13:15	1111	4564565	Connected 00:00:18				
Boone	Boone	On	Available 00:07:32	1111	45645	Connected 00:00:17				

Figure: Status of Agents who are on call using Dial User App

Operational Filters

Supervisors can click specific status buttons to instantly filter the Agent List:

- **Break:** View agents currently on break and their duration.
- **Ready:** View agents available to take calls.
- **Connected:** View agents currently speaking with customers.

- **On ACW:** View agents performing After Call Work (disposing calls).
- **Customers on Hold:** View agents who have placed customers on hold.

Threshold Configuration (Licensable)

Supervisors can configure time limits (Thresholds) for specific agent activities. If an agent exceeds these limits, their status in the Agent List changes color to alert the Supervisor.

> This feature is licensable, hence contact your administrator for further information on same.

(Internal Team:)

Execute the following query to enable Call Duration Breached Threshold on UI (as it is not enabled by default).

Execute following query to access database.

```
psql -U postgres <Ameyo_Database_Name>
```

Execute following query to enable Call Duration Breached Threshold.

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

> You have to enter all the campaign id's for all those campaigns in which you want to configure "Call Duration Breached". After this configuration, you can provide the Call duration breached time from UI.

Types of Thresholds

- **Hold Time Breached:** Alerts when a customer is kept on hold longer than the allowed limit.

If the agent exceeds the hold time limit the color of the agent turns to the hold time breached color, but the moment he resumes the call, the color of the agent again turns to white. In the same way, if the agent put the call on hold multiple times then the agent list call status turns to the respective colors again and again, which signifies that the agent status color depends on the status of his call on runtime. The color of the agent list for call status is runtime.

- **ACW Time Breached:** Alerts when After Call Work exceeds the defined limit.
- **Call Duration Breached:** Alerts when the Total Call Duration (Talk Time + Hold Time) exceeds the limit.
    - *Setup:* Requires database configuration to enable activityParameterCallDurationVisible.
- **Break Duration Breached:** Alerts when an agent's break exceeds the configured time for that specific break reason.

How to Configure

1. Click the **Configure Threshold** button in the Agent List bar.

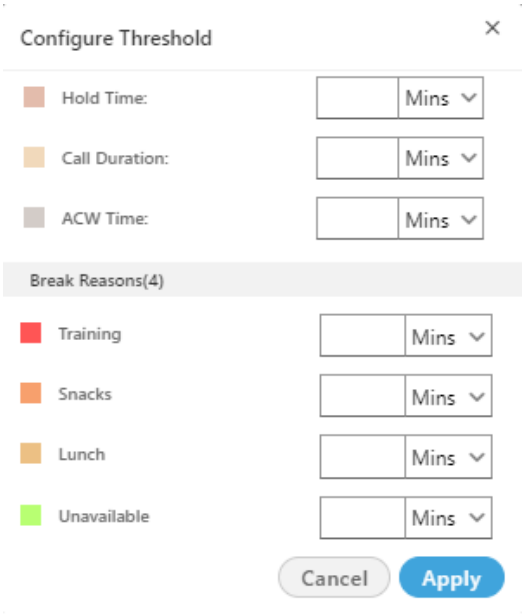
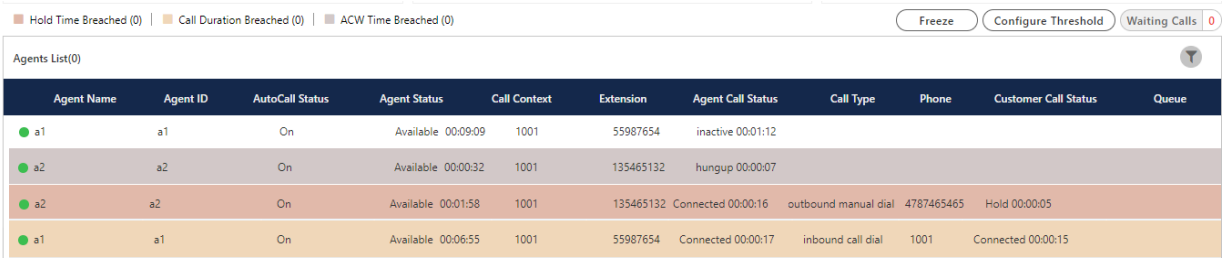


Figure: Configure Threshold Values

2. Enter time limits for **Hold Time**, **ACW**, and **Call Duration**.
3. Set specific limits for each **Break Reason** (e.g., Lunch, Bio Break).
4. Select the time unit (Minutes or Seconds).
5. Click **Apply**.

After configuring the threshold values, the status starts coming in the "Agent List" wizard of window.



Freeze or Unfreeze

You can click on the "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 the latest updates.

Search

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

Waiting Call

It shows the total number of calls which are waiting to be answered in campaign. Click "Waiting calls" buttons to see the list of all the calls which are waiting in that campaign and queue.

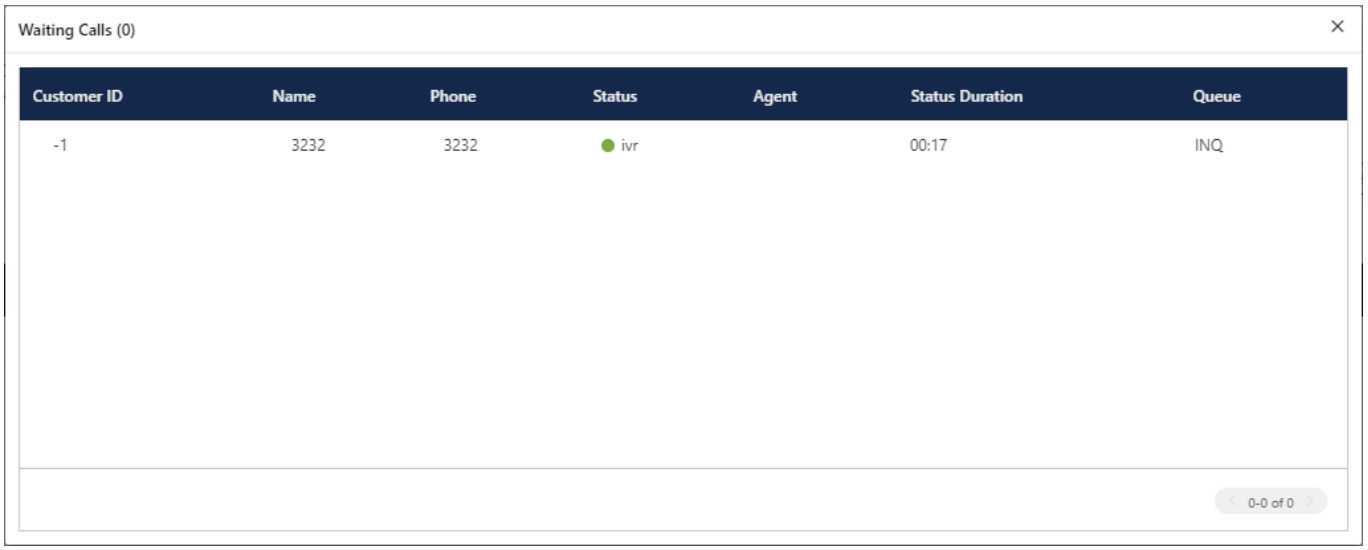


Figure: Waiting Calls

The opened pop-up contains the following columns.

1. ***Customer Id***: It shows the id of the registered customer. If the customer is not registered, then it shows "-1" as customer id.
2. ***Name***: It shows the name of the customer, if registered. If the customer is not registered, then it shows the extension name from which the call is coming.
3. ***Phone***: It shows the phone number of the customer.
4. ***Status***: It shows the status of the call in which it is currently present.
5. ***Agent***: It contains the agent name to whom the call is going to assign. If there is no agent free at the time of call, it shows blank as agent name.
6. ***Status Duration***: It shows the total time of the call which is spent by the call before assigning it to any of the agent.
7. ***Queue***: It shows the name of the queue in which the call has been assigned or landed

Filter

Supervisor can click icon to filter the data as per the selected table filters in the filter modal.

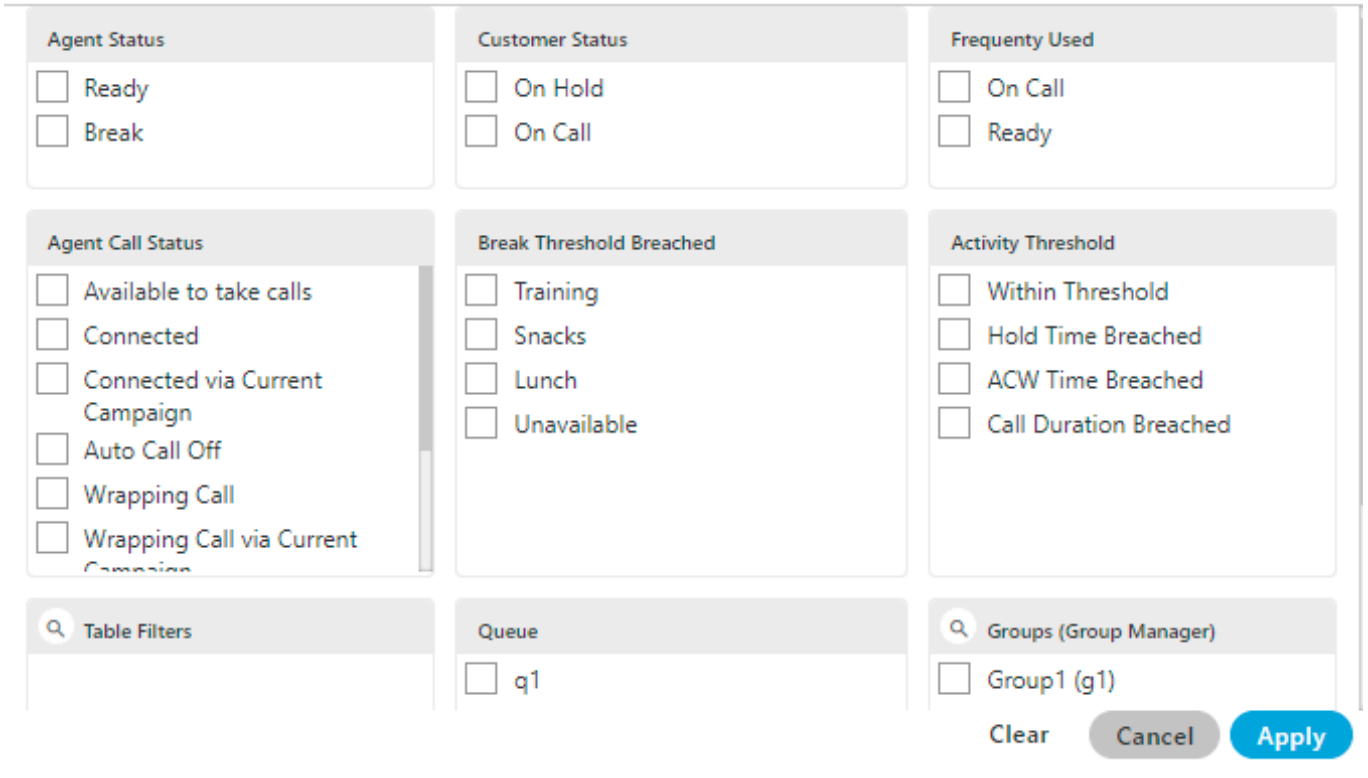


Figure: Table Filters in the Filter modal of Agent List

If Filter Groups are enabled in the campaign, then "Filter Groups" column will also be added in Agent List and Filter Modal.

The Supervisor can search through the values of both "Filters" and "Filter Groups" column in Agent List.

1. **Customer Status** : The supervisor can select the status of the customer either the customer is on the call or on the Hold.
    - **On Call** : It means that the agent is on the call with the customer.
    - **On hold** : It means that the agent is either not active on the call or the agent put the customer's call on hold.
2. **Frequently Used** : It shows the frequently used filters which are used by the supervisors mostly.
3. **Agent Status** : It filter the agents based on the status of their work, that is, whether the agent is ready or is on the break. It contains the following options.
    - ***Ready*:** It shows the agents who are ready to attend the calls.
    - ***Break*:** It shows the agents who are on break.

> If the agent is automatically set on "Auto Available" just after the logon, then the break count will be increased by 1.

1. **Agent Call Status** : The supervisor can filter the status of the agents from the following status.
    - **Available to take calls** : It means that the agent is free and available to take the next call.
    - **Connected** : It means that the agent is connected with the campaign and also selected the extension.
    - **Connected via current campaign** : It filters those agents which are connected with the campaign in which the supervisor is connected at that time.
    - **Auto Call Off** : It shows that the agent is not on the auto call or the auto call for those agents are off.
    - **Wrapping Call** : It filters for those agents who are wrapping-up their calls or agents who are disposing off their calls.
    - **Wrapping Call via current campaign** : It filters for those agents who are wrapping-up their calls with the current campaign with which the supervisor is logged-in at the same time.

2. **Activity Threshold** : It allows the supervisor to filter for those call which are in the various threshold range. It contains the following parameters which can be used to filter the list.
    - ***Within Threshold***: It filter the list of those agents which are lying in the threshold limit set by the administrator.
    - ***Hold Time Breached***: It filters the list of those agents who breached the hold time limit set by the administrator.
    - ***ACW Time Breached***: It filters the list of agents who breached the time limit to dispose off the call which is set by the administrator.
    - ***Call Duration Breached***: It filters the list of agents who breached the limit of Call duration which is set by the administrator as well.
3. **Break Threshold Breached** :The supervisor can search those users whose status is on break and the break time configured by the supervisor has already been breached. It contains all the break reason which are configured in the system by the administrator.
4. **Queue** : The supervisor can filter the agents assigned in selected queue.
5. **Groups (Group Manager)** : The supervisor can filter the agent list according to the groups and group manager names.

Monitoring a Call

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

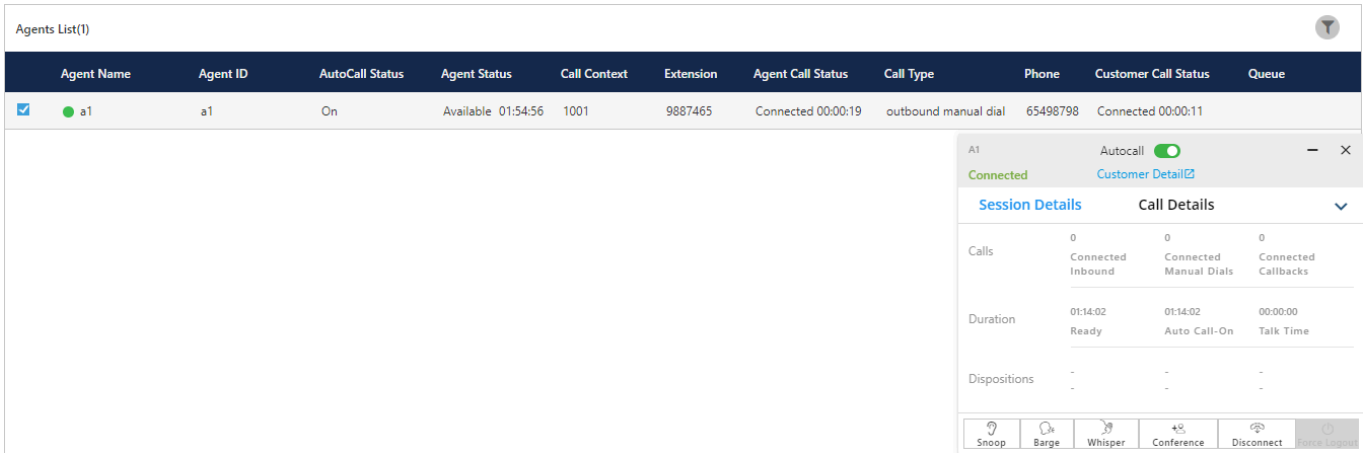


Figure: Live Monitoring of a Call

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.

> Exceptional case: When an agent performs "Transfer to User" for an inbound call and transfers it to another user, then the Call Type for such a call is not available in Live Monitoring tab. For example, agent 1 has received a call and then transferred it to agent 2. In this case, the customer will be reflecting with the agent 1 rather than the agent 2. The supervisor will see that the customer is connected with agent 1.

Session Details

- **Calls:** Count of Autodial (in case of the 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 the top 3 dispositions.

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 the Outbound campaign) / Queue (Queue Name in case of Inbound campaign) and Call Type (inbound/auto dial/manual dial).

Monitoring Operations

The 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 5.the floating window using up and down arrow icons respectively.

Live Call Monitoring Operations (Agent Coaching and Monitoring)

Supervisors can perform active monitoring actions on live calls. Clicking on any agent record opens a **Floating Window** with session details and control buttons.

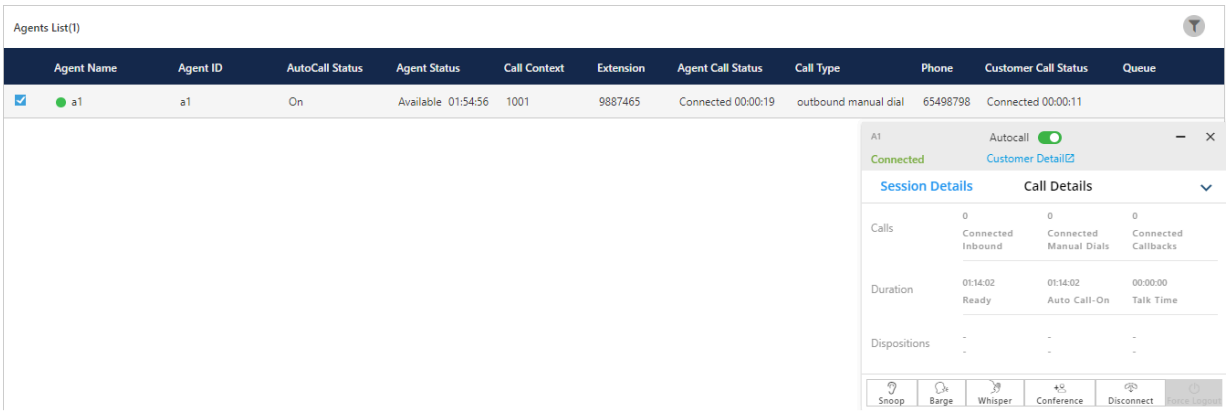


Figure: Live Monitoring of a Call

Session Details

- **Calls:** Count of Autodial (in case of the 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 the top 3 dispositions.

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 the Outbound campaign) / Queue (Queue Name in case of Inbound campaign) and Call Type (inbound/auto dial/manual dial).

Monitoring Actions

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

1. Click on Snoop button to connect in between the call in Snooping mode.
2. While snooping a call, both agent and caller will remain unaware of the supervisor's activity.
3. To end the snoop call, click on the same button again.

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

1. Click on the Whisper button to connect in between the call in Whisper mode.

2. Customer will only hear the voice of the agent (not the Supervisor).
3. The Supervisor can end whisper call by clicking the same button again.

- **Conference:** This feature can be used if supervisor wants to force confer a live call. Supervisor needs to follow the 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 he button enabled.
2. Click confer button to connect in between the call.

- The Supervisor can end the conference call by clicking the same button again.

> If "Confer Call" privilege has been masked for a Supervisor, then "Call Conference" for that Supervisor will also be masked in the modal of call monitoring of "Live Monitoring" Tab.

It is a Campaign-level Privilege, which can be configured by Administrator and Supervisor. The change made by a Supervisor for this privilege will override the privilege configured by the Administrator.

- **Barge**

1. Select the record of an agent who is on a live call, the floating window will open with the 

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.

Disconnect

Supervisor can force Disconnect the live call of any agent by clicking on 

icon. Both customer's and agent's channel will be disconnected.

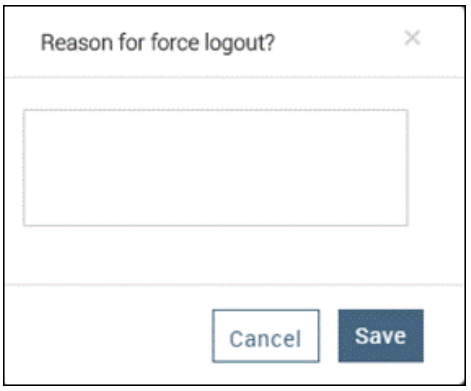
Force Logout an Agent

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

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

2. The Supervisor can click 

icon to logout a user forcefully. The following pop-up is displayed on the screen. Enter a **Reason** for the logout (Mandatory).



3. Click **Save** to confirm session termination.

Working Mode Selection Monitoring

Due to the covid-19 pandemic situation, all organizations were operating from home. But, after restoration of situations, the organizations started mixed mode of working, where some agents started working from office and some of the agents are working from home. In such scenarios, the work of supervisor to monitor the agents is increased, as the supervisor would want to know the agent's working mode. This will help the supervisor to know how to communicate with the agent. Thus, to provide the better agent monitoring, the working mode selection functionality has been provided to the agents, which a supervisor is also able to view.

Thus if the working mode selection is available/configured for the agents, then a data metric column will be available to the supervisor in the Agents List section. It will show the selected working mode by the agent. The following two working mode selection is present:

1. **WFO (Work from Office):** The agents who are working from Office, have to select this working mode option.
2. **WFH (Work from Home):** The agents who are working from home, and is enabled with Ameyo remote solution, have to select this working mode option.

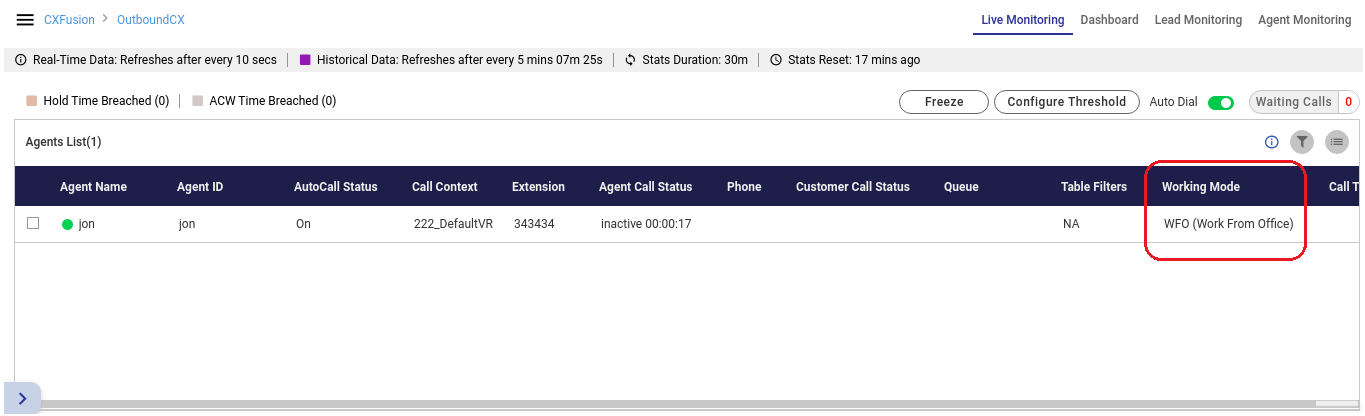


Figure: Monitoring of Selected Working Mode

Version History

Version	Enhancement	Release Notes
4.13.33	`liveMonitoringRefreshTimerMs` – configurable dashboard refresh interval (4–10 s, default 10 s)	**Contact Center - Patch Release Notes - Version 4.13.33**

19.2.4.1.3. Queue Monitoring in Inbound Campaign

This dashboard provides Supervisors with a granular, real-time view of the workforce (Agents) and the current call traffic (Customers). It allows for active management of ongoing calls, monitoring of agent states, and immediate intervention when necessary.

Note: The data on this screen refreshes automatically every **5 to 10 seconds**.

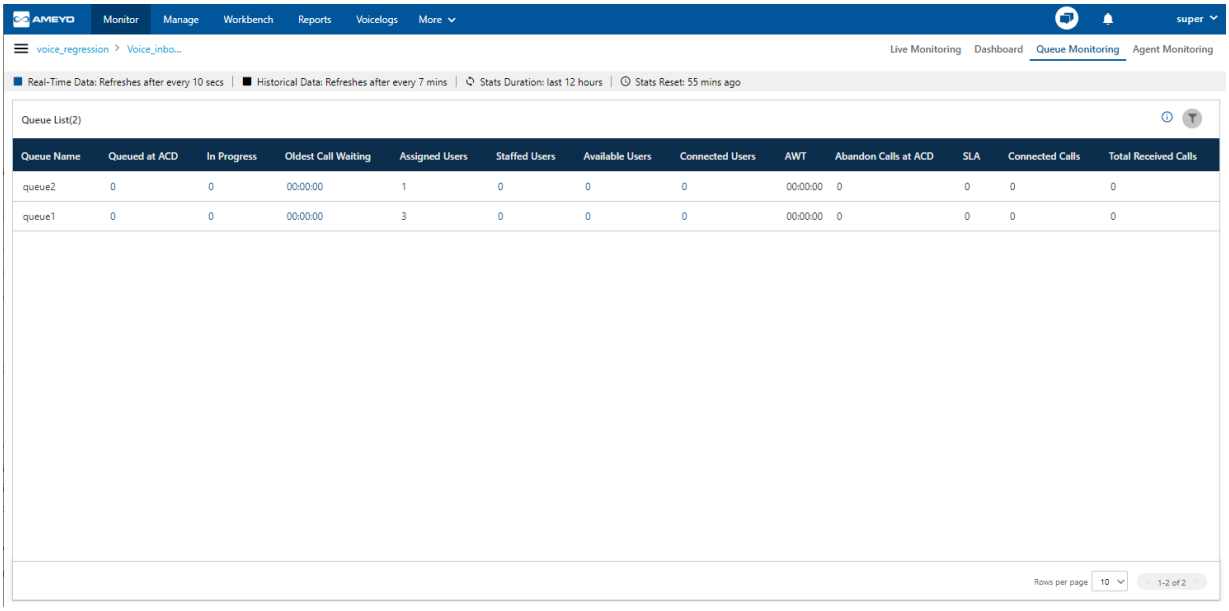


Figure: Queue Monitoring of Inbound Campaign

Data Collection Indications

On the top, a horizontal bar shows the indications of different data collection intervals.

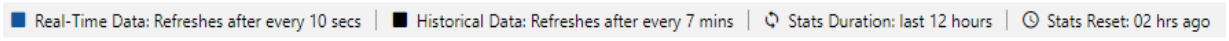


Figure: Data Collection Indications

- **Real-Time Data:** The Data Metrics, whose data is refreshed after 5 seconds, then it will be indicated with the border of blueish color.

- **Historical Data:** The Data Metrics, whose data is refreshed after every 5 minutes, then it will be indicated with the border of black color.
- **Stats Duration:** It informs about the time interval for which the statistics are showing on the page. Here, the time interval selected is the 02 hours.
- **Stats Reset:** It informs the interval after which the statistics were reset last.

Filter

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

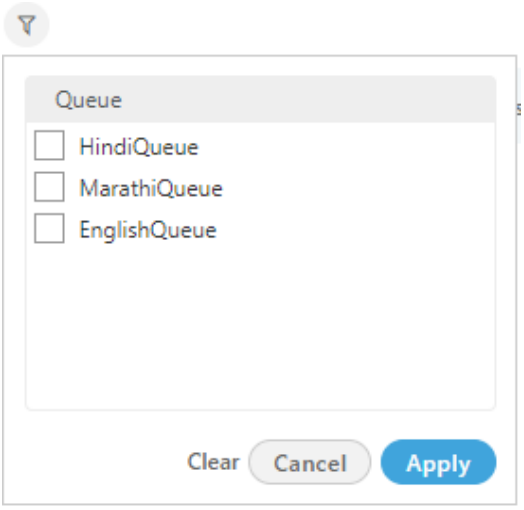


Figure: Filter

Additional Information

Hover the mouse over icon to see the information on the data that is, Statistical data, Last calculated time and last fetched time.

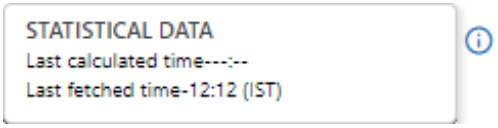


Figure: Additional Information of Queue Monitoring

Columns

It contains the following columns:

Real-Time Status Metrics

Data Refreshes: Every 5-10 seconds

Metric	Description
Queue Name	Lists queues assigned to the campaign. Newly assigned queues appear within 10 seconds.
Queued at ACD	Current number of calls waiting for distribution to an agent.
In Progress	Total ongoing calls currently connected to agents (answered but not yet disposed).
Oldest Call Waiting	The wait time of the longest-pending call currently in the queue (e.g., *10 minutes*).

User Availability Metrics

Data Refreshes: Every 5-10 seconds

Metric	Description
Assigned Users	Total agents mapped to this queue (includes all states: Ready, Break, On Call, etc.).
Staffed Users	Total agents currently **logged in** and assigned to this queue.
Available Users	Count of extensions currently available to take a call. *(Note: If an agent has two extensions, this counts as 2 available lines).*
Connected Users	Count of extensions currently engaged in a call.

Cumulative Performance (Last 12 Hours)

Data Refreshes: Current data ~2.5 mins | Historical data ~32 mins

Metric	Description
AWT (Avg Wait Time)	Average time calls waited in the queue before being connected. $\text{Average Wait Time} = \frac{\text{Total Wait Time}}{\text{Count of Total Calls in Campaign}}$
Connected Calls	It is the count of calls that have been answered in the queue. If the call has been transferred to another queue in the same campaign, then it will be counted in Answered Calls only when the call has been completed.
Total Received Calls	It shows the count of the total number of calls that has been closed with any disposition. It includes those calls also which are connected for the first time and those calls which have been dropped in the queue (that is not connected to any agent).
Abandon Calls at ACD	Calls disconnected by the customer or system timeout while waiting for an agent.
SLA %	SLA percentage is equal to the total connected calls within the threshold after reaching the Automatic Call Distribution (ACD) divided by the total number of received calls that reaches ACD. **SLA Calculation:** $\text{SLA} = \frac{\text{Total Connected Calls with Threshold}}{\text{Total Received Calls}} \text{ X } 100$ $\text{SLA} = \frac{\text{Total Connected Calls with Threshold}}{\text{Total Connected Calls + Total Abandon Calls at ACD + Total Abandon Calls at Ringing}} \text{ X } 100$

Definitions

Following are the definitions of metrics used in the above calculation.

- **Threshold:** The default threshold is 20 seconds but the administrator can change it in the Administrator Console.

- **ACD:** It is a standard term that means Automatic Call Distributor, which is a sophisticated system to answer and route inbound calls to the user-defined agents automatically. To know more about ACD, please check the respective feature **document**
- **Total Received Calls:** It is the sum of Total Answered Calls (sum of all Inbound Calls and Transfer to Campaign calls), Total Abandon Calls at ACD, and Total Abandon at Ringing Calls.

$$\text{Total Received Calls} = \text{Total Connected Calls} + \text{Total Abandon Calls at ACD} + \text{Total Abandon Calls at Ringing}$$

- **Total Answered Calls:** It is the total number of calls answered by the Agents including both Inbound Calls and Transfer to Campaign calls.
- **Total Abandon Calls at ACD:** It is the total number of calls that are disconnected by the customer while waiting for the agent.
- **Total Abandon Ringing Calls:** It is the total number of calls that are disconnected when the phone of the agent (assigned to that call) is ringing.

Special Cases:

- Short calls (customer talk time <10 sec) are considered in Abandon calls at ACD as well in Connected calls.
- Cumulative wait time is considered in the campaign for re-ACD cases. For example, if the call is routed to different queue on timeout(when all the staffed agents are busy handling the calls), then the wait time calculated is the sum of the wait time of all the queues via which the call is routed.

It shows the data of last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 40 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.

19.2.4.1.4. Agent Monitoring in Inbound Campaign

The **Agent Monitoring** section allows supervisors to track and manage agent activities within an **Inbound Campaign**

.

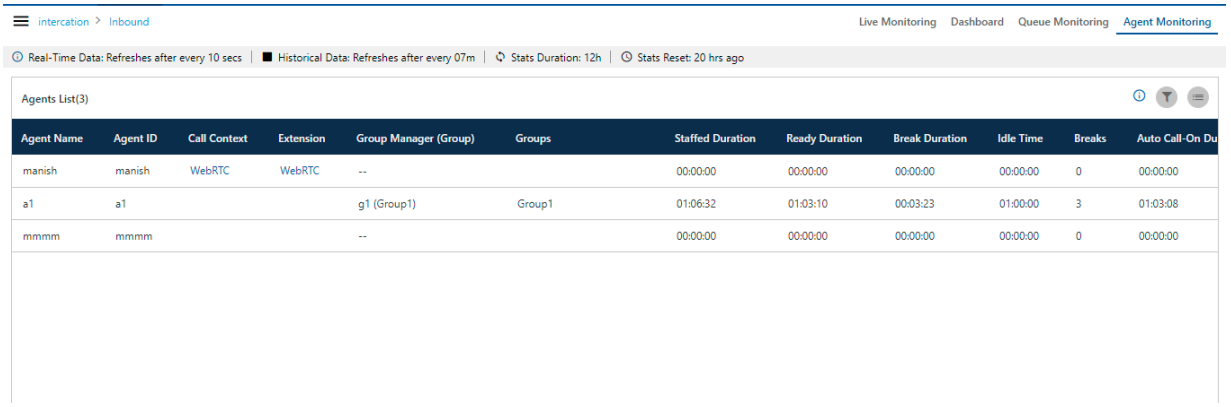


Figure: Agent Monitoring

You can perform the following operations here.

Data Collection Indications

On the top, a horizontal bar shows the indications of different data collection intervals.



Figure: Data Collection Indications

Filter

Using the filter icon, supervisor can filter the agents on the basis of their Groups(Group Manager)

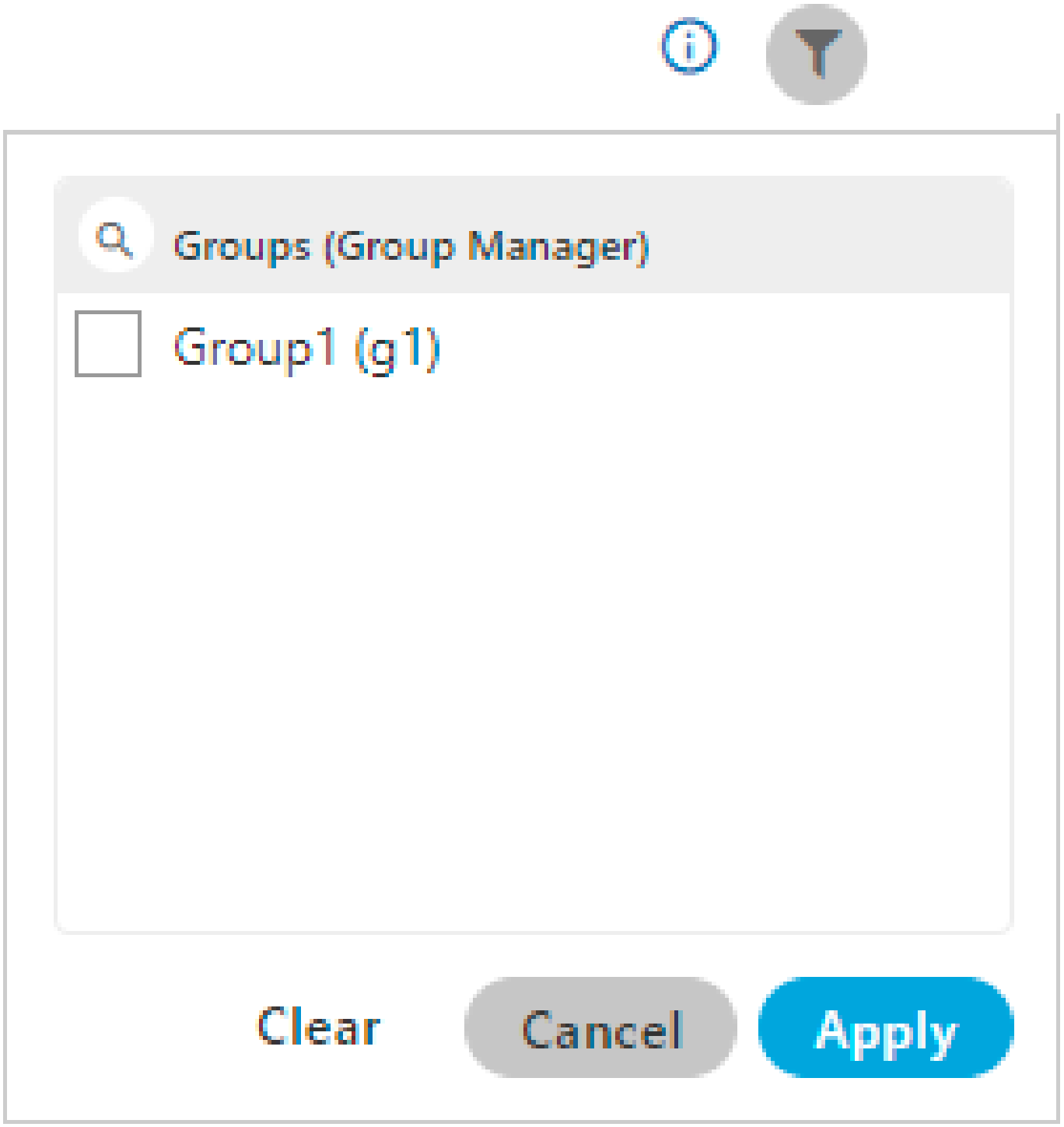


Figure: Filter

- **Real-Time Data:** The Data Metrics, whose data is refreshed after 5 seconds, then it will be indicated with the border of blueish color.
- **Historical Data:** The Data Metrics, whose data is refreshed after every 5 minutes, then it will be indicated with the border of black color.
- **Stats Duration:** It informs about the time interval for which the statistics are showing on the page. Here, the time interval selected is the 12 hours.
- **Stats Reset:** It informs the interval after which the statistics were reset last.

Search

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

User Card

The supervisor can see the basic information of agents assigned in that campaign by hovering its mouse over the agents name. The user card is displayed while hovering the mouse on the user name of the user. Following screen is displayed while hovering the mouse over the username of the user.

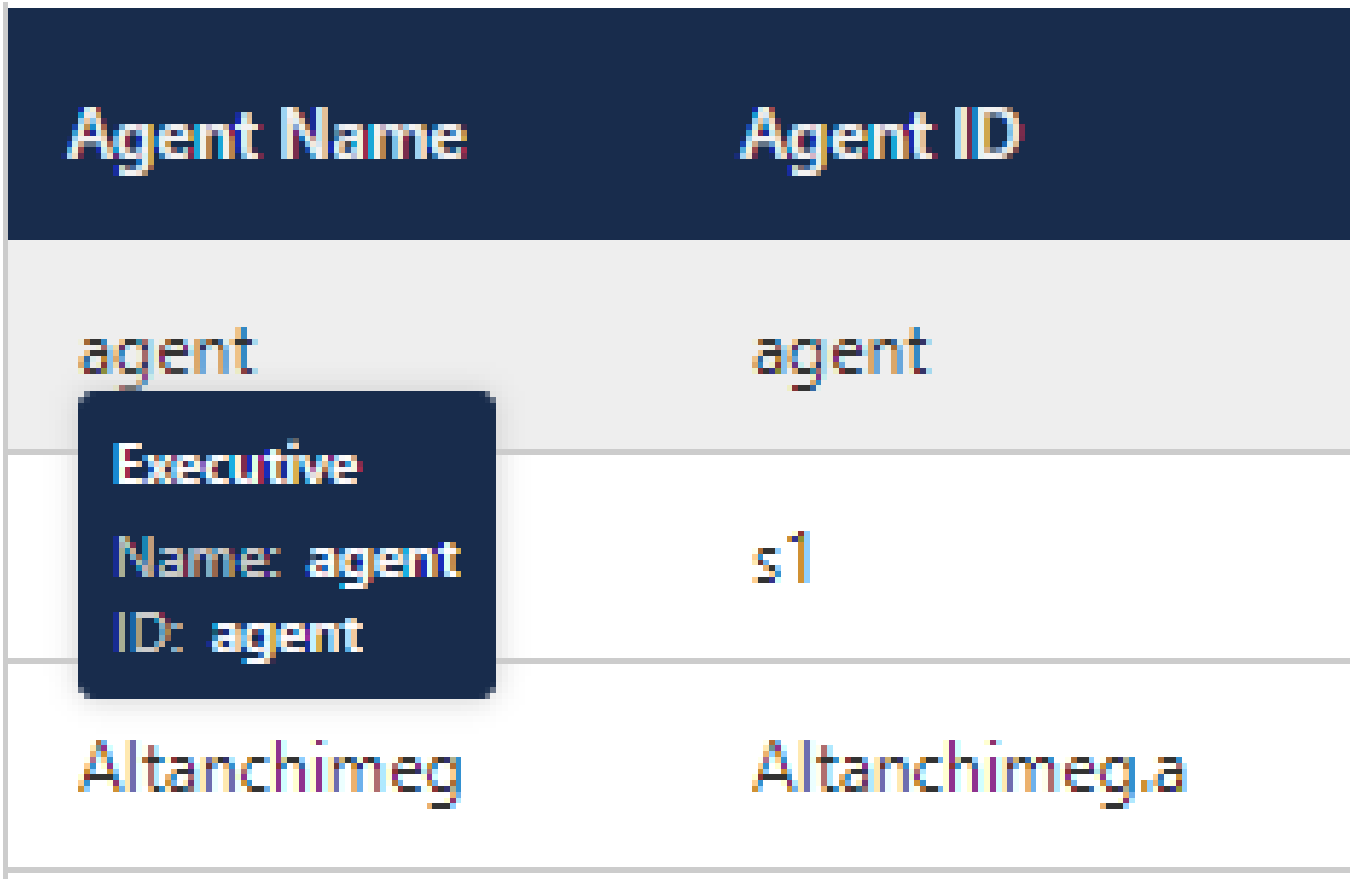


Figure: User Card

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

Additional Information

Hover the mouse over icon to see the information on the data that is, Statistical data, Last calculated time and last fetched time.

Customize the View

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

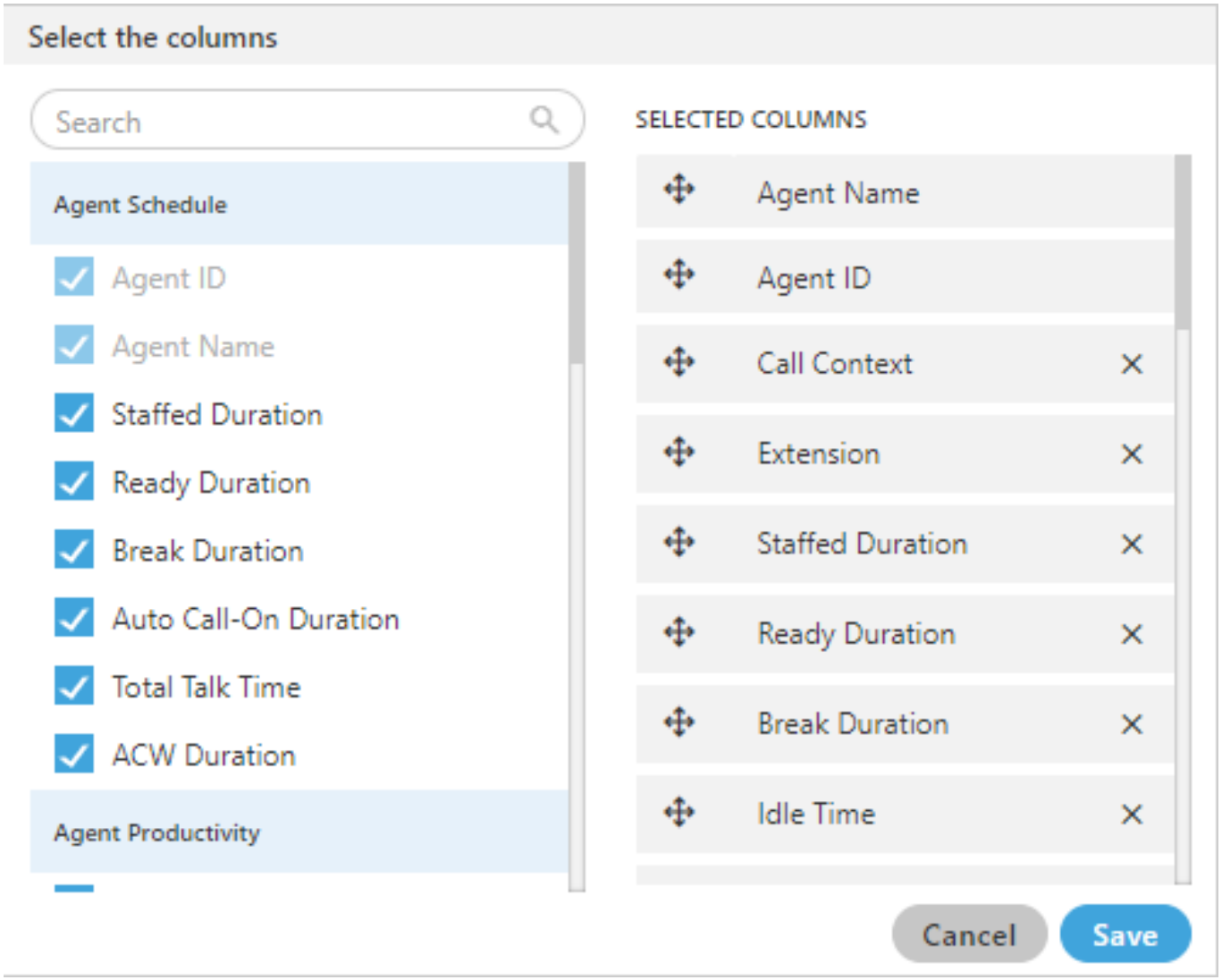


Figure: Column Headers

In the right part of the section, the user can click and hold icon and drag a column upward or downward to change the sequence of the columns in the table. The column on top will be displayed at the first position from the left.
If some columns are mandatory to be displayed, then the user will not have the option not to select or deselect the colums.

Select the column headers that you want to display on the Agent Monitoring Page. It contains the following customizations.

1. **Agent Schedule:** It contains the following columns which the supervisor can select from.
    - **Call Context:** It shows the name of the call context selected by the agent. In case of multiple extensions with an agent, the only one call context will be visible. If the

agent changes the call context, then the row will be updated in maximum 2 minutes 35 seconds.The agent name may not be visible in any of the following cases.

- The Refresh Time is not reached.
- The agent has not selected the extension containing the selected call context.
- In the case of WebRTC, the call context name will be auto-generated.

The row will be visible after 5 minutes. It shows the current data and its maximum Data Refresh Interval is 2 minutes 35 seconds.

- **Staffed Duration:** It is the total time duration (that is the plus of the total ready time and the total break time) in which the agent has been assigned in the campaign for the last interval.
  Calculation : $\text{Staffed Duration} = \text{Total Ready Duration} + \text{Total Break Duration}$ **Figure:** Calculation of Staffed DurationIf the user has selected multiple campaigns, then only one campaign will be displayed here.
  Here, the time is being calculated as per a campaign. Therefore, the time spent by the user after the logon but before selecting a campaign will not be counted here.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
- **Extension:** It shows the agent's phone numbers. In the case of multiple extensions, only the selected call context in one row will be visible. The local and endpoints will not be displayed here.
  The agent has been logged on to the system but its name may not be visible in any of the following cases.The row will be visible after 5 minutes. It shows the current data and its maximum Data Refresh Interval is 2 minutes 35 seconds.
  - The Refresh Time is not reached.
  - The agent has not selected the extension containing the selected call context.
- **Ready Duration:** It is the total ready duration of an agent in a campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
- **Break Duration:** It is the total break duration of an agent.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2

minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.

- **Breaks:** It shows the count of breaks taken by the agent staffed to this campaign.If the agent is automatically set on "Auto Available" just after the logon, then the break count will be increased by 1.
- **Auto-Call on Duration:** It is the total duration when the agent is on auto-call on status.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.

1. **Agent Performance:** It contains the following columns according to the various agent performances.
   - **Total Talk-Time:** It is the total talk time of an agent for all calls in a campaign.It is the total talk time of an agent for all calls in a campaign. It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
   - **ACW Duration:** It is the total wrap time of an agent for all calls in a campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.
   - **Avg Call Duration:** It is the average call duration for an agent in a campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.
   - **Avg Handling Time:** It is equal to the sum of Customer Talk Time for this agent, Customer Hold Time for this agent, and Wrap Time of Connected Calls divided by the total connected calls for this agent. It includes only Customer Interactions, but Dial User (Internal Calls) are not included.
     Calculation : $\text{AHT} = \frac{\text{Customer Talk Time for this agent} + \text{Customer Hold Time for this agent} + \text{Wrap Time of Connected Calls}}{\text{Total Connected Calls for this Agent}}$ **Figure:** Calculation of Avg Handling TimeAHT does not include the Average Wrap Time of an agent as the Average Wrap Time will also include the wrapping of not connected calls.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.

- **Avg Hold Duration:** It is average hold time of an agent for customer calls in a campaign. It does not include the hold time on dial user (Internal Calls). It is equal to the total hold time divided by the count of customer calls with hold.**Calculation:** $\text{Average Hold Duration} = \frac{\text{Total Hold Duration}}{\text{Total Calls with the Hold}}$ **Figure:** Calculation of Avg Hold DurationIt shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.
- **Avg ACW Duration:** It is the average of ACW Duration of an agent in a campaign. It is the total wrap-up time divided by all wrapped calls for an agent. **Calculation:** $\text{Average ACW Duration} = \frac{\text{Total Wrap Duration}}{\text{Count of Wrapped Calls for the agent}}$ **Figure:** Calculation of Avg ACW DurationIt shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.

2. **Agent Productivity:** It contains the following columns according to the various productivity of the agent's calls.
    - **Connected Calls:** It shows the total calls answered by an agent in the campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.
    - **Connected Inbound:** It shows the total number of inbound calls received in a campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.
    - **Connected Transfers:** It shows the total number of transferred calls received and connected in a campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.
    - **Connected Manual Dials:** It is the total number of manual dials connected to the customers in a campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.
    - **Connected Callbacks:** It is the total number of callbacks attended by an agent in a campaign.It shows the data of the last 12 hours. The Current Data on the User

Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.

- **Total Wrapped Calls:** It is the total number of calls successfully completed and wrapped by the agent in that campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.

3. **Disposition Code:** It contains the following columns of various disposition codes which the agent used while completing their calls.
    - **Foreign Language:** It is the total number of calls disposed in "Foreign Language" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.
    - **Sale:** It is the total number of calls disposed in "Sale" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
    - **Callback:** It is the total number of calls disposed in "Callback" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
    - **Already Hangup:** It is the total number of calls disposed in "Already Hangup" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
    - **Abrupt Disconnection:** It is the total number of calls disposed in "Abrupt Disconnection" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
    - **Echo:** It is the total number of calls disposed in "Echo" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.

- **Customer Not able to hear:** It is the total number of calls disposed in "Customer Not Able to Hear" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
- **Customer Volume Too Low:** It is the total number of calls disposed in "Customer Volume Too Low" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
- **Agent Volume Too Low:** It is the total number of calls disposed in "Agent Volume Too Low" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
- **Voice Breakage:** It is the total number of calls disposed in "Voice Breakage" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
- **Conference Voice Breakage:** It is the total number of calls disposed in "Conference Voice Breakage" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
- **Conference Disconnection:** It is the total number of calls disposed in "Conference Disconnection" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
- **Conference DTMF:** It is the total number of calls disposed in "Conference DTMF" disposition.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.

Columns

It contains the following columns(the columns which are not covered in above section).

Agent Name

It shows the name of the agent.

The row will be visible after 5 minutes. It shows the current data and its maximum Data Refresh Interval is 2 minutes 35 seconds.

Agent ID

It shows the ID of the agent.

The row will be visible after 5 minutes. It shows the current data and its maximum Data Refresh Interval is 2 minutes 35 seconds.

Group Manager

It shows the ID of the group manager under whom the agent is assigned into.

Groups

It displays the group name in which the agent is assigned.

19.2.4.2. Monitor Outbound Campaign

Monitor Outbound Campaign

Here, Supervisor can monitor the Outbound Campaign.

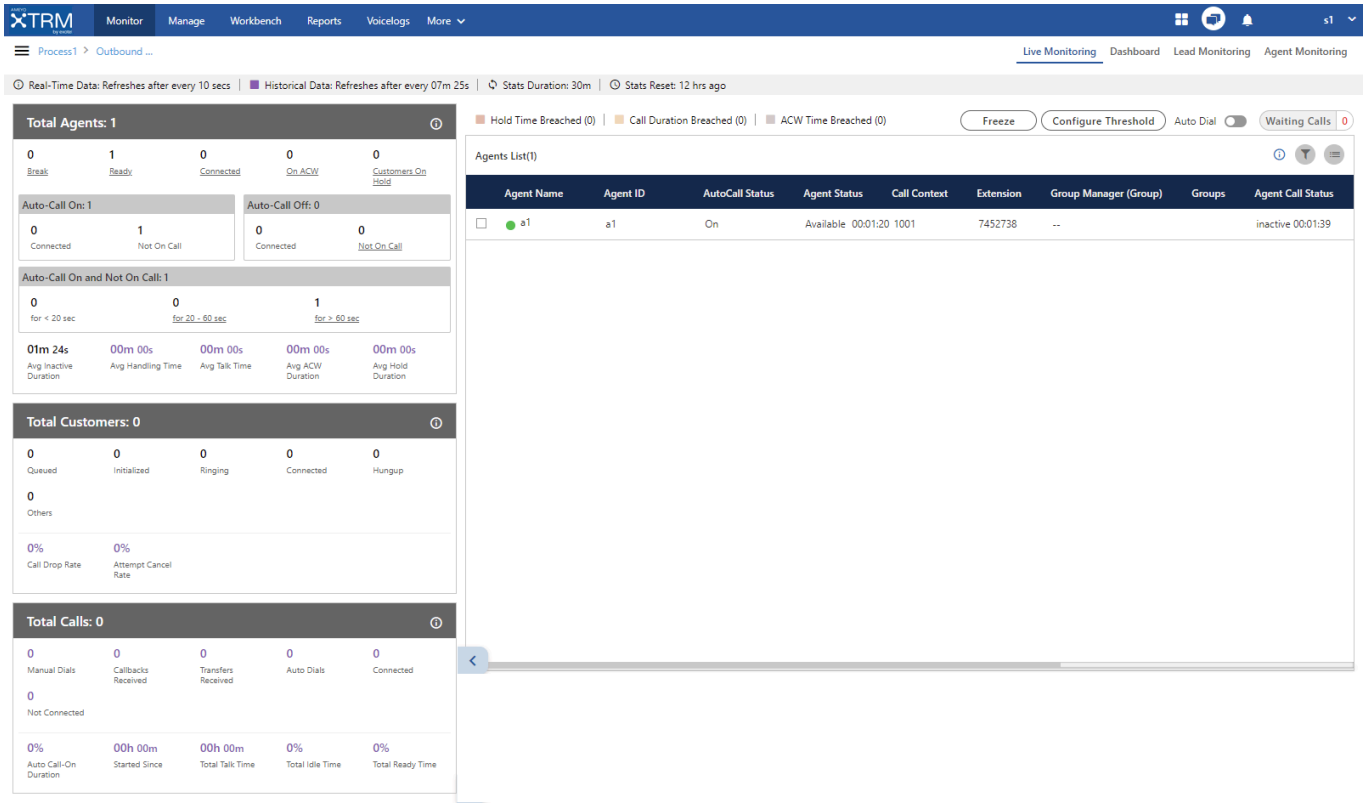


Figure: Monitor Outbound Campaign

It contains the following tabs.

- **Live Monitoring of Outbound Campaign:** Perform the Live Monitoring in the campaign. Know more...
- **Dashboard of Outbound Campaign:** View Dashboard of Outbound Campaign. Know more...
- **Lead Management in Outbound Campaign:** Monitor the leads in the Outbound Campaign. Know more...
- **Agent Monitoring in Outbound Campaign:** Monitor the agents in the campaign. Know more...

19.2.4.2.1. Live Monitoring of Outbound Campaign

The **Agent Monitoring** section allows supervisors to track and manage agent activities within an **Inbound Campaign**.

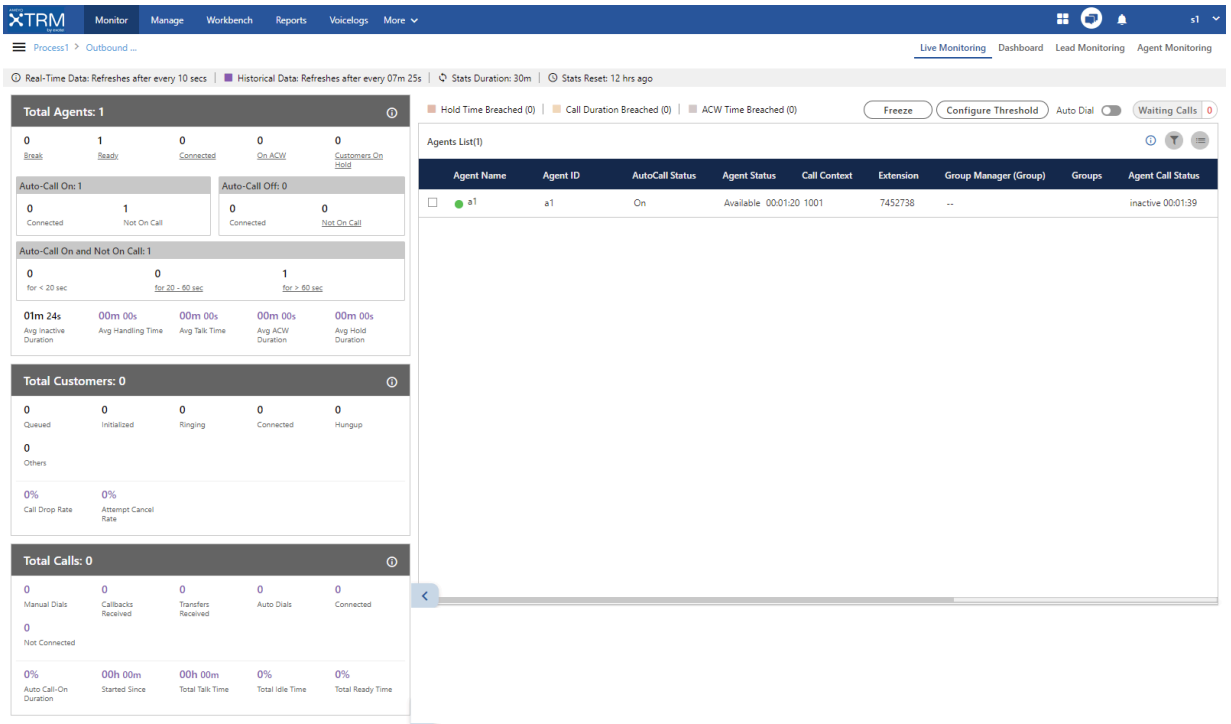


Figure: Live Monitoring

Interface Elements

Overall, the interface of Live Monitoring in Outbound Campaign can be divided into the following sections.

Cautionary Extension Selection Message

At the top of the screen, a cautionary message is displaying in the red bar.It arises in the case when the supervisor does not select the extension of his phone. Select the extension to remove this cautionary mark from the screen.

You can also click on this cautionary bar to select the extension.

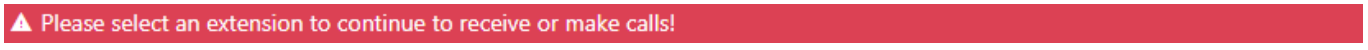


Figure: Cautionary Mark

Data Collection Indications

A horizontal bar at the top displays indicators for different data collection intervals.

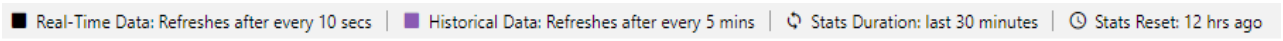
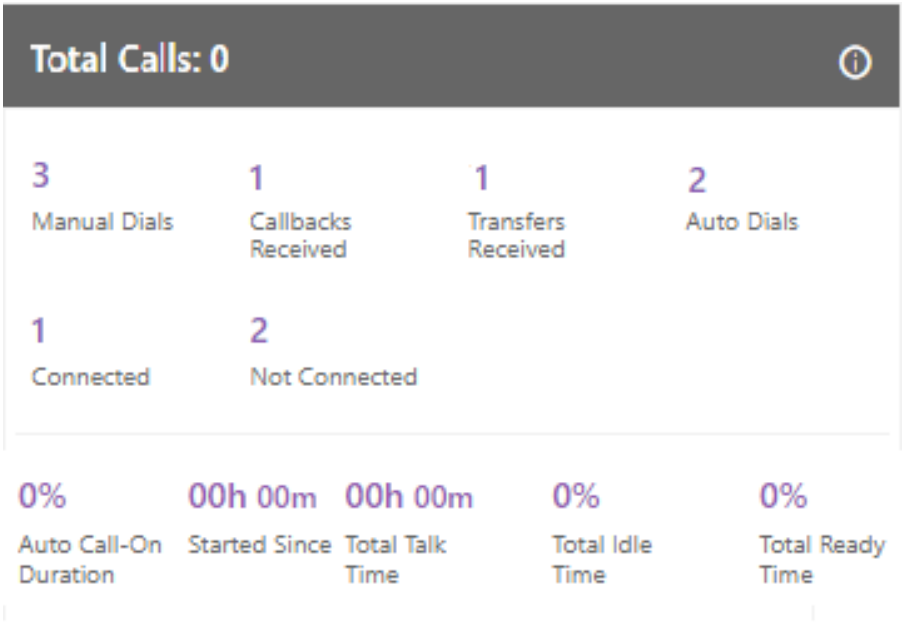


Figure: Data Collection Indications

- **Real-time Data:** Metrics refreshed every **5 seconds** are highlighted with a **blue border**.
- **Historical Data:** Metrics refreshed every **5 minutes** are highlighted with a **black border**.
- **Stats Duration:** Displays the selected time interval for statistics, for example, **12 hours**.
- **Stats Reset:** Indicates when the statistics were last reset.

1.Campaign Runtime Summary (Total Calls)

This section displays the performance of calls processed within the **last 30 minutes**. It shows the runtime summary of all calls made in this campaign.



- **Data Refresh:** Every 5–10 seconds.
- **Timestamps:** Hover over the **(i)** icon to view the "Last Calculated" and "Last Fetched" times.



Key Metrics

- **Volume Metrics:**
  - **Auto Dials:** Total number of auto-dial calls made in this campaign.
  - **Manual Dials:** Total number of manual dial and manual preview dial calls in the campaign.
  - **Callbacks Received:** Total number of callbacks in the campaign including Queue Callback, Campaign Callback, Self Callback, and Preview Callback.
  - **Transfers Received:** Total number of transferred calls received in the campaign.
- **Outcome Metrics:**
  - **Connected:** Total number of connected calls. It shows the total calls answered by the customers in the Outbound campaign.
  - **Not Connected:** Total calls that failed to connect.
- **Time Metrics:**
  - **Total Talk Time:** Total time duration of all agents which they consume on the calling.
  - **Auto-Call On Duration %:** Total percentage of the duration of the agents who had their auto-call status as "ON" while being in the ready state in the campaign.

$$\text{Auto-Call on Duration \%} = \frac{\text{Auto-Call on Duration}}{\text{Ready Duration}} \%$$

  - **Total Idle Time %:** The percentage of Total Idle Duration divided by Total Ready Duration. Here, the Total Idle Duration is the difference between Total Ready Time and Total Service Time in a campaign

$$\text{Idle Duration (\%)} = \frac{\text{Total Idle Duration}}{\text{Total Ready Duration}} \text{ X } 100$$

Figure: Idle Duration Percentage

Here, the following is the definition of Total Idle Duration:

$$\text{Total Idle Duration} = \text{Total Ready Time} - \text{Total Service Time}$$

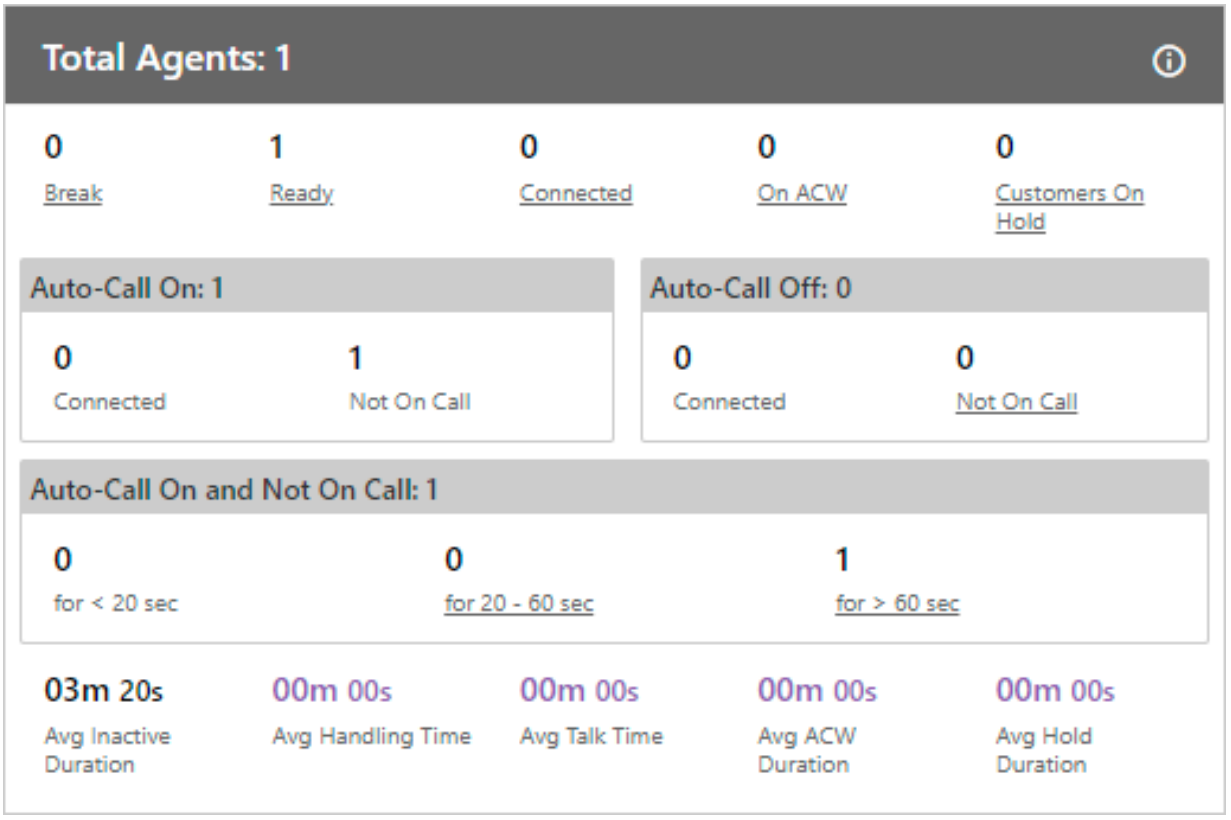
Total Ready Time %: The total percentage of the duration of the agents who were on ready state while being staffed in the campaign.

$$\text{Total Ready Time \%} = \frac{\text{Ready Duration}}{\text{Staffed Duration}} \%$$

2. User Runtime Summary (Total Agents)

This section provides a snapshot of the **current workforce status.** Clicking on specific metrics (like Break or Ready) will filter the **Agent List** below to show only relevant agents.

- **Data Refresh:** Every 5–10 seconds (Current Data).



Agent State Metrics

- **Ready:** The number of unique agents staffed in the campaign, who are on "Available" status.
- **Break:** Number of agents currently on break. ()Number of Agents on Break/Number of Agents whose status is break
- **Connected:** Agents currently on a call.
- **On ACW:** Agents performing After Call Work (disposing calls).

- **Customers on Hold:** Agents who have placed customers on hold even if they are in conference. In the case of the conference where both agents had put the customer on hold, "on hold" count will include both agents.

Auto-Call Status

- **Auto-Call On:** Agents with auto-dialing enabled.
- **Auto-Call Off:** Agents with auto-dialing disabled.

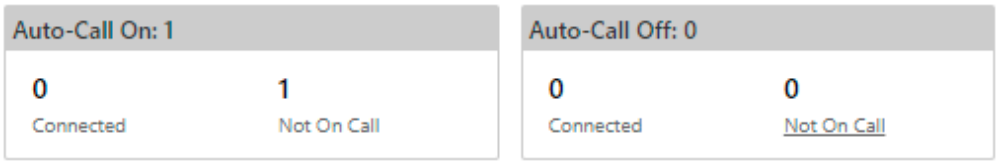


Figure: Auto Call On and Auto Call Off Agent count

- **Auto-Call On and Not on Call**

  "Auto-Call On and Not on Call" are the number of agents whose Auto Call status is On but they are not on any call. It includes an agent only when its status is set as "Auto-Call On" and "Available". It also include agent who has put himself on hold.

  Example: It includes only the current status for all the calculations, that is, if the user (with "Available" and "Auto-Call On" status) is not getting a call from last 60 seconds, and it switched to break for 5 seconds, then after coming back from break, that agent will be seen inactive in "<20sec" field, the last 60 seconds is lost. The count will decrease when the agent selects any break or sets its Auto-Call status as "OFF." The count will increase when the agent selects available after coming from any break or sets its Auto-Call Status as "ON."

Break/Ready	Auto Call On/Off	Operations Permitted	Meaning
Break	No	Not Possible	When an agent selects the break option, their auto-call status will automatically switch to Off
Break	Off	No Operations Permitted	The Manual Dial button and text box are also disabled.
Ready	On	Auto Dial, Callbacks, Manual Dial, Conference and Transfer Call, Inbound Calls	The agent is currently online and is available to receive all incoming calls.
Ready	On	Manual Dial:- Yes Transfer to User Call:- Yes Transfer to Queue Call:- Not Allowed as agent is not considered available for campaign calls Transfer to Campaign Call:- Not Allowed as agent is not considered available for campaign calls Confer to User:- Yes Self/Campaign Callback Call:- Not Allowed as agent is not considered available for callback calls Auto Dial Call:- Not Allowed Inbound Call:- Not Allowed	The agent wants to be visible as online to the system but prefers not to handle PD, Inbound, or Callback calls.

It shows the inactive agents in the following intervals.

- **<20 sec:** It is the total number of agents who are on "Auto-Call On" status and waiting for the calls for less than 20 seconds.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.

- **20-60 sec:** It is the total number of agents who are on "Auto-Call On" status and waiting for the calls from the last 20 to 60 seconds.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.
- **>60 sec:** It is the total number of agents who are on "Auto-Call On" status and waiting for the calls for more than 60 seconds.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5 to 10 seconds.

Average Performance Metrics

- **Avg Handling Time (AHT):** It is equal to the sum of Customer Talk Time, Customer Hold Time for, and Wrap Time of Connected Calls divided by the total connected calls. It includes only Customer Interactions, but Dial User (Internal Calls) are not included.
- **Calculations:**

$$\text{AHT} = \frac{\text{Customer Talk Time} + \text{Customer Hold Time} + \text{Wrap Time of Connected Calls}}{\text{Total Connected Calls}}$$

  - ***Note:*** AHT does not include the Average Wrap Time of an agent as the Average Wrap Time will also include the wrapping up of not connected calls.

- **Avg Talk Time:** It is equal to the total time (in seconds) spent by the agents while talking to the customers divided by the total number of answered customer calls in this campaign.
- **Calculations:**

$$\text{Average Talk Time} = \frac{\text{Total Time Spent by Agents while Talking to Customer (In Seconds)}}{\text{Total Answered Calls}}$$

- **Avg ACW Duration:** It is the average amount of time spent by all the agents in disposing the calls.It represents the average time taken by the Agents to dispose the calls.

- **Avg Hold Duration: Avg Hold Duration**

  It is equal to the total hold time divided by the count of customer calls with holds.

Calculation:

$$\text{Average Hold Duration} = \frac{\text{Total Hold Duration}}{\text{Total Calls with the Hold}}$$

- **Avg Inactive Duration:** It is the average of all inactive duration of the agents staffed in the campaign.

3.Customer Runtime Summary (Total Customers)

This section tracks the lifecycle of leads currently active in the system.

- **Data Refresh:** Every 5–10 seconds (Current Data).

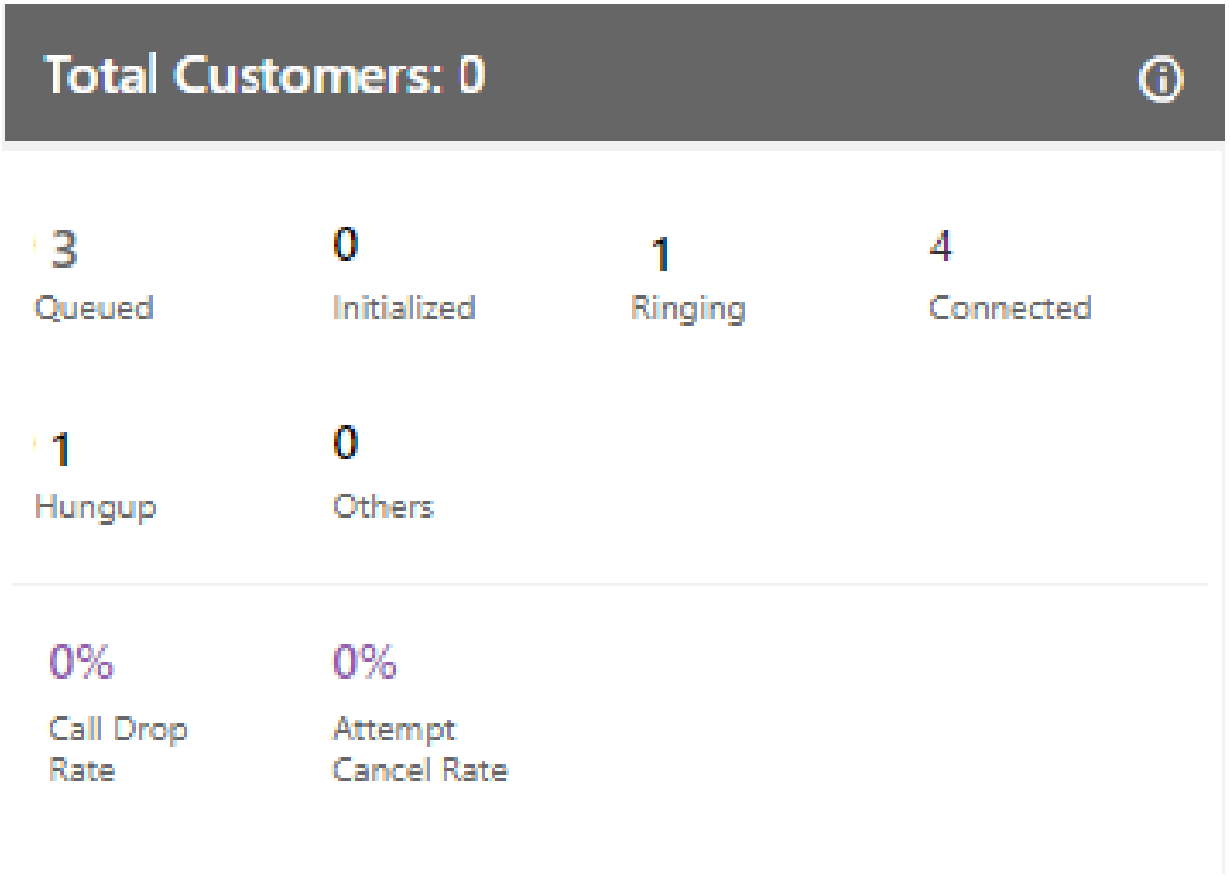


Figure: Customer Runtime Summary

Key Metrics

- **Initialized:** Calls initiated from the campaign to be dialed.
- **Queued:** Calls waiting for initialization (includes Preview and Callbacks).

- **Ringing:** Calls currently ringing on the customer or agent side (includes transfers).
- **Connected:** Total currently active calls.
- **Hungup:** Calls disconnected by the customer but not yet disposed of by the agent.
- **Call Drop Rate %:** Percentage of calls dropped before an agent could answer.
- **Attempt Cancel Rate %:** Percentage of calls canceled due to any reason.
- **Others:** Total number of customer calls where the agent channel is ringing (predictive auto-dials, transfers to campaign or queue) or the call is in a connected transfer-to-phone state.

4.Agent List & Live Monitoring

The Agent List details the status of every staffed agent. Supervisors can filter this list, search for specific users, and perform live interventions.

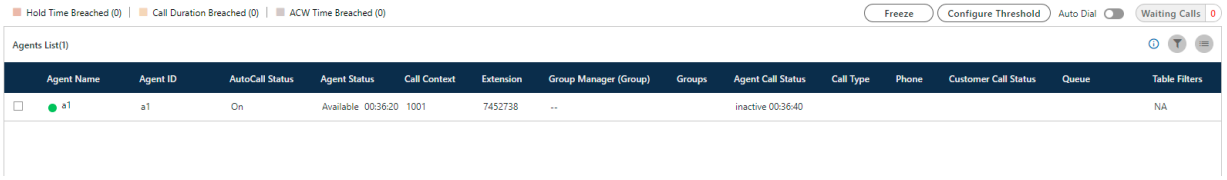
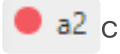


Figure: Agent List

<u>It contains the following columns:</u>

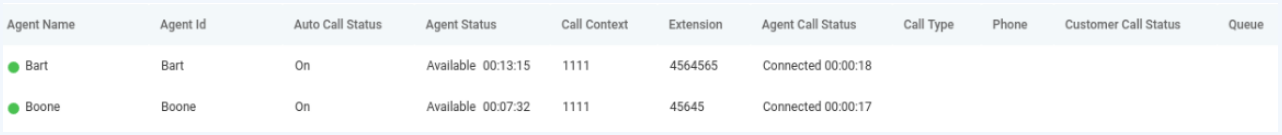
1. **<u>Agent Name</u>:** It shows the usernames of the agents who have been assigned in the selected campaign.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
2. **<u>Agent ID</u>:** It shows the IDs of the agents who have been assigned in the selected campaigns.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
3. **<u>Extension</u>:**It shows the extension selected by an agent or assigned forcefully to an agent.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
4. **<u>Auto Call Status</u>:** It shows the auto-call status of an agent.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
5. **<u>Agent Status</u>:** It shows the status of an agent and the duration since when the agent is on this status.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.

6. **Call Context:** It shows the call context assigned to an agent.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
7. **Agent Call Status:** It shows the call status of an agent. If the agent is on dial user (internal call) or connected on call in other campaign, the columns (call type, customer info, customer status, and queue) will remain blank. There is no feature for the Supervisor to identify such calls.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
8. **Call Type:** It shows the type of call, which is connected with the agent at present.If the agent is on dial user (internal call) or connected on call in other campaign, the columns (call type, customer info, customer status, and queue) will remain blank. There is no feature for the Supervisor to identify such calls.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
9. **Phone:** It shows the customer information. As of now, the call context is being displayed in case of Outbound calls where the phone number is being displayed in case of manual dial calls.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
10. **Customer Call Status:** It shows the status of the call of the customer.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
11. **Working Mode:** It shows the selected working mode by the agents. Know more...It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
12. **Queue:** It shows the name of queue in which the Outbound call has arrived. Even if the agent has been assigned in the multiple queues, still the name of that queue will be displayed in which the agent is connected to the customer.It shows the current data. The Data Refresh Interval on the User Interface is maximum 5-10 seconds.
13. **Agent Availability:** The status of agent is shown with the agent's name in the form of green  or red  circle(here "a1" and "a2" are the agent names). If the status of agent is available then the green circle starts showing with the agent's name and if the agent is status is unavailable or the agent is on break then the status of the agent shows with red mark. Through this feature, the supervisor can easily recognize that whether the agent is available or not.
14. **Group Manager:** It shows the name of the group manager under which the agent is assigned into.

15. **Groups:** It shows the name of the groups in which the agent is assigned into.
16. **Table Filters:** It shows the name table filter name when the masking feature is enabled.

> The status of agent will show only when the agent logged-in to the Ameyo and till the time agent do not logged off his profile.

> If any agent is on call through Dial User App, then the metrics like Call TYpe, Phone, Customer Call Status, and Queue in Agent List will remain blank. However, the Agent Call Status should remain "Connected".



Agent Name	Agent Id	Auto Call Status	Agent Status	Call Context	Extension	Agent Call Status	Call Type	Phone	Customer Call Status	Queue
Bart	Bart	On	Available 00:13:15	1111	4564565	Connected 00:00:18				
Boone	Boone	On	Available 00:07:32	1111	45645	Connected 00:00:17				

Threshold Alerts (Licensable)

Supervisors can configure time limits for specific activities. If breached, the agent's row changes color.

- **Configure:** Click **Configure Threshold** > Enter limits for Hold, ACW, Call Duration, or Break Reasons > Click **Apply**.
- **Types:**
  - **Hold Time Breached:** Customer held too long.
  - **ACW Time Breached:** Wrap-up time exceeded.
  - **Call Duration Breached:** Total interaction time exceeded.
  - **Break Duration Breached:** Specific break type limit exceeded.

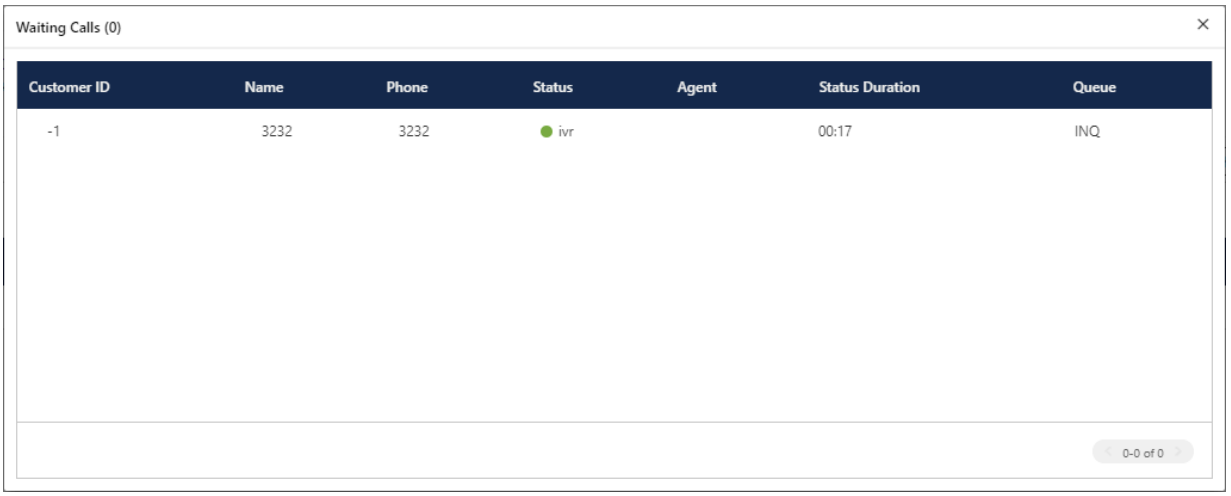
Live Call Operations (Floating Window)

Clicking on an agent's row opens a floating window with session details and control buttons:

Operation	Description
Snoop	Listen to the call silently. Neither agent nor customer can hear you.
Whisper	Speak to the agent. The customer cannot hear you.
Conference	Join the call as a third party. All parties hear each other.
Barge	Take ownership of the call. The Supervisor's CRM opens, and the agent is muted.
Disconnect	Forcefully end the call for both parties.
Force Logout	Log the agent out of the system (Reason required).
Auto Dial Toggle	Enable/Disable auto-dialing for a specific agent (requires uploaded leads).

Additional Tools

- [ ] **Waiting Calls:** View a list of customers currently waiting to be answered, including their status duration and queue.



The opened pop-up contains the following columns.

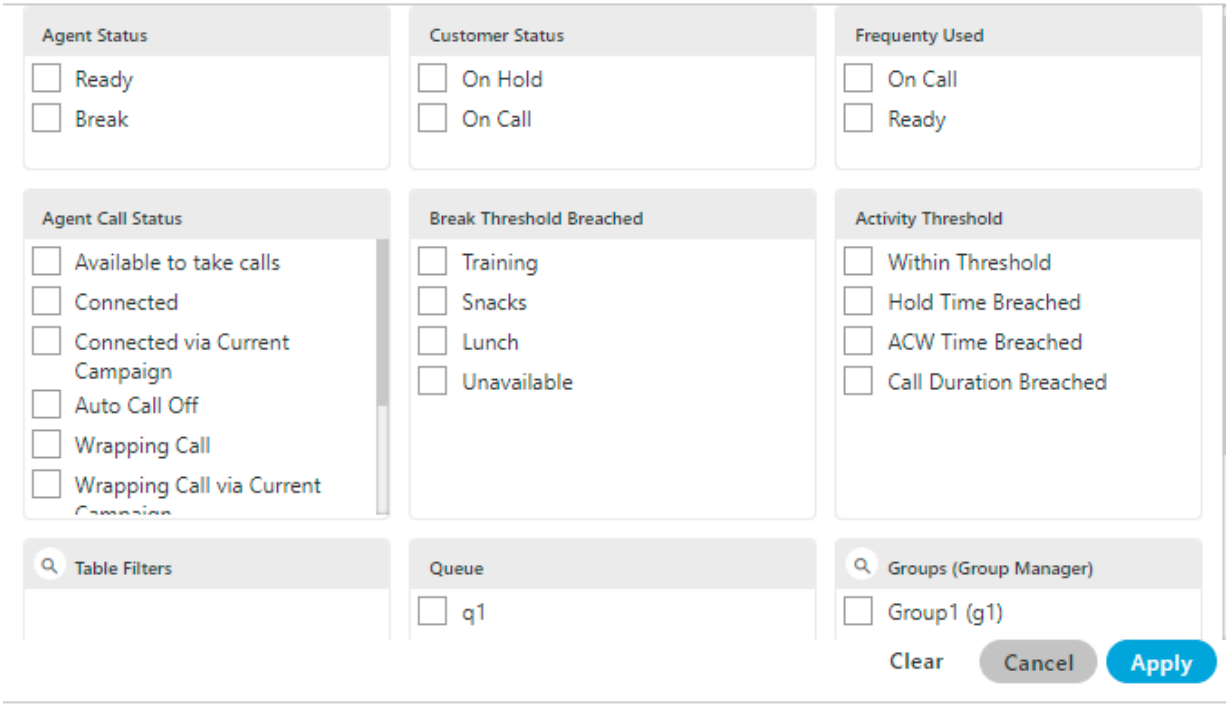
1. **Customer Id:** It shows the id of the registered customer. If the customer is not registered, then it shows "-1" as customer id.
2. **Name:** It shows the name of the customer, if registered. If the customer is not registered, then it shows the extension name from which the call is coming.
3. **Phone:** It shows the phone number of the customer.

4. **Status:** It shows the status of the call in which it is currently present.
5. **Agent:** It contains the agent name to whom the call is going to assign. If there is no agent free at the time of call, it shows blank as agent name.
6. **Status Duration:** It shows the total time of the call which is spent by the call before assigning it to any of the agent.
7. **Queue:** It shows the name of the queue in which the call has been assigned or landed.

- [ ] **Freeze/Unfreeze:** Pause the dashboard to analyze a snapshot of data without updates.

- [ ] **Filters:** Use the **Filter Icon** to search agents by Status (Ready/Break), Call Status (Connected/Wrapping), or Threshold Breaches.

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



The supervisor can select the single or multiple filters from the following list.

1. **Customer Status** : The supervisor can select the status of the customer either the customer is on the call or on the Hold.
    - **On Call** : It means that the agent is on the call with the customer.

- **On hold** : It means that the agent is either not active on the call or the agent put the customer's call on hold.

2. **Frequently Used** : It shows the frequently used filters which are used by the supervisors mostly.
3. **Agent Status:** It filter the agents based on the status of their work, that is, whether the agent is ready or is on the break. It contains the following options.
    - Ready: It shows the agents who are ready to attend the calls.
    - Break: It shows the agents who are on break.If the agent is automatically set on "Auto Available" just after the logon, then the break count will be increased by 1.
4. **Agent Call Status** : The supervisor can filter the status of the agents from the following status.
    - **Available to take calls** : It means that the agent is free and available to take the next call.
    - **Connected** : It means that the agent is connected with the campaign and also selected the extension.
    - **Connected via current campaign** : It filters the agents of the selected campaign.
    - **Auto Call Off** : It shows that the agent is not on the auto call or the auto call for those agents are off.
    - **Wrapping Call** : It filters for those agents who are wrapping-up their calls or agents who are disposing off their calls.
    - **Wrapping Call via current campaign** : It filters for those agents who are wrapping-up their calls with the current campaign with which the supervisor is logged-in at the same time.
5. **Activity Threshold** : It allows the supervisor to filter for those call which are in the various threshold range. It contains the following parameters which can be used to filter the list.
    - **Within Threshold:** It filter the list of those agents which are lying in the threshold limit set by the administrator.
    - **Hold Time Breached:** It filters the list of those agents who breached the hold time limit set by the administrator.
    - **ACW Time Breached:** It filters the list of agents who breached the time limit to dispose off the call which is set by the administrator.

- **Call Duration Breached:** It filters the list of agents who breached the limit of Call duration which is set by the administrator as well.

6. **Break Threshold Breached** :The supervisor can search those users whose status is on break and the break time configured by the supervisor has already been breached. It contains all the break reason which are configured in the system by the administrator.
7. **Queue** : The supervisor can filter for particular agents which are assigned in the particular queue.

Working Mode Selection Monitoring

Due to the covid-19 pandemic situation, all organizations were operating from home. But, after restoration of situations, the organizations started mixed mode of working, where some agents started working from office and some of the agents are working from home. In such scenarios, the work of supervisor to monitor the agents is increased, as the supervisor would want to know the agent's working mode. This will help the supervisor to know how to communicate with the agent. Thus, to provide the better agent monitoring, the working mode selection functionality has been provided to the agents, which a supervisor is also able to view.

Thus if the working mode selection is available/configured for the agents, then a data metric column will be available to the supervisor in the Agents List section. It will show the selected working mode by the agent. The following two working mode selection is present:

1. **WFO (Work from Office):** The agents who are working from Office, have to select this working mode option.
2. **WFH (Work from Home):** The agents who are working from home, and is enabled with Ameyo remote solution, have to select this working mode option.

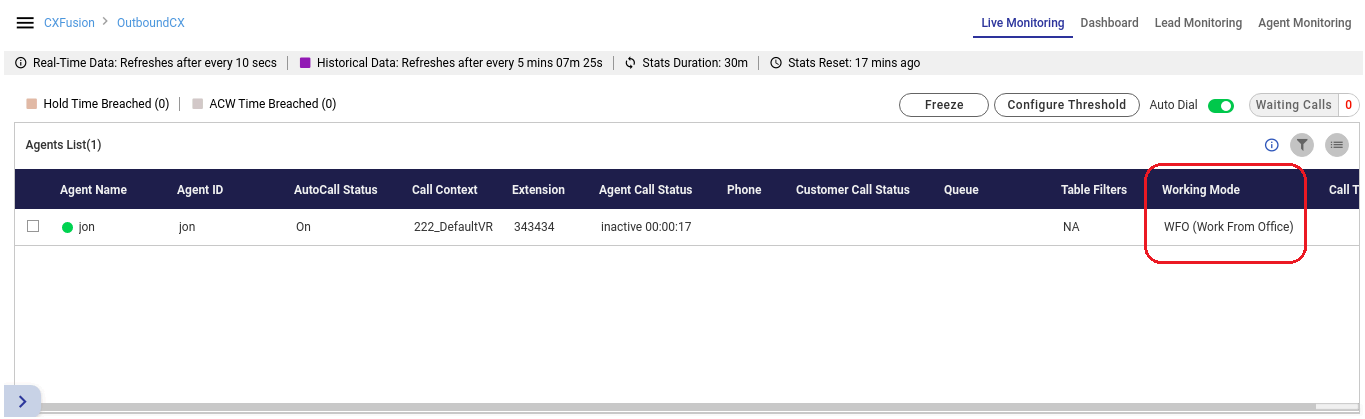
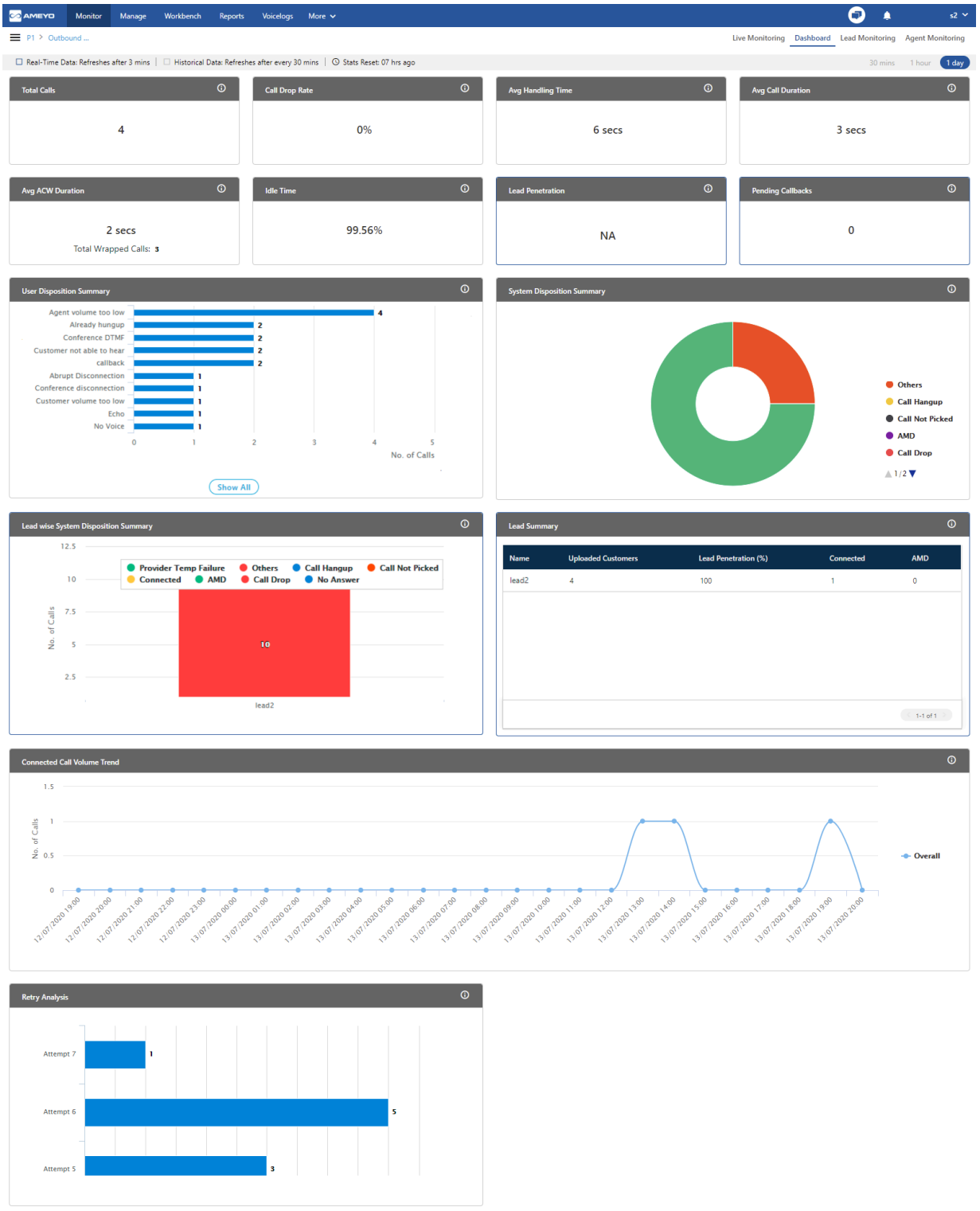


Figure: Monitoring of Selected Working Mode

19.2.4.2.2. Dashboard of Outbound Campaign

The dashboard tab of Outbound campaign shows the following items.

- Data Collection Indications
- Time Duration
- Call Details
- User Disposition Summary
- System Disposition Summary
- Lead wise System Disposition Summary
- Lead Summary
- Connected Call Volume Trend
- Retry Analysis



Data Collection Indications

On top, a horizontal bar shows the indications of different data collection intervals.

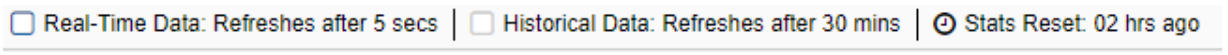


Figure: Data Collection Indications

- **Real-Time Data:** The Data Metrics, whose data is refreshed after 5 seconds, then it will be indicated with the border of blueish color .
- **Historical Data:** The Data Metrics, whose data is refreshed after every 5 minutes, then it will be indicated with the border of black color .
- **Stats Reset:** It informs the interval after which the statistics were reset last.

Time Duration

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

- **30 minutes:** Click to view the activities in the selected campaign for the last 30 minutes.This tab shows the data of the last 30 minutes. The Current Data on the User Interface will be updated in maximum 8 minutes, whereas the historical data will be updated in maximum 38 minutes.
- **1 hour:** Click to view the activities in the selected campaign for the last one hour.This tab shows the data of the last 1 hour. The Current Data on the User Interface will be updated in maximum 8 minutes, whereas the historical data will be updated in maximum 38 minutes.
- **1 day:** Click to view the activities in the selected campaign for the present one day starting from 00:00 hour.This tab shows the data of the last 1 day. The Current Data on the User Interface will be updated in maximum 1 hour 3 minutes, whereas the historical data will be updated in maximum 1 hour 33 minutes.

Call Details

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

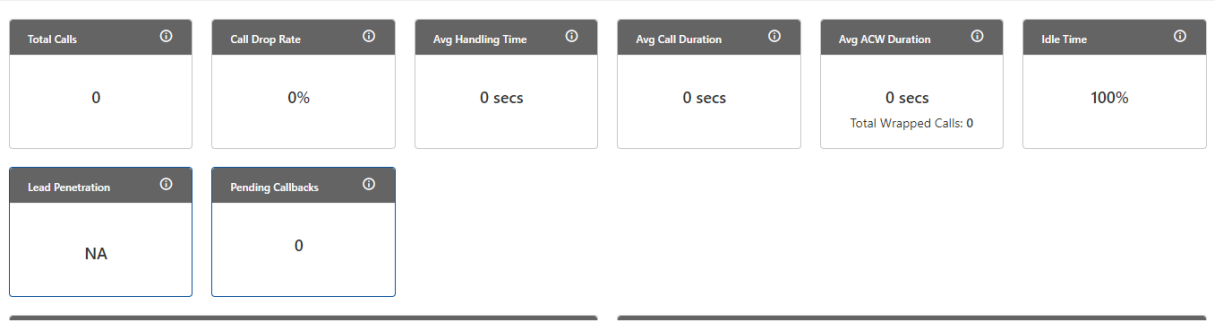


Figure: Call Details

It contains the following widgets:

1. Total Calls
2. Call Drop Rate
3. Avg Handling Time
4. Avg Call Duration
5. Avg ACW Duration
6. Idle Time
7. Lead Penetration
8. Pending Callbacks

- **Total Calls**

It shows the total number of calls of the following call types in the campaign.

- inbound.call.dial
- outbound.auto.dial
- outbound.callback.dial

- outbound.auto.preview.dial
- outbound.manual.preview.dial
- transfer.to.campaign.dial
- outbound.manual.dial
- click.to.call.dial

Total Calls does not show any other call type.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Total Calls".



Figure: Further Information for Total Calls

- **Call Drop Rate**

It shows the call drop, which is the percentage of calls that were disconnected before reaching to the agent.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Call Drop Rate".



Figure: Further Information for Call Drop Rate

Enumeration Example:

In a Predictive Algorithm based Auto-Dialing, the customer call leg is being connected first and then the agent call legs will be connected.
If the system throws 10 calls and there only 6 agents to attend the calls. Now, 6 calls will be connected with 6 agents.

Total Calls = 10

Connected Calls = 6

Customer disconnected the calls before connecting with the agents = 4 (These calls are disposed of with “CALL_DROP” system disposition).

Call Drop Count = 4

Call Drop Ratio = 4/10 = 40%

It is configurable through the backend that after modifying system_configuration_parameter, Call Drop Count will also depend upon the System Dispositions such as CALL_HUNGUP and CALL_NOT_PICKED.

Avg Call Duration

It shows the average time taken by the agents on a call speaking to the customer.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Call Drop Rate".



Figure: Further Information of Average Call Duration

Enumeration Example:

1. On Call 1, Agent1 has talk time of 20 seconds on one call, out of which Agent1 has put the Customer on hold for 10 seconds.

2. On Call 2, Agent1 has talk time of 30 seconds on second call, out of which Agent has put the Customer on Hold for 15 seconds.
3. On Call 3, Supervisor has talk time of 20 seconds on one call, out of which, Supervisor has put the customer on hold for 10 seconds..
4. On Call 4, Supervisor has talk time of 30 seconds on another call, out of which, Supervisor has put the Customer on hold for 15 seconds.

Average Call Duration = [(Total Talk time of all agents) + (Total Hold Time of all agents)] / Count of all calls in Campaign

Average Call Duration = [(20+30+20+30) + (10+15+10+15)] / 4

Average Call Duration = [100 + 50] / 4

Average Call Duration = 150 / 4

Average Call Duration = 37.5

Idle Timeis applicable only for Single Extension in Voice. It is not available for Chat Campaign, Interaction Campaign, and Voice with Multiple Extensions.

Idle Time for an agent in a campaign	=	Ready	–	Agent Ringing Time for all calls taken by this agent in this campaign + Agent Preview Time for all calls taken by this agent in this campaign + Customer Ringing Time (in case the customer is initiated after the agent) + Customer Setup Time (in case the customer is initiated after the agent) + Agent Talk Time for all calls taken by this agent in this campaign + Agent Customer Hold Time for all calls taken by this agent in this campaign + Agent ACW Duration for all calls taken by this agent in this campaign

Idle Time will be a campaign-level metric, that is, it will be calculated differently for each campaign. If an agent have selected multiple campaigns and handling all calls in one

campaign only, then its Idle Time will be equal to the Ready Duration in other campaigns.

Limitation of Multiple Extension

If the Multiple Extension license is enabled, then the Idle Time will be neither displayed in the User Interface nor included in Reports. In case of multiple license, the following disclaimer will be displayed in the Agent Productivity Summary Report.

"Feature should work on the multiple extension - data may be wrong."

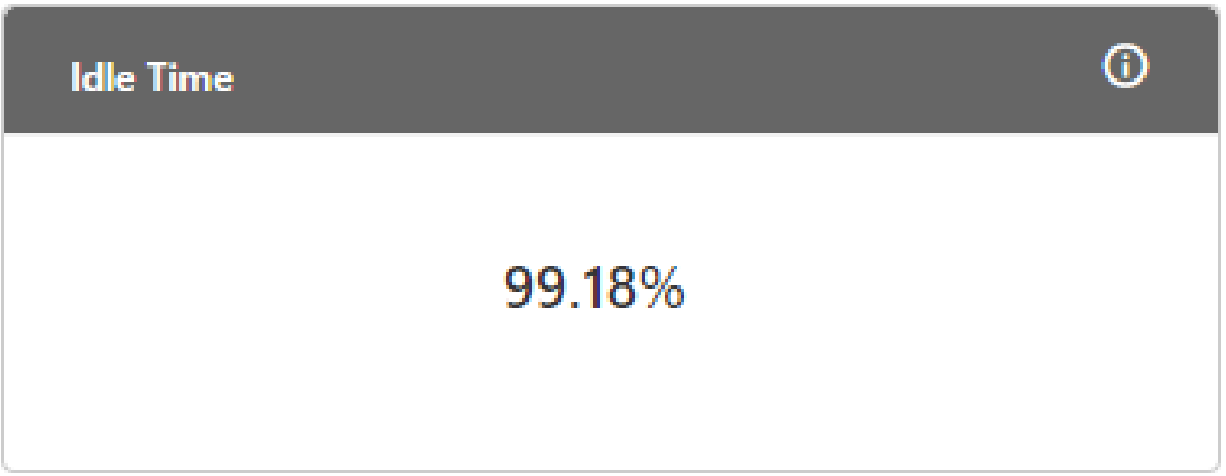


Figure: Idle Time Widget

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Idle Time".



Figure: Further Information of Idle Time

Avg ACW Duration

It is the average of all ACW durations spent by the users on the calls in this campaign.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Average ACW Duration".



Figure: Further Information of Average ACW Duration

Total Wrapped Calls

It displays the calls wrapped by all agents in the Campaign.

Enumeration Example:

There are following 6 calls in the campaign.

1. Agent disposed of one call while talking to the agent. ACW Duration will be 0 in this case.
2. Agent have disposed of one call in 15 seconds.
3. Agent have disposed of one call in 20 seconds.
4. One call was wrapped automatically as the pre-configured call wrap-time of 30 seconds was exceeded.
5. Agent have transferred one call to another campaign and it took 15 seconds to dispose of the call in Campaign 1.
6. One call is attended by User1 who transferred it to User2. User1 took 10 seconds to wrap the call and User2 took 15 seconds to wrap the call.

Average ACW Duration = (Total ACW Duration) / (Number of Calls)

Average ACW Duration = (0+15+20+30+15+10+15) / 6

Average ACW Duration = 105 / 6

Average ACW Duration = 17.5 seconds

Avg Handling Time

It shows the Average Handling Time of all connected calls with users in campaign. It is the sum of Customer Talk Time for this agent, Customer Hold Time for this agent, and Wrap Time of Connected Calls. It includes only Customer Interactions, but Dial User (Internal Calls) are not included.

$$AHT = \frac{\text{Customer Talk Time} + \text{Customer Hold Time} + \text{Wrap Time of Connected Calls}}{\text{Total Connected Calls}}$$

Figure: Calculation of Average Handling Time

AHT does not include the Average Wrap Time of an agent as the Average Wrap Time will also include the wrapping of not connected calls.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Average Handling Time".



Figure: Further Information of Average Handling Time

Enumeration Example:

- Inbound Calls in Campaign but not reached to ACD = 2
- 1 Inbound Call connected to user1
  - Talktime = 50,000 milliseconds
  - Hold time = 30,000 milliseconds
  - Wrap time = 20,000 milliseconds
- 1 Manual Dial Call connected to user1, who transferred it to user2.
  - Talk time = 45,000 milliseconds (as dumped in Call History Table for this call)

- Hold time = 30,000 milliseconds (as dumped in Call History Table for this call)
- Wrap time of user1 = 15,000 milliseconds
- Wrap time of user2 = 18,000 milliseconds

Average Handling Time =	= {(50000+30000+20000) + (45000+30000+15000+18000)} / 2 = (1,00,000 + 1,08,000) / 2 = 2,08,000 / 2 = 1,04,000 milliseconds = 104 seconds = 1 minute 44 seconds

Lead Penetration

It shows the lead penetration of a lead that has minimum percentage of phone numbers attempted by the dialer.
All leads (enabled, disabled, and Attempt Failed) are considered. The Churning does not reduce the penetration rate. The migration of phone numbers from one lead to another will impact the lead penetration metric of both leads.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Lead Penetration".

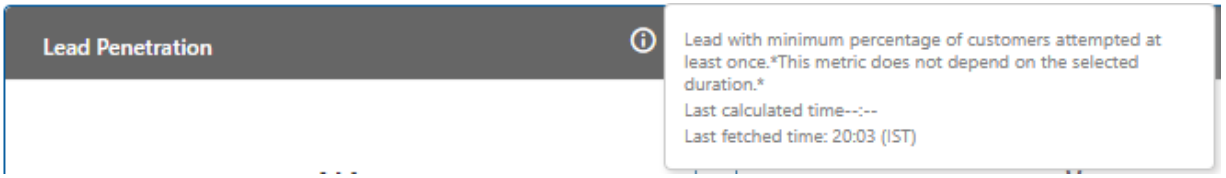


Figure: Further Information of Lead Penetration

Pending Callbacks

It shows the number of callbacks pending in the selected duration tab.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Pending Callbacks".

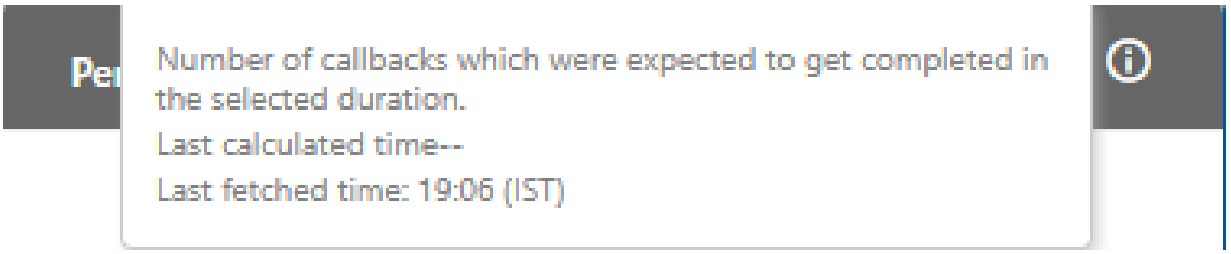


Figure: Further Information of Pending Callbacks

User Disposition Summary

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

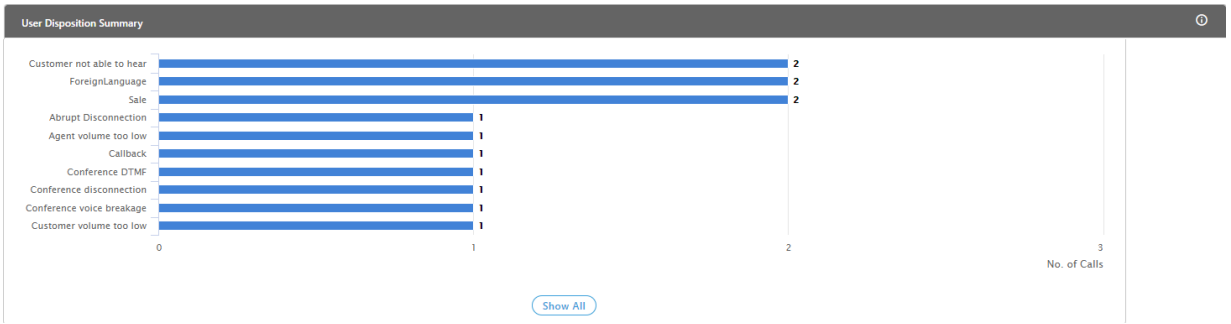


Figure: User Disposition Summary Graph

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, it shows the disposition method, total number of calls and total number of calls received after being transferred from

another campaigns.

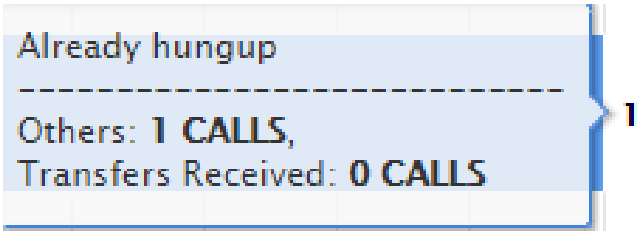


Figure: Disposition Graph

If there are more than 10 dispositions, then "Show ALL" button will appear in the graph. Click this button to see all the user dispositions. After clicking "Show All" button, the following wizard is displayed.

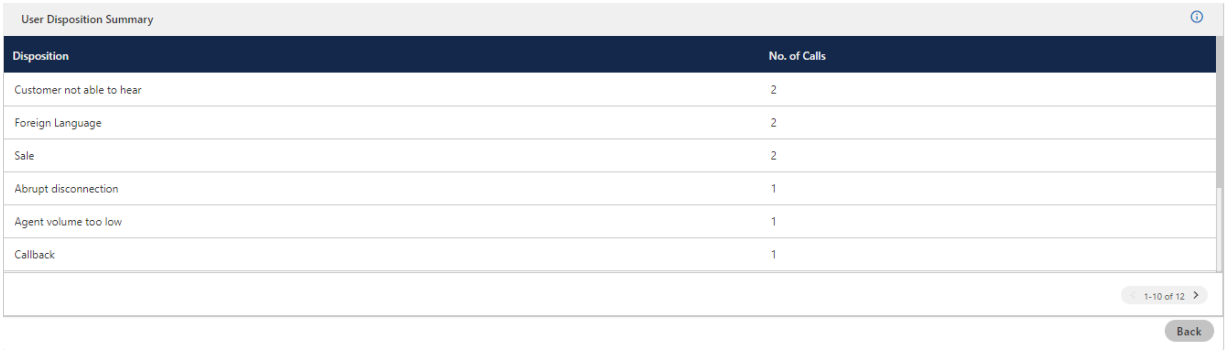


Figure: Disposition Graph List

The supervisor has to click > icon in  to see the next page of the user dispositions.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "User Disposition Summary".



Figure: Further Information of User Disposition Summary

System Disposition Summary

This doughnut pie chart shows the overall call distribution (in percentage) disposed with different system dispositions.

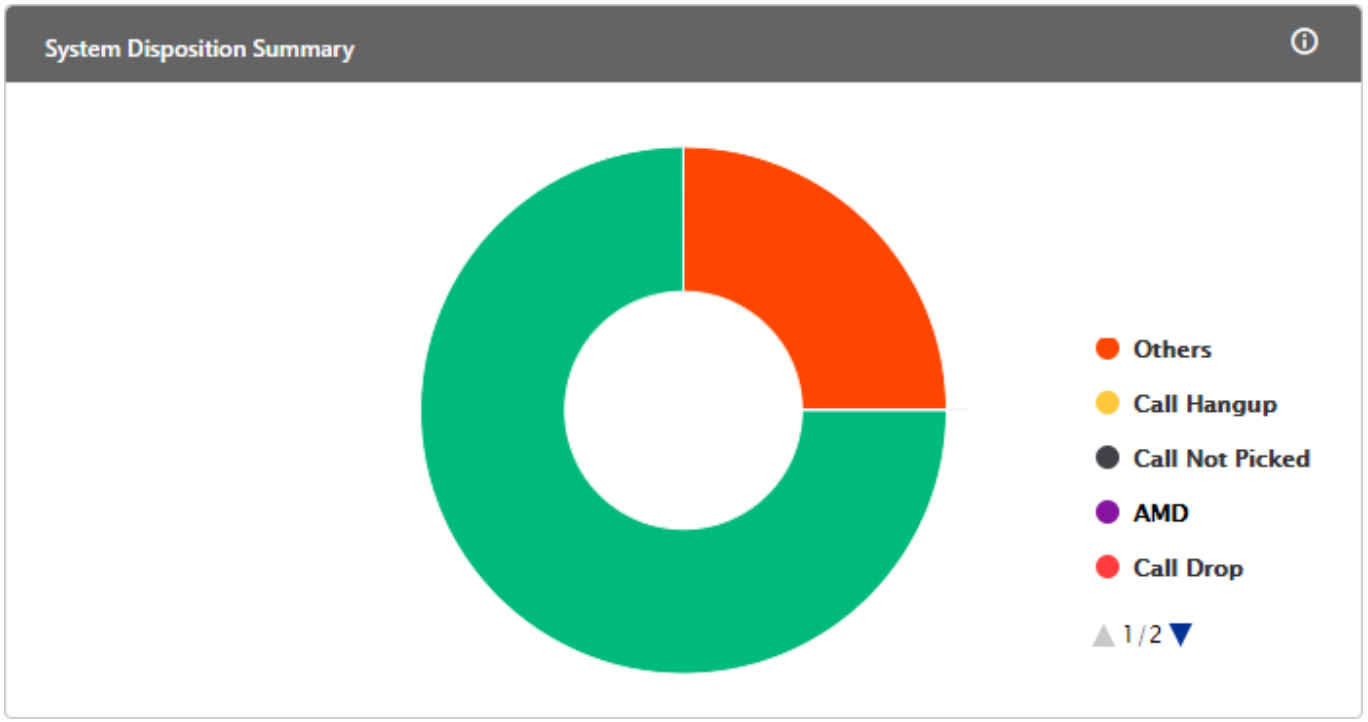


Figure: Call Distribution Graph

On hovering the mouse cursor on the bar of a disposition, the supervisor will be able to view the count of calls disposed of with this disposition.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "System Disposition Summary".



Figure: Further Information of System Disposition Summary

Lead wise System Disposition Summary

This bar graph shows the system dispositions for the phone numbers of the lead. It includes these dispositions: Provider Temp Failure, Call Hangup, Call not Picked Up, AMD, Call Drop, No Answer, Connected and others. All leads (enabled, disabled, and Attempt Failed) are considered. The Churning does not reduce the penetration rate. The migration of phone numbers from one lead to another will impact the lead penetration metric of both leads.

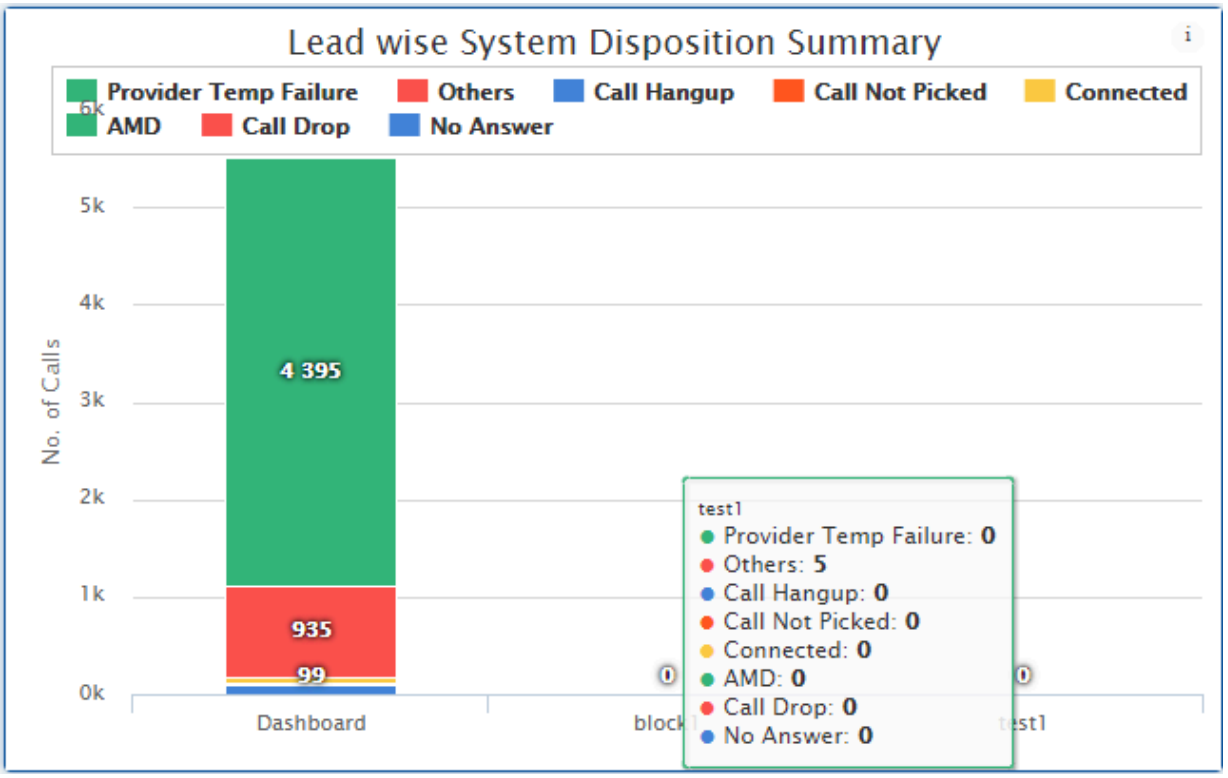


Figure: Lead-wise System Disposition Summary

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.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Lead-wise System Disposition Summary".

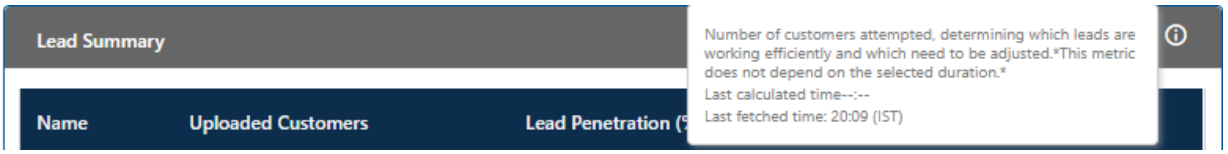


Figure: Further Information of Lead-wise System Disposition Summary

Lead Summary

Supervisor can view the performance of the leads enabled in the selected campaign. .

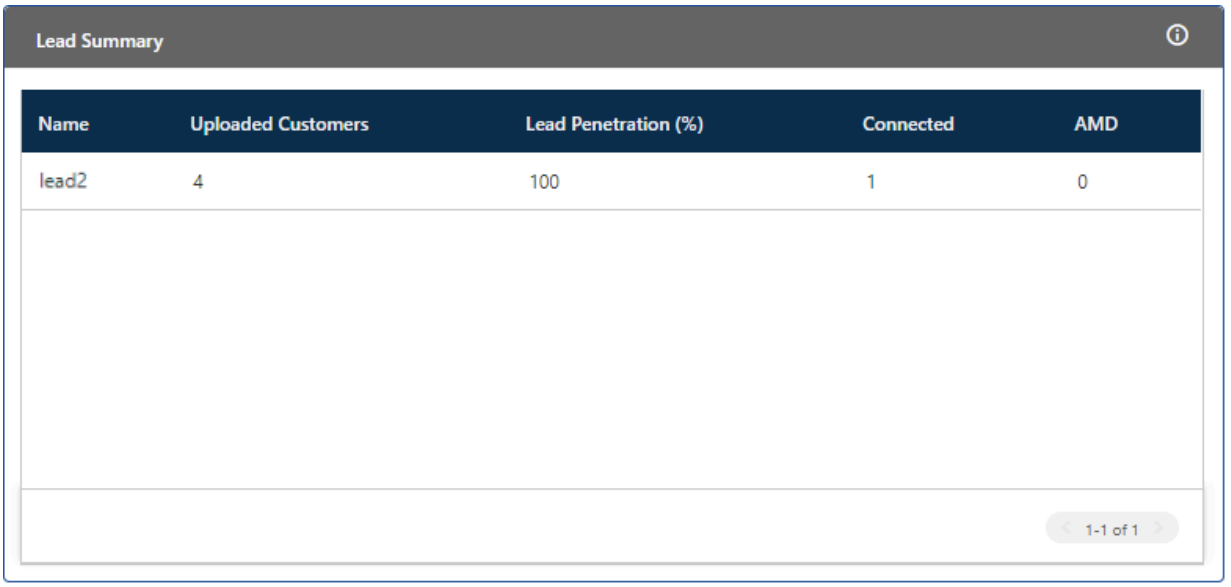


Figure: Lead Performance

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.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Lead Summary".



Figure: Further Information of Lead Summary

Connected Call Volume Trend

This line graph shows number of connected calls in a campaign with respect to different time intervals.

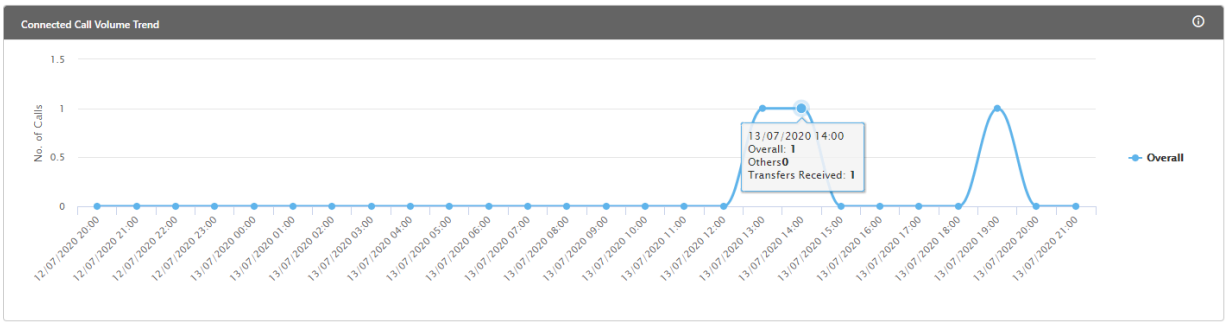


Figure: Trend of Call Volume

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.

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time of "Connected Call Volume Trend".

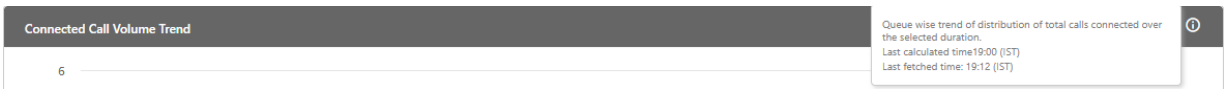


Figure: Further Information of Connected Call Volume Trend

Retry Analysis

This graph shows the number of retries for a particular system disposition and the number of phone numbers reached for these attempts. It includes Auto Dial, Auto Preview Dial, Manual Dial, and Manual Preview Dial. It does not consider Attempt Failed.

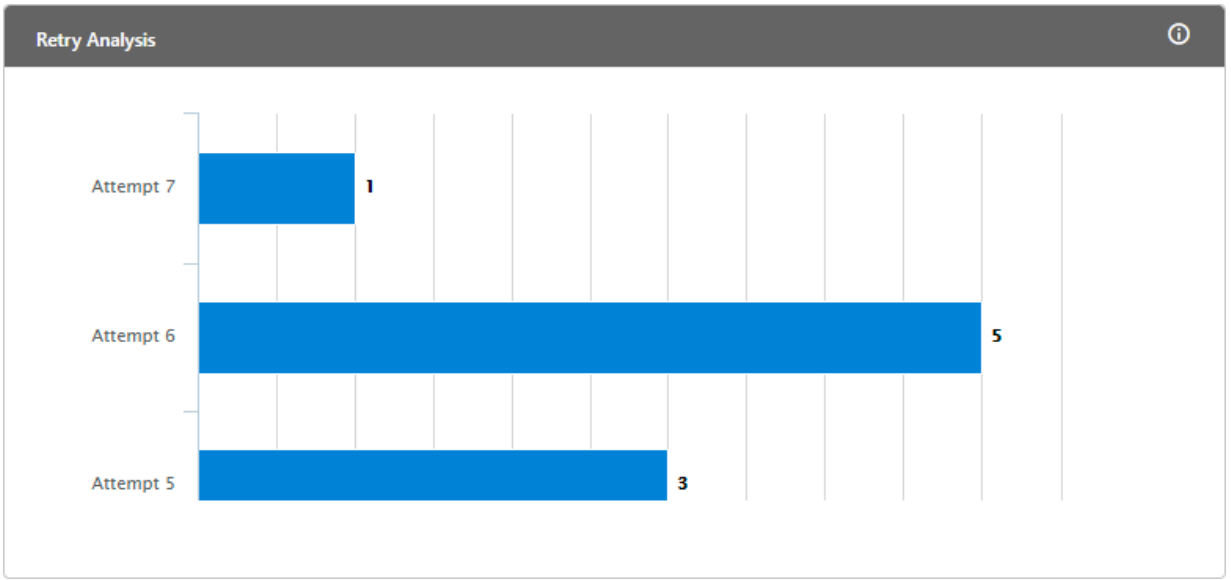


Figure: Retry Analysis

Additional Information:

Hover the mouse over icon to view the basic definition, last calculated time, and last fetch time for "Retry Analysis".



Figure: Further Information of Retry Analysis

19.2.4.2.3. 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**
4. **Manage Filter Groups (Licensable)**

19.2.4.2.4. Agent Monitoring in Outbound Campaign

This tab shows session details of agents of same day. Through agent monitoring tab, supervisor can take 360 degree glance on individual agents and can take cognizance of agent schedule, performance metrics, productivity data. And most importantly user can sort this data according to table headers.

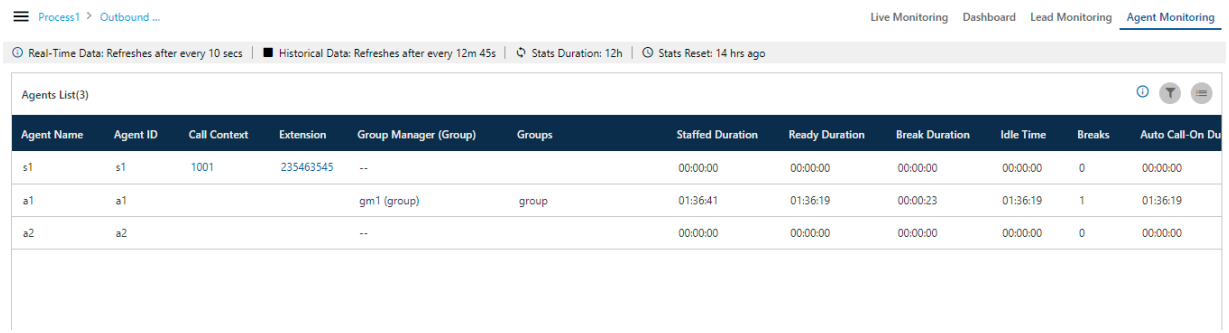


Figure: Agent Monitoring in Outbound Campaign

Interface Elements

You can perform the following operations here.

Data Collection Indications

On the top, a horizontal bar shows the indications of different data collection intervals.

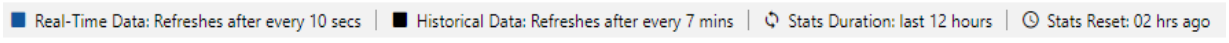


Figure: Data Collection Indications

- **Real-Time Data:** The Data Metrics, whose data is refreshed after 5 seconds, then it will be indicated with the border of blueish color.
- **Historical Data:** The Data Metrics, whose data is refreshed after every 5 minutes, then it will be indicated with the border of black color.

- **Stats Duration:** It informs about the time interval for which the statistics are showing on the page. Here, the time interval selected is the 12 hours.
- **Stats Reset:** It informs the interval after which the statistics were reset last.

Search

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

User Card

The supervisor can see the basic information of agents assigned in that campaign by hovering its mouse over the agents name.The user card is displayed while hovering the mouse on the user name of the user. Following screen is displayed while hovering the mouse over the username of the user.

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

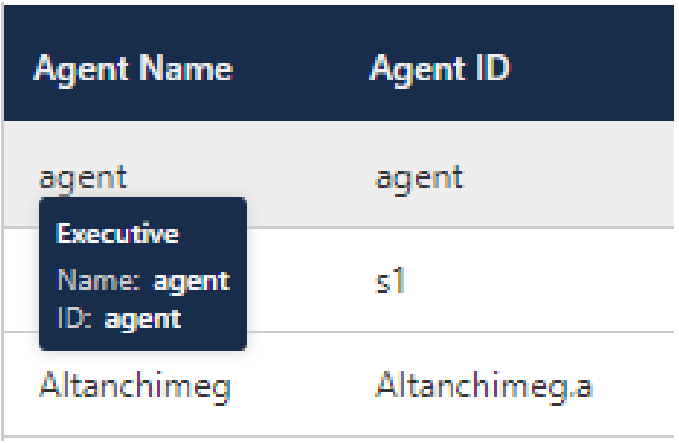


Figure: User Card

Customize the View

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

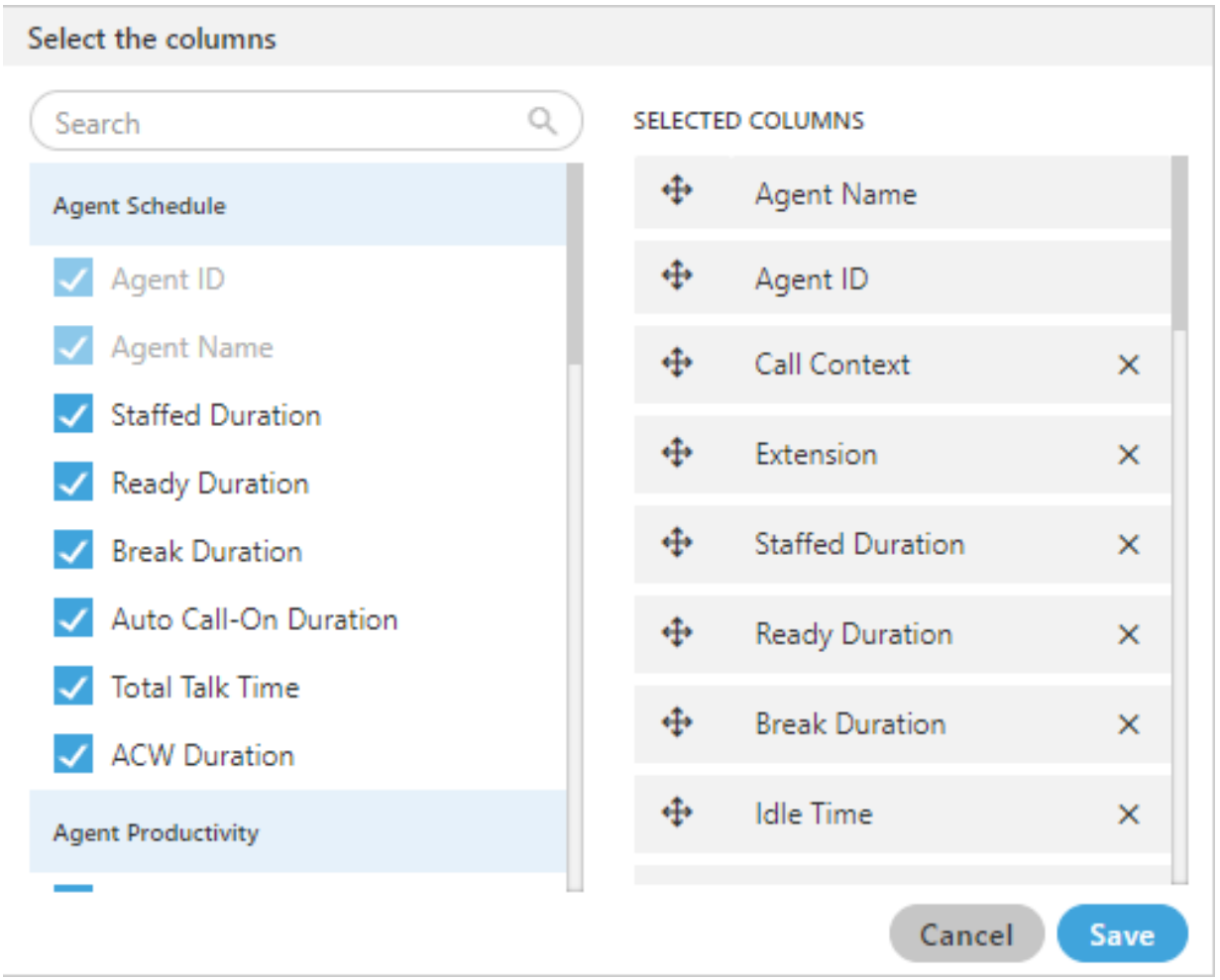


Figure: Column Headers

In the right part of the section, the user can click and hold icon and drag a column upward or downward to change the sequence of the columns in the table. The column on top will be displayed at the first position from the left. If some columns are mandatory to be displayed, then the user will not have the option not to select or deselect the colums.

Select the column headers that you want to display on the Agent Monitoring Page. It contains the following customizations.

1.Agent Schedule:

It contains the following columns which the supervisor can select from.

- **Call Context:** It shows the name of the call context selected by the agent. In case of multiple extensions with an agent, the only one call context will be visible. If the

agent changes the call context, then the row will be updated in maximum 2 minutes 35 seconds.The agent name may not be visible in any of the following cases.

- The Refresh Time is not reached.
- The agent has not selected the extension containing the selected call context.
- In the case of WebRTC, the call context name will be auto-generated.

The row will be visible after 5 minutes. It shows the current data and its maximum Data Refresh Interval is 2 minutes 35 seconds.

- **Staffed Duration:** It is the total time duration (that is the plus of the total ready time and the total break time) in which the agent has been assigned in the campaign for the last interval.
  Calculation :

$$\text{Staffed Duration} = \text{Total Ready Duration} + \text{Total Break Duration}$$

If the user has selected multiple campaigns, then only one campaign will be displayed here. Here, the time is being calculated as per a campaign. Therefore, the time spent by the user after the logon but before selecting a campaign will not be counted here.

It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.

- **Extension:** It shows the agent's phone numbers. In the case of multiple extensions, only the selected call context in one row will be visible. The local and endpoints will not be displayed here.
  The agent has been logged on to the system but its name may not be visible in any of the following cases.The row will be visible after 5 minutes. It shows the current data and its maximum Data Refresh Interval is 2 minutes 35 seconds.
  - The Refresh Time is not reached.
  - The agent has not selected the extension containing the selected call context.
- **Ready Duration:** It is the total ready duration of an agent in a campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in

maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.

- **Break Duration:** It is the total break duration of an agent.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
- **Breaks:** It shows the count of breaks taken by the agent staffed to this campaign.

  > If the agent is automatically set on "Auto Available" just after the logon, then the break count will be increased by 1.

- **Auto-Call on Duration:** It is the total duration when the agent is on auto-call on status.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.

2.Agent Performance:

It contains the following columns according to the various agent performances.

- **Total Talk-Time:** It is the total talk time of an agent for all calls in a campaign.It is the total talk time of an agent for all calls in a campaign. It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 32 minutes 35 seconds.
- **ACW Duration:** It is the total wrap time of an agent for all calls in a campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.
- **Avg Call Duration:** It is the average call duration for an agent in a campaign.It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.
- **Avg Handling Time:** It is equal to the sum of Customer Talk Time for this agent, Customer Hold Time for this agent, and Wrap Time of Connected Calls divided by the

total connected calls for this agent. It includes only Customer Interactions, but Dial User (Internal Calls) are not included.

Calculation :

$$AHT = \frac{\text{Customer Talk Time for this agent} + \text{Customer Hold Time for this agent} + \text{Wrap Time of Connected Calls}}{\text{Total Connected Calls for this Agent}}$$

> AHT does not include the Average Wrap Time of an agent as the Average Wrap Time will also include the wrapping of not connected calls.

It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.

- **Avg Hold Duration:** It is average hold time of an agent for customer calls in a campaign. It does not include the hold time on dial user (Internal Calls). It is equal to the total hold time divided by the count of customer calls with hold.

  Calculation:

$$\text{Average Hold Duration} = \frac{\text{Total Hold Duration}}{\text{Total Calls with the Hold}}$$

It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.

- **Avg ACW Duration:** It is the average of ACW Duration of an agent in a campaign. It is the total wrap-up time divided by all wrapped calls for an agent.

Calculation:

$$\text{Average ACW Duration} = \frac{\text{Total Wrap Duration}}{\text{Count of Wrapped Calls for the agent}}$$

It shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum

7 minutes 35 seconds.

3.Agent Productivity:

It contains the following columns according to the various productivity of the agent's calls.

> Note: The following paramters shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.

- **Connected Calls:** It shows the total calls answered by an agent in the campaign.
- **Connected Auto Dials:** It is the total number of auto dials connected to the customers in a campaign.
- **Connected Transfers:** It shows the total number of transferred calls received and connected in a campaign.
- **Connected Manual Dials:** It is the total number of manual dials connected to the customers in a campaign.
- **Connected Callbacks:** It is the total number of callbacks attended by an agent in a campaign.
- **Total Wrapped Calls:** It is the total number of calls successfully completed and wrapped by the agent in that campaign.

4.Disposition Code:

It contains the following columns of various disposition codes which the agent used while completing their calls.

> Note: The following parameters shows the data of the last 12 hours. The Current Data on the User Interface will be updated in maximum 2 minutes 35 seconds, whereas the historical data will be updated in maximum 7 minutes 35 seconds.

- **Foreign Language:** It is the total number of calls disposed in "Foreign Language" disposition.

- **Sale:** It is the total number of calls disposed in "Sale" disposition.
- **Callback:** It is the total number of calls disposed in "Callback" disposition.
- **Already Hangup:** It is the total number of calls disposed in "Already Hangup" disposition.
- **Abrupt Disconnection:** It is the total number of calls disposed in "Abrupt Disconnection" disposition.
- **Echo:** It is the total number of calls disposed in "Echo" disposition.
- **Customer Not able to hear:** It is the total number of calls disposed in "Customer Not Able to Hear" disposition.
- **Customer Volume Too Low:** It is the total number of calls disposed in "Customer Volume Too Low" disposition.
- **Agent Volume Too Low:** It is the total number of calls disposed in "Agent Volume Too Low" disposition.
- **Voice Breakage:** It is the total number of calls disposed in "Voice Breakage" disposition.
- **Conference Voice Breakage:** It is the total number of calls disposed in "Conference Voice Breakage" disposition.
- **Conference Disconnection:** It is the total number of calls disposed in "Conference Disconnection" disposition.
- **Conference DTMF:** It is the total number of calls disposed in "Conference DTMF" disposition.

Columns

It contains the following columns(the columns which are not covered in above section).

Agent Name

It shows the name of the agent.

The row will be visible after 5 minutes. It shows the current data and its maximum Data Refresh Interval is 2 minutes 35 seconds.

Agent ID

It shows the ID of the agent.

The row will be visible after 5 minutes. It shows the current data and its maximum Data Refresh Interval is 2 minutes 35 seconds.

Group Manager

It shows the ID of the group manager under whom the agent is assigned into.

Groups

It displays the group name in which the agent is assigned.

19.2.4.3. Monitor Chat Campaign

19.2.4.3.1. Live Monitoring for Chat Campaign

The Live Monitoring screen for the Chat Campaign features several monitoring widgets/graphs

Graphs & Metrics

Metric	Data Point	Description
Users	Users Assigned, Users LoggedIn.	Total count of users assigned and logged on to this campaign.
Chats Queued	Count of Queued Chats.	Shows the count of chats that are queued.
Chats Per User	Average count of chats per user.	Number of connected chats per number of agents who have **Auto Chat** status on.
Auto Chat	Auto Chat ON, Auto Chat OFF.	Count of users who have their **Auto Chat** status turned on or off for receiving chats automatically.
Chat Instances	Total Available Instances, Total Occupied Instances.	Shows the count of chat instances that are available and occupied.

View Live Chats - Sections

The bottom section displays the live chats in three tabs.

Note: Ongoing Chats refers to chats that are currently live and in communication between the customer and agents.

Tab	Description	Sorting
Active Chats	Shows all chats that are currently active in the entire campaign.	Default Sort (max chat elapsed time first), Elapsed Time (Descending), User Name (Ascending).
Active Chats (Per Agent)	Shows the active chats per agent.	Default Sort (max chat elapsed time first), User Name (Ascending), No. Of Ongoing Chats (Descending), No. Of Ongoing Chats (Ascending), Show Only Users With Ongoing Chats.
Queued Chats	Shows the chats that are waiting in the entire campaign queue.	Default Sort (default order of requesting time), Requesting Time (Ascending), Requesting Time (Descending).

19.2.5. Manage Tab Introduction

The **Manage** tab in the Exotel–Ameyo Admin Console enables administrators and supervisors to efficiently manage users, queues, workflows, and associated configurations from a single interface. It serves as the control hub for daily operations—allowing you to add, edit, or deactivate users, organize agent groups (queues), and define access roles and privileges to ensure streamlined contact center management.

Interface Overview

The **Manage Tab** is organized into key sub-sections:

Left Navigation Section: This is a fixed sidebar on the left that allows you to navigate through various **processes and campaigns**. If the sidebar is hidden, click the menu icon to reveal it. When it's visible, click the "X" to close it. Within this panel, you can choose any of the assigned processes and campaigns.

Tabs: Tabs appear in the top right corner, allowing you to switch between the different selected campaigns.Manage Inbound Campaign

Manage Inbound Campaign

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

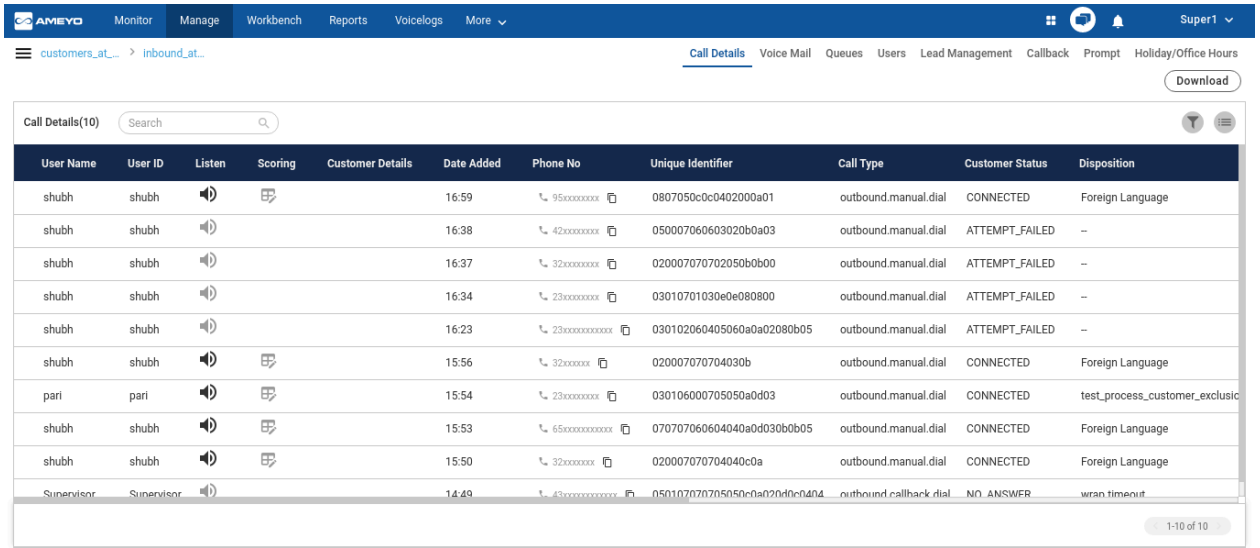


Figure: Manage Inbound Campaign

It contains the following tabs:

Section	Description
Call Details	Here, the Supervisor can view the call details/history of calls happened in the selected inbound campaign basis mutiple search filters.
VoiceMail	The Supervisor can access the Voice Mails left by the customers when the customer was not attended because of any reason
Queues	Create and configure queues for inbound and outbound routing. Organize agents into logical teams for supervision and reporting.
Users	Add, modify, and manage agent in campaigns
Lead Management	
Callback	The supervisor can add and manage the callbacks
Prompt	The supervisor can manage the prompts that are played on the IVR
Holiday/Office Timings	The supervisor can manage the Holiday Configuration and Office Hour Configuration.

Manage Onbound Campaign

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

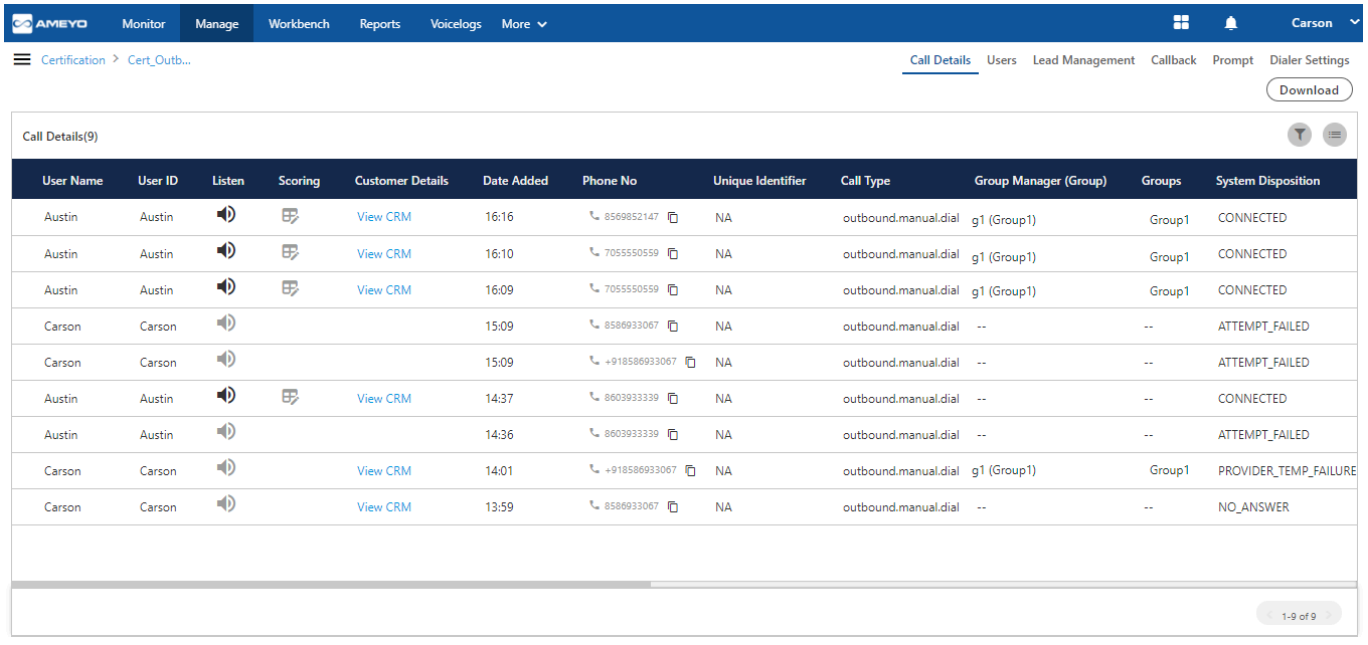


Figure: Manage Outbound Campaign

It contains the following tabs:

Section	Description
Call Details	Here, the Supervisor can view the call details/history of calls happened in the selected inbound campaign basis mutiple search filters.
Users	Add, modify, and manage agent in campaigns
Lead Management	
Callback	The supervisor can add and manage the callbacks.
Prompt	The supervisor can manage the prompts that are played on the IVR
Dialer Settings	
Holiday/Office Timings	The supervisor can manage the Holiday Configuration and Office Hour Configuration.

Manage Call Details

1. Click **Manage** → **Users**.
2. Select **Add User** to create a new agent or supervisor.
3. Enter user details such as Name, Email, Role, and Assigned Queue.
4. Click **Save**.

Additional Actions:

- Edit user information using the **Edit** icon.
- Deactivate or delete users if no longer required.
- Reset passwords or regenerate login credentials as needed.

> *From ECC v6.x onward*, users can be managed via **User Management API** for bulk updates and SSO synchronization.

Manage Queues

1. Go to **Manage** → **Queues**.
2. Click **Create Queue** to define a new service or campaign queue.
3. Assign agents, define maximum waiting time, and configure routing (Skill-based, FIFO, LWA).
4. Map queue to the appropriate **Flow** or **IVR Node**.

Key Parameters:

- **Queue Type:** Inbound / Outbound
- **Routing Strategy:** FIFO, Skill-based, or Longest Wait Agent
- **Estimated Wait Time:** Enable to announce EWT to callers (XPro, XTRM only)
- **Callback Option:** Allow customers to request a callback

Manage Roles and Permissions

1. Select **Manage** → **Roles & Permissions**.
2. Click **Add Role** to define new access profiles.
3. Choose feature access such as **Reports**, **Call Logs**, **Agent Monitoring**, or **Flow Designer**.
4. Assign the role to desired users or teams.

Default Roles:

- **Admin:** Full access including configurations
- **Supervisor:** Real-time monitoring, agent assignment
- **Agent:** Limited to assigned campaigns and queues

Manage Teams and Groups

1. Navigate to **Manage** → **Teams / Groups**.
2. Click **Add Group** and specify a name and description.
3. Assign users and queues to each group.
4. Use **Hierarchical Monitoring** to allow supervisors to manage sub-teams independently.

Tip:

Hierarchical supervision enhances accountability and simplifies escalations within large contact centers.

Validation / Troubleshooting

Issue	Possible Cause	Resolution
User unable to log in	Incorrect role or inactive status	Verify user activation and role assignment under **Manage → Users**
Queue not visible in agent login	Queue not mapped to flow	Go to **Call Flow Designer** and link queue
Access denied error	Role permissions misconfigured	Review **Roles & Permissions** settings

Best Practices / Notes

- Regularly audit user roles and permissions for compliance.
- Use **User Management API** for large-scale updates in ECC environments.
- Leverage **Skill-based Routing** and **Estimated Wait Time** to improve customer experience.
- Supervisors should monitor real-time queue load using the **Monitor Tab** for operational efficiency.

Feature Availability

Capability	XPrime	XPro	XTRM
User / Queue Management	✔	✔	✔
Role-based Access Control	✘	✔	✔
Hierarchical Monitoring	✘	✔	✔
API-based User Management	✘	✔ (Add-on)	✔

✔ Applies to: **XPrime, XPro, XTRM**

19.2.5.1. Manage Inbound Campaign

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

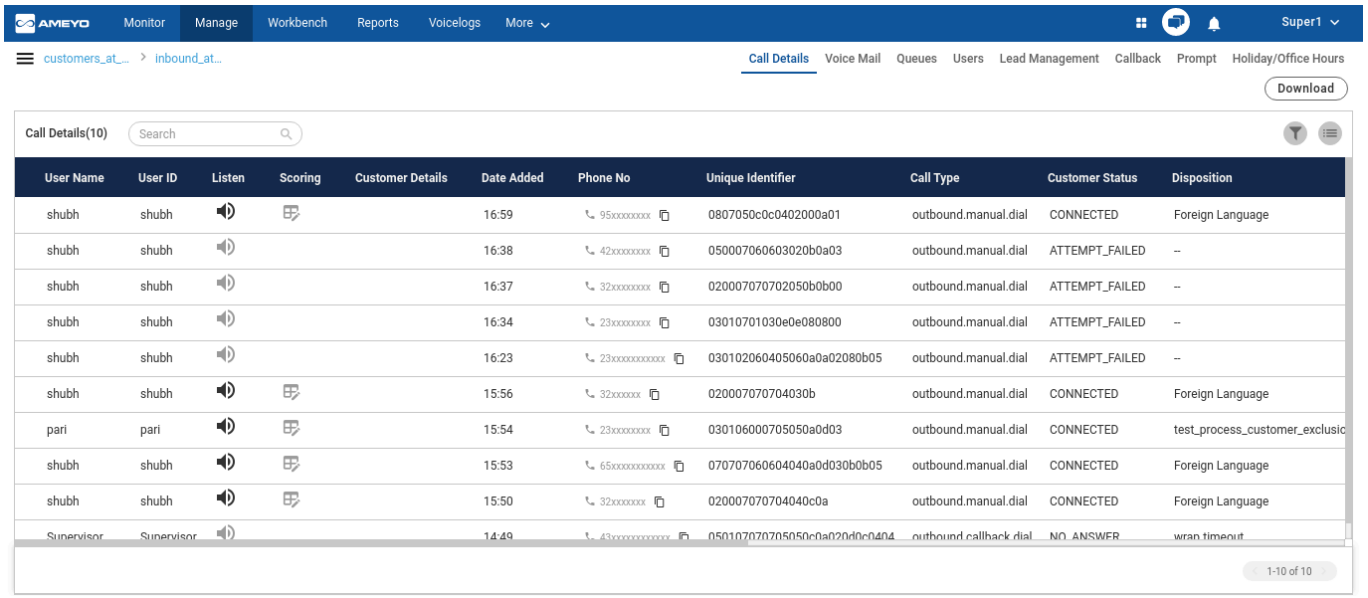


Figure: Manage Inbound Campaign

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. 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...
- **Holiday/Office Hour Configuration:** Here, the Supervisor can manage the Holiday Configuration and Office Hour Configuration. Please refer to "Holiday/Office Hour Configuration" Page of "Chat Campaign". Know more...

19.2.5.1.1. Call Details

"Call Details" tab shows call details or history of the last 200 calls on a 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 individually listen, recordings can be downloaded, and whole call data can be extracted to CSV. It also displays the numbers masked as per the Replacement Masking Policy.

> The tab will remain blank until you select the Date Range filters and apply them.

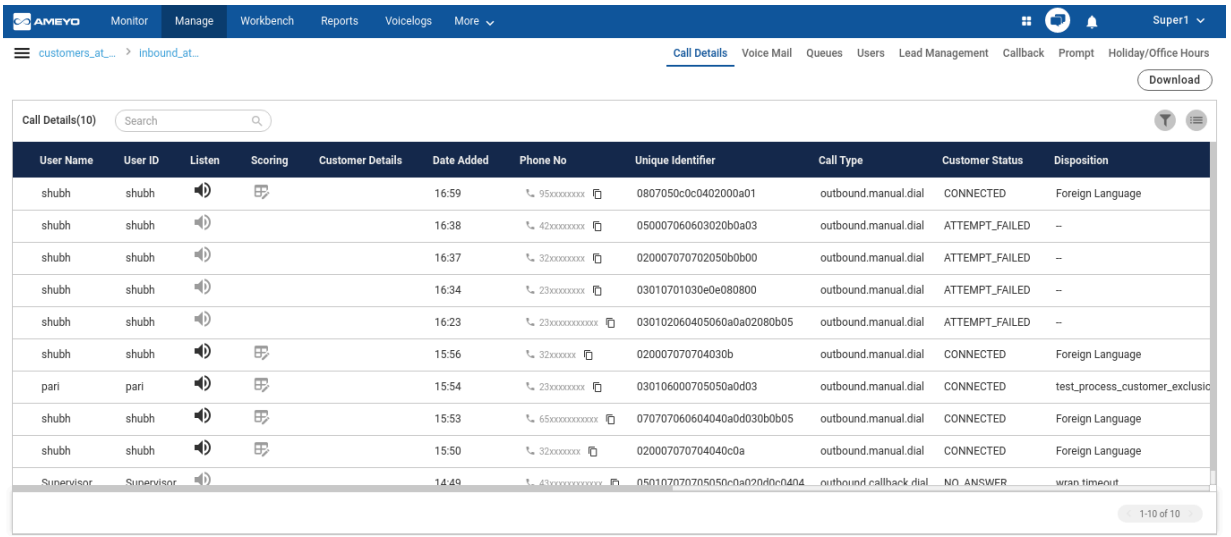


Figure: Manage Inbound Campaign

Filters

The Supervisor can click icon to filter the call details.

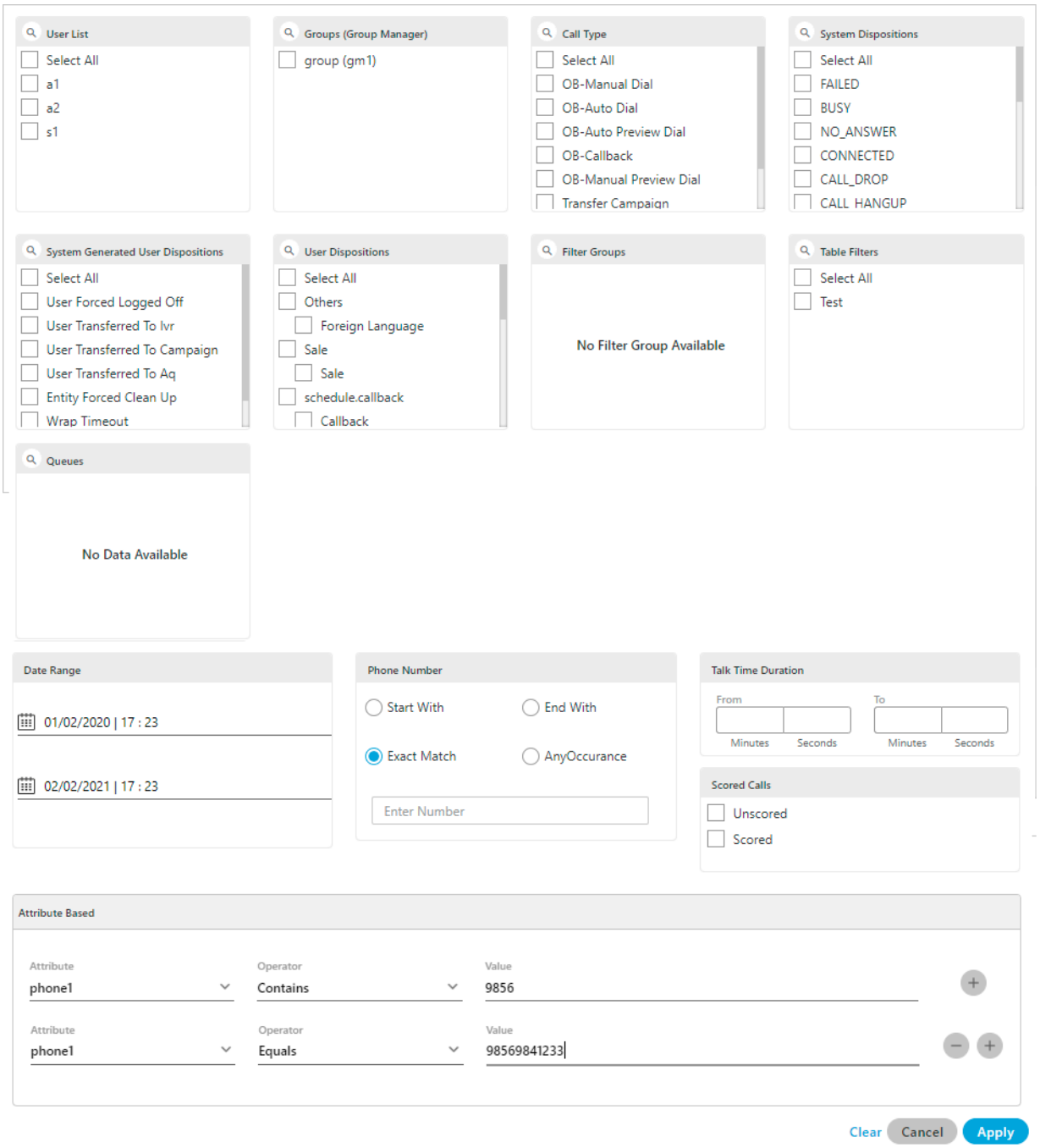


Figure: Filter Call Details

It contains the following filters.

1. **User List:** Supervisor can select the users for whom the supervisor wants to fetch the call details.
2. **Groups (Group Manager):** Supervisor can select the name of the group and group manager to search for the call details related with the agents of that group.
3. **Call Type:** Supervisor can also filter out the data in terms of the type of call, that is, whether it was OB Manual dial, OB Auto Dial, Transfer to phone, etc.
4. **System Disposition:** Supervisor can filter the call details according to the used system disposition to dispose the call.

5. **System Generated User Disposition:** Supervisor can filter the call details according to the system generated user disposition used to dispose the call.
6. **User Disposition:** Supervisor can filter the call details according to the user disposition used to dispose the call by the user.
7. **Filter Groups:** Supervisor can filter the data on the basis of the filter groups.
8. **Table Filter:** Supervisor can filter the data on the basis of the table filters .

> The Supervisor can click the search icon for any filter to convert the top header into a search box. Type the keyword and press "Enter" key to search for the required value in the list.

9. **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. Once you selected the date from the opened calendar, the default time corresponding to that date is also picked.
10. **Phone Number:** Supervisor can also filter the data in terms of following phone number patterns.
    1. **Start With:** Enter the initial digits of the phone numbers to filter out the records, for example, 1234, 3456, and others.
    2. **End With:** Enter the last digits of the phone number to filter out the records, for example, 4343, 6344, etc.
    3. **Exact Match:** Enter the phone number digits to filter out the records, for example, 1234, 3456, and others.
    4. **Any Occurrence:** Enter a few digits to filter out the records, for example, 34,87, and others.
11. **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.
12. **Scored Calls:** Supervisor can filter for those calls whose scores have already been provided. The supervisor can select either the Unscored or the scored calls.
13. **Queues:** The supervisor can filter the call details of the agents according to the queues. The supervisor can select the queues present in that campaign. If there is more than one

queue, then the supervisor can click "Select All" option to select all the queues at once. The search option has also been provided; that is, the supervisor can search for the queues.

14. **Attribute based:** Supervisor can select the attribute- based upon the defined filterable field in the table creation.Y
    - Select the campaign in which attribute- based filter, that is, the filterable fields are mapped.
    - Now, in attribute- based filter section, select the attribute type, which is the column name which is mapped as a filterable field in the campaign by the administrator.
    - Select the operator type through which you want to filter the calls. It contains the following three operators.
        1. **Contains:** It filter the calls which contains the provided input in their values.
        2. **Equals:** Selecting "Equals" as the operator will filter the calls which have the exact match to the applied content.
        3. **Not Equals:** Selecting "Not Equals" as the operator will filter the calls which do not have the match to the applied content.
        4. **Starts with:** It will filter those content, in which the entered attribute is starts with.
        5. **Ends with:** It will filter those content, in which the entered attribute is ends with.
    - Now, enter the value for which you want to filter the calls in the values column.

> You can provide multiple attributes to filter the content, by clicking "+" icon, or click "-" icon to delete the provided attribute- based filter.

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

Operations

The Supervisor can perform the following operations here.

Download

Click "Download" button to download the searched voicelog data in the CSV format. It downloads the complete content which is showing on the screen to the CSV format.

After clicking on the "Download" button, a pop-up comes up. Click "Save" button to download the voicelog. The name of the downloaded file is "CallDetails" by default, however you can change the name of the file.

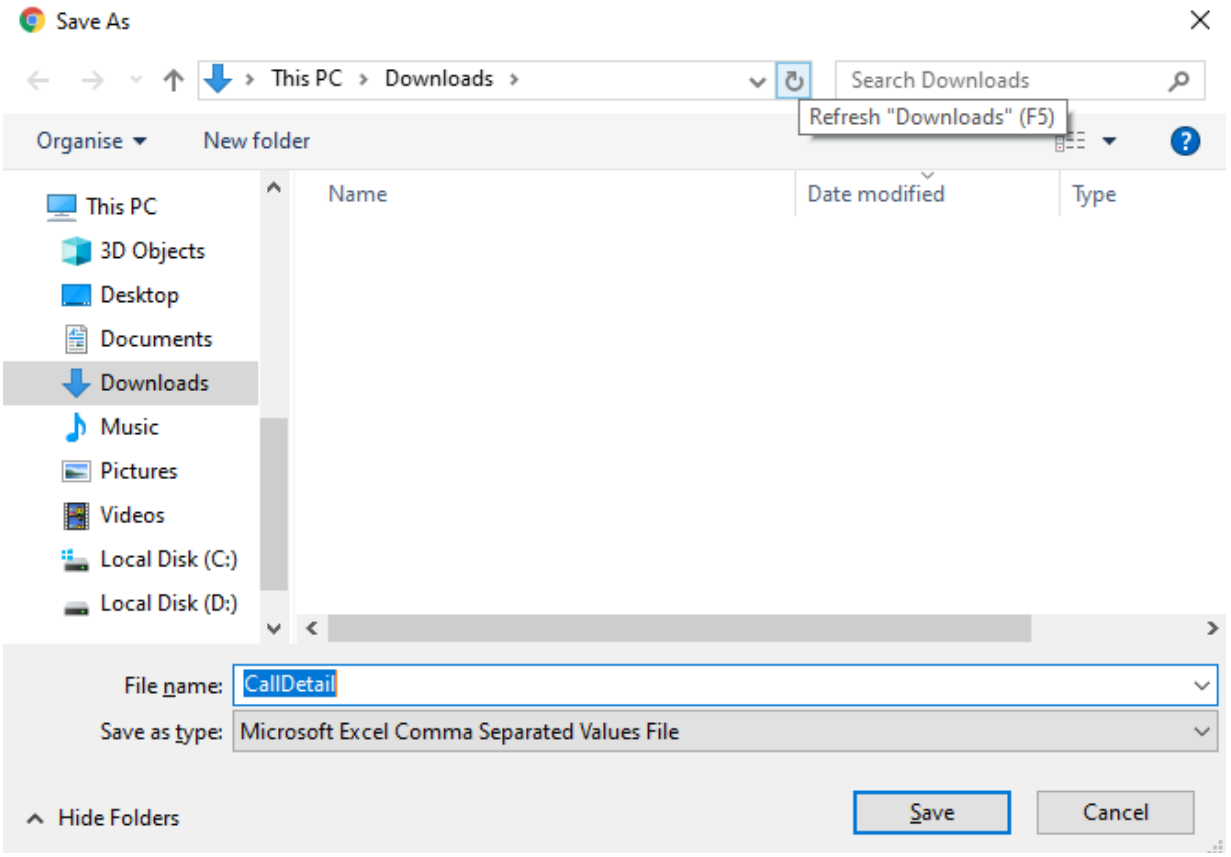


Figure: Downloading Pop-up

Before clicking on the save button, the supervisor can also change the name of the voicelogs.

> The downloading option depends upon the browser's setting. If the setting of the browser is set not to ask before downloading the file, then the pop-up will not come up.

Voice Log Search

The Supervisor can use the search bar to search for any voice log. The supervisor can search the voicelog with the user's name or with the phone number. Enter anyone in the search bar and press enter, the result starts showing on the screen.

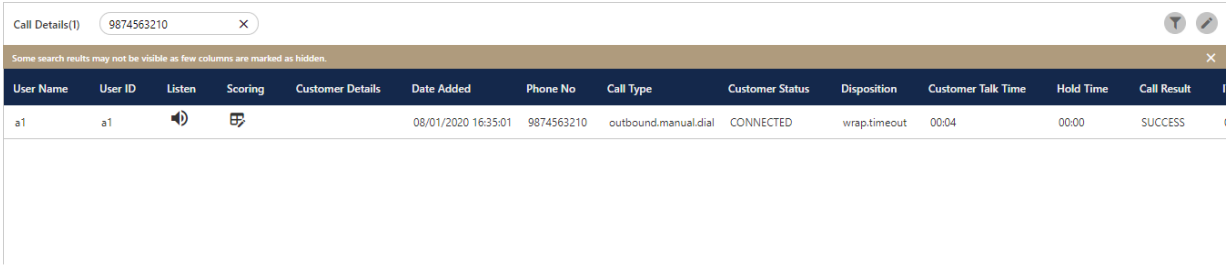


Figure: Search Voicelogs

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 at the bottom of the page, using which the user can download, increase/decrease volume along with other features like forward/reverse, mute/unmute, pause/un-pause the call. Hover your mouse cursor on  icon to use the speaker-related options like call volume and mute/unmute the calls. The row for which the voicelog is playing gets highlighted that helps the supervisor to recognize the playing voicelog and its corresponding call detail row.

> For not connected calls, "the listen button" remains disabled 

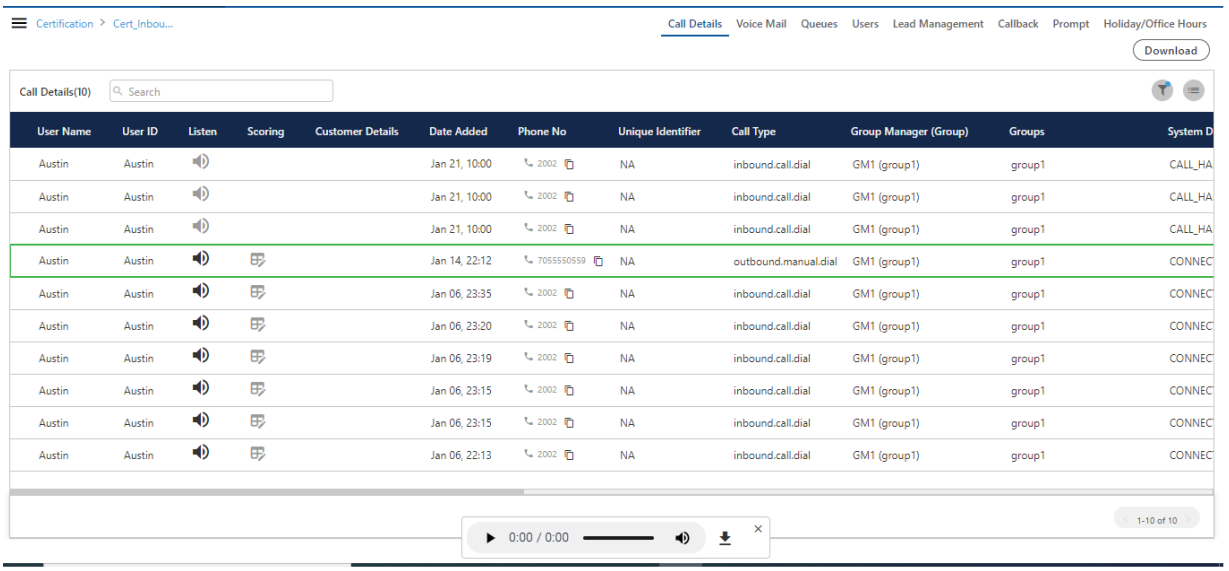


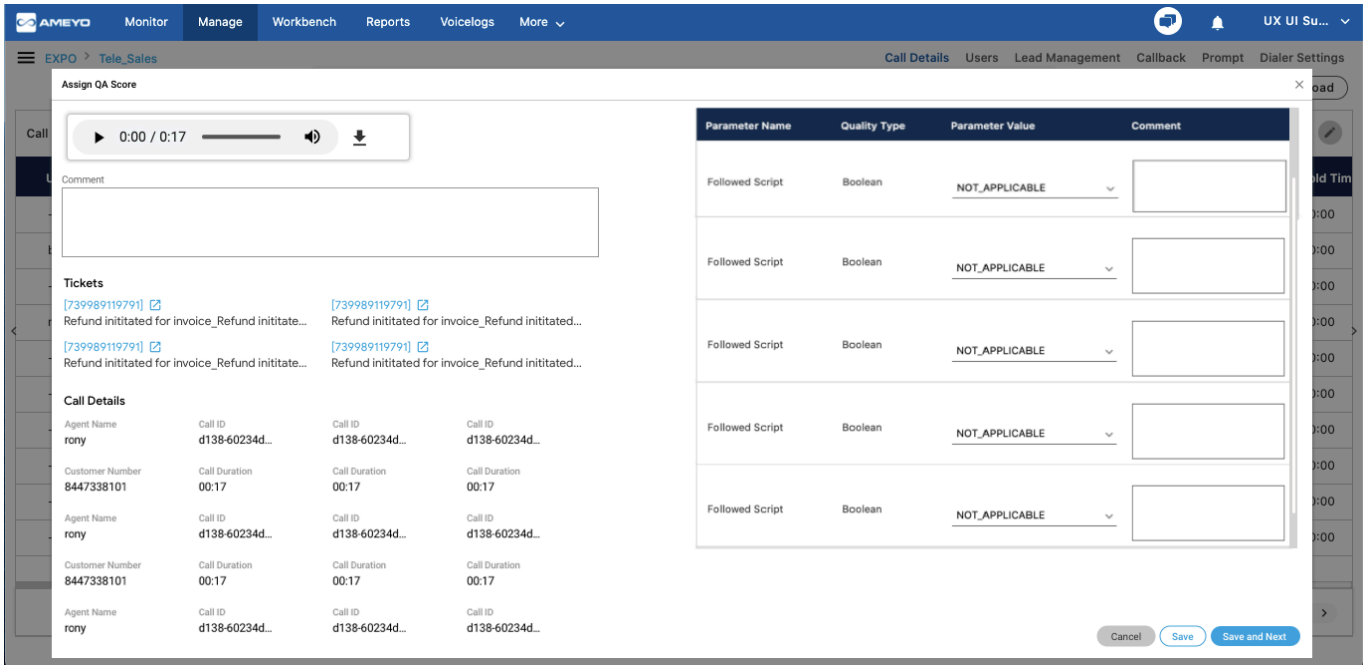
Figure: Play Voicelog

Clicking anywhere on the same page will not close the pop-up. Hence, the audio play will remain continuous. The Supervisor has to click icon to close the pop-up.

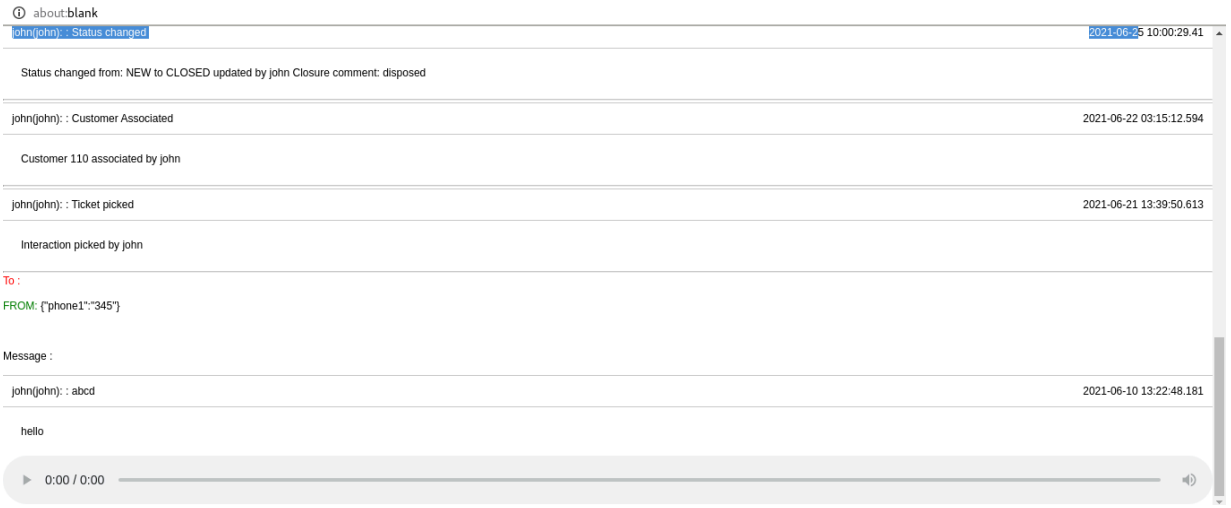
If you change the screen to any other menu or the campaign, then the voicelog play pop-up will be paused, and hence whenever the supervisor returns to the same page, the voicelog can be started to wherever it was paused, hence no need to restart it.

Scoring

Supervisor can provide scoring to the agent's call. Click icon present in the scoring column of the voicelog and the pop-up comes up. While scoring a call, an Analyst might want to go into details and see the ticket related to that call. Earlier, Ameyo did have a scoring option but their corresponding tickets were not shown over there.



On hovering over the ticket ID, the user can view the subject of the ticket. The user can click on the ticket ID to view the ticket in the read-only mode which is opened in a new tab.



On the opened pop-up, the supervisor can perform the following tasks.

1. **Agent's Name:** The Supervisor can see the agent's name who attended the call.
2. **Customer's Number:** It shows the customer's number through which the call has been done.
3. **Call Id:** It shows the call-id of the call. Ameyo generates the call-id for every call.
4. **Call Duration:** It shows the total duration of the call.
5. **Comment:** Supervisor can provide the comment to the call in the comments box.
6. **Listen:** Supervisor can listen to the call connected call. Click the call listing button to listen to the call log.
7. **Download Voicelog:** Supervisor can also download the voicelog and listen to them. Click 

icon to download the voicelog file.

After clicking on the "Download" button, a pop-up comes up. Click "Save" button to download the voicelog. The name of the downloaded file contains the extension name followed by the agent name and the date and time of the call.

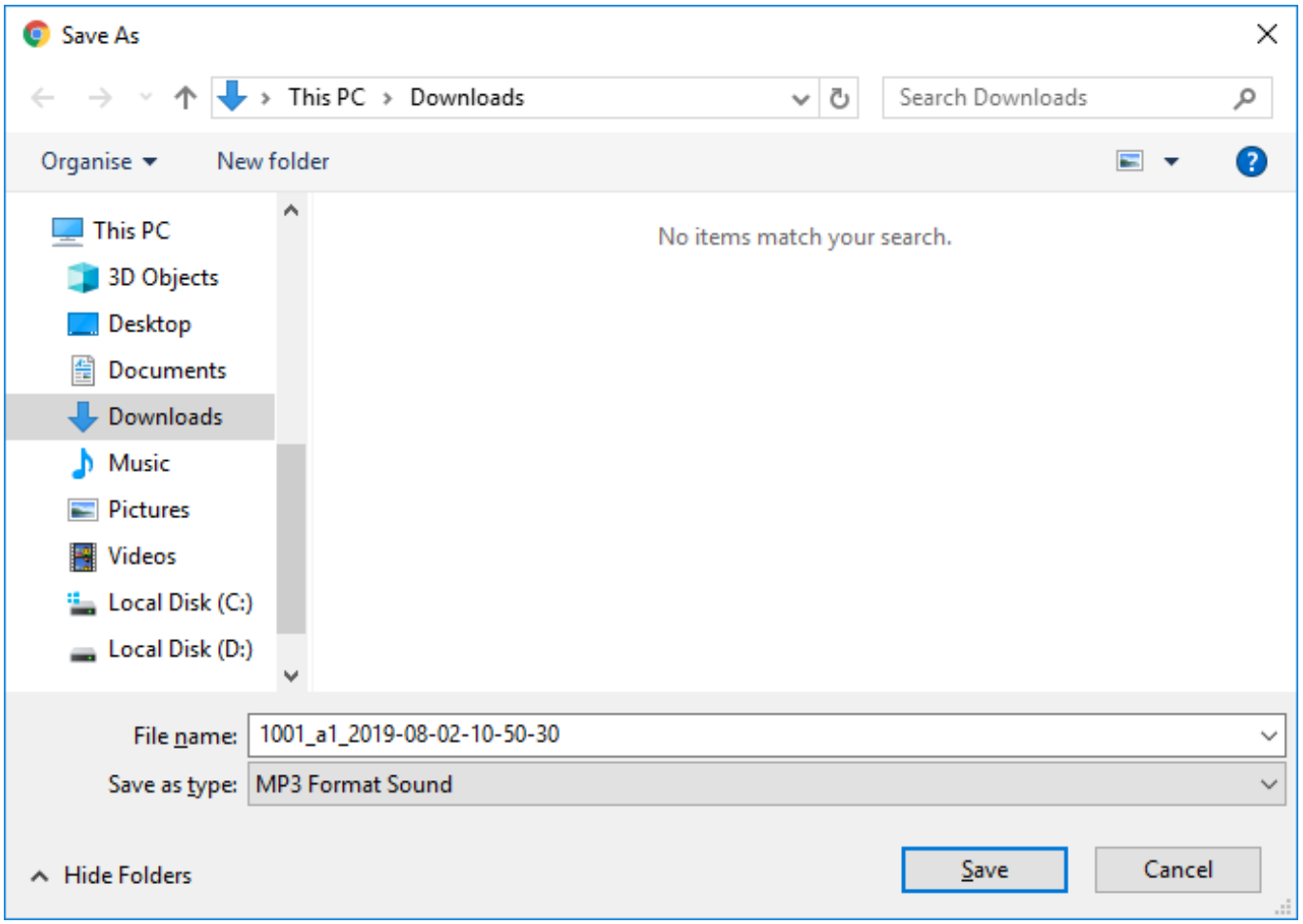


Figure: Downloading Pop-up

Before clicking on the save button the supervisor can also change the name of the voicelogs.

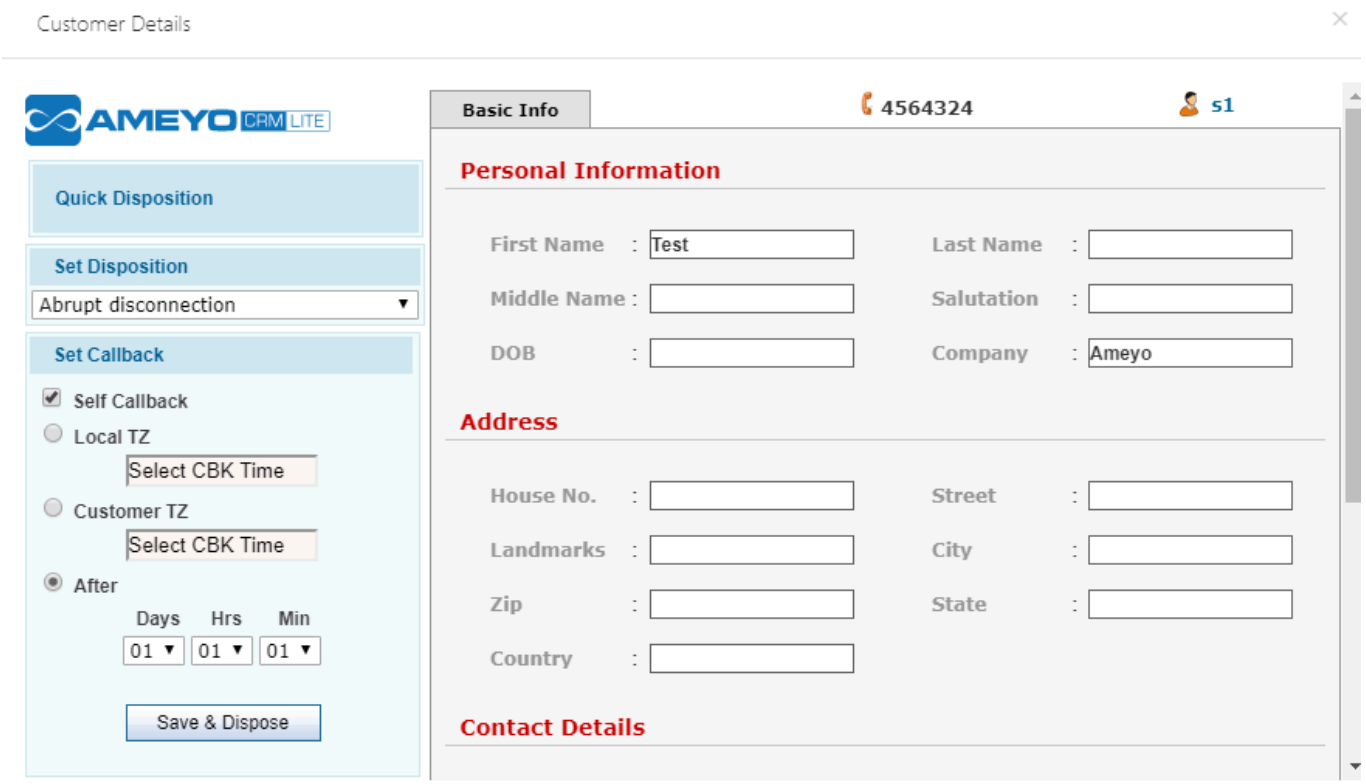
> The downloading option depends upon the browser's setting. If the setting of the browser is set not to ask before downloading a file, then the pop-up will not come up.

8. **Parameter Name:** It shows the list of the QA Parameters which are created to provide the ratings to the agent.
9. **Quality Type:** It represents the quality type of the QA Parameters, (here we have the QA parameters in Range types).
10. **Parameter Value:** It shows the QA value which is provided by the administrator to rate the call for QA Parameters.
11. **Comment:** It is the comment box to provide the comment on the the parameters of the rating. It can be provided individually for each parameter name.

12. After completing the above steps, click "Save" to save the data or "Save and Next" to save the data and view the next call log from the same screen.
13. View tickets associated with the call.

View CRM

Click View CRM icon to see the customer's detail in the CRM, which was filled by the agent at the time of the call. It shows the following pop-up.



On this screen, the supervisor can see the complete details of the customer. If the agent does not fill the details, then the supervisor can edit any customer's information from this screen as well. After editing, click "Save" button to save the provided information.

View Customer Card

Supervisor can view the customer card, which contains the basic information configured by the administrator to be displayed to the agent, by hovering the mouse over the customer's name.

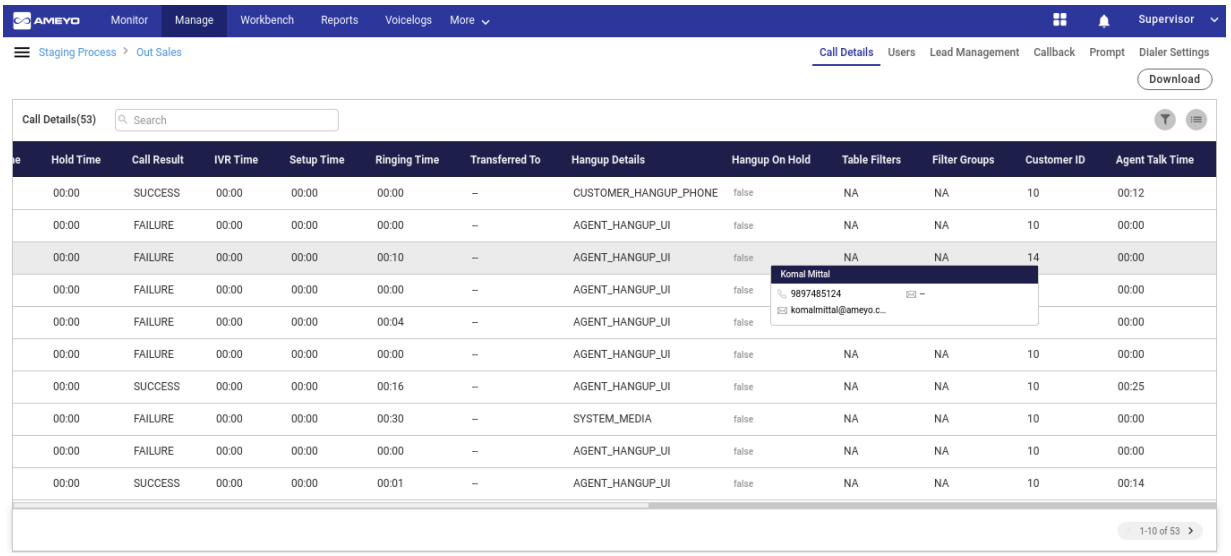


Figure: Customer Card

Call Notes

The notes which are given by the agent at the time of the call are known as call notes. The supervisor can view these notes along with the details of that call. Click  icon to view the call notes of that call.

If the call note is not provided, then the expendable icon will also be not shown in the call details bar.

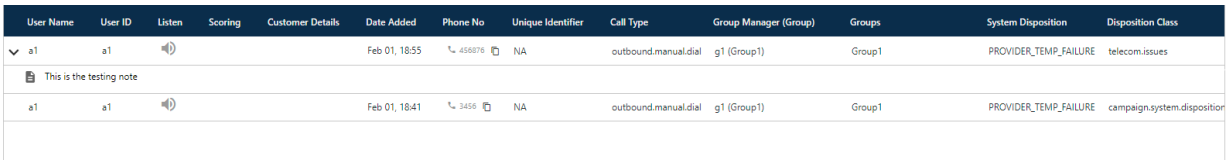


Figure: Call Notes

If the filters are not applied, then the call notes dumped very last by a user on a call will be displayed. The Supervisor has to apply the filters to view the call notes differently for individual users.

Customize the View

The Supervisor can click  icon to use the settings of the Call Details.

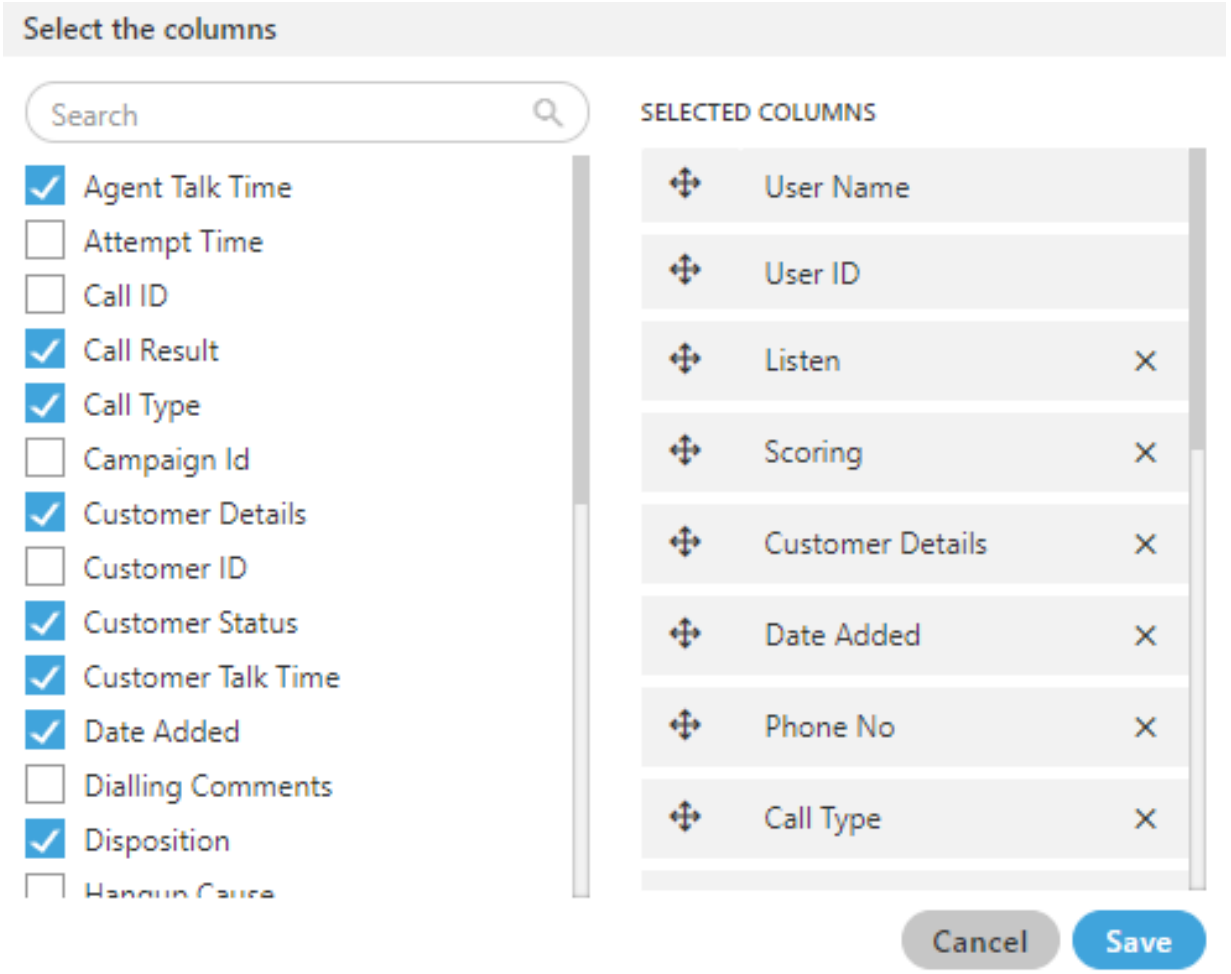


Figure: Settings Call Details

Supervisor can manage the display bar menu present at the top of the page. Settings icon helps the supervisor to sort the menu listings bar.

Check the boxes to see only those filters which are useful for the supervisor and helps him to monitor the agents.

In the right part of the section, the user can click and hold icon and drag a column upward or downward to change the sequence of the columns in the table. The column on top will be displayed at the first position from the left.
If some columns are mandatory to be displayed, then the user will not have the option not to select or deselect the colums.

User Card

The supervisor can see the basic information of agents assigned in that campaign by hovering its mouse over the agents name.The user card is displayed while hovering the

mouse on the user name of the user. Following screen is displayed while hovering the mouse over the username of the user.

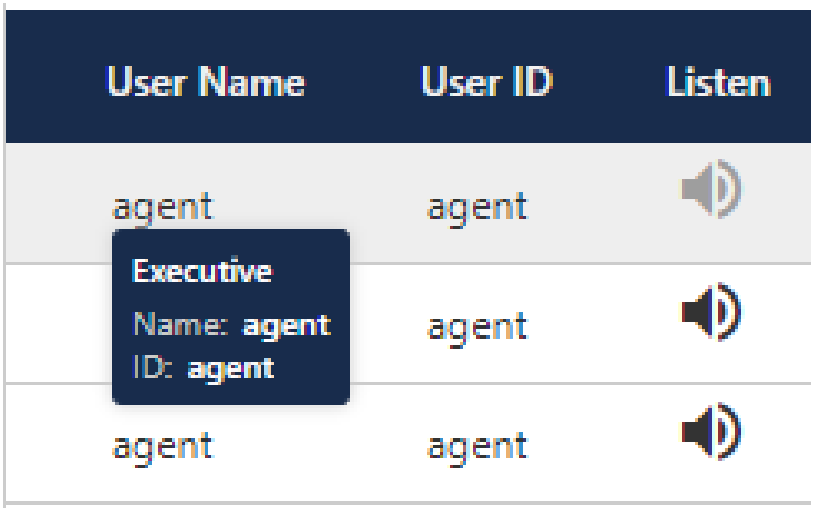


Figure: User Card

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

Columns

Following are the columns which are used to define the call details.

1. **User Role:** It shows the type of user who is logged-in to the Ameyo.
2. **User Name:** It shows the name of the user.
3. **User ID:** It shows the id of the user.
4. **Listen:** It is a clickable entity that allows you to listen to the voicelogs(explained above).
5. **Scoring:** It is a clickable entity that allows you to provide the rating to the agent's call(explained above).
6. **Customer Details:** It is a clickable entity which shows the complete information of the customer in the CRM.(explained above)
7. **Customer ID:** It shows the customer id. Customer id is unique for all customers and it generates only for those customers whose details are registered in CRM.
8. **Date Added:** It shows the date and time of the customer's details when details has been saved in the CRM.
9. **Phone No:** It shows the phone number of the agent through which the call has been handled.
10. **Unique Identifier:** It contains the unique identifiers for the masked phone numbers.

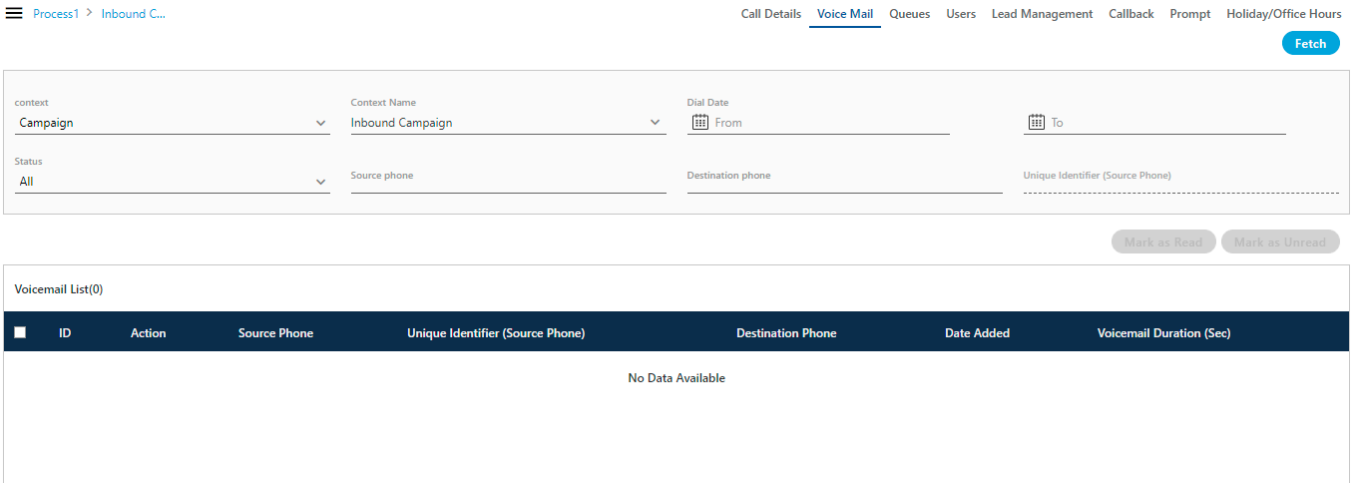
11. **Call Type:** It shows the type of call.
12. **Group Manager:** It shows the name of the group manager under whom the agent is assigned in.
13. **Groups:** It shows the name of the group in which the agent is assigned in.
14. **Call ID:** It contains the call-id. Call-id id different for every call and is generated by Ameyo automatically.
15. **Customer Status:** It shows the status of the customer. Here, "CONNECTED" means that the customer picks the call and "BUSY" means that the customer did not pick up the call.
16. **Dialing Comments:** It shows the comments which have been inserted by the agent while calling to the customer.
17. **Transferred to:** It shows whether the call has been transferred to another campaign/queue or not.
18. **Hangup Details:** It shows the reason for the call for which the call has been disconnected.
19. **Hangup Cause:** It shows the cause code for the Hangup Details for which the call has been disconnected. It includes "SYSTEM_HANGUP", "AGENT_HANGUP_UI", "CUSTOMER_HANGUP_UI", "AGENT_CANCELLED_PREVIEW", "UNKNOWN", "SYSTEM_MEDIA", "AGENT_HANGUP_PHONE", "CUSTOMER_HANGUP_PHONE". Click here to know about the definition of these hangup causes.
20. **Hangup Cause Code:** It shows the cause code for the Hangup Details and Hangup Cause for which the call has been disconnected. This Hangup code is based upon the codes which have been registered in Ameyo according to Hangup Cause.
21. **Hangup On Hold:** It shows whether the call has been disconnected while the agent put the call on hold or not.
22. **System Disposition:** It allows the supervisor to view the system disposition of the call.
23. **Disposition Class:** It allows the supervisor to identify the exact reason for the call disposition.
24. **Disposition Code:** It allows the supervisor to view the disposition code through which the call was disposed off.
25. **Customer Talk Time:** It shows the total duration of the call in between the agent and customer.

26. **Hold Time:** If the agent put the call on hold, then it shows the total duration of the hold time for which the call has been put on hold.
27. **Campaign ID:** It shows the campaign ID from which the call has been dialed by the agent.
28. **Queue Name:** It shows the queue name from which the call has been dialed by the agent.
29. **Lead ID:** If the call is dialed from the lead, then this column shows the id of the lead from which the call has been dialed to the customer.
30. **Attempt Time:** It shows the date and time of the call when the call has been attempted to dial.
31. **Call Result:** It shows whether the call is successfully dialed and received by the customer or there was some error while dialing the call.
32. **IVR Time:** It shows the total duration of the call when the call was in the IVR.
33. **Setup Time:** It is the total time that is taken to connect both numbers, that is, the time taken to connect the customer and agent through a network channel.
34. **Ringing Time :** It shows the total duration of the ring before the call is picked by the user.
35. **Table Filters:** It shows the table filter which had been used while making the call.
36. **Filter Groups :** It shows the filter group which has been used in making the call.
37. **Agent Talk Time :** It shows the total duration of the calls handled by the agent, which consists of the total duration spent by the agent on call for all the customers.

19.2.5.1.2. Voicemail (Licensable)

In the 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 to these Voicemails as per user, queue, or campaign.

> This feature is licensable, hence ask your administrator for further information on the same.
> Voicemails should be configured by the Administrator first at System-level and then at queue-level.



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.
    1. **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.

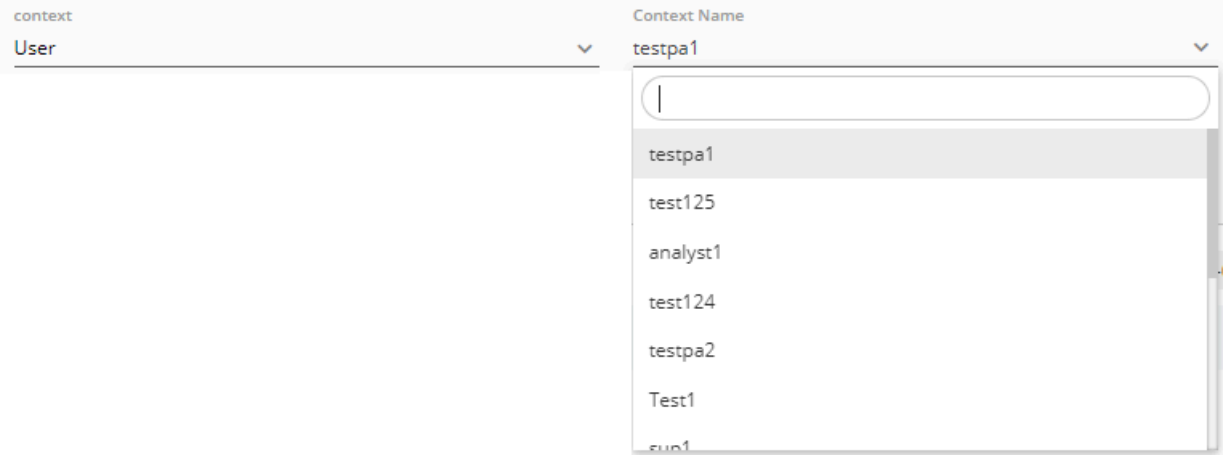


Figure: Select User

2. **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.

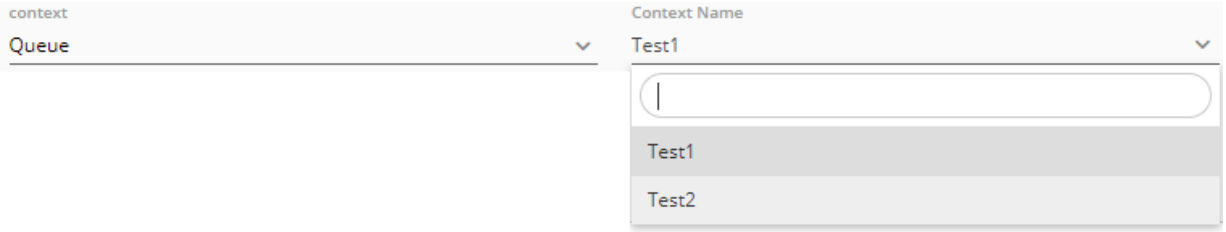


Figure: Select Queue

3. **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.

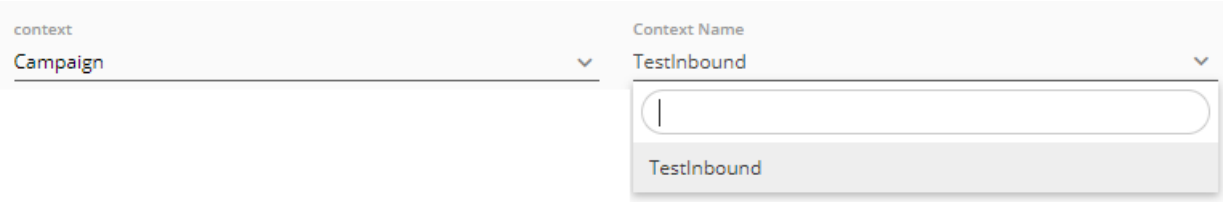


Figure: Selected Campaign

2. In "Status" drop-down menu, select any of the following options.
    1. **All:** Select it to fetch all voicemails whether they have been read or unread.
    2. **Read:** Select it to fetch only read voicemails.
    3. **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.

1. Click "From" text field and select a date from the calendar.

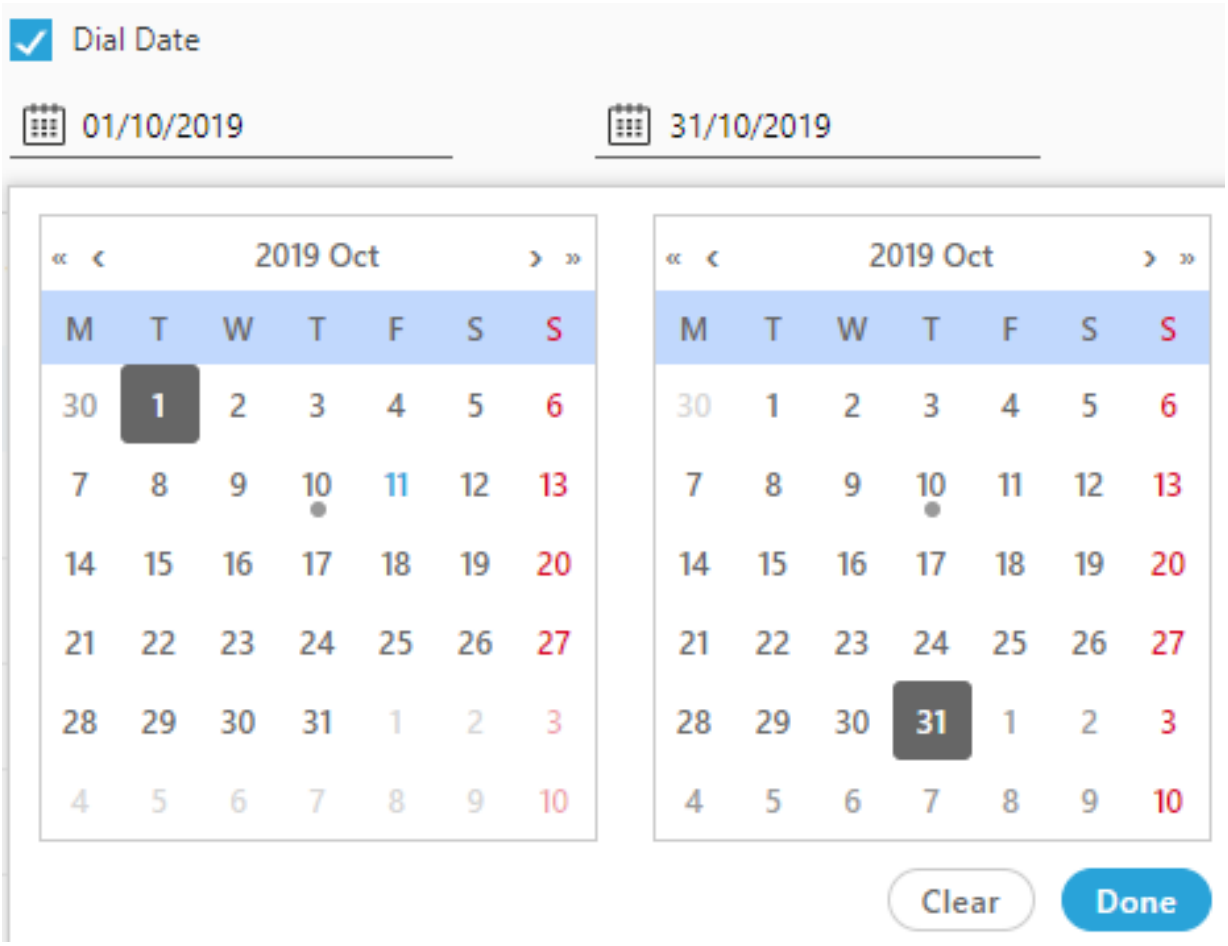


Figure: Select "From" and "To" Dates

2. Click "To" text field and select a date from the calendar.

4. **Source Phone (Optional):** Enter the source phone number to fetch the voicemails generated from the provided source phone number only.
5. **Destination Phone (Optional):** Enter the destination phone number to fetch the voicemails at the provided destination phone number only.
6. Click "Fetch" button to fetch the voicemails.

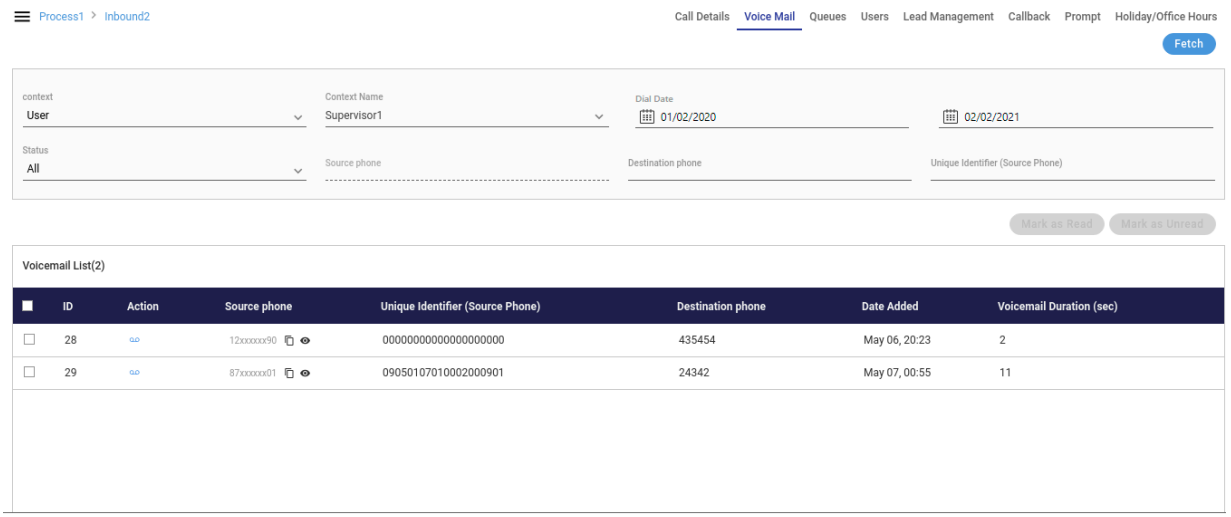


Figure: Fetched List of Voicemails

Fetched list of voicemails contains the following column information.

1. **ID:** It shows the ID of the fetched voicemails. Each voicemail has a unique ID generated by Ameyo itself.
2. **Action:** From the Actions column of the voicemail, the supervisor can listen to the voicemails. Click icon to listen the voicelog. A pop-up is arised.

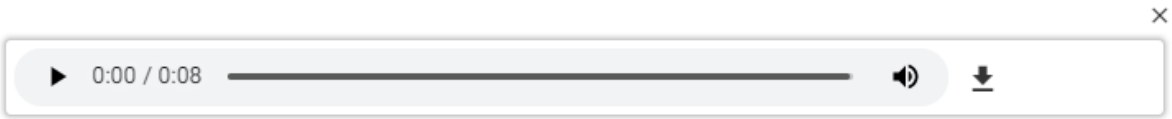


Figure: Listen the Voicemail

The supervisor can download the voicemails as well. Click the download button and the downloading pop-up comes up.

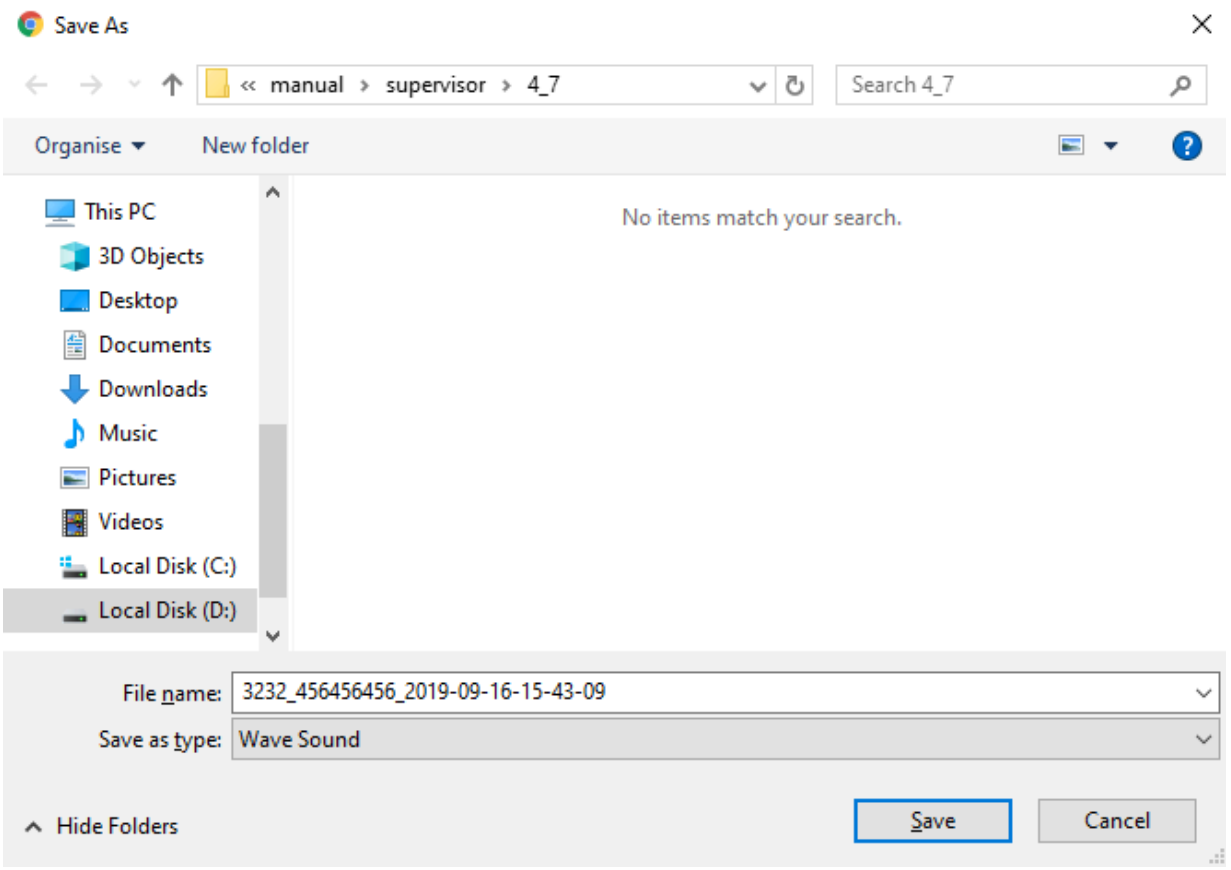


Figure: Download the Voicemail

Click "Save" button to save the voicemail, else click "Cancel" button to cancel the downloading of the voicemail.

3. **Unique Identifier:** It shows the unique identifier of the call, if the number masking is enabled. If number masking is not enabled, then it will be shown as blank.
4. **Source Phone:** It shows the source phone number through which the call has been dialed.
5. **Destination Phone:** It shows the destination phone number on which the call has been received at the customer side.
6. **Date Added:** It shows the date and time on which the voicemail has been created.
7. **Voicemail Duration:** It shows the total duration (in seconds) of the voicemail.

The supervisor can perform the following operations on the fetched list of the voicemails.

1. **Mark as Read:** Select the voicemail and click "Mark as Read" button to mark the selected voicemail as read.
2. **Mark as Unread:** Select the voicemail and click "Mark as Unread" button to mark the selected voicemail as unread.

3. **Delete:** Select the voicemail which you want to delete. A confirmation pop-up arised. Click "Yes" button to delete the voicemail permanently, else click "No".

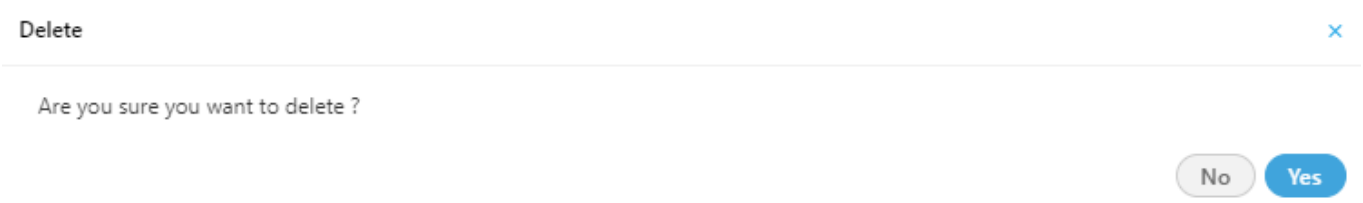


Figure: Deleting the Voicemail

Note: The deleted voicemail can not be retrieved from in any manner.

19.2.5.1.3. Queue Management

This guide helps you to determine the answers for following:

How to Create a New Queue?

What are the Queue Configuration Parameters

Creating a New Queue

To configure a new queue for a campaign, follow these steps:

1. Navigate to the Campaign Management section and click on "Queues" tab.

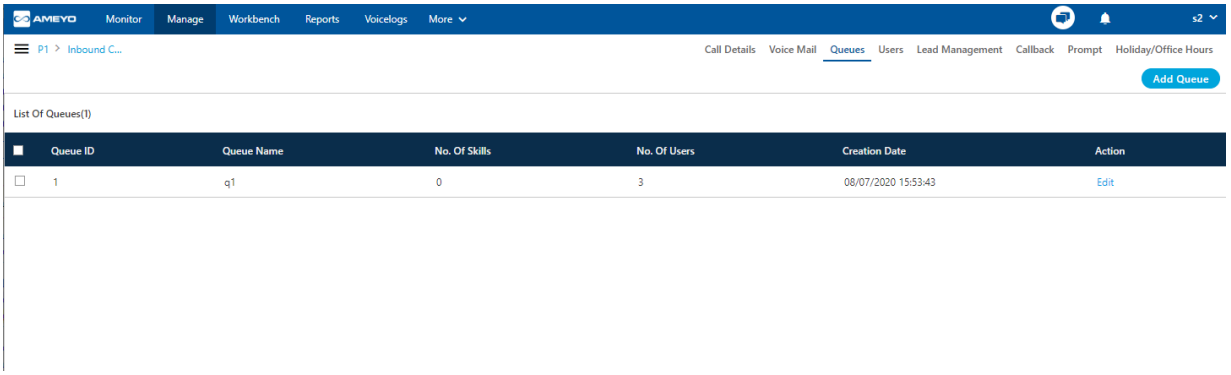


Figure: Manage Queue

2. Click the **Create Queue** button.
3. Enter a descriptive **Name** for the queue.

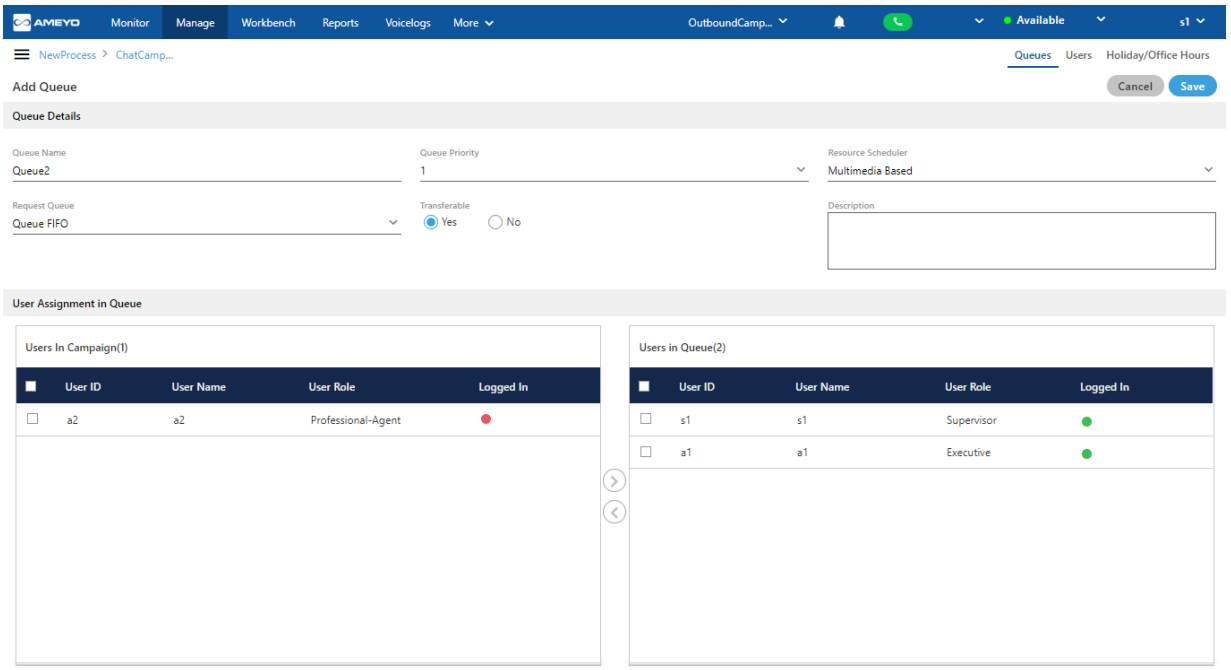


Figure: Create Queue

4. Configure the **Queue Parameters** (detailed below).
5. Click **Apply** to save the new queue.

Queue Configuration Parameters

When creating or editing a queue, you must configure the routing logic and prioritization settings:

1. Queue Priority

This setting determines the priority of the *queue itself* relative to other queues an agent is assigned to.

- **How it works:** If an agent is assigned to multiple queues (e.g., Queue A and Queue B) and becomes available while calls are waiting in both, the call from the **Higher Priority** queue will be routed to the agent first.

2. Request Queue Type (Customer Priority)

This defines the logic for sorting *customers* waiting within the same queue.

- **Queue FIFO (First In, First Out):** The default standard. The customer who has been waiting in the queue the longest is connected to the next available agent.
- **Queue Priority (Nodeflow):** Uses Nodeflow logic to assign priority levels to individual callers.

- *Example:* If Customer 1 (Priority 1) arrives first, and Customer 2 (Priority 2/Higher) arrives later, Customer 2 will be connected first due to higher priority status.

3. Resource Scheduler

This determines which specific agent within the queue receives the call.

- **LRU (Least Recently Used):** Routes the call to the agent who has been idle (available) for the longest duration.
- **Multiple Extension:** Select this if agents in this queue handle both voice calls and chat interactions simultaneously (Agents must be logged into a chat campaign; requires appropriate licenses).
- **Multimedia:** Select this if agents in this queue handle *only* chat interactions (Agents must be logged into a chat campaign; requires appropriate licenses).
- **Skill Based:** Routes calls based on defined agent skills and proficiency levels. *Note: This option is only visible if the "Skill Based Routing" license is enabled.*

4.Transferable Status

- **Enabled:** Agents will see this queue name in their transfer dropdown menu, allowing them to transfer active calls to this queue.
- **Disabled:** This queue will not appear as a transfer destination for agents.

Users assignment

Once the queue is created, you must staff it with users.

1. In the **Assign Users** section, locate the **Available Users** list.
2. Select the desired agents and click the **Arrow Icon** to move them to the **Assigned Users** list.
3. To remove an agent, select them in the "Assigned Users" list and click the reverse arrow icon.

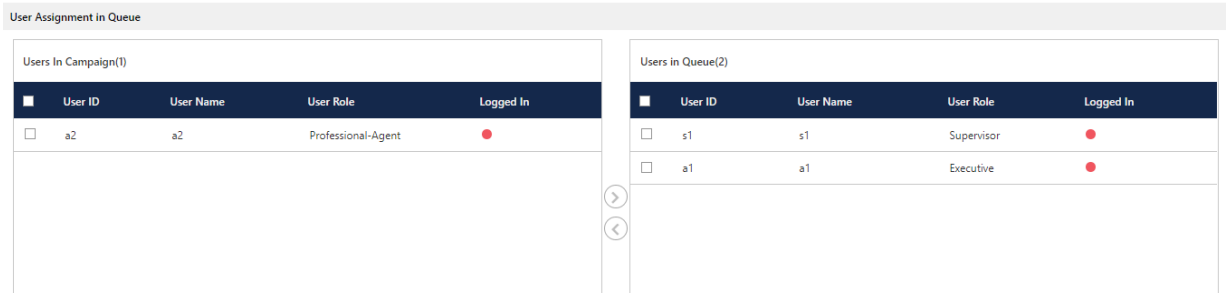


Figure: Assign or Unassign Users in the Queue

Editing a Queue

To modify an existing queue:

1. Select the queue from the list (available in the "**Queues**" tab)
2. Click the **Edit** button.
3. Modify the necessary parameters (Name, Priority, Scheduler, User Assignment, etc.).
4. Click **Apply** to save changes or **Cancel** to discard them.

> **Note:** Changing queue settings updates the system level configuration immediately. This impacts all users currently assigned to that queue. It is advised to perform edits only when mandatory to avoid disrupting active operations.

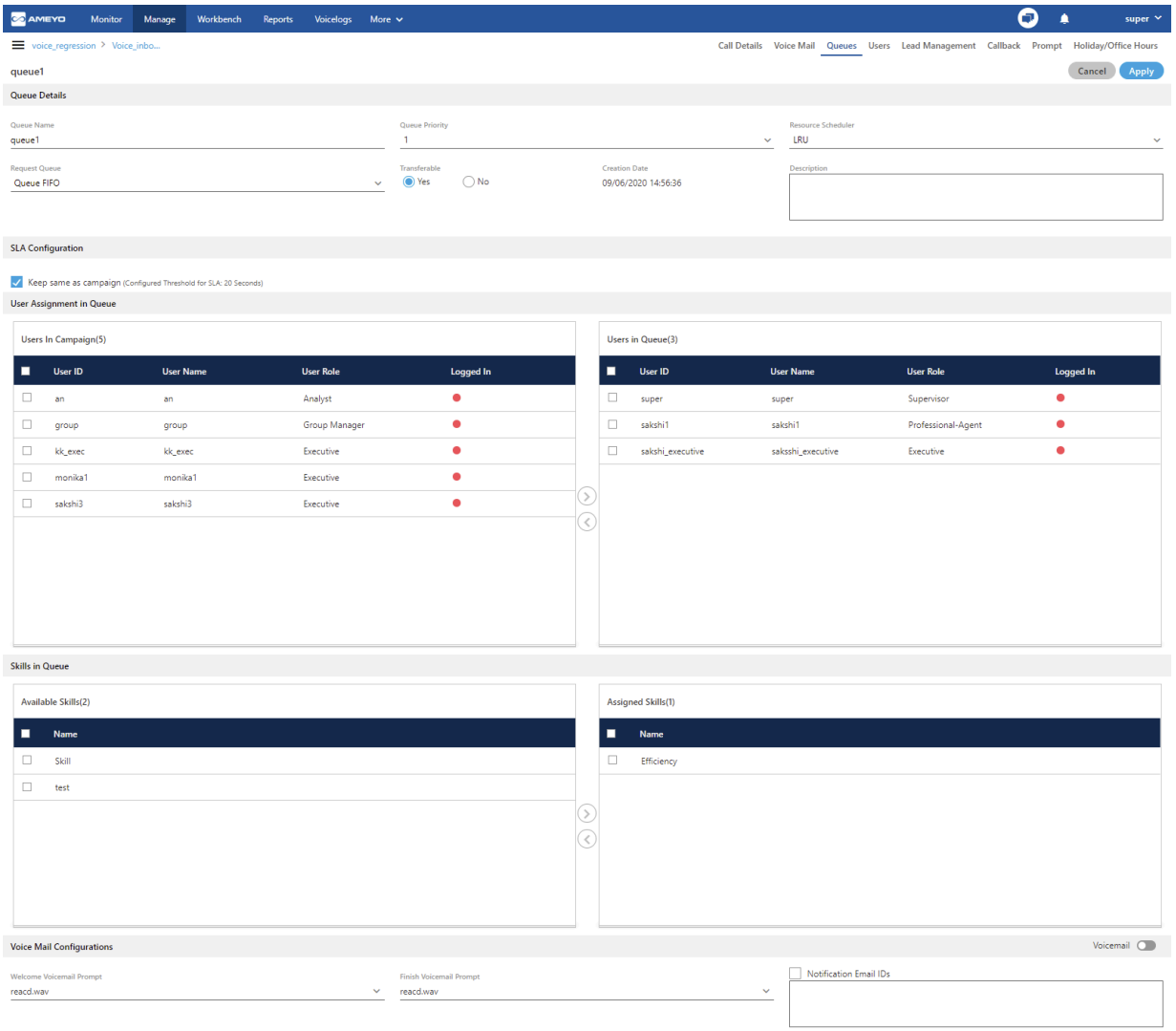
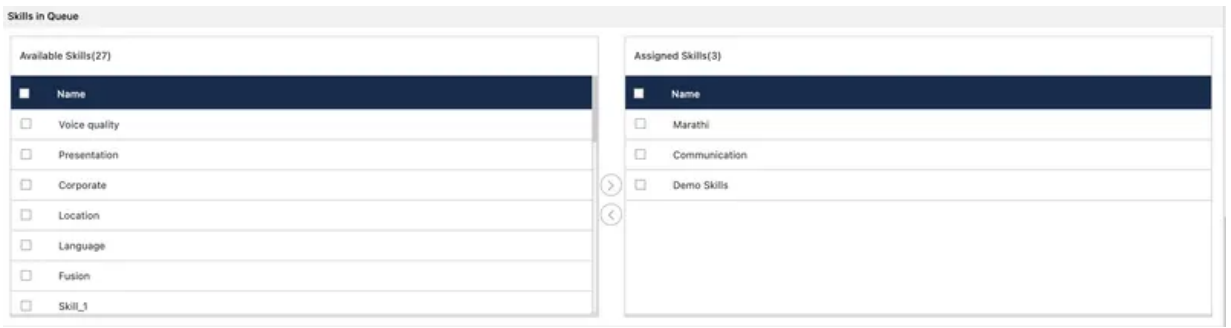


Figure: Modify Queue

Skill Assignment

If utilizing Skill Based Routing, supervisors can assign specific skills to the queue (provided skills have been created by the administrator). Agents assigned to the queue will receive calls based on the alignment of the call's required skills and the agent's assigned skills.

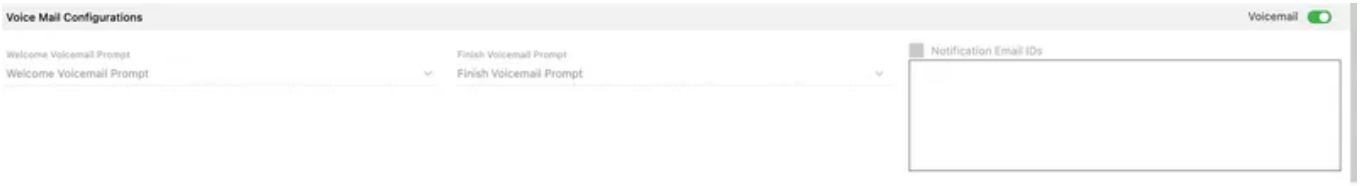


Voicemail Configuration

> *Note: Voicemail is a licensable feature.*

If enabled, callers can leave a message when no agents are available.

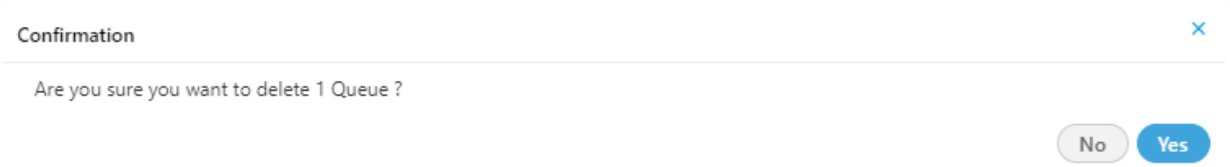
- **Voicemail Toggle:** Switch the slide button to **ON** to enable features.
- **Notification Email IDs:** Check this box to trigger email alerts when a voicemail is received.
    - *Configuration:* Enter the recipient email addresses in the text box. Multiple emails can be added by separating them with a comma (,) or colon (:).
- **Welcome Voicemail Prompt:** Select the audio file played to the customer inviting them to leave a message.
- **Finish Voicemail Prompt:** Select the audio file played to the customer after the recording confirms the message was saved.



Deleting a Queue

To remove a queue permanently:

1. Select the queue from the list (available in the "**Queues**" tab).
2. Click the **Delete** button.
3. A confirmation pop-up will appear. Click **Yes** to confirm or **No** to revert.



> **Warning:** Once a queue is deleted, it **cannot be retrieved**. Ensure the queue is no longer needed before confirming deletion.

Configuration Summary

Feature	Description
Request Queue Type	Logic for sorting waiting customers (FIFO or Priority based).
Resource Scheduler	Logic for selecting the agent (Idle time, Skills, or Media type).
Queue Priority	Priority level of this queue relative to other queues the agent serves.
Transferable	Visibility of this queue in the agent's "Transfer Call" dropdown.
Voicemail	Toggle to enable message recording with email alerts.

Important Notes

- **Deletion is Permanent:** Once a queue is deleted, it cannot be retrieved.
- **Live Impact:** Editing a queue while active immediately impacts routing for all assigned agents. It is recommended to make changes during low-traffic periods.

19.2.5.1.4. Callback Management in a Campaign

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

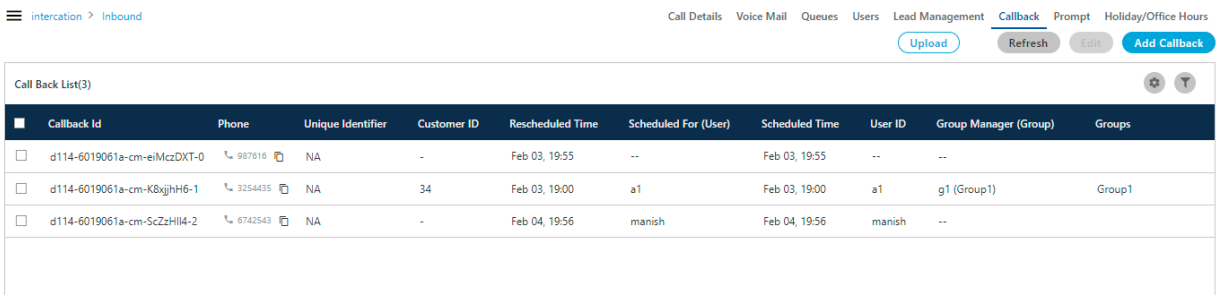


Figure: Callback Management in a Campaign

Supervisor can perform the following operations.

Add a Callback

Supervisor can add any callback by following the below steps.

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

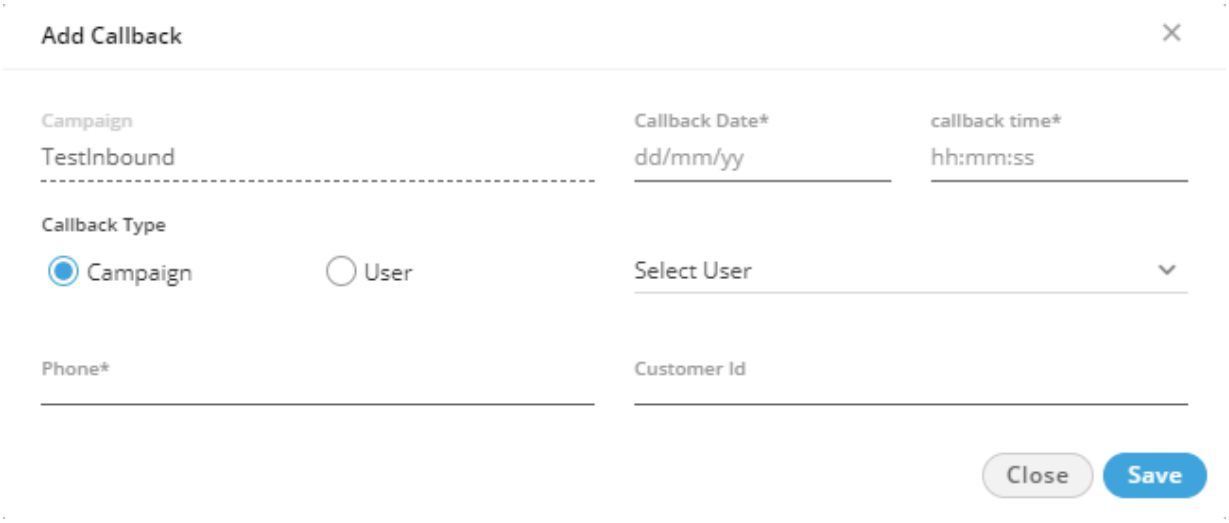


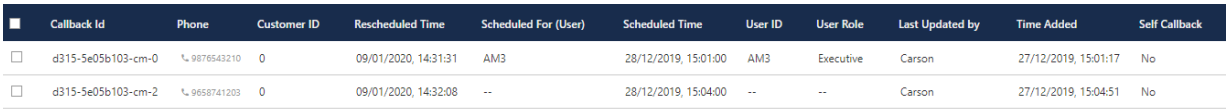
Figure: Adding a Callback

2. Select the callback date & time (mandatory fields) from the calendar option.
3. Select any of the following callback types.
    1. **Campaign:** Select it if the callback has to be scheduled for the respective campaign in which Supervisor is logged in.

2. **User:** Select it if the 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	Phone	Customer ID	Rescheduled Time	Scheduled For (User)	Scheduled Time	User ID	User Role	Last Updated by	Time Added	Self Callback
d315-5e05b103-cm-0	9876543210	0	09/01/2020, 14:31:31	AM3	28/12/2019, 15:01:00	AM3	Executive	Carson	27/12/2019, 15:01:17	No
d315-5e05b103-cm-2	9658741203	0	09/01/2020, 14:32:08	--	28/12/2019, 15:04:00	--	--	Carson	27/12/2019, 15:04:51	No

Figure: Added Callbacks

Edit Callbacks

Select the Call from the list of the available callbacks which you want to reschedule. After selecting the call, the "Edit" button starts displaying at the left top of the page. Click "Edit" button. A pop-up containing complete detail of the call comes up.

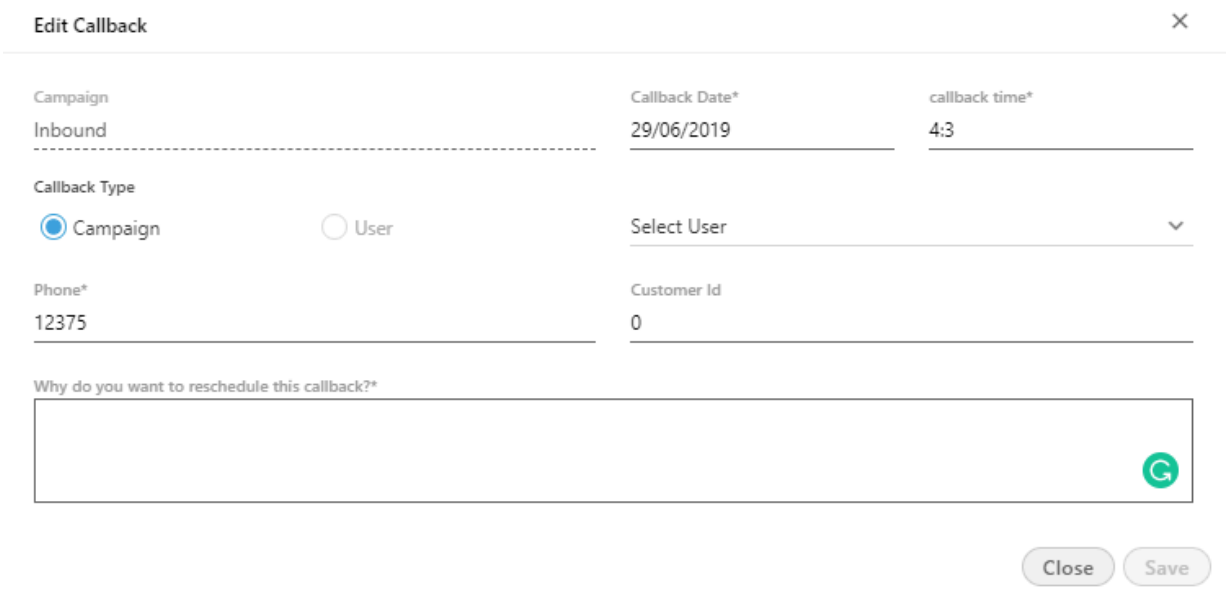


Figure: Edit Callbacks

On the pop-up, you can change the Callback date, callback time, phone number, and the agent name as well. After changing all the information, you have to enter the reason for which you are rescheduling the callback. The reason is mandatory which means you have to fill it.

Click "Save" button to save the changes made.

Limitations for Editing callbacks

Following are some limitations of editing callbacks for the supervisor.

1. Supervisor cannot change the campaign callbacks to user-specific callbacks, but user-specific callbacks can be changed to campaign callbacks.
2. Supervisor cannot edit multiple callbacks at once. However, multiple callbacks can be deleted at once.

Search Callbacks

The supervisor can search for the callbacks with the help of customer's Id, Customer's phone number and customer's name. It helps the supervisor to search the callback with comparatively higher speed

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.

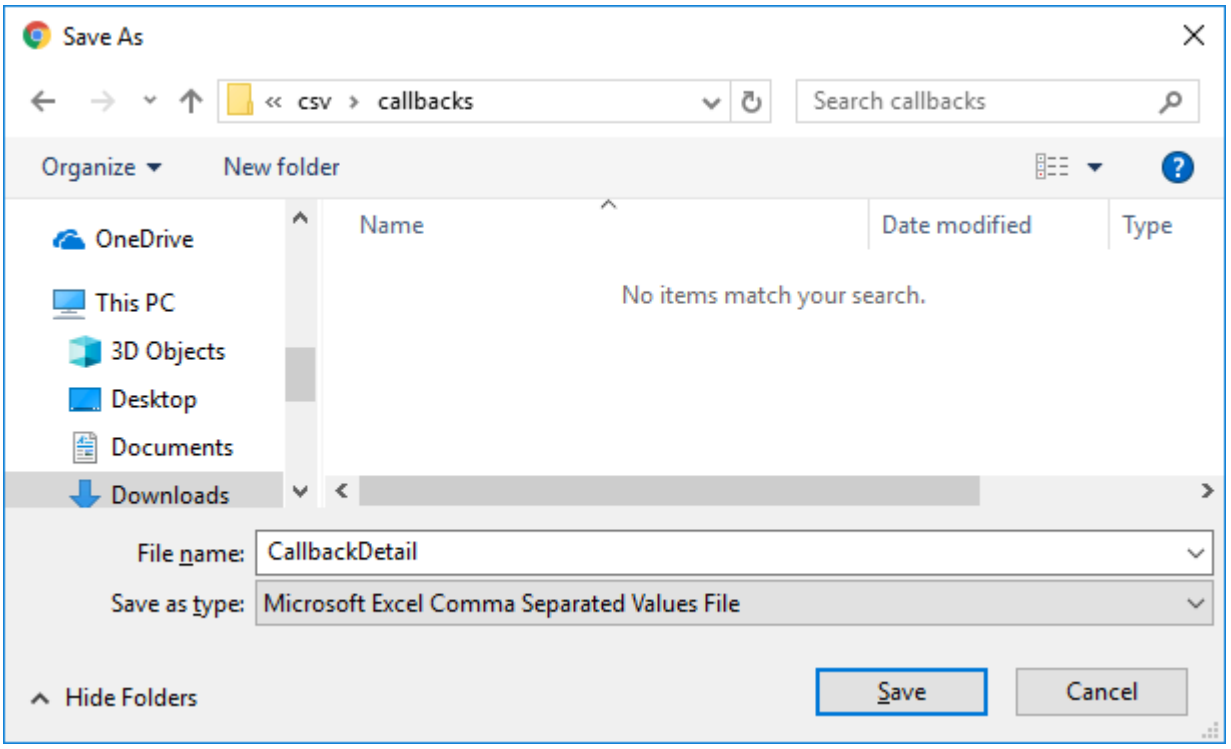


Figure: Extract Callbacks

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

Settings

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

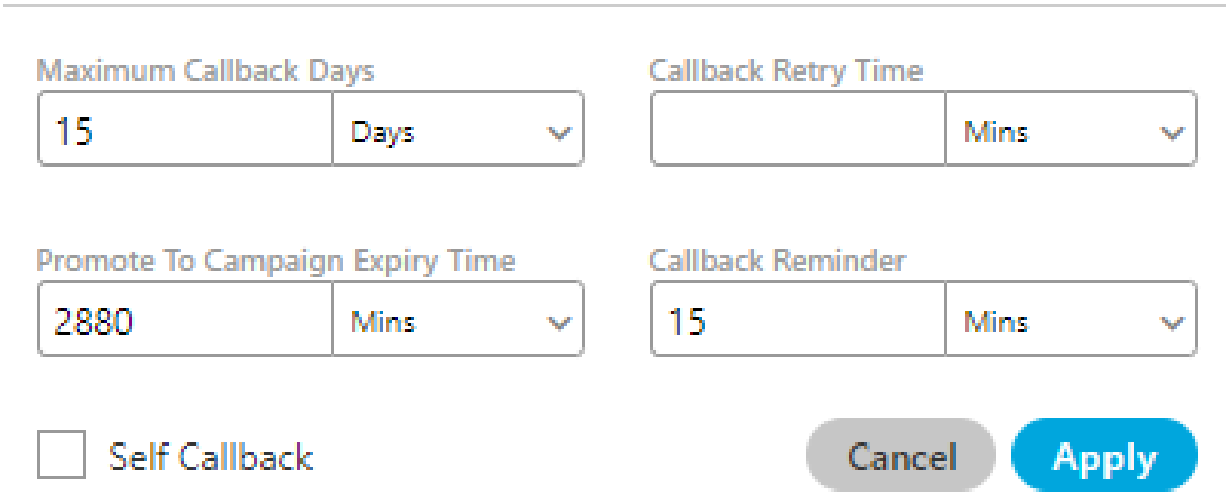


Figure: Configure Callback

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 the previous attempt.
5. **Callback Reminder (min):** It is the time before which the callback notification will be displayed in the notification bar of the respective agent or supervisor for the scheduled callbacks.

Filter the View

Supervisor can click  icon to filter the callbacks.

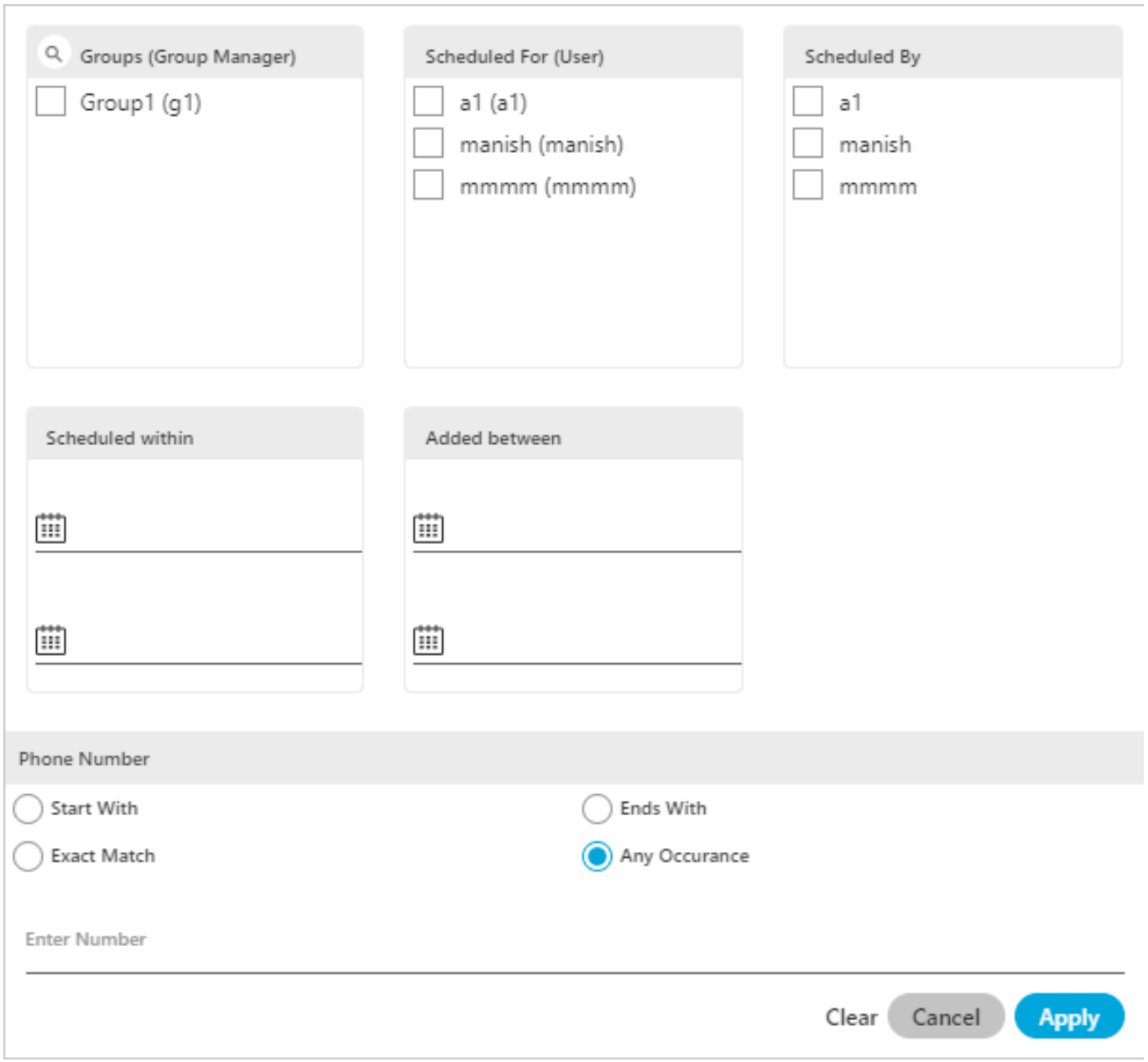


Figure: Filter Callbacks

It contains the following filters.

- **Groups (Group Manager):** Select the name of the groups and group managers to whom the scheduled callback agent is assigned in.
- **Scheduled for (User):** Select the users of which callbacks have to be displayed.
- **Scheduled within:** Select the time range in "From" and "To" for those callbacks which are scheduled in the given time range.
- **Scheduled By (User):** Select the users who created the callbacks.
- **Added Between:** Select the time range in "From" and "To" for those callbacks which are scheduled in the given time range.

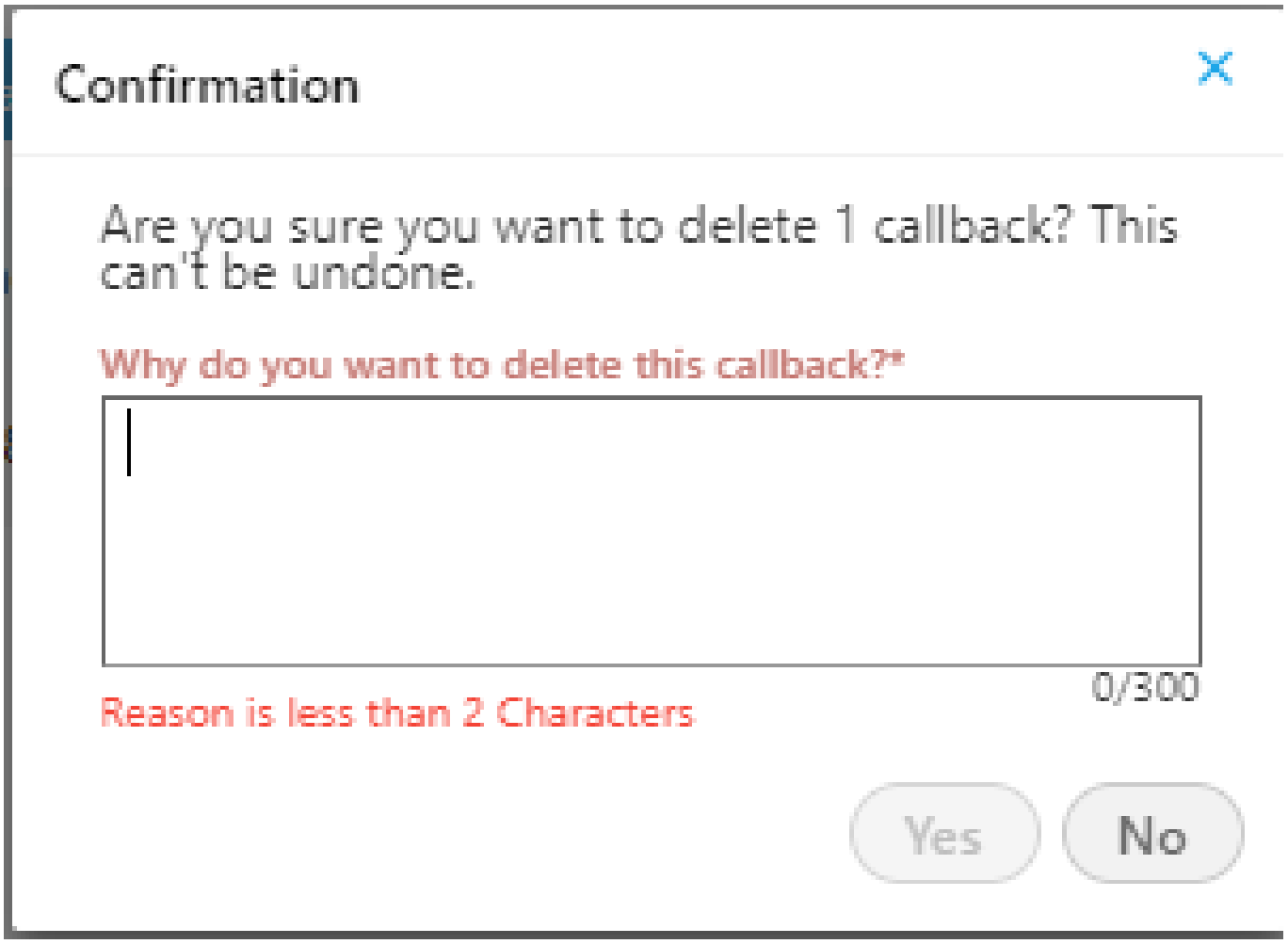
> There is no need to provide date and time from different places. All can be done through one place. Click at "Scheduled By (User)" or "Added Between" to provide date and time simultaneously.

- **Phone Number:** The supervisor can also provide the phone number of to filter the callbacks scheduled for that phone number.

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.

Delete Callback

Click "Delete" button to delete the selected callback. A pop-up arises in which you have to provide the reason for which you are deleting the callback. Without providing the reason, the callback will not delete.



Notification for the Scheduled Callback

A notification will be shown to the supervisor when a callback has been scheduled in the campaign. It contains the phone number for which the callback is scheduled, the campaign name and the time for which the callback is scheduled.

> If the number masking is enabled for that campaign, then it will mask the phone number in the displayed notification as well.

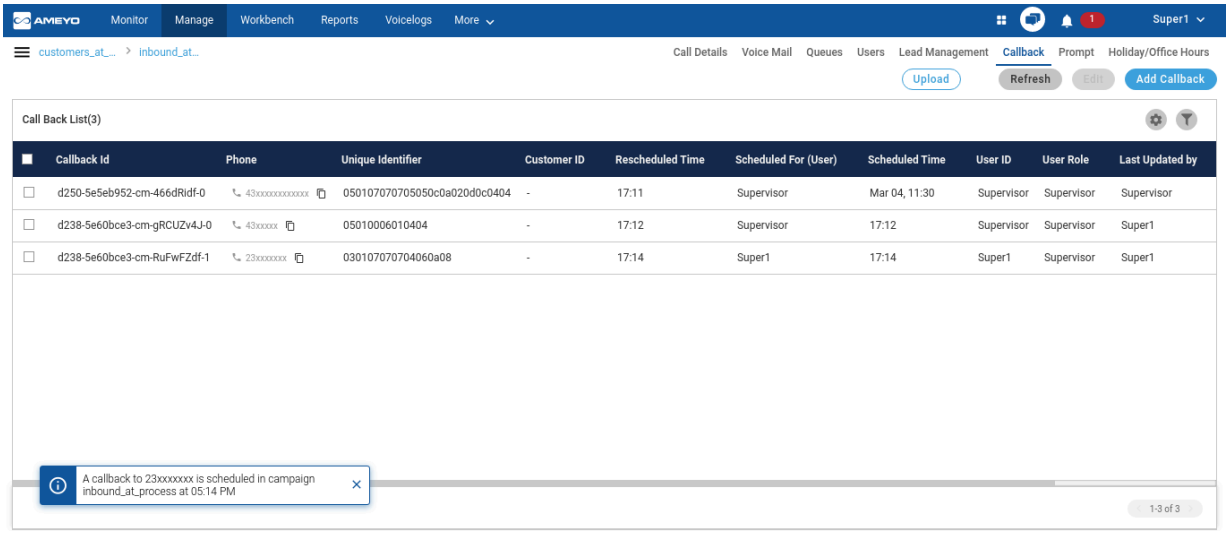


Figure: Callback Management in a Campaign

(Licensable) Bulk Migration of Callbacks between Campaigns

It is possible that those agents to which the callbacks are assigned has been moved to another campaign due to any reason. In such cases, the callbacks assigned to such agents can also be assigned back to them.

Perform the following steps.

1. In the "Callback" tab, the following screen is displayed on which you have to upload the CSV.

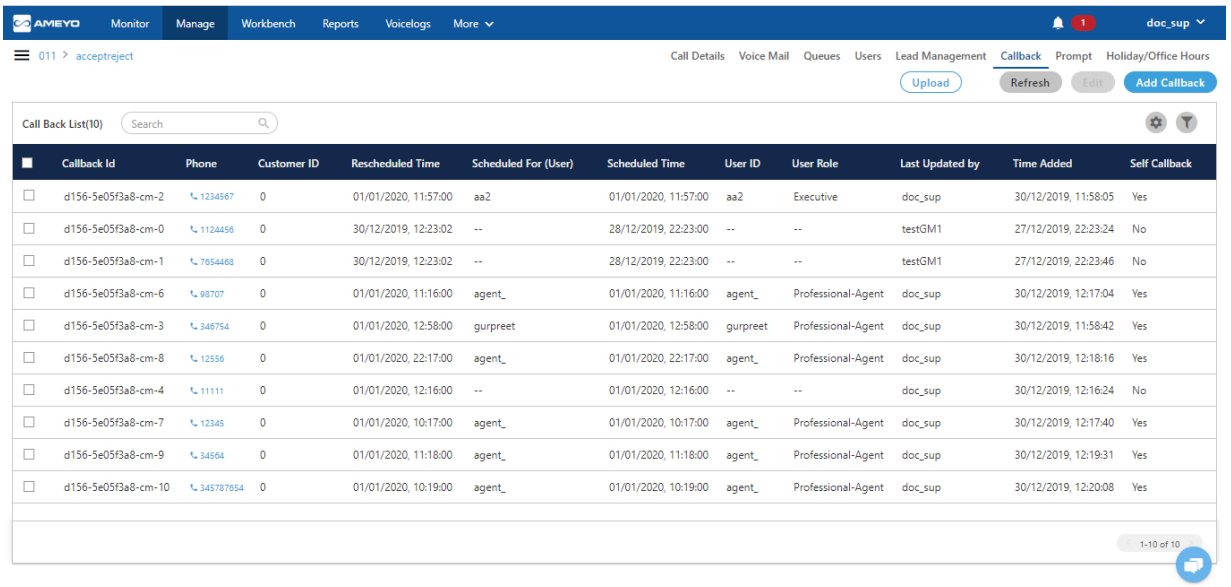
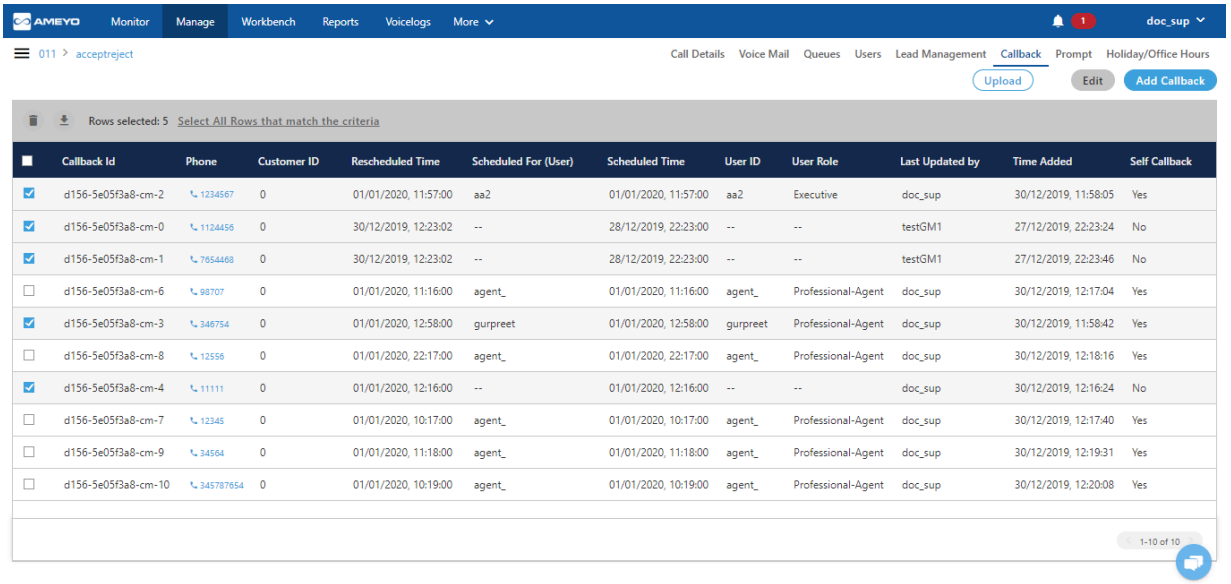


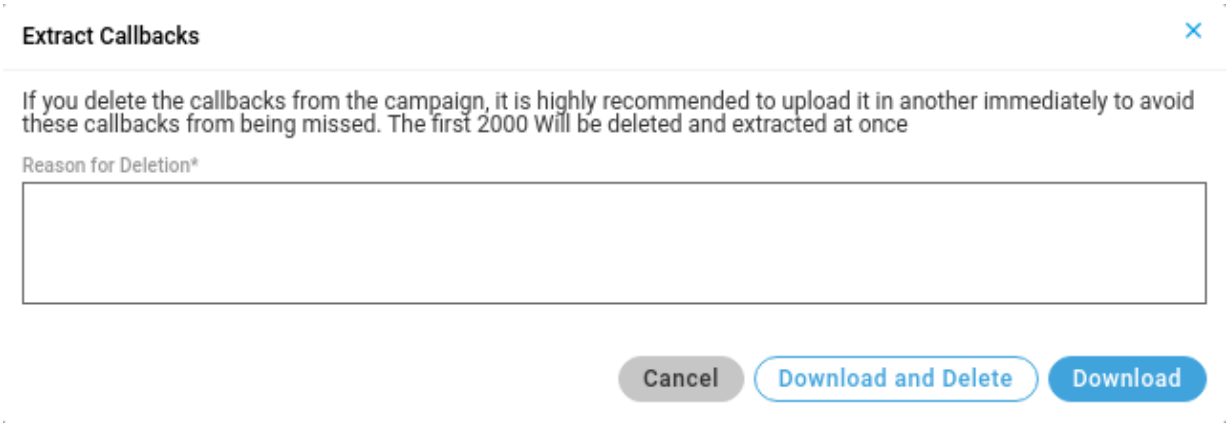
Figure: "Manage Callback" Page

2. Select the callbacks that have to be downloaded.



- The supervisor can select a maximum of up to 10,000 callbacks at a time.
- On a single page of callbacks, only 10 records are displayed. If you want to select all the records which are not visible on the page, then you can click "Select All Rows" link. It will select all the rows of callbacks.

3. Click  icon to export or extract these callbacks. It shows the following modal.



4. Provide a reason to export or extract the callbacks.
5. Click "Export" to export the callbacks and download them to a CSV file.
6. Click "Extract" to export the callbacks to a CSV file and delete them from Ameyo System.This option is based upon "Save As" functionality of the Web browser. If "Ask where to save each file before downloading" or similar option is not checked, the CSV file will be saved at the default download location of the Web browser, of which name is "CallDetails". In this case, the Supervisor or the Group Manager does not get the option to change the name and path of the file.

> It is recommended to keep the option "Ask where to save each file before downloading" checked so that you can specify the name and path to save the files.

If "Ask where to save each file before downloading" option is checked, then the following dialog box is displayed while saving the CSV file.

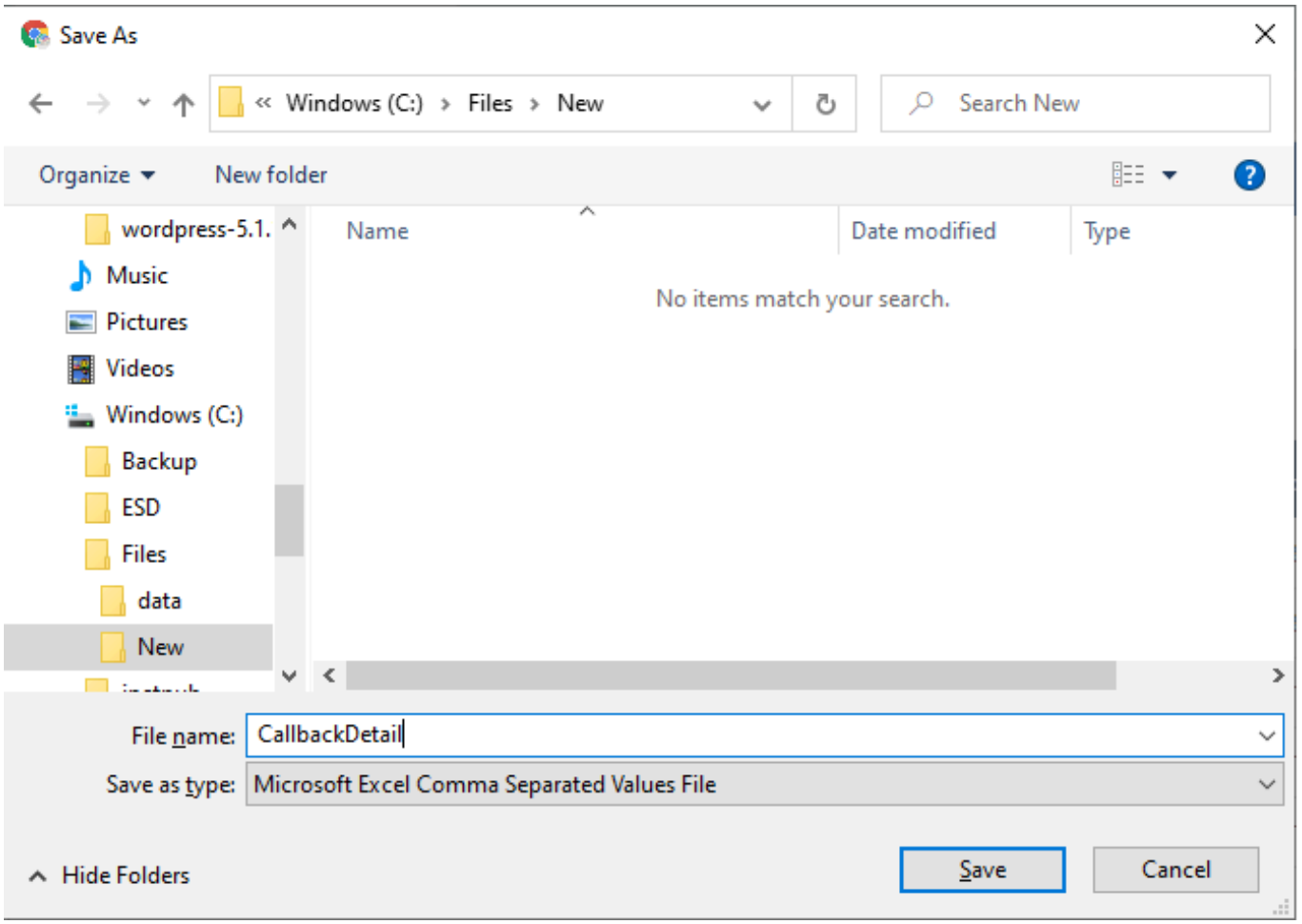
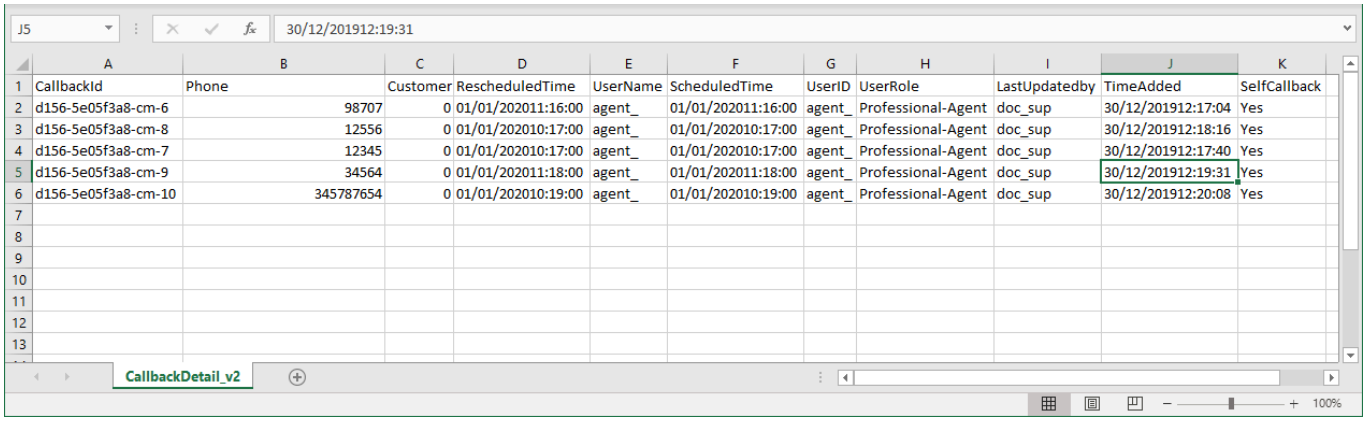


Figure: Save CSV File

7. The following screenshot shows a sample CSV.



	A	B	C	D	E	F	G	H	I	J	K
1	CallbackId	Phone	Customer	RescheduledTime	UserName	ScheduledTime	UserID	UserRole	LastUpdatedby	TimeAdded	SelfCallback
2	d156-5e05f3a8-cm-6	98707	0	01/01/202011:16:00	agent_	01/01/202011:16:00	agent_	Professional-Agent	doc_sup	30/12/201912:17:04	Yes
3	d156-5e05f3a8-cm-8	12556	0	01/01/202010:17:00	agent_	01/01/202010:17:00	agent_	Professional-Agent	doc_sup	30/12/201912:18:16	Yes
4	d156-5e05f3a8-cm-7	12345	0	01/01/202010:17:00	agent_	01/01/202010:17:00	agent_	Professional-Agent	doc_sup	30/12/201912:17:40	Yes
5	d156-5e05f3a8-cm-9	34564	0	01/01/202011:18:00	agent_	01/01/202011:18:00	agent_	Professional-Agent	doc_sup	30/12/201912:19:31	Yes
6	d156-5e05f3a8-cm-10	345787654	0	01/01/202010:19:00	agent_	01/01/202010:19:00	agent_	Professional-Agent	doc_sup	30/12/201912:20:08	Yes

Figure: Sample CSV File containing the callbacks

Upload the Callbacks

Perform the following steps to upload the callbacks.

1. Click "Upload" to upload the callbacks. It shows the following modal.

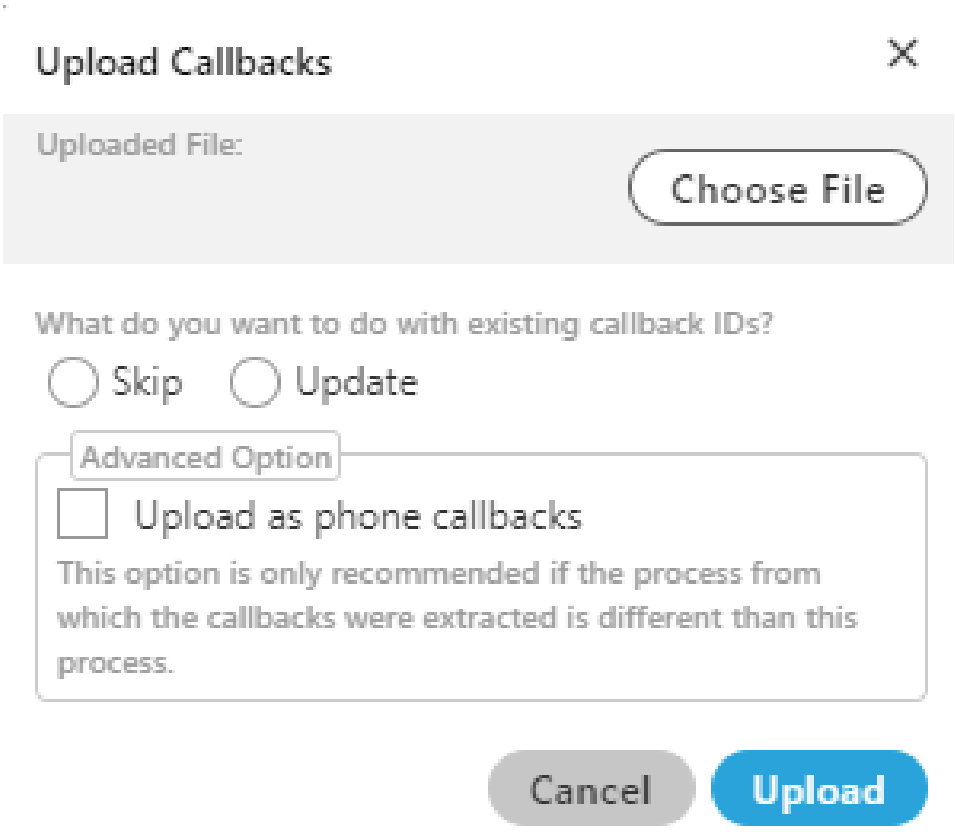


Figure: "Upload CSV" Modal

2. Click "Upload" to upload the CSV files to add the callbacks. It shows the following modal.

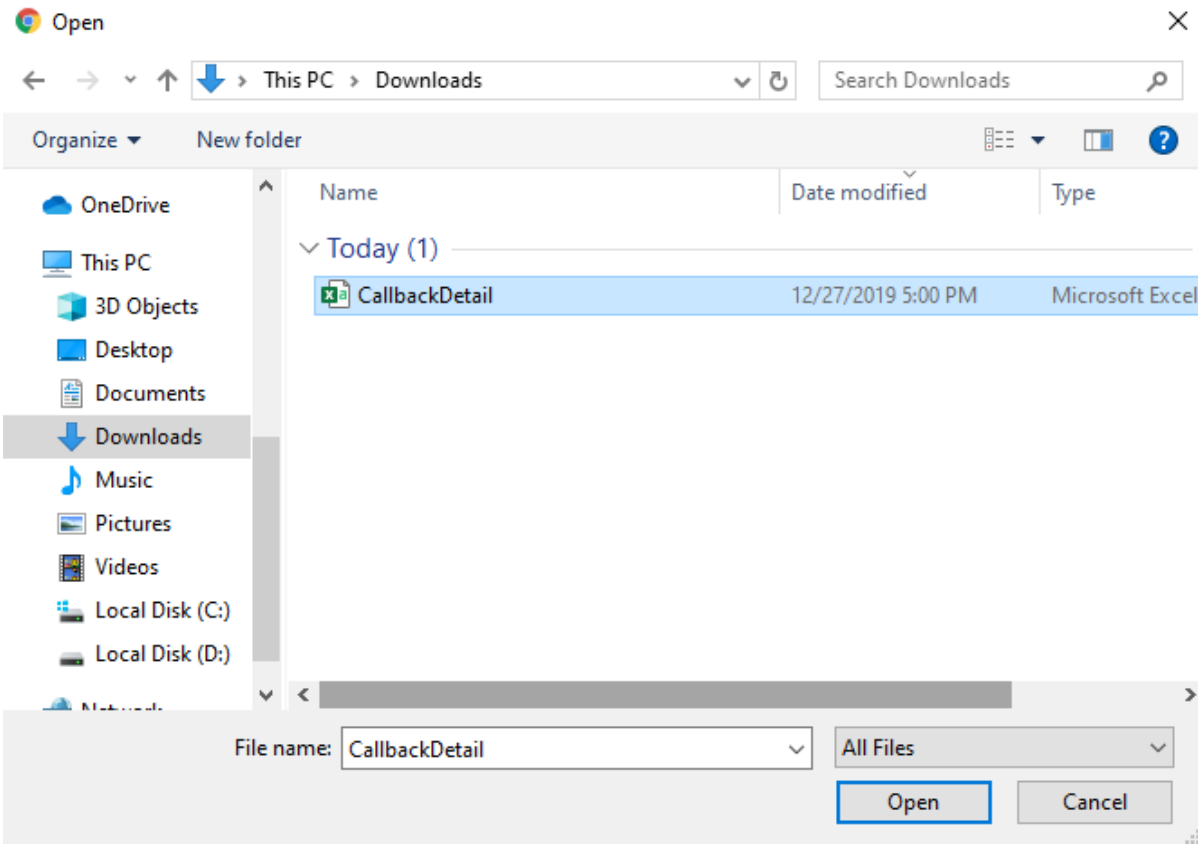


Figure: Dialog Box to open the file

3. Select the location where you have saved the file.
4. Select the CSV file and click "Open" to open the file.
5. CSV file is selected in "Upload CSV" Modal.

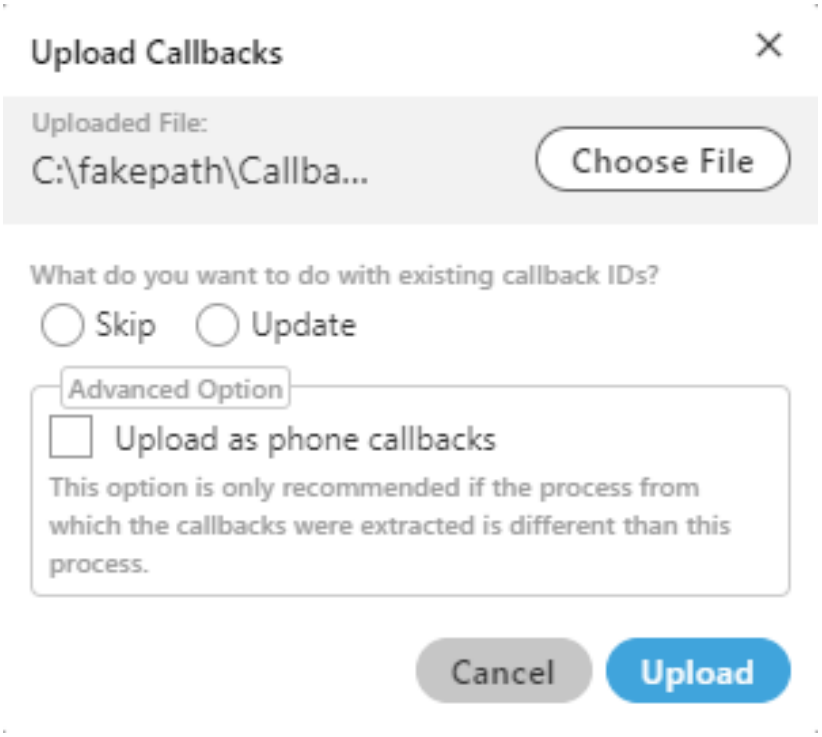


Figure: Dialog Box to open the file

6. Select any of the following options.
    - **Skip:** Select it to skip any operation to be done on the callback-id, that is, all the Callback IDs will be the same as used before.
    - **Update:** Select it to update the callback-id for those callbacks which have been updated in the CSV file.
    - **Upload as phone callback:** Enable this feature if all the callbacks which you have uploaded are phone calls. It is recommended to use this option only when the process is different while uploading.

7. Click "Upload" to upload the callbacks else, click "Cancel" button. The uploading process takes some time, depending upon the size of the callbacks. The following notification pop-up is displayed now, which contains the list of errors or number of records that are uploaded successfully.

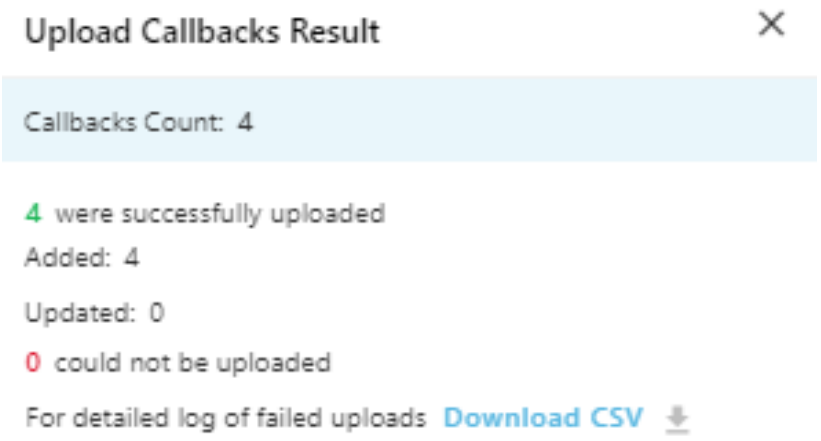


Figure: Uploaded the Callbacks

8. If there is any error while uploading the callback CSV, then the supervisor can download the CSV for failure reasons, if any.
9. Once the callbacks have been updated, a notification is sent to all the supervisors and agents of that campaign.

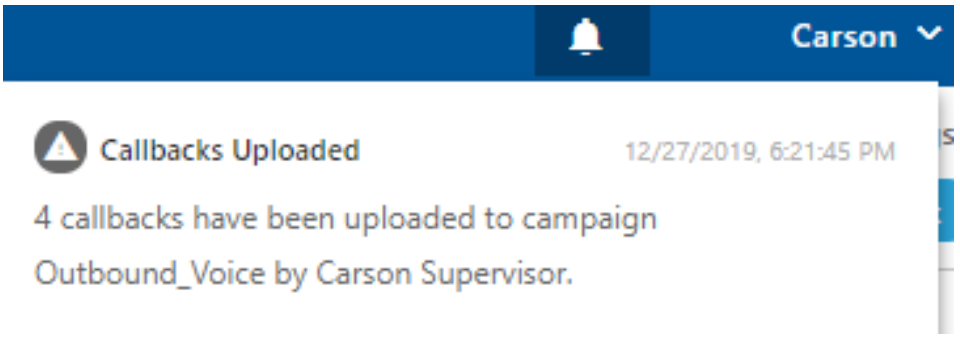


Figure: Notification of Uploading the Callback

If the uploading time of callback is greater than the scheduled time of callback, then the callback will schedule to the present time.

For Example:

Suppose, the callback scheduled time is 11:00, but the callback is extracted and deleted at 10:00, and it is uploaded at 12:00, then the callback time will schedule automatically to the present time, that is, 12:00.

Changing the User Assignment of Callbacks in Bulk

There is a possibility that the agent is not present, transferred to another campaign or left the job. In such cases, the callbacks assigned to that agent will remain unfollowed. In such cases,

the supervisor can assign these callbacks to another agent, so that the callbacks will not be left unfollowed.

Select those callbacks which have to be modified.

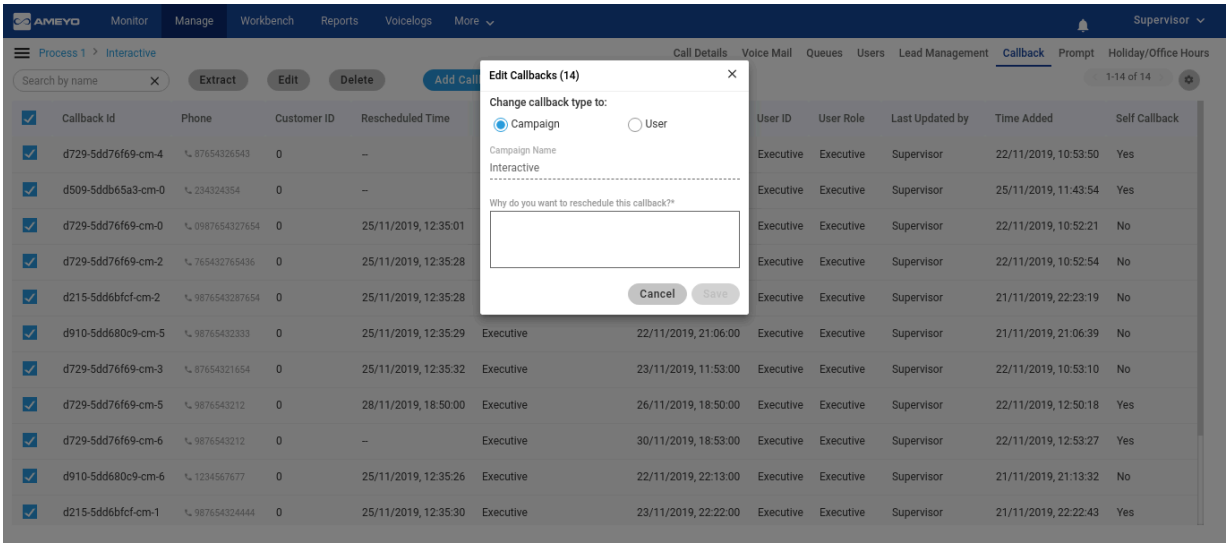


Figure: Bulk Edit of Callbacks

The Supervisor or Group Manager has to select the callbacks in "Callbacks" Tab and click "Edit" button to edit these callbacks in bulk. Here, you can either promote the callbacks to "Campaign" or change the user assigned to these callbacks. If the callbacks are already assigned to the multiple users, then a message is displayed in "Edit Callback" modal.

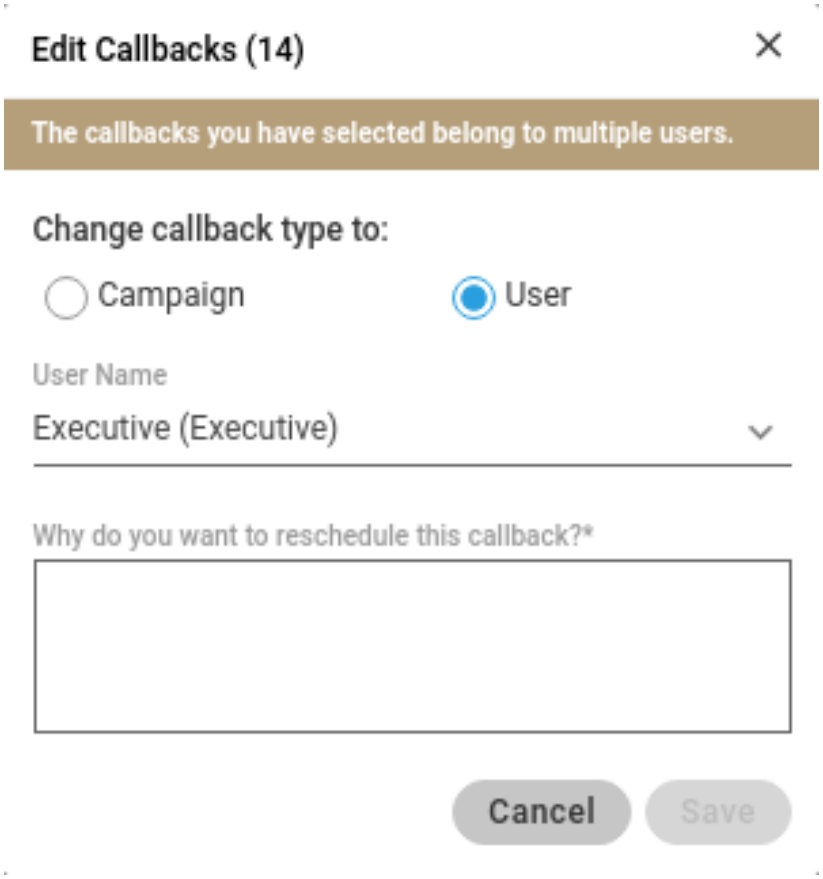


Figure: Bulk Edit of Callbacks already assigned to the multiple users

If bulk callbacks have been assigned to a user and that the user has been unassigned from the campaign, then the Supervisor still can see and manage the scheduled callbacks assigned to that user.

Toast Notifications

If the Supervisor or Group Manager changes the user assignment of the callbacks, then a toast notification is displayed to them.

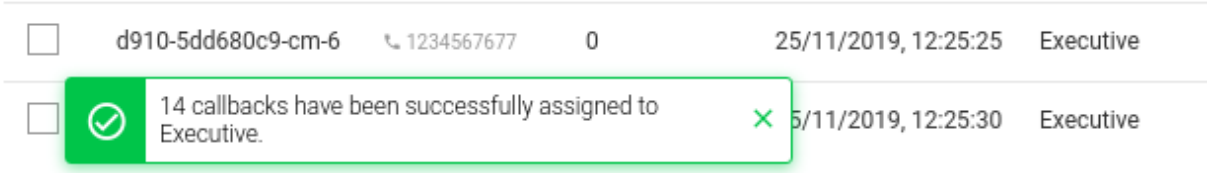


Figure: Toast Notification on the successful bulk operation

If the Supervisor or Group Manager tries to change the user assignment of the callbacks more than the configured limit, then the toast notification displays the error message.

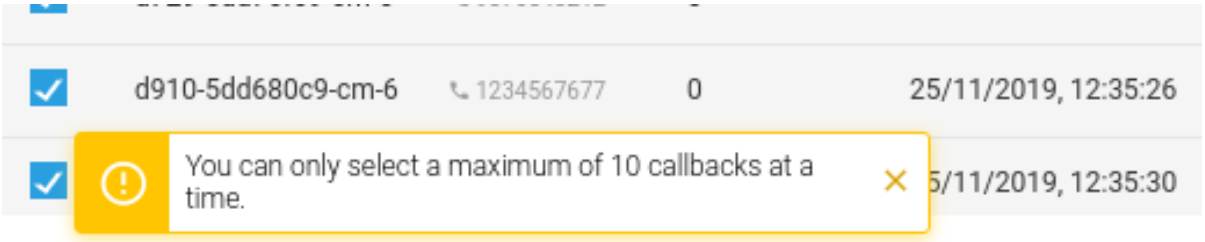


Figure: Toast Notification shows the error when the callbacks more than the limit are being tried

Notification to the User Consoles

If a user is assigned the callbacks in bulk, then a notification is displayed to the console of that user.

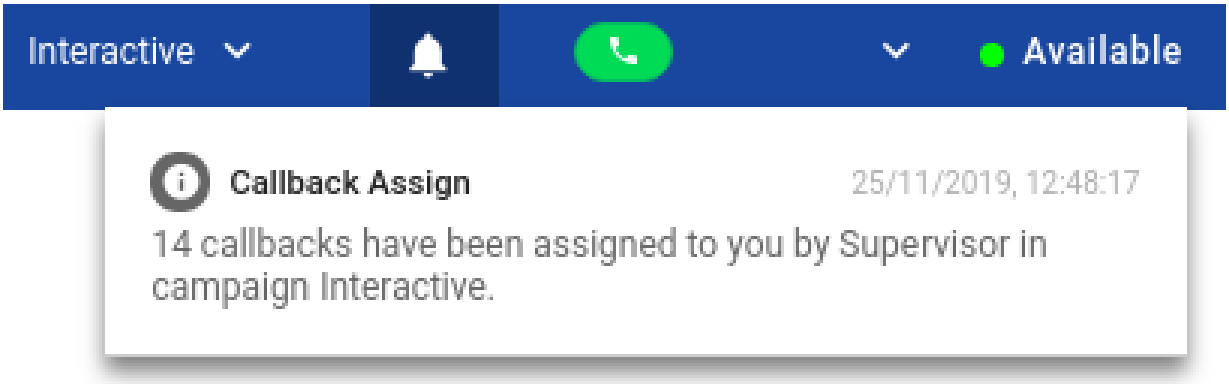
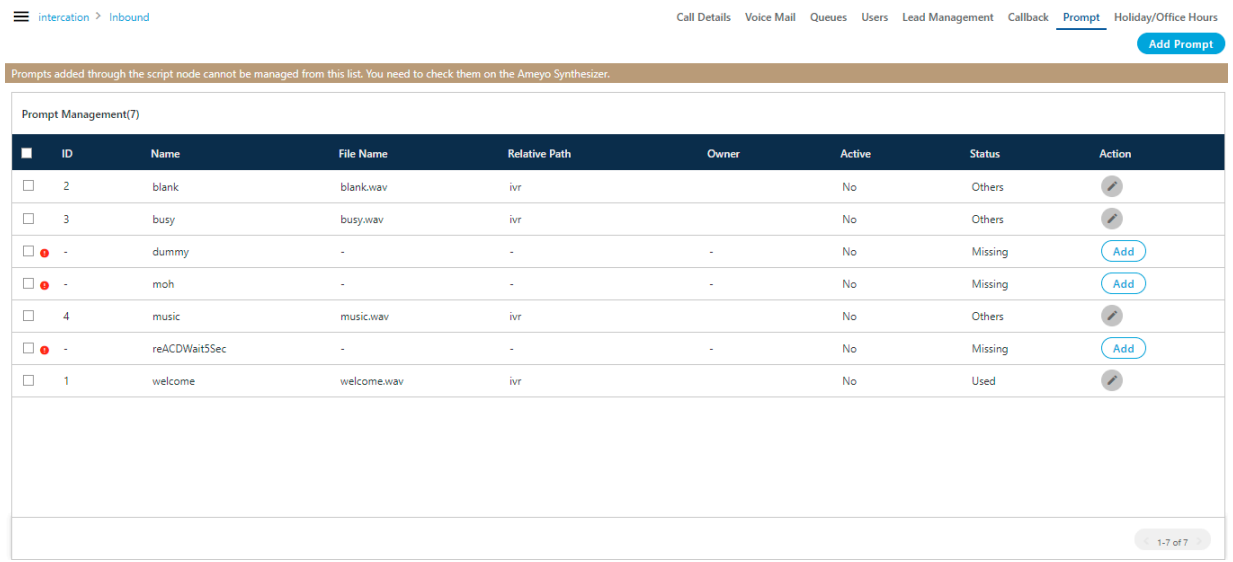


Figure: Notification to the Agent upon assignment of the bulk callbacks

Notification will be displayed to all Supervisors in case of bulk update of callbacks. If a user has been assigned multiple callbacks then a notification will be displayed to the user.

19.2.5.1.5. Prompt Management

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



> It shows the prompts that are already added by the Administrator in its console at the Campaign-level. It also displays all the missing prompts whose voice message files are not present.

The status column shows the status of the prompt. There are three types status for prompts:

1. **Used:** It means that the prompt is in use.
2. **Unused:** It means that the prompt is not in use.
3. **Missing:** It means that the prompt voice file is missing, but the prompt is being created.

A visual red dot indentation is present at the front of the missing prompts. The user can also hover over this icon to view the information about the missing prompts.

Supervisor can perform the following operations here.

Add Prompt

The Supervisor can upload the voice prompts. Uploaded prompts will be used in the IVR.

Perform the following steps to create a Prompt.

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

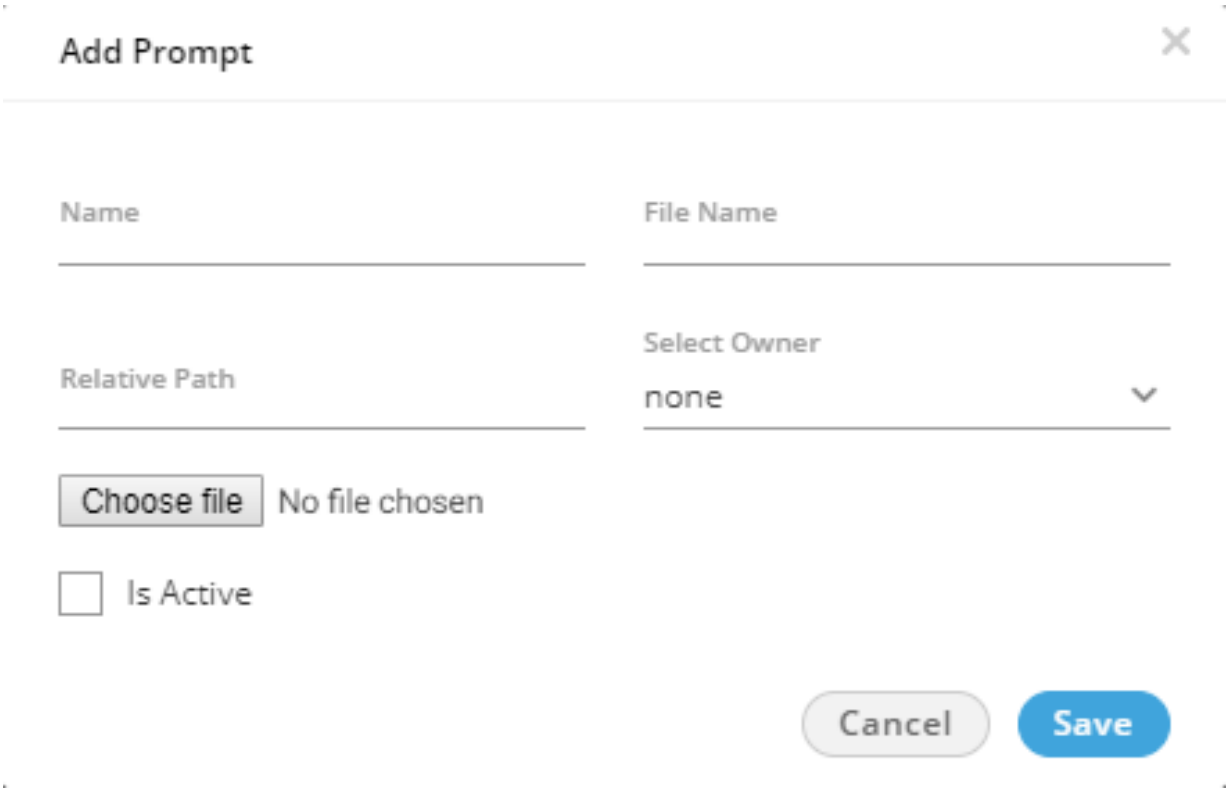


Figure: Add a Prompt

2. Provide a name for the prompt.
3. Provide a name of the sound file, that you are going to upload. The name should contain the file's extension as well, like "**welcome.wav**".
4. Provide a name for a folder, in which the sound file will be stored. This folder will be created on the server and, if it exists already, the file will be saved into it.
5. Click "Choose File" button to select the sound file from your disk. A pop-up comes up. Select the file for the prompt and then click "Open" button to upload the file in "wave Sound" format.

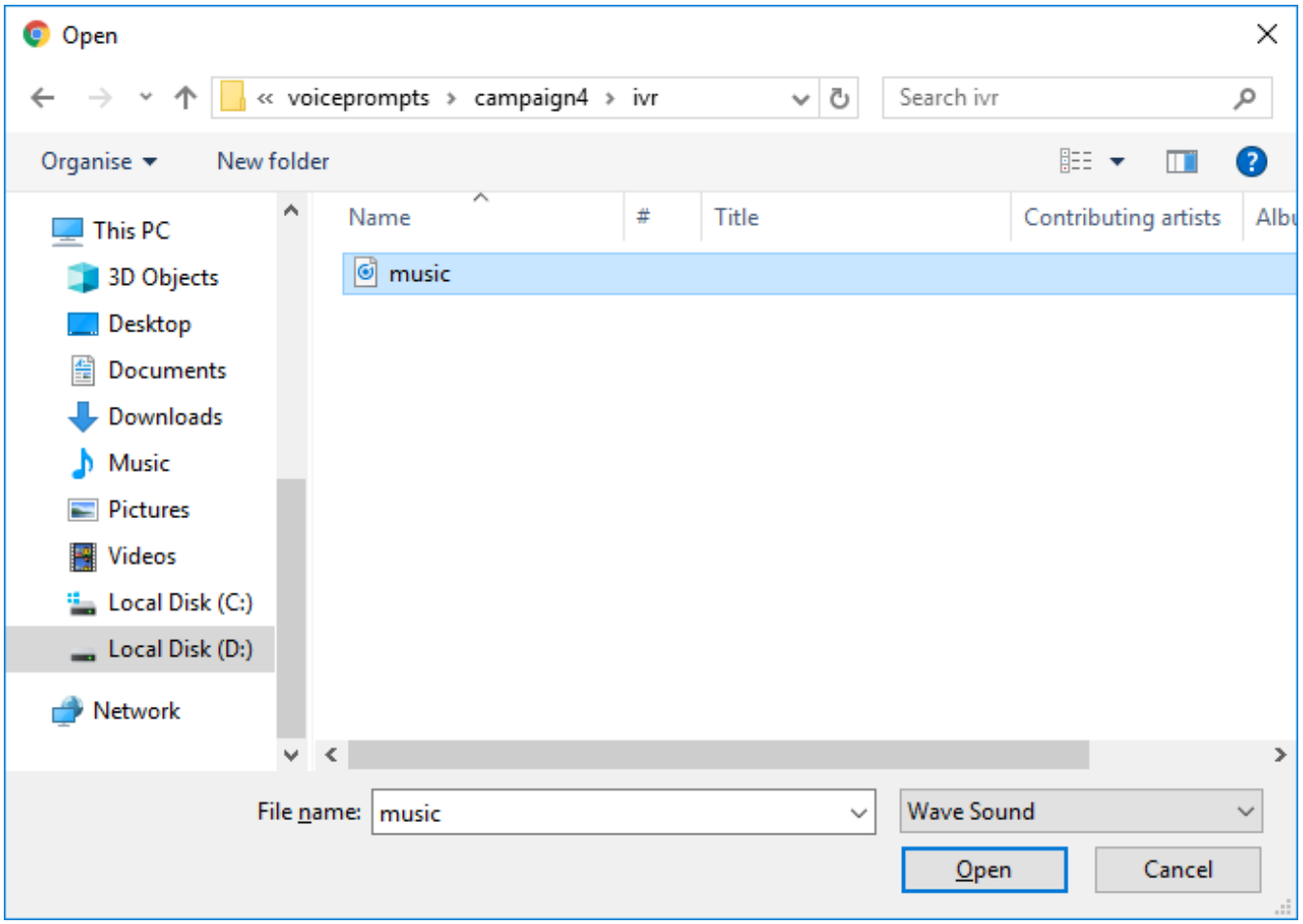


Figure: Upload Prompt

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.

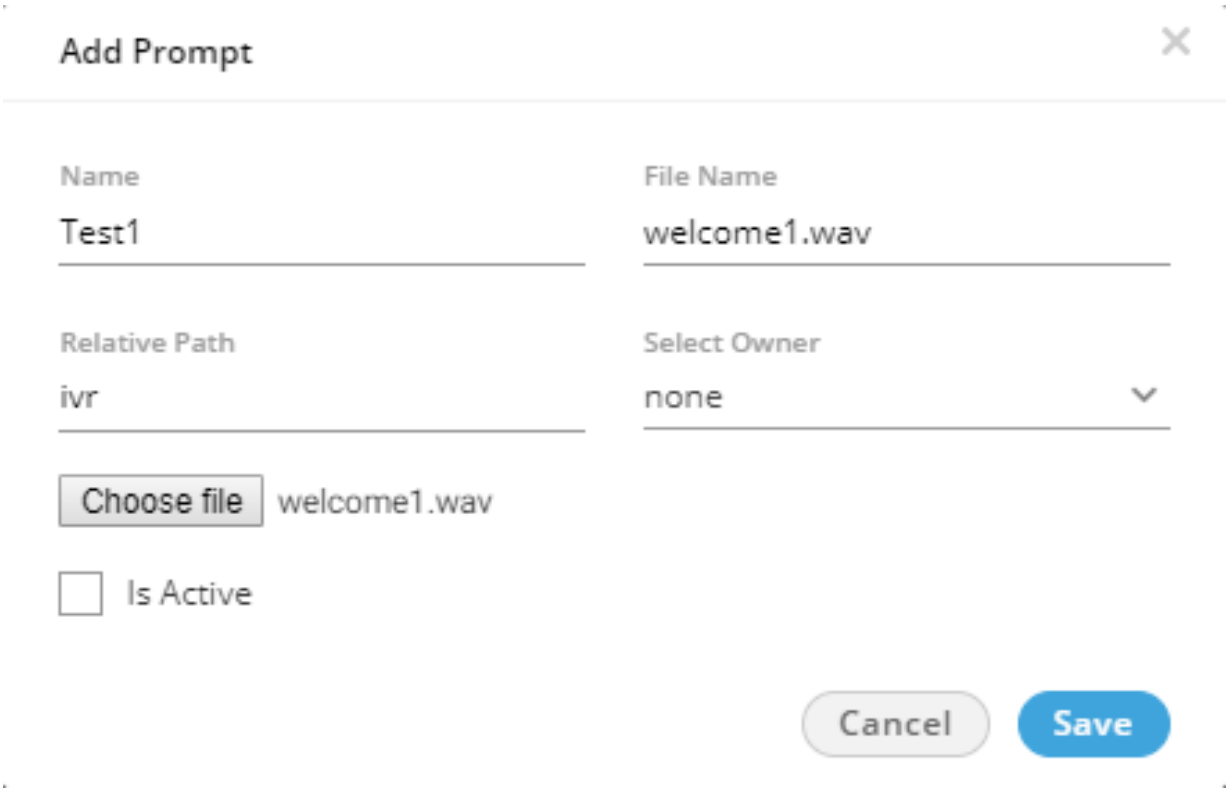


Figure: Adding Prompt with Sample Details

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.

Compatibility List

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

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

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

Edit Prompt

Supervisor can edit the prompts as well. But, non-editable prompt names can not be edited by the supervisor. In order to edit a prompt, perform the following steps.

1. Select the prompt which you want to edit. A pop-up similar to adding a new prompt opens up.

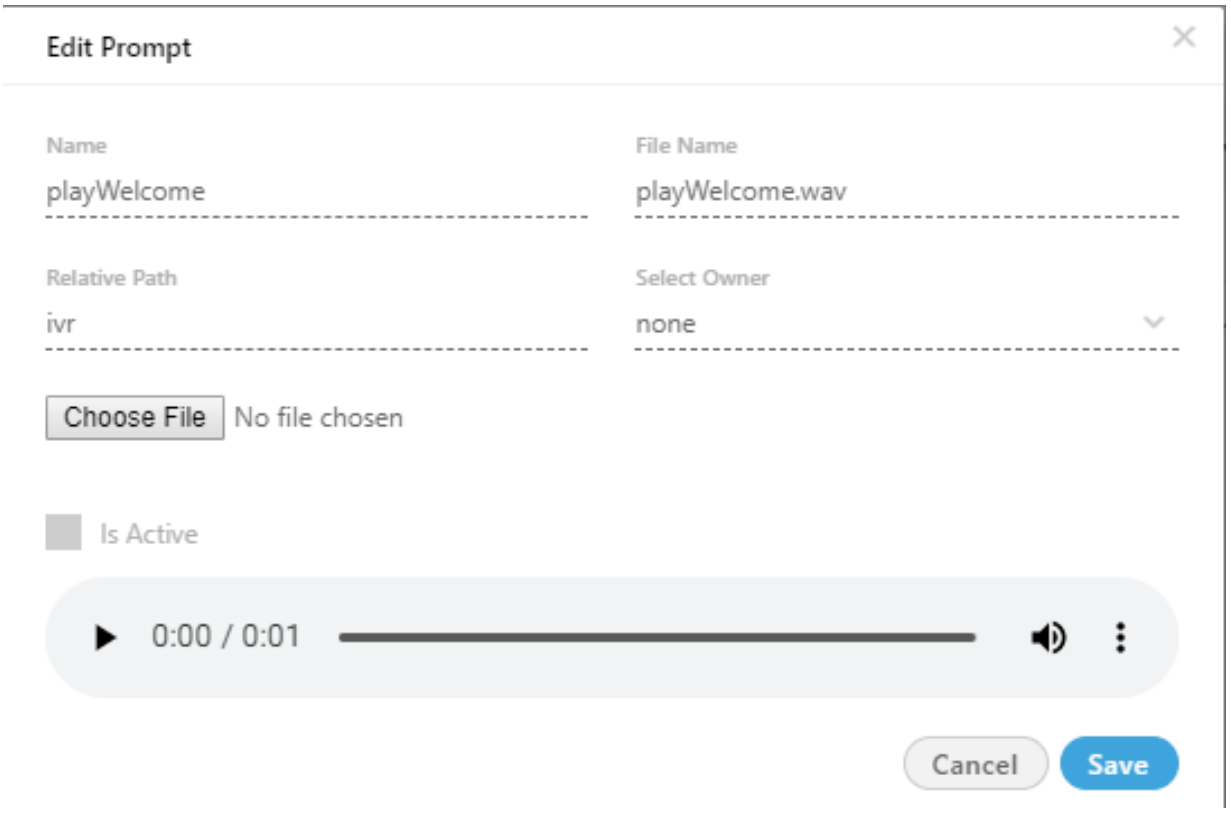


Figure: Editing Prompt

2. Click "Choose file" button to upload the new prompt file in wave format. A pop-up comes up.

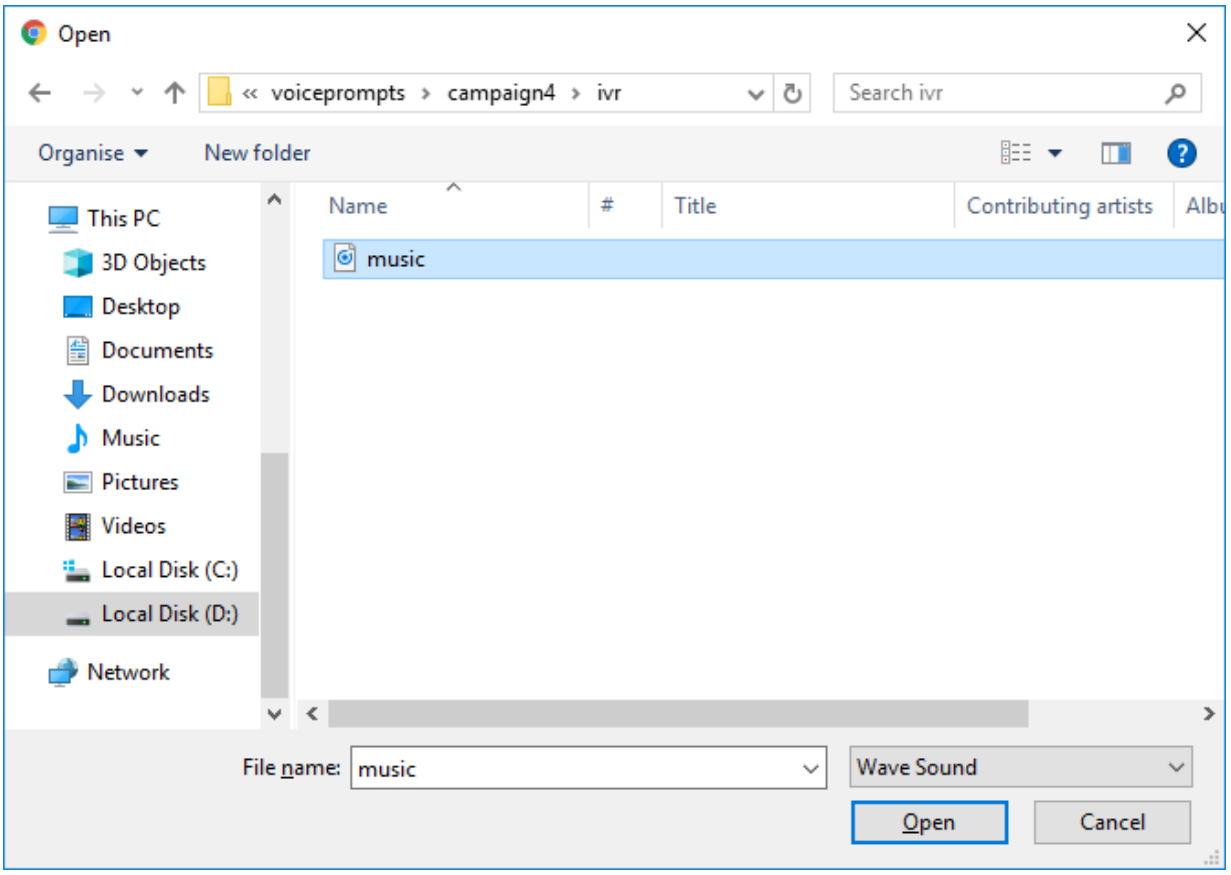


Figure: Upload Prompt

1. Select the prompt file in wave format and click open button.
2. After the prompt file selection, click "Save" button to save the changes made, else click cancel to cancel the changes.

Supervisor can not change any other information except the prompt file.

Delete Prompt

Perform the following steps to delete any prompt.

1. Select the prompt file which you want to delete.
2. Click "Delete" button present on the right top corner of the screen. A confirmation pop-up comes up.



3. Click "Yes" button to delete the prompt from the system permanently, else click "NO" button to revert back the deletion process.

Once you delete the prompt, it will delete from the system permanently and it can not be recovered in any manner.

Identification of Missing Prompts

Whenever a customer calls a business, every voice message that is played is known as prompts. But there are some prompts whose voice message file is not present. Such prompts are called missing prompts. These prompts are shown to the user on UI, but they are not useful as their prompt is not uploaded. Thus to identify such prompts, missing prompt icon and status has been introduced in Ameyo.

On the Prompts tab of Administrator and Supervisor, a new status column has been introduced. This column's values show whether the prompt is in use or missing, as shown in the following screenshot.

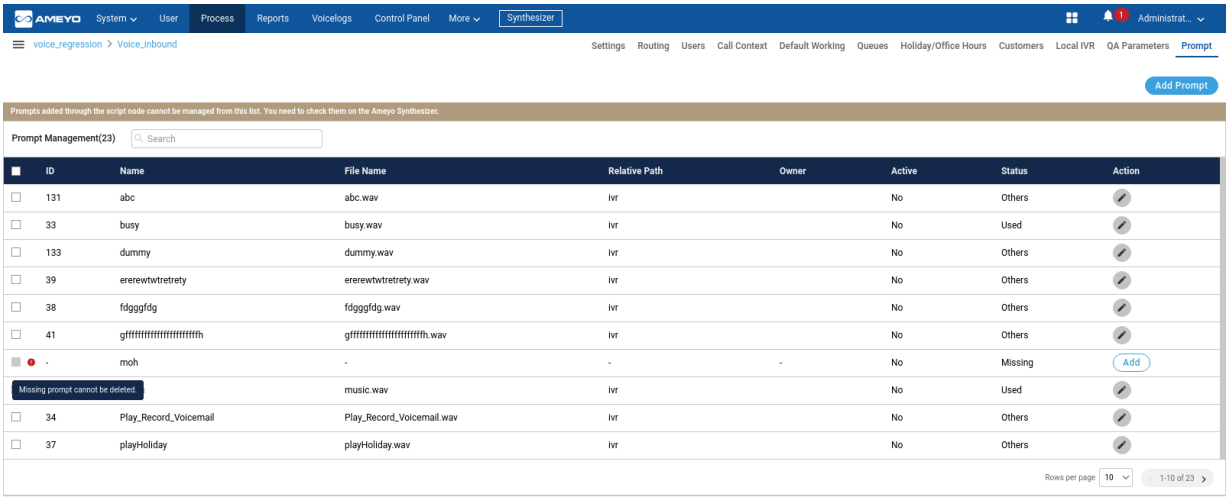


Figure: New Interface of Prompt Tab

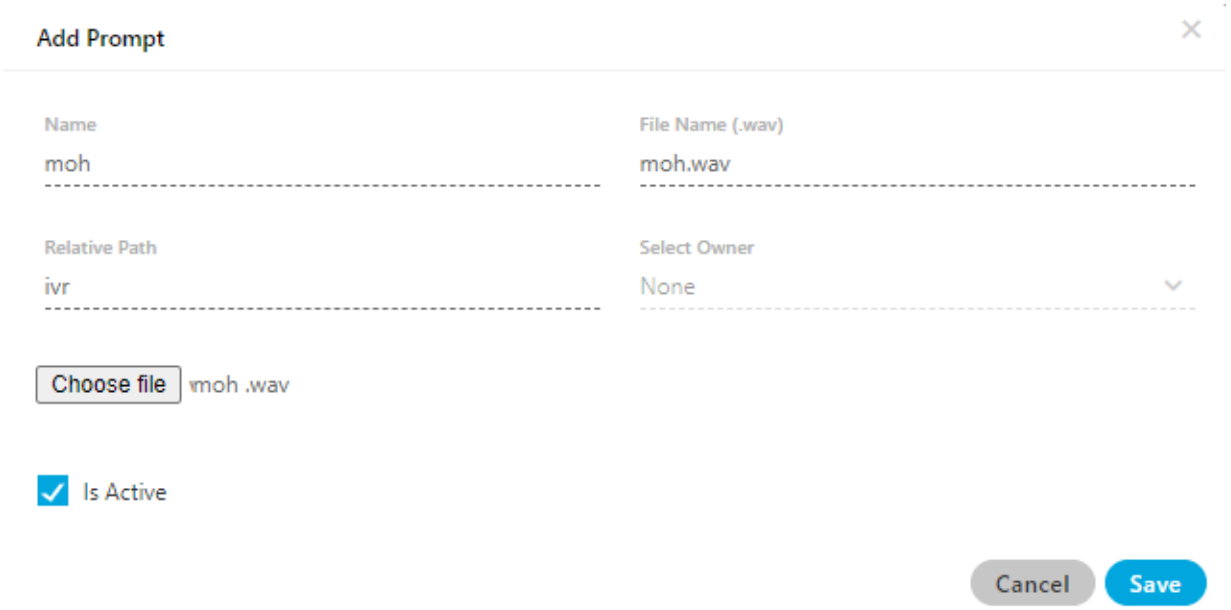
A new status column is introduced, which shows the status of the prompt. The following three status have been used to monitor the prompts:

1. **Used:** It means that the prompt is in use.
2. **Unused:** It means that the prompt is not in use.
3. **Missing:** It means that the prompt voice file is missing, but the prompt is being created.

A visual red dot indentation is present at the front of the missing prompts. The user can also hover over this icon to view the information about the missing prompts.

Non-editable Prompt Name

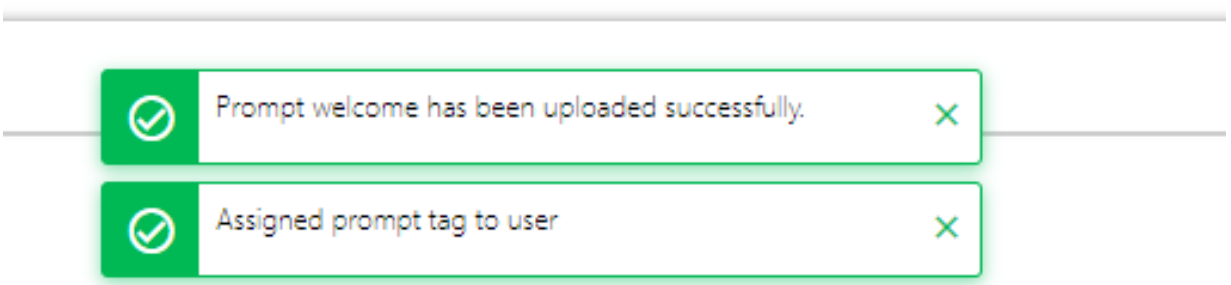
A modal is shown when the user click "ADD" button present in front of the missing prompt. The name textfield of this modal is non-editable, which means that the user is not able to edit the name of the prompt.



Notification for Uploading a Prompt file

If the supervisor uploads the nodeflows to the missing prompt files, then a notification will be sent to the administrator and supervisor at the same time. The following types of notifications will be sent to the administrator and supervisor for uploading the nodeflow file.

1. A toast and bell notification is sent to the administrator.
2. The supervisor has received a bell notification.



The notification shows the campaign and prompt name in which the nodeflow has been uploaded. The administrator will be redirected to the prompts tab after clicking the notification.

After the creation of the missing prompt, the missing prompt's status will be changed to used/unused accordingly.

A warning is also being displayed at the top of the prompts tab, which states that:

Prompts added through the script node cannot be managed from this list. You need to check them on the Ameyo Synthesizer.

The notification will only be sent to the Group Manager and Analyst user roles. They are not able to update or click it.

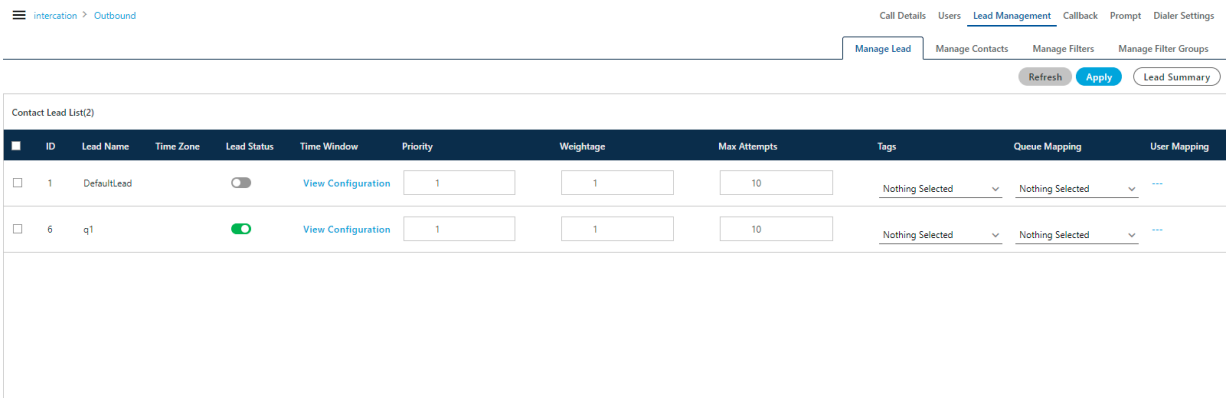
Missing Prompts are as such not an entity, thus there is no option to delete them.

19.2.5.2. Manage Outbound Campaign

19.2.5.2.1. "Manage Lead" Tab in Lead Management

Manage Lead

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



> The total number of leads which you can enable at any instant of time, is the licensable feature which is configured by the administrator. Ask your administrator for further information on the same.

Here, Supervisor can perform the following operations.

Supervisor has to map the lead with the queue. This feature is licensable, hence ask your administrator about the license of it.

Tags (Licensable)

The supervisor can tag the lead with the users. Click the drop-down list of the tags to tag the user for the leads.

For example, In a case of a collection process, the supervisor can assign a particular lead to a specific agent by selecting Tags as Self. It helps agents to follow-up with their customers and produce efficient results.



Figure: Tag a Lead Options

The tagging contains the following options.

1. **Nothing Selected:** No tag will be applied on the lead list.
2. **Absentee:** If a lead list is marked as "Self," then the user selected in "User Mapping" will get all calls for this lead list. The Supervisor can click "--" link in "User Mapping" for a lead list for which the "Self" tag is selected to select the user who will get the calls of this lead list.
3. **Review:** If a lead is mapped to a user, but now the agent is not available to attend the calls. Then The Supervisor can manually tag the lead as "Absentee." The Supervisor can take the decision not to use this lead of now, and if it has to be used, then the calls can be manually routed to other available agents.
4. **Self:** A The Supervisor can mark a lead list as "Review" manually and remove this tag after conducting the review.

After selecting any of the above tags for the available leads, click "Apply" to apply the changes.

Queue Mapping (Licensable)

Select the Queue name from the drop-down menu in the "Queue Mapping" column and click "Apply" button.

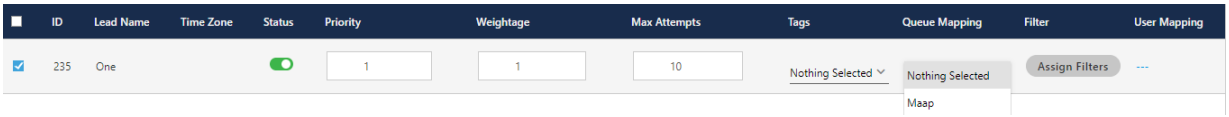


Figure: Queue Mapping in Lead

Enable or Disable the Lead

Supervisor can enable or disable the Lead from the Status toggle bar present corresponding to the TimeZone of the lead name.

Click  switch to enable the lead.

Click  switch to disable the lead.

View Lead Summary

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

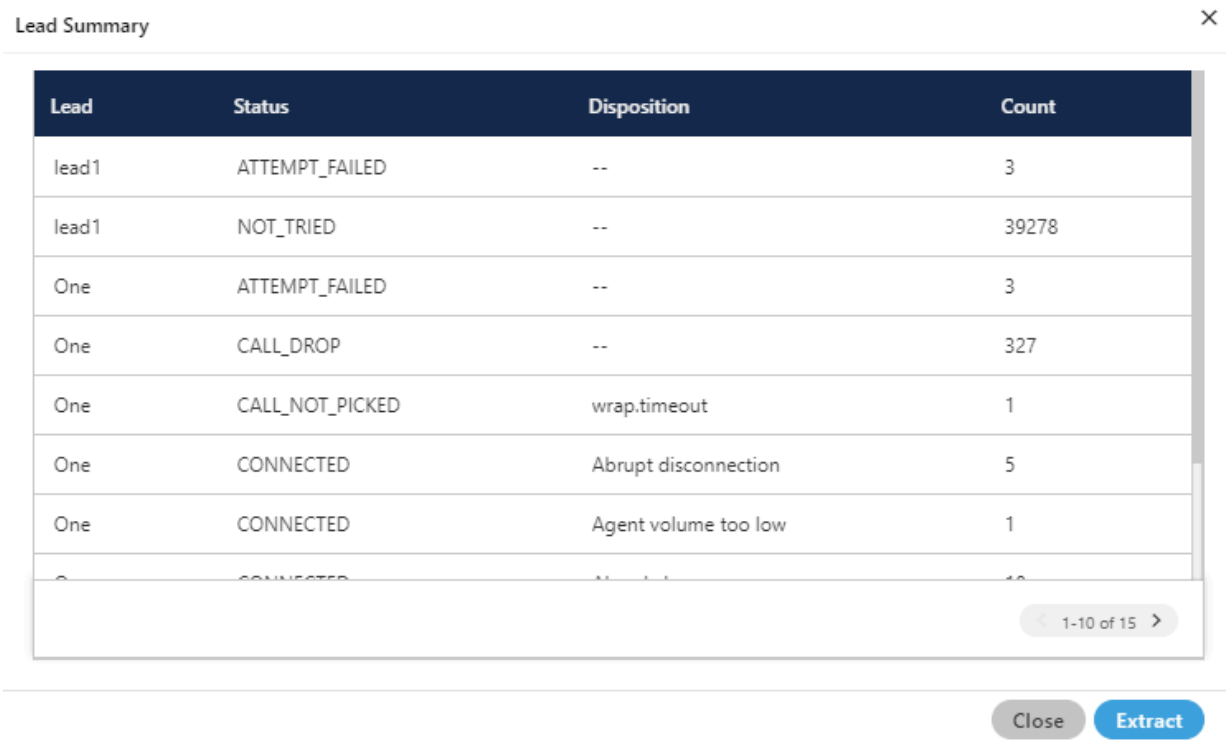


Figure: Lead Summary

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

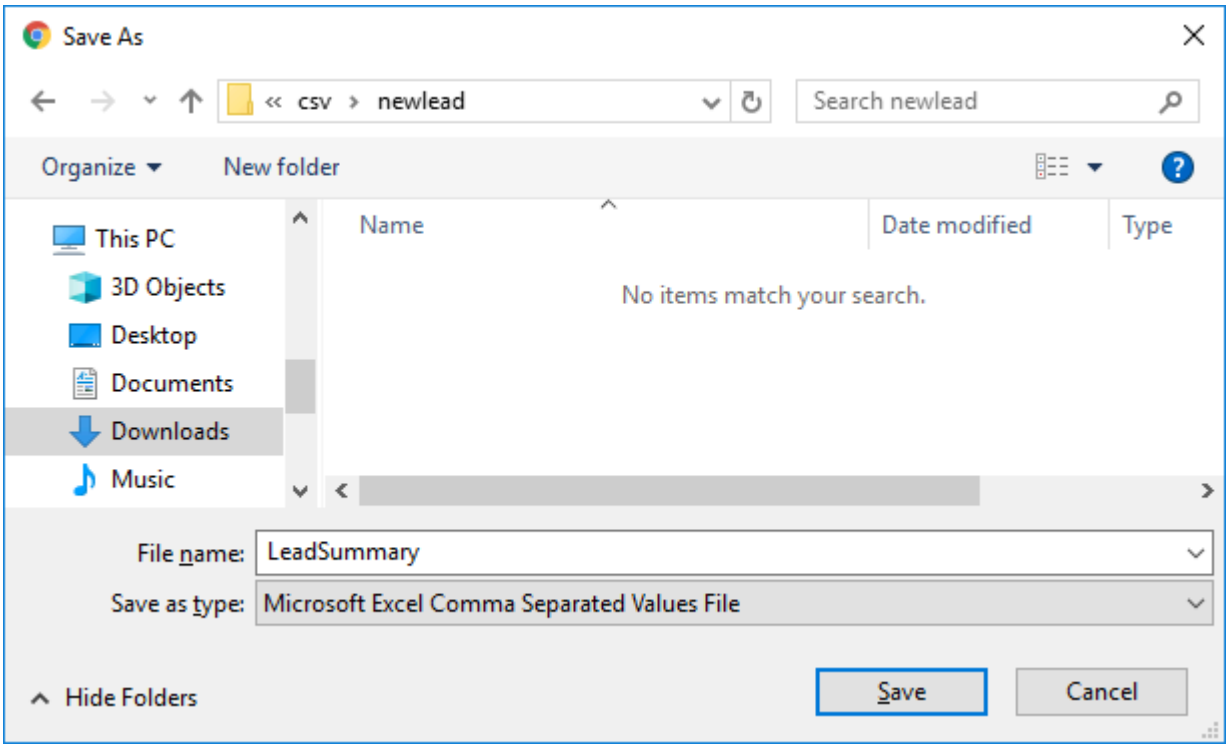


Figure: Lead Extraction

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

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.

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.

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.

Assign Filters

Supervisor can assign or unassign the filter from any lead. Click "Assign Filter" button to assign or unassign the filter to the lead.

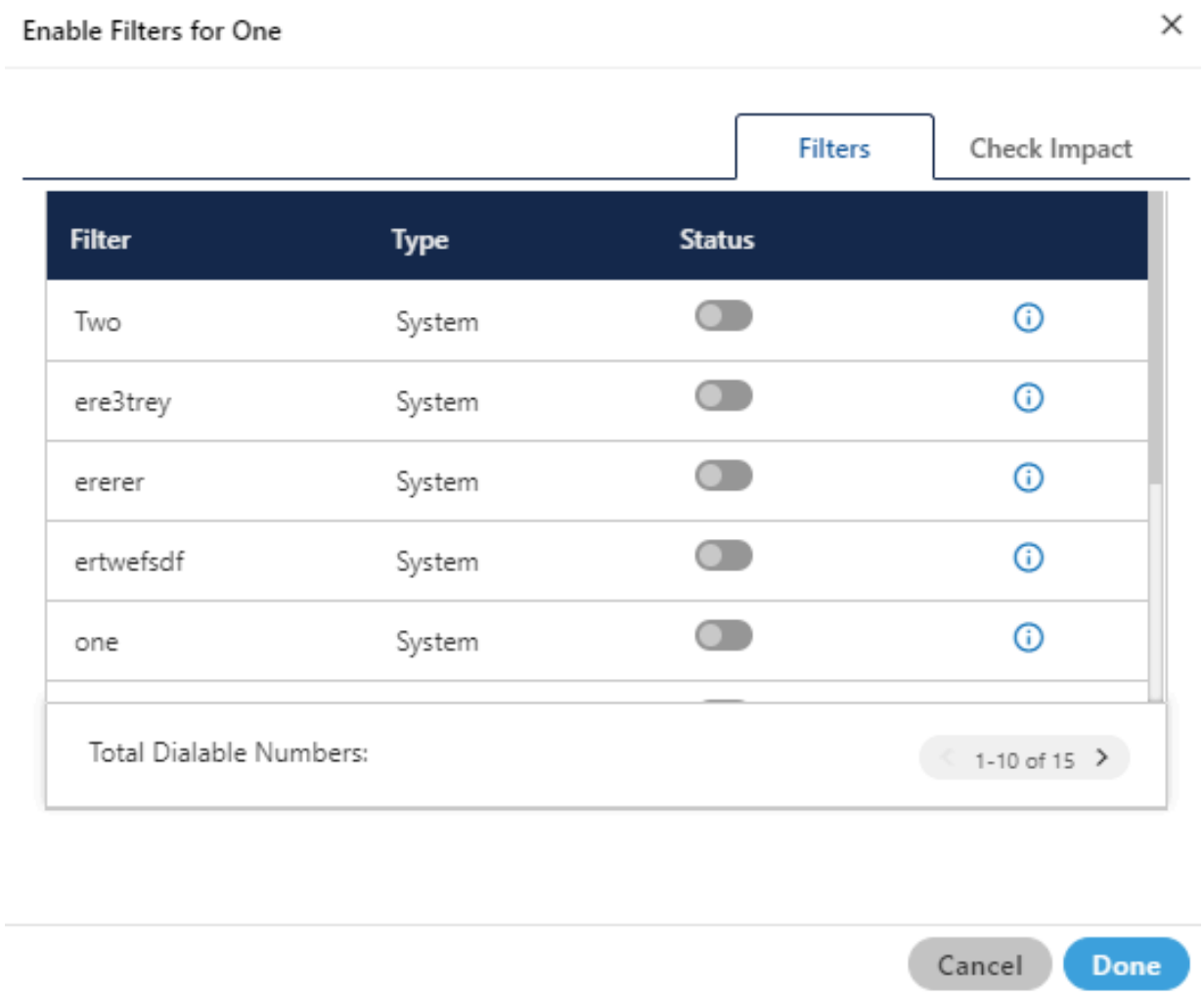


Figure: Assign the Lead Filter

1. For the very first time, "Total Dialable Numbers" will remain blank.
2. When the Supervisor enable or disable any filter, the total dialable numbers will be displayed. "Test" filter has been enabled to get the total dialable number in the following screenshot.

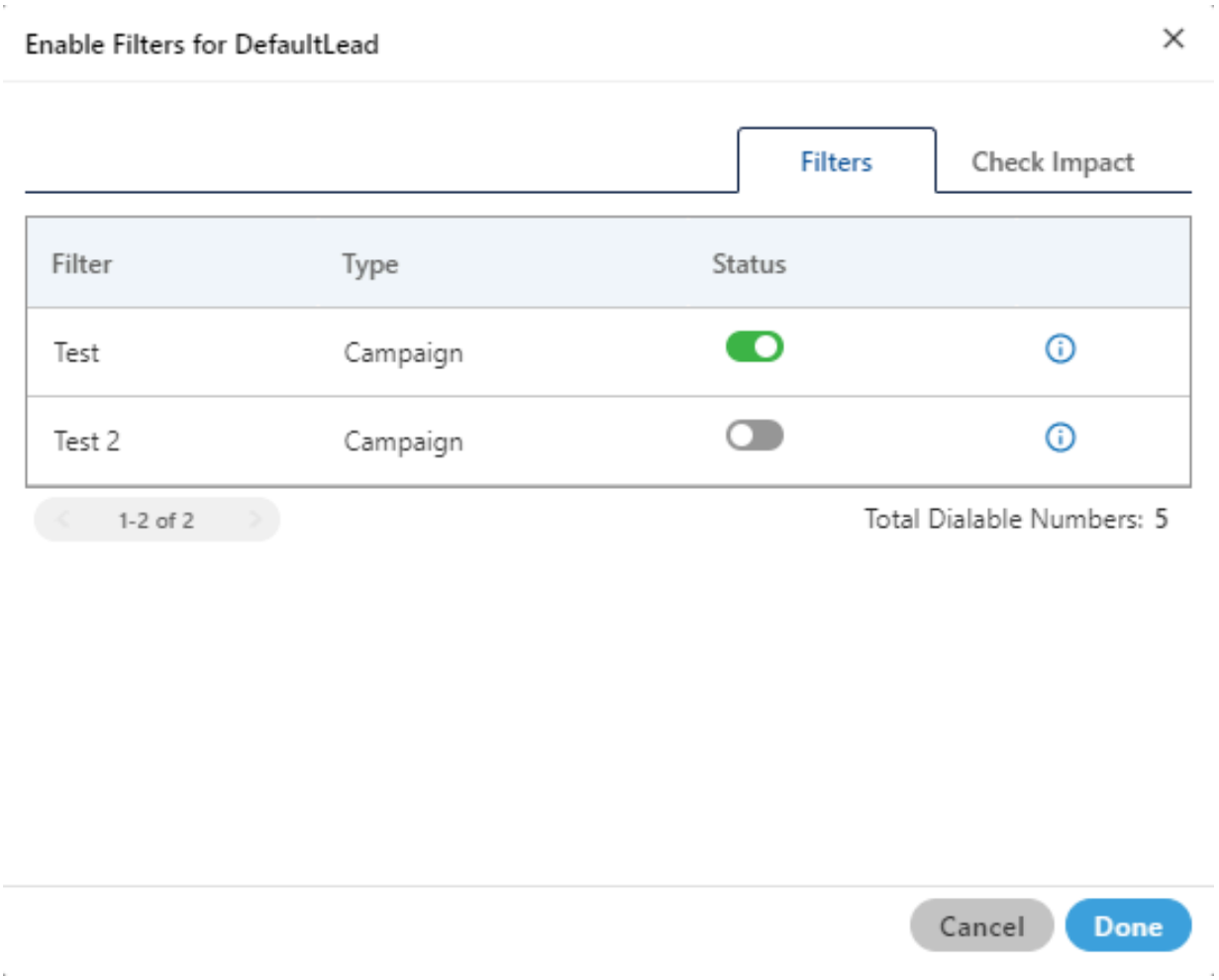


Figure: Total Dialable Numbers after enabling a filter

3. The count of "Total Dialable Numbers" changes whenever the Supervisor enable or disable other filters. For example, the Total Dialable Number in our test case changes when the Supervisor has enabled one more filter.

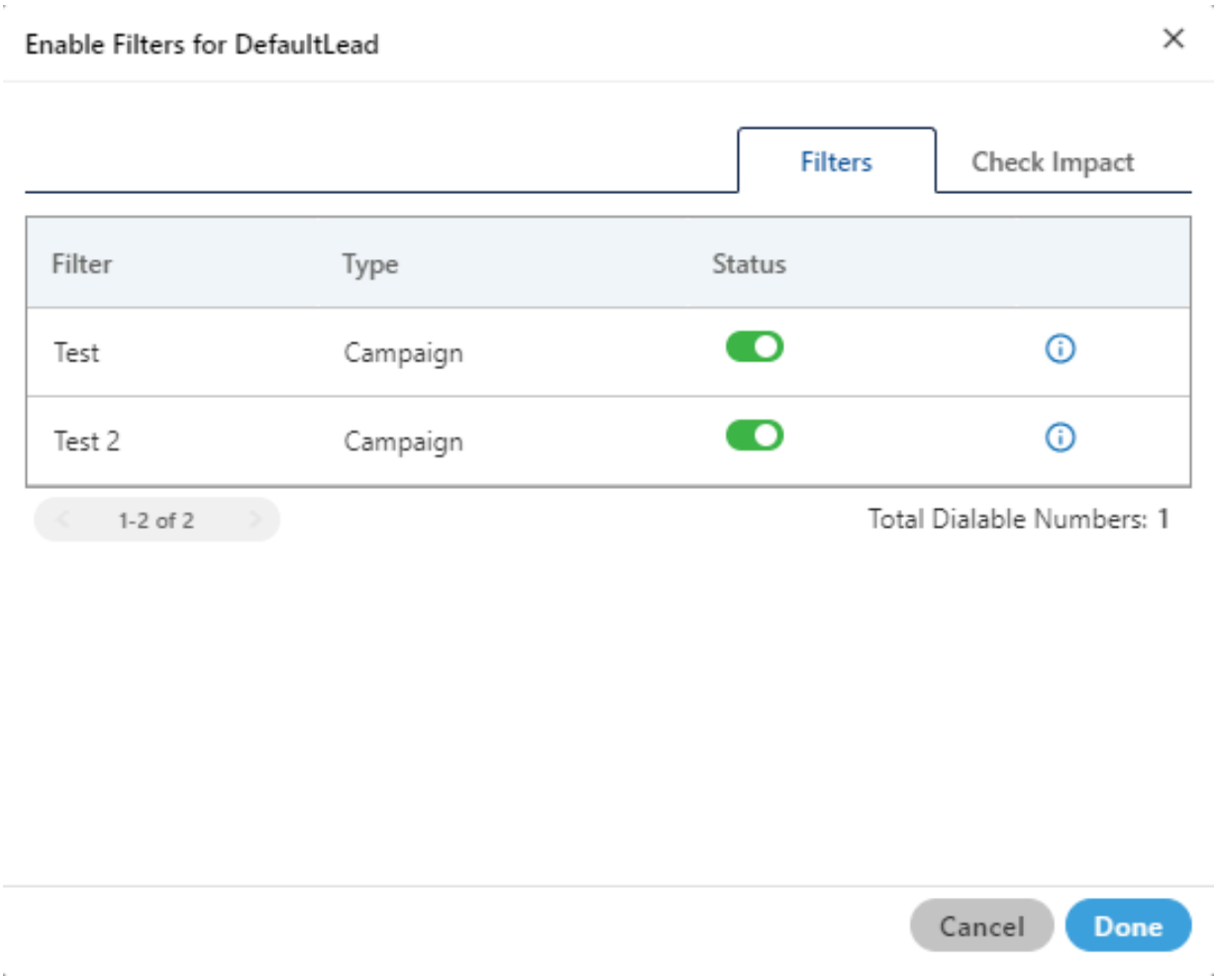


Figure: Total Dialable Numbers after changing status of filters

4. The Supervisor can switch to "Check Impact" tab to view the Dialable Numbers for every filter and total dialable numbers.

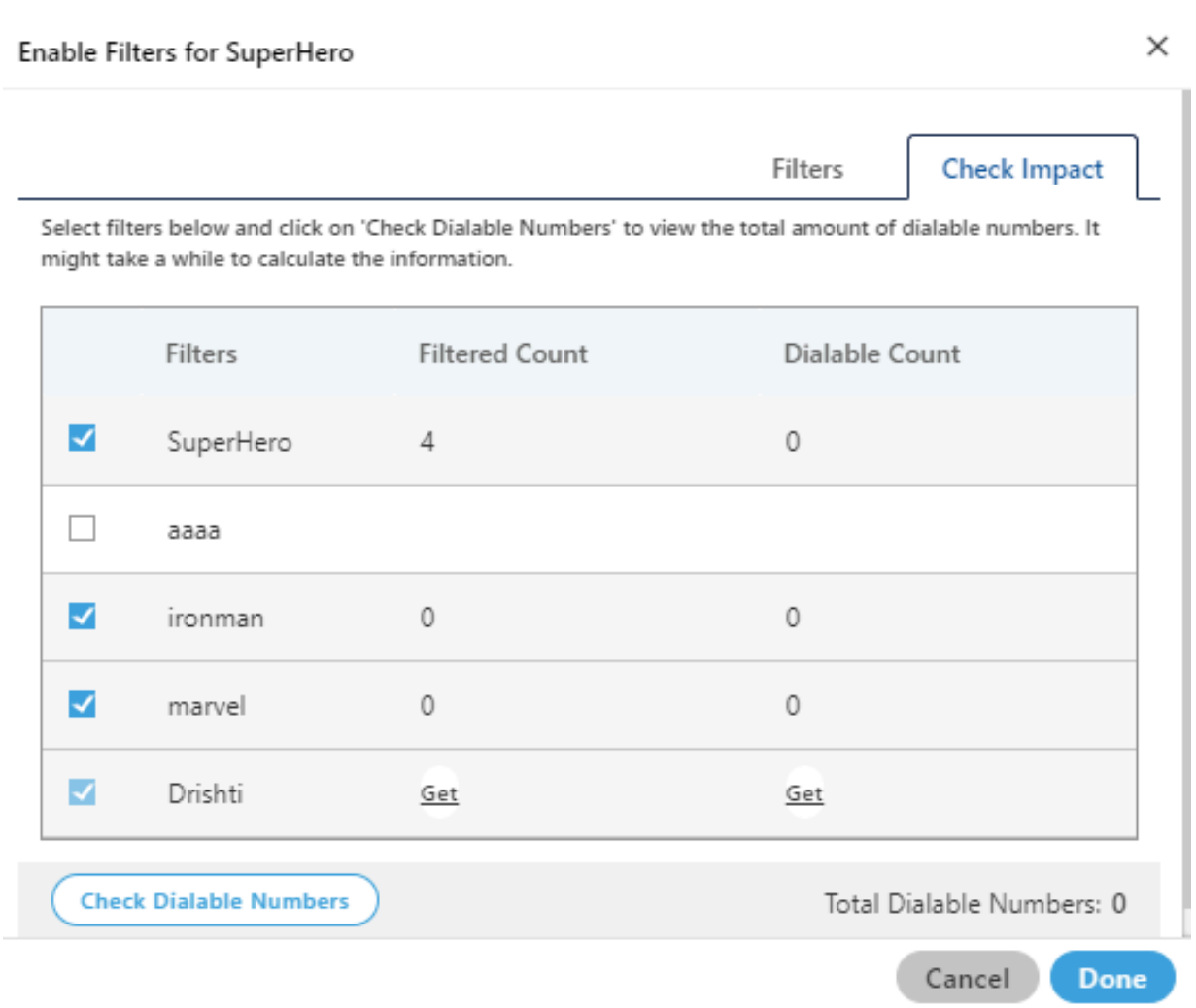


Figure: "Check Impact" tab

5. If a filter has been disabled, then its checkbox will remain blank. If a filter is enabled, then its checkbox will remain selected (but disabled) and a "Get" link will be displayed. For example in the above screenshot, "Test" filter is disabled whereas "Test 2" filter is enabled.
6. The Supervisor can click the checkbox for the disabled filter such as "Test" to view the numbers in "Filtered Count" and "Dialable Count" columns. Also, the Supervisor can click "Get" link to get these counts. It shows the Dialable Count for every filter separately and total count after enabling or disabling the filters.

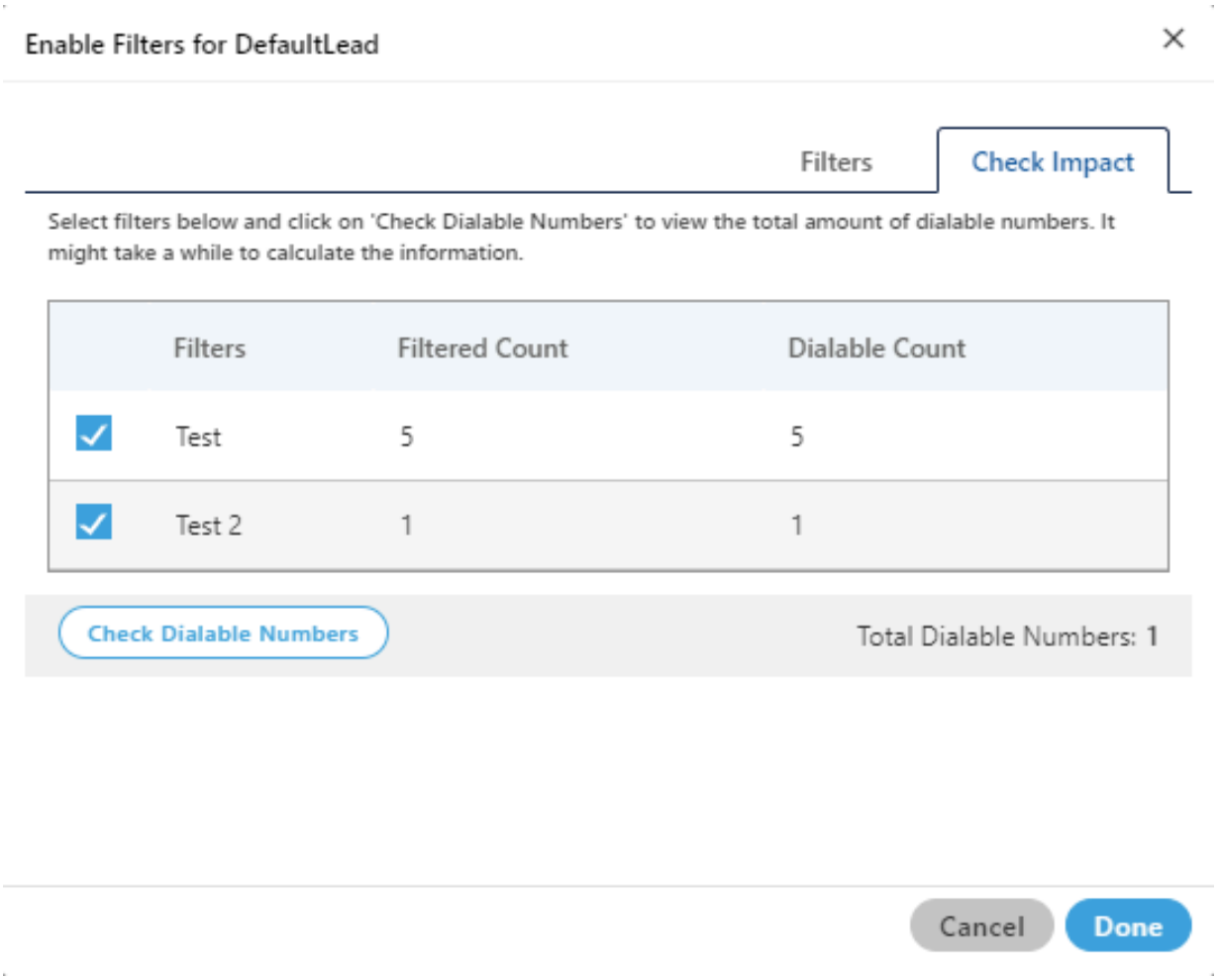


Figure: Dialable Count for every filter separately and for all filters

7. The Supervisor can click"Check Dialable Numbers" to get the Total Dialable Number count after enabling or disabling the filters. Whenever the status of a filter is changed, the Supervisor has to click "Check Dialable Number" button to get the updated dialable number count.
8. Click "Done" to save the changes and close the pop-up. Rater, click "Cancel" to close the pop-up without making the changes.

User Mapping (Licensable)

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.

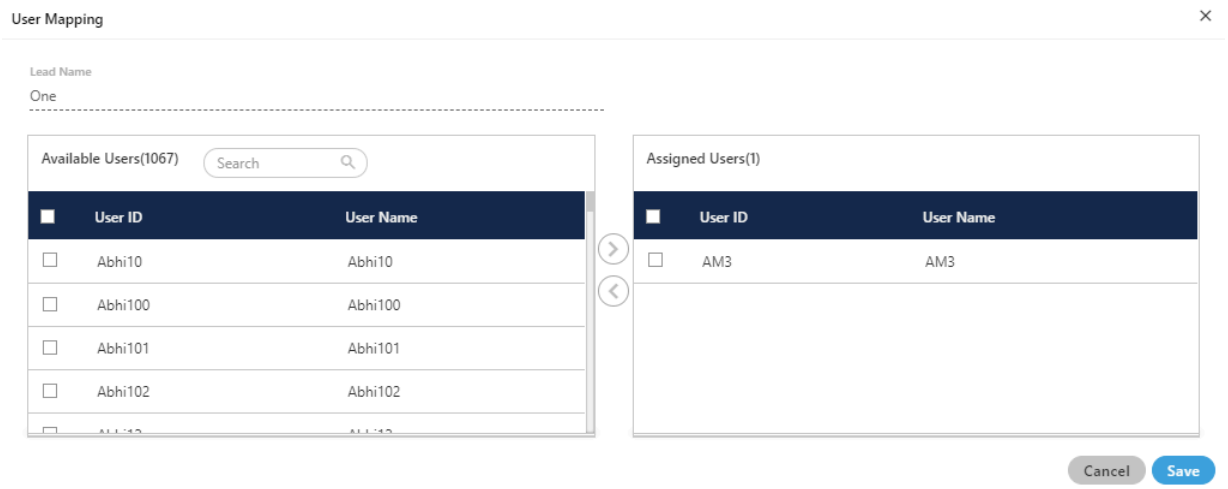


Figure: Map Users with Lead

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.

Time Slots to Enable or Disable the leads

The supervisor can enable or disable the lead for a particular time slot. Click "View Configuration" link present in "Time Window" column for the lead.

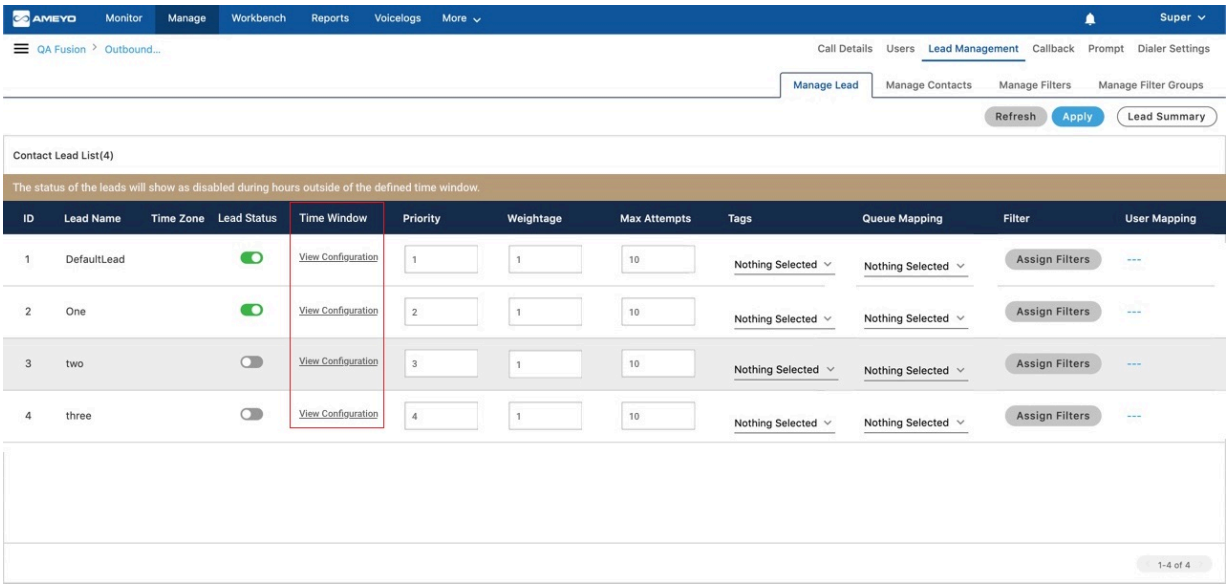


Figure: Time Window Configuration in "Manage Lead" Tab

The Supervisor can click "View Configuration" link for any lead to configure the time slot in which this lead will be enabled. Other than the time slot configured, the lead will remain disabled.

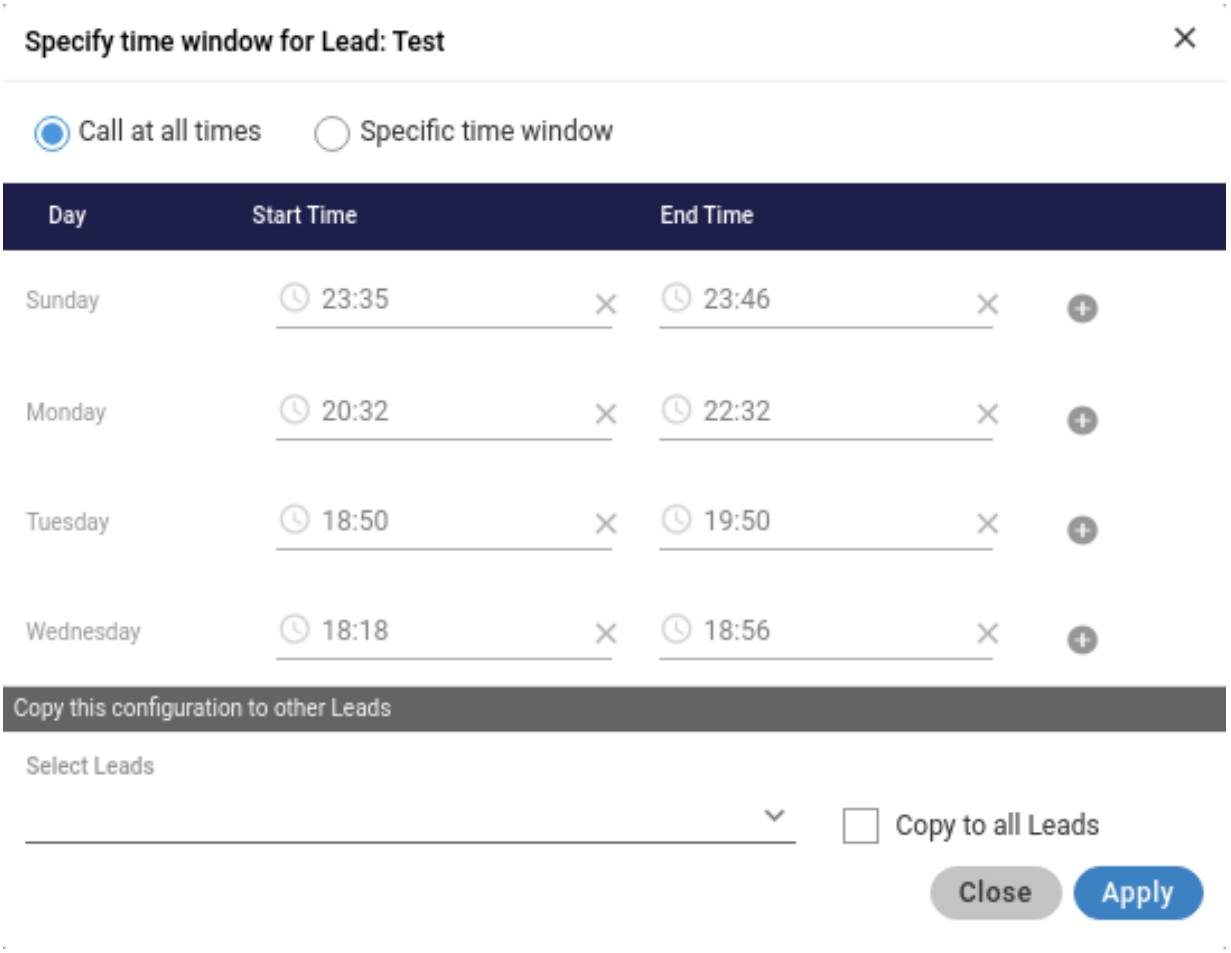


Figure: Modal to specify the time slot for a lead

By default, "Call at all times" option is enabled so that the leads remain enabled to allow continuous calling even after upgrading the package to Ameyo Application Server 4.81 GA. The business' Supervisor has to configure the time slots as per requirement.

The Supervisor can click "Specific time window" option to define the time slots in the days.

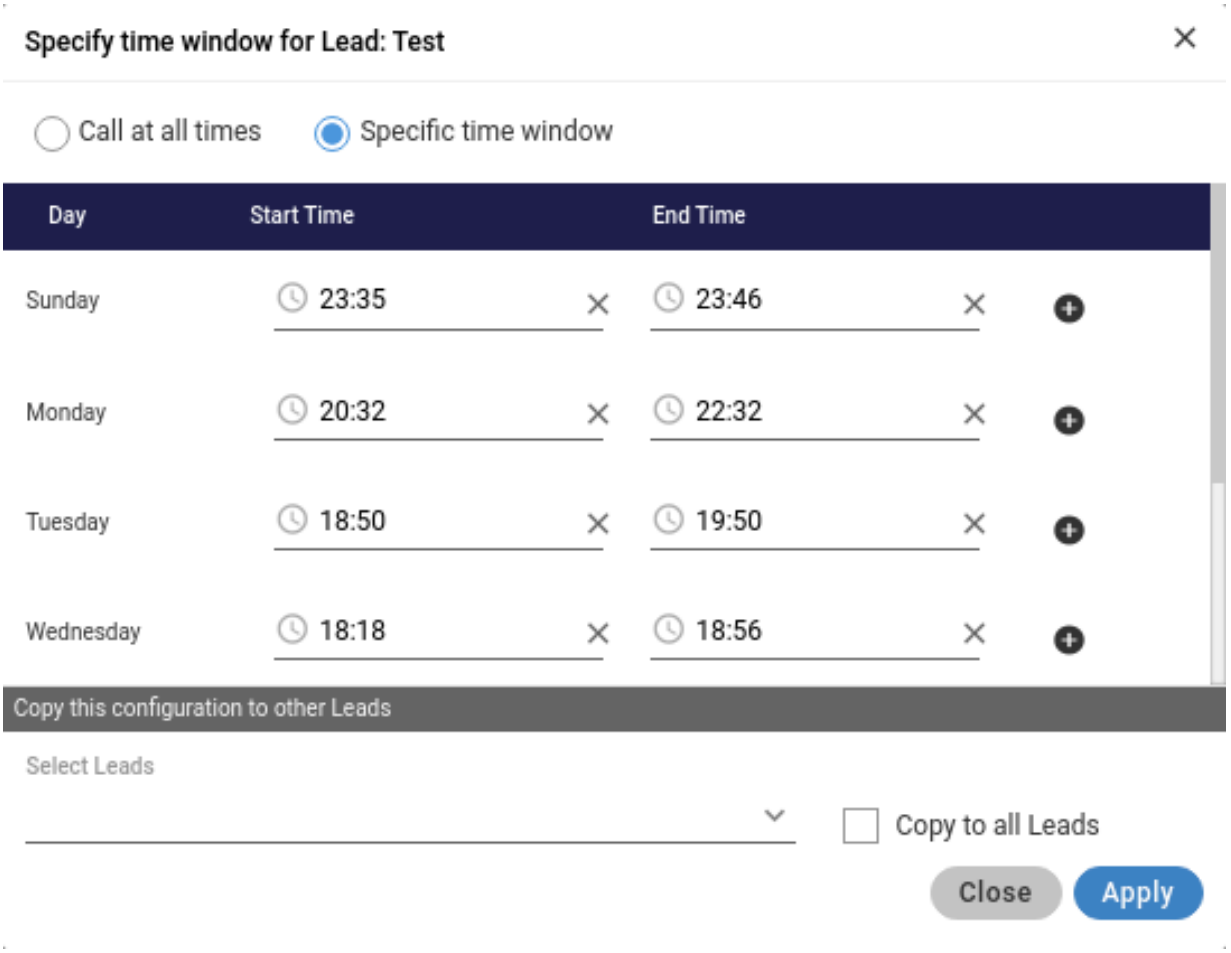


Figure: Select time period for the lead

For a day, the Supervisor has to provide the values for "Start Time" and "End Time". The Supervisor can click "+" icon to add another time period for the same day.

Similarly, the Supervisor can configure the time slots daily.

If the Supervisor wants to apply the same time slots for all leads, then the Supervisor can click "Copy to all Leads" option. Once enabled, the Supervisor can select the leads in "Select Leads" drop-down menu for enabling the same settings in other leads as well.

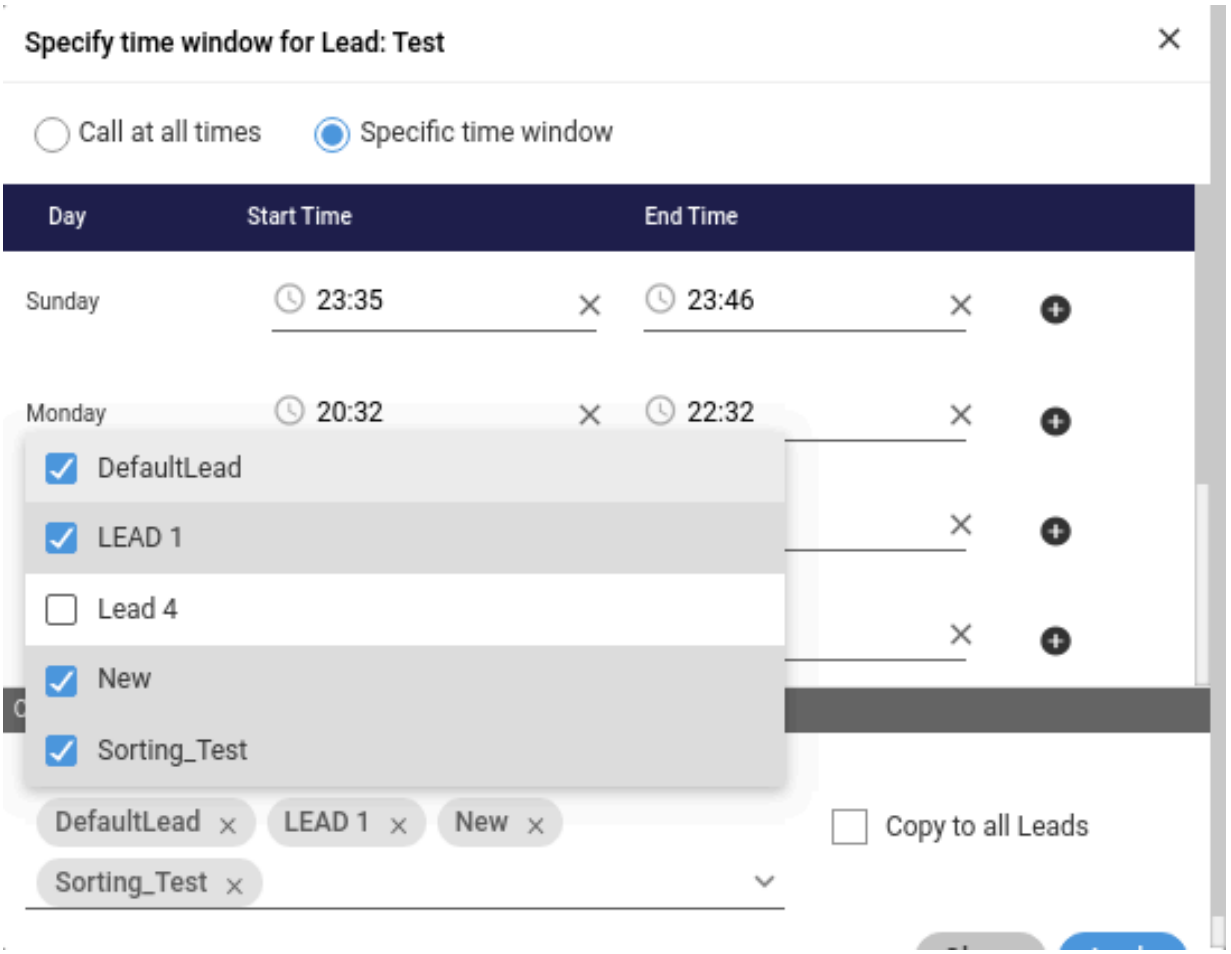


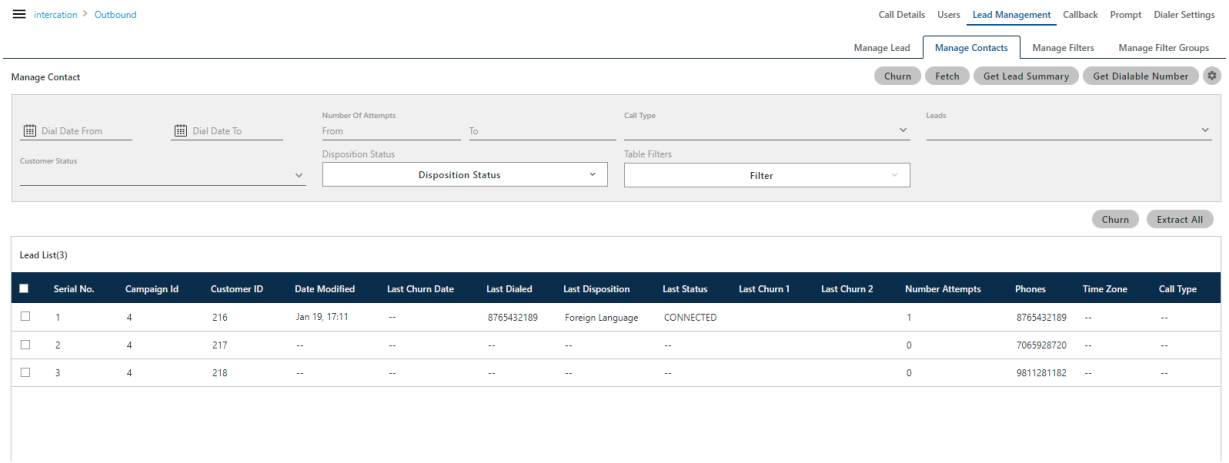
Figure: "Copy to all leads" option

Other Important Points

- "Get Dialable Number" under "Manage" tab will depend on the time-slot configuration.
- The time slot configured for a specific day should not be overlapped.

19.2.5.2.2. "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.



Here, Supervisor can perform the following operations.

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.

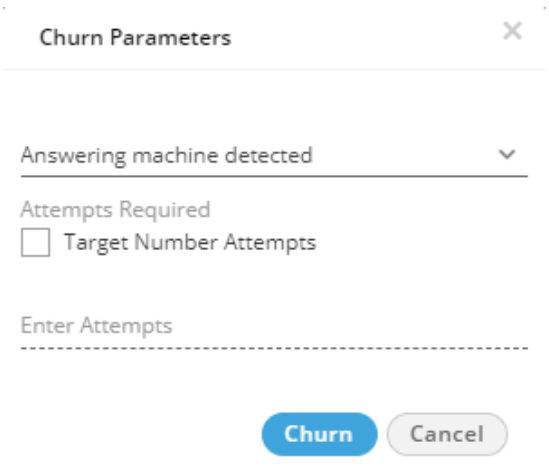


Figure: Churn Leads

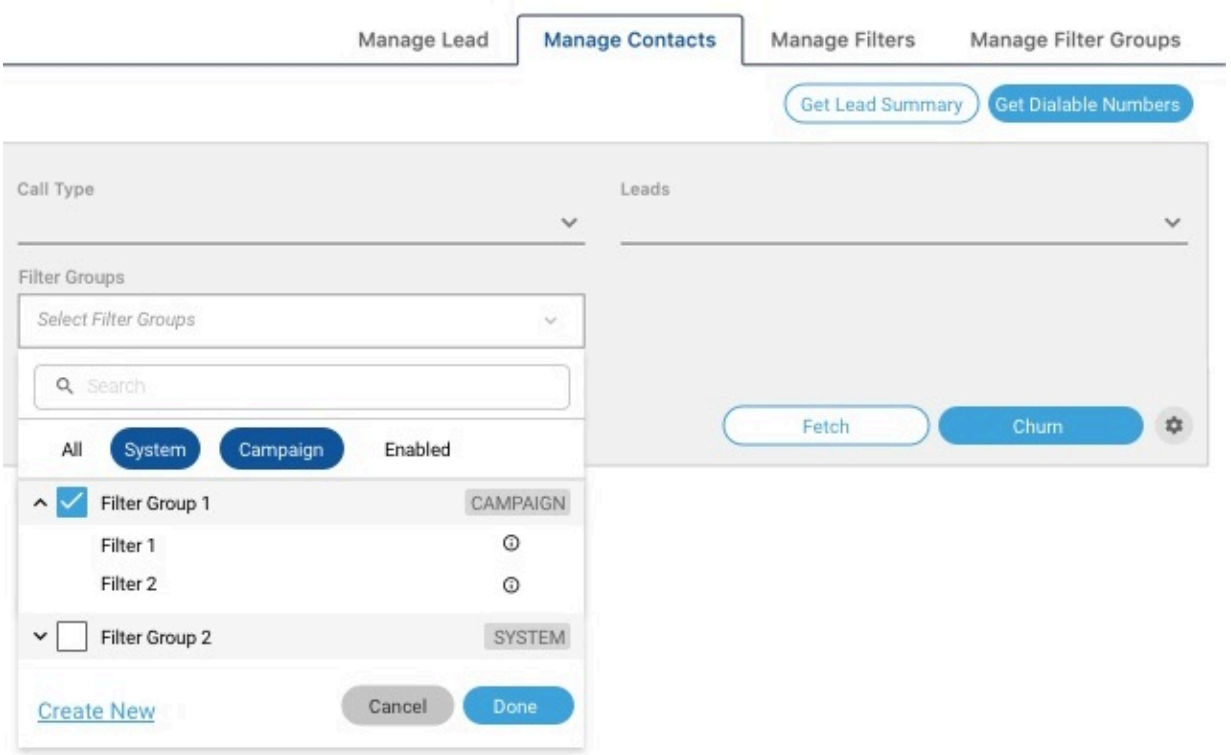
2. Now, select the target customer status (status of records which needs to be churned) from the following drop down list.
    - **Answering Machine Detected** :When a number is detected by the Answering Machine, and then it gets disconnect.
    - **Attempt to make a call failed: :**When the attempt failed due to any of the reason, and it disconnects.
    - **Call attempt was unsuccessful:**Those numbers which do not dial from the Ameyo or the attempt did not perform.
    - **Call was dropped:**When the call disconnects in between before the customer could answer to it.
    - **Customer hangup:**When the customer disconnects the call without answering it
    - **Customer not tried till now:**Those numbers which have not been tried or they still left for the call attempt.
    - **Customer was connected to an Agent:**Those numbers which successfully connected with the numbers.
    - **No answer from Customer:**When the customer connects on the call with the Agent, but there is no reply received from the Customer.
    - **Number temporary failure:**If the number is out of reach or there is a temporary down status for the number by the network provider.
    - **Provider failure:**If the number does not connect due to provider failure.
    - **Provider temporary failure:**: If the number does not connect due to the Provider failure but this issue remains for some time or temporary.
    - **SIT intercept:** If the number disconnected or the number of the customer has been changed.
    - **SIT reorder:**If the number dialed has fewer digits than usual or it has incomplete digits.
    - **SIT No-Circuit:**If all the circuits of the network are busy
    - **SIT Vacant:**If the number does not assigned to any of the queue.
    - **User busy:**If all users are busy to take the call of the customer and the customer disconnects the call.
    - **Wrong number:**If the dialed number is wrong.

3. Specify the number of target attempts. It is the number to which the total tried count rests. For example, if a number is tried 10 times, and the target attempt provided is 4, then after churning the tried count of that number will be marked as 4.
4. Click "**Churn**" to churn the numbers.

Churning of Lead Lists based upon the Filter Groups

The Supervisor can click "Group Filters" drop-down menu to use the filter groups in churning.

For example, There are scenarios where the supervisor needs to churn the leads based on the Filter Groups. For example, there is a collection process and the lead has been uploaded with details like customer's phone number, location and amount. If it is found that the connectivity with the customers in location A is more efficacious, then the supervisor can churn the leads for that particular location. Similarly, if it is noticed that the connectivity to the phone numbers starting with '98' is more effective, then a Filter Group for the same can be added and the supervisor can churn the lead based on the phone number.



The Supervisor can click "Create New" link to create a new filter group.

The Supervisor can click "System" tab in this modal to display the system-level filters.

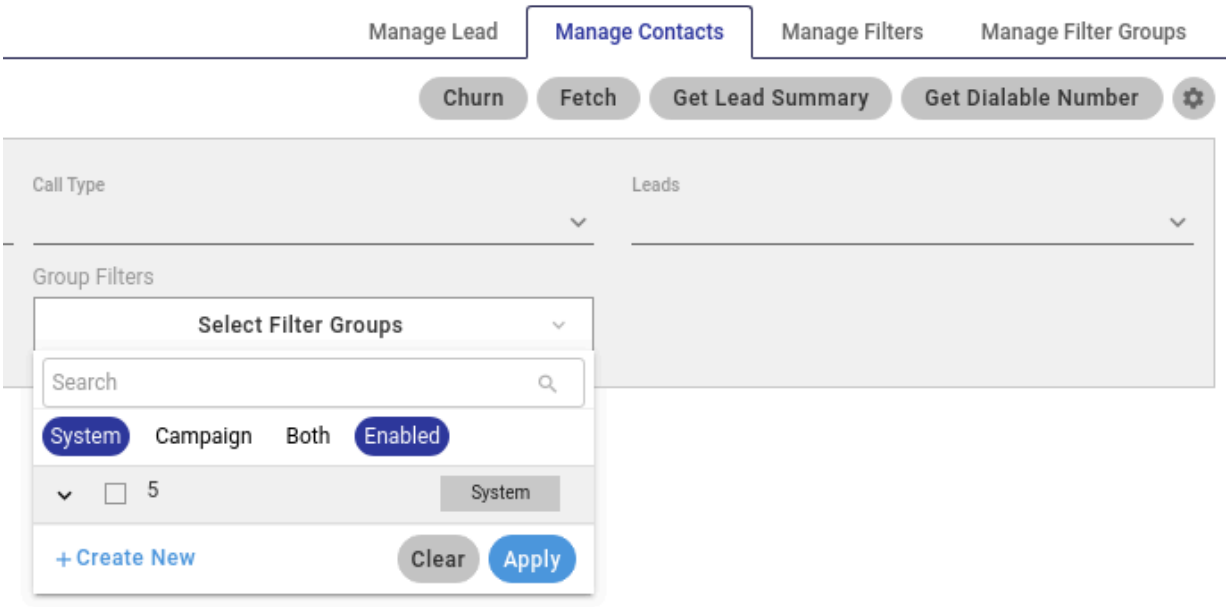


Figure: System Filter Groups

The Supervisor can click "Campaign" to display the campaign-level filters. If "Enabled" is also clicked, then the enabled filer groups will be displayed.

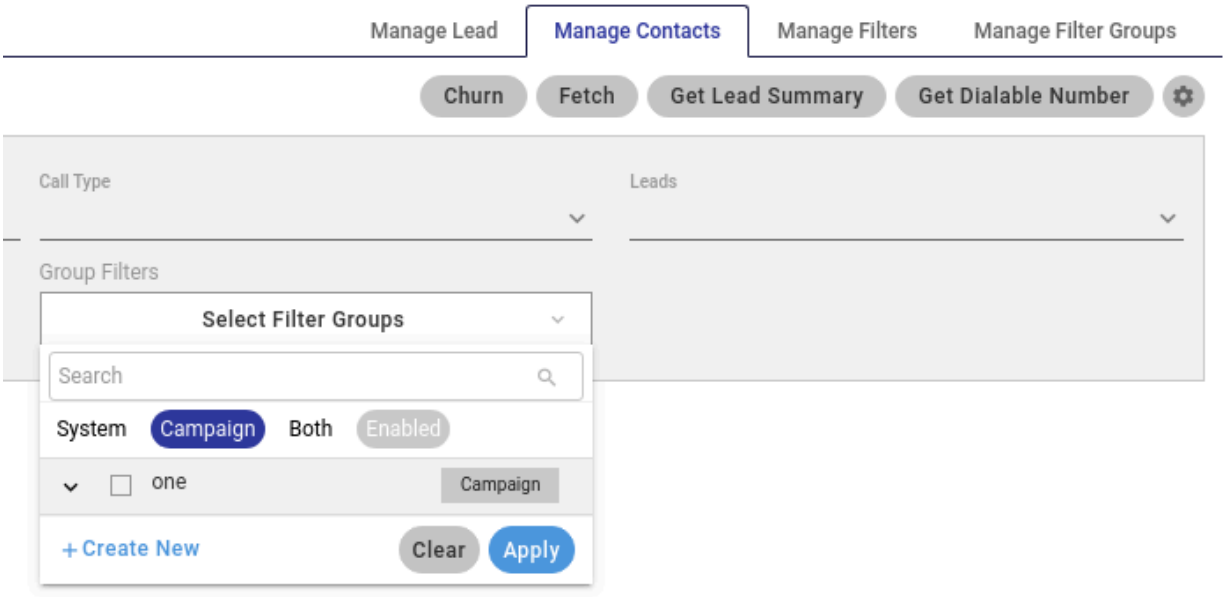


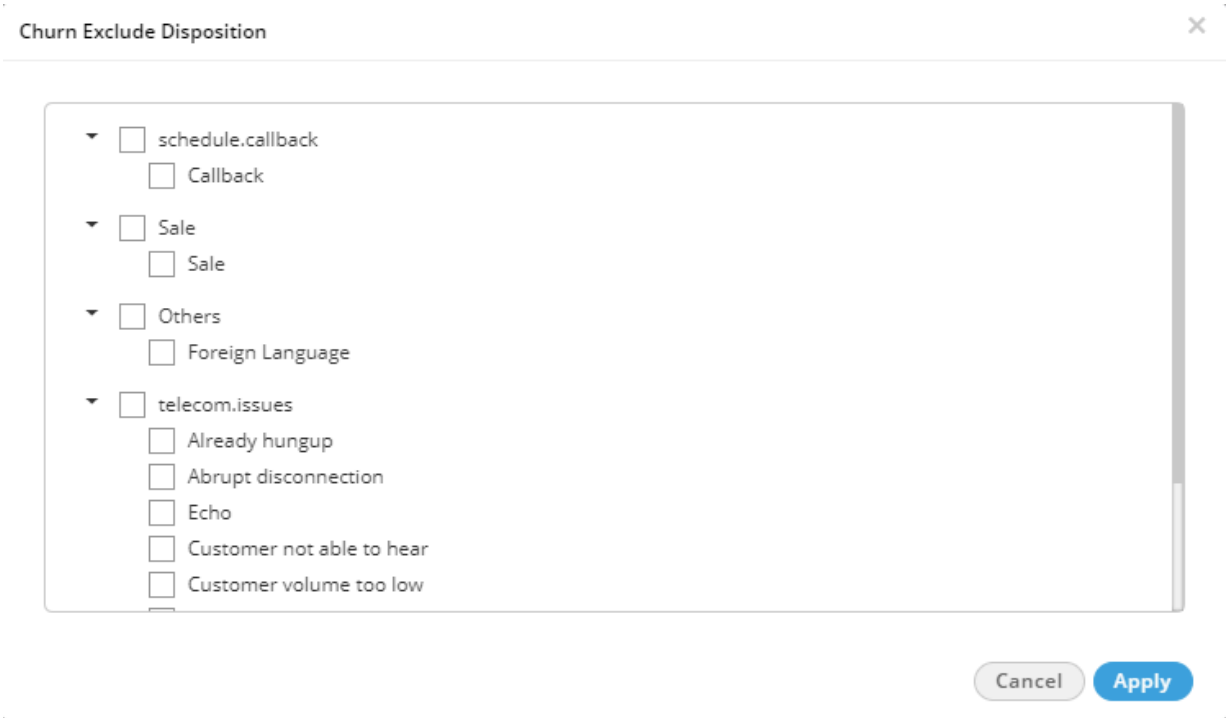
Figure: Campaign Filter Groups

The Supervisor can click "Both" to view both System-level and Campaign-level Filter Groups.

The supervisor is able to fetch, churn, or extract the contacts from the Lead Management tab. But earlier, while fetching the contacts according to the provided criteria only 1000 contacts were fetched at a time irrespective of the total count that matches the criteria. Due to this, the supervisor had to extract the contacts again and again. Thus, there it was required to select all the contacts matching the criteria.
Now, the supervisor can select all contacts that matches the criteria. It will help the supervisor to select all contacts and extract, or churn them with one click that matches the criteria. The supervisor can click "Extract All" button to extract all contacts that matches the criteria; "Churn All" button to churn the contacts; and "Delete All" button to delete all contacts that matches the criteia. It will perform the action on all matching contacts present on UI or on server irrespective of the count of 1000.

Churn Exclude Dispositions

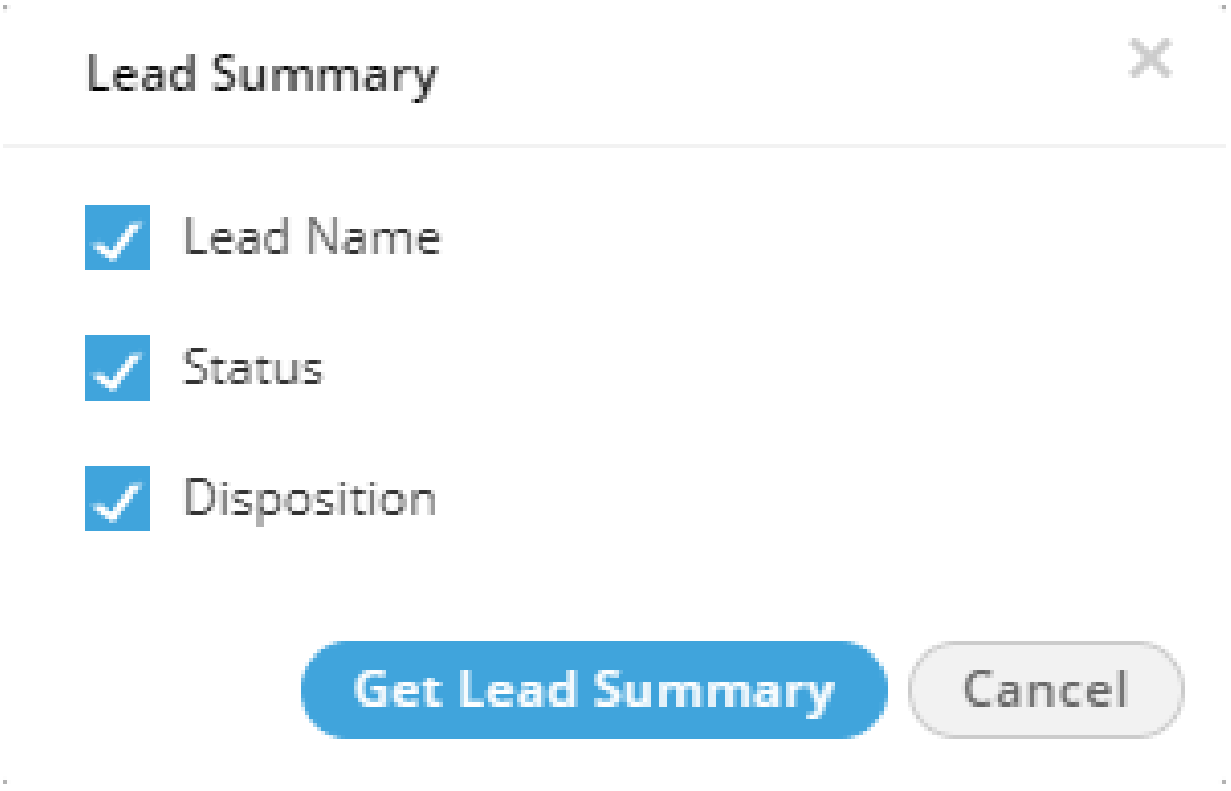
Supervisor can click  icon on the top right corner to exclude the dispositions from the churning. It shows the following pop-up.



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.

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.



Here, the Supervisor can uncheck the checkbox provided against the headers which are not required or which the supervisor does not wants 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.

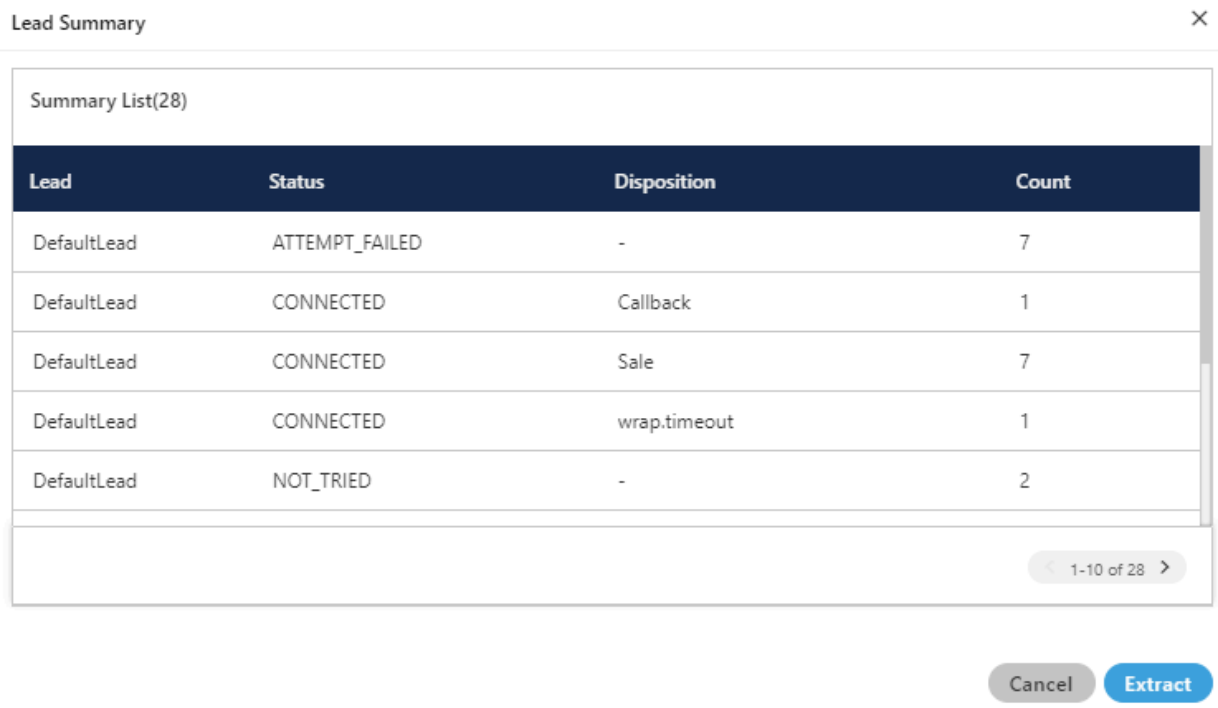


Figure: Summary of Leads

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

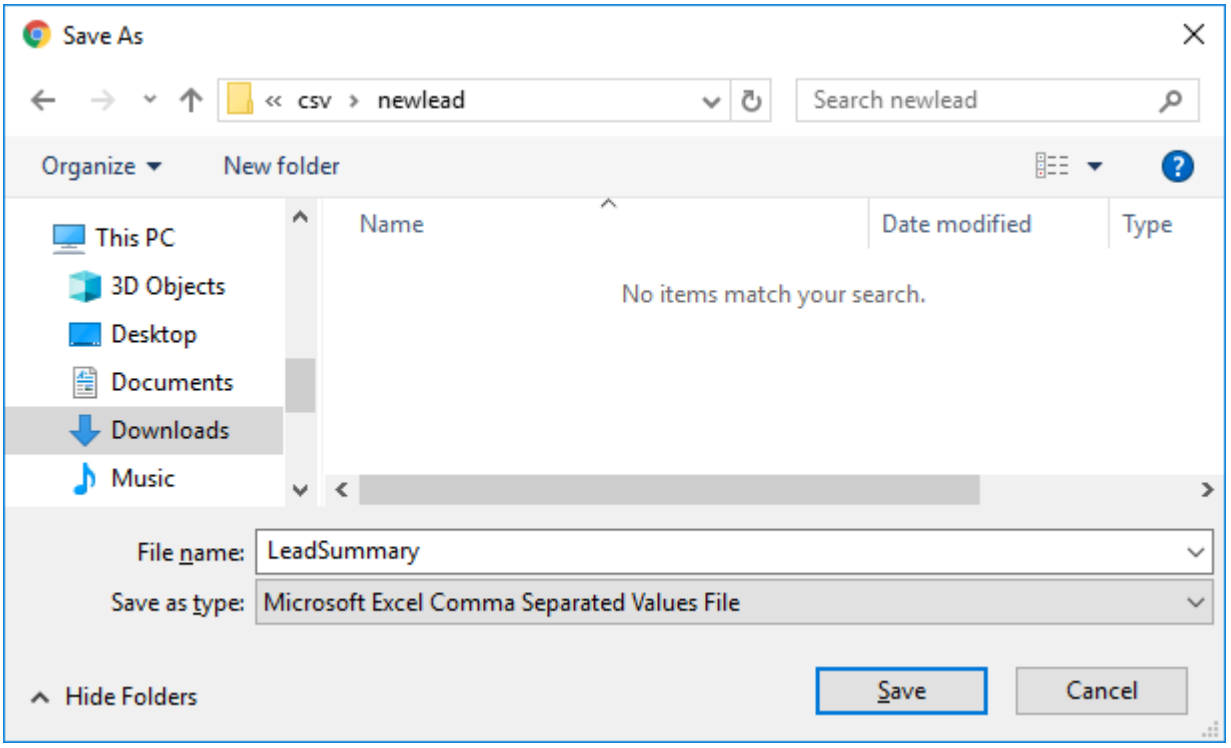


Figure: Lead Extraction

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

Get Dialable Numbers

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

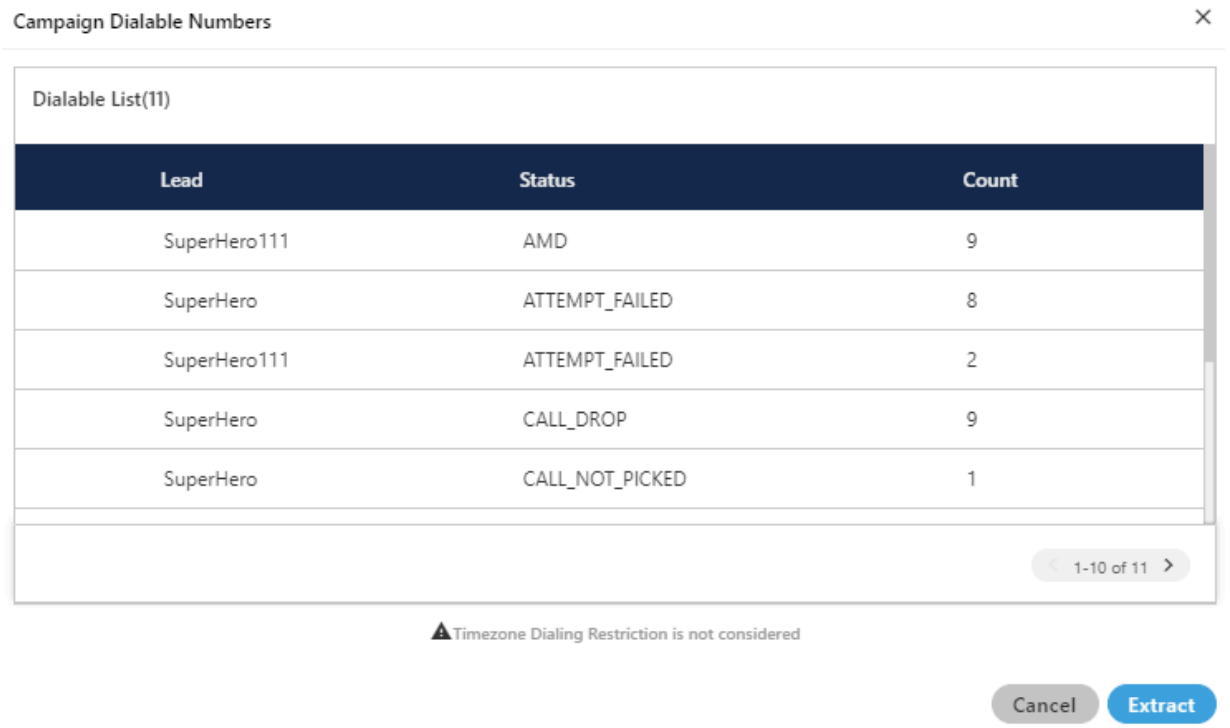
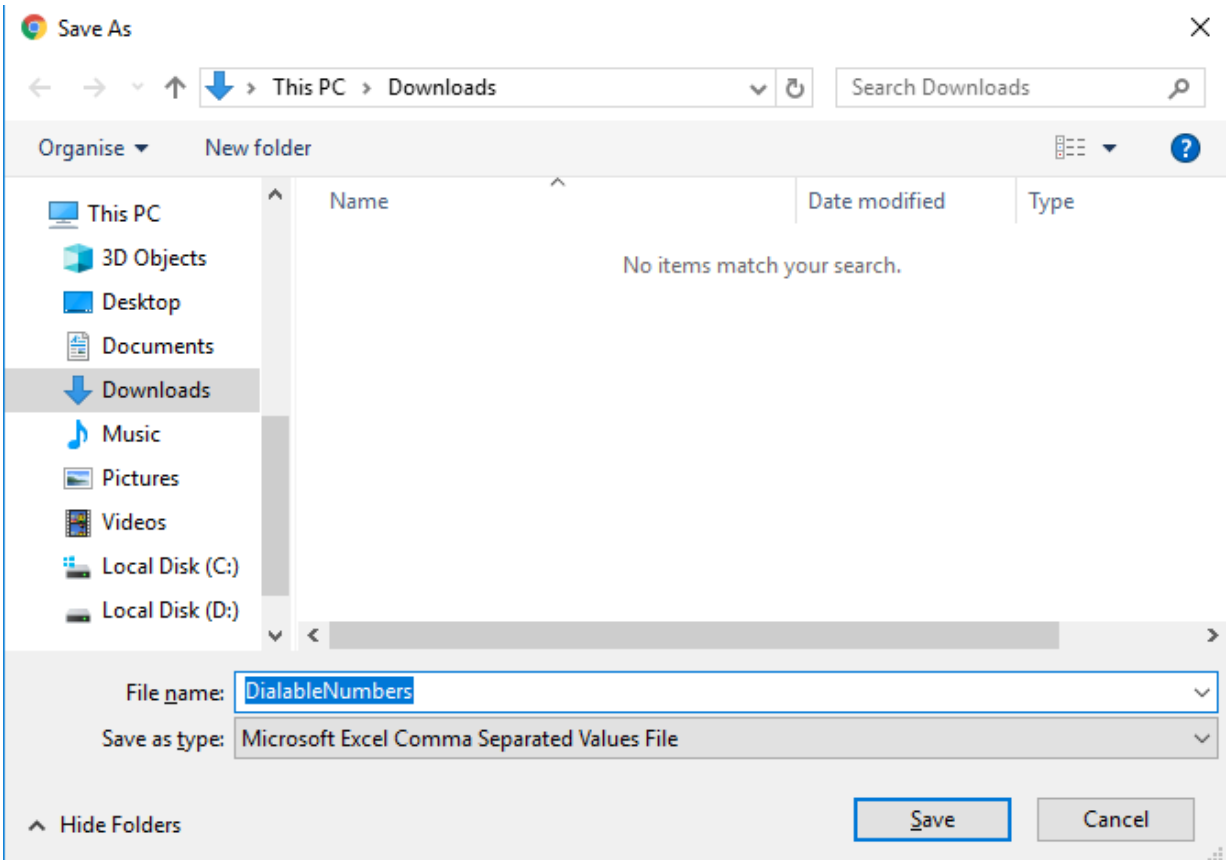


Figure: List of Dialable Numbers

On clicking the button, it shows the status of all the numbers, which are dialed from the lead. Select the lead first and then press the button to fetch the complete status of the lead.

You can click "Extract" to save the list of dialable numbers as CSV file on the disk. On clicking the "Extract button", it shows the following pop-up to confirm the download of the file.



Click "Save" button to download the file. It saves the file with its default name, you can change the file name from here.

The above download option of the file is based upon the downloading settings of the browser. The user can change the settings of the browser from the browser's setting tab at any time.

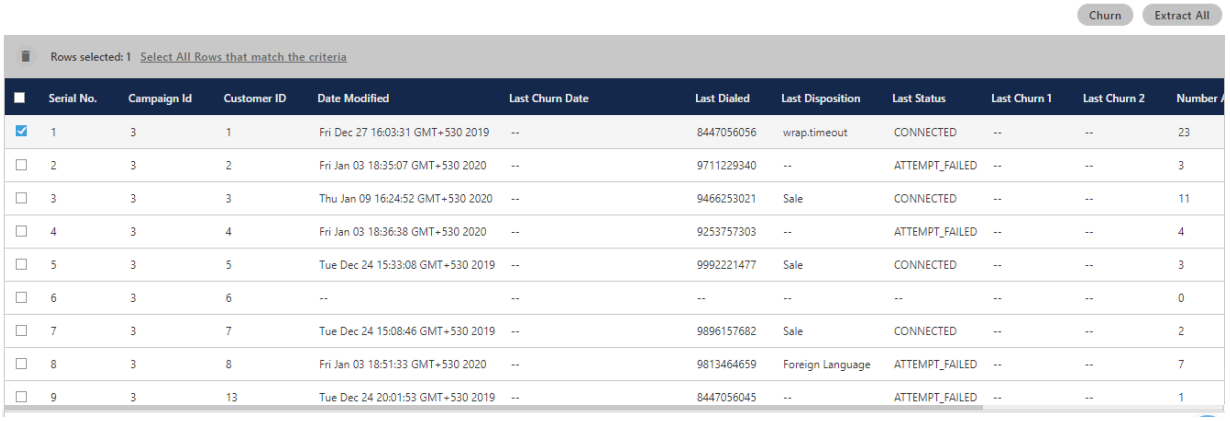
View and Filter Lead List

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 status of the call for the customer.
- **Disposition Status:** Select the type of the disposition for which you want to filter the lead.
- **Table Filters:** Select the table filters. It contains all the filters which are configured. However, the supervisor can create a new table filter as well. Know more...

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



Serial No.	Campaign Id	Customer ID	Date Modified	Last Churn Date	Last Dialed	Last Disposition	Last Status	Last Churn 1	Last Churn 2	Number A
1	3	1	Fri Dec 27 16:03:31 GMT+530 2019	--	8447056056	wrap.timeout	CONNECTED	--	--	23
2	3	2	Fri Jan 03 18:35:07 GMT+530 2020	--	9711229340	--	ATTEMPT_FAILED	--	--	3
3	3	3	Thu Jan 09 16:24:52 GMT+530 2020	--	9466253021	Sale	CONNECTED	--	--	11
4	3	4	Fri Jan 03 18:36:38 GMT+530 2020	--	9253757303	--	ATTEMPT_FAILED	--	--	4
5	3	5	Tue Dec 24 15:33:08 GMT+530 2019	--	9992221477	Sale	CONNECTED	--	--	3
6	3	6	--	--	--	--	--	--	--	0
7	3	7	Tue Dec 24 15:08:46 GMT+530 2019	--	9896157682	Sale	CONNECTED	--	--	2
8	3	8	Fri Jan 03 18:51:33 GMT+530 2020	--	9813464659	Foreign Language	ATTEMPT_FAILED	--	--	7
9	3	13	Tue Dec 24 20:01:53 GMT+530 2019	--	8447056045	--	ATTEMPT_FAILED	--	--	1

Once the lead is fetched, then the supervisor either can Churn or Extract All the numbers of lead in a CSV file on the system.

The fetched list of contacts contains the following columns

1. **Serial No.:** It shows the serial number of the fetched contacts.
2. **Campaign Id:** It shows the id of the campaign from which the number has been tried for the call.
3. **Customer ID:** It shows the Id of the customer from the lead.
4. **Date Modified:** It shows the date and time of the last modification the call which has been applied.

5. **Last Churn Date:** It shows the last churn date and time of the contact, if the contact is churned before.
6. **Last Dialed:** It shows the number of the customer which is dialed last time. It is used in cases when the alternative number of the customer is dialed, in that case, it shows that alternative number for that customer.
7. **Last Disposition:** It shows the disposition used through which the call has been disposed last time.
8. **Last Status:** It shows the status of the call which is collected at the last time.
9. **Last Churn 1:** If the number has already been churned before, then it shows the status used to churn that number.
10. **Last Churn 2:** If the number has already been churned two or more than two times before, then it shows the last status used to churn that number.
11. **Number Attempts:** It shows the total number of attempts which is tried to connect with the customer over call.
12. **Phones:** It shows the number of the customer, which is used and stored in the lead.
13. **Time Zone:** It shows the time zone of the customer, if it is selected to call.
14. **Call Type:** It shows the type of the call which is used to dial the number of the customer.

Delete Customers: You can delete the customers from here as well. Select the customer and then click the delete icon to remove the customers.

19.2.5.2.3. "Manage Filter" Tab in Lead Management

19.2.5.2.4. Manage Filter Groups (Licensable)

19.2.5.2.5. Dialer Settings

19.2.6. Workbench

19.2.7. Supervisor Account Menu

19.2.8. Logging Out

19.3. Agent Guide

19.3.1. Agent Account Menu

19.3.2. Set Agent Availability

19.3.3. Agent Console

19.3.4. Login at Ameyo

> **Network recovery** – If your administrator has enabled the contact center preference `isAutoReloginEnabled`, the web client may **automatically re-authenticate** (without typing user ID and password again on the login page) after a sustained outage, once connectivity to the **same site URL** returns. For full behavior, limits, and configuration scope, see **Auto relogin**.

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

Perform the following steps.

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

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

Replace the following variables.

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

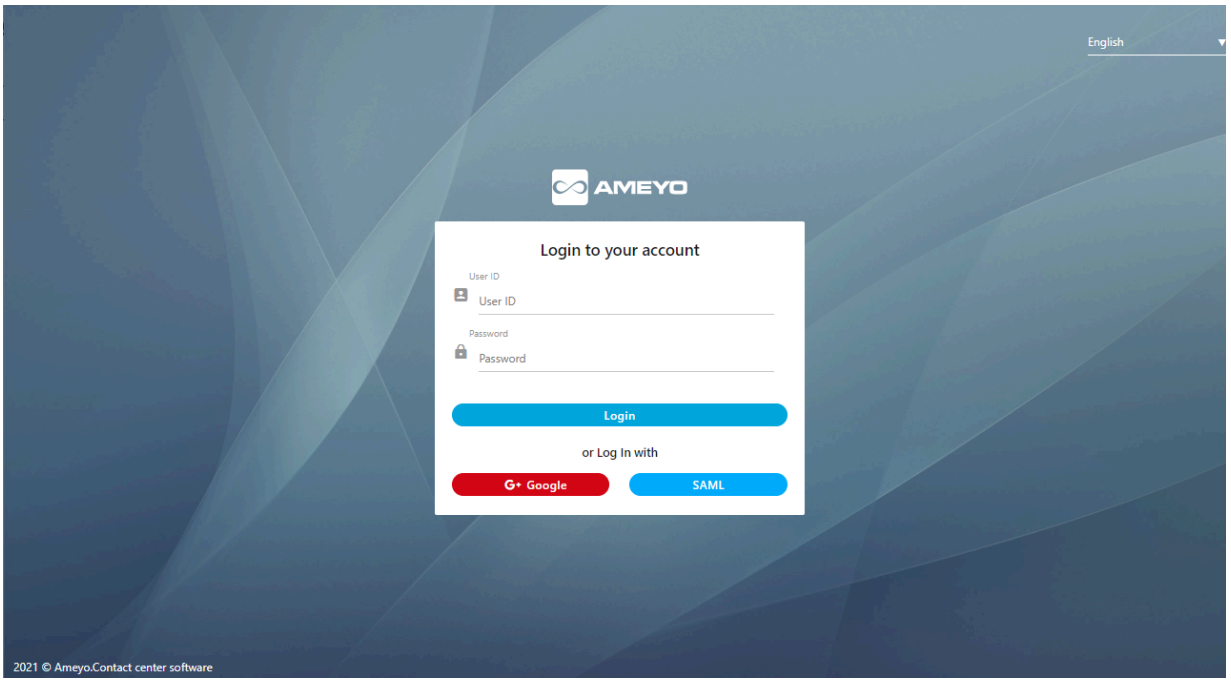


Figure: Login Screen

2. Use any of the following methods to login.

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

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

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

> SAML authentication is supported on Ameyo public cloud with a limitation of 800-900 consecutive logins at a time. OAuth authentication on cloud can be used for 10,000 consecutive logins at a time.

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

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

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

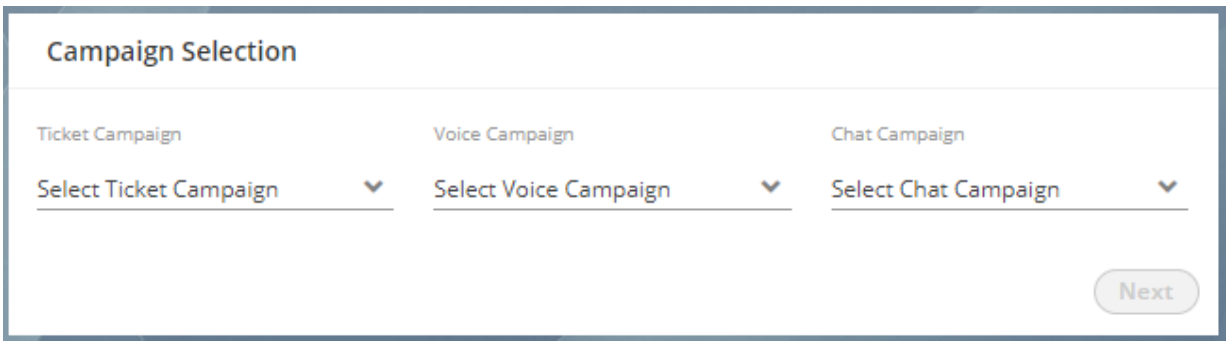


Figure: Select the Campaign

4. Here, the agent has to select any of the following campaign types in which it wants to login. The list will contain only those campaigns in which the agent has been assigned by the Administrator.
    - Ticket (Interaction) Campaign
    - Voice Campaign
        - Inbound Voice Campaign
        - Outbound Voice Campaign
        - Parallel Predictve Voice Campaign
    - Chat Campaign

> The Agent can login to multiple voice campaigns, but the agent can select only one interaction campaign and one chat campaign. The agent can not select multiple interaction campaigns and chat campaigns at a time.

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

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

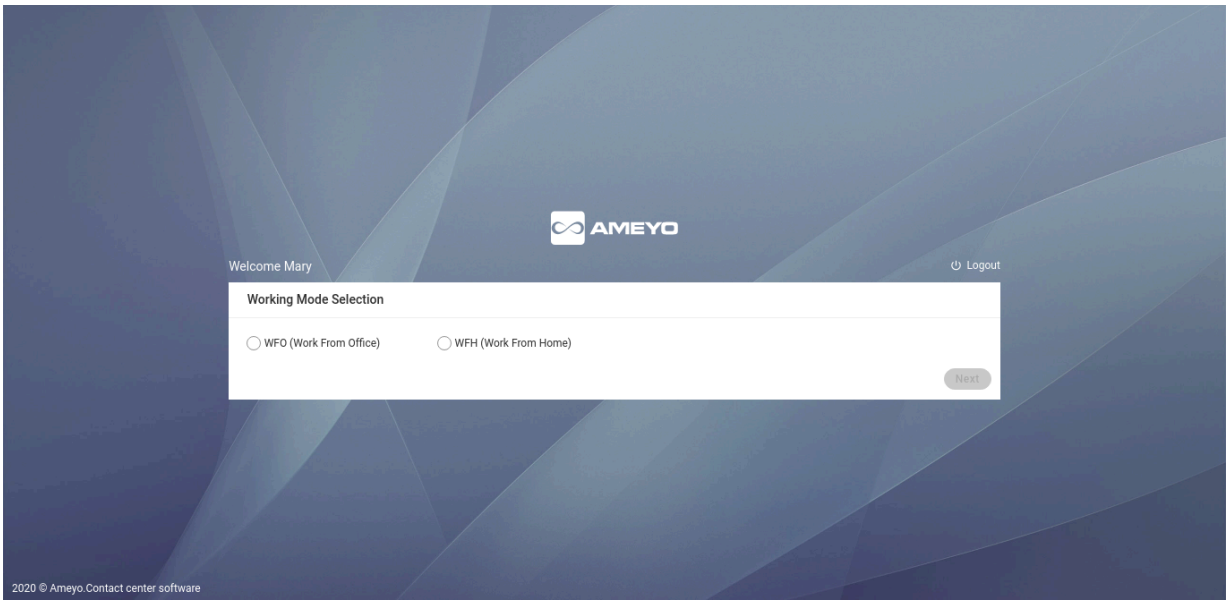


Figure: Select Working Mode Status

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

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

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

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

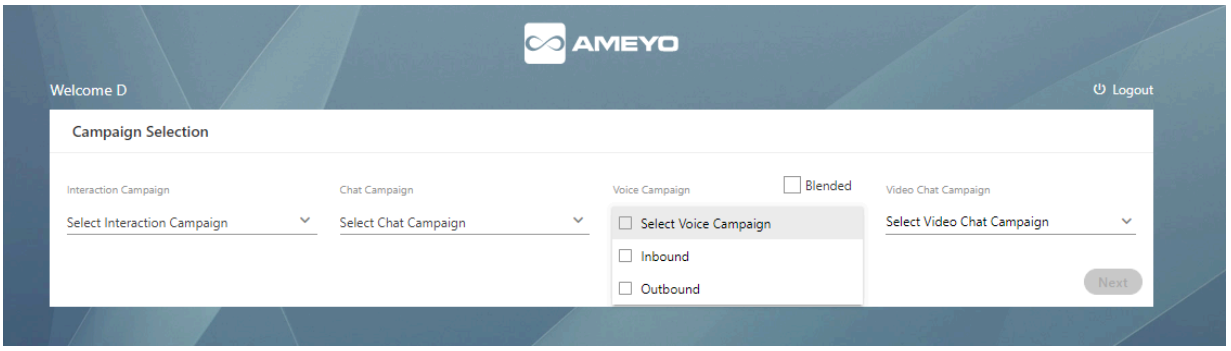


Figure: Voice Campaign Selection

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

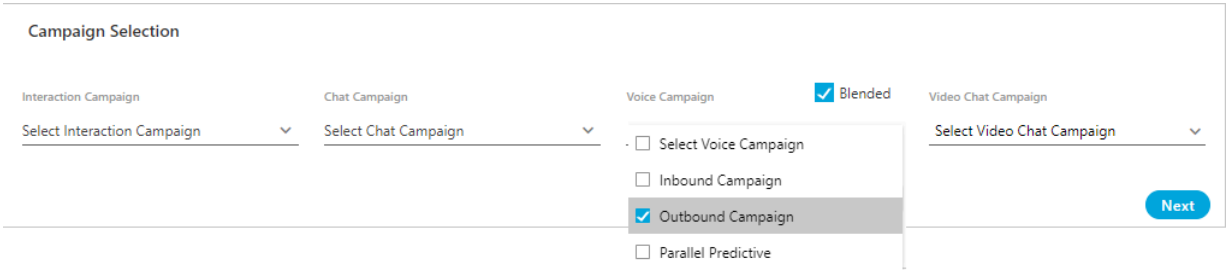


Figure: Selecting Blended Campaigns

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

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

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

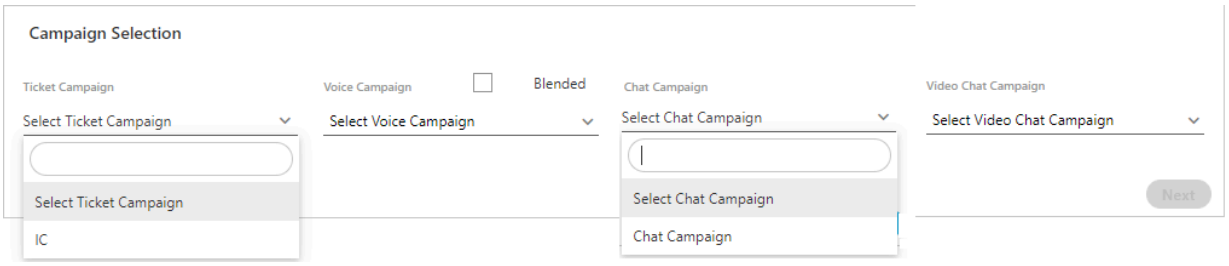


Figure: Select Interaction Campaigns

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

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

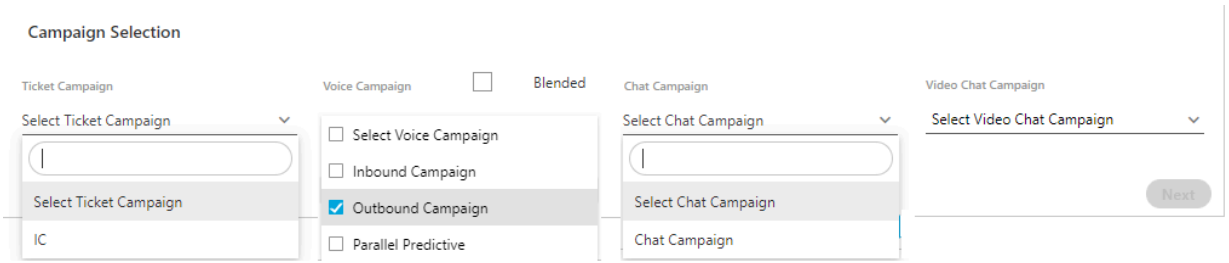


Figure: Voice and Interaction Campaign Selection

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

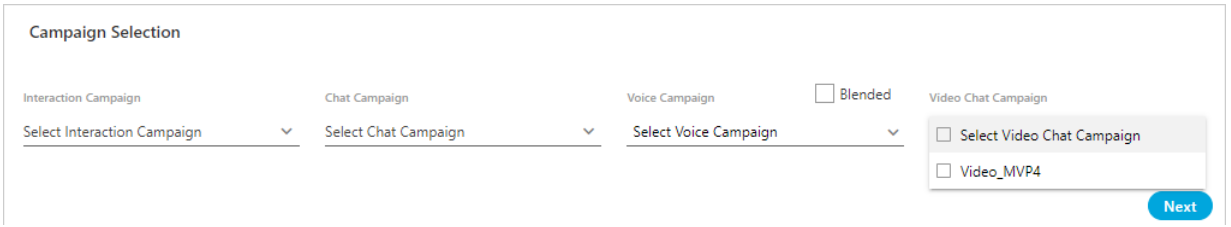


Figure: Video Chat Campaign Selection

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

7. Click "Next" to proceed.

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

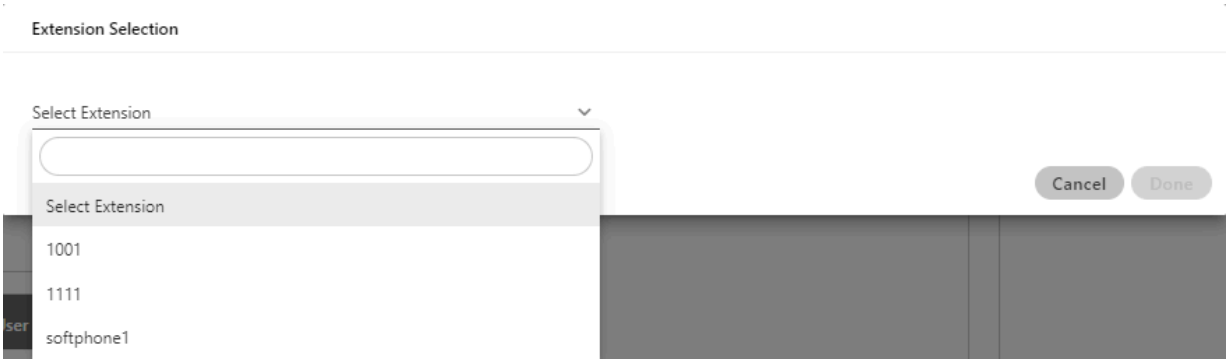


Figure: Extension Selection

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

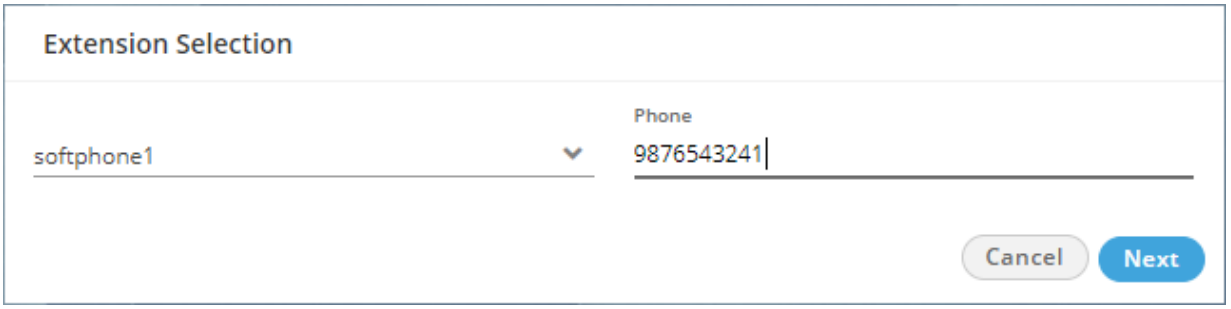


Figure: Entering Number after selecting Extension

Click "Next" to proceed.

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

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

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

"green".

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

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

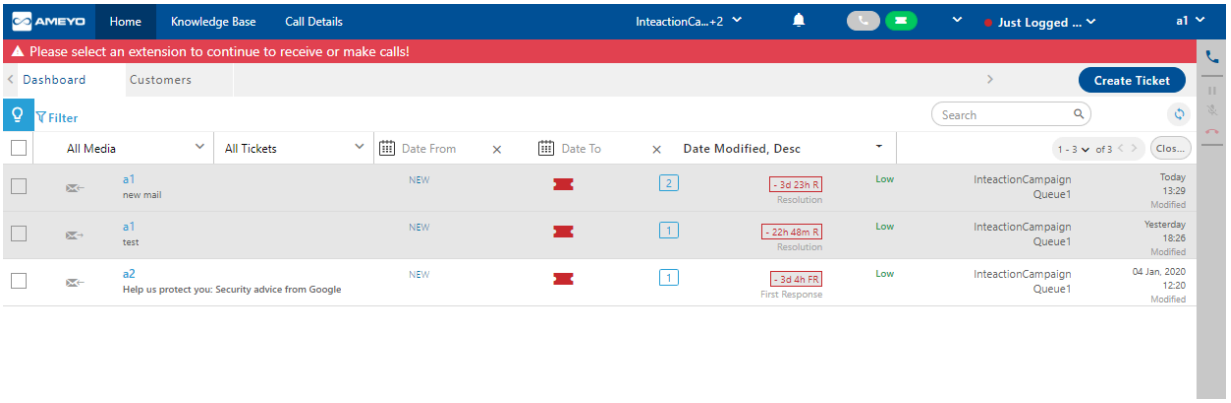


Figure: Dashboard with Cautionary sign

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

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

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

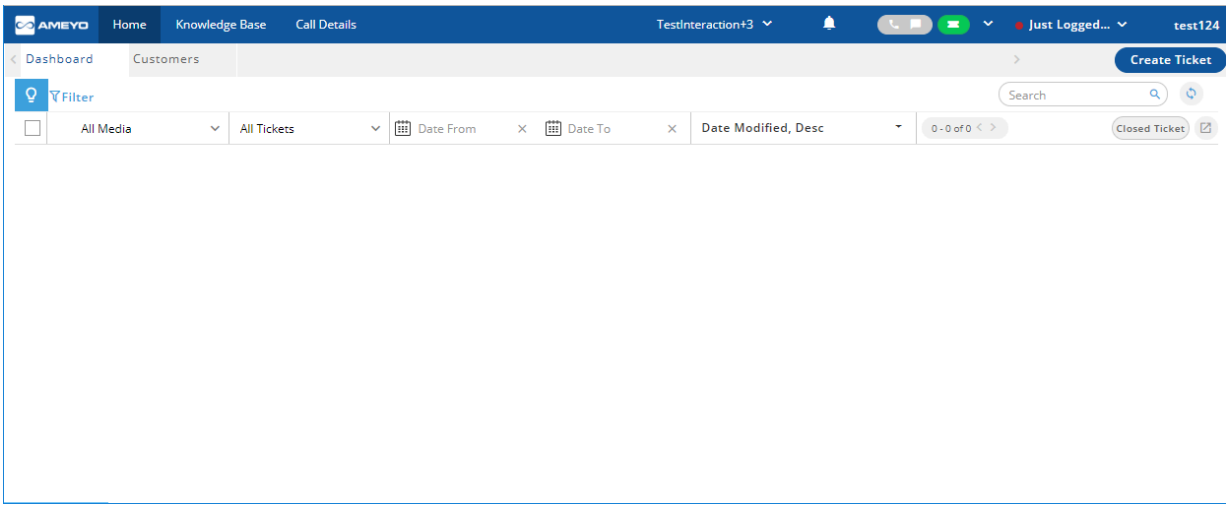


Figure: Home Screen

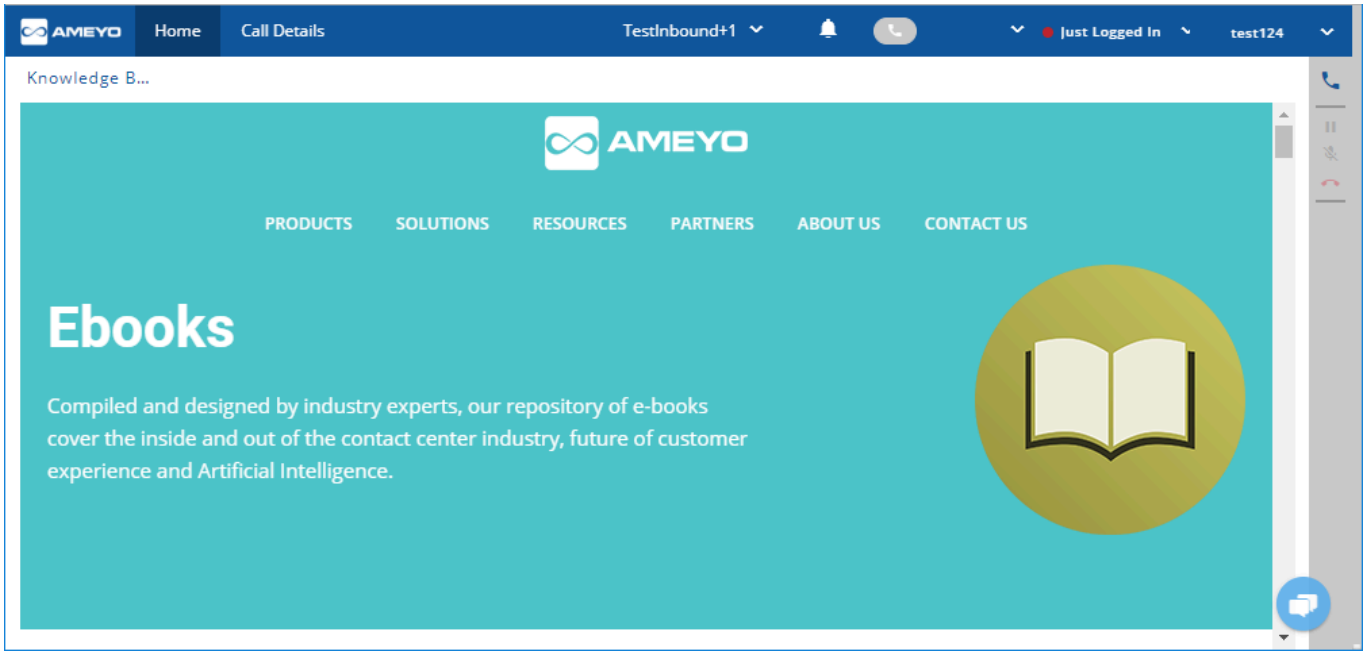


Figure: Home Screen of Agent in Voice Only

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

19.3.5. Manage Customers

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

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

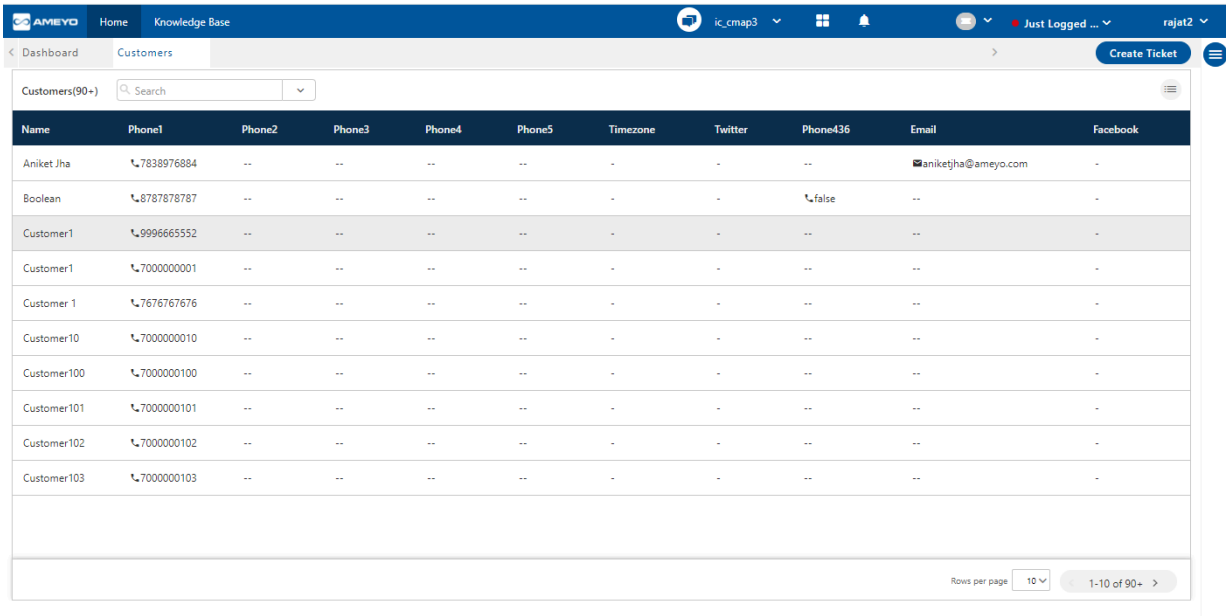


Figure: List of Customers

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

1. **Customer Name:** The first column of the customer information contains the name of the customer's name.
2. **Phone:** This column of the customer information contains the phone number of the customer. Here, all the phone fields such as Phone1, Phone2, Phone3, and so on; that the administrator has created at system level is showing
3. **Email ID:** The Email ID column of the customer information page contains the email-id of the customers.

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

Operations

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

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

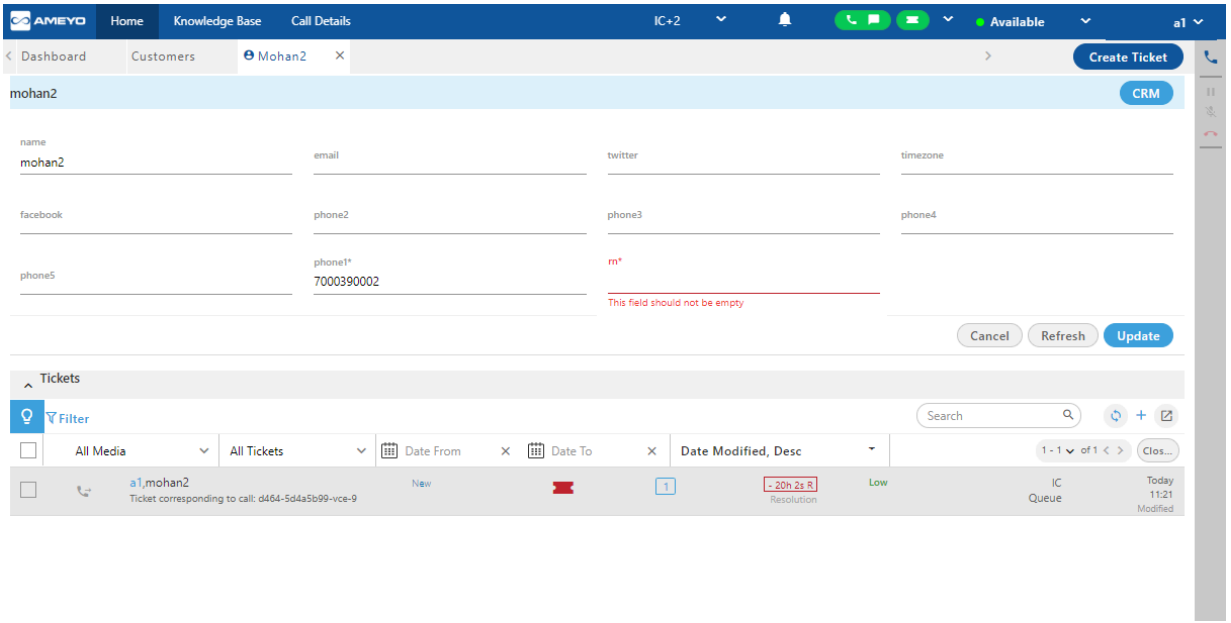


Figure: Information of Customer

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

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

- **View Customer's information:** The first column of this page shows the customer's personal information. Agent can view the details or modify them if needed.
    - The Agent Table Definition allows the Administrator define the order of appearance of the customer information fields and mark the fields in which the agent can change the values or not.

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

Important Points

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

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

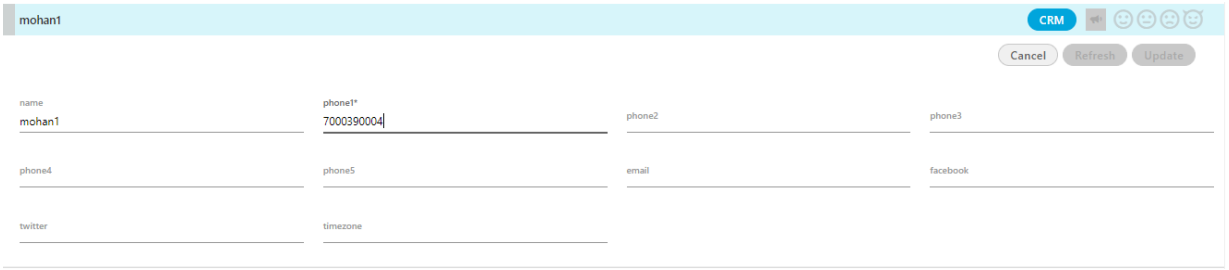


Figure: Edit Customer Information

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

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

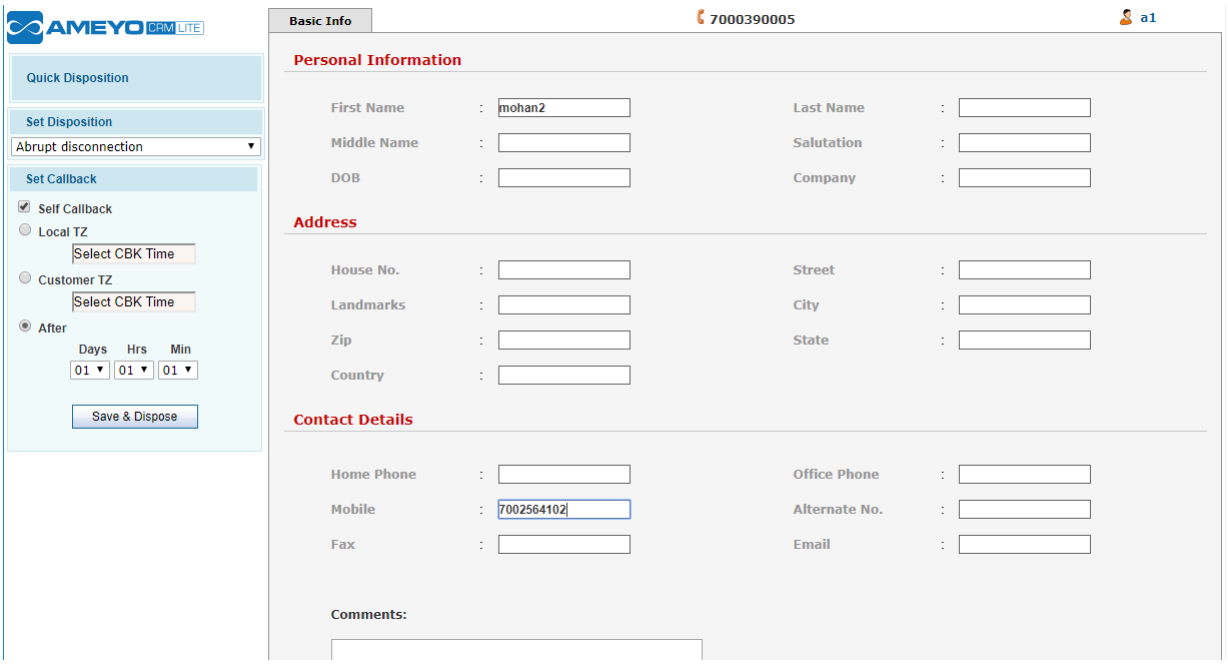


Figure: Customer Information on CRM

2. Ticket Dashboard

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

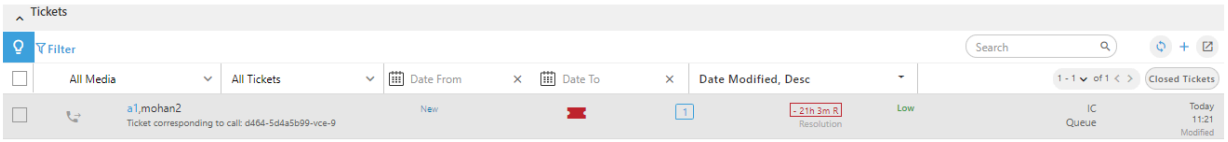


Figure: All tickets of the opened customer

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

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

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

19.3.6. Manage Customer Communications

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

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

19.3.6.1. Voice Communication with Customer

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

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

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

19.3.6.1.1. Call Details

Call Details

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

- Callbacks
- Call History

Callbacks

This tab shows the callbacks scheduled for the agent at system level (for all campaigns).

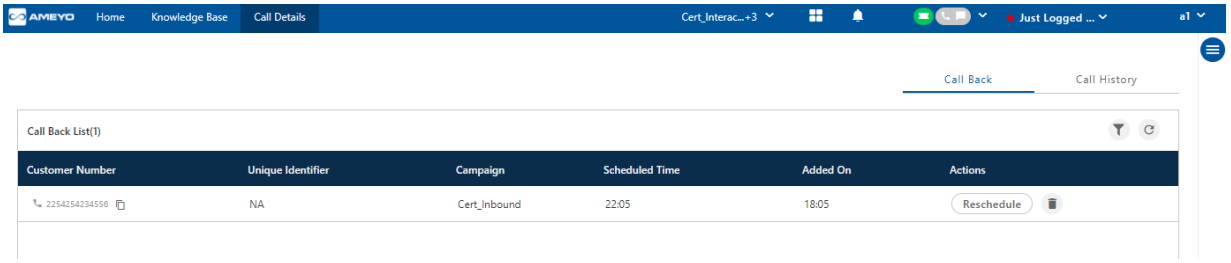


Figure: Call Back Tab

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

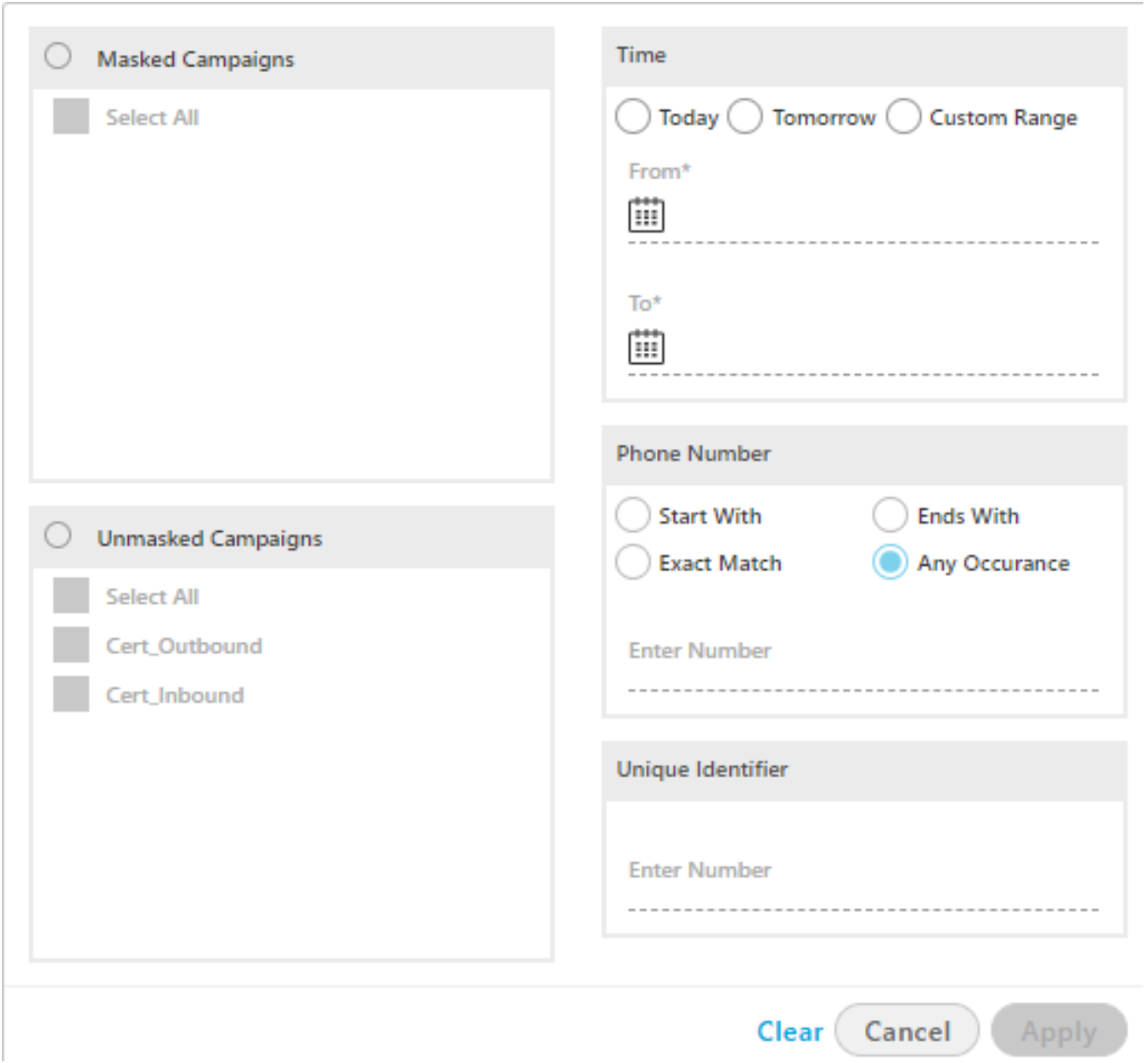


Figure: Call Back Filters

The agent can filter the call details with the following filters.

1. **Masked Campaign:** It contains the list of the campaigns in which masking is enabled. If the agent is not assigned in the masked campaign then no campaign will be shown in the list.
2. **UnMasked Campaign:** It contains the list of the campaigns in which masking is not enabled. The agent can select multiple campaigns to filter the callbacks lists.
3. **Time:** Provide the time range for which the agent wants to filter the call details. The agent can choose the time from the available following filters.
    - **Today:** It shows all the call-back details of the same day.
    - **Tomorrow:** It shows the scheduled call-back details of the next coming day.
    - **Custom Range:** It shows all the scheduled call-backs of the provided range of the date. Once you select the date, the present time is selected automatically.

4. **Phone Number:** Provide the specific phone number for which the agent wants to filter the scheduled call-back. Following are the filters present to see all the call-backs.
    - **Start With:** It lets you to search the call details of the phone number while providing its initial few digits of the phone number.
    - **Exact Match:** It lets the agent to search the call details of the customer whose phone number is provided as it is.
    - **Ends With:** It lets you to search the call details of the phone number while providing its last few digits of the phone number.
    - **Any Occurrence:** It lets the agent to search for all the details of the phone numbers whose few digits are provided.
5. **Unique Identifier:** If the masking is enabled, then a unique identifier will generate for every callback. The agent can provide this unique identifier to filter the callbacks.

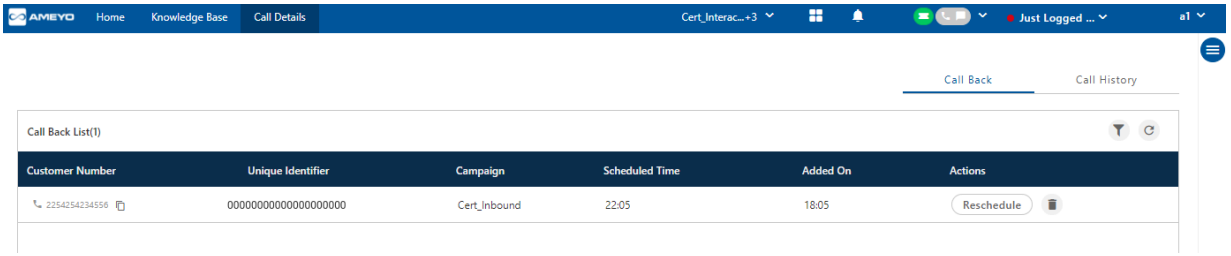


Figure: Filter Callbacks based on Unique Identifier

Select the Campaign name, Time of the callback or the phone number to get the list of the callback. Click "Apply" button.

Click "Clear Filter" to clear the filter and to view the default list of all callbacks.

> Agent can see only his callback list. The agent is not allowed to watch the other agent's scheduled callbacks.

Click to Dial Callback

There are cases when the agent will not be present at seat at the scheduled callback time or the agent has to call early from the defined time to the customer whose callback is scheduled. In such cases, the agent can click 9632014587 icon on the callback list to dial the call directly from the callback page. It helps and save the time of the agent.

After clicking a number, the agent will be redirected to "Workbench" tab from "Callback" tab and a CTI pop-up is displayed.

If the call is ongoing, then an error message will be displayed when the agent clicks on the number to dial it.
As soon as a number is dialed in "Callback" tab through Click to Dial or another method, it will be removed from Callback list even if it was dialed before its scheduled time.

> If the customer name is not filled or left blank, then at the time of the callback the telephony panel will display "UNKNOWN" as the customer name.

Reschedule Callback

Agent can reschedule the date and time of his callbacks at any time. Perform the following steps to reschedule the callback.

1. Select the callback from the list of the callbacks.
2. Click Reshedule button.
3. A pop-up comes up in which you have to provide the date and time of the callback.
4. Enter the date in *"dd:mm:yyyy"* format.

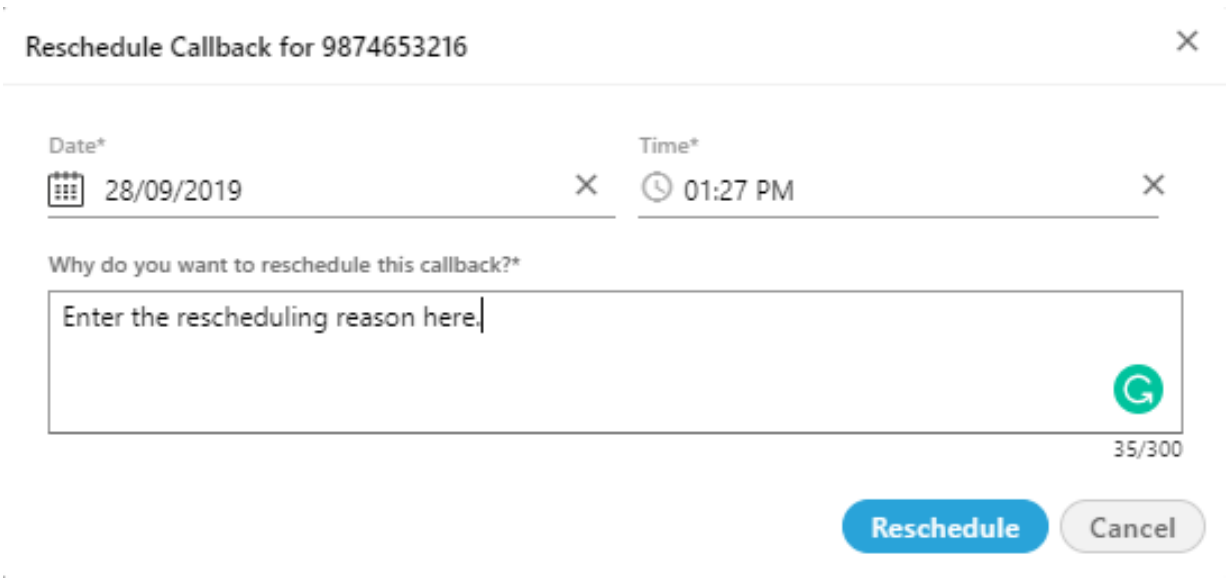


Figure: Reschedule the Callback

5. Select the Time from the clock and then click "OK" button.
6. Enter the reason for which you are rescheduling the call.
7. Click "Reschedule" button.

The call is successfully rescheduled. The agent can check the same from the callback list.

Delete Callback

Click icon to delete the scheduled callback.

A pop-up comes up in which you have to enter the reason. Reason is mandatory to enter, otherwise the callback will not delete. Click "Delete" button to delete the file otherwise click "Cancel".

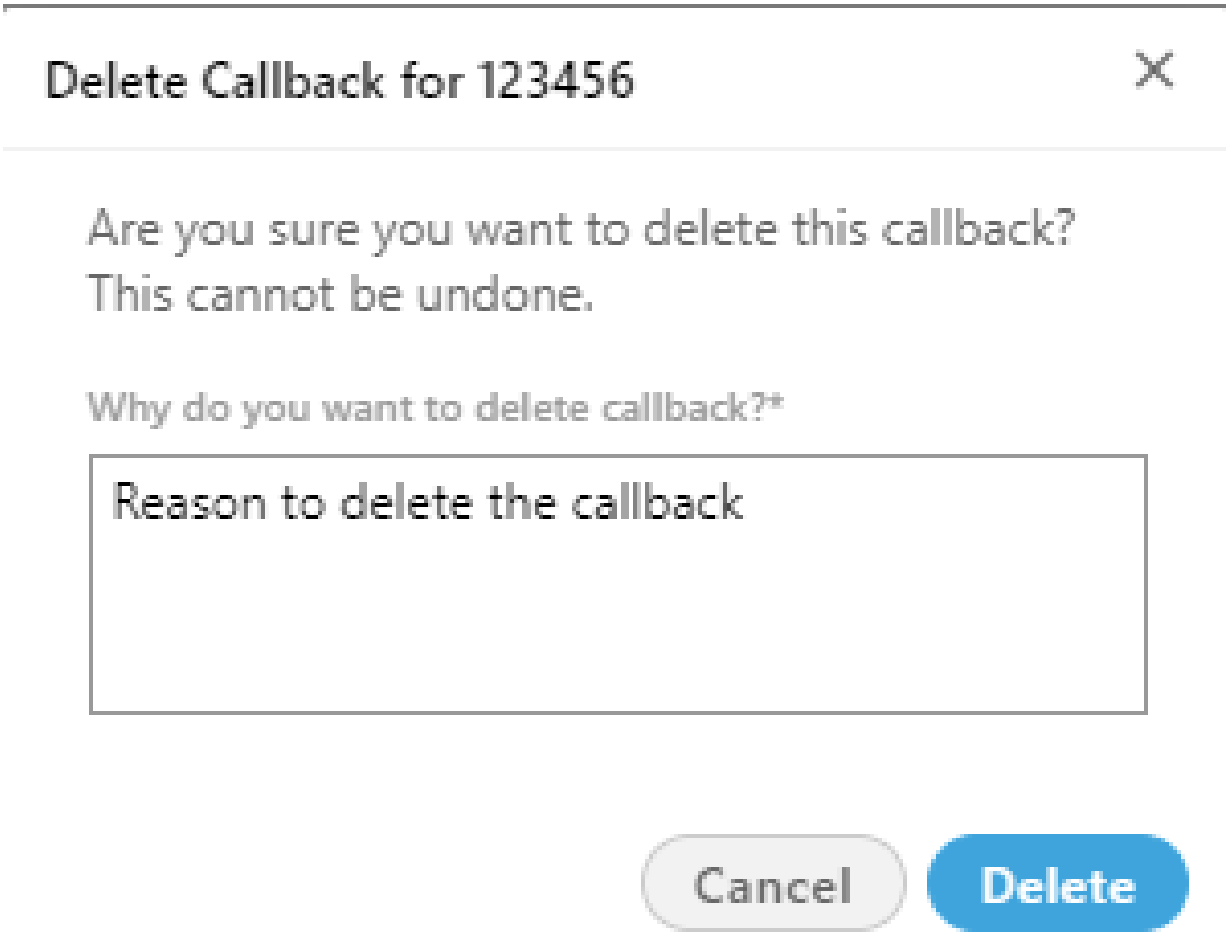


Figure: Delete pop-up

Call History

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

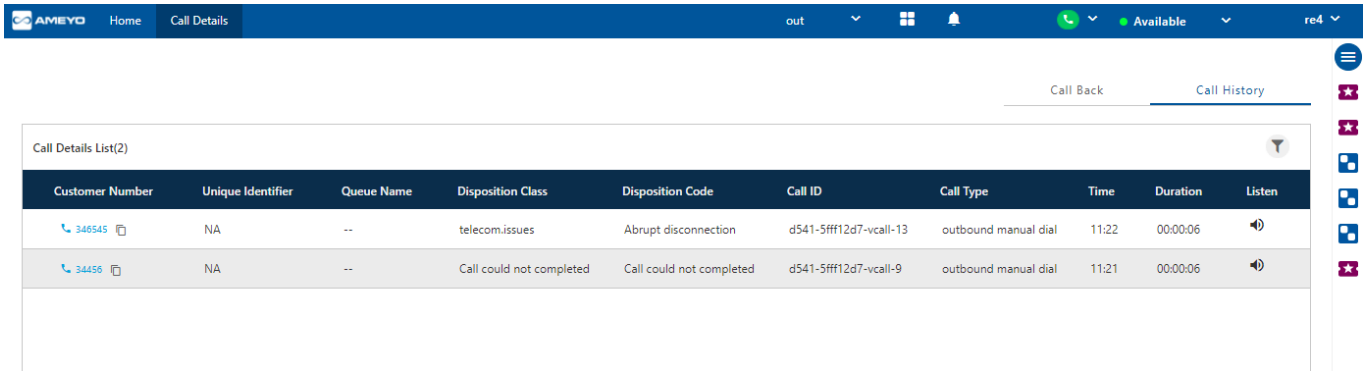


Figure: Call History

Call History is shown in terms of the following attributes.

1. **Customer Number:** It shows the customer number on which call was made or from which call was received.
2. **Unique Identifier:** If the masking is enabled in a campaign then a unique identifier will generate and show in this column for the respective call.
3. **Queue Name:**It shows the queue name in which call was received.
4. **Disposition Class:** It shows the disposition class with which the respective call was disposed.
5. **Disposition Code:** It shows the disposition code with which the respective call was disposed and used by the agent.
6. **Call ID:** It shows the Id of the call. Every call has its unique Id.
7. **Call Type:** It shows the type of the call.
8. **Time:** It shows the date and time at which the inbound call came or at which the outbound call was dialed.
9. **Duration:** It shows the total call duration of the respective call.
10. **Listen:** It shows the voice recording of the call. For connected calls, recording is played and agent can listen to that call and also he can download that voice log by clicking on (download) symbol, For, non-connected logs, it will not play any recording.



Figure: Play Call Recording

The agent can download the voicelogs of the searched phone number from the listen pop-up. Click the download icon and the pop-up to save the voicelog will come.

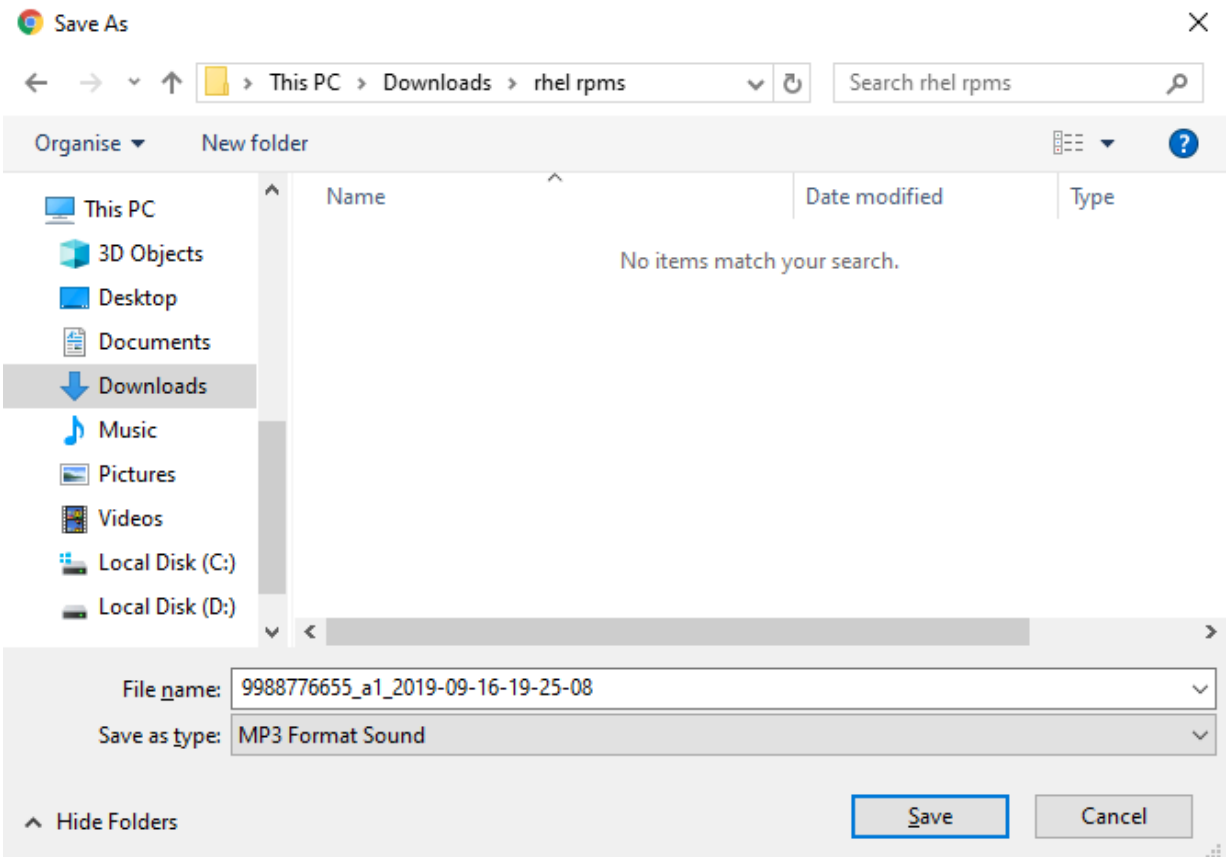


Figure: Download Call Recording

Provide the download location and you may change the name of the downloading file as well from here. The default name of the voicelog is the phone-number of the customer followed by the agent name and the time of the call.

> The downloading pop-up depends upon the browser's settings.

Copy Phone Number

The agent can copy the phone number of the customer. Click icon to copy the phone number of the customer. After copying the phone number the agent can paste the copied phone number in the telephony panel to make a call.

Call Notes

The notes which are given by the agent at the time of the calls are known as call notes. The agent can view these notes along with the details of that call. Click icon to view the call notes of that call.

The agent can filter for the calls in which the call notes are given through filters option.



Figure: Filter Call Notes

Click-to-Dial Feature

Click to Dial feature on this tab allows the supervisor to make a call instantly with just a click.

The CTD (Click to Dial) icon is displayed with the phone number in "Call Details". The User can click this icon to dial the number manually. Once clicked, the CTI Pop-up is displayed. If the User is already on a call, then the error is displayed.

If the User is on "Call Details" page of Workbench and has not selected the extension, then the modal to select the extension appears during click to dial.

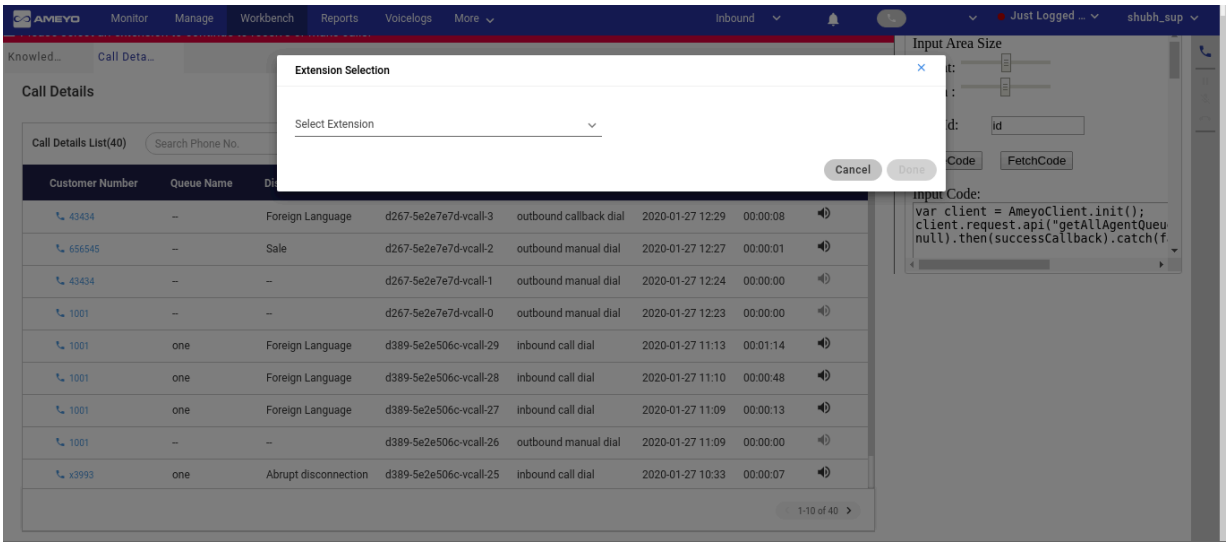


Figure: Select Extension in "Call Details" Tab

If the User is not available, then the following error message is displayed during click to dial.

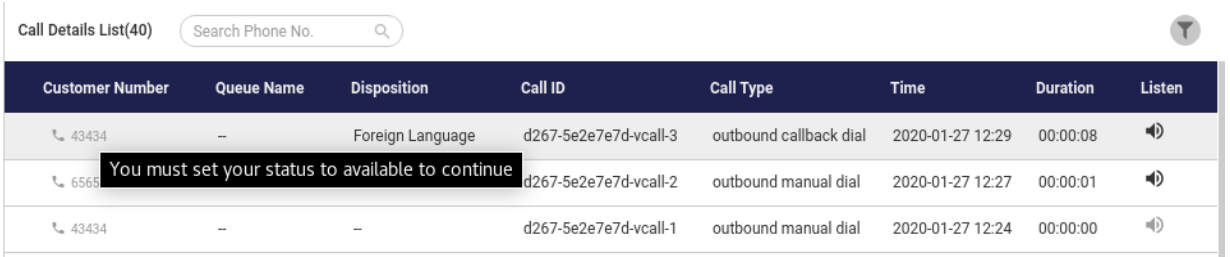


Figure: User have to set the status as Available

If the Supervisor has neither selected the extension nor logged on to the Workbench, then the following error message is displayed during click to dial.

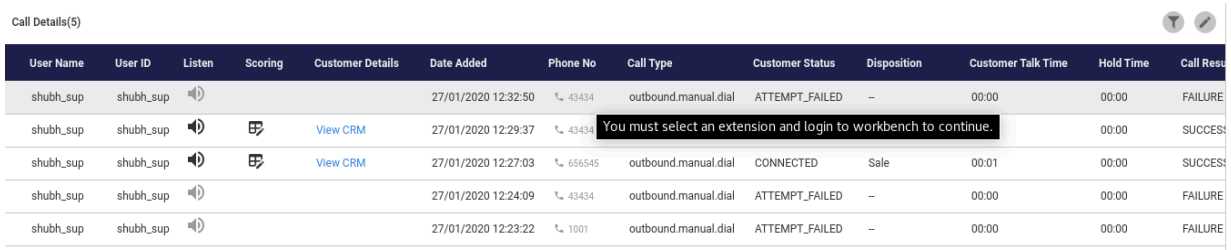


Figure: Error Message to logon to Workbench and Select Extension

If the Supervisor has selected the extension but not logged on to workbench, then the following error message is displayed during click to dial.

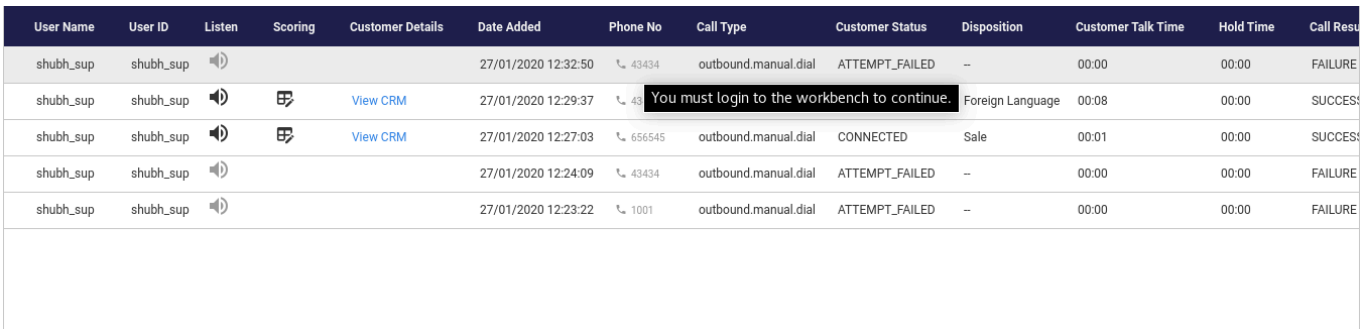


Figure: Error Message to logon to Workbench

- If the current extension of the agent is busy, then disable the CTD/show error.
- A call will be added to the call details page if the agent uses click to dial functionality.

Filter

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

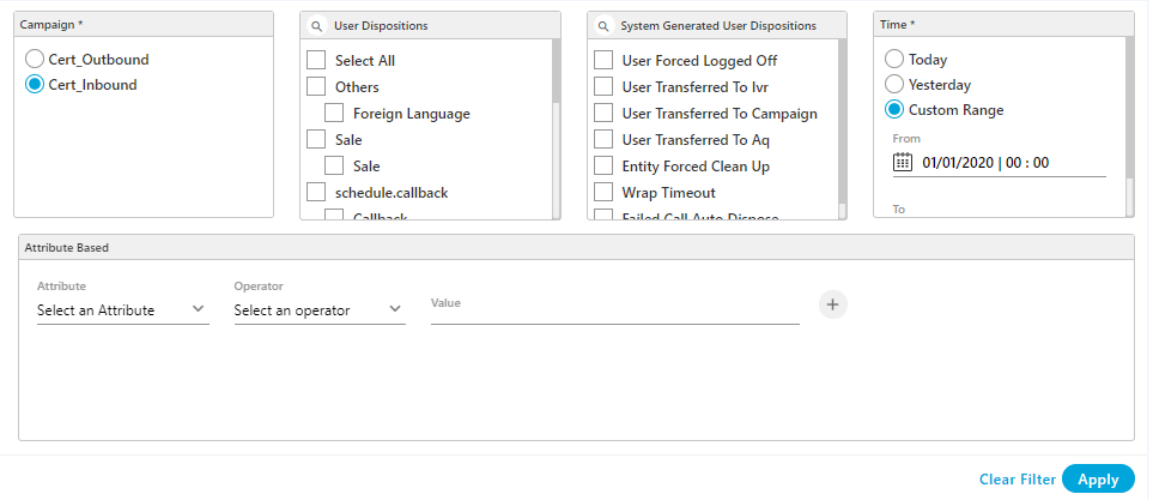


Figure: Call History Filters

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

The agent can filter the call details with the following filters.

1. **Campaign:** Select the campaign from which the agent wants to filter the call details. It contains only those campaigns in which the agent is assigned.
2. **User Disposition:** Select the user disposition for which you want to filter the call detail history.
3. **System Disposition:** Select the system generated disposition for which you want to filter the call detail history.
4. **Time:** Provide the time range for which the agent wants to filter the call details. The agent can choose the time from the available following filters.
    - **Today:** It shows all the call-back details of the same day.
    - **Tomorrow:** It shows the scheduled call-back details of the next coming day.
    - **Custom Range:** It shows all the scheduled call-backs of the provided range of the date. Once you selected the date, the present time is also selected as the

default time.

5. **Attribute Based:** Agent can select the attribute based upon the defined filterable field in the table creation. Perform the following steps to filter through attribute based filters.
    - Select the campaign in which attribute based filter, that is, the filterable fields are mapped.
    - Now, in attribute based filter section, select the attribute type, which is the column name which is mapped as filterable field in campaign by the administrator.
    - Select the operator type through which you want to filter the calls. It contains the following three operators.
        1. **Contains:** It filter the calls which contains the provided input in their values.
        2. **Equals:** Selecting "Equals" as the operator will filter the calls which have the exact match to the applied content.
        3. **Not Equals:** Selecting "Not Equals" as the operator will filter the calls which do not have the match to the applied content.
        4. **Starts with:** It will filter those content, in which the entered attribute is starts with.
        5. **Ends with:** It will filter those content, in which the entered attribute is ends with.
    - Now, enter the value for which you want to filter the calls in the values column.

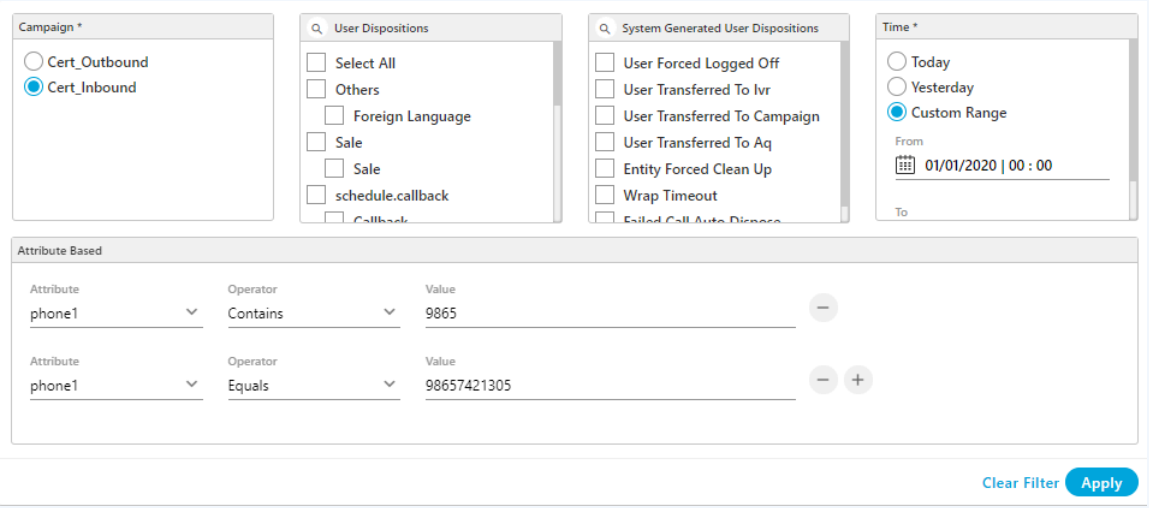


Figure: Attribute based Filter content

You can provide multiple attributes to search the content, by clicking "+" icon, or click "-" icon to delete the provided attribute based filter.

19.3.6.1.2. CTI Display, Functions, and Operations

> All the functionalities and operations of CTI Display for supervisor and group manager are similar as that of agent.

Allowed Strings to be dialed

There are several cases when the agent has to search the customer through the customer's number, name or any other string which the agent has with it. With the entered characters the Ameyo will search the customer's information who has anything related to the entered string. And, the agent can also dial that entered string of characters which may cause the issues to the call servers. But Ameyo does not allow the dialer to dial that entered string. In such cases, if the entered number has alphabets, then the "Dial only" button will remain disabled and hence, the call will not be dialed.

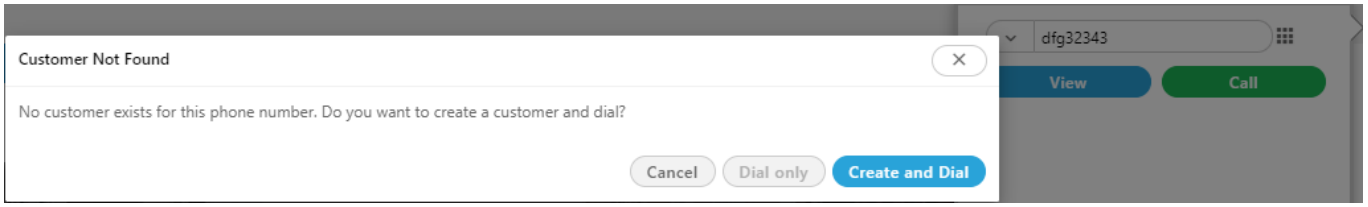


Figure: Disabled "Dial Only" button

There are two types of calls and the operations present in Ameyo.

1. **Outbound Calls:** The calls which are dialed to the customer by the Ameyo agent. Following are the CTI display available for outbound Calls.

Call to Unregistered Number

In the outbound call, if the customer is not found, then a modal is displayed to create the customer in Ameyo. In the displayed modal, there are two buttons to click from:

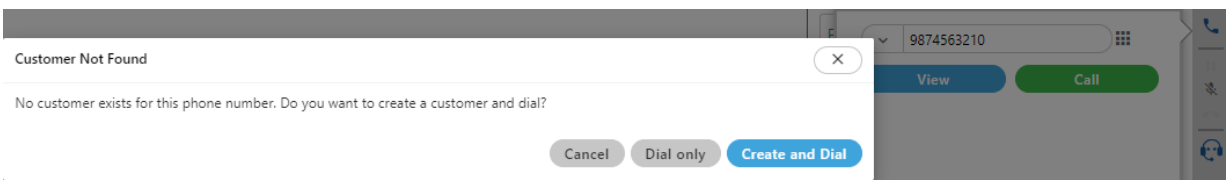


Figure: Calling Modal for Unregistered Number

There are some cases when the customer name remains blank in a customer record. For example, the Ameyo User is leaving the customer name blank while creating a new customer. In such cases, the Telephony Panel will display "UNKNOWN" during the call.

- **(Not Recommended) Dial Only:** If you click "Dial Only" button, then the call to the customer is dialed, but the customer is not created, which is not recommended. However, you can create the customer if you want at the end of the call. In this case, only the number of the customer will be displayed on the CTI display.

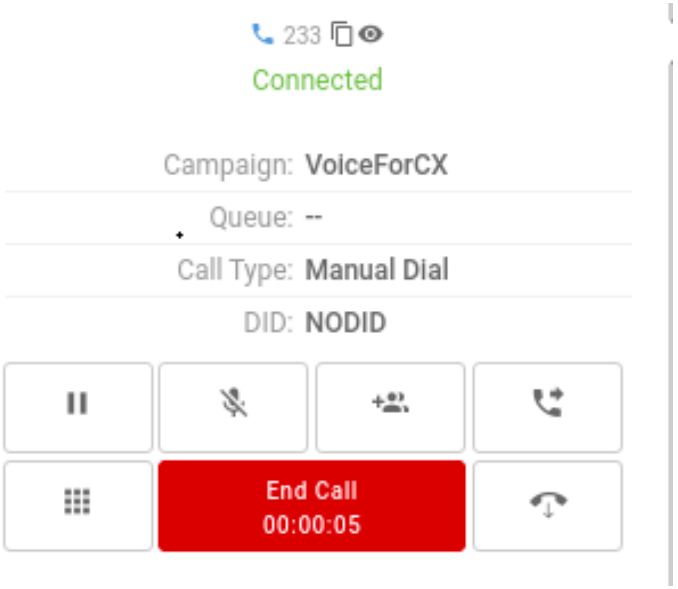


Figure: "Dial Only" the call

Create and Dial:

In Ameyo Telephony Panel, the agent can click the "Create and Dial" button which allows the agent to create the customer and then dial the call. The following screen comes up, where the agent can create the customer.

Information about Primary Phone Number from Telephony Panel: If Ameyo User is providing a number in Ameyo Telephony Panel and clicks "Create and Dial", then that phone number will be added automatically in that primary-key marked phone number field (such as "phone1").

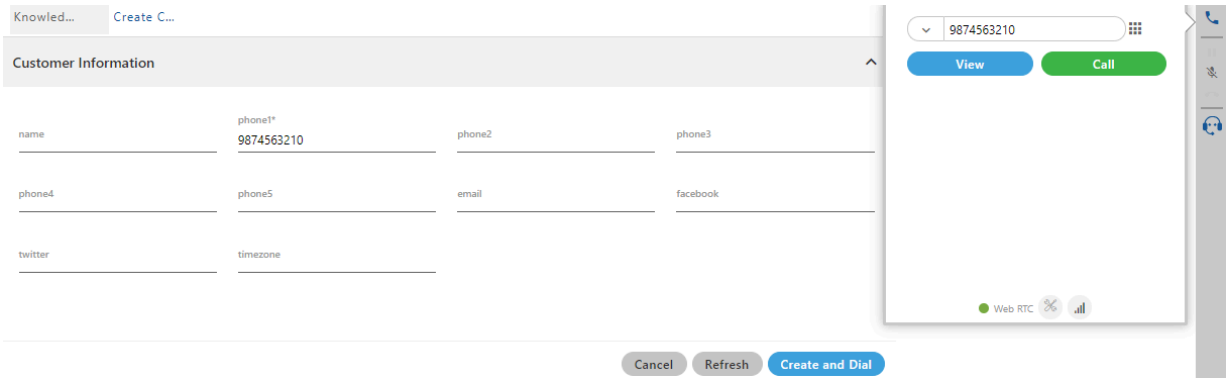


Figure: "Create and Dial" the call

Enter the details of the customer and click "Create and Dial" button.

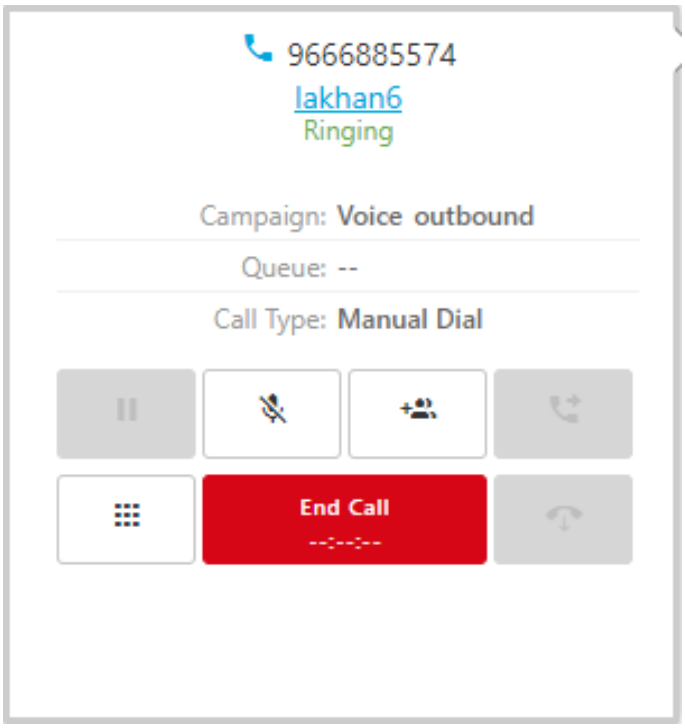


Figure: Calling the created Customer

Inbound Calls: The calls which are landed into the Ameyo or dialed by the customer to the agent of Ameyo. Following are the CTI display available for inbound Calls.

Call from the Phone Number of a Registered Customer

If the customer is found for any inbound call, then "Customer Detail" page for that customer is displayed with CTI.

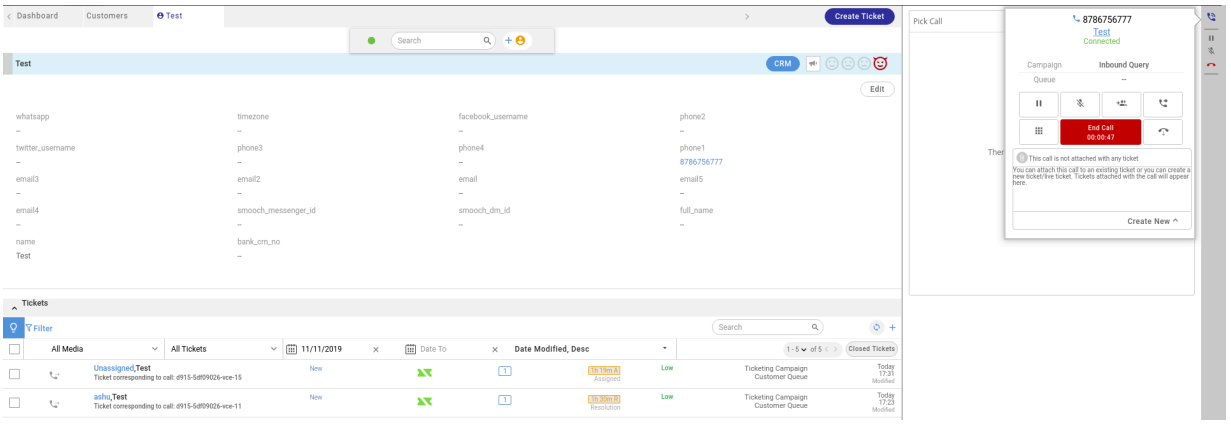


Figure: CTI pop-up from the Phone Number of a Registered Customer

Call from Unregistered Number

If the customer is not found for any inbound call, then CTI pop-up shows a blank Customer page. Here, the agent can register the details of the customer.

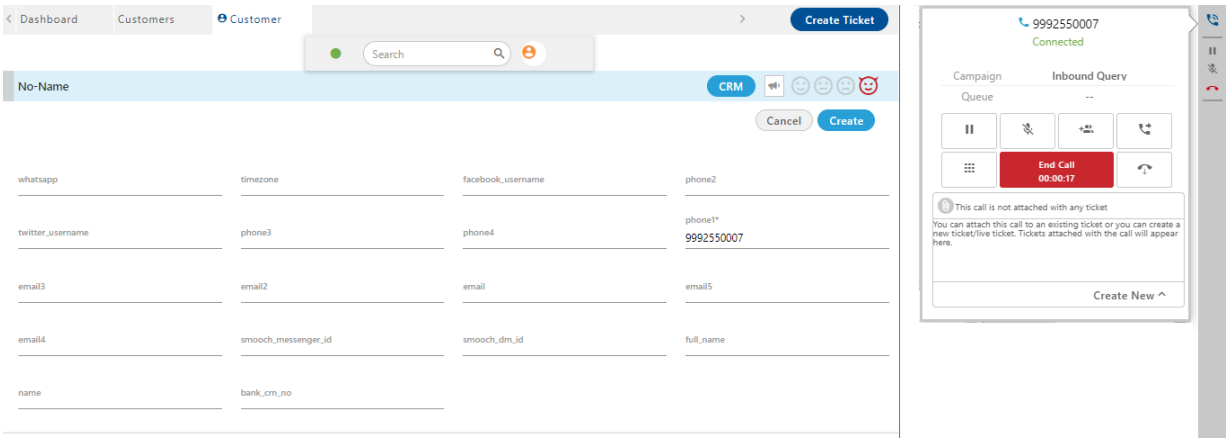


Figure: CTI pop-up for the new Customer

You can enter the details of the customer in the left panel of the CTI pop-up.

CTI Display for Multiple Customers with Same Number

In the case of Inbound Calls, the multiple customers having the same phone number (from which the call is being received) will be displayed in a pop-up. If the Ameyo CRM is not linked with Ameyo AppServer or if the customer is not registered in Ameyo CRM but in Ameyo System, then the "CustomerQuery" node will be used to resolve the customers.

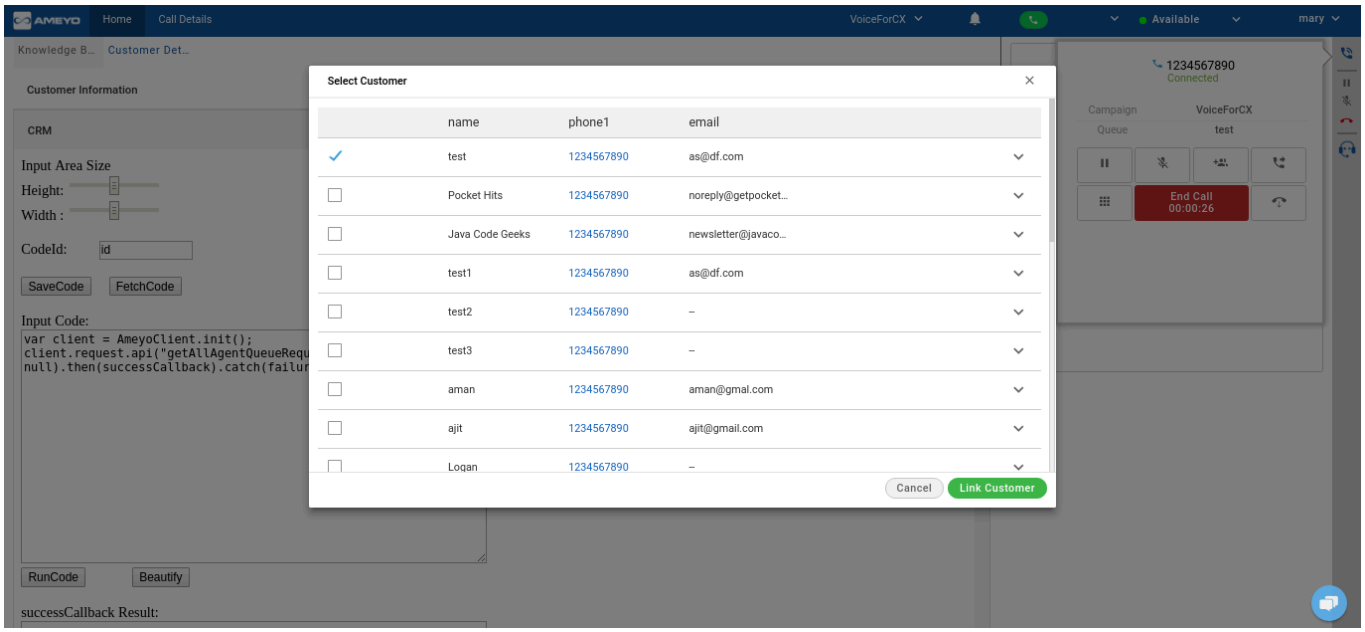


Figure: Displaying the list of Multiple Customers with the same number

Sequence to display the columns in "Multiple Customers Found" is defined through the customized Agent Table Definition of the campaign. If any phone field is not mapped in Table Mapping at System-level, then it will not be clickable and will come in the customer details. For example, you have to map "phone number 1" customer field with "phone1" Table Definition Field.

The agent can select any customer and click "Link Customer" to link this call with the selected customer.

Call Failure

There are certain cases when due to some issues, the call could not be connected. It may occur due to any of the failure reason like either customer call leg is not connected, or Agent call leg is not connected. If the customer call leg does not gets connect, there may be the provider related issues or its due to the certain general reasons which are notified to the agents by Ameyo. And, if the customer call leg does not get connect then the reason for that call failure is listed on the notification panel of the Ameyo in the notification bar. This helps the agent to know what the problem regarding the call was.

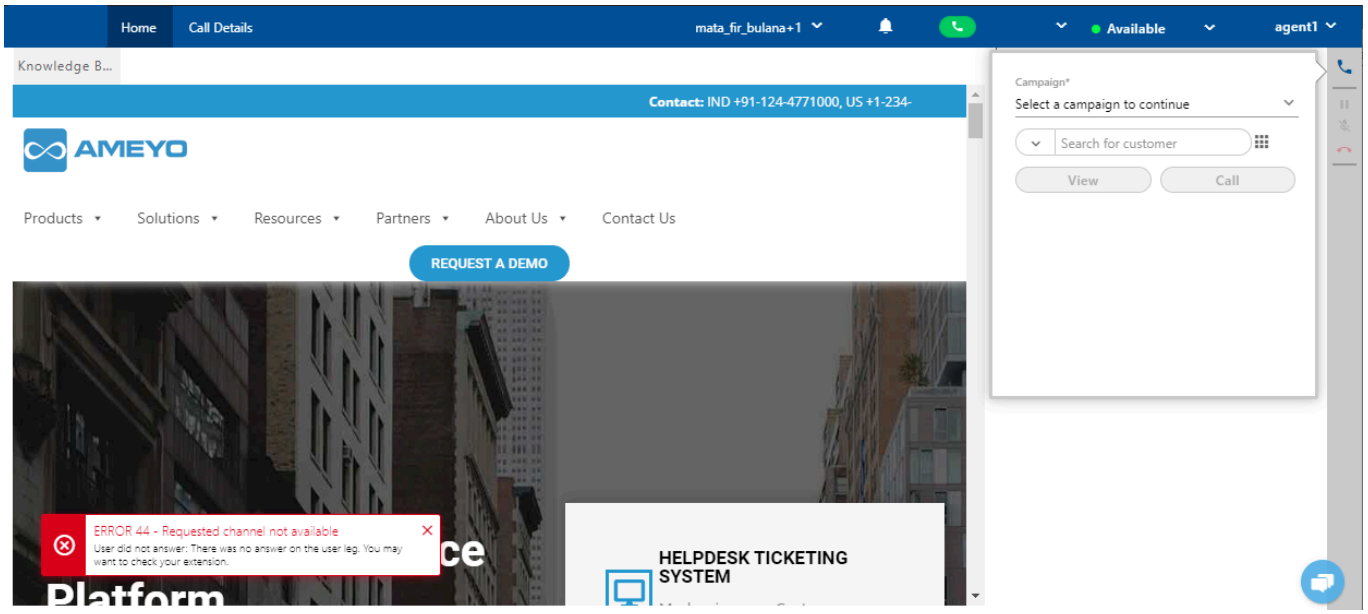


Figure: Call Failure Reason Notification

> All the notifications are also sent to the supervisors and the administrators also.

Number Masking

If number masking is enabled in any voice campaign, then the customer name and the number in masking format is displayed on the telephony panel to the agent.

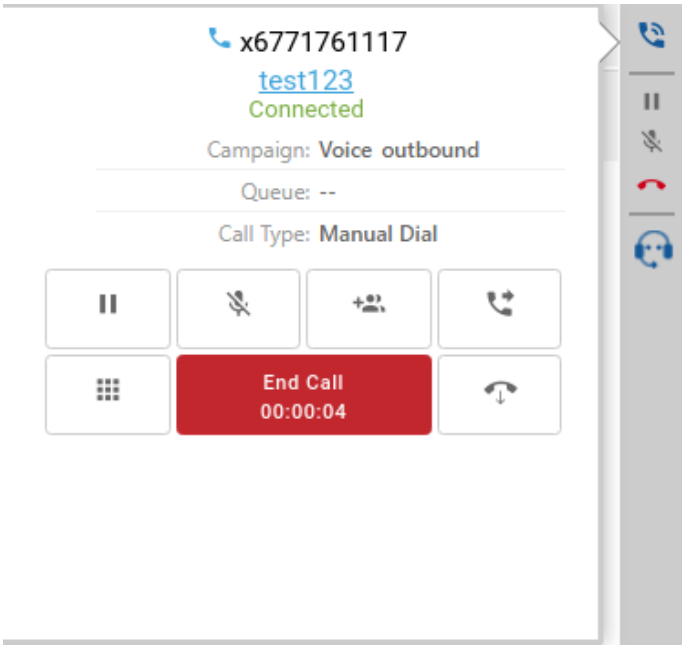


Figure: Masked Number

Option to Disable the Disposition on Active Call

There can be some cases where the call's pre-selected disposition may not be valid at the end of the call. So, if the agent is allowed to dispose of the active call before disconnection, then the selected disposition can be wrong. Therefore, some businesses want the option to disable the agents to dispose of an active call. To meet this requirement, the option to disable the disposition of Active Call is introduced in Ameyo 4.11 through a Configurable Feature.

> By default, this option is disabled, allowing those businesses to have the normal workflow that still wants to allow the agents to dispose of an active call before disconnection.

- It is applicable for both single-level and two-level dispositions.
- If the disposition of an active call is disabled and the agent tries to dispose of an active call, then an error message is displayed.

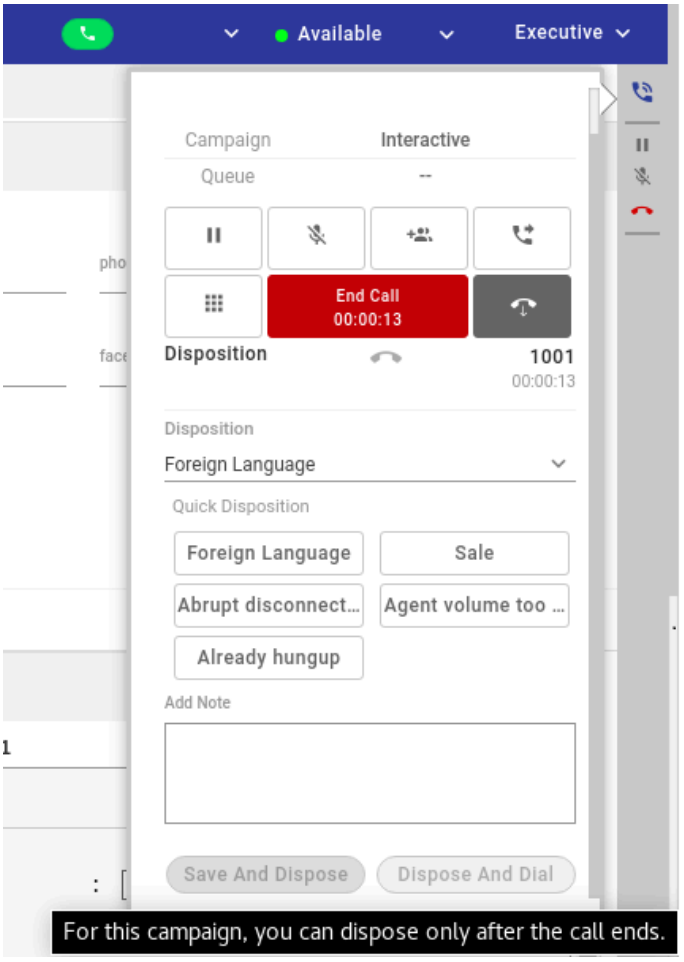


Figure: Error when the user tries to dispose of an active call

Even if the agent is scheduling a Callback, still, the agent cannot dispose of an active call.

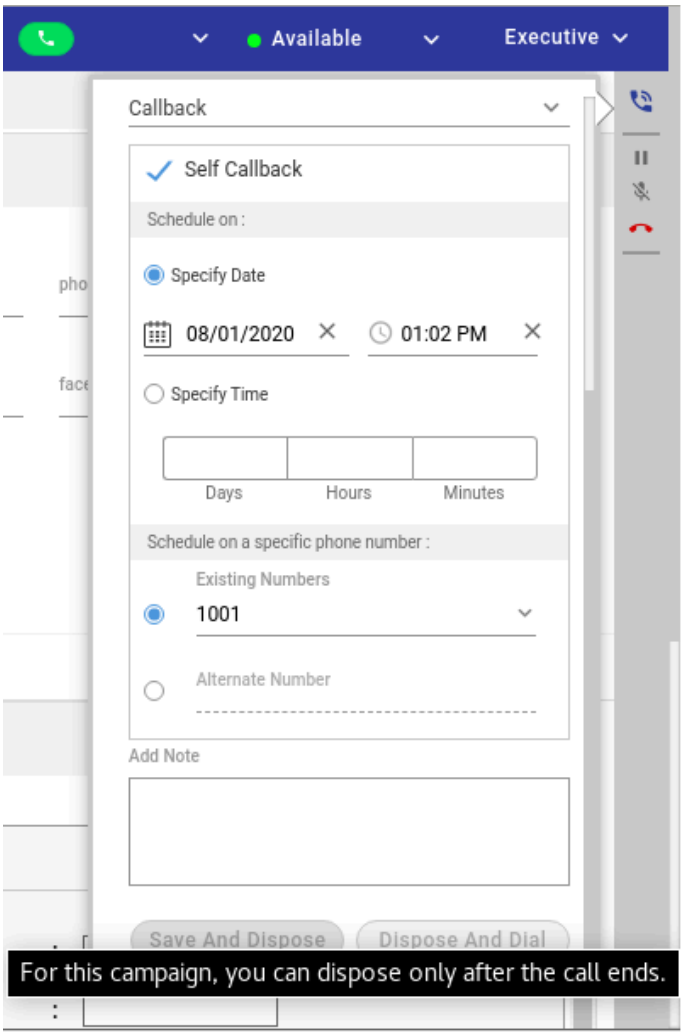


Figure: Error when the user tries to schedule the callback on an active call

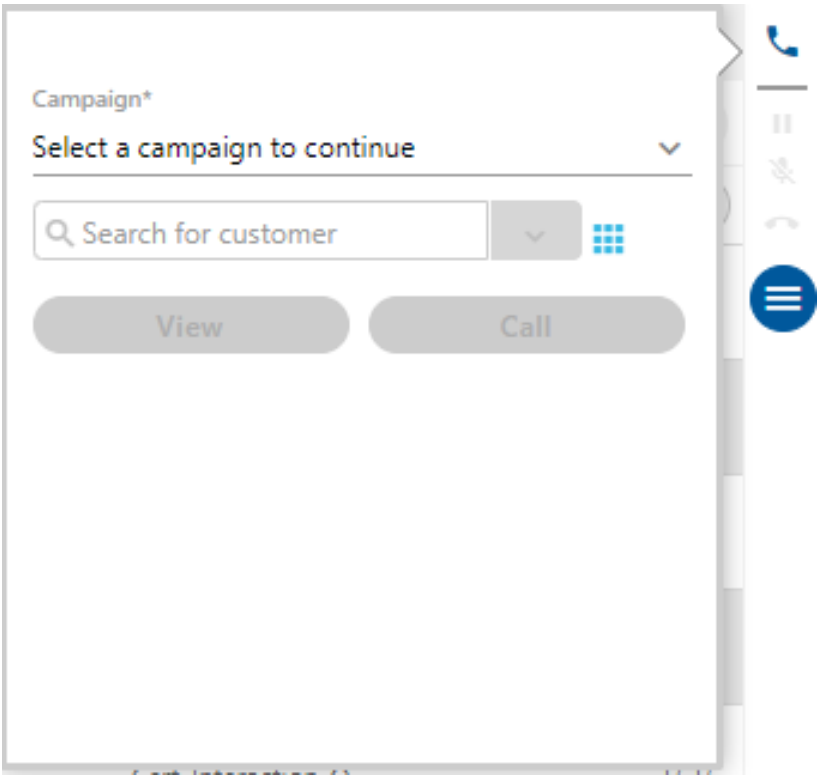
19.3.6.1.3. Voice Telephony Panel

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

There are two types of telephony panels available in Ameyo.

Voice Telephony Panel for Soft-Phone

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



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

Voice WebRTC Telephony Panel

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

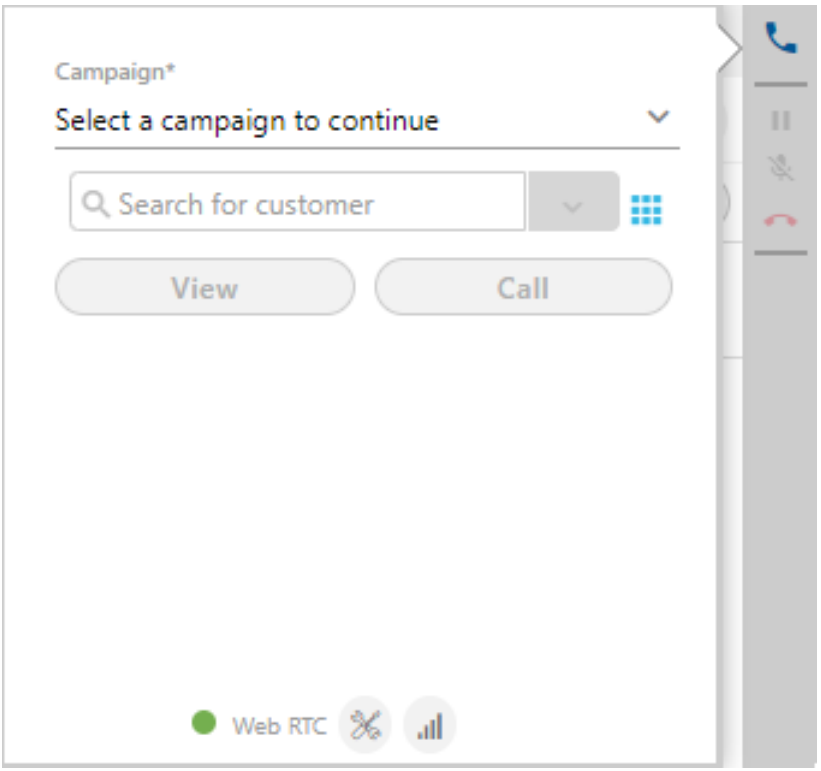


Figure: Telephony Panel

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

Refer to the following pages.

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

Functions on Telephony Panel

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

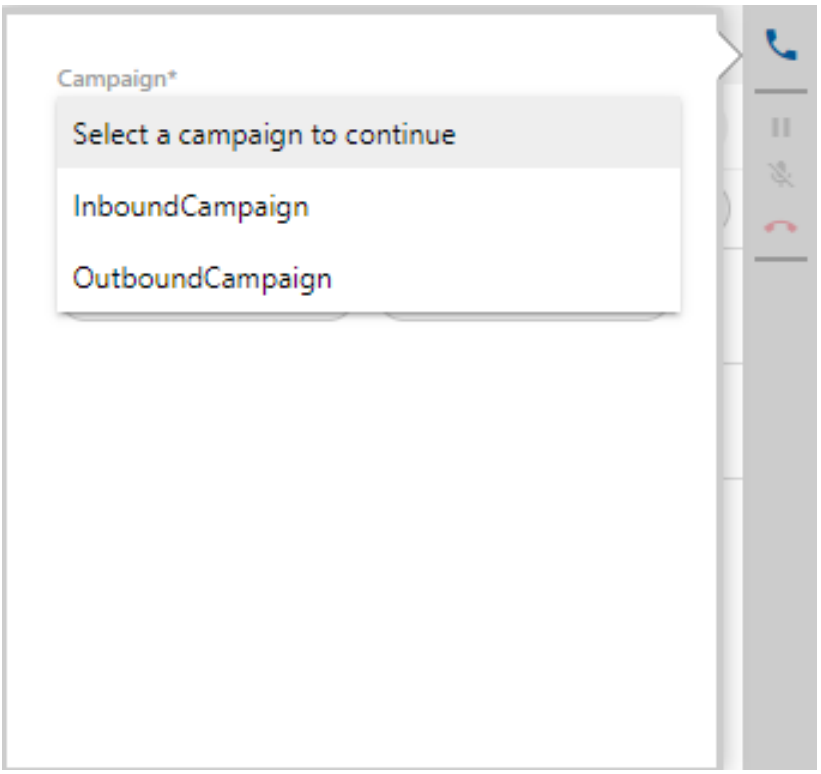


Figure: Campaign Selection

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

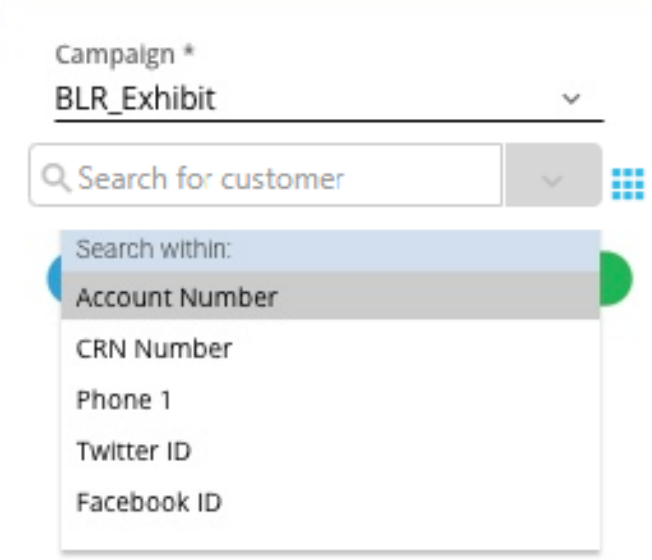


Figure: Select Field in Telephony Panel

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

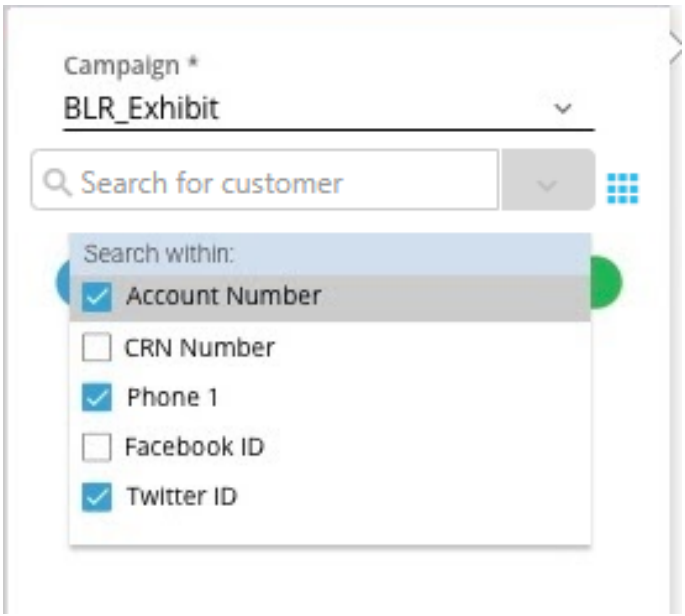


Figure: Select the Searchable Fields in the Telephony Panel

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

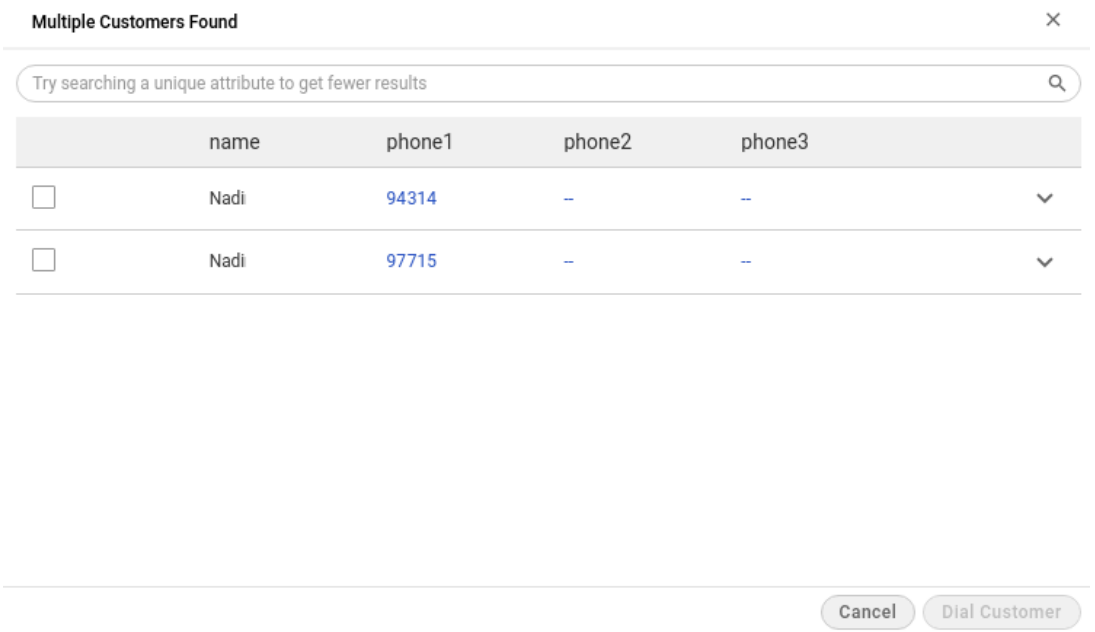


Figure: Multiple Results for a search

- Click "View" to view the Customer Information page and click "Call" to access "Create and Dial" or Dial Only" options.
- Inbound Call
- Outbound Call
- Call Control Functions

- Attach Tickets with Call

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

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

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

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

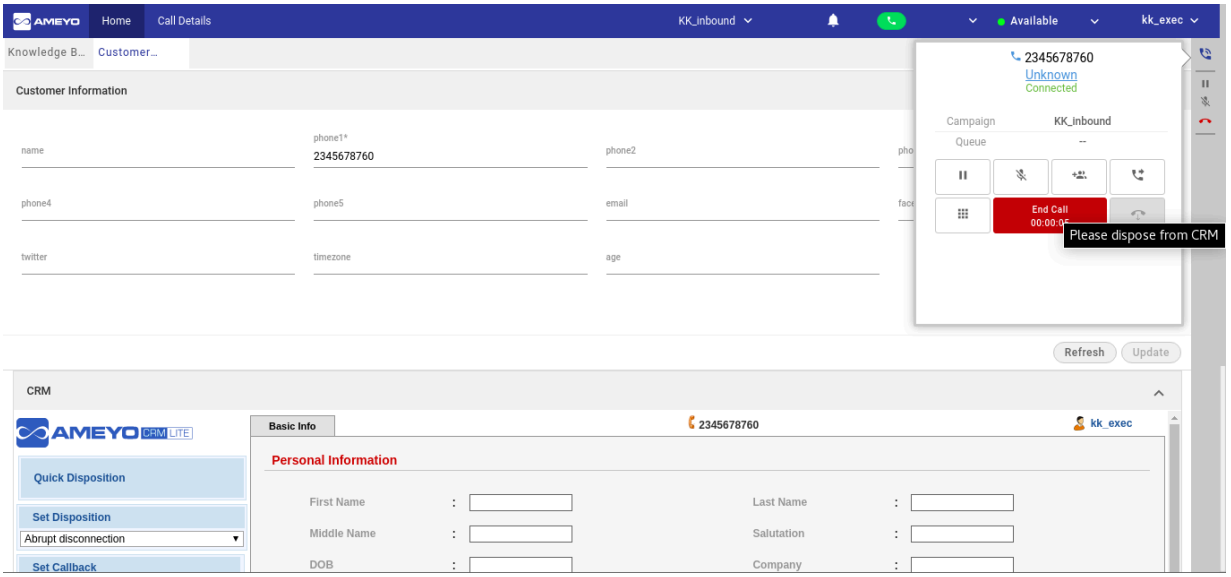


Figure: Disposition of Call is disabled in Telephony Panel

If the disposition is restricted at the telephony panel but can be done at CRM, then the "ACW Timer" is displayed in the tooltip of the phone icon in the right panel after the call disconnection (since the telephony panel is not shown to the agent). When the agent disposes of the call from the CRM, then an inline message is displayed on the page.

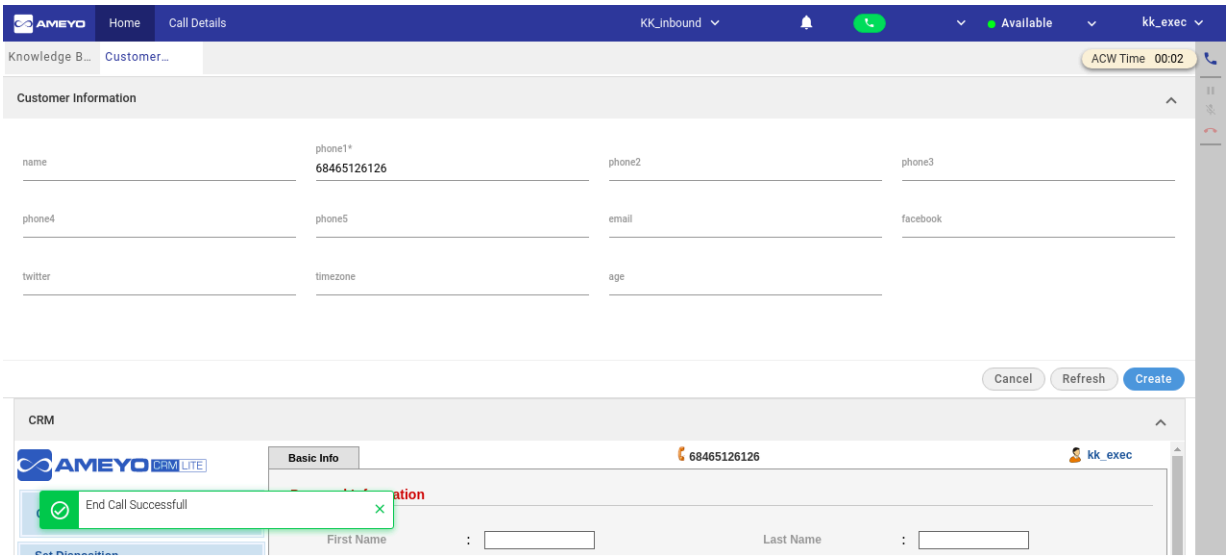


Figure: Disposed of the Call from CRM

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

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

Availability of DID Number in Telephony Panel

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

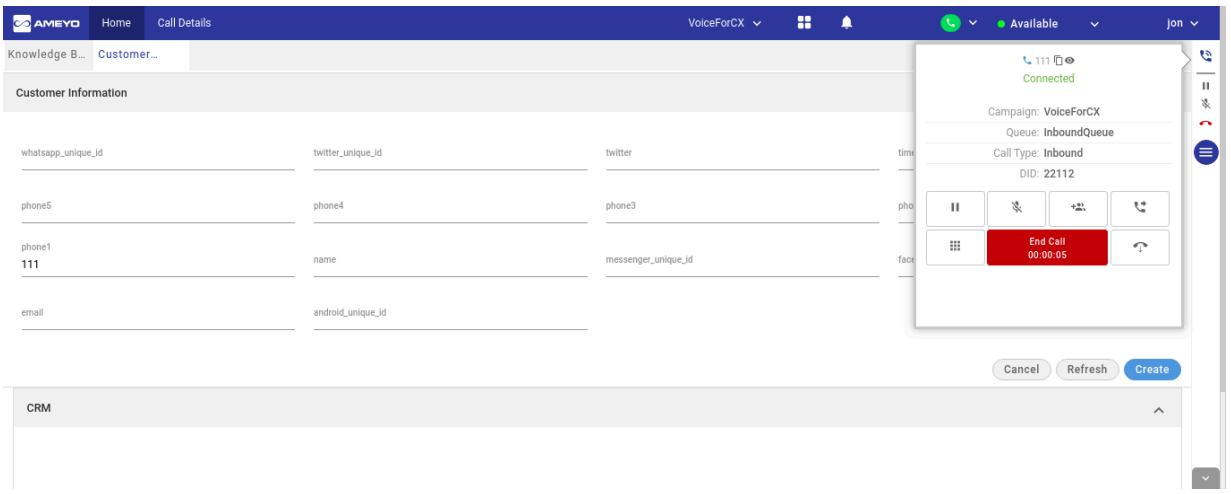


Figure: DID Number showing on Telephony Panel

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

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

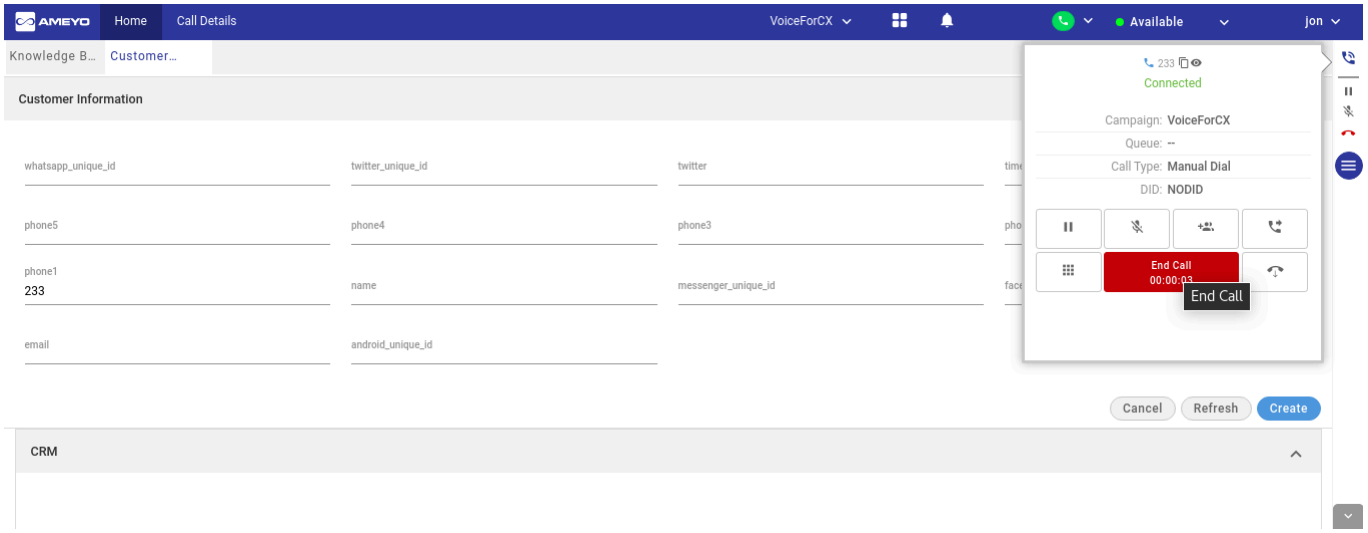


Figure: Caller ID showing for Outbound Calls at Telephony Panel

19.3.6.1.4. Inbound Call

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

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

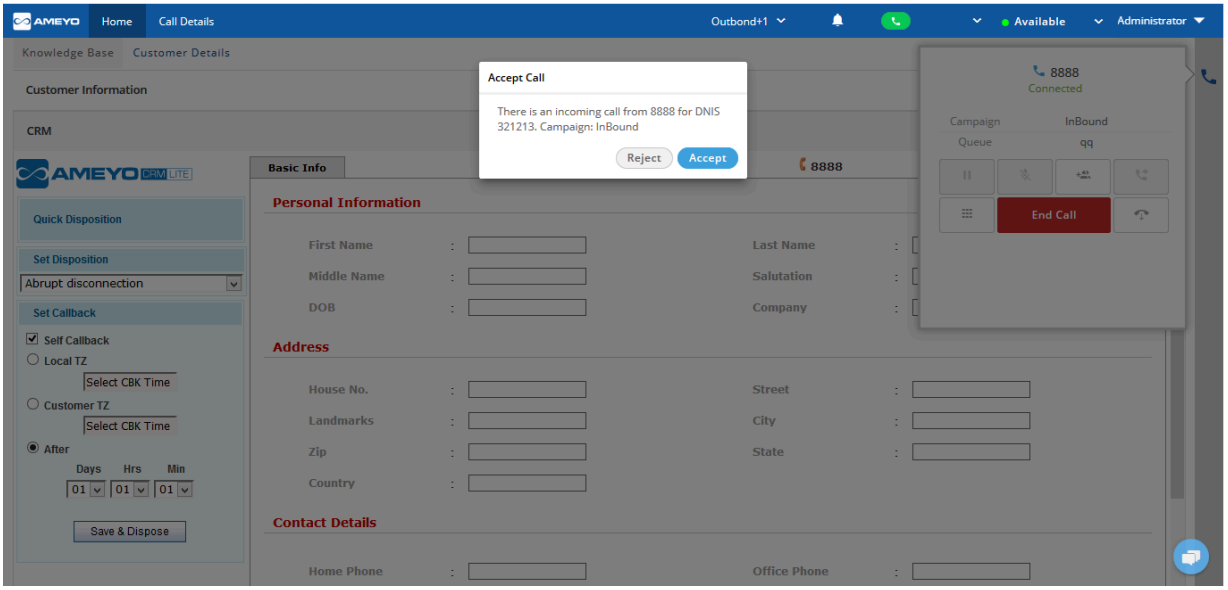


Figure: Call Notification

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

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

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

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

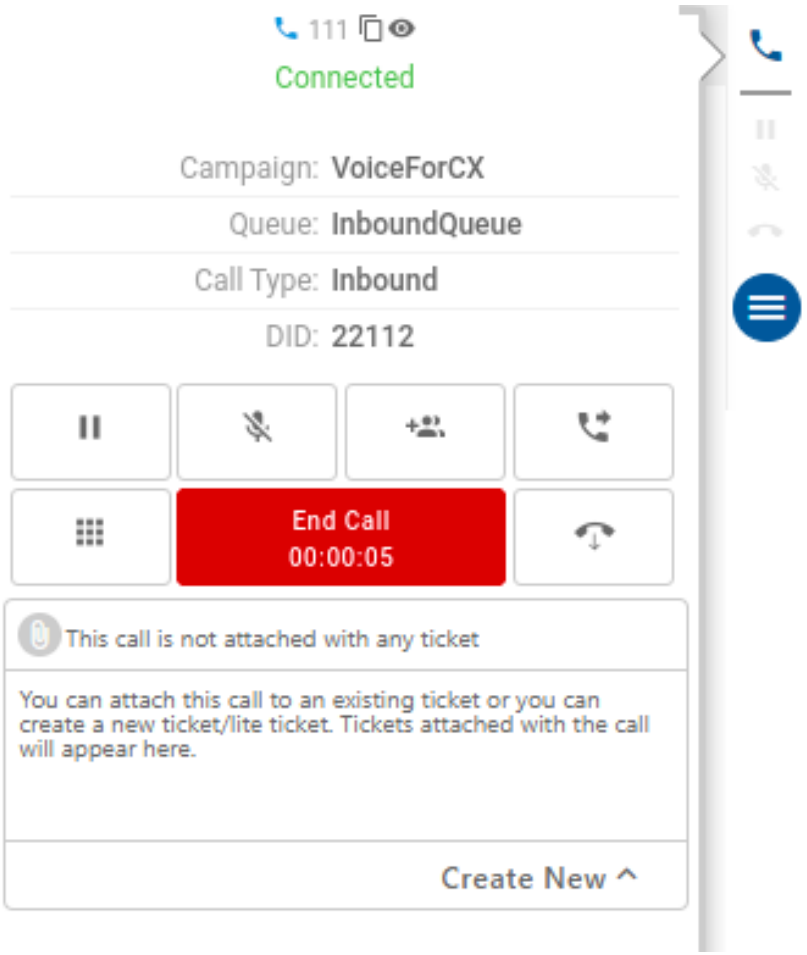


Figure: Agent Communicating with the Customer on Incoming Call

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

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

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

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

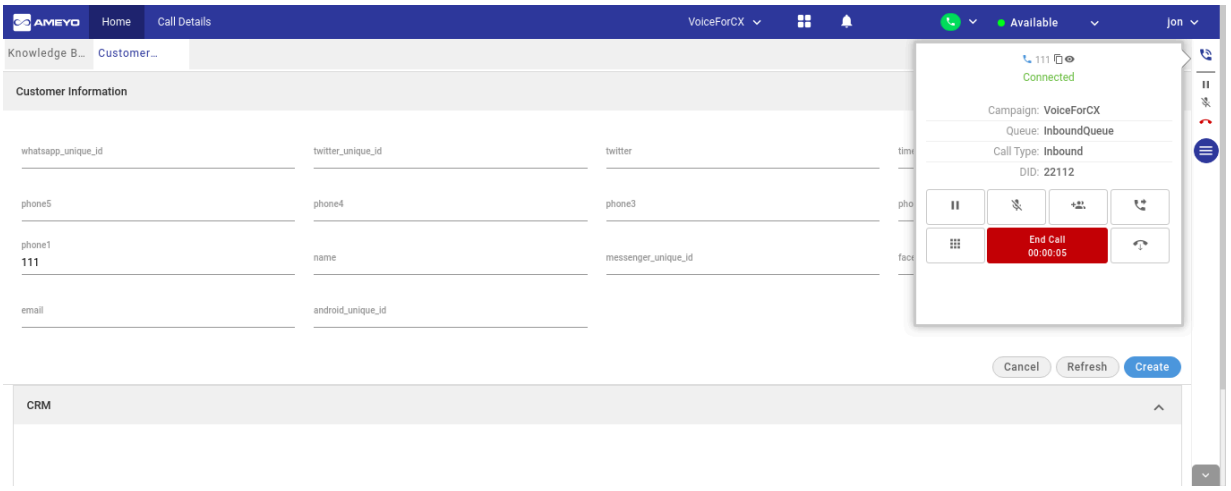


Figure: DID Number showing on Telephony Panel

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

19.3.6.1.5. Outbound Call

Outbound Call to the Customer

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

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

View Customer Information and Click to Call

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

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

1. In "Customers" Tab, click the customer that has a phone number. Its information is displayed in a new tab.**Figure:** Calling a Customer through Customer Information

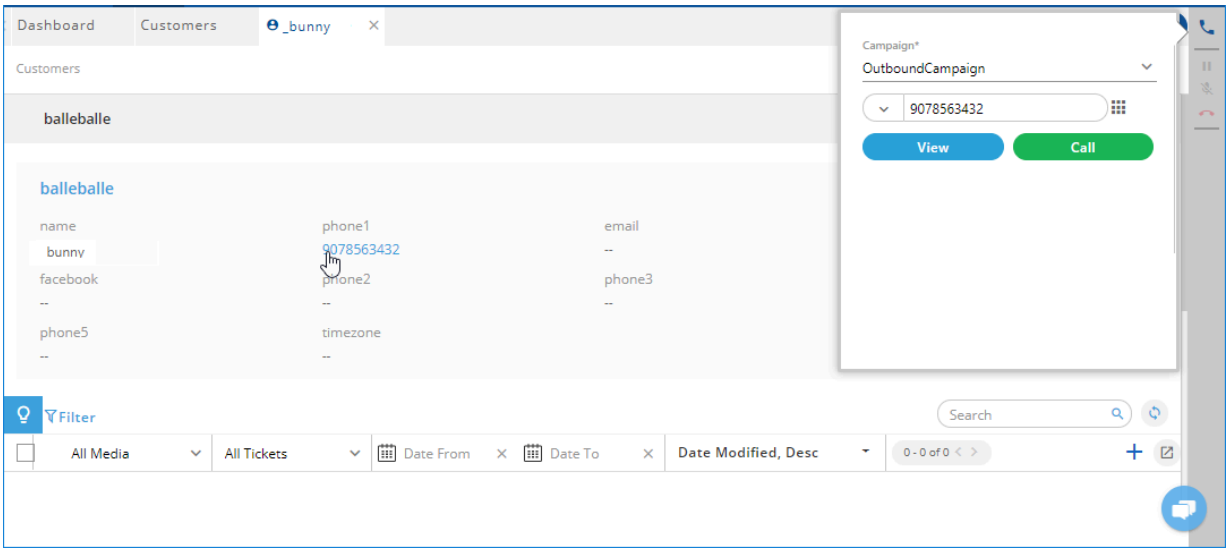


Figure: Calling a Customer through Customer Information

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

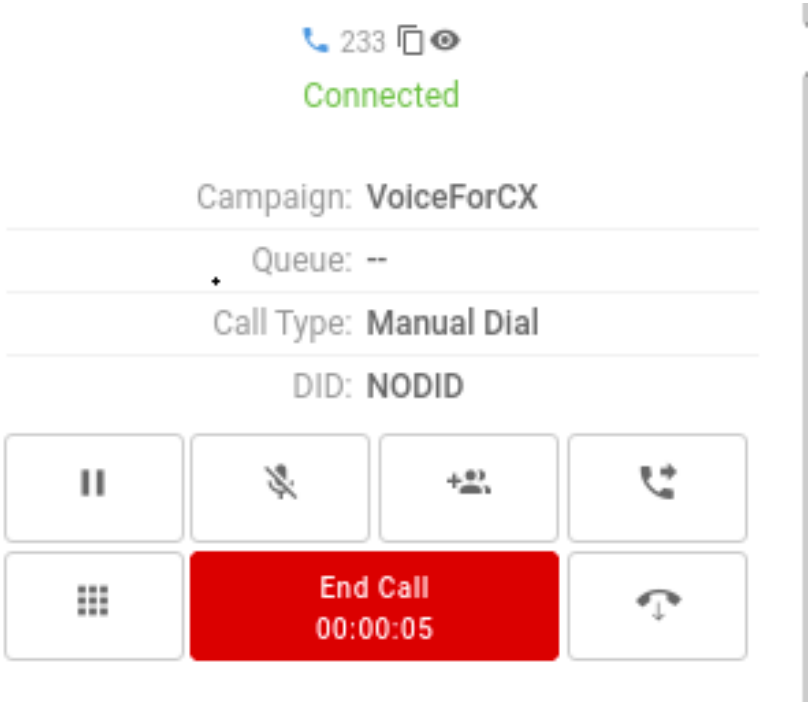


Figure: Calling a Customer

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

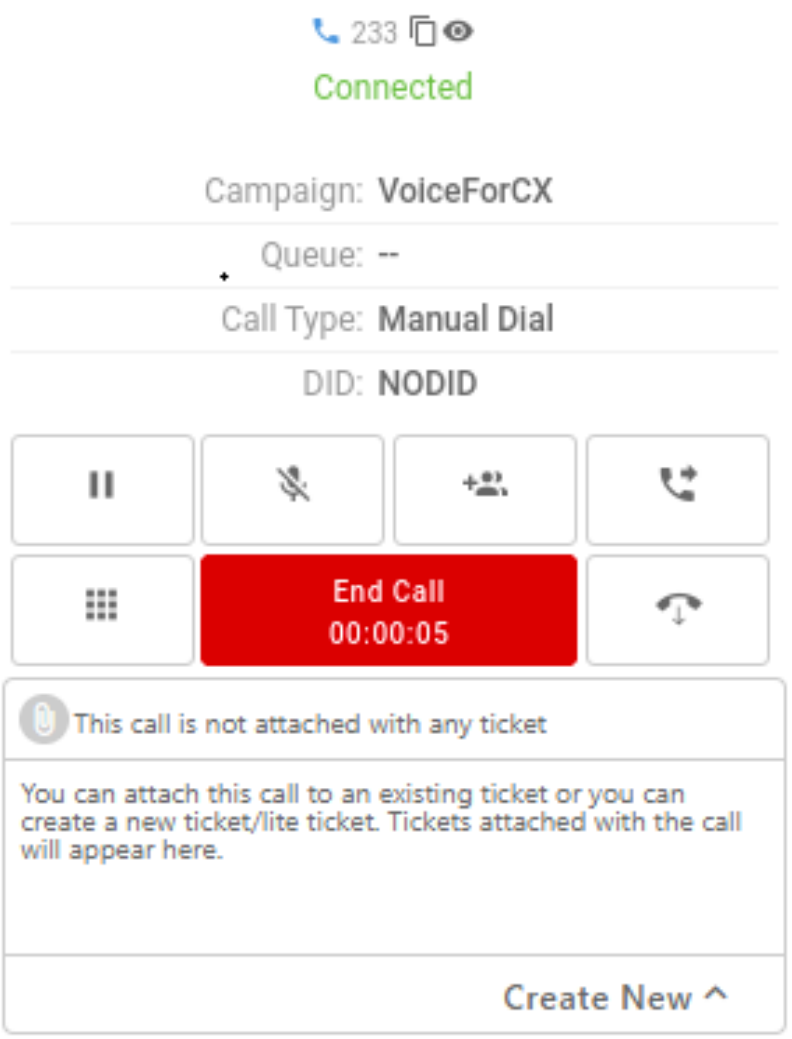


Figure: Ongoing Outbound Call

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

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

Availability of DID Number in Telephony Panel

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

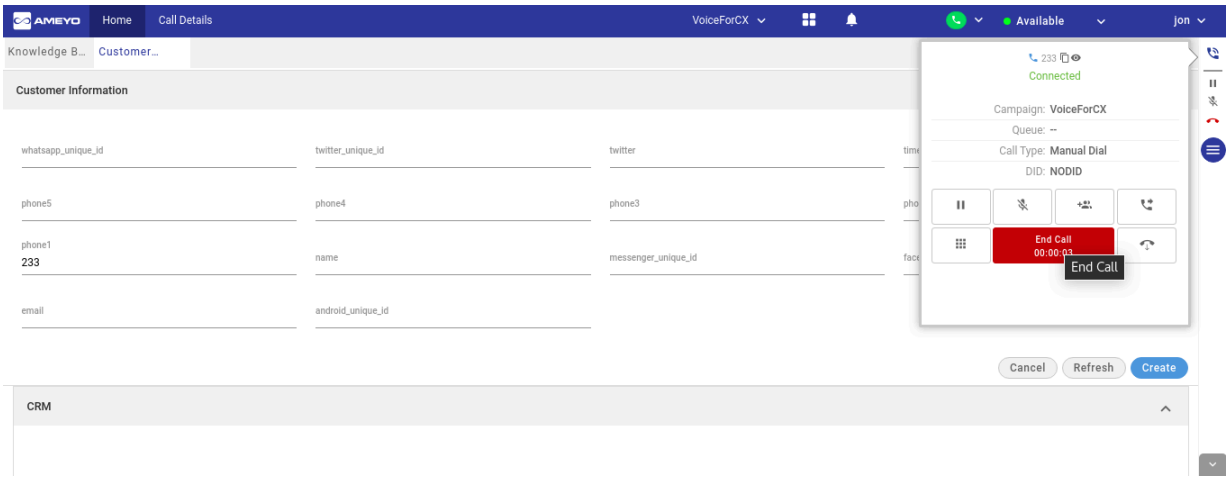


Figure: Caller ID showing for Outbound Calls at Telephony Panel

19.3.6.1.5.1. View Customer Information and Click to Call

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

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

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

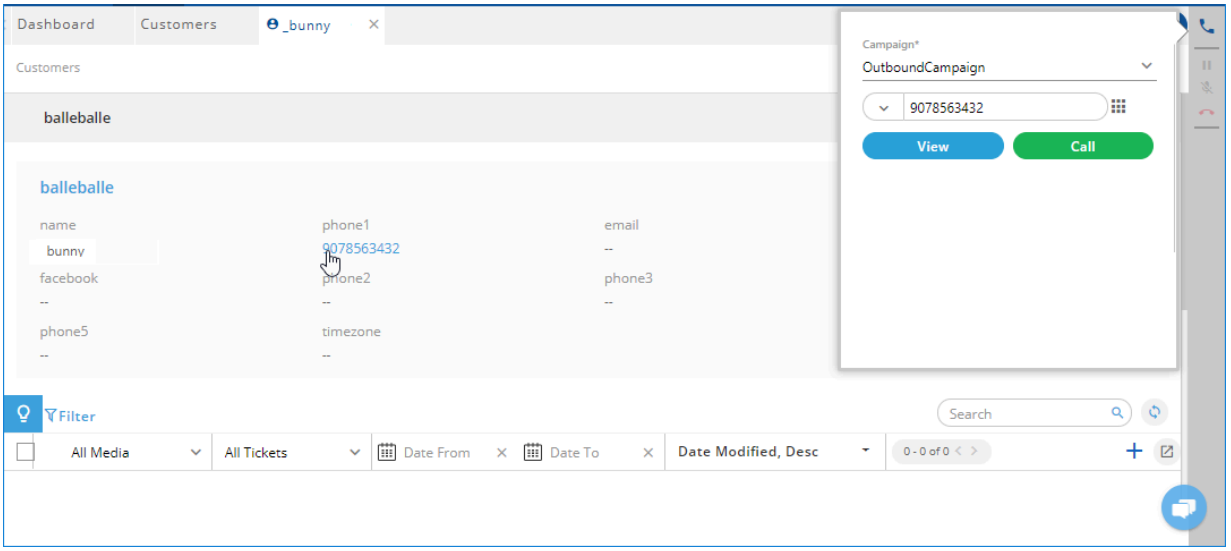


Figure: Calling a Customer through Customer Information

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

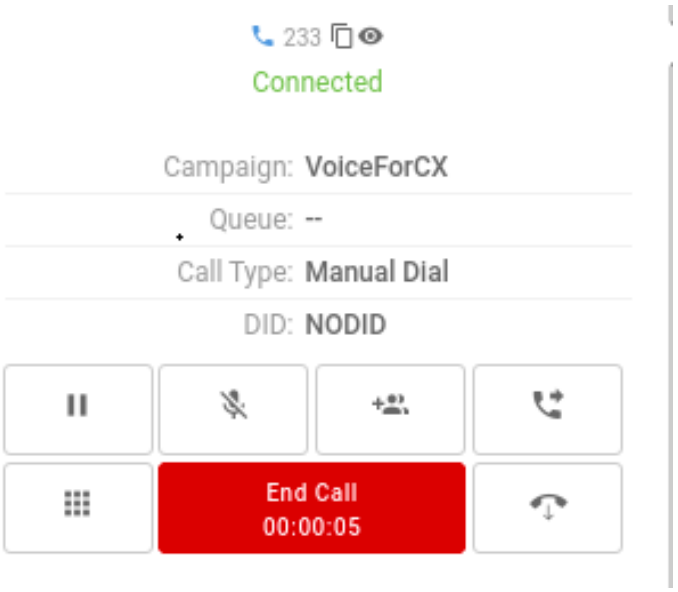


Figure: Calling a Customer

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

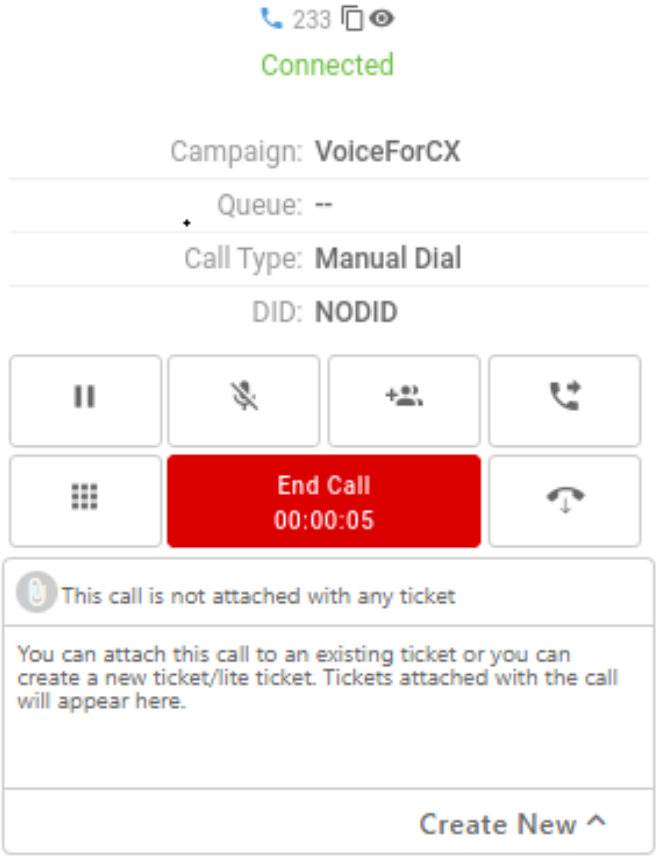


Figure: Ongoing Outbound Call

Now, the Keypad will be replaced with the call control functions

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

6. After the call the agent can dispose the call.

Availability of DID Number in Telephony Panel

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

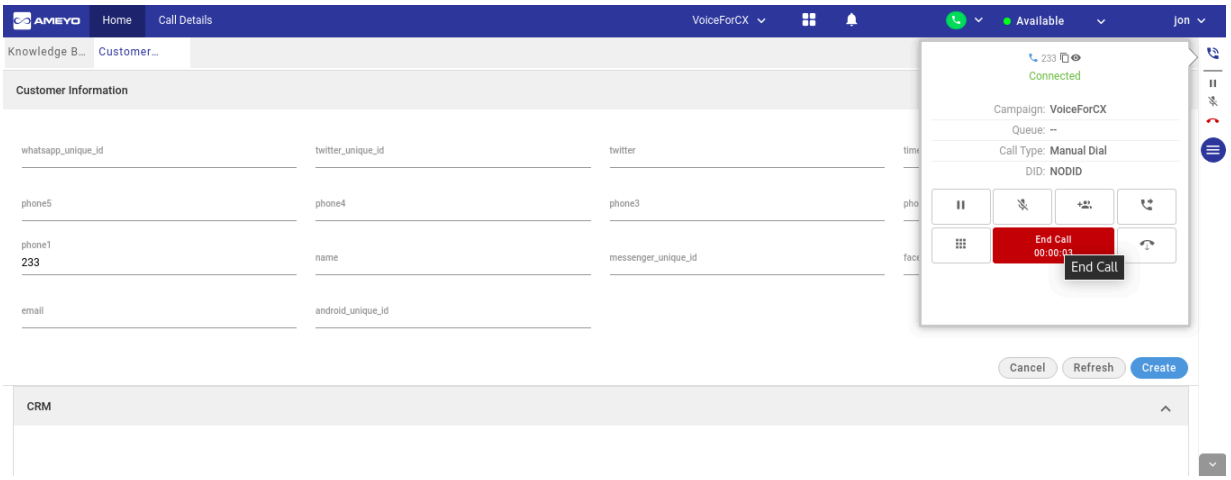


Figure: Caller ID showing for Outbound Calls at Telephony Panel

19.3.6.1.5.2. Make a Manual Dial Call

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

Perform the following steps to make a manual dial call.

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

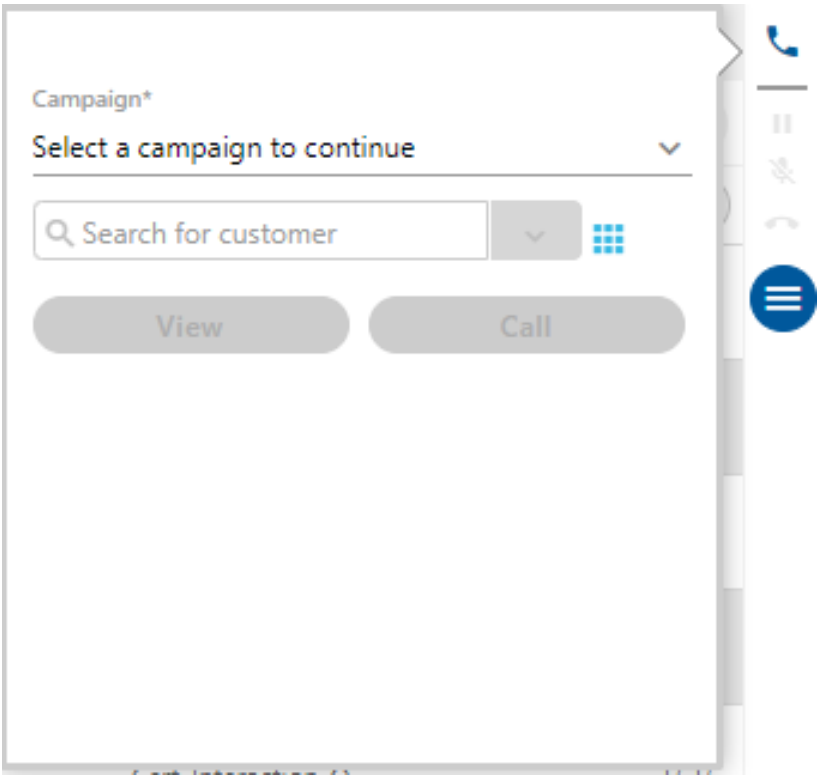


Figure: Manual Dial

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

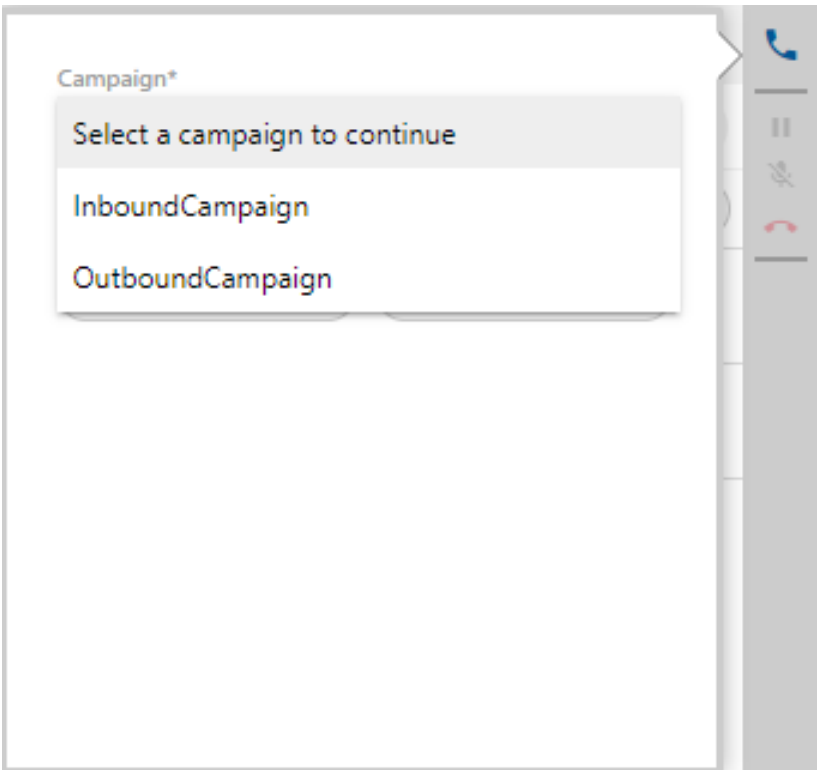


Figure: Campaign Selection

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

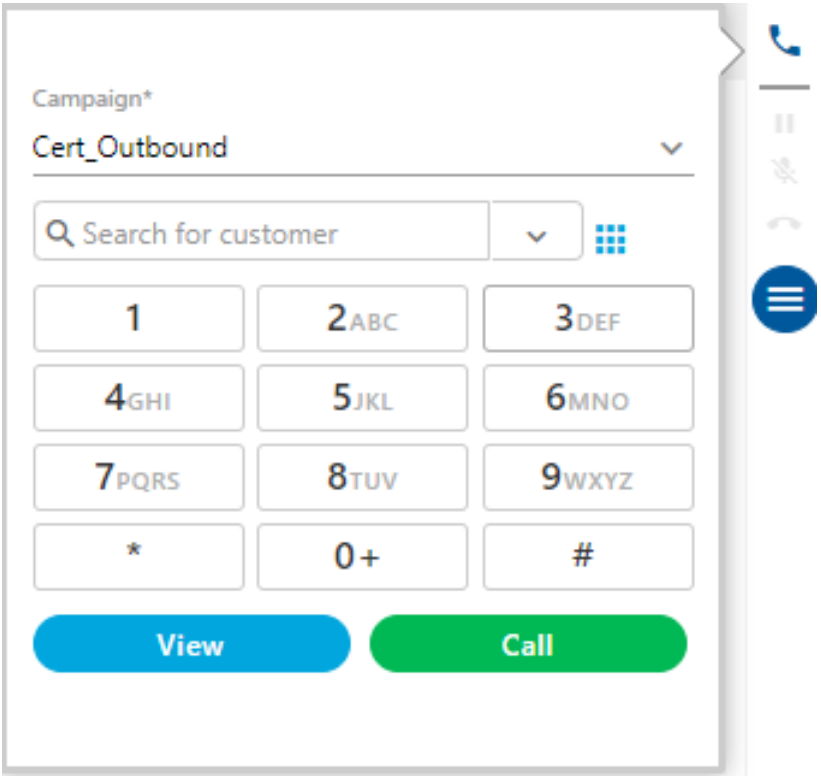


Figure: Numeric Keypad

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

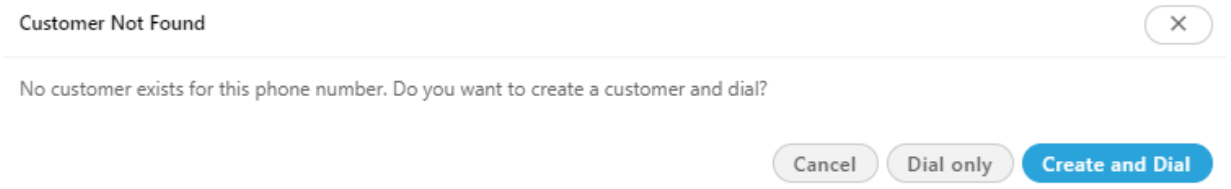


Figure: Calling Manually to a New Number

It contains the following two options.

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

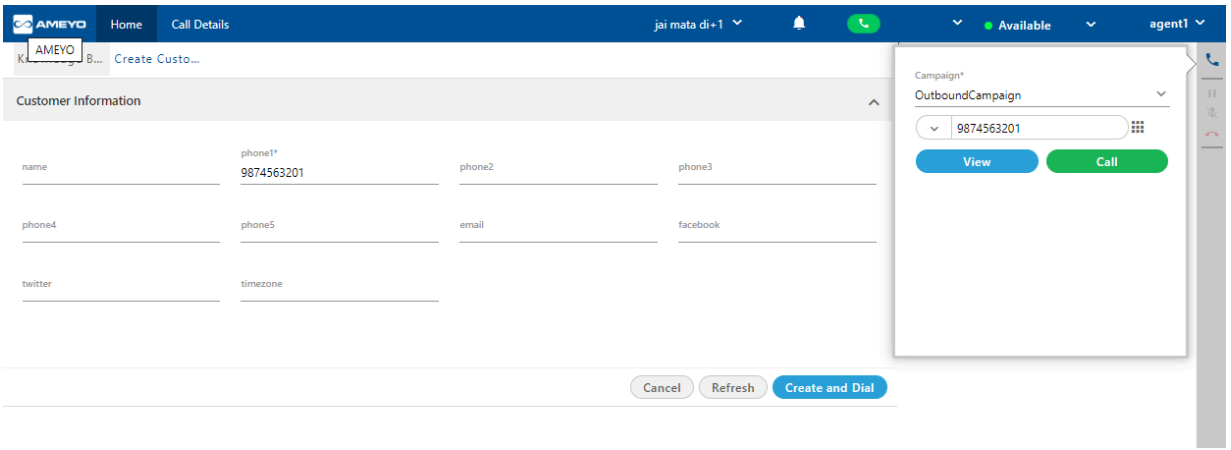


Figure: Create and Dial

Here, you have to provide the following inputs.

- Name
- Phone 2
- Phone 3
- Phone 4
- Phone 5
- Timezone

- Twitter
- Facebook
- Email

- After providing the inputs, click "Create and Dial" to save the customer details and dial the number. Before dialing, you have to select the campaign again.
- **Dial Only:** Click "Dial Only" to dial the call straightaway without saving the number with a new customer.

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

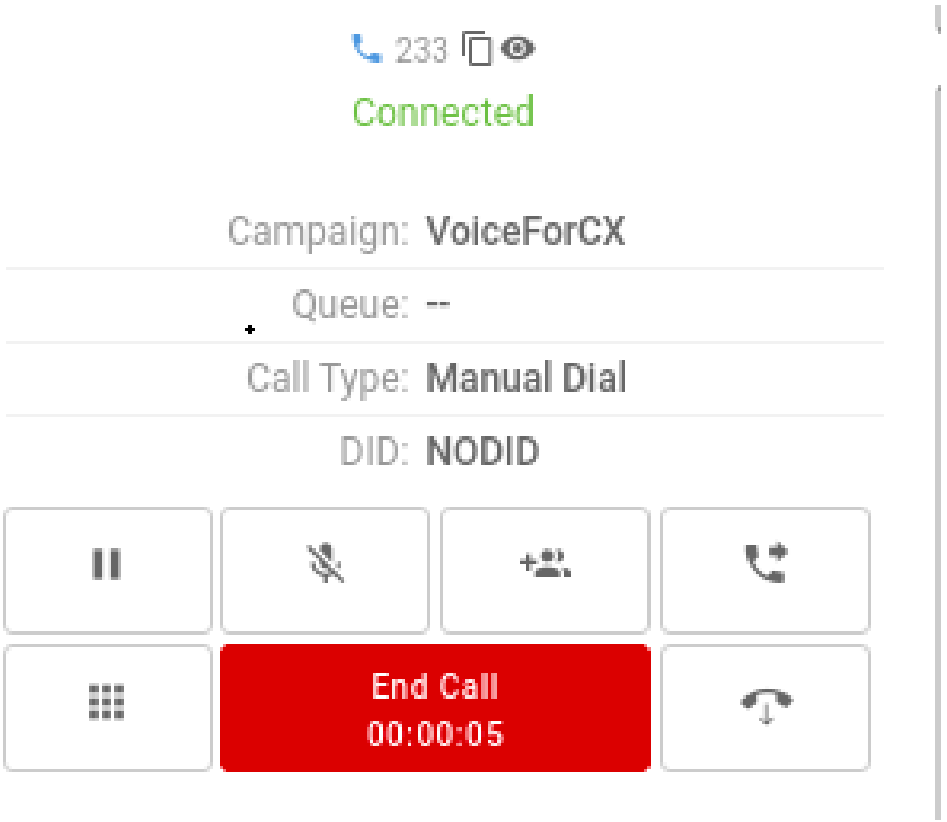


Figure: Calling a Customer

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

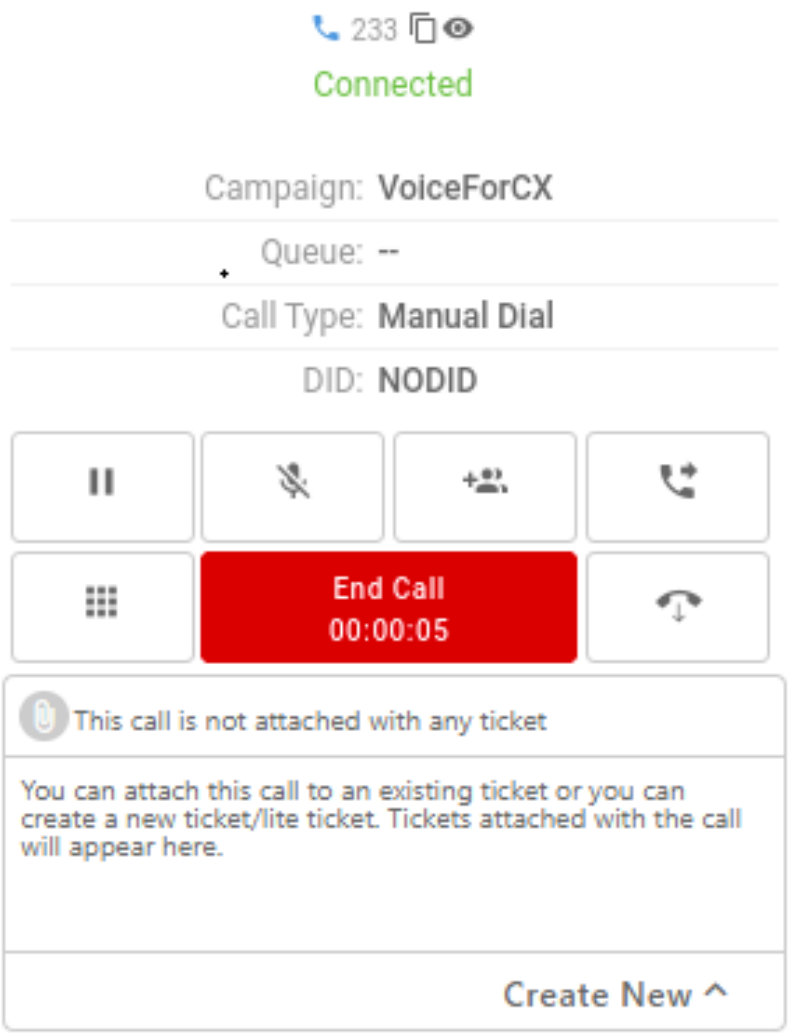


Figure: Ongoing Outbound Call

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

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

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

19.3.6.1.5.3. Preview Manual Dialing

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

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

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

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

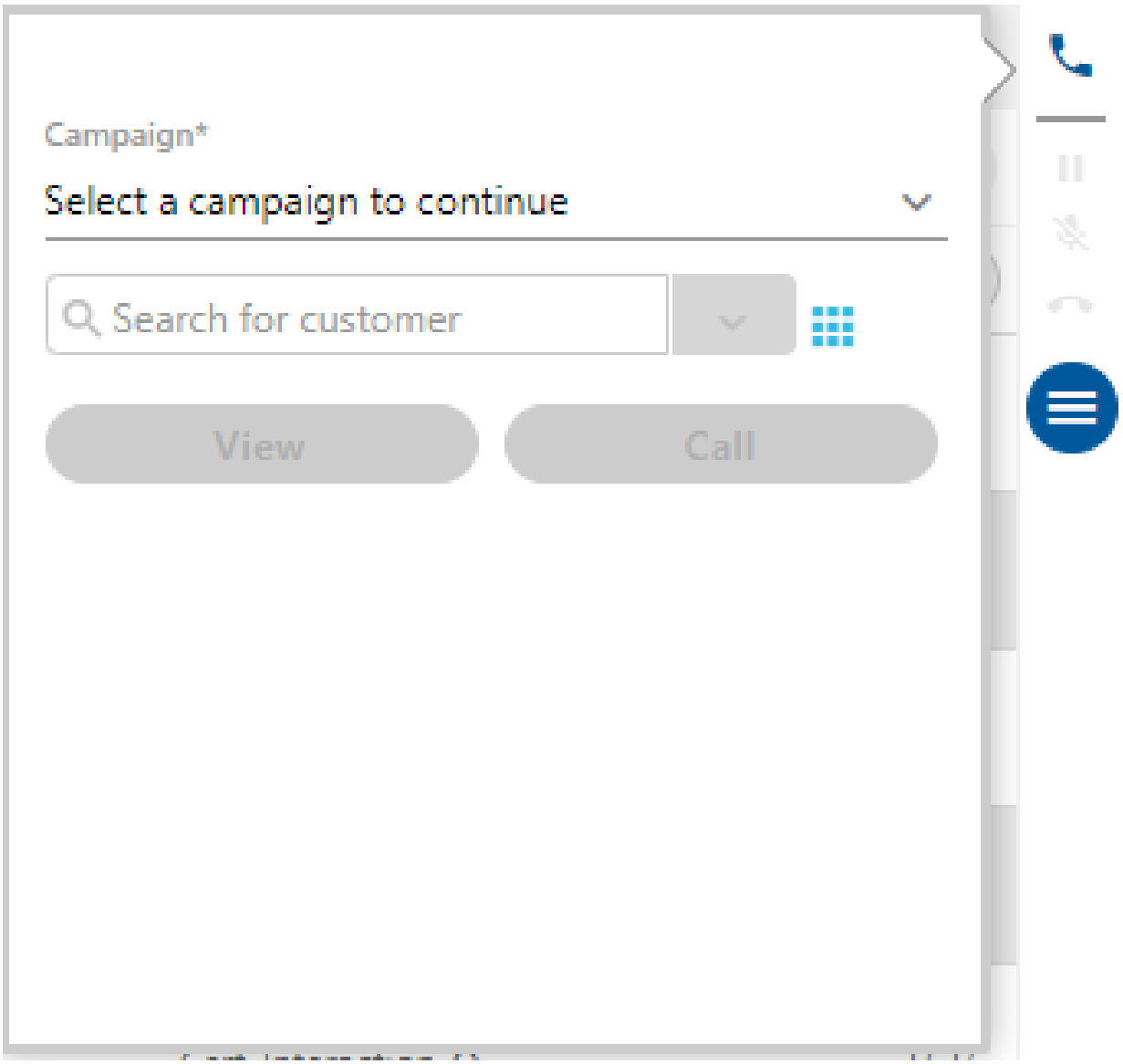
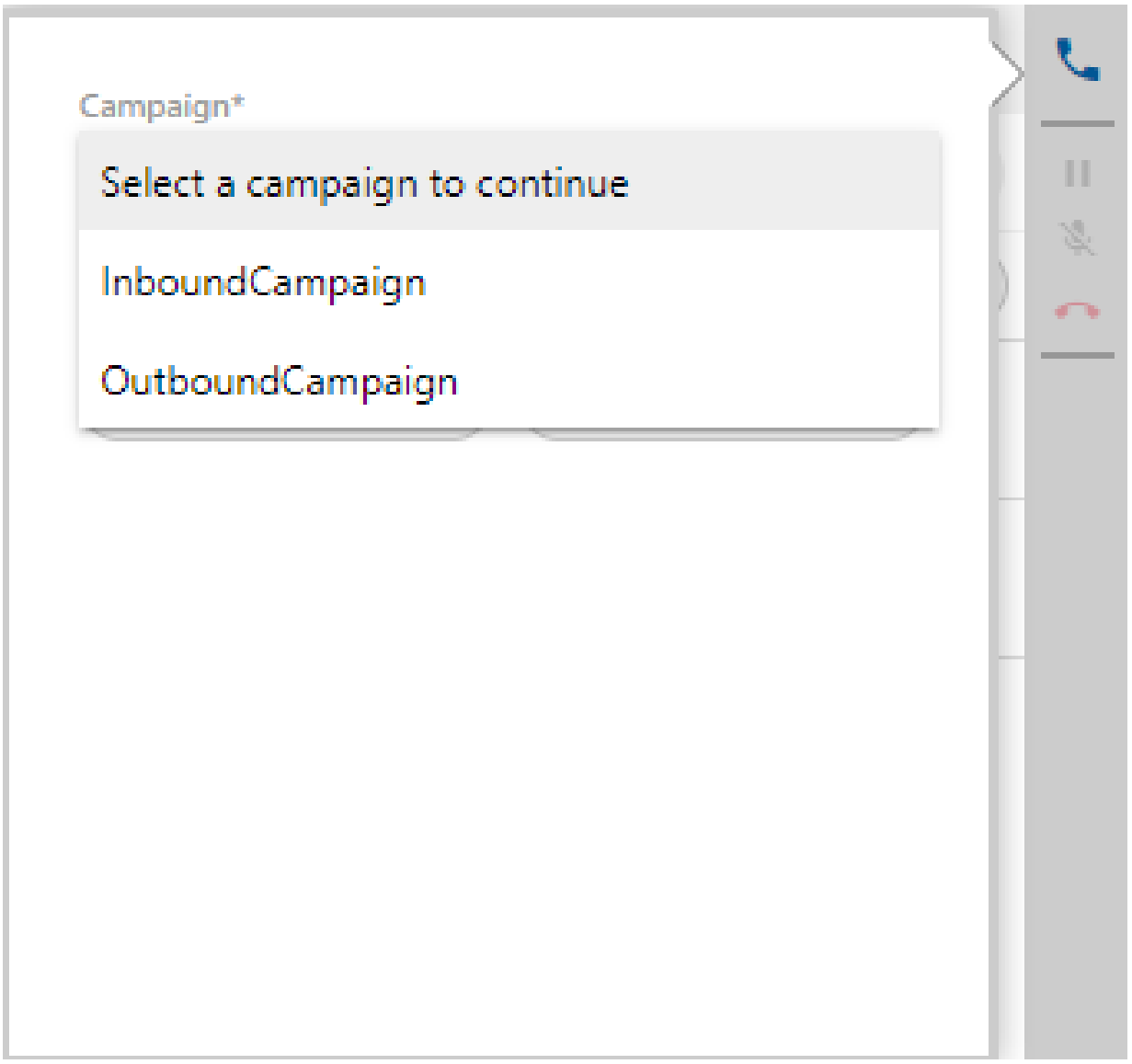


Figure: Manual Dial

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



3. Click icon to show the numeric keypad.

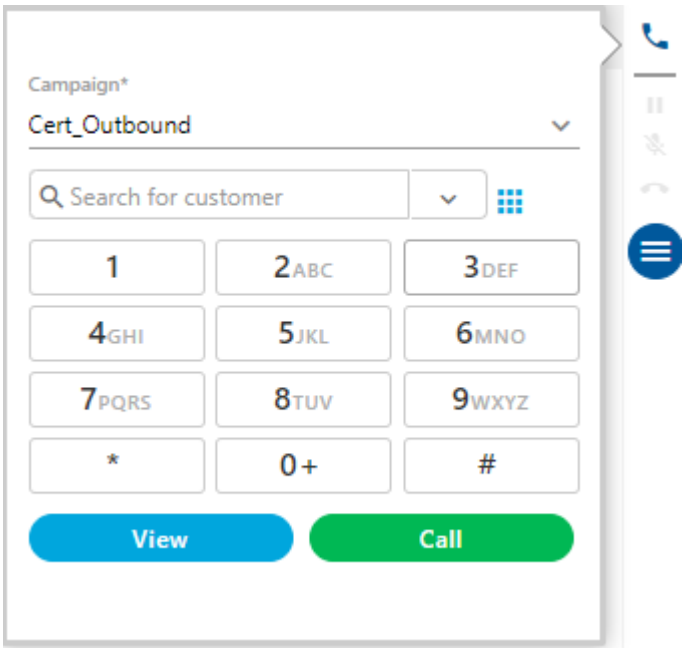


Figure: Numeric Keypad

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

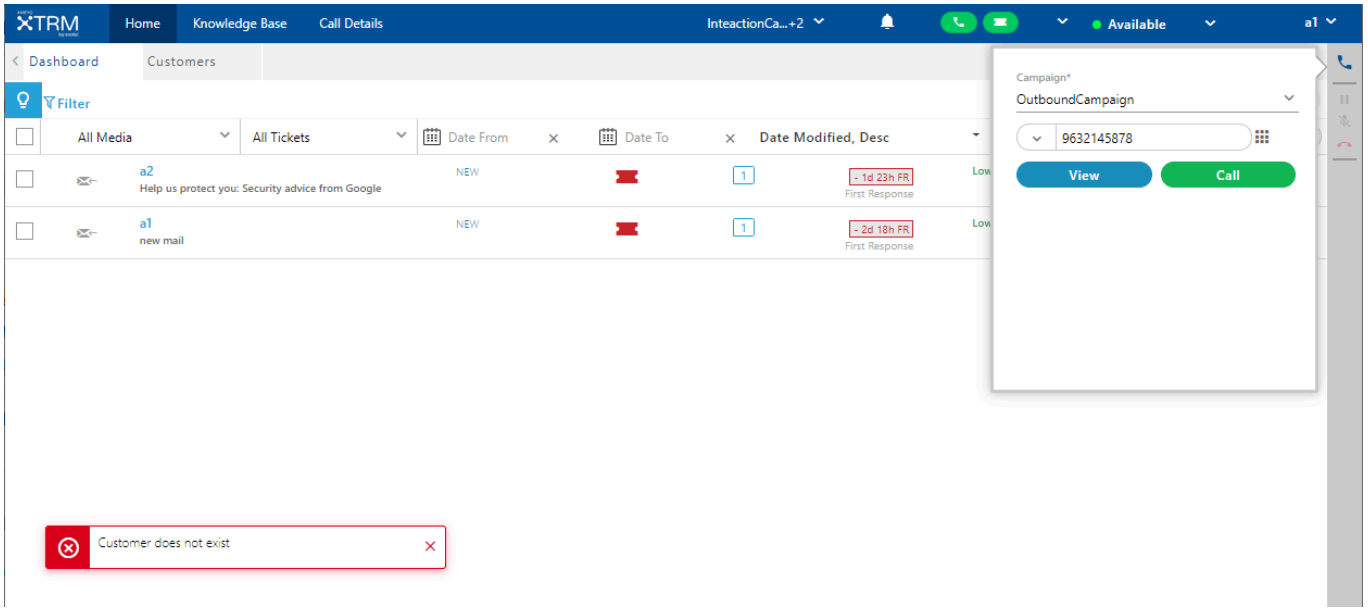


Figure: Customer Does not Exist

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

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

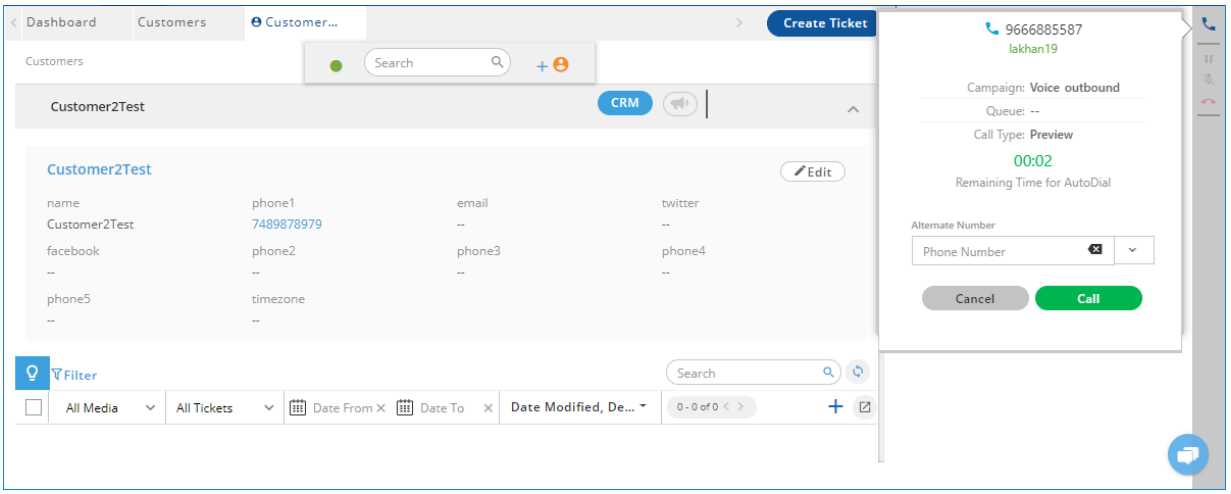


Figure: Showing the Customer

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

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

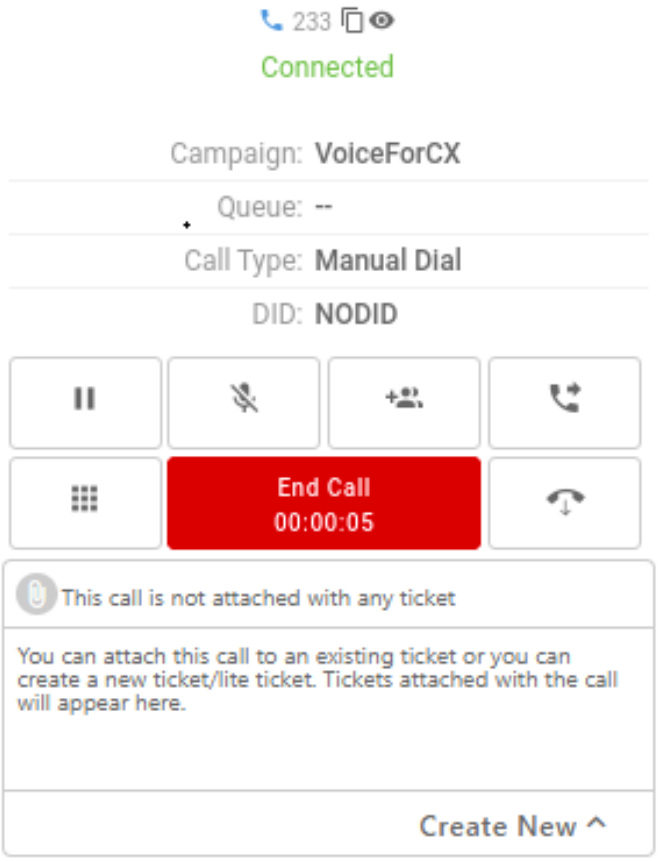


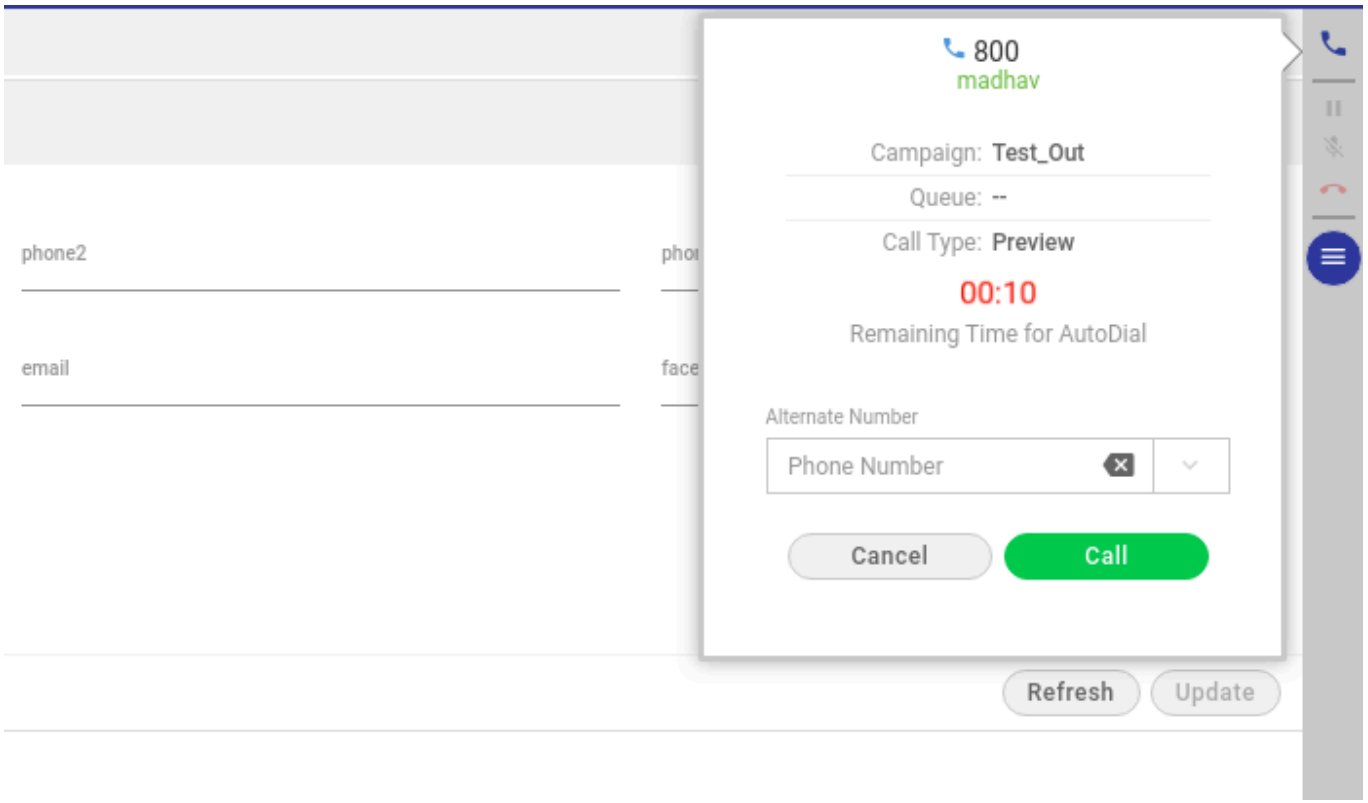
Figure: Calling a Customer

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

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

Added the Animation and Red Color to Call Duration Timer

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



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

19.3.6.1.5.4. Auto Dial

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

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

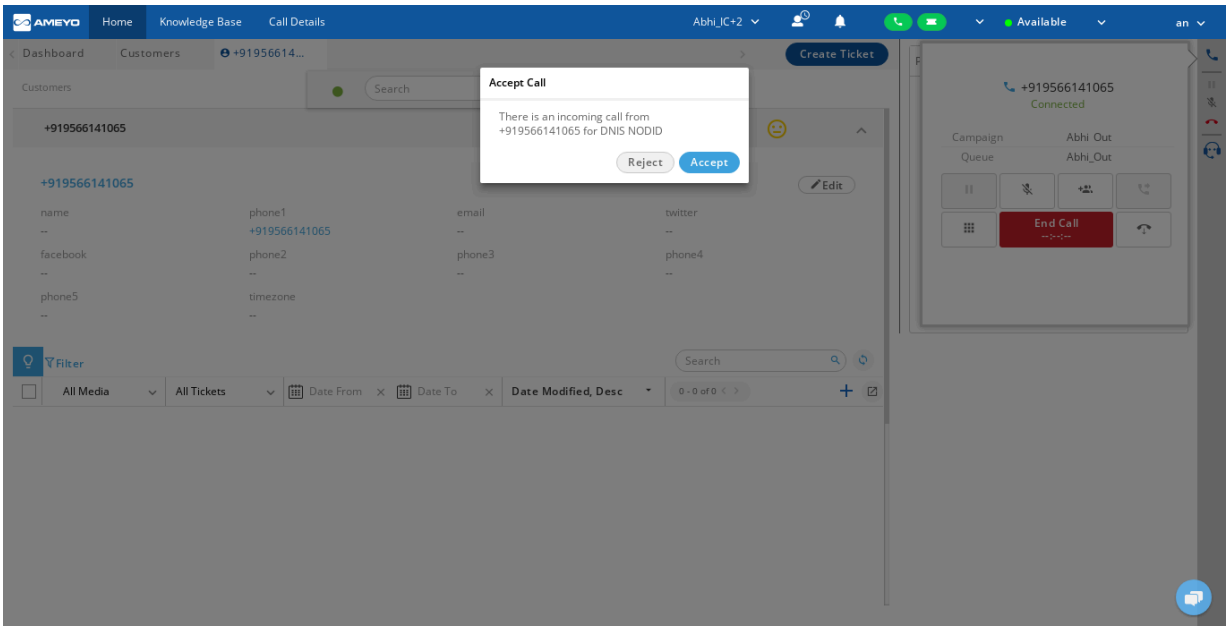


Figure: Outbound Call Sent by the Dialer.

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

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

The agent has to perform the following steps here.

1. Click "Accept" to attend the call.

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

2. The call is connected. In case of "Progressive Dialing", the agent has to wait until the customer is connected. However in case of "Preview Dialing", the customer is already

connected with the dialer and then the call is given to the agent, so the agent can start talking with the customer.

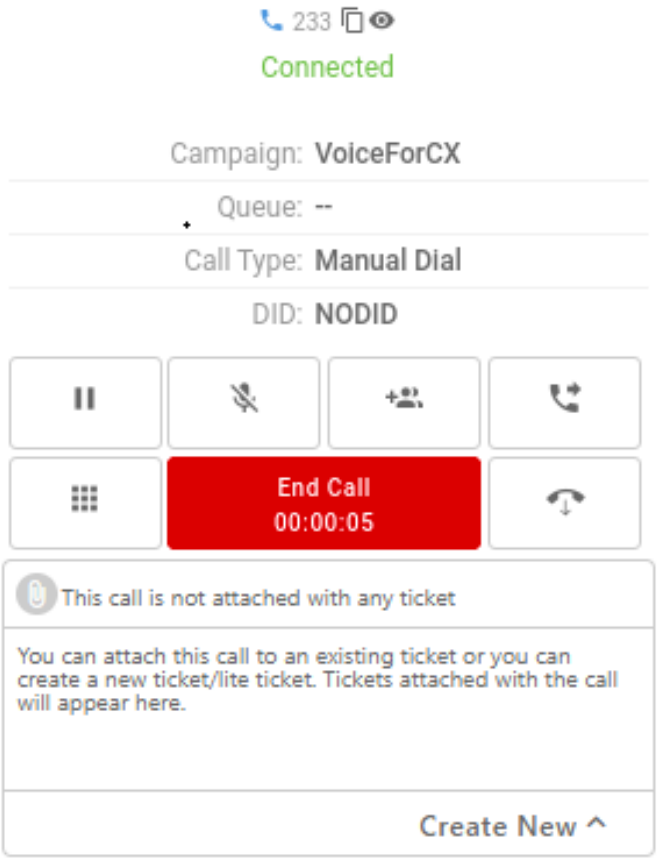


Figure: Calling a Customer

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

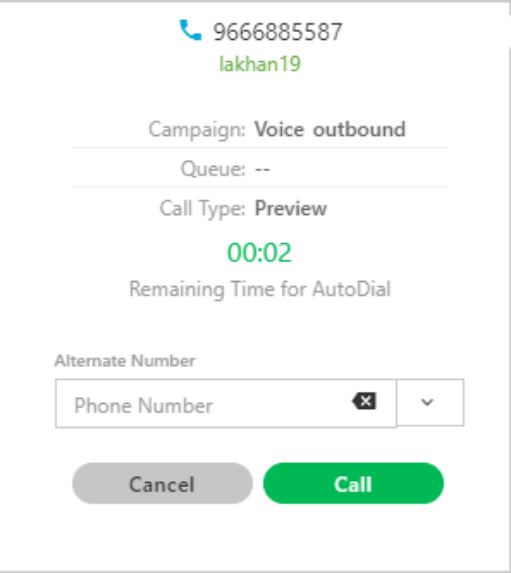


Figure: Preview Time

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

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

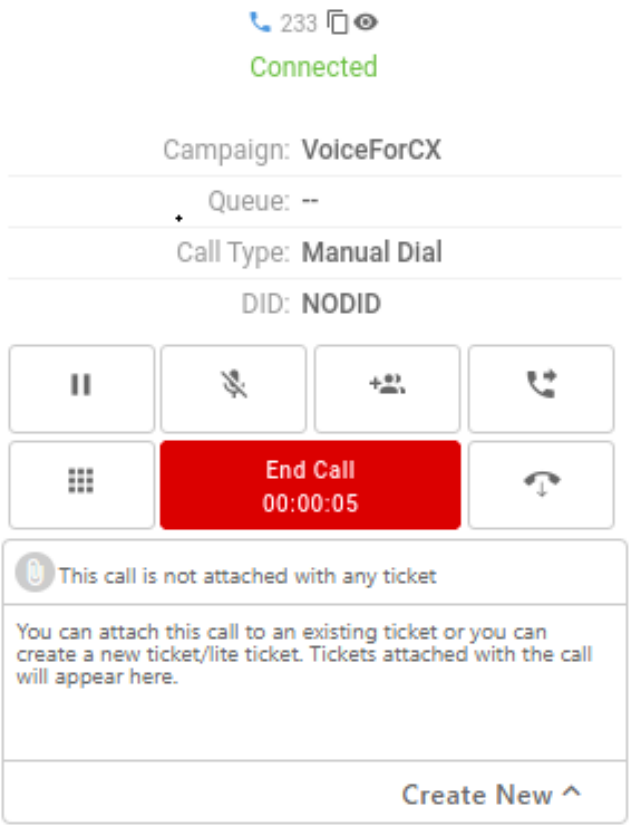
Related topics

- **Outbound Call Context Policies** – Administrator-facing reference for **outbound call context determination** (which customer voice path is used per dial, failover and retry behavior at campaign and flow level).

19.3.6.1.6. Call Control Functions

> All the functionalities of Call Control Functions for supervisor and group manager are similar as that of agent.

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



Ownership of the Call

Ownership of the call is synonymous with control of the call. The agent that dials out the call, or originally receives an incoming call, is the original owner of the call. The person with the ownership of the call, can perform the following telephony actions:

1. Transfer the ownership to another agent, also called call transfer.
2. End the call, which will disconnect all parties in the call, even in a conference.
3. Remove selected parties from the call, in case of a conference call.

Attach Tickets to Call

The User can create and attach the tickets during the call in Telephony Panel.

Call Hold/Talk

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

The agent can unhold(resume) the call by clicking  button.

Call Mute

On the live calls, the agent can put the customer's call on mute by clicking  button. When the call is on mute, then customer is not able to hear the voice of agent, but agent can hear all the voices of customer.

The agent can resume the muted call by clicking the same button again.

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.

Suppose, agent(1) is on the call with customer(1). Agent(1) adds agent(2) to the call. In this case, agent(1) remains the owner of the call.

(Licensable) Confer a Call to a User or Supervisor

If the agent wishes to make a conference call to another user or supervisor, the agent may take the user or supervisor over conference call by using this confer option. If you want to see the complete list of the users, then ask about the same from your administrator, as this feature is licensable.

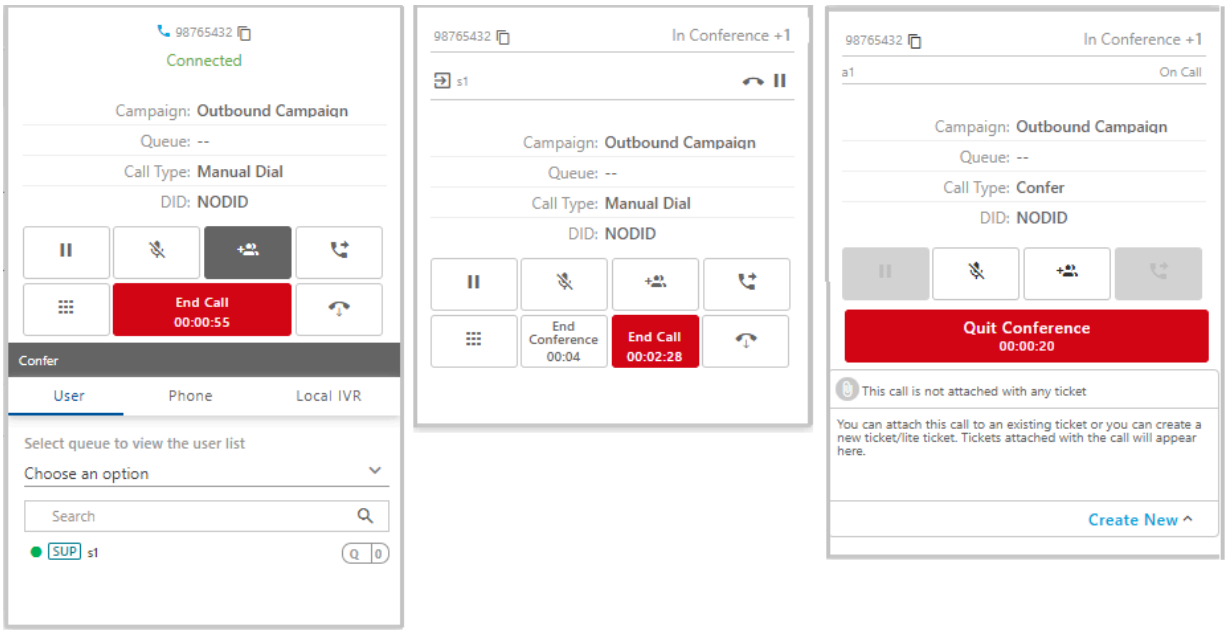


Figure: Call Conferencing with User

1. Only the names of the logged in users will reflect, who are available to take the calls with their User role. The user role will be seen only for the supervisors.
2. Put the customer call on hold by clicking **"HOLD"** button and click **“CONFER”** button.
3. Agent can select the name of the person with whom he/she wants to confer a call from the "user" list. During this process, the customer call would be on hold.
4. Agent can unhold the customer by clicking **“UNHOLD”** button and it will be a three-way conference call with new agent and the caller.
5. Since the first/primary agent is the owner of the call, the agent can disconnect conference call by clicking **“End Conference”** button.
6. **The agent can give the ownership to the other user while on the conference call by clicking button. The primary agent can come out of the call by disposing the call. In this case, since the ownership is transferred to the second agent, the call does not end when the first agent hangs up.**
7. The primary agent can remove the added user from the conference call by clicking button.
8. The conference button also shows the total duration of the call for which the call has been on conference.

Confer a Call to an External Number

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

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

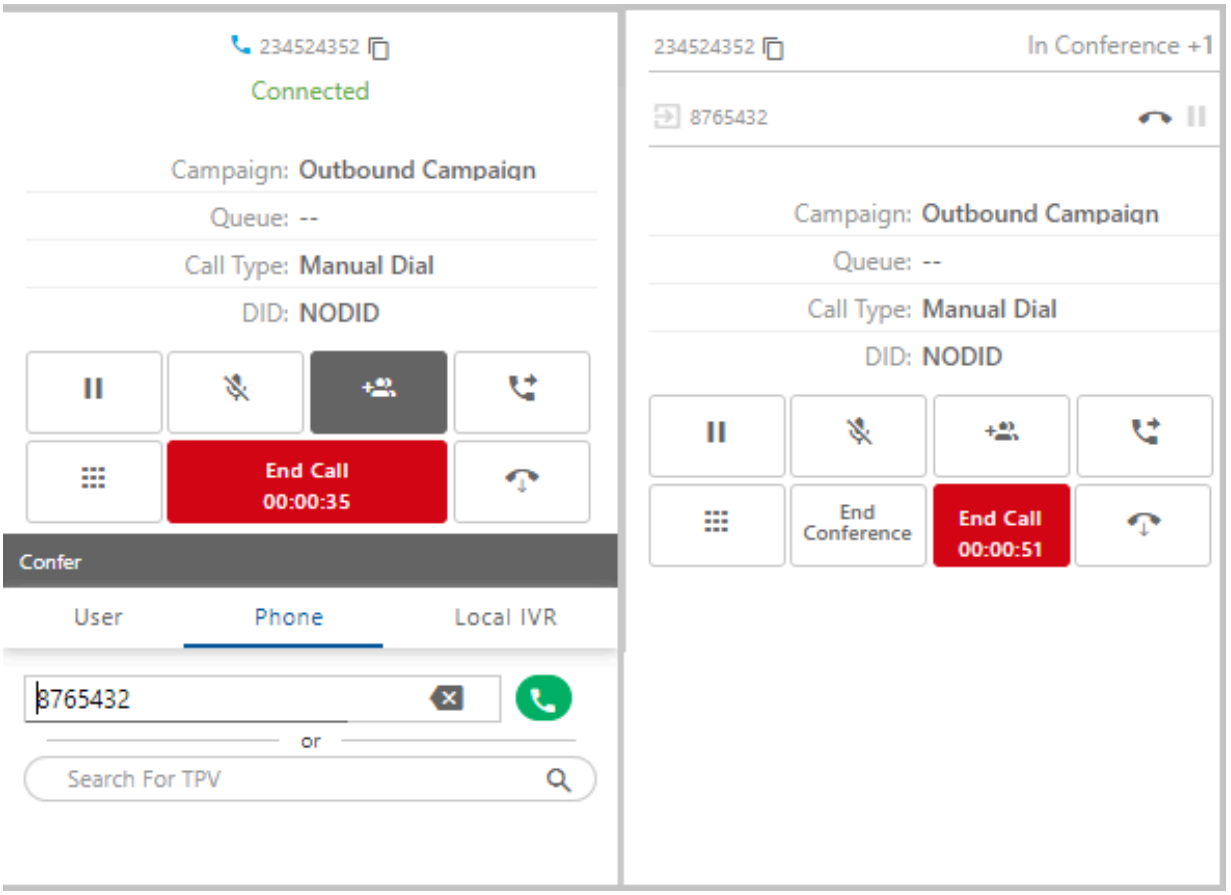


Figure: Call Conferencing with External Number

Confer a Call to IVR

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

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

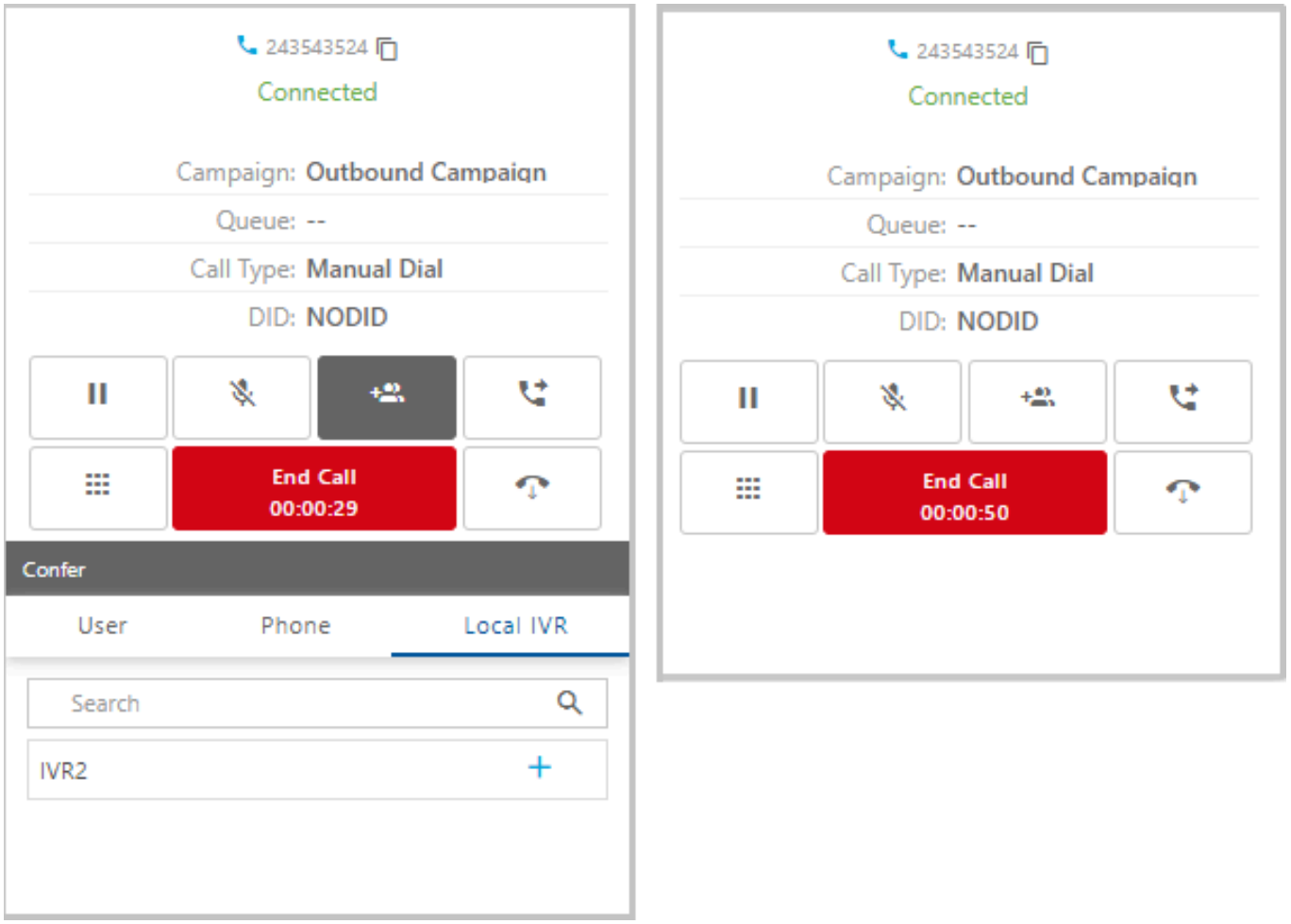


Figure: Call Conferencing with Local IVR

> The agent cannot transfer the call to the IVR; however the call can be conferenced to the IVR by agent.

Call Transfer

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

Suppose, agent(1) is in the call with customer(1). Agent(1) transfers the call to agent(2). In this case, the ownership of the call is transferred to the agent(2).

The agent will be able to select from the multiple options for call transfer.

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

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

A warm transfer is when agent will transfer the customer call to another agent or supervisor by giving him/her some background information about the caller. If you want to see the complete list of the users, then ask about the same from your administrator, as this feature is licensable.

For transferring the call to external user follow the below steps:

1. Only the names of the logged in users will reflect, who are available to take the calls.
2. Agent will put the customer call on hold by clicking on **"HOLD"** button and then click on **"TRANSFER"** button. However, the agent can directly transfer the call without making the customer on hold, but it is not recommended to do so.
3. Agent can choose anyone of the user from the available list. While transferring the call, the agent can see the user role of the supervisor, so that the supervisor can be easily recognized by the agent. Once call is connected to new user, agent can give the customer details (required information) to the new user. During this process, customer call is on hold.
4. New user will unhold the call by clicking on the “UNHOLD” button and it will be a three-way conference call with new user, the caller and agent himself.
5. Agent can hang up from the conference call by clicking on the “End Call” button. The caller will then be on call with the new user.

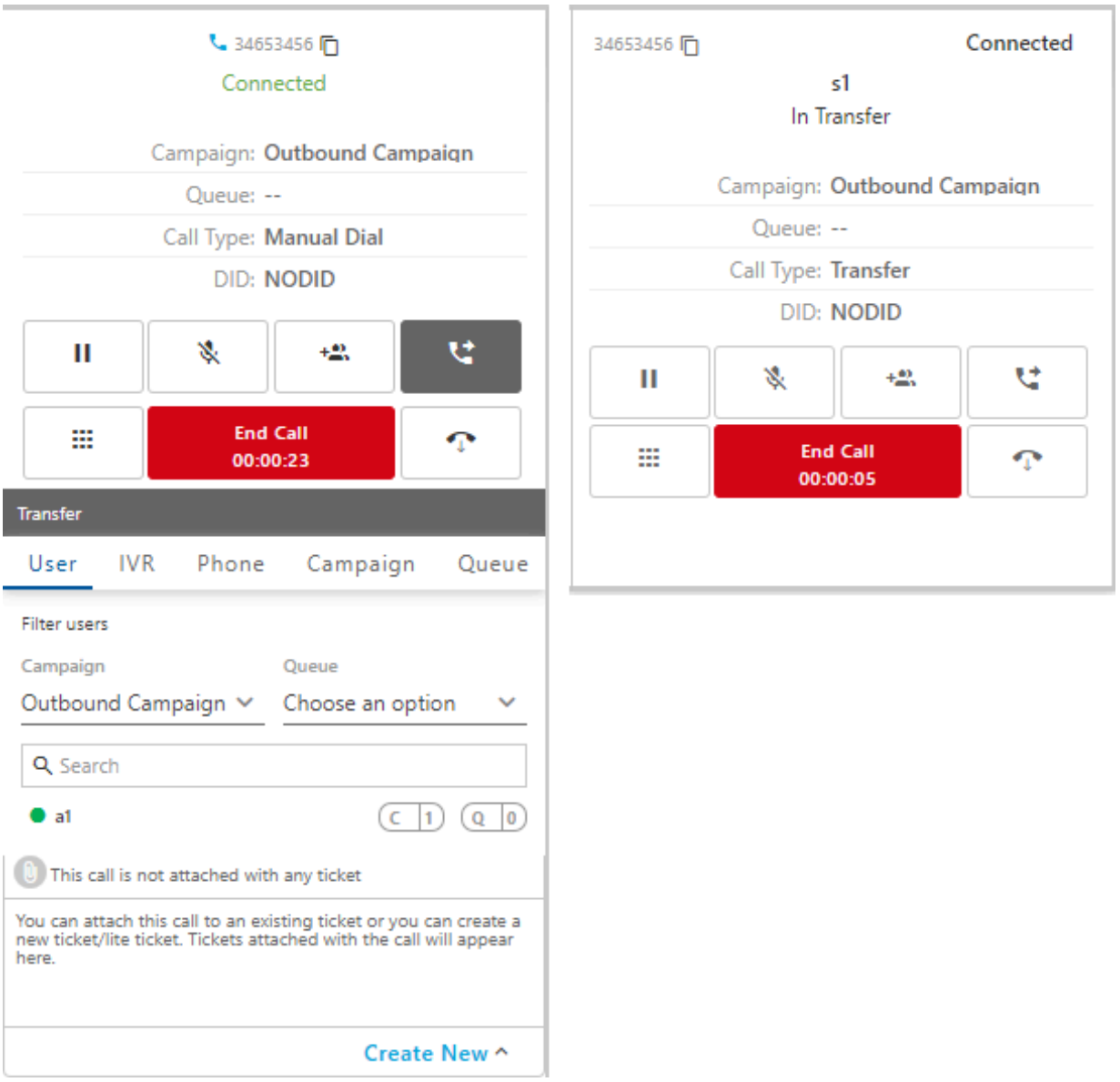


Figure: Call Transfer to User

Exceptional case:

When an agent performs "Transfer to User" for an outbound call and transfers it to another user, then the Call Type for such a call is not available in Live Monitoring tab. For example, agent 1 has received a call and then transferred it to agent 2. In this case, the customer will be reflecting with the agent 1 rather than the agent 2. The supervisor will see that the customer is connected with agent 1.

Transfer a call to external number (Warm Transfer)

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

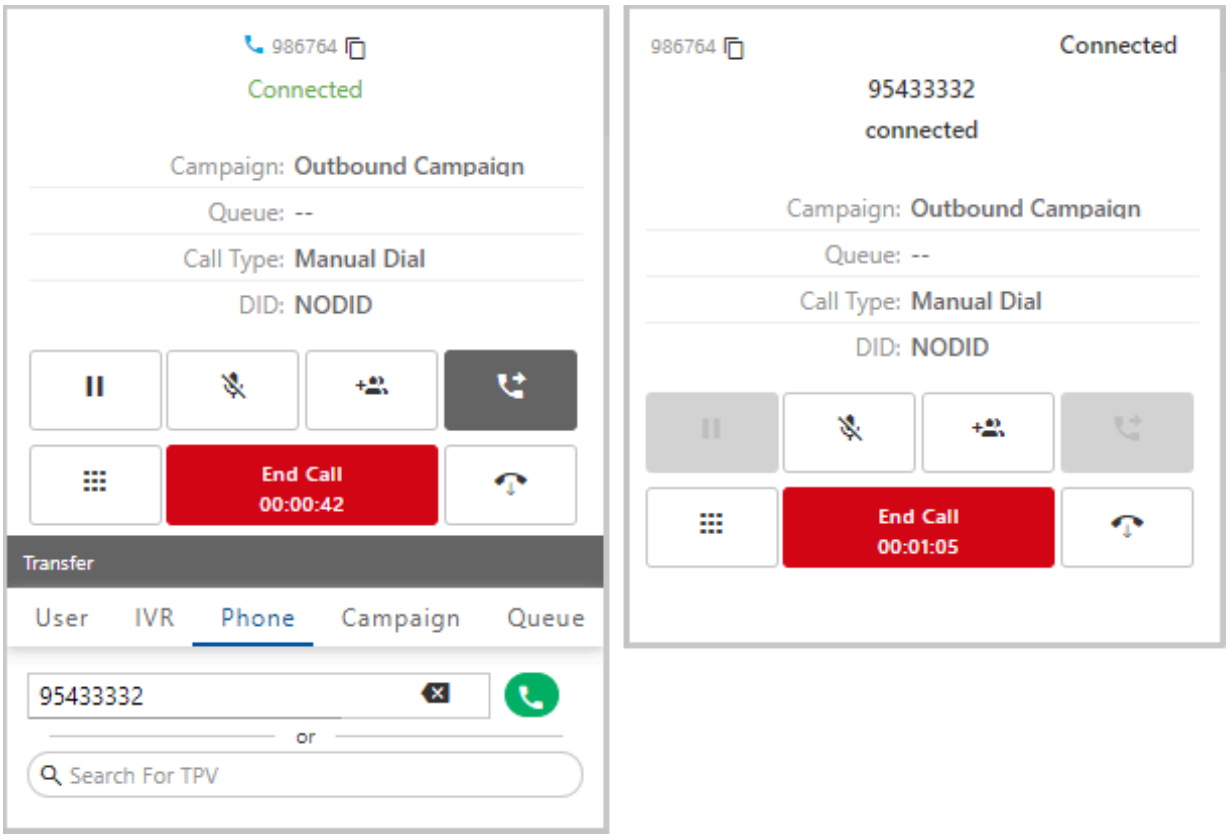


Figure: Call Transfer to External

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

Transfer a Call to IVR

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

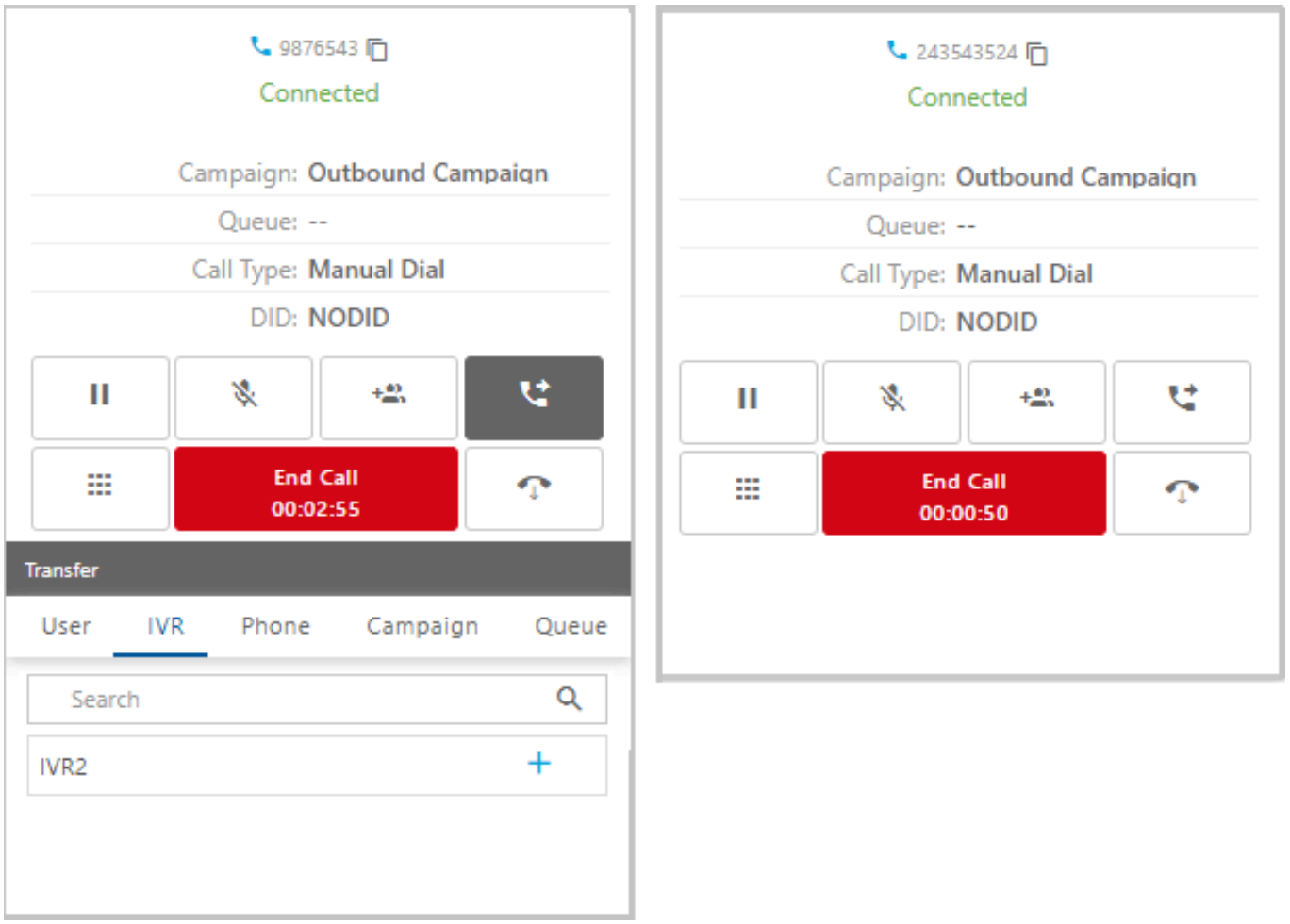


Figure: Call Transfer to IVR

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

Transfer a call to Campaign

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

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

Transfer a call to another Queue (of same campaign)

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

1. **"HOLD"** button and then click on **"TRANSFER"** button.
2. The Agent needs to select the queue name from the drop-down list and select the appropriate queue in which the call needs to be transferred.

> If the supervisor has configured "ACW Timeout (in sec)" for Connected and Not Connected Calls, then the calls (after disconnection) will be disposed off automatically after the expiry of this timeout value. To avoid such scenario, and in general, we recommend to dispose of the disconnected calls within this duration.

Transfer a Call to User of Another Campaign

There are cases, when the call of the customer is get connected in the wrong campaign. In this case, the agent may wants to transfer the call to a particular agent of another campaign. This feature is based upon the normal Warm transfer case, where the user1 who has transferred the call to the user2 present in another campaign will not disconnect from the call. Then user1 can provide the context to the new user "User2" about the call and query, in the meantime, the customer is on hold. The user1 has to perform the following steps to transfer the call to the new user.

1. Click "Transfer" button to transfer the call.
2. Select "User" to search for the user to whom the call has to be transferred.
3. Select the campaign name and queue name from the respective drop-down lists.
4. The new agent can be searched either with "User Name", or "User ID". Here, the count of campaigns and queues in which the user is assigned is also shown in front of the user's name.

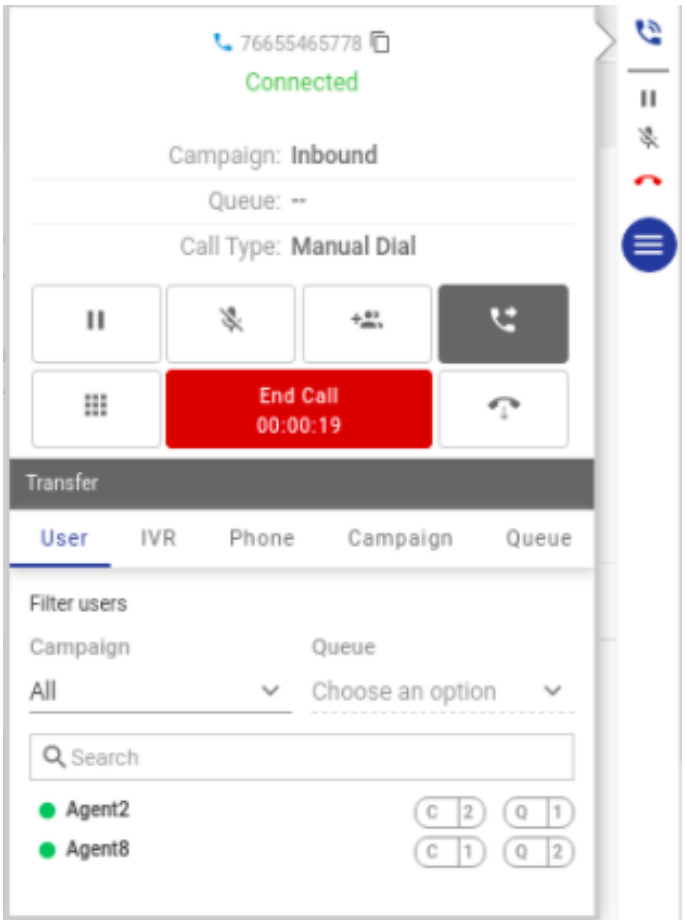


Figure: Searching the user for Transfer

5. A modal will be shown after selecting the agent, in which the list of all the campaigns is present. The agent can select in which campaign the call needs to be transferred.

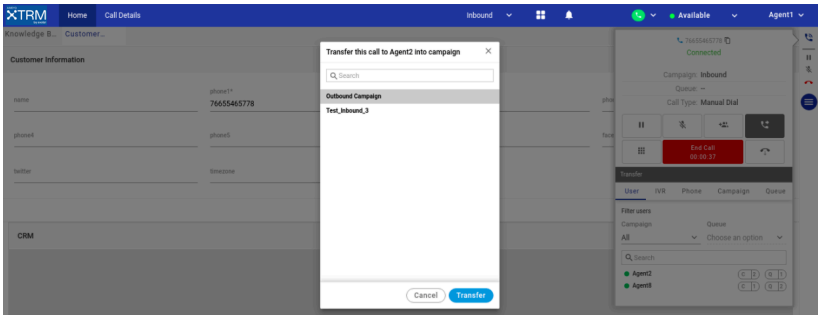
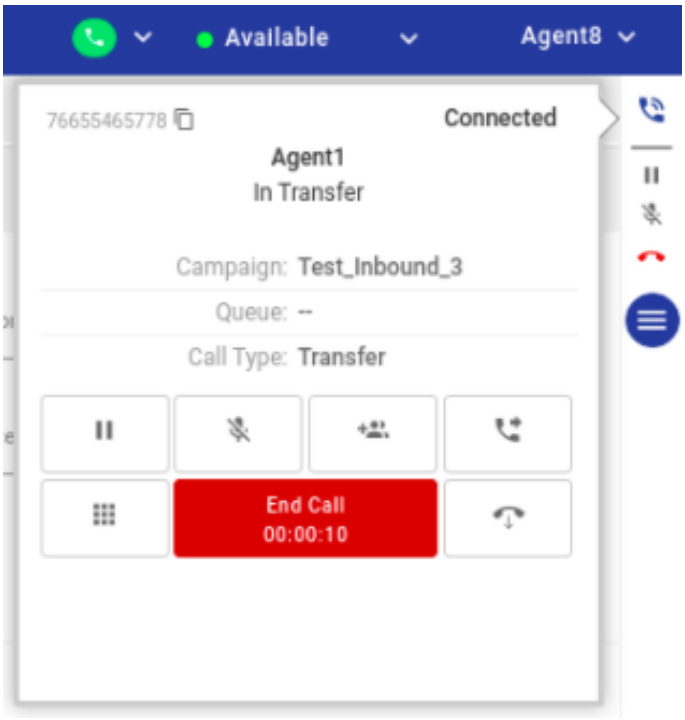


Figure: List of Campaigns and Queues in which the User is loggedin

6. Now, the agent can select and click "Transfer" button to transfer the call to the new user.



If the selected user is busy with another call, or the user is not available, then a toast notification will be shown to the agent notifying about the same.

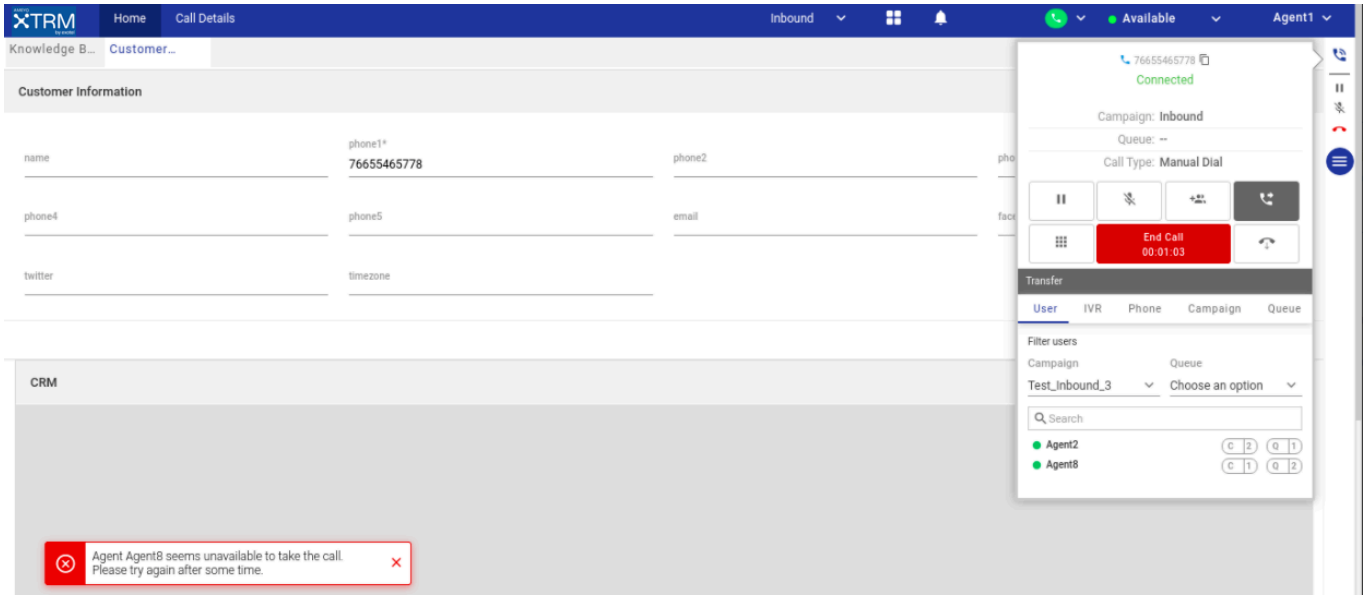


Figure: Notification when the User is not available to take the call

Add Notes

The agent can add the notes during or after the call. Enter your note in the "Add note" textbox of the telephony panel. If you want to provide the note during the call, then click the disposition button and then enter the note. Once you dispose the call, the note will automatically be saved and can be seen on the call details page.

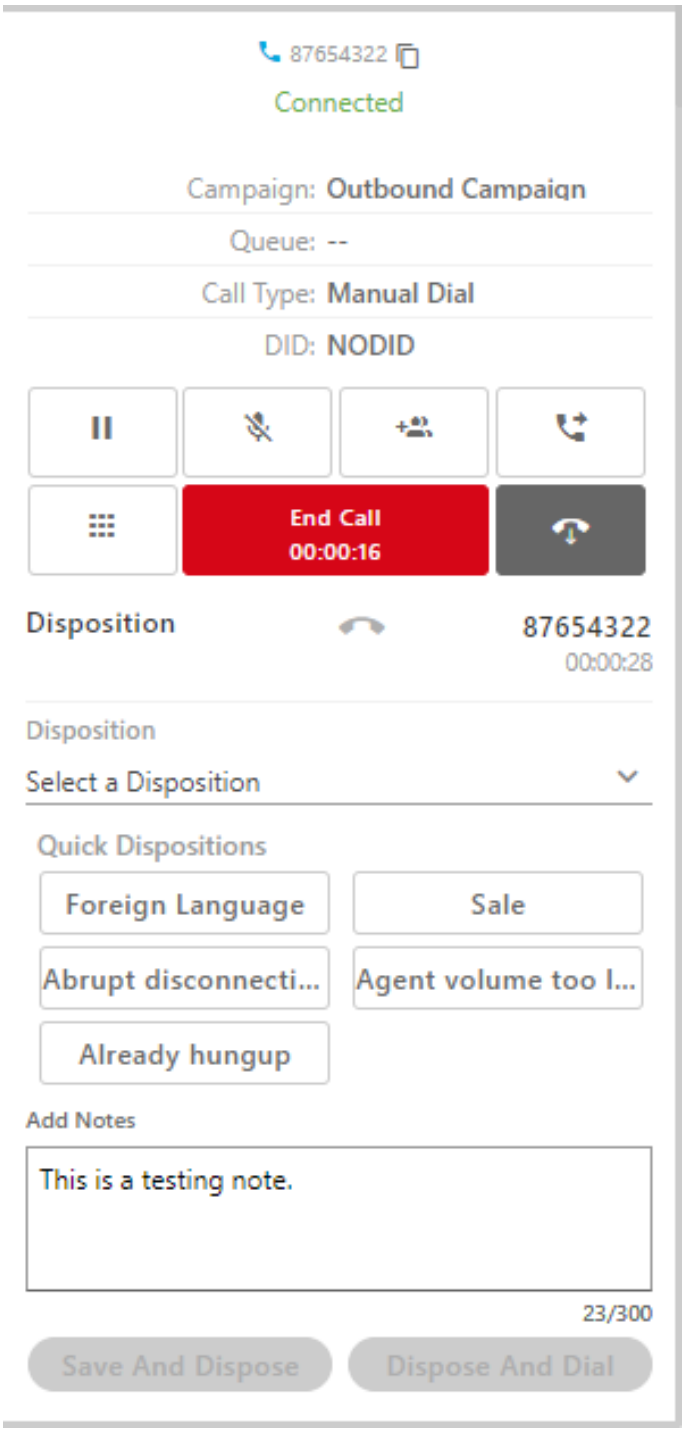


Figure: Adding the Call Note During the Call

Call Disposition

After completing the call, the two-level call dispositions in two drop-downs are displayed in the telephony panel.

The agent has to select the dispositions through the drop-down menus or select any of the on-screen displayed quick dispositions, as no disposition is selected there by-default. Until the agent do not select the disposition, the "Dispose" button remains unavailable to click.

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

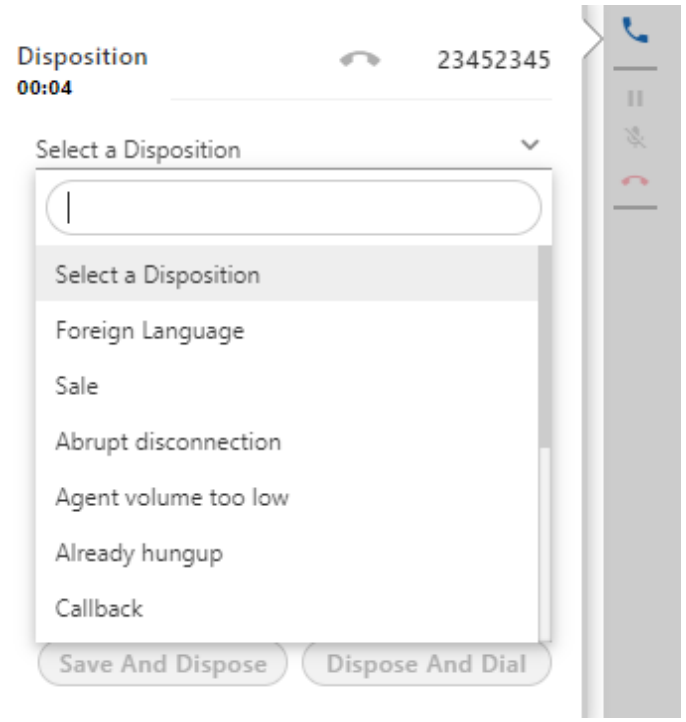


Figure: Single Level Disposition

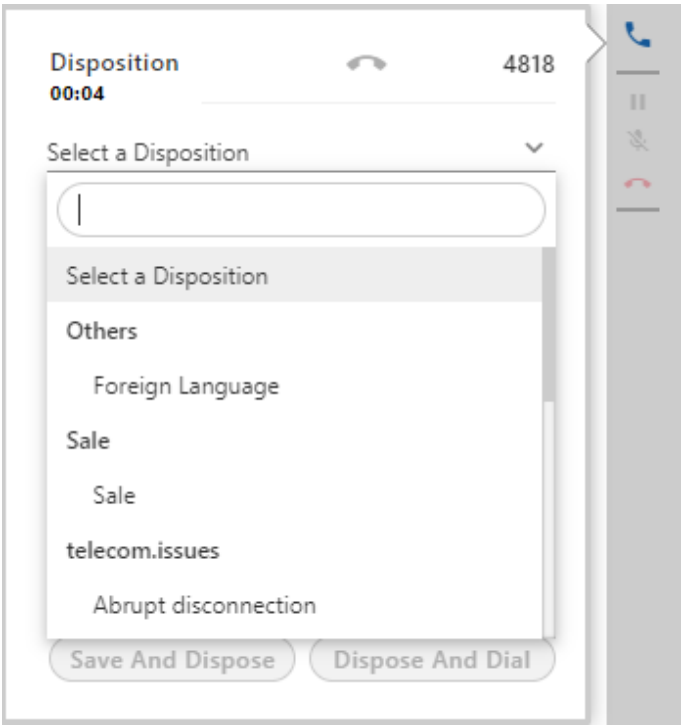


Figure: Two level Disposition Selection

It contains the following two option of buttons.

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

- **(Licensable) Dispose and Dial:** Click it to dispose the current call ticket and continue to make a manual dial call. It shows a textbox at the bottom of telephony panel.

> It is a licensable feature, so contact your administrator about the license of the same.

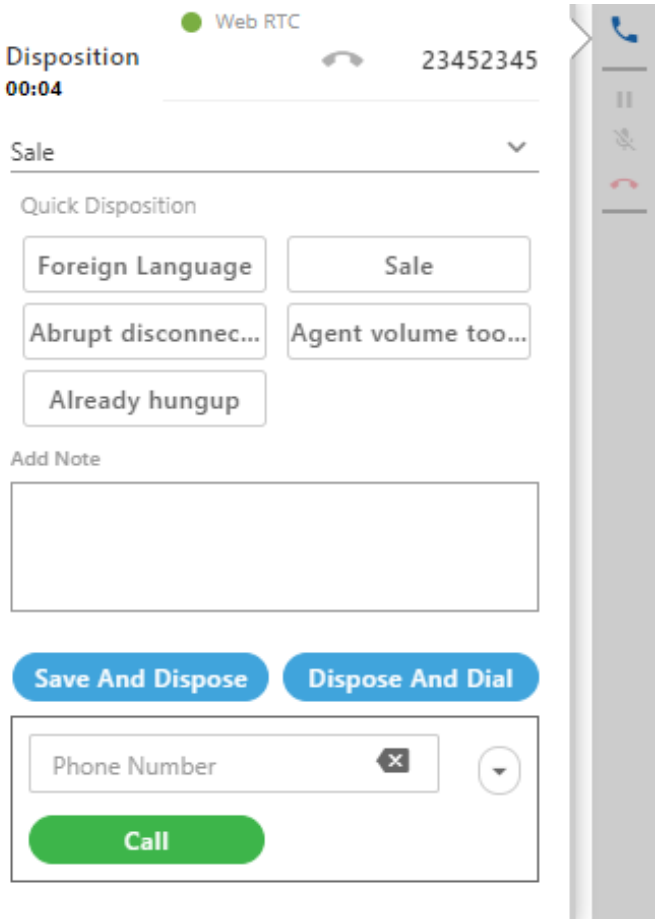


Figure: Continue to Manual Dial after Disposing Current Call

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

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

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

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

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

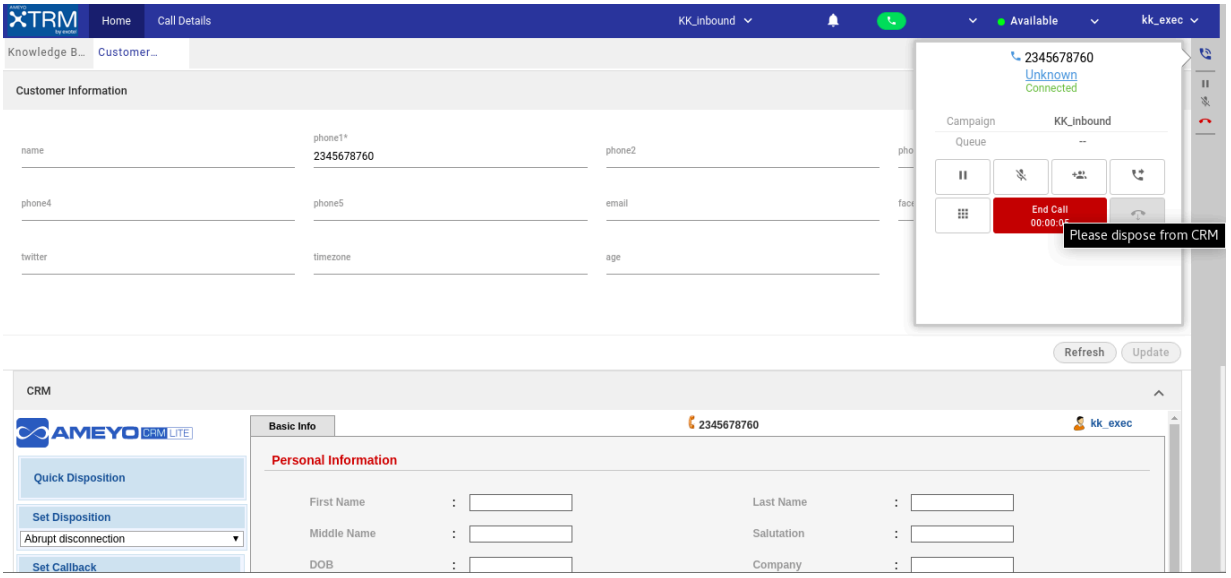


Figure: Disposition of Call is disabled in Telephony Panel

If the disposition is restricted at the telephony panel but can be done at CRM, then the "ACW Timer" is displayed in the tooltip of the phone icon in the right panel after the call disconnection (since the telephony panel is not shown to the agent). When the agent disposes of the call from the CRM, then an inline message is displayed on the page.

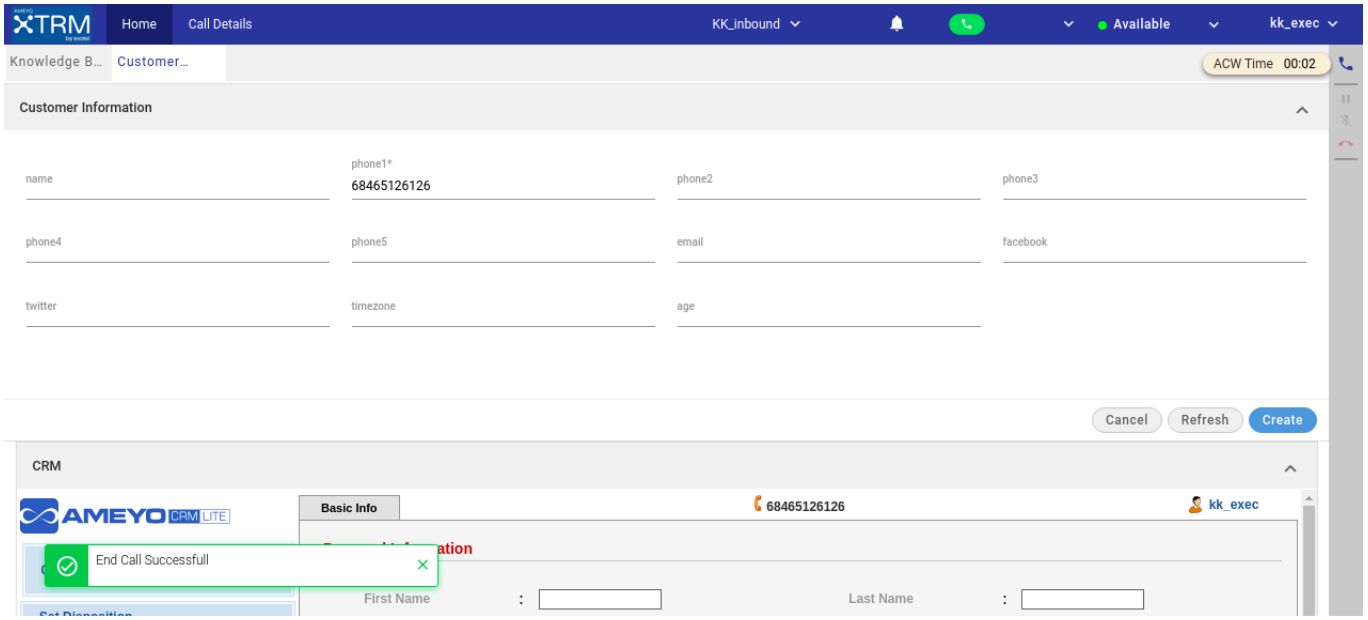


Figure: Disposed of the Call from CRM

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

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

Option to use the Customer Code while Transferring the Call to IVR

The customer code is a unique 6-digit code that can be used to request a transaction at the IVR linked with the Payment Gateway. The agents have the privilege to paste and use a custom code while performing a call transfer to IVR.

The agent can copy the code from the third-party CRM and paste it in the telephony panel during

- call transfer to IVR,
- cold transfer to IVR with the parameter and values (conferIVRData or ivrData): to replicate the crm screen from agent1 to agent2, and
- warm transfer to IVR with the parameter and values (conferIVRData or ivrData): to replicate the crm screen from agent1 to agent2.

Refer to the following screenshot.

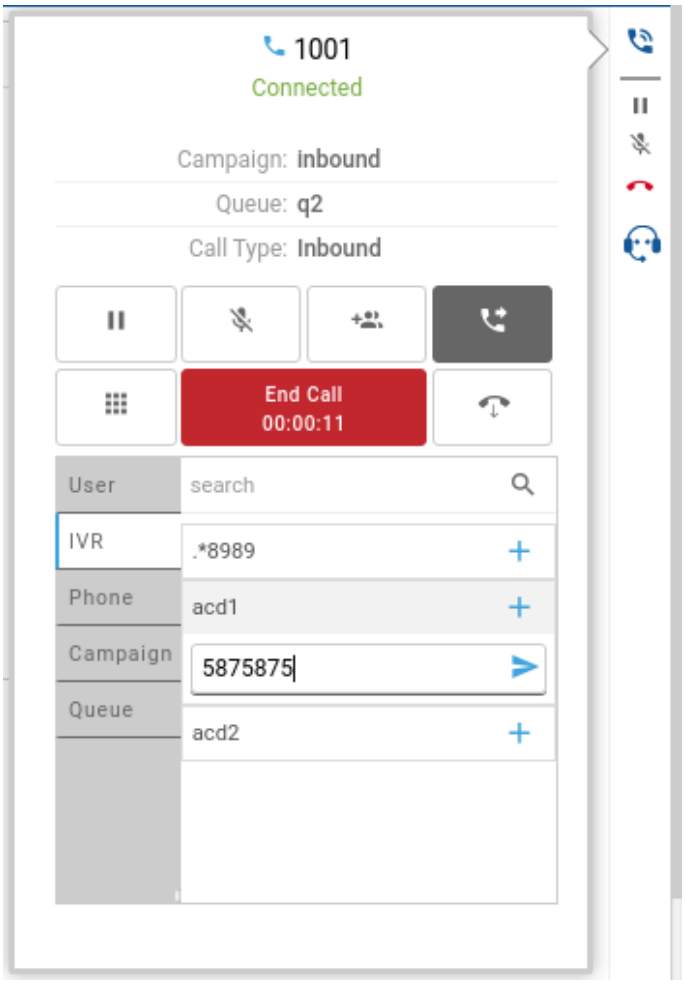


Figure: Copy Customer Code in Telephony Panel

BlackListing the customers at Agent Console (Workbench Level)

The agents also have been given the privilege to blacklist the customer's phone number. A disposition named "Blacklist Disposition" can be used to add the customer to the blacklist. The agent can use this blacklist disposition in both the telephony panel and in the web-chat modal.

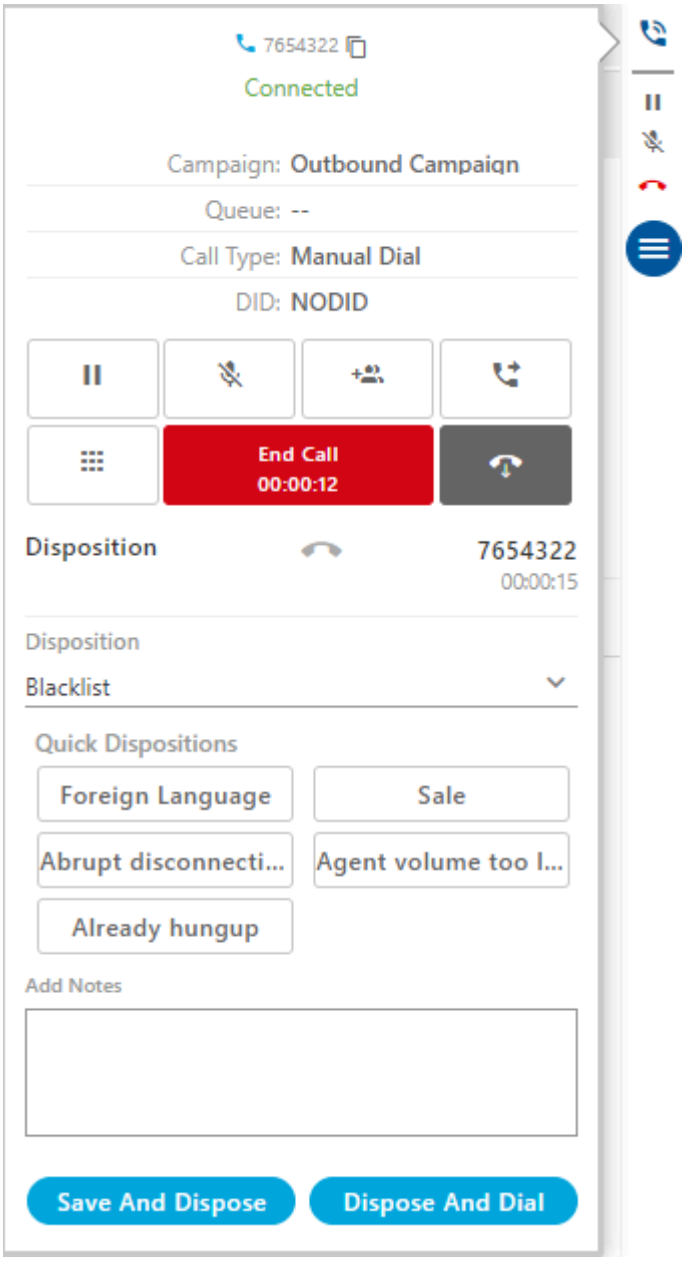
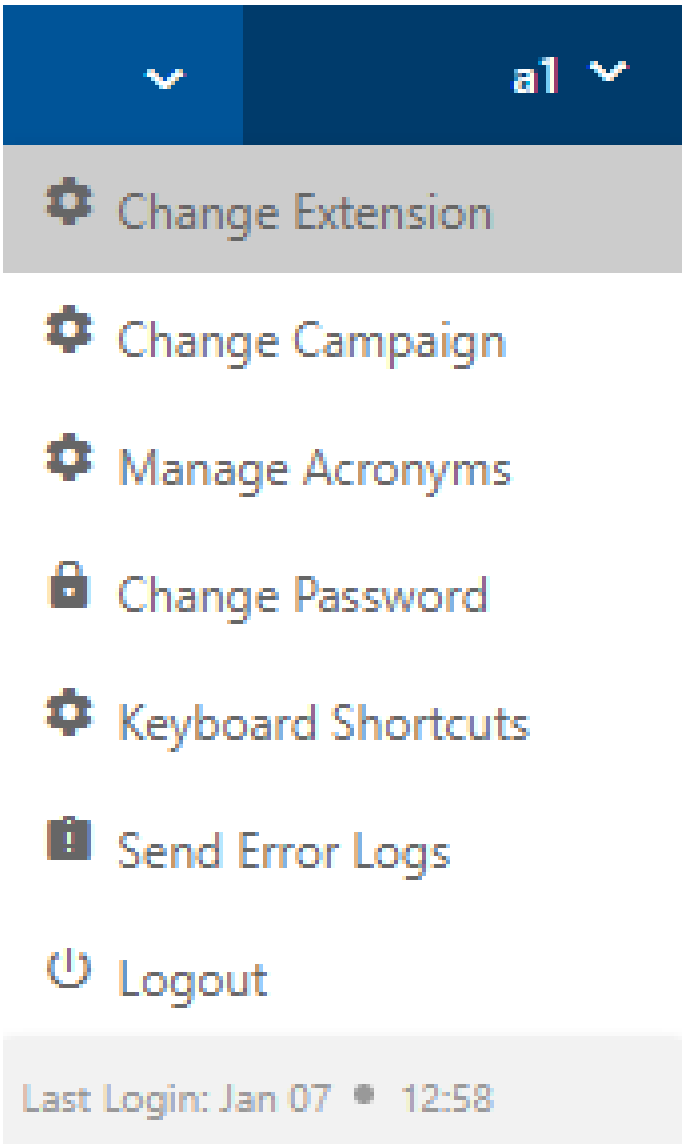


Figure: Blacklist Disposition at Telephony Panel

19.3.7. Logout from Ameyo

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



Click "Logout" to logout from the system.

Related topics

- **User Login & Single Sign-On (SSO)** – Signing in again, SSO options, and session behaviour after login.

20. Platform and Foundational Features

20.1. Core Platform

20.1.1. Key Entities

Introduction

This article lists the Key entities of the Ameyo CC (Contact Center) software.

System

One installation of Ameyo CC software is called the system. It can consist of multiple compute nodes hosting the required software components. Each such installation (or System) can host multiple tenants (or contact centers) simultaneously.

Tenant or CC

A tenant or a CC (Contact center) within the System caters to the contact center functionalities needed by the business for whom it has been set-up. Each such Tenant (or CC) can have multiple processes for different departments within their business.

Process

A process within a CC tenant is typically used by one department of the business for specific business-processes such as “customer support” or “sales” or “collections” etc. No information or agents can be shared across processes. In other words, customers, agents and supervisors are specific to a “Process”.

The target customer set for Processes can be distinct for each process. For example, “sales process” has all prospects of a business however only those customers who get converted become part of the “customer support process” and only those converted customers who default on their payments are likely to be part of the “collections process”.

Ameyo allows the flexibility of having different CRMs for different business-processes configured at the “process” level. For example, a customer could use “LeadSquared” for their “Sales” process while using “FreshService” for “Customer Support” process etc.

> Each “process” can have multiple campaigns within them.

Campaign

The Campaign entity within a “process” which is used to segregate the functioning of a process into manageable teams with a specific focus. The segregation of campaigns could be based on different criteria such as

1. Direction of interaction flow. E.g. “Inbound” or “Outbound”.
2. Geography. E.g. “Bangalore” or “Gurgaon”.
3. etc.

Queues

The logical grouping of agents into small groups catering to a sub-process like inbound customer care.

20.1.2. Process Management

Overview:

The **Process** is a core organizational element within Ameyo's System Configuration hierarchy. Processes act as top-level **containers** for organizing and scoping system resources. All subsequent configurations, including campaigns, user assignments, and various settings, are created and contained within a specific Process. This section details the steps for creating, modifying, and deleting a Process.

Key Benefits:

- **Hierarchical Organization:** Provides a logical structure for managing various business units or workflows.
- **Resource Scoping:** Campaigns, users, and settings are confined to their respective Process, simplifying administration.
- **Data Integration Control:** Allows for specific CRM integration and data propagation rules (e.g., lead/customer removal) to be set at the container level.

Functionality:

A Process serves as the foundational layer of the system setup. It links to a **Table Definition** (which defines the data schema) and controls how data deletion is propagated to an integrated CRM system.

Core Process Attributes:

Attribute	Description	Modifiable After Creation?
Process Name	A unique, identifying name for the Process.	Yes
Description	A short explanation of the Process's purpose.	Yes
Process Type	The operational type of the Process, selected from a dropdown.	Yes
Table Definition	The data structure (table schema) associated with the Process.	**No (Fixed at creation)**

Prerequisites:

- **Administrator Access:** Required to access and modify System Configuration.
- **Table Definition:** The required Table Definition must exist in the system before a new Process can be created.

Usage Instructions:

Create a Process

Follow these steps to create a new process:

1. Click **'Add'** on the Process tab to open the **Create Process** dialog.
2. Fill in the following mandatory fields:
    - **Process Name:** Enter a unique name.
    - **Description:** Provide a short explanation.
    - **Process Type:** Select the appropriate type from the dropdown.
    - **Table Definition:** Associate a table definition with the process.
3. Click **'Done'** to save. The new process will now appear in the Process list.

Modify a Process

Follow these steps to update an existing process's details or integration settings:

1. Select the desired process from the **left panel**. Its configuration fields will populate on the right.
2. Update non-fixed fields such as **Process Name** and **Description**.
3. **Configure CRM and Propagation Options (if required):**
    - **CRM Properties URL:** Enter the CRM properties URL for the process.
        - *Example:* http://<IP_Address_Domain_AppServer>:8786/<CRM_Name>/crmprops
    - **Propagate Lead Removal:** Check this option to ensure leads are deleted in both Ameyo and the linked CRM when removed.
    - **Propagate Customer Removal:** Check this option to ensure customer numbers are deleted in both Ameyo and the linked CRM when removed.
4. Click **'Apply'** to commit the changes, or click **'Refresh'** to discard any unsaved modifications.

Note: If you need to change the **Table Definition**, you must delete the existing Process and recreate it, as this field is locked after initial creation.

Delete a Process

Follow these steps to permanently remove a process:

1. Select the process you wish to delete from the list.
2. Click the **delete icon** (trash can). A confirmation dialog will appear.
3. Click **'Yes'** to confirm and permanently delete the process, or click **'No'** to cancel the operation.

Important Considerations for Deletion:

- Deleting a process is **permanent**.
- The system-assigned **numeric ID** for the deleted process is consumed and **cannot be reused** for new processes.

Related Features/Modules:

- **Campaign Configuration:** Campaigns are created and contained within a Process.
- **Table Definition:** The master data schema used by the Process, configured in a separate module.
- **User Management:** User assignments and roles are typically tied to the Process hierarchy.

20.1.3. Campaign Types

Overview

Ameyo supports multiple campaign types. Each type defines how interactions are initiated, routed, or managed, and comes with a specific set of configuration options.

Types of Campaign

Preview Campaign

Definition/Behavior

- Customer/lead details are displayed to the agent before a call is initiated.
- The agent manually decides when to place the call.

Use Cases

- Calls requiring agent preparation before connecting with the customer.
- Situations where compliance requires an agent to review lead information.

Relevant Settings

- Lead details display.
- Agent-controlled dialing.
- Retry attempts for failed/unanswered calls.
- Wrap-up handling.
- Lead recycling after retries.

Progressive Campaign

Definition/Behavior

- Calls are automatically dialed as soon as an agent becomes free.
- The system maintains a one-to-one relationship between available agents and calls dialed.

Use Cases

- Medium-scale outbound campaigns where continuous flow is required.

Relevant Settings

- Auto-dialing when agent is available.
- Retry logic for unanswered/busy calls.
- Wrap-up time and break handling.
- Lead recycling rules.

Predictive Campaign

Definition/Behavior

- The system predicts agent availability and dials multiple numbers in advance.
- Aims to reduce agent idle time by connecting live calls to agents as soon as they are free.

Use Cases

- High-volume outbound campaigns where agent utilization is a priority.

Relevant Settings

- Dial ratio (calls per agent).
- Abandon call limit.
- Retry attempts and delay.
- Lead recycling.
- Agent allocation rules.

Inbound Campaign

Definition/Behavior

- Handles incoming calls/messages initiated by customers.
- Routes interactions to agents using defined routing strategies.

Use Cases

- Customer service/helpdesk operations.

Relevant Settings

- Routing (round-robin, skill-based, priority, sticky agent).
- Queue size, wait time announcements, and music on hold.
- Business hours and holiday schedules.
- Overflow handling rules.

Blended Campaign

Definition/Behavior

- Supports both inbound and outbound calls in the same setup.
- Agents can switch between modes automatically or manually.

Use Cases

- Contact centers balancing service (inbound) and outreach (outbound).

Relevant Settings

- Blending mode (auto or manual).
- Priority settings (e.g., inbound over outbound).
- Queue allocation for inbound.
- Lead assignment for outbound.

Parallel Predictive Dialer (PPD)

Definition/Behavior

- Similar to Predictive dialing, but dials across **multiple lead lists in parallel**.
- Ensures that campaigns with different lead segments are processed simultaneously rather than sequentially.
- Lead lists are mapped to queues (specific to PPD), so each queue can pull from its assigned list.

Use Cases

- Outbound campaigns where multiple lead lists must run concurrently.

- Scenarios where segmentation (by geography, customer type, product line, etc.) is required within the same campaign.

Relevant Settings

- Lead list assignment per queue.
- Dial ratio and pacing across lists.
- Retry attempts per list.
- Abandon call control (same as predictive).
- Queue-level monitoring of call outcomes.

Campaign Settings

Campaigns share a common set of configurable options. These are detailed under:

1. **General Settings**
    - Campaign name, type, description
    - Time zone, business hours, holiday calendar
    - Caller Line Identification (CLI)
2. **Dialing Parameters (Outbound)**
    - Retry attempts and delay
    - Dial ratio (predictive, power)
    - Max concurrent calls
    - Abandon call handling
3. **Queue Management (Inbound)**
    - Queue size and maximum wait time
    - Routing strategies
    - Announcements
    - Overflow handling
4. **Lead Management**
    - Lead list assignment
    - Lead recycling and prioritization
    - Blacklist/DNC checks

    - Manual or automatic lead assignment
5. **Agent Settings**
    - Agent assignment
    - Max concurrent interactions
    - Wrap-up time
    - Break handling
6. **Monitoring & Reporting**
    - Real-time campaign stats
    - Abandon/drop monitoring
    - SLA compliance tracking

Related topics

- **Outbound Call Context Policies** – How the platform chooses the customer **call context** and voice path for outbound dials (policy types, failover ordering, temporary unavailable behavior on the same flow session, and related preferences).

20.1.4. Call Routing

Overview:

The **Call Routing configuration** enables the Administrator to establish policies and profiles for directing incoming calls. Routing decisions can be based on the incoming channel (Call Context), the Dialed Number Identification Service (DID), or the caller's source phone number.

Key Benefits:

- **Flexible Routing Logic:** Allows calls to be routed based on technical context, caller identity, or the destination number dialed.
- **Prioritized Evaluation:** Policies are followed sequentially, ensuring complex routing logic is executed in a controlled order.
- **Dynamic Assignment:** Enables routing calls either to a specific feature/node flow or cascading to another routing profile for advanced screening.

Functionality:

Call Routing Policies Overview

The system uses three primary policy types for routing incoming calls:

Policy Type	Routing Basis	Description
Call Context Profile	Incoming Channel/Context (e.g., Zap trunks, SIP minutes)	Defines call contexts to route calls through these contexts to a specific node flow in a campaign. Does not require source/destination number identification.
Default Source Phone Profile	Source Phone Number (Caller ID)	Used to identify the caller's specific phone number and route calls originating from that number to a particular node flow.
Default Destination Phone Profile	Destination Phone Number (DID)	Used to route calls landing on a specific DID or toll-free number to a particular node flow.

The Routing Tab

The **Routing Tab** lists and controls the order of active policies:

- **Policy Order:** Policies are evaluated in sequential order from top to bottom, which can be adjusted using the **"Up"** and **"Down"** buttons.
- **Assignment:** Policies are activated by checking the associated checkbox and deactivated by unchecking it.

Prerequisites:

- **Administrator Access:** Required to define and modify routing policies.
- **Defined Node Flows/Features:** Destination node flows or features must be configured within the campaigns before they can be selected in a plan.

Usage Instructions:

A plan defines the set of rules for how calls falling under a policy should be routed.

1. Check the box to **select the policy** you wish to configure (e.g., DefaultSourcePhoneProfile).

2. Click the **add button** (+) under the **"Plans"** header adjacent to the selected policy. This displays the plan creation pop-up.
3. Click the **"Add"** button inside the pop-up to insert a new row, representing a single routing rule.

Step 1: Define the Source (Policy and Context/Contact Number)

This step is defined by the Policy you selected in the main **Routing Tab**.

Policy Name (Where you are configuring the rule)	**Configuration Input** (In the **Context/Contact Number** field)
Call Context Profile	Select an incoming channel/context (e.g., audiocodes, voip).
Default Source Phone Profile	Enter the specific **Source Phone Number** (Caller ID) to match.
Default Destination Phone Profile	Enter the specific **Destination Phone Number** (DID) to match

Step 2: Define the Action Type (Routing Intent)

This selection dictates whether the call's routing is **finished** by a system feature or **continued** by another routing profile.

Action Type Selection	Routing Intent	Subsequent Sub-Action Type
Route to Feature Action (feature.action)	**Route is COMPLETE.** The call is directed to a specific functional feature (like an ACD queue or IVR).	Will display **Feature-based** Sub-Actions.
Route to Profile Plan Action (profile.action)	**Route is CONTINUED.** The call is passed to the plan of a different routing policy for further evaluation.	Will display **Profile-based** Sub-Actions.

Step 3 & 4: Define Sub-Action and Destination (The Final Path)

The options in these final two fields depend entirely on the **Action Type** chosen in Step 2.

Scenario A: Routing to a Feature (feature.action)

This is the most common path, directing the call to a final destination within the system.

Field	Selectable Options	Description
Sub-Action	Select the target system feature: default.acd.feature, did.based.phone.feature, manual.dial.feature, etc.	
Destination	Select the specific destination associated with the feature (e.g., the Queue Name or Phone Number).	**The call is routed here.**

Scenario B: Routing to Another Profile (profile.action)

This path is used to hand the call off to a different set of routing rules defined under another policy.

Field	Selectable Options	Description
Sub-Action	Select the **type** of profile you want to transfer to: cc.call.context.based.profile, cc.source.contact.based.profile, cc.destination.contact.based.profile.	
Destination	Select the **Policy Name** that matches the chosen Sub-Action type (e.g., select DefaultSourcePhoneProfile if you chose cc.source.contact.based.profile as the Sub-Action).	**The call is now re-evaluated against the rules of the selected Policy.**

Related Features/Modules:

- **Call Context Configuration:** Defines the communication channels and contexts referenced by the **Call Context Profile** policy.

- **Queue Management:** The destination for calls routed to features like default.acd.feature.
- **Campaign Configuration:** Where the node flows and features are defined that handle the routed calls.

21. Announcements

21.1. CQA Preview

Introducing the Call Quality Analysis (CQA) Preview Release on ECC 4.x

We are excited to announce the preview release of our new **Call Quality Analysis (CQA)** feature, enabling advanced insights for Emerge customers utilizing the **ECC 4.x platform**. This preview is designed to give you an early look at CQA capabilities at no cost.

Key Details of the Preview

This initial release focuses on core functionality and limited access:

- **Access:** CQA will initially be accessible only to **Supervisors** within the ECC console.
- **Analysis Volume:** Up to **200 recordings per tenant** will be analyzed during this period.
- **Refresh Rate:** Analysis will be performed at the **End of Day (EOD)** for a random selection of 200 connected calls.
- **System Integration:** A temporary Administrator user, "**SupportAdmin**," will be created in each tenant for system integration purposes.

Important Preview Constraints (Beta Phase)

As this is a beta release, we want to set clear expectations regarding support and data handling:

Topic	Constraint and Expectation
Cost & Duration	The preview period is offered at **no additional cost** for an estimated **30-45 days**.
Feature Enhancements	New features, custom dashboards, and enhancements will **not** be taken up during this preview phase.
Data Handling	**All CQA analysis generated during the preview will be deleted** when the preview period ends. No migration of past data will be carried forward

Next Steps and Full Release Information

We are working quickly toward the full production release of CQA:

- **Full Version Availability:** An updated CQA release with **additional features and a new UI** is expected to be available in the **next 45 days**.
- **To Purchase or Discuss Full Deployment:** Please contact your **Customer Success Manager (CSM)** for demos and information on the production-ready version.
- **To Disable CQA or Report Technical Issues:** Please contact **ECC Support** directly.

Webinar Link:-

22. Release Notes

22.1. Introduction to Contact Center Release notes

Overview

Release notes are the official records accompanying every Contact Center (Ameyo) product update . They summarize key enhancements, new features, resolved issues, and any important changes in each release version. This regularly updated documentation helps internal and external stakeholders stay informed about ongoing product improvements.

Purpose and Value

Release notes enable you to quickly grasp what's new or changed, understand how updates impact your workflows, and take any necessary actions to optimize your use of Contact Center solution. They help reduce uncertainty, improve adoption of new features, and support smooth transitions whenever changes are introduced.

Who Should Use Release Notes

- **Engineering Teams:** To understand new functionalities, API changes, and enhancements for development or integration work.
- **Support Teams:**To stay updated on fixed issues and new features for improved customer assistance and faster issue resolution
- **Administrators and IT teams**: Plan configurations and user training based on new capabilities and changes.

- **Supervisors and managers**: Understand feature improvements that aid team performance monitoring.
- **Contact center agents**: Learn about new tools or workflow enhancements that improve daily interactions.

Structure and Navigation

Ameyo release notes follow a consistent format for easy navigation:

- **Version number and release date** at the top
- **New Features** describing latest additions and how they benefit users
- **Improvements** covering enhancements in existing functionalities
- **Bug Fixes** reporting resolved issues and stability improvements
- **Breaking Changes** to warn about modifications that may require action
- Links to detailed technical documentation and user guides for further information

How to Use Release Notes

- Review prior to update deployments to identify potential impacts on integrations or workflows
- Communicate relevant changes and action items to cross-functional teams
- Utilize links for further technical insights or troubleshooting guidance
- Provide feedback on issues or feature requests to drive continuous improvement

Feedback and Engagement

Your input is valuable. Please share your feedback, questions, or enhancement requests related to any release via our support channels.

Versioning Information

Contact Center versions follow semantic versioning, indicating major, minor, and patch updates. This enables you to understand the scale and nature of each release at a glance. For more details on the CC product release support periods, please check out the link below.



Contact Center Product Release Lifecycle & Support Periods

This document outlines key dates and policies for the lifecycle support of contact center product releases (versions 2.X, 3.X, 4.X).

22.2. 6.9 Release Notes

22.2.1. Contact Center - Patch Release Notes 6.9.0

Release Details

Release Date: 24-Feb-2026

Summary/Highlights

This patch release introduces significant security enhancements, including **Two-Factor Authentication (2FA)**, and improves platform resilience through **Tenant-Level License Enforcement**. We have also upgraded our core database infrastructure to **PostgreSQL 18.x** to ensure superior performance and long-term stability. This release focuses on streamlining the agent experience with unified customer resolution and "Create & Dial" workflows.

Build and Version Info

The following table outlines the component builds included in this release.

Component	Build URL
amf	bom.ocir.io/bmvcldyxkwlg/amf:6.7.6.20250721-R_54847
appserver	**bom.ocir.io/bmvcldyxkwlg/appserver**:6.**9.4.20260220-R_274830**
appserver-ui	**bom.ocir.io/bmvcldyxkwlg/appserverui-non-prod**:6.**9.2.20260224-R_276413**
applite	ExoApplite-6.4.1.20240801-R_153309.exe
art	**bom.ocir.io/bmvcldyxkwlg/art**:6.**9.1.20260220-R_274724**
art-dbquery	NA
asrouting	**bom.ocir.io/bmvcldyxkwlg/asrouting**:6.**9.2.20260220-R_274702**
chat-service	**bom.ocir.io/bmvcldyxkwlg/chat-service**:6.**9.2.20260220-R_274704**
citus-patch	**bom.ocir.io/bmvcldyxkwlg/citus-patch**:6.**9.2.20260220-R_274705**
cms	**bom.ocir.io/bmvcldyxkwlg/cms**:6.**9.2.20260220-R_274706**
cms-dbquery	NA
crm-connector	**bom.ocir.io/bmvcldyxkwlg/crm-connector**:6.**9.2.20260220-R_274708**
customer-fetcher	**bom.ocir.io/bmvcldyxkwlg/cfs**:6.**9.3.20260223-R_275415**
data-engine	**bom.ocir.io/bmvcldyxkwlg/dataengine**:6.**9.6.20260223-R_275526**
eureka	**bom.ocir.io/bmvcldyxkwlg/eureka**:6.**9.2.20260220-R_274711**
exoxtrm-ingress	NA
fluent-bit	bom.ocir.io/bmvcldyxkwlg/fluent-bit:100.0.14.20241213-R_171818 -not found
fluentd	bom.ocir.io/bmvcldyxkwlg/fluentd-central-logger:100.0.13.20241213-R_171815
gateway	**bom.ocir.io/bmvcldyxkwlg/gateway**:6.**9.2.20260220-R_274712**
ingress-nginix-controller	NA

Component	Build URL
init	NA
init-exoxtrmutils	NA
interaction-service	**bom.ocir.io/bmvcldyxkwlg/interaction-service**:6.**9.2.20260220-R_274714**
k8tz	NA
kafka-patch	**bom.ocir.io/bmvcldyxkwlg/kafka-patch**:6.**9.2.20260220-R_274715**
logrotate(NA)	bom.ocir.io/bmvcldyxkwlg/logrotate:6.0.14.20241126-R_169000
node-logcleanup	bom.ocir.io/bmvcldyxkwlg/logcleanup-k8s-node:6.0.17.20241226-R_174107
postgres	NA
postgres-operator	NA
postgresql	**v18.1**
Citus version	v14
scheduler	**bom.ocir.io/bmvcldyxkwlg/scheduler**:6.**9.2.20260220-R_274722**
vault	NA
zabbix-server	zabbix-server: 7.2.0
zabbix-agent	zabbix-agent2: 7.2.0
patch	**bom.ocir.io/bmvcldyxkwlg/patch**:6.**9.3.20260220-R_274878**
Kafka	kafka-2.13-3.4.1_1.x86_64.rpm
Redis	bom.ocir.io/bmvcldyxkwlg/redis-with-modules:8.2.3
Kafka-connect	bom.ocir.io/bmvcldyxkwlg/kafka-connect:v1
ksqldb(NA)	confluentinc/cp-ksqldb-server:latest
schema-registry	docker.io/bitnami/schema-registry:7.8.0-debian-12-r2
XMF	**bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework**:6.**9.2.20260220-R_274723**

Component	Build URL
CCDP	**bom.ocir.io/bmvcldyxkwlg/ccdp**:6.**9.2.20260220-R_274703**
CQA	**bom.ocir.io/bmvcldyxkwlg/cqa**:6.**9.1.20260220-R_274707**
omni-ui	**bom.ocir.io/bmvcldyxkwlg/omni-ui**:6.**9.13.20260226-R_277087**

> **Note -** Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle

Features Enhancements

- ***EN-679 || Call Surge Licence Handling - IP Platform***

Incoming call leg license (cm.max.incoming.call.legs) is now enforced at the **tenant (CC) level** instead of the system level, ensuring call surges in one tenant do not impact other tenants.

Scope:

- Per-tenant enforcement has been applied across CallManager, Multi-CC Manager UI, and the license handling logic.
- Applicable to IP Platform.
- The license is now visible and configurable at the tenant level within the Multi-CC Manager UI.
- The effective limit is determined as the lower of the tenant-configured value and the license server value.
- Load testing has been completed to verify tenant isolation under high ingress traffic.
- Rolled out for both 6x and 4x environments (post load validation).

Behavior:

- When a tenant's limit is exceeded, only the excess incoming calls for that tenant are dropped – other tenants are not impacted.
- Tenant isolation is maintained during surge scenarios.
- Cold transfer scenarios are accounted for within the enforcement logic.

Current Limitations (Phase 1)

- Calls that exceed the tenant limit are dropped; graceful voice prompt handling is planned for a future release.
- License distribution continues to operate per app server; centralized cluster-level distribution is on the roadmap for a future enhancement.
- ***EN-490 || Optimize Code Flow - User Session Raw Events, EN-744 || COGS - Optimize Frequent queries In Citus - (COST Optimization Citus)***

System performance and cost efficiency have been improved by streamlining Kafka event consumers and cutting down high-frequency database queries in Citus.

Scope:

- Optimized event processing for the user-session-raw-events and agent-productivity-stage-events Kafka topics.
- Reduced database read/write operations through enhanced caching strategies, request batching, and query consolidation.
- Refactored frequently executed Citus queries identified through pgBadger analysis.
- Improved consumer concurrency and overall infrastructure utilization.
- Changes validated against Agent Session Details, Agent Productivity reports, and Supervisor Monitoring screens.

Outcome:

- Measurable reduction in Kafka consumer lag.
- Approximately 80% drop in frequent Citus query executions.
- Lower overall database load, contributing to improved COGS efficiency.
- Stable and consistent performance in line with the 8-core Citus worker configuration.
- No degradation in reporting accuracy, session handling, or event sequencing.

- ***EN-800 || Two-Factor Authentication (2FA) – 6.x, EN-959 || Two-Factor Authentication Configuration via Admin Panel***

Introduced email-based **Two-Factor Authentication (2FA)** for **/app** login along with a dedicated Admin Panel configuration screen, enabling enhanced tenant-level security with centralized control.

Key Capabilities

- 2FA applicable for **UserID + Password** authentication on /app.
- OTP generated only after successful credential validation.
- OTP delivered via Email (SMTP), configurable per Contact Center (CC).
- Configurable per CC and per role (Admin, Supervisor, Group Manager, Agent on UAD).
- Dedicated Admin UI for:
  - Enabling/disabling 2FA
  - Managing OTP policies (expiry, max attempts, resend delay, max resend attempts)
- Reuses centralized OTP lifecycle (shared with Forgot Password flow).
- No licensing dependency.
- MultiCC Manager excluded

Behavior

- Invalid credentials → No OTP generated.
- Valid credentials → OTP sent to registered email.
- Clear error handling for invalid/expired OTP, max attempts reached, or missing email configuration.
- Effective only when UserID–Password authentication is enabled.
- Bypassed for LDAP/CRM-based authentication.

Limitations (Phase 1)

- Email OTP only (no SMS, WhatsApp, voice, or authenticator app).
- Applicable only to /app (Omni toolbar and mobile apps not covered).
- Single authentication scheme per CC.

Outcome

- Strengthened login security.
- Centralized and simplified 2FA configuration.
- Improved administrative governance and visibility.

Documentation **Link** (Internal)

- ***EN-160 || OmniUI: Implement Create and Dial Customer Flow same as 4x, EN-149 || Create Contact Support in 4.x proxy:***

Enabled end-to-end **Create & Dial** support in the new 4x–6x **Omni UI**, ensuring seamless customer creation and immediate outbound dialing with full 4.x parity.

Key Capabilities:

Backend (4.x Proxy Support):

- Enabled Create Contact via 4.x proxy for compatibility with 4x–6x UI.
- Supports inbound and manual dial customer resolution.
- Handles multiple customer records mapped to the same phone number.
- Standardized API responses for:
  - Successful creation
  - Duplicate records
  - Missing mandatory fields
- Ensures consistent behavior across 4x and 6x.

Frontend (OmniUI Create & Dial Flow):

- Introduced Create & Dial drawer aligned with Edit Contact UI.
- Dynamic form generation based on campaign data table definitions.
- Mandatory field validation before contact creation.
- Automatic outbound dial triggered upon successful creation.
- Maintains form state with clear validation and dial error handling.
- Fully integrated with existing contact and dial services.

Outcome:

- Seamless customer creation and outbound dialing in a single flow.
- Reduced agent effort and context switching.
- Consistent UI/UX and API behavior aligned with 4x.
- Improved customer resolution across inbound and manual dial scenarios.
- ***EN-888 || Real-time Notification Engine: Targeted Alerts via API and Nodeflow:***

Introduced a centralized Real-Time Notification Engine enabling targeted, metadata-rich alerts triggered via API or Nodeflow, delivered instantly across agent interfaces.

Key Capabilities:

1. ***Multi-Target API Triggering***

- Trigger notifications via REST API.
- Supported targeting:
  - user_id
  - queue_id
  - campaign_id
  - role_id
  - interaction_id (live interaction targeting)
- Supports custom metadata JSON payload.
- Designed to handle high-concurrency triggers reliably.

2. ***Nodeflow Integration***

- Added “Send Notification” node in Nodeflow.
- Supports dynamic variable mapping (e.g., customer name, order ID).
- Destination selection (User, Queue, Role) configurable within node.

3. ***Multi-Surface Delivery***

- Delivered across:
  - Omni Toolbar
  - Voice Toolbar
  - Mobile Apps
- Notification badge count for unread alerts.
- Slide-in toast and Notification Center UI support.
- SDK event listeners (e.g., notification received events) for CRM integrations.
- Consistent iconography and UI behavior across applications.

4. ***Priority & Metadata Handling***

- Supports priority levels (Info, Warning, Critical).
- Metadata accessible via SDK for click-to-action workflows.

Performance & Reliability

- Near real-time delivery for active sessions.
- Designed for high availability and minimal latency.

Outcome

- Enables proactive, targeted agent alerts.
- Reduces dependency on manual escalations.
- Improves responsiveness to high-priority events.
- Provides an extensible foundation for future actionable and persistent notifications.

Documentation Link (Internal)

- ***EN-804 || Mask Privilege in Omni 3.0 (6x and 4x-6x) , EN-1276 || Mask Privilege Naming Not Aligned with Omni Campaign Terminology, Causing Confusion:***

Delivered comprehensive Mask Privilege management UI in OmniUI 3.0 with aligned Omni terminology, ensuring consistent behavior across both 4x and 6x environments.

Key Highlights:

- Dual-level privilege configuration: System (Contact Center) and Campaign.
- User-specific masked privilege management.
- Campaign-level privileges override system-level settings where applicable.
- Applicable to both Voice and Chat interactions (handled at OmniUI level).
- Real-time updates on agent login or toolbar reload.
- Integrated with existing masked privilege backend APIs.
- UX-aligned implementation with standardized terminology.

Terminology Alignment (Omni-Aligned Naming):

- **System Privileges**
  - Transfer Interaction
  - Confer Interaction
  - End Interaction Allowed

    - View Disposition of an Interaction
    - Set Autocall Status
    - Modify Campaign
    - Tabs Visibility Controls
- ***Campaign Privileges:***
    - Manual Interaction
    - Transfer Interaction
    - Confer Interaction
    - View Disposition of an Interaction
    - Listen to Campaign Voice Logs
    - View Cancel Preview

  Outcome

    - Centralized and consistent privilege control in OmniUI 3.0.
    - Clear, interaction-based terminology across Voice and Chat.
    - Reduced configuration ambiguity for administrators.
- Seamless cross-version compatibility (4x & 6x).
- ***EN-115 || Make Exotel Logos Consistent across Screens:***

Standardized and updated Exotel branding logos across key application surfaces in both 4x and 6x platforms to ensure consistent visual identity.

Coverage Platform:

- 4x (All personas)
- 6x (All personas)

Updated Areas:

- Desktop applications
- Navigation bars (collapsed & expanded states)
- Main toolbars
- Headers & footers
- Modals and pop-ups

- Login & authentication screens (Login, Password Reset)
- Email templates (OTP, password reset, notifications)
- System pages (e.g., 404)
- Help & support sections
- Empty states and other legacy logo surfaces

Limitation:

- Reports (including report headers and exported files) are not covered under this scope.

Outcome:

- Unified branding experience across core application touchpoints.
- Consistent logo implementation across 4x and 6x environments.
- ***EN-291 || Enforce Session Timeout from Configuration:***

Session timeout behavior is now fully aligned with the configured client_session_timeout value, ensuring consistent and predictable logout behavior across supported clients.

Key Highlights:

- Session timeout value is read from configuration at **Contact Center** level during login.
- Client session expiry strictly follows the configured timeout.
- Timer resets based on user activity using the same configured value.
- Clean logout flow triggered on timeout with proper backend logging.
- Hardcoded timeout values removed from toolbar and CRM integration logic.
- Backend logs capture applied timeout value and reason (CLIENT_SESSION_TIMEOUT).
- No service restart required for configuration changes (applies to new logins).
- Supported clients:
    - **Web.toolbar (JWT Toolbar)**
    - ***java.client.ui*** **(for JWT, OmniApp, OmniToolbar)**

Default Behavior:

- If no configuration is available at CC or system level, a default timeout of 3 minutes is applied.

Outcome:

- Centralized timeout control via configuration.
- 100% alignment between configured timeout and actual logout.
- Improved stability and observability of session behavior.
- ***EN-401 || Evaluate Superset 6.0 Large CSV Export Capability:***

Completed evaluation of large CSV streaming export capability in Superset 6.0 to assess feasibility of supporting exports beyond the historical 100k row limit.

Key Evaluation Areas:

- Validation of streaming CSV export for datasets exceeding 100k rows.
- Performance assessment for multi-million row exports.
- Memory utilization impact on backend and browser.
- Required configuration updates (e.g., streaming thresholds).
- Deployment and dependency considerations.
- Backward compatibility with existing dashboards and reports.
- User experience during large export (progress handling, error scenarios).

Outcome:

- Validated large dataset export capability in staging.
- Documented required configuration and deployment changes.
- Assessed scalability and system impact.
- Provided Go/No-Go recommendation for adopting Superset as the default reporting tool in place of Jasper.

Superset Upgrade Documentation Link (Internal)

- ***EN-333 || 4.x Appserver to Work seamlessly with Old UI when Harmony mode on and 6.x service down:***

Enabled seamless operation of 4.x Appserver with Old UI when Harmony mode is ON and 6.x services are unavailable or network connectivity between 4.x and 6.x is disrupted.

Key Highlights:

- 4.x continues to function independently when:
  - 6.x services are down
  - Network disruption occurs between 4.x and 6.x
- Calls handled in 4.x during downtime are preserved.
- Once 6.x services/network are restored, call details are automatically synchronized.
- Interactions and related records are created in 6.x through eventual consistency.

Outcome:

- Improved reliability during 4.x–6.x migration phase.
- No operational disruption for agents during 6.x outages.
- Ensured data consistency and post-recovery synchronization.
- Strengthened hybrid (Harmony) deployment stability.
- ***EN-327 || Immediate Cache Expiry on 6.x service When configuration changes happen in 4.x***

Implemented real-time cache invalidation in 6.x services when configuration updates are performed in 4.x.

Key Highlights:

- Automatic cache refresh triggered on 4.x configuration changes such as:
  - Campaign creation or deletion
  - Process updates
  - User modifications
- Immediate cache update in 6.x microservices including:
  - Interaction Service
  - Data Engine
  - CFS
- Eliminates stale configuration data across hybrid environments.

Outcome:

- Ensures configuration consistency between 4.x and 6.x.
- Reduces delay in reflecting admin changes.

- Improves reliability during 4.x–6.x migration phase.

- ***EN-154 || Unified Customer Contact Resolution and Context Aggregation using External CRM ID,***
  EN-328 || Third Party Contact Support - CRUD 6.x,
  EN-330 || Third Party Contact Support - Past Interaction Query on the Basis of Third Party Contact:

Enabled unified customer identification and history aggregation using External CRM ID (Universal Customer ID) with complete third-party contact support in 6.x.

Key Capabilities:

Unified Customer Resolution

- Customer resolution shifted from ECC Customer ID to External CRM ID.
- Consolidated past interactions (Voice, Chat) across multiple ECC contacts sharing the same CRM ID.
- CCDP sentiment, intent, and summary aggregation unified at CRM ID level.
- CRM CTI pop displays consolidated customer history using CRM ID.
- Supported for 6x.

Third-Party Contact CRUD (6.x)

- Introduced CRUD APIs for managing third-party contact identifiers.
- Supports mapping between ECC contacts and external CRM entities.
- Maintains backward compatibility where CRM ID is not present.

Past Interaction Query by Third-Party ID

- Interaction Service API enhanced to fetch past interactions using:
  - Third-party ID
  - Mapping ID
- Enables CRM-based unified interaction lookup independent of ECC Contact ID.

Fallback Handling

- If CRM ID is null/empty, system falls back to campaign-level interaction history without disruption.

Outcome

- Unified cross-contact customer journey view.
- Improved context aggregation accuracy.
- Reduced fragmented or duplicate customer records.
- Stronger CRM-integrated experience for enterprise deployments.

Documentation Link (Internal)

- ***EN-853 || Fetch recording basis CRT Object Id & CallId as Optional:***

Enhanced VoiceLog APIs to enable CRM systems to fetch call recordings using **campaignId** and **CRT Object ID** as primary identifiers, making **callId optional**.

Key Enhancements:

1. **Play & Download APIs Updated**

- `callId` is now optional (previously mandatory).
- If `callId` is provided → exact recording is fetched (no behavior change).
- If `callId` is not provided → recording resolved using campaignId + crtObjectId.
- Fully backward compatible with existing integrations.

2. **New VoiceLog Metadata API**

- Introduced metadata API to fetch all recordings linked to a CRT Object.
- Supports optional filters:
  - `campaignId`
  - `processId`
  - `callId`
- Returns detailed recording metadata for CRM-side resolution.

3. **CRM URL Standardization**

- `campaignId` and `CRT` now consistently appended to:

    - CRM iframe / popup URLs
    - AppSDK events
    - Nodeflows
- Ensures reliable recording resolution without fragile identifiers.

4. **Improved Validation & Error Handling**

- Invalid `crtObjectId` → 404 response.
- Case-sensitive query parameter validation (e.g., `callId`).
- Explicit handling when filters yield no results.

Behavior

- `campaignId` is treated as the stable interaction anchor.
- `callId` used only for precision (optional, non-blocking).
- No UI toggle – behavior always enabled.

Outcome

- CRM-integrated customers can fetch recordings using campaignId + CRT.
- Eliminates dependency on callId for recording access.
- Improves reliability of post-call workflows.
- Reduces recording-related CRM integration issues.
- ***EN-841|| Agent Assist : Ability to stream calls for a specific campaign in a 6X ECC tenant:***

Enabled campaign-level integration of **OneAssist** within 6x ECC, allowing real-time call streaming for configured campaigns without any node flow changes.

Key Capabilities:

- Admin can map a campaign to a specific Agent Assist configuration.
- Automatic backend retrieval and management of WebSocket streaming URL.
- Real-time streaming of:
    - Agent audio
    - Customer audio
    - Interaction metadata

- Agent Assist UI auto-activates for mapped campaigns.
- No manual inputs (API keys / WebSocket URLs) required in UI.
- Feature behavior (transcripts, smart replies, masking) fully controlled by OneAssist.

Supported Scenarios (Phase 1):

- Inbound voice calls (Legs platform).

Limitations:

- Outbound and callback calls are not supported in this phase.
- Only voice campaigns are covered.
- Campaign-level configuration only (no flow-level control)

Outcome

- Seamless real-time Agent Assist activation at campaign level.
- Zero impact on existing call routing and handling.
- Centralized configuration with OneAssist as the source of truth.
- ***EN-406 || Salesforce Omni Toolbar Integration Fixes ,***
  EN-241 || Salesforce Toolbar Enhancements (Link, Unlink, Create Record):

The Ameyo CTI Toolbar has been officially certified for Salesforce Lightning with Harmonytoolbar UI. This certification ensures seamless compatibility of the new Harmony toolbar UI with existing voice and chat capabilities previously validated on the old Omni UI.

Key Capabilities:

- Full support validated for Inbound Voice, Outbound/Dialer, and Chat interactions.
- Verified seamless agent login, call handling, screen pop, chat flow, and activity logging.
- Able to create a new record, link and unlink record.

Limitations:

- The chat transcript URL is being generated within the activity record, however, the link is currently not accessible and does not open the transcript.
- Customer search, creation, and linking with a custom object functionality are currently not working as expected.

Tech Tasks

- ***EN-684 || Upgrade postgres to latest stable version for XMF***
  EN-685 || Upgrade postgres to latest stable version for superset
  EN-686 || Upgrade postgres to latest stable version for chat-service 6.x
  EN-683 || Upgrade postgres to latest stable version for Ameyo Clock
  EN-670 || Upgrade postgres to latest stable version for CMS
  EN-667 || Upgrade postgres for App Server, UI Server, ART - 6.x
  EN-677 || Postgres version upgrade for k8s:

As part of this release, the platform database has been upgraded from PostgreSQL 14.x to PostgreSQL 18.x (latest stable release) across core services and infrastructure components.

Upgraded Components:

- XMF
- Superset
- Chat Service (6.x)
- Ameyo Clock
- CMS
- App Server, UI Server & ART (6.x)
- Kubernetes (K8s) deployments

Upgrade Details:

- Previous Version: PostgreSQL 14.x
- Current Version: PostgreSQL 18.x

Benefits:

- Improved performance and query optimization
- Enhanced security and stability
- Access to latest database features and long-term support
- Better overall reliability and scalability

The upgrade has been successfully completed and validated as part of this release.

Documentation Link1 , Link2 For Postgres Upgrade (Internal)

Limitations and known facts/Issues with features/fixes

Current Limitation/ Known Issues

EN-142448 || For inbound calls, the popup for multiple customers does not appear in toolbar

GA-14838 || filterable and searchable columns shown three times in preview alternate number list

GA-14853 || Create and Dial is not supported in tollbar in duplicate customer feature support story

GA-14022 || AddCustomerInfoToCRMUrl this flag is working only at system level only.

EN-142553 || **EN-140238** | SAML is not supported with omni toolbar

GA-14884 || Bell Notification Not displayed after Churn | Preprod setup

GA-14882 || Toolbar || sometimes during manual dial we are facing issue : invalid number

GA-14851 || Duplicate customer handling || Mouse is shown on preview customer screen (arrow shown)

GA-14843 || The Call Details screen under the Manage tab on the Supervisor interface is distorted

GA-14842 || Transfer to user/Confer to user :Not able to select queue in queuelist

GA-14841 || Transfer to user/Confer to user :Queuelist shown if we are going to click on campaign option (screenshot attached)

GA-14534 || Blacklist feature || Number is only blocked if we add the zero before the number

GA-14933 || Data is not updating in campaign_customer table after the call disposed thats why same number is dialable infinity time ||Third party masking setup is down

GA-14932 || Create and dial : customer has been created successfully but calling is not working || third party masking setup is down

GA-14935 || dial time Restriction setting at campaign level:dial time is not updating in campaign_customer table for the already customer

GA-14937 || user-disposition-retry setting enabled after call disposed ||campaign_customer table should be updated based on setting||issue : changes are not reflecting

GA-14958 || Confer Call Icon Persists After Agent Ends Conference

EN-142448 || For inbound calls, the popup for multiple customers does not appear in toolbar

GA-14956 || Supervisor Can Force Logout Agent Without Providing a Reason

GA-15053 || Bulk User Upload: Users face issues during upload if the column names or their sequence are changed in the downloaded CSV file, even after mapping the columns correctly during upload.

GA-15098 ||Non-Dialable | Not working with callback

GA-14935 || dial time Restriction setting at campaign level:dial time is not updating in campaign_customer table for the already customer

EN-132681 || Excluded disposition feature is not working on supervisor under manage contacts

EN-141977 || Disabled Filter At System Level Is Working

EN-140367 || A filter created at the system level and not assigned to a campaign is still applied to all campaigns (legacy).

GA-15224 || Callback failure logs are not available in the app server logs to identify why the calls failed

GA-15235 || Callback initiate story (EN-142572) || Callback is not initiated if agent is logged in and agent is on break || Campaign callback

EN-145173 || MultiCCManager || Click on contact tab||Reverting on main login screen||Not able to work on contacts tab from multiccmanager

EN-145660 || "Abandon At ACD" data not dumping for Chat Queues when no agent is logged in || Queue Monitoring

EN-145484 || Closed Interactions|| Search field not working with Customer Name

GA-15313 || Customer searching issue || Serachable column "name" splitted into two if we providing the name with space

EN-146524 || Contacts tab on admin and supervisor ||bulk upload ||complete data columns fields are not shown for mapping

EN-146522 || Messenger: mp3 and mp4 format support issue

GA-15303 || Whatsapp and messenger not tested in same campaign .Whatsapp with XMF ||Chat_toolbar_info configured on the basis of queue||Unable to initate the Whatsapp

EN-142448 || For inbound calls, the popup for multiple customers does not appear in toolbar
outbound chat as Whatsapp business number option is not showing on UI || due to this unable to test Whatsapp and messenger in same campaign
GA-15302 || Storage Azure || Transcript failed to send on azure if we are trying to send multiple attachment at a time from agent
HR-609 || OutBound Chat Summery is not Generated.
HR-604 || Past interaction count and list are not showing when the CCDP flag is enabled.
HR-658 || In a few conversations, the Intent heading is not being generated correctly based on the interaction conversation
HR-642 || Case Id Not getting Updated in Journey.
HR-640 || A meaningful chat summary was not generated based on the agent and customer conversation.
HR-633 || Summary sentiment does not match the interaction sentiment.
HR-616 || CQA AI scoring should not be analyzed for unattended chats.
HR-631 || For all calls, the Supervisor user should be able to perform manual scoring, whether AI scoring is conducted or not
HR-630 || When AI Analysis is disabled, those Quality Profile options should not appear on the AI Audit screen.
HR-629 || When Tasker is down CQA score is showing 'No Score Selected'
HR-628 || Quality Profile Assignment/Quality Profile Creation option is showing twice on screen
GA-15474 || Negative UDH Wrap Time Dumped in omni_interaction_denormalised_interval_5_min for Auto-Transferred Chats
GA-15503 || Call Details Report ||masking campaign ||Getting a blank report if we run the report with a phone filter either passing the mask number or unmask number.
GA-15452 || UDH dumping issue with voice campaign and omni campaign
GA-110 || Omni Loosely coupled ||customer creation failing for newly created process

EN-142448 || For inbound calls, the popup for multiple customers does not appear in toolbar

GA- 230 || System Disposition Incorrectly Displayed as "Connected" When Agent Is Force Logged Out During Ringing State

GA-15634 ||Not showing the rows per page selection option on call history page in 6.x , While it was available previously For all User Roles
Reason :This is to intentionally hide it, to implement CQA and CCDP flow.

EN-1273 || Agent Able to Perform Manual Dial from CRM App Even When Manual Dial Privilege Is Masked || System & Campaign Level || 6x

EN-790 || Auto Answer Settings Not Saved for Voice and Chat at Campaign Level

EN-1436 || Customer Unable to Upload Multiple Attachments on Webchat || Omni || 6x

EN-1426 || Chat Transcript Not Sent to Customer Despite Admin Configuration || 6x

EN-800 || Two factor only in /app

EN-676 || Customer Resolution issue in ECC in case of inbound call if multiple customer saved with same number

EN-291 || Enforce session timeout from configuration

Fixes

GA-15107 || During force login the 1st user doesn't get logout properly
GA-15100 ||Create a flag to persist error records in DB for lead upload
GA-15223 || Callback upload from Supervisor: During upload, if is_self_callback is false, then the userId being passed should be bypassed instead of failing due to a user ID mismatch.
EN-145356 || Agent screen || Complete Contacts data-column are not shown everywhere in contacts tab ,in live interactions
HR-614 || CQA scoring is sometimes not showing in the Closed Interaction tab under the Quality Profile Score column.
HR-646 || The screen is getting blank after creating a duplicate Quality Profile. After switching tabs, the screen is getting refreshed.
HR-613 || The supervisor is unable to save CQA manual scoring with comments.
EN-147340 || Messages Not Exchanged Between Agent and Customer After Reload During Ongoing Chat
GA-15421 || whatsapp inbound chat ||customer name is not saving if performing inbound whatsapp chat
GA-53 || Contact and Cases Not Displayed in CRM Integration Tab || Omni
GA-155 || Not Getting Correct Graph And Data In Omni Live Monitoring
GA-94 || Auto Call On/Off data points are incorrect
GA-47 || Agents are force-logged out and everything looks fine from the Ameyo DB side, as the logout time and reason are correctly recorded (see screenshot).However, in Live Monitoring it still shows in right side but not on left side

Customer Reported and Legacy Bugs Fix

System Common Bugs

- ***SL-18034 || (DCA20260129738951):Issues in accessing hdfcsecurities.ameyo.net***

Issue:

The HDFC Securities URL was inaccessible for a period of time. An alert was triggered

indicating 90% CPU usage on the ingress-nginx-controller, which led to degraded system performance.

Upon investigation, it was identified that a high volume of API calls to: `/configuration/serverpreference/agentDashboardId` was being triggered repeatedly. This excessive API traffic caused backend performance degradation and significantly increased CPU utilization.

Fix:
An immediate fix was implemented to control unnecessary API calls.

- A guard condition has been added to prevent the /configuration/serverpreference/agentDashboardId API call when the agent is already on a call (i.e., when a CRT object is present).
- This ensures that redundant API requests are not triggered during active call sessions.
- As a result, backend load and CPU utilization are stabilized.

The fix has been provided in the latest Appserver UI build.

- ***EN-694 || Toolbar user should logout on failover:***

Improved failover handling to ensure toolbar users are securely logged out during app server failover scenarios, aligning behavior across applications.

Key Improvements:

- Toolbar now redirects users to the login page during failover.
- Added guided alert message before reload confirmation (for WebRTC without single-session) to ensure proper reload during system switch.
- Improved handling for:
    - Reload scenarios
    - Minor network fluctuations
    - Keepalive/session ping failures
- Disabled auto-relogin configuration in 6.x to prevent inconsistent session behavior during failover.

Behavior Overview

- **Voice Toolbar**

    - Automatic reload for extension-based calling & single-session WebRTC.
    - For non-single-session WebRTC, users receive a guided system update alert followed by reload confirmation.
- **/app**
    - Redirects to login on failover (no change).
- **/omniapp**
    - Redirects to login when session validation fails.
- **/newapp**
    - No changes (application planned for deprecation).

Outcome

- Improved reliability during failover.
- Consistent logout behavior across applications.
- Reduced risk of stale or invalid sessions post failover.
- Better user guidance during backend system switch.

Voice

- ***SL-17902 || DCA20251230726565:delay in lead page:***

Issue:

The Lead Page under Process was taking approximately 1 minute to load every time it was accessed. This delay was impacting operations, particularly during lead assignment, as users had to wait for the page to fully load before proceeding.

The root cause was identified as sequential database queries – for each lead, a separate database query was being executed, leading to significant performance degradation.

Fix:
The lead fetching logic has been refactored to optimize performance.

- Instead of executing sequential queries for each lead,the system now fetches all leads by Process ID (pId) in a single query

This optimization significantly reduces page load time and improves the lead assignment experience. The fix has been provided in the latest CMS build.

- ***EN-480 || [id1-citus-1] Problem: DB [data_db] || Excessive Concurrent Calls to Agent Self Monitoring API Causing High DB Load:***

Issue:
The Agent Self Monitoring API : `/cc-list/<cc-id>/stats/agent-selfmonitoring/` was being triggered far more frequently than expected from the toolbar.

This resulted in:

- A high number of concurrent database queries
- Increased query latency
- Unnecessary load on the datadb

Fix:
The UI logic has been optimized to prevent excessive API calls:

- Removed API triggers on **tab switching**
- Removed API triggers on **toolbar reload**
- The API is now called **only via the 2-minute interval timer**

This significantly reduces database load, improves query latency, and stabilizes overall system performance.

- ***SL-17817 || EN-674 || user_user_call_leg_details orphan records not cleaned on user deletion:***

Issue:
When a user was deleted from the system, corresponding records in the user_user_call_leg_details table were not fully cleaned up, leading to orphan entries. This caused data inconsistency and production issues during toolbar dialing.

Scenario:

- A user was created with a **lowercase username** and mapped to a specific extension and number.
- The user was deleted.
- A new user was created using the **same username in uppercase**.

Although the old lowercase user entry in `user_user_call_leg_details` was removed, the newly created uppercase user automatically inherited the extension and number previously

mapped to the deleted user.

This resulted in unintended extension mapping and dialing inconsistencies.

Fix:
In the latest **CMS build**, user deletion handling has been enhanced:

- When a user is deleted, **all associated user-specific leg entry records are now properly cleaned up**.
- This prevents orphan data and unintended extension reassignment.
- The fix applies only to **user deletion events** and does not impact active users or normal call flows.

This ensures data consistency and prevents toolbar dialing issues caused by stale mappings.

- ***SL-18085 || DCA20260206742173:Talk time mismatch for the user H17965 under fort Branch_SL:***

Issue:
In the batch processing of the *Agent Productivity Stage Consumer*, when both ACD and CSD events for the same session were received together within a single batch, only the ACD events were stored in the agent productivity stage store. The corresponding CSD events were skipped.

Due to the absence of the last processed CSD event entry for that session in the agent productivity stage store table, subsequent unprocessed ACD events were not picked up for processing. As a result, APR (Agent Productivity Report) calculations were not generated for those ACD events.

This issue has been resolved in the latest data-engine build.

Monitoring Data and Reports

NA

Omni Campaign - Voice and Chat Interactions

- ***SL-17919 || 6x || Not Able to upload the chat post processing nodeflow:***

Issue:
In the previous Appserver UI build, users were unable to upload the Chat Post-Processing

nodeflow from: Campaign → Advanced Settings → Chat Post Processing

While attempting to upload the nodeflow file, the UI displayed the following error message: “There was a problem uploading the nodeflow file. Please try again later.”

Due to this issue, chat interaction data could not be processed further, impacting Salesforce chat activity creation and related integrations**.**

Fix:
The issue has been resolved in the latest Appserver UI build. Users can now successfully upload the Chat Post-Processing nodeflow file from:
Campaign → Advanced Settings → Chat Post Processing

The upload process works as expected without any error, enabling proper chat interaction processing and downstream integrations (e.g., Salesforce activity creation).

- ***EN-749 || DCA20260102727440:Supervisor|| IVR status data | Under Waiting calls not showing || 6x***

Resolved an issue where IVR calls were not appearing under the “Waiting Calls” section in the Supervisor view within 6x.

Enhancement Details

- Corrected backend condition handling impacting IVR status data.
- Ensured accurate population of calls under the “Waiting” state.
- Validated across latest App Server builds.

Outcome

- Supervisors now see correct real-time IVR waiting call data.
- Improved accuracy of queue monitoring.
- Enhanced operational visibility for live call tracking.

Reports Delivered

The following are the names of Reports which QA verifies:

1. CALL History

2. CALL Details

3. ACD Abandon Call Detail Report

4. ACD Call Details

5. ACD Call Interval Summary

6. ACD Call Summary

7. AGENT Session Details

8. AGENT Productivity Summary

9. AGENT Productivity Interval Summary

10. ACD Abandon Call Summary Report

11. QUEUE Performance Report

12. OMNI Call Details Report

13. OMNI Chat Detail Report

14. OMNI INTERACTION CALL History

15. OMNI INTERACTION Detail Report

Sharing below the names of the reports which are mentioned in the Reports tab but not delivered:

1. INTERACTION Activity Daily Report

2. FEEDBACK Report

3. CHAT Channel Report

4. TRANSITION Daily Report

5. ACD Video Chat Details

6. CRM Lead Details Report

7. INTERACTION Service Level Report

8. Supervisor-QA-GM Productivity Summary

9. CRM Details Report

10 ACD Abandon Video Chat Details Report

11. Calls Quality Report

12. VIDEO Chat History

13. KYC Officer Quality Report

14. AGENT PRODUCTIVITY SUMMARY FOR VIDEO CHAT

15.AGENT Chat Report

16. CHAT Agent Productivity Report

17. KYC Request Activity Report

18. KYC Request Summary Report

19. KYC Request Date Wise Summary Report

20. KYC Request Detail Report

21. GROUP AGENT Productivity Summary

22. GROUP AGENT Productivity Interval Summary

23. Conference Report

24. CALL Distribution Interval Summary

25. GROUP AGENT Session Details

26. LEAD Penetration

27. CALL Distribution

Browser Version

Chrome Version : Version 145.0.7632.76 (Official Build) (arm64)

Hot Fixes

- ***SL-18190 || (DCA20260304752939) 6x|| Whatsapp_Bot_Configuration_issue***

Issue:

An issue was identified in the WhatsApp Bot configuration where multiple setups could not

use the same **Bot ID** due to a unique constraint on the `channel_bot_id` column in the `app_vs_bot_configuration` table.

Since Bot IDs are system-generated and can be reused across different environments (Dev/UAT/Production) under the same domain, this constraint caused configuration failures for new setups.

Fix:
The issue has been resolved by removing the unique constraint on `channel_bot_id` After the fix, the system now allows Bot configuration entries with the same Bot ID across different setups as expected.

The fix has been validated and deployed, and the WhatsApp bot configuration is functioning correctly.

Build Tags
XMF Build: *bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework:6.9.3.20260310-R_280449*
Patch: *bom.ocir.io/bmvcldyxkwlg/patch:6.9.5.20260310-R_280653*

- ***EN-1783 || Webrtc hold/unhold call from SDK removed, make same as /app behavior***

Improved WebRTC call handling by removing the additional hold/unhold method invocation from the SDK layer. The hold/unhold functionality has been aligned with the /app behavior to ensure consistent call control handling.

This change eliminates redundant SDK calls during hold/unhold actions, resulting in streamlined voice call processing and consistent behavior across the application.

Omni UI: *bom.ocir.io/bmvcldyxkwlg/omni-ui:6.9.16.20260312-R_281519*

- ***SL-18141 || (DCA20260222748708) 6x_Supervisor_Omni_voice_tabData_stuck***

Fixed an issue in Omni Supervisor Live Monitoring where monitoring data would intermittently stop refreshing. The problem occurred when a customer record had a null name, which caused a NullPointerException during runtime data calculation and stopped the monitoring timer job.

The fix adds proper null checks for customer name and chat client to prevent runtime exceptions. After the fix, the monitoring timer job continues to run normally and voice/chat status updates are reflected correctly in the Supervisor Omni monitoring dashboard.

Appserver Build: *bom.ocir.io/bmvcldyxkwlg/appserver:6.9.8.20260311-R_281105*

New Features & Enhancements

EN-1726 || In-House Number Masking – Extended Coverage to Interaction and Contacts APIs

Number masking was previously supported only on the Live Interaction and Callback screens. This release extends enforcement to the **Interaction Service** and **CFS (Customer Fetcher Service)** APIs, ensuring masked phone numbers are consistently returned across:

- **Closed Interaction Screen** – agents and supervisors no longer see unmasked numbers when reviewing past interactions
- **Contacts Screen** – registered and unregistered contacts are served with masked phone data
- **Chat Screens** – incoming chat interactions now apply masking correctly

When masking is enabled at the campaign level, the masked number is returned uniformly across all surfaces. Existing Live Interaction and Callback screens remain unaffected by this change.

EN-1041 || Lead Assignment API – External ID Enablement

ECC's Lead and User Assignment APIs previously operated exclusively on internal mapping IDs (`campaignLeadId` , `campaignUserId`), which were not visible in the UI and not discoverable by external CRM systems. This caused friction for customers building CRM integrations who had no way to reference these IDs programmatically.

The APIs now accept **UI-visible external IDs** (`leadId` , `userId`) as an alternative input path, with both IDs returned in the response. The enhancement covers:

- **Get All Leads for Process** – response now includes both `leadId` (UI-visible) and `internalLeadId`

- **Get Users Assigned to Lead in Campaign** – now accepts `leadId` as an optional query parameter
- **Assign Users to Lead** – request body now accepts `leadId` and `userId` in addition to internal IDs

The change is fully **backward-compatible** – existing integrations using internal IDs continue to work without modification. Mixing internal and external IDs in the same call returns a validation error.

EN-2666 || WebRTC Auto-Call State Management

Auto-Call is now correctly gated behind WebRTC connection status in OmniUI. Previously, agents could toggle or restore Auto-Call before WebRTC was in a registered state, causing inconsistent behavior especially after page reloads.

New behavior:

- The Auto-Call toggle remains **disabled** until the WebRTC client reports `registered`, with a tooltip informing the agent to wait until WebRTC is connected
- On **page reload or WebRTC re-initialization**, Auto-Call is automatically forced **Off** on the server
- Auto-Call is re-enabled only when the agent's WebRTC reconnects **and** the agent is confirmed **Available** (not on break or unavailable)
- Extension auto-selection after login/reload also follows the same availability guard

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EN-2340 || Role-Based Access Enforcement for /OmniAPP

The `/OmniAPP` (React UI) login page now enforces **role-based access control**, restricting entry to users with agent-facing roles only. Non-agent roles attempting to access `/OmniAPP` directly are blocked at the login stage and redirected appropriately. This reduces misconfiguration risk in deployments where multiple roles share the same environment.

EN-2101 || WebRTC Inbound Ringtone When Campaign Auto-Answer is Enabled

When using WebRTC for inbound voice with **campaign-level Auto-Answer enabled**, agents now hear the incoming ringtone for the full duration until the call is auto-answered. Previously, the ringtone was silent or intermittent in this scenario, reducing agent awareness of an incoming call. No configuration change is required.

Bug Fixes

Supervisor UAD 3.0 – Call Handling

- **Supervisor Workbench shows Mark Available screen** instead of the active call when conferencing from Live Monitoring while on break (EN-2198). Supervisor is now correctly placed into the call UI.
- **Agent unable to perform Transfer In Call** after Supervisor conferences from Live Monitoring – "Invalid CRT object id" error (EN-2193). Transfer now works correctly in three-party scenarios.
- **Supervisor Workbench shows telephony panel** instead of calling UI after returning via the "Switch to Workbench" popup on incoming/confer/transfer calls (EN-2157). The correct calling screen now loads.
- **Confer after hold** – conference failing after customer is placed on hold (EN-2013). Resolved.
- **Hold timer stuck at 1 second** for the conferenced member when the customer is already on hold (EN-2367). Timer now increments correctly.
- **Transfer-after-hold** – Customer and Agent2 disconnect events and WebRTC SDK hangup handling corrected (EN-1915, EN-1907).

Supervisor Live Monitoring

- **Null-safety guardrails** added across Omni and Voice monitoring calculators to prevent intermittent data drops caused by NullPointerExceptions in live agent monitoring (EN-

2277).

- **Unmasked number visible** in Supervisor Live Monitoring Waiting Calls when number masking is enabled (EN-2132). Masked number is now displayed consistently.

Voice & Call Handling

- **Agent-to-Agent Confer not completing** when the second agent has Auto-Call Off (SL-18313). Confer now connects in this scenario.
- **Post-conference audio persisting** after customer disconnects — agent-to-agent audio channel remained open, mic icon disappeared on both agents, and subsequent confer attempts failed until User2 logged out (EN-2663). Ghost audio session is now cleaned up correctly on customer disconnect.
- **Manual Preview Dialing** – UI remaining stuck on the Preview screen after dial timeout or force dial, not transitioning to the live interaction screen (EN-2173). Resolved.
- **Click-to-Dial from Closed Interaction tab fails** with 404 error on the Manual Dial Customer API (EN-2962). API resolution corrected.
- **CORS error on agent chat** preventing agents from sending or receiving messages (EN-2699, EN-2707). CORS handling corrected.
- **Chat transfer not completing** when the agent is on an active voice call (SL-18142). Transfer now completes correctly.
- **Calls disconnecting immediately** on agent answer before conversation could begin (EN-1200, SL-18280). Resolved.
- **Agent Default Landing page** corrected to the Interaction tab after a call ends; improved handling when the customer hangs up immediately after ACD routing (EN-2298, SL-18310).
- **ACD transition failure** when an exception occurs in the Resource Manager response, causing calls to be dropped from the routing queue (EN-2692). ACD now continues routing correctly.

Number Masking

- **Campaign-level Mask Privileges** (Manual Dial, Disposition, Voice Logs, Transfer, Confer) not being enforced for Omni Supervisor role in UAD 3.0 (EN-2104). Privileges now applied correctly.
- **System-level Mask Privileges** (Transfer, Confer, End Interaction) not being enforced for Omni Supervisor role in UAD 3.0 (EN-2103). Privileges now applied correctly.
- **Copying a phone number from Closed Interaction** only copied 3–4 digits instead of the full masked number (EN-2120). Full masked number now copied correctly.

Reports

- **SLA % formula inconsistency** between ACD Call Interval Summary and ACD Call Summary reports producing different results for the same time period (SL-18251). Formula aligned across both reports.
- **Agent Productivity Summary Report data inaccurate** – ACD and CSD events in the same batch were not processed correctly, causing missing APR calculations (EN-1127). Calculation corrected.
- **customer_id appearing as the same value** for multiple distinct phone numbers in the call_history table, causing data integrity issues for CRM reconciliation (SL-18300, EN-2422). Fixed.

Queue Monitoring – Superset Dashboard

Multiple improvements delivered for the Queue Monitoring Superset dashboard:

- **Live queue data not refreshing** in real time – data would get stuck and show stale values (EN-2401). Live data now streams correctly.
- **Historical data tooltips** displaying raw/default values instead of human-readable converted values on hover (EN-2402). Tooltips now show correct formatted values.
- **Process and Campaign filters** not context-aware – showing all entries regardless of the configured monitoring level (EN-2407). Filters now show only relevant options.
- **Channel filter** displayed only "Voice" with no practical use; removed to reduce UI clutter (EN-2408).

- **Edit Chart, View Query, and View Table** options from the graph menu opening blank pages or empty modals (EN-2412, EN-2413, EN-2414). All three now function correctly with correct data formatting.
- **Share option** hidden from chart menus as both sub-options are non-functional (EN-2419).

Salesforce Omni Toolbar

- **Customer list distorted** in View Customer Before Dial when more than 5 customers share the same phone number (EN-2350). List layout now correct regardless of customer count.
- **Hold timer not resuming** correctly after a browser reload during a hold call (EN-2392). Timer now resumes from the correct value.
- **Customer search, Link, and Unlink not working with custom objects** in Salesforce (EN-1540). Custom object lookup and association now function end-to-end.
- **Chat activity not recorded** in Salesforce after inbound/outbound chat dispose in an Omnified Campaign (EN-2661). Activity dump now written correctly on dispose.
- **Data dumping not working** for Lead, Case, Opportunity, and custom objects in Salesforce (EN-2668). Dump now succeeds for all supported CRM object types.
- **Advanced Search via Nodeflow** not executing on Omni Toolbar with Salesforce integration (EN-3026). Search now works end-to-end.

Platform

- **Session cookie growing too large**, causing WebSocket connection failures and degraded performance (EN-2236). Cookie size is now managed correctly.
- **Voice Transcription flag (** `isVoiceTranscriptionEnabled` **)** now read from server preference store in Data Engine. Transcription requests to Tasker are sent only when the flag is explicitly enabled. Cache eviction is now automatic when server preferences are updated, eliminating the need to restart Data Engine after configuration changes (EN-391).

Build Tags

Component	Build URL
Appserver	`bom.ocir.io/bmvcldyxkwlg/appserver:6.9.29.20260423-R_297746`
Appserver-ui	`bom.ocir.io/bmvcldyxkwlg/appserverui:6.9.2.20260429-R_299590`
Art	`bom.ocir.io/bmvcldyxkwlg/art:6.9.2.20260415-R_294247`
CCDP	`bom.ocir.io/bmvcldyxkwlg/ccdp:6.9.3.20260429-R_299549`
Chat-service	`bom.ocir.io/bmvcldyxkwlg/chat-service:6.9.5.20260424-R_298053`
CMS	`bom.ocir.io/bmvcldyxkwlg/cms:6.9.11.20260423-R_297386`
Customer-fetcher	`bom.ocir.io/bmvcldyxkwlg/cfs:6.9.7.20260413-R_293205`
Data-engine	`bom.ocir.io/bmvcldyxkwlg/dataengine:6.9.27.20260430-R_299972`
Interaction-service	`bom.ocir.io/bmvcldyxkwlg/interaction-service:6.9.4.20260415-R_294248`
Kafka-patch	`bom.ocir.io/bmvcldyxkwlg/kafka-patch:6.9.3.20260414-R_293764`
Patch	`bom.ocir.io/bmvcldyxkwlg/patch:6.9.9.20260430-R_300186`
Omni-UI	`bom.ocir.io/bmvcldyxkwlg/omni-ui:6.9.77.20260428-R_299076`

SL-103 / EN-3145 || Incoming ACD/Re-ACD Queue Call Handling – Delay in Call Connection to Agent

Issue: After completing a call, agents did not receive the incoming call popup for the next queued customer. The agent screen became unresponsive with a noticeable delay, leaving the customer's call connected but unanswered.

Fix: The agent interface now correctly presents the incoming call popup immediately after a call ends. Agents can respond to queued calls without delay or screen freeze. Verified for: Inbound, Manual Dial, Callback, Re-ACD, Call Transfer & Conference, Auto-Answer (On/Off), WebRTC, and Click-to-Dial.

Build Tags

Component	Build URL
Omni-UI	`bom.ocir.io/bmvcldyxkwlg/omni-ui:6.9.81.20260504-R_301080`

EN-3139 / EN-2181 / EN-3157 || Chat & Voice Stability Fixes

EN-3139 — WhatsApp Profile Name Sanitisation

Incoming WhatsApp chats from customers with special characters or unsupported formatting in their profile names were failing entirely, causing agents to never receive the messages. The system now sanitises all profile name formats, ensuring incoming chats are delivered without disruption.

EN-2181 — Bot Failure Response Handling

When a connected bot returned an error or non-200 response, internal XMF threads got stuck waiting indefinitely with no timeout or fallback, eventually making the messaging service unresponsive and requiring restarts. The system now handles bot error responses gracefully and resumes without intervention.

EN-3157 — Dial Completed Action Event Not Registered

When an agent rejected a campaign call, the system failed to register it as completed, leaving the call flow stalled and blocking re-routing and outcome logging. The system now correctly registers call completion on both acceptance and rejection. Verified for: Manual Dial, Inbound, Re-ACD, Auto-Answer (On/Off), Callback, and Click-to-Dial.

Build Tags

Component	Build URL
Chat-Service	`bom.ocir.io/bmvcldyxkwlg/chat-service:6.9.6.20260505-R_301211`
XMF	`bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework:6.9.4.20260505-R_301241`
Appserver	`bom.ocir.io/bmvcldyxkwlg/appserver:6.9.30.20260504-R_300944`

Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels or reach out to your Customer Success Manager.

22.3. 6.8 Release Notes

22.3.1. Contact Center - Patch Release Notes 6.8.8

Release Details

Release Date: 2-Feb-2026

Release Details

This patch release for version **6.8.8** introduces significant enhancements to the **Omni User Interface (UI)**, improves backend scalability through **sharding**, and strengthens administrative security with a new **Critical Alerts Framework**. Key updates also include improved **4.x to 6.x compatibility** for CRM and Knowledge Base integrations, and critical fixes for **call transfer bridge integrity**

Build and Version Info

The following table outlines the component builds included in this release.

Note: Bold entries indicate changes in this specific patch cycle

Component	Build URL
amf	bom.ocir.io/bmvcldyxkwlg/amf:6.7.6.20250721-R_54847
appserver	**bom.ocir.io/bmvcldyxkwlg/appserver:6.8.43.20260129-R_264004**
appserver-ui	**bom.ocir.io/bmvcldyxkwlg/appserverui:6.8.12.20260120-R_261092**
applite	ExoApplite-6.4.1.20240801-R_153309.exe
art	**bom.ocir.io/bmvcldyxkwlg/art:6.8.13.20260121-R_261224**
art-dbquery	NA
asrouting	**bom.ocir.io/bmvcldyxkwlg/asrouting:6.8.17.20260120-R_261079**
chat-service	**bom.ocir.io/bmvcldyxkwlg/chat-service:6.8.22.20260120-R_261087**
citus-patch	**bom.ocir.io/bmvcldyxkwlg/citus-patch:6.8.18.20260120-R_261089**
cms	**bom.ocir.io/bmvcldyxkwlg/cms:6.8.30.20260130-R_264674**
cms-dbquery	NA
crm-connector	**bom.ocir.io/bmvcldyxkwlg/crm-connector:6.8.18.20260120-R_261085**
customer-fetcher	**bom.ocir.io/bmvcldyxkwlg/cfs:6.8.20.20260120-R_261078**
data-engine	**bom.ocir.io/bmvcldyxkwlg/dataengine:6.8.34.20260120-R_261083**
eureka	**bom.ocir.io/bmvcldyxkwlg/eureka:6.8.17.20260120-R_261084**
exoxtrm-ingress	NA
fluent-bit	bom.ocir.io/bmvcldyxkwlg/fluent-bit:100.0.14.20241213-R_171818 -not found
fluentd	bom.ocir.io/bmvcldyxkwlg/fluentd-central-logger:100.0.13.20241213-R_171815
gateway	**bom.ocir.io/bmvcldyxkwlg/gateway:6.8.17.20260120-R_261081**
ingress-nginix-controller	NA

Component	Build URL
init	NA
init-exoxtrmutils	NA
interaction-service	**bom.ocir.io/bmvcldyxkwlg/interaction-service:6.8.23.20260120-R_261086**
k8tz	NA
kafka-patch	**bom.ocir.io/bmvcldyxkwlg/kafka-patch:6.8.18.20260120-R_261088**
logrotate(NA)	bom.ocir.io/bmvcldyxkwlg/logrotate:6.0.14.20241126-R_169000
node-logcleanup	bom.ocir.io/bmvcldyxkwlg/logcleanup-k8s-node:6.0.17.20241226-R_174107
postgres	NA
postgres-operator	NA
postgresql	v14
Citus version	v14
scheduler	**bom.ocir.io/bmvcldyxkwlg/scheduler:6.8.17.20260120-R_261082**
vault	NA
zabbix-server	zabbix-server: 7.2.0
zabbix-agent	zabbix-agent2: 7.2.0
patch	**bom.ocir.io/bmvcldyxkwlg/patch:6.8.31.20260130-R_264396**
Kafka	kafka-2.13-3.4.1_1.x86_64.rpm
Redis	bom.ocir.io/bmvcldyxkwlg/redis-with-modules:8.2.3
Kafka-connect	bom.ocir.io/bmvcldyxkwlg/kafka-connect:v1
ksqldb(NA)	confluentinc/cp-ksqldb-server:latest
schema-registry	docker.io/bitnami/schema-registry:7.8.0-debian-12-r2
XMF	**bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework:6.8.21.20260130-R_264676**

Component	Build URL
CCDP	**bom.ocir.io/bmvcldyxkwlg/ccdp:6.8.17.20260120-R_261096**
CQA	**bom.ocir.io/bmvcldyxkwlg/cqa:6.8.18.20260120-R_261094**
omni-ui	**bom.ocir.io/bmvcldyxkwlg/omni-ui:6.8.90.20260131-R_264885**

Features Enhancements

- **Provide option to Agents to try new Omni User Interface (EN-66):**

Agents using the traditional GWT interface can now opt-in to the **New Agent Workspace** if their selected campaigns are Omni-compatible.

- **Benefit:** Allows agents to transition to a modern UI (new Omni UI (Beta)) at their own pace without functional disruption.

  Current Scope & Limitations:

  - Applicable to **4x and 6x GWT** login flow
  - **Inbound use cases only** supported in this phase
  - **Outbound/Dialer interactions** may appear but are **not fully supported** in Omni UI

  Configuration Flag:

  enableOmniNextExperience = true

  (Stored in server_preference_store at contactCenter level)

Document Link (Internal)

- **Implement Off-DOM Iframe Caching for Event Propagation Across Multiple Interactions (EN-302):**

Iframes retain their state and active event registrations across interaction changes, panel switches, and navigation between different tabs and apps

Known Issue: SDK events currently propagate across interactions in the debugger; this has been reported for investigation.

- **CCDP & CQA citus Sharding (EN-350):**

This update optimizes the **CCDP (Conversation Context & Data Platform)** to align with the **Citus sharding strategy**, enhancing system scalability and data consistency.

- **System Streamlining:** CQA has been decoupled and is no longer utilized on the ECC side, leaving CCDP as the primary component for distributed data management.
- **Performance Stability:** CCDP tables are now patched for sharding without impacting existing interaction summaries or downstream processes.
- **Reliability:** Post-deployment validation shows zero regressions or data inconsistencies, ensuring all interaction flows function as expected.

- **isTranscriptVoiceEnable Server preference store (EN-391):**

This update introduces a server preference flag (isVoiceTranscriptionEnabled) providing granular control over call recording transcriptions.

- **Cost & Resource Efficiency:** The Data Engine now triggers transcription requests to Tasker only when this flag is active, eliminating unnecessary processing.
- **Real-Time Configuration:** Cache eviction is now fully automated. When settings change, CMS publishes an event that the Data Engine listens to, refreshing the cache instantly.
- **Zero Downtime:** This automation removes the requirement for a Data Engine restart to apply new server preference configurations
- **Document links (Internal):**
  Link
- **Link**

- **Dialer with Interaction service in backend 4.x (EN-147):**

Starting from **v6.8.7**, the **Interaction Service** now manages interaction creation for auto-dial calls across both **6x** and **4x → 6x (Harmony mode)** flows.

Scope & Capabilities:

- **Expanded Support:** Supports interaction creation for auto-dial calls in the **6x UI** (controlled via a dedicated server preference flag) and **4x → 6x** flow using existing isHarmonyMode() flag
- **Preview Dialer Integration:** For Preview Dialing, an interaction record is generated as soon as the agent accepts and initiates the call.
- **Data Downstream:** Captured interaction data is fully accessible for subsequent workflows and reporting.

Key Limitations:

- **Preview Dialer:** Interactions are not created if a call is rejected directly from the preview popup.
- Interaction creation depends on:
  - Correct configuration of **server preference flags**
  - Valid call_id availability during interaction updates
- Behavior for other dialer types (e.g., **predictive dialer**) follows existing logic and is **not changed**
- This feature focuses only on **interaction creation**; reporting and analytics validation is out of scope.

  Document Link (Internal)

- **Dialer with Interaction service in backend 4.x & 6x oubound voice campaign || Dialer in Omni UAD (EN-161) (EN-184):**
  Interaction creation is now enabled for **Auto-Dial calls** across both 6.x and 4.x–6.x environments.
- **6.x Configuration:** A dedicated configuration flag has been introduced to give administrators specific control over this behavior in the 6.x environment.
- **4.x–6.x Integration:** the system leverages the existing isHarmonyMode() flag to trigger interaction creation.
- **Known Issue:** Users may notice that the "Preview" option disappears from the Interaction tab if they navigate to any other tab besides "Interaction" (**Ref: EN-755**)

- **Restrict Default IVR for Transfer for campaign in /app (EN-246):**

This update addresses the issue where the "Default IVR" option was previously visible to agents during all call transfers, regardless of the campaign type. This visibility often led to accidental or incorrect selections by agents.

- **Precise UI Controls:** A new server preference flag, addDefaultIvrFeatureContextsForCampaign, has been introduced to manage the visibility of the Default IVR option.
- **Default Behavior:** The Default IVR remains visible for inbound campaign transfers unless it is specifically disabled through configuration.
- **Flexible Configuration:** Administrators can set this flag at the Contact Center (CC) level for global application or at the individual campaign level.
- **Override Logic:** Campaign-level settings take priority and will override any global CC-level configurations.
- **Operational Stability:** This change only affects the IVR list displayed in the UI; core call transfer and routing functionalities remain completely unchanged.
- **Documentation Link (Internal)**

- **Critical Admin Alerts for High-Impact Actions (EN-143):**

This feature introduces a **platform-wide Critical Alerts Framework** to prevent accidental execution of **irreversible admin actions**. For destructive operations (such as deleting processes, campaigns, users, routing rules, or media resources), admins are shown a **mandatory warning modal** followed by **password re-authentication** before the action can proceed.

The framework is **reusable and consistent across 4x, 6x, Omni, Voicebot, and Chatbot**, with all critical actions **validated at both UI and backend levels** and **fully audit-logged**. This improves system safety, reduces misconfigurations and outages, and enhances traceability of high-risk administrative actions.

- **Noise suppression on GWT webrtc sdk (EN-290):**

This spike introduces **basic noise cancellation for agent audio on the GWT UI**, enabled automatically via a **backend configuration** with **no UI changes or agent actions required**. When enabled, outgoing agent audio uses lightweight noise suppression while preserving existing WebRTC behavior, with a safe fallback to default audio if unsupported.

Configuration Flag:

- A new flag **disableWebrtcNoiseSuppression** is introduced in the **server_preference_stor**e at **contactCenter level**.
- Setting the value to **false** enables noise suppression.

Current Scope & Limitations:

- Supported only on **4x and 6x GWT (WebRTC) UI**
- **Not supported** on 4x Voice Toolbar, 6x Voice Toolbar, 4x→6x React UI, or **6x Omni React UI**
- No agent-level toggle or UI control
- No impact on existing WebRTC call flows

- **4.x AppSDK support in Omni UAD (EN-178):**

This feature enables **agents logged into 6x Omni UI to access apps configured for their 4x campaigns** by mapping 4x app locations to corresponding 6x Omni UI slots.

Location Mapping:

- Workbench Sidebar (4x) → Right Bar (6x)
- TopBar Global (4x) → Left Panel (6x)
- WorkbenchInternal Tab (4x) → Right Bar (6x)
- Background App (4x) → Right Panel (6x, shown as 1px × 1px)

Scope & Limitations:

- Applicable **only for Agent persona apps**
- Admin/Supervisor apps are **out of scope**
- Background apps are **not natively supported** in Omni UI; temporarily rendered in the Right Panel

- Partial app support; several apps are **not picked, blocked, or deferred**
- At least **one 4x SDK API and event** must be verified as part of validation.

Notes:
1. Agent-persona apps were tested. **Dial User App** and **Voice Log Privilege App** are **not delivering**.

2. Currently delivering apps are **Agent Self-Monitoring**, **Pick Call App**, **Notification App**, and **Missed Call App**.

3. Validation performed using **4x SDK (API & event)**.

Document **Link** (Internal)

- **KB URL Support in 6x for 4x customer - 4.x and 6.x both (EN-63):**

Harmony 6x now supports a **configurable landing page** to enable **Knowledge Base (KB) integration for 4x customers**. Based on tenant-level configuration, the landing page can load either the **Knowledge Base (embedded via iframe with SSO and required query parameters)** or a **Superset Dashboard**, while maintaining backward compatibility for 6x customers.

If no configuration is applied, **Knowledge Base is shown as the default landing page**.

Note:
1. Landing page behavior is driven by the end_interaction_landing_page flag
2. **Default behavior:** KB is loaded when no flag is configured

Document Link (Internal)

- **CRM Integration Sync (4x → 6x) (EN-67):**

CRM configuration from **4x is automatically detected and synced to 6x**, ensuring agents get the **same CRM-first experience** post-migration. The CRM loads as an **iframe tab**, auto-focused for 4x tenants, with **all 4x parameters, sandbox settings, and static DB configs preserved**. Call flow, customer save, and disposition work as expected.

Flags Used:

- shouldSandBoxCRMIframe = true → applies sandbox attributes to CRM iframe
- addCustomerInfoToCRMUrl = true → passes customer/context details in CRM URL

Current Scope & Limitations:

- Applicable only to **4x-migrated tenants**
- **Masking flag not tested** (out of scope)
- Graceful fallback if CRM config is missing
- Future enhancements may allow role/campaign-based default tab control

Document Link (Internal)

- **OmniApp || Interaction Timeline Capture with 4.x Appserver and Interaction Service (EN-9):**

The Interaction Timeline will capture all activities from the 4.x Appserver and push them to the Interaction Service, which manages both open and closed timelines with full lifecycle tracking. Data integrity, correct Interaction ID mapping, chronological order, and reliable delivery are ensured.

- **Interaction service 403 (EN-355):**

An intermittent **403 error** was observed in the Interaction Service when switching between **4.x and 6.x agent logins** while accessing the **Closed Interactions UI**. The issue occurred due to **cache data mismatch**, where stale or mixed cache entries were not cleared correctly between user sessions, causing interaction APIs to fail with authorization errors.

The issue has now been **fixed by correcting cache handling and session isolation**, ensuring that interaction APIs respond correctly regardless of prior login context. Validation confirms the issue is resolved and no further occurrences were observed.

- **Call Transfer Bridge Issue - Customer Leg Incorrectly Removed When First Agent Disposes Call (EN-345):**

During call transfers where, after a call was transferred to another campaign, disposing the call by the first agent incorrectly removed the **customer leg from the bridge**. This resulted in

loss of communication between the customer and the second agent who had already received the transferred call.

The issue has been fixed to ensure that **only the transferring agent's leg is disconnected upon disposal**, while the **customer remains connected with the second agent**. Bridge integrity is now correctly maintained throughout the call transfer flow.

- **API for AccountDB creation for new services (EN-243):**

Current Behaviour (Up to 6.8.6)

- Account-based databases were created **only when a new Contact Center was created**.
- When onboarding a **new service** in the **4.x ↔ 6.x architecture** for **existing accounts**, the required account-based databases were **not created automatically**.
- As a result, the account-based database was created **only during new Contact Center creation**, not during service onboarding for existing accounts.

New Behaviour (From 6.8.7 Onwards)

- When onboarding any **new service**, the system now ensures that **account-based databases are created for existing accounts as well**, if they do not already exist.
- This guarantees database availability and consistency across all services in the **4.x ↔ 6.x architecture**, regardless of whether the Contact Center is newly created or pre-existing.
- **Database Naming Convention**

  Associated databases are created using the following format:
  <dbname>_<ccname-with-unique-id>_<accountid>

- **Examples:**
  - interaction_db_mohit_cc4b4a7e7a_fu1rkhrmrib1fbfy
  - Data_db_mohit_cc4b4a7e7a_fu1rkhrmrib1fbfy

- **CMS Redirection to 4x appserver (EN-170):**

A new feature has been introduced to enable seamless compatibility between **4.x applications and the 6.x UI (UAD 3.0)**. With this enhancement, the **CMS /app/locationInfo/appsInLocations API** now intelligently redirects requests to the **4.x Appserver** when a 4.x user logs in via the 6.x UI.

This feature ensures:

- Automatic redirection of CMS requests to the **4.x Appserver** for 4.x users.
- Accurate retrieval and rendering of **4.x app configurations** within the 6.x UI.
- Smooth access to existing 4.x configured applications without any reconfiguration.

Supported Slot Mapping (4.x → 6.x)

- **Workbench Sidebar (4.x) → Right Bar (6.x)**
- **TopBar Global (4.x) → Left Panel (6.x)**
- **Workbench Internal Tab (4.x) → Right Bar (6.x)**
- **Background App (4.x) → Right Panel (6.x)**

This feature enables configured 4.x applications to open successfully in **UAD 3.0**, improving backward compatibility and ensuring a consistent agent experience.

- **OmniUI: Implement Iframe Persistence for Left Panel Apps and Superset Dashboard (EN-159):**

As an agent using the **OmniNext UI**, iframes in **Left Panel Apps, Knowledge Base, and Superset Dashboard** now maintain their state and avoid reloading when navigating between different sections. This enables seamless workflow continuity without losing context or waiting for iframe reloads.

Verified Persistence Areas

- Knowledge Base page
- Home page (Superset Dashboard – 6x)
- Interaction tab (apps shown during **active interactions** in the right panel)

Note

1. In both **4x and 6x**, iframe persistence is **not supported for View Customer / Preview Dial** on the Interaction tab.
2. Persistence is applicable **only during active interactions**, as discussed with the team.

- **Ability to connect with CCDP APIs from APP SDK (EN-292):**

From **v6.8.8**, the **APP SDK** now supports connectivity with **CCDP Microservice APIs**, enabling SDK developers to consume and exchange **conversation insights and intents** directly from CCDP for use within apps.

What's Enabled

- CCDP added as a supported microservice in invokeECCApi
- Support for **GET** and **POST** CCDP APIs via Omni SDK
- Enables publishing interaction events and fetching customer journeys
- Works via Omni Toolbar (Harmony CX Platform) and 6x Debugger App

Outcome

- App developers can seamlessly integrate CCDP data into their applications using the existing SDK framework.

Document Link (Internal)

- **Dumping of aq_user and campaign_user ready and autocall history tables on data engine (GA-18):**

From **v6.8.7**, dumping of **agent and campaign ready/autocall history tables** to **Appserver and Data Engine** is now **flag-controlled** to address data lag issues observed earlier.

What's Improved

- Eliminates multi-day lag in history tables on Data Engine
- Enables or disables dumping independently on **Appserver** and **Data Engine**
- Applies to the following tables:
    - aq_user_ready_history
    - aq_user_autocall_history

- campaign_user_ready_history
- campaign_user_autocall_history

Outcome

- Better control, reliability, and consistency of historical data
- Supports flexible configuration based on operational needs

Document Link (Internal)

- **Impl of retention in all the KTables using new approach(Part 1) (GA-116)** :
- **Impl of retention in all the KTables using new approach(Part 2) (GA-117)**:

This release introduces a new data processing approach to handle joins between two windowed datasets and persist the results in PostgreSQL. The enhancement ensures reliable data storage, improved consistency, and better control over data retention.

Depending on the configuration, the system either joins the datasets at the streaming layer before storing them in PostgreSQL or stores the source data first and performs the join within PostgreSQL. This improvement enhances data availability, supports accurate reporting, and improves overall system stability.

- **AMCC and Voicebot (EN-201) (EN-21):**

Enabling agents to monitor VoiceBot interactions effectively, starting from an adaptive login and role-selection flow to an intentional transition into active monitoring. It introduces a unified Agent Workbench where monitoring agents can view prioritized VoiceBot conversations, receive critical preparatory alerts, and act with full context. Real-time SOP-driven metrics and a detailed interaction view empower agents to analyze live bot conversations and intervene when required. Seamless takeover ensures a smooth, invisible handoff from bot to human during high-risk scenarios. Together, these capabilities create a proactive, scalable VoiceBot monitoring experience that blends automation with timely human intervention.

Note: This will be delivered with a limited scope. For more details, please refer to the card **EN-201**

- **Immediate Cache Expiry on 6.x service When configuration changes happen in 4.x (EN-327):**

With this update, the services will continue to fetch configuration data from the cache as long as no changes are made on the 4.x side. Whenever a configuration change occurs—such as adding or deleting processes, campaigns, or users—the next API call will automatically fetch the latest configuration data. The updated data is then loaded into the cache and used for subsequent requests.

Tech Tasks

- **GA-66 / GA-71 Kafka version upgrade VM**

As of now, the client-side Spring Kafka library does not have a stable release for Kafka client v4.1.1. As mentioned in the official documentation, older Kafka client versions can communicate with newer Kafka brokers/servers by negotiating a common schema version through API versioning [https://kafka.apache.org/protocol.html#protocol_compatibility].

Therefore, this release only upgrades the Kafka broker to version 4.1.1.

Security Fixes

- **GA-55 ||Critical severity fixes for CRM-Connector**

This includes **package upgrades** for the CRM Connector to fix security vulnerabilities, including Tomcat and related dependencies, **without upgrading Spring Boot**.

Scope:

- Secure package upgrades to address vulnerabilities.
- Core CRM functionalities verified:
  - Fetch all contact lists
  - Create and update contacts
  - Sync between remote CRM and local system
  - Customer view before dial

Benchmarking

- **NA**

Debugging Docs / SOPs

- **NA**

Monitoring Task

- **NA**

Limitations and known facts/Issues with features/fixes

- EN-142448 | For inbound calls, the popup for multiple customers does not appear in toolbar
- GA-14838 | filterable and searchable columns shown three times in preview alternate number list
- GA-14853| Create and Dial is not supported in toolbar in duplicate customer feature support story
- GA-14022 || AddCustomerInfoToCRMUrl this flag is working only at system level only.
- EN-142553| EN-140238 |SAML is not supported with omni toolbar
- GA-14884 | Bell Notification Not displayed after Churn | Preprod setup
- GA-14882 |Toolbar || Sometimes during manual dial we are facing issue : invalid number
- GA-14851 | Duplicate customer handling || Mouse is shown on preview customer screen (arrow shown)
- GA-14843 | The Call Details screen under the Manage tab on the Supervisor interface is distorted

- GA-14842 |Transfer to user/Confer to user : Not able to select queue in queuelist
- GA-14841 | Transfer to user/Confer to user : Queuelist shown if we are going to click on campaign option
- GA-14534 | Blacklist feature || Number is only blocked if we add the zero before the number
- GA-14933 | Data is not updating in campaign_customer table after the call disposed thats why same number is dialable infinity time || Third party masking setup is down
- GA-14932 | Create and dial : customer has been created successfully but calling is not working|| third party masking setup is down
- GA-14935 | dial time Restriction setting at campaign level:dial time is not updating in campaign_customer table for the already customer
- GA-14937 | User-disposition-retry setting enabled after call disposed || campaign_customer table should be updated based on setting|| issue : changes are not reflecting
- GA-14958 | Confer Call Icon Persists After Agent Ends Conference
- GA-14956 |Supervisor Can Force Logout Agent Without Providing a Reason
- GA-15107 | During force login the 1st user doesn't get logout properly GA-15107 - Fix Not Received
- GA-15100 | Create a flag to persist error records in DB for lead upload
- GA-15053 | Bulk User Upload: Users face issues during upload if the column names or their sequence are changed in the downloaded CSV file, even after mapping the columns correctly during upload.
- GA-15098 | Non-Dialable | Not working with callback
- GA-14935 | dial time Restriction setting at campaign level:dial time is not updating in campaign_customer table for the already customer
- EN-132681 | Excluded disposition feature is not working on supervisor under manage contacts
- EN-141977 || Disabled Filter At System Level Is Working
- EN-140367 || A filter created at the system level and not assigned to a campaign is still applied to all campaigns (legacy)

- GA-15223 |Callback upload from Supervisor: During upload, if is_self_callback is false, then the userId being passed should be bypassed instead of failing due to a user ID mismatch
- GA-15224| Callback failure logs are not available in the app server logs to identify why the calls failed
- GA-15235 | Callback initiate story (EN-142572) || Callback is not initiated if agent is logged in and agent is on break || Campaign callback
- EN-145356 |Agent screen || Complete Contacts data-column are not shown everywhere in contacts tab , in live interactions
- EN-145173 |MultiCCManager ||Click on contact tab||Reverting on main login screen||Not able to work on contacts tab from multiccmanager
- EN-145660 || "Abandon At ACD" data not dumping for Chat Queues when no agent is logged in || Queue Monitoring
- EN-145484 || Closed Interactions|| Search field not working with Customer Name
- GA-15313 ||Customer searching issue || Serachable column "name" splitted into two if we providing the name with space
- EN-146524 || Contacts tab on admin and supervisor || bulk upload || complete data columns fields are not shown for mapping
- EN-146522 || Messenger: mp3 and mp4 format support issue
- GA-15303 || Whatsapp and messenger not tested in same campaign whatsapp with XMF || Chat_toolbar_info configured on the basis of queue|| Unable to initate the whatsapp outbound chat as whatsapp business number option is not showing on UI|| due to this unable to test whatsapp and messenger in same campaign
- https://jira.ameyo.com:8999/browse/GA-15302 ||Storage Azure||Transcript failed to send on azure if we are trying to send multiple attachement at a time from agent
- HR-609 OutBound Chat Summery is not Generated.
- HR-604 Past interaction count and list are not showing when the CCDP flag is enabled.
- HR-658 || In a few conversations, the Intent heading is not being generated correctly based on the interaction conversation
- HR-642 || Case Id Not getting Updated in Journey.

- HR-640 || A meaningful chat summary was not generated based on the agent and customer conversation.
- HR-633 || Summary sentiment does not match the interaction sentiment.
- HR-614 || CQA scoring is sometimes not showing in the Closed Interaction tab under the Quality Profile Score column.
- HR-616 || CQA AI scoring should not be analyzed for unattended chats.
- HR-631 || For all calls, the Supervisor user should be able to perform manual scoring, whether AI scoring is conducted or not
- HR-646 || The screen is getting blank after creating a duplicate Quality Profile. After switching tabs, the screen is getting refreshed.
- HR-630 || When AI Analysis is disabled, those Quality Profile options should not appear on the AI Audit screen.
- HR-629 || When Tasker is down CQA score is showing 'No Score Selected'
- HR-628 || Quality Profile Assignment/Quality Profile Creation option is showing twice on screen
- HR-613 || The supervisor is unable to save CQA manual scoring with comments.
- EN-147340 || Messages Not Exchanged Between Agent and Customer After Reload During Ongoing Chat
- GA-15474 || Negative UDH Wrap Time Dumped in omni_interaction_denormalised_interval_5_min for Auto-Transferred Chats
- GA-15421||whatsapp inbound chat ||customer name is not saving if performing inbound whatsapp chat
- GA-15503|| Call Details Report || masking campaign || Getting a blank report if we run the report with a phone filter either passing the mask number or unmask number.
- GA-15452|| UDH dumping issue with voice campaign and omni campaignGA-47|| Agents are force-logged out and everything looks fine from the Ameyo DB side, as the logout time and reason are correctly recorded. However, in Live Monitoring it still shows in right side but not on left side .
- GA-110 || Omni Loosely coupled || customer creation failing for newly created process
- GA-53 || Contact and Cases Not Displayed in CRM Integration Tab || Omni

- GA-155 || Not Getting Correct Graph And Data In Omni Live Monitoring
- GA-94||Auto Call On/Off data points are incorrect
- https://exotel.atlassian.net/browse/GSystem Disposition Incorrectly Displayed as "Connected" When Agent Is Force Logged Out During Ringing StateA-230||
- https://jira.ameyo.com:8999/browse/GA-15634 ||Not showing the rows per page selection option on call history page in 6.x , While it was available previously For all User Roles
  Reason :This is to intentionally hide it, to implement CQA and CCDP flow.

Customer Reported and Legacy Bugs Fix

System Common Bugs

- NA

Monitoring Data and Reports

- **Encrypted Report Data in the Email attachment of Scheduled Reports (SL-17840):**

  Issue
  In setups where **BYOK (Bring Your Own Key)** was enabled, scheduled reports sent via **Email** were delivered as **encrypted attachments**, making them unreadable to users. While the report data displayed correctly in decrypted form on the UI, the email scheduler was attaching the encrypted report output files directly, leading to a mismatch between UI and emailed reports.

  Fix:
  This issue has been resolved by ensuring that scheduled report files are **properly decrypted before being attached to emails**. Reports sent via Email are now readable and consistent with the data shown on the UI.

- **Current Behavior After Fix:**

  Email Scheduler:

  - CSV, XLS, PDF → Decrypted and readable

  FTP / SFTP:

- CSV → Decrypted and readable
- XLS, PDF → Encrypted (tracked separately)

Resolved issue on mail with pdf,xls and csv format but on FTP and SFTP getting encrypted data for xls and pdf files and decrypted in csv format . Separate issue open **EN-852.**

Omni Campaign - Voice and Chat Interactions

- **Optimization on Omni UI for select campaign API and autoSelectExtension API (SL-17896):**

Issue:
Agents intermittently encountered **Manual Dial API failures** during login or call initiation. The issue occurred during agent login, **selectCampaign** and **autoSelectExtension** APIs that were triggered **multiple times in parallel**, creating a **race condition**. This resulted in incomplete initialization of required **listener/cache data (VoiceCampaign / CRT objects)**, causing the manual dial flow to fail.

Fix:

- Ensured **selectCampaign API is invoked only once**, irrespective of single/multiple/default campaign assignments.
- Controlled **autoSelectExtension API calls** to prevent redundant execution before required data initialization completes.
- This eliminated the race condition and stabilized manual dial behavior.

Browser Version

Version 143.0.7499.170 (Official Build) (arm64)

Hot Fixes

6th february 2026

- **SL-18043 || (DCA20260201739922) 6x || whatsapp | Web || the number is stuck or chat goes in inconsistent state**

The following issues related to WhatsApp chat inconsistencies have been fixed in this:

1. Fixed an issue where outbound manual chat showed “already in chat with customer” when auto-call was disabled.
2. Resolved the problem of customer numbers getting stuck due to special characters (emojis, Arabic, italic characters) in WhatsApp profile names, which caused JID creation failures.
3. Addressed the “chat room not found” exception by improving exception handling for stale sessions to ensure a new chat room is created when required.

Appserver: bom.ocir.io/bmvcldyxkwlg/appserver:6.8.45.20260206-R_268518

Chat-Service: bom.ocir.io/bmvcldyxkwlg/chat-service:6.8.25.20260205-R_267672

XMF : bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework:6.8.22.20260204-R_267553

- **SL-17972 || (DCA20260118734040) 6x | Agent UI stuck || unable to dispose the call**

Fix:

A preventive fix has been implemented for the issue where the Agent UI got stuck and the agent was unable to dispose the call.

As part of this change:

- The Logout button is now enabled even during an ongoing interaction.
- A confirmation modal is displayed when the agent clicks Logout.
- On proceeding, the system first triggers the sendErrorLogs API and then the userLogout API.
- The agent is logged out successfully even if the error log API fails.

Omni-UI: bom.ocir.io/bmvcldyxkwlg/omni-ui:6.8.91.20260204-R_267178

Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels or reach out to your Customer Success Manager.

22.3.2. Contact Center - Patch Release Notes 6.8.6

Release Details

Release Date: 18-12-2025

Highlights / Release Summary

This release focuses on platform stability and infrastructure improvements. The key highlight is the upgrade of Redis to version 8.2.3 to enhance system reliability. The release also addresses critical bugs in Voice recording reconciliation, Omni-channel interactions (WhatsApp, WebRTC), and Reporting statistics.

Build and Version Info

The following components have been updated for this release:

Component	Build URL
appserver	**bom.ocir.io/bmvcldyxkwlg/appserver:6.8.33.20251217-R_250472**
appserver-ui	**bom.ocir.io/bmvcldyxkwlg/appserverui:6.8.11.20251217-R_250402**
art	**bom.ocir.io/bmvcldyxkwlg/art:6.8.12.20251217-R_250400**
asrouting	**bom.ocir.io/bmvcldyxkwlg/asrouting:6.8.15.20251217-R_250390**
chat-service	**bom.ocir.io/bmvcldyxkwlg/chat-service:6.8.18.20251217-R_250397**
citus-patch	**bom.ocir.io/bmvcldyxkwlg/citus-patch:6.8.15.20251217-R_250399**
cms	**bom.ocir.io/bmvcldyxkwlg/cms:6.8.20.20251217-R_250388**
crm-connector	**bom.ocir.io/bmvcldyxkwlg/crm-connector:6.8.16.20251217-R_250395**
customer-fetcher	**bom.ocir.io/bmvcldyxkwlg/cfs:6.8.18.20251217-R_250389**
data-engine	**bom.ocir.io/bmvcldyxkwlg/dataengine:6.8.30.20251217-R_250393**
eureka	**bom.ocir.io/bmvcldyxkwlg/eureka:6.8.15.20251217-R_250394**
gateway	**bom.ocir.io/bmvcldyxkwlg/gateway:6.8.15.20251217-R_250391**
interaction-service	**bom.ocir.io/bmvcldyxkwlg/interaction-service:6.8.21.20251217-R_250396**
kafka-patch	**bom.ocir.io/bmvcldyxkwlg/kafka-patch:6.8.15.20251217-R_250398**
scheduler	**bom.ocir.io/bmvcldyxkwlg/scheduler:6.8.15.20251217-R_250392**
patch	**bom.ocir.io/bmvcldyxkwlg/patch:6.8.25.20251217-R_250467**
XMF	**bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework:6.8.17.20251217-R_250502**
CCDP	**bom.ocir.io/bmvcldyxkwlg/ccdp:6.8.15.20251217-R_250493**
CQA	**bom.ocir.io/bmvcldyxkwlg/cqa:6.8.15.20251217-R_250404**
omni-ui	**bom.ocir.io/bmvcldyxkwlg/omni-ui:6.8.52.20251217-R_250403**

Note - Only the components listed with changes are shown above; others remain as delivered in the previous patch cycle

Security and Infrastructure Updates

- **Redis Upgrade (GA-64):**
- **Issues:** The existing system was running on an older Redis version, which required an upgrade to ensure better stability, reliability, and compatibility with the latest platform component
- **Fix:** Redis has been successfully upgraded to version 8.2.3. After the upgrade, all related services were restarted to ensure proper initialization. The system now runs smoothly with improved stability, and all monitoring, dashboard, and failover scenarios are working as expected.
    - *Upgrade Note:* After upgrading Redis, the **Data Engine** and **CFS pods** must be restarted to ensure Redis indexes and keys are populated correctly during initialization.

Bug Fixes

Voice & Recording

- **Recording Reconciliation (SL-17652) (DCA20251016694322):** Fixed an issue where calls were recorded with talk time even if the agent was force-logged out before the connection was established. The system now correctly records zero talk time for unconnected calls, ensuring accurate reconciliation.
- **Recording Uploads (GA-49):** Addressed upload failures caused by Kafka lag by modifying the webhook URL to include metadata (phone numbers, user details) as query parameters. This removes the dependency on call history event processing for uploads.
    - Note: The team must validate query parameter length limits with LP and ensure the upload endpoint can extract and use metadata directly from the URL without any database lookups.
- **Token is revoked and JWT Token Expire issue (SL-17249 (DCA20250627648610):** The issue is due to local storage getting full leading to QuotaExceededError due to which token is not set in localStorage hence not synced across tabs.

Omni-Channel & WebRTC

- **Customer Details on Search (SL-17844):** Resolved a defect where searching for a customer by name attribute before dialing failed to display customer information. The system now correctly processes contact-attribute–based searches, ensuring details are fetched and displayed accurately for names, IDs, or other configured attributes.
- **Supervisor Call Details Visibility (SL-17835):** Addressed an issue where call details would sometimes fail to load on the Supervisor screen. The system has been improved to ensure core call details remain visible to supervisors even if secondary services (like call quality analysis) are temporarily unavailable.
- **WhatsApp/Exotel Connection Stability (SL-17700):** Investigated intermittent XMPP connection failures where agents received chat requests but could not respond after extended idle periods. Monitoring and handling of connection states have been improved to reduce instances of "ghost" chats and unresponsive sessions.
- **WhatsApp Message Delivery (SL-17759):** Fixed an issue where incoming WhatsApp messages (specifically in integrations with Cogno bot) were not being received by agents. This was caused by missing description handling in XMF, which has now been rectified to ensure reliable message delivery.
- **WebRTC Connection Persistence (SL-17724):** Fixed a critical issue where WebSocket connections failed to re-establish after an agent logged out and back in. Connections now correctly reset and re-establish upon login, ensuring agents can immediately receive or initiate calls without requiring a full browser refresh.
- **WebRTC Troubleshooter Accuracy (SL-17799):** Resolved a UI discrepancy in the WebRTC Troubleshooter where the screen displayed incorrect connection statuses. The system now correctly refreshes internal settings upon status changes, ensuring the troubleshooting tool reflects the real-time state of the connection.

Monitoring & Reports

- **Stats Count Discrepancy (SL-17776):** Fixed logic errors where calls were being interpreted as interactions with different update functions, causing dashboard discrepancies.
- **Data Dumping Delay in history Tables (GA-15476):**
  Checked data dumping on the Data Engine side for customer setups. A mismatch was observed in the record counts between **ameyodb** and **data_db** for the **cm_cdr_history** and **campaign_feature_node_history** tables. The discrepancies were due to the following reasons:

Cm_cdr_history

- A null hangup cause code was being set for calling legs.
- The schema of the **cm_cdr_history** table in **data_db** does not allow null values for the hangup cause code.

Change implemented:

- Updated the table schema to allow null values for the hangup cause code.

Campaign_feature_node_history

- A composite key of **(nodeflow_id, start_time)** was used for the **campaign_feature_node_history** table.
- For some entities, these values were identical, causing records to be saved as a single entry in **data_db**.

Change implemented:

- Modified the composite primary key to **(id, start_time)**.
- **Data Dumping Delay (GA-15476):** Resolved record count mismatches between ameyodb and data_db. Schema updates were applied to allow null values for hangup cause codes in cm_cdr_history and to modify the primary key for campaign_feature_node_history.

Limitations and Known Issues

Toolbar & Agent Experience:

- **Inbound Call Popups (EN-142448):** For inbound calls, the customer popup does not appear in the toolbar when multiple customer records match.
- **Preview Dialing UI (GA-14838):** In the "preview alternate number" list, filterable and searchable columns are incorrectly displayed three times.
- **Duplicate Customer Dialing (GA-14853):** The "Create and Dial" feature is not supported in the toolbar when handling duplicate customer scenarios.
- **SAML Support (EN-142553):** SAML authentication is currently not supported with the Omni toolbar.
- **Manual Dialing (GA-14882):** Agents may occasionally encounter an "invalid number" error when manually dialing valid numbers.

- **Preview Screen UI (GA-14851):** Mouse cursors or arrows may appear incorrectly on the customer preview screen.
- **Notifications (GA-14884):** Bell notifications are not displayed after a churn event in pre-production setups.
- **CRM URL Flag (GA-14022):** The AddCustomerInfoToCRMUrl configuration flag currently only functions at the system level.

Campaign & Dialing Strategy:

- **Blacklist Filtering (GA-14534):** Numbers are only blocked by the blacklist feature if they are prefixed with a zero.
- **Dial Time Restrictions (GA-14935):** Changes to dial time restrictions at the campaign level are not updating in the campaign_customer table for existing customers.
- **Retry Settings (GA-14937):** Enabling user-disposition-retry settings after call disposal does not update the campaign_customer table as expected.
- **Masking & Disposition (GA-14933 / GA-14932):**
    - Due to third-party masking setup issues, data in the campaign_customer table does not update after call disposal, potentially causing infinite redialing of the same number.
    - "Create and Dial" functions may fail to initiate calls for successfully created customers when third-party masking is down.
- **System Filters (EN-141977 / EN-140367):** Filters created at the system level are applied to all campaigns, even if they are disabled or not explicitly assigned.

Supervisor & Administration:

- **Call Details UI (GA-14843):** The Call Details screen under the Manage tab in the Supervisor interface appears distorted.
- **Queue Selection (GA-14842 / GA-14841):** Supervisors cannot select a queue from the list during "Transfer to User" or "Confer to User" actions. The queue list incorrectly appears when clicking the campaign option.
- **Force Logout (GA-14956):** Supervisors are currently able to force logout an agent without providing a mandatory reason.
- **Bulk Uploads (GA-15053 / EN-146524):**

    - Uploads fail if CSV column names or sequences are changed after downloading the template, even if mapped correctly.
    - Complete data columns are not shown for mapping in the Contacts tab for Admin and Supervisors.
- **Callback Management (GA-15223 / GA-15224):**
    - Uploading callbacks with is_self_callback set to false fails due to user ID mismatch instead of bypassing the validation.
    - Callback failure logs are missing from the app server, hindering troubleshooting.
- **Agent Monitoring (GA-47):** Agents who have been force-logged out may still appear as active in the right-side panel of Live Monitoring, despite the database correctly recording the logout.
- **Conference Icon (GA-14958):** The conference call icon persists on the UI even after the agent has ended the conference.
- **Excluded Dispositions (EN-132681):** The excluded disposition feature is not functioning correctly in the "Manage Contacts" section for Supervisors.

Omni-Channel & Chat:

- **Media Support (EN-146522):** Messenger integration currently has issues supporting .mp3 and .mp4 file formats.
- **WhatsApp & Messenger Coexistence (GA-15303):** Initiating WhatsApp outbound chats fails when configured in the same campaign as Messenger because the WhatsApp business number option is not visible on the UI.
- **Chat Reload (EN-147340):** Messages are not exchanged between the agent and customer if the page is reloaded during an ongoing chat session.
- **Azure Transcripts (GA-15302):** Transcripts fail to send to Azure storage if multiple attachments are sent simultaneously by the agent.
- **Chat Data Dumping (EN-145660 / GA-15474):**
    - "Abandon At ACD" data is not dumped for Chat Queues when no agents are logged in.
    - Negative UDH (User Data Header) wrap time is erroneously dumped for auto-transferred chats.
- **Inbound WhatsApp Names (GA-15421):** Customer names are not being saved correctly during inbound WhatsApp chat interactions.

- **Integration Tab (GA-53):** Contacts and Cases are not displayed in the CRM Integration tab.

AI & Quality Assurance (CQA):

- **Chat Summary Generation (HR-609 / HR-640):** Outbound chat summaries are not being generated, and some generated summaries do not meaningfully reflect the conversation.
- **Sentiment Analysis (HR-633):** The summary sentiment score often does not match the actual interaction sentiment.
- **Intent Recognition (HR-658):** In some conversations, the Intent heading is not generated correctly based on the interaction context.
- **Scoring Issues (HR-614 / HR-613 / HR-631):**
  - CQA scoring is sometimes missing from the Closed Interaction tab.
  - Supervisors are unable to save manual CQA scoring with comments.
  - Manual scoring is not enabled for all calls regardless of AI scoring status.
- **Quality Profiles (HR-646 / HR-628 / HR-630):**
  - Creating a duplicate Quality Profile causes the screen to go blank.
  - Profile assignment/creation options appear twice on the screen.
  - Quality Profile options incorrectly appear on the AI Audit screen even when AI Analysis is disabled.
- **Unattended Chats (HR-616):** AI scoring is incorrectly analyzing unattended chats.

Reporting & Data:

- **Blank Reports (GA-15503):** The Call Details Report renders blank if run with a phone filter (masked or unmasked) for masking campaigns.
- **Live Monitoring Data (GA-155):** Omni Live Monitoring graphs and data points are displaying incorrect values.
- **Auto Call Data (GA-94):** Data points for "Auto Call On/Off" status are incorrect.
- **Search Issues (EN-145484 / GA-15313):**
  - The search field in Closed Interactions does not work with Customer Name.
  - Searching by name fails if the name contains a space, as the column splits the input.

- **Callback Initiation (GA-15235):** Campaign callbacks are not initiated if the agent is logged in but in a "Break" status.
- **Non-Dialable Status (GA-15098):** The "Non-Dialable" status is not functioning correctly with callbacks.
- **Case IDs (HR-642):** Case IDs are not updating in the Journey map.
- **Past Interactions (HR-604):** Past interaction counts and lists are not showing when the CCDP flag is enabled.
- **UDH Dumping (GA-15452):** There are known issues with UDH data dumping for both voice and omni campaigns.
- **MultiCCManager (EN-145173):** Clicking the contacts tab in MultiCCManager reverts the user to the main login screen.
- **Customer Creation (GA-110):** Customer creation fails for newly created processes in loosely coupled Omni environments.

https://exotel.atlassian.net/browse/GSystem Disposition Incorrectly Displayed as "Connected" When Agent Is Force Logged Out During Ringing StateA-230

Reports Delivered

The following are the names of Reports which QA verifies:

1. CALL History

2. CALL Details

3. ACD Abandon Call Detail Report

4. ACD Call Details

5. ACD Call Interval Summary

6. ACD Call Summary

7. AGENT Session Details

8. AGENT Productivity Summary

9. AGENT Productivity Interval Summary

10. ACD Abandon Call Summary Report

11. QUEUE Performance Report

12. OMNI Call Details Report

13. OMNI Chat Detail Report

14. OMNI INTERACTION CALL History

15. OMNI INTERACTION Detail Report

Sharing below the names of the reports which are mentioned in the Reports tab but not delivered:

1. INTERACTION Activity Daily Report

2. FEEDBACK Report

3. CHAT Channel Report

4. TRANSITION Daily Report

5. ACD Video Chat Details

6. CRM Lead Details Report

7. INTERACTION Service Level Report

8. Supervisor-QA-GM Productivity Summary

9. CRM Details Report

10 ACD Abandon Video Chat Details Report

11. Calls Quality Report

12. VIDEO Chat History

13. KYC Officer Quality Report

14. AGENT PRODUCTIVITY SUMMARY FOR VIDEO CHAT

15.AGENT Chat Report

16. CHAT Agent Productivity Report

17. KYC Request Activity Report

18. KYC Request Summary Report

19. KYC Request Date Wise Summary Report

20. KYC Request Detail Report

21. GROUP AGENT Productivity Summary

22. GROUP AGENT Productivity Interval Summary

23. Conference Report

24. CALL Distribution Interval Summary

25. GROUP AGENT Session Details

26. LEAD Penetration

27. CALL Distribution

Hot Fixes

30th December 2025

1. (EN-393) Omniapp: Fix Route Handling for Logged-in Users, issue is when we open a new tab and enter URL till only with /omniapp or /omniapp/login then login screen showing

Issue:

Logged-in users opening /omniapp or /omniapp/login in a new tab were shown the login screen instead of being redirected to the agent workspace.

Fix:

Improved route handling now automatically redirects logged-in users to /omniapp/agent once the session is ready, while non-logged-in users continue to see the login page. This change works seamlessly across multiple tabs and slow session initialization, with no impact on existing agent routes or navigation.

2. (EN-405) Omniapp: Multiple Navigation and Session Management Issues

Issue:

Users experienced navigation inconsistencies and unexpected logouts due to session handling issues during login/logout cycles, page reloads, and route transitions.

Fix:

Session and navigation handling have been stabilized to ensure a smoother experience. Logout now properly clears stored data, page reloads no longer trigger unintended logouts, and overall routing behavior during session initialization has been improved. The *New Interaction* button is temporarily hidden in the release build to avoid incomplete behavior.

3. (EN-378) Blank Screen when coming from other screen or CTD

Issue:

In some scenarios, agents encountered a blank screen when navigating from other screens or CTD, especially during an incoming call or after force logout. The UI failed to transition to the three-panel view.

Fix:

Navigation handling has been improved to ensure the screen consistently loads the three-panel view during incoming calls and after app switching or force logout. This prevents blank screens and ensures a stable agent experience.

4. (SL-17724) (DCA20251103700442) 6x | webrtc | ring | accept issue || ReACD call to the same agent

Issue:

In some scenarios, agents experienced continuous ringing or missing Accept/Reject options after accepting an inbound call, especially during force logout, re-login, or multiple session scenarios. This led to calls not connecting correctly and inconsistent UI behavior.

Fix:

WebRTC session handling has been improved to ensure proper termination during logout, force logout, and inactivity. Call state synchronization is now consistent, ensuring the Accept/Reject popup appears reliably, ringing stops after call acceptance, and disposition behavior works correctly for ReACD calls. Improved inbound call reliability, stable accept/reject behavior, and consistent disposition handling with no downtime.

5. (SL-17872) (DCA20251218721623)_6x_conferance_timer_data_issue

Issue:

During Conference to User or Conference to Phone, the conference timer on the agent UI either started with an incorrect duration (e.g., 1 -- 1.5 hours) or remained at zero. This occurred due to timezone differences between the server and agent system.

Fix:

The conference timer logic has been updated to start directly on the UI, ensuring accurate timer behavior regardless of server or agent timezone differences.Conference timers now

start correctly and consistently across all timezones, improving call monitoring and agent experience.

6. SL-17834 || DCA20251209716969:QIIC_6x_KI_APP_CRM features not working

Issue:

In some cases, KI App CRM features did not work as expected because interaction details were intermittently missing from the Omni SDK response, leading to incomplete data on the KI side.

Fix:

The interaction data handling has been improved to avoid race conditions. When interaction details are missing, the system now fetches and returns the complete interaction data before responding to the SDK request. Improved reliability and consistency of KI App CRM integration, ensuring correct interaction data is always available to downstream applications.

Omni-UI: bom.ocir.io/bmvcldyxkwlg/omni-ui:6.8.64.20251226-R_253582

2nd January 2026

1. SL-17898 || DCA20251229726179:QIIC_6x_System_auto_avilable || Agent|| Issue

Issue:

When *System Auto Available* was enabled in Admin settings, agents were not automatically set to **Available** after login, particularly for WebRTC users. The configured behavior was not consistently applied.

Fix:

Auto-available handling has been corrected for both **system-level and user-level** configurations. Agents are now automatically marked **Available** after login as per configuration, while reloads, multi-tab usage, and existing agent states (e.g., Break) are preserved correctly.Consistent and predictable agent availability on login with no impact to reload behavior or multi-tab usage.

2. **SL-17897 || DCA20251229726178:QIIC_6x_Mark_As_Available_button_Issue**

Issue:

In some scenarios, after a page reload or reopening the login URL in a new tab, agents were unable to mark themselves as Available. The session appeared restored, but the agent state remained inconsistent, requiring a fresh logout and login.

Fix:

The reload and session restoration logic has been corrected to prevent unintended double reloads and inconsistent UI state. Agent availability now initializes correctly after reload or session restore. Now Agents can reliably change and set their availability without needing to re-login, ensuring smoother session continuity.

3. SL-17900 || DCA20251229726181:QIIC_6x_Agent || Contact information display fields | Agent Column Definitions mapping Features | Issue

Issue:

Agent Contact Information fields did not reflect the **Agent Table Definition (ATD)** configuration set in Admin. Agents could see all customer fields regardless of campaign setup, and read-only restrictions were not consistently applied.

Fix:

ATD handling has been correctly implemented across **View Customer** and **Edit Customer** flows. Agents now see only the fields configured in ATD, in the correct order, with proper read/write access. The **Edit** option is also correctly available for both single and multiple customers during a call.

Omni-UI: bom.ocir.io/bmvcldyxkwlg/omni-ui:6.8.69.20251231-R_255072

5th January 2026

1. SL-17901 || DCA20251230726457:4.9. Chatbot Routing to Live Agent

Issue:

Chats were not routing to the **preferred agent** configured in the **Chat ACD node**. Instead, routing was following the queue's routing model (e.g., *Most Available*), ignoring the preferred user. This limitation existed in the 6.x setup, while the same functionality was available in 4.x.

Root Cause:

Preferred agent selection from the Chat ACD node was not being honored during routing, causing chats to be assigned based solely on queue routing logic and agent capacity.

Fix:

Routing logic has been updated to **prioritize the preferred agent** obtained from the Chat ACD node. When a preferred user is set, the chat is now correctly routed to that agent, overriding the default routing behavior.

2. SL-17906 || New Disposition code || not showing on Agent UI

Issue:

Newly added disposition codes from the Admin UI were not appearing on the Agent UI, even though they were saved correctly in the backend.

Root Cause:

Disposition data was served from an **appserver cache** that was not refreshing when new disposition codes were added, causing stale data to be shown on the Agent UI.

Fix:

The **cache lifecycle has been corrected** so newly added disposition classes and codes are dynamically refreshed and available to agents without requiring an appserver restart.

Behavior After Fix:

1. New disposition classes, codes, and plans reflect immediately on Agent UI.
2. Updates are visible on both **Omni (/omniapp)** and **GWT (/app)** screens.
3. Agents already on a call will see updated plans after reload/relogin (expected behavior).

Appserver Build : bom.ocir.io/bmvcldyxkwlg/appserver:6.8.36.20260103-R_255502

12th January 2026

1. SL-17922 || DCA20260106729215:Emaar 6.x IN1 setup a correction is required in the Chat System Messages

Issue:

Chat system messages shown when an agent joined or exited a chat were inconsistent and used incorrect terminology (“room”).

Fix:

Chat system messages have been standardized to ensure **consistent join and exit notifications**, with terminology updated from **“room” to “chat”** for clarity.

Chat-service: bom.ocir.io/bmvcldyxkwlg/chat-service:6.8.20.20260112-R_257861

Compatibility

- **Browser:** Chrome Version 143.0.7499.110 (Official Build) (arm64).
- **Monitoring:** Zabbix Server 7.2.0 / Zabbix Agent 7.2.0.

Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels or reach out to your Customer Success Manager.

22.3.3. Contact Center - Patch Release Notes 6.8.5

Release Details

Release Date: November 27, 2025

This document outlines the features, enhancements, bug fixes, and security updates for the ECC 6.8.5 release.

Highlights / Release Summary

This patch release for ECC 6.8.5 focuses on enhancing system stability, optimizing resource allocation, and resolving critical legacy bugs. Key highlights include significant optimizations to the Agent Productivity code flow to reduce database load, the introduction of fairness-based routing for Omni Campaign Queues to ensure balanced workload distribution, and real-time permission updates for users. Additionally, this release addresses data consistency issues in call history and queue monitoring.

Build Versions

The components and their corresponding build versions for this release are listed below:

Component	Build URL
amf	bom.ocir.io/bmvcldyxkwlg/amf:6.7.6.20250721-R_54847
appserver	**bom.ocir.io/bmvcldyxkwlg/appserver:6.8.30.20251128-R_244718**
appserver-ui	**bom.ocir.io/bmvcldyxkwlg/appserverui:6.8.10.20251128-R_244678**
applite	ExoApplite-6.4.1.20240801-R_153309.exe
art	**bom.ocir.io/bmvcldyxkwlg/art:6.8.11.20251126-R_243800**
art-dbquery	NA
asrouting	**bom.ocir.io/bmvcldyxkwlg/asrouting:6.8.13.20251126-R_243849**
chat-service	**bom.ocir.io/bmvcldyxkwlg/chat-service:6.8.15.20251126-R_243860**
citus-patch	**bom.ocir.io/bmvcldyxkwlg/citus-patch:6.8.13.20251126-R_243862**
cms	**bom.ocir.io/bmvcldyxkwlg/cms:6.8.17.20251126-R_243847**
cms-dbquery	NA
crm-connector	**bom.ocir.io/bmvcldyxkwlg/crm-connector:6.8.14.20251126-R_243858**
customer-fetcher	**bom.ocir.io/bmvcldyxkwlg/cfs:6.8.15.20251126-R_243848**
data-engine	**bom.ocir.io/bmvcldyxkwlg/dataengine:6.8.27.20251127-R_244077**
eureka	**bom.ocir.io/bmvcldyxkwlg/eureka:6.8.13.20251126-R_243857**
exoxtrm-ingress	NA
fluent-bit	bom.ocir.io/bmvcldyxkwlg/fluent-bit:100.0.14.20241213-R_171818 -not found
fluentd	bom.ocir.io/bmvcldyxkwlg/fluentd-central-logger:100.0.13.20241213-R_171815
gateway	**bom.ocir.io/bmvcldyxkwlg/gateway:6.8.13.20251126-R_243851**
ingress-nginix-controller	NA

Component	Build URL
init	NA
init-exoxtrmutils	NA
interaction-service	**bom.ocir.io/bmvcldyxkwlg/interaction-service:6.8.17.20251126-R_243859**
k8tz	NA
kafka-patch	**bom.ocir.io/bmvcldyxkwlg/kafka-patch:6.8.13.20251126-R_243861**
logrotate(NA)	bom.ocir.io/bmvcldyxkwlg/logrotate:6.0.14.20241126-R_169000
node-logcleanup	bom.ocir.io/bmvcldyxkwlg/logcleanup-k8s-node:6.0.17.20241226-R_174107
postgres	NA
postgres-operator	NA
postgresql	v14
Citus version	v14
scheduler	**bom.ocir.io/bmvcldyxkwlg/scheduler:6.8.13.20251126-R_243852**
vault	NA
zabbix-server	zabbix-server: 7.2.0
zabbix-agent	zabbix-agent2: 7.2.0
patch	**bom.ocir.io/bmvcldyxkwlg/patch:6.8.22.20251126-R_243850**
Kafka	kafka-2.13-3.4.1_1.x86_64.rpm
Redis	redis-stack-server-6.2.6_v2-1.rhel8.rpm
Kafka-connect	bom.ocir.io/bmvcldyxkwlg/kafka-connect:v1
ksqldb(NA)	confluentinc/cp-ksqldb-server:latest
schema-registry	docker.io/bitnami/schema-registry:7.8.0-debian-12-r2
XMF	**bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework:6.8.15.20251126-R_243798**

Component	Build URL
CCDP	**bom.ocir.io/bmvcldyxkwlg/ccdp:6.8.13.20251126-R_243867**
CQA	**bom.ocir.io/bmvcldyxkwlg/cqa:6.8.13.20251126-R_243866**
omni-ui	**bom.ocir.io/bmvcldyxkwlg/omni-ui:6.8.34.20251127-R_244315**

Note - Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle

Features Enhancements

- **Optimize Code Flow - Agent Productivity Stage Events (GA-6)**
  - Optimized consumers for agent-productivity-stage-events and user-session-raw-events to minimize database reads and writes through enhanced caching and batching.
  - **Benefit:** This addresses high lag from approximately 3 DB hits per message, even with increased concurrency and scaling on 8-core Citus workers. P99 lag now stays below 2 minutes (around 5,000 events) for smoother operations.
- **Documentation Link (Internal)**

- **Make poll.interval.timeout and max.pool.size for kafka configurable (GA-28):**
  - Kafka consumer settings `kafka.max.poll.interval.ms` (default: 300,000 ms) and `kafka.max.poll.records` (default: 500) are now fully configurable without requiring build upgrades. These control maximum poll intervals to prevent consumer timeouts and batch sizes for efficient processing.

- **User capacity and RM testing (GA-39):**
  - A new fairness-based routing mechanism for Omni Campaign Queue has been implemented in the Capacity-Based Resource Manager to ensure balanced and efficient distribution of both calls and chats. The routing engine now allocates workloads proportionally to each agent's configured capacity and real-time availability, preventing over-allocation or starvation. The same logic is consistently

applied across voice and chat channels while adhering to performance, licensing, and concurrency limits. These improvements have been validated through controlled simulations to ensure accurate and reliable behavior.

- **Documentation link (Internal)**

Technical Tasks

- N/A

Security Fixes

- N/A

Benchmarking Tasks

- N/A

Debugging and Monitoring Tasks

- **Debugging Docs / SOPs:** N/A
- **Monitoring Tasks:** N/A

Limitations and Known Issues

The following are known limitations and issues in this release:

- **EN-142448:** Inbound calls popup for multiple customers does not appear in the toolbar.
- **GA-14838:** Filterable/searchable columns appear three times in the preview alternate number list.
- **GA-14853:** "Create and Dial" is not supported in the toolbar for the duplicate customer feature.
- **GA-14022:** AddCustomerInfoToCRMUrl flag works only at the system level.
- EN-142553 | EN-140238: SAML is not supported with the omni toolbar.
- **GA-14884:** Bell Notification not displayed after Churn (Preprod setup).
- **GA-14882:** Manual dial sometimes results in an "invalid number" issue in the toolbar.

- **GA-14851:** Mouse arrow shown on preview customer screen during duplicate customer handling.
- **GA-14843:** Call Details screen under the Manage tab on Supervisor interface is distorted.
- **GA-14842:** Transfer/Confer to user: Unable to select queue in queuelist.
- **GA-14841:** Transfer/Confer to user: Queuelist is shown if clicking on the campaign option.
- **GA-14534:** Blacklist feature only blocks numbers if a zero is added before the number.
- **GA-14933:** Data not updating in campaign_customer table after call disposal; same number remains dialable infinitely (Third party masking setup is down).
- **GA-14932:** Create and dial: Customer created successfully but calling fails (Third party masking setup is down).
- **GA-14935:** Dial time restriction setting at campaign level is not updating in campaign_customer table for existing customers.
- **GA-14937:** user-disposition-retry setting enabled after call disposed: table not updating based on setting.
- **GA-14958:** Confer Call Icon persists after Agent ends conference.
- **GA-14956:** Supervisor can force logout Agent without providing a reason.
- **GA-15107:** During force login, the 1st user doesn't get logged out properly.
- **GA-15100:** Create a flag to persist error records in DB for lead upload.
- **GA-15053:** Bulk User Upload: Issues if column names/sequence are changed in downloaded CSV, even if mapped correctly.
- **GA-15098:** Non-Dialable feature not working with callback.
- **EN-132681:** Excluded disposition feature not working on supervisor under manage contacts.
- **EN-141977:** Disabled filter at system level is working.
- **EN-140367:** A filter created at system level and not assigned to a campaign is still applied to all campaigns (legacy).
- **GA-15223:** Callback upload from Supervisor: Fails due to user ID mismatch if is_self_callback is false.
- **Internal Chat:** Disabled (Prashant).

- **GA-15224:** Callback failure logs not available in app server logs.
- **GA-15235:** Campaign Callback is not initiated if agent is logged in and on break.
- **EN-145356:** Complete Contacts data-column not shown everywhere in contacts tab/live interactions.
- **EN-145173:** MultiCCManager: Clicking contact tab reverts to main login screen.
- **EN-145660:** "Abandon At ACD" data not dumping for Chat Queues when no agent is logged in.
- **EN-145484:** Closed Interactions: Search field not working with Customer Name.
- **GA-15313:** Searchable column "name" split into two if name contains a space.
- **EN-146524:** Contacts tab (admin/supervisor): Bulk upload mapping fields missing complete data columns.
- **EN-146522:** Messenger: mp3 and mp4 format support issue.
- **GA-15303:** WhatsApp outbound chat cannot be initiated as business number option is missing; WhatsApp and Messenger not tested in same campaign.
- **GA-15302:** Storage Azure: Transcript failed to send if sending multiple attachments at once.
- **HR-609:** OutBound Chat Summary is not Generated.
- **HR-604:** Past interaction count/list not showing when CCDP flag is enabled.
- **HR-658:** Intent heading not generated correctly based on interaction conversation in some cases.
- **HR-642:** Case Id Not getting Updated in Journey.
- **HR-640:** Meaningful chat summary not generated based on conversation.
- **HR-633:** Summary sentiment does not match interaction sentiment.
- **HR-614:** CQA scoring sometimes not showing in Closed Interaction tab.
- **HR-616:** CQA AI scoring should not be analyzed for unattended chats.
- **HR-631:** Supervisor should be able to perform manual scoring regardless of AI scoring status.
- **HR-646:** Screen goes blank after creating a duplicate Quality Profile.
- **HR-630:** Quality Profile options appear on AI Audit screen even when AI Analysis is disabled.
- **HR-629:** CQA score shows 'No Score Selected' when Tasker is down.

- **HR-628:** Quality Profile Assignment/Creation option showing twice on screen.
- **HR-613:** Supervisor unable to save CQA manual scoring with comments.
- **EN-147340:** Messages not exchanged after reload during ongoing chat.
- **GA-15474:** Negative UDH Wrap Time Dumped in omni_interaction_denormalised_interval_5_min for Auto-Transferred Chats.
- **GA-15421:** Customer name not saving during inbound WhatsApp chat.
- **GA-15503:** Call Details Report returns blank for masking campaign if filtered by phone number.
- **GA-15452:** UDH dumping issue with voice and omni campaigns.
- **GA-47:** Agents force-logged out; logout reason recorded correctly in DB but Live Monitoring shows inconsistent status.
- **GA-110:** Omni Loosely coupled: customer creation failing for newly created process.
- **GA-53:** Contact and Cases Not Displayed in CRM Integration Tab (Omni).
- **GA-155:** Not Getting Correct Graph And Data In Omni Live Monitoring.

Customer Reported and Legacy Bugs Fixes

System Common Bugs

- **User Permissions Update Without Restart (GA-51)(SL-17681):**
  - **Issue:** Previously, changing a user's role (e.g., Executive to Supervisor) required an AppServer restart because the system used old cached data.
  - **Fix:** The system now automatically refreshes and applies permissions instantly when a role is updated, requiring no restart.
- **Duplicate Data Table Name Validation (SL-17719):**
  - **Issue:** Duplicate data table names were not validated during creation, causing failures in operations like Alter/Modify.
  - **Fix:** Proper UI and backend validation has been added to ensure table names are unique at the time of creation.

Voice

- **Dispose and Dial Dumping (GA-4):**

- **Issue:** Dispose and Dial actions were not being saved in the data_db, leading to missing entries in call history.
- **Fix:** The system now correctly records both Dispose and Dial events in the database, ensuring accurate call history.

Monitoring Data and Reports

- **Queue Showing Incorrect Name (SL-17676):**
  - **Issue:** Duplicate userVoiceCampaignRuntime entries caused issues in the Collector, impacting Live Monitoring (Agent List) and Supervisor Screens.
  - **Fix:** The code now handles multiple userVoiceCampaignRuntime instances to prevent this conflict.

Browser Version Support

- Version 142.0.7444.176 (Official Build) (arm64)

Reports Delivered

Verified Reports

The following reports were verified by QA for this release:

- CALL History
- CALL Details
- ACD Abandon Call Detail Report
- ACD Call Details
- ACD Call Interval Summary
- ACD Call Summary
- AGENT Session Details
- AGENT Productivity Summary
- AGENT Productivity Interval Summary
- ACD Abandon Call Summary Report

- QUEUE Performance Report
- OMNI Call Details Report
- OMNI Chat Detail Report
- OMNI INTERACTION CALL History
- OMNI INTERACTION Detail Report

Reports Not Delivered

The following reports are mentioned in the Reports tab but were not delivered in this cycle:

- INTERACTION Activity Daily Report
- FEEDBACK Report
- CHAT Channel Report
- TRANSITION Daily Report
- ACD Video Chat Details
- CRM Lead Details Report
- INTERACTION Service Level Report
- Supervisor-QA-GM Productivity Summary
- CRM Details Report
- ACD Abandon Video Chat Details Report
- Calls Quality Report
- VIDEO Chat History
- KYC Officer Quality Report
- AGENT PRODUCTIVITY SUMMARY FOR VIDEO CHAT
- AGENT Chat Report
- CHAT Agent Productivity Report
- KYC Request Activity Report
- KYC Request Summary Report
- KYC Request Date Wise Summary Report
- KYC Request Detail Report
- GROUP AGENT Productivity Summary

- GROUP AGENT Productivity Interval Summary
- Conference Report
- CALL Distribution Interval Summary
- GROUP AGENT Session Details
- LEAD Penetration
- CALL Distribution

Test Cases Executed

- N/A

Hot Fixes

- N/A

Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels or reach out to your Customer Success Manager.

22.3.4. Contact Center - Patch Release Notes 6.8.4

Release Details

Release Date: November 12, 2025

This document outlines the features, enhancements, bug fixes, and security updates for the ECC 6.8.4 release.

Highlights / Release Summary

- **Horizontal Pod Autoscaling (HPA):** Configured HPA for all stateless components to automatically manage pod scaling based on CPU demand, preventing system slowness.
- **Security & Dependency Upgrades (SBOM):** Upgraded several key dependencies, including Tomcat, Spring, and Zookeeper, to enhance security, performance, and framework compatibility.
- **Docker Scan Fixes:** Addressed vulnerabilities identified in the 6.8.3 - 6.8.4 Docker scan cycle by upgrading affected libraries.
- **Report Accuracy:** Fixed an issue causing incorrect Average Hold Time calculations in the Voice Agent Self Monitoring report.
- **UI Bug Fix:** Resolved an issue where call details were not appearing on the supervisor tab in deployments without the CQA service enabled.

Build Versions

The components and their corresponding build versions for this release are listed below:

Component	Build URL
amf	bom.ocir.io/bmvcldyxkwlg/amf:6.7.6.20250721-R_54847
appserver	**bom.ocir.io/bmvcldyxkwlg/appserver:6.8.24.20251111-R_239315**
appserver-ui	**bom.ocir.io/bmvcldyxkwlg/appserverui:6.8.9.20251112-R_239677**
applite	ExoApplite-6.4.1.20240801-R_153309.exe
art	**bom.ocir.io/bmvcldyxkwlg/art:6.8.10.20251111-R_239256**
art-dbquery	NA
asrouting	**bom.ocir.io/bmvcldyxkwlg/asrouting:6.8.11.20251111-R_239246**
chat-service	**bom.ocir.io/bmvcldyxkwlg/chat-service:6.8.13.20251111-R_239253**
citus-patch	**bom.ocir.io/bmvcldyxkwlg/citus-patch:6.8.11.20251111-R_239255**
cms	**bom.ocir.io/bmvcldyxkwlg/cms:6.8.15.20251112-R_239550**
cms-dbquery	NA
crm-connector	**bom.ocir.io/bmvcldyxkwlg/crm-connector:6.8.12.20251111-R_239251**
customer-fetcher	**bom.ocir.io/bmvcldyxkwlg/cfs:6.8.12.20251111-R_239245**
data-engine	**bom.ocir.io/bmvcldyxkwlg/dataengine:6.8.21.20251111-R_239249**
eureka	**bom.ocir.io/bmvcldyxkwlg/eureka:6.8.11.20251111-R_239250**
exoxtrm-ingress	NA
fluent-bit	bom.ocir.io/bmvcldyxkwlg/fluent-bit:100.0.14.20241213-R_171818 -not found
fluentd	bom.ocir.io/bmvcldyxkwlg/fluentd-central-logger:100.0.13.20241213-R_171815
gateway	**bom.ocir.io/bmvcldyxkwlg/gateway:6.8.11.20251111-R_239247**
ingress-nginix-controller	NA
init	NA
init-exoxtrmutils	NA

Component	Build URL
interaction-service	**bom.ocir.io/bmvcldyxkwlg/interaction-service:6.8.15.20251111-R_239252**
k8tz	NA
kafka-patch	**bom.ocir.io/bmvcldyxkwlg/kafka-patch:6.8.11.20251111-R_239254**
logrotate(NA)	bom.ocir.io/bmvcldyxkwlg/logrotate:6.0.14.20241126-R_169000
node-logcleanup	bom.ocir.io/bmvcldyxkwlg/logcleanup-k8s-node:6.0.17.20241226-R_174107
postgres	NA
postgres-operator	NA
postgresql	v14
Citus version	v14
scheduler	**bom.ocir.io/bmvcldyxkwlg/scheduler:6.8.11.20251111-R_239248**
vault	NA
zabbix-server	zabbix-server: 7.2.0
zabbix-agent	zabbix-agent2: 7.2.0
patch	**bom.ocir.io/bmvcldyxkwlg/patch:6.8.20.20251112-R_239492**
Kafka	kafka-2.13-3.4.1_1.x86_64.rpm
Redis	redis-stack-server-6.2.6_v2-1.rhel8.rpm
Kafka-connect	bom.ocir.io/bmvcldyxkwlg/kafka-connect:v1
ksqldb(NA)	confluentinc/cp-ksqldb-server:latest
schema-registry	docker.io/bitnami/schema-registry:7.8.0-debian-12-r2
XMF	**bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework:6.8.12.20251111-R_239260**
CCDP	**bom.ocir.io/bmvcldyxkwlg/ccdp:6.8.11.20251111-R_239263**
CQA	**bom.ocir.io/bmvcldyxkwlg/cqa:6.8.11.20251111-R_239259**
omni-ui	**bom.ocir.io/bmvcldyxkwlg/omni-ui:6.8.25.20251112-R_239726**

> **Note - Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle.**

Feature Enhancements

- **Horizontal Pod Autoscaling in our 6x all stateless components based (GA-15520):**

In multiple instances, the replicaset count for 6x components has been manually increased in response to observed CPU spikes. This manual intervention has occasionally led to performance degradation at the customer end.

To streamline scaling and prevent such issues, Horizontal Pod Autoscaling (HPA) will be implemented in the 6x deployment for all stateless components. The HPA will monitor CPU utilization and automatically adjust the number of pods based on demand.

Additionally, pod scheduling distribution across worker nodes will be reviewed to evaluate whether adjustments are required for more balanced allocation as per the deployment use case.

Document Link (Internal):

- **Dependency Upgrades (SBOM) (EN-147887):**

This release includes key dependency upgrades to improve security, performance, and compatibility. Updates cover tomcat-embed-websocket for WebSocket stability, commons-lang3 and opencsv for utility and parsing, lettuce-core for enhanced Redis integration, and json for stricter JSON handling. Spring-boot-actuator-autoconfigure, spring-webmvc, and zookeeper were also upgraded for improved security, stability, and framework alignment.

Dependency	Old Version	New Version
tomcat-embed-websocket	9.0.86	9.0.110
commons-lang3	3.18.0	3.19.0
opencsv	5.7.1	5.12.0
lettuce-core	6.2.0.RELEASE	6.3.2.RELEASE
json	20231013	20250517
spring-boot-actuator-autoconfigure	2.7.2	2.7.11
zookeeper	3.7.2	3.9.4
spring-webmvc	5.3.22	5.3.26

- **Contact Center Admin/ PS should be able to configure customer Journey (voicebot and Synthesiser) from the same Interface (EN-148124):**

As an Admin or PS user, you will be able to configure the customer journey—including both the Voicebot Designer and Synthesizer—from a single, integrated interface. This unified view ensures the entire customer journey is centrally managed without losing context.

- The Admin can navigate to the "Customer Journey" tab where both the Synthesizer and Voicebot Designer are displayed side-by-side.
- There is no need for separate logins to the Voicebot system; access is seamless within the same interface.
- This feature is supported on both 4X and 6X versions of the platform.

To Enable Voice Bot Tab Below configuration should be present.

```
INSERT INTO server_preference_store (context_id, context_type, key, value)
VALUES ( 99, 'contactCenter', 'voiceBotUIUrl', 'https://voicebot-
staging.mum1.exotel.com' );
```

Documents link (Internal):
https://exotel.atlassian.net/wiki/spaces/ECC/pages/1455259671/Voice+Bot+QA+Configuration

Security and Performance Updates

- **Docker Scan Vulnerabilities (EN-147910):**

Application libraries were upgraded to enhance security, boost performance, and align with the latest framework standards. The major version updates improve system stability, ensure compliance with best practices, and optimize functionality for smoother, more reliable operations.

Benchmarking

NA

Debugging Docs / SOPs

NA

Monitoring Tasks

NA

Limitations and Known Issues

The following are known limitations or issues in this release:

- **[EN-142448]** For inbound calls, the customer selection popup does not appear in the toolbar when multiple customers exist.
- **[GA-14838]** Filterable and searchable columns appear three times in the alternate preview view.
- **[GA-14853]** "Create and Dial" is not supported in the toolbar for the duplicate customer feature.
- **[GA-14022]** The "AddCustomerInfoToCRMUrl" flag functions only at the system level.
- **[EN-142553 | EN-140238]** SAML authentication is not supported in the Omni toolbar.
- **[GA-14884]** Bell notifications do not appear after customer churn in the pre-production setup.

- **[GA-14882]** During manual dialing, the system occasionally reports an “invalid number” error.
- **[GA-14851]** In the duplicate customer preview screen, the mouse pointer appears unexpectedly.
- **[GA-14843]** The Call Details screen under the Supervisor > Manage tab appears distorted.
- **[GA-14842]** “Transfer to user” and “Confer to user” options do not display the queue list.
- **[GA-14841]** Queue list is shown incorrectly when selecting the campaign option in the same module.
- **[GA-14534]** The Blacklist feature only blocks numbers prefixed with zero.
- **[GA-14933]** Campaign_customer table is not updating after call disposition, causing the same number to remain dialable multiple times (third-party masking setup down).
- **[GA-14932]** The "Create and Dial" function creates customers successfully, but calls fail due to third-party masking issues.
- **[GA-14935]** Dial time restriction setting at the campaign level does not update in the campaign_customer table for existing customers.
- **[GA-14937]** When “user-disposition-retry” is enabled, campaign_customer table does not update as per configuration after call disposition.
- **[GA-14958]** The conference call icon continues to display after the agent ends the conference.
- **[GA-14956]** Supervisor can force logout agents without providing a reason.
- **[GA-15107]** During force login, the first user session does not log out properly (fix pending).
- **[GA-15100]** A flag is required to persist error records in the database during lead uploads.
- **[GA-15053]** Bulk user upload fails if CSV column names or sequence differ, even after correct mapping.
- **[GA-15098]** “Non-dialable” flag does not function properly with callback.
- **[GA-14935]** Dial time restriction at the campaign level is not updating in the campaign_customer table for existing customers.
- **[EN-132681]** Excluded disposition feature does not work under Supervisor → Manage Contacts.

- **[EN-141977]** System-level disabled filters remain active.
- **[EN-140367]** System-level filters not assigned to any campaign are still applied across all campaigns.
- **[GA-15223]** During callback upload from Supervisor, system fails when is_self_callback is false instead of bypassing user ID mismatch.
- **[GA-15224]** Callback failure logs are missing in the application server logs, preventing failure analysis.
- **[GA-15235]** Callback does not initiate if the agent is logged in but on break (campaign callback).
- **[EN-145356]** In the Agent screen, complete contact data columns are missing under Contacts → Live Interactions.
- **[EN-145173]** In MultiCCManager, clicking on the Contacts tab causes redirection to the login screen, preventing access.
- **[EN-145660]** “Abandon At ACD” data is not captured for chat queues when no agents are logged in.
- **[EN-145484]** Closed Interactions search does not return results when using Customer Name.
- **[GA-15313]** Customer search splits the “Name” field if the name includes spaces.
- **[EN-146524]** In Admin and Supervisor > Contacts, bulk upload mapping does not show all data columns.
- **[EN-146522]** Messenger module does not support MP3 and MP4 file formats.
- **[GA-15303]** WhatsApp and Messenger cannot be tested in the same campaign; outbound WhatsApp initiation fails as the business number option is missing.
- **[GA-15302]** Sending multiple attachments simultaneously causes transcript failure on Azure storage.
- **[HR-609]** Outbound chat summary is not generated.
- **[HR-604]** Past interaction count and list are not visible when the CCDP flag is enabled.
- **[HR-658]** Intent headings are not always generated correctly in some conversations.
- **[HR-642]** Case ID is not updated in the customer journey.
- **[HR-640]** Chat summary generation lacks meaningful insights from agent-customer conversations.

- **[HR-633]** Summary sentiment does not align with the actual conversation sentiment.
- **[HR-614]** CQA score occasionally missing in the Closed Interaction → Quality Profile Score column.
- **[HR-616]** Unattended chats are incorrectly included in AI-based CQA analysis.
- **[HR-631]** Supervisors are unable to perform manual scoring for calls if AI scoring is not executed.
- **[HR-646]** Screen goes blank upon creating a duplicate Quality Profile and refreshes only after switching tabs.
- **[HR-630]** When AI Analysis is disabled, Quality Profile options still appear on the AI Audit screen.
- **[HR-629]** When Tasker service is down, “No Score Selected” is displayed in the CQA score.
- **[HR-628]** Quality Profile Assignment and Creation options appear twice on screen.
- **[HR-613]** Supervisors are unable to save manual CQA scores along with comments.
- **[EN-147340]** Messages are not exchanged between agent and customer after page reload during an ongoing chat.
- **[GA-15474]** Negative UDH wrap time values are recorded in omni_interaction_denormalised_interval_5_min for auto-transferred chats.
- **[GA-15421]** Customer name is not being saved for inbound WhatsApp chats.
- **[GA-15503]** Call Details Report under masking campaigns returns blank output when filtered by phone number (masked/unmasked).
- **[GA-15452]** UDH mismatch observed between voice and omni campaigns.
- **[GA-15624]** Supervisor → Report → Queue section returns a 500 Internal Server Error on pre-prod and KSA setups.

Customer Reported and Legacy Bug Fixes

System Common Bugs

- **Incorrect average hold time displayed in Voice Agent Self-Monitoring (Superset) [GA-15607]:**

Previously, the average hold time was calculated by dividing the total hold time by the number of calls that included hold durations, resulting in skewed values. The logic now divides the total hold time by all calls within the interval, providing a more accurate and consistent calculation.

Voice

- NA

Monitoring Data and Reports

- **Configuration support for enabling or disabling history tables on the data-engine and appserver sides [GA-15476]:**

History tables such as call history, user disposition history, CM CDR history, campaign feature nodeflow history, and campaign feature node history were previously used for debugging. Call history and user disposition history tables are now permanently disabled on the appserver side.
Other tables (CM CDR, campaign feature nodeflow, and campaign feature node history) can be toggled on or off at the appserver and data-engine levels using configuration flags. By default, these remain enabled and are dumped into both `ameyodb` and `data_db`.

Documentation link (Internal):

Omni Campaign - Voice and Chat Interactions

NA

UI/UX Bugs

- **KSA setup – Supervisor and Group Manager: Call details not displayed in the Call Details tab [GA-15621]:**

The issue occurred in setups where the CQA service was not deployed. This has been resolved, and an additional configuration flag is required.
The `isCQAEnabled` flag must be set to “disabled” in the `server-preference-store`, as this configuration already exists at the contactCenter level.

Browser Version

Version 141.0.7390.123 (Official Build) (arm64)

Reports Delivered

Verified Reports

The following reports were verified by QA for this release:

- CALL History
- CALL Details
- ACD Abandon Call Detail Report
- ACD Call Details
- ACD Call Interval Summary
- ACD Call Summary
- AGENT Session Details
- AGENT Productivity Summary
- AGENT Productivity Interval Summary
- ACD Abandon Call Summary Report
- QUEUE Performance Report
- OMNI Call Details Report
- OMNI Chat Detail Report
- OMNI INTERACTION CALL History
- OMNI INTERACTION Detail Report

Reports Not Delivered

The following reports, though listed in the Reports tab, were not delivered in this cycle:

- INTERACTION Activity Daily Report

- FEEDBACK Report
- CHAT Channel Report
- TRANSITION Daily Report
- ACD Video Chat Details
- CRM Lead Details Report
- INTERACTION Service Level Report
- Supervisor-QA-GM Productivity Summary
- CRM Details Report
- ACD Abandon Video Chat Details Report
- Calls Quality Report
- VIDEO Chat History
- KYC Officer Quality Report
- AGENT PRODUCTIVITY SUMMARY FOR VIDEO CHAT
- AGENT Chat Report
- CHAT Agent Productivity Report
- KYC Request Activity Report
- KYC Request Summary Report
- KYC Request Date Wise Summary Report
- KYC Request Detail Report
- GROUP AGENT Productivity Summary
- GROUP AGENT Productivity Interval Summary
- Conference Report
- CALL Distribution Interval Summary
- GROUP AGENT Session Details
- LEAD Penetration
- CALL Distribution

Test Cases Executed

N/A

Hot Fixes

N/A

Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels or reach out to your Customer Success Manager.

22.3.5.

Contact Center - Patch Release Notes 6.8.3

Release Details

Release Date: October 30, 2025

This document outlines the features, enhancements, bug fixes, and security updates for the ECC 6.8.3 release.

Highlights / Release Summary

This release bridges the gap between Voice and Omni capabilities by **promoting Inbound Voice Campaigns to use the modern Omni UI**. This allows existing 6X voice customers to adopt the new, user-friendly agent experience without a complex migration

Key new features include a major **integration with Konnect Insights** for unified ticketing and communication, an **inactivity-based auto-logout** for toolbar integrations to improve license management, and **sanitization of sensitive data** in logs to enhance security

This version also delivers significant technical improvements, including a smarter, more resilient KSQL registration process and a unified theme color system for a consistent brand experience across all modules.

Build Versions

The components and their corresponding build versions for this release are listed below:

Component	Build URL
amf	bom.ocir.io/bmvcldyxkwlg/amf:6.7.6.20250721-R_54847
appserver	**bom.ocir.io/bmvcldyxkwlg/appserver:6.8.21.20251031-R_236358**
appserver-ui	**bom.ocir.io/bmvcldyxkwlg/appserverui:6.8.8.20251030-R_236015**
applite	ExoApplite-6.4.1.20240801-R_153309.exe
art	**bom.ocir.io/bmvcldyxkwlg/art:6.8.8.20251029-R_235728**
art-dbquery	NA
asrouting	**bom.ocir.io/bmvcldyxkwlg/asrouting:6.8.9.20251029-R_235701**
chat-service	**bom.ocir.io/bmvcldyxkwlg/chat-service:6.8.10.20251029-R_235709**
citus-patch	**bom.ocir.io/bmvcldyxkwlg/citus-patch:6.8.9.20251029-R_235711**
cms	**bom.ocir.io/bmvcldyxkwlg/cms:6.8.13.20251030-R_235759**
cms-dbquery	NA
crm-connector	**bom.ocir.io/bmvcldyxkwlg/crm-connector:6.8.10.20251029-R_235707**
customer-fetcher	**bom.ocir.io/bmvcldyxkwlg/cfs:6.8.10.20251029-R_235700**
data-engine	**bom.ocir.io/bmvcldyxkwlg/dataengine:6.8.18.20251030-R_236060**
eureka	**bom.ocir.io/bmvcldyxkwlg/eureka:6.8.9.20251029-R_235706**
exoxtrm-ingress	NA
fluent-bit	bom.ocir.io/bmvcldyxkwlg/fluent-bit:100.0.14.20241213-R_171818 -not found
fluentd	bom.ocir.io/bmvcldyxkwlg/fluentd-central-logger:100.0.13.20241213-R_171815
gateway	**bom.ocir.io/bmvcldyxkwlg/gateway:6.8.9.20251029-R_235703**
ingress-nginix-controller	NA

Component	Build URL
init	NA
init-exoxtrmutils	NA
interaction-service	**bom.ocir.io/bmvcldyxkwlg/interaction-service:6.8.13.20251029-R_235708**
k8tz	NA
kafka-patch	**bom.ocir.io/bmvcldyxkwlg/kafka-patch:6.8.9.20251029-R_235710**
logrotate(NA)	bom.ocir.io/bmvcldyxkwlg/logrotate:6.0.14.20241126-R_169000
node-logcleanup	bom.ocir.io/bmvcldyxkwlg/logcleanup-k8s-node:6.0.17.20241226-R_174107
postgres	NA
postgres-operator	NA
postgresql	v14
Citus version	v14
scheduler	**bom.ocir.io/bmvcldyxkwlg/scheduler:6.8.9.20251029-R_235704**
vault	NA
zabbix-server	zabbix-server: 7.2.0
zabbix-agent	zabbix-agent2: 7.2.0
patch	**bom.ocir.io/bmvcldyxkwlg/patch:6.8.18.20251030-R_236112**
Kafka	kafka-2.13-3.4.1_1.x86_64.rpm
Redis	redis-stack-server-6.2.6_v2-1.rhel8.rpm
Kafka-connect	bom.ocir.io/bmvcldyxkwlg/kafka-connect:v1
ksqldb(NA)	confluentinc/cp-ksqldb-server:latest
schema-registry	docker.io/bitnami/schema-registry:7.8.0-debian-12-r2
XMF	**bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework:6.8.10.20251029-R_235713**

Component	Build URL
CCDP	bom.ocir.io/bmvcldyxkwlg/ccdp:6.8.9.20251029-R_235720
CQA	bom.ocir.io/bmvcldyxkwlg/cqa:6.8.9.20251029-R_235712
omni-ui	bom.ocir.io/bmvcldyxkwlg/omni-ui:6.8.19.20251030-R_235932

Note - Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle

Features Enhacement

- **Promote Voice Inbound Campaign to Omni Inbound Campaign (EN-147673):**
  - **What it is:** A major strategic update that enhances the 6X Voice Process to include omnichannel capabilities. Existing Inbound Voice campaigns can now be "promoted" (via a flag) to use the new Omni UI for the agent persona.
  - **Benefit:** This allows existing 6X voice customers to adopt the modern, user-friendly Omni agent experience **without a disruptive migration.** Backend handling for interactions and reporting remains compatible.
  - **Scope:** This initial release covers **inbound voice campaigns** and the **agent persona** only. Dialer, toolbar, and supervisor modules are out of scope for this specific update.
  - **Documentation link (Internal):**

- **Update & Fetch Interaction,ccdp,cqa,konnectinsights,harmony) (EN-147386):**
  - **What it is:** Enables integration between ECC and Konnect Insights (KI), allowing KI to act as the system of record for tickets while ECC manages the omnichannel communications.
  - **Benefit:** Agents can access KI (embedded via URL) directly within the ECC interface, eliminating the need to switch tools. The integration supports ticket creation, synchronization, and data exchange (e.g., ECC passes InteractionId to KI; KI returns Ticket IDs and can fetch CCDP summaries).

- **Internal Note:** As of now, the app has not been provided by the PS team for integration testing, so the Ticket Creation API is being used instead. 'https://interaction-service.engg-preprod.cc.exotel.com:443/v1/cc-list/99/process-list/169/interactions/83617b30-0554-4024-b002-1ed4e22510/metadata/ticket_id'
- **Documentation Link (Internal):**

- **Inactivity understanding in 6X toolbar integrations including Omni (EN-146986):**
  - **What it is:** Introduces an inactivity timer for the ECC toolbar when integrated with a parent CRM.
  - **Benefit:** Improves license efficiency and WFM adherence reports. The parent CRM can now configure the toolbar to automatically log out agents after a defined period of idle time.
  - **Documentation Link (Internal)**

- **Sanitization of Logs (GA-15444):**
  - **What it is:** An enhancement to log management in the AppServer and Data Engine.
  - **Benefit:** Improves security and data privacy by sanitizing sensitive information (confidential data or PII) from the system logs. This ensures safer log handling during troubleshooting.
  - **Documentation Link for Data-engine logs (Internal)**

- **KSQL Patch Upgrade: Dependent KSQL Issue (GA-15394):**
  - **What it is:** A major improvement to the KSQL registration and re-registration process.
  - **Benefit:** The system is now smarter, faster, and more reliable. It automatically determines the correct registration order for dependent KSQL components 350and **only re-registers KSQLs that have actual version changes**351. This reduces unnecessary operations, speeds up deployments, and provides enhanced error handling.

    - **Action Required:** After deployment, please restart the CMS service pods **one after another** (sequentially or via Rolling Update) to ensure smooth application recovery
    - **Note:**Please restart the CMS service pods one after another (sequentially or Rolling Update manner) to ensure smooth application recovery and avoid service disruption.

- **Unified Theme Color Across ECC (EN-147776):**
    - **What it is:** A standardized theme color system has been introduced across all product SKUs.
    - **Benefit:** Replaces the previously distinct color schemes for each SKU. This creates a cohesive, recognizable brand identity and a unified user interface, improving usability and accessibility

Technical Tasks

- NA

Security Fixes

- NA

Benchmarking Tasks

- NA

Debugging and Monitoring Tasks

- **Debugging Docs / SOPs:** NA
- **Monitoring Tasks:** NA

Limitations and Known Issues

The following are known limitations or issues in this release361:

- **EN-142448:** For inbound calls, the popup for multiple customers does not appear in the toolbar.
- **GA-14838:** Filterable and searchable columns are shown three times in the preview alternate number list.
- **GA-14853:** "Create and Dial" is not supported in the toolbar for the duplicate customer feature.
- **GA-14022:** The AddCustomerInfoToCRMUrl flag is working only at the system level.
- **EN-142553 | EN-140238:** SAML is not supported with the omni toolbar.
- **GA-14884:** Bell Notification not displayed after Churn (Preprod setup).
- **GA-14882:** Toolbar sometimes faces an "invalid number" issue during manual dial.
- **GA-14851:** Duplicate customer handling: Mouse arrow is shown on the preview customer screen.
- **GA-14843:** The Call Details screen under the Manage tab (Supervisor) is distorted.
- **GA-14842:** Transfer/Confer to user: Not able to select a queue in the queue list.
- **GA-14841:** Transfer/Confer to user: Queue list is shown when clicking on the campaign option.
- **GA-14534:** Blacklist feature: A number is only blocked if a zero is added before the number.
- **GA-14933:** Data is not updating in campaign_customer table after call disposition (Third-party masking setup is down).
- **GA-14932:** "Create and dial": Customer is created, but calling is not working (Third-party masking setup is down).
- **GA-14935:** Dial time Restriction at campaign level: Dial time is not updating in campaign_customer table for existing customers.
- **GA-14937:** user-disposition-retry setting: campaign_customer table is not updated based on the setting after call disposition.
- **GA-14958:** Conference Call Icon persists after the agent ends the conference.
- **GA-14956:** Supervisor can force logout an agent without providing a reason.
- **GA-15107:** During force login, the 1st user doesn't get logged out properly (Fix Not Received).

- **GA-15100:** Need a flag to persist error records in DB for lead upload.
- **GA-15053:** Bulk User Upload: Issues occur if column names or sequence are changed in the downloaded CSV, even after correct mapping.
- **GA-15098:** Non-Dialable feature is not working with callback.
- **EN-132681:** Excluded disposition feature is not working on the supervisor "manage contacts" page.
- **EN-141977:** A disabled filter at the system level is still working.
- **EN-140367:** A filter created at the system level but not assigned to a campaign is still applied to all legacy campaigns.
- **GA-15223:** Callback upload from Supervisor: If is_self_callback is false, the userId being passed should be bypassed instead of failing.
- **GA-15224:** Callback failure logs are not available in app server logs.
- **GA-15235:** Callback is not initiated if an agent is logged in but on break (Campaign callback).
- **EN-145356:** Agent screen: Complete "Contacts" data columns are not shown everywhere.
- **EN-145173:** MultiCCManager: Clicking the contact tab reverts to the main login screen.
- **EN-145660:** "Abandon At ACD" data is not dumping for Chat Queues when no agent is logged in.
- **EN-145484:** Closed Interactions: Search field not working with Customer Name.
- **GA-15313:** Customer searching issue: Searchable "name" column splits into two if the name has a space.
- **EN-146524:** Contacts tab (Admin/Supervisor) bulk upload: Complete data column fields are not shown for mapping.
- **EN-146522:** Messenger: mp3 and mp4 format support issue.
- **GA-15303:** WhatsApp and Messenger not tested in the same campaign. Unable to initiate WhatsApp outbound chat.
- **GA-15302:** Storage Azure: Transcript fails to send to Azure if multiple attachments are sent at a time.
- **HR-609:** Outbound Chat Summary is not generated.
- **HR-604:** Past interaction count and list are not showing when the CCDP flag is enabled.

- **HR-658:** Intent heading is not generated correctly in some conversations.
- **HR-642:** Case ID not getting updated in Journey.
- **HR-640:** A meaningful chat summary was not generated.
- **HR-633:** Summary sentiment does not match the interaction sentiment.
- **HR-614:** CQA scoring is sometimes not showing in the Closed Interaction tab.
- **HR-616:** CQA AI scoring should not be analyzed for unattended chats.
- **HR-631:** Supervisor should be able to perform manual scoring for all calls, regardless of AI scoring.
- **HR-646:** The screen gets blank after creating a duplicate Quality Profile.
- **HR-630:** When AI Analysis is disabled, those Quality Profile options should not appear on the AI Audit screen.
- **HR-629:** When Tasker is down, CQA score shows 'No Score Selected'.
- **HR-628:** Quality Profile Assignment/Creation option is showing twice on screen.
- **HR-613:** The supervisor is unable to save CQA manual scoring with comments.
- **EN-147340:** Messages not exchanged between agent and customer after reload during an ongoing chat.
- **GA-15474:** Negative UDH Wrap Time dumped for Auto-Transferred Chats.
- **GA-15421:** WhatsApp inbound chat: Customer name is not being saved.
- **GA-15503:** Call Details Report: Getting a blank report for masking campaigns if filtering by phone number (masked or unmasked)
- **GA-15452:** UDH dumping issue with voice and omni campaigns.

Customer Reported and Legacy Bugs Fixes

System Common Bugs

- **GA-15449 (CMS API Optimization):**
    - **Problem:** Several CMS APIs (like /agentDashboard, /supersetConfig) were being called redundantly during user actions like login and tab switching, increasing backend load and slowing UI response41941941941

- **Fix:** These APIs are now cached efficiently to ensure they are called only when necessary. This results in faster response times and smoother navigation.

- **HR-782 (CQA Rule Assignment UI):**
  - **Problem:** In the CQA Campaign Level Quality Assignment tab, the Filter Condition section was showing many attributes, but their operator values were not displaying.
  - **Fix:** This has been corrected. The UI now correctly displays only the three supported attributes (Call Type, User Disposition, Talk Time) and their corresponding operator values in the dropdown.

Voice

- **JWT Token Synchronization (GA-15469):**
  - **Problem:** When a JWT token was refreshed in one toolbar tab, the new token was not synced to other open tabs or the WebRTC tab, causing 401 Unauthorized errors.
  - **Fix:** The refreshToken API now syncs the updated token to other tabs via localStorage and to the WebRTC tab via a push API. If an inactive tab makes an API call and gets a 401 error, it will automatically reload to fetch the new token.
- **API URL Character Limit (SL-17589):**
  - **Problem:** An API call (/primary-campaign-for-users) was failing because it passed a very large list of user IDs in the URL as query parameters, exceeding the 2,048-character limit.
  - **Fix:** The API endpoint has been updated to no longer require the list of user IDs as query parameters, resolving the failure.
  -
- **Transfer to Campaign API Failure (SL-17701):**
  - **Problem:** The 'Transfer to Campaign' API was failing with an internal server error because it was receiving a vcall type callId but was expecting a cmlp type callId.
  - **Fix:** The logic has been updated to correctly recognize and process vcall type callIds, allowing the API to work as expected.

Monitoring Data and Reports

- **Talk Time Inconsistency in Reports (SL-17616):**

- **Problem:** In call transfer scenarios, the customer talk time was incorrectly being recorded as IVR time. Additionally, the first user's data was not recorded in the user_disposition_history table.
- **Fix:** The issue is resolved for IVR playback during inbound calls. The talk_time values in both call_history and user_disposition_history tables are now correctly updated and consistent in transfer-to-user scenarios.

- **Lead Name in Auto-Dial (SL-17533):**
  - **Problem:** In the outbound auto-dial flow, the Lead Name field was incorrectly displaying the Lead ID.
  - **Fix:** The mapping for LEAD_NAME in the Kafka event has been corrected to send the actual lead name. This fix will reflect in call history and reports.

- **Shortest Call Duration in Dashboard (GA-15601):**
  - **Problem:** On the Superset Dashboard, if no calls were made within a 5-minute interval, the "Shortest Call Duration" was incorrectly calculated as 0.
  - **Fix:** The KSQL logic was fixed to ensure that zero values are excluded from the array_min calculation, resulting in the correct shortest duration being reported.

Omni Campaign - Voice and Chat Interactions

- **Missing Data in Push Event (GA-15549):**
  - **Problem:** The ChatCRMCreateNotifyPush event was missing the interactionId and thirdPartyData required for CRM integration popups.
  - **Fix:** As a workaround, the CustomerChatMemberUpdatedPush event is now used to handle the OpenCTI popup functionality. Additionally, the interactionId will be added to the CRM app URL.

Browser Version Support

- Version 141.0.7390.123 (Official Build) (arm64)

Reports Delivered

Verified Reports

The following reports were verified by QA for this release:

1. CALL History
2. CALL Details
3. ACD Abandon Call Detail Report
4. ACD Call Details
5. ACD Call Interval Summary
6. ACD Call Summary
7. AGENT Session Details
8. AGENT Productivity Summary
9. AGENT Productivity Interval Summary
10. ACD Abandon Call Summary Report
11. QUEUE Performance Report
12. OMNI Call Details Report
13. OMNI Chat Detail Report
14. OMNI INTERACTION CALL History
15. OMNI INTERACTION Detail Report

Reports Not Delivered

The following reports are listed in the Reports tab but were not delivered in this cycle:

- INTERACTION Activity Daily Report
- FEEDBACK Report
- CHAT Channel Report
- TRANSITION Daily Report

- ACD Video Chat Details
- CRM Lead Details Report
- INTERACTION Service Level Report
- Supervisor-QA-GM Productivity Summary
- CRM Details Report
- ACD Abandon Video Chat Details Report
- Calls Quality Report
- VIDEO Chat History
- AGENT PRODUCTIVITY SUMMARY FOR VIDEO CHAT
- AGENT Chat Report
- CHAT Agent Productivity Report
- GROUP AGENT Productivity Summary
- GROUP AGENT Productivity Interval Summary
- Conference Report
- CALL Distribution Interval Summary
- GROUP AGENT Session Details
- LEAD Penetration
- CALL Distribution

Test Cases Executed

- NA

Hot Fixes

- **WhatsApp Chat and Exotel Login Issues (SL-17700):**
    - **Problem:** Agents with emojis (or other non-BMP Unicode characters) (e.g.,) in their display names were unable to join chat rooms.

- **RCA:** The Openfire XMPP server rejects JIDs (Jabber IDs) that contain such characters, and the agent display name was being used to form the JID.
- **Fix:** A sanitization process has been implemented to automatically strip or replace invalid Unicode characters (like emojis) from agent display names during JID formation, preventing the chat join failure491.
- **Chat-Service Build Tag: bom.ocir.io/bmvcldyxkwlg/chat-service:6.8.11.20251104-R_237118**

Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels or reach out to your Customer Success Manager.

22.3.6. Contact Center - Patch Release Notes 6.8.2

Release Details

Release Date: October 19, 2025

This document outlines the features, enhancements, bug fixes, and security updates for the ECC 6.8.2 release.

Highlights / Release Summary

This is a focused patch release that introduces new agent-facing features, including the ability to **group related interactions** (e.g., start a call from a chat) and **CQA (Quality Profile) support for voice campaigns.**

This version also delivers critical **security fixes** to address HTML injection vulnerabilities found in report uploads and special character handling. Additionally, it includes important bug fixes related to call recording formats (adding stereo support) and report filters for BYOK customers.

Build Versions

The components and their corresponding build versions for this release are listed below:

Component	Build URL
amf	bom.ocir.io/bmvcldyxkwlg/amf:6.7.6.20250721-R_54847
appserver	**bom.ocir.io/bmvcldyxkwlg/appserver: 6.8.18.20251016-R_232734**
appserver-ui	**bom.ocir.io/bmvcldyxkwlg/appserverui: 6.8.7.20251017-R_232962**
applite	ExoApplite-6.4.1.20240801-R_153309.exe
art	**bom.ocir.io/bmvcldyxkwlg/art:6.8.7.20251015-R_232161**
art-dbquery	NA
asrouting	**bom.ocir.io/bmvcldyxkwlg/asrouting:6.8.6.20251014-R_231603**
chat-service	**bom.ocir.io/bmvcldyxkwlg/chat-service: 6.8.7.20251014-R_231612**
citus-patch	**bom.ocir.io/bmvcldyxkwlg/citus-patch:6.8.6.20251014-R_231615**
cms	**bom.ocir.io/bmvcldyxkwlg/cms:6.8.11.20251017-R_233080**
cms-dbquery	NA
crm-connector	**bom.ocir.io/bmvcldyxkwlg/crm-connector:6.8.7.20251014-R_231610**
customer-fetcher	**bom.ocir.io/bmvcldyxkwlg/cfs:6.8.7.20251014-R_231602**
data-engine	**bom.ocir.io/bmvcldyxkwlg/dataengine: 6.8.15.20251018-R_233202**
eureka	**bom.ocir.io/bmvcldyxkwlg/eureka: 6.8.6.20251014-R_231609**
exoxtrm-ingress	NA
fluent-bit	bom.ocir.io/bmvcldyxkwlg/fluent-bit: 100.0.14.20241213-R_171818-not found
fluentd	bom.ocir.io/bmvcldyxkwlg/fluentd-central-logger:100.0. 13.20241213-R_171815
gateway	**bom.ocir.io/bmvcldyxkwlg/gateway:6.8.6.20251014-R_231605**
ingress-nginix-controller	NA
init	NA

Component	Build URL
init-exoxtrmutils	NA
interaction-service	**bom.ocir.io/bmvcldyxkwlg/interaction-service: 6.8.10.20251014-R_231611**
k8tz	NA
kafka-patch	**bom.ocir.io/bmvcldyxkwlg/kafka-patch:6.8.6.20251014-R_231613**
logrotate(NA)	bom.ocir.io/bmvcldyxkwlg/logrotate:6.0.14.20241126- R_169000
node-logcleanup	bom.ocir.io/bmvcldyxkwlg/logcleanup-k8s-node:6.0.17 20241226-R_174107
postgres	NA
postgres-operator	NA
postgresql	v14
Citus version	v14
scheduler	**bom.ocir.io/bmvcldyxkwlg/scheduler:6.8.6.20251014-R_231606**
vault	NA
zabbix-server	zabbix-server: 7.2.0
zabbix-agent	zabbix-agent2: 7.2.0
patch	**bom.ocir.io/bmvcldyxkwlg/patch:6.8.15.20251016-R_232657**
Kafka	kafka-2.13-3.4.1_1.x86_64.rpm
Redis	redis-stack-server-6.2.6_v2-1.rhel8.rpm
Kafka-connect	bom.ocir.io/bmvcldyxkwlg/kafka-connect:v1
ksqldb(NA)	confluentinc/cp-ksqldb-server:latest
schema-registry	docker.io/bitnami/schema-registry:7.8.0-debian-12-r2
XMF	**bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework: 6.8.7.20251014-R_ 231621**
CCDP	**bom.ocir.io/bmvcldyxkwlg/ccdp:6.8.6.20251014-R_231623**
CQA	**bom.ocir.io/bmvcldyxkwlg/cqa:6.8.6.20251014-R_231622**

Component	Build URL
omni-ui	bom.ocir.io/bmvcldyxkwlg/omni-ui:6.8.16.20251017-R_233079

Note - Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle

Features List

- **Agent -Grouping Related Interactions (HR-165):**
  - **What it is:** Agents can now initiate a related interaction (e.g., start a call) directly from an ongoing interaction (e.g., a chat) via a new context menu in the left-hand-side (LHS) panel.
  - **Benefit:** This provides a seamless workflow for agents to switch modes (like chat to call) while maintaining the interaction history for continuity.
- **CQA Support with Voice Campaign (HR-641) (HR-736) (HR-728) (HR-718) (HR-735) (HR-696):**
  - **What it is:** The CQA (Quality Management) feature set is now extended to support voice campaigns.
  - **Benefit:** Agents can now view their Quality Profile details and average Quality Score for their completed voice calls (Inbound, Outbound, and Callback), giving them direct visibility into performance feedback.
  - **Documentation link (Internal):**

Security Fixes

- **HTML Injection | Improper Sanitization | Reports | 6x (GA-15221):**
  - **Problem:** A vulnerability existed in the "Add Report" section, where uploading a malicious .jrxml file could lead to HTML/JavaScript injection.
  - **Fix:** The application now properly sanitizes and encodes dynamic content from uploaded files to prevent persistent HTML injection, stored XSS, and UI

manipulation risks.

- **Improper Sanitization of Special Characters (GA-15345):**
  - **Problem:** The application was not properly sanitizing special characters, creating potential HTML Injection and XSS risks.
  - **Fix:** Strict input validation has been implemented on both the client and server sides to mitigate this vulnerability.

Benchmarking Tasks

- NA

Limitations and Known Issues

The following are known limitations or issues in this release:

- **EN-142448:** For inbound calls, the popup for multiple customers does not appear in the toolbar.
- **GA-14838:** Filterable and searchable columns are shown three times in the preview alternate number list.
- **GA-14853:** "Create and Dial" is not supported in the toolbar for the duplicate customer feature.
- **GA-14022:** The AddCustomerInfoToCRMUrl flag is working only at the system level.
- **EN-142553 | EN-140238:** SAML is not supported with the omni toolbar.
- **GA-14884:** Bell Notification not displayed after Churn (Preprod setup).
- **GA-14882:** Toolbar sometimes faces an "invalid number" issue during manual dial.
- **GA-14851:** Duplicate customer handling: Mouse arrow is shown on the preview customer screen.
- **GA-14843:** The Call Details screen under the Manage tab (Supervisor) is distorted.
- **GA-14842:** Transfer/Confer to user: Not able to select a queue in the queue list.
- **GA-14841:** Transfer/Confer to user: Queue list is shown when clicking on the campaign option.
- **GA-14534:** Blacklist feature: A number is only blocked if a zero is added before the number.

- **GA-14933:** Data is not updating in campaign_customer table after call disposition (Third-party masking setup is down).
- **GA-14932:** "Create and dial": Customer is created, but calling is not working (Third-party masking setup is down).
- **GA-14935:** Dial time Restriction at campaign level: Dial time is not updating in campaign_customer table for existing customers.
- **GA-14937:** user-disposition-retry setting: campaign_customer table is not updated based on the setting after call disposition.
- **GA-14958:** Conference Call Icon persists after the agent ends the conference.
- **GA-14956:** Supervisor can force logout an agent without providing a reason.
- **GA-15107:** During force login, the 1st user doesn't get logged out properly (Fix Not Received).
- **GA-15100:** Need a flag to persist error records in DB for lead upload.
- **GA-15053:** Bulk User Upload: Issues occur if column names or sequence are changed in the downloaded CSV, even after correct mapping.
- **GA-15098:** Non-Dialable feature is not working with callback.
- **EN-132681:** Excluded disposition feature is not working on the supervisor "manage contacts" page.
- **EN-141977:** A disabled filter at the system level is still working.
- **EN-140367:** A filter created at the system level but not assigned to a campaign is still applied to all legacy campaigns.
- **GA-15223:** Callback upload from Supervisor: If is_self_callback is false, the userId being passed should be bypassed instead of failing.
- **GA-15224:** Callback failure logs are not available in app server logs.
- **GA-15235:** Callback is not initiated if an agent is logged in but on break (Campaign callback).
- **EN-145356:** Agent screen: Complete "Contacts" data columns are not shown everywhere.
- **EN-145173:** MultiCCManager: Clicking the contact tab reverts to the main login screen.
- **EN-145660:** "Abandon At ACD" data is not dumping for Chat Queues when no agent is logged in.

- **EN-145484:** Closed Interactions: Search field not working with Customer Name.
- **GA-15313:** Customer searching issue: Searchable "name" column splits into two if the name has a space.
- **EN-146524:** Contacts tab (Admin/Supervisor) bulk upload: Complete data column fields are not shown for mapping.
- **EN-146522:** Messenger: mp3 and mp4 format support issue.
- **GA-15303:** WhatsApp and Messenger not tested in the same campaign. Unable to initiate WhatsApp outbound chat.
- **GA-15302:** Storage Azure: Transcript fails to send to Azure if multiple attachments are sent at a time.
- **HR-609:** Outbound Chat Summary is not generated.
- **HR-604:** Past interaction count and list are not showing when the CCDP flag is enabled.
- **HR-658:** Intent heading is not generated correctly in some conversations.
- **HR-642:** Case ID not getting updated in Journey.
- **HR-640:** A meaningful chat summary was not generated.
- **HR-633:** Summary sentiment does not match the interaction sentiment.
- **HR-614:** CQA scoring is sometimes not showing in the Closed Interaction tab.
- **HR-616:** CQA AI scoring should not be analyzed for unattended chats.
- **HR-631:** Supervisor should be able to perform manual scoring for all calls, regardless of AI scoring.
- **HR-646:** The screen gets blank after creating a duplicate Quality Profile.
- **HR-630:** When AI Analysis is disabled, those Quality Profile options should not appear on the AI Audit screen.
- **HR-629:** When Tasker is down, CQA score shows 'No Score Selected'.
- **HR-628:** Quality Profile Assignment/Creation option is showing twice on screen.
- **HR-613:** The supervisor is unable to save CQA manual scoring with comments.
- **EN-147340:** Messages not exchanged between agent and customer after reload during an ongoing chat.
- **GA-15474:** Negative UDH Wrap Time dumped for Auto-Transferred Chats.
- **GA-15421:** WhatsApp inbound chat: Customer name is not being saved.

- **GA-15503:** Call Details Report: Getting a blank report for masking campaigns if filtering by phone number (masked or unmasked).
- **GA-15452:** UDH dumping issue with voice and omni campaigns.

Customer Reported and Legacy Bugs Fixes

Monitoring Data and Reports

- **Stereo format in IP platform and Leg Platform (GA-15478) (EN-147824)**
  - **Problem:** The stereo recording format was not available in 6.x, which was a feature parity gap.
  - **Fix:** Stereo format support has now been added to the data-engine.
- **Call Details Report Filter for BYOK (GA-14665):**
  - **Problem:** The "Phone" filter in the Call Details report was not working for customers using BYOK (Bring Your Own Key), as encryption is managed at the process level.
  - **Fix:** A mandatory, single-select "Process" filter has been introduced. Users must now select a process (or "select_all") to enable the phone filter, which now works correctly for BYOK configurations.
  - **Note:** This fix is not supported in the Omni Call-details report.

Browser Version Support

- Version 141.0.7390.66 (Official Build) (arm64)

Reports Delivered

Verified Reports

The following reports were verified by QA for this release:

1. CALL History
2. CALL Details

3. ACD Abandon Call Detail Report
4. ACD Call Details
5. ACD Call Interval Summary
6. ACD Call Summary
7. AGENT Session Details
8. AGENT Productivity Summary
9. AGENT Productivity Interval Smmary
10. ACD Abandon Call Summary Report
11. QUEUE Performance Report
12. OMNI Call Details Report
13. OMNI Chat Detail Report
14. OMNI INTERACTION CALL History
15. OMNI INTERACTION Detail Report

Reports Not Delivered

The following reports are listed in the Reports tab but were not delivered in this cycle:

- INTERACTION Activity Daily Report
- FEEDBACK Report
- CHAT Channel Report
- TRANSITION Daily Report
- ACD Video Chat Details
- CRM Lead Details Report
- INTERACTION Service Level Report
- Supervisor-QA-GM Productivity Summary
- CRM Details Report
- ACD Abandon Video Chat Details Report
- Calls Quality Report
- VIDEO Chat History

- KYC Officer Quality Report
- Agent Productivity Summary for Video Chat
- AGENT Chat Report
- CHAT Agent Productivity Report
- KYC Request Activity Report
- KYC Request Summary Report
- KYC Request Date Wise Summary Report
- KYC Request Detail Report
- GROUP AGENT Productivity Summary
- GROUP AGENT Productivity Interval Summary
- Conference Report
- CALL Distribution Interval Summary
- GROUP AGENT Session Details
- LEAD Penetration
- CALL Distribution

Test Cases Executed

- NA

Hot Fixes

- NA Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels or reach out to your Customer Success Manager.

22.3.7. Contact Center - Patch Release Notes 6.8.1

Release Details

- **Release Date:** October 1, 2025

This document outlines the features, enhancements, bug fixes, and security updates for the ECC 6.8.1 release.

Highlights / Release Summary

This release introduces significant enhancements to the agent and administrator experience. Key highlights include the new **Omni-Experience Toolbar (Beta)** , which provides a unified, multi-channel workspace for agents, and the **Custom Toolbar Framework**, enabling greater flexibility for CRM integrations.

This patch also brings foundational architecture changes, including a **new XMF service for the Multi-Channel Framework** and support for **Redis Sentinel mode** for high availability. Administrators and supervisors benefit from **five new Omnichannel reports**, new configuration options for toolbars and call transfers , and new data tables for live monitoring.

Build Versions

The following component versions are included in this release.

Component	Build URL
amf	bom.ocir.io/bmvcldyxkwlg/amf:6.7.6.20250721-R_54847
appserver	**bom.ocir.io/bmvcldyxkwlg/appserver:6.8.7.20250930-R_227997**
appserver-ui	**bom.ocir.io/bmvcldyxkwlg/appserverui:6.8.2.20251001-R_228508**
applite	ExoApplite-6.4.1.20240801-R_153309.exe
art	**bom.ocir.io/bmvcldyxkwlg/art:6.8.2.20250930-R_228005**
art-dbquery	NA
asrouting	**bom.ocir.io/bmvcldyxkwlg/asrouting:6.8.4.20250930-R_227887**
chat-service	**bom.ocir.io/bmvcldyxkwlg/chat-service:6.8.5.20250930-R_227893**
citus-patch	**bom.ocir.io/bmvcldyxkwlg/citus-patch:6.8.4.20250930-R_227885**
cms	**bom.ocir.io/bmvcldyxkwlg/cms:6.8.7.20250930-R_227989**
cms-dbquery	NA
crm-connector	**bom.ocir.io/bmvcldyxkwlg/crm-connector:6.8.5.20250930-R_227883**
customer-fetcher	**bom.ocir.io/bmvcldyxkwlg/cfs:6.8.5.20250930-R_227877**
data-engine	**bom.ocir.io/bmvcldyxkwlg/dataengine:6.8.8.20251001-R_228413**
eureka	**bom.ocir.io/bmvcldyxkwlg/eureka:6.8.4.20250930-R_227884**
exoxtrm-ingress	NA
fluent-bit	bom.ocir.io/bmvcldyxkwlg/fluent-bit:100.0.14.20241213-R_171818 -not found
fluentd	bom.ocir.io/bmvcldyxkwlg/fluentd-central-logger:100.0.13.20241213-R_171815
gateway	**bom.ocir.io/bmvcldyxkwlg/gateway:6.8.4.20250930-R_227890**
ingress-nginix-controller	NA

Component	Build URL
init	NA
init-exoxtrmutils	NA
interaction-service	**bom.ocir.io/bmvcldyxkwlg/interaction-service:6.8.8.20250930-R_227879**
k8tz	NA
kafka-patch	**bom.ocir.io/bmvcldyxkwlg/kafka-patch:6.8.4.20250930-R_227886**
logrotate(NA)	bom.ocir.io/bmvcldyxkwlg/logrotate:6.0.14.20241126-R_169000
node-logcleanup	bom.ocir.io/bmvcldyxkwlg/logcleanup-k8s-node:6.0.17.20241226-R_174107
postgres	NA
postgres-operator	NA
postgresql	v14
Citus version	v14
scheduler	**bom.ocir.io/bmvcldyxkwlg/scheduler:6.8.4.20250930-R_227882**
vault	NA
zabbix-server	zabbix-server: 7.2.0
zabbix-agent	zabbix-agent2: 7.2.0
patch	**bom.ocir.io/bmvcldyxkwlg/patch:6.8.10.20251001-R_228510**
Kafka	kafka-2.13-3.4.1_1.x86_64.rpm
Redis	redis-stack-server-6.2.6_v2-1.rhel8.rpm
Kafka-connect	**bom.ocir.io/bmvcldyxkwlg/kafka-connect:v1**
ksqldb(NA)	**confluentinc/cp-ksqldb-server:latest**
schema-registry	**docker.io/bitnami/schema-registry:7.8.0-debian-12-r2**
XMF	**bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework:6.8.5.20250930-R_228020**

Component	Build URL
CCDP	**bom.ocir.io/bmvcldyxkwlg/ccdp:6.8.4.20250930-R_227891**
CQA	**bom.ocir.io/bmvcldyxkwlg/cqa:6.8.4.20250930-R_227894**
omni-ui	**bom.ocir.io/bmvcldyxkwlg/omni-ui:6.8.7.20251001-R_228703**

> **Note - Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle**

Features List

- **Create new patch service for XMF (EN-146855) :**
  - A new patch service, **XMF**, has been introduced to support the Multi-Channel Framework.
  - This new service replaces the previous AMF service, improving the backend support for omnichannel operations.

- **Restrict access to campaign context server preference flag (EN-145230) :**
  - Prevents agents from making incorrect selections during call transfers by hiding the "Default IVR" option when it's not relevant.
  - **How it Works:**
    - Previously, the "Default IVR" option was always visible during transfers, which could lead to agent errors.
    - A new flag, (`addDefaultIvrFeatureContextsForCampaign`) has been introduced in the `server_preference_store` to control the visibility of the Default IVR.
    - This can be configured globally (CC level) or for a specific campaign. The **campaign-level configuration has higher priority**.
    - **Impact:** This change only affects the displayed list of IVRs. Call transfer and routing functionality remain unchanged.

        - **Documentation Link (Internal)**

- **Voice data points parity for new FW (EN-145662)**
    - Provides new, consolidated data sources for Supervisor Live Monitoring and enables the creation of custom reports and dashboards in Superset.
    - **New Tables:** Three new tables have been introduced:
        - `disposition_summary__stats`
        - `productivity_summary__stats`
        - `Lead_information__stats`

- **Omni Toolbar | Harmony UI (Beta Version) (EN-146070)**
    - This release introduces the new **Omni-Experience Toolbar (Harmony UI)** in Beta. It is designed to give contact center agents a single, unified, and modern workspace directly in their platform toolbar, replacing older (e.g., 4.x) implementations.
    - By eliminating unnecessary app-switching and consolidating all key capabilities (interactions, history, contacts, callbacks, telephony, AI) for all channels (voice, chat, WhatsApp) into one intuitive interface, this new toolbar is designed to improve agent productivity and reduce Average Handling Time (AHT).
    - **In-Scope (Phase 1 Beta):**
        - Toolbar UI with UAD feature parity (excluding known Phase 1 omissions).
        - Multi-tab telephony handling and reload persistence.
        - Omni-channel interaction management (voice, chat, WhatsApp).
        - Core table components for interactions, contacts, and callbacks.
    - **Out-of-Scope (Phase 1 Beta):**
        - SSO login options (SAML, social login).
        - Column arrangement widget for tables.
        - Advanced analytics (planned for a future release).
        - Single Session WebRTC is not yet implemented.

- **Dump Device Info to Reports DB Mobile app or /app (EN-141642):**

- Support has been added to capture mobile device-specific information (e.g., model, OS version) in reports for sessions initiated from the mobile app or web app. This feature is controlled by a contact center-level flag to ensure device details are collected only when required.

  > **Note:** This capability is currently supported for Android devices only and is not yet available for iOS devices.

- **Call ID Accessibility for Auto-Dial Calls (EN-147067):**
  - The `callId` is now correctly passed as a global variable during auto-dial calls. This ensures that custom scripts and nodeflows can reliably access the call identifier for post-processing and integration workflows.

- **Support for Redis Sentinel Mode (EN-136747 & EN-136707):**
  - The application has been enhanced to support connecting to Redis in both "Normal" mode and high-availability "Sentinel" mode. A configuration flag determines which mode is used.
  - When Sentinel mode is enabled, the application will automatically connect to the Sentinel, find the master Redis node, and direct all write requests to it. This provides critical fault tolerance and automatic failover for Redis.
  - **Documentation Link (Internal)**

- **Omni-Toolbar Configuration at Process & Campaign Levels (EN-144766):**
  - The Omni-Toolbar configuration can now be applied at the Process and Campaign levels, providing granular control beyond the system-wide global settings. This allows administrators to create tailored toolbar layouts, ensuring agents only see the channels and tools relevant to their specific assignments.
  - **Benefits:** This enhancement improves agent focus, simplifies onboarding, and increases productivity by reducing UI clutter.
  - **Fallback Logic:** The system remains fully backward-compatible. If no specific Process or Campaign configuration is found, the system automatically applies the

global toolbar configuration.

- **Documentation link (Internal)**

- **Custom Toolbar Framework (EN-145912):**
  - Re-introduced and enhanced the Custom CRM Integration Framework. This powerful update enables internal teams and partners to develop, manage, and deploy custom CRM connectors independently, without direct dependency on the core product engineering team.
  - **Key Capabilities:**
    - **Modify Existing Connectors:** Override standard connectors (e.g., Salesforce, Zoho) with custom JavaScript-based logic.
    - **Build New Connectors:** Create entirely new CRM integrations with support for external libraries and Ameyo toolbar interaction points.
    - **Deployment & Management:** Upload, version, and restore custom integration files directly via the MultiCCManager UI.
    - **Versioning:** Supports multiple custom configurations of the same CRM type (e.g., different Zoho versions for different processes).
    - **Fallback:** Easily disable custom connectors to revert to default platform behavior.
  - **Out of Scope:**
    - .Enabling each toolbar to have its own distinct set of custom UI features and SSO configurations.
    - Adding server-side dumping capabilities for entirely new, custom integration types.
    - **Note:** This release includes support for custom toolbars integrated with Salesforce CRM.
    - **Documentation Link (Internal)**

- **New Omnichannel Reports (EN-146322):**
  - Introduced five new default reports to provide comprehensive insights into omnichannel performance. These reports provide richer, more accurate visibility

into omnichannel interactions and productivity from both the customer (interaction summary) and agent (agent productivity) perspectives.
    - Channel Summary
    - Interaction Summary
    - ACD Interaction Summary
    - Campaign Omni APR
    - CC Omni APR

The reports leverage the omni_interaction_denormalized_interval_5_min truth table to populate two key statistics tables:

- interaction_summary__stats, representing the customer perspective
- agent_productivity_omni_summary__stats, representing the agent perspective

- **Agent Self-Monitoring for Omnichannel (EN-145892):**

The Agent Self-Monitoring Dashboard, previously available only for voice campaigns, has now been extended to support omnichannel campaigns. Agents can access their omnichannel performance metrics via the /omniapp interface.

Technical Tasks

No technical tasks are included in this release.

Security Fixes

- **Hardcoded PostgreSQL Credentials Leaked (GA-15225):**
    - **Issue:** The Art API response contained hardcoded PostgreSQL credentials (username: postgres, password: password), posing a significant security risk.
    - **Resolution:** This issue is addressed in the latest Reports and Stats build. The password is no longer exposed in API responses.
- **GA-15226: Application Allows Unrestricted File Upload (CFS)**

- **Issue:** The application accepted file uploads without validating content type or file contents, which could allow for malicious code execution and system compromise.
- **Resolution:** Validation has been implemented on the CFS side to resolve this vulnerability.

Benchmark Tasks

Benchmarking tasks are not applicable to this release.

Debugging and Monitoring Tasks

- **Debugging Docs / SOPs:** NA
- **Monitoring Tasks:** NA

Limitations and Known Issues

The following are known issues, limitations, and known facts for this release:

- **EN-142448:** Popup for multiple customers does not appear in the toolbar for inbound calls.
- **EN-142553 | EN-140238:** SAML SSO is not supported with the Omni toolbar.
- **GA-14853:** "Create and Dial" is not supported in the toolbar for the duplicate customer feature.
- **GA-14022:** The AddCustomerInfoToCRMUrl flag only works at the system level.
- **GA-14534:** The Blacklist feature only blocks a number if a zero is added before it.
- **GA-14933:** campaign_customer table is not updating after call disposition, allowing the same number to be dialed infinitely (related to third-party masking setup).
- **GA-14932:** "Create and Dial" creates the customer, but calling fails (related to third-party masking setup).
- **GA-15053 (Bulk User Upload):** Uploads fail if column names or sequence are changed in the downloaded CSV, even if mapped correctly.
- **GA-15107:** During force login, the first user is not logged out properly (Fix Not Received).
- **GA-15098:** "Non-Dialable" setting is not working with callbacks.

- **GA-15223:** Callback upload from Supervisor fails with a user ID mismatch when is_self_callback is false.
- **GA-15224:** Callback failure logs are not available in app server logs.
- **GA-15235:** Campaign callbacks are not initiated if the agent is logged in but on a break.
- **EN-145660:** "Abandon At ACD" data is not dumping for Chat Queues when no agent is logged in.
- **EN-146522:** Issues with mp3 and mp4 format support in Messenger.
- **GA-15303:** Unable to test WhatsApp and Messenger in the same campaign due to an issue initiating outbound WhatsApp chats.
- **EN-147340:** Messages are not exchanged between agent and customer if a reload occurs during an ongoing chat.
- **GA-15474:** Negative UDH Wrap Time is being dumped in omni_interaction_denormalised_interval_5_min for auto-transferred chats.
- **CQA/AI Issues:**
  - **HR-604:** Past interaction count/list not showing when CCDP flag is enabled.
  - **HR-609:** Outbound Chat Summary is not generated.
  - **HR-640:** Meaningful chat summary not generated based on conversation.
  - **HR-614:** CQA scoring sometimes not showing in Closed Interaction tab.
  - **HR-616:** CQA AI scoring is incorrectly analyzing unattended chats.
  - **HR-613:** Supervisor is unable to save CQA manual scoring with comments.

Customer Reported and Legacy Bugs Fixes

System Common Bugs

- **Character length check for userId (GA-15199):**
  - **Issue:** The User ID field had no character limit, causing the user deletion API to fail for long IDs (>1000 characters). This was a legacy issue.
  - **Fix:** A **75-character limit** is now enforced in both the UI and backend for the User ID field.

Voice

- **Mobile Number Display Privacy Concern (SL-17486):**
  - **Issue:** In Supervisor Live Monitoring, the Waiting List displayed the original phone number in the Name column for unknown (unregistered) customers, even when number masking was enabled.
  - **Fix:** The Name column will no longer display the phone number; it will remain blank for unregistered customers to protect privacy.
- **Unable to Add Caller ID in Campaign Settings (SL-17435):**
  - **Issue:** Admins received an error when trying to add or update the Caller ID field in the Admin UI for campaign settings.
  - **Fix:** The Caller ID field is now functional. Admins can configure the DID here for agent visibility, while the customer-facing DID remains controlled by the DID Pool or Nodeflow.
- **Telephony Panel Inactive After Auto-Dispose (SL-17546):**
  - **Issue:** When a call was auto-disposed (e.g., due to wrap timeout), the UI would lock up because the modal backdrop was not removed, forcing the agent to reload.
  - **Fix:** The code now properly removes the modal backdrop, allowing users to continue working without a reload.

Monitoring Data and Reports

- **Data Engine OOM Crash from Non-UTF Characters (GA-15157):**
  - **Issue:** The Data Engine service crashed with an Out of Memory (OOM) error due to processing usernames with non-ASCII or non-breaking space characters. This also caused agent names to display as ? in the Supervisor Live Monitoring UI.
  - **Fix:** The CMS microservice now enforces **UTF-8 encoding** and replaces non-breaking spaces with normal spaces, resolving both the OOM crashes and the UI display issue.

Browser Version Support

- Version 140.0.7339.208 (Official Build) (arm64)

Reports Delivered

Verified Reports

The following 15 reports were verified by QA for this release:

1. CALL History
2. CALL Details
3. ACD Abandon Call Detail Report
4. ACD Call Details
5. ACD Call Interval Summary
6. ACD Call Summary
7. AGENT Session Details
8. AGENT Productivity Summary
9. AGENT Productivity Interval Summary
10. ACD Abandon Call Summary Report
11. QUEUE Performance Report
12. OMNI Call Details Report
13. OMNI Chat Detail Report
14. OMNI INTERACTION CALL History
15. OMNI INTERACTION Detail Report

Not Delivered

The following reports are present in the UI but were not delivered/verified in this patch.

1. INTERACTION Activity Daily Report
2. FEEDBACK Report
3. CHAT Channel Report
4. TRANSITION Daily Report
5. ACD Video Chat Details
6. CRM Lead Details Report

7. INTERACTION Service Level Report
8. Supervisor-QA-GM Productivity Summary
9. CRM Details Report
10. ACD Abandon Video Chat Details Report
11. Calls Quality Report
12. VIDEO Chat History
13. KYC Officer Quality Report
14. AGENT PRODUCTIVITY SUMMARY FOR VIDEO CHAT
15. AGENT Chat Report
16. CHAT Agent Productivity Report
17. KYC Request Activity Report
18. KYC Request Summary Report
19. KYC Request Date Wise Summary Report
20. KYC Request Detail Report
21. GROUP AGENT Productivity Summary
22. GROUP AGENT Productivity Interval Summary
23. Conference Report
24. CALL Distribution Interval Summary
25. GROUP AGENT Session Details
26. LEAD Penetration
27. CALL Distribution

Hot Fixes

The following urgent fixes were deployed after the initial 6.8.1 release.

HF1: Dated: October 13, 2025

- **HR-755: CQA Voice Interaction Dashboard Data Not Populating**

    - **Issue:** Data was not being saved to the `interaction_qa*` tables, which caused the CQA Voice Interaction Dashboard to appear empty.
    - **Root Cause:** The data streams (INTERACTION_QA_PENDING_STREAM, INTERACTION_QA_COMPLETED_STREAM) were created with a replication factor of 1. This conflicted with the ksqlDB default setting (min.insync.replicas=2), which ensures data durability. This mismatch caused all write operations to fail with a TimeoutException, leaving the topics empty.
    - **Fix:** The incorrect REPLICAS=1 setting was removed from the CREATE STREAM statement. The streams now use the setup's default replication factor, allowing data to flow correctly.
    - **Build Tag:** bom.ocir.io/bmvcldyxkwlg/patch-non-prod:6.8.11.20251010-R_230698
- **EN-147990: Default Agent Ringing Tone Volume Reduced**
    - **Issue:** The default ringing tone in the 6.x setup was excessively loud for agents.
    - **Fix:** A new UI build was released containing a new ringing tone file with a reduced volume.
    - **Note:** This change only applies to the **voice toolbar and voice /app**. It does **not** affect the Omni UAD, Omni toolbar, or mobile app.
    - **Build Tag:** bom.ocir.io/bmvcldyxkwlg/appserverui:6.8.2.20251013-R_231382
- **SL-17624: Investigation into "Agents Can't End Call" Issue**
    - **Issue:** An intermittent issue was reported where agents were unable to end calls.
    - **Action:** This build adds enhanced logging to help diagnose the issue. The root cause is suspected to be intermittent delays in API authentication or a Redis call under heavy load.
    - **Impact:** This change is for diagnostic purposes only and has **no functional impact** on users.
    - **Build Tag:** bom.ocir.io/bmvcldyxkwlg/appserver:6.8.8.20251013-R_231163

HF2: Dated: October 15, 2025

- **SL-17551: "Longest call duration" Statistic Frozen on Dashboard**

- **Issue:** On the agent-self-monitoring dashboard, the "Longest call duration" statistic was stuck at 5 minutes and would not update.
- **Root Cause:** A null pointer exception in the data engine was causing lag and preventing the dashboard data from refreshing.
- **Fix:** The underlying issue causing the exception has been resolved.
- **Build Tag:** bom.ocir.io/bmvcldyxkwlg/dataengine:6.8.13.20251015-R_232159

Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels or reach out to your Customer Success Manager.

22.3.8. Contact Center - Patch Release Notes 6.8.0

Release Details

Release Date: August 29, 2025

This document outlines the features, enhancements, bug fixes, and security updates for the ECC 6.8.0 release.

Highlights / Release Summary

This release focuses on enhancing system resilience with new failover logic for both call servers and app servers. It introduces key usability features, including support for "+" in DIDs , configurable incoming call contexts , and a new 'Transfer to Campaign' API.

Additionally, this version includes a beta for **WhatsApp and Messenger integration** via the XMF framework, new Omni UAD enhancements like **AppSDK for CRM integration** , and significant technical upgrades to logging with Fluent Bit sidecars and PostgreSQL database replication.

Build Versions

The components and their corresponding build versions for this release are listed below:

Component	Build URL
amf	bom.ocir.io/bmvcldyxkwlg/amf:6.7.6.20250721-R_54847
appserver	**bom.ocir.io/bmvcldyxkwlg/appserver:6.8.2.20250829-R_219593**
appserver-ui	**bom.ocir.io/bmvcldyxkwlg/appserverui:6.8.1.20250829-R_219575**
applite	ExoApplite-6.4.1.20240801-R_153309.exe
art	**bom.ocir.io/bmvcldyxkwlg/art:6.8.1.20250828-R_219308**
art-dbquery	NA
asrouting	**bom.ocir.io/bmvcldyxkwlg/asrouting:6.8.1.20250825-R_218157**
chat-service	**bom.ocir.io/bmvcldyxkwlg/chat-service:6.8.2.20250826-R_218699**
citus-patch	**bom.ocir.io/bmvcldyxkwlg/citus-patch:6.8.1.20250825-R_218164**
cms	**bom.ocir.io/bmvcldyxkwlg/cms:6.8.2.20250825-R_218425**
cms-dbquery	**NA**
crm-connector	**bom.ocir.io/bmvcldyxkwlg/crm-connector:6.8.1.20250825-R_218166**
customer-fetcher	**bom.ocir.io/bmvcldyxkwlg/cfs:6.8.1.20250825-R_218162**
data-engine	**bom.ocir.io/bmvcldyxkwlg/dataengine:6.8.4.20250829-R_219599**
eureka	**bom.ocir.io/bmvcldyxkwlg/eureka:6.8.1.20250825-R_218211**
exoxtrm-ingress	NA
fluent-bit	bom.ocir.io/bmvcldyxkwlg/fluent-bit:100.0.14.20241213-R_171818 -not found
fluentd	bom.ocir.io/bmvcldyxkwlg/fluentd-central-logger:100.0.13.20241213-R_171815
gateway	**bom.ocir.io/bmvcldyxkwlg/gateway:6.8.1.20250825-R_218155**
ingress-nginix-controller	NA
init	NA

Component	Build URL
init-exoxtrmutils	NA
interaction-service	**bom.ocir.io/bmvcldyxkwlg/interaction-service:6.8.4.20250827-R_218996**
k8tz	NA
kafka-patch	**bom.ocir.io/bmvcldyxkwlg/kafka-patch:6.8.1.20250825-R_218213**
logrotate(NA)	bom.ocir.io/bmvcldyxkwlg/logrotate:6.0.14.20241126-R_169000
node-logcleanup	bom.ocir.io/bmvcldyxkwlg/logcleanup-k8s-node:6.0.17.20241226-R_174107
postgres	NA
postgres-operator	NA
postgresql	v14
Citus version	v14
scheduler	**bom.ocir.io/bmvcldyxkwlg/scheduler:6.8.1.20250825-R_218156**
vault	NA
zabbix-server	zabbix-server: 7.2.0
zabbix-agent	zabbix-agent2: 7.2.0
patch	**bom.ocir.io/bmvcldyxkwlg/patch:6.8.5.20250828-R_219380**
Kafka	kafka-2.13-3.4.1_1.x86_64.rpm
Redis	redis-stack-server-6.2.6_v2-1.rhel8.rpm
Kafka-connect	**bom.ocir.io/bmvcldyxkwlg/kafka-connect:v1**
ksqldb(NA)	**confluentinc/cp-ksqldb-server:latest**
schema-registry	**docker.io/bitnami/schema-registry:7.8.0-debian-12-r2**
XMF	**bom.ocir.io/bmvcldyxkwlg/xtrmmessaggingframework:6.8.3.20250828-R_219333**
CCDP	**bom.ocir.io/bmvcldyxkwlg/ccdp:6.8.1.20250825-R_218158**
CQA	**bom.ocir.io/bmvcldyxkwlg/cqa:6.8.1.20250825-R_218165**

> **Note - Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle**

Features List

- **Redundant Call server within one appserver (EN-144276):**
  - **What it is:** Implemented robust failover logic for environments with multiple call servers (e.g., AppServer-0 with CS1/CS2).
  - **Benefit:** Ensures high availability. If one call server fails, calls are automatically routed to the active server. This provides uninterrupted service, zero call drops, and correct logging, all while maintaining Round Robin load balancing when servers are healthy.
- **App server Failover auto switch when db is down (EN-144290):**
  - **What it is:** A mechanism that automatically reassigns clusters to a healthy application server if the primary database becomes unavailable.
  - **Benefit:** Improves system resilience. The app server connected to the failed database is marked unhealthy, and its cluster is remapped to an active server. Users can continue to log in and work without manual intervention.
- **Support of + in DID (GA-15012):**
  - **What it is:** The system now supports configuring DIDs and CallerID pools with a "+" symbol. For incoming calls, the "+" is removed from the DID to ensure it resolves correctly against the configured DIDs.
  - **Benefit:** Simplifies configuration and eliminates the need for extra scripting at the call-context level to handle the "+" symbol.

- **Resolving incoming call context per cc (GA-15033):**
  - **What it is:** Provides support for selecting a specific inbound call context based on configuration for each Contact Center (CC).
  - **Benefit:** Previously, the context was chosen randomly. Now, admins can assign a default context per CC, allowing for customized scripting (like handling the "+"

symbol) that is specific to one CC.
    - **Activation:** This feature must be enabled by inserting a record into the server_preference_store table.
- **Create Calls API endpoint for app server voice call API standardisation (EN-143990):**
    - **What it is:** Exposes the "transfer to campaign" functionality as a public API for customer use.
    - **Benefit:** Allows external systems or third-party applications to programmatically transfer a live call into a specific campaign.
    - **Limitations:**
        - The API supports Basic Auth, OAuth 2.0, and JWT tokens.
        - A token generated for one CC can currently be used in another CC.
        - Supports transfers to campaigns within the same CC and same app server only.
        - Rate limiting is not currently implemented for this API.
- **WhatsApp and Messenger Integration (Beta) (EN-143809):**
    - **What it is:** This beta feature introduces support for Facebook Messenger and WhatsApp channels via the XMF (Xtrm Messaging Framework).
    - **Benefit:** Provides a scalable framework for adding new digital channels. This update includes horizontal scaling for AMF, UI handling for new channel icons, and support for international numbers with XMF.
    - **Notes & Limitations:**
        - CCDP & CQA have not been tested with Messenger chat.
        - The chat_toolbar_info endpoint must be updated to the new XMF webhook URL.
        - **Attachments:** Supports pdf, csv, png, jpg, jpeg . mp3 and mp4 files are not working properly.
        - **Not Supported:** Messenger feedback , customer resolution with Messenger , read receipts , BYOK with XMF , Messenger with bot , or using Messenger and WhatsApp in the same campaign.
    - **Design Doc Link (Internal)**
    - **Doc-link1 , link2 (Internal)**

- **Omni Data Points - Admin/Supervisor (EN-145067):**
    - **What it is:** A new Default Supervisor Dashboard implemented using Superset.
    - **Benefit:** Gives supervisors comprehensive, real-time insights into agent performance, queue status, and call-handling efficiency.

- **CRM URL Integration in Omni UAD (EN-143924):**
    - **What it is:** Implements AppSDK in the Omni Universal Agent Desktop (UAD) to allow CRMs to be embedded within the application.
    - **Benefit:** Agents can now work with an embedded CRM (in an iframe) without switching screens. This enables instant data exchange between the two systems. The CRM URL can be configured via the Admin portal.

- **QA Testing: App SDK for Omni UAD (EN-145878):**
    - **What it is:** Enhances the Ameyo Integration Framework with OmniSDK.
    - **Benefit:** Makes it easier to connect Ameyo with third-party systems like CRMs or custom applications. This provides faster, more reliable, real-time data sharing between Ameyo and connected tools.

ARD -ISD task

- **DB Replication in postgres running as POD in K8s excluding Ameyodb (EN-144209):**
    - **What it is:** A replica of the databases (excluding ameyodb) is now maintained inside the Postgres-Instance POD.
    - **Benefit:** This ensures faster recovery and higher data resiliency in case of a database issue.
- **Vault Pod Redundancy (EN-144196):**
    - **What it is:** HashiCorp Vault is now configured to run in High Availability (HA) mode.
    - **Benefit:** This setup uses AWS KMS for the auto-unseal feature , ensuring true redundancy and high availability for secrets management without requiring

manual intervention.
    - **Documentation link1, link2 (Internal)**

- **Log collector and host mount change -- fluentbit as SideCar -- Verify the Central logs for each component (Fluent Bit Sidecar) (EN-143086, GA-14975):**
    - **What it is:** A Fluent Bit sidecar container is now deployed with each application pod to handle log forwarding. Application logs are written to an ephemeral emptyDir volume (/log).
    - **Benefit:** This approach optimizes disk usage, prevents issues from stale logs, and improves scalability. Logs are automatically cleaned up when a pod is deleted. This update also ensures that chat-service logs, which were previously missing, are now sent to the central logger.

Security Fixes

- NA

Benchmarking Tasks

- NA

Debugging and Monitoring Tasks

- **Debugging Docs / SOPs:** NA
- **Monitoring Tasks:** NA

Limitations and Known Issues

The following are known limitations or issues in this release:

- **EN-142448:** For inbound calls, the popup for multiple customers does not appear in the toolbar.
- **GA-14838:** Filterable and searchable columns are shown three times in the preview alternate number list.

- **GA-14853:** "Create and Dial" is not supported in the toolbar for the duplicate customer feature.
- **GA-14022:** The AddCustomerInfoToCRMUrl flag is working only at the system level.
- EN-142553 | EN-140238: SAML is not supported with the omni toolbar.
- **GA-14884:** Bell Notification not displayed after Churn (Preprod setup).
- **GA-14882:** Toolbar sometimes faces an "invalid number" issue during manual dial.
- **GA-14851:** Duplicate customer handling: Mouse arrow is shown on the preview customer screen.
- **GA-14843:** The Call Details screen under the Manage tab (Supervisor) is distorted.
- **GA-14842:** Transfer/Confer to user: Not able to select a queue in the queue list.
- **GA-14841:** Transfer/Confer to user: Queue list is shown when clicking on the campaign option.
- **GA-14534:** Blacklist feature: A number is only blocked if a zero is added before the number.
- **GA-14933:** Data is not updating in campaign_customer table after call disposition, allowing the same number to be dialed infinitely (Third-party masking setup is down).
- **GA-14932:** "Create and dial": Customer is created, but calling is not working (Third-party masking setup is down).
- **GA-14935:** Dial time Restriction at campaign level: Dial time is not updating in campaign_customer table for existing customers.
- **GA-14937:** user-disposition-retry setting: campaign_customer table is not updated based on the setting after call disposition.
- **GA-14958:** Conference Call Icon persists after the agent ends the conference.
- **GA-14956:** Supervisor can force logout an agent without providing a reason.
- **GA-15107:** During force login, the 1st user doesn't get logged out properly (Fix Not Received).
- **GA-15100:** Need a flag to persist error records in DB for lead upload.
- **GA-15053:** Bulk User Upload: Issues occur if column names or sequence are changed in the downloaded CSV, even after correct mapping.
- **GA-15098:** Non-Dialable feature is not working with callback.

- **EN-132681:** Excluded disposition feature is not working on the supervisor "manage contacts" page.
- **EN-141977:** A disabled filter at the system level is still working.
- **EN-140367:** A filter created at the system level but not assigned to a campaign is still applied to all legacy campaigns.
- **GA-15223:** Callback upload from Supervisor: If is_self_callback is false, the userId being passed should be bypassed instead of failing.
- **GA-15224:** Callback failure logs are not available in app server logs.
- **GA-15235:** Callback is not initiated if an agent is logged in but on break (Campaign callback).
- **EN-145356:** Agent screen: Complete "Contacts" data columns are not shown everywhere in the contacts tab and live interactions.
- **EN-145173:** MultiCCManager: Clicking the contact tab reverts to the main login screen.
- **EN-145660:** "Abandon At ACD" data is not dumping for Chat Queues when no agent is logged in (Queue Monitoring).
- **EN-145484:** Closed Interactions: Search field not working with Customer Name.
- **GA-15313:** Customer searching issue: Searchable "name" column splits into two if the name has a space.
- **EN-146524:** Contacts tab (Admin/Supervisor) bulk upload: Complete data column fields are not shown for mapping.
- **EN-146522:** Messenger: mp3 and mp4 format support issue.
- **GA-15303:** WhatsApp and Messenger not tested in the same campaign. Unable to initiate WhatsApp outbound chat.
- **GA-15302:** Storage Azure: Transcript fails to send to Azure if multiple attachments are sent at a time.
- **HR-609:** Outbound Chat Summary is not generated.
- **HR-604:** Past interaction count and list are not showing when the CCDP flag is enabled.
- **HR-658:** Intent heading is not generated correctly in some conversations.
- **HR-642:** Case ID not getting updated in Journey.
- **HR-640:** A meaningful chat summary was not generated.
- **HR-633:** Summary sentiment does not match the interaction sentiment.

- **HR-614:** CQA scoring is sometimes not showing in the Closed Interaction tab.
- **HR-616:** CQA AI scoring should not be analyzed for unattended chats.
- **HR-631:** Supervisor should be able to perform manual scoring for all calls, regardless of AI scoring.
- **HR-646:** The screen gets blank after creating a duplicate Quality Profile.
- **HR-630:** When AI Analysis is disabled, those Quality Profile options should not appear on the AI Audit screen.
- **HR-629:** When Tasker is down, CQA score shows 'No Score Selected'.
- **HR-628:** Quality Profile Assignment/Creation option is showing twice on screen.
- **HR-613:** The supervisor is unable to save CQA manual scoring with comments.
- Internal chat disabled.

Customer Reported and Legacy Bugs Fixes

Voice

- **CMS Pod Crash (GA-15059):**
  - **Problem:** The CMS pod crashed because editing or uploading a single nodeflow caused the system to cache *all* nodeflows in that campaign.
  - **Fix:** The system has been modified to only update the specific nodeflow related to the event, significantly reducing the load on CMS.
- **Configuration Delimiter (GA-15197):**
  - **Problem:** The allowed.vr.ids configuration used a semicolon (;) as the delimiter.
  - **Fix:** The delimiter has been updated to a comma (,) for consistency. Example: allowed.vr.ids: 0: "1,3".

Monitoring Data and Reports

- **Azure Voicelog Archiving (GA-15271):**
  - **Problem:** Voicelogs created "with legs" were not being uploaded to Azure storage devices.

- **Fix:** This implementation gap was identified and has been fixed in the latest data-engine build.

- **Missing Re-ACD Calls in Reports (SL-17312):**
  - **Problem:** Calls that re-entered the ACD queue (ReACD) were not appearing in call history reports.
  - **RCA:** A UDH_ID was not being created for FAILED_ACD_ASSOCIATION_EVENT (i.e., when a ReACD call failed to connect to an agent).
  - **Fix:** The data engine has been updated to persist a UDH_ID for both DISPOSING_CALL and FAILED_ACD_ASSOCIATION_EVENT. This ensures all ReACD attempts are correctly recorded in the reports.

Omni Campaign - Voice and Chat Interactions

- **Customer Resolution for Webchat (EN-145409):**
  - **Problem:** Customer resolution (matching) was not working for webchat when CRM sync was off, specifically when an email address was used as the identifier.
  - **Fix:** An email identifier column has been added to the omni column mapping to allow matching via email.
  - **Action Required:** For this feature to work on existing processes, the searchable_emails and messenger_unique_id columns must be manually added to all active Omni process data tables. A patch will be provided later.
- **CQA Enhancement (EN-144525):**
  - **Enhancement:** This update enhances quality management by introducing AI-based analysis (CCDP & CQA) for Voice and Chat (Webchat/WhatsApp). It also adds new "Interaction Details" and "Customer Details" pages for better visibility during audits.
- **Harmony UI - AI Summary (EN-145824):**
  - **Enhancement:** This feature provides agents with AI-powered summaries of past customer interactions. This allows agents to quickly understand customer history, intent, and sentiment without reading full transcripts, reducing handle time. This has been tested with Voice and Chat (Webchat/WhatsApp).

Browser Version Support

- Version 139.0.7258.128 (Official Build) (arm64)

Reports Delivered

Verified Reports

The following reports were verified by QA for this release:

1. CALL History
2. CALL Details
3. ACD Abandon Call Detail Report
4. ACD Call Details
5. ACD Call Interval Summary
6. ACD Call Summary
7. AGENT Session Details
8. AGENT Productivity Summary
9. AGENT Productivity Interval Summary
10. ACD Abandon Call Summary Report
11. QUEUE Performance Report
12. OMNI Call Details Report
13. OMNI Chat Detail Report
14. OMNI INTERACTION CALL History
15. OMNI INTERACTION Detail Report

Reports Not Delivered

The following reports are listed in the Reports tab but were not delivered in this cycle:

- INTERACTION Activity Daily Report
- FEEDBACK Report
- CHAT Channel Report

- TRANSITION Daily Report
- ACD Video Chat Details
- CRM Lead Details Report
- INTERACTION Service Level Report
- Supervisor-QA-GM Productivity Summary
- CRM Details Report
- ACD Abandon Video Chat Details Report
- Calls Quality Report
- VIDEO Chat History
- KYC Officer Quality Report
- AGENT PRODUCTIVITY SUMMARY FOR VIDEO CHAT
- AGENT Chat Report
- CHAT Agent Productivity Report
- KYC Request Activity Report
- KYC Request Summary Report
- KYC Request Date Wise Summary Report
- KYC Request Detail Report
- GROUP AGENT Productivity Summary
- GROUP AGENT Productivity Interval Summary
- Conference Report
- CALL Distribution Interval Summary
- GROUP AGENT Session Details
- LEAD Penetration
- CALL Distribution

Test Cases Executed

- NA

Hot Fixes

- **Auto Dial CallID (EN-147067):**
  - **Fix:** As part of story EN-143990, the callId is now passed in global variables for Auto Dial Calls.
  - **Build:** bom.ocir.io/bmvcldyxkwlg/appserver:6.8.3.20250905-R_220724
- **Mobile Number Privacy (SL-17486):**
  - **Problem:** On the supervisor UI, if a customer was not found in the database, their phone number was displayed in the "name" column of the waiting list.
  - **Fix:** The name column will now be displayed as empty if no customer is found, protecting the privacy of the number.
  - **Build:** bom.ocir.io/bmvcldyxkwlg/appserver:6.8.4.20250909-R_221719
- **Browser Storage (GA-15381):**
  - **Problem:** Browser storage (Local/Session Storage) in the /newapp application was not functioning correctly, causing data persistence issues.
  - **Fix:** This issue has been resolved, ensuring data is stored and retrieved as expected.
  - **Build:** bom.ocir.io/bmvcldyxkwlg/appserverui:6.8.1.20250916-R_223746

Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels or reach out to your Customer Success Manager.

22.4. 4.13 Release Notes

22.4.1. Contact Center - Patch Release Notes - Version 4.13.48

Release Details

Release Date: 23rd-Feb-2026

Build Versions

Key versions included in this release are:

Component	Build URL
ameyo-server	**ameyo-server-4.13.623.20260219-R_274505-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.104.20260223-R_275748-linux-gtk.x86_64.rpm**
management-server	ameyo-management-server-3.15.128.20220819-R_53820.x86_64
management-UI	ameyo-management-server-ui-3.15.79.20220825-R_54354.x86_64
ameyo-asterisk	ameyo-asterisk13-100.0.123.20230202-R_54429_el7-linux-gtk.x86_64.rpm ameyo-asterisk13-100.0.122.20230201-R_77845_el8.x86_64.rpm
ameyo-asap	ameyo-asap-100.0.19.20210708-R_53436-linux-gtk.x86_64.rpm ameyo-asap-100.0.31.20231212-R_122778_el8-linux-gtk.x86_64.rpm
ameyo-djinn	ameyo-djinn-100.0.411.20250115-R_176400.x86_64.rpm
ameyo-codec	ameyo-codecs13-100.0.10.20180312-R_37320.i386.rpm ameyo-codecs16-3.10.1-20150917-linux-gtk.x86_64.rpm
ameyo-crm	ameyocrm-100.0.379.20240516-R_54694.x86_64.rpm
JDK	java-1.8.0-amazon-corretto-devel-1.8.0_312.b07-1.x86_64.rpm
CAF Google Play Store	caf_googlePlay-100.0.37.20231011-R_112974.x86_64.rpm
CAF Youtube	caf_youtube-100.8.0.20230904-R_54528.x86_64.rpm
UI Less Integration - Zoho Connector laravel build	zoho-connector-100.0.36.20230817-R_104650.x86_64.rpm

Component	Build URL
UI Less Integration - Zoho User Management app	zoho_CRM_Connector-100.0.10-R_54327.aaex
WFM NICE Response Transformation App	NICE_Connector_App-100.0.13-R_54375.aaex
AMF for whatsapp, cogno and Instagram integration	AMF-100.0.272.20250916-R_54869.x86_64.rpm
Voicelog Privilege App	Voice_Log_Privilege_App-100.0.61-R_54105.aaex
Dial User App	Dial_User_App-100.0.31-R_51344.aaex
System Smart View App	Smart_User_App-100.0.135-R_54858.aaex
PIck Call App	pick_Call_App-100.0.36-R_51381.aaex
Bulk Operation App	Bulk_operation-100.0.48-R_51285.aaex
Desktop Notification App	NotificationApp-100.0.29-R_52192.aaex
Agent Signature App	Agent_signature_app-100.0.27-R_51283.aaex
Agent Self Monitoring App	Agent_Self_Monitoring-100.1.98-R_51265.aaex
Redirection App	RedirectionApp-100.0.3-R_51489.aaex
Quota App	quota_management_app-100.0.74-R_54362.aaex
Skill Monitoring App	skill_monitoring_app-100.0.14-R_54167.aaex
Routing Test App	RoutingTest-100.0.1-R_54180.aaex
Debugger App	DebuggerApp-100.0.7-R_54338.aaex
ACP	acp-100.1.92.20231130-R_120901.x86_64.rpm
amd	ameyo-amd16-100.0.31.20210521-R_52916-linux-gtk.i386.rpm
zabbix	ameyo-zabbix-100.0.127.20221115-R_63336.el7.x86_64.rpm ameyo-zabbix-agent-100.0.54.20210617-R_53204.x86_64.rpm

Component	Build URL
failover	ameyo-failover-100.0.29.20230504-R_89111.x86_64.rpm
Video micro service	video-4.13.110.20240304-R_133174.x86_64.rpm
Voice Agent mobile app	Android - Voice Agent App 5.7.5-R (Voice-Agent-5.7.4.20211011-release.apk) Ios - Voice Agent App 3.3
Field Agent mobile app	Android - Field Agent App 5.4-R (ameyo.fieldagent.com-5.4.20230905-release.apk) Ios - Field Agent App version 3.3
Supervisor mobile app	Android - Supervisor App : com.ameyo.supervisor-2.1.20210812-release.apk Ios - moved to live on apple store
grafana	grafana-7.1.4-1x86_64.rpm
SFDC Integration app	CRM_Integration-100.0.8-R_54454.aaex

Note - Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle

Features & Enhancements

- **EN-706 || IP and Domain Whitelisting for shared 4X stamps**

  Domain whitelisting behavior has been validated across multiple scenarios with and without gatewayPublicBaseUrl configuration.

  - gatewayPublicBaseUrl acts as a global override.
  - CC-level whitelisting is validated only after global domain validation passes.
  - Multi-domain access on the same app server is not supported when a single gatewayPublicBaseUrl is configured.

- **EN-934/EN-356 || Secure Cloud Mounting Options for Call Recordings (Key-based SFTP & IAM-based S3):**

  Evaluate secure and scalable alternatives to username/password-based mounts for exporting call recordings to customer cloud storage.

  Current solution uses static credentials, which: Creates security risks, is not enterprise-friendly and Does not align well with compliance standards.
  If the conclusion is that mount-based solutions should be avoided entirely in favor of a more cloud-native approach (e.g., direct SDK-based uploads), that is a valid and acceptable outcome.

  Documentation Link (Internal)

  Documentation Link (Internal)

- **EN-365 || Per-Tenant Configurable Retention for VoiceLog & Report Archiver:**

This release introduces tenant-level retention configuration for VoiceLog Archiver (VLA) and Report Archiver.

Key Points:

- Tenant-level configuration overrides system defaults.
- Minimum retention: 3 months.
- Cleanup job runs daily at midnight.
- If no tenant config exists, system behaves exactly as before.
- No changes to cleanup logic, tagging logic, or audit/history behavior.

This enhancement improves multi-tenant isolation and compliance flexibility without impacting existing behavior.

Documentation Link (Internal)

- **EN-115 || Make Exotel Logos Consistent across Screens:**

The Exotel logo has been updated to ensure a consistent and unified brand experience across all platforms, personas, and user touchpoints. This change replaces any previous

versions of the logo wherever applicable.

Notes

- This is a UI/branding consistency update only.
- No functional changes are introduced as part of this update.

- **EN-768 || Implementation of Help Center icon on the ECC CCaaS solution (4x & 6x):**

Users can now access and interact with the Help Center documentation directly within the CCaaS UI. A Help Center icon is added across supported platforms, enabling contextual access to documentation via an embedded resource center powered by Amplitude. When Amplitude is configured and enabled, clicking the Help Center icon opens the documentation portal within the application interface. The resource_center_icon_clicked event is triggered and tracked in Amplitude. This enhancement is expected to reduce user drop-offs and minimize documentation-related support tickets by providing quick, in-product guidance.

- **EN-258 || AMCC support in 4.x:**

Enabling agents to monitor VoiceBot interactions effectively, starting from an adaptive login and role-selection flow to an intentional transition into active monitoring. It introduces a unified Agent Workbench where monitoring agents can view prioritized VoiceBot conversations, receive critical preparatory alerts, and act with full context. Real-time SOP-driven metrics and a detailed interaction view empower agents to analyze live bot conversations and intervene when required. Seamless takeover ensures a smooth, invisible handoff from bot to human during high-risk scenarios. Together, these capabilities create a proactive, scalable VoiceBot monitoring experience that blends automation with timely human intervention.

Note: This will be delivered with a limited scope. For more details, please refer to the card **EN-258 (internal)**

Security Fixes

- **EN-675 ||4x Source code scan Medium and Low severity fixes**

All encryption changes (Voicelog, Attachment, Custom Fields) maintain backward compatibility. Systems with mixed legacy and new encrypted data will continue to function without disruption.

Customer Reported and Legacy Bugs Fix

System Common Bugs

- **EN-881 || Contact Center Inbound Call Routing- Automatic Call Routing Profile & Policy creation for Administrator:**

Implemented enhancement to ensure that default routing profiles and routing policy entries are automatically created at the Contact Center (CC) level via MultiCC Manager during new CC creation.

Upon creating a new CC:

- Entries are auto-created in cc_routing_profile and cc_routing_policy tables.
- Default routing configurations are visible under the Call Routing tab in Admin UI (after campaign creation).

- **SL-17976 || SMS Notification after call disposition:**

Resolved an issue where multipart HTTP requests (e.g., Exotel SMS) were using the default client encoding (ISO-8859-1), causing special UTF-8 characters such as em-dash (–) and curly quotes (’ “) to be replaced with ?, leading to incorrect SMS content or failures.Encoding is now configurable, and HTTP Node resolves charset in the following order:

1. Script variable httpMultipartCharset
2. Server preference http.node.multipart.charset (system/campaign hierarchy supported)
3. Default behavior (unchanged if not configured)

- **EN-680 || Introduce flags for allowing special characters in userId/username:**

Introduced two new configurable server preference flags at Contact Center (CC) level to control allowed special characters in userId and username using regex validation:

- allowed_userId_regex (default: ^[a-zA-Z0-9-_.@]+$)
- allowed_username_regex (default: ^[a-zA-Z0-9-_.'@]+$)

These flags are configurable in server_preference_store with:

- context_type = 'contactCenter'
- context_id = <ccId>

The system now validates user creation and modification based on the configured regex:

- User creation via UI – Working as expected
- User creation via Bulk Upload – Working as expected
- userId remains non-editable after creation
- username modification follows configured regex rules
- Only allowed characters are accepted; additional special characters are rejected as per configuration

- **EN-692 || SIP Entity Ordering**

Updated SIP configuration handling to ensure correct ordering between statically configured and dynamically generated SIP entities in sip.conf. Static SIP entities (e.g., Inbound Calling, Outbound Calling) are now always placed above dynamically generated entities (e.g., WebRTC, Kamailio, Central Registrar). Since the topmost entity handles inbound calls, this ordering ensures static SIP entities take precedence over dynamic ones. Dynamic SIP entities (e.g., webrtc_<userid>) are automatically added below static entries at server startup and user creation, and removed appropriately upon user deletion. Call context-based SIP entities are added above dynamic entries as expected.

- **EN-1542 || 4x || File Descriptor fix:**

An issue was identified in the 4x App Server where file descriptors were not properly released while accessing configuration files (server.props, jwtProperties, and jwtcertificates). As a result, enabling the 4x → 6x Harmony Mode configuration could lead to a gradual increase in

open file descriptors (FDs), potentially impacting application stability over time. The issue has been resolved by ensuring all file streams are properly closed after use, preventing further file descriptor leaks.

- **SL-18128 || (DCA20260218747042) get-userDetails-by-userName API is failing - receiving 2 CRM URLs on Dev**

During transfer-to-user, the transfer target agent (User2) receives 2 CRM URLs - first with User1's (original agent) session/auth credentials, then with User2's correct credentials. The external CRM loads the first stale URL. get-userDetails-by-userName API is failing - receiving 2 CRM URLs on Dev. The issue has been resolved in the latest Appserver Build.

Current Behavior After Fix:

Case 1

: When User A transfers a call to User B, only one CRM push is sent. In that push, User B's Session ID, User ID, and UserCRT Object ID are reflected.

Case 2:

When User A confers a call with User B, only one CRM push is sent. In that push, both User A's and User B's Session ID, User ID, and UserCRT Object ID are reflected.

Case 3:

When User A confers a call with User B, only one CRM push is sent. In that push, both User A's and User B's Session ID, User ID, and UserCRT Object ID are reflected. When the call ownership is subsequently transferred to User B, a new CRM push is sent. In that push, only User B's Session ID, User ID, and UserCRT Object ID are reflected.

Voice

NA

Toolbar

- **EN-1381 || Callback Scheduled for Masked Number from Toolbar**

Closed the issue after identifying that callback disposition was failing when toolbar masking was enabled and shouldAllowAlphabetsInPhone was set to false. Since client-side masking introduces alphabets in the phone field, validation during dispose-call/callback scheduling fails if the flag is false. To support masked numbers correctly, shouldAllowAlphabetsInPhone must be set to true when masking is enabled. After updating the configuration, callback disposition and scheduling are working as expected.

Video CC

- **EN-456 || Spike: Video CC – Twilio Room Type Compatibility Change**

Identified a breaking change in Twilio where newly created accounts no longer support the legacy group-small Room Type, resulting in runtime failure during video room creation with Error Code 53126. This impacts new Video CC onboarding and tenant migrations to fresh Twilio accounts, as the current implementation relies on the deprecated room type

UI/UX Bugs

- **SL-17910 (SL-18009) || (DCA20260102727576) Unable to change extension getting error can't be modified**

Fixed a UI issue where the autoProvisioningForAllUsers configuration was not handled correctly, causing an incorrect WebRTC flow execution and triggering the Change Extension API with a null CRT object ID. The UI logic has been corrected to ensure that the Change Extension API is invoked only when a valid CRT object ID is present (WebRTC extension or configured call-context-based extension). The extension selection and post-login extension change flows now work correctly across all configurations, including auto provisioning enabled/disabled and WebRTC disabled scenarios.

- **SL-17903 || DCA20251229725766 || stars *** showing in Phone1 field**

Resolved an issue where agents could copy-paste values containing special characters (e.g., ****12345) into the Alternate Number field during Callback disposition, and the call would be disposed successfully with invalid data saved. Now, proper validation is enforced on the Alternate Number field (including copy-paste cases), and the system prevents call disposal if special characters are present.

- **SL-17911 || DCA20260102727586 || Unable to preview the customer information:**

Fixed an issue where the View Customer flow was failing after campaign switch because the UI was sending campaignId = -1, resulting in a *"voice campaign not selected"* error. The issue occurred as the Agent Dialer was not refreshing after a successful campaign switch, causing the old campaign data to be used in the flow. Now, the Agent Dialer refreshes immediately after campaign switch, ensuring the correct campaignId is passed to the API. The fix applies to both Agent and Supervisor (Workbench) flows, and the View Customer functionality works correctly across scenarios.

- **EN-906 || Restrict Default IVR for Transfer for agent in voice toolbar:**

In the release build, the enhancement restricts the "Default" IVR option in the Toolbar transfer dropdown based on the campaign-level flag addDefaultIvrFeatureContextsForCampaign (hidden when false), applicable only to Inbound campaigns.

- Applicable only for Inbound campaigns.
- Not applicable for Outbound campaigns.

- **EN-1276 || Mask Privilege Naming Not Aligned with Omni Campaign Terminology, Causing Confusion:**

Delivered comprehensive Mask Privilege management UI across both 4x and 6x environments.

System Privileges:

- Transfer Interaction
- Confer Interaction
- End Interaction Allowed
- View Disposition of an Interaction
- Set Autocall Status
- Modify Campaign
- Tabs Visibility Controls

Campaign Privileges:

- Manual Interaction

- Transfer Interaction
- Confer Interaction
- View Disposition of an Interaction
- Listen to Campaign Voice Logs
- View Cancel Preview

Browser and Platform Compatibility

Chrome Version :Version 145.0.7632.46 (Official Build) (arm64)

Contact Support

For issues or queries, please contact Exotel contact center Support via the support portal or through designated email channels.

22.4.2. Contact Center - Patch Release Notes - Version 4.13.45

Release Details

Release Date: 16th-Jan-2026

Summary

This patch release introduces significant enhancements to system stability, security, and user experience. Key updates include a new framework for critical admin alerts to prevent accidental data loss, configurable IVR visibility for smoother transfers, and native noise suppression for WebRTC calls. Additionally, this release addresses specific UI/UX behaviors regarding search pagination and connection stability during system sleep modes.

Highlights

- **Enhanced Admin Safety:** Implementation of mandatory confirmation alerts for high-impact actions (e.g., deletions).
- **Optimized Call Transfers:** New configuration options to control "Default IVR" visibility during transfers.
- **Audio Quality Improvements:** Introduction of backend-controlled noise suppression for GWT WebRTC.
- **Security Hardening:** Updates to Content Security Policy (CSP) and CIS Benchmark assessments.

Build Versions

Key versions included in this release are:

Component	Build URL
ameyo-server	**ameyo-server-4.13.609.20260115-R_259515-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.99.20260115-R_259495-linux-gtk.x86_64.rpm**

> **Note -** Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle, thus listed in the previous release articles

Features & Enhancements

Control Default IVR Visibility in Call Transfers (/app) (EN-246):

- **Change:** Agents no longer see Default IVR option by default during transfers—prevents wrong selections.
- **New Control:** addDefaultIvrFeatureContextsForCampaign flag in server_preference_store.
- **Default Behavior:**
  - Shows for inbound campaigns unless disabled.
- **Setup Options:**
  - **CC-level:** Affects all campaigns in the Contact Center.
  - **Campaign-level:** Targets specific campaigns only (overrides CC-level).
- **Impact:** Only changes the IVR dropdown list. Transfers and routing unchanged.
- Documentation **Link** (Internal). **Note:** Not Implemented in Toolbar (**Link**)

Mandatory Warnings for Critical Admin Actions (EN-143):

- **New Protection:** All high-impact admin actions now trigger **irreversible-impact warnings** with required confirmation—checked in both UI and backend.
- **Platform-wide Framework:** Reusable alerts + full audit logging for every critical action.
- **Covered Actions:**
  - Process Delete
  - Process Table Definition Modify

    Campaign Delete

    User Delete

    Email Media Profile Delete

Table Definition Delete

    - Routing Rule Delete/Modify/Inactive
    - Routing Policy Delete
- No accidental deletions—safer admin experience.

Auto Noise Suppression in GWT WebRTC SDK (EN-290):

- **Feature:** Lightweight noise cancellation automatically reduces background noise in calls.
- **How it Works:**
    - Enabled by default via backend flag: disableWebrtcNoiseSuppression (set to false in server_preference_store at Contact Center level).
    - No UI changes or WebRTC issues.
    - Safe fallback if unsupported.
    - Pilot tests confirm cleaner audio.
- Toggle off via flag if needed.

Security Fixes

Fixed CSP Misconfiguration (object-src Vulnerability) (GA-15260):

- **Security Fix (Infosec):** CSP header updated post-patch upgrade.
- **Resolution:**
    - Changed object-src 'self' to object-src 'none'—no active vulnerabilities remain.
    - Scan "issues" are now just informational recommendations (optional hardening).
    - Validated compliant via standard CSP tools.
- Secure configuration confirmed and resolved.
- Documentation **Link** (Internal)

CIS Hardening for 4x base OS (GA-133):

- A CIS Benchmark compliance assessment was conducted on a Rocky Linux 8 system deployed using a minimal OS image. The objective of this assessment was to establish a baseline compliance status prior to full CIS hardening and remediation.
- Benchmark comparison was performed against previously validated environments:

    - **CIMB Setup:** rocky_cis_report_CIMB.html
    - **Porter Setup:** porter_cis_report.html
- The identified non-compliant controls are documented and tracked in the **CIS-Benchmark sheet – Rocky8**, which serves as the official remediation tracking artifact. All findings are under review, and remediation actions are planned to align the system with CIS benchmark requirements.

Bug Fixes

System Common Bugs

- **NA**

Voice

- **NA**

Toolbar

- **NA**

Fusion(IC, Chat, Social Media)

- **NA**

VLA

- **NA**

Monitoring Data and Reports

- **NA**

Video CC

- **NA**

Mobile Apps

- **NA**

SI Apps

- **NA**

Media

- **NA**

UI/UX Bugs

Fixed Call ID Search Across All Pages (SL-17831):

- **Issue:** When supervisors searched call records using a Call ID, the results were shown correctly on the first page. However, when moving to the next page, some matching records were missing.
- **Fix:** The search value is now correctly passed for all pages. Supervisors can now see all matching call records across pages when searching by Call ID.
- Supervisors see complete results—no more missing calls on later pages.

Fixed Auto Preview Dial After Agent Break (DCA20260105728410) (SL-17915):

- **Issue:** An issue was observed in Auto Preview Dial where, after completing a call and moving the agent to Break, the next call attempt could fail when the agent became Available again and clicked the Call button. This happened due to a temporary mismatch in the UI, which caused the system to attempt dialing an incorrect number for the previewed customer.
- **Fix:** The UI handling has been improved to ensure the correct previewed customer details are always used when initiating a call.
- This ensures a smooth and reliable calling experience when agents move between Available and Break states during Auto Preview Dial.

Fixed Sleep Mode State Glitch (DCA20251112704300) (SL-17751) :

- **Issue:** In certain scenarios, when a user's system enters sleep mode (commonly on Windows), the network may be temporarily suspended by the operating system. This can cause the real-time push connection to break while the application is still open.
- **Fix:** To maintain session stability and prevent inconsistent application states, the system includes enhanced handling for such scenarios.
- Wake from sleep → back to normal operations instantly.

Browser and Platform Compatibility

Chrome Version : Version 143.0.7499.170 (Official Build) (arm64)

Contact Support

For issues or queries, please contact Exotel contact center Support via the support portal or through designated email channels.

22.4.3. Contact Center - Patch Release Notes - Version 4.13.44

Release Details

Release Date: 7th-Jan-2026

This document outlines the feature enhancements, bug fixes, and other updates included in the ECC 4.13.44 patch release.

Summary

This patch release focuses on improving system stability through enhanced version management and security updates. Key improvements include automated version synchronization during upgrades to prevent configuration mismatches and stricter validation during agent login. The release also addresses critical bugs in Voice operations, Supervisor monitoring, and User Interface performance to ensure a smoother customer experience.

Build Versions

Key versions included in this release are:

Component	Build URL
ameyo-server	**ameyo-server-4.13.608.20260102-R_255329.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.98.20260102-R_255296.x86_64.rpm**

> **Note -** Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle, thus listed in the previous release articles

Features Enhancement

Automatic Version Updates During Appserver RPM Install/Upgrade (GA-128):

- In this release, the app automatically writes and updates the correct version number (build tag) across key areas—like backend config files, UI toolbar, and database—whenever you install or upgrade the Appserver RPM.
- **Key improvements:**
    - No more manual version updates needed.
    - Prevents outdated ("stale") version info after upgrades.
    - Ensures consistent version display everywhere for better tracking and reliability.

  The script that loads INI settings into the database now checks for an existing release.version key and updates it with the new build tag during install/upgrade. This makes post-upgrade access smoother and more dependable.
- Documentation **Link** (Internal)

Server-Side Version Check in Login API (GA-130):

- This release adds backend validation in the Login API to catch client-server version mismatches.
- **How it works:**
    - Server reads its version from config files (version.props and DACXAmeyoProServerDefault.ini).
    - Compares it to the client's version (sent in the login request).
    - **Versions match?** Login continues normally.
    - **Versions mismatch?** Returns a specific error code so the client can detect the issue and respond (e.g., prompt reload or upgrade).
- This prevents login problems from version gaps and ensures smooth compatibility handling.

Client Version Sent in Login API Request (GA-129):

- This release updates the login API to include the client's version info in every request.
- **Key changes:**
    - Client sends its version during login.
    - Server detects mismatches and returns a specific error code to the frontend.

    - Frontend can then clearly notify users (e.g., "Please upgrade to continue").
- This makes version incompatibilities obvious and guides users to upgrade smoothly before logging in.

Security Fixes

- **Fixed Private IP Exposure in API Response (GA-17):**
    - **Issue:** The getAllUserCCPresence API was accidentally exposing private IP addresses in responses (flagged during existing customer setup assessment).
    - **Fix:** Resolved in the latest build. Private IPs are no longer disclosed, improving security and compliance.
    - This change protects sensitive network details without impacting API functionality.

Bug Fixes

System Common Bugs

Fixed Source Phone in Call History for Failed Customer Legs (GA-98):

- **Issue:** For calls with ATTEMPT_FAILED disposition (customer not dialed), the call history always showed NODID in src_phone, ignoring the configured DID Call Context overwrite.
- **Fix:** Now correctly uses the DID Pool from Campaign Call Context settings.
    - If a Call ID Pool is set in the UI, it dumps the **first DID** from the comma-separated list in src_phone for attempt-failed calls.
- This ensures accurate call history logging even when customer legs fail.

Live Monitoring Now Updates After Tab Switch (DCA20251112704012) (SL-17749):

- **Issue:** Agent duration in Supervisor live monitoring froze when switching from Workbench back to Monitor tab.
- **Fix:** The data refresh timer now restarts properly, keeping live monitoring data (like agent durations) updating at regular intervals.
- No more stalled views—real-time data flows seamlessly.

Fixed PostgreSQL Connection Leak Causing Zabbix Alerts (DCA20251209716962) (SL-17833):

- **Issue:** Zabbix "Transaction limit breached" alerts from PostgreSQL max connections (1500) exceeded due to JDBC leak in VoicelogArchiverUIService.
- **Fix:** Leak resolved in latest art release build.
- Stable DB performance—no more overload alerts.

Fixed Call Context Routing for Non-Root Contact Centers (CLONE - DCA20230613265456) (GA-97):

- **Issue:** Admins from Contact Centers (CC) other than ccId 1 creating call contexts for inbound campaigns saw calls wrongly routed to CC 1, causing failures.
- **Fix:** Call context routing now correctly sends calls to the CC where the admin created the context.
- Verified working in the latest build—proper routing restored.

Voice

Fixed Number Masking After Conference Call Leg Ends (SL-17874):

- **Issue:** In conference calls, masked numbers showed correctly during the active call. But after the first leg disconnected (call went to Queued state), the agent toolbar revealed the actual phone number instead of staying masked.
- **Fix:** Masking now persists correctly through state changes. Fixed in latest release build.
- Agents see consistent masking—no more unmasking surprises.

Enhanced callHungupStatus Event for Re-ACD Scenarios (DCA20251119707255) (SL-17773):

- **Update:** The callHungupStatus global event now includes lastStatus—the call's state right before hangup (e.g., ringing or connected).
- **Benefit:** Helps distinguish hangups during ringing vs. post-connection, improving re-ACD handling on your end.

- Behavior is by design; SDK enhancement validated in latest build.

Fixed Preview Dialer Auto-Connecting Before Timeout (DCA20251107702396) (SL-17734):

- **Issue:** In preview dialing, calls sometimes auto-connected early—before their countdown timer finished—if a prior call was canceled mid-countdown.
- **Fix:** Added proper active call validation. Now, each call waits for its full timeout before dialing.
- Reliable preview dialing, no more random early connections.

Toolbar

Fixed Number Masking Bypass in Browser Dev Tools (DCA20251205715552) (SL-17823):

- **Issue:** With number masking enabled, phone numbers were sometimes still visible in browser developer console logs or page elements.
- **Fix:** Client-side masking strengthened—numbers now stay fully hidden in logs and elements when enabled.
- Better protection against accidental exposure via dev tools.

Fusion(IC, Chat, Social Media)

Chat Campaign Stats Fixed on Supervisor Dashboard (SL-17853):

- **Issue:** Supervisor dashboard showed blank chat campaign stats.
- **Resolution:** Fixed after App Server restart. Not reproducible since.
  - Debug logs added for monitoring.
  - Under observation in latest App Server build.
- Stats now display reliably.

VLA

Fixed VLA UI Slowdown with Large Lead Volumes (DCA20250915681830) (SL-17568):

- **Issue:** Voice Log Archiver (VLA) UI lagged or stuck when loading with very large lead datasets, due to heavy client-side processing of massive responses.
- **Fix:** Optimized for high-volume scenarios. Sanity tested in latest ART build:
    - VLA UI loads smoothly
    - Tab switching works
    - Search modal opens fast
- Better performance under heavy load.

UI/UX Bugs

Blocked Disposition Bypass via Keyboard/Mouse (DCA20251124710457) (SL-17791):

- **Issue:** Agents could select dispositions (using Enter key or clicking dropdown) even when campaign settings restricted it post-call.
- **Fix:** Pointer events fully blocked on disabled Disposition Class dropdown—stops both mouse and keyboard workarounds.
- Campaign disposition rules now enforced consistently.

Browser and Platform Compatibility

Chrome Version : Version 143.0.7499.110 (Official Build) (arm64)

Contact Support

For issues or queries, please contact Exotel contact center Support via the support portal or through designated email channels.

22.4.4. Contact Center - Patch Release Notes - Version 4.13.43

Release Details

Release Date: 18th-December-2025

This document outlines the feature enhancements, bug fixes, and other updates included in the ECC 4.13.43 patch release.

Highlights/Summary

This release introduces enhancements to the toolbar for smoother upgrades, specifically handling auto-cache invalidation. It also includes critical bug fixes related to CTI popup data masking and application server stability.

- **Seamless Upgrade Experience:** The toolbar now automatically handles cache invalidation during build upgrades, reducing login failures and UI inconsistencies.
- **Enhanced Data Privacy Logic:** corrected logic regarding phone number masking in CTI popups to strictly adhere to system configurations.
- **System Stability:** Resolved initialization issues regarding App Server startups following database patches.

Build Versions

The following table lists the updated component versions for this release.

Component	Build URL
ameyo-server	**ameyo-server-4.13.608.20251218-R_250920-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.97.20251215-R_249368-linux-gtk.x86_64.rpm**

> **Note -** Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle, thus listed in the previous release articles

Feature Enhancements

- **Handle auto cache invalidation for 4x build upgrades - Toolbar (GA-33) (GA-34):**

We've upgraded the toolbar to automatically handle browser cache during 4x build upgrades, ensuring smooth logins and reliable access.

Key improvements:

- **Auto-cache cleanup**: When an agent is not logged in, non-essential cookies and storage from older builds are cleared—while preserving critical authentication, SSO, and CRM data.
- **Login page refresh**: The system auto-refreshes the login page to load the latest version; if already open during upgrade, agents see a prompt to reload.
- **No manual intervention**: Agents log in normally without refreshing manually, preventing login failures, UI inconsistencies, runtime errors, and stale data issues.

User Impact

- Smoother, hassle-free upgrades with reliable logins.
- No disruptions or manual steps required.

Document Link (Internal)

Technical Tasks

There were no technical tasks performed in this release.

Bug Fixes

System Common

- **is_maskable patch handling in new and existing customers (GA-36):**
    - **Issue:** Phone-related fields (such as phone1, phone2) were being masked unintentionally in CTI popups when addCustomerInfoToCRMUrl was enabled, even when data masking was not configured in the setup.

- **Fix:** The logic has been updated to ensure that phone fields are masked only when masking is explicitly enabled in the setup.
- **Impact:** This prevents unintended encryption of phone data and ensures consistent behavior across CTI popups and CRM integrations.

- **App Server Startup Stability (SL-17865):**
  - **Issue:** An issue was reported where the App Server failed to start after applying a new database patch.
  - **Fix:** Necessary changes were implemented to ensure compatibility with the updated database patch, resolving server initialization failures.

Limitations and Known Issues

- No new limitations or known issues have been reported for this specific release.

Browser and Platform Compatibility

- **Chrome Version : Version 142.0.7444.176 (Official Build) (arm64)**

Contact Support

For issues or queries, please contact Exotel contact center Support via the support portal or through designated email channels.

22.4.5. Contact Center - Patch Release Notes - Version 4.13.42

Release Details

Release Date: 27th-November-2025

This document outlines the feature enhancements, bug fixes, and other updates included in the ECC 4.13.42 patch release.

Highlights/Summary

This release focuses on improving platform stability and data accuracy. Key updates include fixes for SLA calculation discrepancies in reporting, connectivity status indicators in the agent toolbar, and supervisor monitoring controls.

These enhancements ensure more reliable operations for agents and supervisors

Build Versions

Key versions included in this release are:

Component	Build URL
ameyo-server	**ameyo-server-4.13.605.20251121-R_242645-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.96.20251121-R_242502-linux-gtk.x86_64.rpm**

> **Note -** Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle, thus listed in the previous release articles

Features Enhancement

- This maintenance release is dedicated to system fixes and stability improvements.

Bug Fixes

Voice and Reports

- **Incorrect Stats SLA Calculation (SL-17594)(GA-12):** Fixed a discrepancy between the Stats API and Reports where calls served within SLA were calculated incorrectly. The system previously reverted to a default SLA value (20 seconds) due to a mapping issue; it now correctly references the campaign's configured SLA (e.g., 240 seconds).
- **DTLS Exchange is going in pending state (SL-17360):** Addressed an issue where the agent toolbar displayed the DTLS exchange as "pending" even after the connection was successfully established. The toolbar now accurately reflects the connected state.

UI/UX and Monitoring

- **Snoop option Enable/disable_Issue (SL-17699):** Resolved an issue where monitoring action buttons (Snoop, Barge, Confer) would occasionally become disabled, and active snoop sessions could not be stopped. This was caused by incorrect updates to call activity status, which has now been rectified.

Known Issues

- No new limitations or known issues were identified in this release.

Compatibility

- **Browser:** Chrome Version 142.0.7444.176 (Official Build) (arm64)

Contact Support

For issues or queries, please contact Exotel contact center Support via the support portal or through designated email channels.

22.4.6. Contact Center - Patch Release Notes - Version 4.13.41

Release Details

Release Date: 11th-November-2025

This document outlines the feature enhancements, bug fixes, and other updates included in the ECC 4.13.41 patch release.

Highlights

- **Kafka Data Publishing:** Call History and User Disposition History can now be published directly to a Kafka topic for real-time data processing by external applications.
- **Toolbar Inactivity Logout:** Fixed an issue where agents using the toolbar in an erroneous state were not being logged out due to inactivity.
- **Click-to-Dial Fix:** Resolved a problem where click-to-dial calls from a CRM integration would intermittently fail due to an incorrect server URL

Build Versions

Key versions included in this release are:

Component	Build URL
ameyo-server	**ameyo-server-4.13.603.20251111-R_239141-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.96.20251111-R_239057-linux-gtk.x86_64.rpm**

> **Note - Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle, thus listed in the previous release articles.**

Features Enhancement

- **Publish call history and user disposition history to kafka [EN-1]:** The system now supports publishing processed Call History and User Disposition History data to a Kafka topic, in addition to storing it in the database. This integration enables external applications to receive and process call-related data in real time, ensuring smoother operations in 4.x setups.

  Key Benefits:

  - Real-time data availability for external systems.
  - No impact on existing call history or disposition data storage.
  - Controlled by a configuration flag for easy enable/disable of Kafka publishing.
  - Fully backward compatible with previous versions.

Tech Tasks

NA

Security Fixes

NA

Debugging Docs / SOPs

- **Unable to play call recordings from the Supervisor interface [SL-17675]:**

To aid in debugging this issue, additional logging has been introduced. Update the `logging_server.properties` file to include the following entries:

log4j.logger.ameyo.rest=FINE, logfile, fatallogfile

log4j.additivity.ameyo.rest=false

Customer Reported and Legacy Bug Fixes

System Common Bugs

- No updates for this section.

Voice

- **Callback initiation handling for 4.x [EN-2]:** Added support to trigger callback nodeflow even when no agent is available, using a new contact center–level flag in `server_preference_store`. This enhancement applies to both campaign and self-callbacks. If no agent answers the call after nodeflow execution, it is now marked as a failed attempt with appropriate log comments.

Toolbar

- **Agent not logged out due to inactivity when status is erroneous [EN-148655]:** Previously, agents remained logged in while inactive when their status became erroneous. The system now automatically logs out such agents after the inactivity timeout, ensuring consistency between the main app and the toolbar.
    - Document **Link** (Internal)

- **Auto Call option not working [SL-17706]:** Fixed an issue where click-to-dial calls from the customer's CRM were not being initiated due to the integration script (`ameyo-integration-v4_13.js`) using an incorrect base URL. The fix ensures the correct base URL is consistently used, restoring stable click-to-dial functionality.
-
- **Freshdesk Toolbar App [GA-15255]:** Removed debugger code from the Freshdesk app that previously caused execution pauses during troubleshooting. The update improves app performance. With this update, debugging and issue analysis will now be smoother and faster.

Limitations and Known Issues

No new limitations or known issues were reported in this release.

Browser Version

Testing was performed using **Chrome Version 141.0.7390.123** (Official Build) (arm64)

Contact Support

For issues or queries, please contact Exotel contact center Support via the support portal or through designated email channels.

22.4.7. Contact Center - Patch Release Notes - Version 4.13.40

Release Details

Release Date: 28th-October-2025

This document outlines the feature enhancements, bug fixes, and other updates included in the ECC 4.13.40 patch release.

Highlights / Summary

This build includes multiple platform-wide enhancements, bug fixes, and performance improvements across Voice, Toolbar, Fusion, and Reporting modules.

- Enhanced API-level validations and compliance with VAPT recommendations
- Stability improvements for HA, DR, and WebRTC Single Session environments.
- Rule Engine and Reports updates for better data accuracy.
- New configuration flags enabling improved administrative control and system tuning.

Build Versions

Component	Build URL
ameyo-server	**ameyo-server-4.13.601.20251028-R_235299-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.94.20251027-R_234974-linux-gtk.x86_64.rpm**

Note - Release details provided in the above table has the change only, other releases has no change and are same delivered in last patch cycle

Feature Enhancements

- **Diarization Support in 4.x to Enable Agent Assist (EN-141554):** This enhancement introduces real-time, AI-powered assistance for contact center agents during live customer interactions. The feature enables contextual insights and intelligent recommendations, helping agents respond more effectively and improving service quality as well as overall operational efficiency.
    - As part of this upgrade, support has been added for passing **custom headers** when creating a Spy Node within the call management layer. A Proof of Concept (POC) validated the Spy Node's capability to silently create a call leg with ASAP (Gen-AI assistance module) for real-time monitoring and contextual guidance.

Inbound/Outbound Channel Handling Improvements:

- A Spy Node has been introduced at the Call Management level to monitor both agent and customer call legs.
- Asterisk's ChanSpy application is used with the "o" argument to listen to the agent's outbound call channel.
- The Spy Node successfully supports silent call leg creation for future integration with ASAP, ensuring non-intrusive AI monitoring during live call sessions.

- **Custom Regex Support in Input Form Validations for FusionCX Chat Web Form (EN-147747):** In the current FusionCX pre-chat form, input fields such as Name, Email, and Phone Number relied on fixed validation logic, limiting flexibility for administrators who required organization-specific validation rules.
- This enhancement introduces **Custom Regex (Regular Expression) Support** for input field validations in the FusionCX Chat Web Form. Business administrators can now define and apply their own regex patterns to any input field—Name, Email, or Phone Number—directly through configuration.
- As part of this update, specific regex enforcement for the Name field has been implemented, ensuring that user inputs conform to the prescribed validation rules before a chat session begins.

- **Unified Branding and Theme Standardization Across SKUs (EN-147776):** Previously, each SKU within the product suite used distinct color themes, resulting in inconsistent

branding and a fragmented user experience. Customers engaging with multiple SKUs experienced them as separate products rather than components of a unified suite.

- A core color palette has been defined for standardization across all relevant interfaces:
  - Primary Blue: #394FB6
  - Primary Hover Color: #31439B
- The new theme is applied across all Agent, Supervisor, and Admin personas for both 4x and 6x platforms.
- This change ensures consistent visual identity and strengthens brand recognition across the ECC ecosystem.

- **Inactivity-Based Auto Logout for 4x and 6x Toolbar Integrations (Including Omni) (EN-146986):** Previously, the Toolbar did not support automatic logout based on agent inactivity. This caused discrepancies in login duration reports and unnecessary license utilization when agents left sessions idle.
- This enhancement introduces **inactivity-based auto-logout** for toolbar integrations, enabling the parent CRM application to manage session termination based on user-defined inactivity thresholds.
- The Toolbar–CRM integration framework has been extended to support this capability, and the generic integration documentation has been updated accordingly.

Bug Fixes

- **Handling Call Disconnect Events to Trigger ACW Timer via CRM (SL-17591):** An issue was identified where the callHungupStatus global event was being subscribed to multiple times during a call session, leading to duplicate event triggers upon call termination. This caused inconsistencies in post-call (After Call Work) timer initiation within the CRM.

  Fix Implemented:
  The event subscription logic has been updated to ensure that only a single callHungupStatus event is triggered per call session. Validations confirm that the *All Results* section in the Debugger App now displays exactly one event per call.

Recommended Practice:

- Subscribe to the callHungupStatus event only once per session.
- After each call, clear the *All Results* section in the Debugger App to accurately view events related to the current session.

Security and Performance Updates

- No specific security updates noted in this patch version itself.

Voice

Incorrect Customer Talk Time in Call History Report (SL-17587): An issue was identified where the **customer talk time** recorded in the Call History Report appeared higher than the actual talk duration, while the corresponding UDH displayed a value of 0. This discrepancy was also observed in single ACD inbound calls, where the reported customer talk time exceeded the agent talk time due to the inclusion of **ring time** in the talk duration calculation.

The latest build corrects this behavior. The Call History Report now accurately represents customer talk time, excluding any ring duration.

CRM Panel Not Opening During Conference Calls (GA-15398): During conference scenarios initiated by supervisors, the CRM panel failed to load on the conferred user's interface. The issue originated because the CRM app initialization function, responsible for fetching and rendering the CRM view, was not triggered in the conferred user screen flow.

This has been resolved by updating the logic to ensure consistent invocation of the CRM initialization function across all user flows. The CRM panel now loads reliably for both **supervisors and agents** during conference calls.

Fusion (IC, Chat, Social Media)

- No specific Fusion update noted in this patch version itself.

Monitoring Data and Reports

- No specific update in Monitoring data and reports in this patch version

UI/UX Bugs

- **UI Freeze While Accessing Lead Configuration (SL-17604):** An issue was identified where the **View Configuration** modal caused the UI to hang, preventing users from performing any actions when opened. This behavior rendered the interface unresponsive during lead configuration checks or edits.
- The issue has been fixed, and users can now open and interact with the **View Configuration** modal without any UI freeze or performance degradation.
    - **Note:**This fix addresses the specific UI hang scenario. However, system responsiveness may still be affected if operations exceed the configured Fair Usage Policy (FUP) limits.

Debugging Docs / SOPs

No specific update in this section for this patch release version

Limitations / Known Issues

- No new limitations identified in this patch.

Browser and Platform Compatibility

- **Supported Browsers:** Chrome Version 141.0.7390.123 (Official Build) (arm64)
- **Mobile Apps:** No updates in this patch.

Contact Support

For issues or queries, please contact Exotel contact center Support via the support portal or through designated email channels.

22.4.8. Contact Center - Patch Release Notes - Version 4.13.39

Release Details

Release Date: 16th-October-2025

This document outlines the feature enhancements, bug fixes, and other updates included in the ECC 4.13.39 patch release.

Highlights

- **Kafka Data Publishing:** Call History and User Disposition History can now be published directly to a Kafka topic for real-time data processing by external applications.
- **Toolbar Inactivity Logout:** Fixed an issue where agents using the toolbar in an erroneous state were not being logged out due to inactivity.
- **Click-to-Dial Fix:** Resolved a problem where click-to-dial calls from a CRM integration would intermittently fail due to an incorrect server URL

Build Versions

Key versions included in this release are:

Component	Build URL
ameyo-server	**ameyo-server-4.13.603.20251111-R_239141-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.96.20251111-R_239057-linux-gtk.x86_64.rpm**

> **Note -** Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle, thus listed in the previous release articles.

Features Enhancement

- **Publish call history and user disposition history to kafka [EN-1]:** The system now supports publishing processed Call History and User Disposition History data to a Kafka topic, in addition to storing it in the database. This integration enables external applications to receive and process call-related data in real time, ensuring smoother operations in 4.x setups.

  Key Benefits:

  - Real-time data availability for external systems.
  - No impact on existing call history or disposition data storage.
  - Controlled by a configuration flag for easy enable/disable of Kafka publishing.
  - Fully backward compatible with previous versions.

Tech Tasks

NA

Security Fixes

NA

Debugging Docs / SOPs

- **Unable to play call recordings from the Supervisor interface [SL-17675]:** To aid in debugging this issue, additional logging has been introduced. Update the `logging_server.properties` file to include the following entries:
  log4j.logger.ameyo.rest=FINE, logfile, fatallogfile
  log4j.additivity.ameyo.rest=false

Customer Reported and Legacy Bug Fixes

System Common Bugs

- No updates for this section.

Voice

- **Callback initiation handling for 4.x [EN-2]:** Added support to trigger callback nodeflow even when no agent is available, using a new contact center–level flag in `server_preference_store`. This enhancement applies to both campaign and self-callbacks. If no agent answers the call after nodeflow execution, it is now marked as a failed attempt with appropriate log comments.

Toolbar

- **Agent not logged out due to inactivity when status is erroneous [EN-148655]:** Previously, agents remained logged in while inactive when their status became erroneous. The system now automatically logs out such agents after the inactivity timeout, ensuring consistency between the main app and the toolbar.
- **Document Link (Internal)**

- **Auto Call option not working [SL-17706]:** Fixed an issue where click-to-dial calls from the customer's CRM were not being initiated due to the integration script (`ameyo-integration-v4_13.js`) using an incorrect base URL. The fix ensures the correct base URL is consistently used, restoring stable click-to-dial functionality.

- **Freshdesk Toolbar App [GA-15255]:** Removed debugger code from the Freshdesk app that previously caused execution pauses during troubleshooting. The update improves app performance. With this update, debugging and issue analysis will now be smoother and faster.

Limitations and Known Issues

No new limitations or known issues were reported in this release.

Browser Version

Testing was performed using **Chrome Version 141.0.7390.123** (Official Build) (arm64)

Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels.

22.4.9. Contact Center - Patch Release Notes - Version 4.13.38

Release Details

Release Date: 30th-September-2025

Short description: This patch introduces features for unmasked voicelog filenames (VLA), real-time agent counts during toolbar transfers, security updates for PHP/Apache versions in AMF, and fixes for reporting and interaction handling.

Highlights / Summary

- **Unmasked Voicelog Filenames (VLA):** Added capability (via backend config) to store unmasked numbers in VLA recording filenames while maintaining masked names for UI downloads.
- **Toolbar Transfer Agent Counts:** Toolbar "Transfer to Queue/Campaign" dropdowns now display real-time available/on-call agent counts.
- **AMF Security Update:** Updated PHP (to 8.2.28) and Apache versions within the AMF component to address vulnerabilities.
- **Bug Fixes:** Resolved issues with custom field handling causing report failures, click-to-dial during wrap-up, `.msg` attachment handling, and chat report parameters.

Build Versions

The following table lists the updated component versions for this release.

Component	Build URL
ameyo-server	**ameyo-server-4.13.597.20250925-R_226659-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.93.20250925-R_226675-linux-gtk.x86_64.rpm**
AMF for whatsapp, cogno and Instagram integration	**AMF-100.0.272.20250916-R_54869.x86_64.rpm**

> **Note:** Only components with significant changes are listed. Other releases has no change and are same delivered in last patch cycle

Feature Enhancements

- **Unmasked Number in VLA Voicelog Filenames (EN-144878):** The feature **EN-138876**, initially released in version **4.13.26**, was earlier implemented only in **Call Manager** due to bandwidth and customer priority constraints. This update extends the same functionality to the **VLA**, ensuring consistent behavior across both components. This implementation is forward-compatible with future enhancements for configurable filenames.

  The feature introduces a backend configuration at the **contact center level**, enabling recordings stored on the call server to retain the **unmasked customer number (phone1)** in the filename, even when number masking is enabled. This unmasked version remains internal for backend and compliance purposes only.

- **Use Case:** An administrator needs to locate a specific call recording on the server for an internal audit. Instead of searching through masked data, they can directly find the file using the customer's actual phone number, saving significant time. When an agent or supervisor downloads the same recording from the UI, the filename will correctly show the masked number to maintain data privacy.

- **Agent Availability Display During Toolbar Transfers (EN-145691):** Enhanced the **"Transfer to Queue"** and **"Transfer to Campaign"** dropdowns in the Toolbar to display real-time counts of available and on-call agents for each target, similar to the /app interface. Previously, during inbound and outbound call transfers from the Toolbar, the **“Transfer to Queue”** and **“Transfer to Campaign”** dropdowns did not show real-time agent counts. This has been updated: the dropdowns now display the number of agents **available and already in a call** next to each queue or campaign, consistent with the /app interface, helping agents make informed transfer decisions.
- **Use Case:** An agent handling an inbound call needs to transfer the customer to a specialized support queue. Previously, they had no insight into whether any agents were available. Now, the agent can see "Support Queue (2 Available, 3 In Call)" in the dropdown and confidently transfer the call, knowing someone is ready to accept it.

Technical Tasks

There were no technical tasks performed in this release.

Bug Fixes

- **Interaction Report Failure (SL-17454):** Fixed Interaction Detail Reports failing when custom field names contained commas. Added validation to prevent creating/updating custom fields with commas.
- **Click-to-Dial During Wrap-up (GA-15023):** Corrected the error message displayed when agents attempt click-to-dial during wrap-up time; now shows "Please dispose of the current call..." and pops up the toolbar if minimized.
- **.msg Attachment Handling (GA-14101, SL-16072):** Resolved an issue where `.msg` email attachments (typically from Outlook) were missing from created tickets. Now, tickets always contain the correct attachment: From Gmail → the original .msg file is attached.
  From Outlook → the .msg file is captured as a .txt attachment with the file content.

Monitoring Data and Reports

- **Chat Report Parameters (SL-17548):** Restored missing input parameters and options for the Chat Agent Productivity Report UI that disappeared after a previous ART patch update.

Security and Performance Updates

- **AMF Component Security (SL-17523):** Updated the PHP version to 8.2.28 and Apache to 2.4.65 within the AMF component's Docker image to address reported vulnerabilities.

Limitations / Known Issues

- No new limitations identified in this patch.

Browser and Platform Compatibility

- **Supported Browsers:** Chrome Version 140.0.7339.208 (Official Build) (arm64)
- **Mobile Apps:** No updates in this patch.

Contact / Support Information

For issues or queries, please contact Exotel contact center Support via the support portal or designated email channels.

22.4.10. Contact Center - Patch Release Notes - Version 4.13.37

Release Details

Release Date: 4th-September-2025

This document outlines the feature enhancements, bug fixes, and other updates included in the ECC 4.13.37 patch release.

Highlights / Summary

- **2FA Email OTP Fix:** Resolved compatibility issues preventing configuration and use of 2FA via Email OTP on PHP 8.x.
- **DR License Generation:** Fixed hardware license generation failures on DR servers using PostgreSQL with custom ports.
- **HA Stability:** Corrected handling of `APPSERVERUI` service entry in High Availability configurations to prevent AppServer stops.
- **Agent State/UI Fixes:** Addressed issues with rule engine event data, user ID character limits, supervisor campaign assignments, and WebRTC status synchronization.

Build Versions

The following table lists the updated component versions for this release.

Component	Build URL
ameyo-server	**ameyo-server-4.13.596.20250903-R_220368-linux-gtk.x86_64.rpm**
ameyo-djinn	**ameyo-djinn-100.0.413.20250814-R_215753.x86_64.rpm**

> **Note:** Only components with significant changes are listed. Other releases has no change and are same delivered in last patch cycle

Feature Enhancements

- **Unable to Configure Two-Factor Authentication via Email OTP Fix (SL-17350):** The existing package, originally built for PHP 7.4, failed on PHP 8.x environments, preventing the configuration of Two-Factor Authentication (2FA) using Email OTP. The implementation has been updated to support PHP 8.x, ensuring seamless 2FA configuration. The flow now functions end-to-end: OTPs are delivered successfully, SSL validation passes, and the login UI correctly displays the OTP input field.

Tech Tasks

- **DR Drill for Ameyo (SL-17397):** Resolved an issue where hardware license generation failed on Disaster Recovery (DR) servers running PostgreSQL on a custom port. The updated build ensures that the `ameyoctl getHardwareData` command executes successfully and generates the required system signature file as expected.
- **AppServer Service Stopping in HA Mode (SL-17390):** Fixed an issue in High Availability (HA) mode where the *APPSERVERUI* service entry in `serviceConf.csv` was not handled properly. When this entry was manually added or removed during upgrades, it caused the AppServer to stop or behave inconsistently. The latest build ensures stable AppServer operation in HA mode without requiring any manual edits to `serviceConf.csv`

Bugs Fixes

- **Missing Process Information in Context Data (GA-14455):** Resolved an issue where certain events sent to the Rule Engine did not include the Process ID within `jobContext.` This omission caused process-based rules to misfire when a campaign and process were selected during rule configuration. The fix ensures all events now consistently include the Process ID, enabling accurate and reliable rule execution. This issue has been resolved in the latest App Server build.

- **Configurable Database Timeout for Flagged Stats (GA-15240):** Introduced support for configuring the flagged stats database timeout through the `reload properties` API. This enhancement allows administrators to adjust timeout values dynamically

without restarting the application server, reducing downtime and improving operational flexibility.

- **Inclusion of lead_management_history Table in Clean and Drop Function (GA-15239):** In earlier builds, cleanup operations logged errors related to the `lead_management_history` table, which was omitted from the drop-table list. This prevented recreation of the table during maintenance. The table has now been correctly added to the drop function, ensuring clean database resets and error-free reinitialization.

- **WebRTC Single Session Status Not Syncing with Toolbar (SL-17326):** Fixed an issue where, upon login with WebRTC Single Session enabled, the Single Session pop-up correctly showed an active connection (green), but the toolbar WebRTC indicator remained red until a manual reload or duplicate login occurred. The synchronization logic has been corrected. The toolbar now updates its WebRTC status instantly and accurately, without requiring a refresh.

- **Character Length Restriction for userId (GA-14912, SL-17019):** Previously, there was no limit on the character length for the `userId` field during user creation, allowing excessively long values (for example, 15,000 characters). Since the maximum supported GET URL length is 2048 characters, certain API calls (such as delete user) failed when `userId` was too long. A new validation has been added `userId` values longer than 500 characters are now rejected with an appropriate error message to ensure system stability.

- **Supervisor Manage Section Issue with Large Campaign Assignments (GA-14787):** Resolved a problem where supervisors assigned to large numbers of campaigns (for example, 300 or more) encountered errors due to excessively long query strings exceeding the supported URL length. The system now fetches assigned campaigns directly from the backend, eliminating dependency on lengthy request parameters and ensuring smooth page loading for supervisor management.

- **DTLS Exchange Displayed as Pending After Successful Connection (SL-17360):** Agents were intermittently shown as being in a “pending” DTLS exchange state, even though the WebRTC connection had already been established. Network logs (via `chrome://webrtc-internals`) confirmed successful DTLS handshakes, while the toolbar UI failed to reflect the connected state. The fix updates the toolbar logic to display the accurate DTLS connection status, preventing erroneous “pending” indications.

Security and Performance Updates

- No specific security updates noted in this patch version itself.

Limitations / Known Issues

- No new limitations identified in this patch.

Browser and Platform Compatibility

- **Supported Browsers:** Chrome Version 139.0.7258.128 (Official Build) (arm64)
- **Mobile Apps:** No updates in this patch.

Contact / Support Information

For issues or queries, please contact Ameyo Support via the support portal or designated email channels.

22.4.11. Contact Center - Patch Release Notes - Version 4.13.36

Release Details

Release Date: 4th-August-2025

This document outlines the feature enhancements, bug fixes, and other updates included in the ECC 4.13.36 patch release.

Highlights / Summary

This patch introduces enhancements to the `cm_cdr_history` table for improved billing reports, validates VLA storage mounting, includes security fixes for error handling and rate limiting, and addresses several bugs related to reporting and UI behavior.

- **CDR Enhancement for Billing:** Added `contact_center_id`, `crt_object_id`, and `call_id` columns to `cm_cdr_history` table to support detailed call leg reporting for billing purposes.
- **VLA Storage Mounting Validation:** Tested and validated mounting external object storage (OCI tested) for VLA voice log storage using s3fs.
- **Security Fixes:** Addressed improper error handling for CSV uploads, removed patch flag dependency for a security fix, fixed improper access control vulnerability, and implemented rate limiting.
- **Bug Fixes:** Resolved issues with duplicate entries in chat reports, ticket ID display, negative talk time logging, rule engine events, and UI password masking.

Build Versions

Key versions included in this release are:

Component	Build URL
ameyo-server	**ameyo-server-4.13.595.20250802-R_213005-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.92.20250801-R_212705-linux-gtk.x86_64.rpm**
System Smart View App	**Smart_User_App-100.0.135-R_54858.aaex**

> **Note -** Release details provided in the above table has the change only, other releases has no change and are same delivered in last patch cycle

Feature Enhancements

- **PI-VOIP-Billing (EN-143741):** The *cm_cdr_history* table has been enhanced to support detailed, call leg–based reporting. The newly introduced fields improve the traceability of each call leg across contact centers and routing configurations.

Column Name	Type	Description
contact_center_id	String/Int	Identifier of the contact center where the call landed
crt_object_id	UUID/String	Call Routing Tree object ID used in routing logic
call_id	String	Unique call identifier used to group all call legs

- **Storage Mounting in 4x VLA (EN-144138):** This task involved validation and testing of the existing storage mounting configuration within the 4x VLA environment, rather than implementing a new setup.
    - The test environment used **Oracle Cloud Infrastructure (OCI) Object Storage** as the cloud provider. Mounting was done using the **s3fs** utility with configuration parameters including bucket name and region. The access mode for validation was set to **FTP**, and the mount path on the server was **/home/testingandshared**.
    - Authentication was managed through access and secret keys securely stored in the **.passwd-s3fs** file. Appropriate permissions and access control were configured using **allow_other**, **umask**, and **use_path_request_style** options to ensure proper read/write access across dependent services.

- The objective of this exercise was to validate that the mounted bucket is accessible by Ameyo services (VoiceLog) for seamless voice log storage and retrieval.

- **Video Integration – Media Permission Issue (EN-143938):** As part of CRM integration and multimedia compatibility testing, validation was conducted to ensure smooth functioning of embedded iframe-based video calls alongside Ameyo audio calls.
  - The test involved embedding a **WebRTC-enabled video iframe** within the CRM and initiating parallel audio streams—one via the embedded video call and another via the Ameyo dialer.
  - **Key Observations:**

  1. Video and Ameyo audio calls worked without issues when used independently.
  2. During simultaneous operation, potential audio stream conflicts or merging were observed, influenced by the system's configuration and audio handling behavior.

Bugs Fixes

- **Duplicate Entries in Chat Detail Report (SL-17275):** Resolved an issue where duplicate entries appeared in the Chat Detail Report for a single chat session. The problem occurred when a chat was transferred across multiple queues, resulting in multiple rows with the same `chat_id.` The report now correctly displays a single consolidated record per chat. This issue has been fixed in the latest App Server build.

- **Incorrect Ticket ID in Ticket Summary/PDF View (SL-17273):** Previously, the HTML always contained the interactionId, which caused it to appear in the exported ticket header even when a customId was configured. The HTML generation logic has been updated to prioritize the customId when available. If no customId is configured, the `interactionId` will be displayed. The issue has been resolved in this App Server build.

- **Negative Agent Talk Time Display (SL-17165):** Logs have been added in this release to assist in diagnosing cases where agents' talk time appeared as negative. To enable detailed tracing, activate TRACE logs for the following modules:
- `cc.voicecampaign.impl.calculator.callhistory`

- `cc.voicecampaign.impl.calculator.userdispositionhistory`

- **Tickets Missing After Status Rename (SL-17125):** Addressed an issue where tickets became invisible in the UI when a ticket status was renamed (for example, from “Pending CSD” to “CSD”). The fix ensures that both `internal_state` and `external_state` fields are updated consistently during status renaming. The issue has been resolved in this App Server build.

- **Rule Engine Timer Precision (GA-15001):** Introduced a configurable flag, *officeHoursPreviousDaysLimit*, to define the number of previous days considered for Timer-Based Rules during Office Hours lookups.

  This flag is stored in the `server_preference_store` table.

  - **Configuration Details:**
    Query:
    SELECT * FROM server_preference_store WHERE key ILIKE '%officeHoursPreviousDaysLimit%';
  - Default Value: 7 days
  - Minimum Value: 0 (interpreted as 1 day)
  - Maximum Value: 30 days

- **Password Policy Reminder Popup Issue with Secure Login (SL-17301):** Fixed an issue that prevented agents from logging in after changing their passwords when both password policy enforcement and secure login were enabled. With this fix, agents can now successfully log in under these conditions in the latest App Server build.

Monitoring Data and Reports

- **Feedback Report Showing Duplicate Data (SL-17153):** Resolved an issue where the Feedback Report displayed five duplicate rows instead of the expected two when multiple feedback entries were submitted for a single interaction. To address this, an *ORDER BY 1,2* clause was added to the crosstab source query, ensuring proper grouping

by *feedback_id* and correct ordering by *question_id.* This issue has been fixed in the latest ART build.

- **Incorrect Data Order in Default Calls Quality Report (SL-17239, GA-15189):** In the Calls Quality Report, QA parameters were previously listed alphabetically, causing misalignment between parameter sequence and intended scoring order. This led to inaccurate interpretation of QA scores across campaigns. The issue has been rectified—QA parameters in the report now follow the original configuration order, ensuring correct mapping between parameters and their respective scores.

- **NBR Report Clarifications (SL-17218) (GA-15122):** Fixed a display issue in which the CRM page failed to reappear after navigating from the Knowledge Base (KB) page back to the Customer tab. The CRM page now loads correctly during tab switching. This issue has been resolved in the current App Server build.

SI Apps

- **Smart User App – Multiple Issues (SER-2882):**
  - **Agent Listing Issue:**
    Resolved an issue where agents did not appear in the listing screen when a PowerUser remained logged in continuously without logging out. The agent listing logic has been updated to exclude the PowerUser role type, preventing listing failures under such conditions.
  - **Multi-Select Filter Issue:**
    Fixed a problem with the “Select All” checkbox functionality, which previously selected only the visible items on the current page after filters were applied. The correction ensures that the “Select All” action now applies to the entire filtered dataset.

Security and Performance Updates

- **VAPT – Improper Error Handling (GA-15082):** The issue related to handling invalid CSV uploads was re-evaluated and found non-reproducible under standard error scenarios.

The system now properly handles invalid file extensions at the UI level by displaying a toast notification indicating that only .csv files are allowed. This issue has been verified and fixed in the latest App Server build.

- **Vulnerabilities in 4.x Code (SL-17090, GA-14986):** A previous security fix requiring `patch.apply=true` has been integrated directly, removing the flag dependency for this specific fix. Deployment teams must validate this configuration during rollout.
- **Deployment Note:**
  Before or after applying the patch, ensure the following:
  - Verify that patch.apply = true in the system_configuration_parameter table.
  - Manually update the value to true if not already set.

- **VAPT – Improper Access Control (GA-14865):** Addressed a reported vulnerability where authorization checks were not consistently applied before executing user operations, allowing actions to proceed regardless of user privileges. Authorization enforcement has been implemented, and the issue is fixed in this App Server build.

- **Rate Limiting for 4.x App Server (SL-17006, GA-14925):** The VAPT scan reported missing rate-limiting controls, making the App Server susceptible to excessive API requests. The fix introduces a rate-limiting mechanism where any subsequent requests made within one minute after the first successful request now return **HTTP Error 429 – Too Many Requests**, confirming rate-limit enforcement for improved API security.

Limitations / Known Issues

- No new limitations identified in this patch.

Browser and Platform Compatibility

- **Supported Browsers:** Chrome Version 138.0.7204.169 (Official Build) (arm64)
- **Mobile Apps:** No updates in this patch.

Contact Support

For issues or queries, please contact Exotel contact center Support via the support portal or through designated email channels.

22.4.12. Contact Center - Patch Release Notes - Version 4.13.35

Release Details

Release Date: 12-July-2025

This document outlines the feature enhancements, bug fixes, and other updates included in the ECC 4.13.35 patch release.

Highlights / Summary

This release includes several security fixes addressing vulnerabilities related to file upload, information disclosure, IP disclosure, username enumeration, and jQuery version. It also contains numerous bug fixes across system components, toolbar, and reporting.

- **Security Hardening:** Addressed multiple VAPT findings including insecure file upload, sensitive information disclosure, internal IP disclosure, username enumeration, and updated jQuery version.
- **Agent State Fix:** Resolved an issue where agents in break (erroneous) state received calls after WebRTC reinitialization.
- **Duplicate Ticket Prevention:** Fixed UI issue allowing multiple clicks on 'Send' button, preventing duplicate ticket creation.
- **UI Layout Fixes:** Corrected UI layout issues related to chat panel width during interaction creation and CRM page visibility after tab switching.
- **Reporting Fix:** Addressed report generation failures when using non-standard PostgreSQL ports.

Build Versions

The following table lists the updated component versions for this release.

Component	Build URL
ameyo-server	**ameyo-server-4.13.593.20250711-R_207953-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.91.20250711-R_207952-linux-gtk.x86_64.rpm**

> **Note -** Release marked in bold has the change only, other releases has no change and are same delivered in last patch cycle

Feature Enhancements

- No new features introduced in this patch. Focus is on security and bug fixes.

Bug Fixes

System Common Bugs

- **Agent State Handling (GA-15099):** Resolved an issue where agents in a Break state continued receiving inbound calls due to WebRTC reinitialization, which incorrectly triggered auto-call functionality even during an error state. The fix ensures that the break-to-break logic is not executed when the Break status is set to “error.”

- **Duplicate Ticket Creation (SL-17180):** Addressed a problem where clicking the Send button multiple times before the API call completed triggered the *createNewInteraction* function twice, resulting in two tickets being created. This behavior has been corrected in the latest App Server build.

- **Unable to Reply to Tickets When in More Than Three Chats(SL-17258):** Fixed an issue where the chat panel expanded to the full width of the screen (100%) during active chats, hiding the Send and Cancel buttons. The panel width has been limited to 75%, ensuring both buttons remain visible and functional during interaction creation.
- **Case ID–Based Resolver – New Messages Linked to Expired Tickets (GA-14939):** Resolved an issue where new messages were appended to existing tickets that

remained in an Expired status, causing them to be hidden from the UI. The updated logic now considers only tickets with active statuses—New, Open, Pending, or Closed—so that all valid tickets are visible as expected.

- **CRM Page Not Reappearing After Returning from Knowledge Base (SL-17251):** Fixed a display issue where the CRM page did not reappear after switching from the Knowledge Base page back to the Customer tab. The CRM view now loads properly during tab switching. This has been resolved in the current App Server build.
- **Interaction History vs Front-End Discrepancy (GA-14630):** Corrected an error that created duplicate entries in interaction history. When agents opened new incoming mail from the dashboard, an incorrect "all messages read" activity was logged in addition to the mail entry. The issue has been fixed so that only one interaction history entry is generated per mail opened.

Voice

- **NA**

Toolbar

- **WebRTC Call Answering- Calls Stuck in Queue with Beep Sound (SL-17051):** Resolved an intermittent issue where agents were unable to answer calls initiated via the click-to-call API on their WebRTC extensions. The problem caused calls to remain stuck in the queue with a continuous beep sound. This behavior has been corrected in the latest build tag.
- **Generic Toolbar Integration and Testing (SL-17221):** Fixed an issue where the event handler failed to respond to login errors due to improper case handling. The updated logic now ensures proper functioning for both successful and forced login scenarios. This issue has been resolved in the current App Server build.

Fusion(IC, Chat, Social Media)

- **NA**

Monitoring Data and Reports

- **IVR call Card Block Failure (GA-15024):** Resolved an issue where the CRM Report and CRM Lead Report failed when PostgreSQL was running on port 5433. The failure

occurred because the dblink connection in the *get_crm_detail_history_table_columns* function did not specify the required port. A new function has been created with the correct port configuration, and the issue has been fixed in this ART build.

Debugging Docs / SOPs

- **Interaction Ticket Not Created for Unanswered Chats (SL-17093):**
  - The system behavior for missed or unresponded chats has been enhanced:
  - For missed chats, the system now logs the missed chat event when the user is unavailable and ensures appropriate handling for the specific Chat ID.
  - For forced logouts, the system performs a cleanup process that records session and campaign details, manages forced-closed chat sessions, and ensures proper closure and logging for those interactions.

Security and Performance Updates

- **VAPT – Insecure File Upload (GA-15080):** Implemented regex validation and a secure keyword filter in the “Upload JRXML” field to prevent uploading files with nested or harmful extensions (for example, .php). The application now strictly allows only valid .jrxml files, successfully blocking unsafe file types. Fix verified in the latest build.

- **VAPT – Sensitive Information Disclosure (GA-15078):** Resolved an issue in the *getAllDataSource* API where the response payload inadvertently exposed sensitive details, including the database connection URL, username, and password. These parameters were unused in subsequent flow. The unused sensitive fields have been removed from the response to prevent exposure and ensure secure handling of configuration data.

- **VAPT – Internal IP Disclosure (GA-15077):** Addressed an issue where the */cc/userBreak* API response exposed internal IP information. The error response has been modified to

exclude internal system details, ensuring sensitive data such as IP addresses and domain names are no longer exposed.

- **VAPT – Username Enumeration (GA-15076):** Fixed a security concern where distinct error codes were returned for incorrect user IDs and passwords due to different exception handling. The same exception class is now used for both cases, ensuring a unified error response and preventing username enumeration.
- **VAPT – jQuery Version Upgrade to 3.7.1 or Later (GA-15067):** Upgraded the jQuery version in the App Server build from 3.5.0 to 3.7.1 to mitigate known vulnerabilities and enhance security compliance.

Limitations / Known Issues

- No new limitations identified in this patch.

Browser and Platform Compatibility

- **Supported Browsers:** Chrome Version 138.0.7204.93 (Official Build) (arm64)
- **Mobile Apps:** No updates in this patch.

Contact Support

For issues or queries, please contact Exotel contact center Support via the support portal or through designated email channels.

22.4.13. Contact Center - Patch Release Notes - Version 4.13.34

Release Details

Release Date: 5-June-2025

Short description: This release includes security fixes related to host header injection and validation, VLA API fixes, and resolves various bugs impacting API functionality, user state management, UI display, and agent call handling.

Highlights / Summary

- **Security Fix (Host Header Injection):** Implemented validation for incoming request hosts against an allowed list configured in the `.ini` file.
- **VLA API Fix:** Resolved an issue with the "Fetch Voicelog by CRT Object ID" API failing in scenarios with multiple call IDs.
- **API Functionality:** Fixed issues with a real-time dashboard API and agent availability reporting in node flows.
- **Agent State Management:** Addressed inconsistencies related to agents receiving calls on multiple extensions during fallback and duplicate agent ID displays in monitoring.
- **UI Fix:** Resolved an issue where Supervisor UI showed duplicate agent IDs in live monitoring.

Build Versions

The following table lists the updated component versions for this release.

Component	Build URL
ameyo-server	**ameyo-server-4.13.592.20250603-R_199682-linux-gtk.x86_64.rpm**
ameyo-art	**ameyo-art-4.13.89.20250603-R_199679-linux-gtk.x86_64.rpm**
management-server	ameyo-management-server-3.15.128.20220819-R_53820.x86_64
management-UI	ameyo-management-server-ui-3.15.79.20220825-R_54354.x86_64
ameyo-asterisk	ameyo-asterisk13-100.0.123.20230202-R_54429_el7-linux-gtk.x86_64.rpm ameyo-asterisk13-100.0.122.20230201-R_77845_el8.x86_64.rpm
ameyo-asap	ameyo-asap-100.0.19.20210708-R_53436-linux-gtk.x86_64.rpm ameyo-asap-100.0.31.20231212-R_122778_el8-linux-gtk.x86_64.rpm
ameyo-djinn	ameyo-djinn-100.0.411.20250115-R_176400.x86_64.rpm
ameyo-codec	ameyo-codecs13-100.0.10.20180312-R_37320.i386.rpm ameyo-codecs16-3.10.1-20150917-linux-gtk.x86_64.rpm
ameyo-crm	ameyocrm-100.0.379.20240516-R_54694.x86_64.rpm
JDK	java-1.8.0-amazon-corretto-devel-1.8.0_312.b07-1.x86_64.rpm
CAF Google Play Store	caf_googlePlay-100.0.37.20231011-R_112974.x86_64.rpm
CAF Youtube	caf_youtube-100.8.0.20230904-R_54528.x86_64.rpm

Component	Build URL
UI Less Integration - Zoho Connector laravel build	zoho-connector-100.0.36.20230817-R_104650.x86_64.rpm
UI Less Integration - Zoho User Management app	zoho_CRM_Connector-100.0.10-R_54327.aaex
WFM NICE Response Transformation App	NICE_Connector_App-100.0.13-R_54375.aaex
AMF for whatsapp, cogno and Instagram integration	AMF-100.0.239.20250327-R_54787.x86_64.rpm
Voicelog Privilege App	Voice_Log_Privilege_App-100.0.61-R_54105.aaex
Dial User App	Dial_User_App-100.0.31-R_51344.aaex
System Smart View App	Smart_User_App-100.0.94-R_54159.aaex
Plck Call App	pick_Call_App-100.0.36-R_51381.aaex
Bulk Operation App	Bulk_operation-100.0.48-R_51285.aaex
Desktop Notification App	NotificationApp-100.0.29-R_52192.aaex
Agent Signature App	Agent_signature_app-100.0.27-R_51283.aaex
Agent Self Monitoring App	Agent_Self_Monitoring-100.1.98-R_51265.aaex
Redirection App	RedirectionApp-100.0.3-R_51489.aaex
Quota App	quota_management_app-100.0.74-R_54362.aaex
Skill Monitoring App	skill_monitoring_app-100.0.14-R_54167.aaex
Routing Test App	RoutingTest-100.0.1-R_54180.aaex
Debugger App	DebuggerApp-100.0.7-R_54338.aaex
ACP	acp-100.1.92.20231130-R_120901.x86_64.rpm
amd	ameyo-amd16-100.0.31.20210521-R_52916-linux-gtk.i386.rpm
zabbix	ameyo-zabbix-100.0.127.20221115-R_63336.el7.x86_64.rpm

Component	Build URL
	ameyo-zabbix-agent-100.0.54.20210617-R_53204.x86_64.rpm
failover	ameyo-failover-100.0.29.20230504-R_89111.x86_64.rpm
Video micro service	video-4.13.110.20240304-R_133174.x86_64.rpm
Voice Agent mobile app	Android - Voice Agent App 5.7.5-R (Voice-Agent-5.7.4.20211011-release.apk) Ios - Voice Agent App 3.3
Field Agent mobile app	Android - Field Agent App 5.4-R (ameyo.fieldagent.com-5.4.20230905-release.apk) Ios - Field Agent App version 3.3
Supervisor mobile app	Android - Supervisor App : com.ameyo.supervisor-2.1.20210812-release.apk Ios - moved to live on apple store
grafana	grafana-7.1.4-1x86_64.rpm
SFDC Integration app	CRM_Integration-100.0.8-R_54454.aaex

> *Note: Only components with significant changes are listed. Full build details are available in internal documentation.*

Feature Enhancements

- No new features introduced in this patch. Focus is on security and bug fixes.

Bug Fixes

System Common Bugs

- **Real-time Dashboard API (SL-17050):** Fixed an issue where a REST API intended for real-time logged-in user data failed when executed with a JWT token.

- **Agent Availability Node (SL-16896):** Resolved an inconsistency where the Agent Availability Node reported incorrect statuses when used at the queue level compared to the campaign level.
- **Extension Fallback Issue (SL-17054):** Fixed an issue where agents received calls simultaneously on WebRTC and dual-call-leg extensions during extension fallback, leading to erroneous states.
- **Supervisor Monitoring UI (SL-16973):** Addressed an issue where Supervisor live monitoring randomly displayed duplicate agent IDs, particularly when `allowMultipleExtension` was false.

VLA

- **Voicelog Download API (SL-17029):** Corrected the "Fetch Voicelog by CRT Object ID" API to handle scenarios with multiple call IDs correctly, ensuring the proper recording is fetched even if entries without `recording_dacx_uri` exist.

Security and Performance Updates

- **Arbitrary Host Header Injection (GA-14877):**
  - Earlier, the system did not validate the host specified in incoming requests, which allowed requests with any host value to pass through successfully.
  - **Update:**
    The system now validates the host in each request against a list of approved hosts. Administrators can define this list in the server's `.ini` configuration file.

Limitations / Known Issues

- No new limitations identified in this patch.

Browser and Platform Compatibility

- **Supported Browsers:** Chrome Version 137.0.7151.56 (Official Build) (arm64) or later is recommended.
- **Mobile Apps:** No updates in this patch.

Hot Fixes Included (from previous versions if applicable)

- **Report Upload Security (GA-15080):** Added regex validation and keyword filtering to the "Upload JRXML" field in reporting to prevent insecure file uploads (Included via Art build ameyo-art-4.13.90).

Contact / Support Information

For issues or queries, please contact Exotel contact center Support via the support portal or through designated email channels.

22.4.14. Contact Center - Patch Release Notes - Version 4.13.33

22.4.15. Contact Center - Patch Release Notes - Version 4.13.32

22.4.16.

Contact Center - Patch Release Notes - Version 4.13.31

22.4.17.

Contact Center - Patch Release Notes - Version 4.13.30

23. Contact Center Support Details

23.1. Contact Center Product Release Lifecycle & Support Periods

23.2. Contact Center Premium Support & Process Guide

23.3. Contact Center Standard Support & Process Guide

24. FAQs

24.1. Archival Solution FAQs

24.1.1. Interaction Archiver FAQs

1. What is the default view when opening the Interaction Archiver?

- A blank page is displayed with a prompt asking the user to select a campaign and date range.

2. What is the maximum date range I can search at once?

- You can search for archived interactions within a maximum date range of 30 days per query.

3. Can I select multiple campaigns or media types in one search?

- No, the current design allows for selecting only one campaign, one media type, and one customer detail entry per search.

4. The filter previously named "Media Details" isn't working as expected?

- This filter has been renamed to **Customer Details** and is designed to search for customer-specific information like Email ID or Name. Functionality for this filter was corrected in the 4_13_32 release.

5. Why can't I find interactions using just the Customer ID or Interaction ID?

- Searching by Customer ID, Interaction ID, or Ticket ID requires you to *also* select the mandatory Campaign and a valid Date Range (within 30 days) where the interaction occurred. The search is confined within those primary filters.

6. Which user roles can access the Interaction Archiver?

- Only users with Admin or Supervisor privileges can access this feature.

7. As a Supervisor, why can't I see interactions from a campaign that was recently deleted?

- Supervisors currently only have access to archived interactions from their *active* campaigns. Access to deleted campaign archives is restricted to Admin users.

8. Are voice call recordings or video recordings archived here?

- No, voice and video archival are handled separately and require VLA (Video/Voice Log Archiver) configuration. They are not part of the standard Interaction Archiver scope.