# **Online customer service system**

Absoloop

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# **Agent Mode**

# Conversations

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

	Admin	<b>G</b>			Admin mode   Explore   Log out
-		Conversations Maxim	um conversations 10 : Served conversations: 0	losed conversations:	0 Login duration: 1h27m Message alert
	Conversations	Ongoing Colleague	webim-visitor-HYYV9C9BYB4VQTPXTEF6 (From: Demo IM account)		
e S		Q Search	IP: 211 157.146.18	pand Profile	Interactive r Phrases Knowledge
y B	Queue ™≂>++#	webim-visitor-HY 20 hrs	Dispatcher [May 31 15-	4:56] Nickname	webim-visitor-HYYV9C9BYB4VQTP:
			[May 31 15:45:06] webim-visitor-HYYV9C9BYB4VQTPXTEF6	Real name	Real name
			S hyjubgijkihbnku	ID	webim-visitor-HYYV9C9BYB4VQTB
Ø	Knowledge	i	Dispatcher [May 31 15: Hi there. How can I help you?	<sup>5:06]</sup> Phone	Phone number
14			Dispatcher [May 31 15:	8:06]	QQ ID
E			The agent is busy, please wait a moment	WeChat	WeChat ID
Ċ			Dispatcher [May 31 15: The agent does not reply within the timeout period	Email	Email address
۲				Company	Company name
Ð			□ 🖾 🗊 🗖 뵺 Type your message here	Descripti	Description
Ð		Conversation List	Chat Window		Functional Area

• **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.

# Ongoing Colleague Q Search webim-visitor-J9PY... 10s Hi there. How can I help you?

#### **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

Lucy	×
hi	
kefu.easemob.com	\$

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.

Send messages with Enter

Send messages with Shift+Enter

Profile	Phrases	Knowledge	Interactive record
Nickname	webim-visitor-HYYV9	C9BYB4VQTPX	TEF6
Real name	Real name		_
ID	webim-visitor-HYYV9	C9BYB4VQTPX	TEF6 B
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 Absoloop 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 ta'

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"  $\square$  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

ustomer tags
VIP Common Intentional

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.

Add conversation tags a	and remarks	×
Q Search		
咨询	•	
报故障	•	
投诉	<ul> <li>Select a tag on the left</li> </ul>	
发多少方式	•	
fs	•	
fs	•	
You've selected:		
Add remarks		
		0/1000
		Cancel

#### **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.

Agent	Team
Agent	Q
💽 уух	Admin
liuhs	perftest69
perftest86	perftest11
perftest25	perftest9
perftest53	perftest52
109 results K < 1 2	3 4 5 6 10 > X

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.

Agent	Team
Feam	C
	Show common
තී 100000103262A(0/0)	€ 100000110699A(0/0)
& 100000110795A(0/0)	
🖧 10000011621502849A(0/0)	
🖧 10000011621502859A(0/0)	
公 100000126888A(0/0)	
31 results K < 1	2 3 4 > >

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 starts (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.

Profile	Interactive record		
Search for phras	e		1≣
<ul> <li>Welcome phr</li> </ul>	ases:		
Hello, I'm very gla	d to serve you. What	can I do for you?	
Hello, I'm glad to s	erve you. The goods	you just mentioned	are in stock. There
Hello, I need to ch	eck the inventory list	. Please wait a mom	ient.
Hi, dear, your visio	on is very good, and I	personally like the o	ne, too.
> Dialogue phra	ases:		
> My phrases			+ ∠

#### **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.

	Admin	90		🗢 Admin mode 🛷 Boginner out
4		Conversations Maxi	num conversations 10 :	Served conversations: 1 Closed conversations: 0 Login duration: 8h3m Message alert
Ð	Conversations			
¢		Ongoing Colleague	23	
		Q Search name, nickname		
		Q, 23		
		u la		
			Type your message here	
				Send

- 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.

	cuixin														
	Video call		On	line Queuir	ng									7	Sort
Ø		Î				Pending					Visiting				
X	Queue	0		Customer	Created at	等待时长	Team	Agent	Channel	Channel	VIP	Customer tags	A	ction	
Ø	Knowledge			webim-visito	2021-05-26	16秒	测试		Web	快速创建的	No		$\rightarrow$	<b>\$</b> (	Ð
4															
e		~													
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#### **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.

•	Admin		Admin mode   Explore   Log out
~		Online Queuing	webim-visi(0c35086f-cac8-4906-b976-c6d8447cbd6d) () $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$
Ð			[June 01 18:25:07] webim-visitor-HYYV9C9BYB4VQTPXTEF6 wesadesdw
ç		Customer Created at Wait time Team Agent nickname Channel	Dispatcher [June 01 18:25:07]
X	Queue	webim-vistor 2021-08-01 1 58second Default leam Web 1	Hi there. How can I help you?
R			
Ð			
Φ			
Ζ			
B			
Ç			
۲			
Ø			
Ð			→ Join

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 filters 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.

0	cuixin					🛜 Admin n	nade   Explore   Log out
-	Video call	History session			Select table bar	Conversation ID	Q Y Sort
Ø		Customer	Last customer service	Access time	Conversation types	Channel	Action
×		webim-visitor-TPGY4XPFXT	cuixin	2021-05-26 15:38:27	Inbound	Web	5
Ø		webim-visitor-TPGY4XPFXT	cuixin	2021-05-26 12:08:50	Inbound	Web	5
4		webim-visitor-TPGY4XPFXT	cuixin	2021-05-26 12:02:10	Inbound	Web	5
E	Ticket 🗸 🗸	webim-visitor-TPGY4XPFXT	cuixin	2021-05-26 11:52:33	Inbound	Web	5
Ø	History	webim-visitor-TPGY4XPFXT	cuixin	2021-05-26 11:46:21	Inbound	Web	5
ŧ		webim-visitor-EVEYBXP8T	cuixin	2021-05-26 11:30:35	Inbound	Web	5
٩		webim-visitor-EVEYBXP8T	cuixin	2021-05-25 20:29:21	Inbound	Web	5
2		webim-visitor-EVEYBXP8T	cuixin	2021-05-25 20:25:31	Inbound	Web	5
C		9 yyx-ceshi	cuixin	2021-05-25 19:11:33	Inbound	Web	5
0		O yyx-ceshi	cuixin	2021-05-25 18:50:44	Inbound	Web	5
55		9 yyx-ceshi	cuixin	2021-05-25 18:40:26	Inbound	Web	5
						PC Frank Date	C. Forest bistory
k						C cxpoft Hulai	C cxport history

# 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.

0	Admin	90								🗢 Admin mo	de I Explore I Log out
∠ ©		Appeals									
ŧ	Review ^	All appeals	2	Conversation ID	Appeal No.	Subject	Applicant	Inspector	Date and time	Status	Appeal Result
	Review records	Pending appeals	1	f5a5a7b1-291	2106010001	test	admin	admin	2021-06-01 18:57:42	Pending	
	Appeal records	Processing appeals	0	e7961ba8-8d	2105260001	23	admin	admin	2021-05-26 17:58:01	Closed	Success
÷		Closed appeals	3								
٩											
2		1									
ഥ											
63											
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k											
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# 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.

	Admin	Q 0	Admin mode   Explore   Log ou
<u>∠</u>	History	Search	
÷	Review ^	help O Q Y Sort	
	Review records	Conversations     Messages	
	Appeal records	In the last 7days, there are 6 results.	
÷	Review 🗸	webim-visitor-J9PYMGWMQRR492RFGQ8E/Admin 2021-06-01 15:19:48 Hi there. How can I help you?	
Q	Search	webm-visitor-HYYV9C9BYB4VQTPXTEF6/Admin 2021-06-31 15:45:06 Hi there. How can I help you?	
2	Customers	webim-visitor-CVYPVTTC2FPRF2M329GY/23 2021-05-27 11:12:30 Hittors Howcon Lives were	
ഥ്	Export	webim-vistor-HYYV9C9BYB4V0TPXTEF6/Admin 2021-05-26 15 21 51	
63	Personal info	Hi there. How can I help you?	
14	Phrases	webim-visitor-CVYPVTTC2FPRF2M329GY/Admin 2021-05-26 14:59 23 Hi there. How can I help you?	
	Notification	webim-visitor-CVYPVTTC2FPRF2M329GY/Admin 2021-05-28 14 58:47 Hi there. How can I help you?	
k	Chat statistics		C Export
0	Call statistics		

# 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.

								Adm	in mode   Explore Easemo	ib   Log out
<	Admin	(•)	Cus	stomers						√ Sort
0				Customer	Created at	Customer tags	Name	Phone	Email	Action
8			0	webim-visitor-VJT6	2017-09-06 16:59:10				-	5
Ø		15	0	Jo	2017-09-05 15:55:28		Jo Chen	188****8888	123456@**.com	5
٢			0	Arya	2017-09-05 15:04:24		Arya Stark	13636362637	abv@126.com	5
0										
Ċ	Customers									
3										
٢										
٩										
C										

# 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.

						Admin mode	Explore Easemob   Log out
@ <	Admin	Export					
		File name	Created by	Created at	Expires at	Records	Action
		Search (Conversations)_2017-08-08_2017	Admin	2017-09-06 17:06:20	2017-09-13 17:06:20	Ð	Download(1KB)
		Note.csv	Admin	2017-09-06 17:04:04	2017-09-13 17:04:04	Ð	Download(4KB)
		Conversation History_2017-09-03_2017-0	Admin	2017-09-06 17:03:52	2017-09-13 17:03:52	Ð	Download(2KB)
Ł	Export						

# **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.

•	Admin		90		
4			Profile		
			Avatar	Change avatar	
			Nickname	Admin	
		~	Name	admin	
		~	Employee No.		
		ſ	Phone		
			Fmail	forman@pasameh.com	A
			Linda	ninggungglaamman com	1.00
0	Personal info		Password	Reset Password	
K	Phrases		Language	English	ł.
			Greeting		or 📶
				When a conversation is assigned to the agent, the system automatic	ally
				senos ne grening to me customer.	

# 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!"

phrase	Add phrase	Download template	Import personal phrase	C Export personal phrase
Personal ph Phrases	Hi there. How can I help you?			
classification + $\angle$ $\uparrow$	May I have your name, please?			
My phrases	How may I contact you?			
	Okay. I'll handle it right away.			

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.

0	cuixin			হ	Admin mode   Explore   Log out
-	Video call	Notification			
Ø			Unread	Read	
R		Notices	System 工用(T0000005)有了新同算	2021-05-26 15:4	9:58
Φ		System messages	System 工地(70000005年7内部通知)	2021-05-26 15:4	9:49
4			System The conversation has been closed due to timeout. Th	2021-05-26 15:4	3:37
Đ			System 工单(T0000005)接创建	2021-05-26 15:4	1:51
Θ			System The conversation has been closed due to timeout. Th	2021-05-26 12:13	3:30
Ð			System The conversation has been closed due to timeout. Th	2021-05-26 12:0	6:59
٩			yyx submitted a request	2021-05-26 12:0	1:04
8			System The conversation has been closed due to timeout. Th	2021-05-26 12:0	0:17
Ŭ			System The conversation has been closed due to timeout. Th	2021-05-26 11:52	2:14
۲			I yyx submitted a request	2021-05-26 11:4	1:04
57	Phrases		System The conversation has been closed due to timeout. Th	2021-05-26 11:3	5:45
	Notification		Mark all as read	22 results K < 1 2 > X	
ĸ			· · · · · · · · · · · · · · · · · · ·		

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

erview		2017-09	2017-09-0	06 23:59:59 Today
Conversations	Average conversation duration	Response time	Satisfaction ratings	Agent state distribution
<ul> <li>Served conversations</li> <li>Closed conversations</li> </ul>	20s	Average first response time     Average response time     4s	5	Offline     Login     Online     Away     Invisible     Conline     Login
2		48	Ú	Offline

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.

2021-05-01 00:00 2021-05-31 23:59 100 80 60	Dia 05.17 WeChat 47 Web 30 APP 32 Welbo 2 TOTAL 111							WKOwa ⊠YMAL ∑ APT	I Waibo
20 0 05-15 05-16	05-17 05-18	05-19	05-20	05-21	05-22	05-23	05-24	05-25	05-

# 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.

Admin						중 Agent mode   Support   Explore   Log		
Search	Access	Website				New plugin		
☆ Index ☆ Access	V Channels	Default web widget	Access mode	Style Settings	Function Settings	Billboard Settings		
🖸 Al	App	123	Integrate web widget (recommended)					
<ul> <li>Service</li> <li>Monito</li> </ul>	WeChat Mini Program		Copy the following code and embedd in this * / Eody / tag of your website to quicky access the customer service cloud <script.src* 077349.sandbox.kefu.easembb.com="" easembb.js?configid="ccf35e2-32e3-4159-9829-39b7998cf456'" en-us="" webla="">//script</script.src*>					
∠ Statistics	Wechat Mini P		Preview Copy					
⊕ Quality	WeChat Work Weibo		Integrate H5 widget Please complete the certification f	rst to use the H5 web links, if uncertified,	it only supports open this link in your curren	nt browser. Certification		
C Others	Tik Tok		Copy the following webpage links a https://077349. sandbox. kefu. ez	nd integrate them into your website to con semob. com/webim/im.html?configId=e	nplete the fast access of customer service occ55e2-32e3-4159-9829-39b7998cf456	cloud		
③ Settings	<ul> <li>Ticket Access</li> </ul>		Click link Copy					
Account	Email		Developer Guide					
			For more information, please visit D	commentation Contact technical support	t			
						Reset to defaults Save		

# 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.

Admin					Agent mode   Support   Explore   Log out
Search	Access	Арр			+ Add IM account
☆ Index	✓ Channels				
§ Access	Website	Quick IM account		IM account information	
🖾 AI	App	Status: Connected	App name:	kefusandbox	•
A Sensine	Worthat	Demo IM account	ID:	2288413	
O Gervice	Wechar	Status Connected	Verification:	Pass	
Monito	Mini Program			Login to IM console	
∠ Statistics	Wechat Mini P		Status:	Connected	
Quality	WeChat Work		Bound at:	2021-05-26	
S Agents	Weibo		Developer Guide	Developer Guide 🕜	
C Others	Tik Tok		QR code:		
	Callcenter				
2008 - ANALON	V. Ticket Access				
Settings	* TICKELACCESS				
Account	Email			8000 C & 340 C & 3.0 125 - 5 10 C = 11 C = 10 C	
	Web				
				Note: Scan it with the upp demo to have the IM account configured on the demo.	
			Action:	Edit	
			1.000000000		*

# 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.

🚺 Admin					🗢 Agent mo	de   Support   Explore	🚺   Log out
Search	Intelligence	Phrases	Add phrase	Download template	M Import phrases	C Export phrases	Delete all
f Index	V Robot	classification + / 个					
§ Access	Robot settings		Hello, how can I help you?				
(_) Al	Phrases	greetings					
() Service	Knowledge						
Monitor	Library						
∠ Statistics							
Quality							
운 Agents							
C Others							
Settings							
Account							

# 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.

Admin			₹	Agent mode   Support   Explore   Log out
Search	Intelligence	Knowledge Download t	mplet [[] Import knowledge [[] Export knowledge Set send method	Add knowledge Y Sort
<ul><li>☑ Index</li><li>☑ Access</li></ul>	✓ Robot Robot settings	All knowledge	Aftersale conversation     Helio we have a very confessional after-sales team mark rescores to ensure the quality of service, as far as possible to make customers satisfies	Updated at: 2021-05-26 12:45:46
🖾 Al	Phrases	Draft	Logistics conversion     The non-the determines and their destination in 1.2 date in Earons //Neilsecond Shareholi and 3.6 date outride. Earons //Neilsecond Shareholi	Updated at: 2021-05-26 12:45:46
Service	Knowledge	After-sale knowledge	та должна о чето и и та человано п - с чурт паедецекратан операт как оо чур онине индук, служу ин опера	
✓ Monitor ✓ Statistics	Library	Pre-sale knowledge		
Quality				
옷 Agents				
L) Others				
Settings				
Account				
		Category management		

# 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.

Admin									
Search	Service	Customer info							
Index	✓ Customer								
Access	Infomation	All	Nickname	Created at	Customer tags	Name	Phone	Email	Action
🔁 Al	Log	Blacklist	e webim-visitor-J9PY	2021-06-01 15:19:48		-	-	-	5
Service	✓ Online record	webapp visitorCent	webim-visitor-HYYV	/ 2021-05-26 15:21:50	Intentional Common	-	-	-	5
	History session	Custom Eiller							
⊮ Statistics	Notes	Cusion Pages 2							
Quality	Search								
ය. Agents	✓ Call record								
C Others	History call								
	Outbound task								
Settings	newNavinfo.na								
Account	∽ SMS								
	SMS record								
	SMS template								
									oport profile

#### 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						₽ Sort
Ali	Operation time	Туре	Operator	nickname	Reason	
	2021-05-17 17:36:56	Add to blacklist	b@easemob.com	1000001-1621244209	blacklist reason	
	2021-05-10 19:19:47	Add to blacklist	Admin	1000001-1620645582	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	b@easemob.com	webim-visitor-RWK4E843VVTJEXRHYBCM		
	2021-05-08 15:47:27	Add to blacklist	b@easemob.com	webim-visitor-RWK4E843VVTJEXRHYBCM	111	
	2021-05-08 15:47:13	Remove from blacklist	b@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	b@easemob.com	felf64b39-93df-4d1e-99a9-4c234158f775	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.

Admin						🤶 Agent mode   Su	pport I Explore I Log out
Search	Service	History session			Table Setting	Conversation ID	Q 7 Sort
☆ Index	✓ Customer				10		_
Access	Infomation	Customer	Last customer service	Access time	Conversation types	Channel	Action
🔁 AI	Log	webim-visitor-J9PYMGWMQR	admin	2021-06-01 15:19:55	Inbound	Web	5 4
Service	✓ Online record	webim-visitor-HYYV9C9BYB4	admin	2021-05-31 15:50:09	Inbound	Web	5 4
Monito     Monito     Statistics	History session	webim-visitor-CVYPVTTC2FP	23	2021-05-31 15:14:16	Inbound	Web	5 5
Quality	Search						
Agents	✓ Call record						
C Others	History call						
	Outbound task						
Settings	newNavinfo.na						
Account	∨ SMS						
0.—38	SMS record						
	SMS template						
							C Export

#### 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.

Service	Note Projecti	d:6001	Developer	Guide					Enter a nu	mber 🔍
Infomation	Notes			No.	Created by	Created at	Updated at	Channel :	Assign to	Status
Log	Open notes	ω		14091	yyx-ceshi	2021-05-25 18:29:00	2021-05-25 18:29:00	Web	Unassigned	未处理
Online reco	Pending notes	44		14087	b@easemob.com	2021-05-17 17:38:56	2021-05-17 17:38:56	APP	Unassigned	未处理
Notes 🙆	Solved notes	8		16083	b@easemob.com	2021-05-17 17:38:55	2021-05-17 17:38:55	APP	Unassigned	未处理
Search	All	108		16082	b@easemob.com	2021-05-17 17:38:55	2021-05-17 17:38:55	APP	b@easemob.com	未处理
	Unassigned notes	76		16081	b@easemob.com	2021-05-17 17:38:54	2021-05-17 17:38:55	APP	b@easemob.com	未处理
	Custom filter			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
				14085	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
				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
			Selec	:təl			56 results ( ( 1 2 3 4 ) )			(C) ##

#### 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.

Admin			
Search	Service	Search	
습 Index	✓ Customer		
§ Access	Infomation		
🖾 Al	Log	Conversations     Messages	
Service	✓ Online record		
🛞 Monito	History session	In the last 7days, there are 3 results.	
∠ Statistics	Notes	woom-visior-Juty YMGVMIURK492RFGQ8E/Admin 2021-08-01 15:19:48 Hi there. How can I help you?	
Quality	Search	webim-visitor-HYYV9C9BYB4VQTPXTEF6/Admin 2021-05-31 15:45:06 Hithere Hwy can Leavy voi?	
and Agents	✓ Call record	wohim.viellor.CV/PV/TC/2EDDE2MI326CV/23 2021.05.27 11:12:30	
C Others	History call	Hithere. How can I halp you?	
	Outbound task		
Settings	newNavinfo.na		
Account	∨ SMS		
	SMS record		C Export
	SMS template		

# 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.

Monitor	Alarm records							Ƴ Sort
<ul> <li>Operationa</li> </ul>								
Alarm records	Event name	Atarm level	Date & time	webapp supervision agent_nick	Keyword	Customer	状态	Action
Session timeo	春振经时未回复	Level 1 alarm	2021-05-25 18:53:54	cubin		yyx-ceshi	Unprocessed	
Satisfaction w	春服却的未回复	Level 1 alarm	2021-05-25 18:51:45	cubin		yyx-ceshi	Unprocessed	
<ul> <li>Current ser</li> <li>Conversati</li> </ul>	<b>有限43</b> 时未回复	Level 1 alarm	2021-05-25 18:42:20	cubin		yyx-ceshi	Unprocessed	0
Real time moni.	奏报经时未闻复	Level 1 alarm	2021-05-20 17-27:54	64		1000001-10795	Unprocessed	
Supervise	會很超时未回复	Level 1 alarm	2021-05-20 17:27:51	63		1000001-31832	Unprocessed	
Team monitoring	春辰的外国发	Level 1 alarm	2021-05-20 17:27:49	68		1000001-39687	Unprocessed	
Approvals	有限趋地中国发	Level 1 alarm	2021-05-20 17:27:46	10		1000001-69230	Unprocessed	
Online blacklis	春辰经时末回复	Level 1 alarm	2021-05-20 17:27:42	6		1000001-12429	Unprocessed	
Public phrase r.	會很起的未回复	Level 1 alarm	2021-05-17 17:45:41	b@easemob.com		1000001-57372	Unprocessed	
	有很短时未回复	Level 1 alarm	2021-05-17 17.45:38	b@easemob.com		1000001-24737	Unprocessed	
	春振歸时未回复	Level 1 alarm	2021-05-17 17:45:34	b@easemob.com		1000001-27777	Unprocessed	
	春辰超时中回复	Level 1 alarm	2021-05-17 17:45:13	b@easemob.com		1000001-59730	Unprocessed	0
	書服證时末回复	Level 1 alarm	2021-05-17 17:45:10	b@easemob.com		1000001-60165	Unprocessed	
	會振怒的未回复	Level 1 alarm	2021-05-17 17:45:07	b@easemob.com		1000001-68744	Unprocessed	
	春振録时未回复	Level 1 alarm	2021-05-17 17.45.04	b@easemob.com		1000001-34918	Unprocessed	
	春辰歸时未回复	Level 1 alarm	2021-05-17 17:45:01	b@easemob.com		1000001-79140	Unprocessed	
	Mark all as			134 maults 1 ( 1 2 3 4 5 8	- 1 2 3			10 Fined

# **Current service**

#### **Online Queuing**

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

Agents	Online Queuing									Υ s:
<ul> <li>Operationa</li> </ul>										
Alarm records			Pending					Visiting		
Session timeo	Customer	Created at	等待时长	Team	Agent nickname	Channel	Channel account	VIP	Customer tags	Action
Satisfaction w	webim-visitor-EVEY	2021-05-25 20 28 42	96	Rat		Web	快速的建的关联	No		→
<ul> <li>Current ser</li> </ul>										
Coline Ques										
Current session										
<ul> <li>Conversati</li> </ul>										
Real time moni.										
Supervise										
Team monitoring										
~ Approvals										
Agent status a										
Online blacklis										
Public phrase r.										

#### **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.

Monitor	Current session				yyx-ceshi (I	(bd4aec87-af60-4a21-aaa5-3b37891fb7d5)	₫ ₩	\$ ₽ ¤ © ×
~ Operationa	Guirent session				Type to sea	earch 🔍	Profil	e Phrases
Alarm records	C.	istomer	Agent name	Team Cl	a IP: 211.157.3	346.18 Erpand	Nickname	yyx-cashi 6
Session timeo	• • • • • • • • • • • • • • • • • • •	x ceshi	cubin	v		More message history	Real name	Real name
Satisfaction w						您好,有什么可以帮助您的吗?	D	webim-visitor-XQ7YEJC3G2MB
Online Queuing						y (May 25 19.00:14) 会话中结束。	Phone	13243432321
Current session					(May 25 19:11	11.33] yys-centri	QQ	00.00
✓ Conversati					0.4		Email	Final address
Real time moni.						您好。有什么可以帮助您的吗?	Company	Company name
Team monitoring						y (May 25 19:11:33) 始頃、现在是附成技能出接待您的会语~	Descripti	Description
~ Approvals					(May 25 19 11	it 38) yys-ceshi		
Agent status a					(May 25 19.11	ili AT) yys-caului	Customer taos	2
Public phrase r					0	後	VIPSIP	<b>致退</b> 客户 意向客户
					Type your m	message here		
						Send whisper		

# 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									
Operationa										
Alarm records	Pending	0	Request No.	Requested by	Request time	Туре	Reason	Status		
Session timeo	Approved		257119	уух	2021-05-26 11:22	Agent status request	have a rest	Approved		
Satisfaction w	Rejected		257117	уух	2021-05-26 10:57	Agent status request	上个圆所	Approved		
<ul> <li>Current ser</li> </ul>										
Online Queuing										
Current session										
✓ Conversati										
Real time moni										
Supervise										
Team monitoring										
✓ Approvals										
Agent status a										
Online blacklis										
Public phrase r.										

#### **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 blac	klist appro	val					
~ Operationa	_							
Alarm records	Pending	0	Request No.	Requested by	Request time	Туре	Reason	Status
Session timeo	Approved	0	257120	уух	2021-05-26 11:41	Blacklist approval	No civilization	Pending
Satisfaction w	Rejected	0						
✓ Current ser								
Online Queuing								
Current session								
✓ Conversati								
Real time moni								
Supervise								
Team monitoring								
~ Approvais 🧿								
Agent status a								
Online black								
Public phrase r								

Soarch	Agents	Online black	kliet annro	wal							
D Index	~ Operationa	Of third Diac	kiist appro	i ven		Detail		×			
G Access	Alarm records	Pending	. 0	Request No.	Reque	Request	267120	0	Type	Reason	Status
E AI	Session timeo	Approved	0	257120	35	Type	Blacklet anormal	0	Blacklist approval	No civilization	Pending
() Servi	Satisfaction w	Rejected	0			Depuest	Concerns of the second				
🛞 Monita	~ Current ser					request	114				
∠ Statistics	Online Queuing					Request	2021-05-26 11:41	8			
Quality	Current session					Blacklist ap	proval				
島. Agents	<ul> <li>Conversati</li> </ul>					EVEY	ime: webim-visitor- BXP8TMVVCVY732YC	- 1			
C Others	Real time moni					View o	005010-0327-4910-8896-08813C80052 Iotali				
	Sopenrise					Detron	No chilization				
③ Settings	Team monitoring						report	- APPROVE			
(II) Account	~ Approvals 🚺										
	Agent status a										
	Online black										

#### 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.

🔔 Admin								👳 Agent mo	le   Support   Explore   Log out
Search	Agents	Public phra	ase reque:	st					
습 Index	<ul> <li>Operationa</li> </ul>								
Access	Alarm records	Pending	0	Request No.	Requested by	Request time	Туре	Reason	Status
Č AI	Session timeo	Approved	1	257121	уух	2021-05-26 12:01	Public phrase request	Please approve~	Pending
🕒 Servi 🙆	Satisfaction w	Rejected	0						
Monital	<ul> <li>Current ser</li> </ul>								
∠ Statistics	Online Queuing								
Quality	Current session								
용 Agents	✓ Conversati								
C Others	Real time moni.								
	Supervise								
③ Settings	Team monitoring								
Account	~ Approvals 0								
	Agent status a								
	Online blacklis								
	Public phras								

# **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.

61 50 40 51 62252021 ■ Conversations 5 ■ Messages 61	
40 Messages 61	
30	
20	

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 1 S	erved 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
cuixin	10	10	5/5	0/10	19/20/42	Avg 341/ Max 572	Avg 8/ Max 18
уух	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	010	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	00	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 conversa 🕥	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
e0af3804-8caf-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
100000135384A	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.

Service quality			[ Export by day [ E
Satisfaction ratings 💿	Average first response time 2 Maximum first response time 2	1 m 51 s 4 m 50 s	Average response time      1 m 51 s     Maximum response time      4 m 50 s

#### **Resolved/unresolved distribution**

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

Resolved / unresolved distribution 🔇	Tip: Customer solved / unresolved distribution		

#### **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.

Review ratings		0
	1range(-2 ~ -0.2):0.0% 2range(-0.2 ~ 1.6):0.0% 3range(1.6 ~ 3.4):0.0% 4range(3.4 ~ 5.2):0.0% 5range(5.2 ~ 7):0.0%	

#### 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.

Satisfact	tion label distribution 🍘					
5						
ersations						
Com Com						
0		ant.	 AN CONTRACTOR OF CONTRACTOR OFONTO OF	anti-	d'	
			Satisfaction label			

#### Agents' quality details

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

Agent :	Real Name	Valid conversations (2)	Invalid conversati (2)	Average first respons 😢	Average response 🕘 :	Satisfaction (involv (2)	Evaluati 👔 :	Review (involvement) (2)
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大师哥	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.

🔔 Admin								₹ A	ent mode   Support   Explo	re   Log
Search	Statistics	Agent wor	rktime			2021-05-23 00:00	0   2021-05-29 23:59	Single screening is not more than 6 months	Agent nickname	
	<ul> <li>Analytics</li> </ul>									
§ Access	Workload	Age	ent :	First Login	Last offline	Login :	Online :	Idle time Proportion	Busy :	E
😇 Al	Service quality		tom	2021-05-26 12:33	2021-05-26 16:44	3h 25m 55s	3h 25m 56s	100.00%	0	
③ Servi	Consultation st.		fd	2021-05-25 15:44	2021-05-25 21:14	11h 57m 27s	11h 57m 27s	100.00%	0	
Monit	Agent Statistic		уух	2021-05-25 20:38	2021-05-25 21:14	6h 56m 33s	6h 36m 55s	95.29%	0h 19m 38s	
Quality	Customer data	0	cuixin	2021-05-25 15:58	2021-05-26 13:14	13h 23m 57s	13h 23m 57s	100.00%	O	
😤 Agents	Wait time	e b@ea	semob.com	2021-05-24 10:13	2021-05-25 19:14	4h 45m 4s	4h 45m 4s	100.00%	0	
Others	一次解决里 Custom reports		lluhs	2021-05-26 10:12		6h 47m 23s	6h 47m 23s	100.00%	0	
③ Settings	Statistic		ty	2021-05-26 12:25	2021-05-26 16:44	3h 33m 52s	3h 33m 52s	100.00%	0	
Account	VOC	• Р	erftest3			٥	o	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.

🔔 Admin				🗢 Agent mode   Support   Explore   Log or
Search	Statistics	Customer data		[/] Export all Y Sort
🙆 Index	~ Analytics			
§ Access	Workload		Customers 💽 3	
C AI	Service quality			
🕒 Servi 🥯	Consultation st.			
🛞 Monit	Agent Statistic			
∠ Statistics	Agent worktime			
Quaity	Customer data			
음 Agents	Wait time			
C Others	一次解决率			
	Custom reports			
G Settings	Statistic			
Account	VOC	Channel	Customers 💿 🗄	Percent
		Web	3	100.00%
		Video miniprogram	0	0.00%

#### **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.

🛄 Admin						
Search	Statistics	Wait time				🖺 Export all 🛛 🖓 Sort
🛆 Index	~ Analytics					
	Workload	Wait times 🕥	Succeed times	20s succeed rate	Average succeed time	Number of messages
🖾 AI	Service quality	4	0	0.00 %	0 s	0
() Servi	Consultation st.					
@ Monita	Agent Statistic	Abandoned times	Abandoned rate	Average abandoned time	Average wait time	Max wait time
∠ Statistics	Agent worktime	4	100.00*	2 m 0 s	2 m 0 s	2 m 0 =
Quality	Customer data					
a Agents	Walt time	24-hour conversations () Hist :				
C Others	一次解决率					Conversations Messages
	Custom reports					
Settings	Statistic					
Account	VOC					
		Daily conversations Dia :				
						Se Conversations

#### **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.

Admin										
Search	Quality	Basic I	review					Table Setting	Conversation ID	o 🏹 Sort
	✓ Review									
Access	Basic review		Agent	Customer	Conversation ID	Created at	First response time	Conversation d	Average response time	Maximum re:
🔄 Al	Random review		admin	webim-visitor-J	f5a5a7b1-2910	2021-06-01 15:19	0	11097	0	0
Service	Appeals		admin	webim-visitor-H	f622f782-d24e	2021-05-31 15:45	0	95690	0	o
💮 Monito	✓ Call Review				04-1405-04-0	2024 07 27 44 42	0	47	0	
∠ Statistics	Review		23	webim-visitor-c	9100008-8003	2021-05-27 11.12	0	17	0	0
🕀 Quality	Appeals		admin	webim-visitor-C	91cdd6ba-8dc3	2021-05-27 11:12	0	1793	0	0
	Quality	4								
Others										
Settings										
Account										
		4								,
						4 results $\langle \langle -1 \rangle \rangle$	x			C Export

#### 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.

Admin									
Search	Quality	Random revie	w					+	Create review task
☆ Index	✓ Review							_	
Access	Basic review	All review tasks	2	Task name	Creator	Created at	Inspector	Progress	Status
🔄 Al	Random review	All completed tasks	0	test2	Admin	2021-06-02 18:05:24	Admin	0/3	Reviewing
Service	Appeals	All ongoing tasks	2	test	Admin	2021-06-02 18:05:16	Admin	0/1	Reviewing
Monito	✓ Call Review					2 results 12 / 1 3 3			
∠ Statistics	Review	My review tasks	2						
Quality	Appeals	My completed tasks	0						
ぷ Agents	Quality	My ongoing tasks	2						
C Others									
Settings									
Account									

# 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.

💽 Admin										😌 Agent mode   Supp	art   Explore   Log out
Search	Quality	Appeals								Appeal No.	Q 7 Sort
f Index	✓ Review	-									_
§ Access	Basic review	All appeals	2	Conversation	Appeal No.	Subject	Applicant	Inspector	Date and time	Status	Appeal Result
ē AI	Random review	Pending appeals	1	f5a5a7b1-29	2106010001	test	admin	admin	2021-06-01 18:57:42	Pending	
Service	Appeals	Processing anneals	0	e7961ba8-8d	2105260001	23	admin	admin	2021-05-26 17 58:01	Closed	Success
🛞 Monito 🥯	✓ Call Review	Trocessing appears	Ŭ								#102%/000000X
⊮ Statistics	Review	Closed appeals	1								
Quality	Appeals										
ය. Agents	Quality										
C Others											
Settings											
Account											
											[/] Export

#### **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.

2001060001		
Appeal No.: 2001060001		Process appeal
Created by: 王芳		
Created at: 2020-01-06 11:22:38		When an appeal is pending, the
Conversation ID: 2b614291-2669-4255-ba05-6a3c	db37a899f Conversation detail	appeal. When the appeal is in the
Inspector candy		processing status, the applicant and
Subject: 不公平		When an agreement is reached, the
Reason: 不公平啊		inspector closes the appeal.
Status: Pending		
Comment	Record	
<b>candy</b> 2020-01-06 11:23:18 图片不能变看么 🔀 机器人开通页 png		
0		
Type your reply here		
		Start processing

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.

Admin							
Search	Others	Export	Bacords		, j		
Access	Export Ticket Qual	File nat	Nickname	Downloaded at	IP address	Records	Action
🖄 AI	Notification	Queue Statistics Session Detail	Admin	2021-06-02 18:27:41	100.120.35.170 8.25	٩	Download(1KB)
Service			Admin	2021-06-02 18:27:43	100.120.35.146		
Statistics							
Quality							
용 Agents							
	[						
Settings							
Account							

#### **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.

💽 Admin					
Search	Others	Notification			New notice:
Index	Export				
& Access	Ticket Qual		Unread	Read	Messages sent
ia	Notification	Notices	23 submitted a request		2021-05-31 16:12:13
Service     Monito		System messages	<ul> <li>23 推交了审批请求</li> </ul>		2021-05-31 16:11:03
∠ Statistics			23 submitted a request		2021-05-31 16:09:20
Quality			23 Delete Blacklist		2021-05-31 16:07:19
옷 Agents			23 Add Blacklist		2021-05-31 16:07:13
- O olitica			23 Delote Blackfist		2021-05-31 16:06:32
Settings			23 Add Blacklist		2021-05-31 16:05:54
Account					
			Mark all 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.

📑 Admin							🔶 Agent mode	Support   Explore   Log
Search	Settings	VisitorCenter se	ettings					
	✓ Visitor setti							
§ Access	VisitorCenter s.	Customer profile	Field name	Field format	Field type	On/Off	Read-only	Actions
🔁 Al	✓ Tags settings	Customer grouping	Nickname	Text	system field			
Service	Customer tags		Real name	Text	system field			
Monito	Conversation t.		ID	Text	system field			∎ 2 III.
∠ Statistics	Ticket Tags							
Quality	✓ Settings		Phone	Text	system field			■ × 1
옮 Agents	Time plan		QQ	Text	system field			∎t ∠ III
C Others	Assign Conver		WeChat	Text	system field			
	Function Settin			*				
Settings	Satisfaction rat.		Email	lext	system held		U	III 2 III
丞 Account	Keyword match		Company	Text	system field			III ∠ 1II
	Custom stickers		Description	Multi-line text	system field			∎ ∠ 10
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	Callcenter setti.		Padd Cusion new					
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# **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.

🔒 Admin						
Search	Settings	Conversation tags	Download te	nplate 🕑 Import tag	C Export tag	Force add conversation tag
	✓ Visitor setti					
§ Access	VisitorCenter s.	Set conversation tags				
i۸ ⊡	✓ Tags settings	Consultation Z		Function		
Service	Customer tags	Malfunction report	•	Price		
🕀 Monito 🥬	Conversation t.	Complaint	•	Status		
∠ Statistics	Ticket Tags	Add tag		Add tag		
Quality	✓ Settings					
뽔 Agents	Time plan					
C Others	Assign Conver.					
	Function Settin					
Settings	Satisfaction rat.					
Account	Keyword match					
	Custom stickers					
	✓ Callcenter					
	Callcenter setti					
	✓ Ticket					

#### **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 an 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.

luhs									e   Support   Explore 🧾   Log ou
Search	Settings	Time plan							+ Add schedule
index	✓ Visitor setti…								
Access	VisitorCenter s	working hours		Workdays				Holidays	
🖾 AI	✓ Tags settings		Workdays 🕥						
③ Service	Customer tags	National Day	Mon.		08:00:00	- 20:00:0	0 +		
Monitor	Conversation t	morning chill	🗹 Tue.		08:00:00	- 20:00:0	0 +		
∠ Statistics	Ticket Tags	morning anin	⊠ Wed		08-00-00	20-00-1	o		
Quality	✓ Settings	evening shift	0		08.00.00	- 20.00.0	• т		
ය. Agents	Time plan		🖾 Thu.		08:00:00	- 20:00:0	0 +		
C Others	Assign Conver.		🗹 Fn.		00:00:80	- 20:00:0	0 +		
	Function Settin		E su						
Settings	Satisfaction rat		jog Sat.		00:00:80	- 20:00:0	0 +		
Account	Keyword match		Sun.		09:00:00	- 17:00:0	0 +		
	Custom stickers								
	Message setti		Custom workday						+ Add custom workday
	✓ Calicenter								Save

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**

liuhs			🛜 Agent mode   Support   Explore 👥   Log out
Search	Settings	Assign Conversation	
	✓ Visitor setti…		
	VisitorCenter s.	Routing rules Queuing rules	Scheduling rules
	✓ Tags settings	The first binding method has the highest priority. Drag the following windows up or down to set their priority. Note that default binding always has the lowest priority.	
	Customer tags		
Monitor	Conversation t	1 Channel binding Bind a channel to a team or robot all day or based on work/mon-work hours.	Add channel
	Ticket Tags		
Quality	✓ Settings	2 Channel account binding Bind a channel account with a team or robot all day or with different teams or robots based on the work/non-w	Add channel account
음 Agents	Time plan		
C Others	Assign Conver.	3 Entry binding Bind conversations to teams via channel Integration.	
	Function Settin.		
Settings	Satisfaction rat	4 Customer profile binding Set routing rules based on customer profiles to route the customers' conversations to agent, team, or robot.	Add rule
Account	Keyword match		
	Custom stickers	5 Default binding Gustomers are assigned to agents by the system	
	Message setti		
	La Callandar		

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/nonwork 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.

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Search	Settings	Function Settings					
습 Index	✓ Visitor setti						
S Access	VisitorCenter s.	System messages					
🖄 Al	✓ Tags settings	Scheduler's nickname					
③ Service	Customer tags	Please enter a nickname for the sch	Please enter a nickname for the scheduler who sends system messages.				
Monitor	Conversation t.						
∠ Statistics	Ticket Tags	Welcome message			On		
① Quality	✓ Settings	Note: This function must be integrated on m	oble apps via an A	Pl. For details, see And	roid SDK		
🛎 Agents	Time plan	API IOS SDK API . The function is not sup welcome	orted on WeChat	official account and Wei	bo.		
C Others	Assign Conver.						
	Function Setting						
Cottines	Satisfaction rat						
tor settings	Keyword match	Welcome message menu with teams			Off		
Account	Custom stickore	welocome	Team	Not specify			
	Contra and Contra						
	Message setti						

#### Welcome message

The administrator can enter the admin mode, select "Settings > System setting", and set the welcome message. When the agent open 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).

reicome message												C	Jh		
hen starting a conversation, a customer will receive the welcome message (via web and app).															
ote: This function must be inte PI iOS SDK API . The function	egrated	i on m ot supp	obile a	pps v on W	/ia an /eCha	API. F	For del	ails, ount	see and	And Wei	roid S bo.	SDK	[		

#### 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	fagent d	loes i	not	reply wi	ithin tl	ne tir	meout p	period		
Timeout	00	:	h	01	:	m	00	:	S	
Remind a	agent								On	C
When turn displays th Remind o	ed on, if the converse custome	he age sation r	ent c with	loes not a backg	reply v Iround	vithin color	the spe on the t	cified tir op of th	meout period, the system ne ongoing list. On	6
If the agen message t	t does no o the cust	t reply tomer.	/ witl	nin the s	pecifie	d tim	eout peri	od, the	system automatically sends a	
各版超	时未回复									
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When turn timeout pe	ed on, an riod. Adm	event ins ca	t is s an vie	ent to the	e Alarr nalytic	n Reo s and	cords pa records	ge if an	agent didn't reply within the	
Alarm lev	/el		Le	vel 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.

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n neither tr	ie custo	omer or	agen	replies	within	i 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 goir	ng to cl	lose th	is co	nversat	ion.	Thank you for your time. Have a nice day!		
I'm goir	ng to cl	lose th	is co	nversat	ion. <sup>-</sup>	Thank you for your time. Have a nice day!		
l'm goir When clo	ng to cl	lose thi	is co /ersa	nversat ation, ac	tion. T	Thank you for your time. Have a nice day! e following tags and remarks:		
I'm goir When clo +Conver	ng to cl sing th sation	lose thing the conversion of t	is co /ersa .nd re	nversat ation, ac	tion. T	Thank you for your time. Have a nice day! e following tags and remarks:		

#### **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 cus	stomers	reset re	mind time	the syste	m automati	cally se	ends a message to the distomer	On	
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Effective time	All day	:							
Remind time	00	: 1	h 03	‡ r	n 00	\$	S		
Num of reminders	Only 1	:							
Add a Note button to	the mes	sage							
When turned on, the me	essage cor	ntains a	Note butto	on. The cu	stomer car	l click t	his button and leave a message. In the meantime, the queued conversation is closed.	On	
Tip: An API method mu	st be called	to enal	ble this fur	nction on y	our app.				
When closing the co	nversatio	on, add	the follo	wing tag	s and rem	narks:			
+Conversation tags	and rem	arks							
								Em	

#### **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 co	onfirmatio	on for	conversation transfer	On	
When turne conversation	d on, the a n cannot b	gent v e tran	ho receives a conversation transfer must confirm ferred.	it; otherwise, the	
Timeout	4m	4			

#### 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

themself. 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

🚺 liuhs			🤝 Agent mode   Support   Explore 🚯   Log out
Search	Settings	Satisfaction ratings	
index	✓ Visitor setti		
§ Access	VisitorCenter s.	Problem solving evaluation After the condition evaluation is started the control to evaluation will include the evaluation of whether to solve the problem, and the work public statistics will include the statistics of solving rate.	C Web
🗇 AI	✓ Tags settings	The set protect writing transmitting and the dependence statement in a state in transmost or meteric to act is provided, and the dependence or announce or acting the	
() Service	Customer tags		
@ Monitor	Conversation t		Ott 🛄
⊮ Statistics	Ticket Tags		
① Quality	✓ Settings	Automatically invite customers to rate conversations	
음 Agents	Time plan	When a conversation is closed, the system will automatically invite the customer to rate the conversation (choose one or more channels to turn on the function).	
C Others	Assign Conver.	When only one message exists after the session is accessed, no satisfaction evaluation invitation will be sent	on 🔘
	Function Settin	If only one message of visitor or customer service exists after the session is connected, when the switch is on, the satisfaction evaluation invitation will not be automatically sent after the session is over	
G Settings	Satisfaction rat.		
Account	Keyword match	Limekiness or saustaction evaluation 08 ; h 00 ; m	
	Custom stickers	Within the time limit, visitors can evaluate the satisfaction of the finished services. Beyond that time, the evaluation cannot be carried out. At present, it is only applicable to the web channel	
	Message setti		
	~ Calicenter	At the end of the visitor evaluation, the system automatically sends an evaluation receipt (check the response channel to activite this feature).	Weibo     WeChat

#### 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 start 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.

🛄 Admin					😤 Agent mode	Support   Explore   Log ou
Search	Statistics	Custom stickers				+ Upload stickers
🟠 Index	<ul> <li>Visitor setti</li> </ul>					
S Access	VisitorCenter s.	Sticker name	Туре	Quantity	Update time	Action
🖾 AI	$\sim$ Tags settings	My stickers	System	35	-	二 田 田
() Service	Customer tags	stickers	Custom	1	2021-05-17 17:44	∠ ⊞ ≣1
🛞 Monita	Conversation t.	stickers	Custom	1	2021-05-17 17 44	< III III
∠ Statistics	Ticket Tags					
Quality	✓ Settings	stickers	Custom	1	2021-05-17 17:44	垣 圓 △
뽒. Agents	Time plan	stickers	Custom	1	2021-05-17 17:44	1≣ ⊞ ∠
C Others	Assign Conver.					
	Function Settin					
Settings	Satisfaction rat					
Account	Session monit.					
	Custom sticker					
	12222000					

# **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.

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Search	Settings	Conversations Revi	Conversations Review Settings			_	
∰ Index	✓ Visitor setti		J	Add category		×	
Å Access	VisitorCenter s.,	Review categories		Name	Please errer the name.	sw sentings	
Ċ Al	> Tags settings		Activity of the second statement of				
Service	✓ Sattings		Custom category (1)	Description	category.		Score range: 0-5 +
les Monitor	Timo plan		全限系统得分				
$\geq$ Statistics	Asrign Garwar,		对医使工作综合评查	Atribute	Plus () Minus		0-5 Score 🖩
O Quality	Function Settin.			Score	+ Please enter a number as the score	re.	
🖄 Agents	Satisfaction rat.						
G Others	Keyword match				Cancel		
	Gustom sticker)					_	
Settings	Massaga setti ,						
团 Account	✓ Calloanter						
	Calicenter setti.						
	> Ticket						
	✓ Conversat						
	Conversations .						
	✓ Third party						

#### 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".

Admin		🔶 Agent mode   1
Account Account Account Info	Account Info In order to cooperate with the national network security management and fulfit the obligation of supervise not to afflect your subsequent use, please complete the subtentication as soon as possible, Control	sion, enterprises need to complete the real name auther ston
Account re	Account	Your business manager
order info ce stics thy ts	Agents purc Total 10, Enabled 1, Remaining 9, Ticket agents: Total 10, Enabled 0, Remaining 10, Call center a Total 10, Enabled 0, Remaining 10, All-channel a Total 20, Enabled 1, Remaining 19, Expres 2021#06月10日 Purchase	Name: 截冬預 Phone: 13011179092 Email: pengdj፼easemob.com
	Call center account info	
tings	0元 Balance 死胎 Account	
	Profile	

# **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.

Admin						
Search	Account	Orders	Order list	O Invoices li	st 🕜	Apply for electronic involce
습 Index	Account Info					
Access	Account re					
🔁 AI	order info					
Service						
💮 Monito 🔎						
∠ Statistics						
Quality						
음, Agents				ŕ		
C Others				2	o data	
Settings						
Account						