

Online customer service system

Absoloop

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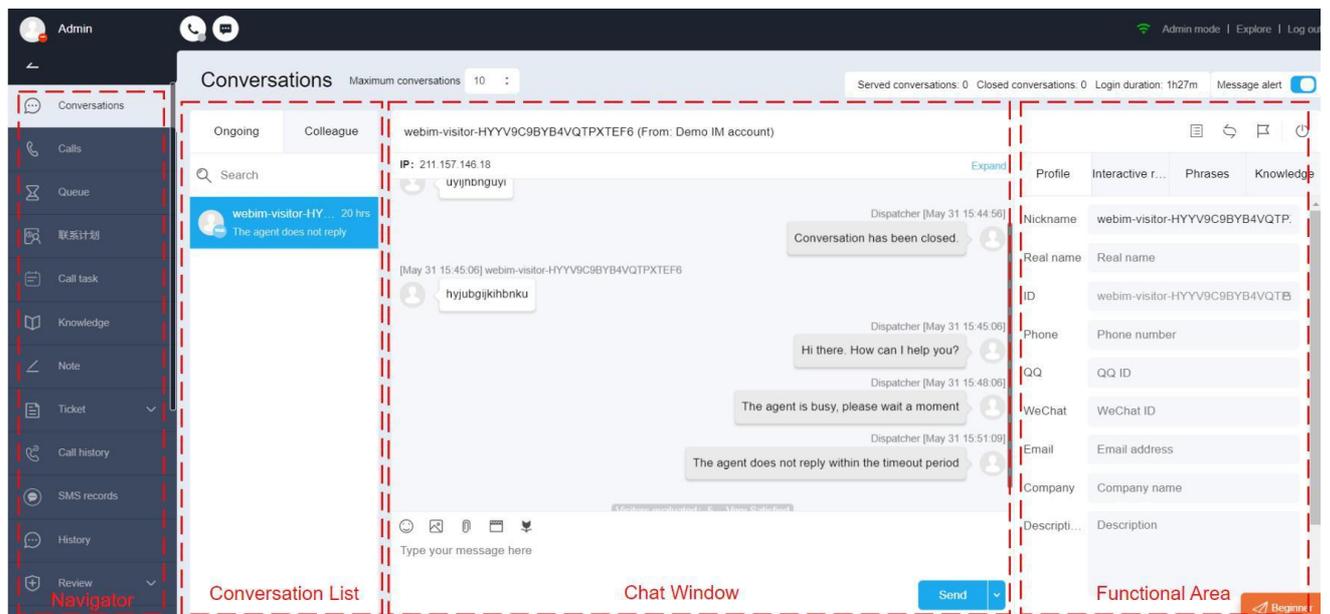
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Agent Mode

Conversations

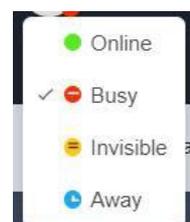
On the Conversations page, agents can have conversations with customers and colleagues.



- **Navigation pane:** it displays all the pages in the Agent Mode. For example, the agent can switch to History or Analytics via the navigation pane.
- **Conversation list:** it displays ongoing conversations with customers and conversations with colleagues. The ongoing conversation tab contains the customer name, message time, message content, channel, and so on.
- **Chat window:** it displays the source of the conversation, the history message, and the input box.
- **Functional area:** In this area, the agent can complete the customer portrait (by editing the customer profile and adding customer tags) and manage the conversation (by transferring it to another agent or team, initiating satisfaction evaluation, adding conversation tags, and closing the conversation)

Online status

The online status of an agent or admin includes: online, busy, away, invisible, and offline.



- **Online:** After logging in to the Absoloop Customer Service System, the agent is online, and can receive conversations automatically assigned by the system and accept conversations transferred from colleagues.
- **Busy:** The busy agent can continue to handle ongoing conversations and accept conversations transferred from colleagues but will not receive conversations automatically assigned by the system.
- **Invisible:** After logging in to Absoloop Customer Service System in invisible mode, the agent is invisible. What the agent can do is same as Busy status.
- **Away:** What the agent can do is same as Busy status.
- **Offline:** After logging out, the agent is offline; or if the agent closes the browser, the agent is offline in 30 seconds. The offline agent will not receive conversations automatically assigned by the system and cannot accept conversations transferred from colleagues.

When online, busy, away, or invisible, the agent can click the status icon to the right of his avatar to switch to another state.

Maximum conversations

The maximum conversations refers to the conversations that the agent can have with customers at the same time. It can be adjusted.

- If the number of ongoing conversations is greater than or equal to the maximum conversations, the system will not automatically assign conversations to the agent.
- If the maximum conversations is set to 0, the system will not automatically assign conversations to the agent.
- If the agent wants to have more ongoing conversations, he can increase the value of the maximum conversations.

Ongoing conversations

When an agent is online and the maximum conversations is not full, the system will automatically assign conversations to the agent. The agent can switch to different conversations from the ongoing conversation list.

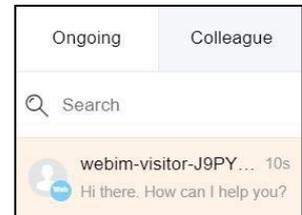
- When a agent transfers a conversation to a colleague, the conversation disappears

from its own ongoing conversation list and enters the colleague's ongoing conversation list.

- When the agent closes a conversation or a conversation is automatically closed by the system due to timeout, the conversation disappears from the agent's ongoing conversation list and becomes a history conversation on the History page.

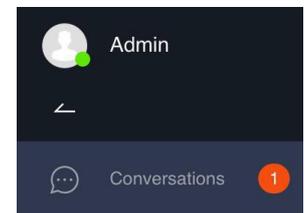
New Conversation Reminder

When an agent has a new conversation, the conversation goes to the top of the ongoing conversation list and has a background color.



New Message Reminder

When an agent receives a new message, the Conversations page displays a message bubble, including the number of unread messages.



Popup Message

If an agent is online but is not viewing the system, when the agent receives a new message, a popup window is displayed, showing the latest message content. When there are consecutive



messages within 3 seconds, only one notification will be displayed, showing the last message.

Prerequisite: When the browser display the first popup window, the agent must allow the popup message.

Receive messages

Which types of message can agent receive:

- Text
- Emoji emoticons
- Image

- Voice
- Location
- URL address
- WeChat video
- Custom messages: track messages, order messages, etc

Send messages

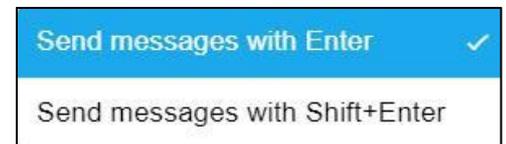
Message type

Which types of message can agent send:

- Text
- Emoji emoticons
- Image: You can upload a JPG, PNG, or GIF file. The maximum file size is 10MB.
- File: The maximum file size is 10MB.
- Audio/Video
- Phrase
- Custom messages

Shortcut

- Ctrl+V: paste a picture to the input box
- Enter or Shift+Enter: send a message
- Enter or Shift+Enter: start a new line



Resent messages

If a message fails to be sent, a red exclamation mark appears on the ongoing conversation list and to the left of the message. To resend the message, click the red exclamation mark to the left of the message.

Conversational process

Edit customer profile

During a conversation, the agent can edit the customer profile, including the customer's nickname, real name, phone number, QQ, mail address, company name and other information. When the customer starts another conversation, the system automatically displays his profile.

The customer ID uniquely identifies the customer. It cannot be edited.

Profile	Phrases	Knowledge	Interactive record
Nickname	webim-visitor-HYYV9C9BYB4VQTPXTEF6		
Real name	Real name		
ID	webim-visitor-HYYV9C9BYB4VQTPXTEF6 <input type="text"/>		
Phone	Phone number		
QQ	QQ ID		
WeChat	WeChat ID		
Email	Email address		
Company	Company name		
Descripti...	Description		

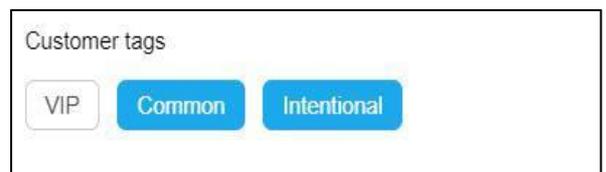
It also provides a third-party CRM system integration solution to connect to your own Customer Relationship Management (CRM) system. For more information, see CRM System Integration.

Updates to customer profiles in the CRM system will not be synchronized to the Absolooop customer service system.

Add customer tag

Customer tags are used to classify and manage customers. During a conversation, the agent can add customer tags to the customer from the Profile tab.

Customer tags are set by admins on the “Admin Mode > Settings> Customer Tags” page. Agents cannot edit them.



One or more customer tags can be added to one customer. Conversations can be filtered based on the customer tags on the History page.

Add conversation tag

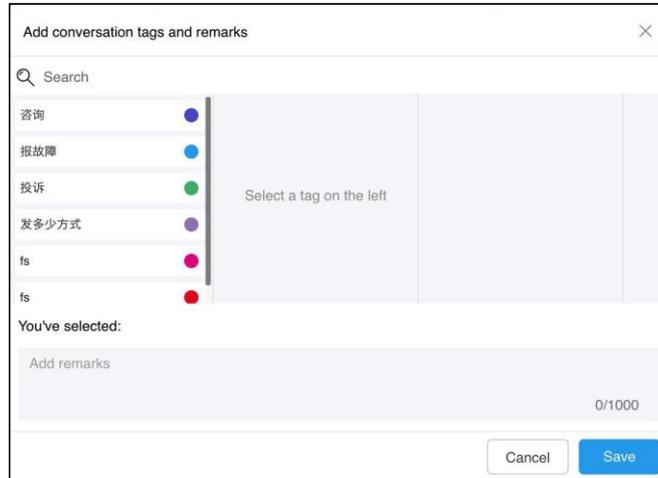
Conversation tags are used to classify conversations. During a conversation, the agent can click the “Conversation Tags”  button "Conversation tags to search for and add conversation tags. After a conversation is closed, the agent can still add conversation tags to the conversation on the

History page.

Conversations tags can be changed during a conversation or after the conversation is closed.

Conversation tags are set by admins on the “Admin Mode > Settings> Conversation Tags” page.

Agents cannot edit them.



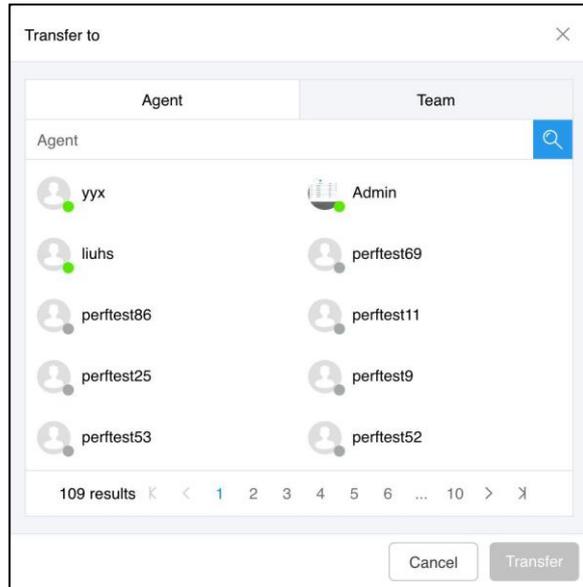
Transfer conversation

When the agent is unable to handle the business or the customer specifies to chat with another agent, the agent can transfer the conversation to other agent or teams.

Transfer to Agent

During a conversation, the agent can click the Transfer button to transfer, then choose an agent, and then click “Transfer” to transfer the conversation. In the Transfer To dialog box, mouse hover the nickname of the colleague to see his real name.

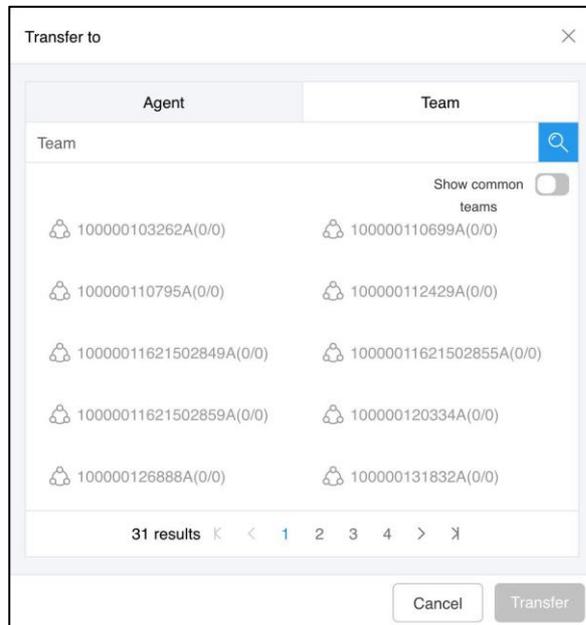
- When the switch "Require confirmation for conversation transfer" on the "Admin mode > Settings > Function settings" page is turned on, the agent who receives a conversation transfer must confirm it; otherwise, the conversation cannot be transferred.
- When the switch "Require confirmation for conversation transfer" on the "Admin mode > Settings > Function settings" page is turned off, the conversation is directly connected to the in-process conversation list of the target agent.



A conversation can be transferred for multiple times. When the total number of conversations is counted, the conversation is one conversation; when the number of conversations of an agent is counted, the conversation belongs to each agent who have joined the conversation.

Transfer to Team

During a conversation, the agent can click the Transfer button, then choose a team, to transfer the conversation.



When an agent transfers a conversation to a team:

- If there are agents in the team, the conversation either is assigned to the agent with the highest idle rate or goes to the queue when none of them is idle.
- If there are no agents in the team, the conversation cannot be transferred to the

team.

Satisfaction Ratings

During a conversation, the agent can invite the customer to rate the conversation. Click the "Satisfaction Ratings" button to invite the customer to rate the conversation. The rating options are as follows: five stars (very satisfied), four stars (satisfied), three stars (neutral), two stars (dissatisfied), one star (very dissatisfied), and the customer can also add remarks.



To collect the satisfaction rating for each conversation, the admin can turn on the "Automatically invite customers to rate conversations" feature on the "Admin Mode > Settings > Function Settings" page. If the agent didn't invite the customer to rate the conversation and the customer didn't take the initiative to rate the conversation, when the conversation is closed, the system automatically sends a satisfaction evaluation invitation to the customer.

Note : During a conversation, the agent can only send the invitation once.

Close conversation

When an agent has answered a customer's inquires, the agent can click the "Close Conversation" button to close the conversation.

Note: If the admin turns on the "Force add conversation tag" feature, the agent must add at least one conversation tag to the conversation before closing it.

Automatically Close Conversations

The system can automatically close conversations if customers do not response for a preset time period.

Prerequisite: The admin must go to "Admin Mode > Settings > System Settings", and turn on

the “Close conversation if the customer does not reply” feature.

Add to Blacklist

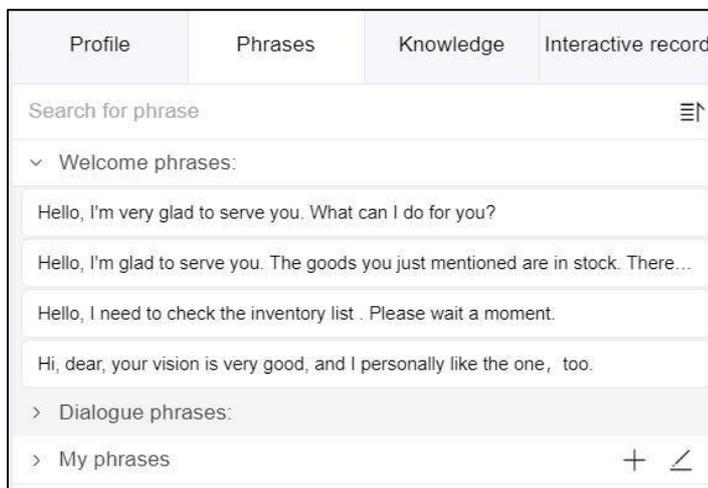
During a conversation, if the agent feels harassed by the customer, the agent can add the customer to the blacklist. Then, the conversation is automatically closed. Blacklist customers cannot have conversations with agents until they are removed from the blacklist.

To add a customer to the blacklist, click the “Add to Blacklist” button on the “Profile” tab and fill in your reason.

Editing Phrases

A phrase is a commonly used message that the agent sends to the customer. Phrases are classified as public phrases and personal phrases.

- Public phrases are set by the admin for use by all agents. On the “Admin Mode > Settings > Phrases” page, admins can add multiple level 1 categories, multiple level 2 categories, and multiple phrases in each category.
- Personal phrases are set and used only by the agent. On the Conversations page, on the Phrases tab, the agent can add multiple level 2 categories and multiple phrase in each category.



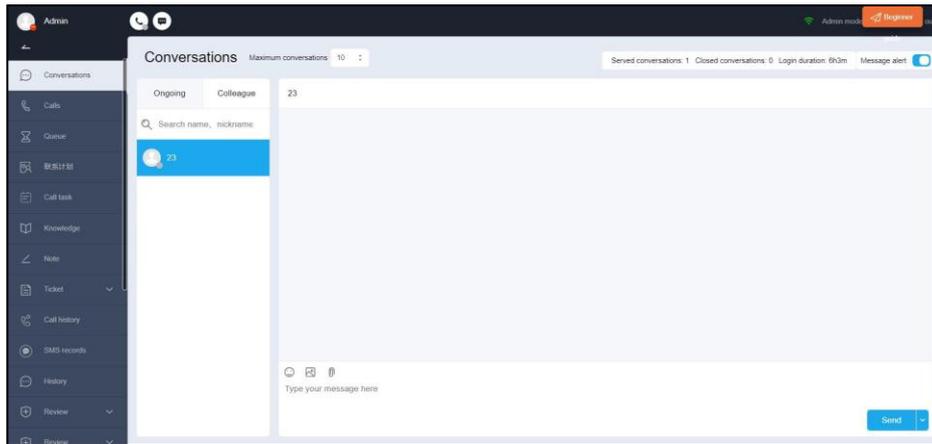
Recall Messages

Recalling messages is supported. When having a conversation with a customer from app or web, the agent can recall his messages within 2 minutes after the messages are sent. After a message is recalled, it will disappear from the customer's chat window.

The message recall function is a value-added service. To activate it, please provide the tenant ID and contact the Hyphenate.

Conversation with colleagues

The Colleague tab displays information of the agent's colleagues, including the colleague's avatar, nickname, and online status. To see the real name of the colleague, place your mouse on your colleague's nickname.



- The agent can chat with colleagues in the online/busy/invisible/away status.
- The agent can also send messages to offline colleagues. Those messages will be read when the colleagues go online.

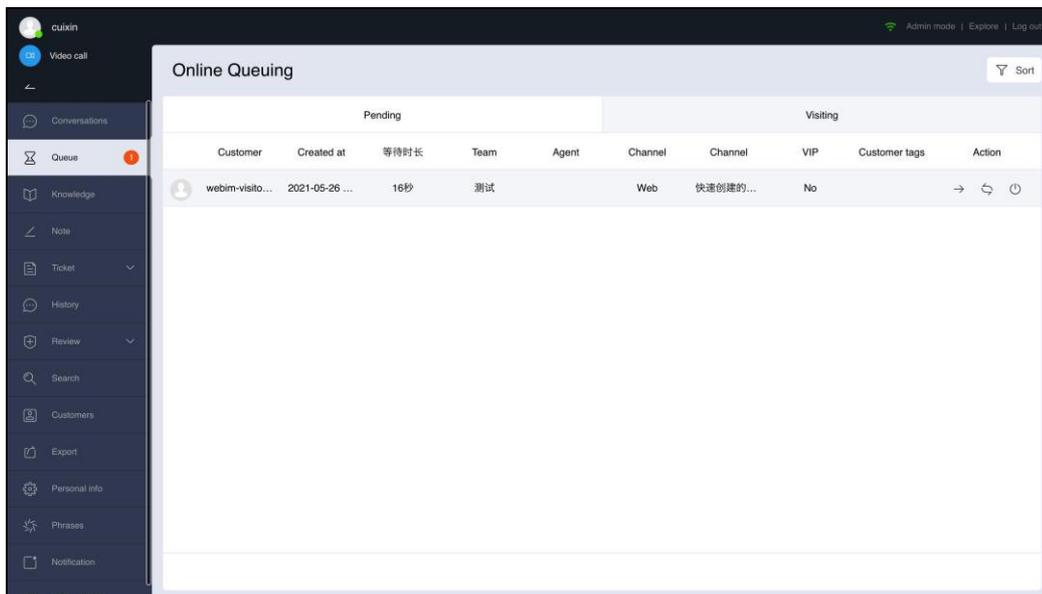
When a new message from a colleague arrives, a red dot appears besides the Colleague tab name to remind the agent. Chat messages with colleagues will be saved in the chat window.

Queue

The Queue page displays conversations waiting to be served. A conversation will enter the Queue if either of the following occurs:

- The agent or admin is busy, away, invisible or offline.
- The maximum conversations of the agent or admin is full.

An agent's Queue displays queued conversations for the agent. An admin's Queue displays queued conversations for all agents and admins.



Automatically Assign Conversations

The queued conversations are sorted based on VIP customers and the creation time. The first queued conversation is in the forefront and is preferentially assigned. Conversations created by VIP customers are placed in front of other conversations; if there are multiple conversations of VIP customers, the conversations are sorted by the creation time.

Manually Join Conversations

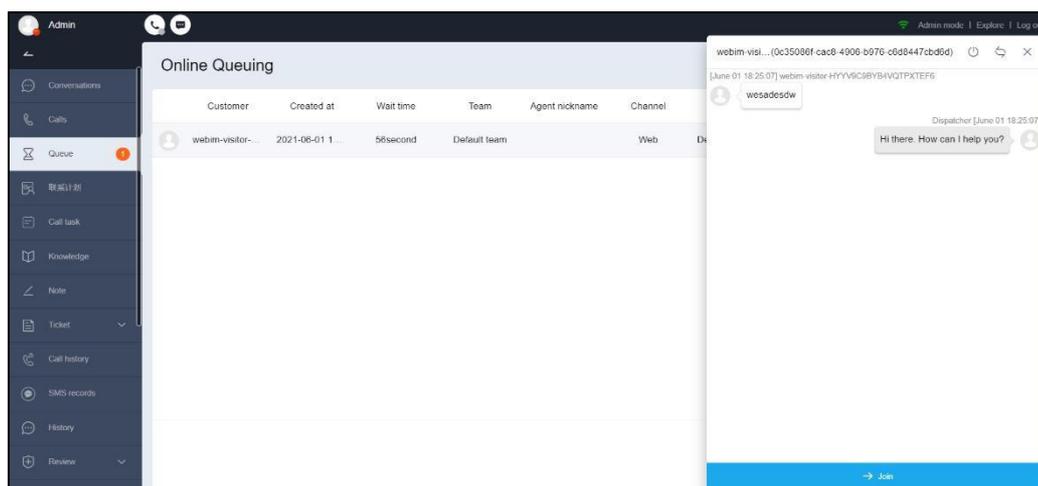
On the queue list, an agent can manually join conversations by clicking the Join button. Admins not only can join conversations but also can assign conversations to other agents and close the conversations.

Both agents and admins can join conversations preferentially based on the customer tags. The customer tags may come from:

- Frequent customer: The customer tags are added to this customer during previous conversations.
- Customer transferred to a team: An agent added customer tags to the customer before transferring the customer to a team that is busy.

View Queued Conversation Details

On the Queue page, an agent can click a queued conversation to view its messages.

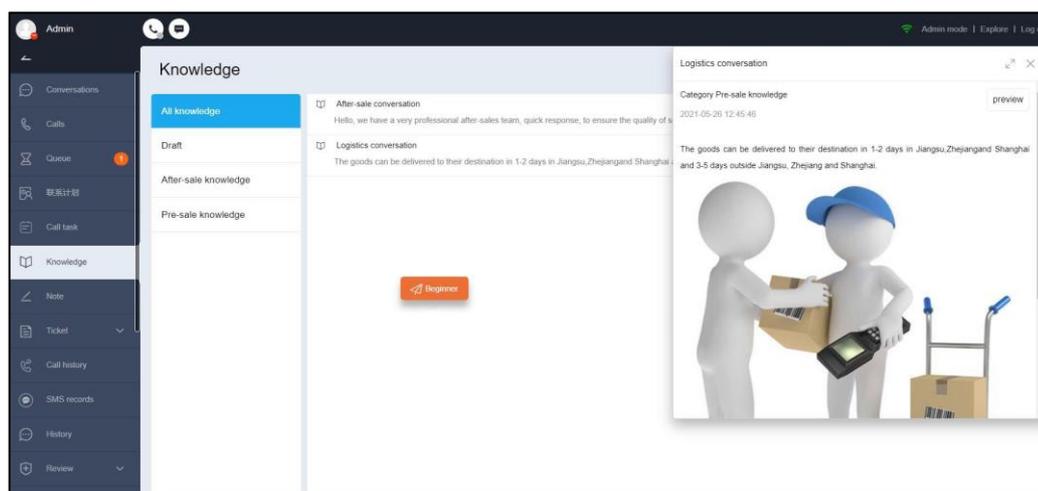


Prerequisite: The admin must go to the “Admin Mode > Settings > Function Settings” page and turn on the “Allow agents to view details of queued conversations” feature.

Knowledge

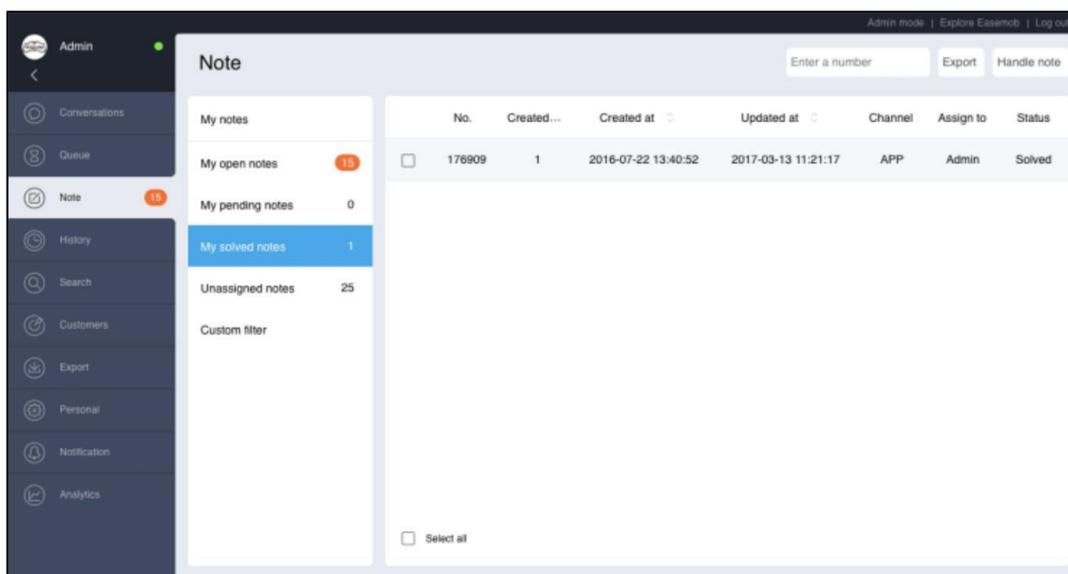
“Knowledge” contains accumulated, summarized and precipitated experience, such as product introduction, function description, business process, etc. Each piece of knowledge consists of a title, knowledge content and attachments. The knowledge in “Knowledge” is edited by the administrator, and the agent can view it in the “Conversation” and “Knowledge” pages.

In the “Agent Mode > Knowledge” page, you can select the knowledge category, click any one of the knowledge, to view the details of the knowledge.



Note

When customers have been waiting for a long time or agents are too busy to reply to them in time, the customers can choose to leave a note instead. On web widgets, if the robot is offline at non-work hours, the widgets display the note form by default. Customers' notes are different from conversations and do not go to the Queue.



At present, customers can leave notes only on apps and web widgets (including both desktop and H5 chat windows).

History

On the History page, agents and admins can view the closed conversations, messages, and customer profiles. The conversation list shows the customer name, agent name, start time (join or transfer time), conversation tag, transfer status, channel, and channel account. The conversations can be filtered based on these information.

- On the History page in Agent Mode, agents and admins can only view the conversations served by themselves.
- On the History page in Admin Mode, admins can view the conversations served by all agents.

Customer	Last customer service	Access time	Conversation types	Channel	Action
webim-visitor-TPGY4XPFXT...	cuixin	2021-05-26 15:38:27	Inbound	Web	↻
webim-visitor-TPGY4XPFXT...	cuixin	2021-05-26 12:08:50	Inbound	Web	↻
webim-visitor-TPGY4XPFXT...	cuixin	2021-05-26 12:02:10	Inbound	Web	↻
webim-visitor-TPGY4XPFXT...	cuixin	2021-05-26 11:52:33	Inbound	Web	↻
webim-visitor-TPGY4XPFXT...	cuixin	2021-05-26 11:46:21	Inbound	Web	↻
webim-visitor-EVEYBXP8T...	cuixin	2021-05-26 11:30:35	Inbound	Web	↻
webim-visitor-EVEYBXP8T...	cuixin	2021-05-25 20:29:21	Inbound	Web	↻
webim-visitor-EVEYBXP8T...	cuixin	2021-05-25 20:25:31	Inbound	Web	↻
yyx-ceshi	cuixin	2021-05-25 19:11:33	Inbound	Web	↻
yyx-ceshi	cuixin	2021-05-25 18:50:44	Inbound	Web	↻
yyx-ceshi	cuixin	2021-05-25 18:40:26	Inbound	Web	↻

Review

“Review” includes two parts: “Review records” and “Appeal records”. On the “Review records” page, the agent can view review results of conversations and request an appeal; on the “Appeal records” page, the agent can view the progress of the appeal and communicate with the inspector.

The function of review appeal is used by agent, after the inspector reviewed the service of the conversation, if a agent thinks that the result is unreasonable, he/she can appeal to the inspector who has scored, submit evidence and request to review the results.

Conversation ID	Appeal No.	Subject	Applicant	Inspector	Date and time	Status	Appeal Result
f5a5a7b1-291...	2106010001	test	admin	admin	2021-06-01 18:57:42	Pending	
e7961ba8-8d...	2105260001	23	admin	admin	2021-05-26 17:58:01	Closed	Success

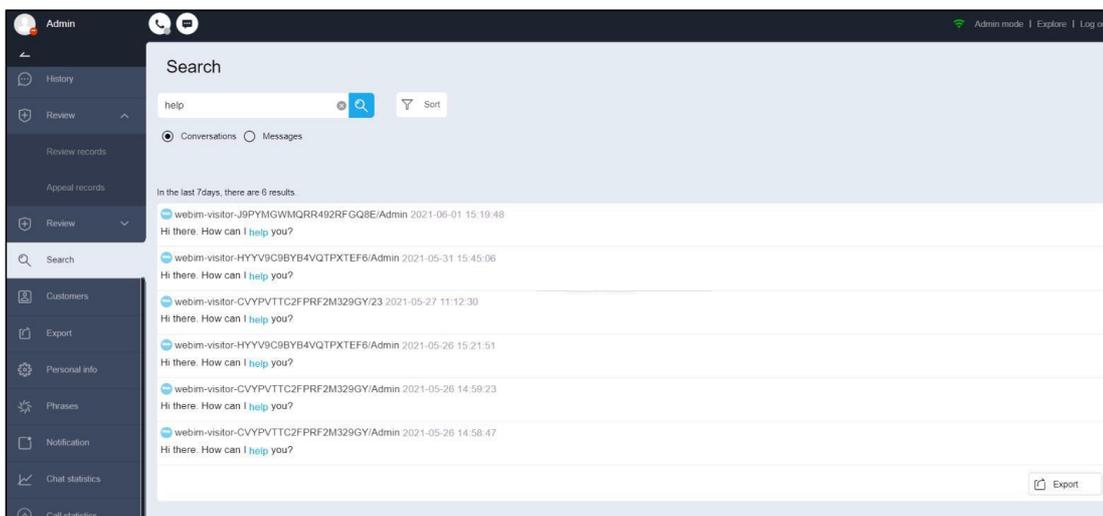
Search

Search for conversation, message

On the "Search" menu page, the agent can search historical conversations and messages.

By default, the search result only includes conversations created within the last 30 days. Click "Sort" to modify the search result. The search result can be filtered based on the channel, channel account, and conversation tag.

From the search result, click any conversation or message to view the corresponding conversation detail.



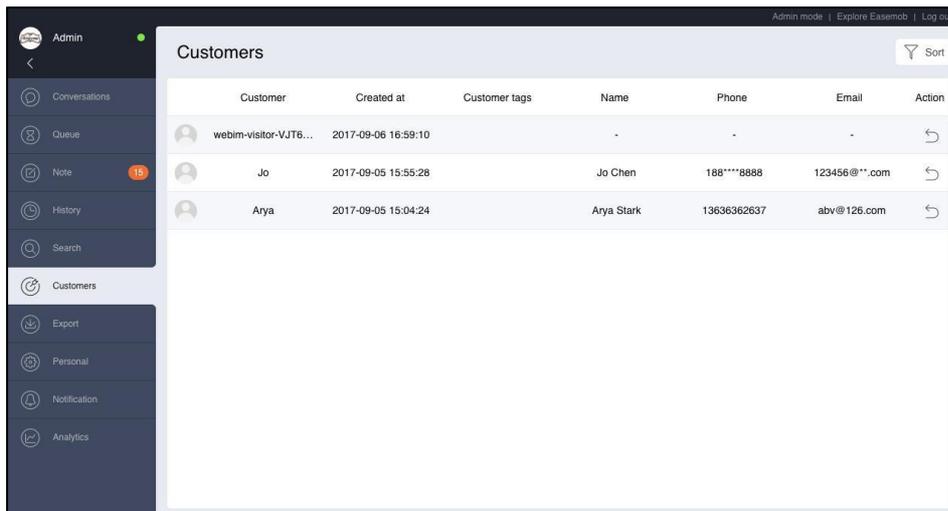
Customer

The Customers page shows all the customers who are served by the agent. The agent can view the customer profiles and manage the customers.

On the Customers page, click a customer to view the customer profile (nickname, real name, ID, phone, QQ, email, company, etc.).

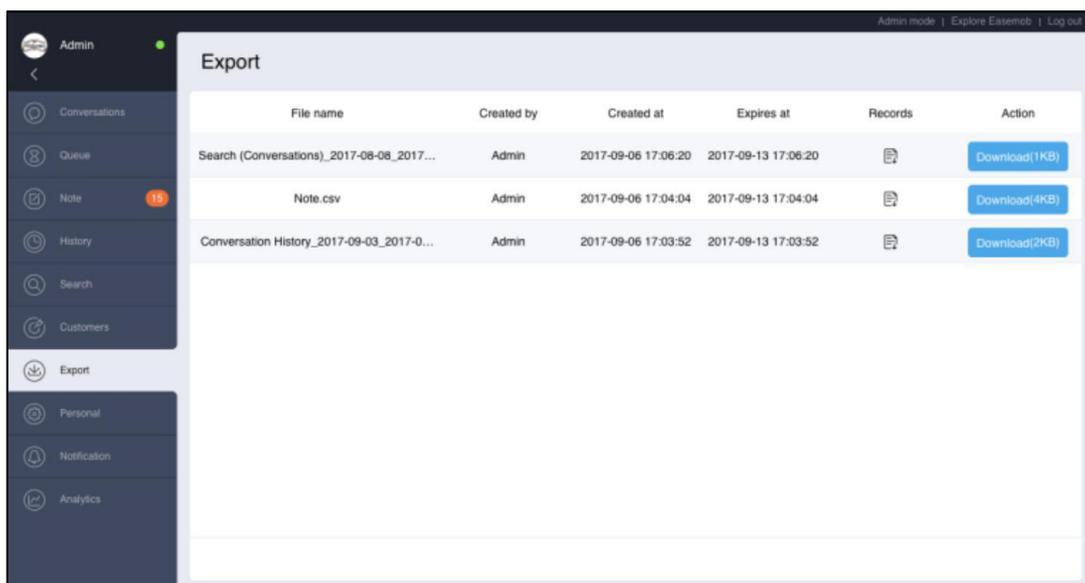
Go to the Interaction page to see the list of the customer's historical conversations and satisfaction ratings.

To remove a customer from the blacklist, select the customer and click the "Remove from Blacklist" button on the "Profile" tab.



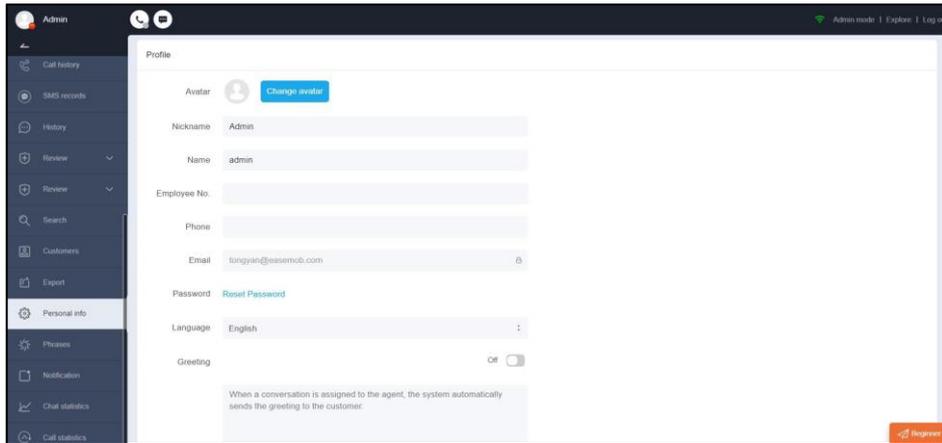
Export

On the "Export" page, the agents and administrators can download the export files and view the download records of each export file, including agent name, download time and IP address.



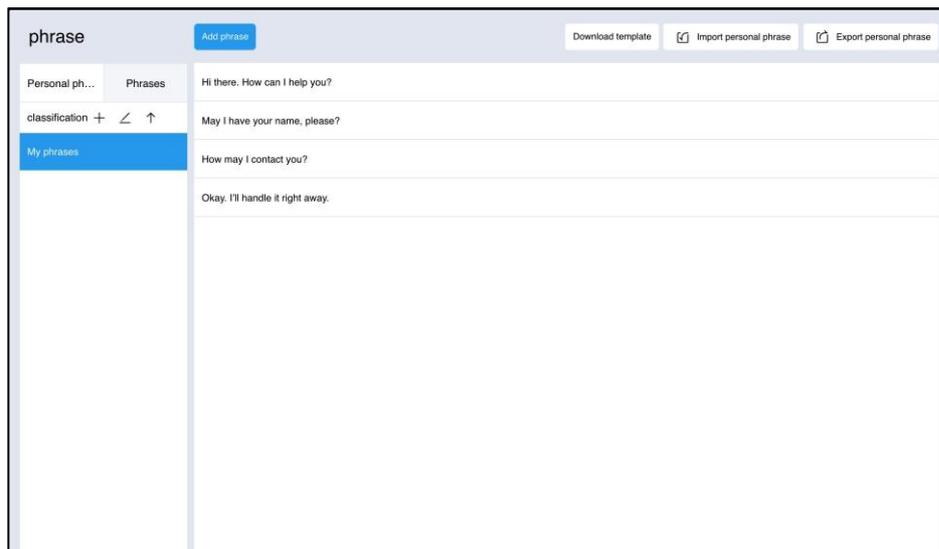
Personal info

Agents and admins can set their own personal information (avatar, nickname, name, employee ID, and phone number), modify the login password, set the interface language, and set their personal greetings.



Phrases

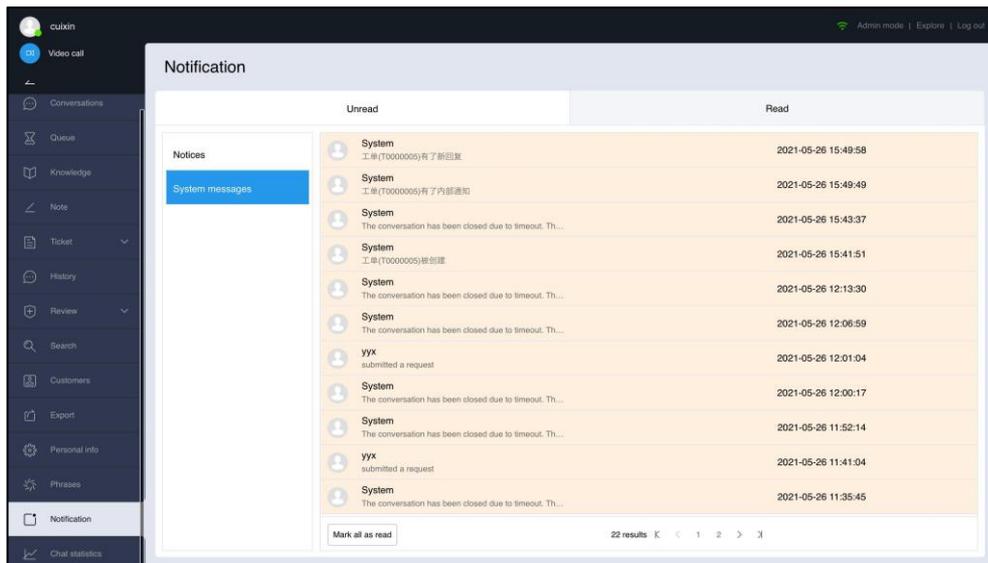
Add special characters and default address (##dear##) , When the customer's nickname is valid, the customer's nickname is displayed; when the customer's nickname is invalid, the default address (##dear##) is displayed. The default address can be customized. For example, you can set the agent greeting as "##dear##, hello, I'm glad to serve you!"



Note: the agent's greeting are not automatically sent during off hours.

Notification

When there is an event that requires the agent's attention, the system automatically sends a message to the agent and reminds the agent that there is an unread message on the Notification page. These messages are permanently saved and sorted by the creation time in descending order.

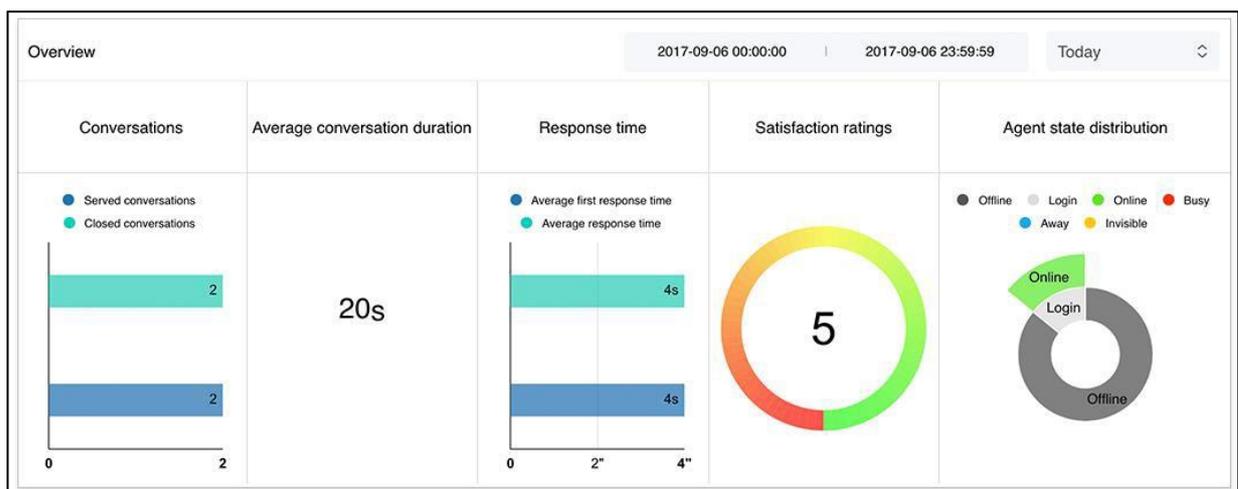


When you receive a system message related to a customer (for example, a conversation has been automatically closed due to inactivity), you can view the details of the customer.

Chat statistics

The "Chat statistics" page displays the key statistical data of current agent, and supports filtering by date.

Overview



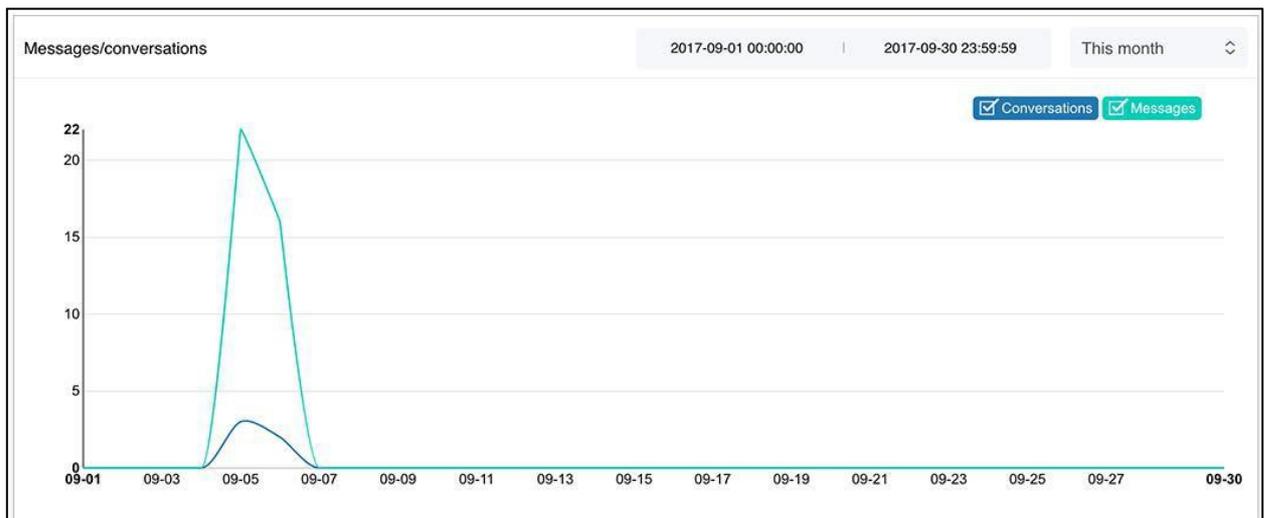
The statistical indicators are as follows:

- Served conversations: Number of incoming and callback conversations served by the agent, including closed and ongoing conversations.
- Closed conversations: Number of conversations closed by the agent.
- Average conversation duration: Average of the conversation duration served by the agent (Duration served/Closed conversations).
- Average first response time: Average of all the first response times of the agent.
- Average response time: Average of all response times of the agent.
- Satisfaction ratings: Average of the satisfaction ratings to the conversations that the agent served. If a conversation has been transferred, all agents who served the conversation share the satisfaction ratings to the conversation.
- Online status distribution: The agent's online time data, including online, busy, away, invisible, login, offline time and proportion.

Messages/Conversations

The Messages/Conversations graph shows the number of messages and conversations per day.

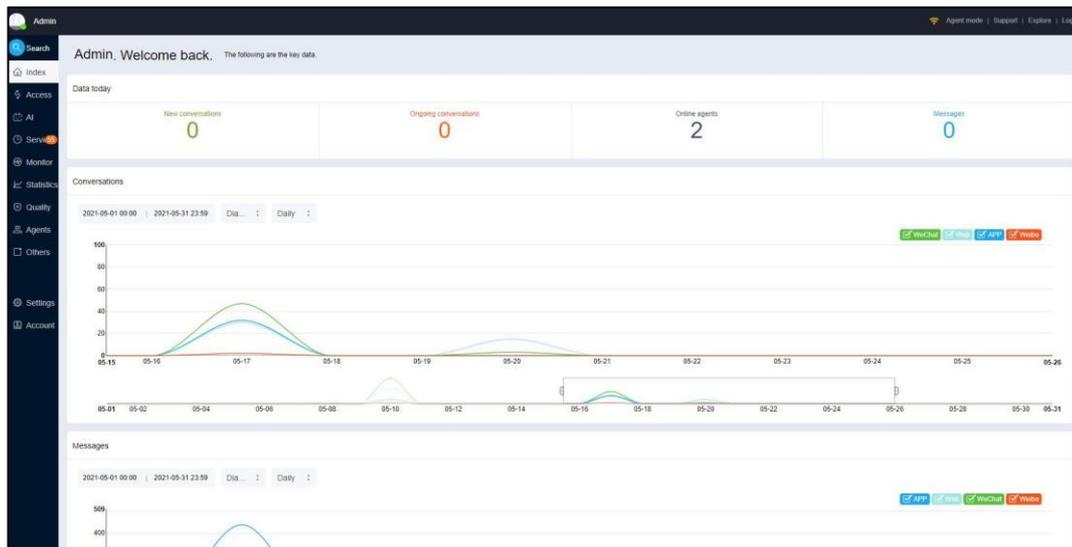
- Conversations: Number of conversations served by the agent.
- Messages: Number of messages sent by the agent, customer and system during the time when the agent served the conversations. For example, if agent A transfers a conversation to agent B. The messages sent before the transfer belongs to agent A; and the messages sent after the transfer belongs to agent B.



Admin Mode

Home page

The Home page shows the main data related to agents.



Data Today

New conversations: Number of conversations created from 00:00 to the current time, including incoming and callback conversations served by all agents.

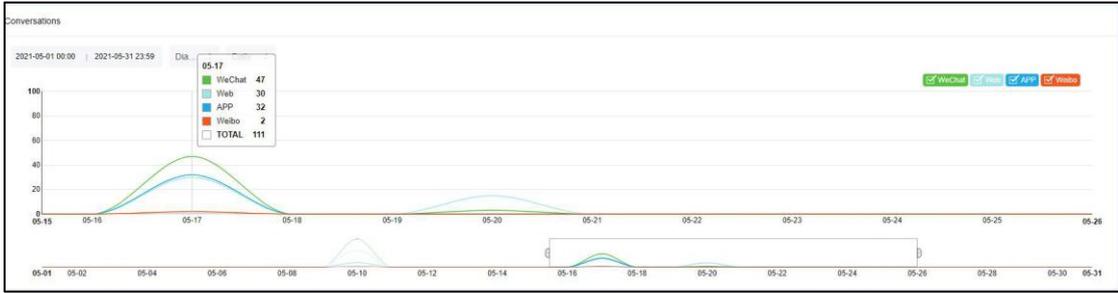
Ongoing conversations: Number of conversations that are currently served by all agents.

Online agents: Number of logged-in users (agents and admins), including those who are online, invisible, busy, and away.

Conversations

Trend of conversations, including incoming and callback conversations served by all agents.

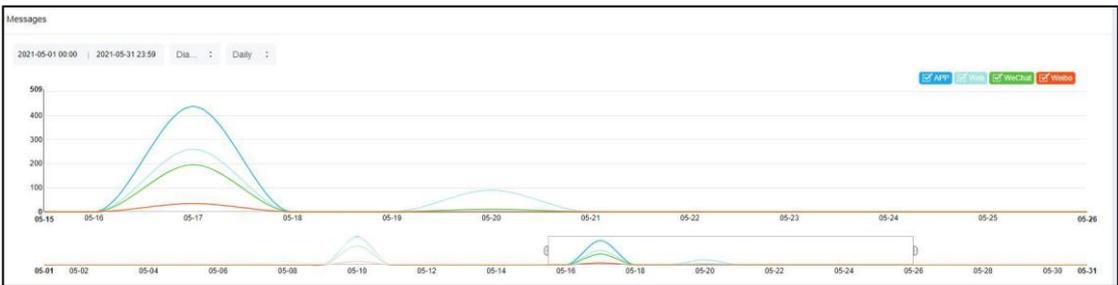
The following figure shows a histogram for daily conversations in four channels: App, Web, WeChat, and Weibo.



Messages

Trend of messages sent by customers, agents, and the system.

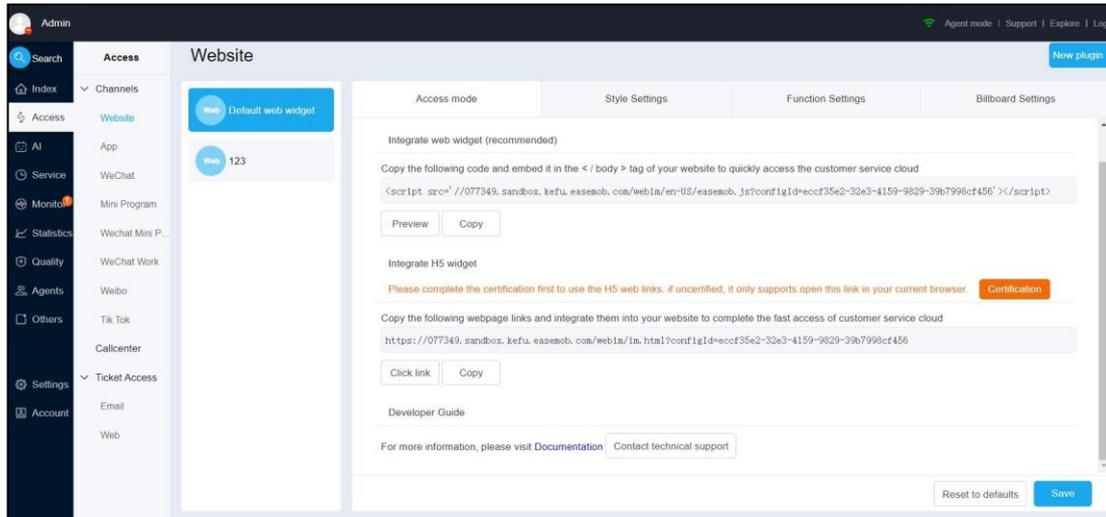
The graph can be changed based on the time range, time granularity (hourly, daily, weekly, or monthly), channel (app, web, WeChat, or Weibo). You can also choose to use different display graphics, such as diagram, area graph, histogram.



Access

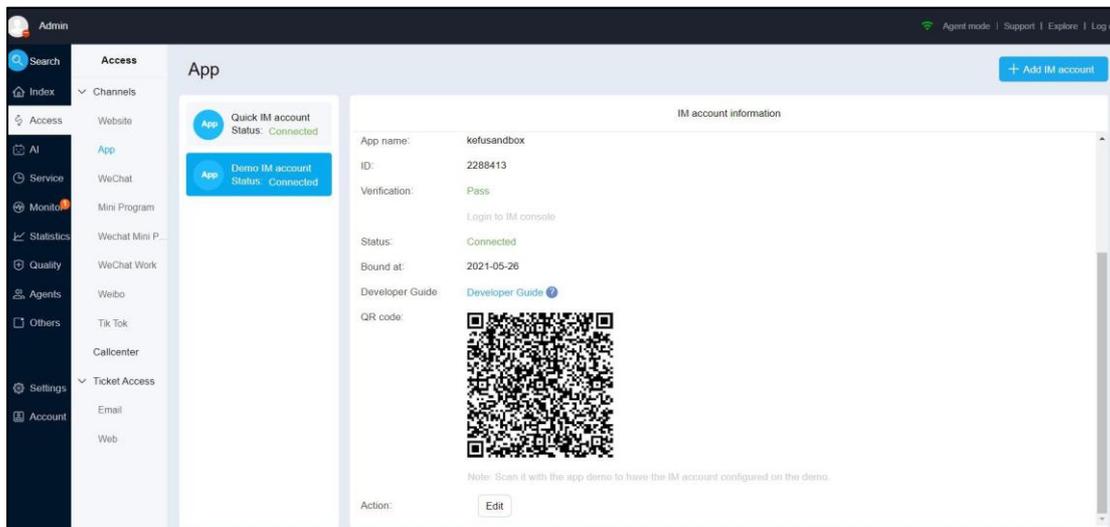
Web

To provide customer service to your web users, you can add a chat window or a H5 page to your website.



App

The IM account can be used as a messaging channel between app/web customers and the system. On the App page, you can manage the IM accounts, including adding, modifying, and deleting IM accounts.

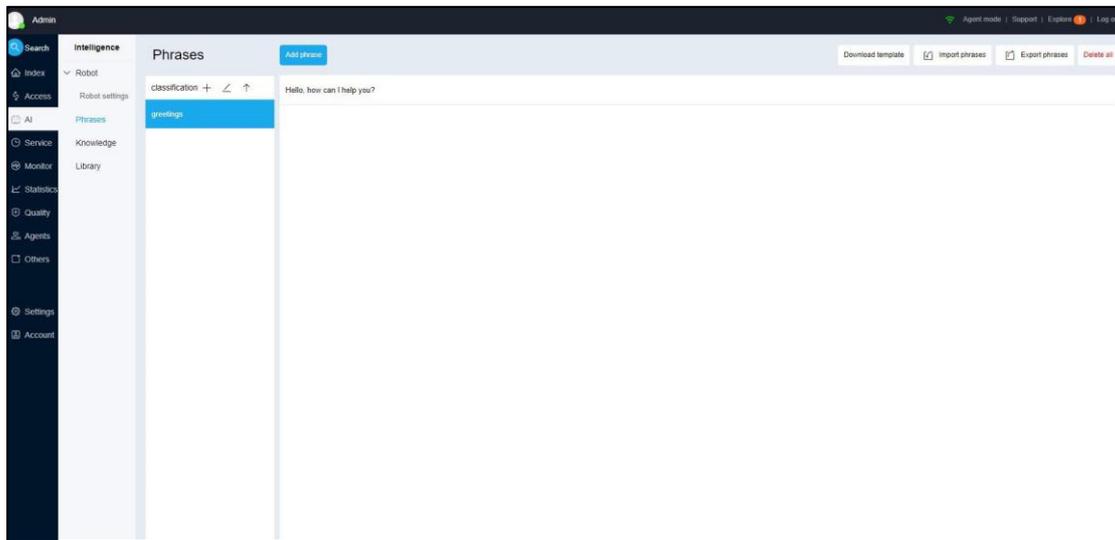


AI

Phrases

A phrase is a commonly used message that the agent sends to the customer. Public phrases are set by the admin for use by all agents.

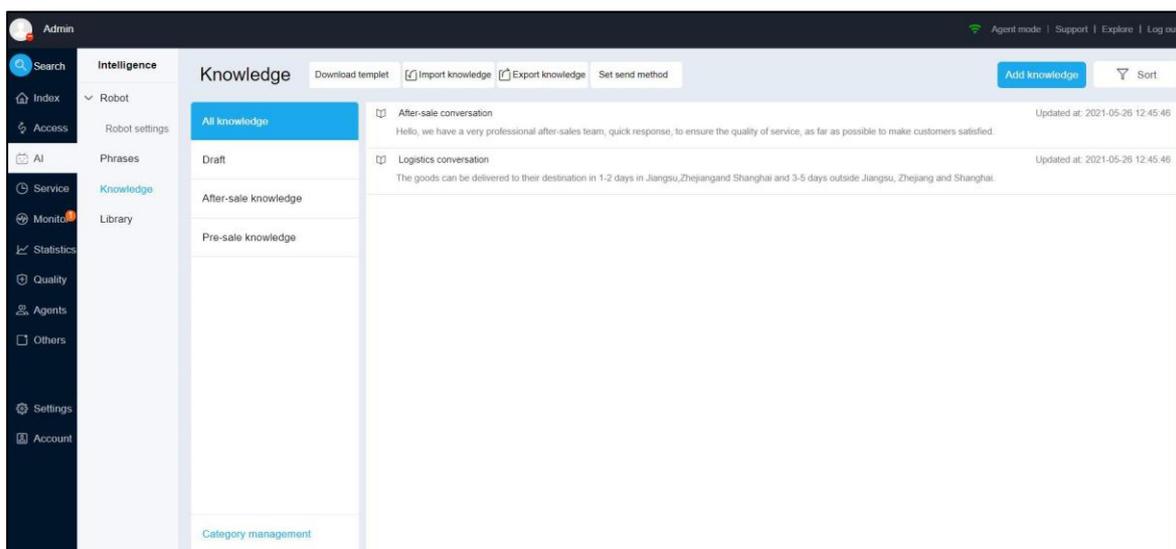
Go to “Admin Mode > AI > Phrases” to set public phrases. You can add multiple level 1 categories, multiple level 2 categories, and multiple phrases in each category.



Knowledge

“Knowledge” contains accumulated, summarized and precipitated experience, such as product introduction, function description, business process, etc. Each piece of knowledge consists of a title, knowledge content and attachments. The knowledge content can be text or graphic message, and support editing text format.

The knowledge in “Knowledge” is edited by the administrator, and the agent can view it in the “Conversation” and “Knowledge” pages.



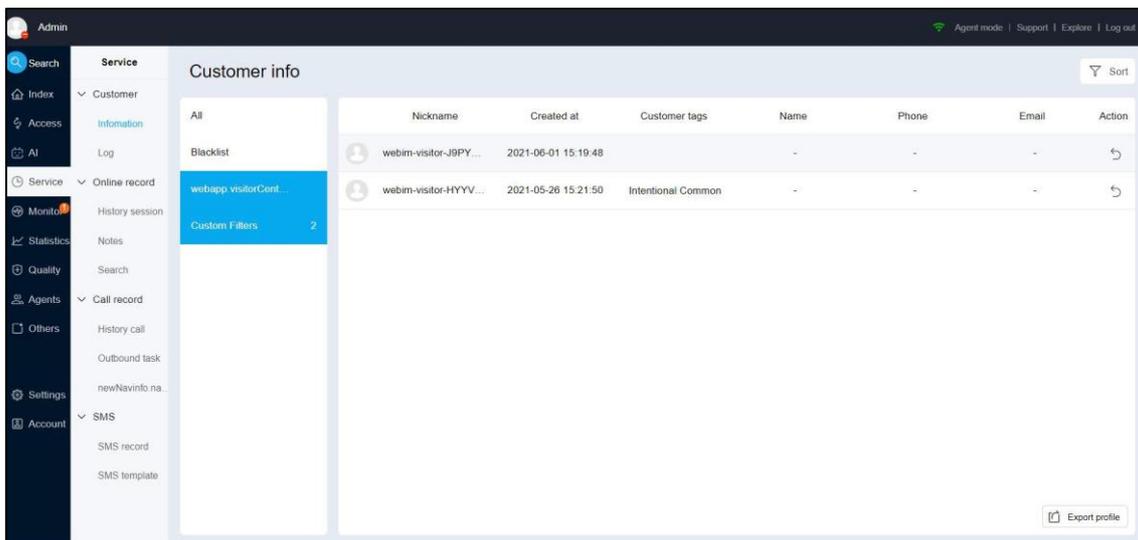
History

Customer

In the Admin Mode, the Customers page shows all the customers who are served in the system. Admins can view the customer profiles and manage the customers.

Information

The Customers page displays the customers created within this week by default. The customers can be filtered based on the time period, customer tag, customer name, and customer IDs. Additionally, the customer name and customer ID support fuzzy query.



Log

Admins can manage the blacklist by adding customers to the blacklist, viewing the blacklist, and removing customers from the blacklist. Enter the "Admin mode > History > Log" page, you can view the operation log of the blacklist, click the operation log record to display customer information, interaction details and blacklist operation details.

Log					
Operation time	Type	Operator	nickname	Reason	
2021-05-17 17:36:56	Add to blacklist	tb@easemob.com	1000001-162124209	blacklist reason	
2021-05-10 19:19:47	Add to blacklist	Admin	1000001-1620645682	blacklist reason	
2021-05-10 18:57:53	Add to blacklist	Admin	1000001-1620644267	blacklist reason	
2021-05-08 15:47:32	Remove from blacklist	tb@easemob.com	webim-visitor-RWk4E843VVTJEXRHYBCM		
2021-05-08 15:47:27	Add to blacklist	tb@easemob.com	webim-visitor-RWk4E843VVTJEXRHYBCM	111	
2021-05-08 15:47:13	Remove from blacklist	tb@easemob.com	1000001-1617017940		
2021-03-29 19:39:06	Add to blacklist	Admin	1000001-1617017940	blacklist reason	
2021-03-25 20:00:14	Add to blacklist	tb@easemob.com	fbff4b39-93df-441e-99a9-4c234150775	双方都	
2020-07-17 12:50:53	Add to blacklist	Admin	1000001-1594961448	blacklist reason	
2020-06-03 20:47:04	Add to blacklist	Admin	1000001-1591188417	blacklist reason	

Online Record

History session

In the Admin Mode, on the History page, admins can view all the closed conversations, messages, customer profiles, satisfaction ratings, and transfer records, and perform quick quality reviews.

The conversation list shows the customer name, agent name, start time (join or transfer time), conversation tag, transfer status, channel, and channel account. The conversations can be filters based on these information.

Customer	Last customer service	Access time	Conversation types	Channel	Action
webim-visitor-J9PYMGWMQR...	admin	2021-06-01 15:19:55	Inbound	Web	↶ ↷
webim-visitor-HYYV9G9BYB4...	admin	2021-05-31 15:50:09	Inbound	Web	↶ ↷
webim-visitor-CVYPVITCZFP...	23	2021-05-31 15:14:16	Inbound	Web	↶ ↷

Notes

When customers have been waiting for a long time or agents are too busy to reply to them in time, the customers can choose to leave a note instead. On web widgets, if the robot is offline at non-work hours, the widgets display the note form by default. Customers' notes are different from conversations and do not go to the Queue.

No.	Created by	Created at	Updated at	Channel	Assign to	Status
14091	xxx-ceshi	2021-05-25 18:29:00	2021-05-25 18:29:00	Web	Unassigned	未处理
14087	b@easemob.com	2021-05-17 17:38:56	2021-05-17 17:38:56	APP	Unassigned	未处理
16083	b@easemob.com	2021-05-17 17:38:55	2021-05-17 17:38:55	APP	Unassigned	未处理
16082	b@easemob.com	2021-05-17 17:38:55	2021-05-17 17:38:55	APP	b@easemob.com	未处理
16081	b@easemob.com	2021-05-17 17:38:54	2021-05-17 17:38:55	APP	b@easemob.com	未处理
16080	b@easemob.com	2021-05-17 17:38:53	2021-05-17 17:38:53	APP	Unassigned	未处理
16079	b@easemob.com	2021-05-17 17:38:53	2021-05-17 17:38:53	APP	Unassigned	未处理
14086	b@easemob.com	2021-05-17 17:38:53	2021-05-17 17:38:53	APP	Unassigned	未处理
16072	Admin	2021-05-10 19:22:01	2021-05-10 19:22:01	APP	Unassigned	未处理
14074	Admin	2021-05-10 19:22:01	2021-05-10 19:22:01	APP	Unassigned	未处理
14073	Admin	2021-05-10 19:22:01	2021-05-10 19:22:01	APP	Admin	未处理
14072	Admin	2021-05-10 19:22:00	2021-05-10 19:22:00	APP	Admin	未处理
14071	Admin	2021-05-10 19:22:00	2021-05-10 19:22:00	APP	Unassigned	未处理
16071	Admin	2021-05-10 19:21:59	2021-05-10 19:21:59	APP	Unassigned	未处理
14070	Admin	2021-05-10 19:21:59	2021-05-10 19:21:59	APP	Unassigned	未处理
16069	Admin	2021-05-10 19:00:07	2021-05-10 19:00:07	APP	Unassigned	未处理

Search

On the Search page, you can search for all conversations and messages based on keywords. The search results include the customer/agent name and the message delivery time. You can also export the search result.

By default, the search result only includes conversations created within the last 30 days.

Customer ID	Agent	Message
webim-visitor-J8PYMGWMMQRR492RFGQ8E	Admin	Hi there. How can I help you?
webim-visitor-HYYV8C8BYB4VQTPEF8	Admin	Hi there. How can I help you?
webim-visitor-CVYPVTTTC2FPRF2M329GY23	Admin	Hi there. How can I help you?

Monitor

Operational

Alarm records

On the alarm records page, it records the alarm related to the agent's operation of the day. At present, it supports setting the alarm when the agent fails to reply within the preset time period, and sends the alarm when the keyword in the agent message is matched.

Event name	Alarm level	Date & time	Keyword	Customer	状态	Action
会话超时未回复	Level 1 alarm	2021-05-25 15:53:54	culkh	yyx-cesh	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-25 18:51:45	culkh	yyx-cesh	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-25 18:42:20	culkh	yyx-cesh	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-20 17:27:54	fd	1000001-10795	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-20 17:27:51	fd	1000001-31832	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-20 17:27:49	fd	1000001-39887	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-20 17:27:46	fd	1000001-69230	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-20 17:27:42	fd	1000001-12429	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-17 17:45:41	b@easemob.com	1000001-57372	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-17 17:45:38	b@easemob.com	1000001-24737	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-17 17:45:34	b@easemob.com	1000001-27777	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-17 17:45:19	b@easemob.com	1000001-59730	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-17 17:45:13	b@easemob.com	1000001-60165	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-17 17:45:07	b@easemob.com	1000001-60744	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-17 17:45:04	b@easemob.com	1000001-34916	Unprocessed	<input type="checkbox"/>
会话超时未回复	Level 1 alarm	2021-05-17 17:45:01	b@easemob.com	1000001-79140	Unprocessed	<input type="checkbox"/>

Current service

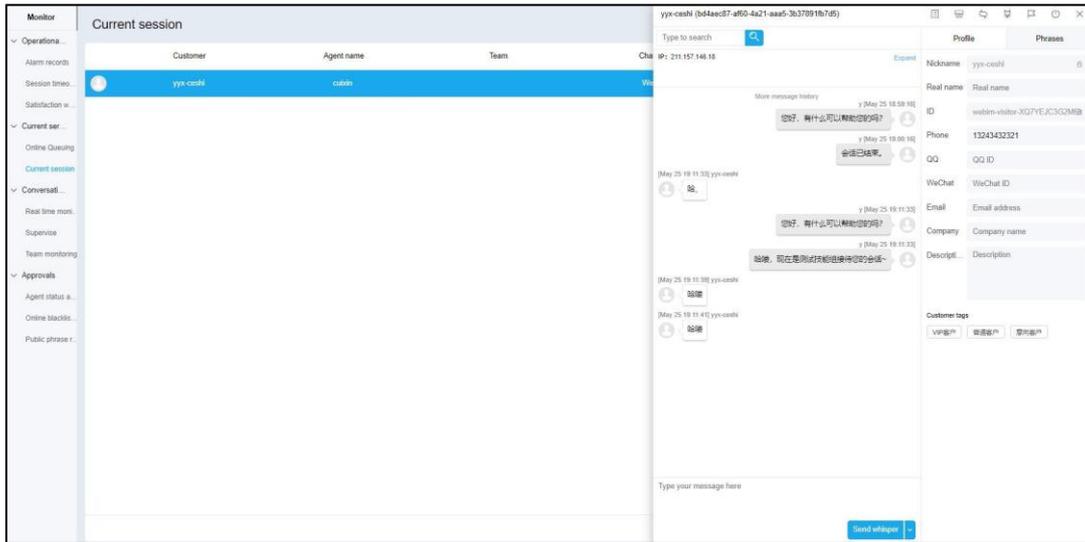
Online Queuing

The Queue panel displays the conversations that are currently queued for pick-up.

Customer	Created at	等待时长	Team	Agent nickname	Channel	Channel account	VIP	Customer tags	Action
webm-visitor-EVEY...	2021-05-20 20:28:42	99秒	测试		Web	快速搭建的关联	No		→ ↺ ⌂

Current session

Admins can monitor all ongoing conversations, including those served by agents and the robot. The conversations can be filtered based on the time period, agent name, customer name, and customer tag. By default, all ongoing conversations are displayed.



Approvals

It supports the agent to submit applications, which are approved by the administrator, so as to enhance the management ability of the agents and strengthen the team cooperation. The approvals includes agent status approval, blacklist approval and common language approval.

Agent status approval

When the administrator turns on the "Agent's status change needs approval" switch, the general agents will switch the online status from "online" to busy, away and invisible status, which needs the administrator's approval; when the administrator turns off this switch, ordinary agents can switch the online status at will.

This switch does not affect the administrator's switching online status.

Agents		Agent status approval						
		Pending	Request No.	Requested by	Request time	Type	Reason	Status
		Approved	257119	yyx	2021-05-26 11:22	Agent status request	have a rest	Approved
		Rejected	257117	yyx	2021-05-26 10:57	Agent status request	上个假期	Approved

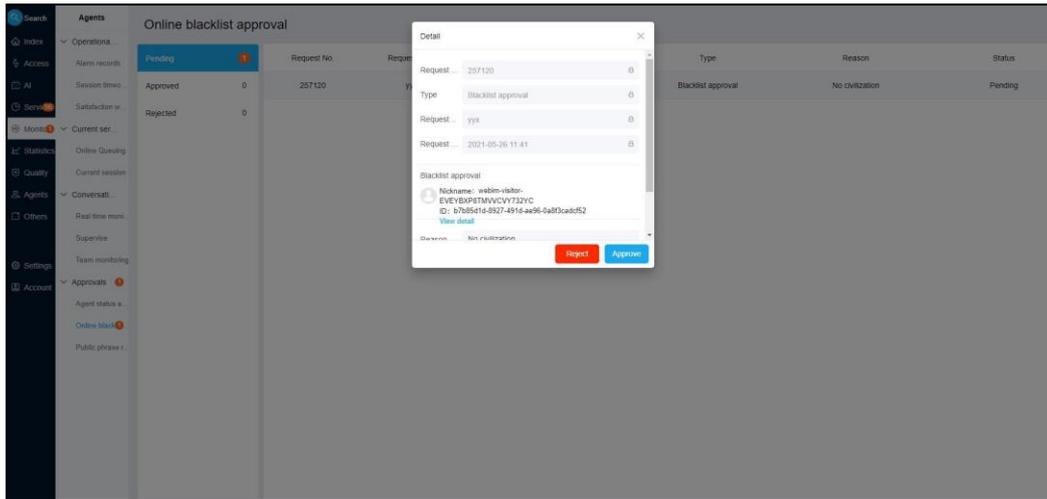
Online blacklist approval

When adding agents to the blacklist needs to be approved, the administrator can enter the "Admin mode > Settings > Function settings" page to turn on the "Adding agents to blacklist requires approval" switch. When the administrator turns off this switch, ordinary agent can agents to the blacklist at will. Administrators adding agents to the blacklist are not affected by this switch.

After the agent submits the request, the system will prompt the administrator in the upper right corner of the page where the administrator is, so as to facilitate the administrator to process such requests quickly.

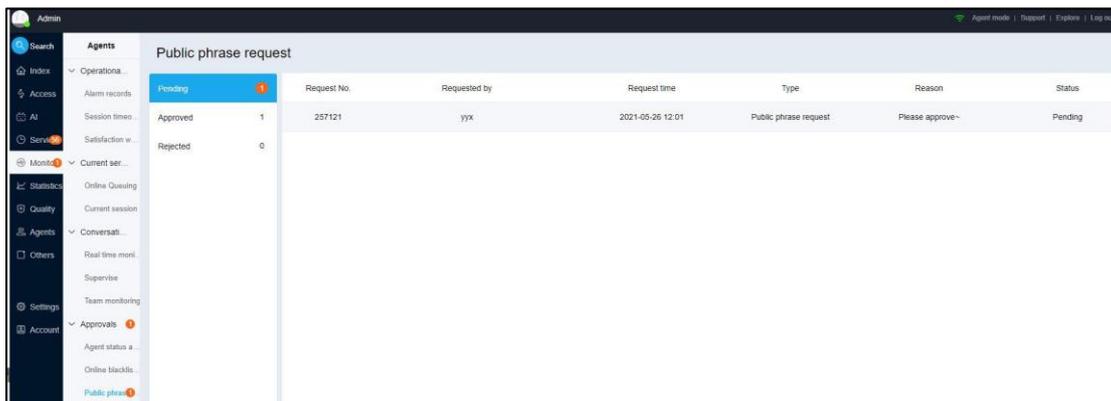
After the pop-up window disappears, the administrator can still enter the "Admin mode > Monitor>Approvals" page to view or process blacklist requests submitted by agents.

Agents		Online blacklist approval							
		Pending	Request No.	Requested by	Request time	Type	Reason	Status	
		Approved	0	257120	yyx	2021-05-26 11:41	Blacklist approval	No civilization	Pending
		Rejected	0						



Public phrase request

It supports agents to submit personal common phrase to public phrase for approval by administrator. After approval, the common phrase will be automatically added to the public phrase for all agent.



Statistics

Workload

The workload report includes the overview, trend of conversations and messages, conversation distribution (by conversation labels), conversation distribution (by messages), conversation distribution (by duration), agent workload, and team workload. You can filter these data and export the report based on the filtering options (including the time period, conversation tag, channel, channel account, agent, team, and conversation type). All query results are displayed in real time.

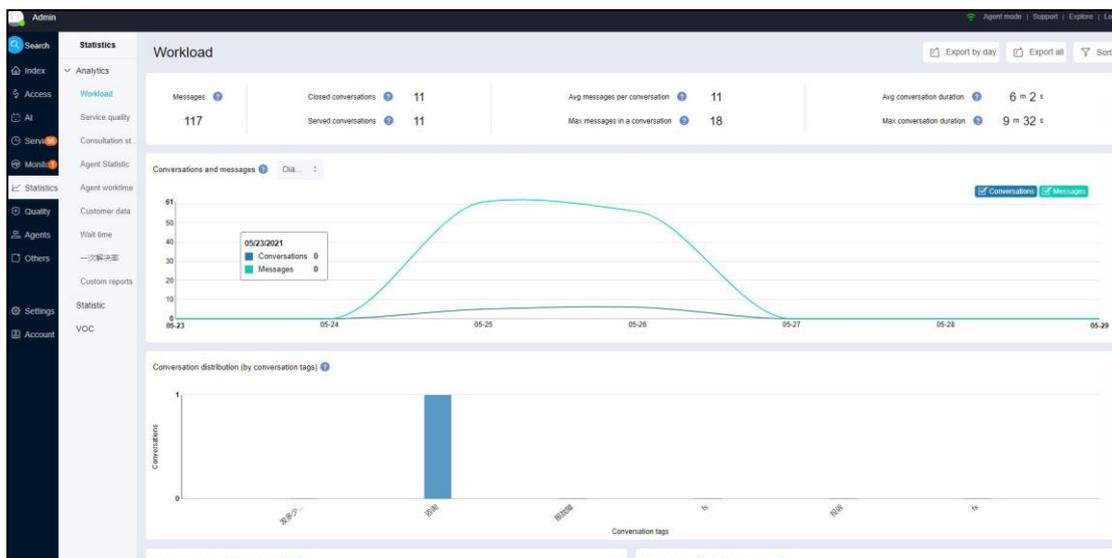
Metrics in the overview and graphics are system metrics; those in agent/team workload tables

are for each agent/team.

To view the workload report, go to “Admin Mode>Statistics > Analytics > Workload”. By default, the Workload page displays the workload completed by all agents this week.

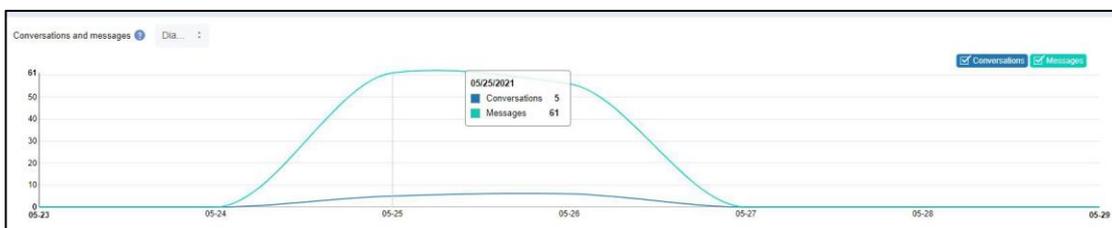
Overview

The workload overview includes the system metrics: the number of messages, the number of end sessions, the number of subsequent sessions, the average number of single-session messages, the maximum number of single-session messages, the duration of the session, and the maximum duration of the session.



Conversations and Messages

Display the distribution of conversations started every day and the messages in these conversations in a diagram or histogram. The number of conversations is consistent with the History page.



Conversation Distribution (by Conversation Tags)

Display the distribution of conversations based on the conversation tags. When filtering the workload data:

If you select All Tags, the number of conversations corresponding to each root node of the conversation tags is displayed (the number of conversations of a root node contains the total number of conversations under all its leaf nodes).

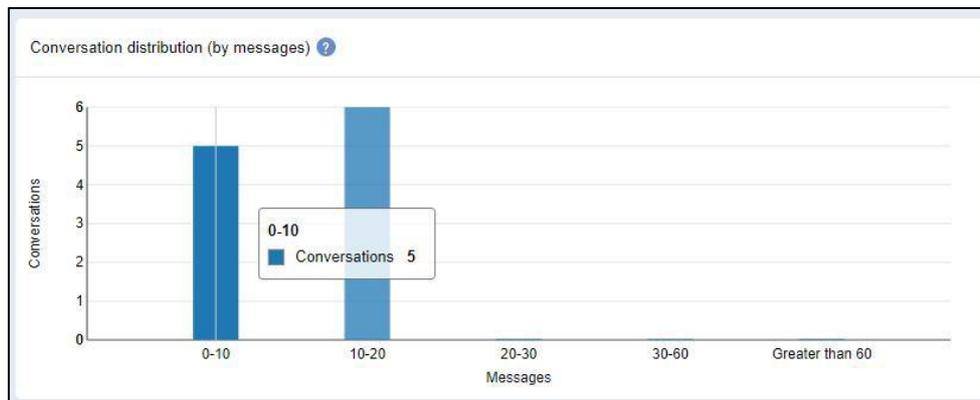
If you select Specified Tags, you can select any conversation tags. The number of conversations corresponding to the selected tags will be displayed (if you select a root node or branch node, the number of conversations contains the total number of conversations under all its leaf nodes).

If you select No Tags, no data is displayed.



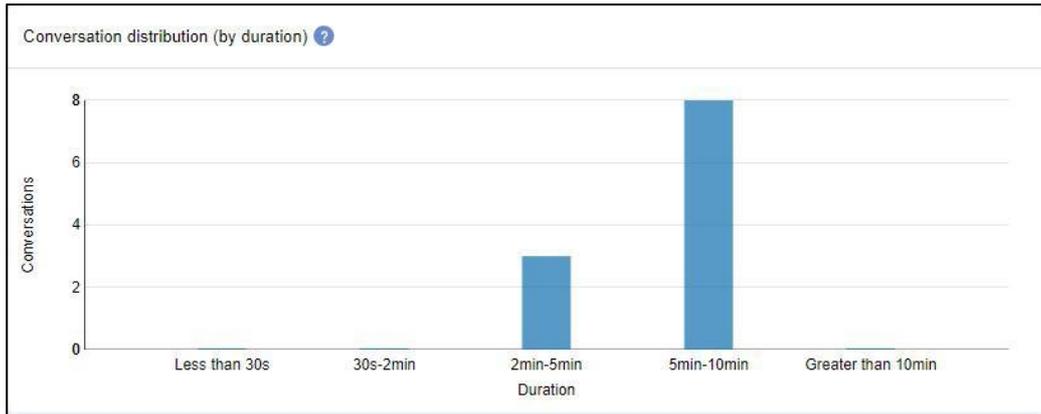
Conversation Distribution (by Messages)

Display the distribution of conversations based on the number of messages.



Conversation Distribution (by Duration)

Display the distribution of conversations based on the conversation duration.



Agent Workload

On the Workload page, you can directly view the workload of each agent.

Agent n...	Served conversati...	Served times	Joined/in	Out/closed	Agent/customer/system	Duration	Messages
fd	1	1	0/1	1/0	0/0/2	Avg 101/ Max 101	Avg 2/ Max 2
cuxin	10	10	5/5	0/10	19/20/42	Avg 341/ Max 572	Avg 8/ Max 18
yyx	3	3	2/1	2/1	1/2/11	Avg 118/ Max 258	Avg 5/ Max 6
liuhs	4	4	4/0	4/0	0/4/16	Avg 30/ Max 58	Avg 5/ Max 5
perftest3	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
perftest15	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
perftest41	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
perftest20	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
perftest62	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0

Team Workload

To view the workload of each team, click Sort on the Workload page and select Team. The metrics for teams are similar to those for agents.

Team	Served conversati...	Served times	Joined/in	Out/closed	Agent/customer/system	Duration	Messages
测试	11	11	11/0	6/5	13/24/55	Avg 194/ Max 572	Avg 8/ Max 18
未分组	6	7	0/7	1/6	7/2/16	Avg 265/ Max 406	Avg 4/ Max 7
100000131832A	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
perfgroup6	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
e0af3604-9caf-4ee1...	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
perfgroup7	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
100000133384A	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
perfgroup10	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
100000139887A	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
perfgroup11	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
100000169230A	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
100000112429A	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
perfgroup8	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
perfgroup9	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0
100000147196A	0	0	0/0	0/0	0/0/0	Avg 0/ Max 0	Avg 0/ Max 0

Export service quality reports

On the Service quality page, you can click "Export all" button and export the service quality data to the local area in the form of Excel table according to the screening conditions, which is convenient for data accumulation and analysis.

Service quality

The service quality report includes the overview, satisfaction ratings, review ratings, valid conversations, conversation distribution (by first response time), conversation distribution (by average response time), agent service quality, and team service quality. You can filter these data and export the report based on the filtering options (including the time period, conversation tag, channel, channel account, agent, and team). All query results are displayed in real time.

Metrics in the overview and graphics are system metrics; those in agent/team service quality tables are for each agent/team.

To view the service quality report, go to “Admin Mode > Analytics > Service Quality”. By default, the Service Quality page displays the service quality of all agents this week.

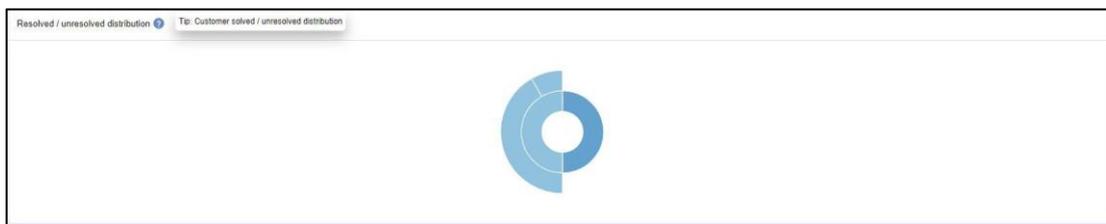
Overview

The Service Quality overview includes the system metrics: satisfaction ratings, average first response time, maximum first response time, average response time, and maximum response time.



Resolved/unresolved distribution

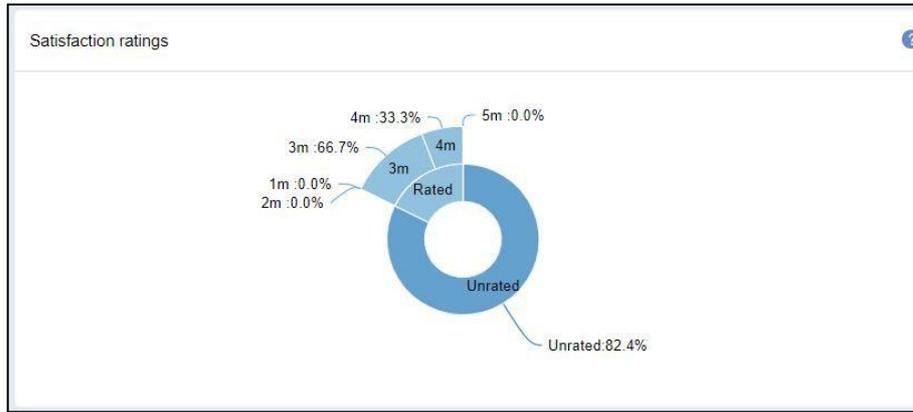
Resolved/unresolved distribution is the customers' solved/unresolved distribution rating distribution for agent service.



Satisfaction ratings

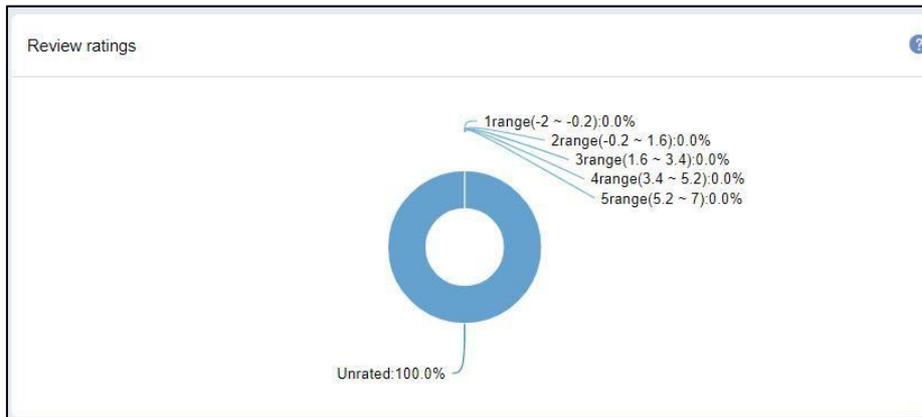
Display the distribution of satisfaction ratings in closed conversations.

- Unrated: Percentage of unrated conversations among all closed conversations.
- 1m, 2m, 3m, 4m, 5m: Percentage of conversations that are rated 1 star, 2 stars, 3 stars, 4 stars, and 5 stars among all closed conversations.



Review rating

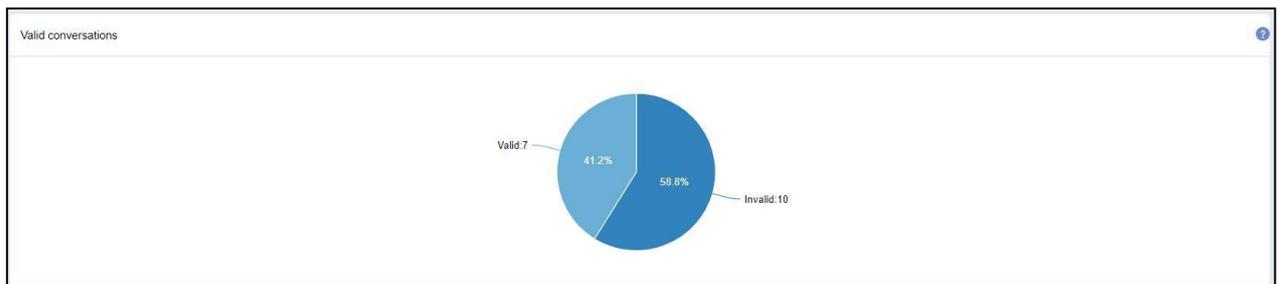
Display the distribution of review ratings in closed conversations. * Unrated: Percentage of unrated conversations among all closed conversations. * 1, 2, 3, 4, 5: Percentage of conversations that are rated the scores 1, 2, 3, 4, and 5 among all closed conversations.



Valid Conversations

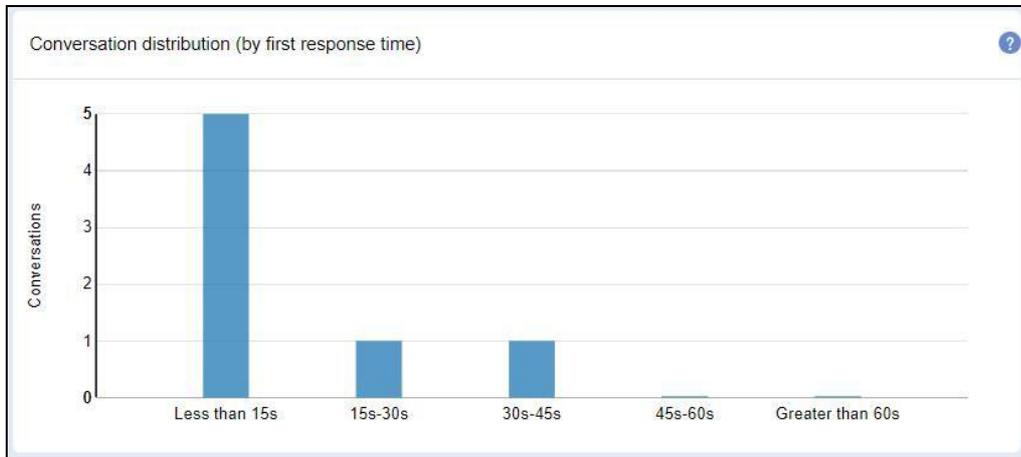
Display the percentage of valid conversations among all closed conversations.

- Valid conversations: A valid conversation contains at least one customer message and one agent message.
- Invalid conversations: An invalid conversation does not contain any customer message or any agent message.



Conversation distribution (by first response time)

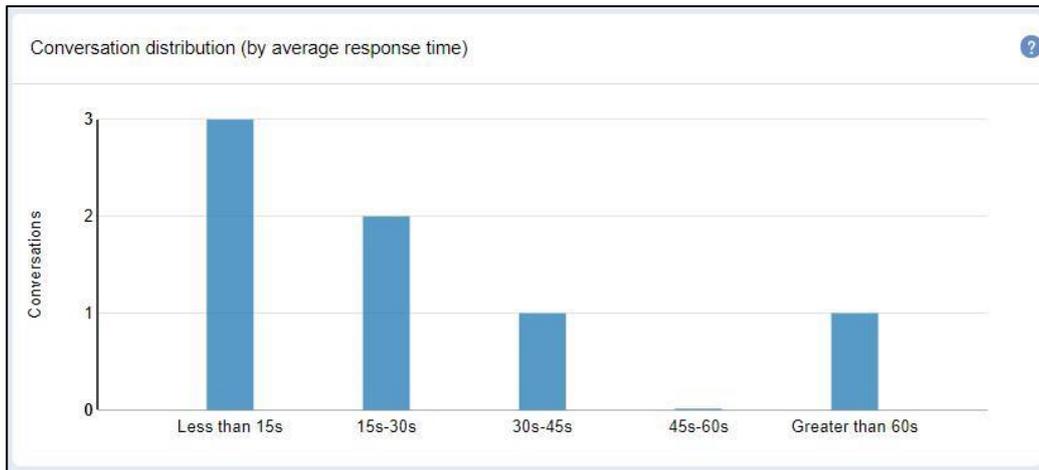
Display the distribution of conversations based on the first response time. First response time of a conversation = Time of the agent's first message - Start time of the conversation.



Conversation distribution (by response time)

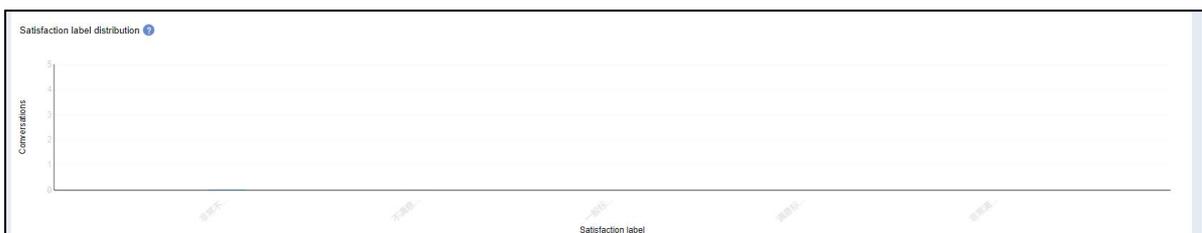
Display the distribution of conversations based on the average response time.

Average response time of a conversation: Total response time of the conversation/Number of times.



Satisfaction label distribution

At the end of the session, satisfaction label distribution is the customers' satisfaction label distribution for agent service.



Agents' quality details

On the Service Quality page, you can directly view the service quality of each agent.

Agent	Real Name	Valid conversations	Invalid conversati...	Average first respons...	Average response ...	Satisfaction (involv...	Evaluati...	Review (involvement)
feltonlei2	feltonlei2	0	5	Avg 0/Max 0	Avg 0/Max 0	2(16.67%) ★	100.00% ★	0(0.00%) ★
吴迪	吴迪	0	4	Avg 0/Max 0	Avg 0/Max 0	0(0.00%) ★	0.00% ★	0(0.00%) ★
yangzhe	yangzhe	1	6	Avg 13/Max 13	Avg 1815/Max 1815	3(14.29%) ★	50.00% ★	0(0.00%) ★
陶静姓名	陶静昵称	0	2	Avg 0/Max 0	Avg 0/Max 0	3(50.00%) ★	100.00% ★	0(0.00%) ★
leoli大帅哥	Leoli	2	3	Avg 6/Max 9	Avg 10/Max 16	4(40.00%) ★	50.00% ★	0(0.00%) ★
吴迪02	吴迪02	0	3	Avg 0/Max 0	Avg 0/Max 0	0(0.00%) ★	0.00% ★	0(0.00%) ★
Z02KXKE0155	Z02KXKE0155	0	0	Avg 0/Max 0	Avg 0/Max 0	0(0.00%) ★	0.00% ★	0(0.00%) ★
perftest122	perftest122	0	0	Avg 0/Max 0	Avg 0/Max 0	0(0.00%) ★	0.00% ★	0(0.00%) ★
perftest3530	perftest3530	0	0	Avg 0/Max 0	Avg 0/Max 0	0(0.00%) ★	0.00% ★	0(0.00%) ★
杨超宇4	杨超宇4	0	0	Avg 0/Max 0	Avg 0/Max 0	0(0.00%) ★	0.00% ★	0(0.00%) ★
perftest1810	perftest1810	0	0	Avg 0/Max 0	Avg 0/Max 0	0(0.00%) ★	0.00% ★	0(0.00%) ★

Export service quality reports

On the service quality page, you can click "Export all" button and export the service quality data to the local area in the form of Excel table according to the screening conditions, which is convenient for data accumulation and analysis.

Agent Worktime

On the Agent Worktime page, you can view the agents' online and offline durations, filter the data based on the date and time and agent name, and export the agent worktime report. The sum of the online and offline duration is equal to the length of the selected time period.

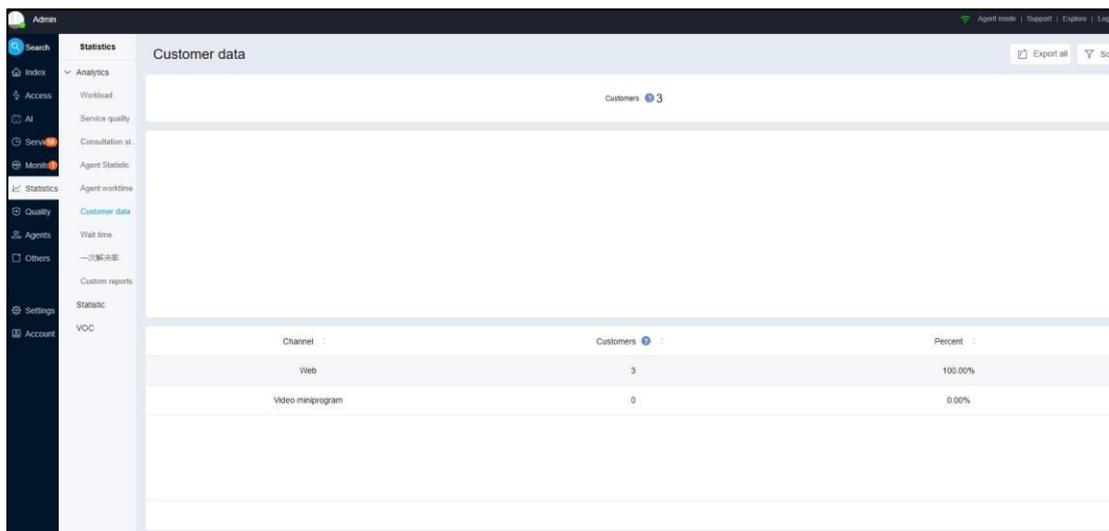
To view the login detail of an agent, including the login IP address, just click on the agent.

Agent	First Login	Last offline	Login	Online	Idle time Proportion	Busy
tom	2021-05-26 12:33	2021-05-26 16:44	3h 25m 55s	3h 25m 55s	100.00%	0
ftr	2021-05-25 15:44	2021-05-25 21:14	11h 57m 27s	11h 57m 27s	100.00%	0
yyx	2021-05-25 20:38	2021-05-25 21:14	6h 56m 33s	6h 36m 55s	95.29%	0h 19m 38s
cuxin	2021-05-25 15:58	2021-05-25 13:14	13h 23m 57s	13h 23m 57s	100.00%	0
b@easemob.com	2021-05-24 10:13	2021-05-25 19:14	4h 45m 4s	4h 45m 4s	100.00%	0
lluis	2021-05-26 10:12		6h 47m 23s	6h 47m 23s	100.00%	0
ty	2021-05-26 12:25	2021-05-26 16:44	3h 33m 52s	3h 33m 52s	100.00%	0
VOC			0	0	0.00%	0

Customer Data

The customer data report contains the number of individual customers, the trend of individual customers, the number of individual customers in different channels, and the percentage. The customer data can be filtered based on the time period, channel, channel account, customer tags, and number of visits. All query results are displayed in real time.

To view the customer data report, go to “Admin Mode > Statistics > Customer Data”. By default, the Customer Data page displays the number of new customers from all channels this week.



Customer data

Display the number of individual customers. The number of individual customers is updated in real time.

Trend of Customers

Display the trend of daily individual customers from different channels. If the channel account, customer tag, or number of visits is selected, the total number of individual customers is displayed. The following figure shows an example of the trend of individual customers from different channels.

Customer Data

The number of individual customers is displayed based on the channel, channel account, customer tag, and the number of visits.

Filter Customer Data

To filter customer data, click Sort on the Customer Data page, and select the time period and the display items (by channel, by channel account, by customer tag, by visiting times).

Export the Customer Data Report

On the Customer Data page, click Export All to export a customer data report in a CSV file. The CSV file can be used for data accumulation and analysis.

Wait Time

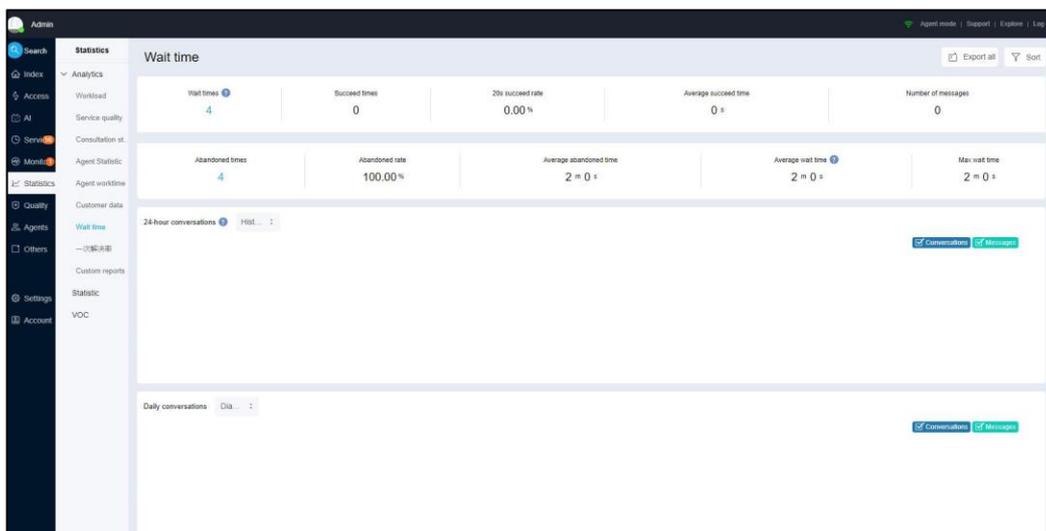
The wait time report includes the overview, 24-hour conversations, 24-hour queuing trend, daily queuing trend, and wait times distribution. You can quickly find out the time period when there are a

large number of conversations and messages and long wait time and make appropriate arrangements for your team. You can query and export reports based on the following filtering options: time period (conversation creation time), conversation tag, channel, channel account, wait time exceeds x seconds, and customer tag. All query results are displayed in real time.

To view the wait time report, go to “Admin Mode > Statistics>Analytics > Wait Time”. By default, the Wait Time page displays the queuing data for all conversations that are created this week and have a wait time of more than 60 seconds.

Overview

The wait time overview includes the total number of wait times and the average wait time for the filtered conversations. The wait time of a conversation is the time that the conversation spends in the Queue.



24-Hour Conversations

Display the number of new conversations created within each hour (eg: 0:00:00-0:59:59) and the number of messages in these conversations in a diagram or histogram. Queuing conversations and their messages are included.

Daily Conversations

Display the number of new conversations created each day (eg: 0:00:00-23:59:59) and the number of messages in these conversations in a diagram or histogram. Queuing conversations and their messages are included.

24-Hour Queuing

Display the queuing status of the conversations in every hour (eg: 0:00:00-00:59:59). The queuing status includes the wait times, average wait times, average wait time and maximum wait

time.

Wait Times Distribution (by Conversation Tags)

Display the wait times distribution based on the conversation tags. You can find out the type of conversations that enter the Queue most frequently.

Filter Wait Time Data

To filter wait time data, click Sort on the Wait Time page, and select the time period, conversation tag, channel, channel account, wait time exceeds x seconds, and customer tag.

Export the Wait Time Report

On the Wait Time page, click Export All to export a wait time report in a CSV file. The CSV file can be used for data accumulation and analysis.

Review

Basic review

On the Basic Review page, the admins can review historical conversations and agents' performances. The review results provides a basis for improving service quality. The conversation list shows the first response time, conversation duration, and average response time of each agent, and the satisfaction ratings of each conversation.

Go to “Admin Mode > Quality > Review >Basic review” to view the conversations, filter conversations for quality review, rate the performance of the agent, and export review reports.

The screenshot shows a web application interface for 'Basic review'. It features a sidebar with navigation options like Search, Index, Access, AI, Service, Monitor, Statistics, Quality, Agents, Others, Settings, and Account. The main content area displays a table with columns: Agent, Customer, Conversation ID, Created at, First response time, Conversation d..., Average response time, and Maximum re... The table contains four rows of data. At the bottom, it shows '4 results' and an 'Export' button.

Agent	Customer	Conversation ID	Created at	First response time	Conversation d...	Average response time	Maximum re...
admin	webim-visitor-J...	f5a5a7b1-2910-...	2021-06-01 15:19	0	11097	0	0
admin	webim-visitor-H...	f622f782-d24e-...	2021-05-31 15:45	0	95690	0	0
23	webim-visitor-C...	91cdd6ba-8dc3-...	2021-05-27 11:12	0	17	0	0
admin	webim-visitor-C...	91cdd6ba-8dc3-...	2021-05-27 11:12	0	1793	0	0

Rate Agents' Performance

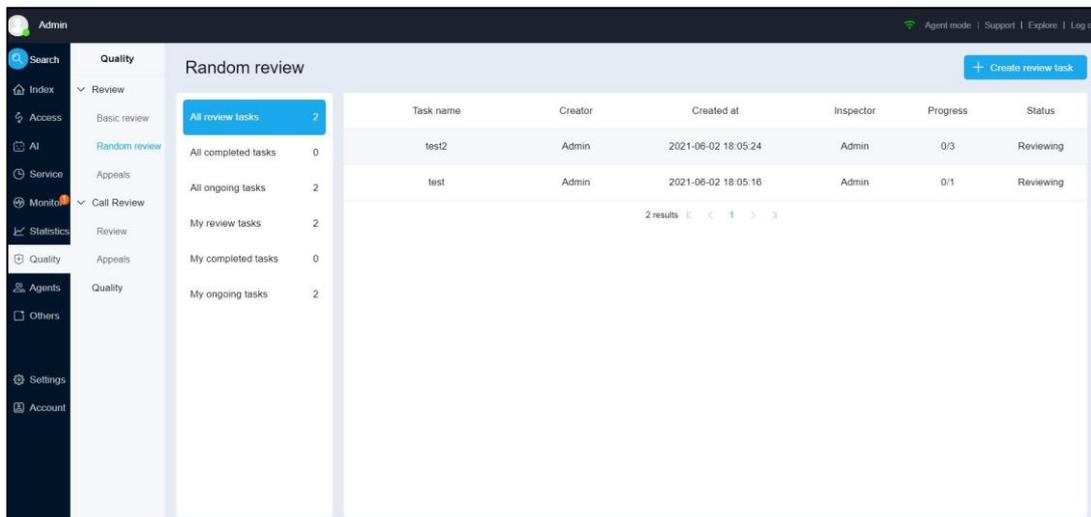
To rate an agent's performance: - Click a conversation to enter the detail page. - View the messages in the conversation and the metrics. - Go to the Quality Review tab, rate the agent's

performance and fill in the remarks.

The metrics include the first response time, conversation duration, average response time, maximum response time, excessive response times, and satisfaction ratings.

Random review

Random review, adopt the method of systematic random sampling of quality review samples to manage the quality review process, avoid cheating in quality review, and make the results more fair and just.

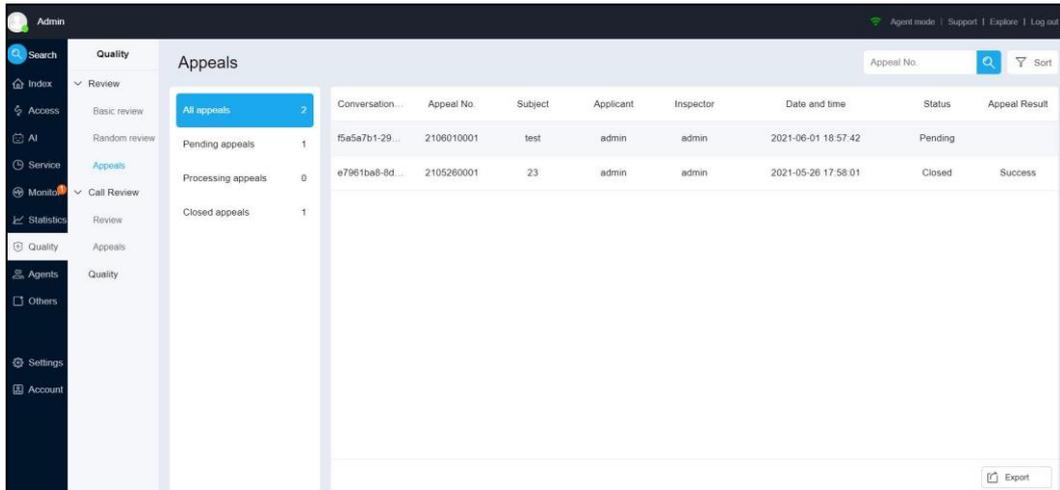


Appeals

After the agent appeals the quality inspection results, the administrator and the quality inspector can view the details of the quality inspection appeal of the agent, and handle the appeal. Only the original quality inspector can modify the quality inspection score of the appeal session.

Inquiry appeals

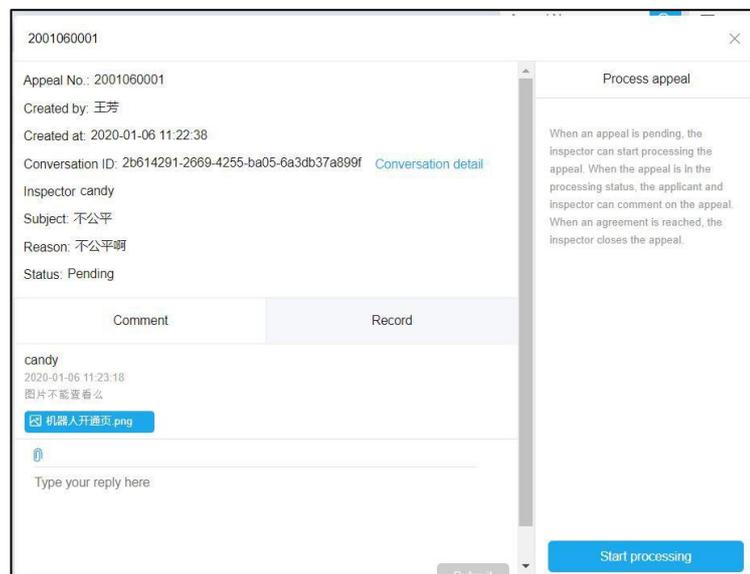
Enter the "Admin mode > Quality > Review > Appeals" page to view all the quality review appeals that pending, processing and closed. It supports searching for the appeals according to the appeal No., and supports the screening of appeals according to the time period.



Processing appeals

In the appeals list, you can click any appeal to view the details of the appeal, including creator, conversation ID, subject, reason etc.

- Click the "Start processing" button in the lower right corner of the appeal details to start processing the appeal. Then you can click the "Conversations details" button to enter the conversation details page to modify the quality inspection score.
- In the comment area, enter the comments to comment on the appeal. The comments are visible to the agent who initiated the appeal.



After handling the appeal, click the "Close appeal" button in the lower right corner of the appeal details to change the appeal status to “closed”.

Agent Management

Agents

The agent list shows all users (admins and agents). You can search for a user, sort the users by the capacity or role. Users have three roles: admin, agent, and custom role. The permissions of the custom role can be edited. On the Agent page, you can add an agent, edit an agent's profile, and delete an agent.

Add an Agent

To add an agent, click Add Agent, fill in the agent information, and click Save.

Search for an Agent

To search for an agent, enter the nickname, email address, real name, phone number, or employee ID and click the Search button. Once the search is complete, click the cross button (x) in the search box to cancel the search. You can also sort the order of the agents via the capacity or role.

Edit Agent Profile

You can modify the basic information (nickname, email address, password, real name, phone number and employee ID), capacity, and role. To edit an agent's profile, click the Edit button, modify the agent information, and click Save.

When you change an agent's role to Admin, the system will send a notification to the agent. When the user logs in to the system again, he will become an admin and have the corresponding permissions.

When you change an admin's role to an agent, the system will send a notification to the user. When the user logs in to the system again, he will become an agent and have the corresponding permissions.

Enable Agent Accounts

Admins can enable or disable the accounts of other admins and agents. The maximum number of enabled accounts under one tenant is licensed. When there is a change to the agents in your company, you can quickly disable an agent's account and enable a new one.

When the account is enabled, the admin/agent can log in to the system and use the functions corresponding to the role. When the account is disabled, the admin/agent cannot log in to the system.

You can enable/disable the account of an admin/agent on the Agent page.

Set Agents' Maximum Conversations (Capacity)

If the “Allow agents to set their maximum conversations” feature is turned on, agents can set their maximum conversations on the Conversations page. To turn on this feature, go to “Admin Mode > Settings > Function Settings”.

If the “Allow agents to set their maximum conversations” feature is turned off, admins can set agent's capacities on the Agent page, and agents cannot change their maximum conversations on the Conversations page. To turn off this feature, go to “Admin Mode > Settings > System Settings”.

Teams

A team consists of agents with similar skill sets. These agents can handle the same type of problems. You can use teams to improve the agents' efficiency and professionalism.

On the Team page, you can create multiple teams and add multiple agents to each team. You can search for members in a team based on the agent nickname, filter team members based on their online status, and update team members in batches.

Search: In the search box, enter the agent nickname or login email address. The system automatically displays the matching team members.

Filter: In the top right of the member list, select the online status (select all by default). The system automatically displays the team members in that status.

Permissions

Admins can create custom roles and set each role's permissions to pages in Agent Mode and Admin Mode.

To create a role for agents:

1. Add a role. Go to “Admin Mode > Agents > Permissions”, click Add Role, enter the role name, and click Add.
2. Set permissions for the role. Click the new role, select the pages in the Agent Mode and Admin Mode, and click Save.
3. Set data permissions for the pages. You can set the data permissions to tenant or team for the

Customers, History, and Ongoing pages in the Admin Mode.

If you grant the role tenant-level data permissions, the user can view and operate all the data on the page, including data of all teams.

If you grant the role team-level data permissions, the user can view and operate only the data of the team that the user belongs to.

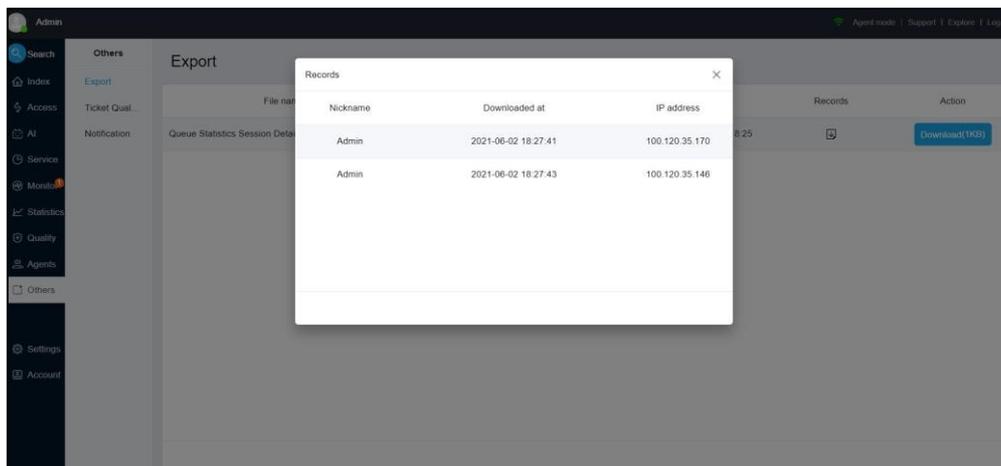
4. Set the role of a user. Go to “Admin Mode > Agents > Agent”, click the Edit button to the right of a user, choose a role, and click Save.

Others

Export

In the Admin Mode, on the Export page, admins can download the files exported by all agents and other admins, and view the download records for each exported file, including the agent name, download time, and IP address.

- Agents: can export notes and conversations from the Note and History pages in the Agent Mode.
- Admins: can export notes and conversations from the Note and History pages in the Agent Mode, and export notes, conversations, and customer profiles from the Search, Note, Customers, History, and Review pages in the Admin Mode.



Download Files

Each file is valid for 7 days. Download it within the validity period. The size limit for exported files is 50 MB. Oversized files cannot be exported.

Exported files may contain URL links for rich media messages (such as voice and pictures). To

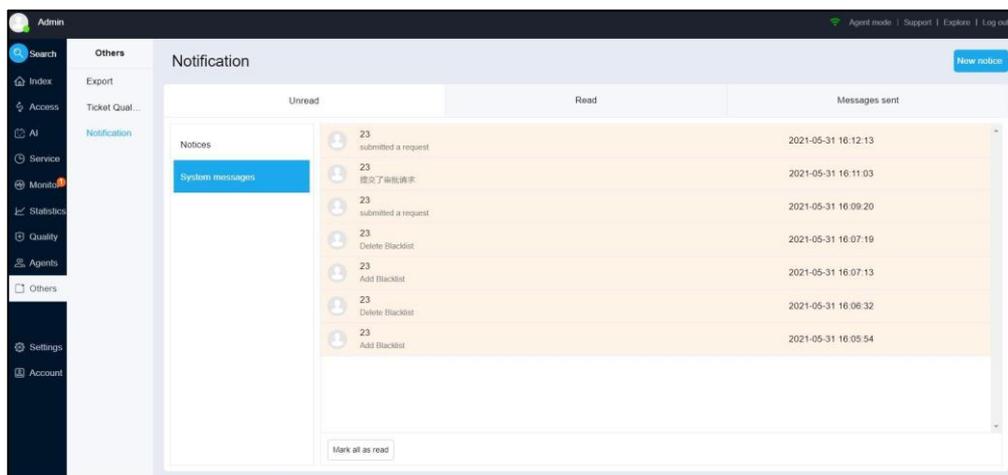
view these rich media messages, just open the URL links with your browser.

Notifications

You can view the latest messages on the "unread" tab page, and click on the message to display the details of the message. After the message is viewed, it will automatically change to the "read" state. And after you refreshing the page, it will be transferred to the "read" tab page.

When receiving the system message related to the agent (eg. the inactive conversation ends automatically), you can click the "view details" button on the message details page to enter the “agent” page to view the details of the agent.

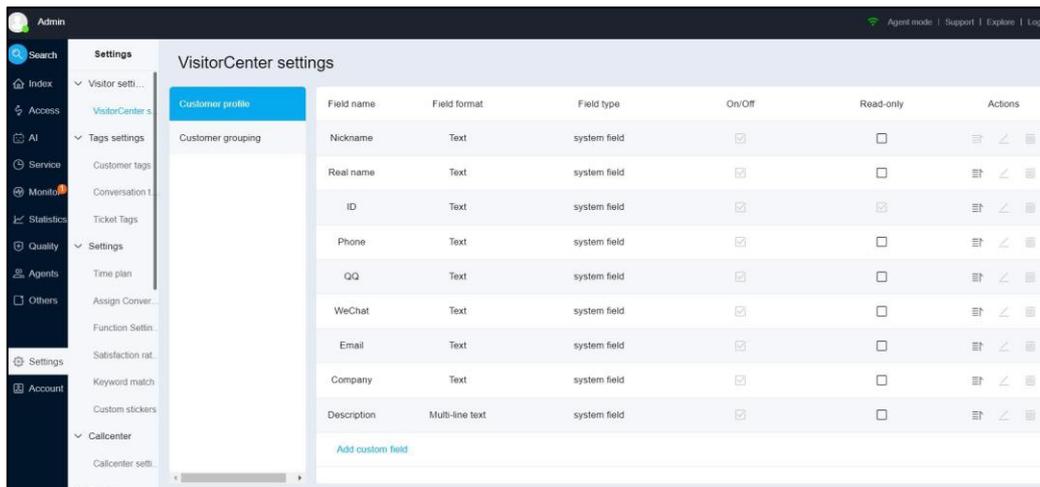
Click "mark all as read" to quickly mark all message status of the current page as read.



Settings

Visitor settings

In the Admin Mode, the Visitor Center settings page shows all the customers who are served in the system. Admins can view the customer profiles and manage the customers.



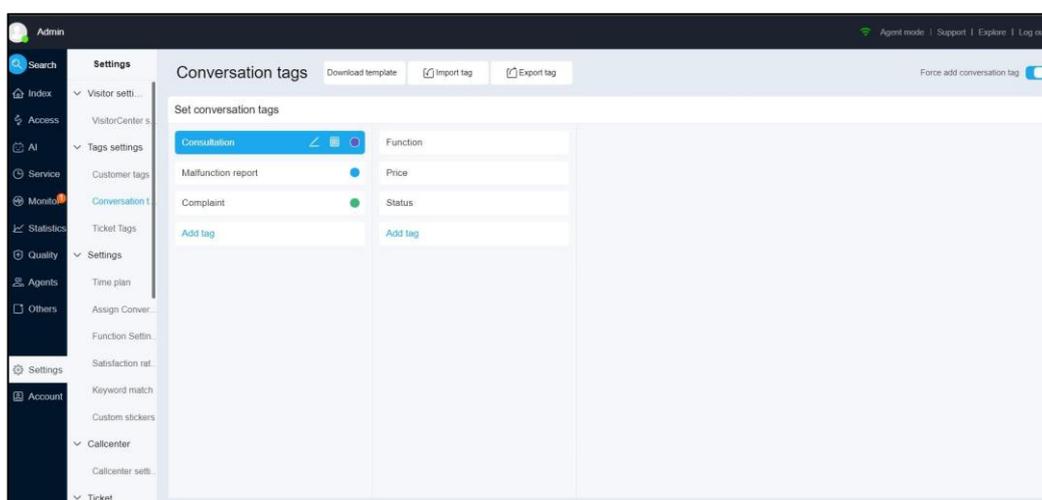
Tags Settings

Conversation Tags

A conversation tag summarize and annotates a type of conversations so that the conversations can be analyzed and tracked in the future. Up to 10 levels and 1,000 conversation tags are supported. There can only be 20 level-1 categories.

Conversation tags are set by the admin for use by all agents.

- If you turn on the “Force add conversation tag” feature, the agent must add at least one conversation tag to the conversation before closing it.
- If you turn off the “Force add conversation tag” feature, the agent does not have to add a conversation tag to the conversation before closing it.

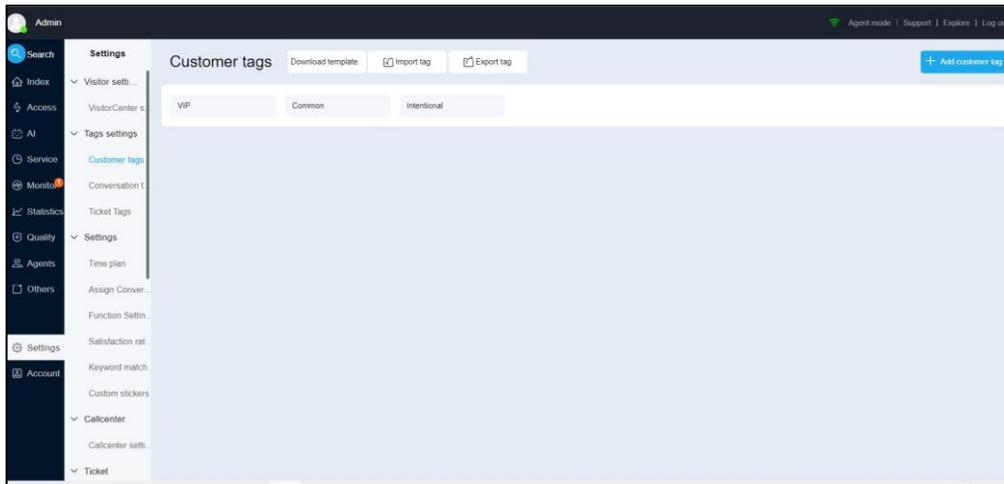


Customer Tags

A customer tag identifies a type of customers in order to classify and manage customers. You can organize the customer tags using the import and export function.

Note: When you import customer tags, the system accepts only the new ones. Existing customer tags are filtered out.

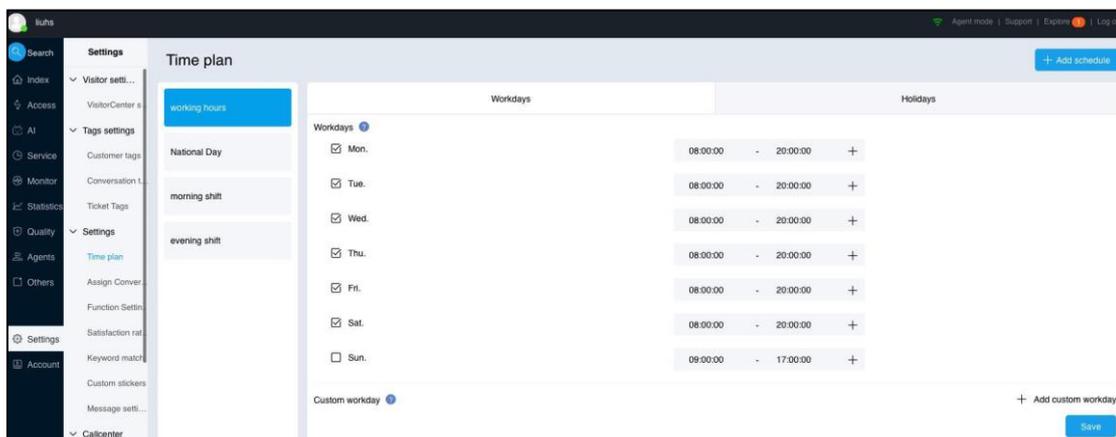
Customer tags are set by the admin for use by all agents. After the admin sets the customer tags, agents can add them to customers during conversations. One or more customer tags can be added to one customer.



Settings

Time Plan

In the “Time plan” page, it supports setting the workdays and the holidays, the working hours except the holiday time is the business hours in the schedule. It supports setting multiple schedules, and supports apply the schedule to routing rules, Teams etc.

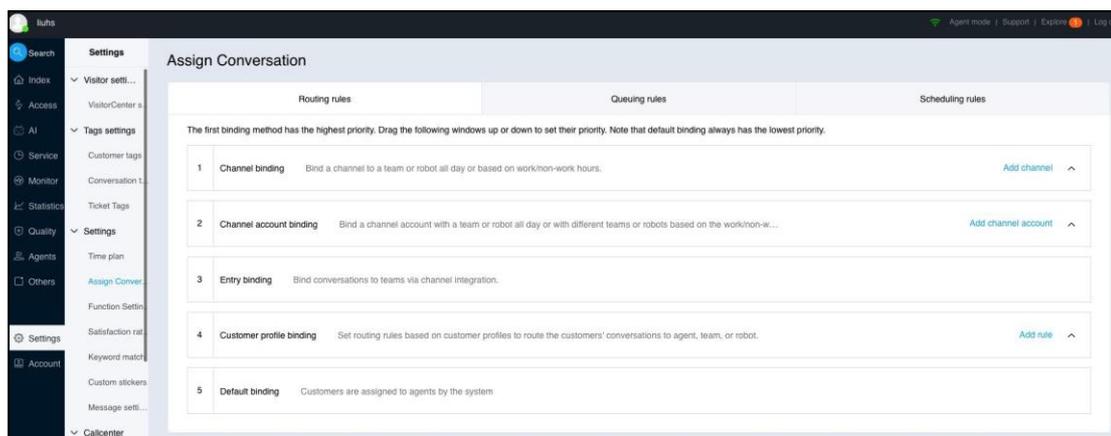


The default schedule is preset in the "Settings > Time plan" page, which is effective for routing rules and Teams. You can manually modify or create a new schedule.

Single schedule: if your team has the same working time, you can keep the "system default" time plan;

Multiple schedules: if your team's working hours are inconsistent, you can add a new schedule, bind it to the team, or use it for routing rule setting.

Assign Conversation



You can create routing rules for conversations from different channels (app, web, WeChat, and Weibo) and different channel accounts (IM accounts, WeChat official accounts, and Weibo accounts). You can create a variety of routing rules by binding the robot or teams with channels or channel accounts and adjusting the order of channel binding, channel account binding, and entry binding.

To set routing rules, go to "Admin Mode > Settings > Assign Conversation".

Channel Binding

With channel binding, you can bind a robot or team with a channel for all day or work/non-work hours.

The channel binding list shows the channels that are bound with robots or teams. To bind a robot/team to a new channel:

- Click Add Channel, select one or more channels, and click Add.
- On the right side of a channel, select "All day" or "Work/non-work hours" and select the robot or team.

Channel Account Binding

In the app, WeChat, Weibo channels, you can create multiple channel accounts. In the web channel, you can specify an IM account to the web widget. If not specified, conversations are routed through the first IM account (usually the default IM account). With channel account binding, you can

bind a robot or team with a channel account for all day or work/non-work hours.

The channel account binding list shows the channel accounts that are bound with robots or teams. To bind a robot/team to a new channel account:

- Click Add Channel Account, select one or more channel accounts, and click Add.
- On the right side of a channel account, select “All day” or “Work/non-work hours” and select the robot or team.

Entry Binding

When you integrate app and web channels, you can specify different teams to “Contact us” buttons. This method of specifying teams via integration is called entry binding.

Default Binding

If a conversation is from a channel or channel account that is not bound with any team, the system automatically assigns the conversation to the default team.

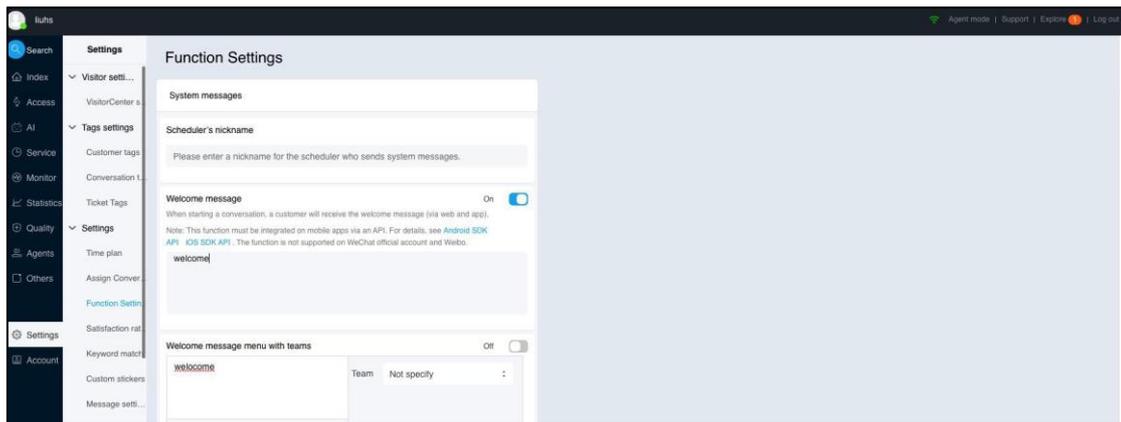
Set the Priority

The priority of a routing rule is described as follows:

- The first binding method has the highest priority. Channel binding, channel account binding, and entry binding can be dragged up or down. The default binding always has the lowest priority.
- In a situation where the robot is bound with a routing rule with a higher priority and a team is bound with a routing rule with a lower priority, when “chat with agent” is triggered:
 - a. If a team is specified by “transfer to team” on the “Robot > Robot Settings > Auto Reply > Chat with Agent Settings” tab, the conversation is assigned to this team.
 - b. If “transfer to team” is not specified on the “Robot > Robot Settings > Auto Reply > Chat with Agent Settings” tab, the conversation is routed to the team bound with the routing rule with a lower priority.
- In a situation where a team is bound with a routing rule with a higher priority and a robot is bound with a routing rule with a lower priority, the conversations are directly routed to the team. Note that teams do not transfer conversations to the robot.

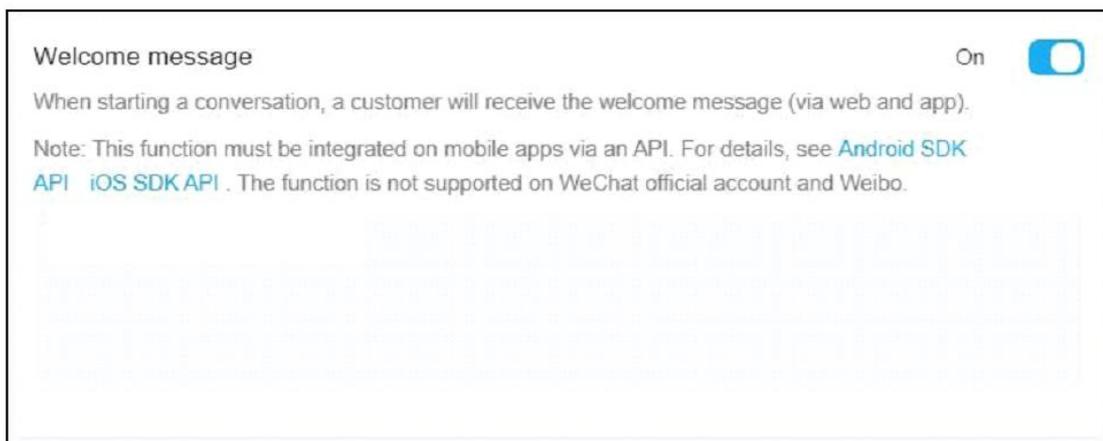
Function Settings

On the function setting page, you can set the system custom message and other system switches.



Welcome message

The administrator can enter the admin mode, select "Settings > System setting", and set the welcome message. When the agent opens the chat window, they will receive the enterprise welcome message automatically sent by the system before they send the first message. It only supports text types (up to 500 words).



Actions if customer does not reply within the timeout period

During the conversation, when the agent sends a message, if the customer does not reply after the set time period, the system can remind the customer and remind the agent.

When turned on "Remind agent" switch, if the customer does not reply within the specified timeout period, the system displays the conversation with a background color on the top of the ongoing list.

When turned on "Remind customer" switch, if the customer does not reply within the specified timeout period, the system automatically sends a message to the customer.

Actions if agent does not reply within the timeout period

Timeout 00 : h 01 : m 00 : s

Remind agent On
 When turned on, if the agent does not reply within the specified timeout period, the system displays the conversation with a background color on the top of the ongoing list.

Remind customer On
 If the agent does not reply within the specified timeout period, the system automatically sends a message to the customer.

客服超时未回复

Alarm records On
 When turned on, an event is sent to the Alarm Records page if an agent didn't reply within the timeout period. Admins can view the analytics and records.

Alarm level Level 1...

[Save](#)

Close conversations if customer does not reply

When the switch is turned on, if a customer didn't reply within the preset time period, the system will send messages to remind the customer, and then if the customer still doesn't reply, the system will close the conversation. If the message is empty, no message will be sent. When the switch is turned off, no prompt will be sent and the conversation will not end automatically.

Automatically close inactive conversations

For the ongoing conversations, If neither the agent or agent replies within the preset time period, the system automatically sends a message to the agent and closes the conversation.

Note: if the "Close conversations if agent does not reply" switch is turned on at the same time, the conversation will be automatically terminated when the conditions of any switch are met.

Automatically close inactive conversations Off

If neither the customer or agent replies within the preset timeout period, the system automatically sends a message to the customer and closes the conversation.

Timeout 24 : h 00 : m

Message

I'm going to close this conversation. Thank you for your time. Have a nice day!

When closing the conversation, add the following tags and remarks:

+Conversation tags and remarks

[Save](#)

Remind queuing customers

When the switch is on, the system will automatically send a message to remind the customers after they queued for the preset remind time.

you can click "Setting" tab, turn on the "Remind queuing agents" switch, and set the prompt message, remind time (all day, work hours, non-work hours), queue timeout reminder time, reminder

times and reminder interval. The switch is off by default.

When the reminder times is set to 1, the system will send prompt message to the agents when their queuing time reaches "Reminder time";

When the reminder times is set to multiple times (for example, three times), if the queuing time reaches the "Reminder time", the system will send message to the agents. After that, once the time interval reached "Reminder interval", the system will send prompt message to the agents again until the conversation is picked up by the agent or the "number of reminders" is reached.

When the "Add a Note button to the message" switch is turned on, if the agent is queuing and the conversation cannot be picked up in time, the agent is allowed to send a message, automatically end the conversation at the same time.

Remind queuing customers On

After a customer queued for the preset remind time, the system automatically sends a message to the customer.

Message

1231112123asdassad 饭撒

Effective time All day

Remind time 00 : h 03 : m 00 : s

Num of reminders Only 1

Add a Note button to the message On

When turned on, the message contains a Note button. The customer can click this button and leave a message. In the meantime, the queued conversation is closed.

Tip: An API method must be called to enable this function on your app.

When closing the conversation, add the following tags and remarks:

+Conversation tags and remarks

Save

Require confirmation for conversation transfer

If turned on this switch, when agent A transfer the conversation to agent B, it can be transferred successfully only after agent B accepts it.If agent B refuses or fails to respond after the time period, the transfer will fail or fail, and the conversation will continue queuing or at the conversation page of agent A. The time period of transfer can be customized.

Require confirmation for conversation transfer On

When turned on, the agent who receives a conversation transfer must confirm it; otherwise, the conversation cannot be transferred.

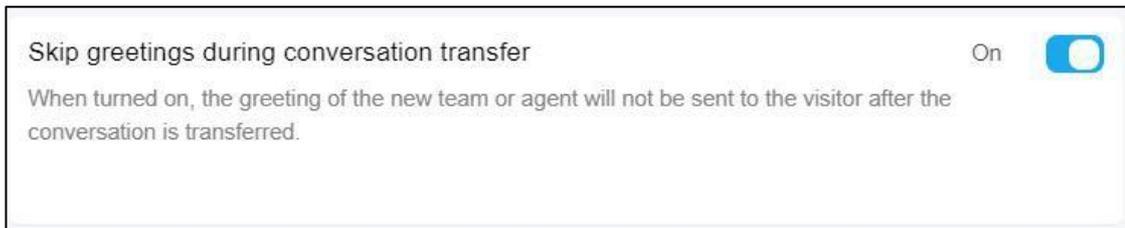
Timeout 4m

Skip greetings during conversation transfer

By default, when the agent's conversation is successfully transferred to other Teams or agent,

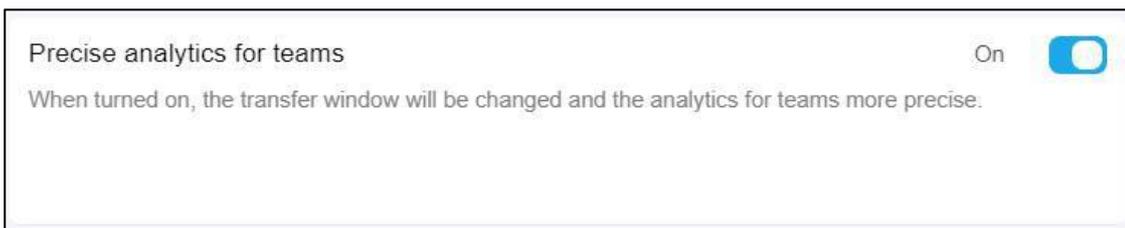
the system will automatically send the Team greetings and agent greetings to the agents.

If you want to transfer the conversation without sending the skills group greetings and agent greetings, you can enter the “Admin mode > Settings > System setting” page, and turn on the "Skip greetings during conversation transfer" switch. After the switch is turned on, when the transferred conversation is picked up by the agent, the Team greetings and agent greetings are no longer sent to the agents.



Precise analytics for teams

Whether the switch is turned on or not, there will be team data, team tab page is displayed to the transfer page in admin mode and agent mode, and the team tab page is set as the first option and default setting.



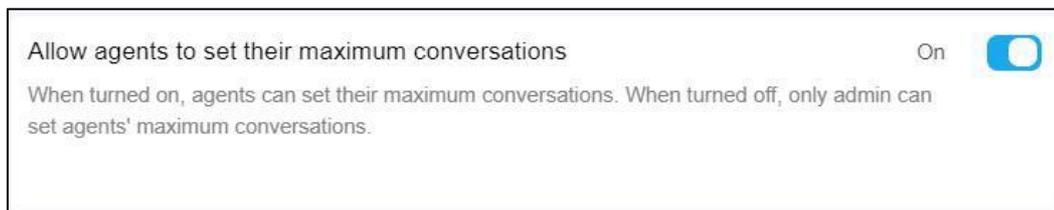
Allow agents to set their maximum conversations

The maximum number of conversations can be set by the administrator or agent, controlled by the switch.

When the switch is turned on, the maximum number of conversations is set by the agent themselves. The administrator can only view the results instead of setting it.

When the switch is off, the maximum number of conversations is set by the administrator. The agent can only view the results instead of setting it.

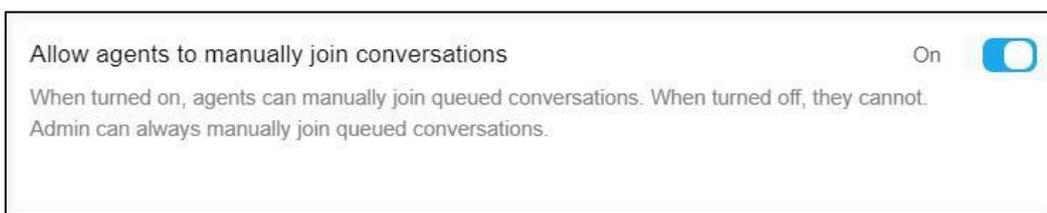
Note: when the administrator modifies the maximum number, the system will send a notice to the corresponding agent.



Allow agents to manually join conversations

The administrator can set whether to allow the agent to manually join the conversation from the queue list. When the switch is on, the agent can manually join the conversation from the queue list; when the switch is off, the agent cannot manually join the conversation from the queue list. Administrators can always join the conversation manually. The switch is on by default.

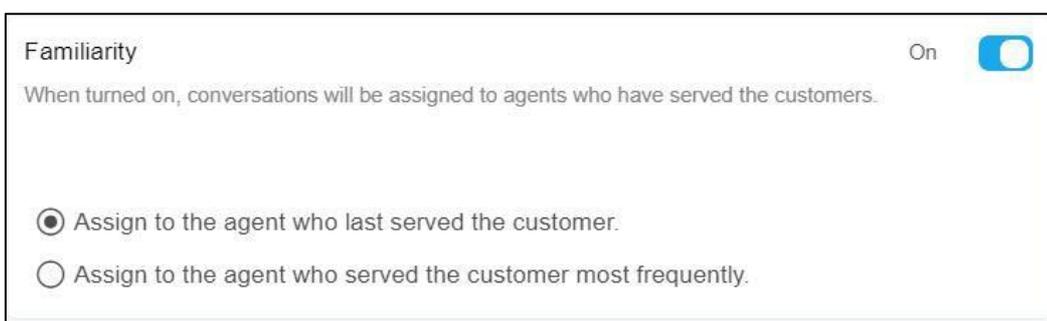
When the administrator turns off the switch, the agent can still view the conversations in "Queue" page, but can't click the "Join" button to manually pick up the conversation.



Familiarity

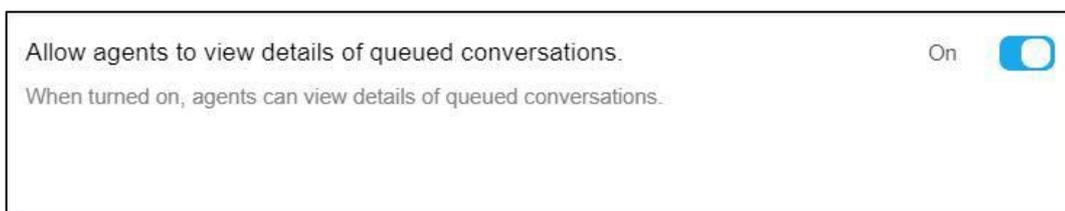
If the familiarity switch is turned on, the system assigns the conversation initiated by the agent to "the agent who served the visitor last" or "the agent who served the agent the most times". This function is turned off by default.

Note: when the familiarity switch is turned on but there is no agent meeting the conditions, the conversation will be allocated according to the default rules of the system.



Allow agents to view details of queued conversations.

When the switch is turned on, you can click any conversation on the "Queue" page in agent mode to view the historical messages of the conversation. Enter the "Settings > System setting" page. The switch is off by default.



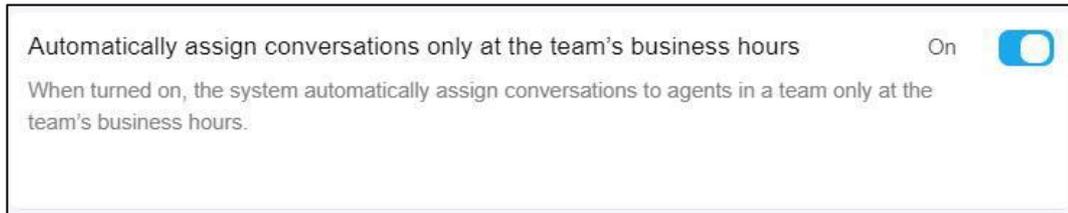
Automatically assign conversations only at the team's business hours

When the switch is turned on, it means that the conversations that are routed to the team will be automatically scheduled to the agent of the team during the working hours of the team, and the

automatic scheduling will be finished in the non working hours of the team. The switch can be used in conjunction with the "Allow agents to manually join conversations" switch, so that all agent only join conversations during the working hours of the team, so that the workload distribution is more equitable.

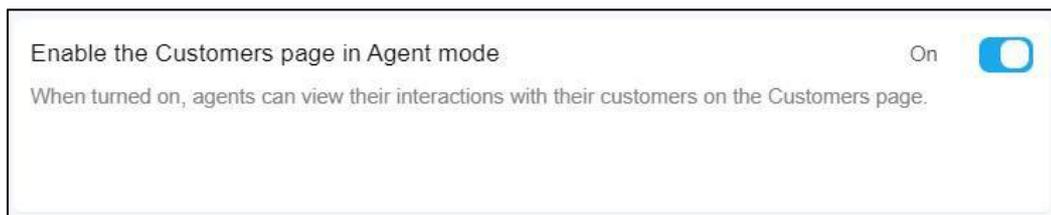
When the team uses different time plans, this function can control the time of automatic assignment conversation to keep consistent with the working time of corresponding team.

Enter the "Admin mode > Settings > System setting" page and you can turn on the switch.



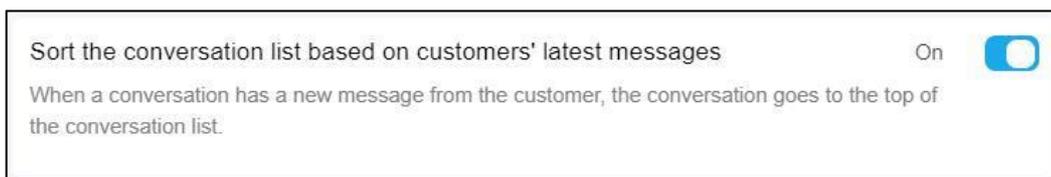
Enable the Agents page in Agent mode

When turned on the switch, the agents can view their interactions with their agents on the Agents page.



Sort the conversation list based on agents' latest messages

If the switch is turned on, when a conversation has a new message from the agent, the conversation goes to the top of the conversation list. It is turned off by default.



Show the time of the last message exchanged

When turned on, the conversation list shows the difference between the last message the agent send and the current time. When turned off, the conversation list shows difference between the last message the agent send and the current time.



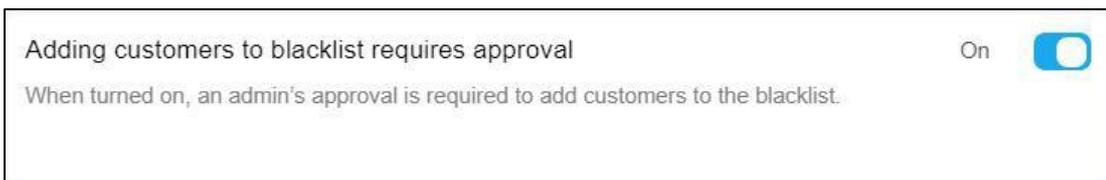
Adopt clean UI on the Conversations page

When turned on, agent and agent nicknames are invisible in the chat window on the Conversations page. If messages are sent within 1 minute, only the first send time is displayed. To view the exact send time, hover over a message.

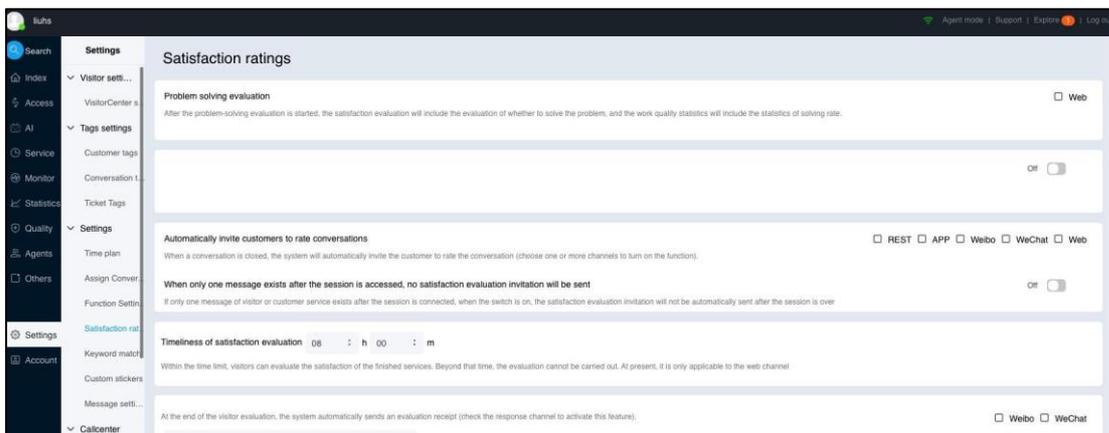


Adding agents to blacklist requires approval

When turned on, an admin’s approval is required to add agents to the blacklist.



Satisfaction survey



Automatically invite customers to rate conversations

If the agent didn't invite the customer to rate the conversation and the customer didn't take the initiative to rate the conversation, when the conversation is closed, the system automatically sends a satisfaction evaluation invitation to the customer.

To turn on this feature for one or more channels, go to “Admin Mode > Settings > System Settings”. When this feature is turned on, you can choose whether to automatically send a satisfaction evaluation invitation when the conversation is served by the robot only.

Set the options in the satisfaction survey to be in descending order

In WeChat and Weibo, the satisfaction survey contains numeric options. When turned off, the options are numbered in ascending order. When turned on, the options are numbered in descending order.

Accept the 1st satisfaction rating in cases of multiple ratings

On app and web widget, a customer can conduct multiple satisfaction ratings for a conversation. When turned on, the 1st satisfaction rating is accepted. When turned off, the last satisfaction rating is accepted.

Do not request for satisfaction rating if the conversation is closed automatically

When turned on, the system does not request for satisfaction rating if the conversation is closed automatically.

Rating options

You can set the text prompts for stars, and add labels for each star level.

For customers:

If you've set the text prompts and labels, the customer has to select a star and a label to finish his satisfaction rating.

Note: Text prompts and labels are supported on the web widget, WeChat, and Weibo.

Keyword Match

You can set a regular expression and an auto reply for keywords in customers' messages. When a customer's message contains a keyword that matches the regular expression, the system automatically sends the reply to the customer. The keyword match feature can help agents and the robot solve customers' problems flexibly and accurately.

The keyword match function is a value-added service. To activate it, please provide the tenant ID and contact Hyphenate.

To configure a keyword match rule:

Go to "Admin Mode > Settings > Keyword Match", click Add Matching Rule. In the "Message content detection rule" window, enter the rule name, set the condition (regular expression), and the execution action (Prompt message for the agent, or send message to the customer and agent), and click Save.

Prompt message for the agent: Display the message in the chat window on the Conversations page. The message is visible only to the agent.

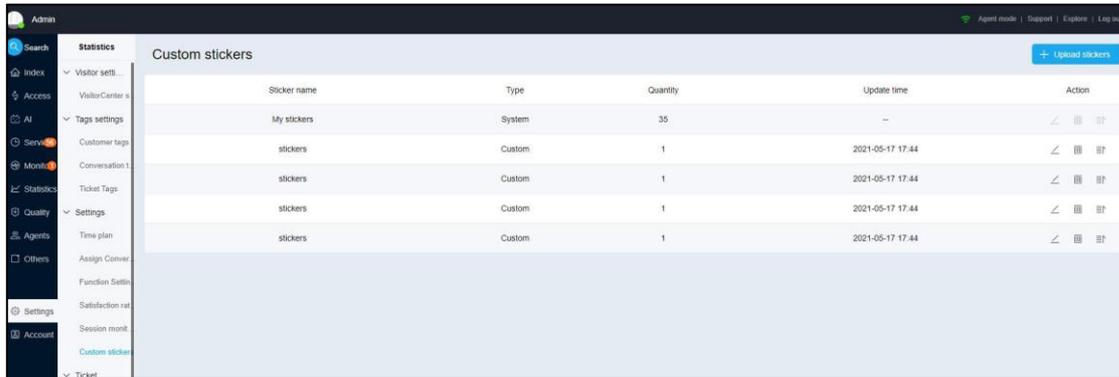
Send message to the customer and agent: Send the message to the customer as the dispatcher. The message is visible to both the customer and agent.

Custom stickers

During the session, the agent can send the customized emojis to APP and web visitors. APP and

web visitors can also send custom emojis to agent. Using custom emoticons can make the chat more personal and interesting.

After the administrator uploads the emojis, the customer service panel, APP and web visitors can use them.

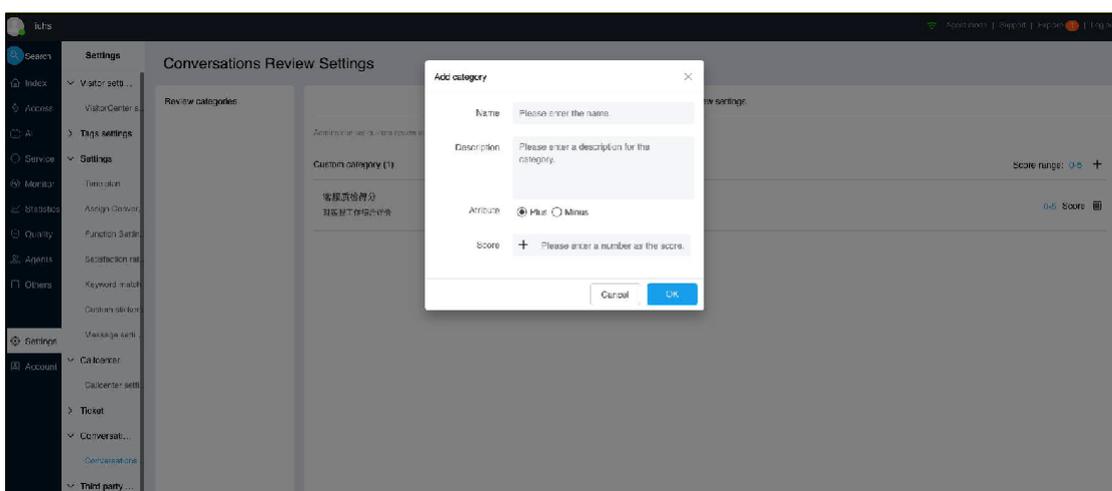


Conversation Review Settings

Review categories can be customized according to your quality control standards. The total score is calculated based on the scores of each category and analyzed to show the overall performance.

The score ranges are divided by the system automatically and used to show the percentage of review ratings that fall in different score ranges.

Note: Modifications to review categories take effect immediately. It is recommended that you set the review categories in the beginning of a month.



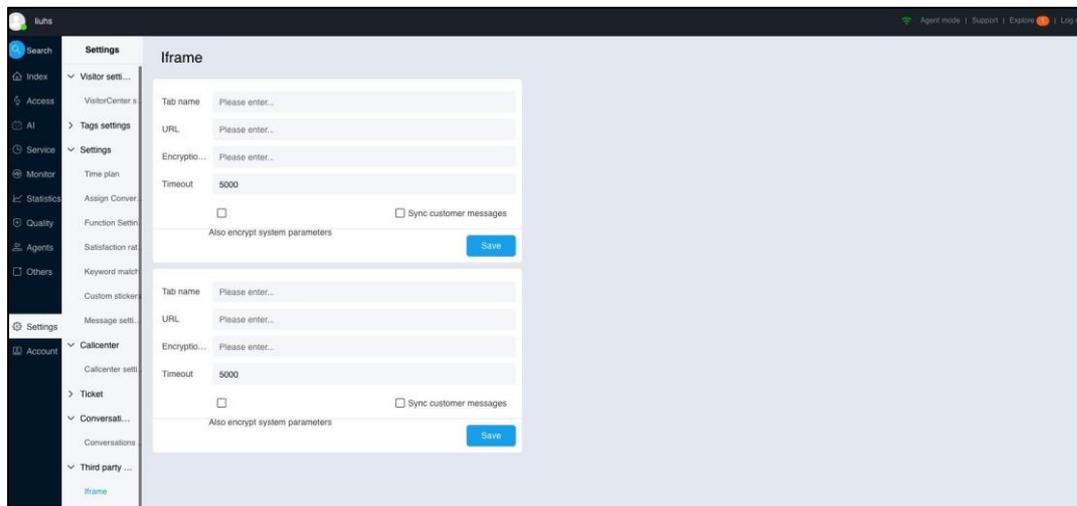
Iframe

It provides an open iframe window (at the right of the Conversations page) to display any information (usually CRM).

You can encrypt the parameters in requests submitted to your CRM system. It adopts the DES algorithm-based symmetric encryption method. If you need to encrypt the customized parameters in the GET request, you can set an encryption key of more than 8 bits on the iframe page. The encrypted GET parameters must be decrypted using the same key. The encryption key is optional and plain text is used if no key is filled in.

To set the iframe window:

- Go to “Admin Mode > Settings > Iframe”.
- Fill in the window name and URL address (such as the URL address of your CRM system).
- (Optional) Set the encryption key.
- Click Save.

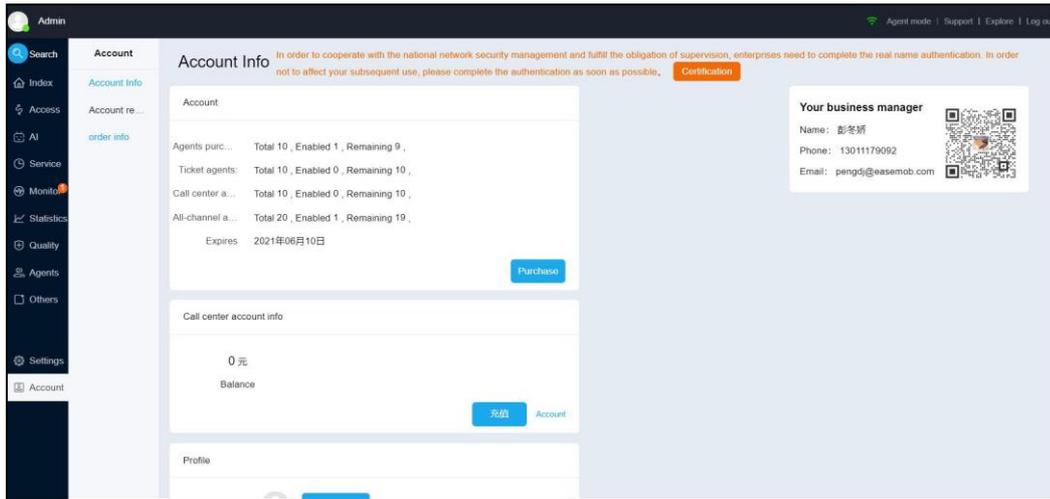


Account

Account Info

Account info consists of account info and profile. The account info includes the license and expiration date. The profile includes the company logo, company name, tenant ID, phone number, address, and description.

To view the company profile and buy more agents, go to “Admin Mode > Account > Account info”.



Order info

You can buy new seats, renew your account, buy more seats, and view the order information.

- Go to “Admin Mode > Account > Order Info”, and click Purchase.
- Select the payment type, effective period, number of agents, and click Submit Order.

At present, only agent seats in the essential edition can be bought online. Payment types include:

- New purchase: If it's your first time to buy seats, select New Purchase.
- Renewal: If you need to extend your tenant's expiration date, select Renewal.
- Buy more: If you need to increase the number of seats, select Buy More.
- Note: When you buy more agent seats, the expiration date of the new seats is the same as that of your tenant. The agent fee is charged based on the expiration date.

